

Megatrend Report

Business Transformation

Business Intelligence Unit, IABM, March 2025

18 April 2026

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Megatrends research family

IABM's Megatrends research examines selected industry topics

Megatrends research explores transformative shifts in MediaTech. In 2025, we are investigating three key trends, based on our ongoing research and discussions with our valued members and Global Engaged Partners (GEPs): Business Transformation, Security in MediaTech Ecosystems, and Game Industry Convergence. This report focuses on our research findings about Business Transformation.

Business Transformation

Focus on strategies for successful business transformation in MediaTech.

Security in MediaTech Ecosystems

Focus on strategies for strengthening security infrastructure, enhancing content protection, and mitigating AI-related vulnerabilities in an increasingly digital ecosystem.

Game Industry Convergence

Focus on strategies for IP monetization, viewer engagement through fan communities and interactivity as well as production synergies (e.g. virtual production, game engine, VFX).

Research Methodology

This report was prepared using a hybrid research approach

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

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 the industry's trends

The quantitative insights featured in this report originate from IABM's survey "Business Transformation", which explores various aspects of business transformation, including the drivers, technologies and challenges associated with transformation initiatives. Most of the survey respondents hold senior leadership positions in their organizations (82% have executive leadership roles, 54% being either CEO, President or Owner), and all are either leading (66%) or involved in (34%) the operational strategy and decision making for their organizations.

Data collection period

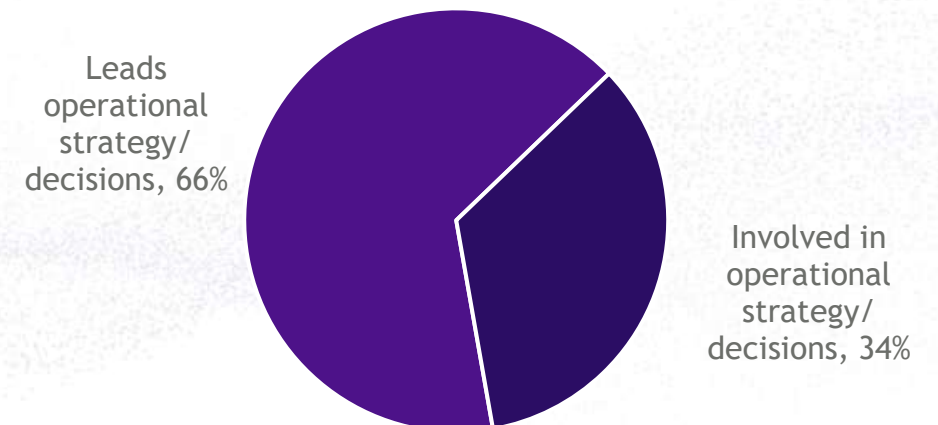
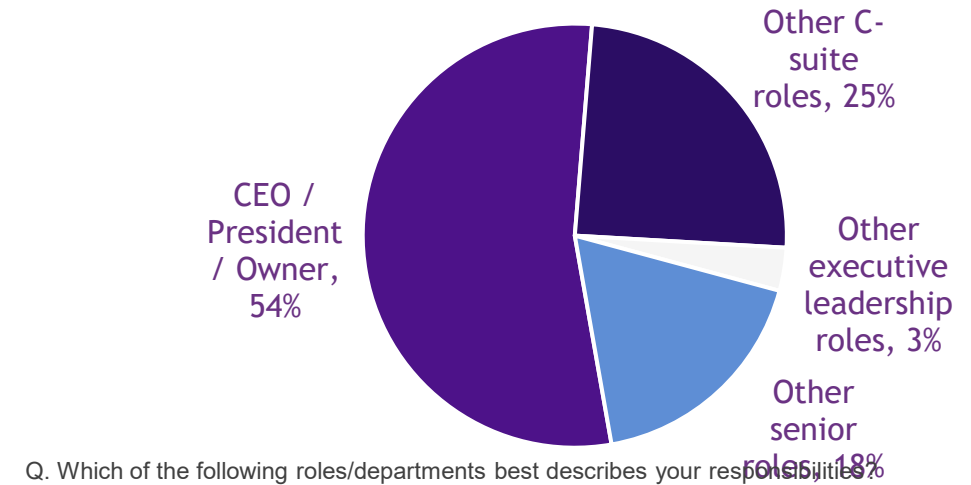
19th February 2025 to 10th March 2025

Sample size

61 respondents.

Survey length (median)

4 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. These insights represent real-world challenges and priorities, ensuring the report reflects the needs of both vendors and buyers. Quotes included in this report are featured anonymously or attributed with permission.

Report Structure

This report consists of an executive summary and main body

- The first section of this report, Snap Insights, provides an overview of key research findings.
- The main body examines transformation drivers, planning and measuring transformation, transformation challenges and transformation success.

All sources are listed at the bottom of each slide, along with explanations of any data analysis methods used to illustrate industry trends.



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



Snap Insights

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Snap Insights

What is business transformation?

- For the purposes of this report, business transformation is defined as **strategic** and **operational overhaul** to adapt to rapidly changing market conditions, consumer behaviors and technological advancements.
- This involves leveraging **innovative technologies**, revising **business models** and reshaping **organizational processes** to drive growth, efficiency and competitiveness.
- Business transformation in MediaTech is the **re-invention** of content creation, distribution and monetization through emerging technologies, data-driven strategies and evolving consumer demands. It involves integrating emerging technologies and digital platforms to enhance **audience engagement**, streamline **operations** and unlock new **revenue streams**.

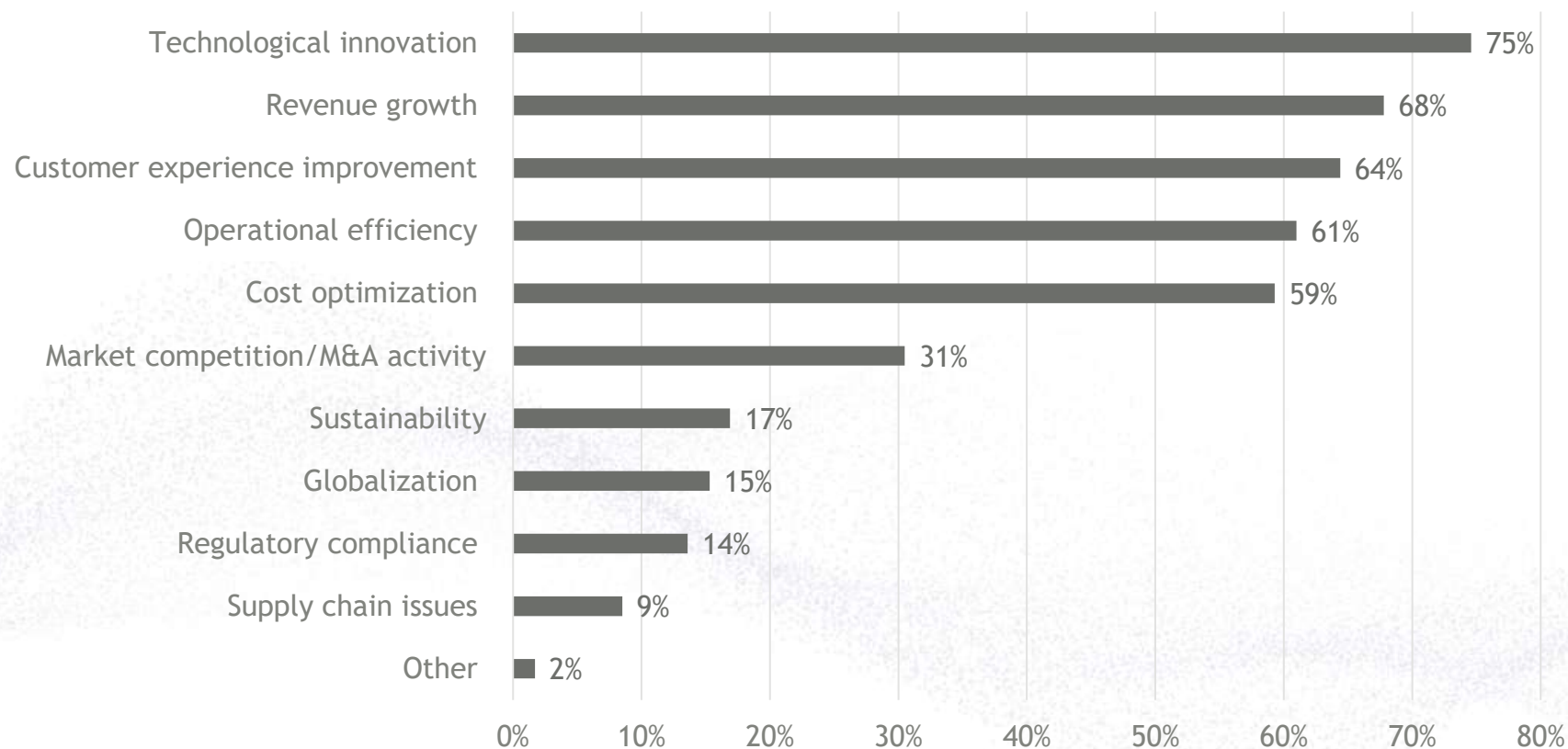
Quoted by Institute of Directors

*In today's era of volatility, there is no other way but to **re-invent**. The only sustainable advantage you can have over others is **agility**, that's it. Because nothing else is sustainable, everything else you create, somebody else will replicate.*

Jeff Bezos
Founder
Amazon

Snap Insights

Technological innovation is the overall biggest driver of business transformation



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

- **Technological innovation** is the biggest driver of business transformation overall but comes slightly behind **revenue growth** and **customer experience improvement** for smaller companies (up to 50 employees).
- **Cost optimization** is significantly more important in North America relative to other regions, with market saturation, competition and consolidation being key contributing factors.
- **Technological innovation** drives efficiency, scalability, and new revenue opportunities in MediaTech. Without it, organizations risk becoming obsolete as the shift to digital platforms and OTT distribution accelerates.
- In addition to being a transformation driver, **technological innovation** is also a transformation enabler.

Snap Insights

Technology innovation is a transformation driver and enabler

Tech innovation as a transformation **driver**

Tech innovation as a transformation **enabler**

MediaTech suppliers

Tech innovation creates new markets and shifts demand, allows businesses to **scale** and **optimize operations** (e.g. the shift from SDI-based hardware to IP-based workflows forced traditional vendors to rethink their product lines).

Tech innovation **provides tools** for suppliers to optimize R&D, enhance their offerings and improve efficiency (e.g., cloud enabling AI-driven automation in production tools).

When suppliers introduce disruptive innovations, they push broadcasters and media companies to adapt and evolve, or risk falling behind.

By providing scalable, cost-efficient and cutting-edge solutions, suppliers enable media companies to execute their own transformation strategies more effectively.

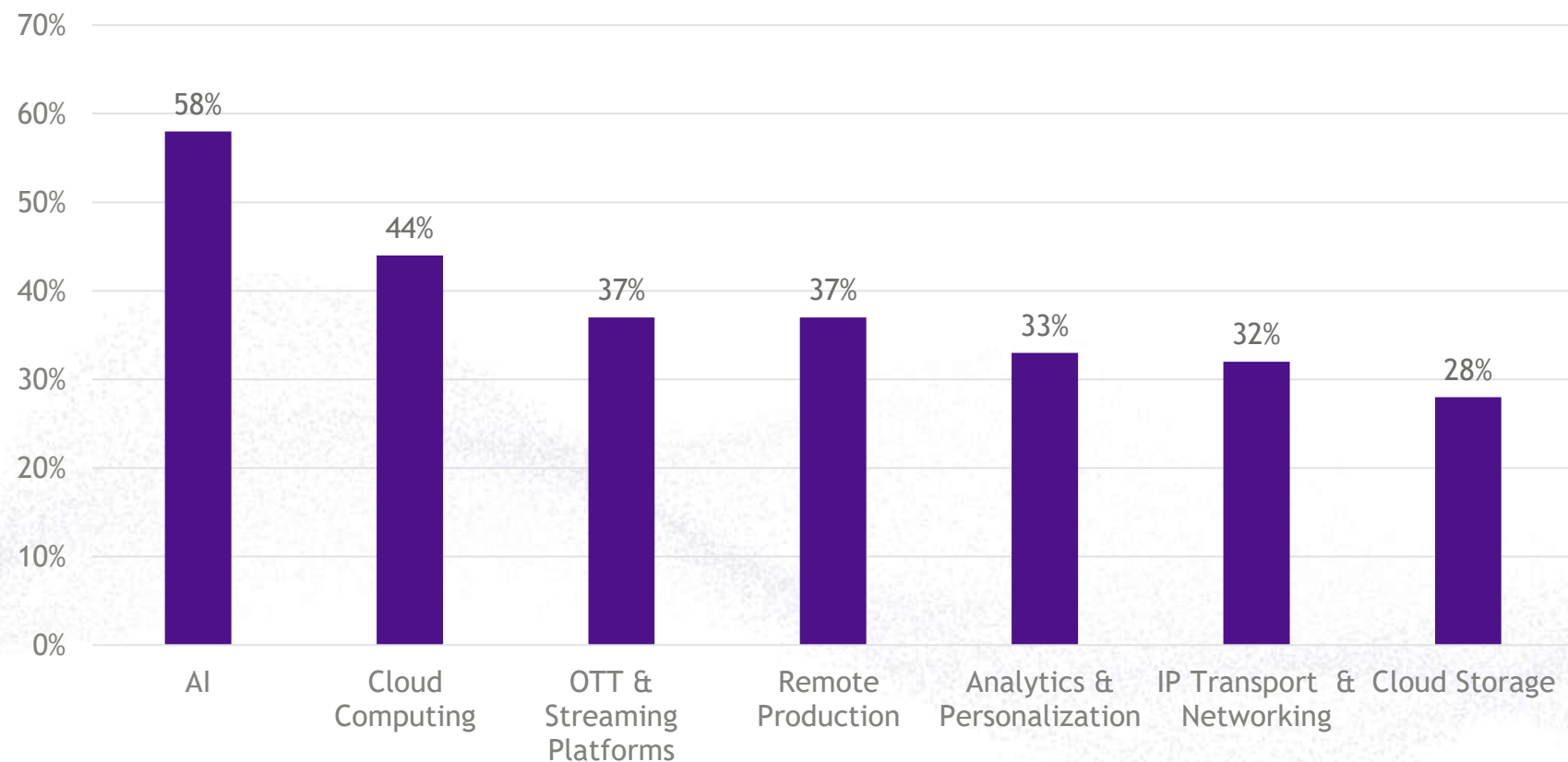
Broadcast & Media companies

Tech innovation **disrupts** traditional broadcast and media **business models**, forcing transformation (e.g. video on demand overtaking linear TV, AI-generated content competing with traditional production).

Tech innovation allows broadcast and media businesses to **scale** and **optimize operations** to keep up with evolving consumer needs, the influence of parallel markets and the growing creator economy.

Snap Insights

AI is the most pivotal technology in business transformation

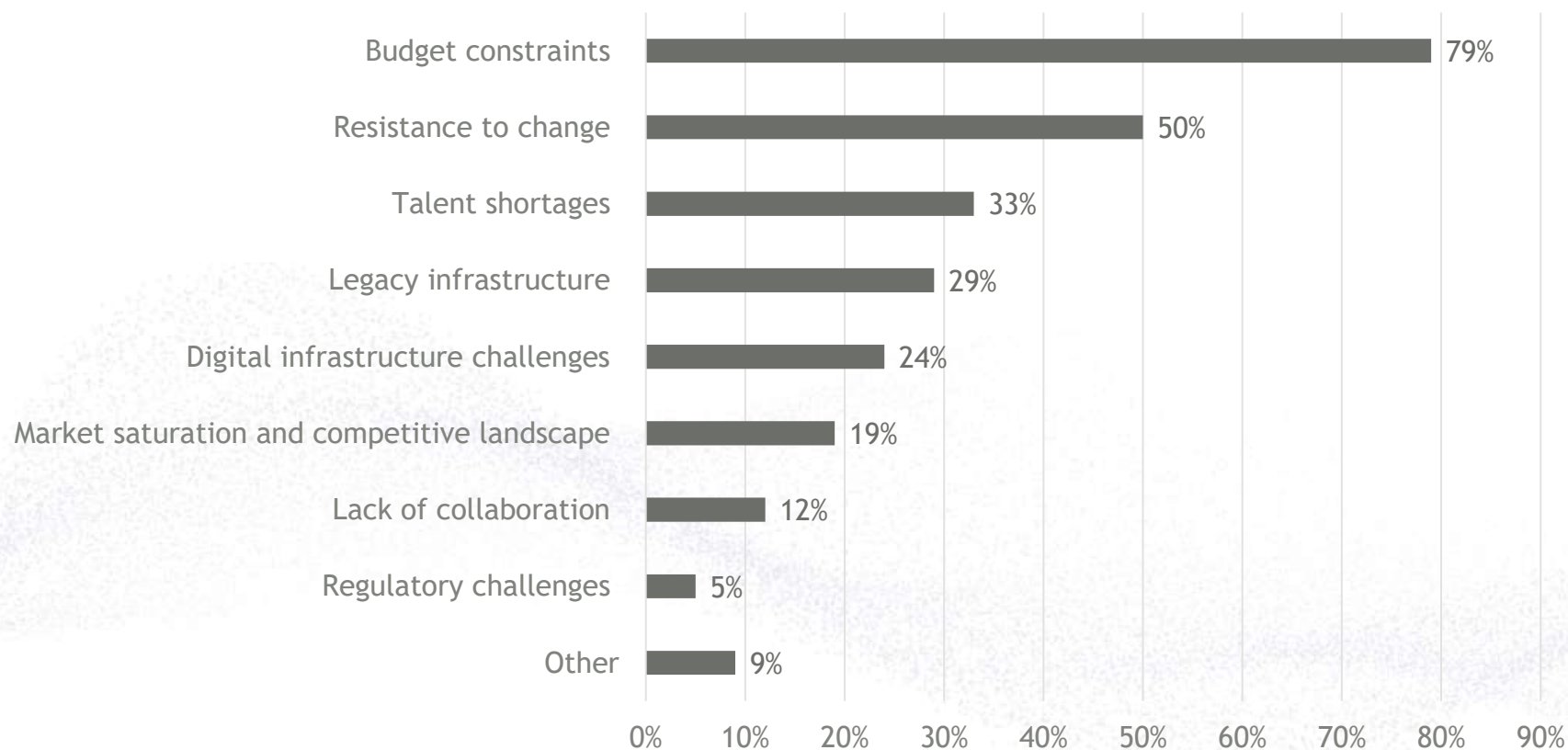


Q. Which technologies are most critical to your transformation initiatives? Only most popular responses are shown in the chart.

- **AI** is the most critical technology across all business size categories, but particularly so for larger companies (over 50 employees).
- **AI** is a key transformation **enabler**, driving efficiency and engagement while opening new revenue streams.
- The initial wave of hype for **generative AI** has transitioned into a pragmatic focus on business opportunities and real-world use cases in MediaTech.
- Companies are moving beyond **AI fascination** and instead leveraging it for measurable **business impact**.

Snap Insights

Budget constraints are the biggest challenge in business transformation

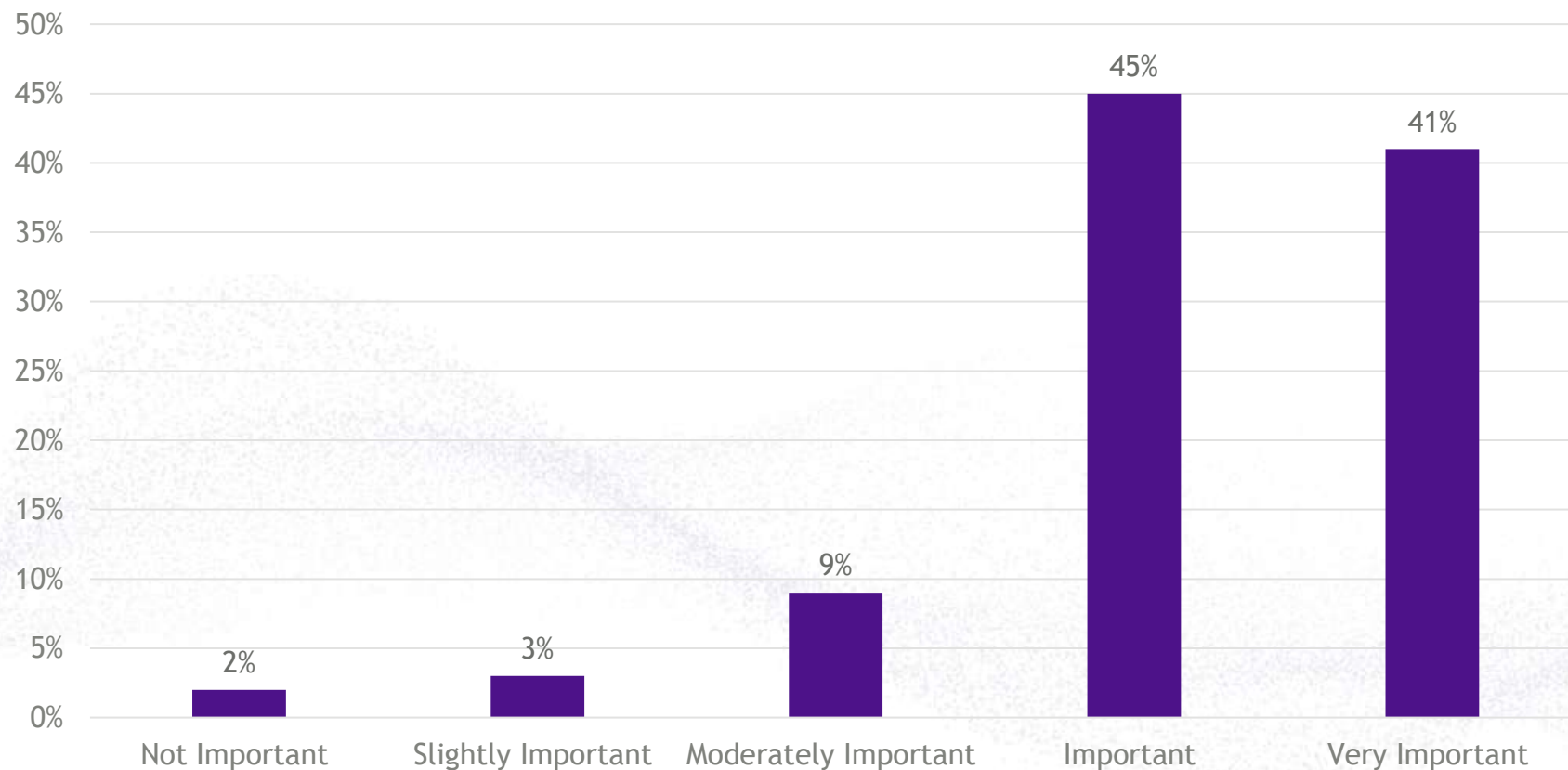


Q. What are the biggest challenges you face in implementing business transformation initiatives?

- **Budget constraints** are the biggest challenge in business transformation across all business size categories, but particularly for smaller companies (up to 50 employees).
- Tight budgets from **market conditions** and **economic** factors limit funding for major technology or infrastructure upgrades.
- **Resistance to change** can come from both employees and leaders; for example, employees may resist change due to job security fears, while leaders may resist change due to **risk aversion** or **financial concerns**. This can slow the adoption of new workflows, hindering transformation.

Snap Insights

Collaborations and partnerships are key to successful business transformation



Q. How important are collaborations and partnerships to your transformation strategy? .

- Overall, 86% of survey respondents stated that **collaborations** and **partnerships** are important/very important for transformation, this importance being slightly greater for larger companies (over 50 employees)
- Collaborations and partnerships are key to successful business transformation in MediaTech, as they help companies to **share resources**, reduce **costs**, accelerate **innovation** and expand **market reach**.

Successful business transformation is well prepared, inclusive and innovative

Look outside the industry

- Don't hesitate to reach **outside** of the broadcast and media industry for insights and solutions.
- Many of the challenges faced during transformation have been addressed in **other sectors**, e.g. ProAV.

Start simple and actionable

- Start with a straightforward, actionable transformation plan and limit KPIs to avoid unnecessary **complexity**.
- As transformation evolves complexity can increase, but keep the initial approach **simple**.

Support your workforce

- Provide clear communication on how transformation benefits individuals' **growth** as well as the organization.
- Offer educational resources and **upskilling** opportunities to support and nurture employees through change.

Open ecosystem approach

- Collaborate and transform by adopting **flexible, interoperable** systems to support diverse customer needs.
- **Open ecosystems** enable innovation and create an environment where the best solutions can emerge.

Challenge tradition

- Be willing to **abandon legacy systems** and processes that no longer serve evolving market demands.
- Change is a constant - those who **embrace** change will thrive, those who cling to the past risk falling behind.

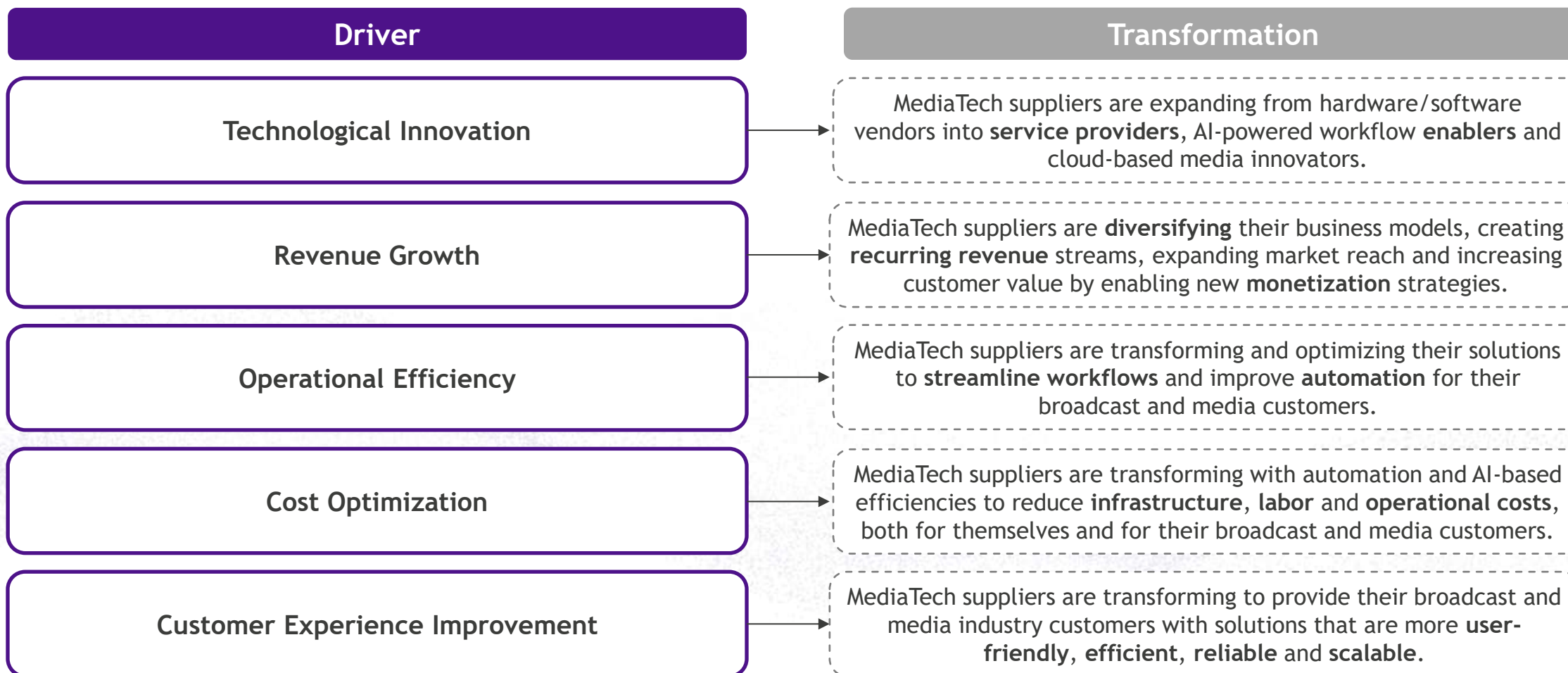


Transformation Drivers

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Transformation Drivers

Key drivers for transformation include innovation, optimization and efficiency



AI is a key technology driver and enabler of business transformation

- AI is increasingly being used by suppliers to transform their own businesses by improving their **products**, reducing **costs**, and enhancing **service delivery**.
 - **Product Innovation & Automation:** AI-powered tools (e.g., automated video editing, AI-based playout, real-time graphics) are being used to transform product offerings.
 - **Cost Optimization:** AI is being used to reduce operational costs through automation (e.g., predictive maintenance, AI-driven support).
 - **SaaS & Cloud-Based AI Offerings:** Suppliers are integrating AI into cloud-based services, making AI-driven media workflows more accessible.
 - **AI in Ad Tech & Monetization:** AI-driven advertising solutions (e.g., contextual ad placement) are being used to create new revenue streams for suppliers.
- AI is also transforming how broadcasters and media companies **create**, **distribute** and **monetize** content.
 - **AI-Powered Content Creation & Personalization:** AI assists in content recommendations, automated editing and synthetic media.
 - **Audience Engagement & Monetization:** AI is increasingly being used to optimize ad targeting, programmatic advertising and viewer engagement strategies.
 - **Operational Efficiency & Cost Reduction:** AI can help automate compliance, metadata tagging, and media asset management.
 - **Live & Remote Production Optimization:** AI-driven production workflows are growing in popularity, enabling many more small-scale productions and even solo-operators to produce additional content.

MediaTech Consultant in an IABM interview

*Technology always used to be the main driver of business transformation but now, even though there's still massive technology **disruption** coming in, like **AI**, I think the conversations are much more around **business** now than they were historically. Now I think it's about understanding what **business opportunities** these technologies are enabling.*

Neil Maycock
Founder
NM Advisors
(February 2025)

Cloud computing is an optimizer and accelerator of business transformation

- **Cloud computing** plays an important role in business transformation for MediaTech suppliers and their broadcast and media customers, evolving from a **driver/disrupter** role into that of an **optimizer/accelerator** as cloud strategies mature, making the adoption of other technologies faster and smoother.
- Cloud infrastructure can enhance **scalability**, reduce operational **costs** and increase **agility** in content production and distribution, facilitating collaboration across geographies, real-time data analytics and the rapid deployment of new services, all of which are essential in today's **rapidly evolving** market.
- However, the trend is not unidirectional, with some organizations engaging in “**cloud repatriation**”, selectively moving workloads back from public cloud to on-premises or private cloud environments. This shift is often driven by factors such as **cost** management, data **security** concerns and the need for greater **control** over critical assets. This is supported by IABM's TechTracker research, which reports survey findings that while cloud remains important on technology roadmaps, it is **unlikely** to be seen as **top priority**.
- Cloud computing is accelerating the use of **AI** in business transformation, and the availability of **AI as a Service** (AlaaS) through cloud platforms is **democratizing** access to advanced AI capabilities. MediaTech companies can now integrate **pre-built AI models** and tools into their workflows without significant upfront investments in infrastructure, enabling smaller organizations to innovate and compete by transforming their content offerings with features like **automated editing**, **content recommendations** and **audience analytics**.

MediaTech Supplier in an IABM interview

*We're seeing that people went way down the cloud route and now they're going more **hybrid** and saying, not only do I want to have **multi-cloud**, but I want to have some hardware and some cloud services because for things that are **running 24/7 365**, I can squeeze more out of **hardware** than I can out of cloud resources.*

Brenton Ough
CEO & Co-Founder
Touchstream
(November 2024)

Transformation Drivers

Revenue growth is driving transformation through innovative monetization

- In the current challenging market environment, **revenue growth** has become a key driver of business transformation. To navigate economic headwinds and evolving industry dynamics, MediaTech suppliers and customers are **diversifying** their business models, creating **OpEx revenue streams**, expanding **market reach** and enhancing customer value through innovative **monetization** strategies.
- **Diversification of Business Models and Creation of Recurring Revenue Streams:** MediaTech suppliers are increasingly adopting subscription-based and hybrid **monetization** models to ensure consistent and predictable income. For example, Croatian OTT/IPTV solution providers **UniqCast** has focused on implementing hybrid monetization models, enabling the integration of ad-supported streaming, subscription-based services and transactional models into a **single flexible platform** to cater to diverse audience preferences. This approach allows service providers to blend **subscription** video on demand (SVOD), **advertising-based** video on demand (AVOD), and **transactional** video on demand (TVOD) models, thereby diversifying revenue streams and enhancing profitability.
- **Enhancing Customer Value through New Monetization Strategies:** Broadcast and media companies are adopting **flexible pricing models** like dynamic pricing and personalized subscriptions to boost customer value, engagement and retention. By experimenting with diverse strategies, they aim to protect and grow subscription revenues. For example, in response to the decline in traditional Pay-TV subscriptions, **Charter Communications** has been progressively integrating streaming services into its cable packages since September 2023. By partnering with **Warner Bros. Discovery** and others, as of early 2025 Charter is offering customers ad-supported access to major streaming platforms like **Max** and **Disney+** as part of their cable subscriptions. This bundling approach aims to **reduce customer churn** and attract new subscribers by providing a comprehensive entertainment package.

Transformation Drivers

Customer experience is driving transformation in MediaTech

- **Customer experience (CX)** is an important driver of business transformation for both MediaTech suppliers (serving broadcast and media B2B customers) and broadcast and media companies (serving viewers and advertisers).
- **Improving CX** has become a significant driver of transformation for MediaTech suppliers, aiming to provide their broadcast and media industry customers with solutions that are more **user-friendly, efficient, reliable** and **scalable**. Many professionals in broadcasting learn as they go, so tools should support **self-education**, e.g. integrating a camera's user manual into its control panel helps users quickly find guidance while working.
 - **User-friendly interfaces:** Broadcast and media companies are increasingly demanding solutions that simplify complex workflows and require minimal training. For example, production tools with accessible browser-based interfaces are often chosen as they are perceived to be more intuitive than dedicated hardware.
 - **Reliability and scalability for live and on-demand content:** Broadcast and media companies require resilient and scalable solutions for bandwidth-intensive streaming events. For example, **Vizrt's** remote production tools have been used by **ESPN (2023)** to ensure uninterrupted, high-quality sports broadcasts with minimal physical infrastructure.
- **CX** is also an important driver of business transformation for broadcast and media companies, aimed at engaging and retaining viewers and advertisers by delivering **high-quality** content, **low-latency** content delivery and **personalized** interactions.
 - **Content quality and accessibility:** Viewers expect high-quality, low-latency streaming with minimal buffering, available across multiple devices. Ensuring seamless content access through intuitive user interfaces, personalized recommendations and easy navigation is crucial. For example, **Netflix** and **Disney+** invest heavily in adaptive bitrate streaming (ABR) to maintain high-quality playback across different network conditions.
 - **Personalization and engagement:** AI-driven content recommendations and dynamic user interfaces enhance user engagement and retention, while providing customized subscription models, multi-profile personalization and interactive content experiences helps to keep audiences loyal. For example, **Sky Deutschland** uses **ThinkAnalytics'** AI-powered recommendation engine to tailor content suggestions to improve viewer satisfaction and reduce churn.

MediaTech Supplier in an IABM interview

*I think it's up to us as manufacturers to make sure that people are in an environment which feels **intuitive** to them; we need to make sure that we **speak the language** of the users. If you work with a creative, they are not hired to **understand IP, cloud deployments, or whatever**. So, we need to make sure that we provide the tools for the creative to get as **creative** as he or she can be under all circumstances.*

Ronny van Geel
Director of Product Marketing
Grass Valley
(February 2025)

Transformation Drivers

Operational efficiency and cost optimization are key transformation drivers

- **Operational efficiency and cost optimization** are increasingly pivotal drivers of business transformation for both MediaTech suppliers and broadcast/media companies; however, the latter often face more immediate **financial pressures** due to fluctuating advertising revenues and the need to adapt to consumer preferences. Consequently, **cost optimization** tends to be a **more significant driver** of business transformation for broadcast and media companies, compared to their technology suppliers.
 - This is supported by results from IABM's Business Transformation survey, which shows cost optimization as the **joint most important transformation driver** (along with technological innovation) for broadcast and media company respondents.
- **MediaTech suppliers** are focusing on enhancing **operational efficiency** to remain competitive and meet the evolving demands of their clients.
 - **Ross Video** highlighted, in a January 2025 blog post, the importance of flexible technology solutions to reduce long-term costs and improve operational efficiency. MediaTech suppliers are increasingly discussing **total cost of ownership** (TCO) with customers, and offering data to support these calculations during the sales process. By adopting **adaptable** systems, MediaTech customers can extend the **lifespan** of their technology investments, minimizing the need for frequent upgrades.
 - In early 2023, **AWS** initiated substantial **cost optimization** measures, including streamlining operations and enhancing resource allocation. This approach not only reduced operational expenses but also **improved service delivery** to broadcast and media clients relying on AWS infrastructure.
- **Broadcast and media companies**, facing economic headwinds and a rapidly changing media landscape, are implementing transformation strategies to **optimize costs** and improve **operational efficiency**.
 - In January 2025, India's **Zee Entertainment** reported a significant increase in third-quarter profit margins, largely due to cost-cutting measures. Operational costs were reduced by 16%, leading to an improvement in core profit margins from 10.2% to 16.1% compared to the previous year.
 - In February 2025, Australia's **Nine Entertainment** announced plans to achieve over \$100 million in cost efficiencies by the end of fiscal year 2027. This initiative includes restructuring efforts and workforce reductions to address financial challenges and revenue losses.

Planning and Measuring Transformation



Planning and Measuring Transformation

Business transformation project planning process

- A business transformation project for a MediaTech supplier or customer typically involves three major stages: **planning**, **execution** and **review**. Each stage has key steps to ensure a smooth and effective transition.

Planning:

Setting the foundation

- Define business goals & vision
- Assess current state & readiness
- Secure stakeholder engagement & buy-in
- Technology & vendor selection
- Budgeting & ROI analysis

Execution:

Implementation & change management

- Pilot testing & proof of concept
- Infrastructure & system deployment
- Data migration & security measures
- Training & employee support
- Monitoring & troubleshooting

Review:

Measuring success & optimization

- Performance tracking & KPIs (operational, financial, customer impact)
- Stakeholder & user feedback
- Adjustments & optimization
- Scaling & future roadmap

Planning and Measuring Transformation

A robust plan sets the foundation for successful business transformation

- Business transformation is not just about adopting new technologies - it's about **aligning** them with **business goals**, ensuring **financial viability** and preparing the **workforce** for change. Organizations should only proceed when there's a clear **strategic rationale**, **leadership commitment** and a **structured roadmap** for execution.
- Before committing to transformation, organizations should evaluate the following:
 - **Market and competitive analysis:** Are **competitors** achieving significant advantages through transformation? To what extent is this due to their adoption of **new technologies** (e.g. cloud-based production, AI-driven content personalization, IP-based workflows)?
 - **Business performance review:** Are current operations **inefficient**, **costly** or struggling to meet market demands? Are **revenue streams** under pressure due to new **market dynamics** (e.g., streaming dominance, ad revenue declines)?
 - **Customer expectations and demand:** Are customers (viewers, advertisers, broadcast and media organizations) demanding **new capabilities**, such as **hyper-personalization** of content, higher-quality streaming, or flexible distribution? Are existing solutions meeting the **evolving needs** of broadcasters and content creators?
 - **Technology maturity and readiness:** Is **legacy technology** becoming a barrier to agility, scalability, and innovation? Is the infrastructure and workforce ready for transformation?
- The latest stage of Norwegian public broadcaster **NRK's** current modernization project, involving the construction of new facilities with **IP-based infrastructure**, was the result of a **comprehensive evaluation** of existing infrastructure, involving key stakeholders from across the business. It was recognized that IP-based infrastructures offer more **flexibility** and **scalability** compared to traditional systems, as well as improved operational **efficiency** and enhanced service delivery, enabling more **interactive** and **personalized** content delivery.

GEP Insight

MediaTech Customer in an IABM interview

*We looked at other broadcasters that were in the process of **refurbishing** and **modernizing**, a few organisations in particular: **CBC** in Canada, the **BBC Cardiff** project, the **SRG** project in Switzerland [also shifting to IP] and projects with **VRT** and **RTBF** in Belgium. I would say those are the kind of **role models** for the programme. We also used several **consultancies**.*

Geir Børdalen

Head of Technology Portfolio

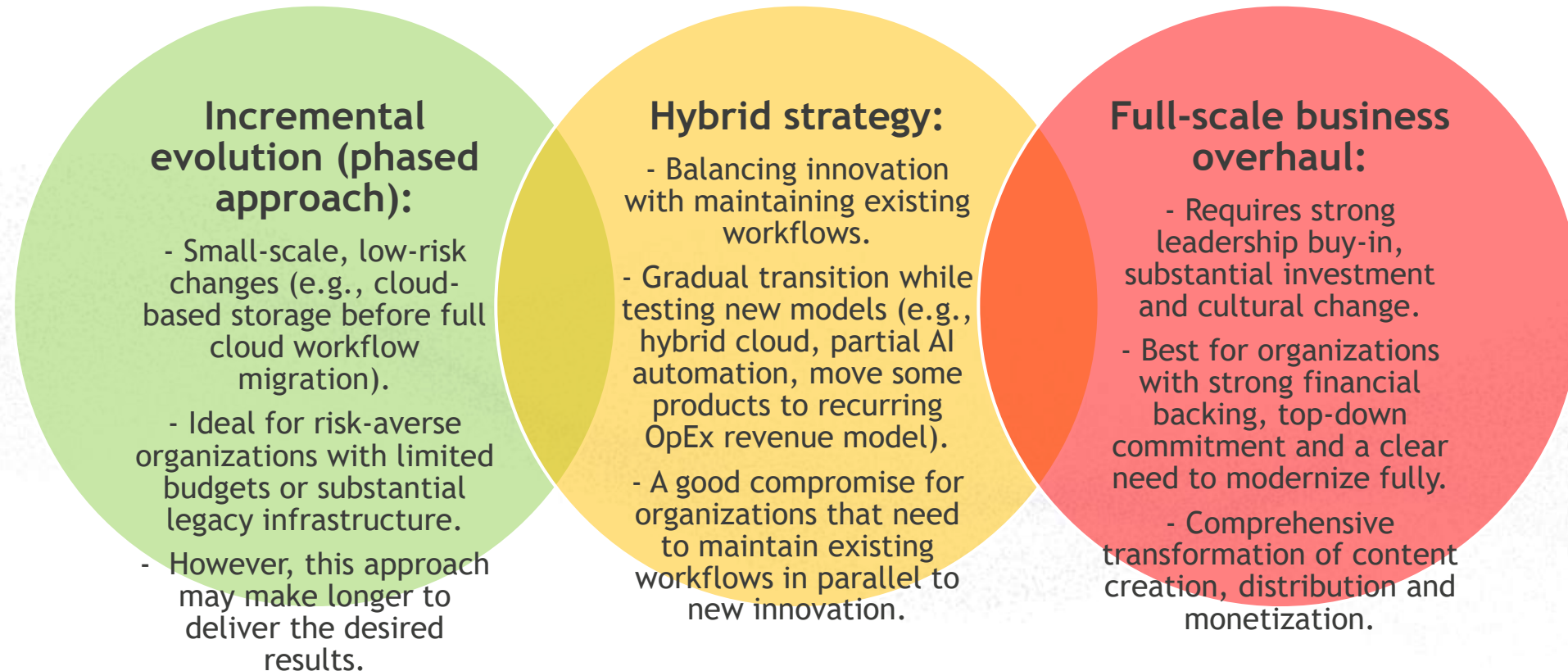
NRK

(January 2025)

Planning and Measuring Transformation

Choosing the right transformation approach is crucial to success

- Choosing the right transformation approach - **incremental evolution**, **full-scale business overhaul**, or a **hybrid strategy** - depends on several factors including budget, risk tolerance, competitive positioning and operational readiness.



Planning and Measuring Transformation

Planning is key to transformation success: fail to prepare, prepare to fail

- A lack of thorough preparation for business transformation can lead to failure due to misaligned strategies, lack of engagement and operational challenges.
 - **Market misalignment:** Without sufficient market research, broadcast and media technology companies risk launching products or services that do not meet customer needs or fail to stand out in a competitive landscape. Entering an oversaturated market without a clear value proposition can lead to low adoption rates, wasted investment and an inability to gain market share.
 - **Stakeholder resistance:** Business transformation requires early buy-in from leadership, employees, and customers. Poor communication, lack of training and failure to involve key stakeholders early in the process can lead to skepticism, disengagement and active resistance.
 - **Financial risks:** Failure to accurately assess costs and revenue potential can lead to unsustainable investments. If a company invests heavily in a transformation initiative without realistic financial projections, it may quickly face budget constraints, forcing project delays, downsizing, or even cancellation.
 - **Operational and technology challenges:** Ignoring infrastructure compatibility, interoperability issues and skill gaps can hinder successful transformation. Transitioning from legacy systems to modern digital solutions requires careful integration planning, staff training and ongoing support.

Case Study: CNN+

The failure of subscription-based streaming service **CNN+** highlights how business transformation can collapse without proper **planning**, market **validation**, and strategic **alignment**. Launched into a saturated streaming market in 2022, **CNN+** lacked **differentiation** and overestimated consumer **demand**, attracting fewer than 10,000 daily users despite projections of millions. **Costly investments** of \$300 million proved **unsustainable** as poor early **performance** led to swift shutdown. Timing was also a key issue - launched just before **WarnerMedia's** merger with **Discovery**, the new leadership deprioritized **CNN+**, sealing its fate. This case underscores the need for **research**, **realistic goals**, and **stakeholder alignment** in transformation efforts.

Planning and Measuring Transformation

The execution phase of business transformation requires careful management

- Executing a business transformation requires **meticulous planning and management** across several key areas:
 - **Pilot testing and proof of concept:** Validate new technologies or processes on a **small scale** before full-scale implementation to **mitigate risks**. For example, in 2023 **Seven West Media** shifted its focus from traditional linear TV to its in-house streaming platform, **7plus**. The company launched new shows exclusively on **7plus** to test audience engagement and platform performance before broader releases.
 - **Infrastructure and system deployment:** Implement the necessary technological **infrastructure** to support new systems and processes. This includes the creation of a **deployment roadmap** with timelines, resource allocation, and risk management strategies, followed by implementation in **phases**, rolling out new systems **incrementally** to ensure stability and allow for adjustments.
 - **Data migration and security measures:** Ensure seamless and secure **transfer of data** to new systems, maintaining integrity and compliance. First, **evaluate data quality and relevance** before migration. Next, plan the **transfer process**, including timelines and backup procedures. Follow this by implementing **security protocols**, i.e. measures to protect data during and after migration, such as **encryption and access controls**.
 - **Training and employee support:** Equip staff with the necessary **skills and knowledge** to adapt to new systems and processes. This includes an assessment of **training needs** to identify skills gaps and training requirements, the development of **internal training programs** (and/or identification of appropriate external training), and the provision of **ongoing support**, including the use of helpdesks, mentorship programs and continuous learning opportunities. This is covered more fully in the “People-Powered Transformation” section of this report.
 - **Monitoring and troubleshooting:** Continuously oversee the **performance** of new systems and **address issues promptly** to ensure smooth operations. **Monitoring** systems need to be established from the outset of a transformation program, including tools to **track system performance and user feedback**. Troubleshooting protocols, including procedures for **identifying, reporting and resolving problems**, should also be defined. Regular **reviews** should be scheduled to assess progress and implement improvements. For example, **Netflix's** strategic innovations, such as launching an **ad-supported service** and cracking down on **password sharing**, contributed to a substantial increase in subscribers. In Q4 2024, **Netflix** reported its largest quarterly subscriber gain ever, adding nearly 19 million subscribers. The company **continuously monitors** these initiatives to adapt and maintain its market position.

Planning and Measuring Transformation

Measuring transformation enables adaptability and optimization

- **Measuring, reviewing and optimizing** a business transformation project is crucial to ensure continued success and adaptability.
 - **Performance tracking and KPIs:** Measure the effectiveness of transformation initiatives through specific, quantifiable **metrics**. KPIs should be defined that are **aligned** with organizational goals, e.g. **operational** (system uptime, content delivery speed, production efficiency), **financial** (revenue growth, ROI, cost reductions) and **customer impact** (user engagement, satisfaction scores, subscription rates). **Monitoring** tools should be implemented, such as analytics platforms and dashboard to collect and visualize data in real-time. **Periodic reviews** should be conducted to assess performance against established benchmarks.
 - **Stakeholder and user feedback:** Gather **insights** from internal and external parties to **evaluate** the transformation's **impact** and identify **areas for improvement**. This can include the use of surveys and interviews with employees, customers and partners to collect **qualitative feedback**. Platforms such as suggestion boxes, forums and regular meetings can be used as sources of feedback, It is important to not just focus on feedback collection as an end to itself, but to **actively analyze** it to identify common themes, concerns and suggestions to inform future decision making.
 - **Adjustments and optimization** Refine **strategies** and **processes** based on performance data and feedback to enhance outcomes. Formulate strategies to **address identified issues**, including **resource allocation** and **timeline adjustments**. Adjustments to the plan should be executed in a way that, as far as possible, ensures **minimal disruption** to operations.
 - **Scaling and future roadmap:** Build on successful initiatives and plan for **long-term growth** and **innovation**. Firstly, determine which successful initiatives can be **expanded** across the organization, then develop a **roadmap** outlining **future projects**, considering the likely evolution of emerging technologies and market trends. Follow this by allocating **resources**, ensuring that necessary funding, personnel and technology are in place to support **scaling** efforts.

MediaTech Supplier in an IBM interview

*Measurement is imperative – you cannot know if something is **successful** if you cannot measure it. A lot of transformation programmes that I've seen are successful because they have an **active programme management** component to it and somebody ensuring that the blockers are being removed, conversations are being had that need to be had, deadlines are being met, and **appropriate measurements** are being taken.*

Steph Lone

Global Leader, Solutions Architecture
Media, Entertainment, Games and Sports IBU
AWS
(February 2025)

Planning and Measuring Transformation

Tracking deployment and engagement helps to drive successful transformation

- Successful transformation in MediaTech requires careful planning and measurable impact assessment. The first case study demonstrates how growth was driven by tracking key deployment metrics and expanding ecosystem access, while the second demonstrates that sustained user engagement, not just acquisition, is critical for long-term success.

Case Study 1: NDI

NDI, a fast-growing company that delivers the **NDI IP standard** for video, audio and metadata connectivity, tracked key metrics in 2024 to assess the impact of recent business transformations. One primary **KPI** that **NDI** tracks is the number of **NDI-enabled hardware and software nodes** across its ecosystem, encompassing both first-party and third-party implementations. With the changes implemented from 2023 to 2024, **NDI** significantly accelerated **YoY growth** in **NDI-enabled nodes** deployed. One key example comes from **third-party hardware** implementations - by phasing out the **NDI upgrades** program and expanding **full portfolio coverage** with **key PTZ camera partners**, the company **opened its ecosystem** to over 100,000 Professional PTZ Cameras already in use but **previously lacking NDI capabilities**.

Case Study 2: Strada

When **Slack** transitioned from its original incarnation as a failed video game project to a workplace communication tool, its transformation success was not initially measured by total sign-ups but by **daily active usage (DAU)**. Investors saw that users were engaging with **Slack** for several hours a day, signalling strong product-market fit. Similarly, **Strada**, a centralized platform for video production that enables collaboration, search and sharing for creative teams, initially struggled with engagement, as users only interacted with it weekly. The leadership team at **Strada** took inspiration from Slack's development and focused on **DAU** to guide **new feature development**. By refining its feature set to encourage more daily active use, **Strada** increased both **user retention** and monetization potential. This case highlights that **sustained engagement**, rather than just acquisition, is key to transformation success - businesses must focus on features that drive **frequent, valuable interactions** to scale effectively.



Transformation Challenges

Transformation Challenges

Transformation requires navigation of organizational, financial and technical challenges

- Organizations undertaking business transformation face **organizational, financial and technological challenges**.



Organizational:

- Resistance to change
- Legacy business tensions
- Talent shortages



Financial:

- Budget constraints
- New financial models
- Market competition & price pressure



Technological:

- Legacy infrastructure
- Transition complexity
- Interoperability

Transformation Challenges

Overcoming resistance, legacy tensions and talent gaps in transformation

- Organizational challenges** in business transformation include resistance to change, legacy business tensions and talent shortages, often requiring **cultural shifts** and **executive alignment**.
 - Resistance to change:** Both employees and leadership often **struggle to adopt** new workflows and mindsets, creating a significant barrier to business transformation. Many long-standing professionals in broadcast and media technology are deeply accustomed to **traditional workflows**, making it difficult to shift toward **cloud-based, software-defined, and data-driven** approaches. **Leadership hesitation** can also slow progress, particularly when there is a lack of clear top-down communication, goal-setting, and executive sponsorship for change. Overcoming this resistance requires **strong leadership** and a culture that encourages **adaptability** and **innovation** rather than clinging to legacy methods. According to results from IABM's Business Transformation survey, **resistance to change** is the overall second most important challenge to business transformation.
 - Legacy business tensions:** **Conflicts** and **communication issues** between traditional broadcast technology teams and newer digital-first teams can slow down transformation efforts. For example, **broadcast engineers**, accustomed to **hardware-based workflows**, may struggle to align with **digital teams** that prioritize **cloud, IP-based, and software-defined solutions**. This divide can lead to inefficiencies, duplicated efforts, and resistance to adopting unified workflows, exacerbated by **different risk profiles** and **working speeds** between traditional and digital teams. Bridging this gap requires strong leadership, cross-team **collaboration**, and **cultural shifts** to ensure that both sides work towards a common transformation strategy rather than operating in silos.
 - Talent shortages:** It can be hard to find skilled professionals for roles requiring expertise in **emerging technologies**, especially non-broadcast-specific **digital skills**. Traditional broadcast engineers often lack the necessary **digital-first skills**, while IT and software professionals may not have industry-specific knowledge of **media workflows**. This skills gap can slow down transformation efforts and increase reliance on **external consultants** or extended **training programs**. Addressing this challenge requires investment in **upskilling** existing staff, attracting new talent from **adjacent industries**, and fostering a culture of **continuous learning**.

GEP Insight

MediaTech Customer in an IABM interview

*Broadcast and digital engineers often **work in silos**, creating a persistent divide: OTT platforms use **modern, component-based paradigms like IMF**, while broadcast workflows remain rooted in **legacy, tape-based structures**. Even in file-based environments, traditional broadcast solutions follow **outdated methodologies**. Many vendors remain locked into these paradigms, resisting the flexibility and modularity of IMF. The industry must break down these conceptual barriers to **unify broadcast and OTT workflows**.*

Kemal Gorgulu

CTO

Arte

(November 2024)

Transformation Challenges

Financial constraints are significant challenges to transformation

- **Financial constraints** are significant challenges that can hinder business transformation, impacting **strategic decision-making**, **innovation**, and the ability to **invest in new technologies**.
 - **Budget constraints:** In the current challenging business environment, broadcast and media technology suppliers and their customers are increasingly facing significant **budgetary limitations** that hinder their ability to invest in business transformation: budget constraints were identified as the **overall biggest challenge** in IABM's Business Transformation survey, with nearly 80% of respondents including this category when asked about their biggest transformation challenges. Tight budgets due to **challenging market conditions** and **external macroeconomic factors** are restricting the capacity to fund **large-scale technology upgrades** or **transformation projects**. For instance, some traditional broadcasters are struggling to allocate sufficient resources for the **transition** from legacy broadcast systems to more **agile, digital-first platforms**. To address this, organizations should focus on **phased investments**, leveraging cloud-based services and subscription models to **reduce upfront costs**.
 - **New financial models:** The market is shifting toward new business models to remain competitive in an **increasingly digital** and **subscription-driven** environment. This shift requires a **careful balance of investments** in new technologies, such as streaming and digital content creation, while continuing to manage traditional revenue streams. Media companies must navigate **changing financial landscapes**, such as balancing **ad-supported models** alongside **subscription-based** models, **hybrid** models, or **pay-per-view** systems. These transitions require substantial **upfront costs**, and many companies are finding it a challenge to develop **new revenue streams** fast enough to offset these costs, slowing down their transformation efforts. Developing **diversified revenue streams** and experimenting with **flexible monetization strategies** can help ease this transition.
 - **Market competition:** In a highly competitive landscape, organizations must constantly **innovate** to differentiate themselves and stay ahead of competitors. **New competitors**, especially digital-first platforms like streaming services, are increasingly **challenging traditional business models**, forcing established players to keep pace with new entrants and evolving consumer behaviors. This competition drives the need for **significant investments** in technology and content, but **financial constraints** often limit the ability to respond fully. For instance, broadcasters may need to adopt **cloud-based** solutions, invest in advanced **AI-driven** content personalization, or develop original programming to compete with streaming services, all of which come with **high costs**. If companies cannot invest adequately due to financial constraints, they risk **losing market share** and falling behind more nimble competitors. To remain competitive, businesses should seek **strategic partnerships**, adopt **scalable technologies**, and focus on **differentiation** through unique content and services.

Transformation Challenges

Technical hurdles can slow the progress of business transformation

- Transformation to **digital-first, cloud-based and IP-enabled workflows** requires the navigation of **complex technical hurdles**.
 - Legacy infrastructure:** Many broadcasters still rely on **outdated, hardware-dependent** systems that lack the **flexibility** for modern digital workflows like **cloud-based production and IP broadcasting**. These legacy systems are **costly** to maintain and **slow** to upgrade, hindering innovation. A **phased migration** strategy can reduce risks, with **hybrid** solutions enabling gradual adoption of cloud and IP workflows while **maintaining** critical infrastructure **on-premises**. Investing in **virtualization** and **software-defined** solutions can also ease the transition and reduce reliance on aging hardware.
 - Transition complexity:** Migrating to modern digital infrastructures is **complex**, requiring cloud integration, automation, and a shift to on-demand content. This demands **training, operational restructuring**, and investment in **new tools**, often causing **disruption**. Without a clear strategy, companies risk **inefficiencies** and **service disruptions**. A well-planned roadmap with **staff training, pilot programs**, and **gradual rollouts** can ease the shift. **Partnering** with experienced technology providers can also help manage the transition effectively.
 - Interoperability:** With the rapid expansion of **digital media platforms**, **integration** between systems remains a **challenge** due to **proprietary technologies**. **Incompatibility** across formats, standards, and software can **create inefficiencies** and **increase costs**, especially when mixing legacy and modern systems. Adopting **open standards** like SMPTE ST 2110 and IMF can improve compatibility. Research feedback suggests that organizations should **prioritize vendor-neutral, API-driven solutions** and invest in **middleware** to unify workflows and enhance connectivity.

MediaTech Consultant in an IABM interview

*The transition to **IP** is more **protracted** than some of the vendors anticipated. A lot of media companies are under considerable **financial pressure** and there's not the levels of **investment** that might have triggered a mass integration in the past. But if you want to do all the stuff in the **software** domain and in the **cloud**, then your infrastructure has to be **IP**.*

Neil Maycock
Founder
NM Advisors
(October 2024)



Transformation Success

Inform. Connect. Support.
theiabm.org

Transformation Success

Leverage external insights and keep transformation simple and practical

Seek external expertise and best practices

Don't hesitate to **reach outside** of the broadcast and media industry for insights and solutions. Many of the challenges faced during transformation have been addressed **in other sectors**. Leverage your personal network and industry experts to understand what works and avoid common pitfalls. Learning from others' experiences can help guide your approach.

MediaTech Consultant in an IABM interview

*Look for **help** and look for **best practice**, potentially reaching **outside of our industry**. As unique as your business may feel, it's **not unique** and whatever problems you're facing have probably been **solved** multiple times in **other places**. So go out and learn how other people have done it and what **good looks like**.*

Neil Maycock
Founder
NM Advisors
(February 2025)

Prioritize simplicity and practical

Start with a **straightforward, actionable** transformation plan and **limit KPIs** to avoid unnecessary complexity. Focus on practical, achievable steps and ensure proper **documentation** to maintain continuity, especially when key personnel change. As transformation **evolves**, complexity can increase, but keeping the initial approach **simple** is crucial for success.

MediaTech Supplier in an IABM interview

*In business transformation, people often gravitate toward **complex** solutions, believing that complexity ensures the right outcome. However, this is usually a **mistake**. The best approach is to start with the **simplest possible solution** and allow complexity to develop only when truly necessary.*

Miguel Coutinho
VP of Operations & Strategy
NDI
(March 2025)

Transformation Success

Keep your workforce front and center during the transformation process

Support your employees through change

Understand that there may be **resistance** to change, and provide employees with continuous **support** and **training** to adapt to new technologies, structures and workflows. Offer educational resources and mentorship. Provide clear, consistent communication from leadership on how transformation benefits **individual growth** as well as the organization.

MediaTech Customer in an IABM interview

*We are now living in a **hybrid** world where the **IT sector** is **merging** with various industries, including the broadcast industry. For **broadcast** engineers, **reliability** is paramount, while **IT** professionals prioritize **flexibility** in development and testing. By **integrating** these two groups, we are building our infrastructure and achieving impressive results, enabling continuous **evolution** to meet consumer-centric needs.*

Paulo Rabello
Executive Director
Globo
(February 2025)

Invest in workforce skill development

Address **skill gaps** by investing in **upskilling** programs for existing employees and attracting new talent from adjacent industries. Ensure staff have access to training in **emerging technologies**. Encourage a culture of **continuous learning**, where staff feel **supported** and **confident** as they navigate the transformation process.

MediaTech Supplier in an IABM interview

*Generally speaking, I personally believe it's **easier** to train someone who already understands **broadcasting**, feels the pressure of **live production** and is familiar with those aspects, by **adding IP skills** to their knowledge, rather than recruiting new IP specialists and then teaching them how live broadcasting, video production and content creation work.*

Ronny van Geel
Director of Product Marketing
Grass Valley
(February 2025)

Transformation Success

Embrace openness and adaptability for transformation success

Adopt an open ecosystem approach

The future of the industry lies in **open ecosystems**. Avoid locking yourself into one vendor or solution. By adopting **flexible, interoperable** systems and **collaborating** with others, you can ensure that your transformation supports diverse customer needs. This openness allows for **innovation** and creates an environment where the **best solutions** can emerge.

MediaTech supplier in an IABM interview

*I think it's important that we all look at it as an **open ecosystem**, people don't like to be tied to a single vendor, so let's make sure we are as open as possible to **collaborate** with each other. Let's make sure that we don't all create our own ecosystem - if we don't approach it as an **open solution**, it will not serve the industry.*

Ronny van Geel
Director of Product Marketing
Grass Valley
(February 2025)

Challenge tradition and adapt to new realities

Holding on to traditional practices in a **rapidly evolving** landscape can be detrimental. Organizations should be willing to **abandon legacy systems** and processes that no longer serve them. The industry must **evolve** and **innovate**, and those who **embrace change** will thrive, while those who cling to the past risk falling behind.

MediaTech Supplier in an IABM interview

*It's **dangerous to defend tradition**. Believing a **resurgence** of our industry must look and work like it used to is a massive **risk**- and it could jeopardize everything. To make our industry **strong** requires a **new version** of our industry, and that is a much harder sell because people have a tendency to protect traditions.*

Michael Cioni
Founder & CEO
Strada
(February 2025)

Transformation Success

Organizational restructuring enhances agility and efficiency

- NEP Europe and Telia Company restructured to boost efficiency and agility. NEP's cluster model improved resource-sharing and service, while Telia's media divestment sharpened its focus on connectivity. Both streamlined operations to strengthen market leadership and competitive positioning.

Case Study 1:

NEP Europe restructures

In February 2025, **NEP Europe** restructured into three regional clusters to boost collaboration, efficiency, and resource-sharing. This **unified approach** streamlined project delivery, customer engagement, and internal development. Previously, regional teams had **inconsistent integration**, slowing responses and limiting resource use. **Centralized leadership accelerated decisions**, improved **service consistency**, and enhanced **agility**. Experienced country leaders preserved local expertise while leveraging **shared resources**. This transformation ultimately **strengthened NEP's support** for local and pan-European clients.

Case Study 2:

Telia divests media assets

Swedish telecoms and mobile operator **Telia** divested its TV and media assets, including Sweden's **TV4** and Finland's **MTV**, to **Schibsted Media** in February 2025 to refocus on its core telecommunications business. Acquiring these media properties in 2019 had expanded **Telia's** reach, but managing content production alongside its traditional services proved challenging. With increasing **competition** from global tech giants, **Telia** opted to return to its strengths in providing world-class connectivity. By shedding its non-core assets, **Telia** strengthened its **strategic positioning** and freed up resources to invest in network infrastructure and digital services.

Transformation Success

Cloud-Powered transformation enables scalability and innovation

- Hearst Networks EMEA and Corrivium used cloud solutions to streamline operations and scale. Hearst modernized its media supply chain with AWS, while Corrivium enhanced live streaming with AMPP. Cloud innovation improved efficiency, flexibility and growth.

Case Study 1:

Hearst Networks' modernization

Hearst Networks EMEA modernized its media supply chain from November 2023 onwards by migrating to AWS and adopting SDVI's Rally platform. The transition addressed challenges tied to outdated on-premise infrastructure and siloed workflows, which hindered scalability and efficiency. By moving to the cloud, Hearst Networks gained increased agility, improved collaboration across regions, and enhanced transparency in content operations. The integration of AI tools further optimized compliance and distribution workflows. This transformation empowered Hearst Networks to quickly adapt to industry shifts, accelerate innovation, and maintain an efficient content supply chain across multiple linear and VOD platforms.

Case Study 2:

Corrivium's live transformation

Corrivium leveraged Grass Valley's AMPP platform to enhance its live OTT streaming services. The adoption of this cloud-based infrastructure allowed Corrivium to dynamically scale resources, simplify workflow customization, and optimize real-time event management. Prior to this transformation, managing multiple global broadcasts was resource-intensive and inefficient. AMPP's flexibility enabled seamless live event production, reducing operational complexity while improving content quality. The integration allowed for rapid deployment of production-ready systems, significantly enhancing efficiency and client satisfaction. This shift positioned Corrivium as a more adaptive and competitive player in the live streaming sector.

Transformation Success

Digital tech and optimization enable broadcast and media company transformation

- Optimizing operations and leveraging digital tech drive success in broadcast and media company transformation. Case studies from ITV and Sky show how transformation boosts profitability and engagement: ITV's efficiency program strengthened margins despite revenue decline, while Sky's cloud platform enabled cost-effective innovation.

Case Study 1:

ITV's digital efficiency & growth

ITV's profits soared in 2024 thanks to record performance from producer-distributor **ITV Studios** and major cost savings totalling £60m, of which £20m was delivered through ITV's £150m efficiency programme and £40 million was attributed to the “ongoing transformation and efficiency programme”, which has enabled ITV to fund “growth investments, offset inflation and improved our margins”. The broadcaster plans to deliver a further £30m of non-content cost savings in 2025. **ITV's transformation** focused on **streamlining costs** while **expanding digital revenues**. **Digital advertising** and **streaming growth** also ensured **ITV's success**, accelerating ROI, while **strategic investments** and **efficiency improvements** allowed ITV to offset challenges and **strengthen its market position**.

Case Study 2:

Sky's cloud transformation

Sky's cloud transformation showcases best practice in **scalable content delivery**. Partnering with **AWS**, Sky developed a software-defined encoding (SDE) platform using **Amazon EKS**, streamlining operations across multiple regions. This innovation enabled **rapid scaling**, **cost efficiency** and new audience experiences, such as **multiple camera angles** for F1 coverage and **expanded sports content**. The **cloud-native** approach improved **disaster recovery**, reducing failover times from hours to minutes while enhancing **system reliability**. Sky's shift from on-premises hardware to **AWS-managed services** accelerated **content innovation**, optimized **resource utilization** and ensured reliable, high-quality **delivery**, positioning the company for **future advancements in digital broadcasting**.