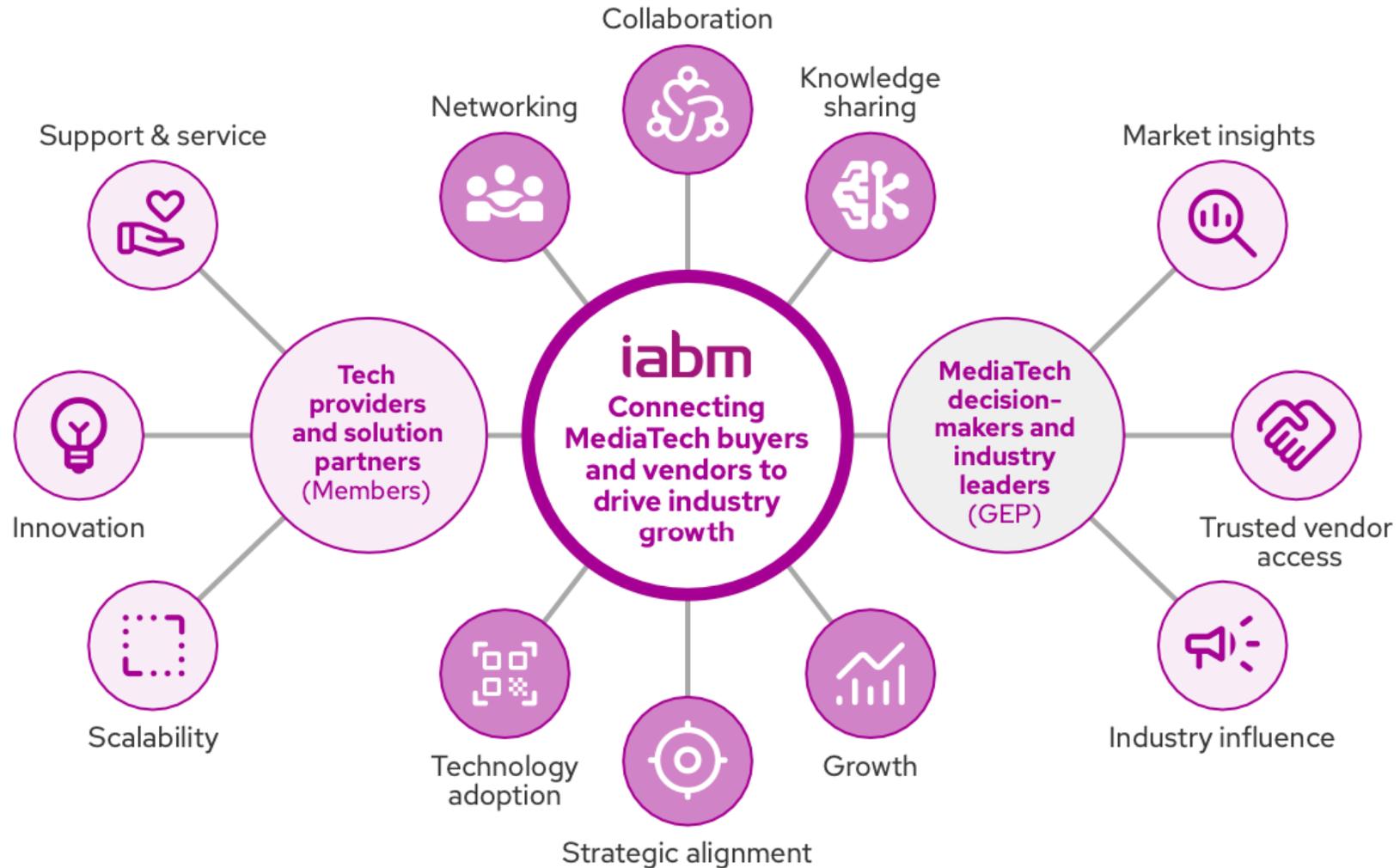




Market Insights from IABM to Inform  
Your Broadcast AV Strategy  
Broadcast AV Summit - ISE 2026  
IABM Business Intelligence Unit

# IABM Ecosystem and Community

How IABM helps to connect, support and inform the MediaTech ecosystem



# IABM Ecosystem and Community

Shape your future with IABM

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## Business Intelligence

The IABM Business Intelligence Unit provides **strategic market visibility** for MediaTech through **data-driven reports and exclusive expert insights.**

## Training & Skills Development

Stay competitive with IABM's world-class training – future-ready talent starts here.

## CTO Office

We support you with the influence, guidance, and access needed to lead, not follow.

# IABM Panel Guests

Thought leadership in Broadcast AV

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**Chris Evans**  
Head of Business  
Intelligence



**Mark Carlisle**  
CEO  
Amino Communications



**Russell Leak**  
Senior Customer  
Success Manager  
Vizrt



**Rich Zabel**  
VP Media Supply Chain  
Diversified

# IABM Business Intelligence Methodology



This presentation 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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# IABM Business Intelligence Methodology

Featured research reports and insights



All data presented in this section comes from IABM's primary quantitative research.



## MediaTech Industry Tracker

Semi-annual tracking survey covering the period of 2020-2025



## Democratization of MediaTech

February-March, July-August 2024



## Broadcast AV Convergence

February-March, June-August 2025

Source: IABM

# Scan the QR Code

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# Shaping the Global MediaTech Landscape

Common threads in the State of MediaTech



## 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



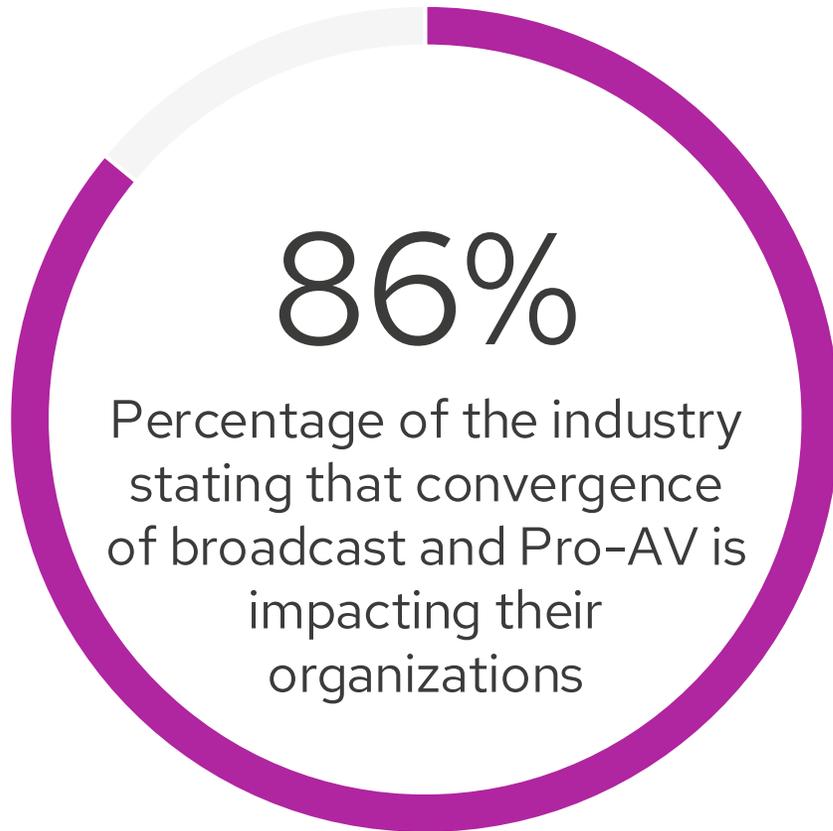
## Agility

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

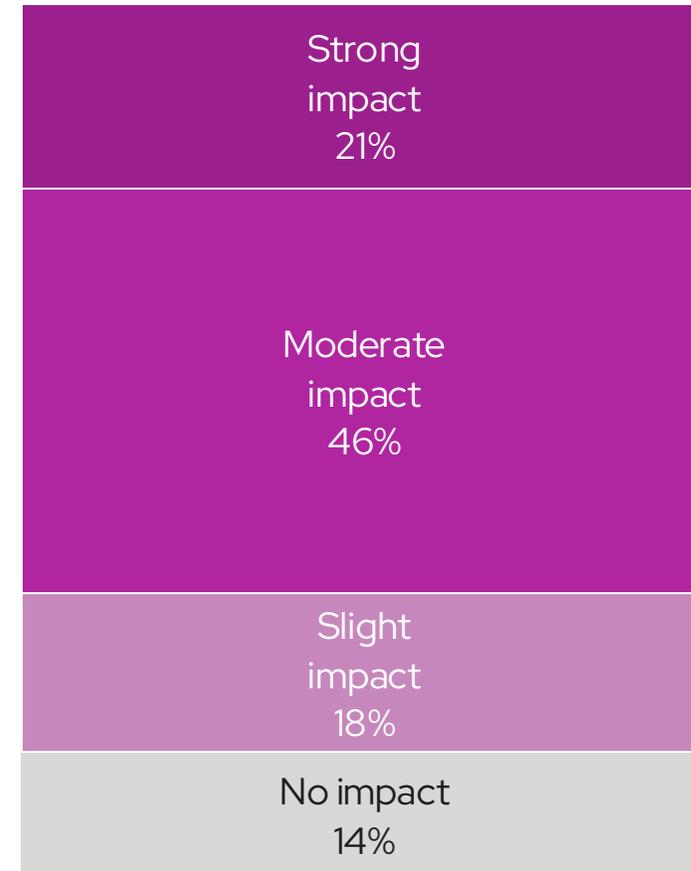
Source: IABM

# Broadcast AV Impact

Convergence trend highlighted by MediaTech vendors



Q. To what extent is Broadcast AV impacting your organization?



Source: IABM Broadcast AV Convergence Survey

# Broadcast AV Impact

Convergence is leading to market expansion



*“The convergence of Professional Audio-Visual (Pro AV) and broadcast technology is reshaping the landscape of enterprise media. It refers to the **blending of live, linear broadcast-quality video with the flexibility and interactivity of digital signage and enterprise AV** – all delivered over IP infrastructure.”*

*“As the traditional broadcast market is softening new **adjacent and peripheral markets offer opportunities to apply existing knowledge and experience into new verticals** helping to grow the business and recover the loss of revenue from broadcast.”*

Q. What does the concept of the convergence of pro AV and broadcast mean to you and your business? (Based on text analysis of open-ended responses)

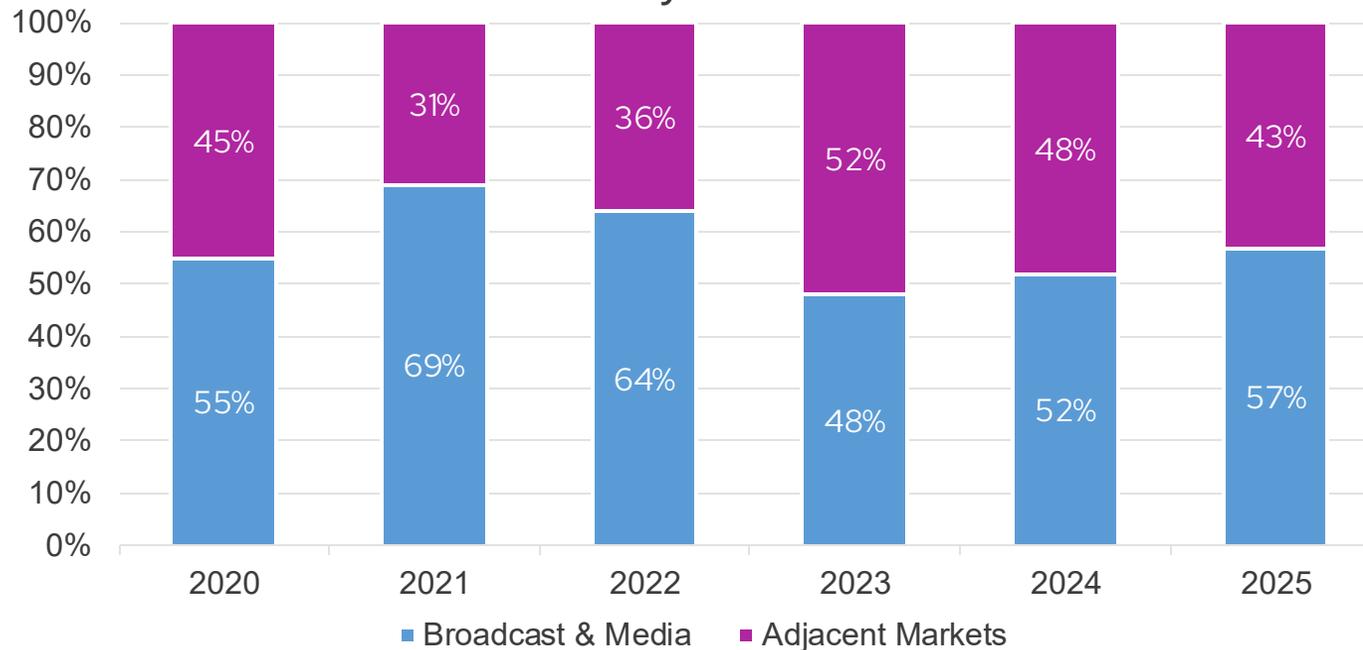
Source: IABM, Broadcast AV Convergence Survey

# MediaTech Business Models

Broadcast & media business improves while parallel markets remain important



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

**Adjacent Markets**  
Adjacent 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)

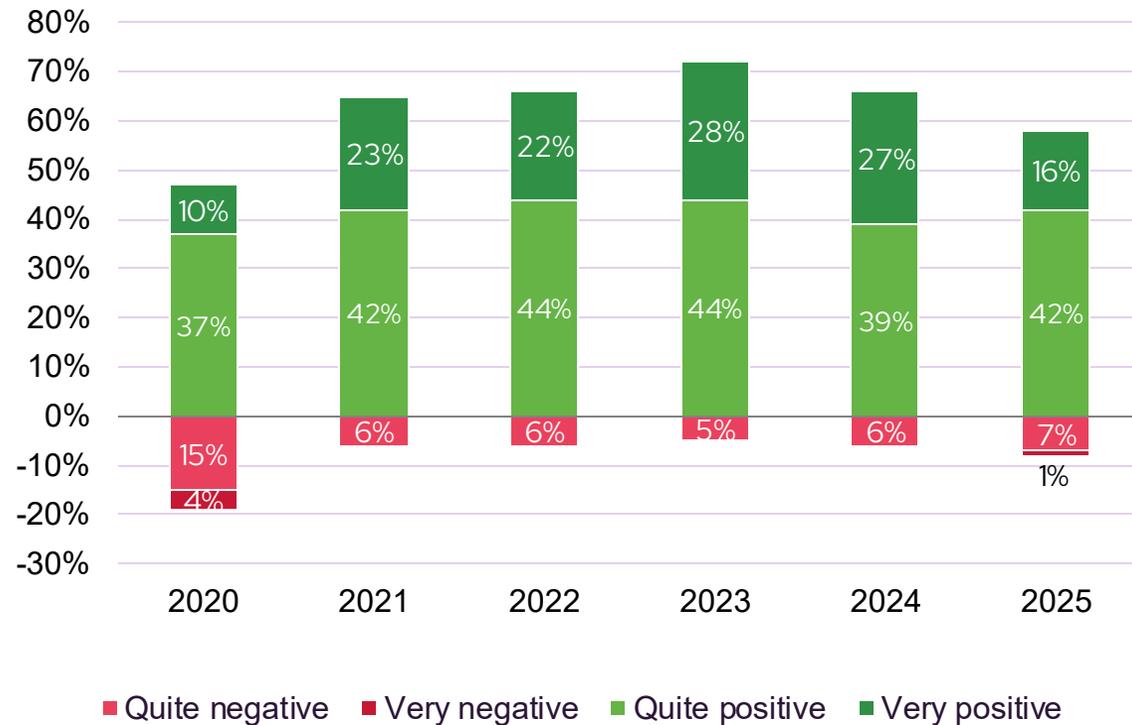
Source: IABM MediaTech Industry Tracker

# Business Environment

The business environment outlook has slightly worsened compared to last year



### MediaTech Business Environment Outlook



### MediaTech Business Environment NET Outlook



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

# Business Environment Outlook

Vendors serving adjacent markets see a more positive outlook

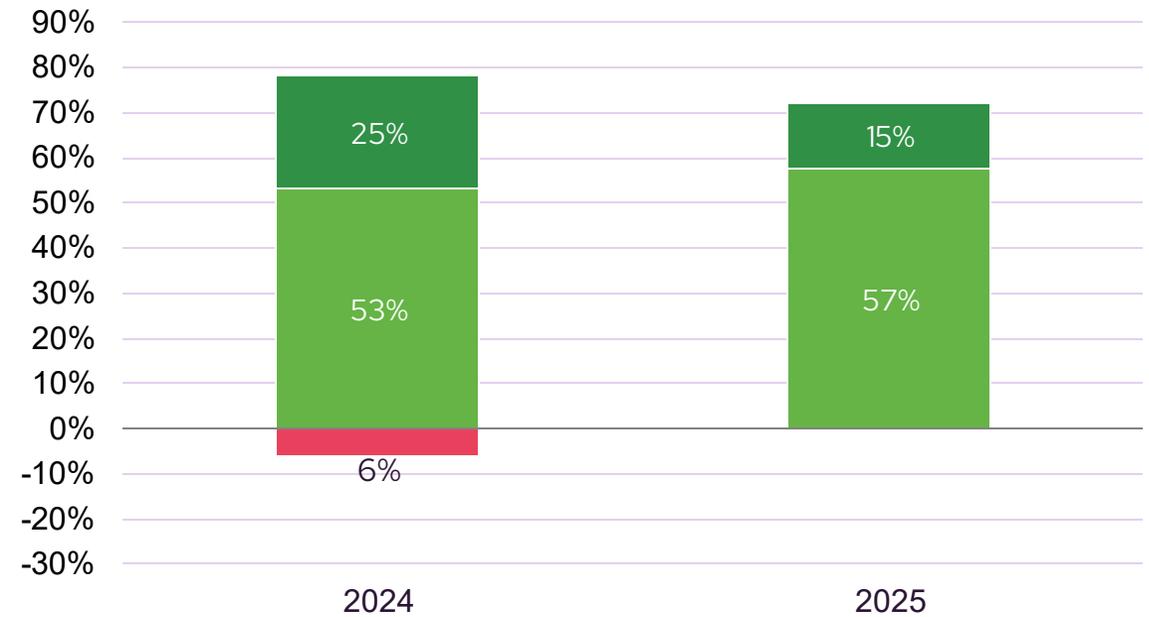


### MediaTech Business Environment Outlook (Broadcast & Media is primary revenue source)



■ Quite negative ■ Very negative ■ Quite positive ■ Very positive

### MediaTech Business Environment Outlook (Adjacent markets is primary revenue source)



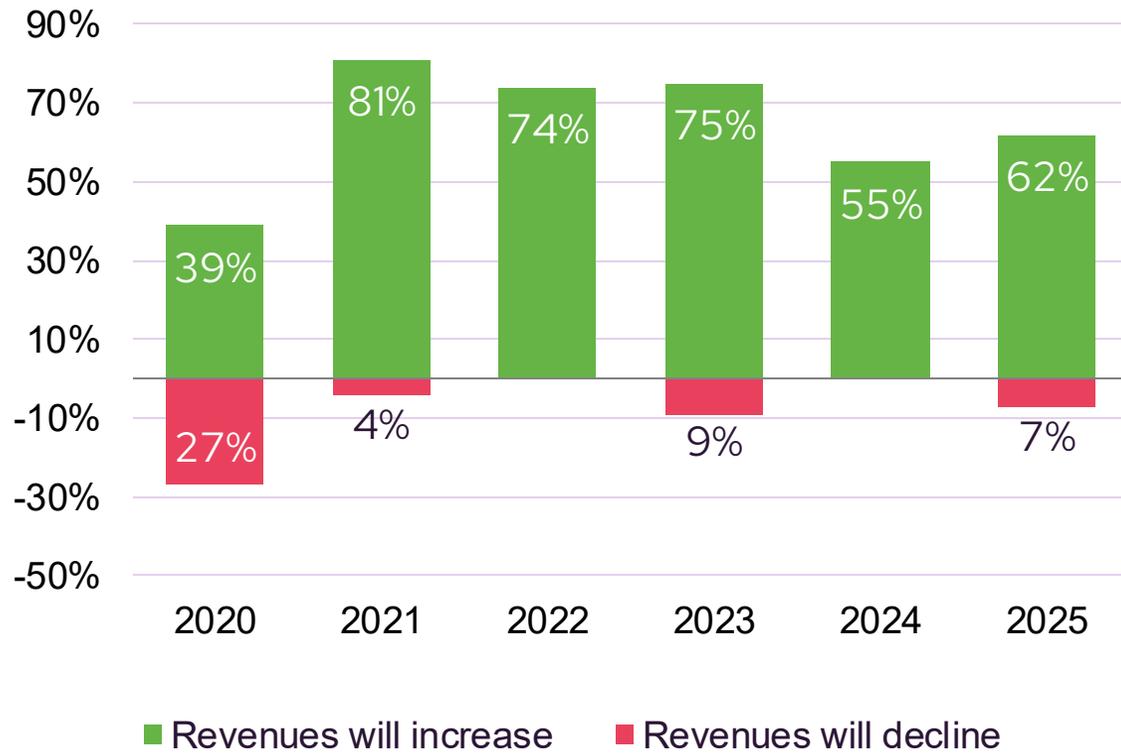
■ Quite negative ■ Very negative ■ Quite positive ■ Very positive

# Revenue Outlook Comparison

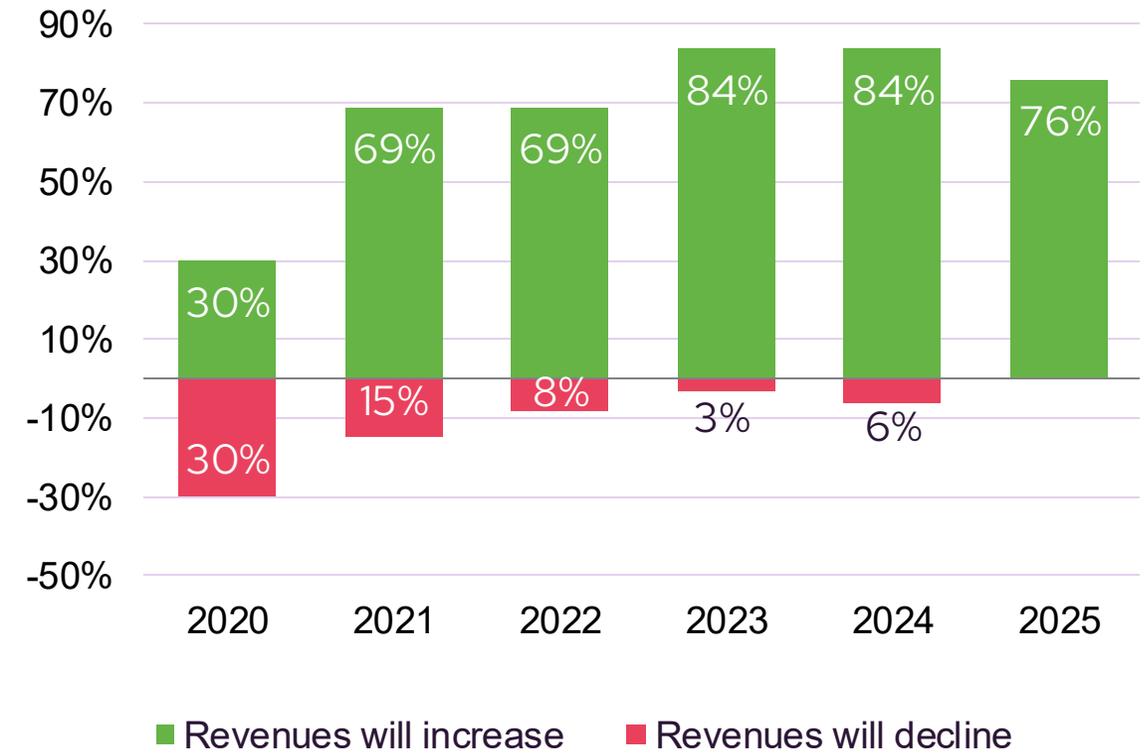
Revenue outlook for broadcast & media is improving



Supplier Revenue Outlook  
(Broadcast & Media is primary revenue source)

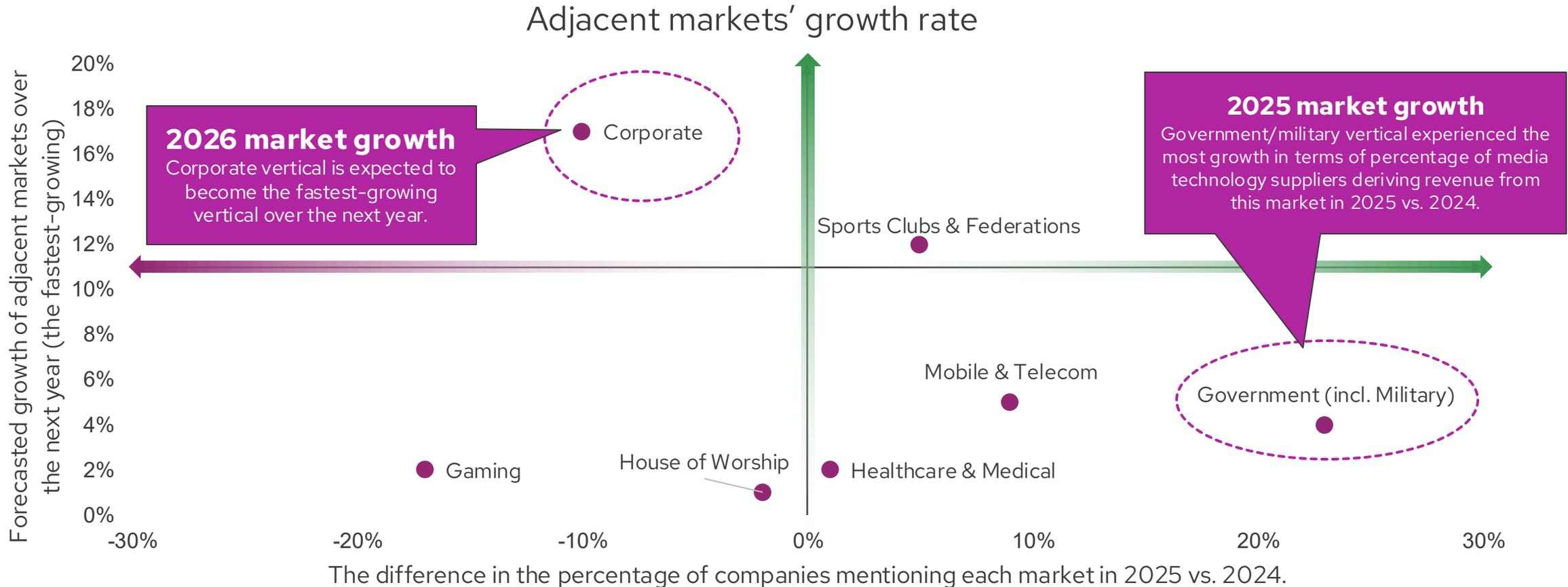


Supplier Revenue Outlook  
(Adjacent markets are primary revenue source)



# Corporate is projected to outpace other verticals

## Growth opportunities by market vertical

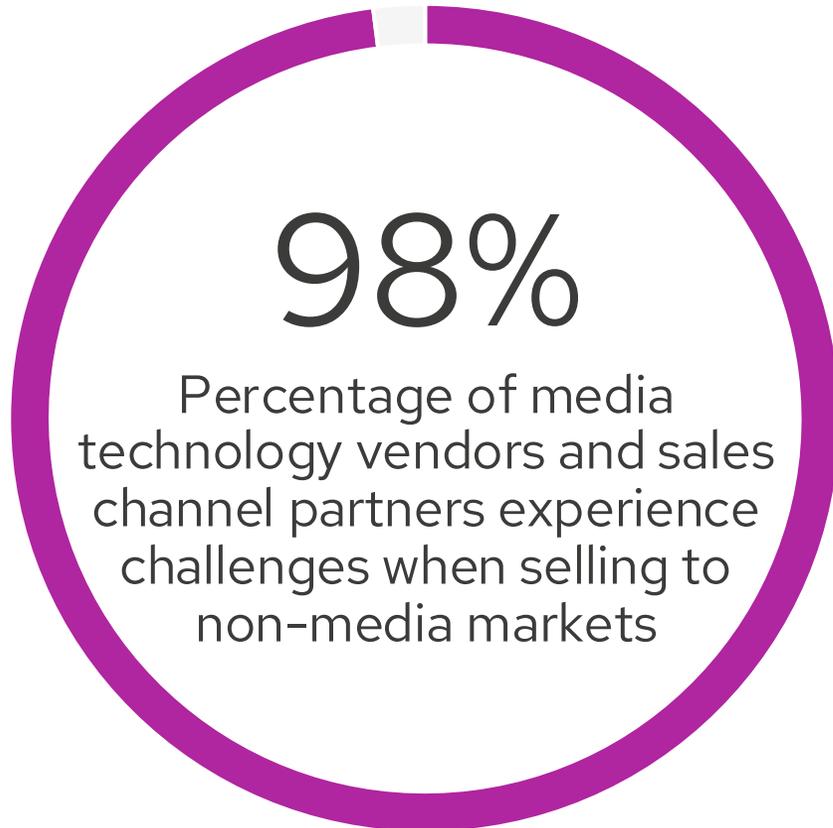


Q. What are your organization's revenue segments? Q. Please select the fastest-growing revenue segment over the next year.

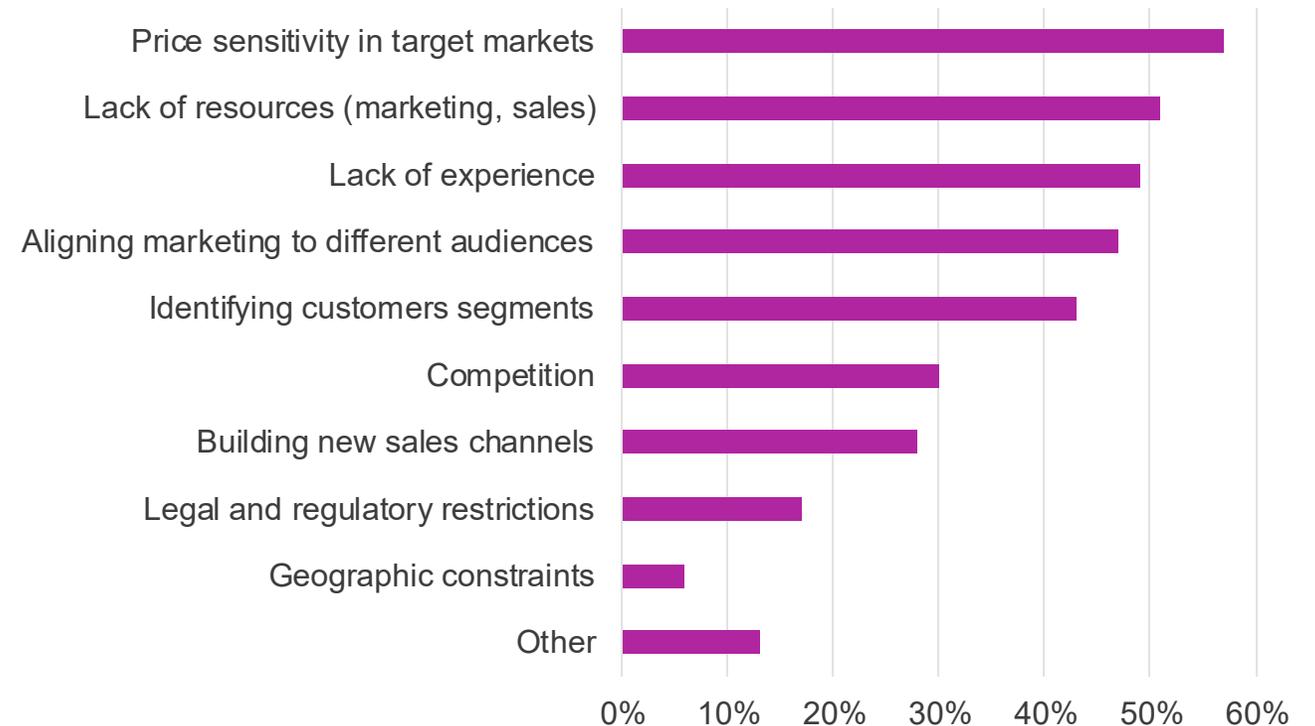
Source: IABM, MediaTech Industry Tracker Survey

# Challenges limiting sales to non-media markets

More investment in go-to-market can boost adjacent market opportunity



## Challenges selling to non-media markets



Q. What are the key challenges your organization faces when selling to non-media markets? (Base: media technology vendors and sales channel partners)

Source: IABM – Democratization of MediaTech, Broadcast AV Convergence surveys

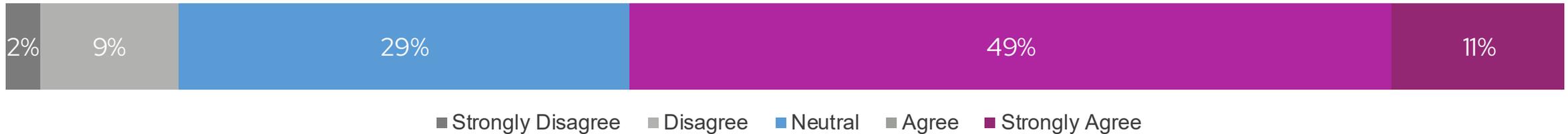
# Democratization of MediaTech

Transformation in skills and culture

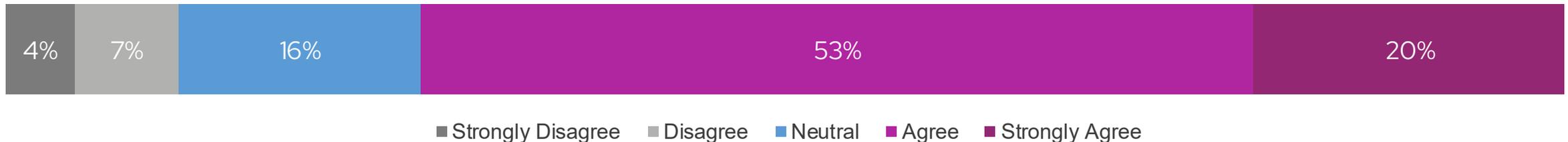


Investment in people – IABM Survey (Q4/2024)

Democratization of MediaTech will require my organization **to invest in hiring new talent** and skillsets



Democratization of MediaTech will require my organization **to invest in training and development for my existing staff**



Q. Please indicate the extent to which you agree or disagree with each of the following statements. (n=45)

# Democratization of MediaTech

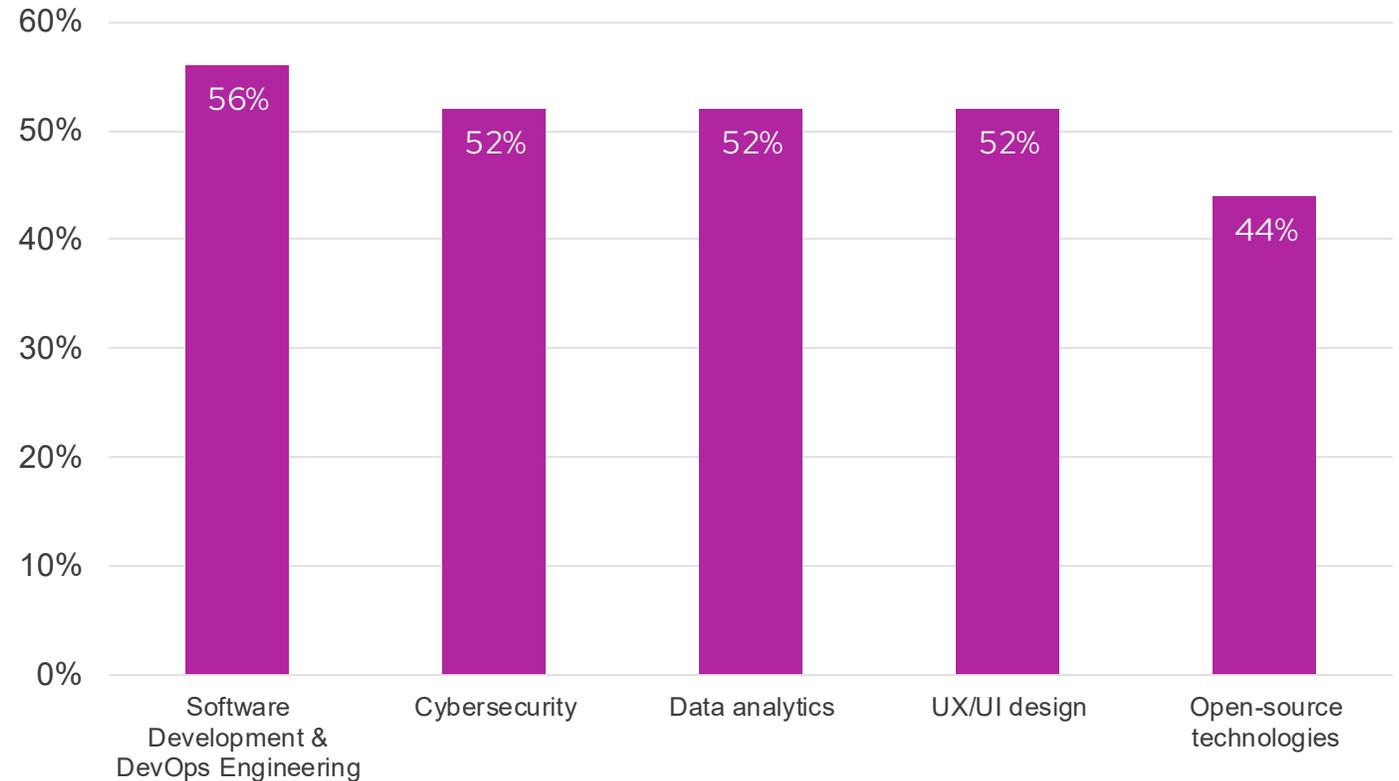
## Priority areas for skills investment



Priority areas for skills investment

2.7

The average number of new skills, which MediaTech vendors plan to invest in.



Q. What new skills are you planning to invest in? (n=24)

# Mapping video solution demand by vertical

Matching the right solution to customers in adjacent markets



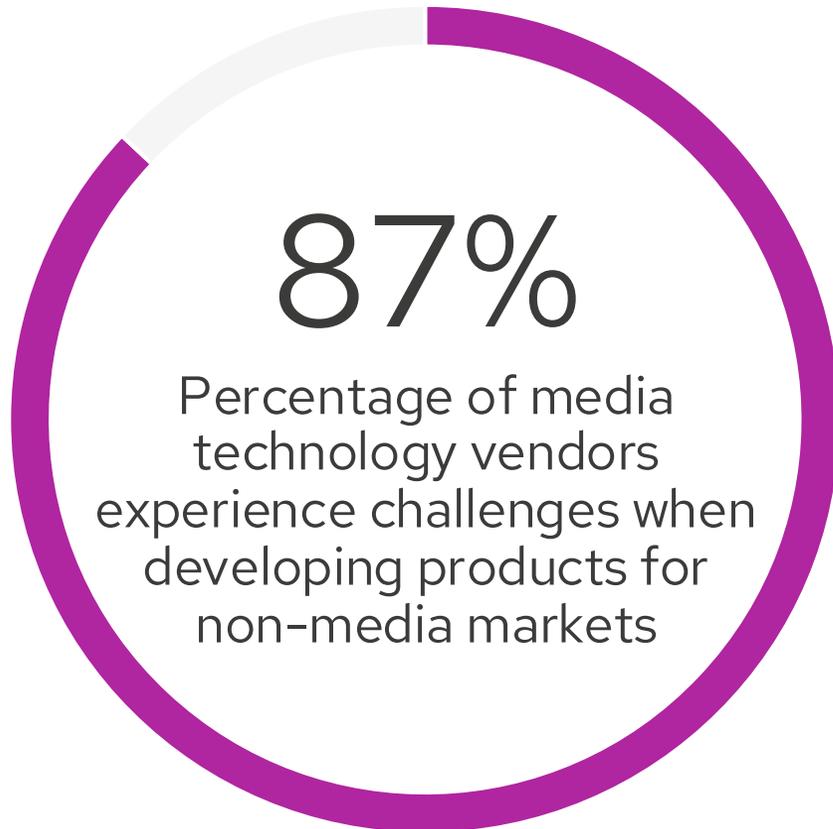
	Broadcast M&E	Corporate	Government	Sports Clubs & Federations	Venues & Stadiums	House of Worship
File-Based Video Production	✓	✓	✓	✓		✓
Multicamera Live Event Production	✓		✓	✓	✓	✓
Multicamera Live Studio Production	✓	✓		✓		
IMAG (Image Magnification)					✓	✓
Digital Signage (including Ads)					✓	✓
Multi-Campus Video Connectivity	✓	✓	✓		✓	✓
Remote Access & Operation	✓	✓	✓	✓		
Auditorium Scale Video Conferencing		✓	✓		✓	
Industrial & Analytical	✓	✓	✓	✓		

✓ Common     
 ✓ Occasional     
 ✓ Rare

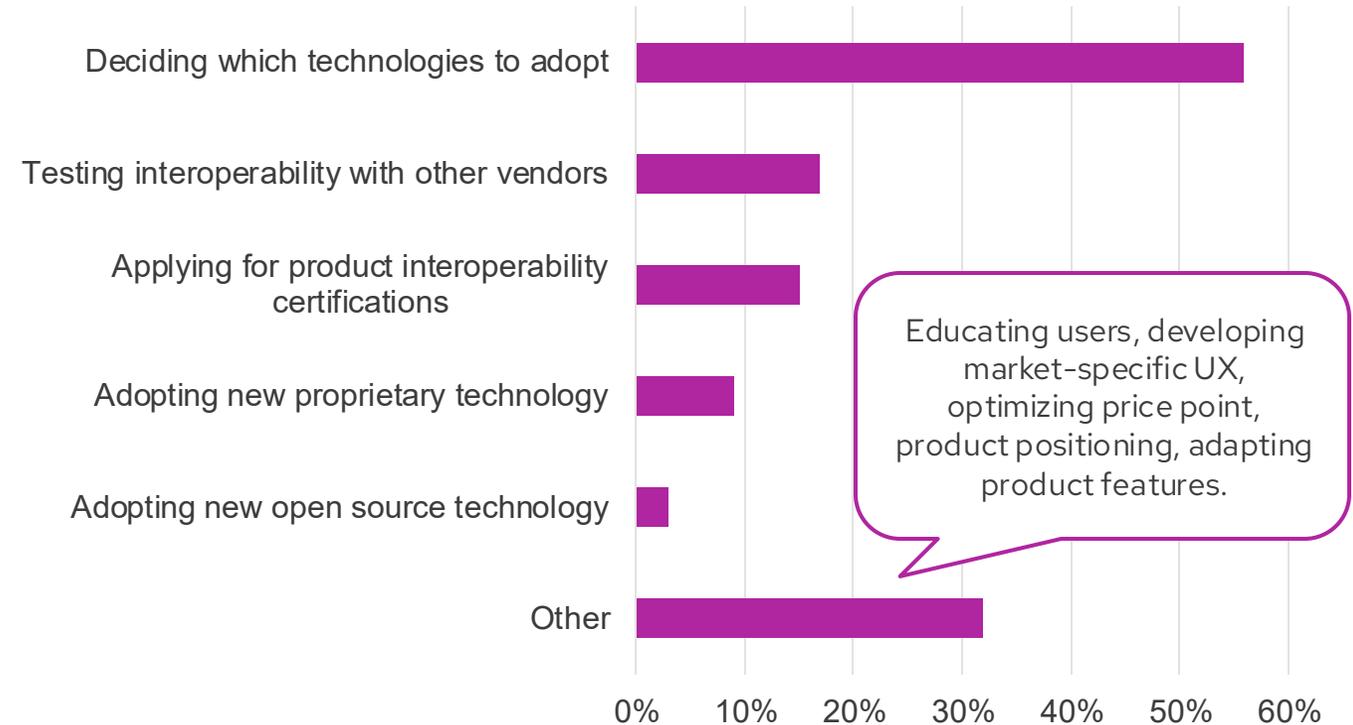
Source: IABM

# Choosing the right technologies to adopt

## Overcoming challenges in product development



### Challenges developing products for non-media markets



Q. What are the key challenges your organization faces when developing products for non-media markets? (Base: media technology vendors)

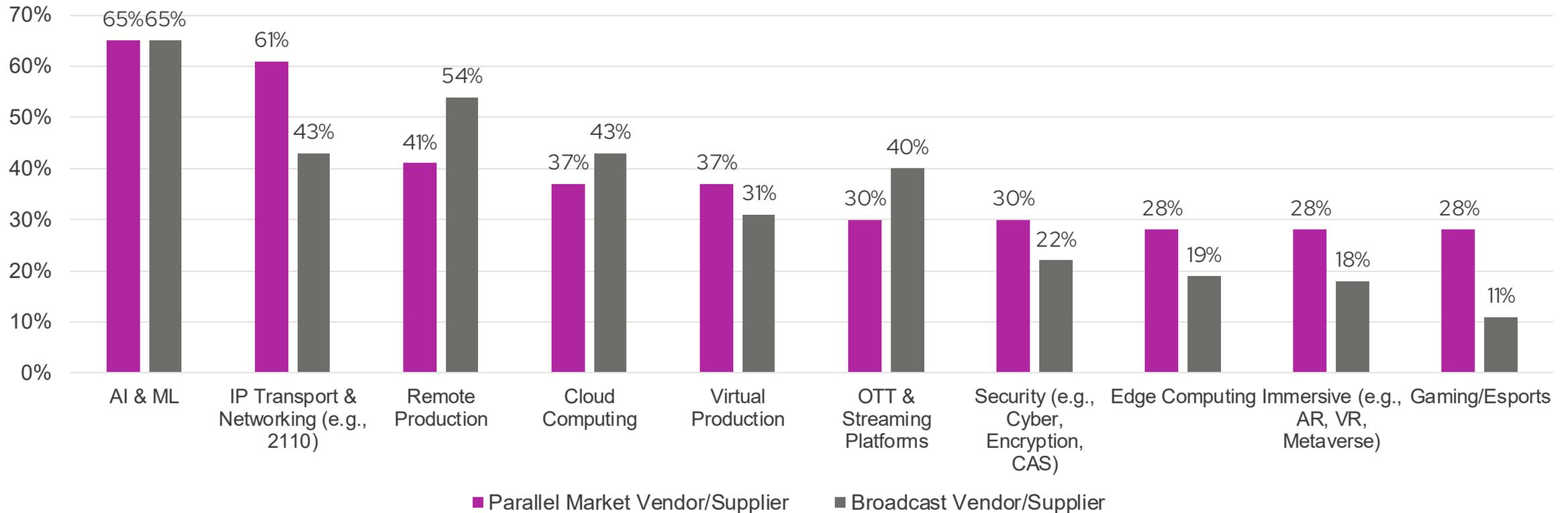
Source: IABM – Democratization of MediaTech, Broadcast AV Convergence surveys

# MediaTech Investment

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



Top 10 technological drivers of investment for parallel market vendors/suppliers



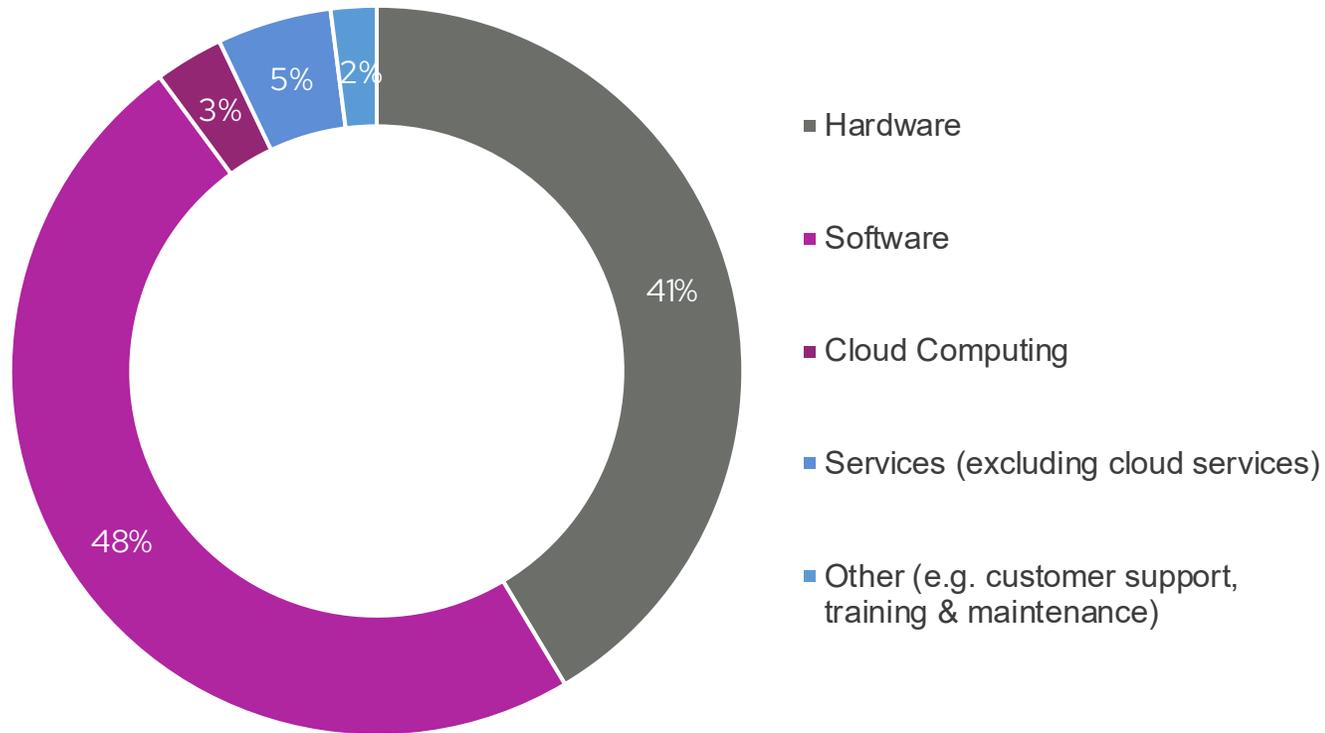
Q. What are the most important trends in your organization's technology roadmap? (MediaTech vendors, 2025, n=118)

Source: IABM MediaTech Industry Tracker

# The Shift in Technology Type

Opportunity for software-defined solutions to adapt to different customers

Supply-side primary revenue sources 2025



## Software can be adapted in an agile manner and rapidly deployed

A core product offering that has been developed in a software defined manner is advantageous for targeting adjacent markets as it can be tailored to fit different customer profiles with adaptation to user interface and capabilities. These can also be scaled and expanded dynamically through the use of licences.

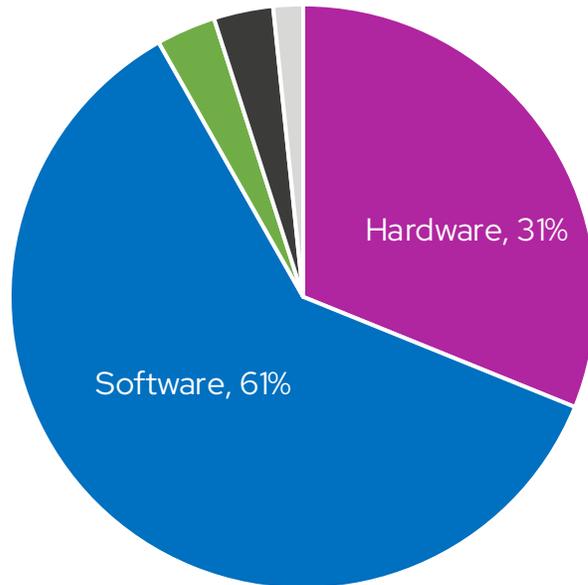
Source: IABM MediaTech Industry Tracker

# MediaTech Business Models

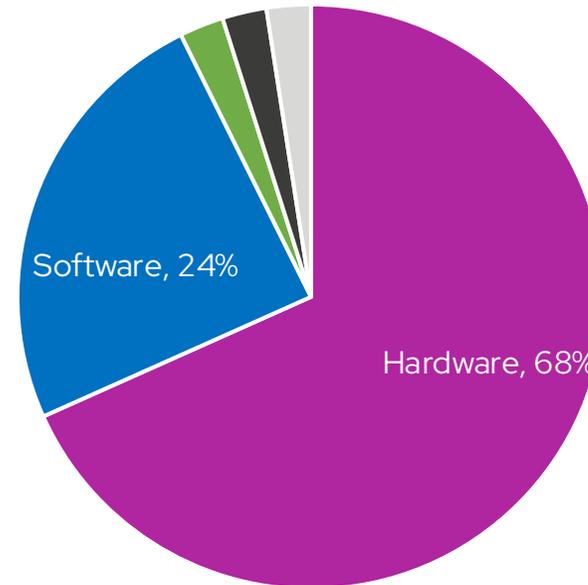
Adjacent-market suppliers rely more on hardware revenue



Supplier revenue split by type  
(Broadcast & Media is primary revenue source)



Supplier revenue split by type  
(Parallel markets are primary revenue source)



- Hardware
- Software
- Cloud Computing
- Services (excl. cloud services)
- Other (e.g., customer support, training & maintenance)

Q. What is your organization's primary source of revenue?

Source: IABM MediaTech Industry Tracker

# MediaTech Investment

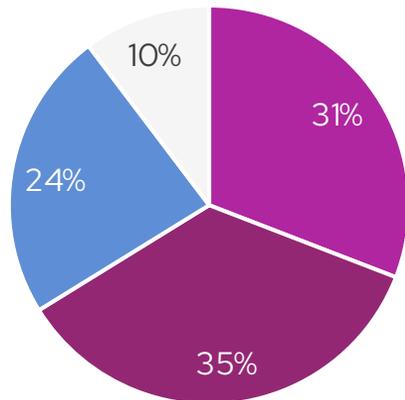


Usage-based pricing is now the dominant payment model for cloud

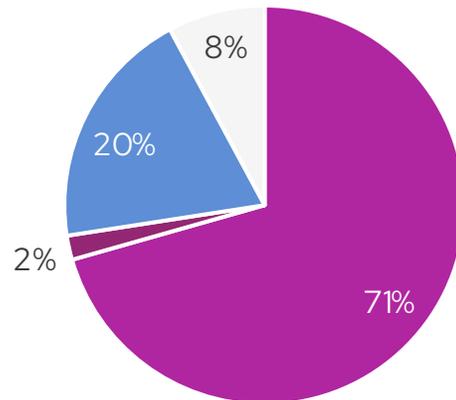
## Preferred payment models

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.

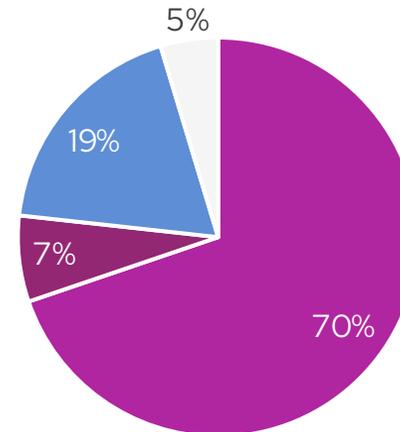
### Software



### 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

# Market Insights to Inform Your Broadcast AV Strategy **iabm**

A recap on the types of transformation taking place

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Diversified Revenue  
Sources



Investing in New  
Skills & Go To  
Market



Tailoring Technology  
UX to Application

Source: IABM

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