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19th Annual Global CEO Survey

Redefining business success in a changing world

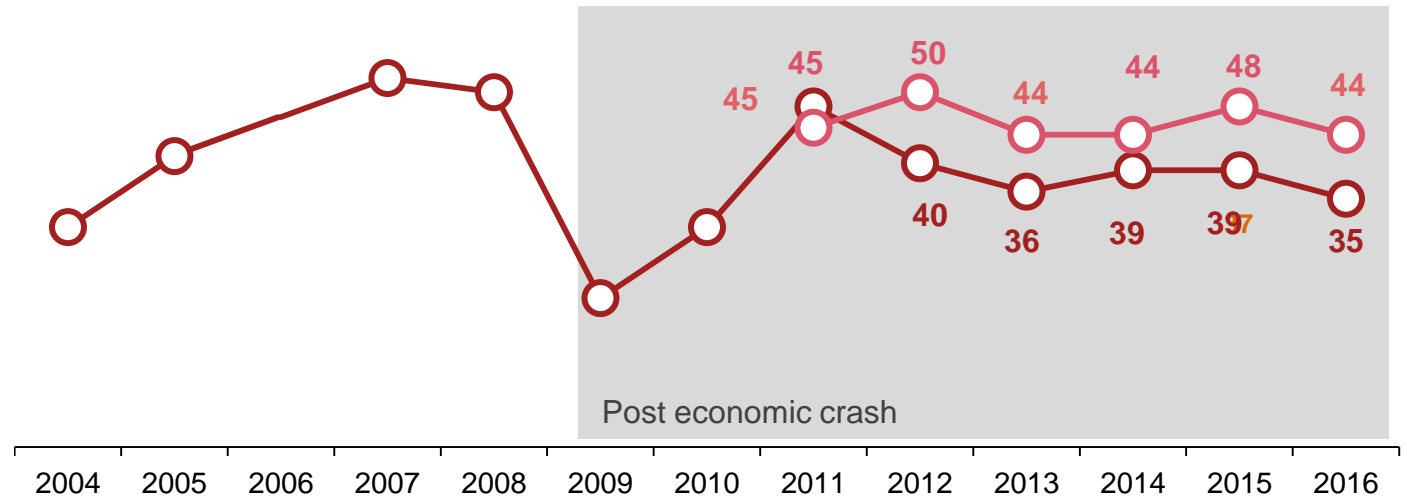
Communications sector key findings

February 2016



Growth confidence check

44% of Communications CEOs are “very confident” in prospects for revenue growth in the next 12 months—10% higher than the total global average.



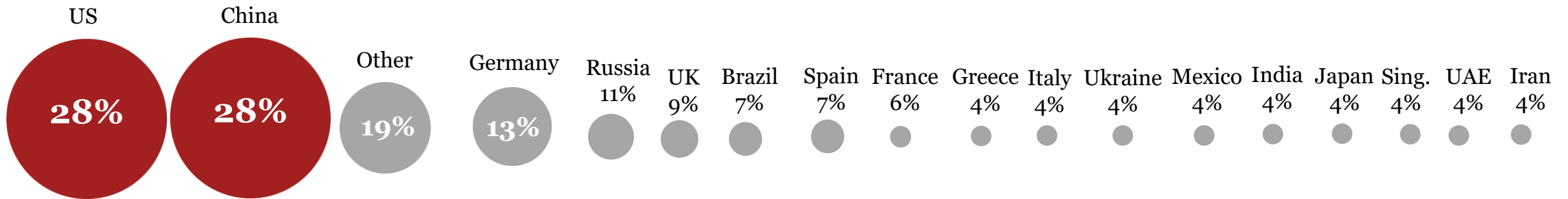
Q: How confident are you about your company’s prospects for revenue growth over the next 12 months? Yearly comparison.

- All Global CEOs very confident in business growth prospects
- Communications CEOs very confident in business growth prospects

Top growth markets for Communications CEOs

USA and China are the most important overseas markets for growth, but a long list of smaller markets also commands attention

2016

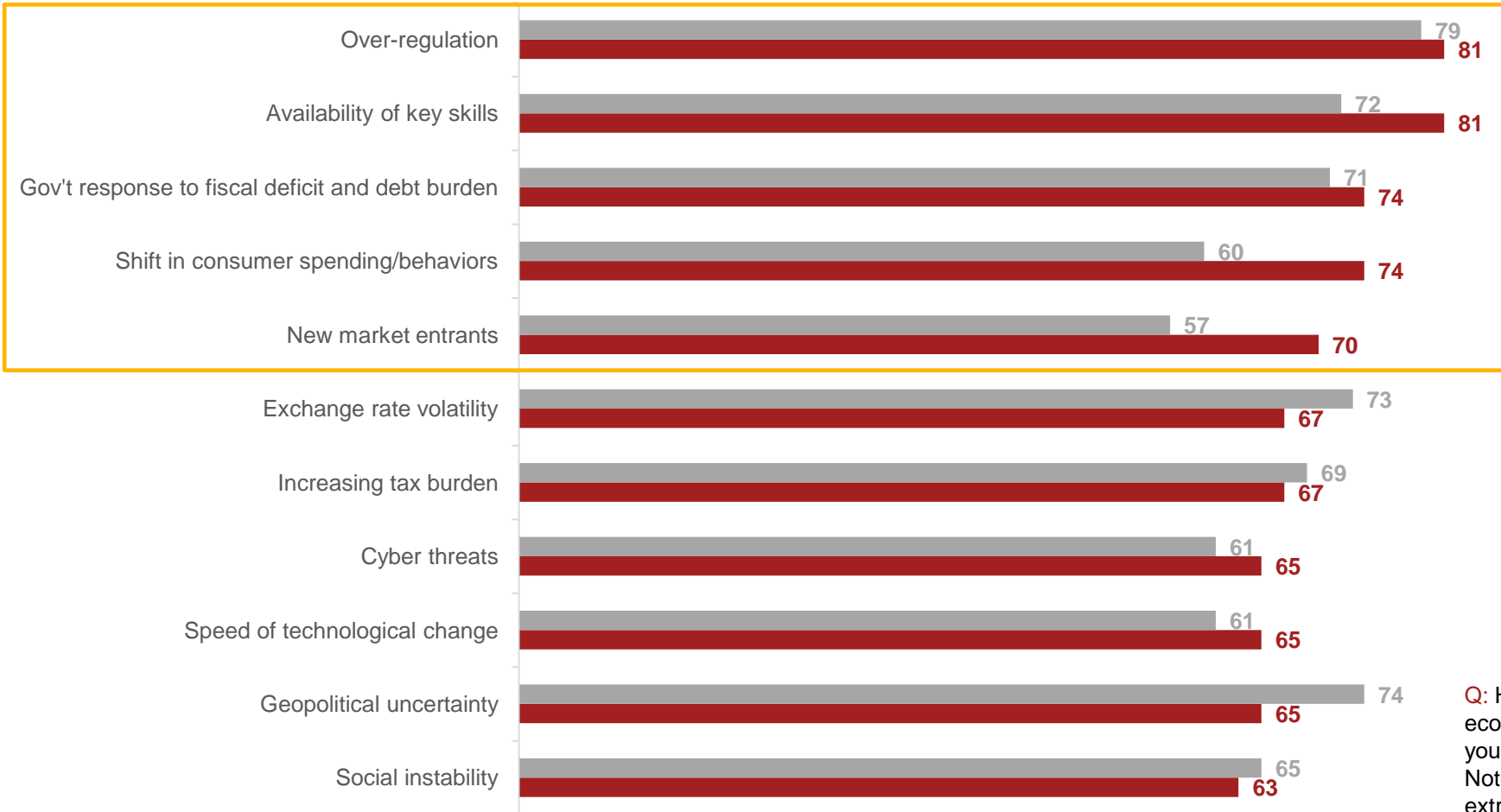


Q: Which three countries, excluding the one in which you are based, do you consider most important for your overall growth prospects over the next 12 months?

A wide range of threats reflect the ways Communications companies aim to grow



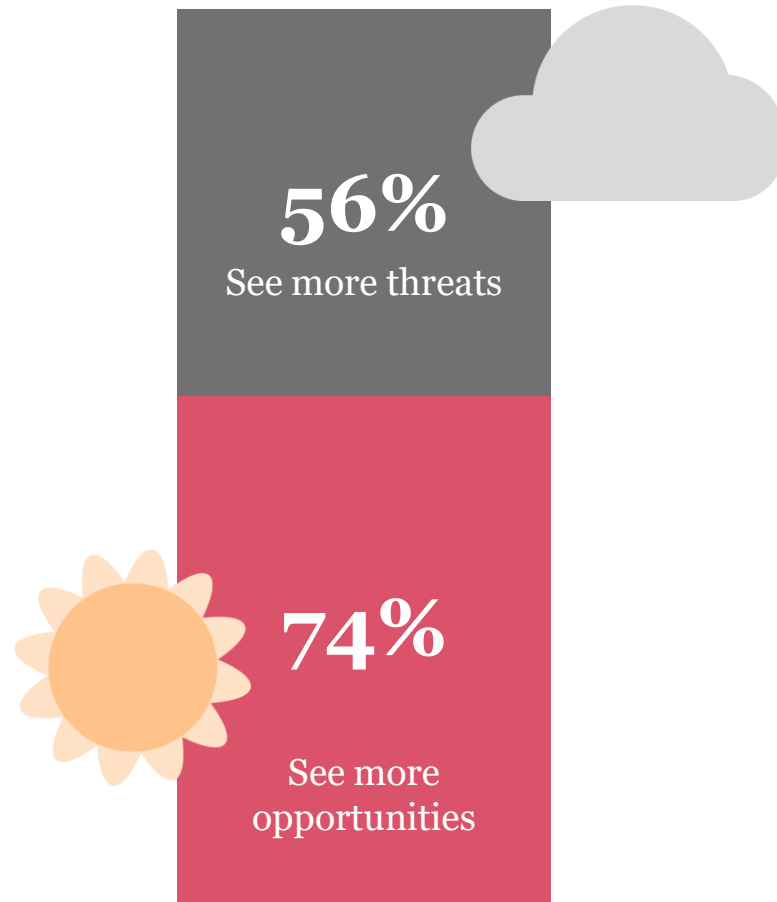
Key threats



Q: How concerned are you about the following potential economic, policy, social, environmental and business threats to your organisation's growth prospects?

Note: Respondents who answered somewhat concerned or extremely concerned

Threats and opportunities



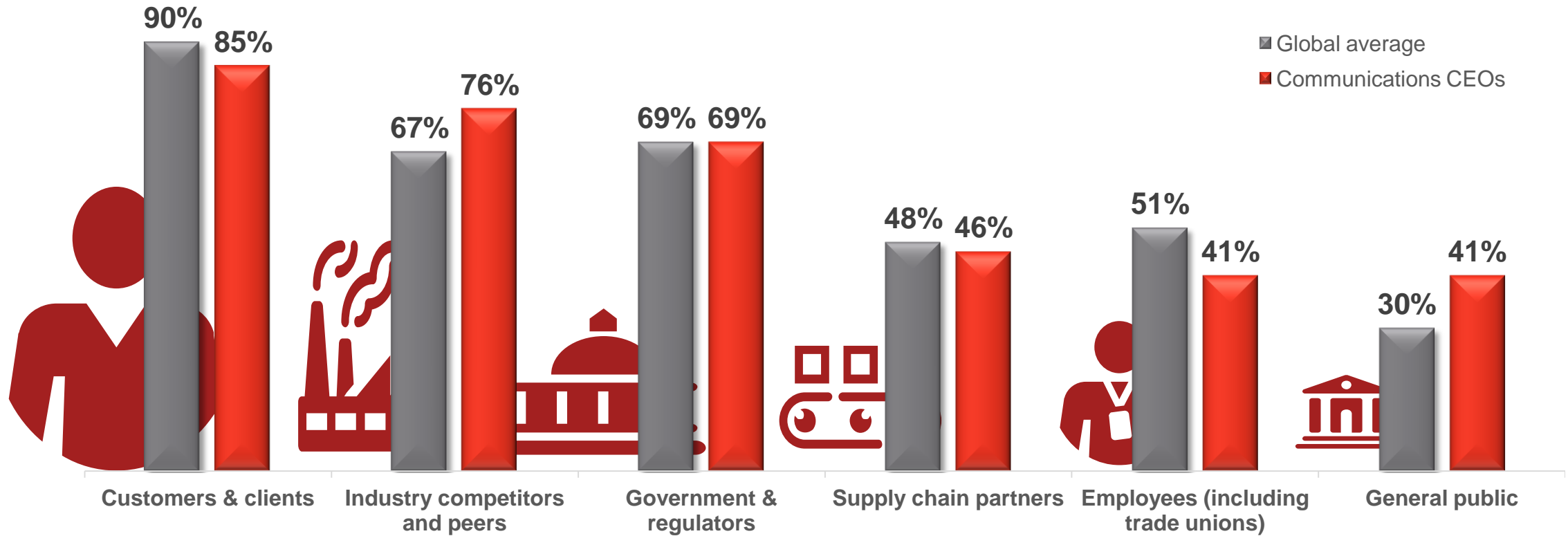
56% of Communications CEOs see more threats to their business than they did three years ago, while 74% see more opportunities.

Q: To what extent do you agree/disagree that there are more growth opportunities/threats for your company than there were three years ago?

Note: Respondents who agreed/strongly agreed

Stakeholder impact on business strategy

Customers and clients are top priority for Communications CEOs, followed by industry competitors and peers.



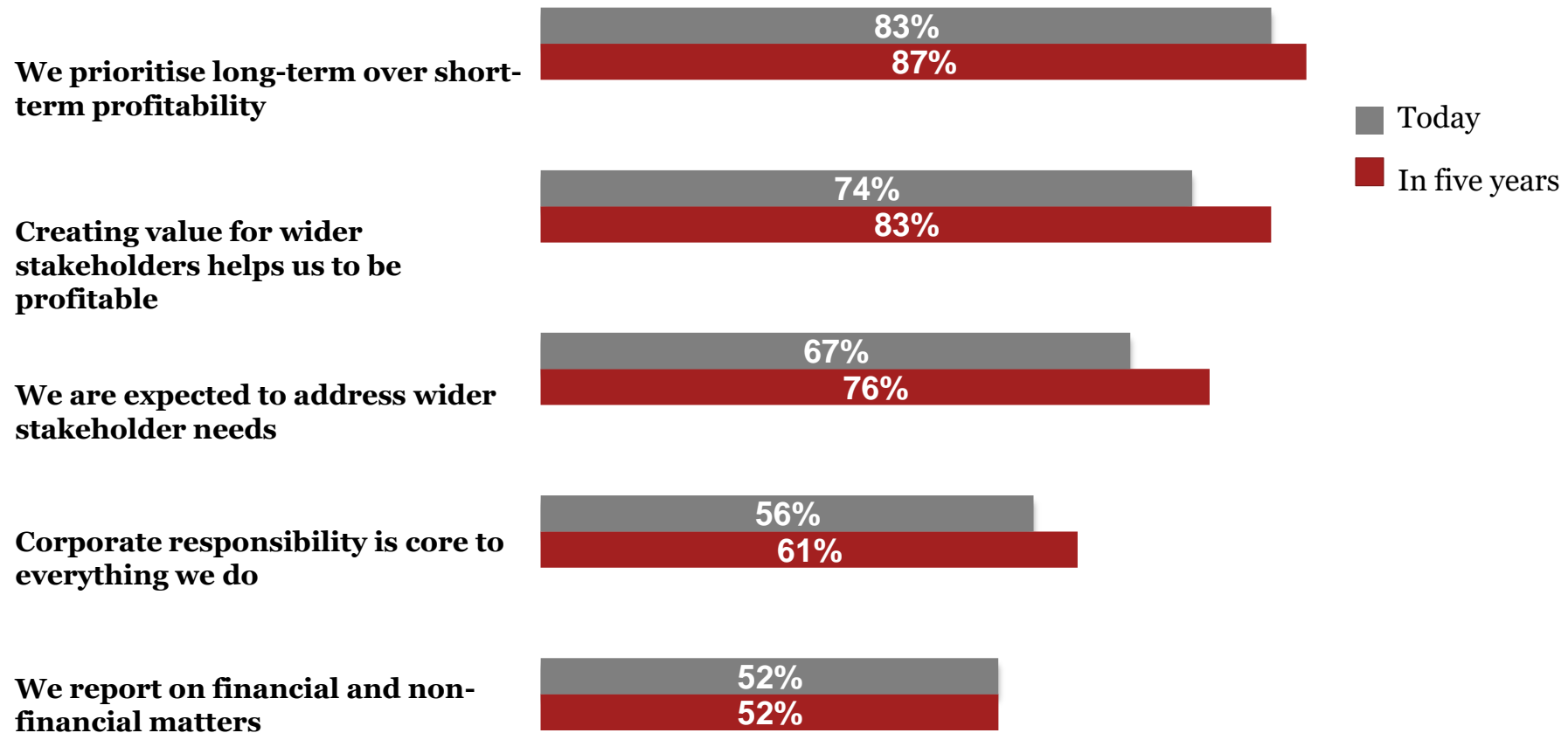
Q: What impact do the following wider stakeholder groups have on your organisation's strategy?

Note: Respondents who indicated high or very high impact
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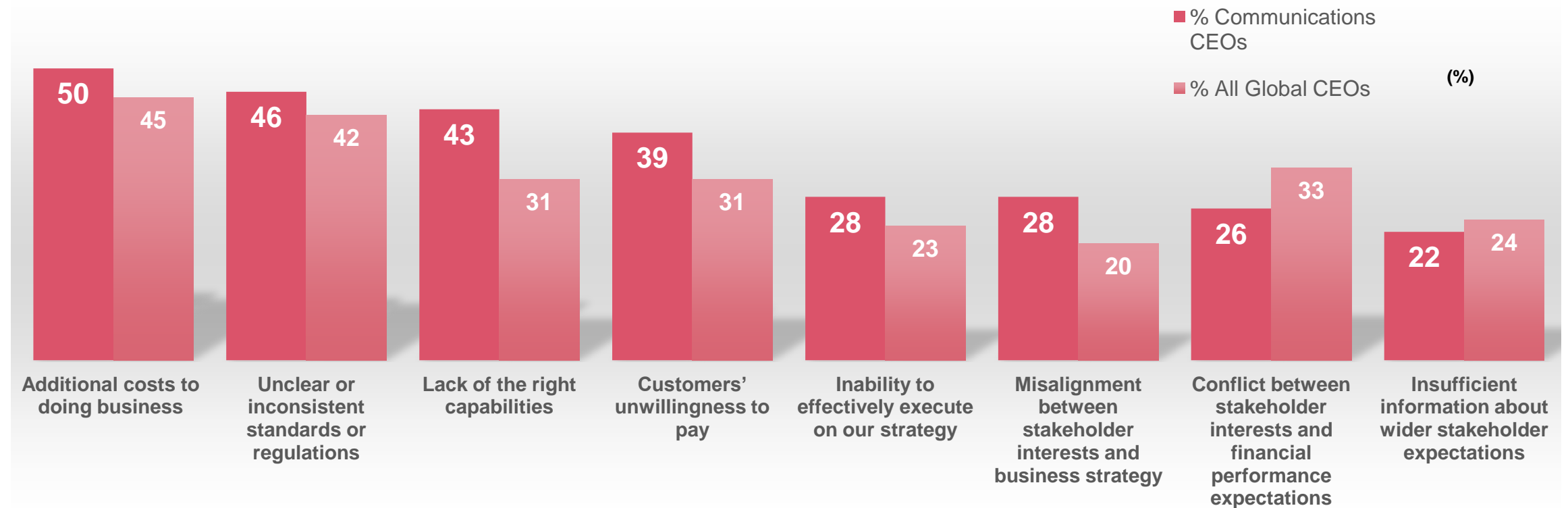
Responding to greater expectations

Communications CEOs know they will increasingly be expected to address wider stakeholder needs and create value for wider stakeholders in the next five years



Barriers to transformation

Communications CEOs are facing barriers to execution when responding to changing customer and stakeholder expectations. A lack of the right capabilities is high on the list.



Q: Which of the following barriers, if any, is your organisation encountering when responding to wider stakeholder expectations?

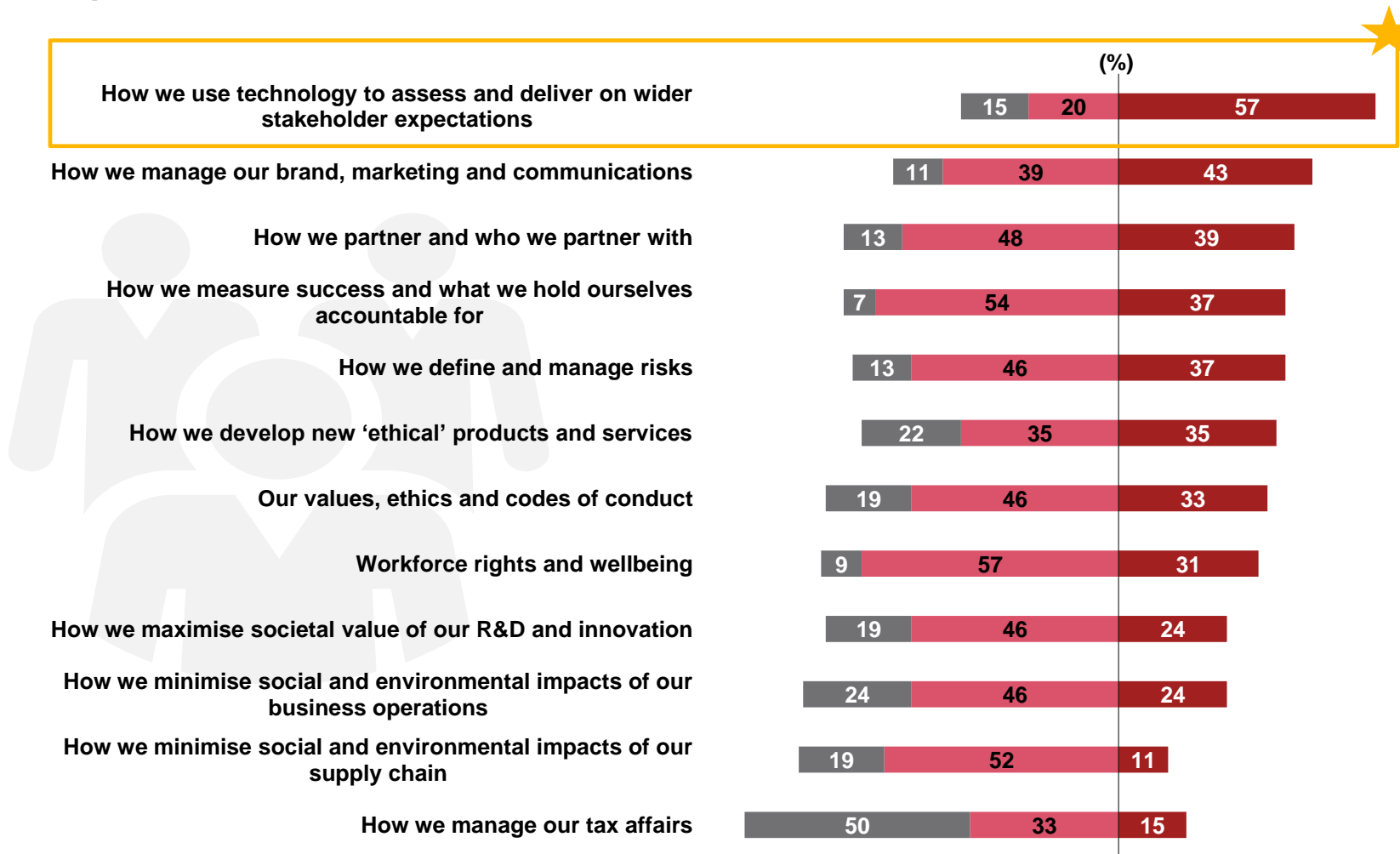
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Time for change

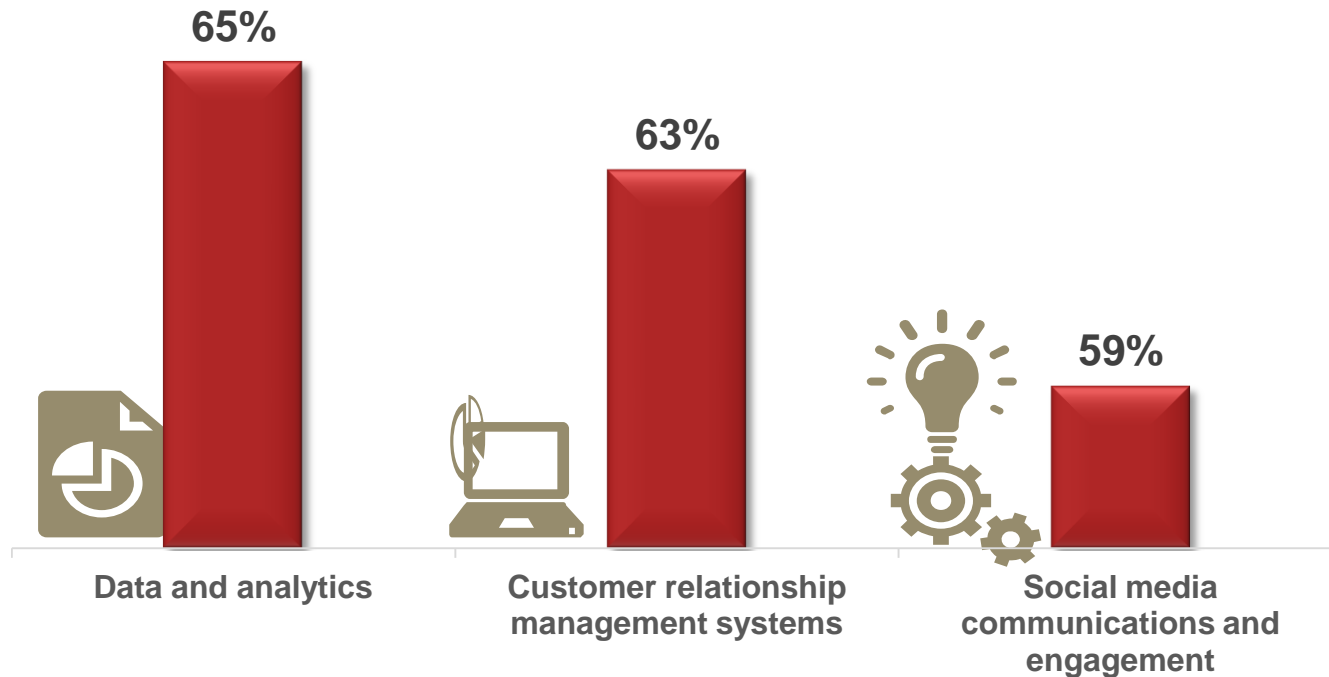


Q. To what extent are you making changes in the following areas in response to changing stakeholder expectations?

■ No change at all ■ Some change ■ Significant change

Putting technology to work

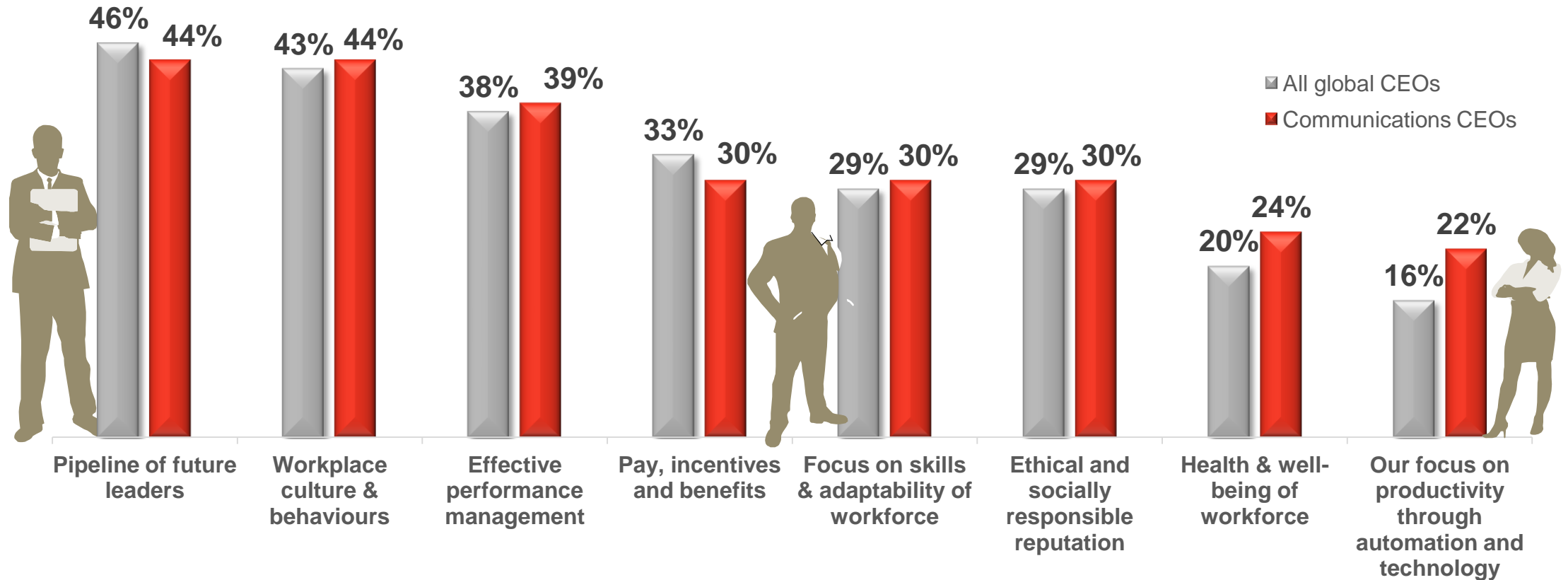
Two thirds of Communications CEOs believe data analytics and CRM systems will generate the greatest engagement with stakeholders.



Q: Please select the connecting technologies you think generate the greatest return in terms of engagement with wider stakeholders.

The people edge

Communications CEOs are most likely to change their talent strategy to focus on workplace culture and behaviours and their pipeline of future leaders.



Q: What aspects of your talent strategy are you changing to make the greatest impact on attracting, retaining and engaging the people you need to remain relevant and competitive?

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