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# State of MediaTech

IAMT Business Intelligence Unit

April 2026

[theiamt.org/biu](https://theiamt.org/biu)

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## Our reports are produced based on a hybrid research approach

IAMT's research reports leverage 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.

## Definitions of respondent segmentation used in this report



### All Industry



#### Media Technology Vendors

Organizations whose business mainly entails supplying media technology products such as software and hardware to media/production companies.



#### Media Technology Suppliers

A combined grouping of organizations from both the Media Technology Vendor and Media Technology Service Provider Category.



#### Media Technology Service Providers

Organizations whose business mainly entails services supplying media technology services such as playout and outside broadcast to media/production companies.



#### Media Technology Buyers

Media/production companies, media technology service providers and other organizations who have decision-making power about investment in media technology – responsible for or influence/participate in such decisions.



#### Media/Production Companies

Organizations whose business mainly entails using media technology products and/or services for producing, managing, and/or distributing content to consumers.



#### Other Organizations

Organizations and independent experts who do not fall under any of the categories above, primarily consulting and education/training.

The MediaTech market hasn't slowed down. It's become more selective.

## Growth remains, but it is harder to win



Fewer buyers are increasing budgets, and growth is concentrating into fewer, larger opportunities where proving time to value is critical.

## Budgets are tightening across the market



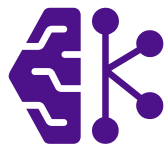
A growing proportion of buyers expect flat or reduced spend, with increased scrutiny on cost, flexibility and commercial models.

## ROI has overtaken innovation as the key driver



Total cost of ownership and measurable outcomes now dominate purchasing decisions over new features.

## AI remains the top priority, but must deliver value



62% of organisations are investing in AI/ML, but expectations have shifted from experimentation to clearly defined use cases and measurable return.

## Core infrastructure must be optimized

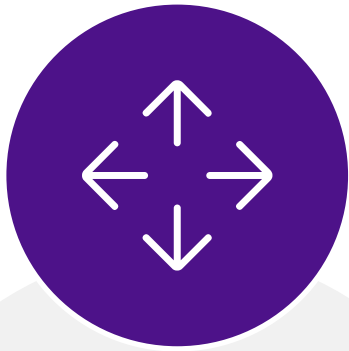


Remote, IP, cloud and OTT are baseline capabilities, with competitive advantage shifting to integration, efficiency and operational execution.

## Agility, evaluation and trust now define success



These are no longer strategic themes, but the conditions required to compete and win.



## Agility

Agility is no longer a differentiator, it is the baseline for operating in a market defined by volatility, cost pressure and the need for speed.



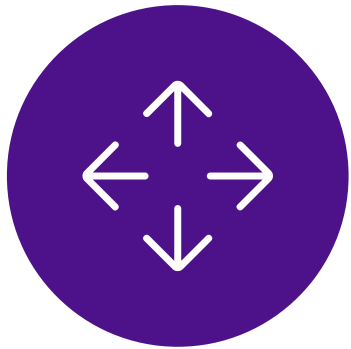
## Evaluation

In a constrained market, every technology decision is judged on measurable outcomes, with ROI and total cost of ownership now driving investment.



## Trust

Trust is no longer a brand value, it is a commercial differentiator in a market shaped by AI, authenticity and risk.



## Agility

**Agility is no longer a competitive advantage, it is the minimum requirement to operate in a market defined by volatility, cost pressure and the need for speed.**

- In a volatile macro-economic environment, organisations need to adapt quickly to changing market conditions. Agility is enabled by flexible systems and processes that can scale up and down to optimise resources and cost.
- Buyers are increasingly avoiding vendor lock-in, favouring SaaS and on-demand models that allow them to innovate with lower upfront risk. At the same time, cost pressure is driving the need for greater control, leading to the adoption of FinOps and more disciplined operational management.
- Cloud availability is now expected, with operators demanding seamless experiences across on-premise and cloud environments. Suppliers must provide flexibility without compromise.
- Software-defined, scalable solutions are enabling suppliers to expand into new vertical markets. To compete, vendors must offer flexible commercial models and modular solutions that allow customers to scale investment efficiently.



We definitely see need for speed and faster time to market.



**Marc Bruce**  
CEO, Encompass

## Transformation



## Evaluation

**Every investment is now under scrutiny, with ROI and total cost of ownership defining which technologies get adopted and which do not.**

- In a constrained market, MediaTech buyers are placing greater emphasis on measurable outcomes. Total cost of ownership and return on investment are now the primary drivers of decision-making.
- Transformation is no longer driven by large-scale, speculative investment, but by continuous evaluation, shorter feedback loops and more targeted deployment of technology.
- Suppliers must clearly demonstrate value, with AI, automation and workflow innovation tied to specific use cases and measurable benefits.
- Solutions that provide visibility into performance, cost and utilisation will be increasingly favoured, as buyers look to optimise spend and justify every investment decision.



## Trust

**Trust is no longer a brand value, it is a commercial differentiator in a market shaped by AI, authenticity and risk.**

- The rapid advancement of generative and agentic AI is reshaping how audiences engage with media. As AI becomes embedded in content creation, audiences are increasingly questioning what they see and where it comes from.
- This shift is not a rejection of AI, but a demand for transparency. Trust is becoming a defining characteristic of premium content, with audiences placing greater value on authenticity, provenance and reliability.
- Trust is equally critical in B2B relationships. As buyers operate under greater scrutiny, vendor reputation, reliability and clarity of roadmap are becoming key factors in procurement decisions.
- Technologies that enable provenance and authenticity, such as content credentials, are becoming essential across the supply chain. Suppliers that can embed trust into both their products and their delivery will be better positioned to win and retain customers.



Teams that treat restraint, ethics, and audience trust as creative inputs will stand out as premium and principled.



**Steph Lone**

Global Leader – Solutions Architecture, AWS

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There are plenty of opportunities if you're willing to be agile and you do need to be agile [...] you need to have the expertise and the relationships with the customer so they are confident that when you say you can deliver something they have the confidence that you can deliver it and it will work.



MediaTech Supplier

# Business Environment

[theiamt.org/biu](http://theiamt.org/biu)

Creating and sharing video has become a daily occurrence. Not only is audio visual media a source of entertainment, but it is also a fundamental means of communication, and a source of data.

What were once specialized tools for the acquisition, production and distribution of broadcast media have now become accessible to more end-users than ever before due to a process of technology democratization.

Mobile devices and open-source software have lowered the barrier to entry for independent content creators and the development of media supply chains in a diverse range of market verticals. Social media and video sharing platforms like YouTube and TikTok have provided a platform for anyone to publish audio visual content to a global audience. This is expanding the addressable market for MediaTech products and services.

MediaTech vendors have for many years engaged with multiple market verticals selling products and solutions to end-users in corporate, government, education and many more parallel markets alongside media and broadcast. However, the cultural-shift catalysed by the COVID-19 pandemic at the beginning of this decade has intertwined the application of audio/visual technologies with digital transformation investment and advanced audio/video literacy in the global workforce.

While the media and broadcast business has experienced increased turbulence due to the combined impact of macro-economic and sector specific challenges, MediaTech vendors have been able to build resilience by diversifying their revenue sources across a broader range of verticals.

A new generation of media buyers have now entered the workplace with an elevated understanding of media creation due to greater exposure and confidence developed throughout their education and lifestyle. This cultural change has opened up more creative and technical ambition across all market verticals.

The transformation of IABM into IAMT (International Association of Media Technology) reflects this change to our members' business as products and services are designed with a larger addressable market of buyers in mind.



Adjacent and peripheral markets offer opportunities to apply existing knowledge and experience into new verticals.



IAMT MediaTech Tracker Respondent

## Redefining the customer – if anyone can be a broadcaster, does every organization need a media supply chain?



To provide IAMT members with access to data that quantifies the market opportunity in the media & broadcast vertical as well as parallel market verticals, the MediaTech Industry Tracker features questions relating to vendors' source of revenue.

While "parallel" or "adjacent" markets is an effective umbrella term for referring to customer groups beyond the media & broadcast vertical, for effective customer identification, product development, and go-to-market strategies, further segmentation by market vertical is required.

In 2026 the IAMT Business Intelligence Unit has conducted a review and update to the vertical market taxonomy used in the MediaTech Industry Tracker incorporating feedback from vendors and primary research on-site at shows such as InfoComm and Integrated Systems Europe. The following pages features the categories used in this new taxonomy to segment parallel market verticals with a breakdown of each segment's coverage.



We have a subsea company in the North Sea, we have an international hotel chain [as customers] – which was surprising to us – but the world is full of video now.



**André Torsvik**

EVP Operations, Mimir (FonnGroup)

## Venues & Stadiums

- Stadiums & Arenas
- Convention & Exhibition Centers
- Conference Centers
- Bars, Pubs & Clubs
- Event Venues
- Theatres
- Cinemas
- eSports Venues
- Museums & Visitor Attractions

## Places of Worship

- Megachurches
- Religious Broadcast Facilities
- Churches, Temples, Mosques, Synagogues

## Temporary Event Installations

- Temporary Outdoor Events
- Music Festivals

## Corporate

- Banks & Financial Institutions
- Commercial Offices & Enterprise Workplaces
- Small and Medium Enterprises
- Startups
- Not-for-Profit and Charitable Organizations
- Corporate Training Centres

## Sports Clubs & Federations

- Sports Clubs
- Sports Federations

## Video Games

- Video Game Developers
- Video Game Publishers
- Video Game Consoles

## Gambling & Arcades

- Casinos
- Betting Shops
- Arcades & Interactive Entertainment Centres

## Government

- National/Federal Government
- Regional/State Government
- Local/Municipal Government
- Judiciary & Courtrooms

## Military & Emergency Services

- Military & Defense
- Emergency Services (Excluding Healthcare)
- Emergency Response Command Centers

## Education

- Higher Education (University/College)
- K-12 (Primary & Secondary Education)
- Libraries, Archives & Research Institutes
- Media Schools
- College Sports

## Healthcare & Medical

- Biopharmaceuticals & Research Labs
- Hospitals (Public & Private)
- Clinics & Outpatient Centers
- Medical Device Manufacturers
- Medical Education & Training Facilities
- Telemedicine and Healthcare Broadcast Studios

## Other

- Industrial & Manufacturing
- Security
- Recreation & Leisure
- Transportation
- Retail
- Residential
- Other

## Media Technology Suppliers

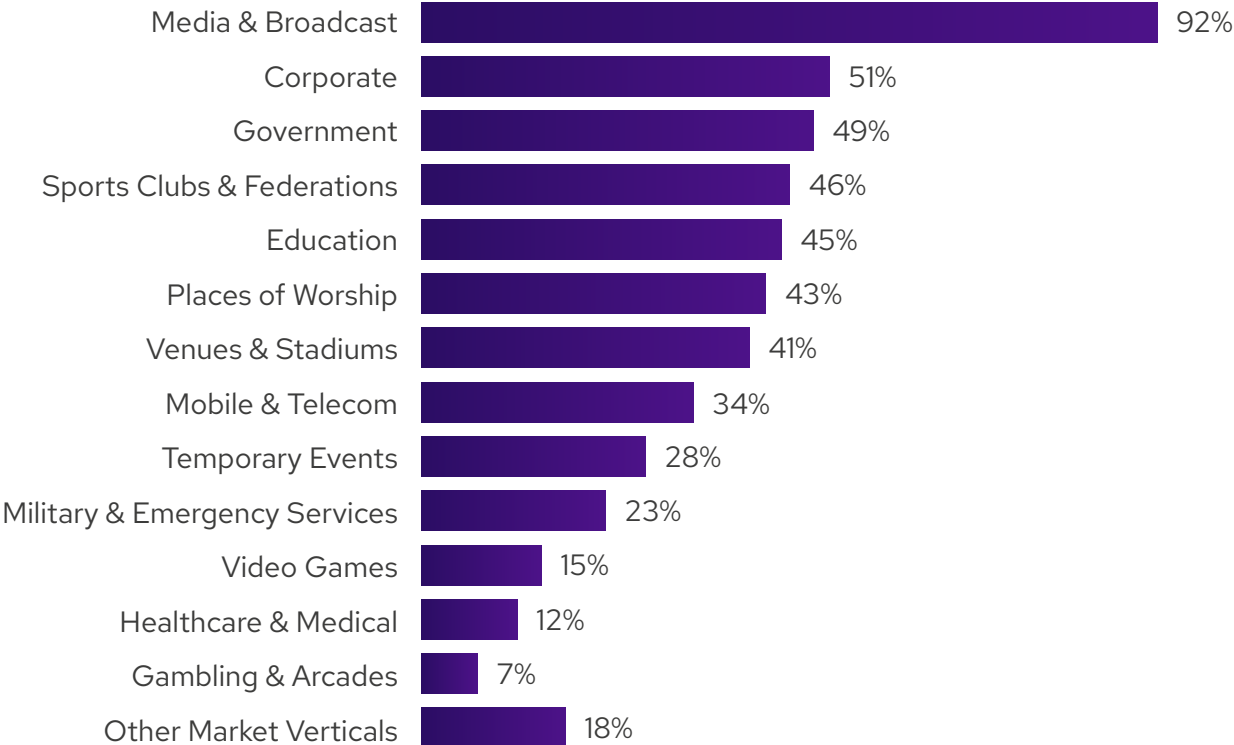
Applying the updated market vertical taxonomy in the first 2026 wave of the MediaTech Industry Tracker provides visibility of the number of MediaTech suppliers serving each vertical. Inevitably, media & broadcast stands out as the most common source of revenue among respondents. However, only 11% of the sample selected only media & broadcast, demonstrating that the majority of MediaTech suppliers count on generating revenue from other customer groups as well.

On average MediaTech suppliers generated revenue from five different verticals (including media & broadcast) indicating that vendors are already diverse in terms of servicing a range of different market verticals. MediaTech suppliers that are currently serving fewer verticals could cultivate new business by targeting additional verticals.

As the percentages represent the proportion of respondents generating revenue from these vertical segments, it could be inferred that higher ranking verticals like corporate, government, sports clubs & federations, education, and places of worship offer more opportunity for MediaTech vendors, however greater competition will be present.

To achieve successful market penetration when entering new market verticals, MediaTech suppliers need to tailor their go-to-market to fit the relevant applications within the target vertical.

### MediaTech Suppliers' Revenue Segmentation by Market Vertical



Q. What are your organization's revenue segments?  
(Media technology suppliers, Q1 2026, n=74)



# Mapping Application to Vertical

To capitalize on the opportunity presented by the expanded addressable market, MediaTech suppliers need to map how their products and services will be used by different customer groups. The table below demonstrates an approach that can be taken by product and business development managers to map media solutions that they offer to the likelihood of usage in other vertical markets.

IAMT’s Vertical Market Taxonomy can provide a common and consistent terminology for suppliers to structure and plan their efforts. Using IAMT’s taxonomy can create alignment when preparing multivendor solutions and developing new partnerships by leveraging an approved taxonomy with clear definitions of category coverage.

MediaTech Solution	Media & Broadcast	Corporate	Government	Sports Clubs & Federations	Education	Places of Worship
<b>File-Based Video Production</b>	✓	✓	✓	✓	✓	✓
<b>Multicamera Live Event Production</b>	✓		✓	✓	✓	✓
<b>Multicamera Live Studio Production</b>	✓	✓		✓	✓	
<b>Digital Signage (including Ads)</b>				✓	✓	✓
<b>Multi-Campus Video Connectivity</b>	✓	✓	✓		✓	✓
<b>Auditorium Scale Video Conferencing</b>		✓	✓		✓	
<b>Industrial &amp; Analytical</b>	✓	✓	✓	✓		

Expected frequency of use case: Common Occasional Rare

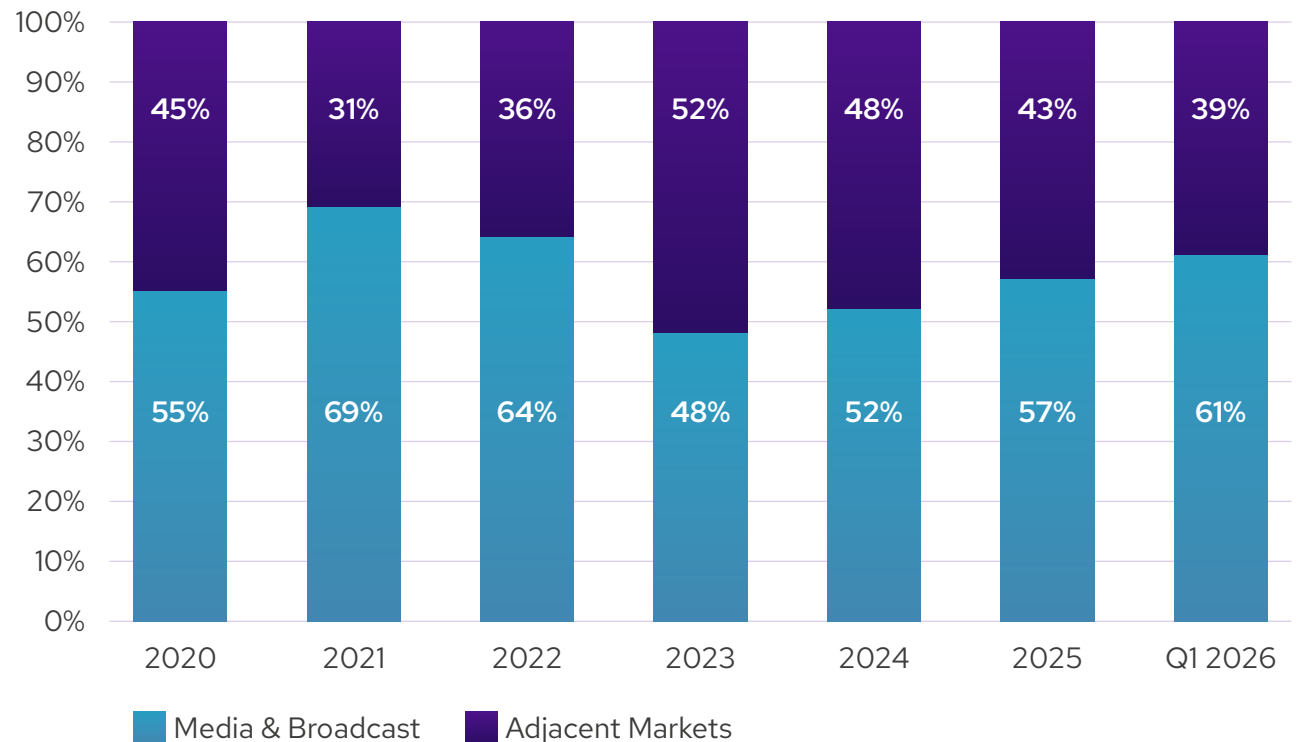
  **Media Technology Suppliers**

IAMT's MediaTech Industry Tracker provides insights into how MediaTech suppliers' sources of revenues have changed over time. The average share of MediaTech suppliers' revenues that is attributed to media and broadcast has risen in Q1 2026 compared to 2025. This follows a consistent trend in the improving health of media and broadcast revenue for suppliers as an aggregate, following from the negative impact of the WGA and SAG-AFTRA strikes in 2023.

The improvement in the overall average share of revenues attributed to media and broadcast is a positive sign for MediaTech suppliers that rely heavily on this vertical market. However, overall revenue growth can be accelerated further by pursuing net new growth beyond media and broadcast in parallel markets.

One third of MediaTech suppliers now generate at least half of their revenue from parallel markets. MediaTech suppliers servicing parallel markets recognize a growing investment in the connect product/service category (moving content within and between facilities). Over 80% of MediaTech suppliers that claim the majority of their revenue from parallel markets feature IP technology in their products and services. MediaTech suppliers that have developed networked IP solutions can productize this technology for a range of different end-users across vertical markets, increasing their overall market opportunity.

**Average % share of MediaTech Supplier Revenues by Source**



Q. What percentage of your company's revenues are derived from sales to broadcast and media customer types (broadcasters, streaming platforms, etc.)? (MediaTech vendors and service providers, n= from 35 to 125)

The most common challenge for MediaTech suppliers to sell to parallel markets (beyond price sensitivity) is a lack of resources. This was followed by lack of experience and the need to align marketing to different audiences.

Building relationships with new channel partners can help overcome these challenges. Value add channel partners with experience and established relationships within a new target vertical can provide additional resources and expertise to penetrate market verticals that they specialize in. MediaTech vendors that want to broaden their customer base should evaluate their current network of distributors, systems integrators, and resellers, to ensure that they have the necessary coverage to reach the end-users that they are targeting and identify gaps where new partnerships are needed.

New training for marketing and sales teams is needed to align their messaging to the specialized requirements of media buyers in different verticals such as education, and government. Investing in market research can improve an organization's understanding of target customer groups and provide the insights needed to convert more business. However, due to the pressure of reduced revenue from existing customers in media & broadcast, investment in training may be deferred. If an organization's media & broadcast revenue base is consistently declining, it is critical to invest in the operational transformation needed to effectively sell into parallel markets before it is too late.

Although MediaTech buyers in parallel markets will have unique considerations based on their specific market vertical, a common trend is the need for MediaTech products and services to be presented as solutions. Decision makers and influencers in the purchase decision making process will typically have a vision of the outcome that they are looking to achieve but be far more limited in the technical knowledge of what is required compared to a typical media and broadcast customer.

MediaTech suppliers should focus on building the confidence and trust of prospective buyers by establishing a framework that their sales channel can use to guide new MediaTech buyers to the right products and services that they need to achieve their desired outcome.

To deliver end-to-end workflows as solutions, suppliers may need to establish new partnerships with other vendors and service providers. As a not-for-profit trade organization, IAMT provides a neutral environment to facilitate peer-to-peer networking and collaboration. Participating in working groups, and networking with other members can support partner identification.

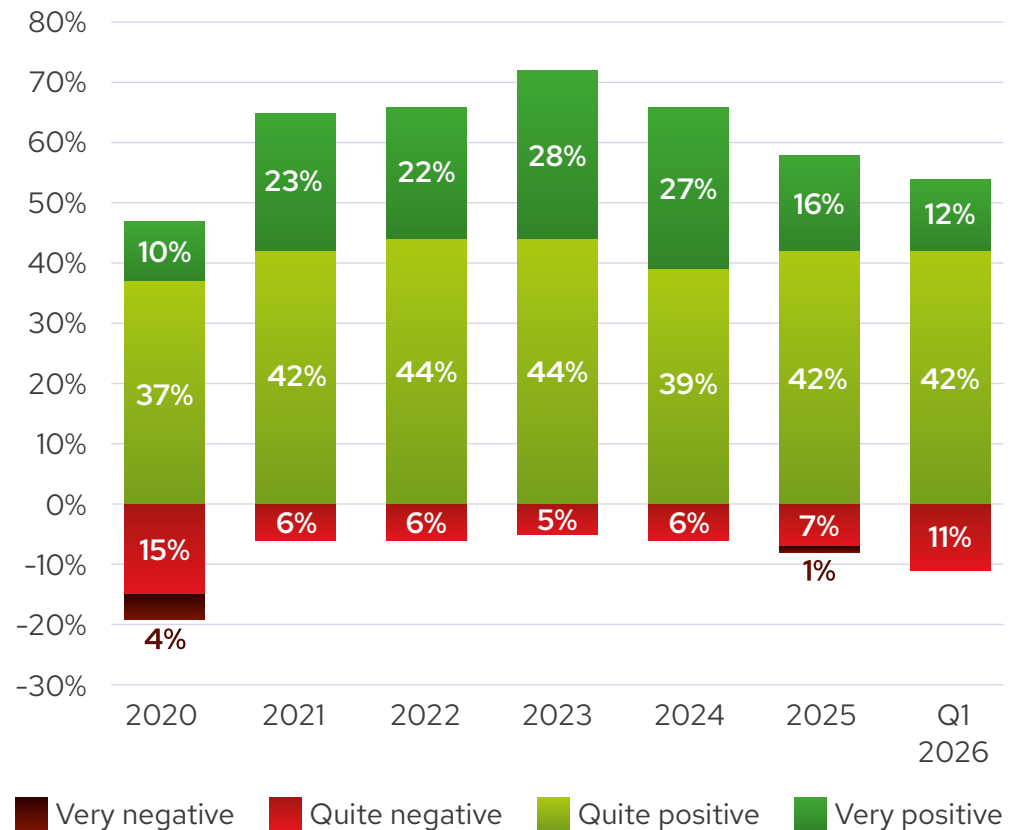
All Industry

The overall business environment outlook has trended downwards since 2023, the year the industry emerged from the COVID-19 pandemic era. Annual decline in Q1 2026 vs 2025 is driven by a 4%-point drop in very positive scores and a 4%-point increase in negative scores. Respondents citing a negative outlook in 2026 pointed to global macro-economic issues and fragmentation of supply and demand, leading to reduced profit margins and increased operational risk. In this environment decision making by both MediaTech buyers and suppliers requires proven return on investment to support it.

The decline in business confidence is primarily driven by media technology end users, while MediaTech vendors' outlook has remained relatively stable and more optimistic than that of this end-user group. In early 2026, 17% of end users reported negative business confidence (compared with 13% in 2025). The larger proportion of end-users with a negative outlook was driven primarily by television broadcasters. In contrast, production companies show an opposite trend: 32% expressed a very positive business environment outlook this year compared with 20% in 2025. While broadcasters face challenges in pivoting their business model, production companies can pivot quicker to serve increased demand from parallel markets and produce video for enterprise clients when media and entertainment business slows.

With the downturn in overall business environment in 2026 led by television broadcasters, media suppliers should expect more conservative buying habits and greater risk aversion from this group. Buyers within this group need solutions to help transform their prospects. Business development teams at MediaTech suppliers should focus on providing guidance to buyers by foregrounding the benefits their solution can provide to their total cost of ownership, or migrating to a more agile supply chain.

## MediaTech Business Environment Outlook



Q. What is your organization's outlook for the overall business environment over the next year? (All Industry, n = from 170 to 387)



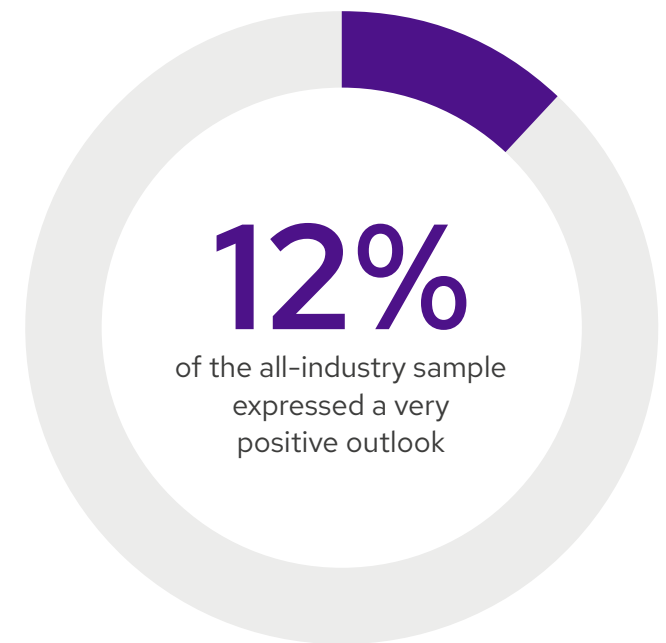
## All Industry

The “very positive” sentiment is primarily driven by MediaTech vendors and companies whose customer base extends beyond the media and broadcast industry. The global nature of these businesses partially explains their resilience: companies with a very positive business environment outlook operated in three regions on average, while companies with a negative outlook were active in two regions on average. Organizations with a very positive outlook are also more likely to use distributed workflows, with all work conducted remotely.

The shift from broadcast and linear TV to IP, streaming, and CTV (connected TV) is one of the key drivers of the positive business outlook in Q1 2026. The share of positive sentiment related to this theme in the IAMT MediaTech Industry Tracker has grown from 5% in 2024, to 21% in 2025, and to 33% in Q1 2026. This trend supports broader market developments showing structural changes within media companies, with revenues increasingly moving from traditional linear TV toward digital and streaming platforms.

Companies that have embraced this market shift have become more resilient and express stronger confidence in the overall business environment. Organizations that are still specializing in linear service delivery need to act fast to develop a presence in the OTT video supply chain to protect their future business.

The analysis of the organizations with a very positive outlook indicates that serving a diverse range of market verticals leads to a stronger business outlook. The evolving market landscape in media and broadcast has created pressure for organizations that remained aligned closely to traditional broadcast and linear TV. Leadership teams need to ensure that they have planned business transformation programmes that can unlock new markets either within media and broadcast, new regions or new verticals to build a pathway to a positive business environment outlook.



Q. What is your organization’s outlook for the overall business environment over the next year?  
(All Industry, Q1 2026, n=189)

## All Industry

The negative business environment outlook is primarily driven by media companies, particularly those operating linear businesses. Consumer viewership and advertising budgets continue to migrate steadily from linear TV to OTT and streaming platforms. Traditional broadcasters are experiencing a sharp divergence in their financial performance: linear television advertising revenues are flat or declining, while direct-to-consumer (DTC) and streaming segments are demonstrating robust revenue growth and expanding margins. For example, Paramount's revenues decreased by 3% year-on-year in 2025, driven primarily by an 11% decline in advertising revenue, while affiliate and subscription revenues increased by 4% year-on-year due to higher streaming subscription fees. Disney's linear networks experienced a 12% year-on-year decline in their 2025 fiscal year, while the revenue of its DTC segment grew by 8%.

This trend has motivated media organizations to redirect investment from linear services into their OTT services.

As a result, MediaTech suppliers need to focus on winning market share in this category of growth, to offset declining revenue available from servicing linear TV channel operation.

The challenge for media organizations that have not diversified extensively beyond their linear TV services is that the OTT streaming landscape has now matured with both localized and global services competing for audiences in all nations. The scale and buying power of global streaming services backed by technology companies that do not depend solely on media service income, such as Amazon Prime Video and Apple TV+ can be an imposing force for more traditional broadcast operations to compete with.

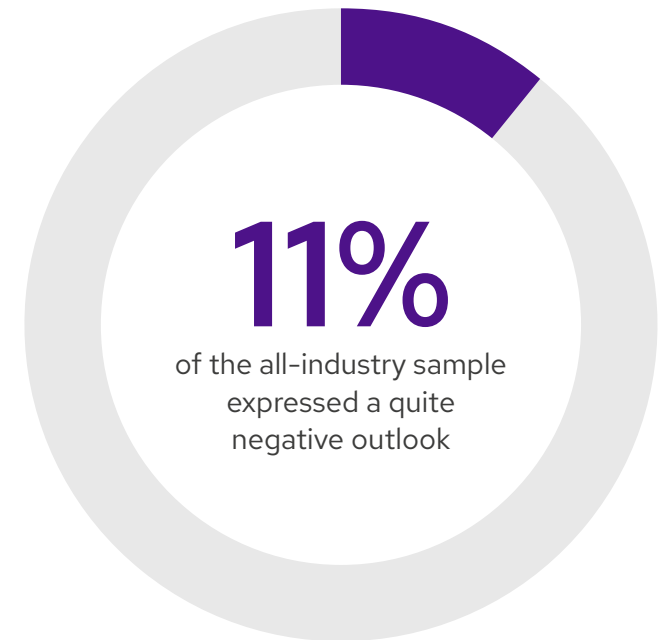
However, with audiences looking for trust in reliable media outlets, the heritage of broadcast reliability and quality editorial is now an asset these organizations should capitalize on to reassert their relevance. However, survival will ultimately depend on rapid transformation towards more agile operating models.



The industry is shifting toward a fragmentation of supply and demand, which entails a reduction in margins and an increase in operational risk.



MediaTech Supplier



Q. What is your organization's outlook for the overall business environment over the next year?  
(All Industry, Q1 2026, n=189)

## Media Technology Suppliers

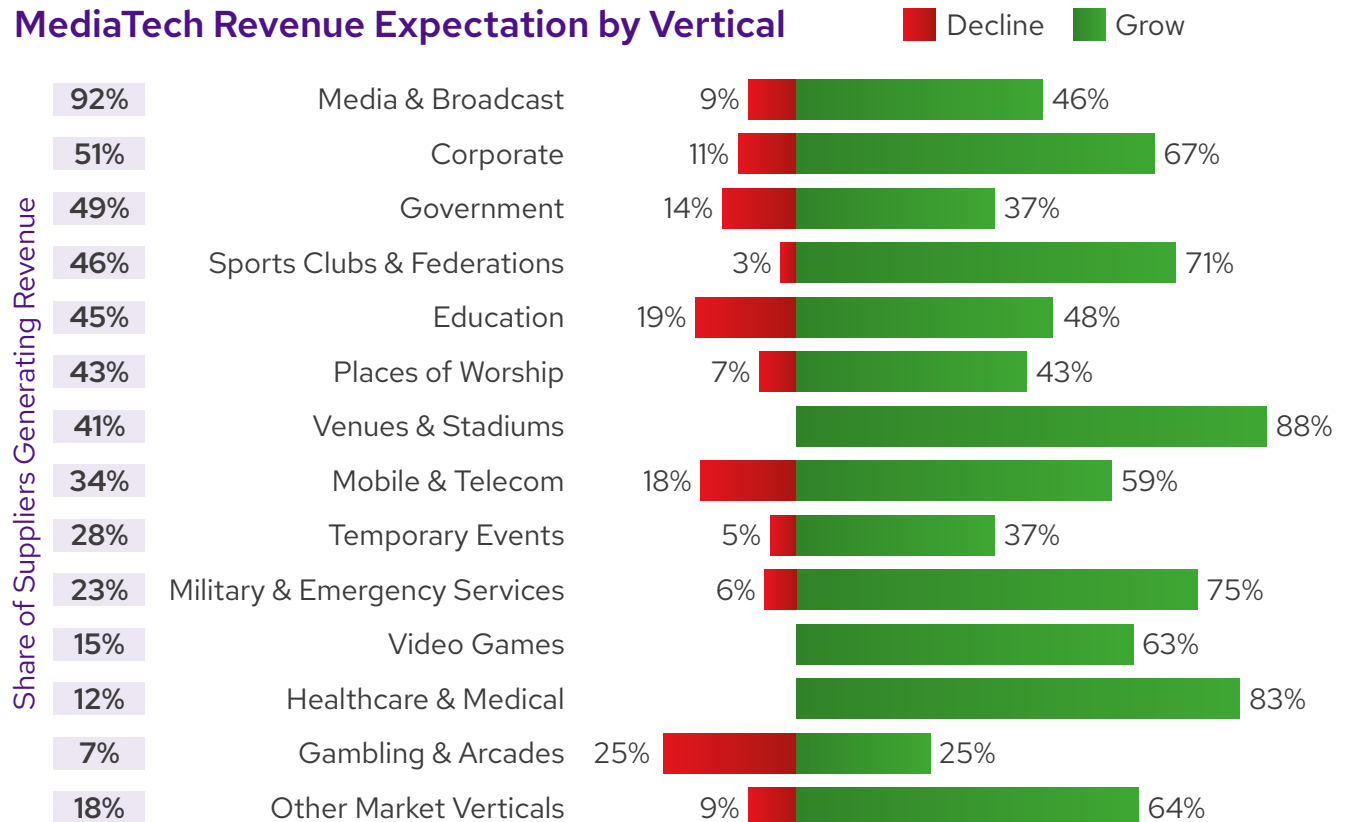
MediaTech suppliers that are facing a negative outlook in their established market verticals should evaluate if there is opportunity for them to develop net new revenue growth by entering new verticals.

Overall, venues & stadiums (88%), healthcare & medical (83%), and Military & Emergency Services (75%) were identified as the top three performing market verticals in terms of the proportion of respondents generating revenue in these markets that expected to achieve revenue growth in the given vertical in 2026 vs 2025.

Although government is the third most commonly served vertical by MediaTech suppliers, there is a more conservative expectation for growth (37%). On the other hand, healthcare & medical could represent a strategic opportunity vertical as there is a more limited proportion of suppliers (12%) active in the vertical, yet expectations for growth (83%) are strong among them.

Entering into new market verticals successfully requires investment in business development, tailored sales and marketing, and new partnerships. Evaluation and market research is critical preparation for leadership teams to launch successful market entries in new verticals that will deliver a return on investment and generate profitable business.

### MediaTech Revenue Expectation by Vertical



Q. How do you expect your company's total revenue derived from sales to each of the market verticals that you serve to change in the present calendar year compared to the previous? (Media technology suppliers, Q1 2026, n= from 5 to 68)

Market volatility and quickly changing competitive dynamics remain persistent within the media and broadcast vertical due to the continued contention between prestige media brands, and streaming services operated by technology companies such as Amazon and Apple. Independent content creators, and content marketing from organizations in parallel markets also contribute to an abundance of media vying for consumers' attention.

The market landscape is reshaping itself as broadcasters and streamers conduct strategic overhauls of their media services at an accelerated rate to keep pace with evolving audience behaviors that are influenced both by generational change and innovation in consumer technology. Meanwhile, organizations in parallel markets invest in creating in-house media supply chains to integrate content production into their daily operations.

Digital advertising continues to make gains over traditional linear network advertising, but is far more fragmented. Media organizations need to own a presence in more spaces to accumulate revenue. The dominant assumption is that audiences want everything, everywhere, all at once.

The risk to media organizations is in striving to achieve this and trying to repurpose content across as many platforms as possible, they are spreading themselves too thin. Successful media creation now depends on data. In the saturated media landscape curation and recommendation are expected to retain attention.

Advances in AI are proving effective in refining how organizations leverage their analytics and convert this data into personalization. In multiplatform environments being able to unify engagement data between platforms and apps adds more dimension to how organizations communicate and enables media services to identify higher value advertising inventory to be sold.

The growth of the creator economy presents a vision for individuals to build their own career outside of the traditional media and entertainment system, and provides a space for thought leaders in other verticals to build their voice and personal brand in their industry. However, due to the volume of aspirational creators, and limited revenue offered by the social media platforms, creators discover that as they scale brand partnerships become essential.



Now that we have YouTube, the competition is not among the broadcasters themselves, but between individual persons and social media. The amount of content is huge.



**Takumi Yamaguchi**

Japan Professional Football League

The relationship between organizations and user generated content is changing. Rights holders have realized they can harness the passion of independent creators to extend the universe of their brand IP through fan communities. In other verticals “employee creators” can provide the talent and skillset to introduce media usage within the organization and even build the foundations of in-house media supply chains.

Recognizing YouTube’s strengthening position as the most watched TV platform globally as per Nielsen Gauge data, media businesses and sports leagues are entering partnerships with YouTube, reflecting a change in media organizations’ attitude towards digital platforms, seeing the potential for amplification rather than cannibalization.

In Q1 2026, the BBC announced a partnership with YouTube, to debut programmes on YouTube. This follows a series of deals with broadcasters including Channel 4 (Q2 2022), ITV (Q4 2024) and Sky TV (Q1 2025).

Through these partnerships, YouTube is solidifying its position in the media landscape as a destination not only for user generated creator content but also premium content from established media brands as they seek to reach different audience demographics as well as generate additional international revenue by distributing their content via YouTube.

Growing demand for live content is making social media platforms invest in media rights of premium sports and live events. Recently, YouTube announced two major rights deals – FIFA World Cup 2026 and the Oscars Academy Awards 2029 – which will make premium live content free for fans and global audiences, attracting new advertisers and driving engagement with these live events on multiple platforms.



Building on our success in the living room, we’re driven by the simple belief that TV should be easy. We’ll soon launch fully customizable multiview and more than 10 specialized YouTube TV plans spanning sports, entertainment and news – all designed to give subscribers more control.



**Neal Mohan**  
CEO, YouTube

Algorithmically-led vertical video players provide viewers with low-effort, high-volume viewing optimized for mobile. The interactive dynamic of quick scroll-based skipping allows platforms to quickly refine the content they serve to the individual developing a more personalized feed of content that attracts habitual viewing.

The success of vertical video feeds is evidenced by the increase in advertising revenues generated by Google and Meta since launching YouTube Shorts, and Instagram Reels to compete with TikTok. Meta's full year 2025 results reported 22% annual growth in advertising revenue reaching a total of \$196bn. Growth was largely attributed to advertising revenue generated by Instagram Reels. Over 50% of Instagram's advertising in the US was run on the Reels vertical video player in 2025 due to the success of the format. Similarly, remarks were made by Google's parent company Alphabet on the importance of YouTube Shorts in contributing to record setting advertising revenue of \$40.4bn in 2025, a 12% year-on-year growth in YouTube's annual global advertising revenue.

The combined success of vertical viewing on TikTok, Instagram Reels, and YouTube Shorts has been a reflection of audiences' desire to consume shortform video in an interactive mobile first format.

Ad placement on YouTube shorts and Instagram Reels are driven by AI that has been effective in increasing relevance and in return the boost in ad engagement and conversion has allowed vertical short form video to become high value advertising inventory.

While media organizations are experimenting with making more of their content library available on third party digital platforms, like YouTube, efforts are simultaneously being made to deliver comparable vertical viewing experiences within their own apps and streaming services. First party platforms will remain the most desirable destination to grow viewership for full ownership of audience and advertising data.

Plans for the integration of vertical players into leading global streaming services Disney+ and Netflix during 2026 have already been announced. Disney noted how the initial launch of their offering "Verts" will focus on content discovery, highlighting that the short visuals would allow users to explore the Disney+ catalog in a way that reflects habits built on other content discovery platforms, like social media. The announcement also hinted at opportunities to host UGC (user generated content), noting that creator content could be added to showcase the creativity of their many brand IPs' respective fandoms.

Future developments of vertical video noted by Disney could also include experiments with new storytelling formats and personalization.

Vertical video should not be viewed as a direct threat to at home living room watch by appointment viewing but utilized as an opportunity for additional engagement and brand/story interaction. The challenge for most media organizations is how to integrate a pipeline for vertical video content into their existing supply chain without major duplication.



Putting live vertical streams and clips on social platforms helps with content discovery and captures viral moments in real time – reaching audiences where they're already engaged. Having more vertical content in their existing apps also provides viewers with an experience that feels more mobile-friendly.



**Regina Rossi**

Head of Product, AWS Media Services

# Paramount Skydance Acquires Warner Bros. Discovery

In October 2025 Warner Bros. Discovery (WBD) announced that the company would take offers for acquisition following from reported interest from multiple parties. The media organization houses streaming and studio business and owns household media brands including HBO and CNN as well as the rights to Harry Potter and DC Comics. However, under the leadership of CEO David Zaslav had been unable to mitigate debt accumulating from legacy network services and had previously announced a plan to split out its cable networks from its streaming and studio businesses. At the time of the announcement WBD held a market value of over \$45bn, despite holding billions of dollars of debt.

The sale of WBD became a defining topic of Q4 2025 and Q1 2026 as both Paramount Skydance and Netflix submitted a series of offers competing for ownership of the media giant's assets, although with different interests. Paramount's offer bid for complete ownership of all of WBD, while Netflix positioned a more targeted offer focusing on just the profitable streaming and studios businesses, leaving behind legacy network assets.

After a deal worth \$82bn was agreed with Netflix in December valuing shares at \$27.75, a hostile takeover bid was launched by Paramount's CEO David Ellison which ultimately resulted in Warner Bros. accepting a deal made by Paramount in February, that offered \$31 per share in cash for the complete organization for total valuation of \$111bn.

Negotiations concluded as Netflix stepped away from the deal choosing not to compete with this offer, reflecting the importance of evaluation. While Paramount were able to win the bidding war for WBD, critics highlight the challenge that stands before Paramount to achieve return on their investment, with particular consideration to the debt taken on not only from WBD's business but also to prepare their cash offer.

Following successful regulatory and shareholder approval strategic review and consolidation of assets is expected leading to operational change at a significant scale across established Paramount Skydance and WBD media supply chains. Due to the scale of these media organizations the impact is anticipated to be comparable to Disney's merger with Fox.

This process will evidence how agile media supply chains have become. The structure and architecture of both Paramount and WBD's media catalogs and services will determine how quickly assets can be aligned. As buying and selling media organizations becomes more commonplace amid the consolidation of the media and broadcast vertical, embracing technology that can give media assets and supply chains greater portability can aid sales and acquisitions moving forward.



We said all along this opportunity was a nice-to-have at the right price, not a must-have at any price.



**Spence Neumann**  
CFO, Netflix

Inevitably, the prospective sale of Warner Bros. Discovery led to scenario forecasting of the long-term industry impacts of acquisition by Netflix and Paramount Skydance to determine which would create a better outcome for the overall health of the theatrical film business.

Netflix's feature film release strategy to date has used limited theatrical releases to qualify titles for award submission and for special "event" cinema such as sing-along screenings of K-Pop Demon Hunters and showcasing the two-hour finale of episodic series, Stranger Things. Concerns were raised that the sale of WBD to Netflix could redirect WBD's theatrical feature film production predominantly towards streaming.

This became a key focal point in negotiations leading both Netflix and Paramount to pledge that they would preserve WBD's prestige feature film production and guarantees of minimum theatrical release windows for feature films. This has spotlighted the need to constantly evaluate the theatrical window to respond to changing audience behaviors. Media organizations have to carefully consider how long titles should remain theatre exclusives before being made available on streaming services to optimize revenue across both box office and video on demand services.

Global box office results were reported to increase by 6% year-on-year in 2025 to achieve a total of \$3.5bn by Gower Street Analytics. This marked the second highest annual result since the COVID-19 pandemic, and just 1% below the leading year 2023. Studios depend on a strong slate of feature length films entering production to ensure there is a draw for audiences to visit cinemas. The annual result was buoyed by the success of Chinese animation *Ne Zha 2* and a high performing December box office owing to a varied mix of titles all performing well, including *Avatar: Fire and Ash*, *Five Nights at Freddy's 2*, and *Wicked for Good*.

IMAX Corporation delivered above expectation in its full year 2025 results achieving 16% year-on-year revenue growth. This success is predicated on an increasing pipeline of "filmed for IMAX" titles and growing network of IMAX exhibition systems installed globally, but critically taps into consumers' desire for more experiential spending. The use of advanced audio and visual technologies, like IMAX, can elevate the theatrical experience over home viewing. However, studios also need to be diverse in the development of their feature film slates and prepare a greater variety of small and mid-tier releases in response to generational audience fragmentation to avoid overdependence on flagship titles.

The application of AI & ML in the production process could be a pathway to achieving this, but has proven to be a particularly divisive topic in relation to the development of feature films. Director, James Cameron inserted a disclaimer stating that no generative AI was used in the production of *Avatar: Fire and Ash* into the film's title sequence. Despite pushback from artists and consumers, major studios have continued to experiment with the role AI can play in creating content. In December 2025, Disney committed \$1bn to a partnership with Open AI, however the deal was swiftly brought to an end in March 2026 as Open AI closed down its generative video model, Sora.



The world's greatest filmmakers, Hollywood studios, international studios, even streamers are leaning into blockbuster theatrical releases as drivers of IP and value throughout the chain.

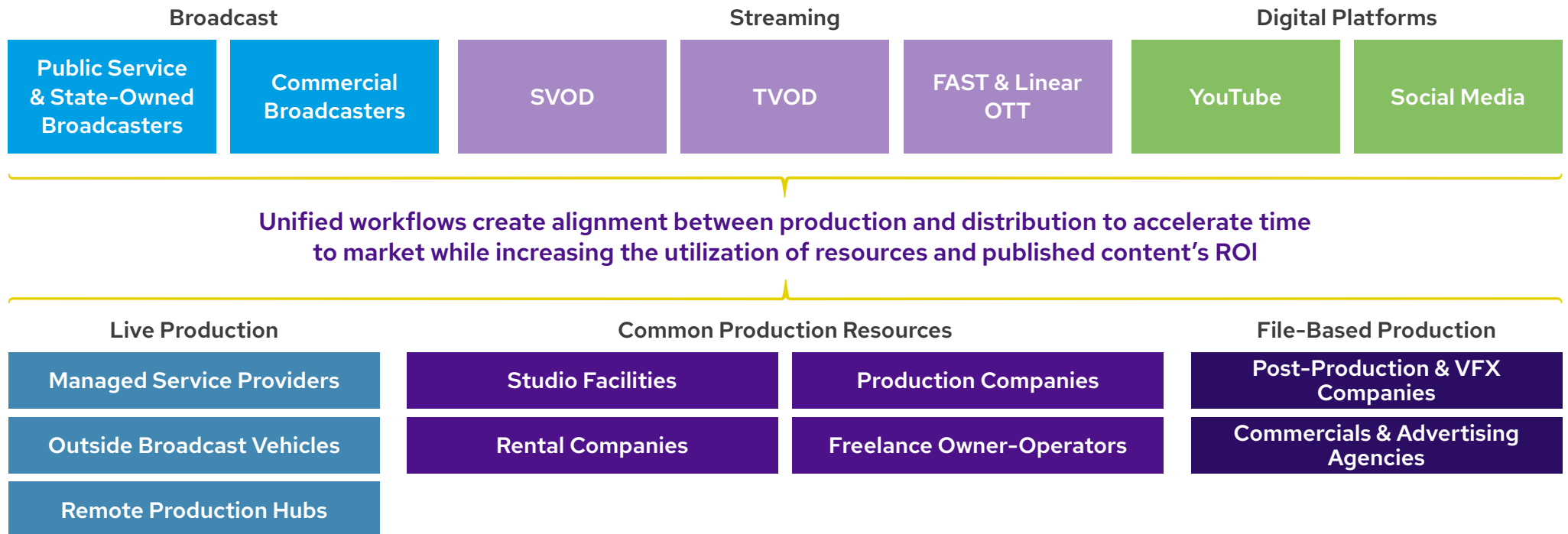


**Rich Gelfond**  
CEO, IMAX

Multi-platform content delivery has led to an increase in the volume of content deliverables and peripheral assets created as media organizations aim to engage audiences across an increasingly fragmented range of services and platforms from traditional broadcast to streaming and digital platforms.

Live production and file-based workflows have their own unique considerations, while distribution platforms will carry different requirements for media delivery. However, media organizations with the scale to create synergies and consolidate their supply chain are investing in the tools and infrastructure to create more unified workflows that can dynamically serve the many different outputs that they now require.

Building unified workflows relies on breaking down siloed operations. Technologies that open up access to resources between facilities and remote collaborators are fundamental to the core infrastructure that enables unified workflows, a reason why IP transport and networking, remote production, cloud computing and cloud storage all continue to rank among the top ten technologies in media buyers' most important roadmap priorities. MediaTech buyers are motivated by the need for greater operational efficiency and deduplication of effort. Vendors should emphasize how their tools can allow them to streamline media supply chains and accelerate time to market.



## Media Technology Buyers

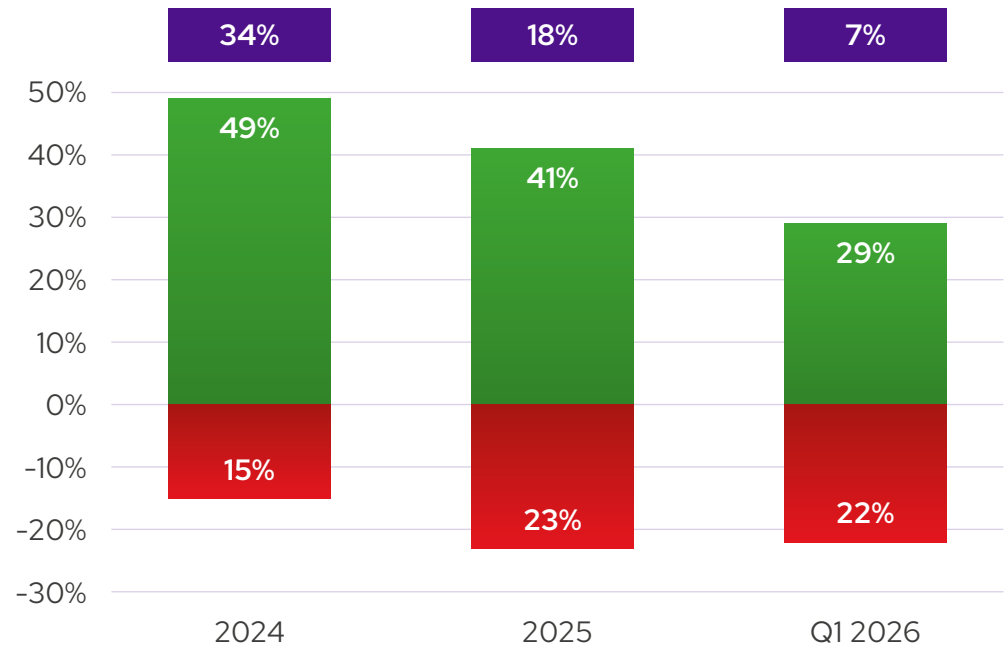
In the media and broadcast vertical sustained pressure on traditional advertising revenue due to the redistribution of advertisers' spend to digital platforms continues to limit many media organizations' budgets. Media buyers from public and state-owned broadcasters also note challenges with allocating budget for technology investment due to rising operational costs across their organization.

Media organizations that have transformed their operations to focus on digital first distribution strategies have been able to defy this overall trend and register revenue growth. For instance, ITV registered a strong performance for its 2025 financial year performing above market expectations with two thirds of the organizations' revenue attributed to ITV Studios and its digital businesses.

The proportion of media technology buyers that expected a decline in budget over the next year decreased by 1% point in Q1 2026 vs 2025, however due to a notable fall in the proportion of respondents (12% points) that expected a budget increase, the NET investment outlook has fallen from an 18% point to 7% point positive result.

Technology suppliers should expect to be met with nearly comparable levels of budget growth and decline, therefore maintaining focus on relationships with growth accounts is crucial due to their shrinking number. Consistency with stable customers is also important as the largest group of MediaTech Buyers (49%) are those that expect their budget to be unchanged, neither increasing or decreasing.

## MediaTech NET Investment Outlook



- Media technology budget will increase
- Media technology budget will decline

Q. What do you predict will happen to your organization's media technology budget over the next year?  
(Media technology buyers, n= from 79 to 128)

**iamt**

connect | support | inform

# Technology Investment

[theiamt.org/biu](http://theiamt.org/biu)

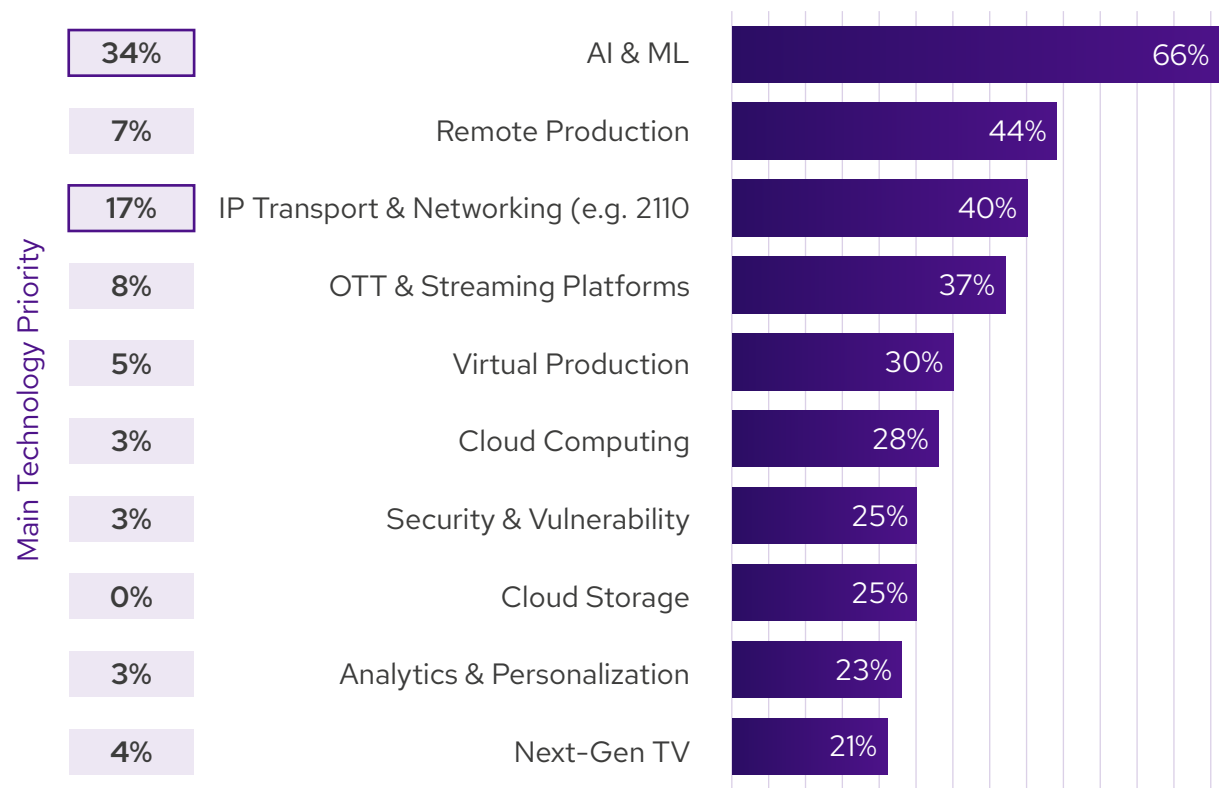


AI has topped the all industry ranking of technology roadmap priorities for four consecutive waves of the MediaTech Industry Tracker survey. The promise of AI’s capability to expedite time consuming and repetitive work, while increasing accuracy by operating at scale and speed that exceeds human skillsets, has been highly attractive to business leaders. However, purchase decision makers across all vertical markets now expect integration ready product that can deliver immediate results.

While AI & ML remains at the top of the ranking, the results of the Q1 2026 survey indicate that the prioritization of the technology may have reached its zenith as the proportion of respondents citing AI & ML in their technology roadmap priorities did not increase but fell by 3% points. Newly emergent MediaTech suppliers that have built their value proposition on AI & ML capabilities need to focus on their commercial longevity by securing consistent repeat business.

2026 marks a crucial evolution in the perception of AI. Business leaders recognize that continuous investment in AI & ML innovation is unsustainable. Close evaluation of AI deployments is now taking place to determine what is commercially viable to apply long term. Vendors can assist media buyers in measuring the performance of their AI & ML tools by designing user interfaces that surface the relevant metrics for users to demonstrate the efficiencies that they have achieved.

## Technology Roadmap Priorities (Top 10)



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

Q. Please choose the most important trend in your organization’s technology roadmap.  
(All industry, Q1 2026, n=158)



## All Industry

MediaTech vendors should expect to receive more discerning consideration of AI & ML products with an expectation from buyers that vendors can effectively communicate the business outcomes delivered by their AI & ML product. Media buyers' primary interests in AI & ML procurement has shifted from pure innovation to prioritizing the ease of integration and measurability of outcomes.

When respondents are asked to cite only one technology to prioritize, IP transport and networking has consistently followed AI & ML as the second most frequently ranked technology in recent years. In Q1 2026 IP transport & networking registered an uplift compared to the combined 2025 results and was noted by 17% of the sample as their main technology priority.

The relationship between remote production and IP transport & networking is important to recognize, as the two areas of investment reinforce one another's importance. Though remote production does not depend on IP transport and networking, the vast majority of remote production workflows being deployed right now leverage contemporary IP protocols such as SMPTE ST 2110, AES67, Dante, NDI, and SRT.

MediaTech suppliers must ensure that their products support interoperability with the relevant IP protocols in their given application and market vertical.

Cloud storage is now taken for granted in all vertical markets. No respondents cited it as the main priority for their technology investment roadmap despite it being the joint seventh most referenced technology priority (25%). Cloud storage is now perceived as commoditized and abundant. Very little margin is available in selling cloud storage unless an organization has the economy of scale of a hyperscaler.

The migration to IP networked architectures, OTT distribution, integration of remote production and cloud workflows are all interlinked. Buyers want trusted suppliers that can deliver multi-year vision and roadmaps for how their organization can invest in these technologies while remaining agile to iterate and innovate as the accelerated rate of technology innovation has introduced a greater perceived risk of technology obsolescence.



We are going directly to IP and the SRT protocol, because it's always cheaper than satellite distribution.



**Martin Rubino**

Programming Vice Chief, TyC Sports Argentina



## All Industry

The relationship between cloud and edge computing is changing as computational demands shift. Cloud computing registered a notable drop of 15% points in the proportion of respondents prioritizing it, yet among the technologies that registered an increase was edge computing. One motivation is optimization, as discrete functions can be delivered more efficiently at the edge, on devices.

The shifting prioritization of compute from cloud to edge evidences the agility that has arisen from virtualizing media applications. Balancing the management of hybrid cloud and on-premises resources requires evaluation not just of spend, but efficiency, availability of resource, and the security and vulnerability of data residency. Evaluation runs through core infrastructure investment and is now increasingly important to secure repeat spend on AI. MediaTech buyers will increasingly expect solutions that are infrastructure agnostic, therefore suppliers must ensure their solutions can be distributed dynamically in hybrid environments.

While AI & ML remains at the top of the list of technology roadmap priorities, a 1% point increase in the number of respondents citing it as a priority

in Q1 2026 compared to 2025 marks a slowdown to the technology's accelerated growth trajectory. The FOMO (fear of missing out) factor that has influenced purchase decision making is giving way to much more considered evaluation of where to apply AI to deliver meaningful outcomes rather than quick wins.

OTT & streaming platforms and analytics & personalization registered respective decreases of 7% points and 4% points to the proportion of respondents that cited them in their technology roadmap priorities. These changes signal that both technology areas are maturing as they move from an area of investment, into an established part of media organizations' operations. The period of service transformation required for established broadcasters to launch OTT services is now beyond its late majority stage, and providers must use analytics to evaluate the performance of their offering and enable the personalization of content. Monitoring and management solutions are therefore a key product category that maturing OTT service providers will be investing in.



Even the most excellent productions and the best infrastructure customers need to be offered a hybrid model in some areas, because it's mandatory, it's not an option.



MediaTech Supplier

 All Industry

Agility & Speed of Delivery

Return on Investment

Vendor Reputation & Relationship

Total Cost of Ownership

Efficiency

Flexibility & Customization

Innovation & Future Roadmap

The consideration of most **emerging importance** to media technology buyers in Q1 2026 is agility and speed of delivery. As organizations across different market verticals build new media supply chains time to market is of crucial importance to gain a competitive advantage against peers doing the same. The growing awareness of the benefits of software defined tools has increased the appetite for agile products and services. Agility can be marketed as a value-add feature.

The purchasing factors that have **become most important** in 2026 are return on investment, vendor reputation & relationship, and total cost of ownership. MediaTech buyers in all verticals are conducting considered evaluation of the products and services that they use, with an end-to-end mindset of how costs and benefits are balanced throughout their supply chain. In this environment vendors' reputation will be defined by how transparent they are with customers looking for a predictable total cost of ownership and how effective they are in delivering their value proposition. Vendors should pay close attention to buyer and prospect feedback to ensure that their sales teams' communications reflect the styles that are trusted by respective customer groups. As the addressable market for MediaTech expands, suppliers that have traded on a prestigious reputation in the media & broadcast vertical must recognize that they have to invest in cultivating their presence when entering new markets as buyers will not be familiar with their brand heritage and equity.

The decision-making factors that remain important in 2026 are efficiency, innovation & future roadmap and flexibility & customization. In 2025 selling efficiency became the most effective way to drive MediaTech sales. Being able to quantify and demonstrate efficiency metrics, such as the reduction in volume of media storage used, or rack space saved in outside broadcast vehicle became the leading metrics to gain customers' attention rather than technical specification such as the volume of signal channels, or maximum resolution supported. Product managers and marketing teams need to apply this mindset in 2026, noting that the metrics of efficiency they promote may vary based on market vertical.

Trust and confidence in technology suppliers' ability to innovate is determined by their vision of their future roadmap. Asserting roadmaps effectively helps alleviate media buyers' fear of technology obsolescence. MediaTech buyers still want to gain the most value from multi-year investments through sustained utilization. Product planning and engineering should incorporate modularity that enables customization, and upgrade pathways that provide flexibility, to help ensure repeat spend over time. This can also help navigate budget limitations by segmenting spend over phased deployments.



## All Industry

Evaluating the total cost of ownership for a media workflow is now imperative to MediaTech buyers. The importance of total cost of ownership as a technology purchasing factor has increased by 6% points compared to the previous wave of the MediaTech Industry Tracker, becoming the top priority in media technology buying decisions (60%) and surpassing innovation and future roadmap considerations (53%) the leader in the previous wave. Media technology buyers who prioritize total cost of ownership also tend to focus on revenue generation, thinking in lifecycle terms and often benchmarking TCO against revenue metrics to ensure that technology spending does not hinder growth.

Agility & speed of delivery (43%) has emerged as the fastest-growing media technology purchasing factor in Q1 2026 rising by 13% points compared to the previous wave. As with vendor reputation & relationship, agility is positively associated with training & support.

As media technology investment continued to decline alongside weakening of business confidence in Q1 2026, buyers increasingly prioritized ROI. A stronger focus on ROI is associated with lower emphasis on innovation and future roadmap considerations, suggesting a trade-off, while positively correlating with vendor scale and financial viability. MediaTech organizations should not lose sight of long-term strategic goals when prioritizing ROI.

Vendor reputation and relationship as a purchasing factor has grown by 11% points, becoming the second-highest priority when purchasing media technology. IAMT's data shows that this purchasing factor correlates with training & support and flexibility & customization. Media technology buyers build strong relationships and trust with vendors who provide robust training and proactive support, delivering greater long-term value and reducing perceived adoption risk. Vendors that offer flexible deployment models, modular architectures, and scalable licensing are perceived as better long-term partners that adapt to customer needs.

MediaTech suppliers should lead on this strength and tailor messaging accordingly to end-users in different market verticals.

Sustainability has become a supporting factor for purchase decision making rather than a standalone factor, as measurable returns from all initiatives – including sustainability – are driving MediaTech buyers' decisions.



[Broadcasters] are bringing things back, especially workloads which are known and fixed. If you've got a known fixed workload, then it can be more cost effective to run it in a hybrid manner rather than fully on the cloud.



**Mark Johns**  
CEO, Switch Media

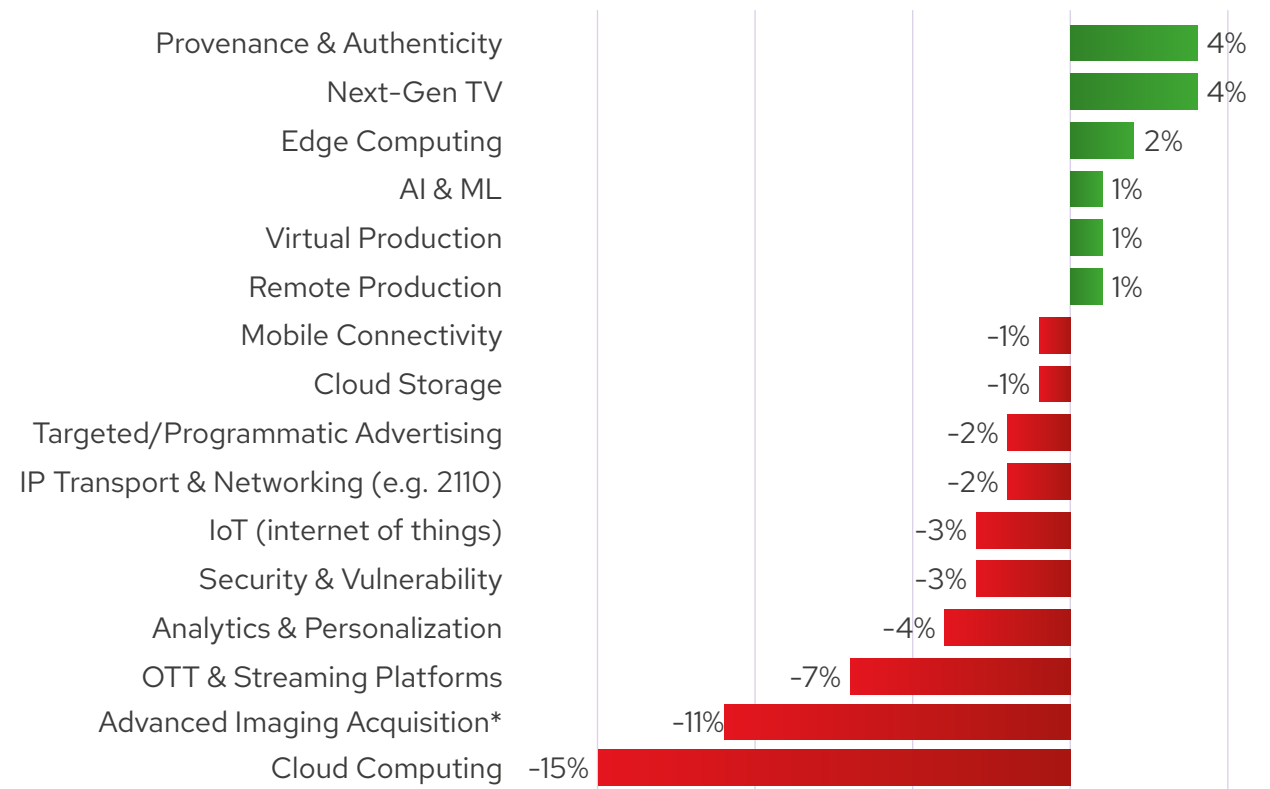


Reflecting the importance to all industry stakeholders of trust, technology that can deliver provenance and authenticity has seen the greatest uplift in the most recent survey wave, along with Next-Gen TV. The ecosystem of products that feature provenance and authenticity is quickly growing due to supplier and buyer support for C2PA Content Credentials. As an open technical standard for publishers, creators and consumers, C2PA provides an accessible method for the origination and manipulation of content to be tracked and attributed throughout its lifecycle. Media organisations that are implementing generative AI in their creative pipelines represent a commercial opportunity for products and solutions that can deliver streamlined systems for managing provenance & authenticity efficiently throughout workflows and distribution.

Provenance & authenticity is a fundamental pillar of media organizations’ relationship with their audiences as the foundation for gaining and renewing their trust. For public service broadcasters and news services their reputation and existence can depend on how audiences rate the legitimacy of their output. MediaTech buyers in this end-user group represent a key group of early adopters.

Next-Gen TV is gaining importance as introducing extra engagement and interactivity to TV broadcast is vital to remain relevant to advertisers. Next-Gen TV standards are vital to add value to TV advertising in response to the success of digital advertising.

## Technology Roadmap Priorities, Change over Time



\*Note: “Advanced Imaging Acquisition” was “Imaging (e.g. HDR, 8K, HFR)” in 2025  
 Q. What are the most important trends in your organization’s technology roadmap?  
 (All industry, the difference between Q1 2026 and 2025, n=158/300)

# AI Supply Chain Impact

Applications of AI that are specialized for media content supply chains have improved significantly over the past few years. These can vary throughout the supply chain from the point of acquisition through to consumption. These use cases for AI are also accelerants in the democratization of MediaTech and enable a more diverse range of end-users in different verticals to engage with MediaTech through skills augmentation and automation.

The universe of MediaTech suppliers is expanding as the supply chain for AI capabilities leverages products and services from organizations serving a wider IT and enterprise customer base. This is an extension of an ongoing transformation in the composition of MediaTech buyers' pool of suppliers that was initiated by the migration to IP, adoption of COTS servers, and integrating public cloud storage and compute. However, AI adds an additional layer of consideration to the technology stack that is not necessarily tied to the compute and processing resource.

Depending on the needs of the end-customer, MediaTech vendors should ensure that the composition of their solution aligns with the level of control the buyer needs over their technology stack. Do they have freedom of choice to customize their AI supply chain, or are they looking for simplicity with a fully integrated solution. Where MediaTech suppliers cannot develop their own proprietary AI capabilities they may still be expected by customers to provide an interface for a third party model. Established suppliers need to carefully evaluate the security implications for their key customers when integrating with new foundational models to ensure they retain a trusted reputation.

## AI applications in media supply chains

Synthetic video generation

Metadata tagging

Captioning

Content optimization

Signal monitoring

Summarization

Audience analytics & personalization

Translation

Versioning

## Workflow integration/ user-interface



Adobe® Creative Cloud™



## Compute/ processing



Google Cloud



## Foundation model



Please note a representative selection of service providers are featured to demonstrate the layers of the supply chain, this visualization should not be viewed as exhaustive.

As AI models are becoming increasingly sophisticated, the volume of queries and reasoning-heavy AI workloads are rising rapidly, shifting the focus of AI investment from training to inference (the use of trained AI models to draw conclusions). The ratio of AI compute between the two workload types, training (~80%) and inference (~20%), is now shifting towards inference, re-shaping hyperscalers' strategies and catalysing a move from centralized to distributed cloud computing.

To scale the capabilities of AI solutions, trained AI models need to be run through new information in real-time, which means that data centers will have to adapt to support inferencing at scale and be capable of low-latency processing in real time. This can be achieved at the edge, because edge computing allows processing data near its source, reducing bandwidth demands. These smaller edge computing data centers and distributed cloud architectures will need power-efficient hardware like ARM-based computing and custom silicon.

The graphics processing units (GPUs) that deliver the computation in AI chips need high-bandwidth memory (HBM) chips to run AI inference. Major AI chip makers like Nvidia and OpenAI have recently entered significant contracts with the three leading memory chip manufacturers (Samsung, SK Hynix and Micron) which has led to a severe shortage of memory chips globally, doubling their price. As a result, major consumer electronics manufacturers like Apple and Dell Technologies announced that they expect their cost bases for all products, including graphics cards and game consoles, to increase due to the memory shortage. In January 2026 alone, Dell increased the prices of its higher-end notebooks by 25%, reflecting the supply chain disruption.

The rising prices of memory chips are expected to increase costs for a broad range of MediaTech products. Integrated AV systems such as B2B displays (e.g. LCD and dvLED displays) used in digital signage, media processors, embedded boards and other AV solutions using memory have already been reported to be affected. The increased costs of memory chips will also impact the availability and accessibility of MediaTech products and services. End-users will have to adjust budget expectations where suppliers cannot absorb increases to their cost base.

The shift towards more distributed cloud compute and cloud capabilities across multiple physical locations is accelerating due to the growing importance of digital sovereignty, sovereign AI, and edge deployments at scale. Distributed cloud, which may consist of customer-owned data centers, regional facilities and edge environments, allows media businesses to retain physical control over infrastructure, but still benefit from agile access to advanced AI and cloud services. The changing geopolitical landscape and cost of resources will motivate end-users to reevaluate their spend on cloud services and may trigger reallocation of resources based on new priorities.



In two years, the PC can definitely run AI inference, maybe OpenClaw or something. [...] No need to be afraid [of memory oversupply] because edge device AI is coming.



**Khein Seng Pua**  
CEO, Phison

In Q1 2026, the emergence of AI agents, which until recently have failed to reach mainstream recognition compared to large language models like OpenAI's ChatGPT, accelerated significantly. This was driven by the launch of an open-source AI agent, OpenClaw, in November 2025 by an Austrian software developer Peter Steinberger. OpenClaw is capable of automating tasks like managing calendars and emails, browsing the internet and interacting with online services and runs directly on individual users' operating systems and applications.

To use its AI features, OpenClaw has to be installed on a local device or a server and then be connected to a large language model like ChatGPT or Claude. Rather than being a new AI model, OpenClaw acts as a software layer, enabling developers to create AI agents that can interact with multiple services, analyze data and coordinate different AI agents.

The emergence of "always-on" AI agents running locally on devices is forcing technology firms to rethink the AI hardware stack, because it shifts the actual point of deployment away from cloud-based interaction to autonomous edge AI, running locally on consumers' devices. WhatsApp, Alibaba, Tencent and ByteDance (TikTok) have already adopted OpenClaw to upgrade their own chatbots with new AI features, shifting the locus of deployment to smartphones and PCs.

For MediaTech suppliers the introduction of autonomous AI agents introduces new opportunities for workflow automation between different products and services. Product managers will need to review if new API integrations and partnerships will be beneficial to their customers. MediaTech buyers will note the potential for new security vulnerabilities to be exposed by granting access to autonomous agents, particularly when running on personal devices. Suppliers will therefore need to redefine conditional access and zero trust parameters to incorporate AI agents into their products and solutions.

As media supply chains that are deployed in parallel market verticals to media and broadcast rely more heavily on external skills either from integrators or managed service providers, the support of autonomous AI agents could provide additional skills augmentation to a broader group of organizations democratizing MediaTech further.



If you look at OpenClaw and the adoption of it, Linux took some 30 years to reach this level. OpenClaw is now the single most downloaded open-source software in history, and it took 3 weeks.



**Jensen Huang**  
CEO, NVIDIA

The rapid proliferation of generative AI tools has led to a surge in the creation of synthetic media, making it increasingly difficult to distinguish authentic from manipulated material and posing a significant threat to audience trust, particularly in the news sector. Younger audiences are shifting away from traditional search engines and increasingly relying on social media platforms as their primary surface for content discovery. News consumption on these platforms continues to rise, with 43% of young adults aged 18-29 in the US consuming news on TikTok, according to the Pew Research Center. These changes in content consumption patterns and the rise of GenAI have led to the emergence of provenance and authenticity as an important technology roadmap trend.

In the previous edition of State of MediaTech (IBC 2025), IAMT highlighted the growth in the importance of this tech trend as the proportion of respondents citing the technology as important to their roadmap rose from 5% to 10% in roughly six months between the two waves of the tracking survey. In Q1 2026, this trend plateaued, with 11% of the industry citing this technology among the main priorities in their organizational technology roadmaps.

The primary deployment areas for provenance and authenticity technologies are in content management, as well as creation and production to embed provenance at the point of origin. Investment in provenance and content authentication tools will continue to grow in the mid-term over the next two to three years due to the role the technology will play in security ecosystems.

All organization will need to invest in internal systems to validate content signatures. The focus is shifting from device-level to identity-level verification (from technical to editorial provenance) to ensure that content originates from trusted partners. Development of provenance tools requires a holistic, ecosystem-wide approach and collaboration between CDN providers, security organizations, cloud service providers, and industry bodies.

Adoption of C2PA content credentials has already moved beyond media & broadcast due to the prevalence of media content in communications and digital ecosystems. Use cases can range from forensic and evidential applications in judiciary government applications to corporate communications where the authenticity of content featuring company representatives needs to be verified.



The efficiency of using AI to do some things would be risky compared to our most important value which is actually credibility.



**Peter Zanchetta**

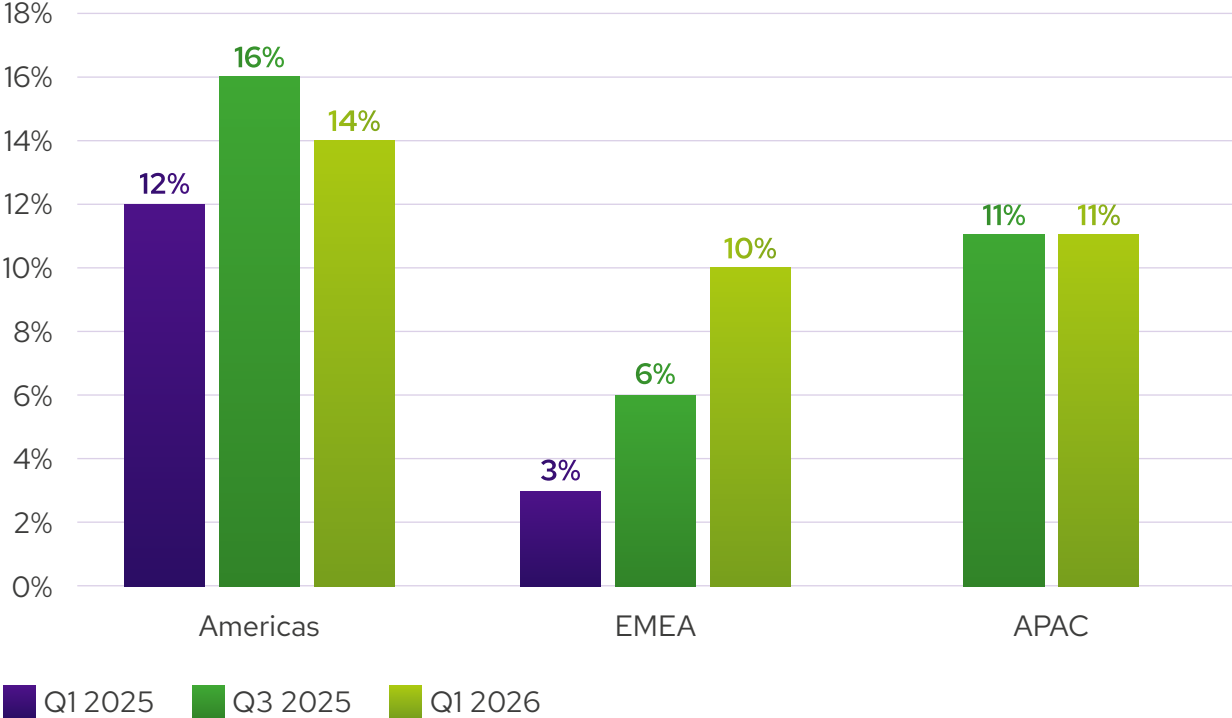
Head of Technology, TV2 Nord Denmark

## All Industry

Provenance and authenticity initially gained importance in the Americas. The results of the Q1 2026 MediaTech Industry Tracker evidence a rise in global importance as the proportion of respondents citing the technology as an important trend in their roadmap have caught up among companies headquartered in EMEA and APAC. MediaTech suppliers should prepare for increased engagement from buyers in all three regions as rising geopolitical tensions and war elevate the importance of provenance and authenticity in news reporting as well as government and military communications.

The recent boost in prioritization by companies headquartered in Europe is mainly driven by new regulations, most notably the EU AI Act. The Act mandates AI systems to ensure machine readable and detectable marking of AI-generated or altered synthetic content (Article 50). This means platforms and model providers must adopt provenance layers, accelerating the adoption of standards such as C2PA. Most provisions of the Act will become applicable on August 2, 2026, with penalties for non-compliance reaching up to €35 million or 7% of total worldwide annual turnover. Suppliers selling AI solutions in the region must therefore act quickly to ensure business continuity without financial penalties.

### Provenance & Authenticity Across Regions



Q. What are the most important trends in your organization’s technology roadmap? (All industry, n= from 19 to 80)

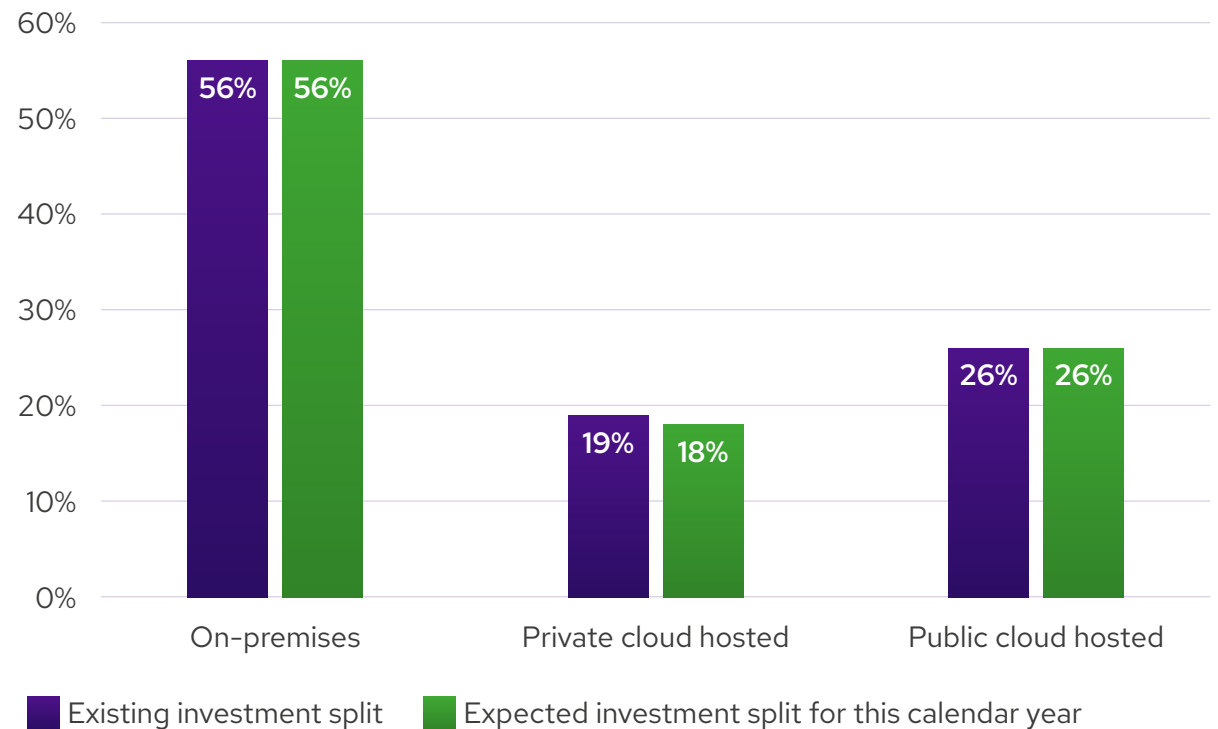
**Media Technology Buyers**

Although cloud computing and cloud storage consistently feature in the top 10 technology roadmap priorities year-on-year, on average the majority of media companies' core infrastructure investment remains on-premises. When asked about their expectations for investment during the 2026 calendar year, media technology buyers demonstrated that their allocation of investment will remain relatively consistent.

While core infrastructure migration is in motion that will lead to cloud services playing a bigger role in media organizations' core infrastructure, the outlook for overall investment in cloud compute and storage indicates a slowdown in the rate of growth. When asked about their overall investment in cloud compute, 69% of media/production companies interviewed noted that they expected an increase over the next year, however this result from Q1 2026 was a lesser majority than in 2025 (78%). Overall investment in cloud storage also remained positive with 63% of media/production companies expecting an increase in spend over the next year, however this marked a larger drop than cloud computing falling by 16% points from 79% in 2025.

These shifts illustrate an optimization of the hybrid cloud model. As media organizations gain more experience with cloud utilization, investment can be more precise. The decreased levels of expected investment in Q1 2026 for overall spend on cloud compute and cloud storage could also be influenced by aversion of perceived risk that has been triggered by major outages in 2025.

## Media Companies' Infrastructure Investment Allocation Split



Q. In approximate percentage terms, how would you describe the allocation of your media organization's existing core infrastructure investment? Q. 'In approximate percentage terms how do you expect your annual spend for this calendar year to split between the following infrastructure? (Media technology buyers, Q1 2026, n=48/46)

As more MediaTech suppliers come to rely on public cloud providers in their own supply chain to deliver products and services to media organizations, the evaluation of the performance of cloud resources becomes a more universal need for stakeholders throughout the value chain.

During 2025 several high-profile cloud service outages occurred including a 15 hour shutdown of AWS US-East-1 in October 2025. In November and December issues with Cloudflare's CDNs affected AI platforms including ChatGPT and Claude. Data warehousing platform Snowflake experienced a 15 hour outage in December.

Global IT infrastructure now relies on public cloud services. The impact of these outages affected customers in a broad range of verticals including critical infrastructure such as financial institutions, healthcare, and enterprise communications. Particularly in live broadcast workflows redundancy has always been an essential consideration in system architecture, however applications such as government, healthcare, and military also share high expectations for resilience that need to be factored into their use of MediaTech.

The action taken by cloud service providers in response to an outage is to publish a root cause analysis following from the event. Taking a stance of accountability and transparency is a crucial action to follow from these events to preserve trust with customers in all market verticals.

The pragmatic approach for the MediaTech industry to continue to advance is not to isolate itself from these issues but to develop the precautions and processes that can minimize the impact on end-users and their operations in the event of a cloud service outage.

The presence of war in Europe and the Middle East has escalated national security concerns globally. In these environments broadcast news infrastructure plays a vital role in documenting events and communicating information, including public service announcements. National security concerns have been a motivating factor for some governments such as the United States to invest in digital sovereignty initiatives (such as the CHIPS act) to guarantee access to advanced hardware, as well as promoting data sovereignty to account for the secure residency of their data. These concerns, coupled with advancing AI capability are altering the character of the global footprint of cloud service capability and availability.

As the continuity of MediaTech suppliers' products and services become more intertwined with public cloud infrastructure, product managers should continue to monitor their customers' preferred suppliers on a regional basis to ensure that they can provide a trusted option for the delivery of their services.



Our cloud strategy changed about two years ago. It was not a deal due to the GDPR. It was a deal to survive if something happened in Europe.



MediaTech Buyer

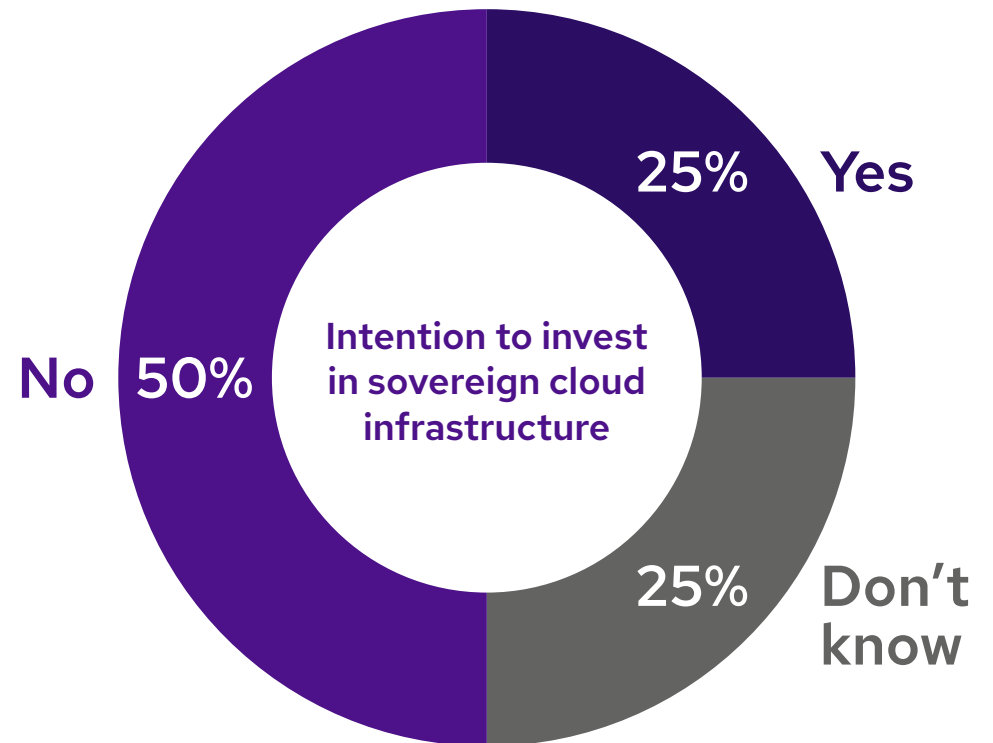
## Media Technology Buyers

The prevailing concern with the residency of data, in parallel with the increasing adoption of decentralized IT infrastructure, has created a need for sovereign cloud services. In response to this requirement from across multiple vertical markets hyperscalers are investing strategically in creating datacenters and cloud services that are sovereign by design.

AWS launched the European Sovereign Cloud as an independent cloud service for Europe designed to enable public sector organizations and end-users in strictly regulated use cases to achieve their compliance needs. This €7.8bn infrastructure investment launched its first region at the end of 2025 in the German State of Brandenburg.

To monitor MediaTech buyers' engagement with sovereign cloud infrastructure the Q1 2026 wave of the IAMT MediaTech Industry Tracker introduces a new question to understand buyer's interest in sovereign cloud infrastructure.

At this stage providing sovereign cloud infrastructure is not an essential requirement for suppliers to support as half of MediaTech buyers interviewed did not plan to invest in sovereign cloud infrastructure during the 2026 calendar year. However, with 25% stating intent to invest, and a further 25% still unsure, MediaTech suppliers should be prepared to engage with sovereign cloud requests during the procurement process for infrastructure projects.



Q. Does your organization plan to invest in sovereign cloud infrastructure during this calendar year? (Media technology buyers, Q1 2026, n=44)



## The growing prevalence of remote production and decentralized workflows has necessitated transformation to media organizations' infrastructure.



The reaffirmation of on-premises hardware is often misrepresented as a rejection of cloud resources. The most critical technology and value is now held in the ability to operate with both, and use hardware to guarantee performance and predictability where it is needed and leverage cloud for elasticity and access where this will enable agility.

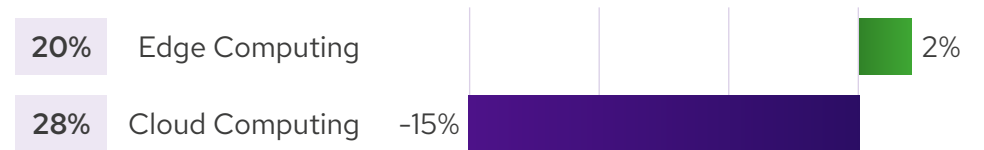
Identifying these opportunities, relies on innovation and testing. Every media organization needs to trial a cloud workflow before they can identify where the economics work for them. The challenge for suppliers is that there is not a one size fits all solution, particularly when working with new customers in verticals beyond media & broadcast. Analytics and tools that can surface the key information that decision makers need to evaluate the performance of their cloud resources and calculate total cost of ownership are what make the difference between a supplier's solution being the preferred choice and an inconvenience.

For the most advanced media organizations, evaluation has become part of their operating process. Utilization data gathered on past projects lead the decisions made on the next production. Hybrid cloud has become the standard operating model for most. MediaTech buyers do not consider cloud vs on-premises infrastructure as a binary, and suppliers should ensure they can show flexible options to customers.

The next generation of agentic AI adoption, and optimization for inference will lead to a redistribution of resource towards edge computing. Comparing Q1 2026 results of the IAMT MediaTech Industry Tracker with 2025 indicates this trend. When more specialized tasks can be performed on edge devices, MediaTech vendors can add value to products by reducing end-users' overall cost of operation by redistributing cloud resourcing in their workflow to more efficient edge devices. This is a notable opportunity for product development.

### Change of Investment in Cloud and Edge Computing

Roadmap  
Prioritization  
Q1 2026



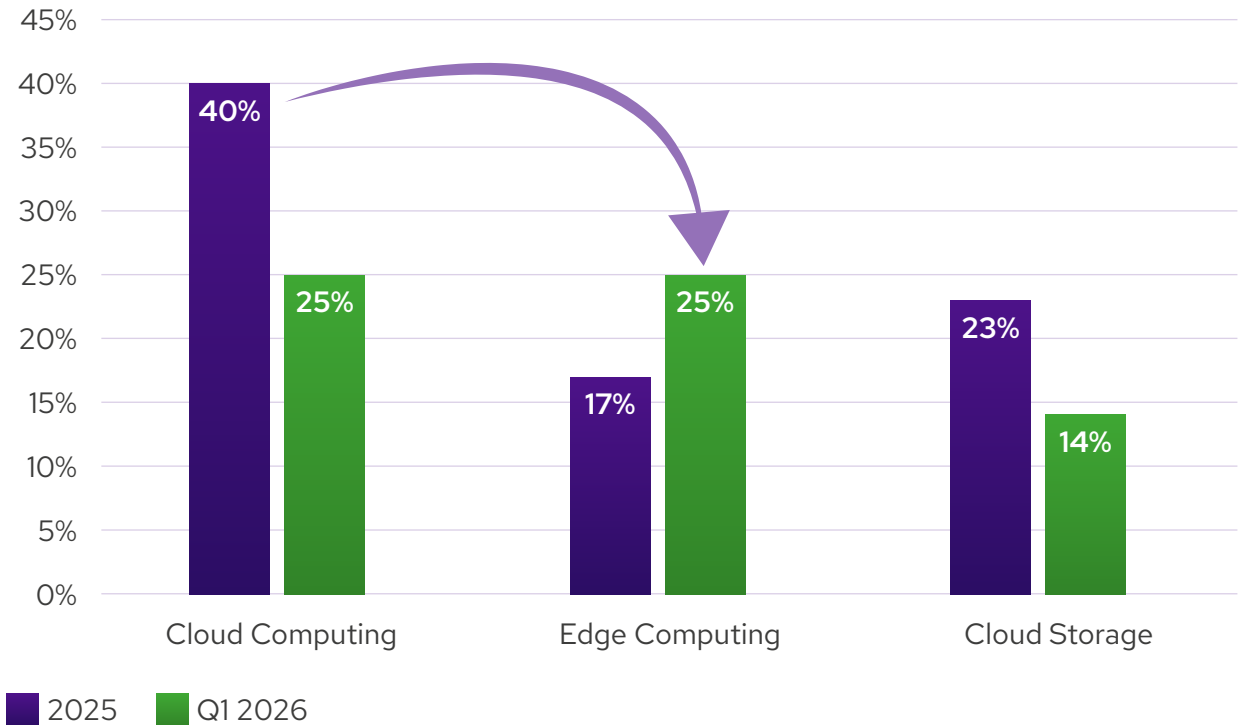
Q. What are the most important trends in your organization's technology roadmap? (All industry, Q1 2026 vs. FY 2025, n=158)



Western European companies are reallocating investment toward edge computing. The importance of cloud computing in the technology roadmaps of MediaTech vendors and end users declined in Western Europe and North America in 2026. In Western Europe, this is part of a broader technological trend of organizations reallocating investment toward edge computing, driven by EU priorities around digital sovereignty, latency reduction, and energy efficiency, as reflected in initiatives such as the Digital Decade strategy developed by the European Commission. The impact of this shift will apply across customers in all market verticals in the region, and is not exclusive to MediaTech buyers in the media & broadcast vertical.

This strategy promotes a shift from centralized data centers to edge computing to enhance processing speed, data privacy, and energy efficiency. By 2030, the EU aims to deploy 10,000 climate-neutral edge nodes and ensure that 75% of European businesses adopt cloud-edge technologies. As MediaTech vendors design more agile and flexible software defined tools the consideration for how they are optimized across cloud and edge compute dynamically should be taken into account, and future product releases must be reviewed to ensure that they are compliant.

## Technology Roadmaps in Western Europe



Q. What are the most important trends in your organization's technology roadmap? (Western Europe, n= 124/56)

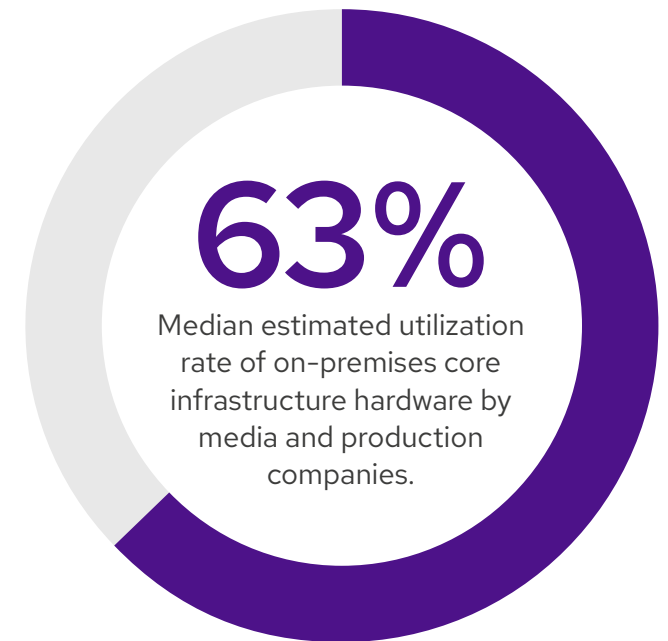


## Media Technology Buyers

When asked the average utilization rate of their on-premises core infrastructure hardware, the median result from media technology buyers demonstrated a relatively strong result of 63%.

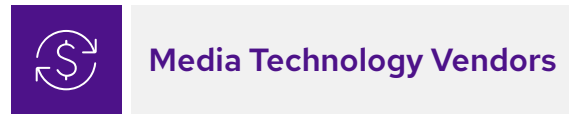
The argument against investing in on-premises hardware has been the ongoing cost of housing and maintaining equipment that may remain idle. The strategic focus on optimization and efficiency in recent years is likely to be a contributing factor to this relatively strong overall result. Achieving a high utilization rate for core infrastructure hardware can be a result of buying less and buying with more purpose and intention. Investing in cloud resources can also be a contributing factor to media organizations running a more lean on-premises operation by consolidating their footprint of hardware to the essentials, and using the flexibility of cloud to scale up on demand.

The critical skill now for technical leaders in media organizations such as CTOs is planning the distribution of their infrastructure between on-premises hardware and cloud resource. As a result, products and services that can provide data to derive an end-to-end evaluation offer a competitive advantage. The majority of media organizations still want to build a best of breed solution (66%), so interoperability and partnerships remain crucial in the media & broadcast vertical. However, in parallel market verticals where buyers typically have less in-house knowledge to integrate products, single-vendor solutions can be more attractive, provided that buyers do not feel “locked-in” by the technology ecosystem presented.



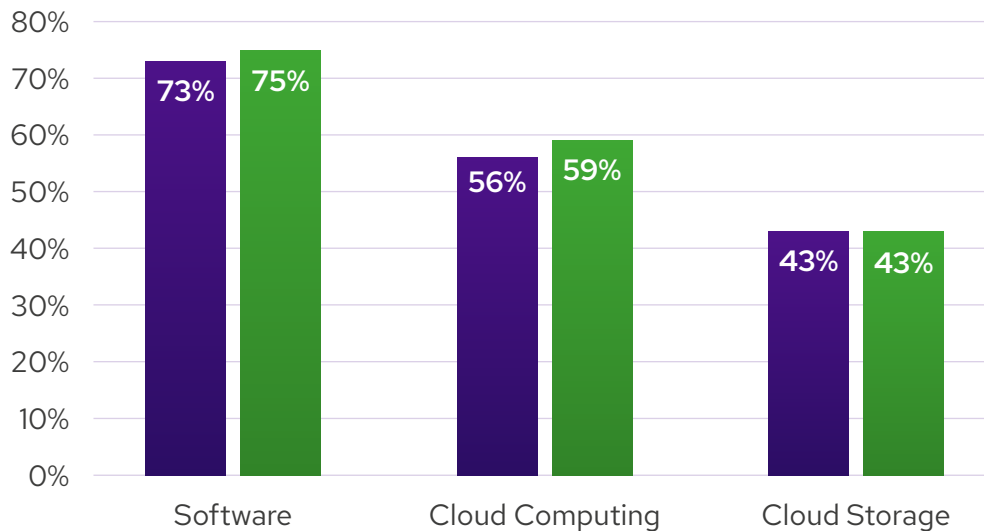
Q. What is the average utilization rate of your on-premises core infrastructure hardware equipment? (Media technology buyers, Q1 2026, n=46)

## End users' investment outlook in software has accelerated in Q3 2025



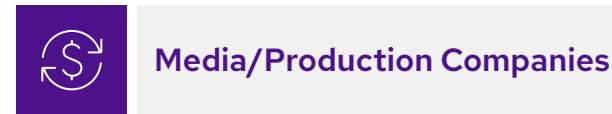
### Supplier Revenue Outlook

NET outlook (Total increase minus decline)



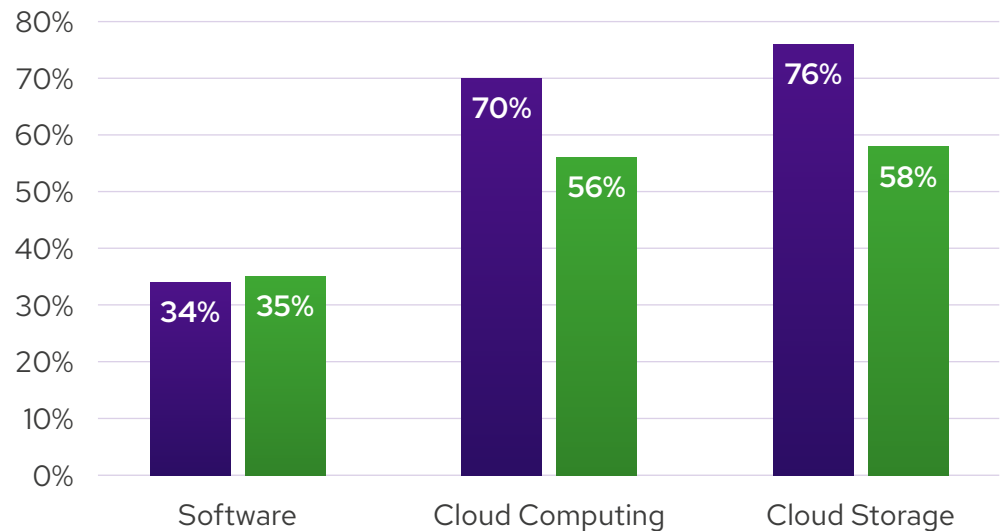
■ 2025 ■ Q1 2026

Q. What is your outlook for your organization's different types of technology revenues over the next year? (media technology vendors, sample size - from 28 to 142)



### End-User Investment Outlook

NET outlook (Total increase minus decline)



■ 2025 ■ Q1 2026

Q. What is your outlook for your organization's investment in the following categories of products/services over the next year? (media/production companies, sample size - from 16 to 64)

The NET investment outlook for Media production companies' change in spend on both cloud compute and cloud storage has decreased in Q1 2026 compared to 2025. Software on the other hand registered a minor rise by 1% point as 36% more of this group expected an increase in spend than those that expected a decrease.

Industry collaboration to develop the Media eXchange Layer initiative as originally set out in the Dynamic Media Facility reference architecture published by the European Broadcasting Union (EBU) has created renewed momentum for software defined applications and promoted multivendor interoperability. Building on the use of the MXL software development kit, test cases of MXL were implemented by CBC in the broadcaster's coverage of the 2026 Winter Olympics.

The purpose of deploying dynamic media facility architectures is to enable broadcasters and media organizations to apply a more modular and agile concept to how they plan, deploy and operate media functions in a workflow. The test case at the Milano Cortina Olympics will provide a trial for broadcasters to evaluate if modular software defined processes were able to achieve benefits in production efficiency over hardware driven alternatives.

MediaTech suppliers that develop solutions that work on the principles of shared memory compute, as used in the Dynamic Media Facility reference architecture will be able to transfer products and services more easily to parallel markets. As all vertical markets can take advantage of generalized compute resources on premise and in the cloud, software defined MediaTech solutions can leverage existing investment and skillsets that these customers already possess.



The global idea is to evolve towards a modular service-led architecture and to switch from a monolithic world to a very modular and agile way to produce services for our customers. [...] Customers say I want to pay just what I use and what I need to use.



**Sylvain Merle**  
CTO, BCE

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## Featured Quotes

**Marc Bruce**, CEO, Encompass – MediaTech vendor in IAMT analyst led interview  
“We definitely see need for speed and faster time to market.”

**Steph Lone**, Global Leader – Solutions Architecture, AWS  
“Teams that treat restraint, ethics, and audience trust as creative inputs will stand out as premium and principled.”

**Anonymous** – Respondent to IAMT MediaTech Industry Tracker  
“Adjacent and peripheral markets offer opportunities to apply existing knowledge and experience into new verticals.”

**André Torsvik** – EVP Operations, Mimir (FonnGroup)  
“We have a subsea company in the North Sea, we have an international hotel chain [as customers] – which was surprising to us – but the world is full of video now”

**Anonymous** – MediaTech supplier in IAMT analyst led interview  
“There are plenty of opportunities if you're willing to be agile and you do need to be agile [...] you need to have the expertise and the relationships with the customer so they are confident that when you say you can deliver something they have the confidence that you can deliver it and it will work.”

**Anonymous** – Respondent to IAMT MediaTech Industry Tracker  
“The industry is shifting toward a fragmentation of supply and demand, which entails a reduction in margins and an increase in operational risk.”

**Takumi Yamaguchi**, Japan Professional Football League – Media Partner in IAMT analyst led interview  
“Now that we have YouTube, the competition is not among the broadcasters themselves, but between individual persons and social media. The amount of content is huge.”

**Neal Mohan**, CEO, YouTube  
“Building on our success in the living room, we're driven by the simple belief that TV should be easy. We'll soon launch fully customizable multiview and more than 10 specialized YouTube TV plans spanning sports, entertainment and news – all designed to give subscribers more control.”

## Featured Quotes

**Regina Rossi**, Head of Product, AWS Media Services

“Putting live vertical streams and clips on social platforms helps with content discovery and captures viral moments in real time – reaching audiences where they’re already engaged. Having more vertical content in their existing apps also provides viewers with an experience that feels more mobile-friendly.”

**Spence Neumann**, CFO, Netflix

“We said all along this opportunity was a nice-to-have at the right price, not a must-have at any price.”

**Rich Gelfond**, CEO, IMAX

“The world’s greatest filmmakers, Hollywood studios, international studios, even streamers are leaning into blockbuster theatrical releases as drivers of IP and value throughout the chain”

**Martin Rubino**, Programming Vice Chief, TyC Sports Argentina – Media Partner in IAMT analyst led interview

“We are going directly to IP and the SRT protocol, because it’s always cheaper than satellite distribution.”

**Mark Johns**, CEO, Switch Media – MediaTech supplier in IAMT analyst led interview

“[Broadcasters] are bringing things back, especially workloads which are known and fixed. If you’ve got a known fixed workload, then it can be more cost effective to run it in a hybrid manner rather than fully on the cloud.”

**Anonymous** – MediaTech supplier in IAMT analyst led interview

“Even the most excellent productions and the best infrastructure customers need to be offered a hybrid model in some areas, because it’s mandatory, it’s not an option.”

**Khein Seng Pua**, CEO, Phison

“In two years, the PC can definitely run AI inference, maybe OpenClaw or something. [...] No need to be afraid [of memory oversupply] because edge device AI is coming.”

**Jensen Huang**, CEO, Nvidia

“OpenClaw is probably the single most important release of software ever. If you look at OpenClaw and the adoption of it, Linux took some 30 years to reach this level. OpenClaw is now the single most downloaded open-source software in history, and it took 3 weeks.”

**Peter Zanchetta**, Head of Technology, TV2 Nord – Media Partner in IAMT analyst led interview

“The efficiency of using AI to do some things would be risky compared to our most important value which is actually credibility.”

**Anonymous** – Media Partner in IAMT analyst led interview

“Our cloud strategy changed about two years ago. It was not a deal due to the GDPR. It was a deal to survive if something happened in Europe.”

**Sylvain Merle**, CTO, BCE – MediaTech vendor in IAMT analyst led interview

“The global idea is to evolve towards a modular service-led architecture and to switch from a monolithic world to a very modular and agile way to produce services for our customers. [...] Customers say I want to pay just what I use and what I need to use.”

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