



GeoTracker

Tracking regional dynamics

Business Intelligence Unit, IABM, May 2025

18 April 2026

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About this report



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Tracker research family

Our tracking research spans three types of trackers

IABM tracking research comprises the three types of trackers listed below. This report presents the findings of the GeoTracker™, analyzing regional trends in different geographies and sub-regional MediaTech markets.

GeoTracker™

Analysis of trends in different geographies, covering 5 regions (NA, Europe, APAC, LATAM, MEA)

TechTracker™

Analysis of trends in different tech sectors covering 5 technologies (AI, Immersive, Cloud, Blockchain, IP)

ChainTracker™

Analysis of trends in different segments of the content supply chain, covering 9 segments

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 industry trends. Our methodology encompasses the following key components:

Primary Research

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

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.

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.

Research Methodology

Survey data provides quantitative insights into industry trends

The quantitative insights featured in this report originate from IABM's MediaTech Industry Tracker, a bi-annual survey conducted in the lead up to the National Association of Broadcasters Show Las Vegas in April and the International Broadcasting Convention in September since 2016. This report utilizes data collected by the IABM Industry Tracker survey from February 2021 to March 2025. The survey includes organizations of all sizes from both the vendor and end-user communities to provide a global outlook on the State of MediaTech.

Data periods reported in GeoTracker™

Year	First wave	Second wave	Sample size
2025	February-March	—	N=201
2024	February-March	July-August	N=303
2023	February-March	June-July	N=221
2022	January-February	June-July	N=217
2021	February	May-August	N=225



Median survey length: 15 minutes

Research Methodology



IABM's Global Engaged Partner Program provides insights from technology buyers

About the Global Engaged Partner (GEP) Program

- This report incorporates primary research with both technology vendors and end-users, including insights from IABM's Global Engaged Partner (GEP) Program. The GEP Program connects IABM with executives from organizations such as broadcasters, production companies, and corporate studios to align technology solutions with business goals.
- GEPs contribute through surveys, interviews, and events, providing valuable insights into end-user needs. Their input complements vendor perspectives, ensuring a balanced view of the market.

Methodology

- Expert interviews with GEPs formed a key part of this research. All GEPs interviewed were allowed the option of remaining anonymous or being attributed when direct quotes were used. These insights represent real-world challenges and priorities, ensuring the report reflects the needs of both vendors and buyers. In this report, direct or anonymized quotes from GEPs are marked as "GEP Insight".

Report Structure

This report includes an executive summary and regional chapters

- Snap Insights: The first section of this report provides a brief overview of key insights and a data comparison of different regions in parallel. Snap Insights can be read as an executive summary.
- GeoAnalysis: The main body of this report provides a detailed analysis of major regional trends affecting investment in MediaTech in five different geographies. This chapters also analyze region-specific dynamics and market fundamentals such as existing technology infrastructure and key stakeholders.

All sources used in this report are reported at the bottom of each slide. Some slides include a brief explanation of the data manipulation steps we adopted to better illustrate industry trends.



If you have any feedback about this report, please contact us at insight@theiabm.org. We would really appreciate it, as we always strive to improve our research.



Snap Insights

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Snap Insights

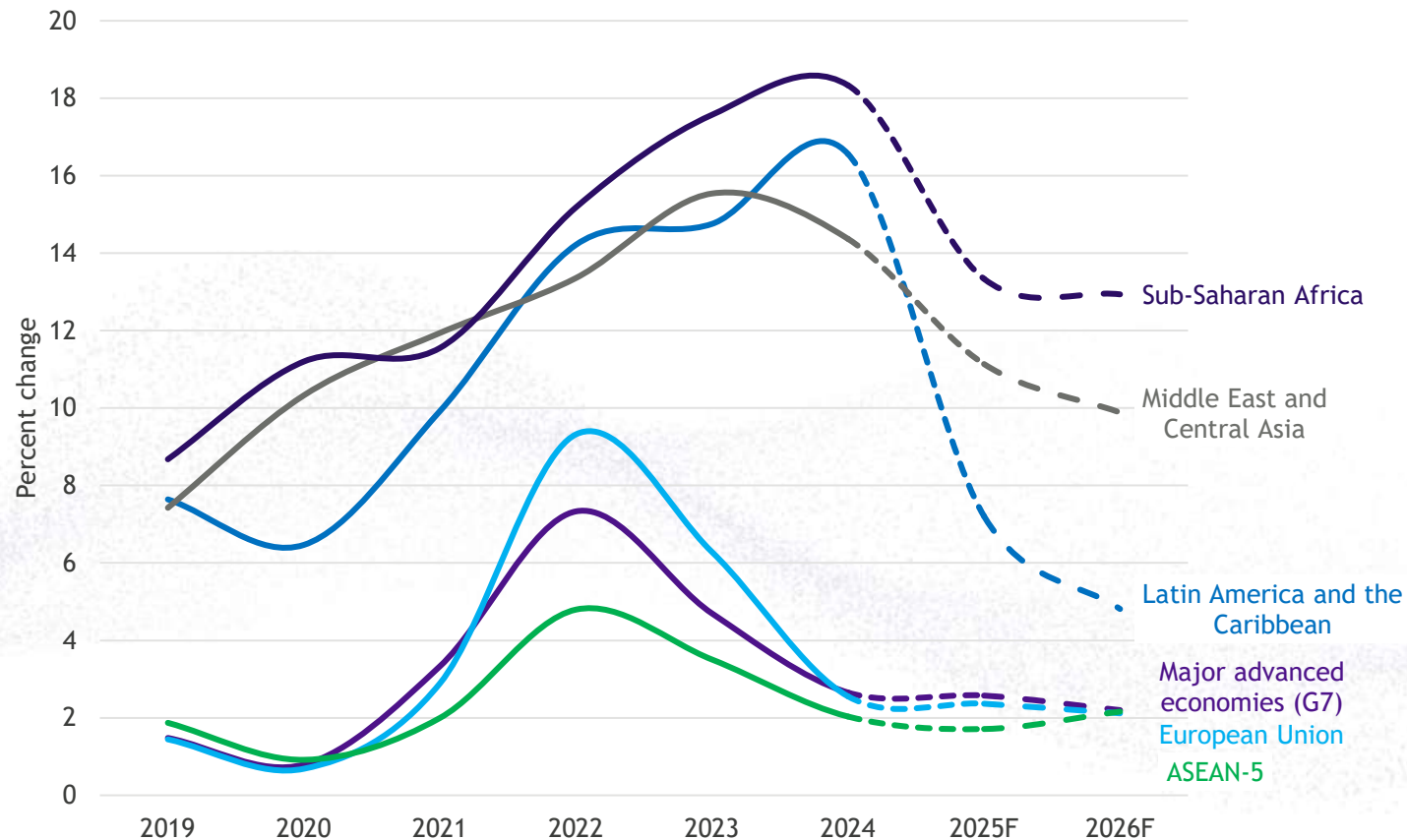
Summary of regional trends

Factors affecting MediaTech Investment

	Macroeconomics	Geopolitics	Emerging Tech	Society & Culture
North America	Cost pressures, fear of recession in 2025 due to uncertainty, tariffs	Increasing geopolitical tensions due to tariffs, affecting supply chains	Gen AI, live Cloud, open web technologies	Gradual recovery from Hollywood strikes, focus on live/niche sports, OTT
Europe	Cost cuts and layoffs, rate cuts improving investment environment	War in Ukraine, weak US-EU relationship/security infrastructure, tariffs	Live/hybrid cloud production, AI	Fragmented local markets, EU law, sustainability
Asia-Pacific	Moderate growth driven by low inflation, improved productivity, consumption	Increasing geopolitical tensions, US-China trade war, military practices	AI, Cloud, mobile-only streaming, 5G, live sports on social media, ad tech	Mobile economy, trending Korean content, social media platforms
Latin America	Inflation, poverty/low income stagnating consumption/investment	US trade policies, China's increasing FDI in LA	Next-Gen TV (TV 3.0), mobile OTT, 5G, live sports	Young population, limited network infrastructure, low purchasing power
Middle East & Africa	Low oil prices, improving inflation, economic reforms (Saudi Vision)	Ongoing conflicts, regional politics	OTT, mobile-only streaming, 5G	State-driven media sector lack of skillsets and ambition to innovate, piracy

Inflation in MEA and Latin America is projected to drop, while global growth remains slow

Inflation rate, average consumer prices



Macro Trends

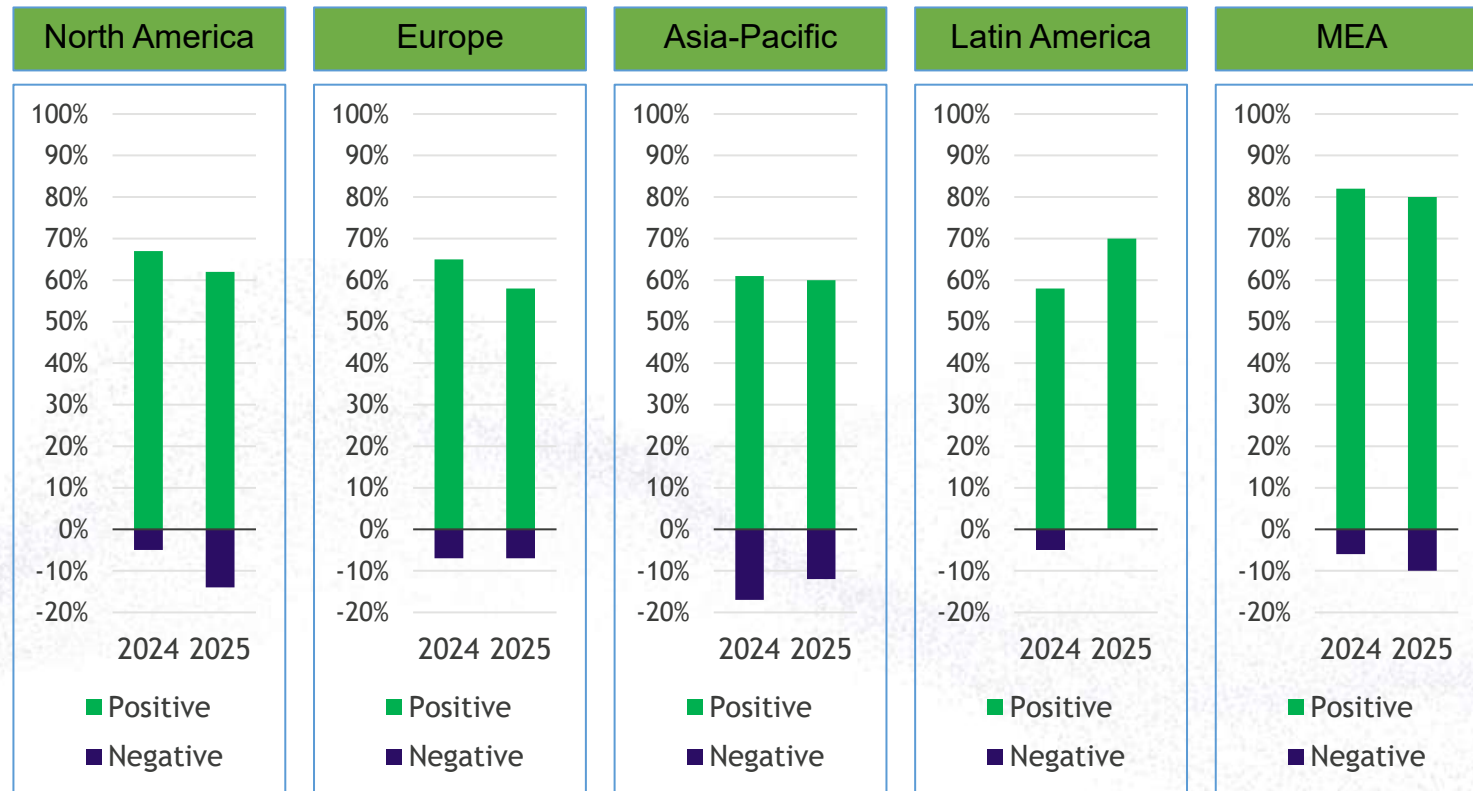
Global inflation is expected to slow down, driven largely by moderating energy and goods prices. However, ongoing geopolitical uncertainty continues to constrain the world economy's growth outlook.

In the MENA region, inflation is projected to decline unevenly across countries. In Sub-Saharan Africa, inflationary pressures persist, but the average rate is expected to fall from 18.3% in 2024 to 12.9% in 2025-2026, supported by tighter monetary policy.

Latin America is undergoing broad-based disinflation, with regional inflation forecast to drop from 16.6% in 2024 to 7.2% in 2025. Central banks in both Africa and Latin America are maintaining elevated interest rates to anchor inflation expectations.

Business environment outlook by region

Business Environment Outlook



Business Confidence

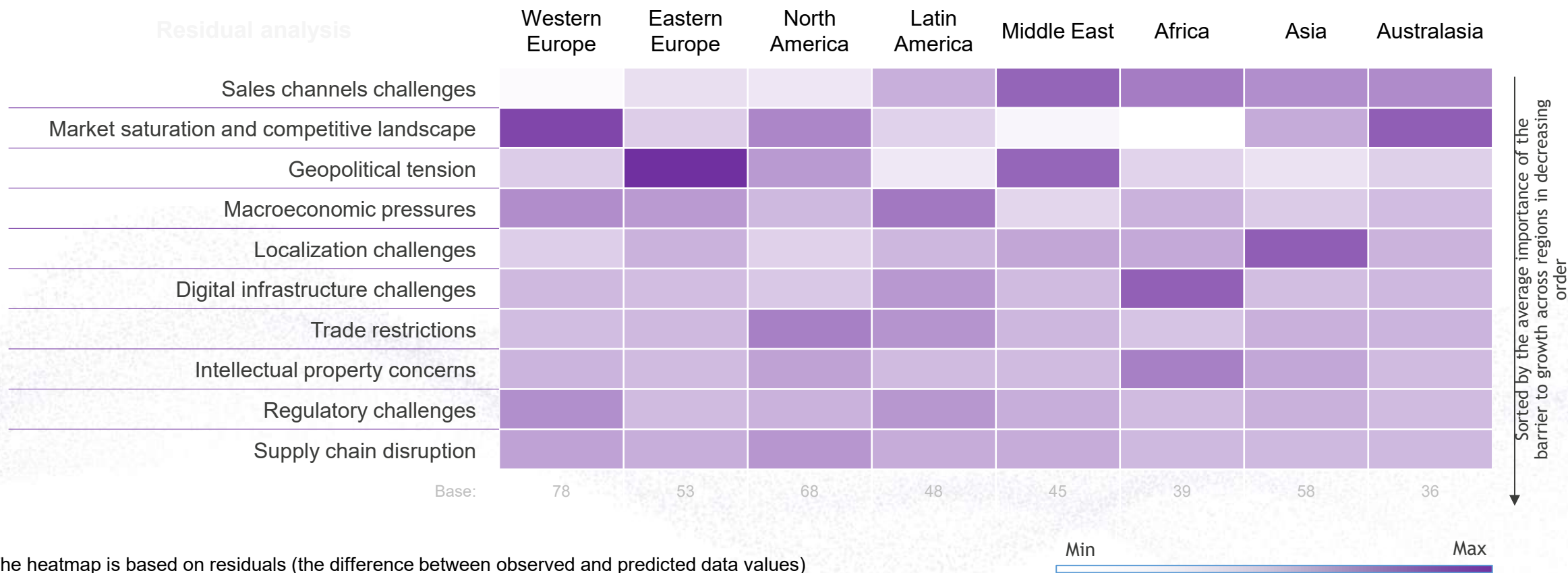
The business environment outlook in North America and Europe deteriorated in 2025, falling from 67% to 62% (YoY) and from 65% to 58% (YoY), respectively. In contrast, business confidence in Latin America improved by 12% points (YoY). Confidence levels in other regions remain relatively stable, though uncertainty has increased in Asia-Pacific due to foreign trade policies and geopolitical tensions.

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

Source: IABM

Snap Insights

Sales channels challenges are the main regional barrier to growth



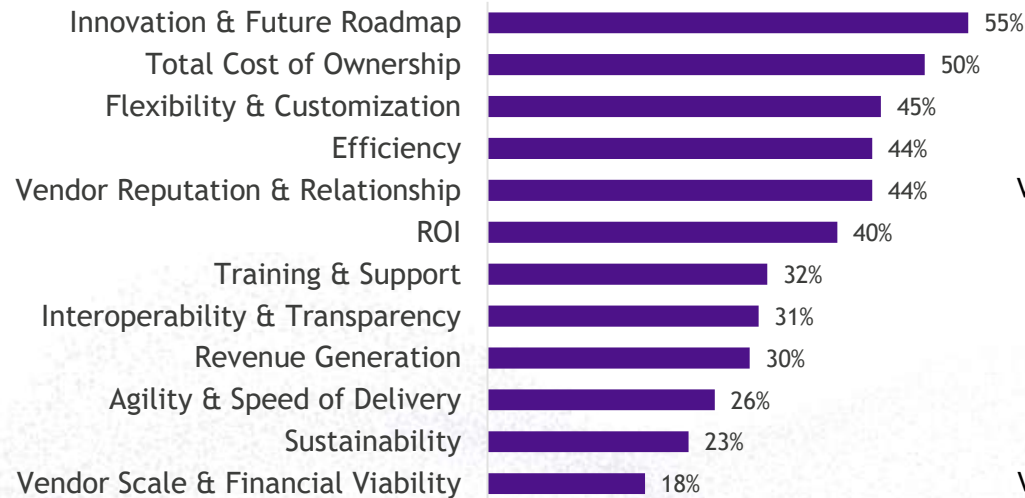
The heatmap is based on residuals (the difference between observed and predicted data values)

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

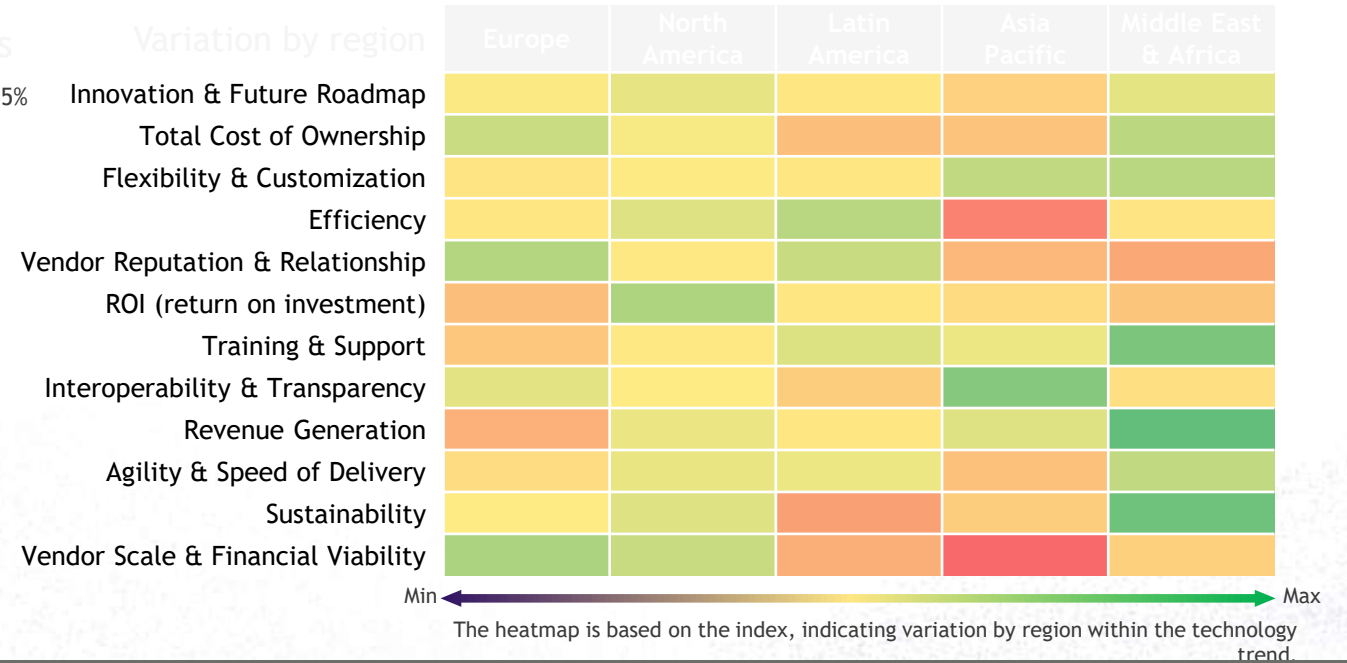
Snap Insights

Innovation and TCO are the most important purchasing factors for MediaTech buyers

Trends in technology roadmaps



Variation by region



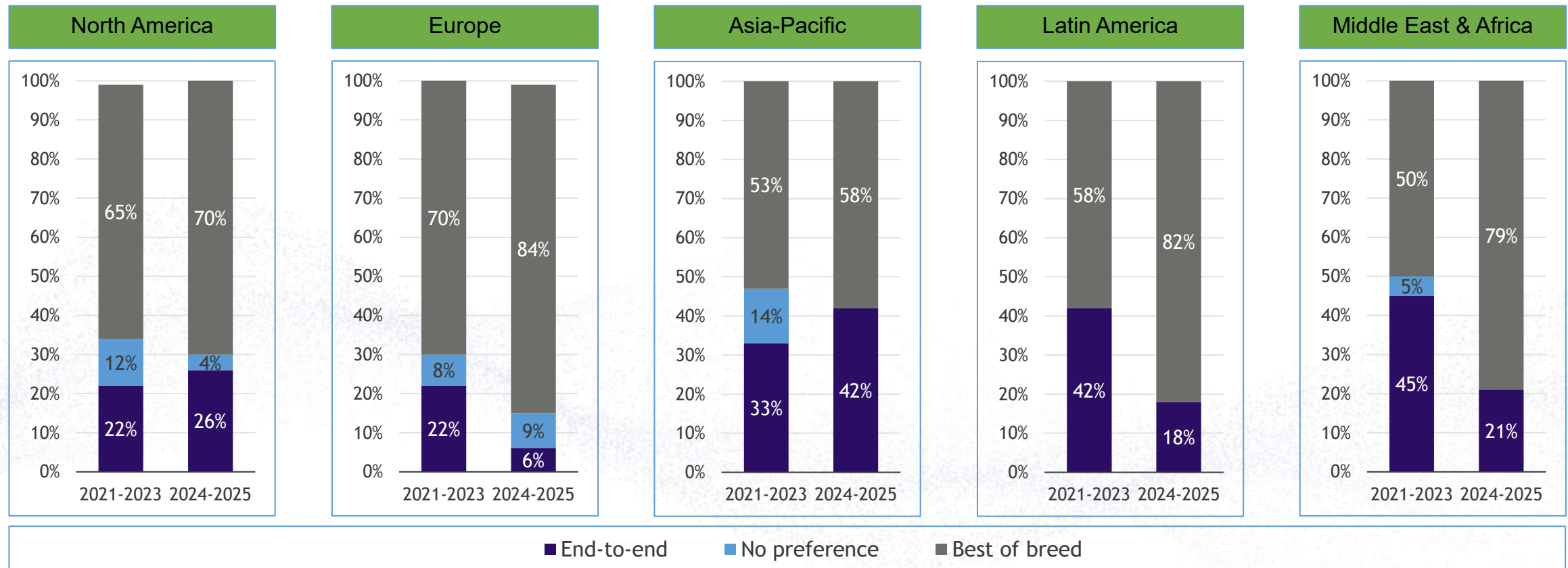
Purchasing drivers vary significantly by region. In North America, decisions are primarily influenced by return on investment. In Europe and Latin America, vendor reputation and existing relationships play a more critical role. In Asia-Pacific, interoperability and flexibility/customization stand out as top priorities, while buyers in the Middle East and Africa focus more on revenue generation, training and support, and sustainability when selecting media technology.

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? (MediaTech buyers 2024-2025)

Source: IAMT

Despite APAC's shift towards managed services, best of breed is still top preference

Media technology buying preferences



Q. When purchasing media technology products, which do you generally prefer? (MediaTech buyers) End-to-end: “To purchase a complete system from an end-to-end solution provider that provides most or all the products we need”; Best of breed: “To evaluate multiple suppliers and create a “best of breed” solution.”

Regional trends in North America - Summary

Macro Trends

Macroeconomic Pressures

The business environment outlook deteriorated in North America in early 2025, affected by geopolitical tensions and trade restrictions.

Production Relocation

Hollywood productions are increasingly relocating offshore, driven by financial pressure exacerbated by post-strike labor cost increases and shrinking production budgets.

Talent Shortages

The shift to cloud and AI requires new skillsets, such as software engineers, cloud architects, and AI/ML specialists, which are scarce within traditional M&E talent pools.

Business Trends

Profitability

Major streaming services are focusing on improving profitability through price hikes, expansion of ad-supported business models, and strategic investment in sports rights.

Social Media

Daily use of social media has surpassed traditional media in North America, particularly in the US, driving investment in short-form content and vertical video formats.

Managed Services

Managed services are growing rapidly as media businesses address talent shortages and complexity. Vendors now offer long-term licenses and CapEx models for SaaS projects.

Technology Trends

Live Cloud Production

The adoption of live cloud/hybrid production is enabling innovation in media businesses, especially for lower-tier content.

IP & Software-Based Production

Media companies in North America are increasingly adopting IP-driven and software-based workflows to increase efficiency, flexibility, and enable collaboration.

Generative AI

Hyperscalers are investing in ARM-based custom silicon to meet the growing demand for AI. The use of Gen AI is raising provenance and authenticity concerns.

Regional trends in Europe - Summary

Macro Trends

Macroeconomic Uncertainty

The European business environment outlook remains stable, though with increasing signs of uncertainty. Macroeconomic pressures and geopolitical tensions continue to constrain business growth in the region.

Cost-Cutting

The economic uncertainty has prompted media businesses to implement cost-cutting measures and layoffs, though recent interest rate cuts have created a more favorable climate for investment.

Talent Shortage

Cultural resistance to change and the lack of required skillsets are significant barriers hindering media companies' business transformation in Europe.

Business Trends

Profitability

Broadcasters' digital-first strategies are yielding results, boosted by strategic cost reductions and an expansion of ad-supported offerings that drive both audience reach and profitability.

New Business Models

Social media platforms, such as YouTube, provide broadcasters with effective channels to reach younger demographics and niche audiences.

Partnerships

European broadcasters are increasingly forming strategic alliances with streaming services to strengthen their digital presence and remain competitive in a rapidly evolving media landscape.

Technology Trends

Live Cloud Production

Media organizations are embracing live cloud and hybrid production solutions to enhance operational efficiency, boost revenue streams, and strengthen audience engagement.

Artificial Intelligence

The push for greater efficiency and innovation is driving rapid adoption of AI/ML across Europe. However, security concerns remain a significant barrier to AI adoption.

Democratization

The increasing accessibility of media technology, especially through cloud-native and user-friendly tools, is playing a pivotal role in accelerating the growth of the creator economy.

Regional trends in Asia-Pacific - Summary

Macro Trends

Macroeconomic Pressure

Business confidence in APAC remains stable, though uncertainty has increased. China's economic slowdown is negatively impacting the entire region.

Regional Diversity

The APAC region is highly diverse, with dynamic markets in China and India, while the Japanese market remains conservative in terms of technology investment.

Sales Channels Challenges

APAC markets face growing market saturation and experience sales channel difficulties. Increasing geopolitical tensions and the trade war between China and the US is increasing supply chain risks.

Business Trends

Local Content

The OTT market continues to grow, driven by investment in premium local content and cheap mobile data. Investment in Korean content is fuelling its popularity in SEA.

Mobile Streaming

India's growing demand for mobile streaming and high-quality online video has transformed it into a major APAC production hub for both Bollywood and Hollywood films.

Live Sports

Chinese social media platforms are investing in sports rights and enhancing fan engagement through interactivity and immersive experiences.

Technology Trends

Streaming & Social Media

Social media and mobile are maturing in MediaTech roadmaps, while premium OTT is experiencing strong growth.

Artificial Intelligence

AI is playing an increasingly vital role in the region, though investment is being affected by tariffs, geopolitical tensions, and the launch of DeepSeek.

IP

The transition to IP is a major trend in Japan and South Korea, with many media companies currently purchasing test equipment, though a lack of IT engineers is slowing down IP adoption.

Regional trends in Latin America - Summary

Macro Trends

Business Confidence

Business confidence in Latin America improved relative to 2024, with no negative expectations for the year ahead.

Investment Growth

Favorable economic conditions are fueling the expansion of 5G networks and driving streaming service growth, as streaming platforms boost their investment in local content.

Sales Channel Challenges

Sales channel difficulties and mid-term economic headwinds are hindering Latin American growth. However, the FIFA World Cup 2026 in Brazil is creating demand for new technology trials and sales.

Business Trends

New Revenue Streams

Media companies in Latin America are diversifying revenue streams through ad-tech innovations, hyper-personalization, and interactivity. Brazil is pioneering TV 3.0 adoption.

Partnerships

Strategic partnerships are driving the future of sports media. Content bundling and distribution partnerships with telecom operators simplify direct billing.

Piracy

Piracy remains a significant challenge for sports rights holders in Latin America, with the region having some of the highest rates of illegal streaming and content sharing globally.

Technology Trends

Artificial Intelligence

Latin America has emerged as a key market for AI adoption. AI is increasingly used for content personalization, automated editing, real-time analytics, and fan engagement.

Interoperability

Broadcasters in the region are adopting hybrid cloud workflows, driving increased demand for modular, interoperable cloud tools.

Security

Rising piracy and cyber threats, particularly in live sports, are driving investment in advanced security solutions, such as AI-powered monitoring, digital watermarking, and real-time takedown tools.

Snap Insights

Regional trends in Middle East and Africa - Summary

Macro Trends

Business Confidence

Business confidence remains resilient, underpinned by strategic media investments, sporting event-driven growth, and Saudi Arabia's leadership in regional economic transformation.

Regional Diversity

Sub-regions vary significantly, with key differences between GCC oil economies and Sub-Saharan Africa. The Levant faces challenges from regional conflicts and instability.

Sales Channel Challenges

The region faces significant macroeconomic challenges linked to declining crude oil prices and sales channel complexities due to market fragmentation.

Business Trends

Profitability

Streaming services are strategically focusing on profitability through boosting advertising revenue, investing in local content and live sports, and enhancing viewer engagement.

Sports Rights

Gulf governments and media groups are investing heavily in sports broadcasting rights, while Saudi Arabia, the UAE, and Qatar frequently host major international sporting events like F1, football, and boxing.

Piracy

Increased organized piracy and strict content restrictions are driving demand for security, DRM, and video analytics.

Technology Impact

OTT & Social Media

Streaming has become a key trend in GCC countries, driving investment in vertical video formats optimized for mobile and social platforms to reach younger audiences.

Immersive

The increasing value placed on live sports by Gulf media companies is prompting them to adopt immersive technologies to enhance viewer experiences and differentiate their offerings.

Cloud & IP

The adoption of cloud and IP technologies is accelerating. However, the lack of skillsets, and government-funded media companies' fixed budgeting cycles still favor CapEx investment.



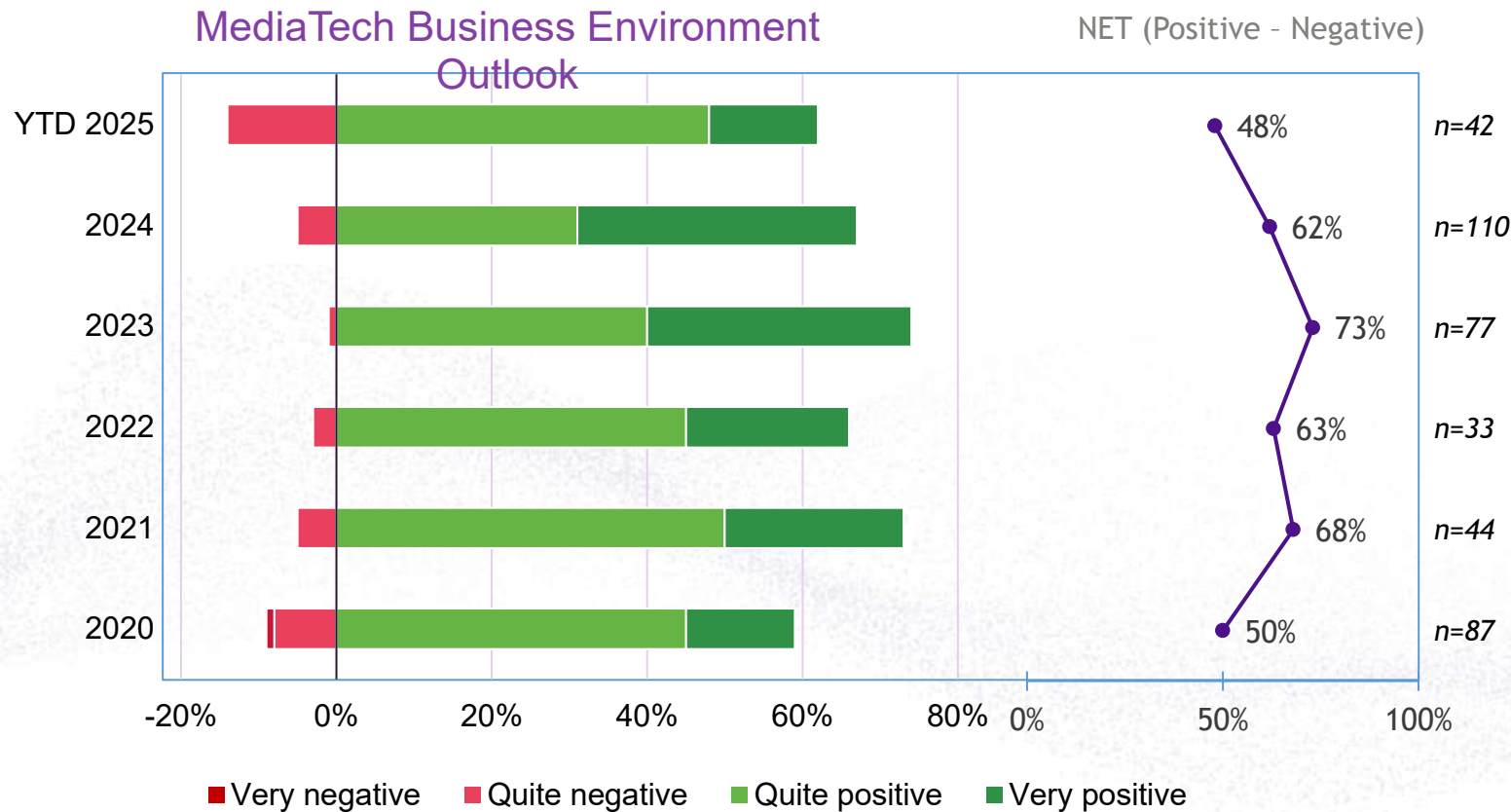
GeoAnalysis – North America

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North America - Business Environment



The business environment outlook has slightly deteriorated since last year



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

Business Confidence

Business environment outlook worsened in North America at the beginning of 2025: the percentage of respondents who have a negative perspective increased from 5% to 14%, while the "very positive" outlook declined from 36% to 14%.

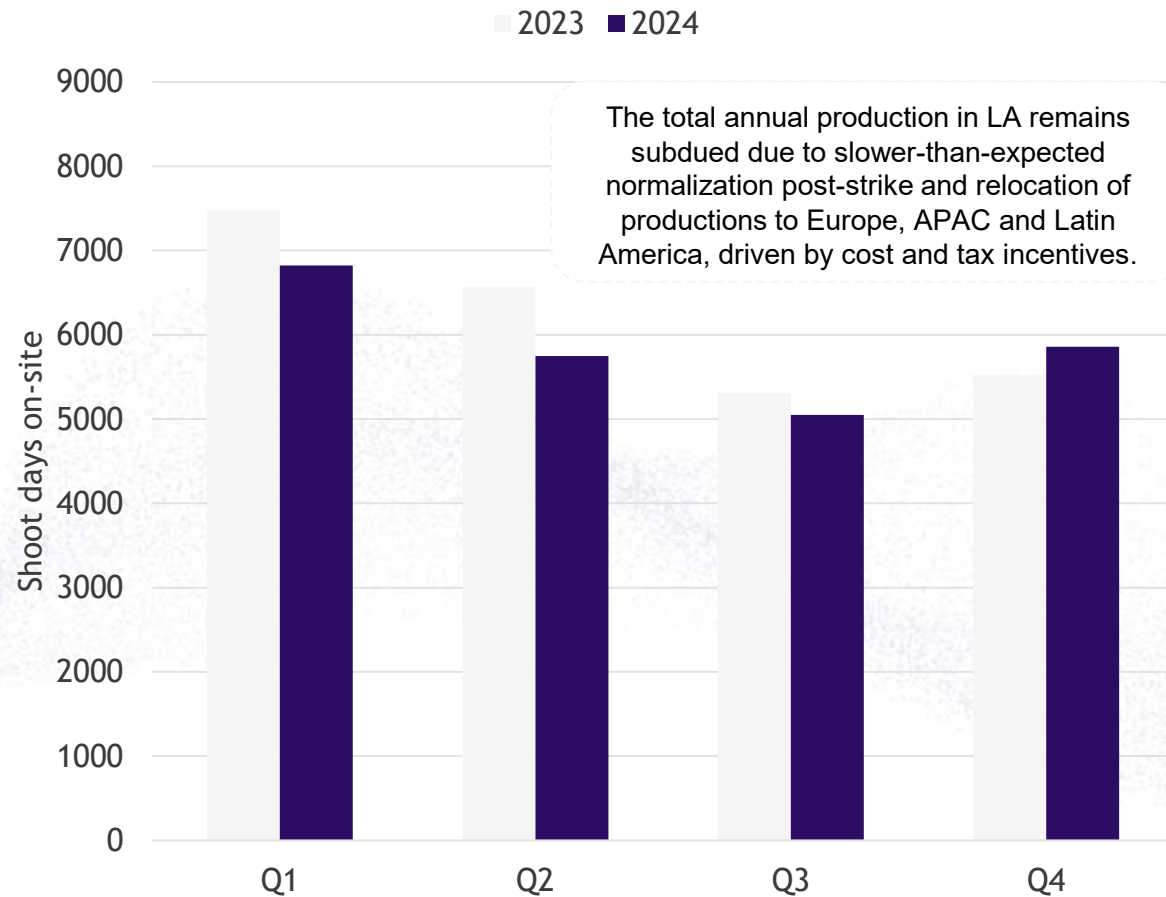
This decline can be attributed to macroeconomic pressure, fear of recession in 2025, the increasing geopolitical tensions, and the threat of new tariffs.

North America – Business Environment

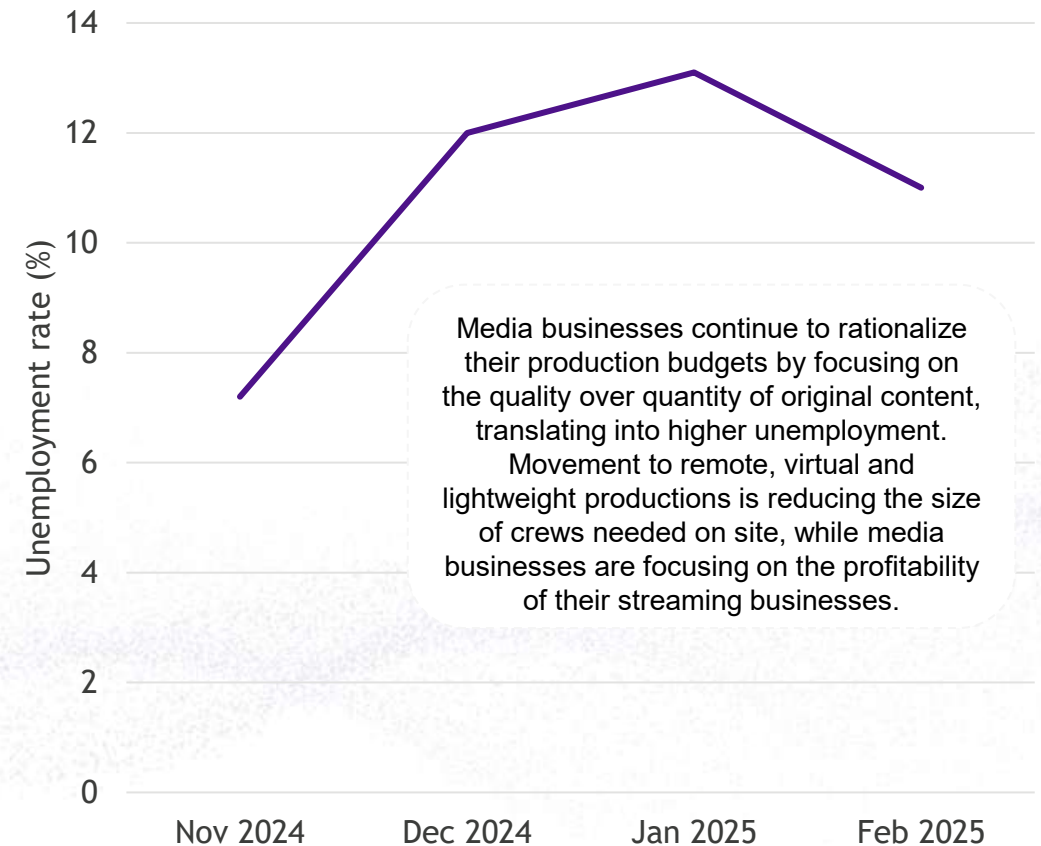


Hollywood productions continue to relocate offshore despite gradual post-strike recovery

Total shoot days in Los Angeles



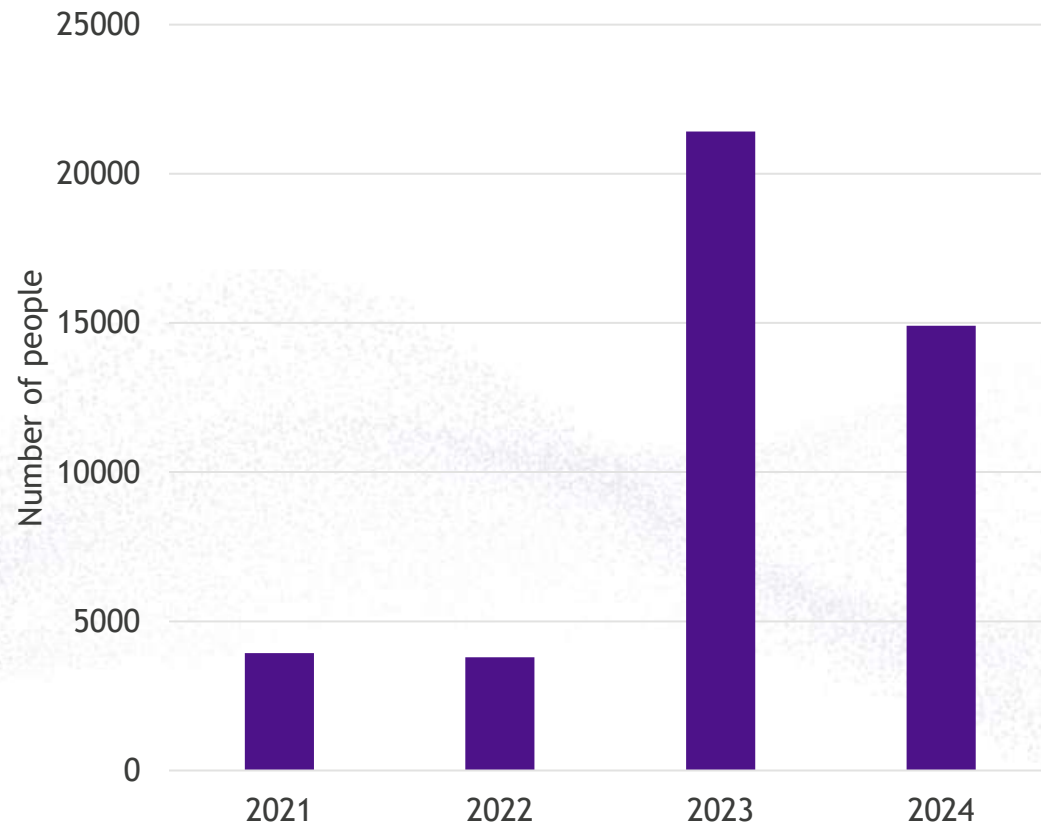
Unemployment rate in the US motion picture and music recording industries



North America – Business Environment

Cost pressures are translating into layoffs and dictating tech budgets with focus on efficiency

M&E layoffs in the US 2021-2024



MediaTech supplier in an IABM interview

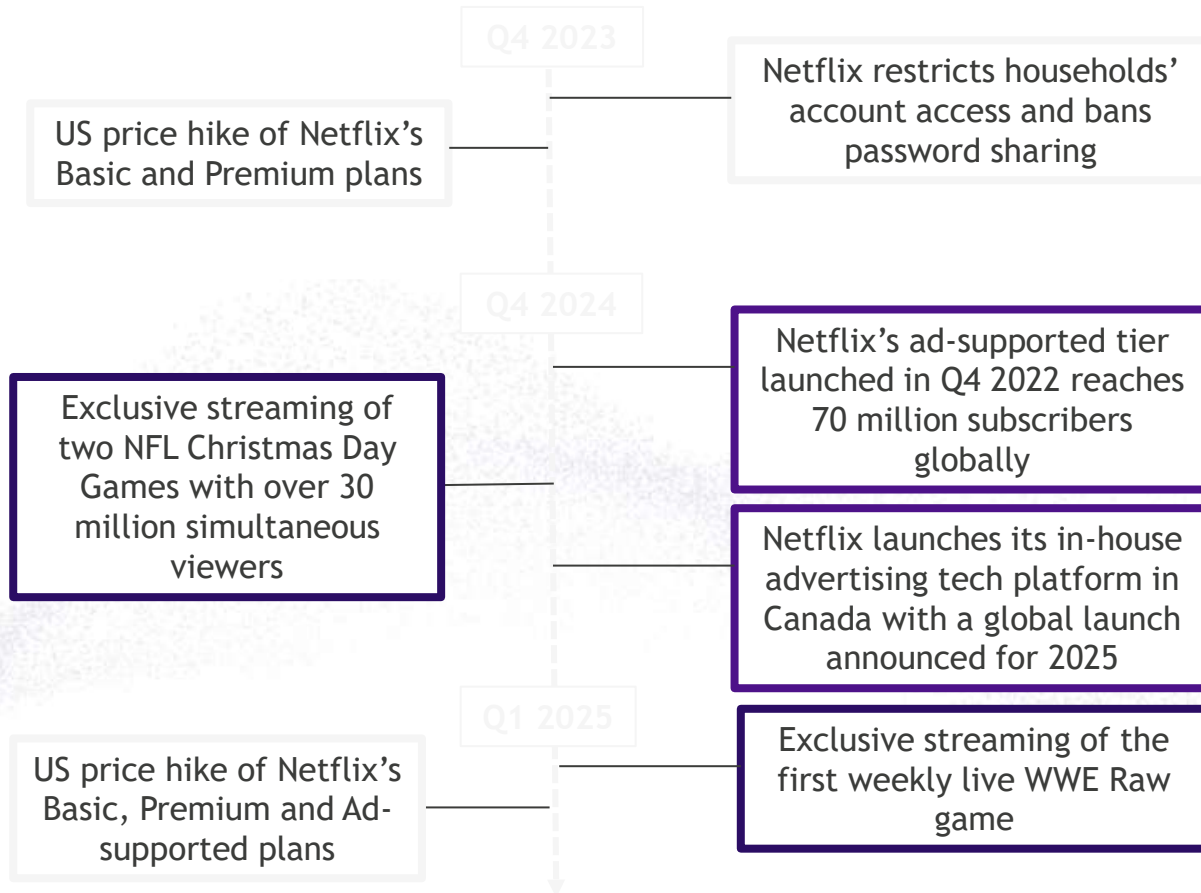
*The main issue is the **market itself**, which is just **over** in the bigger picture. It seems like there's more bad news daily versus good news. The big challenge is **losing people** and **budgets** so companies will have to make difficult choices – are they going to upgrade their infrastructure or are they going to just continue with what they have? [...] It's really the **streaming wars** that are happening. There has been a lot losers to that. The people that were flying high a couple of years ago are now part of contributing to the issues that we're seeing today. Those issues sort of **delay** a little bit the **advancements** in technology.*

Technology supplier
North America
(February 2025)

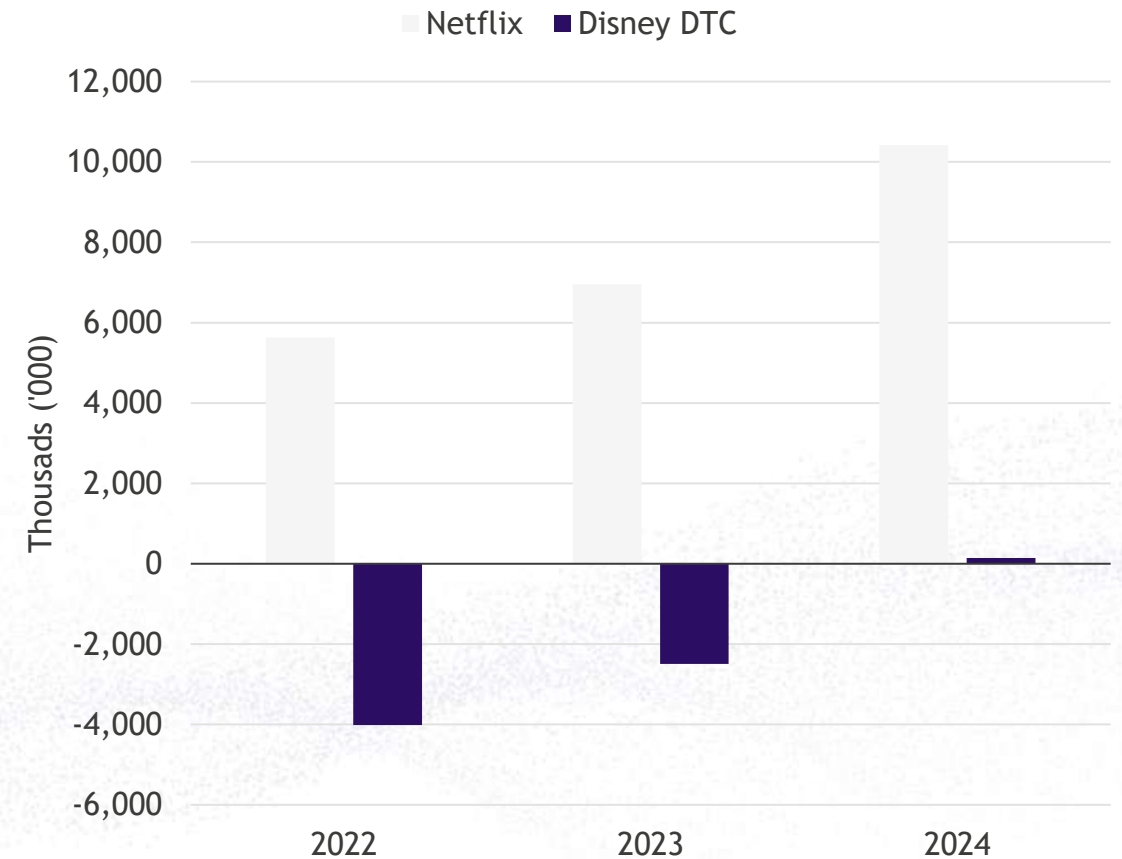
North America – Business Transformation **iamt**

Major streaming services improve profitability, driven by price hikes, live sports and advertising

Netflix's initiatives to improve profitability



Operating income - Netflix vs Disney DTC



North America – Business Transformation **iamt**

Media businesses are boosting viewer engagement through convergence with gaming IP

Recent examples of convergence in media businesses



After having acquired \$1.5bn stake in Epic Games in Q1 2024, “Fortnite” hosted a livestream of Disney’s D3 fan event inside the game in Q3 2024.



WBD announced that it will consolidate its Global Themed Entertainment licensing group and its Studio Tours & Retail group under one umbrella to “expand fan-facing experiences and pursue new businesses”.



Amazon Prime’s TV series adaptation of the video game series Fallout release in Q2 2024 became its second-most-watched title of all time with over 65 million viewers in the first 30 days, generating revenue through an ad-supported tier.



HBO Max adapted The Last of Us video game series into a TV show in 2023 which became one of HBO Max’s most-watched shows by leveraging the existing fan community of the game to create an engaged viewership around the TV adaptation.



NETFLIX

Netflix announced in its Q4 2024 earnings call that it plans to offer “couch co-op and party games” that it will stream over the cloud to TVs. The beta version of the gaming offering has been under testing since 2023.

MediaTech supplier in an IABM interview

*We see **convergence** being the defining trend that’s going to shape our entertainment world over the next couple of years. Our customers are focusing on more **interactive and live** experiences, embracing streaming through **social media** and they’ve been doing that for a while, but they are also experimenting with these new forms of **IP monetization**.*

Steph Lone

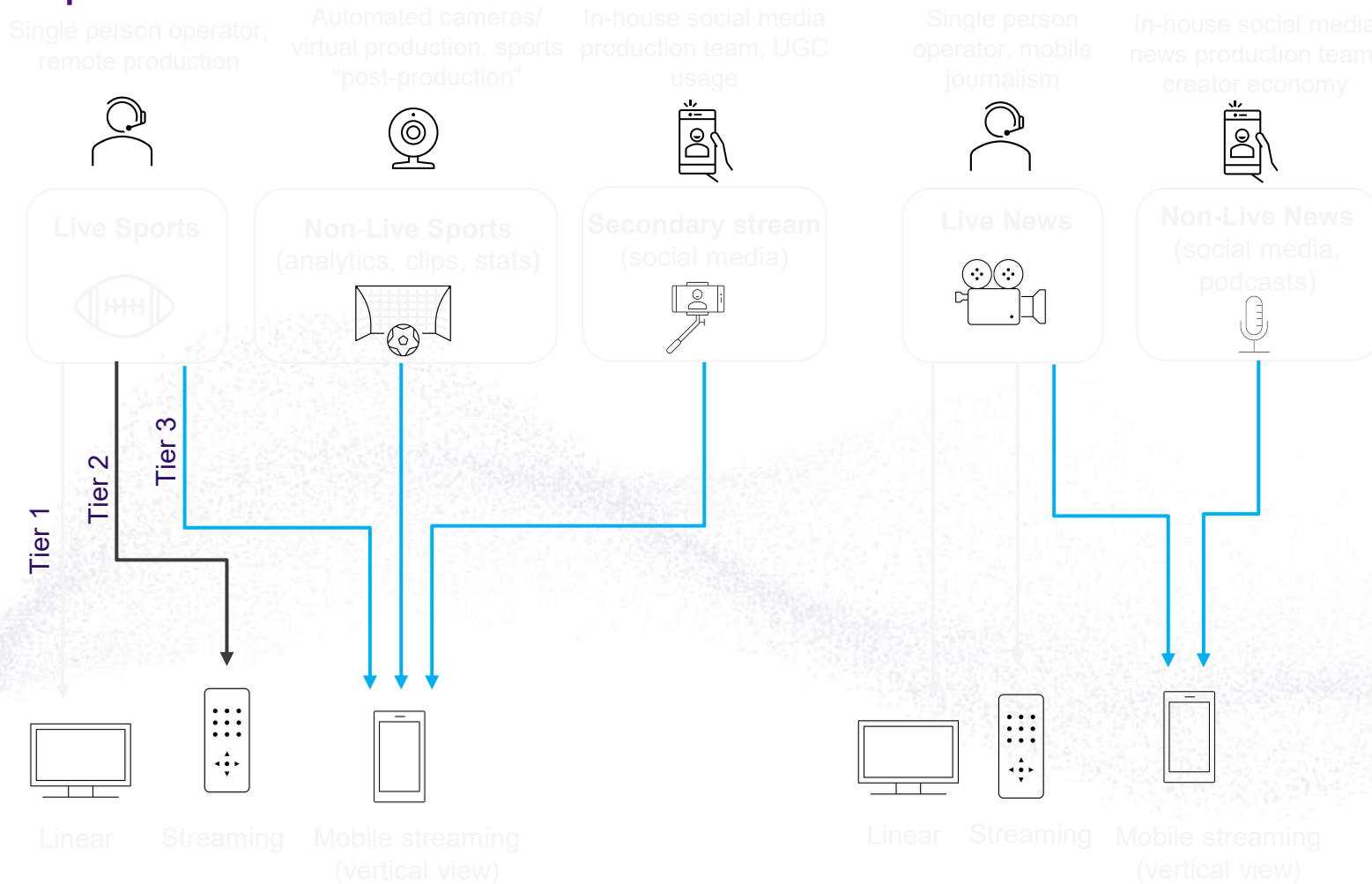
Global Director, Solutions Architecture,
Media & Entertainment, Games and Sports

AWS

(February 2025)

North America – Business Transformation **iamt**

Media businesses are targeting distributed audiences with more niche content on multi-platforms

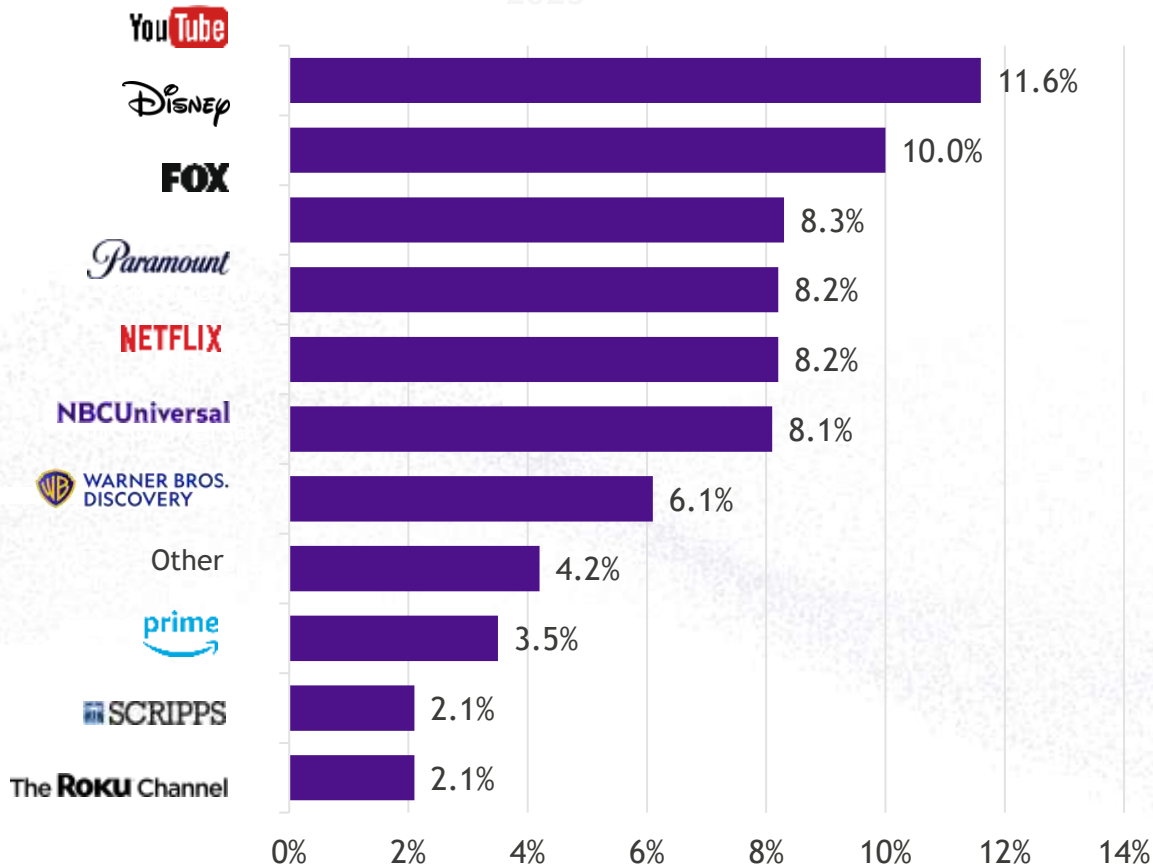


*Streaming just keeps ticking up. We see that with all those major events, the most recent one in the US being the **Super Bowl**. There's no second screen anymore. It's more that we've got our main screen, but we still **actively engage across multiple screens**. So, we're not saying anymore that **phones** are a minor thing – that's where that **all sits**. That's the power of streaming.*

Geoff Gordon
VP of Global Marketing
MainConcept
(February 2025)

Social media is ahead of media companies in monetizing the creator economy and SME brands

TV share of total US watch time by media company - Feb 2025



Annual letter from the YouTube CEO - Feb 11th 2025

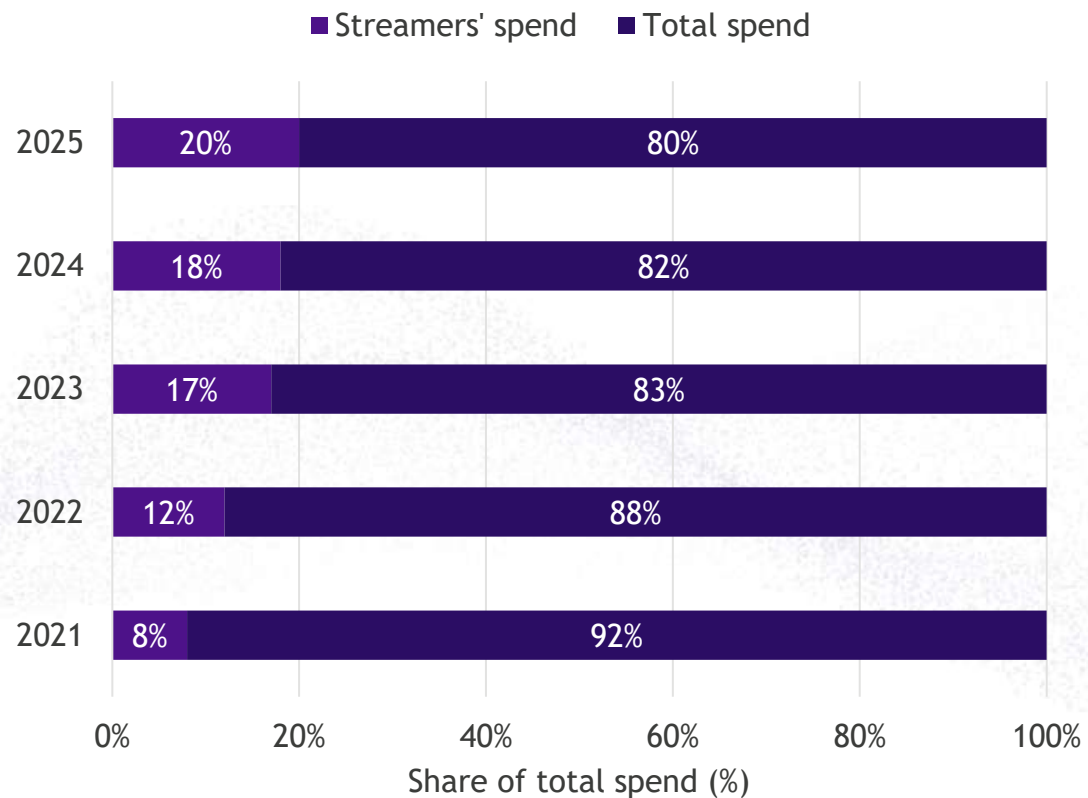
TV has surpassed mobile and is now the primary device for YouTube viewing in the US [...] As more creators produce content for the big screen, we're bringing the best of YouTube to TVs, including a second screen experience that lets you use your phone to interact with the video you're watching on TV – for example to leave a comment or make a purchase. We're also experimenting with a new feature called Watch With which enables creators to provide live commentary and real time reactions to games and events.

Neal Mohan
CEO at YouTube
(February 2025)

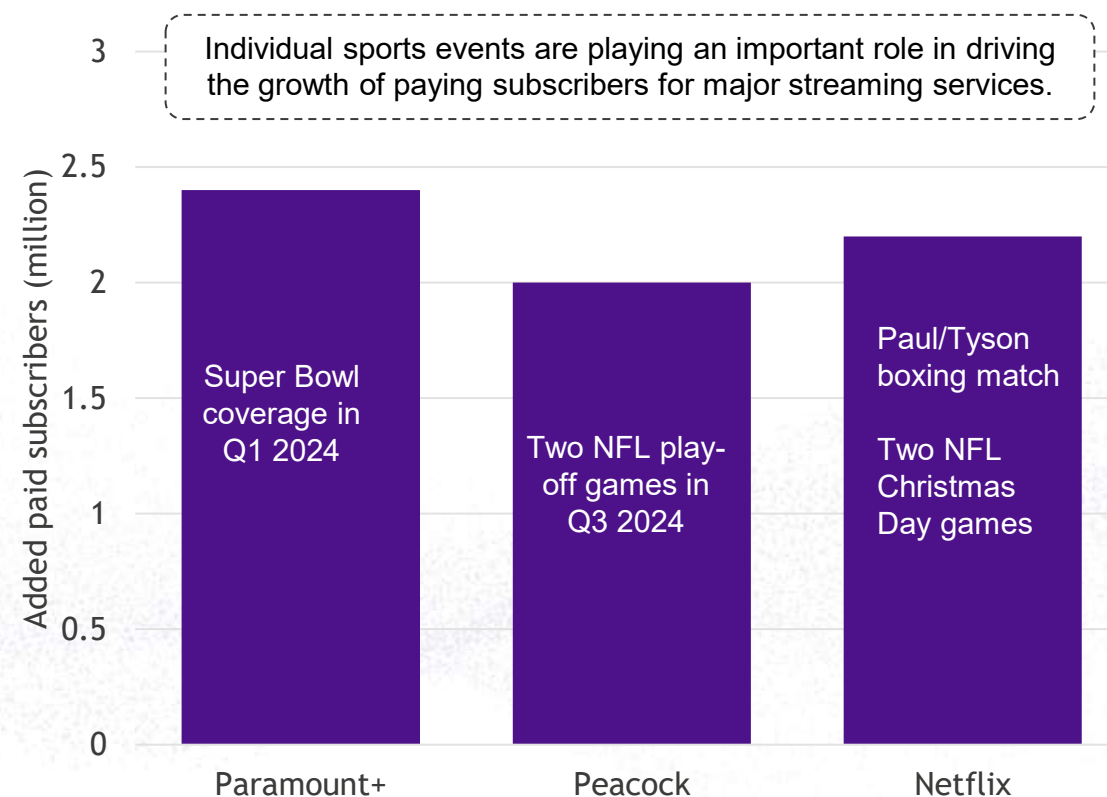
North America – Business Transformation

Streamers continue to invest in live sports to boost profitability and viewer engagement

Streamers' share of total global spend on sports rights



Paid subscriber growth driven by individual sports events - Examples in 2024



North America – MediaTech Investment



Media companies are adopting IP in stages, driven by the need for flexibility and efficiency

Factors accelerating IP adoption in the US

Maturing IP routing technology

SMPTTE ST 2110-based IP routing technology has matured significantly over the past two years with a broader range of less expensive and interoperable IP switches compatible with ST 2110 products. The NMOS specifications have eased the initial setup of ST 2110 systems.

Closing IP knowledge gap

Broadcast engineers' experience and trust for IP are improving due to an increasing number of large ST 2110 projects reaching completion. However, local stations remain cautious about replacing their relatively new HD-SDI infrastructure with ST 2110 due to economic pressures and cost cuts.

Democratization through NDI

The adoption of cloud-based applications is driving the demand for NDI – a low-cost alternative to ST 2110 – especially in newsrooms. Some newsrooms have saved costs by switching to cheaper NDI PTZ cameras instead of robotic pedestal systems using SDI cameras.

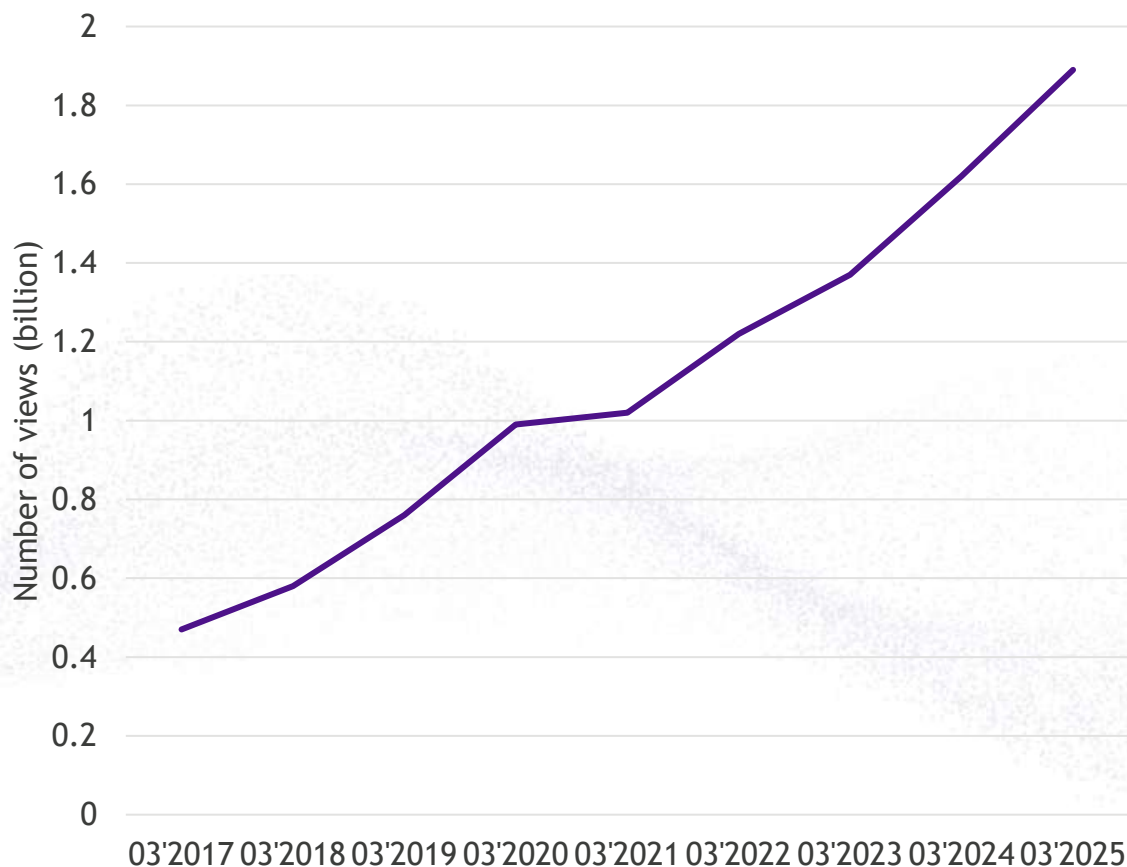
MediaTech Buyer in an IABM interview

*The Montreal facility was the first broadcast facility to go **fully IP** a few years back. We built everything on a new IP backbone, but we used hardware-based production technology. We are now building on that success as we do a greenfield within a brownfield for the Toronto Broadcasting Centre. [...] We really need to create a **centralized hub** that supports all the incoming content from news gathering. Secondly, we need more **user-friendly** production tech, so Toronto Broadcasting Centre redevelopment is leaning very heavily on exploring the possibilities within **software-based production**.*

Marc Lefebvre
Senior Director, Operations
CBC
(October 2024)

Live cloud production is enabling real-time sports analytics, driving engagement and revenue

NHL cumulative total video views on YouTube



MediaTech buyer in AWS re:Invent 2024 - December 2nd 2024

*What's next is that we start looking at all the components of the **live cloud broadcast**, so the **replay** component, because you've now got 12 ISOs sitting in your replay system in the cloud..[..]. You really start to understand that all of these **individual components** have powerful kind of use cases of their own. We're really starting to leverage the ability to **identify content** using **AI** in the future and being able to break everything down into an **agent-based** kind of content model that allows us to not only do a live cloud production, but also supercharge highlights on **multiple platforms**.*

Grant Nodine
SVP of Technology
NHL
(December 2024)

North America – MediaTech Investment **iamt**

Live cloud/hybrid production is enabling media businesses to innovate and cover Tier 3 content

MediaTech buyer at an IABM panel at NAB

*Live sports business is doing very well. We are expanding to smaller and more **cost-effective production techniques**. [...] Pre-COVID nobody wanted to talk about cloud. We have been testing that with a number of our clients to do remote productions and that's the way how we've been working with our clients now. Last year, we did over **4,000 remote cloud events**. [...] It's probably about **\$10 million** in savings, but more important is that it puts the **operator** and that **crew** into their own **homes** and beds, so they are more refreshed and not on the road all the time.*

Mark Chiolis
Director, Business Development
Mobile TV Group
(April 2025)

MediaTech supplier in an IABM interview

*The days of questioning whether or not the cloud is suitable for mainstream production are probably over and it's really about the **execution**. We've got lots of customer case studies about **live cloud production** around how broadcasters are doing **playout**. We have thousands of channels in production and playout, as our partners over the globe have thousands of channels. So, first I'd say the **IP transformation** is here, the **cloud** is here – it's part of the **day-to-day** and it's part of the **expectations** that customers have as they start their own digital transformation.*

Steph Lone
Global Director, Solutions Architecture,
Media & Entertainment, Games and Sports
AWS
(February 2025)

North America – MediaTech Investment

Media businesses focus on efficiency and optimize bandwidth usage, as CDN costs skyrocket

Factors driving CDN prices

Power:

Energy costs have increased due to global factors such as the war in Ukraine as well as inflationary pressures in several regions.

Cross-connects:

Interconnection service (data transfers between data centers) fees have become a major new cost component as media companies need seamless data transmission to cater for global audiences.

Labor:

Talent shortages are translating into salary inflation for required skillsets, which CDN providers are incorporating into customer prices.

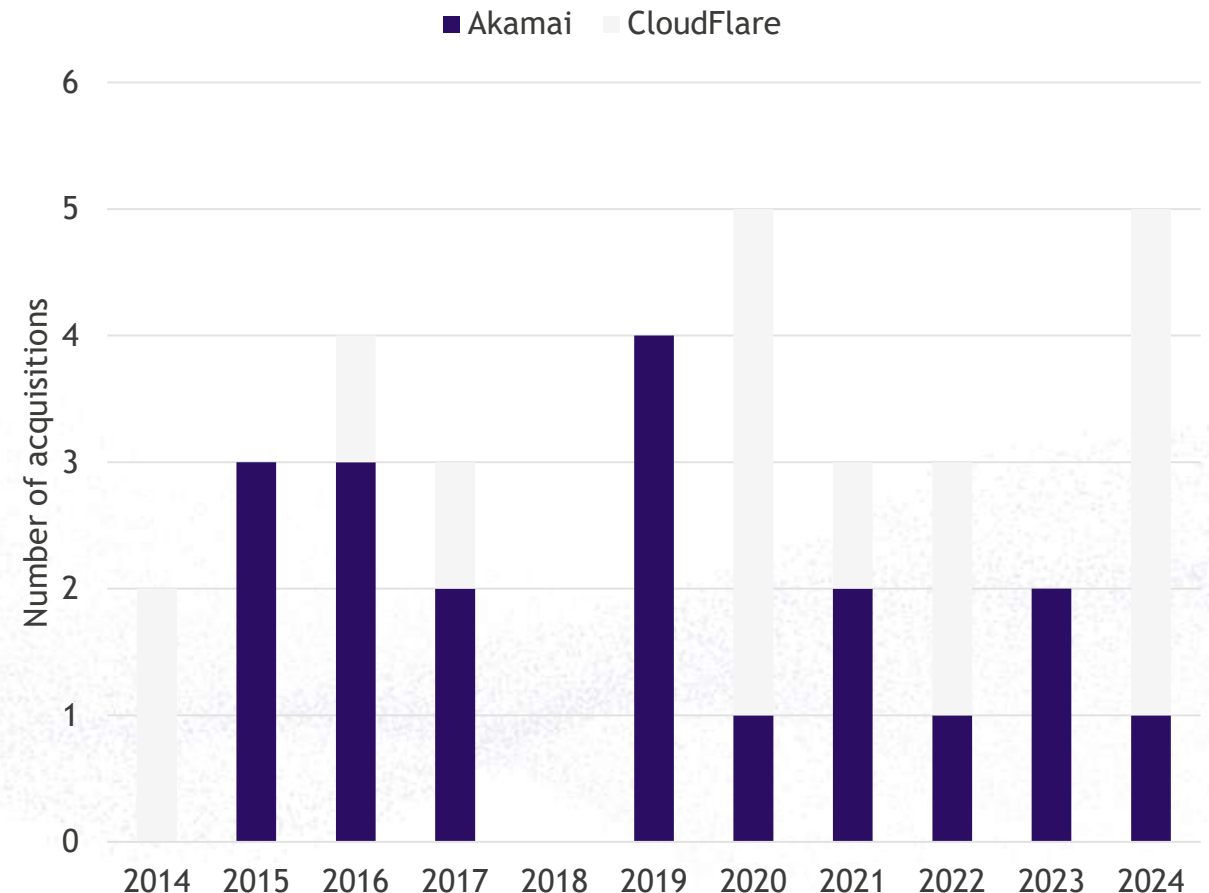
Compute resources and bandwidth:

Despite improving computing power, the massive increase in data volumes is causing price pressure for CDN providers. At the same time, bandwidth-related savings have decreased.

Consolidation:

Over the past decade, major CDN providers have acquired several smaller players in the market, which has reduced price competition.

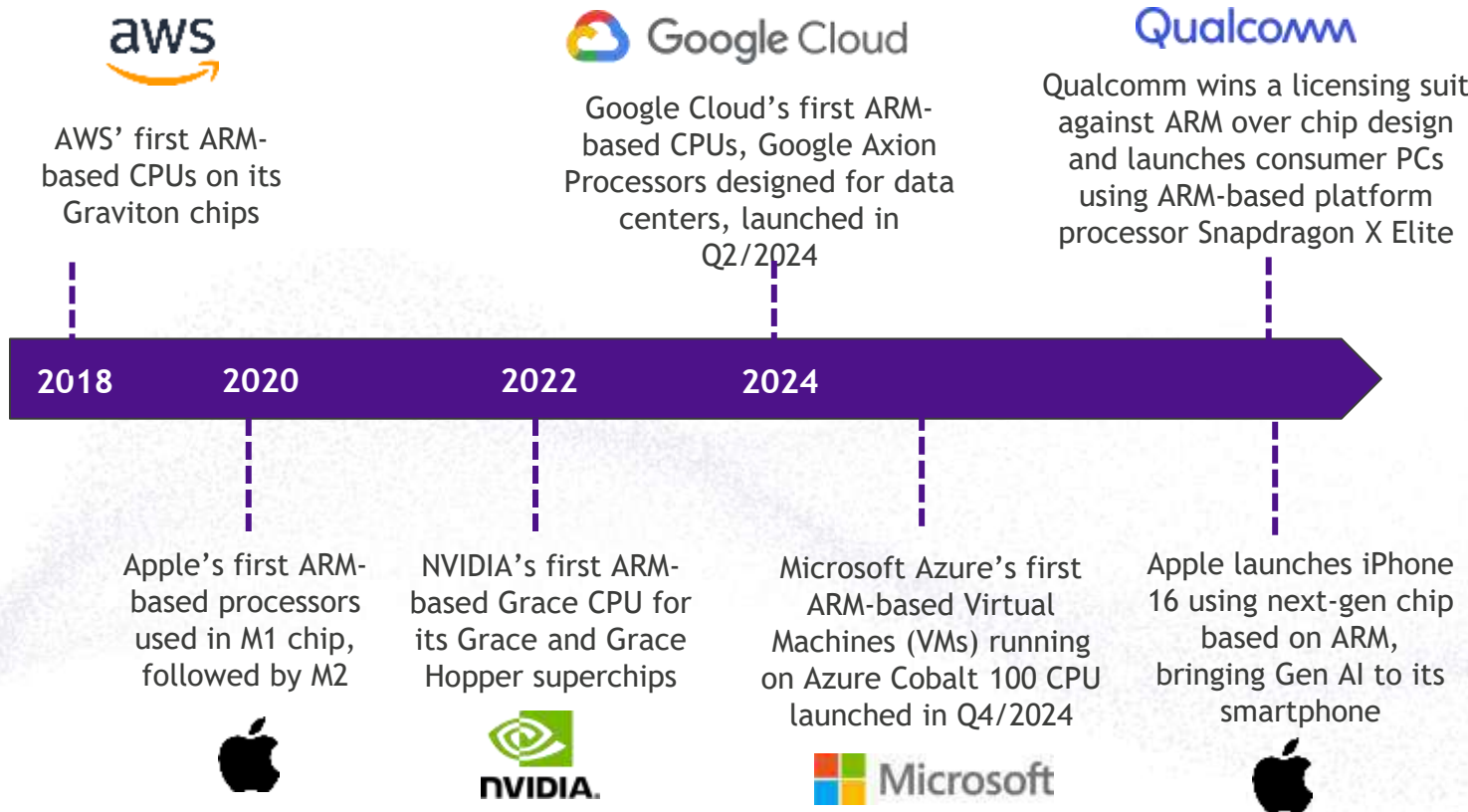
Acquisitions by major CDN providers



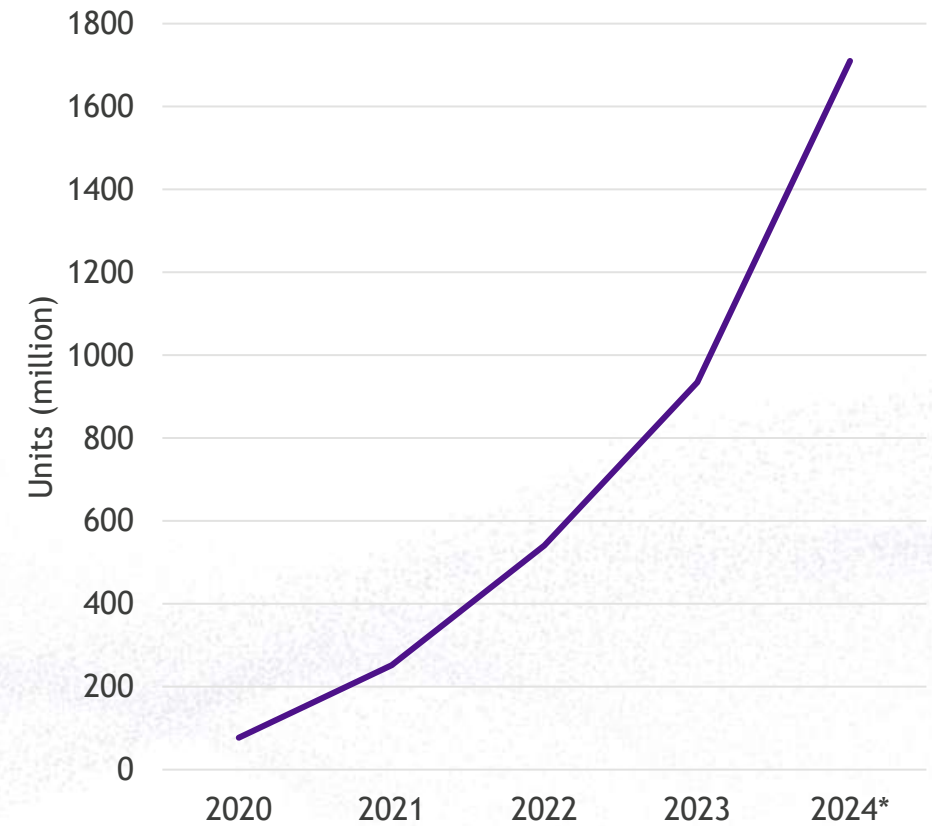
North America – MediaTech Investment

Hyperscalers are investing in ARM-based custom silicon to accommodate demand for Gen AI

ARM-based computing investments by player



ARM server shipments globally

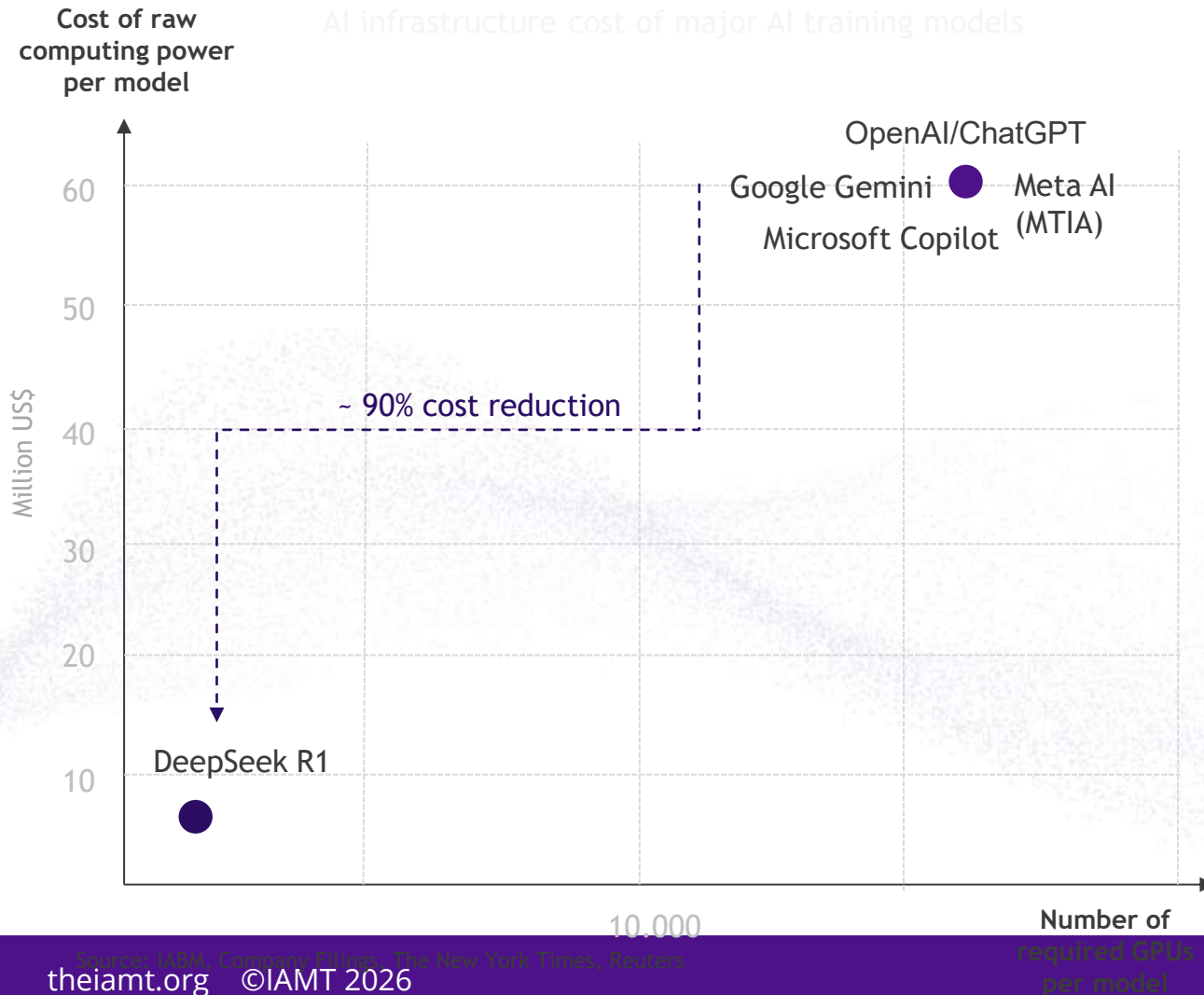


*global shipments for 2024 are an estimated value.

North America – MediaTech Investment



DeepSeek is accelerating the democratization of AI, pushing down the cost of training AI models



OpenAI's letter to the White House - March 13th 2025

*While America maintains a lead on AI today, **DeepSeek** shows that our lead is **not wide** and is **narrowing**.*

Christopher Lehane
Chief Global Affairs Officer
OpenAI
(March 2025)

OpenAI press release - January 21st 2025

*The **Stargate Project** is a new company, which intends to invest **\$500bn** over the next four years building new **AI infrastructure** for OpenAI in the US. We will begin deploying **\$100bn** **immediately**.*

Stargate Project – JV of SoftBank, Oracle, OpenAI and MGX
(January 2025)

Gen AI is increasingly being adopted to write reports and to improve search and discovery

Disney announced the Office of Technology Enablement (Nov 1st 2024)

*Our ability to remain at the forefront of technological advances will only be more critical as we move forward – making it more important to understand and embrace new technological shifts in ways that enable our people, creativity and business. The pace and scope of advances in **AI** and **XR** are profound and will continue to impact **consumer experiences**, creative endeavors and our business for years to come, making it critical that Disney explores the exciting **opportunities** and navigates the **potential risks**.*

Alan Bergman
Co-Chairman, Disney Entertainment
North America
(November 2024)

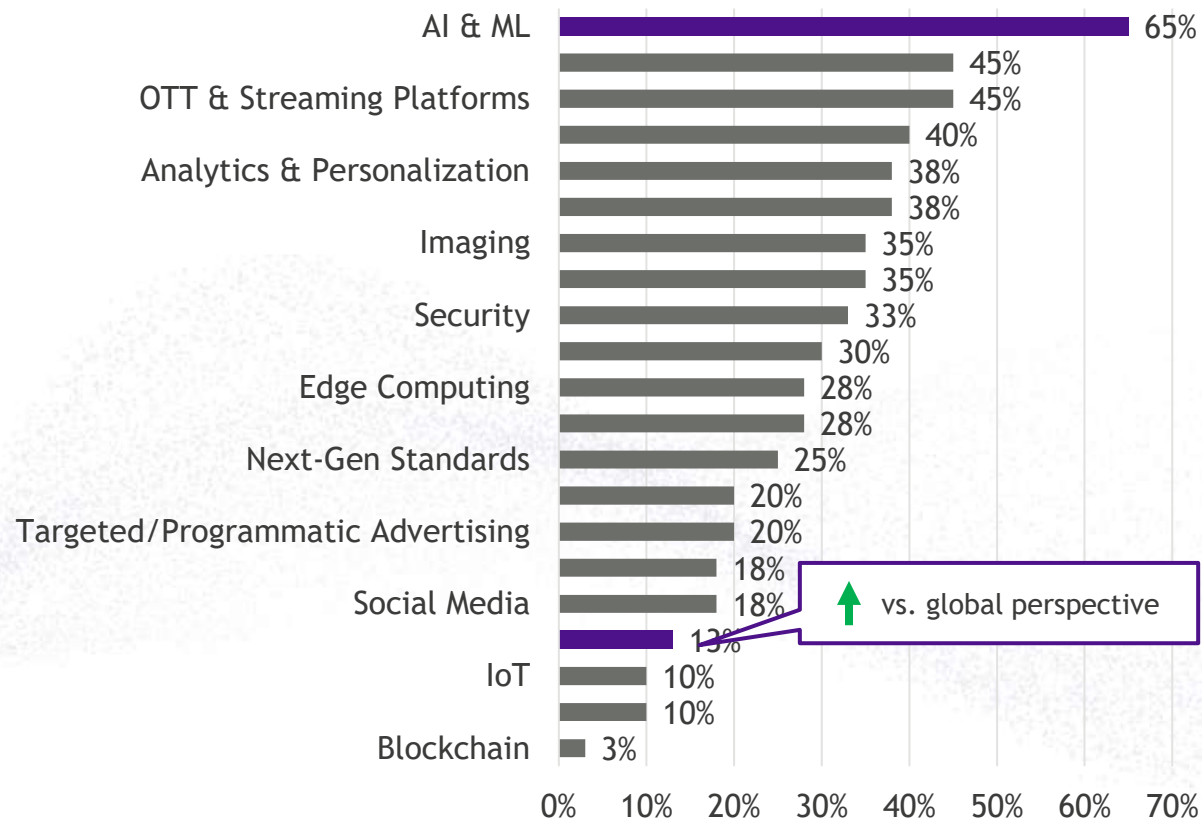
MediaTech supplier in an IABM interview

*In the silicon layer, we have customers that want to do everything from training their **own models on silicon**, use our and their own inference and training products to be able to train their own custom models. A lot of customers just want to be able to **finetune** or **tweak models**. At the application layer, what we're seeing is businesses really want to accelerate things like **report making** and **pulling data** across a wide array of data silos, because some companies have a great data mess. Their **code transformation** is another big area that we see a lot of these generative AI products being utilized by our customers in the market.*

Public Cloud Service Provider
North America
(February 2025)

Social media is ahead of media companies in monetizing the creator economy and SME brands

Trends in Technology Roadmap



Q. What are the most important trends in your organization's technology roadmap?
(All industry, North America, 2025, n=40)

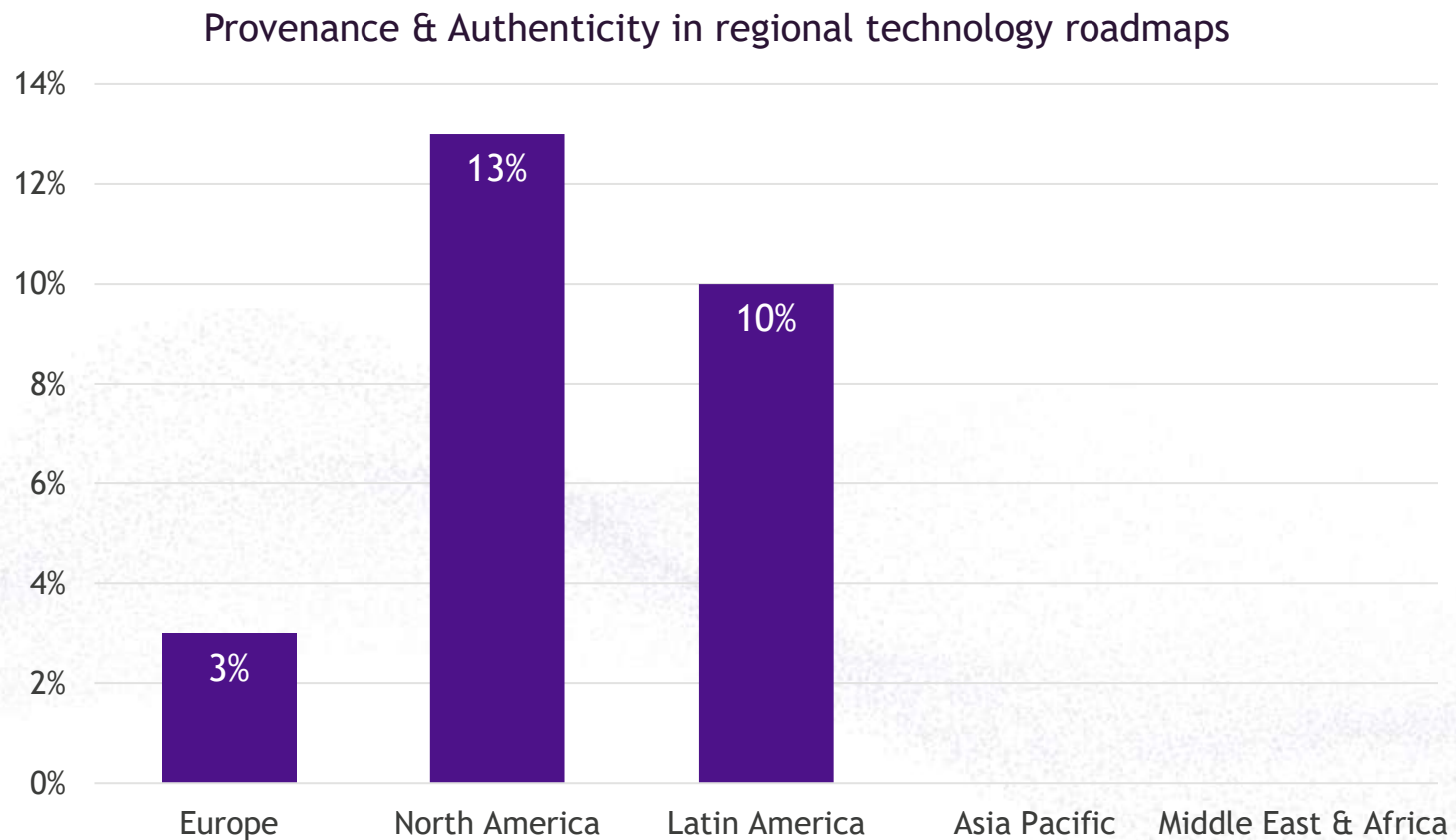
Alphabet Q4 2024 Earnings call - Feb 4th 2025

*We saw robust revenue growth backed by continued growth in watch time across ad-supported and Premium experiences. Our focus here remains on building a streaming platform that enables **creators** to thrive and **unlock the full potential of AI**. Expanding our state-of-the-art video generation model, we announced **Veo 2**, which creates incredibly high-quality video in a wide range of subjects and styles.[...] We'll make it available to creators on **YouTube** in the coming months.*

Philipp Schindler
SVP and CBO at Google
North America
(February 2025)

North America – MediaTech Investment

Investment in provenance has emerged in the Americas with the rise of Generative AI



Q. What are the most important trends in your organization's technology roadmap? (All industry, February-March 2025)

Provenance & Authenticity

The widespread adoption of Generative AI tools in North and Latin America is driving demand for robust provenance systems. These systems track and verify the origins and history of digital assets, with a particular focus on news content.

North America – MediaTech Investment **iamt**

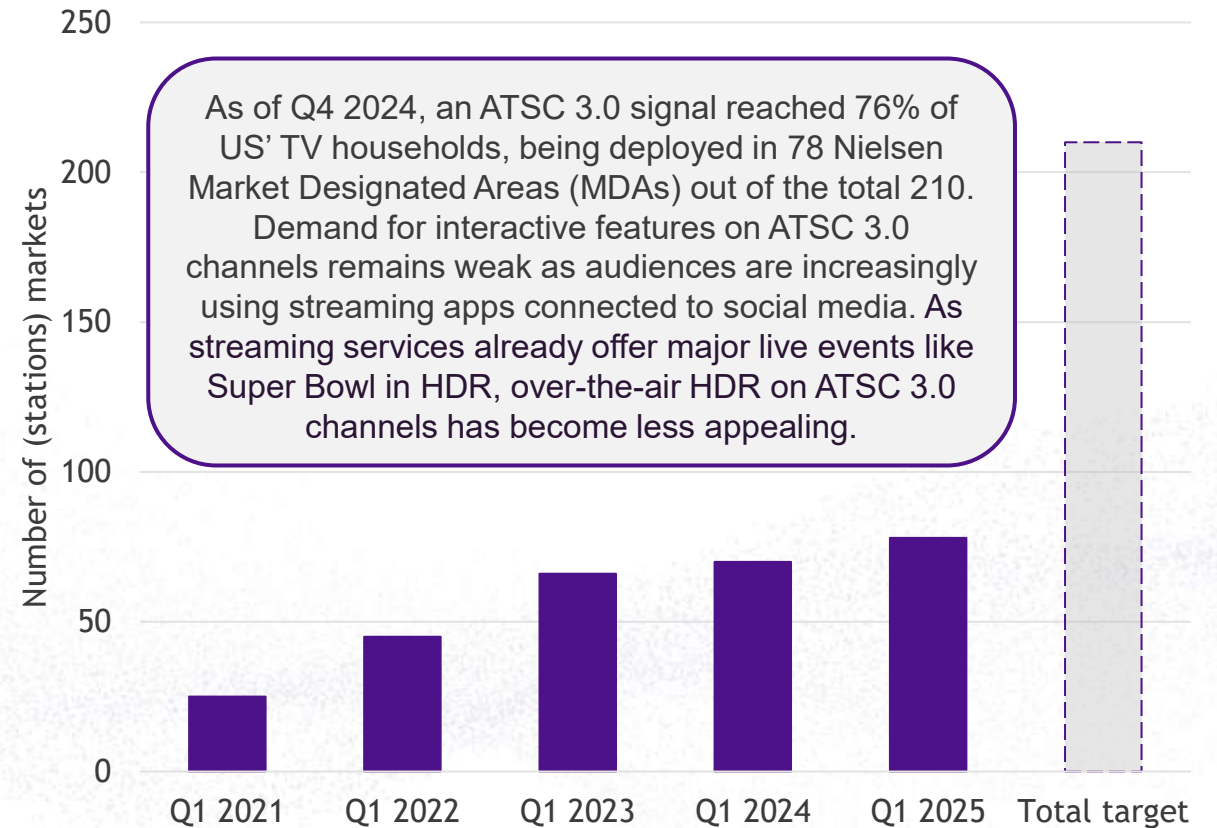
The acceptance of ATSC 3.0 remains slow due to weak demand and competition from streamers

MediaTech supplier in an IABM interview

*The reality is that the demographic who's not watching broadcast television today has already shifted to mobile and it's only a matter of time before the [US] **government** and the **regulatory** agencies realize that the best way to reach the audience is **mobile** [using **Broadcast 5G for emergency alerts**]. [...] You could say that **ATSC 3.0** has coverage of the major markets and they may be serving 80% of the population, but it doesn't matter if **90%** of the population is **not watching**.*

MediaTech supplier
North America
(February 2025)

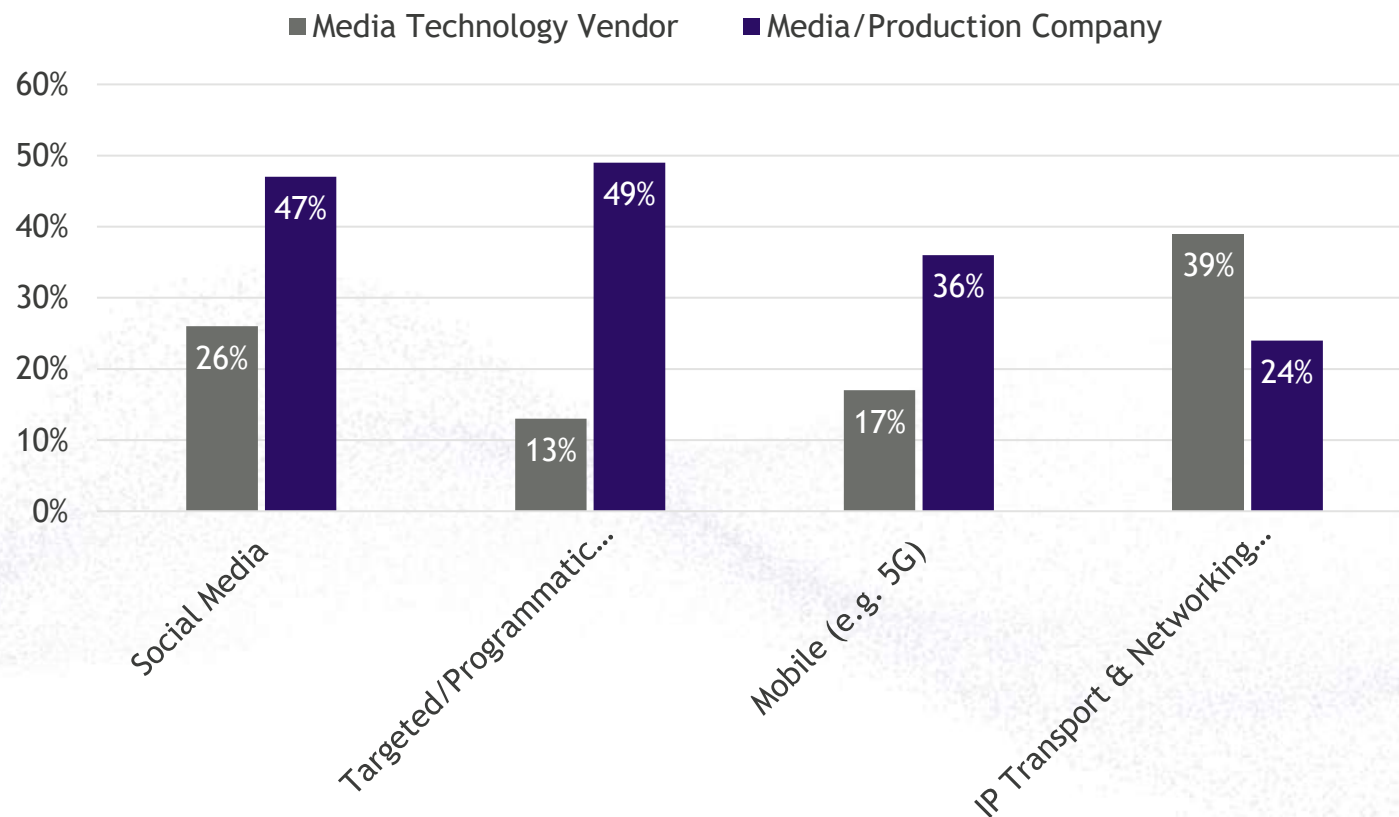
ATSC 3.0 markets "on-the-air"



North America – Business models

North American media companies are focusing on monetizing content via social media and mobile

Trends in Technology Roadmap: North America



LiveNow Fox news streaming service reported 373% growth in YouTube views in Q1 2025

*There are many options for mainstream scripted packaged news. Fox takes a different path. It is **locally** powered coverage that is **unscripted** and **intentionally raw**. It's no surprise that this unique **live event**-driven approach works best on **Youtube's** fast-growing platform.*

Jeff Zelmer
 EVP of Digital Operations
 Fox Television Stations
 (April 2025)

Q. What are the most important trends in your organization's technology roadmap? (2024-2025, MediaTech Vendors, n=54; Media/Production Companies, n=45)

North America – Business Models (SaaS) **iamt**

SaaS models are maturing, as vendors are offering more accessible and managed products

Key developments in MediaTech sales

Term licenses

MediaTech vendors' go-to-market strategies for SaaS products are maturing as they refine more accessible presentation for customers. Vendors are increasingly offering fixed term licenses (e.g. 36 months) to customers and allowing them to present all costs of the investment as CapEx, including support and upgrades, even though for vendors it is delivered as a SaaS product. Fixed term licenses also allow vendors' sales teams to have a more concrete commission and incentive structure when selling SaaS products.

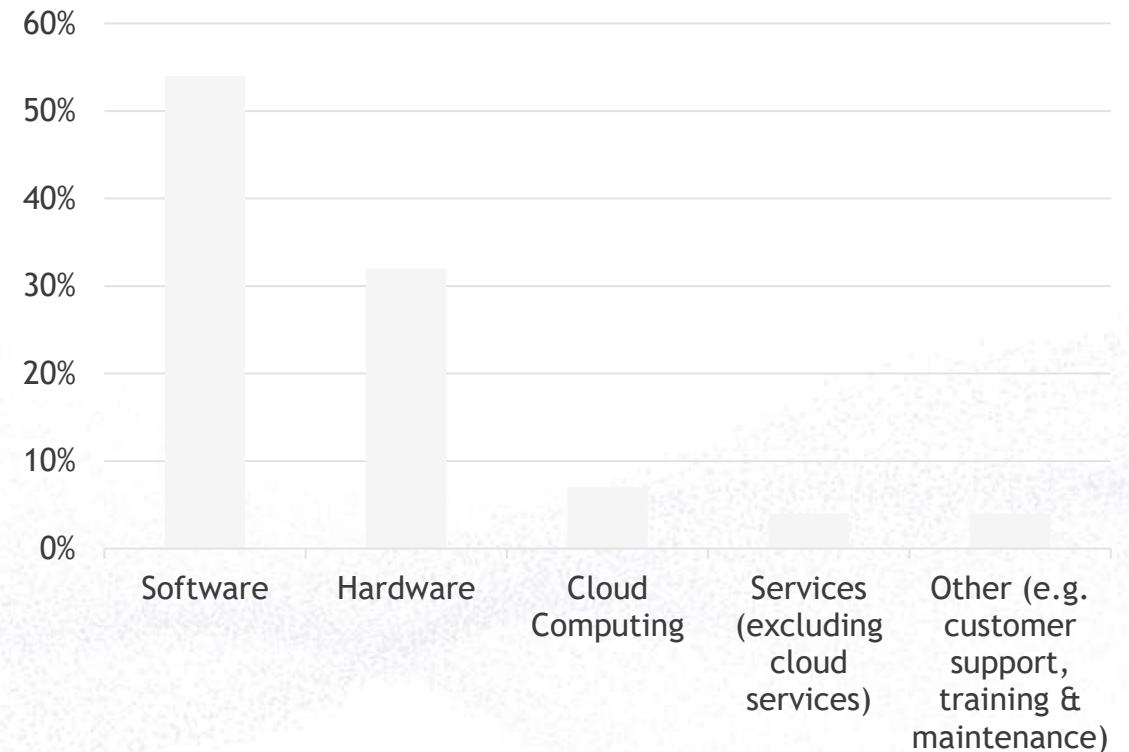
Managed services

There is a major shift towards managed services, partially driven by the limited availability of experienced broadcast engineers in broadcast organizations, making even more conservative companies consider moving to a managed service, typically offering a mix of warranty, support, operational services.

"Self-service" SaaS

The move to SaaS is reducing the need for support on the vendor side, because every SaaS customer is getting the same standard, fixed offering, compared to a more traditional product being more bespoke in terms of features and support requirements. Vendors are increasingly offering a "self-service" SaaS tier of tools that are accessible online, collaborative, and easy to use.

Supply-side primary revenue sources in North America



Q. What are the most important trends in your organization's technology roadmap? (media technology vendors, February-March 2025)

North America – Business Models (SaaS) **iamt**

Financial pressure is dictating media businesses' investment mix, gradually moving to OpEx

MediaTech supplier in an IABM interview

*A lot of customers are still very **CapEx-centric**, whereas vendors would love to be OpEx, because the valuation of their company goes up if they have SaaS as income. So, they're selling **term licenses**. [...] Being way more **flexible** in selling into the market – we're starting to see customers react better to that. Even very conservative customers are starting to move to **cloud** and **IP** and make all those [OpEx] investments. The reason is because the **financial** pressure doesn't allow them to continue operating the way they are. As a vendor, you have to find a way to appeal to the **finance guy** in your customer's organization because he's ultimately the one who's applying the pressure.*

Brick Eksten
CEO
Qligent
(February 2025)

MediaTech supplier in an IABM interview

*There's a drive to needing **fixed term contracts** or something similar in the software as well as hardware [investment], because there is a **nervousness** about it. There's a number of media companies which sweat their assets for 5,10, 20 years, so the idea of moving to SaaS is daunting.[...] A common piece we hear is around the customer's **finance** kind of operations or their company valuations and things based on CapEx rather than OpEx and needing to drive more **CapEx** spend. Quite a lot of organizations have or are moving their financial modelling over because they just need to.*

MediaTech supplier
North America
(February 2025)

North America – Business Models



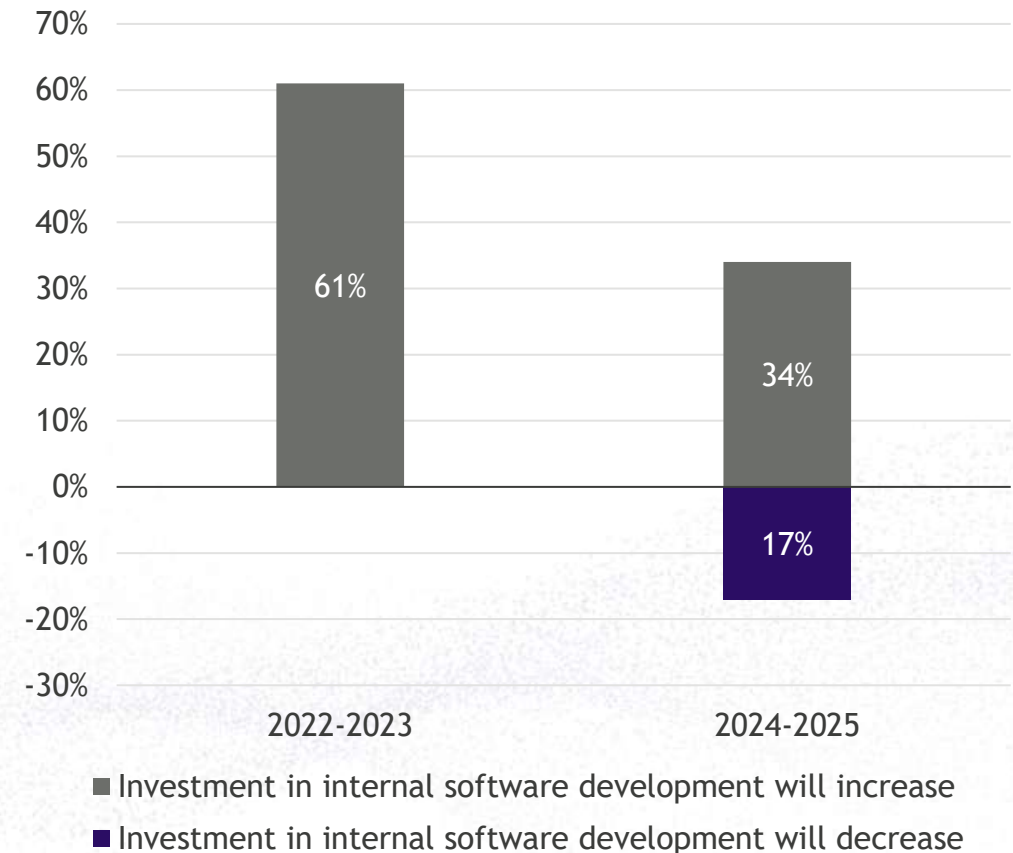
Managed services boom as media businesses try to address talent shortages and complexity

MediaTech supplier in an IABM interview

*A trend we've been seeing in especially **sports broadcast** is that these broadcasters, their engineers and their creators have these **tool chains**. The media goes into the front of the tool chain and they're beginning to rely more and more on **managed service** providers to handle the tool chain for them. That requires **collaboration** across vendors and their tools, the people and the products. We're also seeing more **managed service providers** who are taking the responsibility of handling the increased **complexity** to get from end to end for their customers. That gives them a **single point of contact** to be able to manage that.*

MediaTech supplier
North America
(October 2024)

Shift toward outsourcing in North America

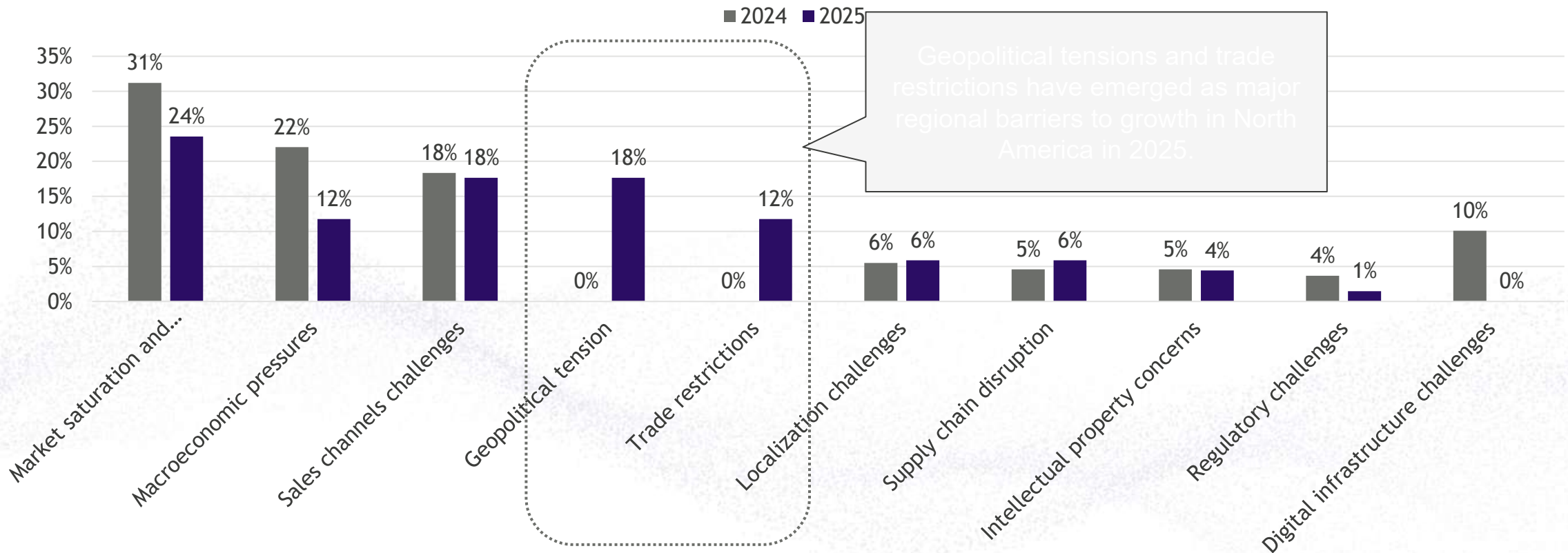


North America – Regional Challenges



Geopolitical tensions and trade limits are hindering North American growth

Regional barriers to growth in North America



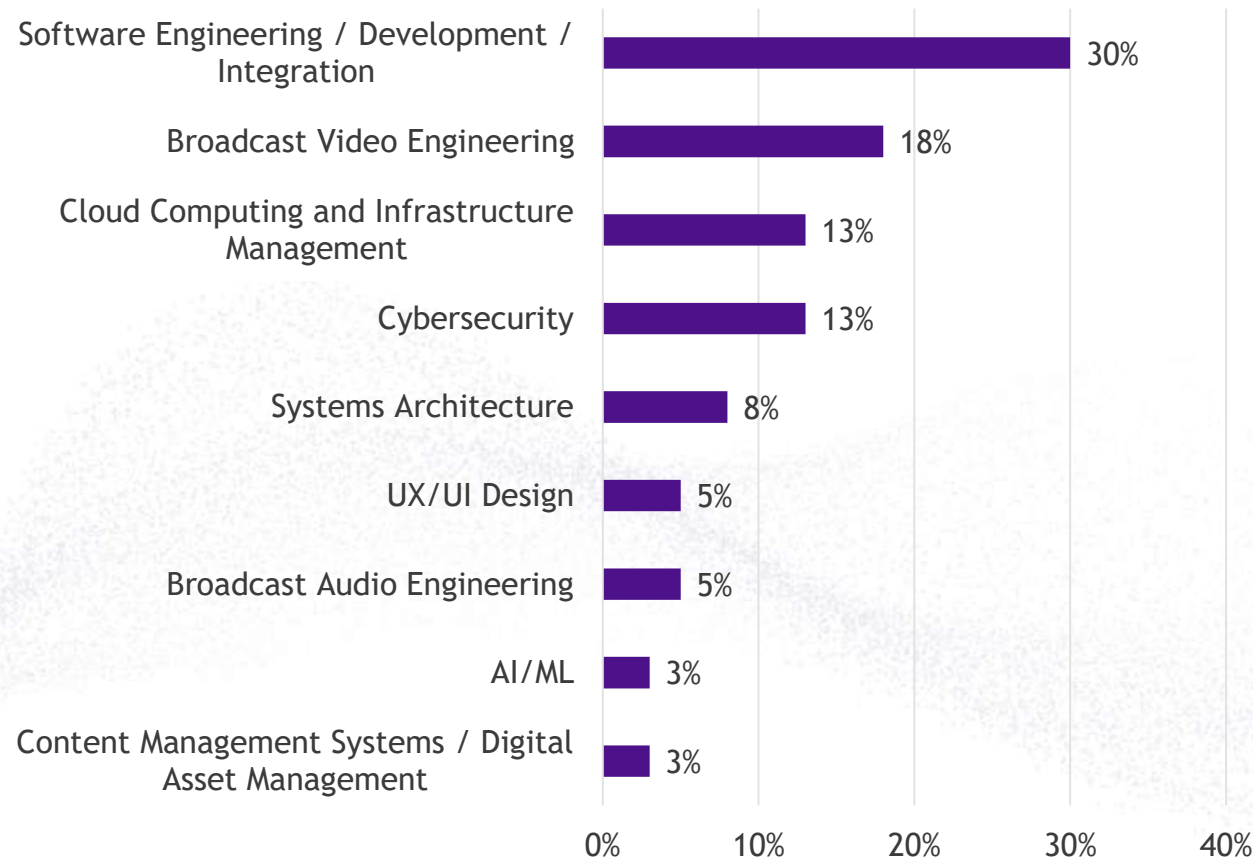
Q. What is the major regional barrier to the growth of your business in each of the regions where your company operates? (All industry, 2024 n=109, 2025 n=68)

North America – Regional challenges



Talent shortages remain a major challenge, but managed services may bridge the gap

Most challenging technical skills to recruit



MediaTech supplier in an IABM panel at NAB

*Our latest addition is **managed services**. We are not just responsible for executing projects, but we have real skin in the game. When we launched these services, our customers actually expected us to grow their audiences and to help them manage churn. So, while they are paying for our services, there is also an **upside** or **downside incentives** associated with us helping them to grow their underlying PNL [profit and loss].*

Mrugesh Desai
Vice President
Accedo.tv
(April 2025)

Q. What technical skills or expertise do you find the most challenging and the easiest to recruit for?

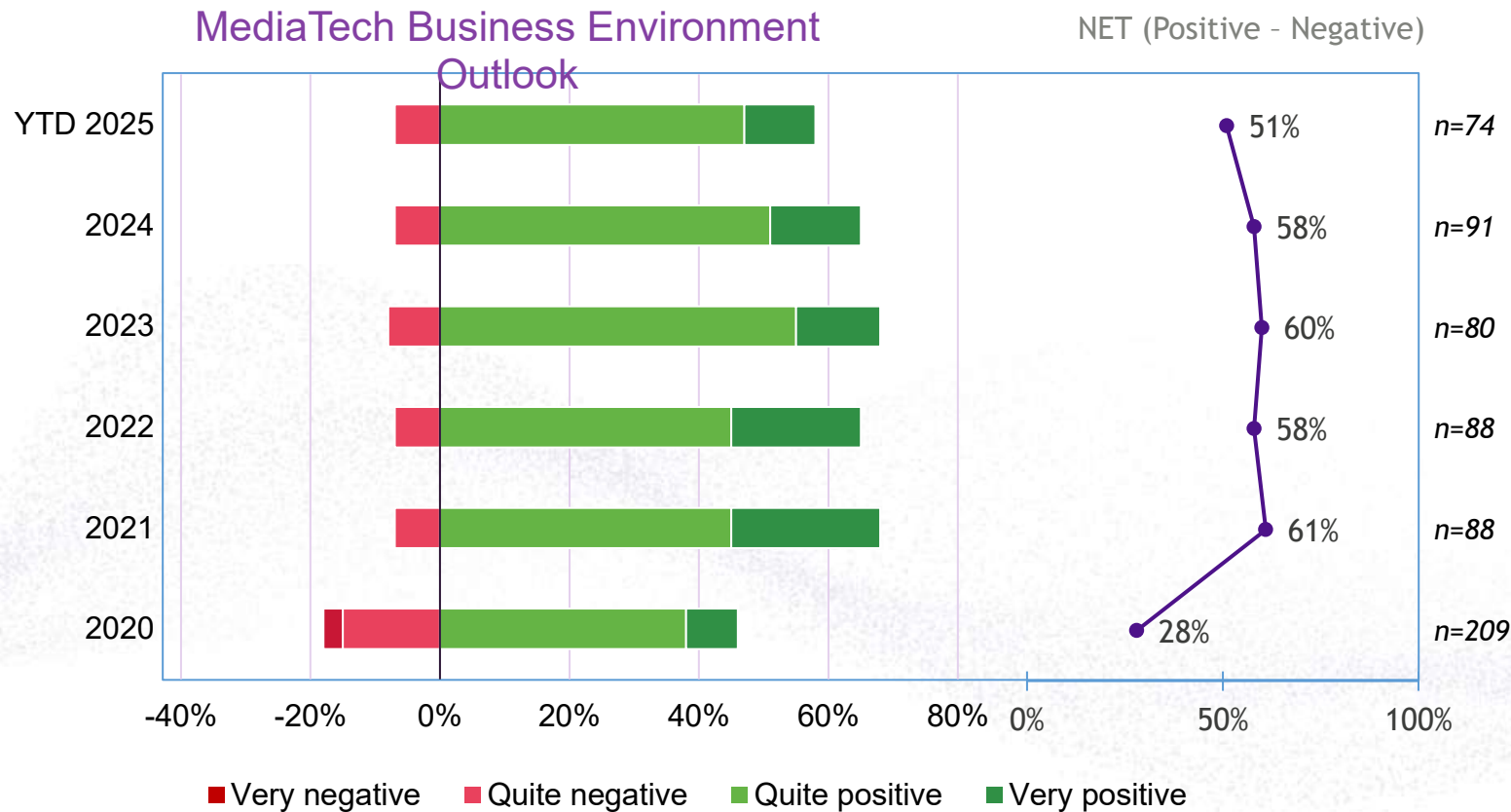
(2024, all industry, n=40)



GeoAnalysis — Europe

Connect. Support. Inform.
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The European business environment outlook is limited by increasing uncertainty



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

Business Confidence

In Europe, the business environment outlook deteriorated slightly in 2025 owing to signs of increased market uncertainty - while the positive outlook declined by 7% points, the neutral outlook increased by 6% points from 29% to 35%.

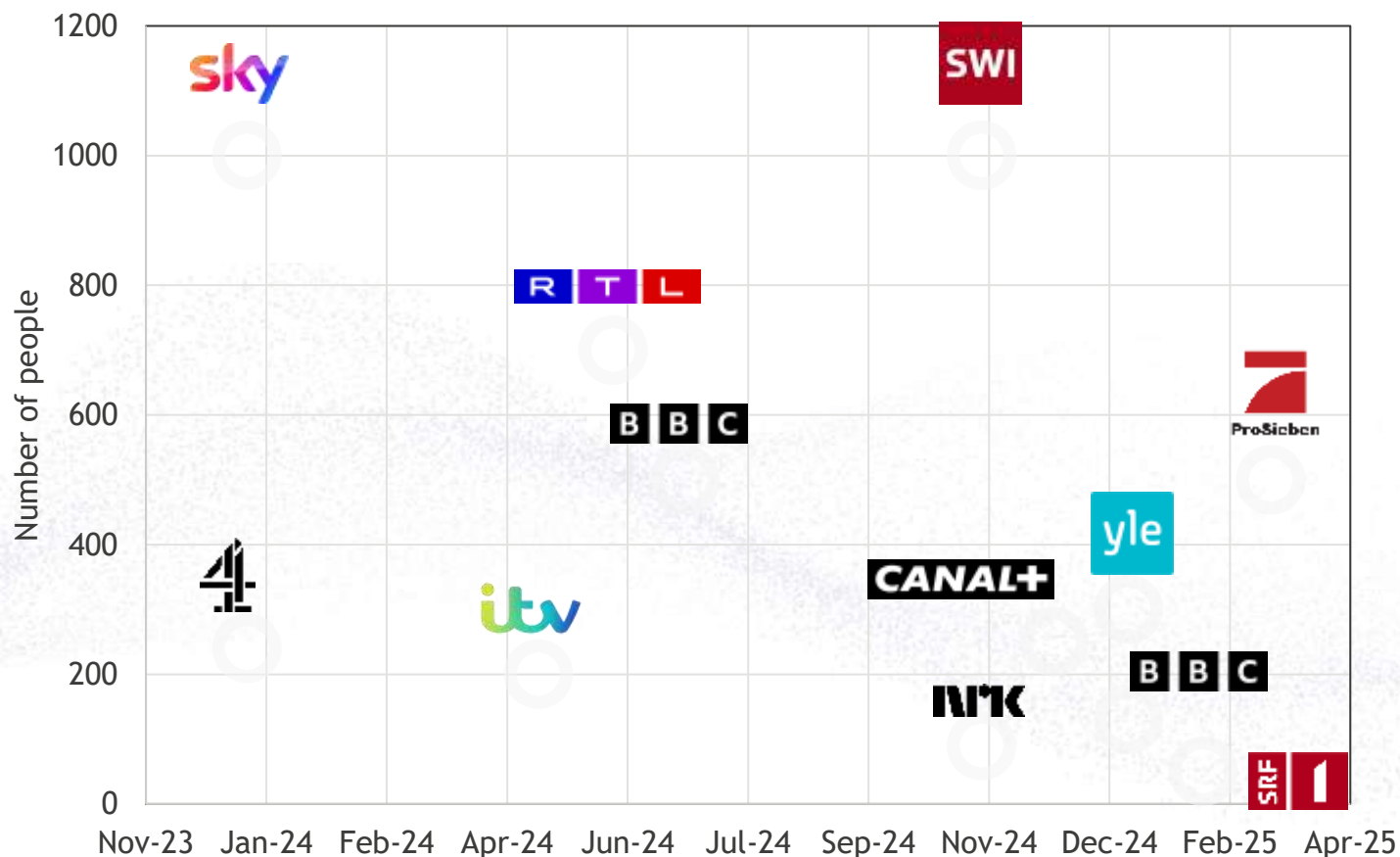
The economic uncertainty has led to cost-cutting measures and layoffs, while interest rate cuts are creating a more favorable investment climate.

Europe – Market Environment

Media companies continue to cut costs to drive efficiency and profitability



Layoffs by major European media companies



ProSieben Sat.1 - Press release on March 6th 2025

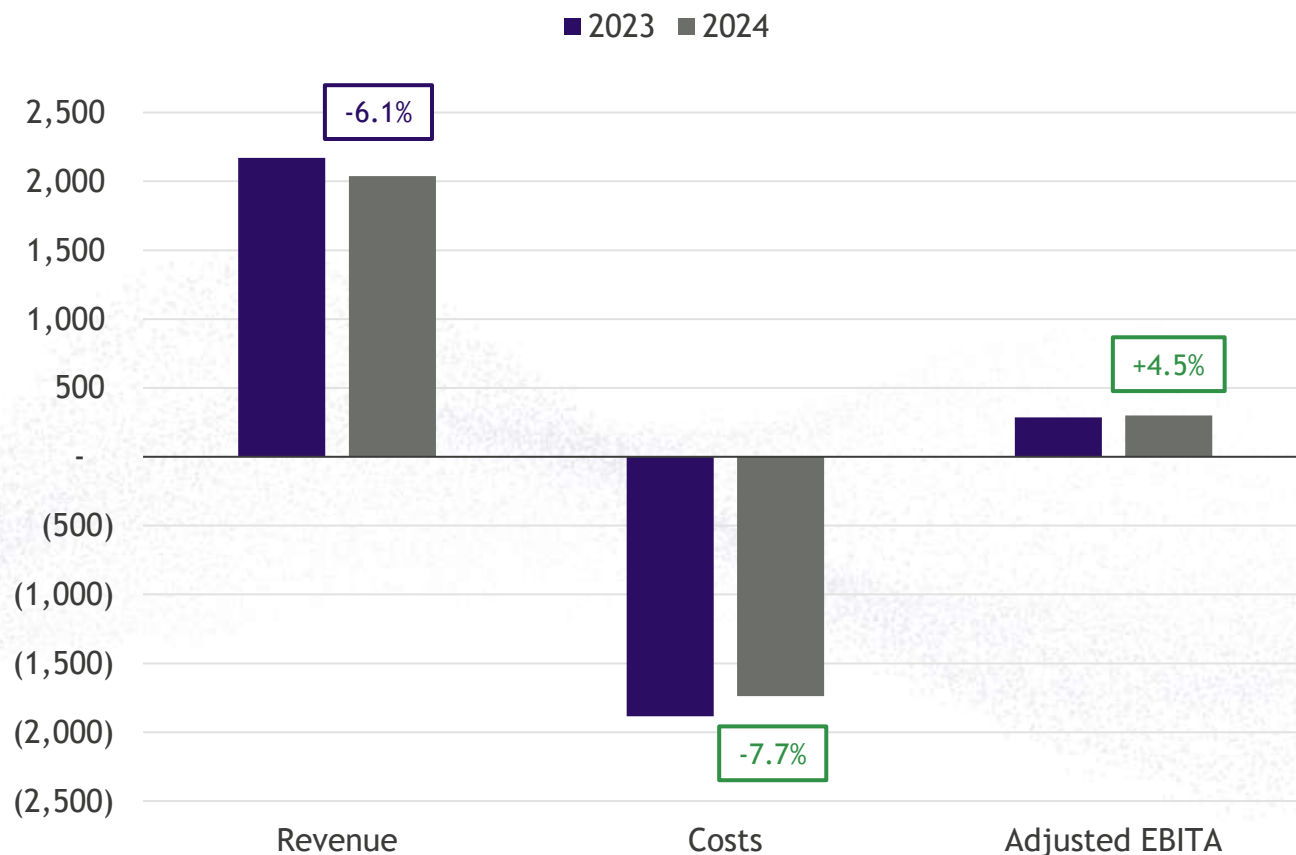
*The **German economy** and in particular, **private consumption**, which is relevant for the advertising business did not develop as positively as the institutes had forecast. In Q4, which is important for the TV advertising business, revenues were significantly lower than in the previous year. While revenues from the **linear TV** advertising business **declined** in 2024, the **streaming** platform **Joyn** again grew dynamically and achieved a **36%** increase in **AVoD** revenues. This development underlines the success of the programming focus on **local** and **live** content across all platforms.*

ProSieben Sat.1
Europe
(March 2025)

Europe – Business Transformation

Broadcasters' shift to digital-first business is gradually paying off, accelerated by cost cuts

ITV Studios financial performance



ITV Full Year Results 2024 - Press release on March 6th 2025

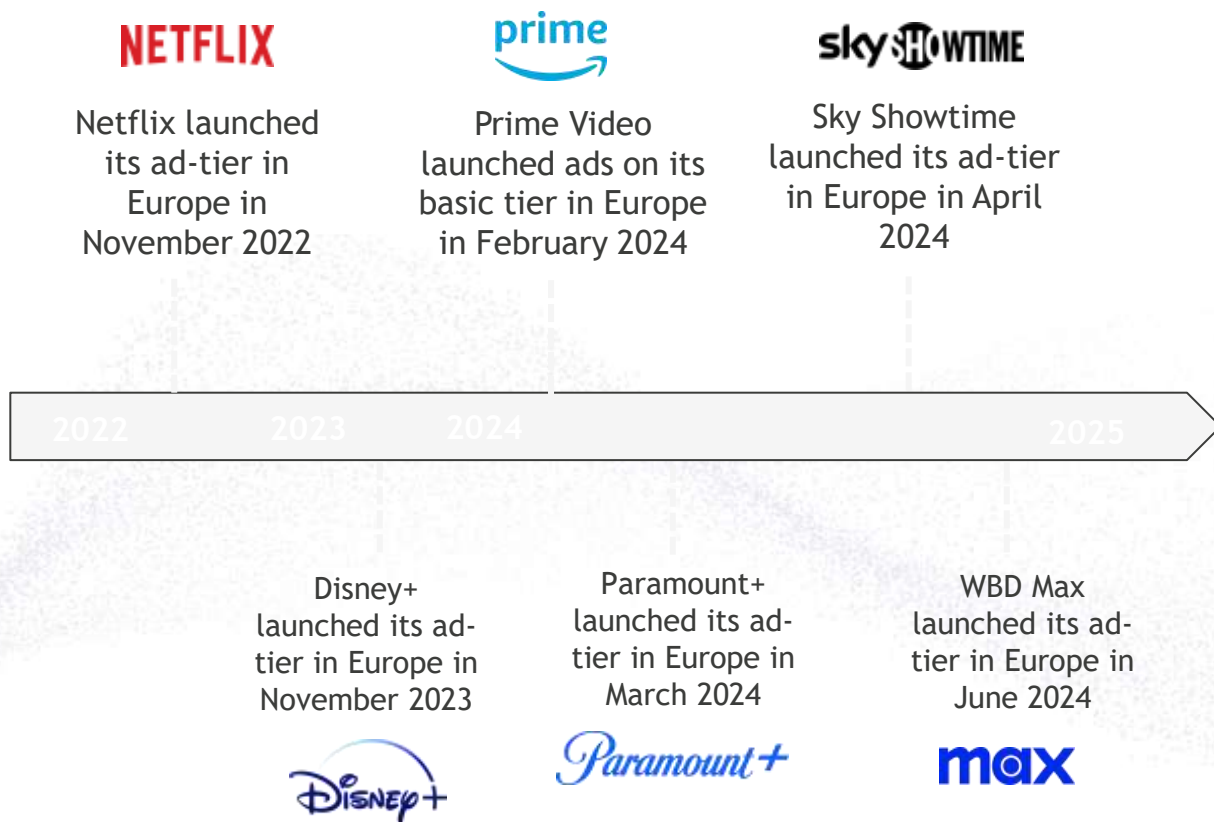
*ITV Studios has delivered **record profits** this year, despite the impact of the writers and actors strike and a softer demand from free-to-air broadcasters, which reflects strength, scale, diversification and creativity of ITV Studios production companies around the world. **ITVX** has been the UK's fastest growing **streaming** platform over the last two years. [...] Our **efficiency** program has delivered savings which have funded growth investments, offset inflation and improved our margins.*

Carolyn McCall
CEO at ITV
Europe
(March 2025)

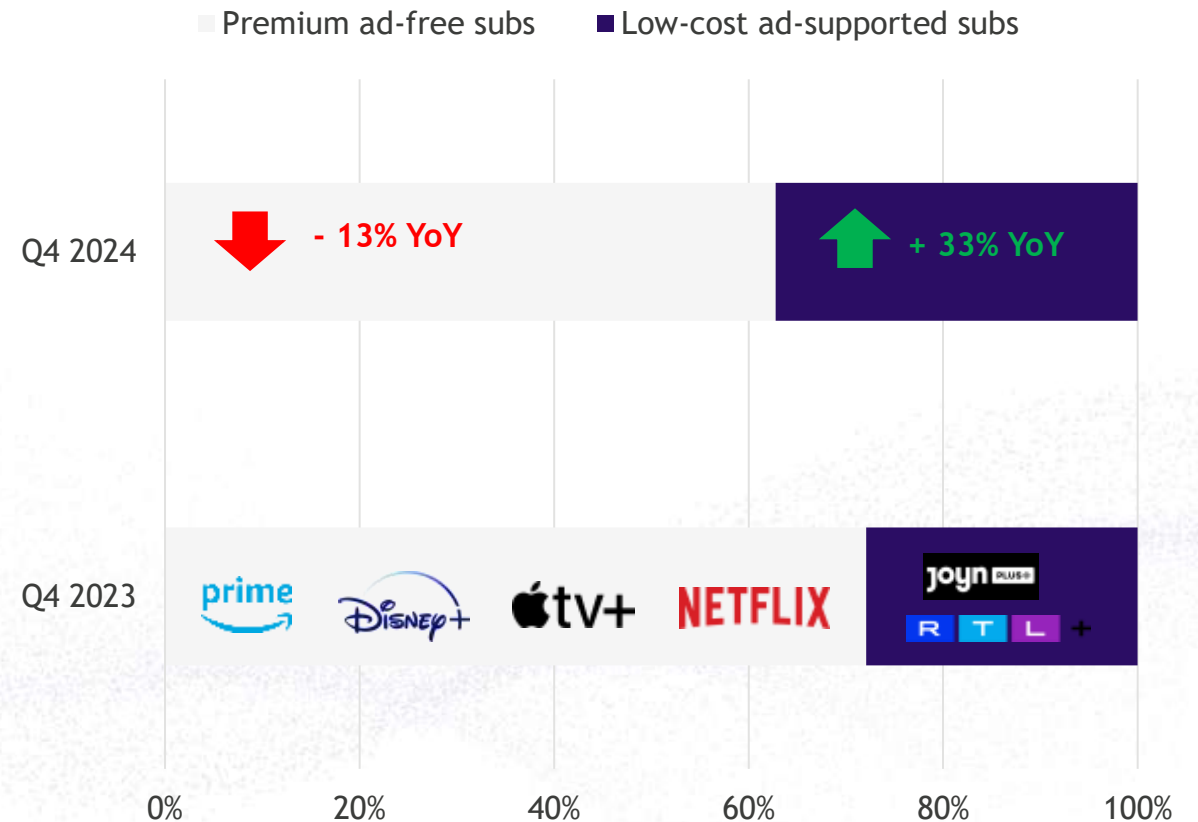
Europe – Business Transformation

Media businesses continue to launch ad-supported tiers to improve reach and profitability

Major streamers' ad-supported tier launches in Europe



VOD subscriptions by type - Germany



Europe – Business Transformation



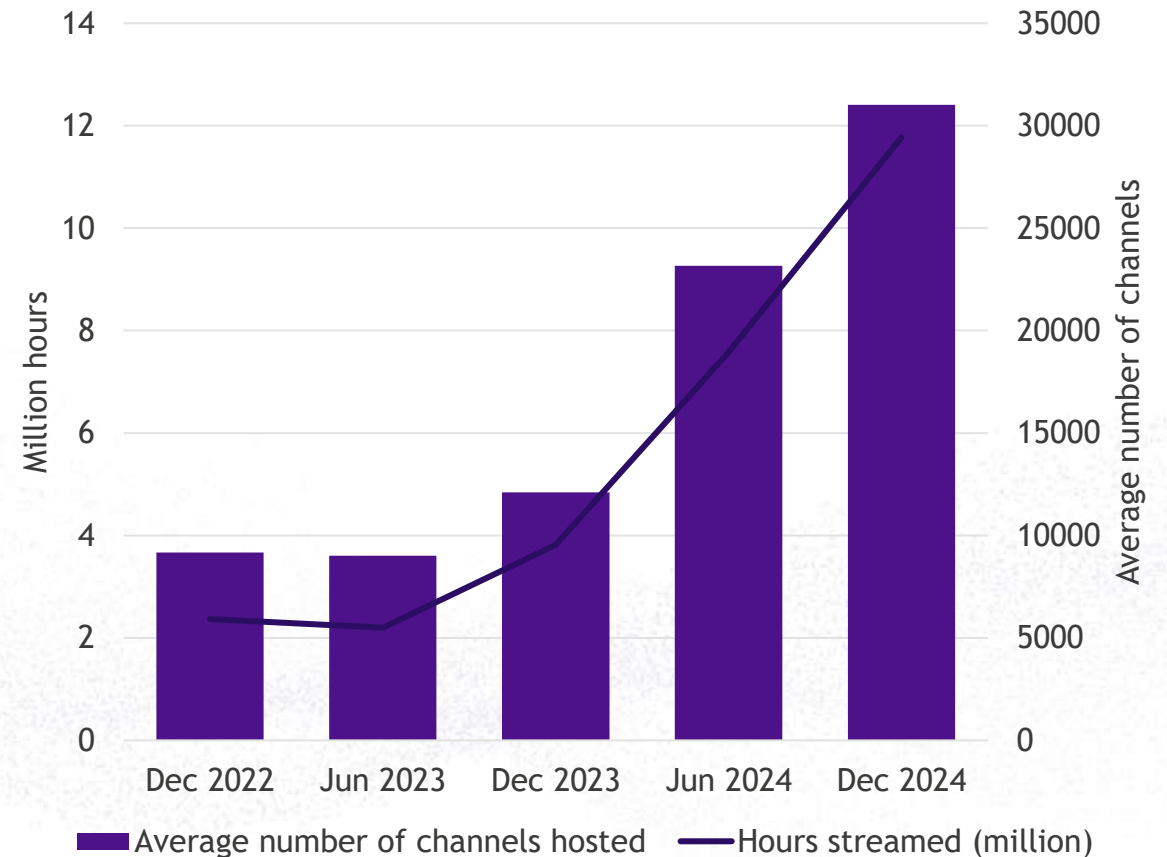
Social media enables broadcasters to target younger audiences and smaller advertisers

YouTube & UK Broadcasters panel at MIP London 2025 - Feb 24th 2025

*We do multiple things on **YouTube**: we have marketing and audience building, then we are publishing now the vast **majority** of our **longer film** content on there, viewing it through a **distribution lens**'. That is seeing a **huge growth** [of 80% in revenue] year on year. In January, we had 9,000 years of watch time on only one channel.*

Matt Risley
Managing Director at 4Studio of Channel 4
Europe
(February 2025)

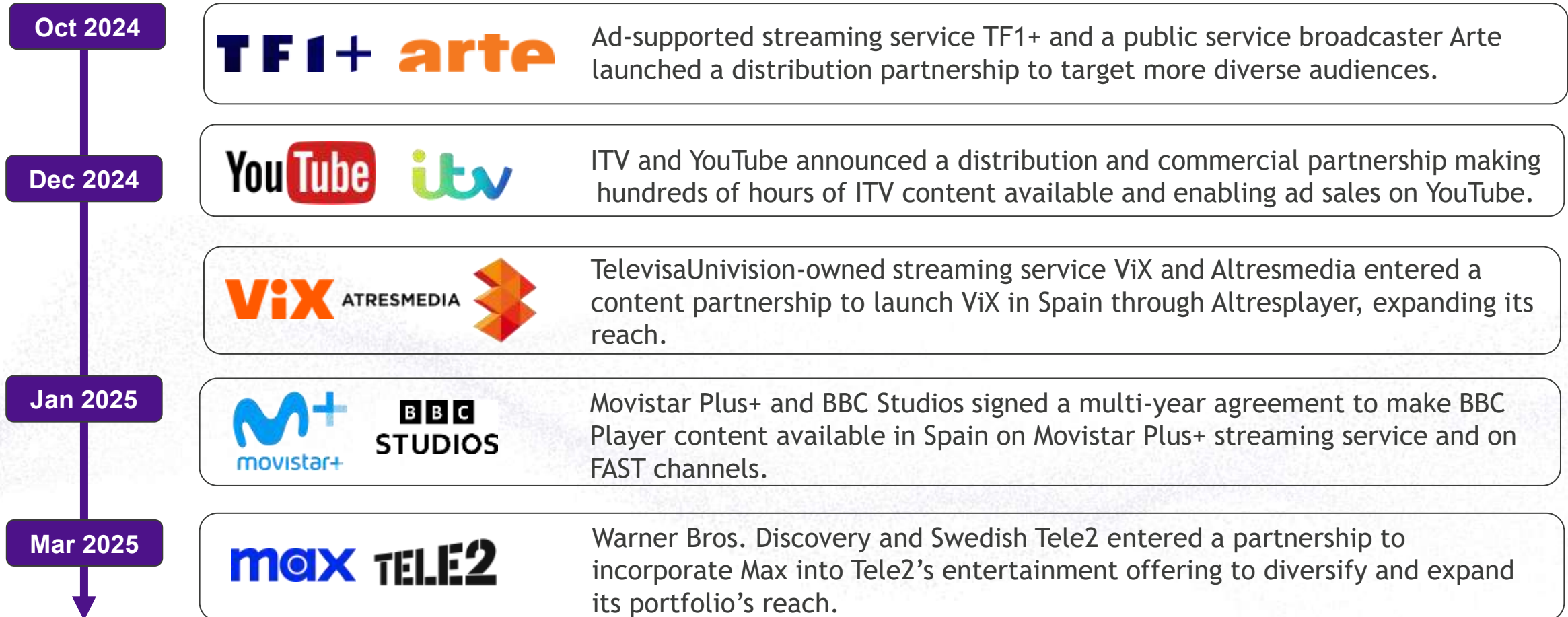
Average number of active hosted YouTube channels



Europe – Business Transformation



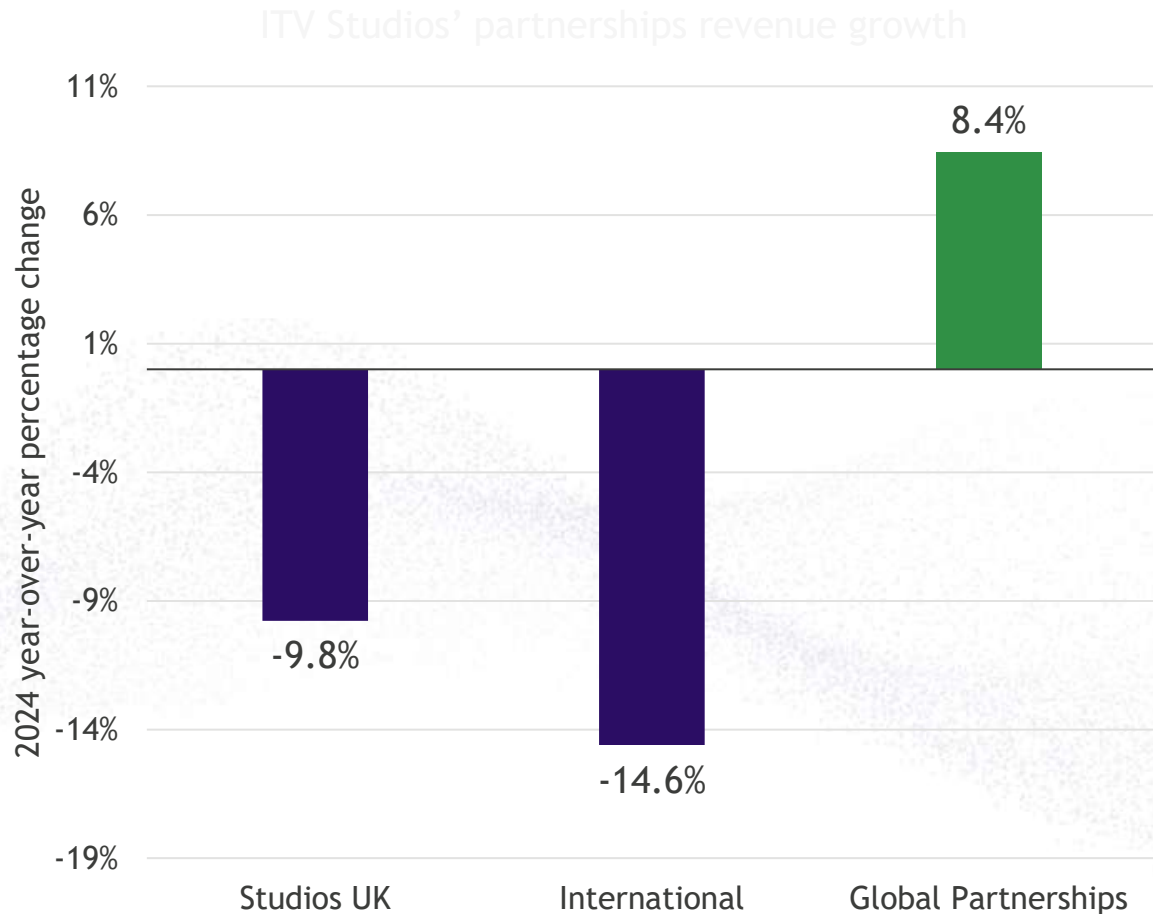
European broadcasters are teaming up with streaming players to expand their digital reach



Europe – Business Transformation



European broadcasters are teaming up with streaming players to expand their digital reach



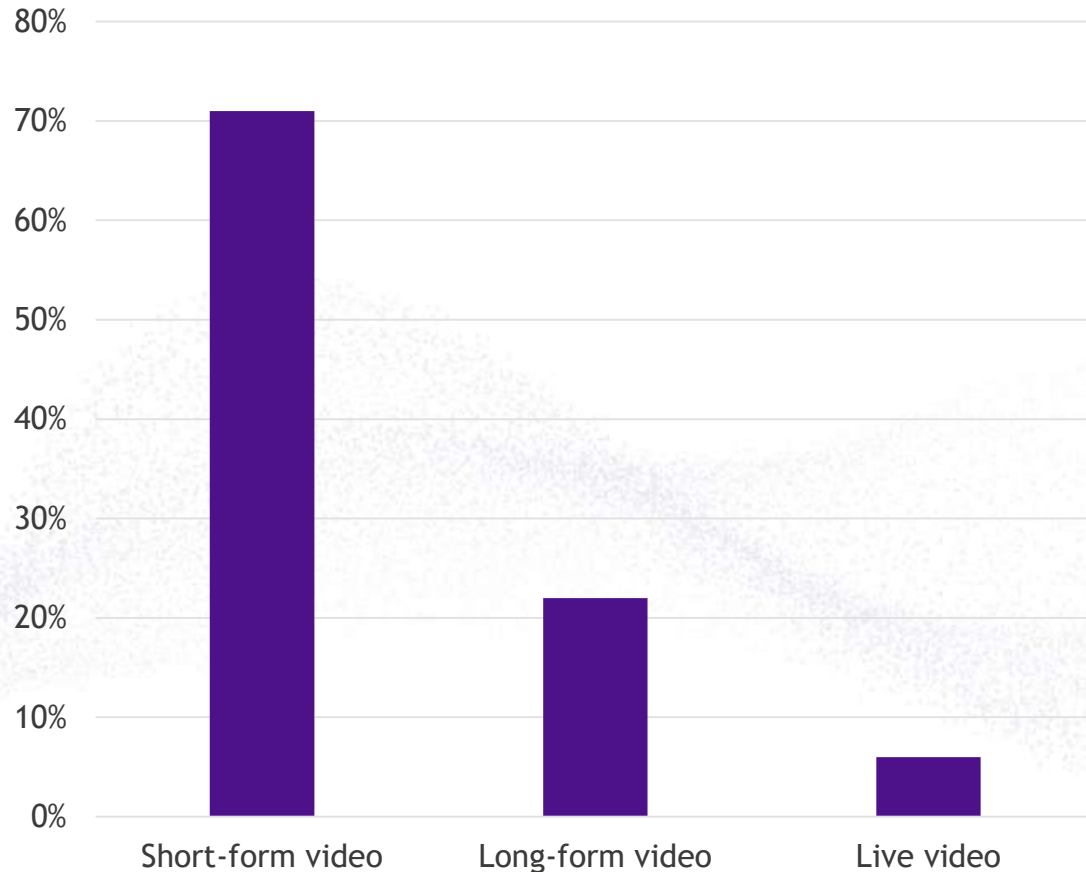
GEP Insight
MediaTech buyer in an IABM interview

*A regional trend is **more partnerships**. We are focusing now more on international partnerships to have a **wider selection of content**. Go3 is having an integration with discovery+, Paramount+, HBO, Netflix, Setanta Sports. Customers would like to have the possibility to watch both **premium international content** as well as **premium original [local] content** that tells about them. We need to provide them that.*

Andrejs Obodnikovs
TV3 Group Latvija (GO3)
(February 2025)

Broadcasters are learning to monetize “the fat end of the long tail” by advertising on social media

What video format offers the highest ROI?



MediaTech supplier in an IABM interview

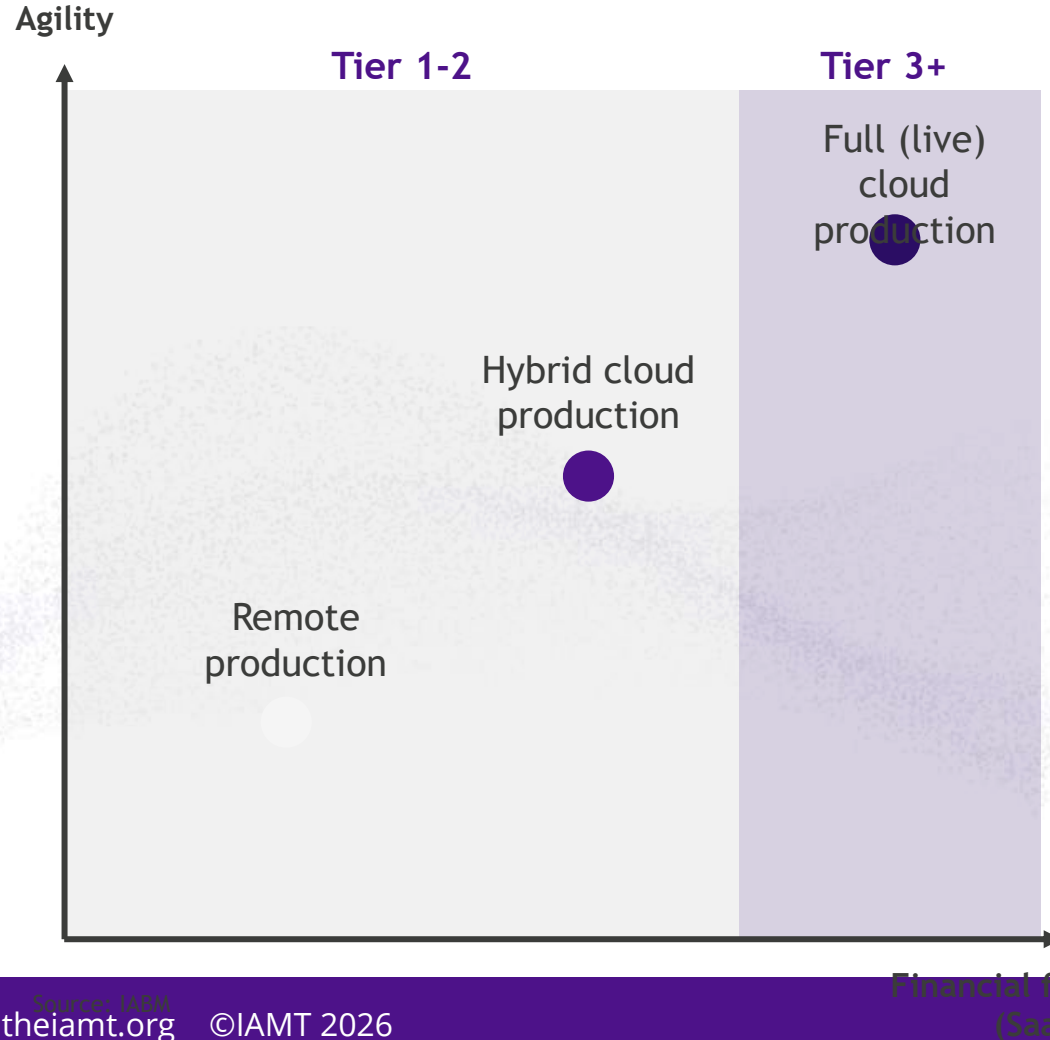
*There is a **Gen Z** and **Alpha** audience now growing up who don't understand what linear TV is. They don't understand anything that isn't delivered as a stream. This is already leading to the incredible rise of **YouTube** as a **TV** video platform. It's now in the **UK** the single **biggest TV** platform for the people under the age of 35 and that's a combination of **live** and **VOD** and most of it is on TV. There is more consumption of YouTube on television than most of the other traditional TV platforms. Things are changing fast.*

Gareth Capon
CEO at Grabyo
Europe
(February 2025)

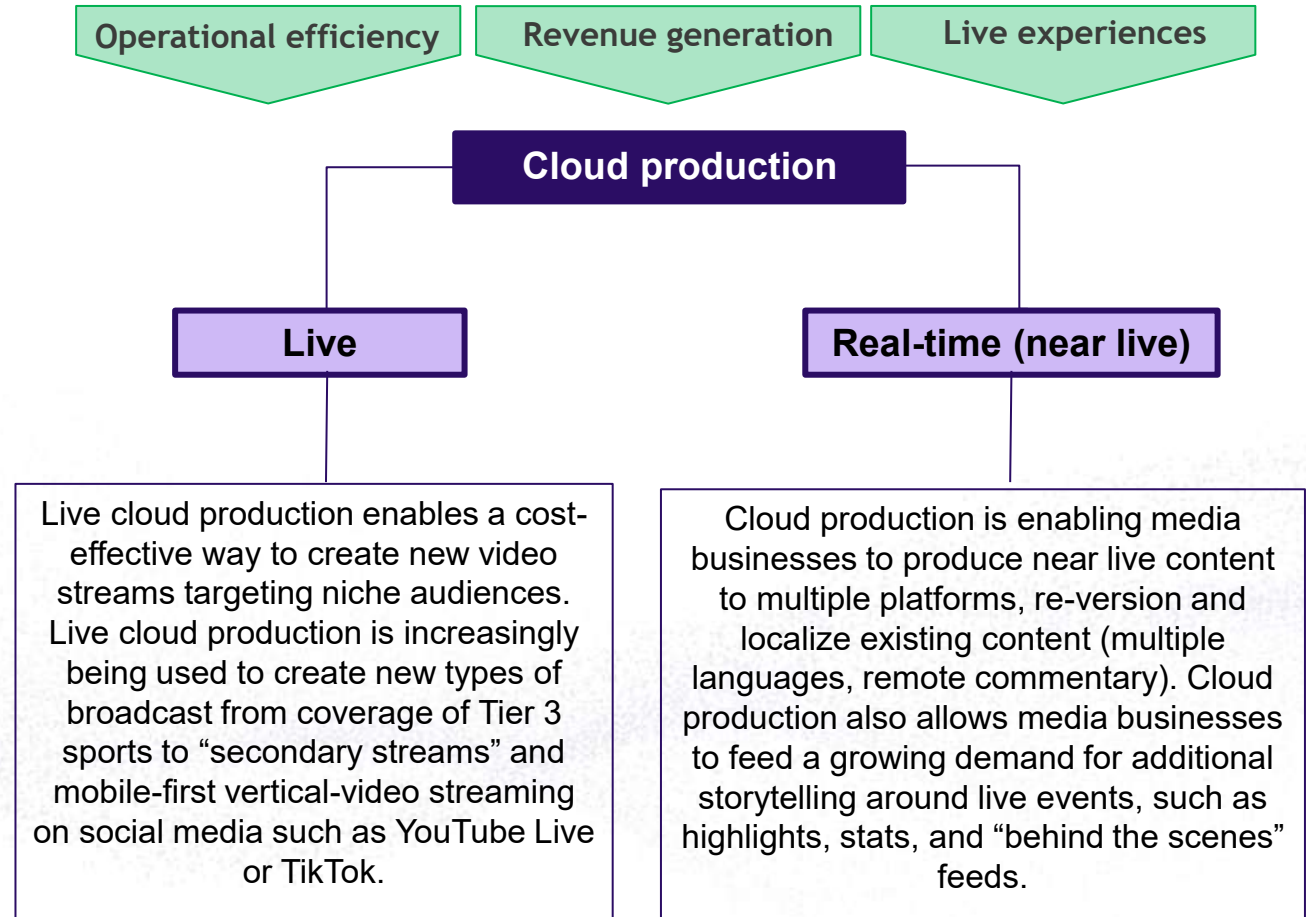
Europe – MediaTech Investment

Media businesses are seeking operational efficiency from hybrid and live cloud production

Advantages of live cloud production by use case



Key drivers for cloud production



MediaTech supplier at an IABM interview

*Things like Premier League and NFL are multi-year deals and they are quite difficult to get – the winner takes it all whoever bids for them. That can have an impact on the budget available to produce the event itself because so much money has already gone to buy those rights. We see many customers using a **combination of traditional**, but also more **cloud-based production**, even in the **live** production space. So, they still have the more traditional [equipment] but that's for the premium top content, while on the **non-premium** content side they try to cover by using this other [cloud] technology.*

Major camera manufacturer
Europe
(October 2024)

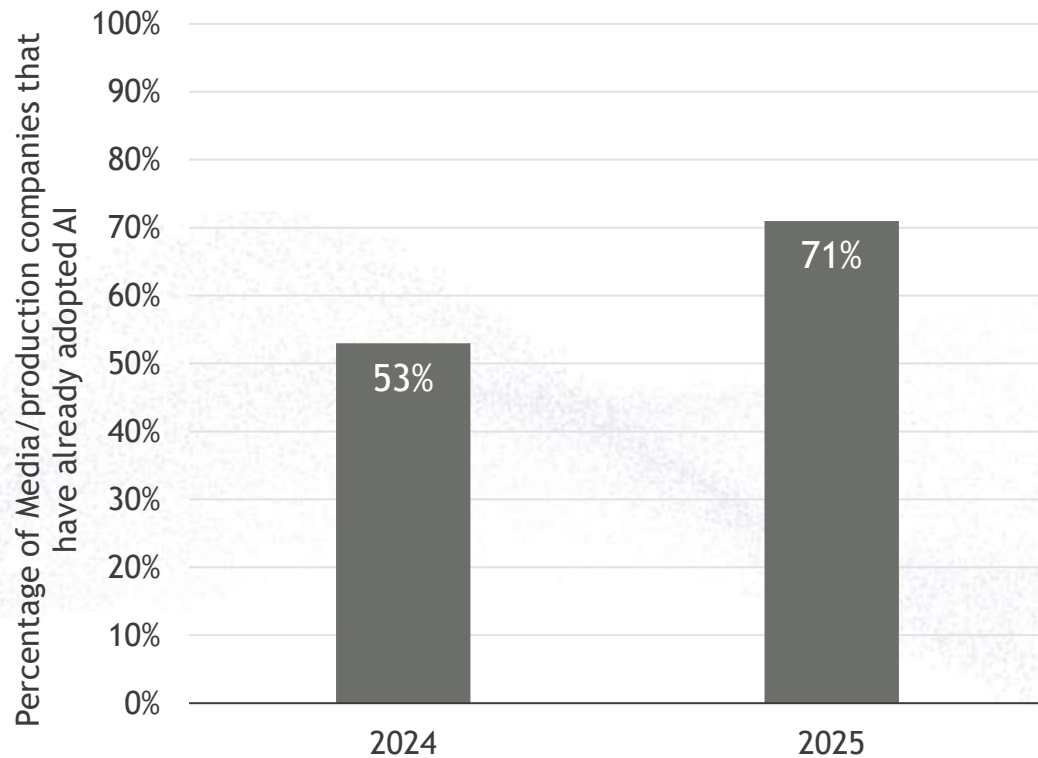
MediaTech supplier in an IABM interview

*You've got the impact of this **creator economy**. They don't have the same set of skills or infrastructure. They want tools which are going to be **available, accessible and cloud native**, because their audience is different and exist on a **social media** platform, but I think everyone focuses on the top end. They talk about the Olympics and there were components which were cloud and hybrid. That's fine, but the Olympics is also a once every four year event with hundreds of millions of dollars of production investment. That isn't really where the **bulk of the market** is. It's in **everything else** where the opportunity exists.*

Gareth Capon
CEO at Grabyo
Europe
(February 2025)

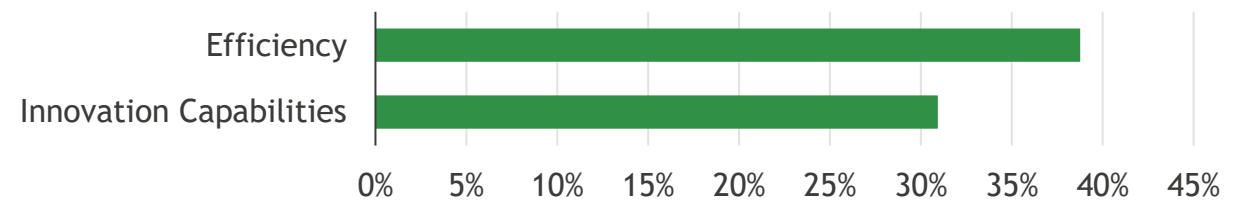
The need for efficiency and innovation is driving AI adoption in Europe

AI & ML adoption by media and production companies



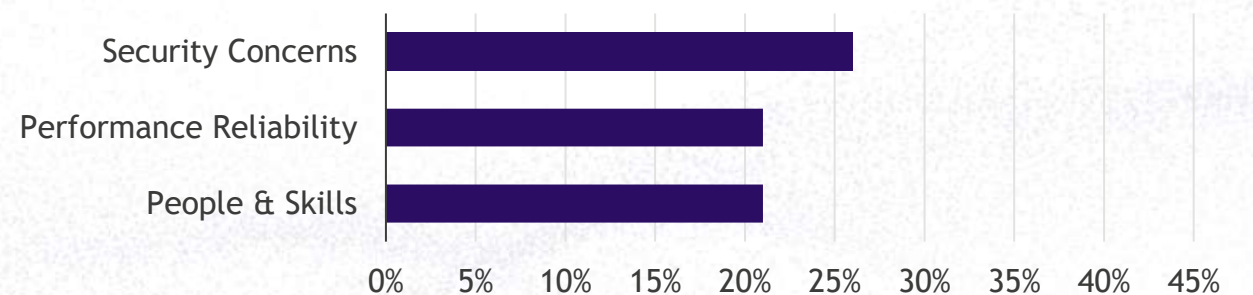
Q. Which of the following technologies has your organization already adopted? (Europe, 2024 n=15, 2025 n=17)

Drivers of AI & ML adoption



Q. Please select the most important driver of adoption for each of the following technologies? (Europe, 2024-2025, n=26)

Constraints for AI & ML adoption

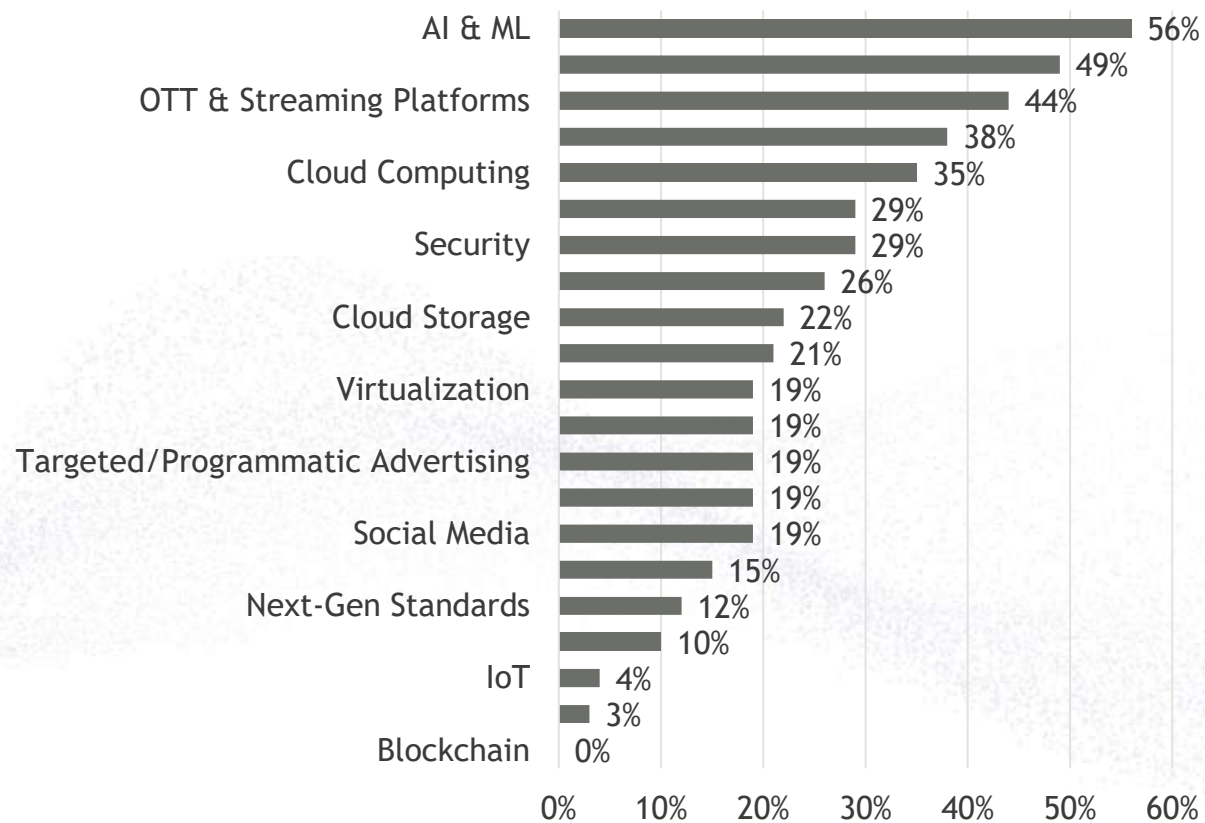


Q. Please select the most important constraint for adoption for each of the following technologies. (Europe, 2024-2025, n=34)

Europe – MediaTech Investment

Broadcasters are looking for efficiency gains from intuitive, collaborative AI and remote production tools

Trends in Technology Roadmap



Q. What are the most important trends in your organization's technology roadmap?
(All industry, Europe, 2025, n=68)

GEP Insight

MediaTech buyer in an IABM interview

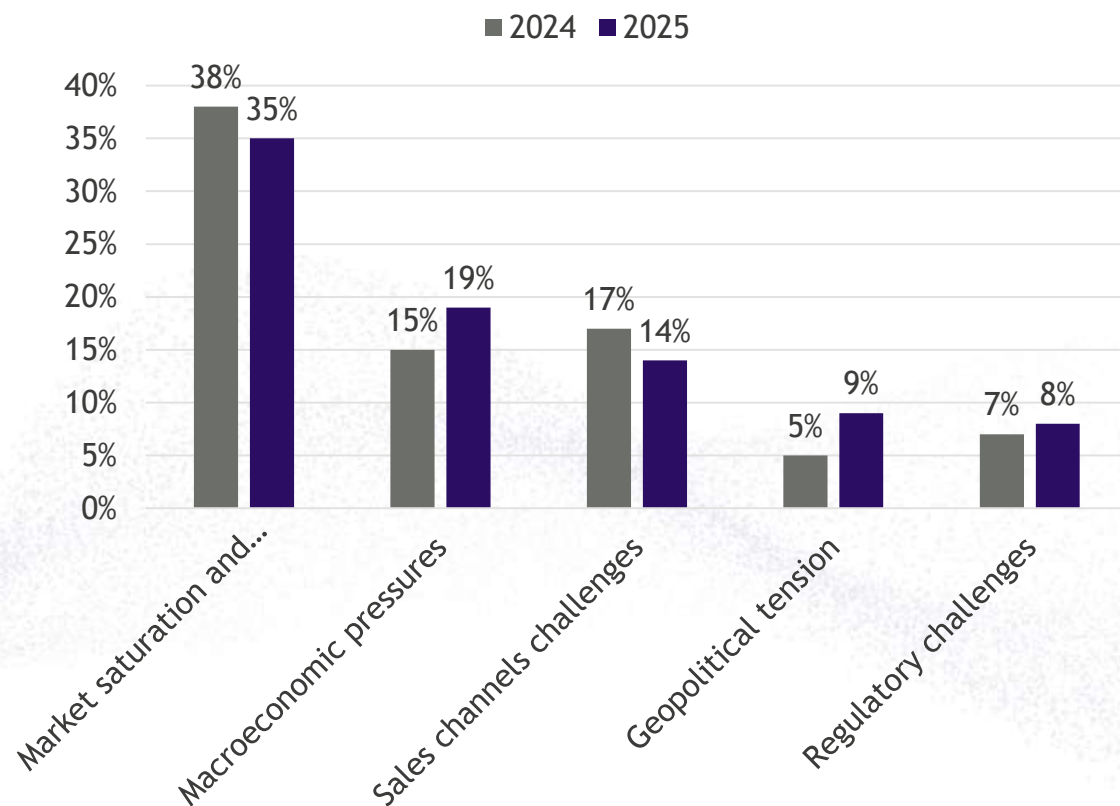
*Everybody's talking about **AI**, **ChatGPT** and **DeepSeek** these days. We're seeing that AI definitely comes with a lot of new tools, and I would say it's the **journalistic area** that fits very nicely for **first AI use** and gives us a lot of **new tools**, but we really wanted and were looking for more **cloud possibilities** in this [AI usage]. We haven't really seen the biggest system moving to the cloud yet. The biggest problem with cloud is the **cost** level.*

Geir Bordalen
Head of Technology Portfolio
NRK
(February 2025)

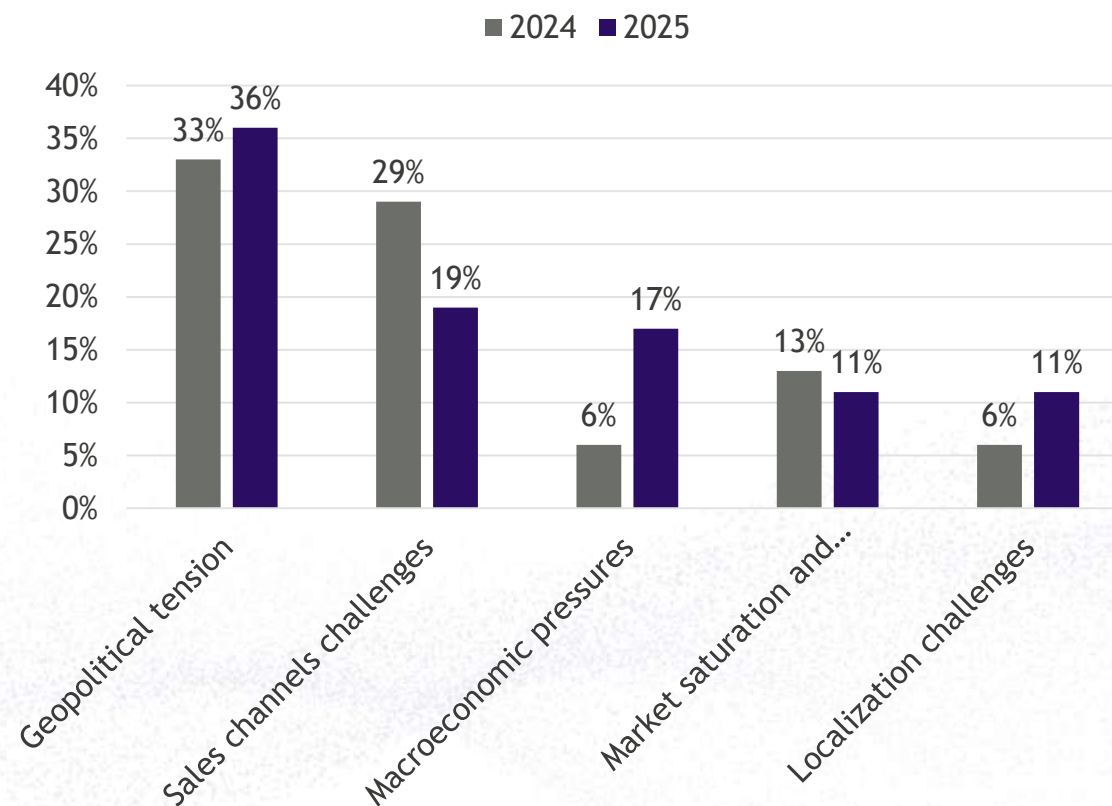
Europe – Challenges

Macroeconomic pressures and geopolitical tensions are hindering business growth in Europe

Top 5 regional barriers to growth in Western Europe



Top 5 regional barriers to growth in Eastern Europe



Q. What is the major regional barrier to the growth of your business in each of the regions where your company operates? (All industry, Western Europe 2024 n=98, 2025 n=78; Eastern Europe 2024 n=70, 2025 n=53)

Fixed mindsets and skillset shortages are hindering media companies' business transformation

Mindsets

*People are worried and technology is changing. People are thinking what will be my role in a year or two. [...] Everything is changing so fast. We need to understand the **human side** of how **people feel** in this environment. Then people will respond to that by sharing your **vision**.*

Maja Davidovic
Director of Education
SMPTE
(April 2025)

Skillsets

***Skills** are a massive problem, and now you need to add **AI** knowledge on top, making the expertise even **scarcer**. It's also exorbitantly expensive to hire people with these skills: as soon as you have qualifications in AI, or you're a senior developer, you're looking at a minimum wage of £80k per year - or more realistically **£120k+**.*

Damon Neale
Founder & CEO
Metadat-AI
(February 2025)

Data

*The broadcast industry has to solve its **data problem** first – what have I created, **where is it** and how can I make sure I have this **data in a format** that I can **leverage** the viewing and entertainment patterns that people are consuming content today in **digital-first** environments?*

Sean King
CRO & GM
Veritone
(April 2025)

Geopolitics

*We found out that with this scenario of **underwater cables** being **damaged** we do not have any third option to deliver the signals for production. This is the main challenge we are having now – having everything ready for **disaster**. That's why we are looking more into using **public internet**.*

MediaTech buyer
Europe
(February 2025)

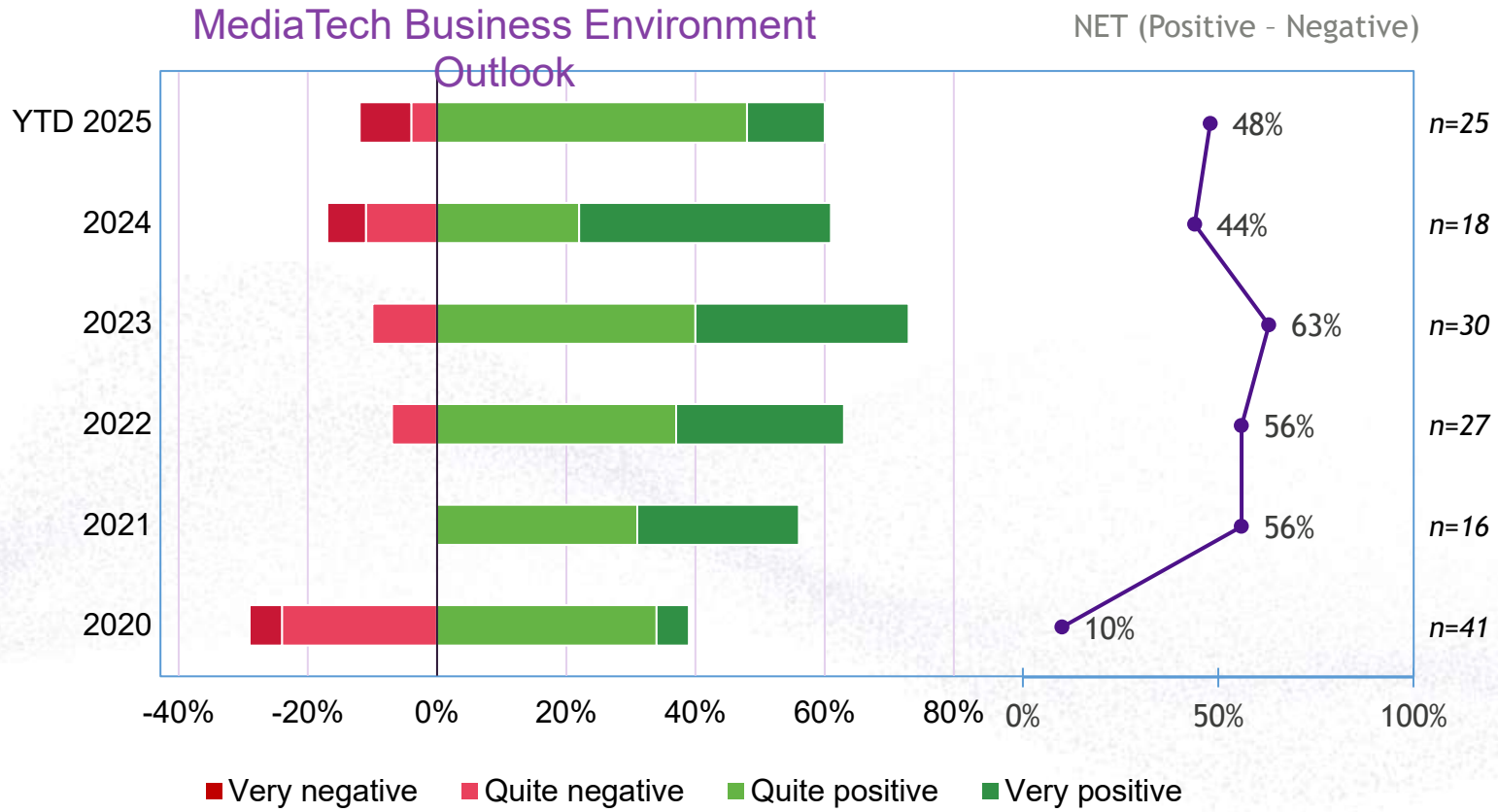


GeoAnalysis – Asia-Pacific

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Asia-Pacific – Business Environment

The business environment in APAC shows increasing levels of uncertainty



Business Confidence

In the Asia-Pacific region, the business environment outlook shows increasing uncertainty: while the overall positive outlook remains stable (60%), almost half of the predictions (26%) changed from very positive to quite positive, and the neutral outlook increased by 6 percentage points.

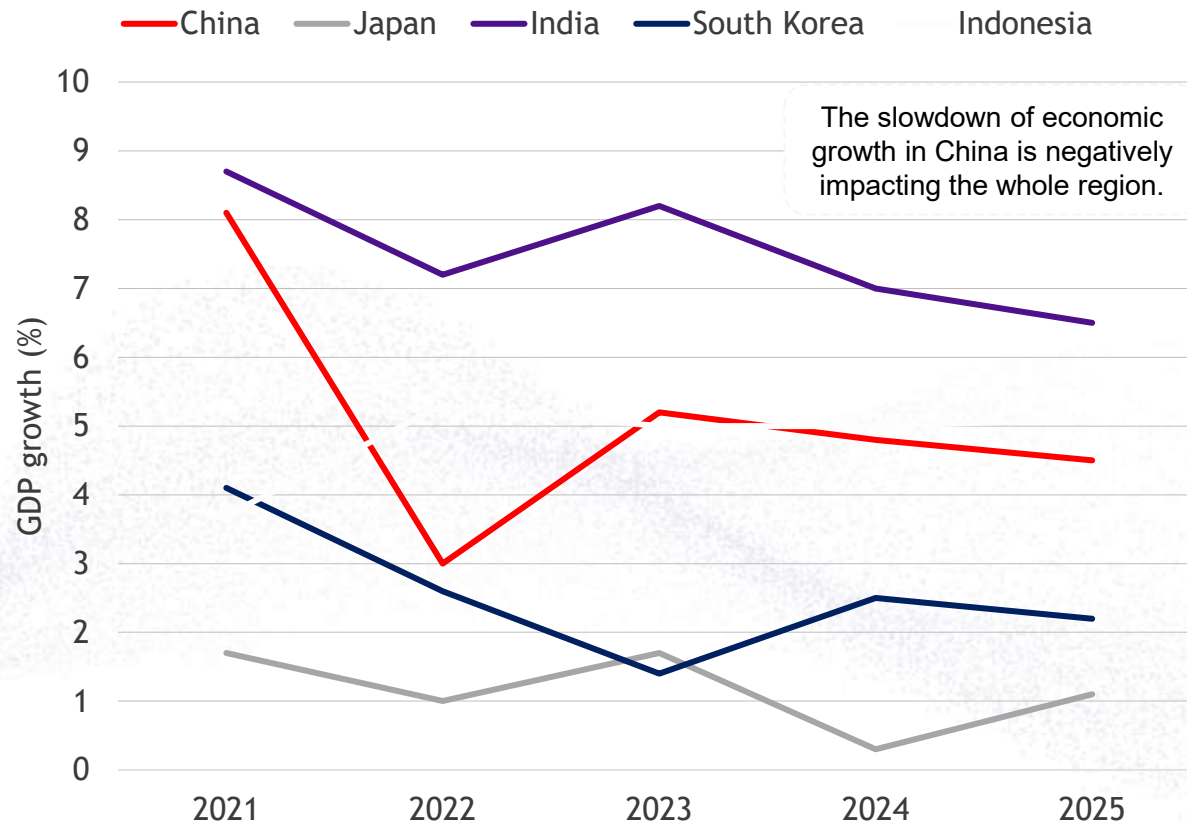
This growing uncertainty is mainly driven by rising geopolitical tension with the US, including trade restrictions.

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

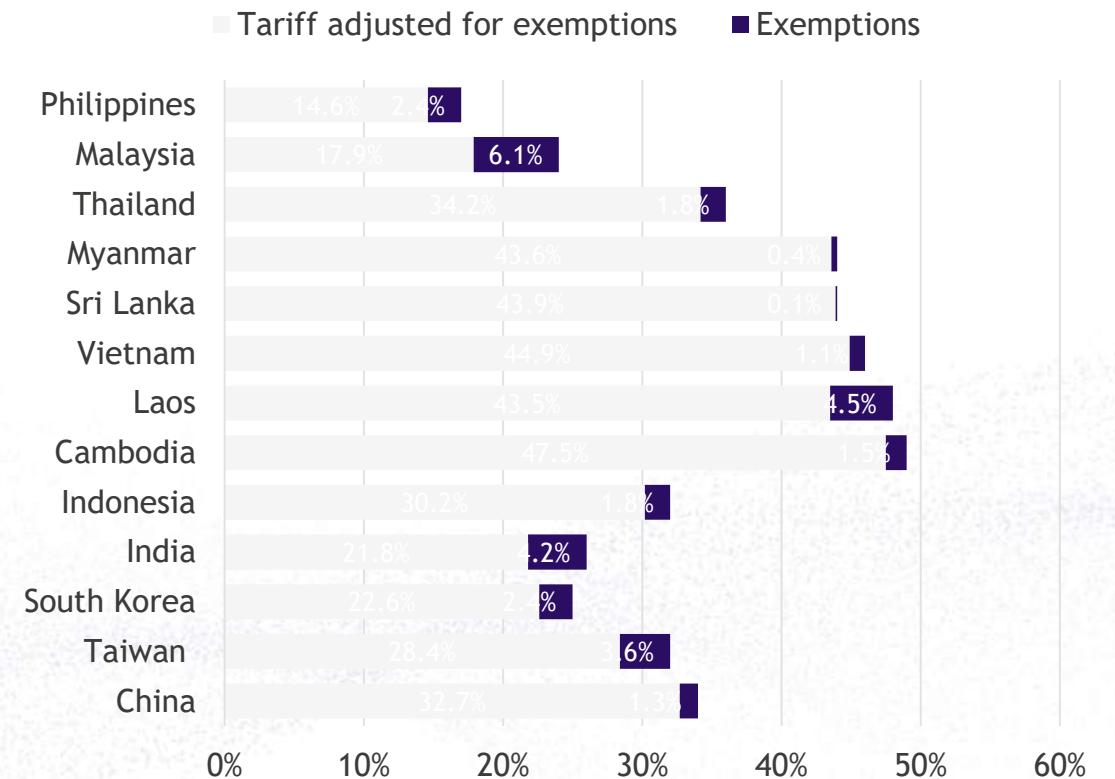
Asia-Pacific – Business Environment

MediaTech market in APAC remains flat due to economic uncertainty and slow growth in China

Real GDP growth in top 5 largest economies in APAC



US tariff hikes on Asian economies (as of April 2025)



Budgets are getting tighter and investment remains flat, except in South East Asia (SEA)

MediaTech supplier in an IABM interview at NAB

*The Asian economy as a whole is generally **slowing down**. In the ASEAN region, a lot of media companies are **restructuring** and operations are regrouped, **reducing manpower** and **investment**. For example, in Thailand, local digital TV operators are having a “hold” position because of the NBTC regulation decision on whether to extend the digital license or not. However, I believe there will still be investment, but obviously now the **recent tariff** debates might have put some consideration on how our clients will invest in their tech infrastructure. In Japan, the **weak currency** against USD is affecting a lot of budget planning.*

MediaTech supplier
Singapore
(April 2025)

MediaTech supplier in an IABM interview at NAB

*The **Japanese** market is very **conservative** and customers don’t buy easily. They request POCs, demos and gather information about any new technologies like IP. Customers are insecure and **risk averse** towards new technologies. They might ask where the data goes from IP or cloud. Customers don’t want to be part of references either. While **IP** is emerging in Japan and everybody is buying **IP test equipment**, there are lots of **skill gaps** and the lack of IT people is a big challenge. In general, **budgets are tighter** and **weak Japanese Yen** has made it difficult for buyers as it has lost **50%** of its value over the past three years, causing **cancellations** of projects.*

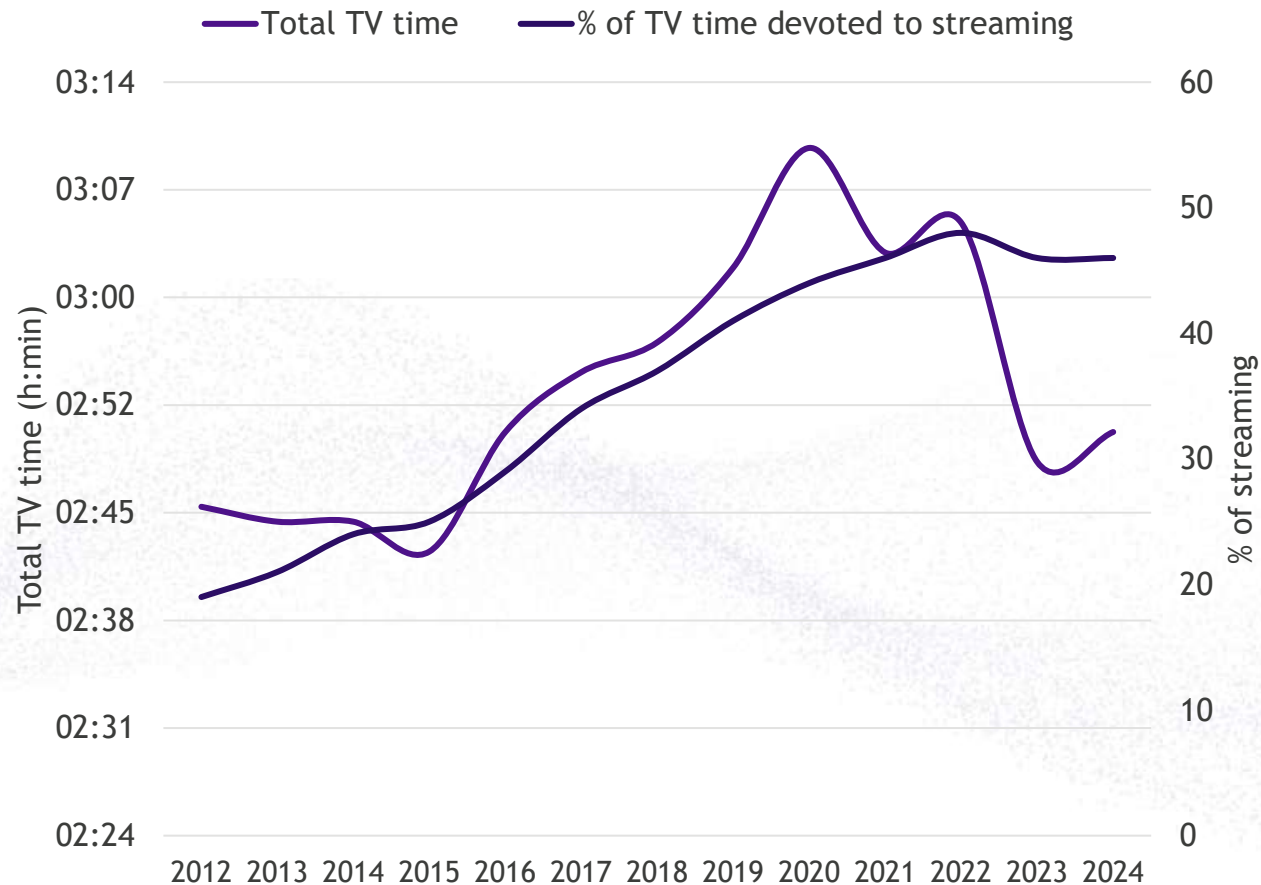
MediaTech supplier
Japan
(April 2025)

Asia-Pacific – Business Transformation

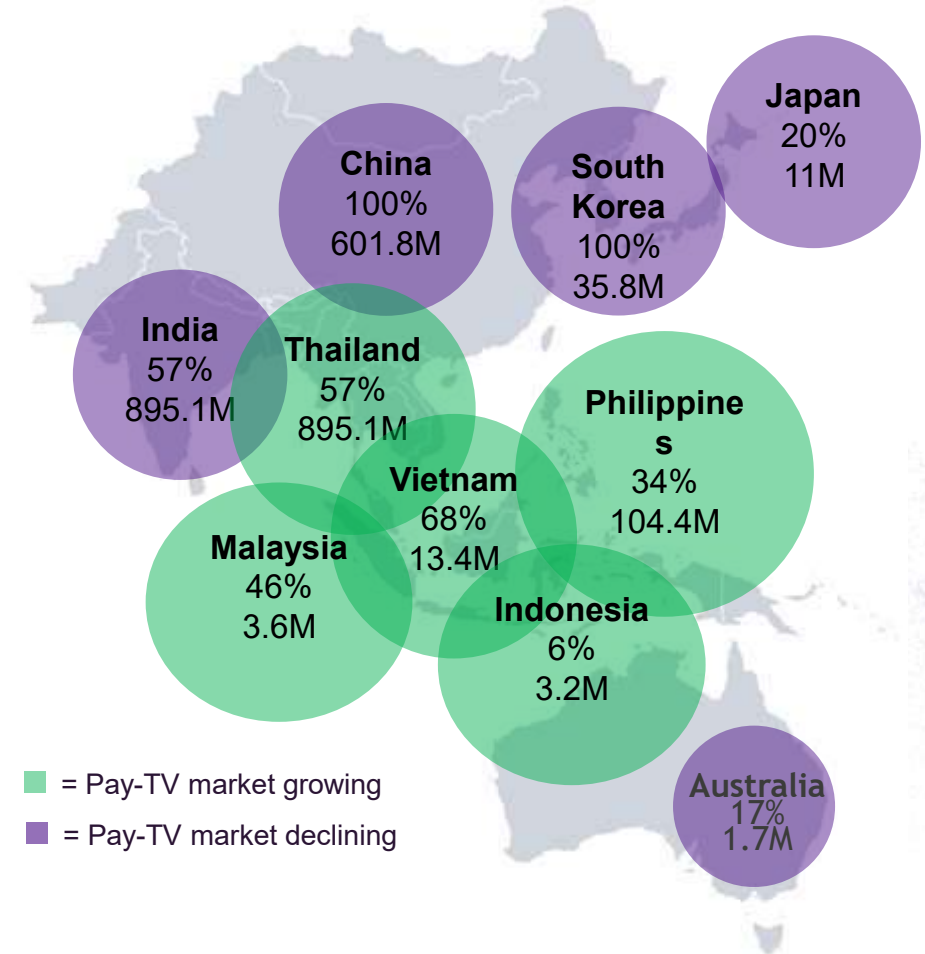


Streaming is overtaking linear TV viewership, despite the growth of Pay-TV market in SEA

Average daily TV viewing time in APAC

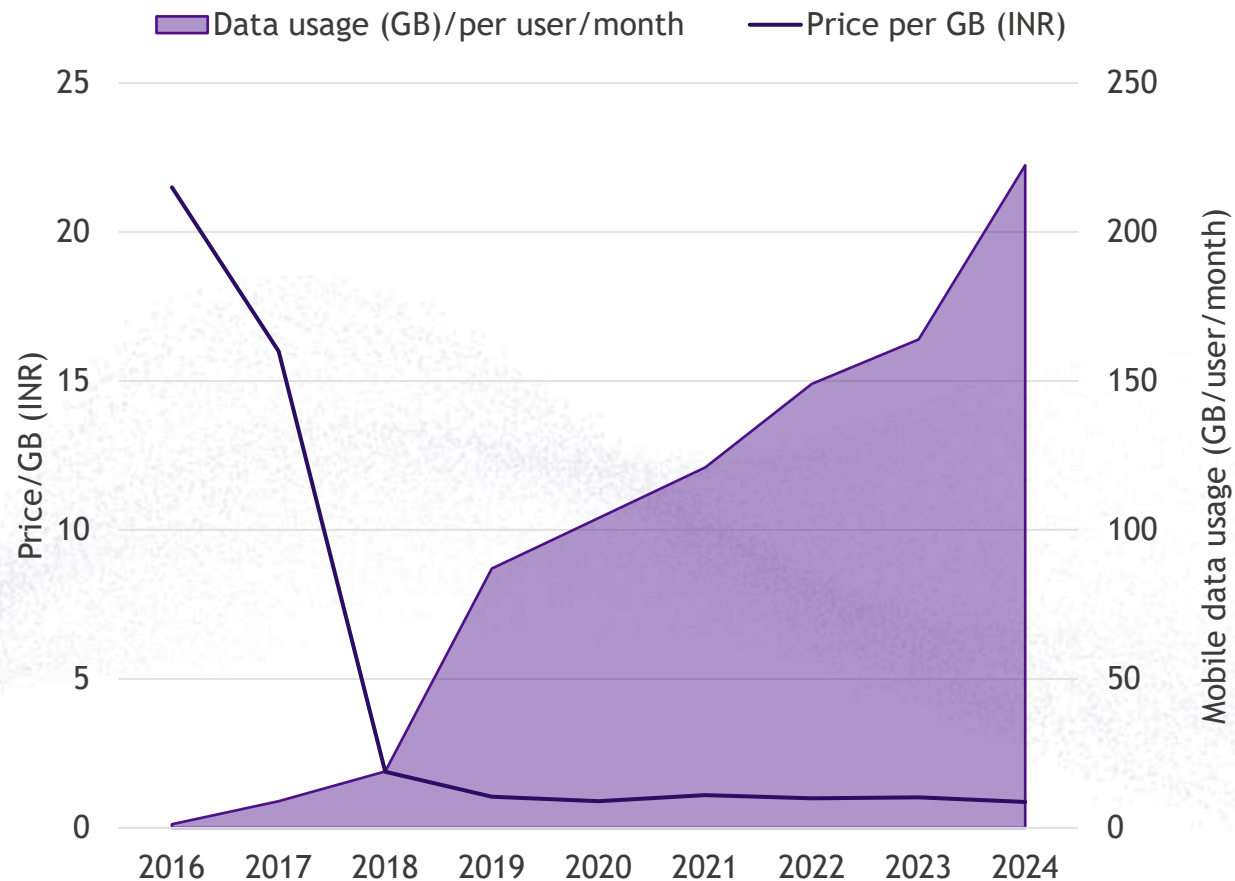


APAC Pay-TV penetration and Pay-TV subscribers by country in 2024

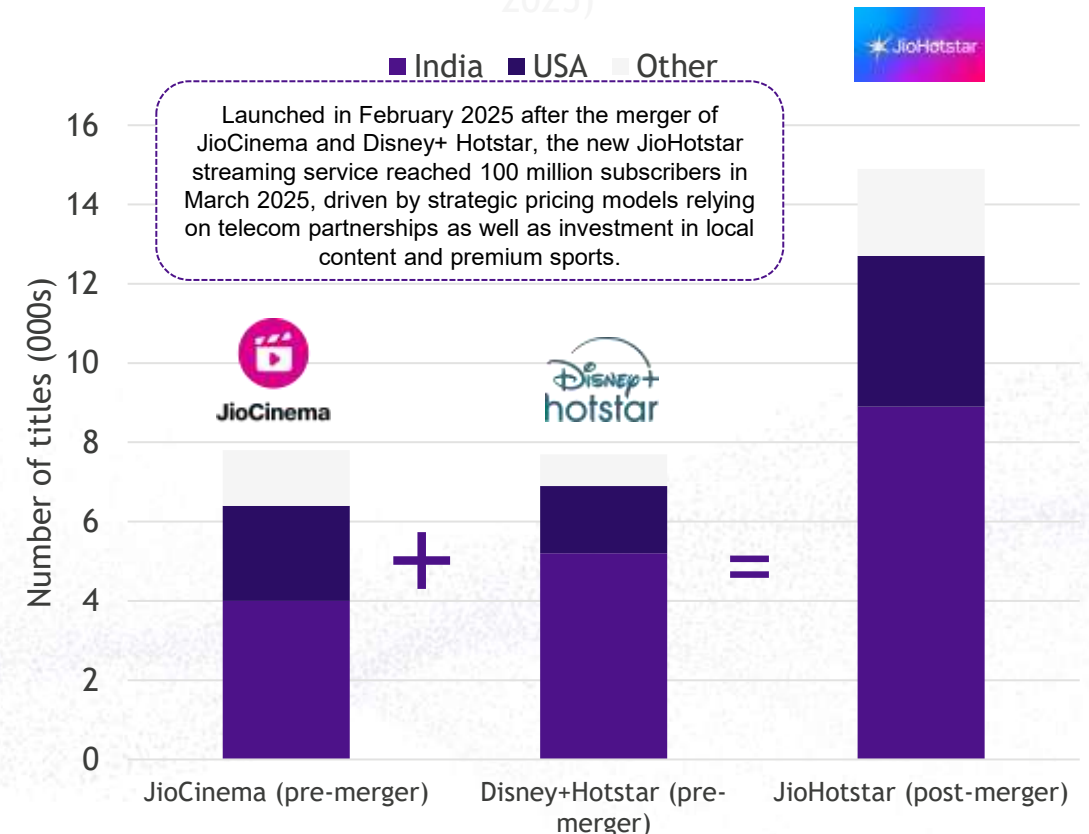


Indian OTT market continues to grow, driven by cheap mobile data and local content investment

Mobile data pricing and usage in India

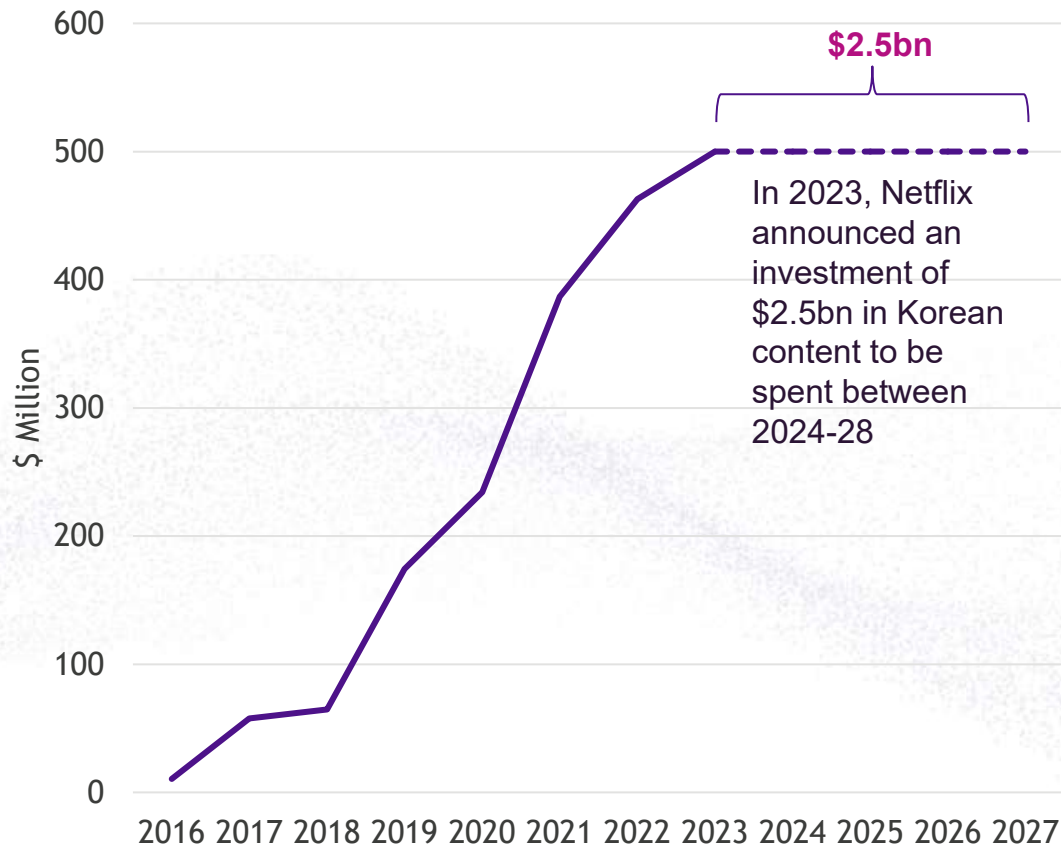


Number of movies & TV seasons available by production country on JioHotstar (Dec' 2024 - Feb' 2025)

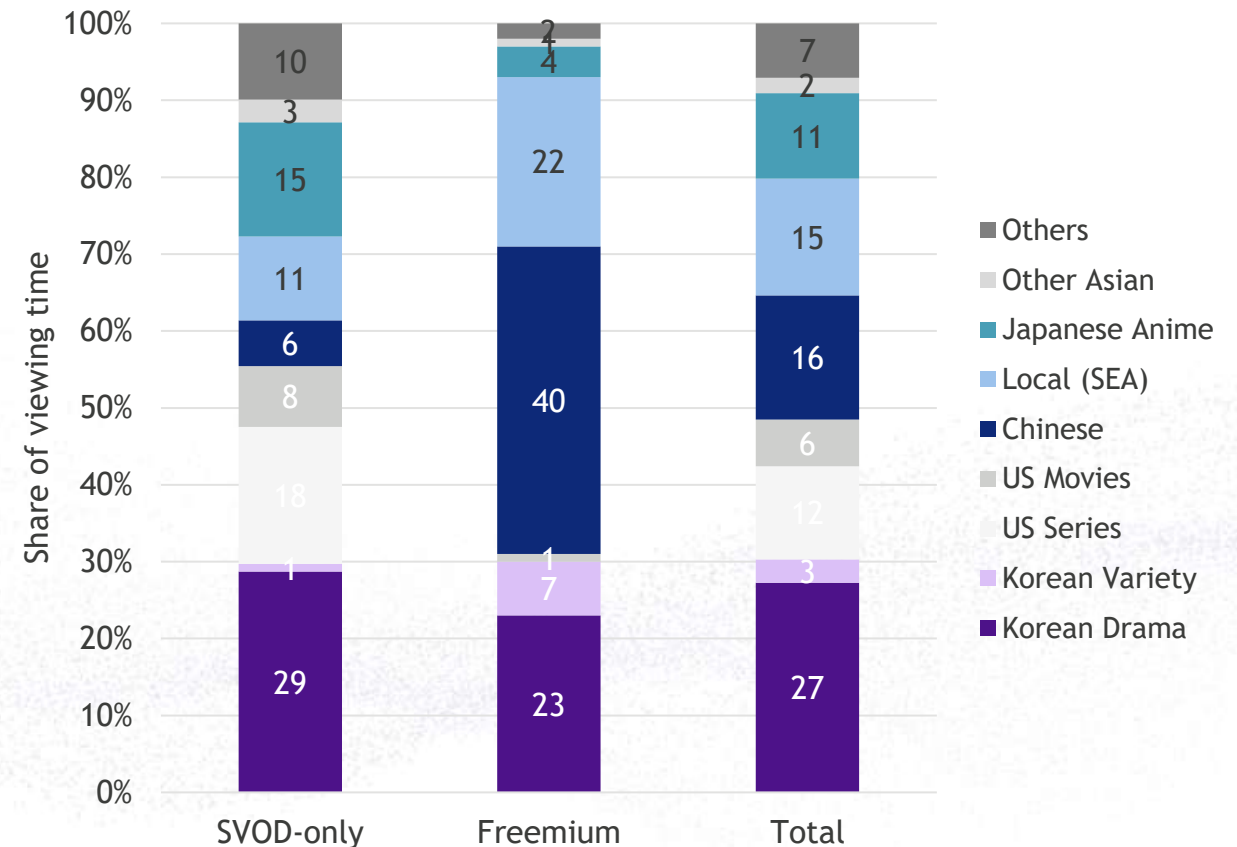


Global streamers' investment in premium Korean content is boosting subscriptions in SEA

Netflix investment in Korean content



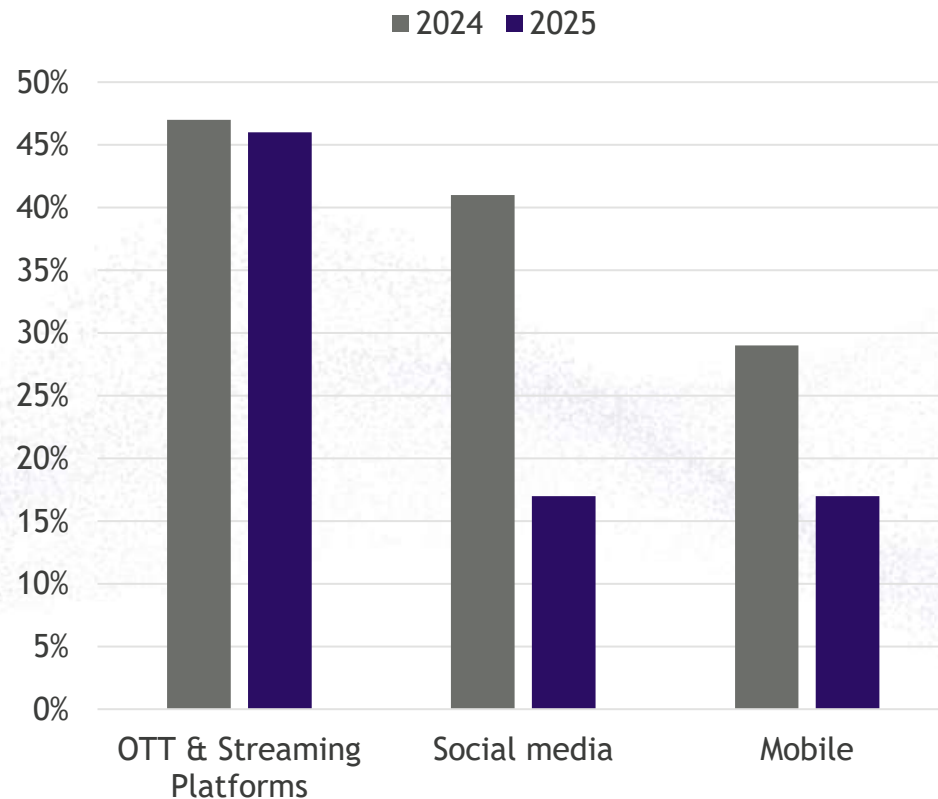
Southeast Asia - Premium VOD viewership (2024)



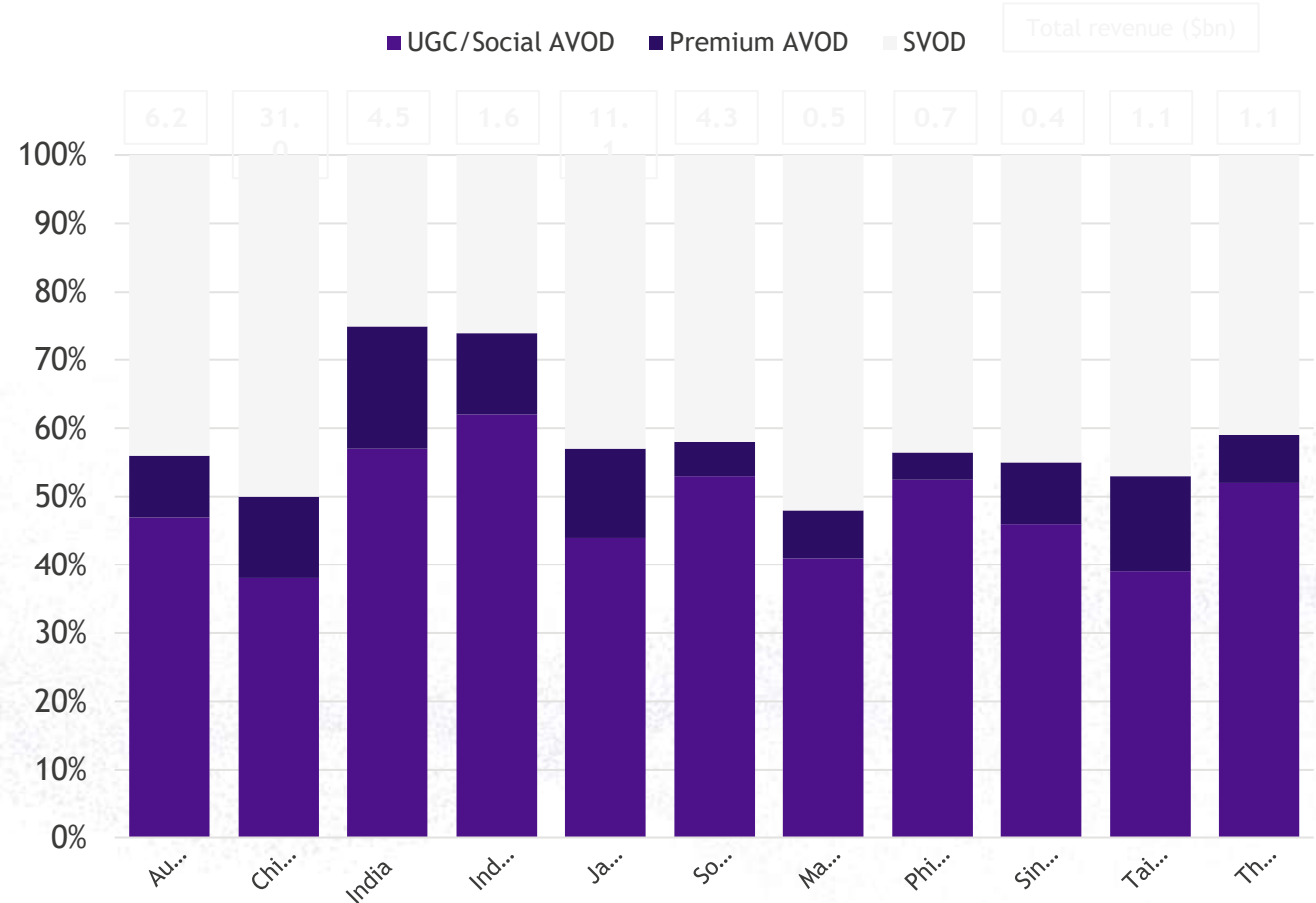
Asia-Pacific – Business Transformation

Social media and mobile are maturing in MediaTech roadmaps, while premium OTT is up

Social media and mobile in Media Tech suppliers and buyers' technology roadmap - APAC



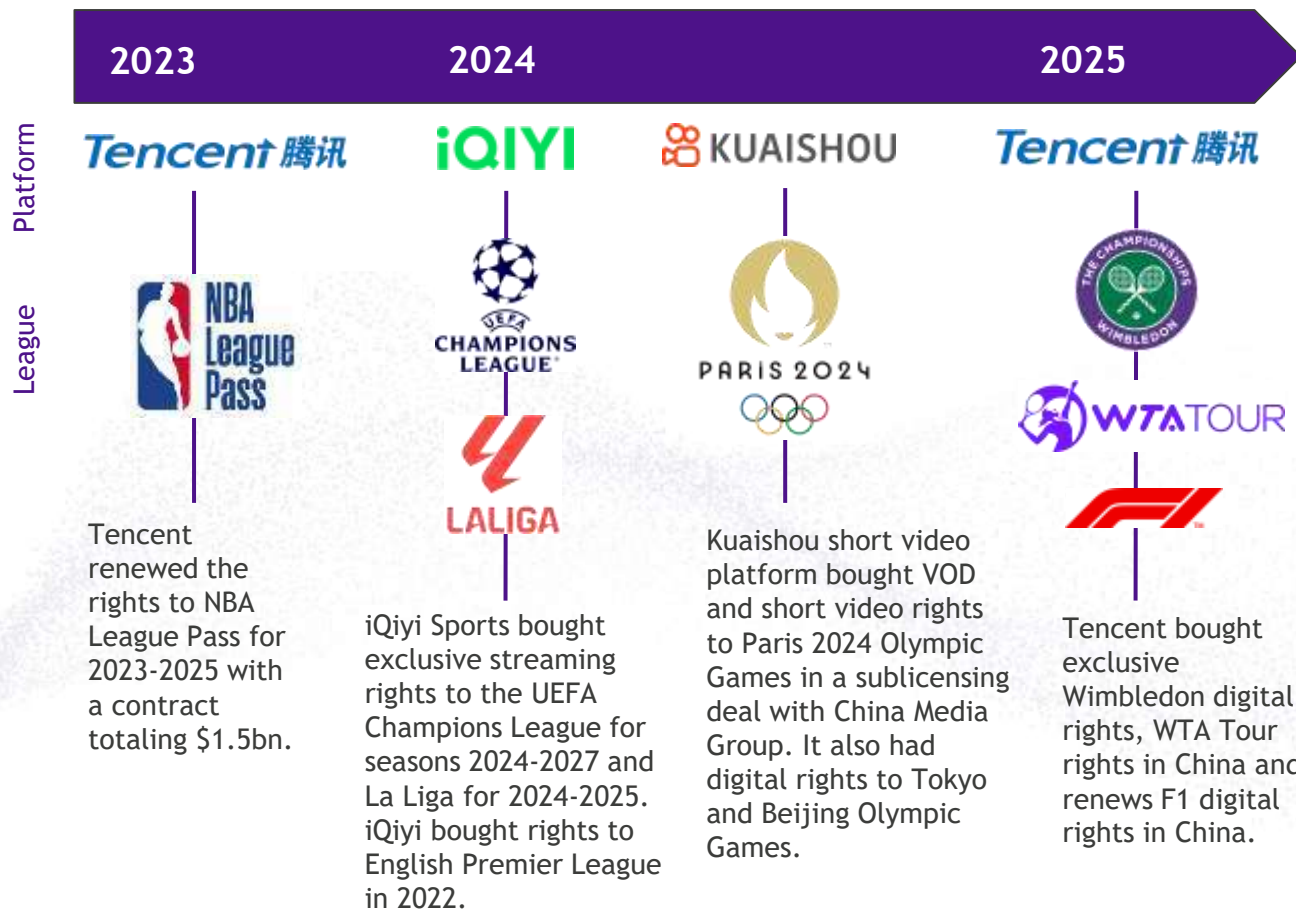
Online video revenue by key markets in APAC (2024)



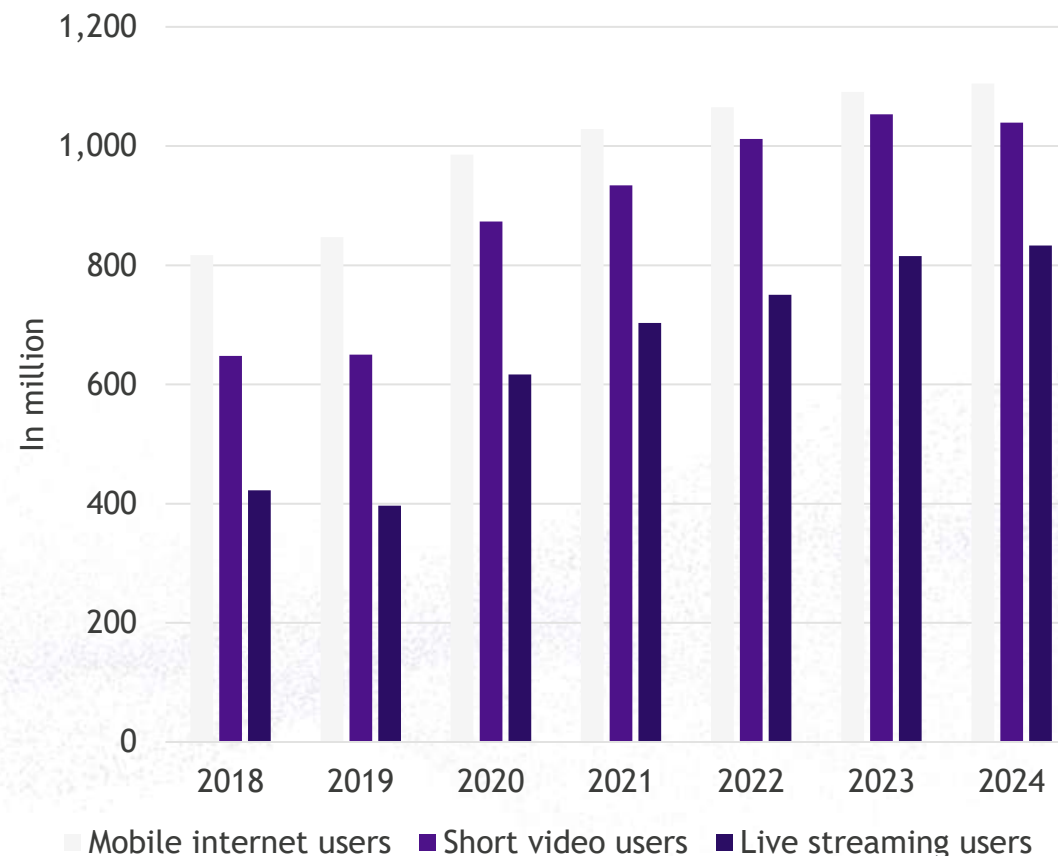
Asia-Pacific – Business Transformation

Chinese social media platforms are investing in live sports and fan engagement

Recent media rights deals by social media platforms in China

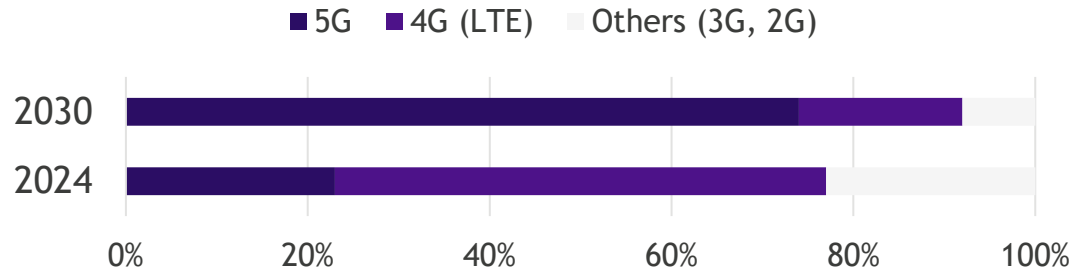


Total annual mobile internet, short form video, and live streaming users in China

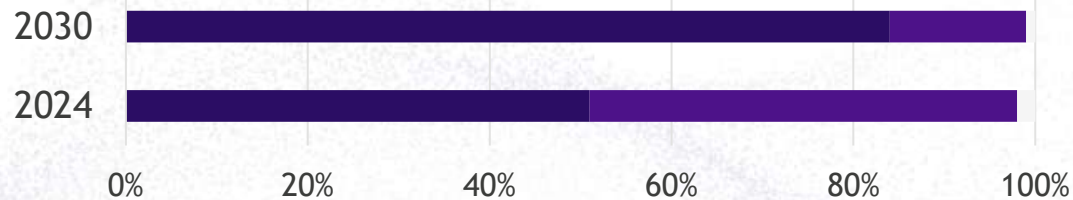


Telcos keep investing in 5G to accommodate growing AI traffic and immersive video streams

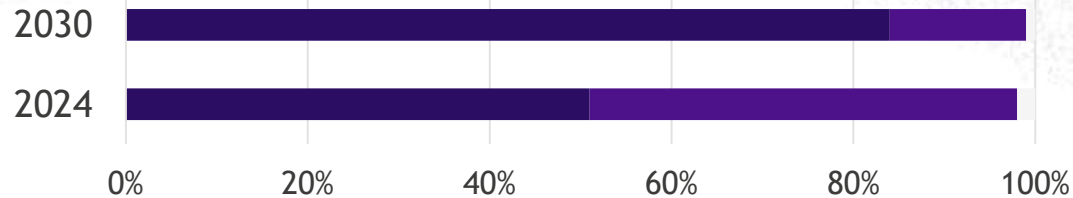
Mobile subscriptions - India, Nepal & Bhutan



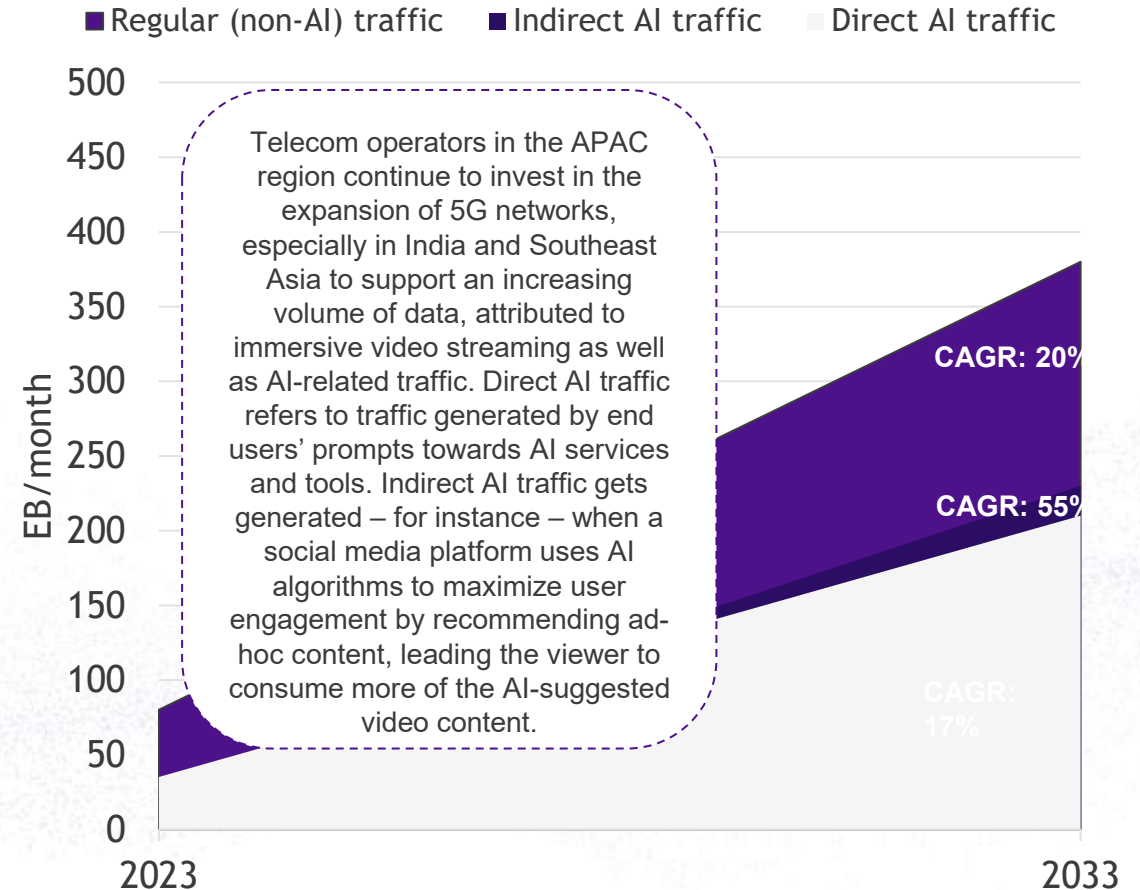
North East Asia



South East Asia



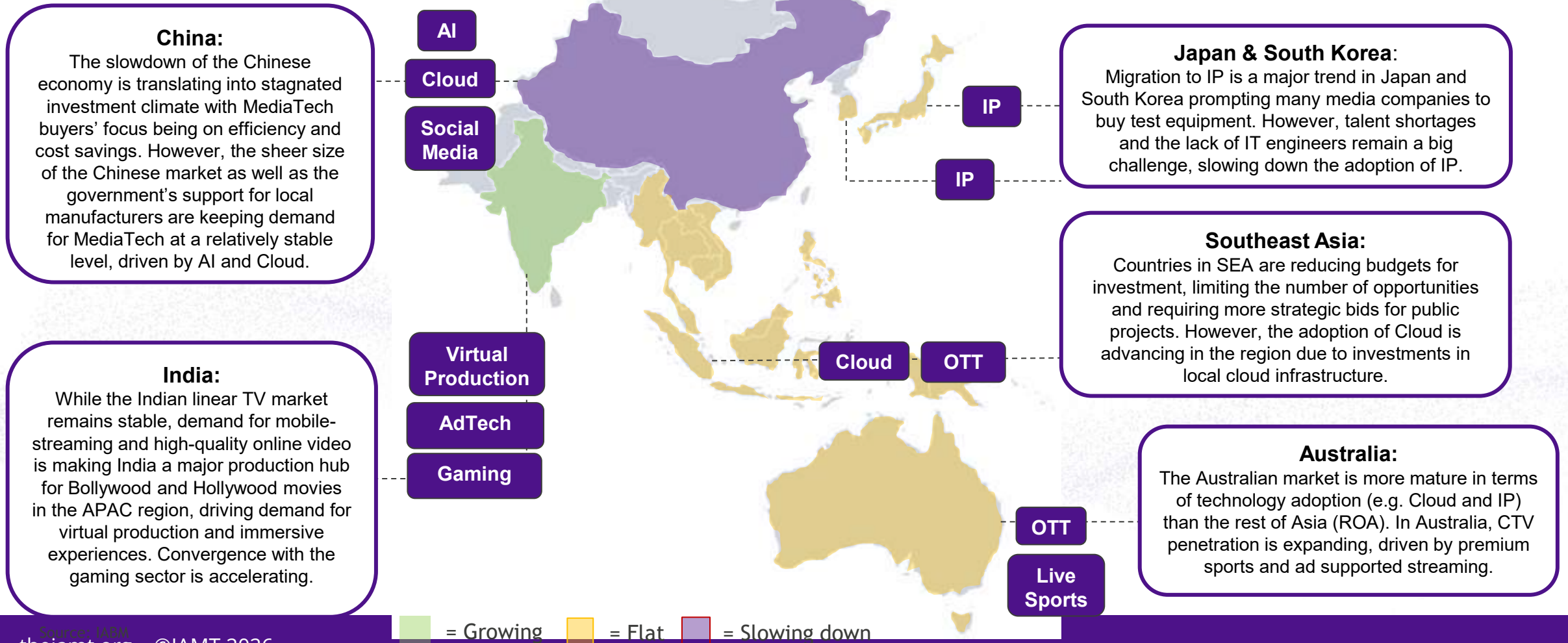
Consumer mobile (AI) traffic globally - Projection



Asia-Pacific – MediaTech Investment

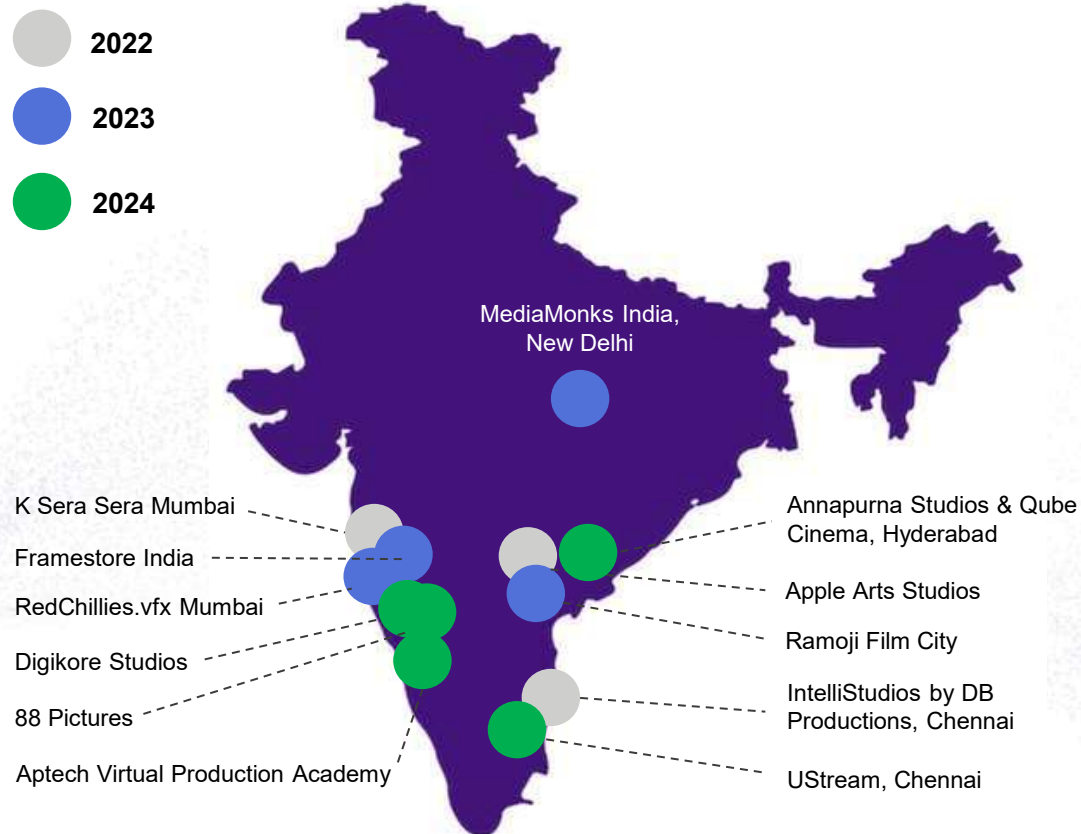
MediaTech market remains flat due to macroeconomic pressures and geopolitical uncertainties

MediaTech market outlook in APAC



Streaming boom and rapid growth of online gaming are catalyzing demand for virtual production

Major virtual production studio launches in India 2022-2024



GEP Insight

MediaTech buyer in an IABM interview at NAB

*The **streaming boom** has significantly increased **local production** in India. Pre-OTT, we would do about 1,800 films, which is about 3,500 hours of cinema per year. With OTT, we've crossed that already – we're doing about **4,000 hours** of original **streaming** content every year, on top of the 3,500 hours of cinema. We are also doing about **150,000 hours** of original **television** content every year and **millions of hours** of original **YouTube** content. [...] When it comes to certain large tech trends, India is a few years behind the rest of the world so we are just about now starting off on **virtual production workflows**. I would say that India will see all kinds of **immersive experiences**, including in filmmaking over the next few years.*

Chaitanya Chinchlikar
VP & Business Head, CTO & Head of Emerging Media
Whistling Woods Institute of India
(February 2025)

Cloud adoption is picking up as media businesses move to remote production of premium sports

MediaTech supplier in an interview with Asia-Pacific Broadcasting+ (April 9th 2025)

*We're actually seeing a good growing momentum in several regional service providers that are using our technology, and they are doing a **managed solution**. In Singapore, Malaysia, Thailand and other regions, we're seeing a major investment in local cloud infrastructure. The global provider is establishing quite powerful data hubs combined with the one gig and 10 gig and even higher bandwidths and IP links directly to the venues. In more **developed markets**, we're already seeing **hybrid models**, where control rooms are centralized but leverage the cloud to scale up or spin out regional content.*

Kentth Andersson
Senior VP of Sales, Head of APAC
Net Insight
(April 2025)

GEP Insight
MediaTech buyer in an IABM interview

*Cloud technology is changing **sports production**. Now we have **remote live production**. In early days, we used the EFP system for every broadcast, but because there are so many events that need to be broadcast now, we are relying more on **live cloud production**. We don't need to pull a lot of equipment on site. From a technical point of view, cloud-based production has very **low latency** now. In China, **cloud** technology is very **mature**, as we can see from the 2024 Paris Olympic Games.*

MingMing Xu
Associate Professor, Director of Film & TV
Beijing Sport University
(February 2025)

Hyperscalers show signs of delaying announced projects due to tariffs and potential overcapacity

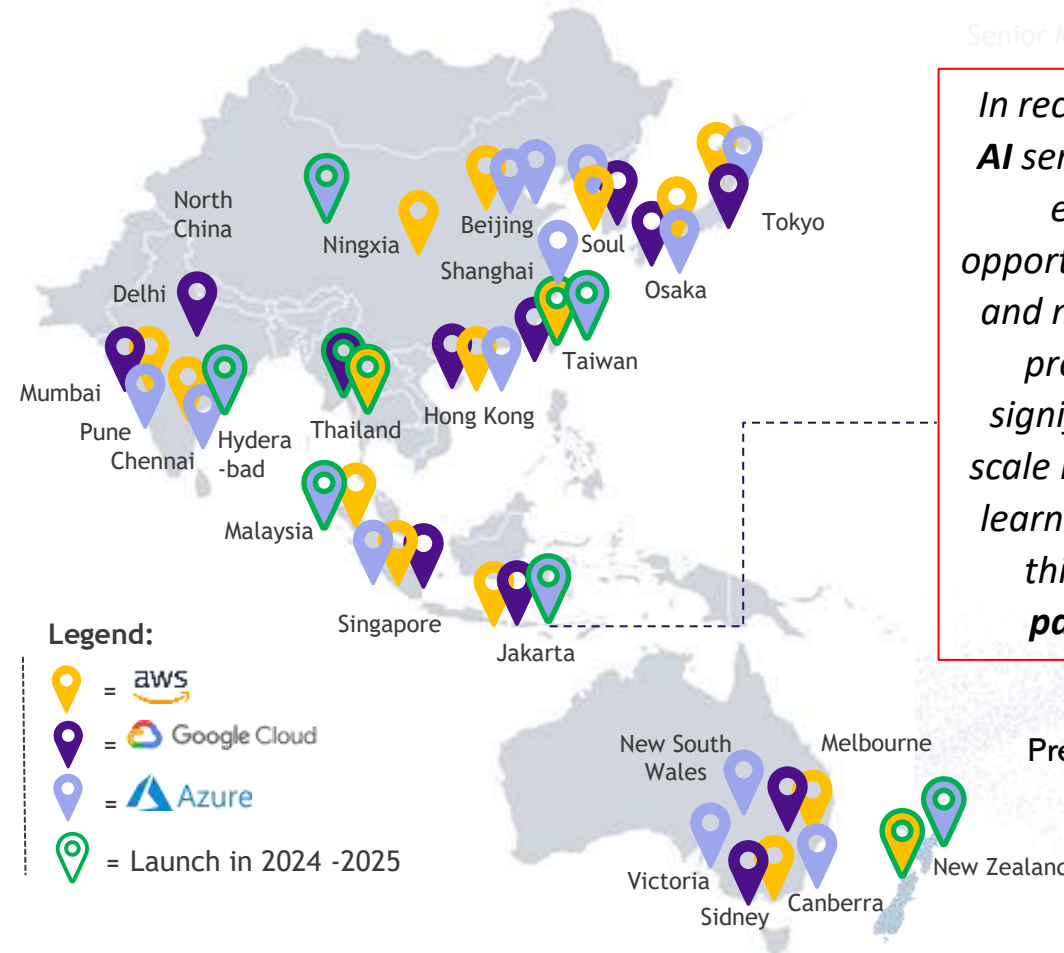
AI infrastructure:

In April 2025, Microsoft announced that it has delayed several data center projects globally, including Jakarta, Indonesia due to the need for “strategic flexibility”. Also, AWS has reportedly paused some of its data center leases and pulled back from some co-location facilities, because the company needs “more capacity in one location and less in another”. This has raised concerns over potential oversupply in AI-dedicated infrastructure in the region, while cost competition around AI training models is intensifying driven by DeepSeek, forcing hyperscalers to reassess their own training resources.

Tariffs:

Recent US tariffs on APAC countries have increased tech companies’ supply chain risks, especially in China, where tariffs on goods were set to 145% (as of April 24th). China is the key producer of AI hardware, while a lot of related electrical infrastructure and data center equipment is manufactured across the APAC region. With high demand globally, this equipment is already in short supply. Tariffs on steel (25%) and aluminum (10%) will likely reduce spending on AI infrastructure.

Hyperscalers’ data center regions in APAC (Q2 2025)



- Legend:
- = AWS
 - = Google Cloud
 - = Azure
 - = Launch in 2024 -2025

Senior Microsoft Executive on a LinkedIn post (April 6th 2025)

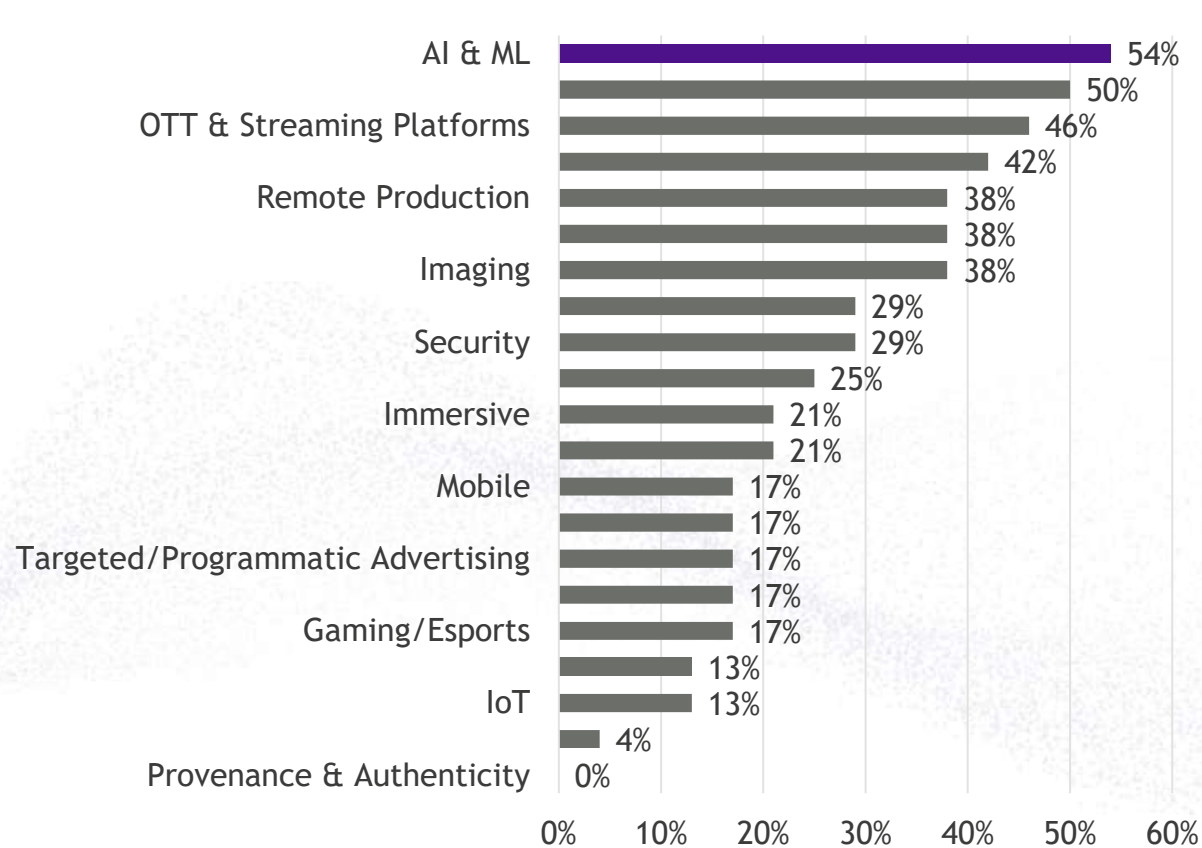
*In recent years, demand for our **cloud** and **AI** services grew more than we could have ever anticipated and to meet this opportunity, we began executing the largest and most ambitious infrastructure scaling project in our history. By nature, any significant new endeavor at this size and scale requires agility and **refinement** as we learn and grow with our customers. What this means is that we are **slowing** or **pausing** some **early-stage projects**.*

Noelle Walsh
President, Cloud Operations + Innovation
Microsoft
(April 2025)

Asia-Pacific – MediaTech Investment

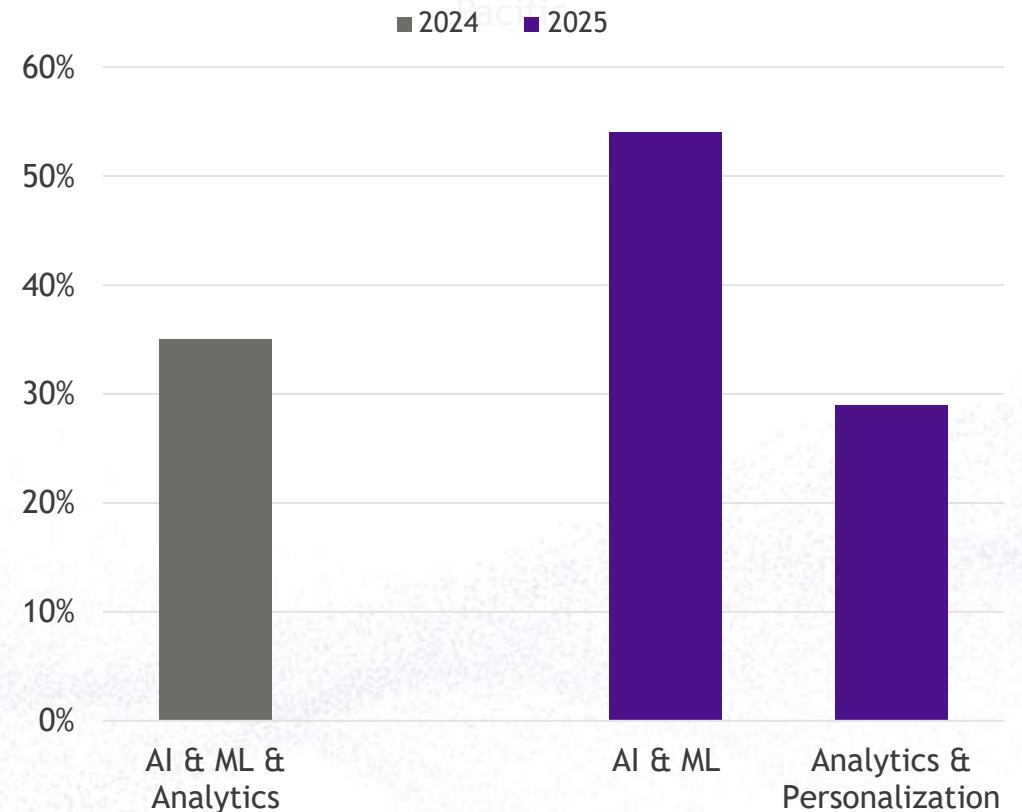
AI is playing an increasingly vital role in the Asia-Pacific region in 2025

Trends in Technology Roadmap



Q. What are the most important trends in your organization's technology roadmap?
(All industry, Asia-Pacific, 2025, n=24)

AI & ML in Technology Roadmaps in Asia-Pacific



Q. What are the most important trends in your organization's technology roadmap?
(All industry, 2024 n=17; 2025 n=24)

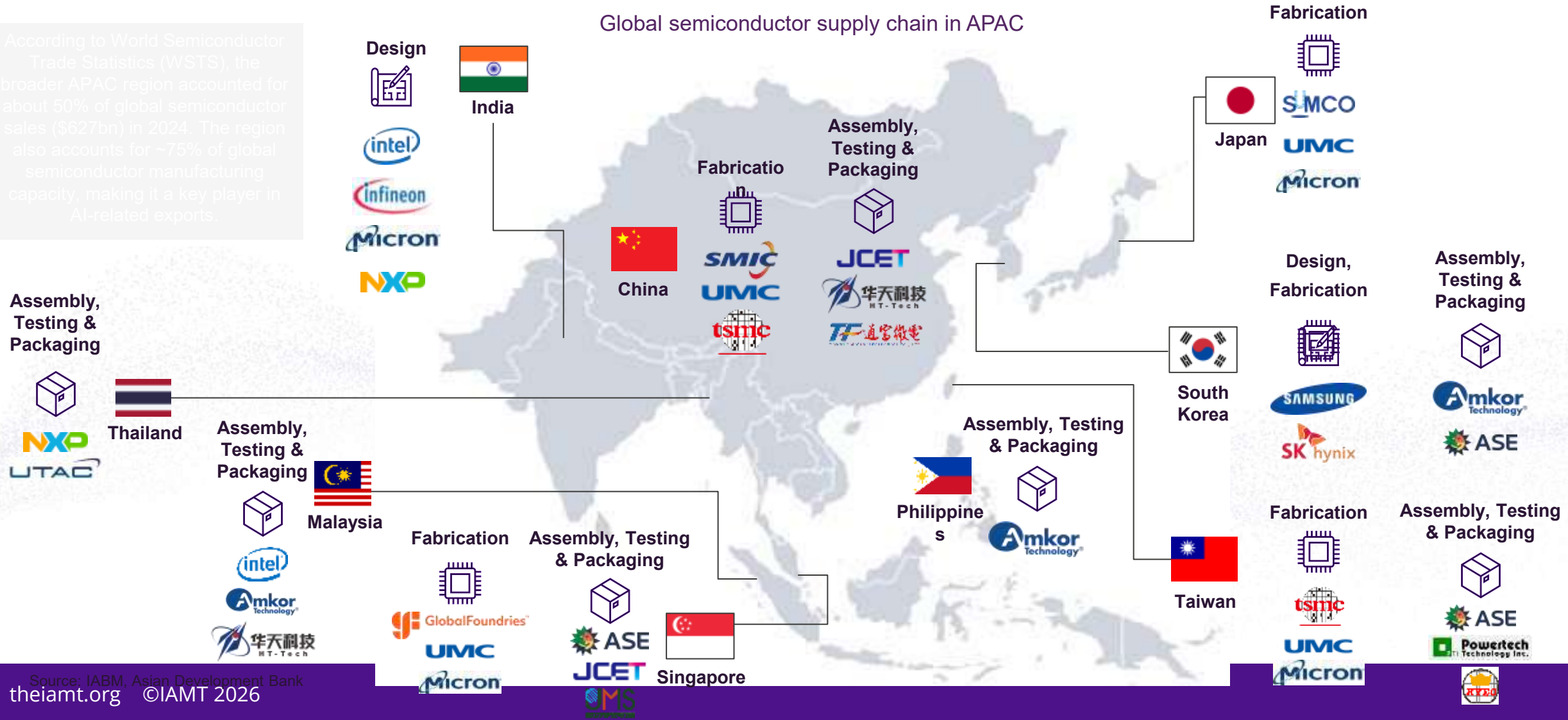
Asia-Pacific – MediaTech Investment



APAC dominates global semiconductor manufacturing, making it a central player in the AI race

According to World Semiconductor Trade Statistics (WSTS), the broader APAC region accounted for about 50% of global semiconductor sales (\$627bn) in 2024. The region also accounts for ~75% of global semiconductor manufacturing capacity, making it a key player in AI-related exports.

Global semiconductor supply chain in APAC

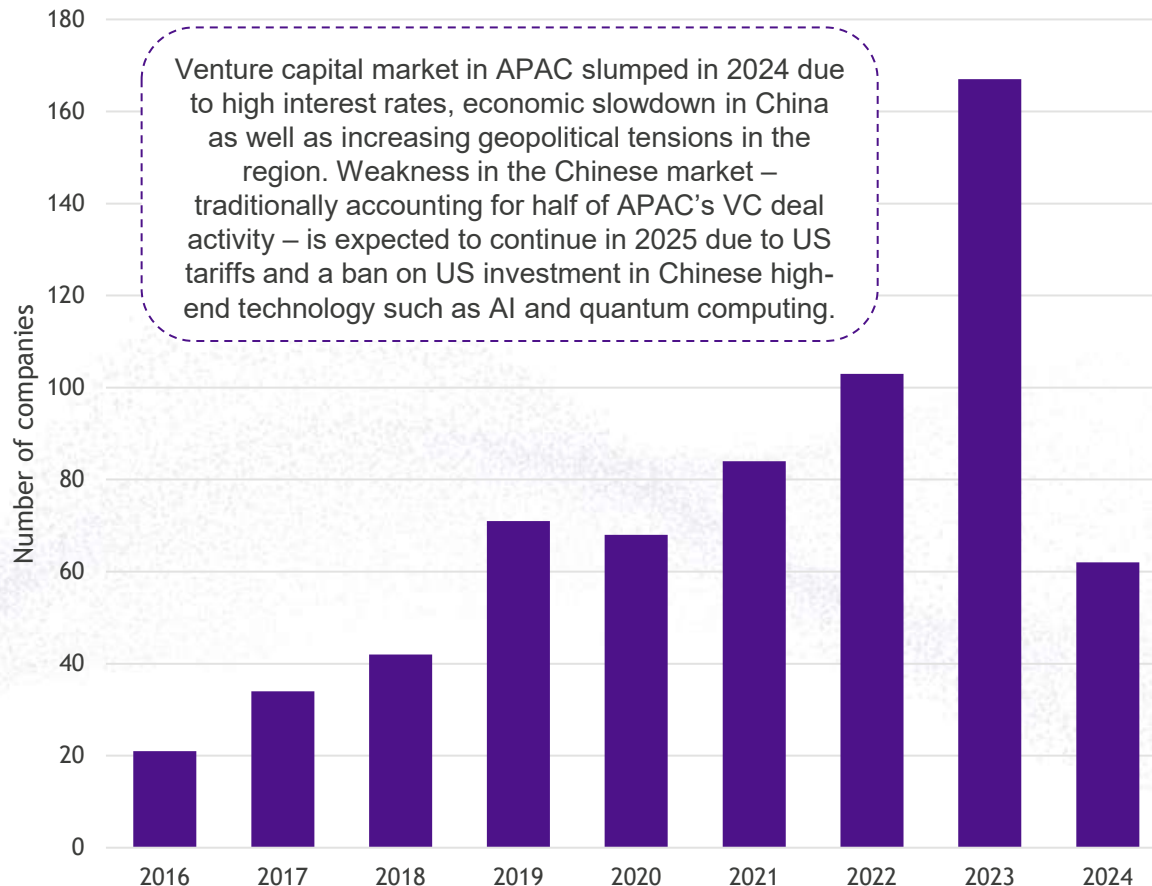


Asia-Pacific – MediaTech Investment



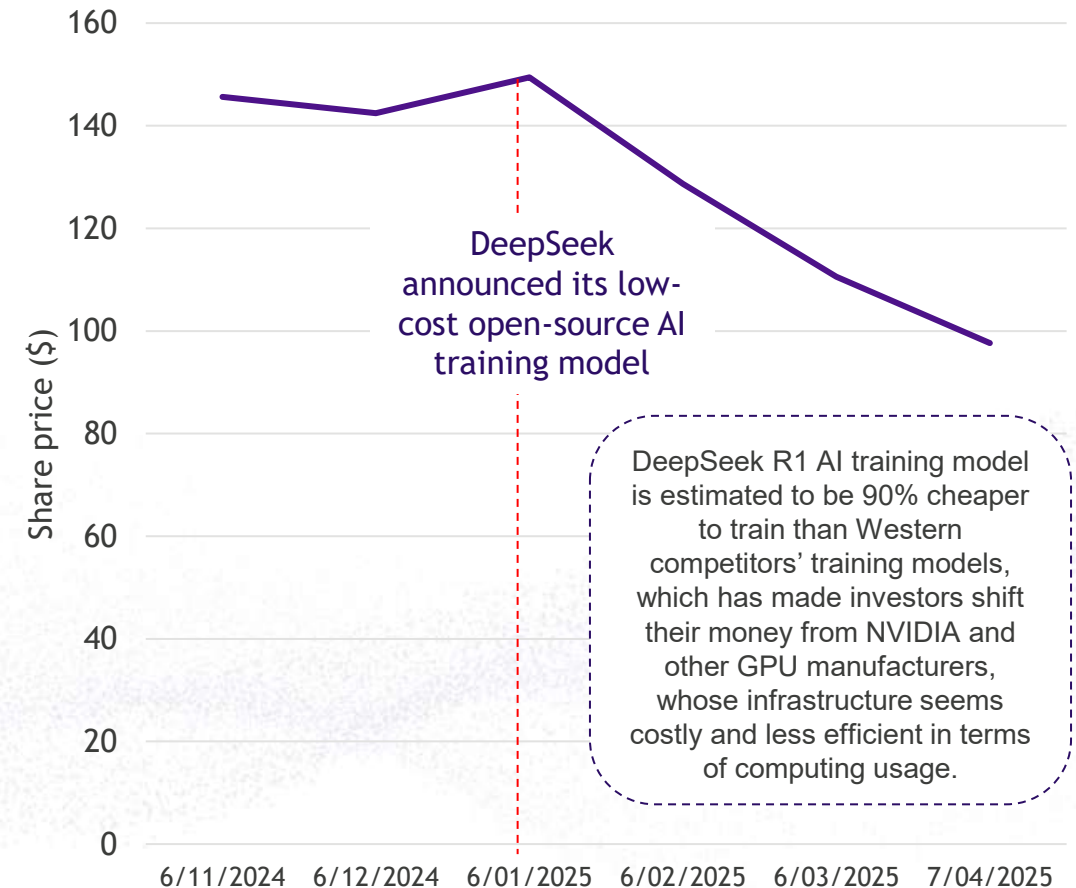
Tariffs, geopolitical tensions and the launch of DeepSeek are impacting investment in AI

New AI startups founded in M&E industry in APAC



Venture capital market in APAC slumped in 2024 due to high interest rates, economic slowdown in China as well as increasing geopolitical tensions in the region. Weakness in the Chinese market – traditionally accounting for half of APAC's VC deal activity – is expected to continue in 2025 due to US tariffs and a ban on US investment in Chinese high-end technology such as AI and quantum computing.

NVIDIA share price (Nov 2024 - Apr 2025)



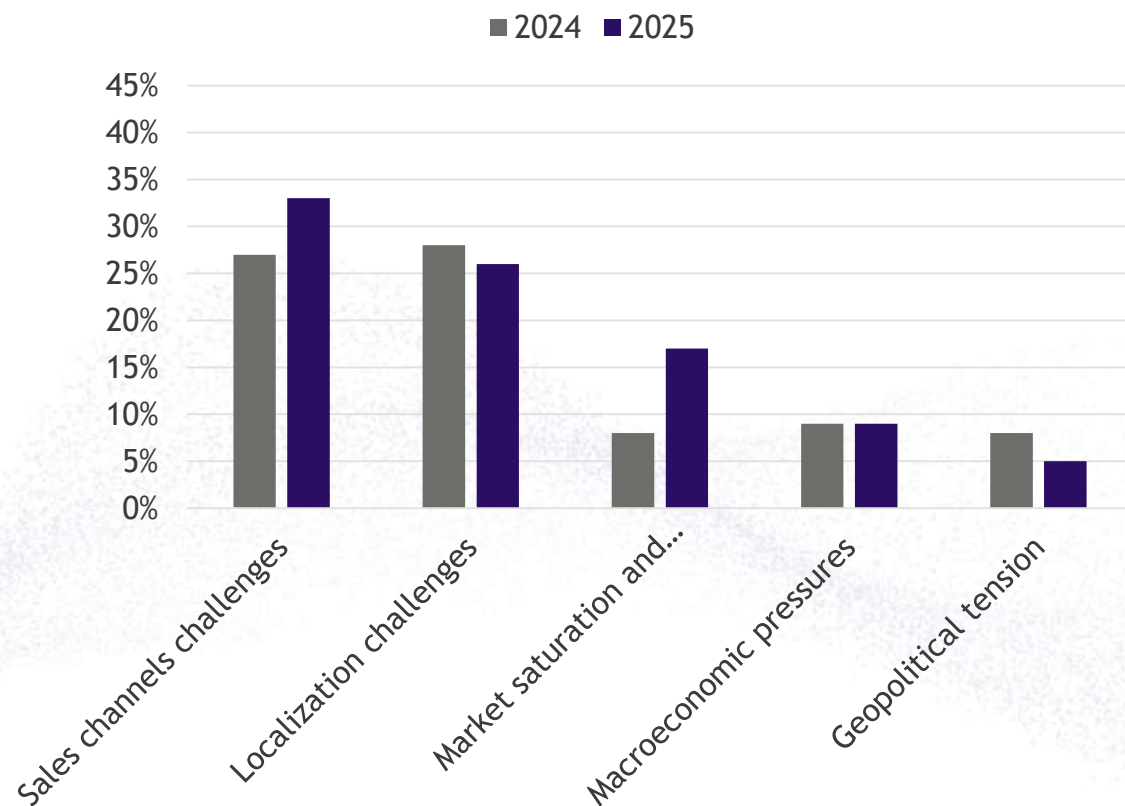
DeepSeek announced its low-cost open-source AI training model

DeepSeek R1 AI training model is estimated to be 90% cheaper to train than Western competitors' training models, which has made investors shift their money from NVIDIA and other GPU manufacturers, whose infrastructure seems costly and less efficient in terms of computing usage.

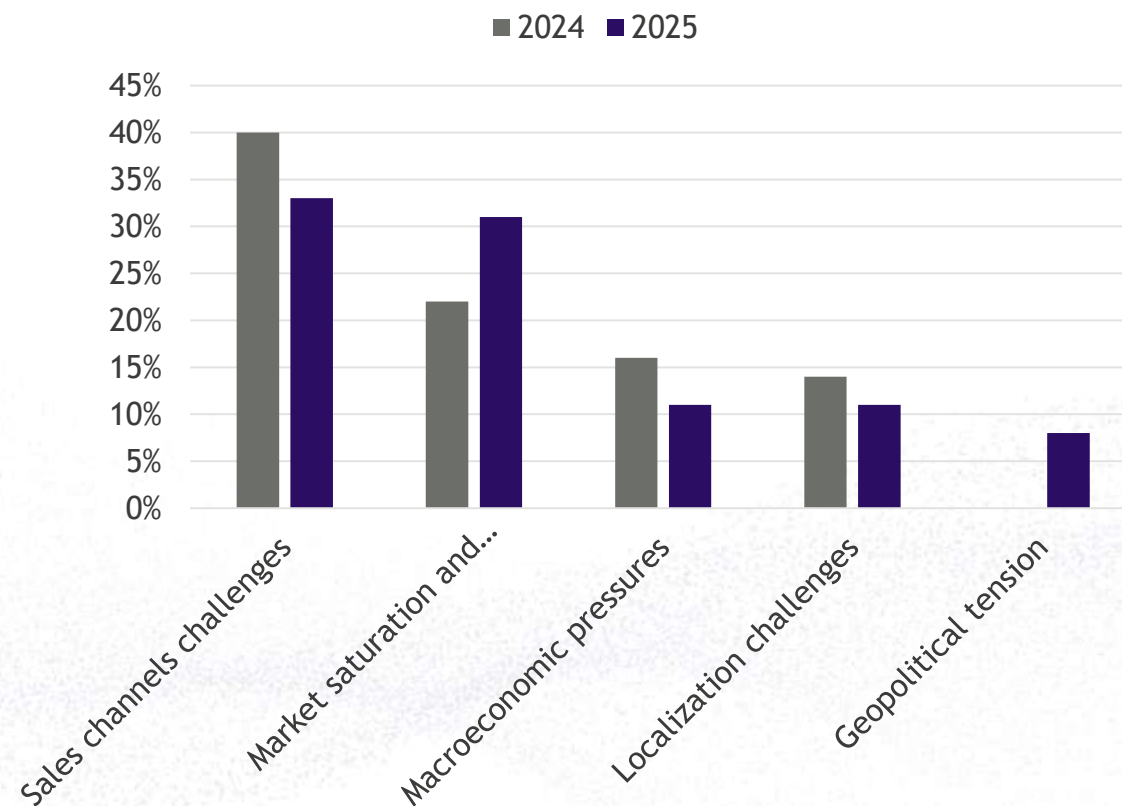
Asia-Pacific – Challenges

APAC markets face growing saturation and experience sales channel difficulties

Top 5 regional barriers to growth in Asia



Top 5 regional barriers to growth in Australasia



Q. What is the major regional barrier to the growth of your business in each of the regions where your company operates? (All industry, Asia 2024 n=64, 2025 n=58; Australasia 2024 n=50, 2025 n=36)

Source: IAMT

Asia-Pacific – Challenges

Tariffs are increasing supply chain risks and price pressure on top of high cloud storage costs



Technology supplier in a NewscastStudio interview (January 13th 2025)

*Most broadcast equipment manufacturers rely heavily on components from overseas so **tariffs** on imported goods will increase the final product **price**. Major broadcast industry players are already expressing concerns that their **existing multi-year contracts** with their customers will **prohibit** them from buying equipment at **higher prices**. These pressures will cause pressure on all industry manufacturers and diminish already **thin margins** across the supply chain.*

Suzana Brady
SVP of Global sales and Marketing
Cobalt Digital
(January 2025)

GEP Insight
Technology buyer in an IABM interview

***Storage technology and cloud access cost** are very **expensive**. Media data storage, access and retrieval, primarily for broadcast as well as for digital content – that’s a big challenge. **Versioning** is also a big challenge, because the same show – if you are creating for Netflix – you should be able to play it on a big 80-inch screen, 4K TV as well as on 5-inch mobile screen. So, technologywise, I think the challenge stems from **variety of content** that needs to be **stored and finished**. **Piracy** is somewhat of a problem, too.*

MediaTech buyer
Asia-Pacific
(February 2025)



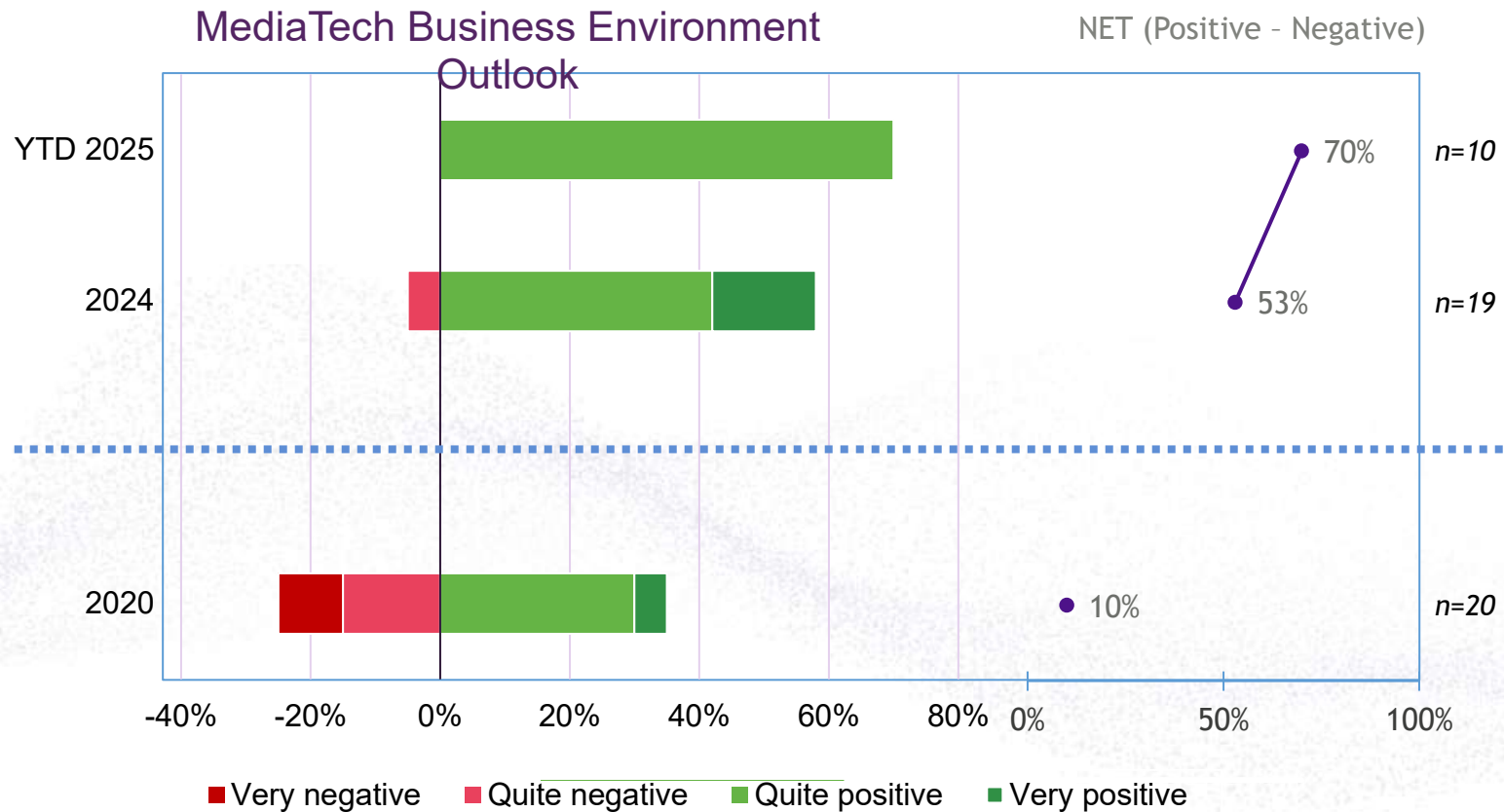
GeoAnalysis – Latin America

Connect. Support. Inform.
theiabm.org

Environment



The business environment outlook in Latin America improved relative to 2024



Business Confidence

In Latin America, confidence improved relative to 2024, with no negative expectations for the year ahead. Economies in Latin America are recovering from the shocks of previous years, caused by the peaks in inflation and living costs due to the war in Ukraine. Growth prospects remain moderate, but positive, despite uncertainties related to recent US trade policies and tariffs.

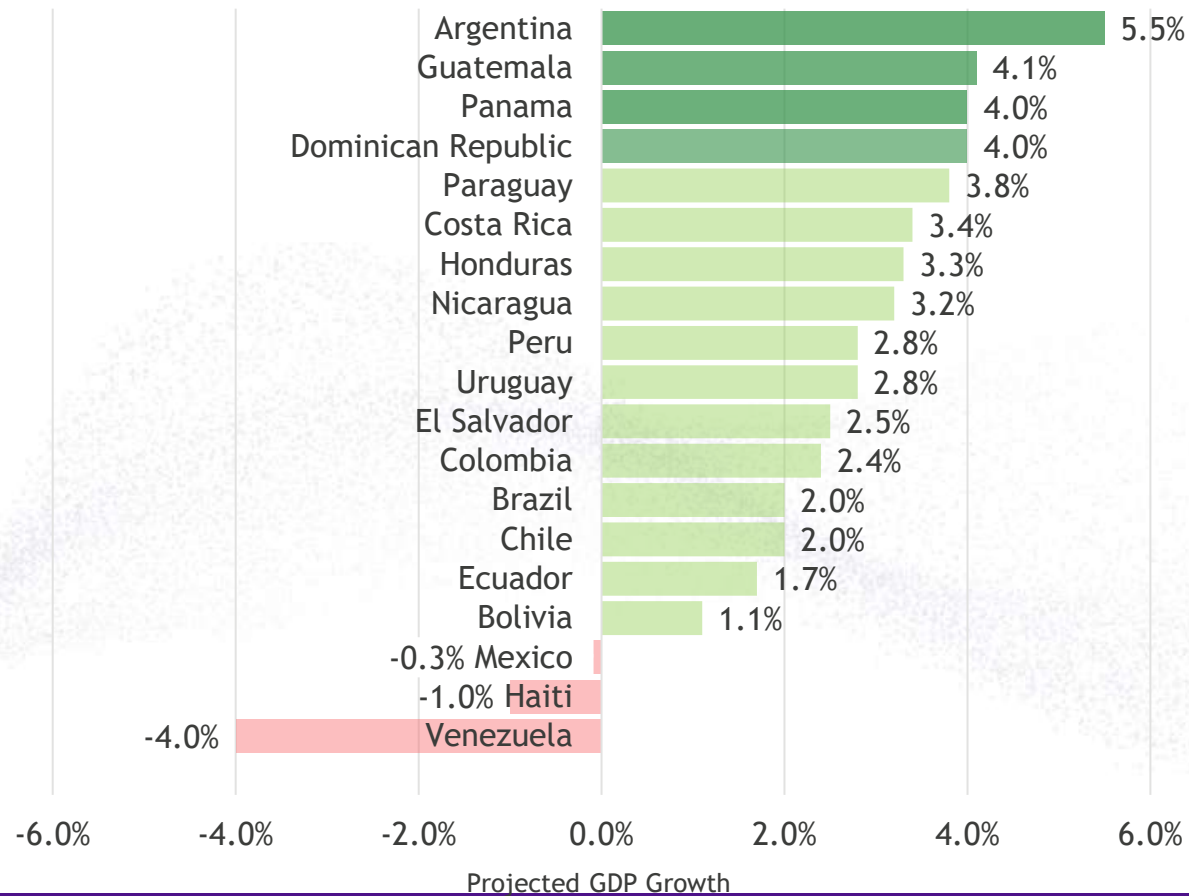
Q. What is your organization's outlook for the overall business environment over the next year? (Latin America)

* The sample size is insufficient to show historical data between 2020 and 2024

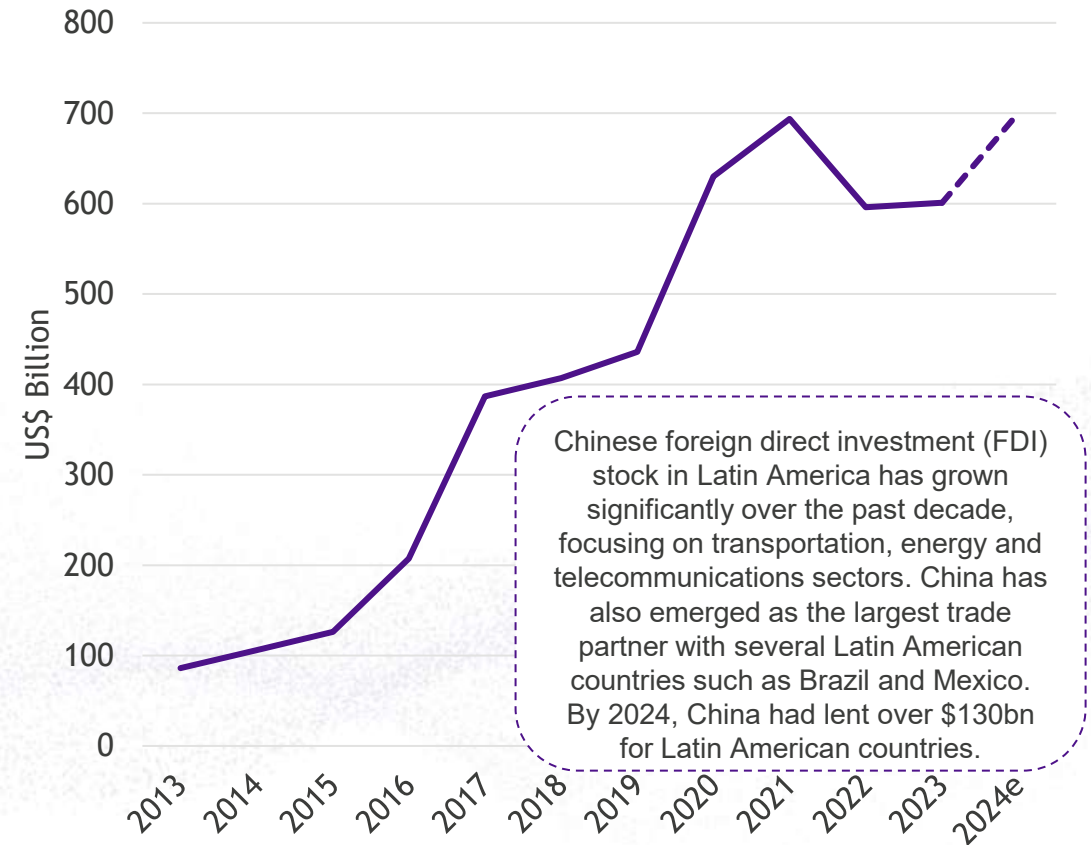
Latin America – Business Environment

Latin American economies are expected to grow in 2025, boosted by Chinese FDI

Real GDP growth in Latin America by country in 2025 - Projection (as of April 2025)



Chinese' FDI in Latin America



FTA satellite TV has a strong hold in the region due to free programming and premium sports

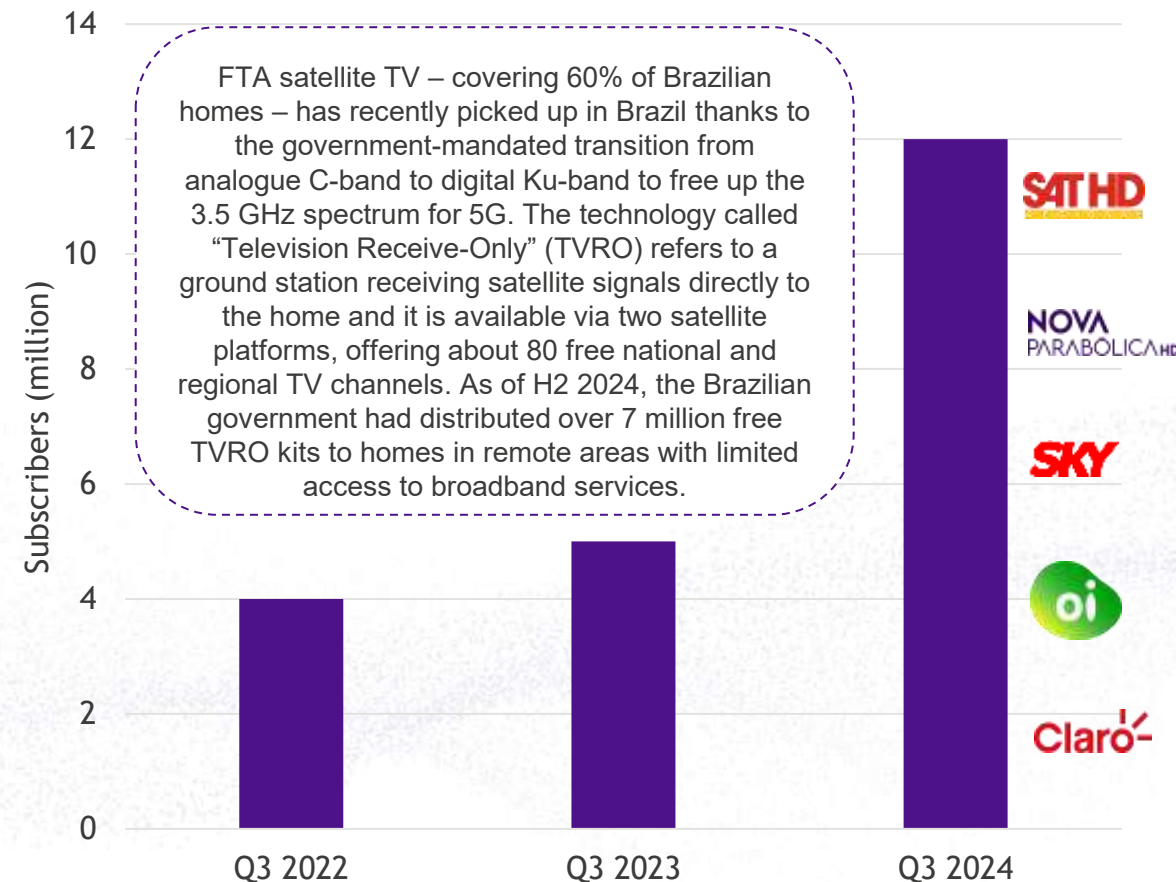
GEP Insight

Technology buyer in an IABM interview

*Right now we have a big problem in our [linear TV] market in Brazil, because it's shifting to digital. However, **free TV** broadcasting in Brazil is really **powerful** up to now. We have a viewership of around **45-50 million** Brazilian people watching our channels every day. Brazil is a very poor country, so people don't want to pay or they don't have the money to pay for a subscription. That's why Pay-TV in Brazil is not a success. Streaming services are very limited too. [...] This market is based on the **free TV** and the **ad support**, because it's there to entertain and inform people **free of charge**.*

MediaTech buyer
Latin America
(February 2025)

Total DTH FTA bouquets in Brazil by quarter



FTA satellite TV – covering 60% of Brazilian homes – has recently picked up in Brazil thanks to the government-mandated transition from analogue C-band to digital Ku-band to free up the 3.5 GHz spectrum for 5G. The technology called “Television Receive-Only” (TVRO) refers to a ground station receiving satellite signals directly to the home and it is available via two satellite platforms, offering about 80 free national and regional TV channels. As of H2 2024, the Brazilian government had distributed over 7 million free TVRO kits to homes in remote areas with limited access to broadband services.

DTH FTA bouquet totals represent quarterly subscriber totals for the following selected providers: SAT HD, Nova Parabolica HD, Sky Oi, Claro

Latin America – Business Environment



Brazil launches trials of TV 3.0 broadcasts, ahead of the FIFA World Cup in 2026

MediaTech supplier in an IABM interview

- The first broadcast using the Brazilian Next-Gen TV standard TV 3.0 – known as ATSC 3.0 in the US – was launched in late April by Globo, which rolled out a pilot DTV+ broadcast in Rio de Janeiro for the testing of new content, technology and architecture. The commercial launch of DTV+ is targeted for the 2026 FIFA World Cup taking place in Sao Paulo, Brazil. DTV+ app provides features such as personalized audio, real-time statistics, multi-view camera options, instant replays and interactive polls.
- Next-Gen TV 3.0 in Brazil is expected to significantly improve broadcasters' targeted advertising capabilities, enabling them to include small and medium-sized advertisers into the TV ecosystem to drive digital ad revenue.
- The up-coming FIFA World Cup is accelerating the adoption of TV 3.0, because many Brazilians are buying new TV sets – featuring TV 3.0 – before the World Cup. The new standard is going to be made available in STBs, which viewers can connect through HDMI to the TV or to have an internal antenna to receive the signal in broadcast, enabling the viewer to connect an STB to the Internet to receive broadcast and broadband services in the same equipment.
- The Brazilian TV 3.0 standard is also enabling viewers to take advantage of 4K and HDR, MPEG-H and Dolby Atmos, inducing more content production in 4K, which is currently very limited in terms of supply.

*We are very much in touch with what's happening in **Brazil** on their evolution to **TV 3.0**, which is going to give you a more **interactive experience** on the **over the air side** of things. It is to really combat [the] streaming side. That's where all that data really is coming from. We've worked with Globo in all the **Globo trials** going on. They've been incorporating our **live encoder software**, which then **wraps** in the **different players** that are front as far as the audio side up into our own product.*

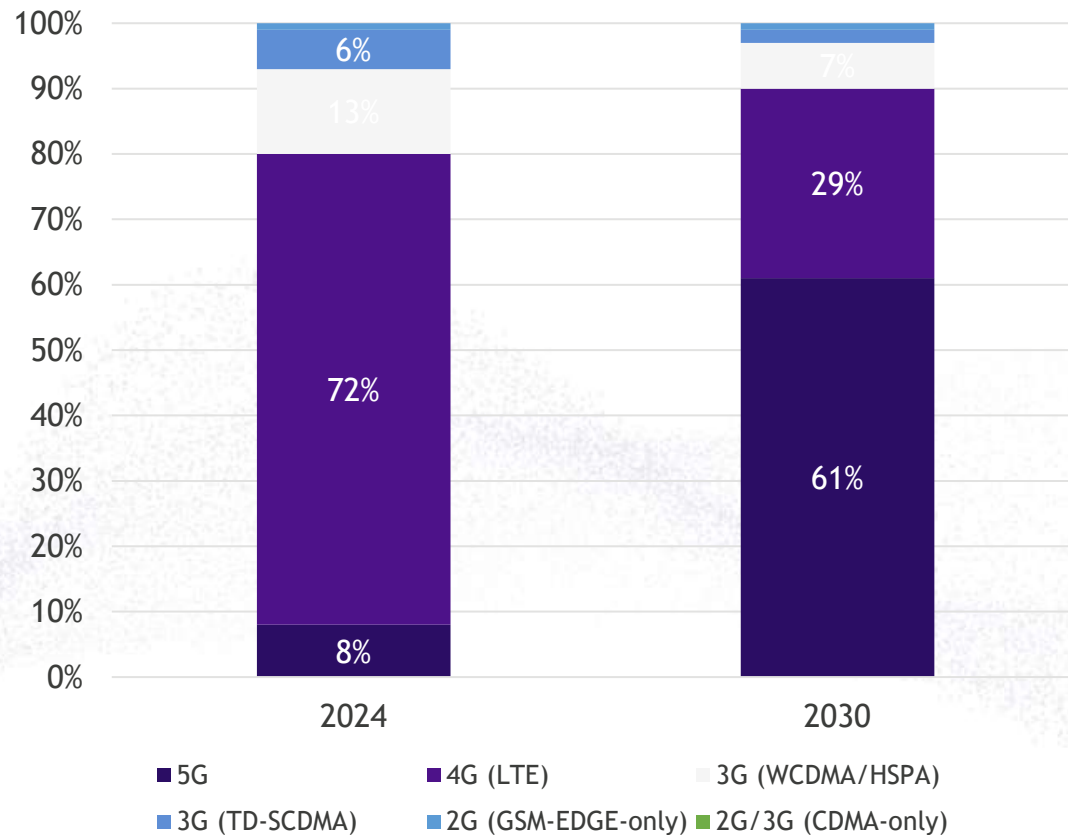
MediaTech supplier
North America
(February 2025)

Latin America – Business Transformation

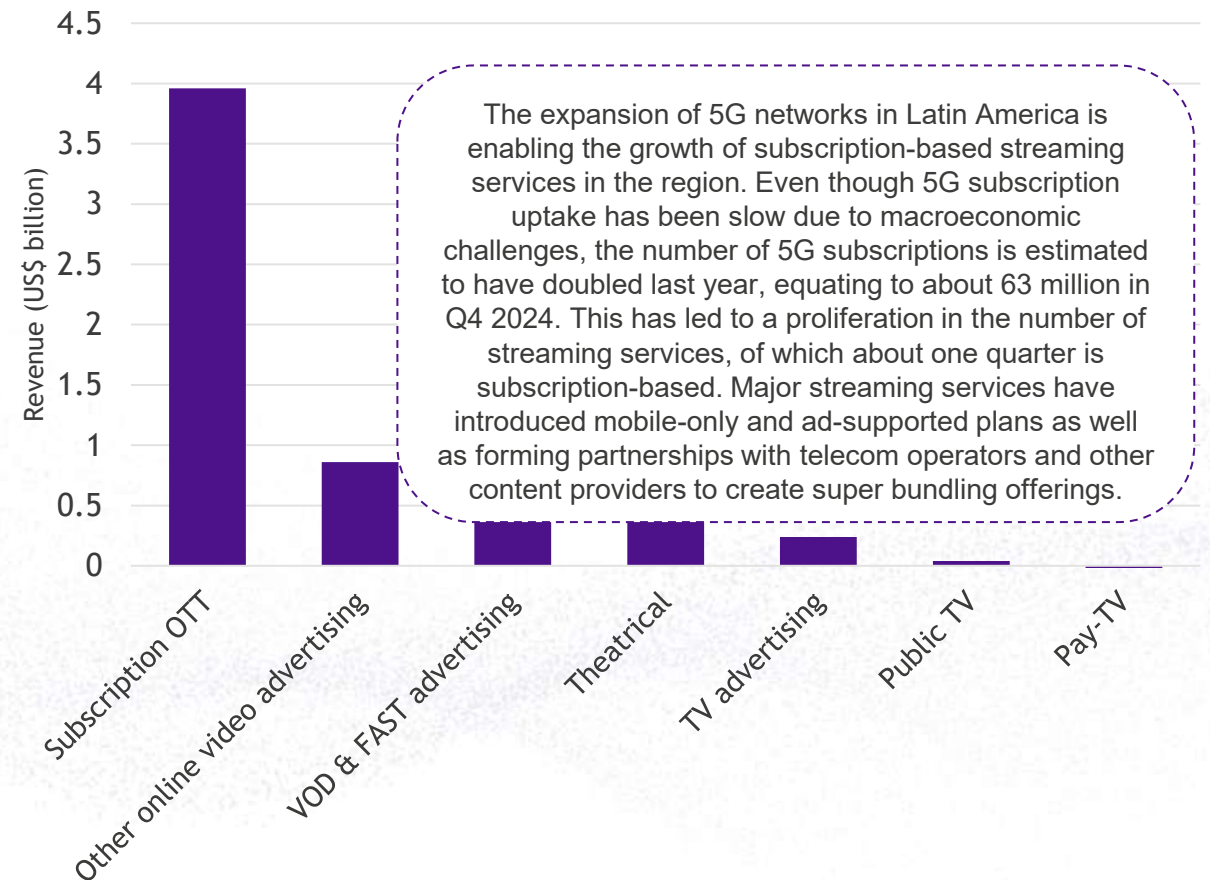


Telecom partnerships are facilitating the growth of mobile-only and ad-supported streaming plans

Mobile subscriptions by technology in Latin America



Revenue growth in Latin America by video sector (2024-2029)



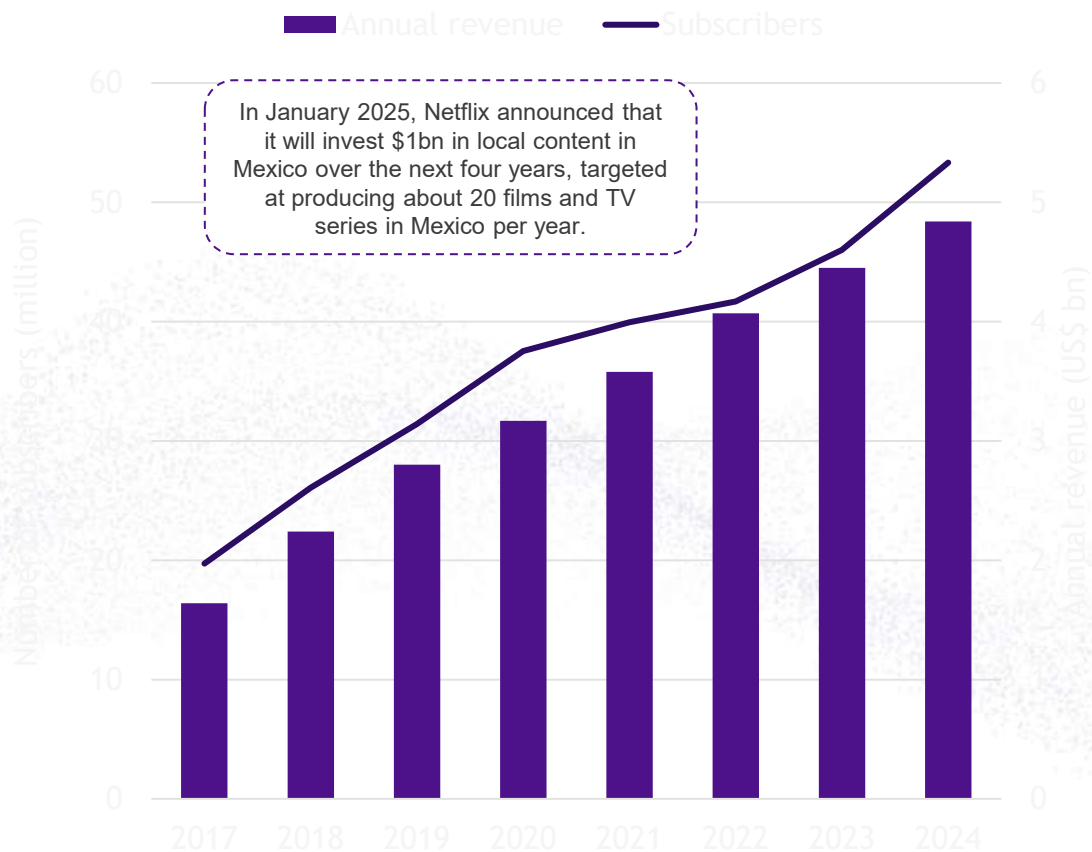
The expansion of 5G networks in Latin America is enabling the growth of subscription-based streaming services in the region. Even though 5G subscription uptake has been slow due to macroeconomic challenges, the number of 5G subscriptions is estimated to have doubled last year, equating to about 63 million in Q4 2024. This has led to a proliferation in the number of streaming services, of which about one quarter is subscription-based. Major streaming services have introduced mobile-only and ad-supported plans as well as forming partnerships with telecom operators and other content providers to create super bundling offerings.

Latin America – Business Transformation **iamt**

Major streaming services are investing in local content, driving the adoption of AI

Netflix's annual revenue and paid plan subscribers in Latin America

Netflix Q1 2025 earnings call – April 17th 2025



Today, you can use these **AI-powered** tools to enable **smaller budget projects** to have access to **big VFX** on screen. A recent example – Rodrigo Prieto was the DP on *The Irishman* just five years ago. We were using very cutting edge, very expensive de-aging technology that still had massive limitations, still created a bunch of complexity on set for the actors. This year, Rodrigo is directing his first feature film for us, **Pedro Paramo** in Mexico. Using **AI-powered tools**, he was able to deliver this **de-aging VFX** to the screen for a **fraction** of what is **cost** on *The Irishman*. In fact, the entire budget of the film was about the VFX costs of the *Irishman*.

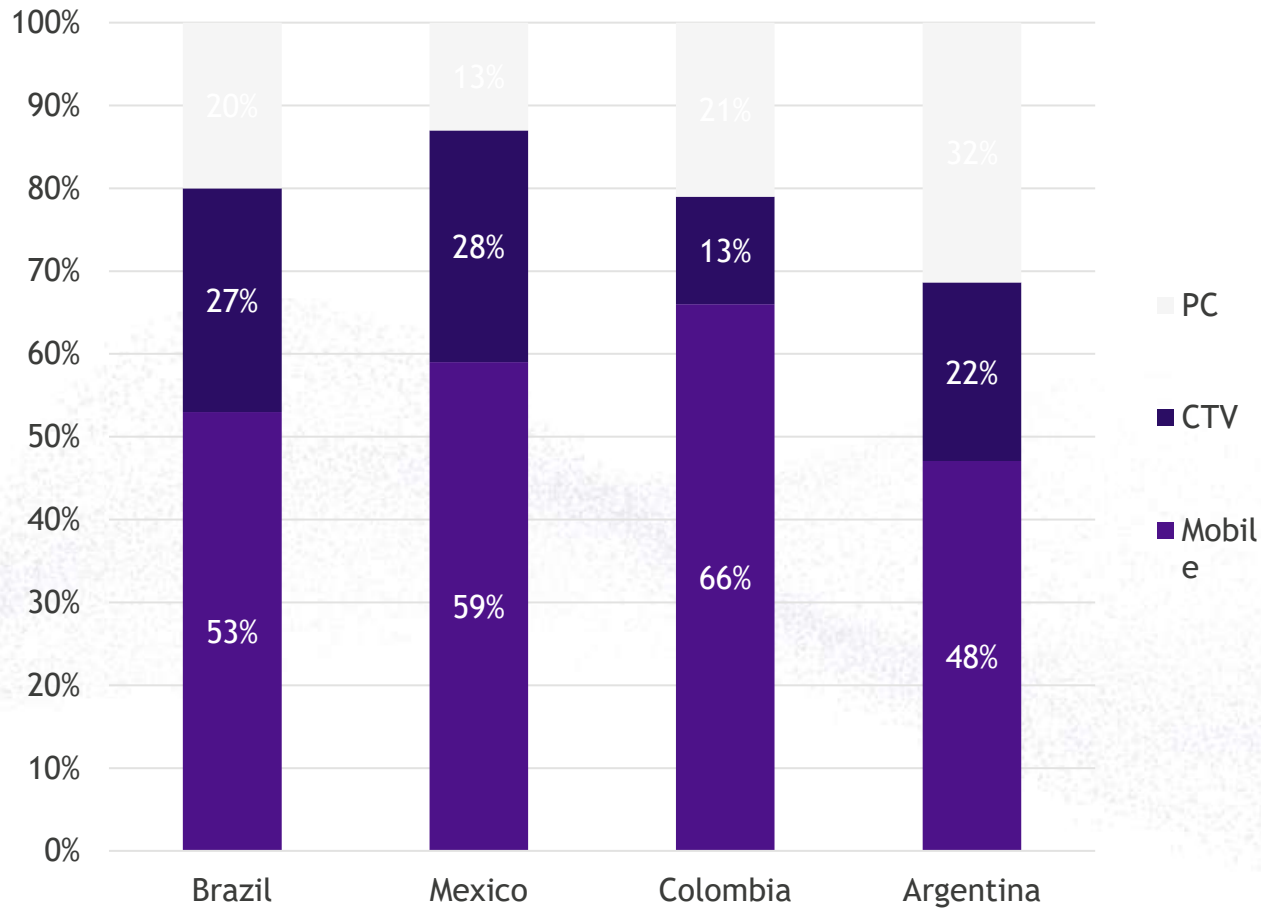
Ted Sarandos
CEO at Netflix
(April 2025)

Latin America – Business Transformation



Mobile-first content is essential to engage predominantly young populations

Preferred platforms for video viewing in Latin America



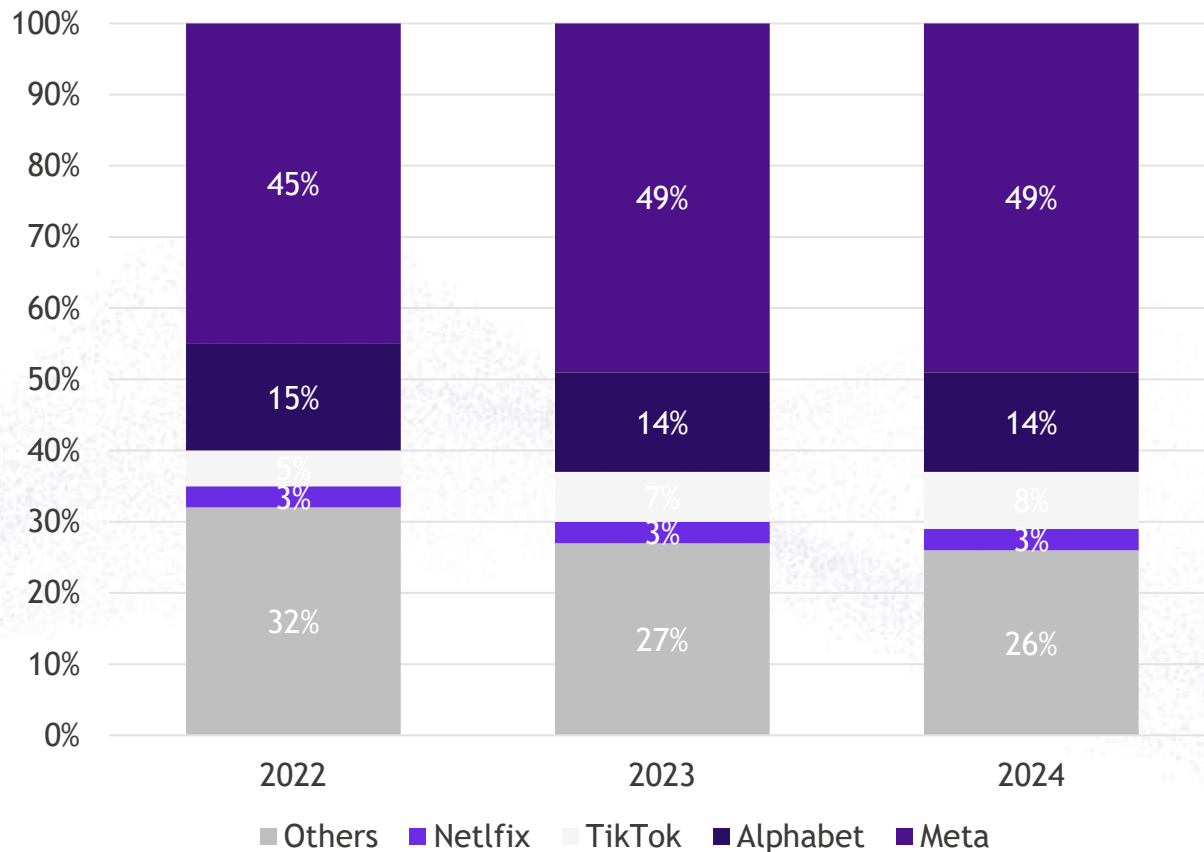
Median age in Latin America (2025)



Latin America – Business Transformation **iamt**

Social media platforms already account for the majority of all download traffic in the region

Download traffic by traffic-generating company 2022-2024



TikTok Latin America news release - February 6th 2025

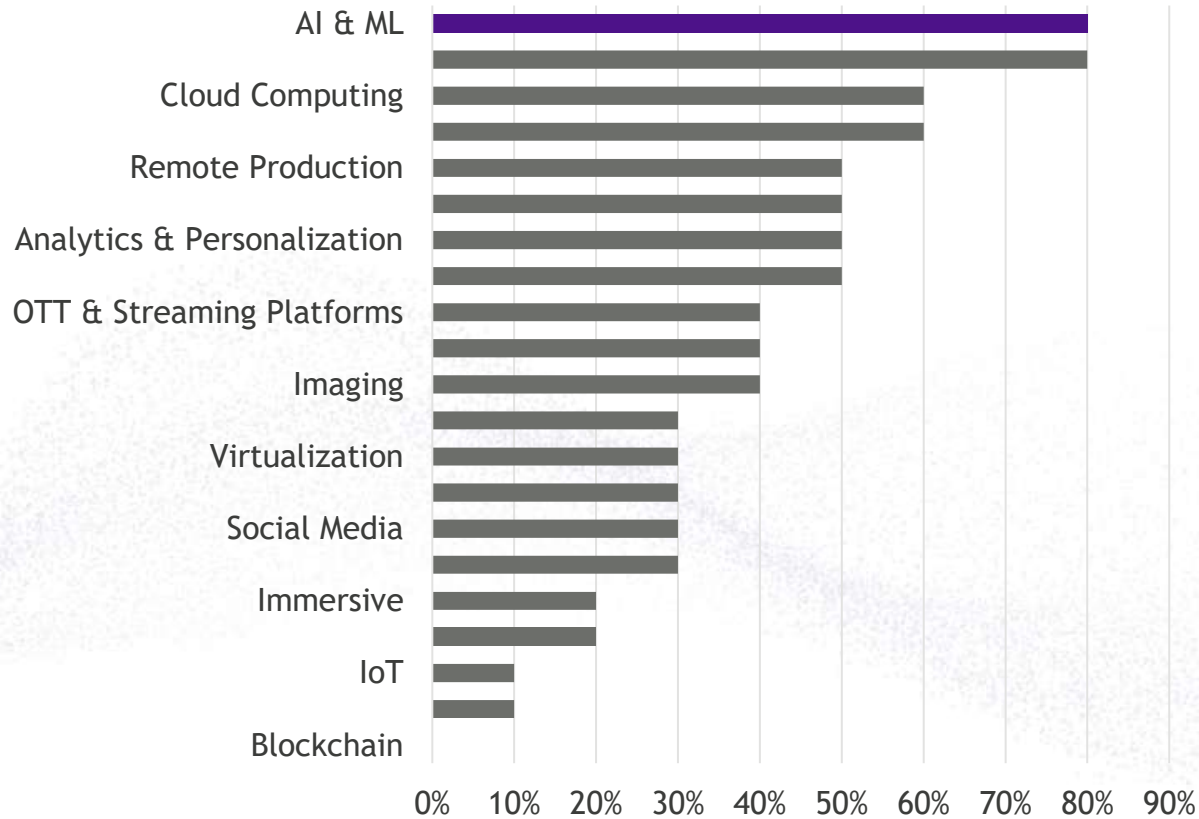
*Today, we are thrilled to announce a new way to connect **users and local businesses** with **in-stream TikTok Shop**, which opens now its doors in **Mexico**, being the first country in Latin America to launch this innovative shopping experience. [...] Through **live broadcasts and videos with links to purchase**, sellers can transform their digital presence, connecting with users in **real time, in stream**.*

TikTok
Latin America
(February 2025)

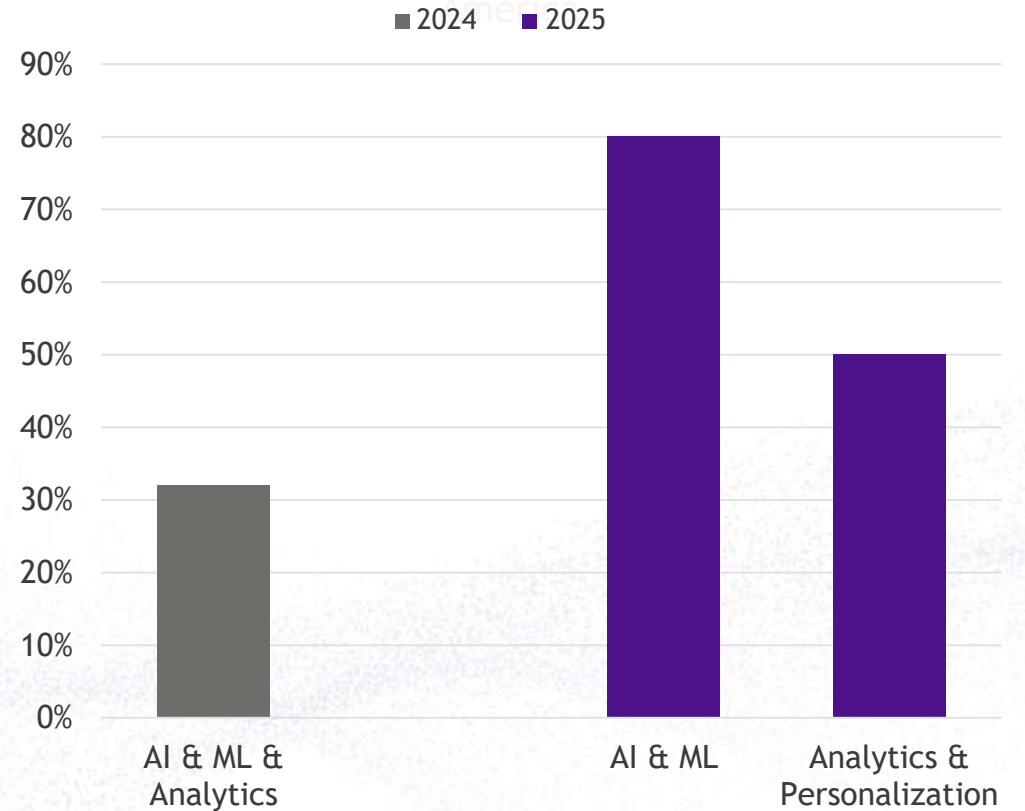
Latin America – MediaTech Investment

Latin America has emerged as a key AI market, with notable growth in technology roadmaps

Trends in Technology Roadmap: Latin America



AI & ML in Technology Roadmaps in Latin America



Q. What are the most important trends in your organization's technology roadmap? (All industry, 2025, n=24)

Q. What are the most important trends in your organization's technology roadmap? (All industry, 2024 n=19; 2025 n=10)

The adoption of TV 3.0, CTV and ad-supported streaming are driving demand for ad tech



Brazil's Strategy with TV 3.0

Brazil is pioneering the adoption of TV 3.0, a next-generation broadcasting standard that integrates over-the-air transmission with internet capabilities. This hybrid approach enables features like 4K and 8K resolution, immersive audio, interactive applications, and targeted advertising. The government has committed over BRL 90 million (€15 million) to accelerate this development, aiming to enhance viewer experience and open new avenues for monetization.



Role of Connected TV (CTV) & AVOD in Reaching Large Audiences

Connected TV usage is on the rise in Brazil, with 50% of the online population identifying as "CTV Watchers" and 63% watching CTV daily. This shift has paved the way for Ad-Supported Video on Demand (AVOD) models to flourish, offering free content to viewers in exchange for advertisements. Such models are particularly effective in reaching large audiences, especially in regions where subscription-based services may be less accessible.



Importance of Ad-Supported Models in Low-Income Regions

In economically challenged areas, ad-supported models are crucial for content accessibility. As one industry expert noted, "We target low-income homes with ads, but we need better bitrate to deliver quality." Ensuring high-quality streaming in these regions requires investment in infrastructure to support higher bitrates, thereby improving the viewing experience and effectiveness of advertising.



Globo's Affiliate & Satellite Network: Bridging the Amazon Region

Globo, Brazil's largest broadcaster, leverages its extensive affiliate and satellite network to deliver content across the Amazon region. Through partnerships with networks like Rede Amazônica, Globo ensures that even the most remote areas have access to its programming. This distribution strategy is vital for reaching audiences in the Amazon, where traditional infrastructure may be lacking.

Media businesses in the region are investing in virtual production, Cloud, AI and mobile OTT

AI for Content Discovery & Creation

•**What:** Latin American broadcasters and sports media organizations are increasingly integrating AI for content personalization, automated editing, and real-time analytics. The Mexican Soccer Federation is using seeUplay® AI to boost player data analytics and fan immersion

•**Why It Matters:** AI improves viewer retention by tailoring recommendations, enhances production efficiency through automation, and creates interactive second-screen experiences—key for OTT and CTV growth.

Strategic Impact: Suppliers of AI-driven recommendation engines and synthetic production tools are in growing demand across OTT and sports broadcasting ecosystems.

Hybrid Workflows

•**What:** LATAM broadcasters are adopting hybrid cloud workflows, balancing latency-sensitive on-prem systems with cloud for scalability and collaboration. Latin America’s cloud services market is forecast to reach USD 55.21 billion by 2025, at a CAGR of 15.45%.

•**Why It Matters:** Cloud enables remote editing, automated archiving, and faster delivery pipelines—crucial in a region with growing OTT demand and constrained on-site resources.

Strategic Impact: Tech vendors must address latency and UX gaps for live broadcasting while offering modular, interoperable cloud tools.

Virtual Technologies

•**What:** While still nascent, synthetic media and AR/VR activations are being tested for immersive sports coverage and branded experiences. Several broadcasters are exploring AI avatars for commentary and AR overlays during sports broadcasts; NFTs remain experimental but are used for limited-edition fan collectibles.

•**Why It Matters:** These tools enable hyper-personalization, second-screen interactivity, and new monetization models—especially around live events.

Strategic Impact: Offers new creative canvases and monetization levers. MediaTech suppliers should watch for scalable, compliant deployment models.

Mobile Screen / Vertical View

•**What:** Mobile remains the dominant screen for Gen Z and Millennial users across LATAM—especially for short-form, live content, and social video. TikTok, WhatsApp, and YouTube dominate video consumption patterns.

•**Why It Matters:** Media workflows should be adapted to support the creation and distribution of vertical video and advertisements to deliver mobile-first experiences.

•**Strategic Impact:** Buyers and sellers must tailor UX, compression, and monetization models to mobile environments with 5G boosting reliability.

GEP Insight

MediaTech buyer in an IABM interview

*For the last Olympics, we established a **virtual production studio**, which earned us recognition from the IOC and the NY Film Festival as one of the most innovative studios for the **Paris Olympics**. We created a virtual studio within the Eiffel Tower using advanced virtual production techniques, achieving significant success in Brazil.*

*This approach allowed us to save substantial **costs** by reducing the number of **personnel** sent to Paris from 800 to approximately 50. The commentators, presenters, and the majority of our team **operated remotely** from Brazil, producing content as if they were on-site. This innovative strategy proved highly effective, and we are considering implementing a similar approach for the **FIFA World Cup** next year.*

MediaTech buyer
Latin America
(February 2025)

Latin America – MediaTech Investment

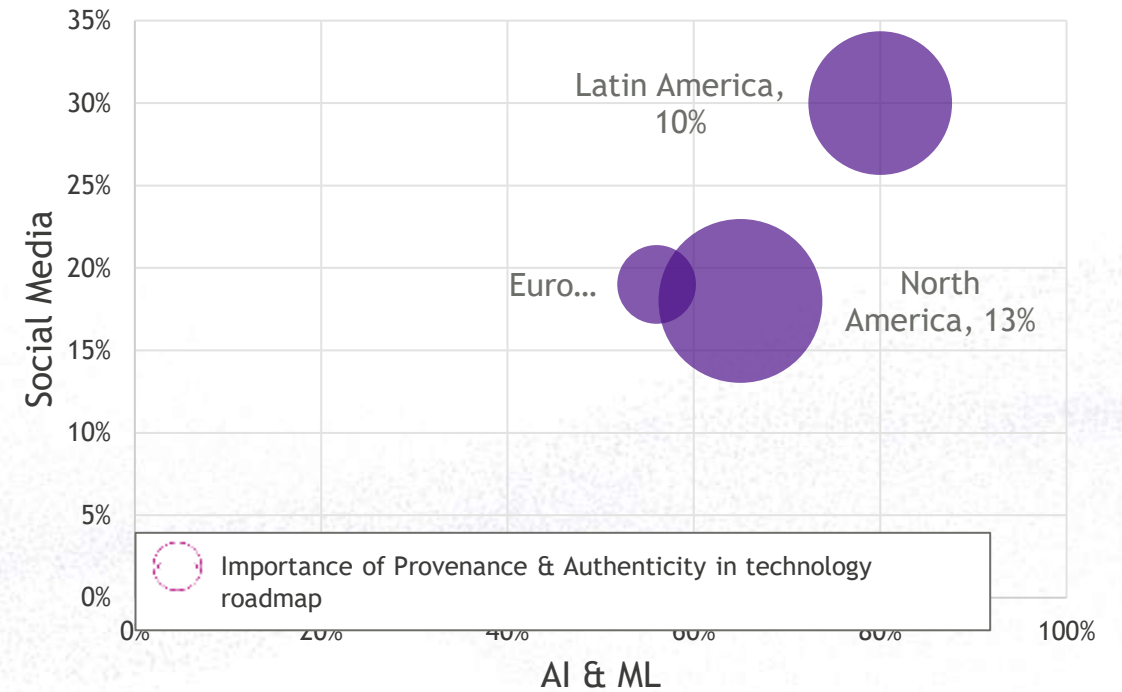
Investment in provenance has emerged in the Americas with the rise of Generative AI

MediaTech Buyer in a LatAm Journalism Review interview

***Audio** is our **biggest** point of **concern**, because for images, both videos and photos, we already have some very developed [AI] support technology for identification. In the case of audio, it is practically forensic work, which I consider to be a little beyond what we, as journalists and fact-checkers, have the **skills** and **tools** to deal with at the moment.*

Natalia Leal
CEO
Agencia Lupa Media
Brazil
(August 2024)

In America's technology roadmaps, the importance of provenance and authenticity correlates with AI's position as a top priority and the significance of social media.



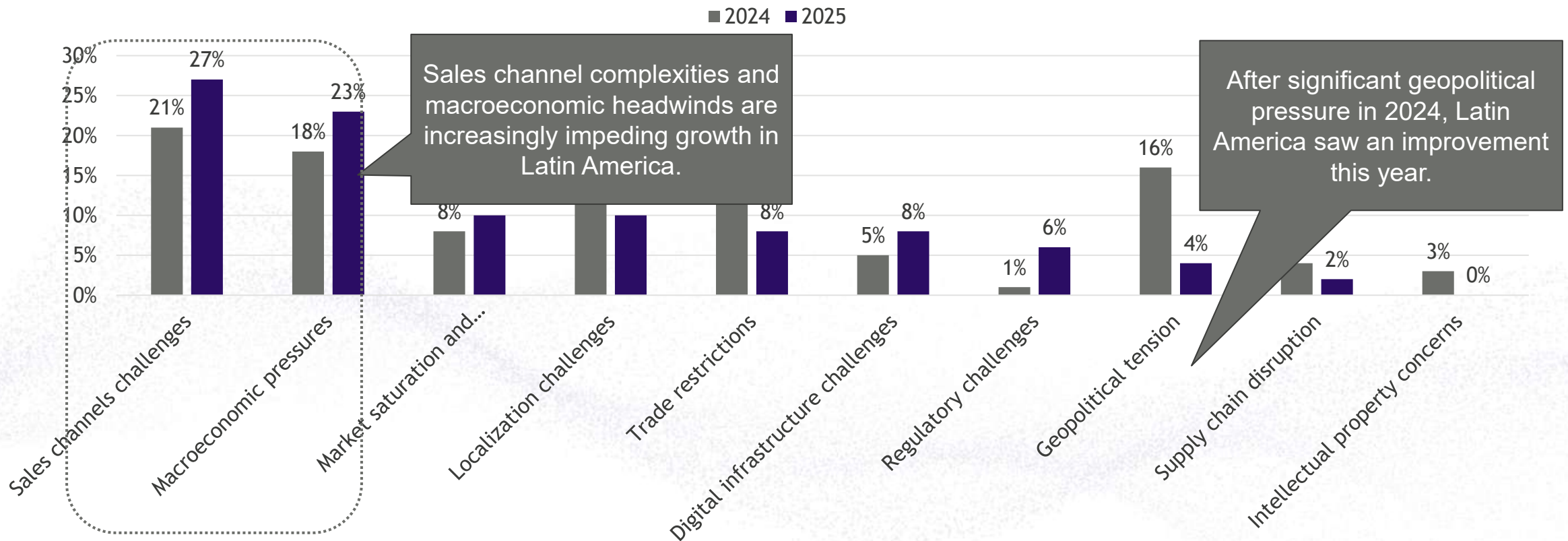
Q. What are the most important trends in your organization's technology roadmap? (All industry, February-March 2025)

Latin America – Regional Challenges



Sales channel challenges and macro headwinds are hindering Latin American growth

Regional barriers to growth in Latin America



Q. What is the major regional barrier to the growth of your business in each of the regions where your company operates? (All industry, 2024 n=77, 2025 n=48)

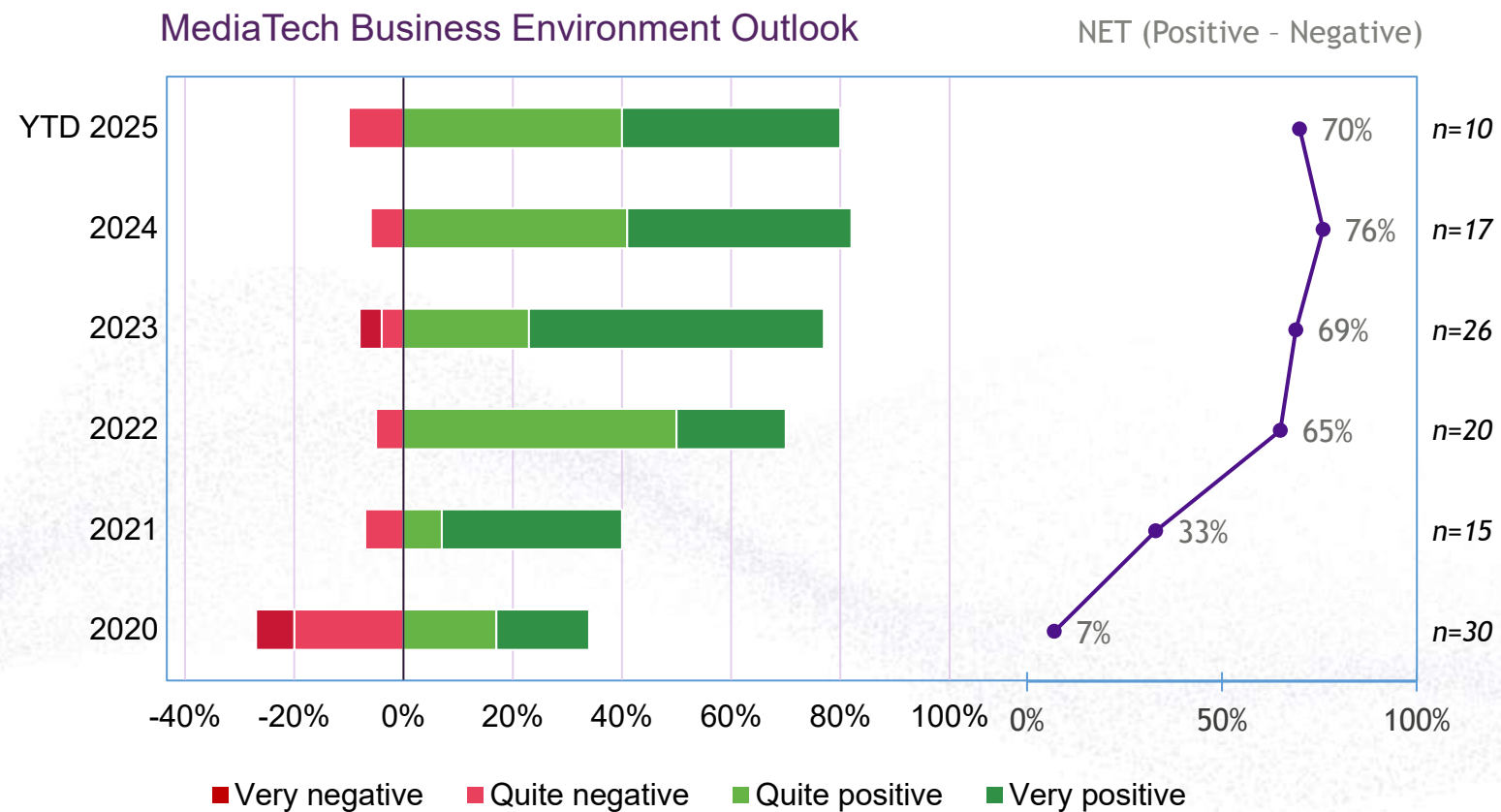
GeoAnalysis – Middle East & Africa



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MEA – Business Environment

Positive outlook in MEA remains stable, though NET decreases



Q. What is your organization's outlook for the overall business environment over the next year? (Middle East & Africa)

Business Confidence

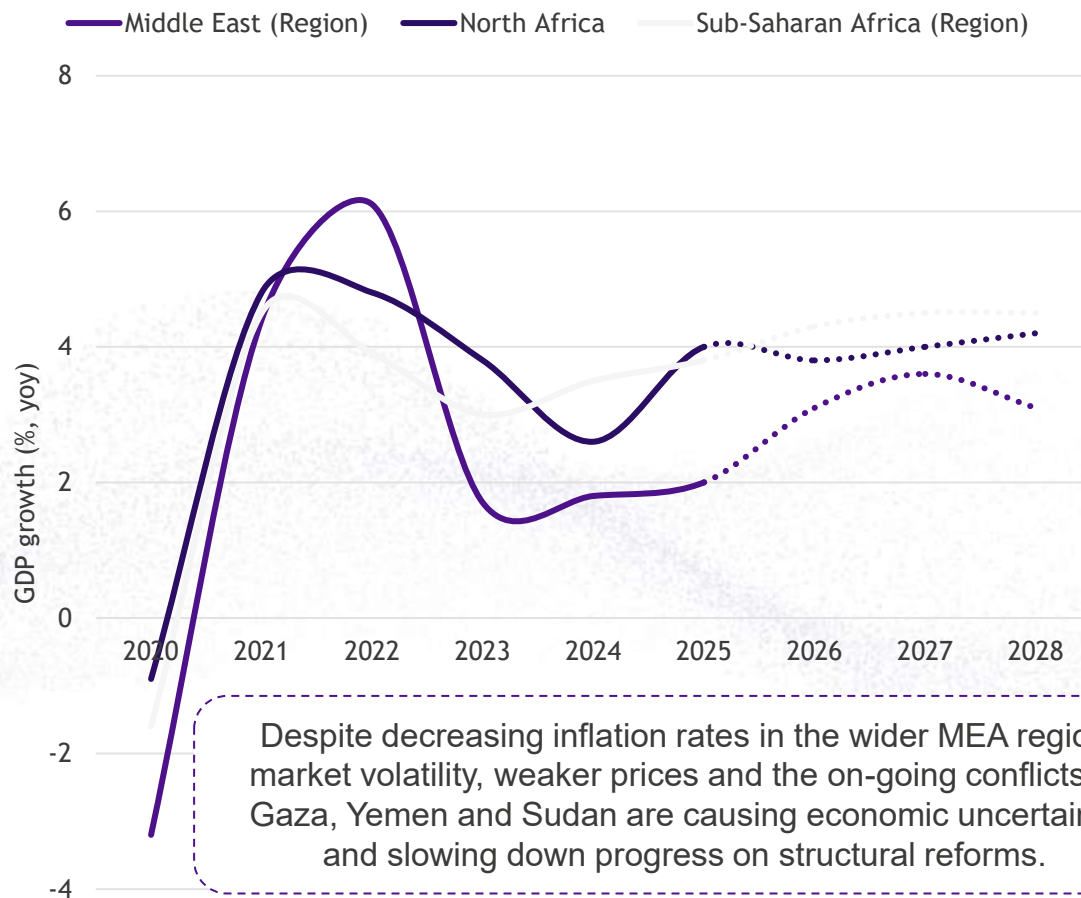
In the Middle East & Africa, the proportion of respondents with a positive outlook remained relatively stable at a cumulative total of 80%.

This optimism stems from the relatively stable financial situation of public service broadcasters and government-supported media companies in the Gulf countries. Recent major sporting events, like the FIFA World Cup, and the “opening up” of the Saudi Arabian market are translating into a relatively stable business sentiment.

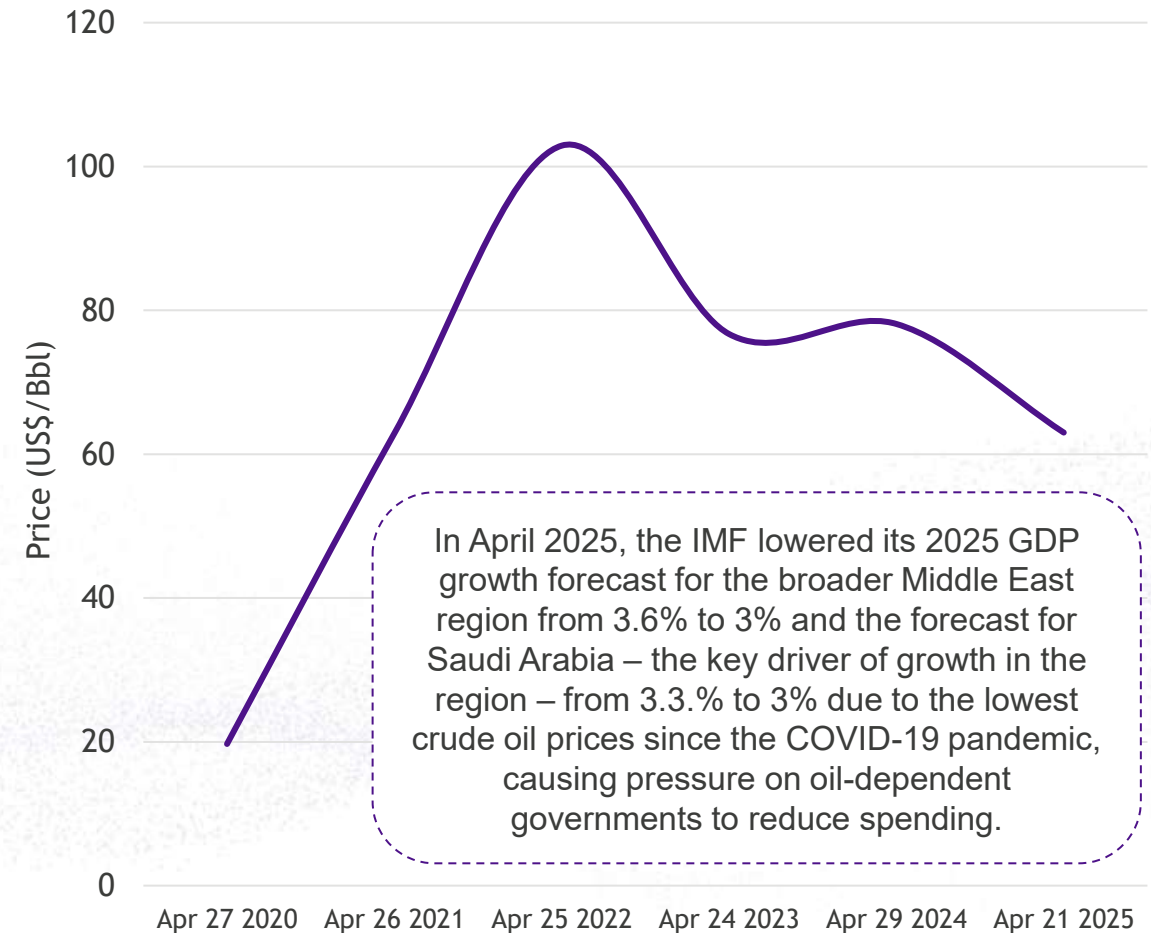
However, significant variation exists across sub-regions, particularly between countries in the Gulf Cooperation Council and Sub-Saharan Africa.

Economic growth is picking up, even though oil prices have dropped to lowest level since COVID

Real GDP growth by sub-region in MEA



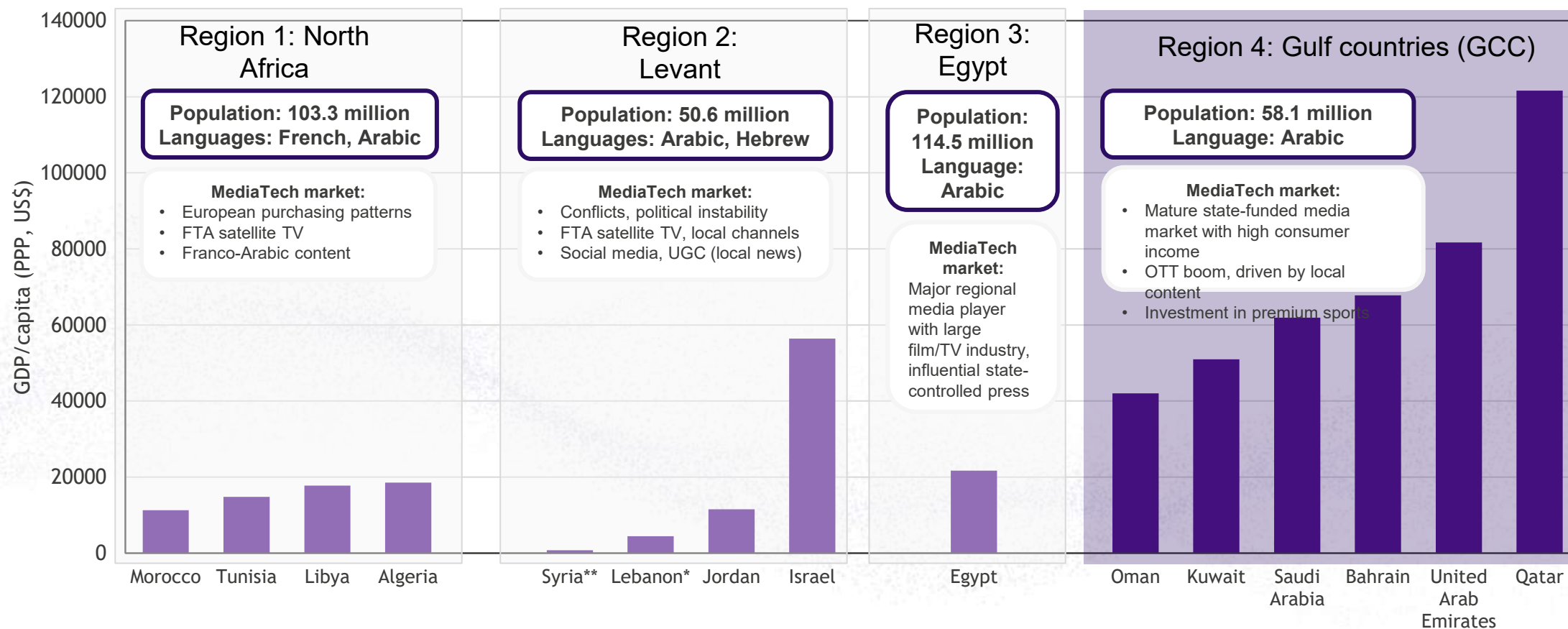
Crude oil WTI - Price 2020-2025



MENA – Business Environment

MENA region consists of several sub-regions and M&E markets with unique characteristics

MENA - GDP per capita, current prices (as of April 2025)



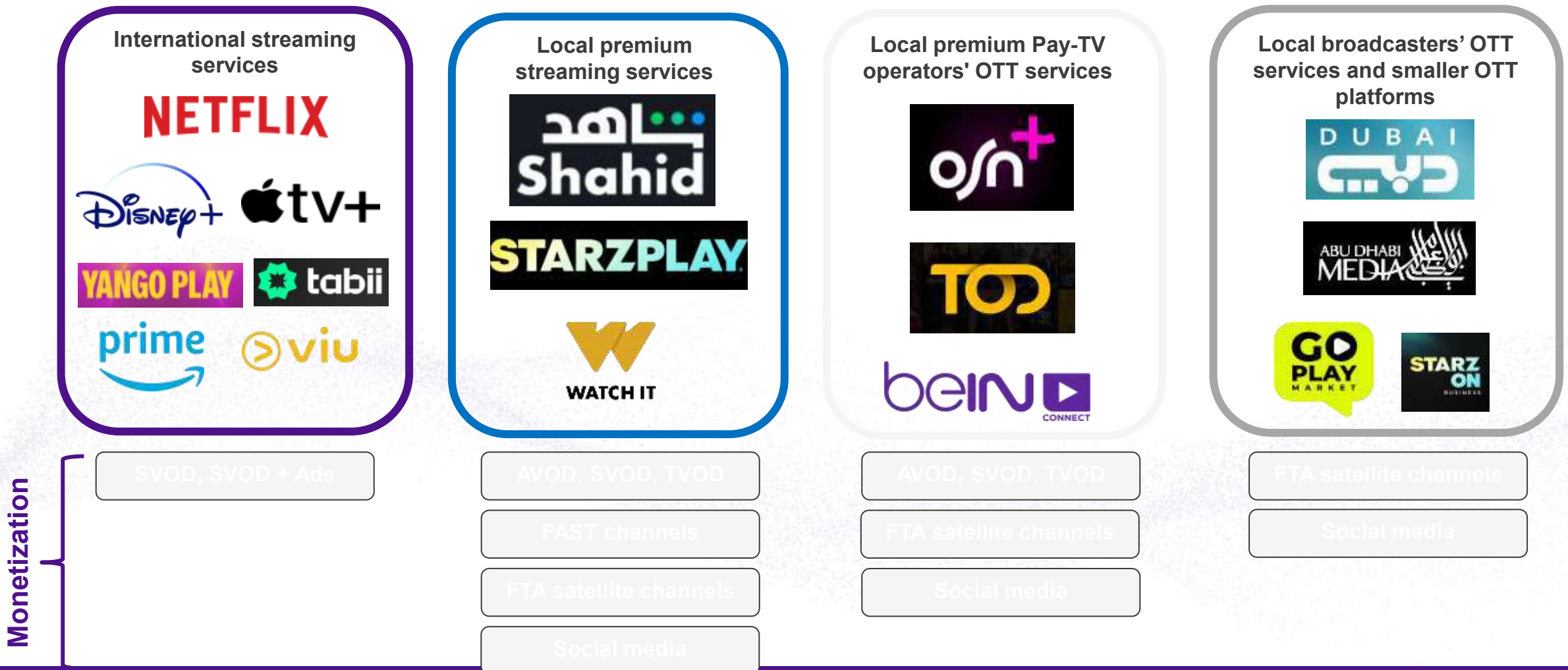
Reallocation of budgets to OTT and social media results in less for broadcast infrastructure

MediaTech supplier in an IABM interview

*In the **GCC countries**, which are richer and with a lot of development over the last years, OTT is the key trend. All media organizations – no matter commercial or non-commercial – are seeing this shift [in consumption] and are building **OTT networks, mobile apps** or becoming **aggregators**. [...] But there is generally **not much investment** in tech infrastructures. **Competition** in content for **digital platforms** and **social media** mean that now a part of customers' tech investment is going to other than physical infrastructure so that they have budget for these additional streams of expenses that they didn't have before like digital and social media. There is also this **OpEx investment limitation**, because government-funded organizations – so all major media companies – cannot push back due to **government budgeting structures** which are based on **year-by-year funding** allocations, rather than long-term or multi-year budgeting.*

Hasan R. Sayed Hasan
Managing Director
Master Media
(February 2025)

Competition in the OTT space is intensifying with new players entering the market

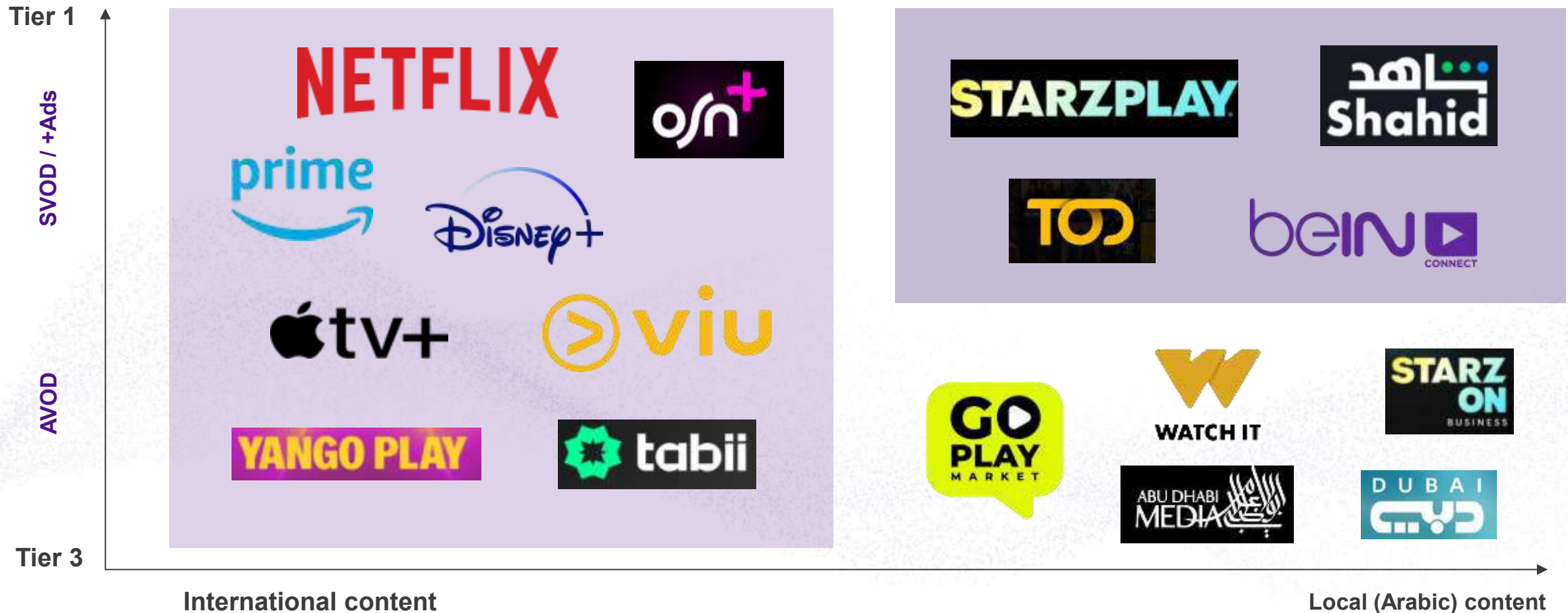


MENA – Business Transformation

Top local OTT platforms are combining VOD & Live sports to compete with social media

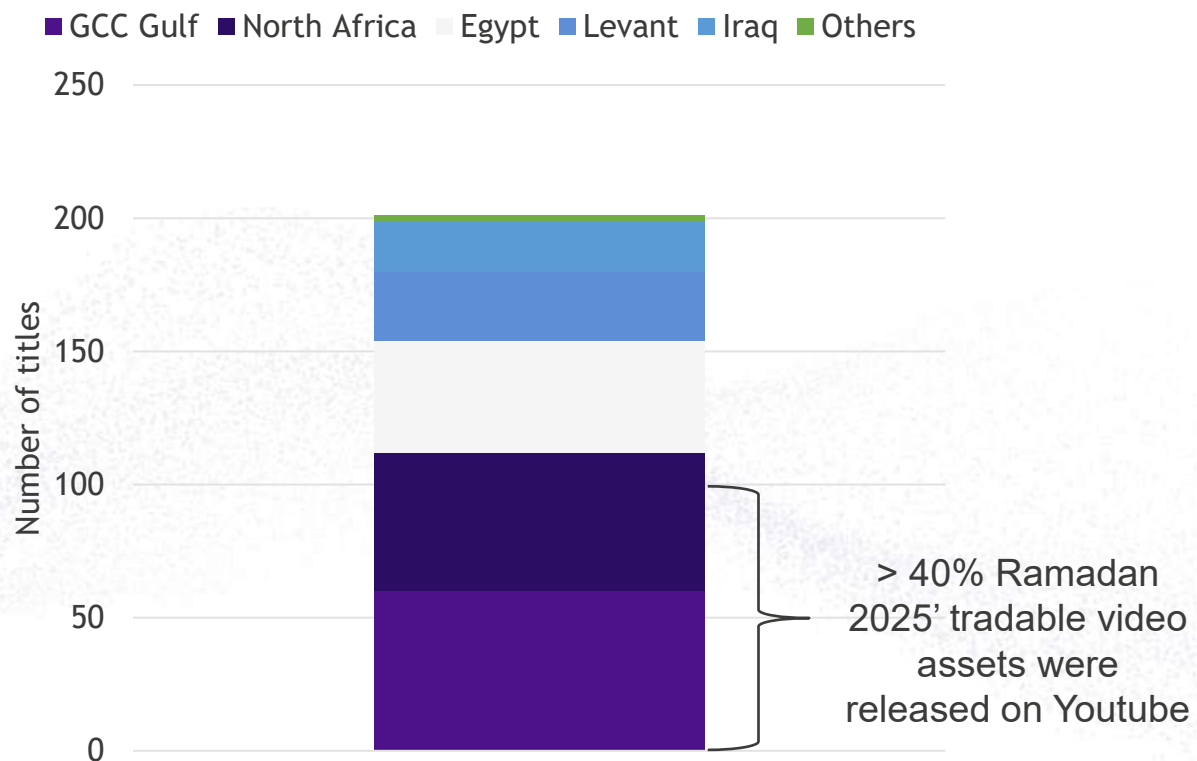
VOD

VOD & Live Sports



Social media is starting to dictate the form of entertainment, designed for digital platforms

Series released during Ramadan 2025



Industry expert in an BroadcastPro interview - April 27th 2025

TikTok is the new Ramadan drama arena. It has emerged as the ultimate engagement driver, creating organic virality for series that leverage its power. [...] This year also saw a spike in the rise of digital-first Ramadan content. Streaming platforms like Shahid, TOD, Watchit, Viu and Yango Play are no longer just alternatives to TV, they are shaping Ramadan drama consumption.

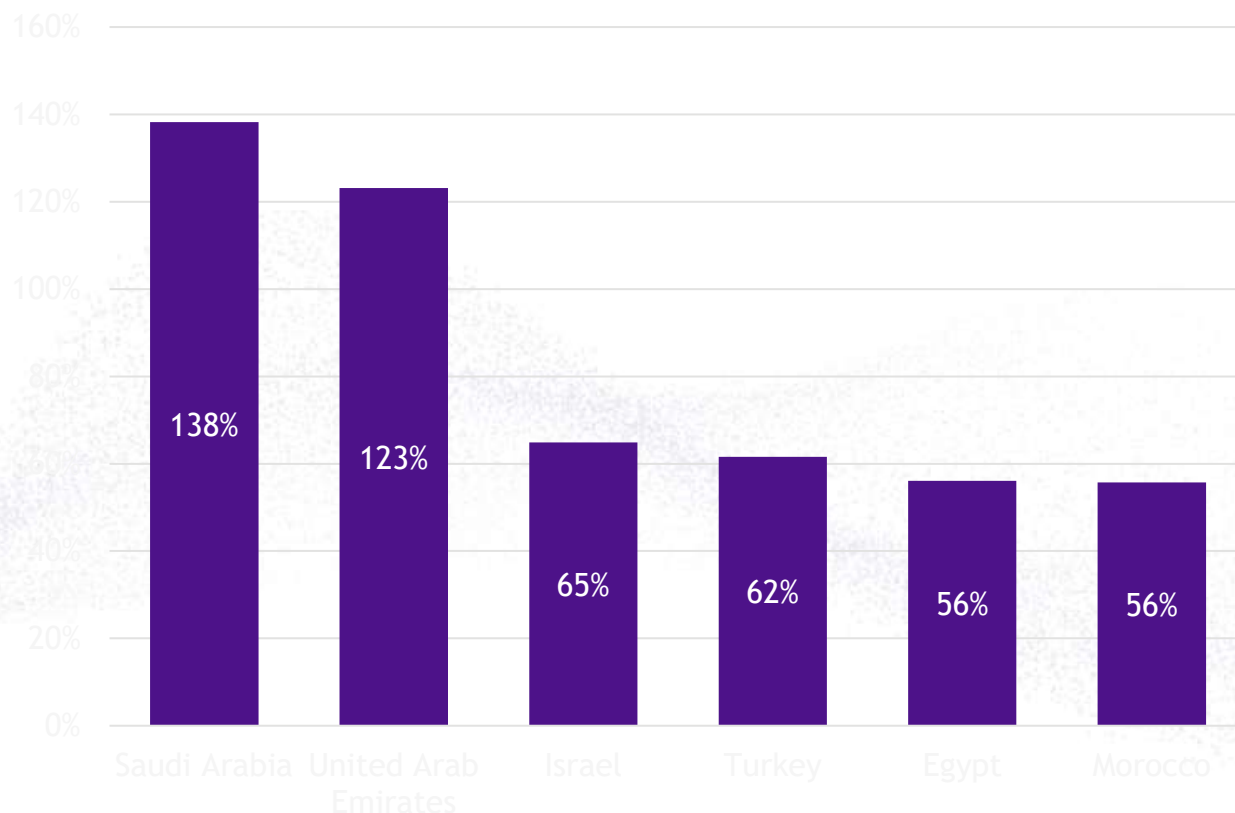
Mai Abaza
CEO
Publicist Inc.
(April 2025)

Media businesses are targeting younger audiences with vertical videos on social media

GEP Insight

MediaTech buyer in an IABM interview

TikTok penetration in selected countries and territories
(as of February 2025)



*Right now we are expanding on all social media platforms like **Facebook, X, YouTube, WhatsApp, Telegram, TikTok, Snapchat** and so on. In all of these social platforms, we are trying to **target** the audiences that **already exist** there. We have a new OTT platform, which is a new centralized project. To **localize** that we still need some time to reach and change the behavior of the audience to install an app or to go to the platform. It's not an easy mission, but I think we are heading there somewhere in the future.*

Public service broadcaster
Middle East
(February 2025)

Local premium streaming services are focusing on profitability and local content through AVOD

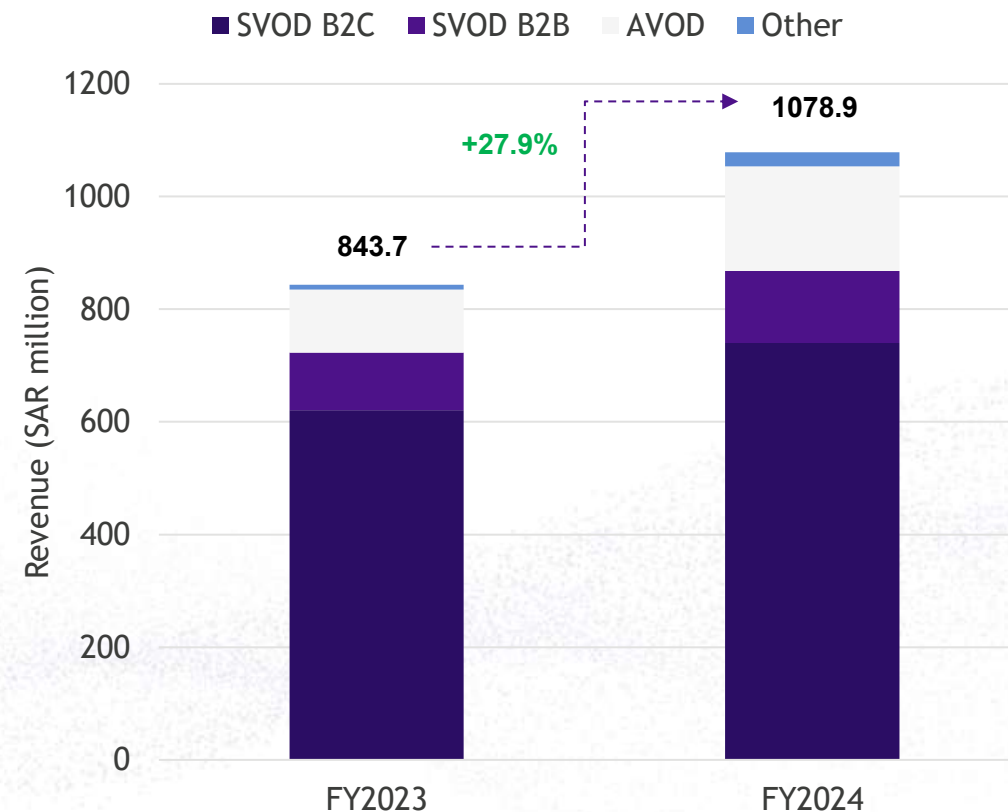
MBC Group Q4 2024 results - earnings release

*Shahid, MBC Group's OTT platform, delivered outstanding growth in FY 2024, solidifying its position as the region's leading streaming platform. The platform achieved a 27.9% YoY increase in total revenues, driven by a **65.4%** in **AVOD** revenues and 20.1% in **SVOD** revenues.[...] Shahid's success in 2024 was fueled by key initiatives that drove **SVOD** and **AVOD** growth. These included **data-driven** decisions that **optimized content** and **marketing** strategies, a streamlined **user experience** with an improved sign-up flow, **enhanced sports engagements** and **innovative advertising***

formats.
MBC Group – Saudi Arabia
(March 2025)



Shahid OTT service - Revenue breakdown



Gulf countries continue to invest in Tier 1-2 sporting events to drive GDP growth and recognition



2022 FIFA World Cup in Qatar - Economic impact

4%

Contribution to Qatar's GDP in 2022

\$17bn

Money injected to Qatar's economy in 2022

0.5m

Jobs created due to the World Cup

58%

Growth in tourism in Qatar in 2022

Major sporting events in the Gulf countries in 2025

	Tier 1	Tier 2	Tier 3
Saudi Arabia	<ul style="list-style-type: none"> F1 Grand Prix Saudi Arabia, Supercopa Italiana WTA Tour Finals, ATP Next Gen Finals LIV Golf Riyadh World Rally Championship Final FIBA Asia Cup Supercopa de Espana 	<ul style="list-style-type: none"> AFC Champions League Elite Finals AFC Asian U17 Cup UIM E1 World Championship (boat racing) Islamic Solidarity Games Saudi Games The Saudi Cup UFC Night Fight WWE Premium Live Event 	<ul style="list-style-type: none"> Esports World Cup
UAE	<ul style="list-style-type: none"> F1 Grand Prix Abu Dhabi DP World Tour Championships 2025 Golf Championship Dubai World Cup 2025 (horse racing) 2025 EuroLeague Final Four 	<ul style="list-style-type: none"> Mubadala Abu Dhabi Open WTA-500 Dubai Duty Free Tennis Championships ATP-500 	<ul style="list-style-type: none"> Dubai eSports and Games Festival
Bahrain	<ul style="list-style-type: none"> F1 Grand Prix Bahrain Bahrain ATP Challenge Asian Youth Games FIBA 3x3 World Tour Final 	<ul style="list-style-type: none"> Bahrain Turf Series (horse racing) 	
Kuwait	<ul style="list-style-type: none"> Arabian Gulf Cup 	<ul style="list-style-type: none"> Badminton Heroes Cup 2025 Padel World Cup Pair 	
Oman	<ul style="list-style-type: none"> Oman Rally, GCC Beach Games 	<ul style="list-style-type: none"> Oman Marathon 2025 	

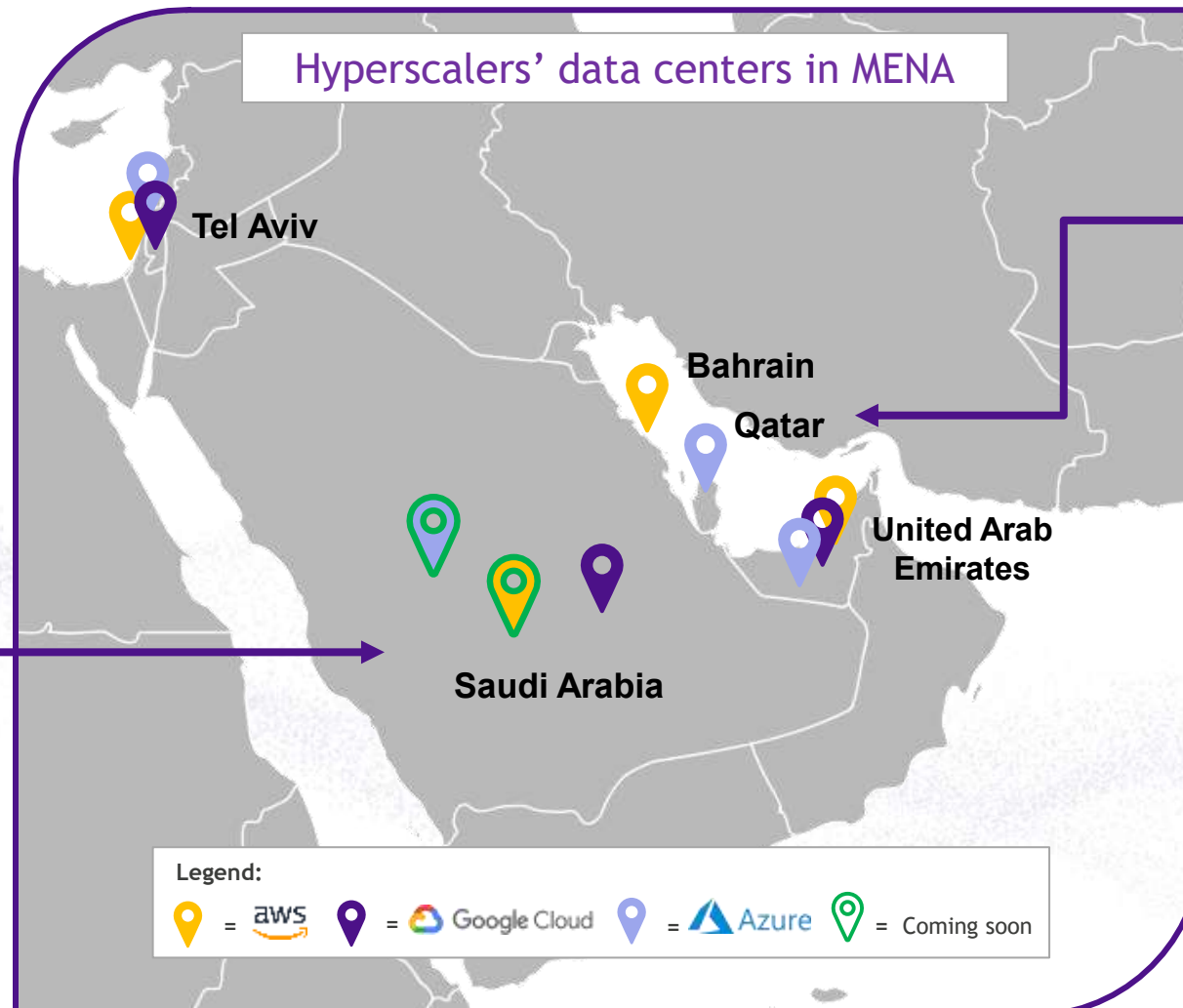
Social media is driving convergence with Broadcast AV, enabling story-centric production

MediaTech buyer in an IABM interview

***Social media** in general is **democratized**. The whole content, the delivery of content and the production of it is something that we are heading to, even the **news content itself**. For example, one of our most successful products is focusing on the local humanized story, which is a simple and focused product currently concentrating on Gaza, Syria and Sudan. We are just **contacting someone from these regions, using an iPhone**. It's someone who is talking about their experience. **We just care about the story**. We just add some minimal graphics and subtitles and we share it [on social media]. **The simplicity** of these stories creates a **connection with the audience**. We received tens of millions of views for these stories. We have tried to even tell people to share their stories and send them to us.*

Public service broadcaster
Middle East
(February 2025)

Saudi Vision 2030 is inducing investment in MediaTech, but elsewhere investment remains flat



The Saudi Vision 2030 is aiming to expand local content production and invest in new cloud infrastructure. In 2026, AWS and Microsoft will open new data centers in Saudi Arabia.

In 2024, the Saudi government announced that it will cease granting any government contracts to media companies headquartered in any other Middle Eastern country, inducing relocation to the KSA.

In Q1 2025, Media City Qatar in Doha announced that it had reached over 100 company registrations ahead of Web Summit Qatar 2025. It also signed a Memorandum of Understanding (MoU) with Huawei to develop a cloud-driven state-of-the-art smart media campus.

The adoption of Cloud and IP is picking up slowly amid challenges related to OpEx models

Cloud and IP adoption - Drivers vs. constraints



New organizations: New organizations who are building new facilities or upgrading existing ones are evaluating the adoption of IP and cloud.



Backup: Cloud is already being used for backup, content archives (media, education), disaster recovery or as a spin off for temporary playout channels.



Successful use cases: Nearly all media companies building a new facility are pushing the adoption of IP, especially SMPTE ST 2110 and have confidence in IP, driven by many successful implementations in MENA.



Last mile connectivity: Cloud connectivity is still not good enough for using very high-end, high-bandwidth applications or to transfer high-end video. If available, the last mile is still expensive in many areas.



Fixed budgeting cycles: OpEx model remains a major constraint especially for major media companies, which are government-owned, because they have a certain fixed budget to be spent each year, instead of distributing the OpEx cost to several budgeting years.

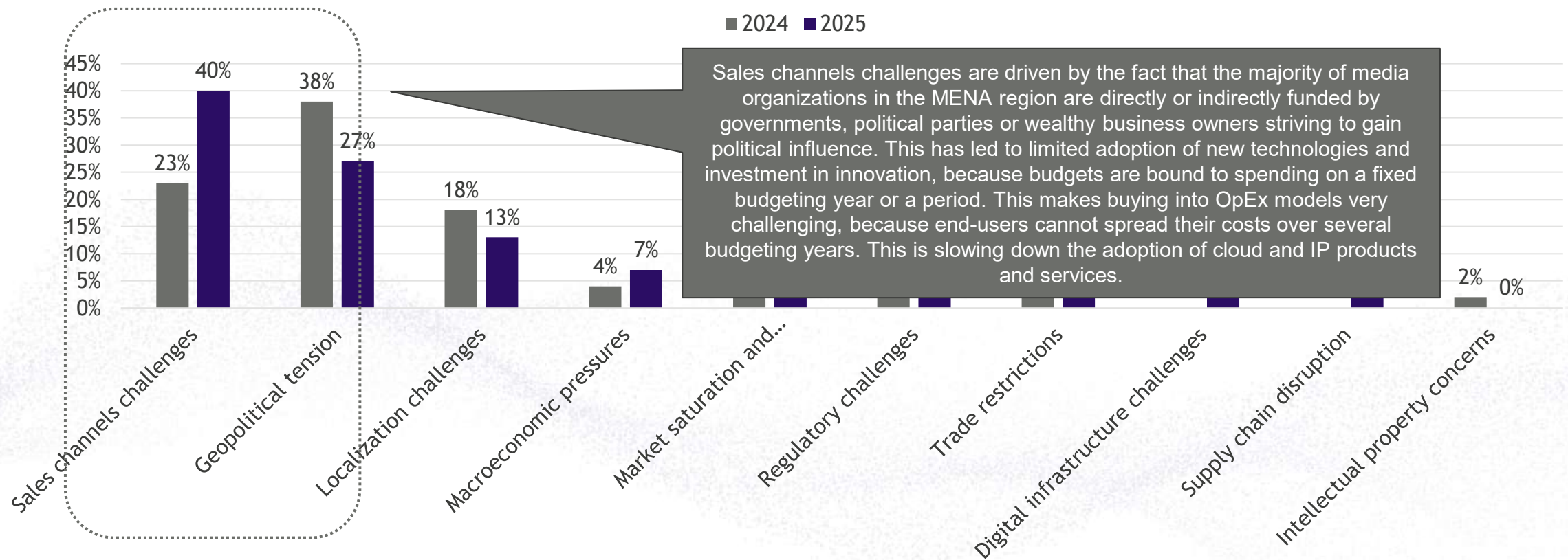


Skill gap: The lack of skillsets and engineers' resistance to adopting IP is slowing down the deployment and usage of the technology.

MENA – Challenges

Sales channel challenges have become a primary barrier to business growth in the Middle East

Regional barriers to growth in the Middle East



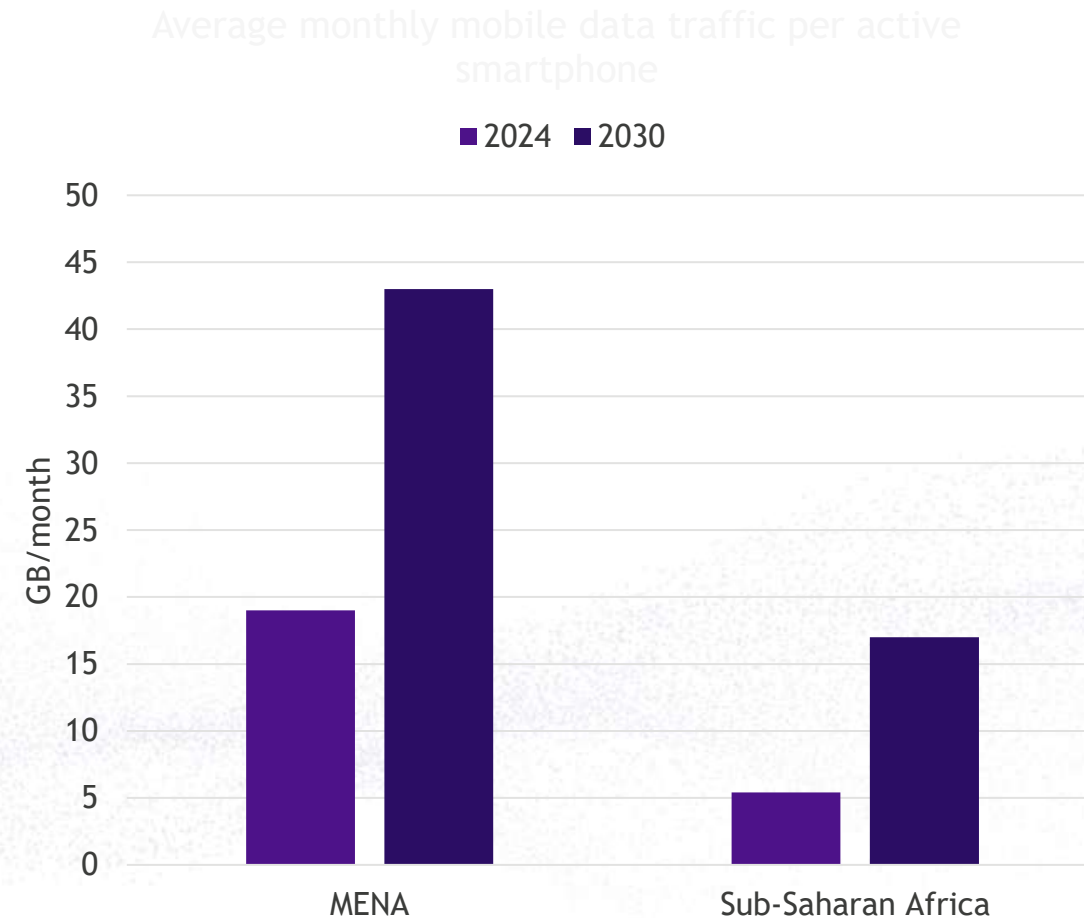
Q. What is the major regional barrier to the growth of your business in each of the regions where your company operates? (All industry, Middle East 2024 n=56, 2025 n=45)

Media businesses in South Africa and Nigeria are investing in OTT, driven by the adoption of 5G

Sub-Saharan Africa's economy is projected to grow by 3-5% over the next five years. Several macroeconomic challenges such as high government debt, limited international financing as well as high inflation in different countries are slowing down the region's digitalization. The telecom sector - investing heavily in the expansion of 5G networks - remains the driving force for the development of the region's M&E industry, as mobile data and smartphones are becoming more affordable and are used by a huge young population.

South Africa has the most mature M&E market in the region, followed by Nigeria and Kenya. The rapid adoption of 5G in these countries is driving investment in OTT platforms by local and international media businesses. Several streaming services are offering cheap mobile-only or ad-supported plans as well as AVOD subscriptions, boosting demand for ad tech. South Africa is estimated to account for roughly one third of all OTT subscriptions in the SSA region. Netflix and Showmax (owned by MultiChoice) remain the leading OTT services, both offering and investing in local and international content.

The pay-TV market in Sub-Saharan Africa is mature and continues to consolidate. In April 2025, Canal+'s acquisition of MultiChoice was approved by South Africa's Competition Tribunal. Linear broadcasters are also investing in infrastructure and new services, despite tight budgets. StarTimes - supported by the Chinese government - has built Direct-to-Terrestrial (DTT) infrastructure in several countries in Africa.



Africa – Challenges

Streaming piracy poses a severe threat to media companies' revenue streams in Africa

Q&A from Annual General Meeting

Piracy is a major challenge in the business, and it affects the revenue. The Company is, however, working hard to combat piracy. MultiChoice has a security company based in the Netherlands, Irdeto, equipped to manage the piracy issues with measures such as watermarking the content. The Company has sanctioned more measures to combat the global issue of piracy.

MultiChoice Group
28 August 2024

>2mn viewers

MultiChoice has estimated that more than 2 million people view pirated versions of the series and movies available on its platform.

MultiChoice Group's anti-piracy initiatives in Africa

In June 2024, MultiChoice launched the Partners Against Piracy campaign in Namibia to combat piracy, supported by multiple African countries and stakeholders.

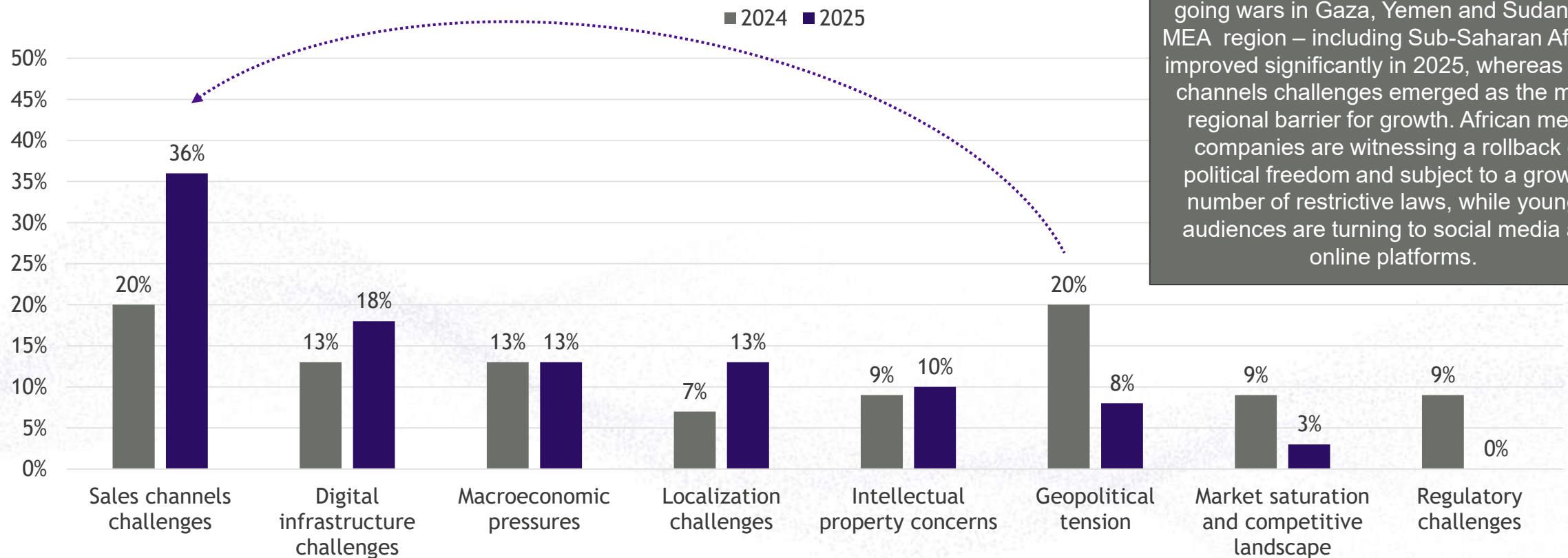
In June-September 2024, MultiChoice conducted a series of raids and arrests in connection with piracy rings. Additional raids and legal proceedings targeting individuals connected to the Waka TV piracy operation are expected in the upcoming months.

In March 2025, MultiChoice signed an MoU with the Ministry of Culture and Sport (MOCS) in Ethiopia and the Ethiopian Intellectual Property Authority (EIPA) to enhance IP protection and combat piracy.

Africa – Challenges

African media companies are under new political and economic pressures, challenging sales

Regional barriers to growth in Africa



After significant geopolitical pressure in 2024 caused by the spillover effects from the ongoing wars in Gaza, Yemen and Sudan, the MEA region – including Sub-Saharan Africa – improved significantly in 2025, whereas sales channels challenges emerged as the major regional barrier for growth. African media companies are witnessing a rollback on political freedom and subject to a growing number of restrictive laws, while younger audiences are turning to social media and online platforms.

Q. What is the major regional barrier to the growth of your business in each of the regions where your company operates? (All industry, Africa 2024 n=45, 2025 n=39)

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