



The 2017 SHIPPING FORECAST

Leadership insights from the
New World Talent Survey

Vol. 8



Her bright and tenacious beam,
relentlessly strong and searching



The 2017 Shipping Forecast

“If the highest aim of a captain were to preserve his ship, he would keep it in port forever”
St. Thomas Aquinas

Welcome to The Lighthouse Company’s annual findings from our eighth successive New World Talent Survey. Launched in 2010, the survey serves to further explore and quantify the critical themes and hypotheses the Lighthouse has identified and observed during the thousands of interviews and hundreds of searches we have undertaken in partnership with many of the most progressive companies in the media, marketing, advertising and technology sectors over the past twelve months.

Conducted in January 2017, these latest results represent the collective views, opinions and inner-thoughts of over 600 C-suite contributors across our industry, from all corners of the globe, with this year’s observations and conclusions distilled into three distinct areas.

In consulting within the industry’s boardrooms, combined with our continual representation of the sector’s finest leadership talent, the survey seeks to highlight the critical patterns emerging and evolving – with the aim of forecasting the matters needing particular attention from us all in the year ahead.

Firstly, our annual barometer continues to track the key talent and business performance trends within our sector – a constant watchtower for the changing outlook amongst those who lead. Secondly, ‘Lost at C-suite’ identifies and ratifies a number of factors with the potential to deeply impact our industry’s talent – namely the rip-tide of transformational leadership, fundamental ageism, and the rising demand for purpose and values. Finally, The Psyched Index focuses on the mental and emotional strength and health of our industry’s leaders, executive teams and employees, with a particular focus on the highly emotive and topical theme of mental performance.

As with every year, these patterns and projections aim to help our industry’s leaders navigate the unchartered waters that lie ahead in the next twelve months. Individually and collectively, we have the leadership responsibility and capability to continue to positively drive the health of our incredible sector and its formidable talent.

2017 is a year when we very much feel the captains are required to take their ships out of port. Yet it is not the ship so much as the skilful sailing that assures a prosperous voyage – and so for our part, we hope the data within will offer some meaningful navigation for your year ahead.

Reading Beyond the Barometer in 2017

2017's New World Talent Survey seeks to identify and ratify key trends within the advertising, media and technology space. As a constant tracker of the thoughts and opinions of our industry's leaders, these results can be both surprising and illuminating.

On the face of it, our industry's leadership talent appears very content with their current positions – 71% of those surveyed claim to be fulfilled in their role. Rising thirty percentage points since 2015, this score continues to improve on 2016's five-year high. However, when considered alongside some of our other barometer results, perhaps this sentiment is symptomatic of a wider desire to avoid rocking the boat rather than true contentment.

For example, when asked about growth prospects of their business in 2017, 41% of our leaders were confident with 16% acknowledging concern. What appears a positive result should be observed alongside a consistent decline in confidence since 2015. We anticipate an undercurrent of disquiet, and if this trend continues, we will see 2018's future confidence return to lows not seen since the depths of the 2008 recession.

TAKING (OR LEAVING) IT PERSONALLY

While the continued increase in our leaders' career fulfilment may indicate a more stable workforce, the actions of those surveyed appear to run counter to this. 85% of those questioned have thought about making significant changes within their careers – a figure that has risen considerably since 2016's position.

39% of leaders have contemplated leaving the industry (+44% y/y) while 58% have considered moving companies (par with 2016). Whether anticipating future growth opportunities or even potential exit routes, 15% have considered consolidating or merging their business while another 10% have thought about selling up. There is a definite sense that our leadership fraternity is witnessing a period of uncertainty. Yet our industry continues to breed the entrepreneurial

mindset. Two in five have seriously considered setting up a company on their own – irrespective of follow through, we have still seen a 22% increase in desire to do so. From our vantage point, this level of leadership transience could present a potential danger for our industry.

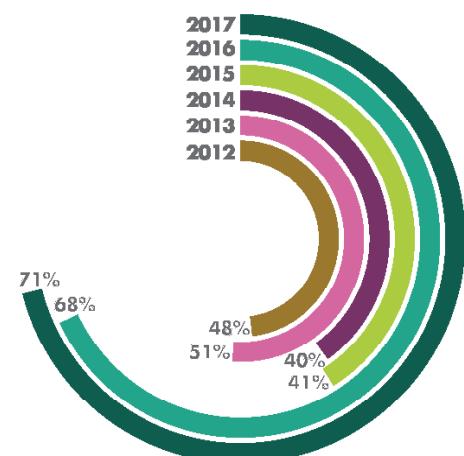
There are many factors, both industry-wide and personally, that can impact these individual motivations. However, through consistently tracking how well companies plan leadership succession – and despite repeated calls for our industry to do better in this area – this year's results appear to echo 2016's 'distinctly average' score. Perhaps this unsettled view is further driven by the uncertainty of one's own position and lack of prospects within the organisation?

CHANGING LANES

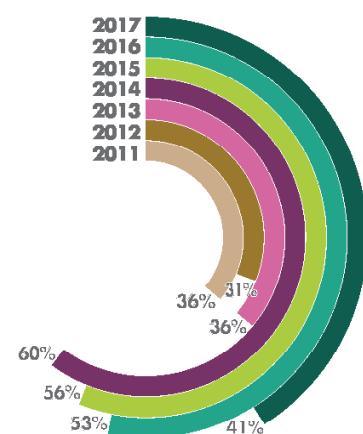
When asked about where they would like their next role to be within our immediate industry, 2017's findings remain broadly in-line with previous years. Media owners remain top choice for next roles (33%), while the agency world has rallied back to a position comparable with figures not seen since 2014 (21%). The desire for leaders' next role to be on the client side remains as popular as it was in 2016 with 10% of our respondents choosing this option; a trend we've heard qualitatively through our thousands of conversations with candidates each year.

However, there are two notable points to watch for the future. Firstly, a three year decline in those wishing to join a 'tech business' appears to point to the infiltration of technology across every part of our industry – it is no longer seen as a 'thing' of its own. Secondly, on closer examination of desired agency moves, we continue to see declines for specialists offset

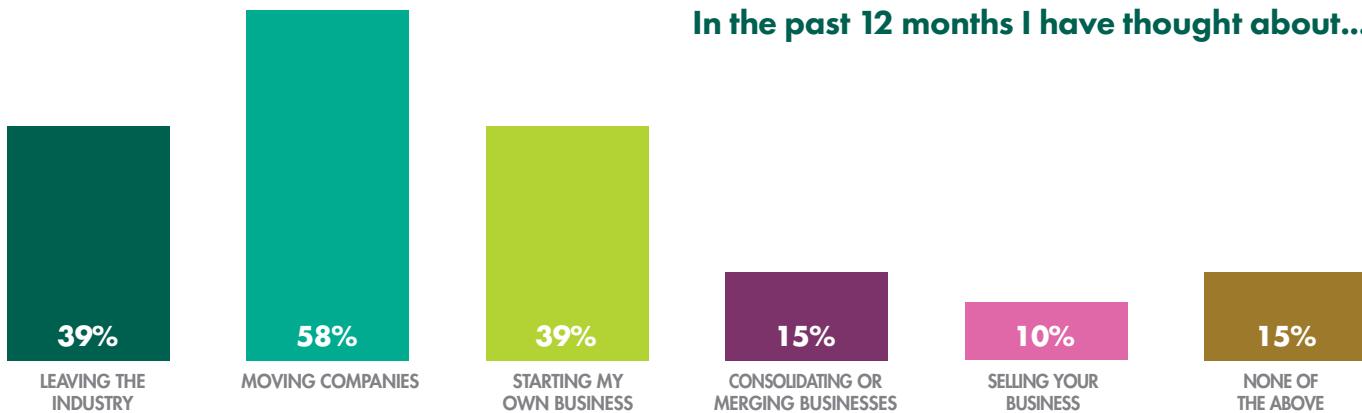
I'm feeling fulfilled in my current position...



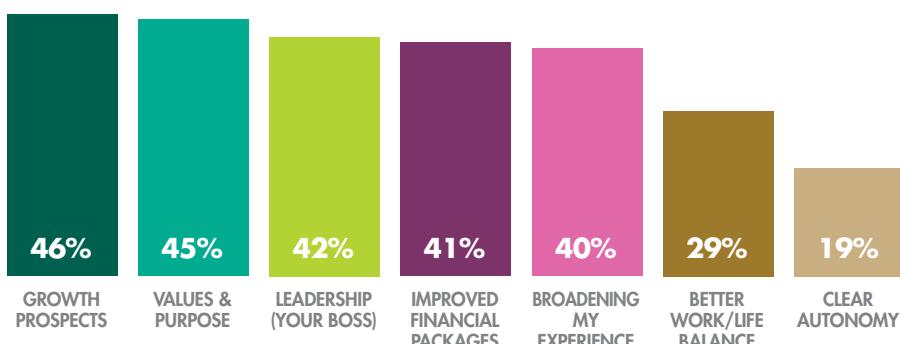
I'm feeling confident about the likely growth prospects of my business...



In the past 12 months I have thought about...



The elements most likely to influence, inspire or attract me to my next career move are...



by a four-fold rise in those looking to join an integrated shop (24% of those choosing agencies). A return to a new model of full-service, such as the Havas Village, is certainly appealing to our leaders.

MAKING MOVES WITH PURPOSE

We continue to see consistency across the core elements that would inspire or influence our leaders to move roles. Growth prospects (46%), senior leadership (42%), improved financial packages (41%) and broadening experience (40%) remain incredibly potent persuaders.

A first-time option for 2017, an organisation's values and purpose was scored as the second most persuasive move factor by 45% of respondents. Overall, 96% of respondents deemed the clear articulation of these as critical for attracting the best talent.

Across the past six years, the only factor to consistently increase has been the desire for a greater work/life balance. Almost 29% of leaders cited this as a move motivator; up 70% since 2012. Meanwhile, many leaders appear to have given up on clear autonomy in their role – alluding to a more global corporate way of business – with fewer than one in five citing

autonomy as a real reason to switch roles. More on this to come later in the report.

HEED THE HEADLINES?

Our annual barometer continues to track the perceived performance of our industry's brands over the past year and we continue to observe relentless change and disruption in these results. While these provide an interesting snapshot in time, the over-arching trends provide even greater insight.

The key lesson from both ends of the spectrum is that quantum, scale and results are critical in shaping perceptions and headlines. Topping our table is the somewhat expected dominance of Facebook and Google alongside ITV's continued presence through its lead of the TV market. As the digital darling of 2016, few would dispute Snap Inc's top five place, while a stunning run of account and award wins – from Volkswagen to Campaign's Media Network of the Year – ensured PHD was voted the top performing agency in our survey.

At the other end of the scale the dominance of negative headlines on our perceptions was equally apparent with Twitter, Facebook, The Guardian, Hearst, ITV, AOL and Google contributing to a broad channel mix of those

who were felt could have done better.

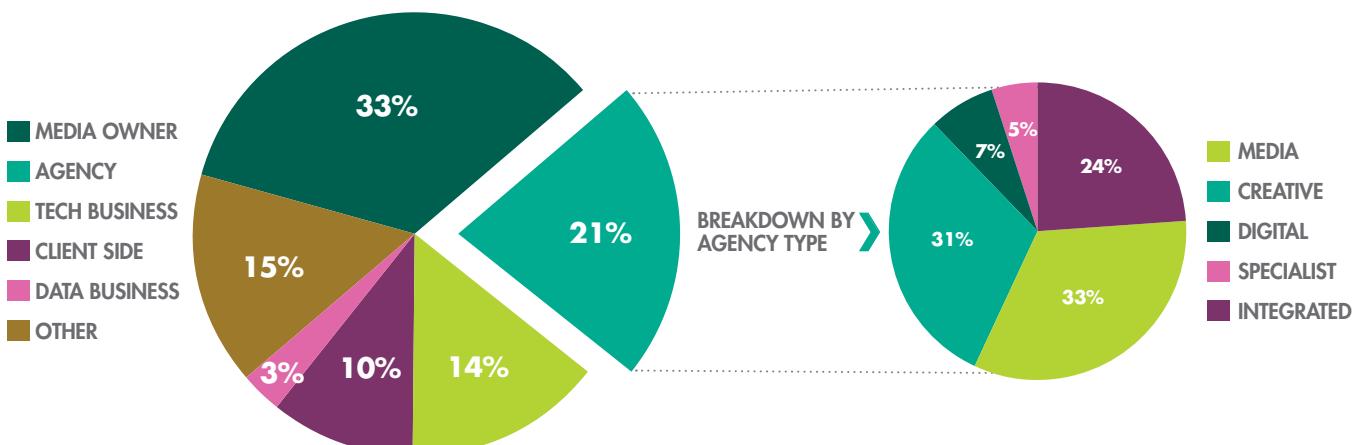
Two final observations from these results. Firstly, clear difference can really improve positive positioning; despite their relative size to the other agency networks, the successful independence of the7stars and Lucky Generals helps them stand out from the crowd. Secondly, for the first time in our survey's history, we have seen the compound impact of a sector's performance influence its ranking – 'newsbrands' were clubbed together as the number three business that could have done better. The future success of market-building initiatives such as Project Rio has never been so critical.

What these results clearly show is that perceived success – or indeed failure – within our industry is dictated by the unequivocal headlines of the year. Yet, as past results have highlighted, every 12 months can tell a very different story – 2017 has no doubt already seen the start of a new chapter.

Which businesses really performed in 2016?



I would like my next role to be...



Lost at C-suite

For eight years we have identified many emerging leadership patterns across the advertising, media and technology sector. This year our pre-research discussions with senior leaders led us to identify three key areas in need of attention within our sector – and have been very much substantiated within this year's results.

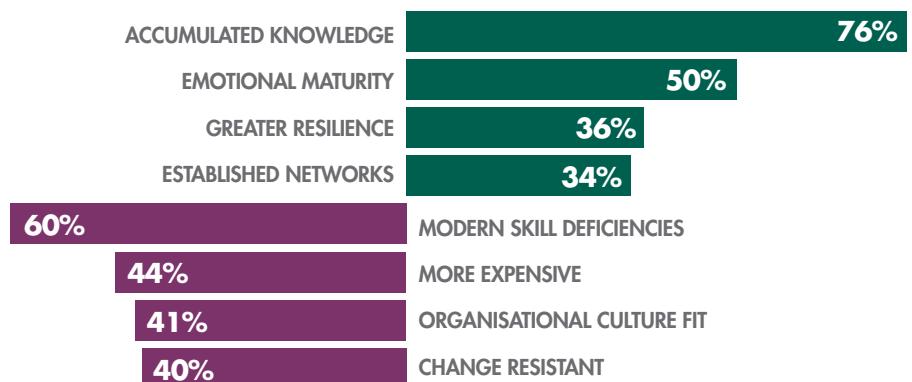
1 TO TRANSFORM & PERFORM

Given the effects of relentless disruption, ensuring the right leadership dynamics are at play within our organisations is key for the sector's overall health. Few can deny the unprecedented period of transformation we are facing and the rate of change at which this is occurring. At the Lighthouse we are asked on a weekly basis to find 'transformational CEOs' and yet in the last 12 months we have noticed a palpable decline in the number of leaders fully willing (or able) to truly autonomously lead with brave and dynamic vision.

Our survey identified a number of clear characteristics as most desirable to lead transforming businesses. The combination of vision (chosen by 77%) and courage (34%) highlights the importance of forward thinking and gumption to be brave enough to make the right decisions for now and for the future. This was counter-balanced by the human capacity to connect with those around us; 47% claimed authenticity was a hugely desirable trait, with another 44% citing the capacity to engage with all employees as critical. Today's leaders need to be seen, be heard AND be understood.

However, rather worryingly, the very traits that are the most desirable are also the characteristics sadly deemed to be the most lacking in our industry. Almost 70% of those surveyed cited six common qualities they believed to be most absent in our leaders as being vision (20%), authenticity

Pros and cons of mature employees



(12%), courage (10%), bravery (8%), ability to engage with all (6%) and honesty (6%).

Two key points dominated the majority of our respondents' answers to the primary reason for this apparent drought of transformational leadership. Firstly, 33% blamed the growing need to conform to a corporate or network-wide way of working – are we giving our leaders enough room to do things their way?

Secondly, the capacity to learn, to fail, to course correct, and to experiment appears to have equally narrowed given the pressures on exponential growth and delivery to shareholders or VC's – and so we wonder if the risk and reward is great enough to dive into the riptide of being a transformational leader. Are we creating the right conditions and environment for the visionary to lead from the bridge? 20% identified the fear of 'getting it wrong' for stifling the leadership most needed today.

A recent Harvard report revealed the biggest personal stressor was the potential fear of losing our jobs, increasing our odds of poor physical health by 50%. Perhaps we need to do more to ensure the human capital our industry has nurtured does not feel overly disposable – we should be taking more time to support and

encourage those who bravely venture the unchartered seas on behalf of us all.

2 OUT WITH THE OLD, IN WITH THE NEW

Diversity, inclusion, equality – there's never been a greater focus on fairness within our industry. The gender agenda has never been far from 2016's headlines and we rightly expect this to continue. However, this year we investigated an area of imbalance that most of us will expect to encounter in our later years – age.

Two years ago, we asked our leaders what age they believed they would leave the industry. 70% said between the ages of 51 and 60 with a further 13% anticipating continuing their careers until well into their 60s – which was highly at odds with the facts from the IPA stating that the majority will leave the industry for good before they reach 50.

While the wisdom and maturity of great leaders may help these individuals maintain greater relevance in today's organisations, what about everyone else? Almost three-quarters of those we surveyed believe less than 20% of their company is aged 45+. Yet our respondents state mature employees provide a truly human upside in the workplace – emotional maturity (50% agreement), resilience (36%) and insightfulness (33%) – as well as the great benefit of accumulated business knowledge (76%) and established networks (34%).

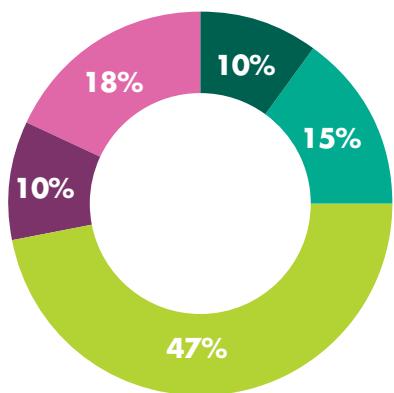
However, it could be the accumulation of this legacy knowledge is providing a barrier to older workers with modern skill deficiencies (60%) being cited as the greatest challenge for employers (followed by expense at 44%, organisational fit at 41% and change resistance at 40%).

At all stages of our career we must ask ourselves how much of what we have accumulated remains relevant and what can be decluttered to create space for new learning. The trappings of the past – be that what we know, what we

What is the primary reason we are sensing a drought on new transformational leaders?



If your leadership tenure had a 'sell-by date' how would you know you had exceeded it?



do, or even what we earn – may not be what we can expect to have in a new working future.

When we asked our respondents how they would know if their leadership tenure had reached its 'sell by date' the primary reason was clear. Nearly half (47%) claimed they would no longer feel an innate sense of passion for their business – scoring three times higher than any other factor. However, we believe this loss of passion can be overcome by ensuring the over-stretched leadership mind retains the capacity to process and apply what makes us curious.

Fundamentally, age should not be a barrier to continued success. In many industries, such as biotech and business software, years of wisdom provide clear advantage. According to the Kauffman Foundation, the average age of a successful start-up founder in these accelerating industries is 40; with those aged 55+ almost twice as likely to launch a high growth business as those aged 20 to 34. If we can make room in

- MY PRIORITIES WOULD HAVE SHIFTED ELSEWHERE
- I'D NOTICE A LACK IN MY NATURAL CURIOSITY
- I'D NO LONGER FEEL AN INNATE SENSE OF PASSION FOR THE BUSINESS
- I'D CARE LESS ABOUT THE ORGANISATION'S AIMS AND MORE ABOUT MY OWN
- OTHER

our minds and hearts to continually learn and enquire, no matter our magic number, we will remain relevant and open to the future.

3 POWER OF PURPOSE

A recent survey by the Harvard Business Review (HBR) of c.500 senior leaders shows near-unanimity of the belief that clear purpose drives business performance; both from a transformational and an employee motivational perspective.

Our own research echoes this; 96% of our industry's leaders believe a clearly articulated purpose, meaning and set of values is vital in attracting the best talent. With 45% agreement, it's also the second most important factor influencing leadership moves.

In HBR's survey less than half of executives believe their company has actually articulated a strong sense of purpose – with only a handful having embedded it to its full potential. Within

our own industry, less than a quarter believe their business has a 'very clear' purpose and values – yet in our view when they are not crystal clear, they cannot be understood across the organisation – so they don't really exist at all.

For our leaders, there appears a clashing triumvirate of purpose, passion and pay-packet. The majority (56%) of our respondents would not take a pay-cut to lead or work for any other company within our industry. Contrast this with millennials; The Future Laboratory (2016) states 83% would be willing to take a 15% pay-cut to work for a company with shared values.

Two themes dominate for our leaders who are willing to take a pay-cut. Firstly, Facebook, Google, Snap Inc. and Spotify are very attractive due to their potential future growth, the technology itself and the potential to use these tools for good. The second group of organisations such as BBC, The Guardian and Channel 4 are all organisations respondents identify as having a strong ethos and clear purpose.

It's worth noting some leaders would consider reducing salary for a move outside our industry; be it a charity, NGO, political party or other organisation with a clear and authentic purpose.

In summary, the need for a human, visionary, brave leader has never been more sought or needed, but we must support them when they take the helm. Age is but a number – letting go of old knowledge, views, behaviours and methods allows space to welcome in the new – stay relevant and vibrant. Be clear in your vision and values and live them. As they increase in their prevalence of why people choose to work for you personally or your company professionally, remember clarity and consistency win.

Which company would you be willing to take a pay cut to lead/work for?



Snap Inc.

1. NONE

facebook

3. FACEBOOK

Google

4. GOOGLE



BBC
the guardian

6. BBC / THE GUARDIAN

Which company in our industry would you be most inspired to work for?

facebook

Google



1. FACEBOOK

2. GOOGLE



3. SNAPCHAT



5. SKY



6. ITV

Who has demonstrated an outstanding ability to lead in 2016?



1. SIR MARTIN SORRELL



2= JENNY BIGGAM



2= JAMES WILDMAN



3. STEVE HATCH



4. DAREN RUBINS



5. JONATHAN ALLAN

The Psyched Index

The 2016 Mental Health at Work Report highlighted the concerning fact that 77% of employees have been affected by symptoms of poor mental health in the last year, with 62% of employees attributing their symptoms directly to work or feeling work was a contributing factor.

UK Prime Minister Theresa May acknowledged in January 2017 that for too long “mental health has been shrouded in a completely unacceptable stigma and dangerously disregarded as a secondary issue to physical health”.

In response to this developing dialogue, the Lighthouse last year launched Psyched, a transformational development business. Psyched was specifically designed to take better care of our modern-day leaders’ ‘whole self’ and guide them in supporting the people they lead. As we look to the results of our Psyched Index in this survey it seems our timing was critical.

IT'S TIME FOR ACTION

The evidence for tackling the negative effects of poor mental health has never been clearer, both at a macro-population level and more specifically within our workplaces. A 2015 study by Harvard Business School and Stanford University concluded that workplace stress is as bad for us as second-hand smoke.

Perhaps you won’t be surprised the World Health Organization now cites stress as the 21st Century’s biggest health epidemic, costing the UK economy alone £57 billion a year in lost

productivity, while closer to home The Drum’s 2016 Diversity Census indicates that 27% of those in our immediate industry described themselves as ‘stressed most of the time’.

2017 brings a first to our New World Talent Survey, as we made a conscious decision to mirror a number of questions asked in the National Employee Mental Wellbeing Survey 2016, reflecting the voices of nearly 20,000 individuals*. Branded ‘The Psyched Index’ we now have the ability to benchmark the views of our industry’s leaders versus the population at large providing huge insight into the overall wellbeing of our industry’s biggest asset – its people.

WE (STILL) NEED TO TALK

When looking at which topics our industry’s leaders are comfortable talking about in the workplace, there are clear signs of great progress in some areas. There is no doubt that the sterling work of organisations such as WACL combined with the growing public reprimand of misogynistic behaviour has helped 77% of our leaders be more open to talking about gender at work; 38% higher than the working population as a whole, and 13% greater than managers across all industries.

Similarly relationships with others (77%), sexual orientation (65%), physical health conditions (65%) and race (62%) are conversation topics that the majority of our industry leaders are happy to have.

However, at the opposite end of the spectrum, there are clearly three topics that still appear taboo – mental health, disability and religion. Perhaps

driven by the discomfort and fear of potentially saying the wrong thing, or remaining tentative in approach, it is clear we still have work to do in moving to a place where we are comfortable to engage and connect no matter the subject.

Only 52% of our leaders feel comfortable talking about disability; this is despite continued mainstream exposure of the topic through the likes of AMV BBDO’s powerful work for Maltesers featuring four disabled actors and the amazing success of Channel 4’s The Last Leg and their ‘We’re the Superhumans’ Paralympic campaign. This score is a clear 20% lower than that for all managers across all industries.

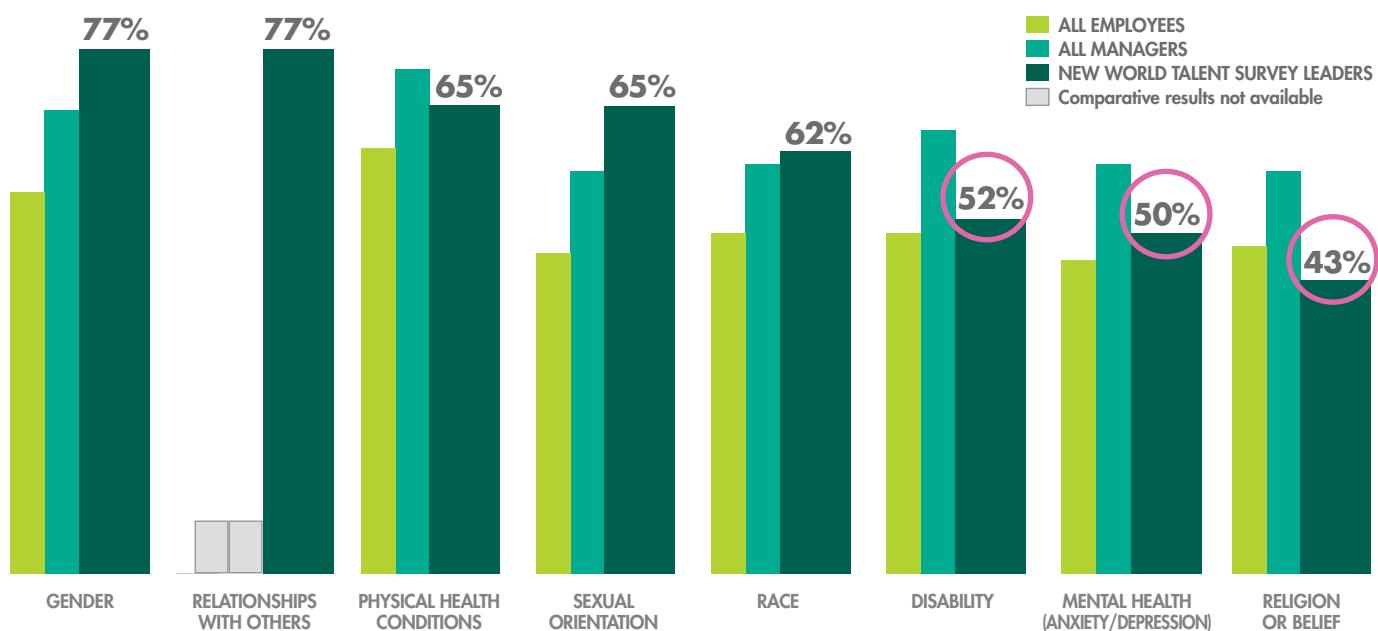
With religion and belief being very personal to the individual, the fact only 43% of our respondents feel comfortable talking about it at work may be to some degree understandable, yet this score remains 27% lower than that expressed by all people managers nationally.

However, as leaders we do have a clear duty of care for the mental health and performance of our employees – yet half of us still feel uncomfortable talking about this at work. We owe it to both ourselves and those we lead to try to crack this pervasive culture of silence around the topics of anxiety and depression to truly become a sector who utilise the growing understanding of the human mind to unlock the potential for future growth and success.

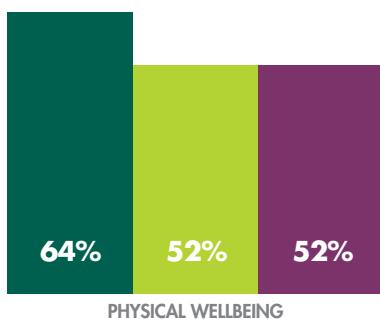
BENEATH THE MASK

From the thousands of conversations the Lighthouse conducts with leadership talent

Which of the following are you truly comfortable talking about at work?



Percentage rating wellbeing as excellent or good



every year, we fully understand the importance of sometimes being able to mask emotions and how one is really feeling in order to lead from the front. The ability to hide signs of things being amiss can be driven by the very same traits that keep senior executives at the top of their game, such as super-human stamina and resilience.

But just how much of this masking is deliberate and how much is unconscious? In The Psyched Index we asked our respondents to rate their own personal wellbeing alongside that of their leadership team and their wider organisation. The results were rather illuminating.

On average, 61% of leaders rated their overall wellbeing positively, with 43% rating their leadership teams the same way and 38% scoring their wider organisation positively. Overall, our leaders were 50% more likely to score their own personal wellbeing as excellent or good versus anyone else in the organisation.

This also played out across every individual element of the ‘whole self’. Whether relating to physical, mental, spiritual or emotional wellbeing, our respondents were more likely to score those furthest away from themselves in the organisation as being more challenged. It’s curious how leaders were able to identify emotional challenges in others, but not in themselves. We wonder if this ‘it’s you, not me’ stance reinforces the stigma for others and

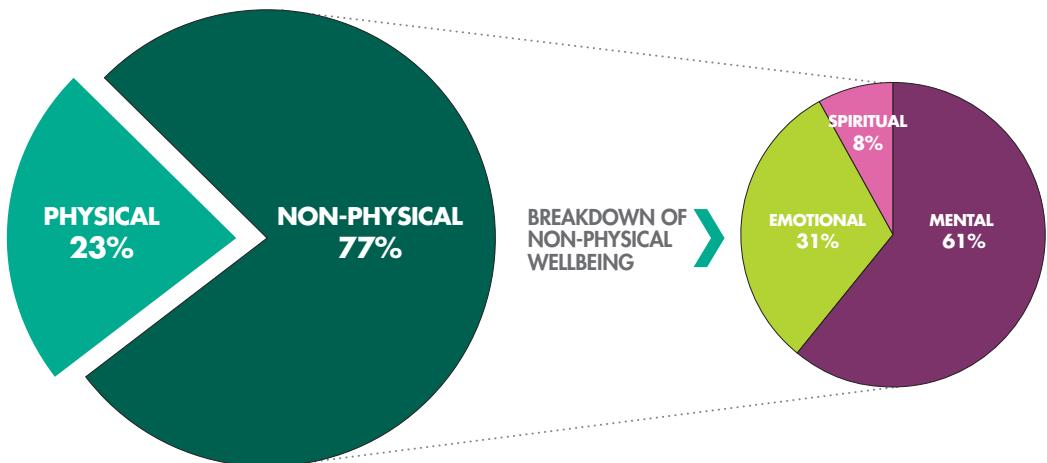


equally denies leaders the critical support they themselves may privately seek.

Across the years organisations have excelled in helping employees address their physical wellbeing through health checks, gym subsidies and the like, so perhaps it should come as no surprise that overall our leaders believe that there is the smallest gap between their own positive physicality and that of those in their workplace (a 19% difference between the leaders and their employees). Contrast this with the biggest perceived gap – mental health. 70% of leaders rated their own mental wellbeing as excellent/good, 52% ranked their leadership team this way while only 42% ranked their employees positively (a 60% difference between leaders and employees).

We feel there is a degree of masking evident in these results. As passionate advocates of positive wellbeing in every sense, we truly encourage you to stay open to the belief that in accepting and showing vulnerability yourself you allow others to open and explore in return.

If your organisation could provide you with support in one area of your wellbeing, which would it be?



performance is arguably more important than knowing what to do yourself. The good news is 95% of our leaders felt some level of responsibility towards the wellbeing of their teams. In reality The Psyched Index highlights an equal number of industry leaders (18%) don’t know how well their organisation supports employees with mental health problems, versus those who believe their organisation supports them very well (17%).

Despite 63% of our industry leaders believing that their organisations somewhat support those experiencing mental health issues, The Mental Health at Work Report counters that only 45% of people managers across all industries – those who are arguably closer to a broader range of employees – agree there is good support in place. Perception versus quantified reality highlights further disparity between intention and delivery.

THE TIME IS NOW

Last year’s New World Talent Survey concluded that leaders in the advertising, media and technology sector were ready to redress the balance of their cognitive and emotional selves. 80% of those that we surveyed were open to the idea of psychoeducation and therapeutic programmes to aid professional development – of these 25% had already had some form of therapy to develop themselves while another quarter were actively considering it.

This year The Psyched Index asked our leaders directly which area of personal wellbeing their organisations could provide them with support in. Almost 8 out of 10 of our respondents proactively chose support for the non-physical, with 61% of these opting specifically for help with their mental wellbeing.

Peak performance begins and ends with all parts of our being working to their full potential. While we still encounter workplace reticence when talking about mental wellbeing, there is no denying the conversation is getting louder, with ears more willing to listen and a clear desire for organisational support within our industry. The time is certainly now.

* Source: Mental Health at Work Report: 3,036 FT/PT UK employees, plus a parallel open public survey of 16,246 individuals, published October 2016

Transmissions from the Tower

WATCHTOWER VISIBILITY



GroupM (December 2016) forecasts 2017's global advertising expenditure to increase by 4.4% to \$547bn with digital accounting for a third of all spend and advertising budgets being sustained despite the group's concern over Trump and Brexit uncertainty.



Zenith (December 2016) also forecasts a 4.4% growth in 2017 global expenditure, in line with 2016. They currently anticipate 4.4% growth in 2018 and 4.1% growth in 2019 – marking a remarkably stable and consistent growth rate of between 4-5% since 2010.



Carat's latest global data from 59 different markets (September 2016) forecasts a 4% growth in global advertising expenditure in 2017. Digital remains the key growth driver for the year ahead, expected to expand at over three times faster than the rate for all media.



PwC's Global Entertainment & Media Outlook 2016-2020 (August 2016) points to a maturing media industry with slowing growth prospects. Yet despite this trend the sector remains extremely dynamic with pockets of growth scattered across the increasingly complex and competitive global market.



The IPA Bellwether Report (January 2017) witnessed UK marketing budgets continue to be revised upwards toward the end of 2016. However, 2017 will prove more challenging with advertising spend expected to decline by 0.7% before growing the same amount in 2018.



Credos, part of the Advertising Association, stated less than 25% of ad agencies believe Brexit will drive international growth, with 22% of businesses citing lost business or contracts as a direct result of the referendum (January 2017).

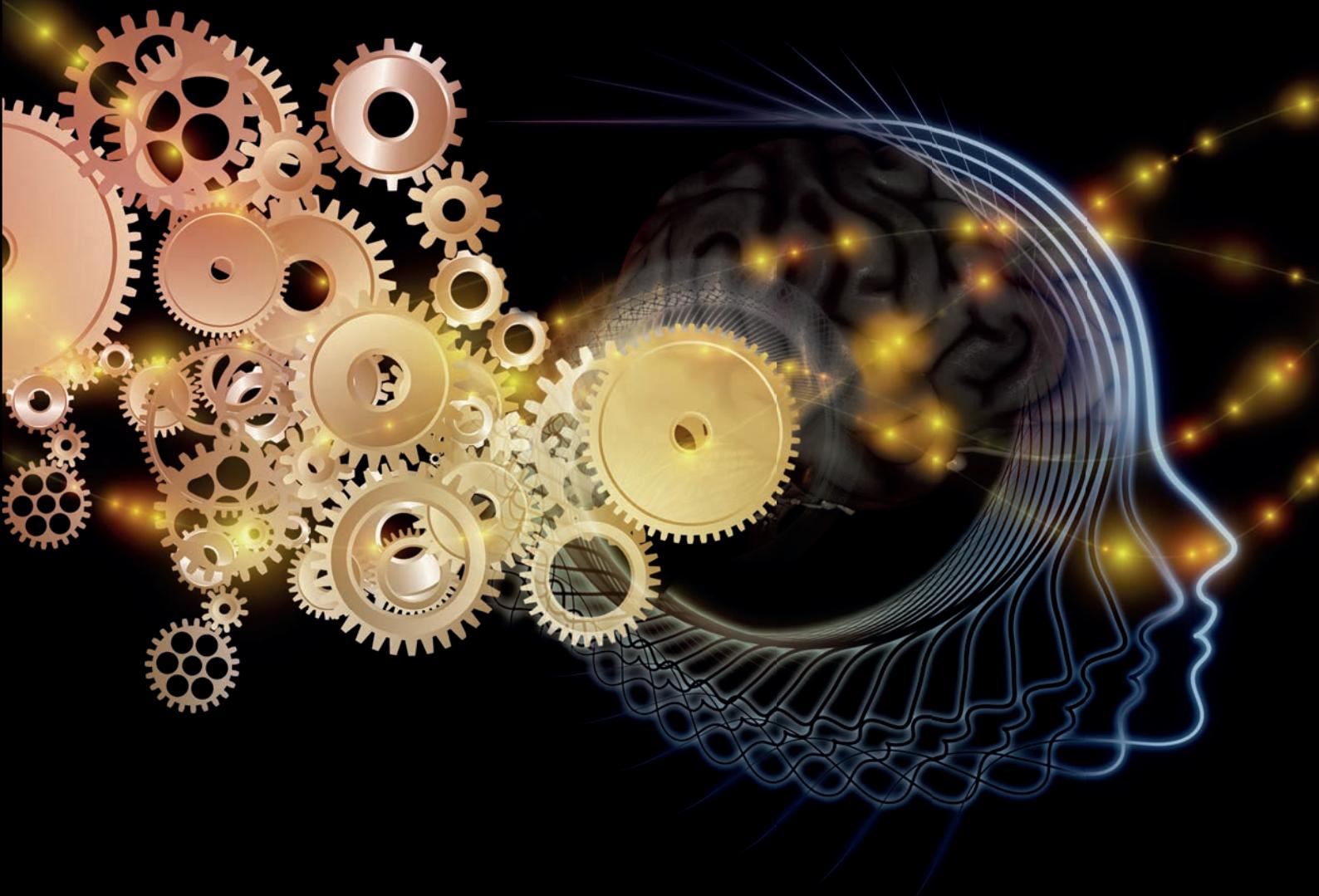
ROCKING THE BOAT

The following thoughts represent opinions and forecasts directly from the Lighthouse and are not based on any specific New World Talent Survey findings.

- **TESTING TECH:** 2017 will be a year of reckoning for many of our industry's ad tech firms with several high profile casualties.
- **CONTENT CHAMPIONS:** The content studios of media owners will begin shooting big ticket productions, perhaps even being nominated for a BAFTA or a Golden Globe.
- **TALENT TRANSFERS:** Creative agencies will finally welcome senior leadership talent from the media and technology sectors to cement their future.
- **BILLBOARDS BOUGHT:** At least one of the UK's outdoor companies will be sold or consolidated with a competitor.
- **PEOPLE POWER:** A leading agency network will buy a talent management firm to address challenges around acquisition and retention of senior leaders.
- **IN-HOUSE INDUSTRY:** A major retailer will bring all of its media and creative agency requirements in-house.
- **POLITICAL PRESENCE:** Two high-profile female figures from our sector will make a foray into the world of politics.
- **TRADING TELLY:** ITV's station price will cease to be the trading mechanic for the UK's television industry.
- **MASSIVE MERGERS:** Two leading magazine publishing houses will consolidate to form a super group.
- **TALKING TWITTER:** Anything could happen... something needs to happen.
- **CHANNEL CHANGES:** At least one of the four major commercial television companies will change their CEO by the end of the year.
- **FINANCIAL FAUX PAS:** One of the major media networks will be formally investigated for financial irregularities.
- **GROWING GOOGLE:** The technology giant will expand its marketing services offering by acquiring an agency group.
- **TYPICAL TRUMP:** In attempting to discredit the news organisations he believed rallied against him, President Trump's antics will fuel headlines, traffic and ultimately the profitability of the very beast he tried to slay.

To download all charts from 2017's survey, please visit thelighthousecompany.com/NWTS

“ IF I ASKED YOU TO NAME
ALL THE THINGS YOU LOVE...
HOW LONG WOULD IT TAKE
FOR YOU TO NAME YOURSELF? ”




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Circus House
26 Little Portland Street
London
W1W 8BX

131 West 33rd Street
Suite 800
New York
NY 10001

thelighthousecompany.com

 @shippingreport
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