



IABM INDUSTRY IMPACT BRIEFING

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Research Methodology

This report was prepared using a hybrid research approach

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

Primary Research

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

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

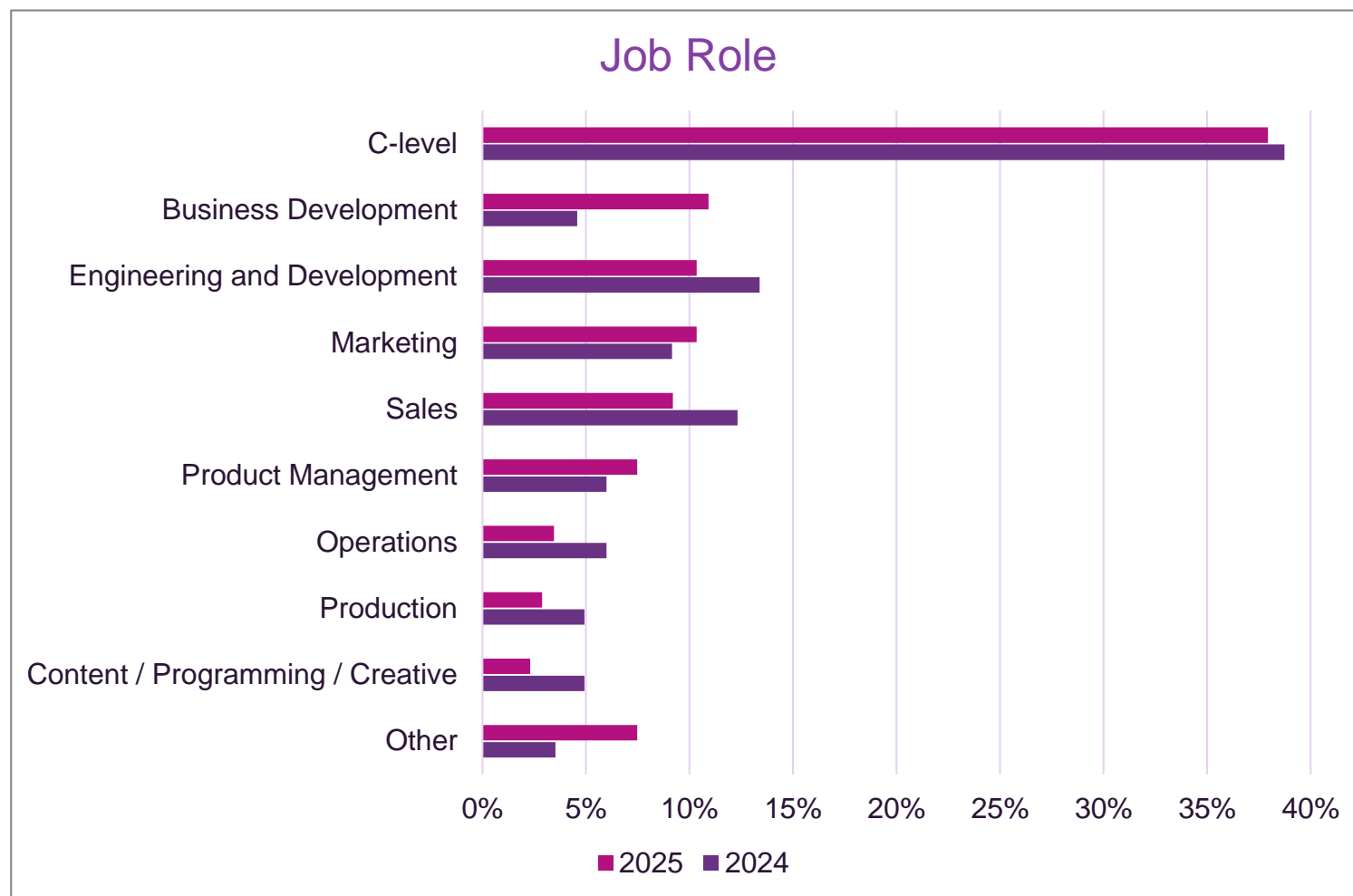
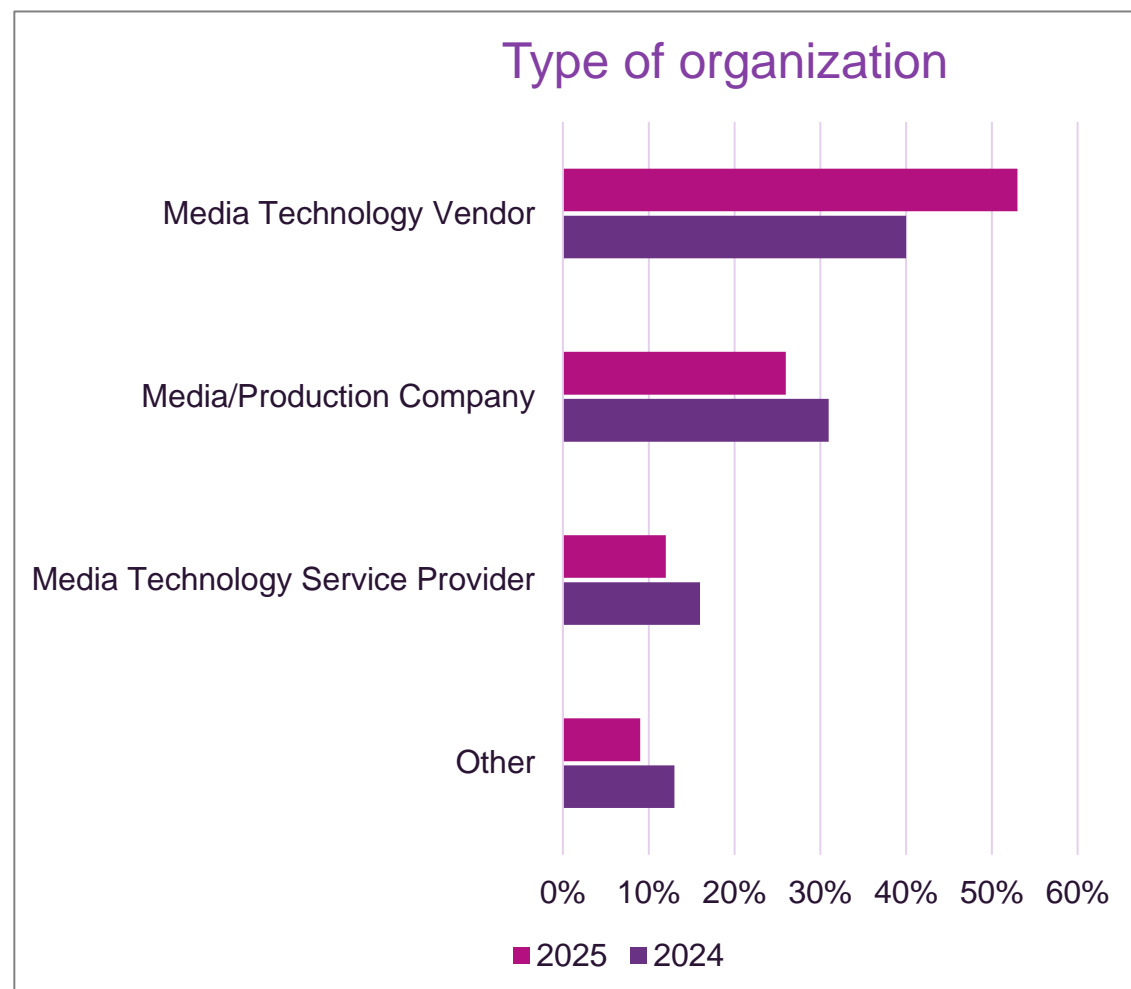
Secondary Research

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

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

MediaTech Industry Tracker

Survey includes organizations of all types, with almost 40% of respondents at C-level



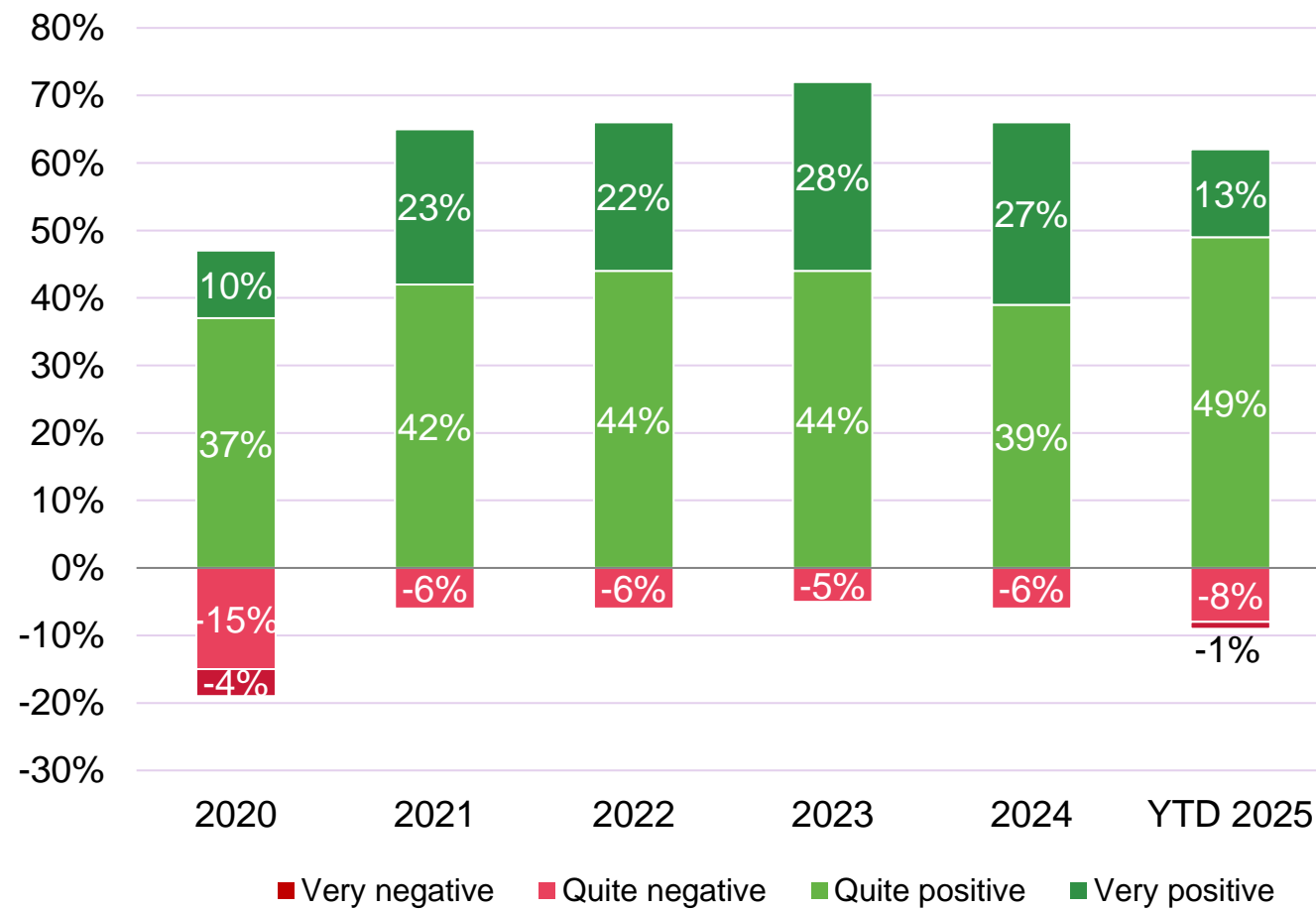
The “Other” category includes: Consulting, Corporate, Education/Training, Freelancing, Government/Military, Sports, Marketing/Advertising Agencies, Healthcare, Live Music

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

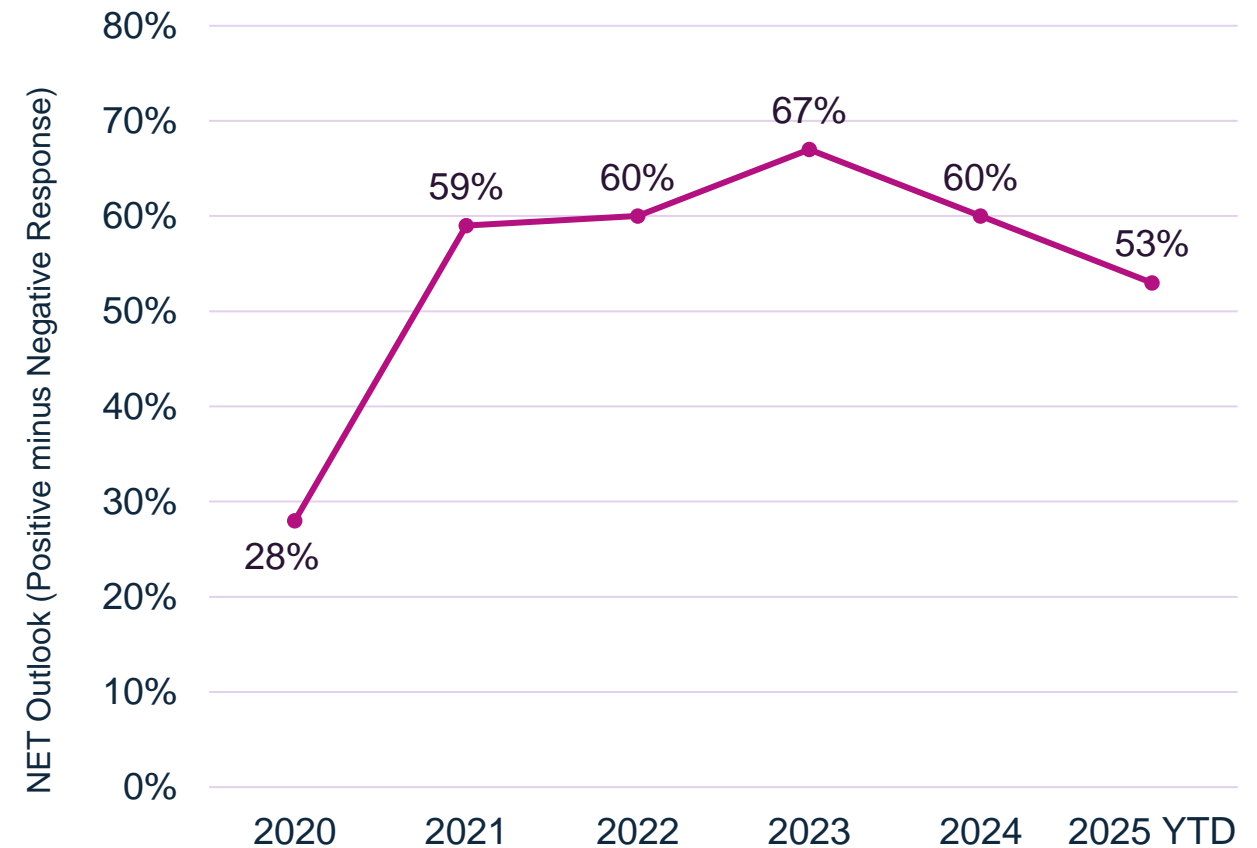
Business Environment

The business environment outlook has deteriorated slightly since last year

MediaTech Business Environment Outlook



MediaTech Business Environment NET Outlook



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

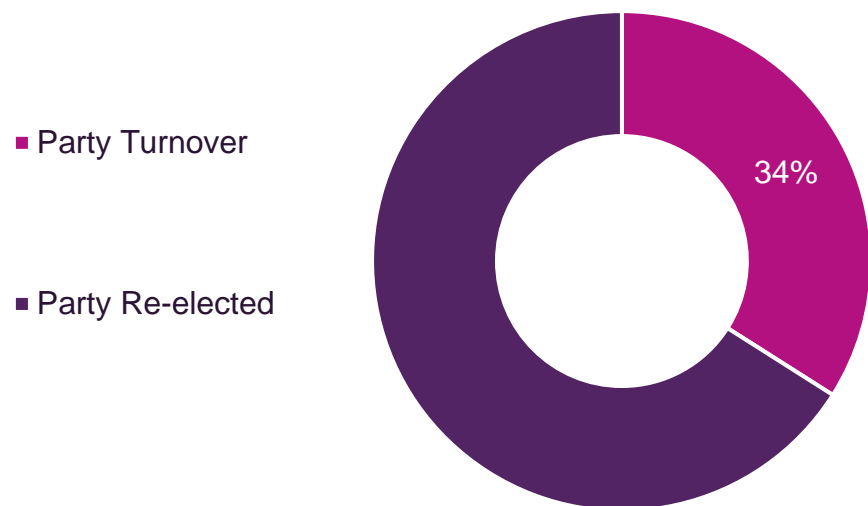
Business Environment

2024 election “super-cycle” leads to significant turnover in global leadership

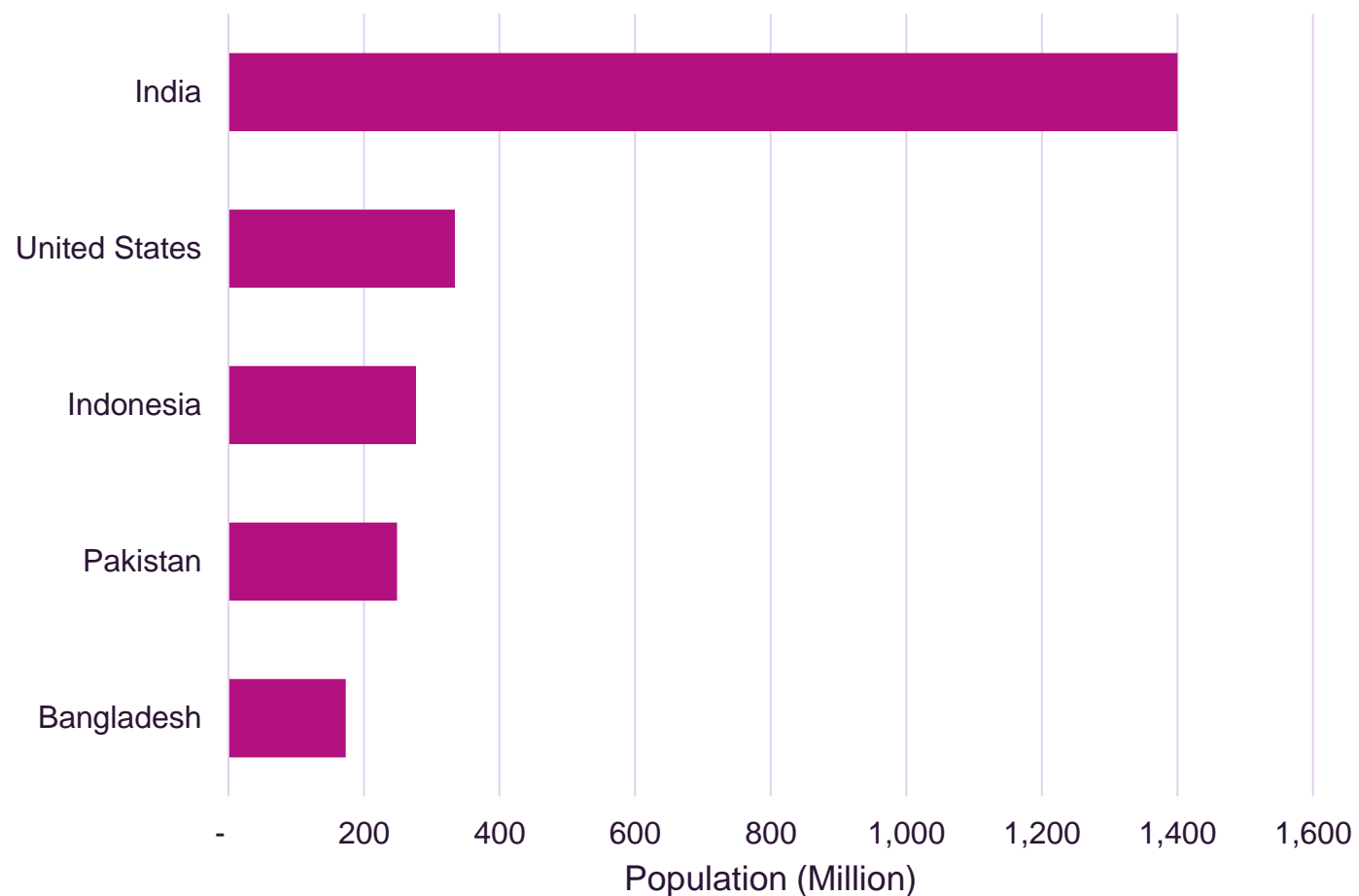
74

National elections successfully took place worldwide in 2024 as more democratic processes aligned in a single year than ever before.

Party Turnover at 2024 National Elections



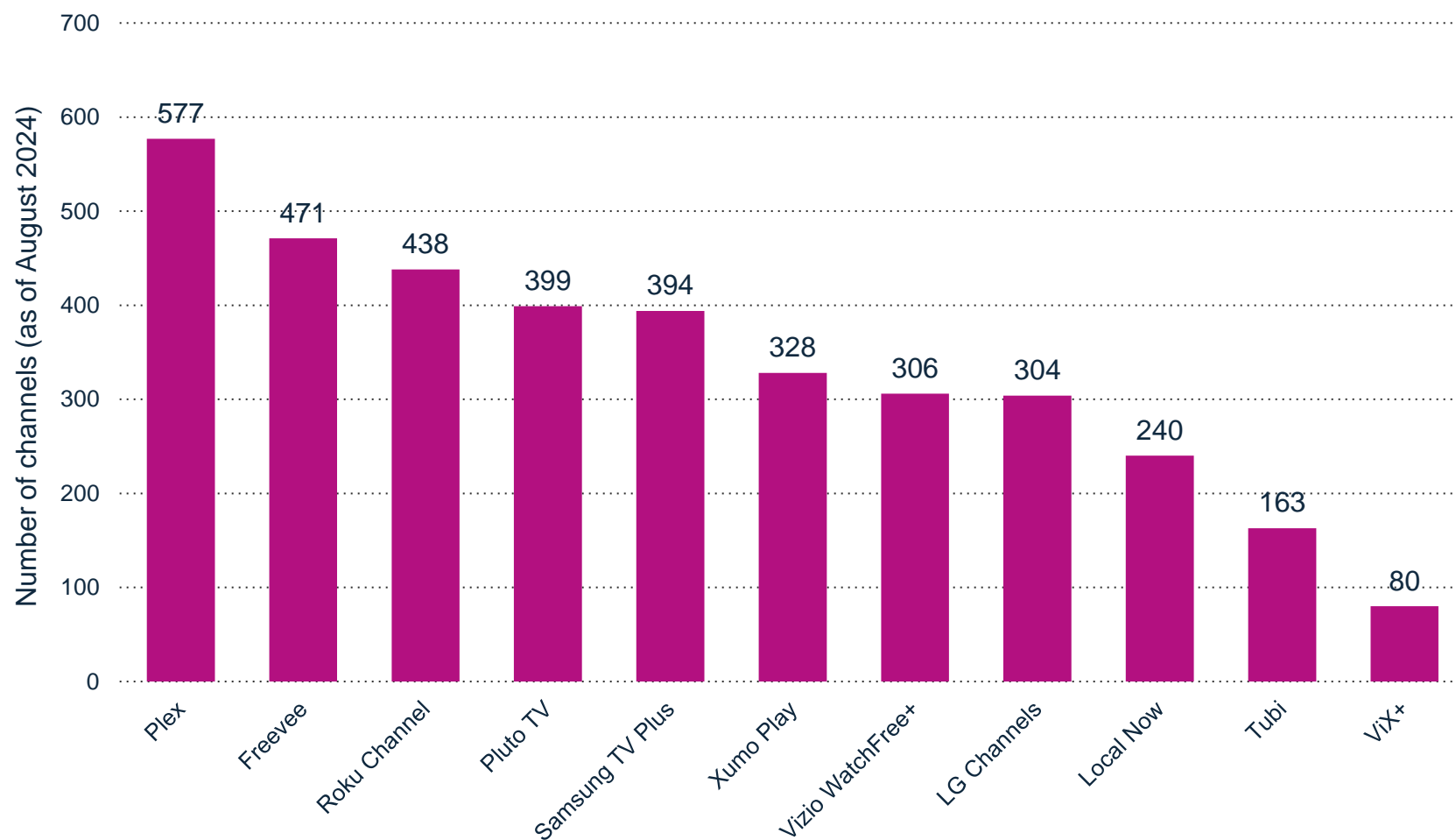
Top 5 Most Populous Countries Holding National Elections in 2024



Business Environment

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

Total Number of Channels on Selected Free Ad-Supported Streaming TV Platforms (USA)



FAST Channels Proliferate

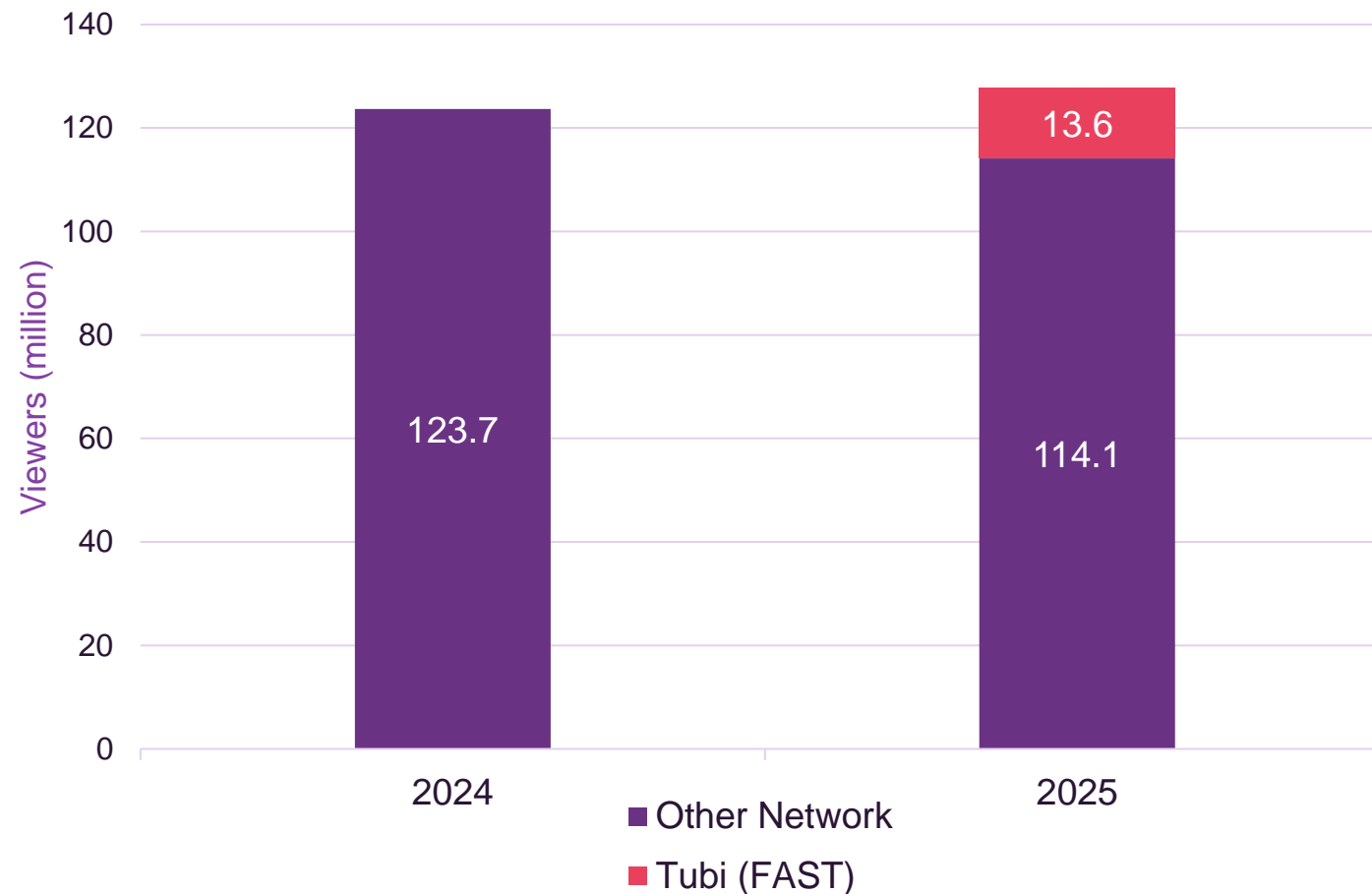
Reintroducing the lean-back experience of linear as FAST channels has given viewers an alternative to the decision-making paralysis of choosing what to watch on-demand.

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

Business Environment

Superbowl is available free to air on FAST for the first time

Annual Superbowl Viewership



Superbowl debuts on FAST

Tubi adds an additional 13.6m viewers to the Superbowl audience total in 2025

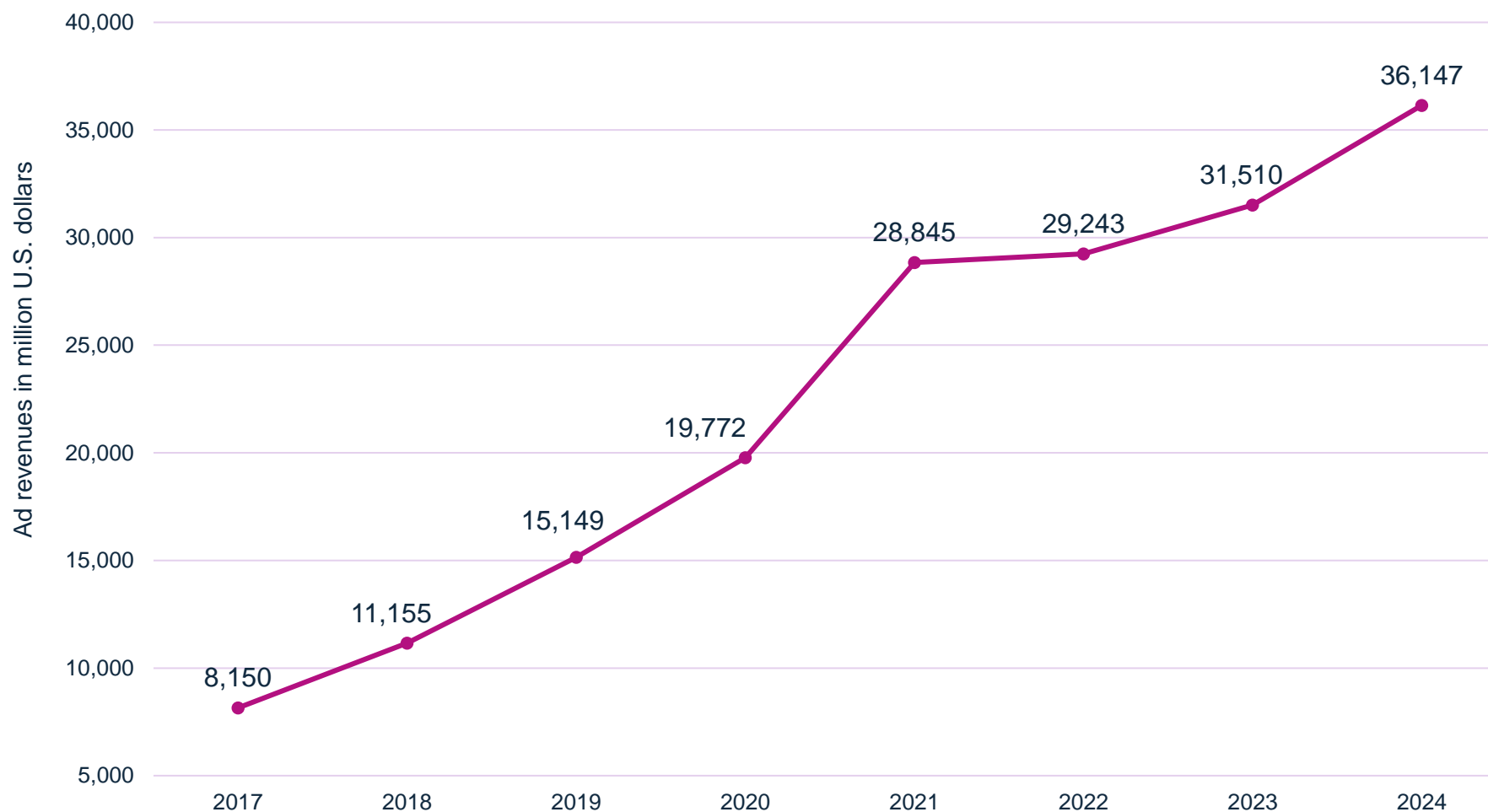
Available across FOX, FOX Deportes, Telemundo, and Tubi, Super Bowl LIX drew a total audience of 127.7million.

Tubi accounted for 11% of the total audiences and supported overall YoY growth by 3.2%

Business Environment

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

YouTube Annual Ad-Revenue



90B

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



\$18.5B

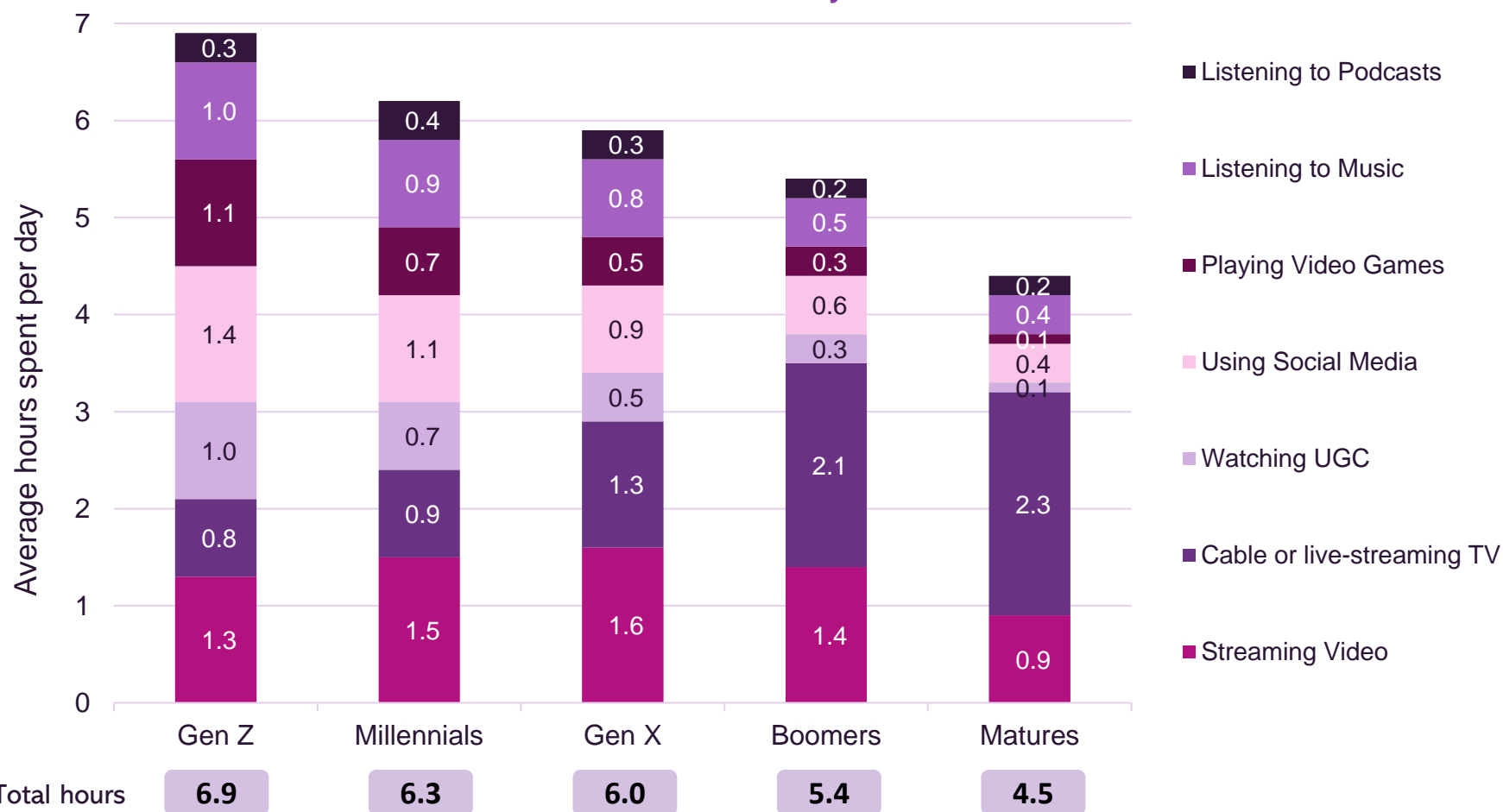
Ad revenue earned by TikTok in 2024



Business Environment

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

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



New Habits Grow Total Daily Average Hour

Average daily media consumption increases by generation. Time spent playing video games accounts for the greatest increase between Gen Z and Millennials.

Gen X, Boomers, Matures

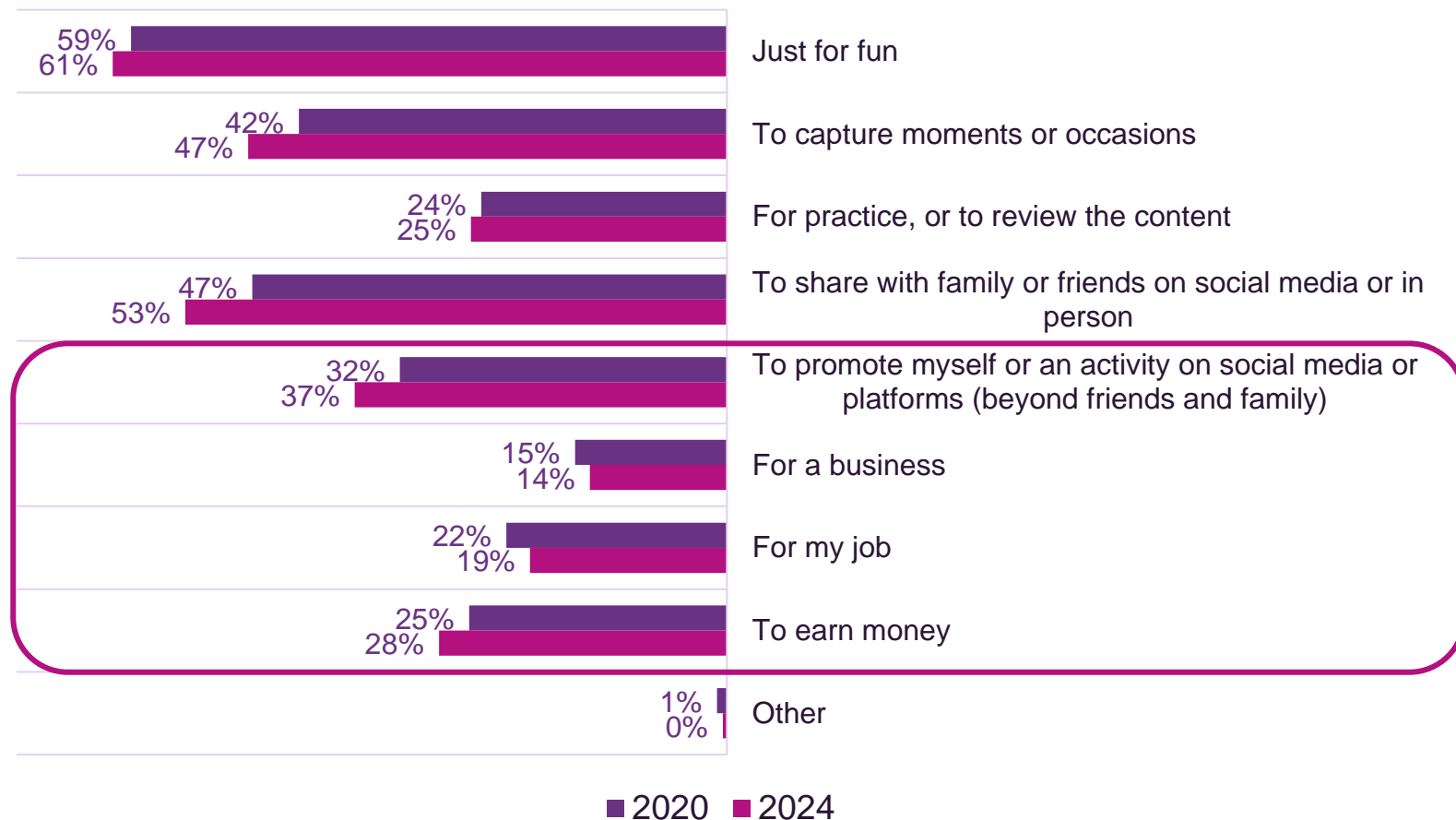
Older generations watch more video on average per day in total across platforms.

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

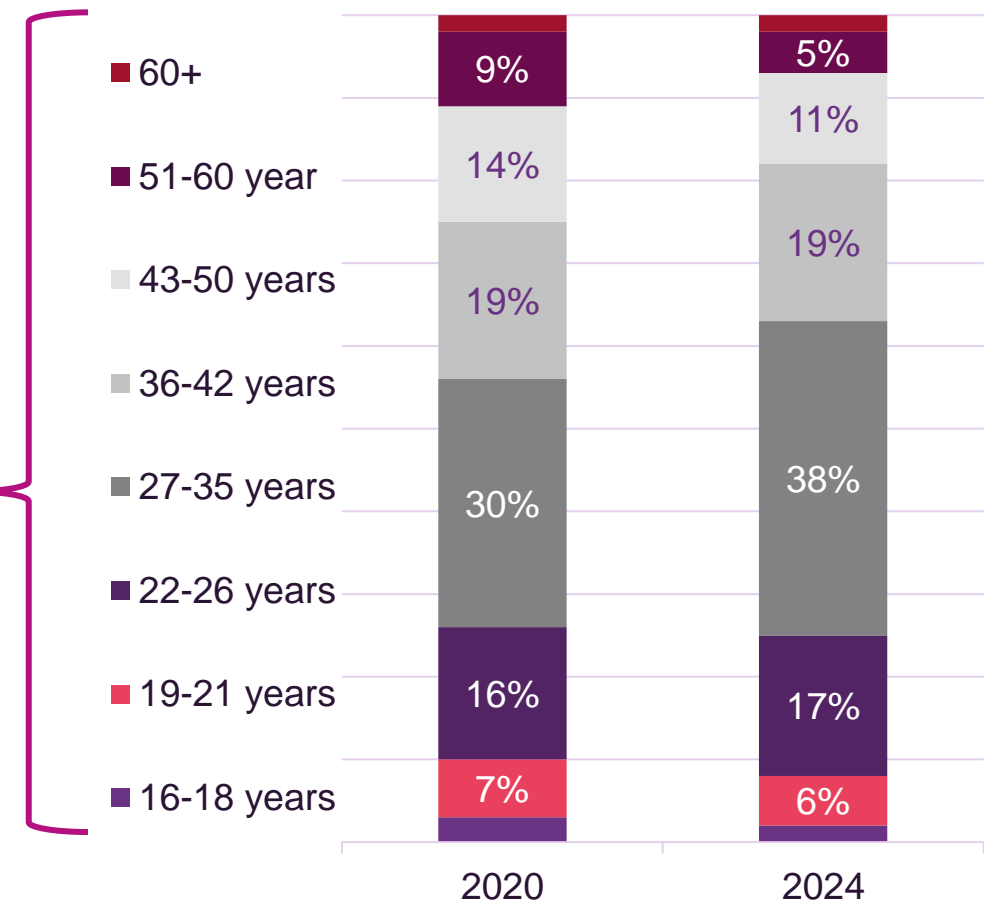
Business Environment

Futuresource reports a video creator population of 95.9m worldwide

Creators' reasons to create stream or edit videos



“Professional” content creators by age range

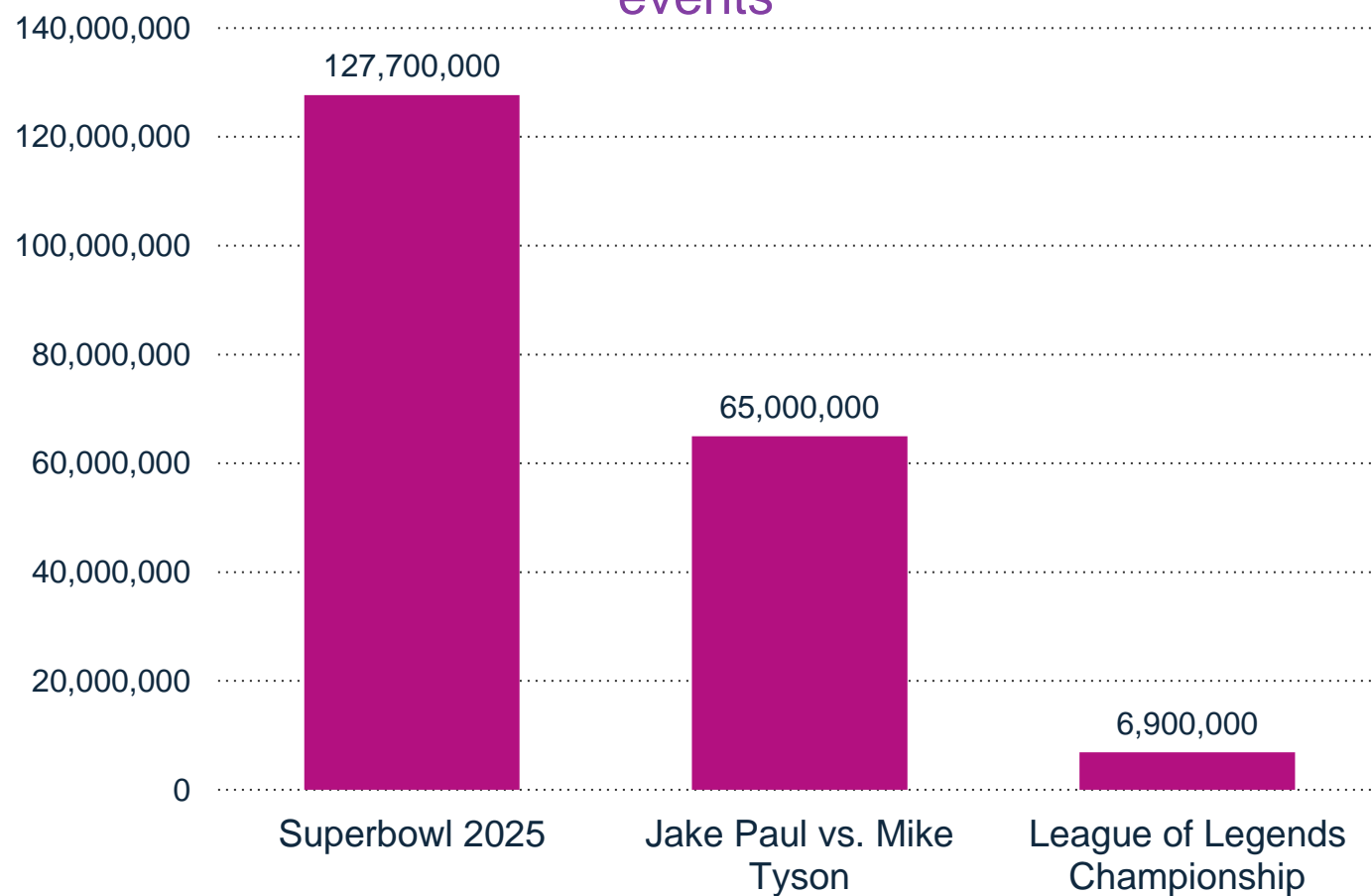


Q. Why do you create stream or edit videos? (2020 n=17270; 2024 n=16,663)
 Primary research was conducted in eight selected countries,

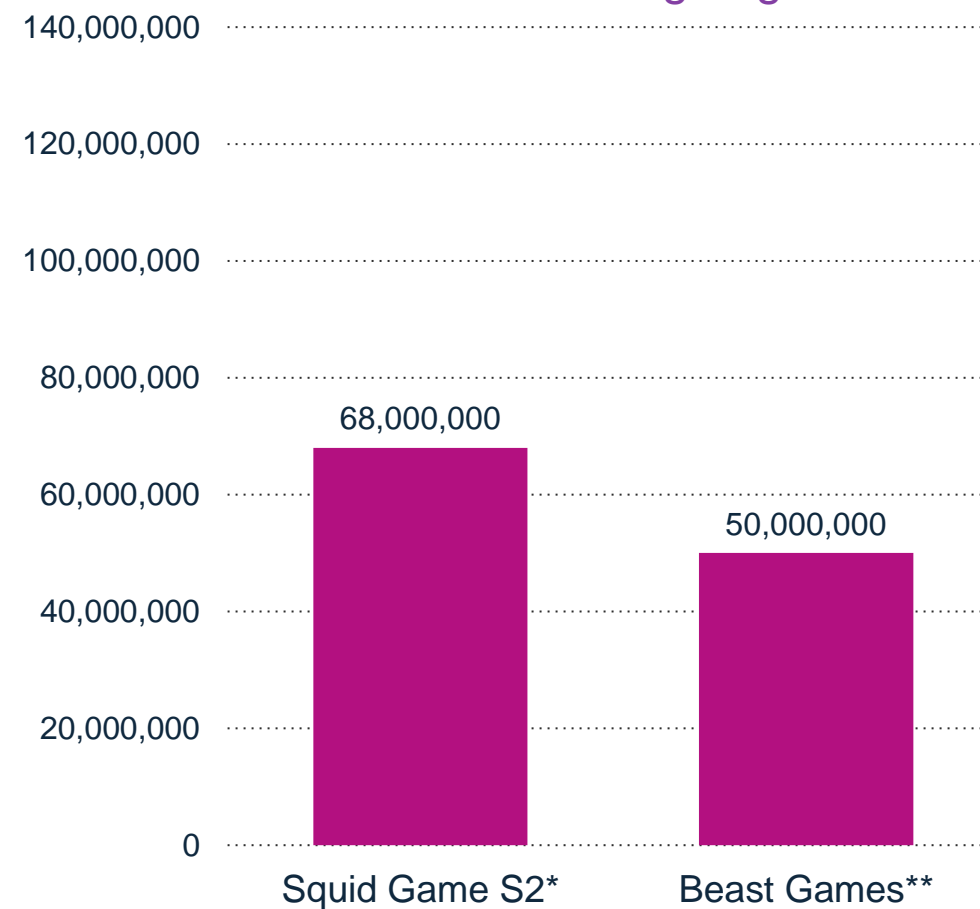
Business Environment

Creator led-content delivers promising results for streamers in 2024

Viewership comparison of selected live sports events



Viewership comparison of selected on demand streaming originals



*Netflix reported 1 premiere week total

**Amazon reported 25 day total

Business Environment

Held over impact of strikes limits 2024 box office total, yet Q4 achieves record best

Box office revenue in North America



Battling the Content Gap

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

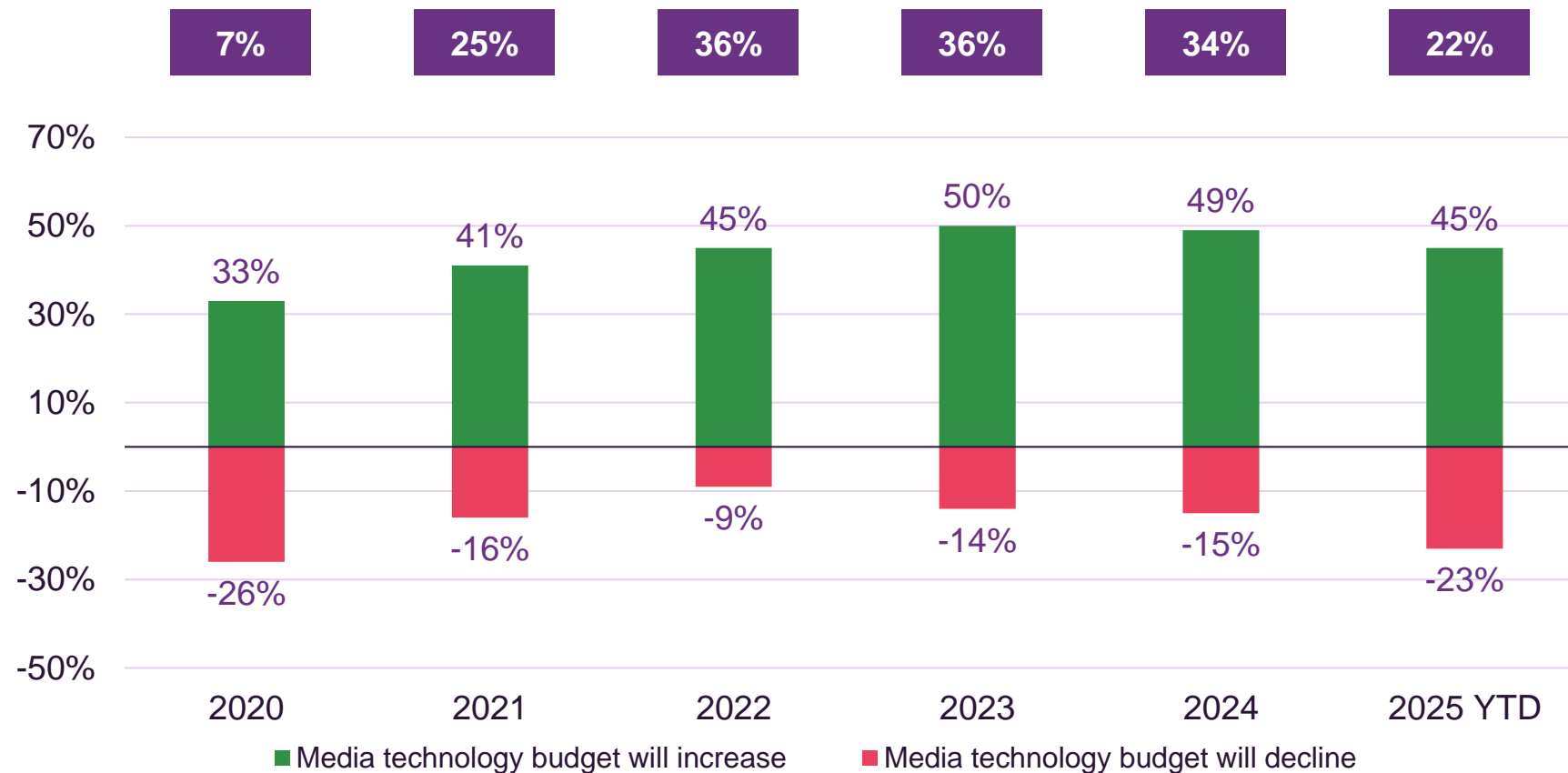
Q1 2025 box office performance falls YoY with studios slates still suffering from shortage of product in the wake of supply chain delays resulting from the 2023 WGA and SAG-AFTRA strikes.

MediaTech Investment

Investment is expected to be more conservative in the year ahead

 Worldwide

MediaTech NET investment outlook at media and production companies



MediaTech Budgets

Fewer MediaTech organizations expect to see an increase in their spending in the year ahead compared to respondents last year.

Although NET investment has fallen by 14% points, a positive NET result still indicates that a greater number of respondents expect to see an increase in investment in the coming year than the number that anticipate a decrease.

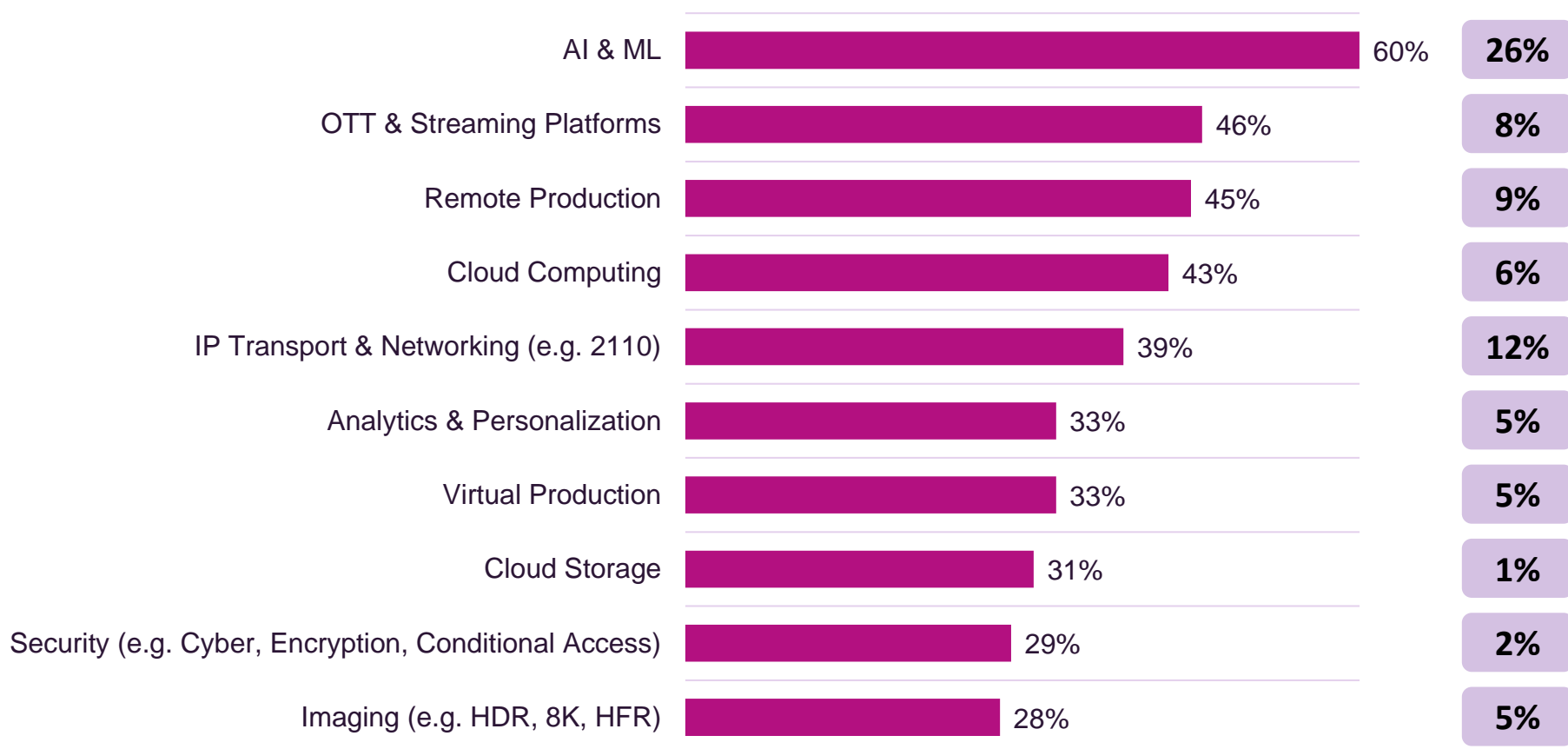
Q. What is your organization's outlook for the overall business environment over the next year? (Media/production companies)

MediaTech Investment

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



Technology Roadmap Priorities (Top10) Main Priority



Artificial Intelligence

AI & ML dominates as the top priority in technology roadmaps, followed by OTT & streaming platforms, remote production and cloud computing.

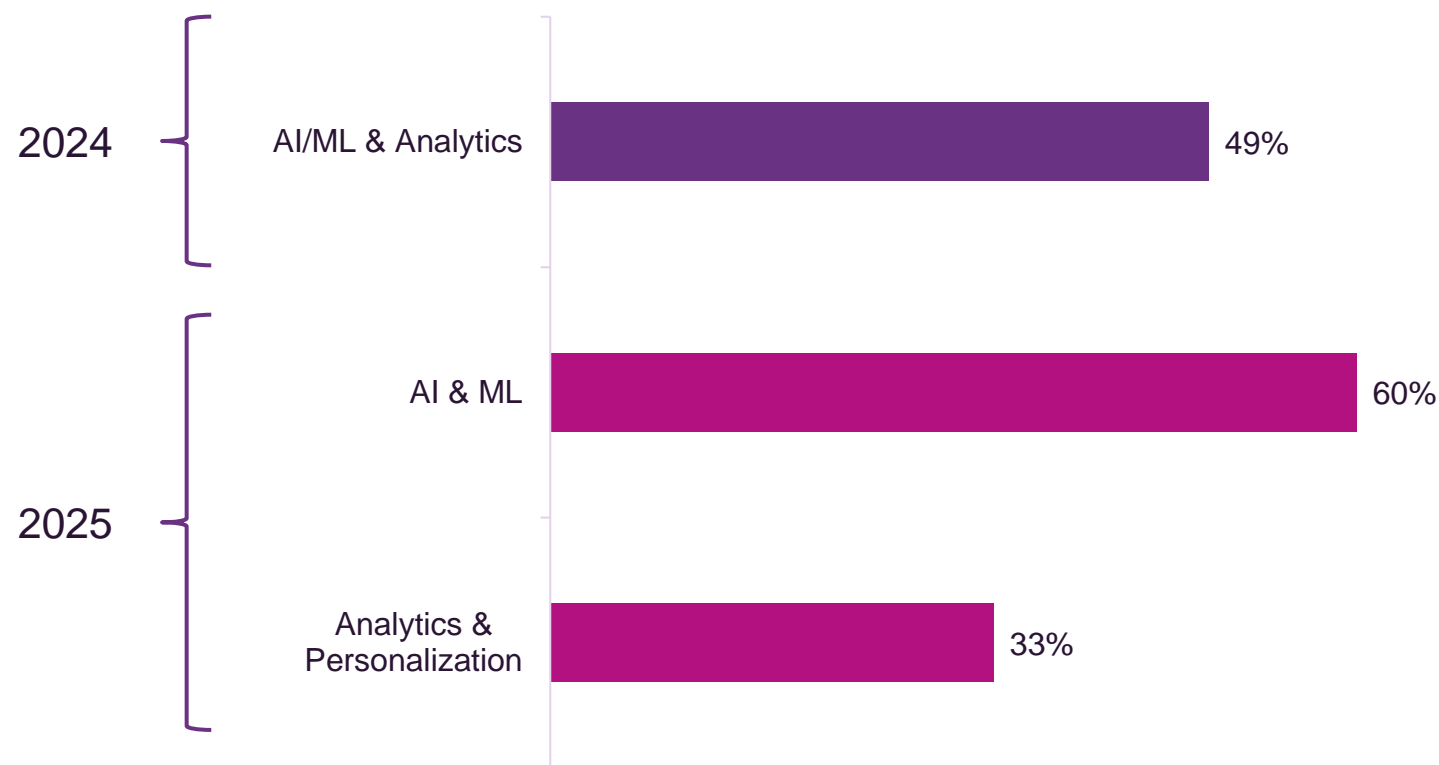
IP transport & networking ranks among the five most important trends in technology roadmaps. IP transport & networking ranks second when respondents were asked to pick only their main priority — this represented a third of all respondents that cited it as one of the most important technology trends.

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

MediaTech Investment

Areas of technology investment updated to reflect an evolving market

Importance of AI/ML and Analytics & Personalization in Technology Roadmaps



Survey Update

In previous iterations of IABM’s MediaTech Industry Tracker Survey, respondents were asked how “AI/ML & Analytics” ranked in their technology roadmaps. As the capabilities of AI/ML expand, it is necessary to separate these technology roadmap answers to allow more granular tracking.

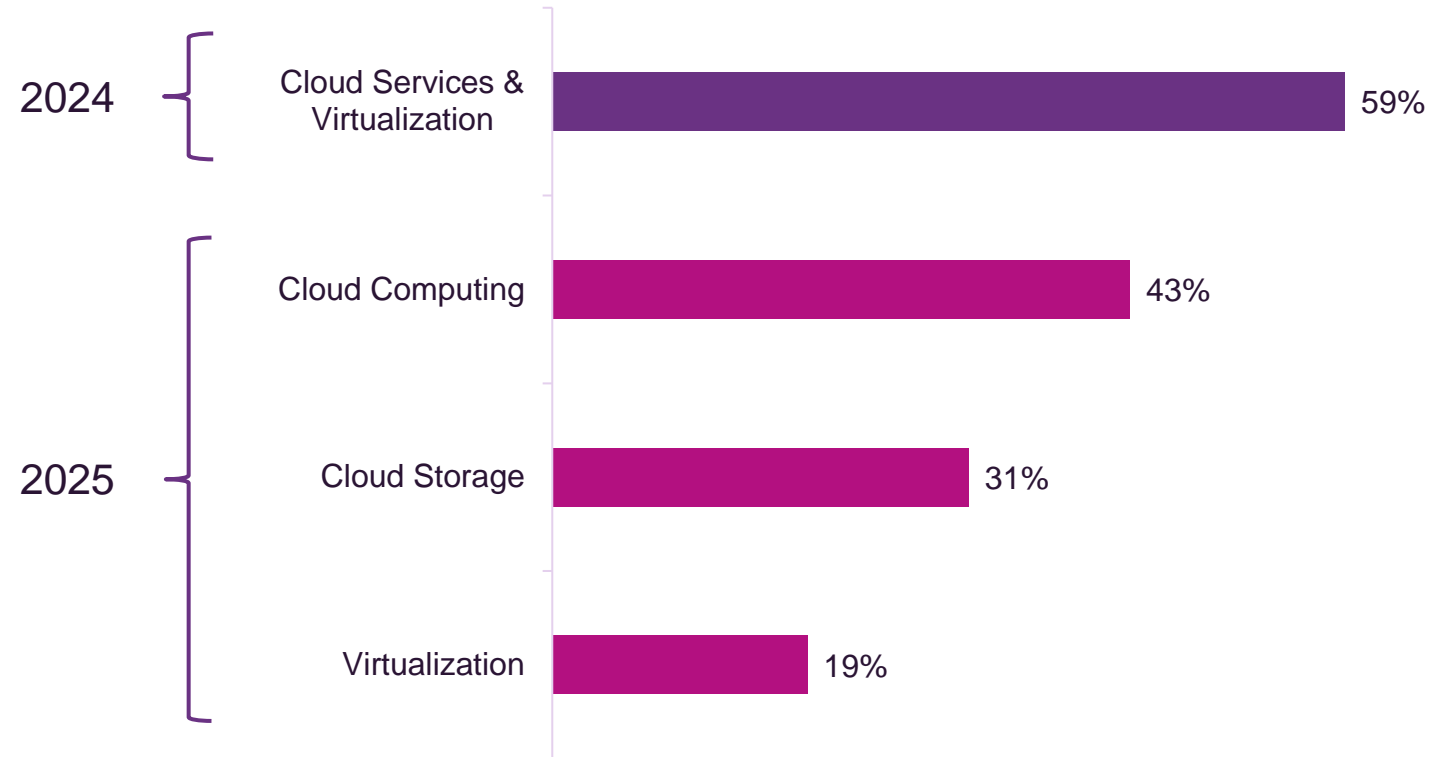
Analytics together with personalization present a developing area of interest that will be tracked independently moving forward to provide additional data insights. This decision has been validated by the new “Analytics & Personalization” option being cited by 33% of respondents.

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

MediaTech Investment

Areas of technology investment updated to reflect an evolving market

Importance of Cloud Services & Virtualization in Technology Roadmaps



Survey Update

In response to IABM Member feedback updates have been introduced throughout the MediaTech Industry Tracker Survey to questions relating to cloud technologies to provide a higher level of accuracy and granularity in the dataset.

The previous technology roadmap option “cloud services & virtualization” has been separated into three distinct options in the 2025 edition of the survey: “cloud computing”, “cloud storage”, and “virtualization” presented as a separate discrete option that does not have to be linked to cloud operations.

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

MediaTech Investment

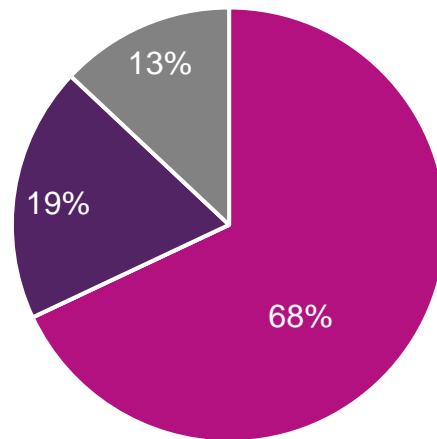
Software and cloud services investment outlook and payment models



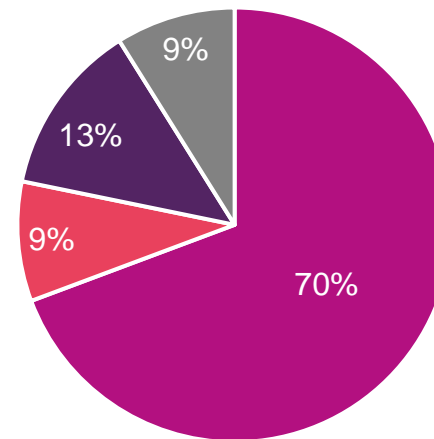
Preferred payment method:

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

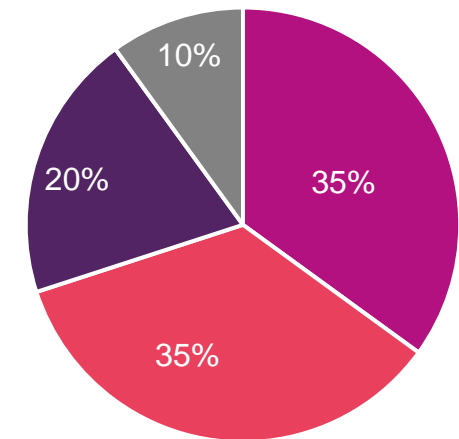
Cloud Computing



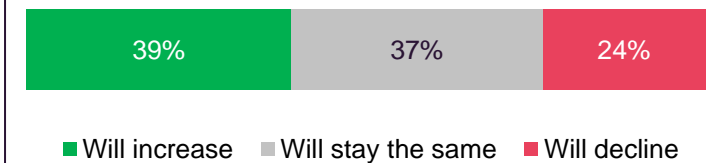
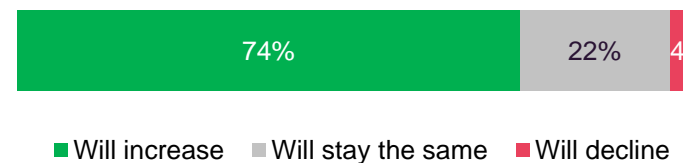
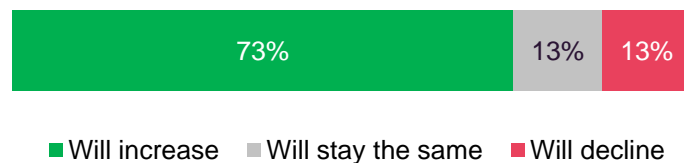
Cloud Storage



Software



Investment outlook:

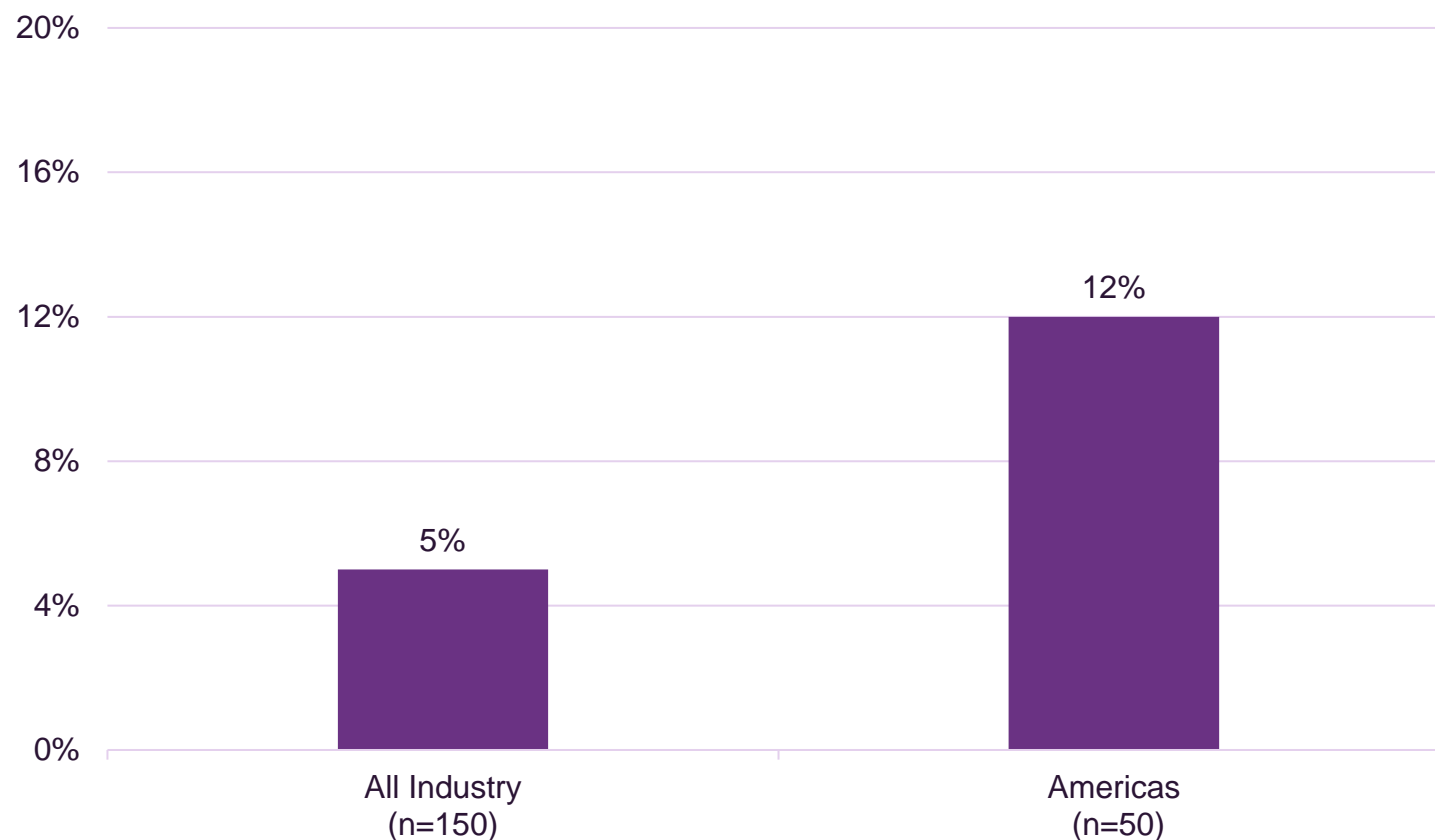


Q. How does your organization prefer to pay for the following products/services? Q. How does your organization prefer to deploy cloud computing/cloud storage? (Media/production companies)

MediaTech Investment

Content authenticity gaining traction in Americas despite low global priority

Provenance & Authenticity in organizations' technology roadmaps (2025 YTD)



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

Sources: IABM

Survey Update

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

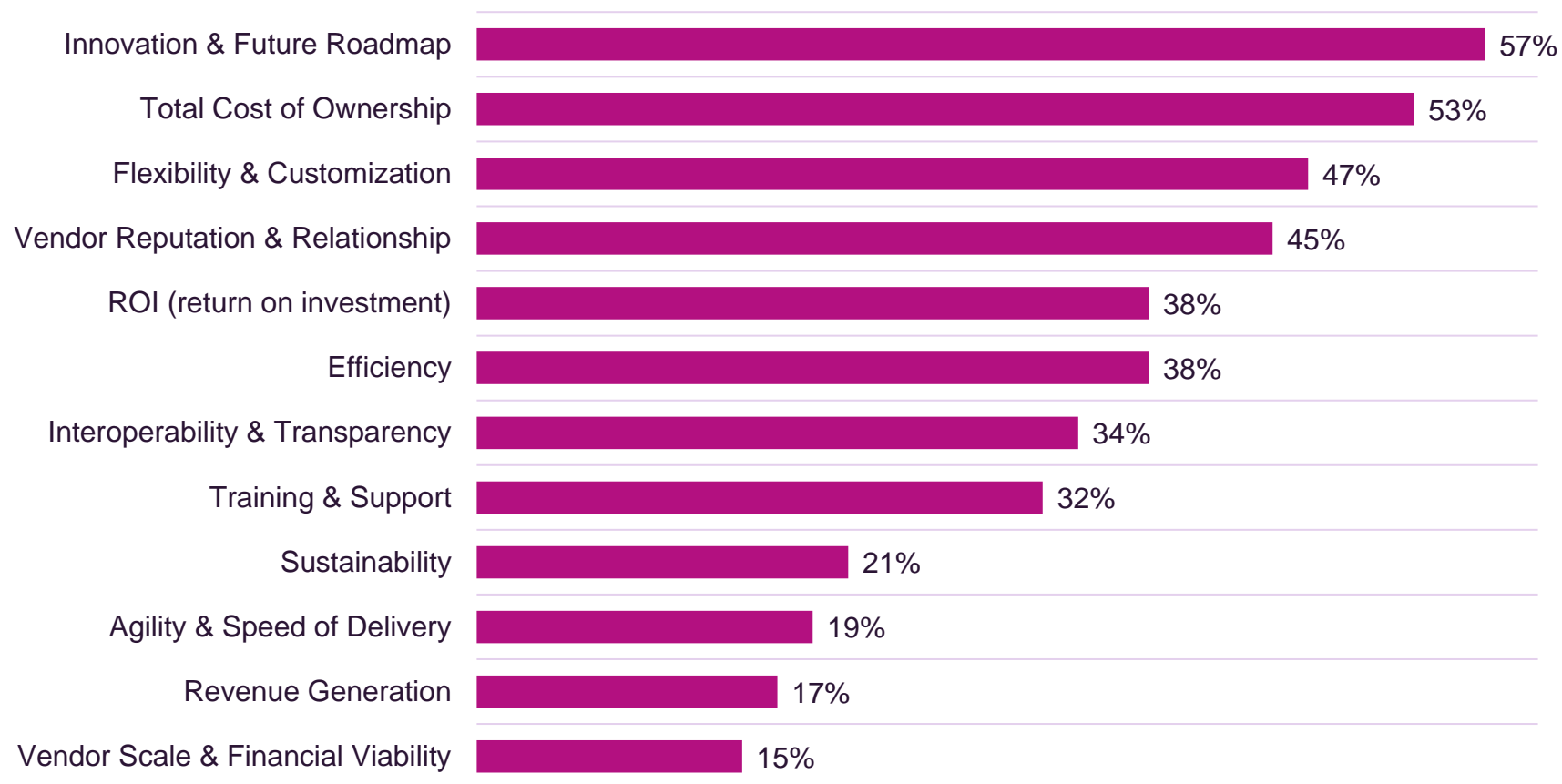
Combating Misinformation

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

MediaTech Investment

Innovation and future roadmap remains the most important investment driver

Technology Purchasing Factors



Media/Production Companies

Innovation & Future Roadmap
 Future technology roadmap, total cost of ownership, customization, and vendor reputation continue to be the primary investment drivers for MediaTech End-Users.
 In contrast to 2024, when efficiency ranked among the top three factors, media technology buyers now place somewhat less emphasis on this aspect.

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

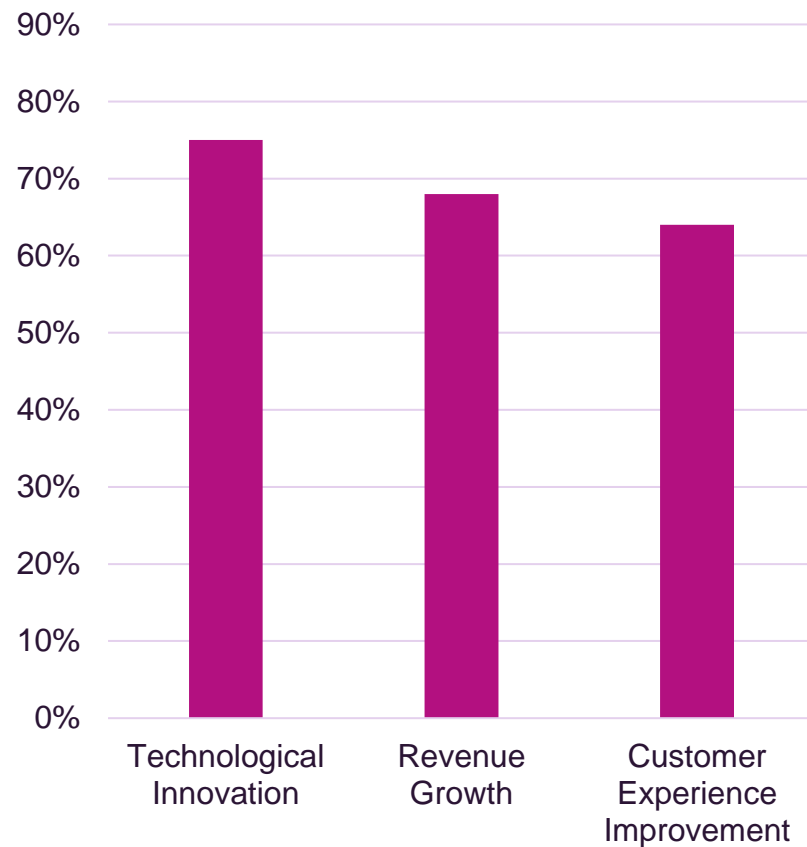
MediaTech Business Models

Technology innovation is driving business transformation



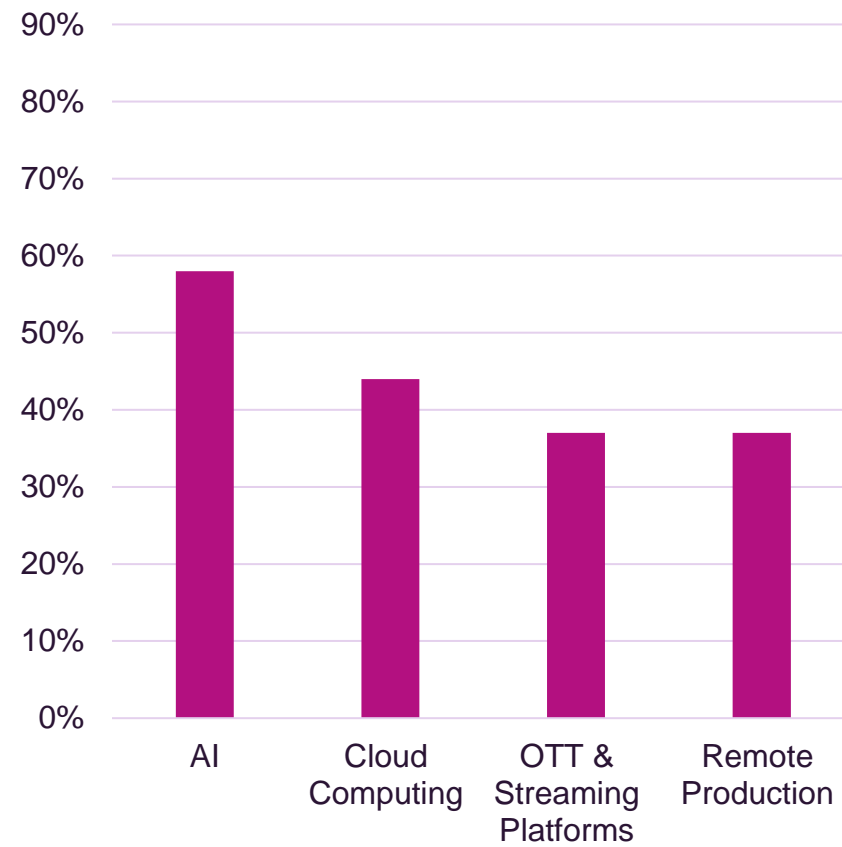
New IABM report on this topic published on MediaTech Vantage™ in Q1 2025!

Key Drivers of Business Transformation (Top 3)



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

Critical Transformation Technologies (Top 3)



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

Business Transformation

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

Survey Methodology

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

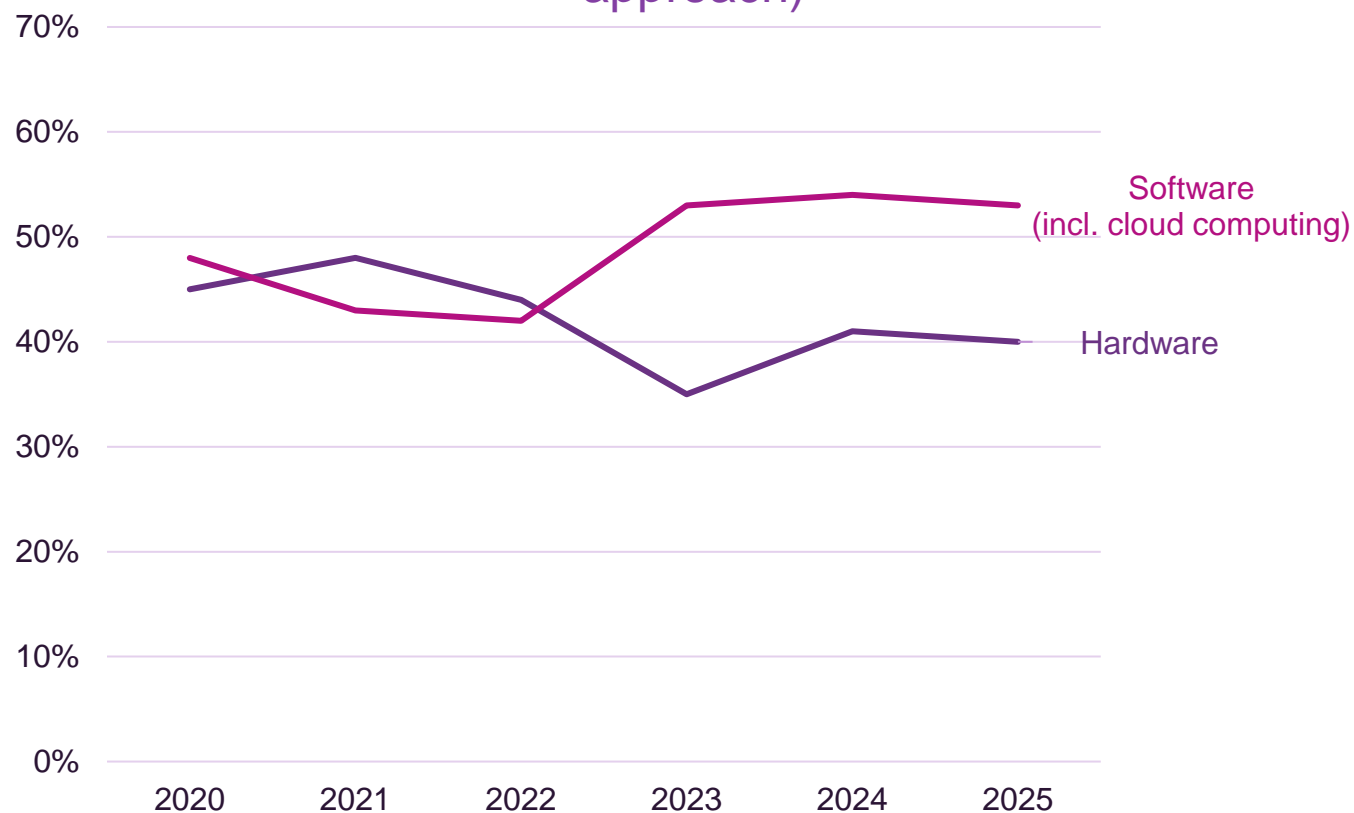
MediaTech Business Models

Suppliers continue to rely primarily on software revenue

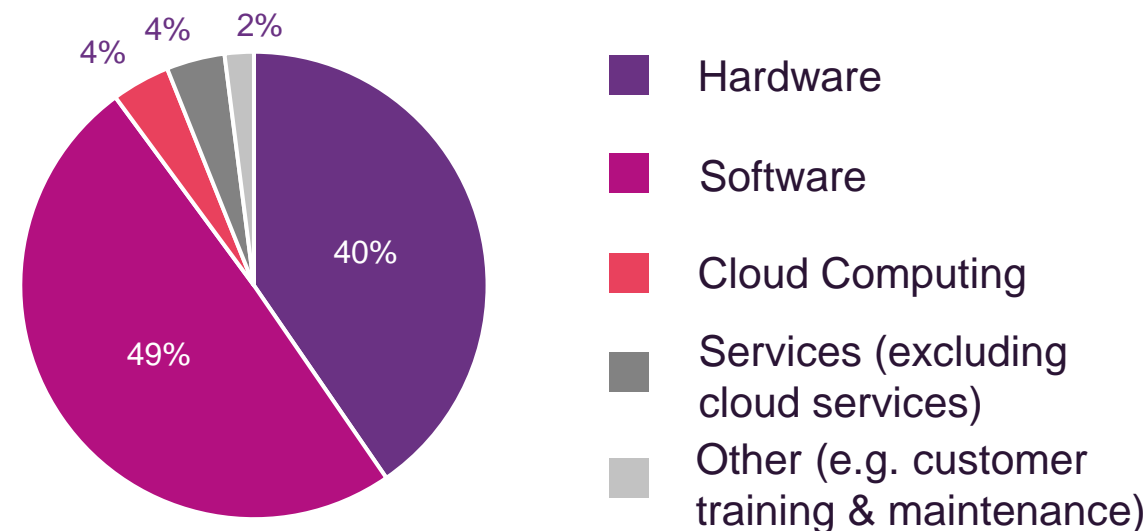


Media Technology Vendors

Supply-side primary revenue sources (2020-2024 approach)



Supply-side primary revenue sources 2025 YTD



Survey Update

In previous iterations of IABM's MediaTech Industry Tracker survey participants were asked about their primary revenue source by technology type and the leading method of payment for software within a single question. As of 2025, these two areas of focus have been separated into individual questions.

Q. What is your organization's primary source of revenue? (media technology vendors, n=91)
 From 2020 to 2024, "Cloud Computing" was included as part of the software category. In 2025, it became a separate response option but has been combined with software in this chart to enable comparison of 2025 YTD and historical data.

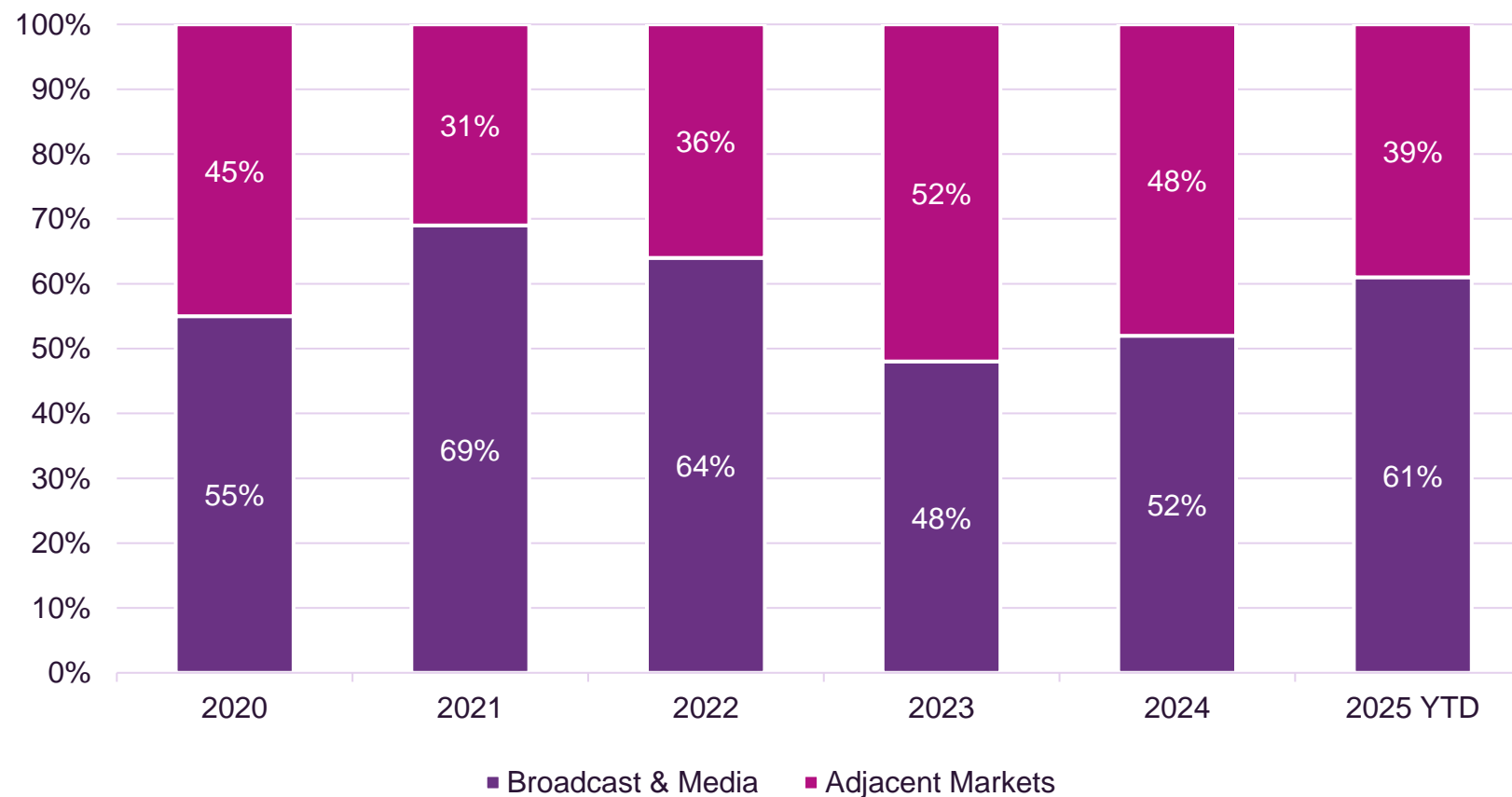
MediaTech Business Models

Broadcast & media business improves while parallel markets remain important



Media Technology Vendors

Average % share of MediaTech supplier revenues by source



Broadcast

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

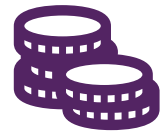
Parallel Markets

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

Q. What percentage of your company's revenues are derived from sales to broadcast and media customer types (broadcasters, streaming platforms etc.)? (media technology vendors, n=62)

State of MediaTech

Common threads in this research



Profitability

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



Transformation

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



Agility

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

Online Resources



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