

Dark Clouds Gathering?

SMU Cox CEO Sentiment Survey
2015 Results

Survey Content

- Past Performance
- Economic Outlook
- Perceptions of DFW area
- Leadership Issues

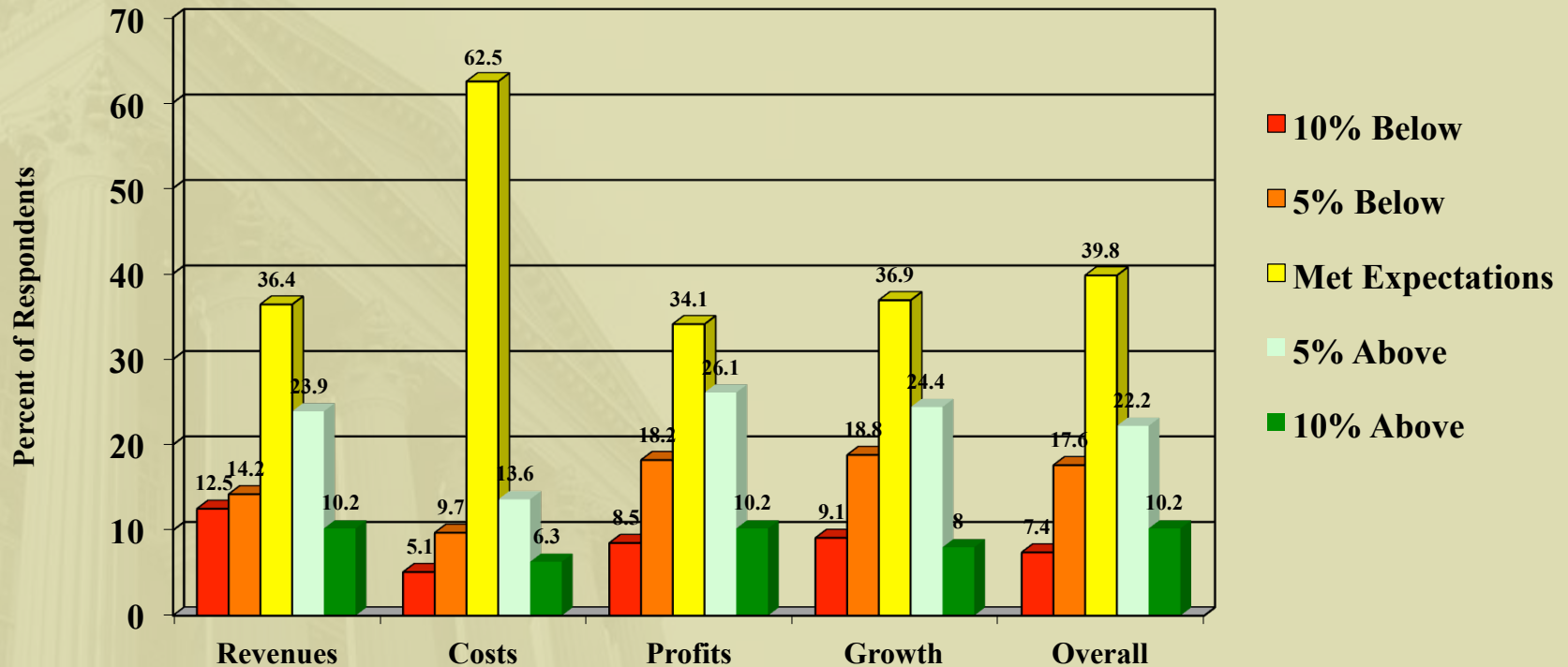


What happened this year...

- Oil prices tumbled
- China's growth slowed
- Volkswagen emissions scandal
- Migrant crisis in Europe
- Iran nuclear deal
- US Presidential elections heat up
- Fed rate hike uncertainty



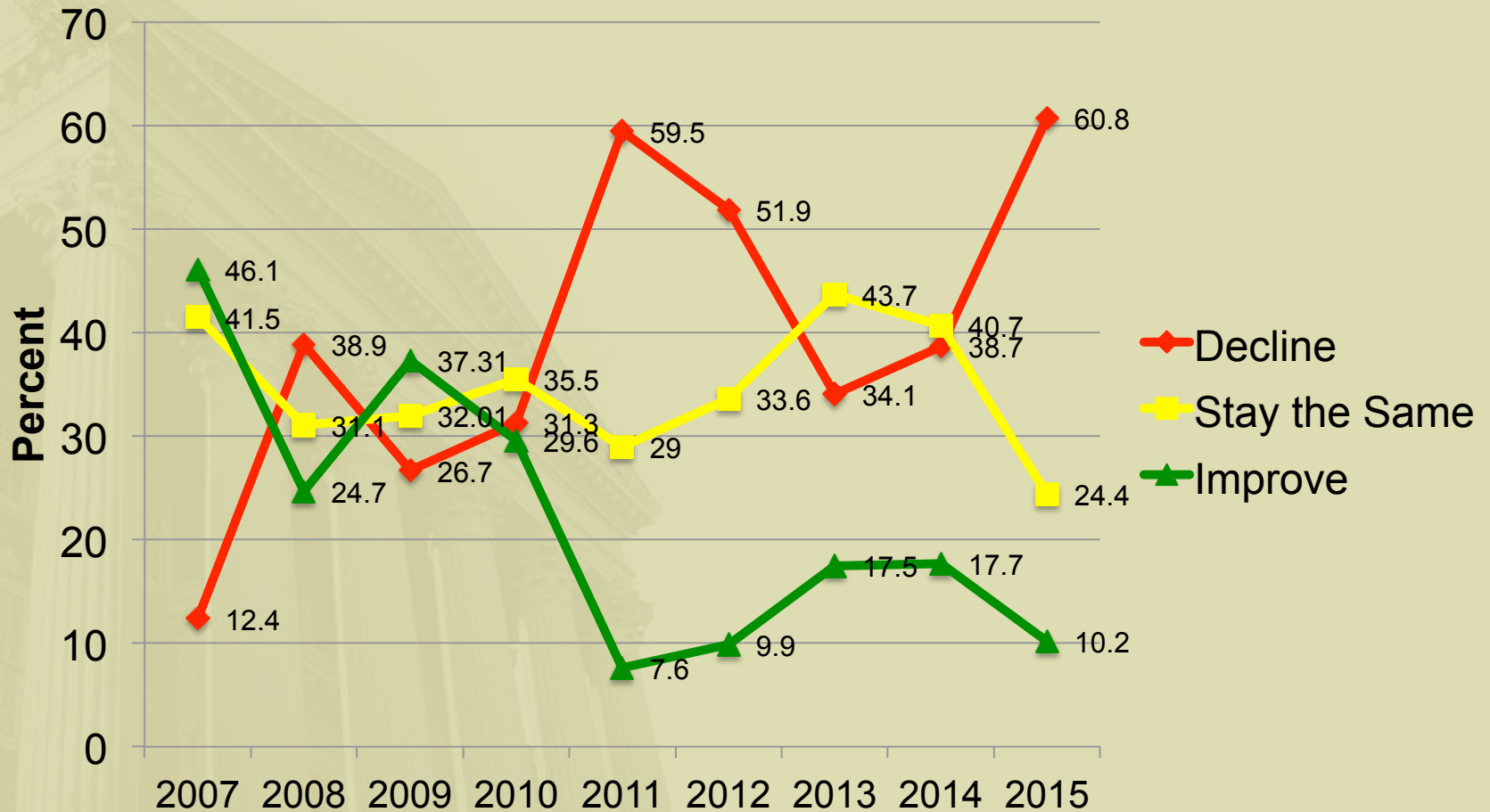
Performance Against 2014 Expectations



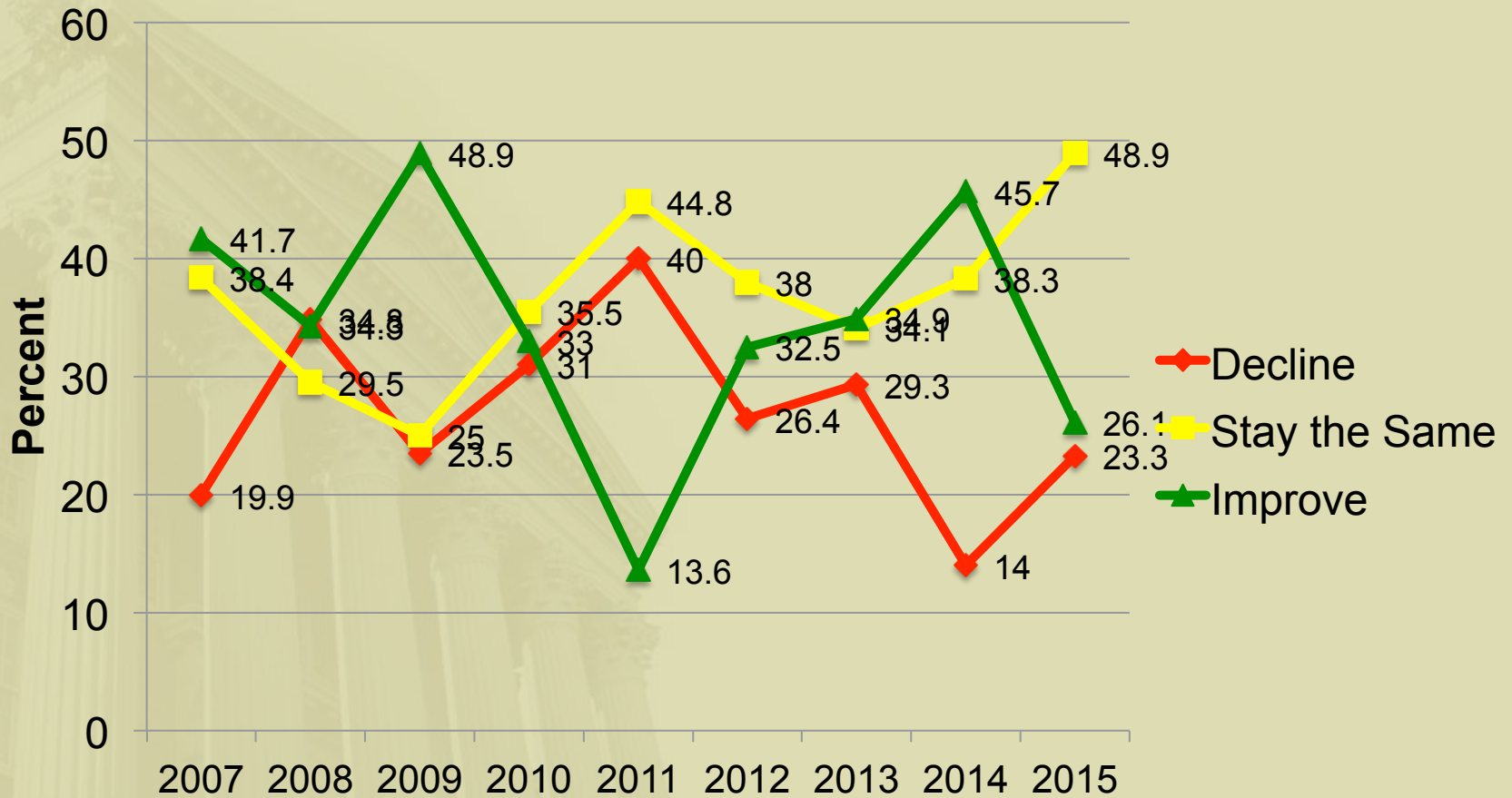
Economic Outlook

SMU Cox CEO Sentiment Survey

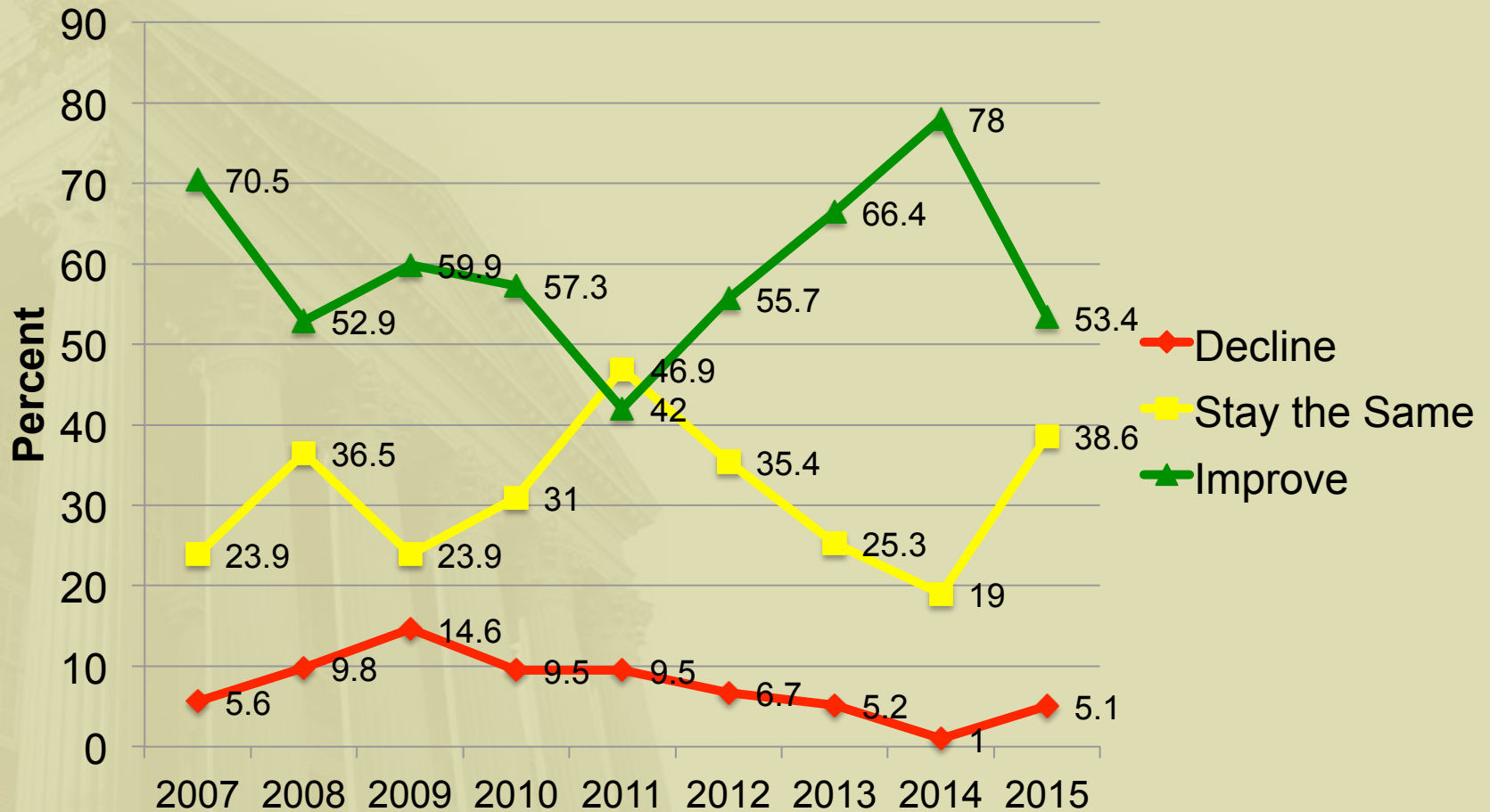
World Economic Outlook



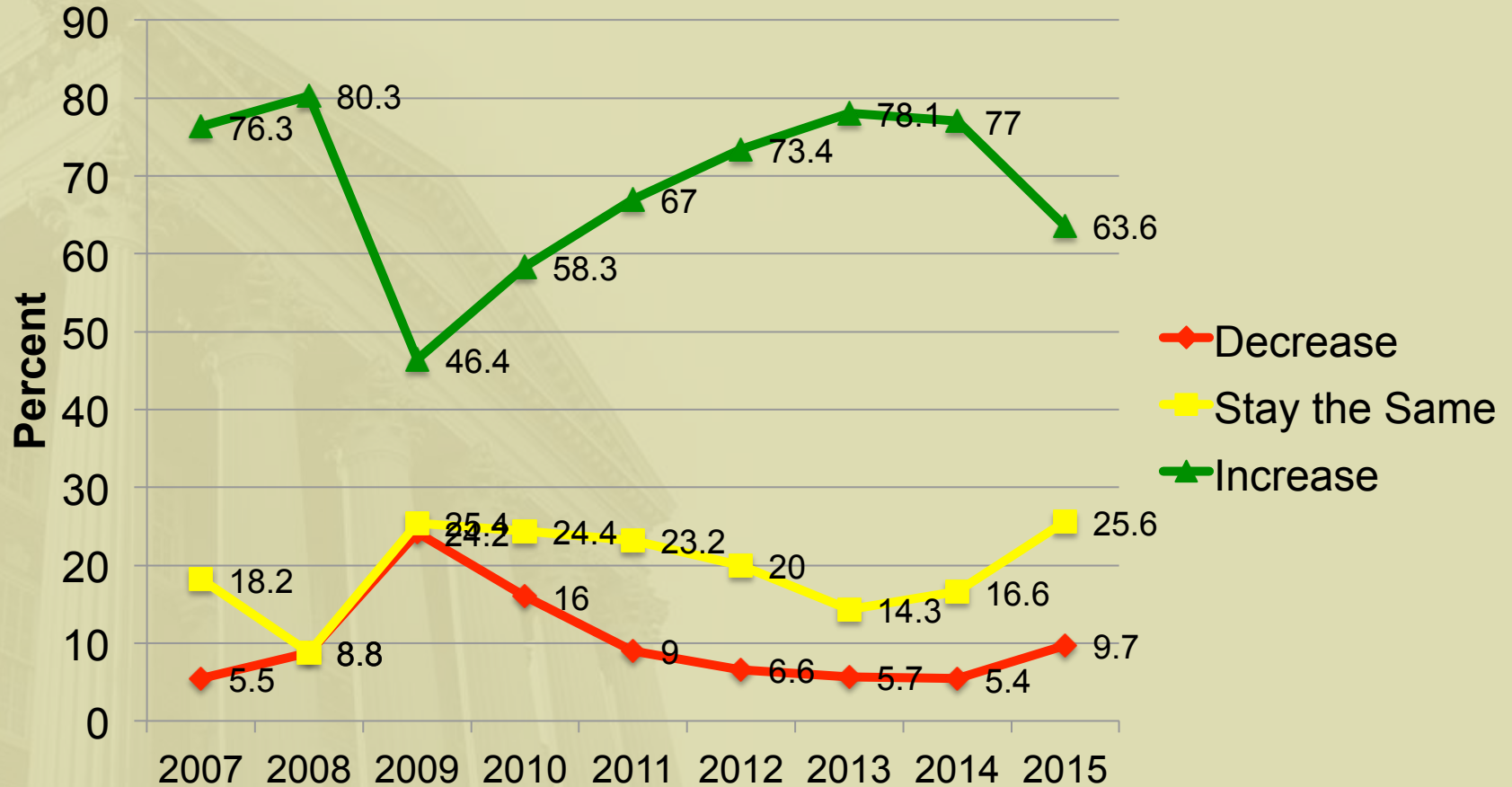
United States Economic Outlook



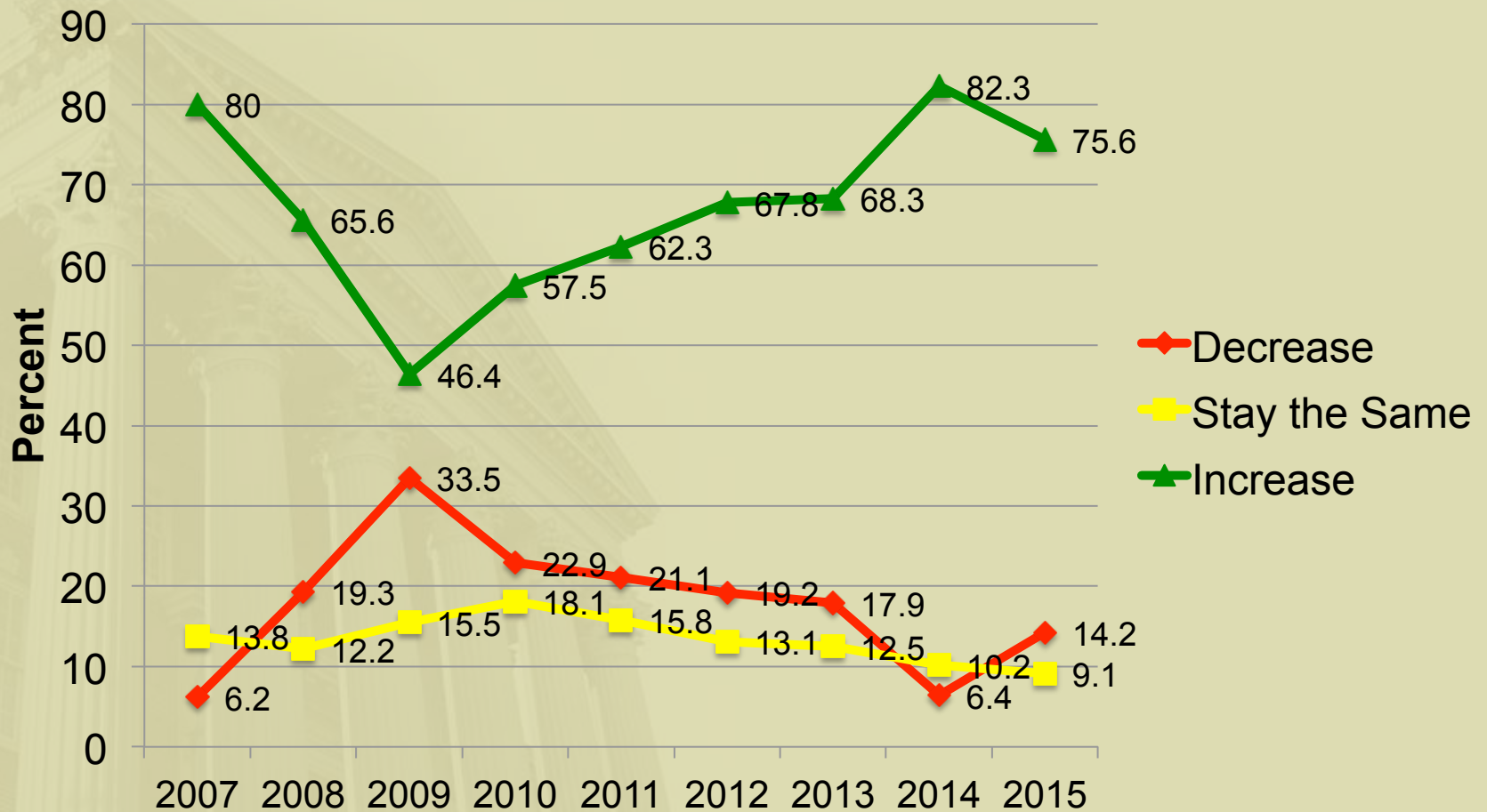
DFW Area Economic Outlook



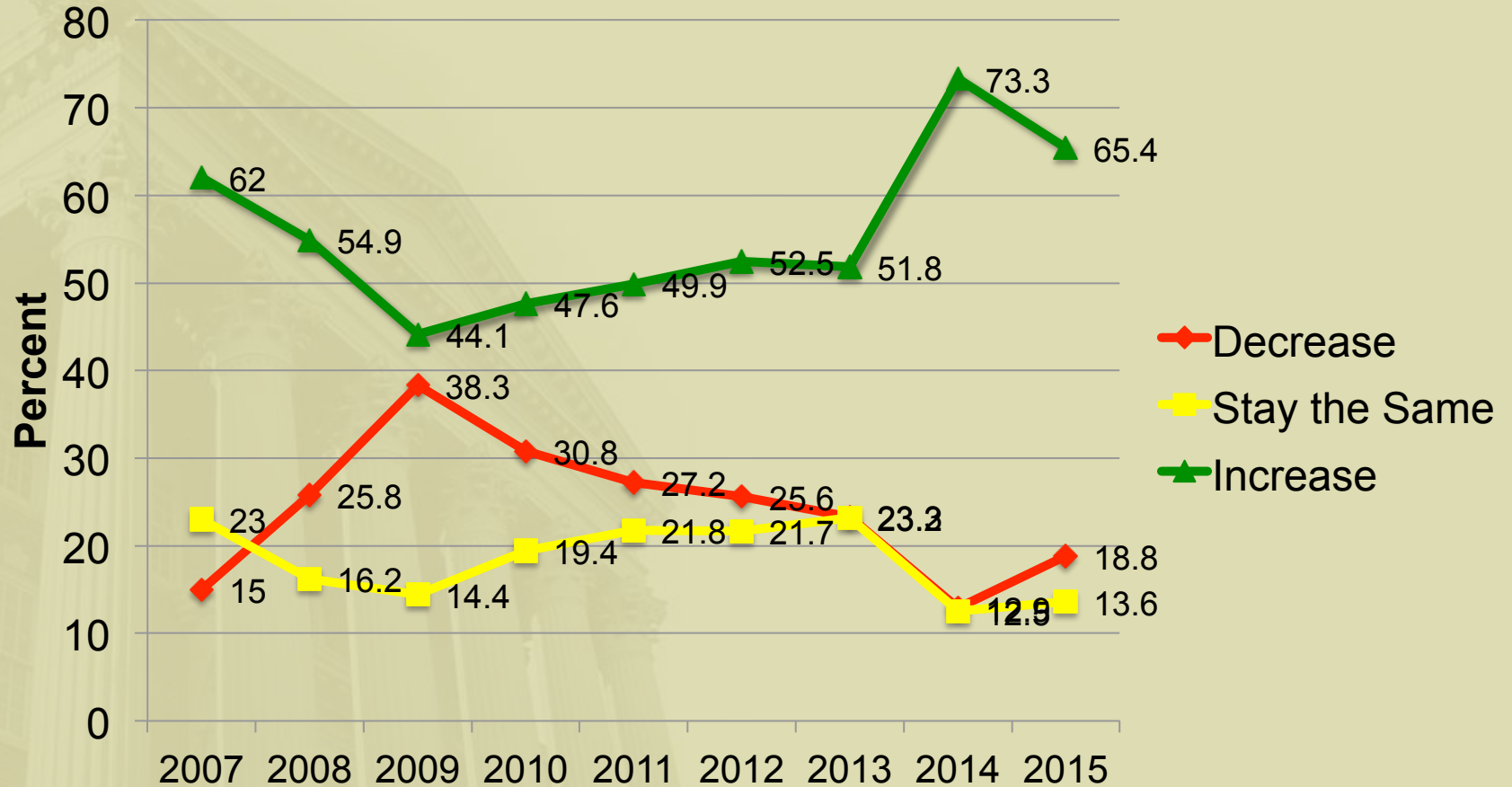
Organizational Costs



Revenues



Profits



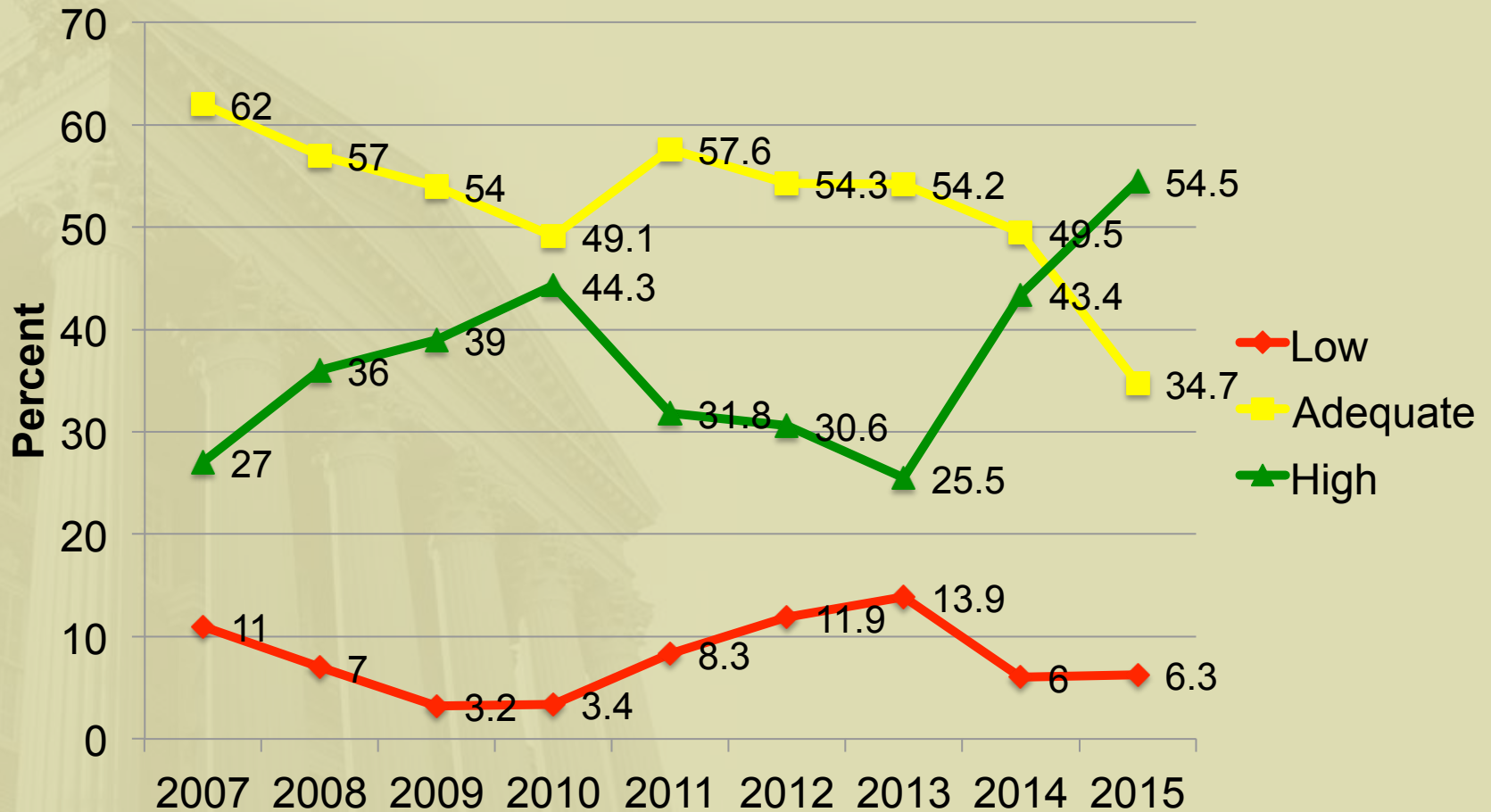
Geographic Market Representing Best Growth Opportunity for Organization

Market	% Selecting
Dallas/Fort Worth	33.0
Other U.S. Regions	23.3
India	.6
Latin America	.6
South America	.6
Western Europe	2.4
China	.6
Southeast Asia	1.1
Middle East	1.1
Other/Multiple	8.1

Perceptions of DFW Area

SMU Cox CEO Sentiment Survey

Quality of DFW Workforce



Contributors to DFW Quality of Life

Characteristic	% Selecting
Cost of Living	64.8
Quality of Travel and Transportation Infrastructure	11.4
Entertainment Opportunities (Professional Sports, Arts)	5.7
Weather/Climate	4.5
Healthcare/Medical Facilities and Resources	2.8
Educational Resources	2.3
Recreational Resources (Parks, Golf Courses, Lakes)	.6

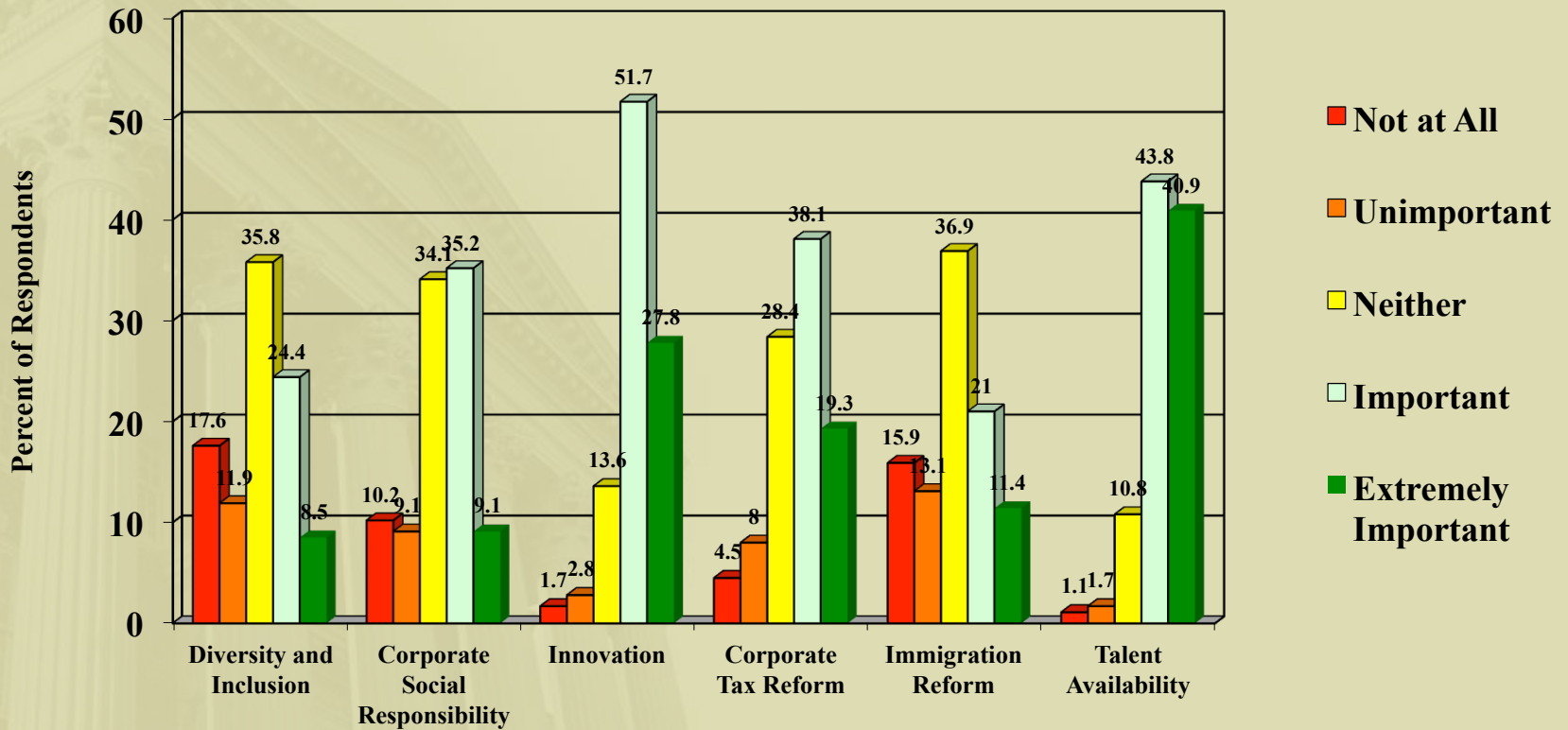
Top Government Actions Needed

Government Action	% Selecting
Improve Public School Education	37.5
Increase Financial Incentives for Business	31.3
Improve Public Transportation	8.0
Control Energy Costs	2.3
Create More Affordable Housing	2.3
Improve Zoning Policies	1.7
Improve Air/Water Quality	.6

Leadership Issues

SMU Cox CEO Sentiment Survey

Importance for Organization's Success



Perceptions of CEO Position

- Job Satisfaction
 - 53% “Very Satisfied”
 - 8% “Somewhat Satisfied”
- Job Security
 - 53% “Very Secure”
 - 13% “Somewhat Secure”
 - 13% “Very Insecure”



What Keeps Them Up at Night



Top business challenges

1. Labor Availability
2. Regulation/Legal Issues
3. Changing Customer Needs

Top 3 challenges as CEO

1. Sustaining competitive advantage
2. Attracting and retaining good employees
3. (Tie) Developing Leaders and Getting Accurate Data for Decision Making

Achieving Success

Top 3 Attributes

1. Sound decision making
2. Strategic thinking
3. Strong ethics

Top 3 Measures of Personal Success

1. Company's success
2. Impact on lives of employees and customers
3. Amount of time spent with loved ones

Most Influential Person

1. Parent
2. Spouse
3. Professional mentor



Most Important Confidant

1. Spouse
2. Friends
3. Chief Financial Officer



Thank You!

Questions, comments or suggestions?

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