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ChainTracker™ Executive Summary

IABM Business Intelligence Unit

18 April 2026

About this Report

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- *This report features data from the IABM MediaTech Industry Tracker survey conducted by IABM, as well as a wide range of expert interviews led by IABM's Business Intelligence Unit with both media technology vendors and end-user organizations.*
- *This report is a modular chapter taken from the full length ChainTracker™ 2025 report to provide an executive summary spanning all nine ChainAnalysis categories used to organize the media supply chain. A sector-led focus is applied within each chapter to highlight insights that relate specifically to Sports, News, and Cinematic Studio production.*
- *The full-length report is comprised of nine chapters that analyze technology and business trends in each Content Chain segment of the media supply chain, and a Snap Insights chapter that provides an executive summary of key insights across all categories. The full-length report or additional single chapter licenses are available on request.*

ChainTracker™ report 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.

Trackers research family

Our tracking research spans four types of trackers

- IABM tracking research comprises the three types of trackers listed below. This report presents the findings of the ChainTracker™, analyzing trends through the lens of content sectors – Sports, News and Studios – by each Content Chain segment of the media supply chain.

ChainTracker™

Analysis of trends in different segments of the content supply chain as well as sectorial analysis, including sports, news and cinematic studio productions

GeoTracker™

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

TechTracker™

Analysis of trends in different tech sectors covering five technologies (IP, Cloud, AI/ML, OTT & Streaming, Remote Production)

IABM Research Streams

The structure of the Business Intelligence Service

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State of MediaTech

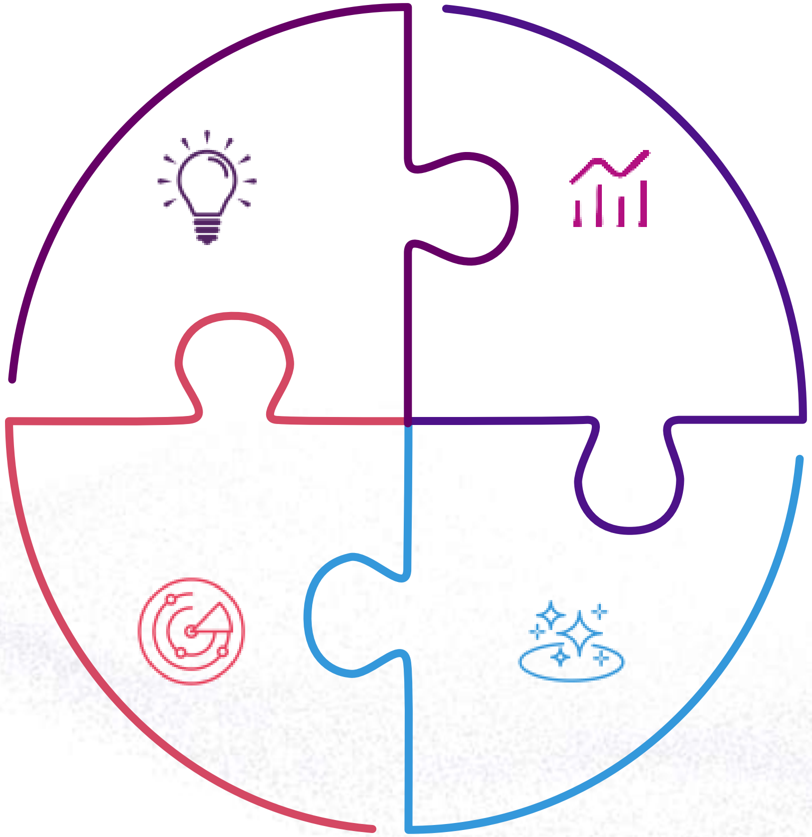
Strategic analysis of MediaTech sector

NAB 2024	IBC 2024
NAB 2025	IBC 2025

MediaTech Radar

Blogs and newsletters focusing on spotlight topics in MediaTech

Jan	Feb	Mar	Apr	May	Jun
Jul	Aug	Sep	Oct	Nov	Dec



Trackers

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

GeoTracker	TechTracker
ChainTracker	

Megatrends

Analysis of major trends that are fundamentally changing MediaTech

Democratization	Business Transformation
Security	Game Industry Convergence

Note: the dimmed reports are yet to be published connect | support | inform

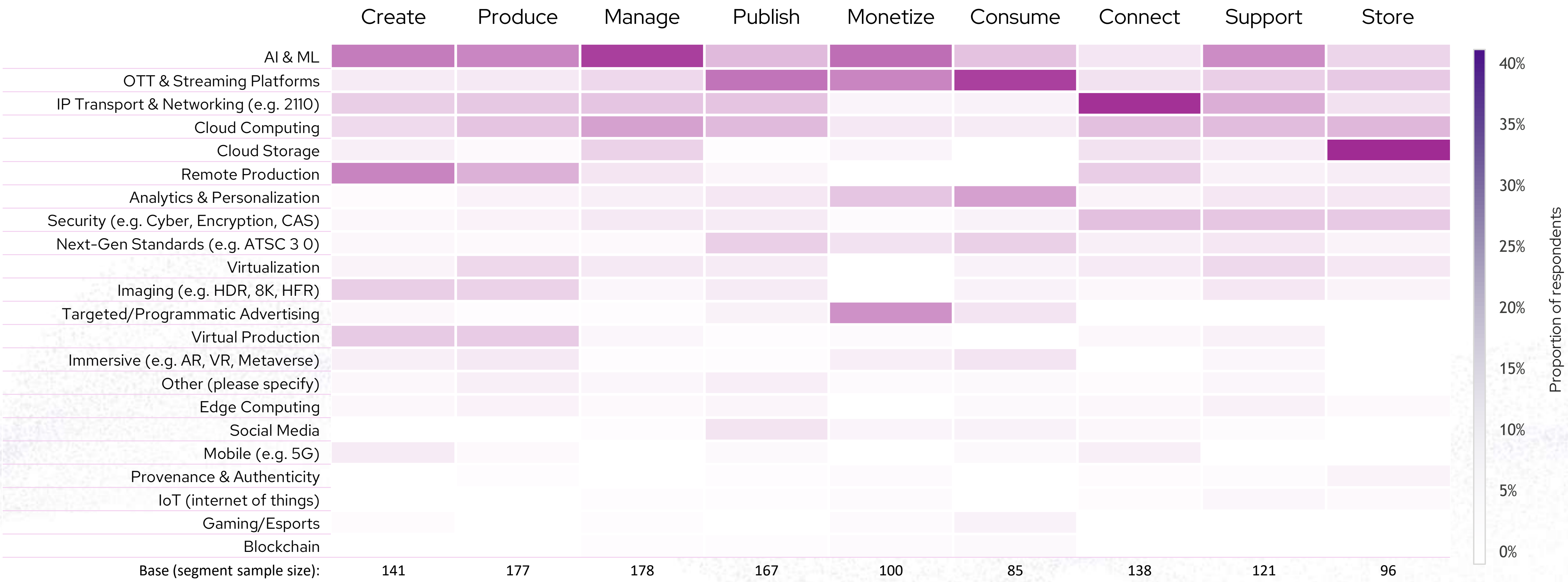
Snap Insights

Key learnings from the research

18 April 2026

Snap Insights

Technology investment drivers across the content supply chain



Q. Please select the most important technological drivers of investment in each of the following content supply chain segments. Multiple response question. Period: FY2025

Source: IABM MediaTech Industry Tracker

Snap Insights

Key investment drivers and challenges across the content chain

	Key Market Driver	Key Tech Driver	Key Challenge
Create/Produce	Demand for live content is driving the adoption of hybrid cloud production.	Automation and remote production are accelerating use of consumer-grade cameras.	Tariffs and the democratization of MediaTech are causing price pressure.
Manage	Scalability and efficiency achieved through cloud and a unified IP-based infrastructure.	AI-generated metadata tagging is enabling real-time analytics and searchability.	Demand for digital sovereignty is changing the way how MAM implementations are done.
Publish	Advanced streaming protocols enable live streaming at low latency to multi-platforms.	Cloud-based playout and live OTT are increasingly done through managed services.	Growing network load is translating into rising ISP and CDN costs, lowering margins.
Monetize/Consume	AI-based analytics are enabling hyper-personalized fan and ad experiences.	Immersive, interactive live experiences on multiple platforms diversify revenue streams.	Monetization of mobile experience is challenging due to powerful social media.
Connect	Best of breed solutions allow a flexible infrastructure and control over cloud costs.	Shift towards modular software architecture is enabled by containerization, cloud and IP.	Quality of linear engineering capabilities is decreasing due to focus on IT skills.
Support	AI-driven video and audio monitoring is anticipating risks in real-time.	Cybersecurity and Zero Trust architectures improve resilience and data provenance.	Security, piracy and geopolitics are increasing risks and slowing down full cloud migration.
Store	Hybrid storage is proving scalability, while on-premises help predict costs.	Time Addressable Media Store (TAMS) technology is promising cost savings.	Cloud costs and recent outages of public cloud service providers raise concerns.

Source: IABM

Snap Insights

Broadcast is evolving as more content is distributed on digital platforms

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French YouTuber acquired exclusive online broadcast rights of the French U21 national team – press release

I am proud to announce the acquisition of the rights to the France U21 national team until Euro 2027. This offer complements the free football broadcasting approach we started this summer with the Saudi Pro League. I am passionate about football and continuing to change the codes and trying to broadcast football differently are things that drive me. I thank the partners [YouTube, Twitch, Free] and those who made this possible.

Zack Nani
Social media influencer and content creator
Zach Nani Prod
(October 2025)

Technology Vendor speaking at IABM Impact Stage during IBC 2025

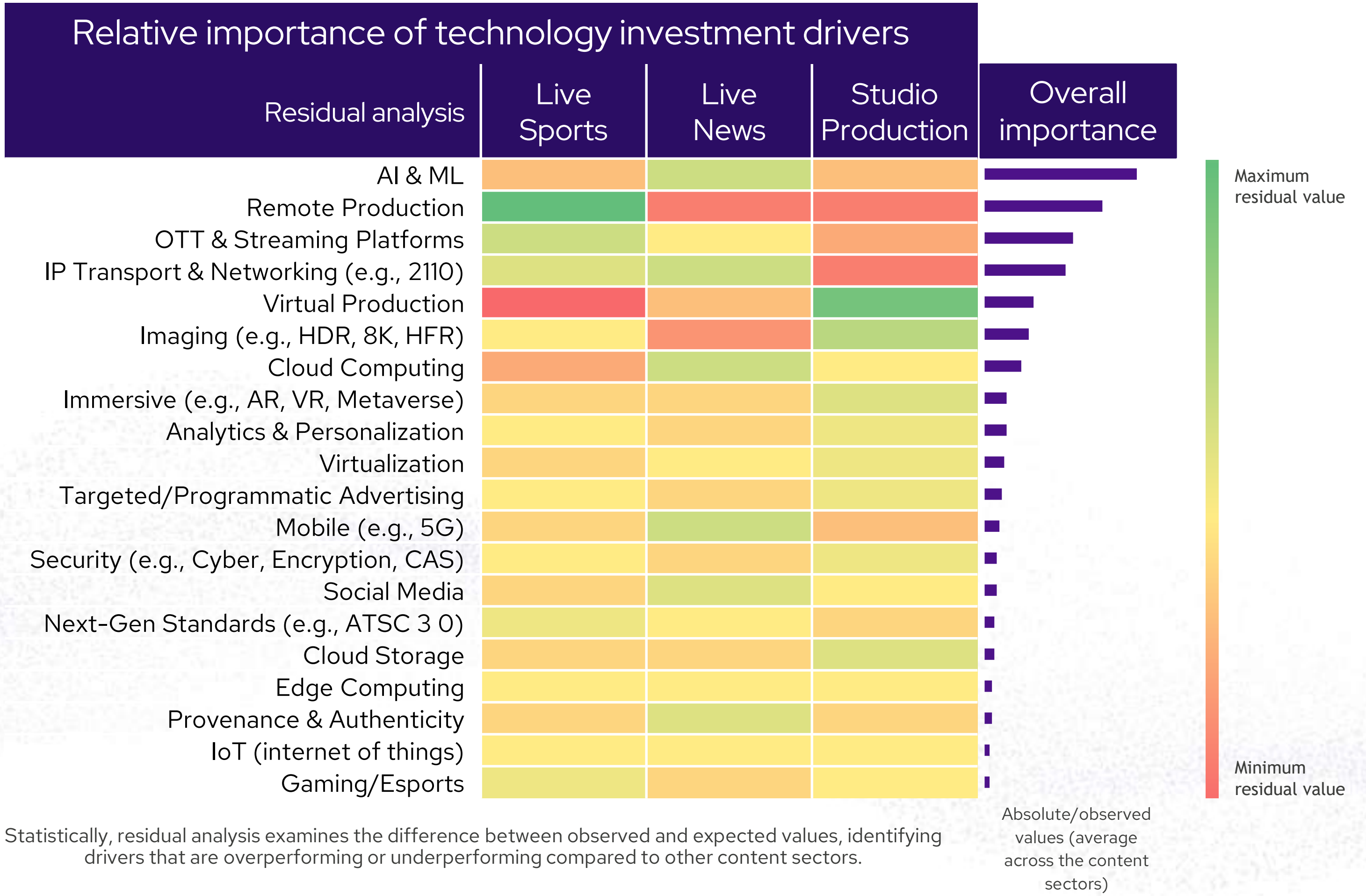
The challenge [for broadcasters] is those consumers haven't just gone to streaming, a lot of them are also going to platforms like YouTube. [...] It's been noted that the average age of the Channel 4 viewer on their streaming service is one generation younger [than the linear viewer]. On YouTube that's two generations younger. By being on YouTube and engaging there, broadcasters are actually not cannibalizing their views on TV, but bringing people back on their content.

Justin Gupta
Head of Broadcast & Video Ads
Google
(September 2025)

Source: IABM, Company Filings

Snap Insights – Content Sectors

Newsrooms explore provenance and mobile; live sports invests in REMI



Statistically, residual analysis examines the difference between observed and expected values, identifying drivers that are overperforming or underperforming compared to other content sectors.

Analysis of residuals helps to identify niche or emerging technologies relevant to a certain sector, even though their overall importance may be moderate or low.

In this heatmap, despite remote production being among the top four technological drivers of investment across all content sectors, live sports heavily relies on this technology. Meanwhile, emerging or niche technologies such as provenance and authenticity, mobile (e.g. 5G), and social media that are relevant to news despite the moderate absolute value (e.g. 3% for provenance and authenticity in news).

Source: IABM MediaTech Industry Tracker

Snap Insights – Sports

Key investment drivers and trends in Sports

- The growing demand for live sports streaming, from premium to niche sports, is driving investment in multiple camera categories, including drones and professional PTZ cameras, to create more perspectives and unique feeds. Remote production has become a widely adopted technology enabling distributed operators to cover more live sports events and connect to a centralized IP-based backbone – while access to growing files enables editing to take place simultaneously with the live event. Hybrid and live cloud production is bringing significant efficiencies in the production of lower tier sports as well as increasingly in the premium tier, enabling production teams in different geographies and time zones to work from home – saving travel costs and improving productivity.
- Cloud-native media asset management platforms using AI to automate workflows and metadata tagging are revolutionizing the generation of highlights packages and real-time analytics – including biomechanics analysis through RFID chips attached to players on the field – as well as data-driven training optimization for sports clubs. AI-powered analytics are also enabling hyper-personalized fan experiences on multiple devices and improving monetization opportunities through dynamic content recommendations and contextual ad targeting.
- Sports venues are increasingly used to create multi-modal live experiences which attract new audiences on social media platforms. For example, the Super Bowl half time performances featuring popular singers as well as brand-influencer collaborations happening "behind the scenes" at the stadium are driving viewership before, during and after the “Game Day”. Media businesses are increasingly using virtual production studios, augmented reality (AR), virtual reality (VR), interactive fantasy apps as well as influencer streams to create multimodal and multi-platform fan engagement.
- Major streaming services are increasing their coverage of live sports, pushing up that prices paid to win media rights for top tier sports. Broadcasters are responding to fierce competition by splitting sports rights with other broadcasters and by shifting to cover lower tier and niche sports, using hybrid and live cloud production. Major streaming services with larger budgets to invest are focusing on AI-powered analytics and fan engagement as well as partnering with sports leagues and the creator economy to engage new audiences.
- Recent advancements in streaming protocols, compression technologies and cloud computing, has made latency less of a concern for live streaming services. However, scaling requirements and audience growth, combined with sports fans’ demand for real-time analytics and betting increase risks of disruption and subscriber churn.

Source: IABM

Snap Insights – News

Key investment drivers and trends in News

- News organizations are suffering from continuous cost pressures due to decline in viewership and linear advertising revenues, as viewers shift to consume news on digital platforms and social media in new formats such as short form videos and video podcasts. Broadcasters are prioritizing cost-effectiveness, efficiency and investing in automation to produce more content with the same or less resources. The capabilities of mobile journalism are being advanced by cloud workflows, enabling individual journalists to create, edit and publish content independently, on site, at speed. Increasingly powerful smartphones and their high-quality cameras have matured the adoption of consumer-grade equipment throughout the news media supply chain.
- AI-based, automated metadata tagging is increasing the speed at which journalists can search and track assets, reformat and prepare content depending on the distribution platform. End-users are prioritizing format-agnostic and application-independent MAMs and solutions that enable a story-centric approach, avoid duplication and unify editorial workflows. Having one single centralized management platform reduces time-to-market to multiple platforms.
- Fake news, disinformation and Gen-AI content are a growing concern for news organizations, driving investment in content provenance and authenticity (e.g. C2PA) to preserve audience trust. Broadcasters adopting cloud and software-defined workflows are increasingly worried about cybersecurity as well as digital sovereignty due to recent changes in the geopolitical environment. As a result, public cloud service providers are launching European sovereign clouds, which operate separately from their globalized cloud infrastructure (e.g. AWS' German cloud).
- News broadcasters are investing in modular and scalable software-driven studios to ensure efficient media asset management and collaboration in the global content supply chain. The adoption and native support for many IP standards is enabling scalability and future upgrades of software, which allows media businesses to respond faster to changes in the rapidly evolving market.
- Broadcasters now need to sell ads across multiple platforms. AI-based analytics tools are helping broadcasters to collect and process data from multiple platforms and sources such as CTV apps, social media engagement and linear TV ratings, and providing real-time insights which platforms are gathering the most viewers per event and topic.

Source: IABM

Snap Insights – Studios

Software is driving global collaboration and automation

- Production of high-end feature films and scripted content continues to move away from traditional production hubs like Hollywood and New York to new regions such as Latin America, Asia Pacific and new locations in Europe, driven by growing demand for local content and production incentives and tax benefits introduced by national governments. Movies remain a key driver of streaming subscriptions, however by making titles available for home viewing on streaming services sooner box office revenues are suffering from reduced theatrical windows.
- The on-going consolidation and recent acquisitions of production studios by streaming services signal the importance of intellectual property (IP) rights of older hit movies and TV series as well as IP of gaming characters, accelerating the convergence between film and gaming sectors. For example, Warner Bros. Studios' *A Minecraft Movie* became the biggest movie of 2025 in terms of revenue generated in the opening weekend.
- Production studios are virtualizing and moving to software-defined workflows to drive efficiencies, automation and productivity in their globalized production supply chains now consist of various local studios in different geographies, remote teams, freelancers and the freelance creators. Production studios are moving to hybrid cloud architectures to deploy AI in the automation of metadata tagging – significantly improving search and discovery of their content libraries – and repetitive tasks especially in post-production workflows and media asset management. Cloud workflows are enabling distributed teams and freelancers to access content remotely and collaborate in real-time – this is accelerating turnaround times and the content's time to market.
- The adoption of AI in content production took a significant leap forward in July 2025, when a North American technology firm Moonvalley launched Marey, an AI video-generation model customized for professional filmmakers and production studios. Agentic AI is also being tested in the film industry. For example, industry experts reported that Agentic AI could soon enable thematic and emotional analysis of historic characters and develop models about their behavioral evolution and "personal growth" for future movies, augmenting storytelling.
- The creator economy is increasingly challenging traditional production studios in terms of content quality and popularity, attracting audiences with shorter scripted content and micro dramas optimized for mobile viewing. Film studios – responding to the competition and rising production costs – are becoming more open to using consumer-grade equipment and collaborating with influencers and individual creatives.

Source: IABM

Snap Insights

Content supply chain is converging, focusing on profitability

MediaTech Supplier in an IABM Business Intelligence Interview

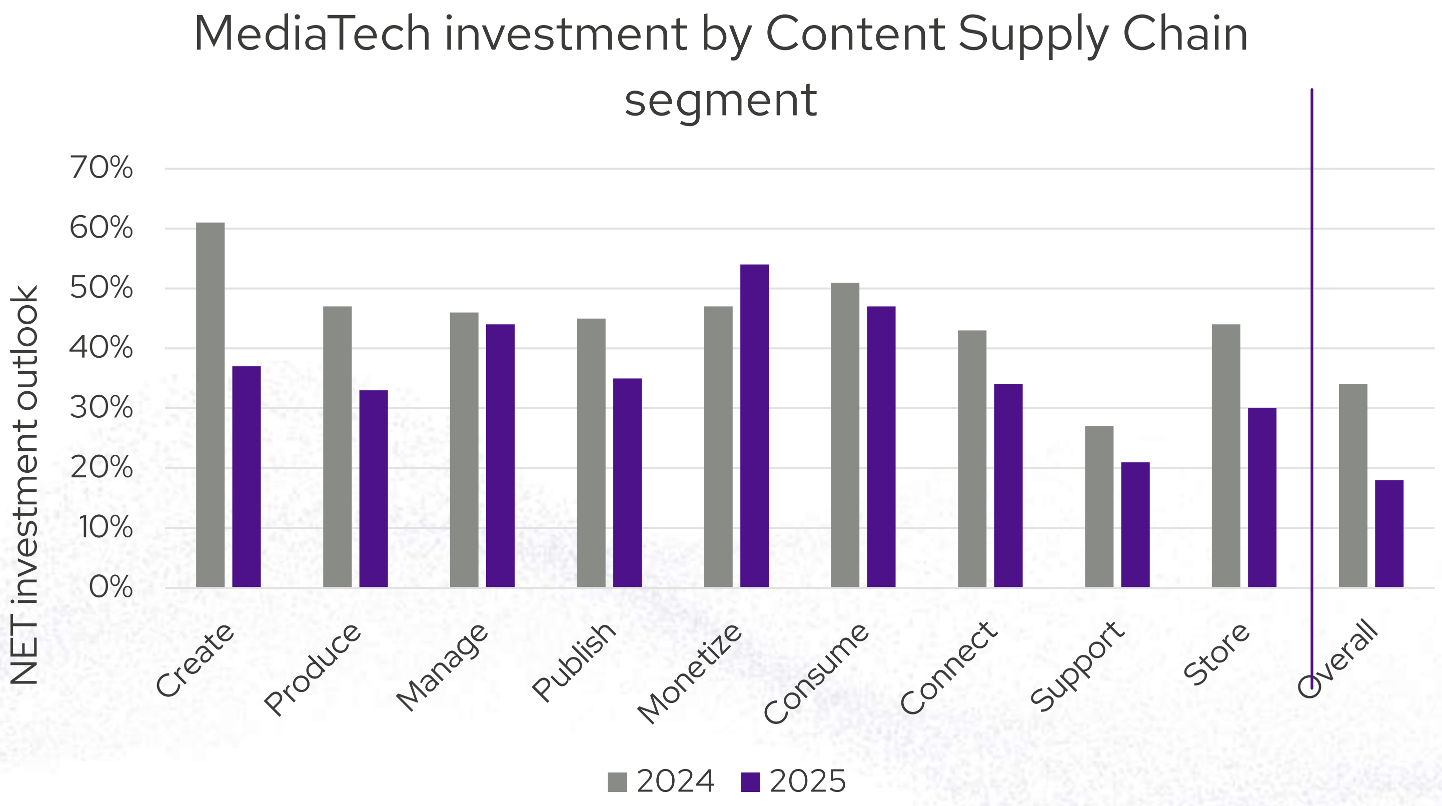
> *The lines between content segments [business wise] are blurring, because of a lot of merging and acquisition that happened over the last decade and ability to reach out to the consumer and get control over who is consuming your content, how they consume it, and monetize that.*

Michael Demb
Vice President of Product Strategy at TAG Video Systems,
Co-Chair Low Latency Workgroup of Streaming Video Technology Alliance
(November 2025)

Source: IABM

Snap Insights

Investment outlook in MediaTech became more conservative in 2025



Q. What do you predict will happen to your organization's media technology budget over the next year? Q. How is technology investment in the following content supply chain segments changing? (Media technology buyers).
The NET Investment Outlook and NET Investment Priorities are the difference between positive and negative sentiments.

Source: IABM MediaTech Industry Tracker

The overall MediaTech investment outlook became more conservative in 2025 due to economic pressures, geopolitical tensions, and new US trade tariffs. Broadcasters responded by prioritizing automation to boost yields amid volatile ad revenue. Total cost of ownership emerged as the primary factor in media technology purchasing decisions, overtaking innovation, which led buying decisions in 2024. M&A activity serves as a key lever for content supply chain convergence. With a greater presence across the supply chain, vendors can tap into consumer relationships to control consumption and monetization.

Create, Produce and Store are the most affected segments of the content supply chain. Create has been affected by the new tariffs more than the other segments due to greater reliance on hardware components. AI and cloud-based remote production is driving investment in create and produce as media companies are rationalizing spendings. the transition to software-defined workflows is a major driver of investment in software-defined, cloud, and hybrid storage architectures.

Monetize is the only segment, where investment outlook has slightly improved compared to the previous year's outlook, driven by AI automation and personalization.