

# State of MediaTech

Strategic report prepared for NAB Show 2025 by IABM's Business Intelligence Unit

# Introduction

About this report

# IABM Research Streams

The new structure of the Business Intelligence Unit services

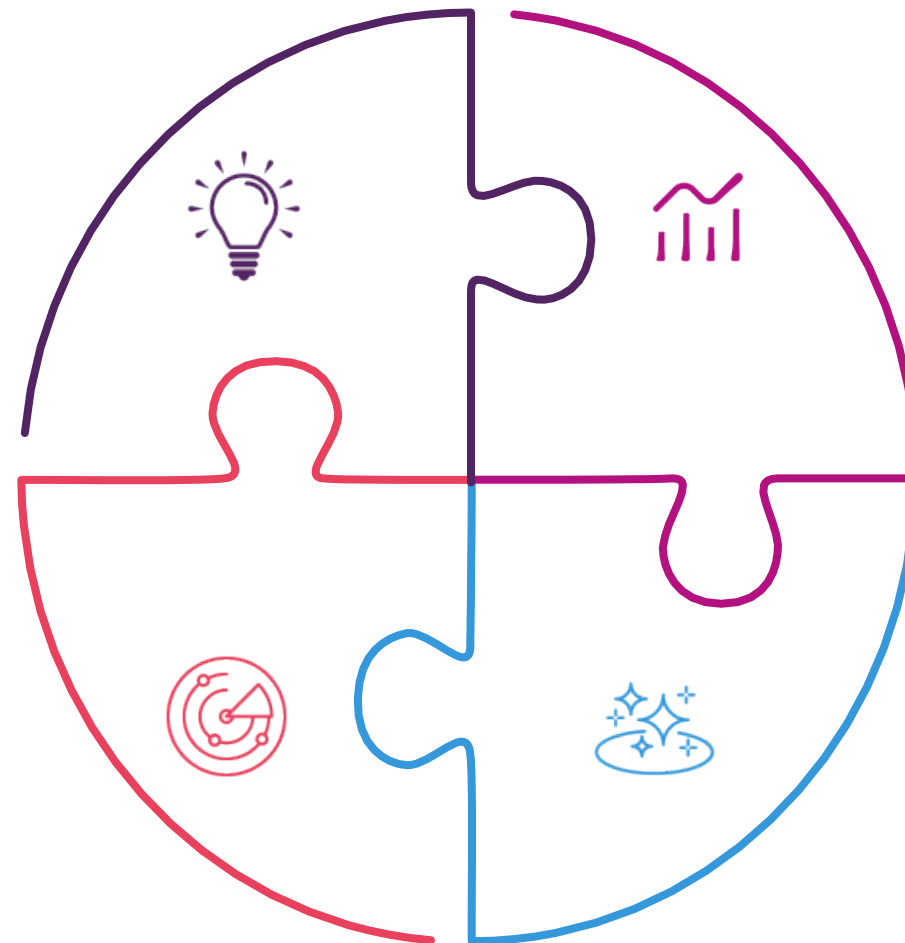
## State of MediaTech

Strategic analysis of MediaTech sector



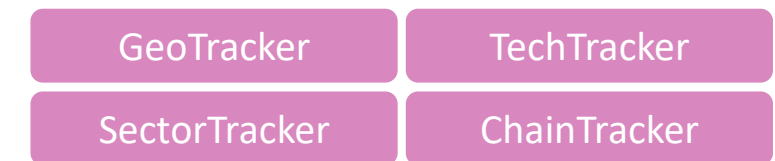
## MediaTech Radar

Blogs and newsletters focusing on spotlight topics in MediaTech



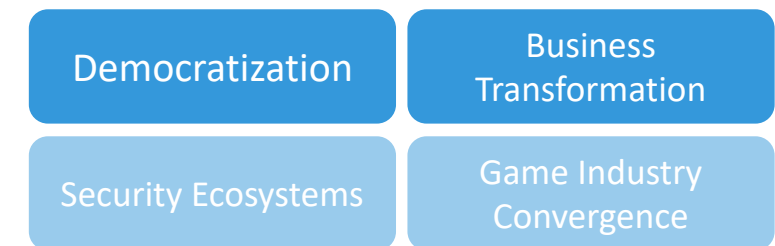
## Trackers

Analysis of specific trends in different segments, technologies, geographies and sectors



## Megatrends

Analysis of major trends that are fundamentally changing MediaTech



# Recently Published Reports

All IABM research is accessible on the MediaTech Vantage platform

## Spotlight topics



**State of MediaTech**  
April 2025

Data-driven strategic analysis of the MediaTech industry. Published twice-annually before the NAB Show and IBC.



**Democratization**  
December 2024

Exploring the process of democratization and its impact on people, technology and markets.



**Business Transformation**  
March 2025

Strategic analysis and actionable insight for organizations considering business transformation in MediaTech.

## Other reports

Business Transformation	28 March 2025
Democratization of MediaTech	23 December 2024
ChainTracker™	16 December 2024
SectorTracker™	16 December 2024
State of MediaTech — InterBEE 2024 (Presentation)	13 November 2024
State of MediaTech — NAB Show New York 2024 (Presentation)	10 October 2024
TechTracker™	30 September 2024
State of MediaTech — IBC Show 2024 (Report)	13 September 2024
State of MediaTech — IBC Show 2024 (Presentation)	13 September 2024
Tangible Sustainability in MediaTech Report	30 August 2024
Talent Megatrend Report	31 May 2024
State of MediaTech CABSAT 2024 Presentation	21 May 2024
GeoTracker	1 May 2024
State of MediaTech NAB 2024 Report	15 Apr 2024
State of MediaTech NAB2024 Presentation	15 Apr 2024

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# State of MediaTech

This report was prepared using a hybrid research approach

This report leverages a comprehensive, hybrid research approach, combining diverse data sources and methodologies to ensure a holistic view of the industry trends. Our methodology encompasses the following key components:

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## Primary Research

**Quantitative:** Survey data is at the core of our analysis, providing quantitative insights into the industry's prevailing trends and sentiments.

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**Qualitative:** To complement our quantitative data, we conducted in-depth interviews with a select group of industry experts. These discussions have provided rich qualitative insights, adding depth and context to our findings.

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## Secondary Research

**Desk-based:** Our research is further enhanced by an extensive review of both structured and unstructured public data. This includes an analysis of industry executive quotes, reports, and publications, which offer valuable perspectives on industry trends.

We have also incorporated quantitative data from reputable external sources. This data has been carefully selected to enrich our understanding of the industry dynamics and to provide a benchmark against our primary research findings.

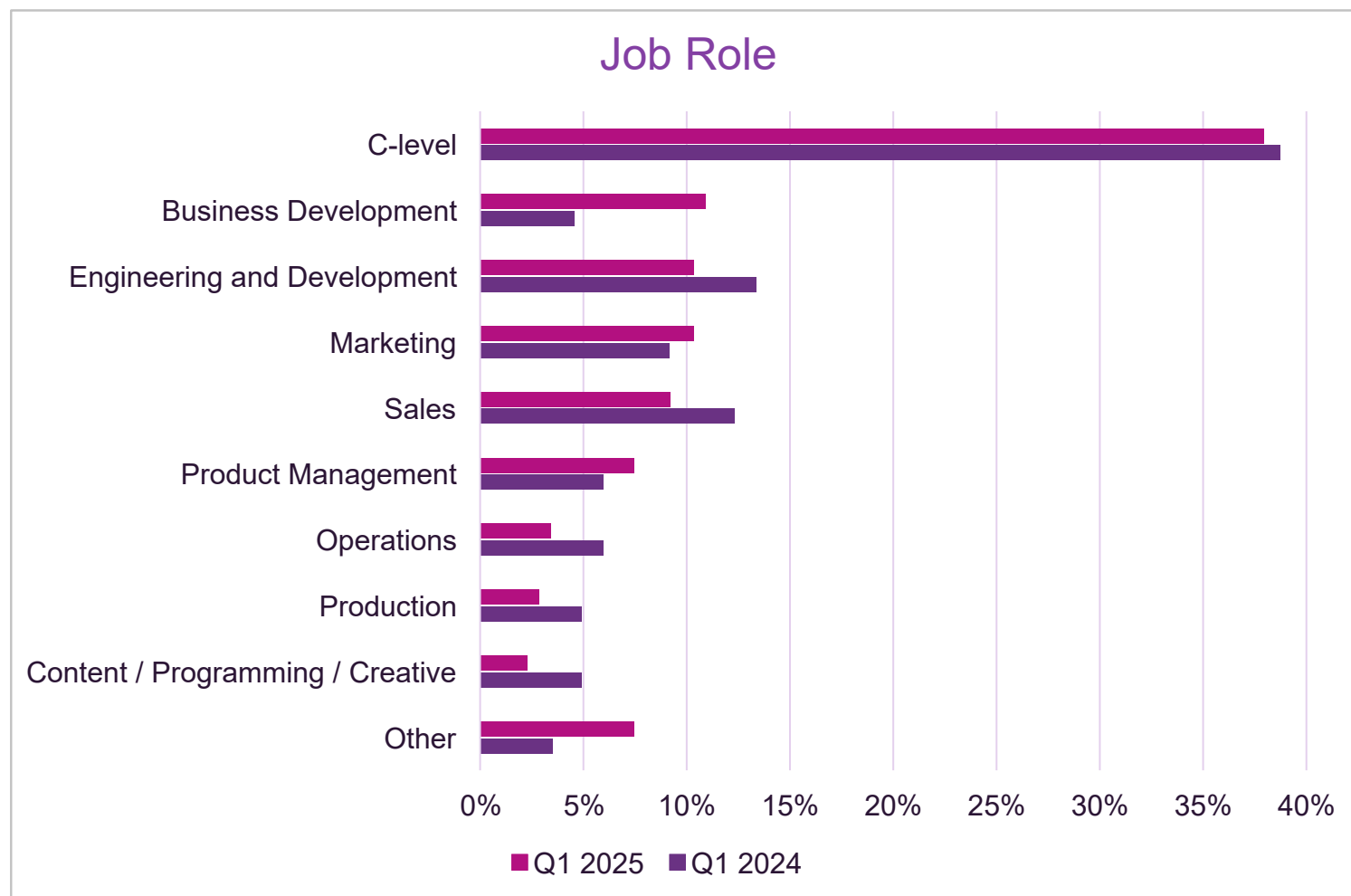
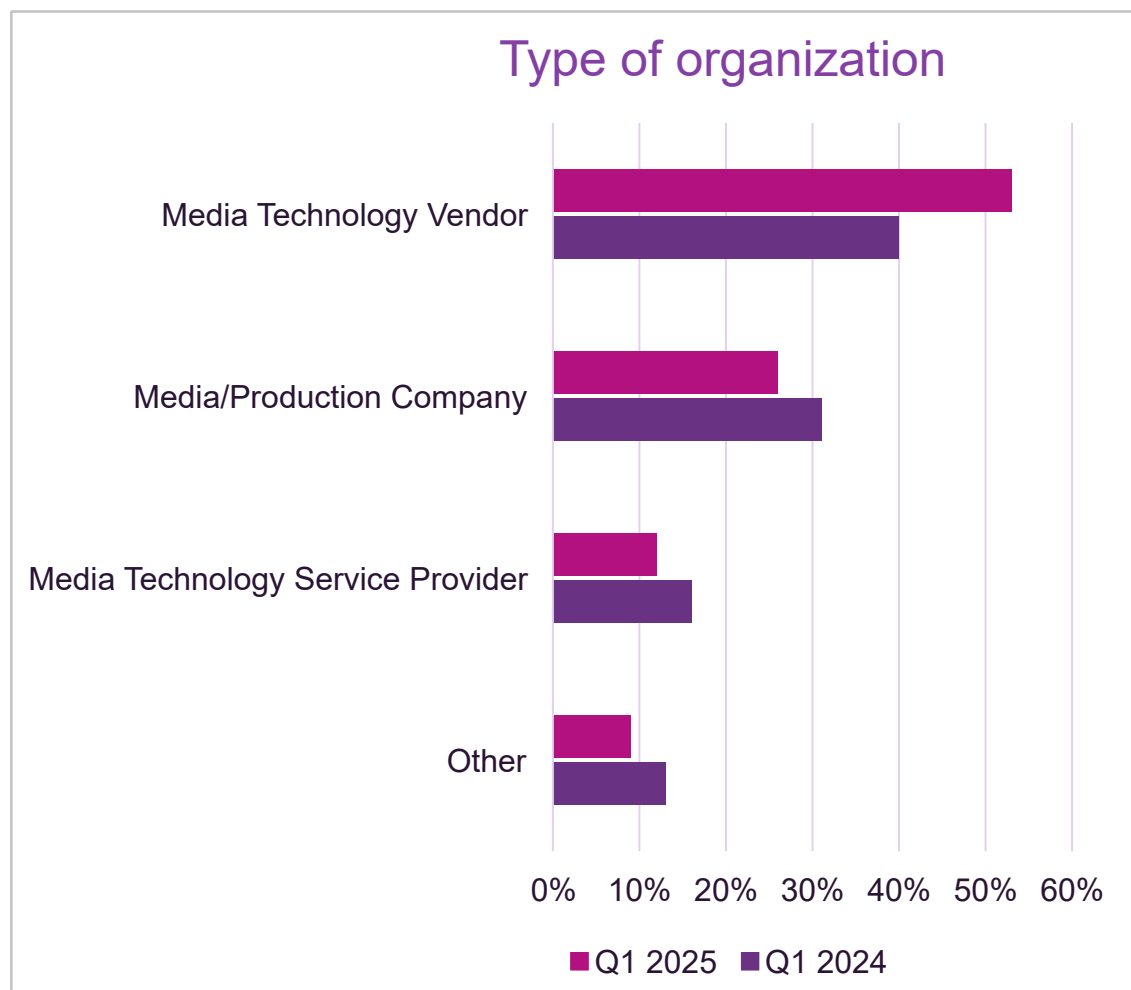
# About this Report

## An overview of the contents

- This special report is based on exclusive research conducted by IABM before NAB 2025. It aims to provide a strategic analysis of the MediaTech industry with a data-driven focus.
- The main body of this report is divided into three core topical sections:
  - The first section analyses the business environment affecting the MediaTech sector.
  - The second analyses investment and adoption trends in MediaTech.
  - The third provides a brief update on key drivers of change in the industry.
- On the following pages, you can find an executive summary of the report highlighting key findings.
- You can find more information on the sources used to produce this report in the Appendix at the end.
- If you have any feedback about this report, please contact: [insight@theiabm.org](mailto:insight@theiabm.org). We would really appreciate it as we always strive to improve our research.

# Survey Sample Overview

A total of 190 media organizations contributed to the survey in 2025 YTD



The “Other” category includes: Consulting, Corporate, Education/Training, Freelancing, Government/Military, Sports, Marketing/Advertising Agencies, Healthcare, Live Music

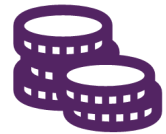
The “Other” category includes: Data Analytics and Science, Engineering, R&D, Consulting and Strategy, Management, Support, and Services.

# Executive Summary

Key highlights of this research

# State of MediaTech

Common threads in this research



## Profitability

Media businesses focus on optimizing profitability as they pivot towards new business models at an accelerated rate



## Transformation

Organizations need to recalibrate their business models and technology stack to operate effectively in the contemporary market



## Agility

In a volatile and unpredictable global environment, organizations need to be able to adapt quickly to rapidly changing market conditions

# State of MediaTech

## Key highlights:

- 2025 YTD registered a **decrease in business confidence** compared to 2024 as the **NET outlook** for the overall business environment **fell by 7% points** to 53%. This marks **two years of consecutive decline** on a linear trajectory as NET outlook for 2024 dropped by 7% points compared to 2023.
- The strength of positive sentiment has also reduced, as **the share of respondents with a very positive outlook has fallen**, while those with a quite positive outlook has risen. This is indicative of a more tentatively positive or even cautious market outlook. This could also be interpreted as respondents becoming more accepting of the current business environment. 1% of respondents cited the business environment as very negative; no respondents have given this answer since 2020.
- **Continued news of job cuts** in the MediaTech industry and the **closure of businesses** (including industry stalwarts such as Technicolor) are contributing to **falling business confidence**. This is also reinforcing the need for organizations to reshape their operations and business models to remain sustainable.
- However, a number of organizations that have **committed to business transformation** in recent years are already **demonstrating success in 2024 year-end results**, including Netflix and ITV **increasing their profitability**.

# State of MediaTech

## Key highlights:

- Broadcast and media organizations are embracing the **fragmentation of audiences** across platforms and devices by developing new services. This is providing **more opportunities for advertisements and personalization**, increasing revenue streams for media owners and quality of service for consumers.
- **NET investment outlook has fallen** from 34% to 22%. The proportion of respondents expecting their media technology budget to increase over the next year has fallen from 49% to 45%, however NET investment outlook overall has fallen to a greater extent as **the proportion of respondents expecting a decline in budget has grown** from 15% to 23%.
- After significant **acceleration in the investment in AI and ML** in 2024, the technology was cited by an **even greater proportion** of respondents in 2025 YTD, becoming the **highest-ranking roadmap item**, cited by 60% of the 2025 YTD sample.
- The cloud technology investment categories for 2025 YTD are not directly comparable to previous iterations of the MediaTech Industry Tracker as the IABM Business Intelligence Unit have made **updates in response to IABM member feedback** to reflect the need for **more granular analysis of cloud deployment**. This report contains the first set of results that **separate cloud compute, cloud storage, and virtualization** as distinct areas of investment, and question further in relation to the use of **private and public cloud**, as well as preferred payment models.

# State of MediaTech

## Key highlights:

- The leading purchasing factor for MediaTech buyers was **innovation & future roadmap** cited by 57% of respondents. This was followed by consideration for **total cost of ownership** (53%) and then **flexibility & customization** (47%).
- **Security** rose by 5% points, following **AI & ML** (11% points) as the technology roadmap item with the **greatest YoY increase** in the proportion of respondents that cited it comparing 2025 YTD vs 2024, however it ranked 9th in the overall ranking by total number of respondents citing it. **IP transport & networking** was the **second most commonly** cited technology as a **main priority** (12%) after AI & ML (26%).
- **All nine segments** of the broadcast and media content chain **registered a decrease** in the proportion of respondents citing them in 2025 YTD vs 2024. **This indicates rationalization** as respondents focus investment on a smaller number of segments on average. **Create, support** and **store** were the three that **registered the greatest decline** in the proportion of respondents citing them as an area of investment comparing 2025 YTD with 2024 results.

# State of MediaTech

## Key highlights:

- Although the **rate of subscriber growth has slowed** for major streaming services, new developments in service structures and the **introduction of ad-supported tiers** is proving that **revenue growth** can still be generated by **boosting ARPU** (average revenue per user).
- Media streaming companies are focusing on **business transformation** to make their services more **profitable** rather than prioritizing audience growth as the main metric of success. The development of **ad-tech, search and discovery**, and **user experience (UX)** are all areas of focus that present opportunities for the **application of AI & ML** as well as other technologies to provide greater **personalization** based on individual audience members' unique tastes.
- Best practice for the adoption and integration of AI & ML is heavily debated. The potential **benefits for operational efficiency are widely accepted**, however the main **risk factors** that introduce caution are the **displacement of jobs, spread of misinformation**, and the **infringement of copyright and intellectual property**.
  - In response to the discourse around job losses to AI, technology providers are focusing messaging on **removing repetitive tasks and levelling up operators' capabilities** with the application of AI for **skills augmentation** (rather than replacement).

# State of MediaTech

## Key highlights:

- **Combatting misinformation**, and verifying the **provenance and authenticity** of content is vital to ensure **audience trust**. This is particularly critical for news and public service media companies.
- Studios, broadcasters, and production companies that have built their brands on the quality of their intellectual property and/or artistic merit need to **carefully navigate the introduction of generative AI** into their content supply chain with transparency to **avoid alienating fans and audiences**.
- Efforts to combat misinformation through the adoption of industry standards for provenance and authentication were **catalyzed in 2024 by national election global “super-cycle”** and the increased accessibility of generative AI.
- Although **cost has been a constraint** for media businesses’ adoption of generative AI, **DeepSeek R1** was introduced with **significantly lower API costs** than the leading alternatives which has **intensified competition on price** between providers.
- Following an **annual uplift** in the proportion of media technology vendors that had **hardware as their primary revenue source** in 2024 (41%) vs 2023 (35%), 2025 YTD has **maintained relative consistency** (40%). After hardware suffered from a period of increased investment in migration to cloud workflows, many **end-users are continuing to invest in hardware** where it delivers higher performance and/or is more cost efficient.

# State of MediaTech

## Key highlights:

- **Technology convergence** has led video technologies to be used in a **diverse range of vertical markets**. Following from a decline in revenue share attributed to broadcast and media that reached its zenith in 2023 amid the Hollywood strikes, 2025 YTD survey data illustrates a **continued resurgence in broadcast and media business** as the latter accounted for 61% of supplier's revenue on average.
- In terms of budgets for the coming year, the proportion of **respondents that expect to see an increase to their budgets declined** for the second consecutive year in 2025 YTD. Meanwhile the proportion of **respondents expecting a decrease to their budgets rose** by 8% to 23%.

# Business Environment

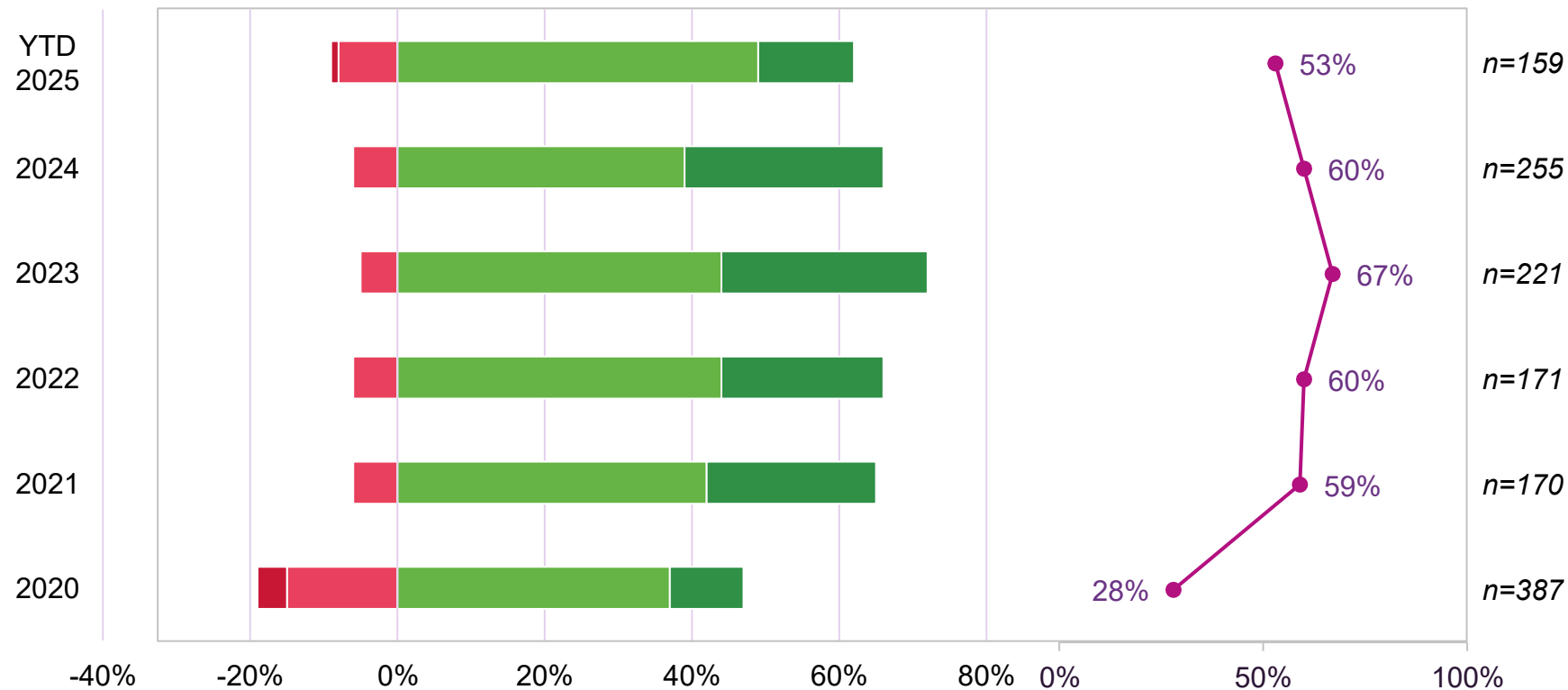
Key drivers of change in 2025 and beyond

# Business Environment

The business environment outlook has slightly deteriorated since last year

MediaTech Business Environment Outlook

NET (Positive – Negative)



## Business Confidence

NET Outlook is on track YTD to fall at a linear rate for a second consecutive year following a peak of 67% in 2023.

The strength of positive outlook has also diminished with YTD 2025 results registering a greater ratio of “quite positive” to “very positive” sentiment compared to 2024.

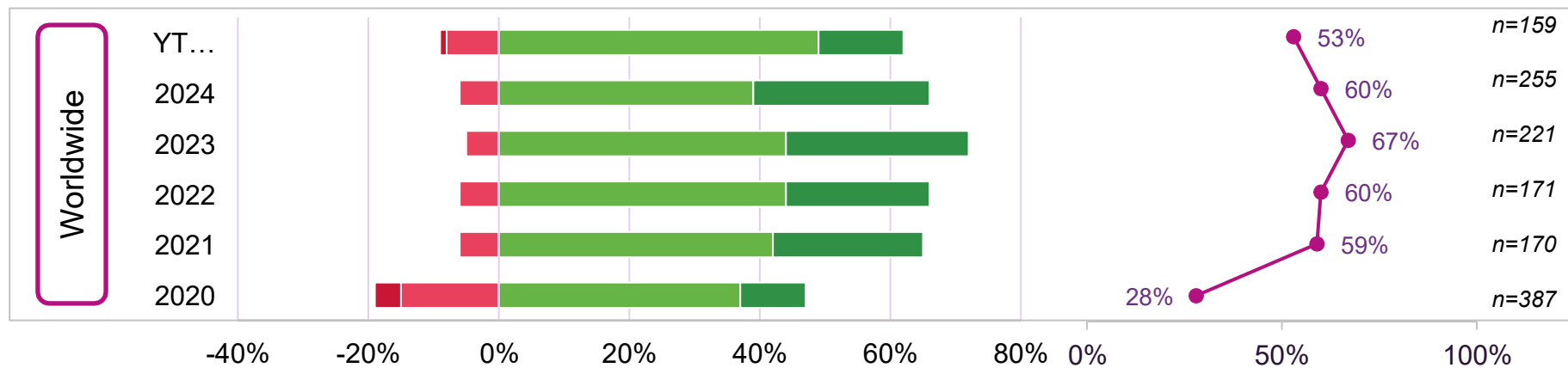
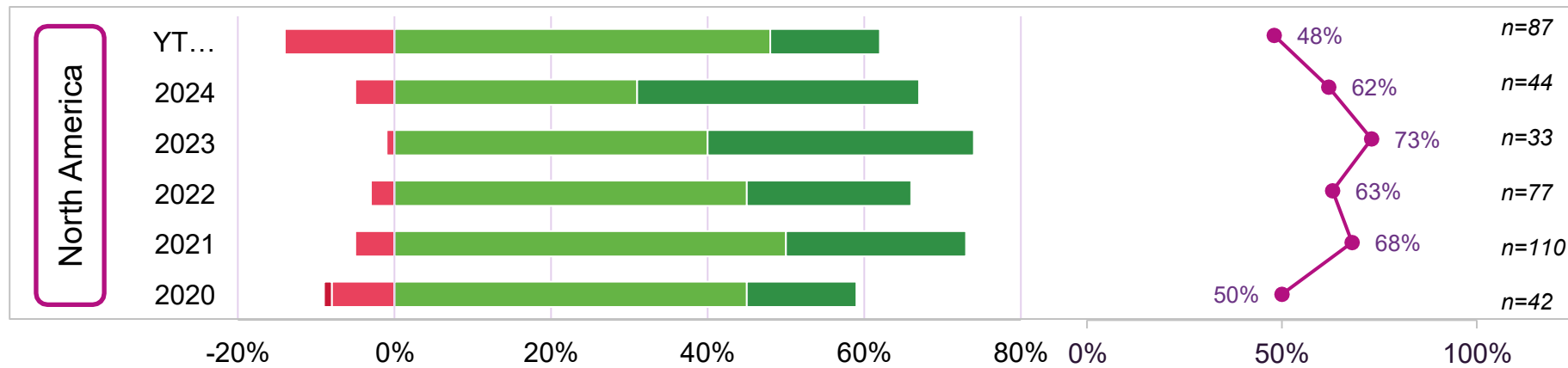
Q. What is your organization’s outlook for the overall business environment over the next year? (All Industry)

# Business Environment

The business environment outlook has slightly deteriorated since last year

MediaTech Business Environment Outlook

NET (Positive – Negative)



**Business Confidence**

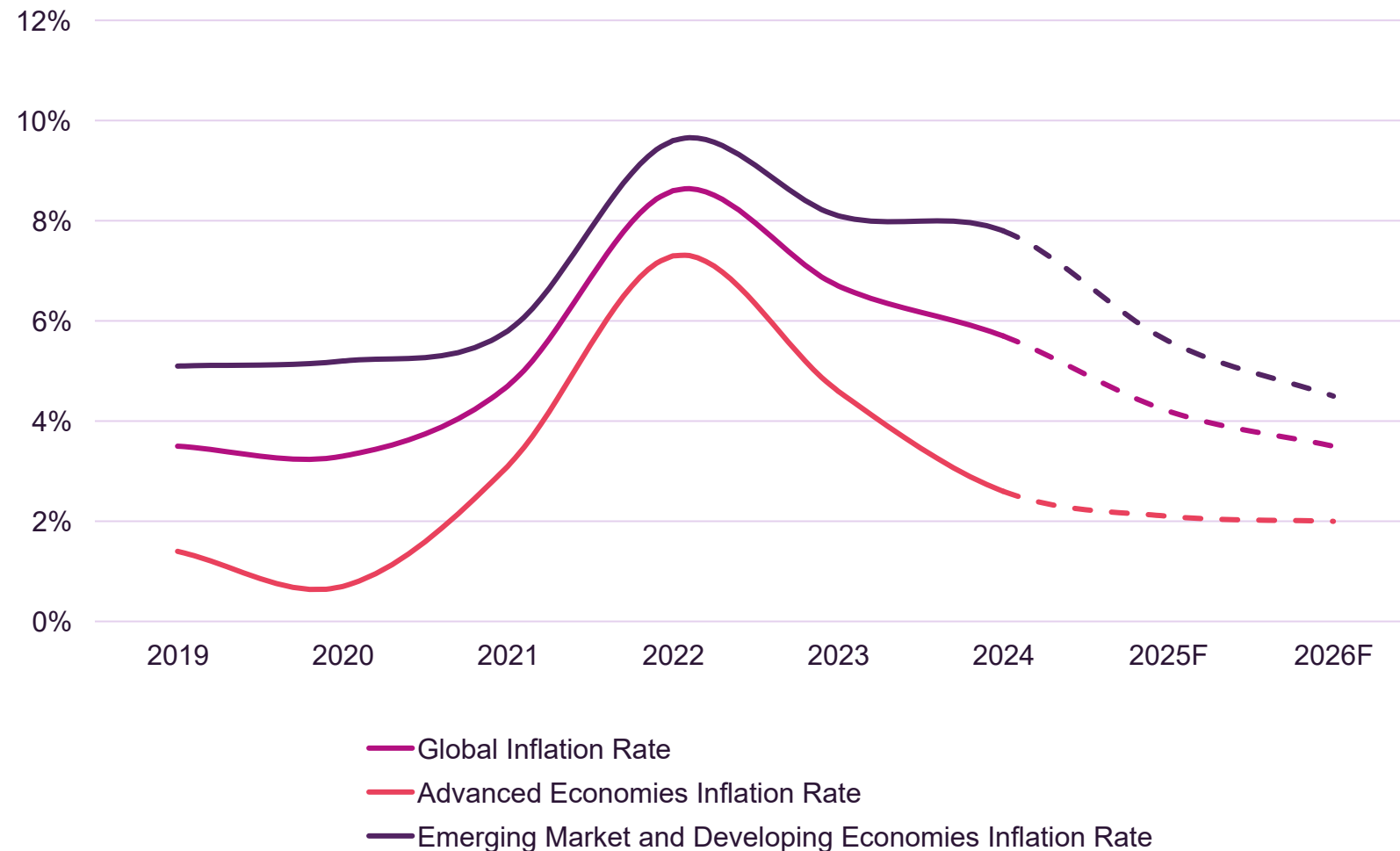
The decline in NET business confidence in North America has outpaced the level of decline registered by the full global sample.

Q. What is your organization's outlook for the overall business environment over the next year? (All Industry)

# Business Environment

Economic challenges continue to affect the industry

Global inflation rate



**Macro Headwinds**

The rate of inflation is falling but remains a challenge for the industry.

Geopolitical uncertainty continues to inhibit growth outlook for the world economy.

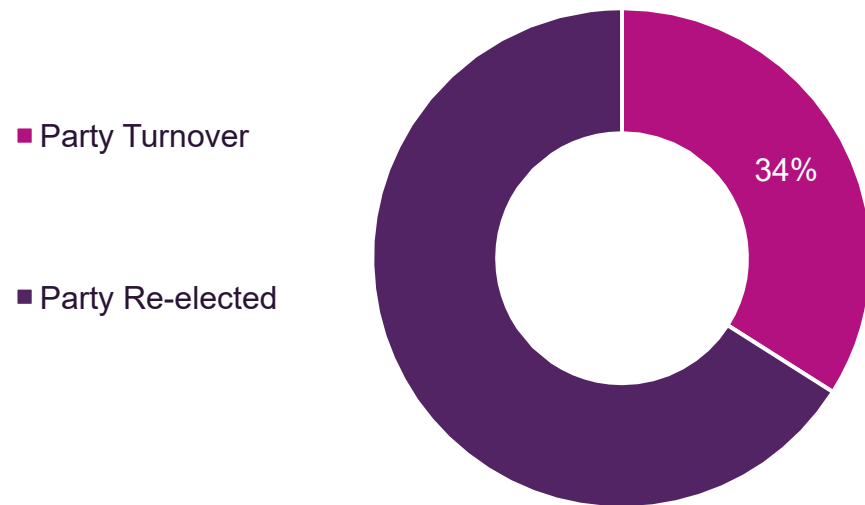
# Business Environment

2024 election “super-cycle” leads to significant turnover in global leadership

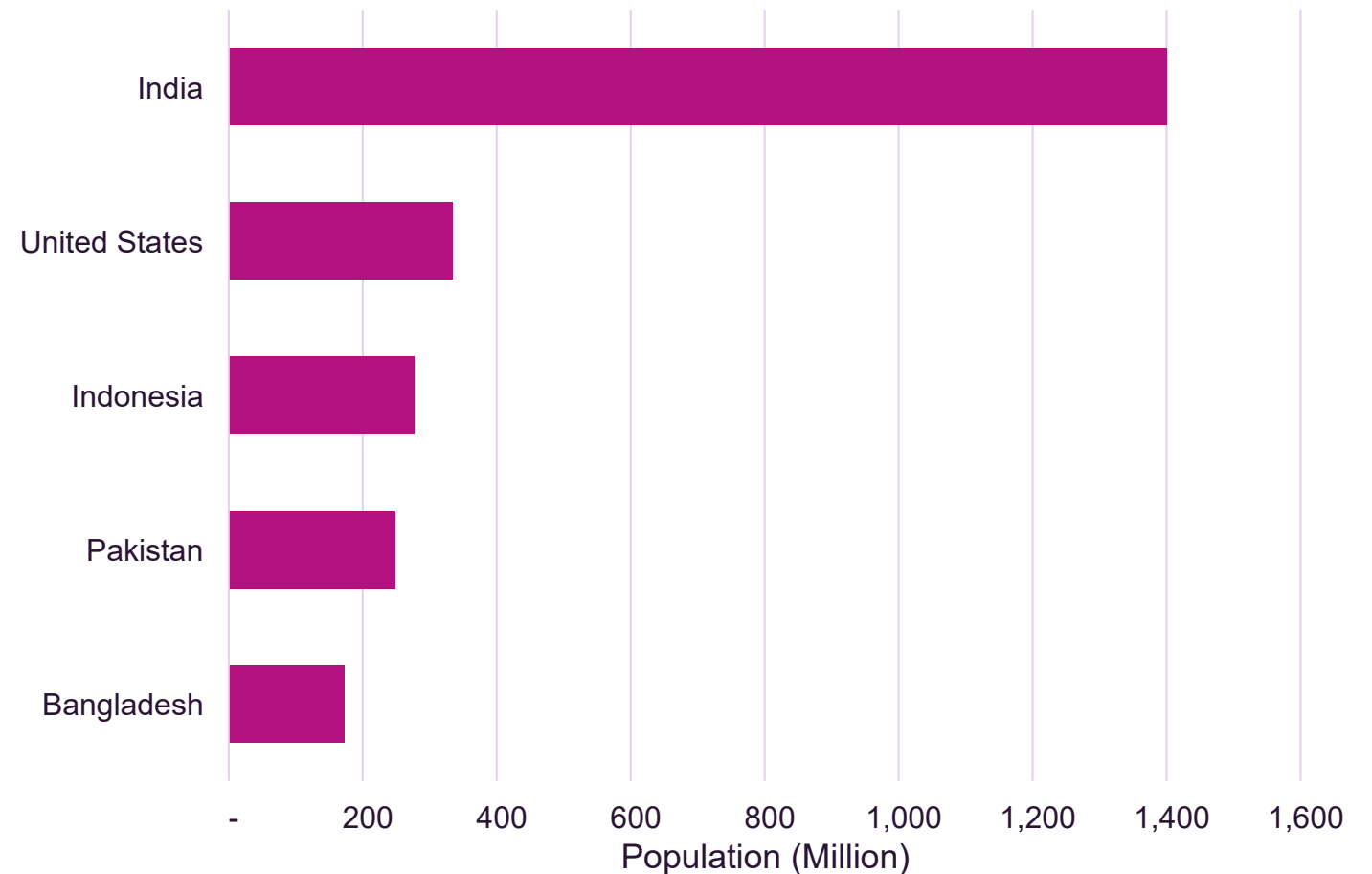
74

National elections successfully took place worldwide in 2024 as more democratic processes aligned in a single year than ever before.

Party Turnover at 2024 National Elections



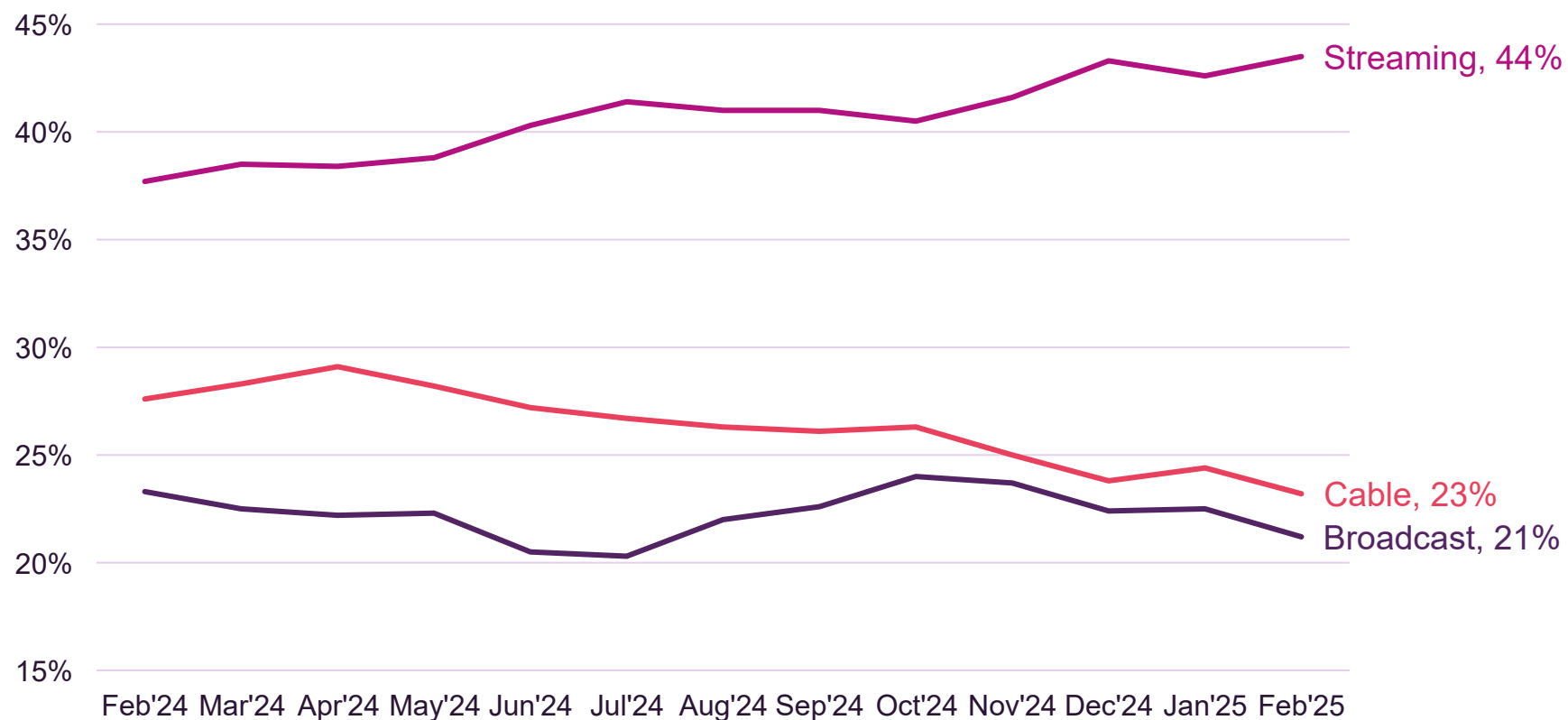
Top 5 Most Populous Countries Holding National Elections in 2024



# Business Environment

Audiences continue migrating toward streaming platforms

Share of viewing across platforms in the US



## Consumer Habits

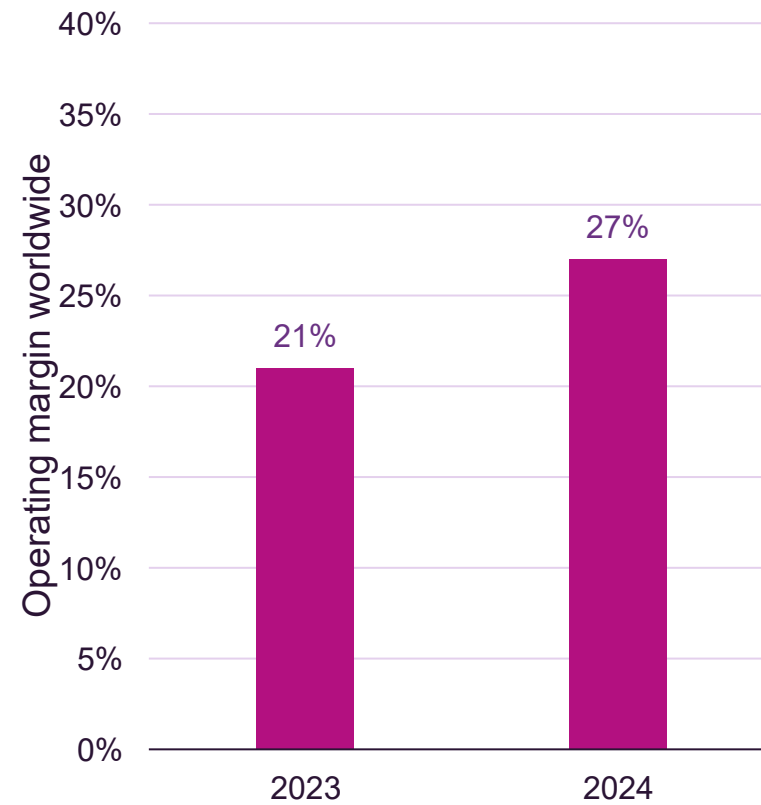
Streaming media continues to make gains in terms of consumer viewing across platforms in the US.

As the SVOD market matures, service providers introduce advertisement supported tiers and invest in developing FAST channels

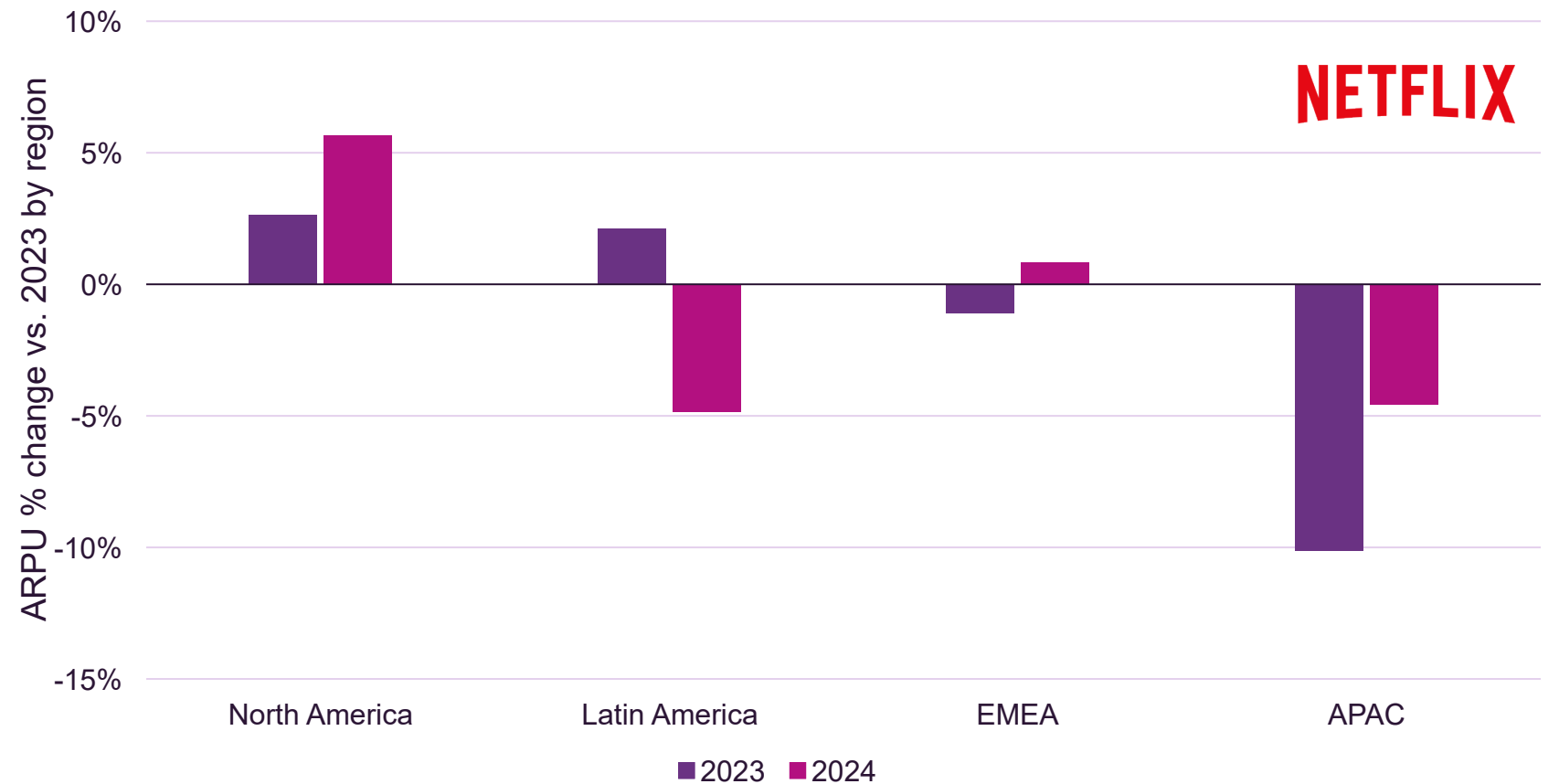
# Business Environment

Netflix's revenue and profitability continue to grow despite declining ARPU in some regions

Netflix's profitability



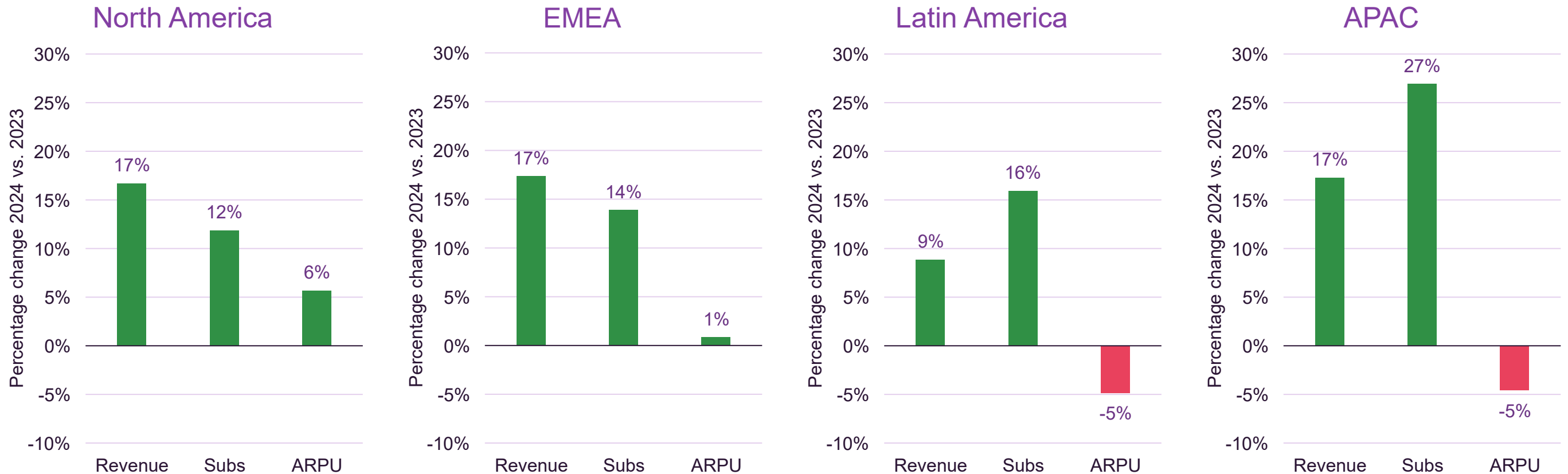
Regional changes in ARPU



# Business Environment

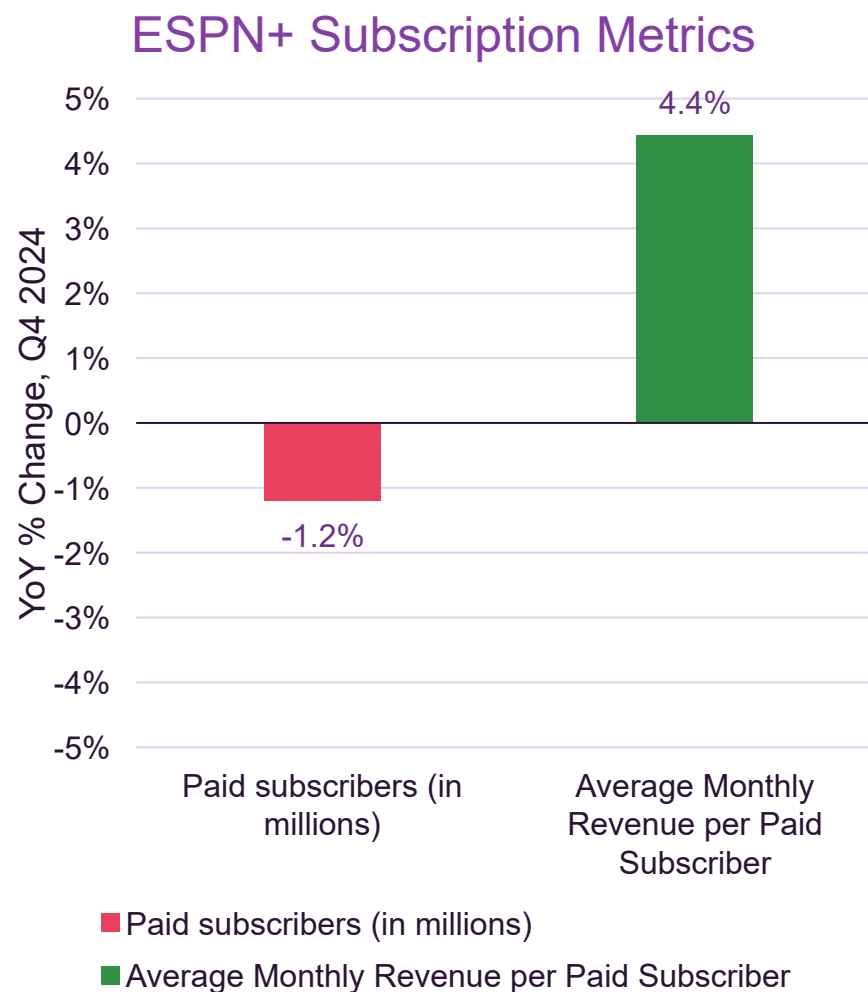
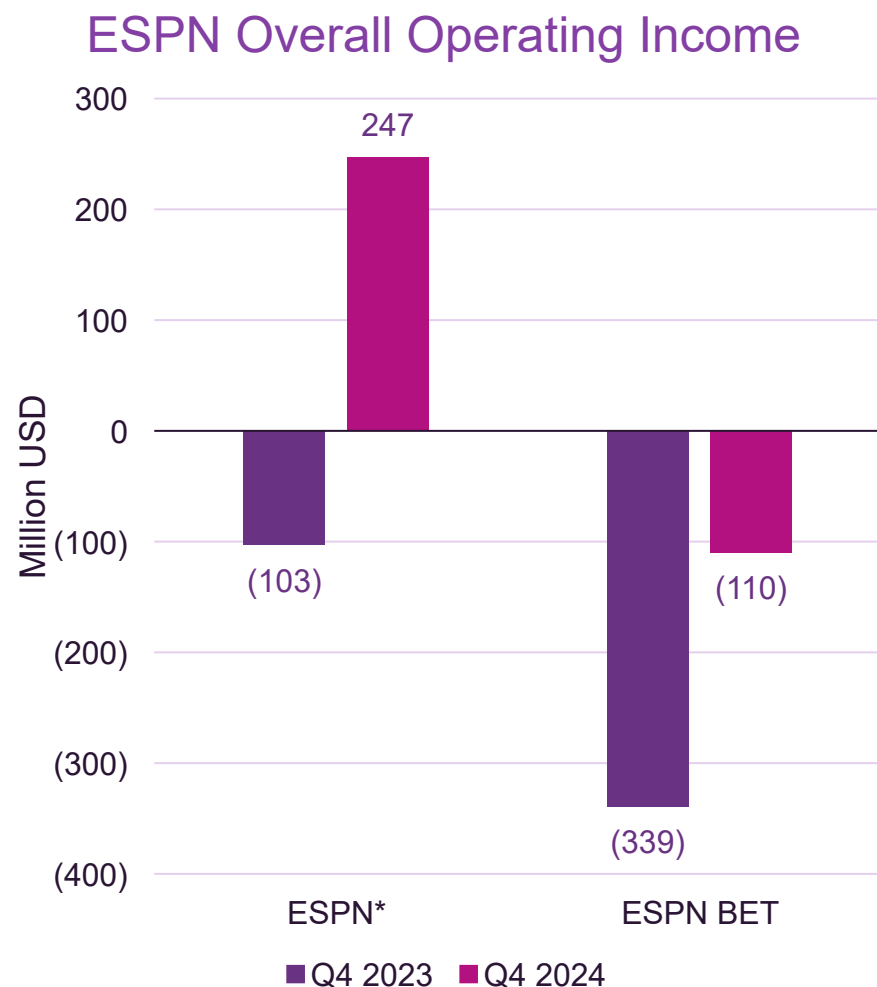
Netflix's revenue and profitability continue to grow despite declining ARPU in some regions

## NETFLIX



# Media Business Models

Price increases lead to growing DTC operating income



## Monthly Revenue Rises

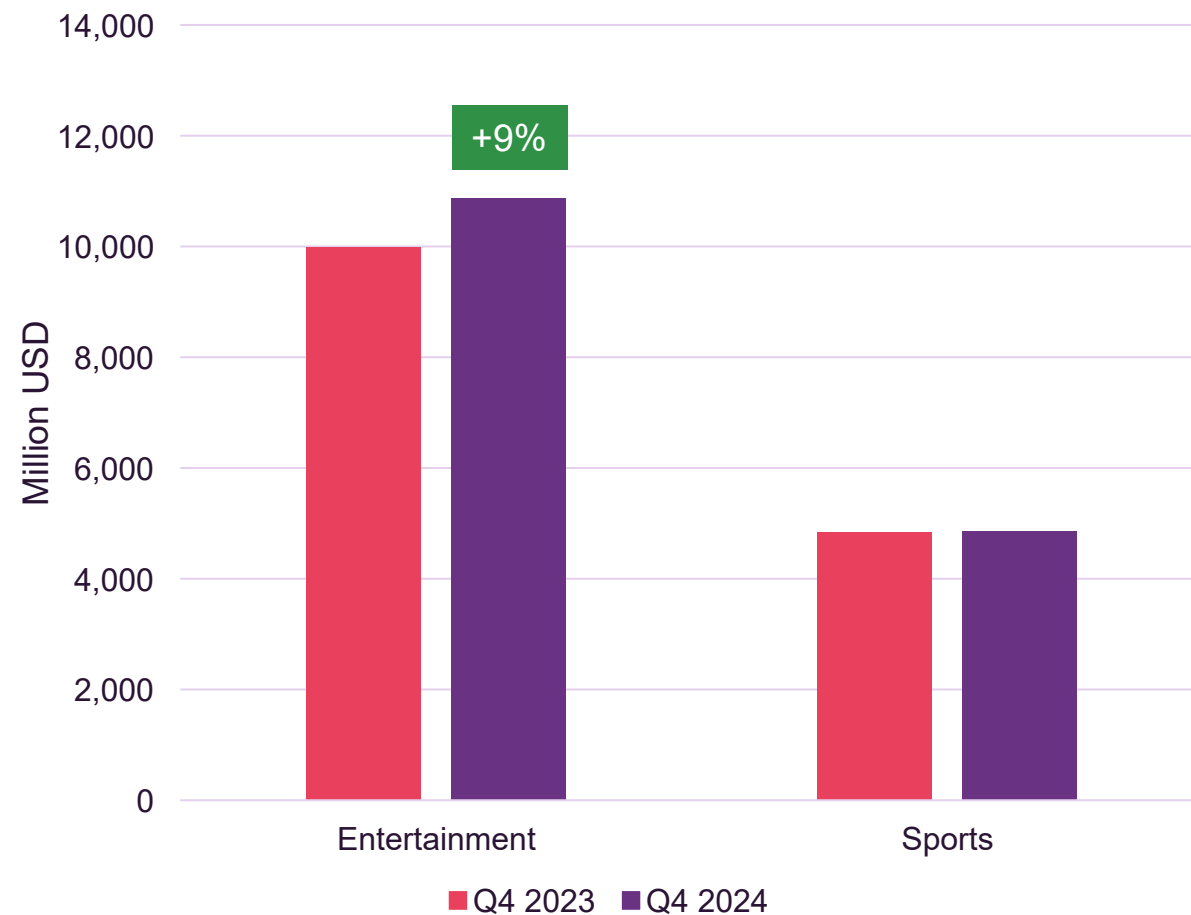
ESPN+ average monthly revenue per paid subscriber increased due to increases in pricing by 10% (from \$9.99 to \$10.99) in October 2024 and higher advertising revenue.

\*ESPN represents the combination of ESPN and ESPN+

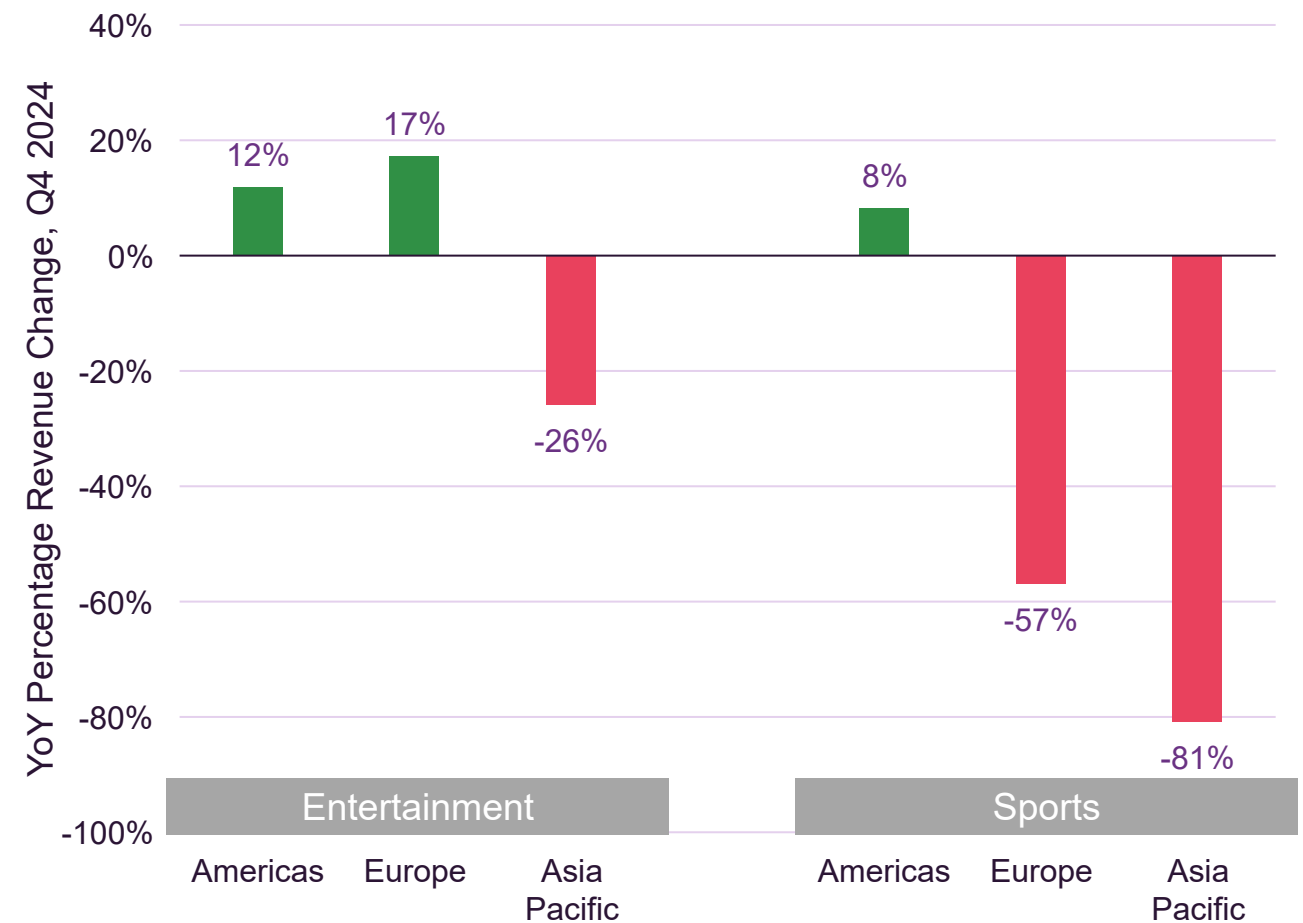
# Media Business Models

Price increases lead to growing direct to consumer operating income

Disney's Revenues

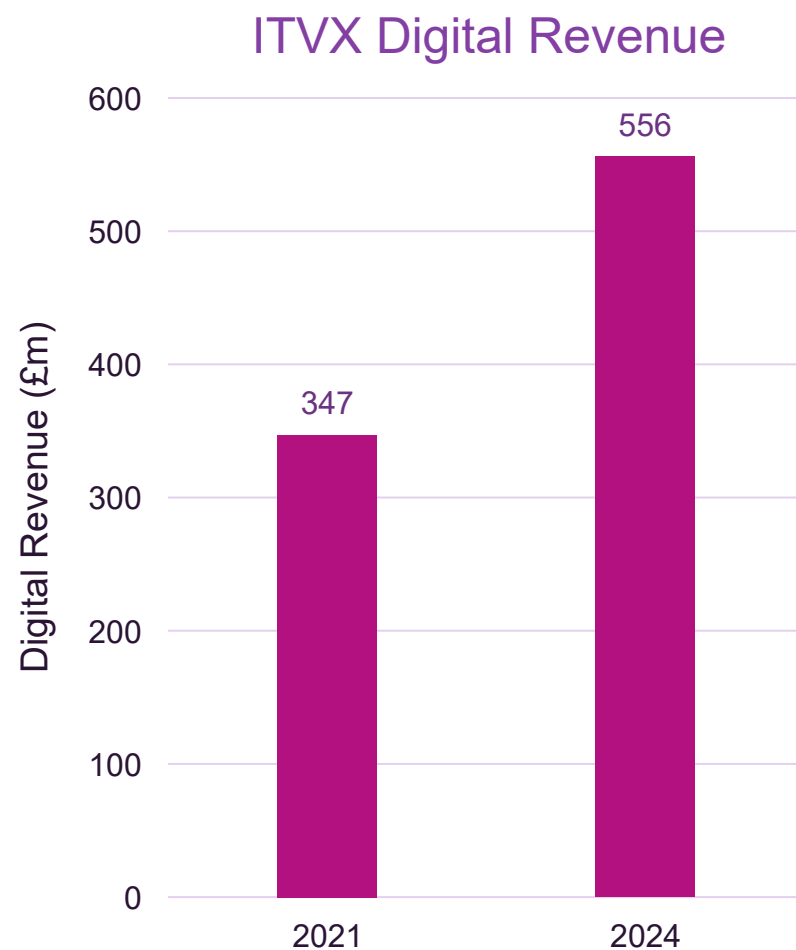


Disney's YoY % Revenue Change, Q4 2024



# Media Business Models

Media companies execute on redefining what it means to be a broadcaster



**Streaming Strategy Growth**

ITVX streaming platform and Planet V programmatic advertising platforms launched in 2022 have delivered a strong rise in digital viewing and revenue

**Goals Hit Ahead of Plan**

Incremental digital revenues exceeded incremental ITVX costs two years ahead of plan. Less was invested than original budget due to “optimization of content spend and efficiencies in technology spend”.

# Media Business Models

## Operational transformation pays off for ITV Studios registering record profits

Media company statement on year end results

*ITV Studios has delivered record profits this year, despite the one-off impact of the writers and actors strike and a softer demand from free-to-air broadcasters, which reflects the strength, scale, diversification and creativity of ITV Studios production companies across the world. ITVX has been the UK's fastest growing streaming platform over the last two years and coupled with our programmatic advertising platform, Planet V, has delivered significant growth in both digital viewing and revenues and is providing attractive returns. Our efficiency programme has delivered savings which have funded growth investments, offset inflation and improved our margins.*

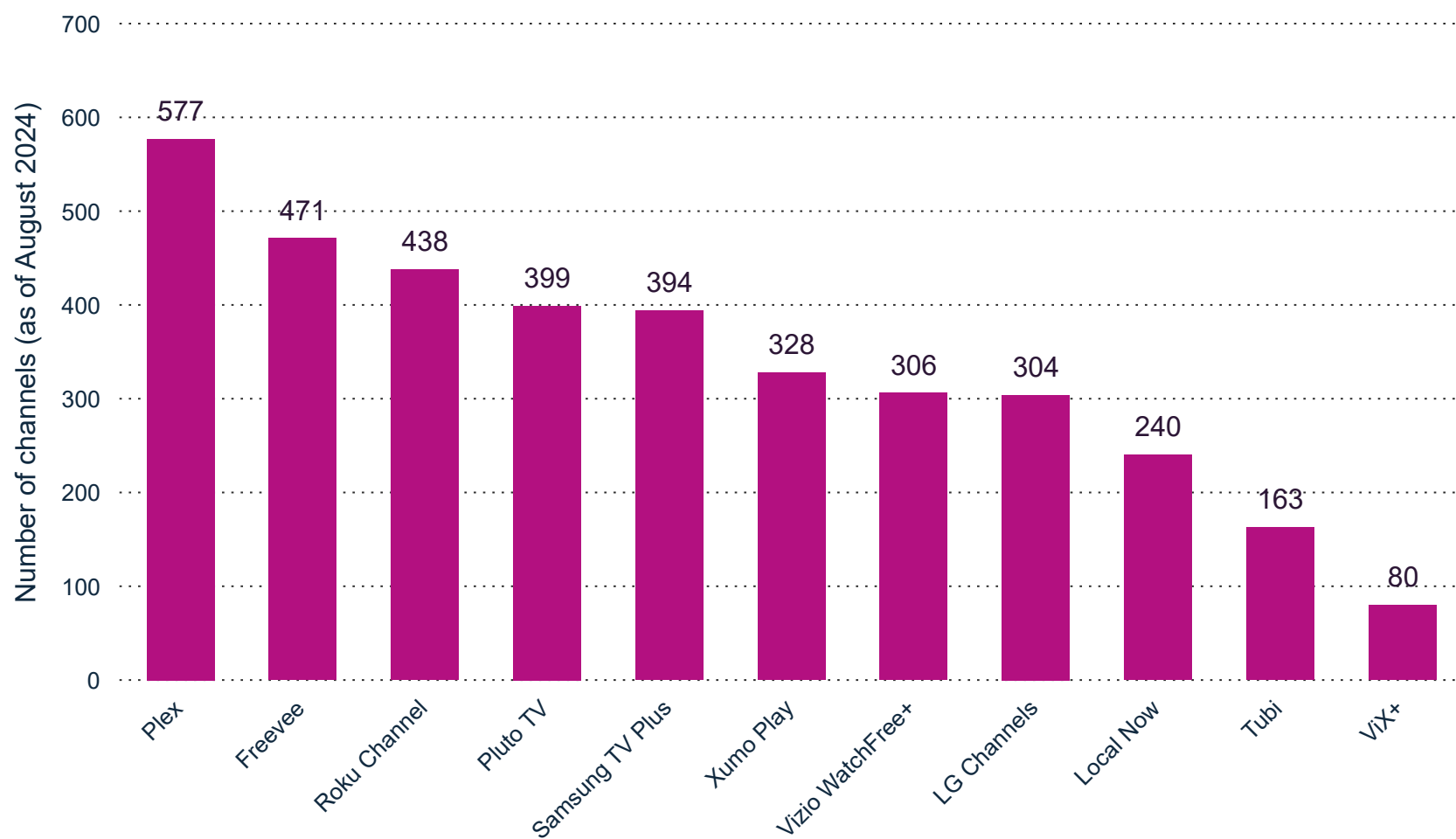
**Carolyn McCall**  
**Chief Executive at ITV**  
(March 2025)



# Media Business Models

Availability of FAST rises as the channel count of major platforms grows

Total Number of Channels on Selected Free Ad-Supported Streaming TV Platforms (USA)



## FAST Channels Proliferate

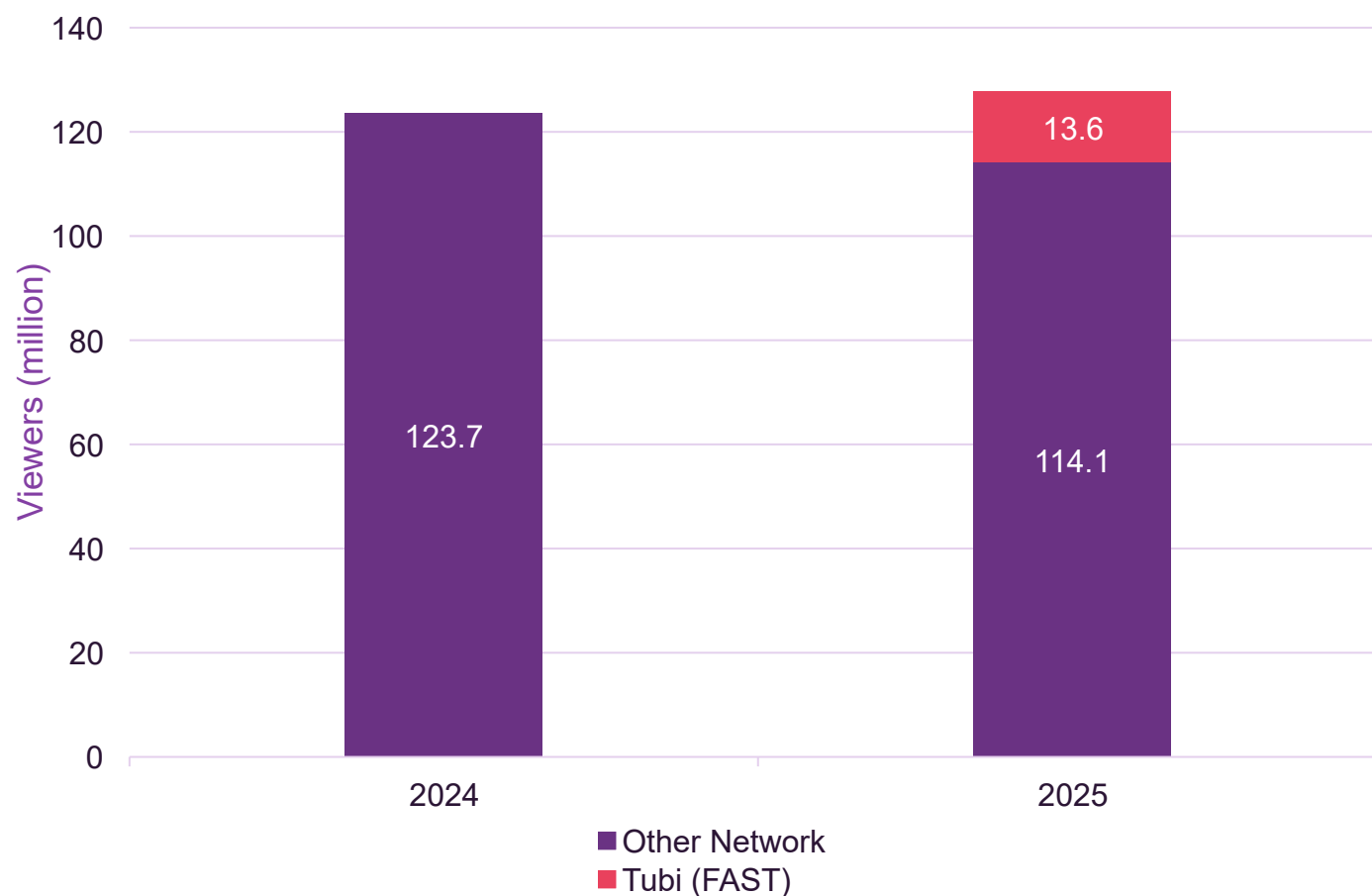
Reintroducing the lean-back experience of linear as FAST channels has given viewers an alternative to the decision-making paralysis of choosing what to watch on-demand.

As the volume of services available in the US grows, quality of service, as well as content discovery and recommendation will become vital to success.

# Media Business Models

Superbowl is available free to air for the first time on FAST

Annual Superbowl Viewership



## Superbowl debuts on FAST

Tubi adds an additional 13.6m viewers to the Superbowl audience total in 2025

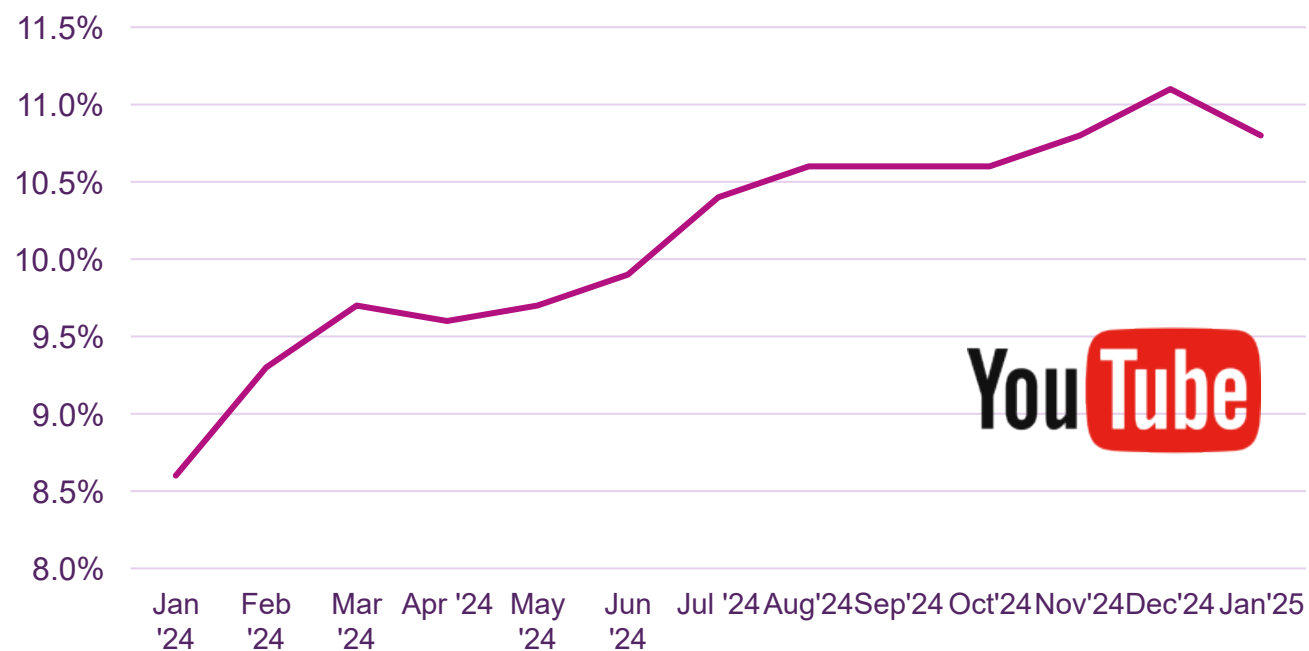
Available across FOX, FOX Deportes, Telemundo, and Tubi, Super Bowl LIX drew a total audience of 127.7million.

Tubi accounted for 11% of the total audiences and supported overall YoY growth by 3.2%

# Media Business Models

## YouTube increases its share of living room viewing

YouTube's share of viewing on US TVs



Morgan Stanley Technology,  
Media & Telecom Conference

*YouTube is now becoming the new TV. It's the number one streamer in the US, [...] in terms of watch time for two years now. And you're seeing that increase in TV. People now are sitting [...] in their living room and watching YouTube.*

Anat Ashkenazi  
Chief Financial Officer & Senior Vice President at  
Google  
(March 2025)

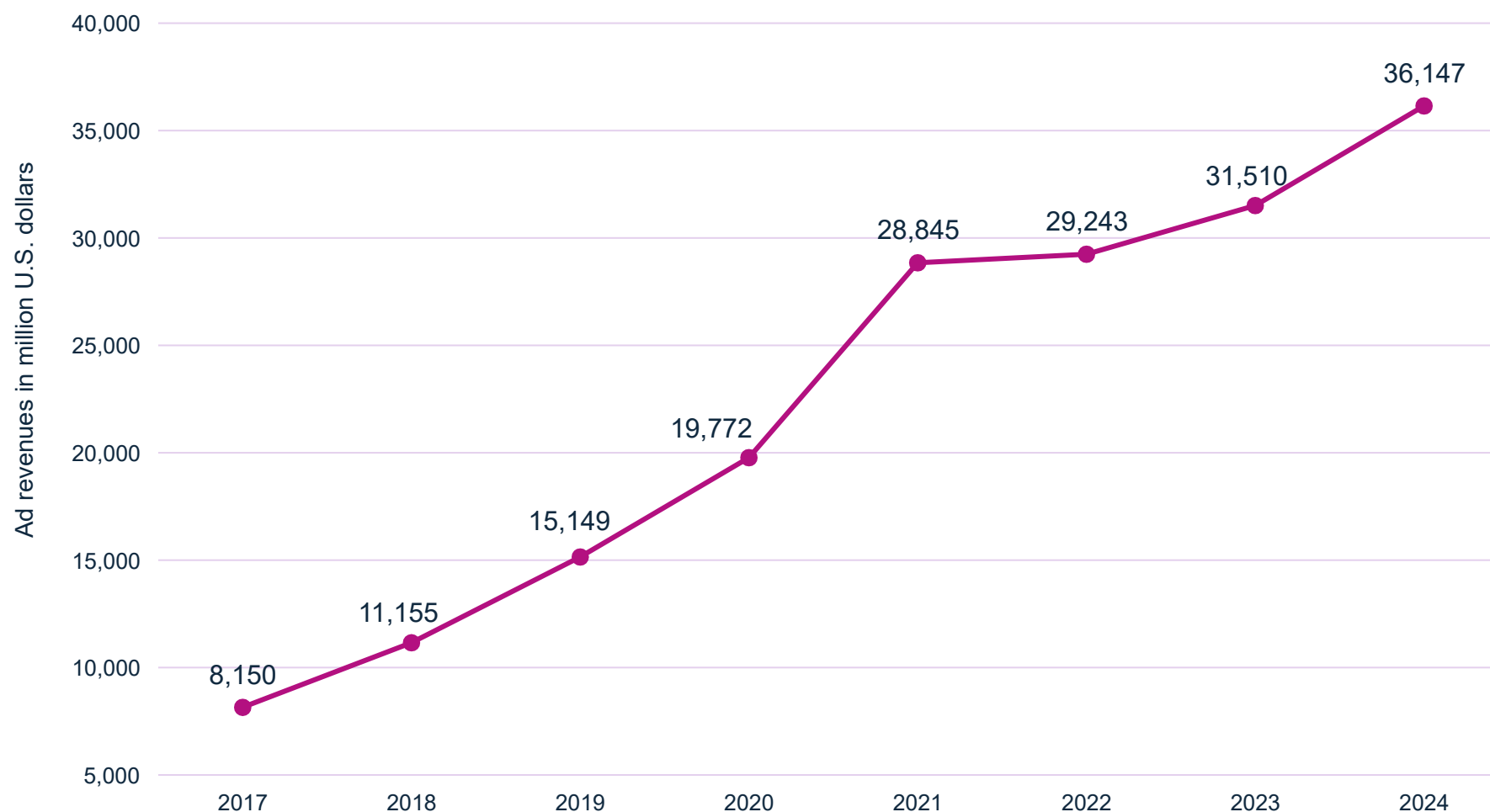
**#1** YouTube maintained its position as the leader in U.S. streaming watch time, surpassing the 10% mark of total TV usage.

**17%** Google's AI-powered video campaigns on YouTube delivered 17% higher return on ad spend (ROAS) compared to manual campaigns

# Media Business Models

Shorts are driving up the rate of YouTube’s advertising revenue growth

YouTube Annual Ad-Revenue



90B

Daily views averaged by YouTube Shorts in 2024 up from 30billion in 2023



\$18.5B

Ad revenue earned by TikTok in 2024



# Media Business Models

Multidevice and platform strategy is critical to retain advertising revenue

Selected quotes from technology organizations

*Our users are accessing our products and services via diverse devices and modalities beyond traditional desktop, such as smartphones, wearables, connected TVs, and smart home devices, and want to be able to be connected no matter where they are or what they are doing. We are focused on expanding our products and services to stay in front of these trends.*

Alphabet Inc.  
(2024 Annual Report)

**Alphabet**

*Globally, devices and connections are growing faster (10% CAGR) than both the population (1% CAGR) and the Internet users (6% CAGR). This trend is accelerating the increase in the average number of devices and connections per household and per capita. Each year, various new devices in different form factors with increased capabilities and intelligence are introduced and adopted in the market.*

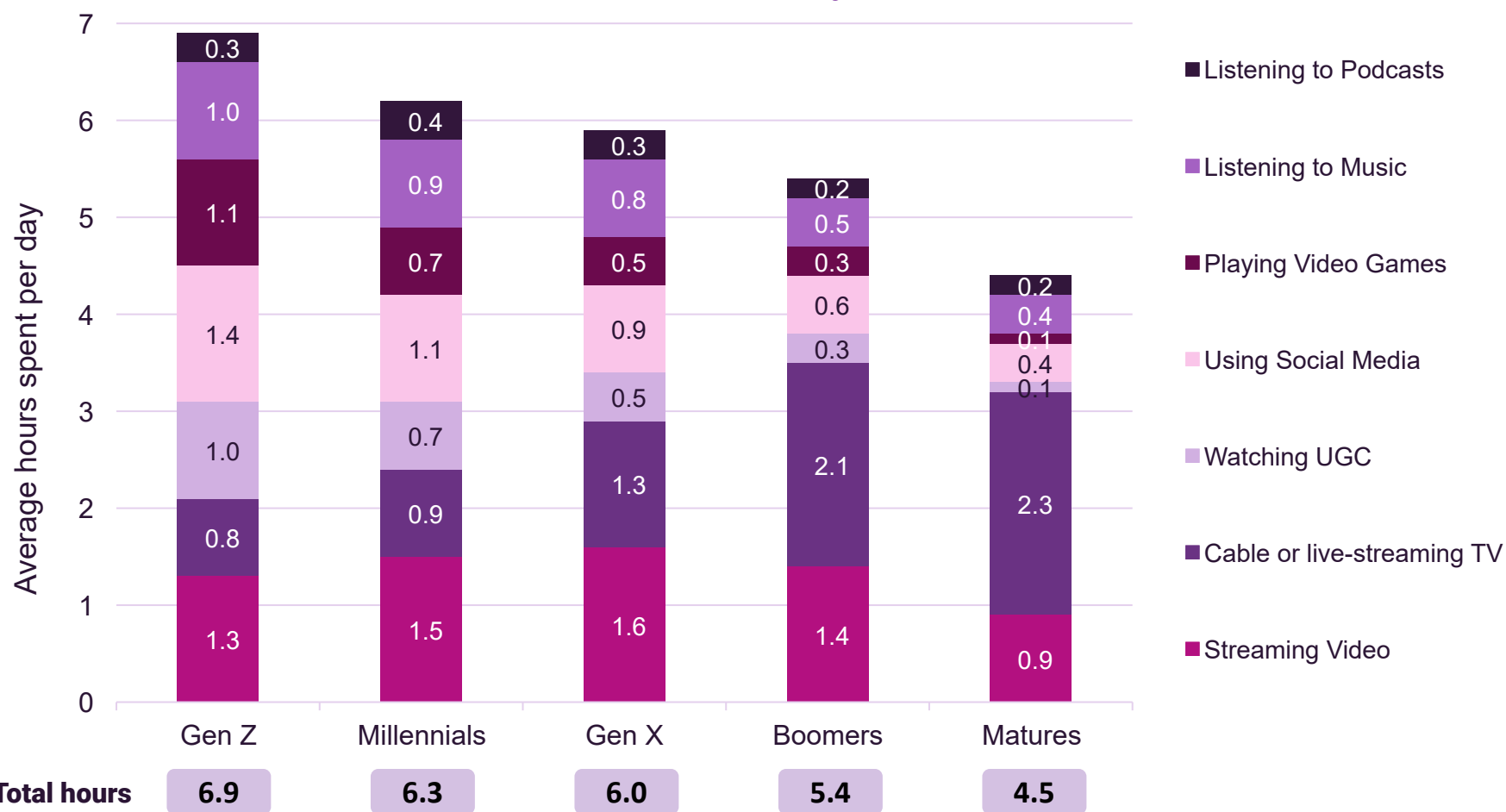
Cisco  
(Cisco Annual Internet Report 2018-2023)

  
**CISCO**

# MediaTech Convergence

Using social media accounts for the largest share of entertainment activity for Gen Z

Daily Average Hours of North American Media and Entertainment Activities by Generation



## New Habits Grow Total Daily Average Hour

Average daily media consumption increases by generation. Time spent playing video games accounts for the greatest increase between Gen Z and Millennials.

## Gen X, Boomers, Matures

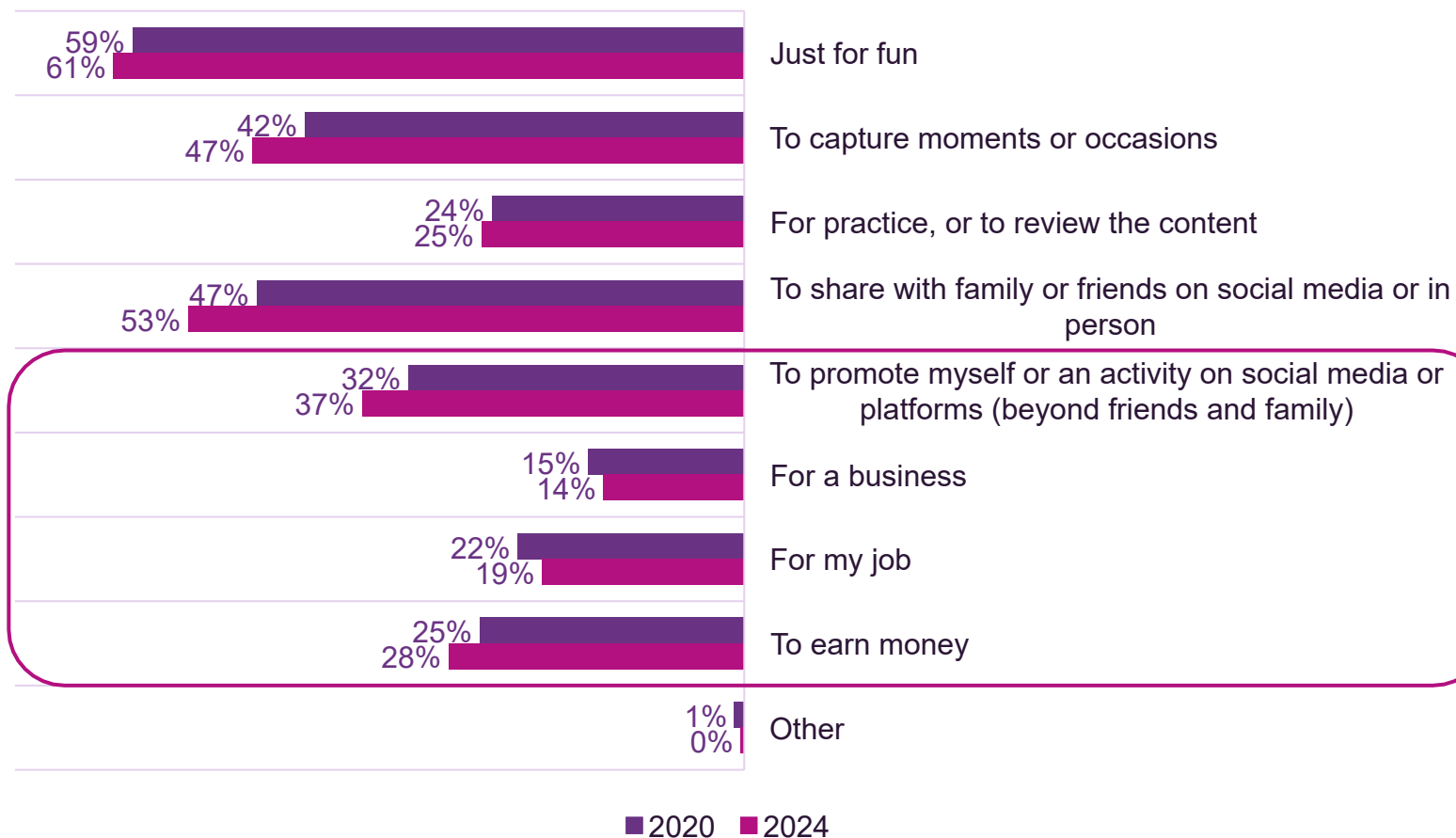
Older generations watch more video on average per day in total across platforms.

Please note the "other" activity category (accounting for 0.1 hour on average) has been excluded from the chart.

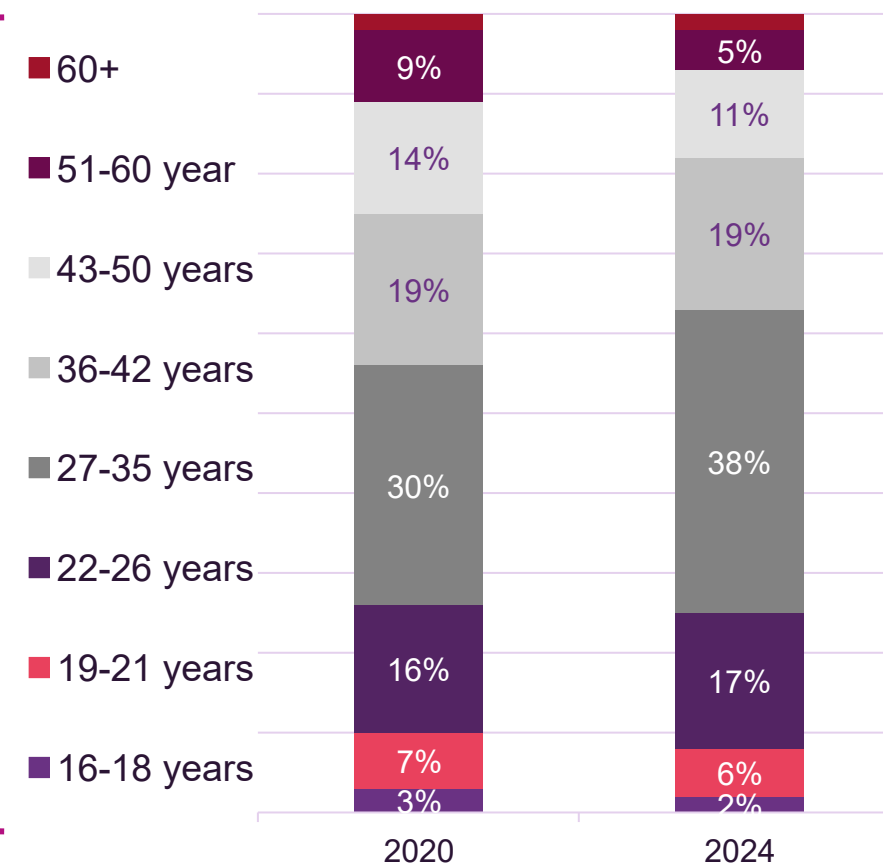
# MediaTech Convergence

## Average age of video content creators rises as creator economy matures

Creators' reasons to create stream or edit videos



“Professional” content creators by age range

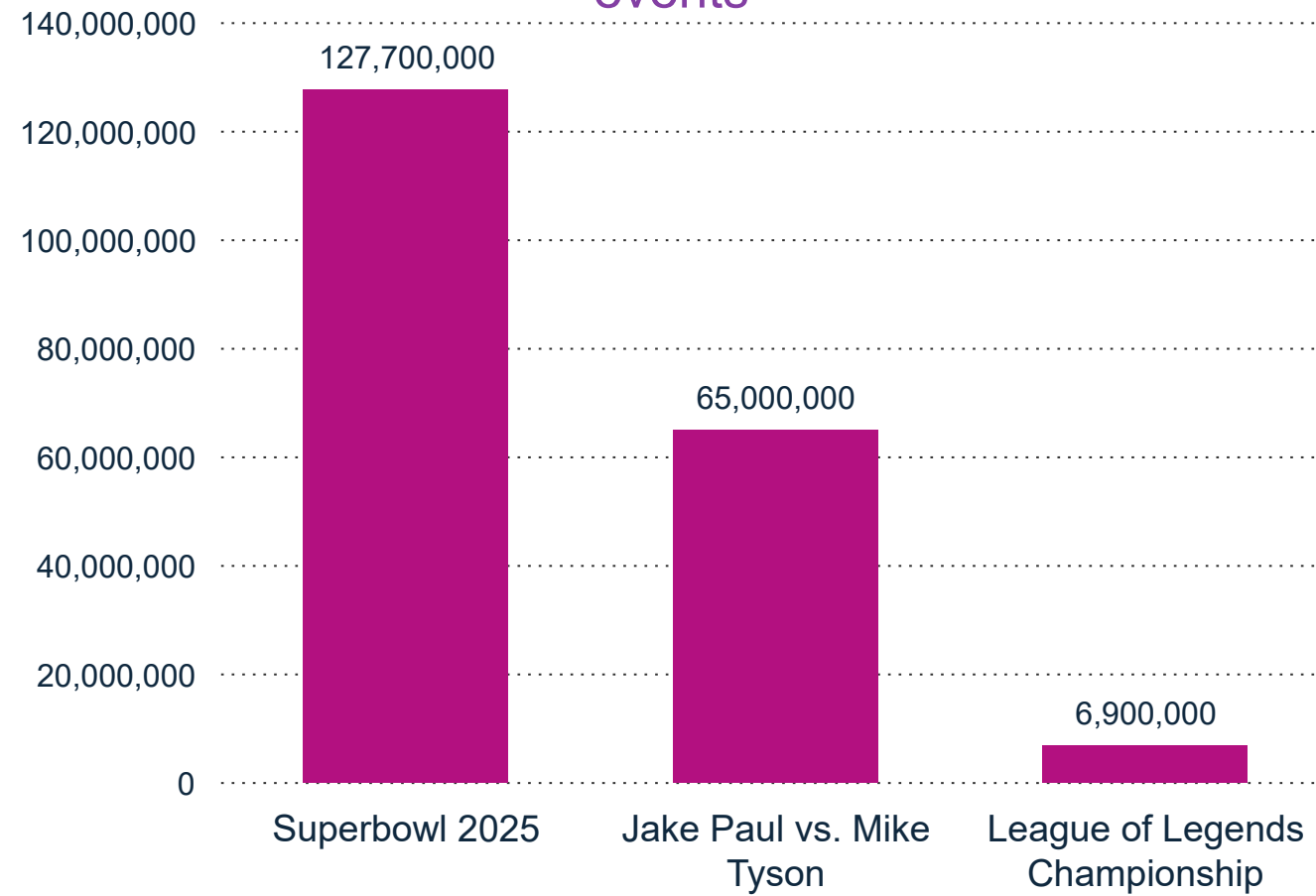


Q. Why do you create stream or edit videos? (2020 n=17270; 2024 n=16,663) Primary research was conducted in eight selected countries,

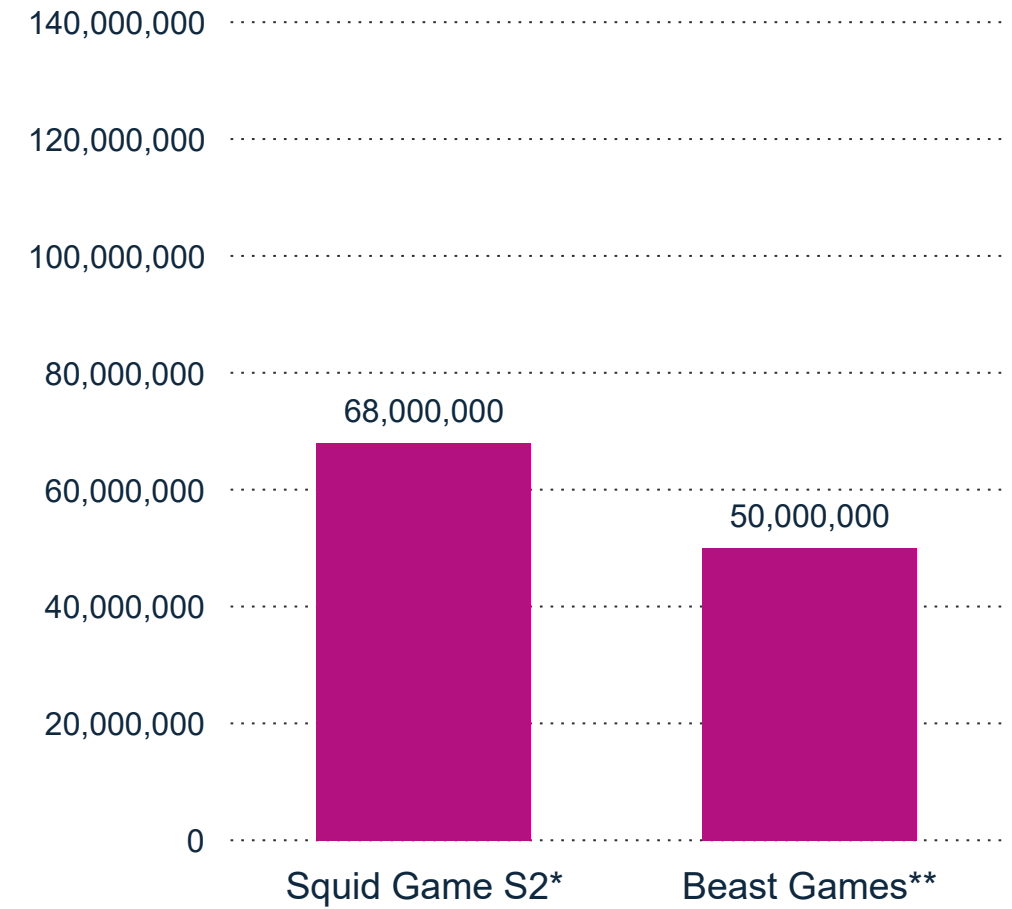
# MediaTech Convergence

Creator led-content delivers promising results for streamers in 2024

Viewership comparison of selected live sports events



Viewership comparison of selected on demand streaming originals



\*Netflix reported 1 premiere week total

\*\*Amazon reported 25 day total

# Business Environment

Held over impact of strikes limits 2024 box office total, yet Q4 achieves record best

Box office revenue in North America



**Battling the Content Gap**

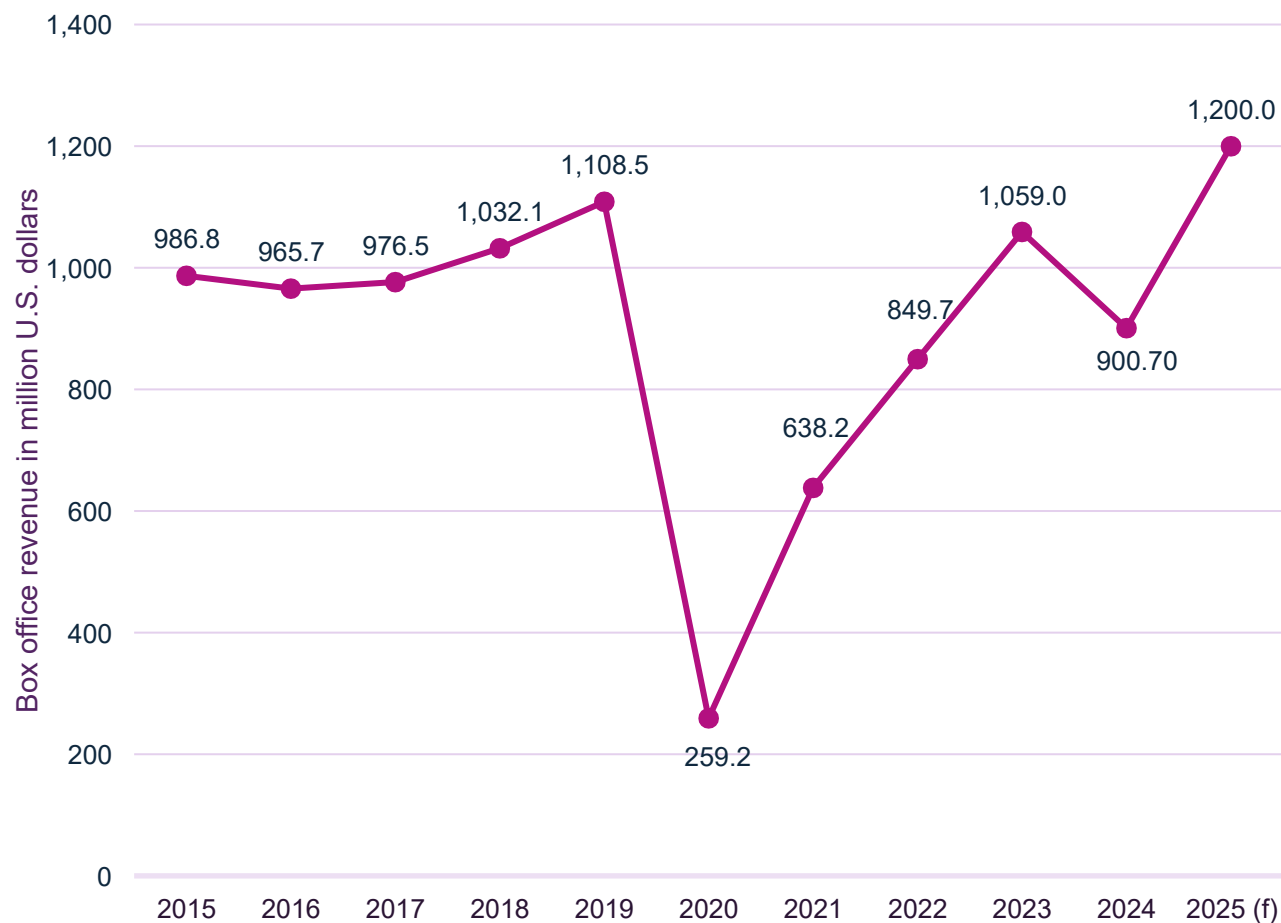
Q4 2024 box office registers a resurgence due to a broad range of complementary feature length titles releasing that pull a variety of different demographics into cinemas.

Q1 2025 box office performance falls YoY with studios slates still suffering from shortage of product in the wake of supply chain delays resulting from the 2023 WGA and SAG-AFTRA strikes.

# Business Environment

Immersive spectacle can transition cinema visits into an event experience

Worldwide IMAX Corporation Box Office Revenue 2015-2025



**\$1.2b**

IMAX CEO forecasts record revenues in 2025 after decline attributed to shortfall in titles, a hold over impact from the 2023 Hollywood strikes disrupting supply.

**1,000**

IMAX screens booked for exclusive theatrical run

Pivoting cinema visits to immersive and experiential activity allows them to complement at-home viewing. Netflix agrees a two-week exclusivity deal for IMAX distribution of 2026 Narnia film.

*In the case of Narnia, it's a two-week special event. I think it's very differentiated from other runs because I doubt anyone has a screen as big as an IMAX screen at home.*

Ted Sarandos  
Co-CEO at Netflix  
(January 2025)

# Business Environment

Lack of unity on studios' post pandemic theatrical strategies is causing confusion

Cinema United association interview with  
The Hollywood Reporter

*The current situation is one where there's a lot of uncertainty out there. It's causing confusion among movie fans. They don't know if a movie is going to be in the home in two weeks, or is it going to be in six weeks? And in essence, what we're doing is we're cannibalizing both. And I do think that we need to look at the windows. Theatrical exclusivity has been critical to the success of this industry [...] Things are settling down now after the pandemic, and we need to put a structure in place that creates certainty for consumers and for exhibition. We're kind of clinging to pandemic policies that maybe don't apply as much now.*

**Michael O'Leary**  
**CEO at Cinema United**  
(March 2025)



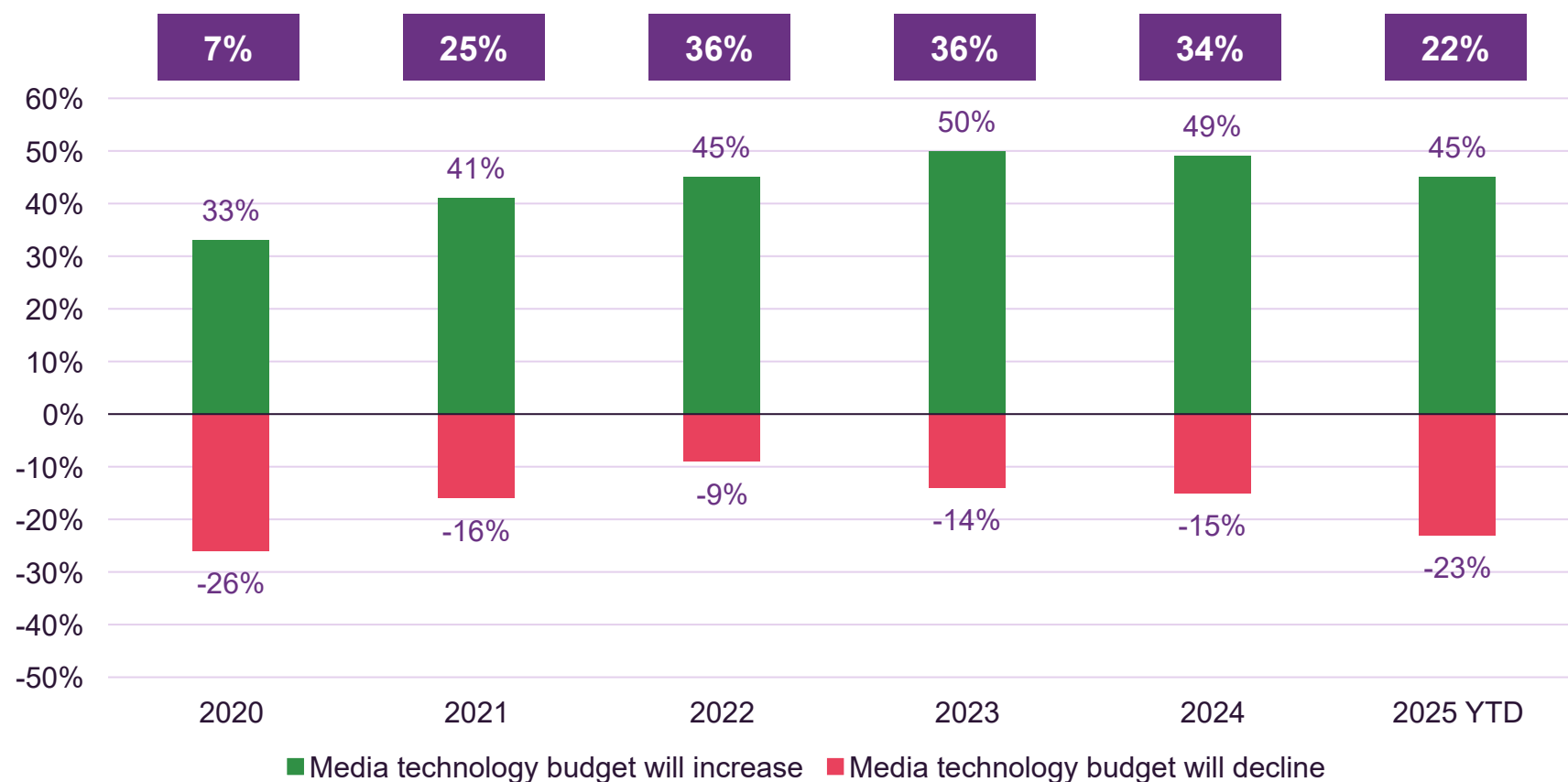
# MediaTech Investment

Key drivers of change in 2025 and beyond

# MediaTech Investment

Investment is expected to be more conservative in the year ahead

MediaTech NET investment outlook at media and production companies



**MediaTech Budgets**

Fewer MediaTech organizations expect to see an increase in their spending in the year ahead compared to respondents last year.

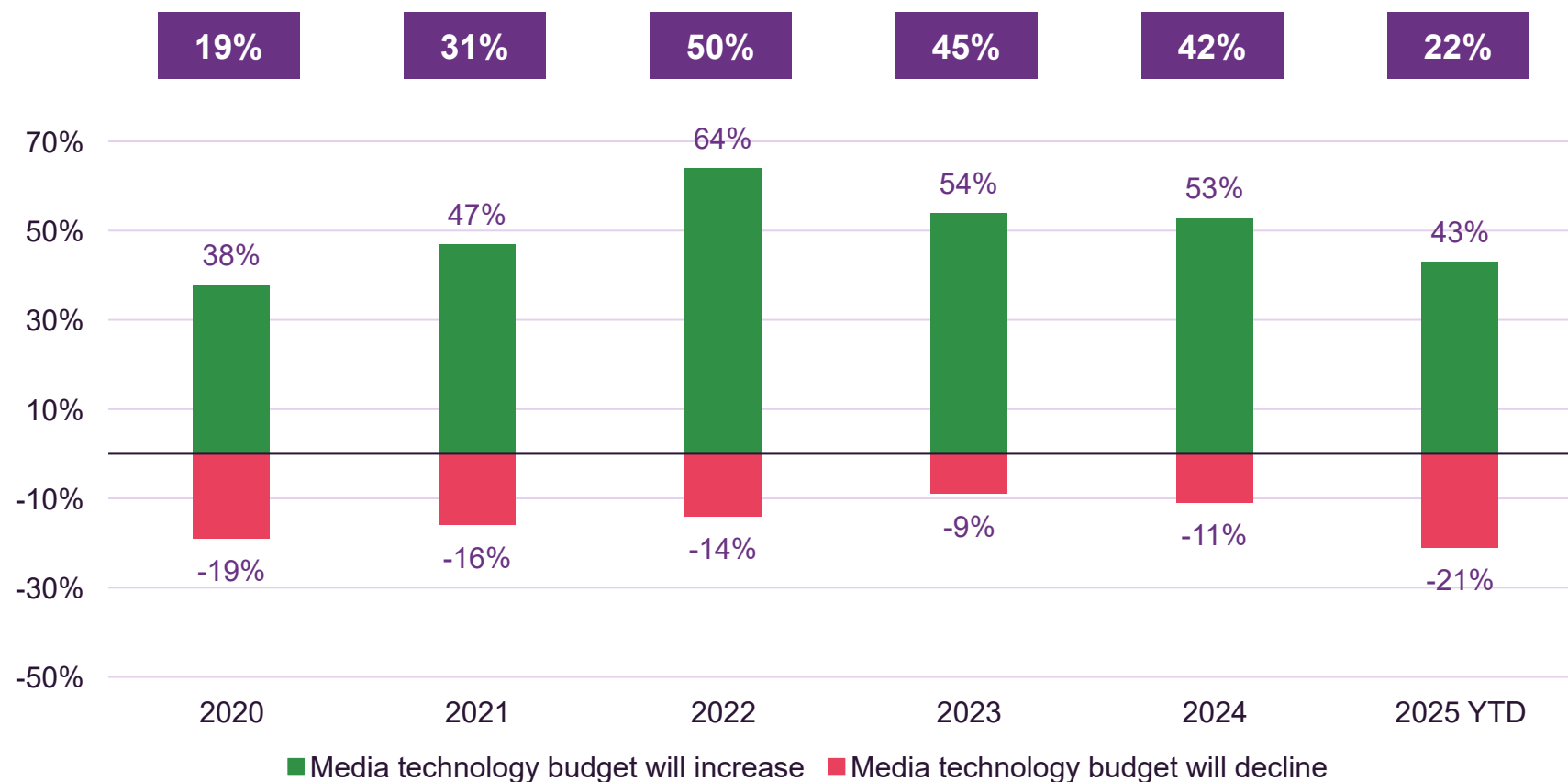
Although NET investment has fallen by 14% points, a positive NET result still indicates that a greater number of respondents expect to see an increase in investment in the coming year than the number that anticipate a decrease.

Q. What is your organization's outlook for the overall business environment over the next year? (Media/production companies)

# MediaTech Investment

North American investment shows a steeper decline compared to the global trend

MediaTech NET investment outlook at media and production companies



**MediaTech Budgets**

The proportion of positive responses from North American respondents decreased by a greater margin than the overall total sample.

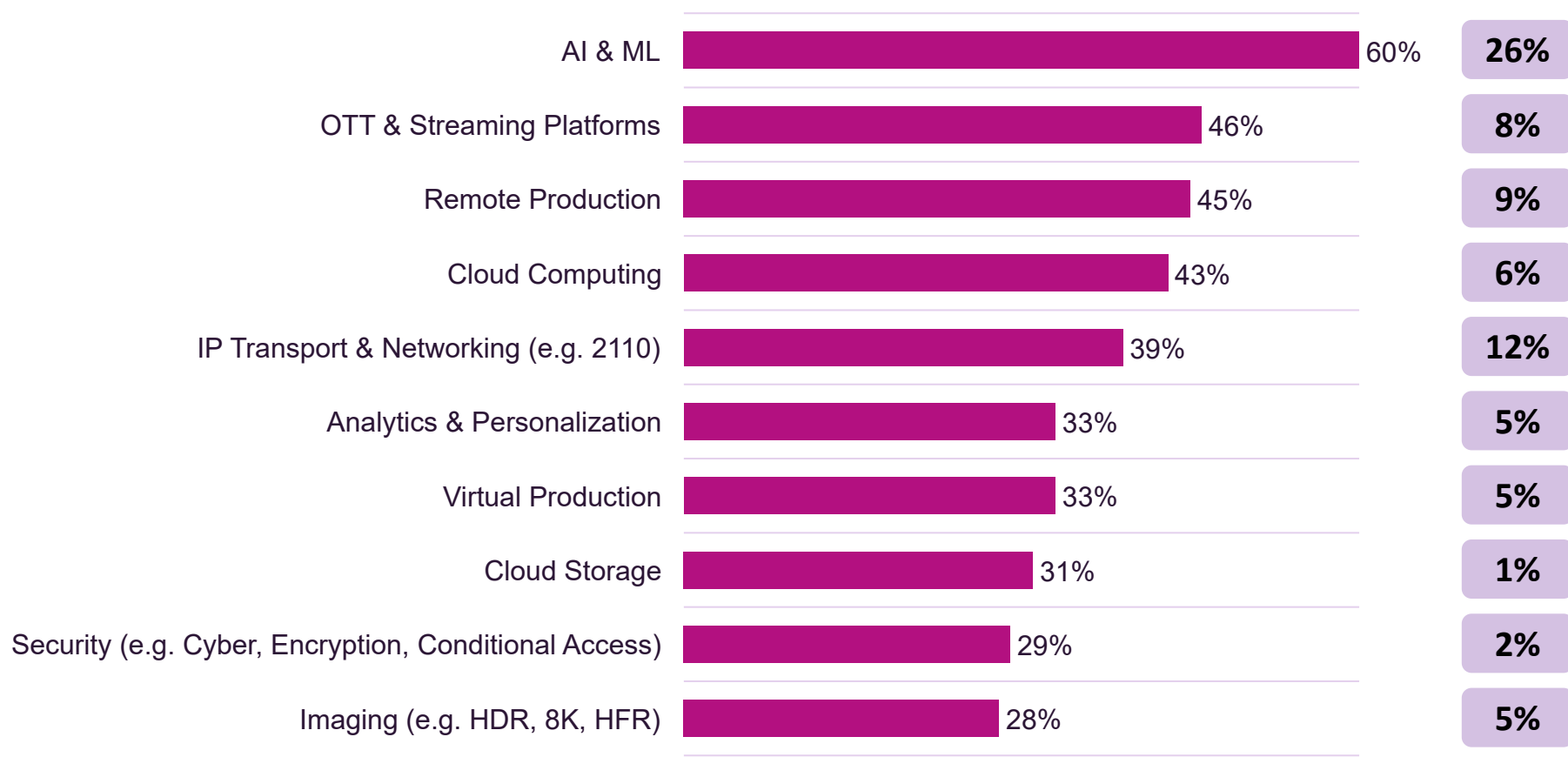
Q. What is your organization's outlook for the overall business environment over the next year?

# MediaTech Investment

AI continues to grow, maintaining its position as the main priority in tech roadmaps

Technology Roadmap Priorities (Top10)

Main Priority



**Artificial Intelligence**

AI & ML dominates as the top priority in technology roadmaps, followed by OTT & streaming platforms, remote production and cloud computing.

IP transport & networking ranks among the five most important trends in technology roadmaps. IP transport & networking ranks second when respondents were asked to pick only their main priority — this represented a third of all respondents that cited it as one of the most important technology trends.

Q. What are the most important trends in your organization's technology roadmap? (n=150)

# MediaTech Investment

AI & ML has risen to become the most important MediaTech roadmap trend

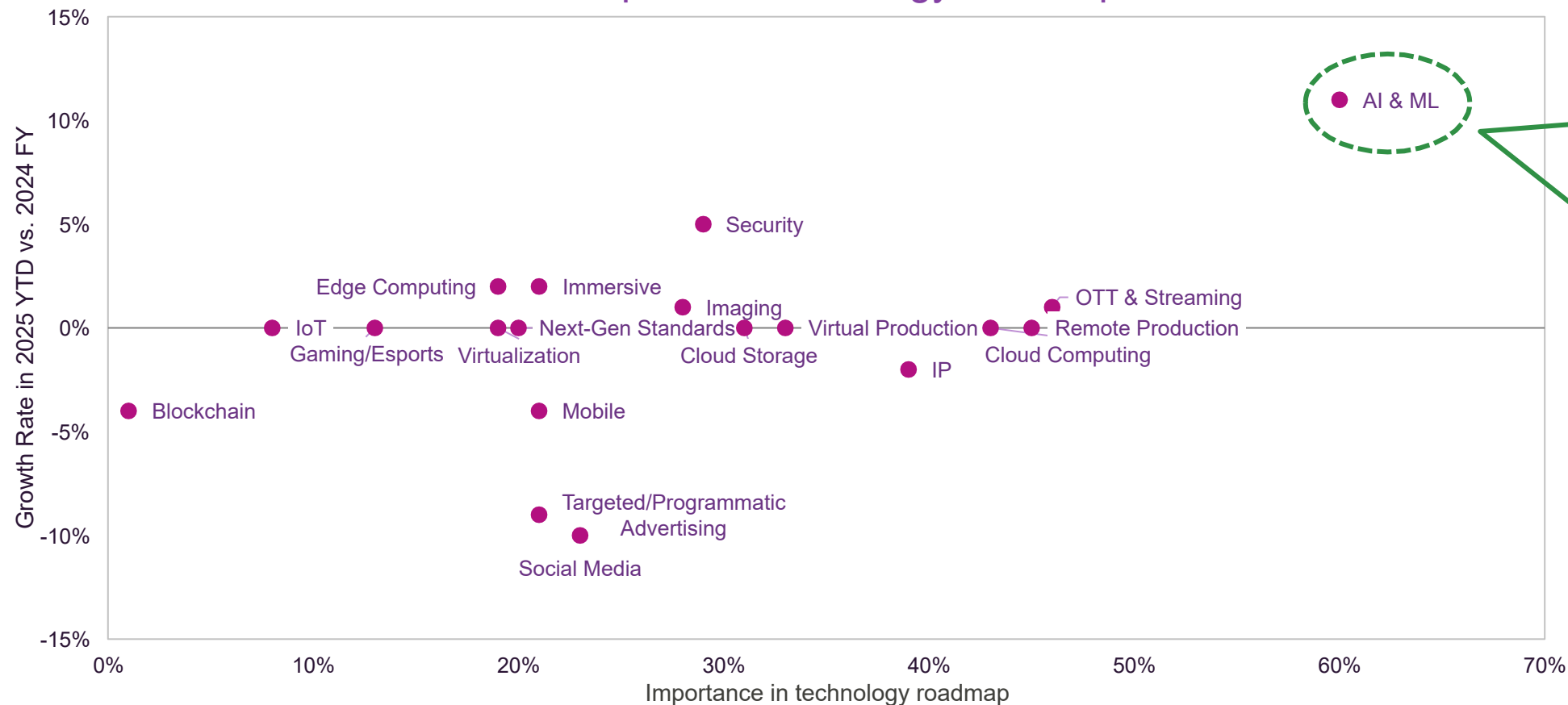
Rank	2024		2025 YTD			
1	Cloud Services & Virtualization	59%	AI & ML	60%		
2	AI/ML & Analytics	49%	OTT & Streaming	46%		
3	OTT & Streaming	45%	Remote Production	45%		
4	IP Transport & Networking	41%	Cloud Computing	43%		
5	Social Media	Virtual Production	33%	IP Transport & Networking	39%	
6	Targeted/Programmatic Advertising	At-Home/Remote Production	30%	Analytics & Personalization	Virtual Production	33%
7	Imaging	27%	Cloud Storage	31%		

Q. What are the most important trends in your organization's technology roadmap? (2024 n=230, 2025 n=150) "Cloud Computing", "Cloud Storage", and "Virtualization" were added as separate options in 2025 to replace "Cloud Services & Virtualization", while "Remote Production" was revised from "At-Home/Remote Production". "AI & ML" included Analytics in 2024.

# MediaTech Investment

AI has become the top investment priority due to its rapid growth

Media companies' technology roadmap



Media companies continue prioritizing investments in AI.

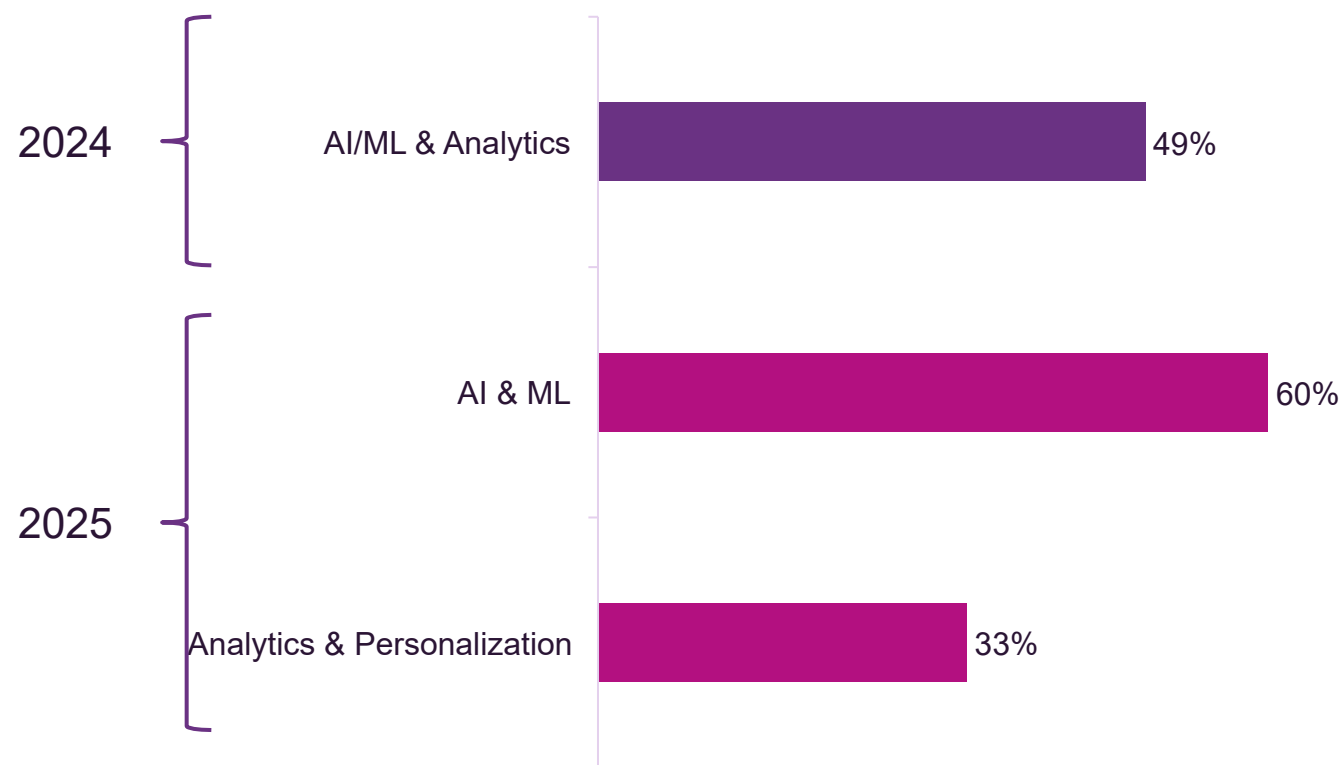
Additionally, there is a growing focus on security.

Q. What are the most important trends in your organization's technology roadmap? (2024 n=230, 2025 n=150) "Cloud Computing", "Cloud Storage", and "Virtualization" were added as separate options in 2025 to replace "Cloud Services & Virtualization", while "Remote Production" was revised from "At-Home/Remote Production," resulting in no changes in 2025 compared to 2024 for all mentioned technologies. "AI & ML" included Analytics in 2024. Newly introduced and revised options have been plotted at "0" on the Y axis as a direct YoY comparison cannot yet be made.

# MediaTech Investment

Areas of technology investment updated to reflect an evolving market

Importance of AI/ML and Analytics & Personalization in Technology Roadmaps



Q. What are the most important trends in your organization's technology roadmap? (n=150)

Sources: IABM

### Survey Update

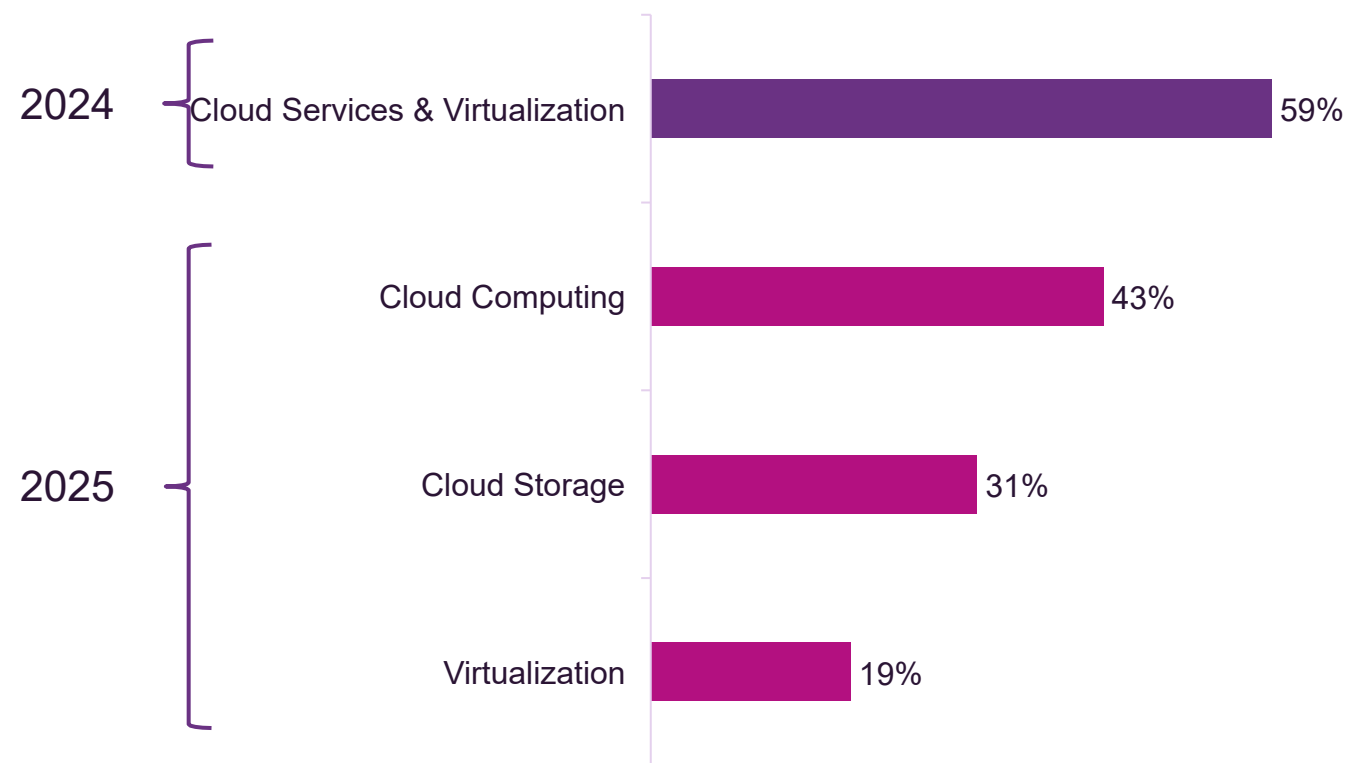
In previous iterations of IABM's MediaTech Industry Tracker Survey, respondents were asked how "AI/ML & Analytics" ranked in their technology roadmaps. As the capabilities of AI/ML expand, it is necessary to separate these technology roadmap answers to allow more granular tracking.

Analytics together with personalization present a developing area of interest that will be tracked independently moving forward to provide additional data insights. This decision has been validated by the new "Analytics & Personalization" option being cited by 33% of respondents.

# MediaTech Investment

Areas of technology investment updated to reflect an evolving market

Importance of Cloud Services & Virtualization in Technology Roadmaps



## Survey Update

In response to IABM Member feedback updates have been introduced throughout the MediaTech Industry Tracker Survey to questions relating to cloud technologies to provide a higher level of accuracy and granularity in the dataset.

The previous technology roadmap option “cloud services & virtualization” has been separated into three distinct options in the 2025 edition of the survey: “cloud computing”, “cloud storage”, and “virtualization” presented as a separate discrete option that does not have to be linked to cloud operations.

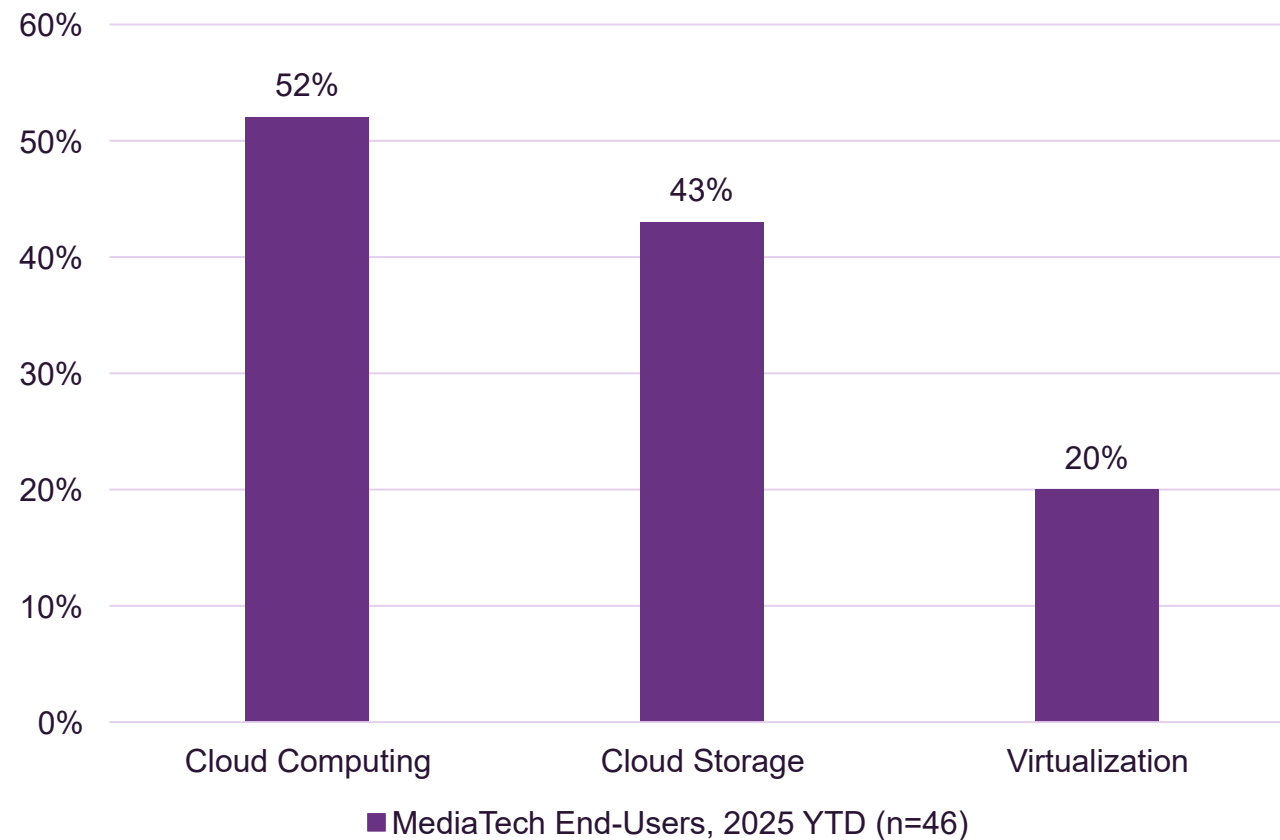
Q. What are the most important trends in your organization's technology roadmap? (n=150)

# MediaTech Investment

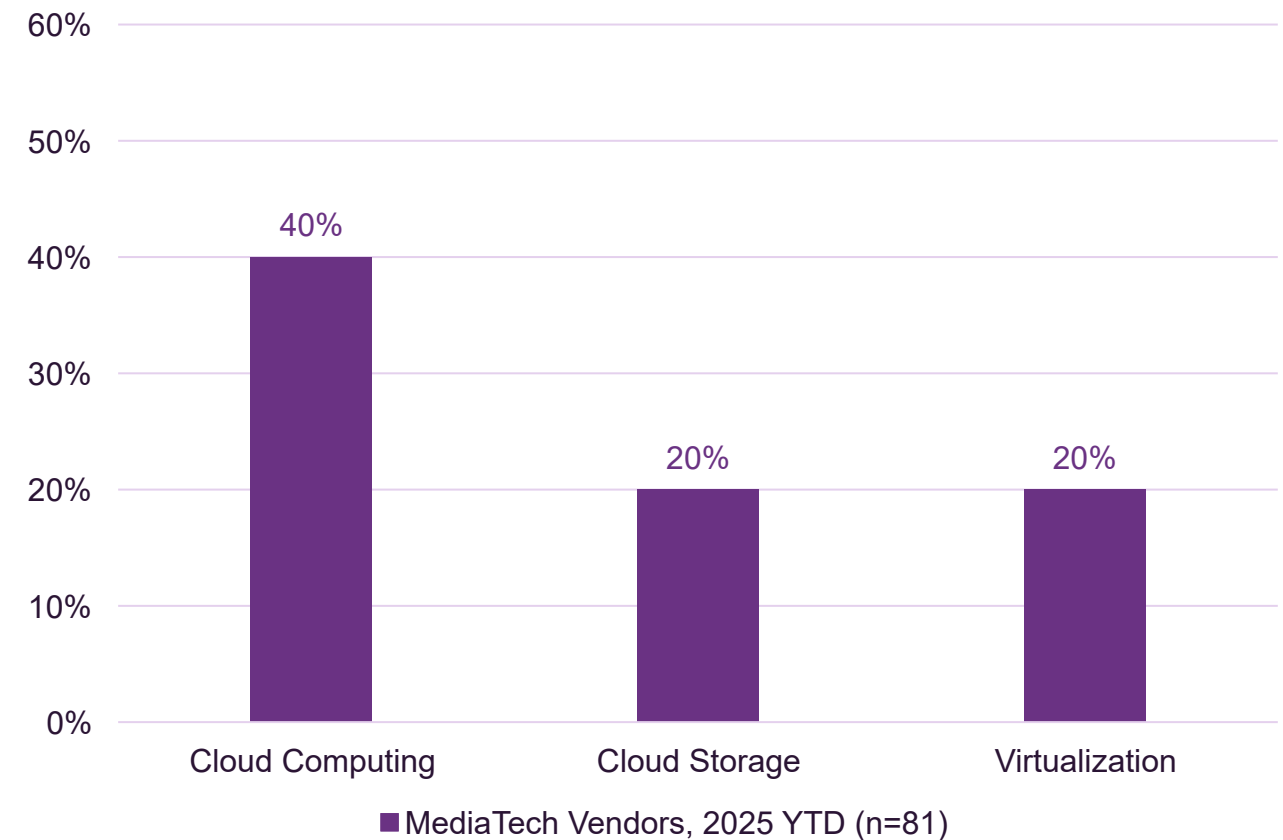
Cloud compute and storage remain important to media buyers' roadmaps



Cloud & virtualization in MediaTech buyers' technology roadmap



Cloud & virtualization in MediaTech vendors' technology roadmap

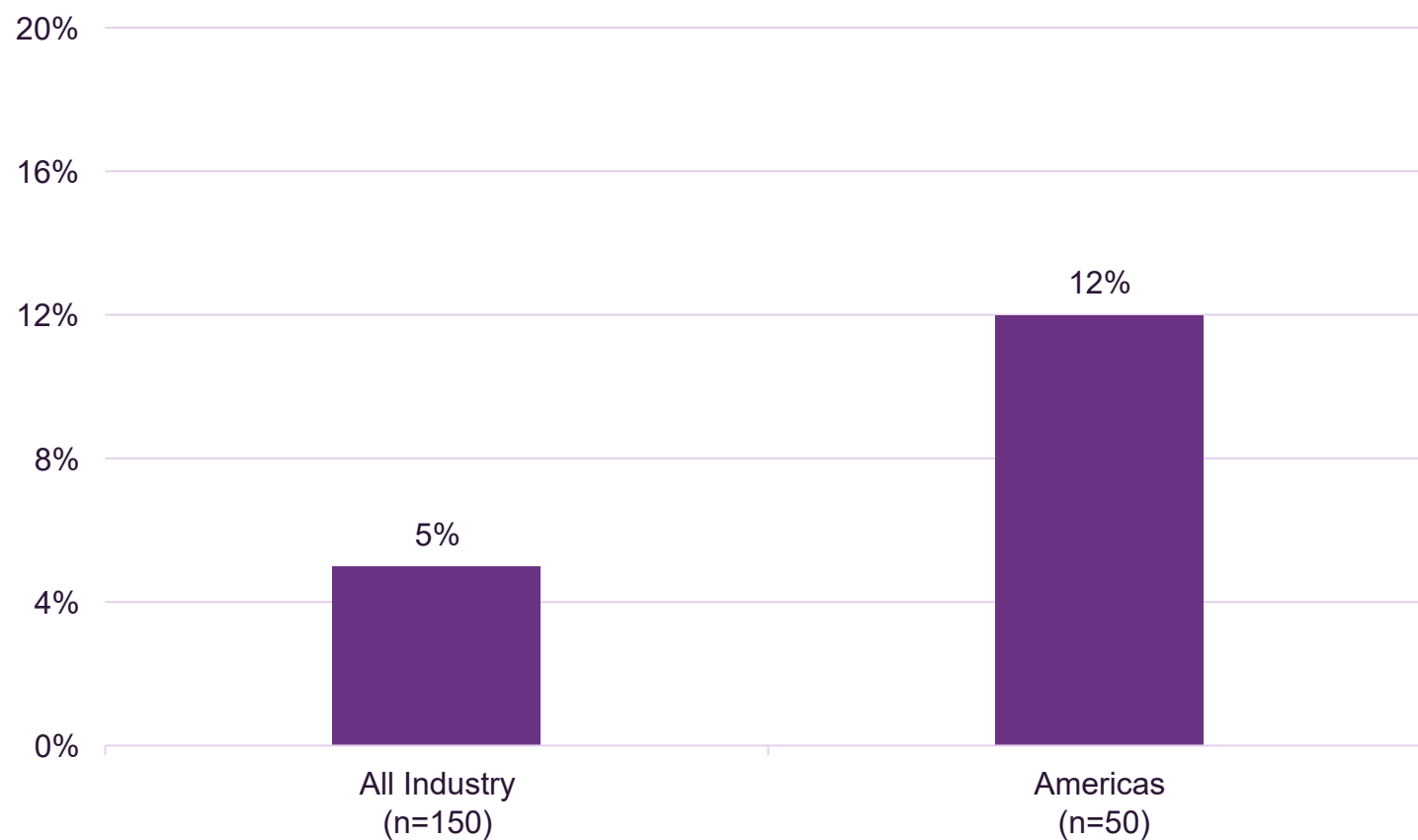


Q. What are the most important trends in your organization's technology roadmap?

# MediaTech Investment

Content authenticity gaining traction in Americas despite low global priority

Provenance & Authenticity in organizations' technology roadmaps (2025 YTD)



Q. What are the most important trends in your organization's technology roadmap?

Sources: IABM

## Survey Update

“Provenance & Authenticity” is a new technology roadmap trend introduced into the IABM Industry Tracker Survey in 2025 in response to increased interest in the topic from the industry.

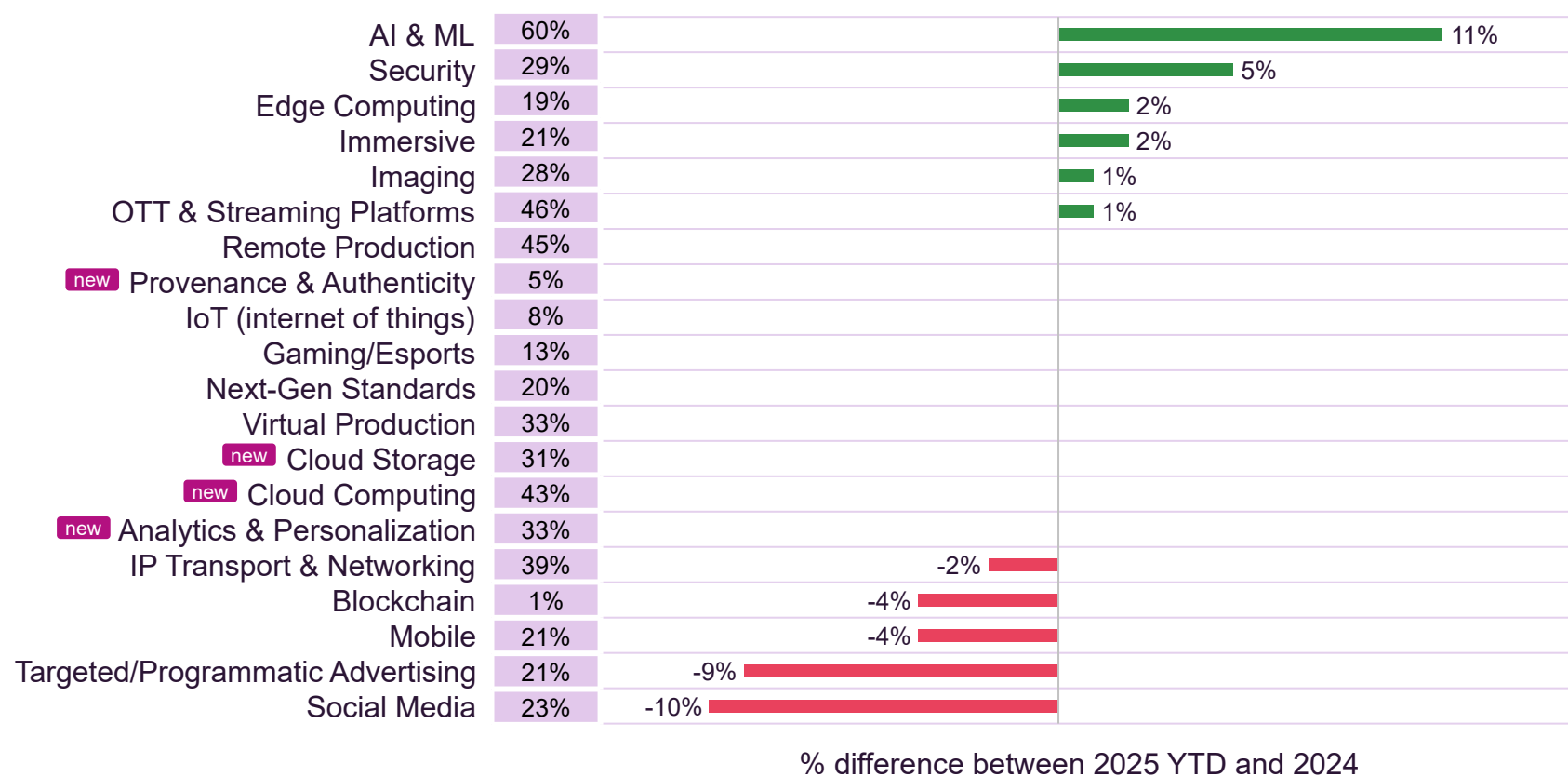
## Combating Misinformation

The advancements in generative AI content creation and wider circulation of synthetic content in mainstream media and social platforms presents an increased need to verify the provenance and authenticity of content both when creating and viewing media.

# MediaTech Investment

Investment focus shifts from social media & ad tech to AI & security in sector's roadmap

MediaTech trends ranking by YoY % point change



The proportion of respondents that consider AI/ML & Analytics to be a priority for investment has risen by 11% points YoY

Edge computing and cloud register a minor decline in the proportion of respondents prioritizing investment

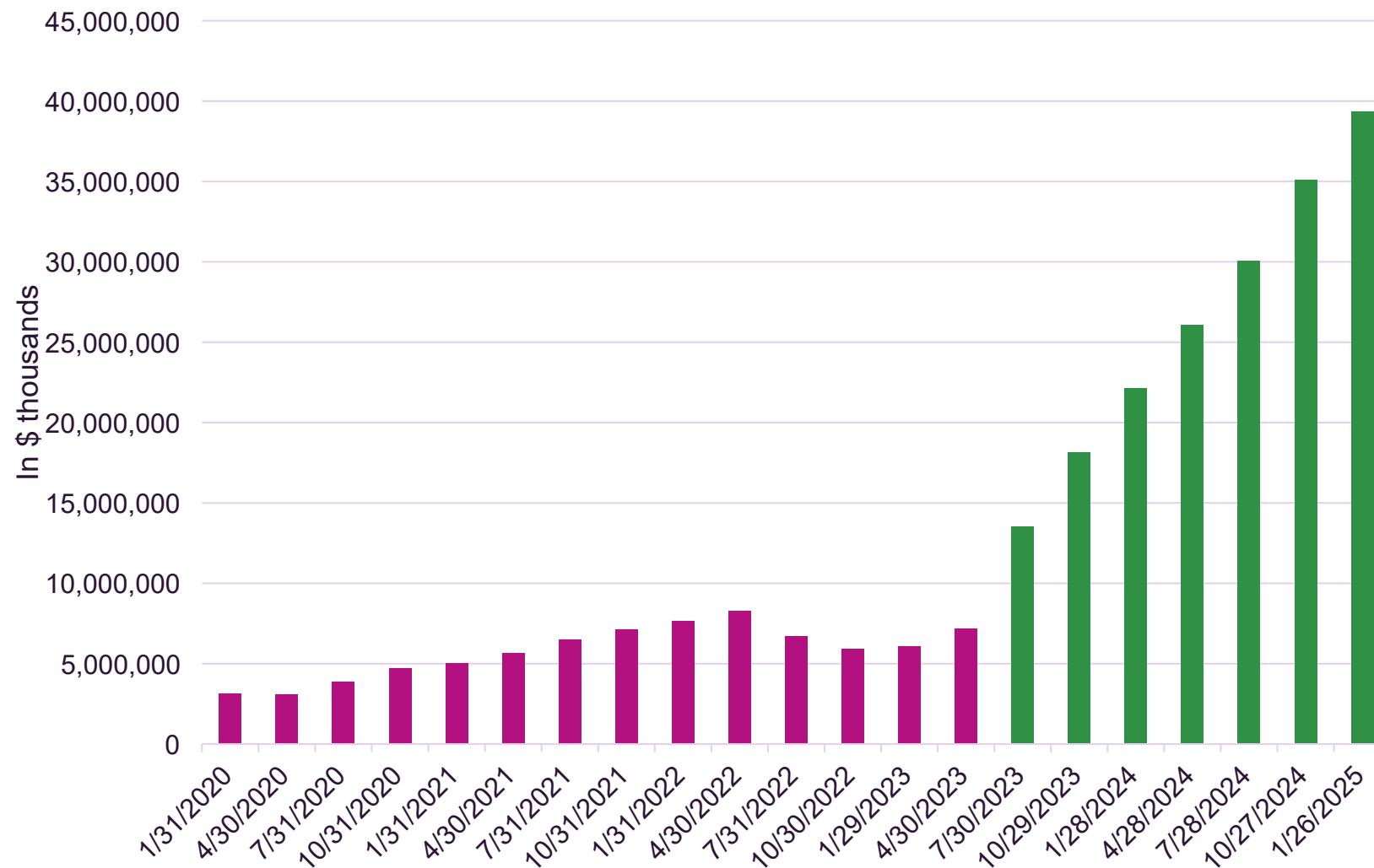
Percentage of respondents who selected each technology among the most important trends in their organization's technology roadmap.

Q. What are the most important trends in your organization's technology roadmap? (2024 n=230, 2025 n=150) "Cloud Computing", "Cloud Storage", and "Virtualization" were added as separate options in 2025 to replace "Cloud Services & Virtualization", while "Remote Production" was revised from "At-Home/Remote Production," resulting in no changes in 2025 compared to 2024 for all mentioned technologies. "AI & ML" included Analytics in 2024.

# MediaTech Investment

Nvidia's revenues continue to skyrocket on the back of rising AI spending

Nvidia quarterly revenue, 2020-2025



## AI Spending

NVIDIA's revenues continue to grow in 2025.

Nvidia's growth is correlated with the rise in AI spending (and particularly Generative AI) as its chips are used to train AI models

# MediaTech Investment

NVIDIA keeps pace with demand as increased investment in AI continues

MediaTech supplier statement on year end results

*We've successfully ramped up the massive-scale production of Blackwell AI supercomputers, achieving billions of dollars in sales in its first quarter. AI is advancing at light speed as agentic AI and physical AI set the stage for the next wave of AI to revolutionize the largest industries.*

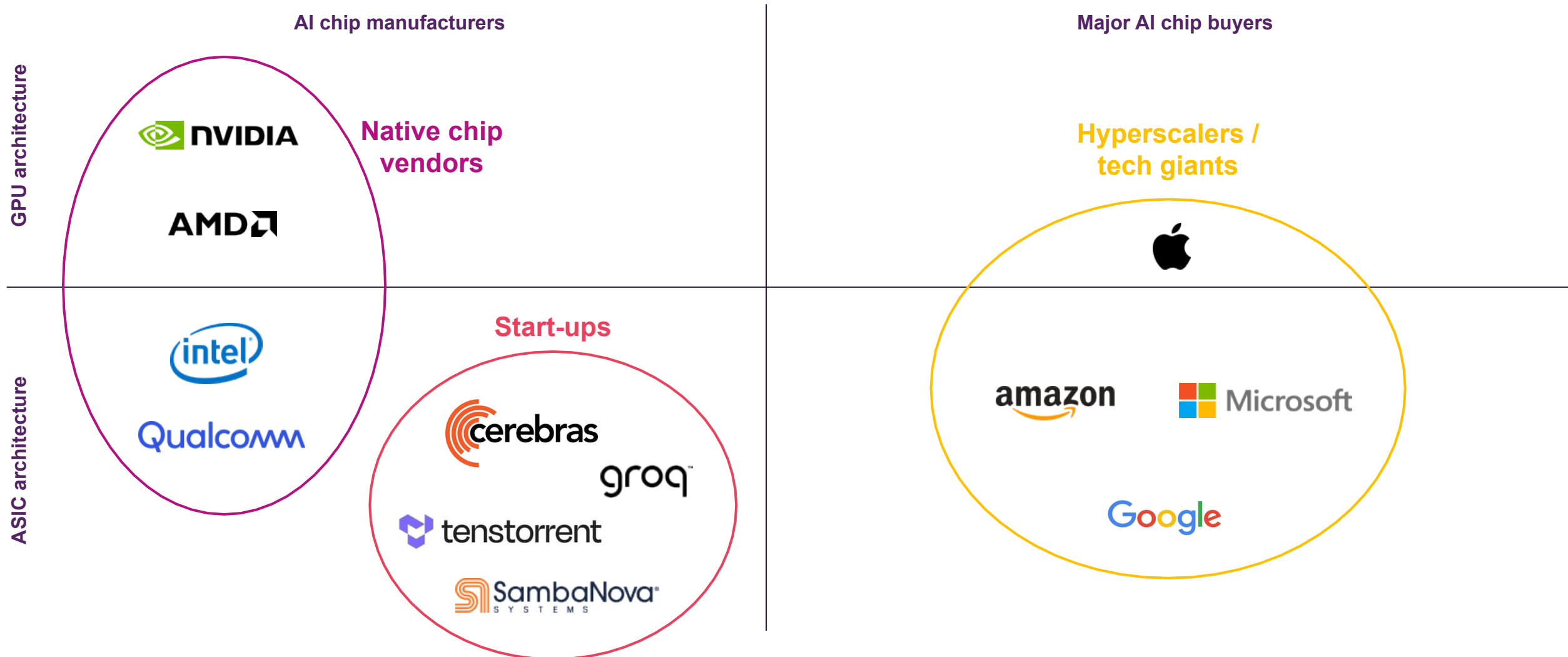
**Jensen Huang**  
**Founder and CEO at NVIDIA**  
(February 2025)



# MediaTech Investment

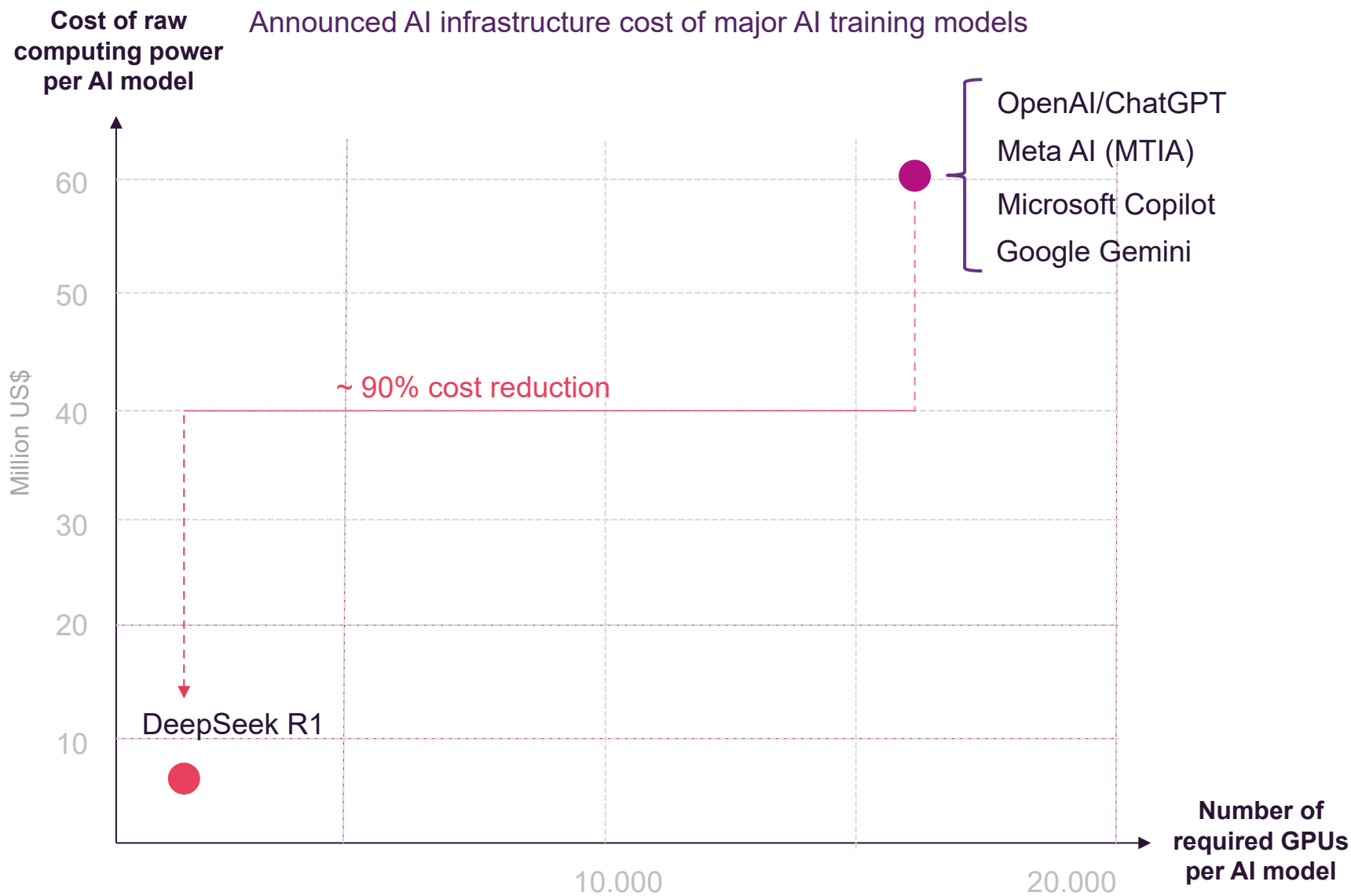
Tech giants/start-ups are challenging GPUs with application-specific infrastructure

AI chip launches in 2023-2024



# MediaTech Investment

DeepSeek is accelerating the democratization of AI training and accelerating cost competition



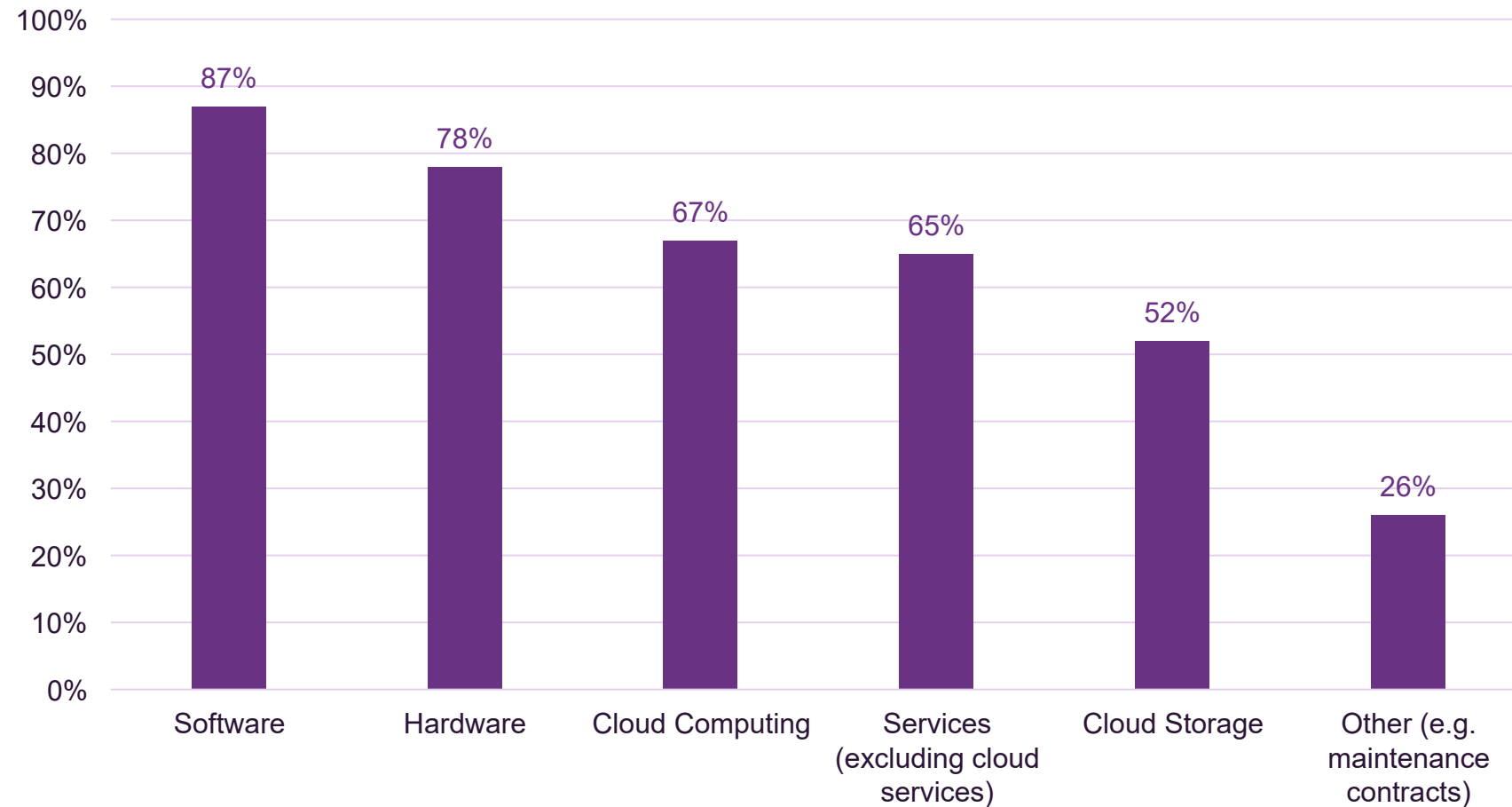
## Democratization of AI training models

- In January 2025, a Chinese AI startup, DeepSeek, published its open source-based low-cost AI training model R1, which outperformed many Western competitors with its more cost-effective AI architecture.
- In early February, DeepSeek's pricing was 20 to 40 times cheaper than what OpenAI charged for equivalent models, according to analyst estimates.
- Since R1's launch, OpenAI has cut prices and released a cheaper O3-Mini model, which relies on less computing power, while Google Gemini has introduced discounted tiers of access.
- Meta and TSMC are said to be currently testing Meta's first in-house training chip designed to handle only AI-specific tasks, improving its power efficiency and reducing Meta's dependence on NVIDIA's chips.
- In January, US President Trump announced Stargate, a joint venture between OpenAI, Oracle and Softbank, worth \$500bn to attract investment in the US' AI infrastructure from global financial markets, reflecting the geopolitical importance of the AI race.

# MediaTech Investment

Software leads industry investment while hardware remains important

MediaTech End-User Investment by Category



Q. Which products/services has your organization invested in over the past year? (2025 YTD)

## Technology Investment

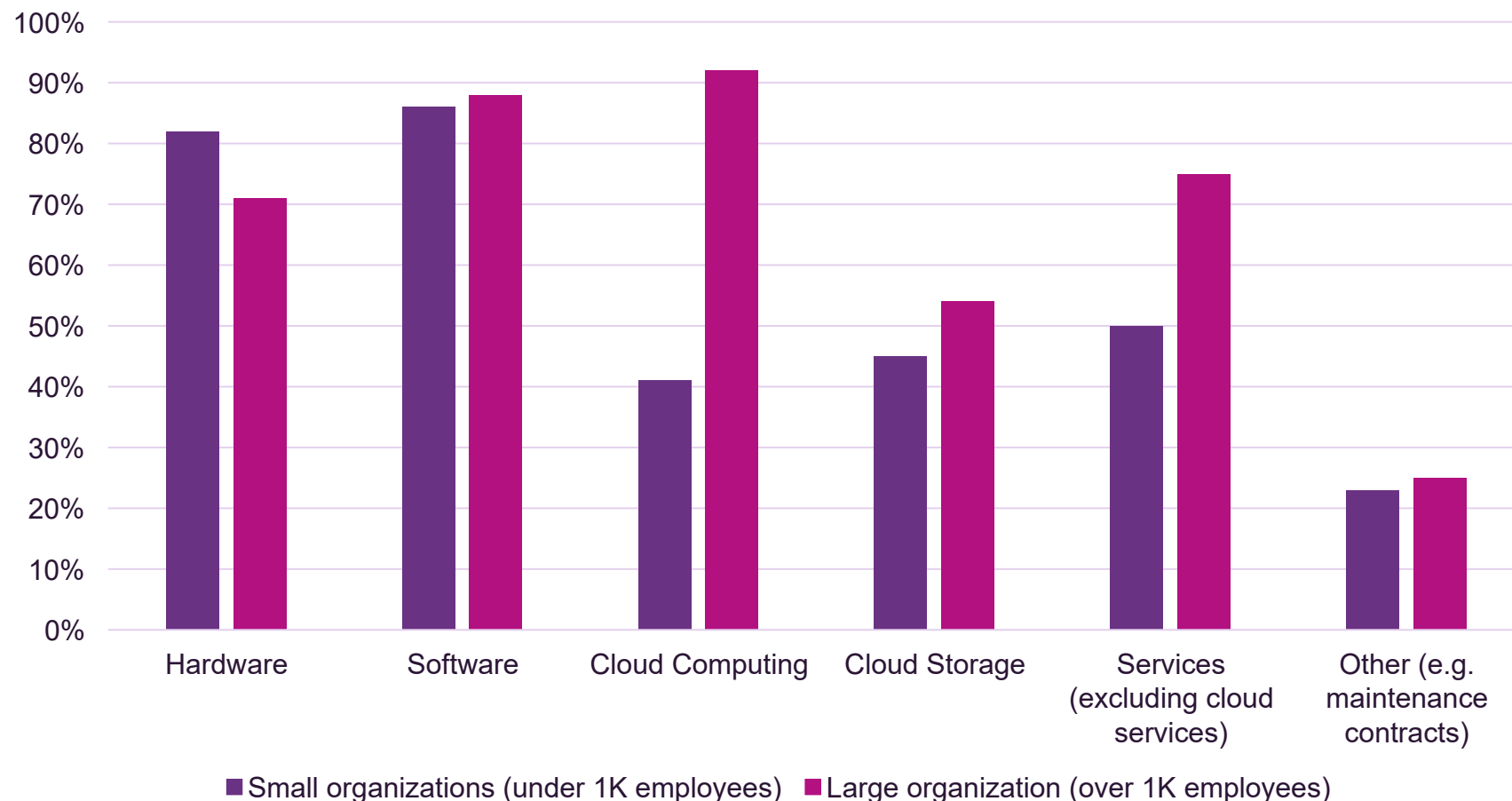
87% of respondents invested in software over the past year, making it the most universal product type.

Hardware was cited by a greater proportion of respondents than both cloud computing and cloud storage.

# MediaTech Investment

Cloud investment and importance are down but adoption has gone up

MediaTech investment by category



Q. Which products/services has your organization invested in over the past year? (2025 YTD)

**Cloud Investment**

Large organizations are investing in cloud computing, as many of the operational efficiencies achieved with cloud workflows are amplified when deployed at scale.

The shifts among respondents to lower importance but higher adoption indicate cloud workflows achieving acceptance and maturity in broadcast and media workflows.

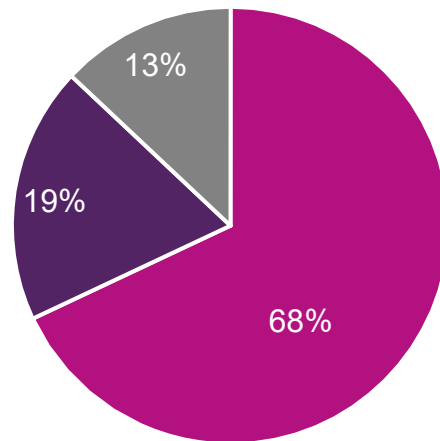
# MediaTech Investment

## Software and cloud services investment outlook and payment models

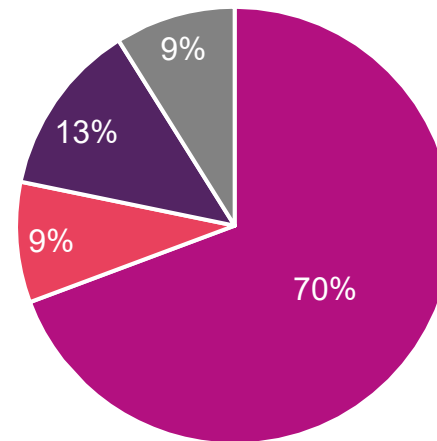
### Preferred payment method:

- On-demand/usage-based pricing
- Permanent licences
- Subscription
- No preference

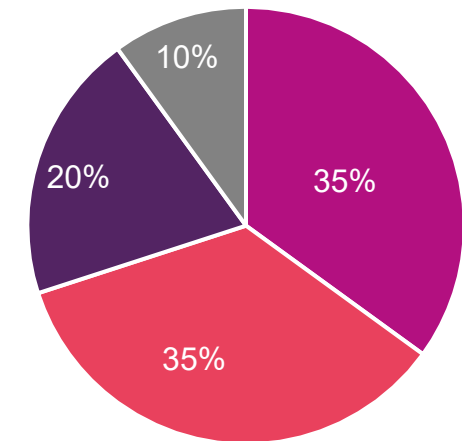
### Cloud Computing



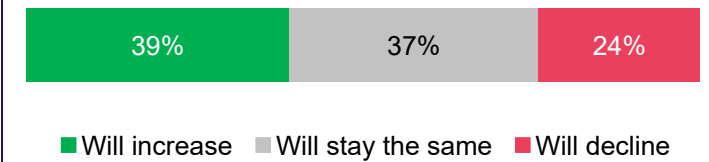
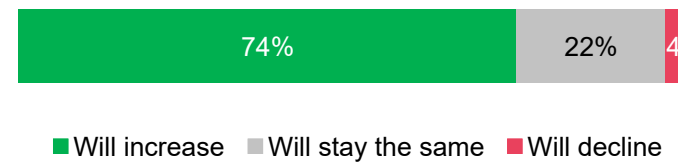
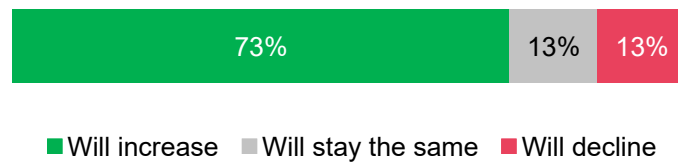
### Cloud Storage



### Software



### Investment outlook:



Q. How does your organization prefer to pay for the following products/services Q. How does your organization prefer to deploy cloud computing/cloud storage? (Media/production companies)

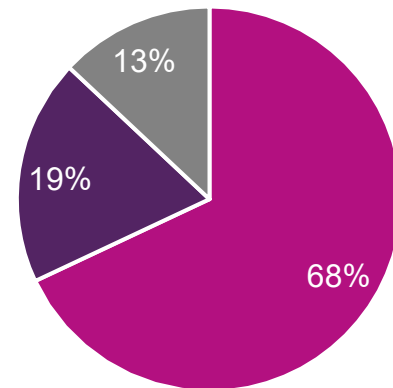
# MediaTech Investment

## Cloud computing: preference for multi-cloud deployment model



End-Users' Preferred Payment Method

- On-demand/usage-based pricing
- Permanent licences
- Subscription
- No preference

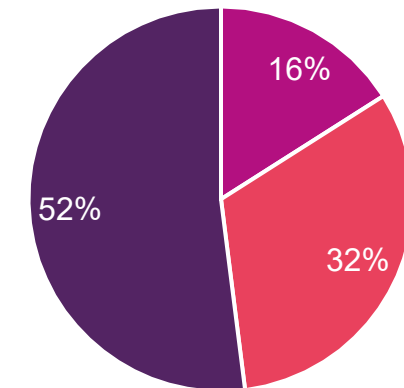


Q. How does your organization prefer to pay for cloud computing? (Media/production companies, n=31)

On-demand/usage-based pricing leads by a considerable margin as the preferred payment method for cloud computing among respondents.

End-Users' Preferred Deployment Model

- Private cloud
- Single public cloud provider
- Multiple public cloud providers



Q. How does your organization prefer to deploy cloud computing? (Media/production companies, n=31)

Only 16% of respondents preferred to deploy cloud computing on a private cloud. When using public cloud, a greater proportion of respondents preferred to use a multi-cloud approach over choosing a single provider.

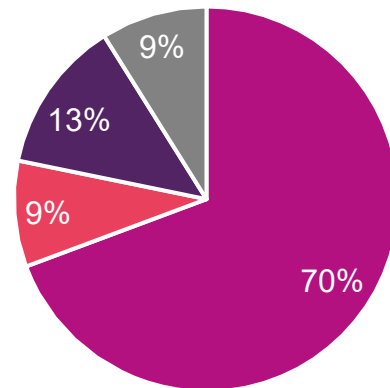
# MediaTech Investment

## Cloud storage: preference for multi-cloud deployment model



End-Users' Preferred Payment Method

- On-demand/usage-based pricing
- Permanent licences
- Subscription
- No preference

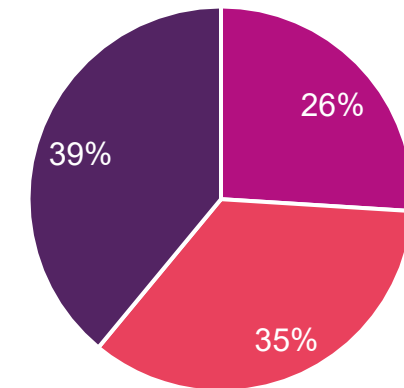


Q. How does your organization prefer to pay for cloud computing? (Media/production companies, n=23)

On-demand/usage-based pricing was preferred by a considerably larger proportion of respondents than any other payment method for cloud storage.

End-Users' Preferred Deployment Model

- Private cloud
- Single public cloud provider
- Multiple public cloud providers



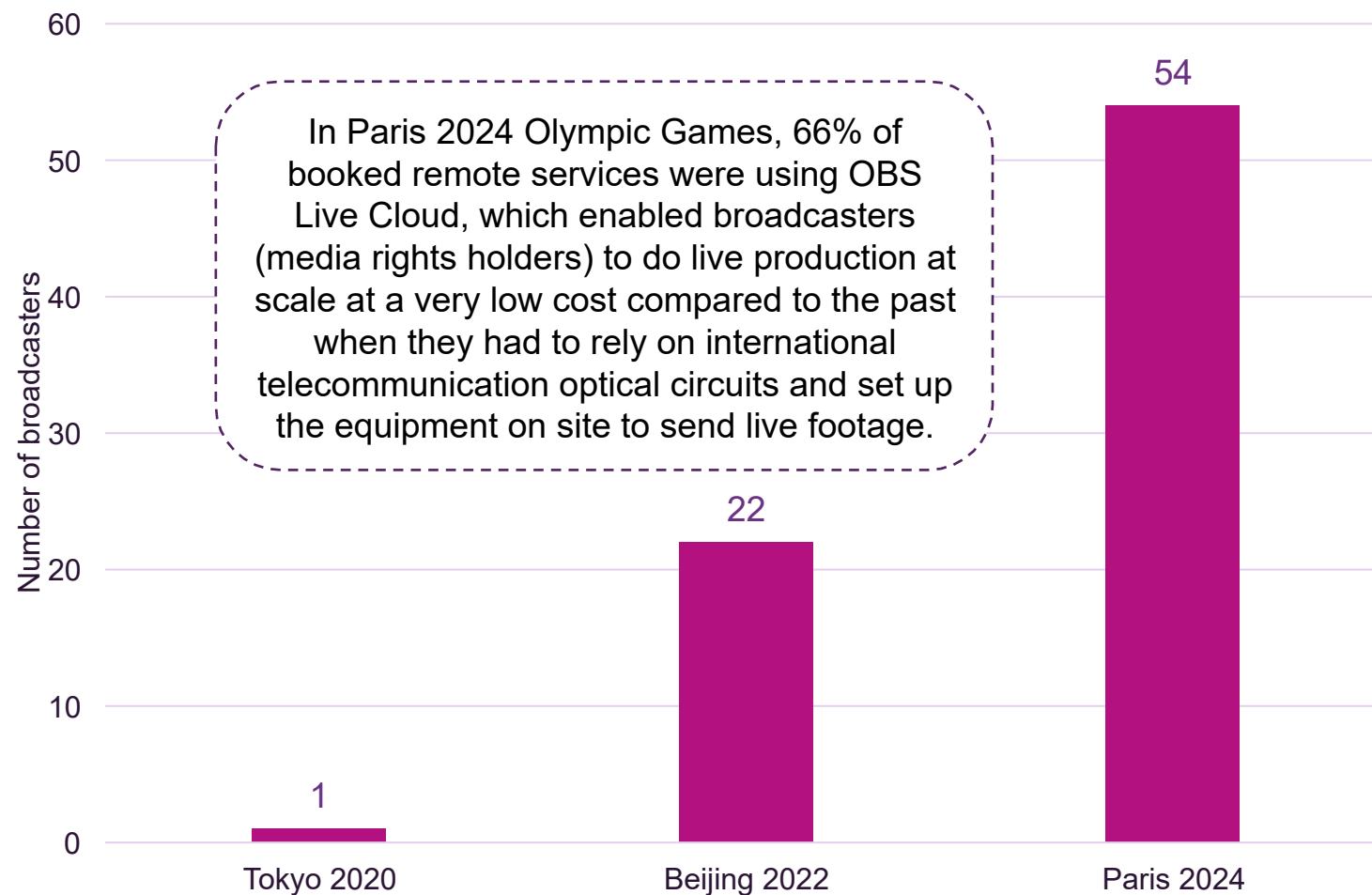
Q. How does your organization prefer to deploy cloud computing? (Media/production companies, n=23)

Respondents were more evenly distributed in their preferred deployment model for cloud storage than cloud compute, though the overall ranking still followed the same pattern (multi-public, single-public, private).

# MediaTech Investment

Live cloud production took off at the Olympics, driven by cost and efficiency needs

Broadcasters using OBS Live Cloud



In Paris 2024 Olympic Games, 66% of booked remote services were using OBS Live Cloud, which enabled broadcasters (media rights holders) to do live production at scale at a very low cost compared to the past when they had to rely on international telecommunication optical circuits and set up the equipment on site to send live footage.

Supplier in an IABM interview

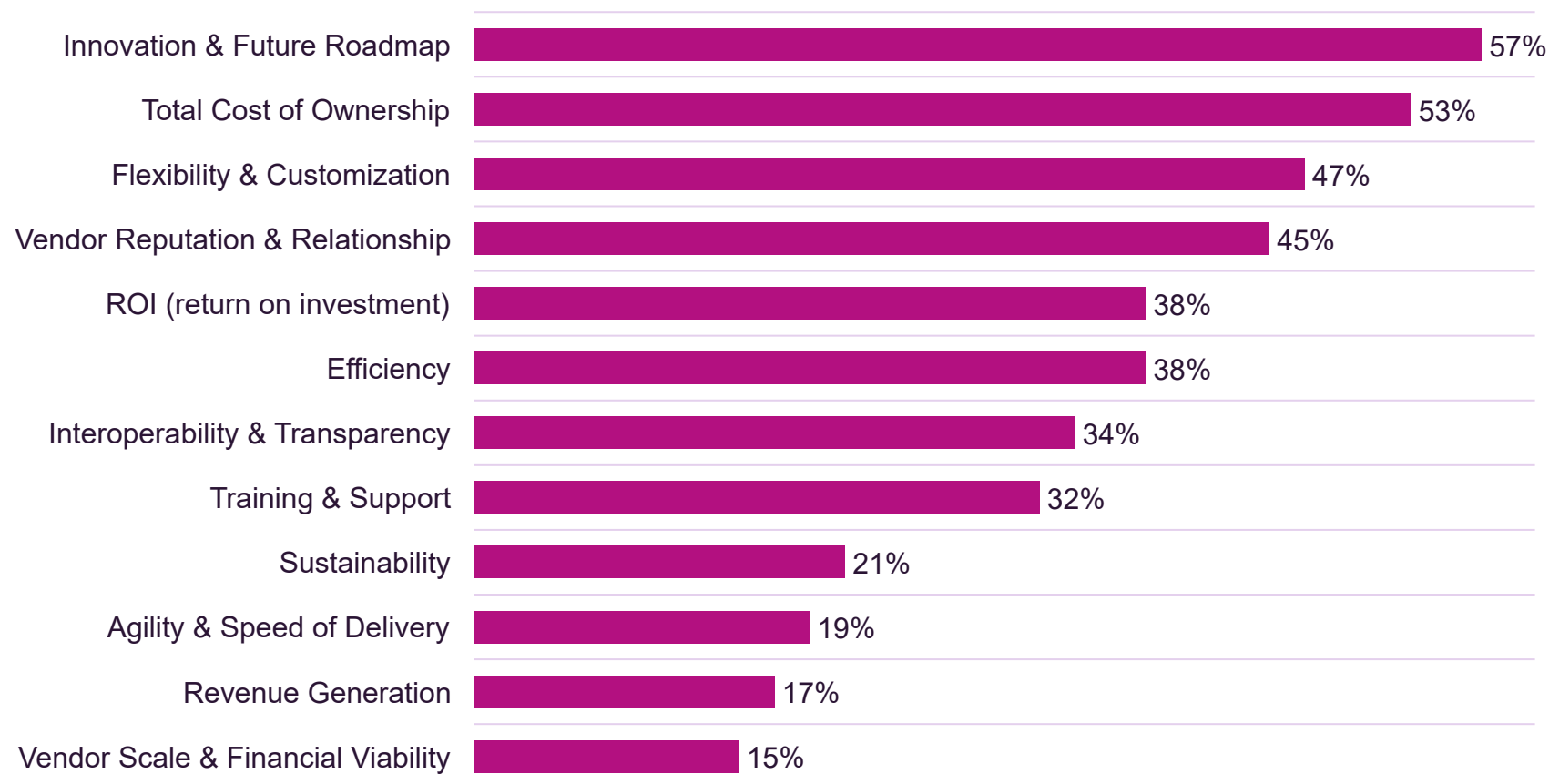
**Live cloud production** – which is basically having production control room with all of the functionality operating in the cloud – improves. Not rolling a huge production truck to venues all across the country is a **tremendous saving**. We get to the point where the cloud infrastructure to produce a major **sports game costs less** for our customers than the hotel room for one of their employees. This is something that many of our customers are very excited about.

Public cloud service provider  
North America  
(July 2024)

# MediaTech Investment

Innovation and future roadmap remains the most important investment driver

## Technology Purchasing Factors



### Innovation & Future Roadmap

Future technology roadmap, total cost of ownership, customization, and vendor reputation continue to be the primary investment drivers for MediaTech End-Users.

In contrast to 2024, when efficiency ranked among the top three factors, media technology buyers now place somewhat less emphasis on this aspect.

Q. In general, besides cost and technical specification, what are the most important factors that influence your decision to purchase media technology products and services? (media/production companies, n=47)

# MediaTech Investment

## MediaTech investment drivers: Historical importance

	Average 2022-2023	2024	2025
1	Innovation & Future Roadmap	Innovation & Future Roadmap	Innovation & Future Roadmap
2	Total Cost of Ownership	Total Cost of Ownership	Total Cost of Ownership
3	Vendor Reputation/Relationship	Efficiency	Flexibility & Customization
4	Training/Support	Flexibility & Customization	Vendor Reputation/Relationship
5	Interoperability/Transparency	Vendor Reputation/Relationship	Efficiency ROI

Investment drivers highlighted in green/red have increased/decreased in their ranking compared to the previous period.

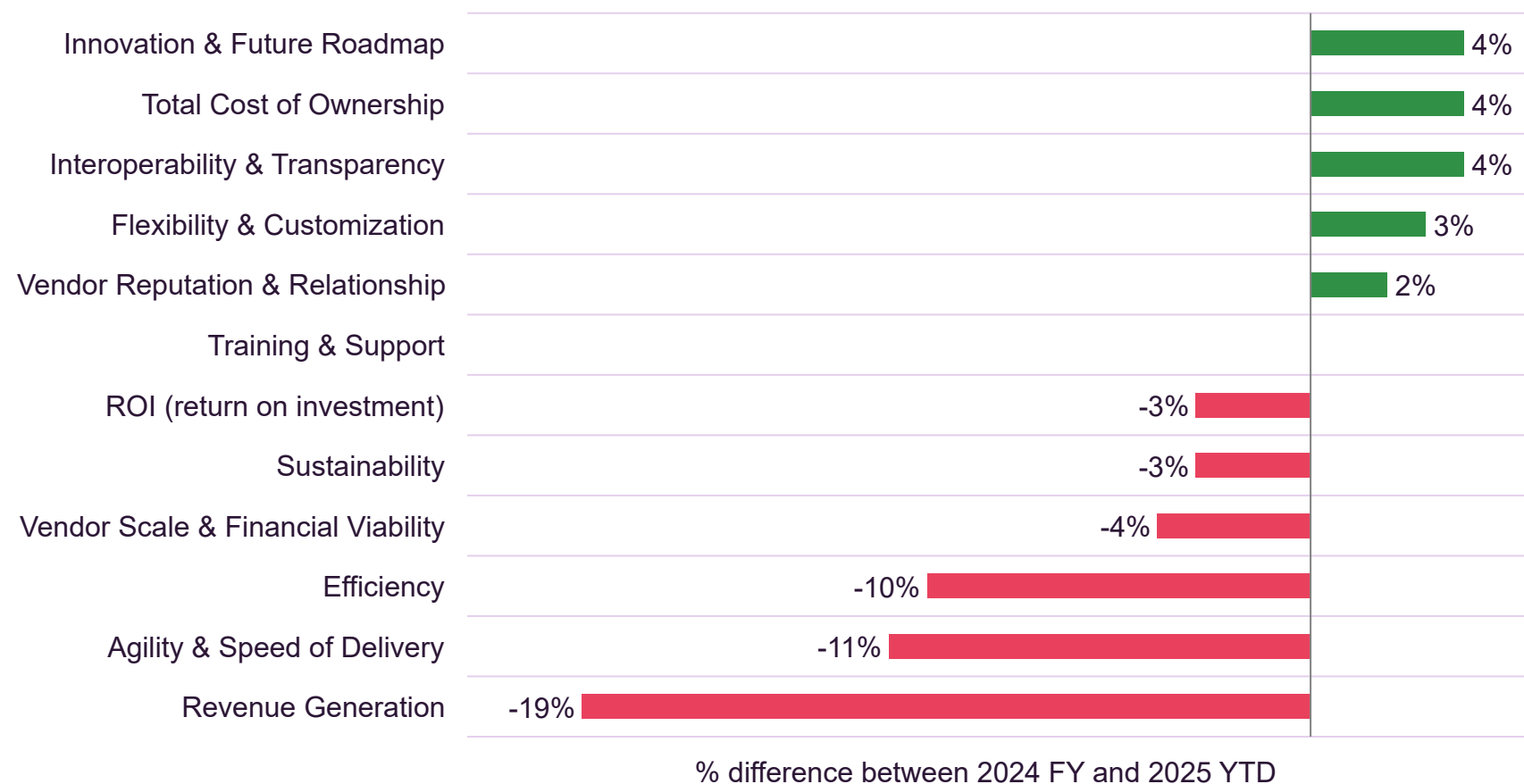
Q. In general, besides cost and technical specification, what are the most important factors that influence your decision to purchase media technology products and services?

Avoiding obsolescence remains a consistent and critical factor in investment decision making. Futureproofing technology purchases to ensure they remain relevant is most important followed by consideration for the total cost of ownership. Flexibility & customization remain an important factor as well to ensure the deployment can be adapted over time.

# MediaTech Investment

Revenue generation becoming less critical in MediaTech investment decisions

MediaTech investment drivers



**Investment Drivers**

Investment priorities are shifting away from revenue generation toward future technology planning and total cost of ownership.

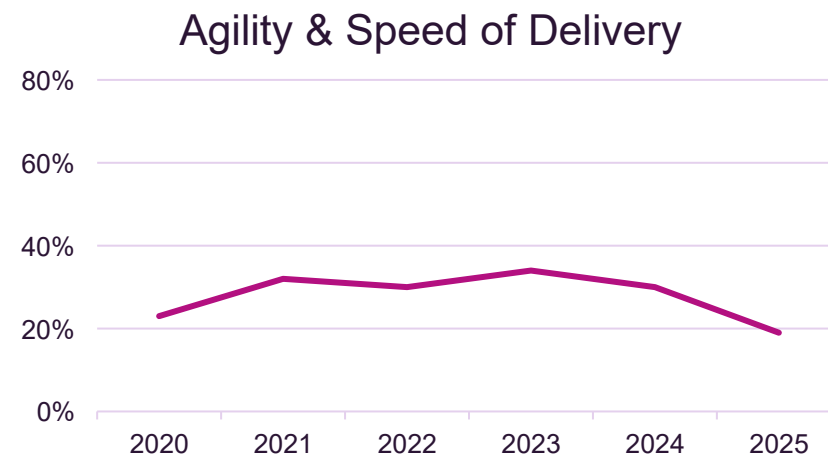
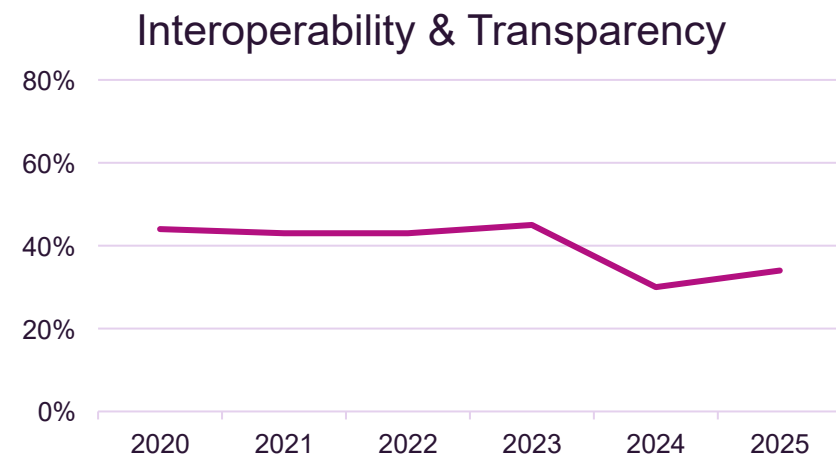
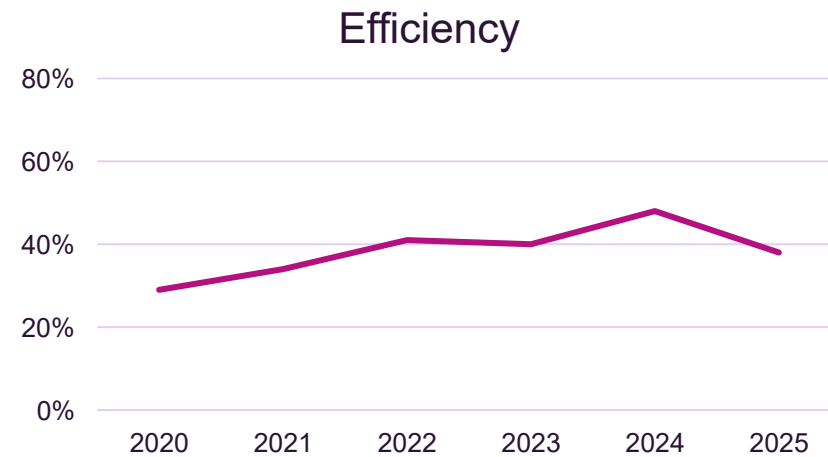
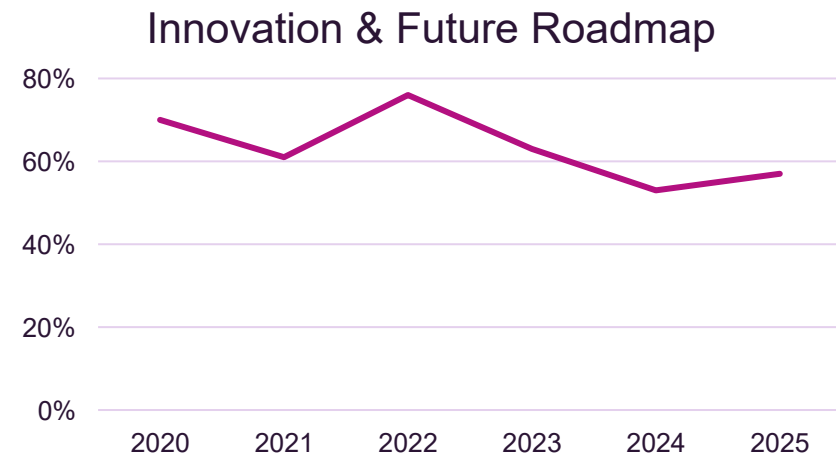
No technology factors registered an increase of 5% points or more year-on-year in the proportion of respondents that cited them as important technology roadmap trends.

Q. In general, besides cost and technical specification, what are the most important factors that influence your decision to purchase media technology products and services? (media/production companies, n=47)

# MediaTech Investment

## Year-on-year comparison of investment driver importance

### MediaTech investment drivers



A slightly greater proportion of respondents cited innovation & future roadmap and interoperability & transparency as important drivers of investment in 2025 YTD vs 2024, however the uplift was not enough to be statistically significant.



Efficiency and agility & speed of delivery were both selected as important technology roadmap trends by a lower proportion of respondents in 2025 YTD vs 2024, however again the decrease was not statistically significant.

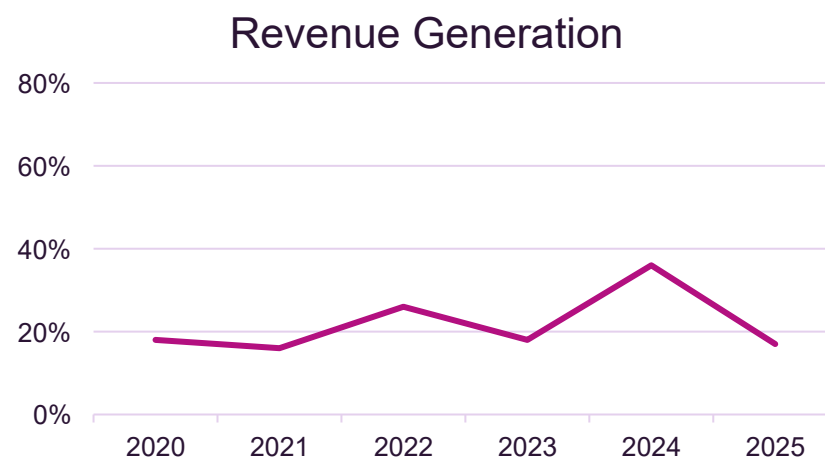
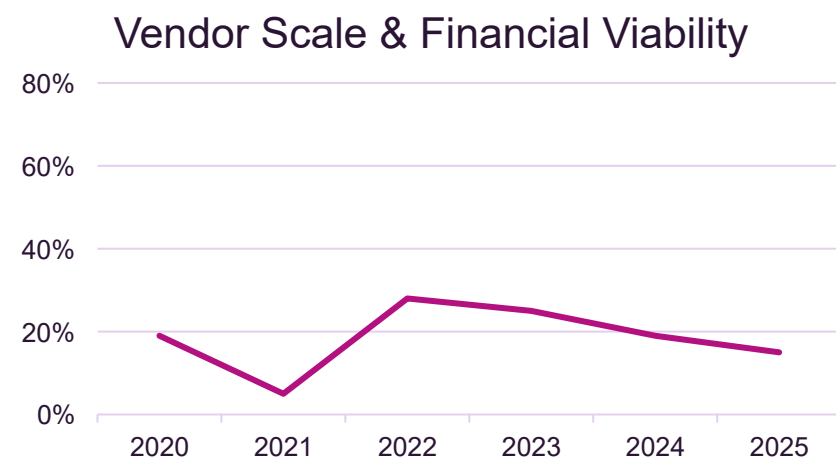
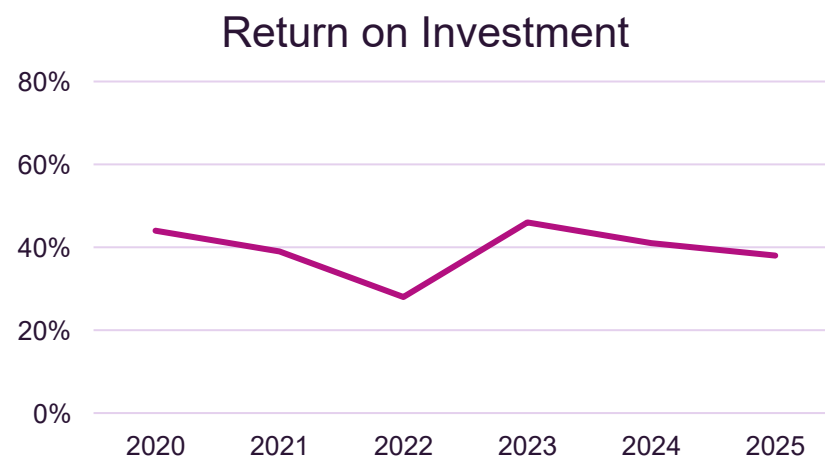
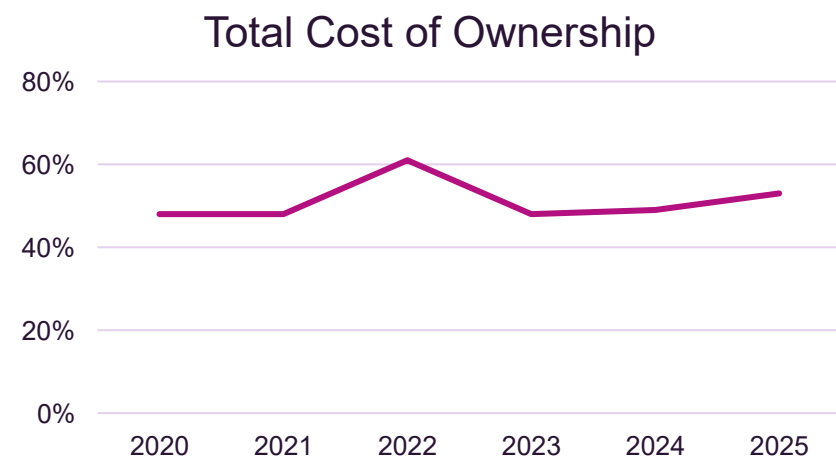


Q. What are the most important trends in your organization's technology roadmap? (n=150)

# MediaTech Investment

## Year-on-year comparison of investment driver importance

### MediaTech investment drivers



Total cost of ownership was cited as an important factor in technology roadmap decision making, however the year on year increase was relatively minor increasing by 4% points from 49% to 53%.



Return on investment, revenue generation and vendor scale and financial viability were all cited by a lower proportion of respondents in 2025 YTD compared to 2024. Revenue generation fell by 19% points from 36% to 17%.

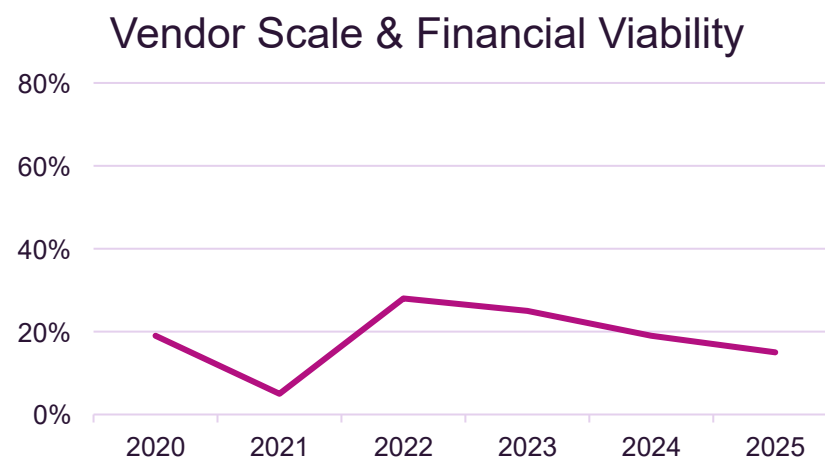
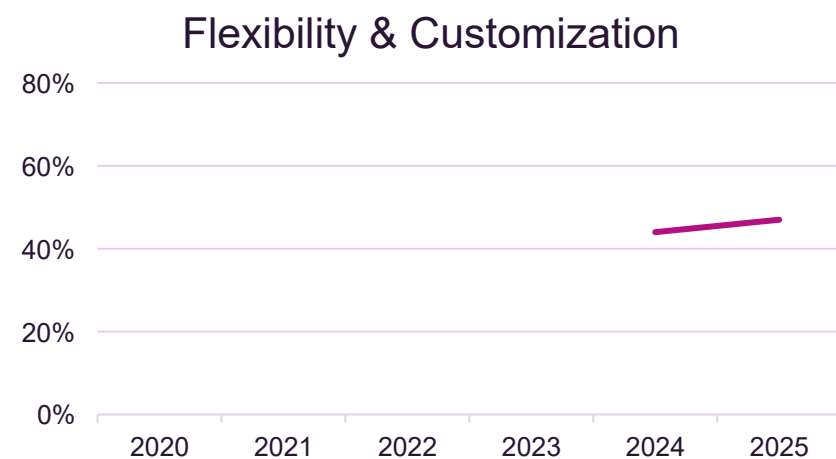
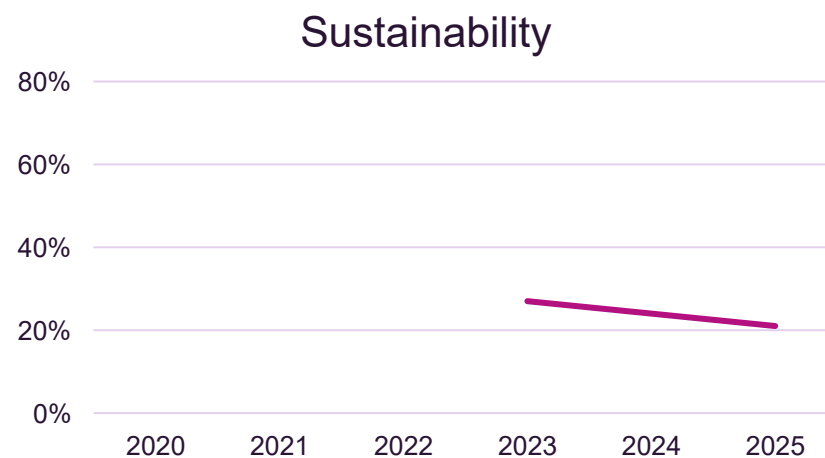
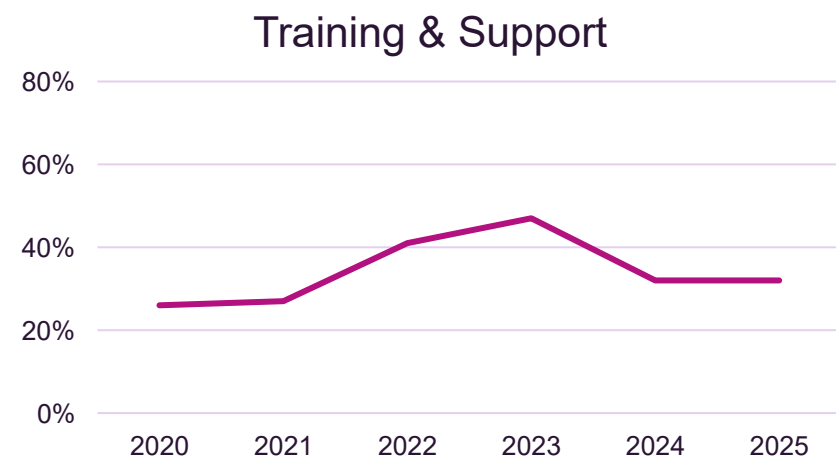


Q. What are the most important trends in your organization's technology roadmap? (n=150)

# MediaTech Investment

## Year-on-year comparison of investment driver importance

### MediaTech investment drivers



Flexibility & customization registered an increase in the proportion of respondents that cited them as important however in both cases the rise from 2025 YTD vs 2024 was statistically insignificant.



Sustainability and vendor scale & financial viability have both decreased slightly in importance as the proportion of respondents noting these trends as important has fallen. The change from 2025 YTD vs 2024 has been relatively small in both cases.

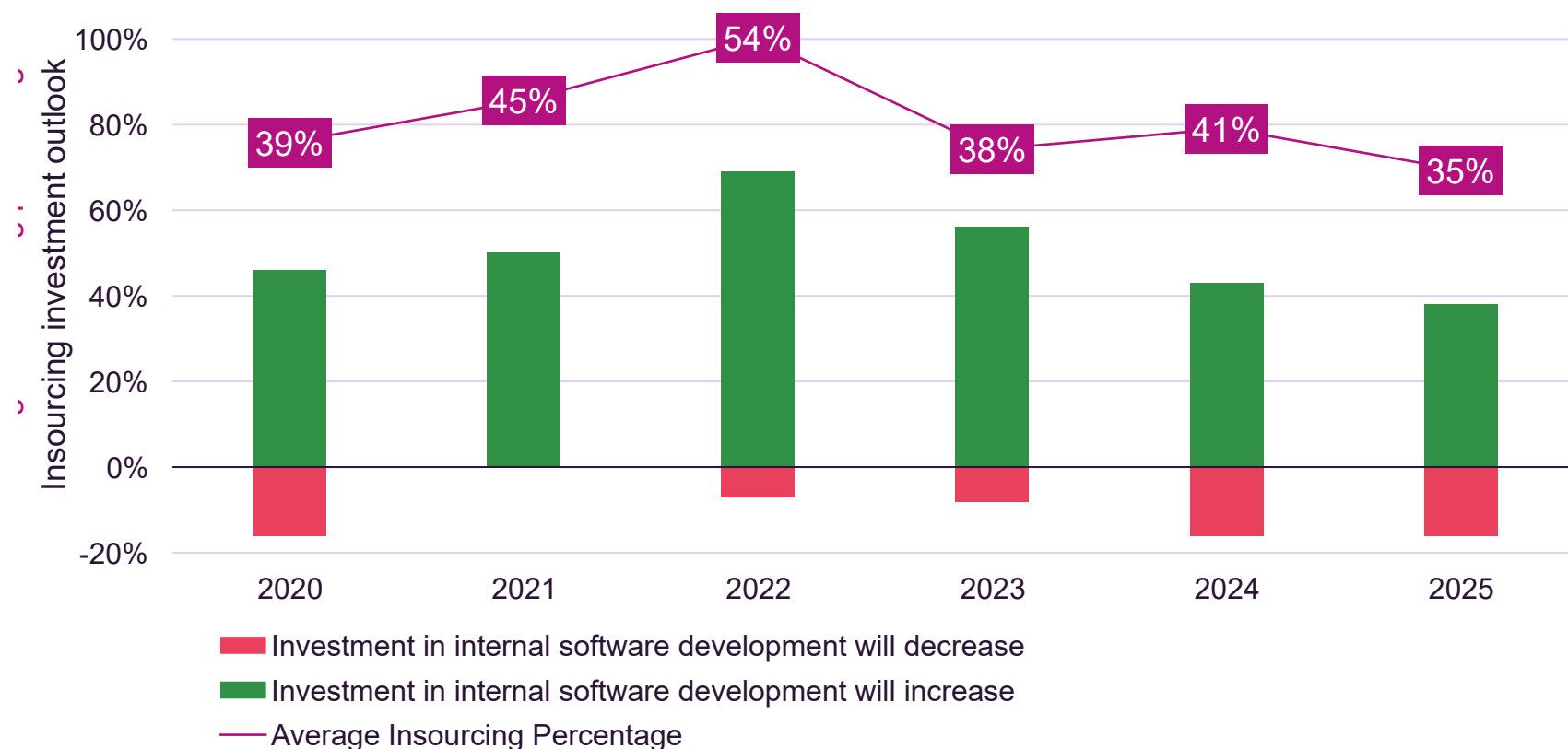


Q. What are the most important trends in your organization's technology roadmap? (n=150)

# MediaTech Investment

Insourcing investment declines as media businesses cut costs and focus on core

Insourcing by media businesses



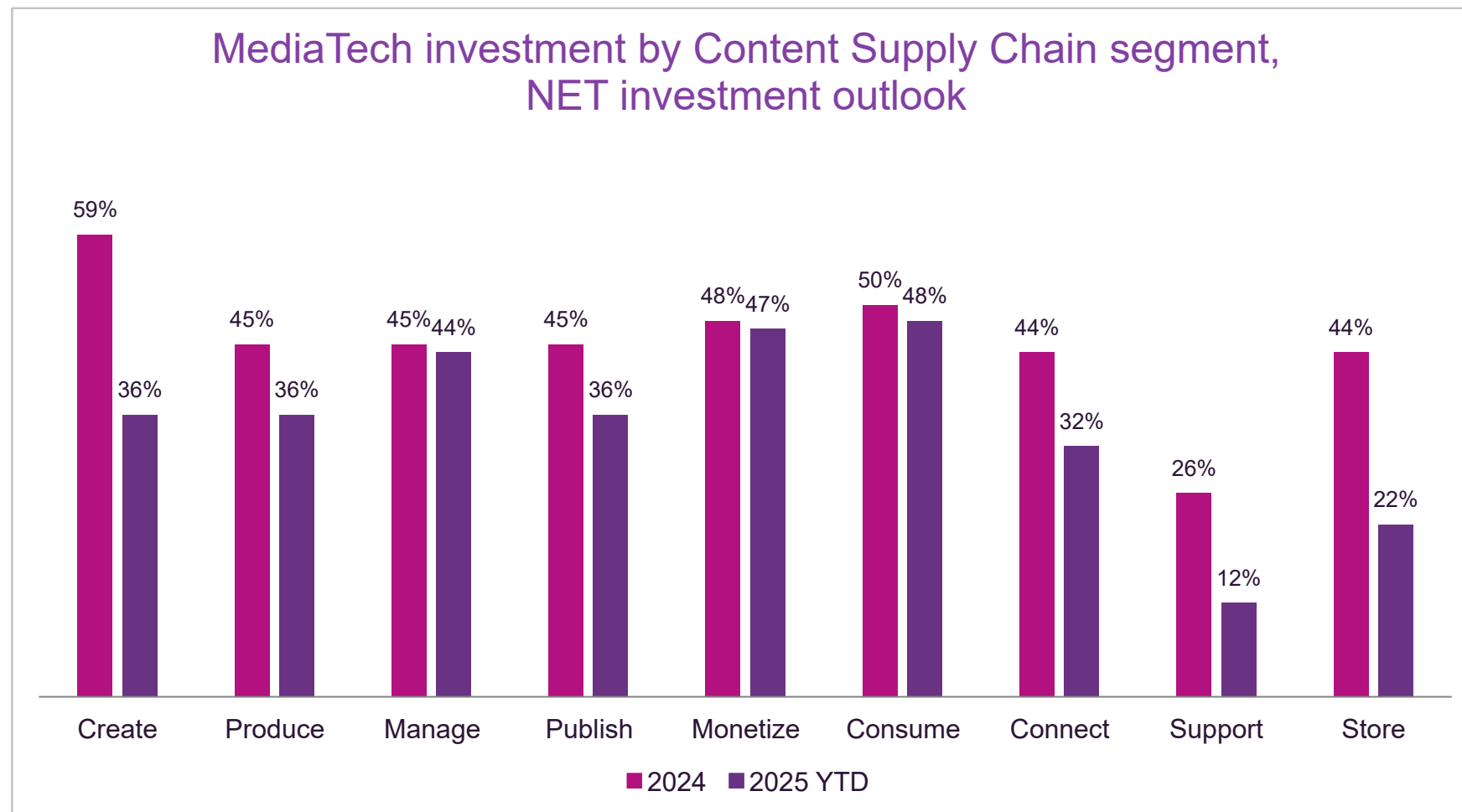
**Insourcing**

Net investment in software development has decreased in 2025 YTD vs 2024. The proportion of respondents that expect to see a decrease in investment has remained relatively consistent however fewer respondents expect to increase their investment in internal software development.

Q. What is the percentage of products/solutions your organization builds by itself using internal system integration resources or software development tools versus the percentage of product/solutions bought from third-party product/service suppliers? Q. How will your investment in internal software development change over the next year?

# MediaTech Investment

## Shifts in content supply chain technology investment patterns



**Create**

The create segment of the BaM content chain registered a 23%-point decrease in NET investment in 2025 YTD vs 2024.

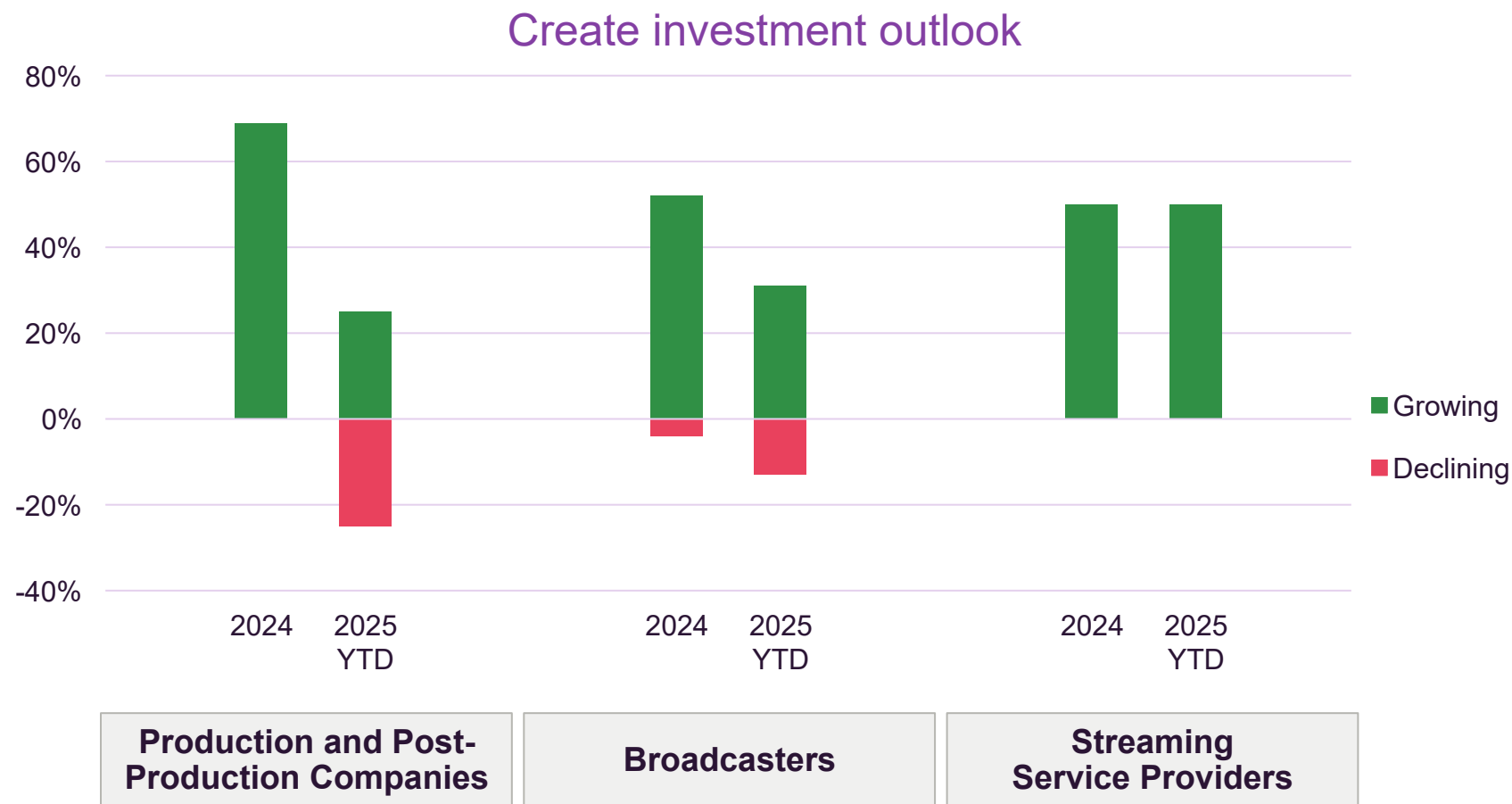
**Store**

NET Investment in products from the store segment has halved, falling by 22% points in 2025 YTD vs 2024.

Q. How is technology investment in the following content supply chain segments changing?  
 NET investment consists of subtracting the % of companies saying that investment is decreasing from the % of companies saying that it is increasing.

# MediaTech Investment

Decline in Create is primarily driven by production and post-production companies



**Delayed Recoupment**

Production and post-production companies cited a decline in investment in create segment products the most out of the three end-user segments. Research interview feedback indicates that content commissioning and production remains subdued in the wake of the Hollywood strikes, delaying the recoupment of recent investment in current gen acquisition products.

Q. How is technology investment in the following content supply chain segments changing? (Create)

# MediaTech Investment

Decline in Store is primarily driven by North America, while Europe remains stable



**Store**

A greater proportion of respondents stated that their investment in Store segment products will decline in 2025 YTD compared to 2024. This trend was consistent across all regional segments, although North America registered the greatest increase in the proportion of respondents that will spend less on this BaM content chain segment.

Q. How is technology investment in the following content supply chain segments changing? (Store)

# MediaTech Investment

## Shifts in content supply chain technology investment patterns

2025 YTD	Top Drivers	Top Category	Bottom Category	Comments
Create/Produce	Remote Production	Real-Time Production & Graphics	Synthetic Audio and Video (Generative AI)	Focus on live sports drives real-time production tech
Manage	AI & ML	Media Management	Access & Localization	Focus on media and data management, driven by AI
Publish	OTT & Streaming	Digital Distribution	Exhibition & Display Technologies	Dominance of digital distribution and streaming
Monetize/Consume	OTT & Streaming	Advertising Platforms	Rights Management	Focus on ad tech, driven by the rise of streaming platforms
Connect	IP Transport & Networking	IP Routing & Networking	Satellite Connectivity	Shift from satellite to IP routing & networking, Internet & IP connectivity
Support	AI & ML    Cloud Computing	Cybersecurity	Facility Hardware	Cybersecurity emerges as investment priority amid cloud and AI growth
Store	Cloud Storage	Cloud & On-Prem Storage	VTRs/DVRs/Servers	Increased investment in cloud and on-prem storage tech

Q. Please select the top & bottom investment priorities in [Content Chain Segment] from your perspective. (n=51-90 per segment)

# MediaTech Resilience

Key drivers of change in 2025 and beyond

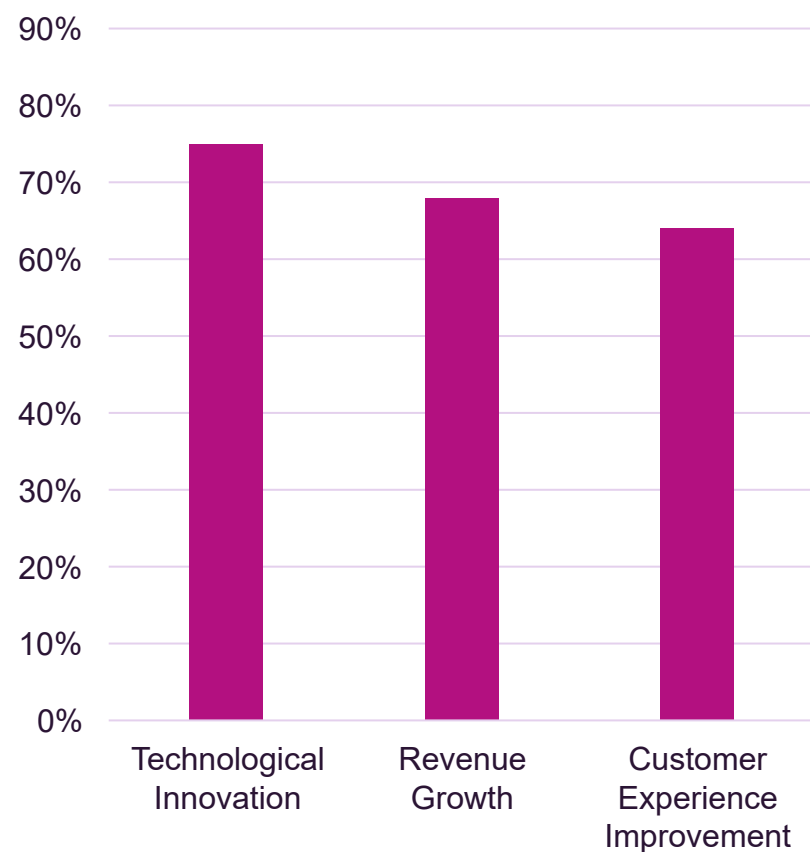
# MediaTech Business Models

Technology innovation is driving business transformation



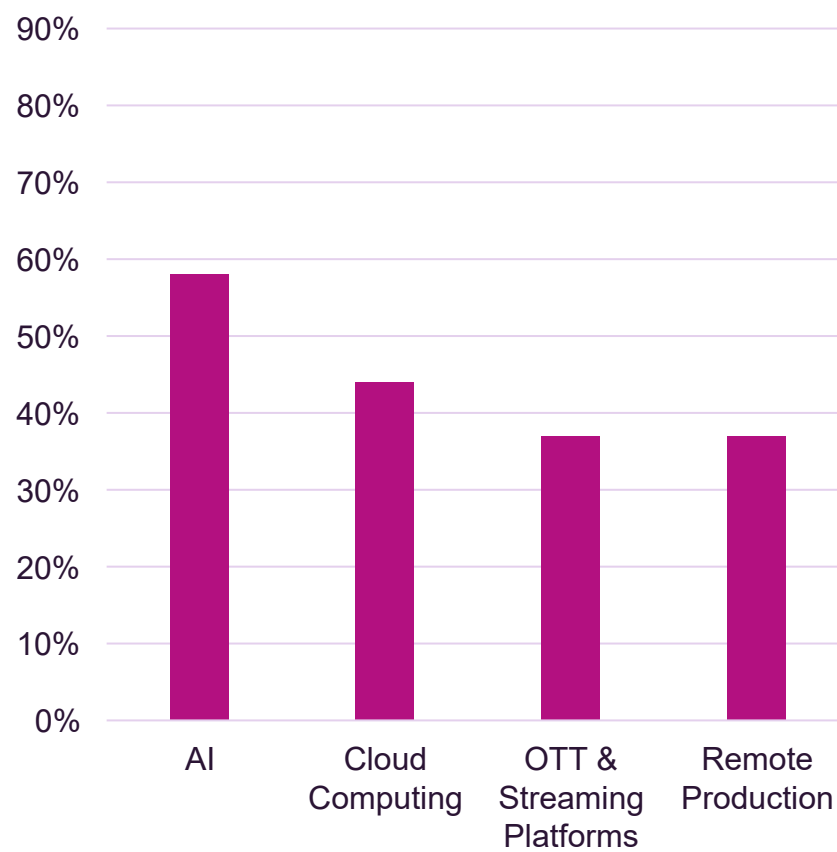
New IABM report on this topic published on MediaTech Vantage™ in Q1 2025!

Key Drivers of Business Transformation (Top 3)



Q. What are the key drivers of business transformation within your organization?

Critical Transformation Technologies (Top 3)



Q. Which technologies are most critical to your transformation initiatives? Only most popular responses are shown in the chart.

## Business Transformation

IABM's Business Transformation Megatrend report examines the process of conducting strategic and operational overhauls to remain competitive and resilient in a rapidly evolving market.

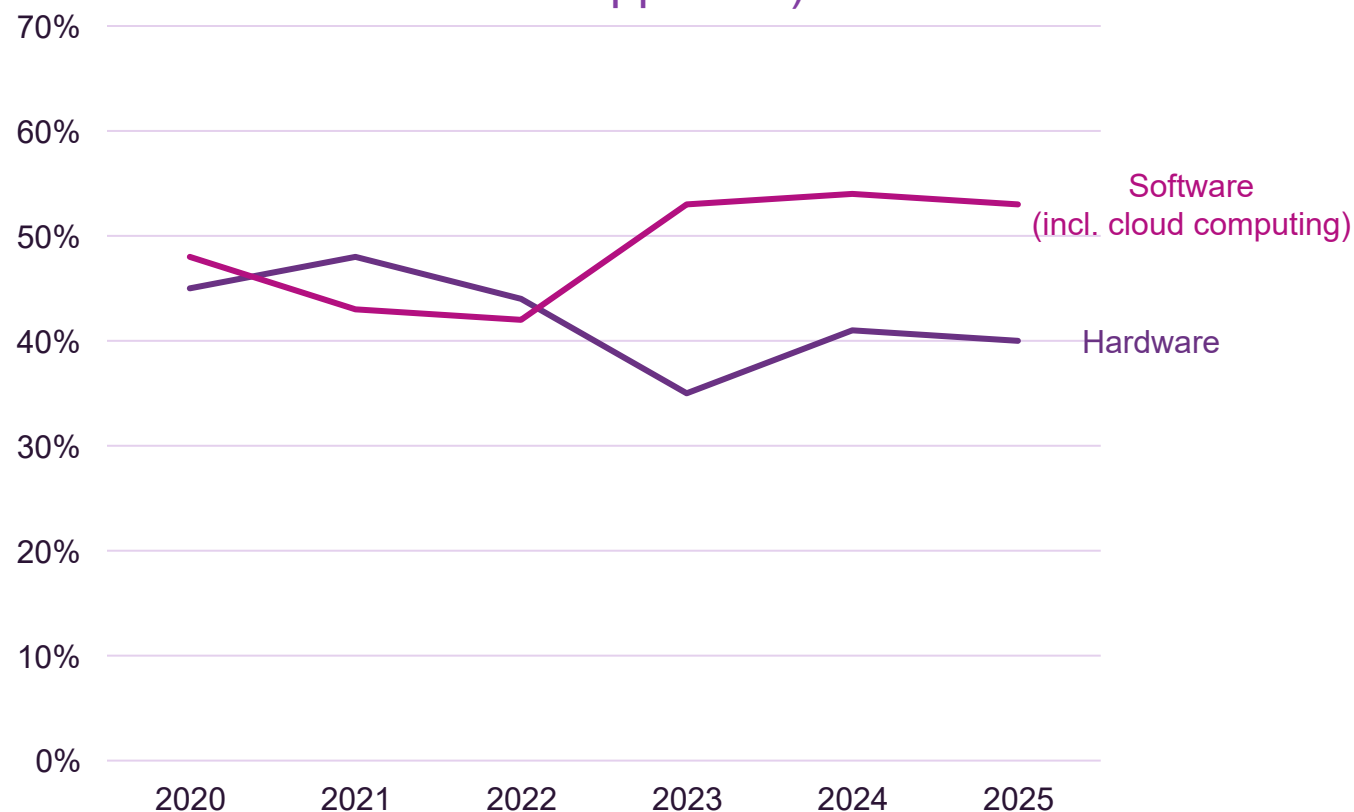
## Survey Methodology

IABM's Business Intelligence Unit conducted a short survey targeting senior leaders in MediaTech organizations that are either leading (66%) or involved in (34%) the operational strategy and decision making for their organization.

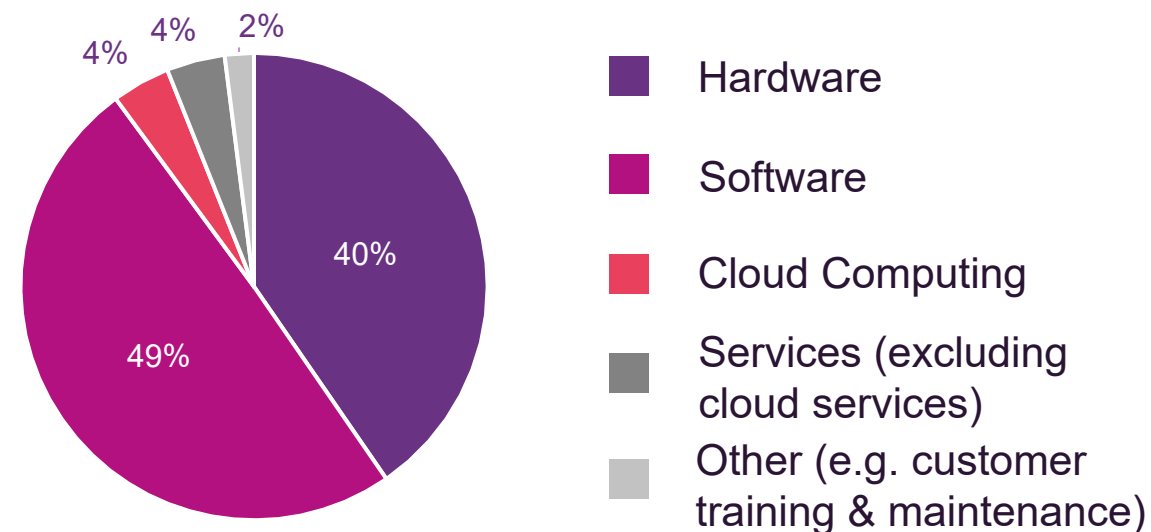
# MediaTech Business Models

## Suppliers continue to rely primarily on software revenue

Supply-side primary revenue sources (2020-2024 approach)



Supply-side primary revenue sources 2025 YTD



### Survey Update

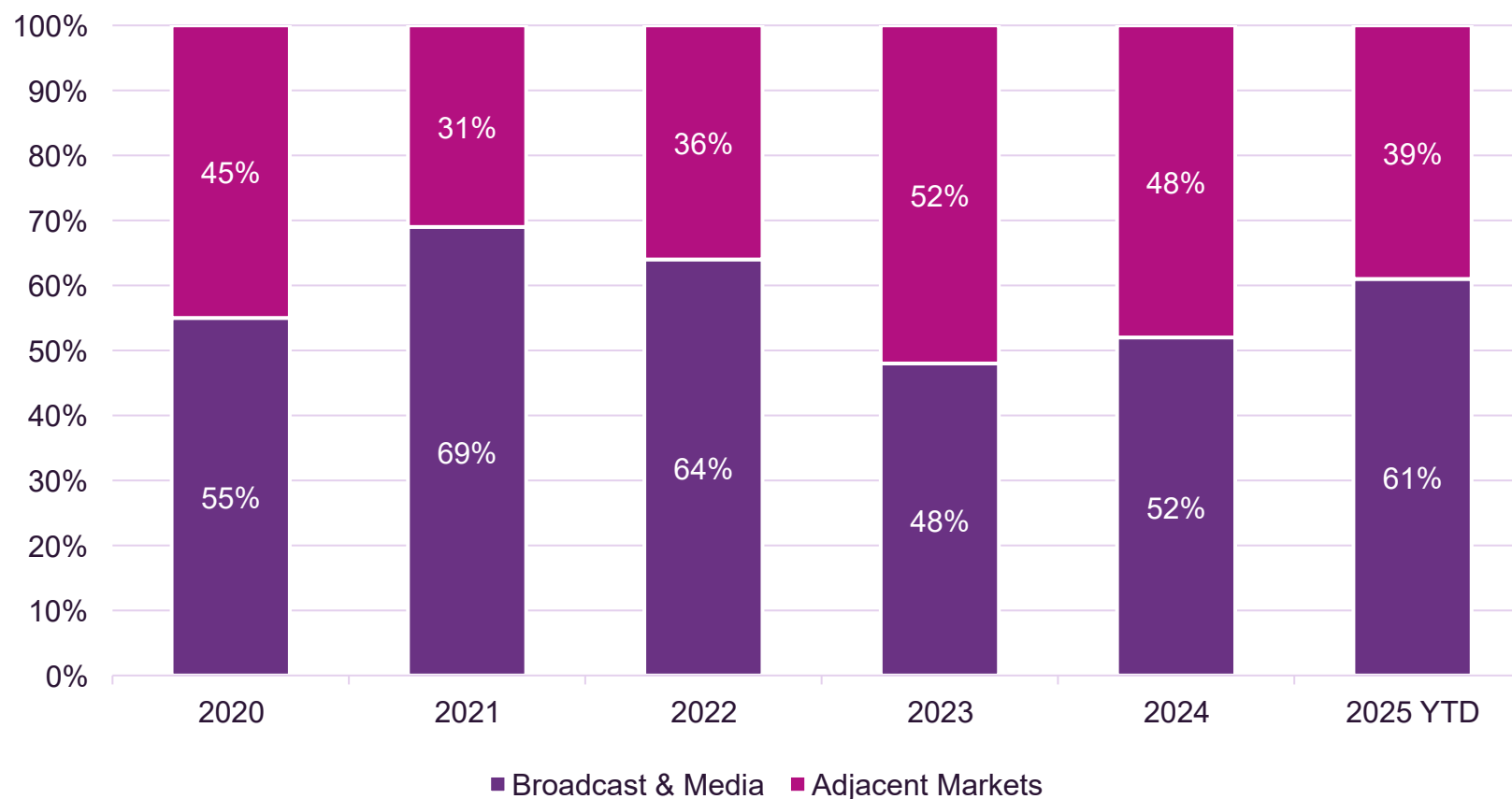
In previous iterations of IABM's MediaTech Industry Tracker survey participants were asked about their primary revenue source by technology type and the leading method of payment for software within a single question. As of 2025, these two areas of focus have been separated into individual questions.

Q. What is your organization's primary source of revenue? (media technology vendors, n=91)  
 From 2020 to 2024, "Cloud Computing" was included as part of the software category. In 2025, it became a separate response option but has been combined with software in this chart to enable comparison of 2025 YTD and historical data.

# MediaTech Business Models

Broadcast & media business improves while parallel markets remain important

Average % share of MediaTech supplier revenues by source



**Broadcast**

Following a recent shift in revenue source towards parallel markets in 2023, broadcast & media reclaims a greater share of supplier's revenues in 2025 YTD

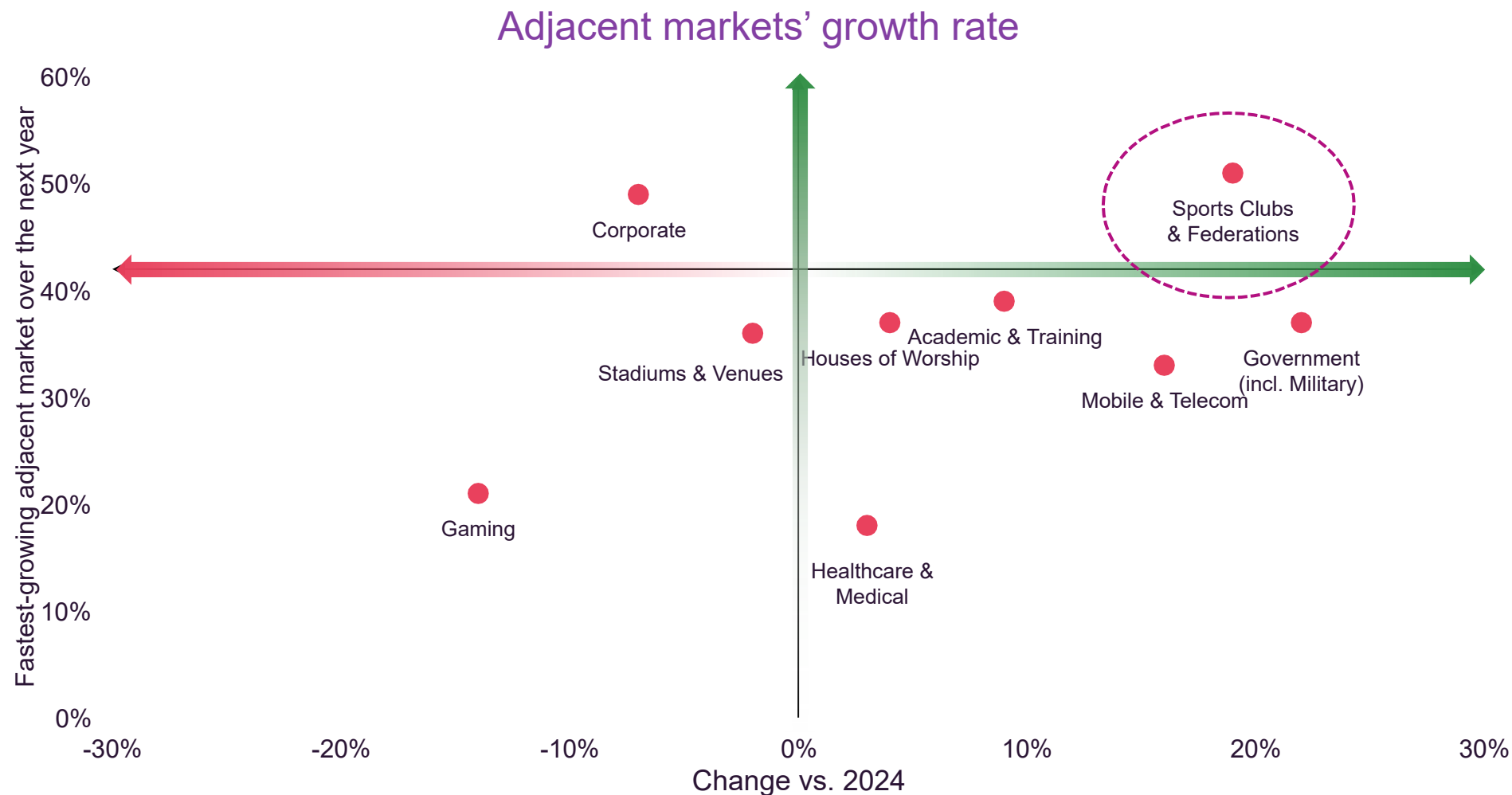
**Parallel Markets**

Parallel markets, such as corporate, government, and education represent new revenue generation opportunities, while the increase in share of broadcast & media revenue share reflects improving market health.

Q. What percentage of your company's revenues are derived from sales to broadcast and media customer types (broadcasters, streaming platforms etc.)? (media technology vendors, n=62)

# MediaTech Convergence

Sports clubs and federations remains the fastest-growing market for M&E industry

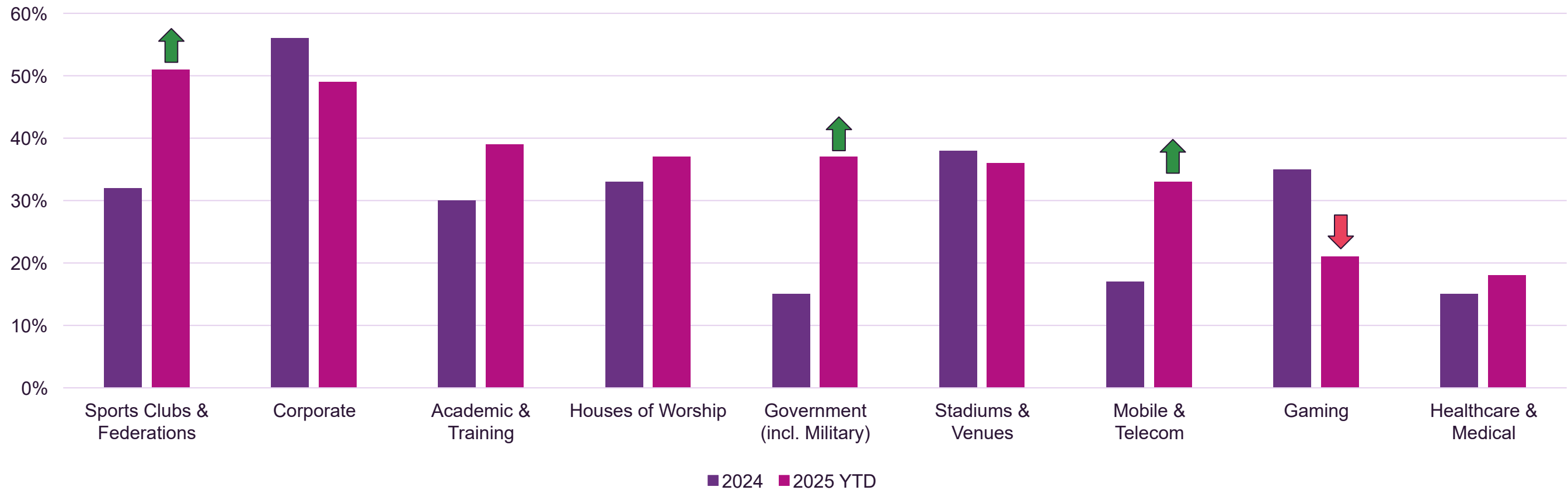


Q. What are your organization's revenue segments? Q. Please select the fastest-growing revenue segment over the next year. (n=78)

# MediaTech Convergence

Sports clubs, government, and mobile networks have seen the most growth

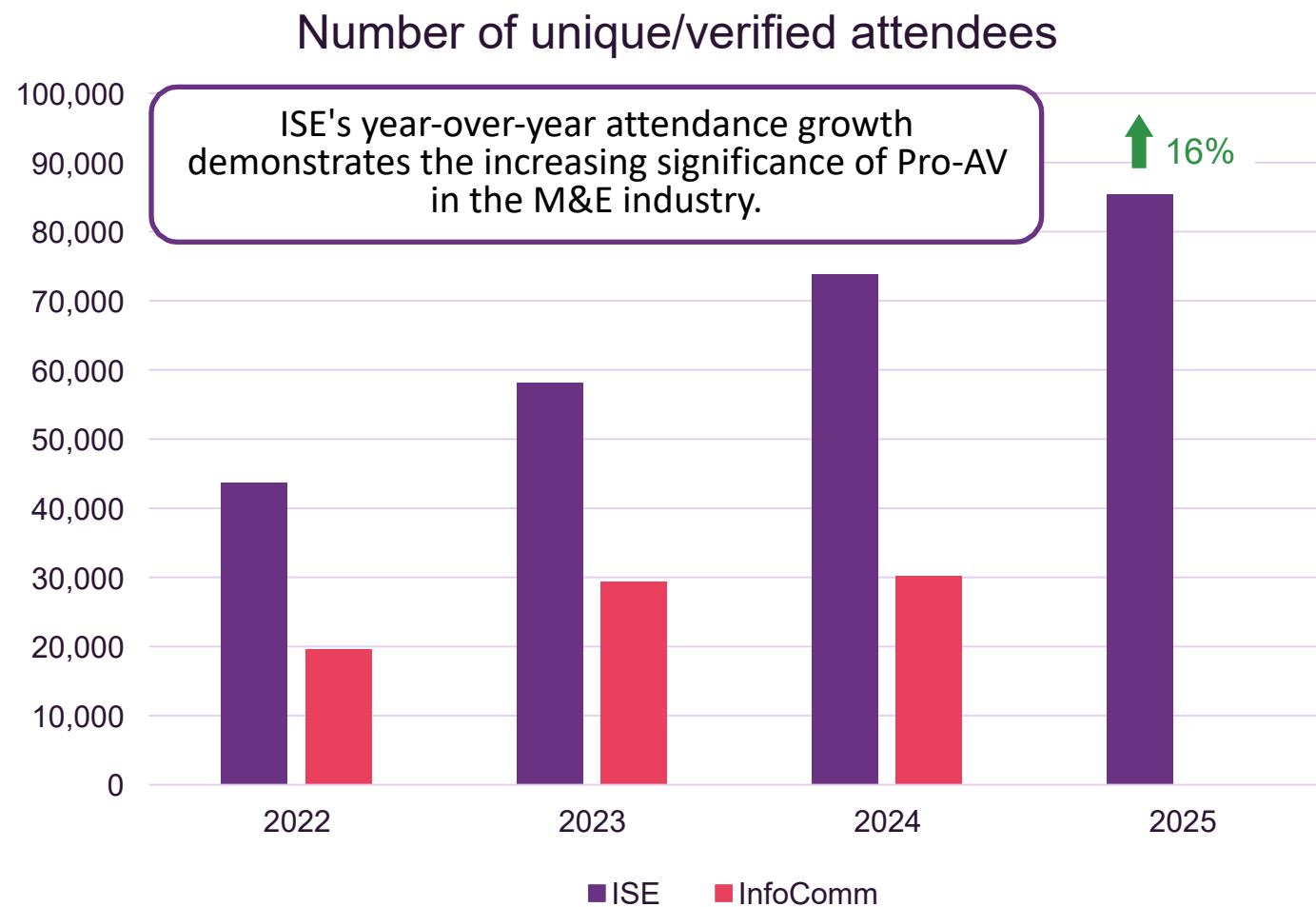
Suppliers' revenue segments



Q. What are your organization's revenue segments? (2024 n=81, 2025 n=67)

# MediaTech Convergence

ISE's growth demonstrates the increasing convergence of Pro-AV and broadcast sectors



Pro-AV supplier interview with  
Global Broadcast Industry News

*The professional AV market segment is a real growth driver for us. We bring decades of broadcast expertise to the world of pro AV, delivering innovative software-based solutions that combine rock-solid reliability with next-generation capabilities.*

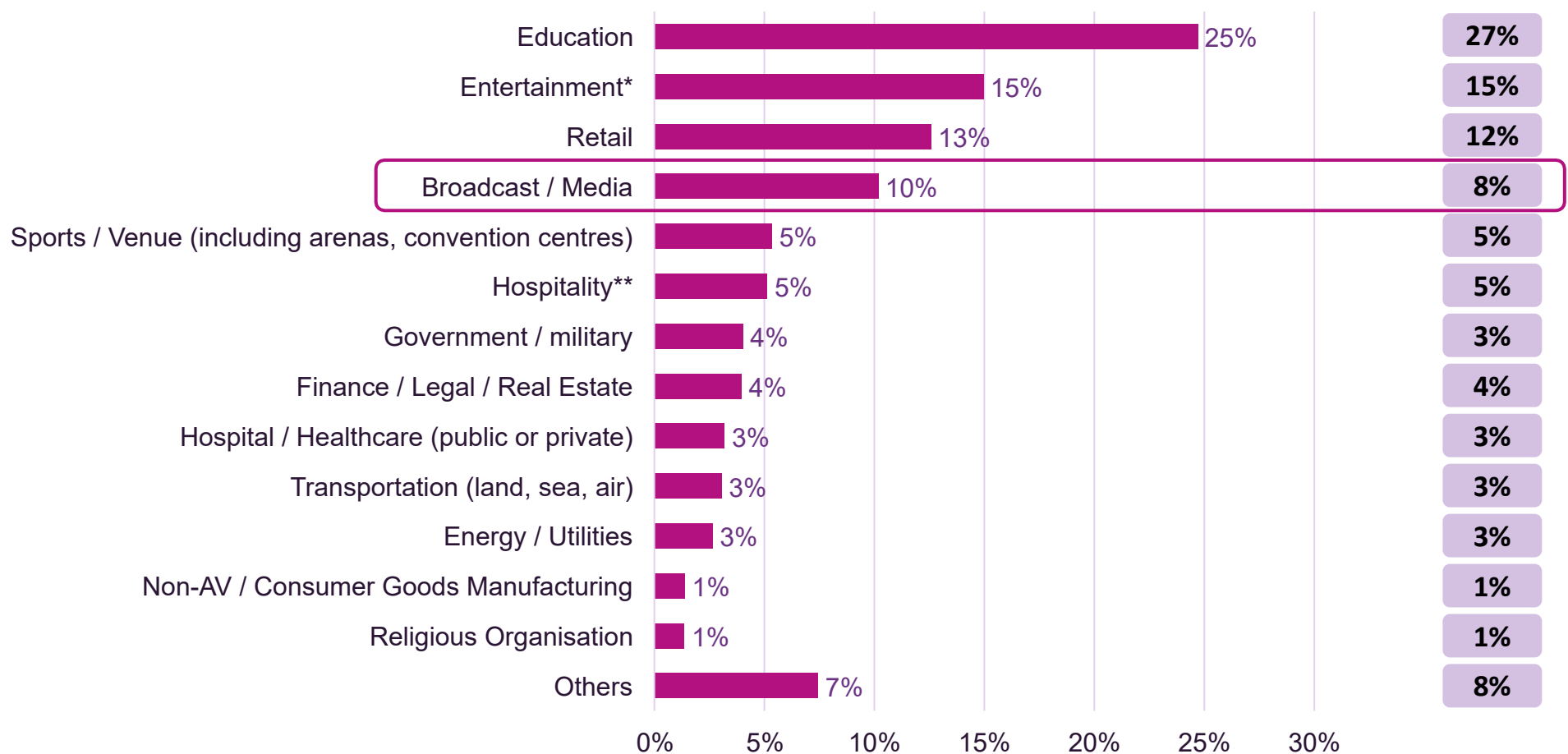
**Jan Weigner**  
**CTO at Cinegy**  
(January 2025)



# MediaTech Convergence

Broadcast / media end-users were the fourth largest group of buyers at ISE 2025

ISE 2025 End-User Attendance by Business Type (Top10) First Time Attendees



**28%** Of total attendees at Integrated Systems Europe 2025 were end-users.

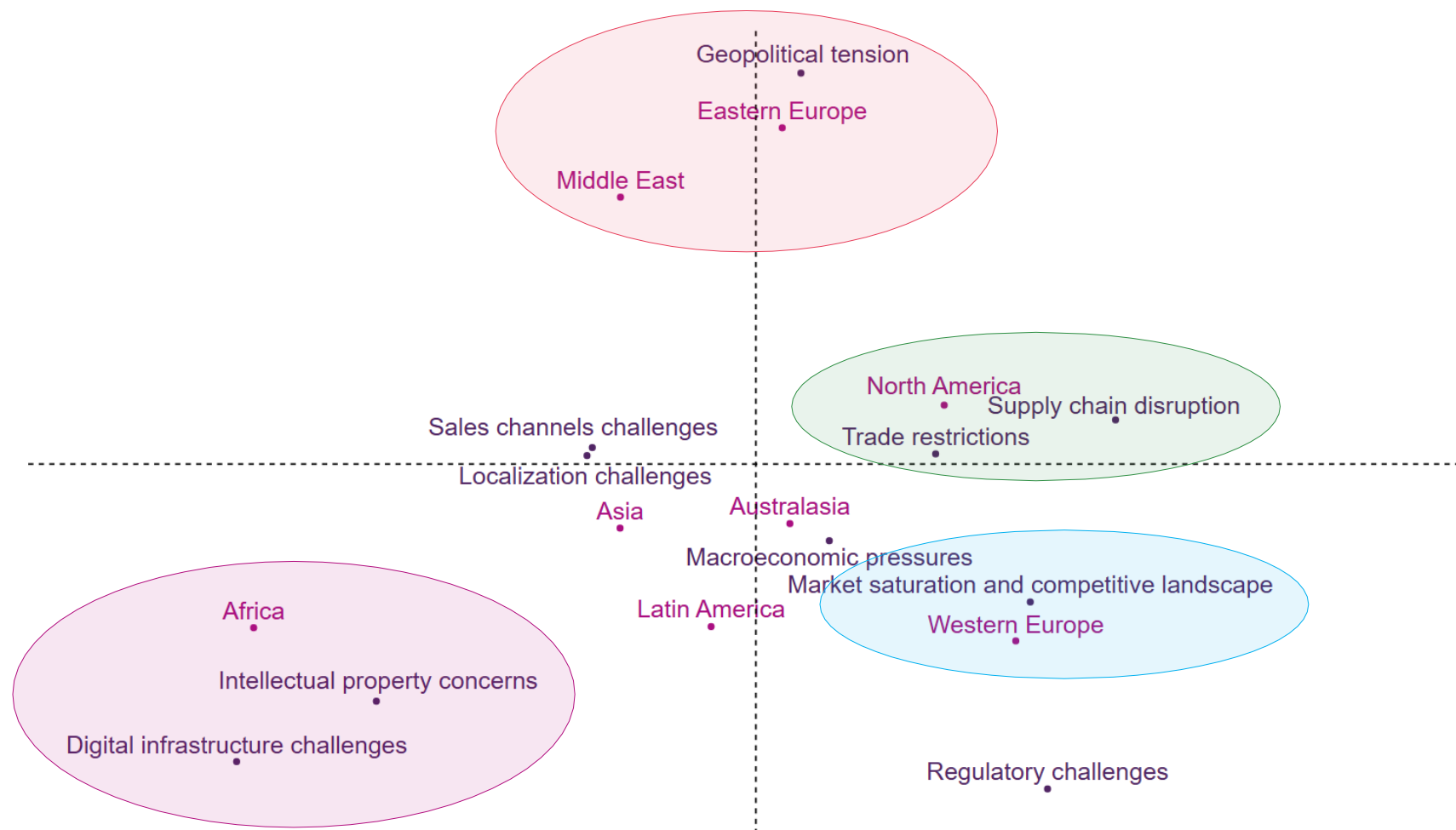
A significant percentage of first-time attendees in 2025 from broadcast / media made the category the fourth largest group of end-users in 2025.

\*Entertainment includes cinemas, theatres, museums, theme parks.  
 \*\* Hospitality includes hotels, restaurants, bars, casinos, cruise ships.

# MediaTech Resilience

Geopolitical tensions and market saturation hinder growth in some regions

Regional Barriers to Growth (Correspondence analysis)



Top 3 regional barriers to growth, average across all regions

**28%**  
Sales channels challenges

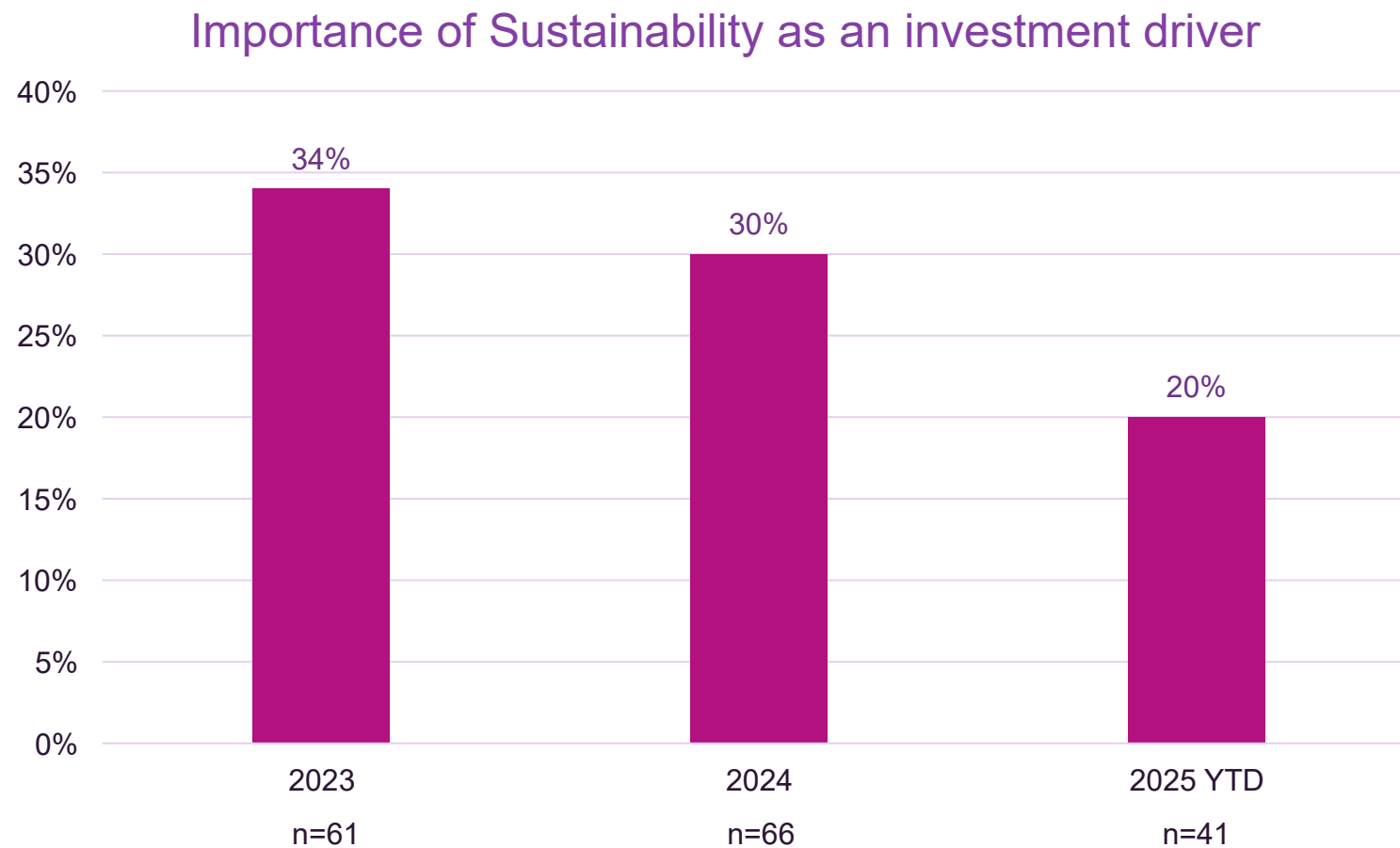
**17%**  
Market saturation and competitive landscape

**14%**  
Geopolitical tension

Q. What is the major regional barrier to the growth of your business in each of the regions where your company operates? (2025 YTD, n=425)

# MediaTech Resilience

Importance of sustainability as an investment driver continues to decline YoY



Q. In general, besides cost and technical specification, what are the most important factors that influence your decision to purchase media technology products and services? – Sustainability (Media/production companies)

**Sustainability**

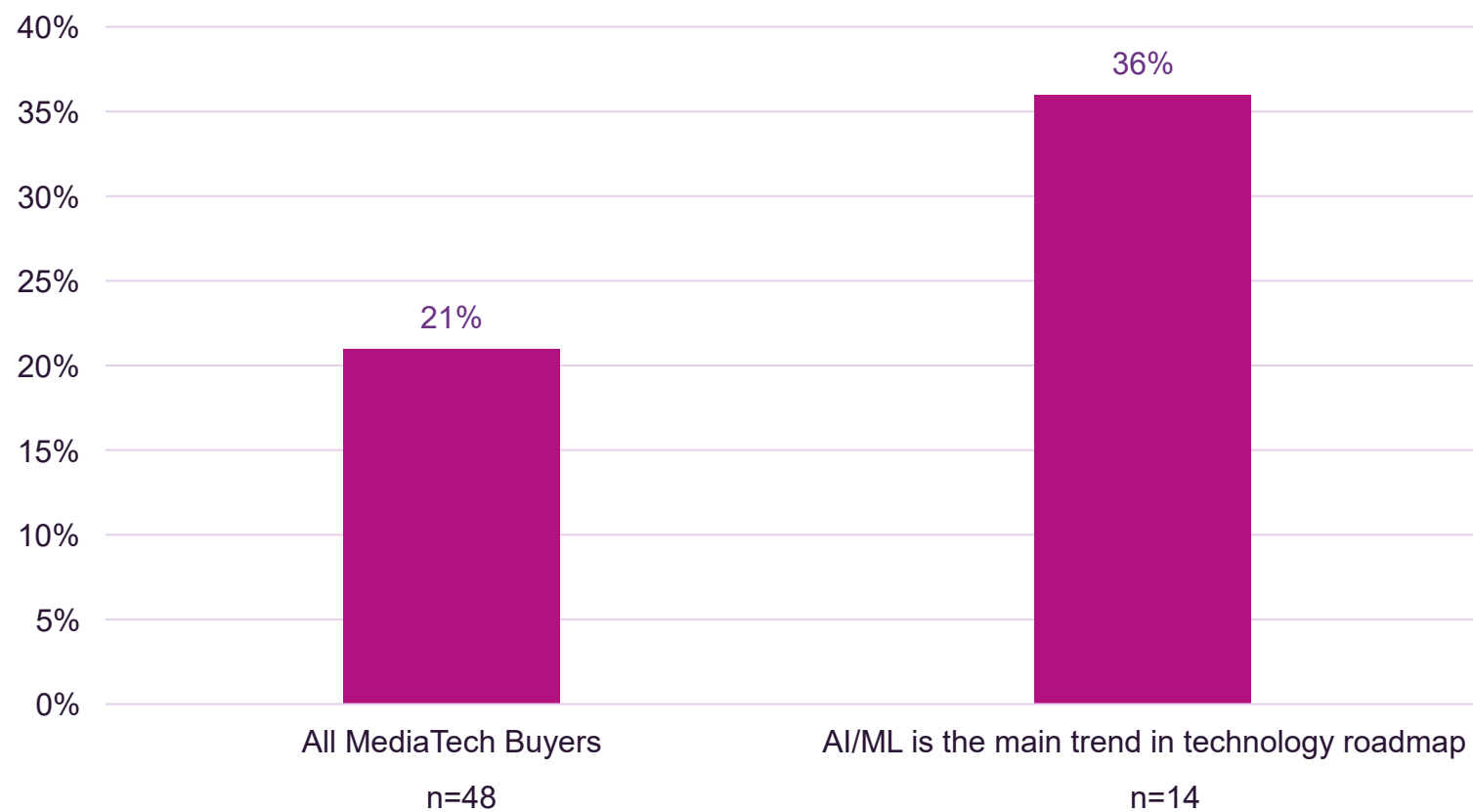
While many organizations are unified in their acknowledgement of the importance of sustainability, IABM survey data illustrates that it is prioritized as a driver of investment by a falling number of companies.

Ongoing research interviews frequently suggest that sustainable benefits are offered considered as secondary or a value-add factors in purchase decision making.

# MediaTech Resilience

Companies focusing on AI tend to prioritize sustainability in their buying decisions

Importance of Sustainability as an investment driver (2025 YTD)



**Sustainability**

MediaTech buyers who prioritize AI and machine learning in their technology roadmaps place a stronger emphasis on sustainability when making purchasing decisions.

Q. In general, besides cost and technical specification, what are the most important factors that influence your decision to purchase media technology products and services? – Sustainability (Media/production companies)

# Appendix

Additional information

# Additional Information

## More information about this report

- This report applies a hybrid research methodology combining both qualitative and quantitative data. Primary research data collected in IABM's MediaTech Industry Tracker is the main source of quantitative data in this report, however, to provide a comprehensive overview of the MediaTech market landscape, third party sources are also selectively used to evidence key trends. This includes quantitative data points from publicly available sources including structured and unstructured data points and quotes from industry executives. Qualitative insights and quotes are also included based on analyst led interviews from ongoing IABM Business Intelligence Unit research and reports.
- All sources used are reported at the bottom of each slide. Moreover, some slides include a brief explanation of the data manipulation steps adopted to better illustrate industry trends.
- If you have any feedback about this report, please contact: [insight@theiabm.org](mailto:insight@theiabm.org). We really appreciate constructive feedback as we always strive to improve our research.

# About IABM

Inform . Connect . Support

## Who we are

IABM is the independent, international organization that informs, connects and supports the entire MediaTech ecosystem.

## What we do

IABM helps make sense of the digital transformation happening in the Broadcast, Media & Entertainment technology landscape. We are the trusted, effective and influential source for business intelligence, engagement and skills development. We connect, share knowledge and promote collaboration.

## Our mission

To inform, connect and support the global MediaTech community.

## Our principles

- **Integrity:** we are independent, transparent and honest
- **Accountability:** we take responsibility for everything we do
- **Commitment:** we are dedicated to serving our members and the wider industry
- **Respect:** we value everyone equally
- **Collaboration:** we believe that working together is fundamental to success
- **Quality:** we continuously strive to improve everything we do

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Thank you for reading this report.