

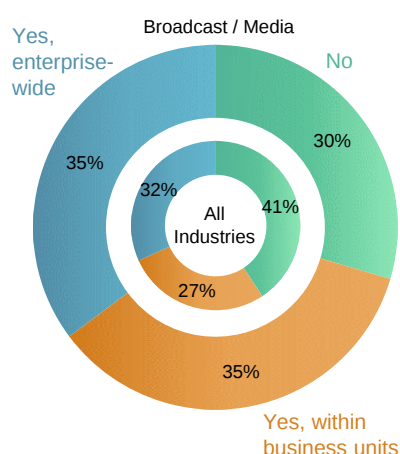


The Harvey Nash/KPMG CIO Survey is the largest IT leadership study in the world, with almost 4,000 respondents across 84 countries, representing over US\$300bn of IT budget spend.

This Broadcast/Media industry snapshot provides survey responses from 85 IT leaders on some of the key topics, and highlights several areas where this industry's responses differed significantly from those across all industries.

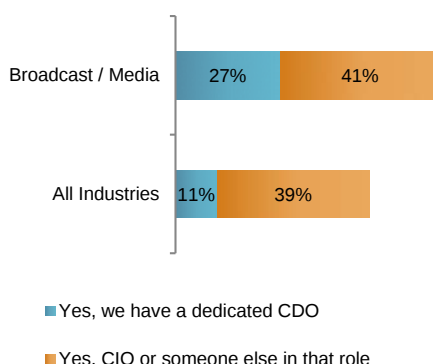
Digital Strategy

Does your organization have a clear digital business vision and strategy?



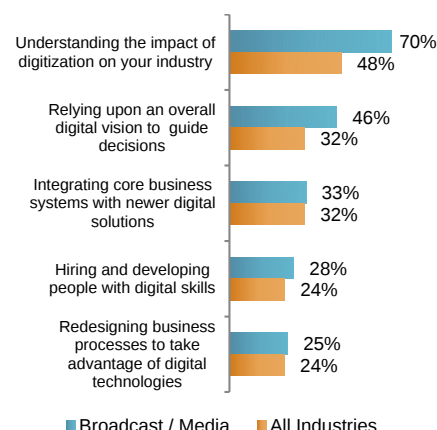
Broadcast/Media companies are **more likely to maintain a clear digital business strategy** than other companies, either enterprise-wide (35% vs. 32% for all industries), or within business units (35% vs. 27%). However, 30% lack a clear strategy of any sort.

Does your organization have a Chief Digital Officer or someone serving in that capacity?



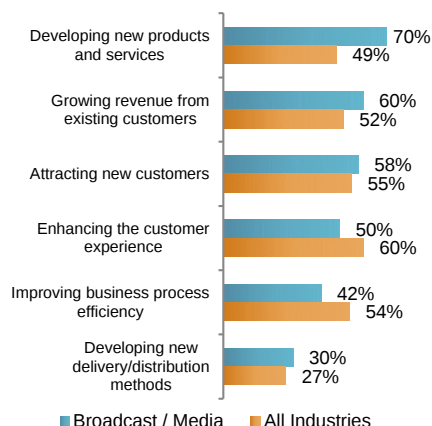
27% of Broadcast/Media companies have a dedicated Chief Digital Officer, far more than in other industries. An additional 41% have the CIO or someone else act in that role. In total, more than two-thirds have a single executive in charge of their digital strategies.

How effective is your organization at each of the following capabilities? (Very/Extremely Effective)



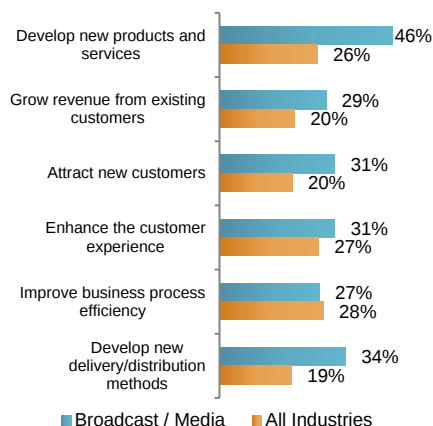
Broadcast/Media effectiveness in key digital capabilities exceeds peers in other industries. In particular, Broadcast/Media companies **excel at understanding the impact of digitization** (70% vs. 48% for all industries). However, they **struggle with redesigning business processes to take advantage of digital**.

Which are the most important goals when prioritizing digital technology initiatives in your organization?



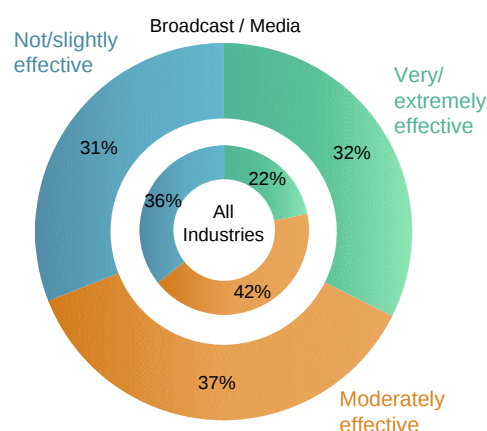
When prioritizing digital investments, Broadcast/Media companies **most heavily focus on developing new products and services** (70% vs. 49% for all industries) and **growing revenue from existing customers** (60% vs. 52%).

How effective has your organization been in using digital technologies to advance the following goals? (Very/Extremely Effective)



Reflecting its importance, **46% of Broadcast/Media companies rate themselves as very effective or better at using digital to grow revenue from existing customers**. They are much less effective at using digital to grow revenue from existing customers (29%).

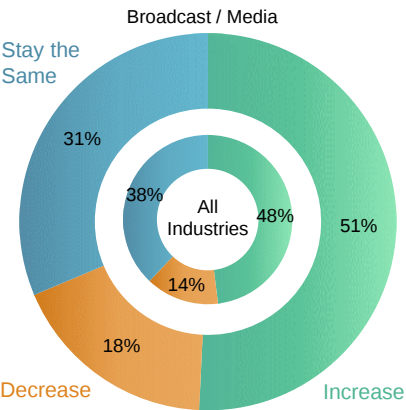
Overall, how effective has your organization been in using digital technologies to advance its business strategy?



While Broadcast/Media companies **report higher overall effectiveness levels in their digital strategies** than other industries, just 32% describe their digital strategy as at least very effective, roughly equal to those describing it as slightly effective or worse.

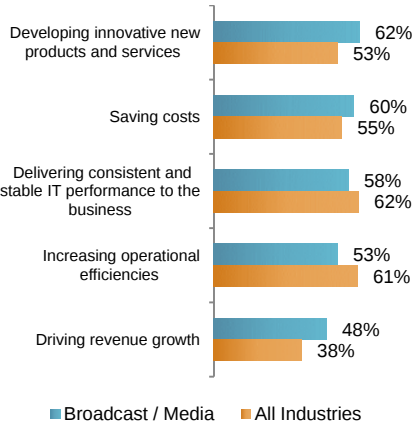
Budget/Priorities

Looking forward, over the next 12 months, what do you expect your IT budget to do?



Broadcast/Media companies are **somewhat more optimistic about their IT budgets for next year** than companies in other industries, with 51% expecting an increase in their IT budgets, compared to an all-industries average of 48%.

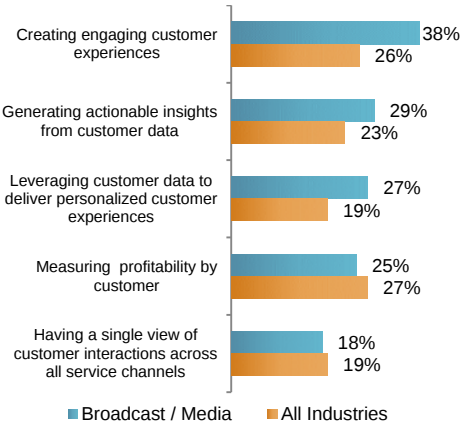
What are the key business issues that your management Board are looking for IT to address? (top 5)



Compared to other industries, Broadcast/Media management Boards **more heavily emphasize IT developing new products and services** (62% vs. 53% for all industries), **but also focus heavily on saving costs** (60% vs. 55%).

Customer Capabilities

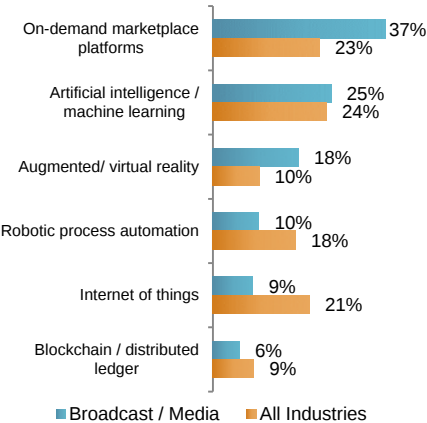
How effective is your organization at each of the following capabilities? (Very/Extremely Effective)



Broadcast/Media **exceeds most cross-industry benchmarks in its effectiveness in five critical customer-focused capabilities**, especially in creating engaging customer experiences (38% vs. 26%). However, Broadcast/Media companies struggle with having a single view of customer interactions across all service channels (18% vs. 19%).

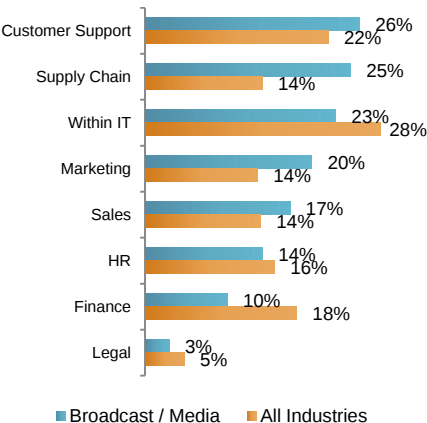
Technology & Innovation

How would you characterize your investment in the following technologies? (Moderate/Significant Investment)



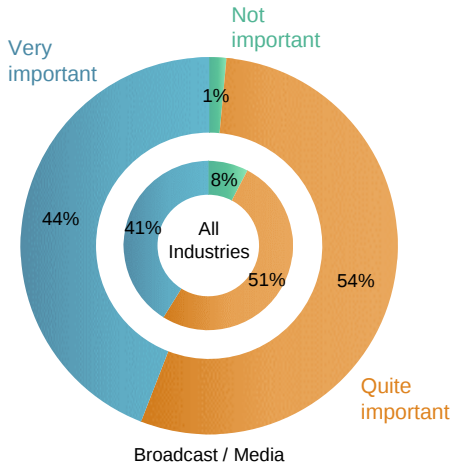
Of next-generation technologies, Broadcast/Media companies are **most likely to have invested in on-demand marketplace platforms** (37% vs. 23% for all industries) and **A.I./machine learning** (25% vs. 24%).

In which functions have you implemented digital labor / automation?



More so than other industries, Broadcast/Media has **heavily focused its digital labor/automation efforts within Customer Support** (26% vs. 22%) and **Supply Chain** (25% vs. 14%).

How important is it to have an innovative, experimental culture in your organization to ensure its digital strategy is a success?



Broadcast/Media companies **view having an innovative, experimental culture as an even more critical component of the success of their digital strategies** than others, with 44% viewing it as very important and 54% as quite important.

Conclusion

Given the amount of disruption experienced by the sector, unsurprisingly, digitization is seen as the key for growth for Media businesses. These businesses are more likely to have a clear digital strategy and a dedicated Chief Digital Officer than any other sector. As consumer consumption patterns are constantly shifting with the introduction of new mediums and platforms, media companies are placing a greater emphasis on new products and services when prioritising digital investments.

Media companies are driven to innovate continuously in order to remain competitive and identify new revenue streams in a dynamic industry. CIOs are investing more in on-demand marketplace platforms and AI/machine learning, reflecting the accelerated pace of change and a desire to be agile in terms of their product and content offerings. There is concern around achieving ROI on digital capabilities and revenue growth remains a key challenge. This reflects wider industry challenges.

Further information

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