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# IABM Industry Impact Briefing InterBEE 2025

IABM Business Intelligence Unit



**Chris Evans**

Head of Knowledge &  
Insight - IABM

# Shaping the Global MediaTech Landscape

Common threads in this keynote



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

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# IABM State of MediaTech

IABM Business Intelligence Unit

# State of MediaTech Report Methodology



This report was prepared using a hybrid research approach

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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:

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## 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.

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## Secondary Research

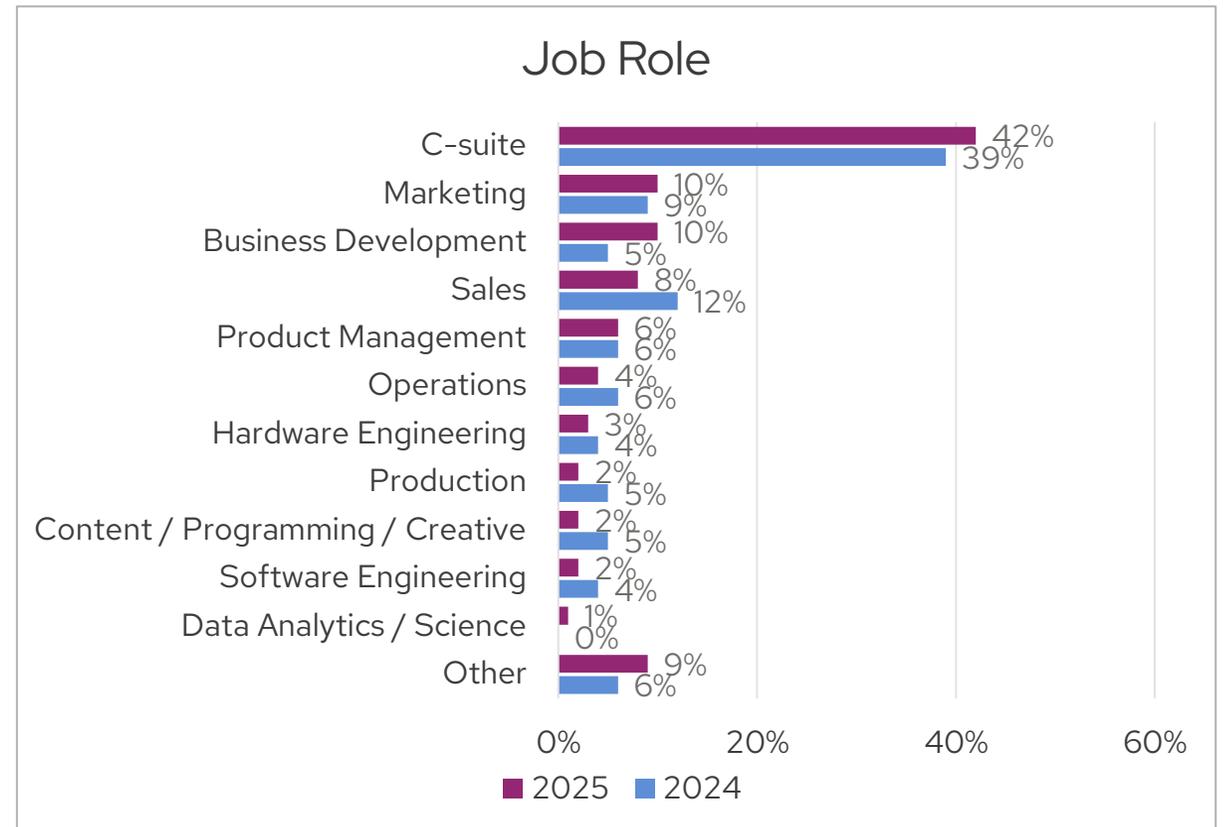
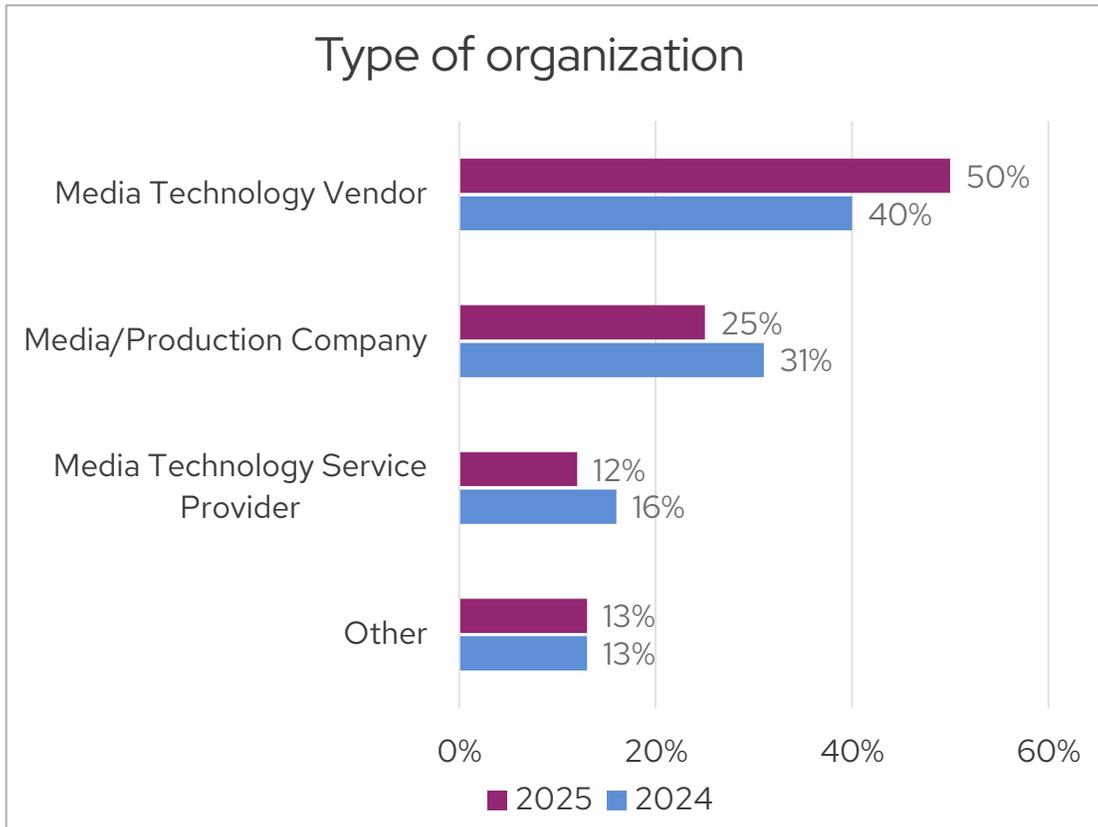
**Desk-based:** Our research is further enhanced by an extensive review of both structured and unstructured public data. This includes an analysis of industry executive quotes, reports, and publications, which offer valuable perspectives on industry trends.

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.

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# 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.

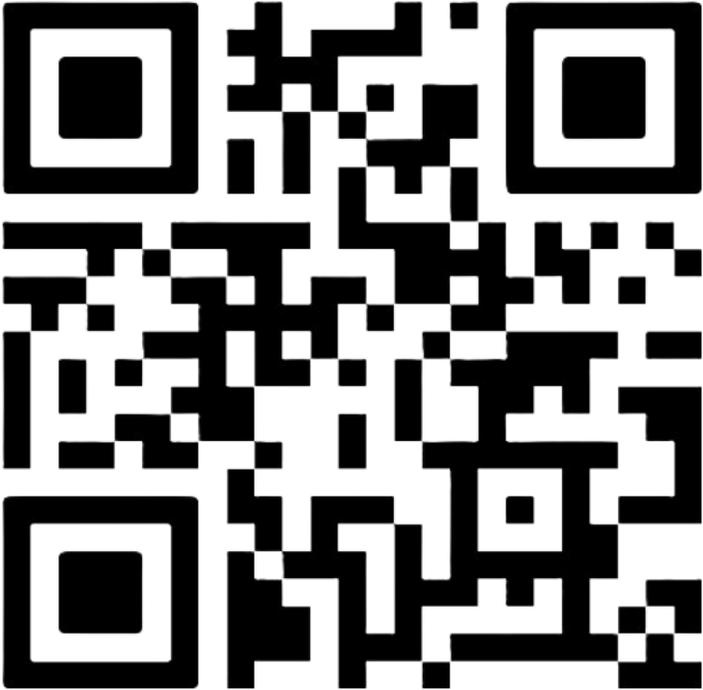
Source: IABM MediaTech Industry Tracker

# State of MediaTech Report

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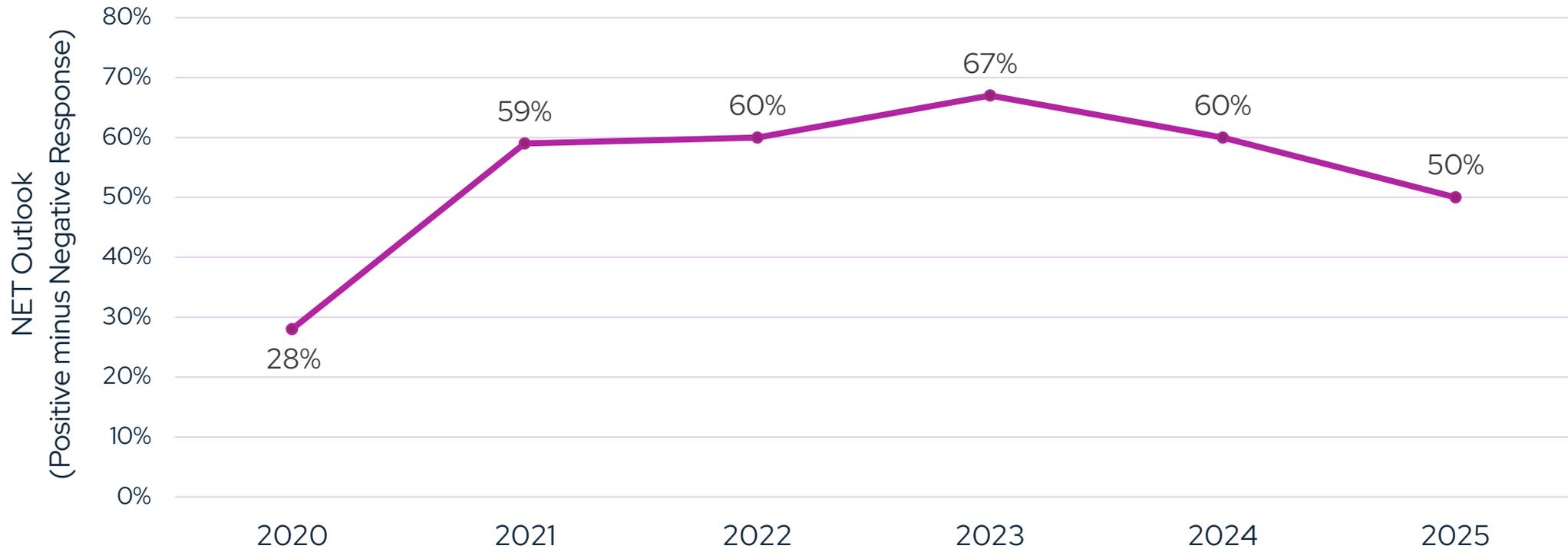
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# Business Environment

The business environment outlook has worsened compared to last year



## MediaTech Business Environment NET Outlook



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

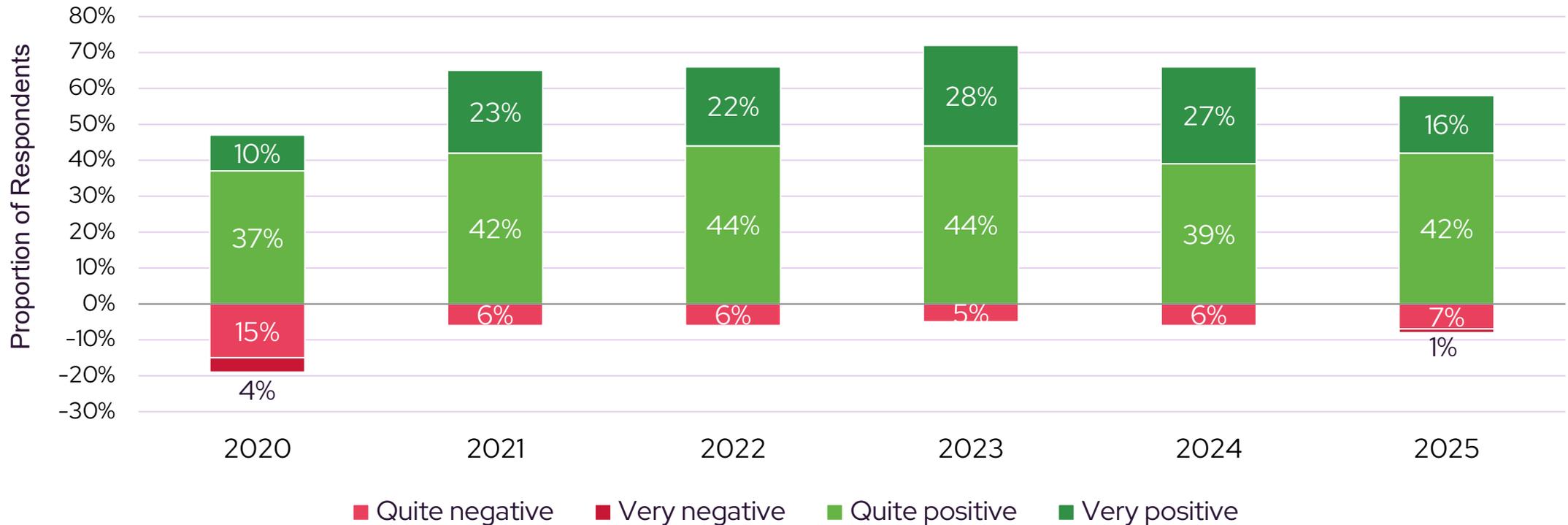
Source: IABM MediaTech Industry Tracker

# Business Environment

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)

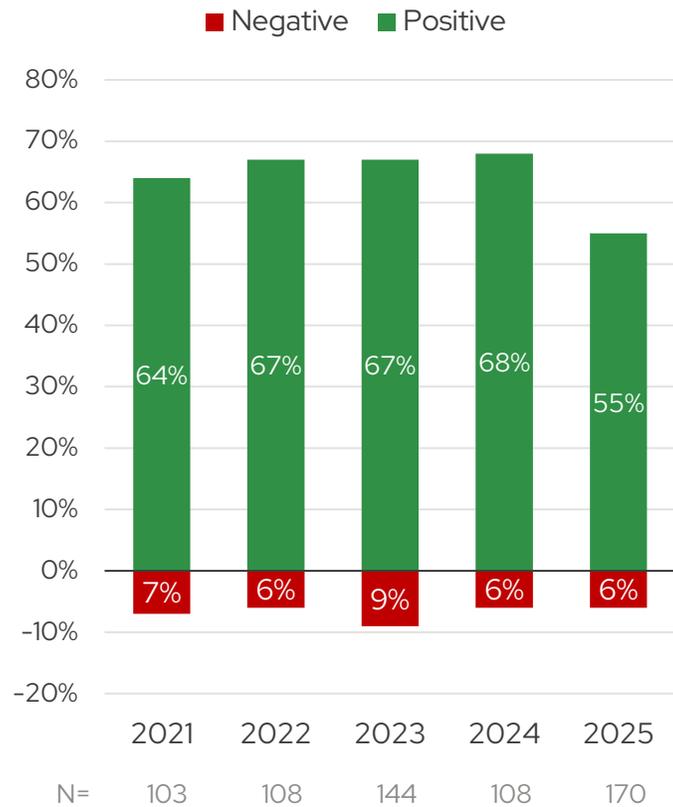
Source: IABM MediaTech Industry Tracker

# Business Environment

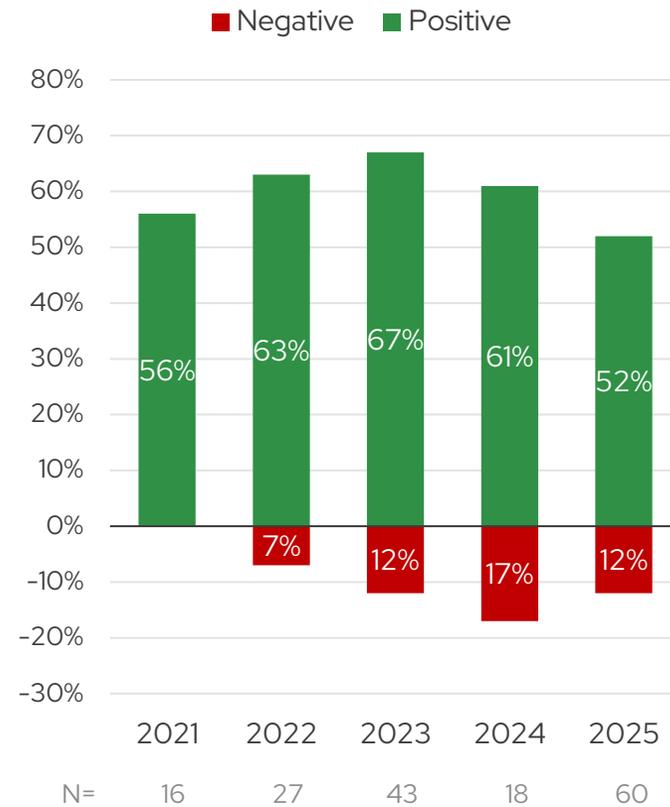
The decline in business confidence is mainly attributed to EMEA & APAC



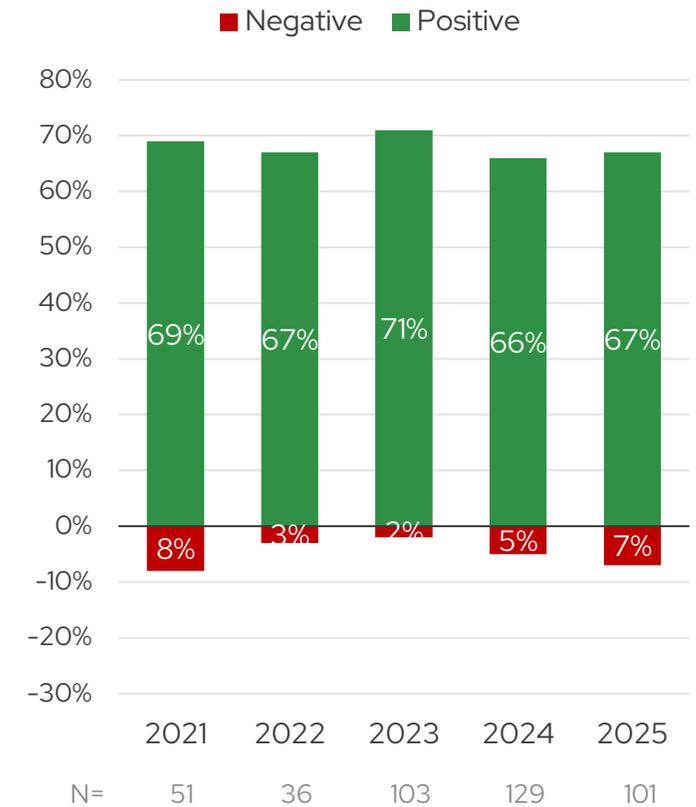
## EMEA



## APAC



## Americas



Source: IABM MediaTech Industry Tracker

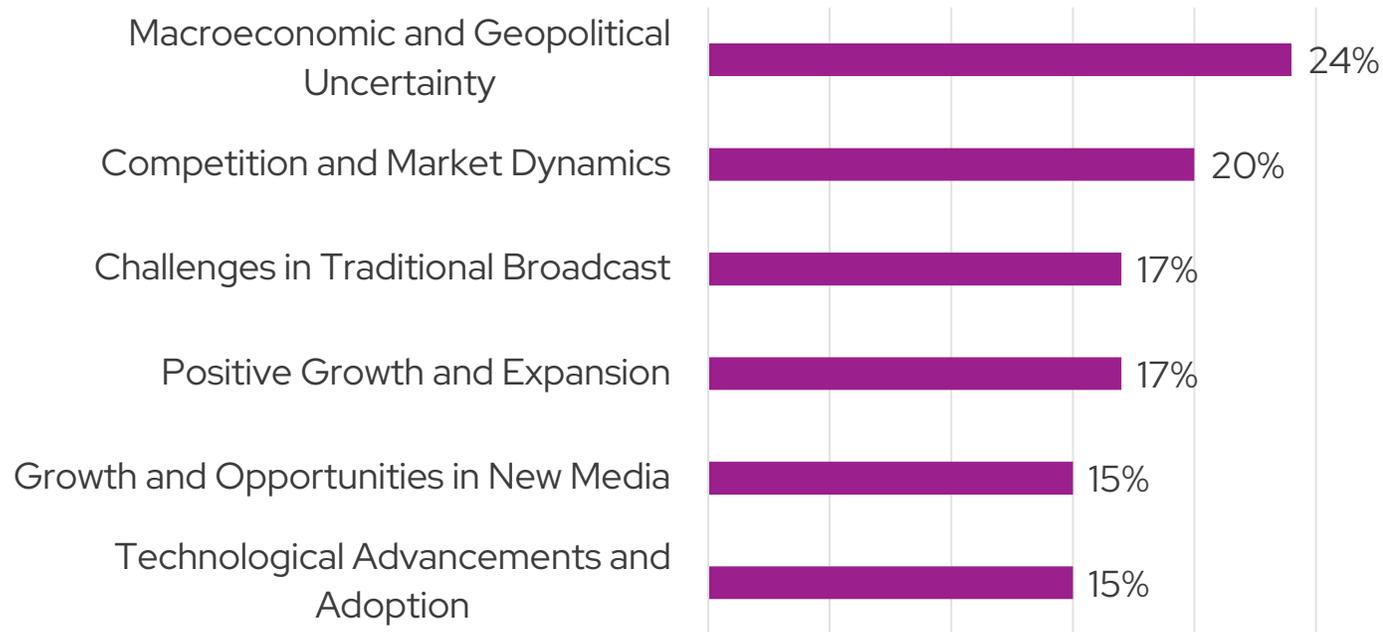
Q. What is your organization's outlook for the overall business environment over the next year?

# Business Environment

## Uncertainty continues to inhibit decision making



### Sentiment Analysis of Additional Comments Made on Business Environment



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."*

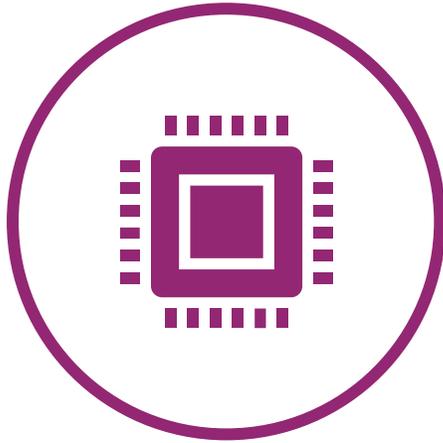
Source: IABM MediaTech Industry Tracker

# Business Environment

How will we define the next generation of broadcast media?

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Technology &  
Platform



Audience



Purpose & Mission

Source: IABM

# Business Environment

Transformation is already redefining broadcast media

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*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

# Business Environment

Transformation is already redefining broadcast media

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*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)

**NETFLIX**

Source: TF1, Netflix

# Business Environment

International appeal on streaming boost Anime market



### Annual Revenue of Japanese Animation



Streaming Growth Drives A Higher Rate of Growth for Overseas Revenues

XXX

Source: Association of Japanese Animation

# 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.*

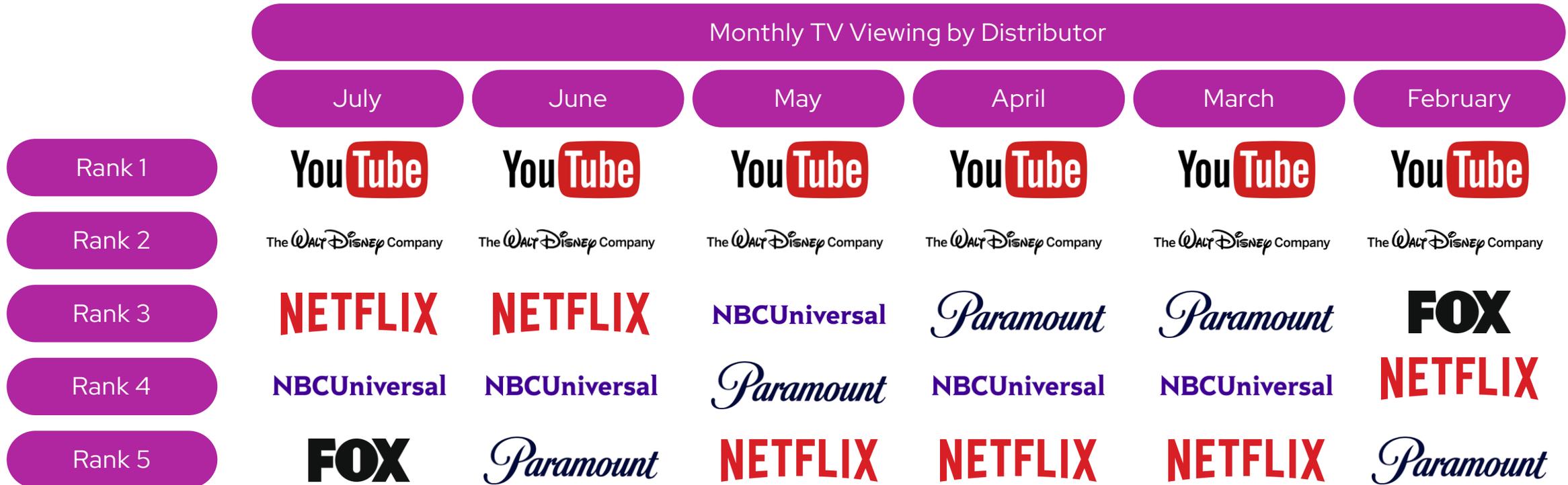
David Ellison, Chairman and CEO  
Paramount, a Skydance Corporation  
(August 2025)



Source: Versant, Paramount, a Skydance Corporation

# Business Environment

## YouTube Now Consistently Leads US TV Viewing



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.

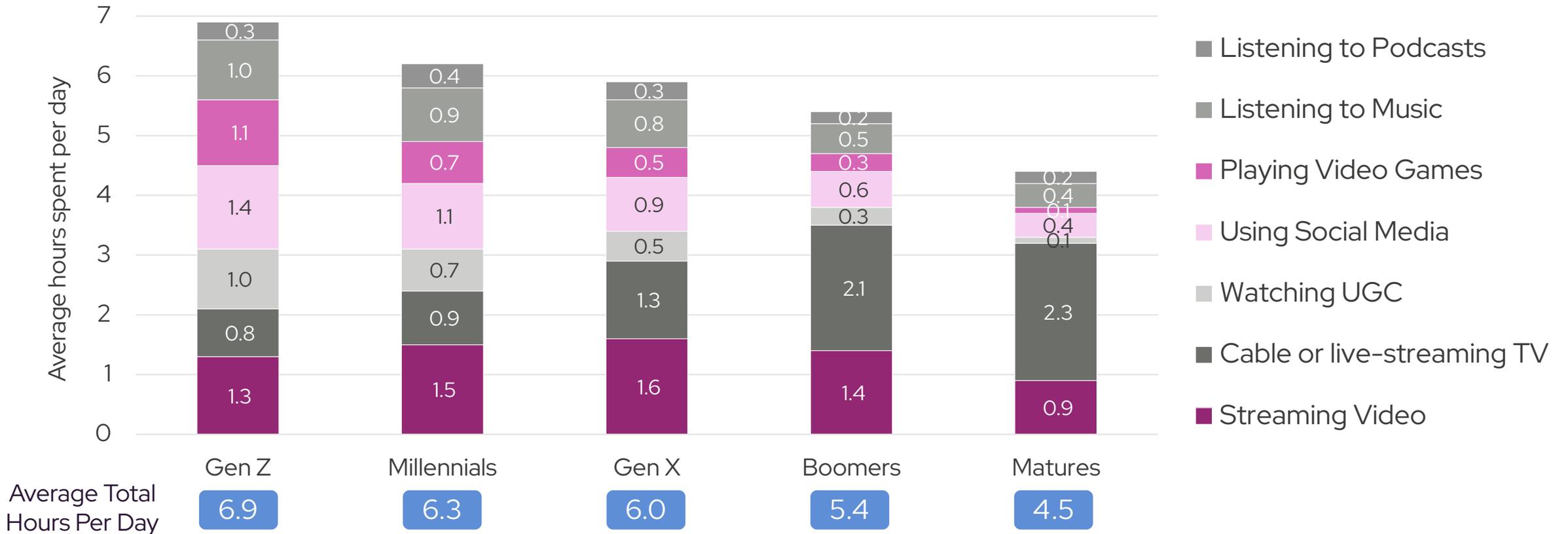
Source: Nielsen Gauge

# Business Environment

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



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



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

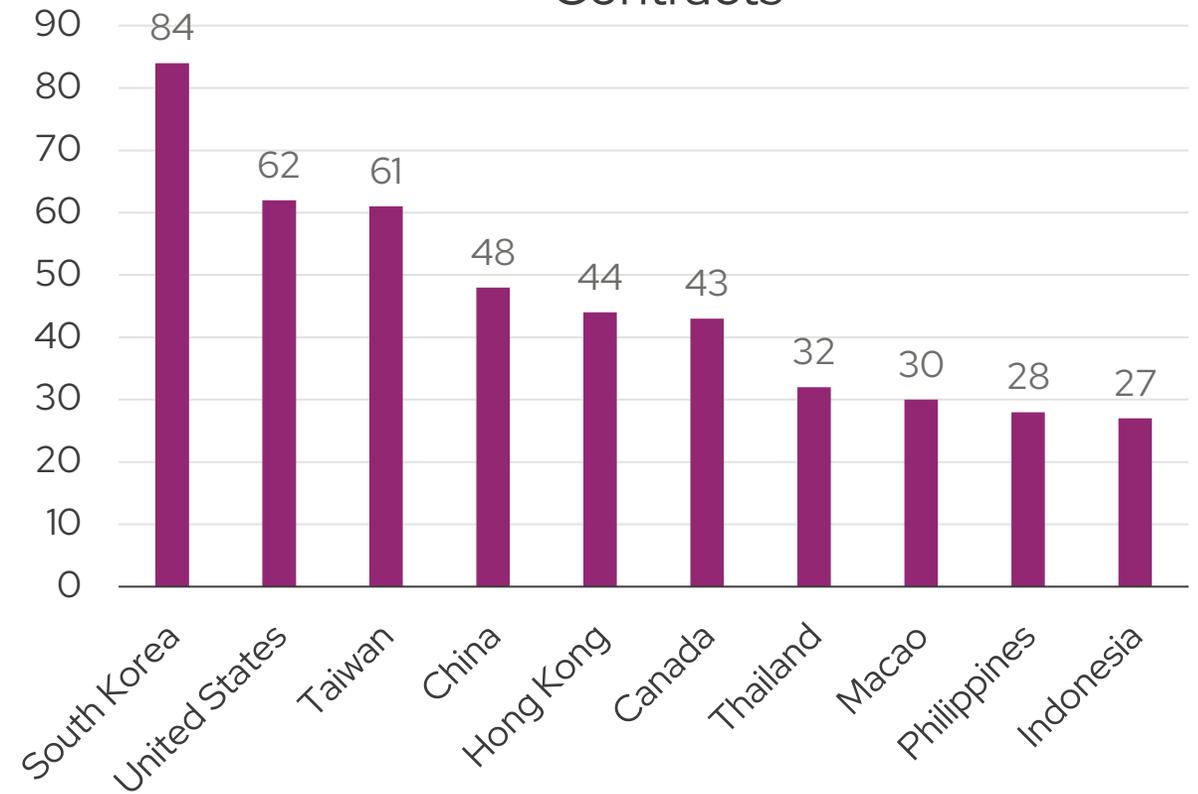
Sources: IABM, Deloitte Digital Media Trends, 19th Edition (March 2025)

# Business Environment

Monetizing global audience appeal



Top 10 Overseas Markets by Number of Contracts

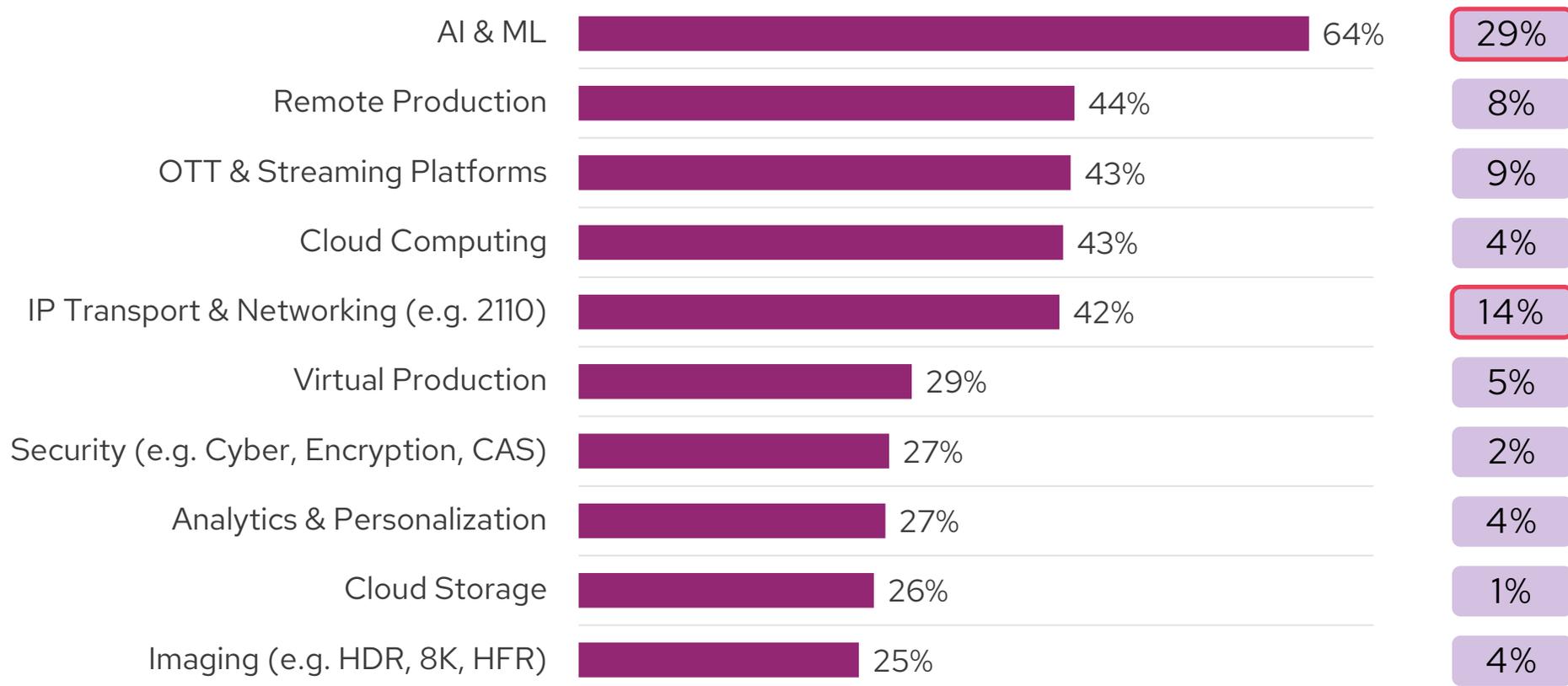


# MediaTech Investment

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



## Technology Roadmap Priorities (Top10)



All Industry



Main Priority

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

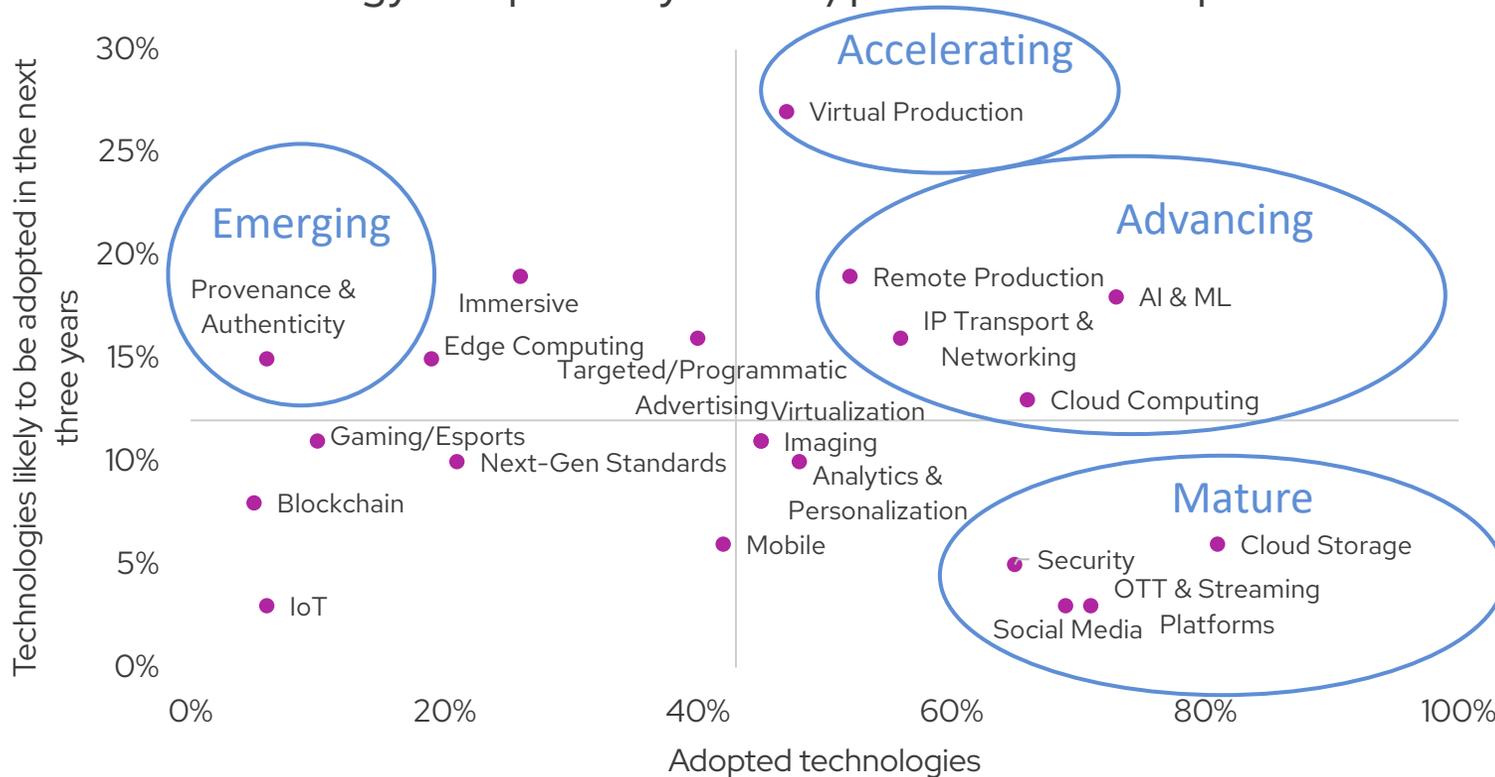
Source: IABM MediaTech Industry Tracker

# MediaTech Investment

Cloud and OTT move into mature stages of adoption



Technology adoption by media/production companies



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)

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)

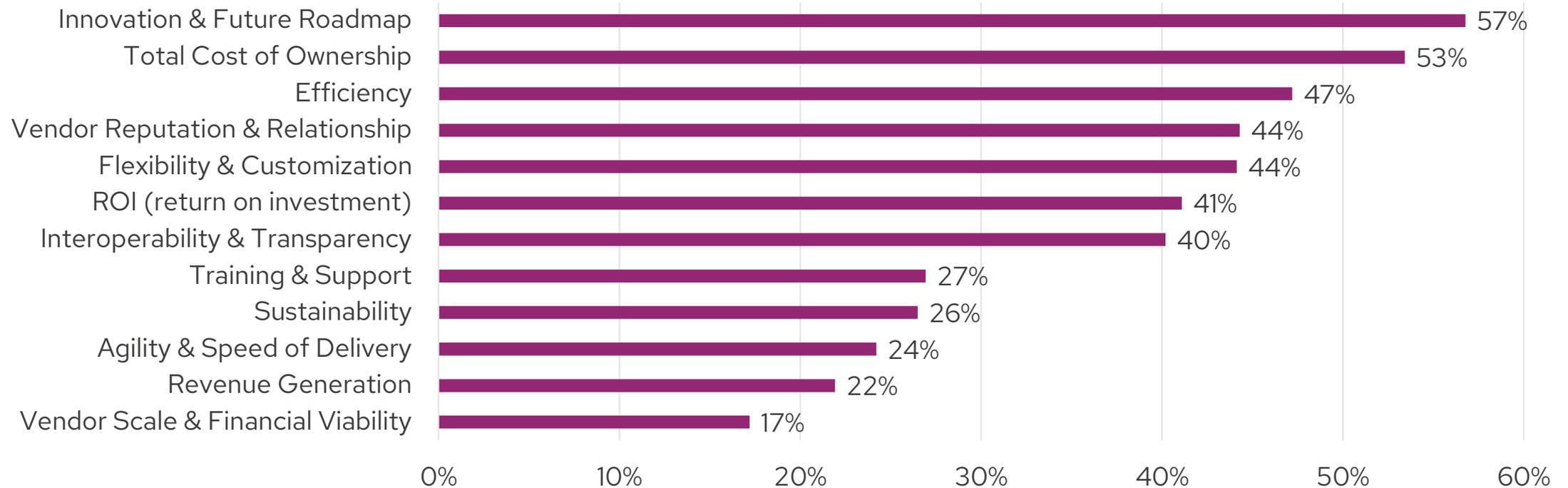
Source: IABM MediaTech Industry Tracker

# MediaTech Investment

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



## Technology Purchasing Factors



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

Source: IABM MediaTech Industry Tracker

# MediaTech Investment

Flexibility, scalability and efficiency are driving the adoption of MediaTech



## 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%					
	Analytics & Personalization						39%	33%
Cloud	Cloud Computing	31%		50%				
	Cloud Storage	28%		45%				
	Virtualization			24%				
IP	IP Transport & Networking	33%		33%				
Remote Production	Remote Production	61%						
OTT	OTT & Streaming Platforms							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)

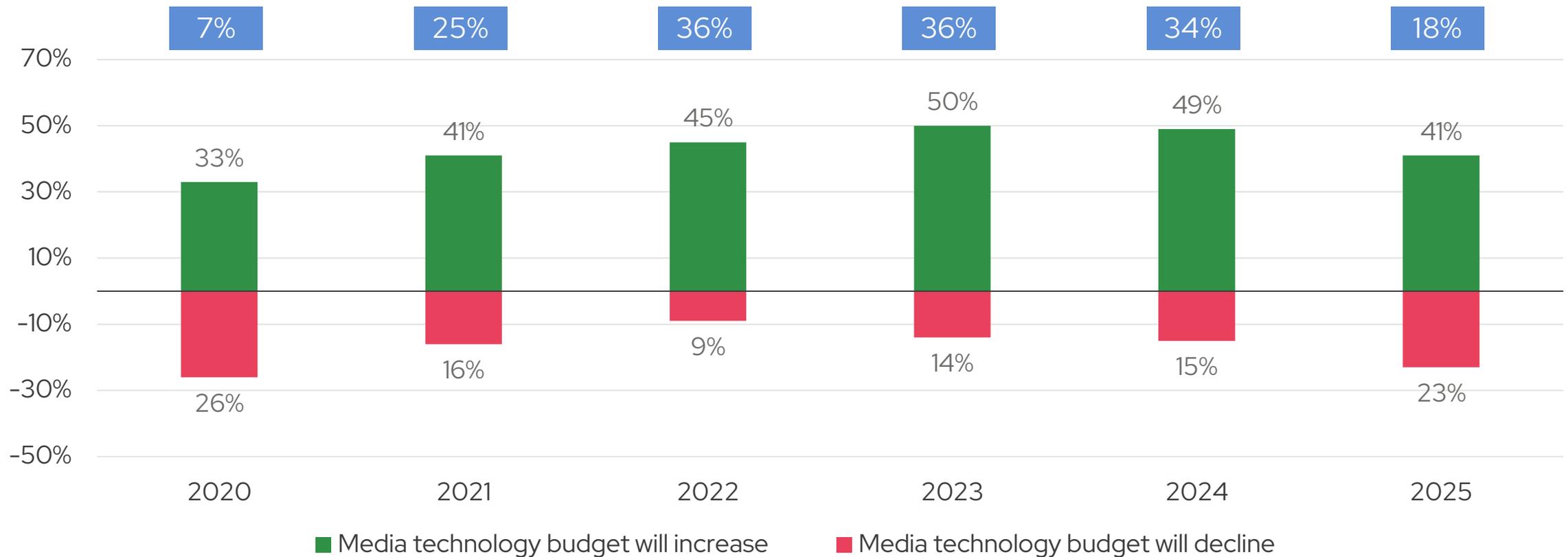
Source: IABM MediaTech Industry Tracker

# MediaTech Investment

Investment is expected to be more conservative in the year ahead



### MediaTech NET investment outlook



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

Source: IABM MediaTech Industry Tracker

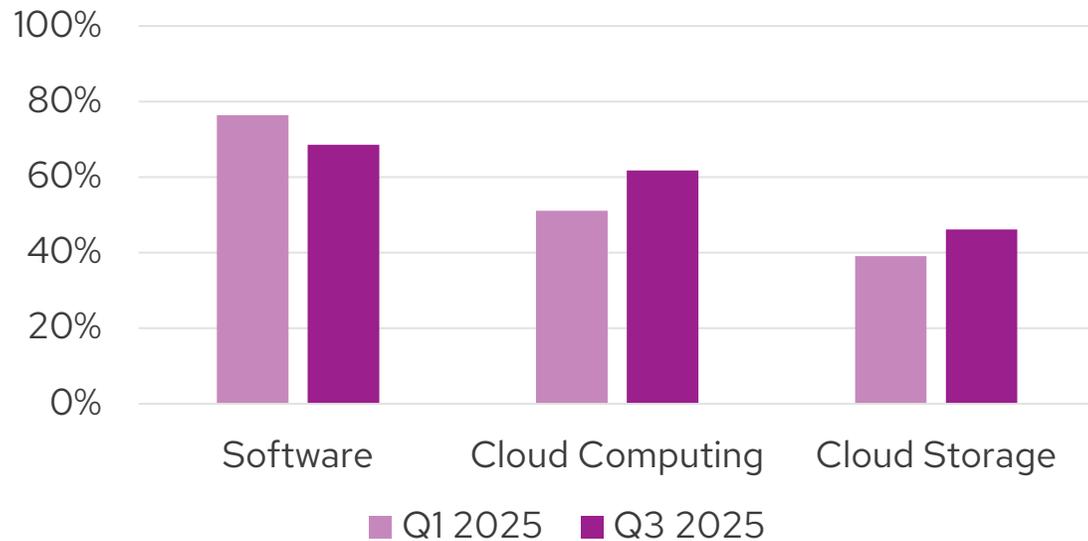
# MediaTech Investment

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



## Supplier revenue outlook

NET outlook (will increase minus will decline)

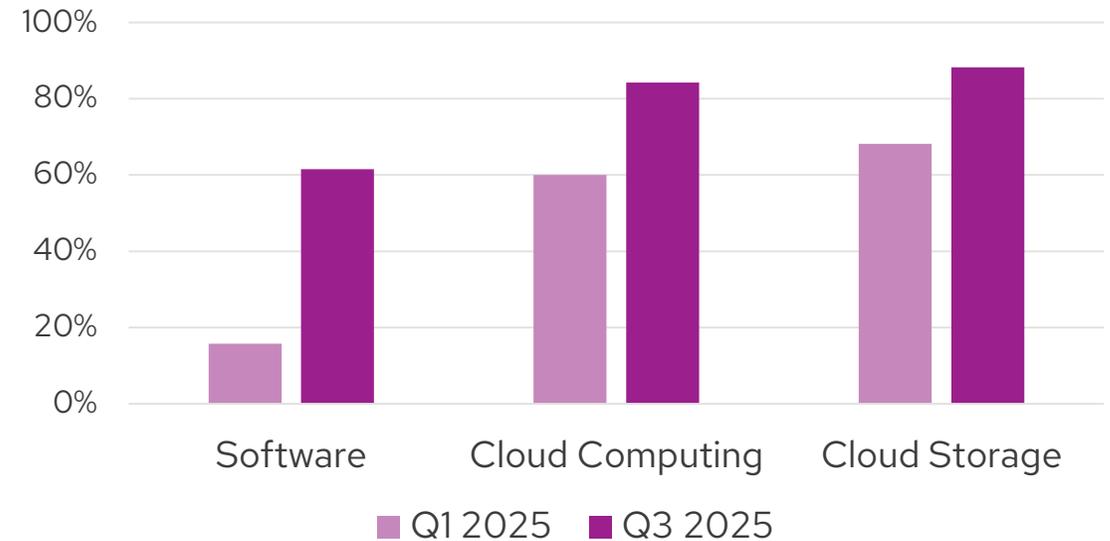


Q. What is your outlook for your organization's different types of technology revenues over the next year? (media technology vendors, sample size - from 23 to 72)



## End user investment outlook

NET outlook (will increase minus will decline)



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

Source: IABM MediaTech Industry Tracker

# MediaTech Investment

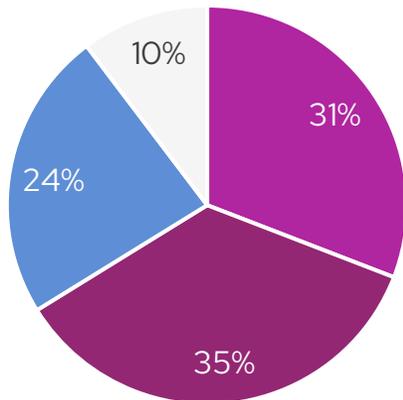
Usage-based pricing became dominant payment model for cloud



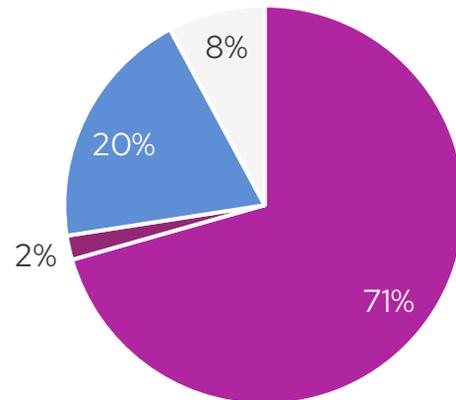
## Preferred payment models

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.

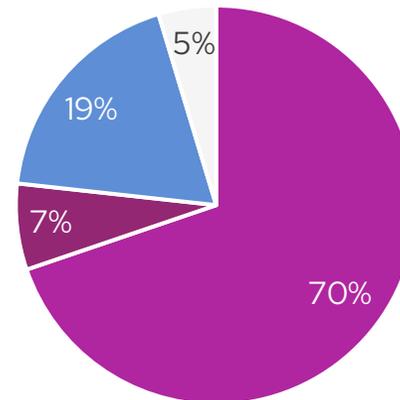
Software



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.

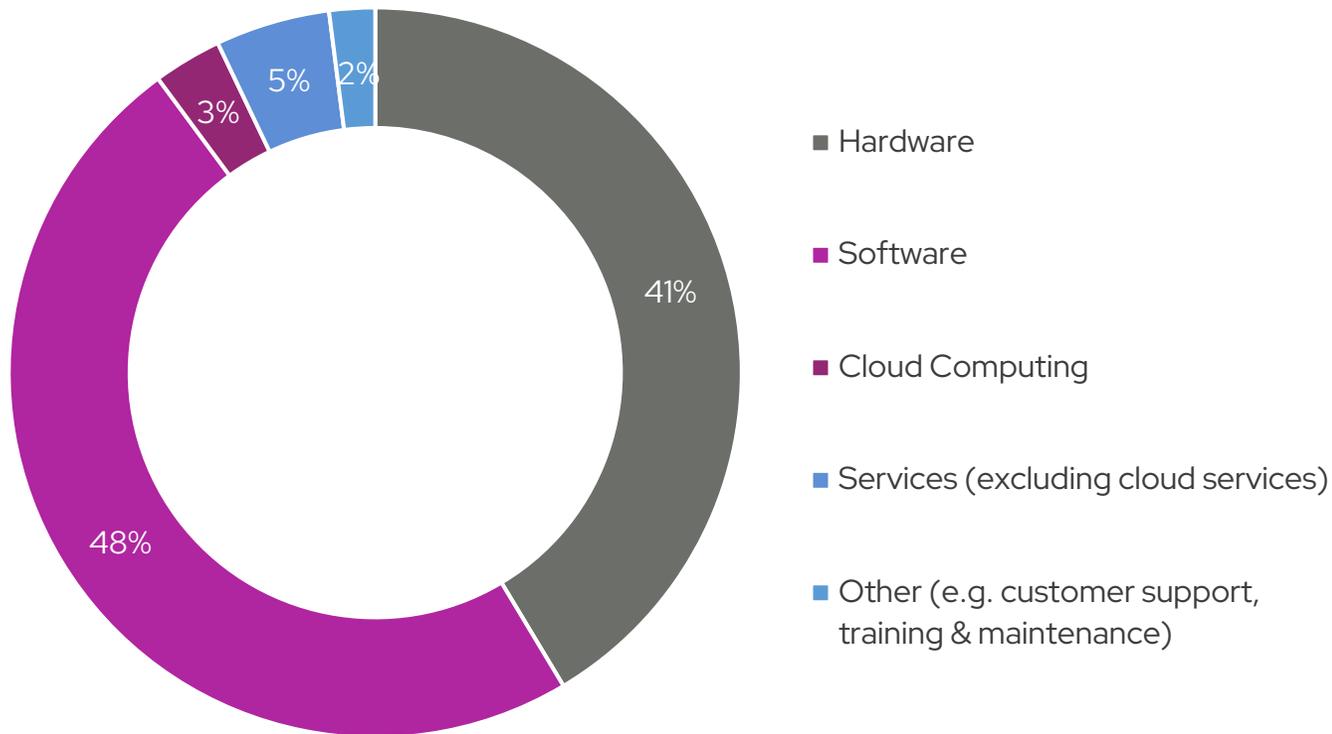
Source: IABM MediaTech Industry Tracker

# MediaTech Business Models

Opportunity for software catalysed by Media eXchange Layer initiative



Supply-side primary revenue sources 2025



## Innovation in Software-Defined Applications for Media Production

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

Source: IABM MediaTech Industry Tracker

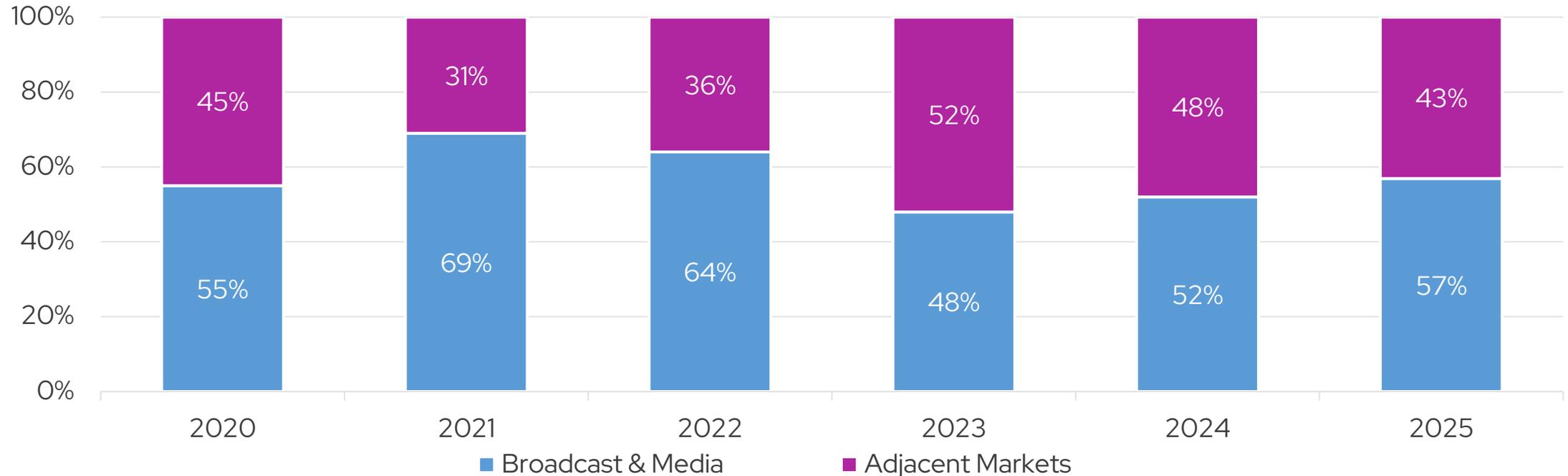
# MediaTech Business Models

Broadcast & media business improves while parallel markets remain important



Media Technology Vendors

Average % share of MediaTech supplier revenues by source



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

Source: IABM MediaTech Industry Tracker

# MediaTech Investment

Read IABM's latest megatrend report "Security in MediaTech Ecosystems"



## 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

# Shaping the Global MediaTech Landscape

Common threads in this keynote



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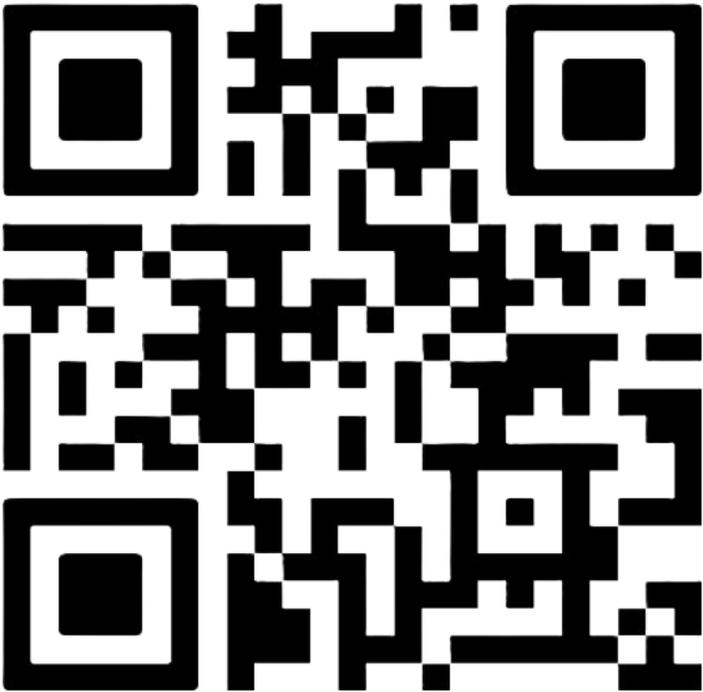
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IABM Business Intelligence Unit



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**Anna Yokota**  
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