



State of MediaTech

IABM Business Intelligence Unit



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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

Featured Report Content

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Insights featured in this presentation are curated from IABM's Business Intelligence report portfolio



State of MediaTech

Twice Annual Flagship report – Latest Edition Published at IBC



Security in MediaTech Ecosystems

Megatrend Report – Available Now



TechTracker

Annual Tracker Report – Available Now

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.

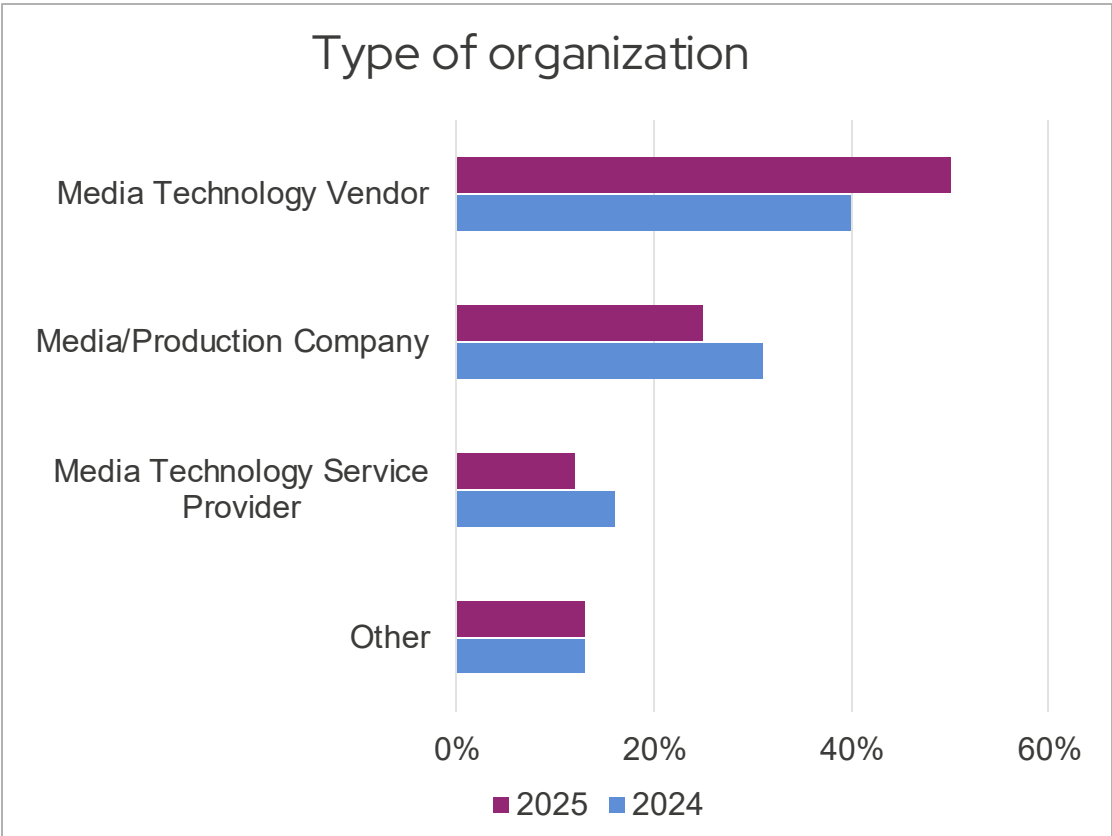
Secondary Research

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.

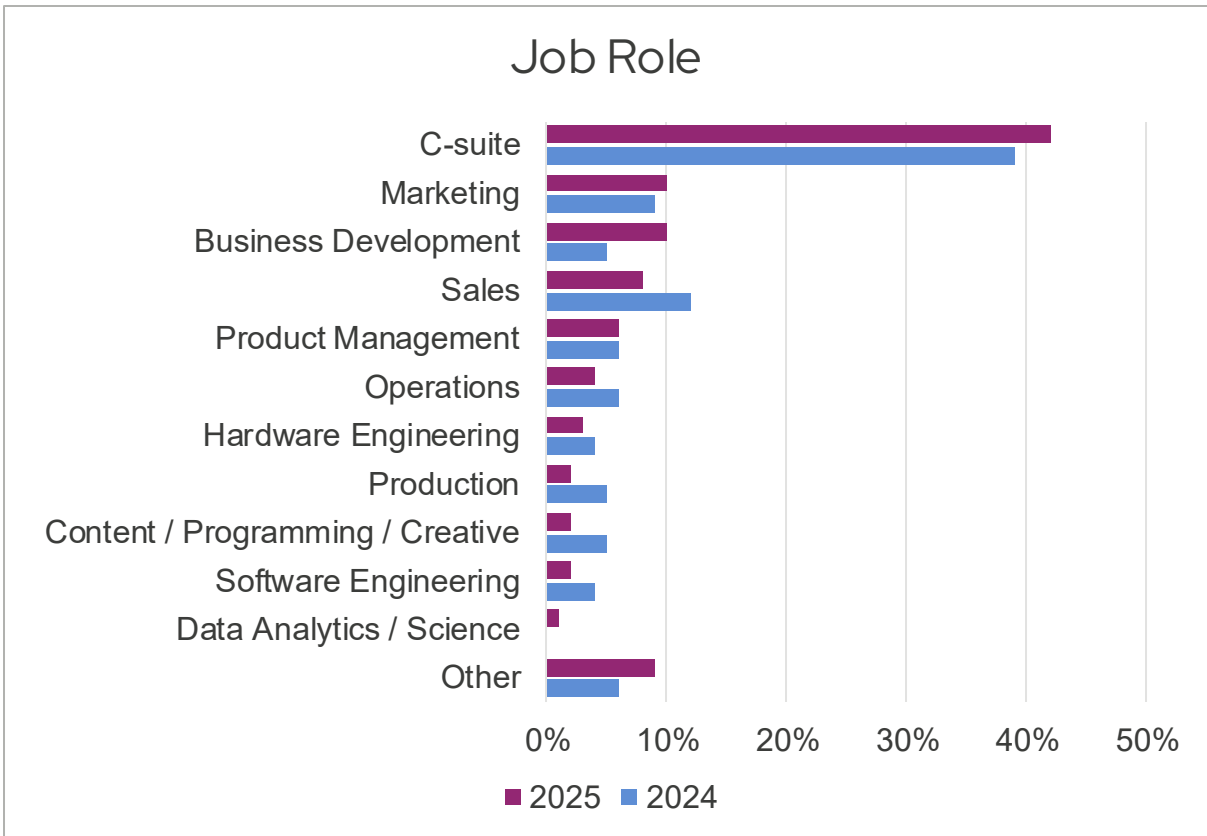
MediaTech Industry Tracker

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

Source: IABM MediaTech Industry Tracker



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

State of MediaTech Report

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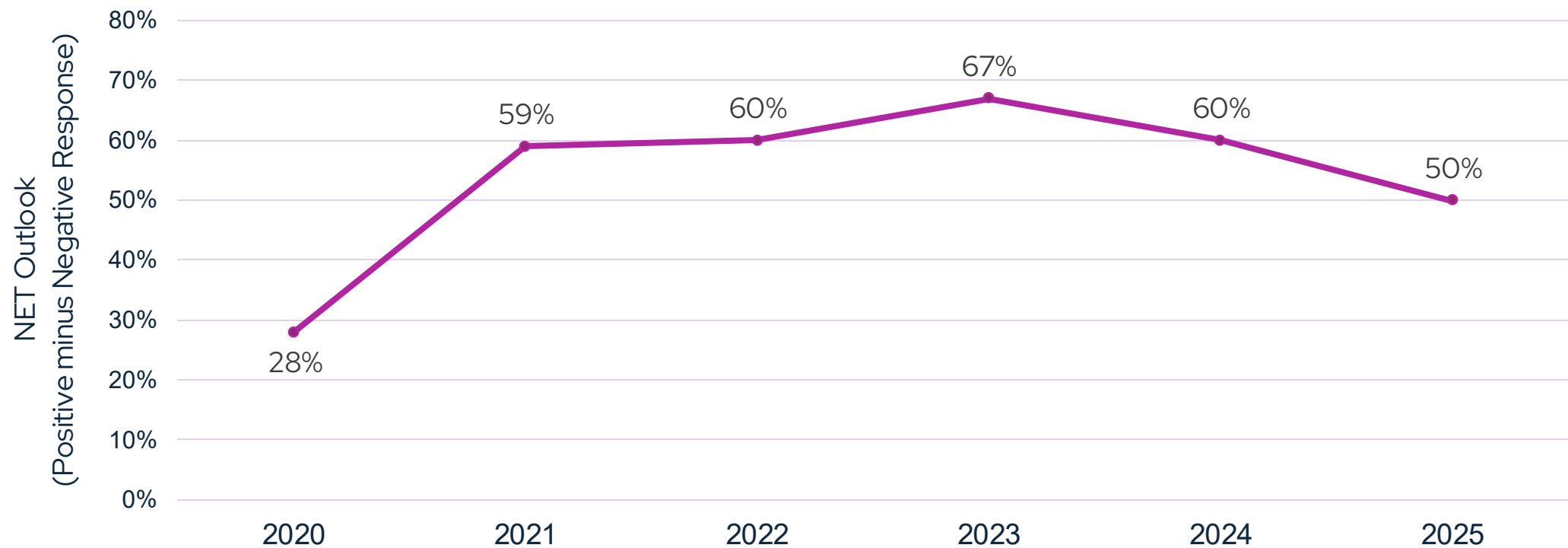
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Business Environment

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)

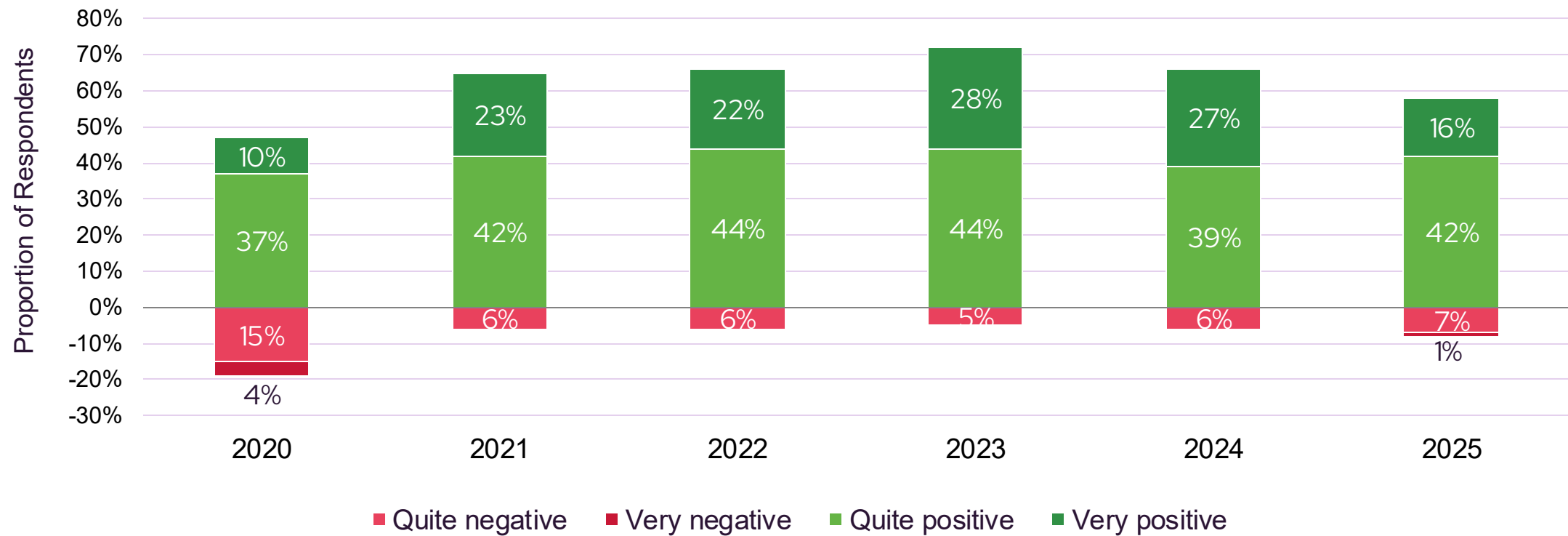
Source: IABM MediaTech Industry Tracker

Business Environment

Strength of positivity in business environment outlook has lessened



MediaTech Business Environment Outlook

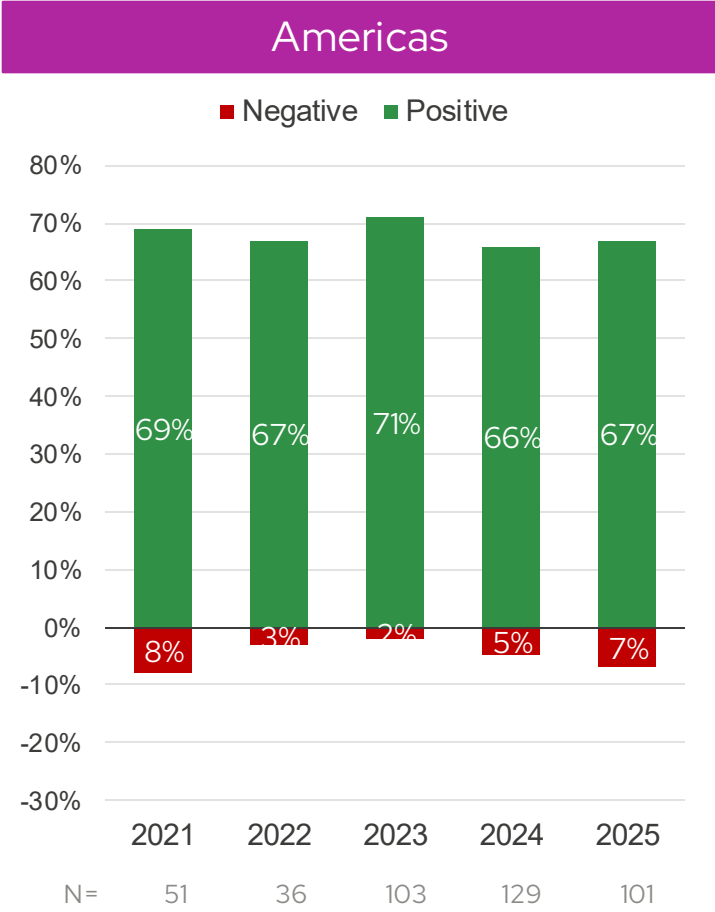
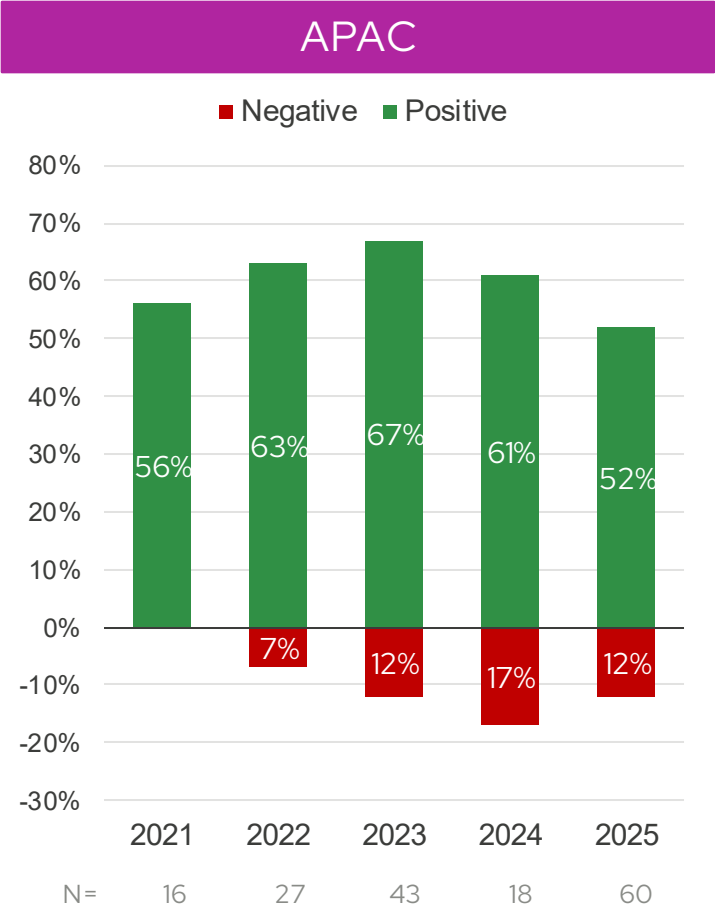
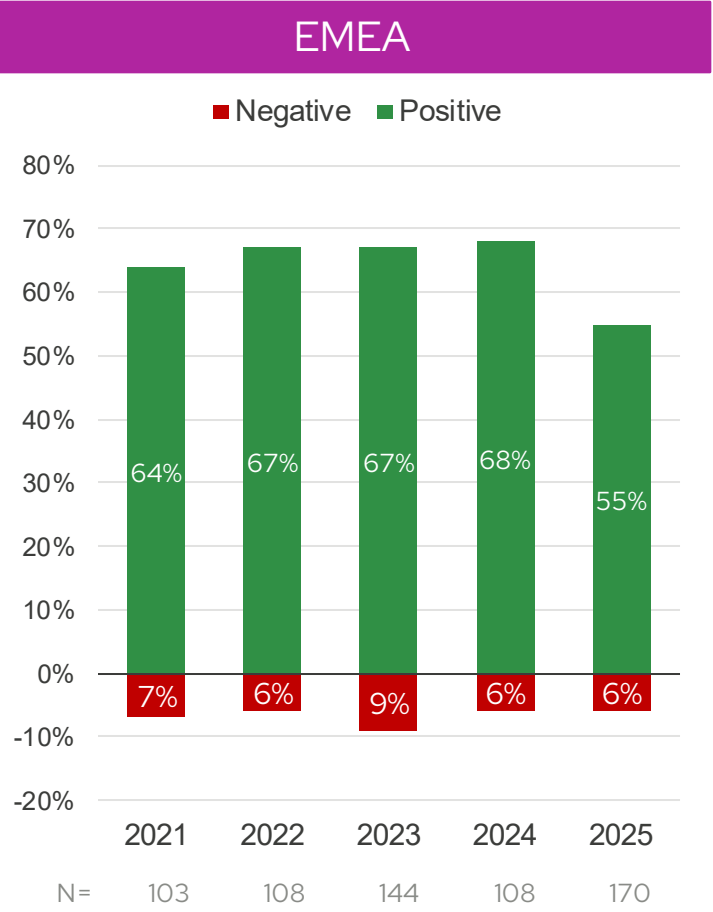


Q. What is your organization's outlook for the overall business environment over the next year? (All Industry)

Source: IABM MediaTech Industry Tracker

Business Environment

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



Source: IABM MediaTech Industry Tracker

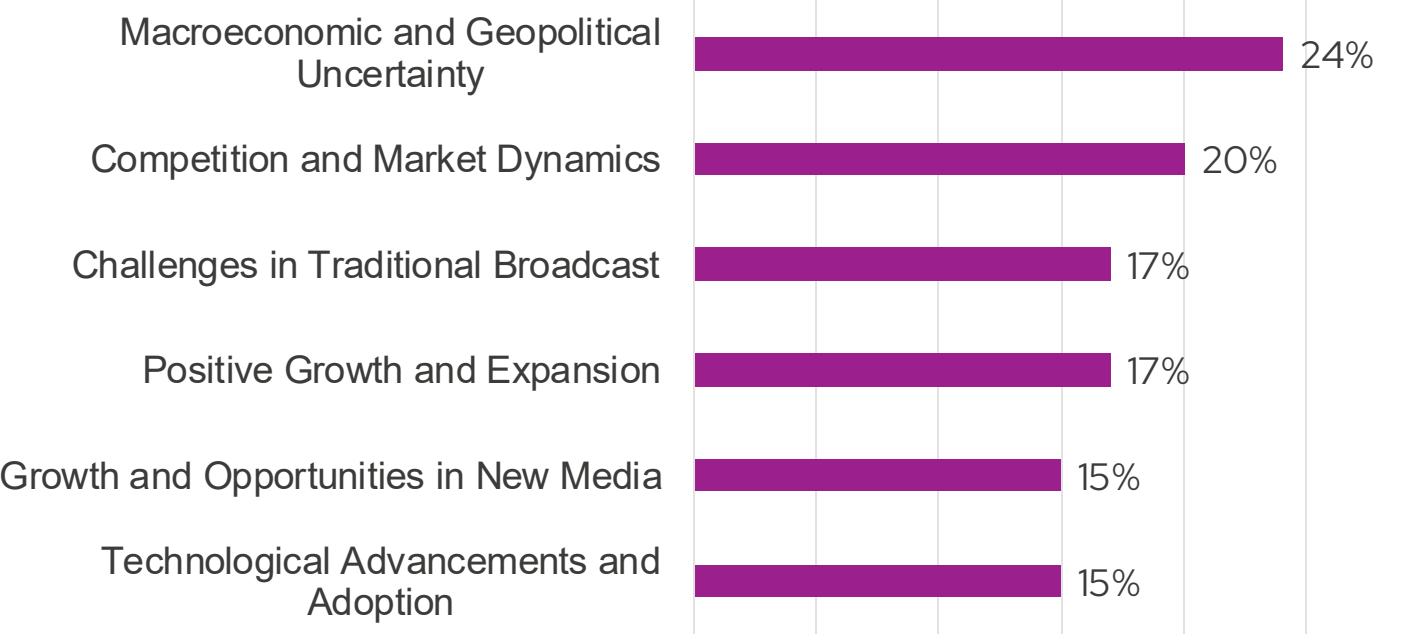
Q. What is your organization’s outlook for the overall business environment over the next year?

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...”*

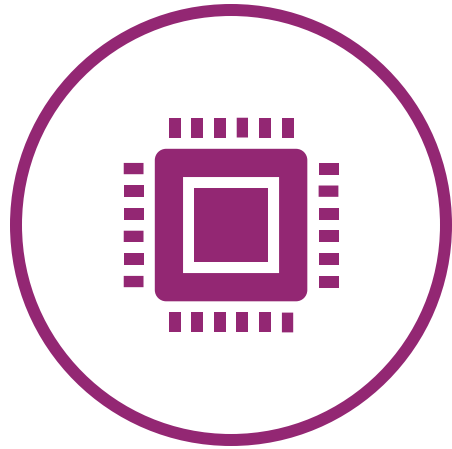
*“The industry seems energized and coming out of the supply issues which created excess inventory that has almost been burned through. **Macroeconomics and geopolitics are a big uncertainty** for everyone though.”*

*“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?



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)

NETFLIX

Business Environment

Media leadership on diverging paths to transformation



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)



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

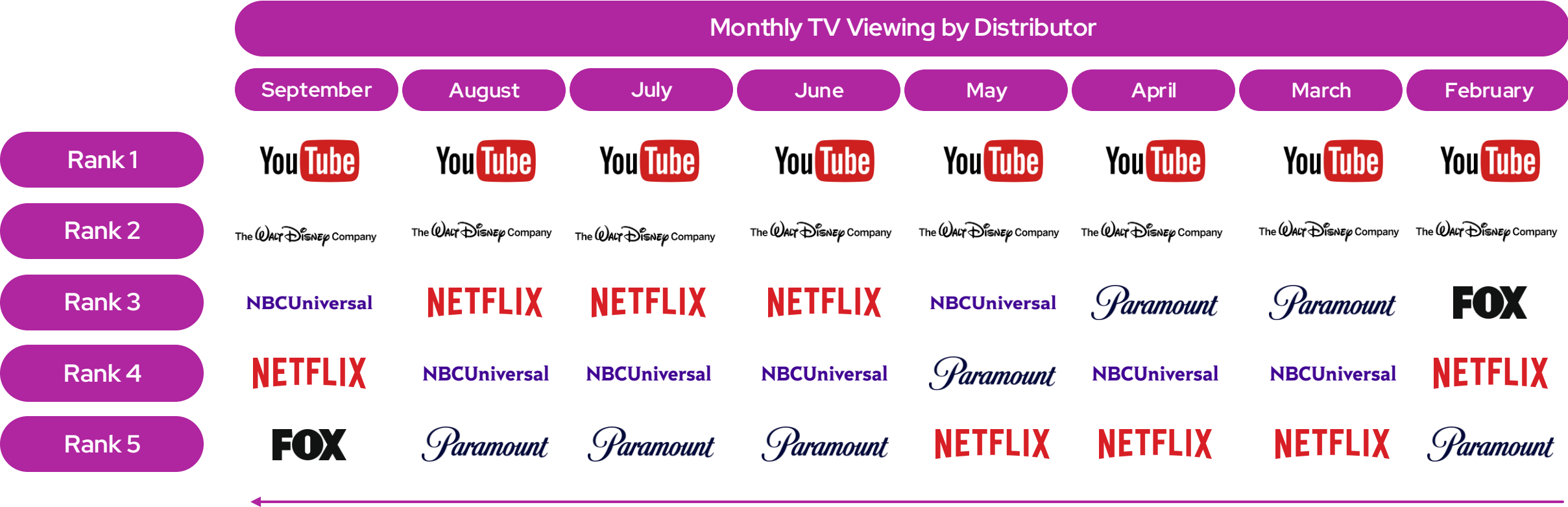
Together, RTL and Sky will be in an even stronger position to invest in people, content and technology in Germany and in Europe to compete with the global tech and streaming players.

Thomas Rabe, CEO
RTL Group
(June 2025)



Business Environment

YouTube Now Consistently Leads US TV Viewing

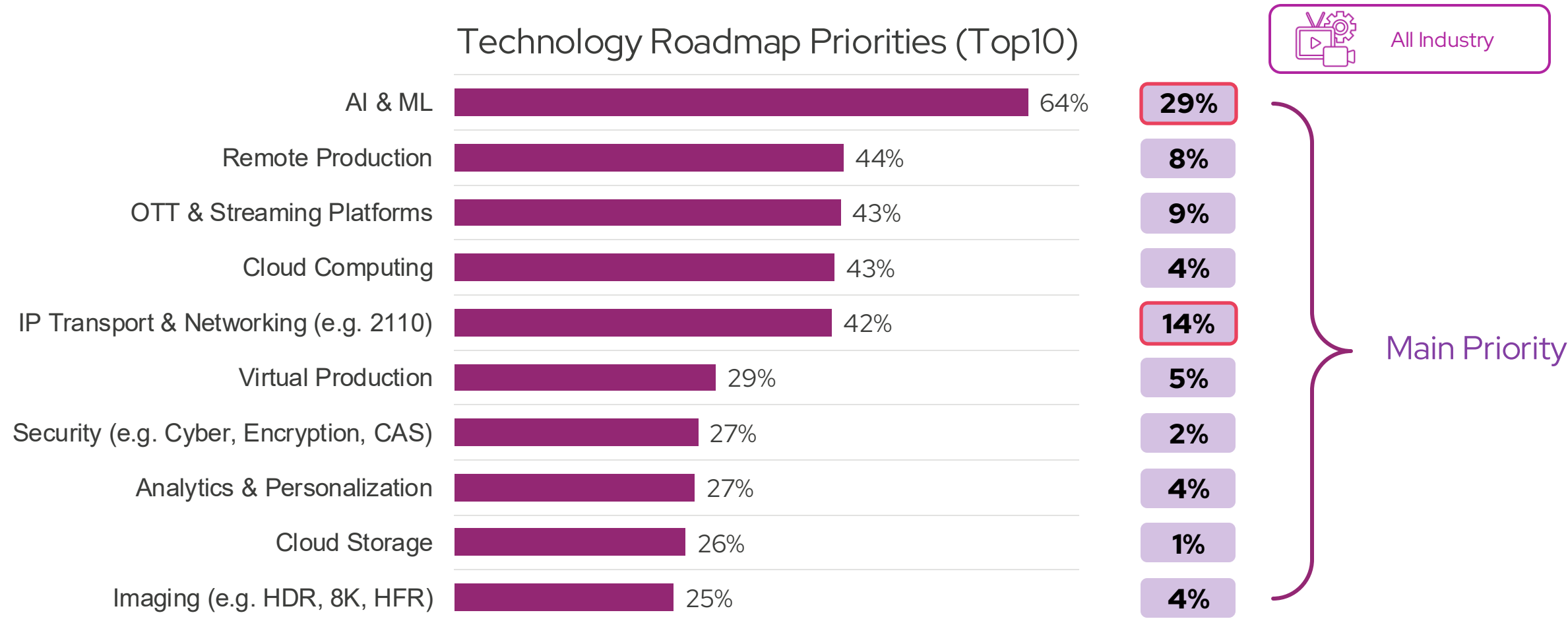


After superseding all competing media distributors for the first time in terms of monthly viewing share on TVs in the US in July 2024, YouTube has established a consistent leadership over the past six months. Advertisers are recognising YouTube as a destination for longer form advertising and annual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

Source: Nielsen Gauge

MediaTech Investment

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



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

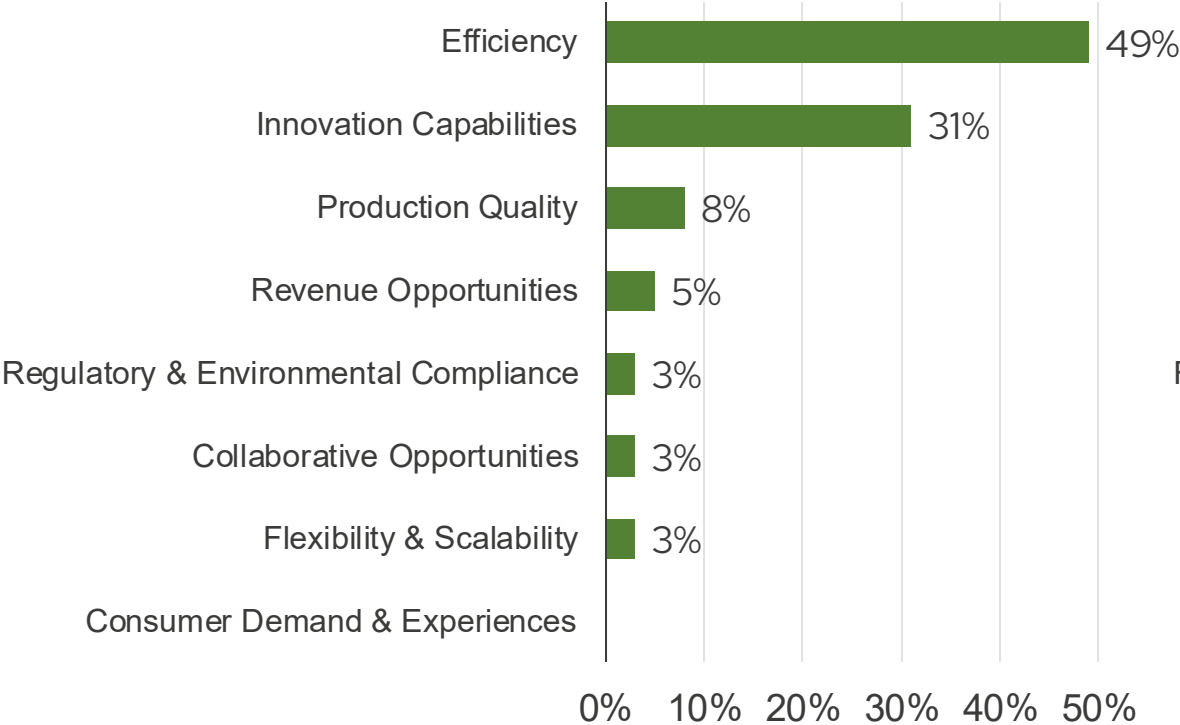
Source: IABM MediaTech Industry Tracker

MediaTech Investment

The adoption of AI is driven by efficiency and innovation capabilities

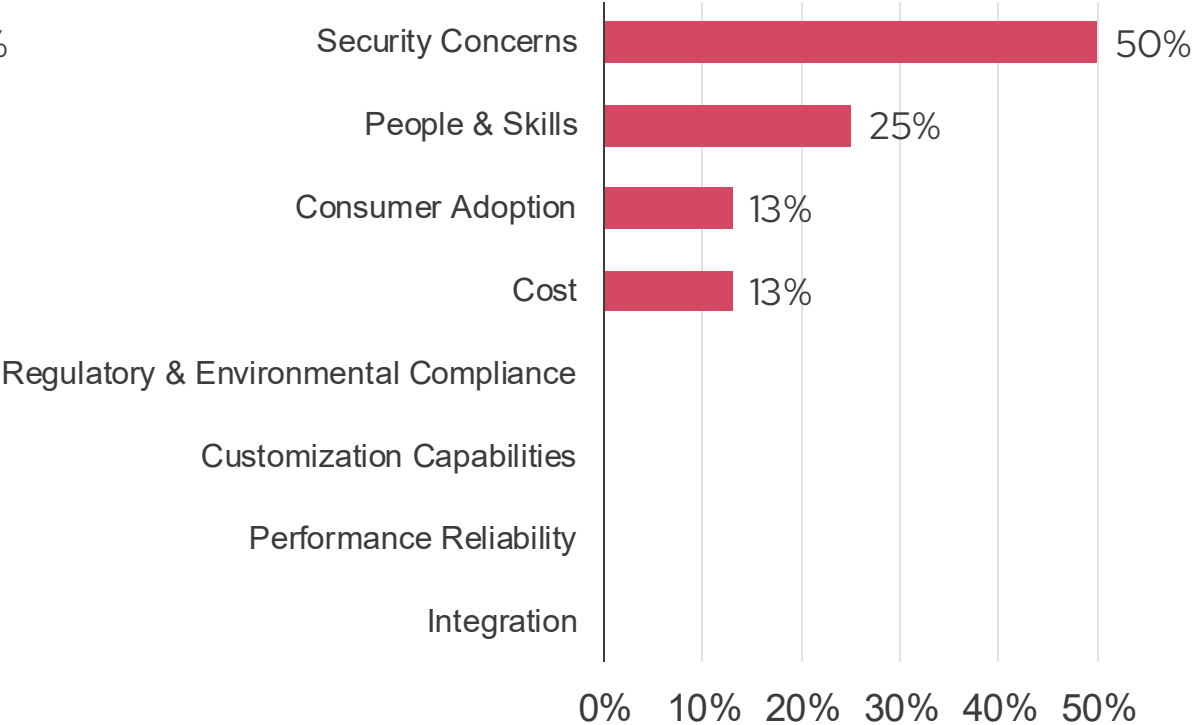


Drivers of AI & ML adoption



Q. Please select the most important driver of adoption for each of the following technologies?
(All Industry, 2025, n=39)

Constraints for AI & ML adoption



Q. Please select the most important constraint for adoption for each of the following technologies. (All Industry, 2025, n=34)

Source: IABM MediaTech Industry Tracker

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.

Sima Levy – CEO
Actus Digital
(July 2025)



Source: IABM, Actus Digital

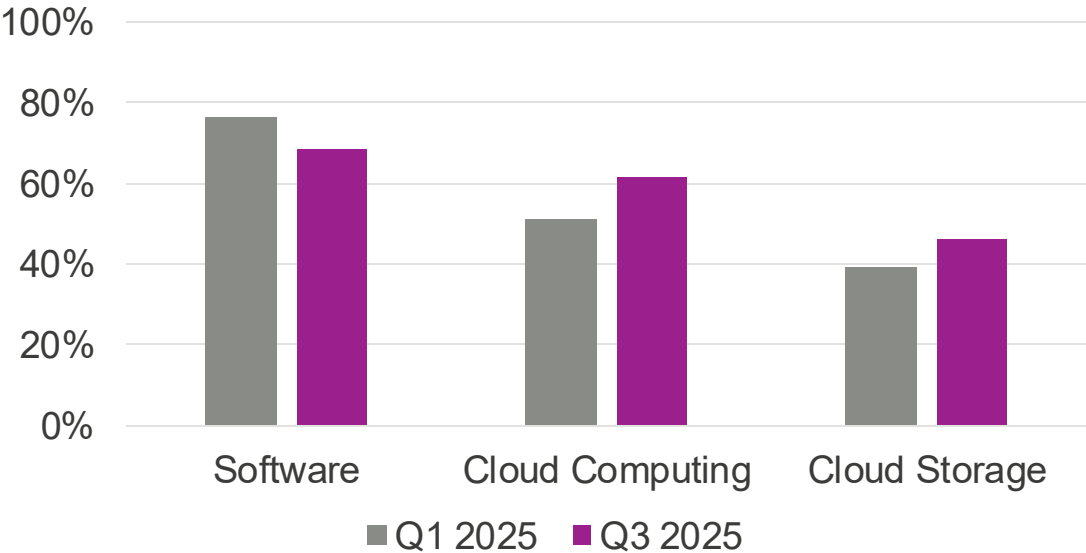
MediaTech Investment

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



Supplier revenue outlook

NET outlook (will increase minus will decline)

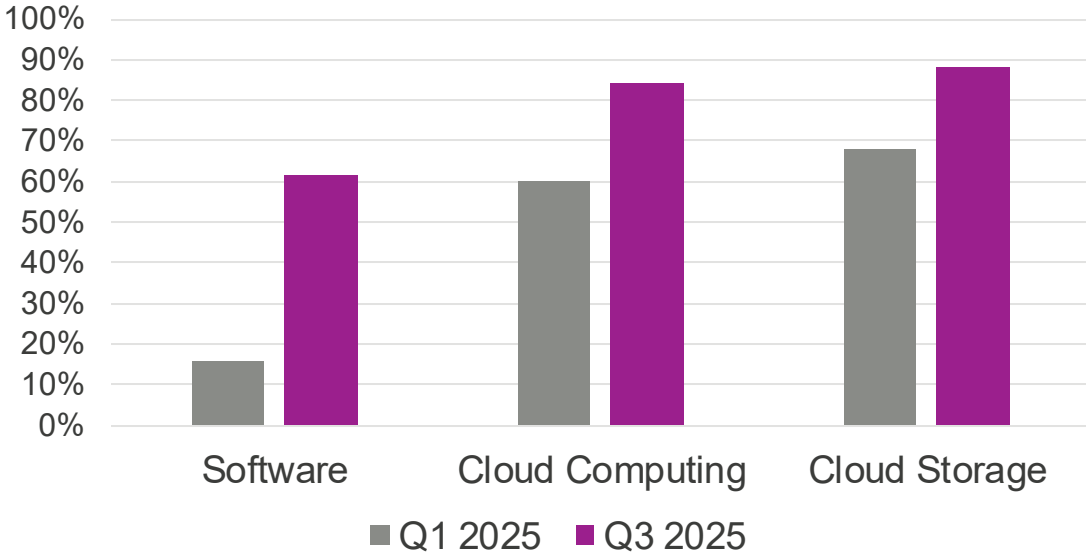


Q. What is your outlook for your organization's different types of technology revenues over the next year? (media technology vendors, sample size - from 23 to 72)



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

TechAnalysis – Cloud Availability

AWS European Sovereign Cloud



€7.8bn

Projected timeline: 2025-2040



€5.5bn

Projected timeline: 2026-2029

Regulatory pressure

2016: General Data Protection Regulation (GDPR)

2023: Digital Markets Act (DMA)

2025: European Data Act (EDA)

Geopolitical concerns

Geopolitical concerns and increasing regulatory demands emphasize the strategic importance of regional data sovereignty in Europe.

Operational requirements

The European Sovereign Cloud is expected to accelerate adoption of cloud-based production and AI adoption due to lower compliance barriers.



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

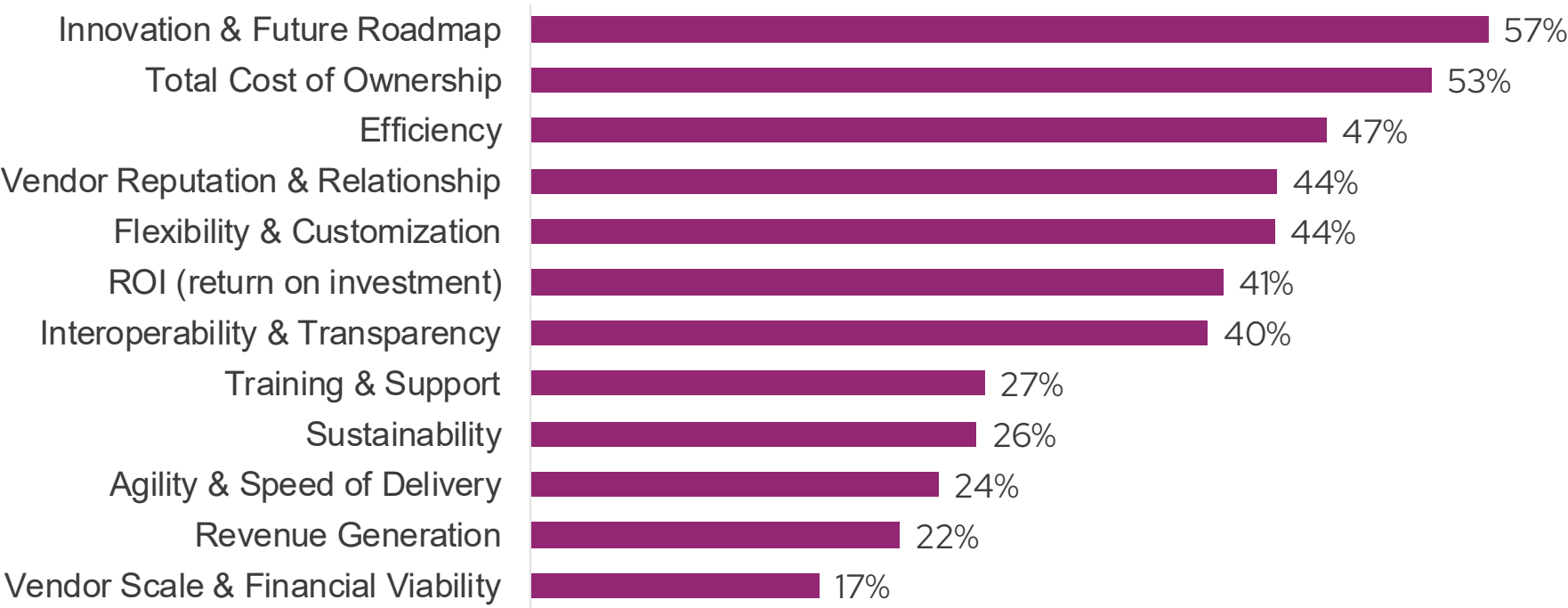


Fostering
collaboration

Source: IABM Security in MediaTech Ecosystems Megatrend Report



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)

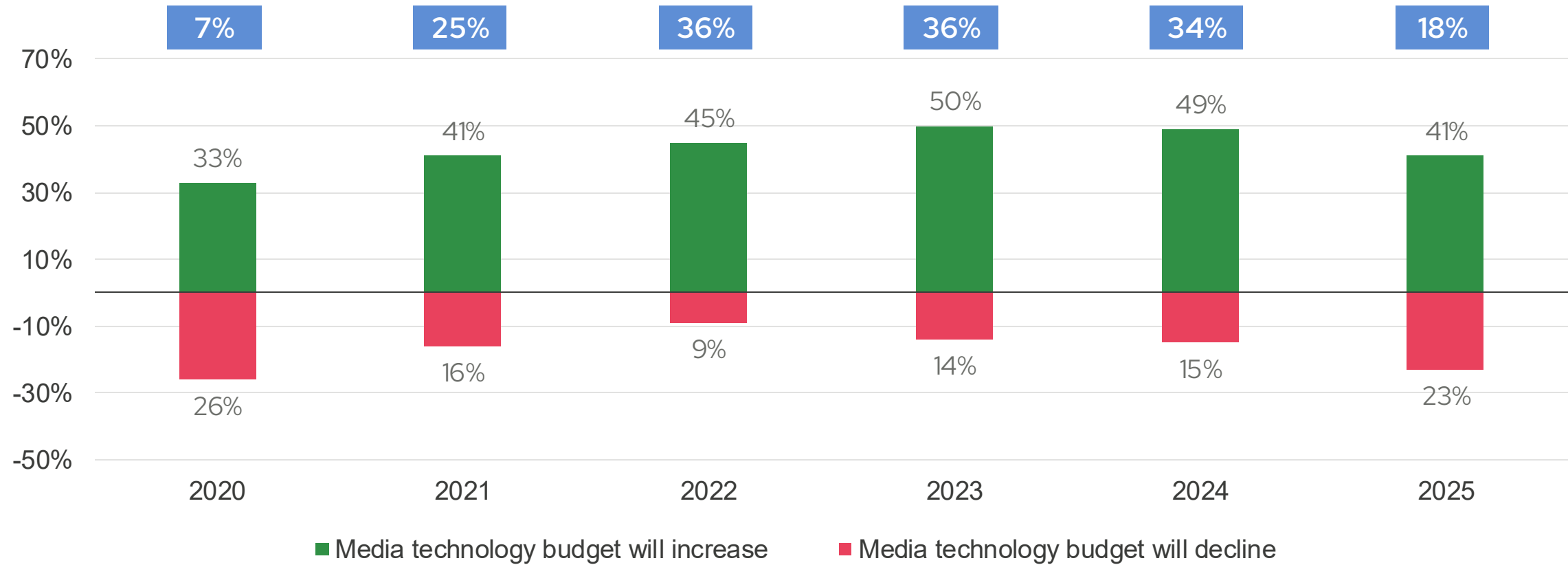
Source: IABM MediaTech Industry Tracker

MediaTech Investment

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)

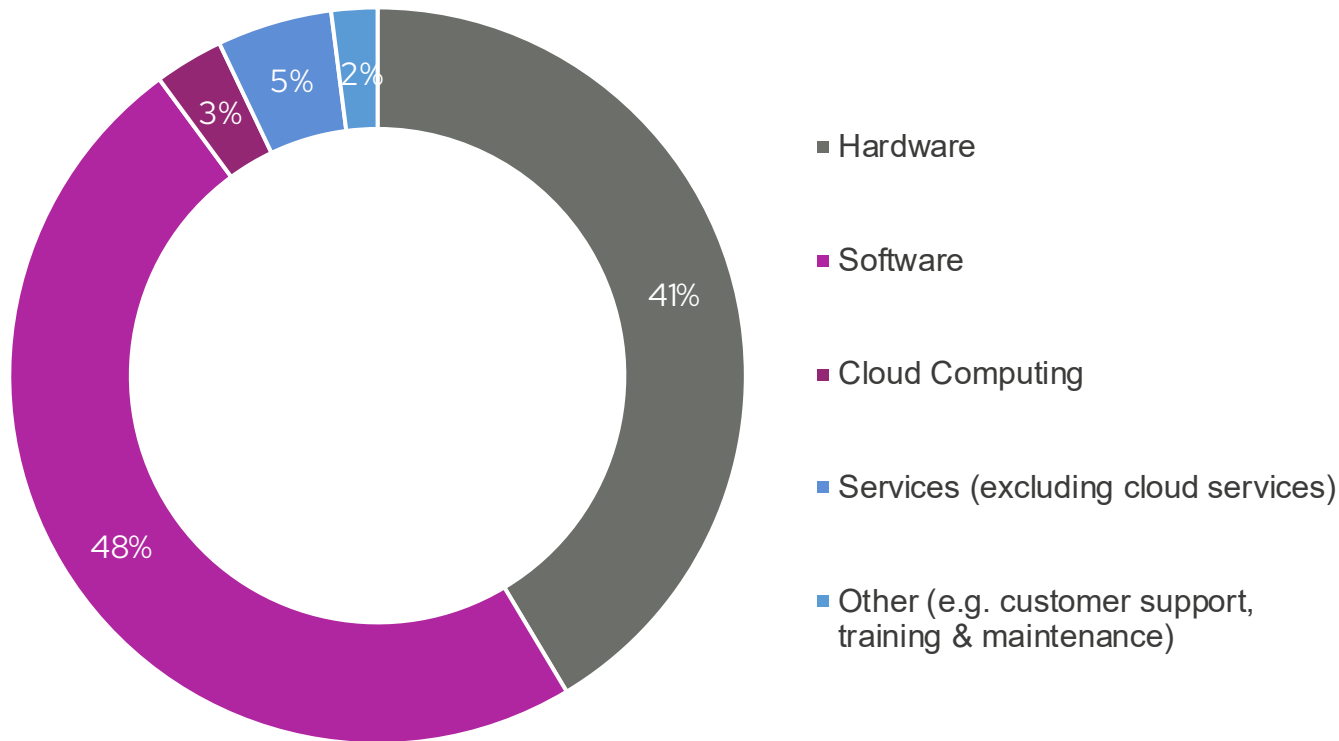
Source: IABM MediaTech Industry Tracker

MediaTech Business Models

Opportunity for software catalysed by Media eXchange Layer initiative



Supply-side primary revenue sources 2025



Innovation in Software-Defined Applications for Media Production

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

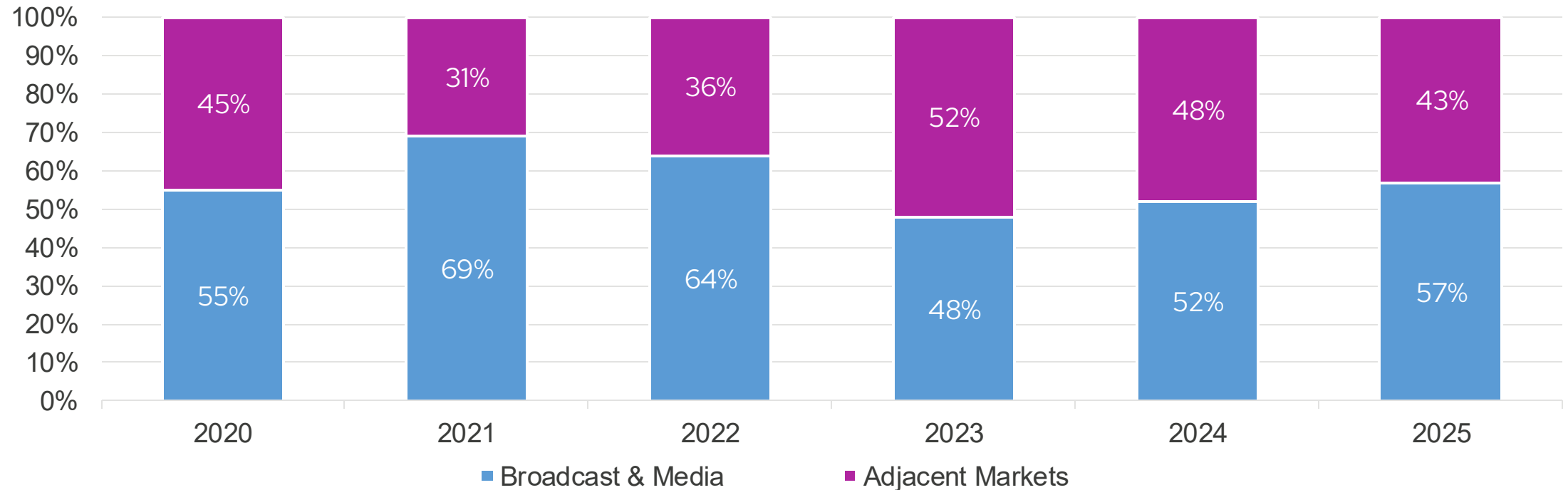
Source: IABM MediaTech Industry Tracker

MediaTech Business Models

Broadcast & media business improves while parallel markets remain important



Average % share of MediaTech supplier revenues
by source

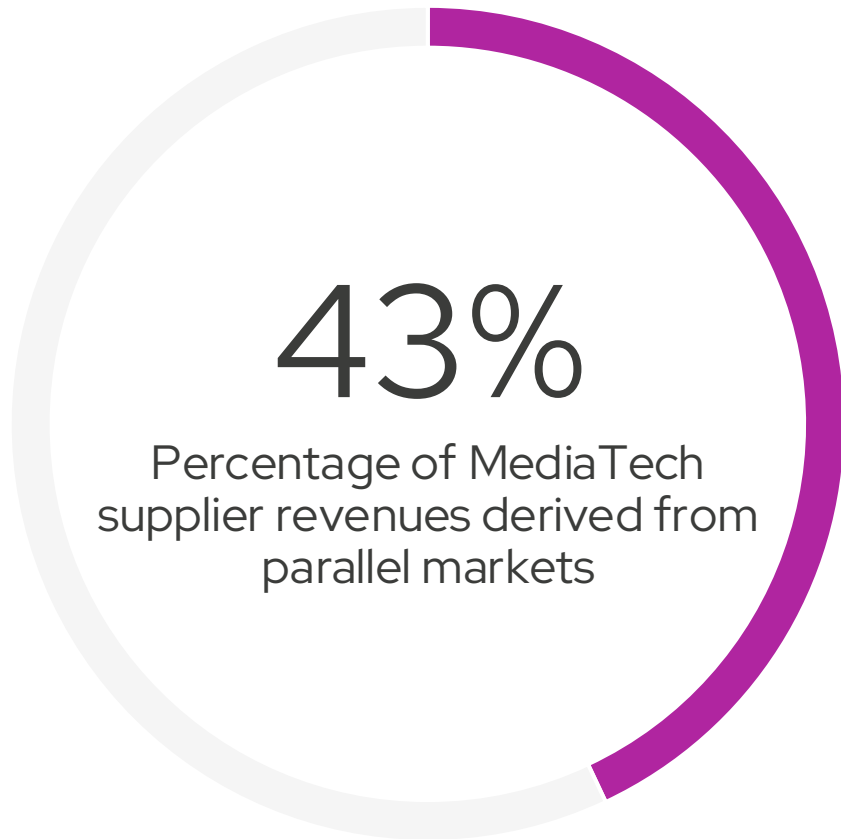


Q. What percentage of your company's revenues are derived from sales to broadcast and media customer types (broadcasters, streaming platforms etc.)? (Media technology suppliers)

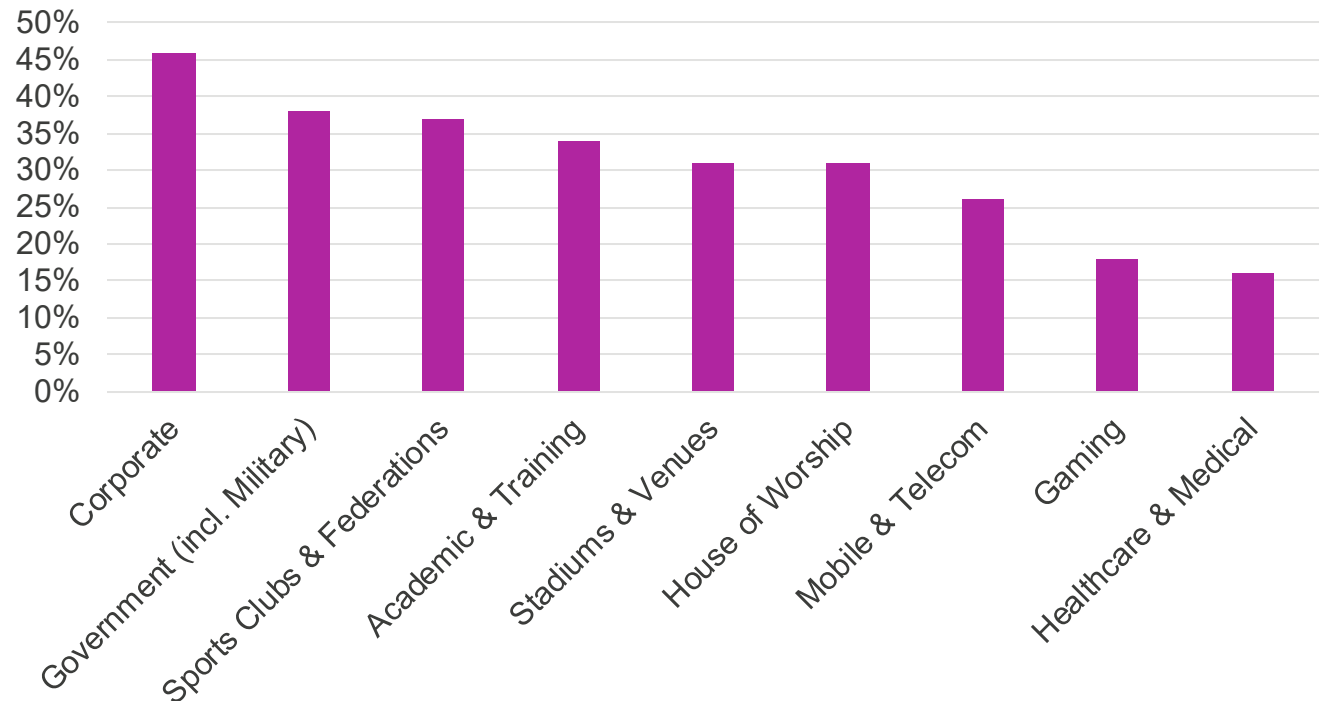
Source: IABM MediaTech Industry Tracker

MediaTech Business Models

Parallel markets represent a diverse landscape, with no single dominant vertical



Proportion of MediaTech suppliers generating revenue from adjacent verticals

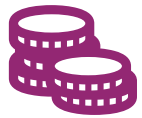


Q. What are your organization's revenue segments? (Media technology suppliers, 2025)

Source: IABM MediaTech Industry Tracker

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