



MediaTech Business Digest

Part of MediaTech Business Intelligence

About IABM MediaTech Business Intelligence

IABM MediaTech 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 2020 - August 2022.

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.

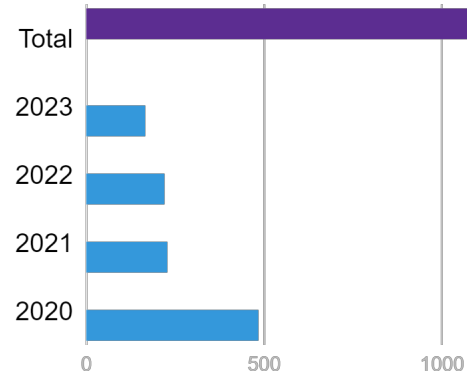
IABM Media Tech Business Intelligence is made up of the following streams of research:

- **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

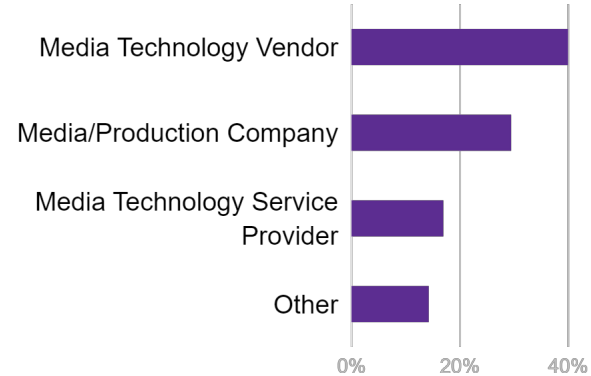
If you have any feedback on the report, please do not hesitate to [contact us](#).

Sample Description

Number of respondents

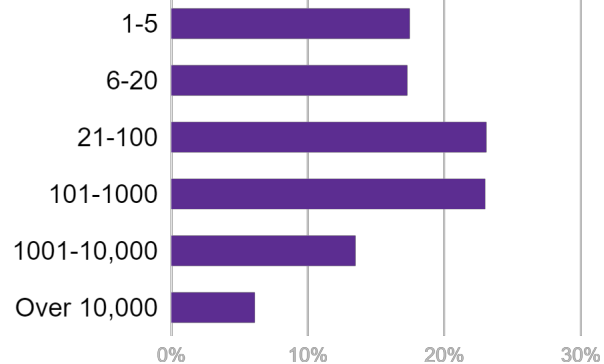


Type of organization

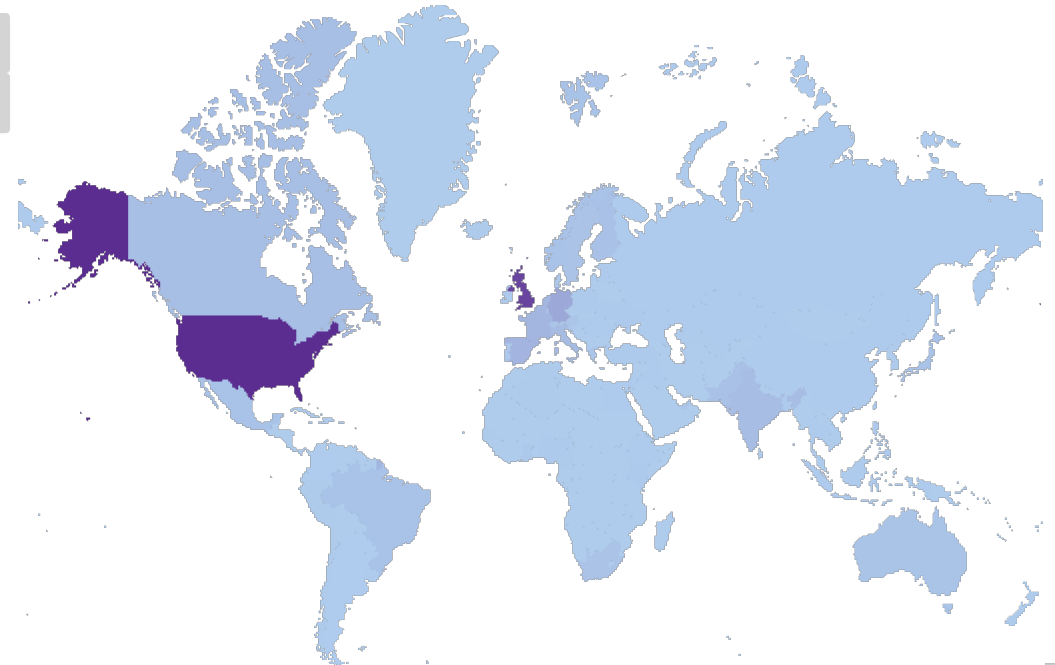
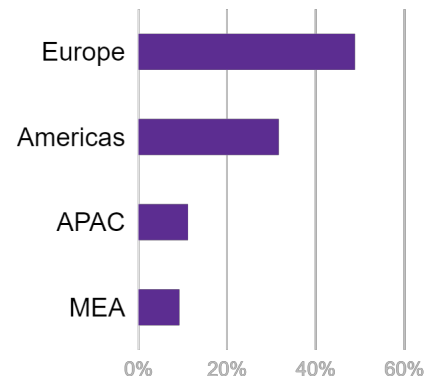


The survey consists of data collected from 1086 industry professionals from July 2020 to March 2023. IABM's Media Tech Business Tracker covers organizations of all sizes, focusing on Western Europe and North America.

Size of organization
by number of employees

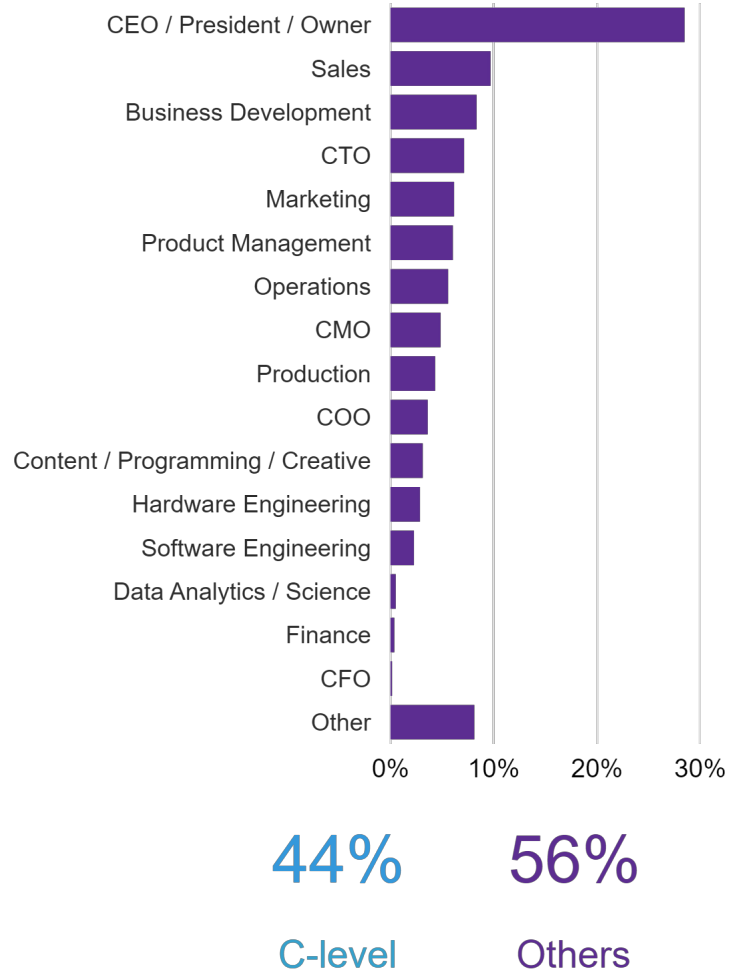


Macro region

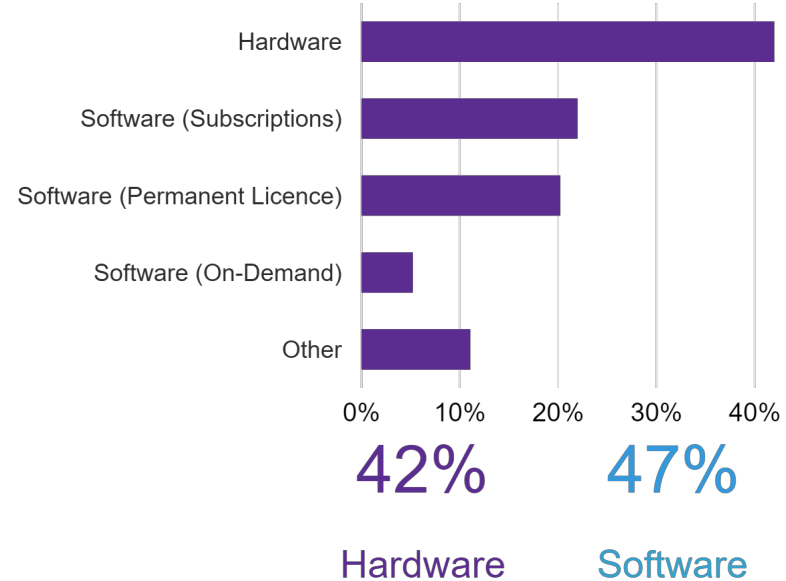


Company Profile

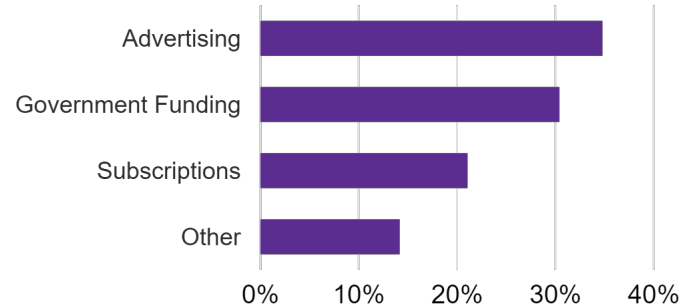
Job Roles & Departments



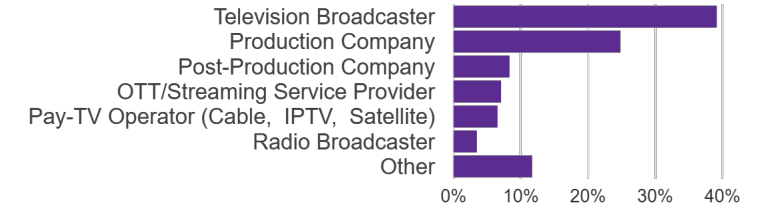
Suppliers' Primary Source of Revenue



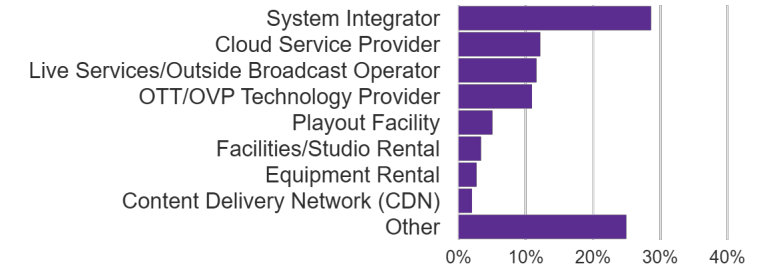
Media Primary Source of Revenue



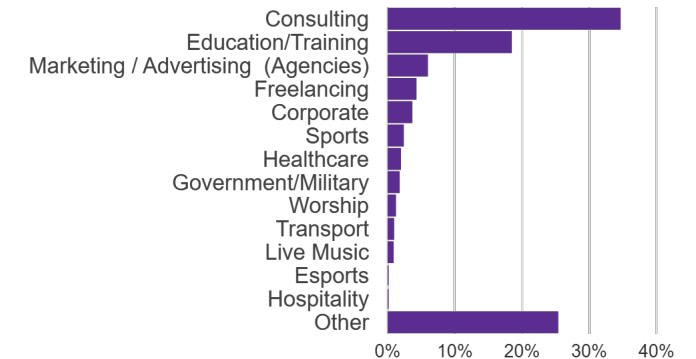
Media Companies



Service Providers



Other Companies

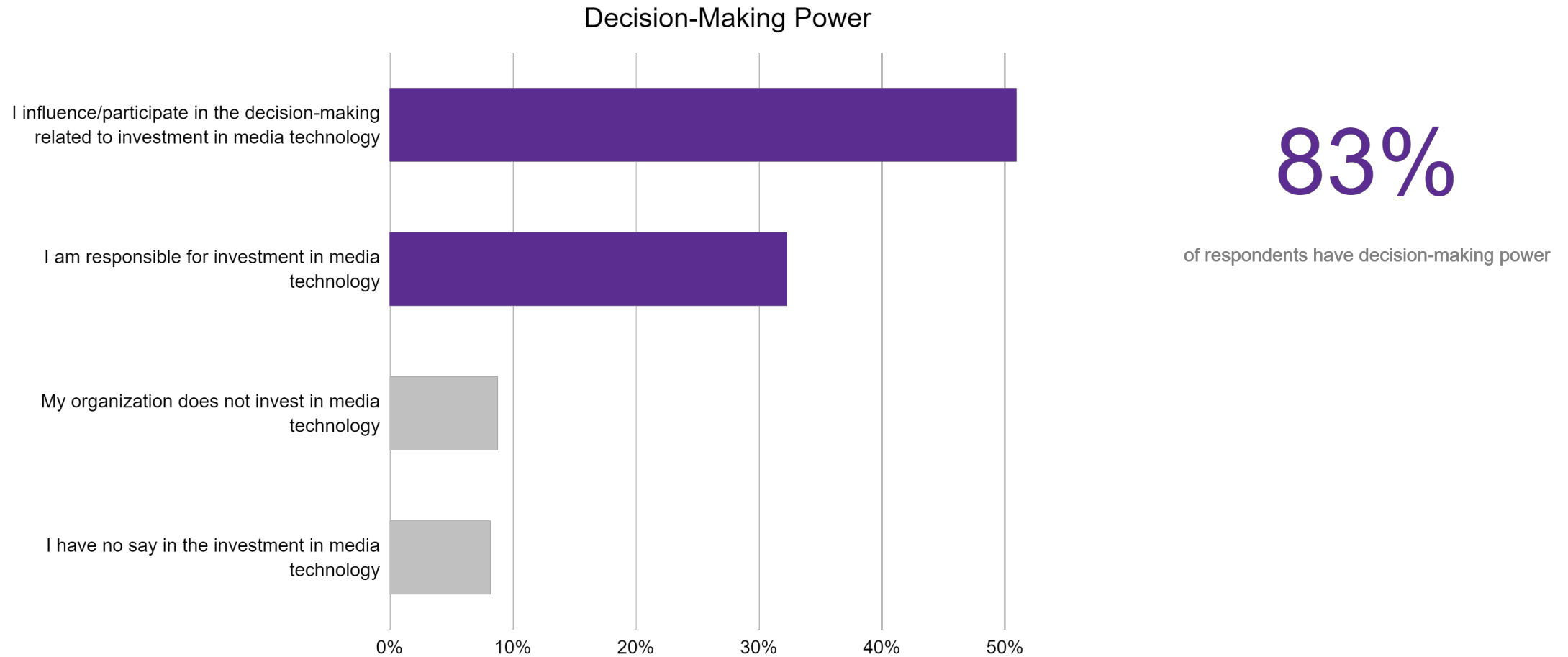


Q. Which of the following roles/departments best describes your responsibilities?

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?

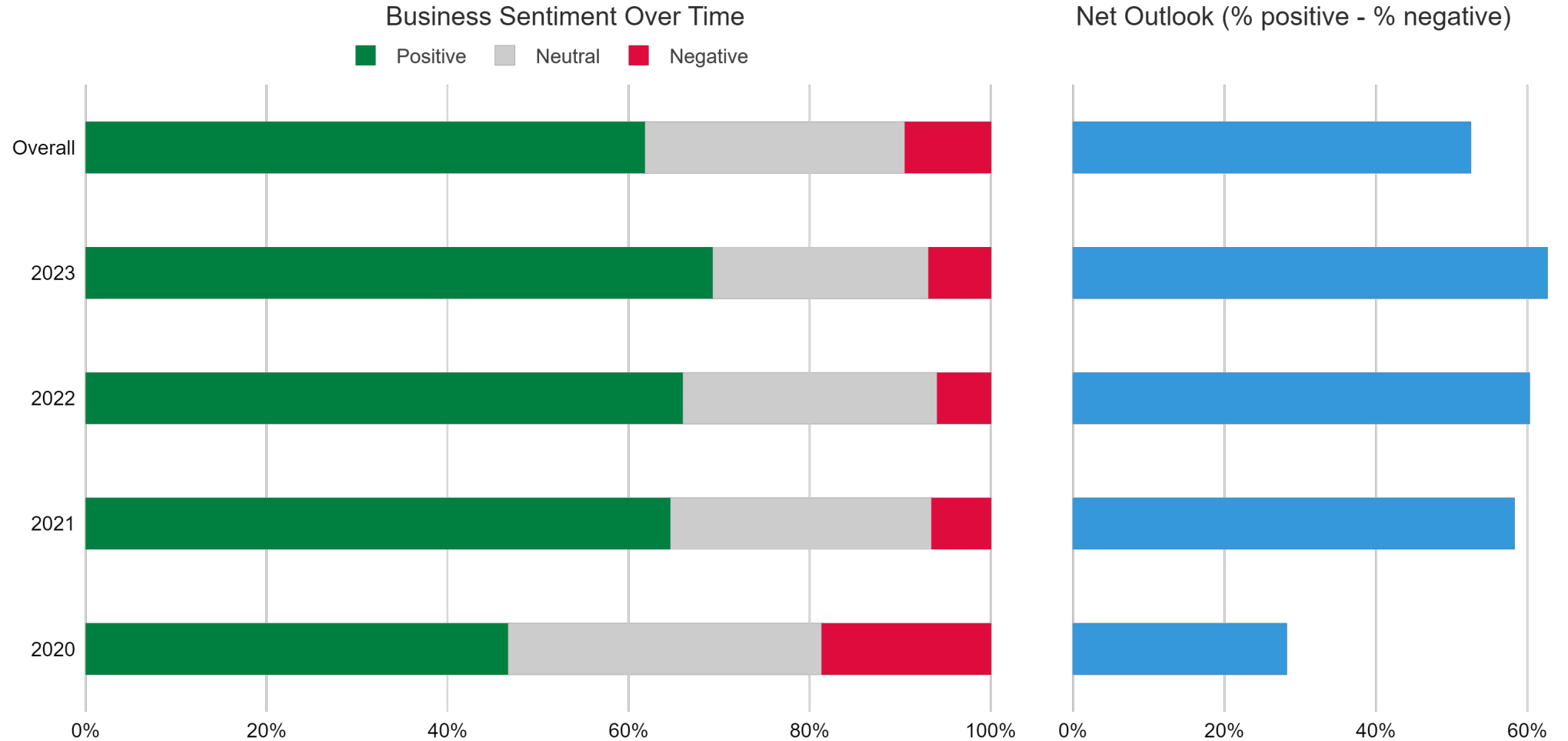
Q. Which of the following best describes your organization's main focus?

Investment Decision-Making



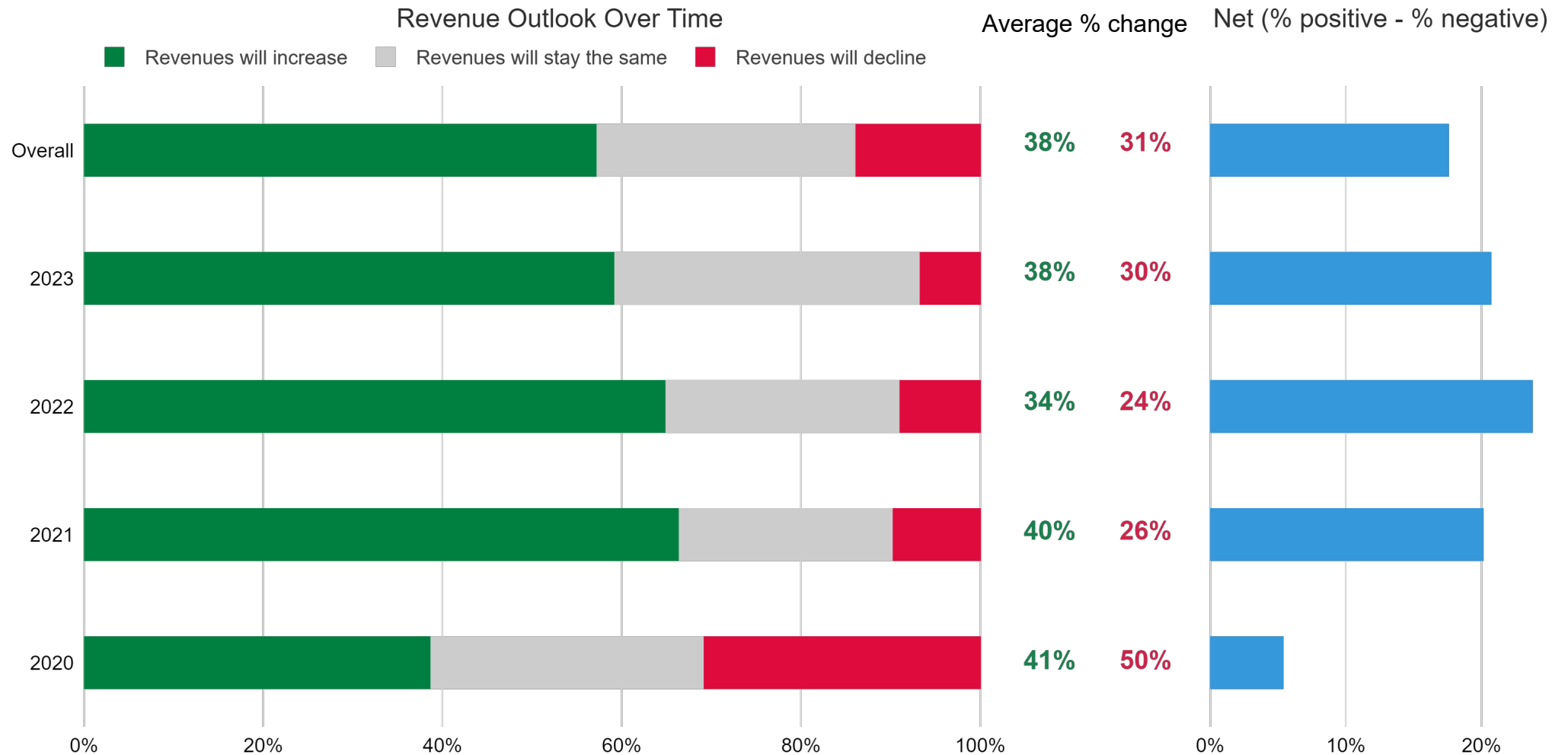
Q. Which of the following best describes your decision-making power when it comes to investing in media technology?

Business Environment Outlook



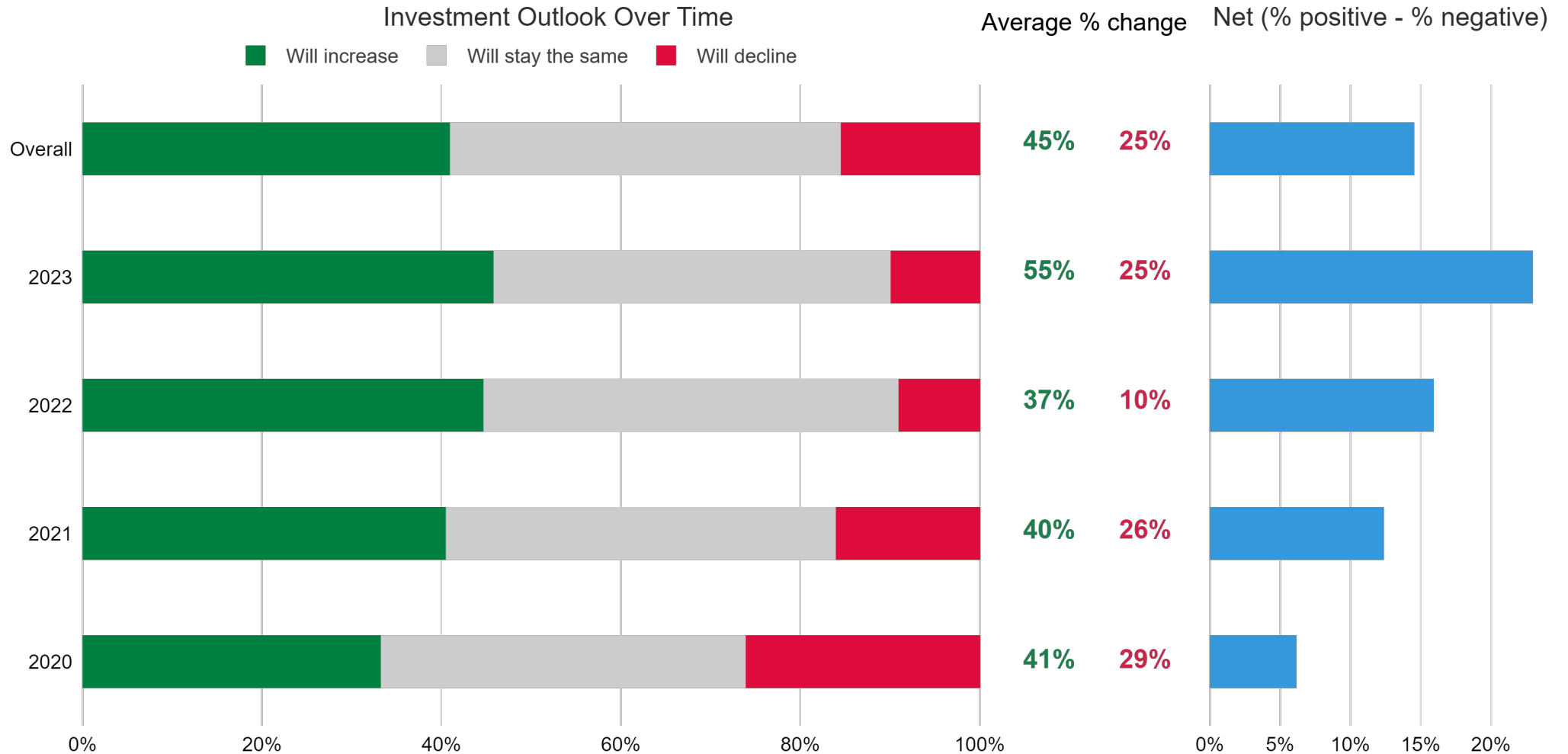
Q. What is your organization's outlook for the overall business environment over the next year?

Revenue Outlook



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?

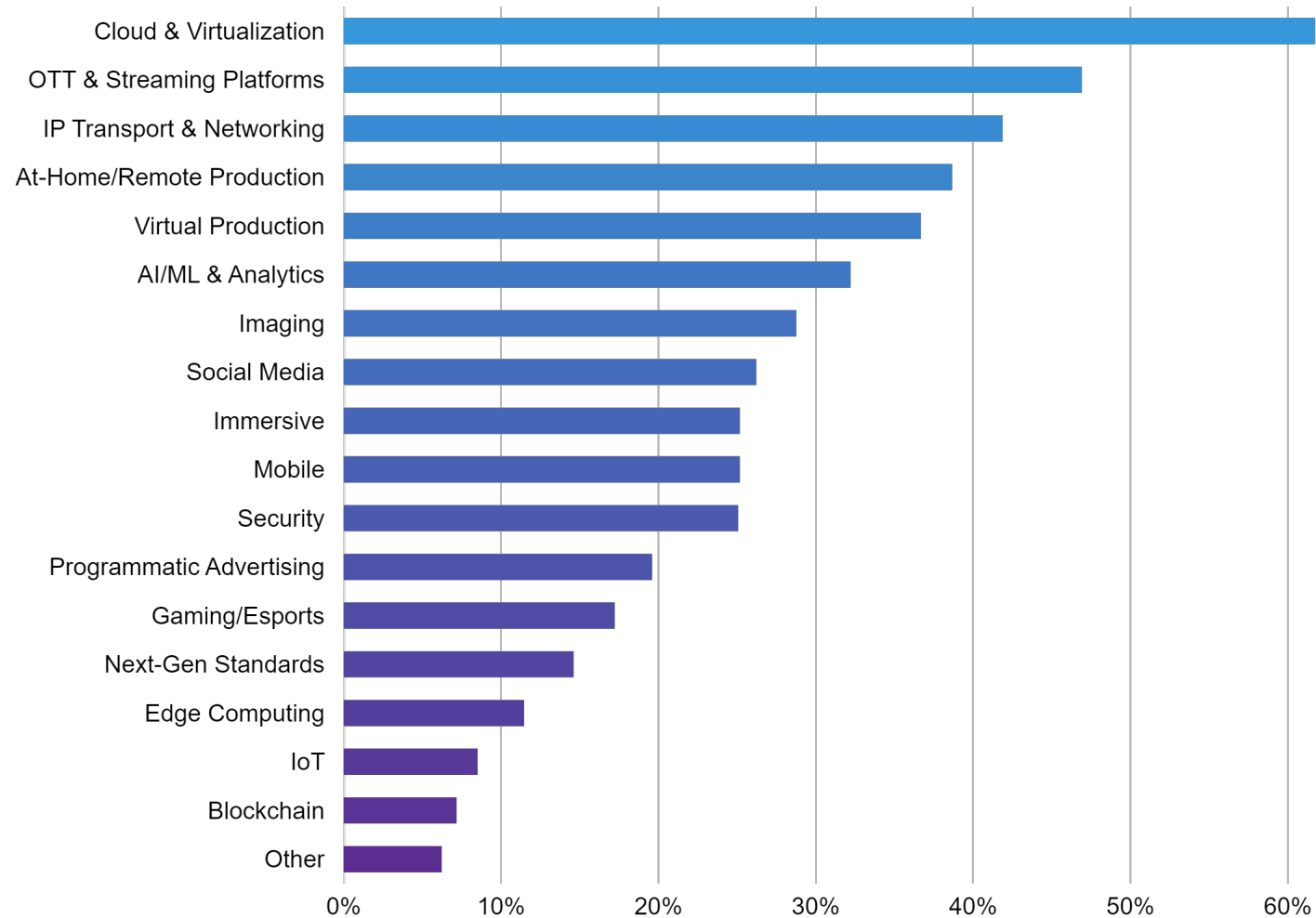
Investment Outlook



Q. What do you predict will happen to your organization's media technology budget over the next year? Q. By how much will your organization's media technology budget increase/decrease over the next year? Please provide a rough percentage estimate.

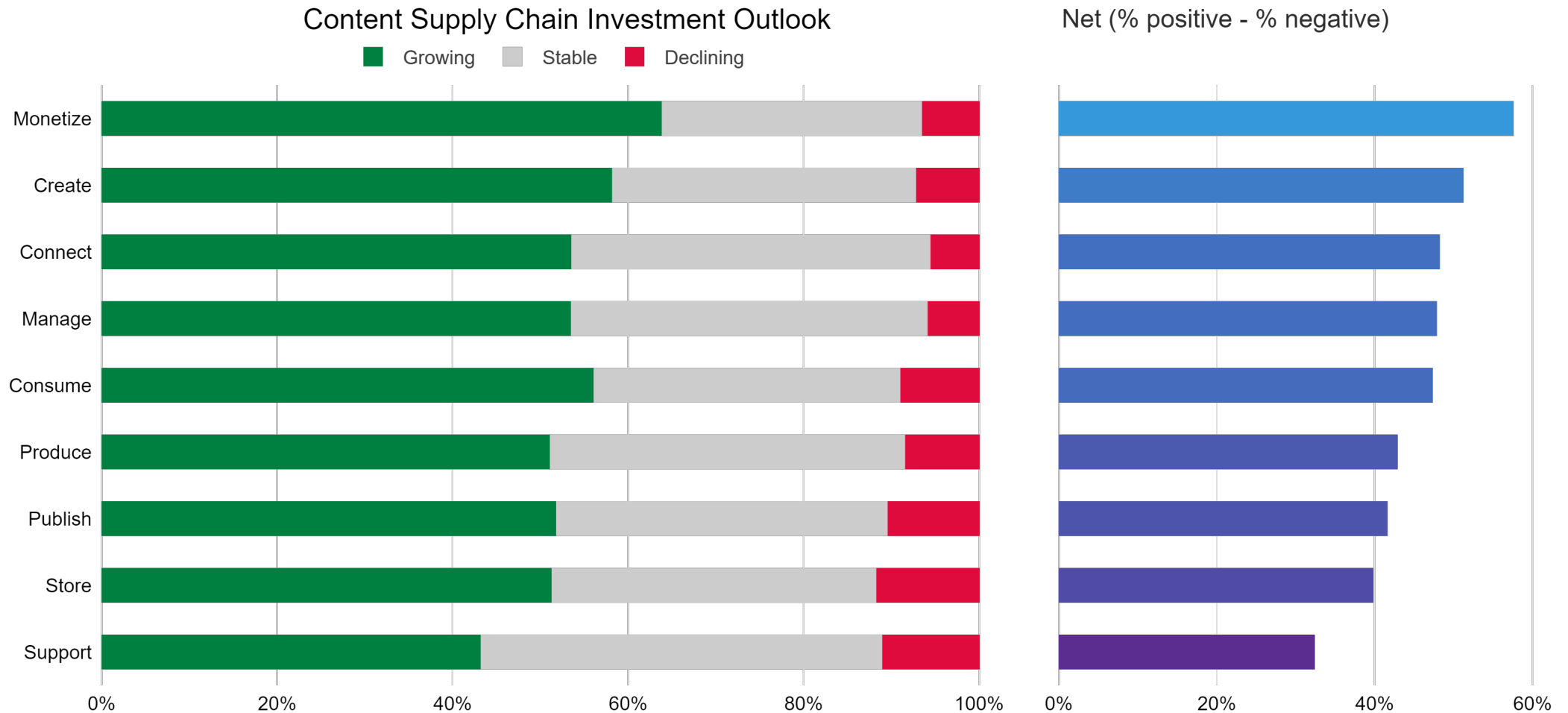
Technology Roadmap

Priorities in media buyers' and suppliers' technology roadmaps



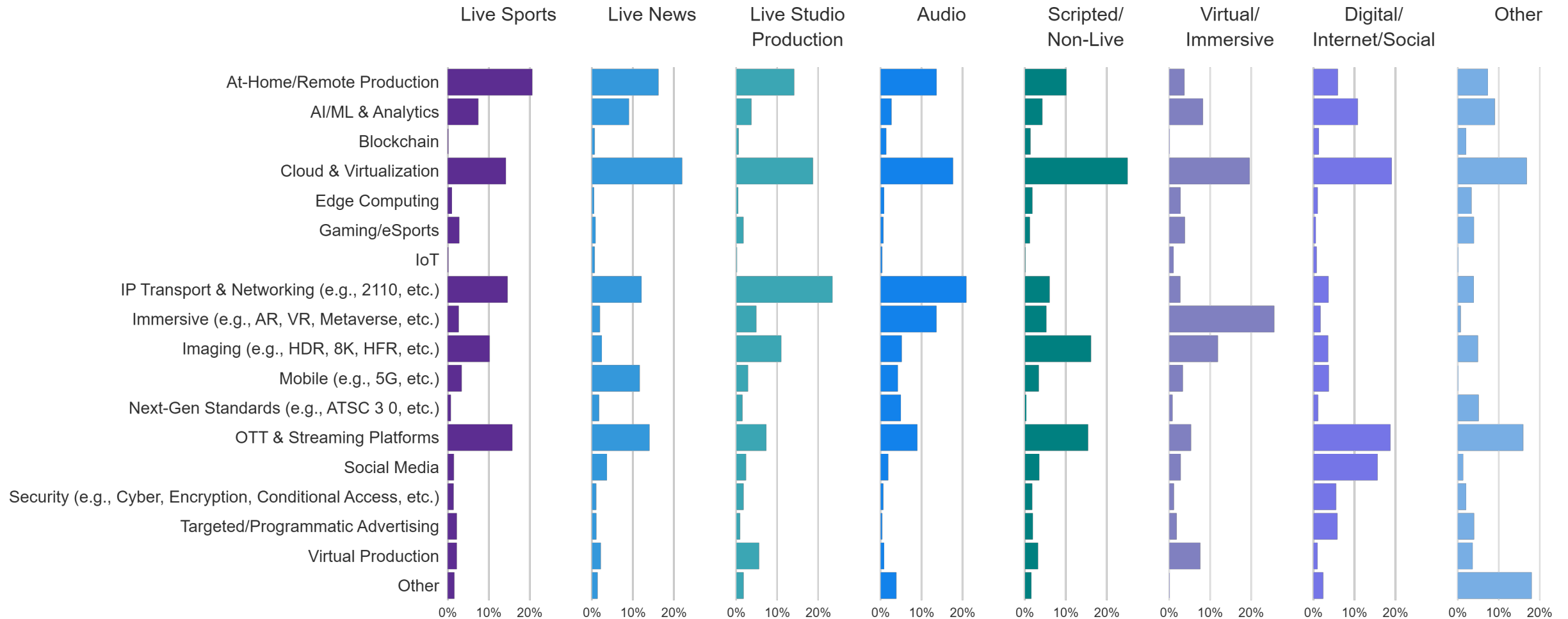
Q. What are the most important trends in your organization's technology roadmap? (max 3)

Content Chain Investment Outlook



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

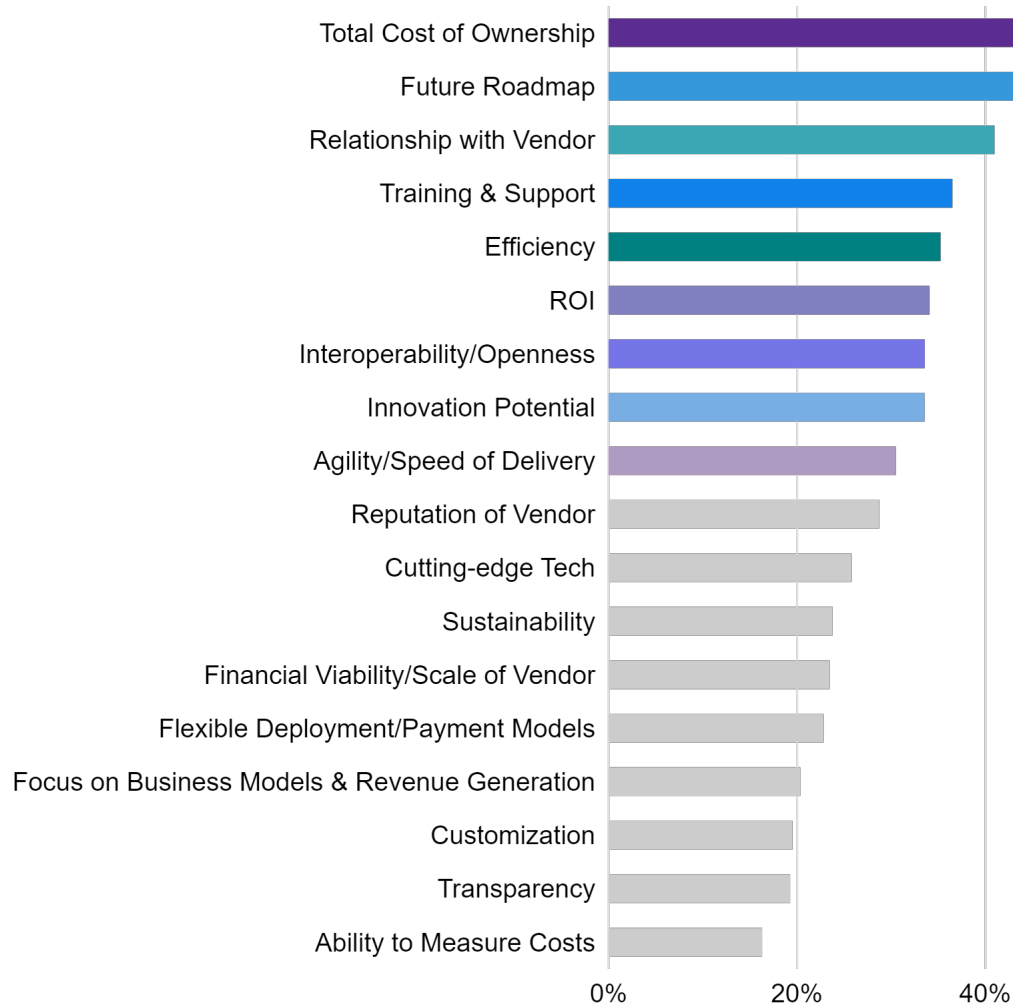
Content Sectors Technology Drivers



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

MediaTech Purchasing Factors

Most important purchasing factors



Total Cost of Ownership



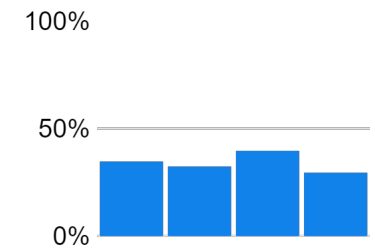
Future Roadmap



Relationship with Vendor



Innovation Potential



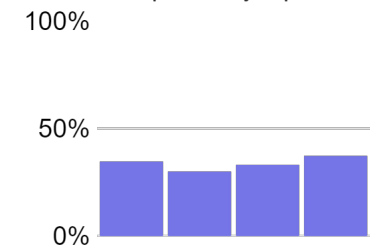
ROI



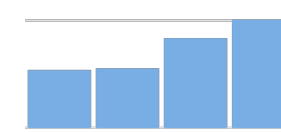
Efficiency



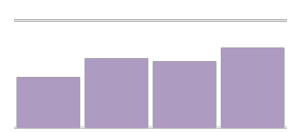
Interoperability/Openness



Training & Support



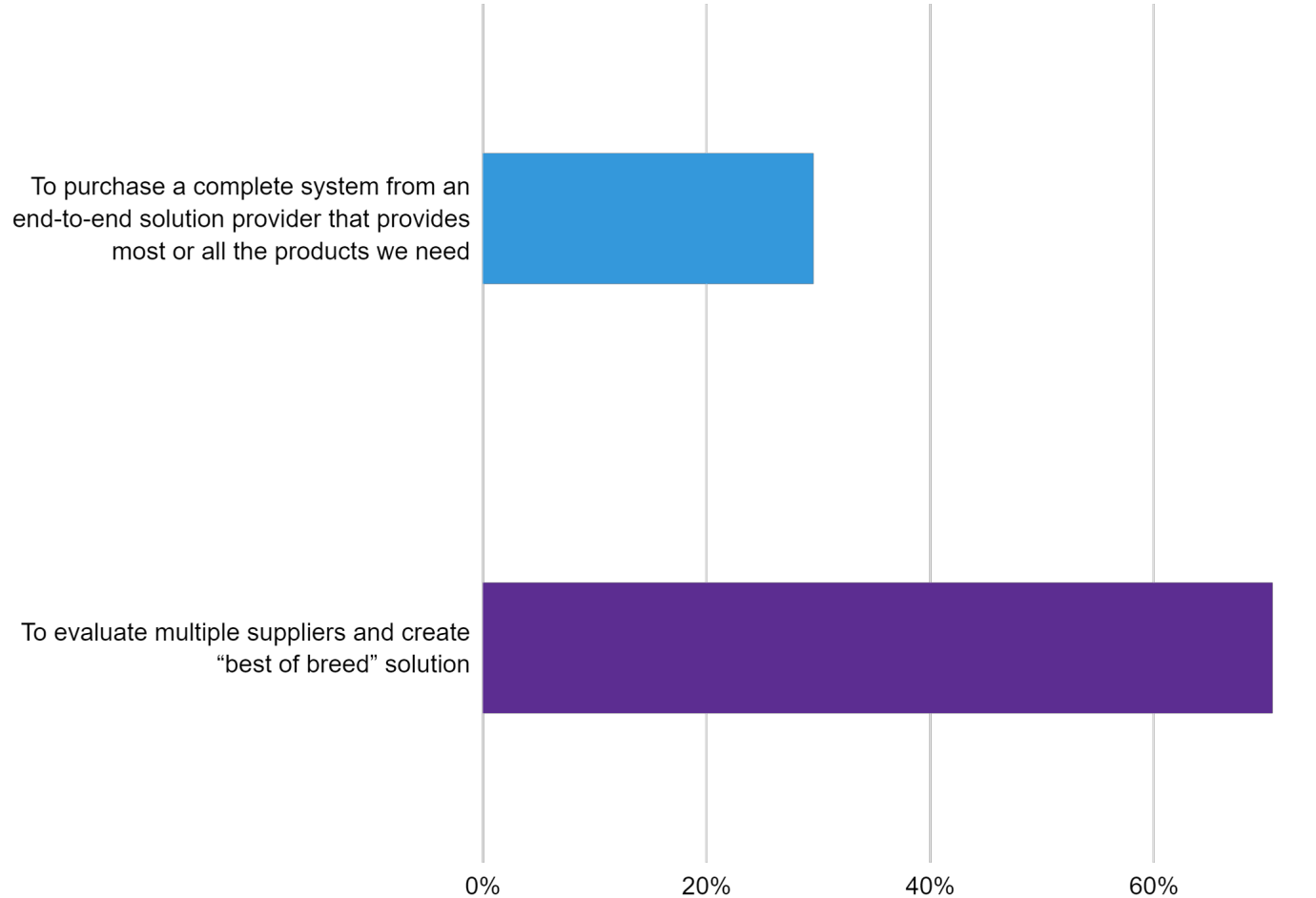
Agility/Speed of Delivery



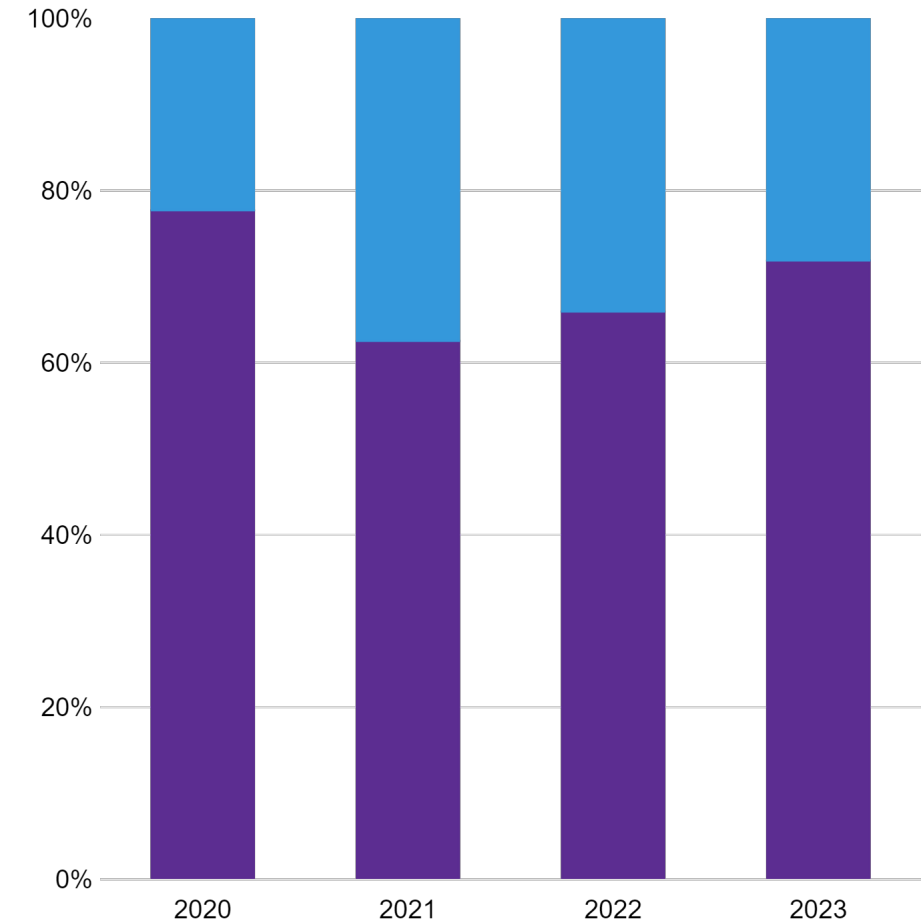
Q. In general, besides cost and technical specification, what are the most important factors that influence your decision to purchase media technology products and services?

MediaTech Buying Preferences

Buying preferences ("best of breed" vs. end-to-end)

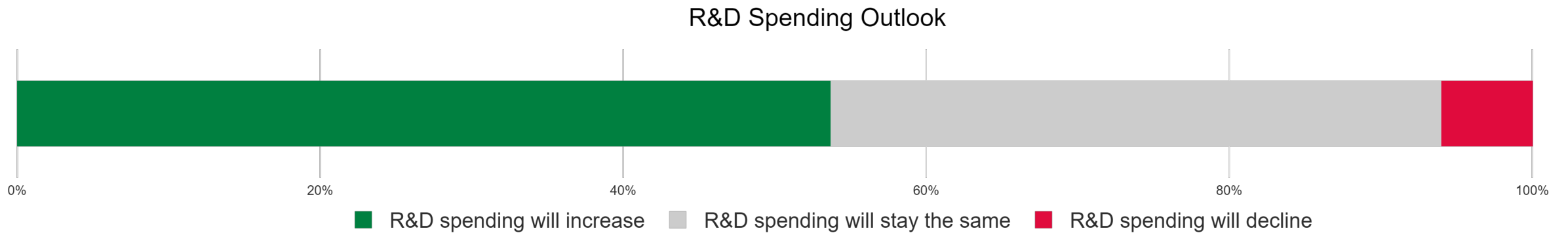
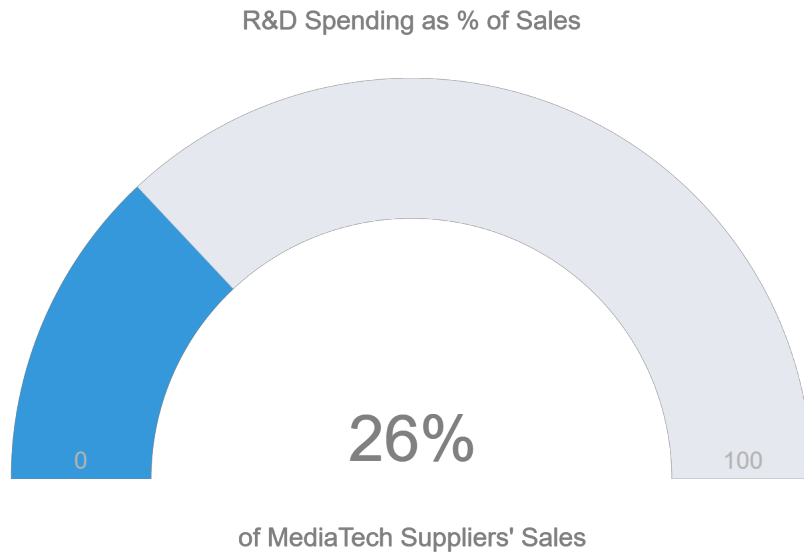


Buying preferences' change over time



Q. When purchasing media technology products, which do you generally prefer?

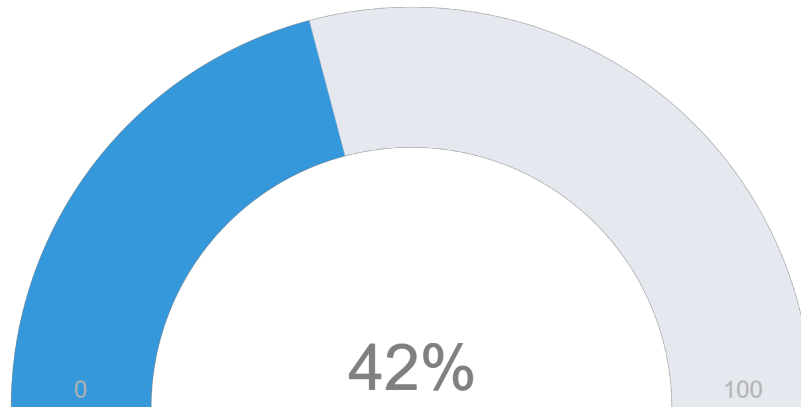
R&D Investment



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

Insourcing

% of MediaTech Insourced

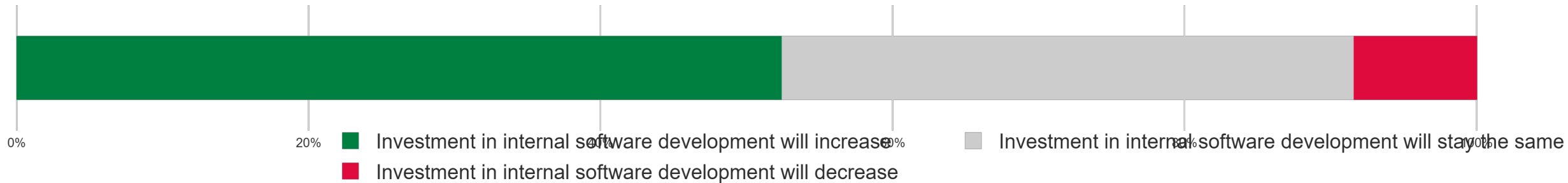


Base: MediaTech Users

Insourcing Investment Outlook

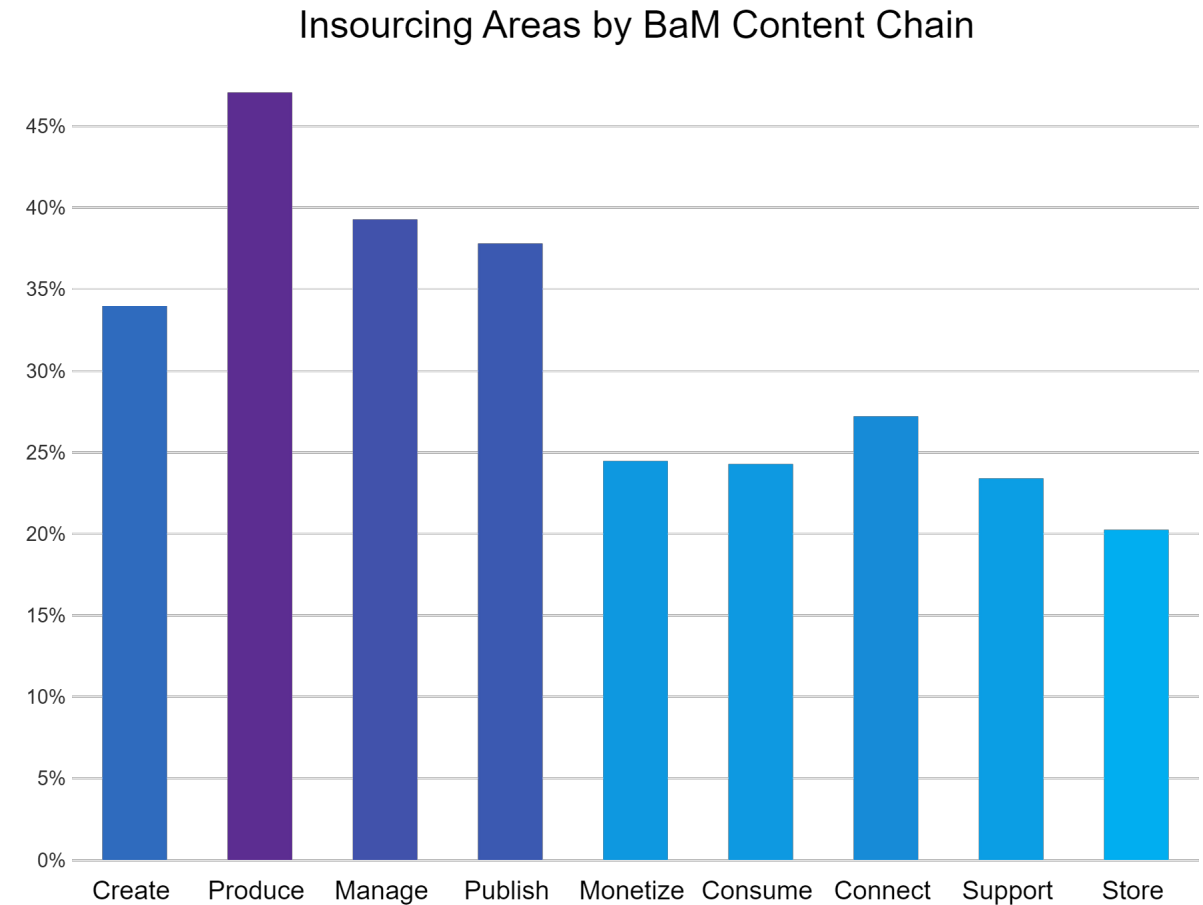
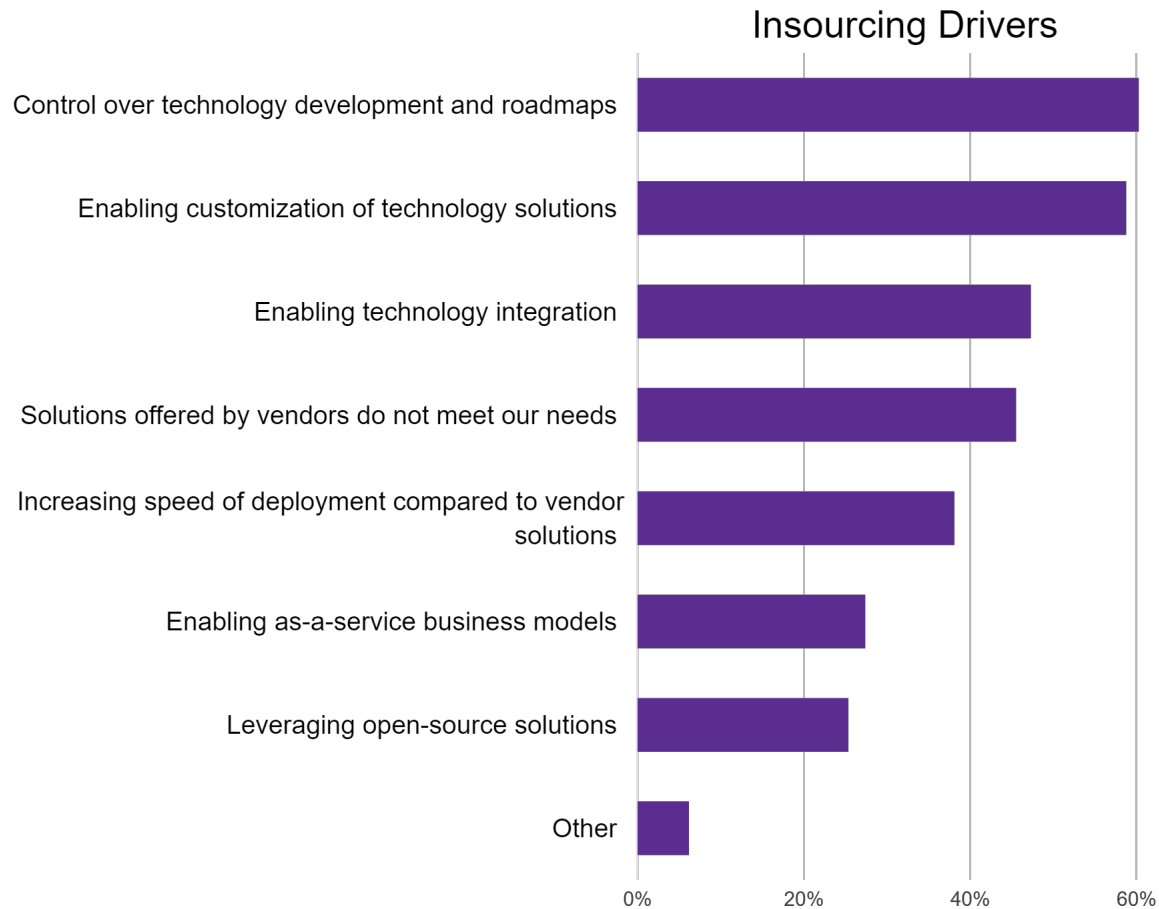


Insourcing Investment Outlook



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? Q. How will your investment in internal software development change over the next year?

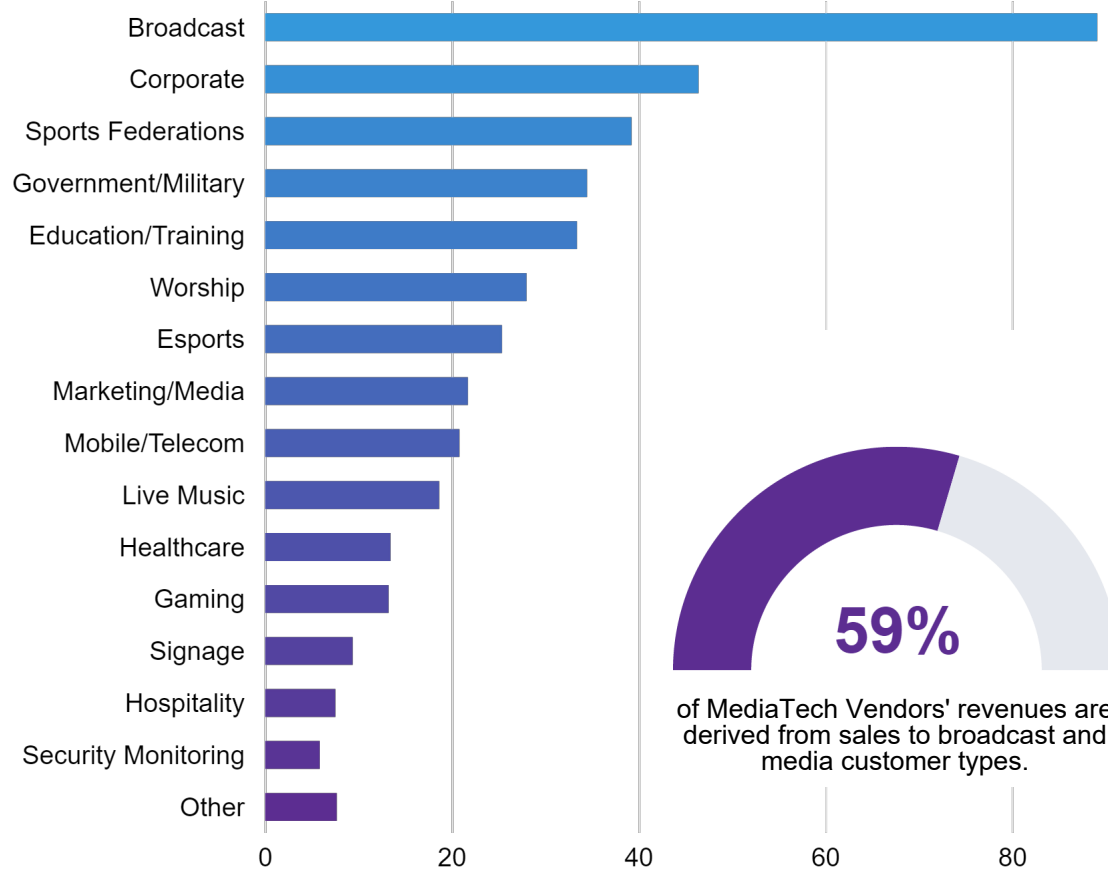
Insourcing Drivers and Deployment Areas



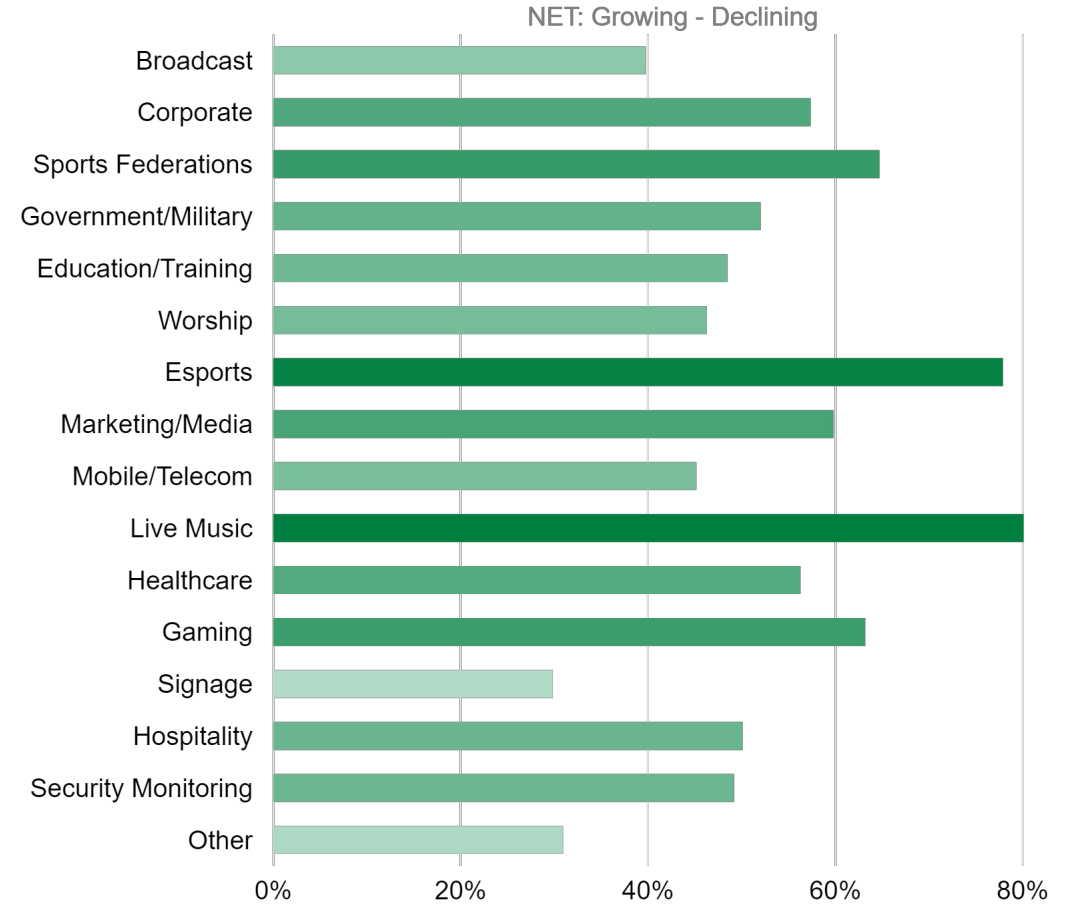
Q. Why are you investing more in in-house technology development capabilities? Q. Please select in which of the following supply chain blocks your organization has deployed/plans to deploy more in-house builds. Sample: MediaTech users.

Parallel Markets

Media technology suppliers' top 3 revenue segments



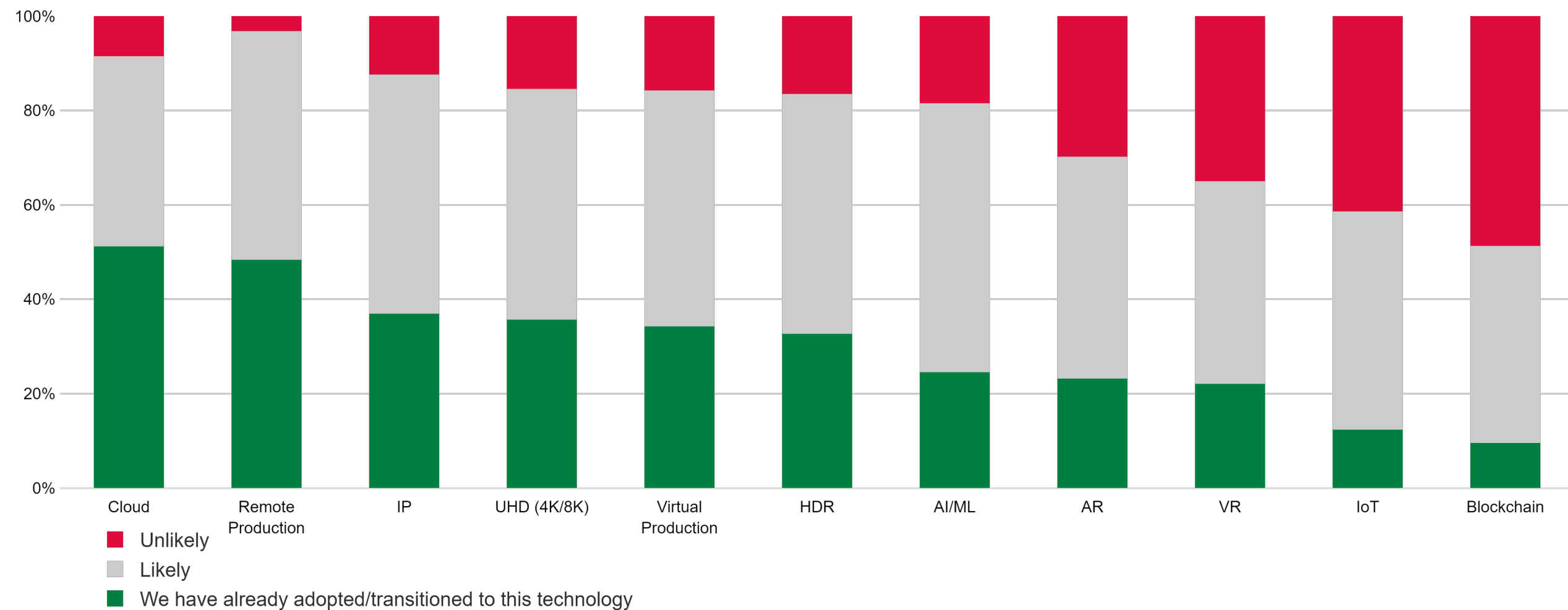
Supplier Segments Growth Outlook



Q. What are your organization's revenue segments? Q. What percentage of your company's revenues are derived from sales to broadcast and media customer types (broadcasters, streaming platforms, etc.)? Q. Could you please rank the following markets in terms of importance to your business (3 MAX)? Q. Please provide an outlook for revenue growth in the following markets over the next year.

Technology Adoption

Likelihood of Media Technology Adoption



Q. How likely is your organization to adopt/transition to the following technologies in the next few years?

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.

