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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## Appendix
Sample Overview
Sample Overview

**TYPE OF ORGANIZATION**

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

**SIZE OF ORGANIZATION**

<table>
<thead>
<tr>
<th>Number of Employees</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-5</td>
<td>23%</td>
</tr>
<tr>
<td>6-20</td>
<td>15%</td>
</tr>
<tr>
<td>21-50</td>
<td>10%</td>
</tr>
<tr>
<td>51-100</td>
<td>10%</td>
</tr>
<tr>
<td>101-500</td>
<td>16%</td>
</tr>
<tr>
<td>501-1000</td>
<td>5%</td>
</tr>
<tr>
<td>1001-10,000</td>
<td>7%</td>
</tr>
<tr>
<td>Over 10,000</td>
<td>7%</td>
</tr>
</tbody>
</table>

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?

- **C-level**
  - CEO / President / Owner: 33%
  - Sales: 10%
  - Business Development: 8%
  - Operations: 6%
  - CTO: 6%
  - Marketing: 6%
  - Product Management: 4%
  - CMO: 4%
  - Content / Programming / Creative: 3%
  - Production: 3%
  - COO: 3%
  - Software Engineering: 3%
  - Hardware Engineering: 2%
  - Data Analytics / Science: 0%
  - Finance: 0%
  - CFO: 0%
  - Other: 8%

- **Others**

**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?**

- **Media Technology Vendors**
  - Hardware: 45%
  - Software (Permanent Licence): 24%
  - Software (Subscriptions): 18%
  - Software (On-Demand): 6%
  - Other: 7%

- **Media Companies**
  - Advertising: 45%
  - Government Funding: 30%
  - Subscriptions: 13%
  - Other: 12%

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

- **Media Companies**
  - 45%
  - **Service Providers**
  - 47%

- **Company Main Focus**
  - Media Companies: 39%
  - Service Providers: 23%
  - Other Companies: 38%
Q. Which of the following best describes your decision-making power when it comes to investing in media technology?  

- 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  

Q. How does your organization typically purchase media technology?  

- 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  

Q. What department at your organization is the most important decision-maker when it comes to buying media technology products & services?  

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

**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%)

**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%)

**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%)

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

- **Media and Production Companies**
  - Revenue will increase: +17% NET change
  - Revenue will stay the same: 32%
  - Revenue will decline: 20%

- **Media Technology Vendors**
  - Revenue will increase: +10% NET change
  - Revenue will stay the same: 23%
  - Revenue will decline: 28%

- **Media Technology Service Providers**
  - Revenue will increase: 5% NET change
  - Revenue will stay the same: 24%
  - Revenue will decline: 33%

- **Other Organizations**
  - Revenue will increase: -9% NET change
  - Revenue will stay the same: 37%
  - Revenue will decline: 12%
Q. What are the most important trends in your organization’s technology roadmap?
### 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>
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<tr>
<td>Publish</td>
<td>46%</td>
<td>43%</td>
<td>11%</td>
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<tr>
<td>Manage</td>
<td>46%</td>
<td>46%</td>
<td>8%</td>
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<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>Category</th>
<th>Live News</th>
<th>Live Sports</th>
<th>Live Studio Production</th>
<th>Audio</th>
<th>Scripted</th>
<th>Virtual/Immersive</th>
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</thead>
<tbody>
<tr>
<td>Cloud &amp; Virtualization</td>
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<td>AI/ML &amp; Analytics</td>
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<tr>
<td>Imaging (e.g., HDR, 8K, HFR etc.)</td>
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<td>Immersive (i.e., video and audio)</td>
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<tr>
<td>OTT &amp; Streaming Platforms</td>
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<tr>
<td>Blockchain</td>
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<td>Security (e.g., Cyber, Encryption etc.)</td>
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<tr>
<td>At-Home/Remote Production</td>
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<td>IP Transport &amp; Networking (e.g., 2110 etc)</td>
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<td>Mobile (e.g., 5G etc)</td>
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<td>Next-Gen Standards (ATSC 3.0 etc)</td>
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<tr>
<td>IoT</td>
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<tr>
<td>Edge Computing</td>
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<td>Social Media</td>
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<tr>
<td>Gaming/eSports</td>
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<tr>
<td>Targeted/Programmatic Advertising</td>
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<tr>
<td>Other</td>
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Insourcing Trends

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%

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.
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.