



TechTracker™

Tracking technology adoption and market dynamics

IABM Business Intelligence Unit

18 April 2026

About this Report

An overview of the contents

- *This report is based on IABM Industry Tracker survey conducted by IABM as well as a wide range of expert interviews covering media technology vendors and end-user organizations. It aims to provide a deep dive into the adoption of different emerging and maturing technologies – IP, Cloud, AI/ML, Remote Production and OTT & Streaming Platforms in the media and entertainment industry.*
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 - **IP**
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- *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.*

TechTracker™ report methodology



This report was prepared using a hybrid research approach

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

Primary Research

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

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

Secondary Research

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

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

Trackers research family

Our tracking research spans four types of trackers

- IABM tracking research comprises the three types of trackers listed below. This report presents the findings of the TechTracker™, analyzing trends in 5 tech sectors in MediaTech.

ChainTracker™

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

GeoTracker™

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

TechTracker™

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



IABM Research Streams

The structure of the Business Intelligence Service



State of MediaTech

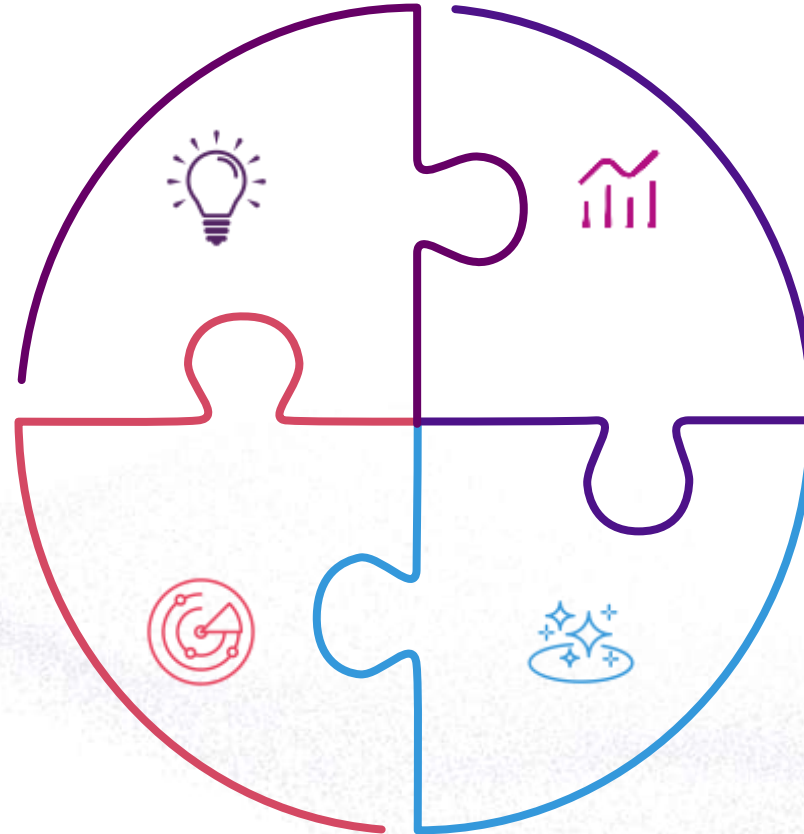
Strategic analysis of MediaTech sector

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



Snap Insights

Key learnings from the research

18 April 2026

Executive summary

Key findings of the research



- The importance of AI & ML has grown steadily throughout the year – 33% of respondents selected AI & ML as the main priority in their organizations’ technology roadmaps in Q3 2025 compared to 26% in Q1 2025. Provenance and authenticity has emerged as a new growing category of MediaTech investment.
- IP ranked as the second most important area of investment (14%) following behind AI & ML (29%). Technology vendors and buyers now share a widespread understanding of the technology’s benefits. The adoption and deployment of IP networked infrastructure in media facilities is however at varying levels of maturity depending on the organization.
- The majority share of MediaTech buyers have adopted cloud services (66%). Currently, hybrid cloud architectures are prevalent and perceived as the most advantageous approach to cloud integration for the majority of end-users. Dynamic hybrid cloud workflows utilize both specialized and generic resources allowing media businesses to build agile media technology stacks on-premises or in the cloud that can be quickly repurposed for different use cases. This approach is gaining popularity as media organizations aim to optimize all of their technology investments.
- OTT content delivery is now a mature technology, with 71% of media and production companies having already adopted it and a low likelihood of new adoption in the next three years, while we are also witnessing a year-on-year decline of OTT’s importance in the industry’s technology roadmaps, further indicating trend towards maturity.
- Remote production has been adopted by 52% of media organizations and still has significant potential for investment, with nearly one-fifth of media companies in IABM’s MediaTech Industry Tacker indicating that they plan to adopt this technology in the next three years. This investment is driven by the need for efficiency, as remote production allows broadcast teams to work from centralized locations—dramatically reducing travel, lodging, and equipment costs while maintaining broadcast-quality content delivery.

Source: IABM

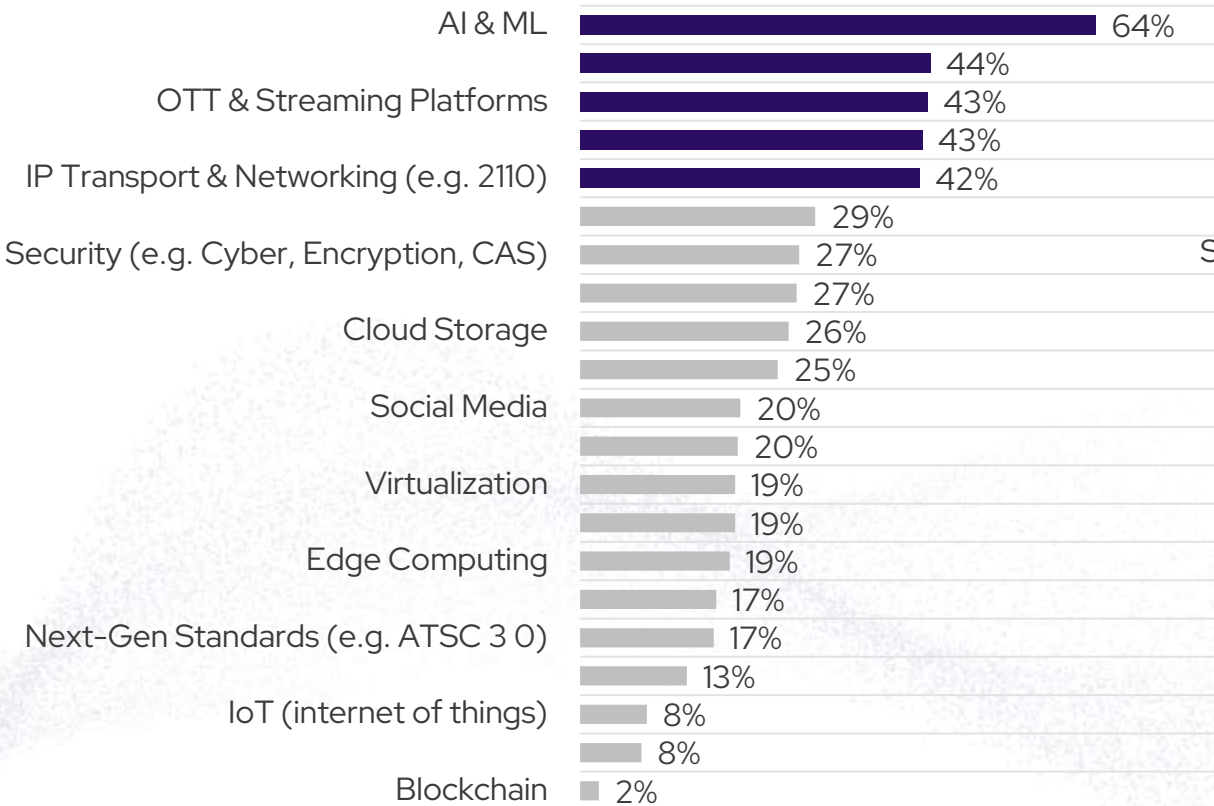
GEP Insight

MediaTech Buyer
in an IABM Business
Intelligence interview

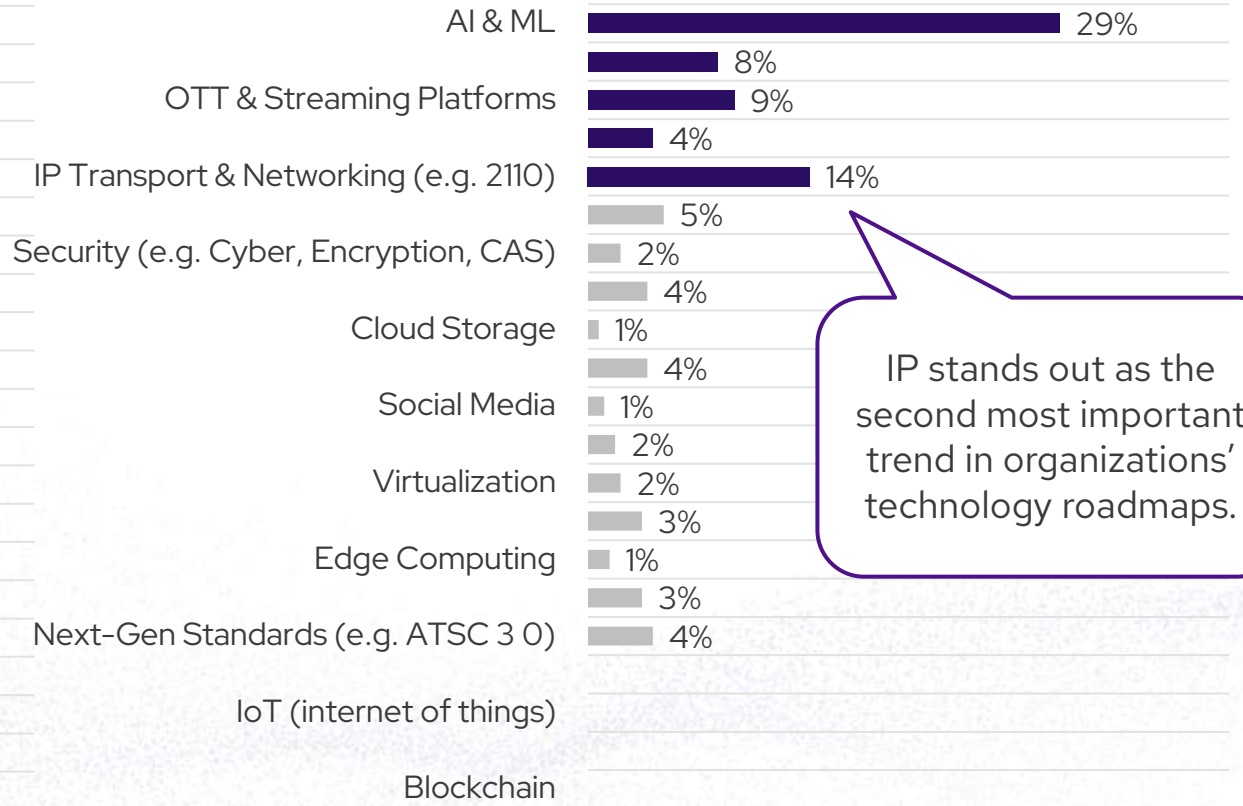
We have mature business in terms of cloud. We are pretty far in our journey, but that approach is hybrid and it must make sense to move things to cloud. Having both businesses – linear and streaming – has helped us to understand cloud and how we can use it cost-effectively.

Multinational Media Company
North America
(October 2025)

Technology Roadmap Priorities



Main Priority



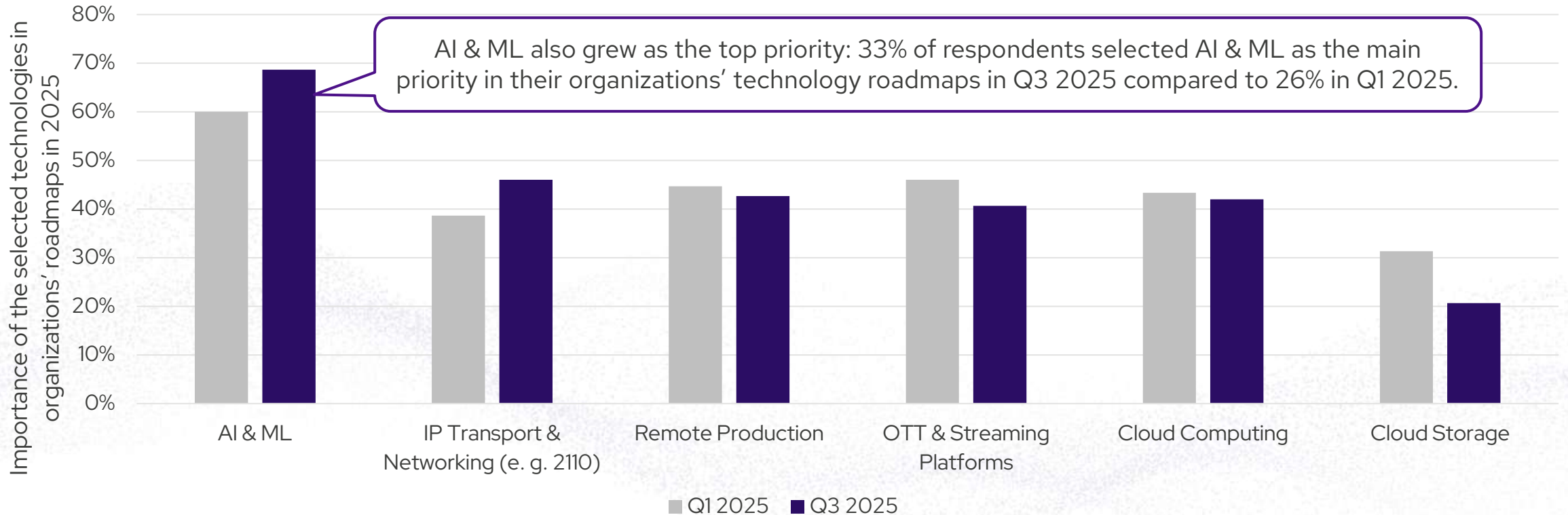
IP stands out as the second most important trend in organizations' technology roadmaps.

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

Q. Please choose the most important trend in your organization's technology roadmap (Single response) Base: All industry, 2025, n=296.

Source: IABM MediaTech Industry Tracker

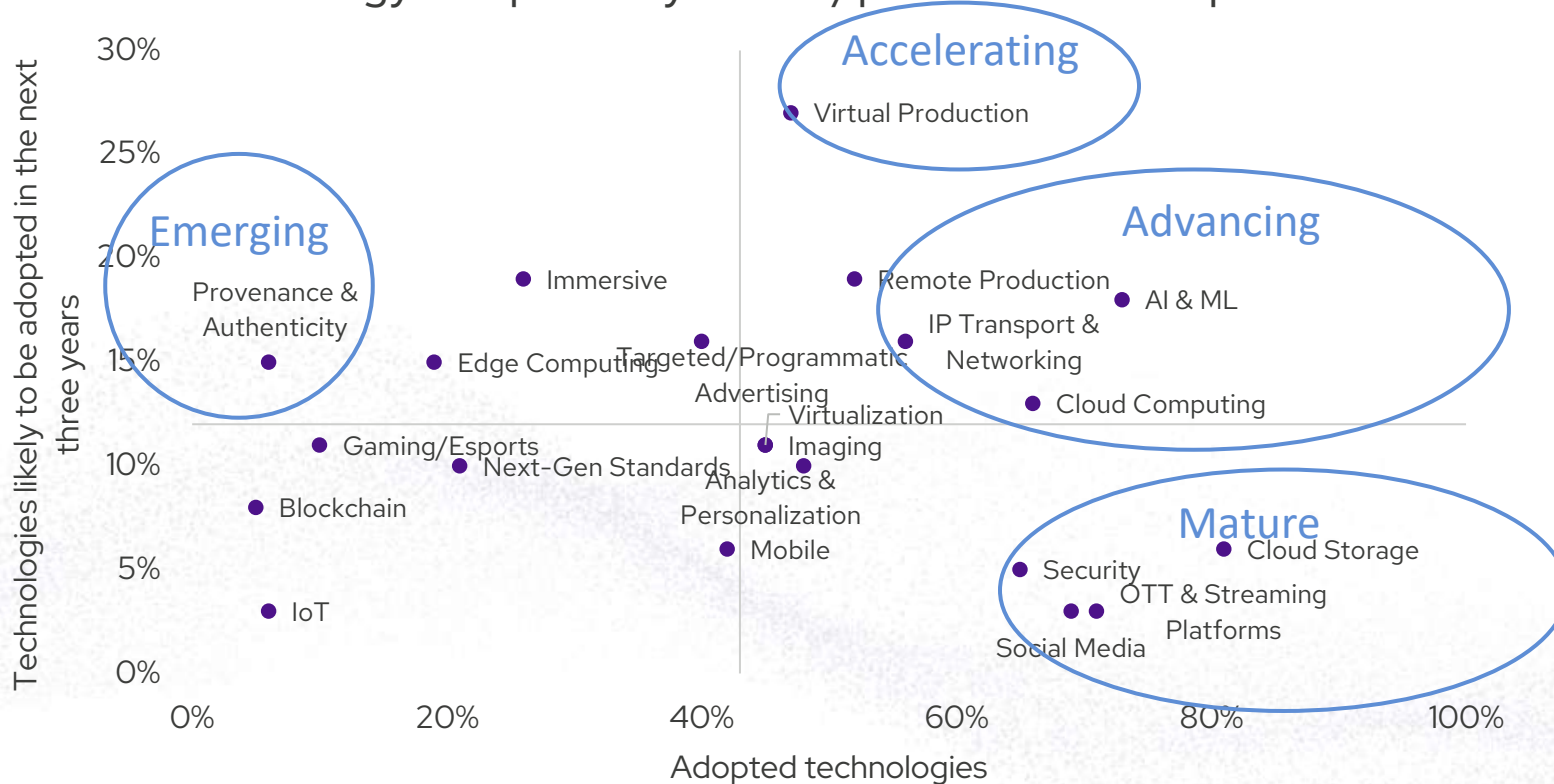
Technology Roadmap Priorities



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

Source: IABM MediaTech Industry Tracker

Technology adoption by media/production companies



Technology Adoption

This report primarily focuses on advancing technologies, which are widely adopted by media technology end users but are still in transitional phases with high likelihood for further adoption by a larger installed base in the next three years. OTT and streaming technology represents a mature market environment but has registered high importance as an area of investment as media technology vendors, service providers, and end-users innovate to create greater cost efficiencies while also improving quality of service.

Q. Which of the following technologies has your organization already adopted? / Which of these technologies is your organization likely to adopt in the next three years? Period: 2025 Base: Media/production companies (n=62)

Source: IABM MediaTech Industry Tracker

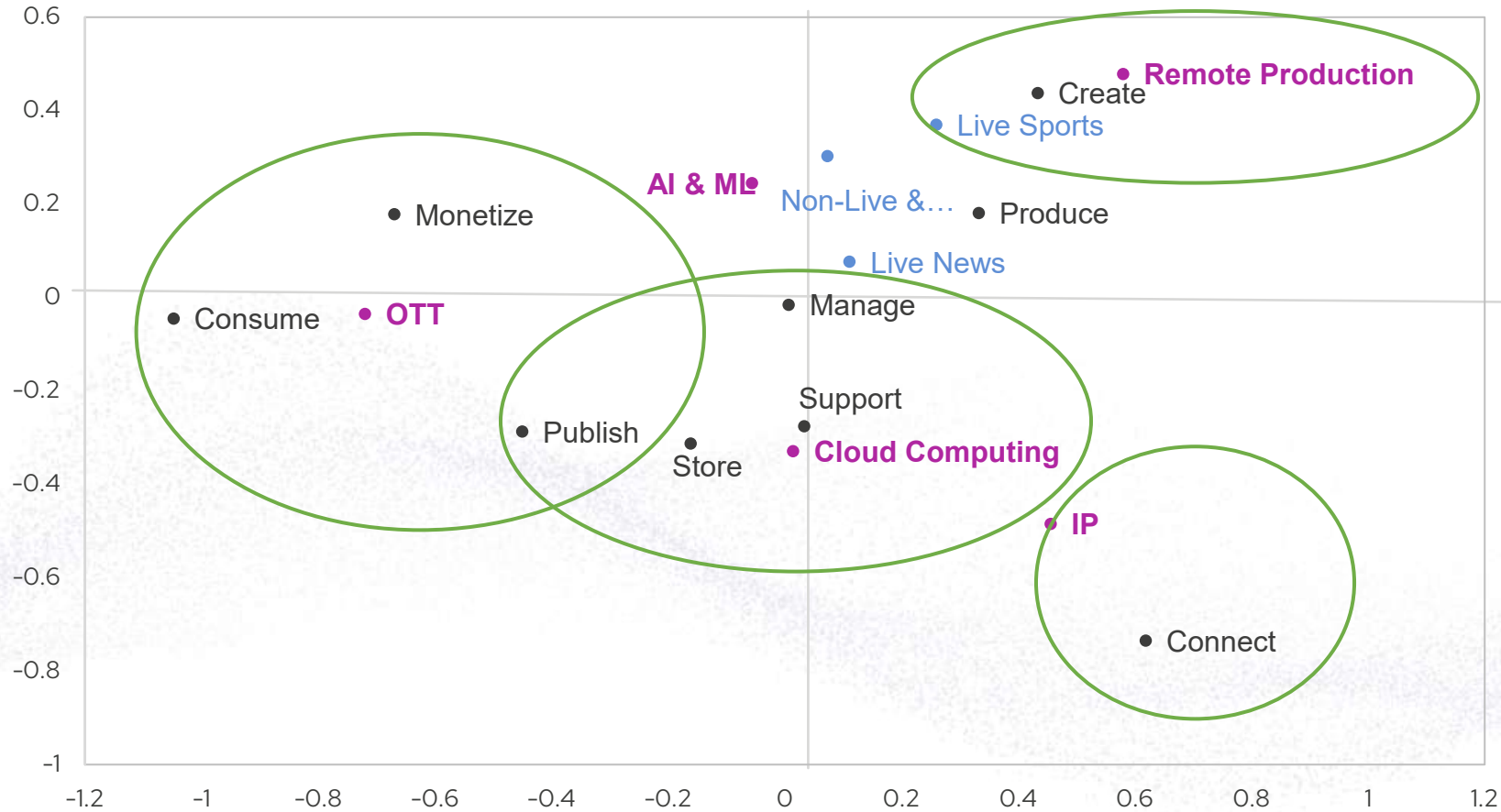
Drivers of technology adoption

Technologies covered in this report	Trends in organizations' technology roadmaps (IABM survey)	Efficiency	Innovation Capabilities	Flexibility & Scalability	Collaborative Opportunities	Production Quality	Revenue Opportunities	Consumer Demand & Experiences
AI	AI & ML	27%	48%	0%	3%	6%	9%	6%
	Analytics & Personalization	11%	11%	6%	0%	0%	39%	33%
Cloud	Cloud Computing	31%	12%	50%	4%	0%	4%	0%
	Cloud Storage	28%	3%	45%	14%	0%	10%	0%
	Virtualization	0%	0%	24%	5%	0%	0%	0%
IP	IP Transport & Networking	33%	11%	33%	0%	11%	4%	0%
Remote Production	Remote Production	61%	13%	4%	4%	9%	4%	0%
OTT	OTT & Streaming Platforms	13%	13%	4%	4%	13%	17%	38%

Q. Please select the most important driver of adoption for each of the following technologies. (Base: technology buyers, n= 18 to 33. Period: 2025)

Source: IABM MediaTech Industry Tracker

Technological Drivers of Investment (Correspondence analysis)

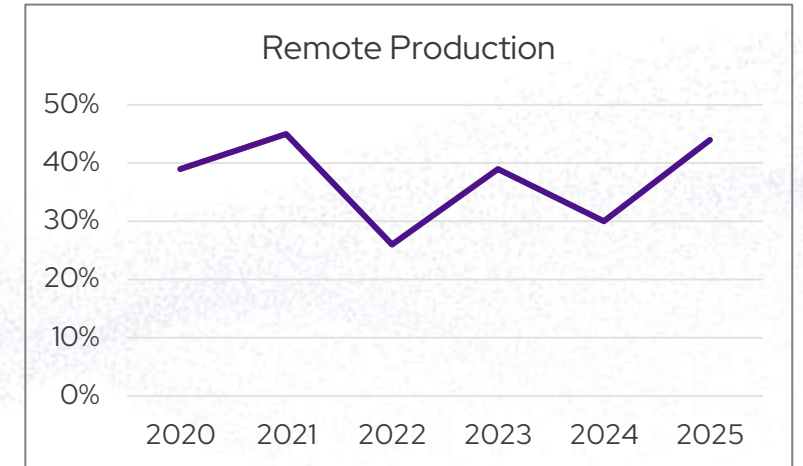
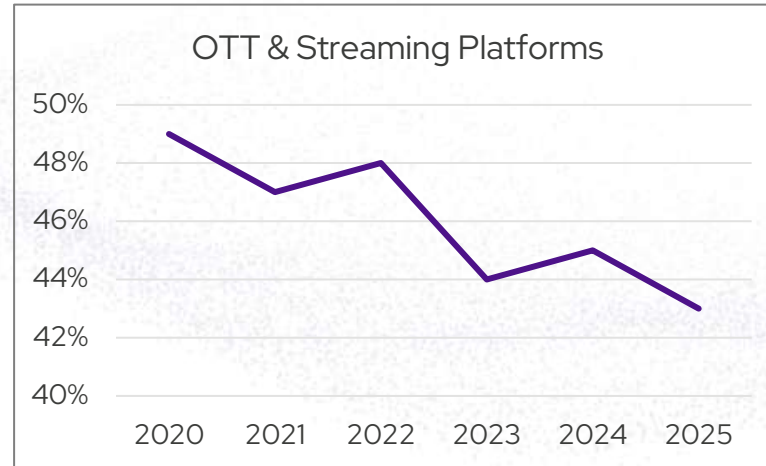
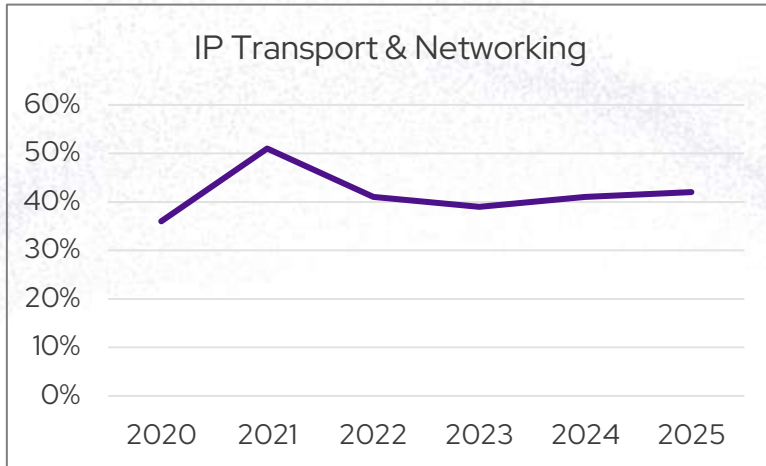
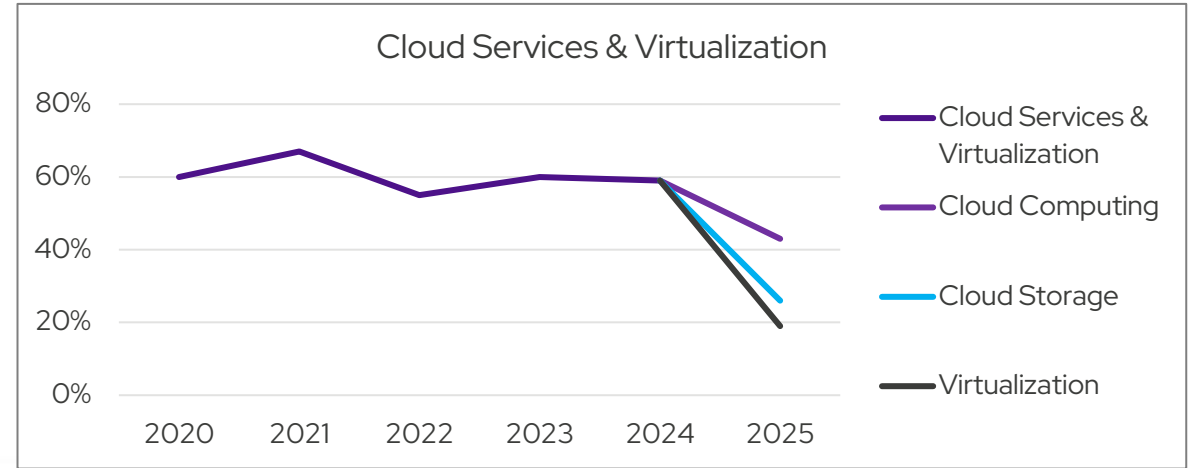
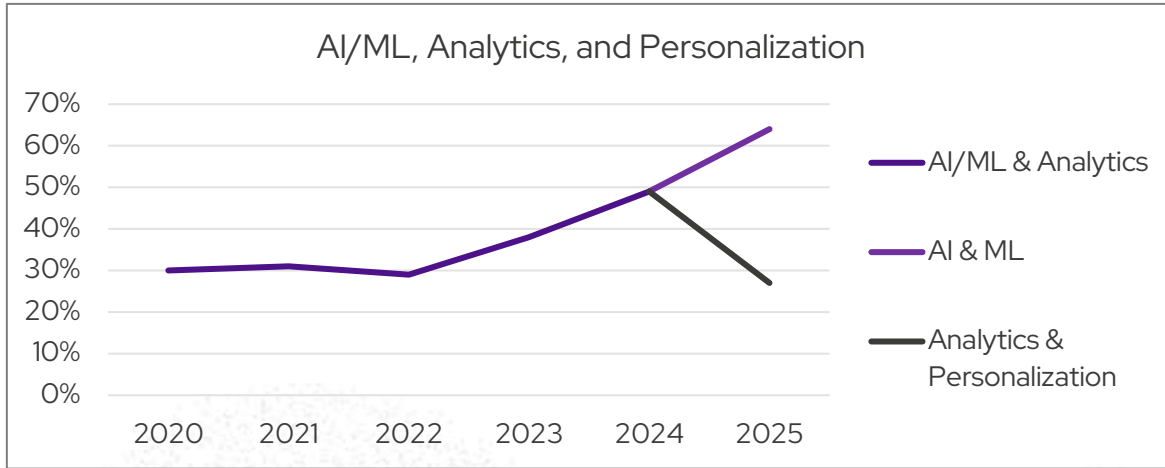


- Content supply chain segments and sectors

Drivers of Investment

Remote production is driving investment in live sports content creation. IP technology enables connectivity in cloud environments, particularly for live content. OTT & streaming platforms primarily drive investment in live content delivery and consumption (Publish, Monetize and Consume). Cloud computing fuels investment in content management, publishing, storage and support, while AI & ML technologies underpin the entire media supply chain, driving investment across all content sectors.

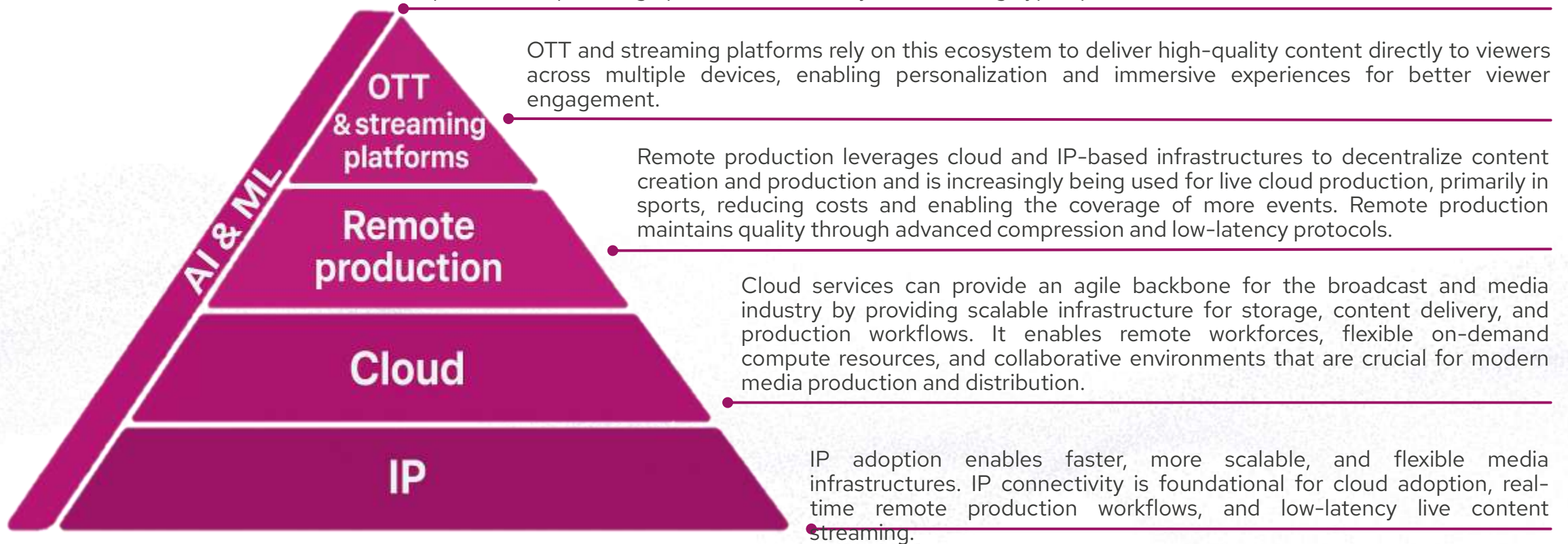
Source: IABM MediaTech Industry Tracker



Source: IABM MediaTech Industry Tracker

Q: What are the most important trends in your organization's technology roadmap? (All that apply). Base: All industry (n = 160 to 372)

AI & ML became the most important trend in technology roadmaps of media technology vendors, service providers, media and production companies, affecting every step of the media supply chain. AI & ML are advancing IP, cloud, remote production, and OTT technologies' capabilities for MediaTech by automating processes, optimizing operational efficiency, and enabling hyper-personalization.



Source: IABM

TechAnalysis - IP

Deep dive into recent trends and the adoption of IP

18 April 2026

TechAnalysis – IP

IP adoption moves into phases of greater maturity



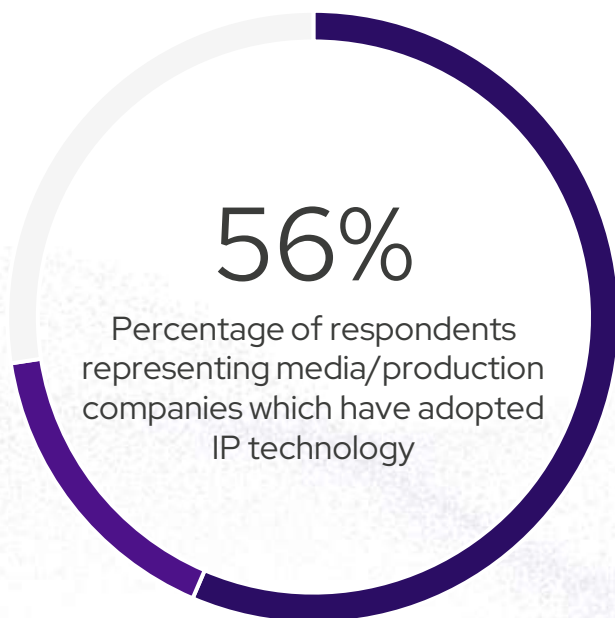
- When IABM MediaTech Industry Tracker participants were asked to name their single most important area of investment, IP ranked as the second most commonly cited answer (14%) only following behind AI & ML (29%).
- Technology vendors and buyers now share a widespread understanding of the technology's benefits. This status was further evidenced in 2025 as both SMPTE ST 2110 and JPEG-XS were each respectively recognized with Emmy Awards for Engineering, Science & Technology by the Academy of Television Arts & Sciences.
- The adoption and deployment of IP networked infrastructure in media facilities is however at varying levels of maturity depending on the organization.
 - Early adopters that embraced IP at an early stage are building upon initial investments, scaling outwards across facilities, whilst refinements and upgrades for existing investments are also taking place.
 - A late majority of companies are investing in "islands" of IP, where gateways are used to bridge between IP capable resources and legacy SDI investments.
 - Some organizations are still using only baseband workflows. The most common reasons for an organization to have not yet invested in IP migration is cost, lack of skills or resource.
- Integrators are playing an essential part in developing the market opportunity for vendors with IP products as their expertise is frequently needed to roll out IP deployments to medium and small-scale organizations that do not have the engineering, networking, or development capabilities in house.
- Control, management, and orchestration tools are highly valued by operators to apply graphical user interfaces to different tasks on the network to enable more efficient and intuitive operation and configuration of networked resources.

Source: IABM

TechAnalysis – IP

IP is an advancing technology with significant likelihood to be adopted

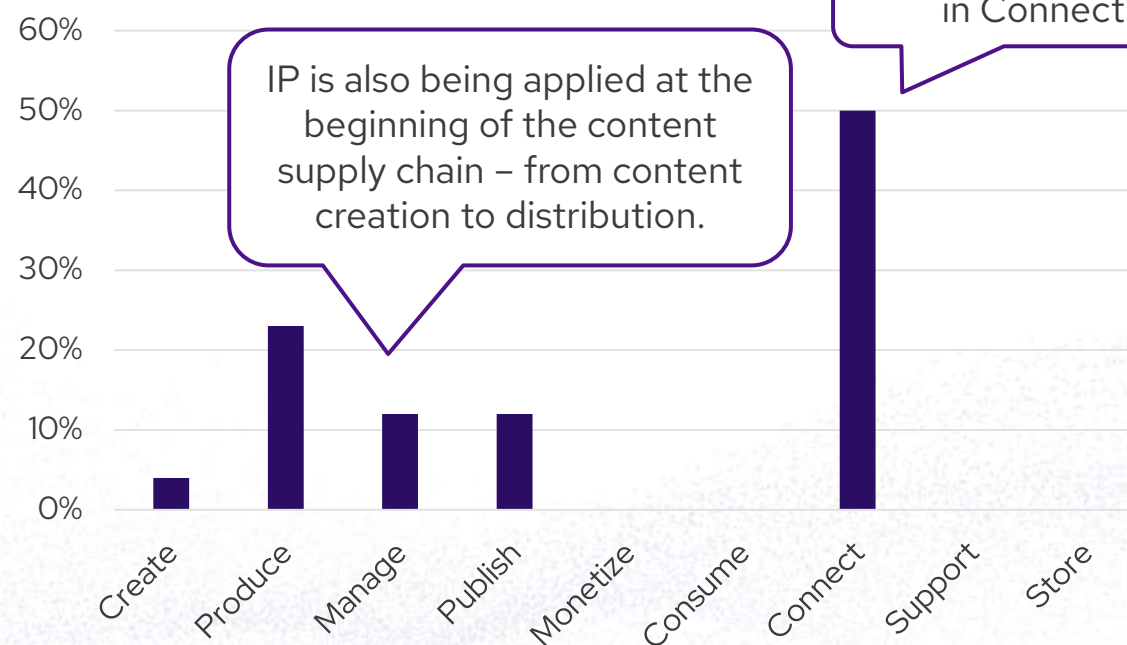
IP Transport & Networking



■ Have already adopted ■ Likely to adopt ■ Other

Q: Which of the following technologies has your organization already adopted? / Which of these technologies is your organization likely to adopt in the next three years? Period: 2025 Base: Media/production companies (n=62)

IP adoption across content supply chain (primary segment)



IP is also being applied at the beginning of the content supply chain – from content creation to distribution.

IP is primarily applied in Connect.

Q: In which of the following content supply chain segments have you adopted/are you most likely to adopt IP? Single response. Period: 2025 Base: have already adopted or are likely to adopt IP technology (n=26)

Source: IABM MediaTech Industry Tracker

TechAnalysis – IP

Vendors need to support multiple types of IP to provide flexibility

- In mature IP deployments, and large facilities, it is now common to see multiple different protocols in use that are applied according to their advantages in each specific use case. It is necessary to have gateways and video processing applications not only for SDI to IP conversion, but also to translate from one protocol to another when multiple types of IP are used in a workflow.
- Microservices have emerged as a method of choice for vendors to allow software appliances to be customised to meet the needs of end-users integrating different types of IP. To allow end-users the flexibility to process audio and video signals in the cloud or on general purpose IT servers, vendors that want to establish successful software defined production platforms need to consider supporting multiple different types of IP to ensure they can cater to a broad range of customers and applications.
- For product categories that rely on FPGA hardware, vendors are building modularity into their products to allow different capabilities to be configured based on I/O cards, blades, and licences to add support for different types of IP as required. This follows the trend in the market for end-users to want flexibility and customisation, rather than feel like they are paying for features that they won't use or always having to plan for peak usage.
- Vendors with a commercial interest in the adoption of their own proprietary protocol are also adapting to support greater interoperability, rather than trying to promote closed ecosystems, due to the prevalence of mixed IP environments. In September 2025, Audinate announced expanded interoperability for Dante Controller to support open standards in its platform by enabling ST 2110-30 and AES67 to be managed directly in Dante Controller.

iamt



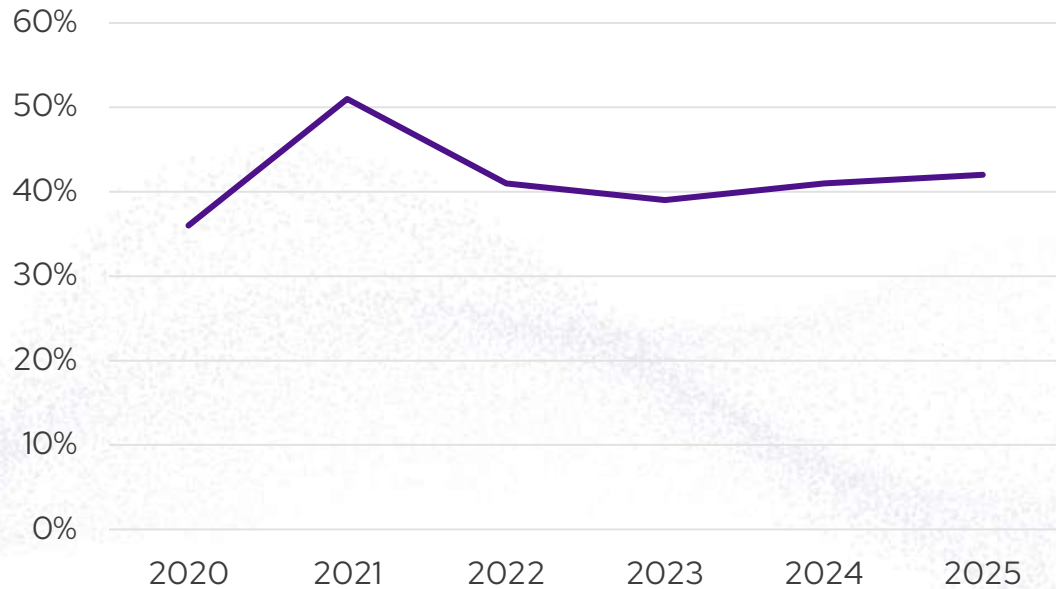
Source: IABM

TechAnalysis – IP

IP emerges as the second priority when a single technology is prioritized

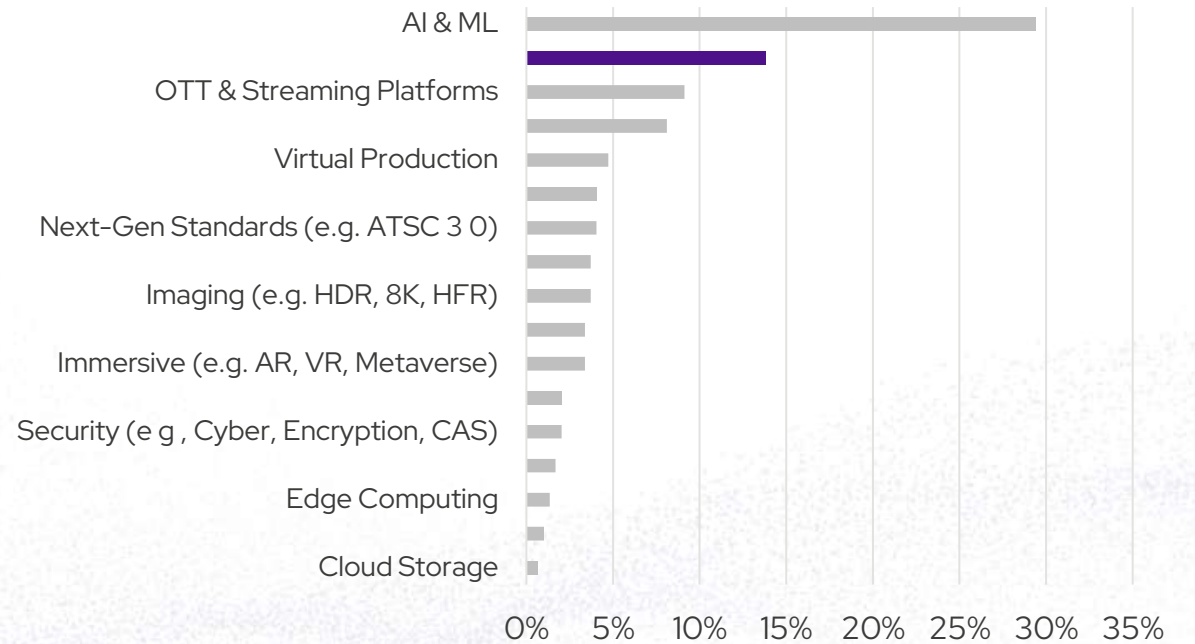


Importance of IP Transport & Networking in technology roadmaps



Q: What are the most important trends in your organization's technology roadmap? (All that apply)
Base: All industry

Most important priority in technology roadmaps



Q: Please choose the most important trend in your organization's technology roadmap? (Single response)
Base: All industry, 2025, n=296.

Source: IABM MediaTech Industry Tracker

TechAnalysis – IP

Monitoring and control critical to maturing IP market



- Industry feedback has consistently highlighted that an inhibitor to the adoption of IP has been the effect of abstracting the one-to-one relationship of physical input/output on hardware when moving signal flows onto networks where a single ethernet port accounts for the transport of many signals (dependent on bandwidth). This has fundamentally altered the user interface for engineers and operators where IP transport is deployed.
- As a result, network control and management tools are a key area of opportunity to support the successful deployment of IP workflows and create ease of use and efficiency for operators.
- Many vendors marketing these products refer to the convenience of having a “single plane of glass”, effectively a single dashboard view, to visualise and review the status of their network and resources. While multivendor interoperability is essential to an effective control product for the broadcast market, the control plane represents a strategically important part of the ecosystem for brands to own, not only for brand visibility, but also due to the growing role of data and analytics in production and facility management.
- The development of control plane products has also emerged as an opportunity for integrators to add value. An effective solution is also necessary for suppliers offering managed services to regulate usage.
- NDI 6.2 features a suite of new capabilities aimed at discoverability of devices, visibility and monitoring to aid control processes.

MediaTech Organization Press Release

One of the fundamental challenges facing our industry is managing devices and services across a fragmented infrastructure [...] Catena offers a new model based on open standards, community-driven development, and a pragmatic path to implementation.

Thomas Bause Mason
SMPTE
Director of Standards Development
(June 2025)

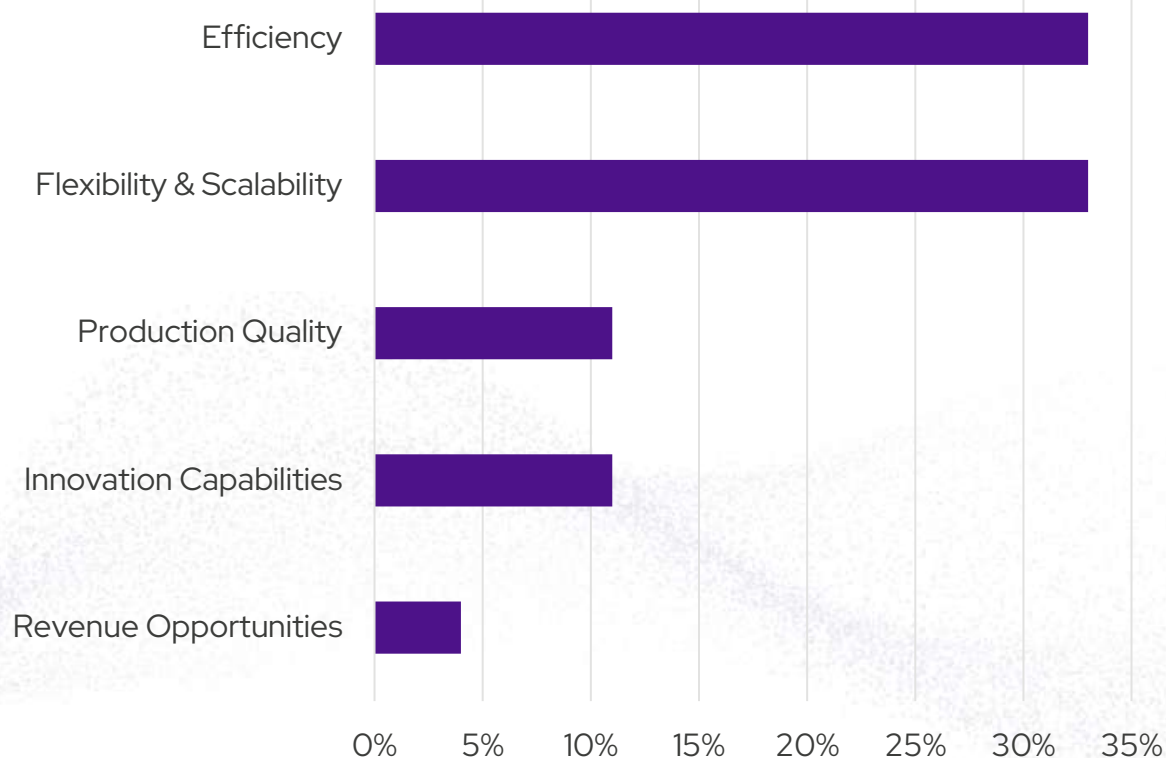
Source: IABM; SMPTE

TechAnalysis – IP

IP adoption is driven by efficiency, flexibility, and scalability



Drivers of IP adoption



Q: Please select the most important driver of adoption. Base: media/production companies that have already adopted or likely to adopt IP technology. Period:2025

Source: IABM MediaTech Industry Tracker

Drivers of adoption

Flexibility, scalability and efficiency are key drivers of IP adoption by media and production companies. Migration to IP-based infrastructure allows these organizations to reduce operational costs, improve workflow efficiency, and enable greater customization and scale across distribution platforms—benefits that traditional broadcast infrastructure struggles to match.

IP-based workflows give broadcast and media organizations the flexibility to operate from virtually any location. This supports robust remote production and collaboration, making it easier to scale resources and adapt to changing production needs without geographic constraints or heavy investments in dedicated equipment.

However, the transition from traditional baseband infrastructure to IP-based and software-defined workflows increases the risk surface. This makes organizations more vulnerable to cyber threats, which has led to an increased focus on securing infrastructure. As a result, there is a growing adoption of zero trust architecture and advanced security practices to safeguard broadcast operations in a cloud-connected and IP-centric environment.

TechAnalysis – IP

Compressed video over IP used in tier one live sports



- JPEG XS has been deemed an acceptable solution for live contribution over IP as it achieves visually lossless compression with a 10:1 ratio and <30millisecond delay through encode/decode. Producers of live content across different production genres are applying JPEG XS into workflows to leverage its benefits compared to transporting uncompressed signals over IP.
- End-users' adoption of JPEG XS has been enabled by the broad ecosystem of products supporting the protocol from a diverse range of vendors. To demonstrate the range of products available the utilise the technology IntoPIX published the document "JPEG in Action" profiling 51 unique products supporting JPEG XS from 31 different technology vendors. The ecosystem continues to grow.
- The range of applications that can benefit from visually lossless compression at high speed include live sports broadcasting, studio interconnects, KVM over IP systems, and camera-to-cloud workflows.
- In content distribution, the ability to add density to network nodes by adopting compression can allow for a higher density of channels to be hosted. However, due to the availability of other codecs with higher levels of compression available, JPEG XS will typically be chosen only where low latency is prioritized for live content.



Live Sports
Broadcasting



Camera to Cloud
Contribution



Remote Access
KVM over IP



Multi-Campus
Studio Connectivity



OTT Content
Distribution

Source: IABM; intoPIX – JPEG XS in Action

AV over IP Market

Reviewing go-to-market for IP products in Pro AV verticals

- Vendors need to review if the same go-to-market approach that has been used to sell their IP products to end-users in the broadcast vertical will translate effectively to end-users in other verticals like corporate, government, and education.
- The broader AV over IP market spans multiple enterprise verticals where many established incumbent brands create a challenging and mature competitive landscape to enter. While IABM's data evidences that best of breed systems are preferred by the majority of MediaTech buyers in all key global regions independently, a multivendor solution is not always the ideal for every end-user.
- For end-users that have limited in-house technical resources for audio and video, as is often the case in verticals like corporate, government, and education, single vendor solutions can be perceived as more advantageous due to ease of use, guaranteed compatibility, and efficient troubleshooting. Proprietary solutions hold greater influence in these markets outside of broadcast.
- While IPMX (Internet Protocol Media Experience) represents an opportunity for MediaTech vendors to adapt existing product developments for ST 2110 and NMOS to a suite of common standards and open specifications suitable for AV over IP, prospective customers from enterprise verticals may not perceive these qualities in the same way that end-users from the broadcast vertical do.

Crestron DM-NVX

An established leader in the Pro AV market with a significant installed base, Crestron uses a proprietary AV over IP solution, DM-NVX. It delivers 4K60 4:4:4 video with low latency over standard 1GbE networks and can transport video, audio, control and USB signals.

Q-SYS Q-LAN

Q-SYS solutions use the Q-LAN protocol suite for audio and video distribution with device discovery, synchronization, control and management. Q-LAN is proprietary but a verified partner program adds third parties. Q-SYS systems support Q-LAN and other protocols like Dante and AES67.

Extron NAV

The Extron NAV ecosystem is proprietary and uses Extron's PURE3 proprietary codec. It supports 4K60 4:4:4 video across both 1GbE and 10GbE networks. Embedded HDMI, flexible USB-C connectivity and AES67 audio over IP are also supported.

Source: IABM

TechAnalysis - Cloud

Deep dive into recent trends and the adoption of Cloud

18 April 2026

TechAnalysis – Cloud

Usage of cloud services optimized for operational efficiency



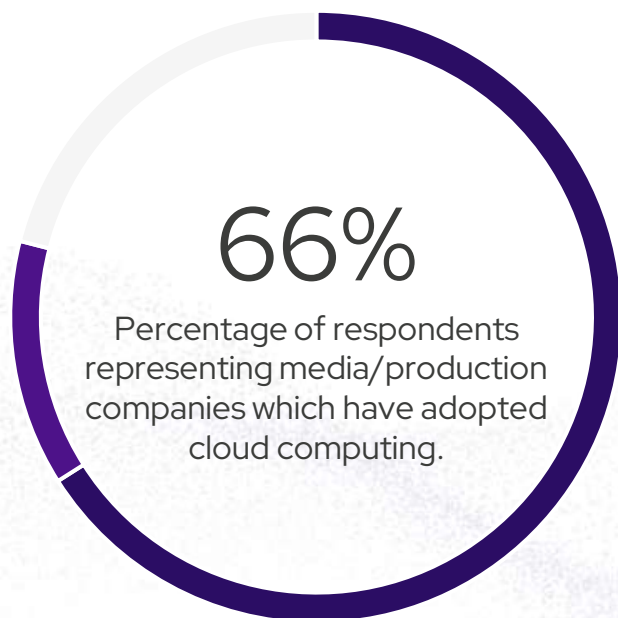
- The majority of media buyers have adopted cloud services (66%).
- As end-users gain experience with using cloud services in their media supply chains, applying oversight from financial operations (fins) is considered best practice to control and optimize flexible spend on cloud services.
- Media organizations that have experimented with cloud workflows for a number of years are able to leverage their data to build more refined production pipelines that utilize cloud services to their advantage. However, this is also leading to cloud repatriation where some resources that were virtualized and migrated to the cloud are being brought back to on-premises hardware or private datacenters where the frequency of usage or predictability of cost are of greater importance than the elasticity of being run as a service in the cloud.
- As a result, hybrid cloud architectures are prevalent and perceived as the most advantageous approach to cloud integration for the majority of end-users. Exceptions still arise, most often due to regional service availability, security requirements, or a top-down company directive.
- MediaTech vendors have needed to adapt their solutions to integrate seamlessly with both cloud and on-premises ground resources. This has led vendors to develop tools to be infrastructure agnostic, creating software-defined tools for production and processing.
- The EBU's Dynamic Media Facility Reference Architecture whitepaper presents a vision of how media organizations can restructure their technology stack to achieve more agile and efficient content creation and allocation of resources. Crucial to this is the link between application specific tools and generic compute. The Media eXchange Layer initiative addresses this challenge and has gained momentum since its foundation in April 2025, as the SDK provides a basis for vendors to develop interoperable and containerized software-defined appliances that run on shared memory compute.

Source: IABM

TechAnalysis – Cloud

Cloud's main application areas include Produce, Manage, Publish and Store

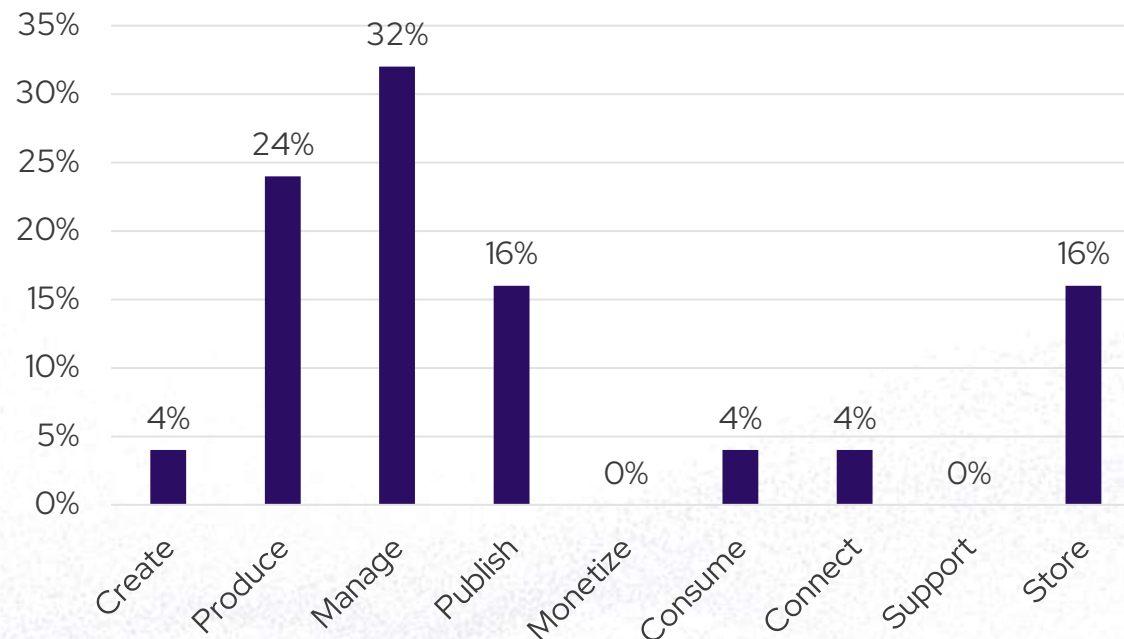
Cloud Computing



■ Have already adopted ■ Likely to adopt ■ Other

Q: Which of the following technologies has your organization already adopted? / Which of these technologies is your organization likely to adopt in the next three years? Period: 2025 Base: Media/production companies (n=62)

Cloud computing adoption across content supply chain (primary segment)



Q: In which of the following content supply chain segments have you adopted/are you most likely to adopt cloud? Single response. Period: 2025 Base: have already adopted or are likely to adopt cloud computing (n=25)

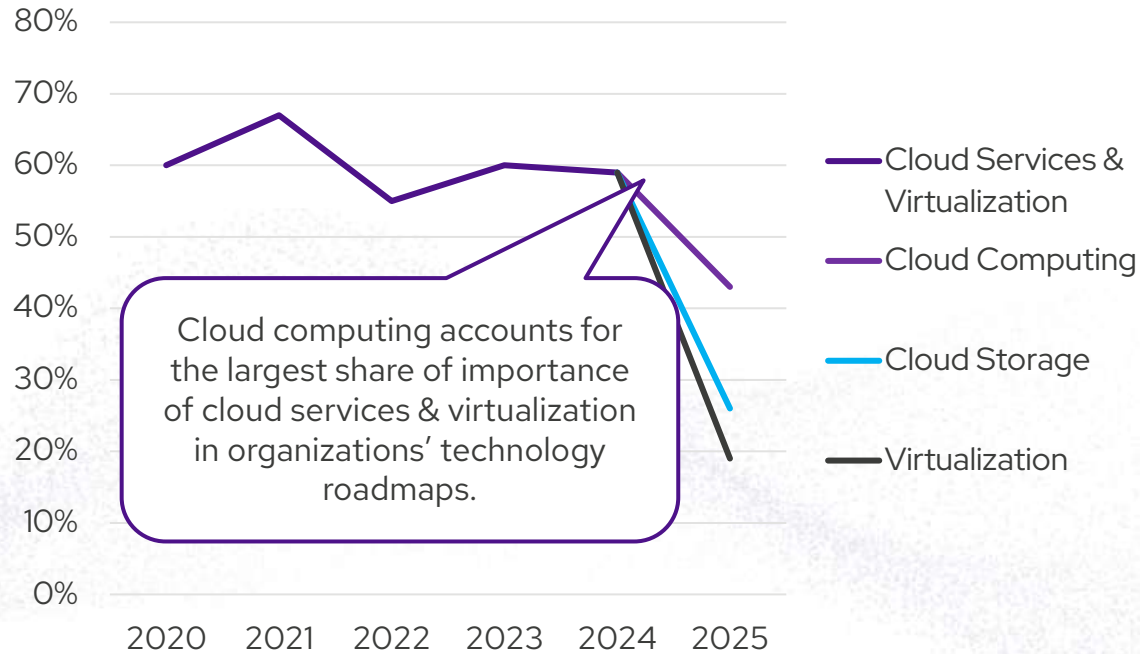
Source: IABM MediaTech Industry Tracker

TechAnalysis – Cloud

Cloud computing ranks above virtualization and cloud storage in importance

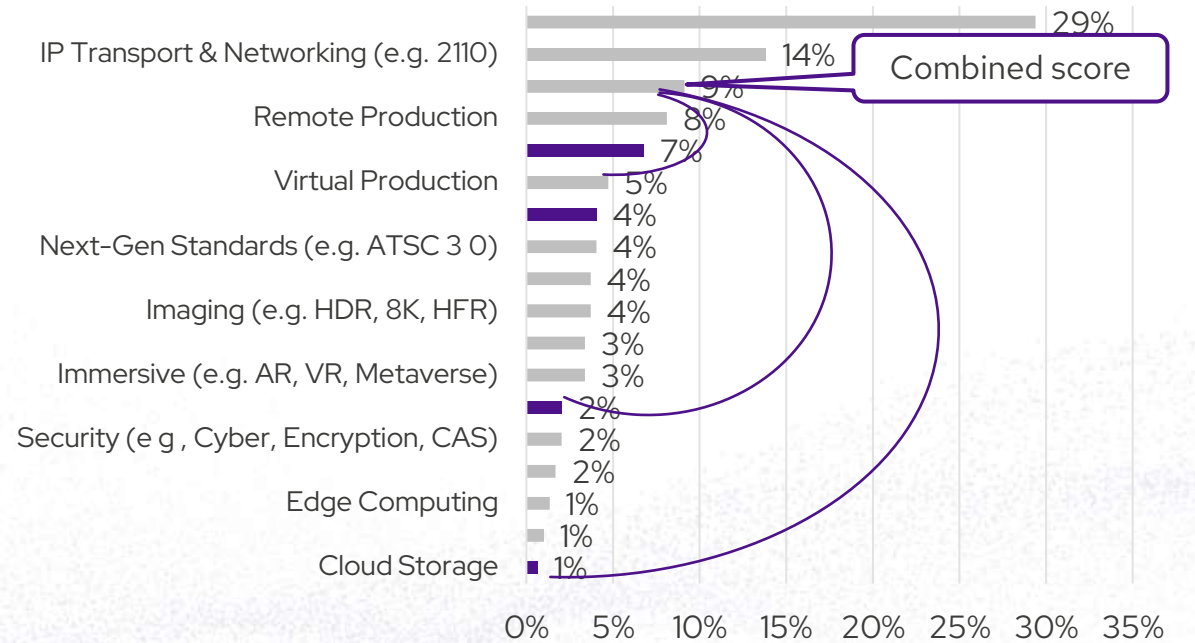


Importance of Cloud in technology roadmaps



Q. What are the most important trends in your organization's technology roadmap? (All that apply)
Base: All industry

Most important priority in technology roadmaps



Q. Please choose the most important trend in your organization's technology roadmap. (Single response)
Base: All industry, 2025, n=296.

Source: IABM MediaTech Industry Tracker

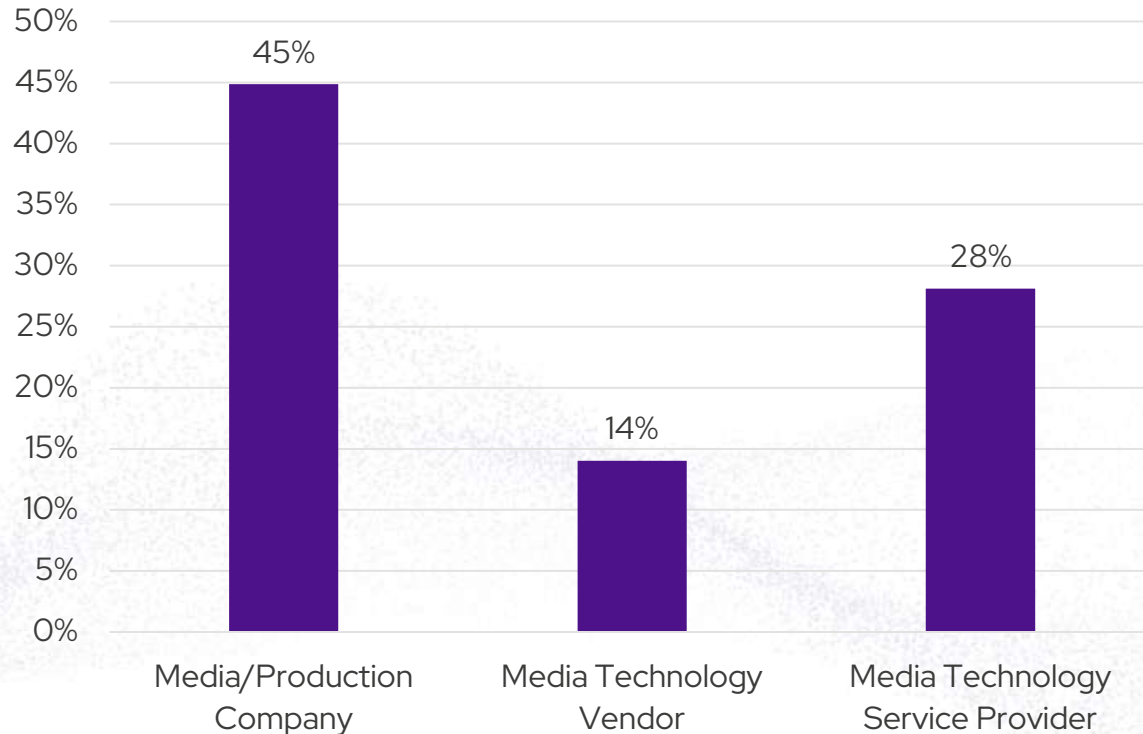
Note: In response to member feedback, IABM added segmentation of cloud services and virtualization in 2025, splitting it into three categories.

TechAnalysis – Cloud

Cloud storage remains a priority for nearly half of media production companies



Cloud Storage in technology roadmaps



Q: What are the most important trends in your organization's technology roadmap? (All that apply)
Base: All industry. Period: 2025

- ### Broadcast and media companies are prioritizing cloud storage
- Nearly half of respondents representing broadcast and media companies stated cloud storage was a priority in the technology roadmap of their organization, while cloud computing was almost equally important for supply and demand sides of media technology.
 - Media technology vendors put greater emphasis on virtualization, which is of less priority to end users of media technology, who tend to prioritize usability, efficiency, and end-to-end workflow simplicity rather than virtualization for its own sake.

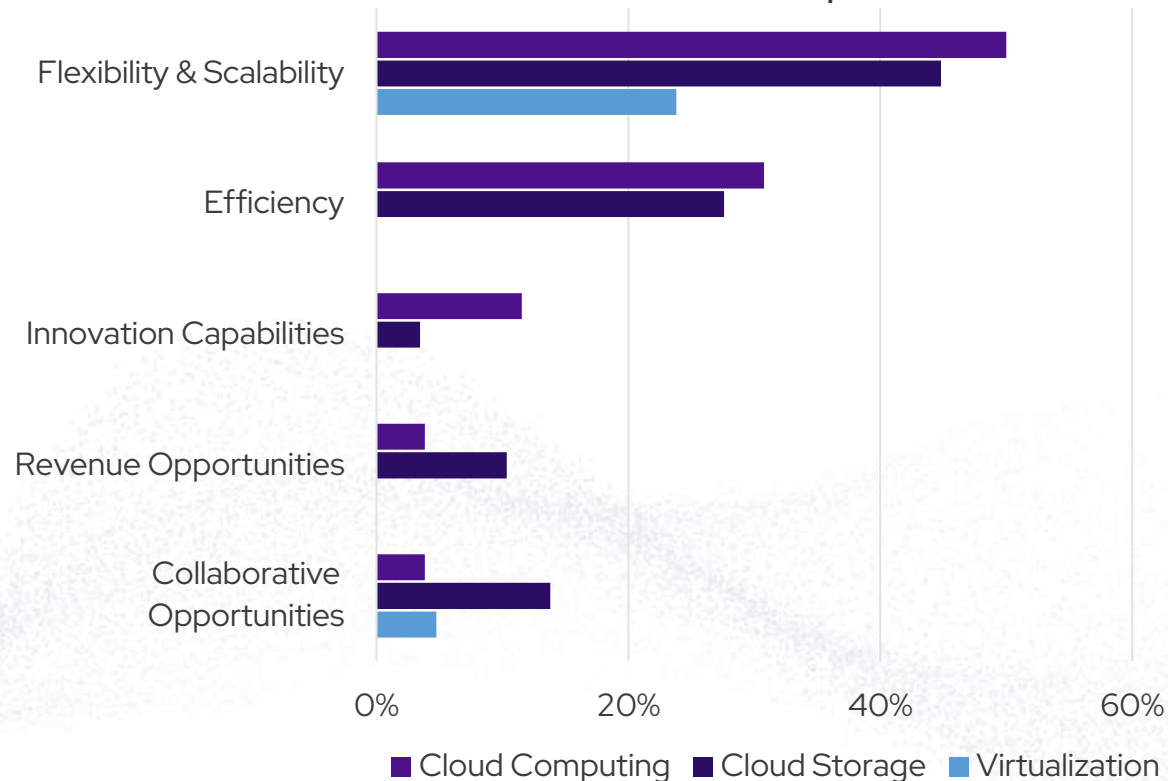
Source: IABM MediaTech Industry Tracker

TechAnalysis – Cloud

Cloud adoption is driven by flexibility, scalability, and efficiency



Drivers of Cloud adoption



Q: Please select the most important drivers of adoption. Base: media/production companies that have already adopted or likely to adopt IP technology. Period: 2025

Source: IABM MediaTech Industry Tracker

Drivers of adoption

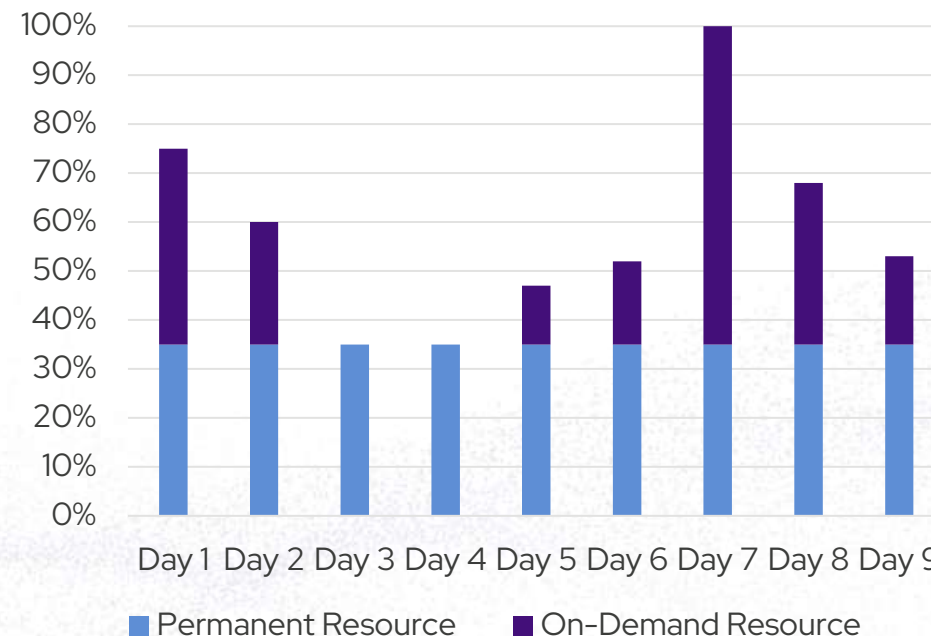
- Flexibility and scalability are the primary drivers behind cloud adoption in the broadcast and media industry, followed closely by efficiency. Cloud solutions empower media organizations with the ability to rapidly adjust and expand production workflows to meet shifting content demands and audience behaviors, all without the limitations of physical infrastructure.
- By moving workflows to the cloud, media companies can support remote teams, enabling seamless collaboration, and scaling resources in real time while only paying for resources used.
- Efficiency remains a crucial benefit, with cloud technology enabling automated, integrated workflows that reduce operational costs and improve productivity.

TechAnalysis – Cloud

Planning for predictability and strategic cloud use

- One of the most common aversions to cloud workflows from end-users has been “cost-shock” when hit with surprise bills due to unregulated use of cloud services or accidental overconsumption. A long-standing criticism has been complex billing structures.
- Service level agreements, pre-paid tokens, and other systems have also been necessary to convert the OpEx economics of cloud services into CapEx payments to support broadcast customers that are accustomed to tying investments and upgrades to projects, or tenders for public service broadcasters.
- The chart on the right demonstrates a theoretical instance where a media company has applied a hybrid cloud architecture to their compute resource, owning 35% of their total expected capacity as permanent resource to support their consistent baseline of usage, and paying for the remainder that they need on-demand based on daily-usage.
- The most effective cloud strategies involve media organisations planning for average use, and flexing above this when required, rather than building facilities for peak use.
- As a result, for effective use of cloud services they are best applied as a strategic tool for rapid scaling and agility rather than a total “lift and shift” of existing workflows into the cloud.

Allocating Resource with Hybrid Cloud Infrastructure



Source: IABM

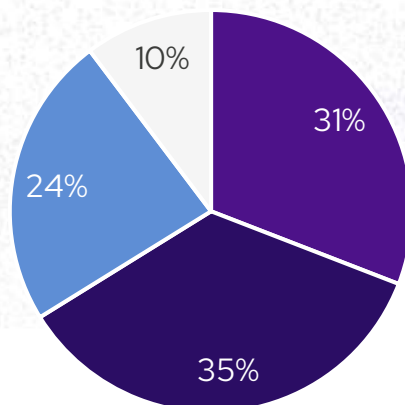
TechAnalysis – Cloud

Usage-based pricing became dominant payment model for cloud

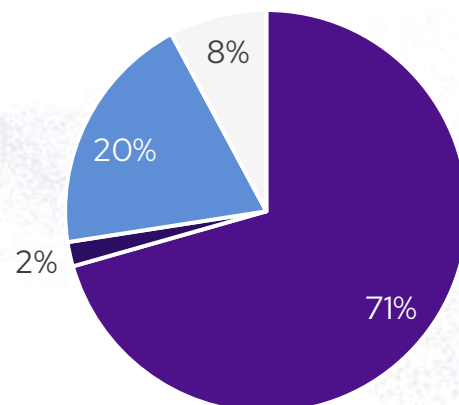
Preferred payment models

Usage-based pricing has become the dominant model for cloud services, aligning costs with actual consumption and offering flexible scaling for customers, while software procurement for on-premises or traditional applications continues to rely heavily on permanent (perpetual) licensing and, to a lesser but growing extent, subscription-based models.

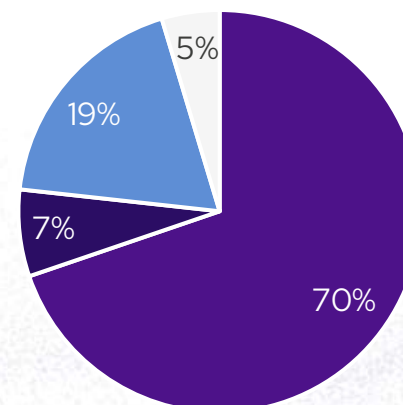
Software



Cloud Computing



Cloud Storage



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

Q: How does your organization prefer to pay for the following products/services? Period: 2025 Base: Media/production companies (Base: from 43 to 68)

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

Source: IABM MediaTech Industry Tracker

- For an effective total cost of ownership (TCO) equation for cloud workflows CapEx and OpEx must be treated separately. Cloud migration will typically lead to a reduction in CapEx, but OpEx spend may rise. In the short term the increase in OpEx may outweigh the reduction in CapEx until an inflection point is met. It is vital for vendors and buyers to be educated on the importance of working collaboratively with a range of internal stakeholders during the procurement process to ensure that the application of cloud is effective for the organization by design, and that as usage evolves it continues to make financial sense.
- Several early adopters of cloud workflows have established FinOps teams to help ensure successful change management. As a cultural and operational practice in an organization, FinOps takes responsibility for the financial management of cloud spend. FinOps can be most effective when technical engineering capabilities are incorporated as staff need to understand the application of the cloud resource in the organization's own unique media content supply chain. Cross department collaboration and communication are key to create effective approval processes for assigning capacity in the cloud and visibility to evaluate ongoing spend.
- Establishing a centralized team in an organization is often the most effective way of implementing a FinOps culture; however organizations that have not thoroughly planned their cloud strategy can be averse to this approach due to this being an additional cost associated with cloud integration or migration. Measuring service level agreements (SLAs) and holding public cloud providers accountable in delivering against them is an often unforeseen workload that FinOps teams can take ownership of.
- The timing of a migration to the cloud is also dependent on the lifespan of existing infrastructure. On-premises assets carry embedded value that needs to be assessed to determine how much longer they should continue to be operated and maintained vs upgraded. As a result, there remains a notable installed base of customers and facilities that have not yet been upgraded to integrate with modern cloud workflows. Adoption can also be very dependent on the cost of bandwidth, egress and ingress, and service availability in the region.

Source: IABM; GVx Whitepaper Above Us Only Sky: How Broadcasters can Determine TCO in the Cloud

TechAnalysis – Global Cloud Adoption

Regional adoption of cloud products relies on availability



- Typically, global organisations need a multicloud strategy to navigate regional requirements. Private clouds are also often used in conjunction with public cloud to meet security requirements. The expansion of cloud workflows across multiple regions requires the use of cloud federation. Federated cloud is the deployment of a unified computing environment across multiple different clouds; these can be private and public.
- To be successful federated cloud must distribute incoming demand equally between service providers. As demand for cloud resources increases, and the bandwidth required by these demands rises, network management becomes a critical challenge. For service providers and vendors that need multinational cloud connectivity this poses a threat to quality of experience for their customers as they are reliant on cloud and circuit operators to prevent a rise in outages as demand scales up. Tools that can provide detailed observability and reporting, such as millisecond outages, are valuable to operators to provide transparency and efficiency in troubleshooting and maintaining quality of service.

MediaTech Vendor in an IABM
Business Intelligence Interview

We need to see that there are no micro-outages so that our availability zone does not change on us mid-flight and cause a breakup in the service. [...] We would like to predict that; we would like to be the ones deciding when to do the switching. Precise observability can also detect a build up of cloud hardships minutes to hours before the network goes down and disrupt your service, this allows the user to switch manually or automatically to a different availability zone or cloud provider.

Adi Rozenberg
CEO and Co-Founder
AlvaLinks
(June 2025)

TechAnalysis – Global Cloud Adoption

Regional adoption of cloud products relies on availability



- Although hyperscalers like AWS, Microsoft, and Google provide a global footprint of datacenters, the technical specification of the resource in each location can vary. Vendors offering cloud native products or software as a service need to review the availability and performance needs of their product against the regional availability zones of hyperscalers, as well as the cost of bandwidth, to ensure that their product or service will be effective in a market geography. Reviewing the capacity of hyperscalers' availability zones is also important to be provisioned and secured for redundancy.
- Geopolitical conflict and war has motivated governments to implement more stringent regulation of security policy and data sovereignty. Evolving policy and futureproofing may influence an end-user's choice of cloud service provider and further complicate and fragment adoption.
- Although vendors can achieve cost efficiencies or other advantages from partnerships with hyperscalers, end-users are resistant to vendor lock in. To prepare for multicloud scenarios, many vendors have opted to design services to be cloud agnostic or offer end-users a "bring your own cloud" option so that customers do not need to migrate public cloud provider.
- Video processing creates high levels of GPU demand. The rise of AI has boosted the demand for GPUs, forcing media organizations to compete for available resource with a far broader universe of organizations due to the proliferation of AI applications across all verticals.

Source: IABM

TechAnalysis – Global Cloud Adoption

Regional adoption of cloud products relies on availability



- While the details of the regions and availability zones covered are available from cloud service providers, detail of the workstations/server capacity is not shown. Vendors building services on hyperscalers' resource can find it difficult to plan for differing customer experience and performance by region without this information. Furthermore, in the case of outage vendors have limited capability to support their end-users until the cloud provider has resolved the issue. Performance issues in the delivery of cloud services have made some end-users pull back from their investment in the cloud and increase on-premises investment again.
- Tools that can measure millisecond events and outages in the network for observability and reporting transparency are of great value to vendors offering services that rely on public cloud infrastructure. This documentation of traffic on the network improves the efficiency of troubleshooting and support. By having reliable documentation of networking events the service operator can provide a testimonial to the circuit provider, saving support from replicating an event to diagnose the origin of the problem.
- Hyperscalers continue to invest in new datacenters and infrastructure to expand cloud availability zones to more countries and markets. Data regulation and security requirements are influencing the nature of these investments as new considerations are introduced to media buyers' and suppliers' supply chains.

MediaTech Vendor in an IABM Business Intelligence Interview

The flexibility of the cloud is you can spin up and spin down as you want, now as you go to spin up there's none available as AI grabbed it all. We've had clients that wanted 40 seats, and they only got 20. The response from cloud vendors is buy them as a commitment. This undermines the original purpose of flexibility.

MediaTech Supplier (June 2025)

Source: IABM

TechAnalysis – Cloud Availability

AWS continues to expand regions and availability zones

Middle East (Kingdom of Saudi Arabia)

AWS is reported to be investing \$5.3b in the development of a new region in Saudi Arabia. Saudi Arabia's AI innovation company HUMAIN, announced plans to invest a further \$5b in a strategic partnership with AWS to develop a first of its kind "AI Zone" with dedicated AI infrastructure for accelerated training and inference.

South America (Chile)

A new AWS region will be launched by end of 2026 in Chile, adding three new availability zones to South America. The Chile region will provide infrastructure for AI,ML and data residency.



European Sovereign Cloud

A €7.8b investment, AWS European Sovereign Cloud is an independent cloud for Europe that operation autonomy and resilience to deliver on strict data residency requirements. The cloud infrastructure is "sovereign-by-design" built with customer input from financial services, healthcare and government to security and privacy conscious. The first region will be available in Brandenburg Germany by the end of 2025.

Sovereign cloud offers advantages to organizations that want strategic autonomy, greater control of their supply chain and addresses geopolitical concerns about foreign access to data. Within the specific context of the EU sovereign cloud also assists in GDPR compliance.

AWS Infrastructure	North America	South America	Europe	Middle East	Africa	Asia Pacific	Australia and New Zealand
Regions	9	1	8	3	1	13	3
Availability Zones	31	3	24	9	3	41	9
Network Edge Locations	31	7	31	7	4	23	5
Edge Cache Locations	3	1	2	0	0	4	1

Source: AWS

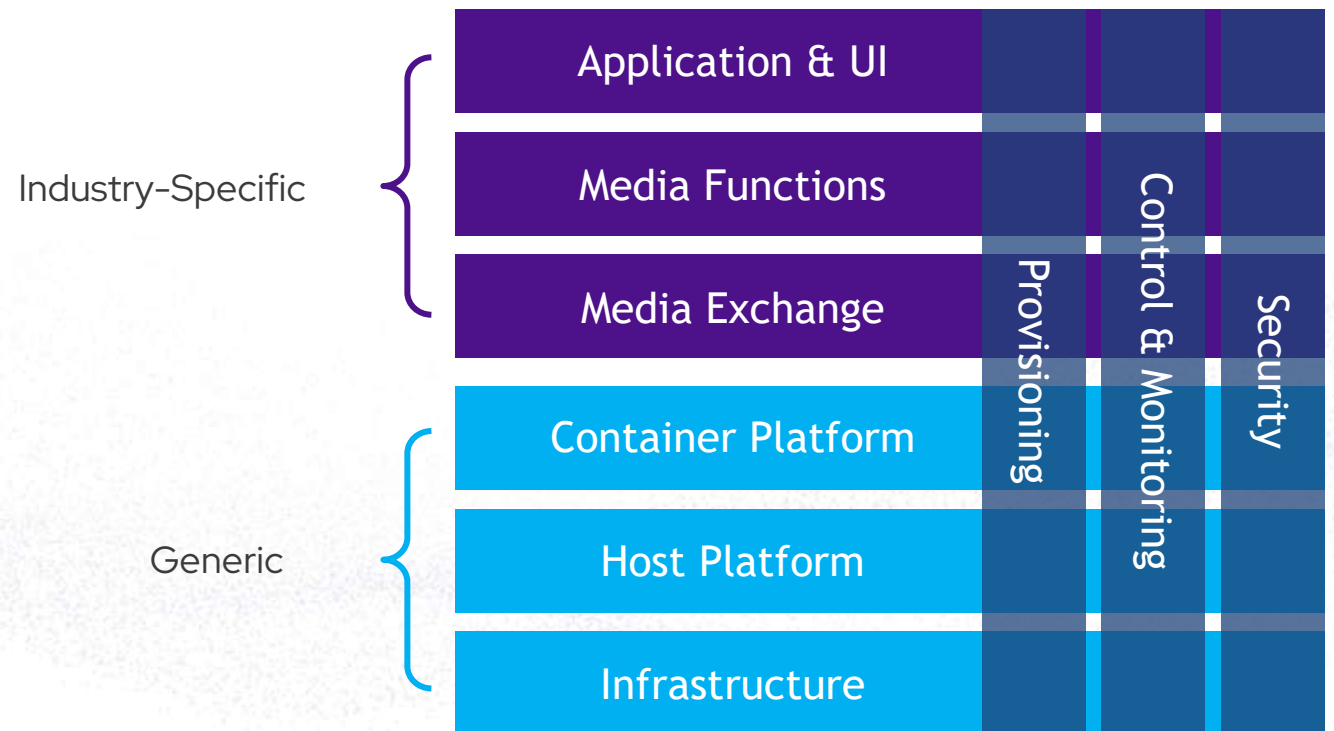
Please note that table contents represents active infrastructure and does not include new facilities in KSA, Chile and Europe that are forthcoming.

TechAnalysis – Building a Dynamic Media Facility

Dynamic hybrid cloud workflows need specialized and generic resources

- Maturing end-user attitudes to cloud deployments highlight that agile resourcing is a key reason to integrate cloud production tools into media facilities. To cater to all customers, cloud products need to be compatible with both pure cloud and hybrid cloud workflows. As a result, vendors are shifting their messaging around tools developed for cloud environments to promote their tools as infrastructure agnostic and software defined to avoid misconceptions that their products are exclusively tied to cloud deployment.
- The desire for agile deployment also ties in with a desire for best in breed system design.
- The European Broadcasting Union (EBU)'s Dynamic Media Facility Reference Architecture outlines a layered framework to build agile media technology stacks that can be deployed on-premise, at a remote location or in the public cloud.
- Three vertical layers are applied that are relevant across specialized and generic resource.
- The Media eXchange Layer initiative has been launched to focus efforts on the key area of development to provide shared access to video, audio and data between media functions. Transport is asynchronous to allow processing to outperform "realtime".
- MediaTech vendors are able to provide the greatest value to end-users in designing the application & UI, media functions and media exchange layers, while also integrating the necessary provisioning, control & monitoring and security requirements across all layers.

EBU Dynamic Media Facility Reference Architecture



Source: EBU The Dynamic Media Facility Reference Architecture Whitepaper

TechAnalysis – Containerized Applications

Agile production tools will be built on containerized architectures

- Container platforms provide an environment to package, deploy, run, control, monitor and remove software.
- In the Dynamic Media Facility Reference Architecture, the container platform is independent of the host platform and infrastructure allowing media functions to be isolated from one another aiding in access management and security.
- By organizing software containers in groups, shared storage and network resources can be applied to them, creating efficiencies.
- Kubernetes and Docker are open-source container technologies that are used to build and deploy microservices.
- Vendors that have invested in developing their next generation of software tools on a containerized architecture are able to tap into the momentum building around the MXL initiative; however, alignment with this project is not essential to provide the benefits of containerized software products to end-users.
- Technology vendors that serve application specific products to the broadcast media vertical should evaluate their products' suitability and readiness to be presented as containerized microservices as further development may be needed to enable applications to be interoperable on shared memory architecture, such as the Dynamic Media Facility Reference Architecture.



Docker enables containers to be built, tested and deployed rapidly by packaging software into standardized units with libraries, system tools and code. Provides a toolkit to build container image files for each microservice allowing them to be run in different environments.



kubernetes

Kubernetes is an open-source technology used to orchestrate containers by managing, coordinating and scheduling them to allow systems to be scaled dynamically. Applications can contain multiple microservices; Kubernetes aids in the operating complexities of deploying these by managing multiple containers across multiple servers at scale.

Source: IABM, Dynamic Media Facility Reference Architecture; AWS; GitHub

TechAnalysis – AI/ML

Deep dive into recent trends and the adoption of AI/ML

18 April 2026

TechAnalysis – AI/ML

AI/ML is maturing in Produce and Manage, and emerging in Create



AI/ML Adoption Status

Create

Media businesses are testing AI-based image-to-video solutions and video extension tools (e.g. Sora, Google AI Ultra, Adobe Firefly) to automate content creation for social media platforms. Cameras using AI-based tracking are emerging in Tier 2-3 sports.

Produce

AI/ML is widely used to automate tasks in post-production such as transcription, translation and summarization. Some production teams are already testing AI chatbots to aggregate siloed historic metadata and establish relationships between different information points to make storytelling more engaging. Newsrooms are using AI for story-centric content aggregation and social media descriptions.

Manage

Multimodal and multilingual AI capabilities such as generative AI indexing are becoming increasingly important in improving content discovery and resale potential of archived content. Agentic AI systems and video analytics AI agents are being tested for media asset management as well as localization, automating dubbing and providing contextual and semantic analytics to improve monetization.

Publish

AI/ML is automating low latency and deterministic content delivery, adapting dynamically to network conditions. Media businesses are investing in AI tools to optimize resources across multiple CDNs and to improve client-side analytics (Common Media Client Data).

Monetize / Consume

Agentic AI systems enable the 'conscious' AI agents to learn from interactions with users and predict their needs, enabling one-to-one personalization at scale. Major streaming players like Netflix and YouTube have recently introduced AI-generated interactive ads.

Support

Proactive AI-based monitoring tools enable end-users to get to the edge of networks, manage large data volumes, monitor quality of experience (QoE), quality of service (QoS), compliance in multiple languages, as well as use AI for competitor analysis and insights.

Store/Connect

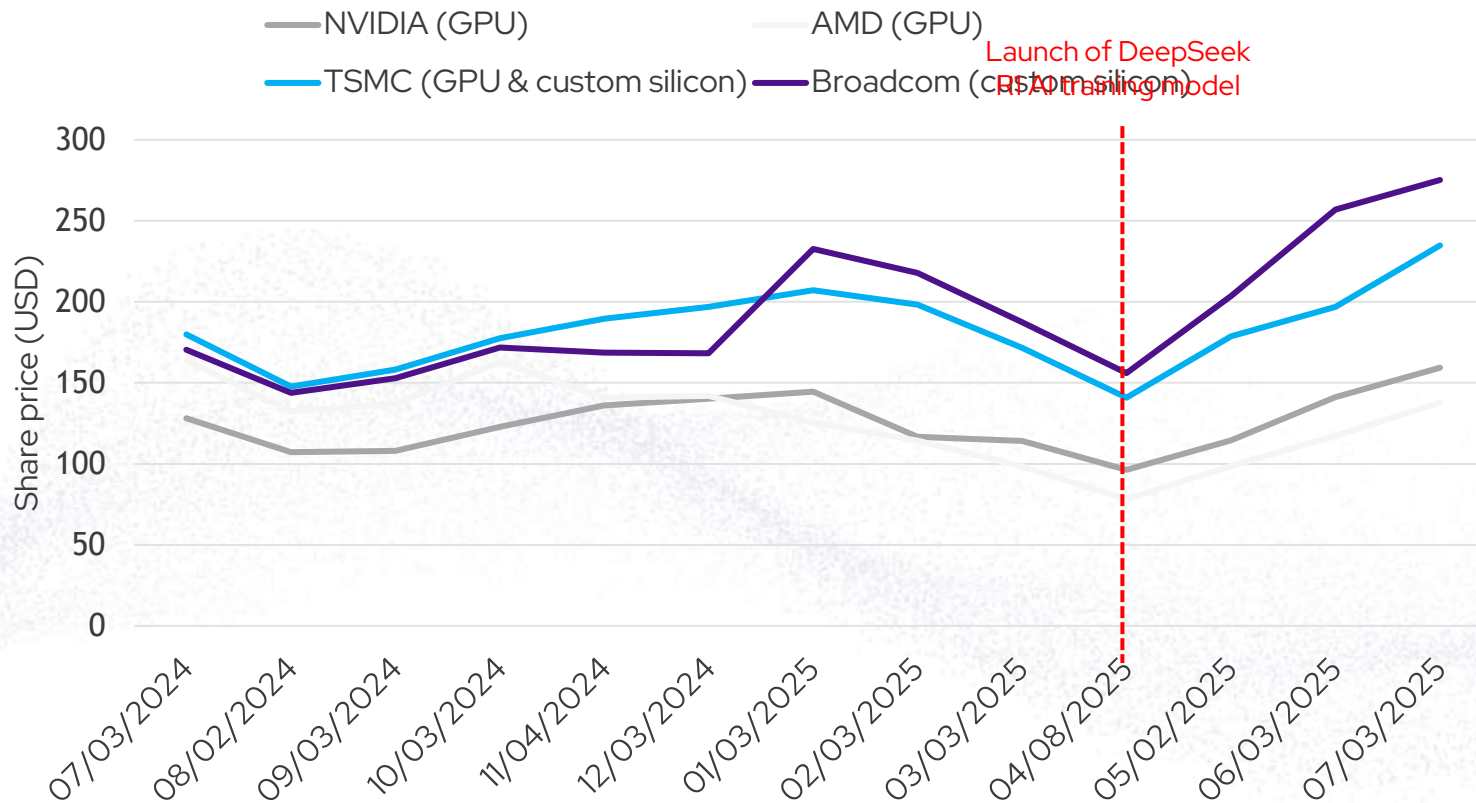
Predictive AI/ML analytics help media companies to optimize storage usage in real-time, while AI-driven content organization tools can sort videos and metadata by themes and visual elements. AI-based dynamic and distributed bandwidth allocation can reduce packet loss and latency. AI/ML is increasingly integrated into managed file transfer (MFT) systems, improving security.

Source: IABM

TechAnalysis – AI/ML

Hyperscalers are investing in custom silicon design to control cost and the AI value chain

Share prices of selected GPU makers vs. custom silicon designs



AWS' announces Project Rainier based on custom silicon design – June 24th 2025

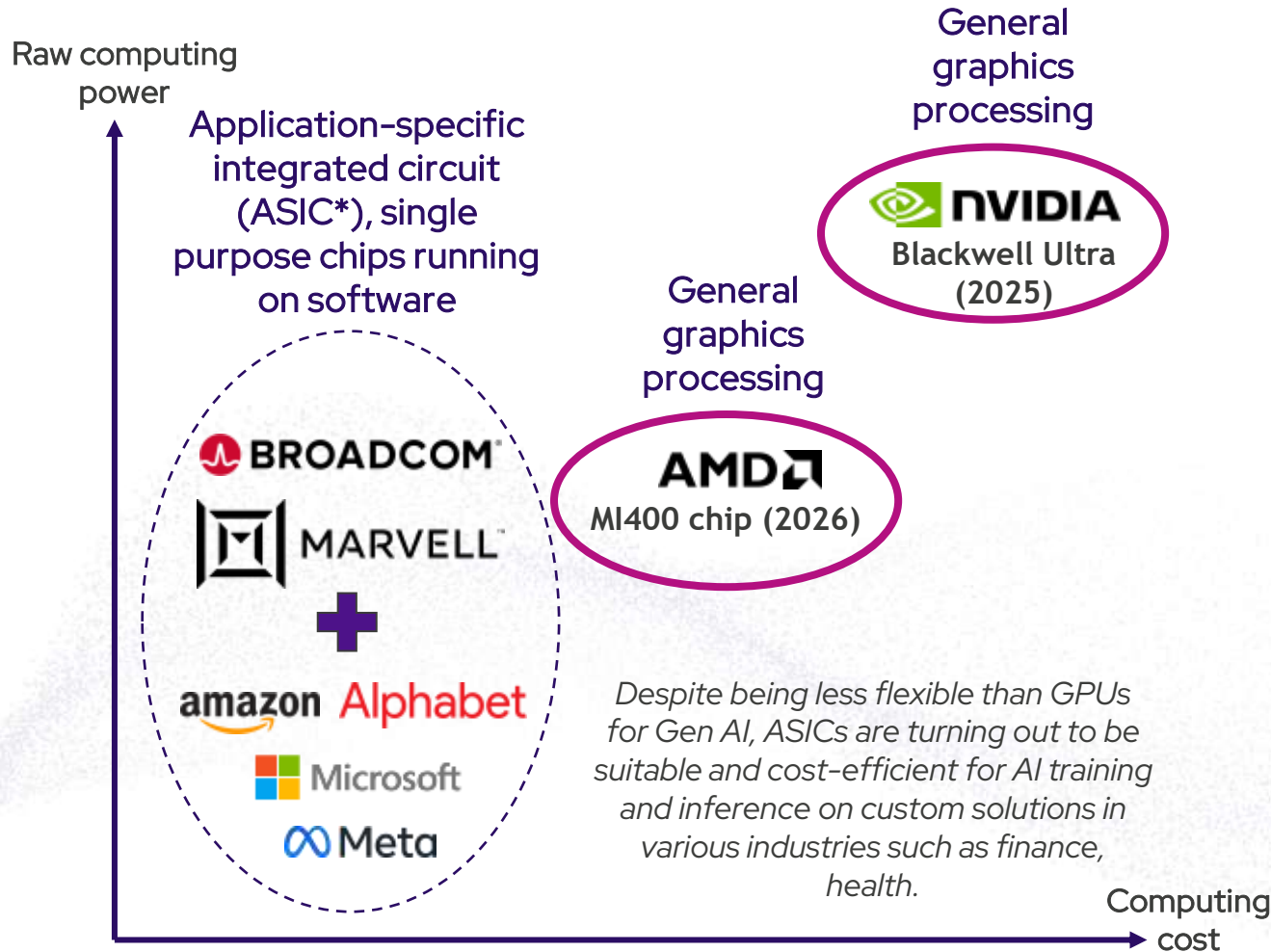
When you know the full picture, from the chip all the way to the software, to the servers themselves, then you can make optimizations where it makes the most sense.[...] Because we have an overview of everything, at every level, we can troubleshoot rapidly and innovate much faster.

Rami Sinno
Director of Engineering
Annapurna Labs of AWS
(June 2025)

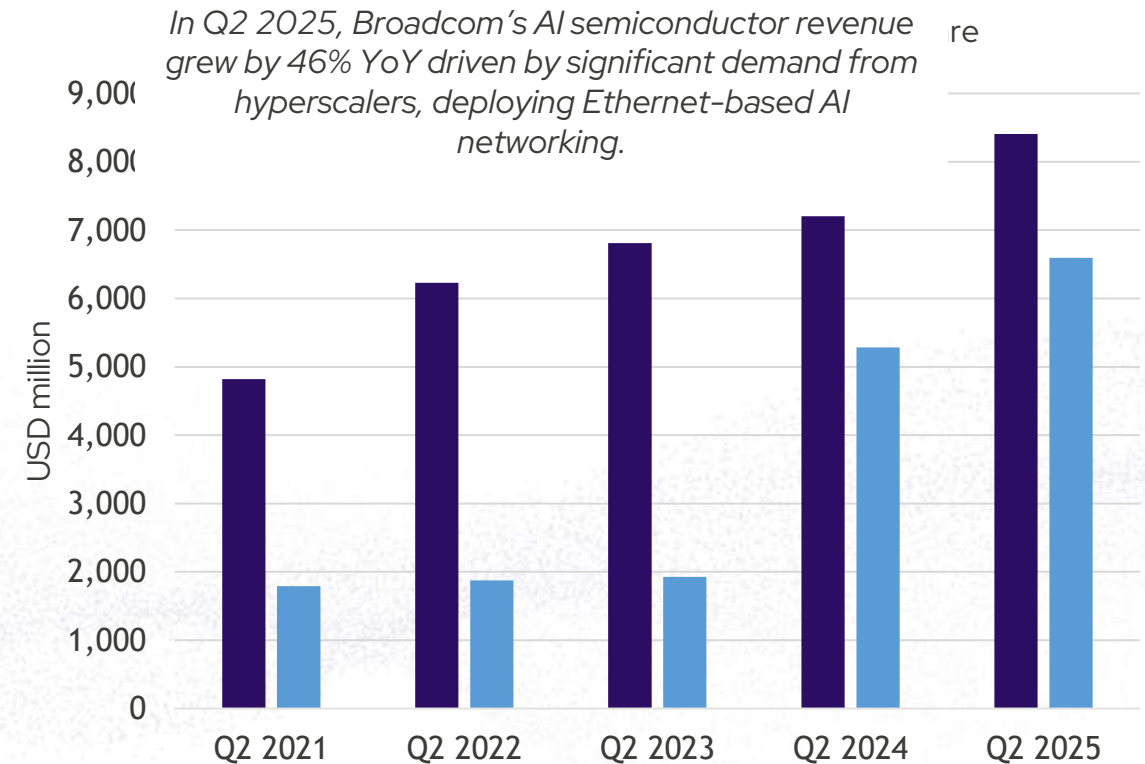
Source: IABM, Company Filings, AWS

TechAnalysis – AI/ML

Investment in AI is shifting from large generalized systems to smaller specialized AI models



Broadcom quarterly revenue by segment (YoY)



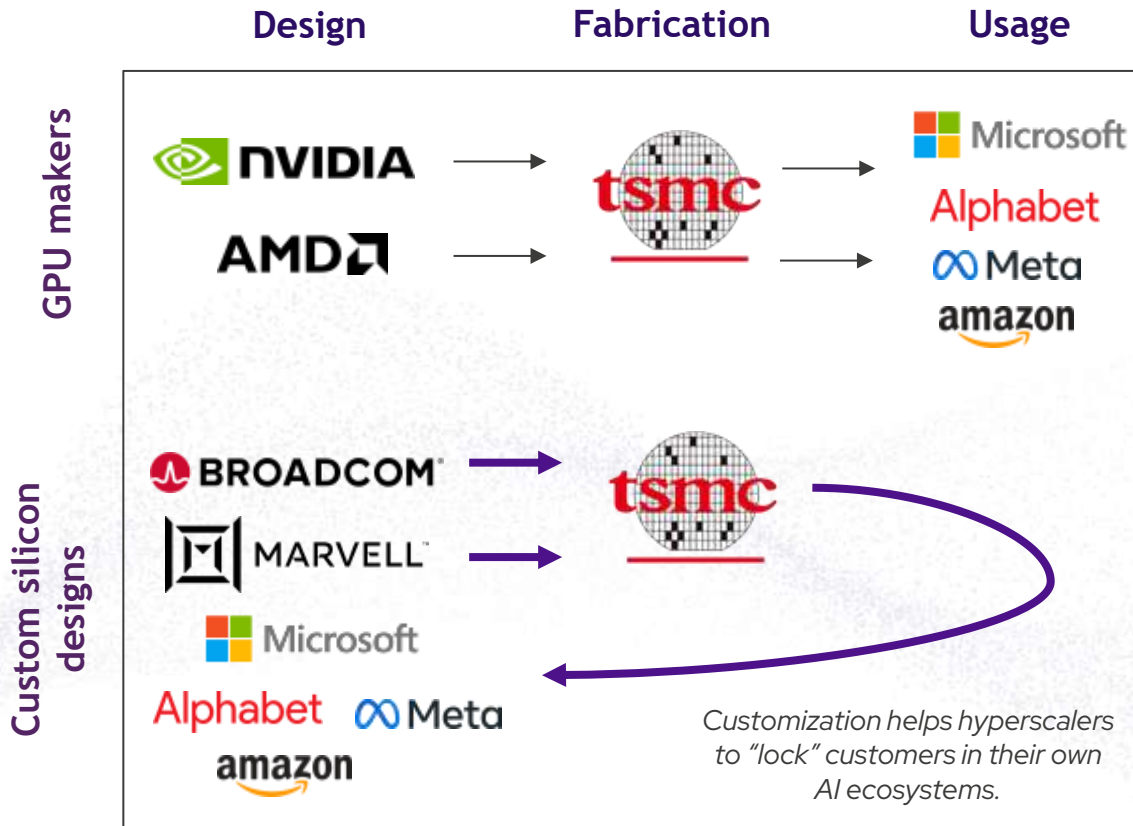
Source: IABM, Company Filings. Note: Custom silicon designs are based Application Specific Integrated Circuits (ASICs) which are domain-specific tools customized to train smaller, specialized AI models.

TechAnalysis – AI/ML

Proliferation of custom silicon could make high-end compute accessible to smaller players

Competitive landscape for US high-end computing

Broadcom's earnings call – June 5th 2025



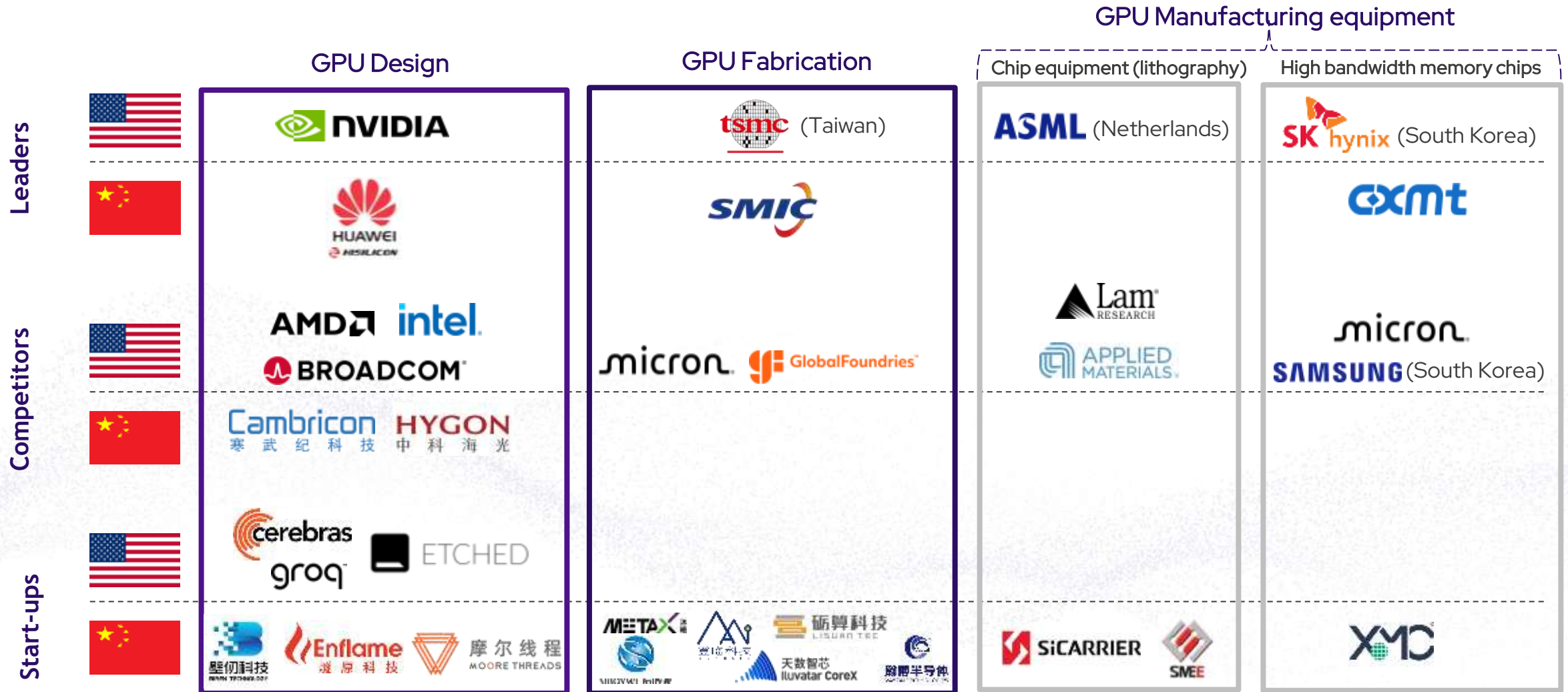
As custom accelerators get used and get developed on a roadmap with any particular hyperscaler, there's a learning curve on how they could optimize the way the algorithms on their large language models get written and tied to silicon. [...]
The fundamental value in creating your own hardware versus using a third-party merchant silicon is that you are able to optimize your software to the hardware and eventually achieve way higher performance than you otherwise could. And we see that happening.

Hock Tan
CEO
Broadcom Inc
(June 2025)

Source: IABM, Company Filings

TechAnalysis – AI/ML

Chinese startups emerge, while bottlenecks remain in the GPU supply chain



Source: IABM, CNBC, jw.jijiwei.com

TechAnalysis – AI/ML

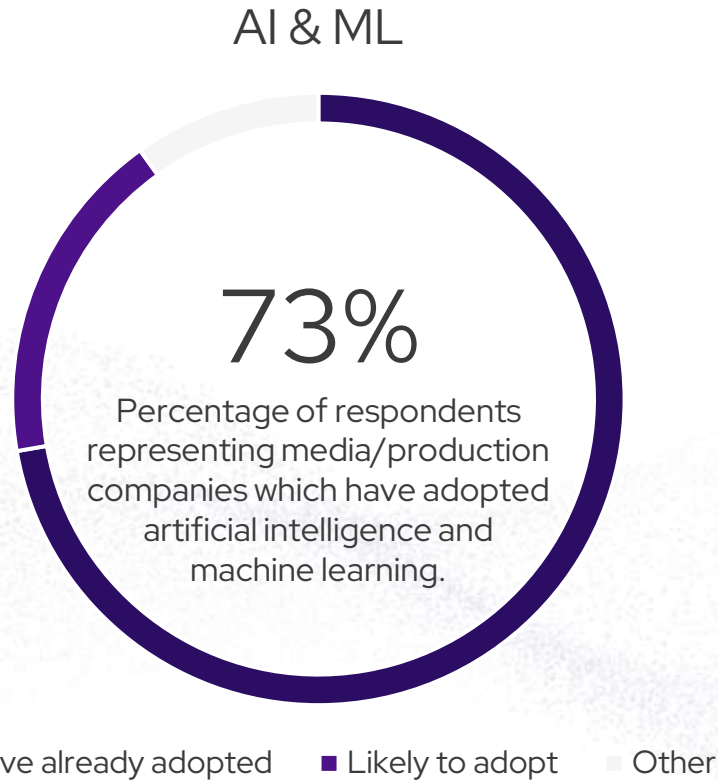


Lighter open-source AI technologies are democratizing access and the training of LLMs

	2018-2021	2022	2023	2024	2025 (as of Q3)
Supervised Fine-Tuning (SFT)	T5,mT5,FLAN		Alpaca	LLaMA 3.3	
Reinforcement Learning from Human Feedback (RLHF)		Instruct GPT FLAN-PaLM&T5	Gemini LLaMA 1 & 2 Claude GPT4	Gemini Exp, Gemma Qwen 2.5 o1 GLM-4	Gemini 2.0 o3
Direct Preference Optimization (DPO)			Mistral	LLaMA 3 & 3.1 Mistral Large2 Qwen 1.5 & 2	
Multimodal	Clip	Flamingo	Gemini & PaLM-E GPT-4V LLaVA	Veo, Gemini Pro 1.5 & Imagen 3 Qwen-VL DeepSeek – VL2 Pixtral 12B LLaMA 3.2 Claude3.5Opus&Sonnet Nova Pro Grok-2	Grok-3 Kimi – k1.5 Claude 3.7 Sonnet Gemini 2.0
Retrieval-Augmented Generation (RAG)				Qwen2 Nova Pro LLaMA 3 Series GLM-4 AFM Series	
Mixture of Experts (MOE)			Mistral	DeepSeekMoE,V2&V3 DBRX Yi-Large Qwen2.5 Grok-2 Jamba 1.5 Mistral 8*22B	DeepSeek R1 Claude 3.7 Sonnet
Reasoning				DeepSeek V3 QwQ-32B preview Gemini 2.0- Flash GLM zero o1	DeepSeek R1 Grok-3 QwQ -32B Claude 3.7 Sonnet o3 mini Kimi k1.5

TechAnalysis – AI & ML

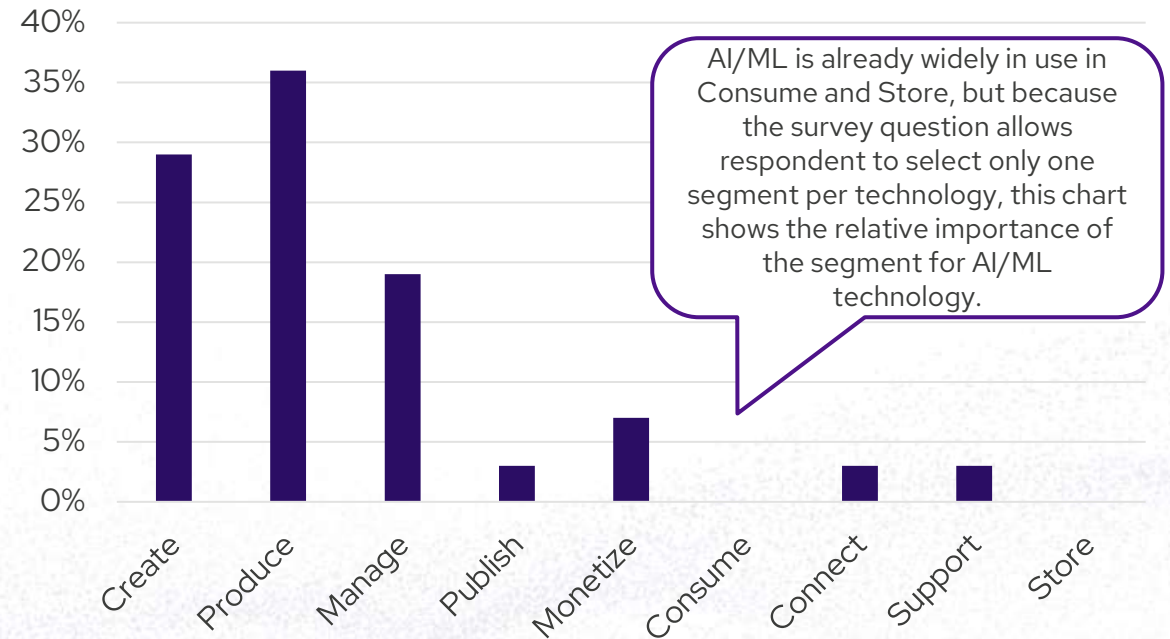
AI's main application areas include Create, Produce, and Manage



Q: Which of the following technologies has your organization already adopted? / Which of these technologies is your organization likely to adopt in the next three years? Period: 2025 Base: Media/production companies (n=62)

Source: IABM MediaTech Industry Tracker

AI & ML adoption across content supply chain (primary segment)



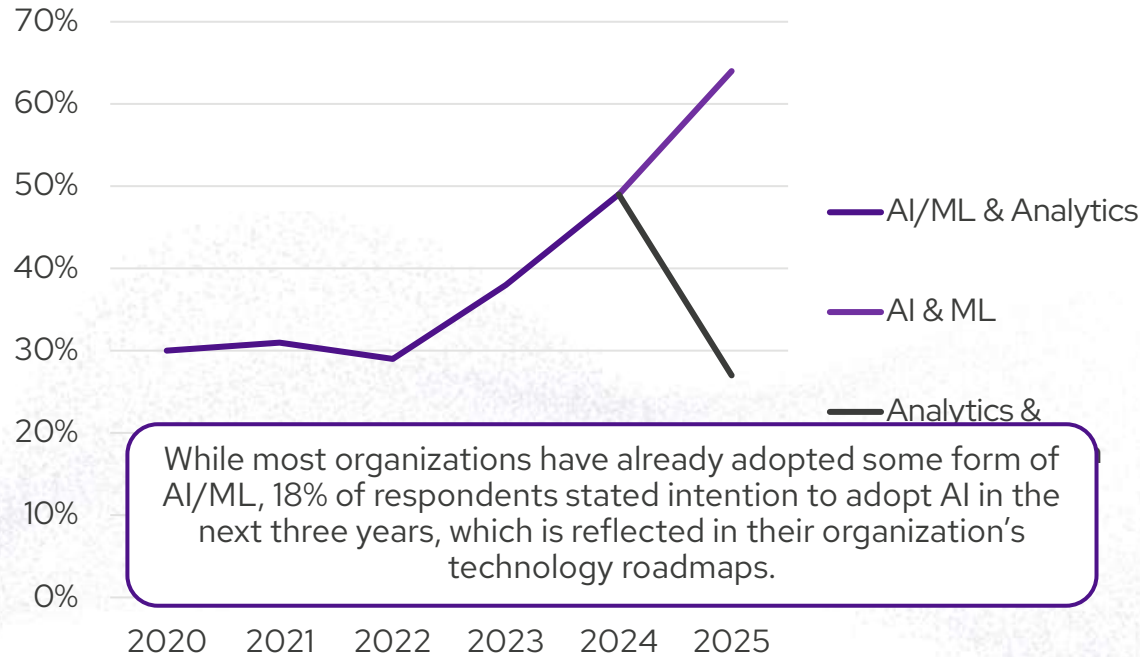
Q: In which of the following content supply chain segments have you adopted/are you most likely to adopt AI&ML? Single response. Period: 2025 Base: have already adopted or are likely to adopt IP technology (n=31)

TechAnalysis – AI & ML

AI & ML continues growing faster than other technologies, leading tech roadmaps



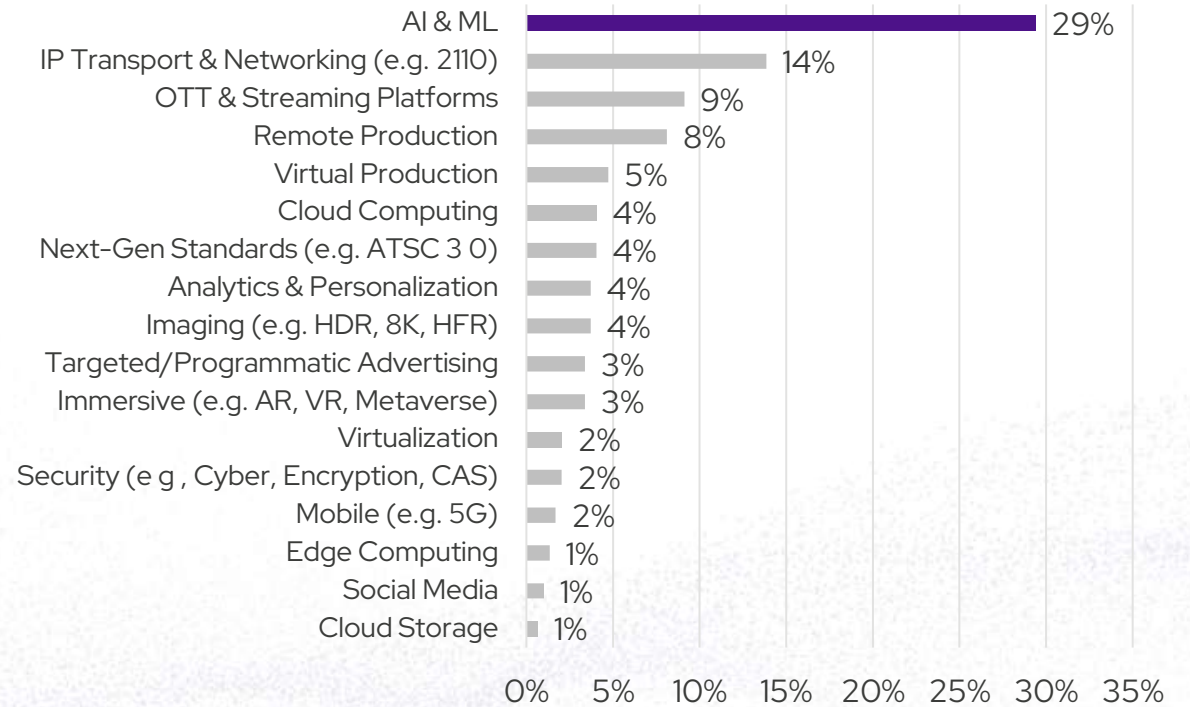
Importance of AI & ML in technology roadmaps



While most organizations have already adopted some form of AI/ML, 18% of respondents stated intention to adopt AI in the next three years, which is reflected in their organization's technology roadmaps.

Q. What are the most important trends in your organization's technology roadmap? (All that apply)
Base: All industry

Most important priority



Q. Please choose the most important trend in your organization's technology roadmap. (Single response)
Base: All industry, 2025, n=296.

Source: IABM MediaTech Industry Tracker

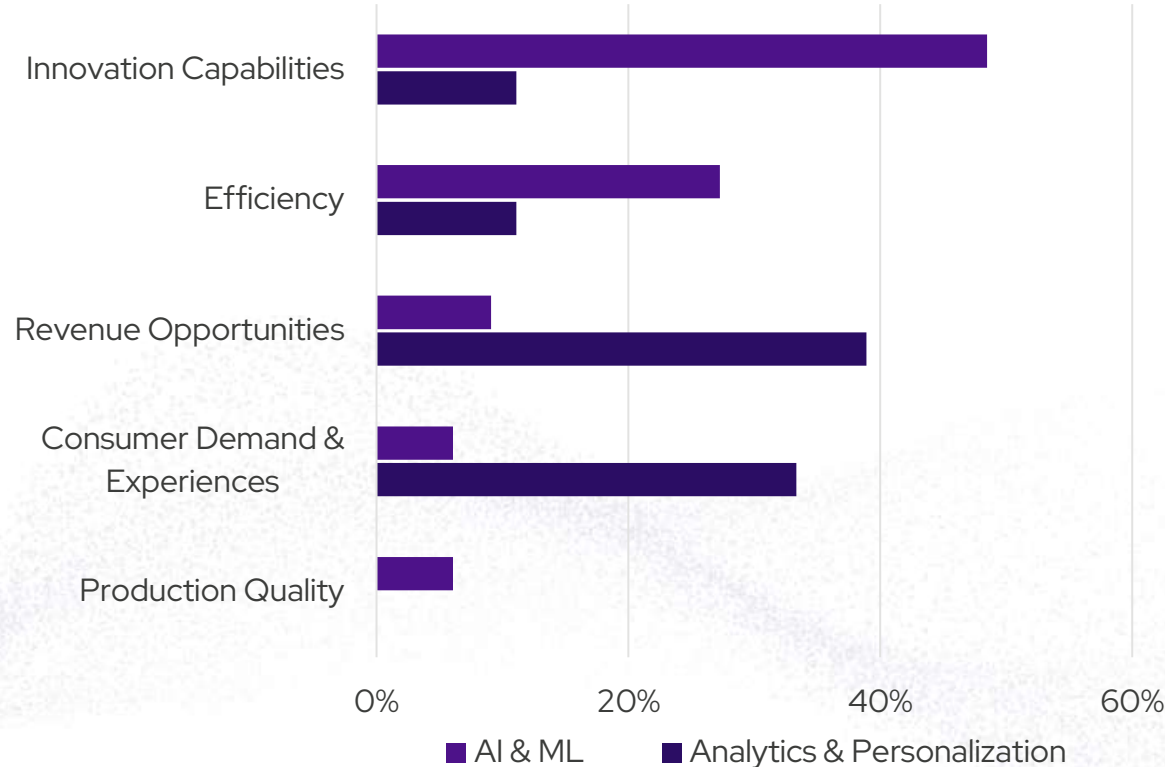
Note: Due to rapid evolution of AI, IABM added granularity for AI/ML & Analytics in 2025, separating AI/ML from Analytics & Personalization.

TechAnalysis – AI & ML

AI & ML adoption is driven by innovation potential and efficiency



Drivers of AI/ML adoption



Q. Please select the most important driver of adoption. Base: media/production companies that have already adopted or likely to adopt IP technology. Period: 2025

Source: IABM MediaTech Industry Tracker

Drivers of adoption

Innovation capabilities are the primary driver of artificial intelligence and machine learning adoption by broadcast and media companies, followed by efficiency. AI & ML has become the fastest-growing priority in technology roadmaps across all business types – from media technology vendors to service providers to media and production companies.

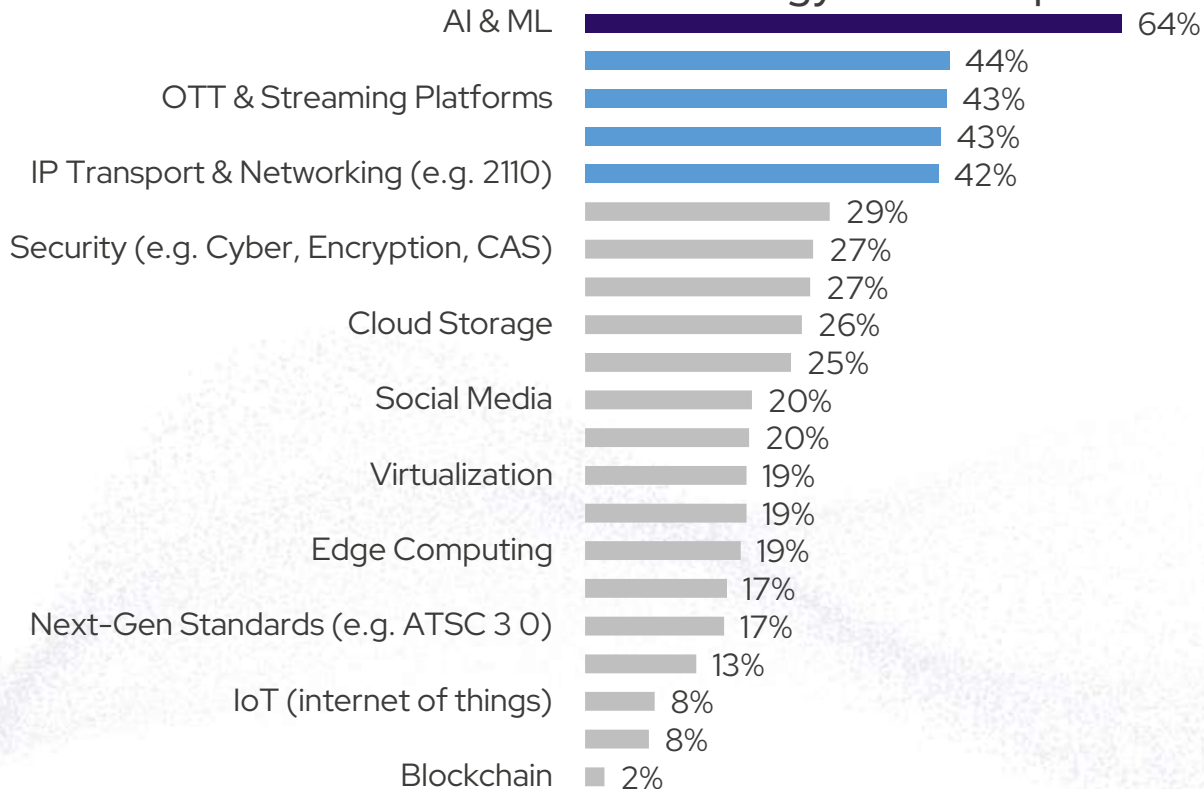
While most of media technology end users have already adopted some form of AI, there is still great growth potential, with nearly one-fifth of media organizations indicating likely AI & ML adoption in the next three years. Currently, AI & ML has been primarily used at the beginning of the media supply chain – in content creation, production, and management. However, application areas are expanding to every segment of the media supply chain – from glass to glass.

TechAnalysis – AI & ML

Importance of AI is increasing fastest in tech roadmaps, driven by efficiency

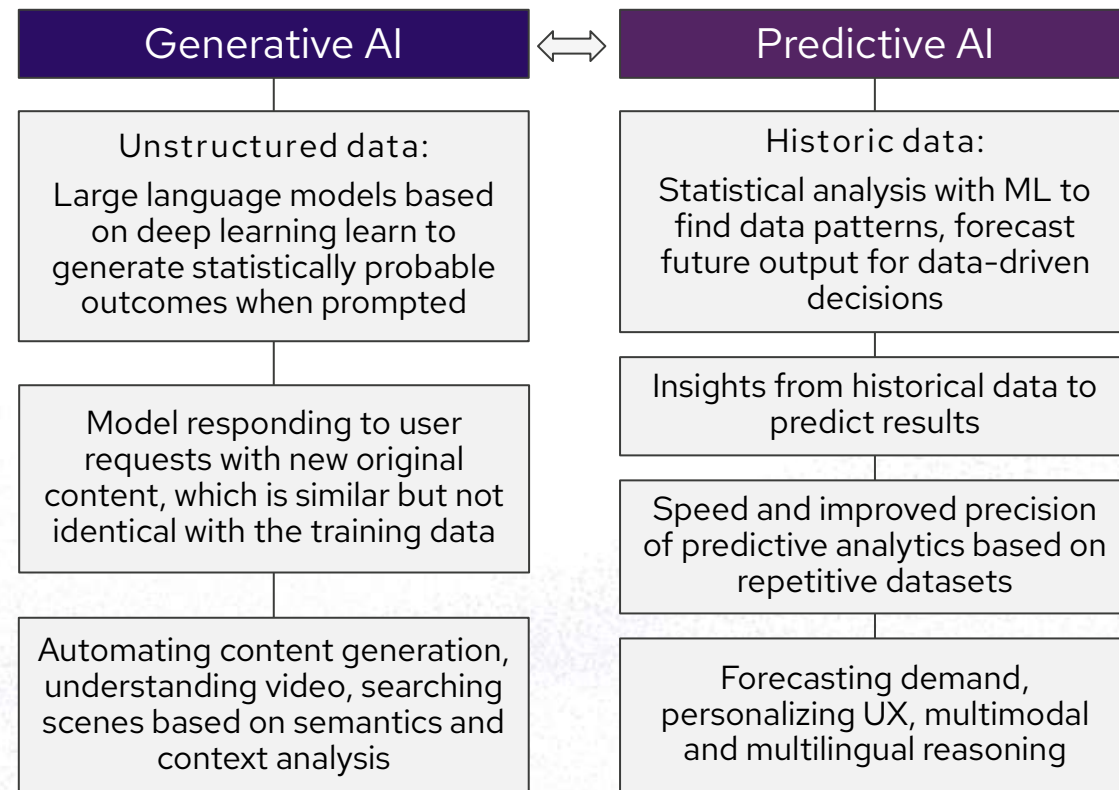


Technology Roadmap Priorities



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

Relevant trends in AI training



Source: IABM MediaTech Industry Tracker, IBM

TechAnalysis – AI & ML

AI/ML adoption is driven by innovation capabilities, efficiency and revenue opportunities



MediaTech Vendor in an IABM Business
Intelligence Interview

Right now, we're just trying to save the same people time. We're not trying to replace creative jobs. [...] We see AI as just expanding the scope of automation. [In the past] they used to have to send content out to get captions and get it translated. Now we can use AI and that can be completely automated. I think content creation's going to get a major upgrade in terms of what it costs and how long it takes to create content. It will start with short form content, commercials and other things, but I think that's going to explode.

MediaTech supplier
North America
(October 2025)

MediaTech Vendor in an IABM Business
Intelligence Interview

For our customers, adopting AI is about efficiency, accuracy and time to market. The speed is important because in online media 10 minutes is a long time. [...] It's also all those commercial things that AI and automation can give you – today all the competitive analysis can be done automatically with one click and you can get all the main topics that your competitors are airing. AI can give you information and views which you could not receive before.

Sima Levy
President & Founder of Actus
Digital, a LiveU company
(July 2025)

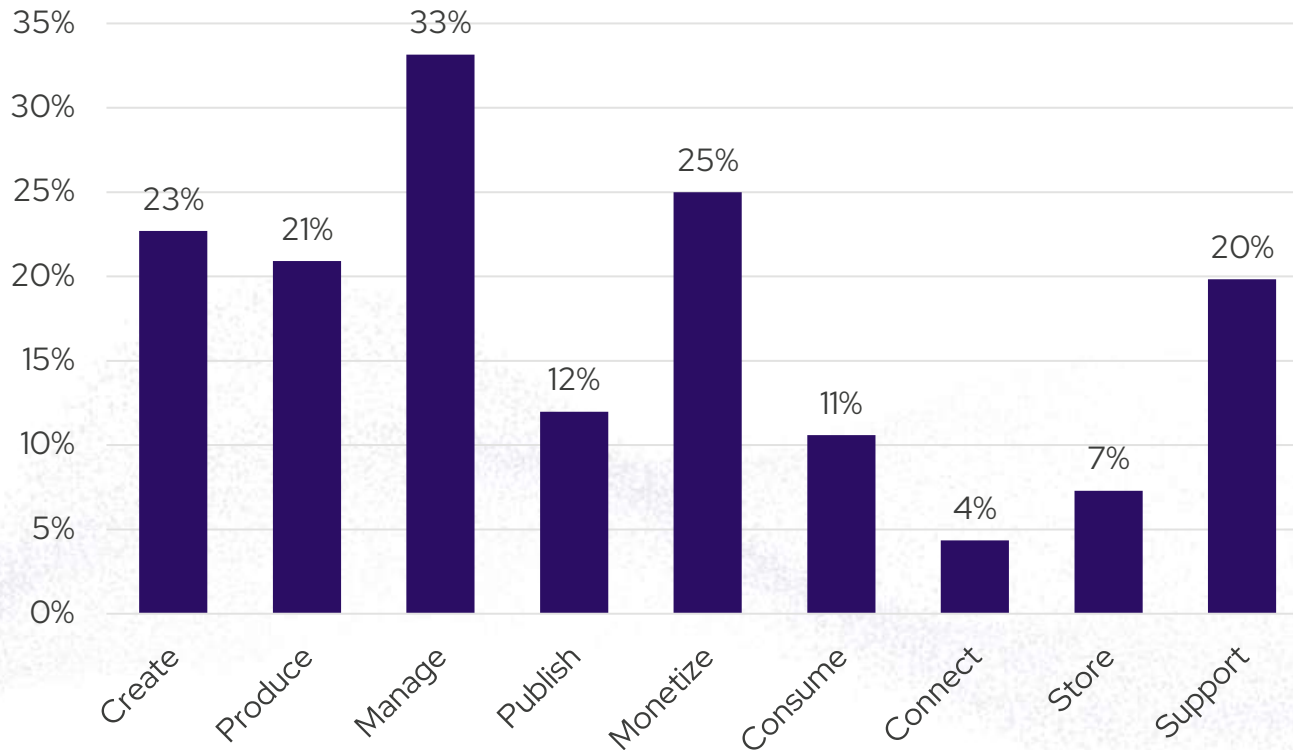
Source: IABM

TechAnalysis – AI & ML

Gen AI is accelerating the adoption of AI/ML in Create and Produce, as easy-to use AI tools emerge



AI & ML as an investment driver in content chain



Q. Please select the most important technological drivers of investment in each of the following content supply chain segments.? (media technology buyers, sample size = 85 to 178 per content chain segment)

Source: IABM MediaTech Industry Tracker

MediaTech Vendor in an IABM Business Intelligence Interview

Moonvalley released Marey [the first commercially safe foundational AI video model for Hollywood studios] a couple of weeks ago. That's a giant leap forward for those of us in the creative space. It's giving us the toolsets that we're used to using, but they are now superpowered by AI. You're starting to get to the place where you have the best of both worlds.

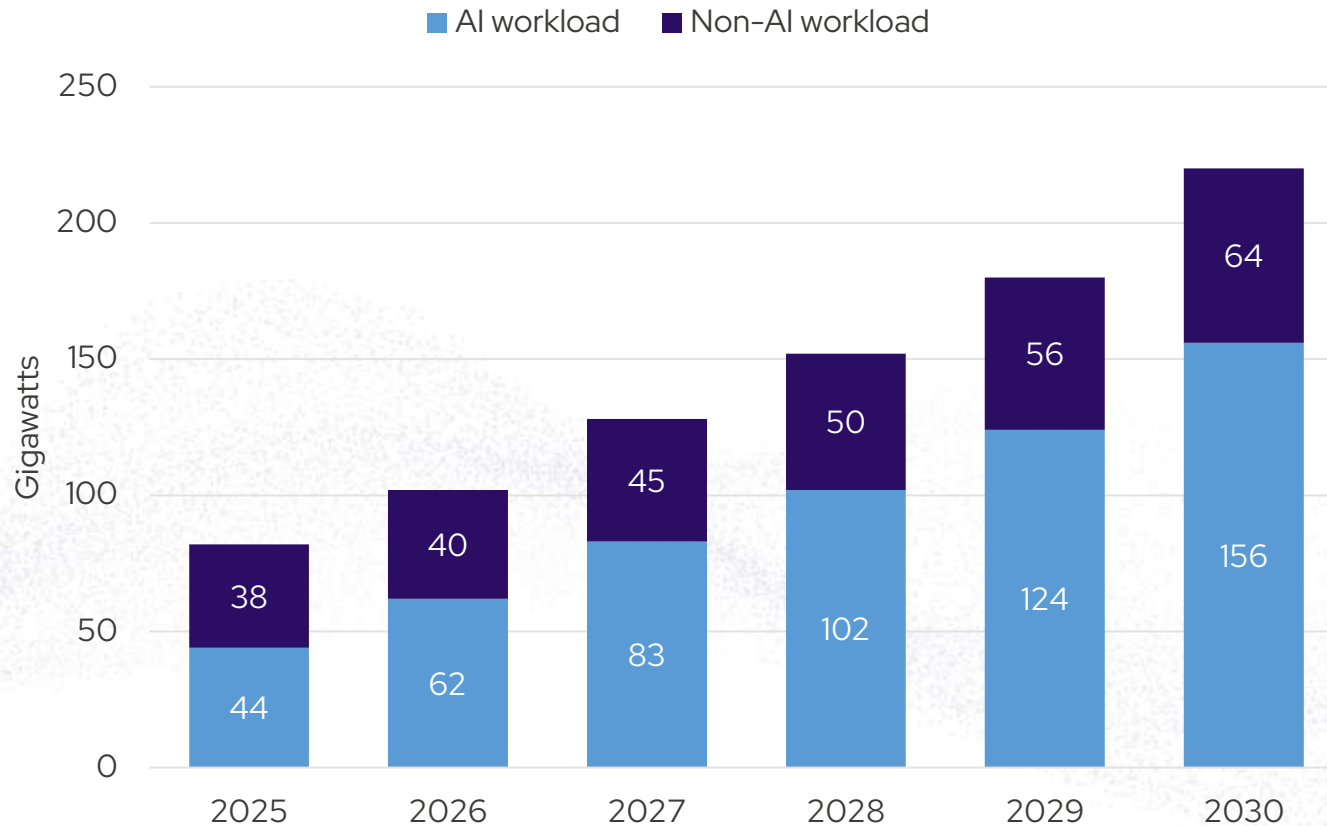
Renard Jenkins
CEO, Co-founder
I2A2 Technologies, Studios & Labs
(July 2025)

TechAnalysis – AI & ML

Proliferation of mainstream AI/ML tools will accelerate demand for data center capacity



Global data center capacity demand – Forecast



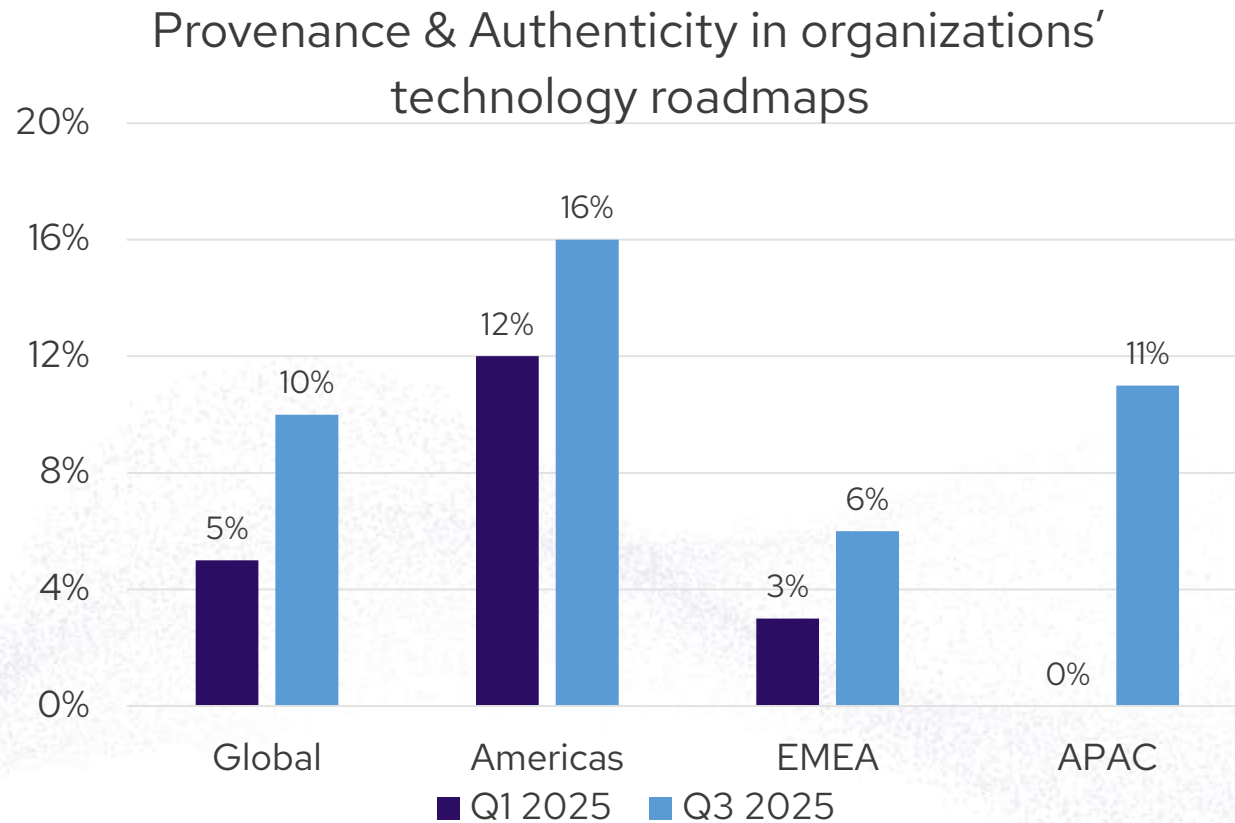
Alphabet earnings call – July 23rd 2025

It's been a viral hit with people sharing clips created in the Gemini app and with our new AI filmmaking tool, Flow. Since May, over 70 million videos have been generated using VO3 and we recently introduced a feature in the Gemini app to turn photos into videos. [...] Powered by VO3, our new short video product in Workspace called Google Meets reached nearly one million monthly active users.

Sundar Pichai
CEO
Alphabet
(July 2025)

Source: IABM, McKinsey, Company Filings

Provenance & Authenticity is increasing in importance as end-users adopt AI/ML in Create, Produce



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

Source: IABM

MediaTech Vendor in an IABM Business Intelligence Interview

Some of our customers are really starting to investigate a hybrid production process that utilizes AI and live action together to create an output that is a film or another piece of IP. We are seeing people start to integrate AI into the actual production pipeline and asking us more about what would that process look like and how does that workflow work. [...] It's still in its nascent stages, but there are studios that are implementing that type of hybrid process today in films that we'll probably see within the next 12 months.

AI technology firm
North America
(July 2025)

TechAnalysis – OTT & Streaming Platforms

Deep dive into recent trends and the adoption of OTT & Streaming technologies

TechAnalysis – AI & ML

Streaming technologies are particularly transforming Publish, Monetize and Consume



OTT & Streaming Technology Focus by Content Chain

Create

The increasing importance of secondary streams of live events, short videos for social media platforms as well as the video content produced by the creator economy is driving demand for DSLR/mirrorless cameras, camcorders and prosumer equipment.

Produce

The adoption of IP in production workflows has enabled live and remote production for streaming platforms and social media platforms at scale. The proliferation of open standards-based online production tools ((e.g. Netflix's Media Production Suite) are enabling independent content creators, less experienced filmmakers and geographically distributed creatives to co-create content.

Manage

Cloud-based MAMs enable remote access to global teams preparing content. AI-based multimodal analytics tools help streamers to localize and adapt content for international distribution. Content preparation and compliance with local regulations and cultural norms is crucial as global streaming services now compete with local streaming services in more markets like MENA and APAC.

Publish

The adoption of AI in video compression and the emerging AI-powered video encoding tools are improving efficiency and the quality of content. Streamers are increasingly interested in multicast IP distribution to manage skyrocketing CDN costs.

Monetize / Consume

As ad-supported streaming keeps maturing, server-guided ad insertion (SGAI) is giving content owners better control over dynamic ad targeting at scale during live events. AI-driven personalization and recommendations are improving UX and engagement.

Support

AI-enriched real-time content and compliance monitoring tools are providing visualized analytics of the whole system as well as providing insights for a competitive analysis, supporting streamers' content strategies and decision-making.

Store/Connect

Increasing cloud and CDN costs have led to cloud repatriation initiatives as organizations reevaluate their use of cloud services and move to hybrid environments. Multicast IP combined with CDN distribution and dynamic switching from multicast to unicast is offering cost and energy savings as well as ensuring low latency.

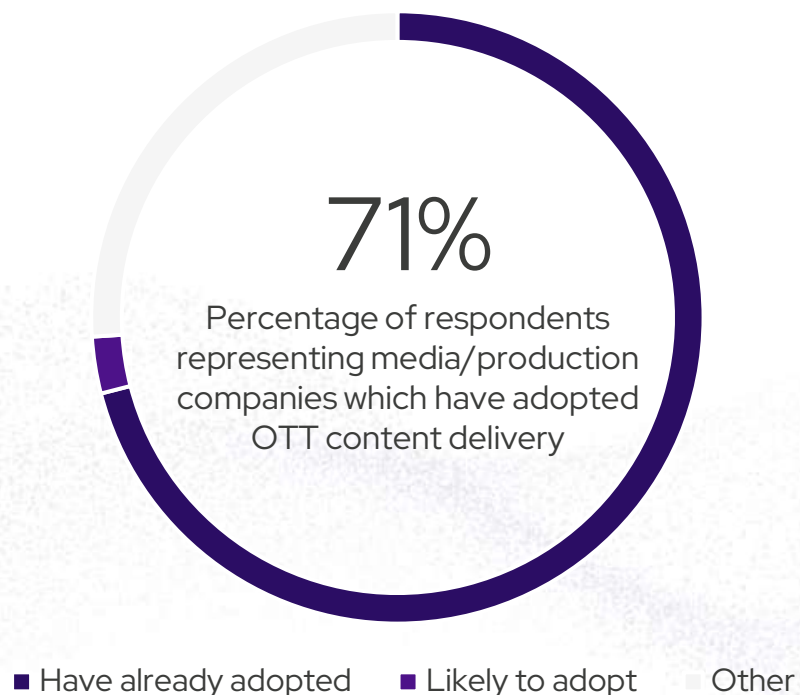
Source: IABM

TechAnalysis – OTT & Streaming

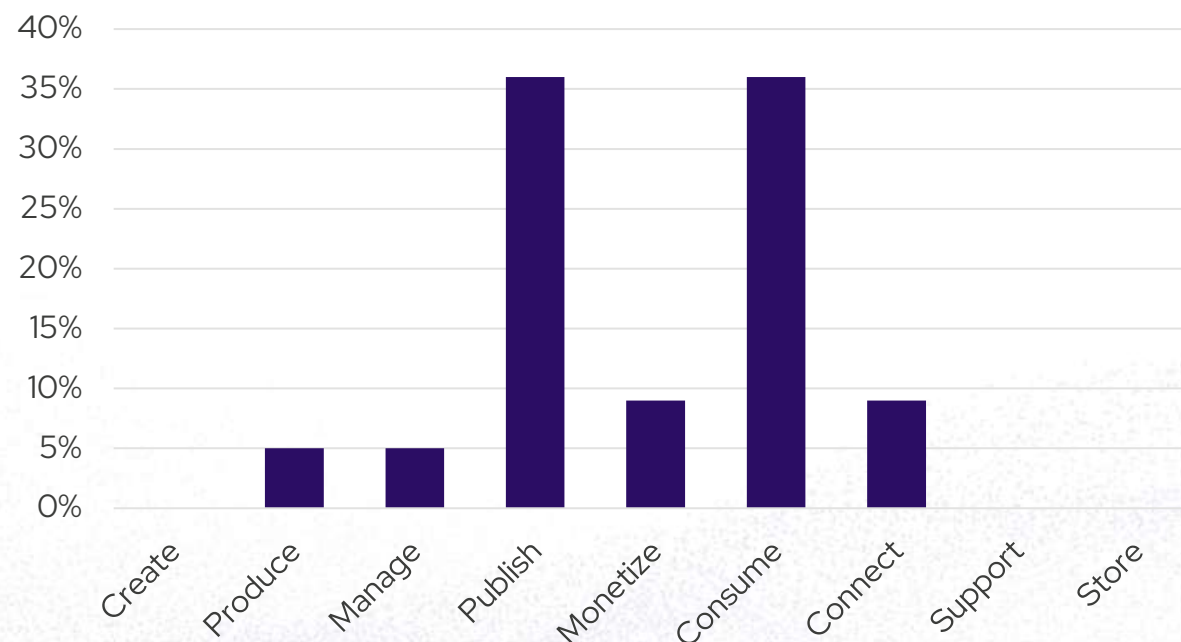
OTT is maturing, being primarily used in content distribution and consumption



OTT & Streaming Platforms



OTT adoption across content supply chain (primary segment)



Q: Which of the following technologies has your organization already adopted? / Which of these technologies is your organization likely to adopt in the next three years? Period: 2025 Base: Media/production companies (n=62)

Q: In which of the following content supply chain segments have you adopted/are you most likely to adopt OTT? Single response. Period: 2025 Base: have already adopted or are likely to adopt IP technology (n=22)

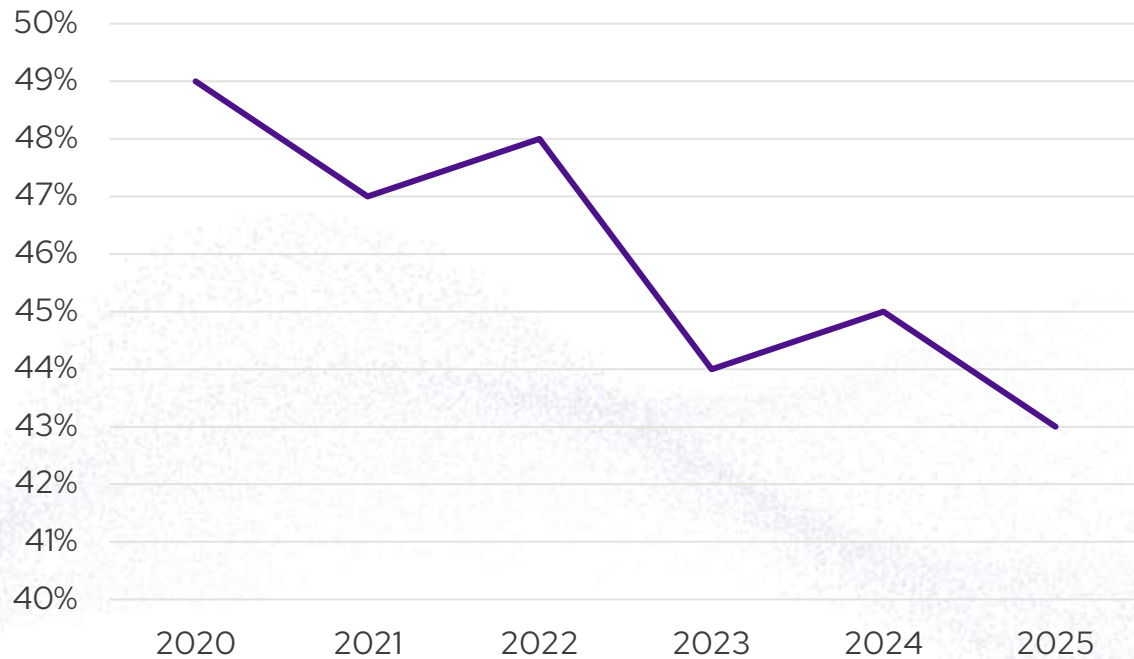
Source: IABM MediaTech Industry Tracker

TechAnalysis – OTT & Streaming

OTT ranks third in importance when a single technology is prioritized, reflecting its maturity

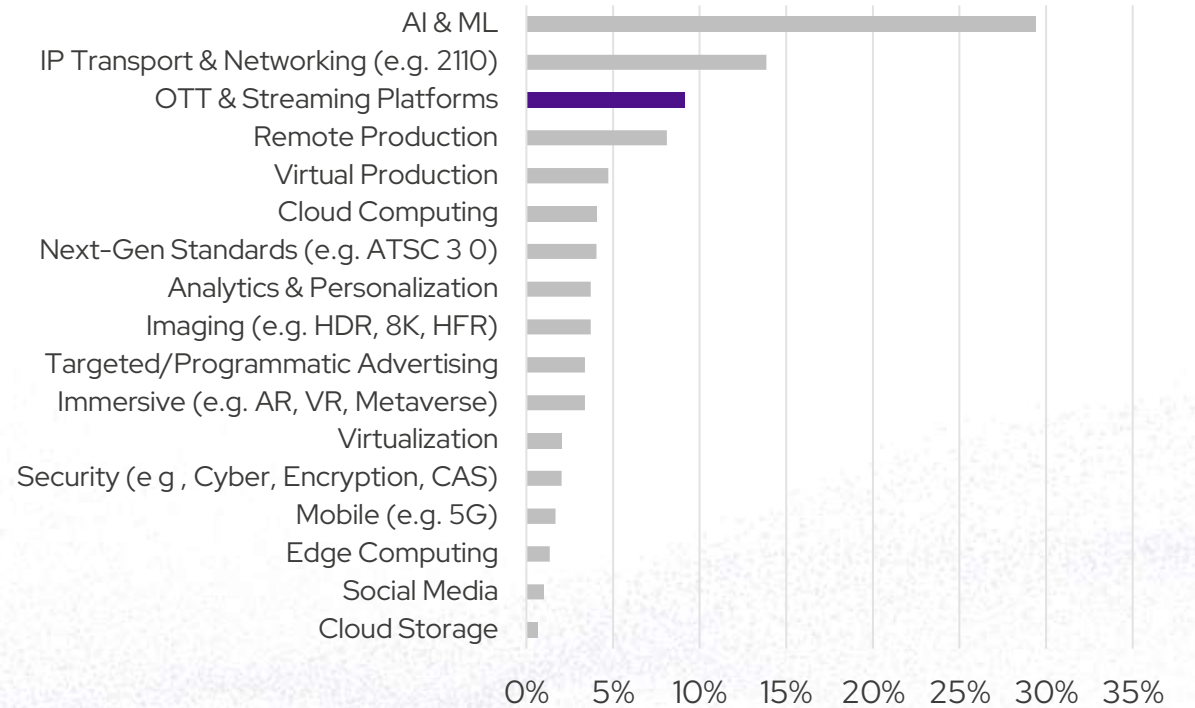


Importance of OTT & Streaming in technology roadmaps



Q. What are the most important trends in your organization's technology roadmap? (All that apply)
Base: All industry

Most important priority



Q. Please choose the most important trend in your organization's technology roadmap. (Single response)
Base: All industry, 2025, n=296.

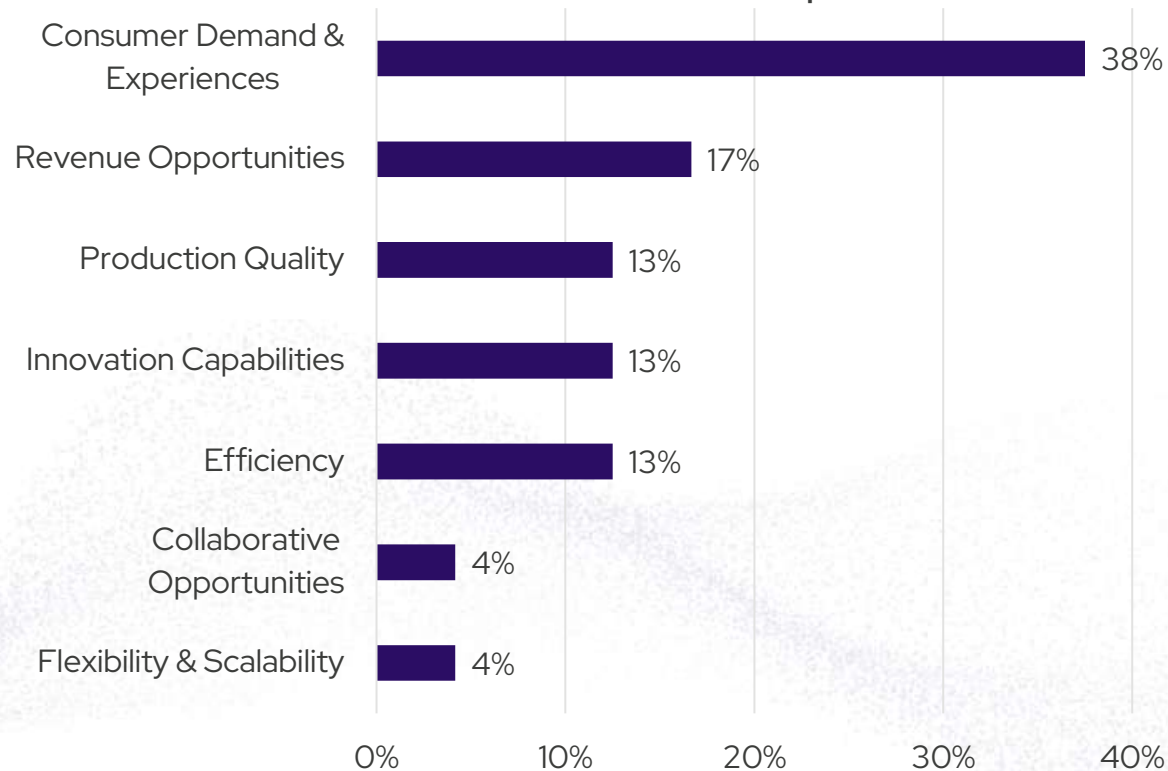
Source: IABM MediaTech Industry Tracker

TechAnalysis – OTT & Streaming

OTT adoption is primarily driven by changing consumer habits



Drivers of OTT adoption



Q. Please select the most important driver of adoption. Base: media/production companies that have already adopted or likely to adopt IP technology. Period: 2025

Source: IABM MediaTech Industry Tracker

Drivers of adoption

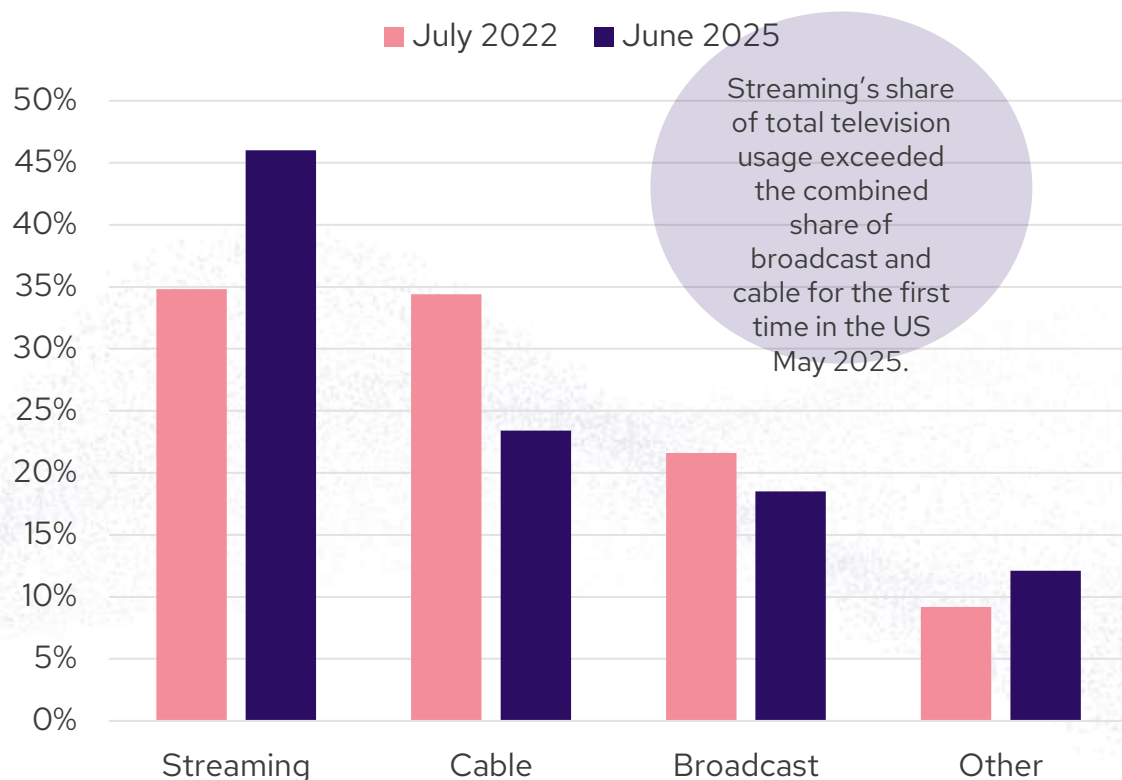
- Changing consumer habits are driving the need for OTT and streaming platforms, as broadcast and media companies are looking for new revenue opportunities and ways to engage with younger audiences.
- Broadcasters and Pay-TV operators are increasingly launching their own streaming channels or partnering with existing streaming services – an example of such an initiative is the recent partnership of French broadcaster TF1 with Netflix.
- These strategies help them reach new audiences, provide better user experience, offer content personalization, and enable multi-platform content delivery.
- OTT is now a mature technology, with about 70% of media and production companies having already adopted it and a low likelihood of new adoption in the next three years, according to IABM's data. We are also witnessing a year-on-year decline of OTT's importance in the industry's technology roadmaps, further indicating trend towards maturity.

TechAnalysis – OTT & Streaming

Streamers are entering the space of national broadcasters with live and local content



Share of total TV consumption, by type in the US



MediaTech Vendor in an IABM Business Intelligence Interview

The OTT service doesn't necessarily have to come through an IP cable, it can also come over the broadcast. From an operational perspective, if you are an IPTV operator or a cable operator, you're typically looking for a unified OTT head end to transform your main distribution mechanism to becoming OTT. But you might have a multicast network, a satellite network or a terrestrial network and you still may want to make use of that. So, you're looking for enablers to use whatever network you've got to carry the OTT services.

MediaTech supplier
(APAC)
(June 2025)

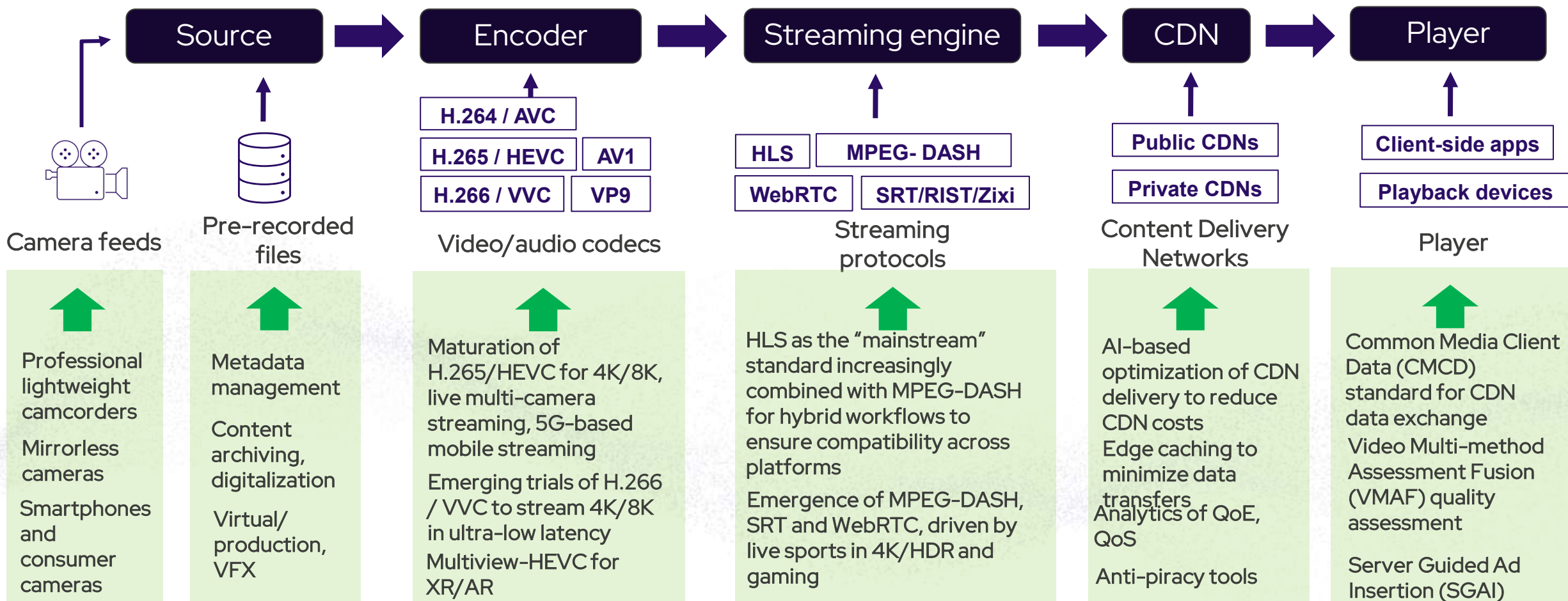
Source: IABM, Nielsen, Company Filings

TechAnalysis – OTT & Streaming

Key trends in the streaming technology supply chain



Key components of streaming supply chain



Source: IABM, Streaming Media Magazine, transloadit.com, dacast.com

TechAnalysis – OTT & Streaming

Viewer engagement and efficiency have driven the adoption of AV1, JPEG-XS and VVC



Trend 1: Open video codecs – AV1 and VP9

The move towards royalty-free open codecs AV1 (by the Alliance for Open Media) and VP9 (by Google) – offering high compression efficiency for 4K and 8K streaming – is driven by major streaming services and hyperscalers investing in high-resolution mobile streaming.

Trend 2: “Lightweight” compression – JPEG-XS

JPEG-XS (by The Joint Photographic Experts Group) – reducing video stream size by transporting visually lossless video – is increasing in popularity among broadcasters after having tested it for the 2024 Paris Olympics and UEFA Euro 2024.. “Lightweight” compression is reducing latency, complexity as well as energy consumption.

Trend 3: Smoothened shift from AVC to VVC

VVC/H.266 codec (by JVET) – designed for 4K/8K streaming, including volumetric and 360°immersive video – is being tested by several broadcasters after its first commercial trials during the 2024 Paris Olympics. The codec is already supported by DVB and ATSC.

Hyperscaler at Streaming Media Connect 2025

Today, we work with three main codecs. VP9 we use for VOD, we use AVC [H.264] for basically legacy devices and we use AV1 for premium encodings. If you have a lot of followship then you’re likely going to get AV1. [...] In 2022, our first big launch of AV1 took place and I’m happy to announced that last week we reached the bar of 50% watch time of VOD platforms on AV1.

Hassene Tmar
Technical Program Manager, Video
Infrastructure
Meta
(March 2025)

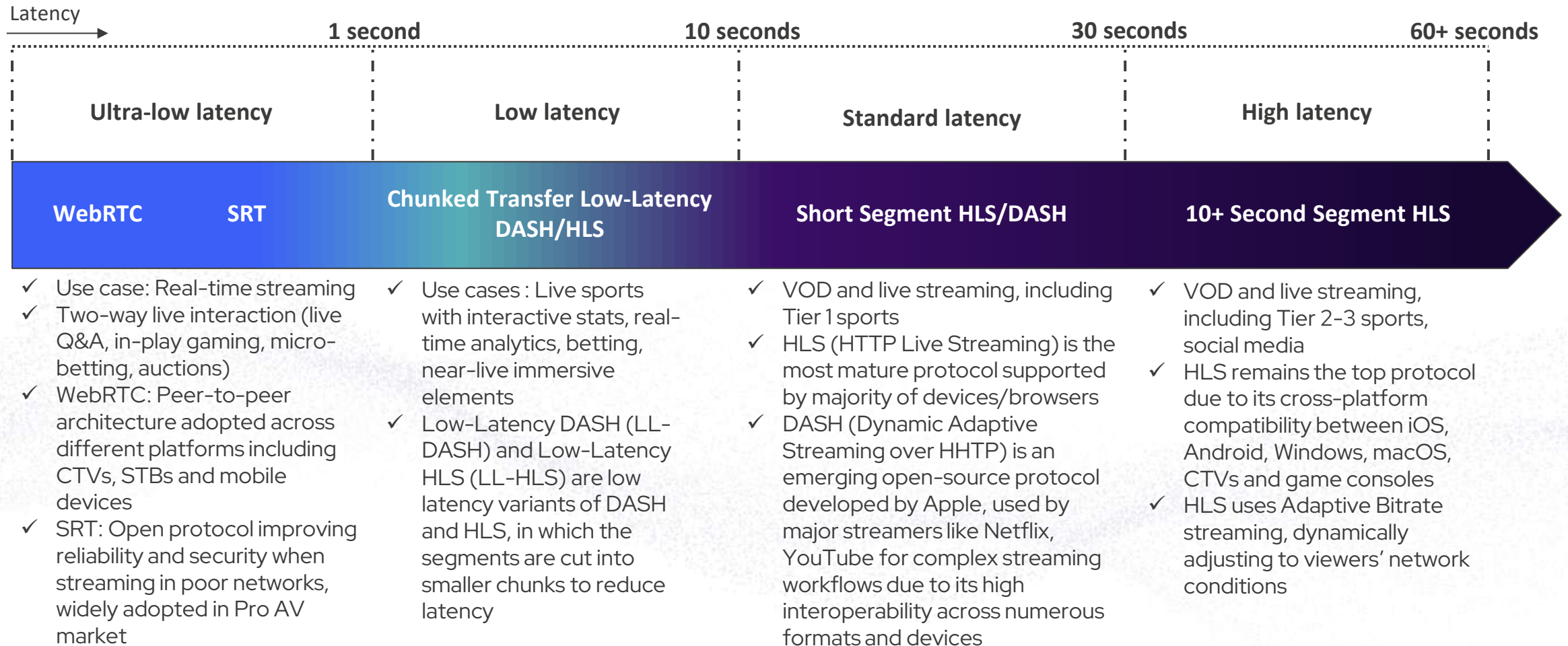
Source: IABM, streamingmedia.com, The Verge, Nokia, Dolby, jpegxs.com

TechAnalysis – OTT & Streaming

Demand for immersive live experiences is fueling development of low-latency protocols



Major streaming protocols by latency



Source: IABM, Dolby, streamshark.io/blog

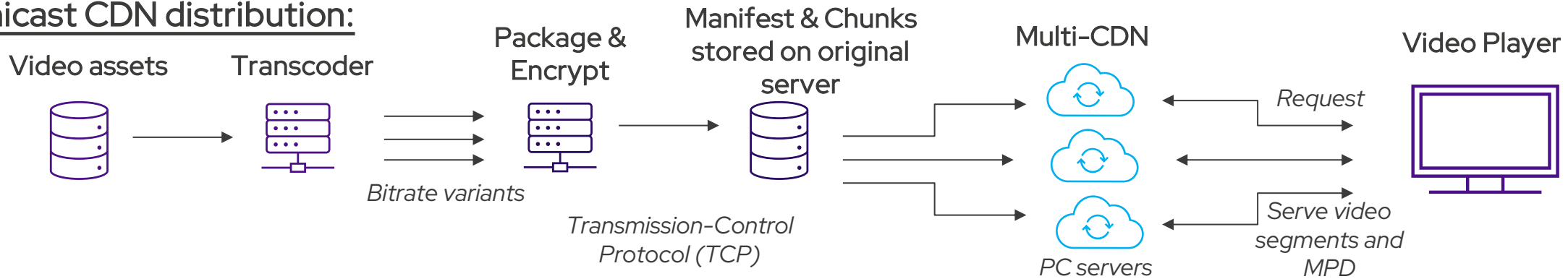
TechAnalysis – OTT & Streaming

Rising CDN costs are driving end-users to consider and test IP Multicast distribution



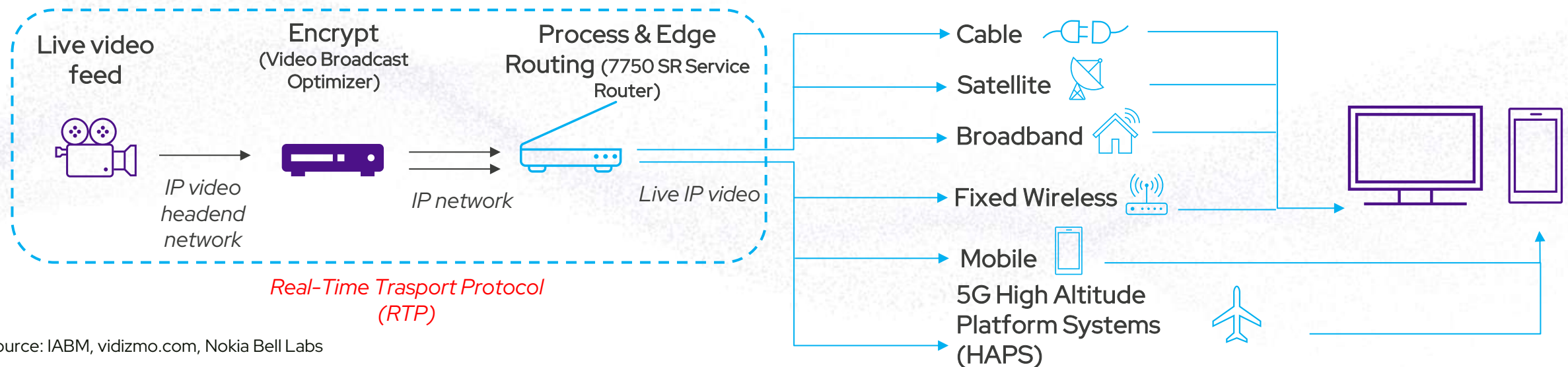
Application layer: HTTP

Unicast CDN distribution:



IP Multicast distribution – Example: Nokia Live CDN

Network layer: IP



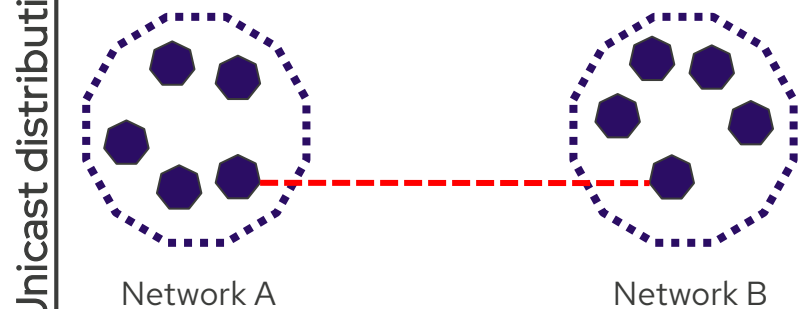
Source: IABM, vidizmo.com, Nokia Bell Labs

TechAnalysis – OTT & Streaming

Bandwidth efficiency, scalability and low latency are driving interest in IP

Multicast

Unicast distribution: Comparison of Unicast and IP Multicast

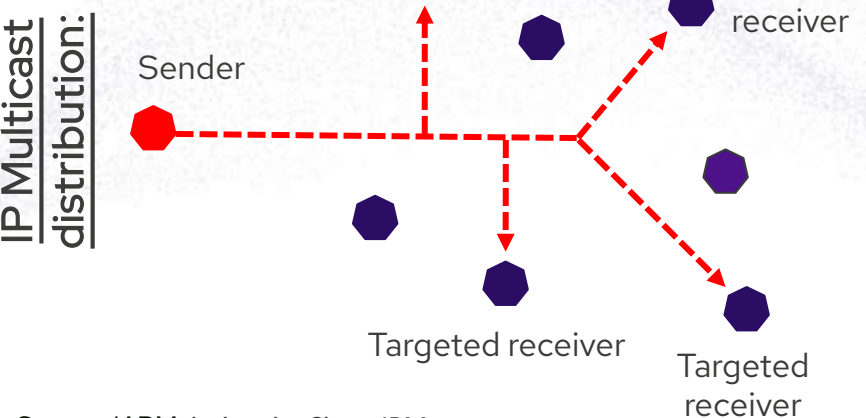


Advantages:

- **Simplicity:** Ease of implementation and management due to the data transfer to one explicit receiver.
- **Acknowledgement of delivery:** Confirmation received from the receiver end, being suitable for Transmission Control Protocol (TCP) connection-oriented communications.
- **Security:** One-to-one communications having better control over the data transfer.

Disadvantages:

- **Inefficiency for group communication:** Each receiver requiring a separate transmission making group communication inefficient.
- **Bandwidth-intensiveness:** In large networks, data sent to multiple receivers individually consumes a lot of bandwidth.
- **Limited scalability:** Peaks in traffic may lead to network congestion and processing loads.



- **Bandwidth efficiency:** Less streams sent across the network at once reduces network congestion and bandwidth usage.
- **Scalability:** Sending the same data to a large number of devices keeps the server load stable despite sudden peaks in traffic.
- **Cost and energy efficiency:** Lower overall expenditure on networks in large-scale events and reduced energy consumption.
- **Lower latency:** Latency remains consistent across all devices, when data is sent out as one data stream.

- **Complexity:** Specialized routing protocols and network infrastructure required for the implementation and management, making it more complex to configure.
- **Reliability concerns:** Lack of guarantee and visibility to the receiver end as IP Multicast uses UDP.
- **Security challenges:** Security risks and unauthorized access are more likely when any device in the multicast group can pick up multicast traffic.

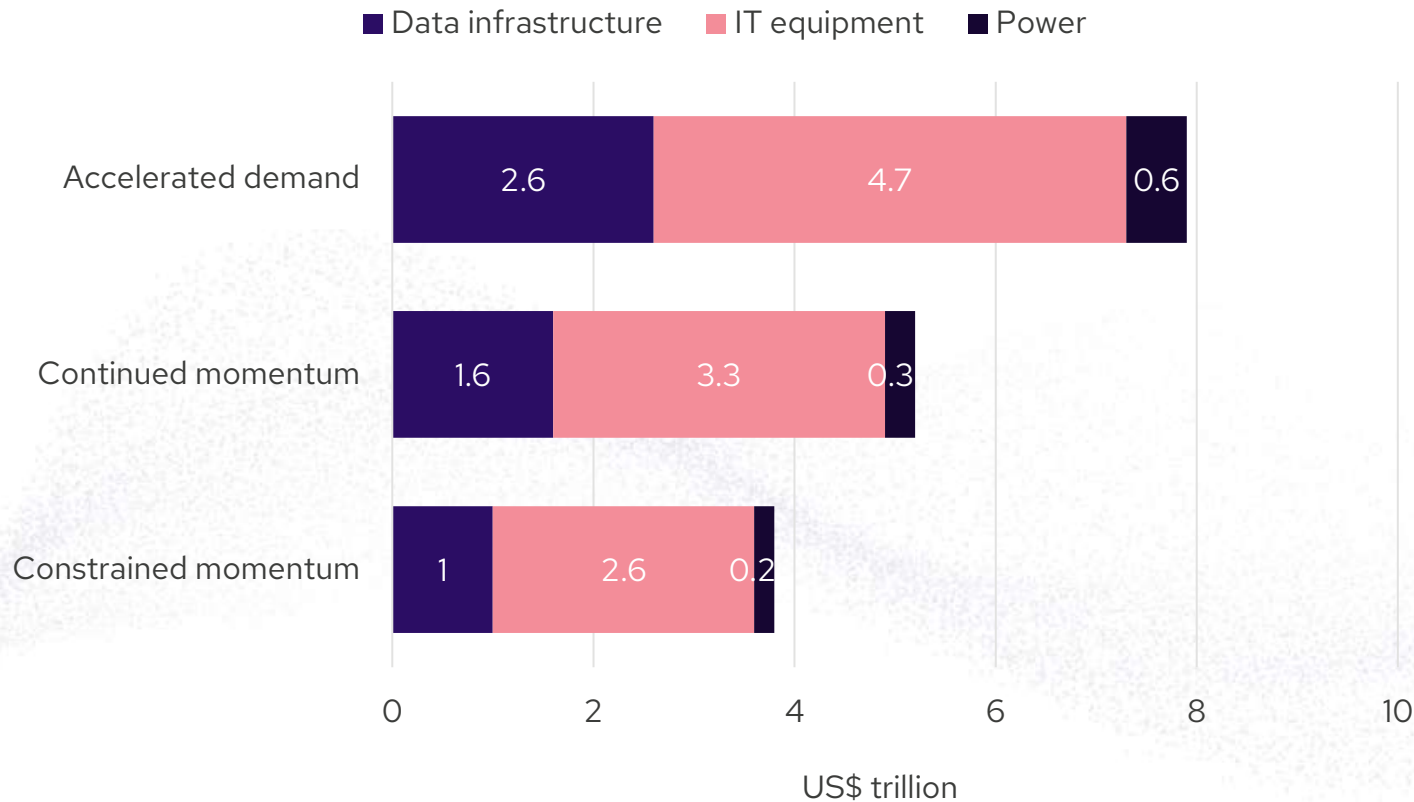
Source: IABM, ioriver.io, Cisco, IBM

TechAnalysis – OTT & Streaming

AI will increase data center capacity demand significantly hurting streamers



Global data center total CapEx driven by AI, by category and by scenario, 2025 – 2030 projection



Source: IABM, McKinsey

MediaTech Vendor in an IABM Business Intelligence Interview

A lot of the streaming industry is heading to the wrong direction. They are literally burning their own cash, because they [media businesses] have no clue about the network element. When they talk about the content delivery network – they only know TCP, HTTP. [...] Data centers are also kicking out video streaming services, because data center costs are higher and higher. That's why the price for the streaming is going up.

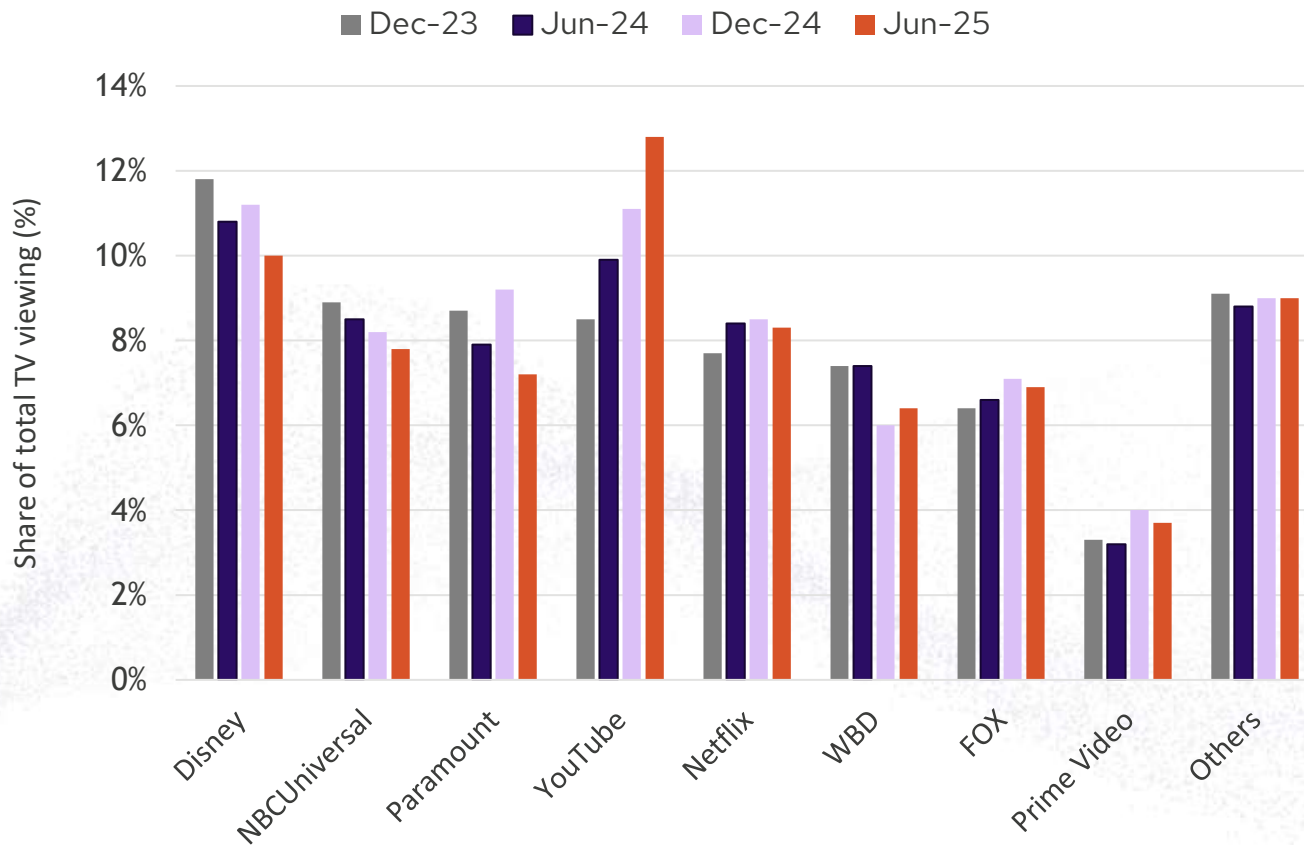
Major B2B Network Infrastructure and Technology Provider
Europe
(July 2025)

TechAnalysis – OTT & Streaming

Server-Guided Ad Insertion is being tested to improve monetization of live streaming



Monthly TV viewing by distributor in the US



MediaTech Vendor in Streaming Media’s webinar

SGAI works in FAST, in live. We have many customers who are testing it for FAST and in live production. The thing we have found is SGAI is a new tech and it’s a risk. It’s great, it has a lot of benefits, but what we’re seeing with our customers is instead of starting with a big live match, they want to run tests in a low-risk environment. [...] What we’re seeing is our users are using FAST channels as a way to test and gain confidence that SGAI works and then move into bigger live events and channels.

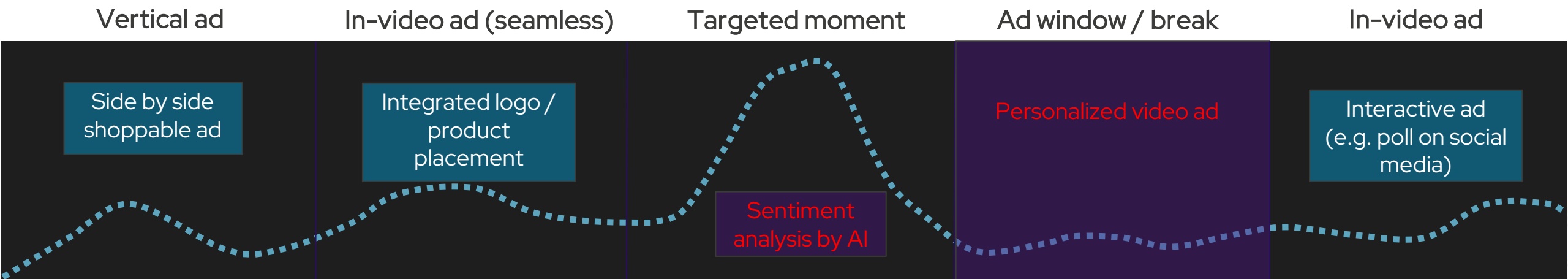
Sourya Roy
Senior Product Manager
Google
(May 2025)

Source: IABM, Nielsen, Streaming Media

TechAnalysis – OTT & Streaming

AI is making emotion-based targeting more seamless, improving viewer experience

- Streaming services – having identified additional revenue streams through ad-supported subscriptions – are investing in hyper-personalization and addressing the need for individual ad experiences. The development of their own in-house ad platforms (e.g. Netflix), is giving streamers control over their own ad stack, features and analytics, allowing the use of AI and computer vision-based emotional targeting.



Seamless ad targeting in VOD streaming – Example



Source: IABM, Google, ABC News – The Walt Disney Company, Blinder Artists, Deadline, Britannica

TechAnalysis – Remote Production

Deep dive into recent trends Remote Production and related technologies

TechAnalysis – Remote Production

IP networking is driving a major shift in Create and Produce, favoring distributed teams



MediaTech Focus by Content Chain Segment in Remote Production

Create

Media businesses, sports leagues as well as non-media customers such as houses of worship are investing in remotely controlled, easy to use PTZ cameras which enable users to create and stream broadcast-quality content in full HD and 4K. The significant reduction of on-site crew requirements and the shift towards single operators is favoring lightweight cameras with AI-tracking.

Produce

Cloud-based collaboration platforms are becoming crucial for distributed teams, bridging production and post-production, and centralizing all workflows from cloud-based editing platforms to new compression standards, accelerating deployment and enabling more diverse scheduling of top creatives. This shortens turnaround times and time to market of content.

Manage

Cloud-based MAMs enable remote access to collaborative browser-based tools and AI-driven metadata enrichment. These enable efficient access to historic footage and content libraries, which are increasingly used for clips, stats and engagement in live sports.

Publish

The adoption of IP and the use of cloud in remote productions are increasing flexibility and scalability (e.g. adding super slow-motion camera replays). Improving connectivity in various locations means they have large bandwidth pipes available, enabling “direct connect” bandwidth to the cloud data center. This enables high quality remote productions.

Monetize / Consume

Low latency streaming protocols and advanced compression standards like JPEG XS are enabling low latency and high video quality.

Support

AI-driven real-time video monitoring solutions are enabling media businesses to anticipate risks of failure and provide a holistic view of the whole end-to-end content supply chain. AI is increasingly providing insights and recommendations to remote teams.

Store/Connect

Hybrid and live cloud production setups in remote production enable optimizing the use of cloud infrastructure, reducing cloud-related costs. IP networking and open source IP standards are enabling access to high-end remote productions for smaller teams.

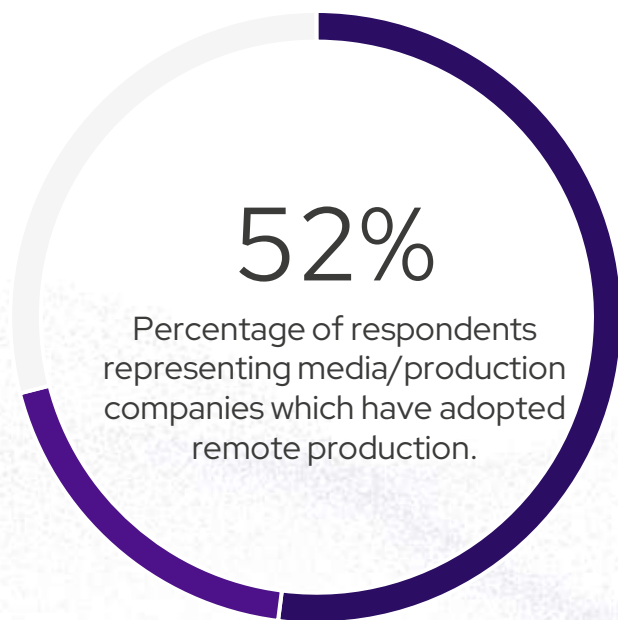
Source: IABM

TechAnalysis – Remote Production

Remote production is primarily applied in content production

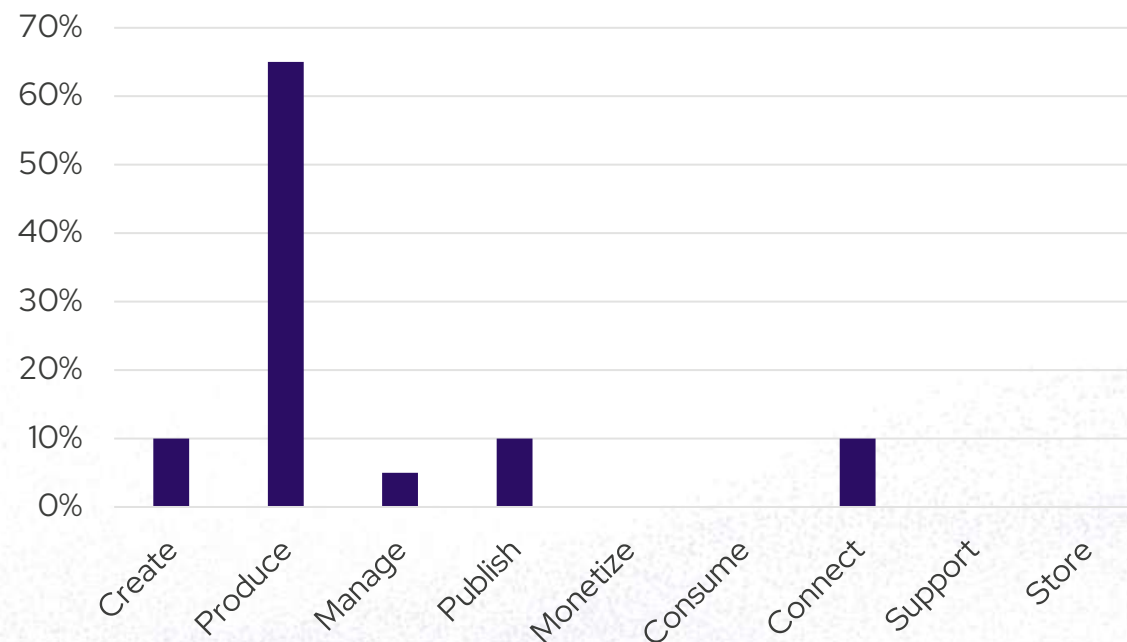


Remote Production



■ Have already adopted ■ Likely to adopt ■ Other

Remote production adoption across content supply chain (primary segment)



Q: Which of the following technologies has your organization already adopted? / Which of these technologies is your organization likely to adopt in the next three years? Period: 2025 Base: Media/production companies (n=62)

Q: In which of the following content supply chain segments have you adopted/are you most likely to adopt remote production? Single response. Period: 2025 Base: have already adopted or are likely to adopt IP technology (n=20)

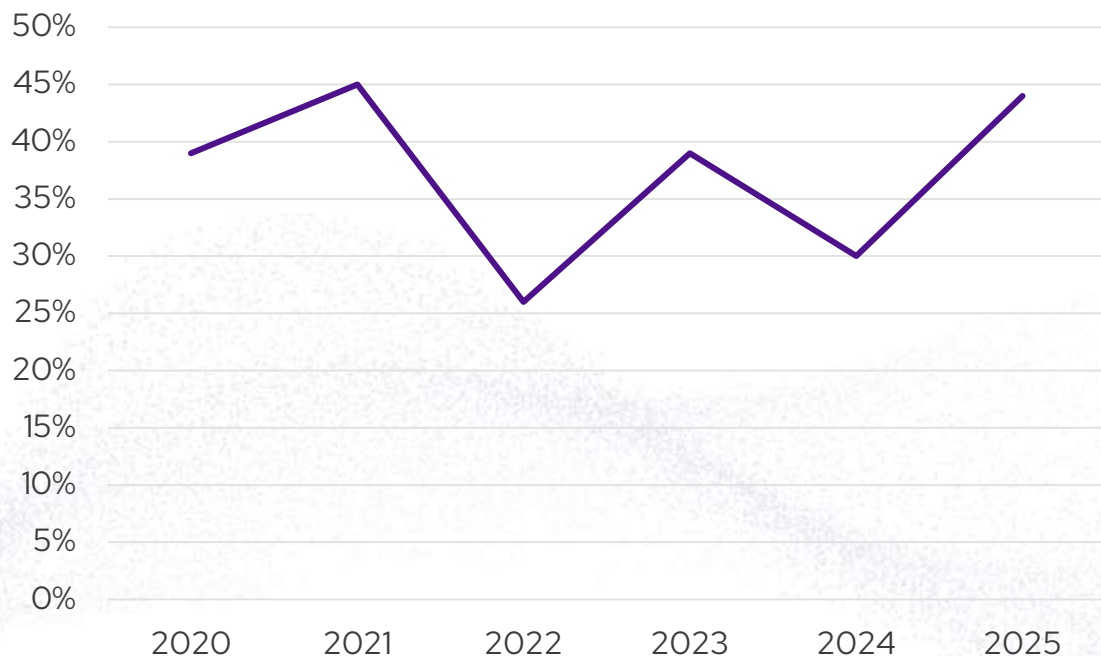
Source: IABM MediaTech Industry Tracker

TechAnalysis – Remote Production

Remote production saw a rapid rise in importance in 2025

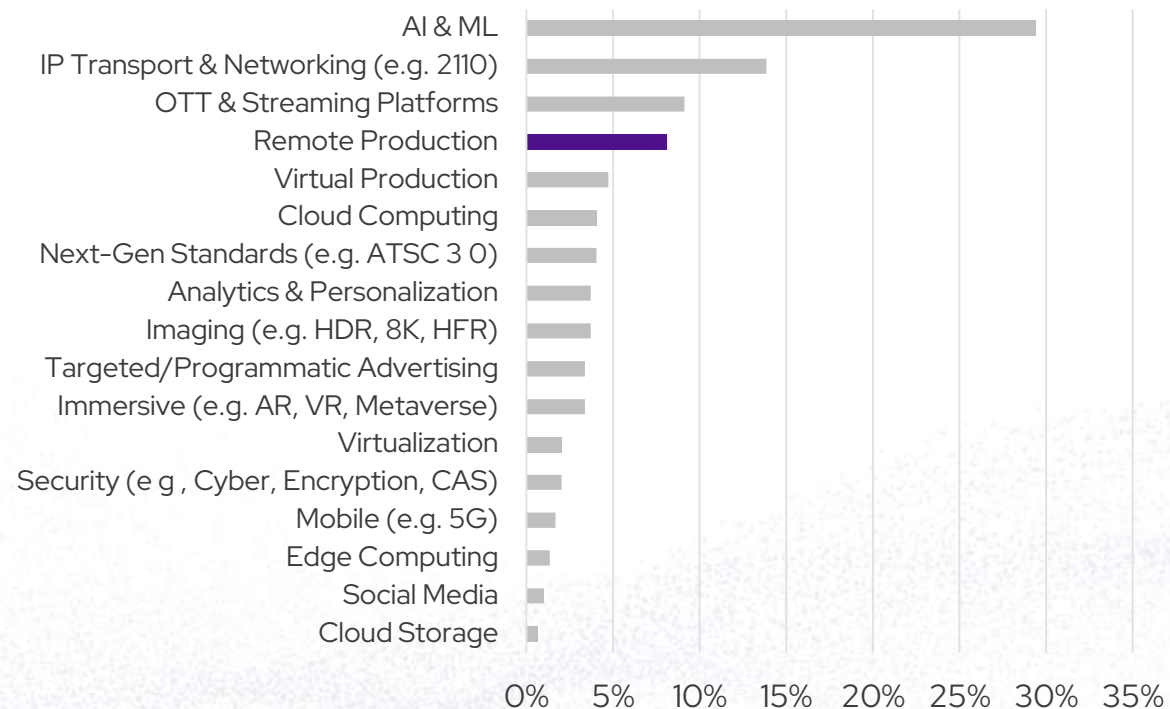


Importance of Remote Production in technology roadmaps



Q. What are the most important trends in your organization's technology roadmap? (All that apply)
Base: All industry. Note: was "At-Home/Remote Production in 2020-2024"

Most important priority



Q. Please choose the most important trend in your organization's technology roadmap. (Single response)
Base: All industry, 2025, n=296.

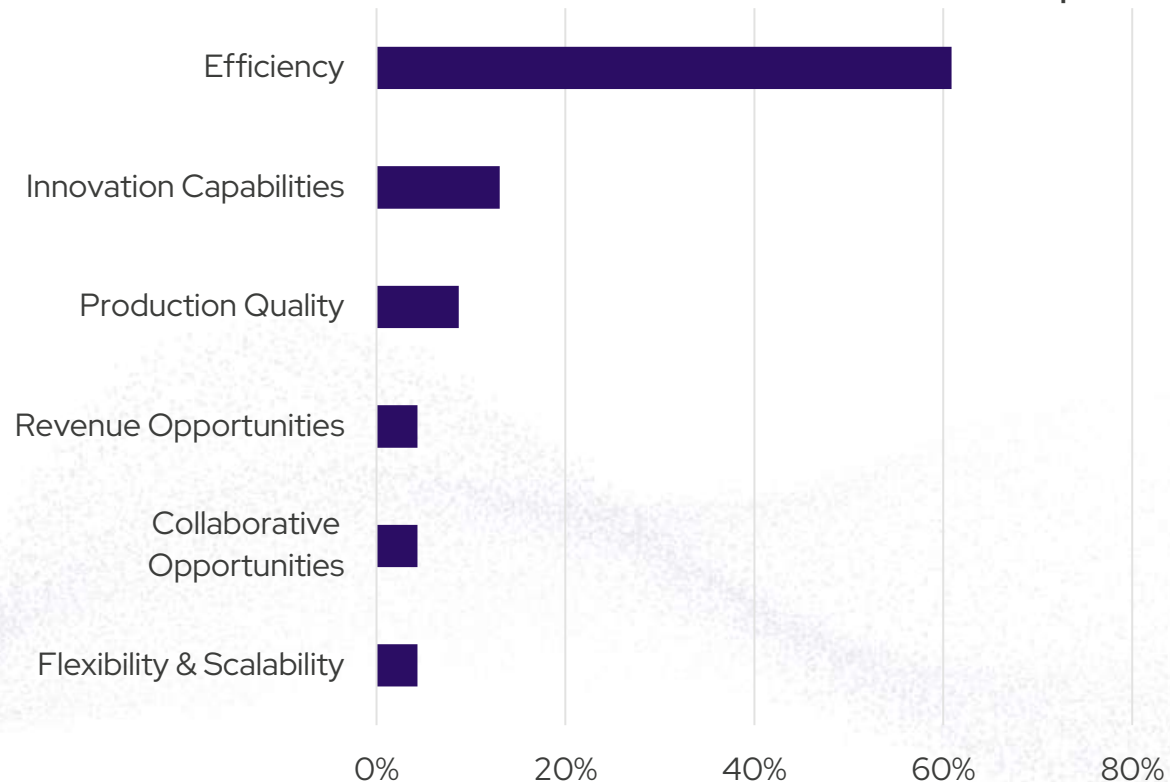
Source: IABM MediaTech Industry Tracker

TechAnalysis – Remote Production

Adoption of remote production is driven by the need for efficiency



Drivers of Remote Production adoption



Q. Please select the most important driver of adoption. Base: media/production companies that have already adopted or likely to adopt IP technology. Period: 2025

Source: IABM MediaTech Industry Tracker

Drivers of adoption

- Remote production has been adopted by 52% of media organizations and still has significant potential for investment, with nearly one-fifth of media companies in IABM's MediaTech Industry Tracker indicating they plan to adopt this technology in the next three years.
- This investment is driven by the need for efficiency, as remote production allows broadcast teams to work from centralized locations—dramatically reducing travel, lodging, and equipment costs while maintaining broadcast-quality content delivery.
- Advanced compression standards (e.g. JPEG XS), IP-based workflows, and cloud infrastructure, when used in combination, support low-latency, high-quality remote production, ensuring quality isn't compromised despite geographically distributed teams.
- Remote production also contributes to sustainability by lowering the carbon footprint associated with travel and on-site hardware deployment. However, remote production workflows in broadcast and media increase vulnerabilities to cyber threats, especially when handling high-value live sports content, which drives investment in security technology.

TechAnalysis – Remote Production

Demand for live events and niche sports is driving demand for REMI productions at lower cost

Key drivers of Remote Production

Efficiency & Cost savings

The skyrocketing costs of media rights are leading media businesses to focus on long-term contracts for Tier 1 events, justifying higher upfront investment and longer payback periods through the savings made with remote production. These efficiencies can also open up more opportunities for tier 3 coverage.

MediaTech Vendors in the Broadcast Bridge interview



Remote production is mostly related to long-term rights contracts, because without having the rights for a certain period, it doesn't make sense for the service provider. With remote production there is a certain investment in the beginning, and it needs to pay off during the rights period. These long-term contracts are mostly related to second and third tier leagues.

Rainer Kampe
CTO at Broadcast Solutions (February 2025)

Scale & Content diversity

Reducing the travel of production teams is enabling staff to work more fixtures from centralized production hubs or remote from home, increasing the overall production output and the work life balance of the staff.



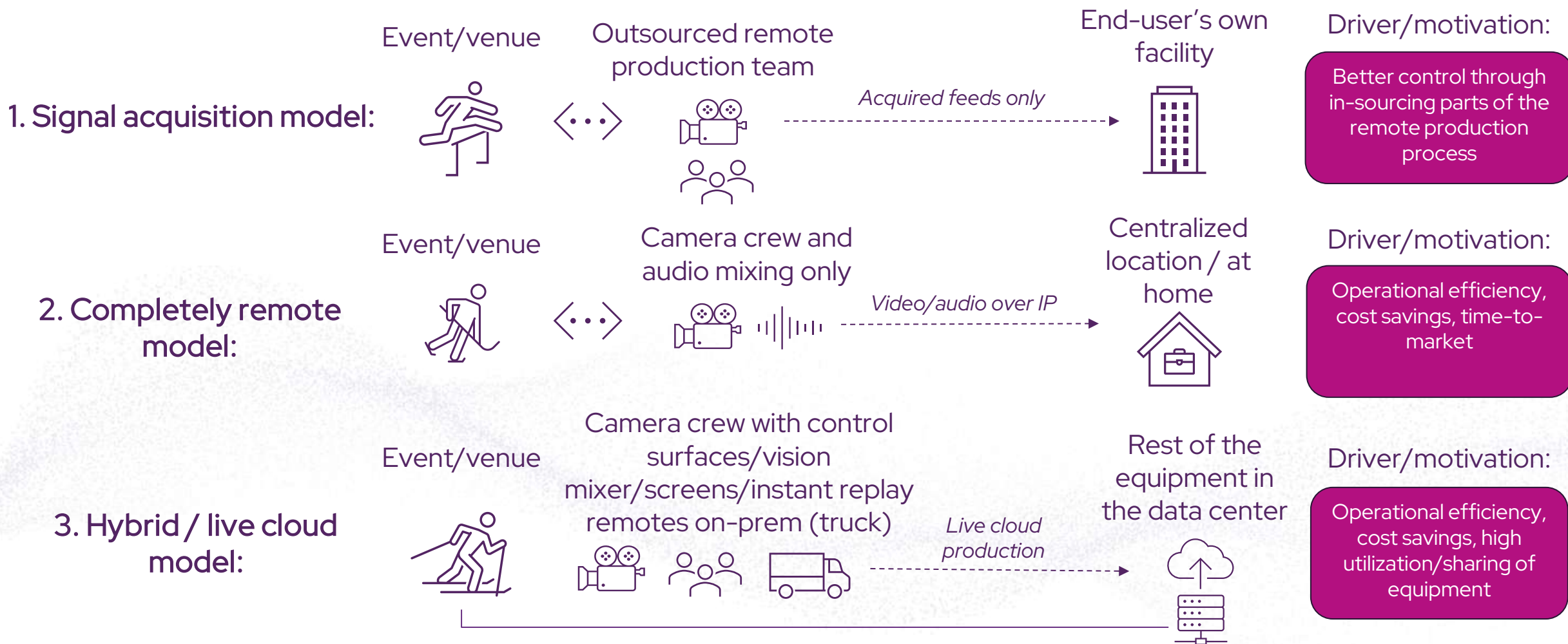
The determining factor comes down to scale. With some live productions, doing things remotely provides cost savings. If we're not traveling people, they're able to work on two shows per week instead of one show. That all helps the client and the bottom line. [...] We can have a producer not spend three travel days, but be able to go to one place and one show per day – that's an efficiency.

Dan Turk
CTO at NEP Americas (February 2025)

Source: IABM, thebroadcastbridge.com

TechAnalysis – Remote Production

Hybrid model is enabling higher utilization of equipment and creative resources



Source: IABM, TM Broadcast International #141 (May 2025), thebroadcastbridge.com

TechAnalysis – Remote Production

Feasibility of remote production is determined case by case based on connectivity



Connection options for Remote Production

Point-to-point fiber

Point-to-point fiber connection ensures the highest quality, even though it also involves a higher cost. For example, in Nordic countries fiber connectivity is reliable and affordable compared to regions with a lot of outages and fiber cuts.

Fiber-to-the-home (FTTH)

Traditional fiber optic connections offer a good cost-quality ratio as well as an option to prioritize traffic to guarantee reliable performance.

4G/5G:

The increasing use of mobile equipment such as wireless transmission backpacks is reducing costs and increasing flexibility in production, when compatible with satellite and WiFi.

Digital Satellite News Gathering (DSNG):

In satellite-dominant regions such as Latin America, DSNG remains a relevant connection option for remote production.

MediaTech Vendor in a Broadcast Bridge interview

There are a lot of locations where there is a connectivity provider active, where we could be backhauling signals for REMI on SDI, over a managed network service or leased line that has a very high level of predictability of performance. [...] For a connected production with a hybrid setup, or a fully remote production, we normally have a 10 or 100 gig network. More often, we have a 10 gig network at the location so we will be using something like JPEG-XS compression. In other locations where we have lower bandwidth available, we could use more lossy encoding and something like SRT or other options.

John Guntenaar
CTO
NEP Europe
(June 2025)

Source: IABM, TM Broadcast International #141 (May 2025), thebroadcastbridge.com

TechAnalysis – Remote Production

Hybrid live cloud production is emerging in Tier 1 sports, enabling engagement at scale



We are doing full cloud production and really a lot of that is international stuff at scale. For productions, announcers are onsite, cutting it [live video] in the cloud and distribution is through cloud services. [...] It allows us to do more fun things onsite.

Jason Hedgcock
Senior Director, Technical
Production & Special
Projects
MLB

In Paris Olympics, we were able to double our ingest capacity for primary asset management systems only for 17 days. It was a game changer and let us do everything.

Jim Miles
Senior Director, Live Event
Workflows
NBC Sports & Olympics

We have four working cloud production control rooms already online in Atlanta and we just launched one in New York. Right now, we are using them as a sort of inauguration room, but it's working extremely well.

Jeff Norman
Director of Production
Technology
Warner Bros. Discovery

We've done a lot game broadcast on a regular season. [...] It is really an interesting time for the business, because it changes the revenue possibilities of your sport and makes it a global thing.

Grant Nodine
SVP, Technology
NHL

The PGA Tour is doing every shot live from the cloud with 80 cameras coming into the cloud, producing 36 unique program feeds powered by 50 operators across two different contents. That's the type of horizontal scale that cloud enables you to get into.

Bryan Samis
Specialist Solutions
Architect
AWS



Source: IABM, SVG Cloud Production Forum 2025

TechAnalysis – Remote Production

Hybrid live cloud production is emerging in Tier 1 sports, enabling engagement at scale



Risk & Challenges

Connectivity:

Remote production – especially the complete REMI model – is associated with a higher risk of failure due to different levels of connectivity in different countries. For example, in the US, distances are long, there are a lot of outages, fiber cuts and different companies to be crossed in a remote production setup. Typically, disaster recovery is fixed by a managed service. As a result, remote production technology vendors are using routing and static dark fibers to manage the risk of failure.

Remote technical teams:

Minimizing senior technical personnel onsite and shifting to software-defined solutions is increasing the risk of failure. Therefore, many broadcasters are now using AI-driven intelligent network monitoring and observability platforms to anticipate risks through proactive, real-time monitoring as well as relying on remote on-demand engineering support.

Latency:

The shift from legacy satellite transport to fiber transport methods has reduced latency significantly. The emergence of ultra-low latency codecs like JPEG-XS and HEVC ULL and advances in high-bandwidth IP transport and purpose-built IP networks is translating into notable reduction in latency, enabling less risky remote production setups in premium live events.

MediaTech Vendor in a Newscast Studio interview

Connectivity is becoming available to everyone at a lower price. This trend makes remote production more appealing for broadcasters, allowing them to save on travel costs and re-use equipment where they couldn't before.

Ciro Noronha
President of RIST Forum
(January 2025)

Source: IABM, newscaststudio.com