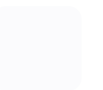




BECOMING FUTURE READY

Howard Yu

The LEGO® Professor of Management and Innovation



A simple roadmap

01

What is future readiness?

Hallmarks of a future-ready organizations.

02

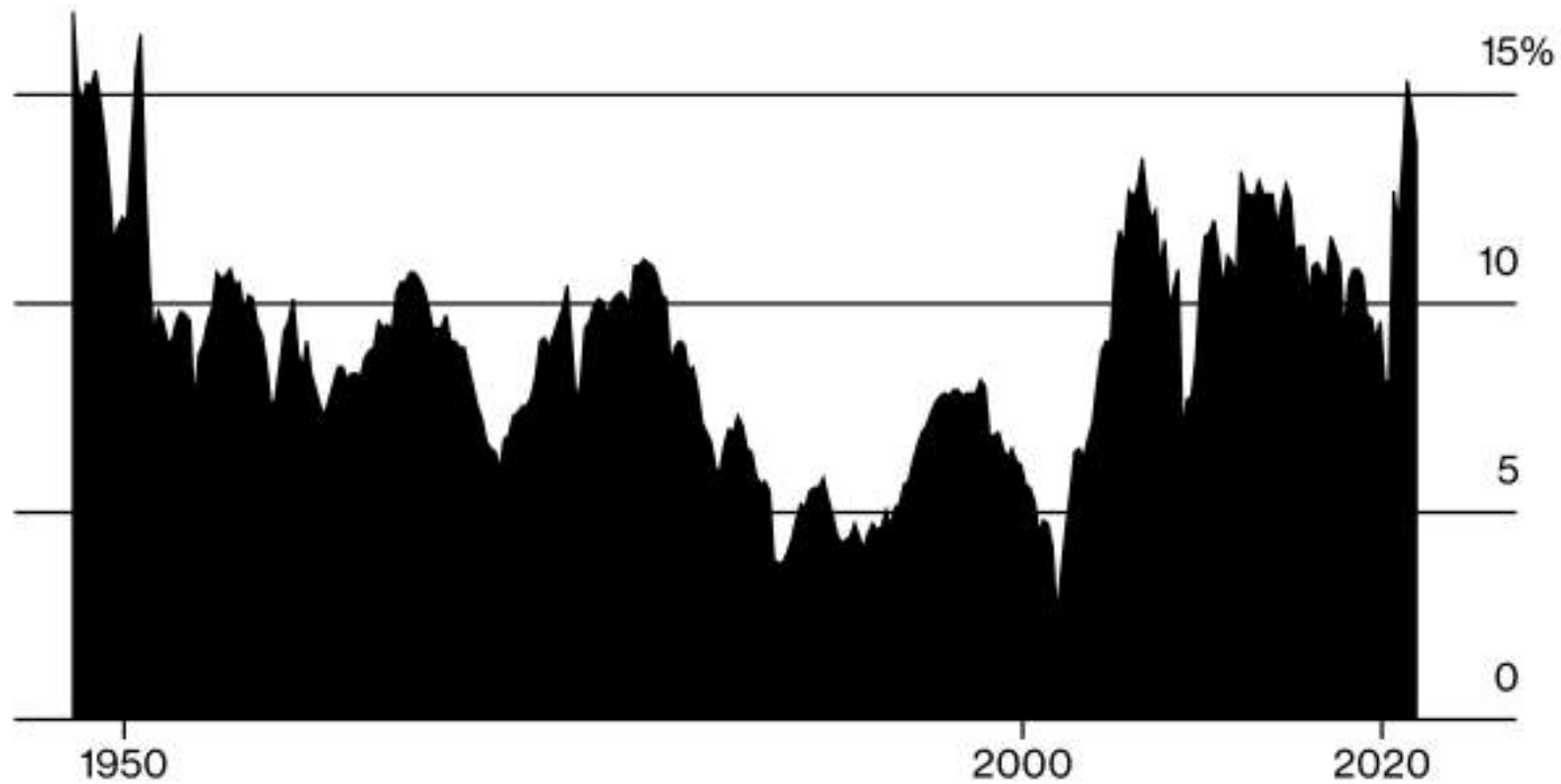
03

How can you become future-ready?

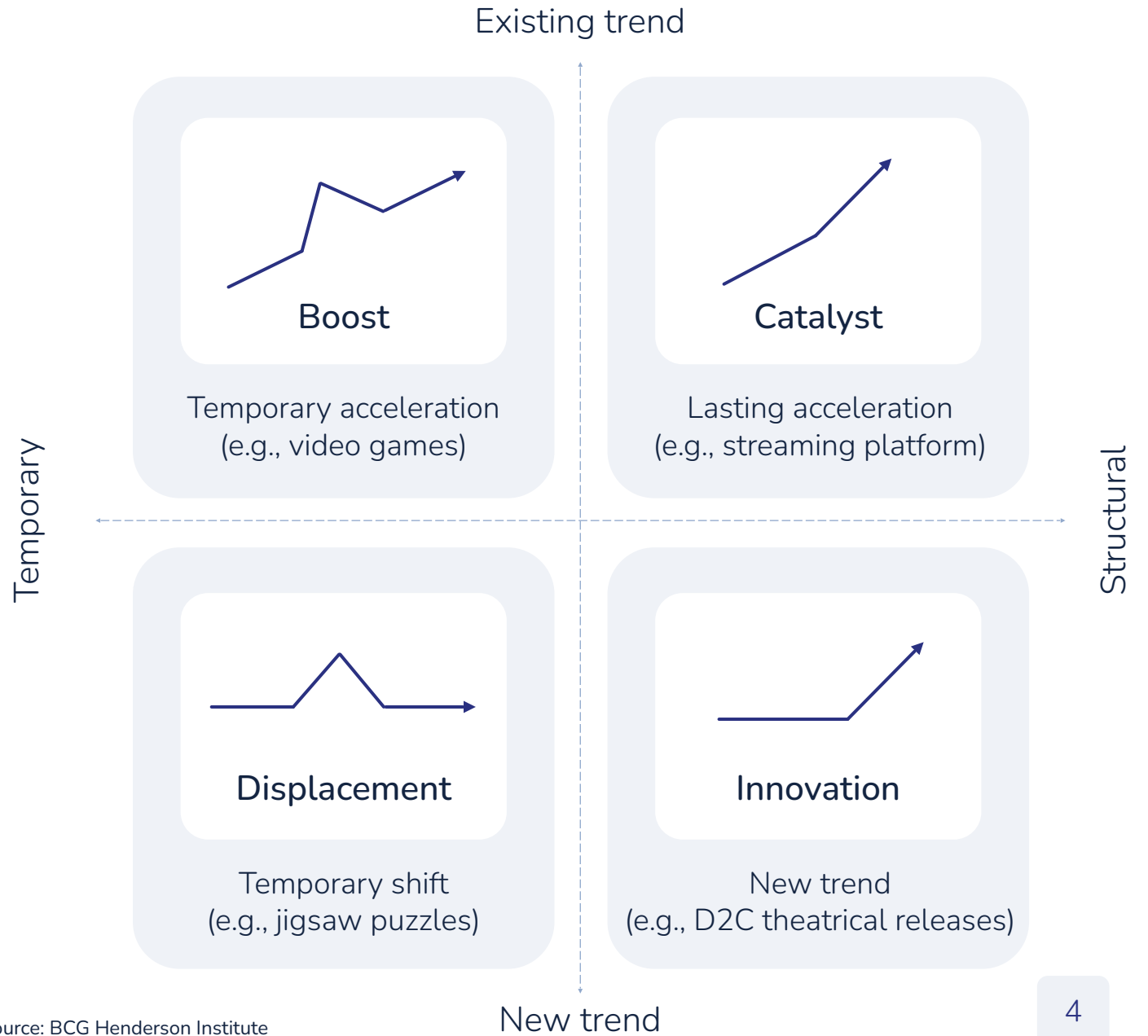
Making Money

Profit margins rise to most since 1950

Margin = seasonally adjusted profit as share of gross value added by nonfinancial corporate business.

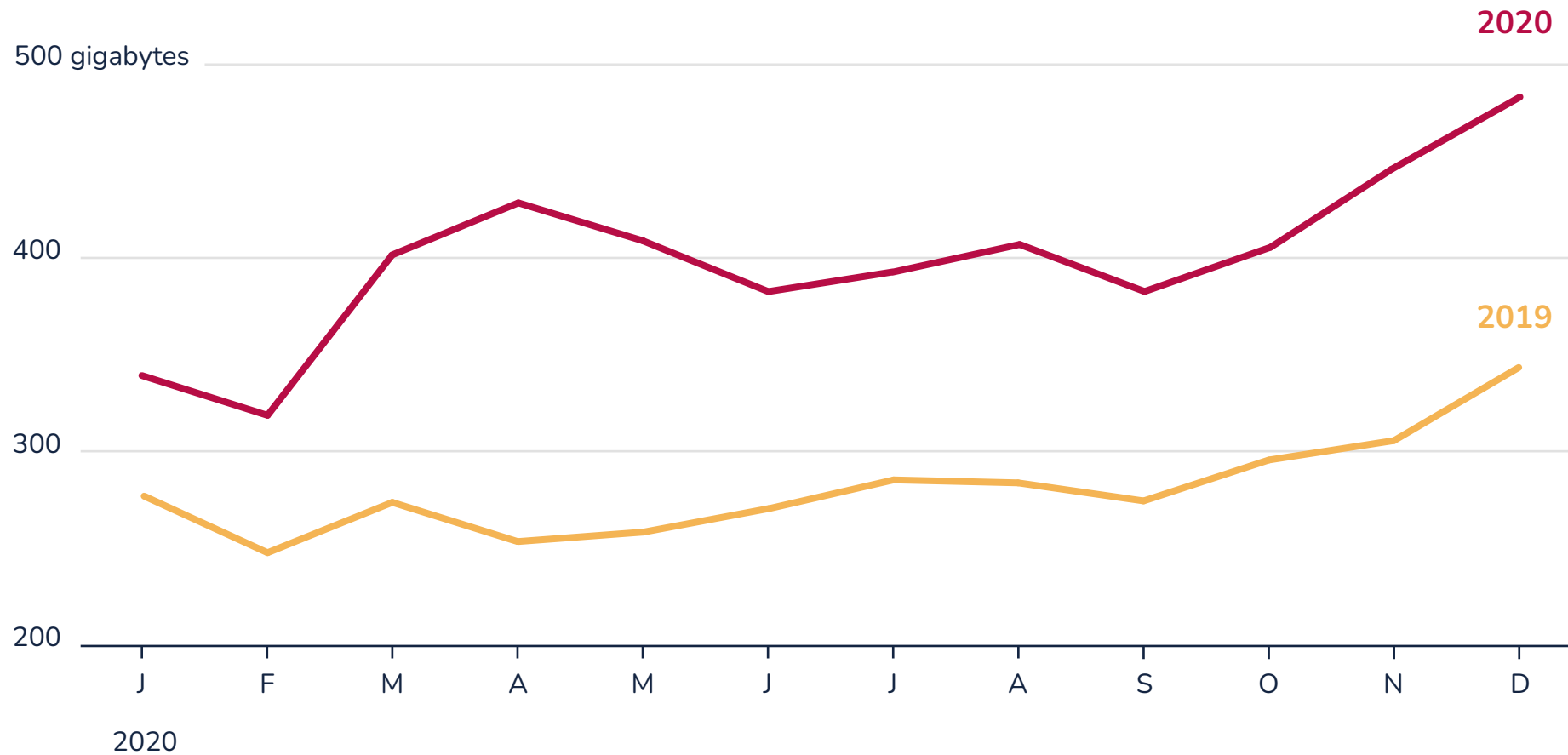


Aligning trends with strategy



Bandwidth Boom

Average monthly broadband use per household



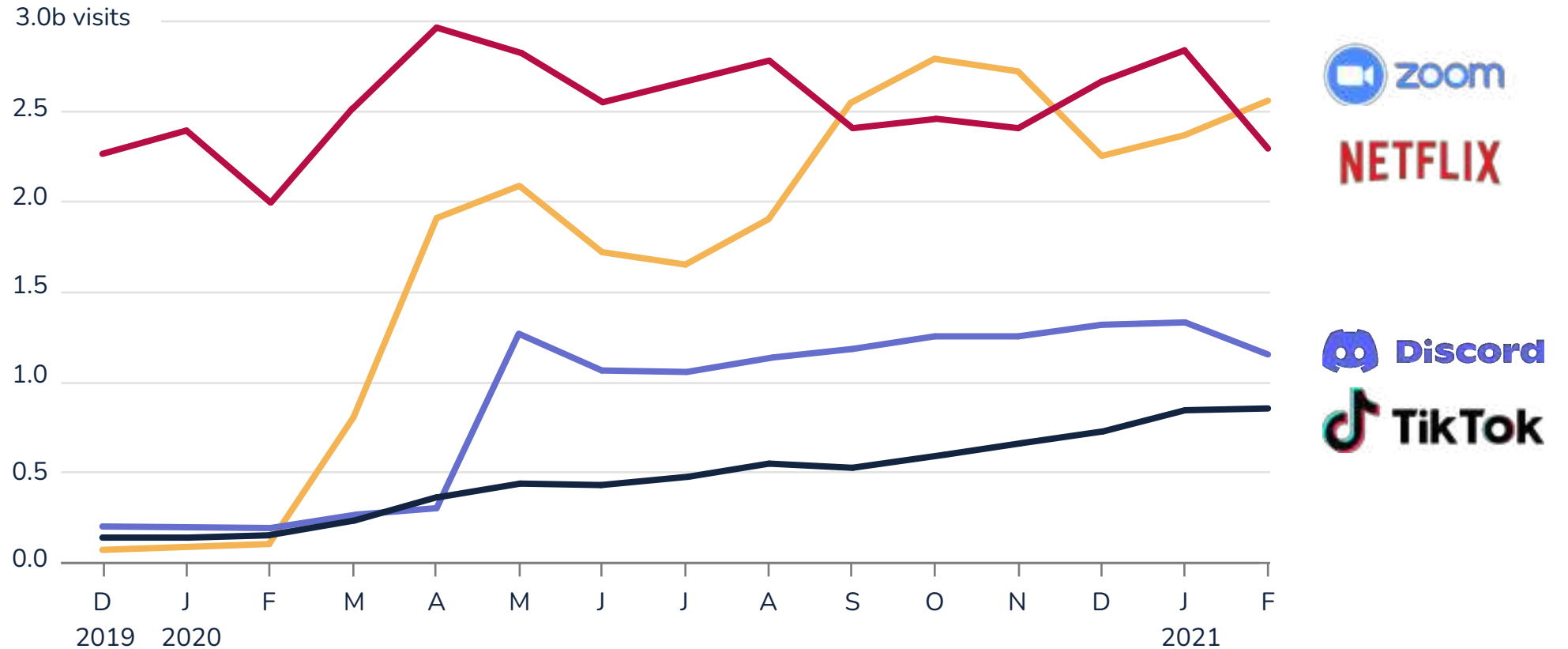
Notes: Usage statistics from broadband providers that are customers of OpenVault.

Source: OpenVault.



Life moves online

Average monthly web visits, worldwide



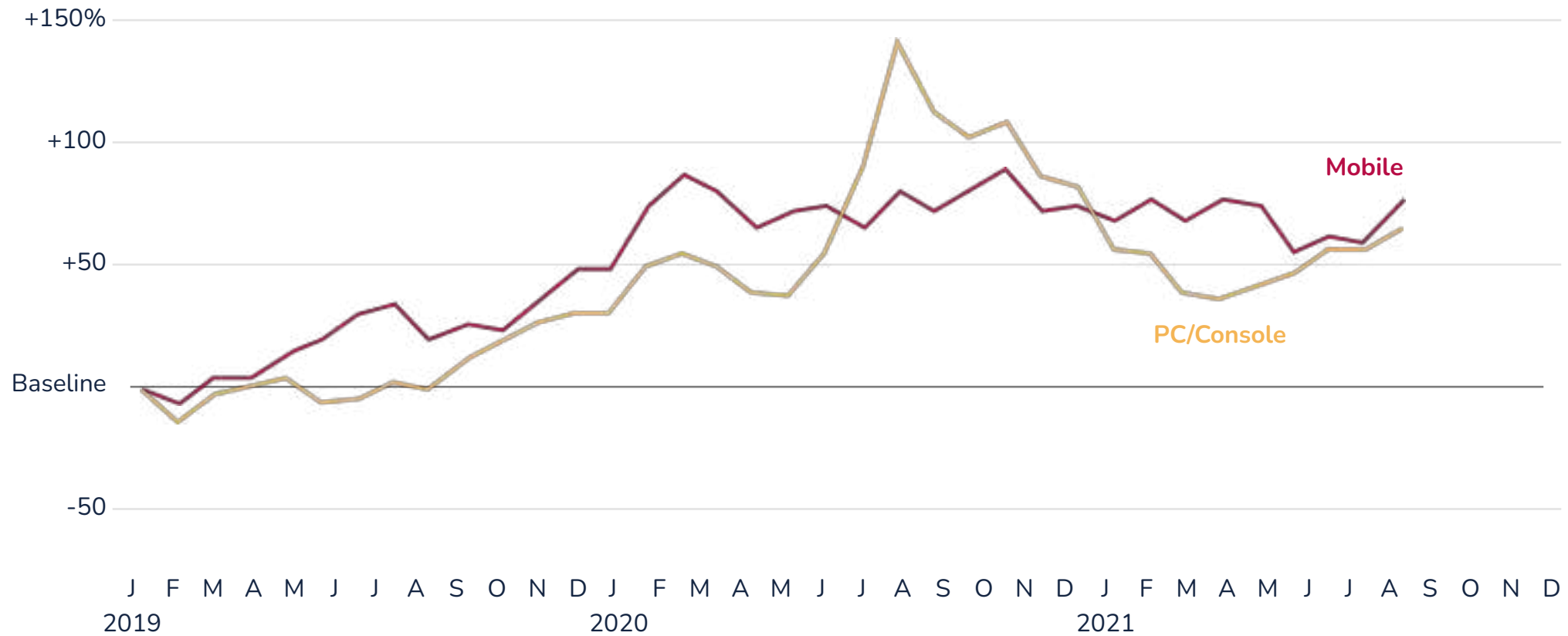
Notes: Does not include apps
Source: SimilarWeb



Discord

The Gaming Boom Abates

Percentage change in daily active users playing games developed with Unity software



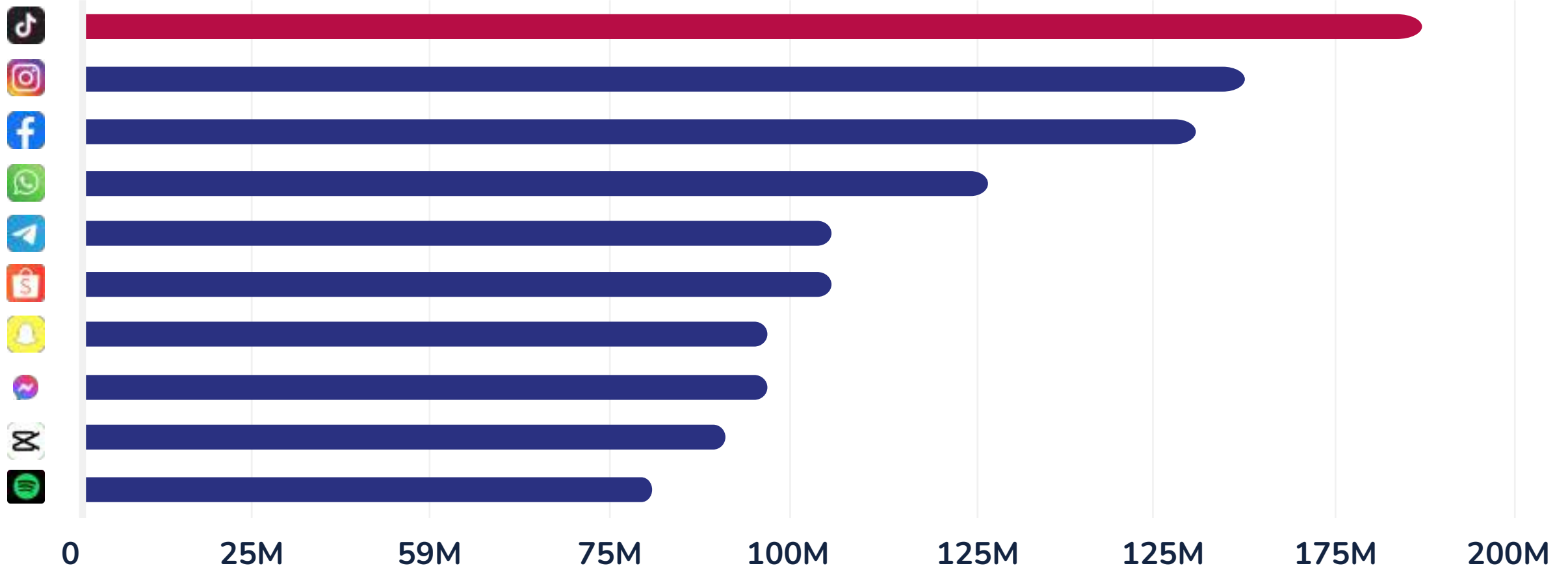
Notes: Baseline estimated from first measured month, jan. 2019

Source: Unity



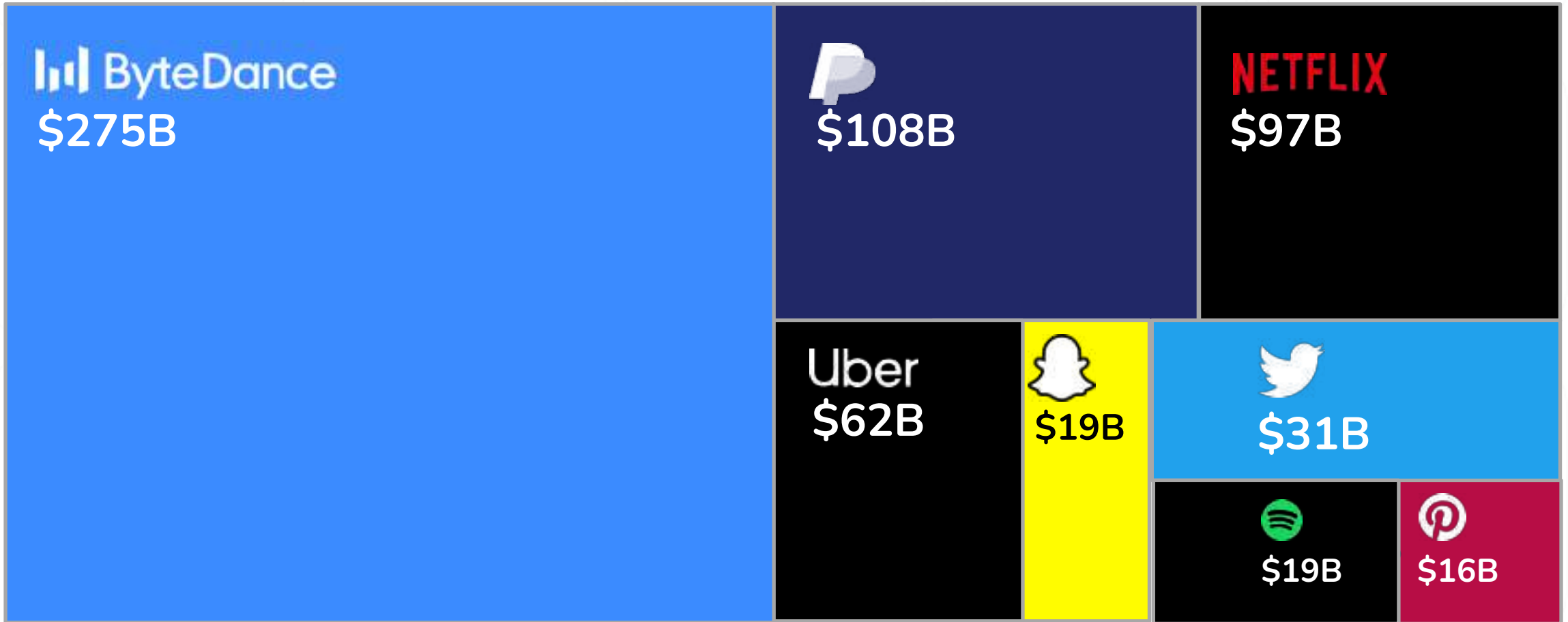
Global App Downloads

Q 22



ByteDance Valuation vs. Other Company Market Caps

May '22



Content Development Cost

2022E



Tiktok Creator Fund

\$200M



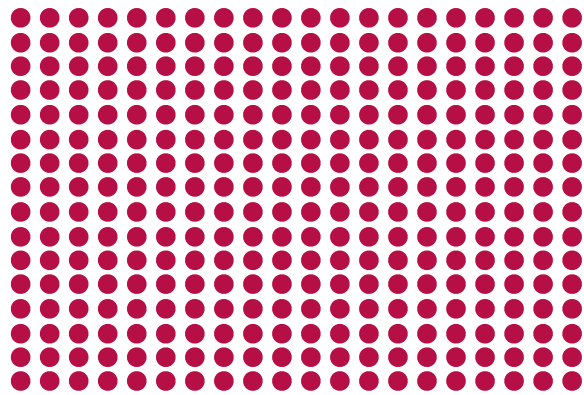
**Netflix Estimated
Original Content Budget**

\$178B

Sources: Tiktok, Financial Times

Talent Pool Ratio: TikTok vs Global Film & TV

Q1 2022



Tiktok Creators



**Global TV &
Film Employees**

Sources: Gwl, Wall Street Journal, Variety

Top Apps by MAU by Likelihood of Use

Gen Z

Represented by:
Aged 16-24



Millennials

Represented by:
Aged 25-44

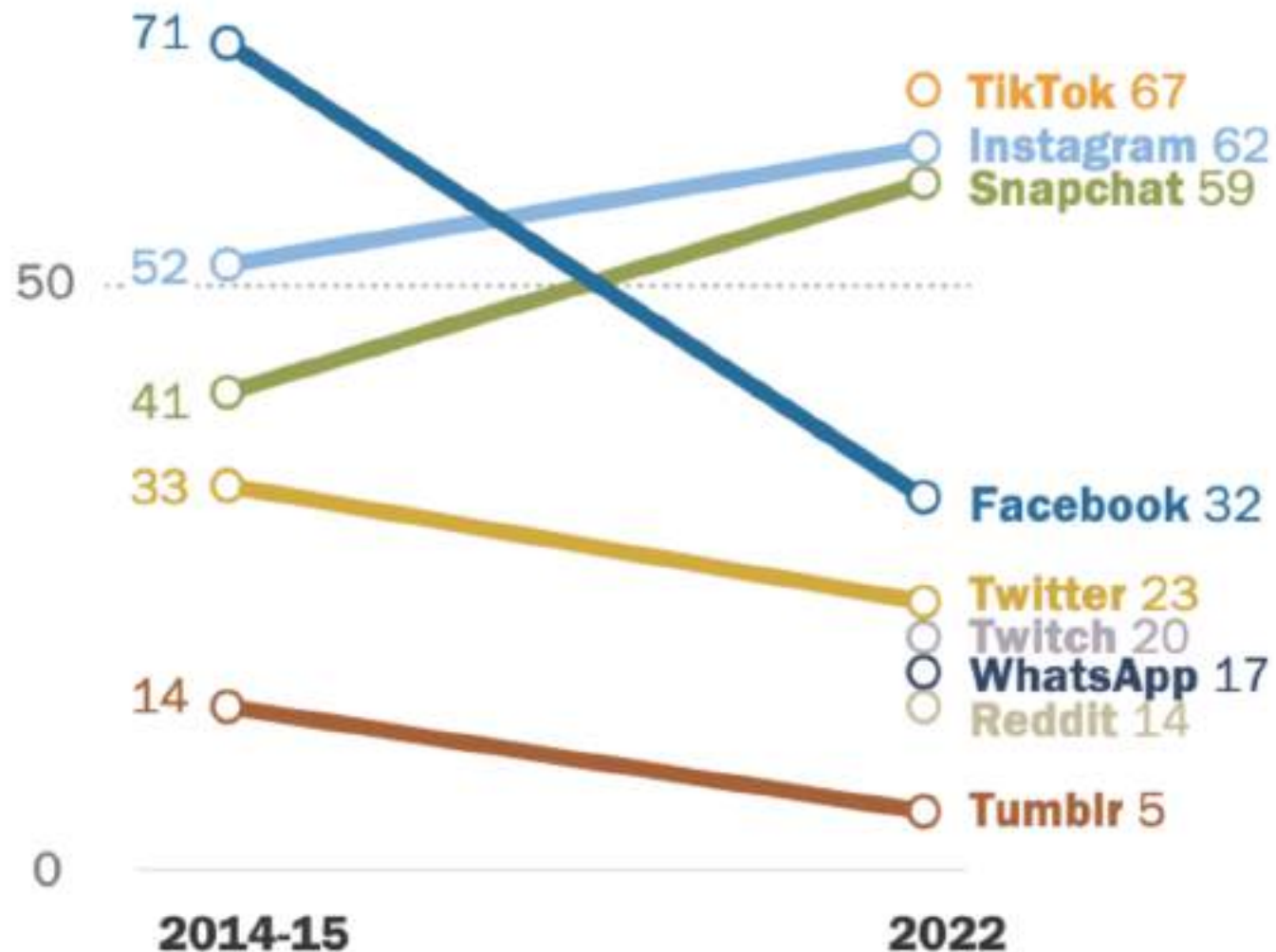


Gen X & Baby
Boomers

Represented by:
Aged 45+



% of U.S. teens who say they ever use any of the following apps or sites

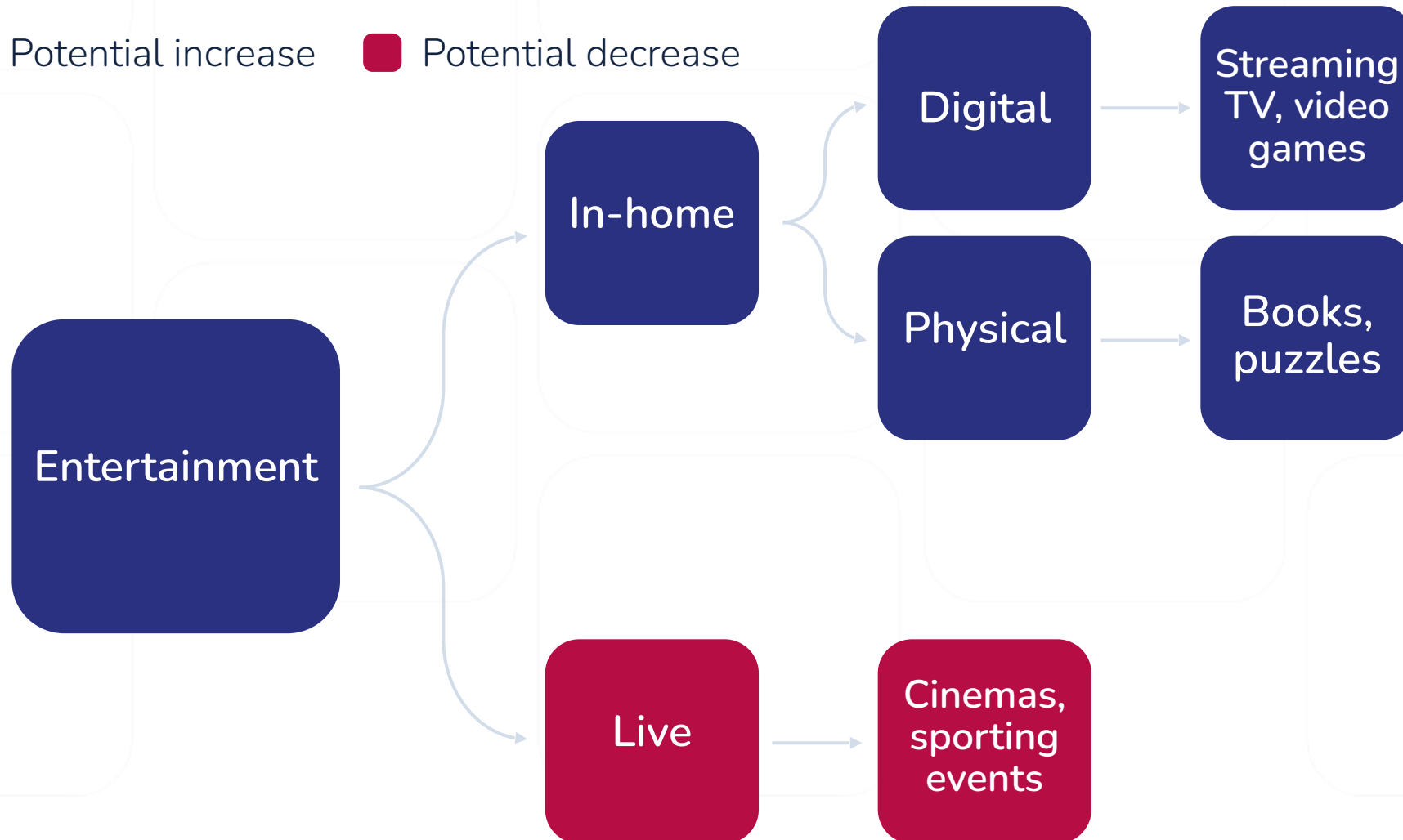


Note: Teens refer to those ages 13 to 17. Those who did not give an answer are not shown. The 2014-15 survey did not ask about YouTube, WhatsApp, Twitch and Reddit. TikTok debuted globally in 2018.
Source: Survey conducted April 14-May 4, 2022.
"Teens, Social Media and Technology 2022"

PEW RESEARCH CENTER

Thinking Through What Lies Ahead

■ Potential increase ■ Potential decrease

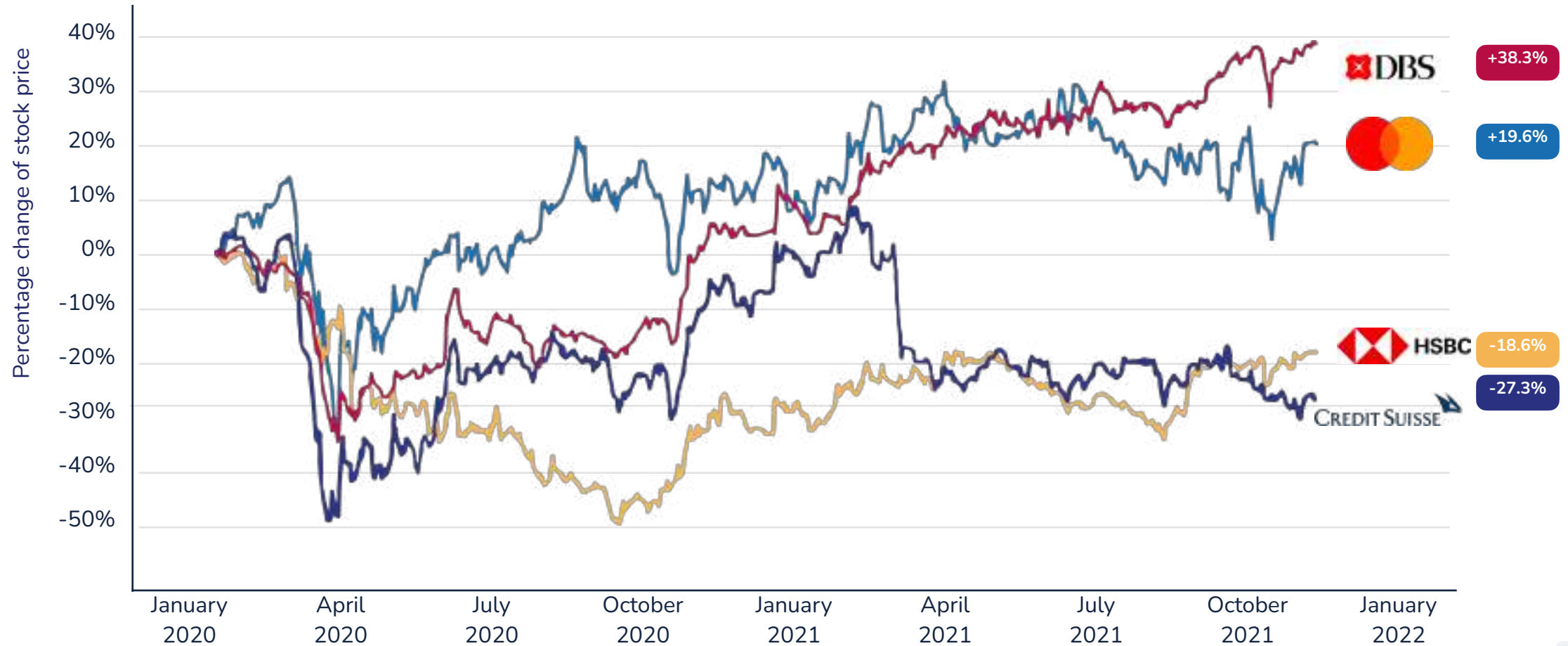


**Some companies
are judged as
having a brighter
future.**

Why?

Percentage change of stock price

Financial Services – January 2020 to January 2022



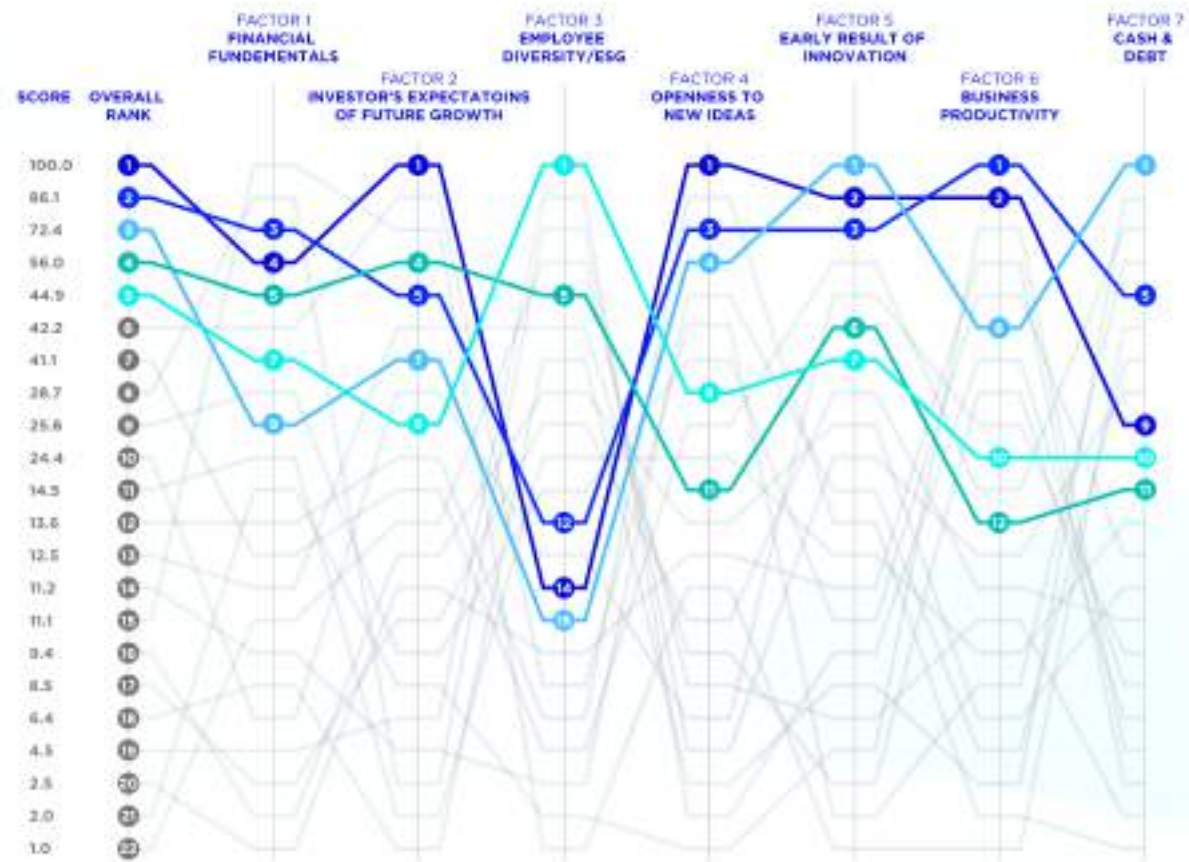
Future Readiness Indicator:

Finance



SCAN ME

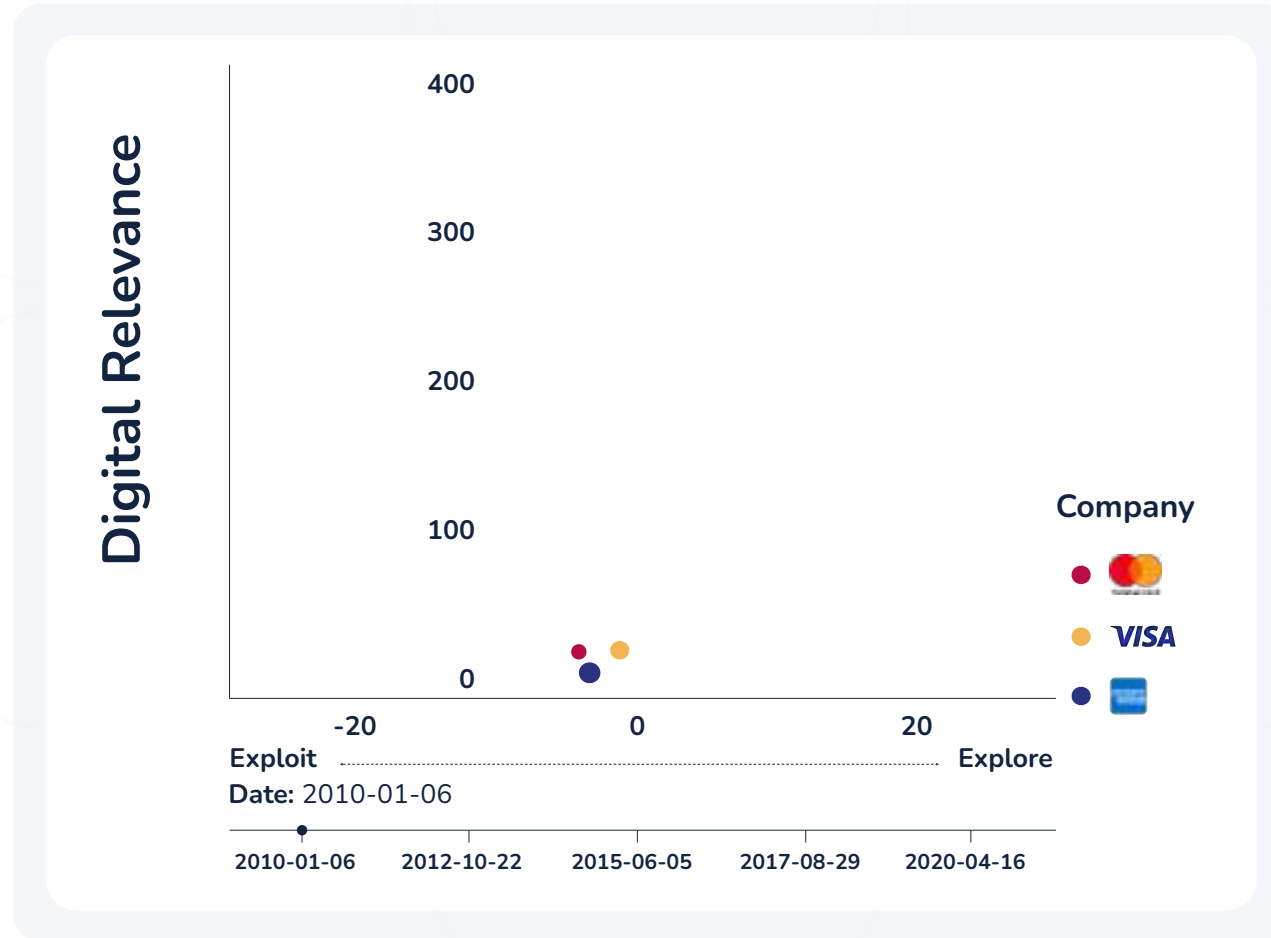
MASTERCARD	100.0
VISA	86.1
JPMORGAN CHASE & COMPANY	72.4
PAYPAL	56.0
DEBS BANK	44.9
BLOCK	42.2
BANK OF AMERICA CORPORATION	41.1
ING GROEP	38.7
CAPITAL ONE	25.6
UBS	24.4
CITI GROUP	14.3
PING AN INSURANCE (GROUP)	13.6
ZURICH INSURANCE	12.5
HSBC	11.2
MERCADO LIBRE	11.1
WELLS FARGO & COMPANY	9.4
ALLIANZ	8.5
NATWEST GROUP	6.4
AXA	4.5
CREDIT SUISSE	2.8
AMERICAN INTERNATIONAL GROUP	2.0
AMERICAN EXPRESS COMPANY	1.0



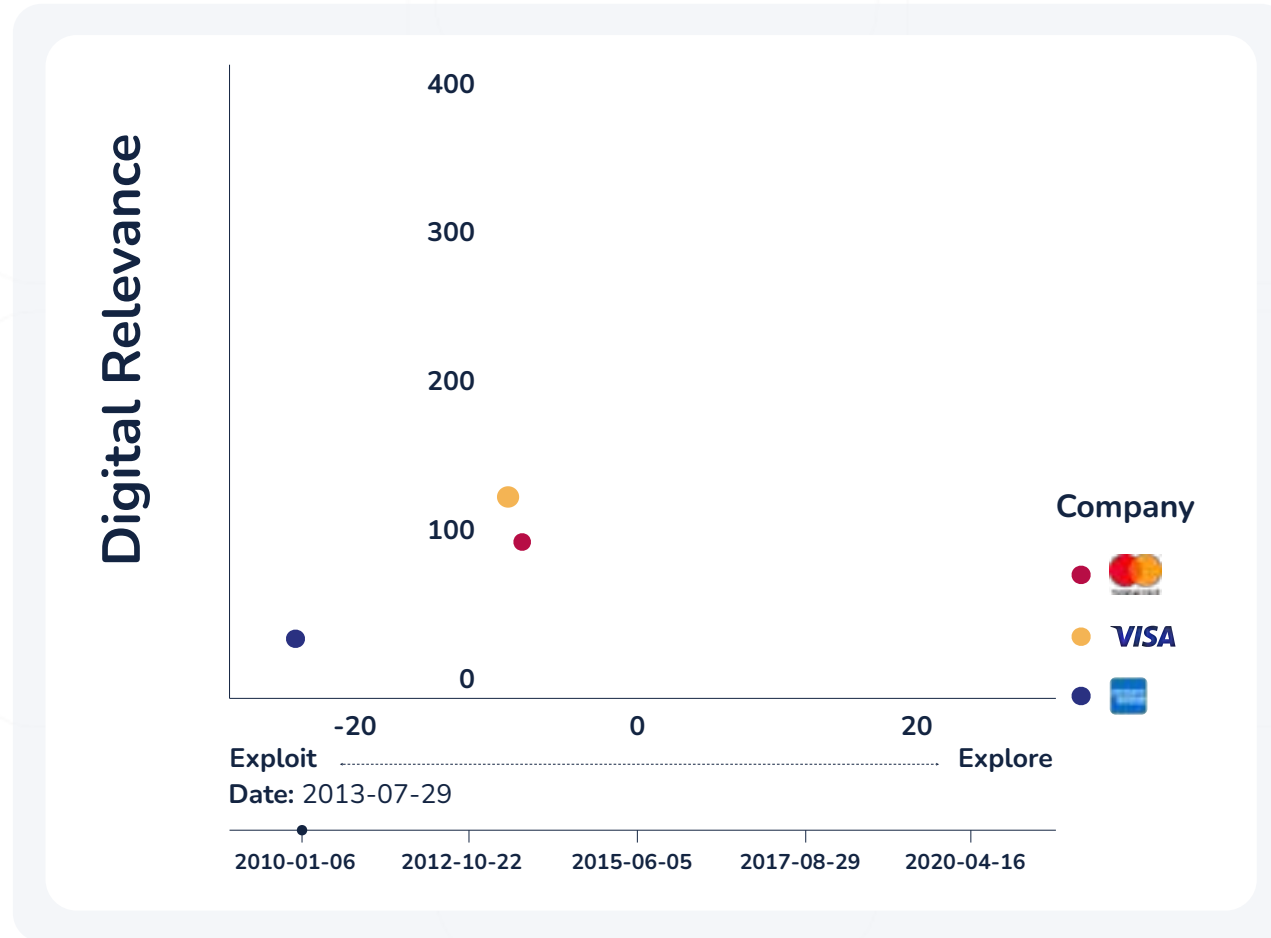


How **Visa** and **Mastercard** become Future-Ready

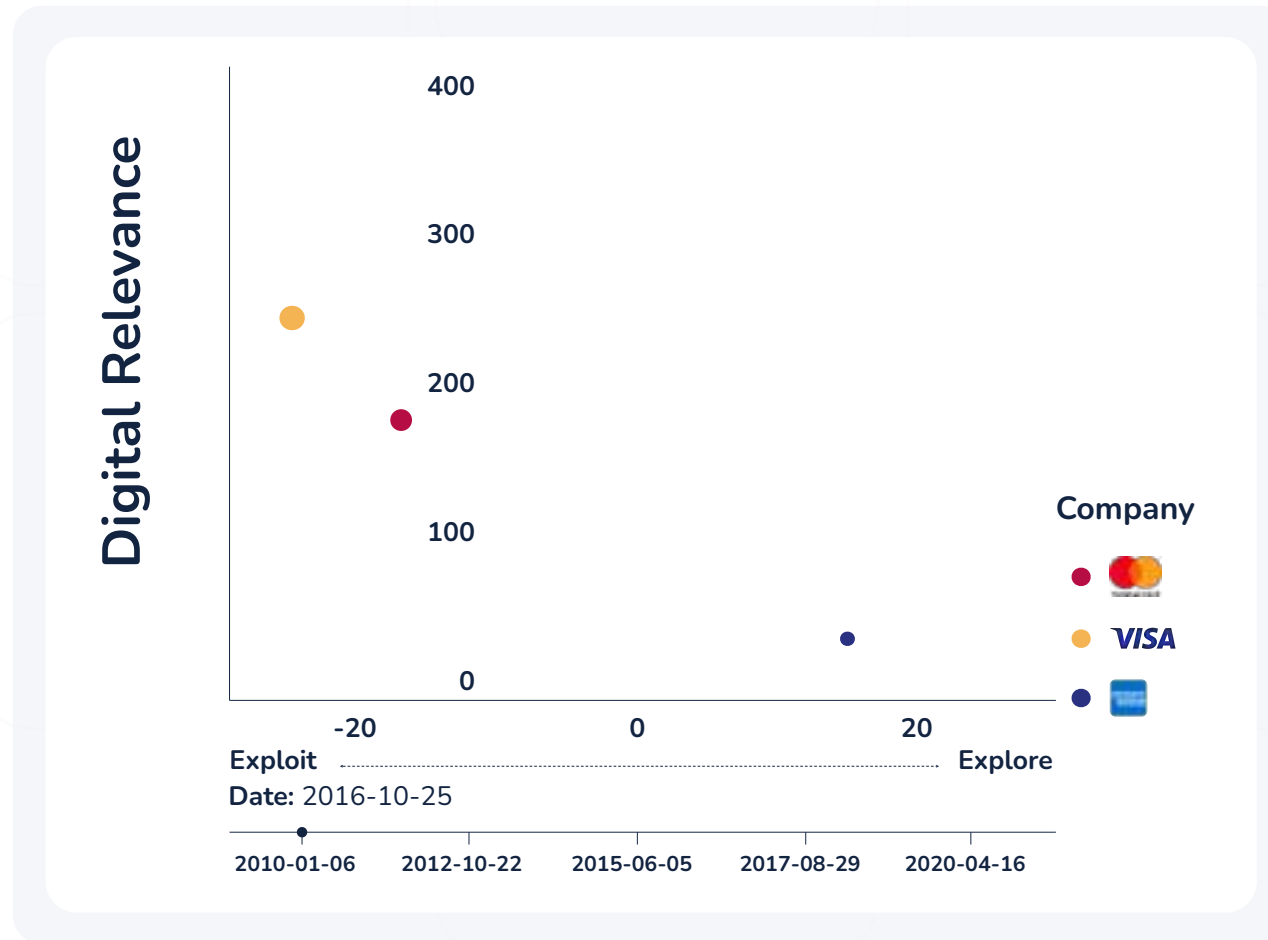
An Epic Race Towards Digital



An Epic Race Towards Digital



An Epic Race Towards Digital



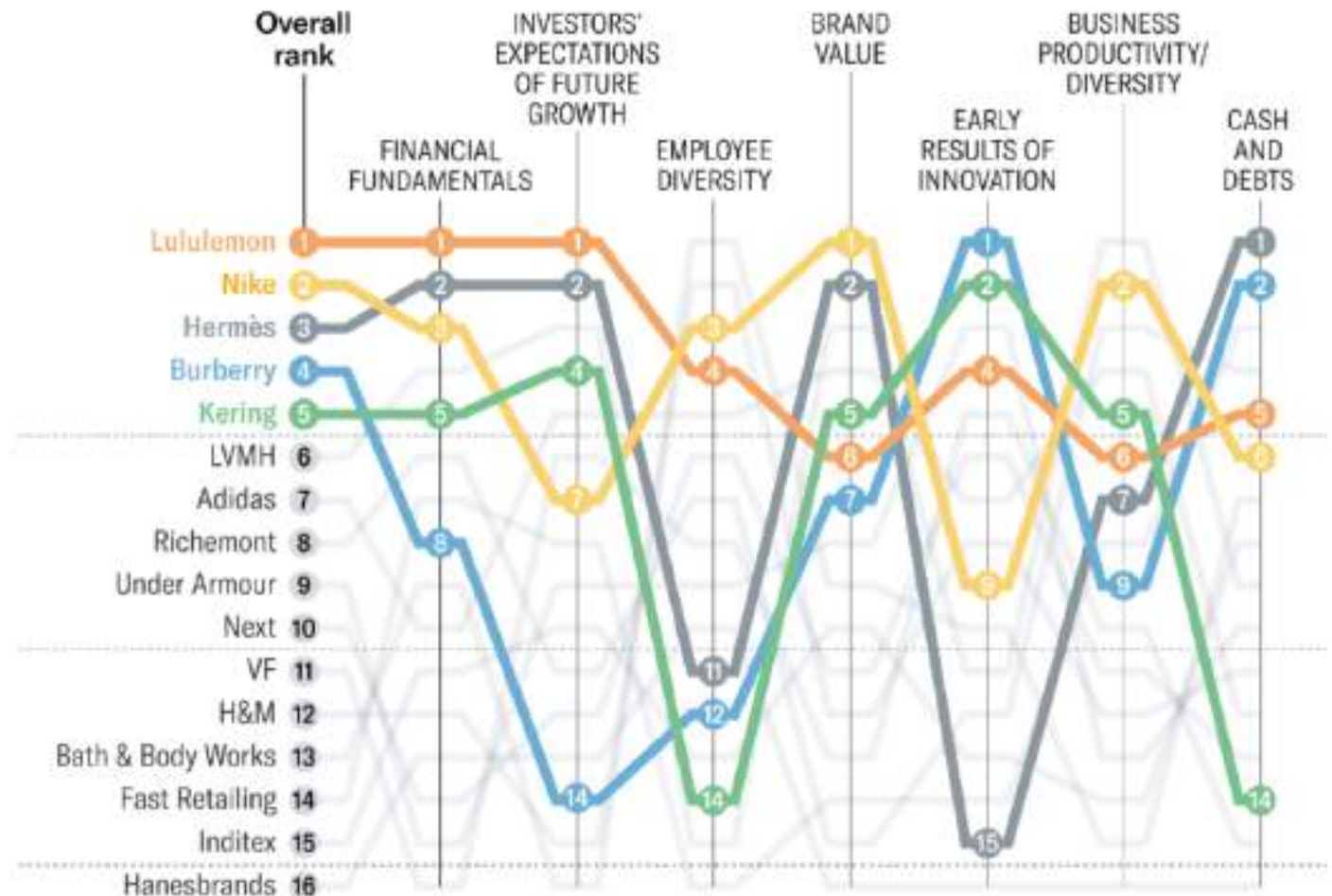
An Epic Race Towards Digital



What is a LEAP?

To exploit a **new**
knowledge discipline,
not just explore.

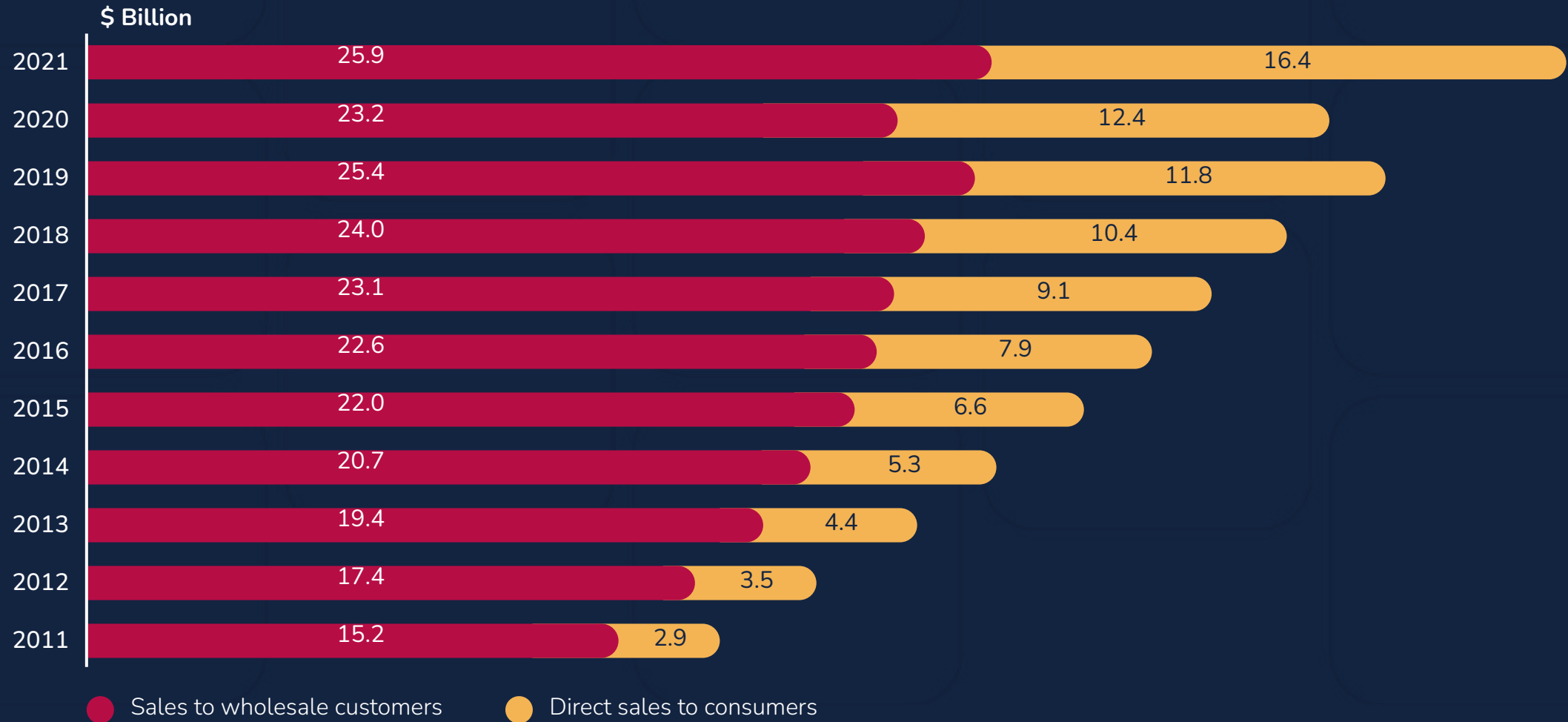
Future Readiness Indicator: Brands and Fashion



Source: International Institute for Management Development Future Readiness Indicator

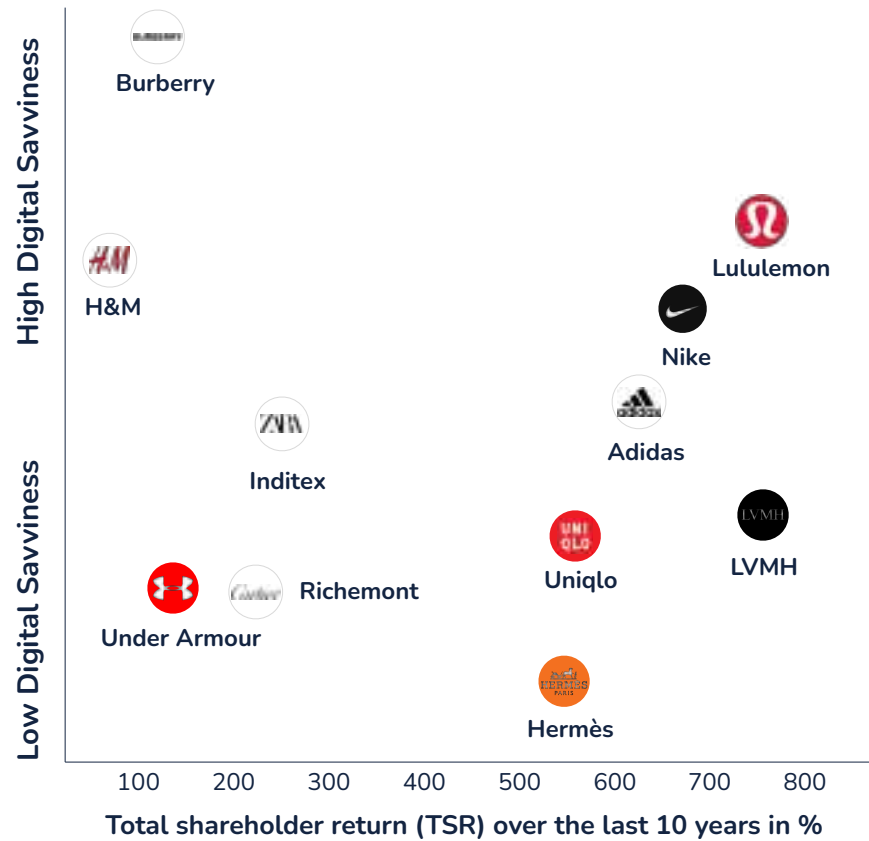


Nike brand global sales by channel

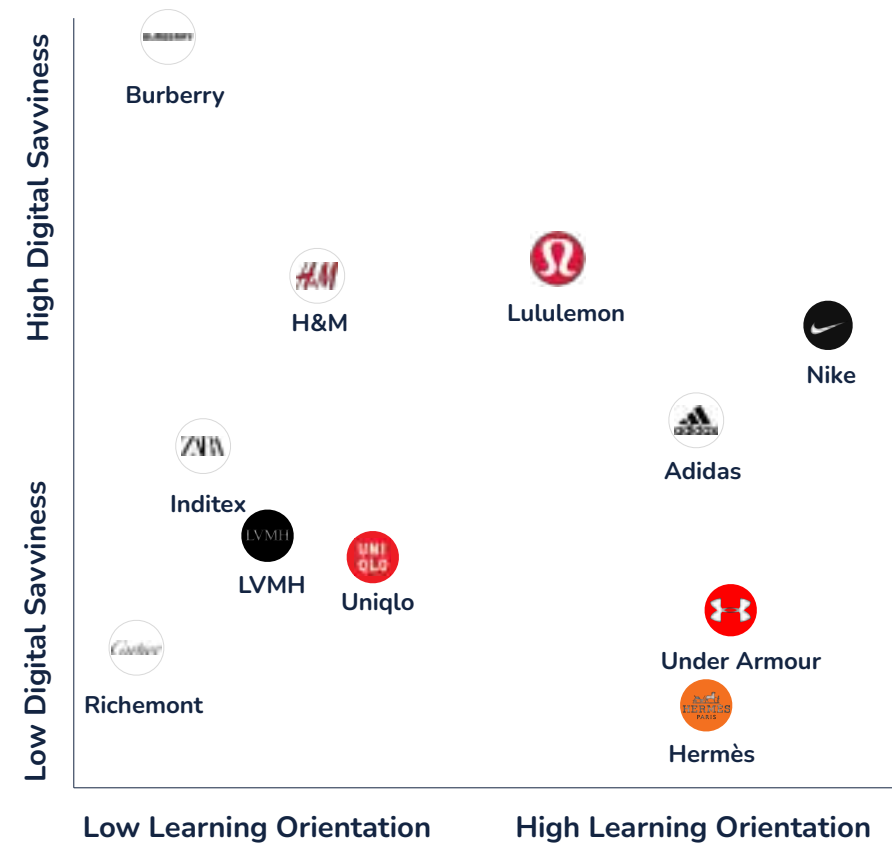




Fashion Brands: Digital vs. TSR

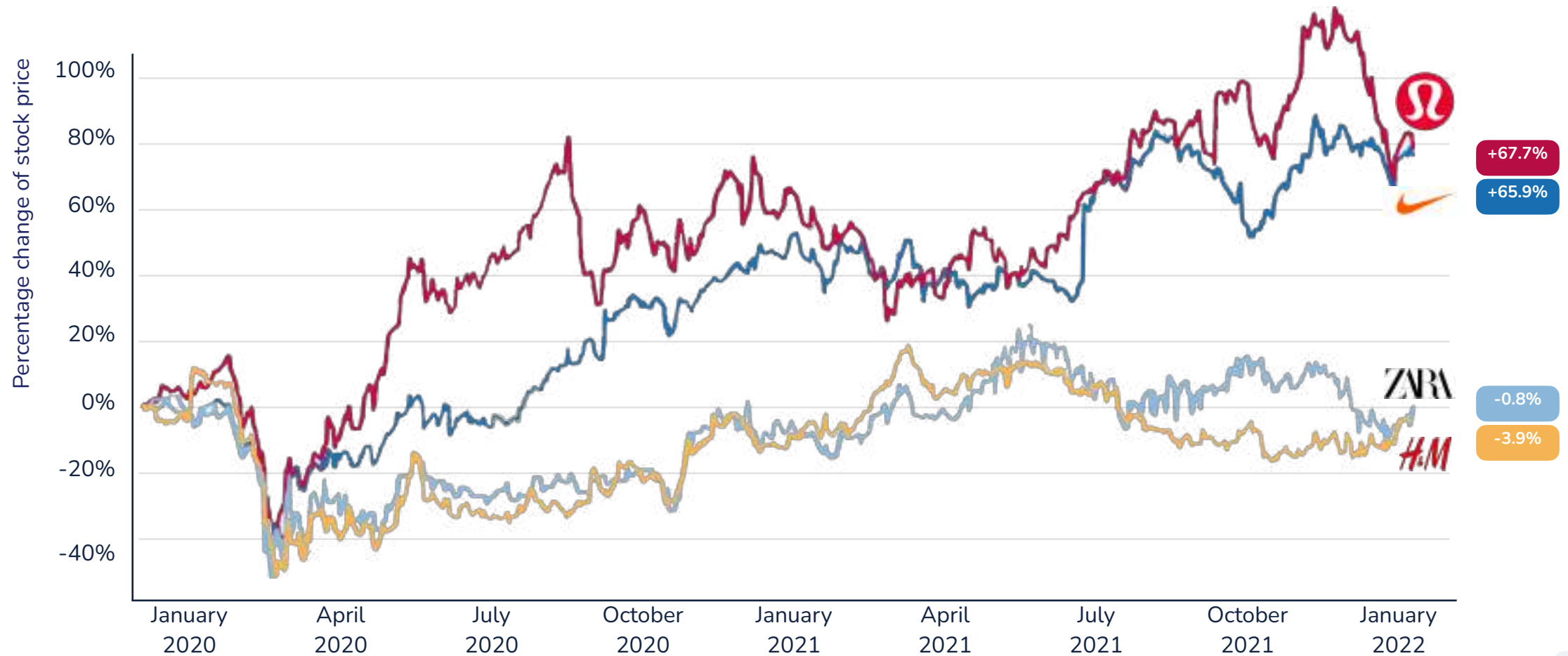


Fashion Brands: Digital vs. Learning Orientation



Percentage change of stock price

Fashion Industry – January 2020 to January 2022



How Can You Become Future Ready?



01

They've leaped ahead of time and ahead of others.

02

Explore and then commit.

03

They embrace industry convergence.

04

They vertically integrate new capabilities while leveraging open standard.

05

As they scale, they develop new tools for customers and scale communities.

06

Being future-ready translates to resilience in time of crisis.

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Thank You!



Howard Yu


LEGO professor of management and innovation at IMD business school. A...



8 - 10 Dec, 2022

Build your future- readiness

A 3-day immersive leadership program to stay relevant for Gen Z and become future ready

 Château de Herces, Paris, France