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IABM Industry Impact Briefing

Leading Successful Transformations in Media Business

IABM Business Intelligence Unit

Chris Evans

Head of Knowledge & Insight - IABM

Common threads in this briefing

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

IABM State of MediaTech

IABM Business Intelligence Unit

State of MediaTech Report Methodology

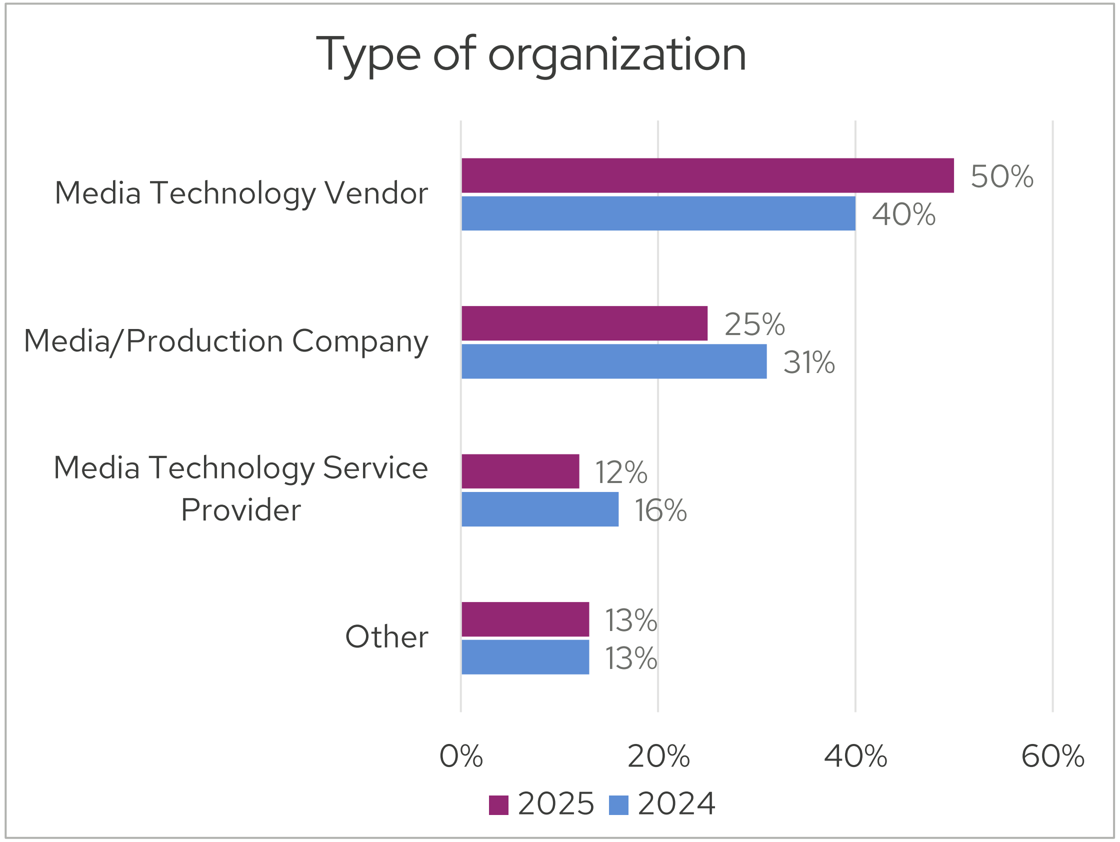
This report was prepared using a hybrid research approach

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

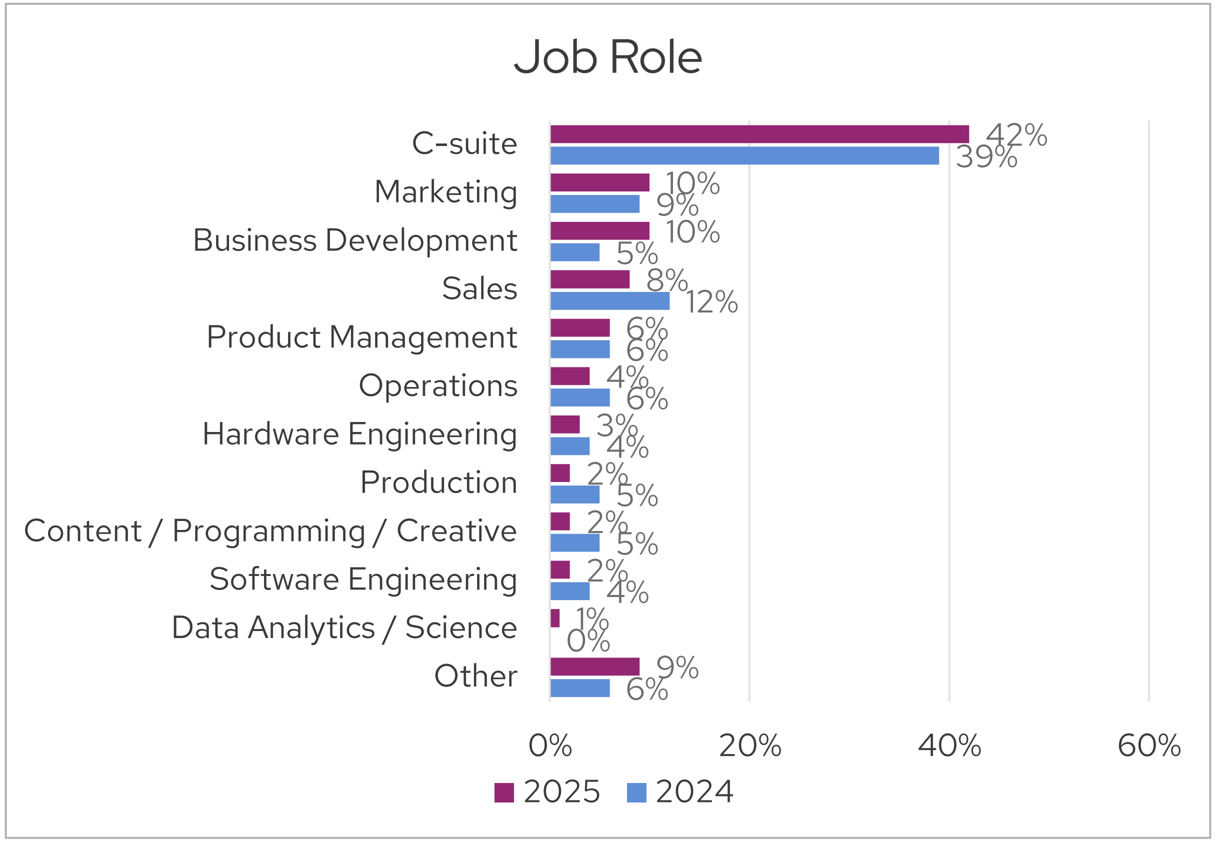
Primary Research	Quantitative: Survey data is at the core of our analysis, providing quantitative insights into the industry's prevailing trends and sentiments.
	Qualitative: To complement our quantitative data, we conducted in-depth interviews with a select group of industry experts. These discussions have provided rich qualitative insights, adding depth and context to our findings.
Secondary Research	Desk-based: Our research is further enhanced by an extensive review of both structured and unstructured public data. This includes an analysis of industry executive quotes, reports, and publications, which offer valuable perspectives on industry trends. We have also incorporated quantitative data from reputable external sources. This data has been carefully selected to enrich our understanding of the industry dynamics and to provide a benchmark against our primary research findings.

MediaTech Industry Tracker

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



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



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

Source: IABM MediaTech Industry Tracker

State of MediaTech Report

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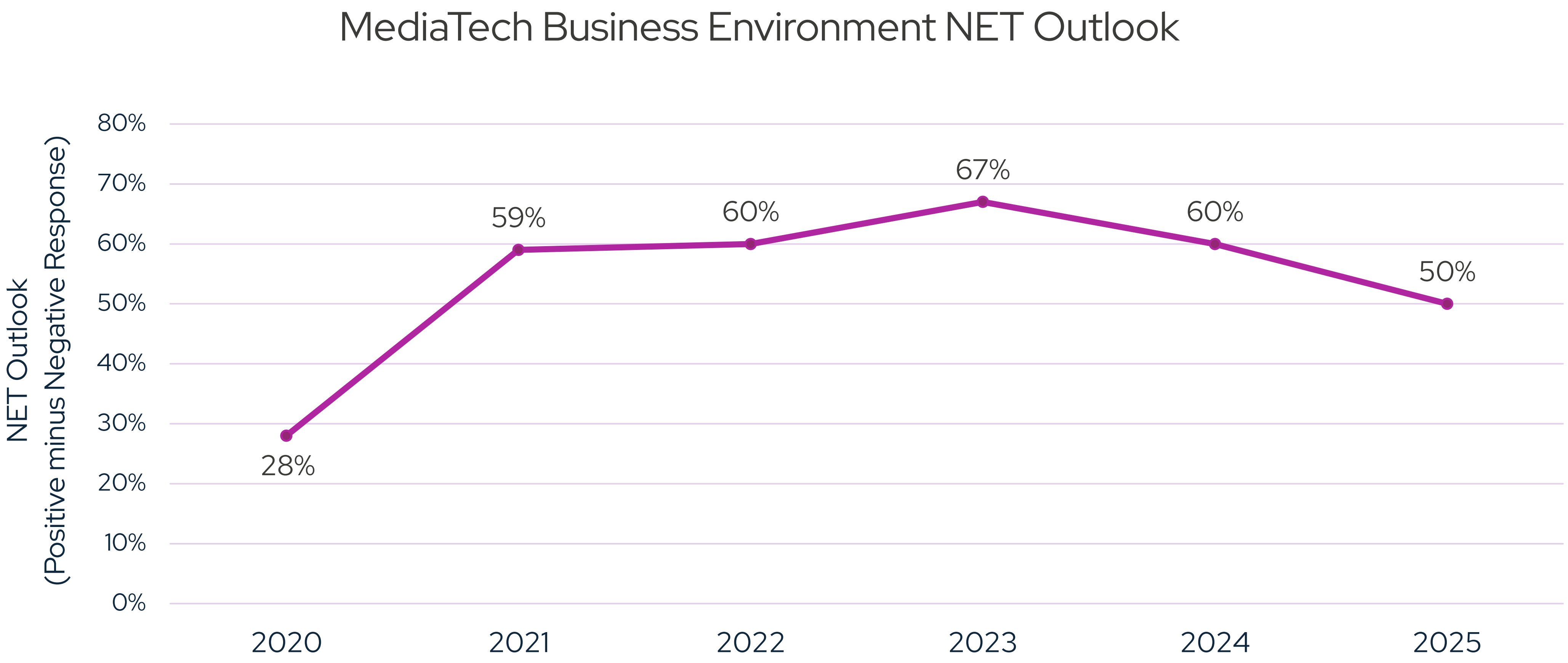
Business Environment

The business environment outlook has worsened compared to last year



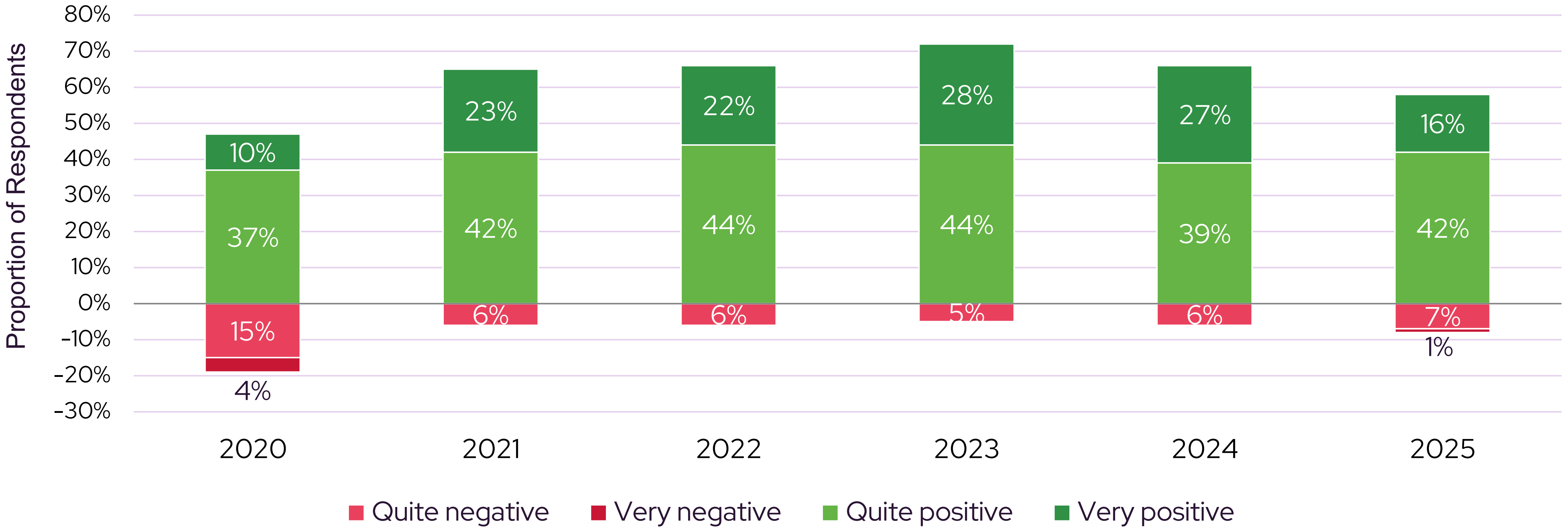
Q. What is your organization's outlook for the overall business environment over the next year? (All Industry)

Source: IABM MediaTech Industry Tracker

Business Environment

Strength of positivity in business environment outlook has lessened

MediaTech Business Environment Outlook

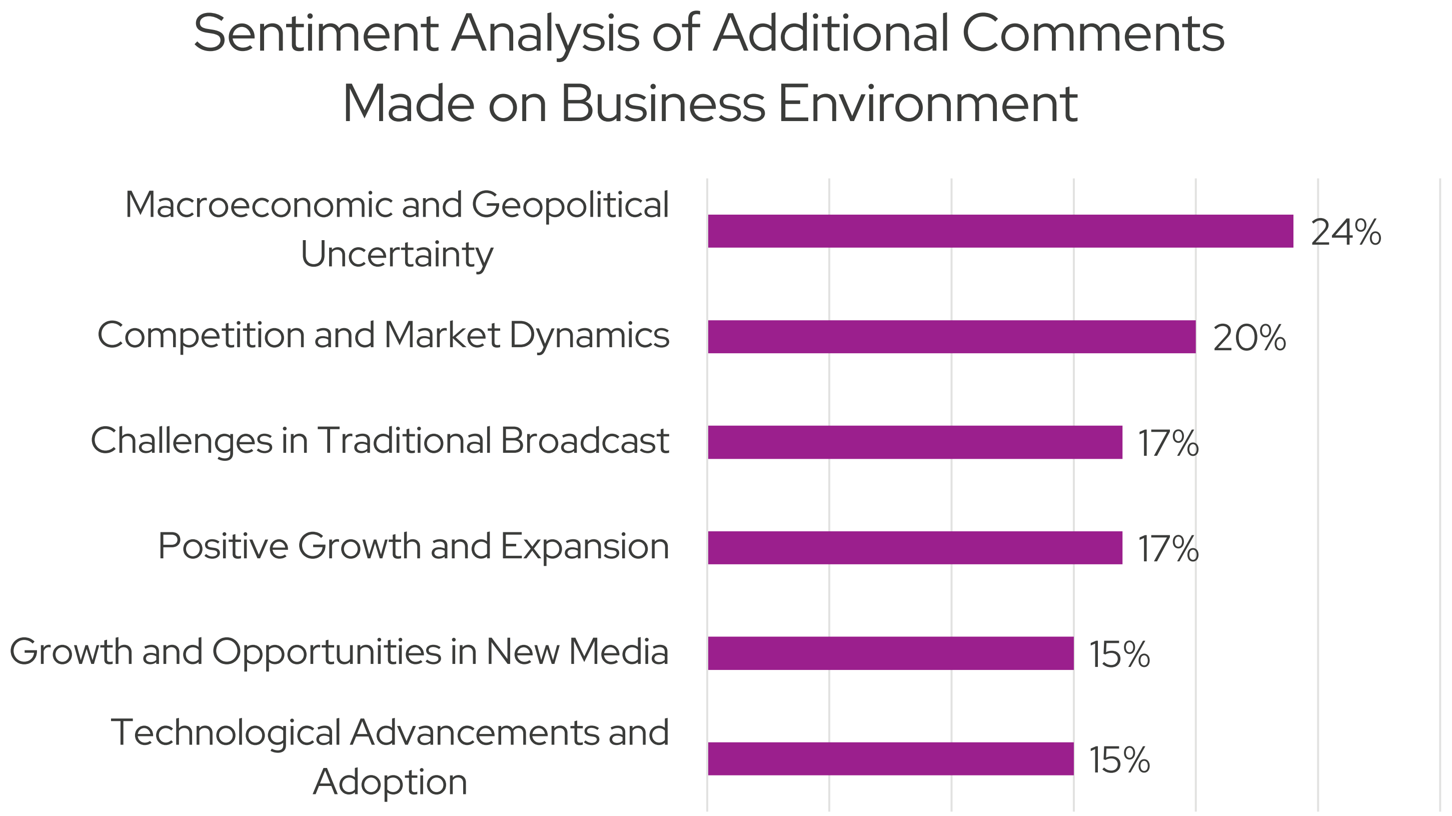


Q. What is your organization's outlook for the overall business environment over the next year? (All Industry)

Source: IABM MediaTech Industry Tracker

Business Environment

Uncertainty continues to inhibit decision making



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

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

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

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

Source: IABM MediaTech Industry Tracker

Business Environment

How will we define the next generation of broadcast media?

Technology & Platform

Audience

Purpose & Mission

Source: IABM

This unprecedented alliance will enable our premium content to reach unparalleled audiences and unlock new reach for advertisers

Rodolphe Belmer, CEO
TF1
(June 2025)

Source: TF1, Netflix

We will provide French consumers with even more reasons to come to Netflix every day and to stay with us for all their entertainment

Greg Peters, Co-CEO
Netflix
(June 2025)

Source: TF1, Netflix

Business Environment

Media leadership on diverging paths to transformation

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Together, we will capitalize upon our iconic media assets, chart a course for growth and continue to attract additional talent as we build momentum toward the completion of the spin-off.

Mark Lazarus, CEO
Versant
(January 2025)

VERSANT

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

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

Paramount
A SKYDANCE CORPORATION

Source: Versant, Paramount, a Skydance Corporation

Business Environment
YouTube Now Consistently Leads US TV Viewing

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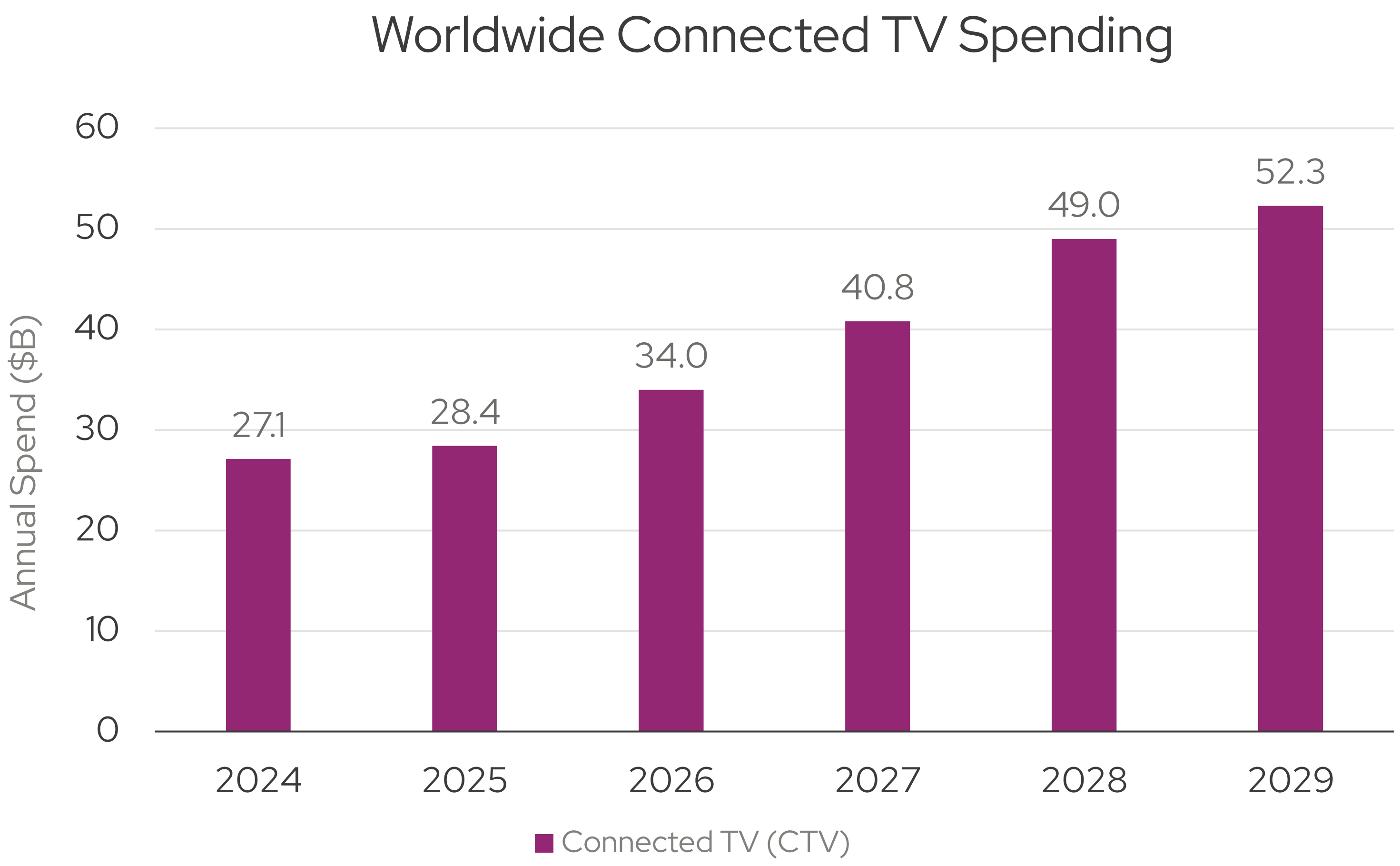
	Monthly TV Viewing by Distributor					
	July	June	May	April	March	February
Rank 1	YouTube	YouTube	YouTube	YouTube	YouTube	YouTube
Rank 2	The Walt Disney Company	The Walt Disney Company	The Walt Disney Company	The Walt Disney Company	The Walt Disney Company	The Walt Disney Company
Rank 3	NETFLIX	NETFLIX	NBCUniversal	Paramount	Paramount	FOX
Rank 4	NBCUniversal	NBCUniversal	Paramount	NBCUniversal	NBCUniversal	NETFLIX
Rank 5	FOX	Paramount	NETFLIX	NETFLIX	NETFLIX	Paramount

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

Source: Nielsen Gauge

Business Environment
CTV a key destination for advertising spend



Streaming Growth Enhances CTV Ad Spend

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

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

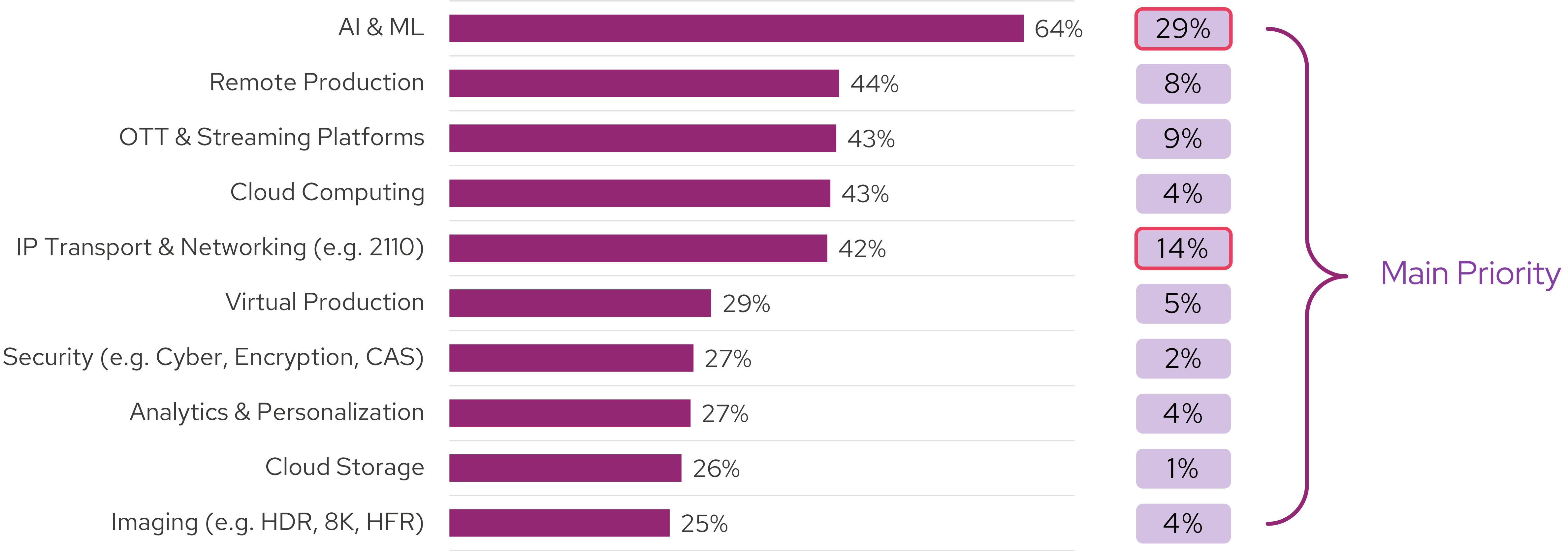
Source: IDC Worldwide Retail Media Network and Connected TV Forecast, 2025-2030

MediaTech Investment

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

All Industry

Technology Roadmap Priorities (Top10)



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

Source: IABM MediaTech Industry Tracker

MediaTech Investment

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

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All Industry

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

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

Source: IABM MediaTech Industry Tracker

MediaTech Investment

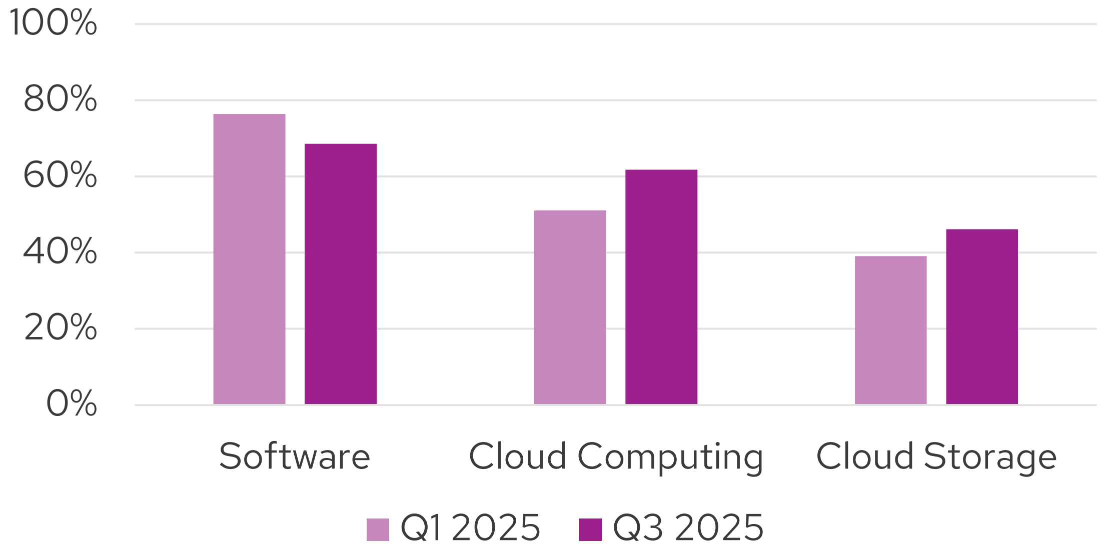
End users' investment outlook in software has accelerated in Q3 2025

Media Technology Vendors

Media/Production Companies

Supplier revenue outlook

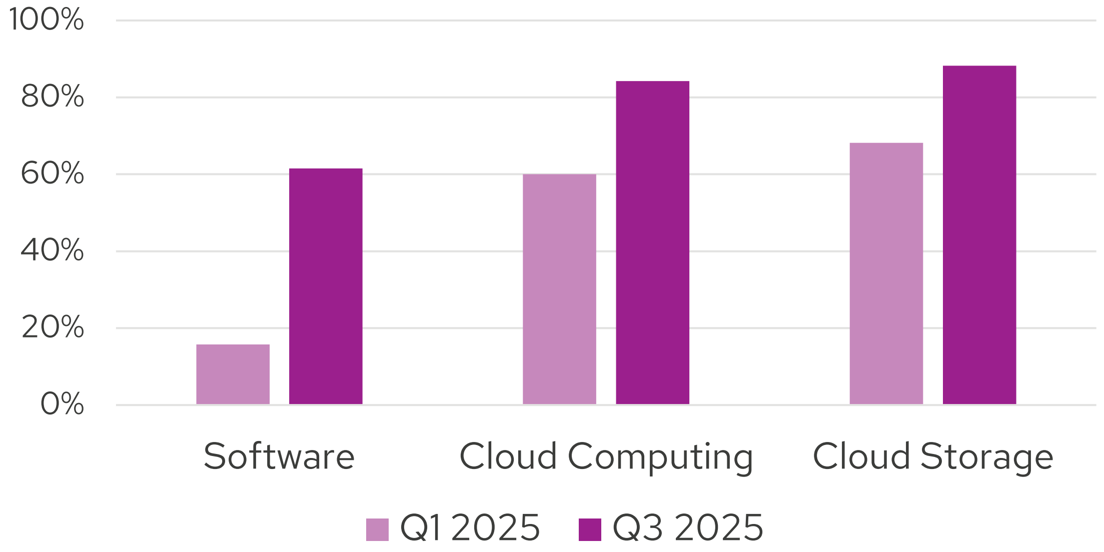
NET outlook (will increase minus will decline)



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

End user investment outlook

NET outlook (will increase minus will decline)



Q. What is your outlook for your organization's investment in the following categories of products/services over the next year? (media/production companies, sample size – from 17 to 38)

Source: IABM MediaTech Industry Tracker

Investment in security is growing

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

Drivers of change

- Transition to OTT and streaming
- Transition to software-based workflows

Strategies to address cyber threats

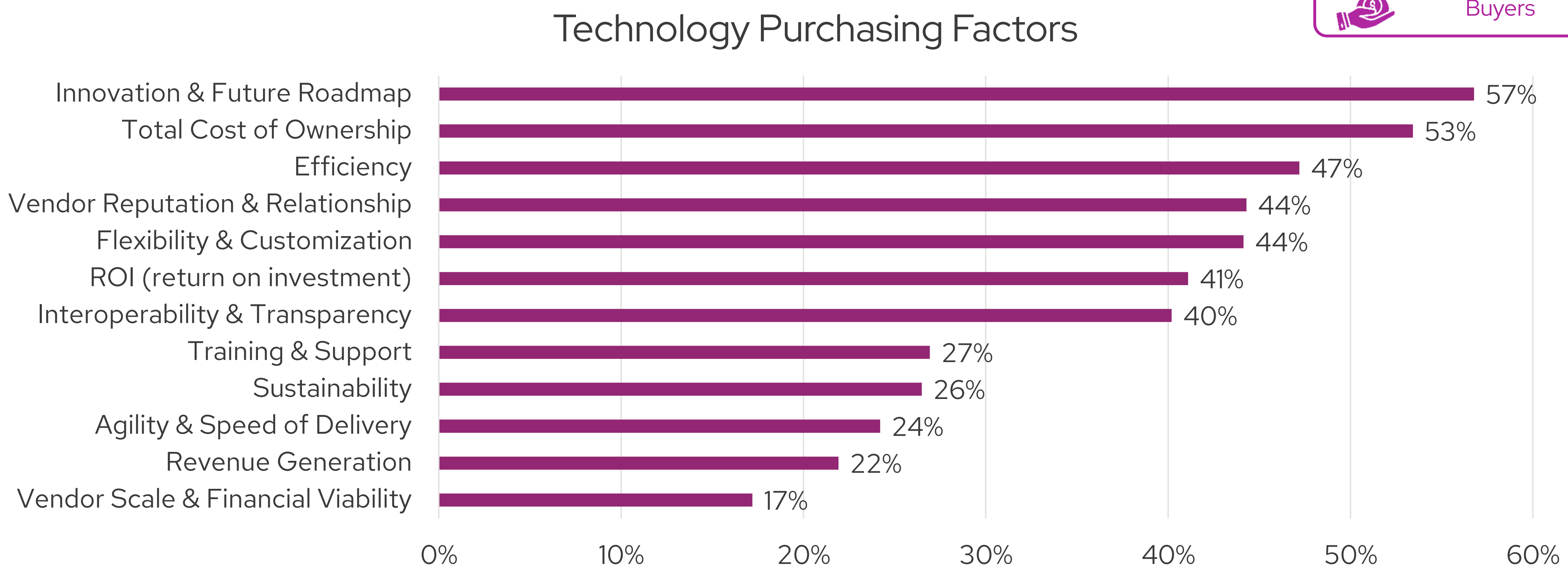
- Strengthening perimeter (Zero Trust architecture)
- Training employees
- Fostering collaboration

Source: IABM Security in MediaTech Ecosystems Megatrend Report

MediaTech Investment

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

Media Technology Buyers



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

Source: IABM MediaTech Industry Tracker

Business Environment

Media organizations set out guidelines on generative AI usage

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

[...]

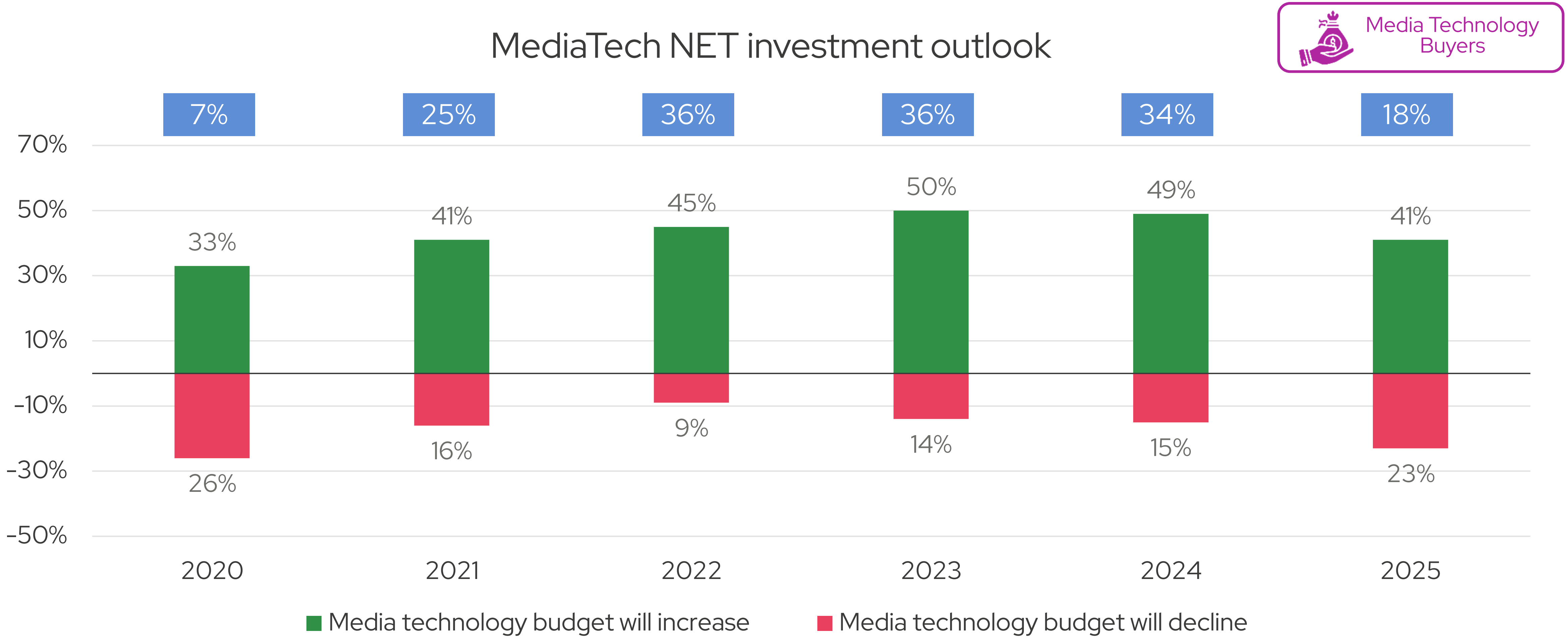
If the output includes final deliverables, talent likeness, personal data, or third-party IP, written approval will be required before you proceed.

Using Generative AI in Content Production Guidelines
Netflix
(August 2025)

Source: Netflix

MediaTech Investment

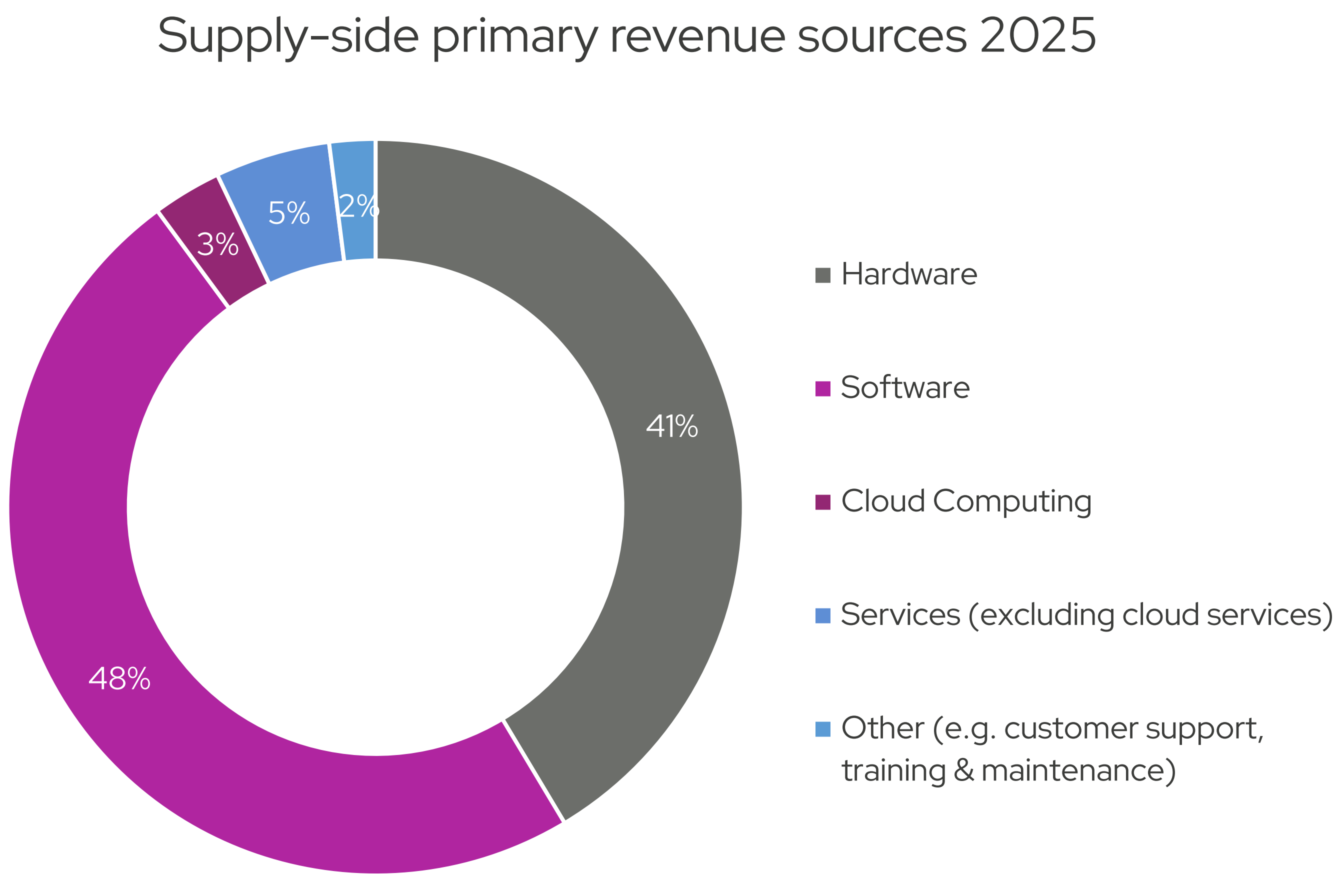
Investment is expected to be more conservative in the year ahead



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

Source: IABM MediaTech Industry Tracker

MediaTech Business Models
Opportunity for software catalysed by Media eXchange Layer initiative



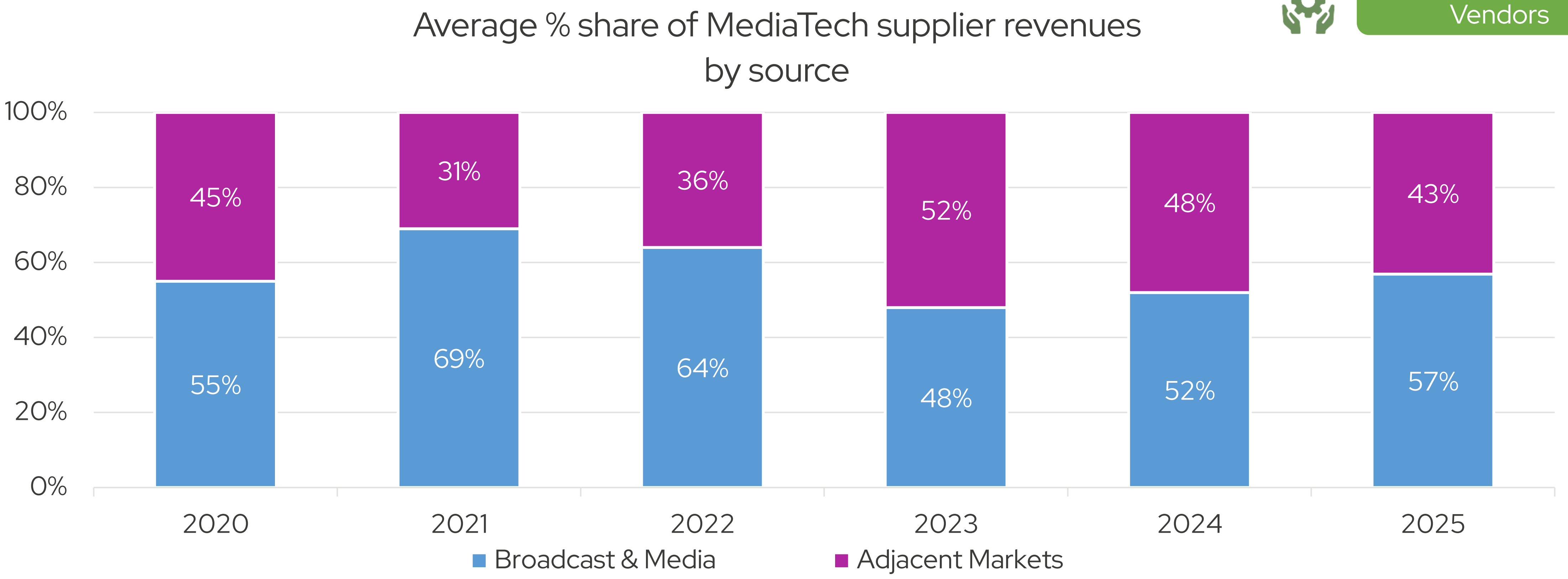
Innovation in Software-Defined Applications for Media Production

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

Source: IABM MediaTech Industry Tracker

MediaTech Business Models
Broadcast & media business improves while parallel markets remain important

Media Technology Vendors



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

Source: IABM MediaTech Industry Tracker

Common threads in this research

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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

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IABM Global Engaged Partner Panel

IABM Business Intelligence Unit

Purminder Gandhu

Technology Evangelist,
IABM

Gareth Gordon

Chief Operating Officer,
QTV

Donna Mulvey Jones

Director of Post Production,
Banijay

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IABM Members' Leadership Panel

IABM Business Intelligence Unit

Chris Evans
Head of Knowledge & Insight, IABM

Nicola Cogotti
CEO and Cloud Architect, Alpha Cogs

Steph Lone
Director, Solutions Architect, AWS

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Upcoming on the IABM Impact Stage

Located in the IABM Hub, The Diamond Lounge (Entrance G)

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Friday

MASTERING MULTIPLATFORM FAN ENGAGEMENT IN LIVE SPORTS
12 – 1PM

BUSINESS TRANSFORMATION – THE MEDIATECH BUYER PERSPECTIVE
1:30- 2:30PM

IABM INNOVATION ARENA - MEMBER TECHNOLOGY SHOWCASE
4:15 - 5:30PM

Saturday

BEYOND THE BUZZ: WHAT CTOS REALLY THINK ABOUT MEDIATECH 2025
8:30 - 9:30AM

THE MOVING TARGET OF TARIFFS: WHERE ARE WE NOW?
12 - 1PM

CHALLENGES IN MONITORING THE EVOLVING COMPLEXITY IN VIDEO NETWORKS
1:30 - 2:30PM

IABM IMPACT AWARDS (SPONSORED BY AVIXA)
6 - 7PM

Upcoming on the IABM Impact Stage

Located in the IABM Hub, The Diamond Lounge (Entrance G)

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Sunday

AV MEDIA CONVERGENCE BRIEFING: UNDERSTANDING PARALLEL MARKET OPPORTUNITIES WITH IABM

8:30 - 9:20AM

RETHINKING SECURITY FOR SOFTWARE-DEFINED MEDIA WORKFLOWS

12 - 1PM

SOLVING THE ENERGY EQUATION – TRANSLATING SUSTAINABILITY INTO COST SAVINGS AND EFFICIENCIES

1:30- 2:30PM

Monday

THE FUTURE IS HERE: MEET THE IABM BURSARY WINNERS

10 - 11AM

EXPECTATIONS VS EXPERIENCE – THE SECRETS TO KEEPING EARLY CAREER TALENT

11:15 - 12:15PM

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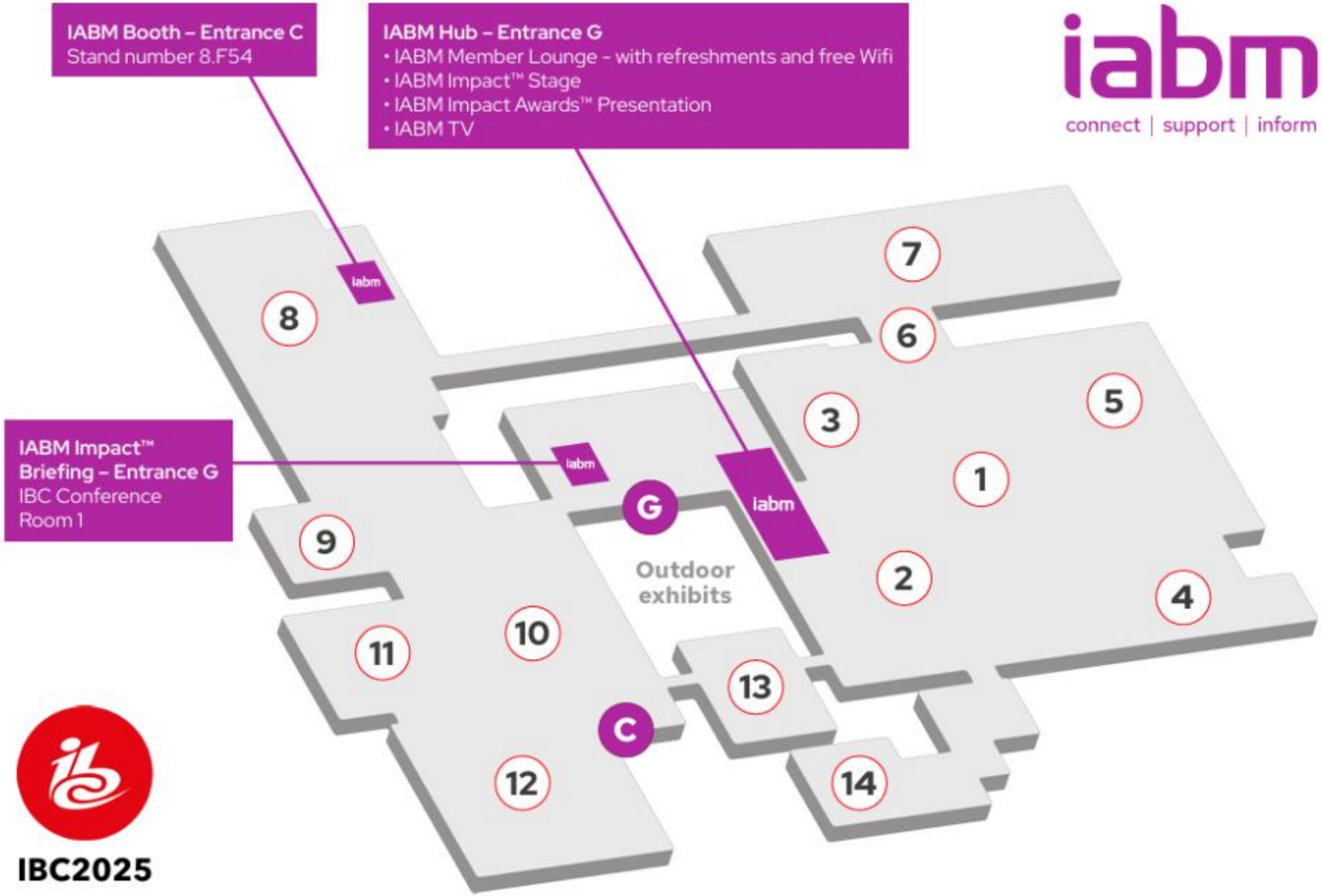

IBC2025

SCAN TO VIEW THE FULL SCHEDULE