

Institution: Bournemouth University		
Unit of Assessment: 34		
Title of case study: Managing media firms: informing regulation, strategy practices and performance		
Period when the underpinning research was undertaken: 2013-2019		
Details of staff conducting the underpinning research from the submitting unit:		
Name(s): Dr John Oliver	Role(s) (e.g. job title): Associate Professor of Media Management	Period(s) employed by submitting HEI: 1995-current
Period when the claimed impact occurred: 2016-2019		
Is this case study continued from a case study submitted in 2014? No		
<p>1. Summary of the impact (indicative maximum 100 words)</p> <p>Dr John Oliver's research into strategic digital transformation was used to inform UK communications policy decisions and regulatory measures on Sky Plc, and contributed to the policy debate that resulted in Ofcom's new remit as the UK internet regulator. It resulted in significant instrumental and financial benefits for leading media, communications and management consultancies, as well as direct economic impacts, including new jobs and multi-million-pound investments made by Tesco, John Lewis and Unilever.</p> <p>The reach of his scenario planning research extends to government agencies and businesses in Kuwait, Saudi Arabia, UAE, Pakistan and Liberia, who invested significant resources into capacity building capabilities in strategic communications and new strategy practices. It also contributed to the consulting firm, Bell Pottinger, generating more than GBP3,500,000 in revenue from client fees.</p>		
<p>2. Underpinning research (indicative maximum 500 words)</p> <p>Digitalisation and new media technologies have acted as key drivers of market disruption and the transformational change of media firms. The overarching theme of the research is the 'management of media firms to include their regulation, strategy practices and performance' in a digital environment. Two key themes from the underpinning research support the instrumental impact:</p> <p>Media firms managed the digital transition by adapting strategy and capabilities</p> <p>Research by Oliver [R1, R2] presents a pioneering conceptual framework that developed an 'intellectual bridge' between the previously discrete fields of media strategy, dynamic capabilities and media firm performance. This provided a more holistic view of strategic transformation and <i>how</i> media firms had navigated a disruptive digital environment by adapting strategy, investing in new capabilities, and the impact of these changes on financial performance.</p> <p>In addition, Oliver and collaborator R. G. Picard (University of Oxford) studied a 22-year period of Sky Plc corporate strategies, and found that it had entered numerous media, telecoms and entertainment markets which had delivered increased competition [R3]. The research findings indicated that defining the UK media industry remained a relatively straight-forward task, which is significant because previous knowledge suggested that digital disruption had created ill-defined media industry boundaries, thus making policy and regulatory measures more difficult to address.</p>		

Oliver presented original findings [R4] which demonstrated that a transformative digital environment had affected the economic performance of different sub-industries within UK creative industries. The research also benchmarked employee productivity for the first time, which contributed to the limited knowledge base on industry-level performance in the creative industries.

Scenario planning helps media firms create strategy in an uncertain digital environment

Oliver presented original findings [R5] on the usage and satisfaction of the methods that executives used to develop media strategy. The findings add to the limited knowledge on our understanding of *how* media firms are managed and highlighted significant levels of uncertainty in the UK media industry. It also indicated that media executives were not satisfied with their knowledge and skills in using scenario planning as a tool to develop media firm strategy. Oliver subsequently delivered Continuing Professional Development (CPD) training in the use of scenario planning with two leading media and communications consultancies, Bell Pottinger and OMD UK, in order to improve their skills and performance.

Bell Pottinger used Oliver's research [R5, R6, R2] and CPD training to develop strategic communication capabilities and strategies with government agencies and businesses in Kuwait, Saudi Arabia, UAE, Pakistan and Liberia. (It should be noted that Oliver worked with Bell Pottinger's 'Sans Frontières Division', which was not associated with the firm's controversial campaign in South Africa.)

The paper by Oliver and OMD UK's Strategic Partnerships Director Emma Parrett [R6] provided empirical findings on the individual and organisational outcomes of using scenario planning to develop media strategies for Google subsidiary YouTube. The research concluded that scenario planning enabled OMD UK executives to make better sense of often conflicting macro-environmental trends and find more advanced strategic solutions for its clients. The research findings also concluded that as 'creativity' is often considered to be an underpinning tenet of successful media firms, this method of scenario planning 'culturally fitted' with OMD UK as it combined rigorous strategic analysis with creative thinking in order to deliver a range of strategic media solutions.

3. References to the research (indicative maximum of six references)

The body of research that underpins the impact described in this case study has been through a rigorous quality review process at Bournemouth University. This included a series of internal and external review and moderation panels which concluded that the research is at least of two-star quality.

R1: Oliver, J.J. (2014), "Dynamic capabilities and superior firm performance in the UK media industry", *Journal of Media Business Studies*, Volume 11, Issue 2, pp. 55-77. DOI: [10.1080/16522354.2014.11073580](https://doi.org/10.1080/16522354.2014.11073580)

R2: Oliver, J.J. (2018), "Strategic Transformations in the Media". *Journal of Media Business Studies*, Volume 15, Issue 4, pp. 278-299. DOI: [10.1080/16522354.2018.1546088](https://doi.org/10.1080/16522354.2018.1546088)

R3: Oliver J.J. and Picard, R.G., (2020), "Shaping the corporate perimeter in a changing media industry", *International Journal on Media Management*, Volume 22, Issue 2, pp. 67-82. DOI: [10.1080/14241277.2020.1716767](https://doi.org/10.1080/14241277.2020.1716767)

R4: Oliver, J.J. (2017), "Exploring industry level capabilities in the UK Creative Industries", *Creative Industries Journal*, Volume 10, Issue 1, pp. 75-88. DOI: [10.1080/17510694.2017.1282302](https://doi.org/10.1080/17510694.2017.1282302)

R5: Oliver, J. J. (2013), "Media Management Tools: UK broadcast media executives' perspective", *The International Journal on Media Management*, Volume 15, Issue 4, pp. 245-257. DOI: [10.1080/14241277.2013.863100](https://doi.org/10.1080/14241277.2013.863100)

R6: Oliver, J.J. and Parrett, E. (2018), "Managing future uncertainty: Re-evaluating the role of scenario planning", *Business Horizons*, Volume 61, Issue 2, March–April, pp. 339-352. https://papers.ssrn.com/sol3/papers.cfm?abstract_id=3127428
DOI: [10.1016/j.bushor.2017.11.013](https://doi.org/10.1016/j.bushor.2017.11.013)

4. Details of the impact (indicative maximum 750 words)

Overall, Oliver's research findings led to a number of significant instrumental and financial impacts in the UK with Ofcom (the UK's communications services regulator), leading media, communications and management consultancies; and outside the UK with government agencies and businesses in the Middle East, Pakistan and Liberia. As a result of his research, Oliver also joined Ofcom's expert group to measure the BBC's performance under Public Purpose 3 (Distinctiveness).

Impact on UK media regulation

Oliver's research [R1, R2, R3] provided insight into how Sky Plc had adapted its media strategy and managed the digital transition. It provided evidence that enabled Ofcom to gain "a unique insight into their strategic approach" and the reasons behind Sky Plc's growth strategy [E1].

Previously, Ofcom had been concerned that Sky Plc were moving towards a monopoly position in the pay-TV market, but the research findings enabled Ofcom to "think differently about their 'growth strategy' and presented them in a different light". Ofcom used Oliver's findings to conclude that Sky Plc's entry into new markets (broadband, Wi-Fi, fixed and mobile telephony) had "contributed to increased levels of competition in those sectors", which resulted in a policy decision "not to implement more demanding regulatory measures on Sky" [E1].

The findings also provided Ofcom with an opportunity to "consider the extent of their remit as a communications regulator, and the potential areas where they could use their expertise in the future". The findings were used to inform strategic discussions on its - ultimately successful - remit on the UK's "regulation of the internet" [E1].

Impact on firm strategy and resource allocation

The Hackett Group is a global management consultancy offering consultancy on digital transformation and firm performance to 97% of the US Dow Jones Industrial Index firms and 59% of the UK's FTSE 100 firms. Oliver's research into strategic digital transformation [R1, R2, R4] provided "an innovative approach that integrated strategy, firm resource allocation and key performance indicators" [E2], which directly influenced the strategic approach to the development of a new digital strategy and analytics service to improve the economic competitiveness of its clients. In particular, the research changed the company's "strategic approach, particularly in terms of targeting CEOs as well as CFOs with this new consultancy service" [E2].

The Hackett Group successfully launched its new consultancy service in 2016, which resulted in significant revenue and profits from consulting fees. The direct economic impact of the research has also resulted in multi-million-pound investments made by its clients (Tesco, John Lewis and Unilever) into resources and new jobs in digital strategy and analytics departments [E2].

Impact on how firms and government agencies manage strategic uncertainty

The findings from the scenario planning research resulted in instrumental and financial impact outcomes for the international media and communications agency, Bell Pottinger.

Bell Pottinger used Oliver's research into strategic media transformations and scenario planning [R2, R5, R6] and Oliver's CPD training on scenario planning in its senior communicators

development programme, and wider consultancy projects, for a range of government agencies in the Middle East. Oliver was involved in client briefings, and subsequent Bell Pottinger engagements with government agencies were “based directly” on his scenario planning research [E3].

Oliver’s research findings [R6] provided clients with a structured and creative approach that resulted in them changing their “ingrained behaviours” [E3] and developing adaptive strategies, whilst operating in uncertain working conditions. A former partner at Bell Pottinger stated that Oliver’s scenario planning approach resulted in the firm providing “better client advice and more appropriate strategic responses” [E3] and had been used “to launch a new business” (Special Project Partners Ltd.), which provides “strategic communication consultancy services to government agencies and multinational firms worldwide” [E3].

In 2017, the use of scenario planning contributed to Bell Pottinger generating more than GBP3,500,000 in revenue from consulting fees, whilst its clients made significant investment in new communication resources [E3]. The scenario planning research findings were also used to develop flexible strategic responses for a political party in Pakistan and an agri-business in Liberia [E3].

5. Sources to corroborate the impact (indicative maximum of 10 references)

E1: Ofcom. (2018). Testimonial letter, 16 November.

E2: The Hackett Group. (2018). Testimonial letter, 4 October.

E3: Special Project Partners Ltd. (2019). Testimonial letter, 8 October.