



# CEO Data Point 2025

Data visualizations for the top of The CEO Agenda



A monthly series built on BCG's  
market intelligence and research

# Visualizations

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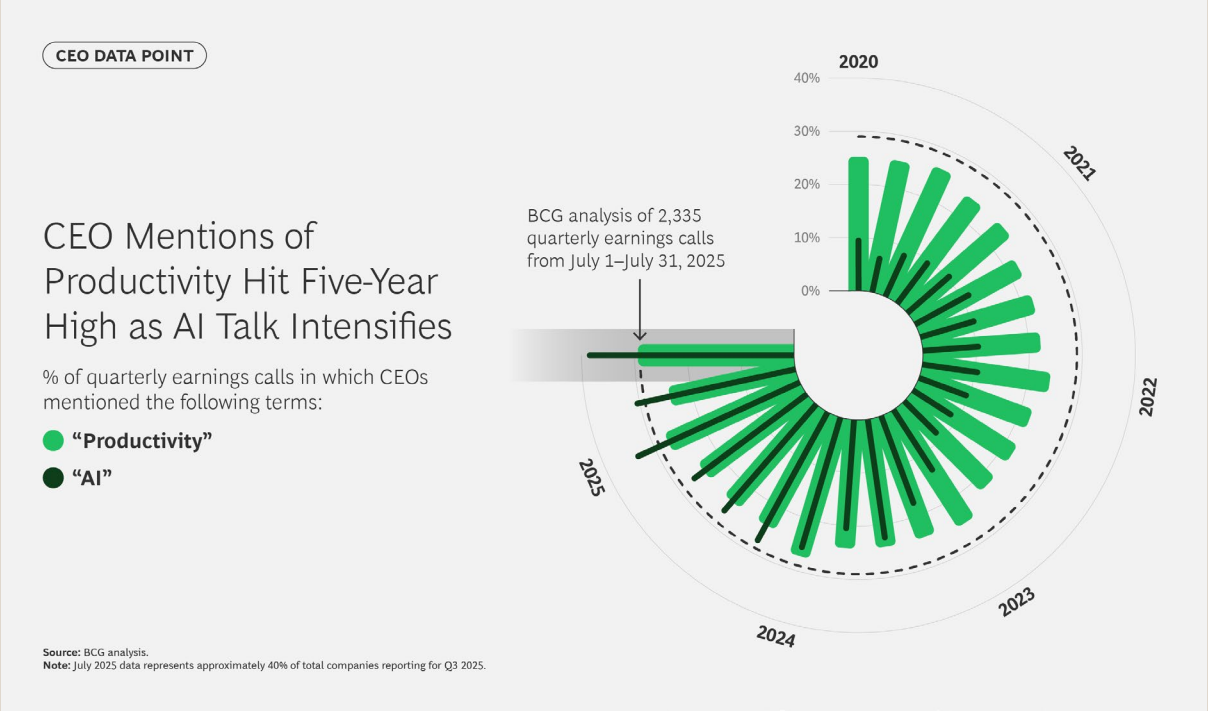
01

# AI Fuels Productivity Talk

With CEO mentions of AI continuing to increase, references to “productivity” reached a five-year peak during Q3 earnings calls through July 31, 2025.

(Published in August 2025)

1-a

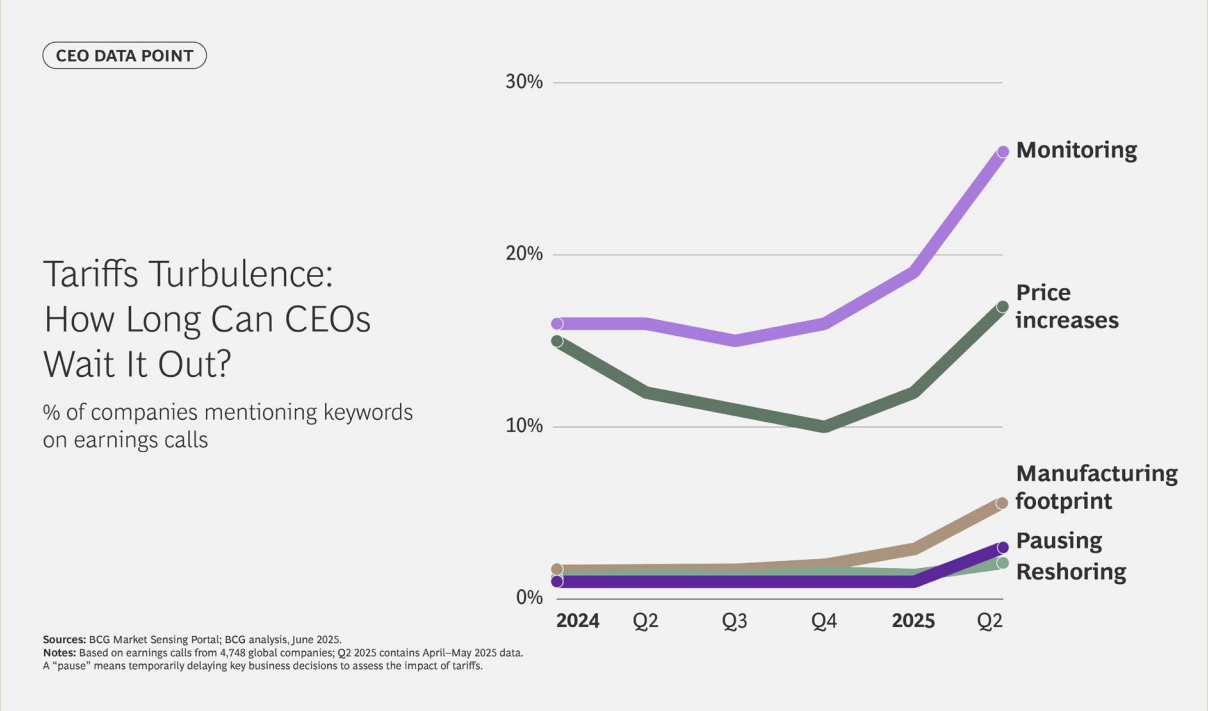


02

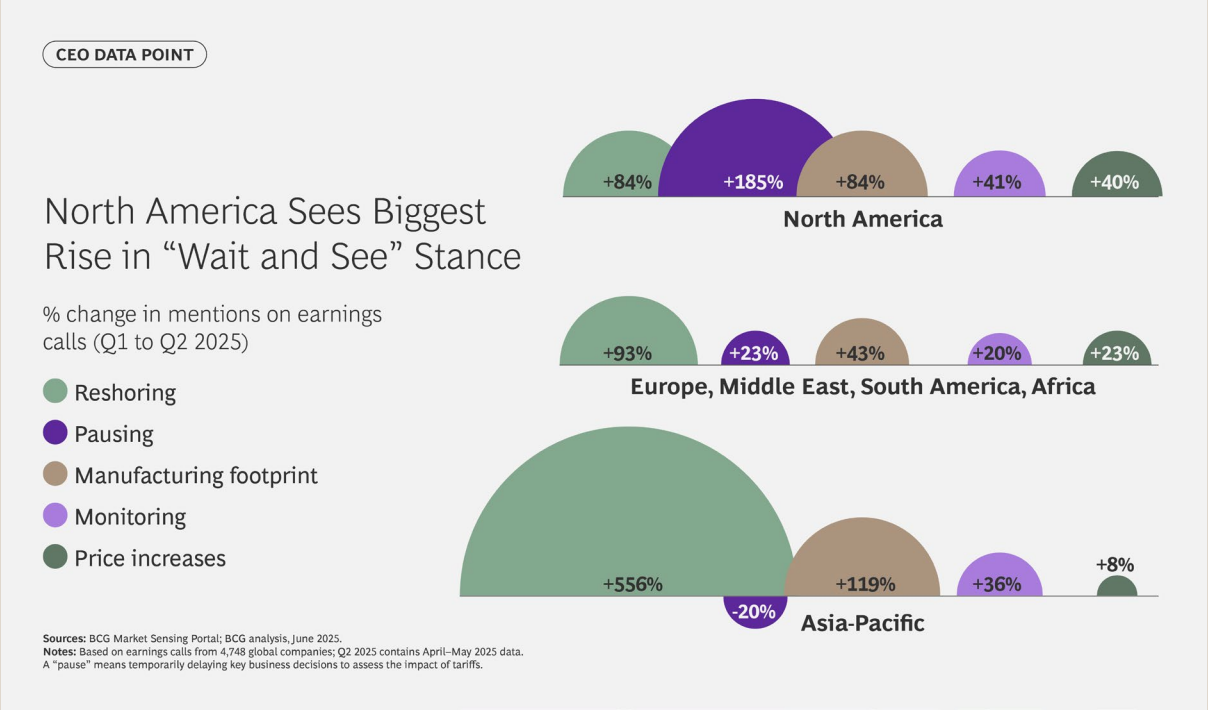
# Navigating New Tariffs

CEOs have grown more cautious in the face of tariff uncertainty, but the longer they wait to move forward with big decisions, the more they risk sapping growth momentum. (Published in June 2025)

2-a



2-b





03

# CEOs Recalibrate Their Global Operating Model

In a period of geopolitical upheaval, international businesses need to rethink how the different parts of their company work. Supply chain resilience is taking priority in the near term. Strategic partnership can be an alternative to cross-border M&A. Sales and talent management are likely to be more regionalized.

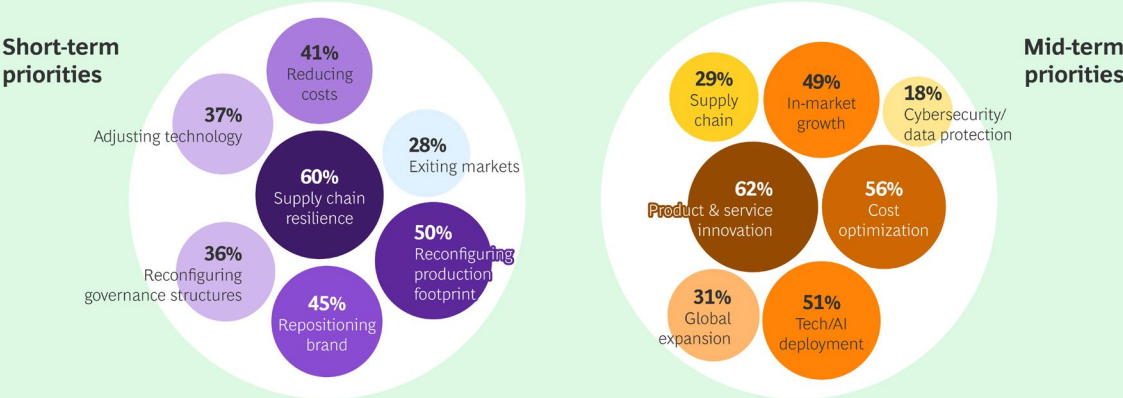
(Published in May 2025)

3-a

CEO DATA POINT

## CEOs Are Prioritizing Supply Chain Resilience in the Short Term, While Product and Service Innovation Is a Mid-Term Priority

% of respondents ranking action in their top 3 priorities



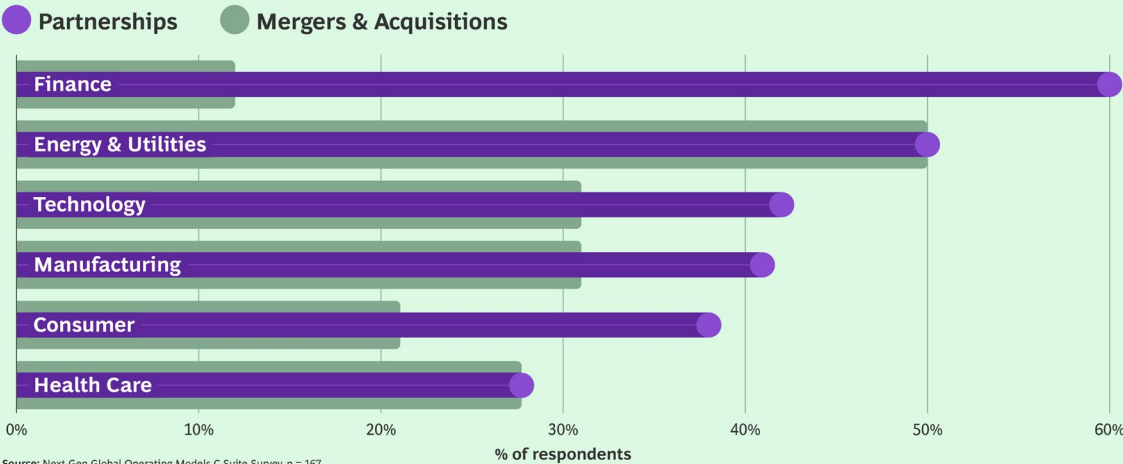
Source: Next-Gen Global Operating Models C-Suite Survey, n = 167.  
Note: Short-term priorities are immediate actions in 2025 in response to geopolitical shifts. Mid-term priorities are priorities over the next 1-2 years.

3-b

CEO DATA POINT

## CEOs Turn to Strategic Partnerships to Drive Growth

In the next 3-5 years, what will be more critical to growth?



Source: Next-Gen Global Operating Models C-Suite Survey, n = 167.  
Note: Excludes respondents who answered "neutral."

03

# CEOs Recalibrate Their Global Operating Model

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(Published in May 2025)

3-c

CEO DATA POINT

## Large Companies Plan to Regionalize Sales and Talent

On a scale of 1–5, would you rather centralize or regionalize this function by 2027?



Source: Next-Gen Global Operating Models C-Suite Survey, n = 167.  
Note: Includes only companies with annual revenue over \$5 billion.

04

# No Quarter Given by Investors

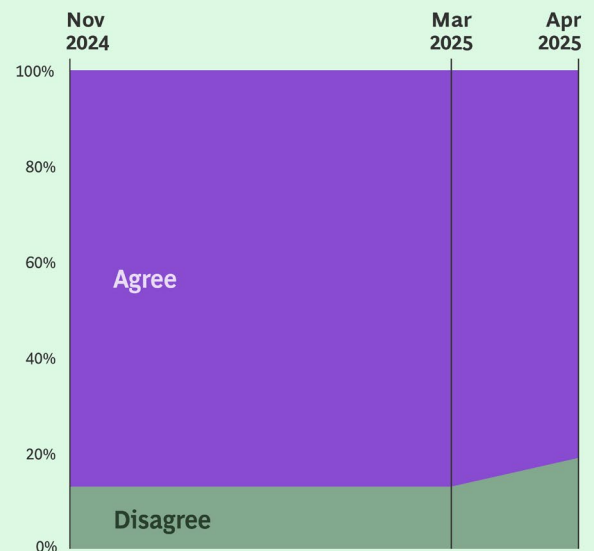
While CEOs figure out how to respond to the threat of higher tariffs, investors are still holding them to their earnings forecast. Supply chain resilience, profit margins, and debt levels are also under scrutiny. (Published in May 2025)

4-a

## CEO DATA POINT

### With Uncertainty, CEOs Still Need to Deliver on Earnings

“It is important for healthy companies to deliver EPS over the current fiscal year that at least meets guidance/consensus”



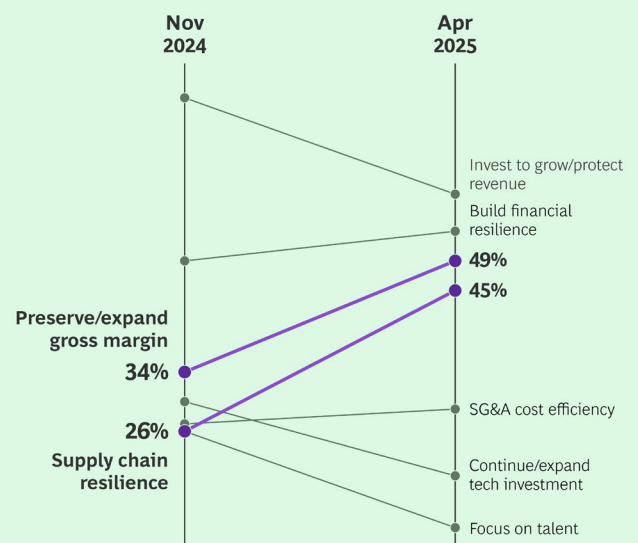
Source: BCG's Investor Perspectives Series, November 2024–April 2025; n = 150 (March 2025, n = 151).  
Note: EPS = earnings per share.

4-b

## CEO DATA POINT

### Protecting Margins and Supply Chains Are Rising Investor Priorities

% investors who placed action in their top 3 priorities for a financially healthy company



Source: BCG's Investor Perspectives Series, November 2024–April 2025; n = 150.  
Note: SG&A = selling, general, and administrative. Priorities ranked below 20% during both surveys aren't shown.

04

# No Quarter Given by Investors

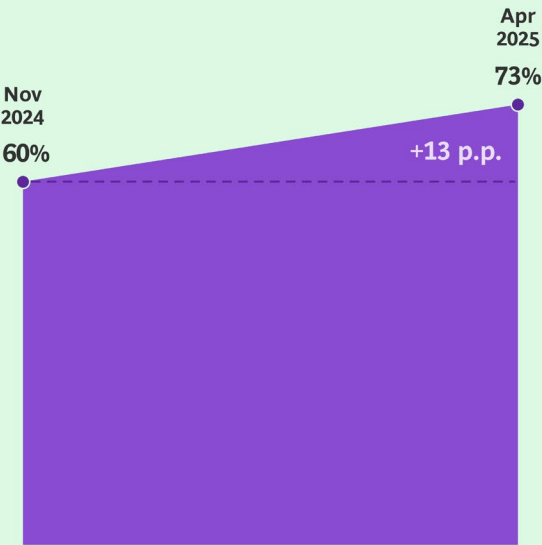
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4-c

CEO DATA POINT

## Investors Are Increasingly Wary of Companies Carrying Debt

% investors actively avoiding or reducing exposure to companies carrying higher leverage



Source: BCG's Investor Perspectives Series, November 2024–April 2025; n = 150.



05

# Tariffs Weigh on Consumers' Minds

CEOs, take note: BCG's latest consumer radar shows most expect their personal finances to be hit by higher prices as a result of tariffs. (Published in March 2025)

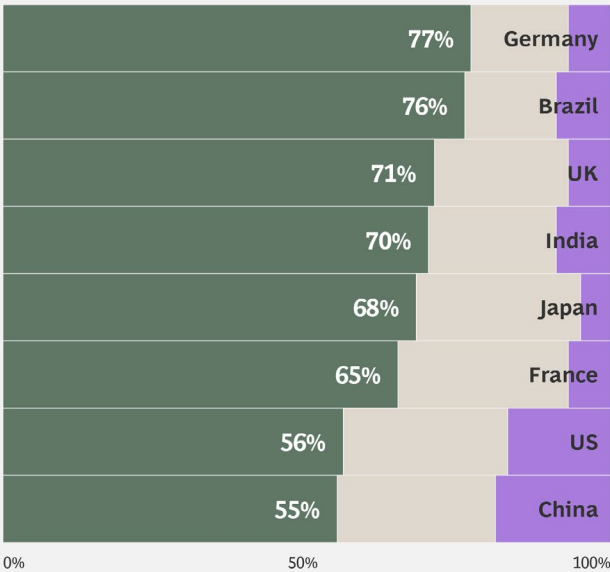
5-a

CEO DATA POINT

## While Most Consumers Expect Tariffs to Make Them Worse Off ...

"Tariffs will worsen inflation and further raise the price of goods and services"

- Agree
- Neither
- Disagree



Source: BCG Global Consumer Radar Survey, February 2025, n = 7,285.

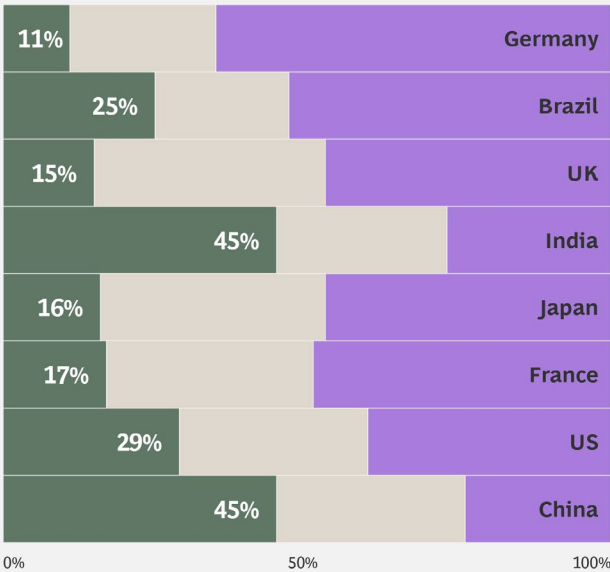
5-b

CEO DATA POINT

## ... Some Believe Their Country Will Benefit

"Tariffs and a global trade war will benefit my country"

- Agree
- Neither
- Disagree



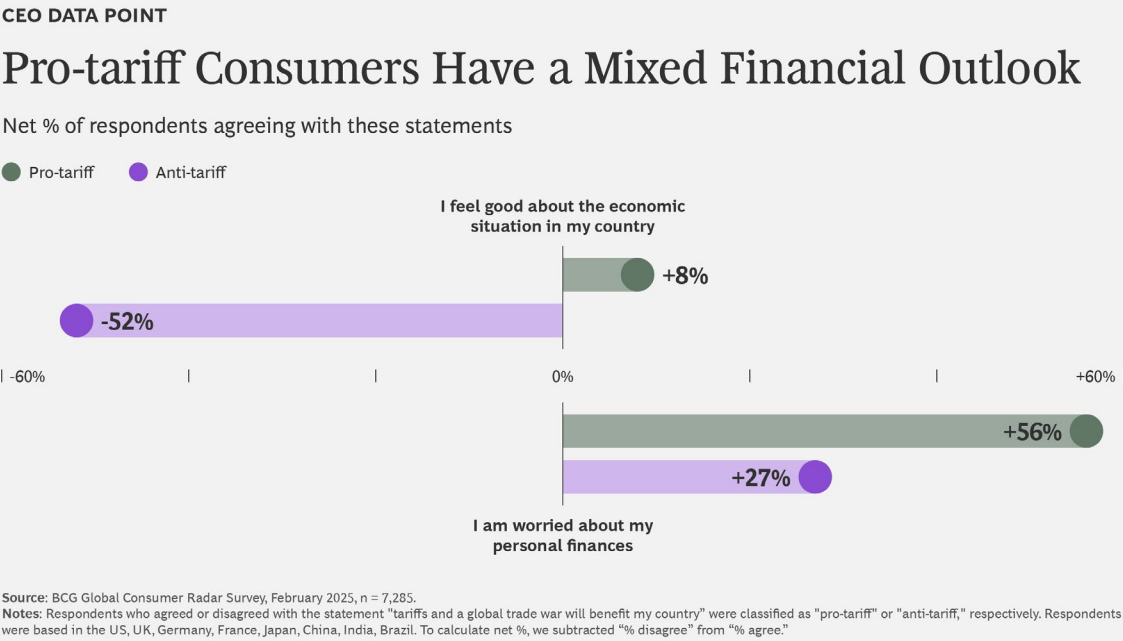
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05

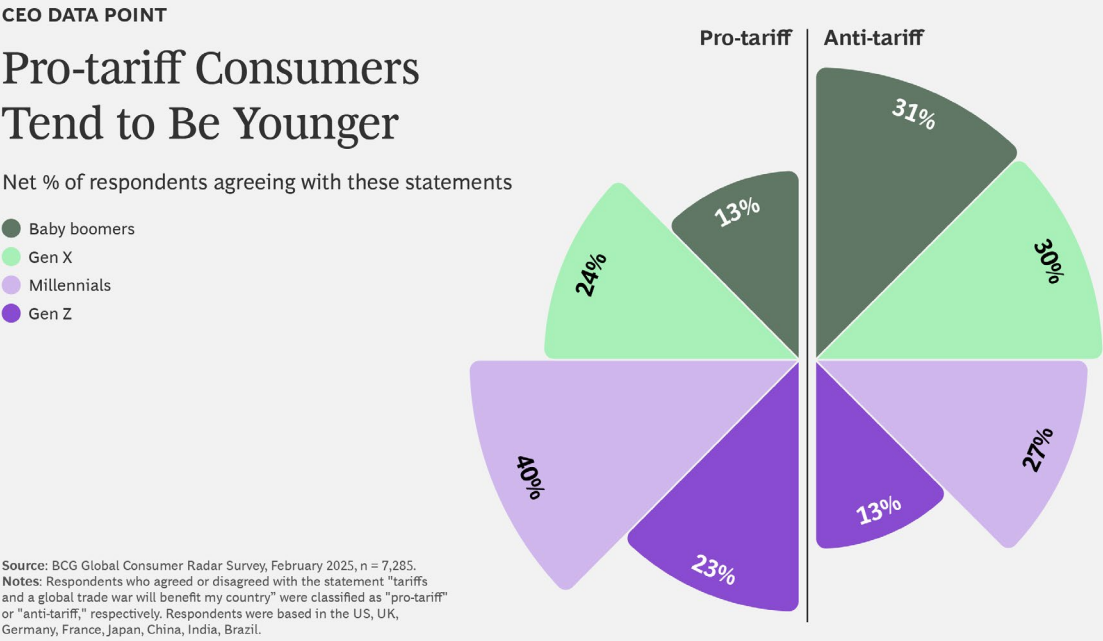
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5-c



5-d



06

# The Rise of AI Agents

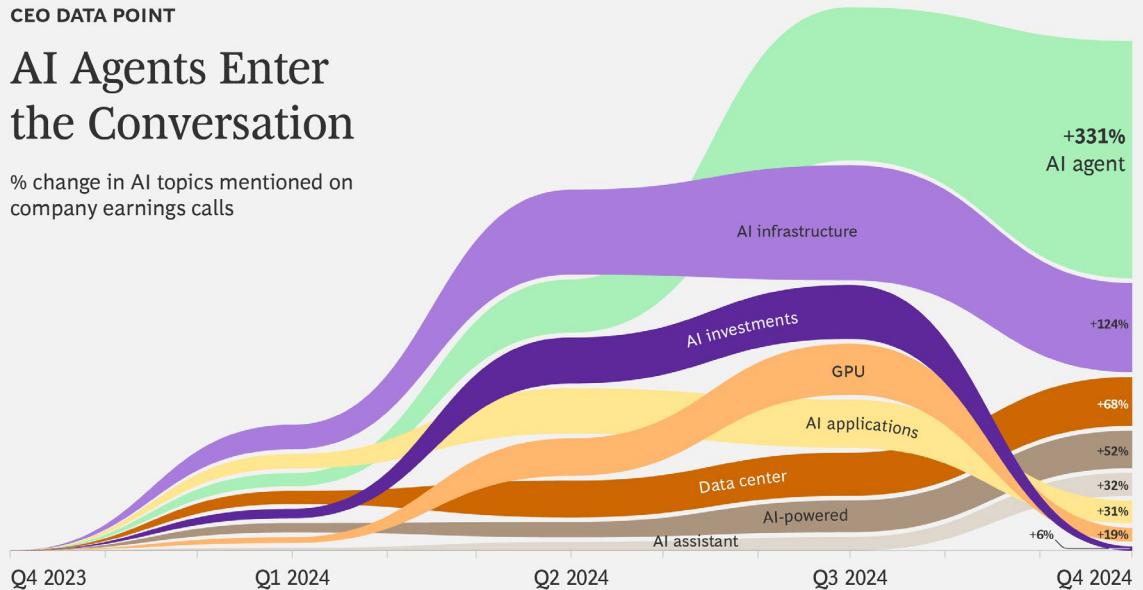
Companies searching for impact from AI increasingly see agents—software that doesn't just respond to instructions but learns and adapts on its own—as the big opportunity. Is 2025 the year of AI agents? (Published in February 2025)

6-a

CEO DATA POINT

## AI Agents Enter the Conversation

% change in AI topics mentioned on company earnings calls



Source: IoT Analytics.

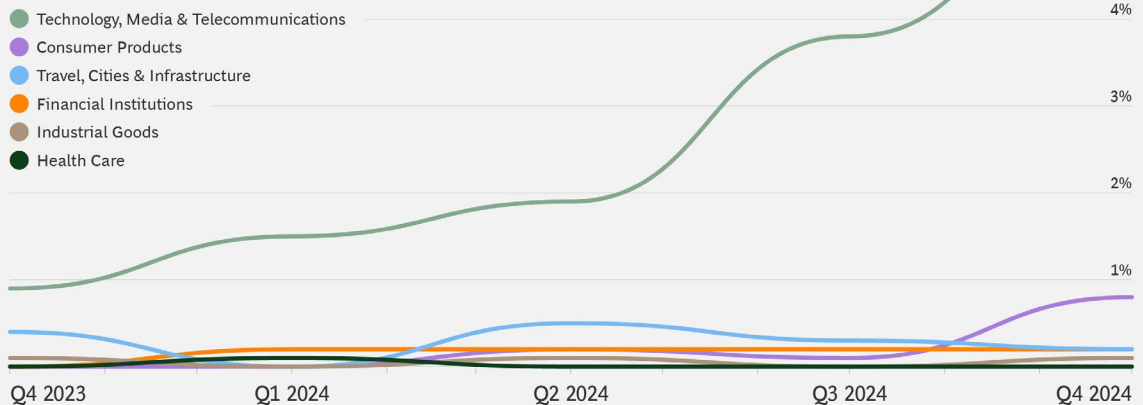
Note: Excludes topics with a negative change in proportion of mentions.

6-b

CEO DATA POINT

## Tech Companies Take the Lead

% mentioning "AI agent" on earnings calls, by industry



Source: IoT Analytics.

07

# Investing in Growth

BCG's latest Global Investor Survey finds investors optimistic about the economy and capital markets over the next three years, despite macro risks and relatively high market valuations. For CEOs, the message is to invest for growth but to keep an eye on the bottom line.

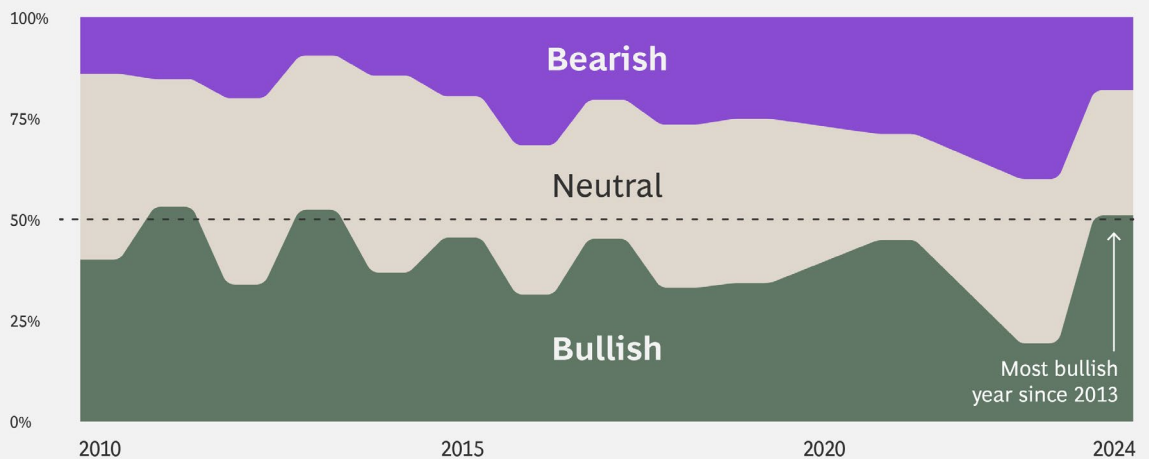
(Published in January 2025)

7-a

## CEO DATA POINT

### Investor Optimism at Its Highest in More than a Decade ...

Where surveyed investors placed themselves on the bull/bear spectrum for the next 12 months (%)



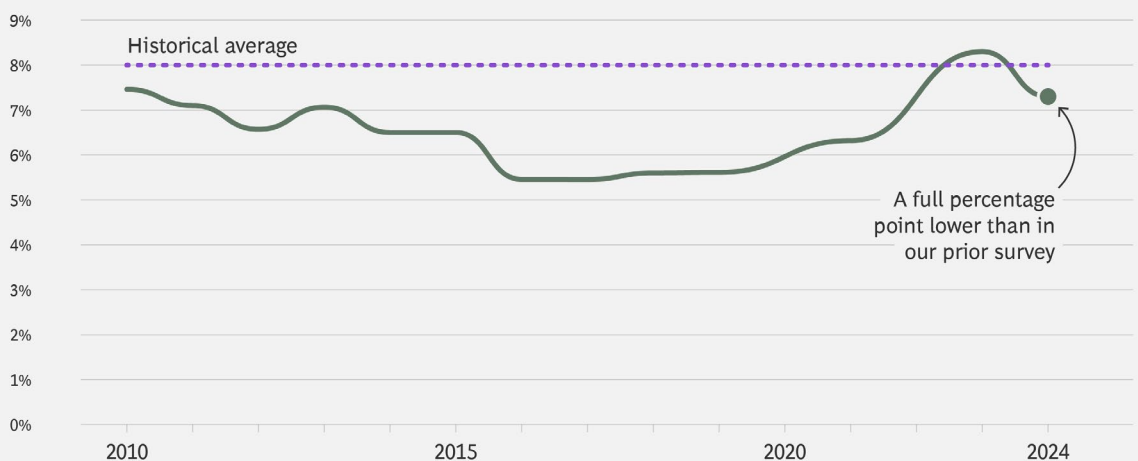
Source: BCG Global Investor Survey, November 2024 (n=543).  
Note: Surveys were not conducted in 2020 and 2022.

7-b

## CEO DATA POINT

### ... but Expectations for Market Returns Have Moderated Slightly

Average expected total shareholder return in subsequent 3-year period



Source: BCG Global Investor Surveys, 2010–2024.  
Note: Surveys were not conducted in 2020 and 2022. Historical average: Median TSR in the S&P 500 from 1955–present (using rolling 5-year time windows, adjusted for differences in inflation).

07

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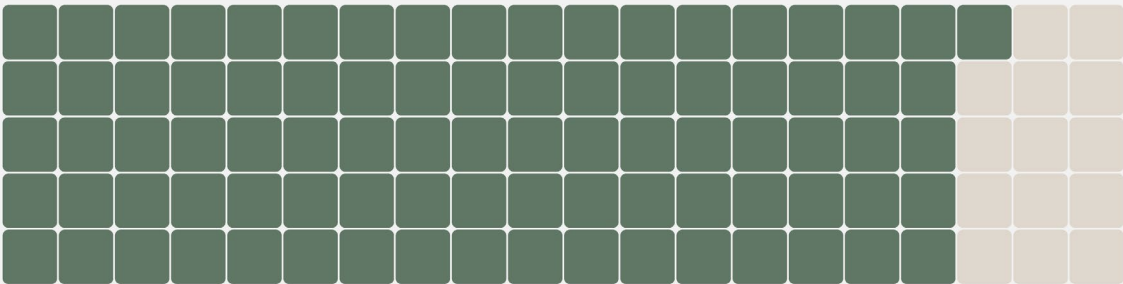
7-c

CEO DATA POINT

## CEOs Are Urged to Invest for Growth

86%

of investors want companies to strengthen longer-term advantage



Source: BCG Global Investor Survey, November 2024 (n=543).  
Note: Proportion of investors who agreed/strongly agreed with the statement “Companies should prioritize building business capabilities, even if it means guiding to lower EPS or delivering below consensus”.



# BCG CEO Data Point

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