



CEO Data Point

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

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.

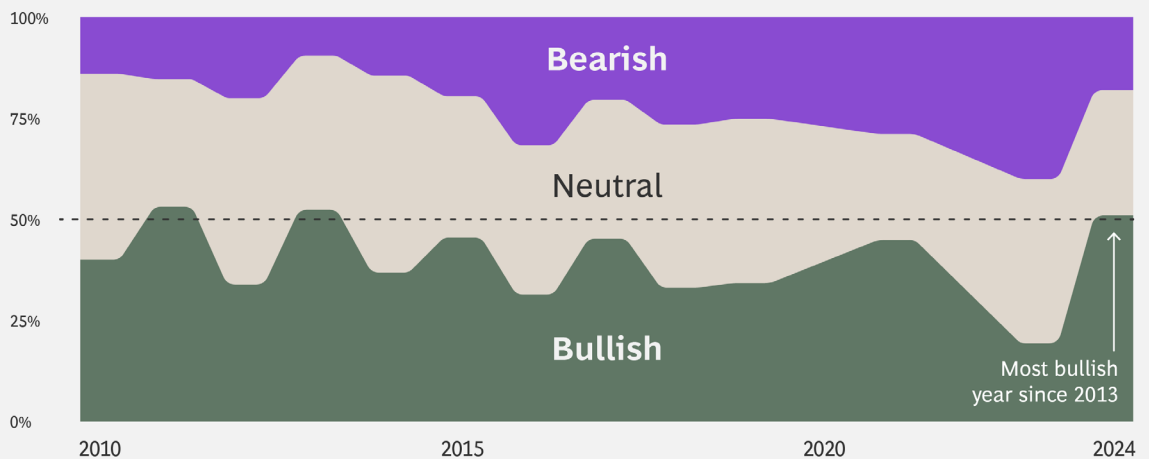
(Published in January 2025)

1-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 (%)



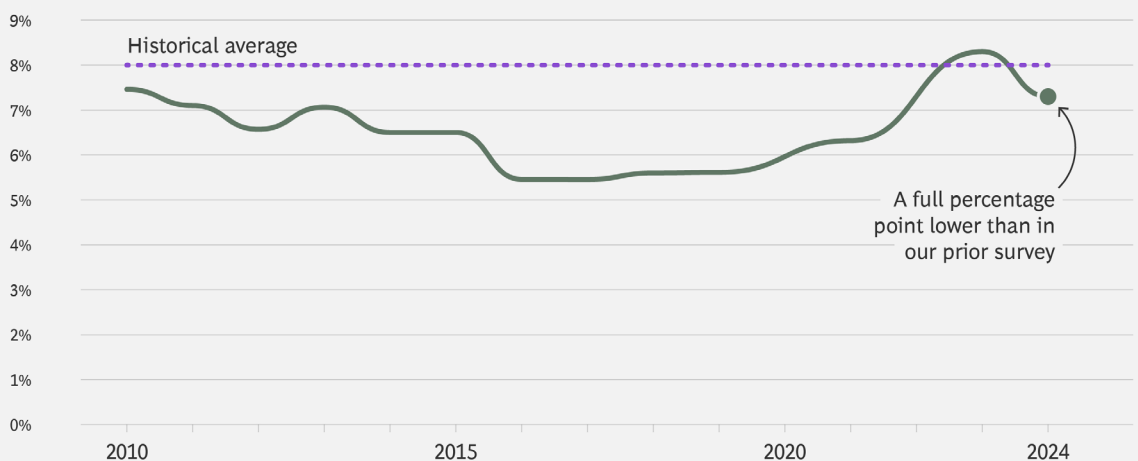
Source: BCG Global Investor Survey, November 2024 (n=543).
Note: Surveys were not conducted in 2020 and 2022.

1-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).

01

Investing in Growth

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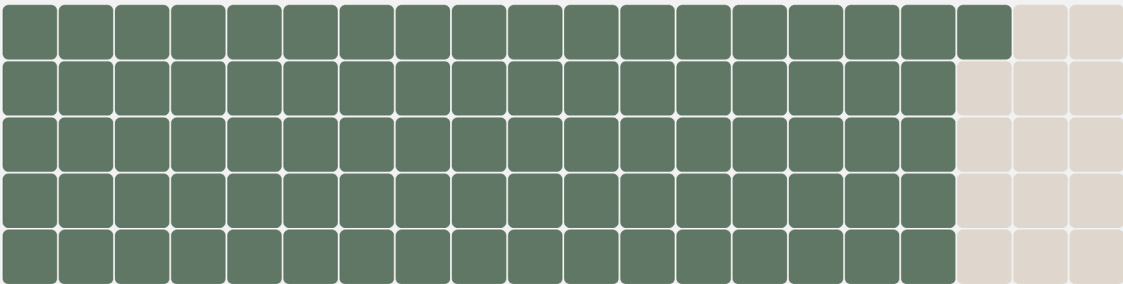
1-c

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”.

02

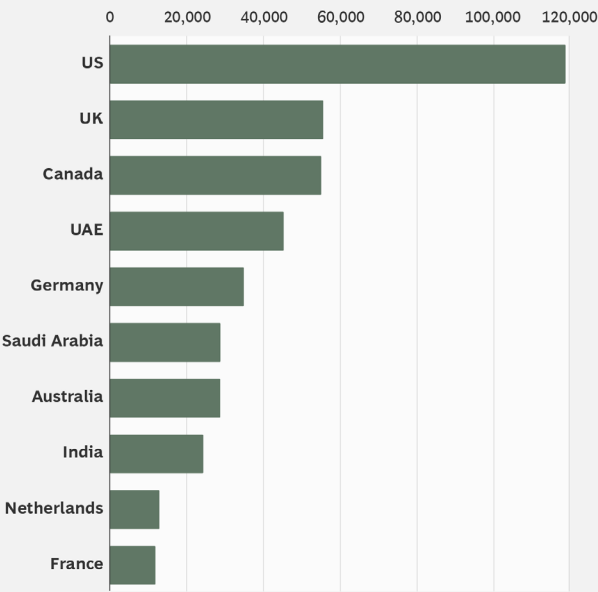
The Global Race for STEM Talent

In the past 12 months, roughly 613,000 STEM experts moved across borders, according to BCG’s Top Talent Tracker. While the US remains the top talent hot spot for STEM experts, Australia, Saudi Arabia, and Canada do a better job retaining them. (Published in December 2024)

2-a

The US Is the Top Destination for STEM Talent

Number of STEM experts moving to top ten markets over 12 months through Q4 2024



Sources: BCG Top Talent Tracker, Q4 2024; BCG analysis.

2-b

Australia, Saudi Arabia, and Canada Better Retain STEM Talent

Number of STEM experts retained for every STEM expert lost



Sources: BCG Top Talent Tracker, Q4 2024; BCG analysis.

03

AI's Energy Impact

As the AI conversation continues, North American companies are increasingly discussing energy concerns on earnings calls. With U.S. data center power demand projected to more than double by 2030, the energy needed for AI is coming into focus. (Published in October 2024)

3-a

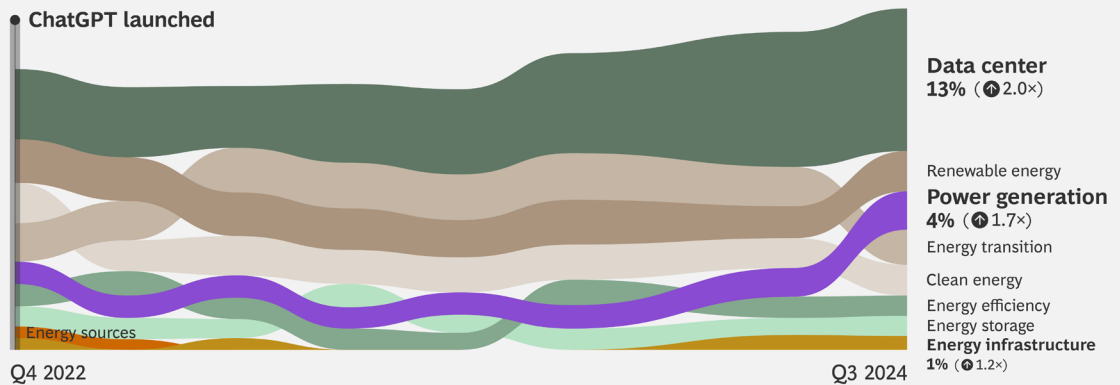
CEO DATA POINT

Trending with the AI Conversation: Powering Data Centers

Energy topics mentioned on earnings calls in North America (%)

⬆ Increase between Q4 2022 and Q3 2024

• ChatGPT launched



Source: IoT Analytics.

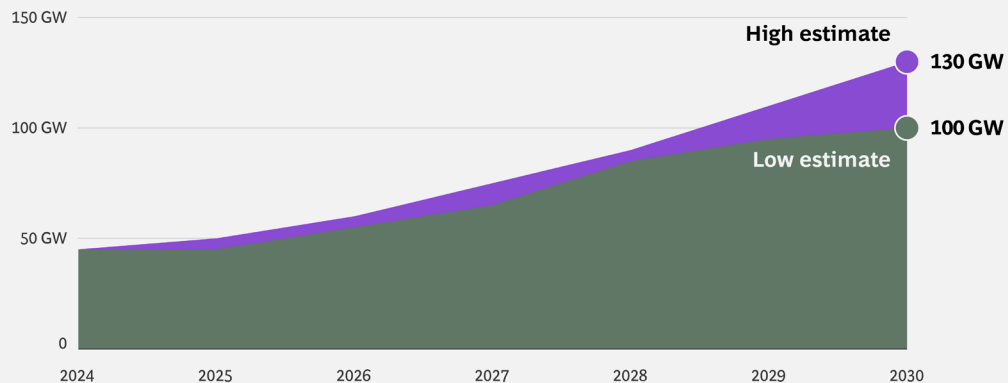
Note: A topic is shown in a quarter if at least 1% of sample companies mentioned it.

3-b

CEO DATA POINT

US Data Center Energy Demand Could More Than Double by 2030

Projected total US data center power demand



Sources: NERC; market participant interviews; BCG analysis.

04

Global Consumer Sentiment Survey

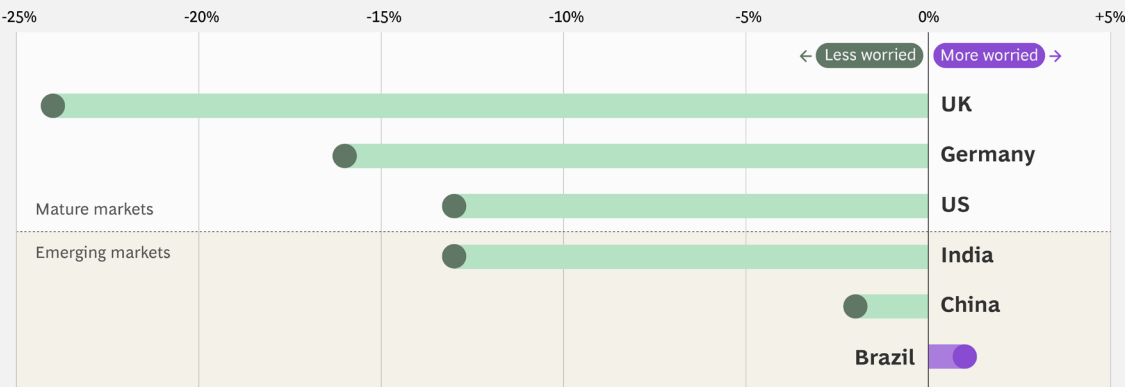
Consumer sentiment is recovering more slowly in emerging markets than in mature markets, the latest survey from BCG’s Center for Customer Insight reveals. Explore more key findings. (Published in September 2024)

4-a

CEO DATA POINT

Fewer Consumers Are Worried About Their Financial Situation

Change in agreement with the statement “I am worried about my personal financial situation” over 12 months



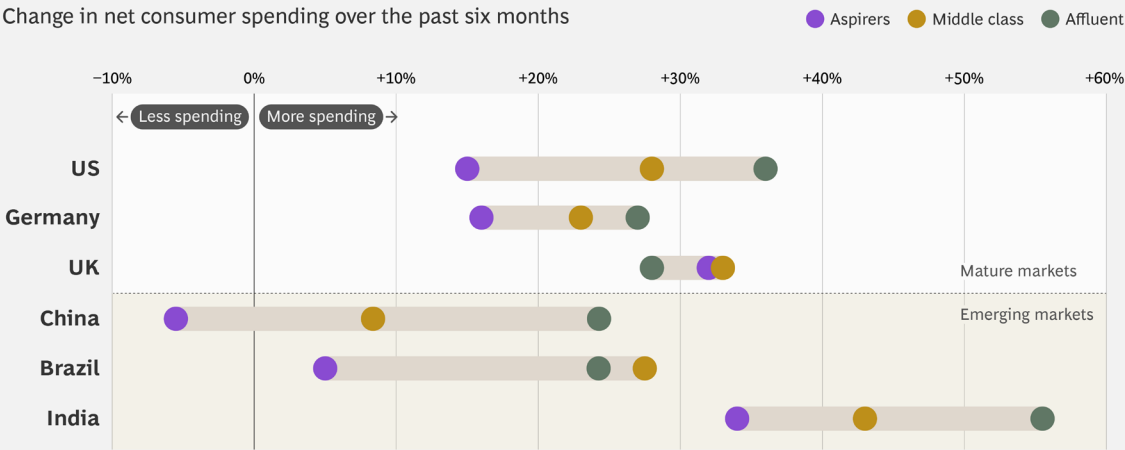
Source: BCG CCI Global Consumer Sentiment Barometer 2024, n = 6,090.

4-b

CEO DATA POINT

People Are Spending More Overall, Largely Due to Higher Prices

Change in net consumer spending over the past six months



Source: BCG CCI Global Consumer Sentiment Barometer 2024, n = 6,090.

04

Global Consumer Sentiment Survey

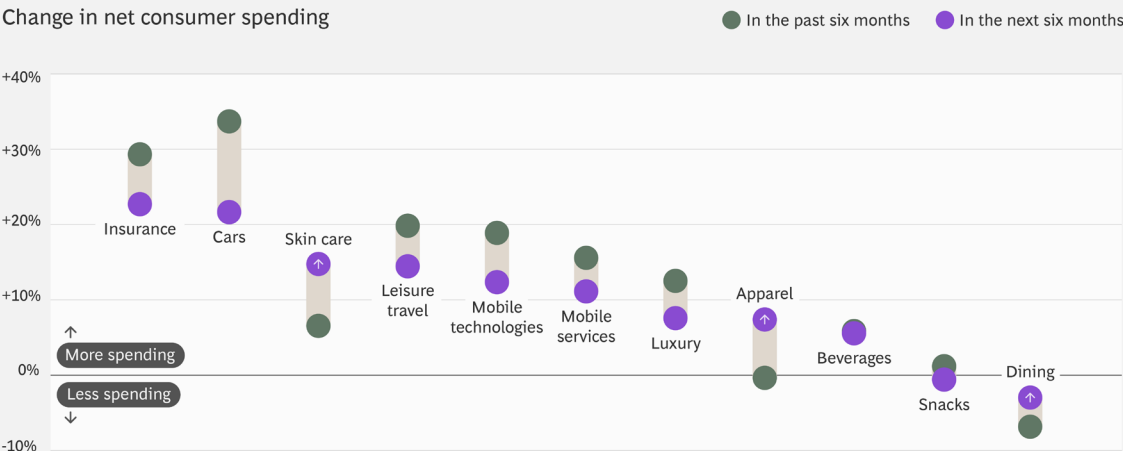
Consumer sentiment is recovering more slowly in emerging markets than in mature markets, the latest survey from BCG’s Center for Customer Insight reveals. Explore more key findings.

(Published in September 2024)

4-c

CEO DATA POINT

Spending on Most Things Is Poised to Keep Growing, but More Slowly



Source: BCG CCI Global Consumer Sentiment Barometer 2024, n = 6,090.

05

Scope 3 Emissions

Companies are measuring and setting targets for operational emissions. But supply chain emissions are being overlooked, particularly in certain industries. (Published in August 2024)

5-a

CEO DATA POINT

Scope 3 Supply Chain Emissions Far Exceed Operational Emissions

Operational emissions

Average Scope 1+2 emissions from companies



Supply chain emissions

Average upstream Scope 3 emissions from companies are **26x greater**



Source: CDP and BCG upstream emissions data and analysis, 2024.

5-b

CEO DATA POINT

Companies Are Less Likely to Measure Scope 3 Emissions, or Set Targets

**2x**

more likely to measure Scope 1+2 than Scope 3

**2.4x**

more likely to set targets for Scope 1+2 than Scope 3

Source: CDP and BCG upstream emissions data and analysis, 2024.

05

Scope 3 Emissions

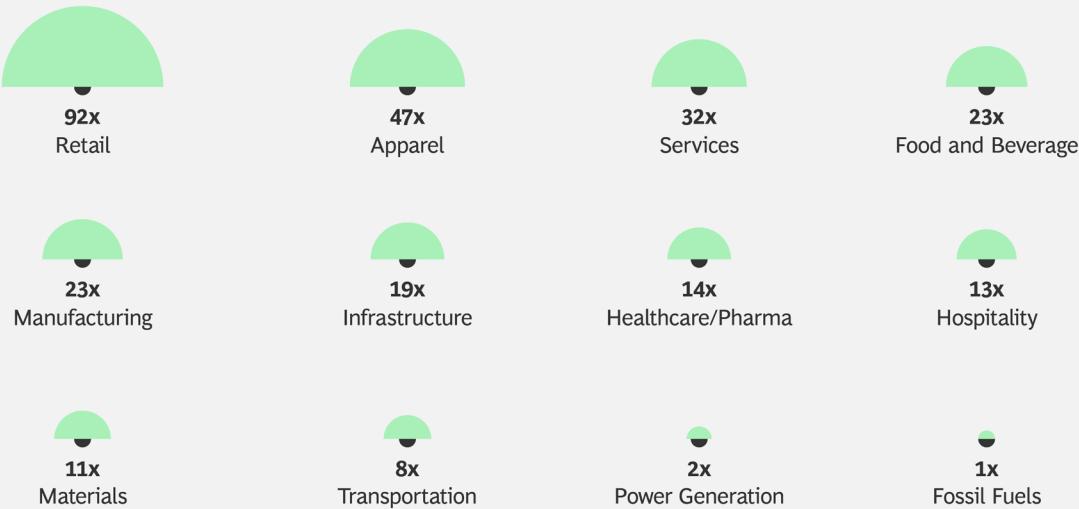
Companies are measuring and setting targets for operational emissions. But supply chain emissions are being overlooked, particularly in certain industries. (Published in August 2024)

5-c

CEO DATA POINT

Some CEOs Face a Significant Scope 3 Challenge

How much greater are **Scope 3** emissions than **Scope 1+2**?

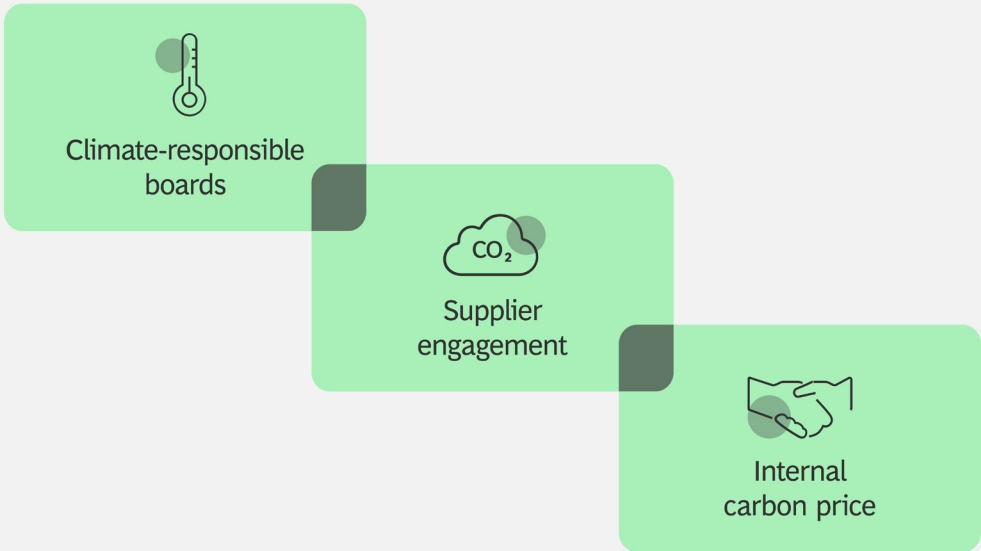


Source: CDP and BCG upstream emissions data and analysis, 2024.

5-d

CEO DATA POINT

Three Factors Can Kick-Start Action on Supply Chain Emissions



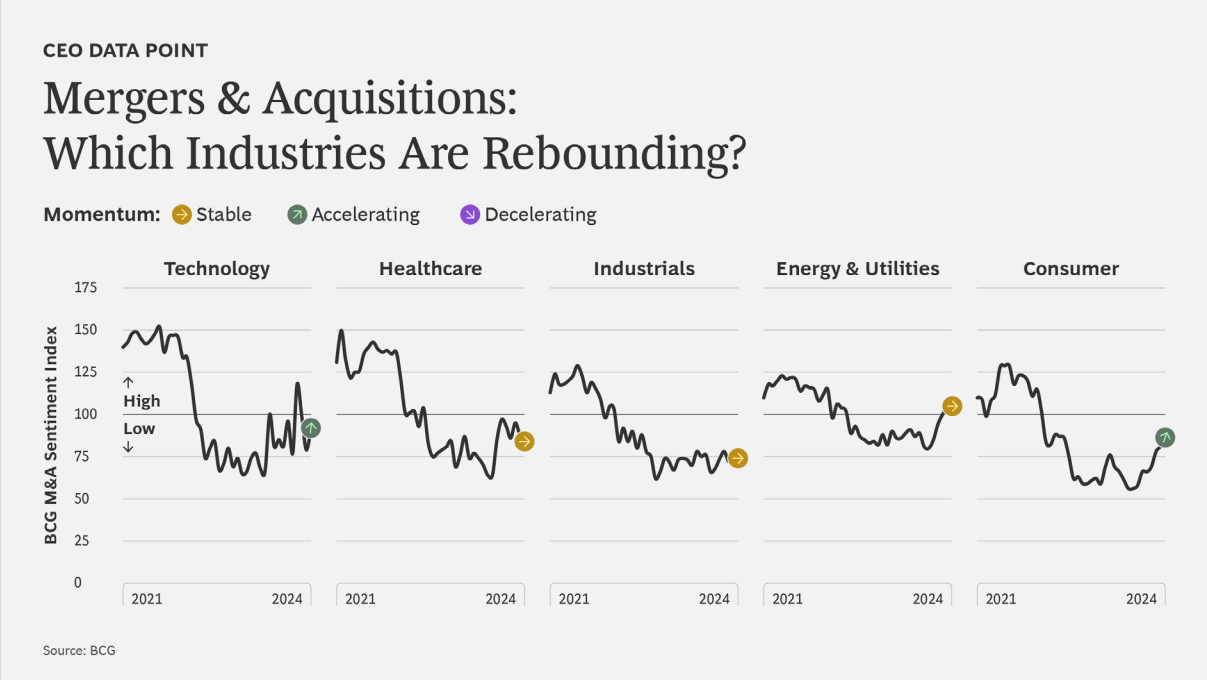
Source: CDP and BCG upstream emissions data and analysis, 2024.

06

M&A’s Road to Recovery

Dealmakers are more willing to engage in mergers and acquisitions than they were in late 2023, according to BCG’s newly launched M&A Sentiment Index. (Published in July 2024)

6-a



07

Europe's Transformation Imperative

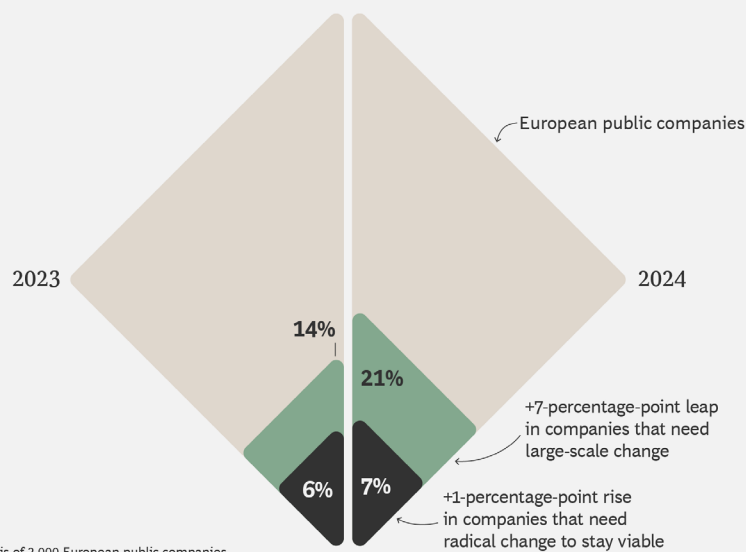
Low consumer confidence, weak domestic economic growth, and declining international competitiveness are adding to the strain on European companies. (Published in June 2024)

7-a

CEO DATA POINT

The Growing Pressure on Europe's CEOs

% of companies needing to **transform** or even **restructure**

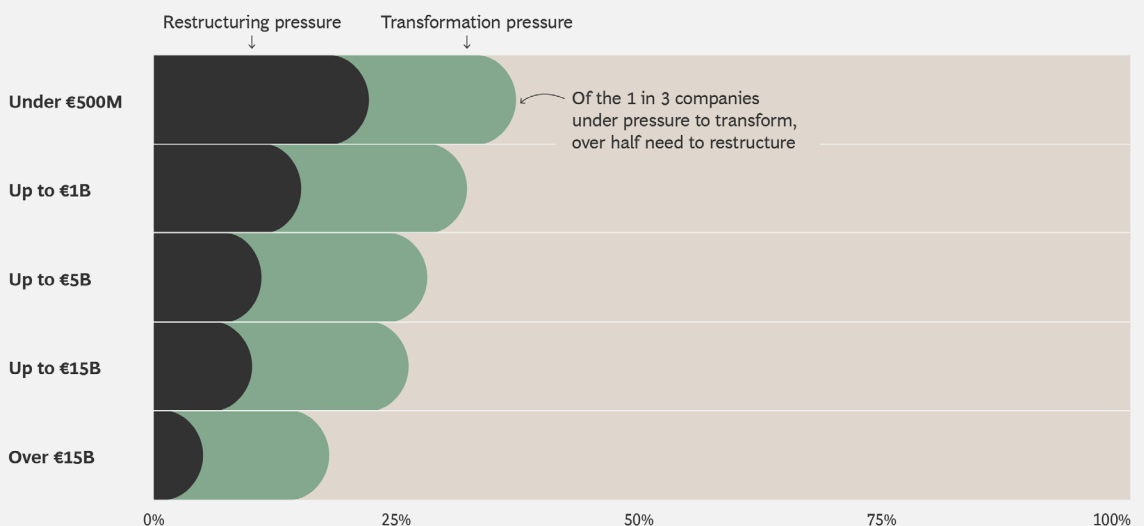


7-b

CEO DATA POINT

Smaller Companies, Bigger Stress

% of European public companies by revenue, 2024



07

Europe’s Transformation Imperative

Low consumer confidence, weak domestic economic growth, and declining international competitiveness are adding to the strain on European companies. (Published in June 2024)

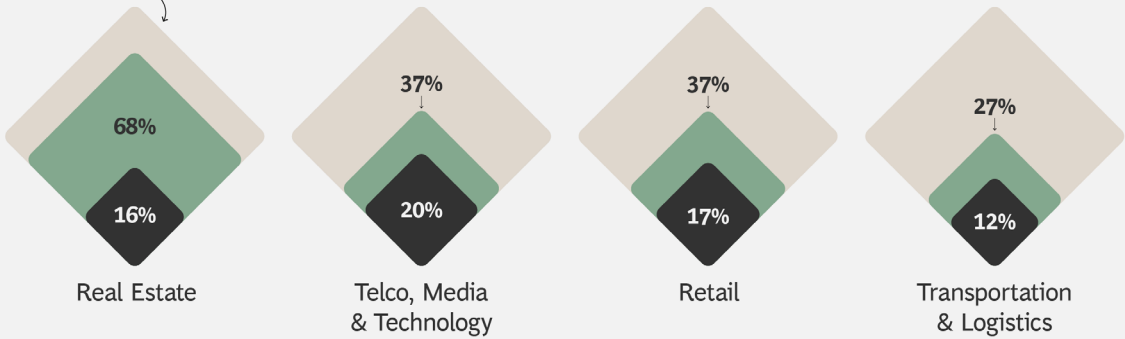
7-c

CEO DATA POINT

The Greatest Need to Act, by Sector

% of companies needing to **transform** or even **restructure**

European public companies



Sources: Capital IQ; BCG analysis of 2,000 European public companies.

08

The Evolving AI Conversation

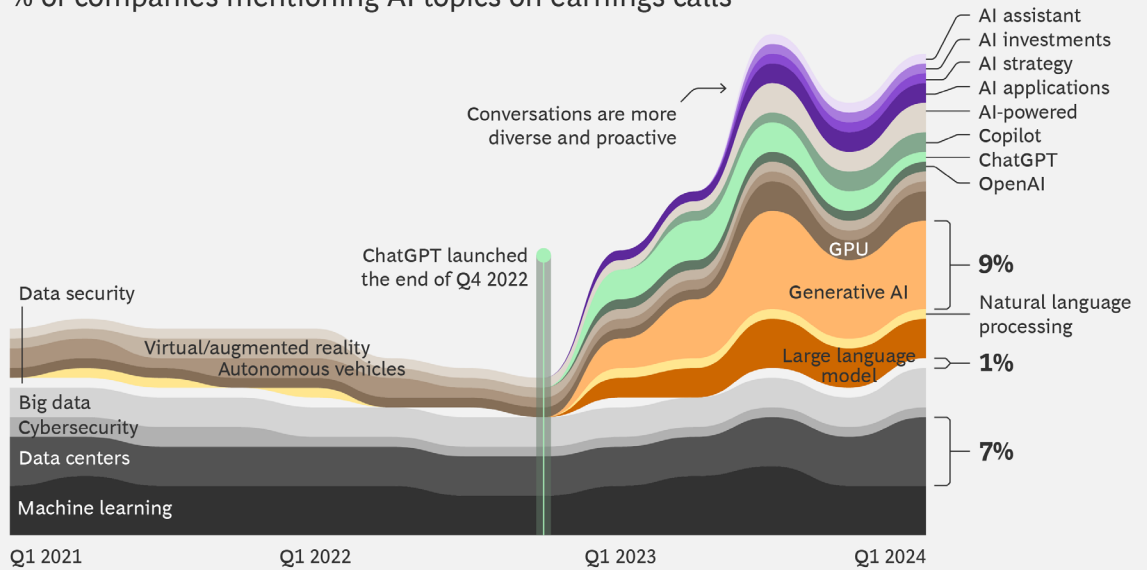
What do CEOs talk about when they talk about artificial intelligence? And which region is leading the conversation? (Published in May 2024)

8-a

CEO DATA POINT

Louder and Smarter: The Evolving AI Conversation

% of companies mentioning AI topics on earnings calls



Source: IOT Analytics GMBH.

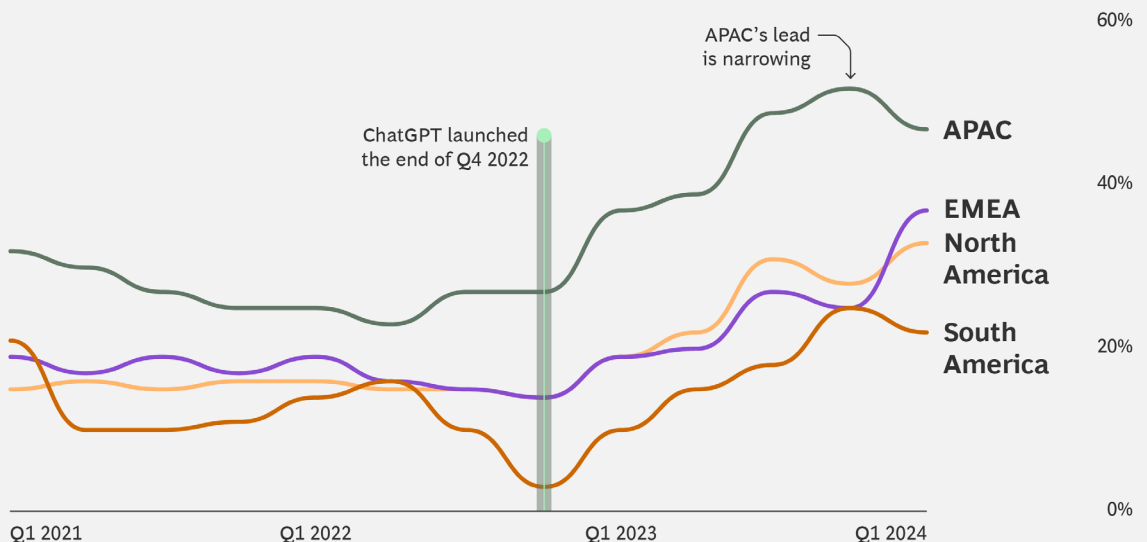
Note: a topic is only shown in a quarter if 1% or more companies in the data sample mentioned it

8-b

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Closing the Gap with APAC

% of companies mentioning "AI" or "artificial intelligence" on earnings calls



Source: IOT Analytics GMBH

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