dpp®

IBC 2025: Demand vs Supply

What's the score?

FEATURING

- Agentic AI
- AV Broadcast
- Data Driven Content

mediagenix

PRIME FOCUS TECHNOLOGIES

diversified

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Photo: James Dade

Introduction

Painting the picture

This report marks the sixth edition in the ***DPP's Demand vs Supply*** series, and the third consecutive year in which we have reported from both NAB and IBC. Together, these publications provide an annual snapshot from the media and entertainment industry's two largest international trade shows, charting how customer needs are evolving — and how suppliers are responding.

The concept is simple. We begin by listening. Through DPP events and workshops, we capture the demands of broadcasters and content companies: their challenges, frustrations, and ambitions. We then walk the exhibition halls to meet with technology vendors and service providers, learning how their latest products and services seek to address those demands. Each report presents the findings from this process, chapter by chapter - setting out customer demands first, before turning to supply side innovations.

As can be seen from the contributors section, it is always a privilege to have so many who are willing to provide their valuable insights to this work. And each year the pool of insight is far richer than we can possibly capture in a single publication. Difficult editorial choices must be made. But those contributions left out do often resurface in later reports - and we have recently added a 'What also caught our eye' section to cover more unique vendor innovations.

Over the past three years the *Demand vs Supply* series has explored topics as diverse as:

- **Working with AI** in its many forms - from localisation to generative, assistant and now agentic AI
- **Being Profitable** through FAST, next generation ad tech, audience analysis and engagement, archive utilisation, and now data driven content strategies
- **Operational Effectiveness** encompassing low and no-code solutions, modular asset management, pragmatic QC, and virtualisation
- **Production Innovation** including cloud live production tools, 5G and wireless tech, the rise of content creators, and now working with ProAV users

As these topics come directly from our members, the objective is not to provide an abstract view of the industry, but rather a reflection of the issues that matter most to those working in it.

In the last chapter of this report, we will provide a retrospective on some of the overarching themes from past Demand vs Supply reports and analyse how they fit into some of the larger trends we have seen at the DPP.

> **The old dichotomy of demand vs supply is giving way to something more collaborative.**

As the series has matured, one encouraging trend has become clear. The old dichotomy of 'demand vs supply' is giving way to something more collaborative. Customers increasingly seek to partner with their suppliers, and vendors are responding not only by refining their own products, but also by forming ecosystems and partnerships to fill gaps and create interoperable solutions. Competition remains — as it should — but this greater focus on collaboration is now a defining feature of the market.

IBC 2025: Three Key Demands

For IBC 2025, we will focus on these three key demands:

- Agentic AI
- AV Broadcast
- Data Driven Content

After covering *Co-Pilot AI at NAB 2024*, we were hesitant to feature AI again as a subject in its own right. The industry, quite rightly, seemed to be moving beyond AI as hype to focus on what it can actually deliver. And yet, **Agentic AI** - autonomous and goal driven - seemed to be different. The topic has also captured both imagination and anxiety in the industry and proved to be quite popular with customers, drawing the largest workshop we have ever convened for this series.

> **Agentic AI — autonomous and goal driven — has captured both imagination and anxiety in the industry.**

The second theme, **AV Broadcast**, emerged from conversations on the floor at NAB 2025. Amid uncertainty over tariffs and shifting markets, both content companies and technology vendors are now actively exploring opportunities in the *ProAV* space — producing content in verticals outside traditional media and entertainment. The potential is significant, but the challenges are equally real. This is a sector with different cultures, expectations, and business models. For those used to the broadcast world, it can feel like entering unfamiliar territory.

> **AV Broadcast is a sector with different cultures, expectations, and business models — it can feel like entering unfamiliar territory.**

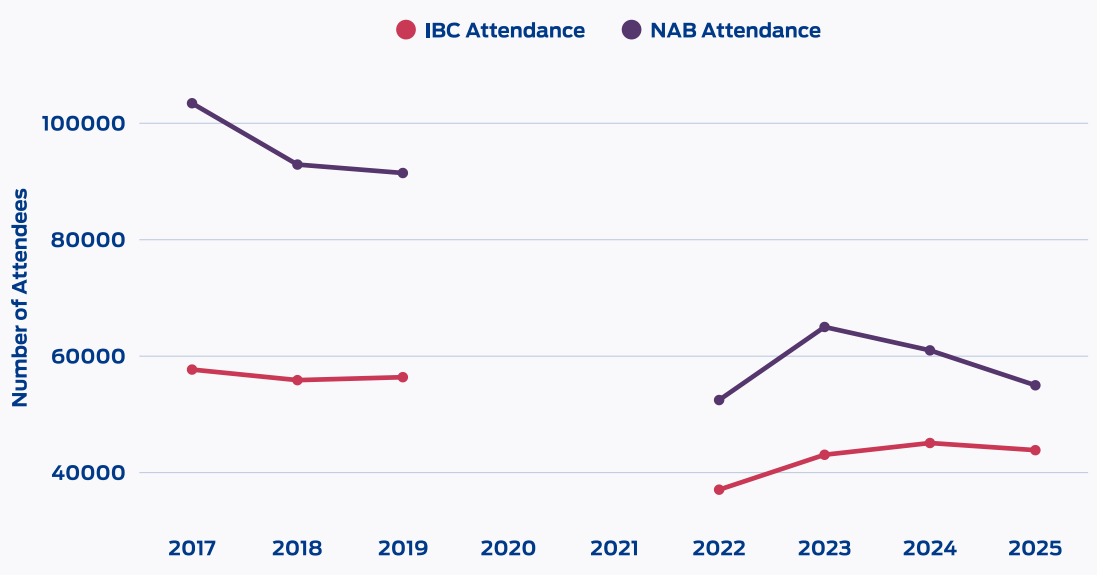
Finally, the topic of **Data-driven Content** reflects a shift we have heard consistently at recent DPP events. In an era of reduced profits and heightened competition for viewers and advertisers, relying on instinct is no longer enough. Commissioning, licensing, localisation, and distribution must be backed by data and generate ROIs. But this raises difficult questions. If decisions are increasingly data-led, how much room remains for creativity and intuition? And how does this impact on audience trust?

> **Relying on instinct is no longer enough. Decisions must be backed by data.**

The state of the trade show

Our *NAB 2025 Demand vs Supply* report introduced a side-by-side comparison of attendance at NAB and IBC since 2017 - the year both shows reached their peak. This provided room for comparison both before and after the Covid break.

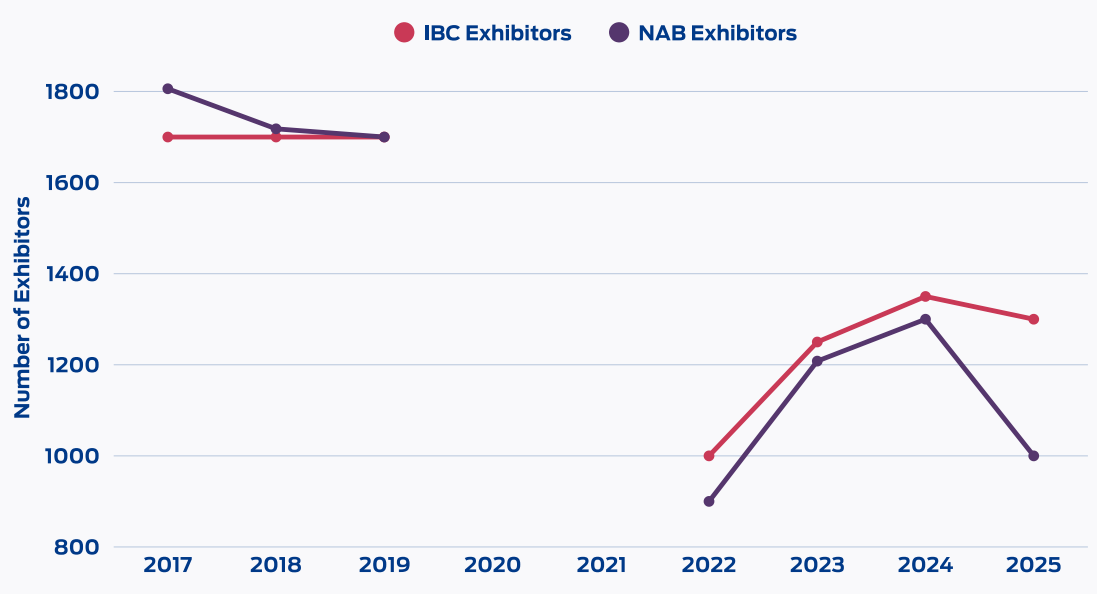
IBC and NAB Attendance 2017 - 2025



With IBC 2025 data now available, the overall trends are clearer. Both NAB and IBC suffered a dip in attendance in 2025. NAB in particular has seen attendance fall for two consecutive years to around 55,000 — less than half of its 2017 peak. While IBC's dip is more modest than NAB's, the trend is a worrying one for the two largest media and entertainment trade shows, as neither shows any sign of returning to pre-pandemic attendance levels.

Neither NAB nor IBC show signs of returning to pre-pandemic attendance level

IBC and NAB Exhibitor Numbers (2017 - 2025)



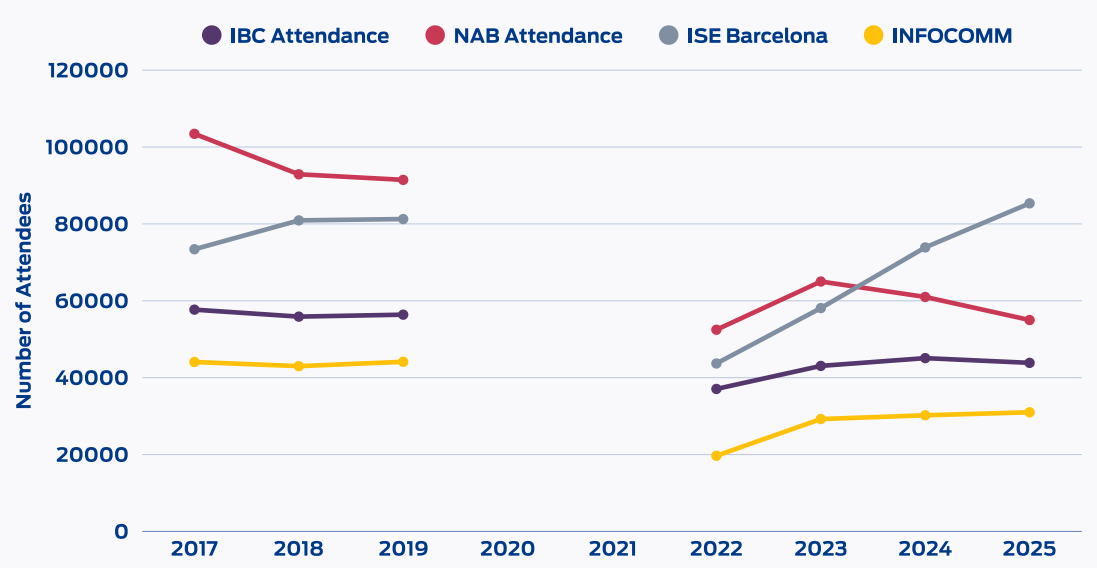
Exhibitor numbers at the two shows tell a similar story. Exhibition space at both NAB and IBC was recovering between 2022 and 2024, but took a dip for both shows in 2025. While the decrease was modest for IBC - from 1350 to 1300 exhibitors - it was a more dramatic dip for NAB - from 1300 to 1000. It is also an interesting phenomenon that IBC has more exhibitors yet fewer attendees than NAB.

Some of the vendors we spoke to that had chosen not to exhibit explained it was because they weren't convinced there'dd be sufficient return on the costly investment. As at NAB, a number of vendors questioned their commitment to return to the show in 2025. And indeed a couple of our contributors who previously had stands chose this year to meet us off the show floor.

Both NAB and IBC reported declines in exhibitor numbers in 2025.

Since AV Broadcast is featured in this report, we thought it would also be worthwhile to compare NAB and IBC with the two biggest ProAV conferences: ISE and InfoComm.

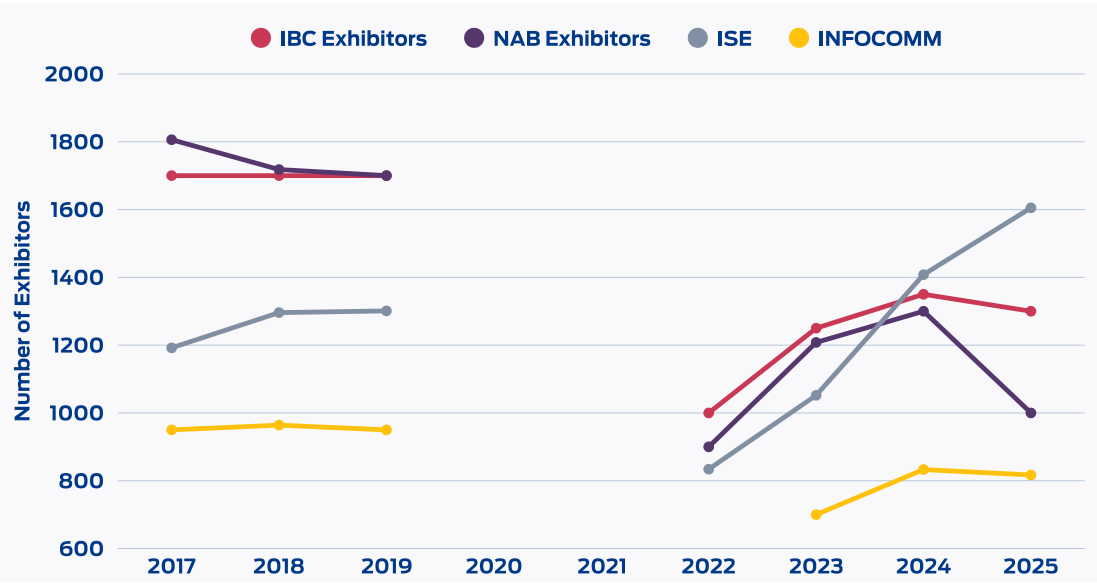
IBC, NAB, ISE and InfoComm Attendance Numbers (2017 - 2025)



The obvious standout is ISE. In 2025 it welcomed 85,351 attendees — becoming the only major show to exceed its pre-Covid attendance. InfoComm, by contrast, has experienced only minimal growth since an initial post-covid surge in 2023. It should be noted however that InfoComm alternates its location between Las Vegas and Orlando, and each draws a different US Regional (East Coast/West Coast) attendance.

> **ISE has emerged as the clear standout, with 85,351 visitors in 2025 — the only show to exceed pre-Covid attendance.**

IBC, NAB, ISE and InfoComm Exhibitor Numbers (2017 - 2025)



ISE was the only major trade show to post an increase in exhibitors in 2025. Both InfoComm and IBC recorded modest declines, while NAB saw the steepest fall. The result is clear: Europe now hosts the two largest shows in terms of exhibitors, and by a significant margin.

> **Europe now hosts the two largest trade shows in terms of exhibitors — and by a significant margin.**

This raises the question of whether industry trade shows in Europe and North America are becoming distinctively different. Anecdotally, we heard of a decline in North American visitors at IBC this year — an observation echoed by several DPP contributors.

Another question is around hardware. Some observers noted that with some notable exceptions, stands showcasing physical products at IBC appeared busier than those focused purely on software. And, while software approaches are gaining ground in the ProAV sector, it remains hardware centric.

> **Content creation tools are now common at ISE, while ProAV tech is visible at NAB and IBC.**

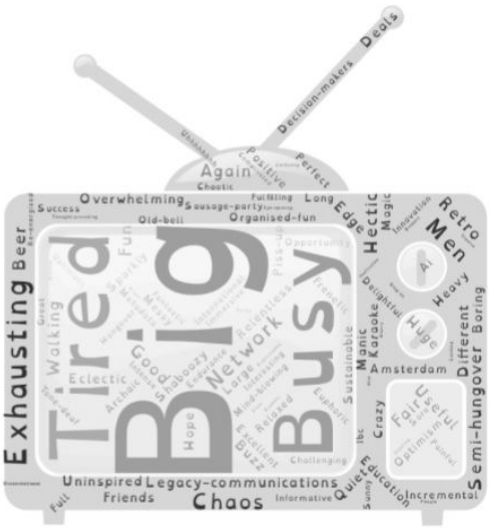
Of course, ProAV shows such as ISE and InfoComm serve a wide range of verticals across multiple industries. NAB and IBC also span several markets, but within the narrower domain of media and entertainment. Even so, the boundaries are blurring. Content creation and distribution tools are now common on the ISE show floor, while ProAV technologies such as collaboration systems and smart environments increasingly appear at NAB and IBC.

Both sides are actively reaching across the divide. IBC has launched initiatives with the AV User Group, such as speed pitching, to connect exhibitors with ProAV buyers. Meanwhile more broadcast vendors are dedicating stand space to enterprise solutions. In parallel, ISE is recruiting media and entertainment suppliers to exhibit in Barcelona.

Attending these shows remains a costly investment. The open question is how the numbers will evolve in the coming years — and which events will emerge as the long-term winners.

IBC in 2025

At IBC 2024, Tasha Jones, account manager at Techex, conducted a survey in which she asked everyone she met at the show to describe IBC in one word. In total she received 110 words from 172 contributors. With words such as big, frenetic, exhausting, optimistic, inspiring, these contributions captured the contradictions of a show that is both overwhelming and energising at the same time.



> **IBC can be both overwhelming and energising at the same time.**

As we reported last year, the mood at IBC 2024 was hopeful. NAB 2025, by contrast, was introspective and uncertain. The question for Amsterdam this year was simple: will IBC 2025 sustain that optimism, or echo NAB's caution?

Based on our conversations with customers and vendors at IBC 2025, the mood music in Amsterdam was noticeably more upbeat than at NAB in April. The halls of the RAI generally felt busy, though students seemed more visible than in previous years. Monday, traditionally quiet, was especially subdued, and the number of unoccupied stands suggested that more exhibitors opted to leave early.

> **Most customer interactions were pre-arranged — the walk-up sale is all but gone.**

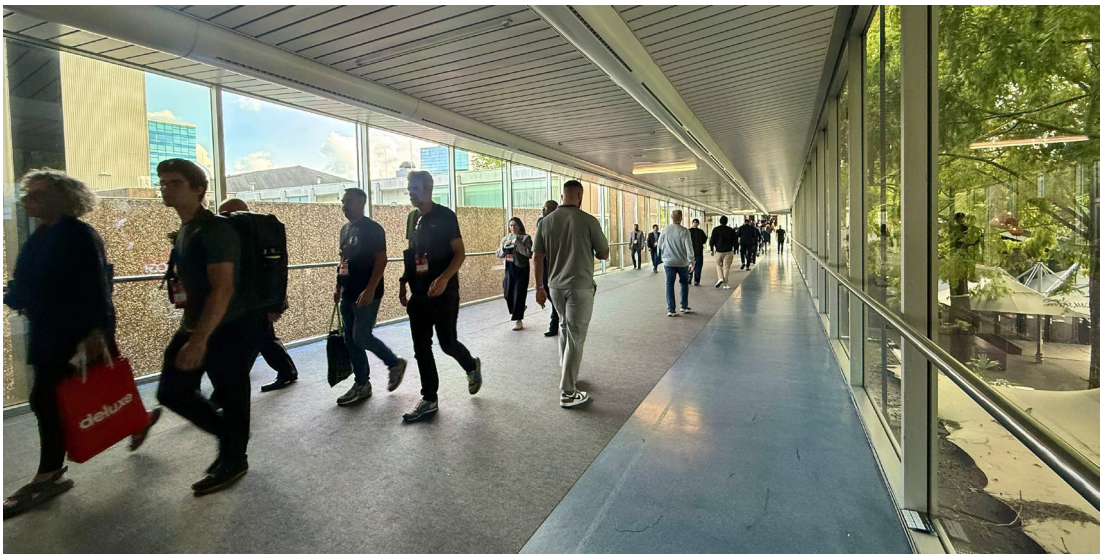


Image: James Dade

Exhibitors described mixed experiences. While footfall was broadly satisfactory, they also reported regular and sustained lulls in activity. As with NAB, the majority of customer interactions were pre-arranged, with one vendor remarking that the walk up sale is all but gone. This shift has encouraged some companies to reduce spend by booking less prominent stand locations or relocating altogether to nearby external venues. A similar trend is visible in Las Vegas, where suites at nearby hotels increasingly serve as alternatives to the show floor.

> **Vendors highlighted a perceived shortfall in decision makers.**

Several vendors also highlighted a perceived shortfall in decision makers. As with NAB, tighter travel budgets appear to have limited both the number of delegates and the duration of their stay. More companies are also preferring to send technical specialists—AI, cloud, and networking experts—rather than senior executives. One senior customer contributor explained before the show that he would rather stay home and send a team member who would "get more out of the experience."

> **One senior customer said he preferred to stay home and send a team member who would 'get more out of the experience.'**

So, while IBC 2025 felt undoubtedly more positive than an NAB show that took place in the wake of tariff announcements, many attendees reported feeling unsure as to why they were there. If vendor meetings are better scheduled directly; if networking is richer at smaller, focused conferences; if market research is best handled by subject-matter experts; and if the social element can be met at the local bar; then what exactly is the enduring role of the major trade show?

> **What exactly is the enduring role of the major trade show?**

Key Messages for Customers

Agentic AI

- Vendors are focused on your needs for agentic AI. But it is your caution that is holding them back
- There are plenty of strong PoCs that could progress with your support
- Suppliers are developing agents with guardrails, audit trails, and co-pilot modes
- The technology is evolving toward microservice-like architectures, in line with customer demands
- Interfaces are shifting from dashboards to conversation. Teams will work with agents through collaborative, dialogue-based controls

AV Broadcast

- Vendors are adapting but not downgrading broadcast tools: professional tech is being made easier to use for AV users
- With more content being produced, vendors are focusing on how AV users organise, access, and reuse assets for different purposes
- Hyper-converged and software-defined systems are emerging, offering scalability and reduced complexity
- But despite this progress some vendors still struggle to engage at the right level for AV customers. Don't stop telling them your rules of engagement

Data Driven Content

- Data maturity relies on strong foundations. Poor-quality datasets will undermine later AI and analytics efforts
- Operational and supply chain data is now as valuable as audience analytics to improve cost control, efficiency, and asset ROI
- 'Single source of truth' platforms converge internal data; 'Single pane of glass' tools can provide cross industry insight
- But the greatest barrier to progress is the ability and capacity of customers to work with complex data, rather than the technology itself

Key Messages for Vendors

Agentic AI

- Patience is required with customers whose anxiety is the biggest barrier to adoption
- But there are some clear and helpful messages:
- Customers remain wary of autonomy: they want agents that augment rather than replace human judgement
- Transparency and auditability are non-negotiable. Buyers demand clarity on how agents reach decisions and errors are traced
- Integration is valued over disruption. Customers want agents that fit into existing workflows - not wholesale replacement
- Adoption is slowed by transformation fatigue. Vendors must show clear benefits that justify further organisational change

AV Broadcast

- Demand is expanding fast in corporates, education, and houses of worship, where professional video is now a core communication tool
- Purchasing decisions are shaped less by technical depth and more by ease of use, reliability, and relevance to AV user practices
- SIs and consultants remain influential. But customers increasingly want a direct relationship with the vendor
- AV customers are fundamentally different from Broadcast customers. Don't patronise them; do understand the needs of their users

Data Driven Content

- Data is no longer a bolt-on, but a core business driver. Customers expect data to guide commissioning, scheduling, and monetisation
- Customers' biggest challenge is not data scarcity, but turning fragmented, unstructured inputs into coherent intelligence
- Customers expect clear ROI models — to understand how data can extend asset lifecycles and open new revenue streams
- Acknowledge creative concerns — automation must be framed as augmenting decision-making, not replacing artistic judgement

1 Agentic AI

Agentic AI is generating strong interest across a wide range of use cases. While many of the services on display remain in beta or proof-of-concept stages, there were also credible signs of maturity. Customers, however, remain very cautious. Vendors continue to emphasise governance, guardrails, and co-pilot modes rather than autonomy. This signals that adoption will initially focus on augmenting rather than replacing human action.

DPP Assessment

Nascent				Fully mature
1	**2**	3	4	5

Photo: DPP

Foreword

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PRIME FOCUS TECHNOLOGIES

As the Media, Entertainment, and Sports industries converge in Amsterdam for IBC 2025, one theme stands out with unprecedented potential: the rise of AI agents as orchestrators of creative, operational, and business workflows. No longer experimental, AI agents are now embedded across production, distribution, and fan engagement, redefining how content is discovered, created, and monetised.

Prime Focus Technologies (PFT) is at the forefront of this transformation with its CLEAR® AI platform. CLEAR® AI demonstrates how domain-trained, agentic systems can deliver results at scale - combining LLMs, computer vision, and multi-cloud infrastructure to accelerate time-to-market and unlock new revenue streams. Four areas illustrate the impact:

Metadata and Discovery: Agents transform archives into living libraries using advanced search, vectorised embeddings, and multi-modal recognition to instantly locate scenes needed for reuse and licensing.

Clipping and Snackable Content: Agents augment human creativity generating highlight, localisations, and marketing in minutes. In sports, ball by ball segmentation, commentary analysis, and automated highlights quickly deliver without compromising quality.

Localisation: Agents self-correct to produce accurate translation and transcription, looking deep into fluency, grammar, context, and cultural nuance—reducing cost while increasing speed to market.

Content Automation: Agents streamline repetitive, resource-heavy tasks—compliance detection, ad markers, segmentation—ensuring efficiency while maintaining editorial control.

AI will not replace creativity—it will amplify it.

What sets CLEAR® AI apart is its agentic orchestration model: specialised agents, working together within a multi-agent, multi-LLM ecosystem. This delivers outcomes that are faster, more reliable, and extensible across the content supply chain.

AI agents will not replace human creativity or judgment - they will amplify it. The winners will be those who let AI accelerate discovery, creation, and delivery, while humans focus on storytelling, strategy, and imagination. With CLEAR® AI, PFT helps customers embrace this new era, where AI agents become true teammates in the creative and business process.

1

> **In a lot of ways the IT department of every company is going to be the HR department of the future – they will maintain, nurture, onboard and improve a whole bunch of digital agents and provision them to the company to use.**

*Jensen Huang, CEO, Nvidia, quoted in **DPP CES 2025 Report***

Topic Summary

- Agentic AI attracted strong attention at IBC 2025, but most implementations remain at proof-of-concept or beta stage
- Customers are cautious, emphasising governance, transparency, and integration over raw capability
- The technology is evolving toward microservice-like architectures, with MCP and A2A emerging as critical enablers of interoperability
- Adoption is likely to be incremental, with agentic AI diffusing gradually into existing systems

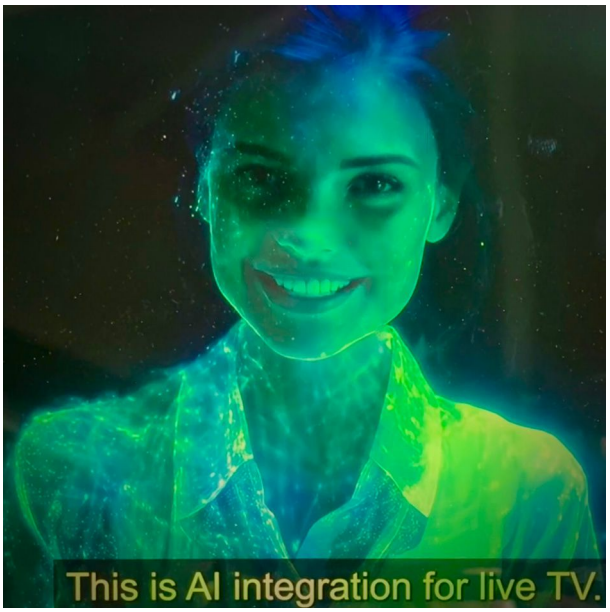

Photo: James Dade

1

Defining Agentic AI

Agentic AI is attracting unprecedented attention. At NAB 2025 vendors were discussing prototypes of agent-enabled tools. At IBC many of these prototypes are now appearing as live demonstrations. There is huge interest among customers in learning about practical applications for Agentic AI, but also trepidation about its potential for disruption.

> **At its simplest, the defining feature of agentic AI is autonomy — it presses the big red button itself.**

At its simplest, the defining feature of agentic AI is autonomy. Unlike co-pilot systems that provide a prompt and wait for human approval, an AI agent acts independently. It will push the 'big red button' all on its own.

Equally important is its orientation. AI agents are designed to complete tasks and fulfil rules. That may involve performing a single action, or performing a sequence of tasks - which can even be delegated to other agents. Being autonomous, agents make their own choices about how best to achieve the objectives they are given.

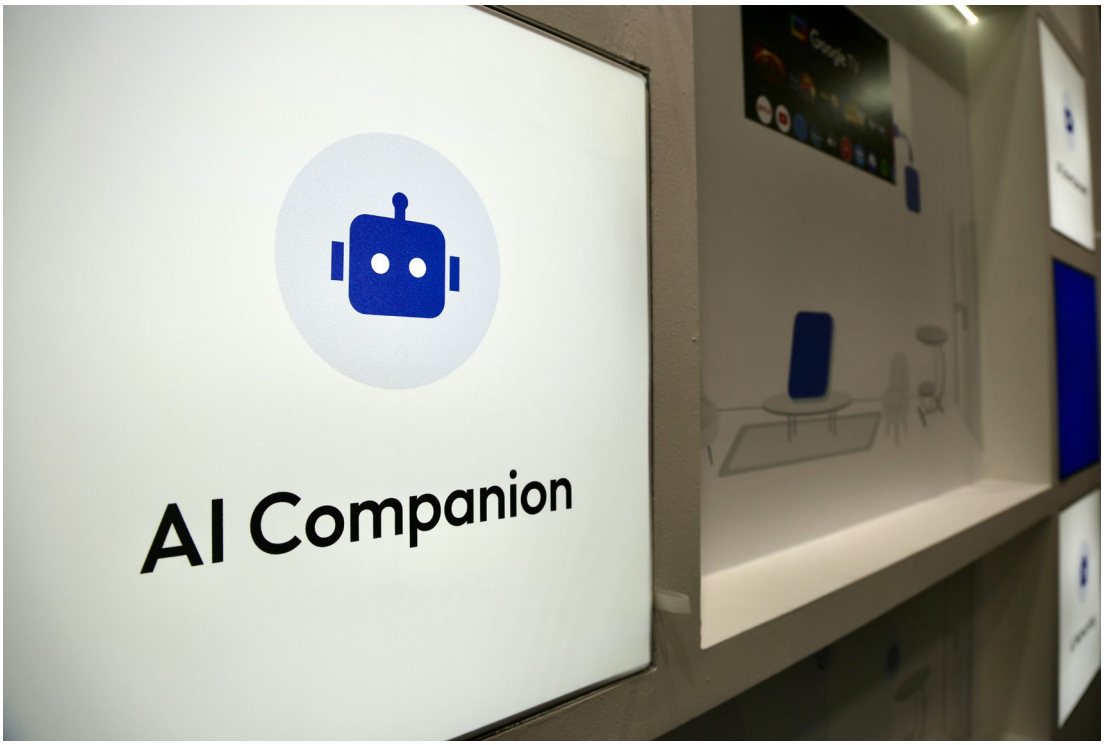

Photo:James Dade

And herein lies both promise as well as concern. On one hand, agentic AI can deliver defined results more efficiently without human involvement. On the other hand it requires faith that the AI agent will make the right decisions to achieve the results. This raises a number of important questions. What does this do to accountability? What happens when errors do occur? And how will humans adapt when their roles are changed or displaced by automation?

1

There was debate among our contributors over where the boundary lies between 'assistant' and 'agent'. The overwhelming opinion is that there must still be a human in the loop, but what is the role of that human: pilot, QC, or team leader? This is one of the definitional debates shaping both early adoption and agentic prototyping.

Being Transparent

It comes as no surprise that the strongest demand we heard from customers is for transparency from their vendors. In these early days, trust in AI is fragile. The idea of autonomous systems taking independent action only compounds the risk. For agentic AI to be adopted,its processes must be visible, explainable, and auditable.

> **For agentic AI to be adopted, its processes must be visible, explainable, and auditable.**

In practice, humans need to be able to read and review the 'thought' processes behind the actions taken by agents. Transactional logs must be both human-intelligible and also machine-readable. This is especially important in systems where agents are monitored by other agents and where several agents collaborate to complete a task. This is a topic explored in the 2014 film ***Ex Machina***, where Ava, a humanoid AI, is limited to communicating with other AIs in only human languages to ensure these interactions are human interpretable.

Transparency also matters because of bias. Contributors pointed to recent high-profile cases of discriminatory AI outputs. A biased agent interacting or producing content for the public could have devastating reputational and legal consequences.

Accountability

If transparency is the first demand, accountability follows swiftly on. Current governance frameworks rely on human, managerial oversight — the principle that 'the buck stops here'. With co-pilot and generative AI, this works: a human remains in the loop, responsible for the final output. With agents, however, the situation is more complex.

> **Accountability is more complex: how do you write an incident report when the error lies in an agent's decision-making process.**

One analogy is that of a manager who oversees a team of agents. But agents are not human subordinates. They do not fit neatly into existing reporting lines. Contributors raised questions such as: who is responsible when an autonomous system makes a wrong or inconsistent action? And, how do you write an incident report? AI error is very different from human error - and so are the potential

lessons learned. Contributors concluded that today's governance structures are not fit for purpose in an agentic environment. This hints at a need for greater transformation.

Avoiding Disruption

Customers are interested in exploring agentic AI without destabilising their existing operations. They are looking for integration, not revolution. Content still needs to be produced and distributed quickly and reliably and few early adopters will be willing to redesign their entire supply chains.

> **Most customers want integration, not revolution.**

One challenge is that many companies have already invested significant time and resources to transform and virtualise their existing workflows. Many companies have also already begun training large language models (LLMs) with their own content and business procedures. And many companies use different AI models for specific purposes across different business units.

The demand is therefore for interoperability. Customers need agents that can work within existing workflows with different AI models. This makes well-developed APIs critical. Customers want agents that can be invoked programmatically, embedded within existing workflows, and interoperable with human and machine actors alike. In short: customers require agents that are API-drivable.

AI/Human Relations

The human question is often harder than the technical one. Contributors repeatedly raised concerns about the relationship between people and agents within their organisations.

Photo: James Dade

Trust is again a persistent concern. It operates on both a corporate and human level. After the executive decision to invest in AI agents, it will be humans who will be working with those agents. Humans build trust through interaction and rapport — features that machines lack. As one participant noted, the

absence of small talk may seem trivial, but it matters when teams are asked to rely on non-human collaborators.

> **The absence of small talk may seem trivial, but it matters when teams are asked to rely on non-human collaborators.**

Job security is another concern. A human who has performed a job in a particular way for five years may not be happy with a new AI agent doing it completely differently. Public campaigns encouraging firms to “hire agents, not humans” and “humans WFH in Ibiza” have heightened fears that roles will be automated out of existence. While much of this is hype, the anxiety is real, and it impacts adoption.

Conversely, there is also a risk to business security. Many contributors raised the spectre of “dark AI,” where employees quietly delegate tasks to unapproved agents. This risks exposing IP and also undermines governance.

> **Dark AI — employees quietly delegating tasks to unapproved agents — is a growing concern.**

Finally, contributors stressed the importance of recognising that AI is not deterministic. Unlike rule-based software, agents work in probabilities. Errors are inevitable. Designing processes that combine human and agent strengths, while mitigating weaknesses, will be essential. Humans will need to learn ways of working with their AI colleagues.

More Transformation

Taken together, these concerns point towards the need for significant organisational change. Agentic AI does not sit neatly within either 'human resources' or 'software systems'. It operates in between. But CTOs doubling as HR directors doesn’t feel like a model for the future.

> **Agentic AI sits somewhere between HR and IT — requiring new structures of governance, oversight, and training.**

Companies will need new oversight structures, policies, and governance models. They will need to define where agents can act independently, and where humans must remain in the loop for safety, compliance, and ethics.

Operationally, there will need to be a transition away from deterministic workflows to more adaptive approaches that allow for AI decision making. It will also require the building of more robust data pipelines for agentic data which are traceable, provide lineage and are accessible in real time.

There will need to be significant investment in training if humans are to learn to work alongside agents. And the agents themselves will also need continuous training to ensure they are making the right decisions.

> **We've had transformation fatigue already — IP, cloud, virtualisation. We need to take this one step at a time.**

As one customer put it, "we've had transformation fatigue already — IP, cloud, virtualisation. We need to take this one step at a time." There is interest but no desire to rush in. As one vendor put it, "we might be at the crawl stage, but with our customers we are only now showing them how to turn over".

Cautious but Ambitious

> **Agentic AI was everywhere at IBC—but still mostly in beta.**

At IBC 2025, agentic AI was everywhere — from keynote stages to demos across nearly every show floor. Much of what was exhibited remained at the beta or proof-of-concept stage, often built hand-in-hand with early-adopter customers who were reluctant to be named publicly. The hesitancy reflects the sensitivity that still surrounds AI — and in particular autonomous systems — both inside organisations and in the public eye. Yet amidst the prototypes, some solutions are showing real signs of maturity. In particular, vendors demonstrated credible progress in creating the underlying fabric for agent creation and orchestration, pointing towards a near-term future where AI agents can be deployed as repeatable, scalable components of production workflows.

Photo:James Dade

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That said, the zeitgeist is noticeably different from the height of the generative AI hype cycle. Whereas early generative AI demonstrations often emphasised speculative and eye-catching use cases, the current crop of agentic prototypes focused on practical, goal-oriented tasks. Many demos emphasised the automation of repetitive processes which, while less glamorous, represent areas where efficiency gains are most readily achieved. Vendors appeared to have learned from the over-promises of the past, framing their work less as radical visions of the future and more as incremental enhancements to existing workflows.

> **Adoption will start small: narrow use cases first, ambitious applications later.**

Agent Creation Platforms

Microsoft, AWS, Prime Focus, Avid, Cuez

Agent creation platforms are being designed to help organisations build agents to perform specific tasks. These are narrow in scope, focused on discrete functions, and intended to be deployed as needed across a workflow - in a very similar way to microservices. A typical production chain might employ separate agents for visual analysis, metadata tagging, compliance checking, and publishing - scaling up or down as needed with demand. However, the challenge is less about creating individual agents than ensuring they perform consistently, interact reliably, and exchange information transparently with both other agents and human operators.

> **The challenge is less about creating individual agents than ensuring they perform consistently and interact reliably.**

As with microservice architectures, agent coordination requires the equivalent of a service bus. Two technical developments have made agentic AI possible - and dominated discussion at IBC. Model Context Protocol (MCP), introduced in 2024, provides a middleware layer between AI models and external systems. Rather than wiring agents directly into a CMS or broadcast automation tool, MCP exposes these systems as standardised and permissioned endpoints. This enables users to create guardrails against unwanted actions and generates the detailed logging needed for governance and reversibility. Complementing this is agent-to-agent (A2A) communication, which defines how agents interact with each other. By enabling negotiation, delegation, and error resolution, A2A transforms a collection of micro-agents into an orchestrated, coordinated workflow.

Microsoft's *Copilot Studio* is one of the most widely recognised technologies for agent creation and was the most cited by the customers who contributed to this report. *Copilot Studio* enables users to build custom agents via natural language or graphical interfaces - with the option to create agents from scratch or to begin from a variety of pre-existing templates.

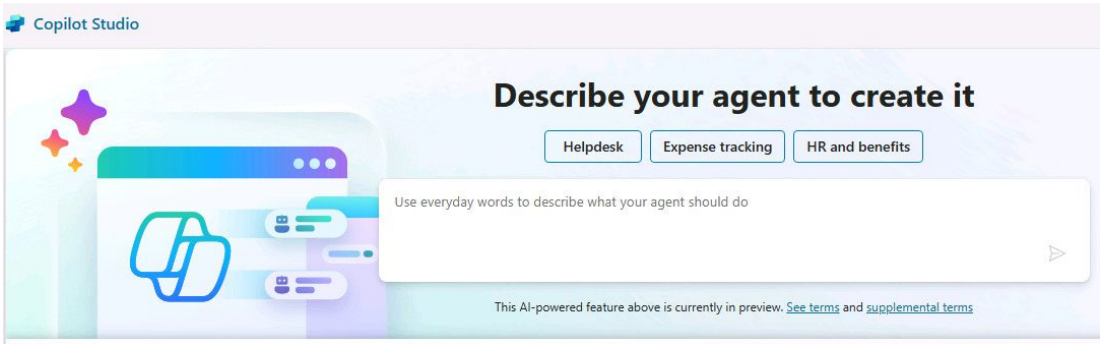

Image: Microsoft

These agents can operate across Microsoft environments such as *Teams*, *SharePoint*, and *Copilot Chat*, but can also extend to interact with external systems through connectors. Governance features—such as centralised administration, usage analytics, and lifecycle management—were prominent, underlining customer demands for oversight.

> **Governance features—centralised administration, usage analytics, and lifecycle management—were prominent.**

At its booth in hall 5, **AWS** exhibited its *Strands Agents* framework for AI agent creation. The *Strands Agents* framework consists of an open-source SDK combined with a visual *Strands View* interface that enables users to construct agents linked to *AWS Bedrock* models via no code tools. Agents can be designed with capabilities such as file browsing, video summarisation, or, as in the demo, reporting the weather in Amsterdam.

> **Media teams without specialist engineering skills could create and adapt agents within minutes.**

With both AWS and Microsoft, the emphasis was on accessibility: media teams without specialist engineering skills could create and adapt agents within minutes, integrating them into wider ecosystem services as well as with 3rd party tools and data sets.

Prime Focus Technologies (PFT) presented a more media focused implementation. Via its *CLEAR AI* platform, PFT enables users to not only create new multi-model agents but to also orchestrate them. With more than 20 prebuilt agents with specific media functions, users can select and deploy agents according to capability, cost, and context. There is also support for users to develop their own custom agents. By connecting agents to its own platform components, PFT has enabled its users to easily automate the *CLEAR AI* functions such as metadata generation, compliance, localisation, or content reframing they use every day.

Cuez developed a prototype of MCP and A2A for the **IBC accelerator project - AI Agents** *for Live Production* enabling five different vendors to create an integrated solution in five months. Cuez

illustrated how diverse micro-agents could be assembled into a functioning workflow through the use of agent cards: standardised, machine-readable documents that act as digital business cards for AI agents, defining their capabilities, specifications, and communication protocols. This approach presents a model of how agents from different vendors can work together in a broadcast ecosystem.

Agent creation is becoming a foundational capability.

The message at IBC 2025 is that agent creation is a foundational capability. It is the basis for organisations to design, assemble, and govern networks of specialised agents—embedding autonomy incrementally as technology advances alongside standard mechanisms for oversight and control.

Workflow Orchestration Agents

VIDA, Adapt, Emergent, Accso, Genesis Computing, Telestream

If MCP and A2A provide the basic frameworks for interoperability, orchestration platforms are emerging to help operators construct coherent workflows that make sense. At IBC 2025, suppliers addressed this challenge by emphasising low-code interfaces and governance layers, along with mechanisms ensuring both safety and transparency.

Orchestration platforms are emerging to assemble agents into workflows that make sense.

VIDA introduced *Media Factory*, a cloud-native workflow engine within its Content OS. The UI allows users to link together agents, models, and data sources through a visual, no-code interface. The workflow also reminds users to include safeguards such as upfront data validation, end-point learning, and detailed logging. *Media Factory* includes nearly 300 built-in connectors that support integration with MAM, ERP, rights and other tools. VIDA noted that agentic AI radically changed its own engineering approach - shifting third party integration from bespoke development to a configurable service - lowering barriers to entry for both supplier and customer.

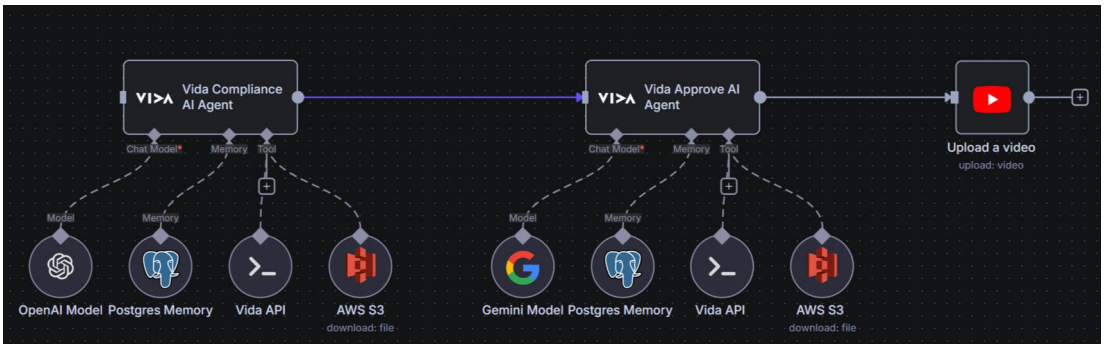

Image:VIDA Media Factory

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AI has radically changed engineering, shifting from bespoke development to configurable services.

Adapt presented *Nuance*, a creative focused orchestration platform that brings together many of the AI tools being used by its customers. Like other solutions, complex workflows are broken down into sets of micro-tasks. These tasks are managed via a middleware that connects via an API to third party AI tools such as **TwelveLabs**, with orchestration ensuring consistency across the chain. As a localisation workflow can involve as many as 24 micro-tasks, *Nuance* simplifies customer adoption of AI - enabling them to save cost as well as to scale faster. Developed for creators, the workflows also ensure that human 'cultural ambassadors' provide quality control.

Emergent, a new company launched this year by former **Polygon Labs** and **Disguise** executives, also presented an AI middleware approach which it similarly argued made it easier to embed AI into customers' existing environments - ensuring secure adoption of agentic toolkits in environments where operational reliability is critical.

Accso, working with **ZDF** and **ARD**, demonstrated a model tailored to public service broadcasting. It is developing a framework that emphasises SLM (small language models) and ML (machine learning) to prioritise transparency, reproducibility, and editorial accountability. By extending a narrow set of trained data objects across planning, scheduling, rights, and distribution, Accso aims to harmonise agentic orchestration with mandates around diversity, education, and cultural breadth, all of which could get lost when using public LLMs (large language models).

Genesis Computing extends the orchestration modelling with a Kanban style project board interface as opposed to a traditional UML model. Agents performing tasks are presented as cards moving through stages towards completion of a goal. Logs for each action can be viewed via the agent card and any errors or issues are flagged on the board. This visualisation addresses one of the sector's persistent concerns: the black box nature of AI. By making agent activity transparent, Genesis Computing helps to promote greater trust and governance via a format known by project managers.

Finally, **Telestream** added AI-workflow capabilities to its *Vantage AI* platform. Using natural language prompts, users can create new ingest, QC, packaging, and delivery pipelines that can incorporate both traditional as well as specialised AI agents for captioning, speech recognition, or compliance. As with all Vantage workflows, metadata generated in one stage feeds downstream actions such as targeted search or automated QC, ensuring that workflows remain adaptive processes.

The value of agentic AI depends not just on individual agents, but on how effectively they can be combined into real world media workflows.

These technologies illustrate that the value of agentic AI lies less in the tasks of individual agents than in how effectively they are orchestrated into real-world media workflows. Further adoption will hinge on trust and transparency: unless there is confidence in how agents are operating, their impact will remain limited.

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Creative Agents

Moments Lab, Quickture, Obvious Future, Six Floor Solutions, Prime Focus Technologies (PFT), FrameDrop, Amagi

Creative applications remain one of the more sensitive areas for agentic AI. With recent industrial action still very much in mind, many in the industry remain wary that automation could undermine labour agreements, dilute content quality, and alienate viewers. As a result, vendors are positioning their tools carefully - not as replacements for creatives, but as accelerators for tedious and time-consuming tasks.

> **Vendors positioned their tools carefully—not as replacements for creative labour, but as accelerators for tedious and time-consuming tasks.**

Moments Lab presented its *Discovery Agent*, an AI-powered tool that helps users find and use appropriate content. Instead of relying on metadata and rigid search filters, users issue natural language prompts for what they are looking for. In the demo at IBC, a high level prompt - “build a story about Elon Musk” - was subsequently broken down by the agent into sub queries looking at different stages of his life and business. Built on the Moments Lab’s *MXT* indexing engine, the system returns short clips or moments, focused exactly on the right scene. *Discovery Agent* is being applied not only in editorial workflows but also within the IBC Accelerator project *AI Agent Assistants for Live Production*, where it was used to automatically retrieve B-roll for rundowns.

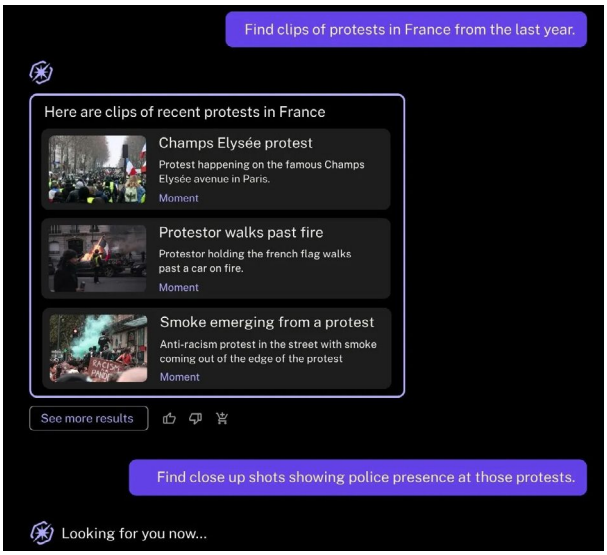

Image: Moments Lab / Discovery Agent

Quickture, another edit-focused agent, combines transcript and video analysis to also suggest B-roll and recommend cuts. It is directly integrated with a variety of NLE platforms including *Avid Media Composer* and *Adobe Premiere*. Recommended clips appear directly on the timeline. Quickture has also recently introduced style-based edits, which it successfully demonstrated during a PoC using

training footage from the *Come Dine with Me* show. By learning from examples, the system can assemble edits that reflect the creative tone of a given programme, accelerating the early stages of post-production.

Obvious Future, with its *CaraOne* product, addresses the AI needs of production companies who are not comfortable working in the cloud. *CaraOne* provides AI services that run entirely on-prem to help producers with content discovery - locating and sequencing materials with integrations to Adobe Premiere and Avid. This enables companies that are highly security conscious to take advantage of AI while maintaining complete control over the transport and storage of their data.

Other companies highlighted downstream applications for publication and distribution. **Six Floor Solutions** is focused on content repurposing, with a platform that detects key moments for automatic clip and highlights generation. Its emphasis is on real-time detection and monetisation through live and on-demand workflows.

> **Hearst reduced thumbnail creation time from 20 minutes to five through agentic workflows.**

With more than 20 specialised agents for segmentation, highlight extraction, compliance, and localisation, **Prime Focus Technologies (PFT)'s** *CLEAR AI* platform is one of the more mature agentic AI ecosystems. In a recent *DPP podcast*, **Hearst Networks EMEA** and PFT discussed how more precise thumbnail generation is being made possible through agentic workflows. This is achieved by agents that scan content, identify characters and emotions, and suggest images for marketing across over 50 VOD platforms to which Hearst delivers content. The tool cut production time from 20 minutes per episode to around five. Weekly user feedback sessions helped adoption by fine-tuning outputs to editorial expectations.

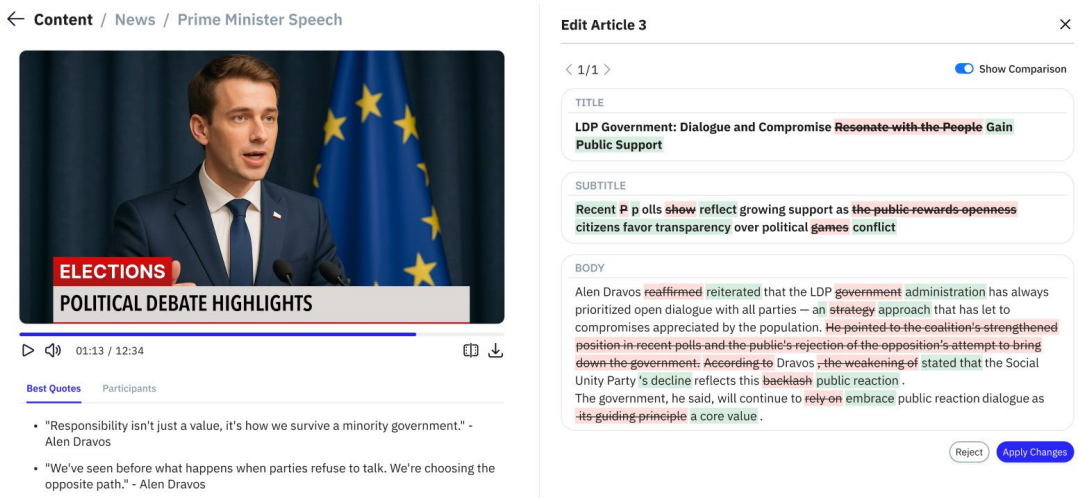

Image: Framedrop

FrameDrop presented a more specialised AI solution for news and fast-turnaround content. Its system ingests live or recorded video, automatically detects highlights using transcripts and visual recognition,

and generates clips in both horizontal and vertical format. A unique selling point of FrameDrop is that it also drafts articles that can be published alongside the clips - creating three story variations per video. This enables journalists to choose the story they prefer, while maintaining the ability to make further revisions or reiterations through the AI process.

Finally, **Amagi** previewed its *NewsPulse* service, scheduled for release later in 2025. This agentic AI system monitors live news feeds, identifies relevant stories based on editorial policies, and can automatically trigger story composition and publication pipelines. A New York based local news station, for example, could focus on the five boroughs, or highlight Yankees updates. With configurable guardrails for style and editorial guidance, NewsPulse is designed to assist smaller newsrooms in accelerating output while maintaining sufficient oversight to ensure that editorial norms are respected.

Across these examples, creative agents were consistently positioned as support tools. Their purpose is to alleviate bottlenecks in speed and scale, rather than to replace editorial judgement.

Live Production Agents

IBC Accelerator: AI Assistant Agents for Live Production, Cuez, Moments Lab, EVS, Highfield AI, nxtedition

Live production presents perhaps the most demanding environment for agentic AI. Unlike editing or repurposing, where human oversight can be applied at leisure, live workflows operate under severe time pressure. Decisions must be made in seconds, often with little or no opportunity for correction. This makes live production a natural use case for agents, but one where reliability, governance, and trust are critical.

> **Live production a natural testing ground for agents, but also one where reliability, governance, and trust become critical.**

The **IBC 2025 Accelerator: AI Agent Assistants for Live Production** illustrated how these pressures are shaping the development of live production agents. Led by broadcasters **ITN**, **BBC**, and **Channel 4**, and supported by vendors including **Cuez**, **EVS**, **Moments Lab**, and **Highfield AI**, who contributed to this report, the project embedded AI agents directly into control room operations. Agents were tasked with interpreting run orders, anticipating operational issues, and issuing commands to production systems based on natural language prompts. By shifting from traditional user interfaces to voice-driven commands, the project demonstrated how agents could reduce cognitive load on producers and increase reaction speed in multi-platform environments.

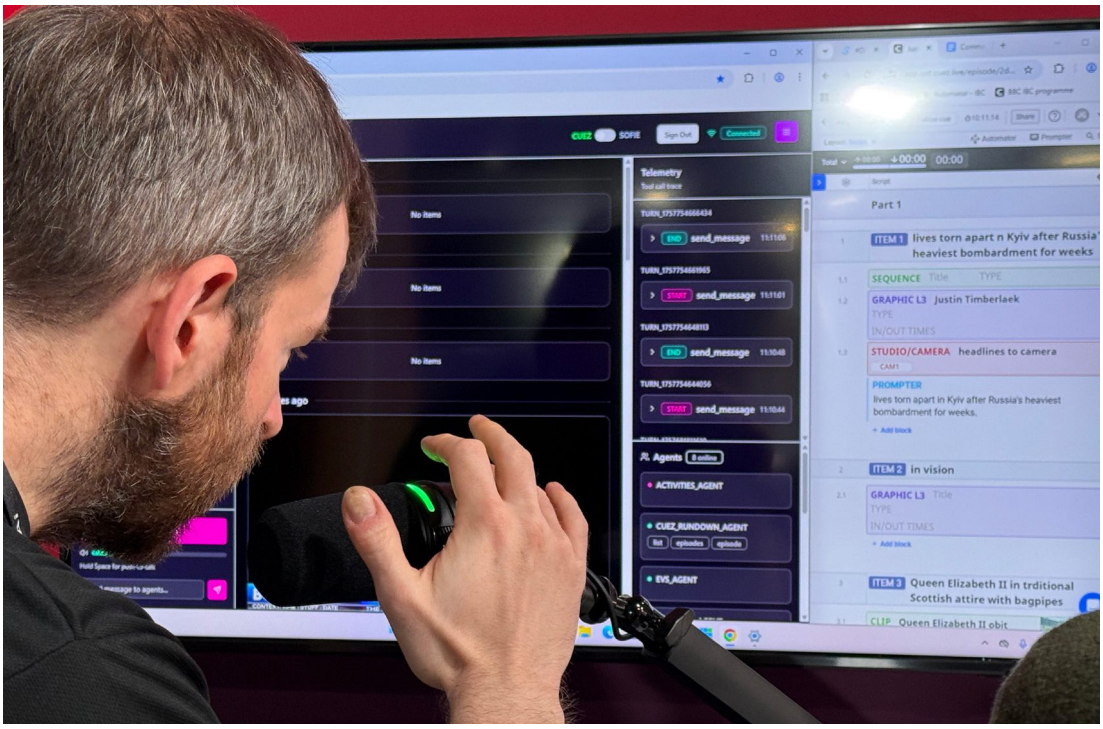

Photo: James Dade/ AI Agent Assistants for Live Production

Cuez played a central role, providing the MCP and A2A orchestration layers through its run down platform. **Moments Lab's** *Discovery Agent* supplied B-roll for live rundowns, while **EVS** contributed compliance tools for automated face blurring of B-roll footage. **Highfield AI** focused on graphics, via its *Pulse* tool to generate contextual on-screen graphics (lower thirds, stats, visuals) from either unscripted speech or producer prompts.

> **The Live Production project demonstrated how agents could reduce cognitive load on producers and increase reaction speed in multi-platform environments.**

On its stand in Hall 7, **nxtedition** also highlighted a newsroom approach, embedding agents and AI commands into its production platform. Drawing on open-source models, nxtedition deployed agents to support script adaptation, fact-checking, and social media versioning.

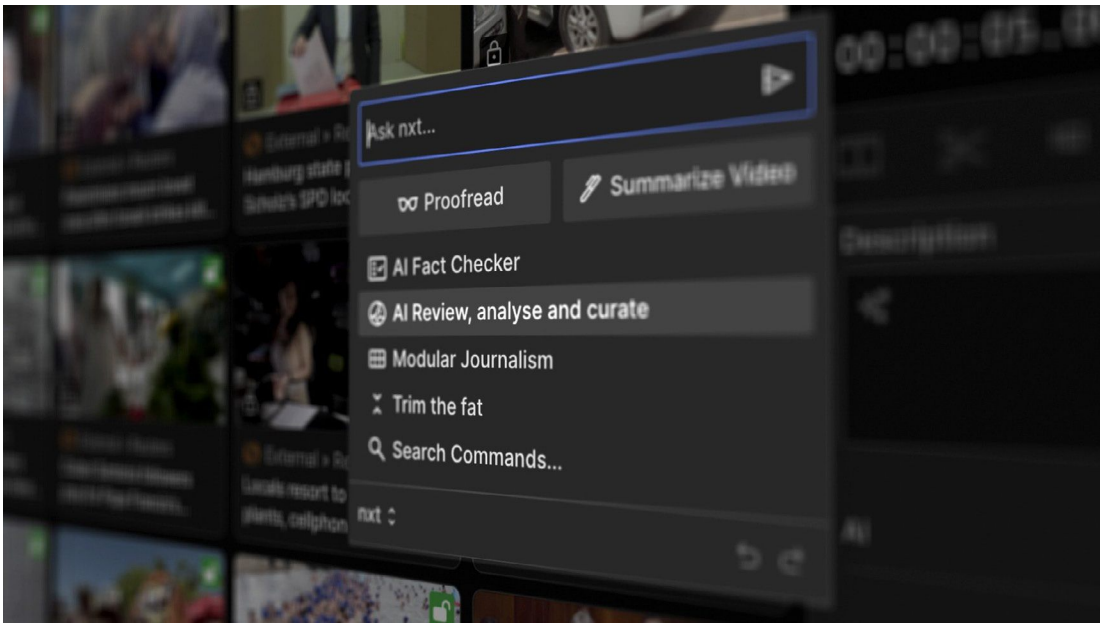

Image: nxtedition

With live production, the focus has been very much on the practical augmentation of existing workflows rather than generating novel outputs. Live production agents are being developed to interpret, adapt, and react in real time, shouldering time-sensitive tasks so that producers can focus on editorial priorities.

Human Interfaces

Dalet, IBC Accelerator - AI Agent Assistants for Live Production

One of the most noticeable impacts of agentic AI is on human–machine interaction. Traditional interfaces built around complex dashboards, layered menus, and manual sequencing are being replaced with conversational exchanges. Users can now state objectives such as “build a highlights package,” “localise this segment,” or “prepare graphics for live”, and delegate execution to agents that understand intent, orchestrate tasks, and report back.

> **The effect is not just reduced complexity, but a redefinition of the interface itself: from a control surface to a collaborative space.**

The effect is not just reduced complexity, but a redefinition of the interface itself: from a control surface to a collaborative space. This shift not only reduces complexity and accelerates workflows by reducing button pressing, but also redefines the concept of the user interface itself: from a control surface to a collaborative space.

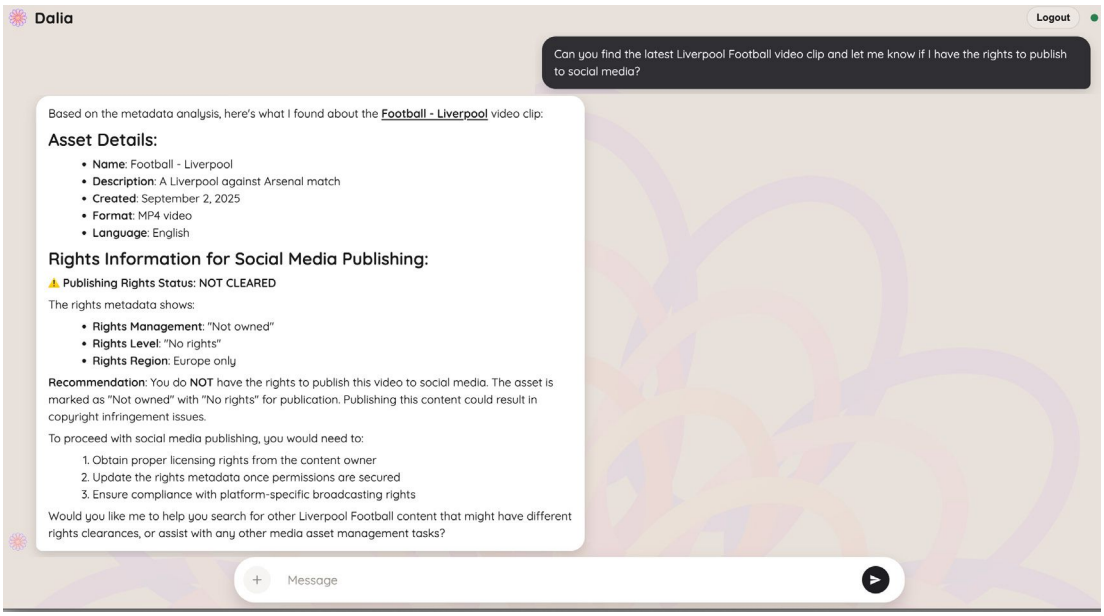

Image: Dalet

At IBC 2025, **Dalet** showcased this shift with the launch of *Dalia*, an agentic AI layer that spans and unifies its entire product suite. Rather than navigating multiple dashboards, users can interact with Dalia through natural language to search, clip, transcode, package, and distribute by prompting what they want to achieve. It can also perform operations that once required engagement with multiple systems—such as scheduling ingest, organising content by rights status, or triggering review workflows. This can now be completed through a single conversational interface. Developed in a startup-style lab within Dalet, *Dalia* reflects a consumer demand for more simple ways of engaging with enterprise level technology.

> **Tasks that once required multiple systems can now be completed through a single conversational interface.**

As we saw in the above section, the **IBC Accelerator: AI Agent Assistants in Live Production** removed typing altogether by enabling voice-only control, with agents responding directly to spoken instructions in live production environments. This reflects a growing demand in control rooms to move beyond graphical user interfaces entirely, particularly where time pressure makes traditional UIs an issue..

> **Interfaces are becoming lighter, more adaptive, and more conversational, with agents translating intent into action.**

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Building Character

AWS, Microsoft, UIC Digital, Largo.ai, DubHub

As Open AI learned on the *release of GPT 5*, users form emotional attachments to chatbots. A number of demonstrations at IBC 2025 focused on avatars and character agents, illustrating how agentic AI is moving beyond task automation into areas of performance, personality, and interaction. These systems blur the line between tools and characters, and raise new questions about how audiences will engage with AI.

At its stand in Hall 5, **AWS** presented a holographic digital double of Ruth Buscombe, a **Formula 1 TV** presenter and race strategist, who conversed naturally with attendees to provide recommendations on what to see at IBC. By combining *Amazon Transcribe* for real-time speech recognition with *AWS Bedrock* models for generative responses, the system produced synchronised audiovisual outputs using voice cloning and animation. Although a technical novelty, the demonstration highlighted how avatars can be used in customer engagement, interactive storytelling, and always-on assistance—applications that demand both consistency and personality.

Photo: James Dade / AWS

> **AI avatars acted as host and analyst commentators for a football match.**

Microsoft and **UIC Digital** demonstrated their *Live Video Intelligence* initiative using AI avatars as hosts and analysts for live sports. The avatars, modelled on real personalities such as in the AWS

example, provided commentary informed by both the live match feeds as well as instructions from the producer. While visually striking, the core innovation lay in the underlying metadata pipeline. *Live Video Intelligence* generated real-time content insight driving multiple simultaneous outputs, including automated summaries, highlight clipping for social media, instant website updates, and editorial analysis streams.

Largo.ai extended this theme into creative and character development. Its version 3 platform introduced tools for deeper character analysis, enriched casting propositions, and conversational interaction with fictional personas. Producers and writers could 'chat' with characters during story development to test narrative consistency and ensure that they would react as expected. Datasets of scripts, performances, actors, and audience feedback also enabled the system to make casting recommendations on who might do well inhabiting these characters. This suggests how agents can help creators better refine character traits and relationships.

> **Producers and writers could 'chat' with characters during story development.**

Dubhub addressed character through the lens of localisation. Its *Evocion* technology seeks to retain emotional nuance in dubbed performances, using AI to understand the characters in a script. It treats dubbing more like casting than transcription. The end product is an AI dub which can assign tone, style, and mood to each line of dialogue.

Agents with character are beginning to play a role in media workflows. Embodied as avatars, applied to story development, or used to enhance localisation, they signal how agentic AI is moving beyond operational efficiency and engaging in more human ways.

Monetisation & Engagement Agents

Kaltura, WideOrbit, Accedo, Merapar

If creative and production agents focus on efficiency, a parallel thread at IBC 2025 explored how agents can also be used to drive increased revenue and audience engagement. These applications extend beyond automation into areas such as targeted advertising, personalised recommendations, and more interactive viewer experiences.

> **Agents are being used to drive increased revenue and audience engagement.**

Kaltura unveiled its *Media Publishing Agent*, which it positioned as an accelerator for audience reach. The agent can review content, generate metadata, produce promotional material, and publish assets automatically across multiple platforms. Kaltura also demoed its *Smart Ads* solution which can generate and act upon contextual data in both pre-recorded content and live video feeds. Demos showed how

this could be used to automatically overlay non-intrusive ads based on contextual analysis ranging from age of cast members, to beverages, and even bow ties.

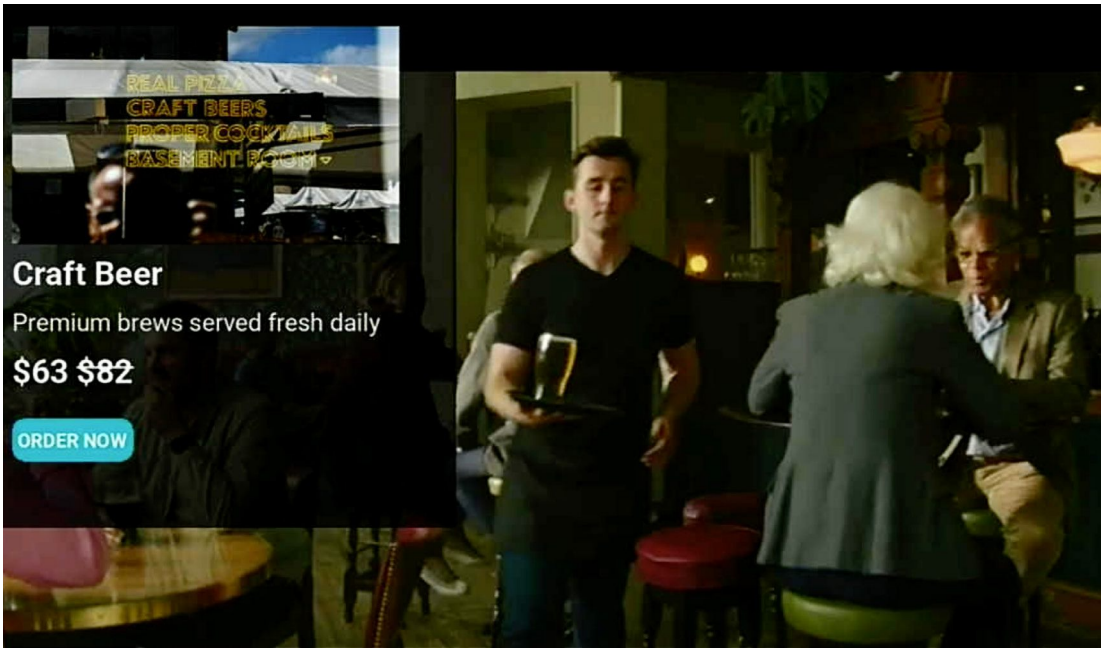

Image: Kaltura

WideOrbit highlighted two new agents: *Makegood AI* and *Campaigns AI*. *Makegood AI* automates inventory replacement when ads cannot be delivered as planned. The agent is particularly helpful when ad revenues can often be less than the cost of human effort for reconciliation. *Campaigns AI* assists with the administration of setting up campaigns for planning and optimising buying across digital and linear channels. It's designed to ease workloads in an area in which sales teams reportedly spend as much as 70% of their time on administration. Both agents can operate autonomously or in co-pilot mode, reflecting a broader trend of balancing automation with human oversight, based on financial returns.

> **Sales teams can spend up to 70% of their time on administration.**

Accedo, working with **Merapar**, demonstrated *Accedo Compose*, a platform that utilises modular AI agents to optimise viewer engagement across multiple touchpoints. The system monitors behaviour in real time and can adjust interfaces, recommendations, and even technical delivery to reduce churn and improve streaming quality. At IBC 2025, demonstrations showed agents suggesting actions such as targeted email campaigns — interventions that could either be executed autonomously or held for human approval.

Agentic AI is beginning to reshape not only how media companies monetise content, but how they manage their relationship with audiences. By combining contextual intelligence, dynamic orchestration, and real-time decision-making, these systems move beyond back-end optimisation to influence the points where viewership and revenue converge.

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What also caught our Eye: AI Optimisation

Wagada Digital

Although not strictly agentic AI, an adjacent trend at IBC 2025 was the rise of *Answer Engine Optimisation* (AEO) services. As more users and technologies turn to AI chatbots —so-called answer engines — website traffic patterns are beginning to shift. Gartner has predicted that search engine volume will decrease by 25% by 2026.

> **Gartner has predicted that search engine volume will decrease by 25% by 2026.**

This reflects a broader behavioural change. Users increasingly interact with AI systems to obtain direct answers and will only visit websites when seeking further detail. In the context of agentic AI, where agents themselves are conducting online research, this dynamic becomes even more pronounced.

> **Authoritative content, clear statistics, and visible trust signals are becoming essential to ensure visibility in AI-driven results.**

Agencies such as **Wagada Digital** are now working with customers to ensure that their data doesn't get lost in the transition. Authoritative content, clear statistics, and visible trust signals such as customer reviews are becoming essential to ensure visibility in AI-driven results. Conversely, paywalled content risks exclusion from both training datasets and retrieval pipelines. Industry terminology for these emerging practices varies—AEO, AI Optimisation (AIO), or Generative Engine Optimisation (GEO)—but the underlying principle is the same: adapting content strategies for an era where AI agents, not humans, are the first point of contact.

Conclusion

At IBC 2025, Agentic AI reflected a media and entertainment sector feeling its way forward. Customers remain cautious. Interest in the practical business value of Agentic AI is tempered by concerns around its governance, integration, and impact on human resources. For vendors, this means that progress will depend on securing a broader base of customers willing to co-develop use cases and move beyond pilots.

> **Agentic AI at IBC 2025 reflected a sector feeling its way forward.**

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Demonstrations on the show floor underscored how important this collaboration is. Vendors who have developed solutions together with customers have more advanced products. While many of these are not sexy, they show the strength of AI agents to perform the work that takes the longest, costs the most, and is the most tedious to do. The focus however is very much on co-pilot modes, guardrails, and audit trails rather than autonomy. Agentic AI - at least for the moment - still demands humans.

> **Customers are cautious—focused on governance and integration rather than raw capability.**

Nevertheless, patterns are beginning to emerge. Agent creation platforms are converging on microservice-like architectures, orchestration is being reframed as middleware, and governance is shifting from optional to mandatory. At the same time, creative and live production workflows are revealing where agents can deliver immediate value via speed, scale, and consistency.

> **Agentic AI is unlikely to arrive as a single disruptive moment—it will diffuse gradually, embedding itself into existing systems.**

At present, agentic AI is unlikely to arrive as a single disruptive moment. Instead, as the technology develops, it will diffuse gradually, embedding itself into existing systems and processes.

The DPP has assigned Agentic AI a maturity score of 2

Agentic AI is still feeling its way forward. There is considerable innovation, and some initial implementations. But customer interest in the practical business value of Agentic AI is tempered by concerns around its governance, integration, and impact on human resources. Vendors are mostly focused on co-pilot modes, guardrails, and audit trails rather than genuine autonomy. Progress will depend on more customers willing to work with vendors to co-develop use cases and move beyond pilots.

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2 AV Broadcast

Adoption of broadcast-grade tools is accelerating across corporates, education, worship, and live events. While there are many strong examples of vendors working effectively with AV users, too often customers still report being talked down to or expected to “do things the BBC way”. Vendors are on a steep learning curve, caught between the expectations of sophistication and simplicity. Most deployments are still shaped by SIs and consultants, with AV users increasingly calling for more direct engagement with technology vendors.

DPP Assessment

Nascent **Fully mature**

1	2	**3**	4	5

Photo: James Dade

Foreword

Paul Harding
Solutions Architect
Diversified

In a world increasingly shaped by software and guided by algorithms, the gap between industry capability and customer expectation has never been more apparent. The DPP's *Demand vs. Supply* report offers an important lens on where we stand and where we still have work to do as media and workplace technologies converge.

The technical and creative expectations once reserved for broadcast studios are now being placed on corporate boardrooms, team rooms, and hybrid event spaces. Engagement challenges once remedied by thoughtful meeting and event planning have scaled to become production challenges, especially in today's hybrid work environment.

> **Traditional categories are blurring: workplace AV, media production, and IT are no longer distinct domains.**

Traditional categories are blurring. Workplace AV, media production, and IT infrastructure are no longer distinct domains. We're witnessing a shift from hardware-centric models to software-defined ecosystems, platforms built on elastic compute, API-first architecture, and real-time adaptability. This evolution requires new ways of thinking, building, and collaborating.

AI is accelerating this transition. While it may not be in the spotlight, it's already reshaping creative and technical workflows, from audio mixing and colour correction to intelligent automation and experience personalisation. It's not about replacing people, but about augmenting teams with tools that enable faster, more flexible responses to complex demands.

The takeaway from this report is not just that demand is outpacing supply, but also that expectations are evolving faster than many systems and workflows were designed to handle. That's a shared challenge across our industry. The organisations that will lead the way will embrace the adoption and evolution of broadcast and media technology across industries along with their technology partners who create the innovative, software-based solutions of the future.

If this report prompts more honest conversations about how we align capabilities with needs, and how we build more responsive, intelligent environments together, then we're headed in the right direction.

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> **ProAV is now around 70% of our business. Arguably, InfoComm and ISE are now more valuable shows for us than NAB or IBC.**
>
> *Vendor quoted in DPP Demand vs Supply - NAB 2025*

Topic Summary

- AV Broadcast has emerged as one of the fastest-growing areas of ProAV, driven by demand for more in-house content production across corporates, education, worship, and live events
- Companies want top quality, broadcast-grade technology made simple, accessible, and aligned with non-studio practices
- The channel remains powerful: systems integrators and consultants shape most purchasing decisions, though end users want more direct engagement with vendors
- Direct-to-audience strategies are spreading beyond broadcasters, with major events now bypassing traditional partners to reach record audiences through their own channels

Photo: James Dade/Nexus AV

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New Verticals

These remain challenging times for the media and entertainment industry. Digital distribution has expanded the potential reach for content but also fragmented audiences and advertisers. The result is that revenues are down, and competition for attention is more intense than ever before.

Yet digital platforms, combined with lower-cost, easier-to-use production tools, have also opened the door to new entrants. Content creation has been democratised, enabling a far wider range of organisations to deliver professional-quality video to audiences that traditional broadcasters often overlooked.

> **Content creation has been democratised, enabling a far wider range of organisations to deliver professional-quality video.**

At *IBC 2024* we wrote about the creator economy and the technologies being developed to support it. In parallel, another sector has been growing rapidly: Professional AV. Many contributors to our NAB 2025 report - including producers, broadcasters and vendors - expressed curiosity to learn more about this adjacent space.. But many of them reported that they found the ProAV market very difficult to break into.

> **Many reported that they found the ProAV market very difficult to break into.**

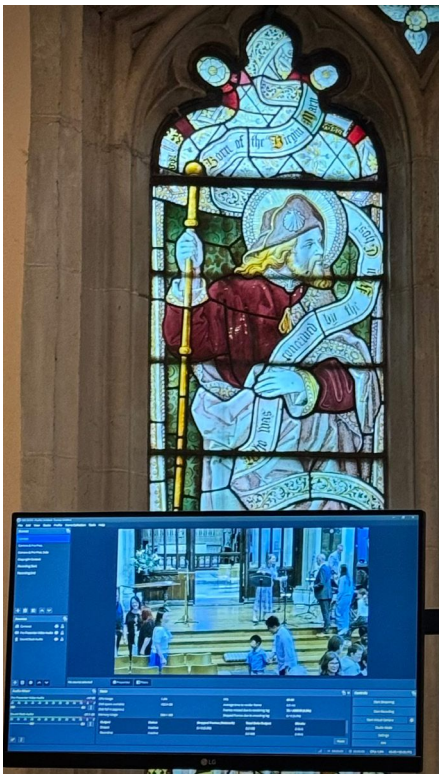

Photo: James Dade

ProAV, as its very name indicates, is indeed a vast, highly diverse, and challenging area. It encompasses all those who work with audio and visual technology in professional contexts. They distinguish themselves, rightly or wrongly, from 'creators,' who they perceive to operate less formally.

At our customer workshop on ProAV for this report, Mark Risby from Digibox shared a diagram he created for his team to visualise the ProAV market within the wider content production and distribution space.

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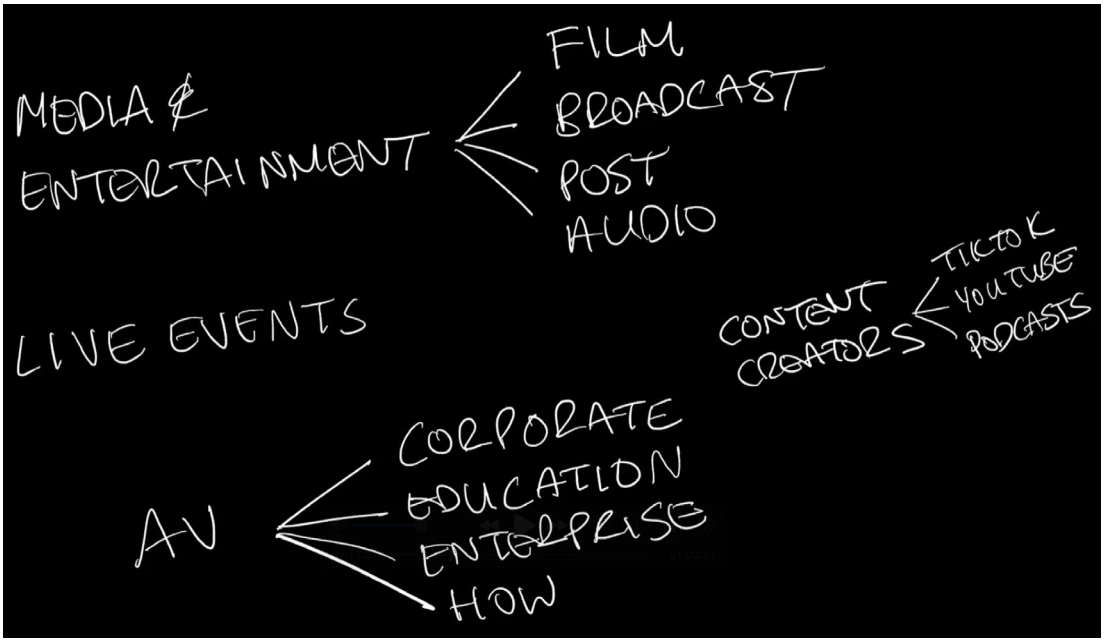

Image: Marc Risby/Digibox

While highly reductive and certainly not definitive, this representation divides the ProAV market into four core verticals:

- **Corporate** – from Fortune 500s and banks to small businesses
- **Education** – from schools to universities to independent trainers
- **Enterprise** – from stadia to governments, professional sports, and transport
- **Houses of Worship (HOW)** – from mega-churches to small community congregations

Live Events is presented in the middle as it plays a huge role in all three spaces of M&E, ProAV, and the Creator Economy. It comes down to who is producing the live event, and who the intended audience is.

> **Live video plays a huge role for M&E, ProAV, and Content Creators.**

Beyond these verticals, ProAV encompasses a broad range of technology interests and specialisms - including audio, digital signage, staging and lights, control systems, smart home and building, unified communications (UC) or conferencing and collaboration tools, and AV Broadcast.

AV Broadcast

While ProAV and M&E use many of the same technologies, the main point of convergence is what some call AV Broadcast and others call Broadcast AV. This refers to the technology space for content production and distribution, including content creation and management, IP distribution, streaming, AR/VR/XR, and image processing. The emphasis of the terminology may be contested, but the principle is simple: professional, broadcast-quality tools and workflows are being adopted by ProAV users.

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AV Broadcast has now become the second-largest technology market within ProAV.

According to AVIXA, AV Broadcast has now become the second-largest technology market within ProAV, behind only Conferencing and Collaboration (UC). Its growth is being driven by the rising demand from corporates for professional-grade content — from Apple-style product launches to livestreamed town halls.

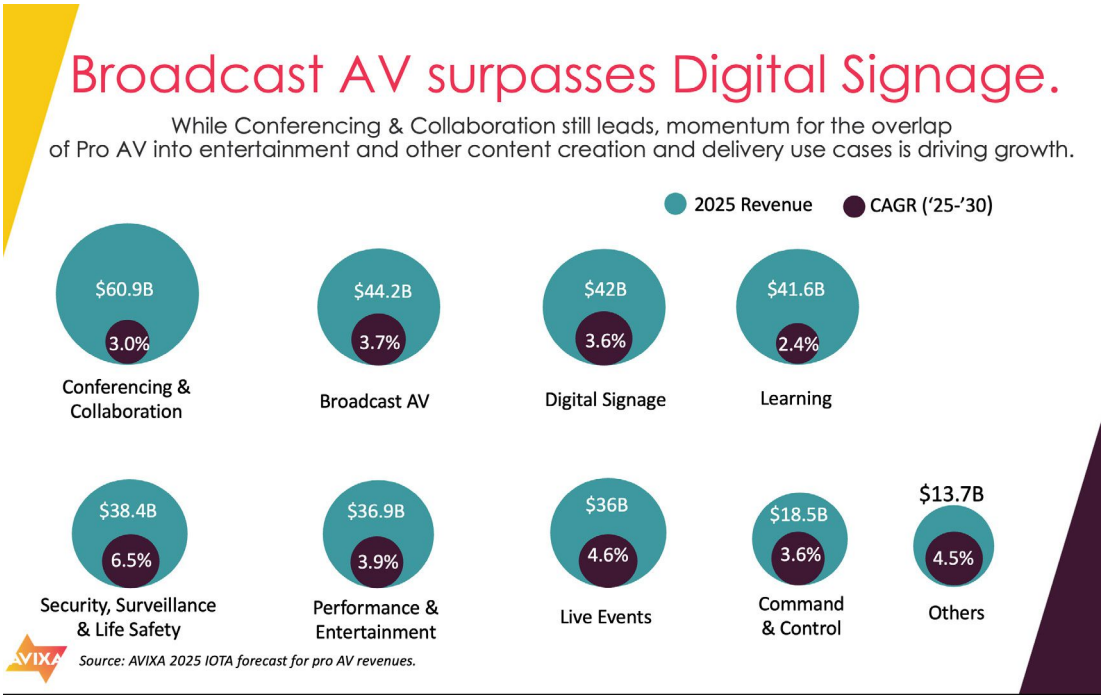

Image: Sean Wargo/Avixa

Three forces have been especially important factors in promoting this growth:

1. **Digital distribution.** Organisations can now reach audiences directly through their own platforms, without relying on traditional broadcasters. Audiences are increasingly savvy, so production values must be high to maintain credibility.

2. **The Covid-19 pandemic.** Remote working forced companies to improve communication at scale with employees, shareholders, and investors. Many accelerated their investment in AV infrastructure to support this shift, and the momentum has continued post-pandemic.

3. **Prosumer Technology.** The growth of easy to use production technology has empowered not only creators. It has also enabled companies to produce their own professional looking content in-house.

The global AV industry is expected to grow to $420 billion by 2028

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As a result, according to *AVIXA's Industry Outlook and Trends Analysis*, the global AV industry is forecast to grow from $307 billion in 2023 to $402 billion by 2028. Much of that expansion will come from AV Broadcast use cases.

Different Backgrounds

One striking feature of ProAV is that most practitioners do not come from traditional broadcast or production backgrounds. In her book, *Your Dream Job in AudioVisual*, Denise Hughes refers to this phenomenon as 'falling into' the industry. The ProAV User Group estimates that around 75% of those working in ProAV arrived through necessity, having been tasked with AV alongside other responsibilities. These users come from a variety of backgrounds from IT to sales and marketing.

> **ProAV practitioners often 'fall into' the industry — 75% arrive through necessity, not design.**

Photo: James Dade

For ProAV users and their companies, the emphasis is on outcomes, not processes. Technology must be intuitive to operate, reliable, and able to deliver broadcast quality production. Live productions are often run by a small team of operators - even if they are large, multi-camera, events. While training programmes such as AVIXA's CTS exist, many AV practitioners report that they lack the time to invest heavily in them - and these tend to be more hardware and technology focused.

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> **"I don't care how it was used by the BBC."**

The implications for vendors are clear. ProAV buyers will not adopt complex technologies designed for teams of trained broadcast engineers. As one ProAV user contributor put it - "I don't care how it was used by the BBC".

Integrators and Consultants

In ProAV, the channel rules. Systems Integrators (SIs) and consultants who sell or recommend technology remain central. While their role may have diminished recently in M&E, in ProAV, these intermediaries are far more influential. AV users typically learn about new technology through integrators and consultants, not directly from manufacturers.

> **In ProAV, systems integrators and consultants are customers.**

This poses a challenge for vendors used to selling direct. Relationships must be built with distributors and SIs. Bypassing the channel and going directly to end users risks alienating both. As one SI told us: "In ProAV, we are the customers."

There are, however, some signs of change. AV users want more direct communications with technology companies. ISE has reported a massive uptick of end user attendance at their show representing nearly 30% of all attendees in 2024 and 2025 - with nearly 60% of these visitors in 2024 being first time visitors. Industry organisations such as the **AV User Group** and **Rise AV** have emerged to give end users a stronger voice. At IBC, initiatives such as speed pitching sessions now provide a rare opportunity for technology companies to engage directly with AV practitioners.

> **At IBC, speed pitching sessions provide a rare opportunity for technology companies to engage directly with AV practitioners.**

Hardware Rules

The dominance of the channel also helps explain why hardware continues to dominate ProAV. Integrators can build margin around physical devices in ways that are harder with cloud services. As one SI contributor put it: "*we can't make money off cloud.*"

> **"We can't make money off cloud."**

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Another factor that has reinforced this hardware bias is budgeting models. Many ProAV buyers prefer CAPEX and one-off spends, rather than the ongoing OPEX commitments associated with cloud. There are a couple of reasons for this. Budgets for purchasing AV technology tend to come from multiple departments within an organisation, and OPEX commitments are harder to share across departments such as IT, Marketing, and Sales. A second factor is that AV budgets tend to get allocated at the very last minute and often late in the budget cycle. There can be a scramble to spend funds.

Photo: James Dade

There are a couple of use cases where cloud has found a role in ProAV. The first is in global, remote monitoring and management of hardware. The second is in the meeting and collaboration space. But despite this, ProAV remains largely on-premise and hardware-led.

Telling a Story

Measures of success in ProAV differ from those in M&E. While broadcasters may be concerned with viewers or advertising revenues, corporations evaluate outcomes such as retail sales, brand perception, or employee engagement. That said, demonstrable ROI is just as important in the AV space as any other.

> **Measures of success in ProAV differ: outcomes such as brand perception or employee engagement can matter more.**

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One issue raised by a number of AV users in achieving success was storytelling. Although there has been an emphasis on buying the best technology, many organisations lack the creative expertise to use it. One multinational purchased 30 high-end cameras for a CEO launch event — but without creative direction, the investment fell flat.

There is a real interest in the ProAV community for help in crafting more powerful narratives - ones that enable better storytelling, whether for shareholders, congregations, students, or fans. This is an area in which surely M&E professionals can provide some guidance.

> **Without creative expertise, technology investments can fall flat.**

Broadcast Adjacent

Vendors at both NAB and IBC in 2025 expressed strong interest in the professional AV market. The motivation is clear: while the media and entertainment sector remains under pressure, content production is growing across corporates, brands, houses of worship, governments, and education. For suppliers, this represents a new pool of customers seeking high quality broadcast technology.

> **ProAV users lack familiarity with traditional broadcast brands and have little loyalty to them.**

Connecting with this audience, however, has not been straightforward for many companies. ProAV users lack familiarity with traditional broadcast brands and have little loyalty to them. And, while they have high expectations for quality, they are quick to disengage if solutions appear too complex or sales people condescending. This was evident during IBC's speed pitching sessions, organised with the **ProAV User Group**, where vendors presented directly to AV practitioners. While some pitches resonated, others were criticised for talking down to the audience or failing to explain how the technology could be applied in everyday AV contexts.

> **AV Users are quick to disengage if solutions appear too complex or sales people condescending.**

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Photo: James Dade

The proliferation of terminology for the market itself illustrates the challenge of positioning: 'AV Broadcast', emphasising users; 'Broadcast AV', highlighting technology; 'Enterprise Broadcast' describing high-end use cases. There is also 'Broadcast Adjacent' — acknowledging that while the markets are distinct, they are converging around different contexts.

For this report, we use the term AV Broadcast, as it focuses on the needs of AV users and reflects the Demand vs Supply lens. The opportunity is real, but success requires a bridging of expectations: broadcast-grade outputs delivered with AV user needs in mind.

Live Production

Grass Valley, Vizrt, QuickLink, Marshall Electronics, Ross Video, EVS, Cuez, nxtedition, Emergent, Service Now, Diversified

Live production has emerged as one of the fastest-growing areas in the AV Broadcast market. AV users from corporations and education providers to houses of worship expect polished production values, while mainly operating with smaller, less specialised crews. This has forced vendors to rethink user experience, simplify interfaces, and design professional systems that can be used outside traditional broadcast studios.

At IBC 2025, **Grass Valley** carved out a dedicated space for 'enterprise broadcast', signalling a sharper focus on the ProAV market. While the underlying technologies were familiar—anchored by its *AMPP* production platform—the company demonstrated how the technology could be reframed for enterprise users. Demonstrations showed on-premise configurations—appealing to customers who prefer local deployments —and streamlined contributor panels designed for non-specialist users.

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Image: Grass Valley/Customised AMPP Control Panel

This aligns with a broader shift in Grass Valley's strategy: adapting its broadcast-grade reliability for enterprise realities - emphasising interoperability with meeting platforms such as **Zoom** and **Teams**, intuitive interfaces, and flexible deployment models.

Vizrt has taken a complementary route through its **NewTek** heritage. *TriCaster* and *NDI* have long been staples of *enterprise* production, and the company continues to evolve these for more specific use cases. At IBC 2025, Vizrt showed integrations with *Tricaster* and *Zoom* enabling enterprise customers to elevate meeting room broadcasts with multi camera support and enhanced AR/XR capabilities for both green screen and natural backgrounds. The company also showcased expanded *Flowics* capabilities including support for larger video walls, alongside simplified interfaces for graphics control, thereby lowering the barriers to entry.

Long known for its remote contribution software, **Quicklink** began developing its *StudioPro* platform in response to its enterprise, education, and government users' needs during the pandemic. Built without the technical baggage of legacy systems, *StudioPro* integrates multi-camera, remote guest, and 4K streaming into a single interface, aiming squarely at operators without traditional broadcast training. This reflects a broader AV trend: not just repurposing broadcast tools but launching new live production systems for the UC market with tight integrations into platforms such as *Zoom*, *Teams*, and **WhatsApp**.

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PTZ cameras were everywhere at IBC, having become a major catalyst for AV users bringing production in-house. Although they have been around since the 1990s, the cameras are now central to ProAV live production, enabling small teams to produce dynamic, multi-camera coverage without additional staff. Vendors reported that PTZ cameras can now ”hardly be kept on the shelf”. **Marshall Electronics** highlighted its own AI-enabled PTZ range, which includes features such as auto-tracking, intelligent framing, and the ability to respect safe zones or keep sponsor logos consistently in frame.

Control systems are also evolving for the AV Broadcast market. Hardware panels are relying on more intelligent software for easier configurability and use.

Image: James Dade / Marshall Electronics

Photo: James Dade / Ross Video

Ross Video's free *DashBoard* software offers a customizable control and monitoring platform that centralises control across a wide range of protocols (RossTalk, HTTP/S, UDP/TCP, etc.). It integrates with Ross's *openGear* ecosystem, and enables the creation of custom panels. This means smaller teams can build efficient, reliable controls without deep broadcast expertise. It also enables teams to use a single hardware control panel for a variety of different applications.

Similarly, **EVS** introduced *Tactiq*, its new modular, software-defined control room interface that functions as a front end for its Flexible Control Room (FCR) solution. By decoupling the user interface

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from backend hardware, *Tactiq* allows any operator station—touchscreen or physical controller—to take on multiple roles (video, audio, graphics, lighting), rather than being locked into a fixed function. It also includes semi-automation for routine tasks, unified workflows in a single touch, and support for reassigning roles on the fly, useful when small teams need to be nimble.

Many AV Users expressed the concern that while they had spent a fortune on AV equipment, they were still struggling with storytelling. Vendors including **Cuez** and **nxtedition** are addressing the storytelling gap with simplified and AI assisted platforms that help non-broadcast teams structure rundowns and integrate live graphics so that they can stage corporate updates with greater narrative impact. **Emergent**, meanwhile, is experimenting with how AI can help simplify AR/VR workflows that bring immersive production into reach for enterprise events, sports, and education.

> **It could be a really boring email or 60 or 90 minute Zoom call, but we do it as an event. It's almost like a nightclub show.**

Service Now, presenting on the stage at Hall 8, told how they are working with **Diversified** to transform themselves to be able toproduce more compelling content. They now stage their quarterly executive updates as live experiences. According to Dan Mills, Senior Coordinating Producer at Service Now, "It could be a really boring email or 60 or 90 minute Zoom call, but we do it as an event. It's almost like a nightclub show. We have a music act, special guests, and comedy. People look forward to it."

These developments illustrate a clear reorientation. Vendors are no longer treating ProAV as a secondary market but as a primary driver of product development. The challenge is not whether the technology can achieve broadcast standards—it can—but whether it can do so in forms that align with AV user practices, budgets, and expectations

Hyper Convergence

Ross Video, Netgear, MMG, Plexus AV, Sencore

One of the most persistent frustrations voiced by ProAV users is the sheer volume and inconsistency of hardware they are forced to manage. Equipment racks are filled with devices of varying sizes that don't stack neatly, while the logistics of transporting kit between venues remains a constant burden. The challenge is compounded by the prevalence of multiple, often incompatible and proprietary IP video standards, leaving production rooms cluttered with converters and adapters. In response, the industry is turning to hyper-converged solutions: platforms that consolidate routing, processing, and switching functions into single, format-agnostic systems.

> **ProAV users are frustrated by the volume and inconsistency of hardware they are forced to manage.**

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Ross Video's *Ultrix* platform is one of the clearest examples of this trend. By collapsing routers, switchers, multiviewers, and processors into a modular chassis, *Ultrix* allows organisations to scale broadcast-grade performance without building complex racks of discrete hardware. Features can be enabled through the purchase of a combination of hardware cards and software licenses, aligning costs more closely with actual usage. For enterprise users, this approach reduces not only technical complexity but also the physical footprint, power draw, and cooling requirements.

Networking infrastructure is also undergoing its own form of convergence, with a software defined approach to meet enterprise AV-over-IP live video workflows. **Netgear's** *AV-Line* switches are engineered for compatibility with multicast video, PoE, fiber uplinks, and high port density, helping AV integrators deploy large-scale, latency-sensitive AV systems out of the box. Configuration is also simplified by *NETGEAR IGMP Plus* for complex multicast configurations and the *Engage Controller UI* that makes switch setup and management more accessible to non-technical users.

New entrants are also reshaping expectations. The *MMG Axis* unit,designed by the live events specialist company, **MMG**, was demoed at the Netgear stand. It bridges SDI and IP video workflows within a compact 4RU chassis. Integration with **vMix**, **OBS**, **NDI Tools**, and **Vizrt** *TriCaster* mean that it can also be used for a variety of multi-camera, hybrid events - again with an interface that eases deployment for less technical teams.

Photo: James Dade / Plexus AV

Plexus AV, backed by **Sencore**, is championing IPMX as a future-proof alternative to proprietary AV-over-IP protocols. ProAV users expressed interest in the opportunities provided by IPMX to standardise their IP infrastructure and enable better future planning - despite resistance from some of their SIs. By handling multiformat conversion in the background, Plexus AV enables users to experiment with open standards such as IPMX without committing to disruptive all-or-nothing transitions.

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Hyper convergence is less about a single product than a broader shift in design philosophy.

Hyper convergence is less about a single product than a broader shift in design philosophy. ProAV users need systems that integrate seamlessly, scale flexibly, and reduce complexity at every stage. Vendors are looking to turn fragmented racks into unified, software-defined platforms .

Content Management

Projective, Backlight, Limecraft, MASV

Content management has become the single largest area of investment in the AV Broadcast market, accounting for 51% of spend according to **AVIXA**.

Broadcast AV is built on content management systems

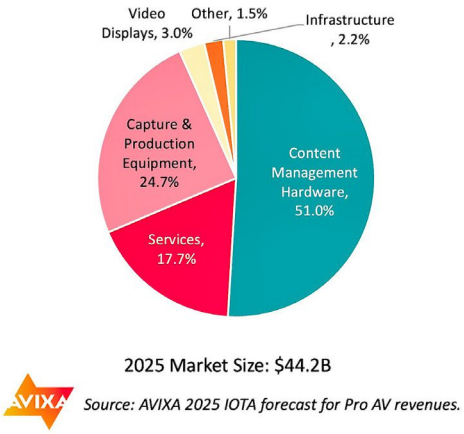

Image: AVIXA

In particular, for brands building direct-to-consumer relationships, the ability to manage, locate, and repurpose content quickly and efficiently is no longer optional; it is a critical capability for both increasing engagement and reducing cost. This is particularly a problem for companies working globally with dispersed and siloed teams.

Content management is the single largest area of investment in AV Broadcast.

Projective has expanded into enterprise content through its *Strawberry* and *Strawberry Skies* platforms. The travel company **TUI** uses *Strawberry Skies* to connect creative teams across Belgium, France, the Netherlands, and out in the field. Hosted in the cloud and integrated with **LucidLink** and **Adobe** *Creative Cloud*, the system allows dispersed teams to collaborate in real time, reduce duplication, and to accelerate delivery. **Arsenal Football Club** similarly adopted *Strawberry* as a production asset management system to organise the flood of media from match coverage, behind-

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the-scenes content, and training ground stories. Automated metadata, proxy previews, and streamlined archiving have allowed editors to spend more time producing and less time searching for files.

Backlight has also delivered real world, enterprise deployments of its *Iconik* content management platform, particularly in the world of sports. The basketball team **Atlanta Hawks** use *Iconik* to manage content from around 1,000 in-house productions each year, spanning campaigns, game promotions, and partner content. *Iconik's* unified hybrid-cloud platform replaced siloed storage, enabling marketing, digital, and creative teams to access and share assets without duplication. Near-live content can now be generated during or immediately after games, allowing broadcast footage and cinematic court shots to be combined into social edits within minutes for greater fan engagement.

Limecraft's work with one of the world's largest music festivals shows how non-broadcast organisations are becoming media companies in their own right. The festival produces and distributes directly for fans, DJs, and sponsors, bypassing traditional broadcasters and creating its own cycle of content and engagement. The scale is vast - around 65,000 media assets generated per weekend across multiple stages, supported by 200 video professionals. Limecraft functions like a private newswire: automatically tagging and routing assets to the right stakeholders, in the right format. The benefits are twofold. It ensures performers and sponsors receive content they can immediately repurpose for social platforms, while the festival itself strengthens its direct-to-fan relationship - creating a cycle of content and engagement for itself and its performers.

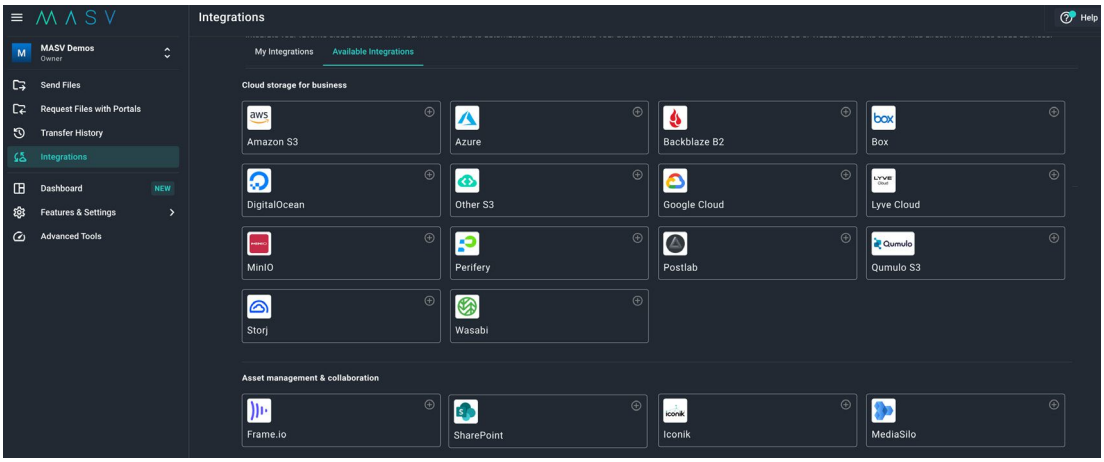

Image: MASV

MASV is also emerging as a backbone for large-scale events and conferences, streamlining the collection and distribution of what can be high-volumes of media files. Its *Portals* feature enables speakers and contributors around the world to upload presentation materials and video files securely, even from locations with limited bandwidth. Uploads can be routed directly through a variety of direct integrations into cloud storage and collaboration tools such as **Adobe**'s *Frame.io*, reducing duplication and saving valuable time. This helps event organisers facing tight deadlines, dispersed participants, and hybrid formats to avoid content bottlenecks for audiences.

> **Content management has moved beyond back-office efficiency—it is now a frontline capability.**

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These technologies demonstrate how content management in the AV Broadcast world is moving beyond back-office efficiency. It is now a frontline capability, enabling enterprises to compete with broadcasters in both speed and scale of output.

Intelligent Hardware

AMD, Nvidia, Wowza

One of the drivers for the ProAV revolution has been the development of more intelligent production hardware - a phenomenon that has also driven the growth of the creator economy. Easier to use technology has put the capability to produce high quality content in the hands of users without traditional and specialist production or broadcast training. This, however, requires more advanced hardware that enables physical devices to run more complex, AI powered software.

In 2022, **AMD's** acquisition of **Xilinx** brought field-programmable gate arrays (FPGAs) into its portfolio, extending its reach into adaptable, high-performance hardware. FPGAs differ from fixed-purpose chips by allowing reconfiguration after manufacture, enabling companies to customise logic and data flows without bespoke silicon. For ProAV and live production, this flexibility is increasingly relevant. Low latency, high throughput, and the ability to reconfigure pipelines on demand make FPGAs attractive for video processing, streaming, routing, and emerging use cases such as AR and VR effects.

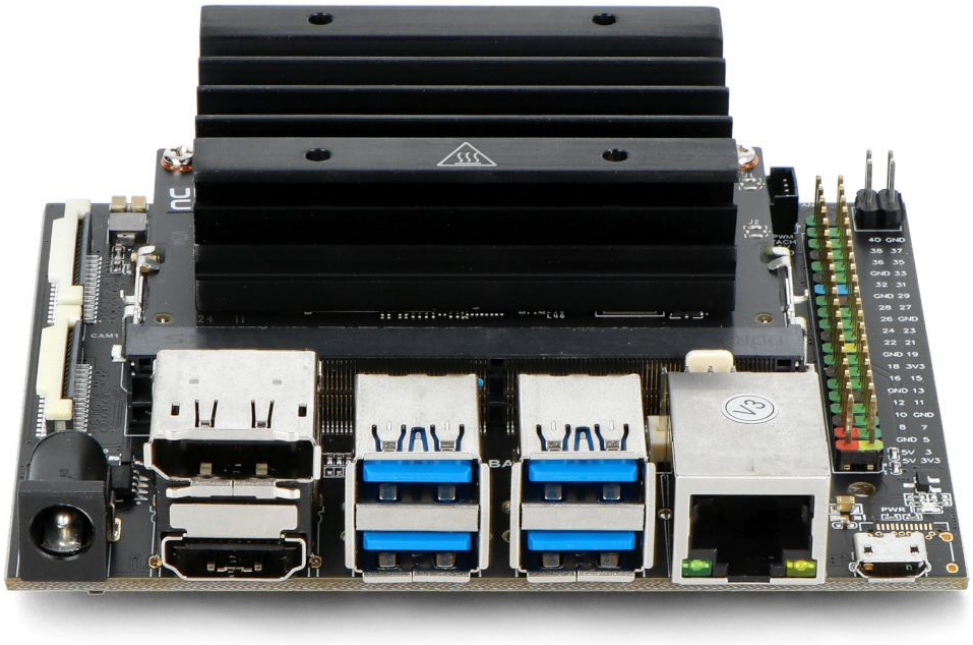

Image: Nvidia / Jetson Nano

Nvidia's *Jetson Nano* is similarly being adopted in ProAV environments as a compact but capable edge-AI module that lets users add intelligence into small, portable, remote production nodes. At just 70×45 mm and drawing only 5–10 watts of power, the Nano can run multiple neural networks in parallel. This makes it capable of handling high-resolution video inputs alongside AI tools for object detection, automated tracking, live streaming, and real-time graphics overlays. This reduces the need

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for costly and expensive full broadcast rigs. At IBC, **Wowza** demonstrated the Nano streaming home security footage while simultaneously running AI intrusion detection. It also reported that customers using *Jetson Nano* with its streaming engine achieved high performance with infrastructure costs reduced by around 30%.

Programmable hardware and compact edge-AI modules highlight how processing is moving closer to the point of capture. For ProAV and live production, this means lower latency, reduced infrastructure costs, and greater flexibility to adapt workflows in real time — extending advanced capabilities beyond traditional broadcast environments.

Audience Engagement

Diversified, Sceenic, Microsoft, Wowza, Unified Streaming

Like production, AV users are taking distribution into their own hands. Direct-to-audience strategies are no longer limited to broadcasters or streaming giants. One of the year's largest fashion shows bypassed its national broadcast partner and achieved record viewership through its own online channels.

> **Direct-to-audience strategies are no longer limited to broadcasters or streaming giants.**

Photo: James Dade
Alex Gannon - San Francisco Giants, Dan Mills - Service Now, and Paul Harding and Duane Yoslov - Diversified.

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On the stage in Hall 8, **Diversified** illustrated strategies that can help companies extend beyond video delivery into richer fan engagement. This included the use of immersive LED displays, spatial audio, and interactive signage. Another powerful tool is mobile phone apps that can be used to directly engage with fans. Alex Gannon, an AV Engineer from the **San Francisco Giants** explained that "The ability to take a fan cell phone camera and let them shoot whatever they're seeing and see themselves on the scoreboard in front of 40,000 people has been completely game-changing". The idea was to create an environment where fans influence events before, during, and after they unfold.

Sceenic, showcased on the **Kaltura** stand, demonstrated how engagement can be brought straight to the viewer's phone. Its *Watch Together* solution integrates chat, video, and co-viewing into a simple mobile app, lowering barriers to participation. By allowing viewers to see, talk, and react in real time, Sceenic is helping turn passive viewing into a shared, interactive experience - proving especially popular with fans of live sports.

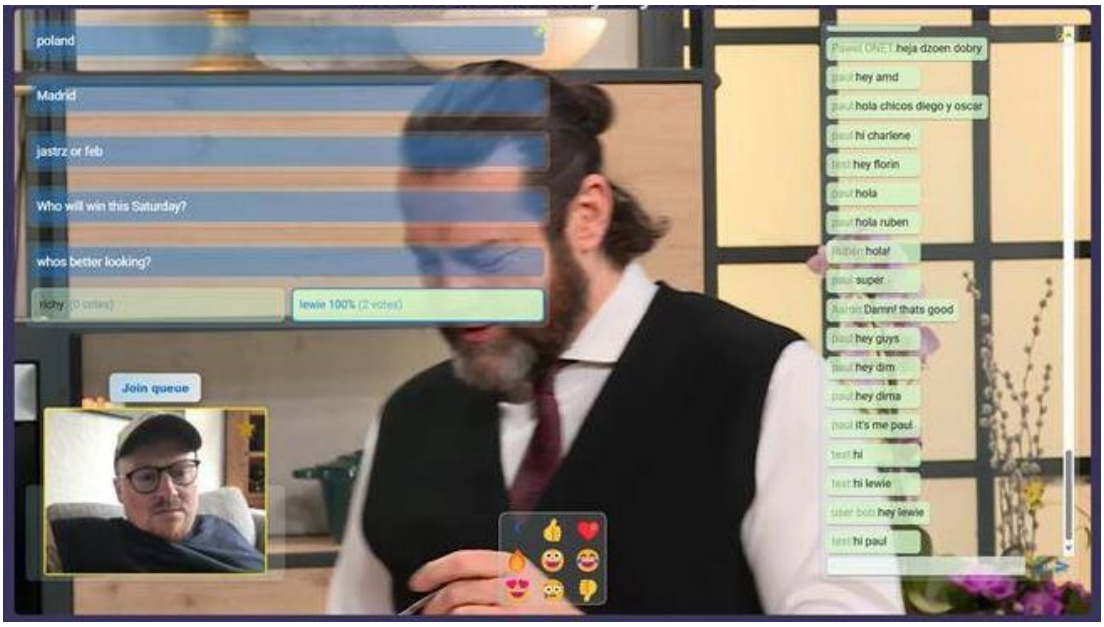

Image: Sceenic

In a similar way, **Microsoft** has partnered with the **Premier League** to develop a new *Premier League Companion* mobile app. The app, built on *Microsoft Copilot* and *Azure AI*, integrates more than 30 seasons of statistics, 300,000 articles, and 9,000 videos into a personalised experience. Features range from real-time insights as well as multilingual Q&A to meet the needs of fans in over 180 countries. Upcoming versions of the app will also introduce more chat-based functionality to deepen the way in which fans interact with their favourite clubs.

Engagement is also scaling down to local and grassroots sport with previously underserved fans. And this has opened some unexpected and lucrative market opportunities. **Wowza** spoke of how its streaming and AI tools are being used by high school and university sports to generate compilations for individual players not only for their families but also for university and professional sports recruiters.

2

> **School and university teams are increasingly using affordable video and AI detection to generate compilations for families and recruiters.**

Finally, **Unified Streaming**'s *Unified Virtual Channel* highlighted how scheduling itself is being reinvented. By dynamically assembling linear-style channels from live feeds and on-demand assets, brands and live event organisers can create pop-up, niche, or hyper-local channels without the constraints of traditional scheduling. The ability to mix live and pre-encoded content seamlessly enables enterprises and event producers to experiment with linear formats and replay-driven event coverage to better engage fans, employees, and investors.

> **Engagement is not only measured by viewership but by the degree to which audiences can take part in the the experience.**

AV broadcast is evolving from producing content to designing interactive ecosystems. In these markets, success is less about audience size or advertising reach, and more about the depth of participation and the quality of engagement.

What Also Caught our Eye - Broadcast/AV Convergence

AVIXA, IABM, Netgear

Earlier in 2025, **AVIXA** and **IABM** launched a joint survey on *Technology Democratisation and Broadcast AV Convergence*. The results underscored how quickly the boundaries between broadcast, ProAV, and enterprise IT are dissolving, driven by common enablers such as IP transport and software-defined workflows. Around 80% of respondents from both associations reported that convergence was impacting their organisations. For vendors, this is translating into pressure to rethink product design, support models, and go-to-market strategies for a broader customer base.

> **For vendors, convergence is translating into pressure to rethink product design, support models, and go-to-market strategies.**

The top three responses for what vendors need to focus on were the same for both IABM and AVIXA members: Ease of Use, Proactive Customer Support, and a Simplified User Interface.

2

Rank	iabm	AVIXA
First	Ease of Use	Proactive Customer Support
Second	Simplified User Interface	Ease of Use
Third	Proactive Customer Support	Simplified User Interface

Image: IABM/AVIXA

This was similar to the message we heard from AV users, integrators and channel experts who contributed to this report. To capture surging cross-market demand, technology must remain simple and accessible.

Another theme was the desire for more direct engagement between vendors and ProAV users - many of whom expressed frustration at feeling distant from manufacturers. Along with proactive customer support, nearly 45% of AVIXA respondents said they wanted more opportunities for user groups and forums, rather than relying solely on channel partners. **Netgear** reported strong uptake of its free *Netgear Academy* programme, offering instructor-led courses to certify users in AV-over-IP design, configuration and troubleshooting.

> **Convergence is not only a matter of technology but also of relationships and expectations.**

These findings suggest that convergence is not only a matter of technology but also of managing relationships and expectations. Vendors will need to walk the tightrope of navigating closer, more direct connections with both their customers and channel sales partners.

Conclusion

At IBC 2025, AV Broadcast is emerging not as a peripheral trend but as a growing link between the broadcast and enterprise markets. Technology itself is not the barrier—broadcast-grade workflows can now be delivered through software and IP based tools. The challenge lies in aligning those capabilities with the budgets, practices, and expectations of AV users.

> **AV Broadcast is emerging as a central theme linking broadcast, and enterprise markets.**

Across live production, content management, engagement, and infrastructure, a consistent message was evident: AV users want simplicity, reliability, and direct value. ProAV organisations are not asking for scaled-down broadcast systems; they demand the fully fledged tools - but refined for their context—smaller teams, mixed-skill operators, and multi-purpose environments.

2

ProAV organisations are not asking for scaled-down broadcast systems; they demand the fully fledged tools.

What was once a clear boundary between Broadcast and AV is now blurring with enterprises and live-event producers adopting technologies once limited to national broadcasters, and vendors rethinking how they design, market, and support their products. The opportunity is substantial, but so is the challenge—ensuring that technology becomes more accessible while preserving the standards of quality, governance, and trust on which professional media depends.

The DPP has assigned AV Broadcast a score of 3

Adoption of broadcast-grade tools is gaining pace across ProAV market sectors. While we have highlighted some strong examples of vendors working well in the AV Broadcast space, customers report many bad experiences, from being talked down to, to being forced into inappropriate broadcast workflows. More vendors need to learn to engage AV users on their own terms.

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3 Data Driven Content

Data has become the operating system of the media industry, influencing what is commissioned, how assets are valued, and where they are consumed. But despite years of investment, many organisations are still struggling to make sense of the vast and fragmented datasets they generate. While the technology is certainly advancing, persistent issues of interoperability and trust remain. Customers also remain concerned about striking the right balance between data and creativity for their audiences.

DPP Assessment

Nascent				Fully mature
1	2	**3**	4	5

Photo: James Dade

Foreword

Ivan Verbesselt
Chief Strategy and Marketing Officer
Mediagenix

mediagenix

The media industry stands at an inflection point where traditional content planning methodologies are proving inadequate for today's fragmented landscape. While we continue to celebrate the wins of personalisation — with engagement up 20-60% and conversions exceeding 35%— it's time to look beyond these tactical wins.

The real challenge isn't just connecting content to audiences; it's designing content strategies that anticipate rather than react. Current planning cycles work on annual horizons with quarterly adjustments, yet audience behaviour shifts weekly and content performance data flows in real-time. This mismatch creates blind spots that cost the industry a fortune in missed opportunities and underperforming assets.

Data-driven strategic planning flips this paradigm. By leveraging anonymised demographic clustering we can identify which content types resonate with specific audience segments before commissioning begins. Engagement data from recommendation engines reveals not only what audiences watch, but also what they're missing—revealing content gaps that traditional research overlooks.

> **This isn't about replacing creativity with algorithms—it's about augmenting imagination with intelligence.**

The opportunity is profound. Effective data integration can materially increase catalogue utilisation, reducing write-offs at license expiry. Some companies now expose over 60% of their catalogue daily, fundamentally improving ROI.

Realising this potential requires a planning toolchain that unifies creative and business stakeholders around a single source of truth. Too often, strategy is undermined by data silos: creative teams operating on intuition, business teams chasing spreadsheets. This friction undermines both artistic vision and commercial objectives.

This isn't about replacing creativity with algorithms. Great content will always require human imagination. But augmenting decisions with intelligence, once invisible, enables creative and business teams to align around a feedback loop of shared insights - making every choice smarter.

The companies that will thrive in tomorrow's media landscape are those transforming planning from an annual ritual into a real-time intelligence layer that continuously optimises strategy.

3

> **As content industries, we are receivers of change. We don't drive technology trends, and we don't drive consumer trends. We are the receivers of these trends. We must set ourselves to be responsive to change and respond quickly when we deem that the actual change is going to be sustained.**

Paul Shanley, Senior Director of Strategy, AP, at the DPP Leaders' Briefing 2024

Topic Summary

- Data is no longer a support function — it is the operating system of the media industry, shaping what is made, how it is valued, and where it is consumed
- Although companies stressed both the opportunities of data-driven precision and the risks of formulaic, algorithm-optimised content
- Vendors are converging on two models: single sources of truth to unify internal operations, and single panes of glass to provide external benchmarks
- Reliable, scalable pipelines remain a bottleneck, with technology closing the gap between data capture and actionable insights

Photo: DPP

3

From Gut to Graph

Media companies are under unprecedented pressure to be profitable. But this is something many are struggling to achieve. Competition for audiences and advertisers is intensifying across a growing range of digital platforms, and lowering the revenues from FAST, AVOD, and SVOD services as a result. At the same time, costs for production, licensing, localisation, and distribution continue to climb.

In our *NAB 2025* report, we explored this 'content crunch' from the perspective of companies seeking to unlock more value from their existing catalogues and archives. Data was central to that discussion — not only as a tool for predicting audience demand, but also as a means of ensuring the costs of releasing content don't exceed the returns.

> **Data has become a primary driver for content strategy.**

Against this backdrop, data has become indispensable. It is now embedded in almost every aspect of the content lifecycle: commissioning, acquisition, production, content transformation, syndication, distribution, and recommendation. Data is now being collected from nearly every point of the media supply business.

> **In 2018, Netflix's process was 70% gut and 30% data. Many feel the balance has shifted even further towards data.**

This shift is not new. Netflix's early exploitation of data in the 2010s is widely seen as the foundation of its rise to become the world's largest subscription video platform. In 2018, Netflix's co-founder Ted Sarandos told *Vulture Magazine* that their process was '70% gut and 30% data'. Most of our contributors felt the balance has now shifted even further towards data.

Useful Data

But what is the data that's underpinning the development of content strategies? Audience analytics remains the most visible category. Companies want to know not only who is watching, but how they watch: when they pause, when they abandon, and when they binge.

As we reported from *IBC 2024*, audience data is also reshaping how we define and segment audiences. Traditional demographics such as age, gender, and geography are giving way to 'tribes' — fluid communities defined by shared interests, irrespective of background. These are often defined via their interest in 'alt genres', also pioneered by Netflix, with thousands of modish labels such as 'deconstructive superhero' or 'feels all the feels.' Tribes and alt genres are increasingly where platforms identify — and promote — their next sleeper hits.

3

Photo: James Dade

> **Traditional demographics are giving way to tribes and alt genres — fluid communities defined by shared interests.**

For ad-funded services, monetisation data is equally critical. Fill rates, CPMs, and placement strategies directly affect yield. Poorly timed ad breaks frustrate viewers and damage brands. Advertisers increasingly demand evidence that their spots are contextually relevant and performance-optimised. There is a demand for more and more contextual data.

Data is also moving upstream into production. Scene-level insights are becoming more valuable: which actors appeared, which products featured, which shots required the most post-production fixes. Linking production data with audience and revenue data enables companies to ask sharper questions: *Why did this expensive action scene coincide with a viewer drop-off? Why did this episode unexpectedly outperform in a secondary market?*

> **Scene-level insights are becoming more valuable: which actors appeared, which products featured, which shots required the most fixes.**

3

Gathering Insights

Where data is abundant, often insights are scarce. And the scale of data is the main challenge. The largest platforms now regularly log over a trillion user interactions daily. Storing and processing such large volumes of data at speed requires significant infrastructure investment, and costs quickly escalate.

> **The largest platforms now log over a trillion user interactions daily.**

Photo: James Dade

The second challenge is reconciliation. Data arrives in multiple formats, and from disparate sources - often quantifying the same behaviours in different ways. It is essential to harmonise metrics if comparisons are to be meaningful. Data containing personally identifiable information must also be cleaned before it can be shared or analysed. Harmonising data becomes even more complex when it is unstructured and from different business units - such as sales and production. But it is the interaction of these data types from which the most valuable insights can be gained.

> **AI has been the enabler that made large-scale data strategies possible.**

3

These factors have made data a prime territory for AI. Traditional methods of working with data sets required structured SQL queries and rigid schemas. LLMs (Large Language Models) and SLMs (Small Language Models) now offer more flexible ways of interrogating unstructured datasets - with a particular objective in mind and using natural language. Several contributors argued that AI has been the enabler that made large-scale data integration possible at all.

Strategic Impacts

Contributors described a wide range of both expected and unforeseen impacts from their migration to a more data-driven content strategy.

- **Commissioning and localisation.** Predictive analytics highlight which stories will resonate in which markets.
- **Experimentation.** Data can reduce risk, enabling a green light to investment in niche or underserved audiences.
- **Agility.** Release strategies can be adapted in real time to audience response.
- **Extended lifecycles.** Titles are never end of life if data can surface new demand for catalogue content.

> **Titles are never end of life if data can surface new demand for catalogue content.**

Not all impacts are positive. Several contributors argued that reliance on data has created a flood of formulaic content engineered for background viewing rather than originality. And some viewers and commentators have also begun to notice.

Algorithm vs Art

The tension between data and creativity is a recurring theme. The phrase 'algorithm movie' has entered the industry lexicon as a shorthand for productions optimised for broad appeal but lacking a creative spark. There is also the rise in content engineered for background viewing rather than active engagement - with easy to follow story lines and lots of explanation.

> **Algorithm movie has entered the industry lexicon as a shorthand for productions optimised for broad appeal but lacking a creative spark.**

Photo: James Dade

3

Critics argue that platforms risk 'enshitification' - a term coined by *Cory Doctorow* - chasing profit through data-optimised outputs that gradually erode quality. There are even hearsay stories of some studios where creative executives are being removed from greenlighting committees, to prevent 'artistic bias' from skewing data-driven decision making.

> **Data has brought efficiency, scale, and precision. But can creativity thrive if artistic instincts are excluded?**

For contributors to this report, the dilemma is clear. Data brings efficiency, scale, and precision. But can an industry rooted in creativity thrive if instinct is systematically excluded? And at what point will audiences turn off? Perhaps this is why creator content - seen as original - is driving so much growth for platforms such as YouTube.

Crawl, Walk, Run

Data is rapidly becoming the industry's new super-tool. Yet turning it into reliable insight is rarely straightforward. Media organisations generate vast volumes of information every day across distribution, finance, operations, and creative functions. This data suggests ranges in formats from tightly structured databases to unstructured text and video. The challenge is less about scarcity than about coherence.

> **The challenge is less about scarcity than about coherence.**

Contributors stressed that success depends on a disciplined approach - framed as a 'crawl, walk, run' journey. Crawling means first understanding what data exists, where it sits, and how it is defined. The risks of skipping steps are significant. Without a stable foundation, entire data strategies can be undermined by inconsistencies or blind spots. This is particularly acute as AI becomes a cornerstone of data workflows. Poor-quality or fragmented data is easily amplified by machine learning models, leading to hallucinations, spurious correlations, or misplaced confidence.

> **Without a stable foundation, AI will only amplify bad data.**

The message from both vendors and customers is clear: data maturity is incremental. Ambition must be matched by rigour, and those who move steadily stand a better chance of transforming data into a genuine decision-making asset.

3

Data Pipelines

Genesis Computing, Hydrolux, MASV, Data Expedition Inc.

One of the biggest challenges for media data workflows is scale. Data arrives from multiple sources, in multiple formats, and often at terabyte levels per day. Building and maintaining pipelines robust enough to move, cleanse, and reconcile that data is a huge challenge for media companies. Contributors described not only the technical difficulty of standing up new pipelines, but the ongoing operational burden of ensuring those flows remain relevant as business objectives change.

> **Data pipelines must continually adapt as business objectives shift.**

Several vendors are positioning themselves at this bottleneck. **Genesis Computing**, referenced earlier in the Agentic AI chapter, applies multi-agent orchestration to enterprise data management. Its platform deploys agents across three domains: *Data Engineering*, to accelerate pipeline builds and migrations from external and legacy systems; *Data Ops*, to monitor flows and surface failures in real time; and *Business Analysis*, to expose insights through natural language queries. The aim is to easily create more resilient pipelines for actionable data.

> **The gap between data capture and data insight is now one of the industry's biggest bottlenecks.**

The gap between when data is generated and when it becomes usable is another source of anxiety for contributors. Whether troubleshooting live streams, monitoring ad performance, or feeding AI systems, the latency between capture and insight can be critical. **Hydrolix** addresses this challenge with what it calls a streaming data lake. Capable of ingesting up to 100 TB per day, it merges multiple streaming log sources into a single table for real-time analysis. By integrating with major CDN platforms and visualisation tools, Hydrolix positions itself as an engine for 'unified observability'. At IBC 2025, the company demonstrated a live stream instance appearing on a monitoring dashboard within eight seconds of being initiated — a vivid illustration of the speed demanded by customers.

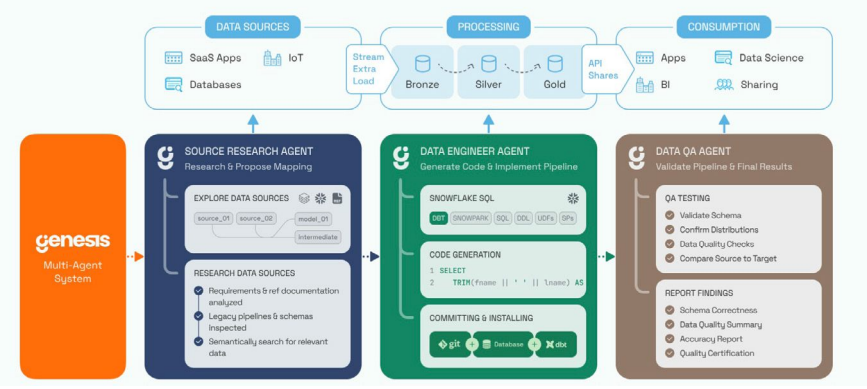

Image: Genesis Computing

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MASV has focused on one of the industry's most persistent challenges: moving very large, unstructured datasets into the cloud for AI training. The bottleneck is around the diversity of ingest points for data and the difficulty of consolidating these sources into a usable whole. MASV offers a wide range of preconfigured integrations with leading cloud storage and data platforms, enabling faster design of workflows that assemble coherent training datasets. These integrations also make downstream sharing and use of the data more straightforward, ensuring that once ingested, content can flow easily into other connected services.

> **Plumbing, not dashboards, defines the pace of media intelligence.**

Data Expedition Inc. provides a middleware layer for file-based data transfer that prioritises security along with speed and predictability. Unlike SaaS services that route content through third-party infrastructure, its software sits directly within the customer environment—ensuring that sensitive datasets remain under the owner's control. This model has proven valuable not just for creative studios moving VFX and post-production assets, but also in industries such as pharmaceuticals, where multi-terabyte research must be shared without compromising confidentiality.

Reliable, scalable, and low-latency pipelines are fast becoming the hidden foundation of media strategy. Plumbing, not dashboards, defines the pace of media intelligence. Vendors are competing to solve the same problem: how to prepare and move data at the speed media businesses demand.

Single Source of Truth

Mediagenix, UTO Solutions, Amagi, Merapar, Aceedo

As the volume of media data grows, the industry is splitting between two approaches. Some advocate a *single source of truth* that consolidates everything into one authoritative, cross-departmental system. Others argue this is unrealistic, and instead point to a single pane *of glass* model, where multiple and distinct datasets are analysed together under a consistent lens. Both approaches aim to reduce friction and enable smarter decisions.

Mediagenix exemplifies the single source of truth model. Long known for its *WhatsOn* scheduling platform, the company has expanded into a wider content supply chain role, layering in acquisitions and new technologies to support rights management, scheduling, personalisation, and audience intelligence. At the DPP's *IBC 2025 Espresso Summit*, Chief Strategy and Marketing Officer Ivan Verbesselt described this as a flywheel: a cycle where data not only informs decisions but is enriched by them, gaining value with every turn.

3

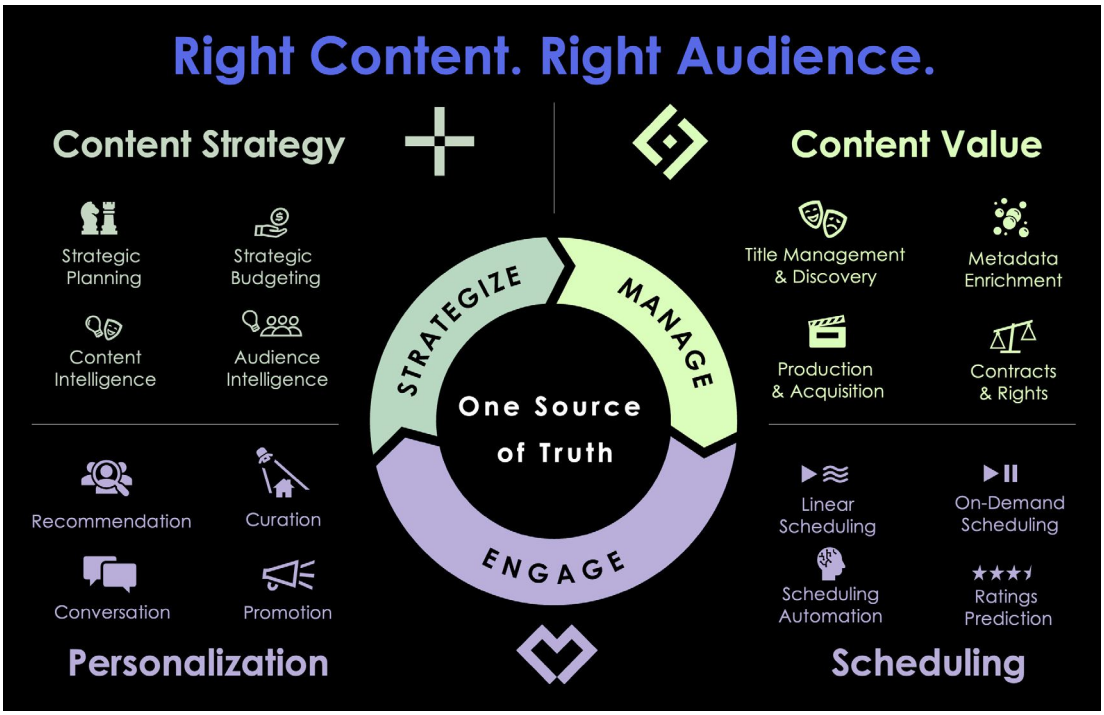

Image: Mediagenix

Mediagenix frames this loop around three stages—Management, Engagement, and Strategisation. Its tools such as *Smart Content Pool*, *Scheduling Artist*, and *Continuity Artist* enable operators to manage rights, automate scheduling, and reduce manual effort. Personalisation, powered by the *Mediagenix Recommendation* platform (formerly **Spideo**), extends the model to audiences, enabling tailored discovery and promotions. For an industry struggling with fragmentation, Mediagenix positions a unified data set not just as an efficiency play, but as the foundation for growth.

> **A unified dataset is not only about efficiency — it is increasingly the foundation for growth.**

UTO Solutions has approached the challenge from its heritage in rights management. Its tools are designed to unify fragmented data from linear and digital platforms into a single planning environment, with AI and natural language interfaces making datasets more accessible. Rather than deploying large, general-purpose models (LLMs) to process this data, UTO has concentrated on smaller, domain-specific language models (SLMs) tailored to meet the needs of specific use cases such as legal contracts or compliance. This approach is pragmatic rather than utopian, and has proven effective in low-ARPU (average revenue per user) markets, where each viewer may generate only a few dollars and where efficiency can make the difference between profit and loss.

> **UTO has found success with smaller, domain-specific language models for contracts and compliance.**

3

Amagi has developed a similar unified approach to data by integrating its *Amagi Intelligence* AI tools into its unified *Amagi NOW* platform. The platform is used by customers to manage the full media workflow chain from production, preparation, distribution and monetisation across a variety of services including live, linear, and VOD. *Amagi Intelligence* can process the data generated across these workflows, including historical viewership, contextual metadata, and real-time behaviour, to help optimise and automate decisions. In a similar way to Mediagenix, this treats the process of scheduling, engagement, and advertising as one continuous feedback loop to help automate distribution and optimise monetisation returns.

Merapar is tackling the problem at the infrastructure level. Its *Unified Mediadata Platform (UMP)* is designed as an AI-driven, media optimised, data backbone, aimed at aggregating and standardising data from multiple sources to create a '360-degree data foundation'. Merapar has formed a partnership with **Aceedo** to bring together UX analytics, engagement metrics, and monetisation data to speed up feedback loops, and enable more agile monetisation experiments. This data helps power Aceedo and Merapar's agentic AI platform covered earlier in this report.

> **Vendors' paths differ, but all are converging on the need for consistent, reliable intelligence.**

What is striking is not that companies are converging on a single data model approach, but that they are arriving from very different starting points: scheduling, rights management, distribution, or infrastructure. The destination — consistent, actionable data — is shared, but the paths to it reflect the histories and priorities of each supplier.

Single Pane of Glass

Fabric, Luminate

While a single source of truth can create internal coherence within a media business, it is a difficult approach when it comes to capturing the wider market picture. For that, companies are turning to platforms that aggregate data across the industry to surface patterns in pricing, distribution, and audience behaviour. The aim is less to reconcile every available dataset, and more to define a benchmark against which strategies can be assessed.

> **Internal coherence is not enough — without external benchmarks, strategies risk isolation.**

Fabric, following its acquisition of **BB Media**, launched *Origin* Insights to deliver cross-industry intelligence. The platform tracks audience demand trends, distribution patterns, pricing and bundling strategies, and even piracy activity, by market.

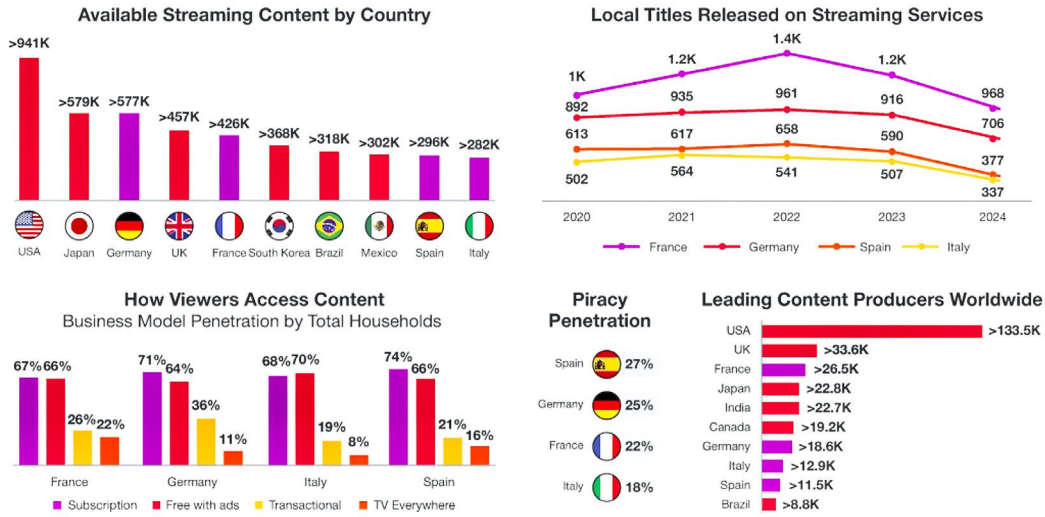

Image: Fabric

Offered in both free and premium tiers, *Origin Insights* allows executives to benchmark decisions according to industry wide data — from testing launch strategies in new markets to evaluating the competitiveness of licensing deals. This enables insight that cuts across individual titles, content companies, streaming platforms, and regional markets.

Luminate brings a different angle, combining data signals from more than 500 verified industry sources spanning streaming, sales, airplay, broadcast, and metadata. Rather than focusing on distribution and pricing, Luminate focuses on linking content performance to consumption patterns across film, television, and music. When a song features in a hit drama, for example, Luminate can correlate spikes in streaming with programme viewership. This helps companies to get a better perspective by mapping a feedback loop that can help explain the rationale for the complexities in audience behaviour.

> **Context matters: industry-wide intelligence is now a competitive necessity.**

It's increasingly important to step outside the organisational silo. Internal systems may deliver coherence, but without external benchmarks they operate in isolation. Broader visibility is needed to place internal data within the wider context of market trends, audience behaviour, and competitive dynamics.

Datafying the Media Supply Chain

Perfect Memory, Limecraft, Dalet, Prime Focus Technologies (PFT), Vubiquity, Adapt, DubHub

Much of the industry's attention has focused on data about audiences, markets, and monetisation. But contributors stressed that internal supply chain data is just as critical and often overlooked. Understanding how productions are made, how assets move, and where costs accrue, can have as much impact on profitability as audience analytics.

3

Internal supply chain data can be as critical as audience analytics.

Perfect Memory illustrated this with a proof-of-concept for a major US studio, transforming non-standardised, human-readable production spreadsheets into structured datasets. Unstructured on-set daily reports in three different, manually entered, Excel/PDF formats — including lists of who was on set, roles, call times, breaks, stunts, health & safety notes, and so on — were ingested , parsed by AI and converted into structured CSV files. Perfect Memory then aligned these to a common domain model based on **MovieLabs'** *OMC* work via its *Pilote* data mapper. The result was an operational view of shooting days, staff utilisation, and costs, creating a foundation for benchmarking and efficiency gains across multiple productions - ultimately informing cost-saving decisions before the next shoot even starts.

Limecraft took a different route, capturing structured data at source during live and unscripted production. Instead of retrofitting AI to parse human-readable reports, Limecraft deployed a direct input model—capturing structured data at source through apps on iPads. These notes were logged live and delivered to the cloud alongside HLS feeds streamed from a multi-camera **EVS** system. Editors could begin cutting immediately in the cloud from the growing video segments while taking note of production data that flowed directly into post production workflow. without the traditional handover. The approach effectively skipped the traditional handover, replacing the role of the editorial. The result removed days of manual work and accelerated turnaround.

Assets can be valued by their impact over time.

Dalet demonstrated how supply chain data can reshape asset valuation. By linking usage data to production files and edits, Dalet was able to calculate not just production and acquisition costs but the lifetime value of content per contributor and per shot. In a use case with a major UK broadcaster, this was used to demonstrate which natural history sequences delivered the highest return based on their actual use— a shift from assessing assets by price tag to measuring them by actual impact over time.

Similar data was also captured by **Prime Focus Technologies**, which demonstrated automated tagging of locations, talent, and even crew. These tags can follow an asset down the supply chain, enabling metadata to remain attached and actionable as content is reused. In practice, this makes it easier to automatically generate promotional materials targeted at specific artists or markets - or to react quickly to trending hashtags on social media.

Vubiquity extended this principle into monetisation with continued development of its *Catalog Intelligence* platform. Instead of simply preparing libraries for release, the system uses AI agents to assess content quality, map regional demand, and model licensing returns. By linking rights frameworks with usage data, sales operators can decide not only what to release, but how, where, and at what price.

Localisation is moving towards revenue-sharing models that lower risk.

3

This focus on supply chain data is also shaping new business models. In localisation, companies such as **Adapt** and **DubHub** are experimenting with revenue-sharing arrangements - long used in FAST to reduce upfront cost. Instead of paying fixed fees, content owners can bring titles into new markets by sharing future returns, lowering the financial risk of expansion while still enabling broader distribution.

From production spreadsheets to catalogue monetisation, the act of getting data from the media supply chain is reframing internal workflows as a source of strategic advantage. Visibility into the hidden mechanics of content creation and distribution is just as critical as audience insight.

Predictive and Prescriptive Analytics

Largo.ai, Mediagenix

While supply chain data helps optimise what already exists, predictive analytics is being used to shape what comes next. The aim is not only to understand past performance, but to forecast audience response and guide commissioning, acquisitions, and scheduling with greater precision.

> **Independent producers now have access to testing tools once reserved for major studios.**

Largo.ai is aiming to make audience testing a more viable option for independent producers working outside the major studios. Its platform uses AI-powered 'virtual screenings' to simulate how different demographic or cultural groups might respond to a screenplay or rough cut. Producers can run content past customised virtual cohorts — from broad age bands to niche communities — and receive feedback on engagement, pacing, and cultural resonance.

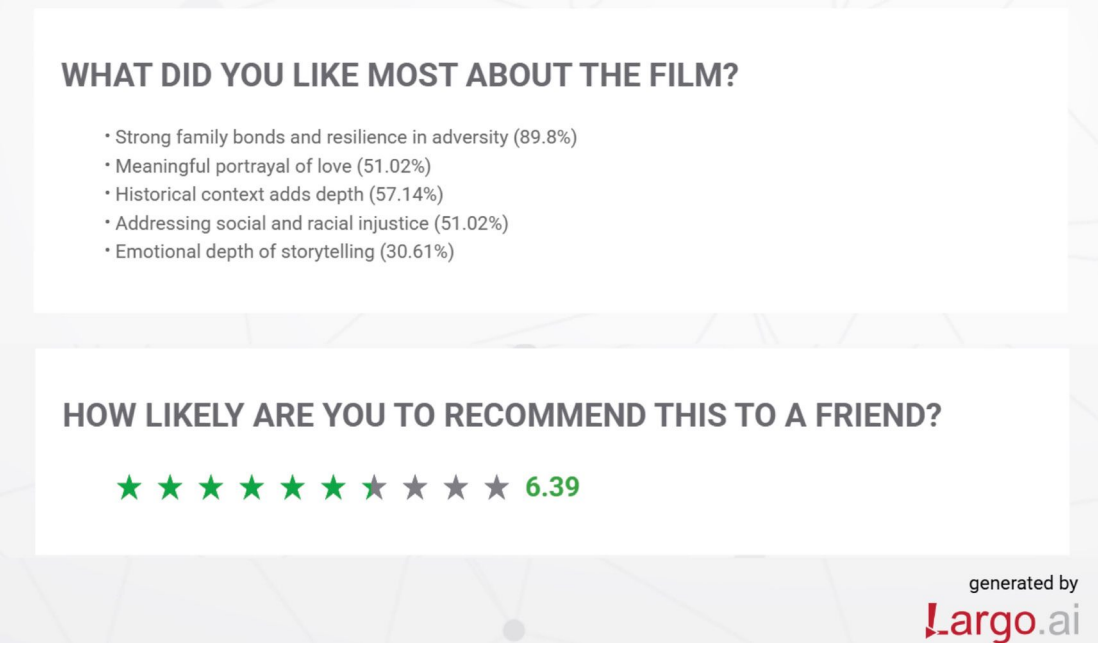

Image: Largo.ai

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Mediagenix has applied predictive analytics more directly to scheduling and monetisation. Its *Ratings Artist* tool forecasts demographic-level ratings up to 90 days in advance, combining historical viewing patterns with metadata and context such as genre, timing, and channel. Predictions are accompanied by confidence scores and can be overridden by human schedulers where needed. For broadcasters and FAST operators, the attraction lies in being able to align scheduling and ad inventory with more reliable audience expectations.

> **Predictive analytics now addresses both the why and the how many of audience behaviour.**

Predictive analytics is tackling both sides of the content equation. On one hand, it explores the *why* — sentiment, pacing, and cultural fit. On the other, it addresses the *how many* — projecting audience volumes and revenue potential once content is scheduled. The effect is a shift from data as retrospective reporting to data as a forward-looking engine for strategy.

Ad Monetisation

Bitmovin, Amagi, Kaltura, WideOrbit, YoSpace, Dolby

Advertising remains the lifeblood of much of the media industry, but the mechanics of monetisation are under strain. The growth of FAST, live streaming, and hybrid ad models has created new pressures on how inventory is sold, targeted, and measured. Contributors described two clear imperatives: data must be harnessed to deliver ads that are more contextually relevant, and data must be used more efficiently to make ad breaks more technically reliable.

> **Data must deliver ads that are more contextually relevant and make ad breaks more technically reliable.**

Bitmovin is extending contextual intelligence into the ad workflow via its *AI Contextual Analysis* product by embedding multi modal analysis directly into its encoding process. As content is processed, video, audio, and text are scanned to identify the emotional and narrative context of each scene. This metadata is then passed to the *Bitmovin Player*, which uses it to call for ads that are contextually aligned. The approach reduces the risk of mismatched placements, improves viewer experience, and provides advertisers with a clearer assurance that campaigns appear in suitable environments. Crucially, the data is generated in standard IAB formats, making it directly consumable by agencies and ad buyers.

Similar strategies are emerging elsewhere. **Amagi**, through its *Amagi Intelligence* platform, and **Kaltura**, via its *Media Publishing Agent*, are both applying AI to assess content context and shape ad breaks accordingly. The aim is to make placements less intrusive and more aligned with the surrounding narrative, improving both viewer experience and advertiser confidence.

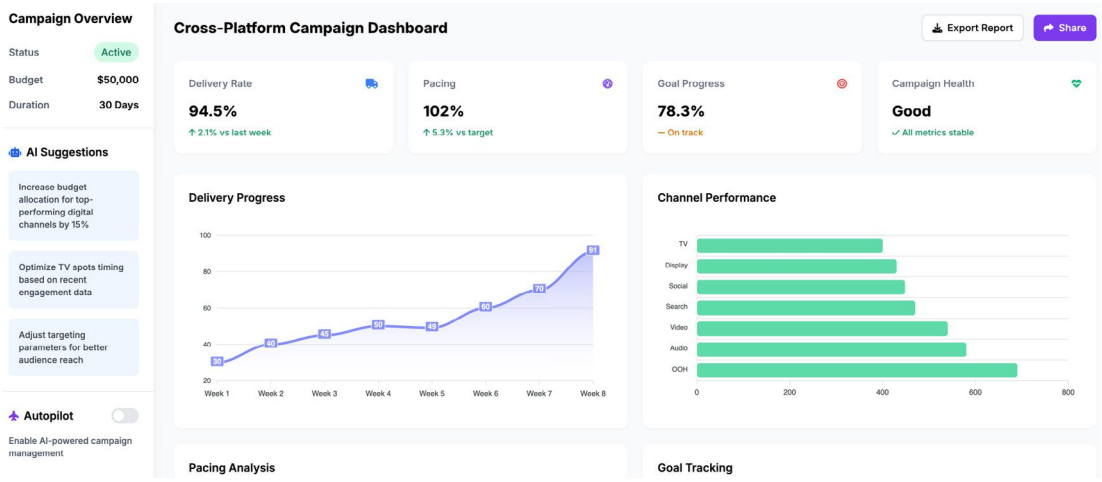

Image: Wide Orbit

A recurring theme in this report has been the heavy administrative burden placed on sales teams. **WideOrbit's** *WO Digital Hub* tackles this through a single pane of glass approach, positioning itself as a backbone for digital ad revenue operations. By unifying functions that were once spread across CRM systems, rate cards, ad servers, forecasting, and finance, the platform streamlines workflows and brings greater coherence to sales processes. Tasks such as campaign creation, trafficking, billing, and reporting can be automated — increasingly with the support of agentic AI tools as discussed earlier — freeing sales teams to focus on selling rather than researching. This approach also helps with tracking metrics across all distribution channels.

Another recurring pain point raised by contributors was the difficulty of reliably filling ad breaks. The problem here is inefficiency in the way data is communicated back and forth between players and ad servers. It is most acute in live sports, where audiences are larger and stoppages are unpredictable. However, it is also becoming a bigger problem in FAST, where dynamic rather than fixed breaks are on the rise.

YoSpace has targeted this challenge with a dynamic prefetch system designed to prepare ad pods in advance of unsignalled breaks. In traditional workflows, all viewers hit the break point simultaneously, placing sudden strain on ad servers and often producing empty slots or 'blank slates' when return requests are not forthcoming. By pacing ad requests before the break occurs, YoSpace's system spreads the load and ensures inventory is ready to deploy when needed. In the case of truly unexpected pauses due to player injuries or Video Assistant Referee review, the platform can fall back on a preloaded contingency pod. YoSpace has partnered on this approach with **DIRECTV**, which has reported higher technical fill rates, fewer blank slates, and more consistent yield. It has improved the viewing experience for its premium live content.

Another approach to this problem which we heard a lot about at IBC 2025 was Server-Guided Ad Insertion (SGAI) - a hybrid between server-side and client-side insertion. In this model, the server signals where breaks should occur, but the client's video player makes the final request and manages playback.

3

Dolby OptiView reports SGAI trials with 132% higher fill rates and 76% higher eCPMs than SSAI.

Early deployments, including those reported by **Dolby's** *OptiView*, suggest that SGAI can significantly improve performance. Trials showed around 132% higher fill rates and 76% higher eCPMs compared with traditional server-side setups, largely by reducing wasted ad requests and allowing more flexible ad-break logic. The model is particularly relevant for live sports and other high-audience events where both scale and responsiveness are critical.

SGAI, however, is still early in its adoption. Wider deployment will depend on the availability of compatible players, ad servers, and SDKs. Standardisation is also a factor. Vendors are looking to frameworks such as *Common Media Client Data* (CMCDv2), to help provide the structured methods for exchanging performance data between players and CDNs needed to underpin accurate measurement and reporting.

Up-to-date monetisation strategies now require highly dynamic uses of data. Contextual relevance, predictive yield management, and technical reliability are now required for delivering ad-supported media. Advertising is now a real-time, data-driven discipline where performance depends as much on strategy as inventory.

What Caught our Eye: Sustainability

Dot Group, Humans not Robots

Data is not only reshaping how content is created, distributed, and monetised — it is also becoming central to how the industry approaches sustainability. By logging energy use, mapping carbon impact, and linking resource consumption to workflows, data is turning sustainability targets into measurable, actionable practice. At IBC 2025, several initiatives showed how carbon awareness can be embedded directly into the operational fabric of media supply chains.

Data is turning sustainability targets into measurable practice.

Dot Group showcased a new product called *GreenDot*, a lightweight application and dashboard for measuring and managing the carbon footprint of content delivery chains. Running on either cloud or on-premise hardware, *GreenDot* logs resource use continuously and translates it into real-time carbon data. In addition to monitoring, it can also highlight opportunities to reduce impact — from resizing cloud instances to spreading load globally through orchestration platforms. A free version currently supports a single device, while the paid tier aggregates data across multiple nodes, making reporting tangible and actionable.

Image: Dot Group/GreenDot

Humans Not Robots (HNR) demonstrated *HNR to ZERO*, a platform that similarly measures and benchmarks the carbon footprint of technology operations. Using machine learning, it captures infrastructure data across cloud, hybrid, and on-prem environments, identifies inefficiencies, and suggests changes through a three-step process: discover, advise, and automate. HNR is also involved in the IBC Accelerator projects *ECOFLOW* and *ECOFLOW II*, which aim to standardise methods for measuring the energy consumption of streaming from origin to device, and to test mitigation strategies in real-world conditions.

> **Sustainability is shifting from policy to practice.**

Both approaches point to the same trend: environmental impact can become a measurable component of the media supply chain. Where initiatives such as **BAFTA Albert** provide production standards, and **MovieLabs** embeds sustainability principles into workflow design, tools like *GreenDot* and *HNR to Zero* supply the real-world data needed to operationalise those frameworks. The shift signals a move from policy to practice — generating the quantifiable data needed for action.

Conclusion

The shift to data-driven decision making is reshaping every stage of the content lifecycle. From commissioning and localisation to scheduling, monetisation, and sustainability, data is now the connective tissue linking creative and commercial objectives. Contributors described both the opportunities and the tensions: greater precision in planning and yield management, but also the risk of formulaic output and over-reliance on algorithms.

The market remains fragmented but there have been a lot of developments. Vendors are supplying increasingly sophisticated tools, although there is still some room to improve around standardisation, interoperability, and building reliable insights.

> **Data is no longer a support function. It is becoming the operating system of the media industry.**

3

What is clear is that data is no longer a support function. It is becoming the operating system of the media industry — a framework that informs not just how content is distributed, but what is made, how it is valued, and where it is consumed.

The DPP has assigned Data Driven Content a score of 3

Data now underpins commissioning, valuation, and consumption across the media industry. Yet many organisations still struggle to make sense of fragmented datasets - despite ongoing investment. Interoperability, trust, and the balance between data and creativity remain unresolved.

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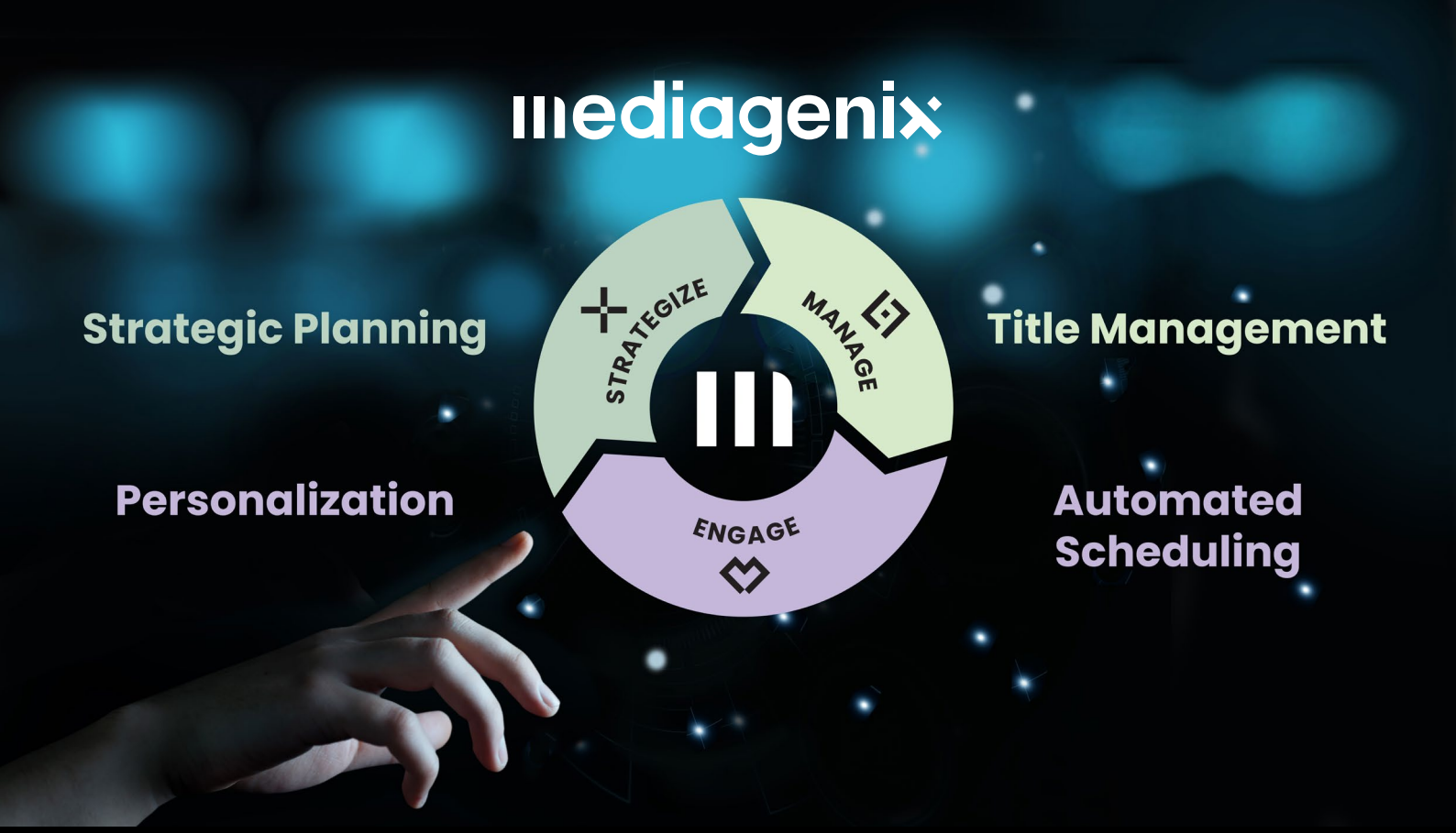

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Trends in Demand vs Supply

The first DPP Demand vs Supply report, at NAB 2023, was an experiment. Could we use the lens of customer 'demand' and vendor 'supply' to cut through the noise of major trade shows and provide clear insight into product maturity in key areas that mattered to buyers.

> **The aim of Demand vs Supply has been to provide clear insight into product maturity in areas that matter.**

Three years on, the experiment has become an established series. With six editions published — three from NAB and now three from IBC — the reports form a continuous record of how customer needs, vendor offerings, and industry dynamics have evolved during a turbulent period in media and entertainment.

Across six reports, contributors have guided us on 23 distinct topics. And for each topic we assigned a maturity score - from 1 (nascent) to 5 (fully mature) based on our findings.

Looking back we have identified four key themes for the demands we have covered, presented below by topic and score.

Nascent 1 2 3 4 5 Fully Mature

Theme	2023		2024		2025	
	NAB	IBC	NAB	IBC	NAB	IBC
AI	Localisation 4	Generative 2	Co-pilot 3			Agentic 2
Production Innovation	Cloud Live Production 3 5G & Wireless 2			Newsroom Innovation 4 Empowering Creators 4		AV Broadcast 3
Operational Effectiveness	Complex Workflows 3	Modular Asset Management 4 Simplifying Automation 4	Content Integrity 2 Increasing Accessibility 4		Pragmatic QC 4 Going Virtual 3	
Profitability	Simplifying FAST 4	Optimising Streaming 3	Next-Gen Ad Tech 3	Understanding Audiences 3 Engaging Users 3	Valuing Content 3	Data-Driven Content 3

Theme 1: AI

Average Maturity Score 2.75

- **AI for Localisation - NAB 2023** 4
  Advances in transcription and translation pushed AI into mainstream workflows, scoring 4 for maturity. It remains one of the most widely adopted use cases.
- **Generative AI - IBC 2023** 2
  Exciting, but controversial. Legal and ethical concerns, amplified by the SAG-AFTRA strikes meant the hype outweighed practical applications.
- **Co-pilot AI - NAB 2024** 3
  Practical assistance tools embedded into workflows made tasks easier, though still uneven in maturity.
- **Agentic AI - IBC 2025** 2
  Autonomy captured attention but raised concerns over transparency and governance. Prototypes abound, but deployments are rare.

With the lowest average maturity score, AI has delivered best where it solves practical problems and struggles where ambition has outpaced trust.

Theme 2: Production Innovation

Average Maturity Score 3.2

- **Cloud Hosted Live Production - NAB 2023** 3
  Early demonstrations showed how cloud could democratise live output. The DPP has revisited this topic in more detail in our latest 2025 insight report, *Cloud Native Live Production*.
- **5G and Wireless Production - NAB 2023** 2
  Mobile technology is making wireless production possible in cities, stadia and remote locales. In 2023 this scored a 2, but it has come a long way since. .
- **Newsroom Innovations - IBC 2024** 4
  Cloud and mobile tools are reshaping a new, 24/7, digital first journalism.
- **Empowering Creators - IBC 2024** 4
  Advances in prosumer technology enabled the rise of new classes of content makers.
- **AV Broadcast - IBC 2025** 3
  Corporations, educators, houses of worship, and brands are embracing broadcast technologies to produce professional-grade content. But broadcast vendors are still learning how to serve them.

Professional tools are reaching new users, and those users are redefining what ‘broadcast’ means.

Theme 3: Operational Effectiveness

Average Maturity Score 3.4

- **NAB 2023 - Tracking Complex Workflows.** 3
  As one of our contributors put it: “I’m tired of asking where my stuff is”. Earning a score of 3, visibility is improving, but still a challenge.
- **IBC 2023 - Modular Asset Management** 4
  Monolithic MAMs are giving way to more flexible, metadata-driven systems.
- **IBC 2023 - Simplifying Automation** 4
  No-code and low-code approaches made workflow automation possible without development.
- **NAB 2024 - Content Integrity** 2
  Gen AI has accelerated risks of manipulation, while adoption of C2PA and AI-based detection tools is limited. Standards are forming, but implementation lags.
- **NAB 2024 - Increasing Accessibility** 4
  Demand for subtitling and dubbing are driving rapid AI-enabled scale.
- **NAB 2025 - Pragmatic QC** 4
  Contrary to expectation, QC has become even more essential in the digital era.
- **NAB 2025 - Going Virtual** 3
  Virtualisation proved useful in some cases, but not universally cost effective.

Customers have been pleading with their vendors for years to understand and help them simplify their operations, and enable them to build more effective businesses. With the highest average maturity score, the indications are that many vendors have listened and responded well. In an ever more complex media supply chain there is a mutual intent on keeping it simple.

Theme 4: Profitability

Average Maturity Score 3.1

- **NAB 2023 - Simplifying FAST.** 4
  Monetisation proved harder than hoped, but cost-saving tools scored 4.
- **Optimising Streaming - IBC 2023** 3
  Spiralling costs drove adoption of new encoding and distribution methods.
- **Next-generation Ad Tech - NAB 2024** 3
  Advertisers gained more choice; vendors responded with more contextual targeting.

- **Understanding Audiences - IBC 2024** 3
  Behavioural data is replacing traditional demographics.
- **Engaging Users - IBC 2025.** 3
  Personalisation is the weapon of choice to keep viewers engaged, though signs of fatigue are emerging.
- **Valuing Content - NAB 2025** 3
  AI is helping to surface revenue from content archives and libraries.
- **Data-driven Strategies - IBC 2025** 3
  Commissioning, scheduling, and localisation are increasingly driven by evidence and not gut instinct. Vendors are taking lots of different approaches but customers are still struggling to order their data.

Profitability has generated the most topics in the series, reflecting both its importance and its difficulty.

The Road Ahead

After six reports, one picture is clear. Transformation is now perpetual. New technologies, economic pressures, and cultural shifts ensure that the demand–supply cycle will never stand still.

> **The demand-supply cycle will never stand still.**

The role of this series remains unchanged: to capture customer demands, test them against supplier responses, and highlight where alignment — or misalignment — remains.

We have gathered those demand requirements into four overarching themes. With time, we may need to subdivide those categories further as media companies home in on friction points that may be so significant as to pose an existential risk.

In the meantime, we remain hugely grateful to all the vendors and customers who engage with us so openly in this unique twice-yearly audit.

Image: James Dade

Conclusion

IBC 2025 underscored the shifting dynamics of an industry caught in a cycle of perpetual transformation. The topics covered in this report reflected that. Agentic AI is forcing vast changes in how work is executed and governed. ProAV convergence is challenging long held assumptions of production and broadcast. And data is displacing instinct as the basis for future strategy.

> **IBC 2025 underscored the shifting dynamics of an industry in perpetual transformation.**

The broadcast trade show, once the central forum for technology, is shrinking in both size and influence. Exhibitor numbers have stalled and attendee behaviour has changed. Visits are shorter, meetings are almost entirely pre-arranged, and networking happens at smaller, more specialist events. The role of the show floor itself is less certain. And a growing number of contributors are questioning the unique value of the trade show experience.

> **The broadcast trade show, once the central forum for technology, is shrinking in size and influence.**

At the same time, new markets and technologies are reshaping the landscape. ProAV and creator communities bring different expectations, investment models, and product needs. Their presence at NAB and IBC is no longer peripheral and their influence is likely to continue to grow..

The long-running trend towards software has also accelerated, though not entirely in the cloud. Hybrid strategies have reinforced the importance of scalable, elastic, software-led models. Commodity hardware remains - although it is software that defines the innovation.

Transformation fatigue is now a tangible risk.

This relentless transformation has consequences. For most companies, change is no longer episodic but endless. The burden on people, processes, and budgets is evident, and transformation fatigue is now openly discussed. Yet competitive pressure leaves little room to slow down.

Regional differences are also becoming more pronounced. At IBC 2025, repatriation and sovereignty concerns were front of mind for many content owners and highlighted at the show in some unexpected places. Travel patterns suggest fewer Europeans at NAB and fewer North Americans at IBC. Whether this signals a long-term regionalisation of trade shows, or simply temporary market or geopolitical conditions, remains uncertain.

Regional divides are becoming more pronounced, with fewer Europeans at NAB and fewer North Americans at IBC.

The broadcast trade show is no longer the singular hub it once was. It is now part of a broader, more fragmented ecosystem in which traditional broadcasters are now competing with creators, and proAV users, to exert influence.

The very definition of the media and entertainment industry is now up for grabs - and with it the definition of the trade show required by a sector that has been so drastically reshaped.

In assigning its maturity scores at NAB and IBC shows to come, the DPP will increasingly be asking itself ‘mature enough for what?’

But what was evident at IBC 2025 was that the vendor community is fully focused on the real world challenges faced by modern content companies. It is no small matter that, just at the very time that the boundaries between the ProAV and Broadcast markets are becoming blurred, vendors have meanwhile engaged with the extraordinary complexity of agentic AI and data workflows.

Has business development ever been more challenging?

About Prime Focus Technologies:

Prime Focus Technologies (PFT) is the creator of CLEAR®. It offers streaming platforms, studios, and broadcasters AI technology and media services powered by the cloud that help them enable creativity, efficiency, and, most importantly, revenue generation. PFT works with major companies like Walt Disney-owned Star TV, Channel 4, ITV, Sinclair Broadcast Group, A&E Networks, Warner Bros. Discovery, Hearst, PBS, Paramount, Lionsgate, Crunchyroll, Insight TV, Disney+ Hotstar, BCCI, Tegna, Amazon MGM Studios and more.

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Photographs by James Dade and the DPP.