KPMG

2019 Global CEO Outlook: Resultados de Chile

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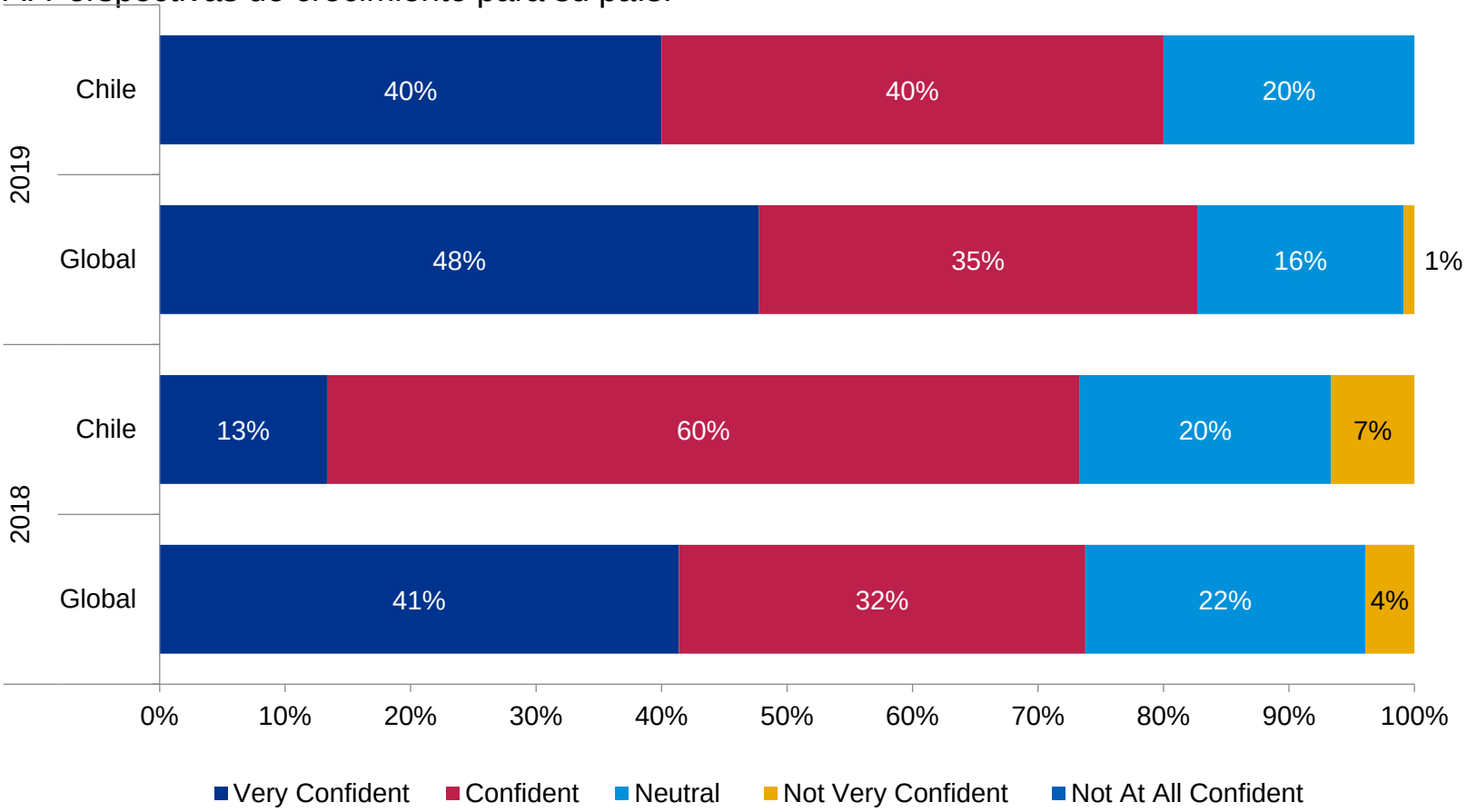
Perspectiva económica y confianza empresarial.

Perspectiva económica y confianza empresarial.

Q1. En cuanto a las perspectivas de crecimiento (para el país donde tiene su sede su empresa), indique su nivel de confianza en los siguientes 3 años:

A. Perspectivas de crecimiento para su país.



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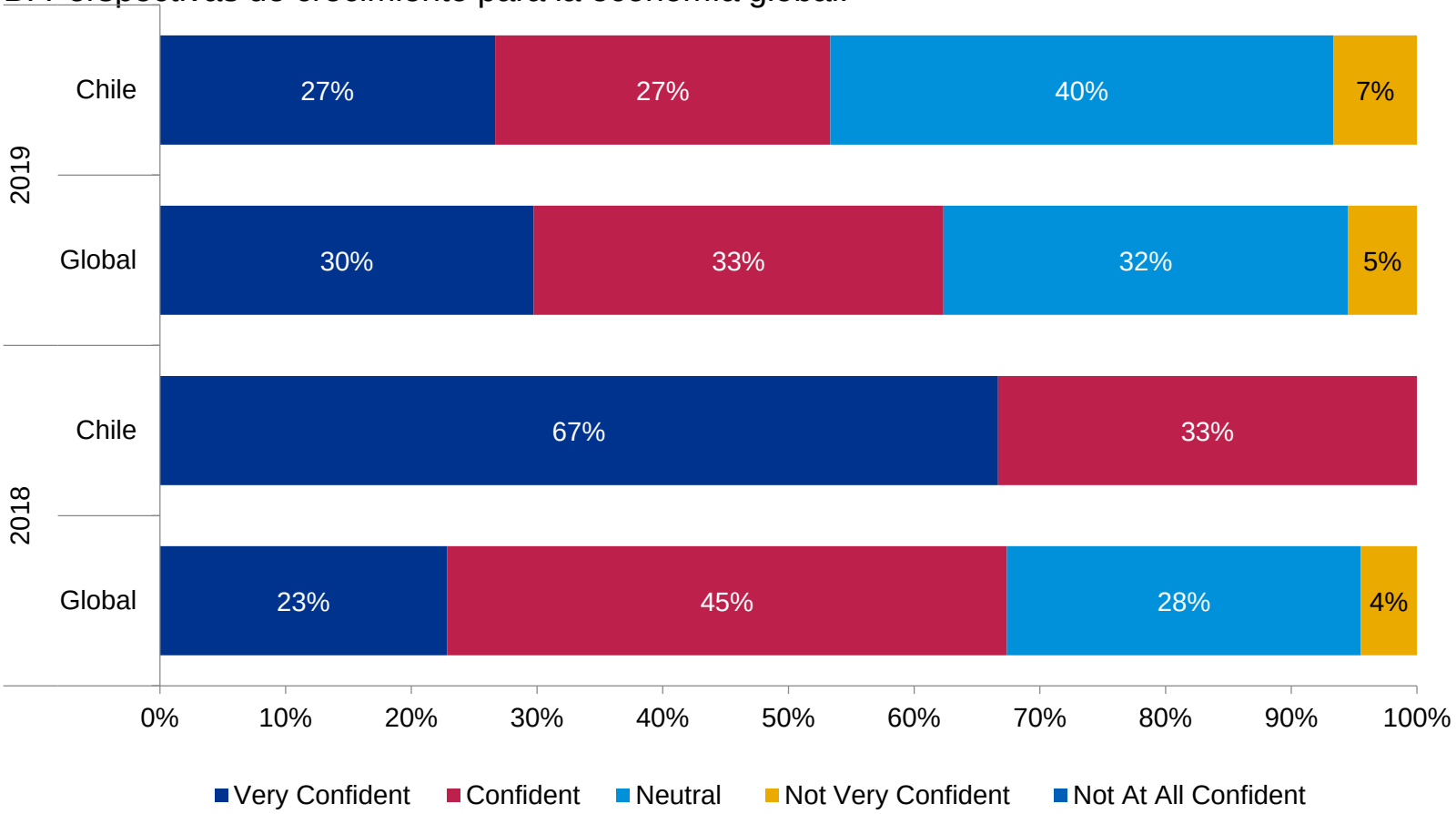
Perspectiva económica y confianza empresarial.

Q1. En cuanto a las perspectivas de crecimiento (para el país donde tiene su sede su empresa), indique su nivel de confianza en los siguientes 3 años:

B. Perspectivas de crecimiento para la economía global.



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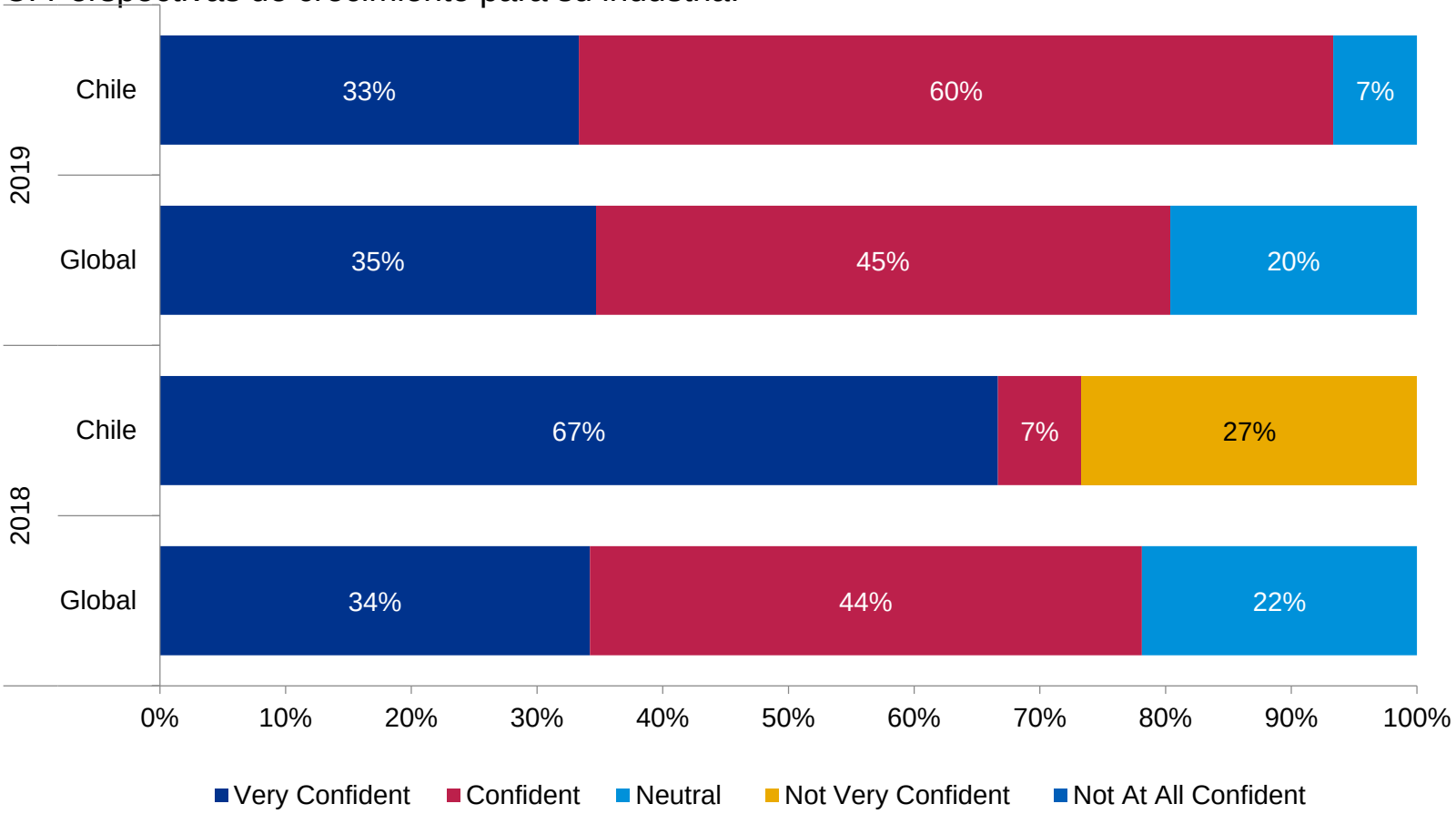
Perspectiva económica y confianza empresarial.

Q1. En cuanto a las perspectivas de crecimiento (para el país donde tiene su sede su empresa), indique su nivel de confianza en los siguientes 3 años:

C. Perspectivas de crecimiento para su industria.



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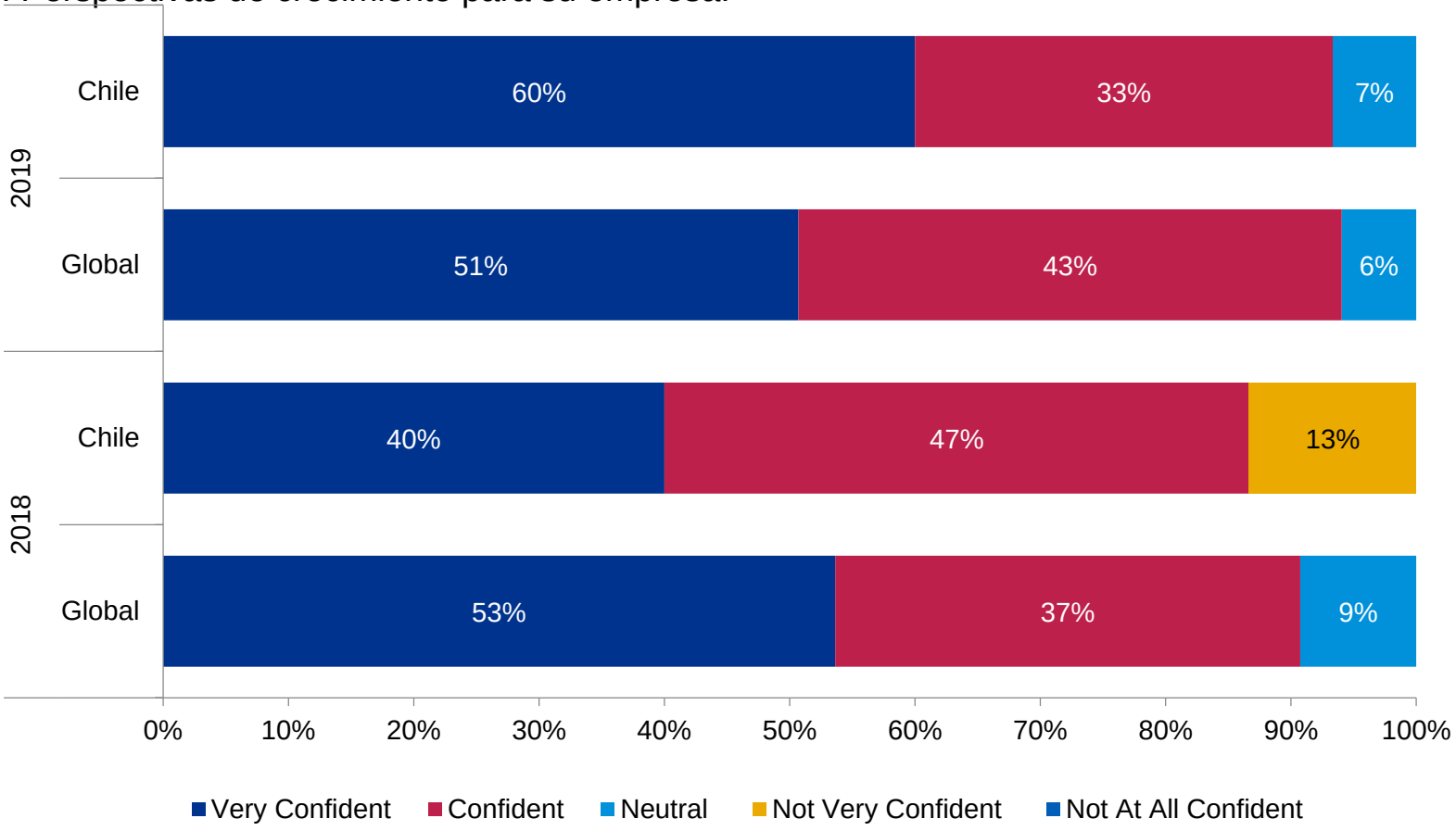
Perspectiva económica y confianza empresarial.

Q1. En cuanto a las perspectivas de crecimiento (para el país donde tiene su sede su empresa), indique su nivel de confianza en los siguientes 3 años:

D. Perspectivas de crecimiento para su empresa.



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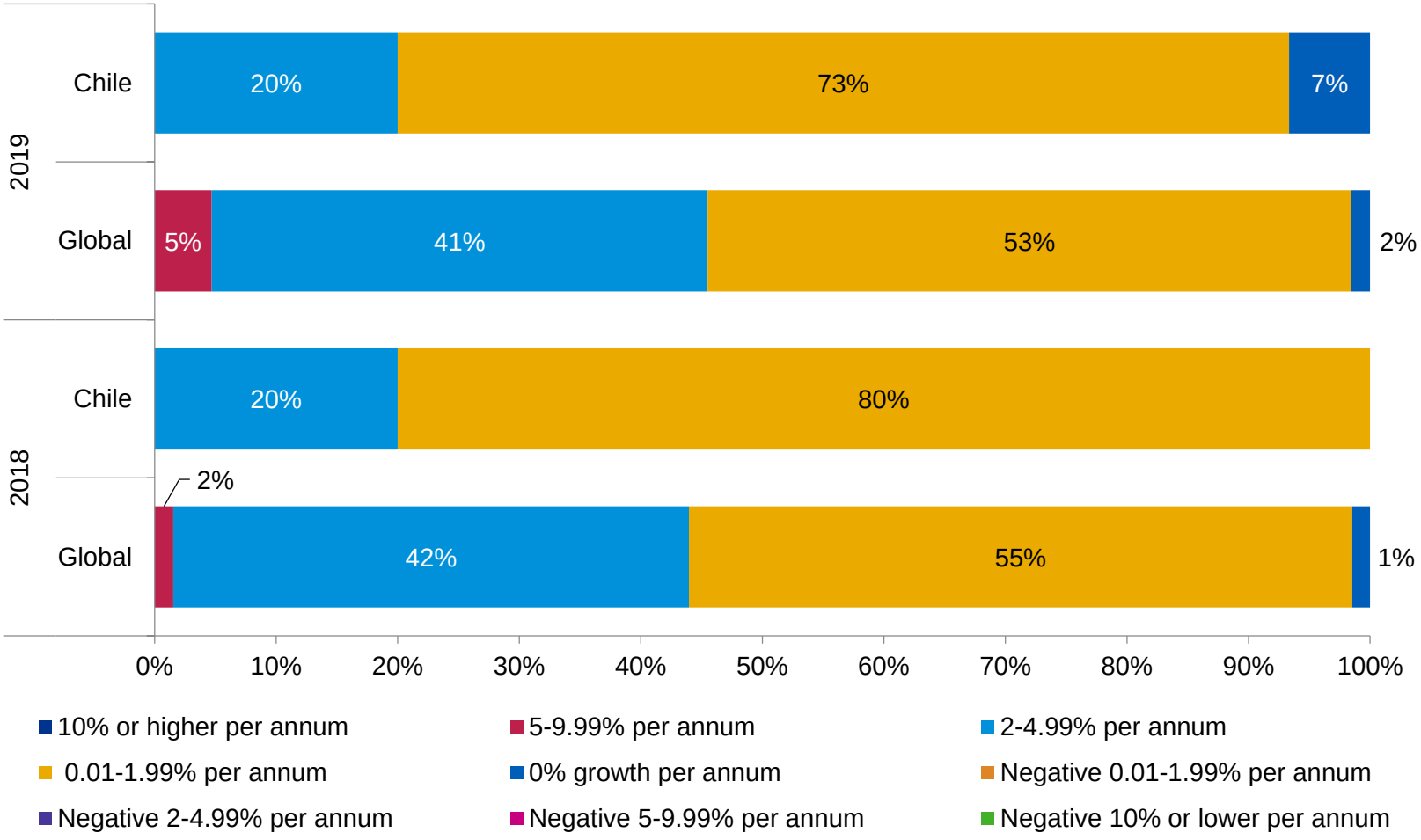
Perspectiva económica y confianza empresarial.

Q2. ¿Cuál es la perspectiva de su organización para el crecimiento de los ingresos de primera línea en los próximos 3 años?



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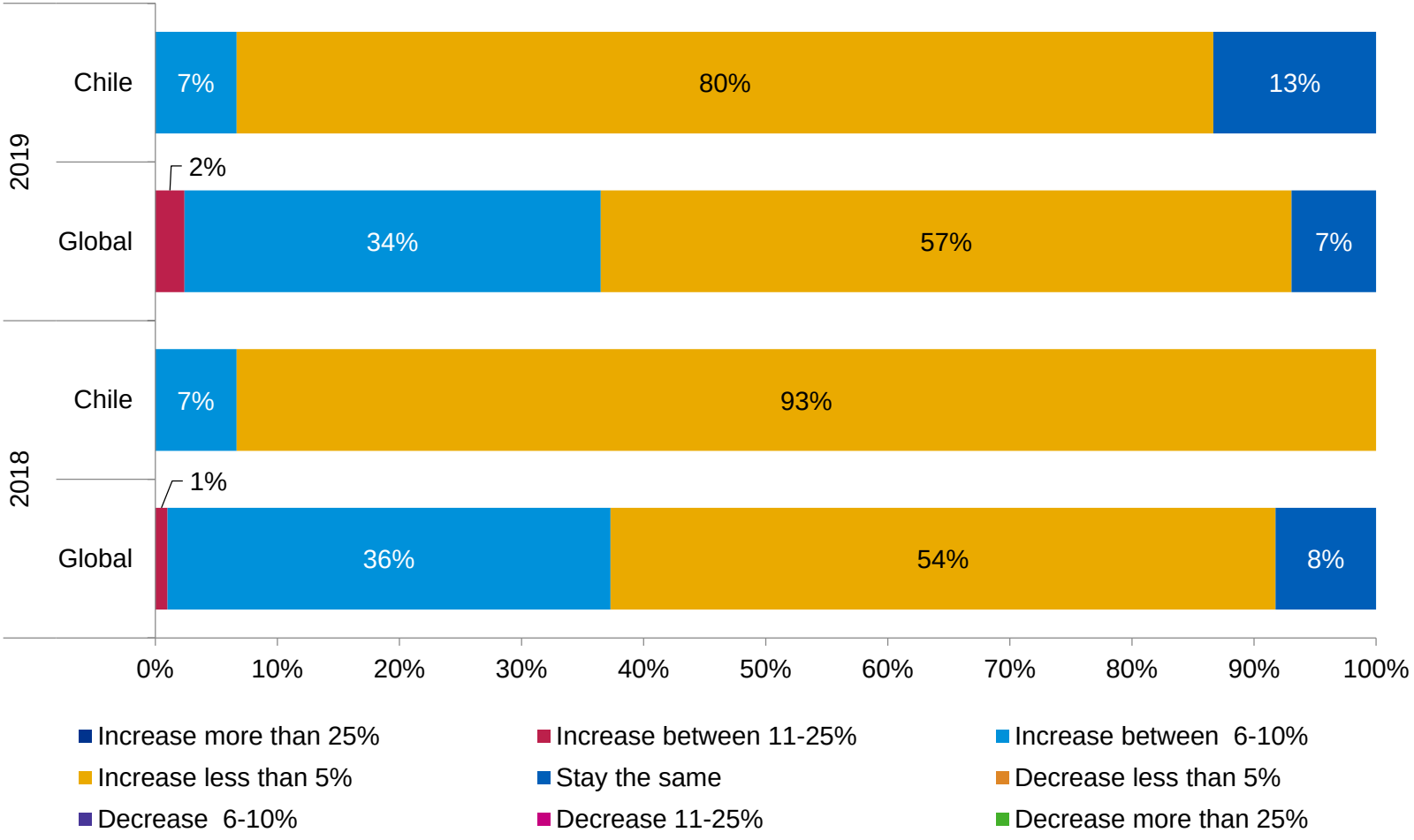
Perspectiva económica y confianza empresarial.

Q3. ¿Cómo espera que el número de empleados de su organización cambie en los próximos 3 años?



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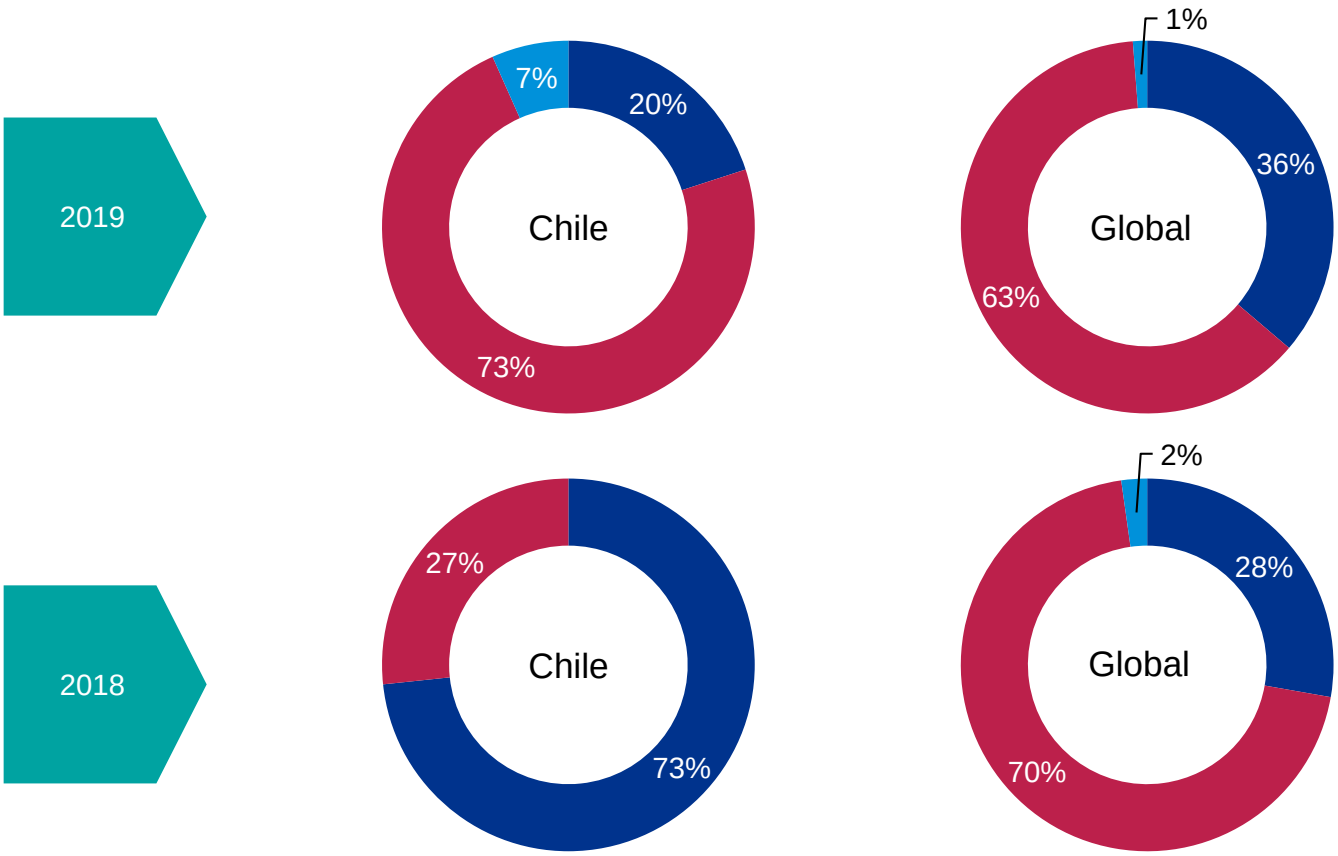
Perspectiva económica y confianza empresarial.

Q4A. ¿Cuál de los siguientes, en su caso, será la mayor prioridad de su organización para la expansión geográfica en los próximos 3 años?



- Developed markets (i.e. mature economy and capital markets, open to foreign ownership)
- Emerging markets (i.e. economy with less well-developed capital markets, regulation and infrastructure, but becoming more advanced)
- Not applicable — we do not plan to enter any new country markets

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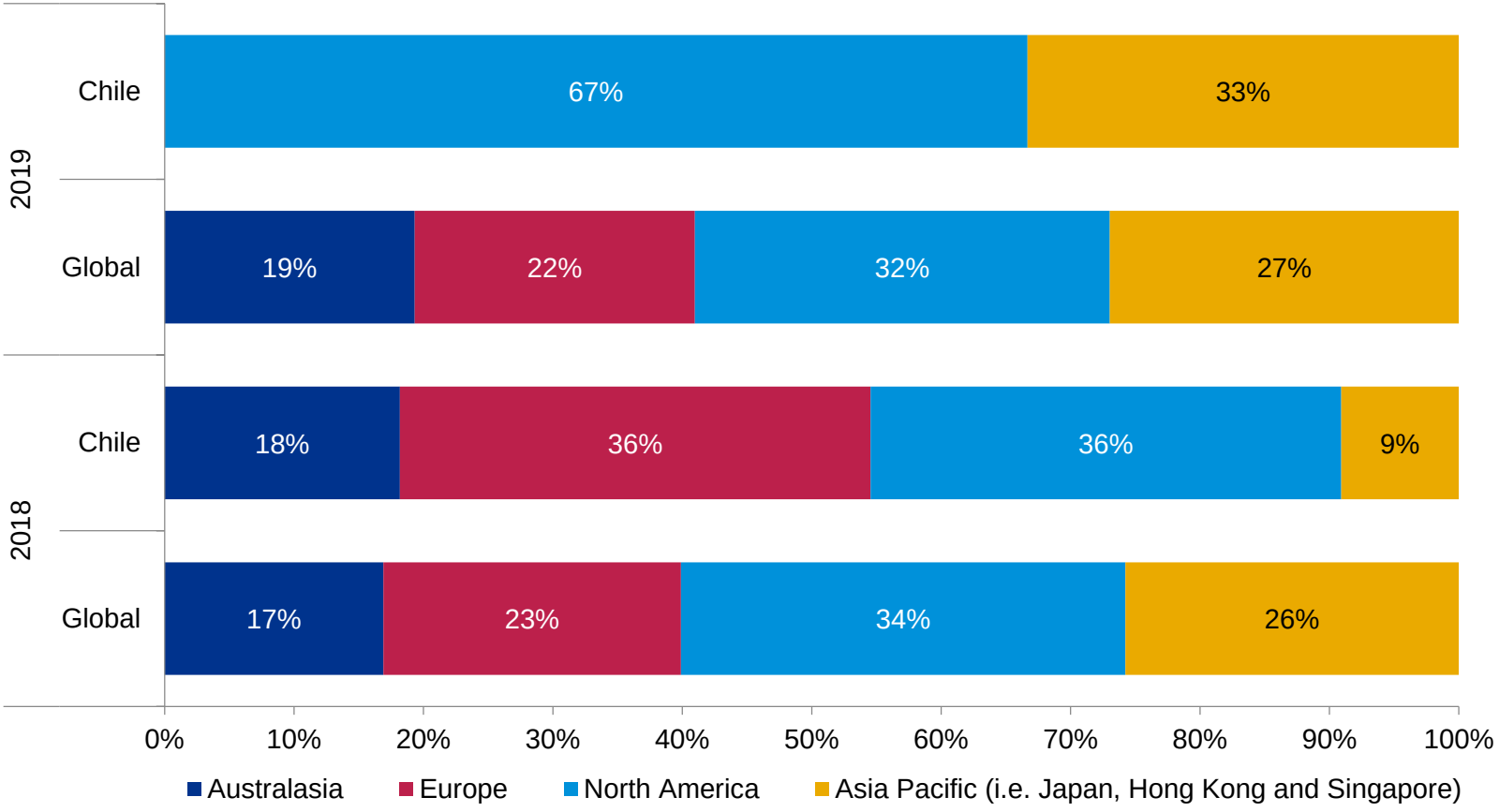
Q4B. ¿Qué mercados desarrollados están priorizando principalmente para la expansión en los próximos 3 años?

Se preguntó a los encuestados si su respuesta a la Q4A era un mercado desarrollado.



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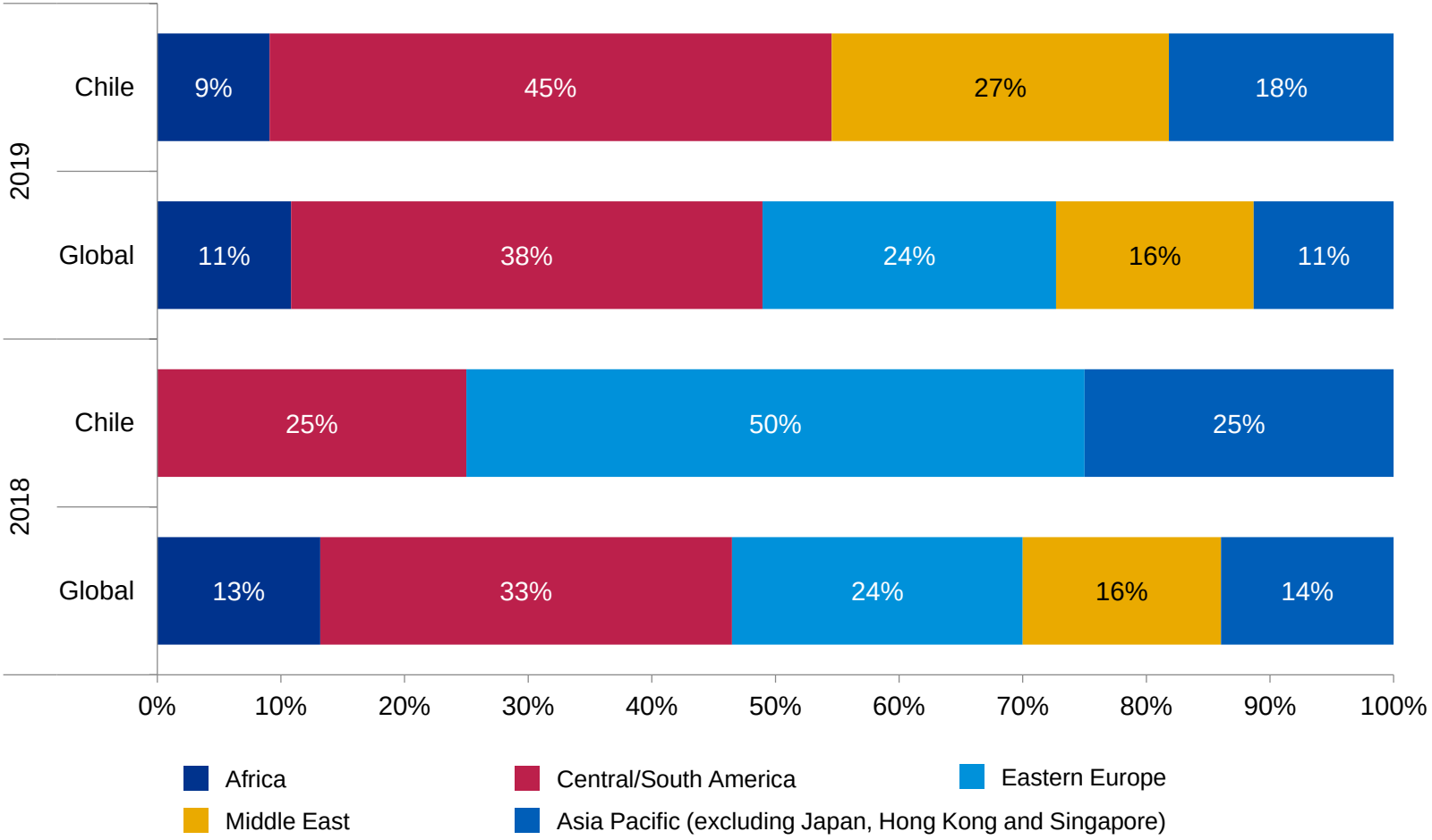
Q4C. ¿Qué mercados desarrollados están priorizando principalmente para la expansión en los próximos 3 años?

Se preguntó a los encuestados si su respuesta a Q4A era de mercados emergentes.



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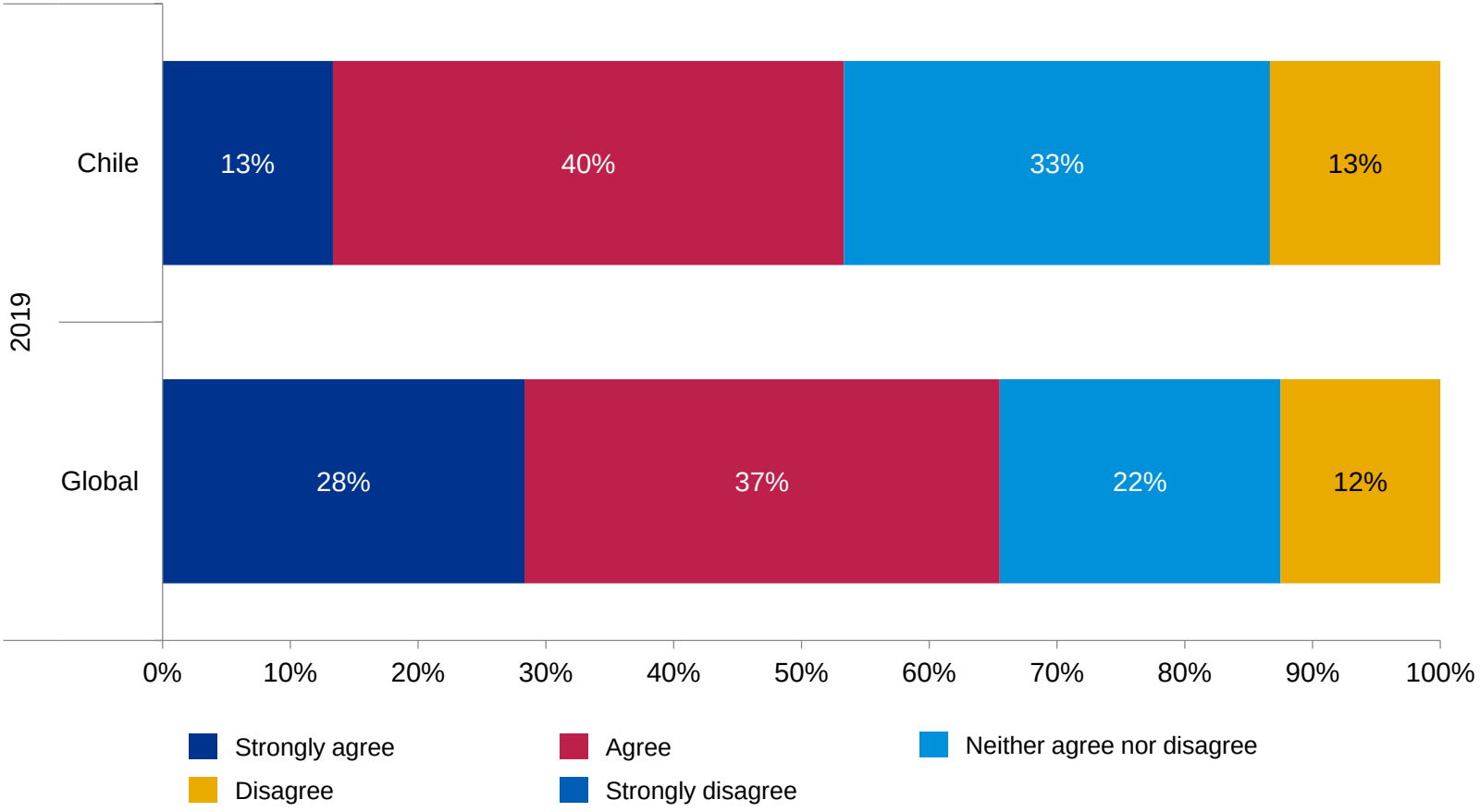
Q5. ¿En qué medida está de acuerdo o en desacuerdo con las siguientes afirmaciones sobre la expansión de su negocio en nuevos mercados?

A. Al expandirnos a mercados emergentes, estamos dando prioridad a los países y regiones que forman parte de la Iniciativa China Belt and Road.



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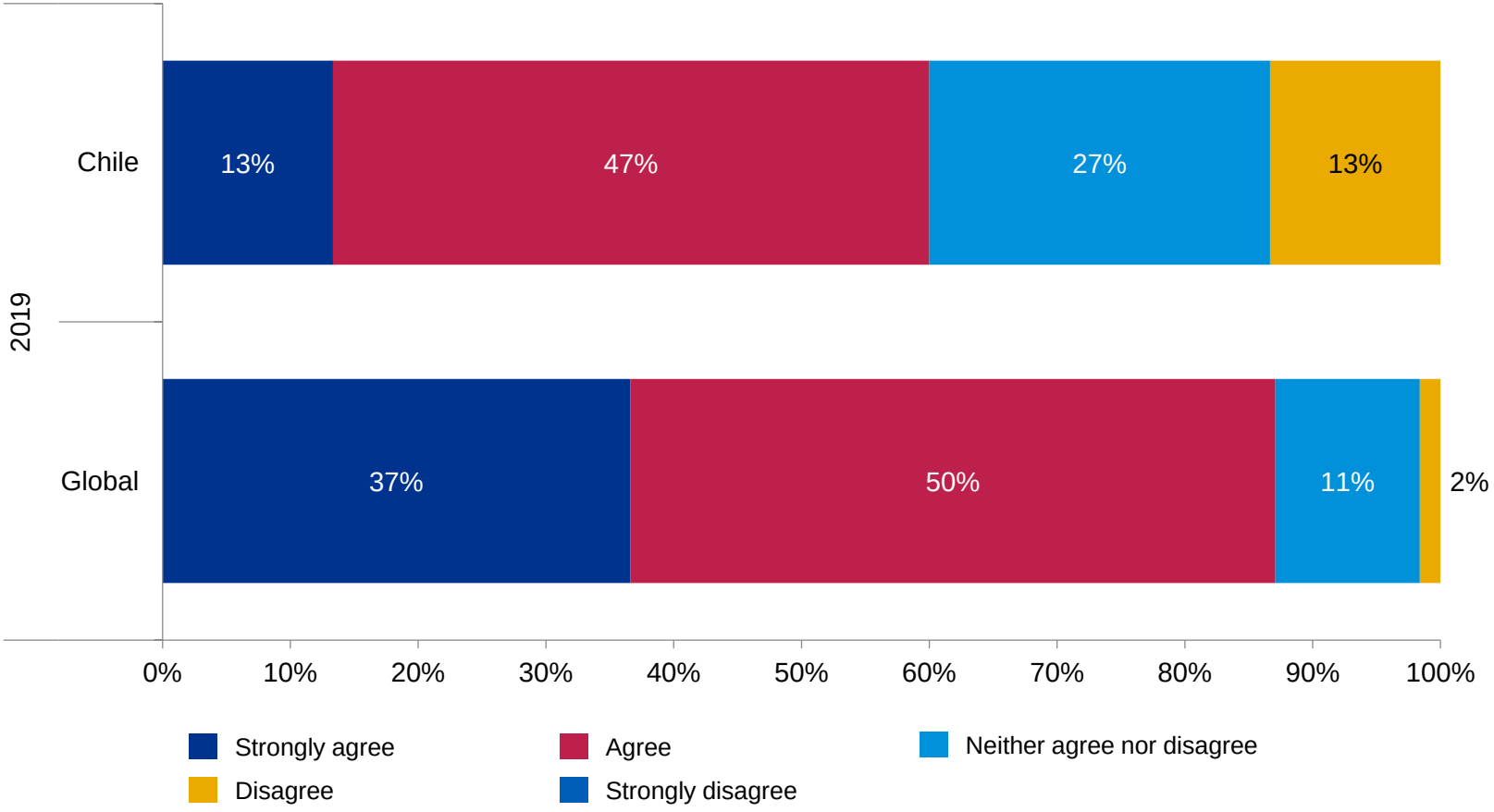
Q5. ¿En qué medida está de acuerdo o en desacuerdo con las siguientes afirmaciones sobre la expansión de su negocio en nuevos mercados?

B. Estamos construyendo nuestra presencia en los mercados emergentes para ser más resistentes como negocio.



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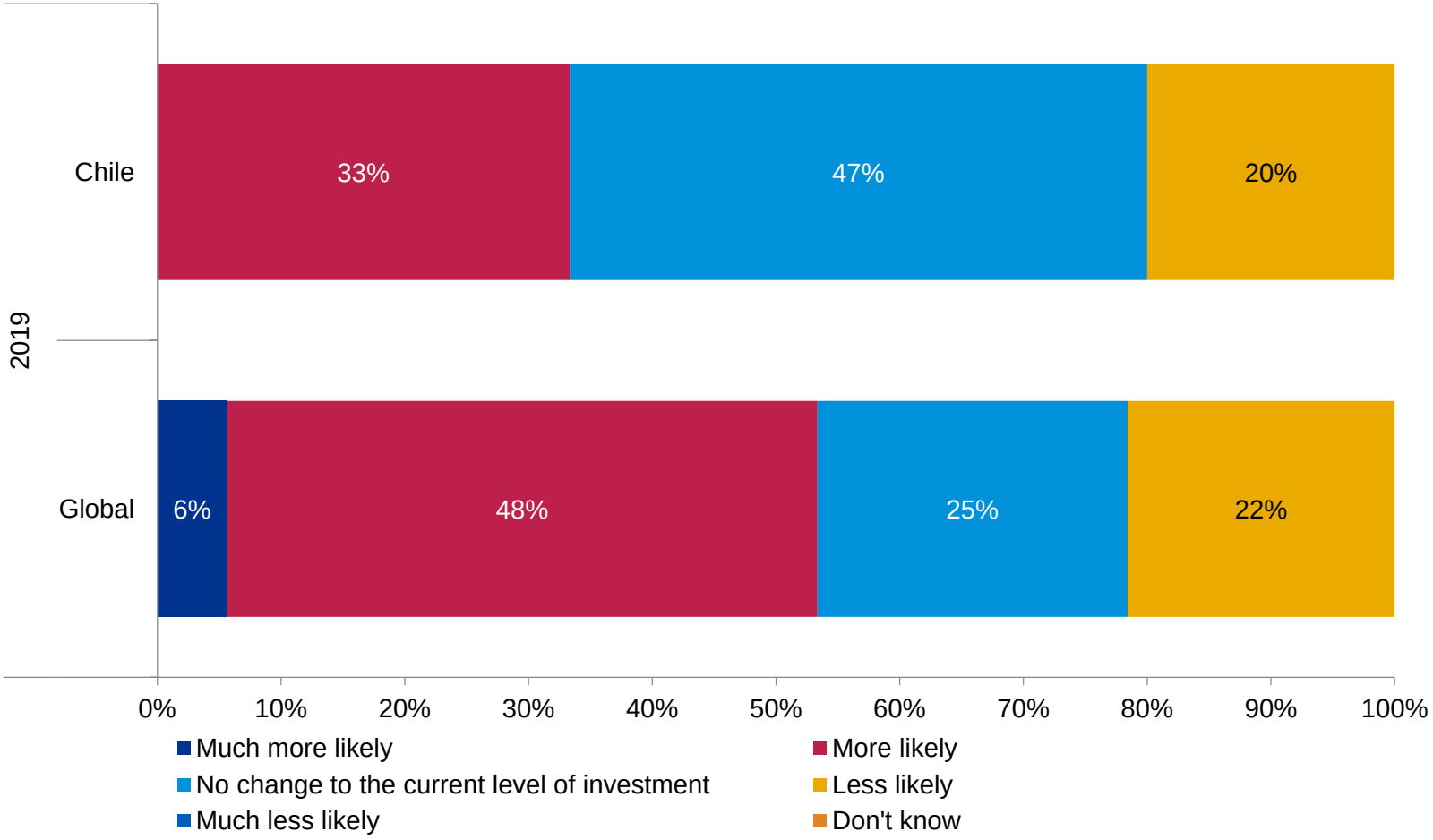
Q6. ¿Qué tan probable será que inviertas en el post Brexit del Reino Unido?



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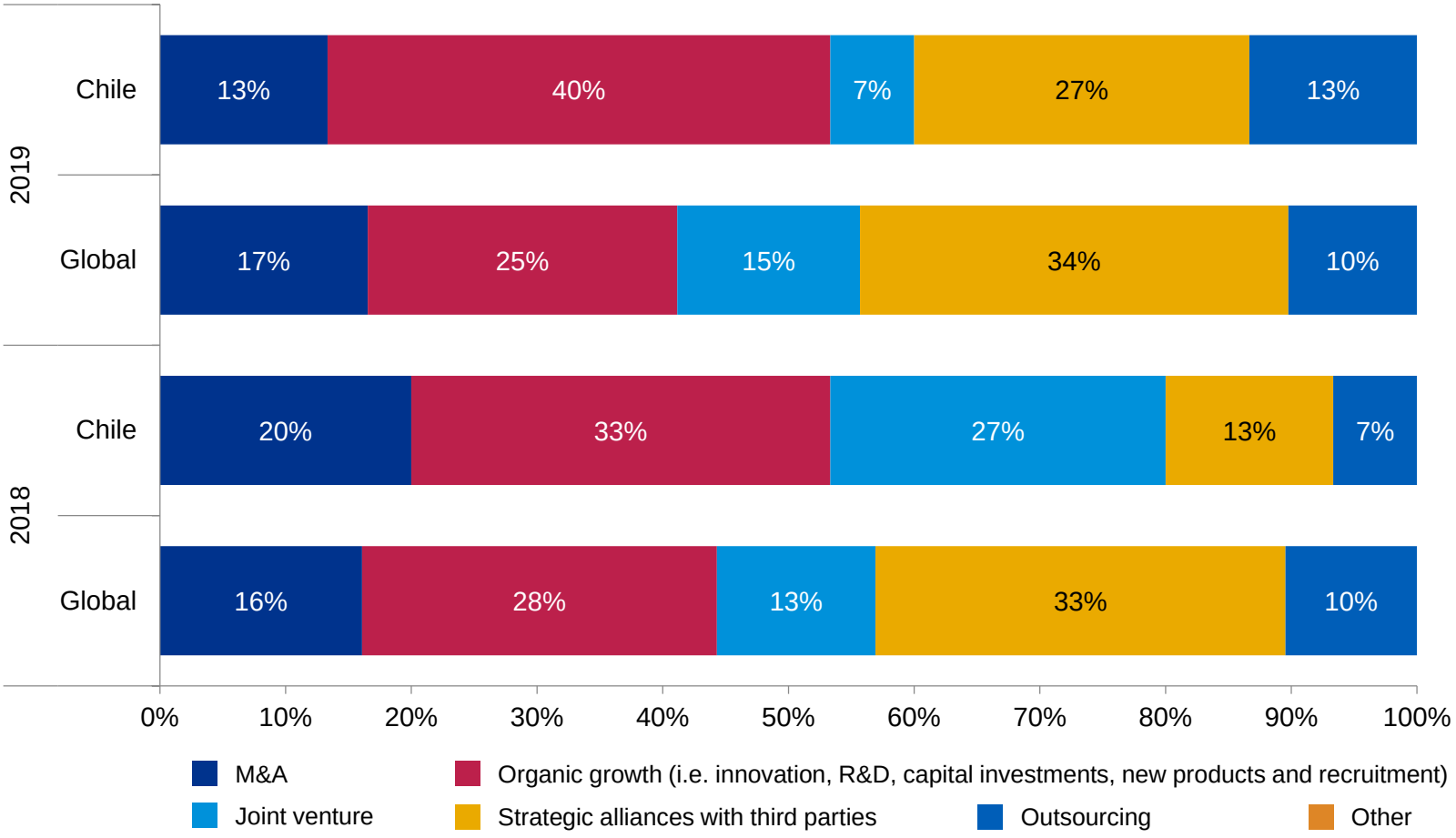
Política y entorno empresarial

Política y entorno empresarial.

Q7. ¿Cuál de las siguientes estrategias será la más importante para lograr los objetivos de crecimiento de su organización en los próximos 3 años?



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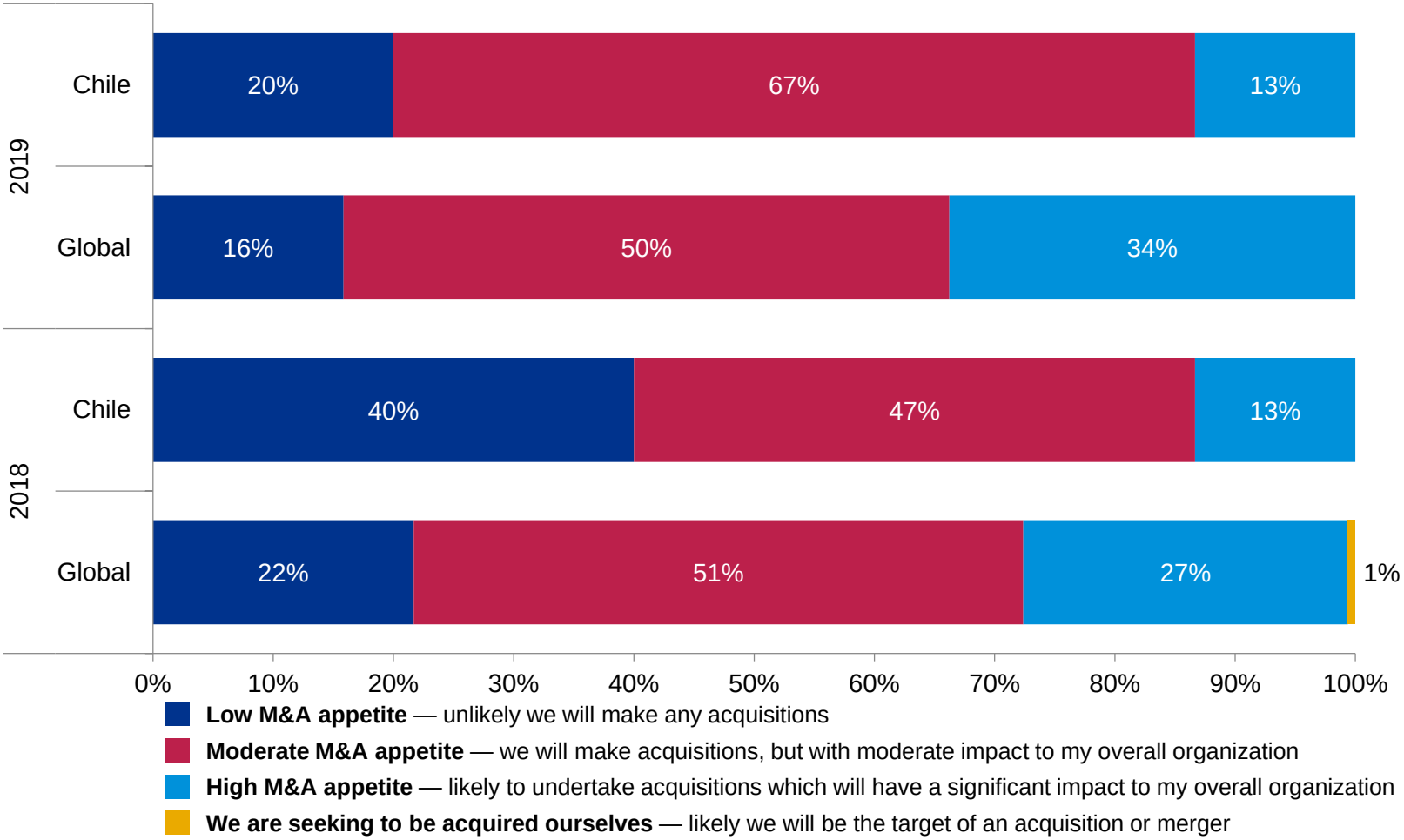
Política y entorno empresarial.

Q8A. En los próximos 3 años, ¿cómo describiría el interés de M&A de su organización?



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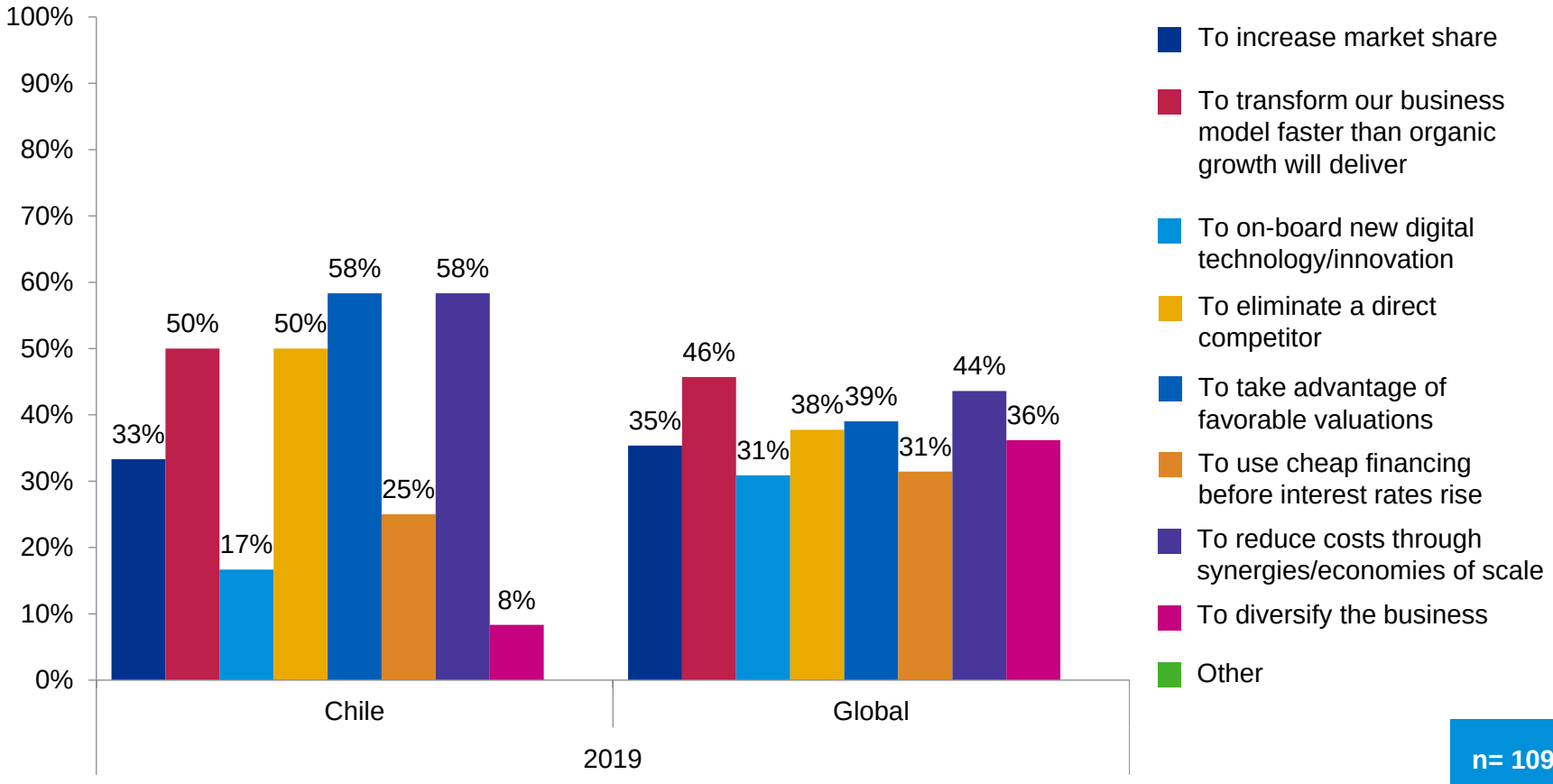
Política y entorno empresarial.

Q8B. ¿Cuáles son los principales impulsores del apetito de M&A de su organización en los próximos 3 años?



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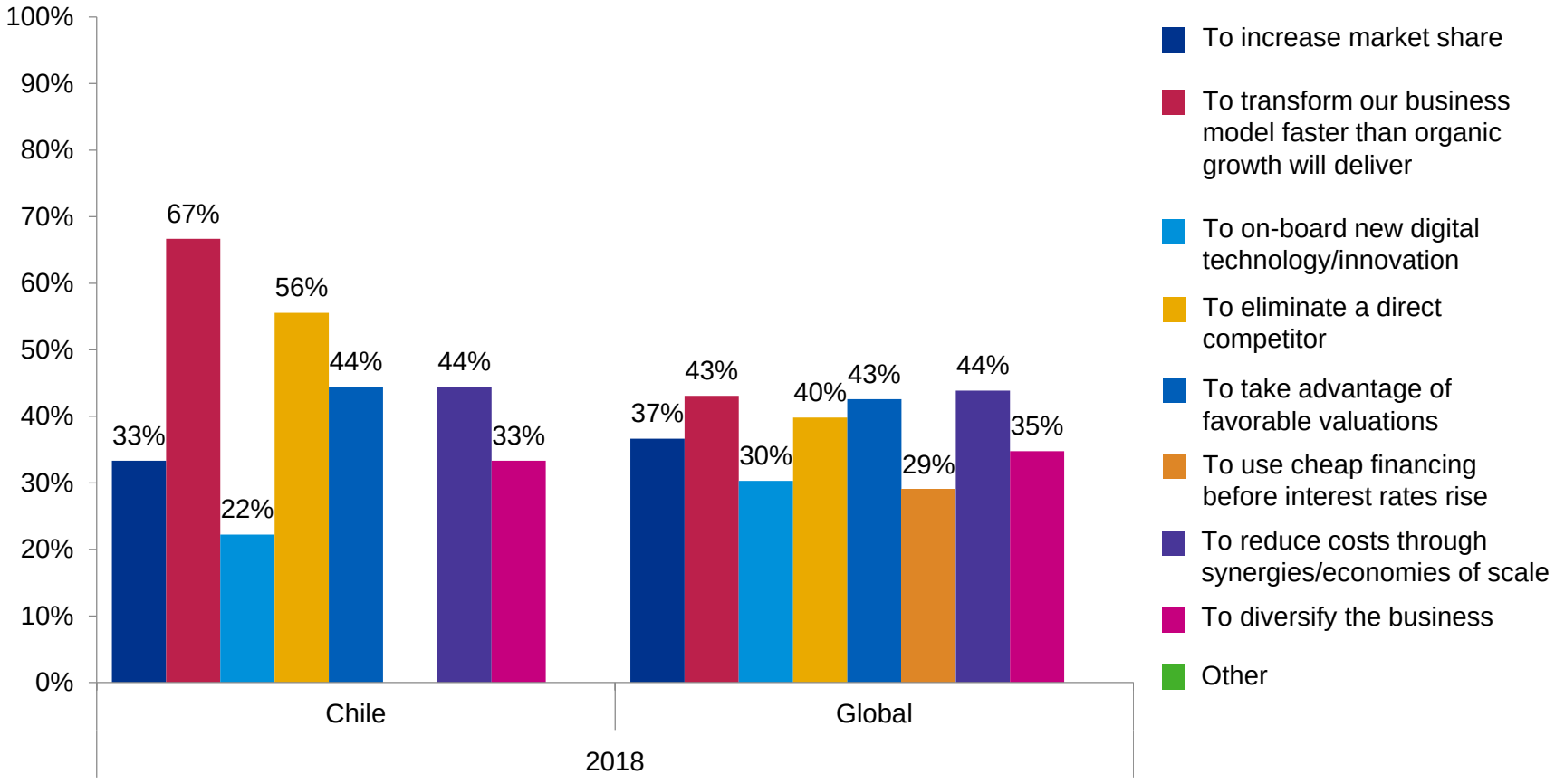
Política y entorno empresarial.

Q8B. ¿Cuáles son los principales impulsores del apetito de M&A de su organización en los próximos 3 años?



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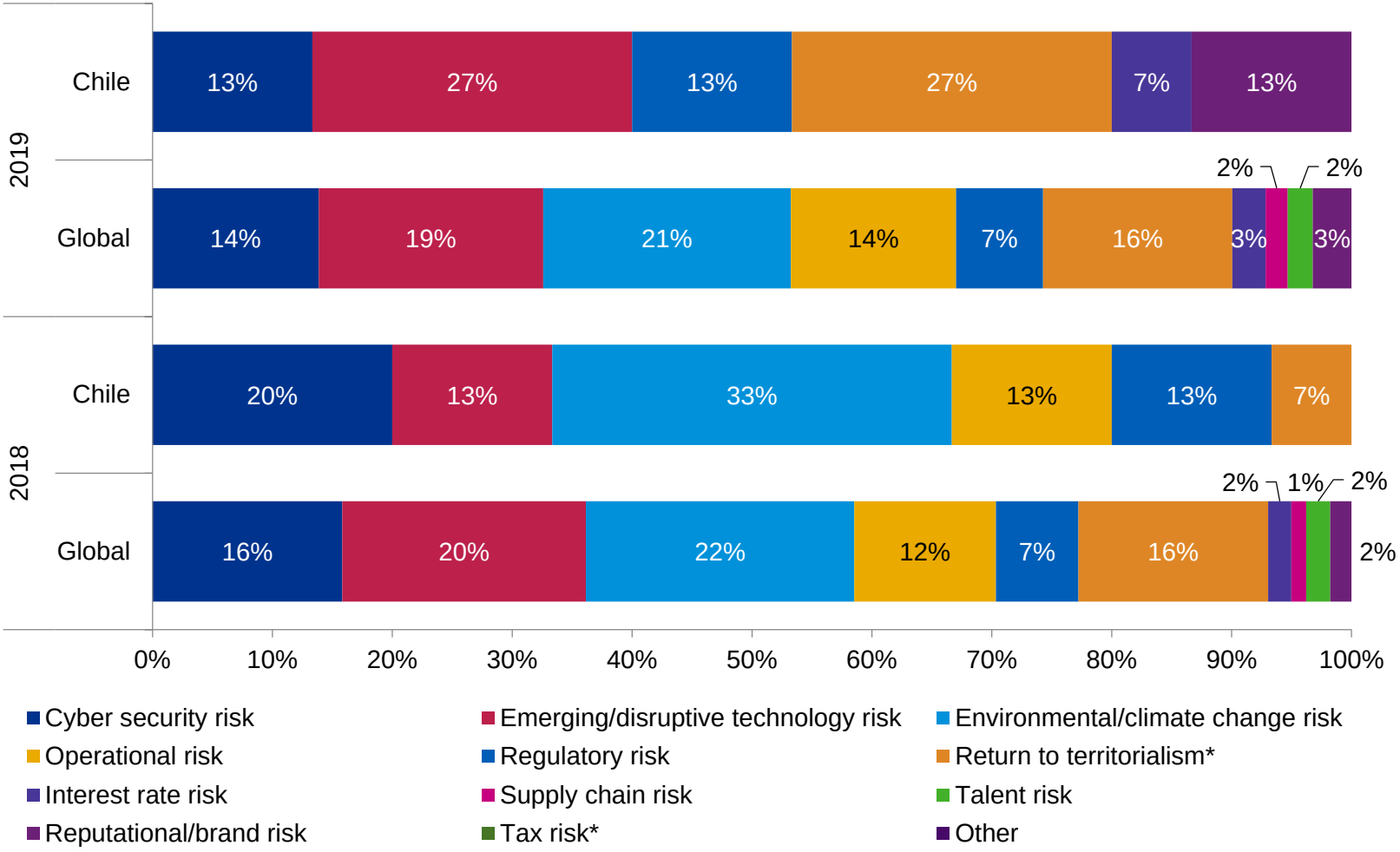
Política y entorno empresarial.

Q9A. ¿Cuál de los siguientes riesgos representa la mayor amenaza para el crecimiento de su organización?
Regreso al territorialismo, Riesgo fiscal.



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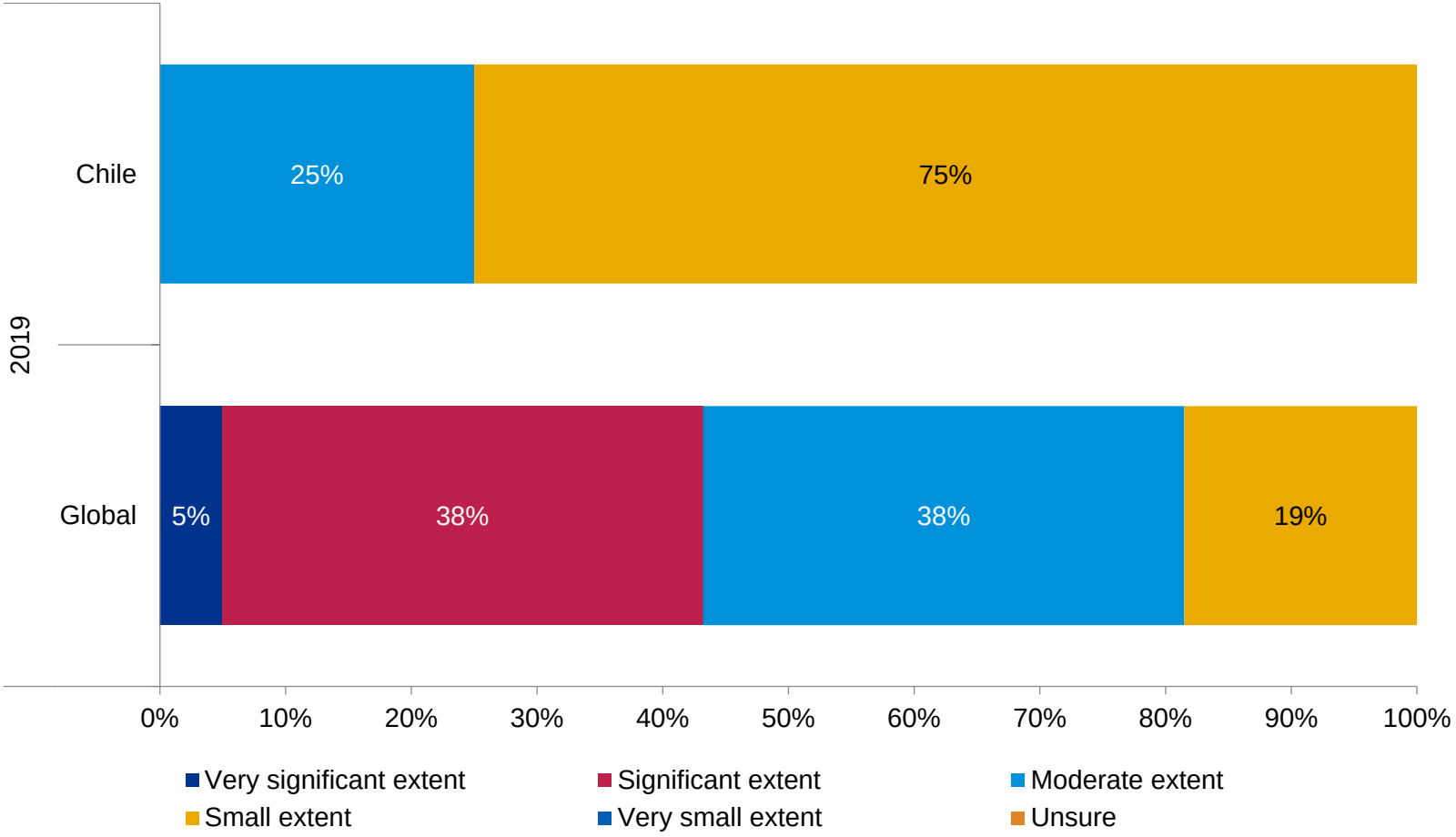
Política y entorno empresarial.

Q9B. Usted mencionó que el riesgo de tecnología emergente / disruptiva es actualmente la mayor amenaza para el crecimiento de su organización. ¿Hasta qué punto es el riesgo de seguridad cibernética una causa de este factor de riesgo?



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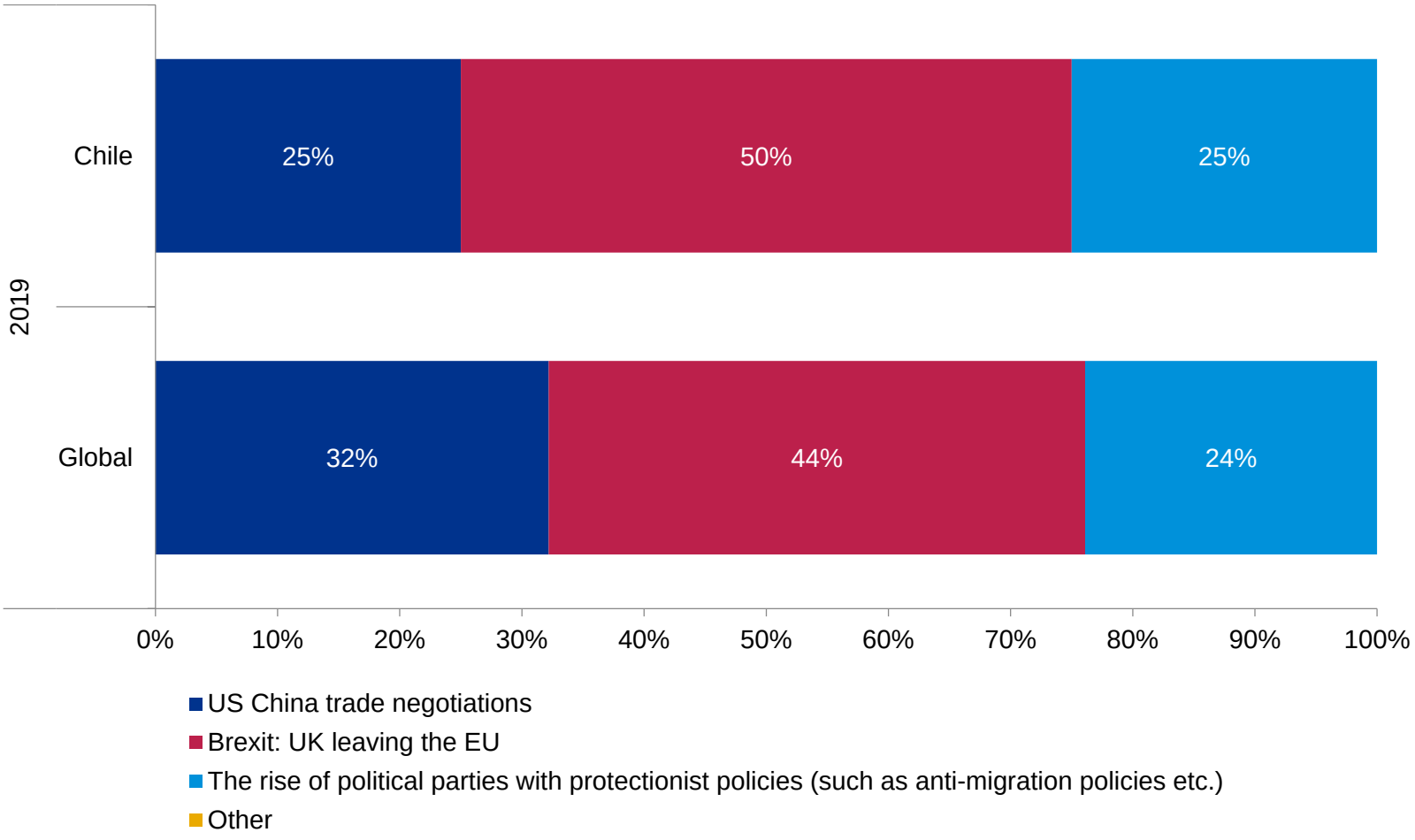
Política y entorno empresarial.

Q9C. Usted mencionó que un retorno al territorialismo representa la mayor amenaza para el crecimiento. ¿Cuál de los siguientes le preocupa más?



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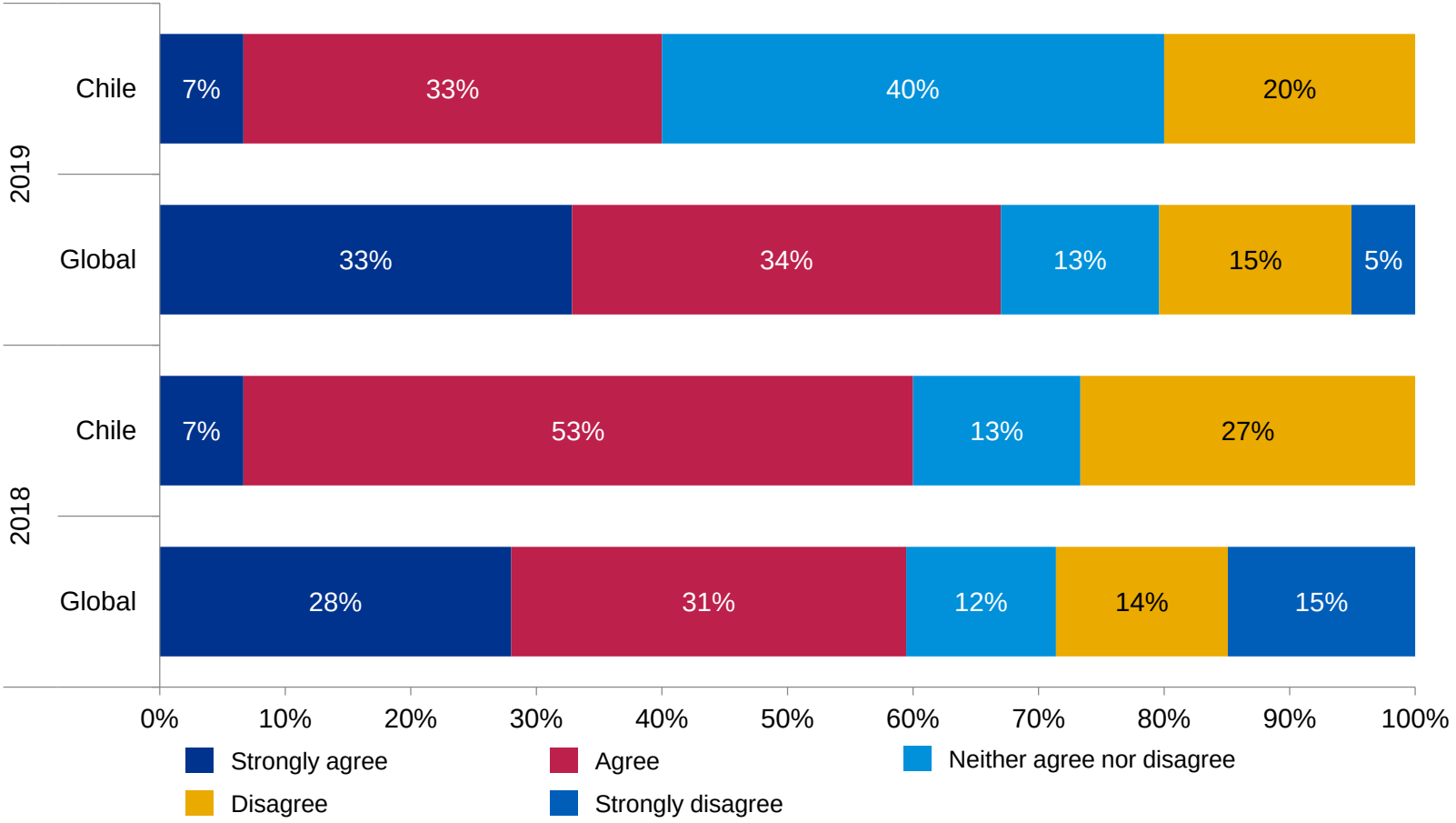
Política y entorno empresarial.

Q10A. ¿En qué medida está de acuerdo o en desacuerdo con las siguientes afirmaciones sobre el crecimiento de su organización?

A. Actuar con agilidad es la nueva moneda de negocio; Si somos demasiado lentos, estaremos en bancarrota.



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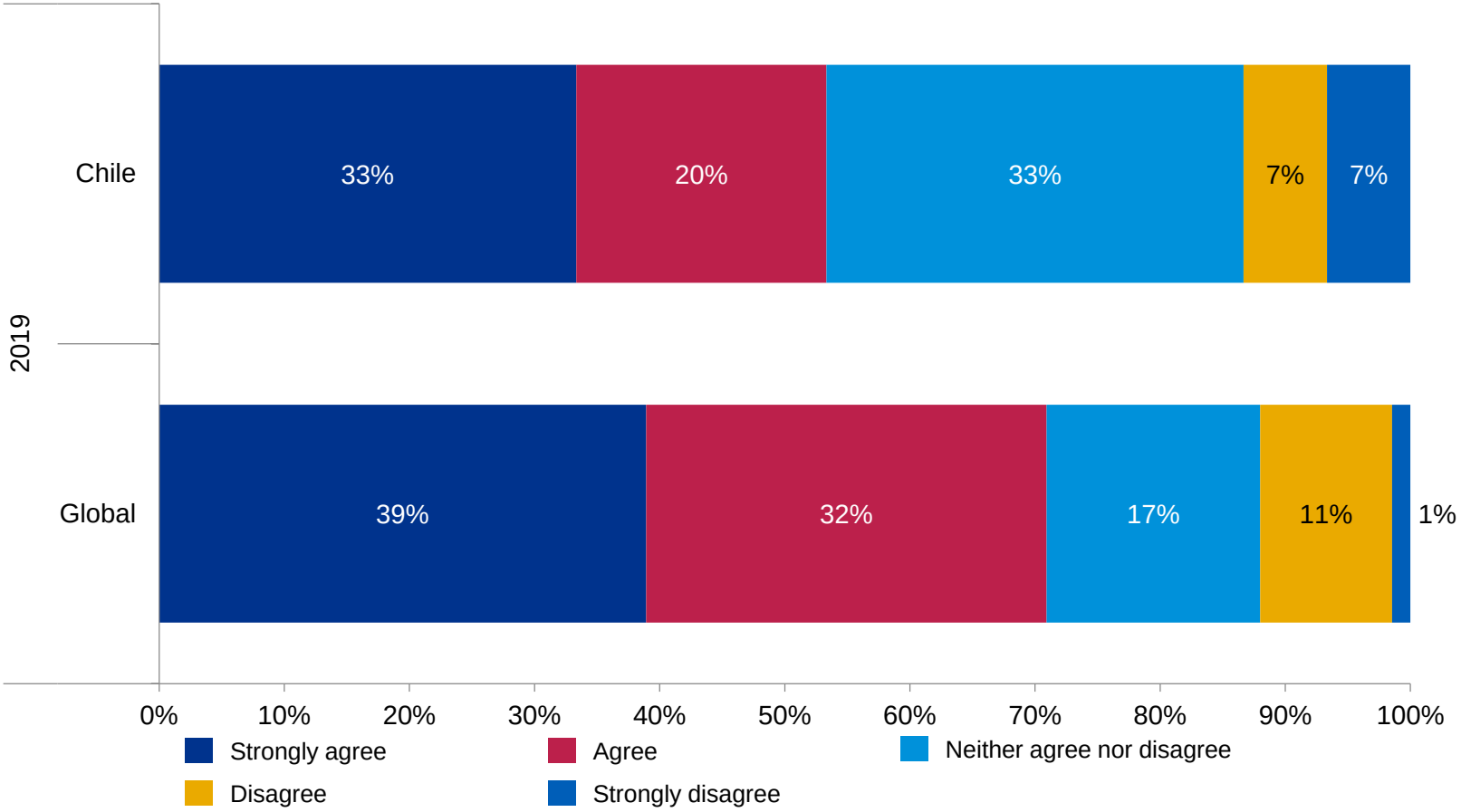
Política y entorno empresarial.

Q10A. ¿En qué medida está de acuerdo o en desacuerdo con las siguientes afirmaciones sobre el crecimiento de su organización?

B. Nuestro crecimiento se basa en nuestra capacidad para desafiar e interrumpir cualquier norma empresarial



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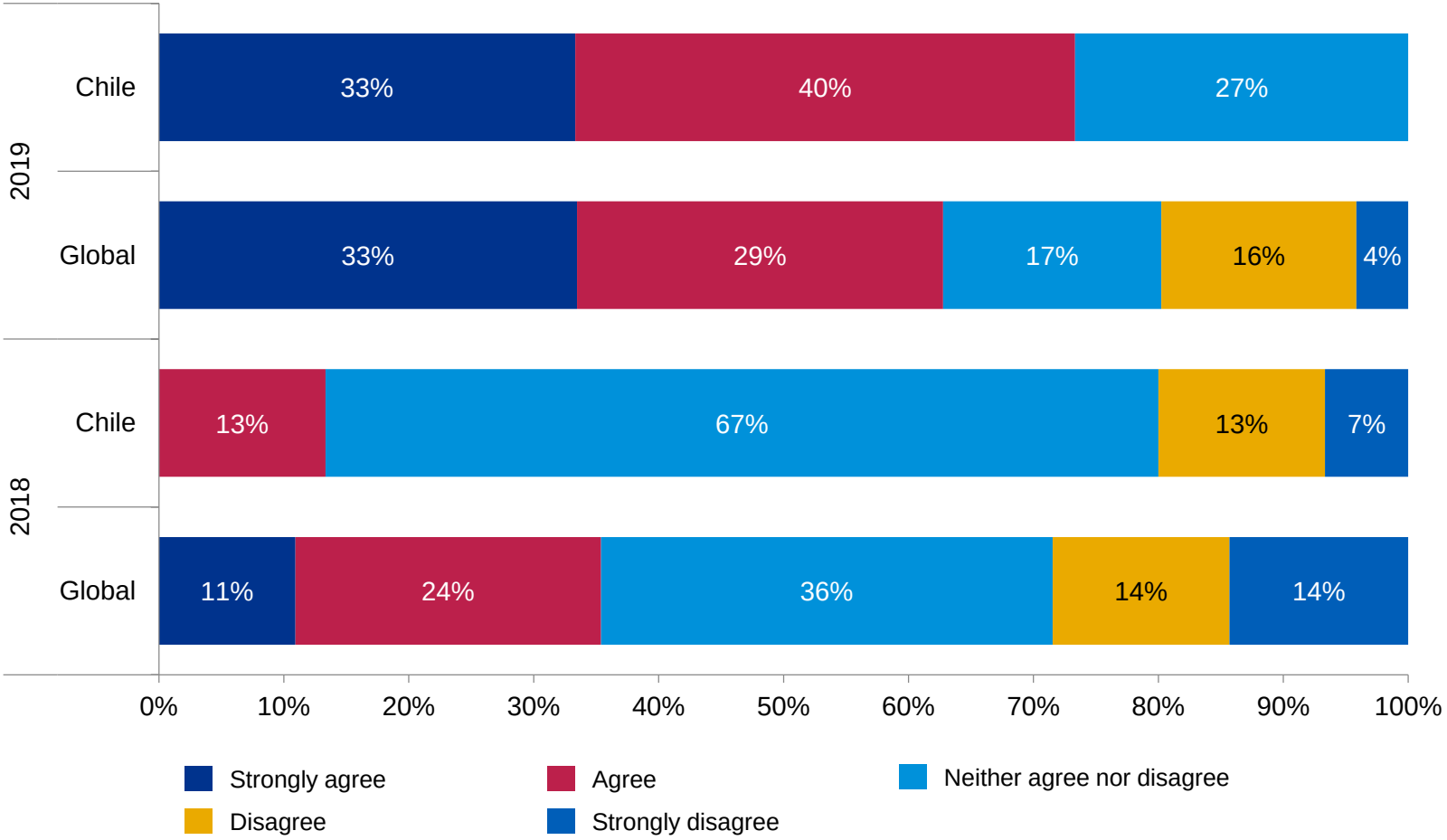
Política y entorno empresarial.

Q10A. ¿En qué medida está de acuerdo o en desacuerdo con las siguientes afirmaciones sobre el crecimiento de su organización?

C. Durante los próximos 3 años, debemos mejorar nuestros procesos de innovación y ejecución.



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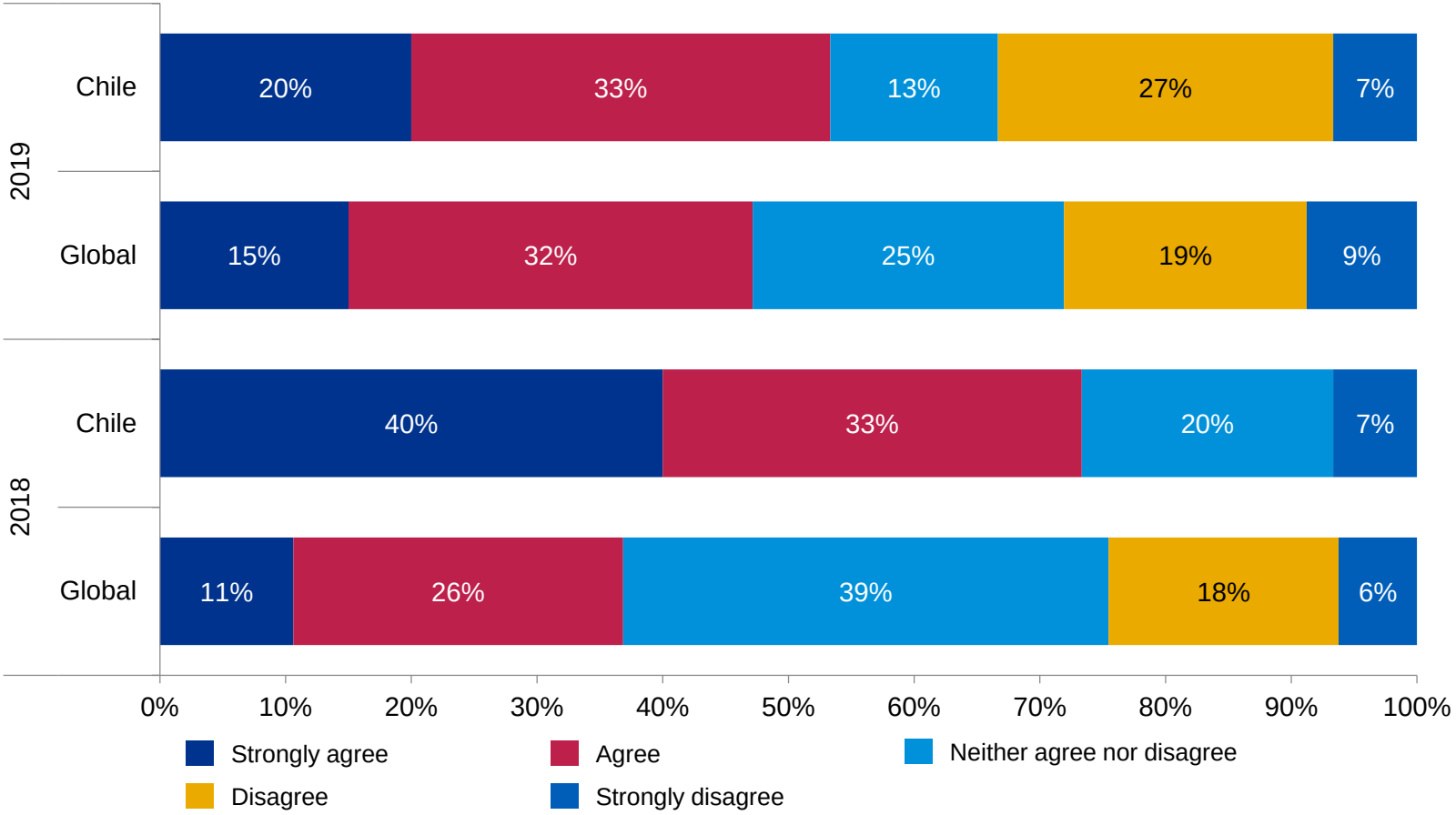
Política y entorno empresarial.

Q10A. ¿En qué medida está de acuerdo o en desacuerdo con las siguientes afirmaciones sobre el crecimiento de su organización?

D. Estamos luchando para vincular nuestra estrategia de crecimiento con un propósito social más amplio para la organización.



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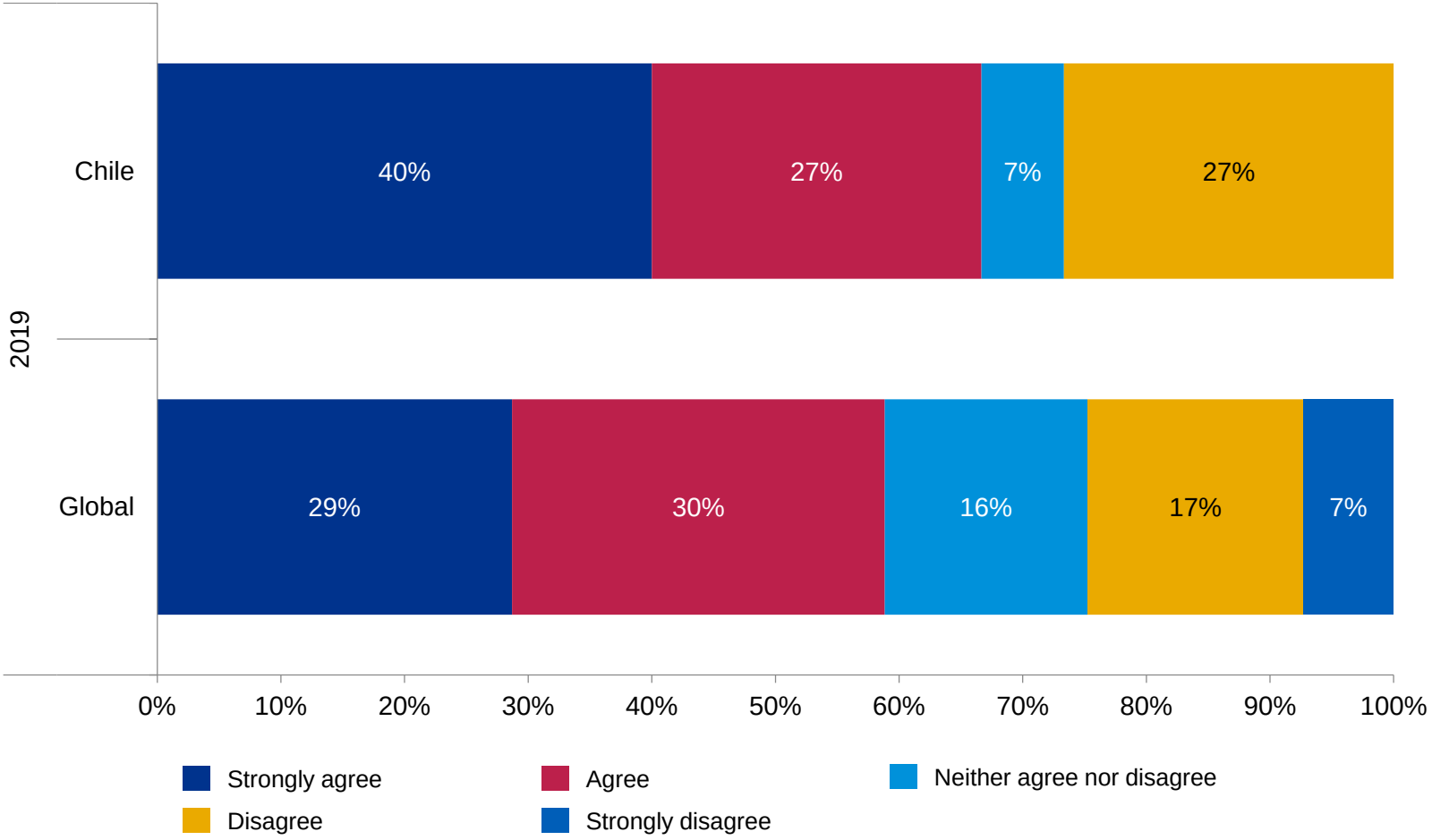
Política y entorno empresarial.

Q10A. ¿En qué medida está de acuerdo o en desacuerdo con las siguientes afirmaciones sobre el crecimiento de su organización?

E. Es un reto encontrar los trabajadores que necesitamos.



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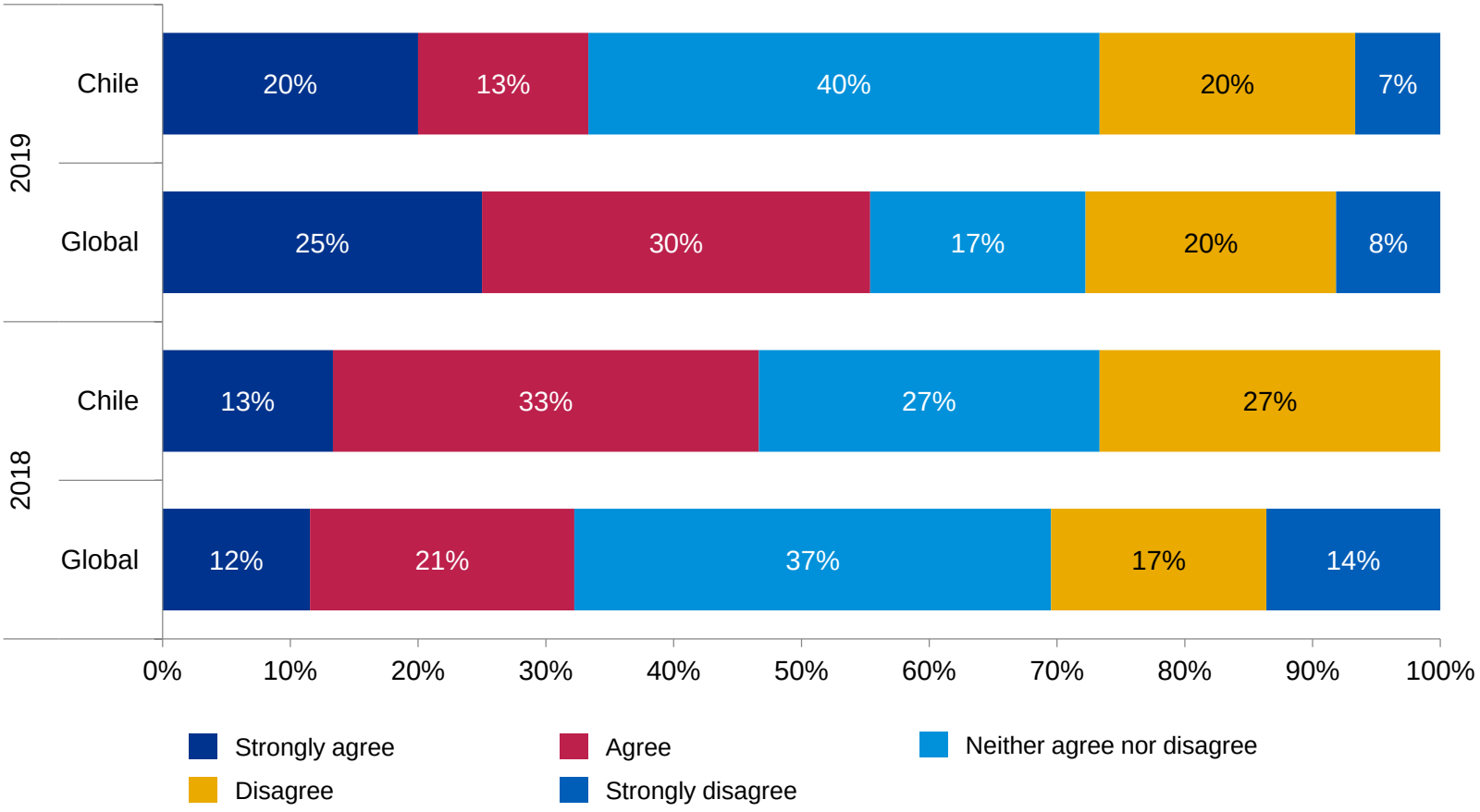
Política y entorno empresarial.

Q10B. ¿En qué medida está de acuerdo o en desacuerdo con las siguientes afirmaciones sobre el enfoque de su organización hacia los negocios sostenibles?

A. Debemos mirar más allá del crecimiento puramente financiero si queremos lograr un éxito sostenible a largo plazo



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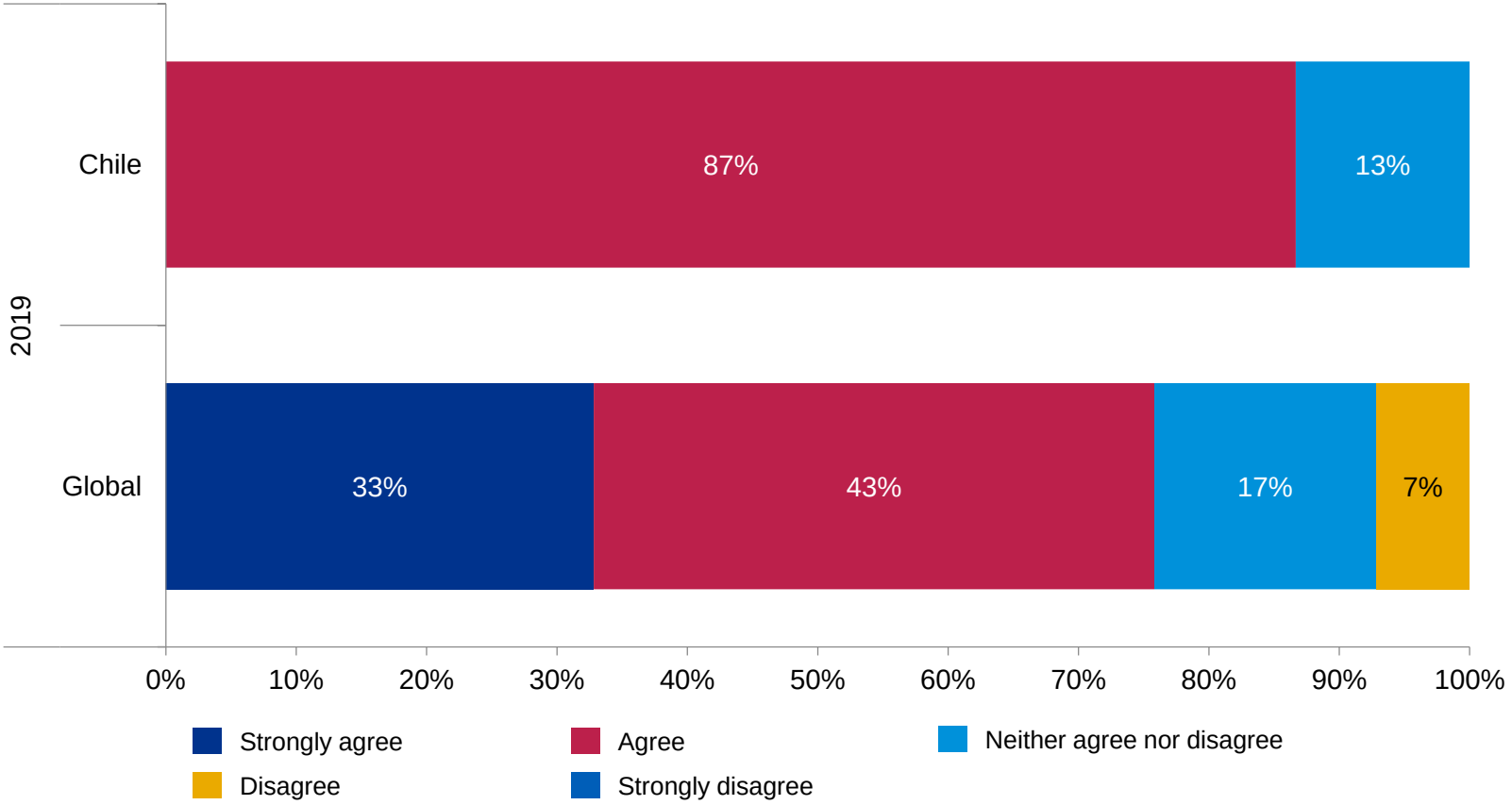
Política y entorno empresarial.

Q10B. ¿En qué medida está de acuerdo o en desacuerdo con las siguientes afirmaciones sobre el enfoque de su organización hacia los negocios sostenibles?

B. El crecimiento de mi organización estará determinado por nuestra capacidad para anticipar y navegar el cambio global hacia una economía de tecnología limpia y baja en emisiones de carbono



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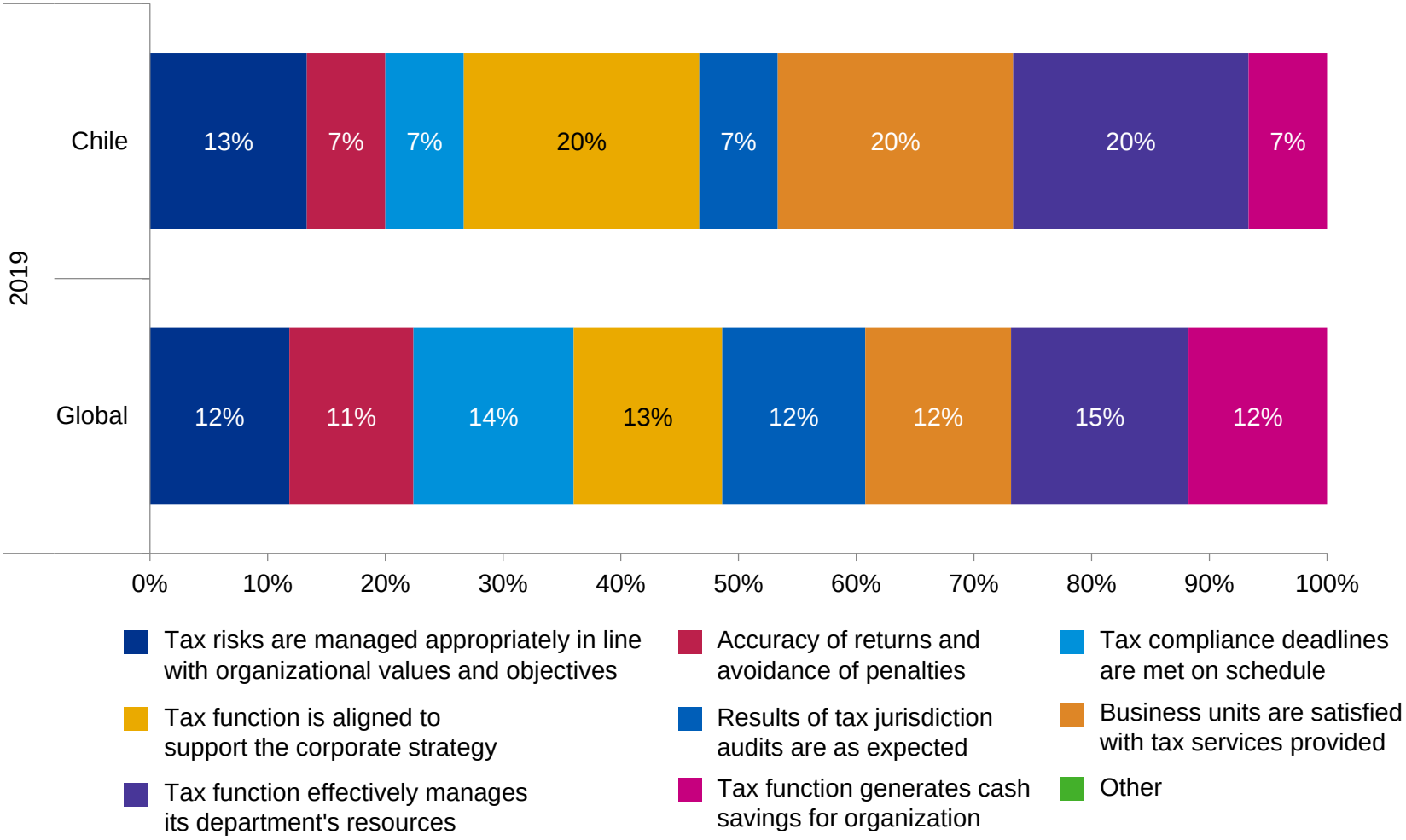
Política y entorno empresarial.

Q11. Si bien una serie de medidas será importante, ¿cuál de las siguientes considera la medida de rendimiento más importante para la función fiscal de su organización?



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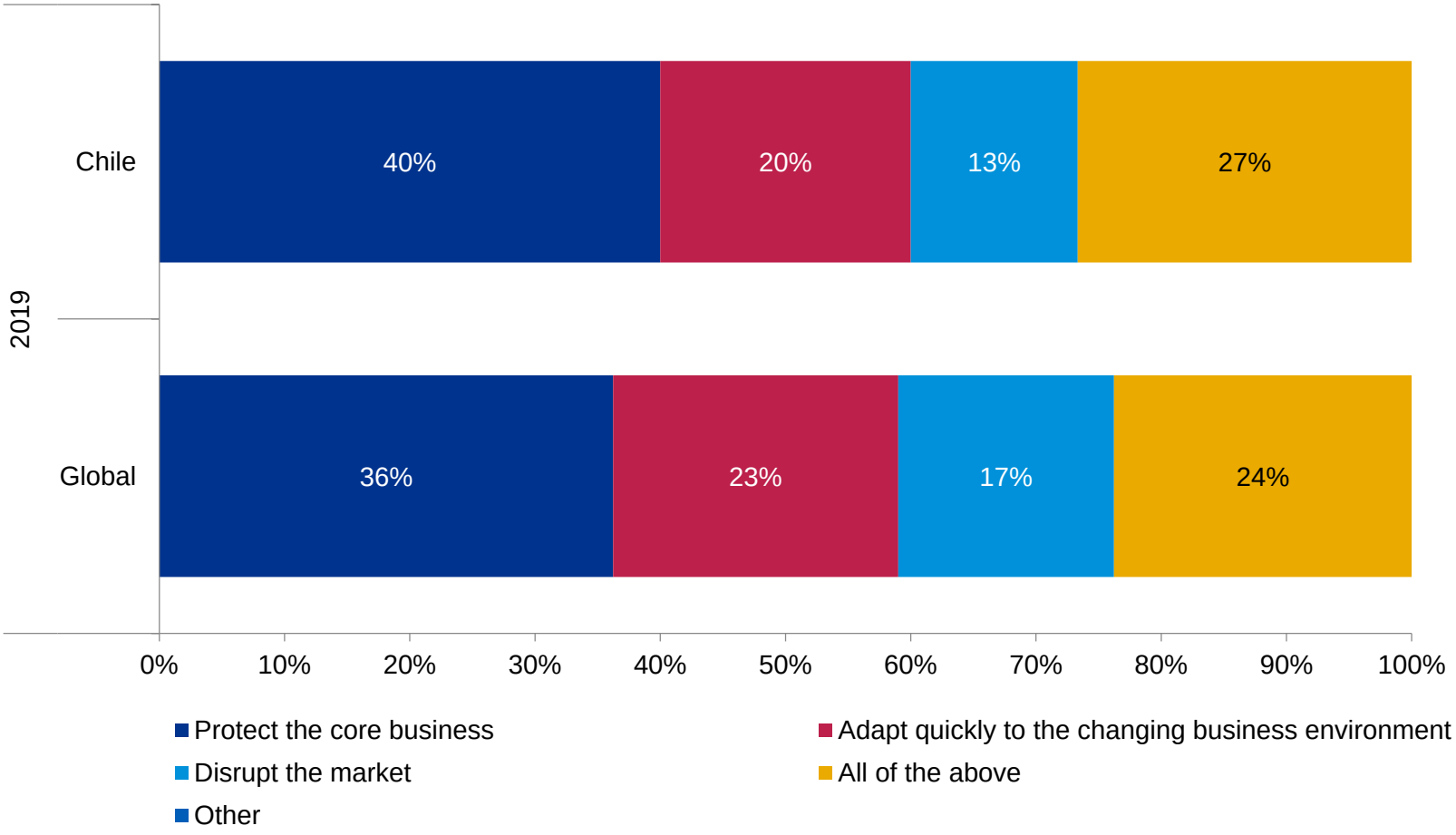
El líder resiliente

El líder resiliente

Q12. Por favor seleccione la opción que mejor complete la siguiente declaración:
Sobre todo, en un clima de negocios incierto, un negocio verdaderamente resistente es uno que puede ...



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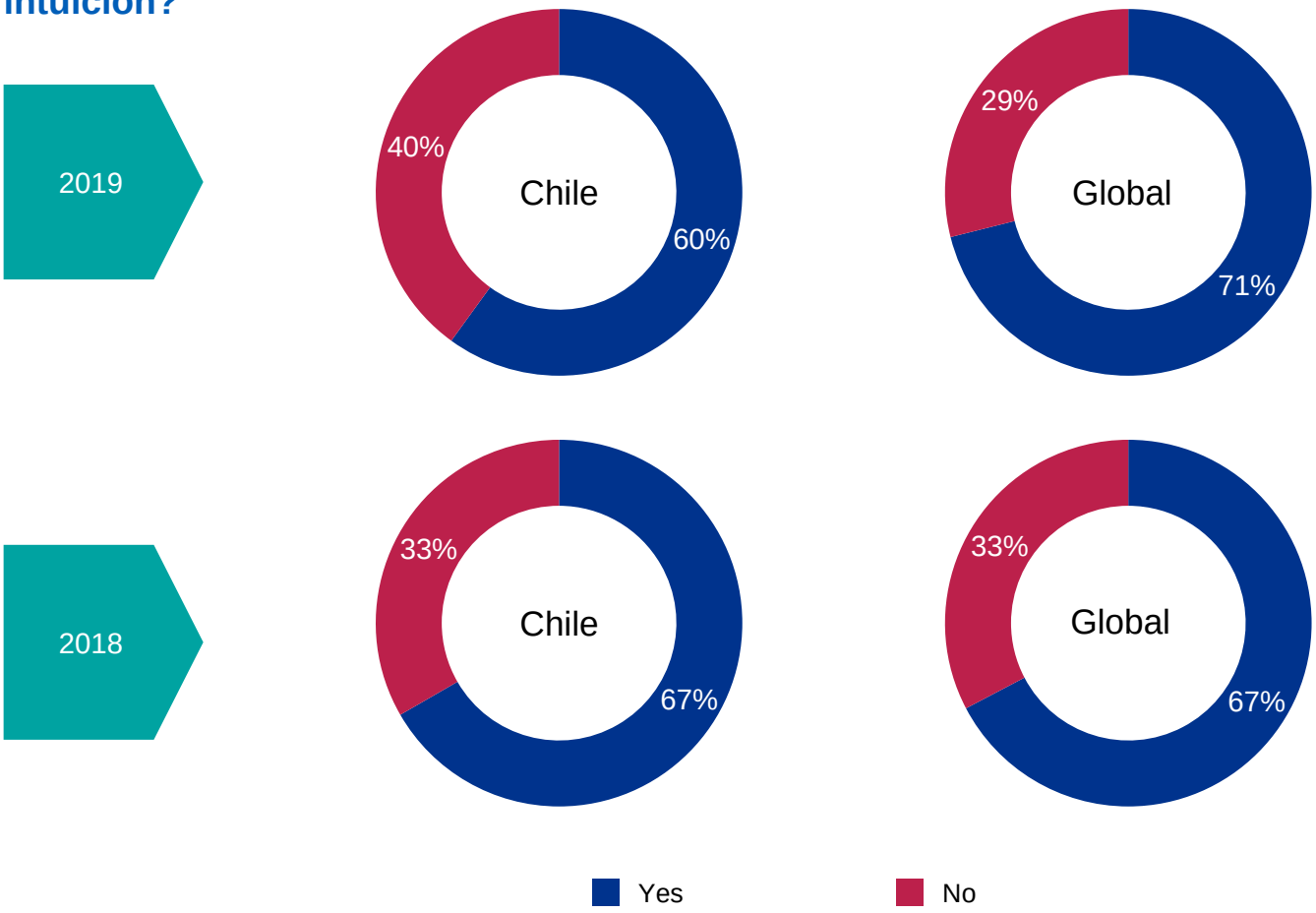
Q13. Pensando en las decisiones críticas que ha tomado en los últimos 3 años, ¿alguna vez ha pasado por alto las ideas proporcionadas por los modelos de análisis de datos / modelos controlados por computadora porque eran contrarios a su propia experiencia / intuición?



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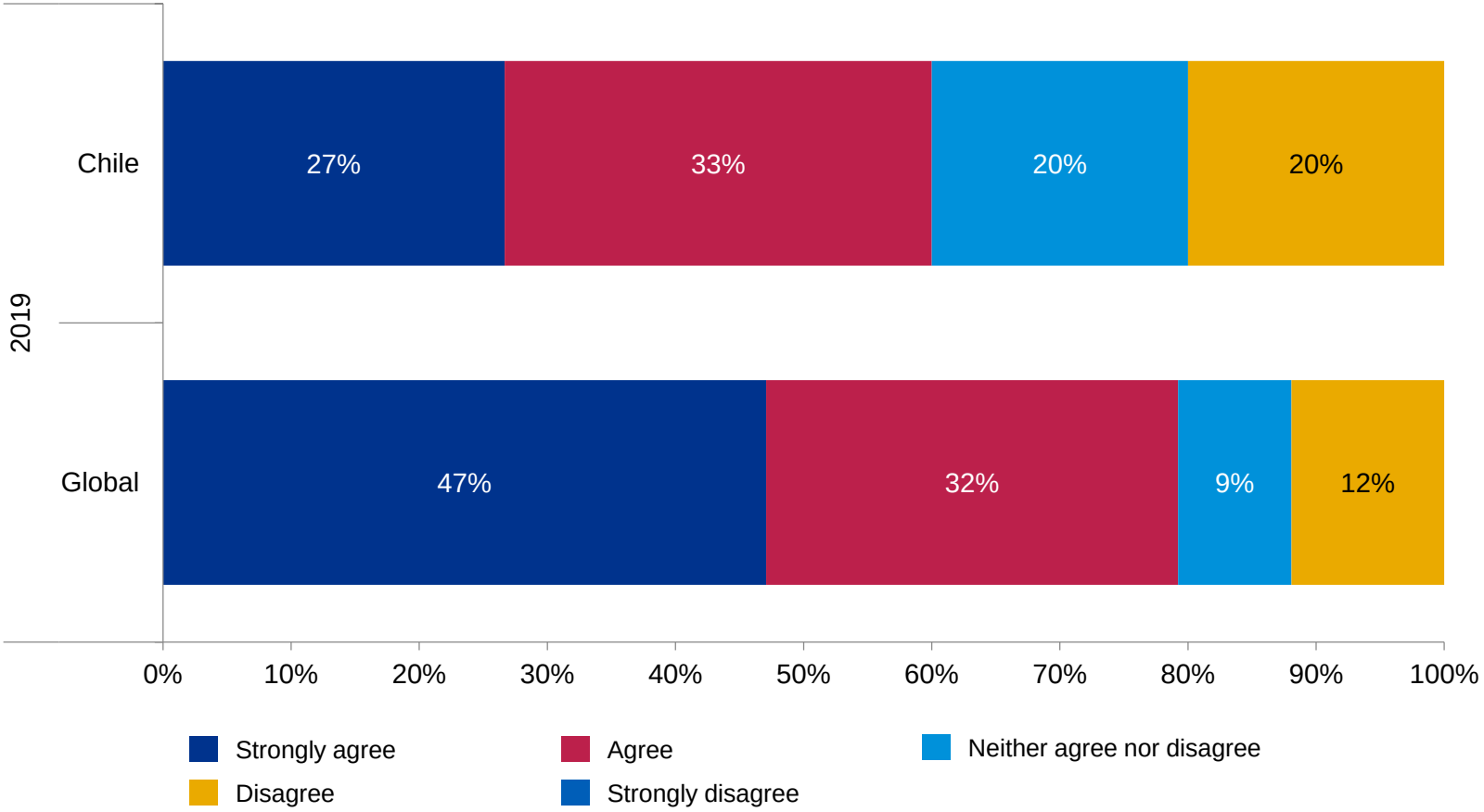
Q14. ¿En qué medida está de acuerdo con las siguientes afirmaciones sobre su supervisión de diferentes áreas funcionales?

A. Como director general, soy responsable de garantizar la conexión entre las oficinas centrales, intermedias y internas de una manera que mis antecesores no fueron



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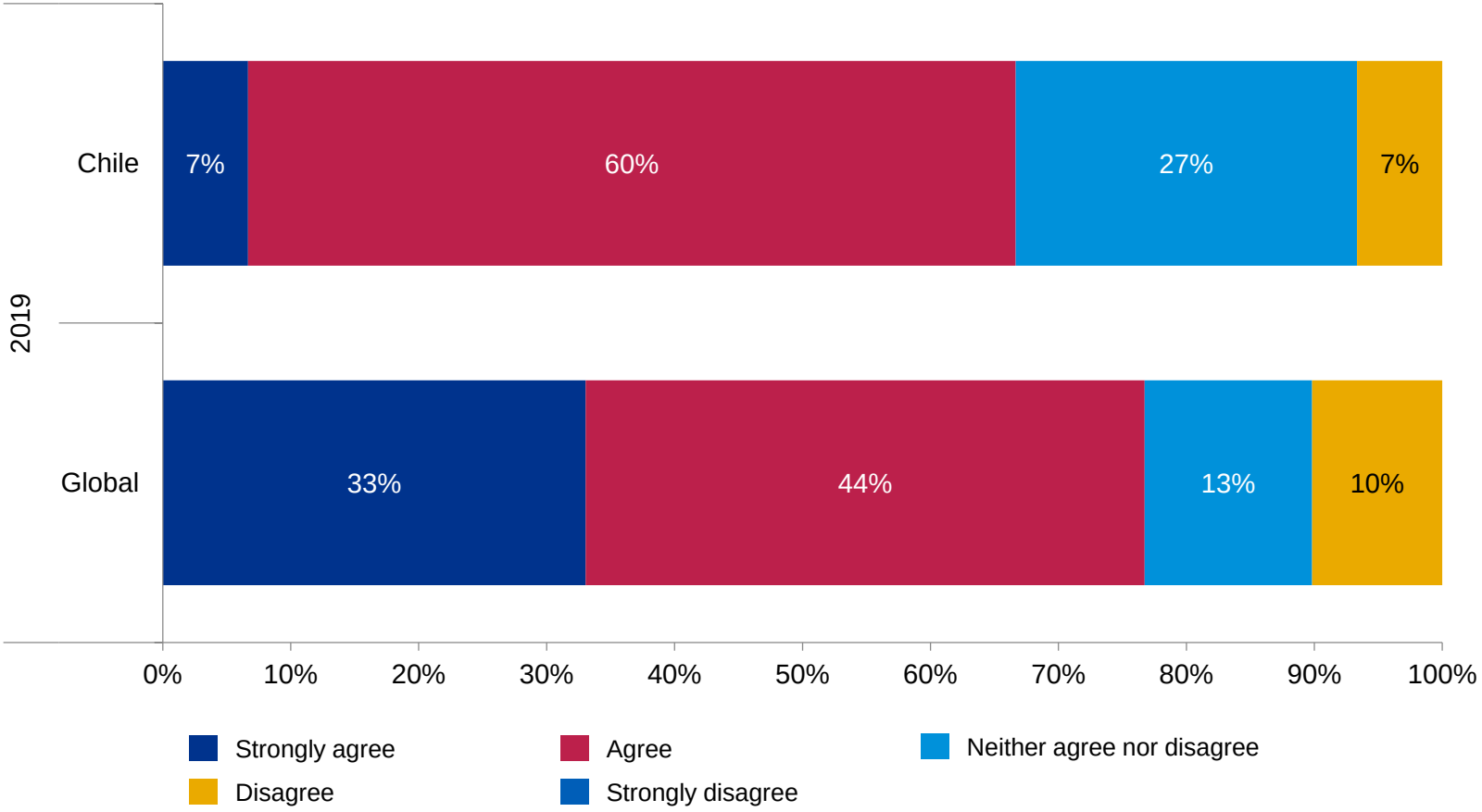
El líder resiliente

Q14. ¿En qué medida está de acuerdo con las siguientes afirmaciones sobre su supervisión de diferentes áreas funcionales?

B. Asegurarse de que la oficina central esté perfectamente conectada a la oficina central y administrativa es clave para crear una experiencia de marca y cliente más sólida



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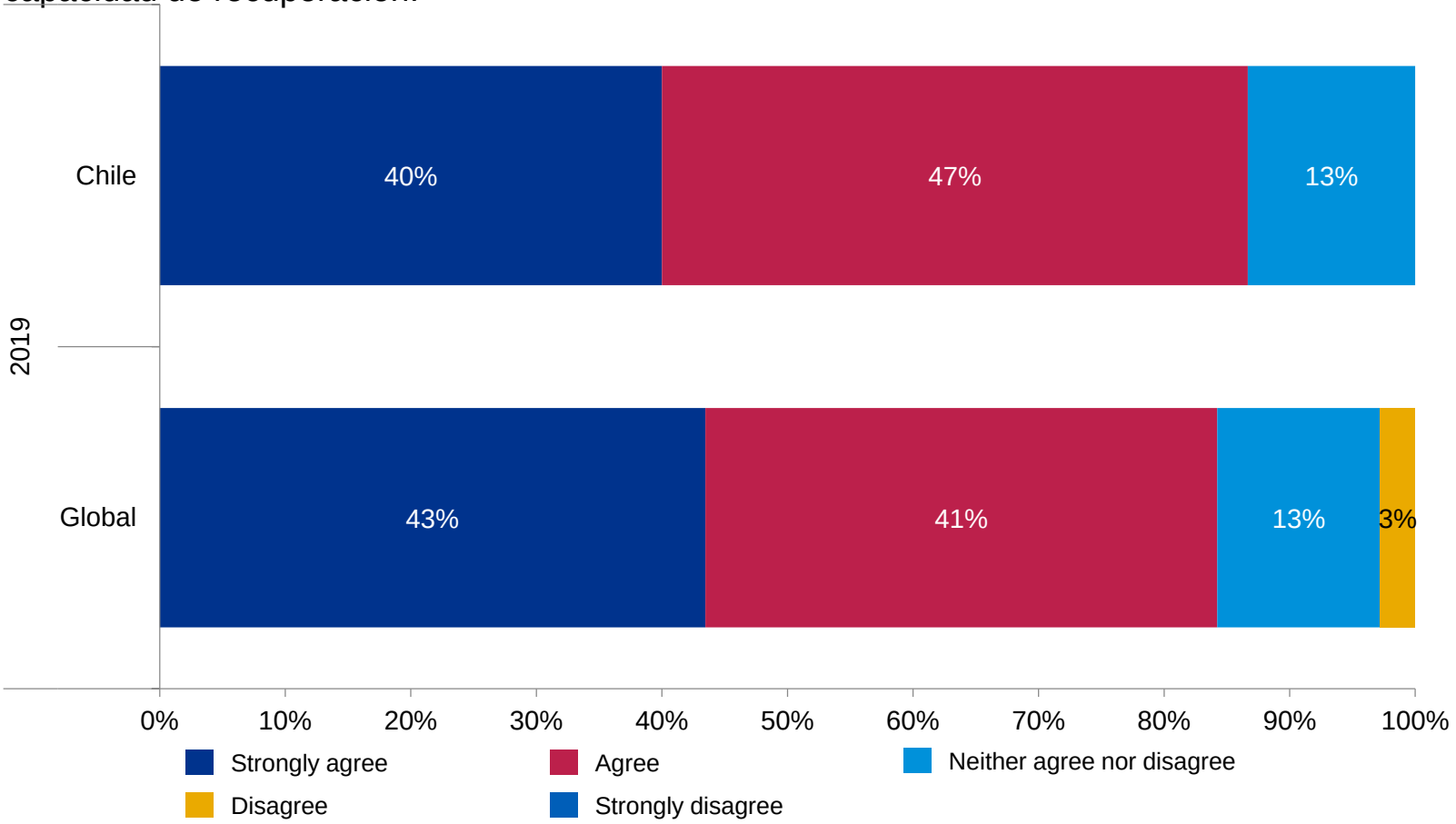
El líder resiliente

Q14. ¿En qué medida está de acuerdo con las siguientes afirmaciones sobre su supervisión de diferentes áreas funcionales?

C. Estoy transformando activamente nuestro equipo de liderazgo para fortalecer nuestra capacidad de recuperación.



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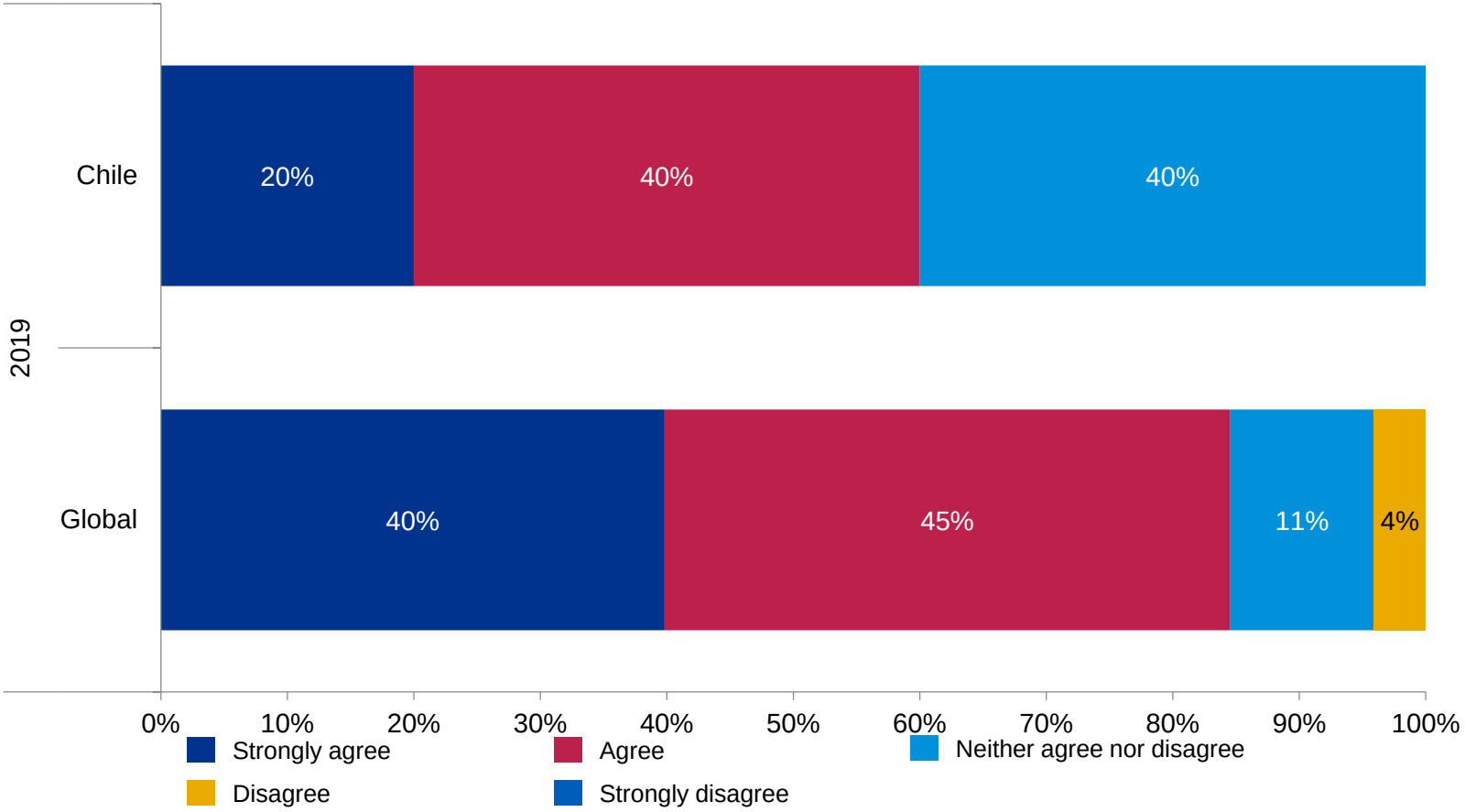
Q15. ¿En qué medida está de acuerdo con las siguientes afirmaciones con respecto a su participación en la estrategia de tecnología de su organización y su confianza en la tecnología de nube?

A. Personalmente estoy liderando la estrategia tecnológica para nuestra organización.



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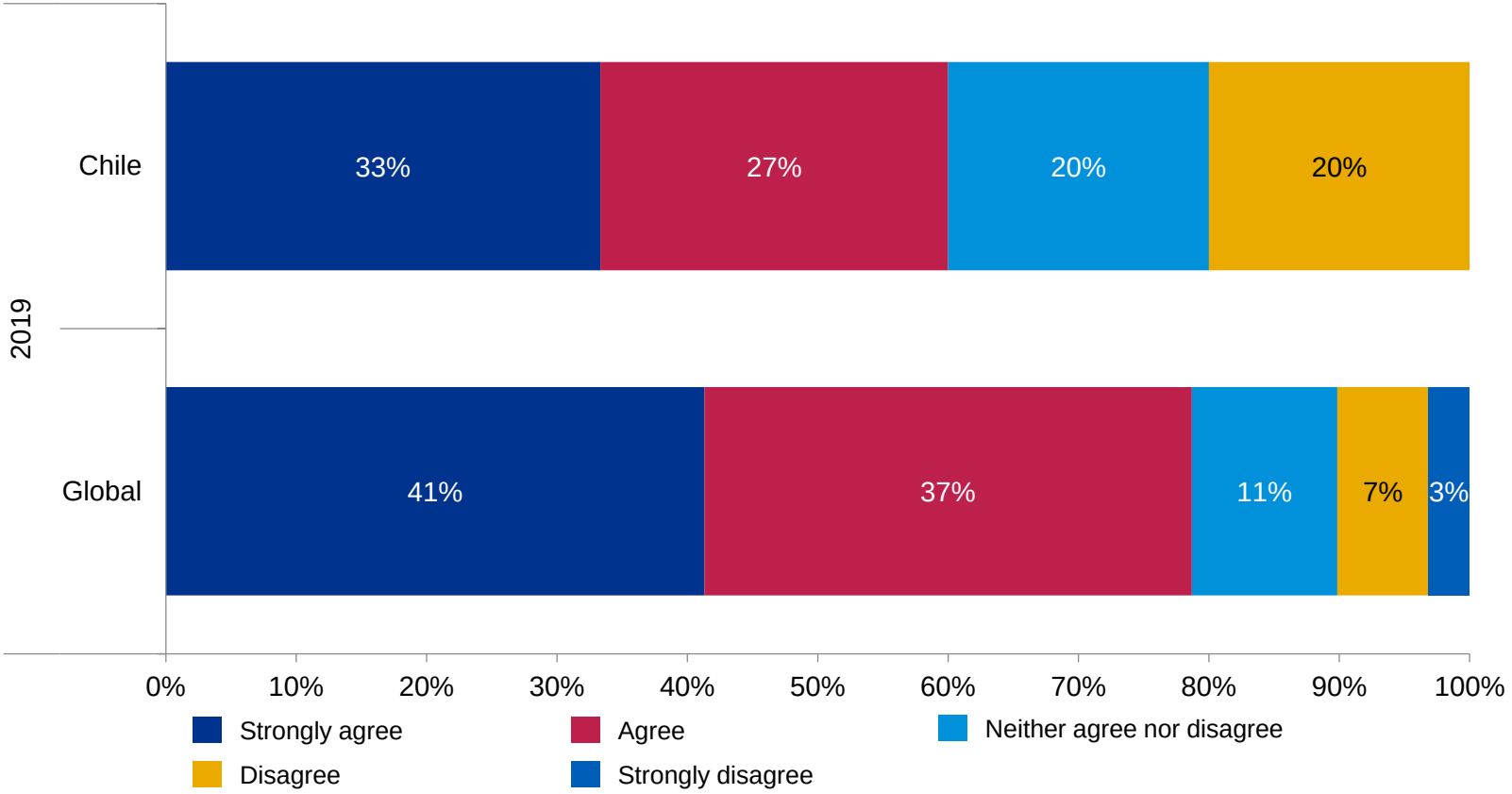
El líder resiliente

Q15. ¿En qué medida está de acuerdo con las siguientes afirmaciones con respecto a su participación en la estrategia de tecnología de su organización y su confianza en la tecnología de nube?

B. Confío más en aumentar el uso de las tecnologías en la nube hoy que en cualquier otro momento en los últimos 3 años.



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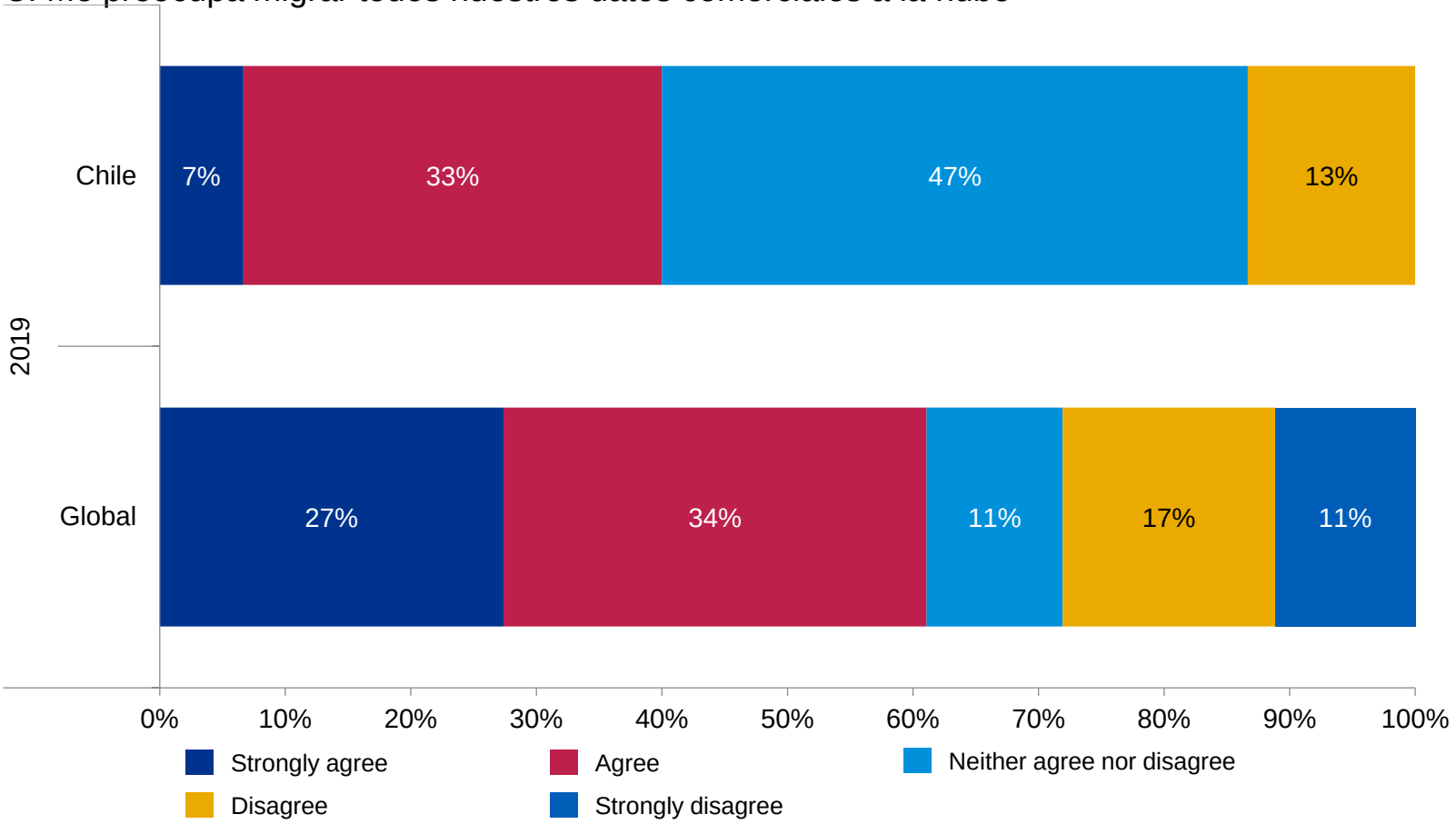
El líder resiliente

Q15. ¿En qué medida está de acuerdo con las siguientes afirmaciones con respecto a su participación en la estrategia de tecnología de su organización y su confianza en la tecnología de nube?

C. Me preocupa migrar todos nuestros datos comerciales a la nube



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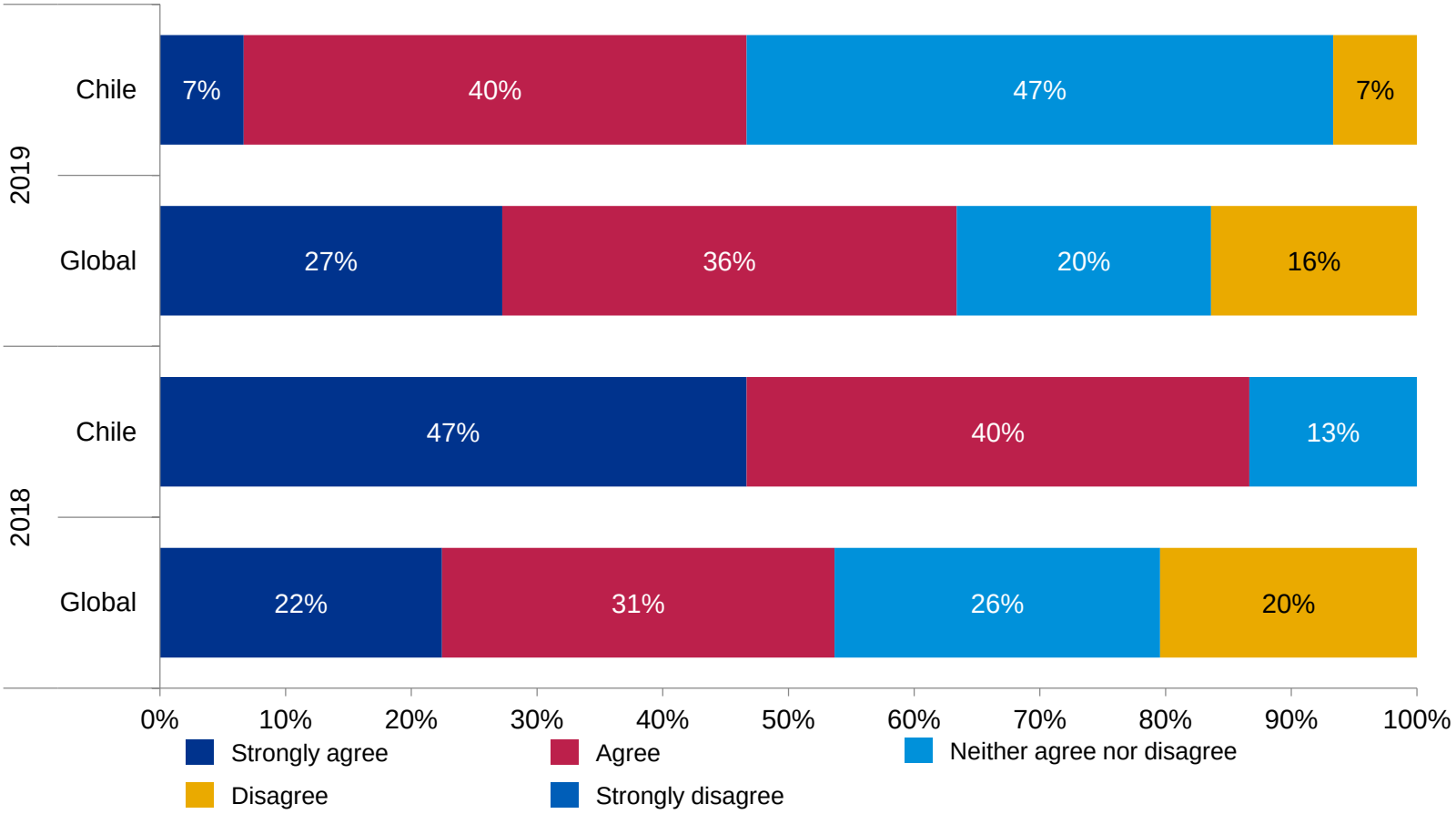
La presión en curso para interrumpir

La presión en curso para interrumpir

Q16A. ¿En qué medida está de acuerdo con las siguientes afirmaciones sobre la interrupción?

A. En lugar de esperar a ser interrumpido por competidores, mi organización está interrumpiendo activamente el sector en el que operamos



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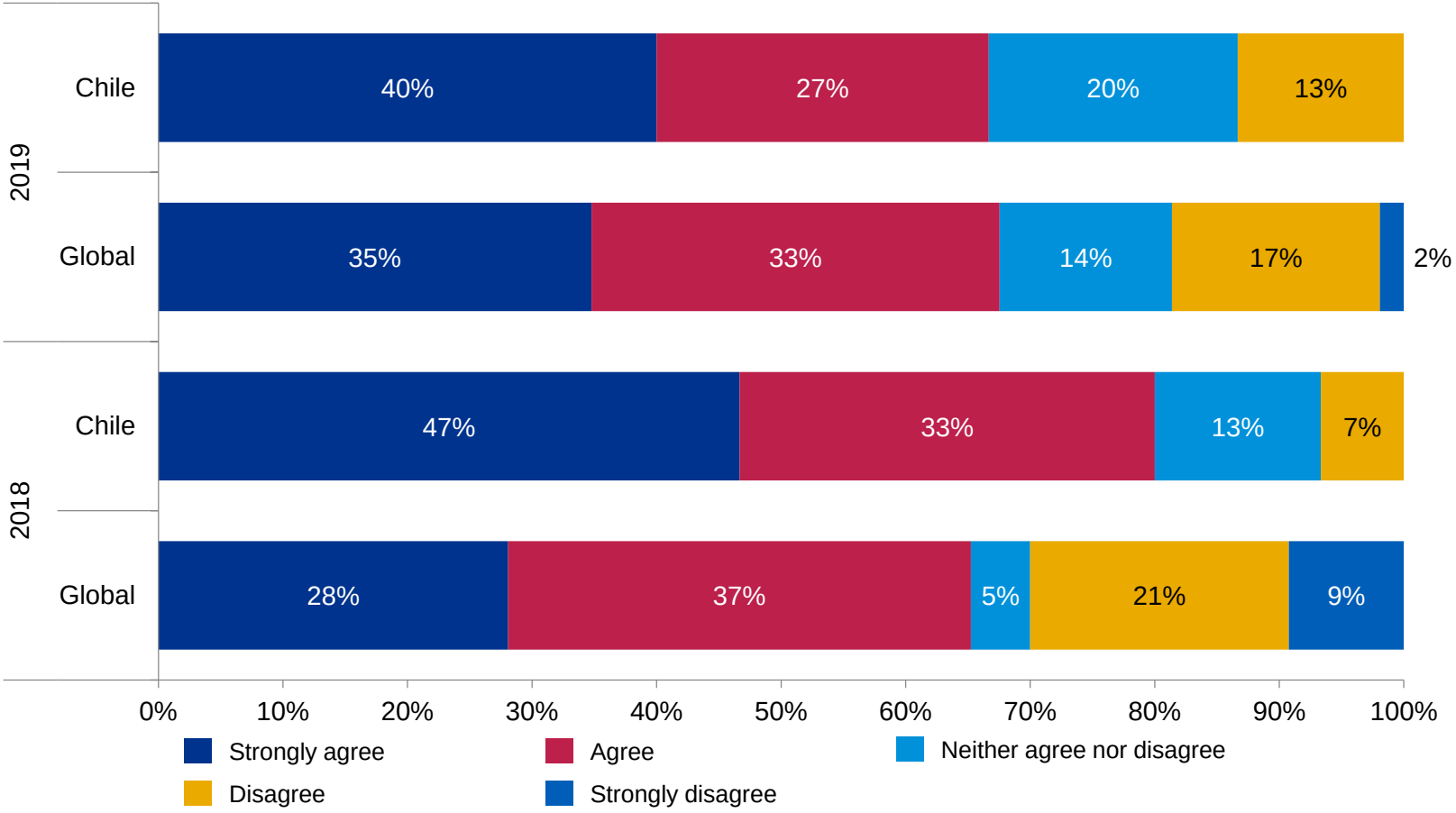
Q16A. ¿En qué medida está de acuerdo con las siguientes afirmaciones sobre la interrupción?

B. Los plazos para lograr un progreso significativo en la transformación a menudo parecen abrumadores



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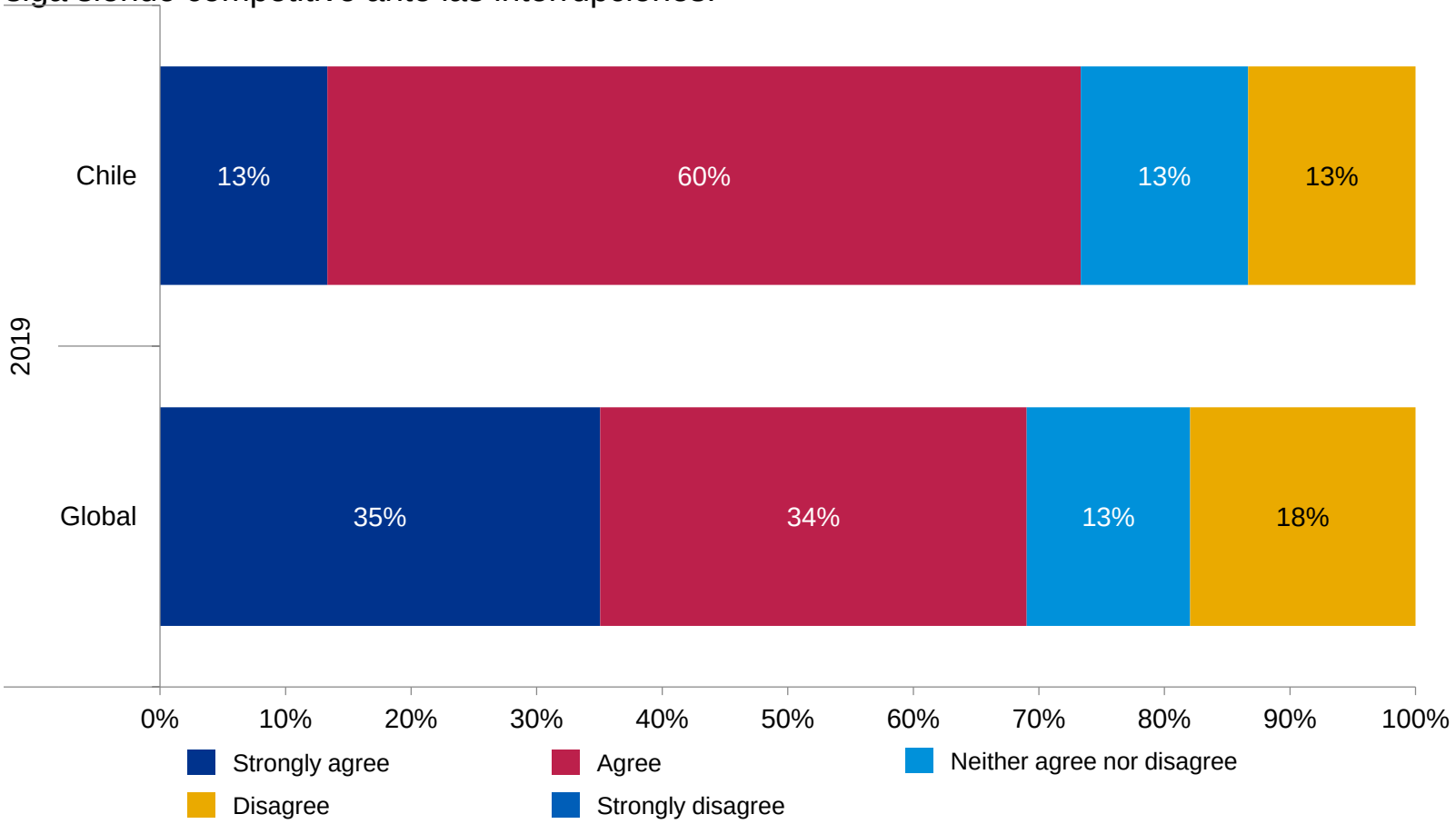
Q16A. ¿En qué medida está de acuerdo con las siguientes afirmaciones sobre la interrupción?

C. Tenemos estructuras establecidas para revisar nuestro modelo de negocio y garantizar que siga siendo competitivo ante las interrupciones.



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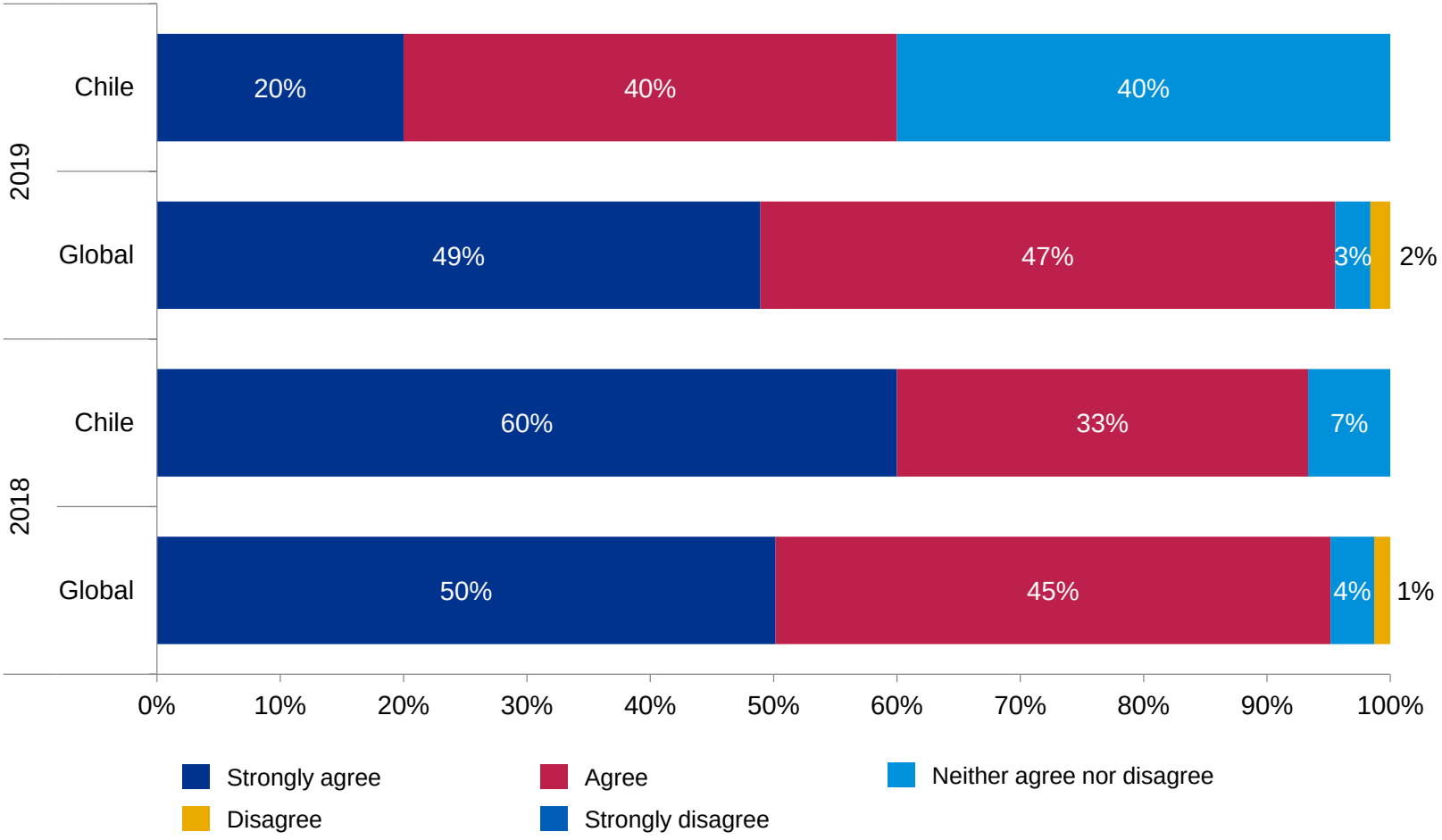
Q16B. ¿En qué medida está de acuerdo con las siguientes afirmaciones sobre cómo la interrupción tecnológica está afectando a su negocio?

A. Consideramos que la interrupción tecnológica es más una oportunidad que una amenaza.



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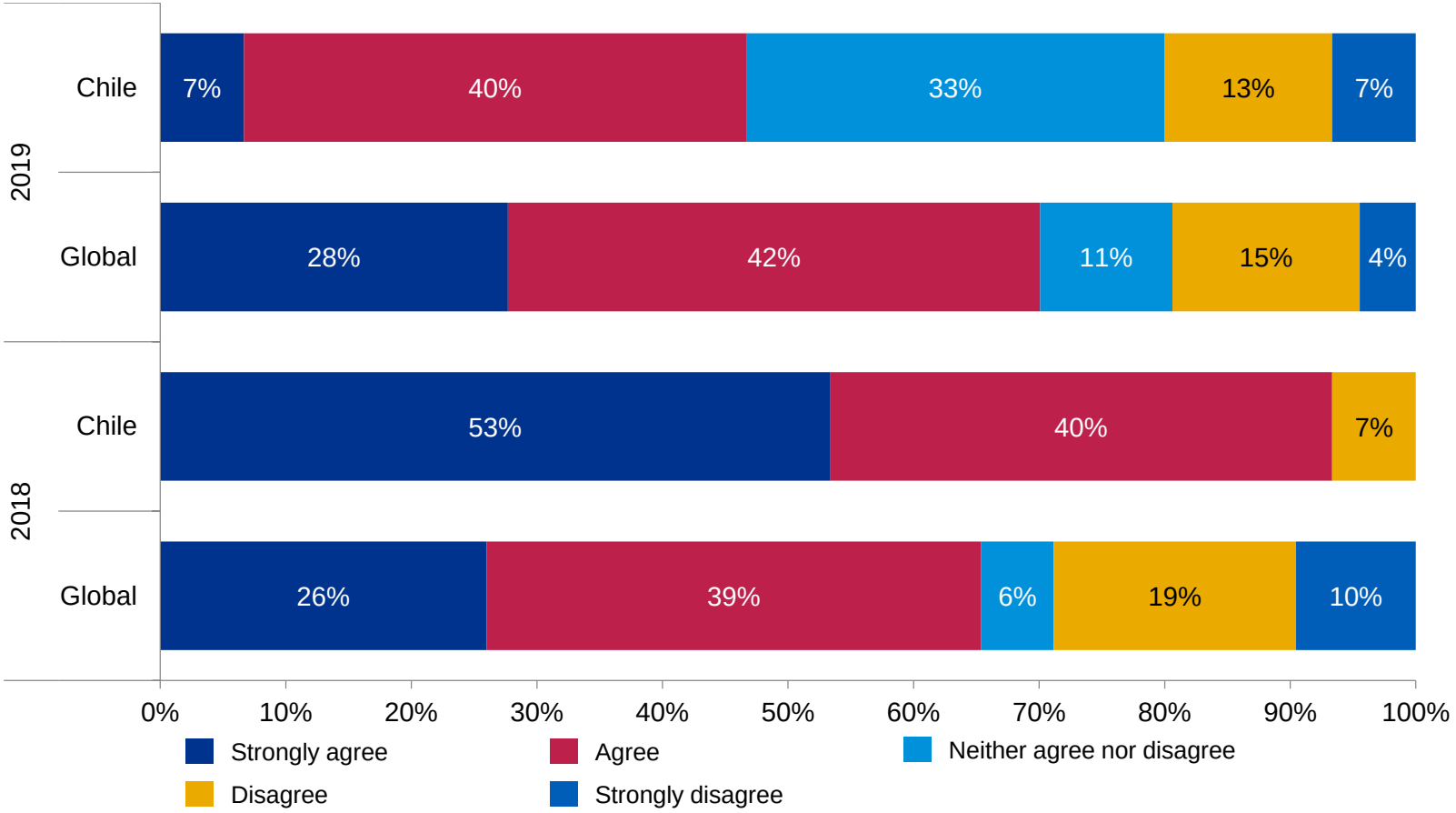
Q16B. ¿En qué medida está de acuerdo con las siguientes afirmaciones sobre cómo la interrupción tecnológica está afectando a su negocio?

B. La tecnología de rápido avance no es la única interrupción significativa que enfrenta mi negocio



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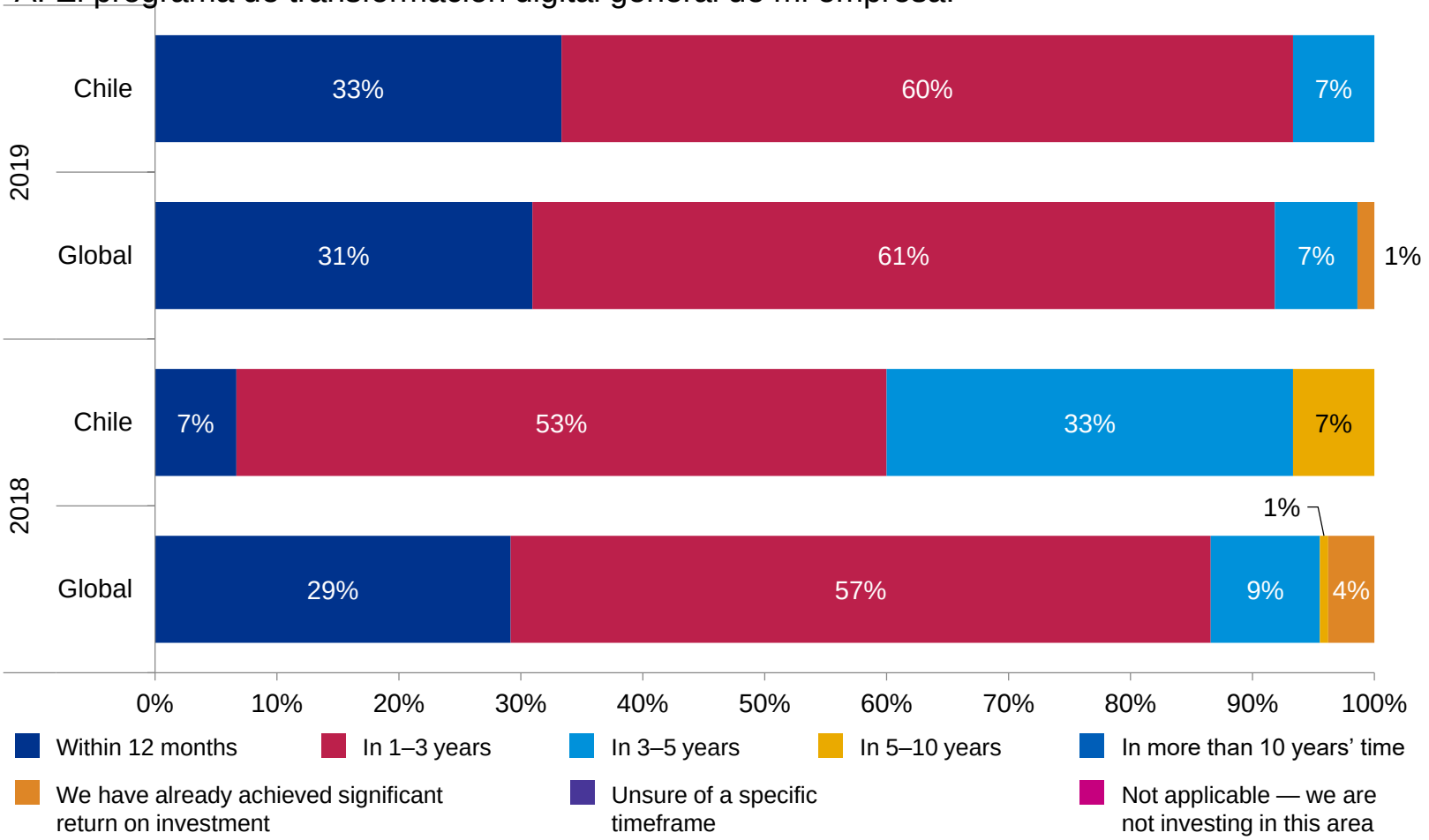
Q17. ¿En qué período de tiempo espera obtener un retorno significativo de la inversión de a) transformación digital, b) inteligencia artificial yc) automatización de procesos robóticos?

A. El programa de transformación digital general de mi empresa.



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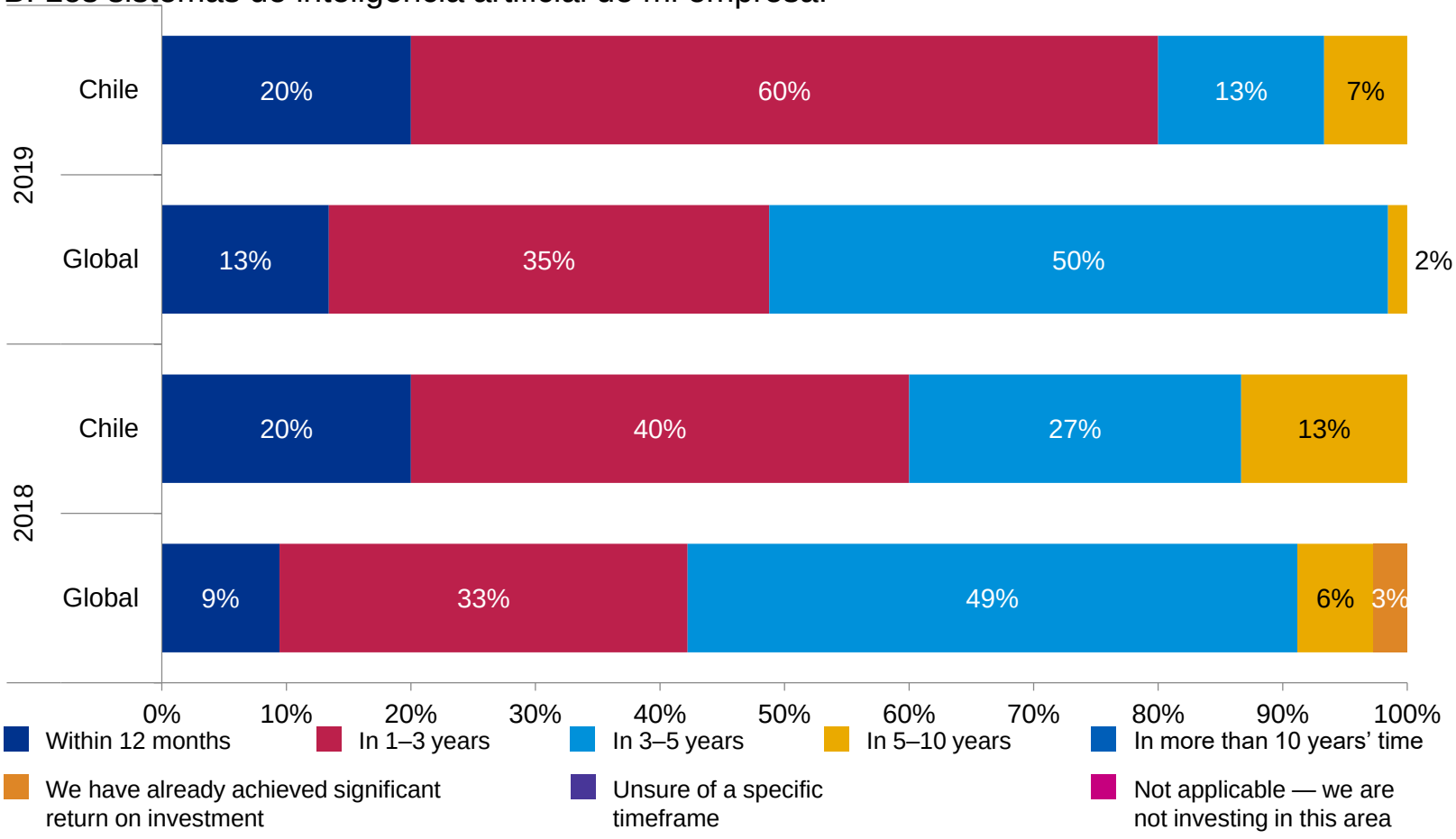
Q17. ¿En qué período de tiempo espera obtener un retorno significativo de la inversión de a) transformación digital, b) inteligencia artificial yc) automatización de procesos robóticos?

B. Los sistemas de inteligencia artificial de mi empresa.



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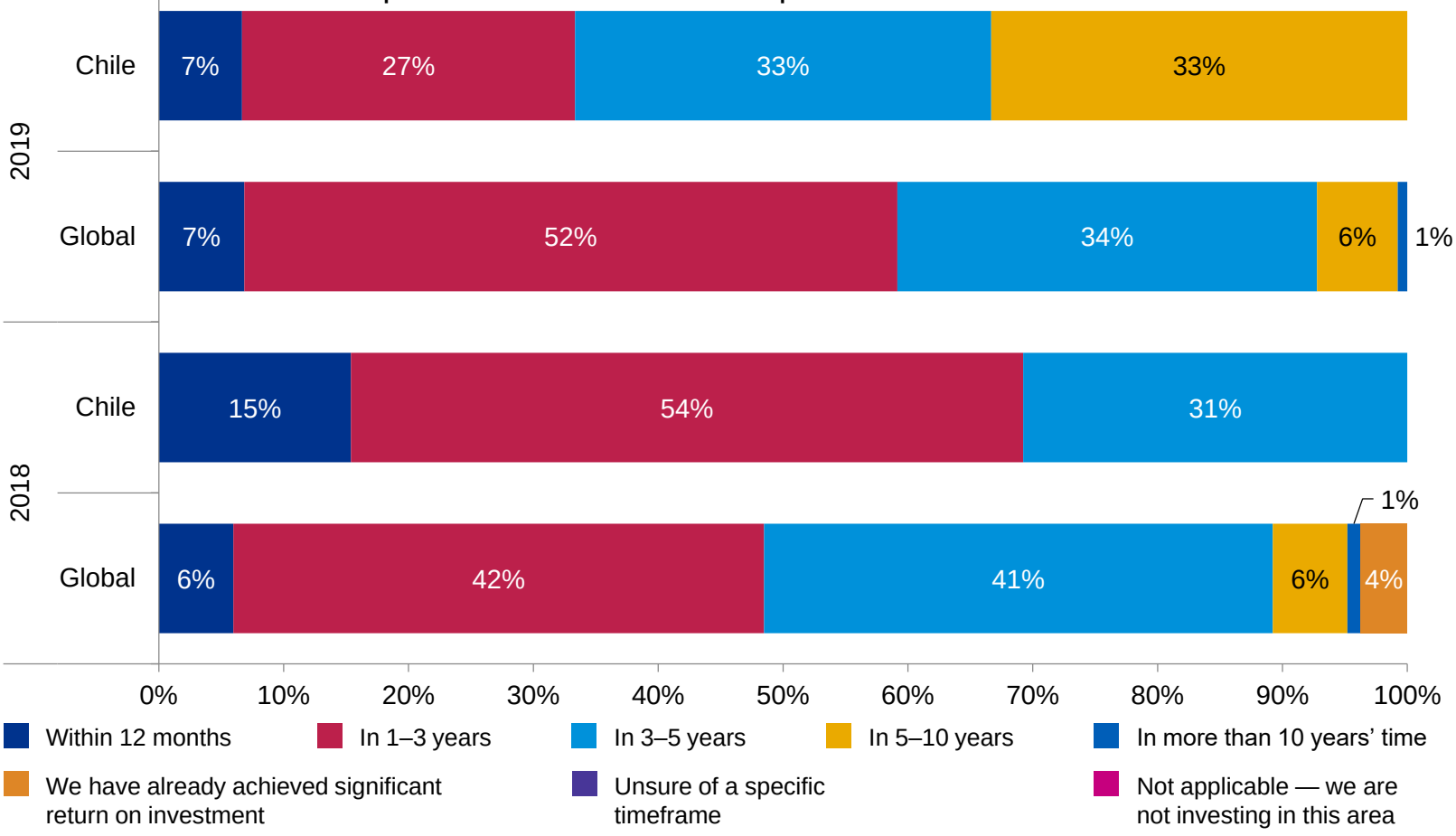
Q17. ¿En qué período de tiempo espera obtener un retorno significativo de la inversión de a) transformación digital, b) inteligencia artificial y c) automatización de procesos robóticos?

C. La automatización del proceso robótico de mi empresa.



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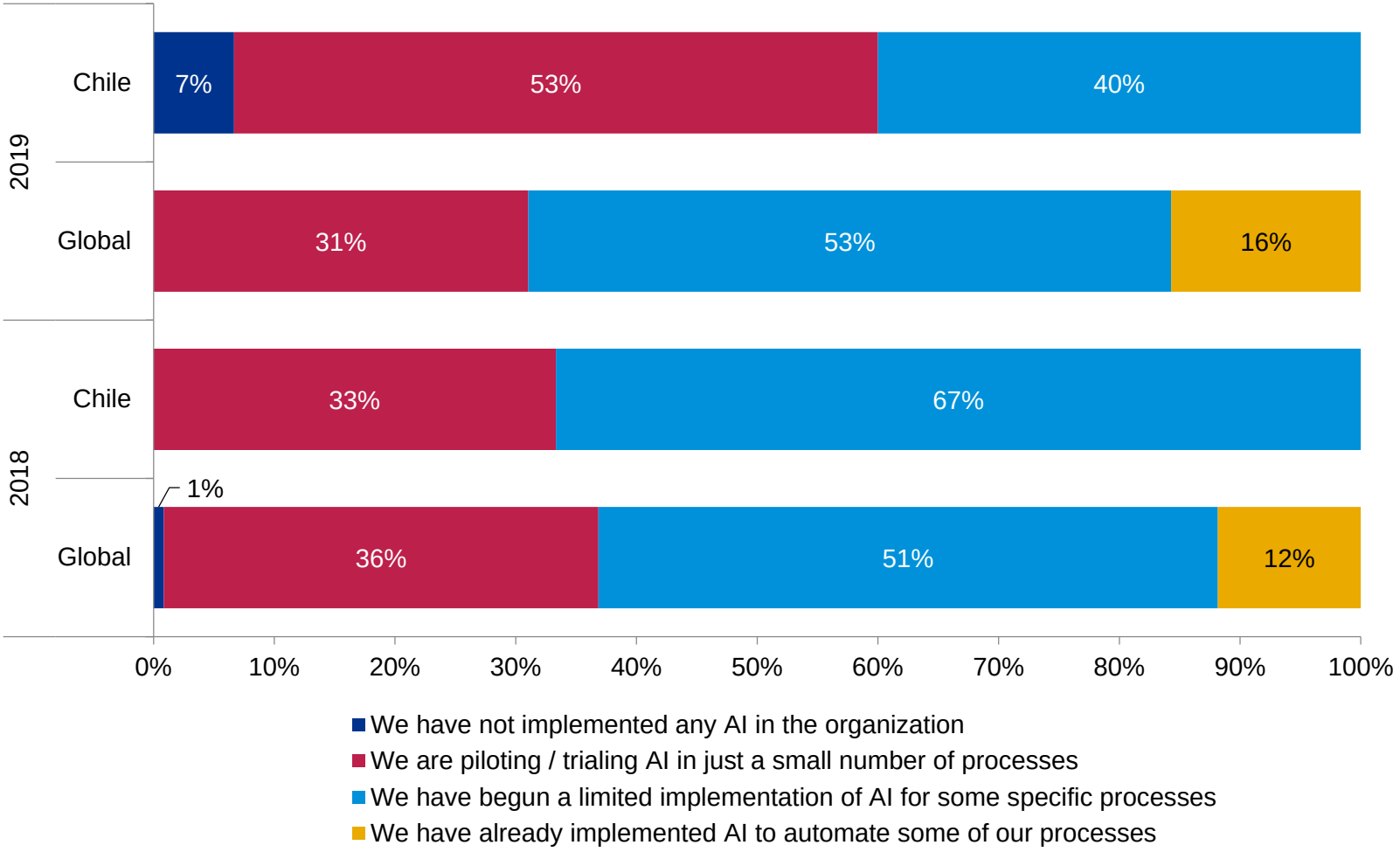
P18. ¿Cuál de las siguientes opciones describe mejor la aplicación de inteligencia artificial (IA) de su organización en la automatización de sus procesos en la actualidad?



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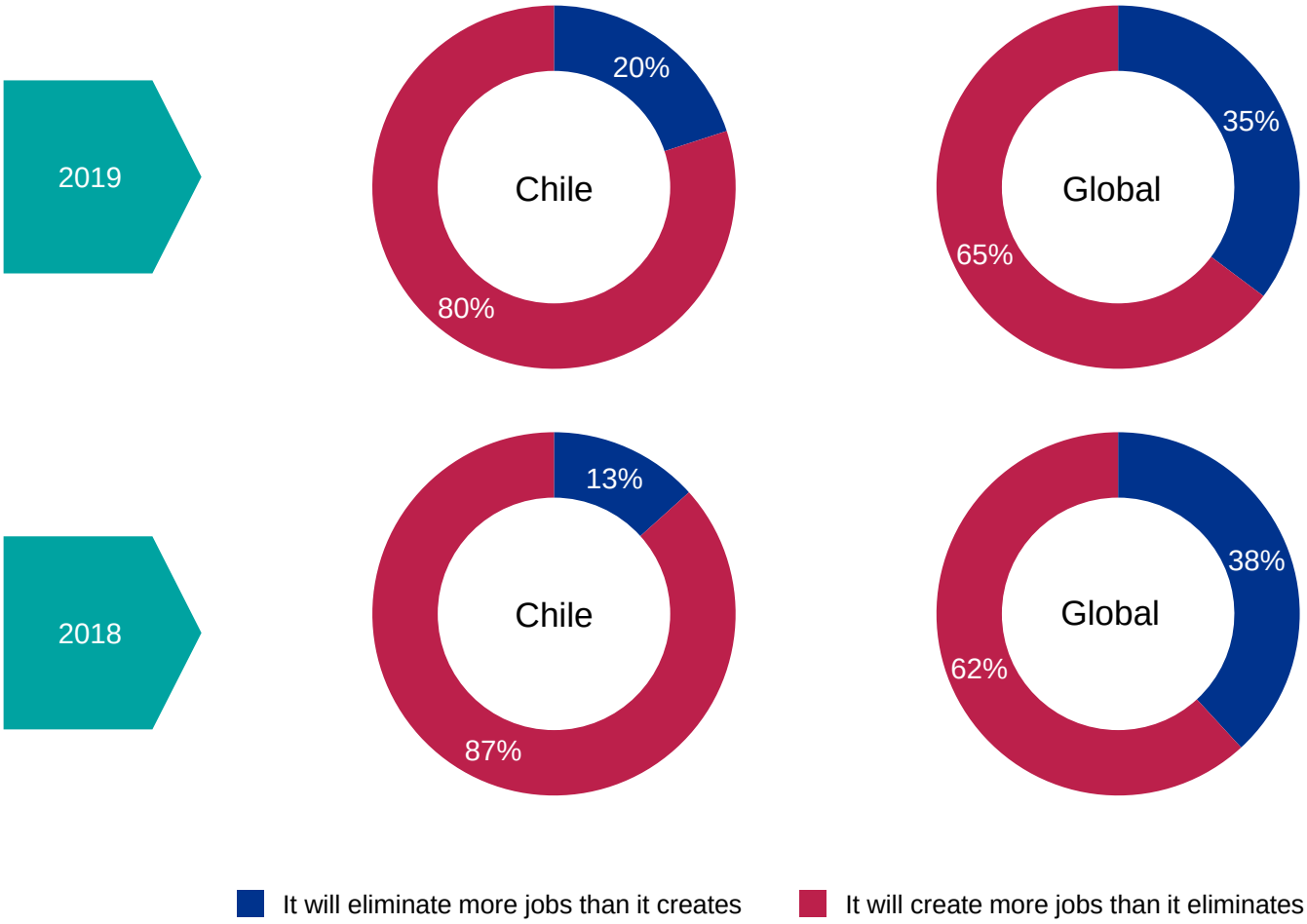
Q19. En los próximos 3 años, ¿cuál de los siguientes es el impacto más probable de la inteligencia artificial y las tecnologías robóticas en su organización?



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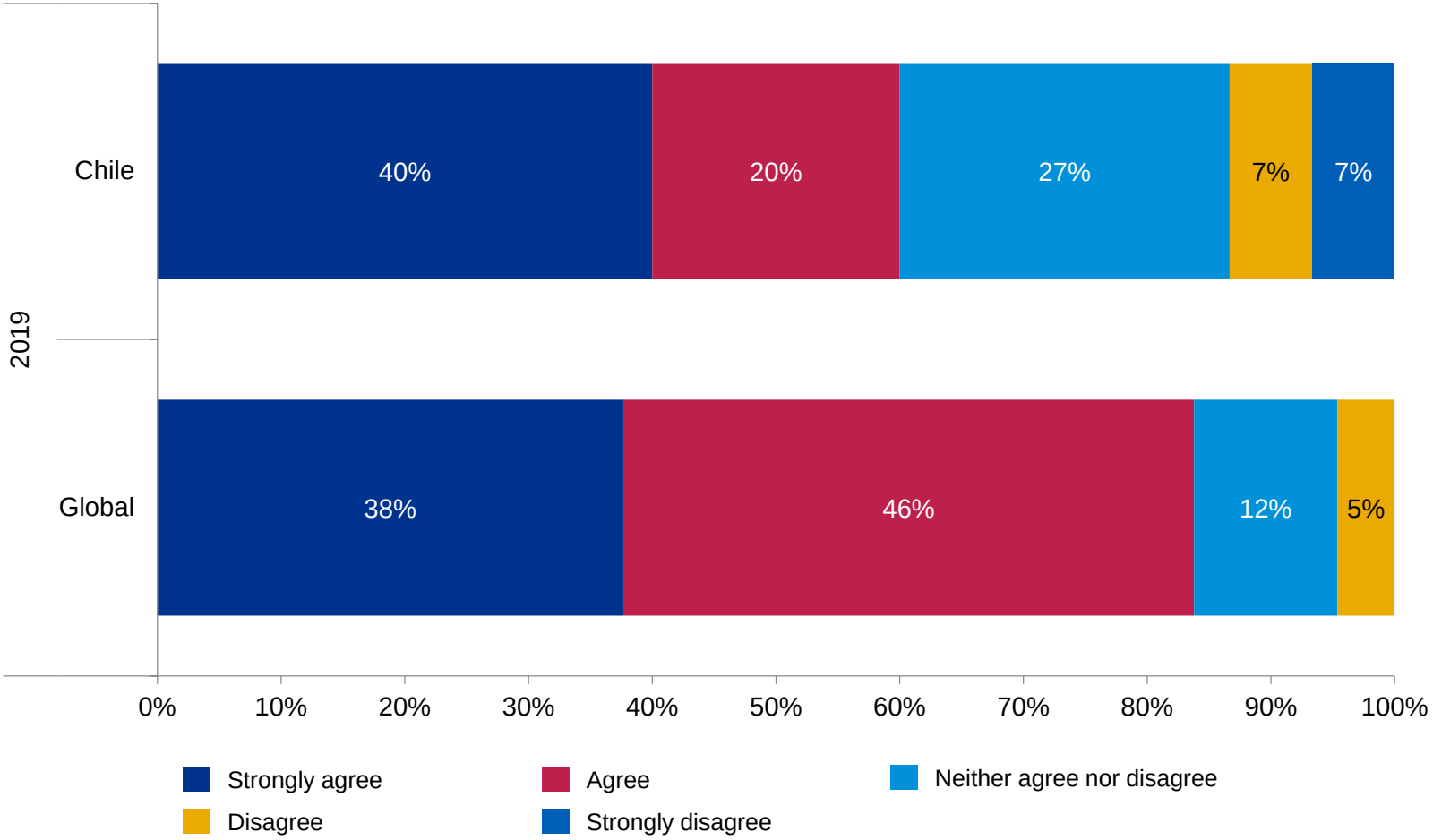
Q20. ¿En qué medida está de acuerdo con las siguientes afirmaciones?

A. Quiero que mis empleados se sientan capaces de innovar, sin preocuparse por las consecuencias negativas para ellos si la iniciativa falla.



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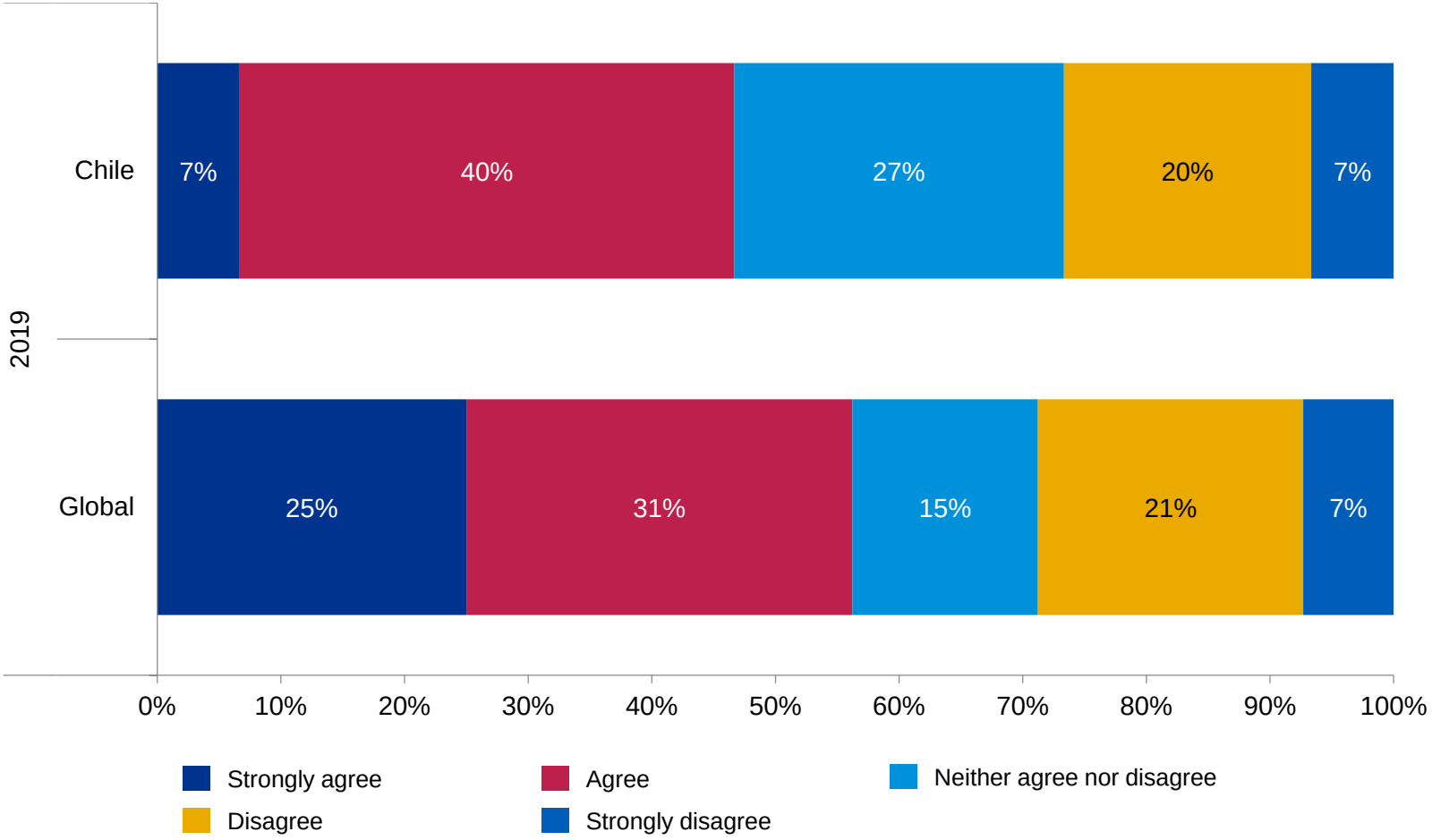
Q20. ¿En qué medida está de acuerdo con las siguientes afirmaciones?

B. Nuestra organización tiene una cultura en la que se celebran iniciativas de innovación fallidas "de rápido fracaso"



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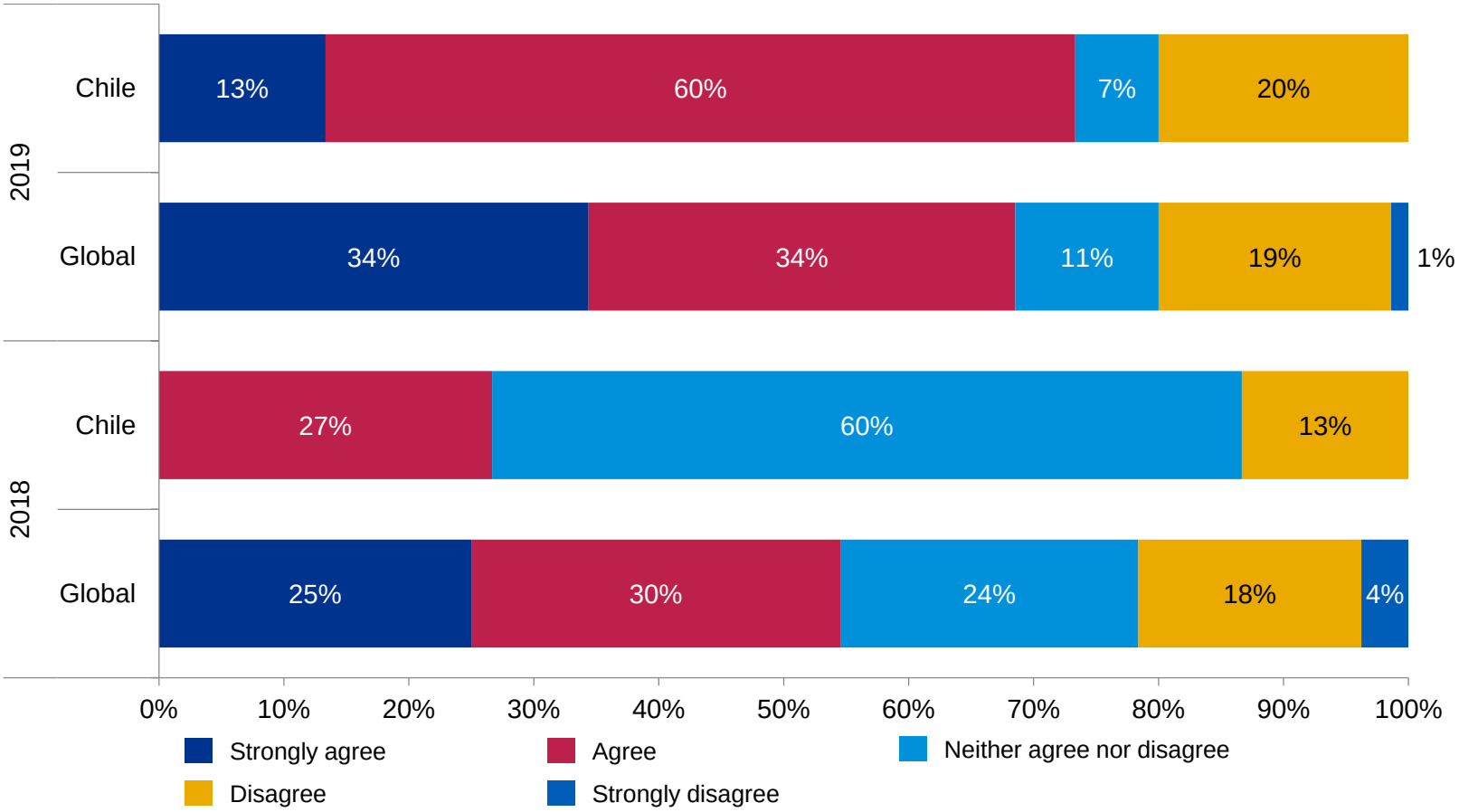
La organización resiliente

La organización resiliente

Q21. ¿En qué medida está de acuerdo con las siguientes afirmaciones sobre el ciberespacio?

A. Una estrategia cibernética sólida es fundamental para generar confianza con nuestros grupos de interés clave



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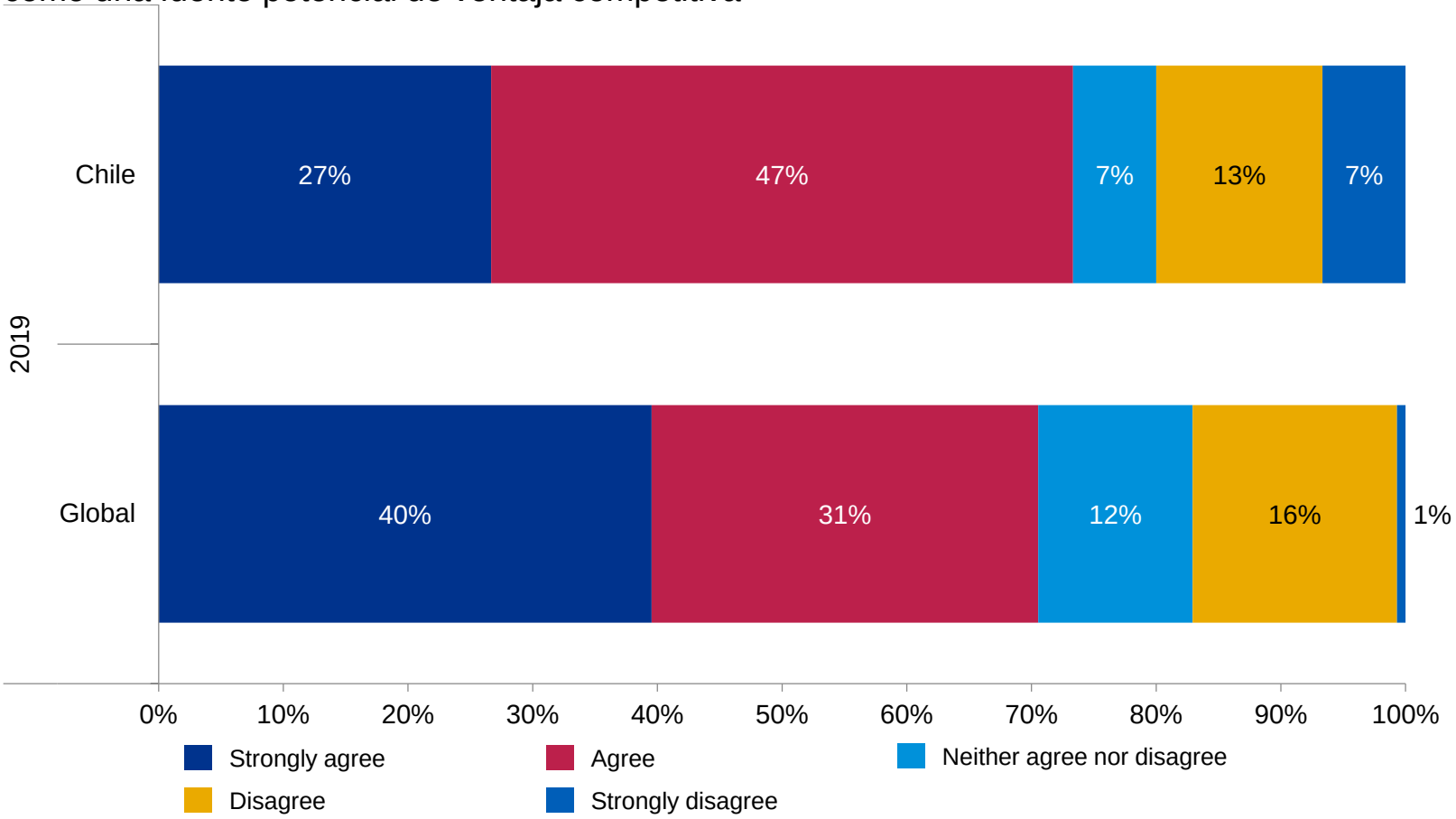
La organización resiliente

Q21. ¿En qué medida está de acuerdo con las siguientes afirmaciones sobre el ciberespacio?

B. Mi organización considera la seguridad de la información como una función estratégica y como una fuente potencial de ventaja competitiva



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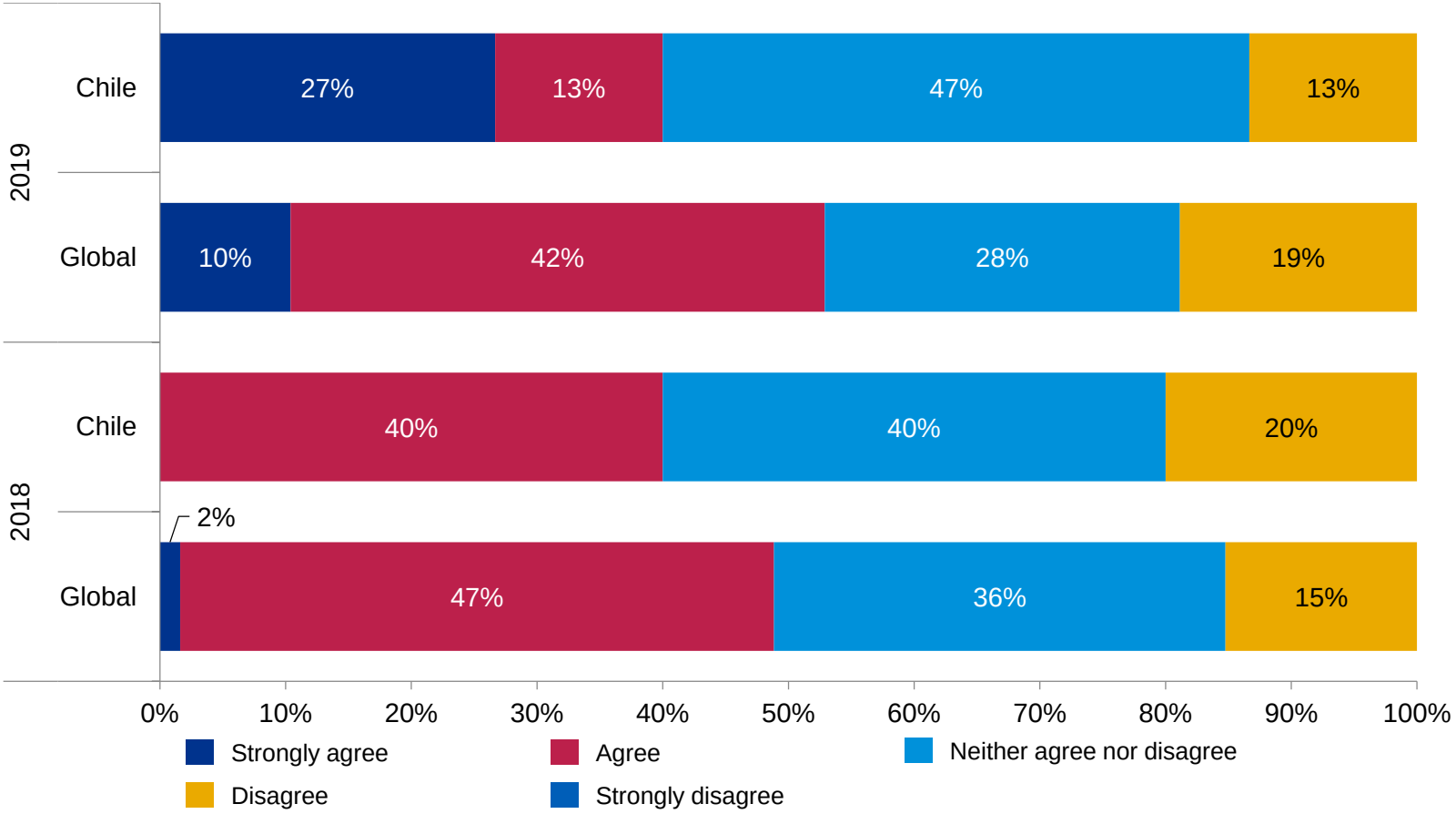
La organización resiliente

Q21. ¿En qué medida está de acuerdo con las siguientes afirmaciones sobre el ciberespacio?

C. Convertirse en víctima de un ataque cibernético es ahora un caso de "cuándo", y no "si", para nuestra organización



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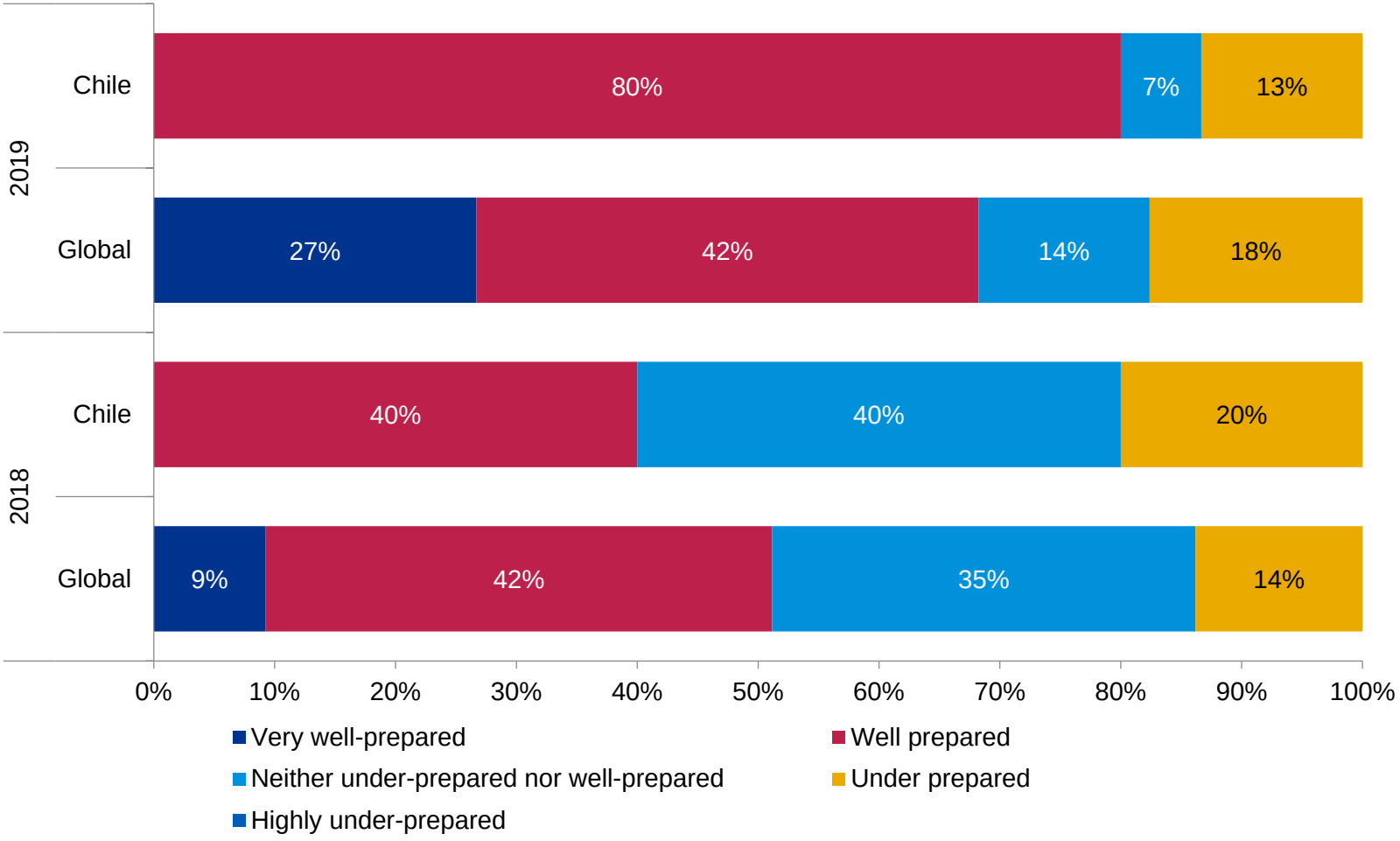
La organización resiliente

P22. ¿Qué tan bien preparada está su organización para un futuro ataque cibernético?



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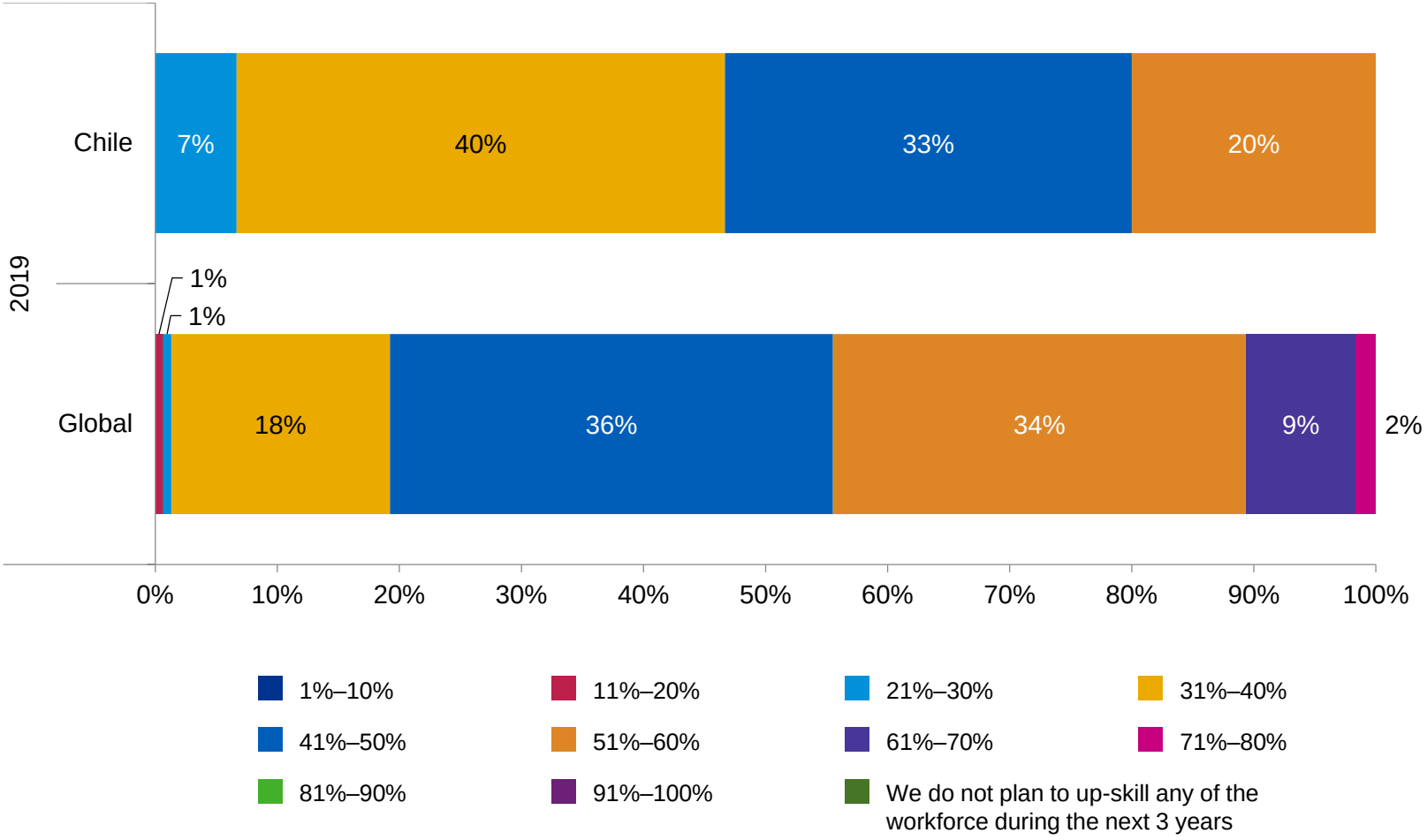
La organización resiliente

Q23. ¿Qué proporción de la fuerza laboral actual de su organización planea mejorar sus habilidades en nuevas capacidades digitales (como visualización avanzada de datos, capacidad de codificación, etc.) durante los próximos 3 años?



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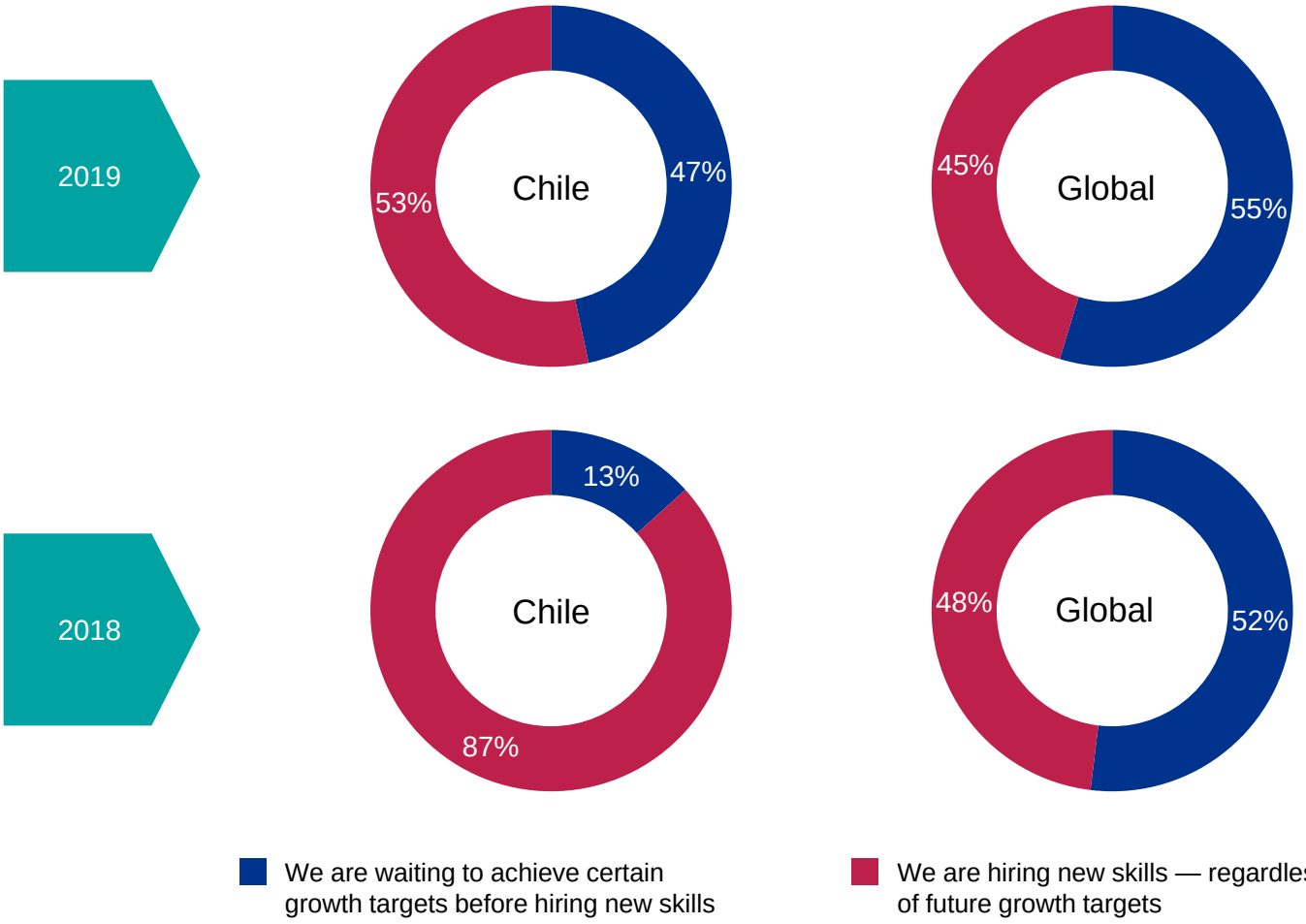
La organización resiliente

Q24. ¿Cuál de las siguientes opciones describe mejor el enfoque de su organización para reclutar nuevos conjuntos de habilidades en la organización?



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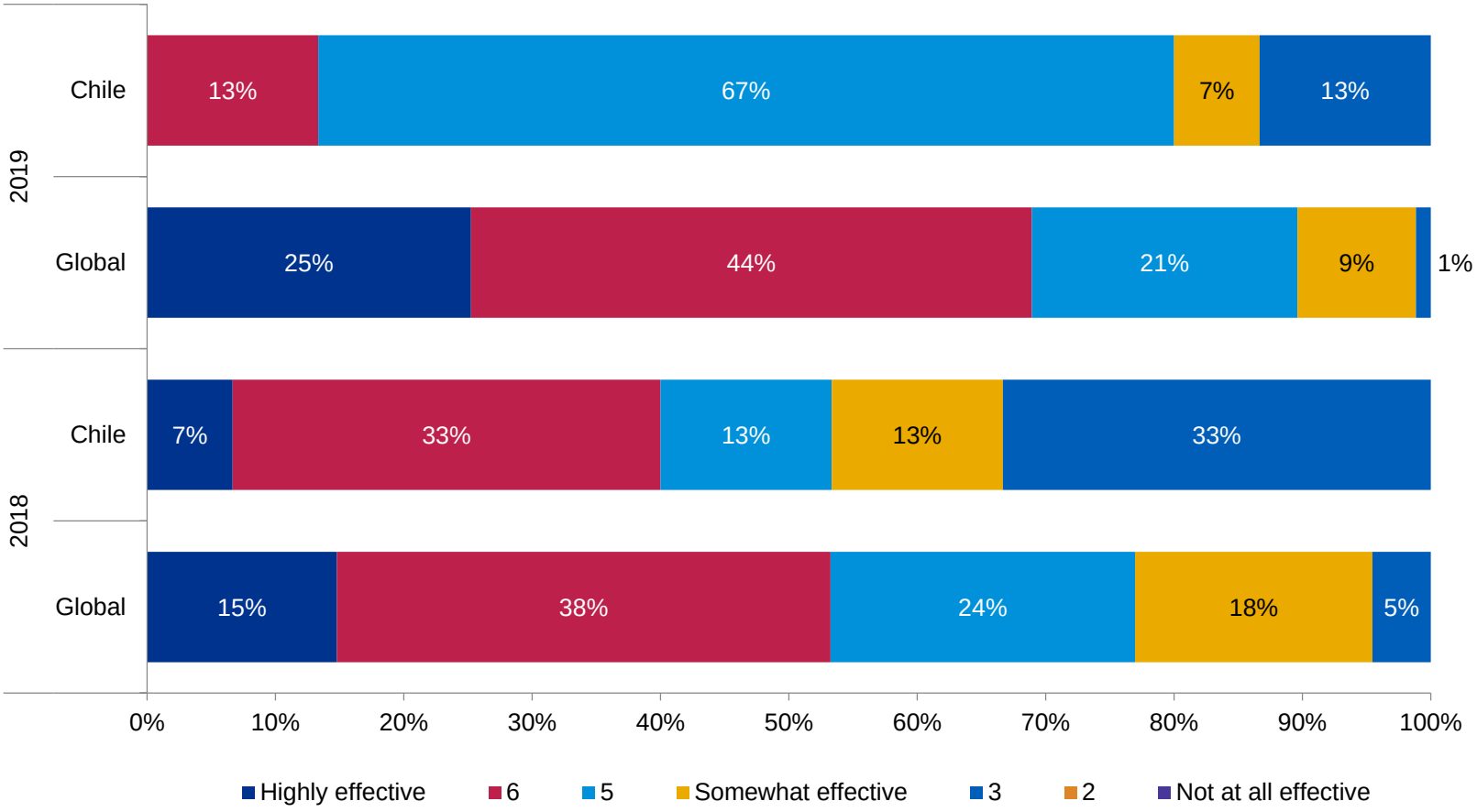
La organización resiliente

Q25. ¿Y qué tan efectiva es la fuerza laboral de su empresa en estas áreas?

A. Especialistas en seguridad cibernética



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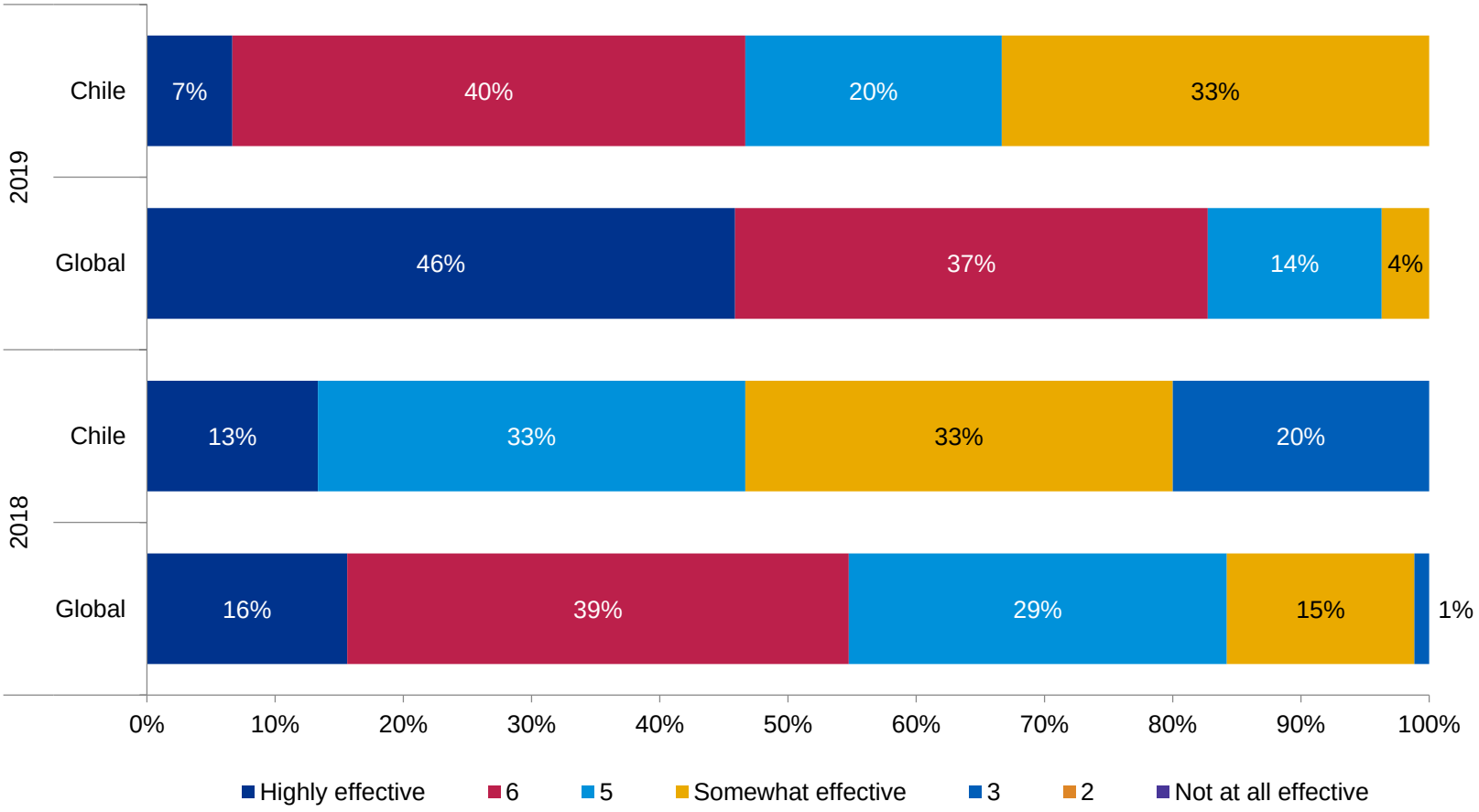
La organización resiliente

Q25. ¿Y qué tan efectiva es la fuerza laboral de su empresa en estas áreas?

B. datos científicos



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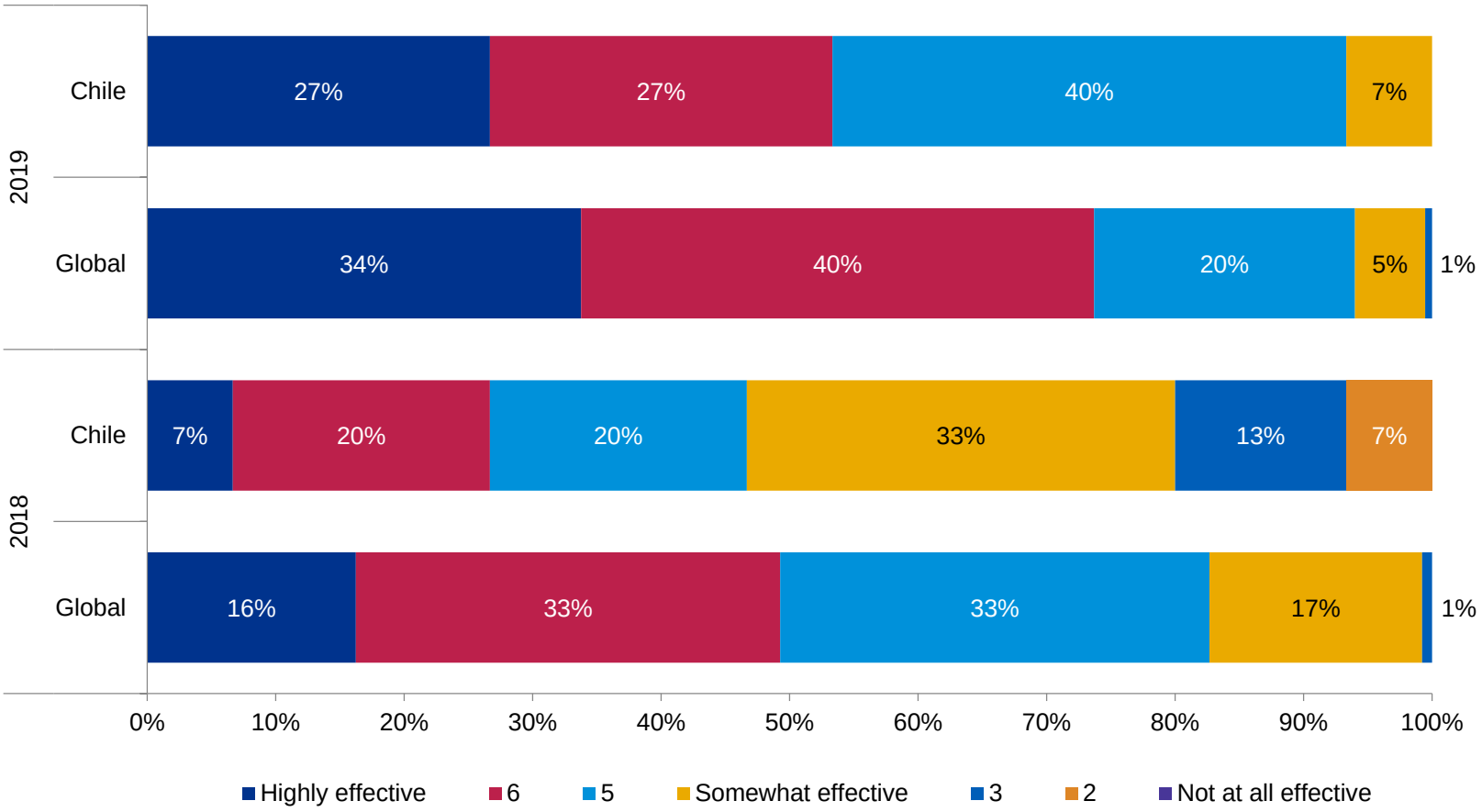
La organización resiliente

Q25. ¿Y qué tan efectiva es la fuerza laboral de su empresa en estas áreas?

C. Especialistas en tecnología emergente (es decir, expertos en inteligencia artificial)



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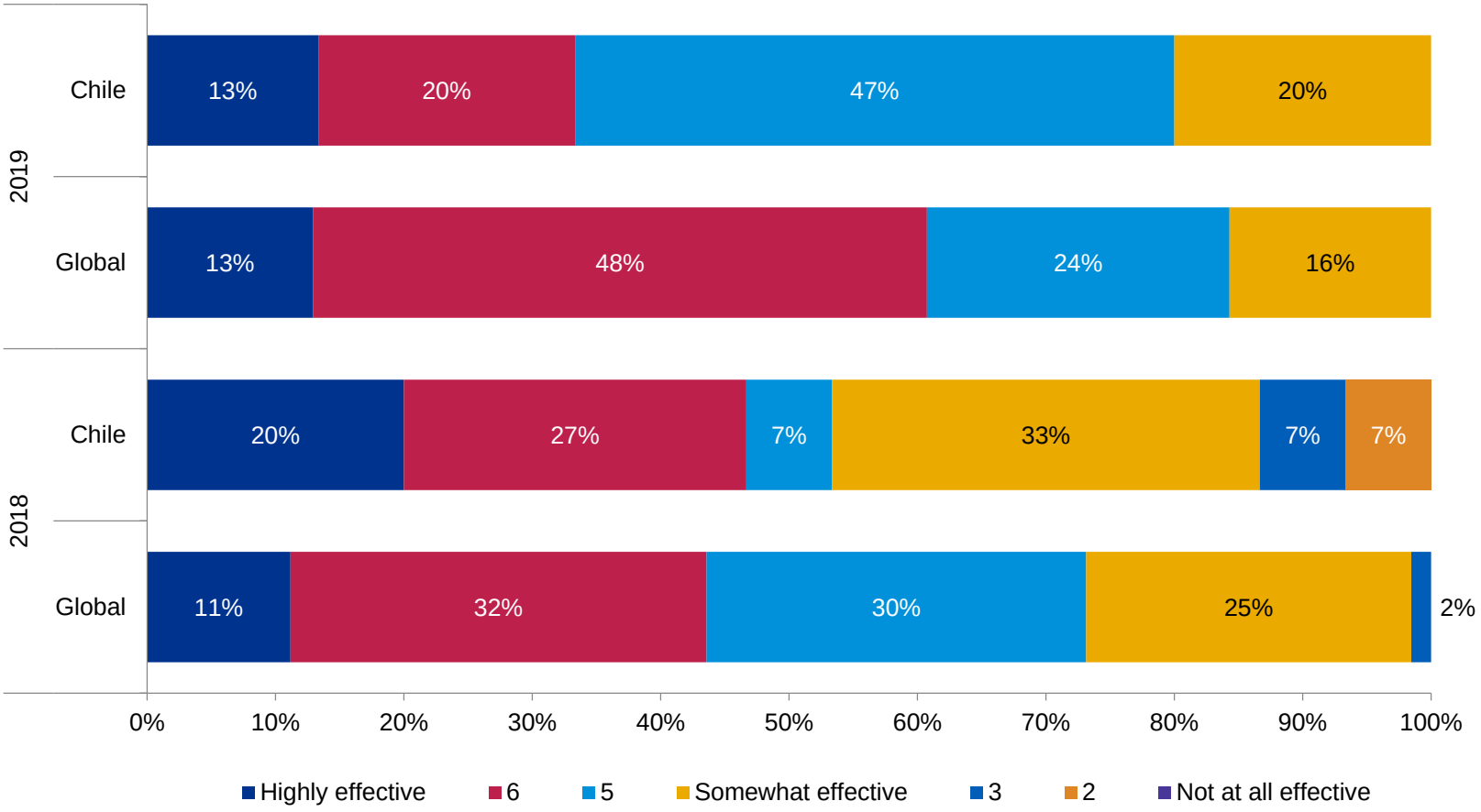
La organización resiliente

Q25. ¿Y qué tan efectiva es la fuerza laboral de su empresa en estas áreas?

D. Gerentes de transformación digital.



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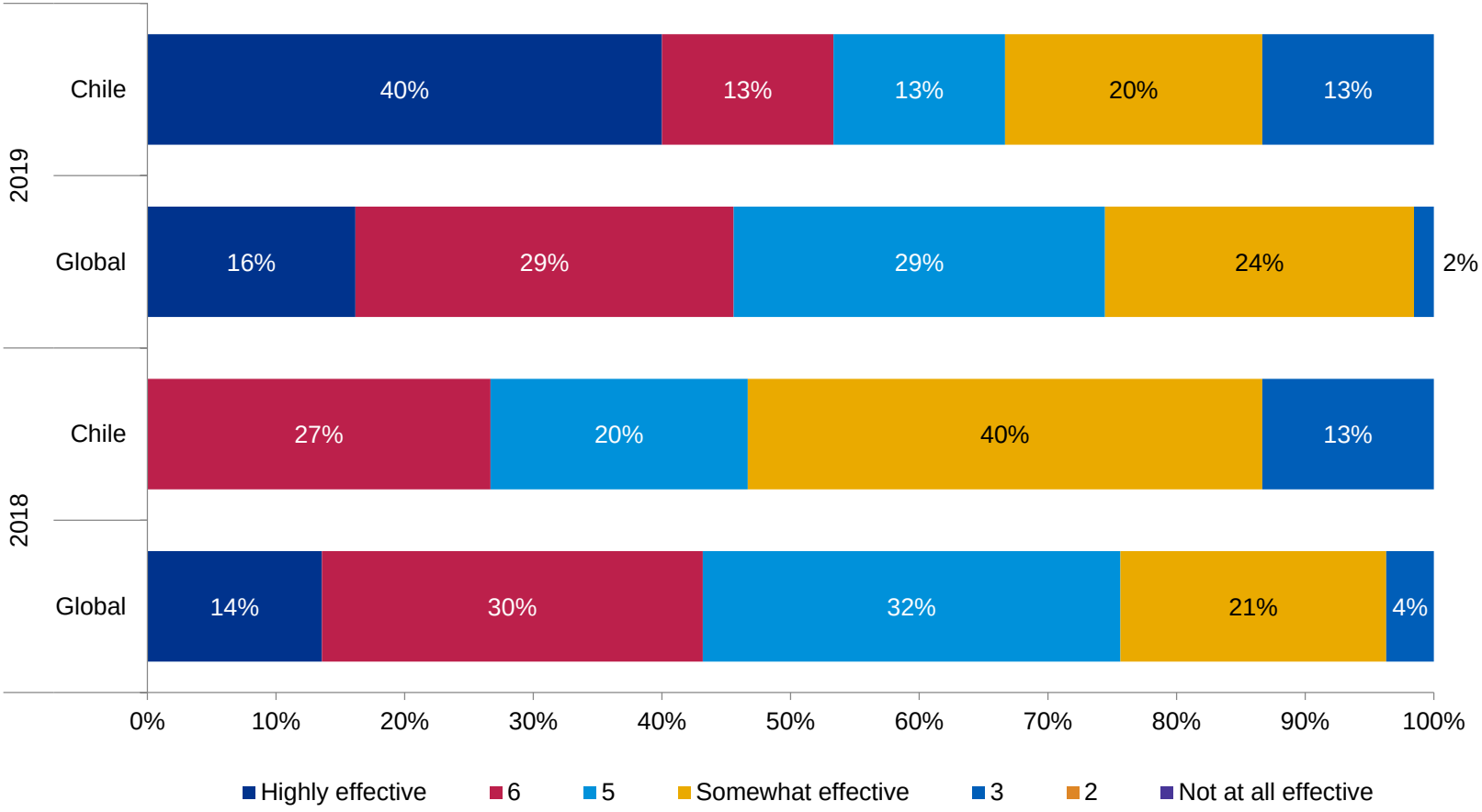
La organización resiliente

Q25. ¿Y qué tan efectiva es la fuerza laboral de su empresa en estas áreas?

E. Expertos en sostenibilidad (es decir, para liderar la integración del pensamiento sostenible en la estrategia empresarial)



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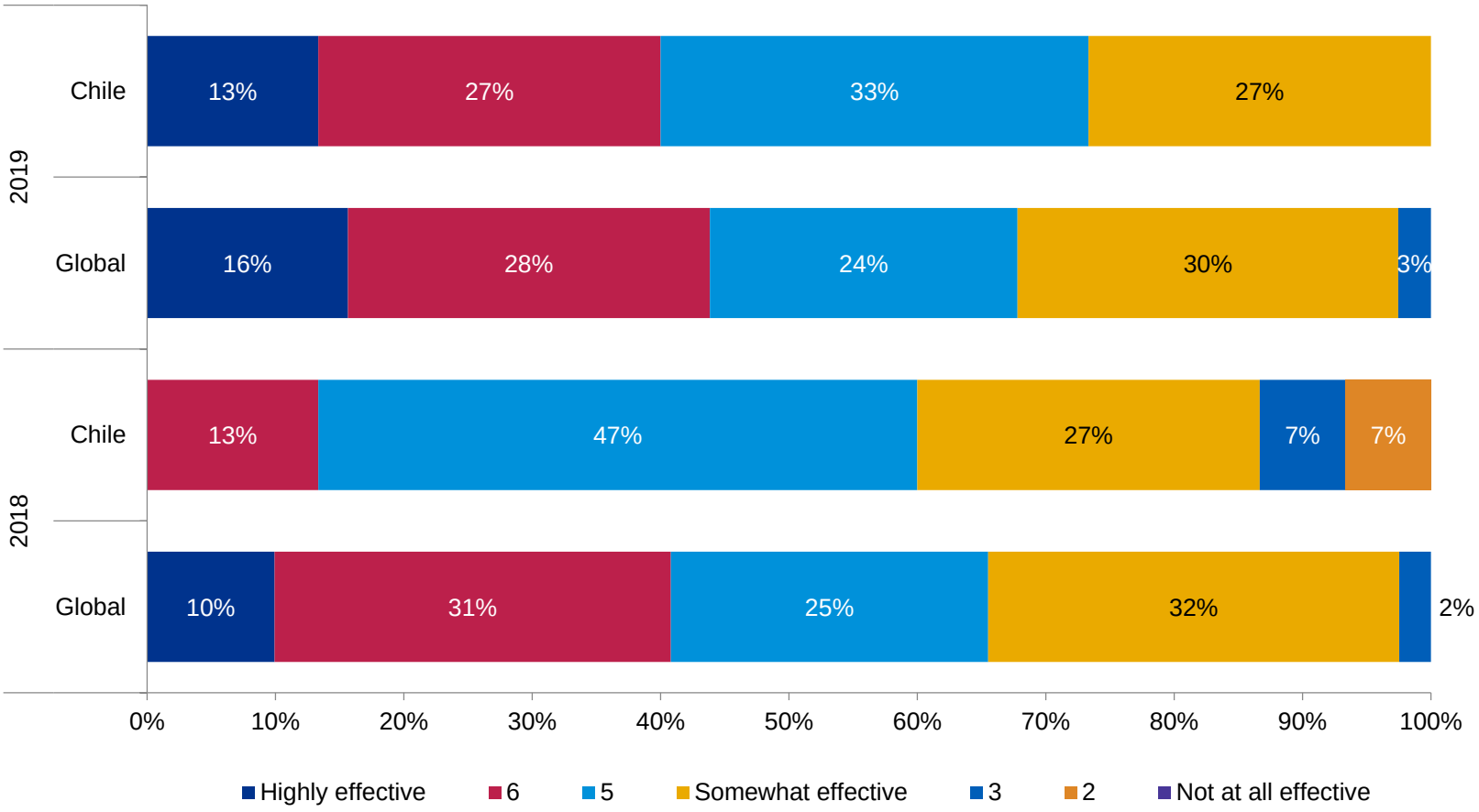
La organización resiliente

Q25. ¿Y qué tan efectiva es la fuerza laboral de su empresa en estas áreas?

F. Expertos en mercados emergentes.



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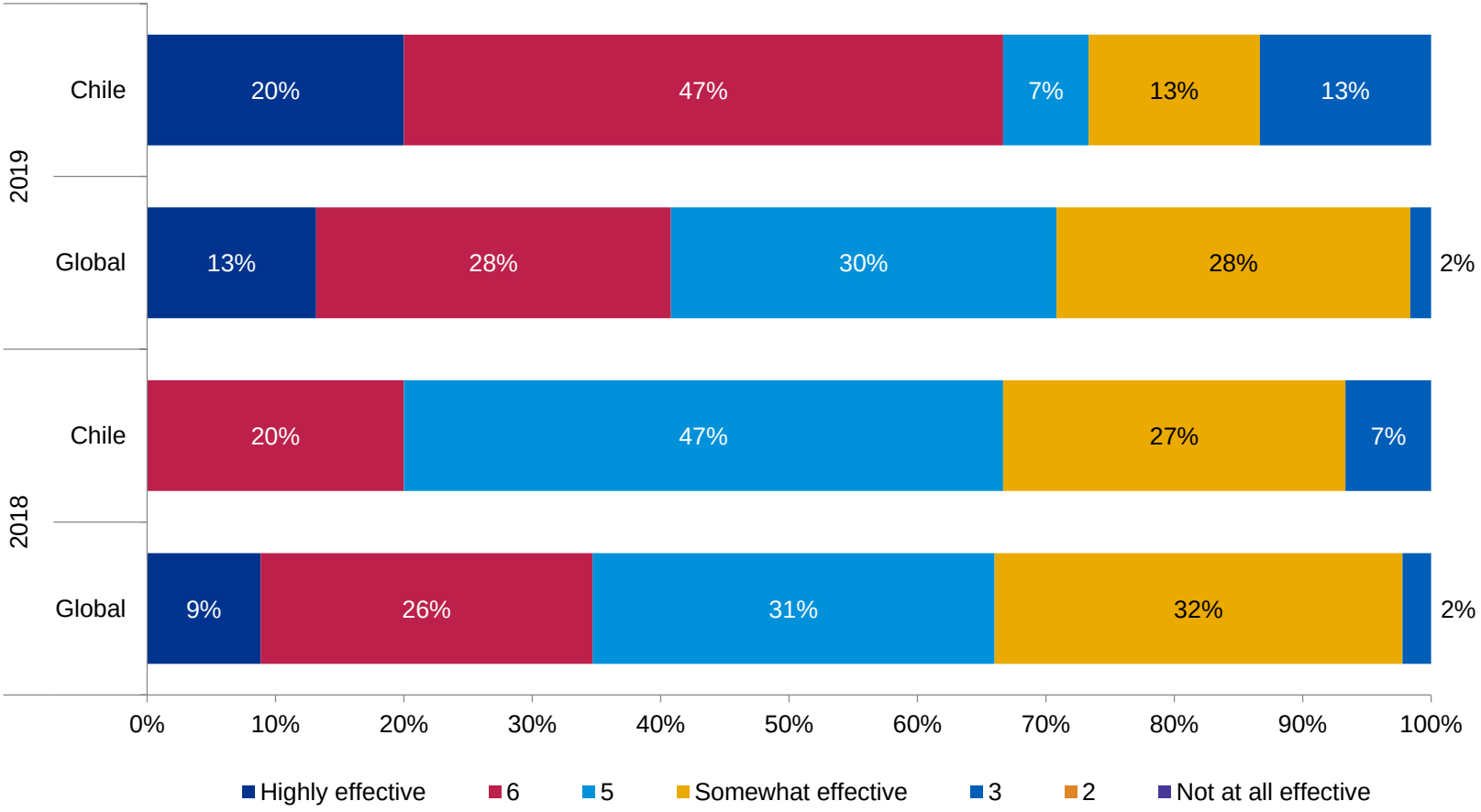
La organización resiliente

Q25. ¿Y qué tan efectiva es la fuerza laboral de su empresa en estas áreas?

G. Expertos en gobernanza / ética.



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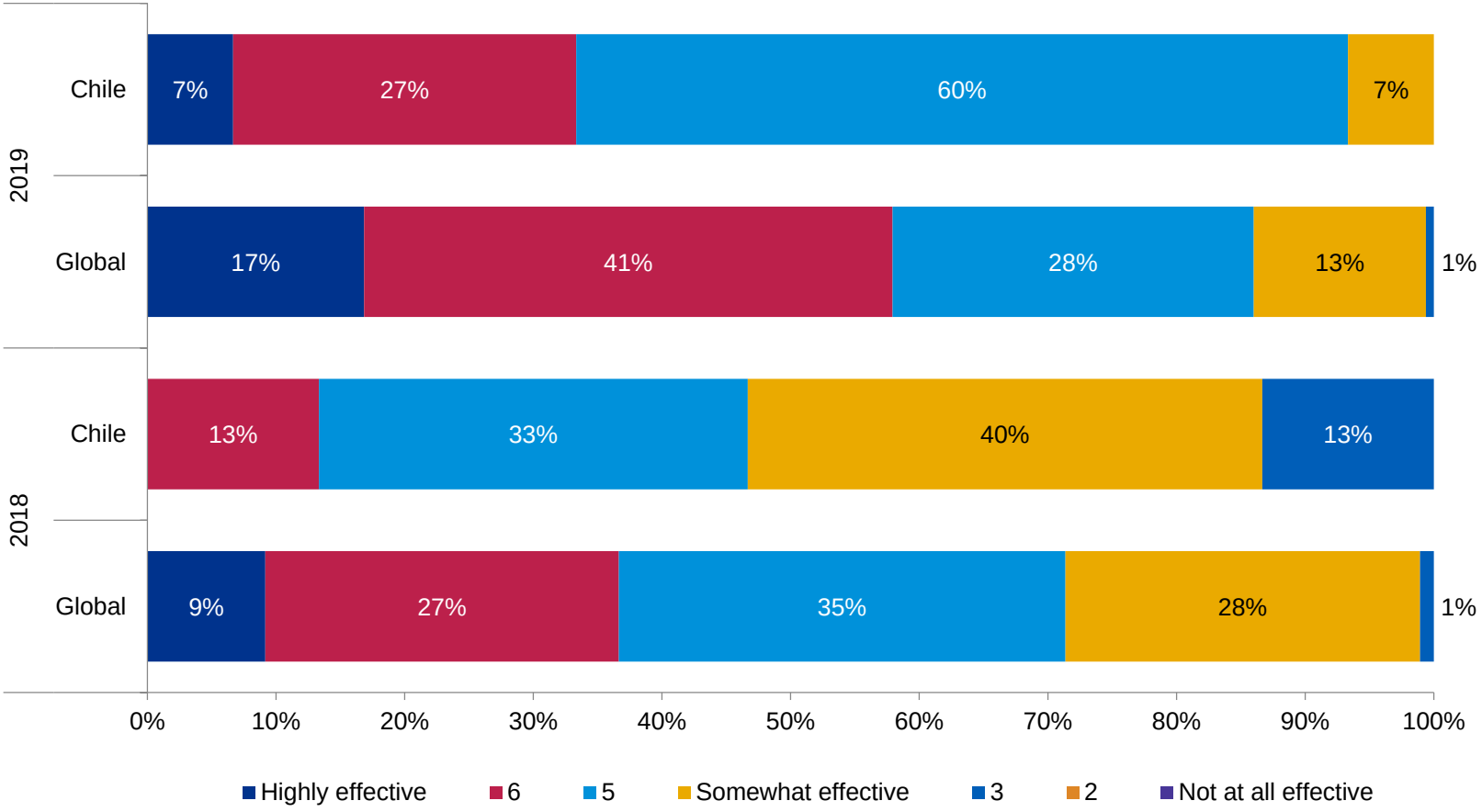
La organización resiliente

Q25. ¿Y qué tan efectiva es la fuerza laboral de su empresa en estas áreas?

H. Especialistas en modelado de escenarios y riesgos (es decir, para predecir y mitigar futuros riesgos comerciales)



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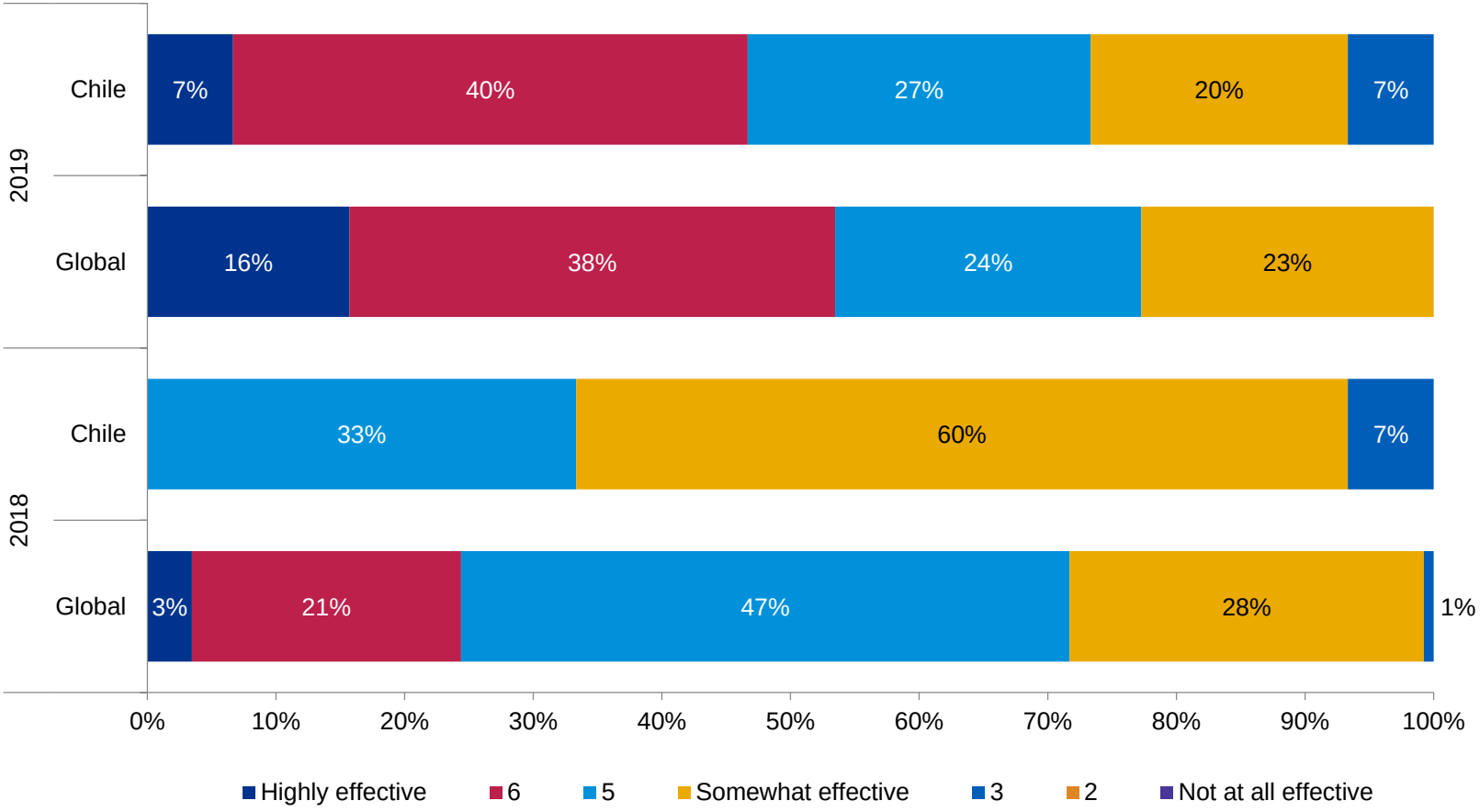
La organización resiliente

Q25. ¿Y qué tan efectiva es la fuerza laboral de su empresa en estas áreas?

I. Expertos en la fuerza laboral en evolución (es decir, aprendizaje de la fuerza laboral, gestión del talento, desarrollo de liderazgo)



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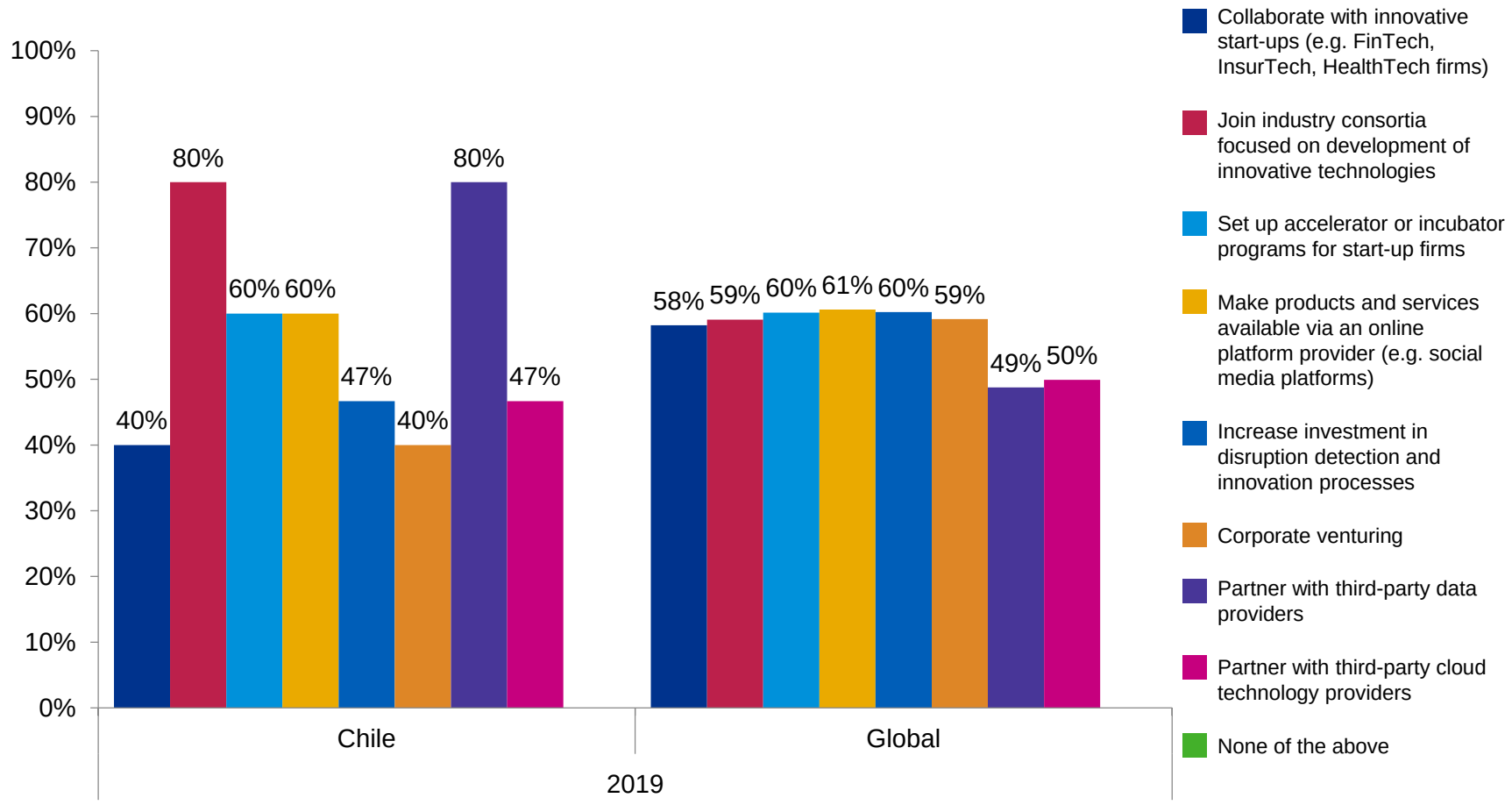
La organización resiliente

Q26. ¿Su organización pretende emprender alguna de las siguientes acciones en los próximos 3 años para ayudarlo a alcanzar sus objetivos de crecimiento?



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La organización resiliente

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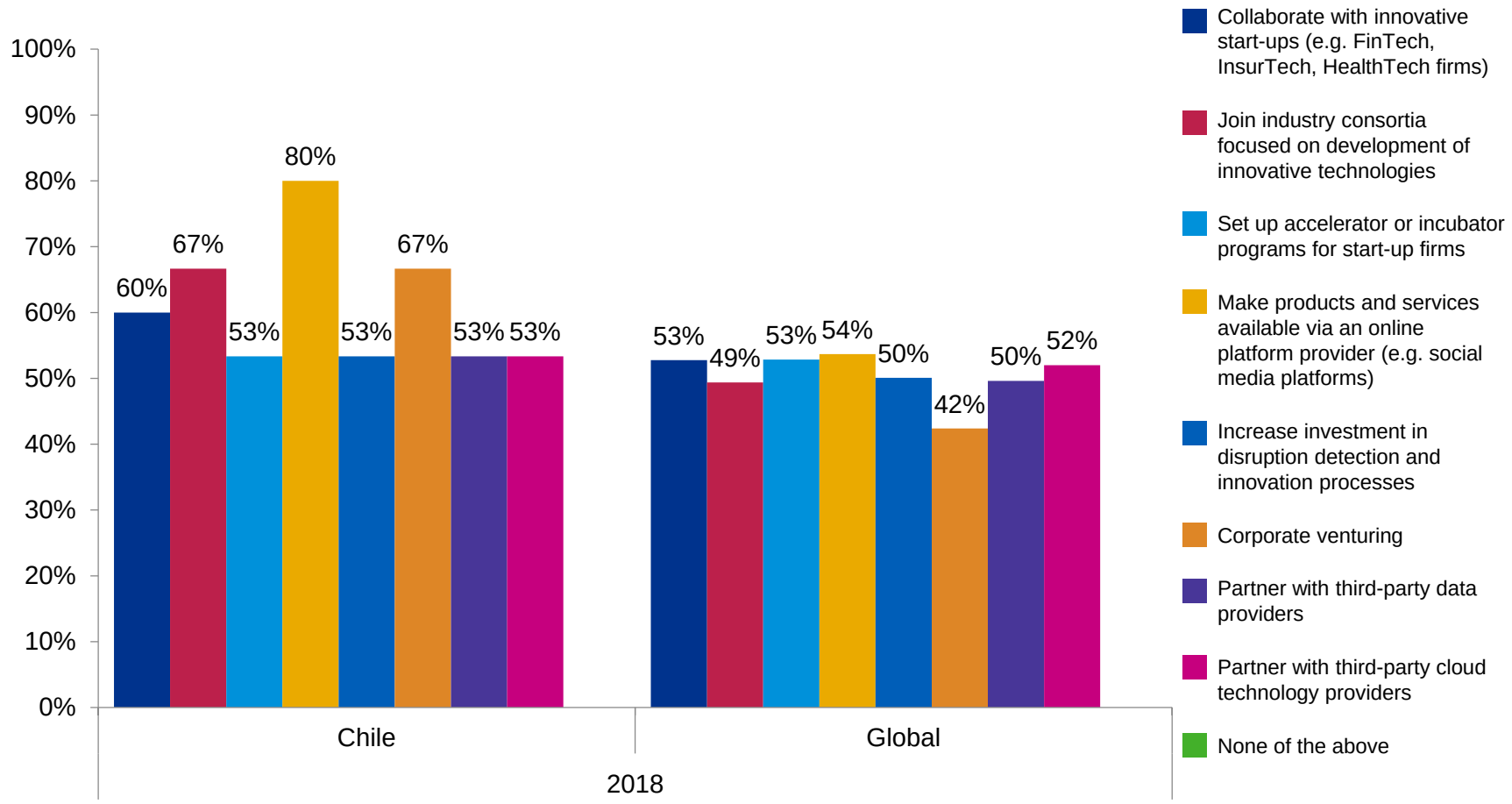

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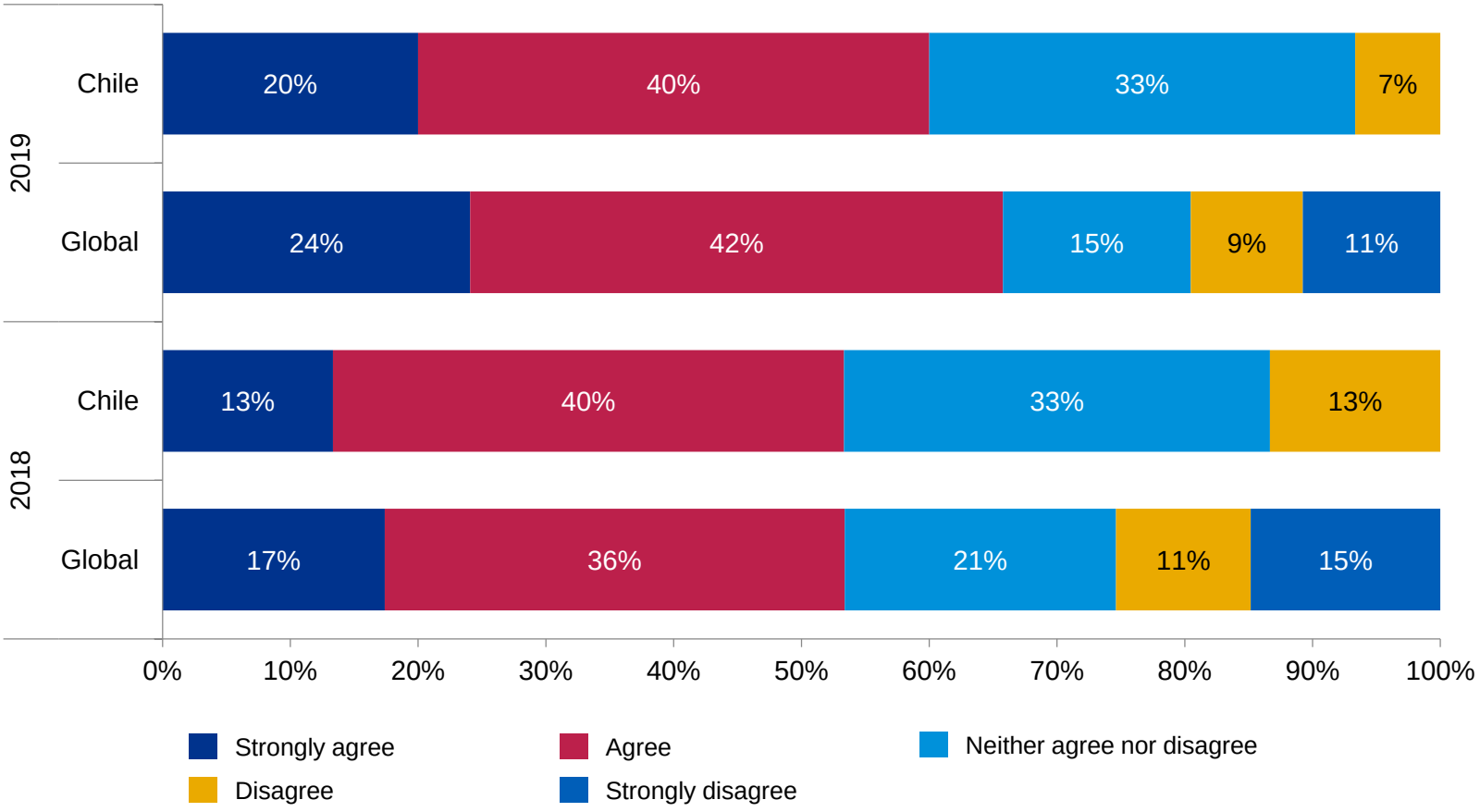
La organización resiliente

Q27. ¿En qué medida está de acuerdo con las siguientes afirmaciones sobre las experiencias de su organización de asociarse con firmas de terceros?

A. La única forma en que nuestra organización puede lograr la agilidad que necesita es aumentar el uso de asociaciones de terceros



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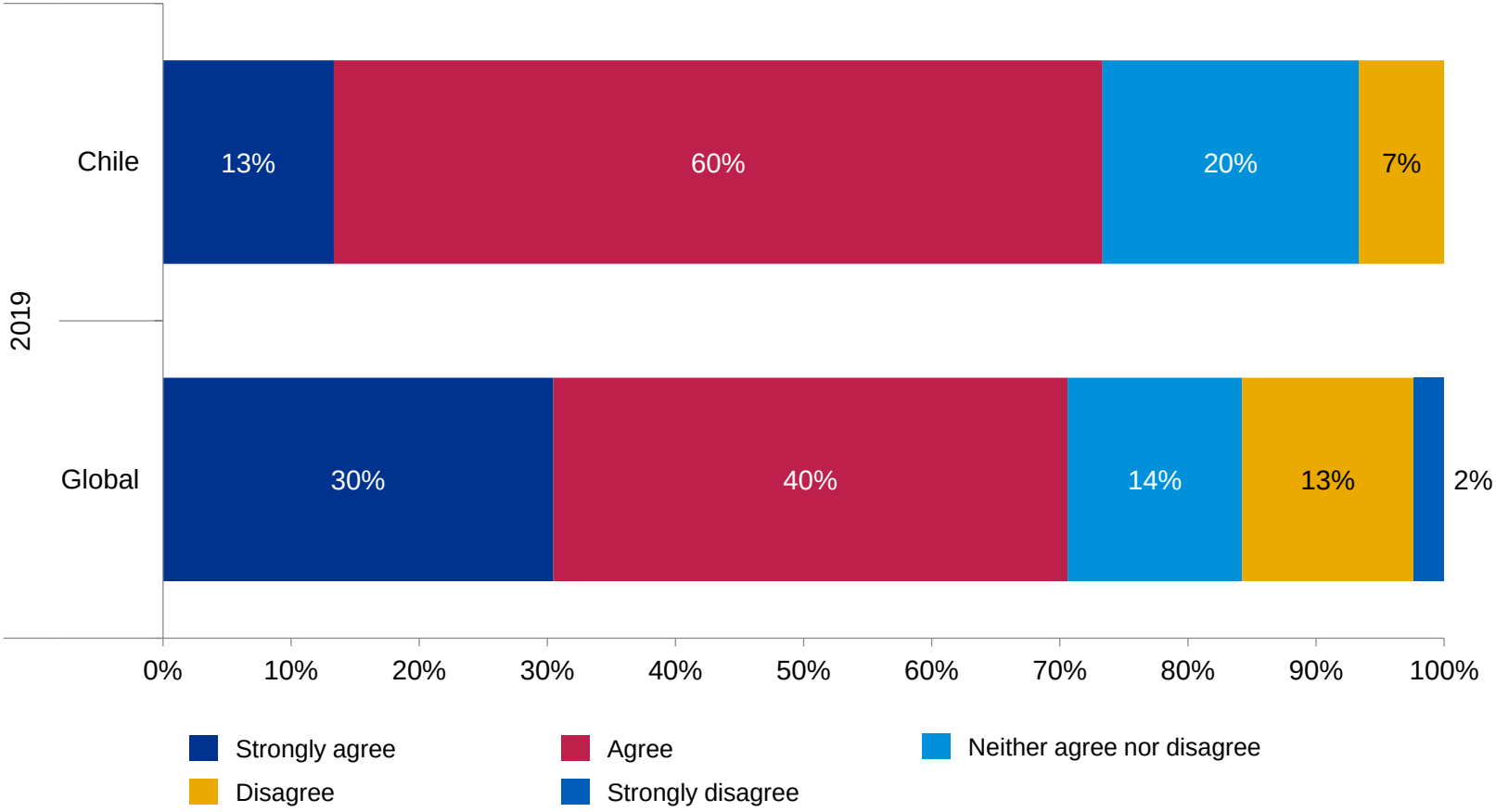
La organización resiliente

Q27. ¿En qué medida está de acuerdo con las siguientes afirmaciones sobre las experiencias de su organización de asociarse con firmas de terceros?

B. Estamos buscando calidad sobre la cantidad en nuestras nuevas asociaciones (como tener menos relaciones más profundas)



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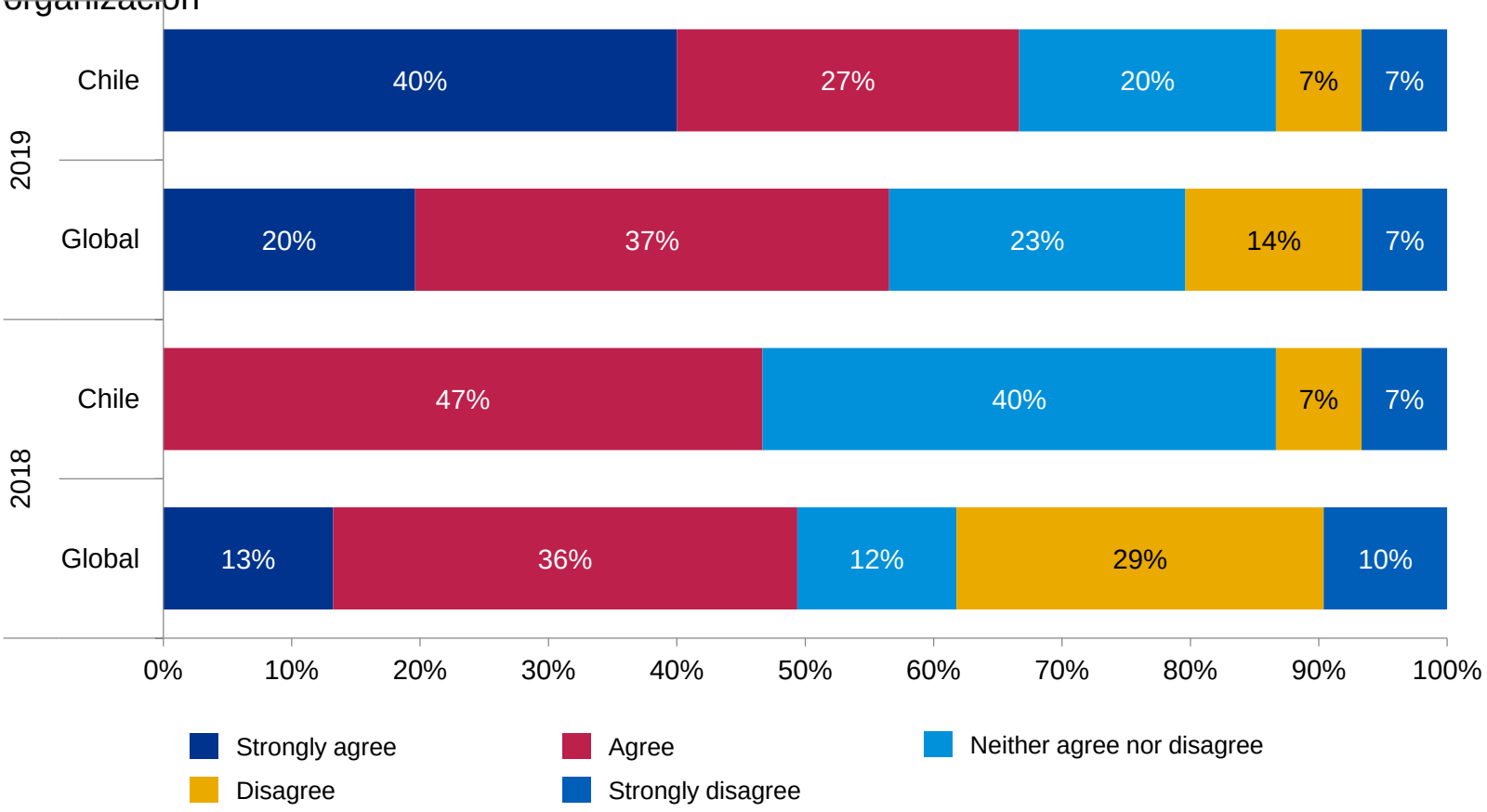
La organización resiliente

Q27. ¿En qué medida está de acuerdo con las siguientes afirmaciones sobre las experiencias de su organización de asociarse con firmas de terceros?

C. En el pasado, hemos reconsiderado una asociación de terceros que habría ayudado con el crecimiento porque el tercero no encajaba bien con la cultura y el propósito de nuestra organización



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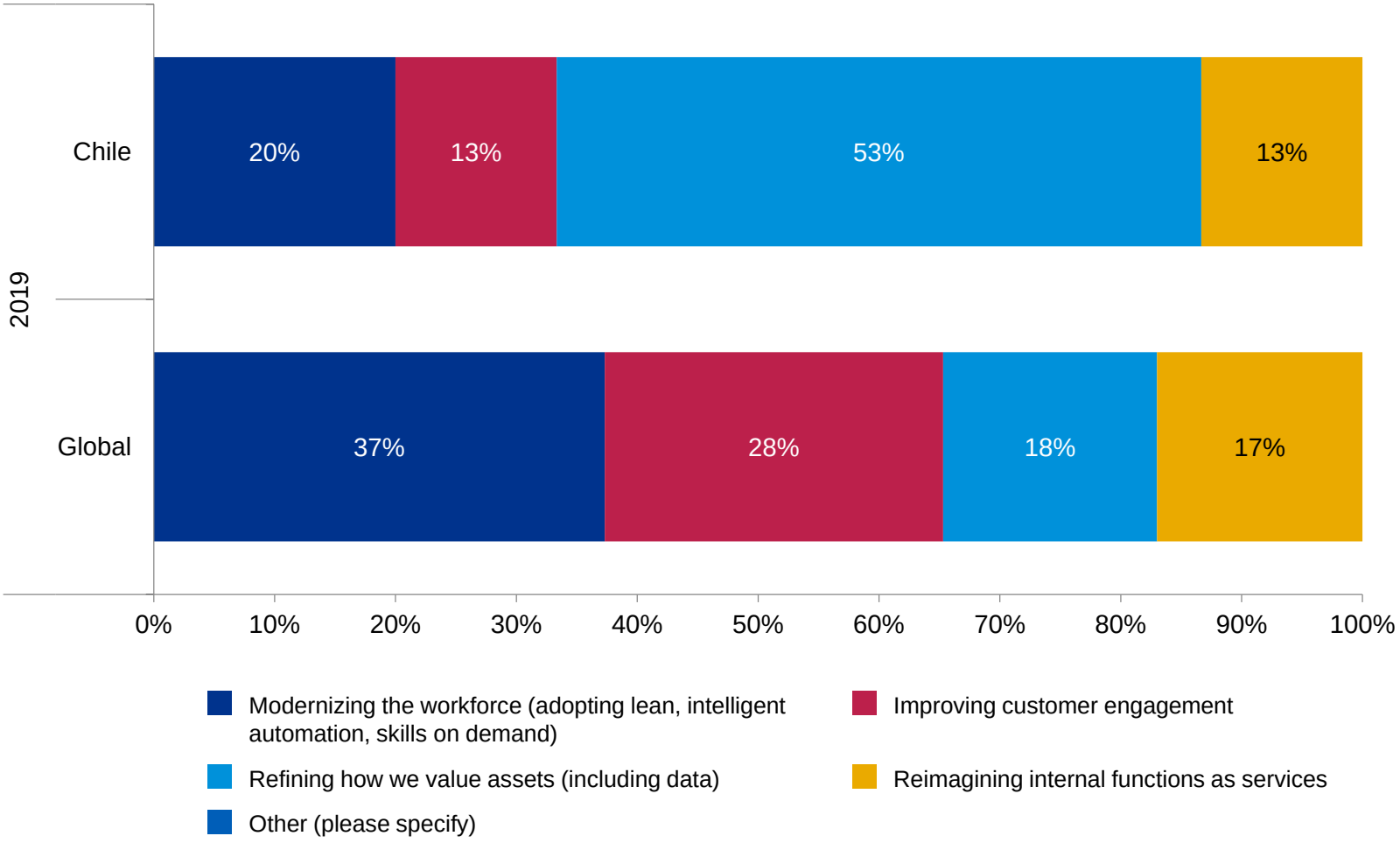
La organización resiliente

Q28. ¿En qué estrategia confía más para garantizar que su organización esté preparada para el futuro?



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La organización resiliente

Q29. Pensando específicamente en mejorar la capacidad de recuperación de su organización, ¿a cuál de las siguientes inversiones está priorizando?

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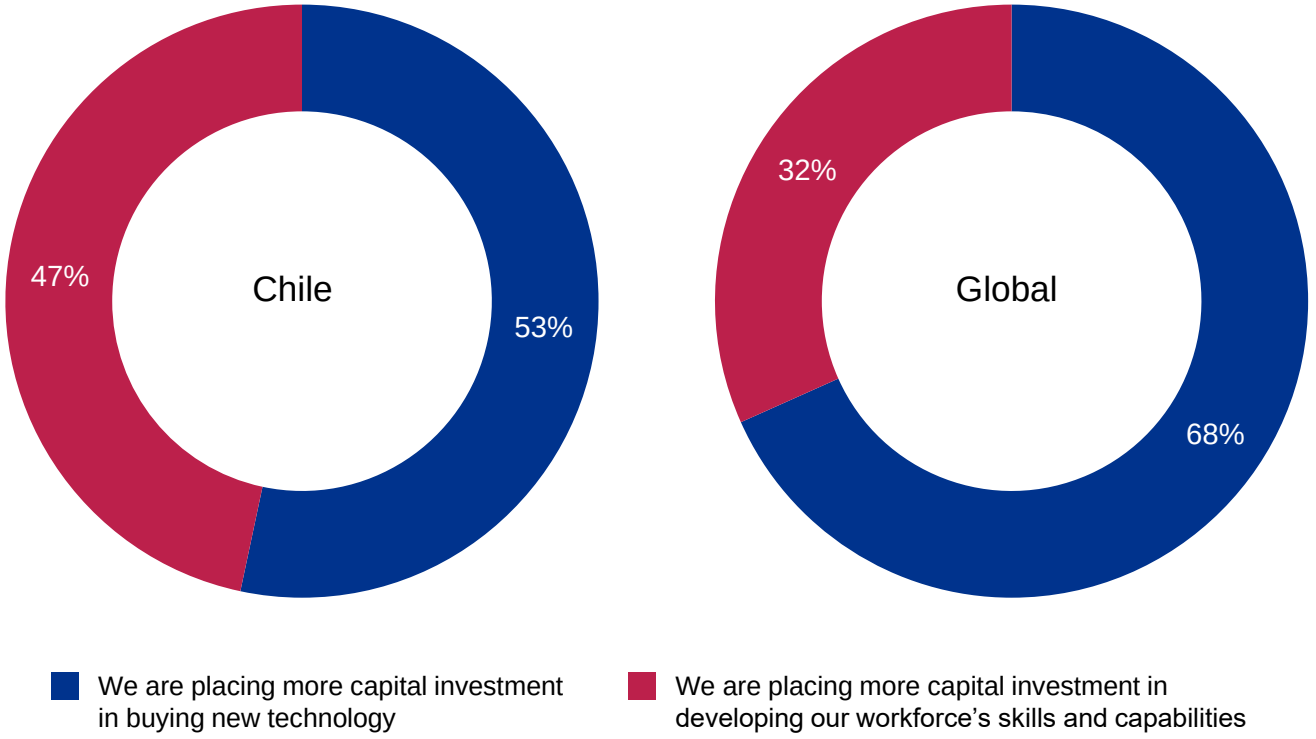

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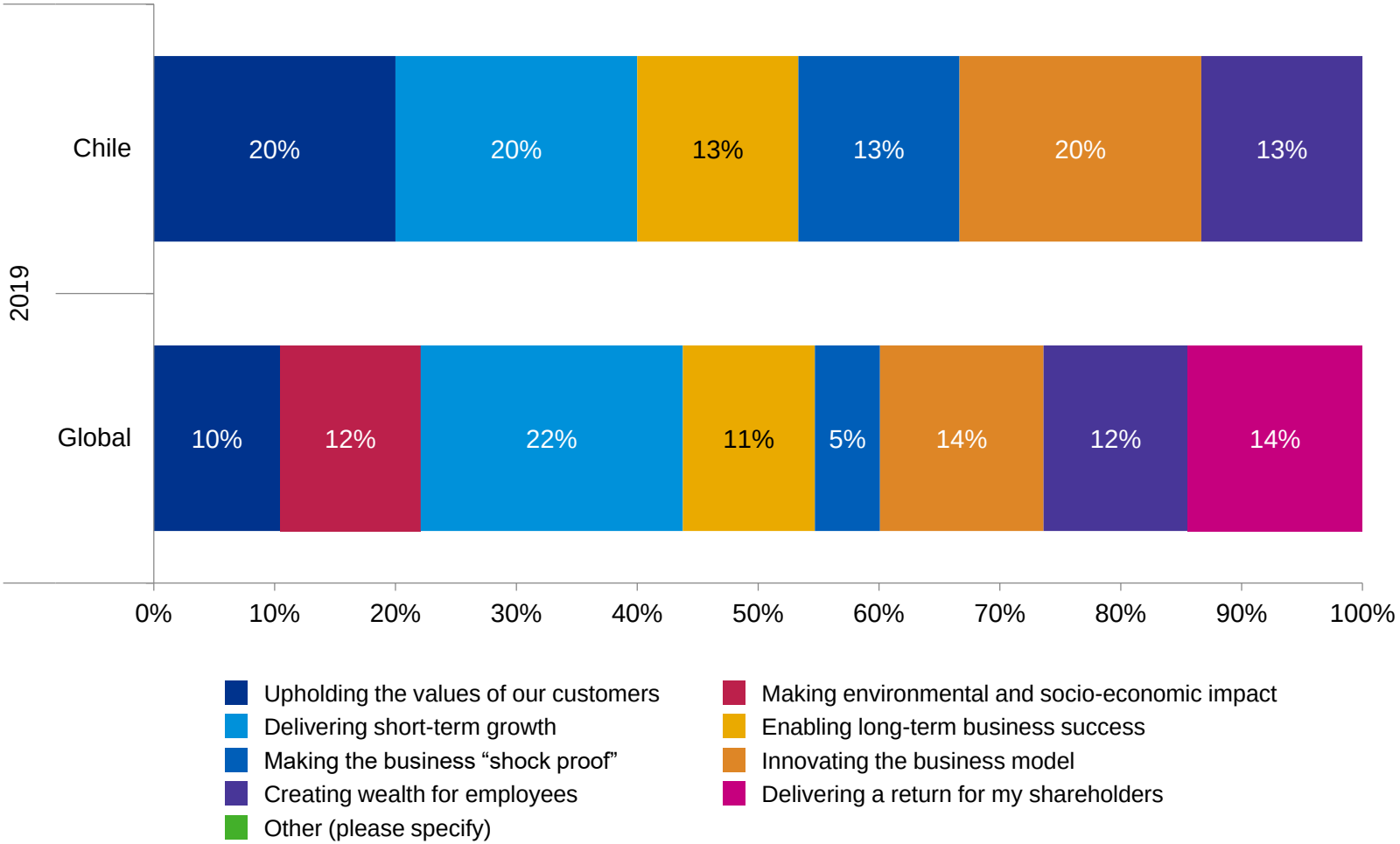
KPMG

El cambio de rol del CEO y la tenencia

El cambio de rol del CEO y la tenencia

Q30. Como CEO, ¿qué te motiva más?



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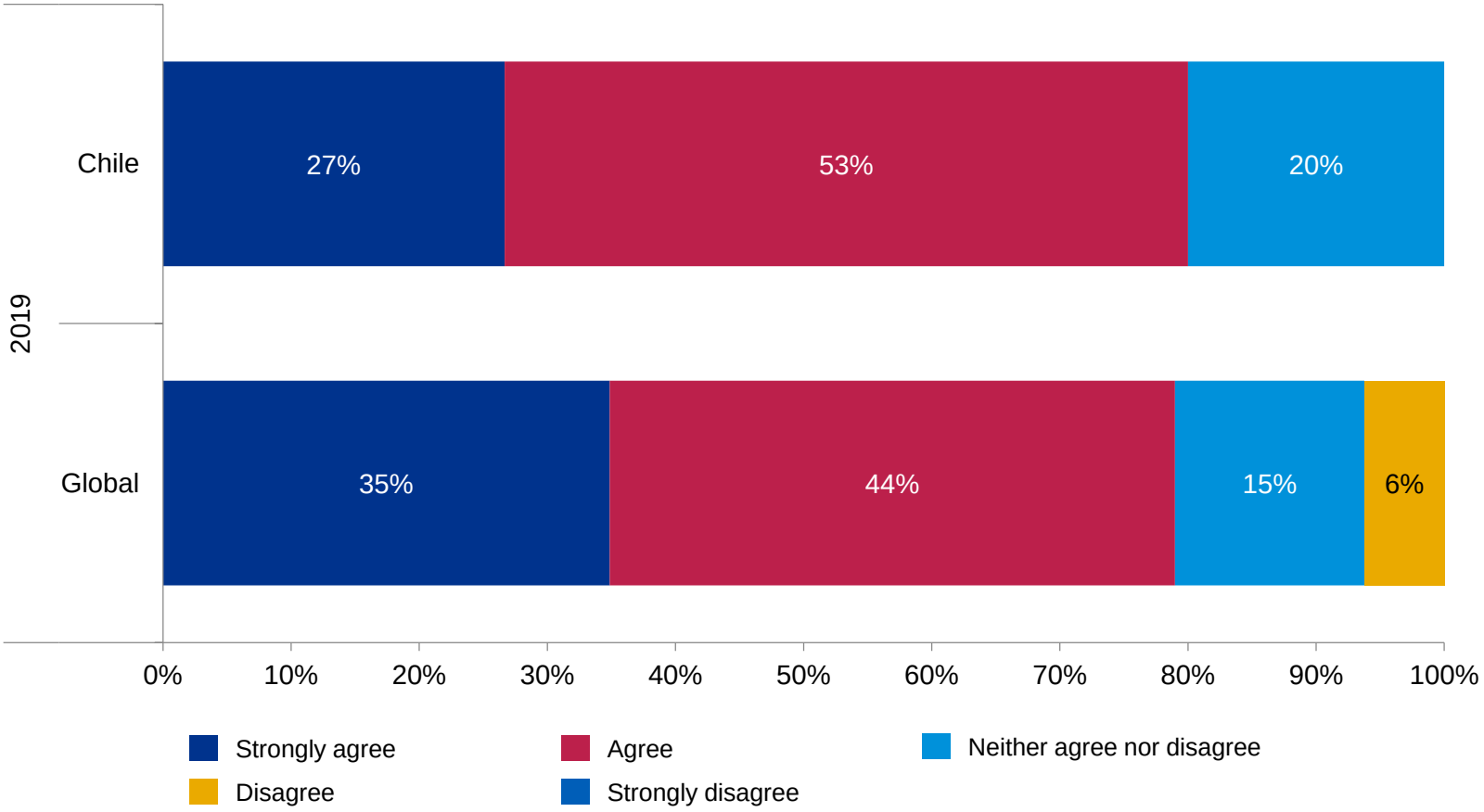
El cambio de rol del CEO y la tenencia

Q31. ¿En qué medida está de acuerdo o en desacuerdo con las siguientes afirmaciones sobre su función como CEO?

A. Estoy implementando medidas para garantizar que mi visión personal se realice después de haber dejado mi rol actual



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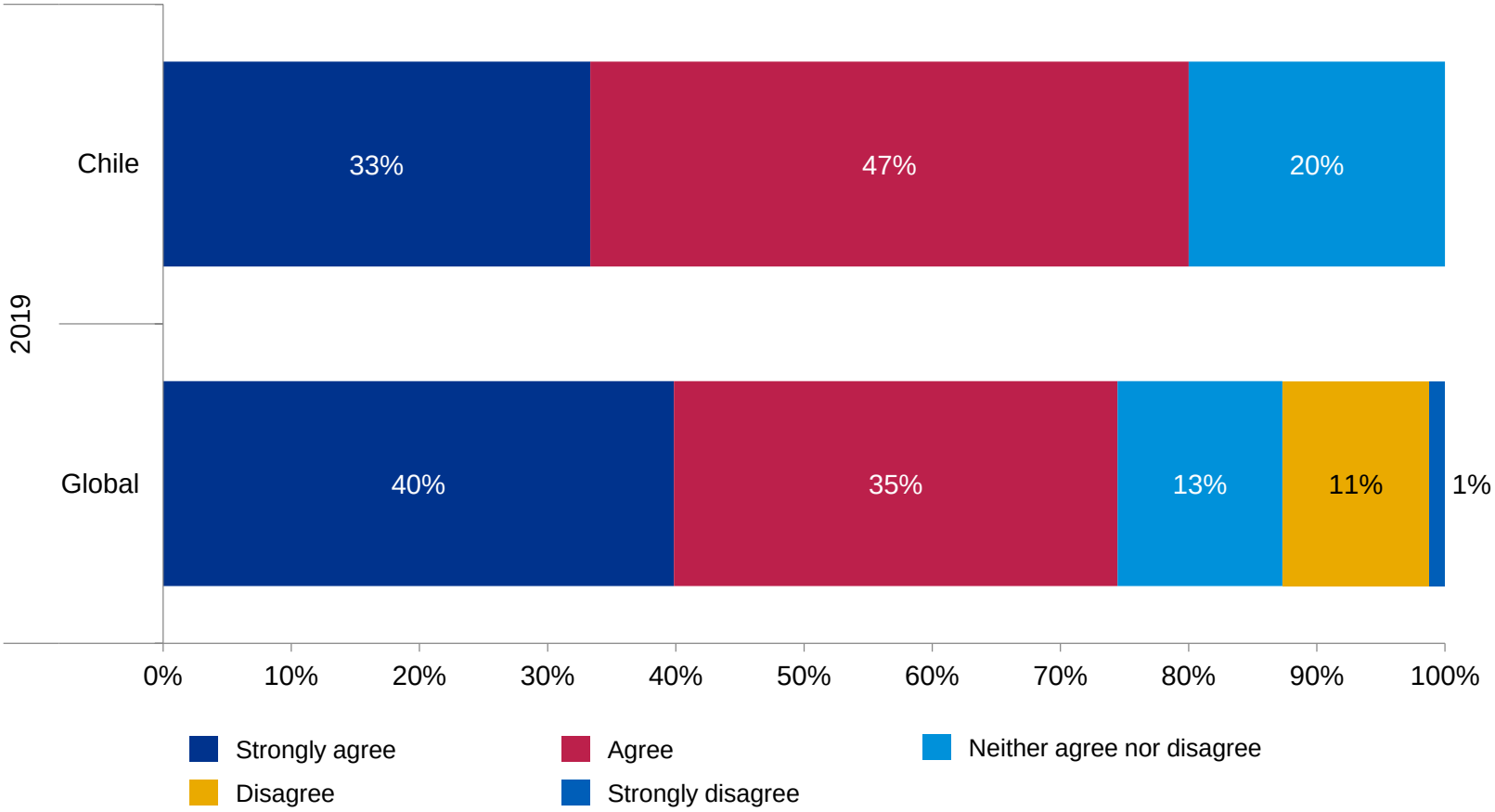
El cambio de rol del CEO y la tenencia

Q31. ¿En qué medida está de acuerdo o en desacuerdo con las siguientes afirmaciones sobre su función como CEO?

B. La duración promedio de un CEO hoy es de alrededor de 5 años, que es más corto de lo que era al comienzo de mi carrera



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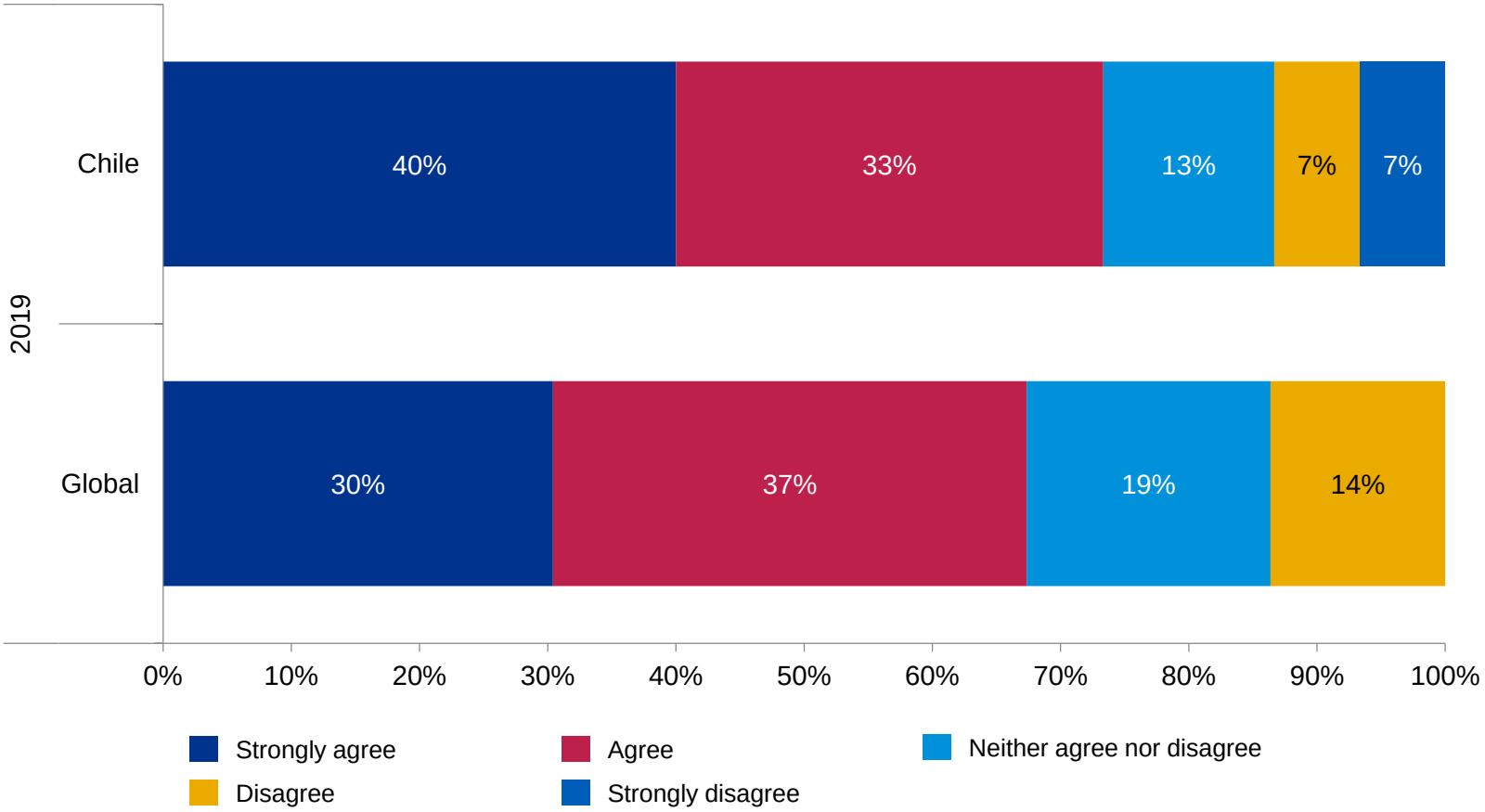
El cambio de rol del CEO y la tenencia

Q31. ¿En qué medida está de acuerdo o en desacuerdo con las siguientes afirmaciones sobre su función como CEO?

C. A los 5 años, el mandato promedio de un CEO aumenta la necesidad de actuar con agilidad



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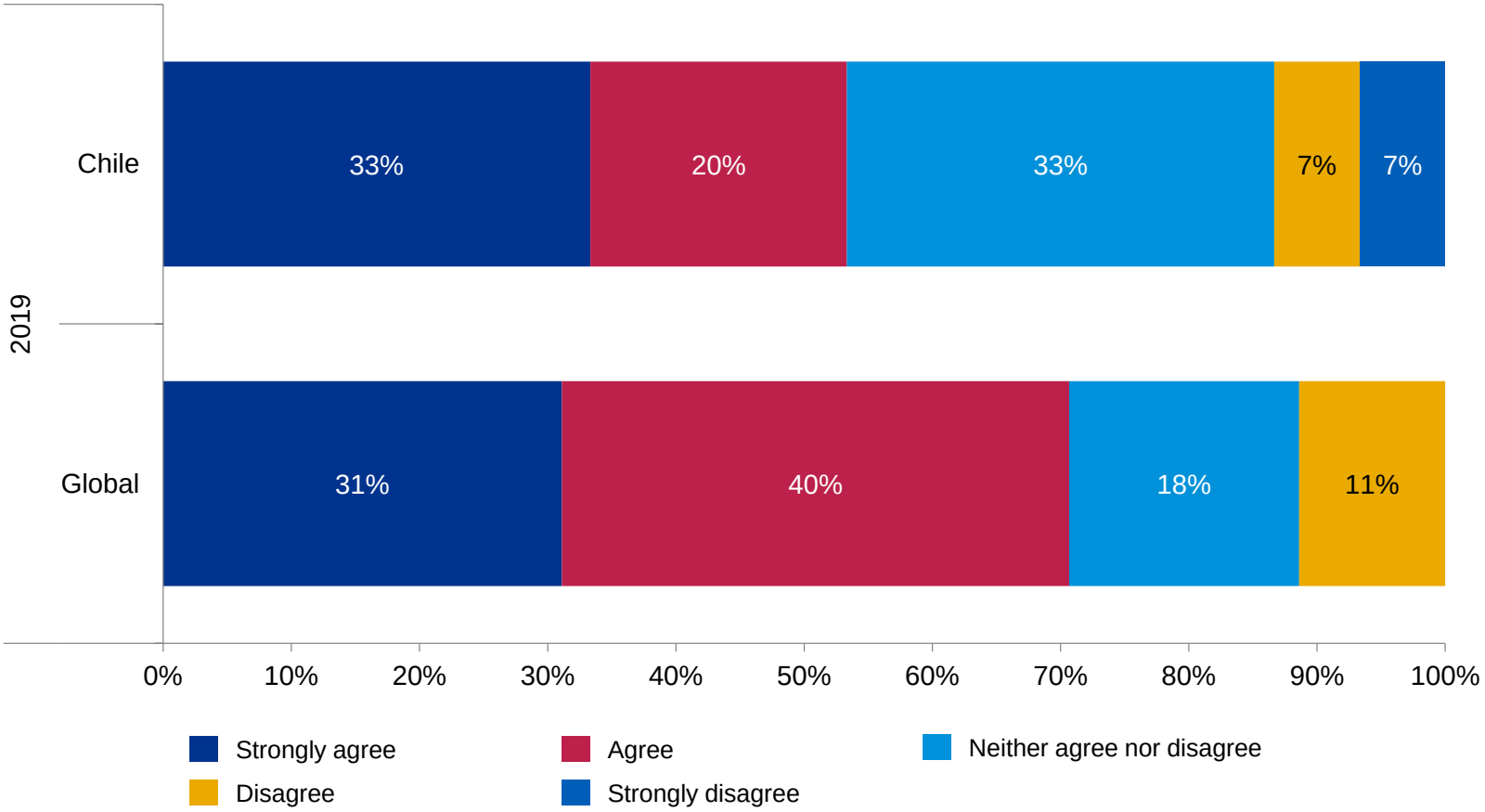
El cambio de rol del CEO y la tenencia

Q31. ¿En qué medida está de acuerdo o en desacuerdo con las siguientes afirmaciones sobre su función como CEO?

D. Se necesitan diferentes tipos de CEO para diferentes etapas del ciclo de vida de una empresa (por ejemplo, crecimiento, reestructuración, transformación, etc.)



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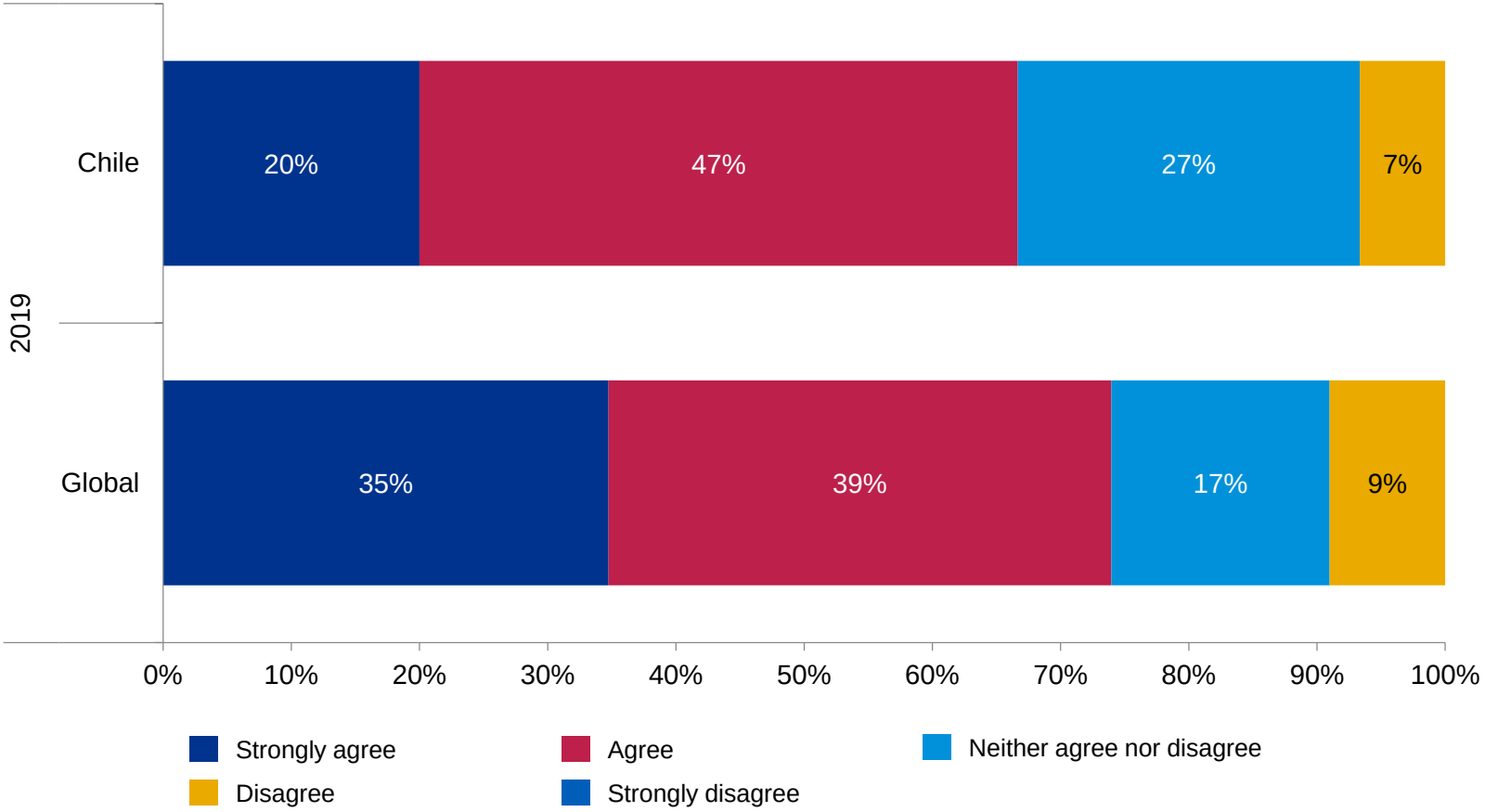
El cambio de rol del CEO y la tenencia

Q31. ¿En qué medida está de acuerdo o en desacuerdo con las siguientes afirmaciones sobre su función como CEO?

E. Tuve un paso en falso significativo al principio de mi carrera (como asumir un rol o lanzar una empresa que finalmente fue infructuosa) que pude superar



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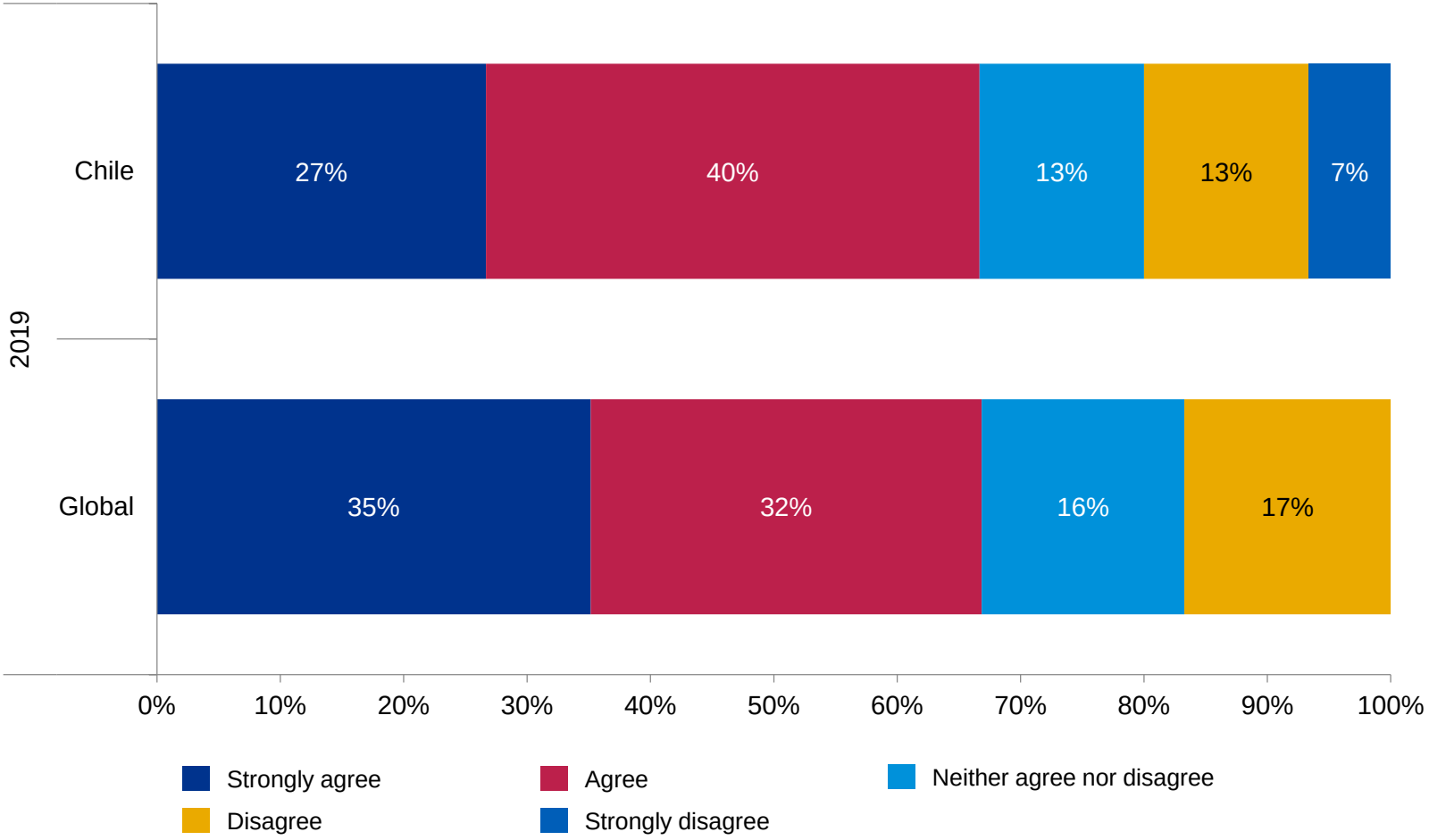
El cambio de rol del CEO y la tenencia

Q32. ¿En qué medida está de acuerdo con las siguientes afirmaciones sobre sus clientes?

A. Podríamos mejorar significativamente nuestra comprensión de nuestros clientes



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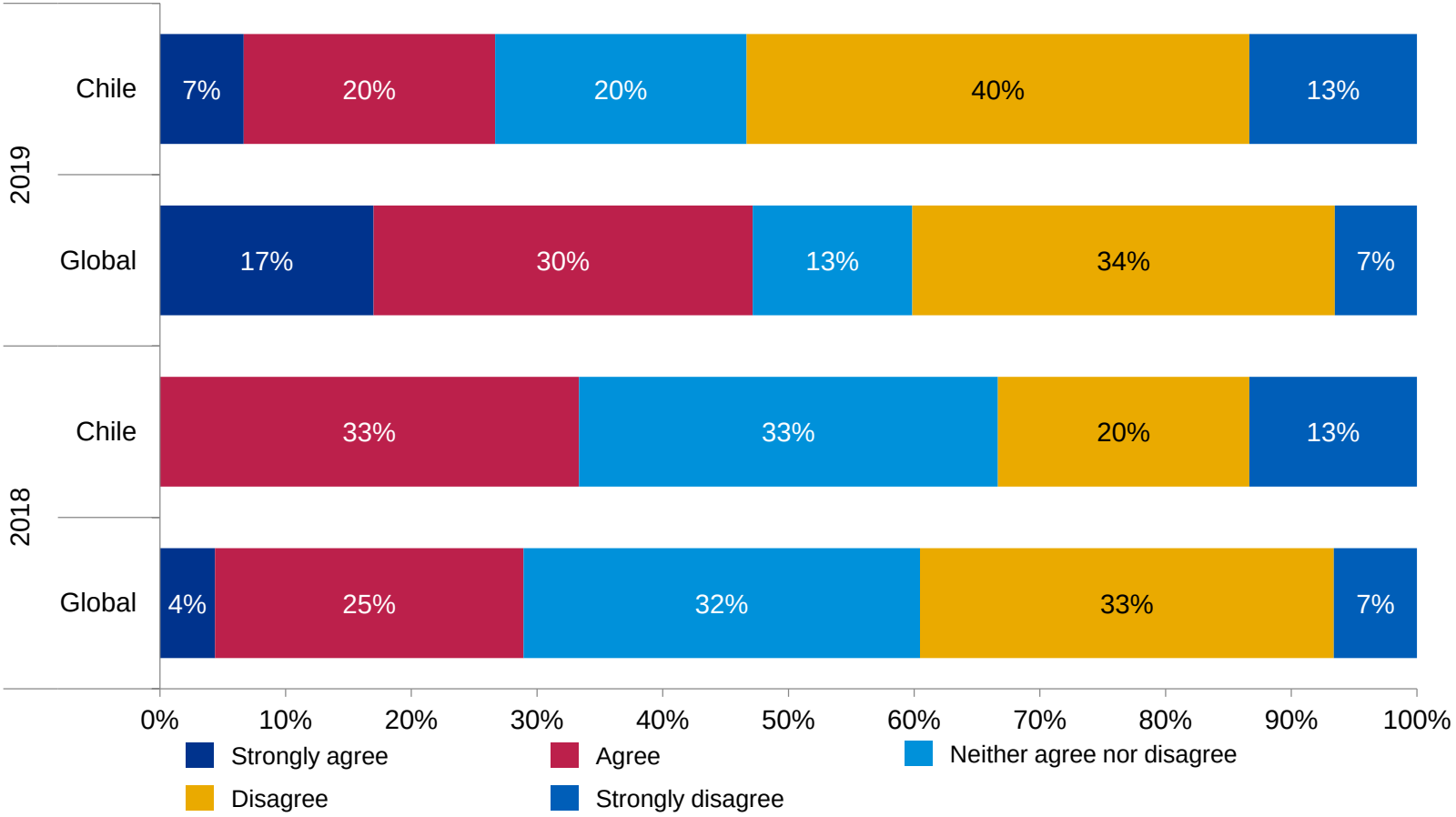
El cambio de rol del CEO y la tenencia

Q32. ¿En qué medida está de acuerdo con las siguientes afirmaciones sobre sus clientes?

B. Hasta la fecha, las inversiones que hemos hecho al tratar de personalizar la experiencia del cliente no han brindado los beneficios de crecimiento que esperamos



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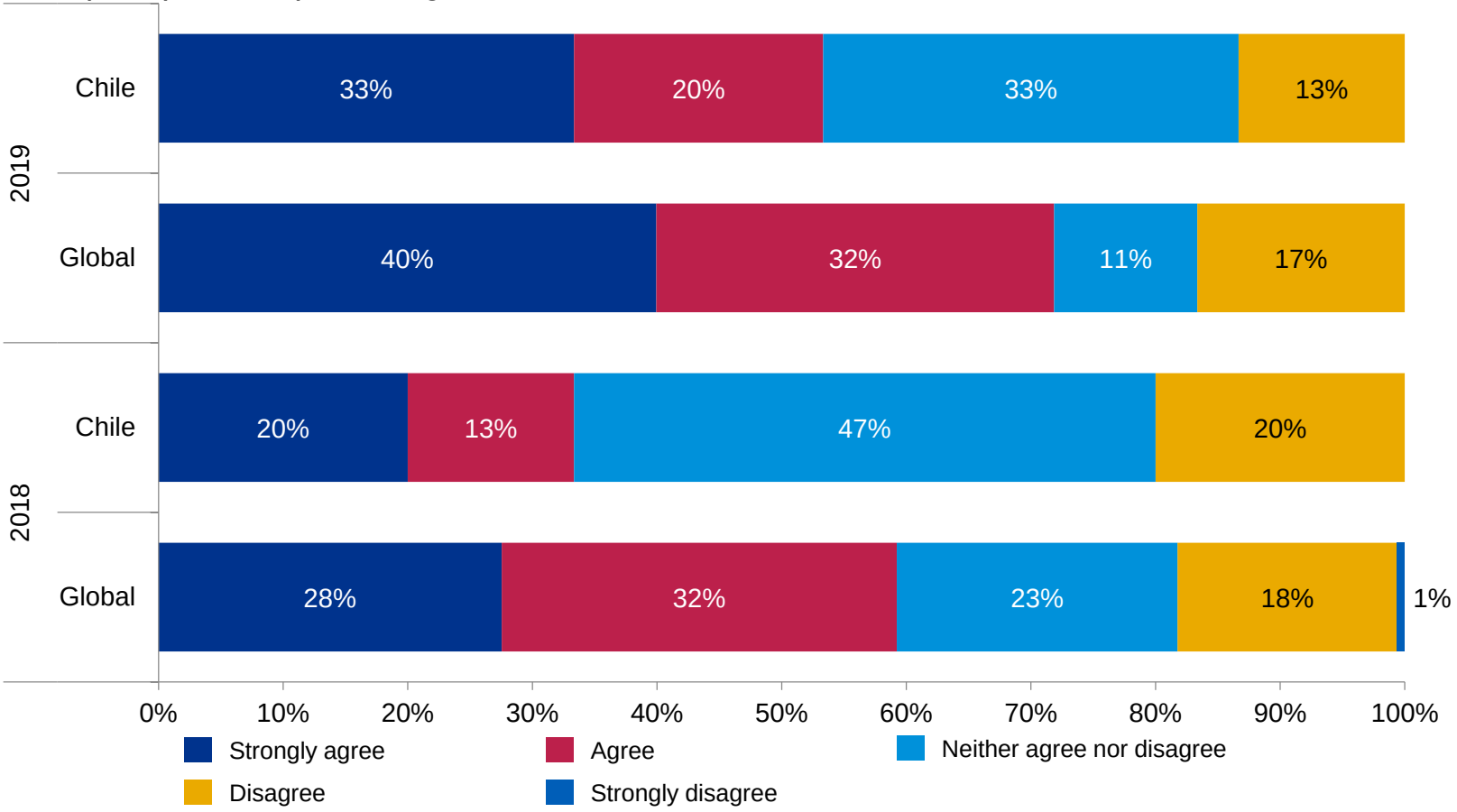
El cambio de rol del CEO y la tenencia

Q32. ¿En qué medida está de acuerdo con las siguientes afirmaciones sobre sus clientes?

C. Proteger los datos de los clientes es una de mis responsabilidades más importantes como CEO para permitir que mi organización aumente su base de clientes en el futuro



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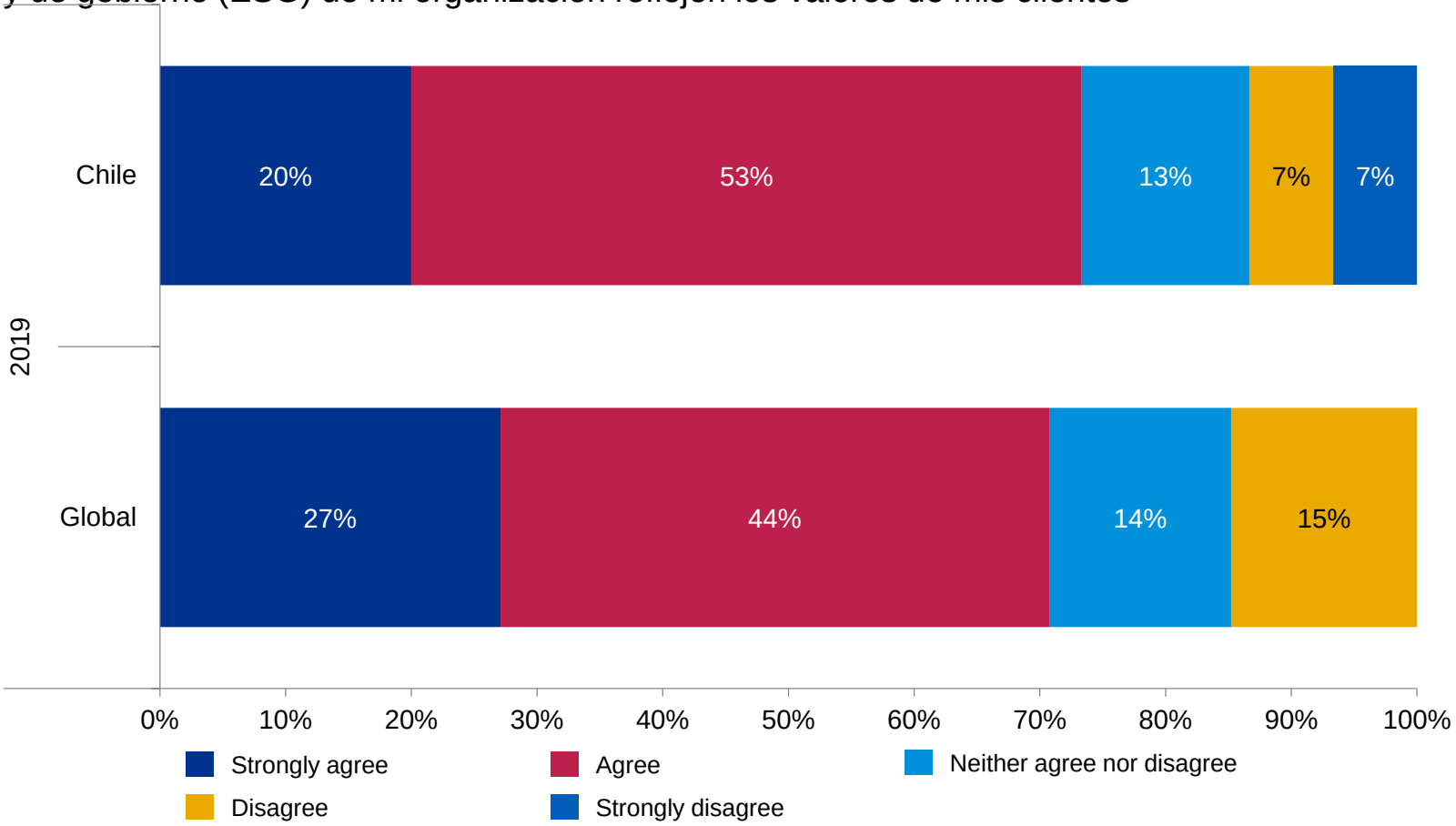
El cambio de rol del CEO y la tenencia

Q32. ¿En qué medida está de acuerdo con las siguientes afirmaciones sobre sus clientes?

D. Creo que es mi responsabilidad personal garantizar que las políticas ambientales, sociales y de gobierno (ESG) de mi organización reflejen los valores de mis clientes



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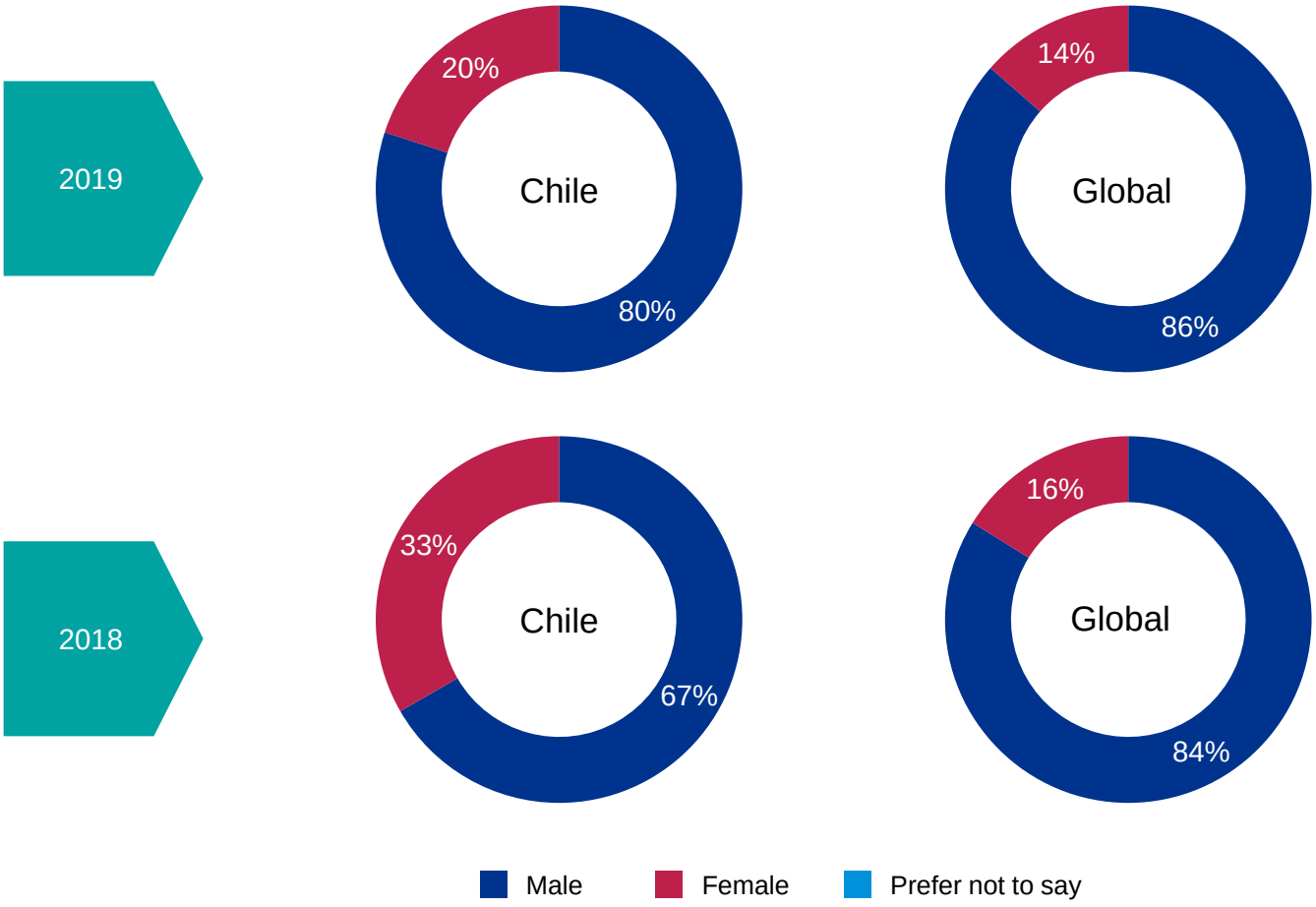
KPMG

Demografía

Demografía

D1. ¿Cuál es su género?



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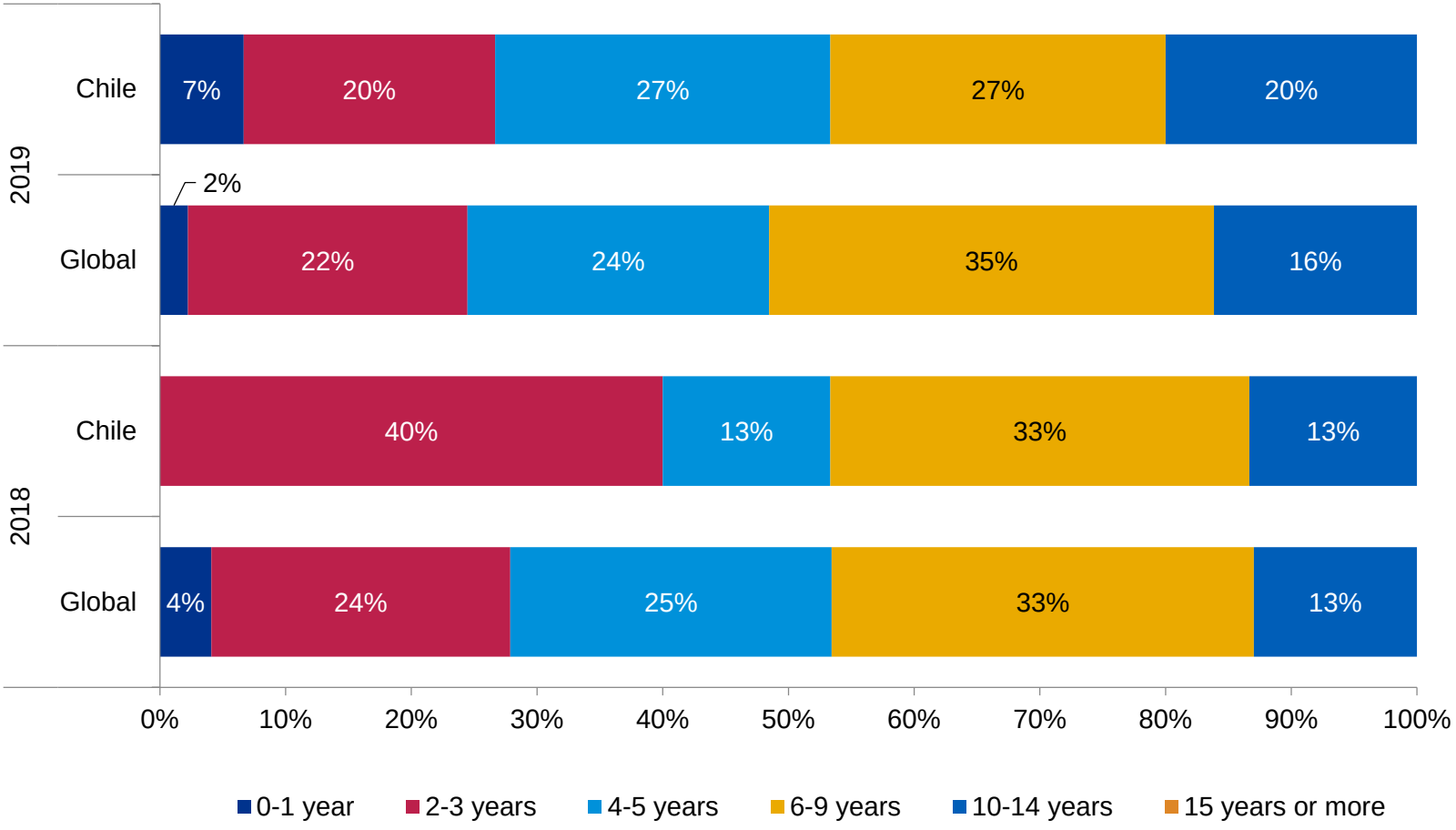
Demografía

D2. Finalmente, ¿cuánto tiempo ha sido el CEO de su organización actual?

Número de años



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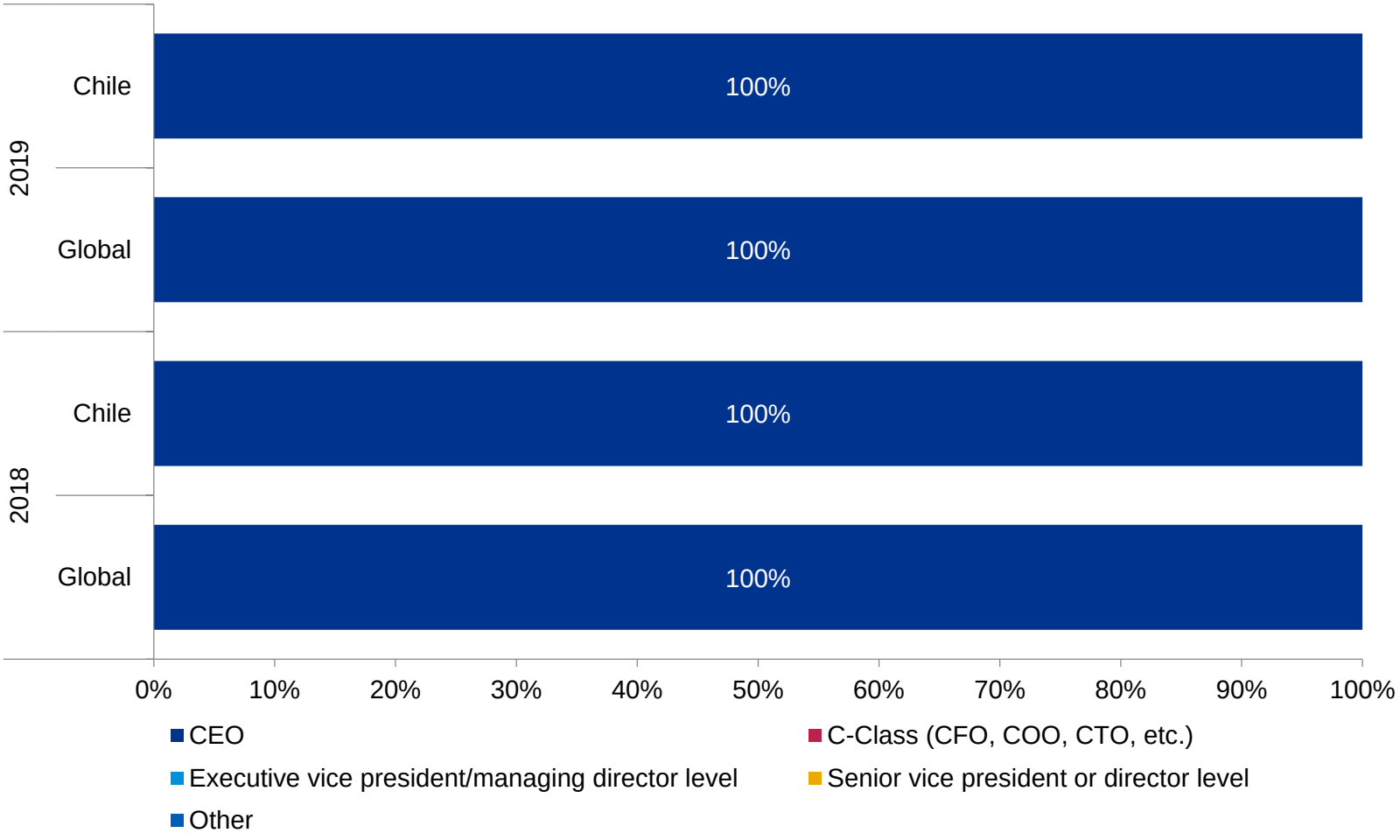
KPMG

Contexto

Contexto

C1. ¿Cuál es tu título?



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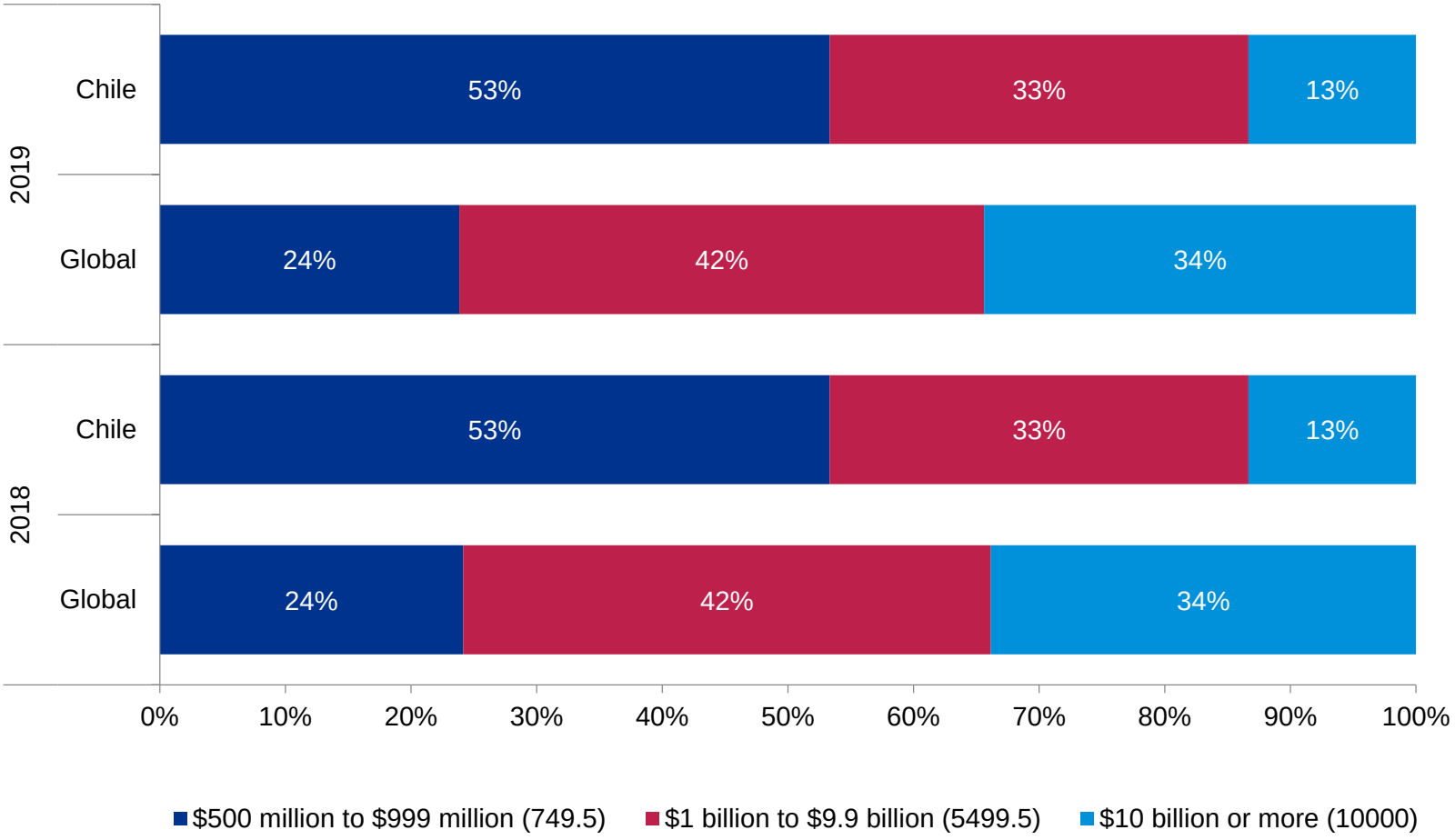
Contexto

C2. ¿Cuáles fueron los ingresos de su organización (en dólares estadounidenses) en su año fiscal más reciente?



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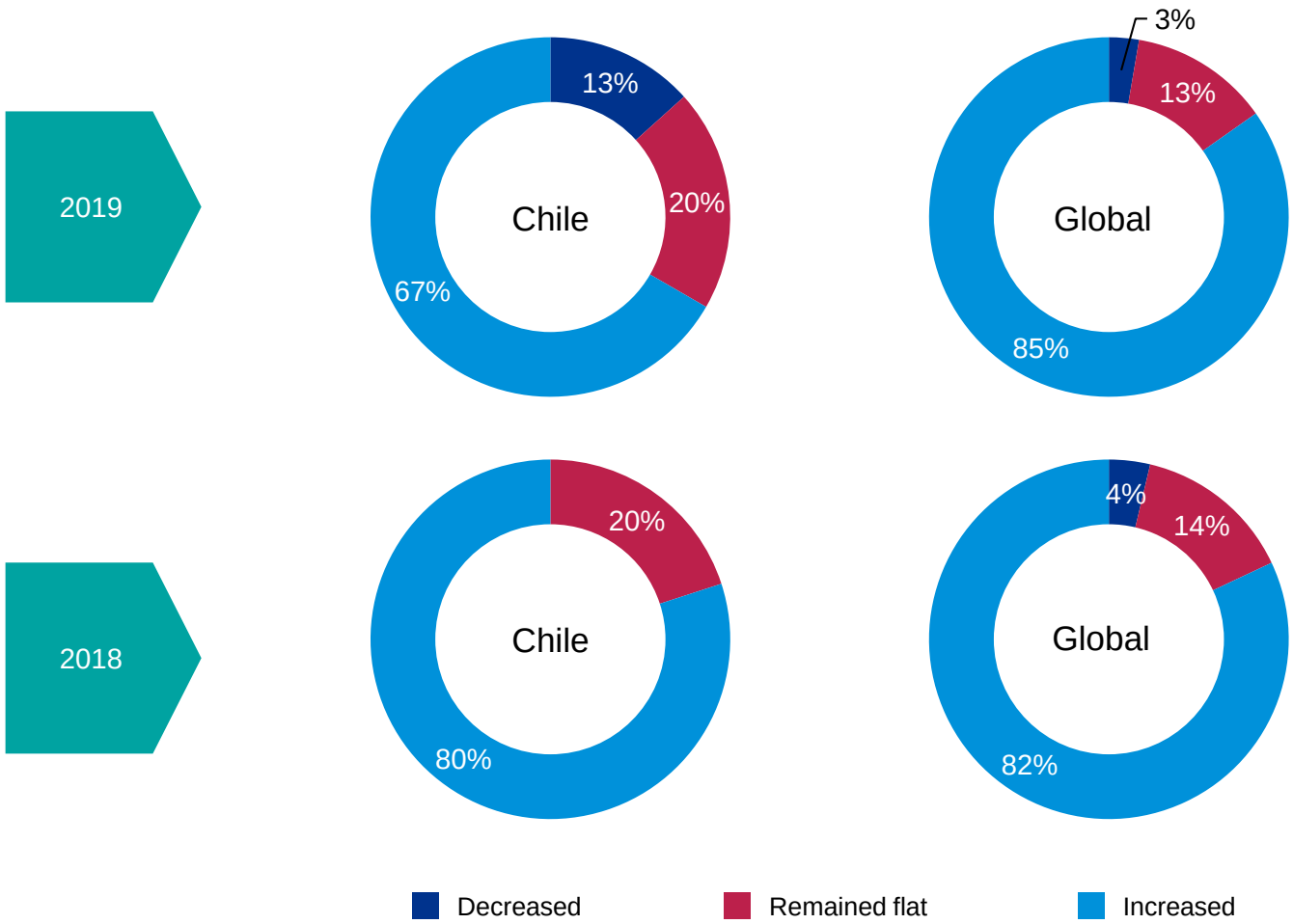
Contexto

C3. ¿Cómo cambiaron los ingresos de su organización en su año fiscal más reciente, en comparación con el año anterior?



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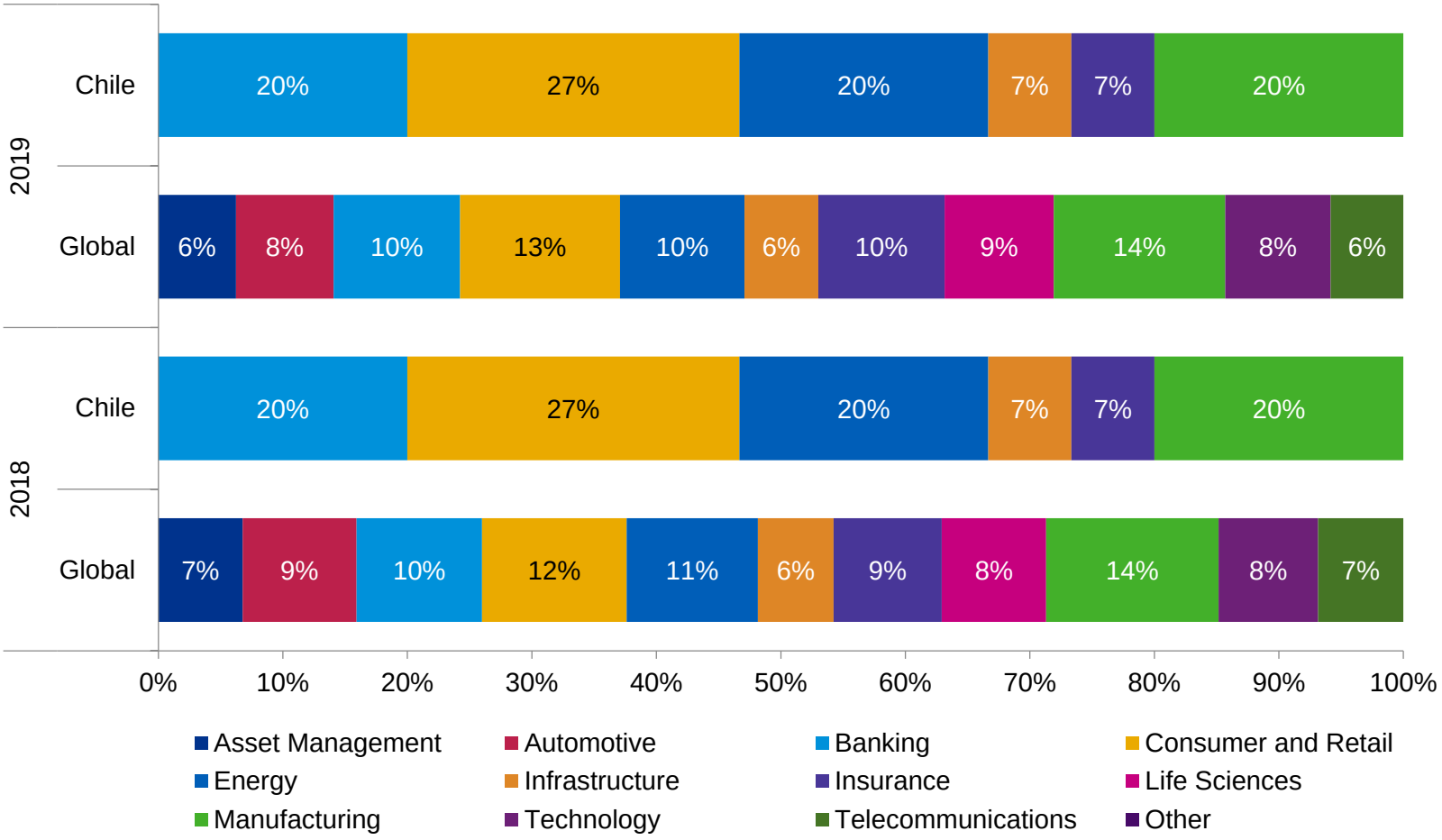
Contexto

C3A. ¿Cuál de las siguientes opciones describe mejor su industria?



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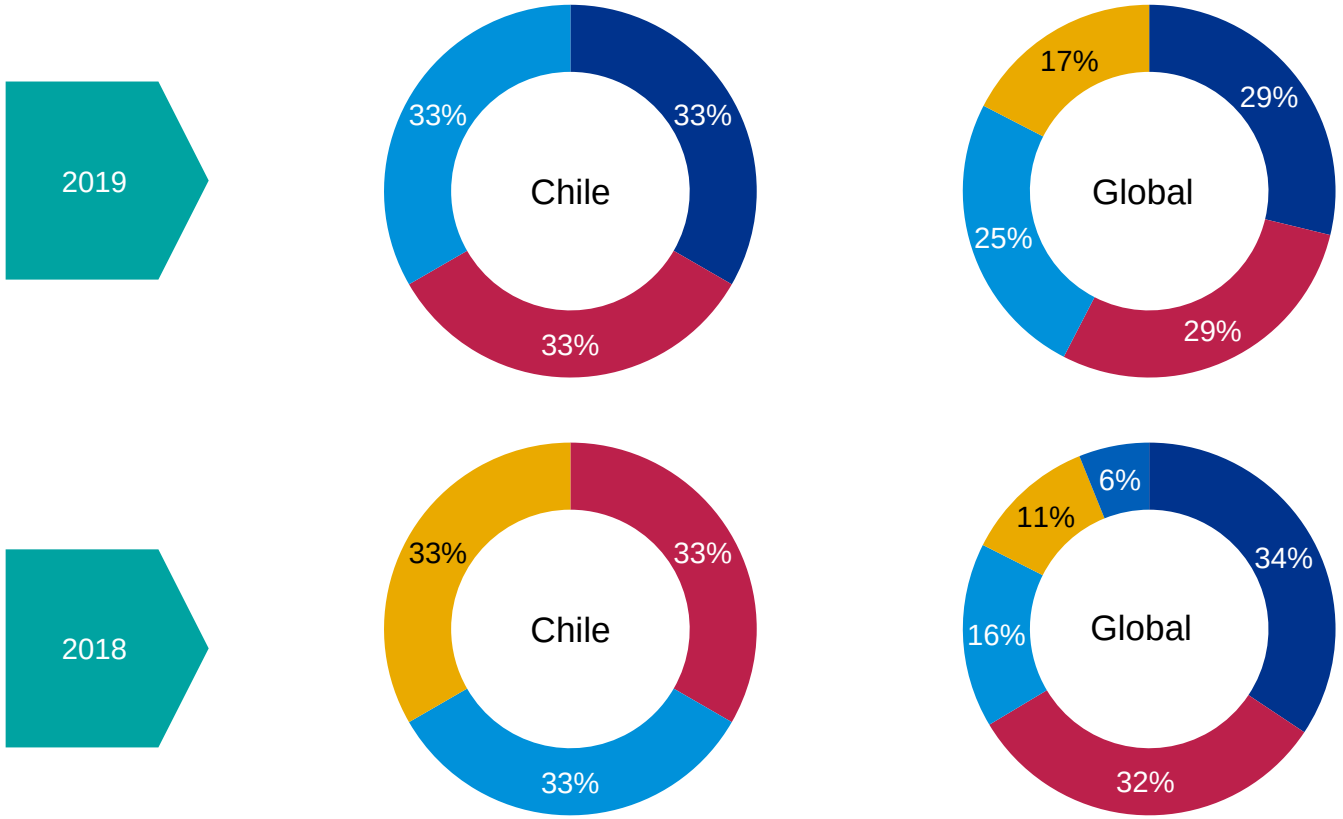
Contexto

C3B. ¿En qué subsector (es) específico (s) de la industria bancaria opera principalmente su empresa?



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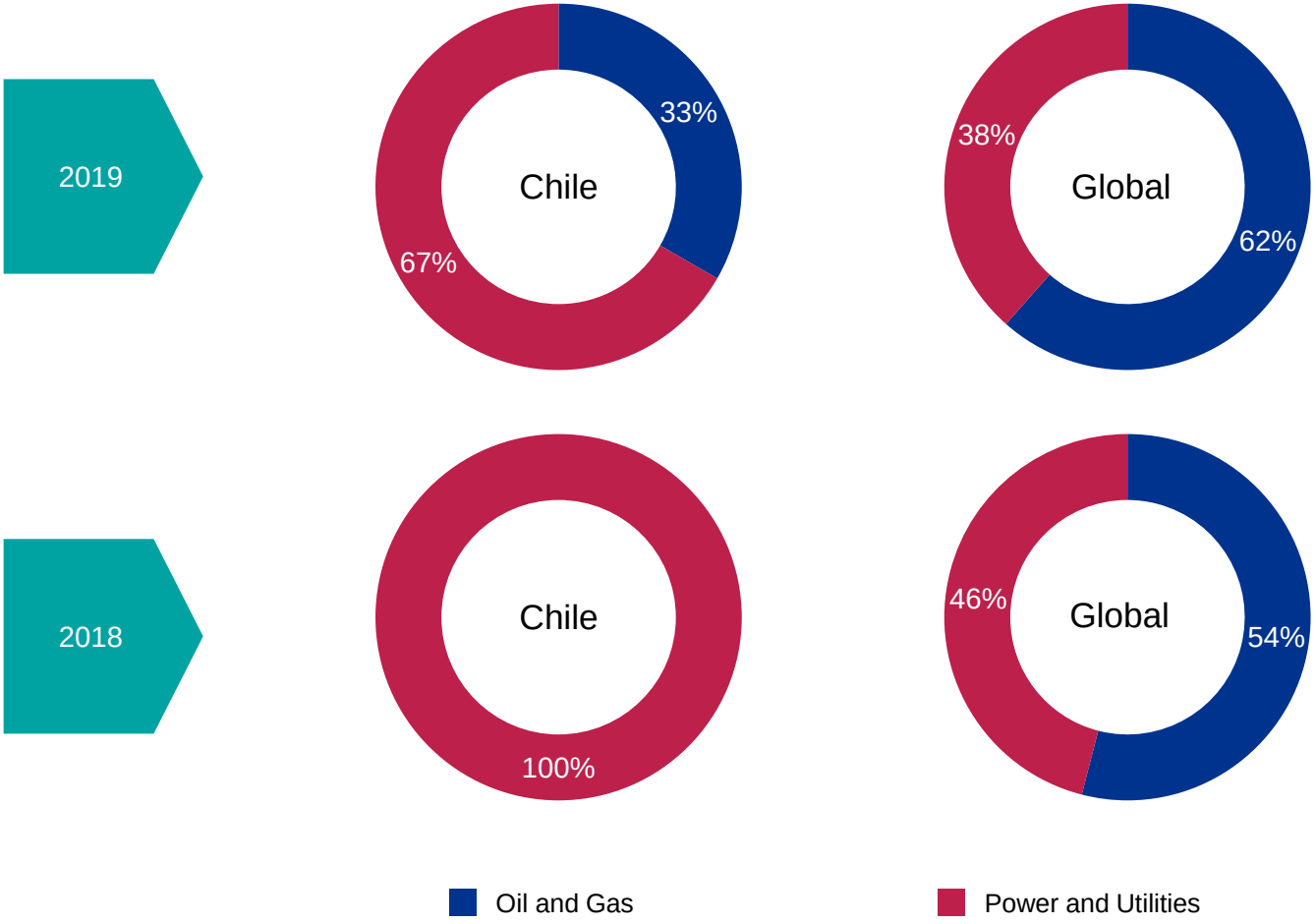
Contexto

C3C. ¿En qué subsector (es) específico (s) de la industria de la energía opera principalmente su empresa?



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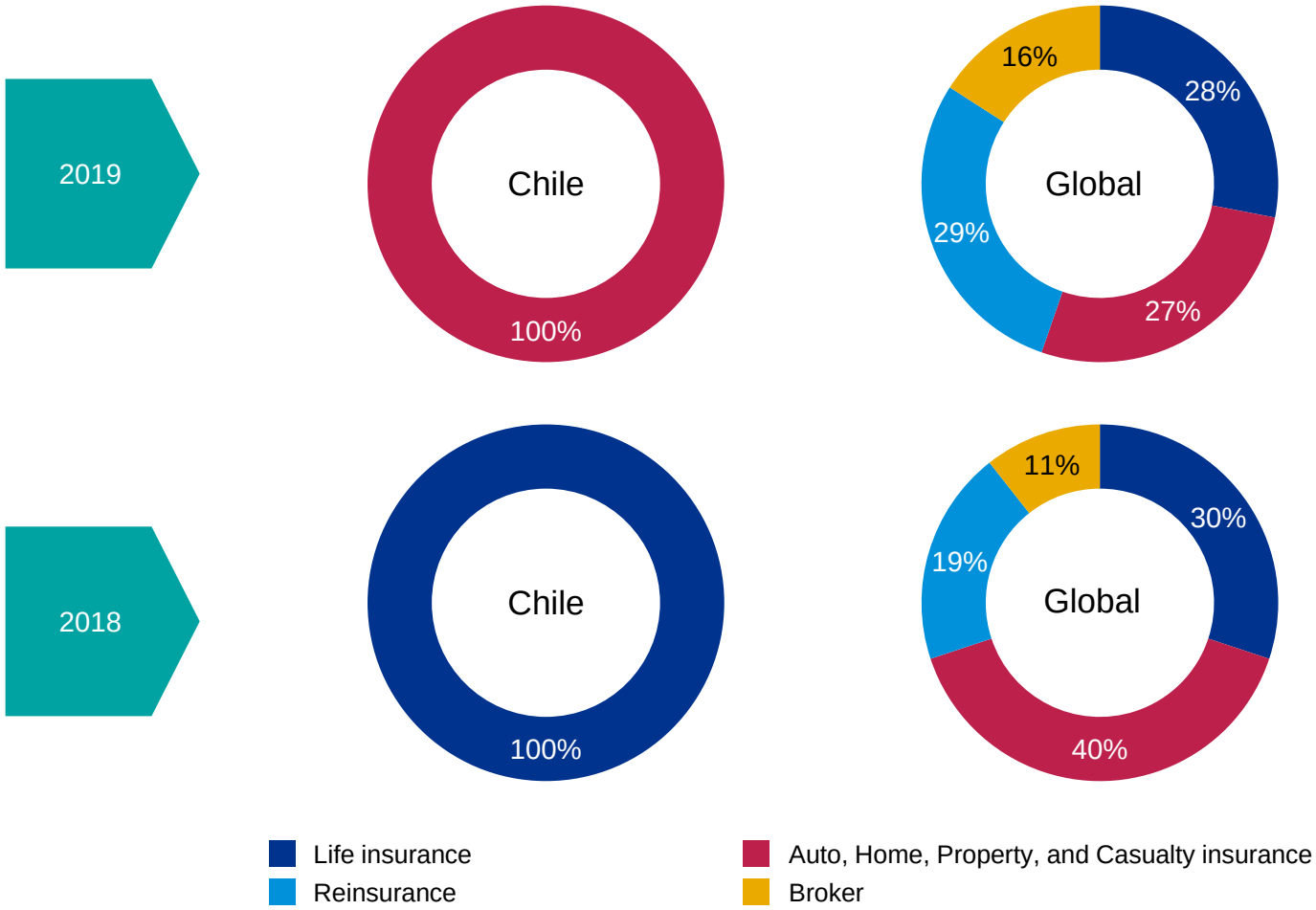
Contexto

C3D. ¿En qué subsector (es) específico (s) de la industria de seguros opera principalmente su empresa?



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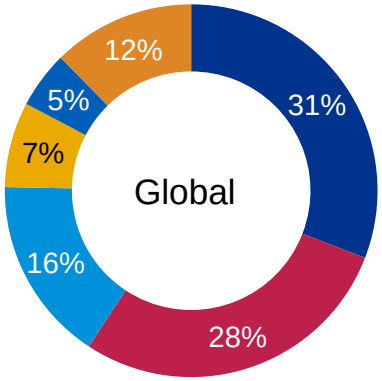
Contexto

C3E. ¿En qué subsector (es) específico (s) de la industria de gestión de activos opera su empresa principalmente?

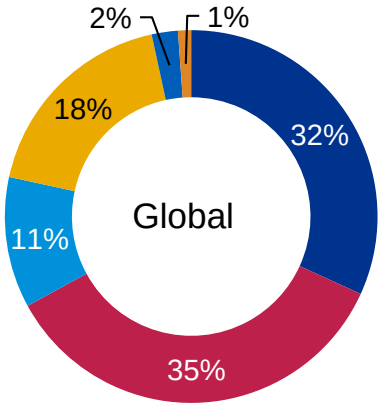
2019

0%



2018

0%



Broker, financial advisor
Real estate
Wealth management
Other alternative investments
Hedge fund
Traditional asset management (i.e. primarily equities and fixed income)

n= 81

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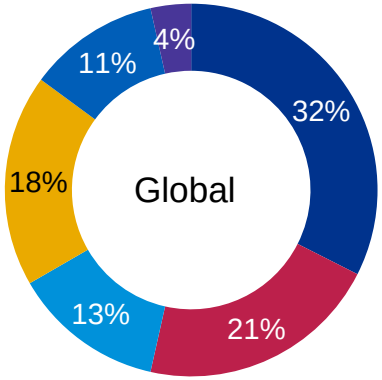
Contexto

C3F. ¿En qué subsector (es) específico (s) de la industria de las ciencias de la vida opera principalmente su empresa?

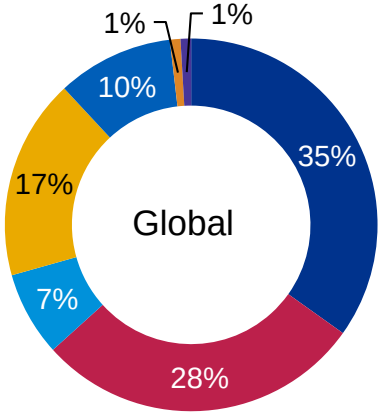
2019

0%



2018

0%



Pharmaceuticals
Nutraceuticals
Biotechnology
Plant sciences
Medical research and testing
Distribution
Medical devices

n= 114

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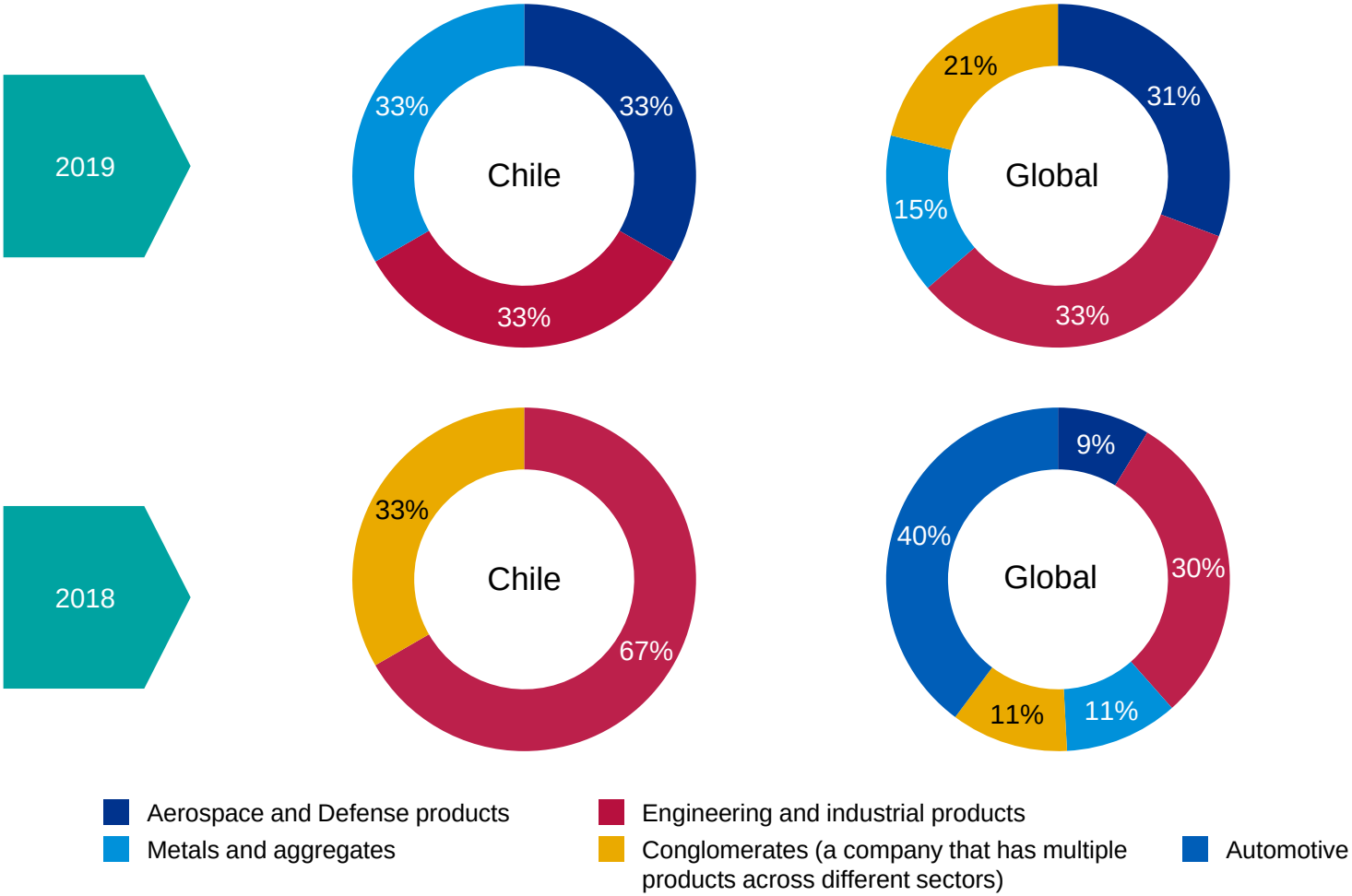
Contexto

C3G. ¿En qué subsector (es) específico (s) de la industria manufacturera opera su empresa principalmente?



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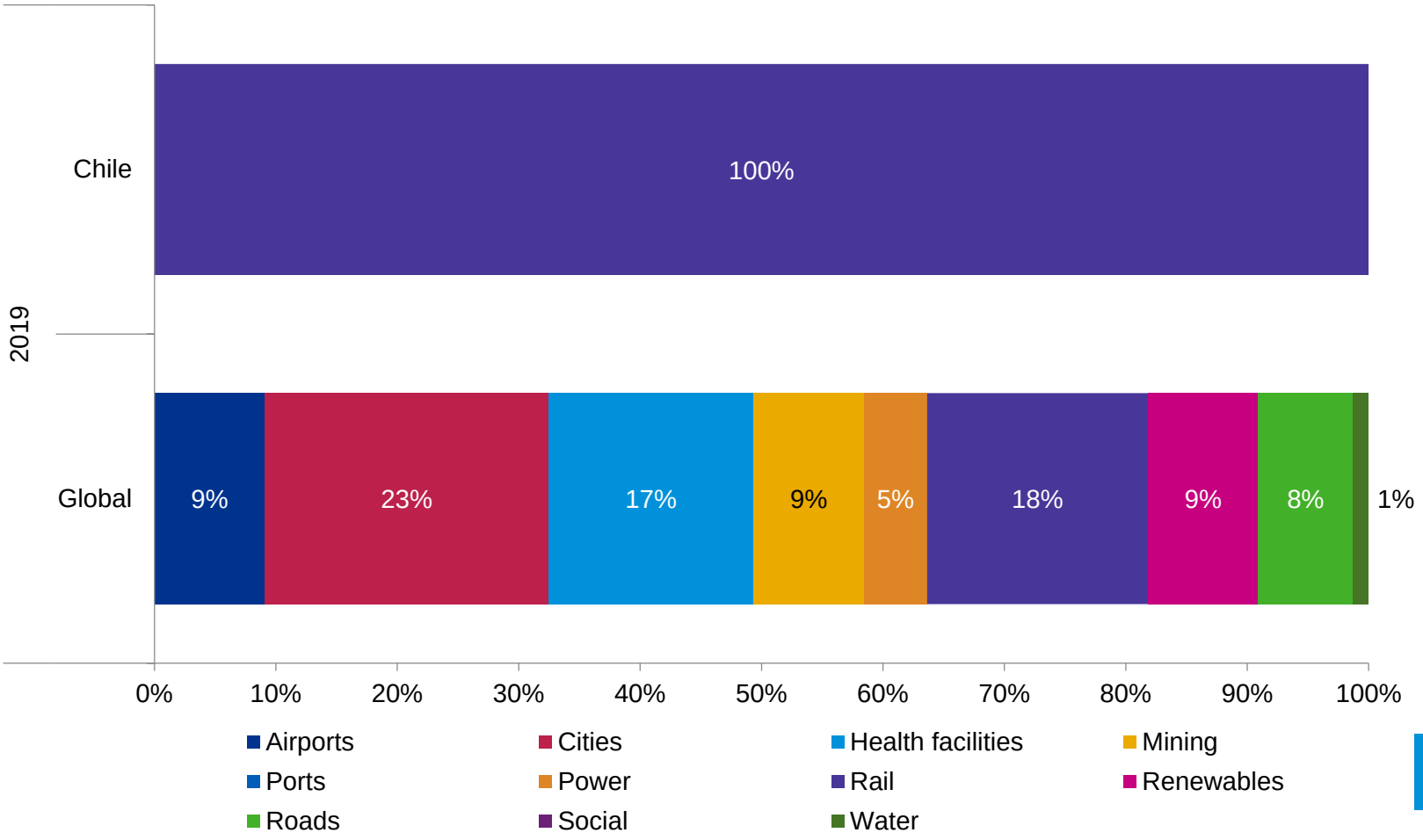
Contexto

C3H. ¿En qué subsector (es) específico (s) de la industria de infraestructura opera principalmente su empresa?



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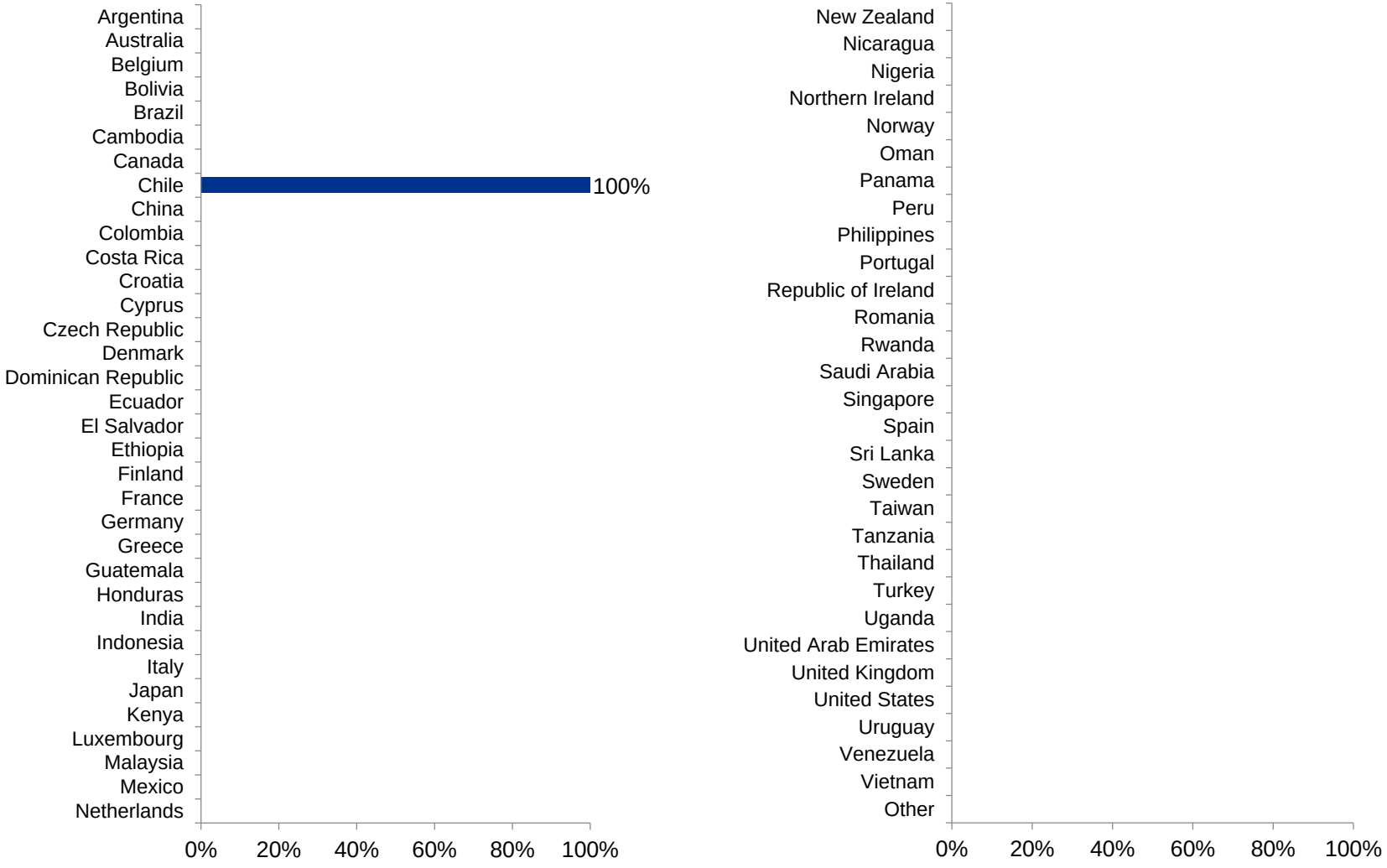
Contexto

Chile 2019

C4A. ¿En qué país tiene su sede su empresa?



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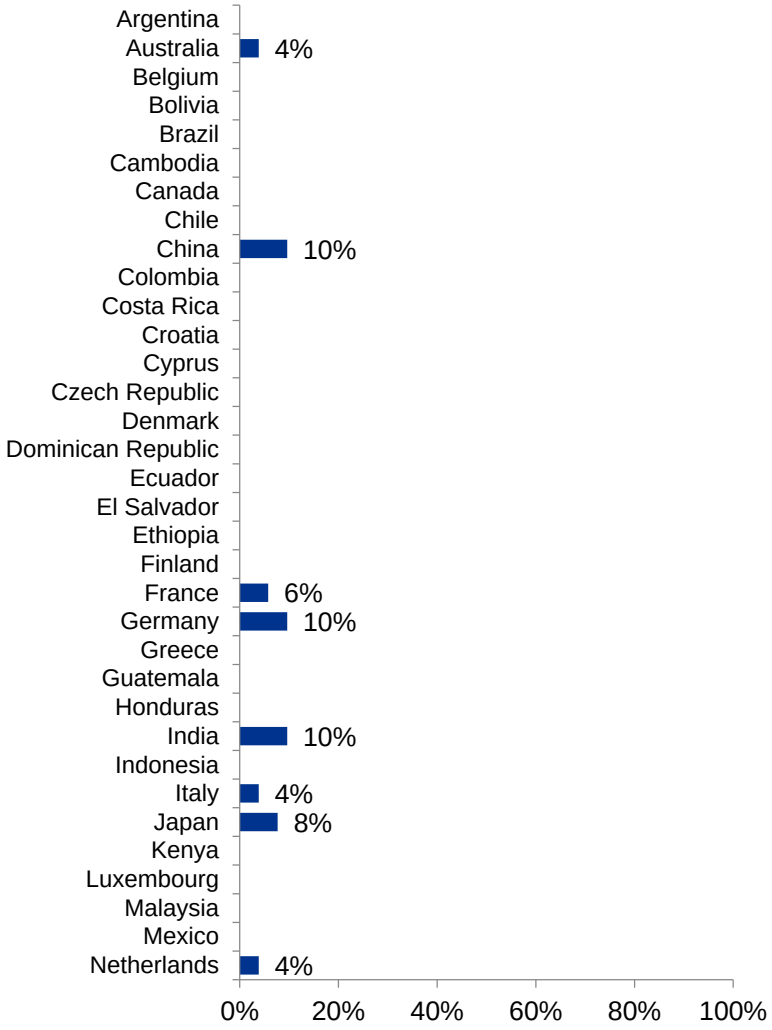
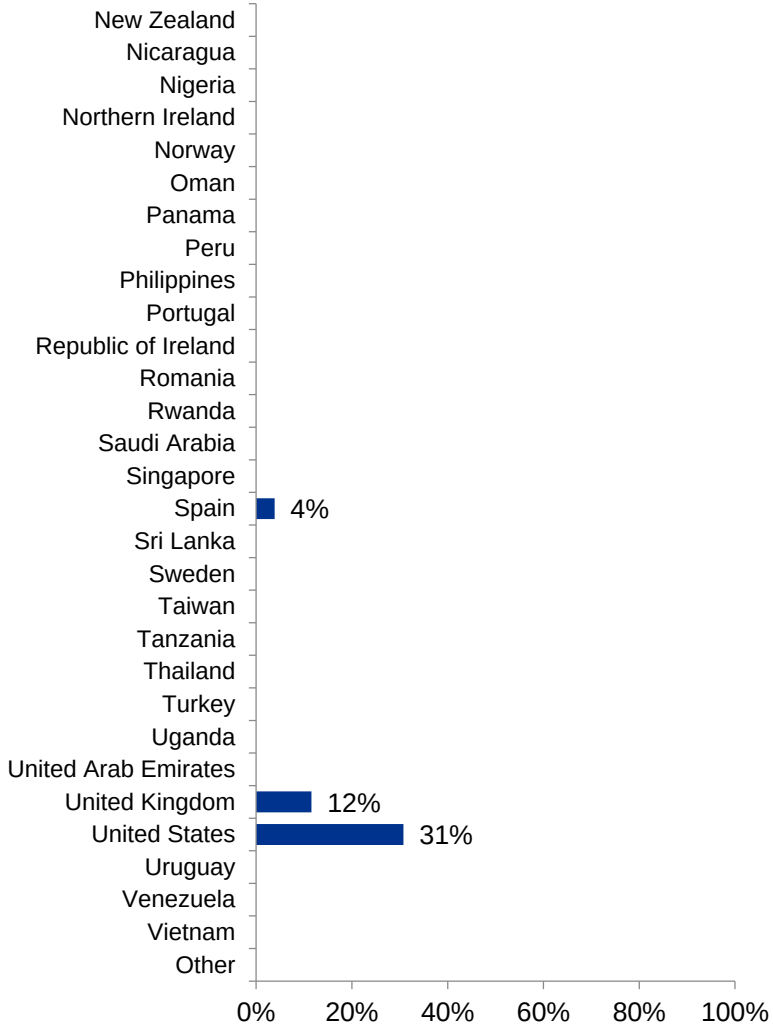
Contexto

Global 2019

C4A. ¿En qué país tiene su sede su empresa?





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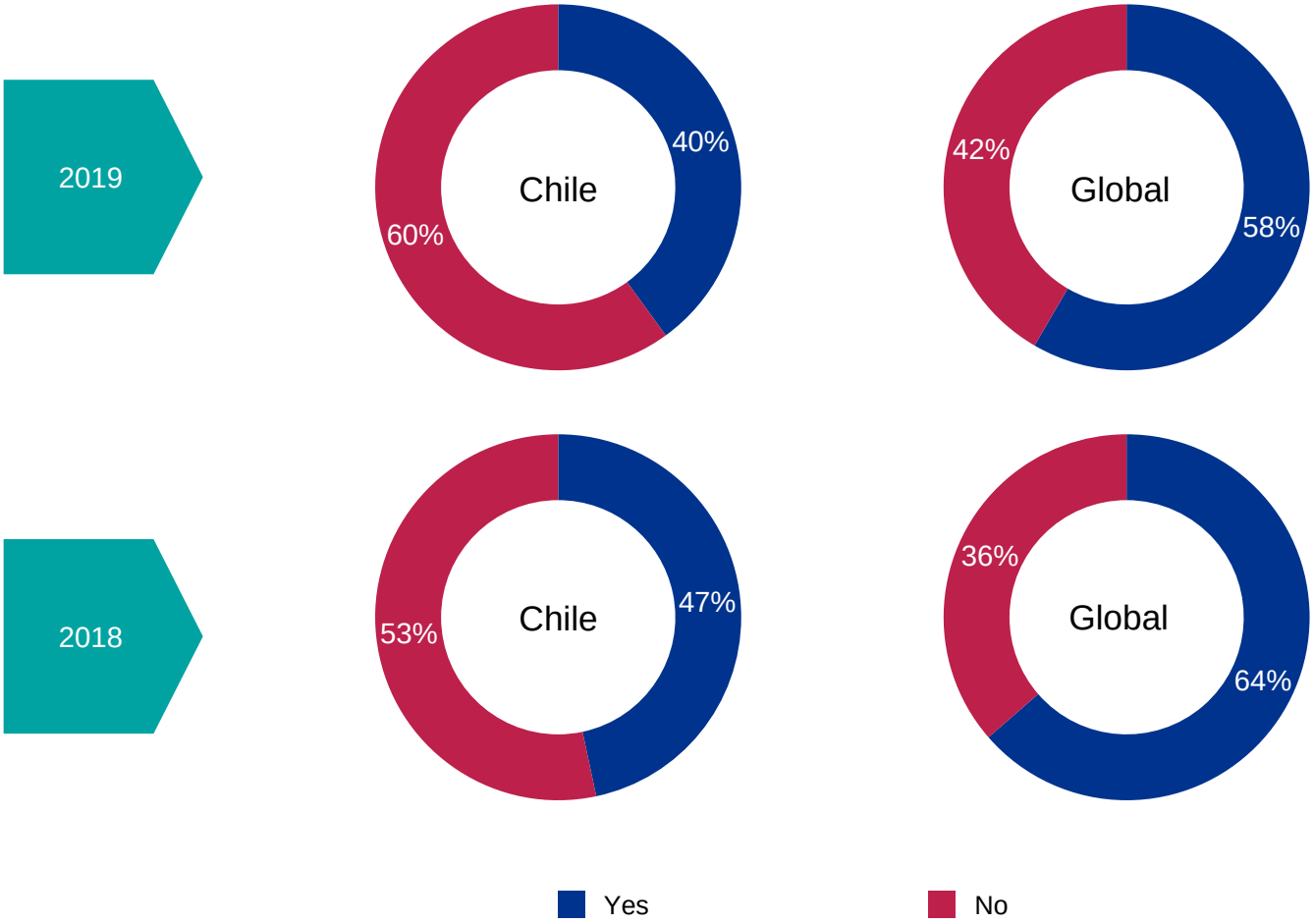
Contexto

C4B. ¿Su organización opera actualmente en el Reino Unido?



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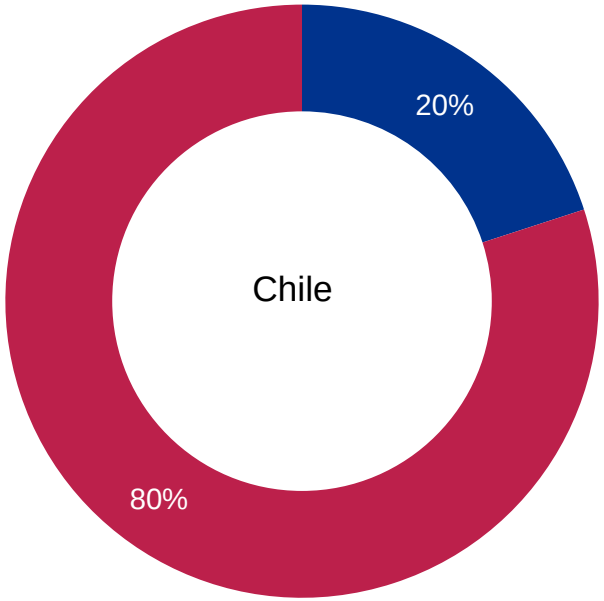
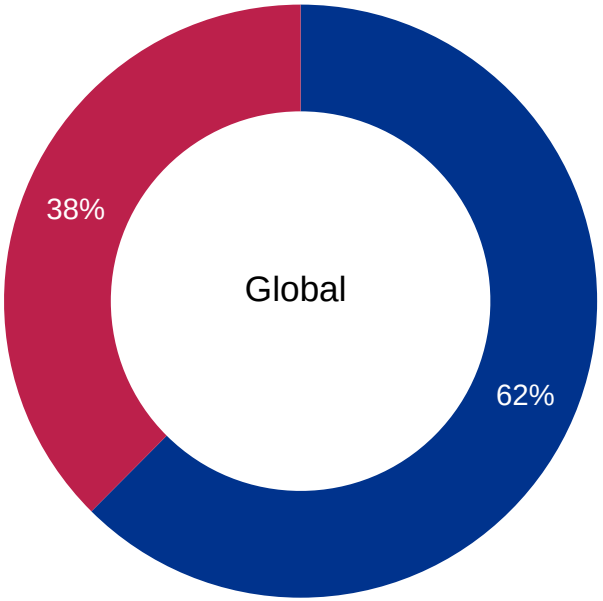
Contexto

C5. ¿Cuál es la estructura de propiedad de su empresa?

2019





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Privately held

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