

IABM: State of MediaTech

IABM Business Intelligence Unit

18 April 2026

Introduction

About this report

18 April 2026

IABM Research Streams

The structure of the Business Intelligence Service



State of MediaTech

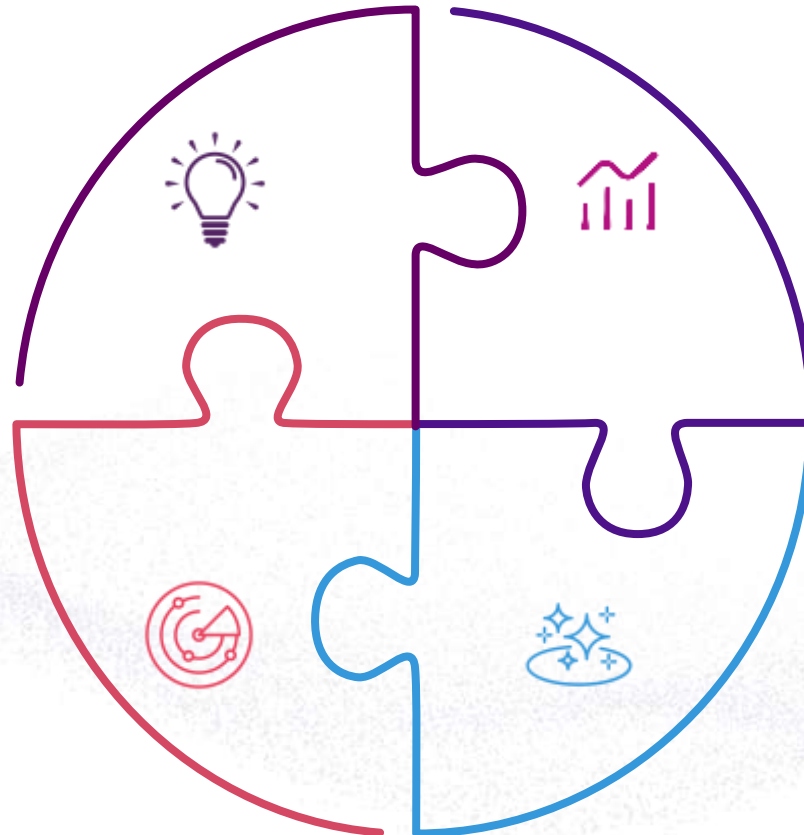
Strategic analysis of MediaTech sector

NAB 2024	IBC 2024
NAB 2025	IBC 2025

MediaTech Radar

Blogs and newsletters focusing on spotlight topics in MediaTech

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



Trackers

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

GeoTracker	TechTracker
ChainTracker	

Megatrends

Analysis of major trends that are fundamentally changing MediaTech

Democratization	Business Transformation
Security	Game Industry Convergence

Note: the dimmed reports are yet to be published

Recently Published Reports

Access IABM research on MediaTech Vantage™



Spotlight topics



State of MediaTech – September 2025

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



Security in MediaTech Ecosystems – August 2025

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



Business Transformation – March 2025

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

Other reports

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

State of MediaTech Report Methodology

This report was prepared using a hybrid research approach



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

Primary Research

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

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

Secondary Research

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

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

About this Report

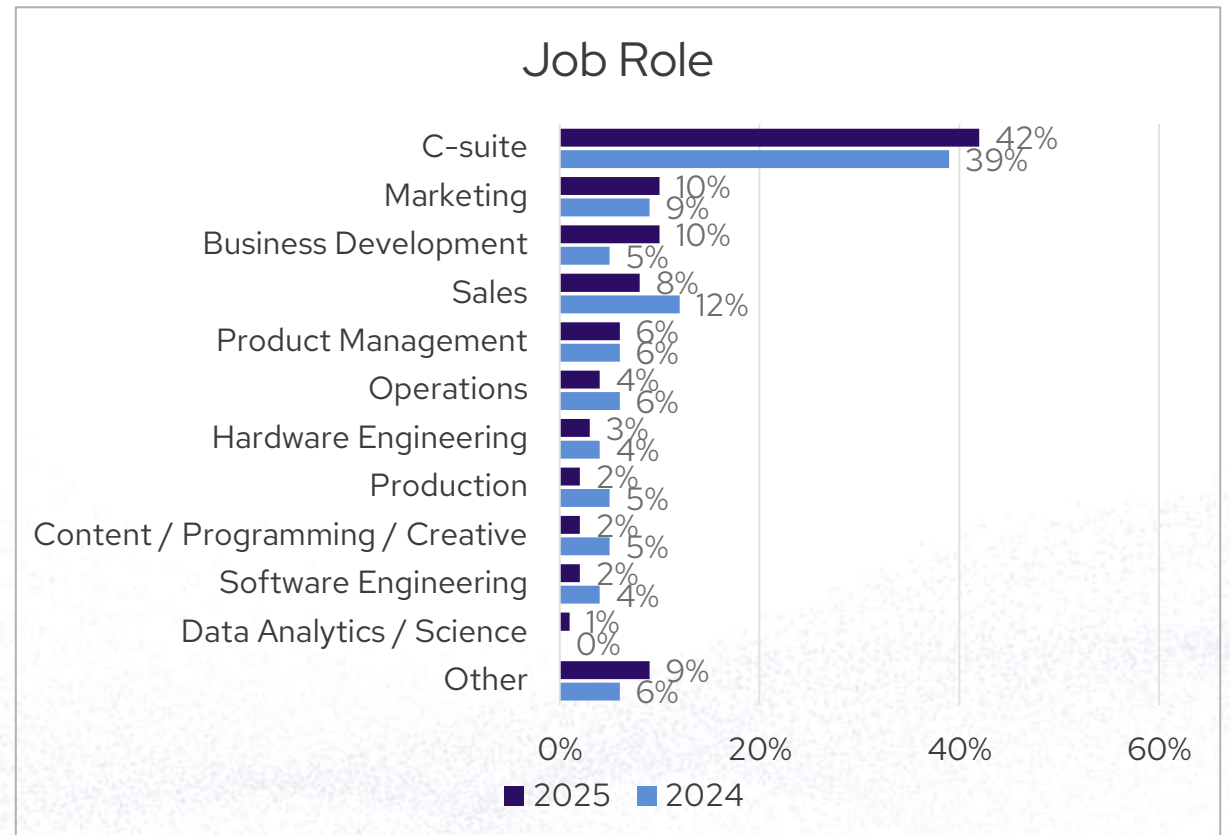
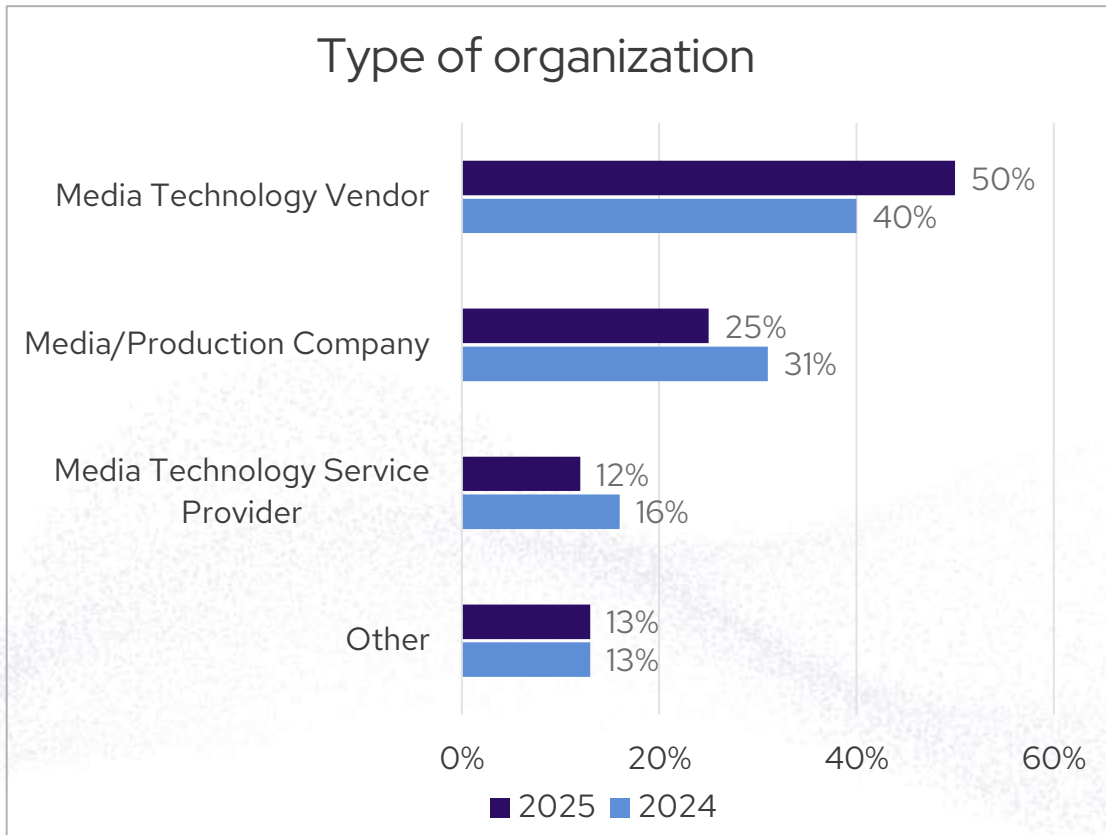
An overview of the contents



- This report is based on exclusive research conducted by IABM before IBC 2025. It aims to provide a strategic analysis of the MediaTech industry with a data-driven focus.
- The main body of this report is divided into three core topical sections:
 - The first section analyses the business environment affecting the MediaTech sector.
 - The second analyses investment and technology adoption trends in MediaTech.
 - The third provides a brief update on key drivers of change in the industry.
- On the following pages, you can find an executive summary of the report highlighting key findings.
- You can find more information on the sources used to produce this report in the Appendix.
- If you have any feedback about this report, or bespoke research enquiries, please contact: insight@theiabm.org.

MediaTech Industry Tracker

Survey includes organizations of all types, with 42% of respondents at C-level



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

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

Source: IABM MediaTech Industry Tracker

MediaTech Industry Tracker

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 Service Providers

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



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.



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.

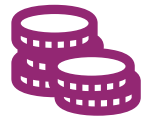
Executive Summary

Key learnings from the research

18 April 2026

State of MediaTech

Common threads in this research



Profitability

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



Transformation

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



Agility

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

Source: IABM

- Business confidence declined globally in 2025 compared to 2024 as the NET outlook for the overall business environment fell by 10% points to 50%. This marks two years of consecutive decline with an increase in year-on-year decline in 2025 as NET outlook for 2024 dropped by 7% points compared to 2023.
- The strength of positive sentiment has also reduced, as the share of respondents with a very positive outlook has fallen by 11% points from 27% 2024 to 16% in 2025. Those with a quite positive outlook has risen by 3% points from 39% to 42% comparing the same time period. This is indicative of a more tentatively positive or even cautious market outlook. 7% cited the business environment as quite negative. 1% of respondents cited the business environment as very negative in 2025; no respondents have given this answer since 2020.
- Business consolidation and job cuts continue to contribute to falling business confidence. In many cases these operational changes are catalysed by companies enacting strategic business transformations.
- More media organizations are committing to business transformation. Comcast and Warner Bros. Discovery have both announced significant restructures to split out linear TV channels into separate entities to allow them to be operated independently to streaming and studio divisions.
- Despite the fragmentation of audiences across platforms and devices CTV (connected TV) is emerging as a key site for revenue generation. CTV presents advertisers with the opportunity to achieve reach and more granular targeting of advertisements. Media owners can increase their advertising revenues while delivering greater personalization to audiences.

- NET investment outlook has fallen from 34% to 18%. The proportion of media technology buyers that expect their budget to increase over the next year has fallen from 49% to 41% whilst the proportion expecting their budget to decline in the next year rose from 15% to 23%.
- After significant acceleration in the investment in AI and ML in 2024, the technology was cited by an even greater proportion of respondents in 2025, becoming the highest-ranking roadmap item, cited by 64% of the 2025 sample.
- The cloud technology investment categories for 2025 are not directly comparable year-on-year to previous MediaTech Industry Tracker results as the IABM Business Intelligence Unit have made updates in response to IABM member feedback to reflect the need for more granular analysis of cloud deployment. This report contains the first set of full year annual results that separate cloud compute, cloud storage, and virtualization as distinct areas of investment, and question further in relation to the use of private and public cloud, as well as preferred payment models.
- Remote production (44%), OTT & streaming (43%), cloud computing (43%) and IP transport & networking (42%) all occupied a similar level of importance in organizations' technology roadmaps when selecting multiple answers, when asked to choose only their main priority, IP transport & networking (14%) was the second most commonly cited technology as a main priority after AI & ML (29%).

- Media streaming companies are focusing on business transformation to make their services more profitable rather than prioritizing audience growth as the main metric of success. The development of ad-tech, search and discovery, and user experience (UX) are all areas of focus that present opportunities for the application of AI & ML as well as other technologies to provide greater personalization based on individual audience members' unique tastes.
- A number of media organizations including BBC and Netflix have released manifestos and guidelines on the application of generative AI. These initiatives allow organizations to begin using generative AI tools in their workflows whilst protecting themselves from the risk of copyright infringement and guaranteeing the rights of performers and intellectual property of artists and brands.
- To help media organizations and audiences differentiate manipulated or synthetic content from original material, interest in the development of technology to guarantee provenance and authenticity is growing.
- Software provides the greatest proportion of media technology vendors' revenues (48%) on average. After a period of increased investment in migration to cloud workflows, hybrid cloud models have prevailed as the dominant architecture and end-users are continuing to invest in hardware where it can deliver higher performance and/or greater cost efficiency. A new generation of software products are anticipated in the near future as the Media eXchange Layer initiative gains momentum.

State of MediaTech

Key Highlights:



- Technology convergence has led to a diverse range of market verticals using professional audio and video products. In 2025 adjacent market verticals outside of broadcast and media were reported to account for 43% of media technology vendors' revenues on average.
- Following from a decline in technology vendors' average revenue share attributed to the broadcast and media vertical, between 2021 and 2023, broadcast and media business registered a second consecutive year of resurgence in 2025. In 2025 broadcast and media accounted for 57% of vendors' total revenue on average, an increase by 5% points compared to 2024.

Business Environment

Key drivers of change in 2025 and beyond

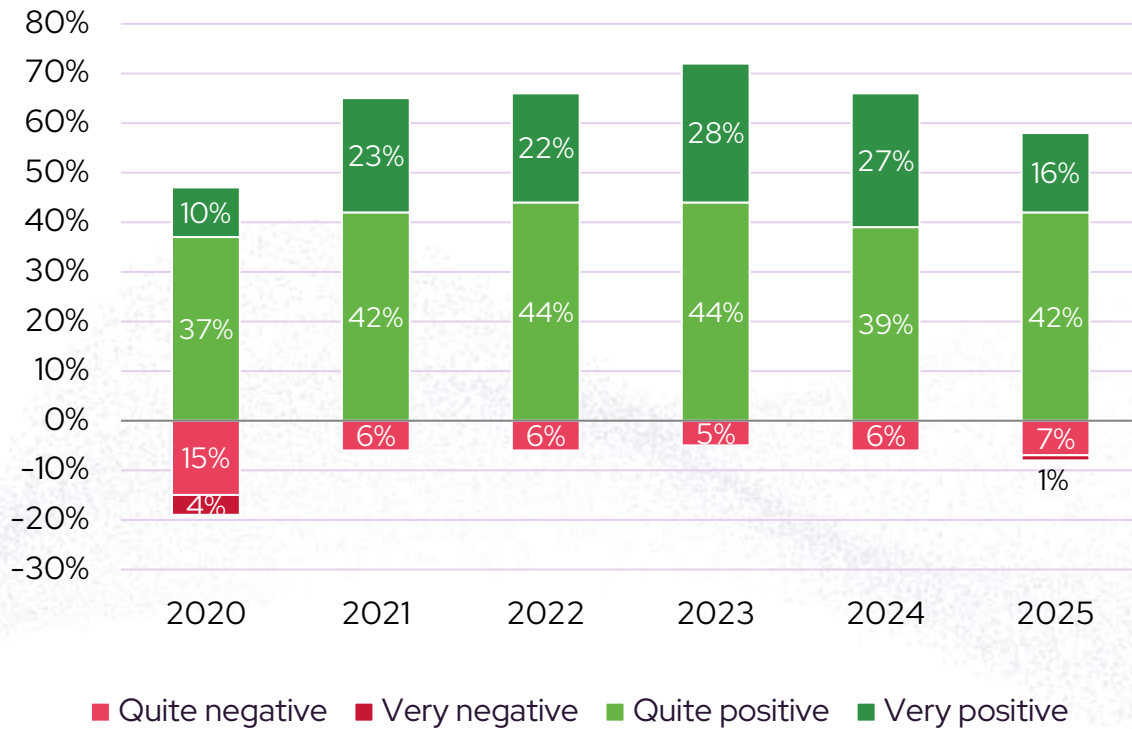
18 April 2026

Business Environment

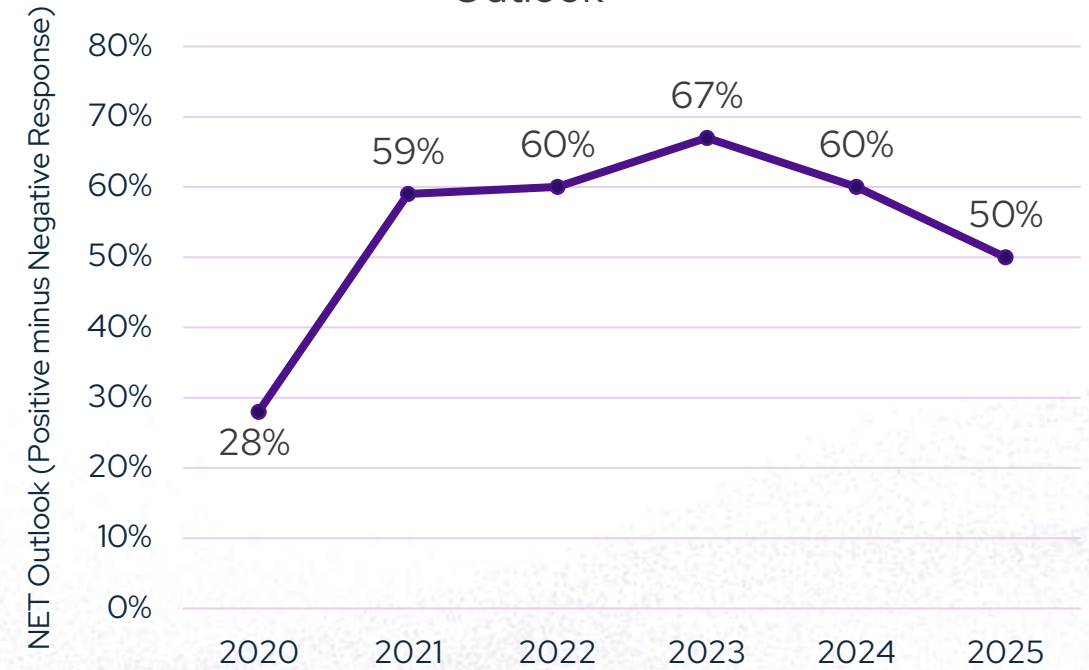
The business environment outlook has slightly worsened compared to last year



MediaTech Business Environment Outlook



MediaTech Business Environment NET Outlook

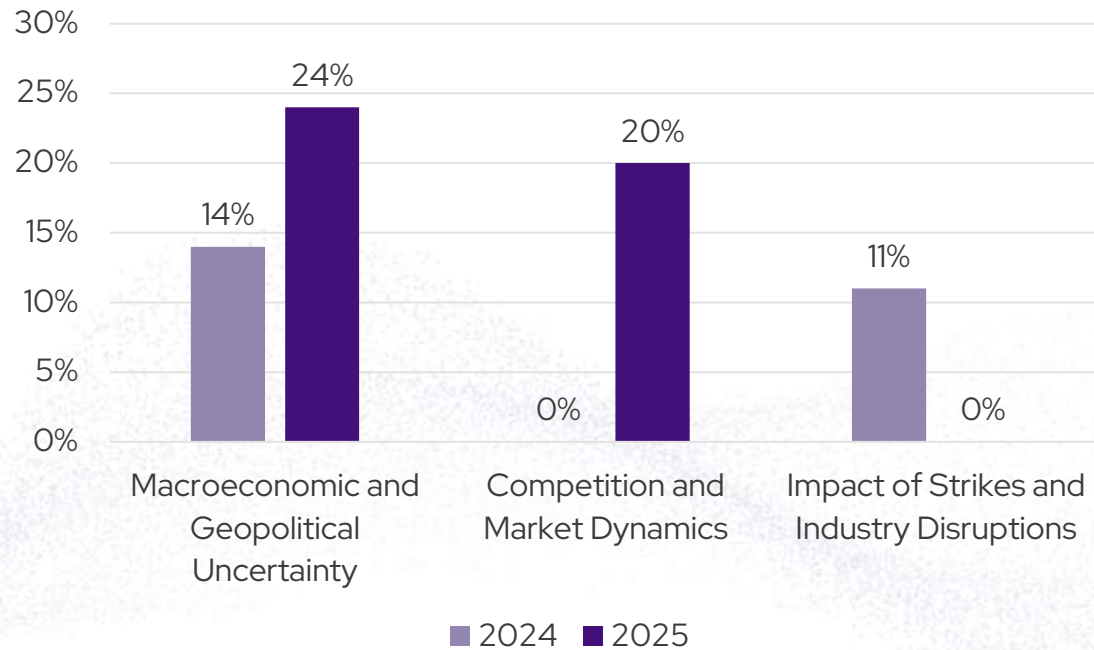


Source: IABM MediaTech Industry Tracker Q. What is your organization's outlook for the overall business environment over the next year? (All Industry)

Business Environment

Uncertainty continues to inhibit decision making

Sentiment Analysis of Additional Comments Made on Business Environment



"Stiff competition (especially globally), tough investments and upgrading period, combined with handling old tech and obsolete buildings/tech. Between a rock and a hard place..."

"The industry seems energized and coming out of the supply issues which created excess inventory that has almost been burned through. Macroeconomics and geopolitics are a big uncertainty for everyone though."

"There is a great deal of uncertainty due to the political climate, FCC deregulations, and the future of NextGen TV."

Q. What is your organization's outlook for the overall business environment over the next year? Based on text analysis of open-ended responses. (All Industry. Sample size 2024 n=36, 2025 n=46)

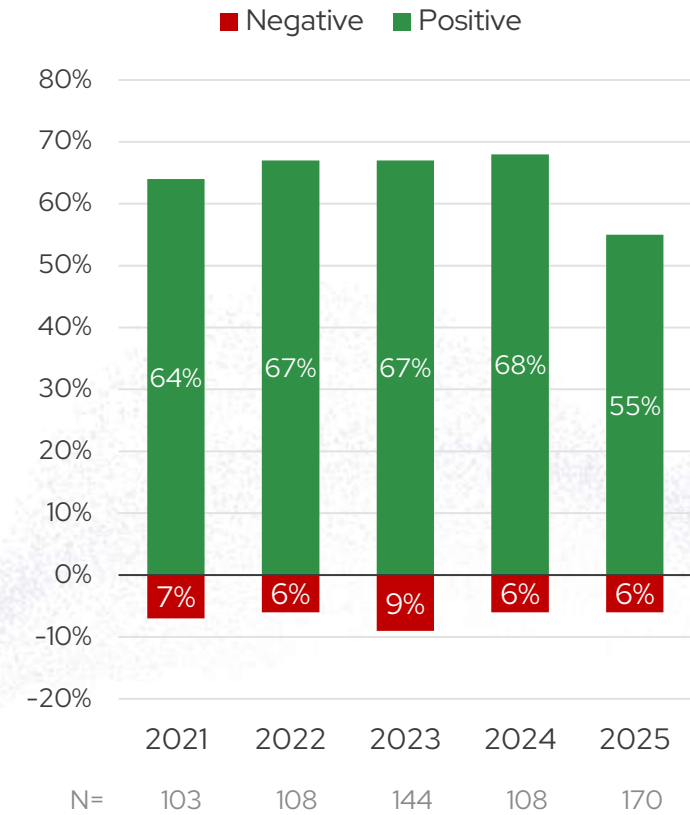
Source: IABM MediaTech Industry Tracker

Business Environment

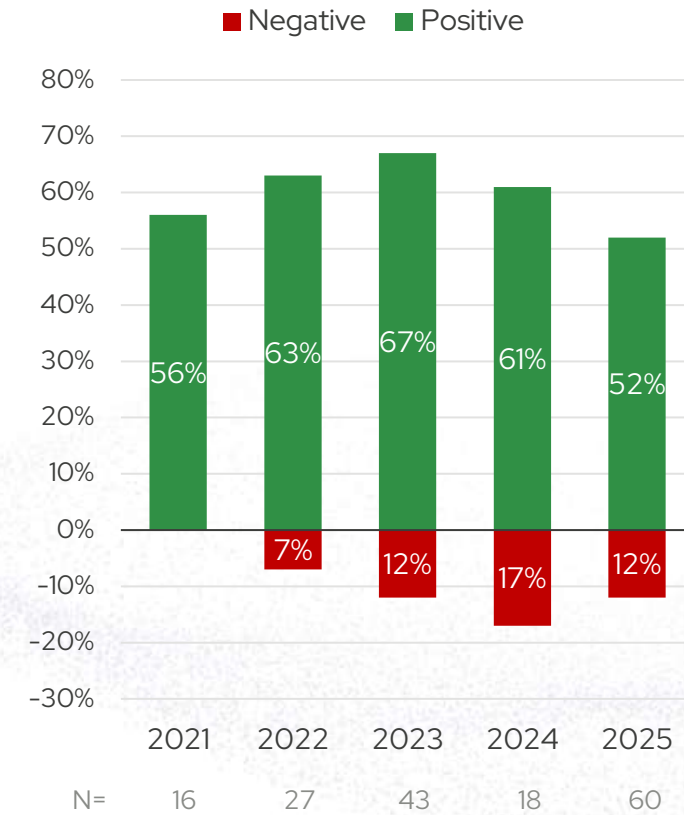
The decline in business confidence is mainly attributed to EMEA & APAC



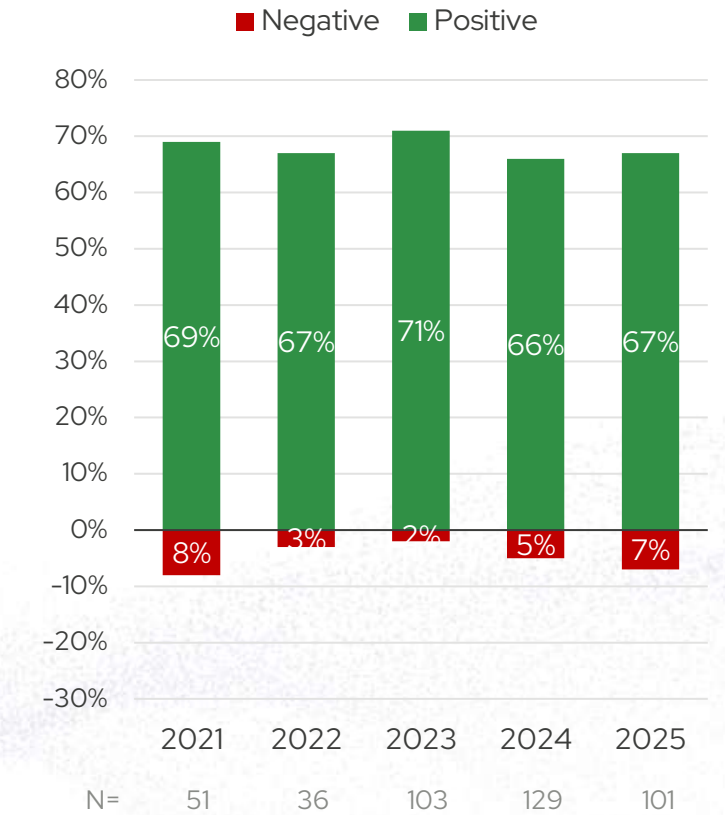
EMEA



APAC



Americas

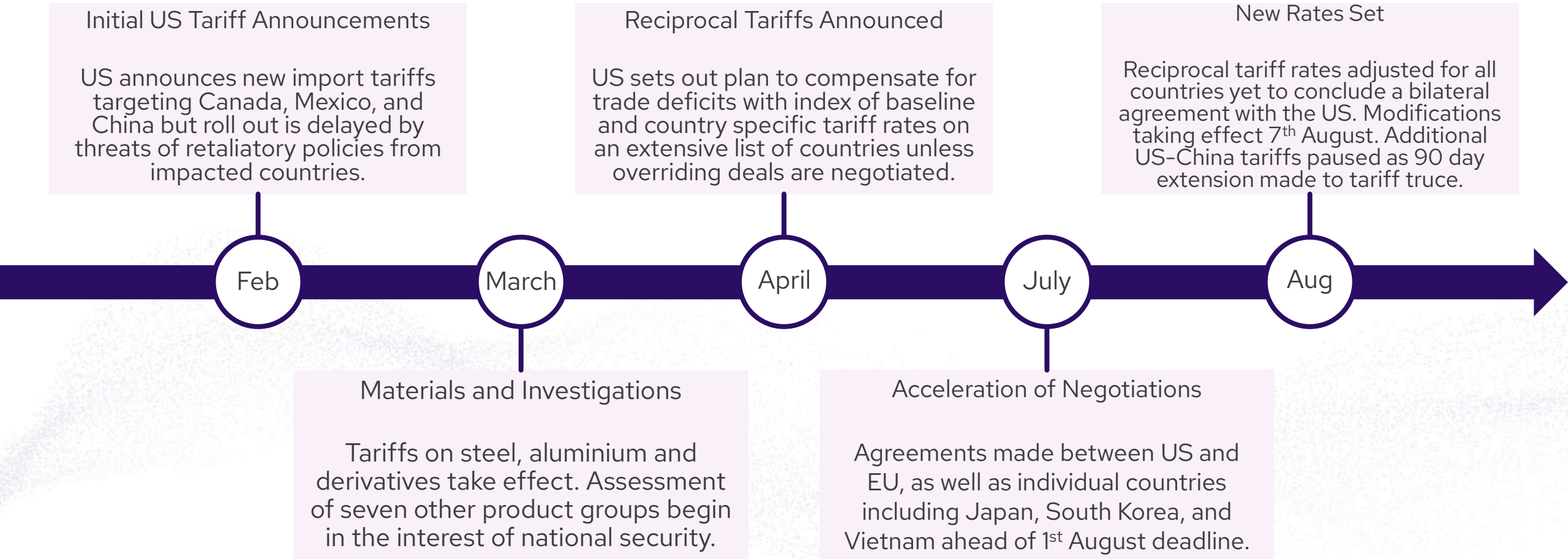


Source: IABM MediaTech Industry Tracker

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

Business Environment

Ongoing trade negotiations feed market uncertainty



Source: Peterson Institute for International Economics

Please note the above timeline is intended as a retrospective summary of key milestones in ongoing US trade policy development as of September 2025. It does not represent an exhaustive list of all policy updates introduced in this period.

Business Environment

Intel central to US semiconductor supply chain



US Government Funding Source



■ US CHIPS and Science Act Grants ■ Secure Enclave program

CHIPS and Science Act

Grants awarded to incentive investment in semiconductor manufacturing in the US. Intel has received \$2.2 billion in grants prior to the announcement of the investment in common stock, equating to an overall total of \$11.1 billion in government investment.

Secure Enclave

Department of Defense initiative aims to establish end-to-end production capability for advanced semiconductors for military application.

Source: Intel

Business Environment

Industry collaboration accelerates transition to live and on-demand streaming



In August 2025, Disney finalized its partnership with the NFL that gives the NFL a 10% equity stake in ESPN, valued between \$2-3 billion, while ESPN acquires the NFL Network, NFL RedZone, NFL Fantasy, and other media assets from the league. Disney aims to boost ESPN's profitability while NFL leverages Disney's distribution for expanded reach. The deal is part of a broader trend of streamers investing in live content (particularly sports) to reduce churn and increase ARPU.

In June 2025, Netflix signed a strategic partnership with French broadcaster TF1 to stream their programming live and on-demand starting summer 2026. This move marks a precedent for aggregating live TV with streaming content.

Streaming service provider in Earnings Call

*The fundamental purpose for this TF1 partnership is all about that goal of **expanding our entertainment offering**. How do we enhance the value we deliver to members? We want to provide more content, more variety, more quality. So just as you've seen us do with licensing and production, this is just another mechanism to expand that offering. And in this case, **it's specifically about highly relevant local for local content** in a country that has strong demand for that local content. This is an accelerated way to satisfy that need.*

Gregory K. Peters, Co-Chief Executive Officer &
Director at Netflix
(June 2025)

NETFLIX

Source: Netflix

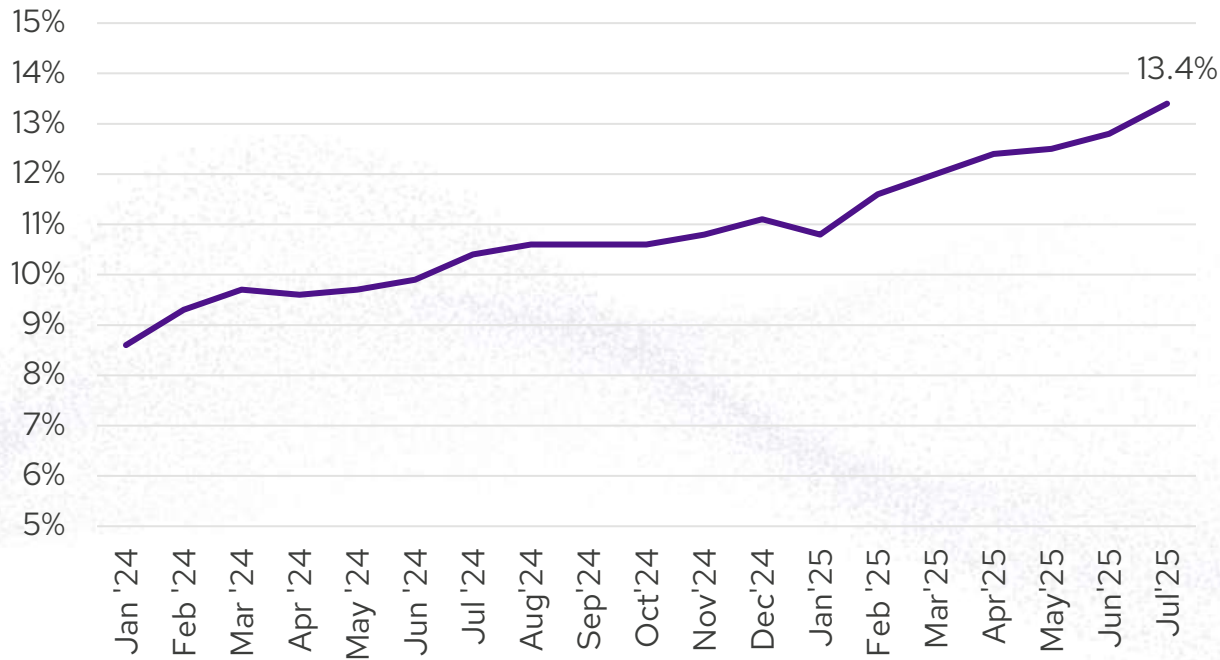
Business Environment

Social media are reshaping media landscape, introducing new business models



YouTube continues to grow its share of TV viewing in the US, maintaining its position as the leading media distribution channel.

YouTube's share of TV viewing in the US



Source: IABM, Nielsen, Bundesliga

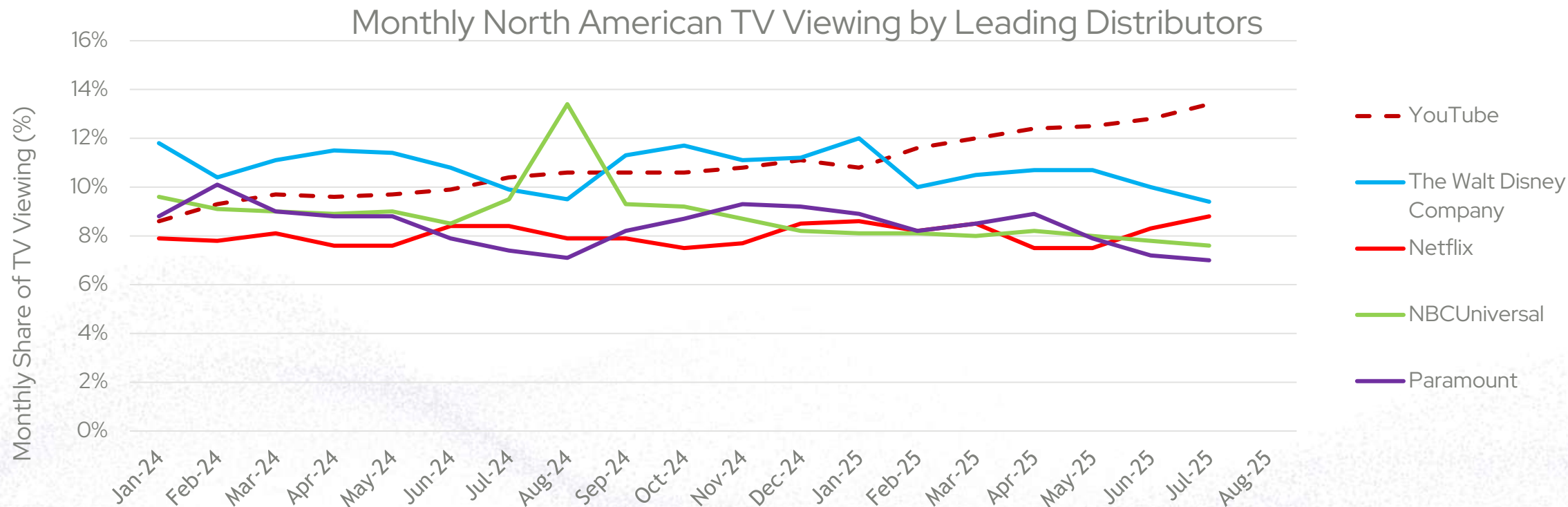
Social media in sports rights

In August, Bundesliga International became the first major European league to hand some media rights to content creators and influencers. YouTube will stream up to 20 matches on its influencer-run channels, marking a radical shift in rights distribution.

Prime Video has also been granted exclusive rights to stream all Sunday matches on a pay-per-view basis in the UK.

Business Environment

YouTube's leading share of TV viewing is still rising



After superseding all competing media distributors for the first time in terms of monthly viewing share on TVs in the US in July 2024, YouTube has established a consistent leadership over the past six months. Advertisers are recognising YouTube as a destination for longer form advertising and annual digital ad spend for YouTube ad campaigns on TV screens, as opposed to mobile, is rising.

Source: IABM, Nielsen Gauge

Business Environment

Diverging approaches to the future of linear broadcast are taken



The Future of Linear Channels

Linear channels are under scrutiny as media organizations register a decrease in revenue and viewership for these assets. While brands such as Paramount, a Skydance Company have asserted that these assets still hold value, they are clear that transformation is necessary.

Comcast on the other hand has taken a more direct approach spinning off select cable television networks into an independent media business, Versant. The Versant portfolio is composed of assets that brought in \$7 billion in revenue in the year ending September 30, 2024, including USA Network, CNBC, MSNBC, Oxygen, E!, SYFY, and Golf Channel as well as the digital assets Fandango, Rotten Tomatoes, GolfNow and Sports Engine.

Media organization press release

We're thinking about the cable network not as declining linear assets that we need to split up or deal with somehow. We're thinking about those brands that we have to redefine [...] our intention is to keep the company together and invest through that lens long term.

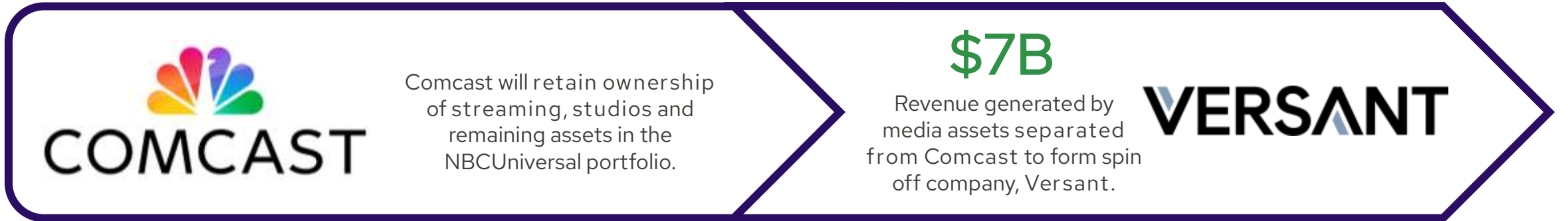
David Ellison, Chairman and CEO
Paramount, a Skydance Corporation
(August 2025)



Source: IABM, Comcast, Paramount, a Skydance Corporation

Business Environment

Comcast spin off Versant to focus on individual brands



Source: Comcast

Business Environment

Warner Bros. Discovery splits in two to navigate network decline



Warner Bros. Discovery Annual Revenue Generated by Source



Business Transformation

In June 2025 Warner Bros. Discovery announced the organization would be separated into two publicly traded companies with the aim of growing streaming and studios without being held back by linear network operation.

The streaming focused entity will hold leading IP including Warner Bros, DC Studios and HBO Max. The other will hold network brands including CNN, TNT Sports and Bleacher Report.

Source: WarnerBros Discovery Company Filings

Business Environment

Transformation continues to define media organizations' strategies



Business Transformation

After a two-year merger process between Paramount and Skydance, Chairman and CEO, David Ellison outlined his vision for the new unified company, Paramount, a Skydance Corporation, in August 2025.

The message highlighted their focus on direct to consumer offering and positioning Tubi as a top-of-funnel gateway into Paramount+.

The organization will reduce its technology spend by migrating to a single technology platform in pursuit of efficiency and performance gains.

Media organization press release

We recognize that sustained, profitable growth is not achievable in today's relentlessly dynamic market without far-reaching changes that will make us a leaner, faster, smarter, and more agile company. Toward that end, the coming months will be defined by a series of focused efforts to reengineer how our company operates, produces its creative content, and goes to market."

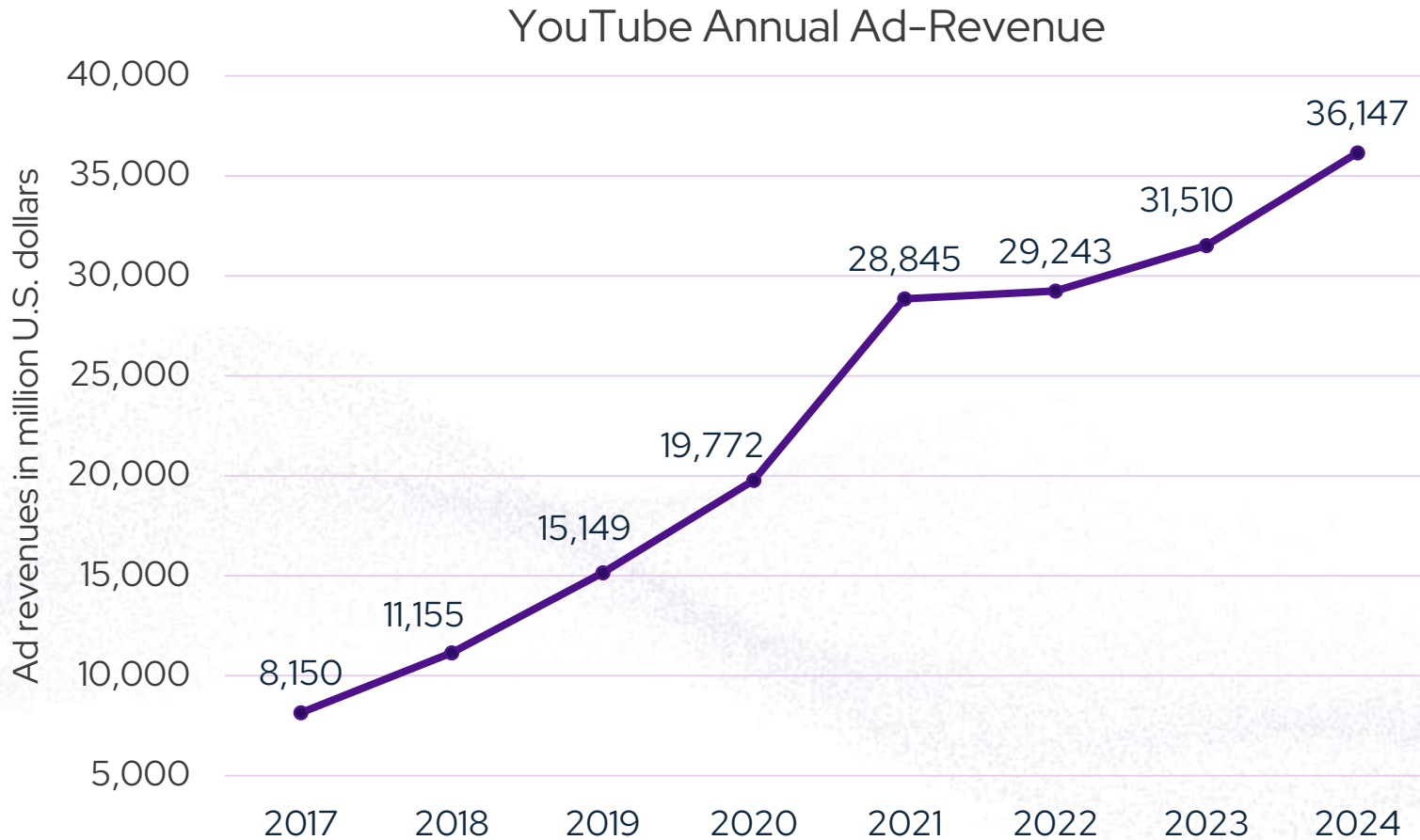
David Ellison, Chairman and CEO
Paramount, a Skydance Corporation
(August 2025)



Source: IABM, Paramount, a Skydance Corporation

Business Environment

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



90B

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



\$18.5B

Ad revenue earned by TikTok in 2024



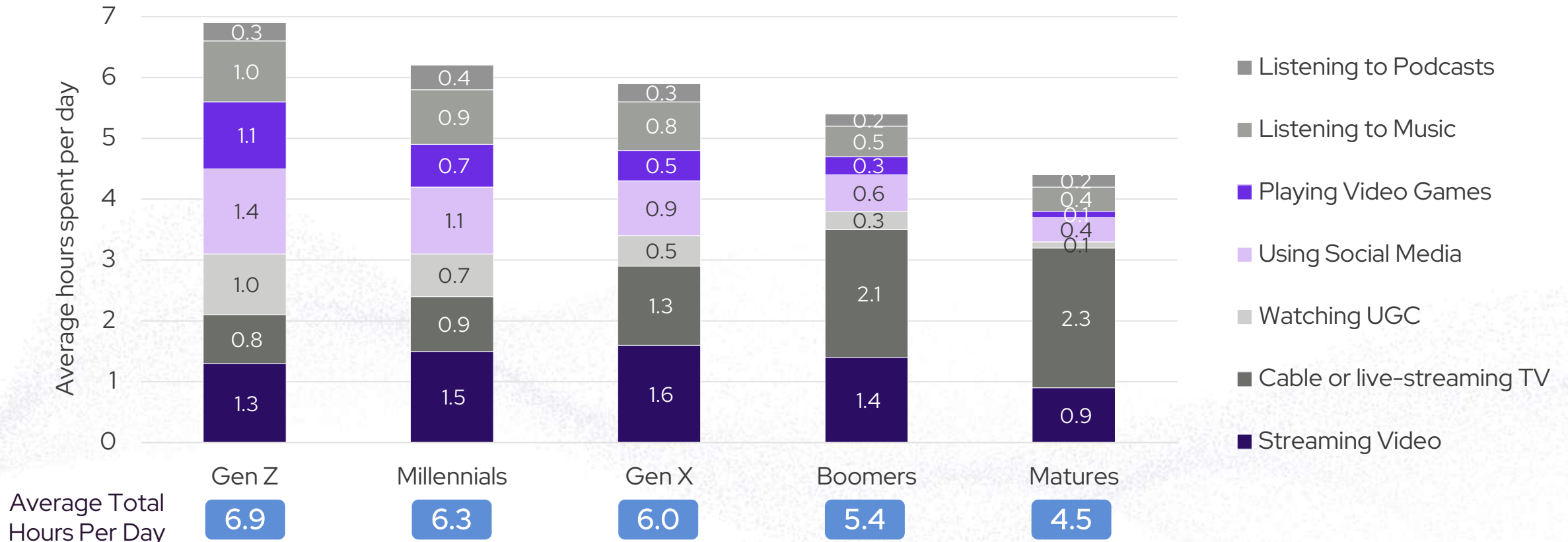
Source: IABM, YouTube, TikTok Company Filings

Business Environment

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



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



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

Source: IABM, Deloitte Digital Media Trends, 19th Edition (March 2025)

Business Environment

Amazon and Roku partner for CTV authentication



Unified Measurement

Roku and Amazon announced their partnership in June 2025 to unify authenticated logged-in audiences across their platforms.

With Roku's leading position in media streaming the partnership provides advertisers access to the largest CTV solution for North American market.

Roku operating system, The Roku Channel, Amazon Fire TV, and Amazon Prime Video. Viewer data can be shared across different streaming channels and devices to enable more accurate measurement and tracking than before combining data from Roku Platform and Amazon DSP Insights.

Media company in press release

This collaboration delivers a unified, future-ready solution at an unprecedented scale, one designed to drive measurable outcomes by unlocking performance across CTV

Charlie Collier, President

Roku Media

(June 2025)

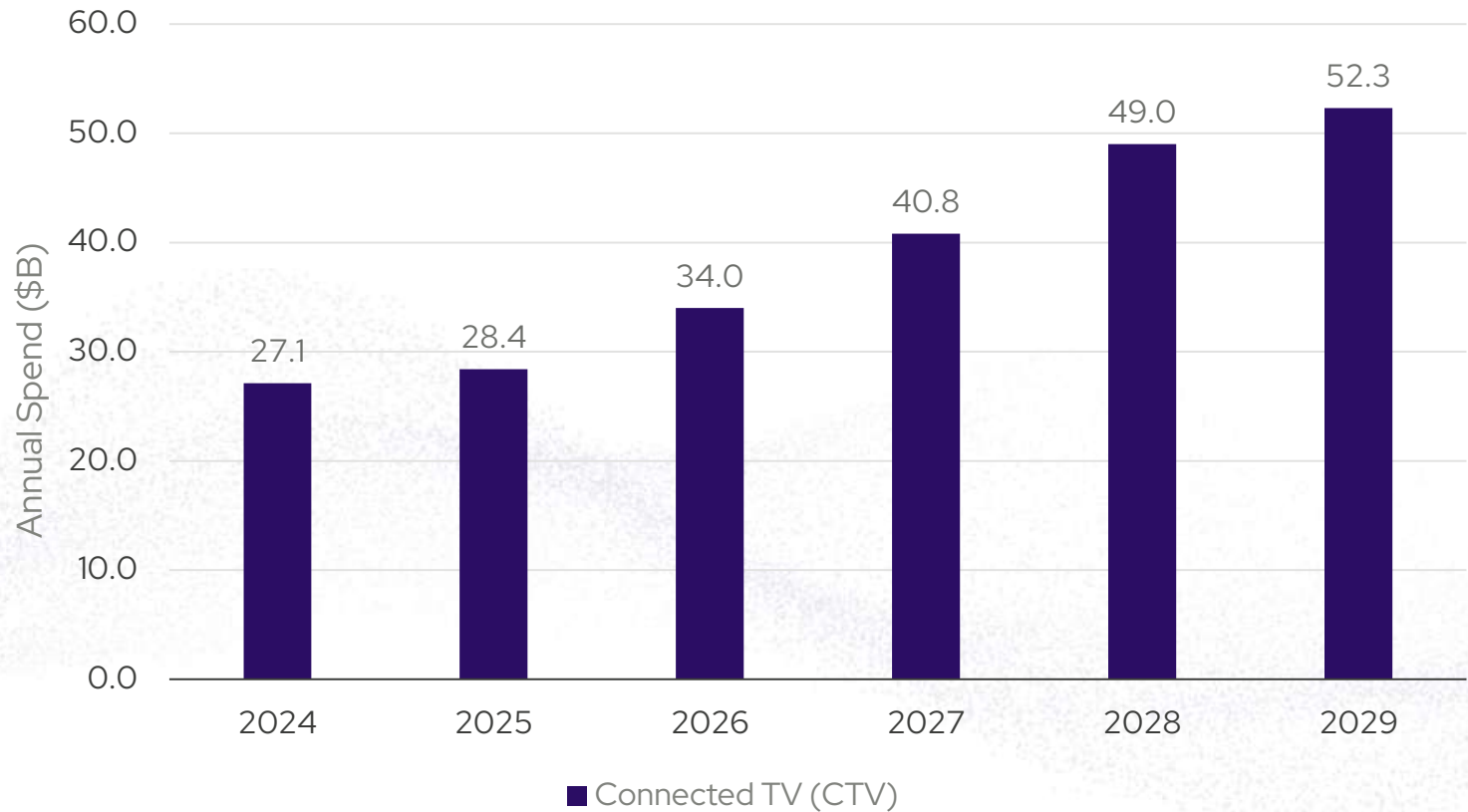


Business Environment

CTV a key destination for advertising spend



Worldwide Connected TV Spending



Streaming Growth Enhances CTV Ad Spend

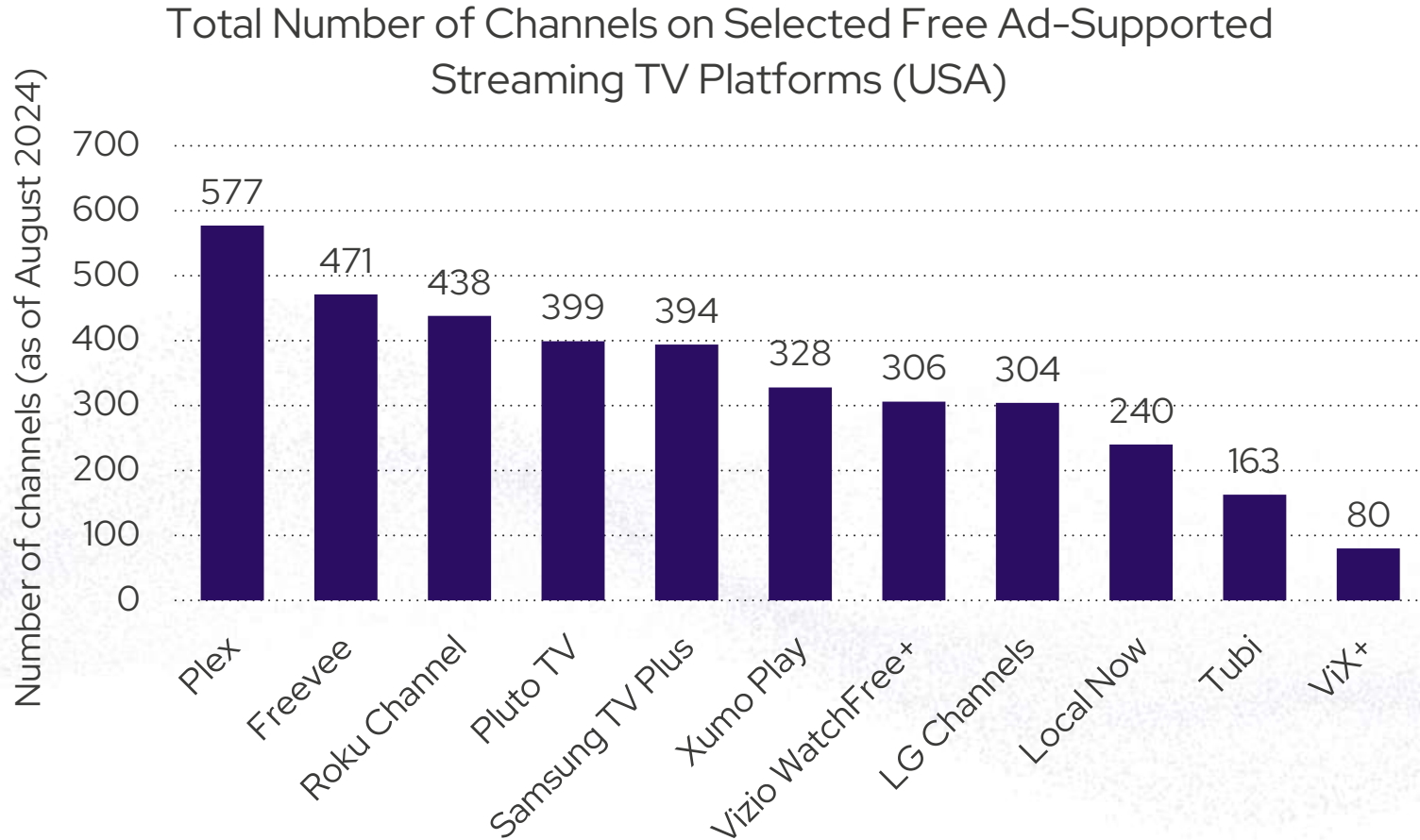
CTV (connected TV) enables advertisers to deliver targeted advertisements based on user data, viewing habits and demographics.

IDC forecasts 14.1% CAGR for worldwide CTV spend over the next five years.

Source: IDC Worldwide Retail Media Network and Connected TV Forecast, 2025-2030

Business Environment

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



FAST Channels Proliferate

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

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

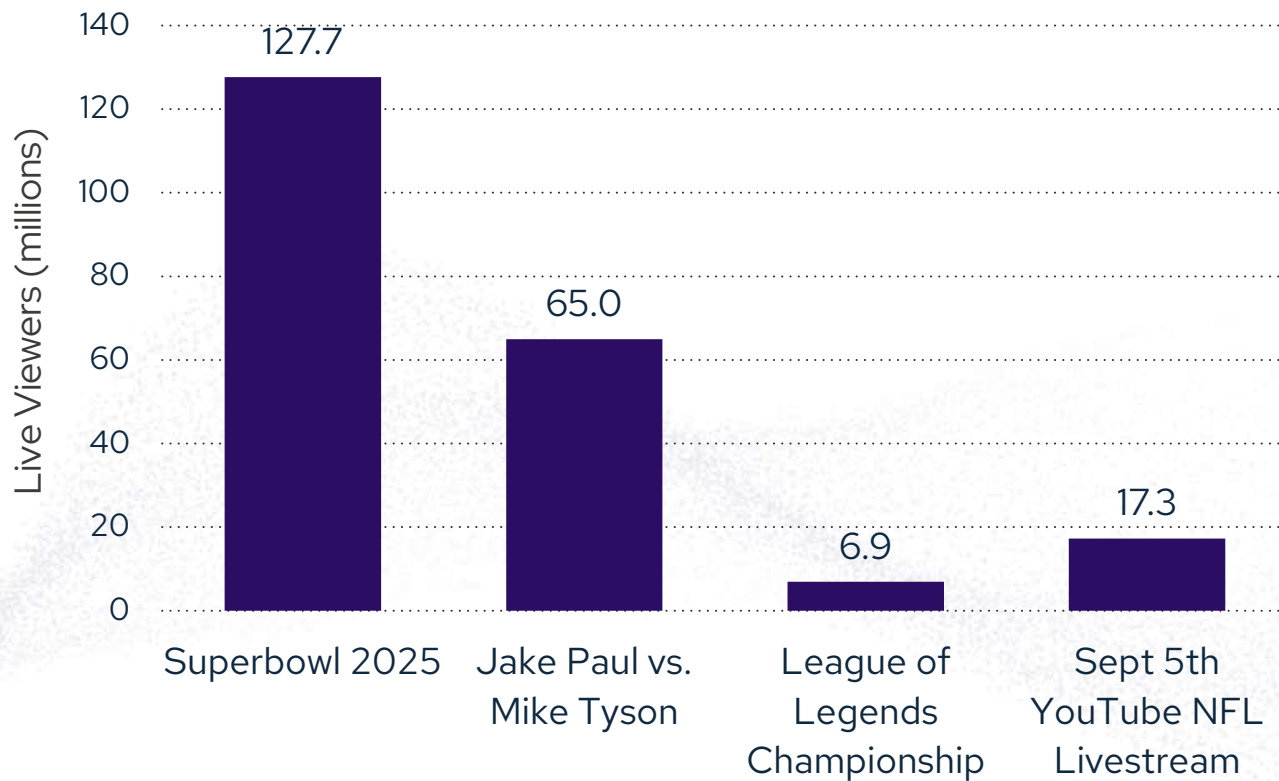
Source: Statista

Business Environment

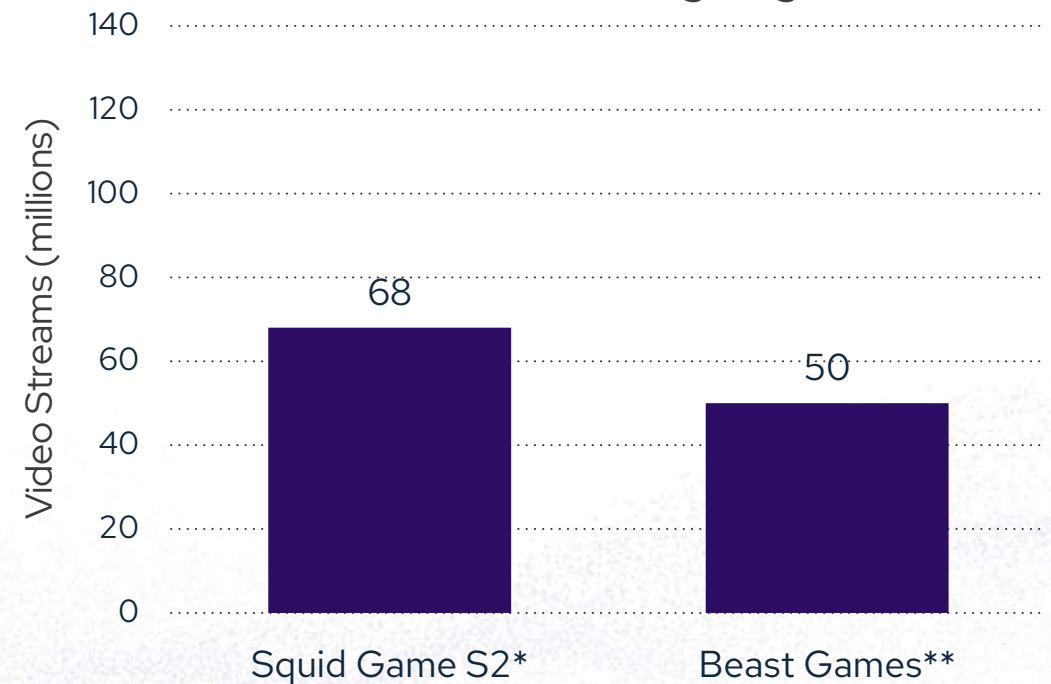
Creator led-content delivers promising results for streamers in 2024



Viewership comparison of selected live sports events



Viewership comparison of selected on demand streaming originals



*Netflix reported premiere 1 week total

**Amazon reported 25-day total

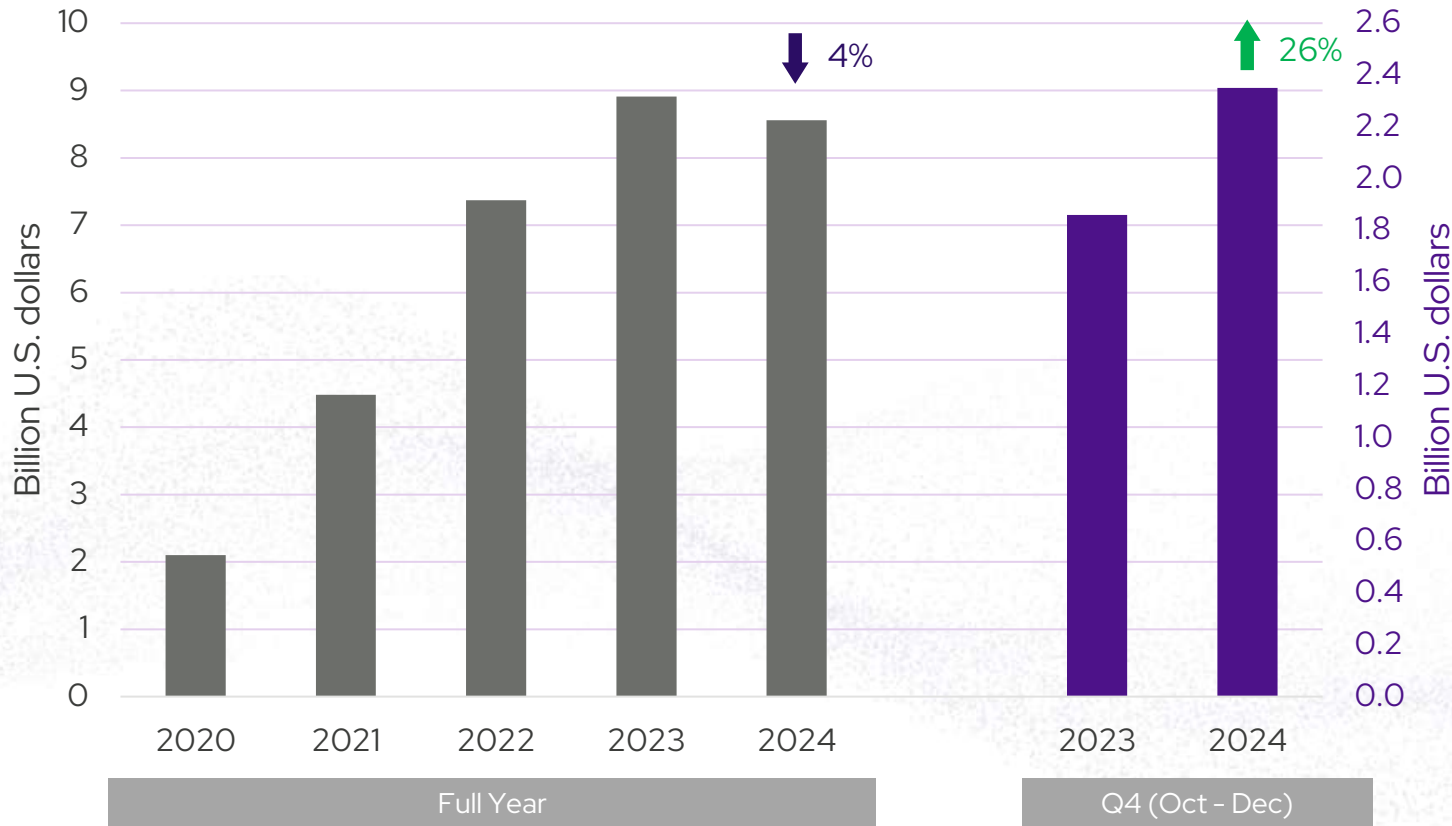
Source: Company Filings

Business Environment

Held over impact of strikes limits 2024 box office total



Box office revenue in North America



Battling the Content Gap

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

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

Source: IABM, Box Office Mojo, Los Angeles Times

Business Environment

2025 box office successes evidence importance of theatrical release



Improving prospects for the global box office have been tied to an improving slate of releases from major studios as the past two years suffered from a limited pipeline of productions due to the impact of the WGA and SAG-AFTRA strikes. A number of standout box office successes in 2025 YTD evidence the continued importance of theatrical releases for feature films to build prestige and generate word of mouth to stimulate engagement with titles not only in the cinema but also on streaming services. Disney's 2025 live action remake of *Lilo & Stitch* was able to contribute a global box office of \$1.04b for Disney despite being originally slated as a straight to streaming exclusive.

Although superhero titles have dominated box office leaderboards over the past decade, IP from video games are increasingly being explored for development due to the franchise potential built into IP with established media universes.

Titles shot for IMAX are able to generate higher average ticket sales through premium release strategies on larger cinema screens.

\$1.04B

Second highest grossing film globally in 2025 YTD, *Lilo & Stitch* was originally slated as an exclusive streaming release for Disney+



\$957.8M

A Minecraft Movie, the latest in a wave of successful video game adaptations, ranks third highest global for theatrical revenue YTD.



20%

North American box office revenue earned by *Sinners* through IMAX distribution



Source: Box Office Mojo

MediaTech Investment

Key drivers of change in 2025 and beyond

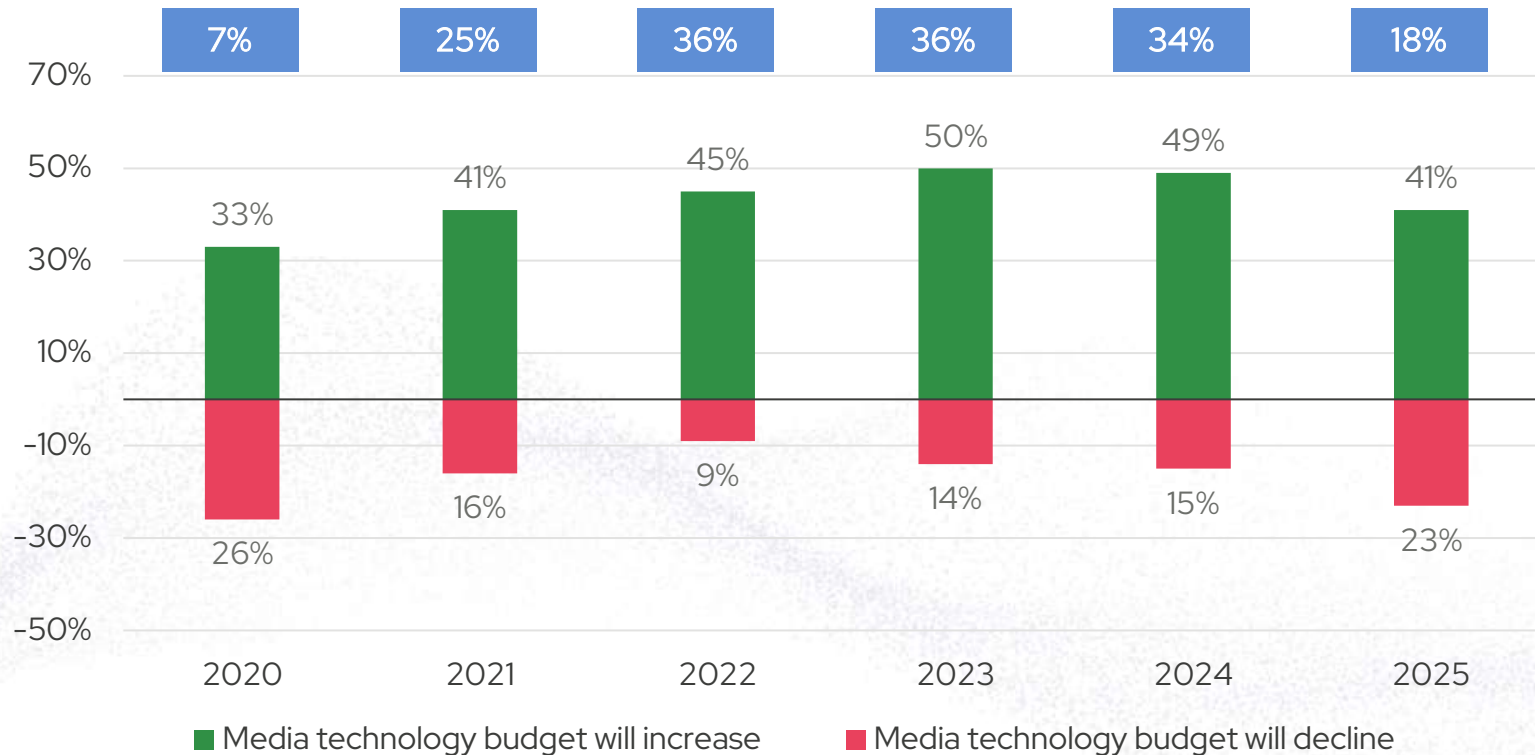
18 April 2026

MediaTech Investment

Investment is expected to be more conservative in the year ahead



MediaTech NET investment outlook



MediaTech Budgets

The less optimistic business environment outlook correlates with media technology investment, which is lower than a year ago, though still positive overall.

This decline in media technology investment is primarily driven by broadcasters, Pay-TV, and production companies. Meanwhile, streaming service providers are moving in the opposite direction, with 80% reporting their media technology budgets will increase next year.

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

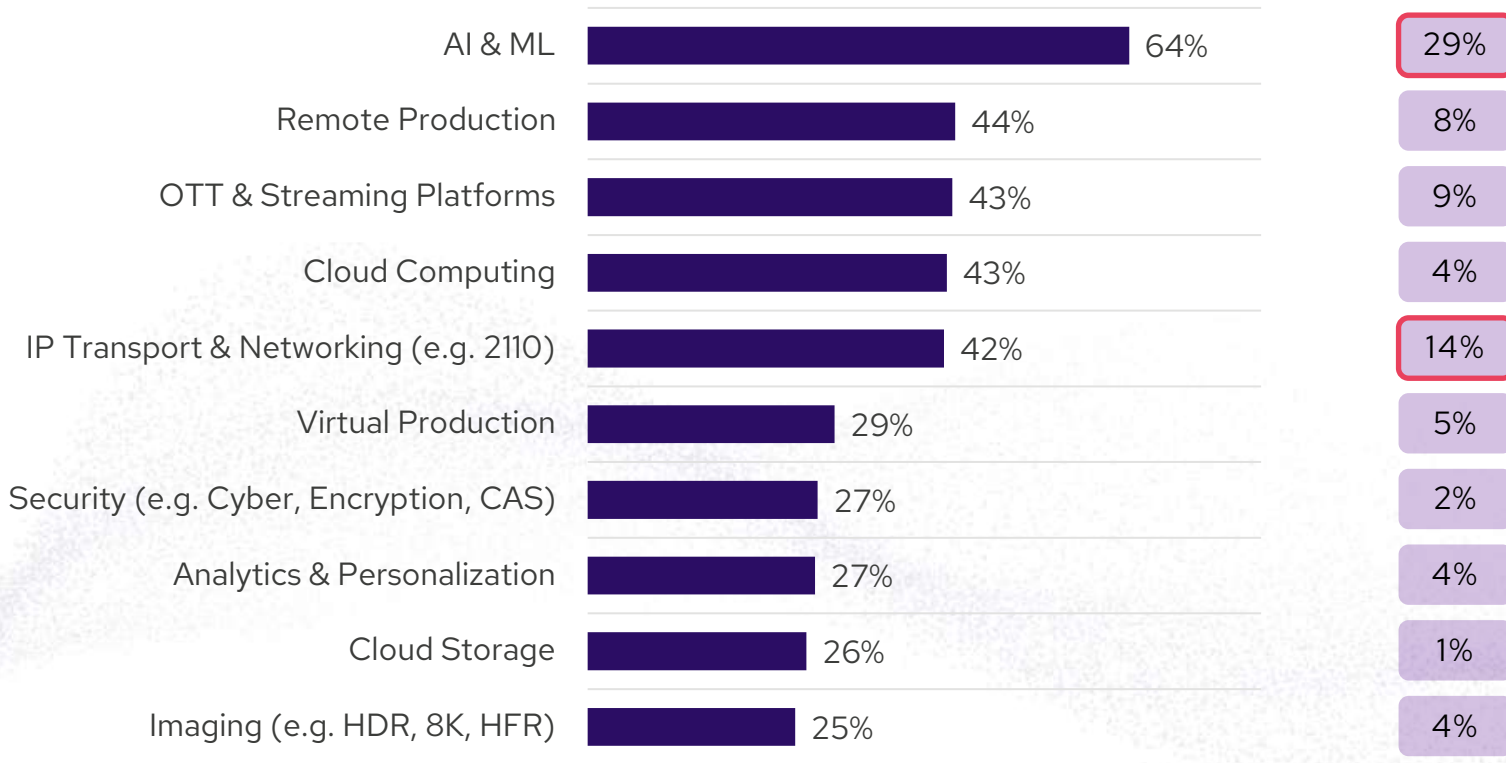
Source: IABM MediaTech Industry Tracker

MediaTech Investment

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



Technology Roadmap Priorities (Top 10) Main Priority



Artificial Intelligence

Artificial Intelligence and Machine Learning (AI & ML) is the top priority, with 64% of the industry considering it among the most important trends in their technology roadmaps.

IP transport & networking ranks second among the five most important trends when respondents were asked to prioritize just one technology. This represented one-third of all respondents who cited it as a priority in their technology roadmaps.

Q. What are the most important trends in your organization's technology roadmap? (All industry, 2025, n=300)

Source: IABM MediaTech Industry Tracker

MediaTech Investment

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



Rank	2024		2025	
1	AI & ML	51%	AI & ML	69%
2	OTT & Streaming Platforms	46%	Remote Production	46%
3	IP Transport & Networking	42%	OTT & Streaming Platforms	43%
4	Virtual Production	33%	IP Transport & Networking	42%
5	Social Media	32%	Virtual Production	41%
6	Remote Production	31%	Security (e.g. Cyber, Encryption, CAS)	26%
7	Targeted/Programmatic Advertising	29%	Imaging (e.g. HDR, 8K, HFR)	25%

Source: IABM MediaTech Industry Tracker

Q. What are the most important trends in your organization's technology roadmap? (All industry, 2024 n=230, 2025 n=300).

Note: Cloud has been excluded from the analysis due to a change in methodology

MediaTech Investment

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



Rank	Q1 2025		Q3 2025	
1	AI & ML	60%	AI & ML	69%
2	OTT & Streaming Platforms	46%	IP Transport & Networking	46%
3	Remote Production	45%	Remote Production	43%
4	Cloud Computing	43%	Cloud Computing	42%
5	IP Transport & Networking	39%	OTT & Streaming Platforms	41%
6	Virtual Production	33%	Virtual Production	26%
7	Analytics & Personalization	33%	Security (e.g. Cyber, Encryption, CAS)	25%

Q. What are the most important trends in your organization's technology roadmap?
 (All industry, Q1 2025 n=150, Q3 2025 n=150)

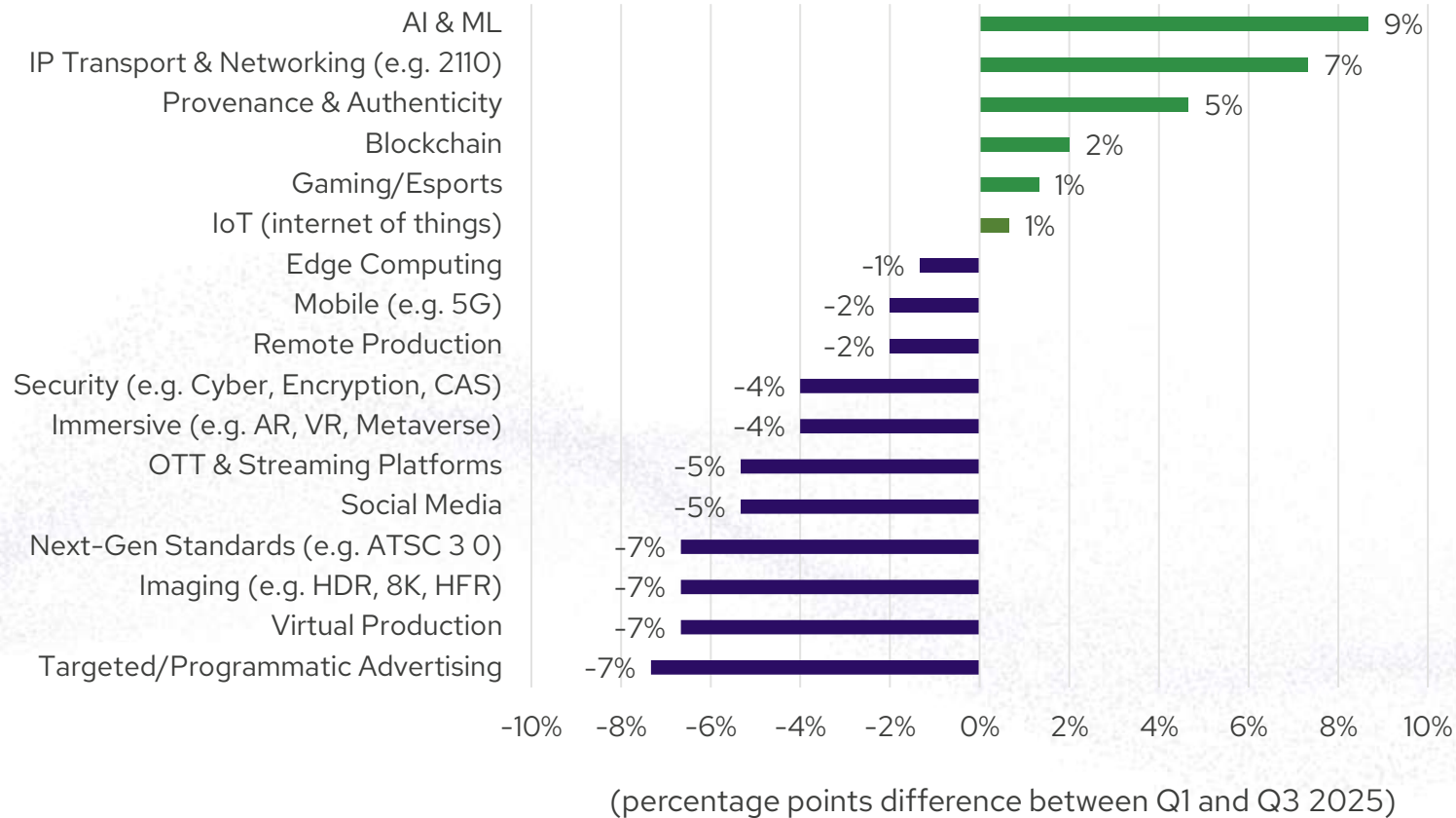
Source: IABM MediaTech Industry Tracker

MediaTech Investment

Transition to IP-based workflows is accelerating rapidly in 2025



MediaTech technology roadmap



IP Transport & Networking

The transition to IP-based workflows is accelerating rapidly in 2025, gaining 7pp in Q3 2025 compared to Q1 2025.

Artificial Intelligence

The rise of AI & ML has heightened the need for investment in provenance and authenticity to ensure audience trust – a trend that began gaining traction in 2025.

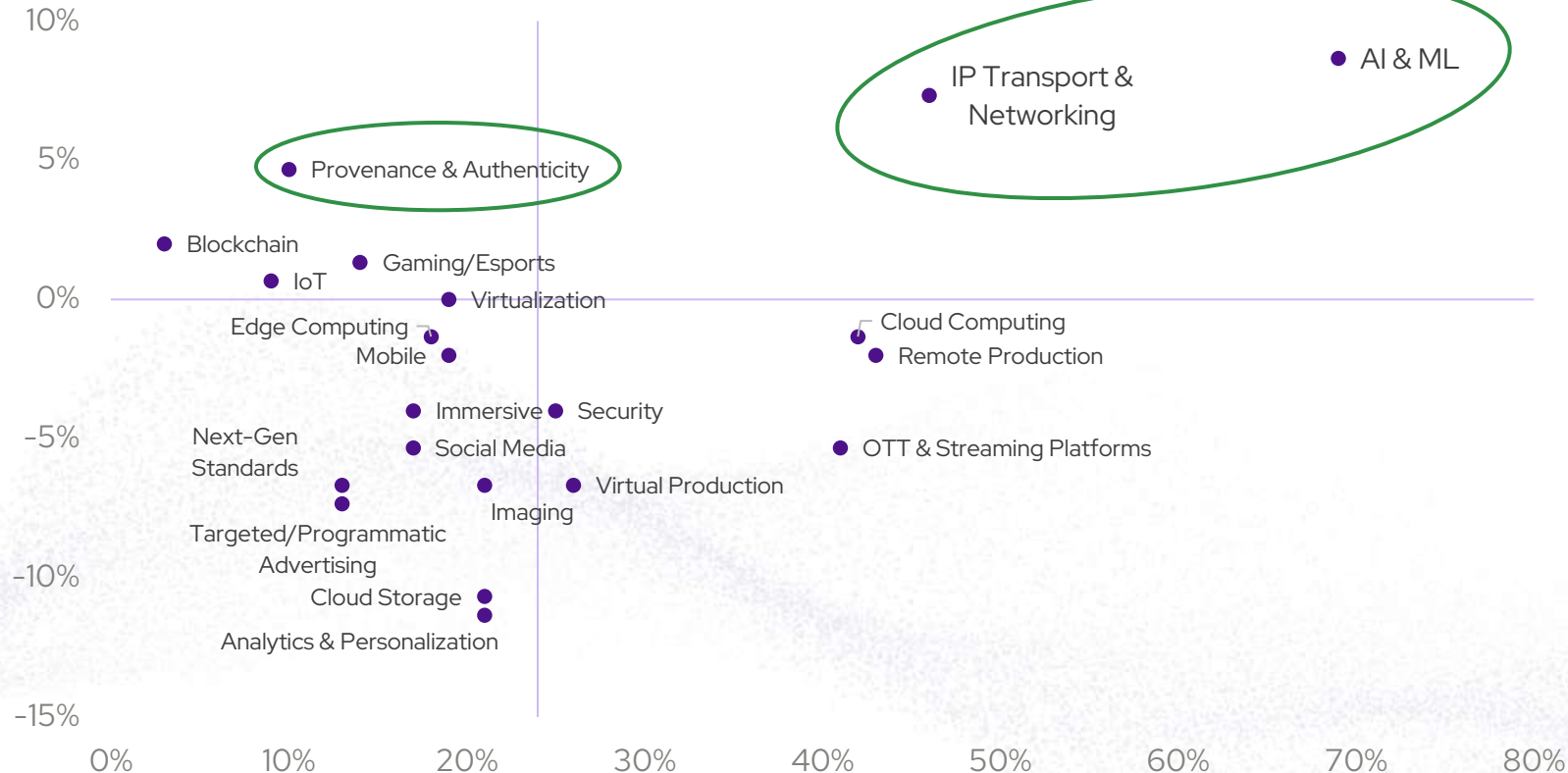
Source: IABM MediaTech Industry Tracker

MediaTech Investment

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



Technology Roadmap



Artificial Intelligence

Artificial intelligence and IP experienced the greatest increase in Q3 2025 compared to the beginning of the year.

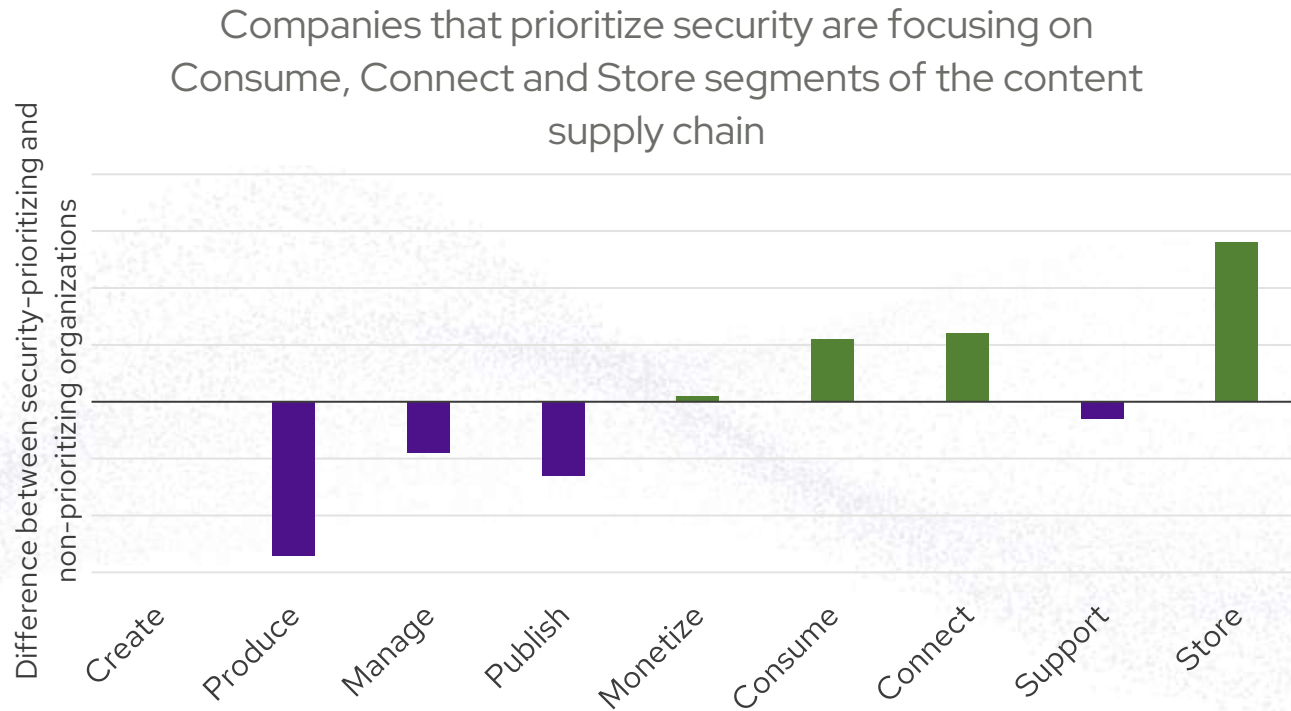
Provenance & Authenticity

The emerging trend of provenance and authenticity is gaining traction during the year.

Q. What are the most important trends in your organization's technology roadmap?
(All industry, Q1 2025 n=150, Q3 2025 n=150)

Source: IABM MediaTech Industry Tracker

The highly fragmented streaming landscape and the vulnerability of streaming devices is shifting security investment to the latter stages of the content supply chain. The attack surface is now much larger due to software-defined workflows and the fact that the majority of audiences are consuming content on open devices, where various third-party software can be installed.



MediaTech Supplier in an IABM interview

This is not to say that content owners and production companies don't need to be careful about it – they definitely need to be careful in having the right measures in place – but if you see most of the piracy is happening downstream from that, really on the distribution side. I would say, 99.9% of the effort should be on the distribution side. That's really where most of the issues are happening.

Rodrigo Fernandes
Product Director Content Security
Irdeto
(June 2025)



Source: "Security in MediaTech Ecosystems" Megatrend Report. Data collection period: February–March 2025, N=150
Source: Security in MediaTech Ecosystems Megatrend Report

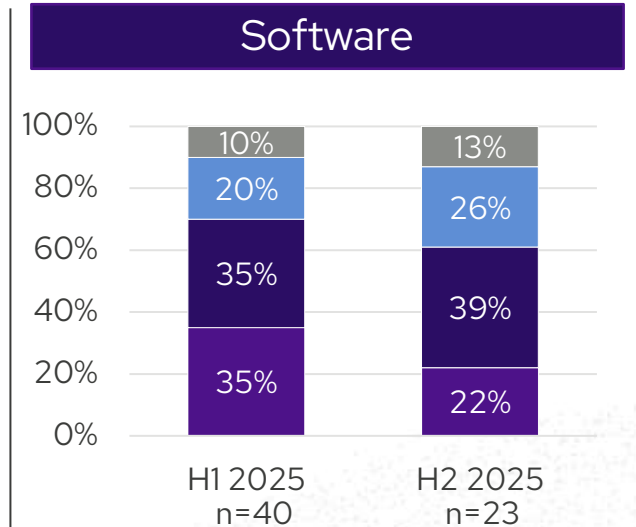
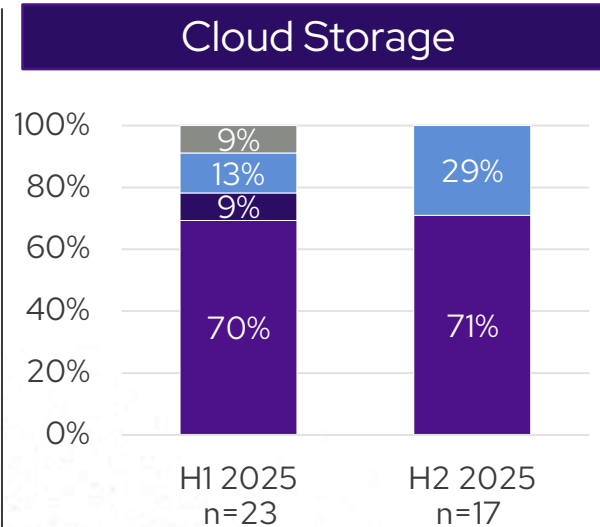
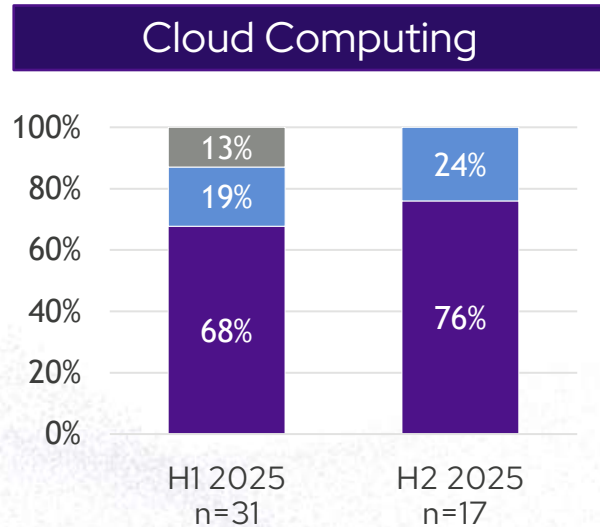
MediaTech Investment

Software and cloud services investment outlook and payment models

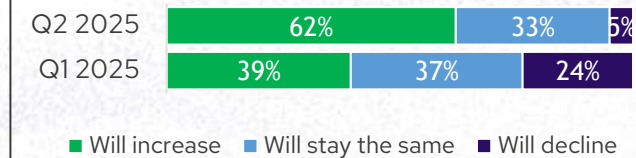
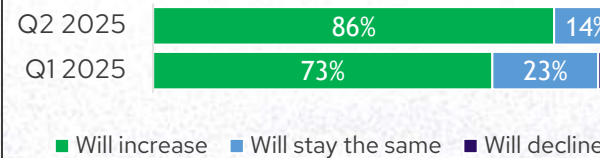
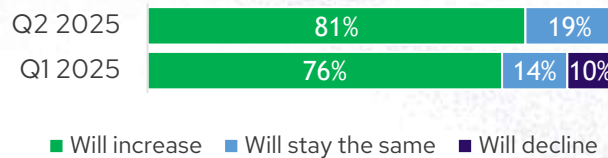


Preferred payment method:

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



Investment outlook:



* One-time fee for indefinite access to software or services

Q. How does your organization prefer to pay for the following products/services? Q. What is your outlook for your organization's different types of technology revenues over the next year? (Media/production companies, technology investment decision-makers and influencers)

Source: IABM MediaTech Industry Tracker

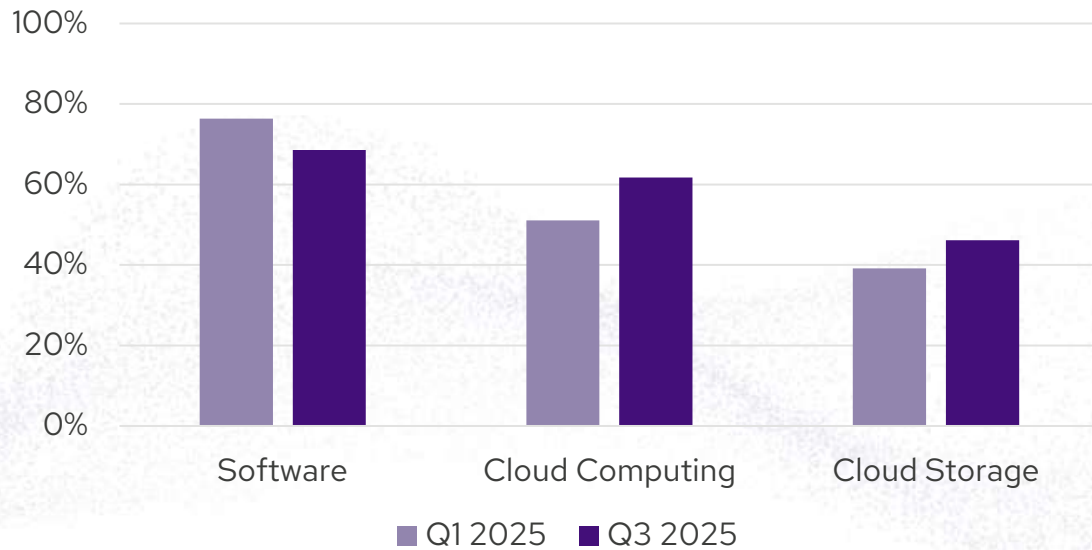
MediaTech Investment

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



Supplier revenue outlook

NET outlook (will increase minus will decline)

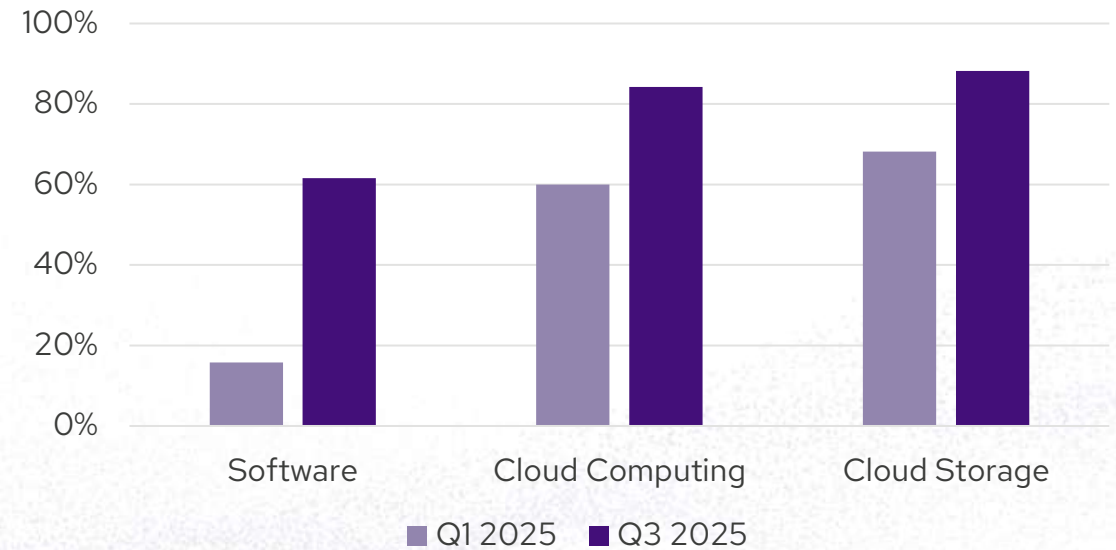


Q. What is your outlook for your organization's different types of technology revenues over the next year? (media technology vendors, sample size - from 23 to 72)



End user investment outlook

NET outlook (will increase minus will decline)



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 17 to 38)

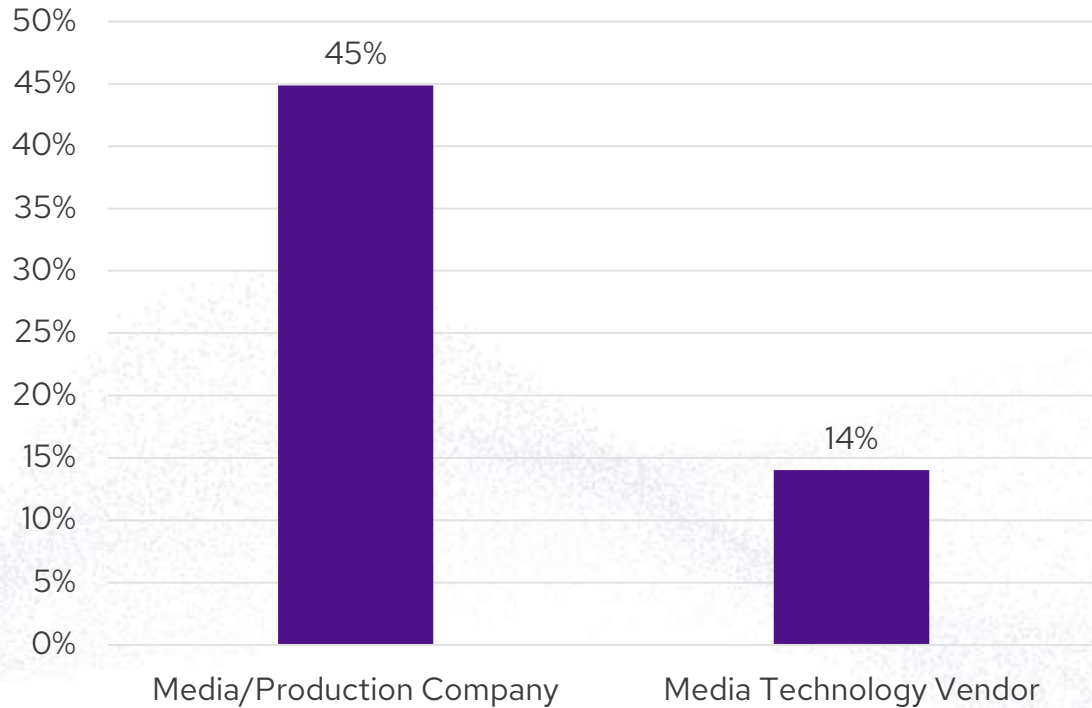
Source: IABM MediaTech Industry Tracker

MediaTech Investment

Media companies prioritize cloud storage, contrasting with media tech vendors

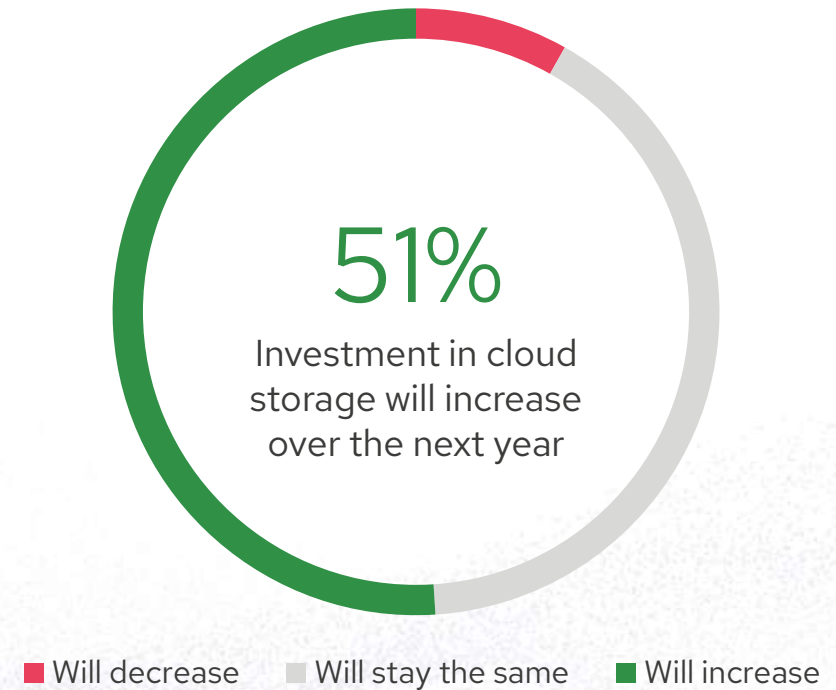


Cloud storage in technology roadmaps



Q. What are the most important trends in your organization's technology roadmap? (Q1 2025 n=150, Q3 2025 n=150)

Cloud storage investment outlook



Q. What is your outlook for your organization's different types of technology revenues over the next year? (Media/production companies, technology investment decision-makers and influencers)

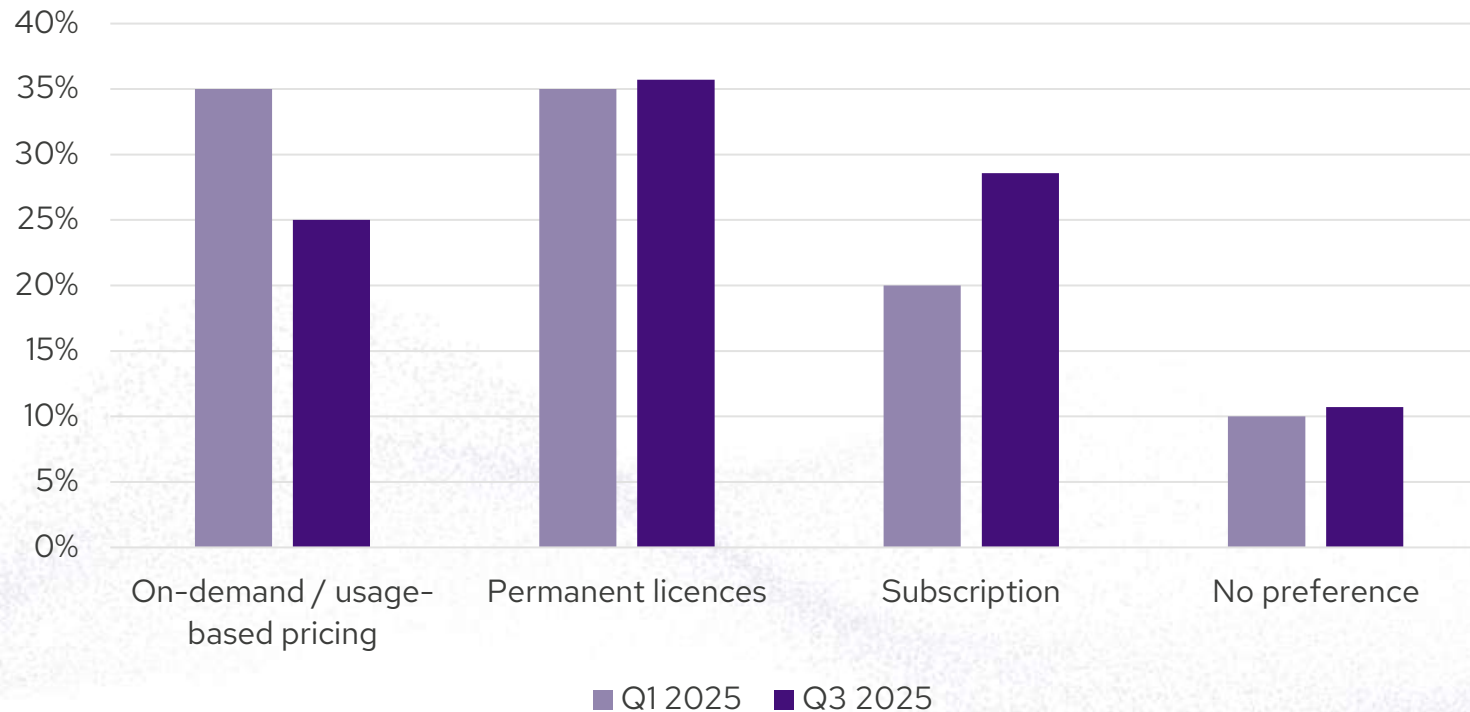
Source: IABM MediaTech Industry Tracker

MediaTech Investment

Payment preference for software is shifting from usage-based to subscriptions



Preferred payment method for software



Q. How does your organization prefer to pay for the following products/services? (media/production companies, Q1 2025 n=40, Q3 2025 n=28)

Subscription-based pricing

Payment preference for software shifts from usage-based pricing to subscription-based models.

Source: IABM MediaTech Industry Tracker



Investment in security is growing

IABM data shows the growing importance of security (including cyber, encryption, conditional access) in broadcast and media industry's technology roadmaps. Security has risen by 5% points year-over-over in 2025 and became the second fastest-growing trend, following AI & ML.

Drivers of change



Transition to OTT and streaming



Transition to software-based workflows

Strategies to address cyber threats



Strengthening perimeter (Zero Trust architecture)



Training employees



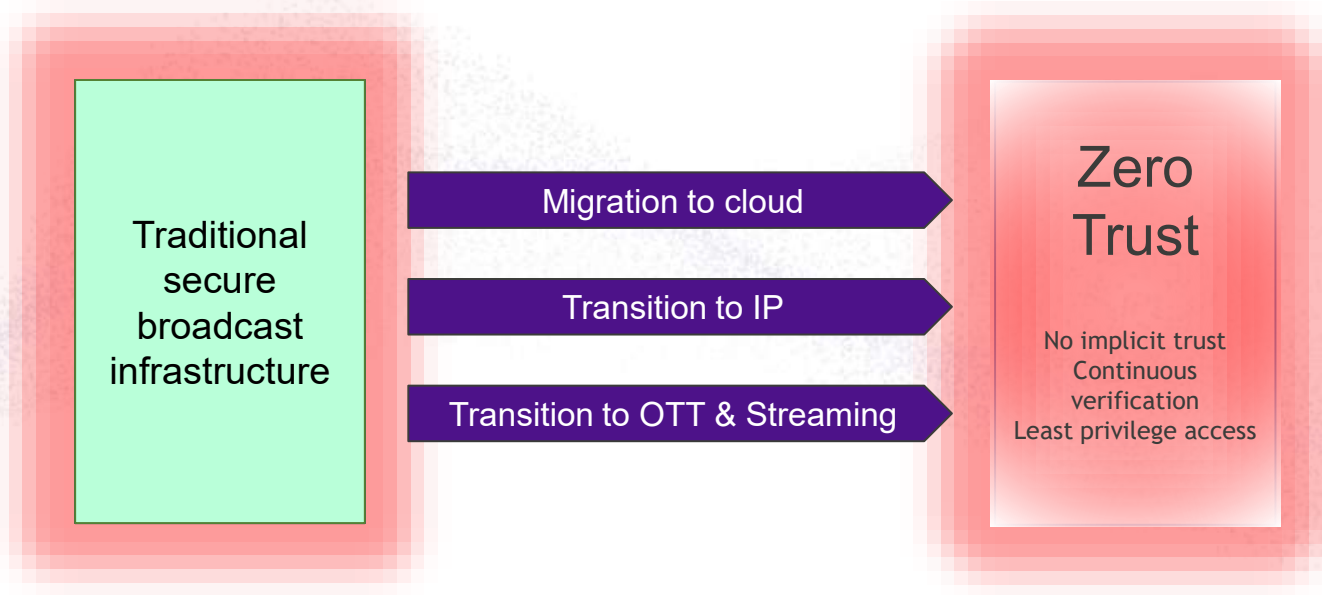
Fostering collaboration

Source: Security in MediaTech Ecosystems Megatrend Report

MediaTech Investment

Securing Infrastructure: Zero-trust security model

Due to digital transformation in the broadcast and media industry, the traditional security framework, which treats everything outside the facility and any outside actors gaining access to the network as a threat, has evolved into the zero-trust security model. This implies that everything inside or outside of the network is a potential threat, including human errors, misconfigurations of cloud environments, internal and external malicious actors, etc.



MediaTech Supplier in an IABM interview

In the past, when distribution of content was within a facility or within a secure environment, there was an implied assumption that you're within a secure environment. Your networks are secure. Your machines are secure. The people in it are trusted, so you have to only focus on how to encrypt the content on one end and take it out on the other end. Now, with these very complex workflows that go from facility to facility, often bouncing over cloud, and in a B2B model from the cloud to many end users, the assumption that you're in a secure environment goes away.

Sergio Ammirata
Chief Scientist
Sip Radius
(June 2025)



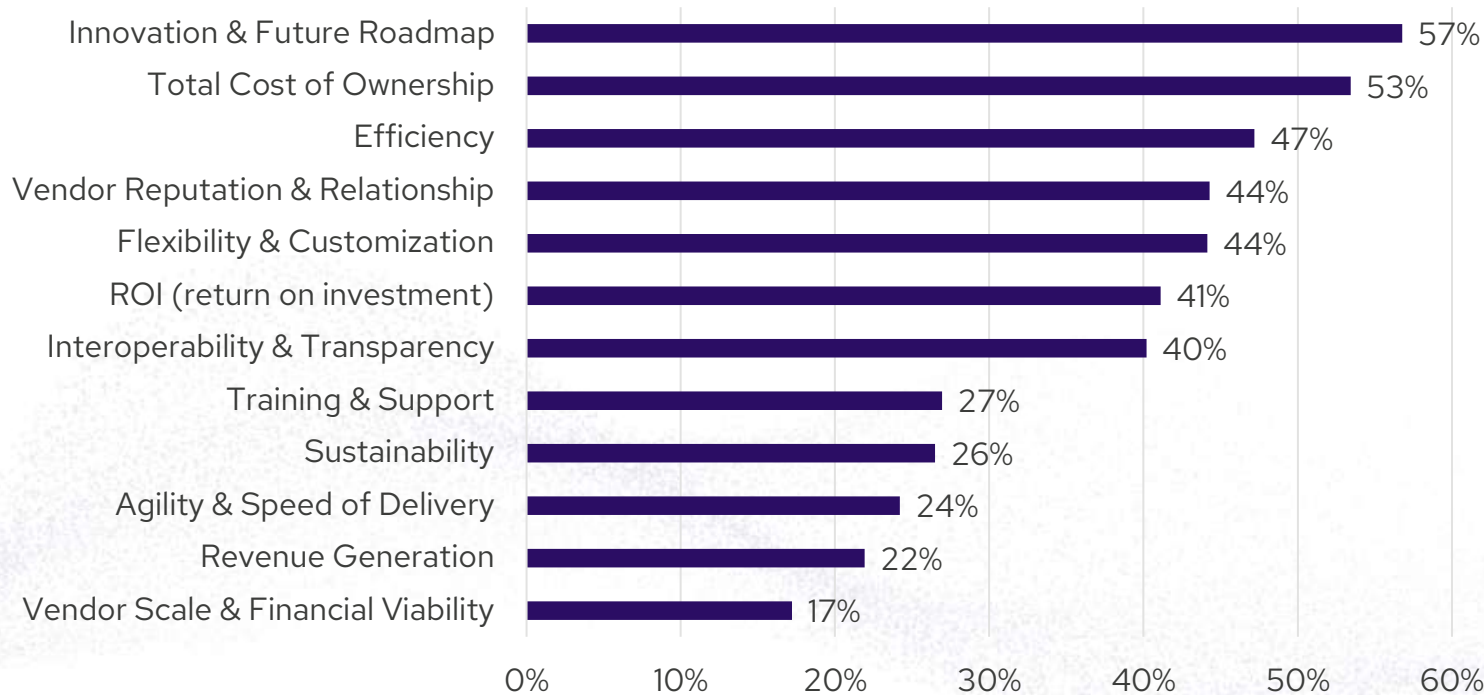
Source: Security in MediaTech Ecosystems Megatrend Report

MediaTech Investment

Innovation, total cost of ownership and efficiency keep driving investment decisions



Technology Purchasing Factors



Purchasing factors

Innovation & Future potential and TCO remain key factors driving media technology purchasing decisions.

Focus shifts toward efficiency and interoperability in Q3 2025. Efficiency becomes the main investment driver.

The importance of ROI continues growing.

Purchasing decisions are increasingly driven by sustainability.

Q. In general, besides cost and technical specification, what are the most important factors that influence your decision to purchase media technology products and services? (media technology buyers, 2025 n=88)

Source: IABM MediaTech Industry Tracker

Setting Boundaries on Gen AI Usage

Throughout 2025 leading broadcasters and streamers have published guidelines, manifestos and statements of ethics detailing their stance on generative AI, and practical instructions to suppliers on permitted use, and best practice.

In August 2025, Netflix published a set of production guidelines on its Partner Help Centre that sets out five guiding principles and details expectations for how generative AI can be applied in regard to data use, creative output, talent & performance, and ethics & representation

Due to Netflix's prominent position in the global streaming market, the guidelines are expected to be highly influential not only on direct suppliers but also on the wider production ecosystem as media owners look to ensure that their content library remains compliant for resale. The Netflix Post Technology Alliance initiated in 2018 created such an effect when the streamer set out requirements for cameras, editorial, colour grading and IMF encoding.

Source: IABM, Netflix

Media Streamer Statement on Gen AI for Content Production

We expect all production partners to share any intended use of gen AI with their Netflix contact, especially as new tools continue to emerge with different capabilities and risks.

Most low-risk use cases that follow the guiding principles below are unlikely to require legal review. However, if the output includes final deliverables, talent likeness, personal data, or third-party IP, written approval will be required before you proceed.

Netflix
Gen AI For Content Production Guidelines
(August 2025)



MediaTech Investment

Generative AI model attribution vital to avoid copyright infringement



As existing tools in the video content supply chain integrate 1st party and 3rd party features that leverage generative AI, transparency with attribution and terms of use are paramount. To avoid alienating a customer base of creatives and artists, Adobe has assured users that it does not use assets created in its suite of apps to train its own generative AI models. Adobe highlights that licensed and copyright free assets have been used to train its own 1st party generative AI models to assure users that they will be safe for commercial use without infringing others' copyright. However, users have also requested the integration of Adobe applications with third party generative AI models to streamline their workflows. Adobe has issued commitments to customers that they will not train Firefly Gen AI models on customer content and will never assume ownership of work created in their applications and services. Therefore 3rd parties have had to agree to Adobe's terms when integrating their models for native use within the Adobe ecosystem, this can provide additional assurance to creators that want to utilise generative AI whilst retaining ownership of their intellectual property.

3 rd Party Model Integrations with Adobe	Firefly Boards	Firefly Boards Video Model	Text to Image	Text to Video	Image to Video
Veo by Google	✓			✓	✓
Imagen by Google	✓		✓		
GPT image generation model by OpenAI	✓		✓		
Flux 1.1 and Flux.1 Kontext by Blackforest Labs	✓		✓		
Pika video generator by Pika Labs		✓			
Ideogram by Ideogram	✓				
Luma Ray2 by Luma		✓			
Runway Gen-4 by Runway	✓				

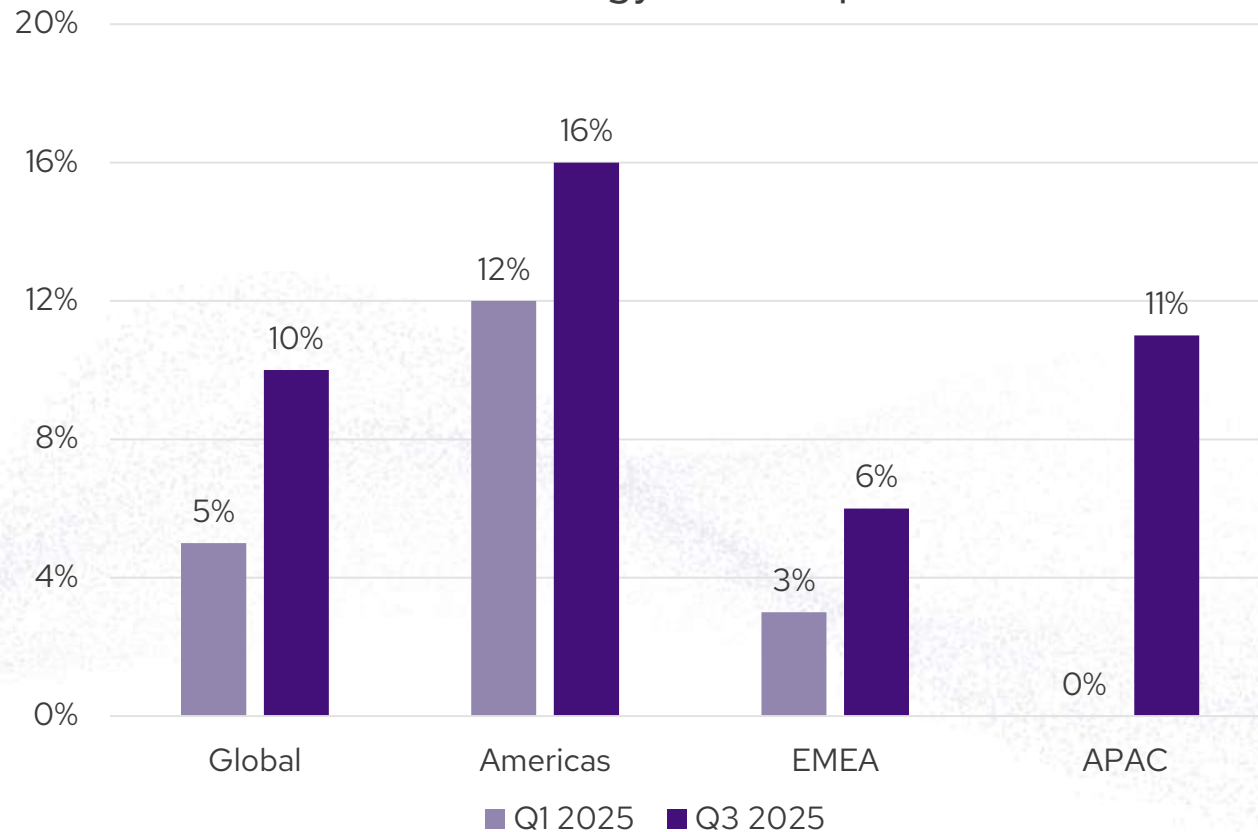
Source: Adobe

MediaTech Investment

Content authenticity is gaining traction worldwide



Provenance & Authenticity in organizations' technology roadmaps



Source: IABM

Survey Update

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

Combating Misinformation

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

MediaTech Investment

Content Credentials can now be created at the point of video acquisition



Consumer Electronics



Samsung Electronics announced native support for C2PA compliant Content Credentials in the new S25 smartphone range at the brand's Unpacked event in February 2025. Metadata labels will be tagged to AI-generated and AI-altered images produced on the handsets. The brand's endorsement for Content Credentials is significant in developing an installed base of compatible consumer electronics and driving consumer awareness as currently the largest manufacturer of smartphones worldwide. IDC attributed the brand with the leading market share of global smartphone volume (19.7%) in Q2 2025.

Professional B2B Products



Sony's new flagship XDCam, PXW-Z300, aimed at electronic news gathering is the first professional video camera that can embed digital signatures into recorded video. Announced in July 2025, the camera will provide a platform for Sony to introduce C2PA compliant video authentication technology to professional video production at the point of acquisition. The feature will allow broadcasters and news organizations to provide a guarantee of authenticity of the origin of their video footage to their audiences. However, the feature may not be available immediately at the time of the product's launch or in all countries and regions.

Source: Samsung, Sony

MediaTech supplier statement on product announcement

It's getting tougher and tougher to tell what's real from what's fake online. People are genuinely starting to wonder if they can trust what they see. That's why it's more important than ever for news and media organisations to deliver authentic, trustworthy content – their reputation really depends on it.

Hitomi Hamaba
Head of Product & Marketing Lead at Sony
(July 2025)



Provenance at the edge

In August 2025, Fastly enhanced its Image Optimizer with native C2PA support, shifting from a performance-focused approach that stripped metadata to one that embeds provenance, ensuring both optimized delivery and content authenticity.

By integrating C2PA signing at the edge delivery layer, Fastly ensures provenance is added without slowing down performance, setting a precedent for other infrastructure providers.

This move is part of a broader industry trend of building infrastructure that ensures audience trust, as generative AI makes identifying manipulated or synthetic content increasingly difficult. C2PA standards are now being extended beyond images to video delivery, including both on-demand and live streaming contexts. This enables real-time authentication for broadcast news, entertainment, and social media platforms.

MediaTech supplier statement on product update announcement

Our C2PA integration represents more than just a feature addition—it's part of a broader commitment to building infrastructure that supports a more trustworthy internet. By implementing C2PA at the edge, we're helping to normalize content provenance as a standard part of media delivery.

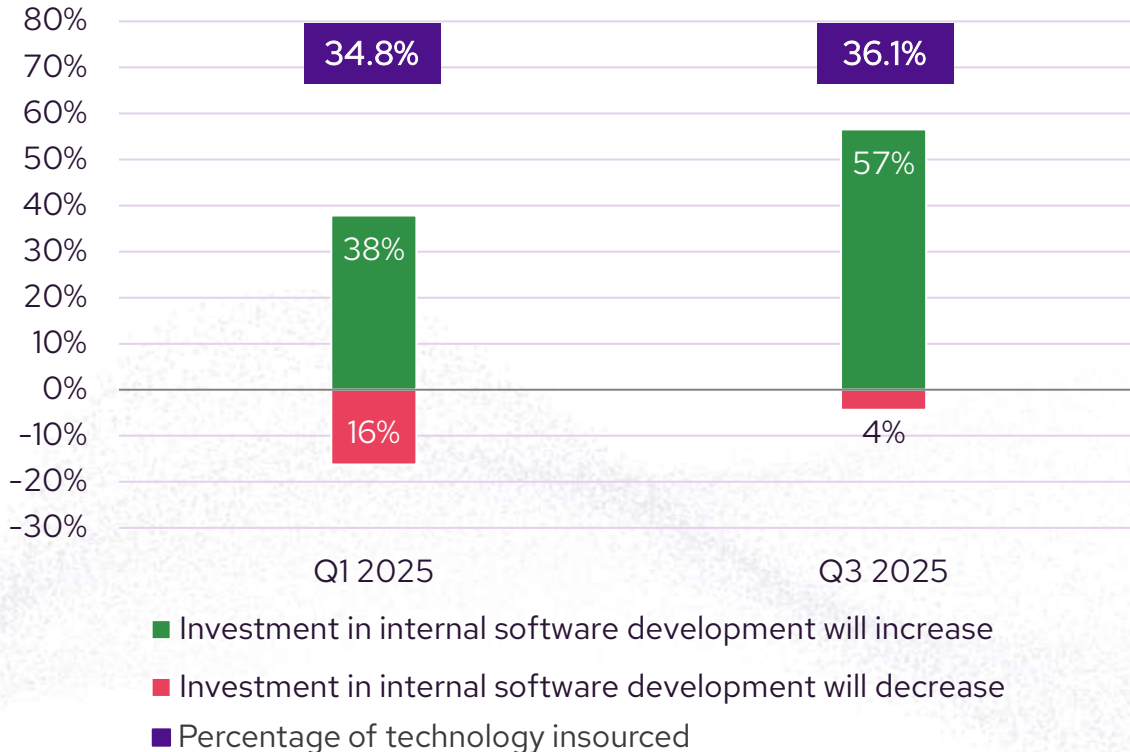
James Sherry, Staff Product Manager at Fastly
(August 2025)



MediaTech Investment

Insourcing is expected to accelerate in the year ahead

Insourcing outlook



Q. How will your investment in internal software development change over the next year?
(media/production companies, Q1 2025 n=37, Q3 2025 n=23)

Source: IABM MediaTech Industry Tracker



Premier League

The Premier League will bring all international content production and distribution in-house starting from the 2026-2027 season, ending a 20-year partnership with IMG.

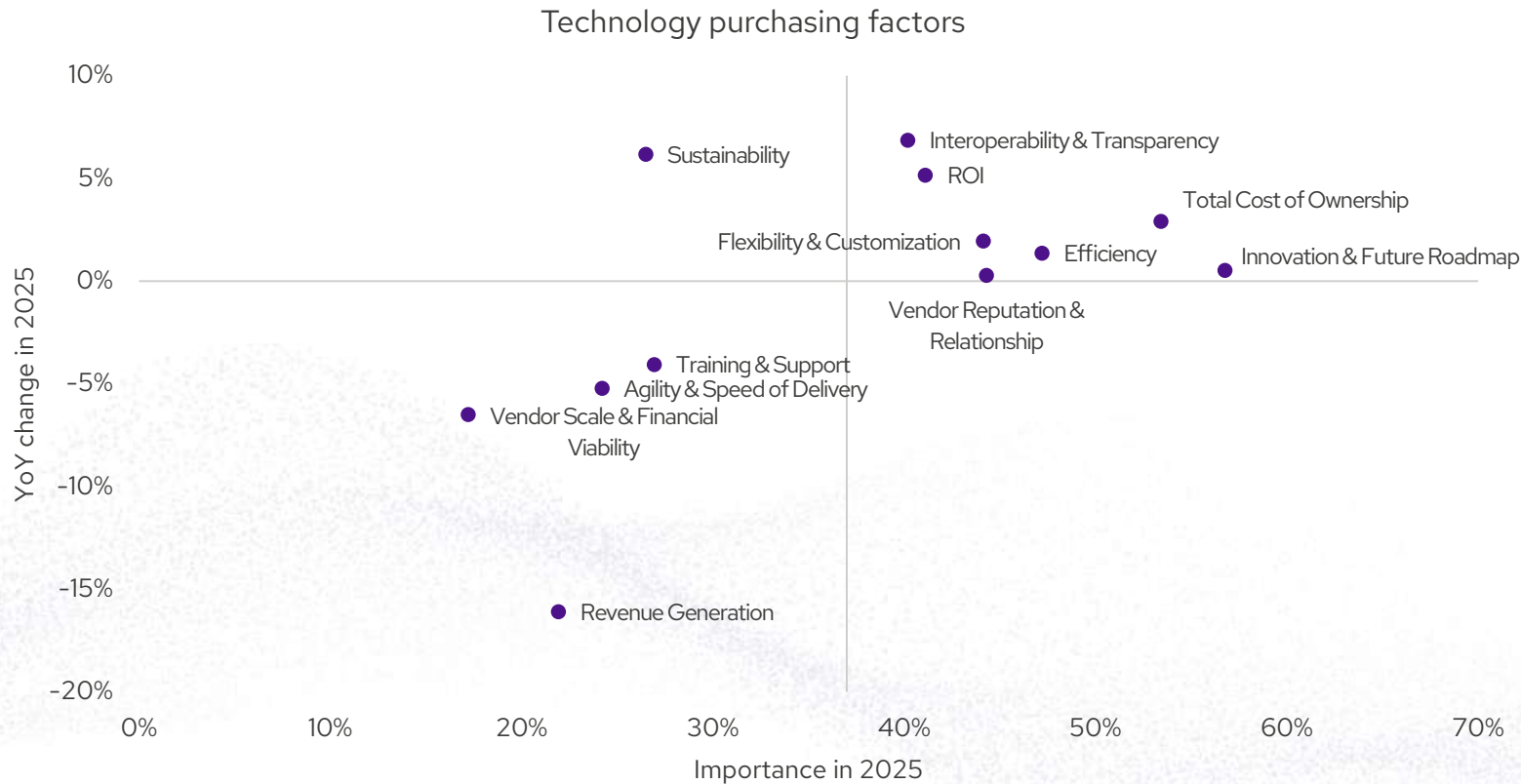


Netflix

Netflix has developed its proprietary first-party ad tech platform Netflix Ads Suite, which provides Netflix greater control over its advertising ecosystem. Initially launched in April 2025 in North America, the platform has been rolled out to all Netflix's ad markets by July 2025.

MediaTech Investment

MediaTech purchasing decisions are increasingly driven by interoperability



Purchasing factors

Interoperability, ROI, and sustainability are gaining importance as media technology purchasing factors

Q. In general, besides cost and technical specification, what are the most important factors that influence your decision to purchase media technology products and services? (media technology buyers, n=88)

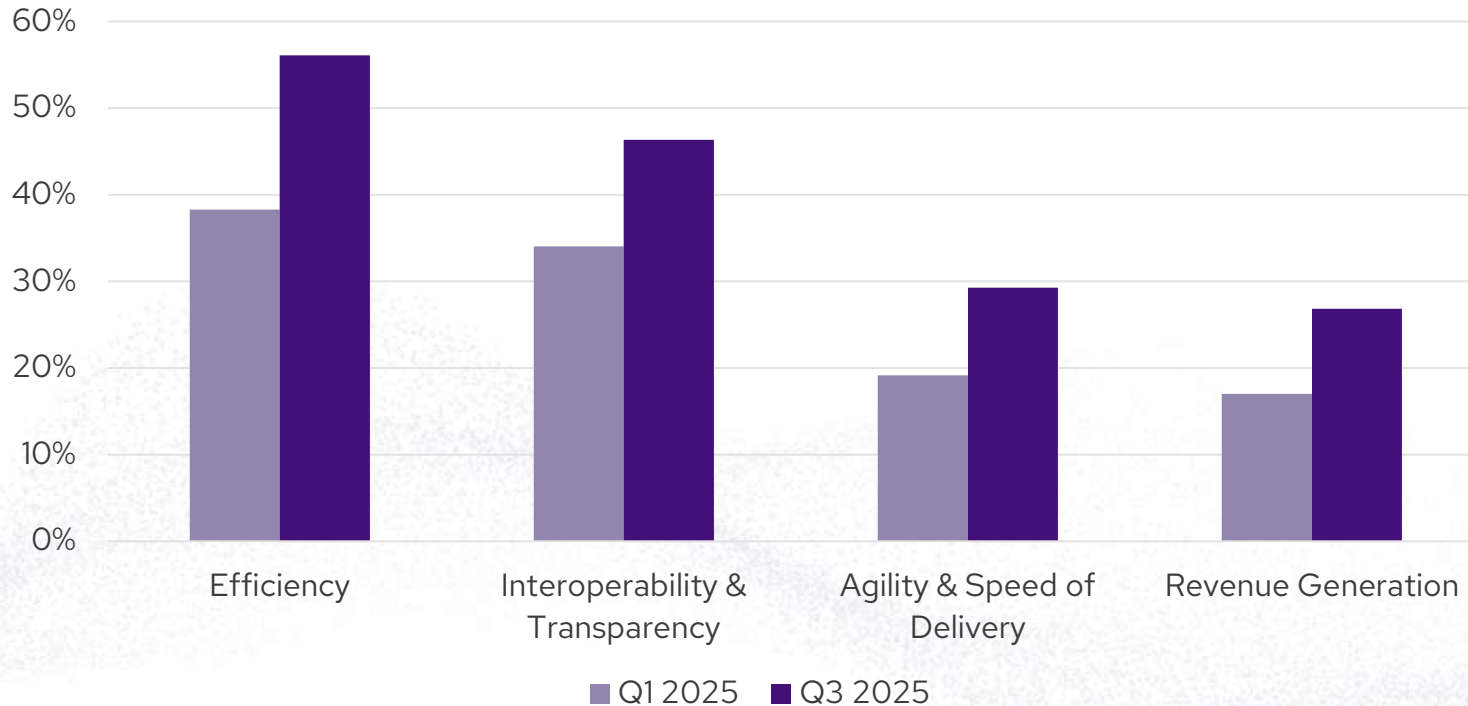
Source: IABM MediaTech Industry Tracker

MediaTech Investment

Innovation, total cost of ownership and efficiency keep driving investment decisions



Technology Purchasing Factors



Q. In general, besides cost and technical specification, what are the most important factors that influence your decision to purchase media technology products and services? (media technology buyers, Q1 n=47, Q3 2025 n=41)

Source: IABM MediaTech Industry Tracker

Purchasing factors

Focus shifts toward efficiency and interoperability in Q3 2025. Efficiency becomes the main investment driver.

The importance of ROI continues growing.

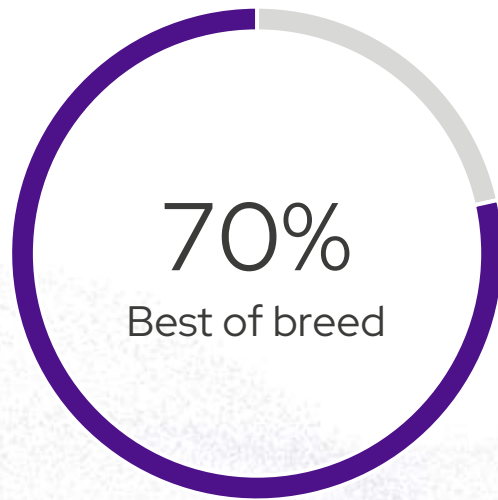
Purchasing decisions are increasingly driven by sustainability.

MediaTech Investment

Interoperability becomes increasingly important for media tech investment



Purchasing preference, 2025



- To purchase a complete system from an end-to-end solution provider that provides most or all the products we need
- To evaluate multiple suppliers and create "best of breed" solution

Q. When purchasing media technology products, which do you generally prefer?
(media technology buyers, n=88)

In June 2025, Sinclair and its subsidiary ONE Media Technologies in partnership with Pearl.TV hosted an end-to-end interoperability event bringing together over 30 manufacturers, developers, and vendors from across the broadcast technology sector, at Sinclair's headquarters in Hunt Valley, Maryland. The event focused on testing interoperability for devices and systems intended for NextGen TV (ATSC 3.0) and included more than 100 scheduled tests examining key features such as digital rights management (DRM), dynamic ad insertion, enhanced audio/video, failover recovery, and the Broadcast-Enabled Streaming Television channel. This industry-wide collaboration represents a critical milestone in advancing the ATSC 3.0 rollout in the US, with major broadcast markets expected to complete the transition by February 2028 and remaining markets following by February 2030.

The most common interoperability issues identified include device compatibility, standards conformance, signal transport, and digital rights management (DRM) challenges.

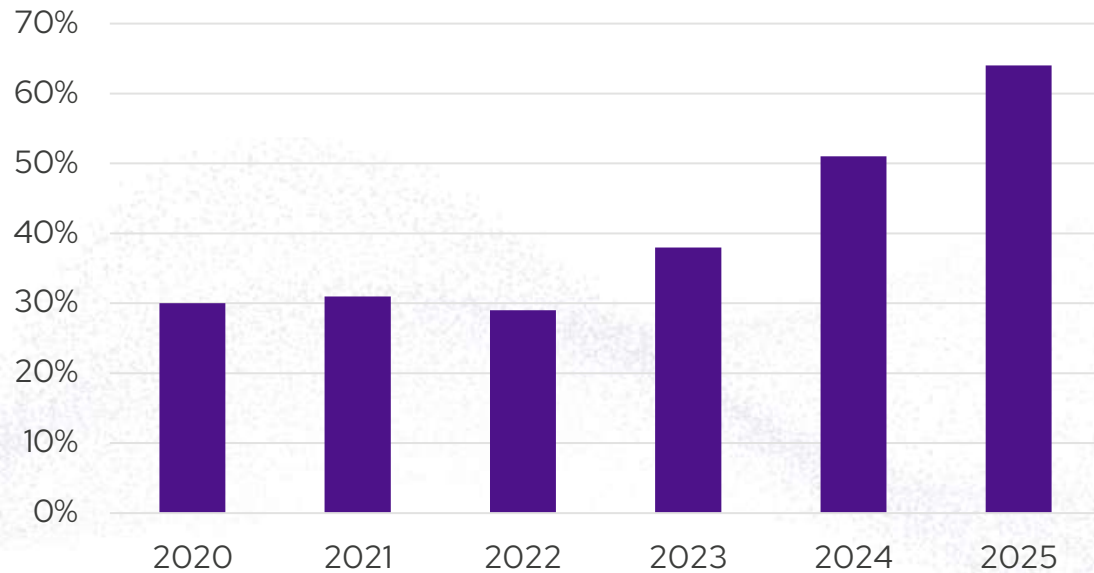
Source: IABM MediaTech Industry Tracker, Sinclair

MediaTech Investment

AI surge is driving increased focus on sustainability in media tech purchasing

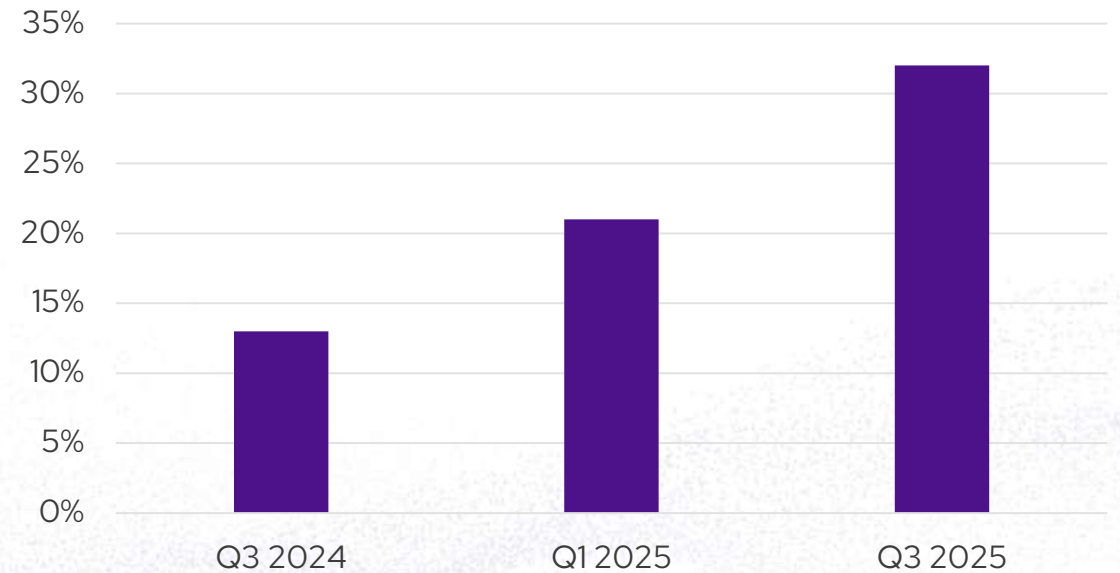


AI in media companies' technology roadmaps



Q. What are the most important trends in your organization's technology roadmap? (media technology buyers, sample size = 48 to 113 per year)

Sustainability as media technology purchasing factor



Q. In general, besides cost and technical specification, what are the most important factors that influence your decision to purchase media technology products and services? (media technology buyers, sample size = 24 to 47 per wave)

Source: IABM MediaTech Industry Tracker

MediaTech Business Models

Key drivers of change in 2025 and beyond

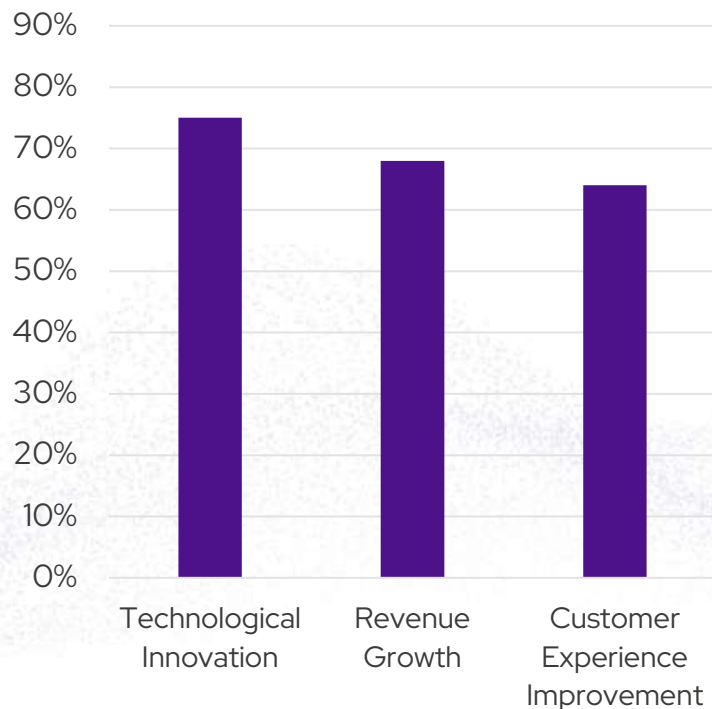
18 April 2026

MediaTech Business Models

Technology Innovation is Driving Business Transformation

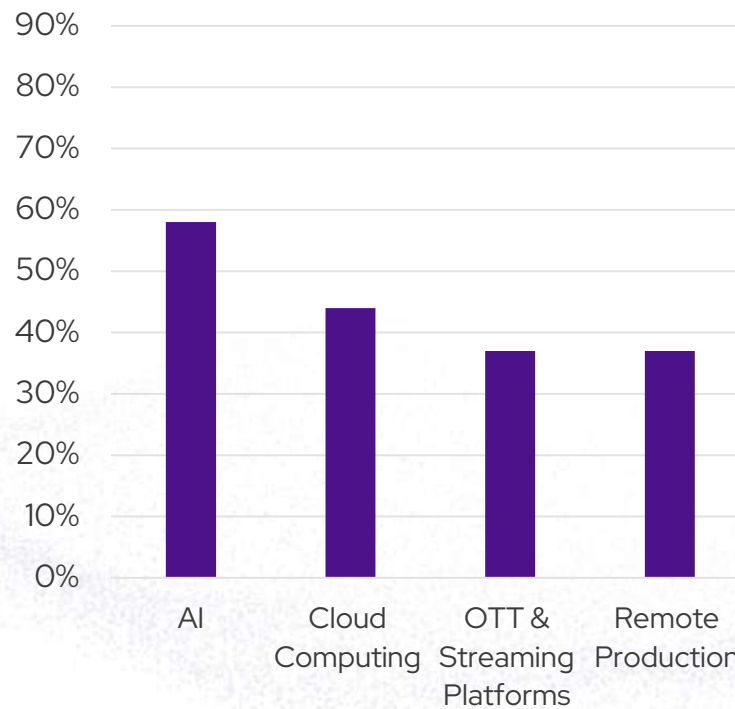


Key Drivers of Business Transformation (Top 3)



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

Critical Transformation Technologies (Top 3)



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



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

Business Transformation

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

Survey Methodology

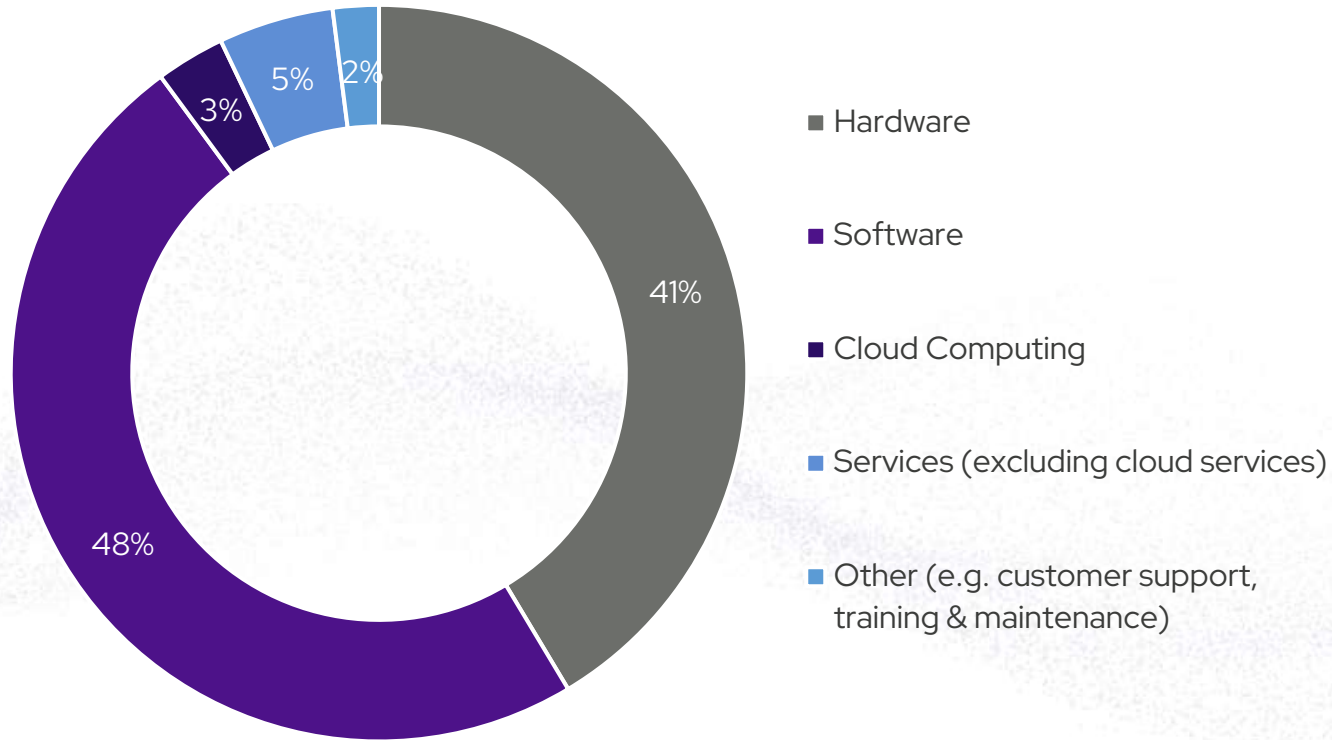
IABM's Business Intelligence Unit conducted a short survey targeting senior leaders in MediaTech organizations that are either leading (66%) or involved in (34%) the operational strategy and decision making for their organization.

Source: IABM Business Transformation Megatrend Report

MediaTech Business Models

Opportunity for software catalysed by Media eXchange Layer initiative

Supply-side primary revenue sources 2025



Innovation in Software-Defined Applications for Media Production

The launch of the Media eXchange Layer initiative is expected to catalyze the introduction of a new generation of interoperable and open-source software for media production that can be hosted on generic IT compute resources, in the cloud or on-premise (as per the Dynamic Media Facility reference architecture).

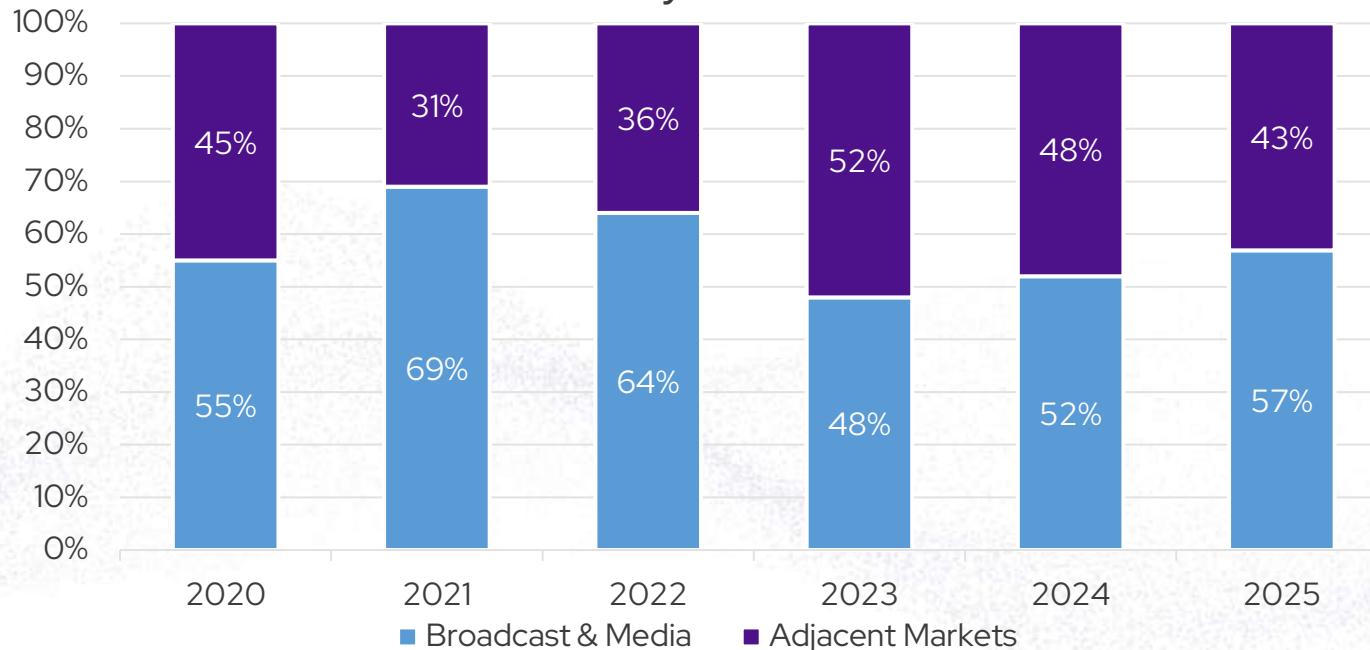
Source: IABM MediaTech Industry Tracker

MediaTech Business Models

Broadcast & media business improves while parallel markets remain important



Average % share of MediaTech supplier revenues by source



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

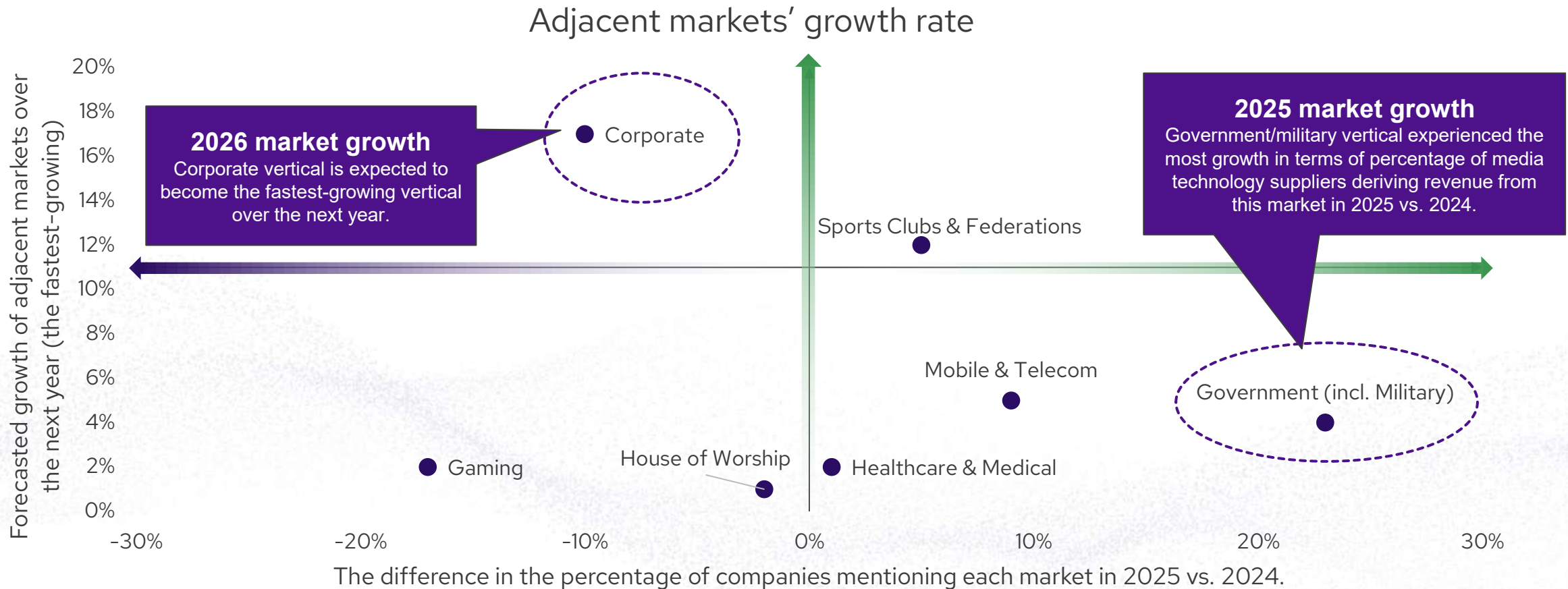
Parallel Markets
Parallel markets, such as corporate, government, and education represent new revenue generation opportunities, while the increase in share of broadcast & media revenue share reflects improving market health.

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

Source: IABM MediaTech Industry Tracker

Corporate is projected to outpace other verticals

Government/military received the biggest increase in mentions YoY



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

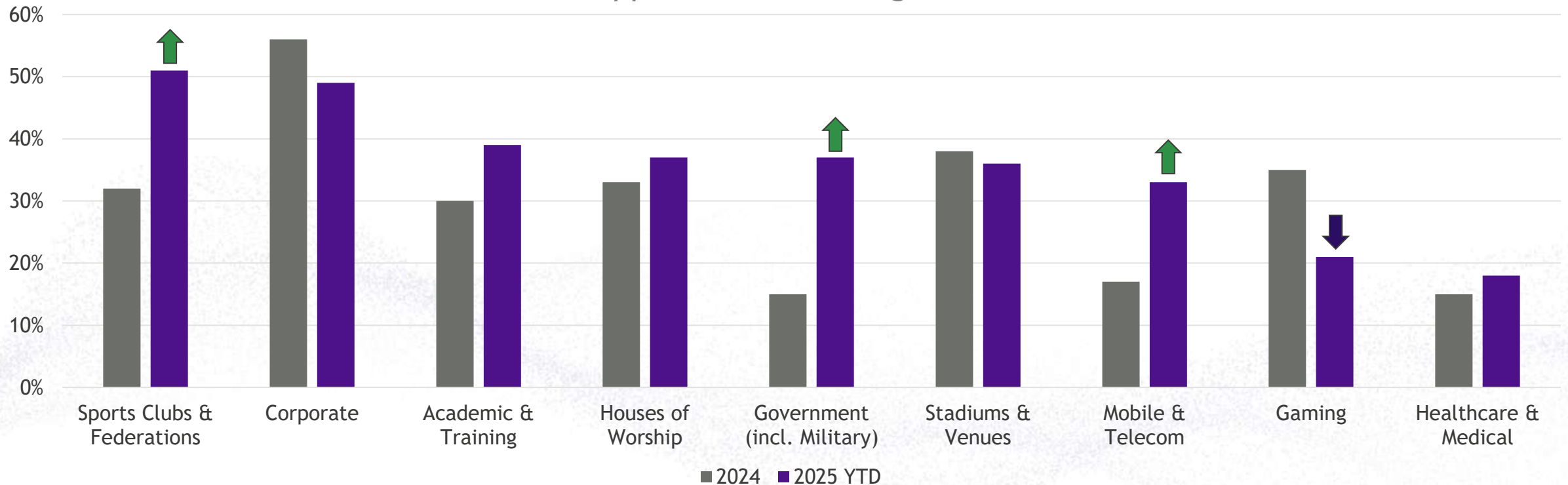
Source: IABM, MediaTech Industry Tracker Survey

MediaTech Convergence

Sports clubs & federations rise to become the most widely served segment



Suppliers' revenue segments

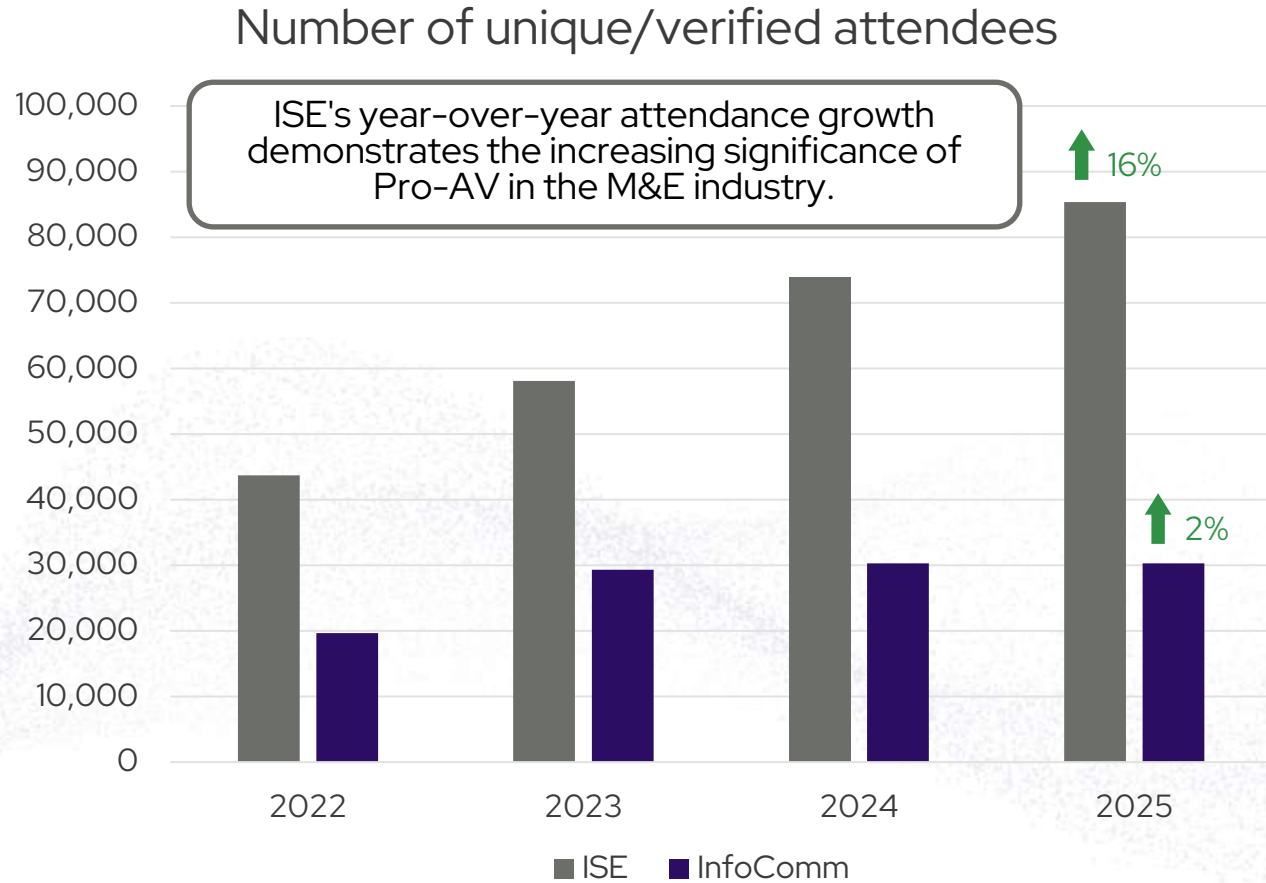


Q. What are your organization's revenue segments? (2024 n=81, 2025 n=67)

Source: IABM MediaTech Industry Tracker

MediaTech Business Models

InfoComm did not reach ISE's rate of annual growth



Industry Convergence

Leading trade events that have served the Pro AV market are providing a site for partnerships and business development as broadcast, professional AV, and IT technologies converge.

Modest Growth at InfoComm

InfoComm was not able to achieve the rate of growth registered by Integrated Systems Europe earlier in the year. A variety of factors contributed to this, however, as a US based show, attendance at InfoComm from international visitors and exhibitors was detrimentally impacted by the uncertainty surrounding international trade with the US.

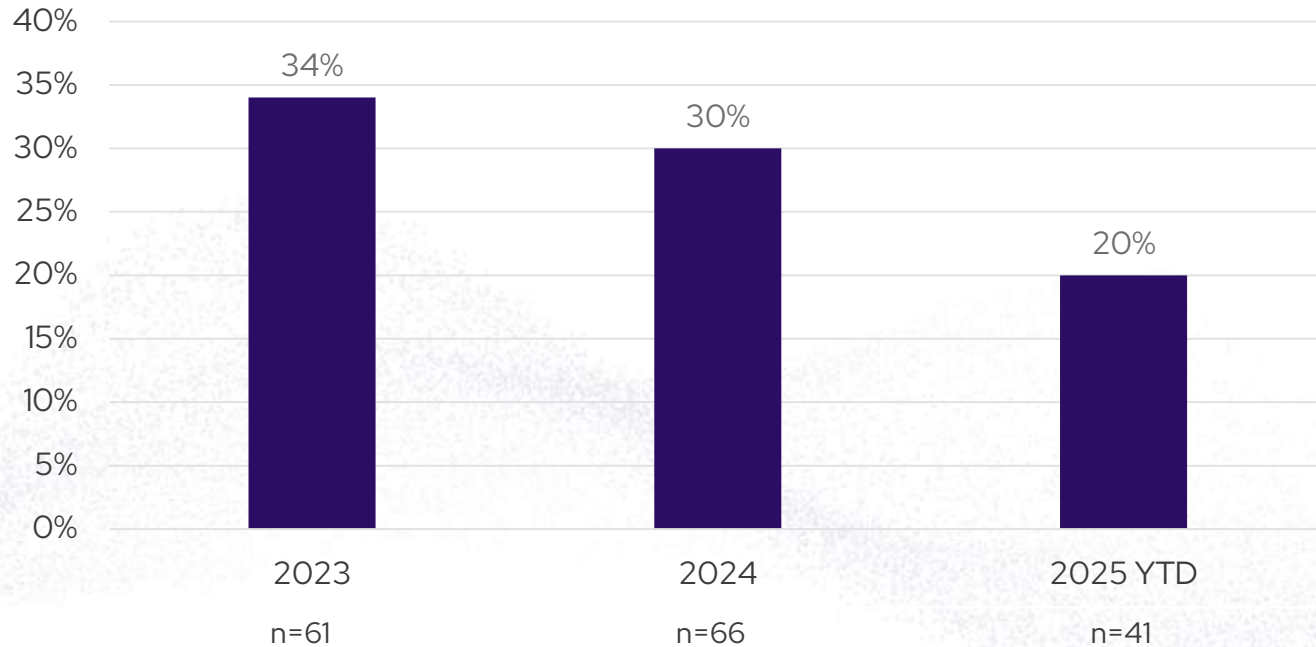
Source: IABM, ISE, AVIXA

MediaTech Resilience

Importance of sustainability as an investment driver continues to decline YoY



Importance of Sustainability as an investment driver



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

Source: IABM MediaTech Industry Tracker

Sustainability

According to IABM’s latest survey data, sustainability is prioritized as a driver of investment by a falling number of companies even though its importance has notably increased in Q3 2025.

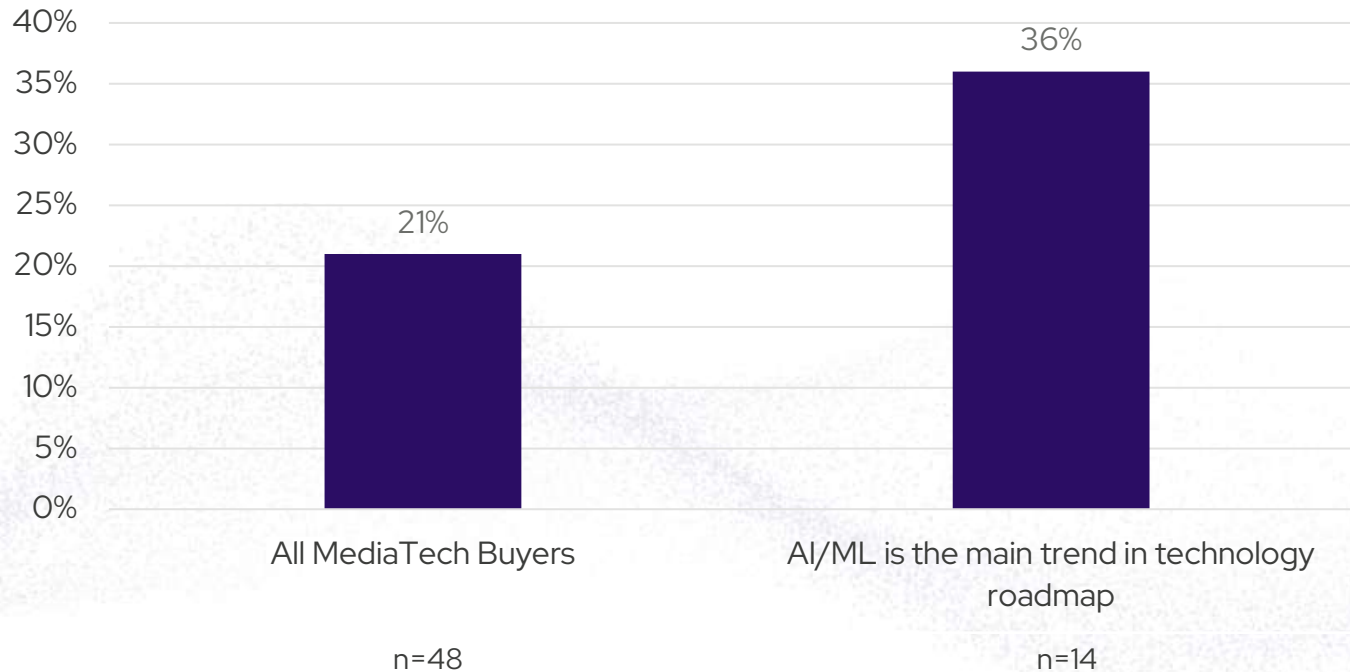
Technology end-users are prioritizing Total Cost of Ownership (TCO) and efficiency over sustainability when investing in new technology and tend to consider sustainability as a “nice to have” by-product of efficiency, as the benefits associated with environmental sustainability are well aligned with their financials.

MediaTech Resilience

Companies focusing on AI tend to prioritize sustainability in buying decisions



Importance of Sustainability as an investment driver
(2025 YTD)



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

Source: IABM MediaTech Industry Tracker

Sustainability

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

The emergence of generative AI over the past year has enabled media businesses to automate more workflows and improve their energy efficiency. Simultaneously, they are more aware of the rapidly rising computing needs required by AI, making end-users more interested in "compensating" their energy demand and carbon footprint by investing in more sustainable solutions.



IABM: State of MediaTech

IABM Business Intelligence Unit

18 April 2026

Introduction

About this report

18 April 2026

IABM Research Streams

The structure of the Business Intelligence Service



State of MediaTech

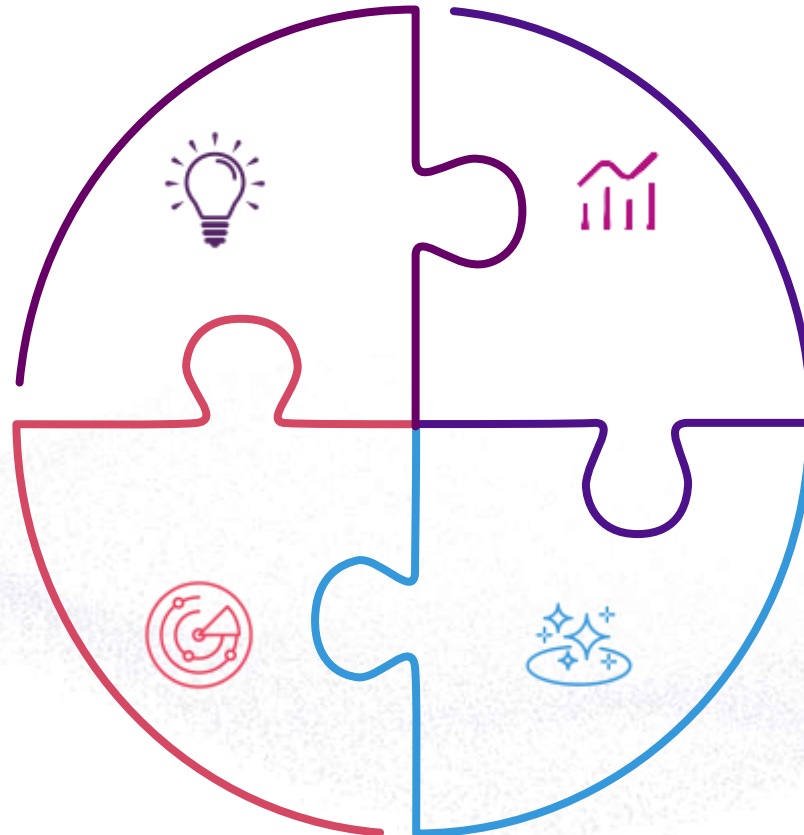
Strategic analysis of MediaTech sector

NAB 2024	IBC 2024
NAB 2025	IBC 2025

MediaTech Radar

Blogs and newsletters focusing on spotlight topics in MediaTech

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



Trackers

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

GeoTracker	TechTracker
ChainTracker	

Megatrends

Analysis of major trends that are fundamentally changing MediaTech

Democratization	Business Transformation
Security	Game Industry Convergence

Note: the dimmed reports are yet to be published

Recently Published Reports

Access IABM research on MediaTech Vantage™



Spotlight topics



State of MediaTech – September 2025

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



Security in MediaTech Ecosystems – August 2025

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



Business Transformation – March 2025

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

Other reports

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

State of MediaTech Report Methodology

This report was prepared using a hybrid research approach



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

Primary Research

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

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

Secondary Research

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

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

About this Report

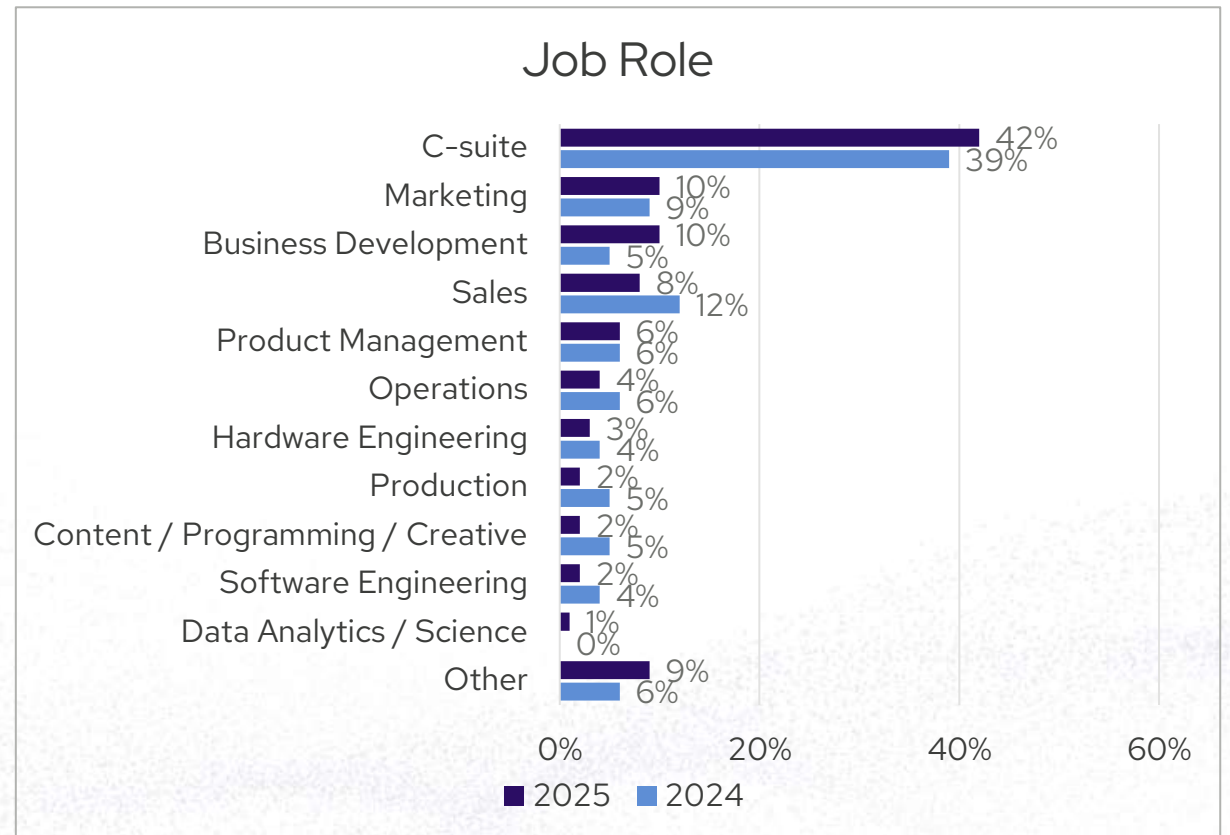
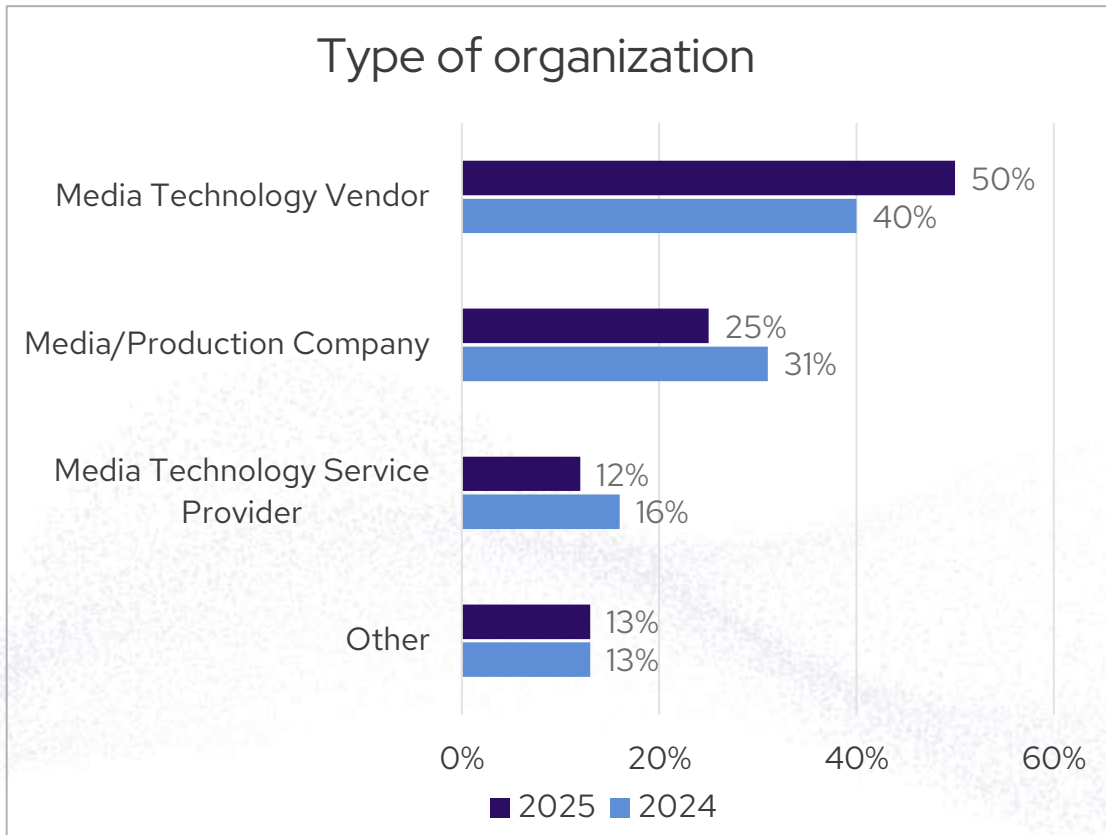
An overview of the contents



- This report is based on exclusive research conducted by IABM before IBC 2025. It aims to provide a strategic analysis of the MediaTech industry with a data-driven focus.
- The main body of this report is divided into three core topical sections:
 - The first section analyses the business environment affecting the MediaTech sector.
 - The second analyses investment and technology adoption trends in MediaTech.
 - The third provides a brief update on key drivers of change in the industry.
- On the following pages, you can find an executive summary of the report highlighting key findings.
- You can find more information on the sources used to produce this report in the Appendix.
- If you have any feedback about this report, or bespoke research enquiries, please contact: insight@theiabm.org.

MediaTech Industry Tracker

Survey includes organizations of all types, with 42% of respondents at C-level



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

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

Source: IABM MediaTech Industry Tracker

MediaTech Industry Tracker

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 Service Providers

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



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.



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.

Executive Summary

Key learnings from the research

18 April 2026

State of MediaTech

Common threads in this research



Profitability

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



Transformation

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



Agility

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

Source: IABM

- Business confidence declined globally in 2025 compared to 2024 as the NET outlook for the overall business environment fell by 10% points to 50%. This marks two years of consecutive decline with an increase in year-on-year decline in 2025 as NET outlook for 2024 dropped by 7% points compared to 2023.
- The strength of positive sentiment has also reduced, as the share of respondents with a very positive outlook has fallen by 11% points from 27% 2024 to 16% in 2025. Those with a quite positive outlook has risen by 3% points from 39% to 42% comparing the same time period. This is indicative of a more tentatively positive or even cautious market outlook. 7% cited the business environment as quite negative. 1% of respondents cited the business environment as very negative in 2025; no respondents have given this answer since 2020.
- Business consolidation and job cuts continue to contribute to falling business confidence. In many cases these operational changes are catalysed by companies enacting strategic business transformations.
- More media organizations are committing to business transformation. Comcast and Warner Bros. Discovery have both announced significant restructures to split out linear TV channels into separate entities to allow them to be operated independently to streaming and studio divisions.
- Despite the fragmentation of audiences across platforms and devices CTV (connected TV) is emerging as a key site for revenue generation. CTV presents advertisers with the opportunity to achieve reach and more granular targeting of advertisements. Media owners can increase their advertising revenues while delivering greater personalization to audiences.

- NET investment outlook has fallen from 34% to 18%. The proportion of media technology buyers that expect their budget to increase over the next year has fallen from 49% to 41% whilst the proportion expecting their budget to decline in the next year rose from 15% to 23%.
- After significant acceleration in the investment in AI and ML in 2024, the technology was cited by an even greater proportion of respondents in 2025, becoming the highest-ranking roadmap item, cited by 64% of the 2025 sample.
- The cloud technology investment categories for 2025 are not directly comparable year-on-year to previous MediaTech Industry Tracker results as the IABM Business Intelligence Unit have made updates in response to IABM member feedback to reflect the need for more granular analysis of cloud deployment. This report contains the first set of full year annual results that separate cloud compute, cloud storage, and virtualization as distinct areas of investment, and question further in relation to the use of private and public cloud, as well as preferred payment models.
- Remote production (44%), OTT & streaming (43%), cloud computing (43%) and IP transport & networking (42%) all occupied a similar level of importance in organizations' technology roadmaps when selecting multiple answers, when asked to choose only their main priority, IP transport & networking (14%) was the second most commonly cited technology as a main priority after AI & ML (29%).

- Media streaming companies are focusing on business transformation to make their services more profitable rather than prioritizing audience growth as the main metric of success. The development of ad-tech, search and discovery, and user experience (UX) are all areas of focus that present opportunities for the application of AI & ML as well as other technologies to provide greater personalization based on individual audience members' unique tastes.
- A number of media organizations including BBC and Netflix have released manifestos and guidelines on the application of generative AI. These initiatives allow organizations to begin using generative AI tools in their workflows whilst protecting themselves from the risk of copyright infringement and guaranteeing the rights of performers and intellectual property of artists and brands.
- To help media organizations and audiences differentiate manipulated or synthetic content from original material, interest in the development of technology to guarantee provenance and authenticity is growing.
- Software provides the greatest proportion of media technology vendors' revenues (48%) on average. After a period of increased investment in migration to cloud workflows, hybrid cloud models have prevailed as the dominant architecture and end-users are continuing to invest in hardware where it can deliver higher performance and/or greater cost efficiency. A new generation of software products are anticipated in the near future as the Media eXchange Layer initiative gains momentum.

State of MediaTech

Key Highlights:



- Technology convergence has led to a diverse range of market verticals using professional audio and video products. In 2025 adjacent market verticals outside of broadcast and media were reported to account for 43% of media technology vendors' revenues on average.
- Following from a decline in technology vendors' average revenue share attributed to the broadcast and media vertical, between 2021 and 2023, broadcast and media business registered a second consecutive year of resurgence in 2025. In 2025 broadcast and media accounted for 57% of vendors' total revenue on average, an increase by 5% points compared to 2024.

Business Environment

Key drivers of change in 2025 and beyond

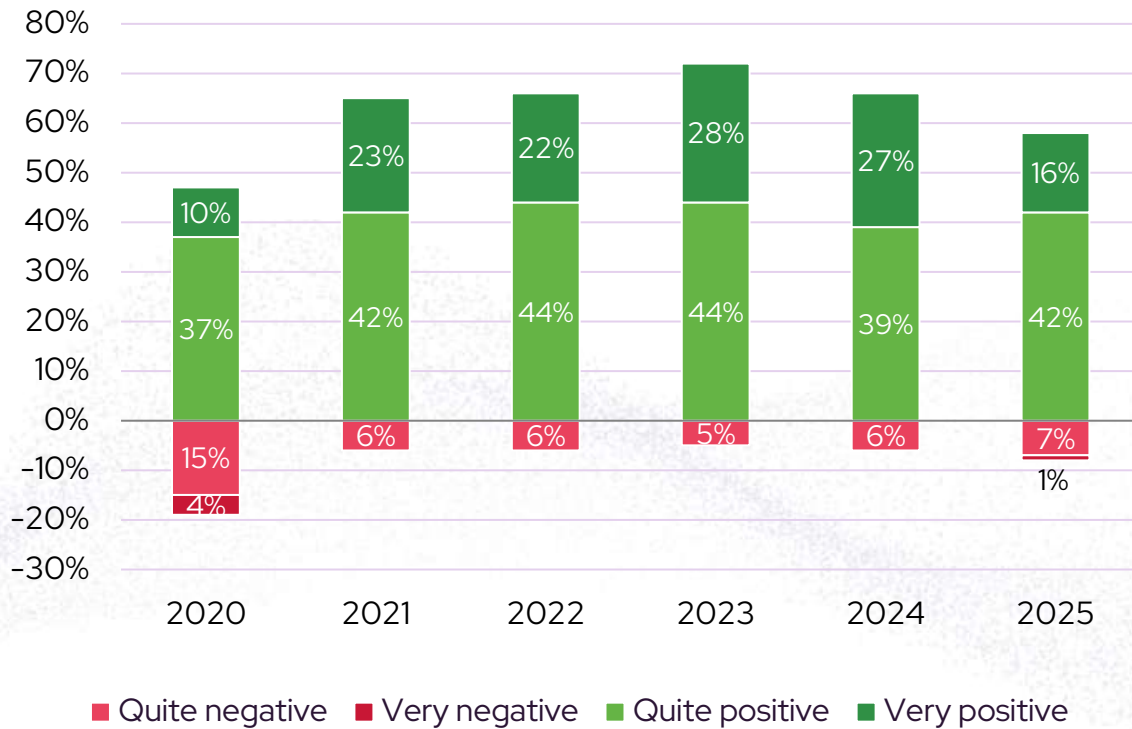
18 April 2026

Business Environment

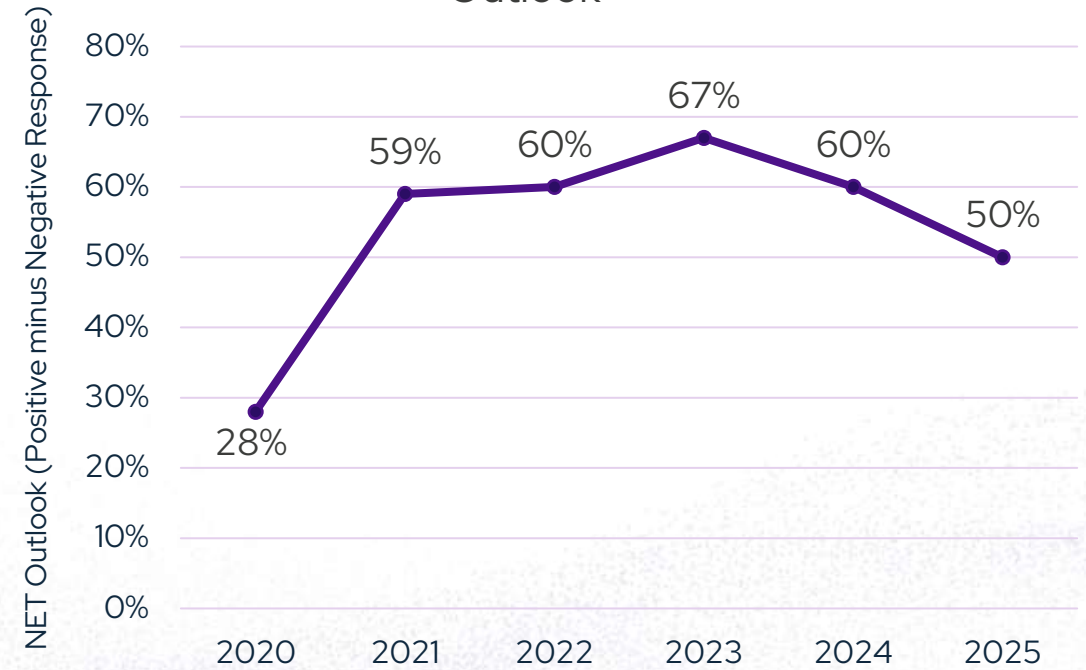
The business environment outlook has slightly worsened compared to last year



MediaTech Business Environment Outlook



MediaTech Business Environment NET Outlook

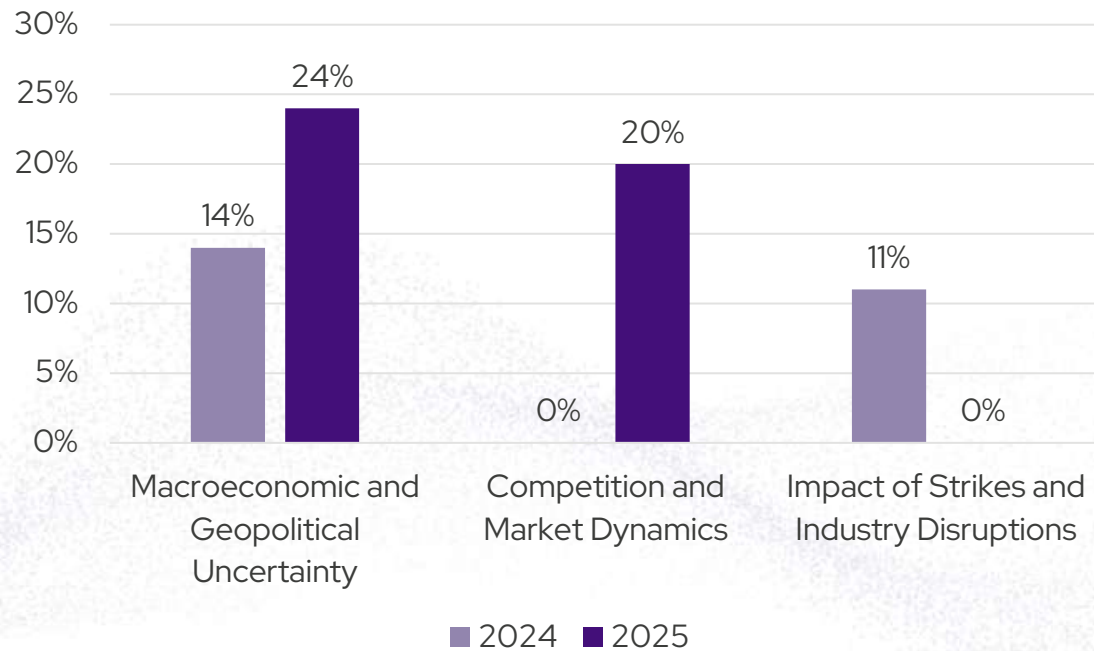


Source: IABM MediaTech Industry Tracker Q. What is your organization's outlook for the overall business environment over the next year? (All Industry)

Business Environment

Uncertainty continues to inhibit decision making

Sentiment Analysis of Additional Comments Made on Business Environment



“Stiff competition (especially globally), tough investments and upgrading period, combined with handling old tech and obsolete buildings/tech. Between a rock and a hard place...”

“The industry seems energized and coming out of the supply issues which created excess inventory that has almost been burned through. Macroeconomics and geopolitics are a big uncertainty for everyone though.”

“There is a great deal of uncertainty due to the political climate, FCC deregulations, and the future of NextGen TV.”

Q. What is your organization’s outlook for the overall business environment over the next year? Based on text analysis of open-ended responses. (All Industry. Sample size 2024 n=36, 2025 n=46)

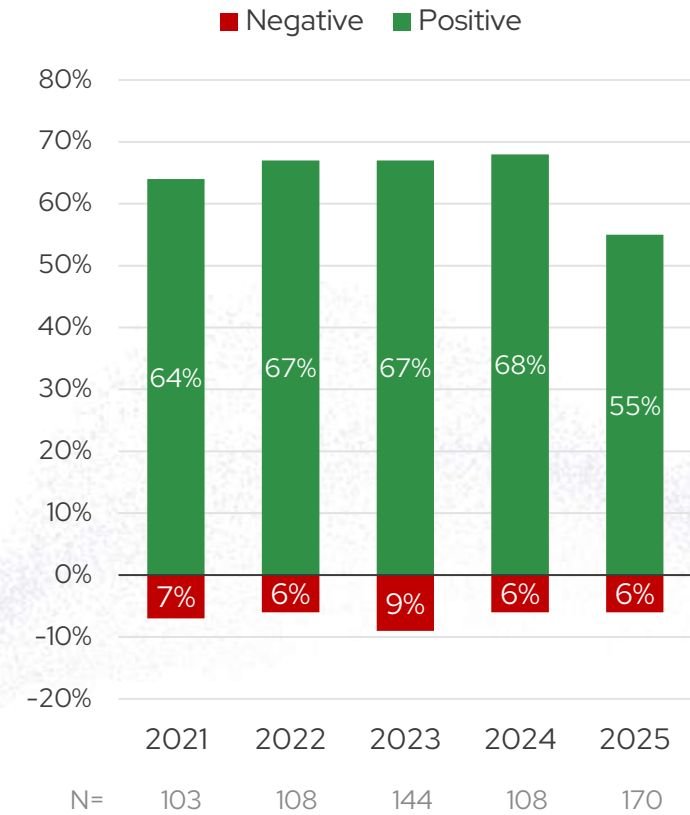
Source: IABM MediaTech Industry Tracker

Business Environment

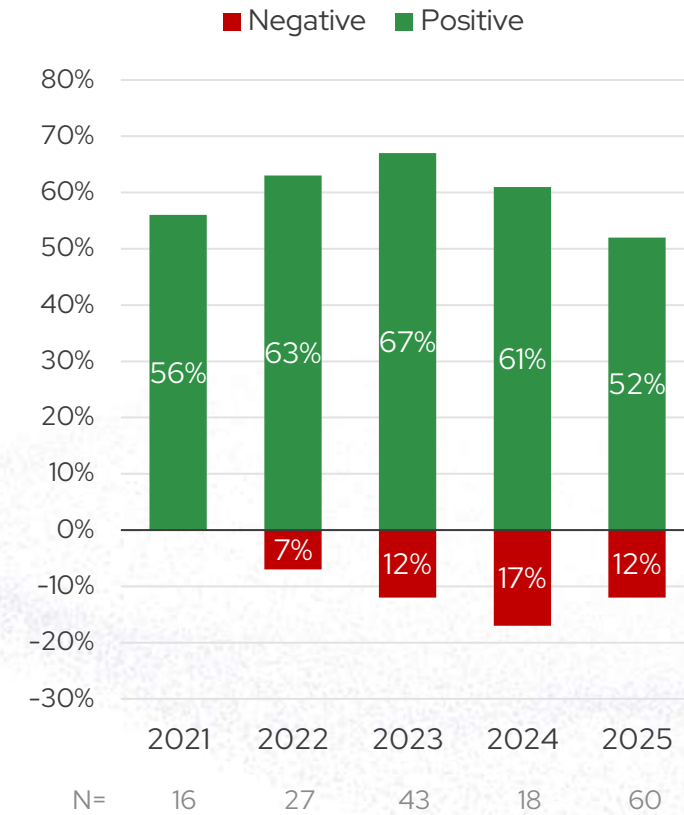
The decline in business confidence is mainly attributed to EMEA & APAC



EMEA



APAC



Americas

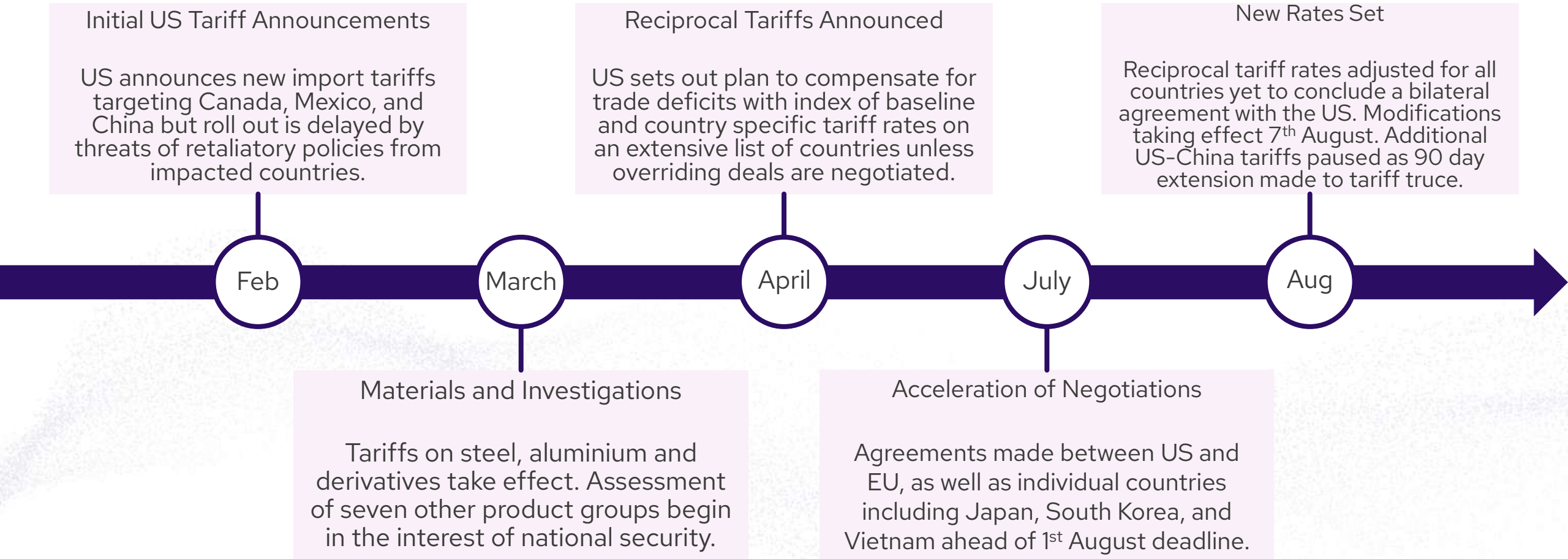


Source: IABM MediaTech Industry Tracker

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

Business Environment

Ongoing trade negotiations feed market uncertainty



Source: Peterson Institute for International Economics

Please note the above timeline is intended as a retrospective summary of key milestones in ongoing US trade policy development as of September 2025. It does not represent an exhaustive list of all policy updates introduced in this period.

Business Environment

Intel central to US semiconductor supply chain

US Government Funding Source



■ US CHIPS and Science Act Grants ■ Secure Enclave program

CHIPS and Science Act

Grants awarded to incentive investment in semiconductor manufacturing in the US. Intel has received \$2.2 billion in grants prior to the announcement of the investment in common stock, equating to an overall total of \$11.1 billion in government investment.

Secure Enclave

Department of Defense initiative aims to establish end-to-end production capability for advanced semiconductors for military application.

Source: Intel

Business Environment

Industry collaboration accelerates transition to live and on-demand streaming



In August 2025, Disney finalized its partnership with the NFL that gives the NFL a 10% equity stake in ESPN, valued between \$2-3 billion, while ESPN acquires the NFL Network, NFL RedZone, NFL Fantasy, and other media assets from the league. Disney aims to boost ESPN's profitability while NFL leverages Disney's distribution for expanded reach. The deal is part of a broader trend of streamers investing in live content (particularly sports) to reduce churn and increase ARPU.

In June 2025, Netflix signed a strategic partnership with French broadcaster TF1 to stream their programming live and on-demand starting summer 2026. This move marks a precedent for aggregating live TV with streaming content.

Streaming service provider in Earnings Call

*The fundamental purpose for this TF1 partnership is all about that goal of **expanding our entertainment offering**. How do we enhance the value we deliver to members? We want to provide more content, more variety, more quality. So just as you've seen us do with licensing and production, this is just another mechanism to expand that offering. And in this case, **it's specifically about highly relevant local for local content** in a country that has strong demand for that local content. This is an accelerated way to satisfy that need.*

Gregory K. Peters, Co-Chief Executive Officer &
Director at Netflix
(June 2025)



Source: Netflix

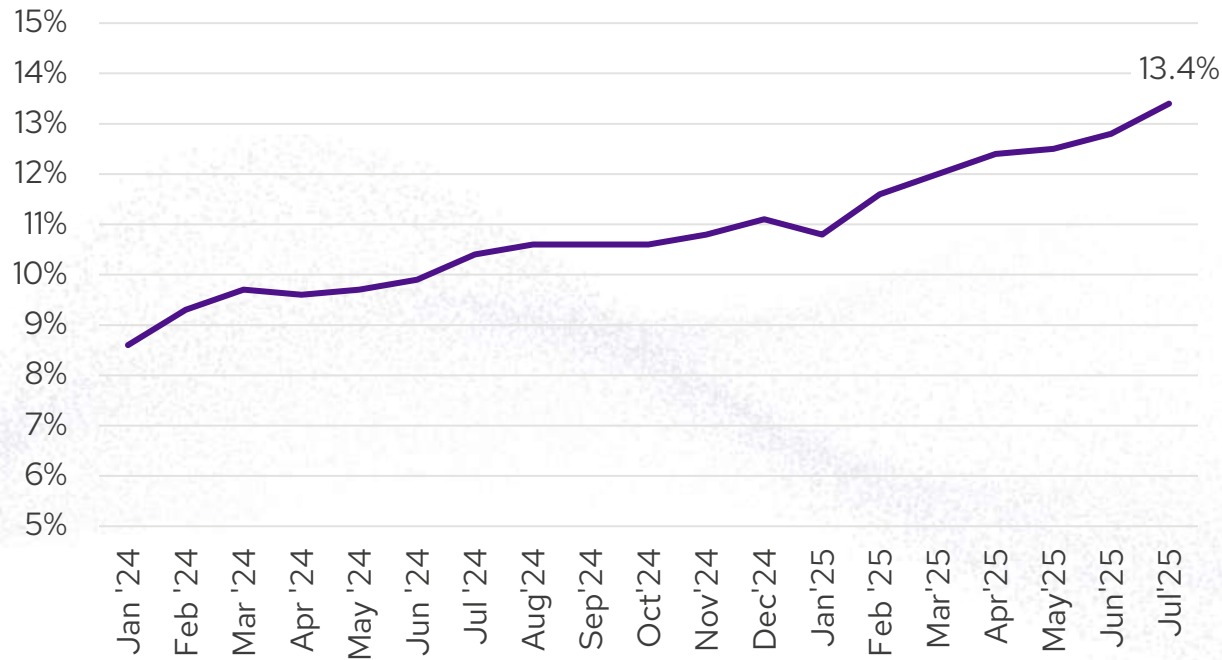
Business Environment

Social media are reshaping media landscape, introducing new business models



YouTube continues to grow its share of TV viewing in the US, maintaining its position as the leading media distribution channel.

YouTube's share of TV viewing in the US



Source: IABM, Nielsen, Bundesliga

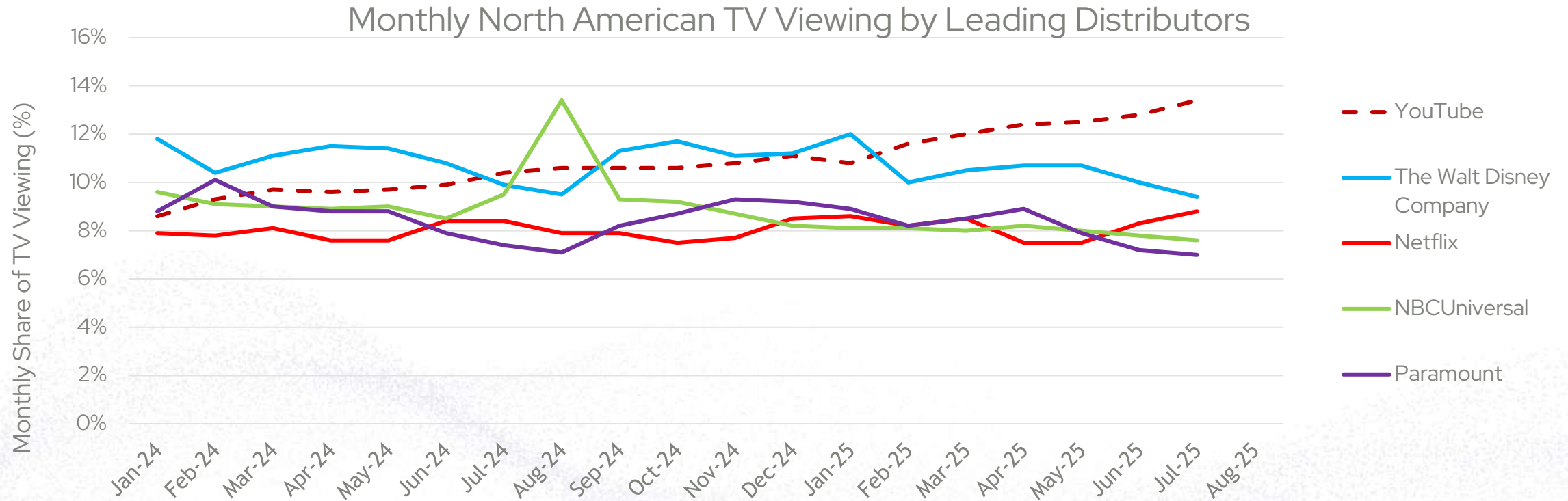
Social media in sports rights

In August, Bundesliga International became the first major European league to hand some media rights to content creators and influencers. YouTube will stream up to 20 matches on its influencer-run channels, marking a radical shift in rights distribution.

Prime Video has also been granted exclusive rights to stream all Sunday matches on a pay-per-view basis in the UK.

Business Environment

YouTube's leading share of TV viewing is still rising



After superseding all competing media distributors for the first time in terms of monthly viewing share on TVs in the US in July 2024, YouTube has established a consistent leadership over the past six months. Advertisers are recognising YouTube as a destination for longer form advertising and annual digital ad spend for YouTube ad campaigns on TV screens, as opposed to mobile, is rising.

Source: IABM, Nielsen Gauge

Business Environment

Diverging approaches to the future of linear broadcast are taken



The Future of Linear Channels

Linear channels are under scrutiny as media organizations register a decrease in revenue and viewership for these assets. While brands such as Paramount, a Skydance Company have asserted that these assets still hold value, they are clear that transformation is necessary.

Comcast on the other hand has taken a more direct approach spinning off select cable television networks into an independent media business, Versant. The Versant portfolio is composed of assets that brought in \$7 billion in revenue in the year ending September 30, 2024, including USA Network, CNBC, MSNBC, Oxygen, E!, SYFY, and Golf Channel as well as the digital assets Fandango, Rotten Tomatoes, GolfNow and Sports Engine.

Media organization press release

We're thinking about the cable network not as declining linear assets that we need to split up or deal with somehow. We're thinking about those brands that we have to redefine [...] our intention is to keep the company together and invest through that lens long term.

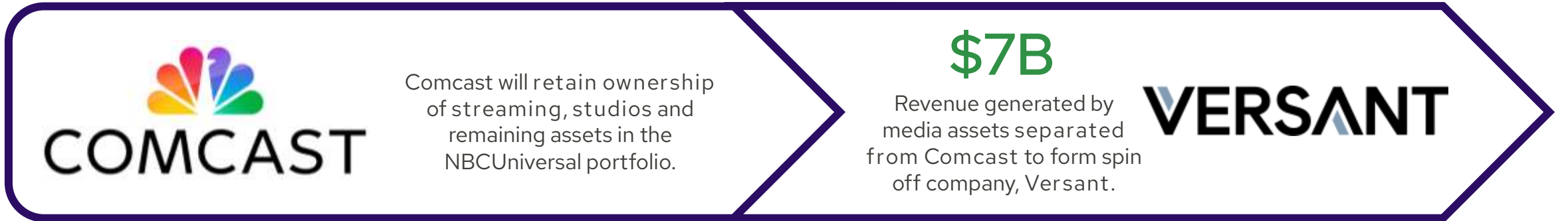
David Ellison, Chairman and CEO
Paramount, a Skydance Corporation
(August 2025)



Source: IABM, Comcast, Paramount, a Skydance Corporation

Business Environment

Comcast spin off Versant to focus on individual brands



Source: Comcast

Business Environment

Warner Bros. Discovery splits in two to navigate network decline



Warner Bros. Discovery Annual Revenue Generated by Source



Business Transformation

In June 2025 Warner Bros. Discovery announced the organization would be separated into two publicly traded companies with the aim of growing streaming and studios without being held back by linear network operation.

The streaming focused entity will hold leading IP including Warner Bros, DC Studios and HBO Max. The other will hold network brands including CNN, TNT Sports and Bleacher Report.

Source: WarnerBros Discovery Company Filings

Business Environment

Transformation continues to define media organizations' strategies



Business Transformation

After a two-year merger process between Paramount and Skydance, Chairman and CEO, David Ellison outlined his vision for the new unified company, Paramount, a Skydance Corporation, in August 2025.

The message highlighted their focus on direct to consumer offering and positioning Tubi as a top-of-funnel gateway into Paramount+.

The organization will reduce its technology spend by migrating to a single technology platform in pursuit of efficiency and performance gains.

Media organization press release

We recognize that sustained, profitable growth is not achievable in today's relentlessly dynamic market without far-reaching changes that will make us a leaner, faster, smarter, and more agile company. Toward that end, the coming months will be defined by a series of focused efforts to reengineer how our company operates, produces its creative content, and goes to market."

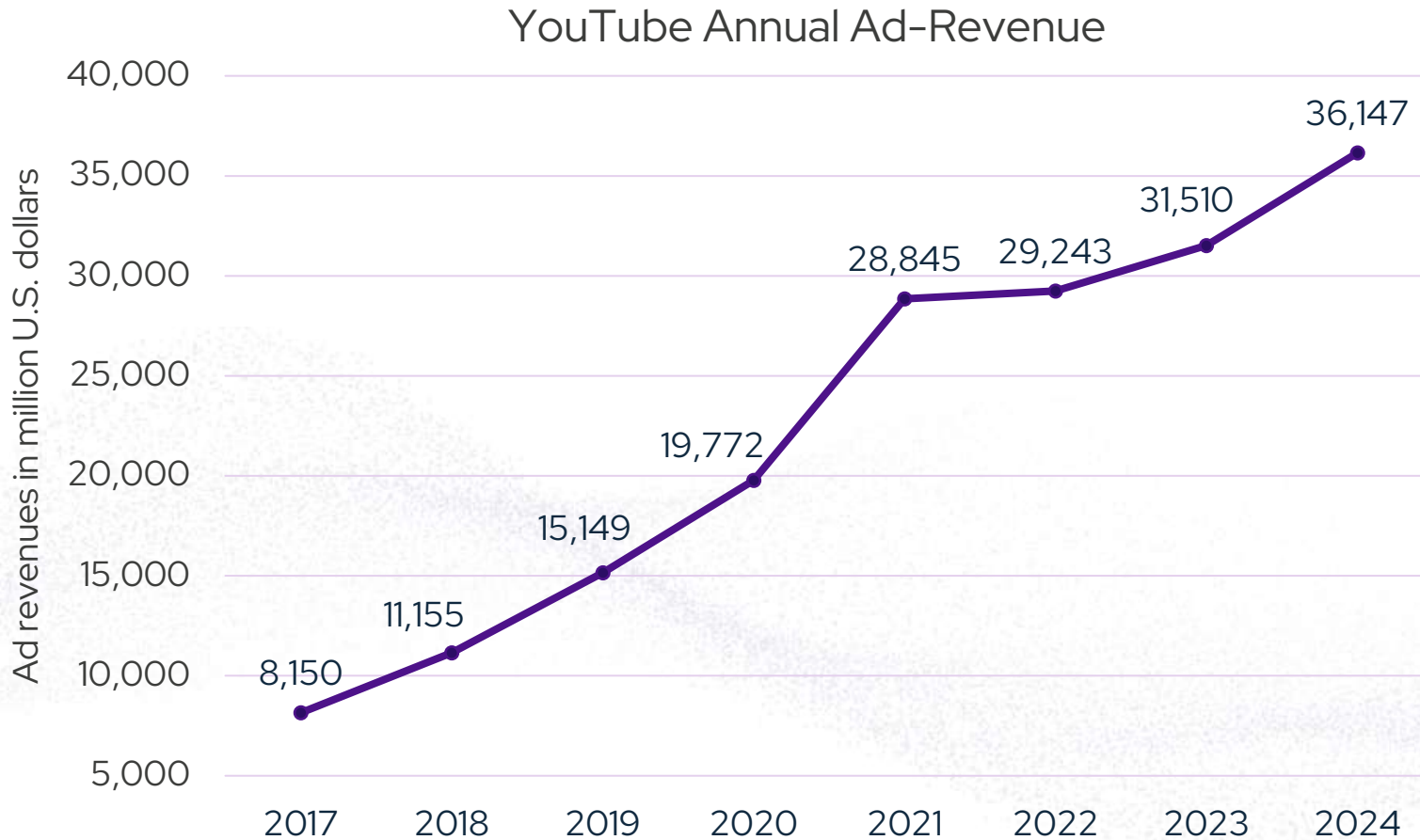
David Ellison, Chairman and CEO
Paramount, a Skydance Corporation
(August 2025)



Source: IABM, Paramount, a Skydance Corporation

Business Environment

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



90B

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



\$18.5B

Ad revenue earned by TikTok in 2024



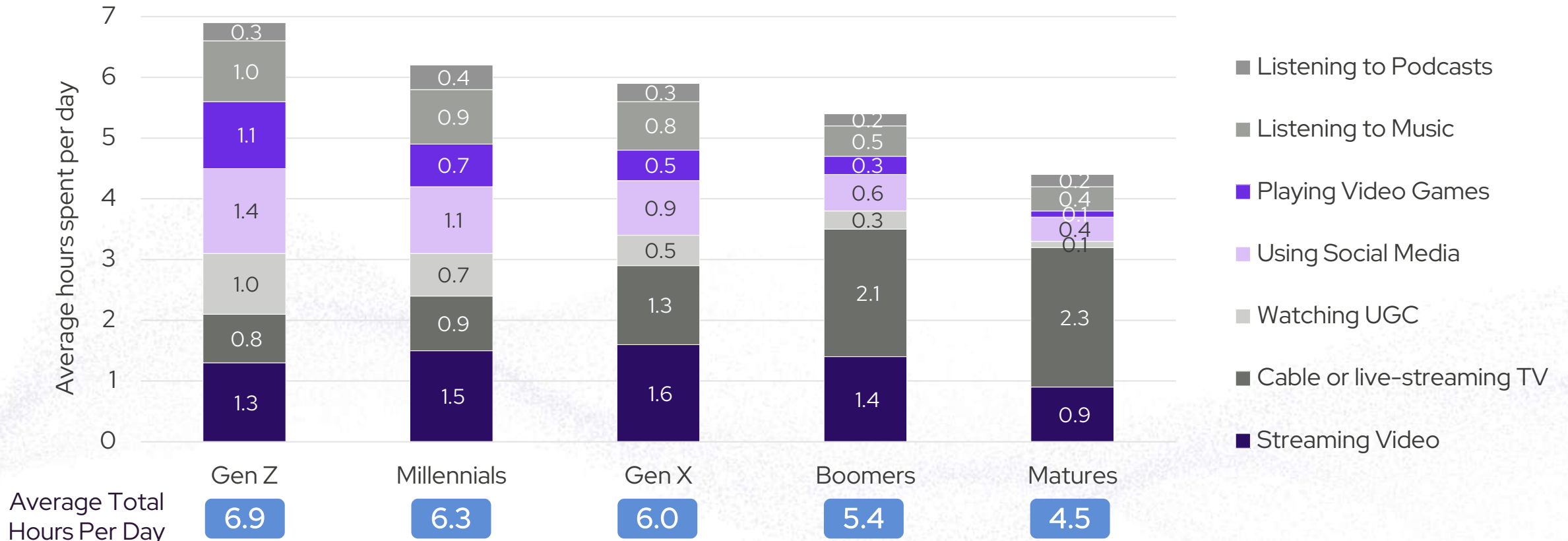
Source: IABM, YouTube, TikTok Company Filings

Business Environment

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



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



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

Source: IABM, Deloitte Digital Media Trends, 19th Edition (March 2025)

Business Environment

Amazon and Roku partner for CTV authentication



Unified Measurement

Roku and Amazon announced their partnership in June 2025 to unify authenticated logged-in audiences across their platforms.

With Roku's leading position in media streaming the partnership provides advertisers access to the largest CTV solution for North American market.

Roku operating system, The Roku Channel, Amazon Fire TV, and Amazon Prime Video. Viewer data can be shared across different streaming channels and devices to enable more accurate measurement and tracking than before combining data from Roku Platform and Amazon DSP Insights.

Media company in press release

This collaboration delivers a unified, future-ready solution at an unprecedented scale, one designed to drive measurable outcomes by unlocking performance across CTV

Charlie Collier, President

Roku Media

(June 2025)

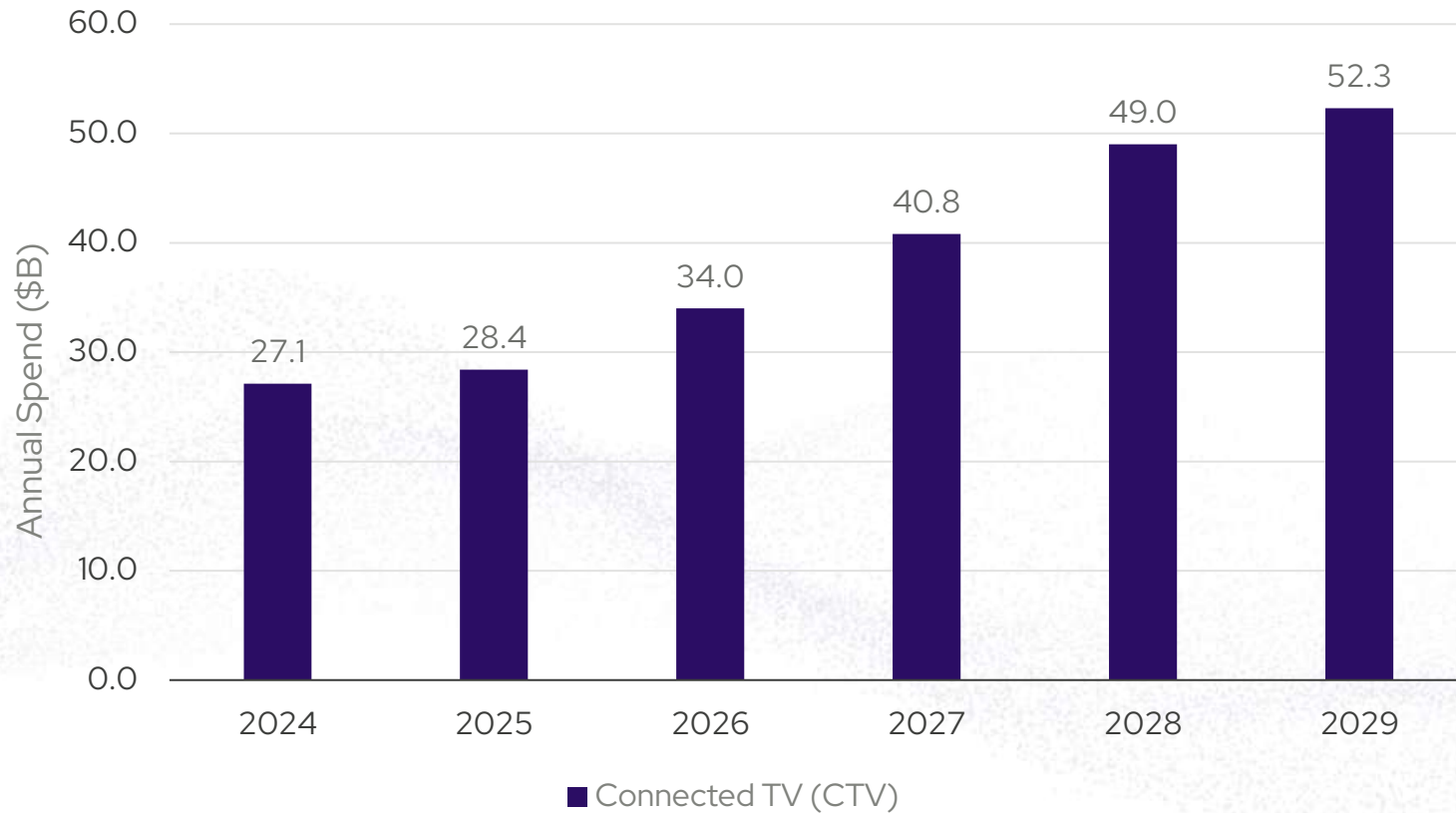


Business Environment

CTV a key destination for advertising spend



Worldwide Connected TV Spending



Streaming Growth Enhances CTV Ad Spend

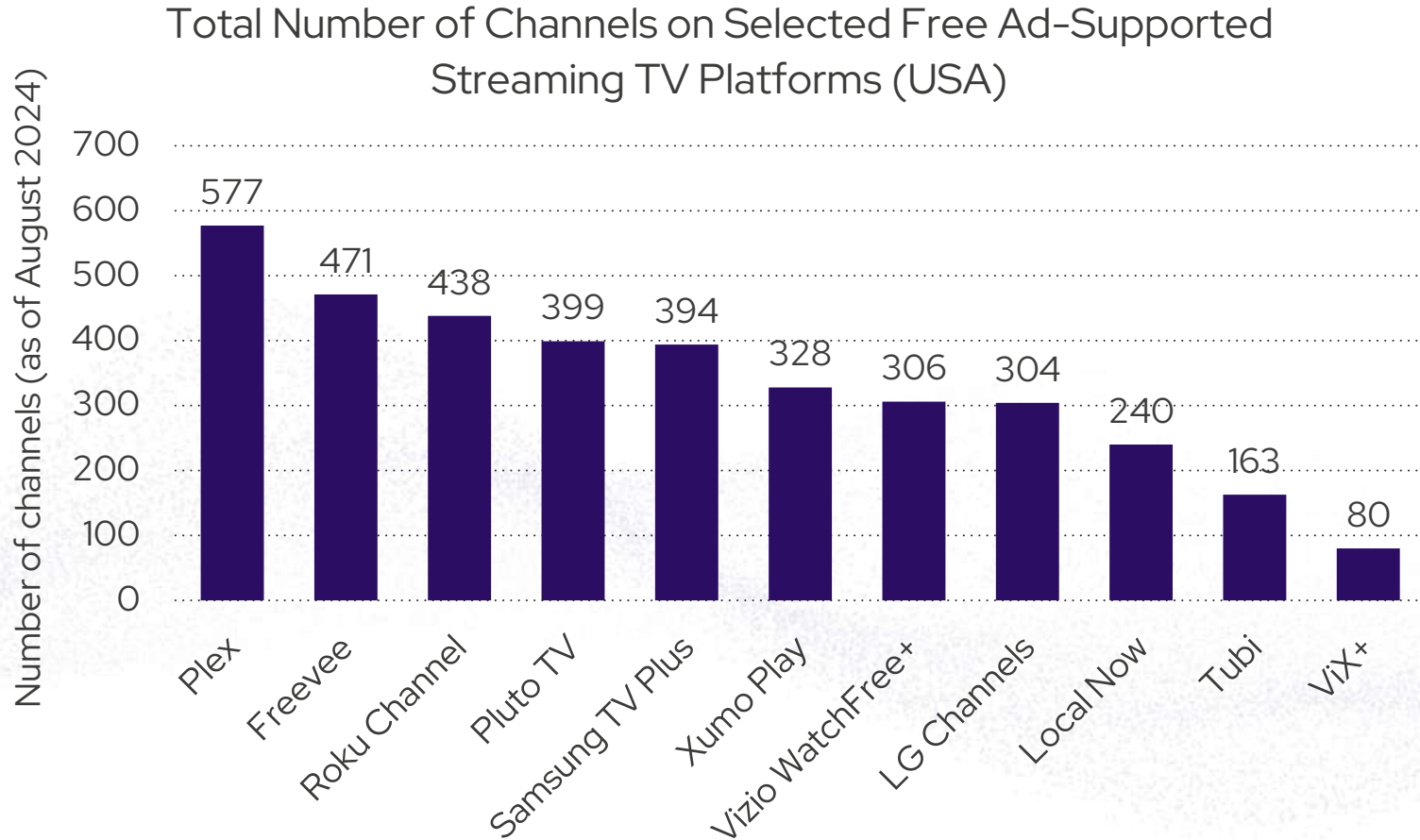
CTV (connected TV) enables advertisers to deliver targeted advertisements based on user data, viewing habits and demographics.

IDC forecasts 14.1% CAGR for worldwide CTV spend over the next five years.

Source: IDC Worldwide Retail Media Network and Connected TV Forecast, 2025-2030

Business Environment

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



FAST Channels Proliferate

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

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

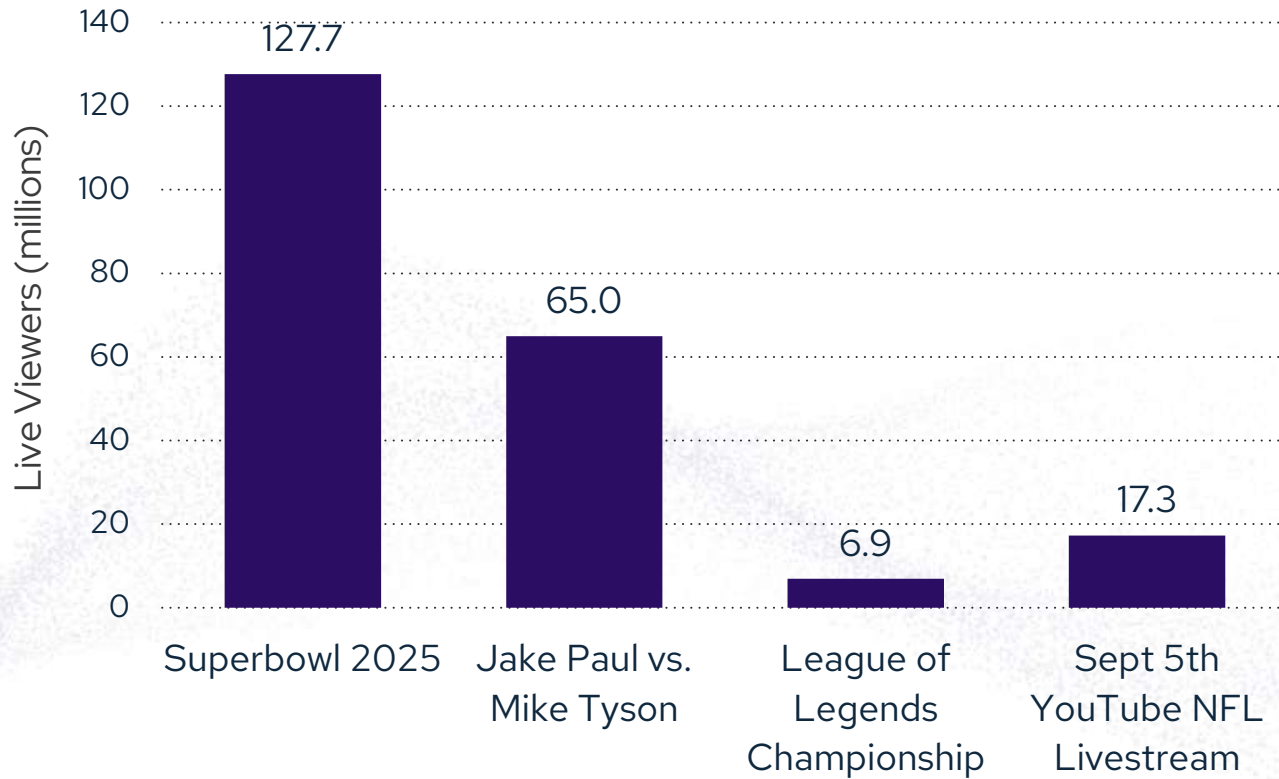
Source: Statista

Business Environment

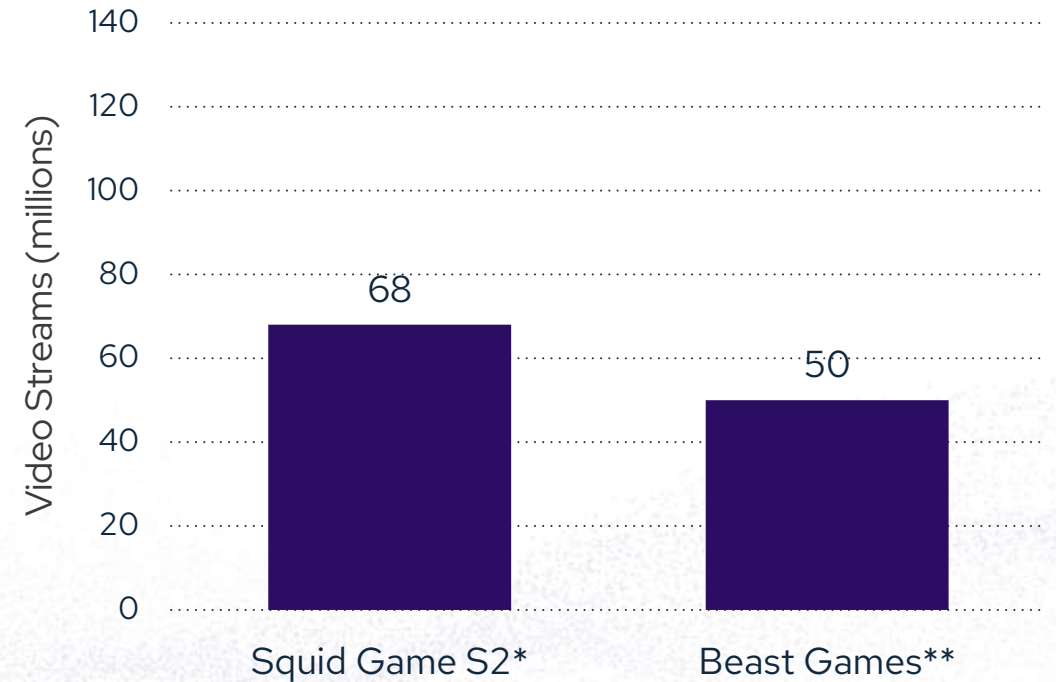
Creator led-content delivers promising results for streamers in 2024



Viewership comparison of selected live sports events



Viewership comparison of selected on demand streaming originals



*Netflix reported premiere 1 week total
**Amazon reported 25-day total

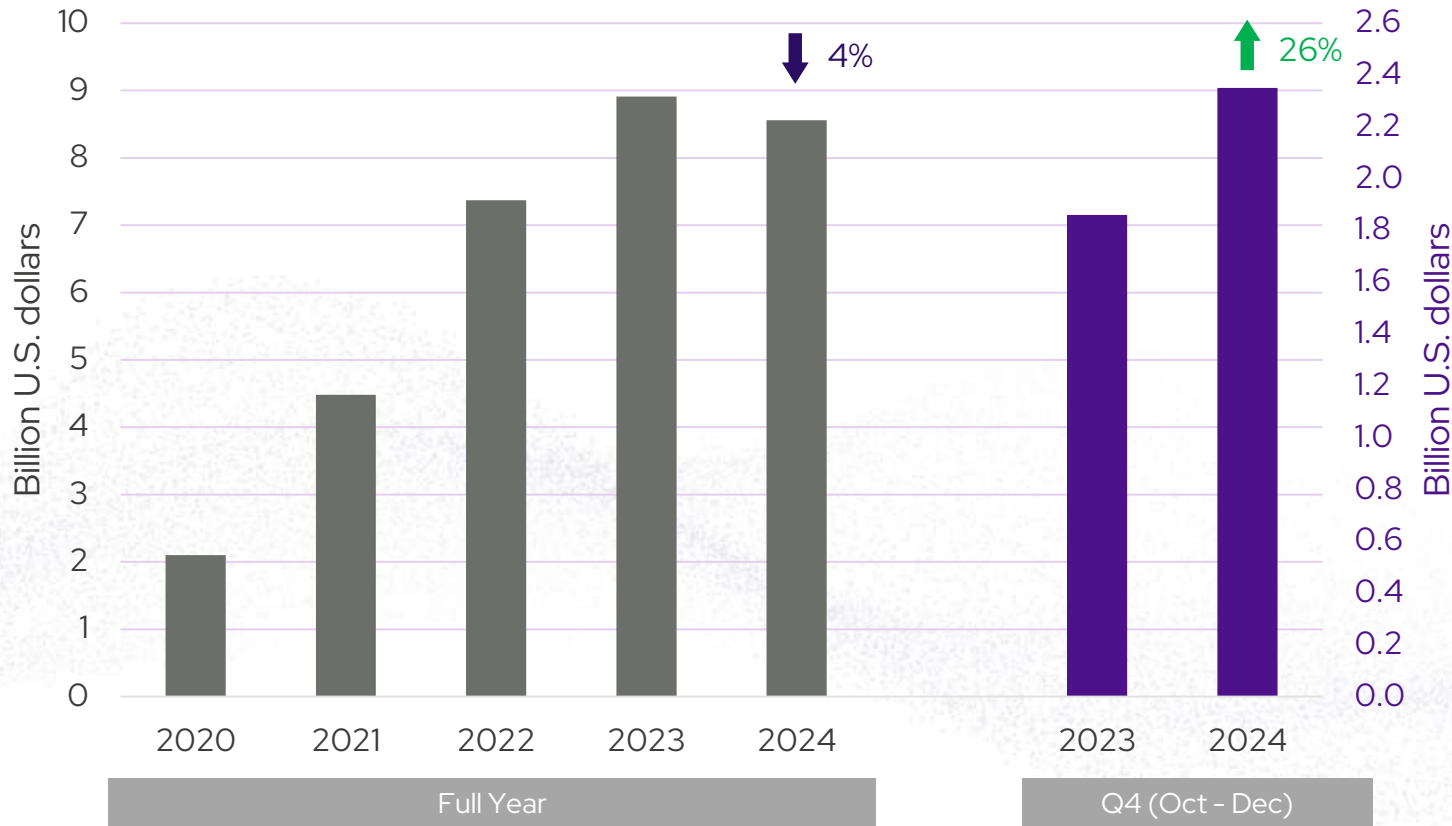
Source: Company Filings

Business Environment

Held over impact of strikes limits 2024 box office total



Box office revenue in North America



Battling the Content Gap

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

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

Source: IABM, Box Office Mojo, Los Angeles Times

Business Environment

2025 box office successes evidence importance of theatrical release



Improving prospects for the global box office have been tied to an improving slate of releases from major studios as the past two years suffered from a limited pipeline of productions due to the impact of the WGA and SAG-AFTRA strikes. A number of standout box office successes in 2025 YTD evidence the continued importance of theatrical releases for feature films to build prestige and generate word of mouth to stimulate engagement with titles not only in the cinema but also on streaming services. Disney's 2025 live action remake of *Lilo & Stitch* was able to contribute a global box office of \$1.04b for Disney despite being originally slated as a straight to streaming exclusive.

Although superhero titles have dominated box office leaderboards over the past decade, IP from video games are increasingly being explored for development due to the franchise potential built into IP with established media universes.

Titles shot for IMAX are able to generate higher average ticket sales through premium release strategies on larger cinema screens.

\$1.04B

Second highest grossing film globally in 2025 YTD, *Lilo & Stitch* was originally slated as an exclusive streaming release for Disney+



\$957.8M

A Minecraft Movie, the latest in a wave of successful video game adaptations, ranks third highest global for theatrical revenue YTD.



20%

North American box office revenue earned by *Sinners* through IMAX distribution



Source: Box Office Mojo

MediaTech Investment

Key drivers of change in 2025 and beyond

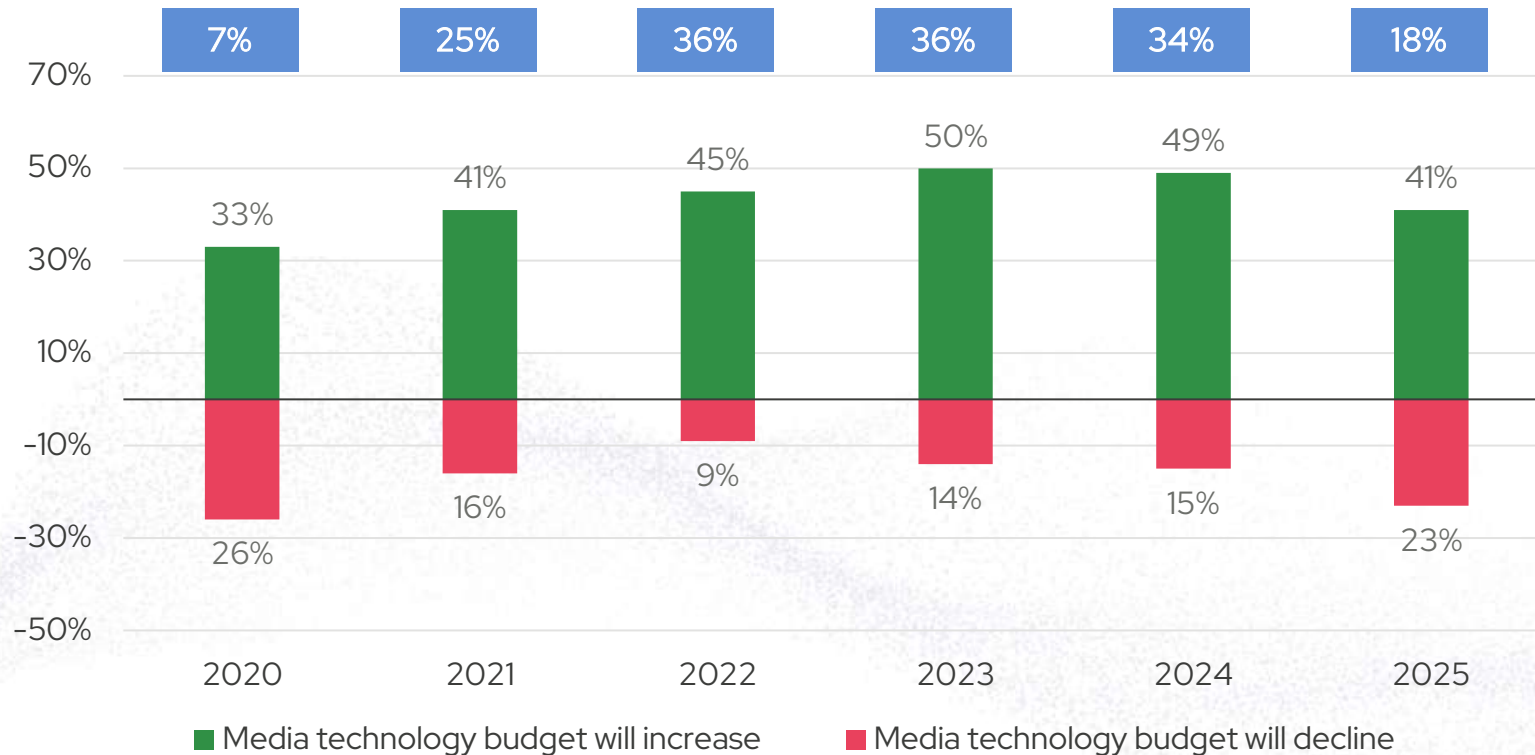
18 April 2026

MediaTech Investment

Investment is expected to be more conservative in the year ahead



MediaTech NET investment outlook



MediaTech Budgets

The less optimistic business environment outlook correlates with media technology investment, which is lower than a year ago, though still positive overall.

This decline in media technology investment is primarily driven by broadcasters, Pay-TV, and production companies. Meanwhile, streaming service providers are moving in the opposite direction, with 80% reporting their media technology budgets will increase next year.

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

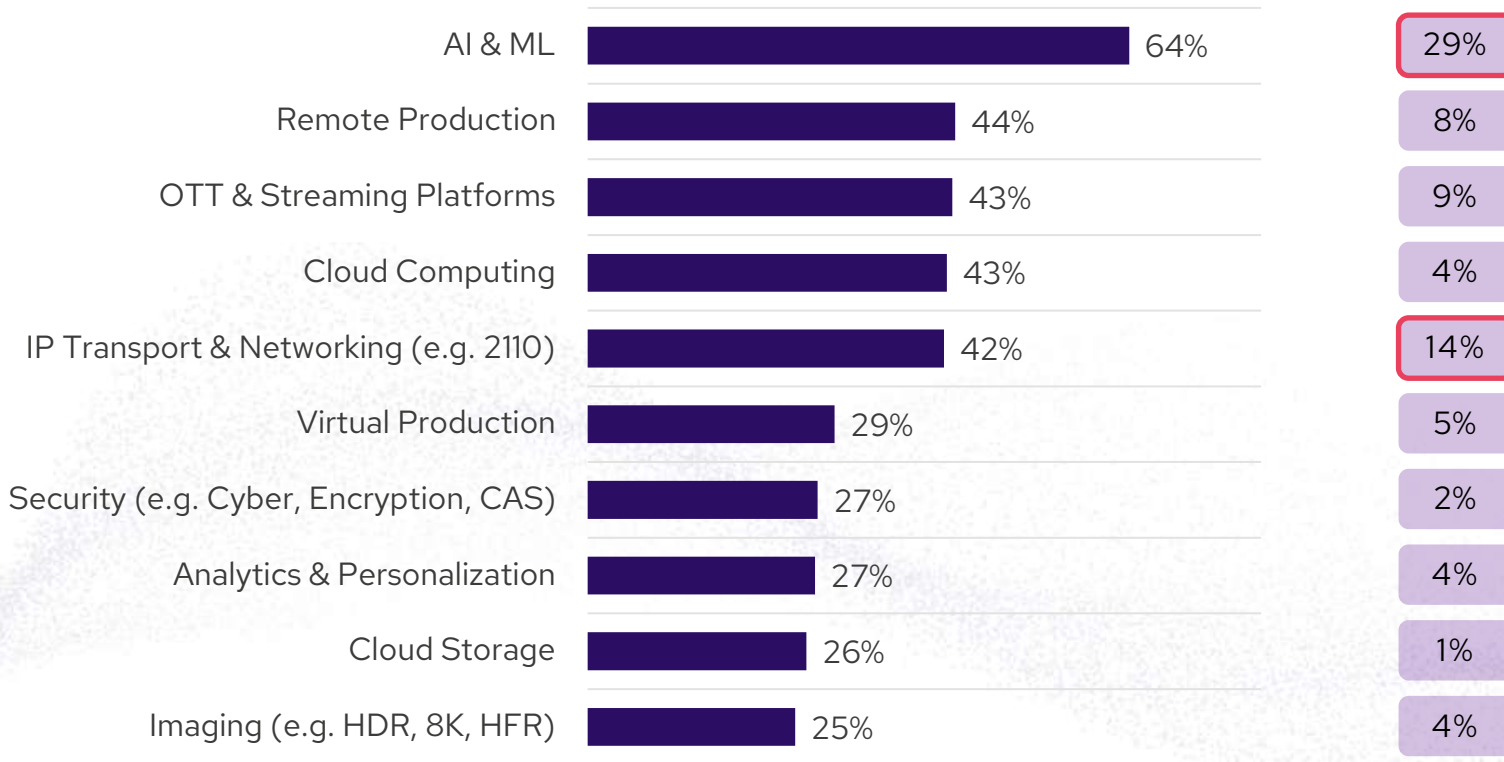
Source: IABM MediaTech Industry Tracker

MediaTech Investment

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



Technology Roadmap Priorities (Top 10) Main Priority



Artificial Intelligence

Artificial Intelligence and Machine Learning (AI & ML) is the top priority, with 64% of the industry considering it among the most important trends in their technology roadmaps.

IP transport & networking ranks second among the five most important trends when respondents were asked to prioritize just one technology. This represented one-third of all respondents who cited it as a priority in their technology roadmaps.

Q. What are the most important trends in your organization's technology roadmap? (All industry, 2025, n=300)

Source: IABM MediaTech Industry Tracker

MediaTech Investment

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



Rank	2024	2025
1	AI & ML (51%)	AI & ML (69%)
2	OTT & Streaming Platforms (46%)	Remote Production (46%)
3	IP Transport & Networking (42%)	OTT & Streaming Platforms (43%)
4	Virtual Production (33%)	IP Transport & Networking (42%)
5	Social Media (32%)	Virtual Production (41%)
6	Remote Production (31%)	Security (e.g. Cyber, Encryption, CAS) (26%)
7	Targeted/Programmatic Advertising (29%)	Imaging (e.g. HDR, 8K, HFR) (25%)

Source: IABM MediaTech Industry Tracker

Q. What are the most important trends in your organization's technology roadmap? (All industry, 2024 n=230, 2025 n=300).

Note: Cloud has been excluded from the analysis due to a change in methodology

MediaTech Investment

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



Rank	Q1 2025		Q3 2025	
1	AI & ML	60%	AI & ML	69%
2	OTT & Streaming Platforms	46%	IP Transport & Networking	46%
3	Remote Production	45%	Remote Production	43%
4	Cloud Computing	43%	Cloud Computing	42%
5	IP Transport & Networking	39%	OTT & Streaming Platforms	41%
6	Virtual Production	33%	Virtual Production	26%
7	Analytics & Personalization	33%	Security (e.g. Cyber, Encryption, CAS)	25%

Q. What are the most important trends in your organization's technology roadmap?
 (All industry, Q1 2025 n=150, Q3 2025 n=150)

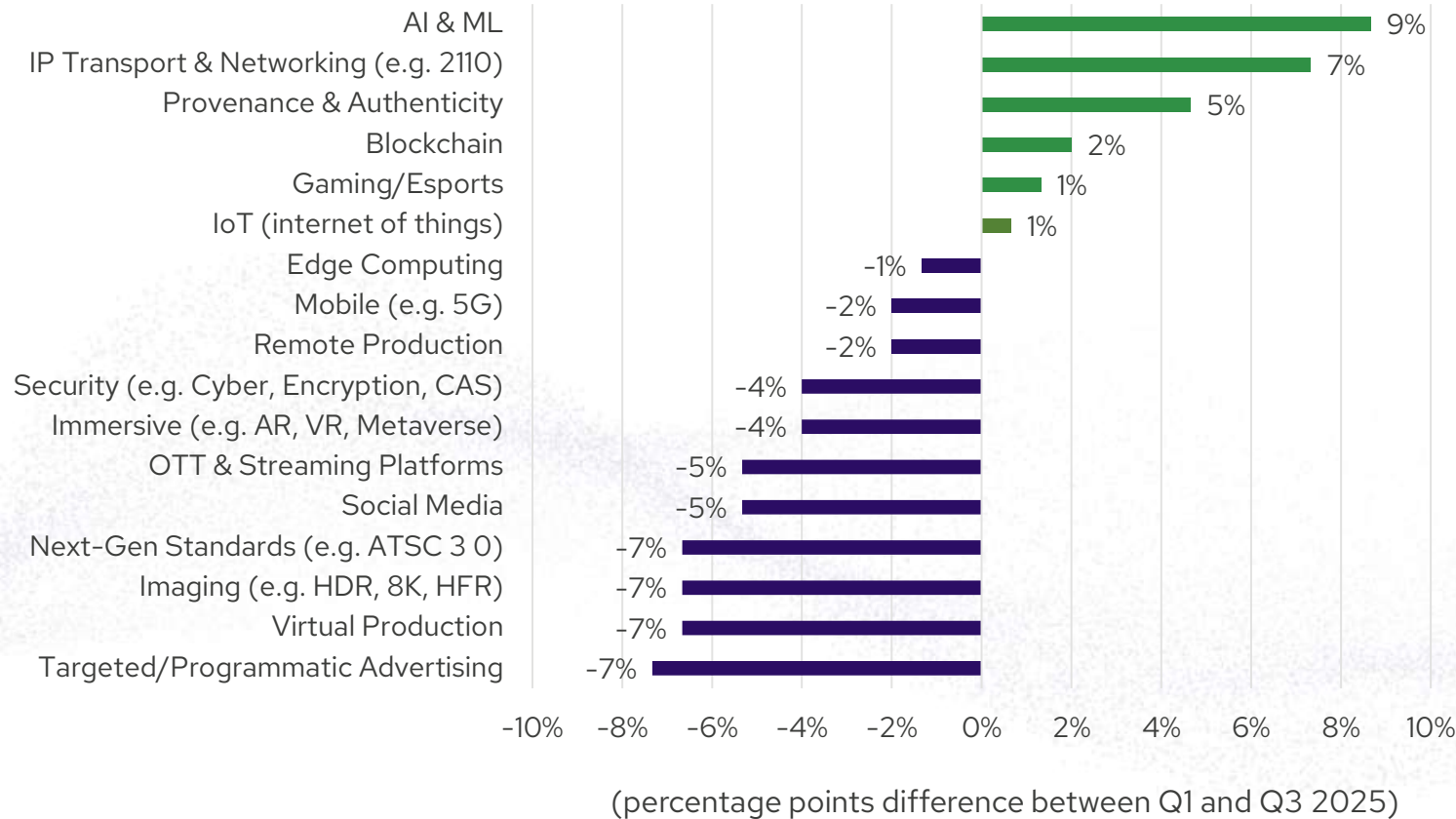
Source: IABM MediaTech Industry Tracker

MediaTech Investment

Transition to IP-based workflows is accelerating rapidly in 2025



MediaTech technology roadmap



IP Transport & Networking

The transition to IP-based workflows is accelerating rapidly in 2025, gaining 7pp in Q3 2025 compared to Q1 2025.

Artificial Intelligence

The rise of AI & ML has heightened the need for investment in provenance and authenticity to ensure audience trust – a trend that began gaining traction in 2025.

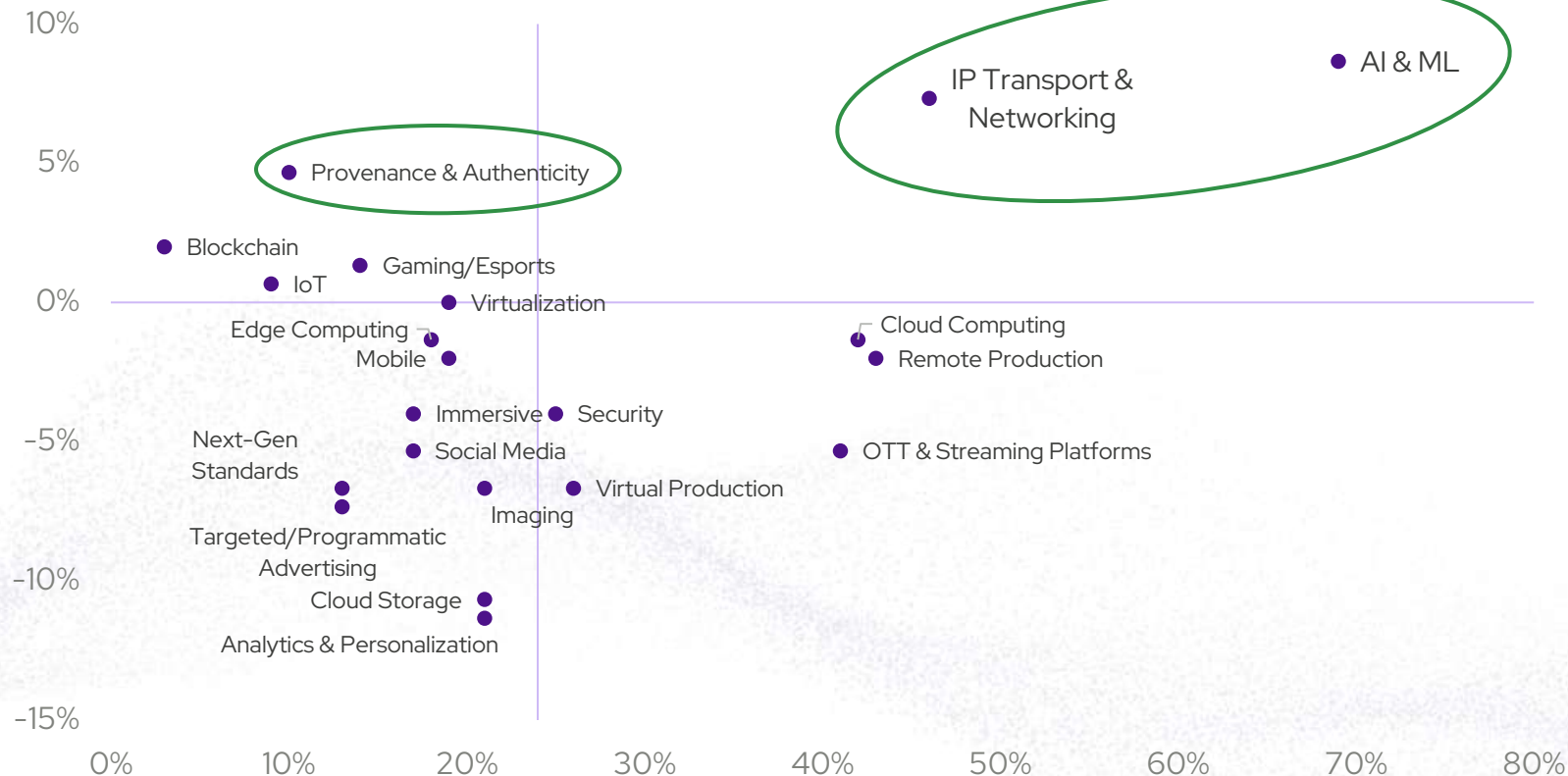
Source: IABM MediaTech Industry Tracker

MediaTech Investment

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



Technology Roadmap



Artificial Intelligence

Artificial intelligence and IP experienced the greatest increase in Q3 2025 compared to the beginning of the year.

Provenance & Authenticity

The emerging trend of provenance and authenticity is gaining traction during the year.

Q. What are the most important trends in your organization's technology roadmap?
(All industry, Q1 2025 n=150, Q3 2025 n=150)

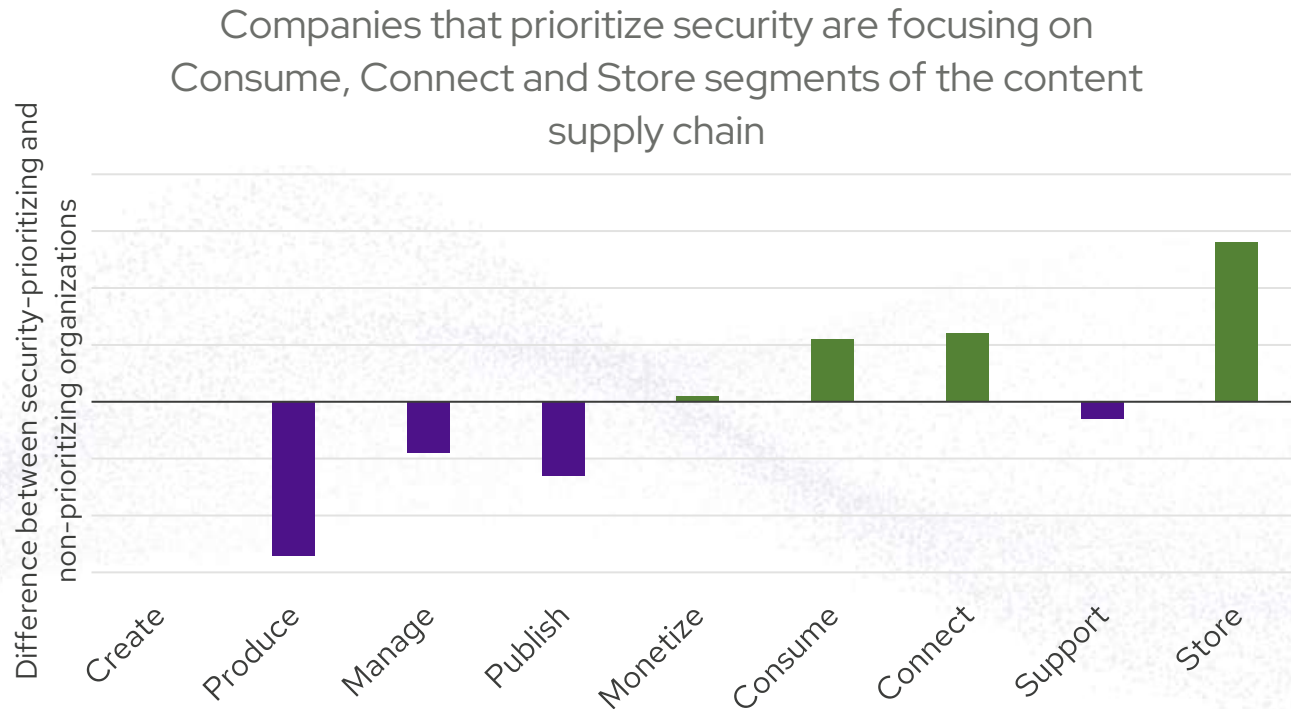
Source: IABM MediaTech Industry Tracker

MediaTech Investment

Security investment shifts toward the latter stages of the content supply chain



The highly fragmented streaming landscape and the vulnerability of streaming devices is shifting security investment to the latter stages of the content supply chain. The attack surface is now much larger due to software-defined workflows and the fact that the majority of audiences are consuming content on open devices, where various third-party software can be installed.



MediaTech Supplier in an IABM interview

This is not to say that content owners and production companies don't need to be careful about it – they definitely need to be careful in having the right measures in place – but if you see most of the piracy is happening downstream from that, really on the distribution side. I would say, 99.9% of the effort should be on the distribution side. That's really where most of the issues are happening.

Rodrigo Fernandes
Product Director Content Security
Irdeto
(June 2025)



Source: "Security in MediaTech Ecosystems" Megatrend Report. Data collection period: February–March 2025, N=150

Source: Security in MediaTech Ecosystems Megatrend Report

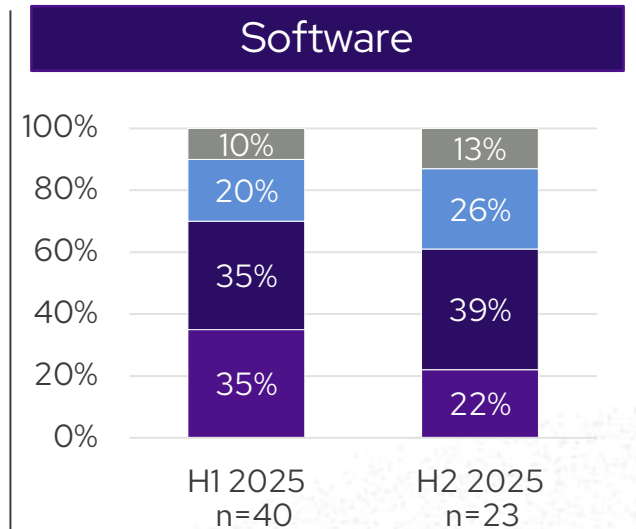
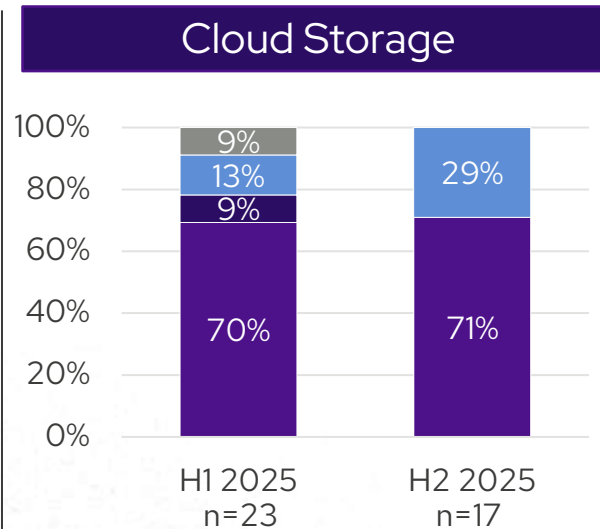
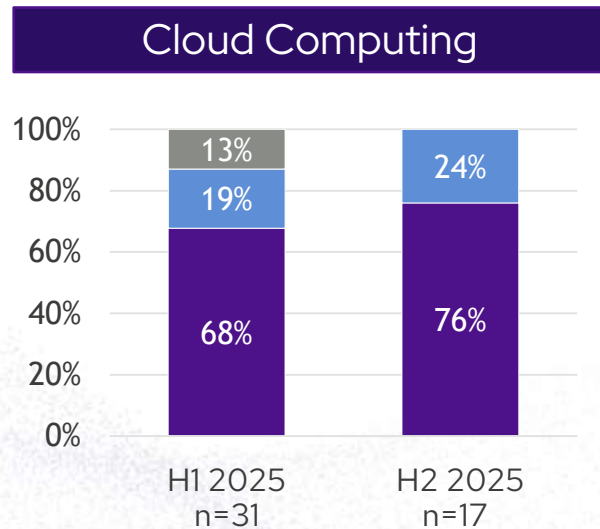
MediaTech Investment

Software and cloud services investment outlook and payment models

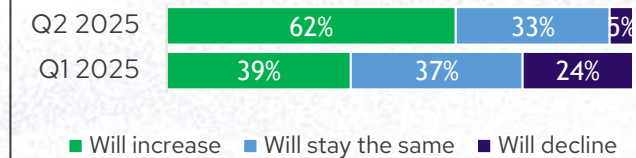
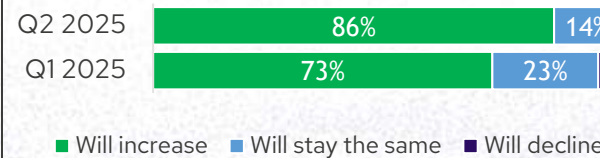
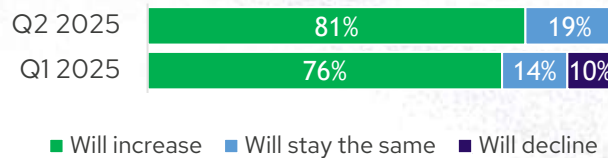


Preferred payment method:

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



Investment outlook:



* One-time fee for indefinite access to software or services

Q. How does your organization prefer to pay for the following products/services? Q. What is your outlook for your organization's different types of technology revenues over the next year? (Media/production companies, technology investment decision-makers and influencers)

Source: IABM MediaTech Industry Tracker

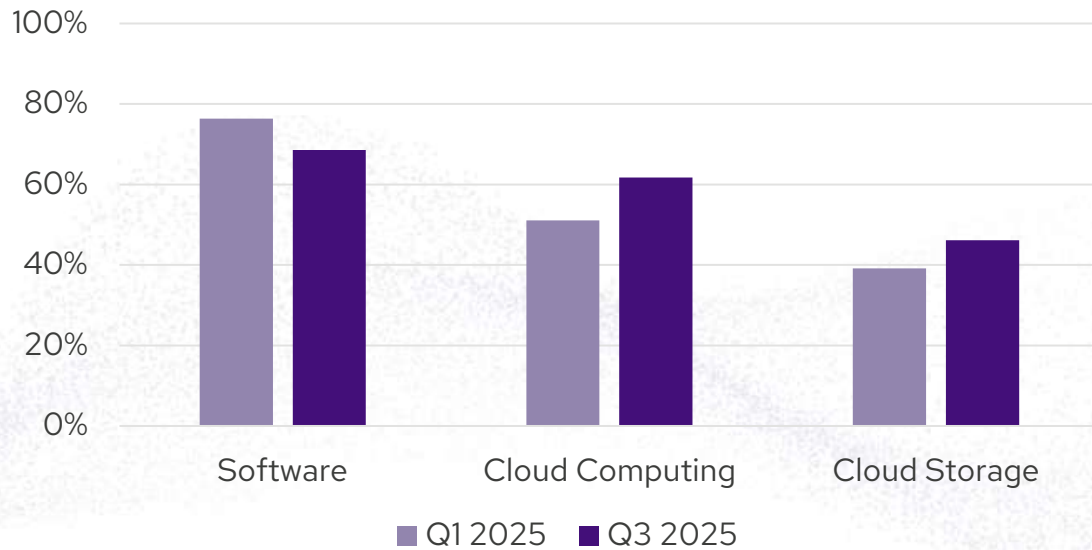
MediaTech Investment

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



Supplier revenue outlook

NET outlook (will increase minus will decline)

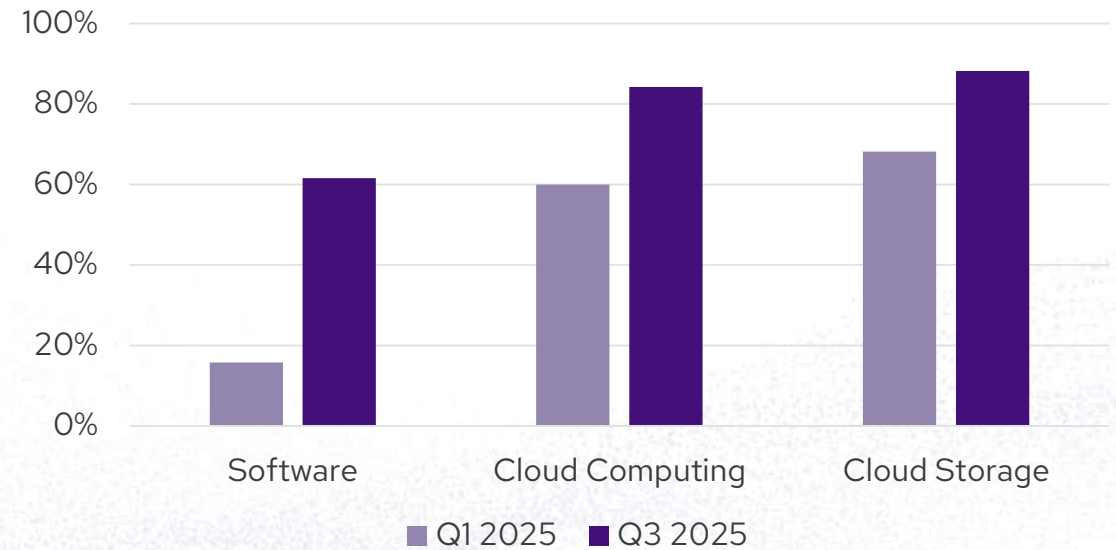


Q. What is your outlook for your organization's different types of technology revenues over the next year? (media technology vendors, sample size - from 23 to 72)



End user investment outlook

NET outlook (will increase minus will decline)



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 17 to 38)

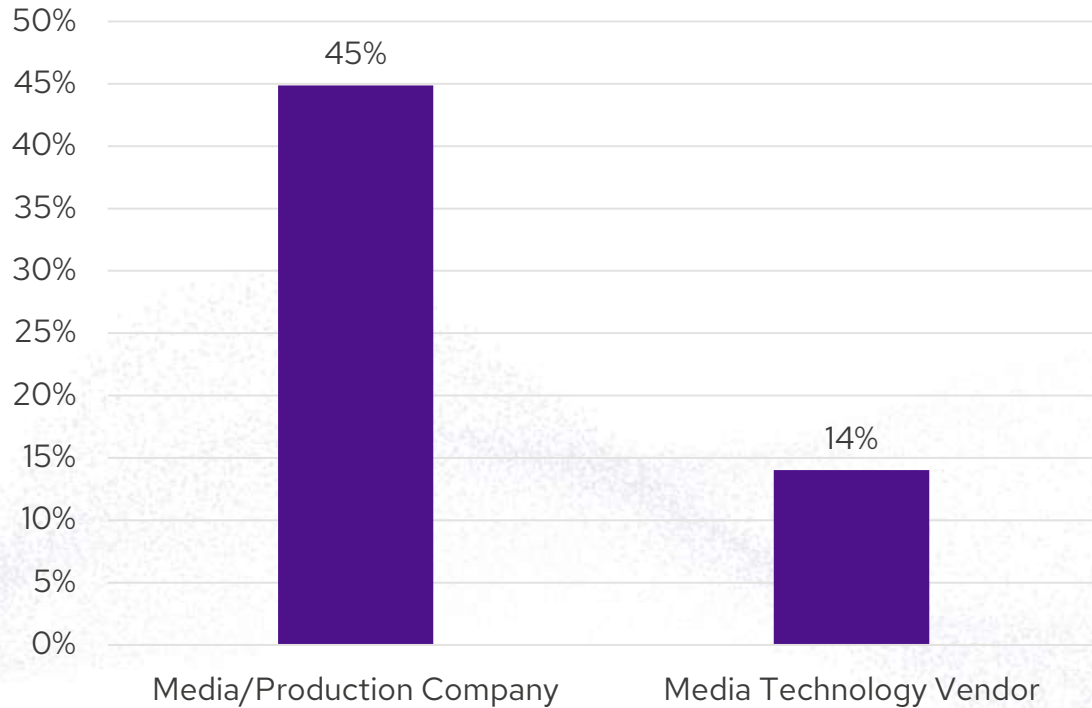
Source: IABM MediaTech Industry Tracker

MediaTech Investment

Media companies prioritize cloud storage, contrasting with media tech vendors

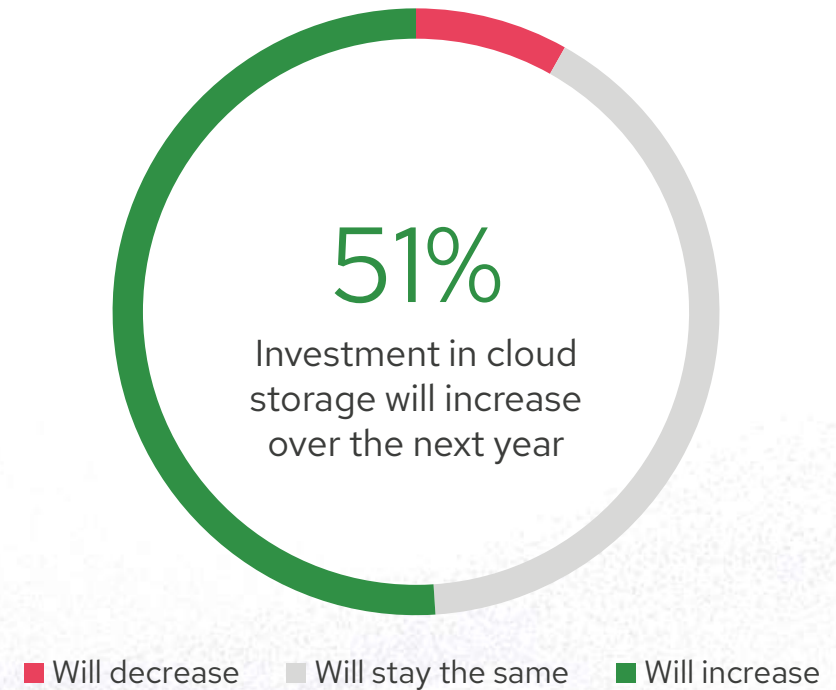


Cloud storage in technology roadmaps



Q. What are the most important trends in your organization's technology roadmap? (Q1 2025 n=150, Q3 2025 n=150)

Cloud storage investment outlook



Q. What is your outlook for your organization's different types of technology revenues over the next year? (Media/production companies, technology investment decision-makers and influencers)

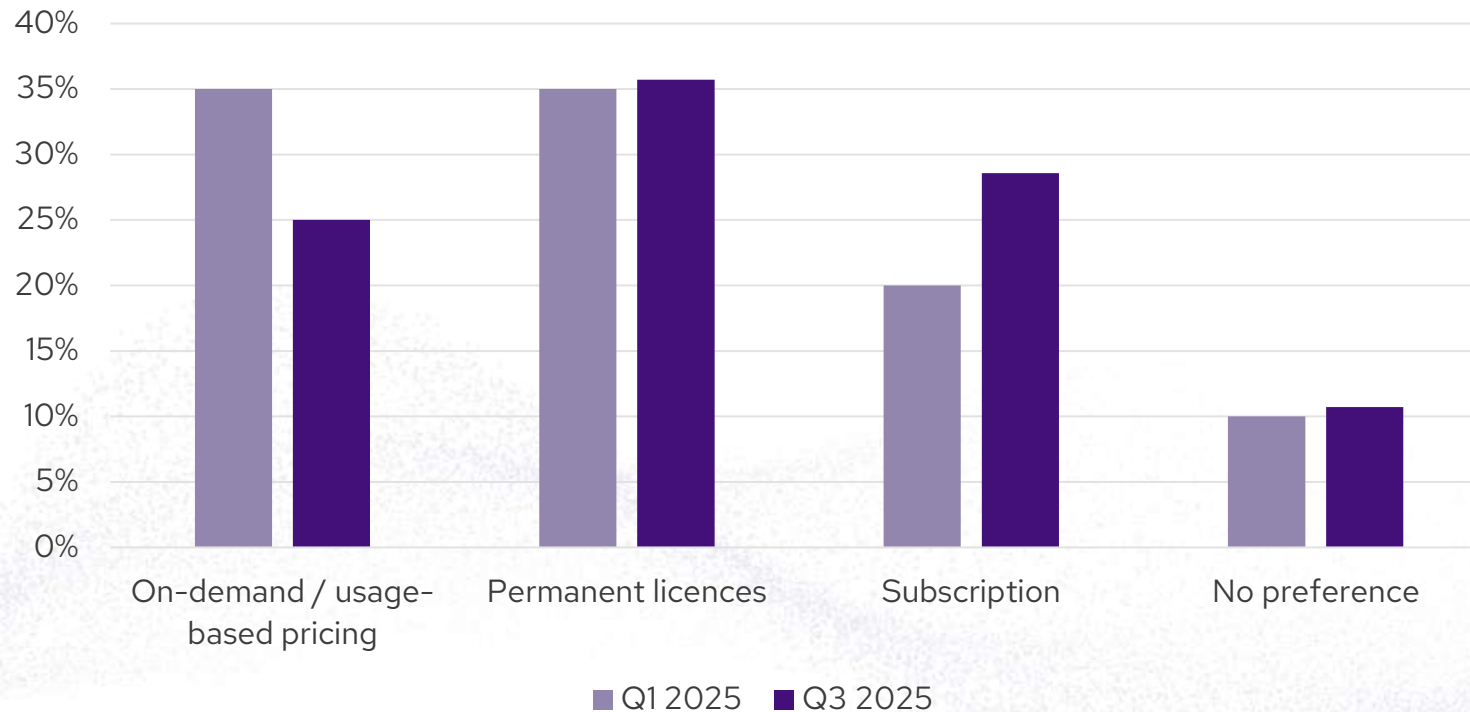
Source: IABM MediaTech Industry Tracker

MediaTech Investment

Payment preference for software is shifting from usage-based to subscriptions



Preferred payment method for software



Q. How does your organization prefer to pay for the following products/services? (media/production companies, Q1 2025 n=40, Q3 2025 n=28)

Subscription-based pricing

Payment preference for software shifts from usage-based pricing to subscription-based models.



Investment in security is growing

IABM data shows the growing importance of security (including cyber, encryption, conditional access) in broadcast and media industry's technology roadmaps. Security has risen by 5% points year-over-over in 2025 and became the second fastest-growing trend, following AI & ML.

Drivers of change



Transition to OTT and streaming



Transition to software-based workflows

Strategies to address cyber threats



Strengthening perimeter (Zero Trust architecture)



Training employees



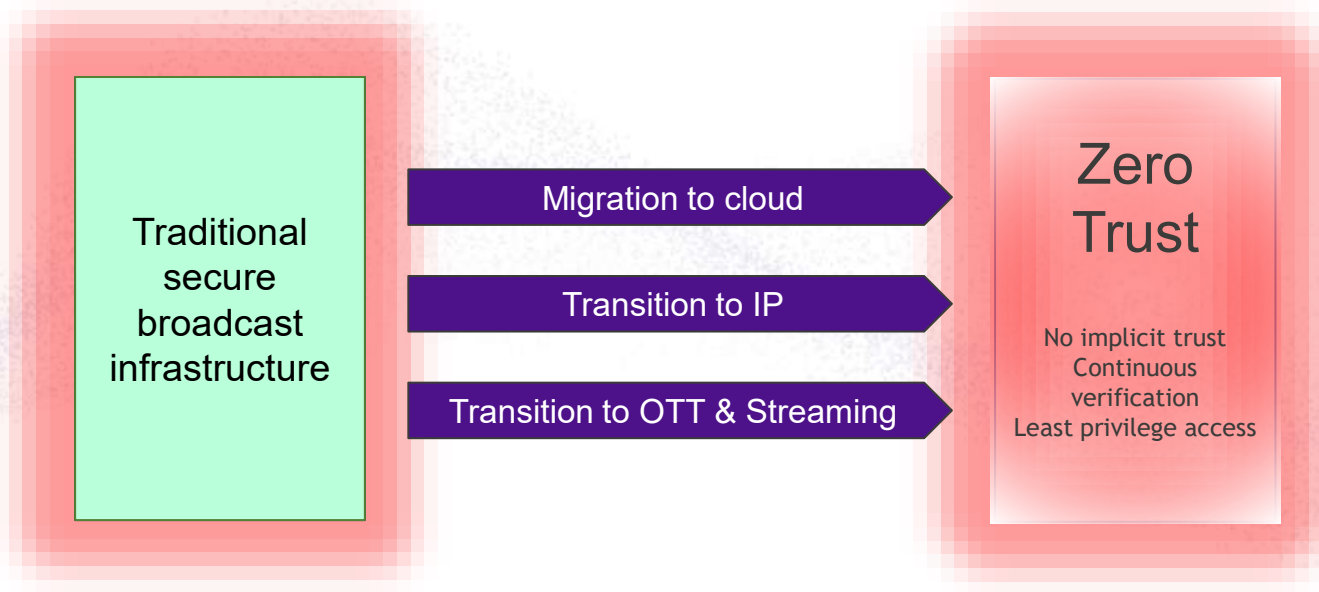
Fostering collaboration

Source: Security in MediaTech Ecosystems Megatrend Report

MediaTech Investment

Securing Infrastructure: Zero-trust security model

Due to digital transformation in the broadcast and media industry, the traditional security framework, which treats everything outside the facility and any outside actors gaining access to the network as a threat, has evolved into the zero-trust security model. This implies that everything inside or outside of the network is a potential threat, including human errors, misconfigurations of cloud environments, internal and external malicious actors, etc.



MediaTech Supplier in an IABM interview

In the past, when distribution of content was within a facility or within a secure environment, there was an implied assumption that you're within a secure environment. Your networks are secure. Your machines are secure. The people in it are trusted, so you have to only focus on how to encrypt the content on one end and take it out on the other end. Now, with these very complex workflows that go from facility to facility, often bouncing over cloud, and in a B2B model from the cloud to many end users, the assumption that you're in a secure environment goes away.

Sergio Ammirata
Chief Scientist
Sip Radius
(June 2025)



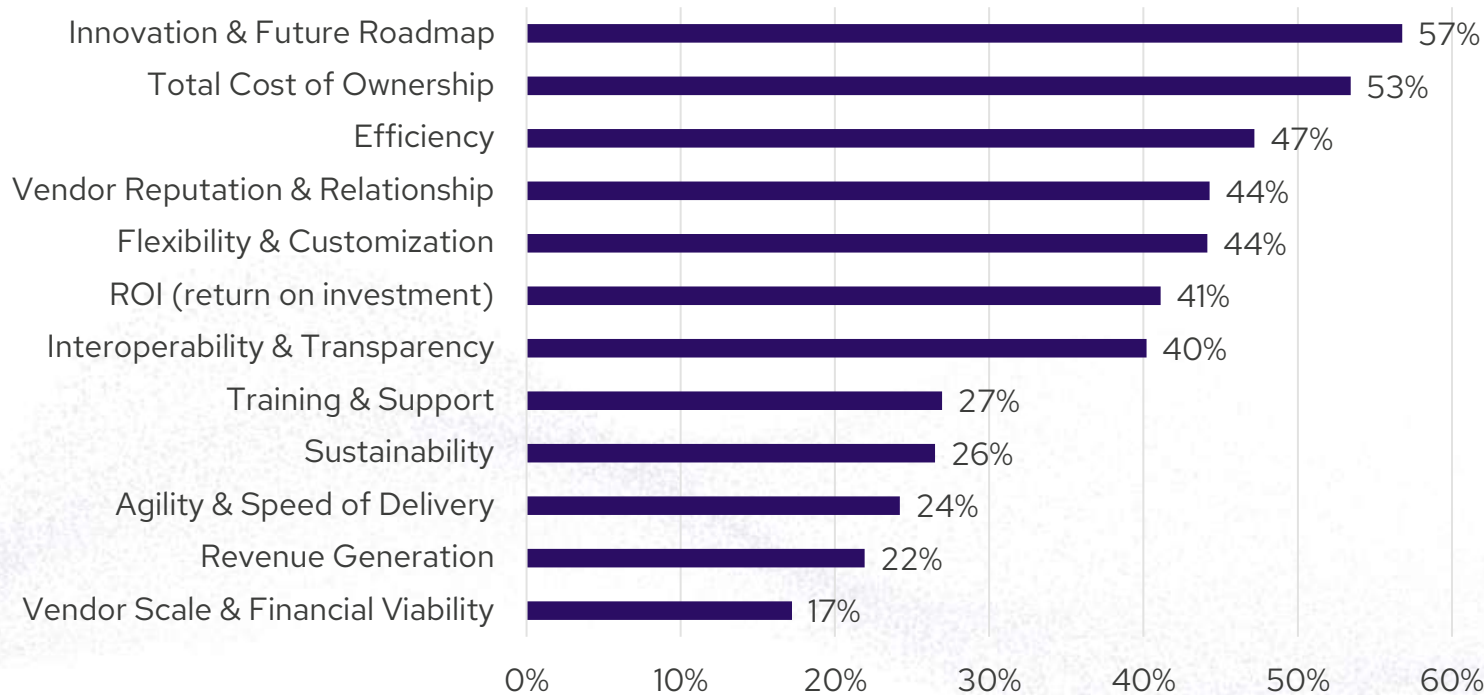
Source: Security in MediaTech Ecosystems Megatrend Report

MediaTech Investment

Innovation, total cost of ownership and efficiency keep driving investment decisions



Technology Purchasing Factors



Purchasing factors
Innovation & Future potential and TCO remain key factors driving media technology purchasing decisions.

Focus shifts toward efficiency and interoperability in Q3 2025. Efficiency becomes the main investment driver.

The importance of ROI continues growing.

Purchasing decisions are increasingly driven by sustainability.

Q. In general, besides cost and technical specification, what are the most important factors that influence your decision to purchase media technology products and services? (media technology buyers, 2025 n=88)

Source: IABM MediaTech Industry Tracker

Setting Boundaries on Gen AI Usage

Throughout 2025 leading broadcasters and streamers have published guidelines, manifestos and statements of ethics detailing their stance on generative AI, and practical instructions to suppliers on permitted use, and best practice.

In August 2025, Netflix published a set of production guidelines on its Partner Help Centre that sets out five guiding principles and details expectations for how generative AI can be applied in regard to data use, creative output, talent & performance, and ethics & representation

Due to Netflix's prominent position in the global streaming market, the guidelines are expected to be highly influential not only on direct suppliers but also on the wider production ecosystem as media owners look to ensure that their content library remains compliant for resale. The Netflix Post Technology Alliance initiated in 2018 created such an effect when the streamer set out requirements for cameras, editorial, colour grading and IMF encoding.

Source: IABM, Netflix

Media Streamer Statement on Gen AI for Content Production

We expect all production partners to share any intended use of gen AI with their Netflix contact, especially as new tools continue to emerge with different capabilities and risks.

Most low-risk use cases that follow the guiding principles below are unlikely to require legal review. However, if the output includes final deliverables, talent likeness, personal data, or third-party IP, written approval will be required before you proceed.

Netflix
Gen AI For Content Production Guidelines
(August 2025)



MediaTech Investment

Generative AI model attribution vital to avoid copyright infringement

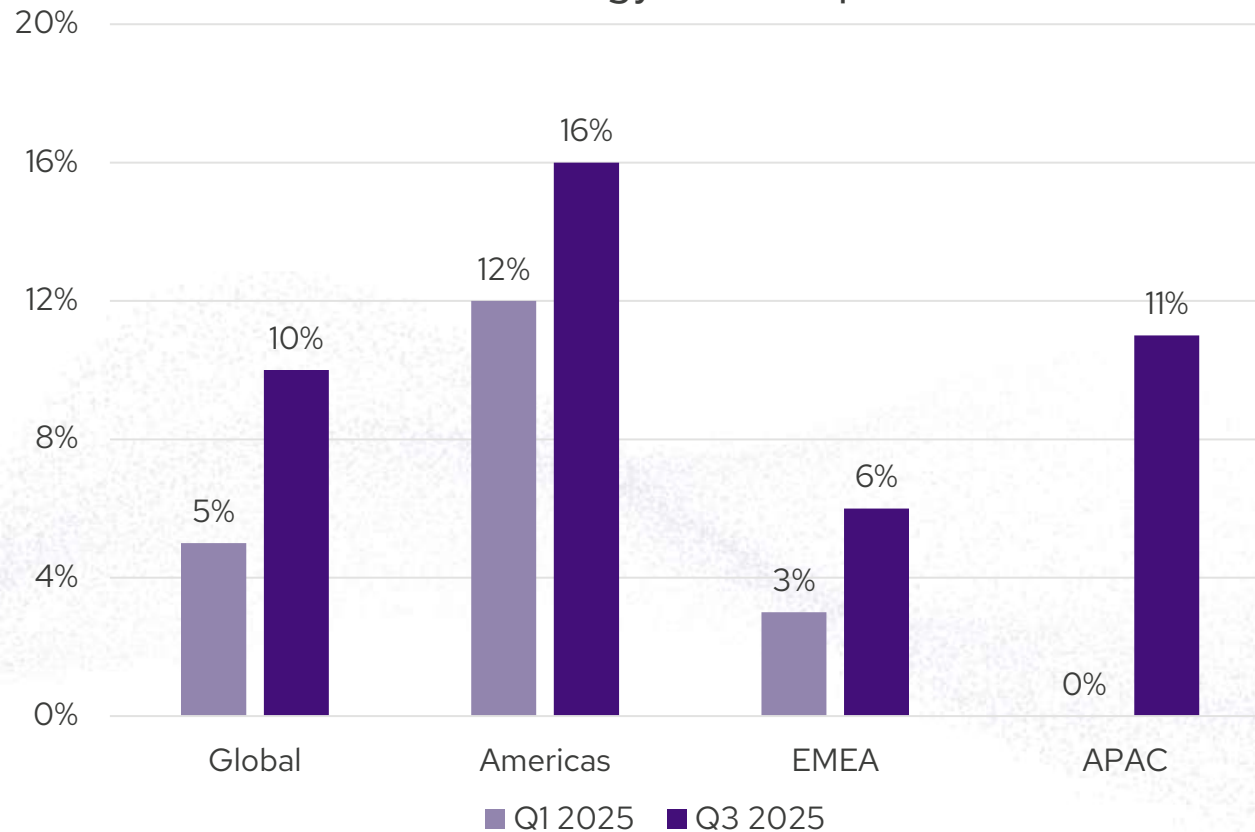


As existing tools in the video content supply chain integrate 1st party and 3rd party features that leverage generative AI, transparency with attribution and terms of use are paramount. To avoid alienating a customer base of creatives and artists, Adobe has assured users that it does not use assets created in its suite of apps to train its own generative AI models. Adobe highlights that licensed and copyright free assets have been used to train its own 1st party generative AI models to assure users that they will be safe for commercial use without infringing others' copyright. However, users have also requested the integration of Adobe applications with third party generative AI models to streamline their workflows. Adobe has issued commitments to customers that they will not train Firefly Gen AI models on customer content and will never assume ownership of work created in their applications and services. Therefore 3rd parties have had to agree to Adobe's terms when integrating their models for native use within the Adobe ecosystem, this can provide additional assurance to creators that want to utilise generative AI whilst retaining ownership of their intellectual property.

3 rd Party Model Integrations with Adobe	Firefly Boards	Firefly Boards Video Model	Text to Image	Text to Video	Image to Video
Veo by Google	✓			✓	✓
Imagen by Google	✓		✓		
GPT image generation model by OpenAI	✓		✓		
Flux 1.1 and Flux.1 Kontext by Blackforest Labs	✓		✓		
Pika video generator by Pika Labs		✓			
Ideogram by Ideogram	✓				
Luma Ray2 by Luma		✓			
Runway Gen-4 by Runway	✓				

Source: Adobe

Provenance & Authenticity in organizations' technology roadmaps



Source: IABM

Survey Update

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

Combating Misinformation

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

Consumer Electronics



Samsung Electronics announced native support for C2PA compliant Content Credentials in the new S25 smartphone range at the brand's Unpacked event in February 2025. Metadata labels will be tagged to AI-generated and AI-altered images produced on the handsets. The brand's endorsement for Content Credentials is significant in developing an installed base of compatible consumer electronics and driving consumer awareness as currently the largest manufacturer of smartphones worldwide. IDC attributed the brand with the leading market share of global smartphone volume (19.7%) in Q2 2025.

Professional B2B Products



Sony's new flagship XDCam, PXW-Z300, aimed at electronic news gathering is the first professional video camera that can embed digital signatures into recorded video. Announced in July 2025, the camera will provide a platform for Sony to introduce C2PA compliant video authentication technology to professional video production at the point of acquisition. The feature will allow broadcasters and news organizations to provide a guarantee of authenticity of the origin of their video footage to their audiences. However, the feature may not be available immediately at the time of the product's launch or in all countries and regions.

Source: Samsung, Sony

MediaTech supplier statement on product announcement

It's getting tougher and tougher to tell what's real from what's fake online. People are genuinely starting to wonder if they can trust what they see. That's why it's more important than ever for news and media organisations to deliver authentic, trustworthy content – their reputation really depends on it.

Hitomi Hamaba
Head of Product & Marketing Lead at Sony
(July 2025)



Provenance at the edge

In August 2025, Fastly enhanced its Image Optimizer with native C2PA support, shifting from a performance-focused approach that stripped metadata to one that embeds provenance, ensuring both optimized delivery and content authenticity.

By integrating C2PA signing at the edge delivery layer, Fastly ensures provenance is added without slowing down performance, setting a precedent for other infrastructure providers.

This move is part of a broader industry trend of building infrastructure that ensures audience trust, as generative AI makes identifying manipulated or synthetic content increasingly difficult. C2PA standards are now being extended beyond images to video delivery, including both on-demand and live streaming contexts. This enables real-time authentication for broadcast news, entertainment, and social media platforms.

MediaTech supplier statement on product update announcement

Our C2PA integration represents more than just a feature addition—it's part of a broader commitment to building infrastructure that supports a more trustworthy internet. By implementing C2PA at the edge, we're helping to normalize content provenance as a standard part of media delivery.

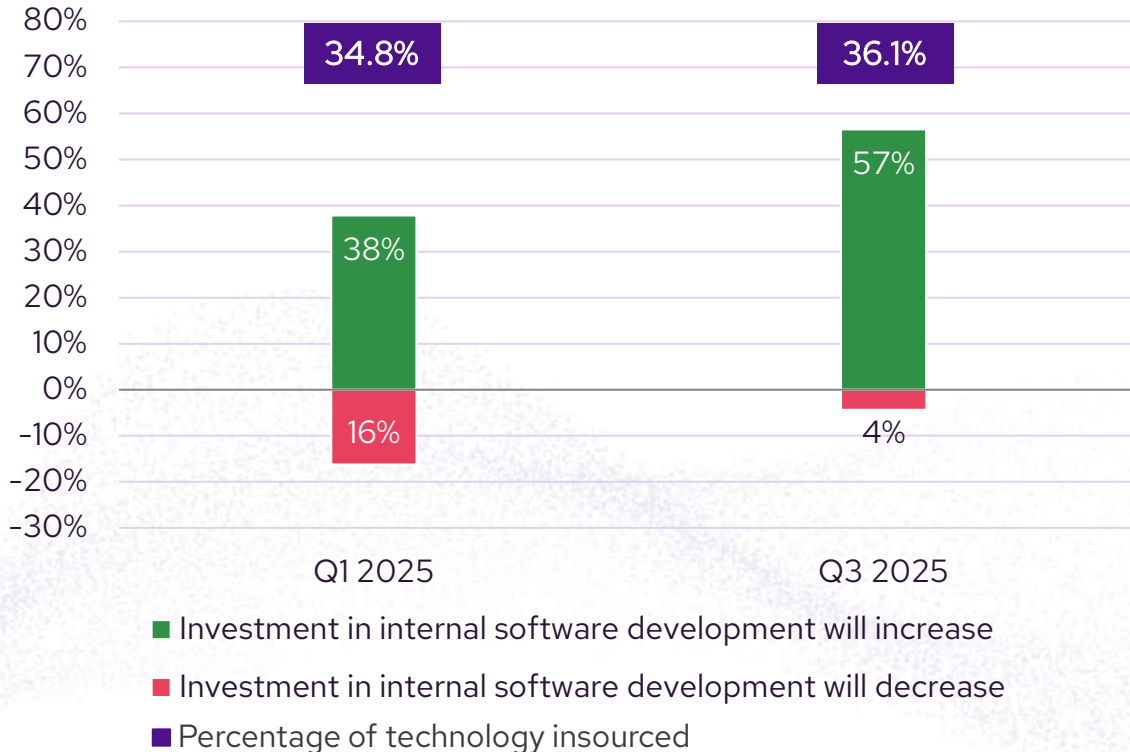
James Sherry, Staff Product Manager at Fastly
(August 2025)



MediaTech Investment

Insourcing is expected to accelerate in the year ahead

Insourcing outlook



Q. How will your investment in internal software development change over the next year?
(media/production companies, Q1 2025 n=37, Q3 2025 n=23)

Source: IABM MediaTech Industry Tracker



Premier League

The Premier League will bring all international content production and distribution in-house starting from the 2026-2027 season, ending a 20-year partnership with IMG.

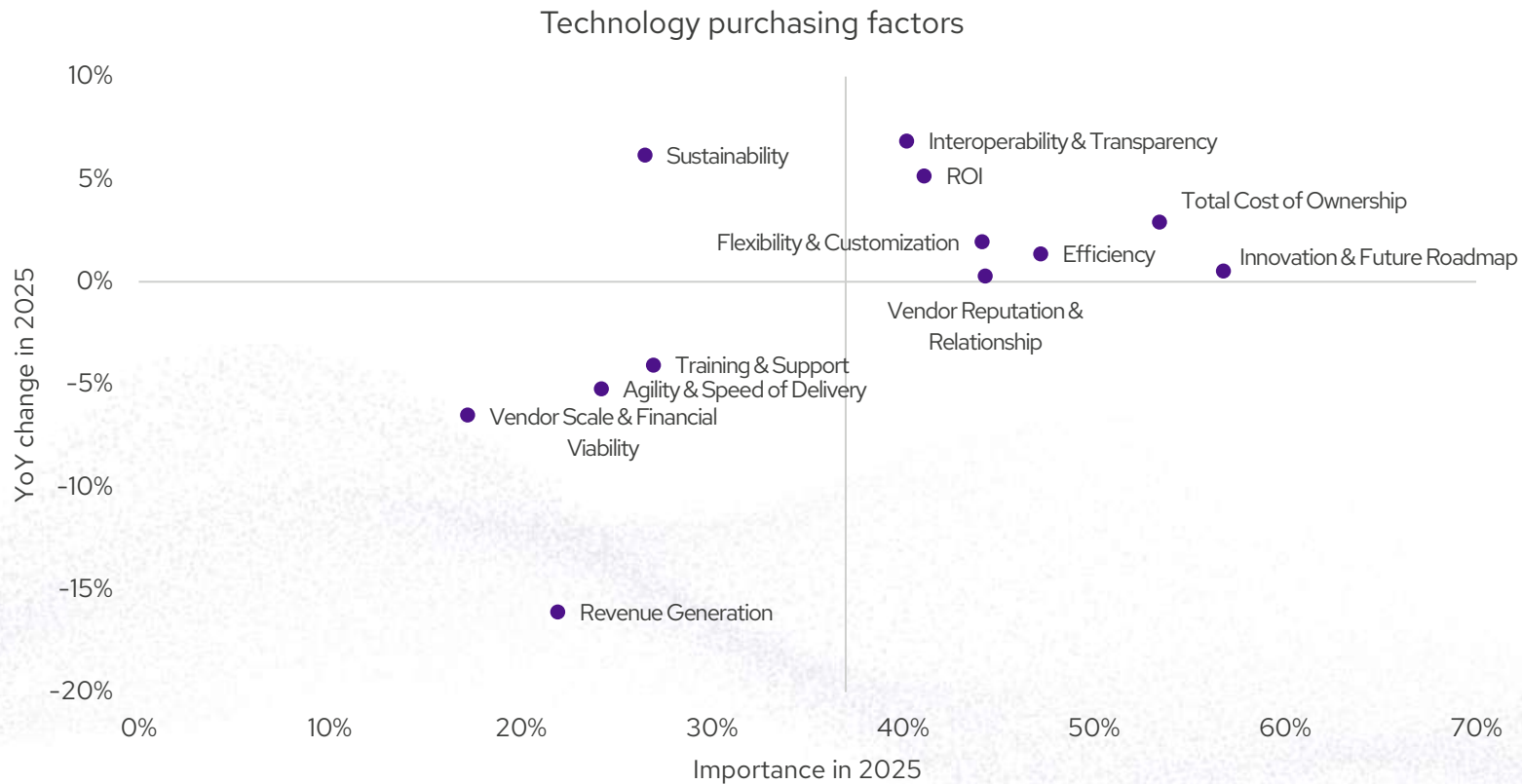


Netflix

Netflix has developed its proprietary first-party ad tech platform Netflix Ads Suite, which provides Netflix greater control over its advertising ecosystem. Initially launched in April 2025 in North America, the platform has been rolled out to all Netflix's ad markets by July 2025.

MediaTech Investment

MediaTech purchasing decisions are increasingly driven by interoperability



Purchasing factors

Interoperability, ROI, and sustainability are gaining importance as media technology purchasing factors

Q. In general, besides cost and technical specification, what are the most important factors that influence your decision to purchase media technology products and services? (media technology buyers, n=88)

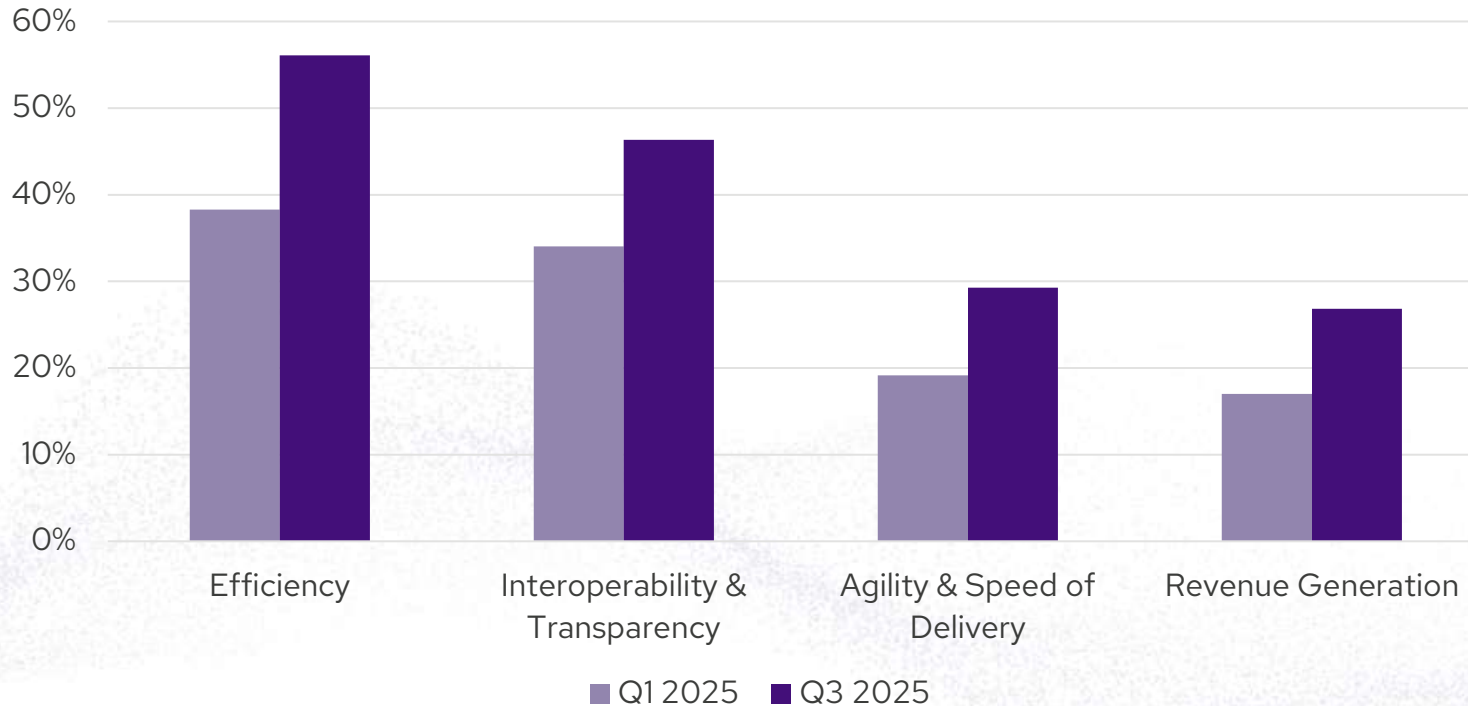
Source: IABM MediaTech Industry Tracker

MediaTech Investment

Innovation, total cost of ownership and efficiency keep driving investment decisions



Technology Purchasing Factors



Q. In general, besides cost and technical specification, what are the most important factors that influence your decision to purchase media technology products and services? (media technology buyers, Q1 n=47, Q3 2025 n=41)

Source: IABM MediaTech Industry Tracker

Purchasing factors

Focus shifts toward efficiency and interoperability in Q3 2025. Efficiency becomes the main investment driver.

The importance of ROI continues growing.

Purchasing decisions are increasingly driven by sustainability.

MediaTech Investment

Interoperability becomes increasingly important for media tech investment



Purchasing preference, 2025



- To purchase a complete system from an end-to-end solution provider that provides most or all the products we need
- To evaluate multiple suppliers and create "best of breed" solution

Q. When purchasing media technology products, which do you generally prefer?
(media technology buyers, n=88)

In June 2025, Sinclair and its subsidiary ONE Media Technologies in partnership with Pearl.TV hosted an end-to-end interoperability event bringing together over 30 manufacturers, developers, and vendors from across the broadcast technology sector, at Sinclair's headquarters in Hunt Valley, Maryland. The event focused on testing interoperability for devices and systems intended for NextGen TV (ATSC 3.0) and included more than 100 scheduled tests examining key features such as digital rights management (DRM), dynamic ad insertion, enhanced audio/video, failover recovery, and the Broadcast-Enabled Streaming Television channel. This industry-wide collaboration represents a critical milestone in advancing the ATSC 3.0 rollout in the US, with major broadcast markets expected to complete the transition by February 2028 and remaining markets following by February 2030.

The most common interoperability issues identified include device compatibility, standards conformance, signal transport, and digital rights management (DRM) challenges.

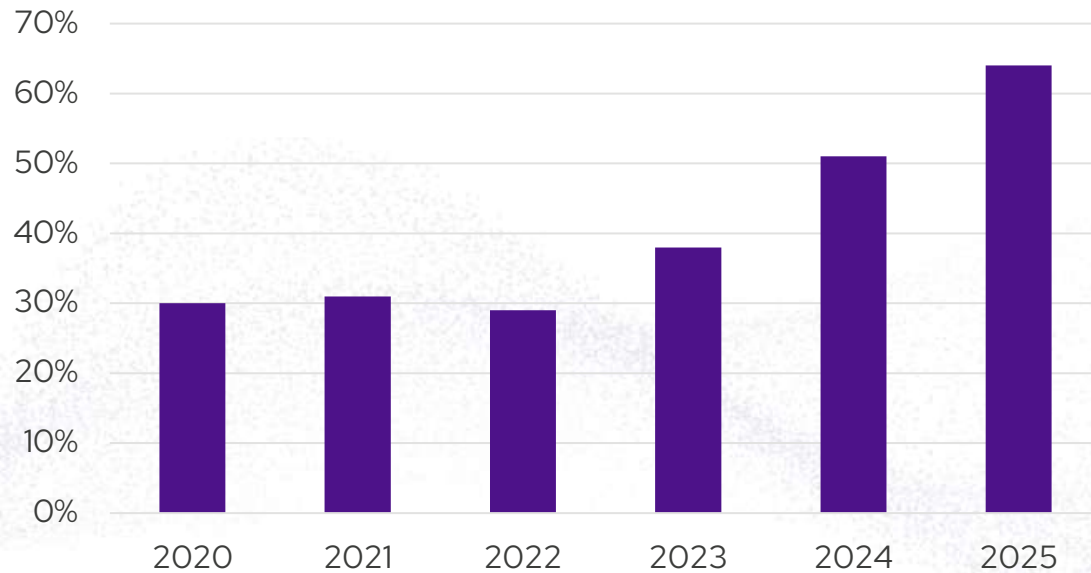
Source: IABM MediaTech Industry Tracker, Sinclair

MediaTech Investment

AI surge is driving increased focus on sustainability in media tech purchasing

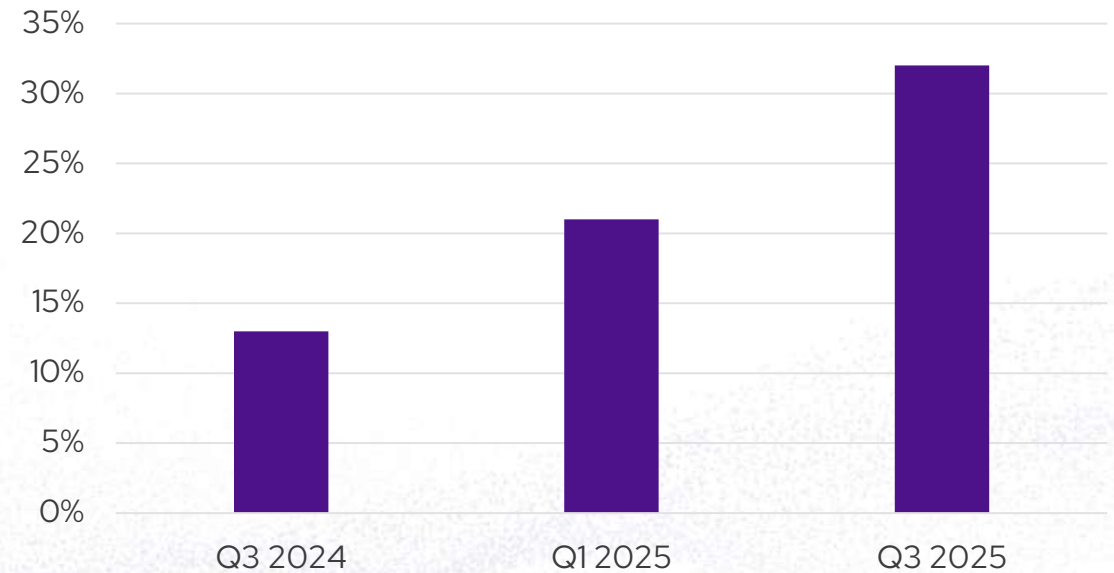


AI in media companies' technology roadmaps



Q. What are the most important trends in your organization's technology roadmap? (media technology buyers, sample size = 48 to 113 per year)

Sustainability as media technology purchasing factor



Q. In general, besides cost and technical specification, what are the most important factors that influence your decision to purchase media technology products and services? (media technology buyers, sample size = 24 to 47 per wave)

Source: IABM MediaTech Industry Tracker

MediaTech Business Models

Key drivers of change in 2025 and beyond

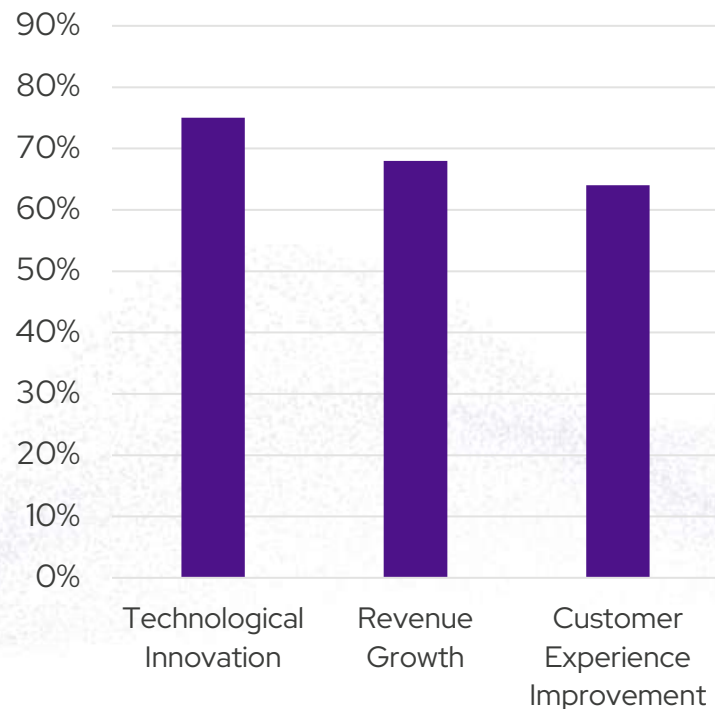
18 April 2026

MediaTech Business Models

Technology Innovation is Driving Business Transformation

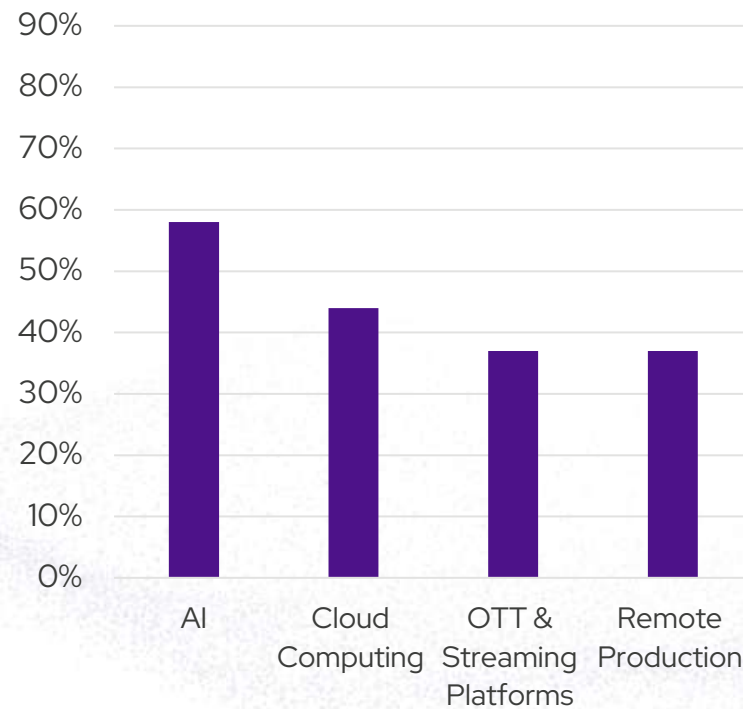


Key Drivers of Business Transformation (Top 3)



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

Critical Transformation Technologies (Top 3)



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



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

Business Transformation

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

Survey Methodology

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

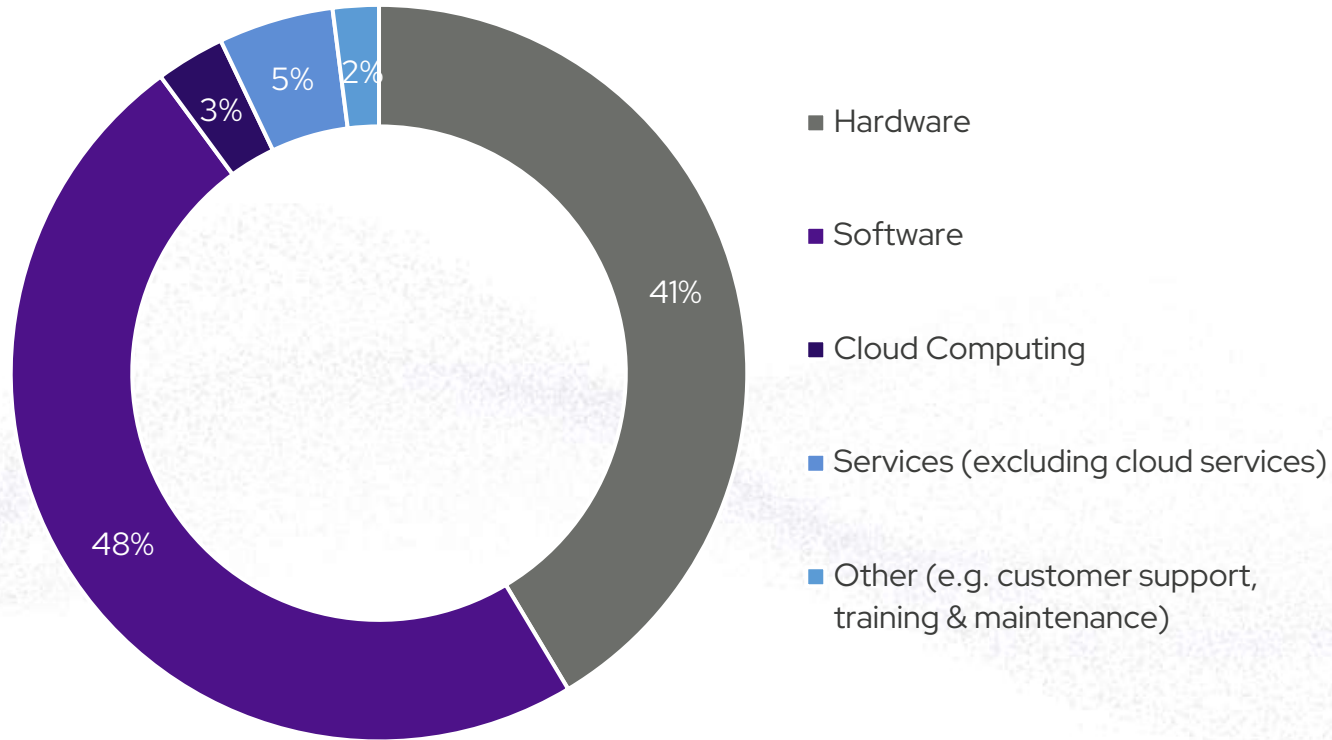
Source: IABM Business Transformation Megatrend Report

MediaTech Business Models

Opportunity for software catalysed by Media eXchange Layer initiative



Supply-side primary revenue sources 2025



Innovation in Software-Defined Applications for Media Production

The launch of the Media eXchange Layer initiative is expected to catalyze the introduction of a new generation of interoperable and open-source software for media production that can be hosted on generic IT compute resources, in the cloud or on-premise (as per the Dynamic Media Facility reference architecture).

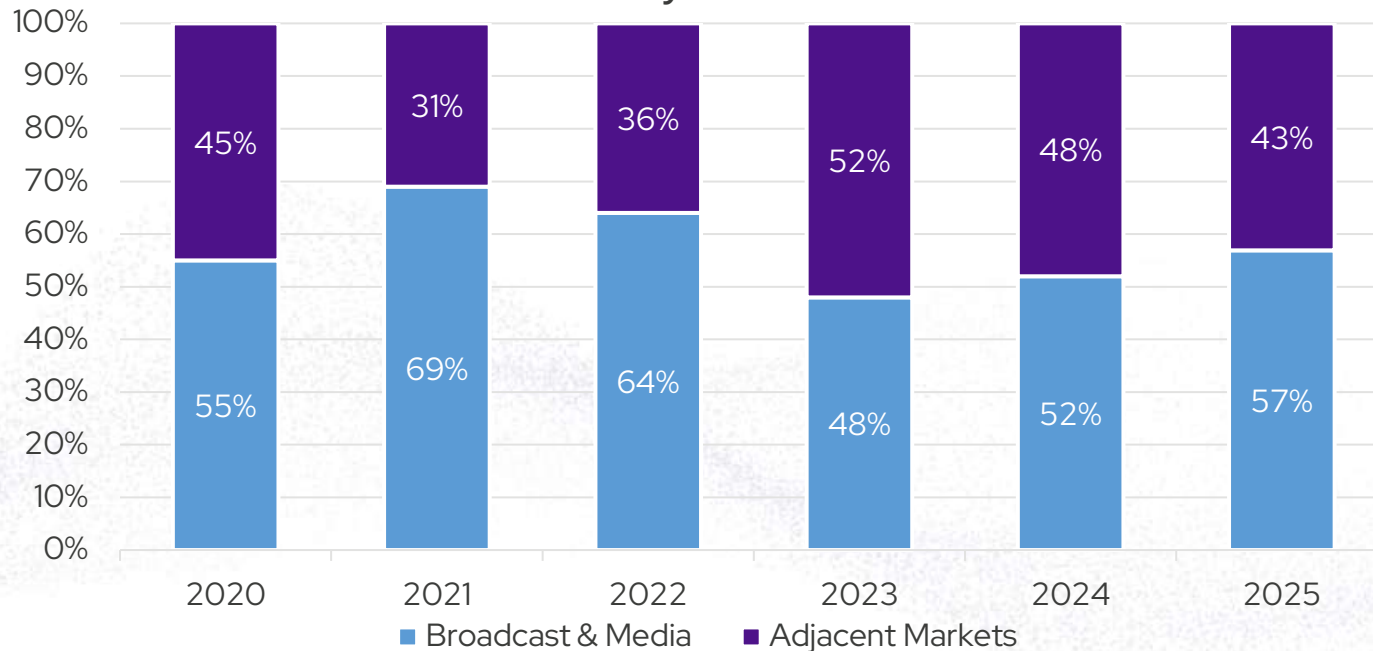
Source: IABM MediaTech Industry Tracker

MediaTech Business Models

Broadcast & media business improves while parallel markets remain important



Average % share of MediaTech supplier revenues by source



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

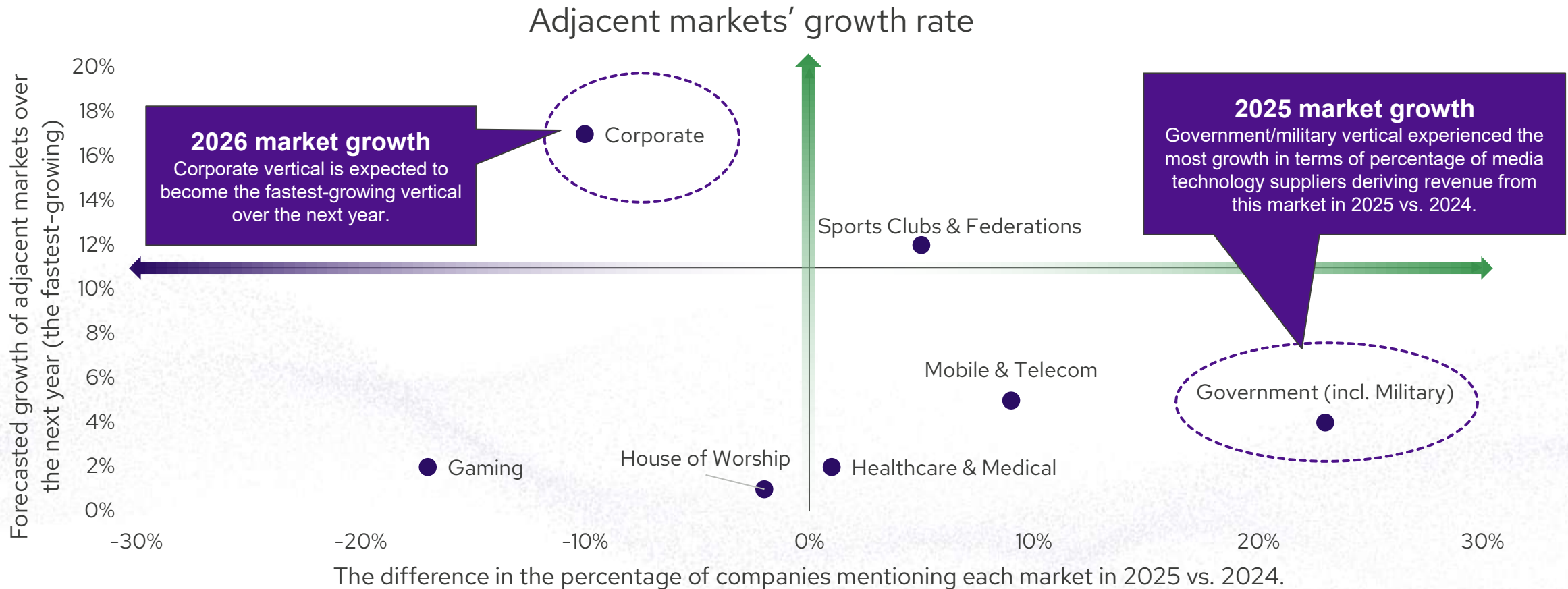
Parallel Markets
Parallel markets, such as corporate, government, and education represent new revenue generation opportunities, while the increase in share of broadcast & media revenue share reflects improving market health.

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

Source: IABM MediaTech Industry Tracker

Corporate is projected to outpace other verticals

Government/military received the biggest increase in mentions YoY



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

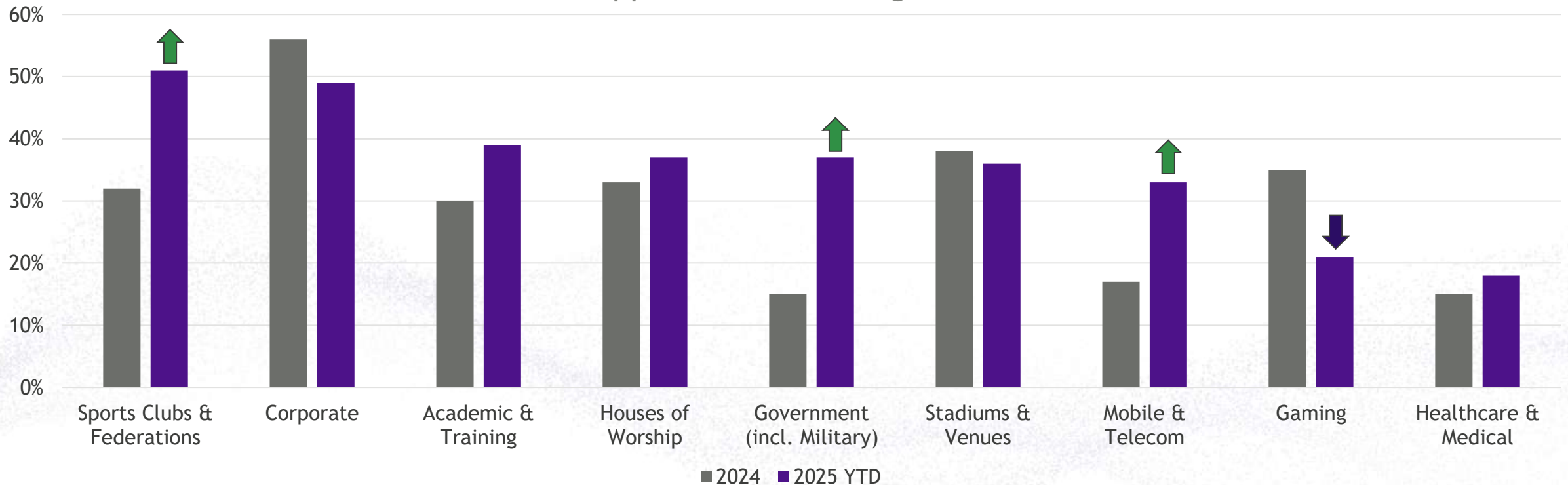
Source: IABM, MediaTech Industry Tracker Survey

MediaTech Convergence

Sports clubs & federations rise to become the most widely served segment



Suppliers' revenue segments

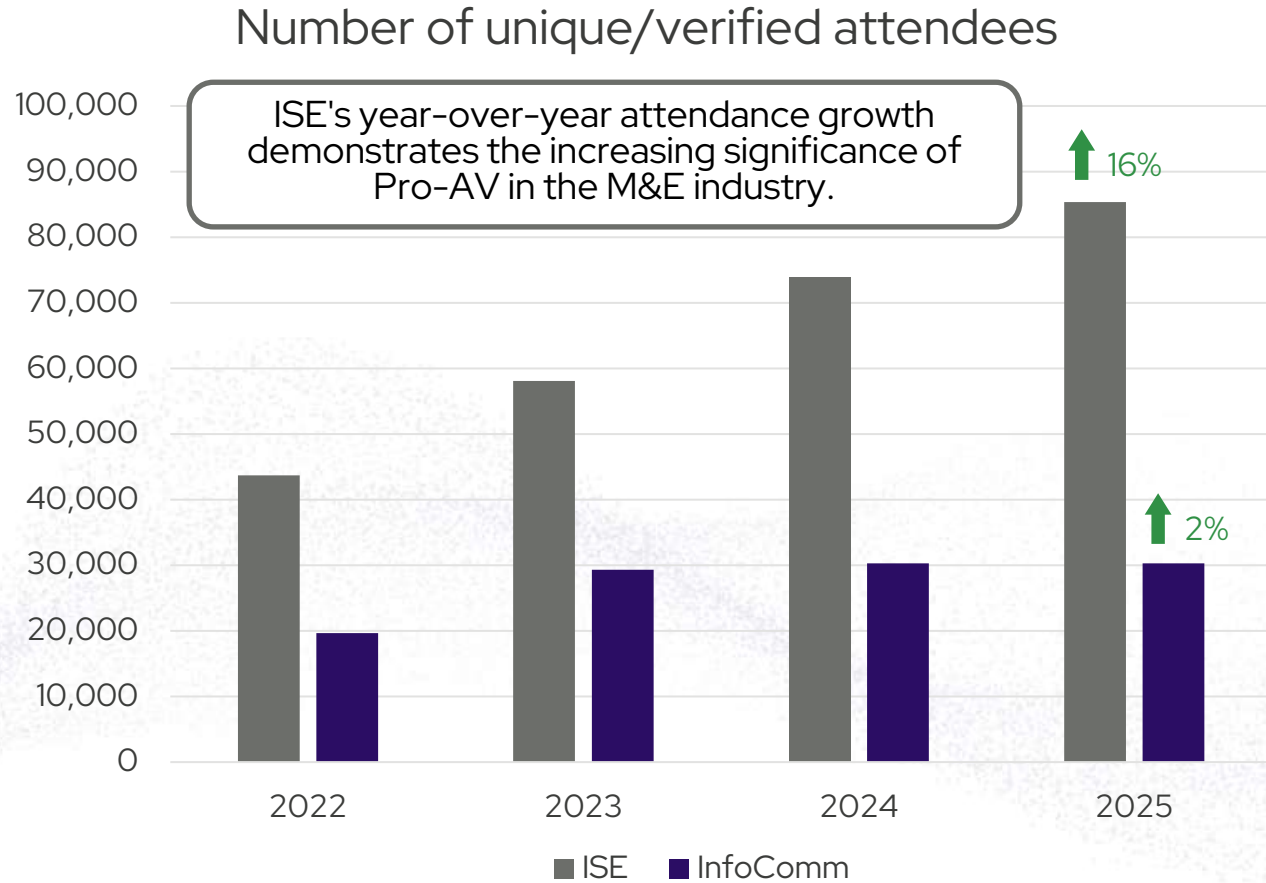


Q. What are your organization's revenue segments? (2024 n=81, 2025 n=67)

Source: IABM MediaTech Industry Tracker

MediaTech Business Models

InfoComm did not reach ISE's rate of annual growth



Industry Convergence

Leading trade events that have served the Pro AV market are providing a site for partnerships and business development as broadcast, professional AV, and IT technologies converge.

Modest Growth at InfoComm

InfoComm was not able to achieve the rate of growth registered by Integrated Systems Europe earlier in the year. A variety of factors contributed to this, however, as a US based show, attendance at InfoComm from international visitors and exhibitors was detrimentally impacted by the uncertainty surrounding international trade with the US.

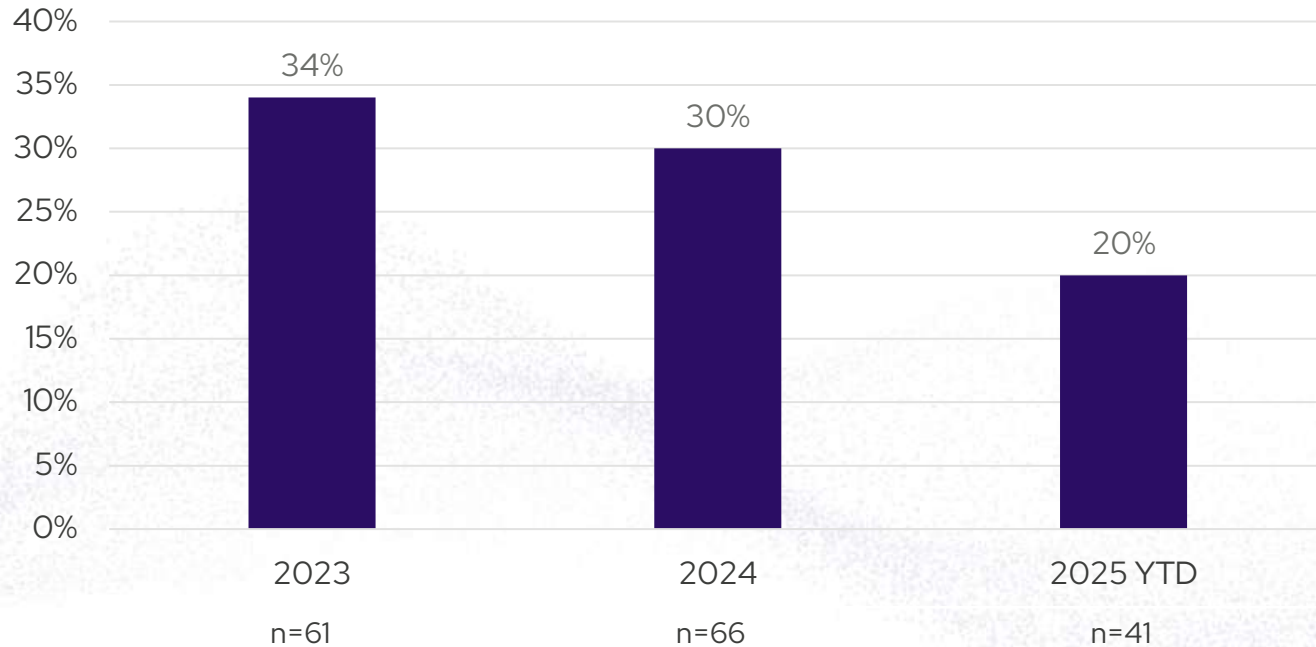
Source: IABM, ISE, AVIXA

MediaTech Resilience

Importance of sustainability as an investment driver continues to decline YoY



Importance of Sustainability as an investment driver



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

Source: IABM MediaTech Industry Tracker

Sustainability

According to IABM’s latest survey data, sustainability is prioritized as a driver of investment by a falling number of companies even though its importance has notably increased in Q3 2025.

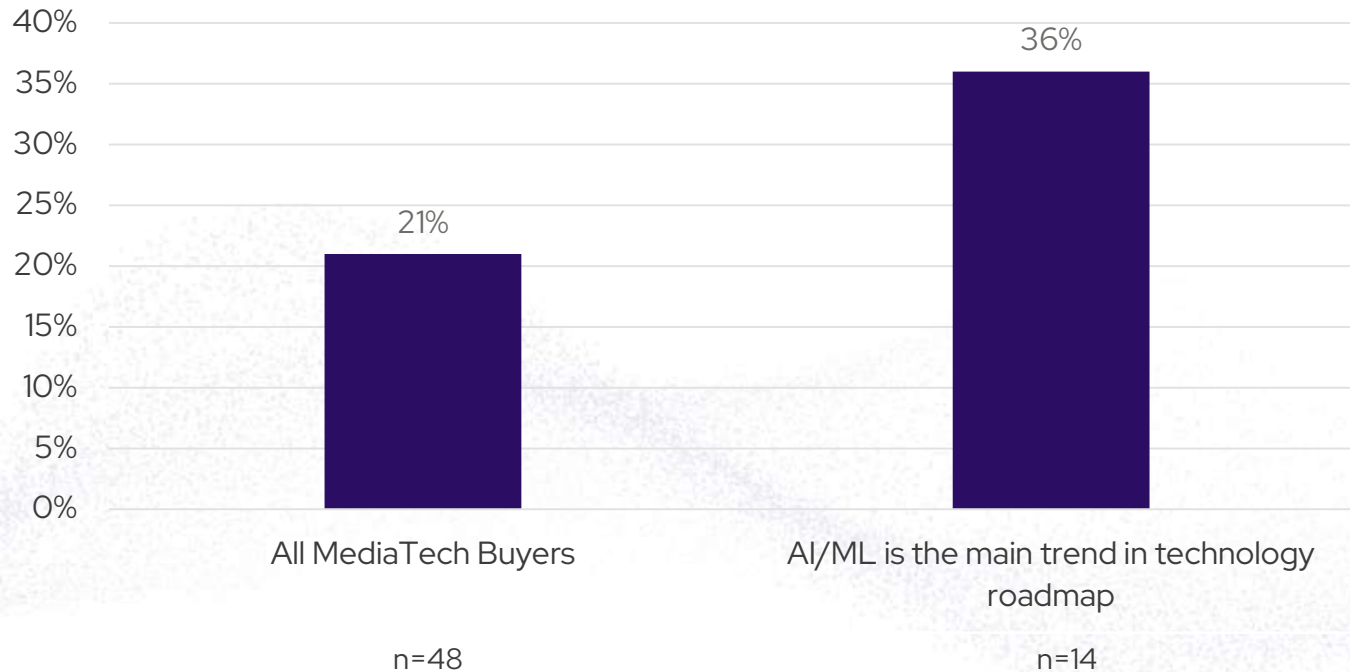
Technology end-users are prioritizing Total Cost of Ownership (TCO) and efficiency over sustainability when investing in new technology and tend to consider sustainability as a “nice to have” by-product of efficiency, as the benefits associated with environmental sustainability are well aligned with their financials.

MediaTech Resilience

Companies focusing on AI tend to prioritize sustainability in buying decisions



Importance of Sustainability as an investment driver
(2025 YTD)



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

Source: IABM MediaTech Industry Tracker

Sustainability

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

The emergence of generative AI over the past year has enabled media businesses to automate more workflows and improve their energy efficiency. Simultaneously, they are more aware of the rapidly rising computing needs required by AI, making end-users more interested in "compensating" their energy demand and carbon footprint by investing in more sustainable solutions.