About IABM Media Tech Business Intelligence

IABM Media Tech Business Intelligence tracks trends in the media technology sector. The purpose of this research service is to enable IABM member companies and Global Engaged Partners to benchmark their own performance within the industry and track emerging trends on both the supply and demand sides of media technology.

The information analyzed in this report is derived from IABM Media Tech Business Tracker – a continuous survey tracking buying and supply trends of media technology.

In the survey and this report, we track the most relevant trends in the media technology business, including revenue and operating models, business sentiment and performance, technology investment and budgets as well as emerging technology adoption. This report is based on data collected in July - October 2020.

IABM Media Tech Business Intelligence reports contain data-driven dashboards on the state of the media technology industry. These are continuously reviewed and updated by IABM analysts as new insights, historical patterns and behavioural clusters are uncovered from the data.

IABM Media Tech Business Intelligence is made up of the following streams of research:

- **Media Tech Business Digest**: a short executive summary for time-pressured readers
- **The Media Tech Business Report**: the heart of this service containing all the detailed results from the research
- **Media Tech Business Analytics**: a self-service analytics portal exclusive to IABM Gold and Platinum members

If you have any feedback on the report, please do not hesitate to contact us.
The following icons represent types of organizations that make up the Media Tech Business Tracker:

**Media/Production Companies**  
(e.g. Broadcaster, Streaming Service, Production and/or Post-Production House etc.)

**Media Technology Vendors**  
(e.g. Hardware and Software Suppliers)

**Media Technology Service Provider**  
(e.g. Playout Operator, Outside Broadcast Operator, System Integrator, Cloud Service Provider etc.)

**Others**
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- On-Premise Pain Points
- Cloud Expected Improvement Areas
- Cloud Adoption Advantages
- Cloud Barriers
- IoT Application

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Sample Overview

**TYPE OF ORGANIZATION**

- Media and Production companies: 30%
- Media Tech Vendors: 36%
- Media Tech Service Providers: 17%
- Other companies: 17%

**SIZE OF ORGANIZATION**

- 1-5 employees: 23%
- 6-20 employees: 15%
- 21-50 employees: 10%
- 51-100 employees: 10%
- 101-500 employees: 16%
- 501-1000 employees: 16%
- 1001-10,000 employees: 13%
- Over 10,000 employees: 7%

Sample Size:
N=706
43% completion rate (304 completes)

**REGION**

- Europe: 56%
- MEA: 8%
- APAC: 10%
- Americas: 26%

Q. Which of the following best describes your organization?
Q. How many employees work for your organization?
Q. In which region is your company headquarters?
Q. Which of the following roles/departments best describes your responsibilities?

Q. Could you roughly estimate the portions (%) of your organization’s revenues that come from software sales, hardware products and other revenue sources such as customer support, training and maintenance?

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

Q. Which of the following best describes your organization’s main focus?
Media Technology Investment Decision-Making

**Decision-Making Power**

- **31%** I am responsible for investment in media technology
- **53%** I influence/participate in the decision-making related to investment in media technology
- **5%** I have no say in the investment in media technology
- **11%** My organization does not invest in media technology

**Decision-Making Mode**

- **46%** We do it as a team and choose technology collaboratively
- **36%** We evaluate technology as a team but one person makes the final decision
- **11%** One or two people make all the major technology purchases
- **5%** Other
- **2%** Don't know

**Most Important Decision-Maker**

- **41%** Senior Management
- **30%** Media Engineering
- **7%** IT Engineering
- **7%** Operations
- **2%** Procurement
- **1%** Finance
- **9%** Other
- **2%** Don't know

Q. Which of the following best describes your decision-making power when it comes to investing in media technology?

Q. How does your organization typically purchase media technology?

Q. What department at your organization is the most important decision-maker when it comes to buying media technology products & services?
Media Tech Business Digest
Content Supply Chain

Media Tech is a production-focused industry. Produce, Manage, and Publish have been most often chosen by respondents as segments, relevant to their businesses.
Q. What is your organization’s outlook for the overall business environment over the next year?
Q. What do you predict will happen to your organization's media technology budget over the next year?

Investment Outlook

Media and Production Companies

- Media technology budget will increase: 33% (up by 54%)
- Media technology budget will stay the same: 34%
- Media technology budget will decline: 25% (down by 27%)

Share among all companies (total sample): 30%

NET change: +11%

Media Technology Service Providers

- Media technology budget will increase: 32% (up by 26%)
- Media technology budget will stay the same: 48%
- Media technology budget will decline: 16% (down by 18%)

Share among all companies (total sample): 17%

NET change: +6%

Other Organizations

- Media technology budget will increase: 22% (up by 13%)
- Media technology budget will stay the same: 32%
- Media technology budget will decline: 30% (down by 43%)

Share among all companies (total sample): 17%

NET change: -10%
Q. What do you predict will happen to your organization's revenues over the next year?

**Revenue Outlook**

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### Media Technology Vendors
- **Share among all companies**
  - By 38% (total sample)
- **NET change**
  - By 27%
- **NET change**
  - +10%

### Media and Production Companies
- **Share among all companies**
  - By 69% (total sample)
- **NET change**
  - By 22%
- **NET change**
  - +17%

### Media Technology Service Providers
- **Share among all companies**
  - By 28% (total sample)
- **NET change**
  - By 32%
- **NET change**
  - 5%

### Other Organizations
- **Share among all companies**
  - By 28% (total sample)
- **NET change**
  - By 32%
- **NET change**
  - -9%

Response option “Don’t know/Not applicable” is hidden.
Q. What are the most important trends in your organization’s technology roadmap?

Technology Roadmap

Cloud & Virtualization: 60%
OTT & Streaming Platforms: 50%
At-Home/Remote Production: 49%
Transport & Networking (e.g., 2110 etc.): 49%
AI/ML & Analytics: 39%
Media Technology Vendors
- Cloud & Virtualization: 60%
- OTT & Streaming Platforms: 50%
- At-Home/Remote Production: 49%
- Transport & Networking (e.g., 2110 etc.): 49%
- AI/ML & Analytics: 39%

Media/Production Companies
- Cloud & Virtualization: 60%
- OTT & Streaming Platforms: 50%
- At-Home/Remote Production: 49%
- Transport & Networking (e.g., 2110 etc.): 49%
- AI/ML & Analytics: 39%

Others
- Cloud & Virtualization: 60%
- OTT & Streaming Platforms: 50%
- At-Home/Remote Production: 49%
- Transport & Networking (e.g., 2110 etc.): 49%
- AI/ML & Analytics: 39%

Media Technology Service Providers
- Cloud & Virtualization: 60%
- OTT & Streaming Platforms: 50%
- At-Home/Remote Production: 49%
- Transport & Networking (e.g., 2110 etc.): 49%
- AI/ML & Analytics: 39%

Others
- Cloud & Virtualization: 60%
- OTT & Streaming Platforms: 50%
- At-Home/Remote Production: 49%
- Transport & Networking (e.g., 2110 etc.): 49%
- AI/ML & Analytics: 39%

Mobile (e.g., 5G etc.): 36%
Immersive (i.e., video and audio): 30%
Social Media: 27%
Media Technology Service Providers
- Mobile (e.g., 5G etc.): 36%
- Immersive (i.e., video and audio): 30%
- Social Media: 27%

Others
- Mobile (e.g., 5G etc.): 36%
- Immersive (i.e., video and audio): 30%
- Social Media: 27%

Next-Gen Standards (ATSC 3.0 etc.): 24%
Security (e.g., Cyber, Encryption, etc.): 23%
Targeted/Programmatic Advertising: 22%
Others
- Next-Gen Standards (ATSC 3.0 etc.): 24%
- Security (e.g., Cyber, Encryption, etc.): 23%
- Targeted/Programmatic Advertising: 22%

Blockchain: 5%
Edge Computing: 6%
Other: 6%

Others
- Blockchain: 5%
- Edge Computing: 6%
- Other: 6%

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### Content Chain Trends

#### Investment Outlook by Buyers

<table>
<thead>
<tr>
<th>Segment</th>
<th>Growing</th>
<th>Stable</th>
<th>Declining</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consume</td>
<td>61%</td>
<td>33%</td>
<td>7%</td>
</tr>
<tr>
<td>Monetize</td>
<td>51%</td>
<td>42%</td>
<td>7%</td>
</tr>
<tr>
<td>Connect</td>
<td>51%</td>
<td>39%</td>
<td>10%</td>
</tr>
<tr>
<td>Publish</td>
<td>46%</td>
<td>43%</td>
<td>11%</td>
</tr>
<tr>
<td>Manage</td>
<td>46%</td>
<td>46%</td>
<td>8%</td>
</tr>
<tr>
<td>Store</td>
<td>46%</td>
<td>41%</td>
<td>13%</td>
</tr>
<tr>
<td>Create</td>
<td>45%</td>
<td>44%</td>
<td>11%</td>
</tr>
<tr>
<td>Support</td>
<td>39%</td>
<td>46%</td>
<td>15%</td>
</tr>
<tr>
<td>Produce</td>
<td>40%</td>
<td>46%</td>
<td>14%</td>
</tr>
</tbody>
</table>

Q. How is technology investment in the content supply chain segments that are relevant to your organization changing?
### Sector Trends

#### Most Important Investment Drivers

<table>
<thead>
<tr>
<th>Cloud &amp; Virtualization</th>
<th>AI/ML &amp; Analytics</th>
<th>Imaging (e.g. HDR, 8K, HFR etc.)</th>
<th>Immersive (i.e. video and audio)</th>
<th>OTT &amp; Streaming Platforms</th>
<th>Blockchain</th>
<th>Security (e.g. Cyber, Encryption etc.)</th>
<th>At-Home/Remote Production</th>
<th>IP Transport &amp; Networking (e.g. 2110 etc.)</th>
<th>Mobile (e.g. 5G etc.)</th>
<th>Next-Gen Standards (ATSC 3.0 etc.)</th>
<th>IoT</th>
<th>Edge Computing</th>
<th>Social Media</th>
<th>Gaming/eSports</th>
<th>Targeted/Programmatic Advertising</th>
<th>Other</th>
</tr>
</thead>
</table>

**Q. Please select the most important technological drivers of investment in each of the sectors that are relevant to your organization.**
Insourcing Trends

38% of Media/Production companies expect investment in internal software development to grow.

Q. Which parts of the Content Supply Chain are relevant to your business?
Cloud is the most widely adopted technology, with almost no companies rejecting the adoption of cloud technology.

HDR has the highest level of potential adoption, which means higher investment in this technology.

Blockchain and IoT are least likely to be adopted and still remain rather a great promise, than reality.

VR and AR have very similar profiles in terms of technology adoption.

We have already adopted/transitioned to this technology
Likely to adopt/transition
Unlikely to adopt/transition
The Media Tech Business Report
Content Sectors
Q. Which of the following sectors are relevant to your business and responsibilities?

- Digital/Internet/Social: 54%
- Live Sports: 53%
- Live Studio Production: 52%
- Live News: 49%
- Scripted/Non-Live: 41%
- Audio: 37%
- Virtual/Immersive: 21%
Business Environment Outlook
Media Technology Suppliers and Service Providers have a more optimistic Business Environment Outlook compared to Media/Production companies, and even more than other companies.
OTT and Streaming Services have the most optimistic business outlook among media companies.

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

Share of the segment among Media Technology Vendors
Media companies that rely on the subscription-based revenue model have the most optimistic business outlook.

**Media/Production Companies’ Business Environment Outlook**

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

**Advertising**
- 45% Very positive
- 30% Quite positive
- 16% Neutral
- 3% Quite negative
- 10% Very negative

**Subscriptions**
- 13% Very positive

**Government Funding**
- 30% Very positive
- 16% Quite positive
- 10% Neutral
- 3% Quite negative
- 10% Very negative

**Other**
- 12% Very positive
- 6% Quite positive
- 12% Neutral
- 12% Quite negative
- 24% Very negative
Media Technology Vendors that rely on **on-demand software revenues** have the most positive business outlook, followed by subscription-based software revenues.

**Media Technology Vendors’ Business Environment Outlook**

Q. What is your organization’s outlook for the overall business environment over the next year?
Revenue Outlook
Revenue Outlook - Media Companies

Media Companies have a positive revenue outlook for the next year, driven by the third that predicts high revenue increase.
Q. What do you predict will happen to your organization's revenues over the next year?

Q. By how much will your organization's revenues increase/decrease over the next year?

Revenue Outlook by Types of Media Company

- **OTT/Streaming Service Provider**
  - Revenue will increase: 56%
  - Revenue will stay the same: 11%
  - Revenue will decline: 11%

- **Post-Production Company**
  - Revenue will increase: 50%
  - Revenue will stay the same: 25%
  - Revenue will decline: 25%

- **Media Production Company**
  - Revenue will increase: 43%
  - Revenue will stay the same: 10%
  - Revenue will decline: 30%

- **Radio Broadcaster**
  - Revenue will increase: 33%
  - Revenue will stay the same: 33%
  - Revenue will decline: 33%

- **Pay-TV Operator (Cable, IPTV, Satellite)**
  - Revenue will increase: 29%
  - Revenue will stay the same: 29%
  - Revenue will decline: 43%

- **Television Broadcaster**
  - Revenue will increase: 18%
  - Revenue will stay the same: 22%
  - Revenue will decline: 44%
Revenue Outlook - Media Technology Vendors

Media Technology Vendors quite a positive revenue outlook. Almost half of the media/production companies predict revenue increase over the year - by 38% on average, driving positive predicted NET revenue change among media companies of +11%.
More than 2 in 5 Media Tech Service Providers expect their revenue over the next year to grow - by 28% on average. 1 in 4 expects its revenue to decline - by 32% on average - which results in the expected NET revenue decline.
Revenue Outlook - Other Organizations

Other organizations have quite a negative revenue outlook for the next year.

- **37%** will stay the same
- **39%** will decline by 32% on average
- **12%** will increase by 28% on average

NET change: **-9%**

Share among all companies (total sample): **17%**
Media Technology Investment Outlook
In terms of investment in media technology over the next year, Media Companies expect a significant growth of +11% - based on one-third of media companies that expect investment to grow by 54% on average, and a quarter of the media companies that forecast a decline in media technology investment over the next year - by -27% on average.
Half of the Media Technology Service Providers expect the media technology budget to stay the same over the next year. The overall NET expected change is still positive: +6%.
Other types of organizations are quite unsure about media technology investment over the next year. A third of these companies expect media technology investment to decline over the next year, by a significant 43% on average. This results in a negative overall investment outlook of -10%.
Investment Outlook by Vendors' Type of Revenue

Investment outlook in **Cloud computing** is the most optimistic compared to other categories of products/services over the next year, while **Hardware** has the most pessimistic forecast.

Among Software categories, **Subscriptions** and **On-Demand software** have a better investment outlook forecast than **Permanent Licences**.
Technology Roadmap
Q. What are the most important trends in your organization’s technology roadmap?

Rankings for other technologies are not shown due to the low importance of those technologies in the Technology Roadmap (small bases).
Q. What are the most important trends in your organization’s technology roadmap?

1. **Technology Roadmap by Company Type**

   - **Cloud & Virtualization**
   - **OTT & Streaming Platforms**
   - **IP Transport & Networking (e.g., 2110 etc.)**
   - **At-Home/Remote Production**
   - **AI/ML & Analytics**
   - **Imaging (e.g., HDR, 8K, HFR etc.)**
   - **Security (e.g., Cyber, Encryption, etc.)**
   - **Mobile (e.g., 5G etc.)**

2. **Immersive (i.e., video and audio)**
   - **Gaming/eSports**
   - **Social Media**
   - **Targeted/Programmatic Advertising**
   - **IoT**
   - **Edge Computing**
   - **Next-Gen Standards (ATSC 3.0 etc.)**
   - **Blockchain**

3. **Media Technology Vendor**
   - 65%
   - 41%
   - 24%
   - 11%
   - 12%
   - 19%

4. **Media Technology Service Provider**
   - 90%
   - 63%
   - 35%
   - 13%
   - 10%
   - 8%

5. **Media/Production Company**
   - 55%
   - 52%
   - 39%
   - 16%
   - 8%
   - 1%
Q. How is technology investment in the content supply chain segments that are relevant to your organization changing?
Q. Please select the most important technological drivers of investment in each of the content supply chain segments that are relevant to your organization.

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Q. Please select the fastest-growing areas of investment in Creating & Producing Content (3 max) from your perspective.
Q. Please select the fastest-growing areas of investment in Managing Content (3 max) from your perspective.
Q. Please select the fastest-growing areas of investment in Publishing Content (3 max) from your perspective.

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Q. Please select the fastest-growing areas of investment in Publishing Content (3 max) from your perspective.
Q. Please select the fastest-growing areas of investment in Publishing Content (3 max) from your perspective.

**Fastest growing areas of investment**

- Internet/IP Connectivity: 66%
- IP Routing & Networking: 47%
- Inter-Facility Connectivity (e.g., contribution, transcoders): 23%
- File & Object Delivery: 21%
- Hybrid SDI-IP Routing & Networking: 20%
- Mobile/Cellular Connectivity: 20%
- Access Connectivity (e.g., bonded cellular, microwave links): 13%
- Interfacing & Conversion (e.g., signal processing): 10%
- Satellite Connectivity: 6%
- SDI Routing & Networking: 3%

**Media/Production Companies**

- Internet/IP Connectivity
- IP Routing & Networking
- Mobile/Cellular Connectivity
- Hybrid SDI-IP Routing & Networking
- Inter-Facility Connectivity (e.g., contribution, transcoders)
- File & Object Delivery
- Access Connectivity (e.g., bonded cellular, microwave links)
- Interfacing & Conversion (e.g., signal processing)
- Satellite Connectivity
- SDI Routing & Networking

**Media Technology Vendors**

- SDI Routing & Networking
- Inter-Facility Connectivity (e.g., contribution, transcoders)
- Hybrid SDI-IP Routing & Networking
- File & Object Delivery
- Access Connectivity (e.g., bonded cellular, microwave links)
- Interfacing & Conversion (e.g., signal processing)
- Satellite Connectivity
- SDI Routing & Networking

**Media Technology Service Providers**

- SDI Routing & Networking
- Inter-Facility Connectivity (e.g., contribution, transcoders)
- Hybrid SDI-IP Routing & Networking
- File & Object Delivery
- Access Connectivity (e.g., bonded cellular, microwave links)
- Interfacing & Conversion (e.g., signal processing)
- Satellite Connectivity
- SDI Routing & Networking

**Others**

- SDI Routing & Networking
- Inter-Facility Connectivity (e.g., contribution, transcoders)
- Hybrid SDI-IP Routing & Networking
- File & Object Delivery
- Access Connectivity (e.g., bonded cellular, microwave links)
- Interfacing & Conversion (e.g., signal processing)
- Satellite Connectivity
- SDI Routing & Networking
Q. Please select the fastest-growing areas of investment in Publishing Content (3 max) from your perspective.
Q. Please select the fastest-growing areas of investment in Publishing Content (3 max) from your perspective.
Sector Trends
Q. Please select the most important technological drivers of investment in each of the sectors that are relevant to your organization.
Media Technology
Buying Preferences
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?
R&D Investment
9 in 10 Media Technology Vendors predict their organization's investment in the next year will not decrease, with roughly equal numbers of those who predict R&D spending to increase and to be stable.

R&D spending outlook

R&D budget as a percentage of Media Tech Vendors' annual sales

Q. What percentage of your organization's total annual sales is spent on Research & Development (R&D)? What do you predict will happen to your organization's R&D spending over the next year?
Parallel Markets
Parallel Markets

Supplier Revenue Segments

- Broadcast: 89%
- Corporate: 47%
- Sports: 47%
- Government/Military: 35%
- Education/Training: 30%
- Worship: 28%
- Marketing/Media: 24%
- eSports: 22%
- Mobile/Telecom: 22%
- Signage: 10%
- Medical: 10%
- Gaming: 8%
- Security Monitoring: 6%
- Other: 12%

Ranking

- Broadcast: 60% (1), 12% (2), 9% (3)
- Corporate: 20% (1), 40% (2), 40% (3)
- Sports: 9% (1), 77% (2), 14% (3)
- Government/Military: 22% (1), 39% (2), 39% (3)
- Education/Training: 13% (1), 40% (2), 47% (3)
- Worship: 13% (1), 33% (2), 53% (3)
- Marketing/Media: 6% (1), 59% (2), 35% (3)
- Mobile/Telecom: 32% (1), 36% (2), 32% (3)
- Medical: 67% (1), 33% (2), 33% (3)

55% of Media Tech Vendors' revenues are derived from sales to broadcast and media customer types.
Q. Please provide an outlook for revenue growth in the following markets over the next year.

<table>
<thead>
<tr>
<th>Market</th>
<th>Revenues will increase</th>
<th>Revenues will stay the same</th>
<th>Revenues will decrease</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketing/Media</td>
<td>75%</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>Mobile/Telecom</td>
<td>73%</td>
<td>27%</td>
<td>21%</td>
</tr>
<tr>
<td>Signage</td>
<td>62%</td>
<td>25%</td>
<td>12%</td>
</tr>
<tr>
<td>Sports</td>
<td>60%</td>
<td>36%</td>
<td>4%</td>
</tr>
<tr>
<td>Worship</td>
<td>60%</td>
<td>40%</td>
<td>4%</td>
</tr>
<tr>
<td>Corporate</td>
<td>55%</td>
<td>25%</td>
<td>20%</td>
</tr>
<tr>
<td>Government/Military</td>
<td>51%</td>
<td>28%</td>
<td>21%</td>
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<tr>
<td>Education/Training</td>
<td>51%</td>
<td>31%</td>
<td>18%</td>
</tr>
<tr>
<td>Broadcast</td>
<td>40%</td>
<td>51%</td>
<td>9%</td>
</tr>
<tr>
<td>eSports</td>
<td>38%</td>
<td>41%</td>
<td>22%</td>
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<td>Medical</td>
<td>38%</td>
<td>42%</td>
<td>21%</td>
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<tr>
<td>Gaming</td>
<td>31%</td>
<td>31%</td>
<td>38%</td>
</tr>
<tr>
<td>Security Monitoring</td>
<td>30%</td>
<td>50%</td>
<td>20%</td>
</tr>
</tbody>
</table>
Internal Technology Development
Q. What is the percentage of products/solutions your organization builds by itself using internal system integration resources or software development tools versus the percentage of products/solutions bought from third-party product/service suppliers?
Insourcing Drivers

Q. Why are you investing more in in-house technology development capabilities?

38% of Media/Production companies expect investment in internal software development to grow.

- Enabling customization of technology solutions: 58%
- Enabling technology integration: 52%
- Control over technology development and roadmaps: 45%
- Solutions offered by vendors do not meet our needs: 45%
- Increasing speed of deployment compared to vendor: 26%
- Leveraging open-source solutions: 26%
- Enabling as-a-service business models: 23%
38% of Media/Production companies expect investment in internal software development to grow.

Q. Which parts of the Content Supply Chain are relevant to your business?

Q. Please select in which of the following supply chain blocks your organization has deployed/plans to deploy more in-house builds.

CREATE: 30%
PRODUCE: 46%
MANAGE: 36%
PUBLISH: 36%
MONETIZE: 15%
CONSUME: 24%
CONNECT: 15%
SUPPORT: 17%
STORE: 14%
Media Technology Adoption
Q. How likely is your organization to adopt/transition to the following technologies in the next few years?

We have already adopted/transitioned to this technology
Likely to adopt/transition
Unlikely to adopt/transition

- **Cloud**: 42% already adopted/transitioned, 6% likely to adopt/transition, 9% unlikely to adopt/transition
- **UHD**: 43% already adopted/transitioned, 18% likely to adopt/transition, 7% unlikely to adopt/transition
- **HDR**: 51% already adopted/transitioned, 12% likely to adopt/transition, 10% unlikely to adopt/transition
- **Upgrade to IP**: 48% already adopted/transitioned, 10% likely to adopt/transition, 16% unlikely to adopt/transition
- **VR**: 36% already adopted/transitioned, 24% likely to adopt/transition, 24% unlikely to adopt/transition
- **AI/ML**: 42% already adopted/transitioned, 24% likely to adopt/transition, 17% unlikely to adopt/transition
- **AR**: 37% already adopted/transitioned, 25% likely to adopt/transition, 23% unlikely to adopt/transition
- **IoT**: 27% already adopted/transitioned, 32% likely to adopt/transition, 31% unlikely to adopt/transition
- **Blockchain**: 22% already adopted/transitioned, 30% likely to adopt/transition, 45% unlikely to adopt/transition
Q. In which of the following content supply chain segments are you most likely to deploy AI/ML? Q. How have you deployed/plan to deploy AI/ML?

AI/ML Application

of Media/Production companies have already adopted AI/ML
Q. How have you deployed/plan to deploy AI/ML?

AI/ML Deployment Options

- Leverage cloud service provider’s AI/ML capabilities: 43%
- Leverage specific AI/ML functionalities in vendor’s solution: 37%
- Specialist AI/ML platform: 31%
- Internal deployment/recruitment: 20%

Media/Production Companies

Others
Q. What are the main challenges in deploying AI/ML? (MAX 3)

- Cost of deployment: 42%
- Lack of talent/skills: 37%
- ROI uncertainty: 32%
- Data management and integration: 31%
- Lack of data availability: 28%
- Lack of strategy on AI/ML: 25%
- Cost of data training: 17%
- Data infrastructure bottlenecks: 11%
- Other: 3%

Opportunities:
- Workflow Automation: 25%
- Viewer Behavior Analytics: 19%
- Efficiency: 19%
- Facial Recognition: 12%
- Automatic Metadata Extraction: 12%
- Recommendation Engines: 12%
- Monitoring End User Experience: 6%
Q. In which of the following content supply chain segments are you most likely to deploy blockchain?

- 30% of Media/Production companies have already adopted Blockchain.
Q. In which of the following content supply chain segments are you most likely to deploy cloud-based technology?

Cloud Application

43% of Media/Production companies have already transitioned to cloud
Q. What is the preferred deployment strategy for the adoption of cloud-based technology in your organization?
Q. Which of the following major public cloud service providers does your organization use?

Cloud Service Providers Usage

- Amazon Web Services (AWS) 68%
- Microsoft Azure 43%
- Google Cloud 34%
- IBM Cloud 11%
- Oracle Cloud 9%
- SAP 6%
- Salesforce 6%
- Rackspace 4%
- Alibaba Cloud 4%
- VMWare Cloud 2%
- Other 11%

Media/Production Companies

Others

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Q. What are the pain points which contribute to lower satisfaction with on-premise solutions? Please select your top three options.

- Costly Infrastructure: 61%
- Outdated platform: 39%
- Slower upgrade cycle: 29%
- Inefficient resource utilization: 22%
- Siloed architecture and systems: 16%
- Unable to support newer business models (live streaming, D2C OTT etc.): 14%
- Security concerns: 12%
- None of the above: 12%
- Not meeting business objectives: 10%
- Poor local, and regional maintenance (support) services: 6%
- Rise in revenue leakages: 4%
- Fragmented financial data: 2%
- Fragmented analytics hampering predictive business decision making on timely basis: 0%
- Other: 4%
Q. What are the key improvement areas you expect from the cloud? Please select your top three options.
Cloud Adoption Advantages

- Lower total cost of ownership: 40%
- Greater geographical collaboration: 32%
- Faster new market/geographical expansion: 26%
- Robust compliance, and security: 23%
- Flexible, homogeneous, user-friendly employee user experience (UX): 23%
- Launching new business models: 21%
- Lower life-time upgrade costs: 19%
- Seamless integration with content supply chain modules (front end): 19%
- Higher asset utilization rates: 15%
- Unified information repository (customer billing, sales, rights usage etc.): 9%
- Faster customer adoption: 9%
- Higher average revenue per user (ARPU): 4%
- Other: 9%

Q. What were the advantages that your company has enjoyed by deploying the cloud vs. on premise?
Q. What are the most significant barriers/challenges to moving to the cloud?

- Rising content storage costs: 43%
- Security and privacy concerns: 35%
- Lack of long-term vision and context: 31%
- Moving/integrating between cloud vendors: 25%
- Lack of industry specific knowledge within implementation teams: 24%
- Transformation framework incomplete and continuously changing: 22%
- Conservative procurement approach: 18%
- Lack of resources: 16%
- Digital consumer acquisition costs: 16%
- Poor global capabilities of cloud vendors: 12%
- Other: 4%
Q. In which of the following content supply chain segments are you most likely to deploy Internet of Things (IoT) technology?

- Create: 30%
- Produce: 25%
- Manage: 22%
- Publish: 22%
- Monetize: 12%
- Consume: 10%
- Connect: 12%
- Support: 5%
- Store: 5%

Of Media/Production companies have already adopted IoT.
Appendix
About IABM

IABM is the international trade association for broadcast and media technology suppliers. IABM facilitates the important networking and interaction between suppliers that shape and define the unique ecosystem of the broadcast and media technology industry.

IABM supports member companies with a comprehensive range of services across market intelligence, training, events, technology, exhibitions, business standards and best practices. We hold the interests of member companies as paramount, and strive to provide strong guidance and support at every level in all geographies.

We understand that in today's rapidly changing media landscape, our members have never had a greater need for timely, relevant and effective advice and support. IABM's mission is to be an ever more powerful beacon illuminating the way forward, highly responsive to all our members’ needs and helping them to successfully navigate change and prosper.

Further information about IABM and its activities can be found at www.theiabm.org.