



Building an Adaptable Digital-first Foundation in Media and Entertainment

With the velocity of content and rapid expansion of digital channels, the future of media and entertainment requires digital infrastructure to support the adaptability and connectivity that will drive business and operational agility.

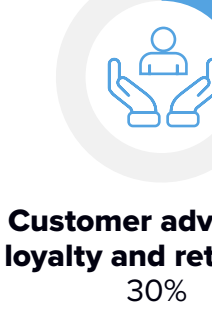
Digital Transformation Yields Real Benefits

Media and entertainment organizations must adapt to deliver customized premiere content quickly and seamlessly to meet digital-first consumer demands.

AMONG MEDIA ORGANIZATIONS:

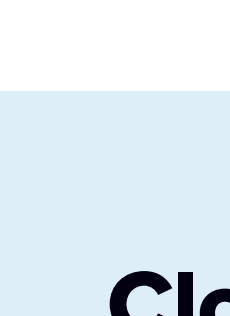


59% have a formal strategy for business resiliency and are beginning to accelerate and integrate digitalization.

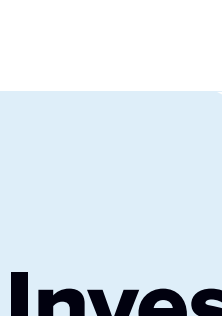


84% say DX efforts have begun to show positive impact on the top and/or bottom line since implementation.

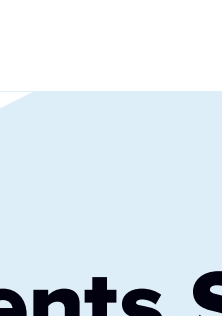
TOP BENEFITS ACHIEVED FROM DX INVESTMENT



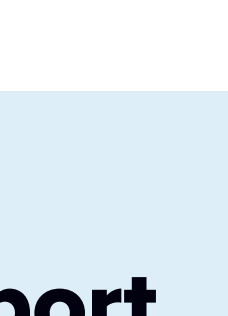
Improved production times
38%



Organizational agility
34%



Customer advocacy, loyalty and retention
30%



Revenue generation from new products/services
30%

Source: Future Enterprise Resiliency and Spending Survey - Wave 9, IDC, October 2021

Cloud Investments Support Seamless, Secure DX

Media and entertainment organizations are putting a focus on cloud to enable remote production and deliver optimized digital experiences for consumers to consume content however and wherever they want.

TOP TRIGGERS DRIVING MEDIA AND ENTERTAINMENT COMPANIES TO MOVE TO CLOUD



Supporting digital transformation initiatives
38%

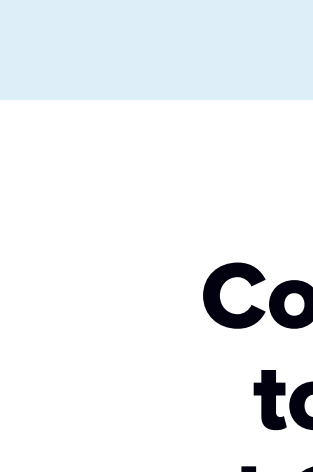


Company and customer data has grown beyond capacity of existing systems
36%



Keeping up with internal and external security and privacy compliance across regions
34%

Source: CloudPath Survey, IDC, May 2021



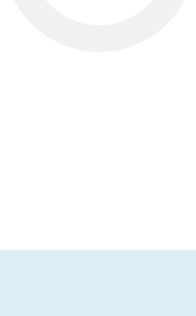
88% of media and entertainment companies say the top driver for shifting to public cloud services for storage and data management is the growth of networked edge computing locations, and related increase in data volumes.

Source: Future Enterprise Resiliency and Spending Survey - Wave 10, IDC, October 2021

Connectivity Is Critical to Hybrid Workforce and Operational Resiliency

Media and entertainment organizations recognize the importance of a robust digital infrastructure to help improve the customer experience, better enable content creation and delivery anywhere, and create tighter data linkages across channels.

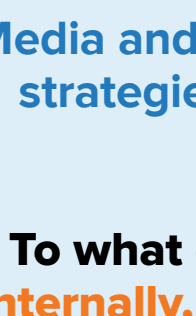
Q. Looking ahead over the next 12 months and beyond, how will your organization prioritize connectivity-related investments to improve agility?



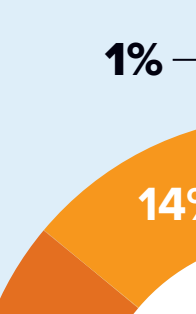
Customer Agility
Customer-focused connectivity investments to improve the customer experience (e.g., augmented reality/virtual reality, video interaction and content)



Business Agility
Internal IT investments in connectivity to improve business efficiency and performance (e.g., 5G networks and devices, SD-WAN, etc.)



Operational Agility
Employee-focused connectivity related investments to drive productivity (e.g., unified communications, remote work connectivity, or cloud-connected applications)



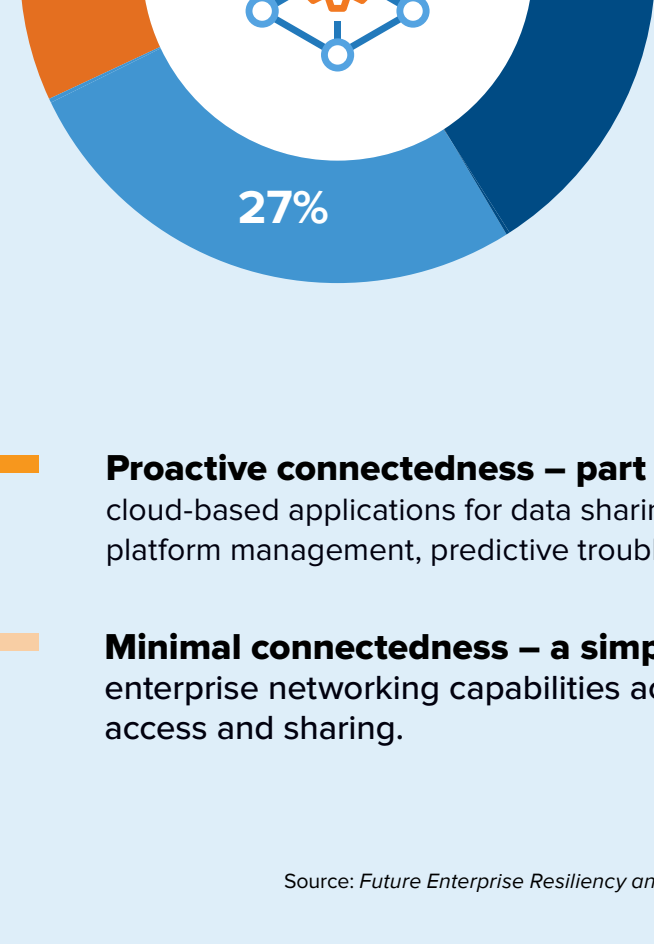
Partner/Value Chain Agility
Partner and supply chain-focused IT investments to improve partner communications across your business ecosystem (e.g., partner onboarding, partner management, or cloud-based contract management)

Source: Future Enterprise Resiliency and Spending Survey - Wave 10, IDC, October 2021

Connectivity Essential for DX Strategies to Help Businesses Be Adaptable

Media and entertainment companies need to take connectivity strategies from reactive to proactive across the enterprise.

Q. To what extent would you say your organization is connected internally, including across divisions and geographic regions?



- Reactive connectedness – automated capabilities.** Integrated tools for data sharing, secure employee connectivity, automated orchestration and administration for troubleshooting, all governed by centralized processes.
- Limited connectedness – some consolidated capabilities.** Some enterprise networking tools for connectivity across teams, basic applications for data sharing between remote workers.
- Extensive – intelligent and self-aware.** Heavily cloud-enabled IT applications, centralized and open data model, extensive data sharing, AI/ML for real-time business decisions.

- Proactive connectedness – part of the enterprise fabric.** Pervasive use of cloud-based applications for data sharing, remote working, remote employee device and platform management, predictive troubleshooting governed by centralized processes.
- Minimal connectedness – a simple utility.** Lack of consistent and/or integrated enterprise networking capabilities across regions or offices, minimal cross-data access and sharing.

Source: Future Enterprise Resiliency and Spending Survey - Wave 10, IDC, October 2021

IT Budgets Prioritize the Connected Enterprise

Media and entertainment businesses rely on robust network architecture, mobility and data to achieve visibility and flexibility.

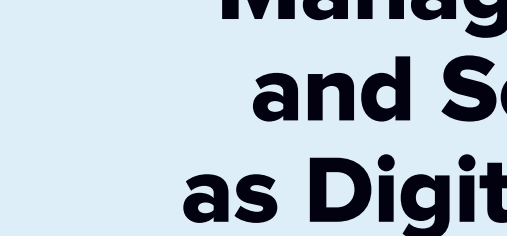
TOP AREAS MEDIA AND ENTERTAINMENT COMPANIES PLAN TO INCREASE SPENDING



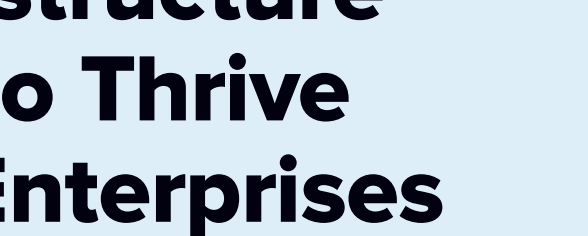
34% Fixed data connectivity



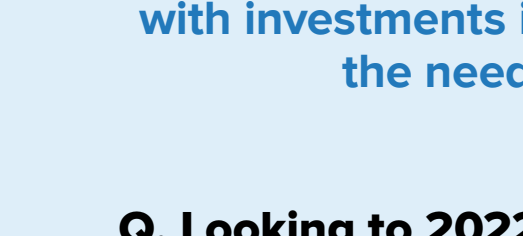
32% IoT projects (remote monitoring, connected machines, etc.)



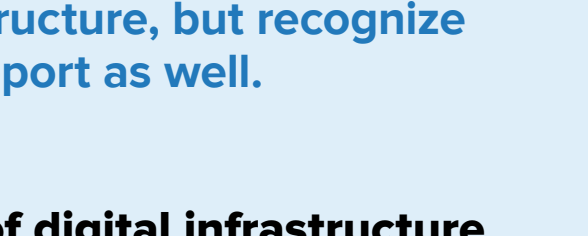
30% Mobile/remote worker productivity tools



29% Data analytics and business intelligence applications



29% 4G/5G wireless/cellular connectivity services



27% Mobile apps (customer- and employee-facing)

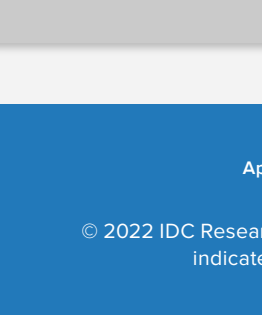
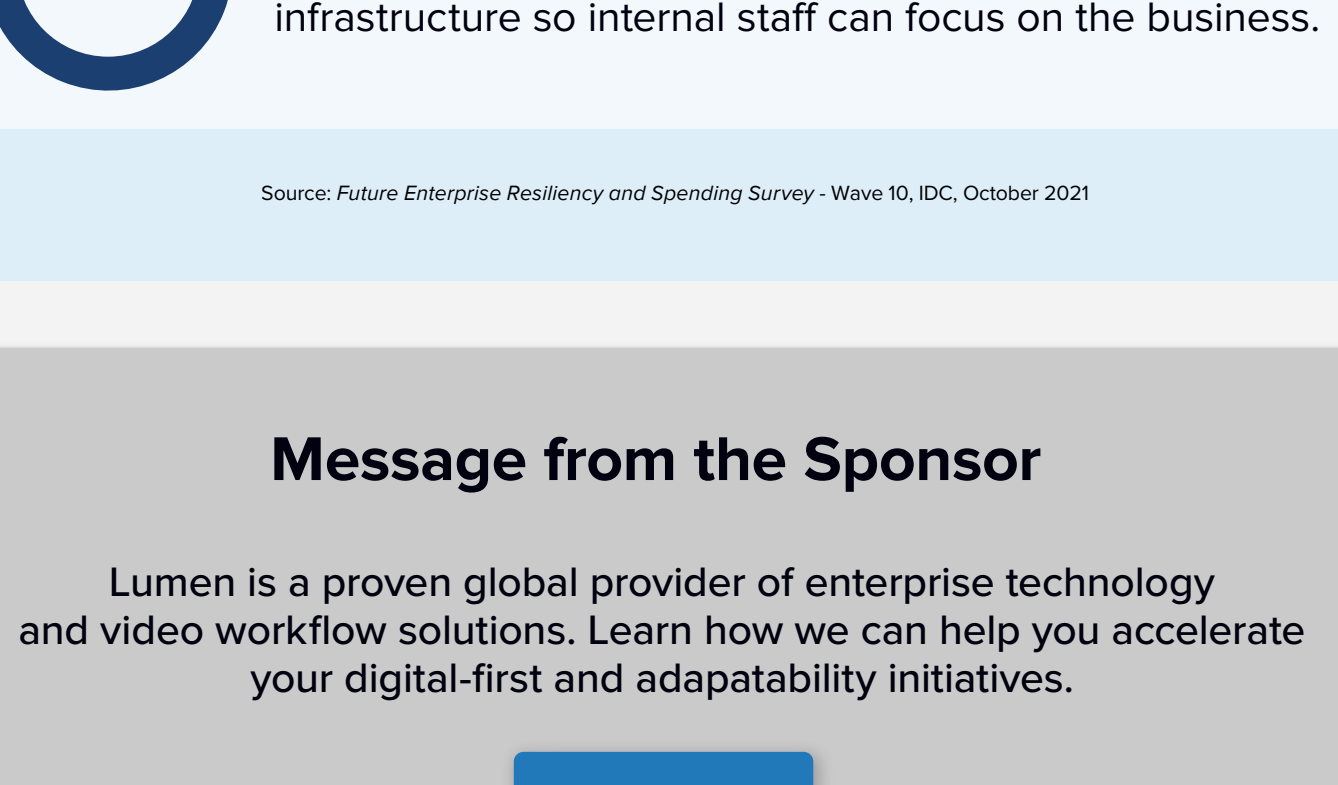
Source: Future Enterprise Resiliency and Spending Survey - Wave 9, IDC, October 2021

Media and Entertainment Organizations Invest in Managed Infrastructure and Services to Thrive as Digital-first Enterprises

IDC research indicates that digital leaders align their success with investments in robust infrastructure, but recognize the need for partner support as well.

Q. Looking to 2022, which types of digital infrastructure investments do you expect will provide the greatest strategic advantage to your organization's digital business success?

(% of respondents)



81% of media companies want strategic vendors to take more day-to-day administrative and operational responsibility for infrastructure so internal staff can focus on the business.

Source: Future Enterprise Resiliency and Spending Survey - Wave 10, IDC, October 2021

Message from the Sponsor

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