

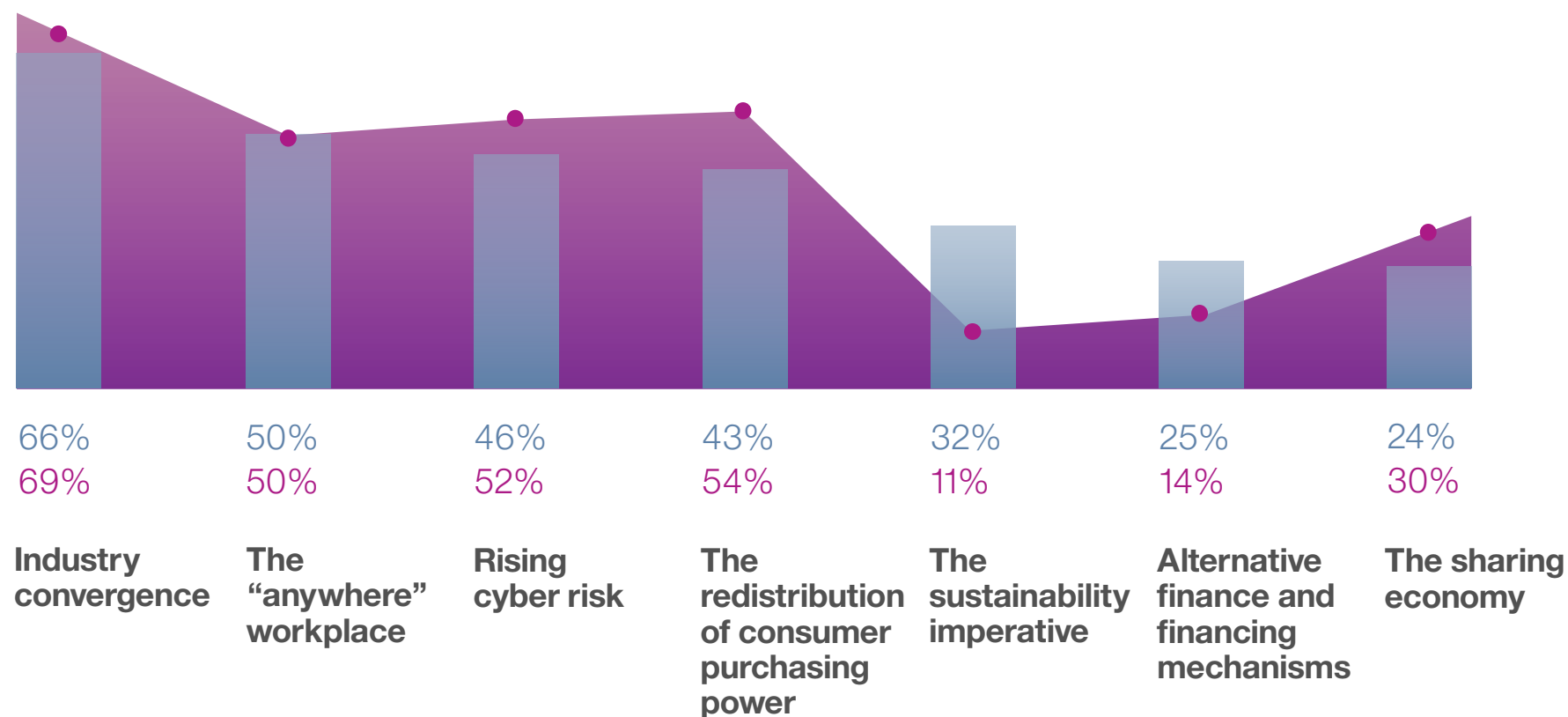
REDEFINING BOUNDARIES

Insights from the Global C-suite Study

Media and Entertainment Industry

We surveyed 200 top executives from the Media and Entertainment (M&E) industry for our latest C-suite Study. So how do they differ from CxOs in other sectors?

Figure 1. M&E CxOs say a broad range of trends is changing business



Convergence and consumer clout

M&E CxOs agree with other CxOs that the biggest trend reshaping the business arena is industry convergence. But they think the shift in consumer purchasing power will also have a major impact, as the economic balance alters and the global middle class grows (see Figure 1).

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Media and Entertainment – Industry Point of View

M&E CxOs are excited by the new opportunities this offers, but they're concerned about outsiders invading their patch. That said, they're more relaxed about competition from other industries than they were two years ago, when we conducted our previous C-suite Study (see Figure 2).

Twin forces

What external influences are driving these changes? M&E CxOs point to a potential mix of technological progress and market forces and they view both as more powerful than other CxOs do. They're also more worried about the scarcity of people skills (see Figure 3).

Figure 2. M&E CxOs are more relaxed about rivals from "left-field"

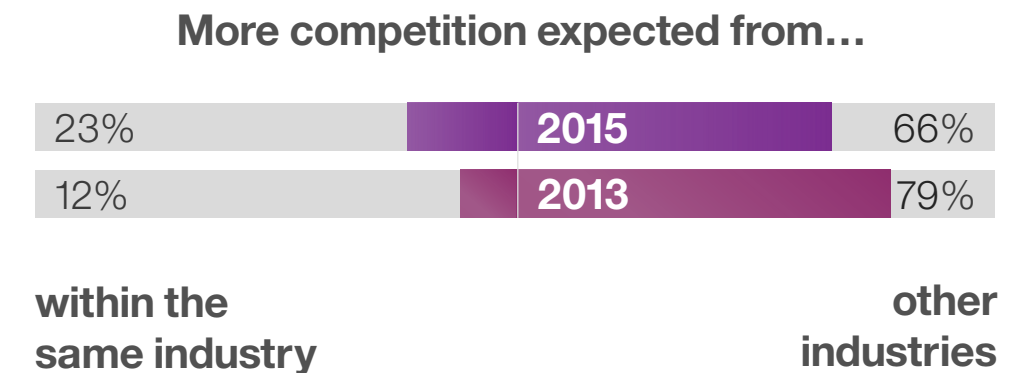
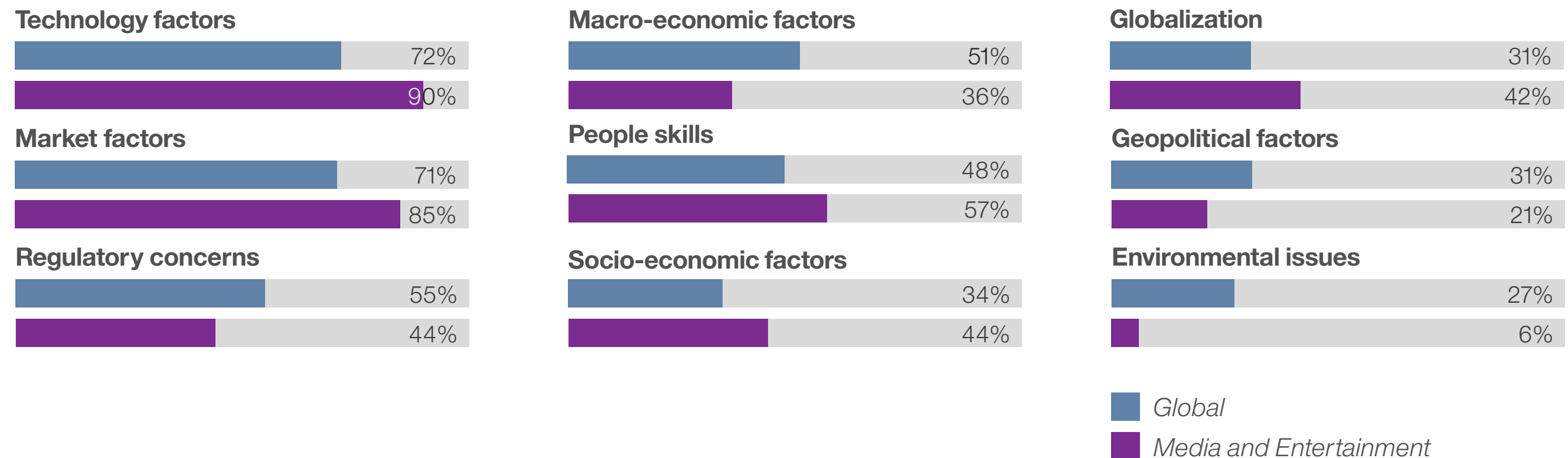


Figure 3. M&E CxOs say technology is the main game changer



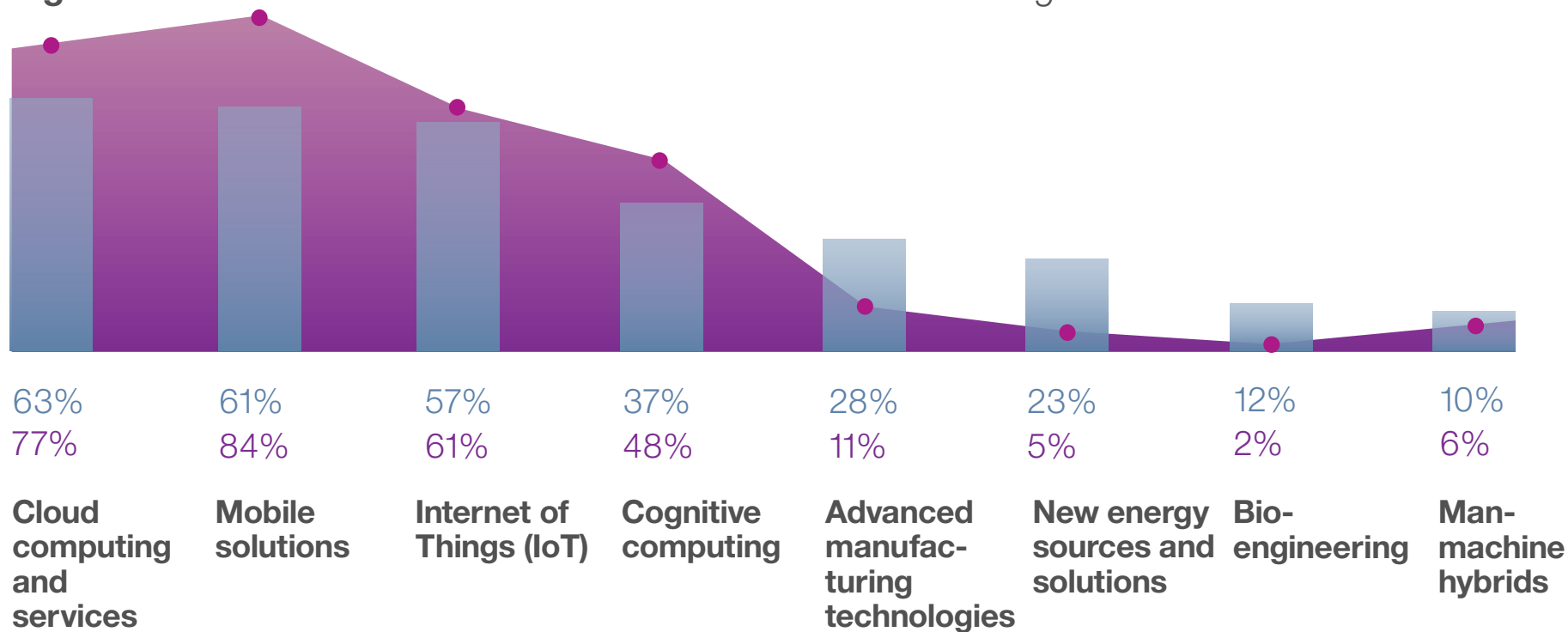
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Tech transformers

M&E CxOs are betting even more heavily on cloud and mobile solutions than other CxOs. They're also more bullish about the Internet of Things and cognitive computing (see Figure 4). However, new technologies bring new threats. M&E CxOs are especially nervous about potential intellectual-property losses – although, like the CxOs in our overall sample, they see IT security as the top risk.

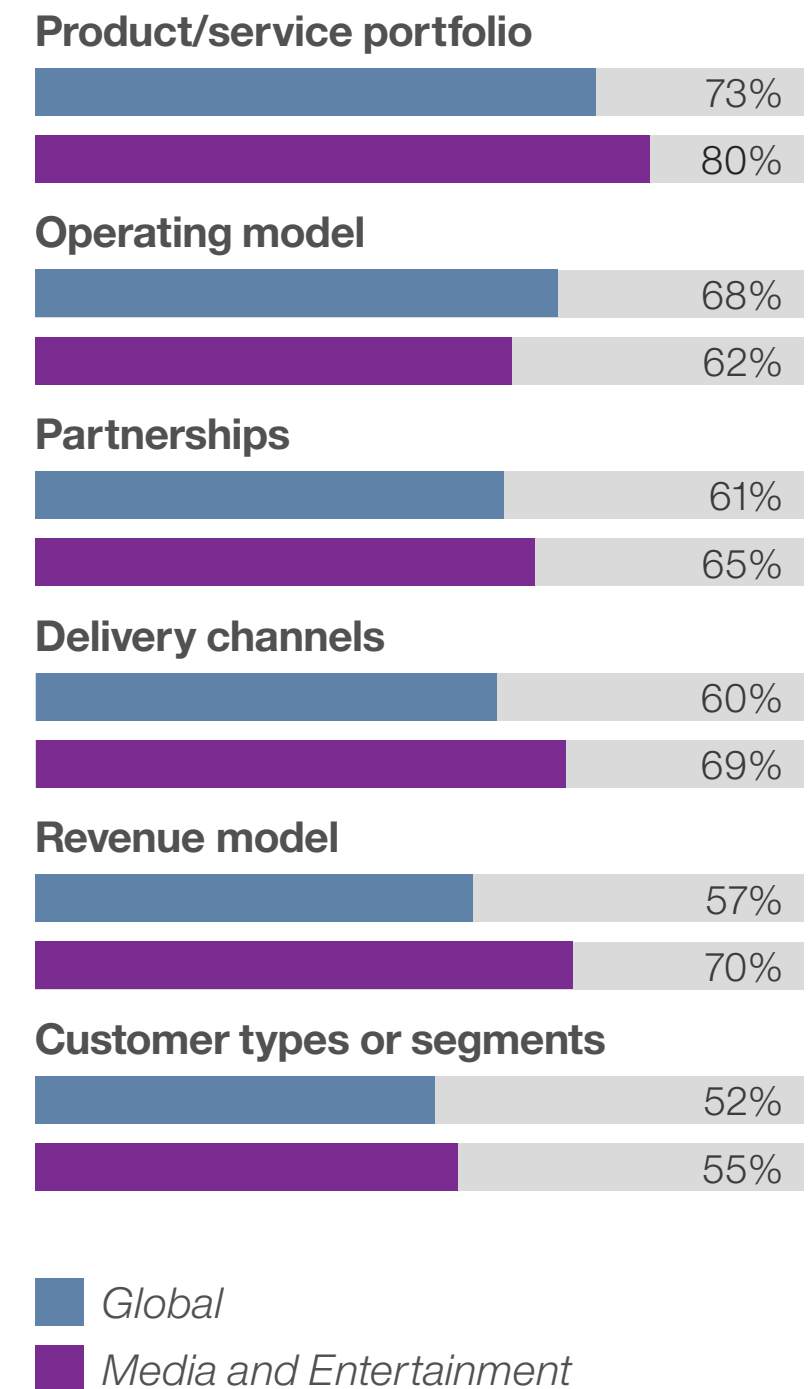
Figure 4. M&E CxOs are even more switched on to new technologies



Open for business

Yet, in some respects, M&E CxOs are better placed to cope with disruption than CxOs in other sectors. We identified a small group of highly successful enterprises in our overall sample. Torchbearers, as we call them, possess several distinctive traits. Among other things, they're particularly concerned with improving the way they go to market. M&E CxOs are, likewise, exceptionally intent on reviewing their revenue models and delivery channels (see Figure 5).

Figure 5. M&E CxOs put more effort into improving their revenue models and delivery channels



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Media and Entertainment – Industry Point of View

But there are two key areas where M&E CxOs trail behind our exemplars. They pay less attention to customer feedback when they're trying to predict new trends. And they're not as bold as Torchbearers, when it comes to being market pioneers (see Figure 6).

Figure 6. Torchbearers are better at listening to customers and pioneering new offerings



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