



# THE STATE OF VIDEO IN THE ENTERPRISE

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A KALTURA REPORT



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# 1. Executive Summary

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Video is everywhere - transforming the way we learn, work, shop, communicate, collaborate and entertain. Video has become a critical tool for communication, learning and knowledge-sharing in organizations. With its unique ability to capture and illustrate information and flows and engage viewers, video drives employee knowledge and productivity and accelerates businesses. Distributed organizations leverage video for better communication and collaboration, both domestically and globally. Video has also become a critical tool for sales and marketing teams to engage prospects, clarify messaging, illustrate solutions, and scale sales activities.

But what value does video actually create? What are the key driving forces propelling the use and adoption of video? How and why is it being used? What other organizational systems does it need to connect with? How does it support the latest trends in enterprise? And what role will it play in the future?

To answer these important questions, Kaltura undertook a comprehensive survey on **the state of video in the enterprise**. We received more than 300 responses, representing hundreds of organizations from diverse industries: technology, media and entertainment, healthcare and life sciences, retail, manufacturing, financial services, public sector and government, non-profits, and more. The organizations ranged in size from huge organizations of over 100,000 employees to very small organizations with fewer than 100 employees. Respondents represented various roles within the organization, including: IT, marketing, sales, operations, services, training, product, and R&D. We also conducted in-depth conversations with several respondents who agreed to participate in a deeper qualitative analysis.

Video is still a relatively new tool for many organizations, but we found that it is being used across the board in numerous use cases. According to respondents, employees watch on average seven hours of work-related videos per month, and in many organizations - where video has been expertly deployed - that number rises to more than 30 hours. Video is no longer just created centrally by specific departments, it has become a social communication tool: our survey found that a typical employee generates almost 3 hours of video per month, while some organizations estimated that their employees generate more than 20 hours a month.

Content varies widely from professionally produced marketing and brand promotion clips to employee-generated content, sharing best practices and producing how-to tutorials. On-demand video is the most widespread form used, but live video has an impressive presence as well. Video is already integrated into various organizational tools and social platforms but the survey found that it also deserves a dedicated outlet, in the form of an organizational YouTube-like video portal.

With estimations of video usage increasing by 50-200% annually, it's not surprising to see respondents firmly agree on the major role of video in the enterprise and its extreme value for connecting employees, celebrating corporate culture and boosting employee creativity. A strong confirmation was also expressed for the important role of video in marketing, brand awareness, increased sales and better customer support. Employees and customers in the digital era expect video to be included in their interactions within and outside the organization and want to see more use of it, across all use cases. They believe it will become a dominant way of communication and a required and essential skill.

I am extremely grateful to all the survey participants for their contribution. I am excited about the insights that we have learned from this survey, particularly around the positive ROI that video has for organizations. When more than 90% of respondents report that, in their

## Executive Summary

experience, video improves knowledge sharing, communications and product marketing, we know that video's growing role within organizations is assured.

I look forward to repeating this survey next year, and encourage you to provide feedback on any points that you would like to see explored in future research.

I also encourage you to join [our LinkedIn group](#) and collaborate with us as we define the next survey and help to shape the way organizations think about their video strategy.

Sincerely,

Dr. Michal Tsur, President, Kaltura Inc.



## 2. Methodology and Demographics

The survey was undertaken during February and March 2014. It was completed by more than 300 respondents. Each question had an average of around 200 responses.

For the purposes of this survey, the term “video” is defined as follows:

“Any use of moving images content that is streamed to desktops or mobile devices”.

This definition includes:

- Pre-recorded content;
- Live broadcasts;
- Meetings that have a shared viewing experience.

The breakdown of respondents by industry sector is as follows:

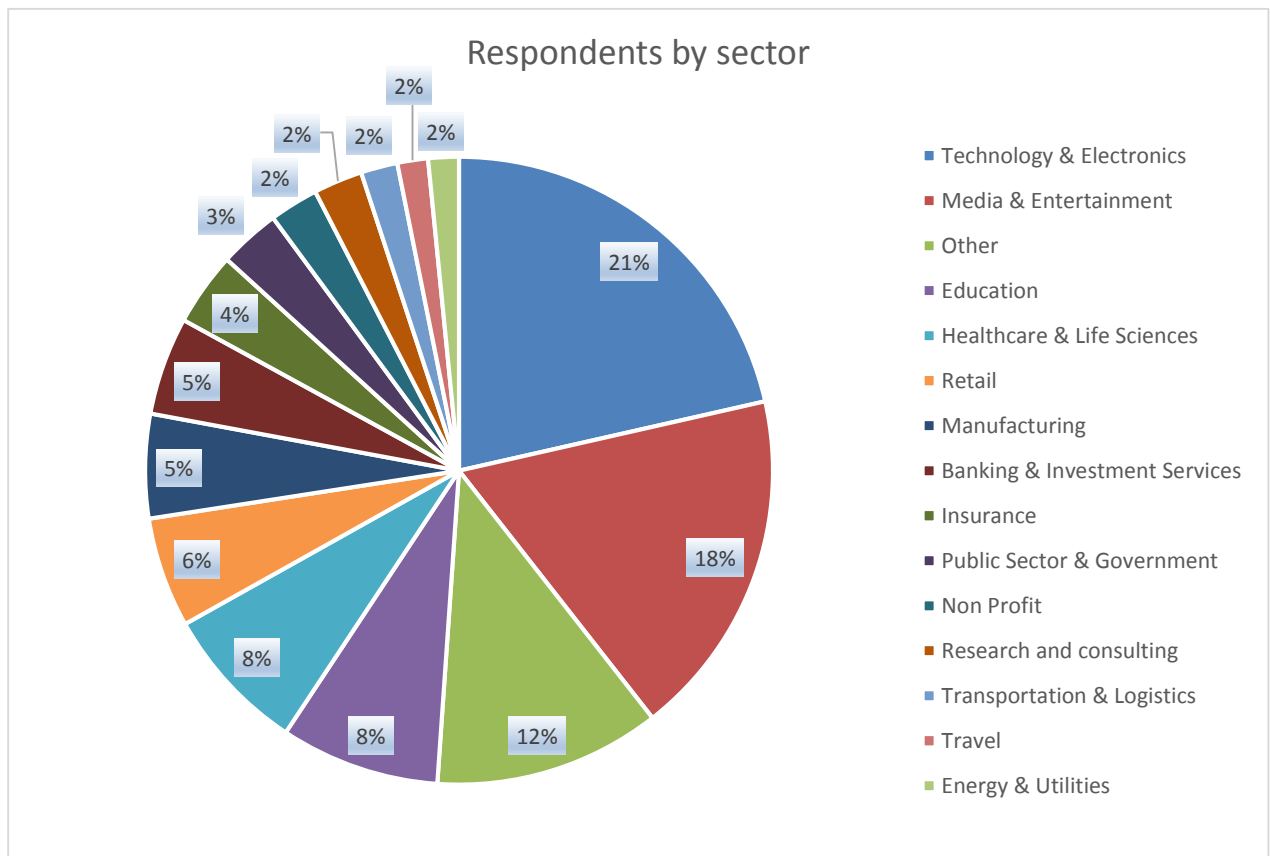


Figure 1: Respondents by sector

The companies varied in size, with the majority reporting up to 1,000 employees, but with substantial representation also for larger companies (11% of respondents reported more than 100,000 employees).

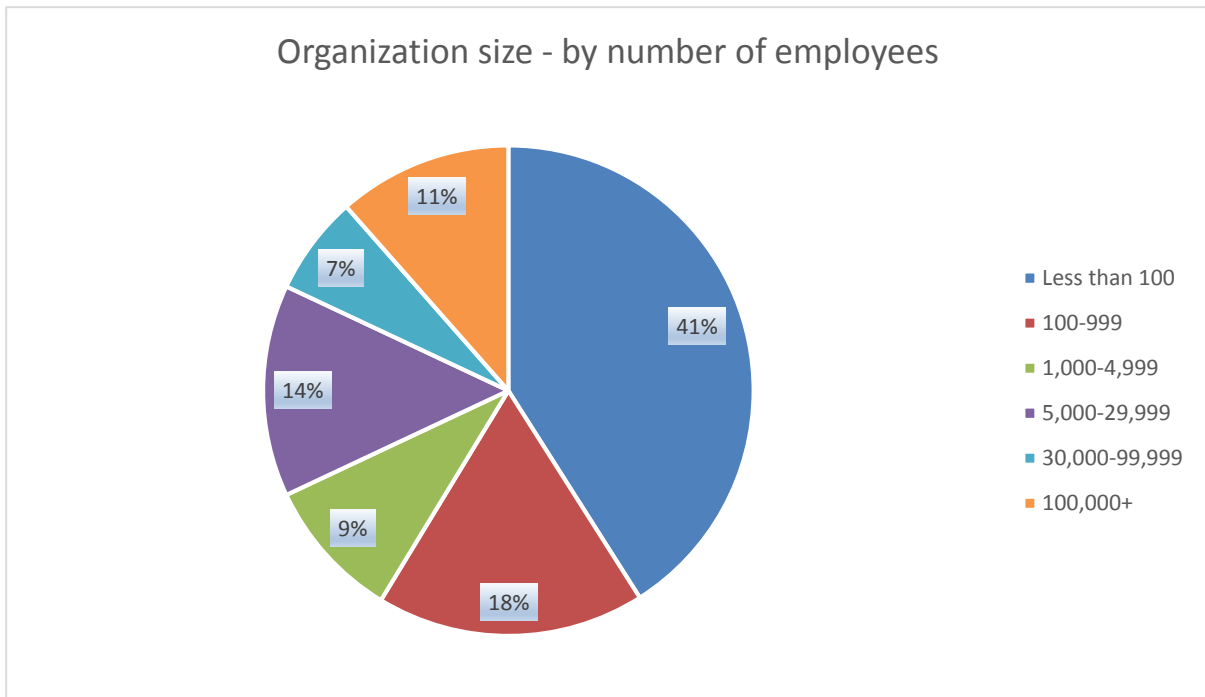


Figure 2: Organization size by number of employees

Respondents were from a variety of departments - mostly from IT, marketing, sales, operations and training & learning.

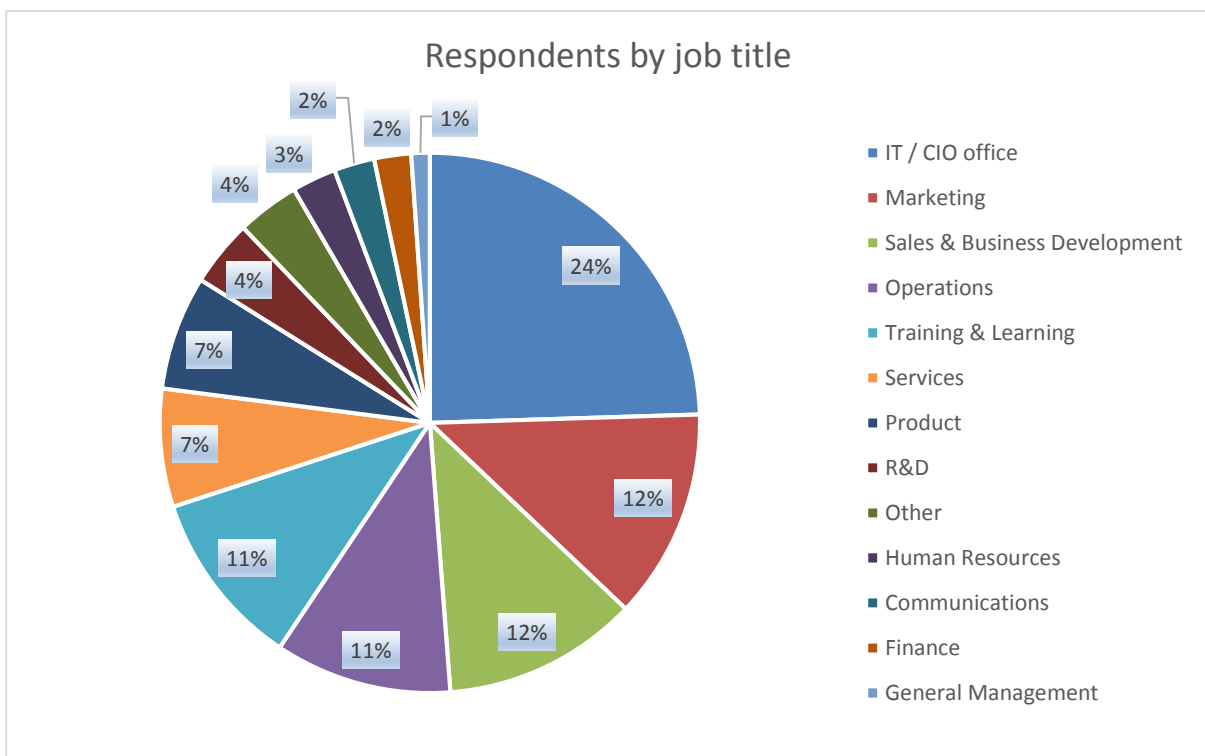


Figure 3: Respondents' department distribution



Finally, an element that may have significant impact on internal video usage: about two thirds of respondents report that their organization’s workforce is geographically dispersed.

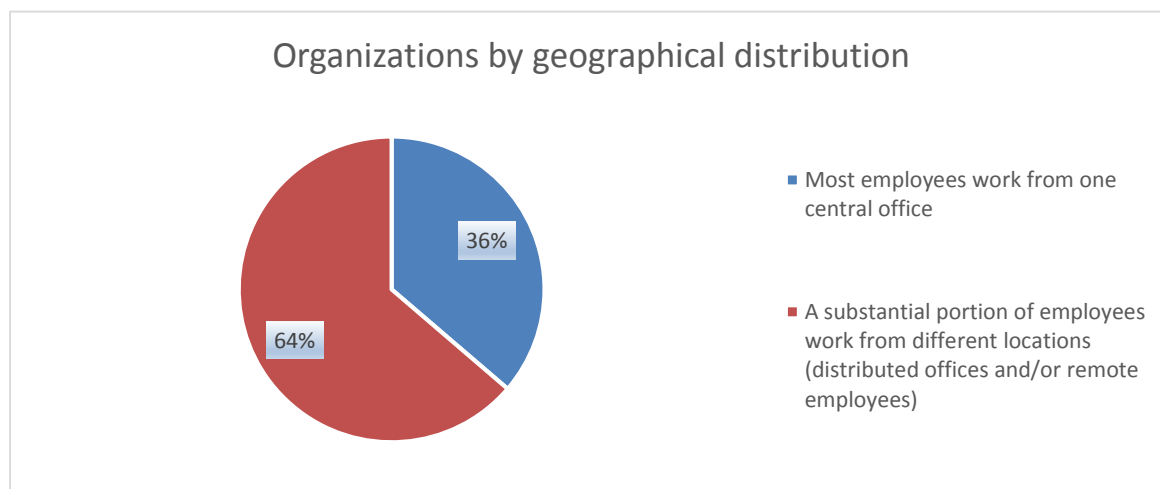
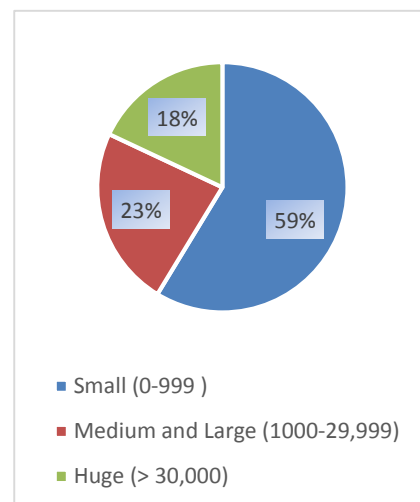


Figure 4: Organizations by geographic distribution

### Looking at Different Types of Organizations

During the analysis of the survey data we also looked at different types of organizations within the survey population and examined their responses in comparison to the general survey population and to each other. Of particular interest was the comparison between:

1. Organizations that are geographically dispersed (64%) and organizations that operate from a single location (36%)
2. Organizations with different sizes:
  - a. Small organizations (59%) – fewer than 1,000 employees
  - b. Medium/large organizations (23%) – 1,000 - 30,000 employees
  - c. Huge organizations (18%) - more than 30,000 employees



**Generally, we found that larger and Geographically Distributed Organizations make more use of video and find it overall more useful in all its forms and shapes, across all use cases.**

Further analysis showed that there is significant overlap between these two variables: the huge and large organizations were mostly geographically dispersed and the smaller organizations were mostly operating from a single location. We therefore report the results of these analyses in a combined manner.

### 3. Results

## Video Usage by Activity

VIDEO IS USED ACROSS THE BOARD IN THE ORGANIZATION, LEADING WITH USAGE IN MARKETING AND COMPANY EVENT COVERAGE

Video is used in many different ways by organizations. The most prominent uses are external, led by marketing and brand promotion videos (78%) and product and product marketing videos (77%). Video is also widely used for training - both externally for customers, partners and integrators (65%), and internally for employees (64%). While many of the internal videos are produced centrally - for example by executives for their communication (62%) and events coverage (67%) - there is also substantial room for employee-generated content (e.g. sharing best practices and how-to tutorials, 60%) and meetings (66%). Interestingly, the use of video is now also emerging in the areas of help desk / customer service and recruiting (37% and 35% respectively).

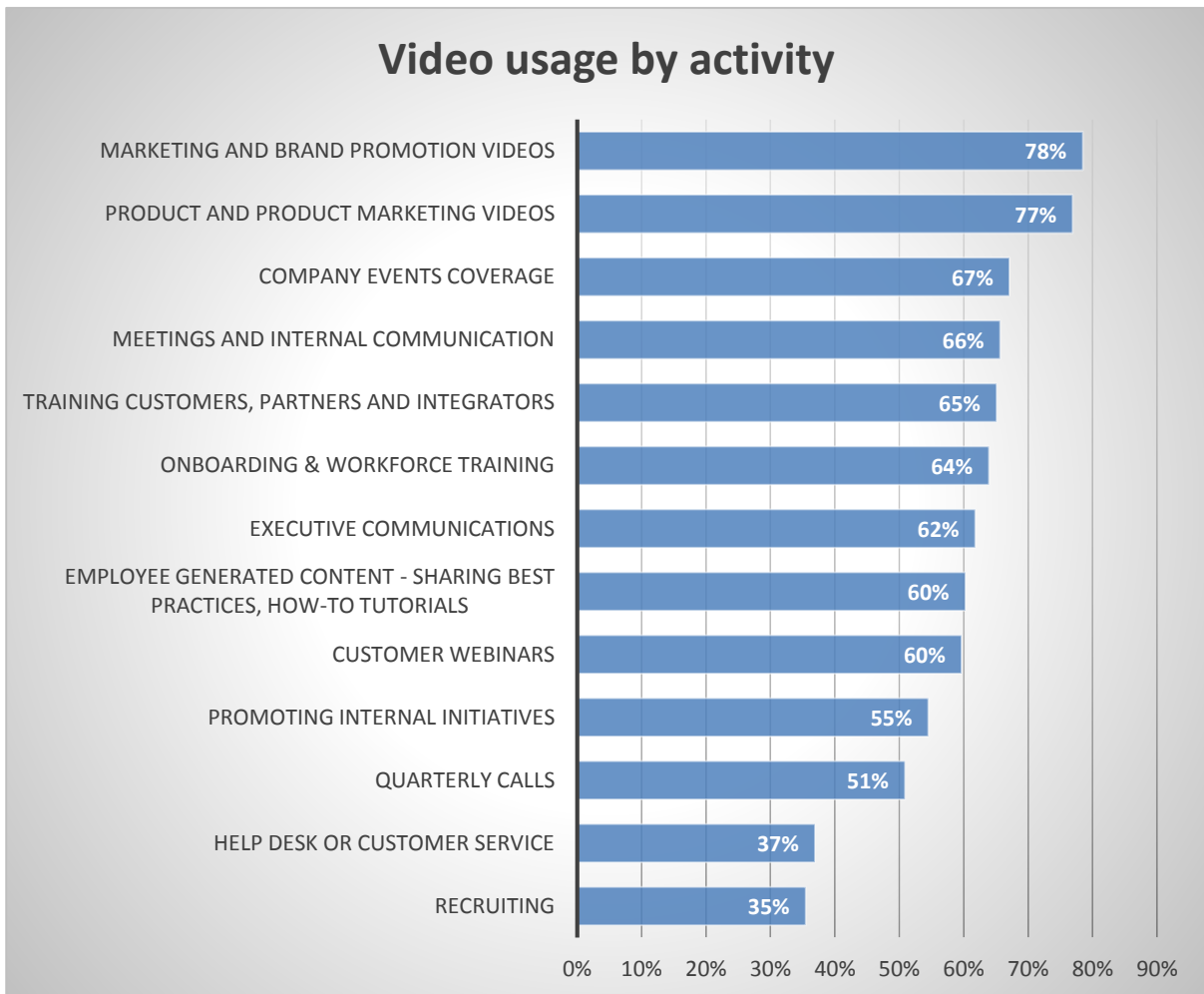


Figure 5: Video usage by activity

## Video Consumption and Creation

### Video Consumption

A TYPICAL EMPLOYEE WATCHES 7 HOURS OF WORK-RELATED VIDEO EACH MONTH. EMPLOYEES WORKING FOR LARGER ORGANIZATIONS AND GEOGRAPHICALLY DISTRIBUTED ORGANIZATIONS WATCH MORE

Estimates for the number of hours of work-related video a typical employee watches ranged from fewer than 5 (66%) to more than 30 (5%).

Calculating the weighted average using the middle of the range (e.g. for the 10-20 hours range, using 15), a typical employee watches 7 hours of work related video each month.

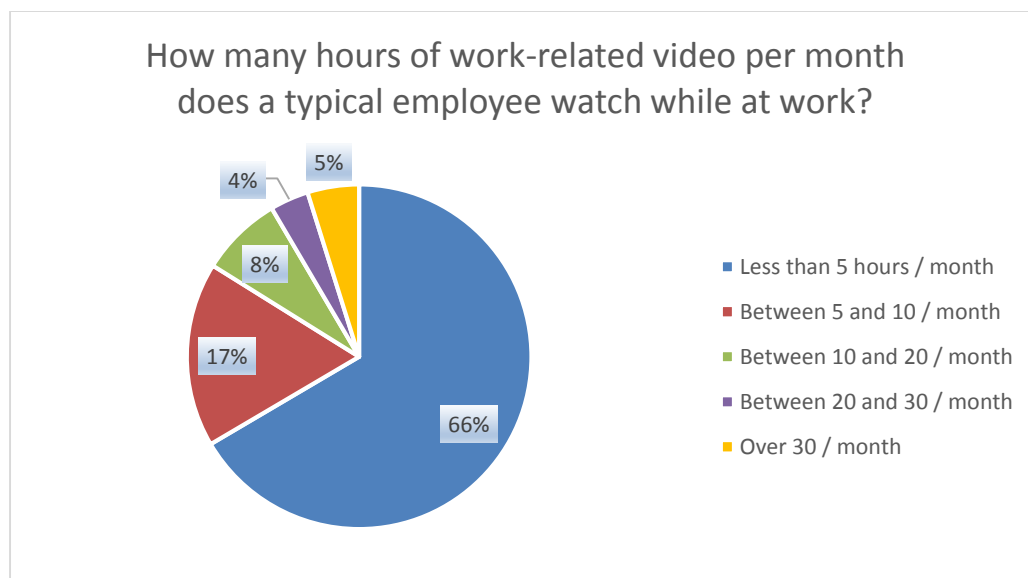


Figure 6: Video Consumption

Estimates for how many hours of video a typical employee watches per month are **higher for geographically distributed organizations** in comparison to organizations that are mostly located in one central office:

Category breakdown	Average hours of video watched per month by typical employee
Geographically distributed organizations	7.78
Single location organizations	5.09
General population	6.96

Table 1: Estimation of how many hours of work related videos a typical employee watches per month, comparison of single location and geographically distributed organizations

## Video Creation

**A TYPICAL EMPLOYEE GENERATES 2.9 HOURS OF VIDEO PER MONTH. EMPLOYEES WORKING FOR LARGER ORGANIZATIONS AND GEOGRAPHICALLY DISTRIBUTED ORGANIZATIONS GENERATE MORE**

When asked how many hours of video a typical employee generates per month (per the definition of video in the survey, this includes webcasting, how-to tutorials, meetings with shared screen, etc.), the majority of the respondents estimate under 2 hours. That said, there were 5% that estimated that a typical employee generates more than 20 hours of video per month, showing again that for some organizations video has become central to their activities.

Taking the middle range, the calculated average is that a typical employee generates 2.9 hours of video per month.

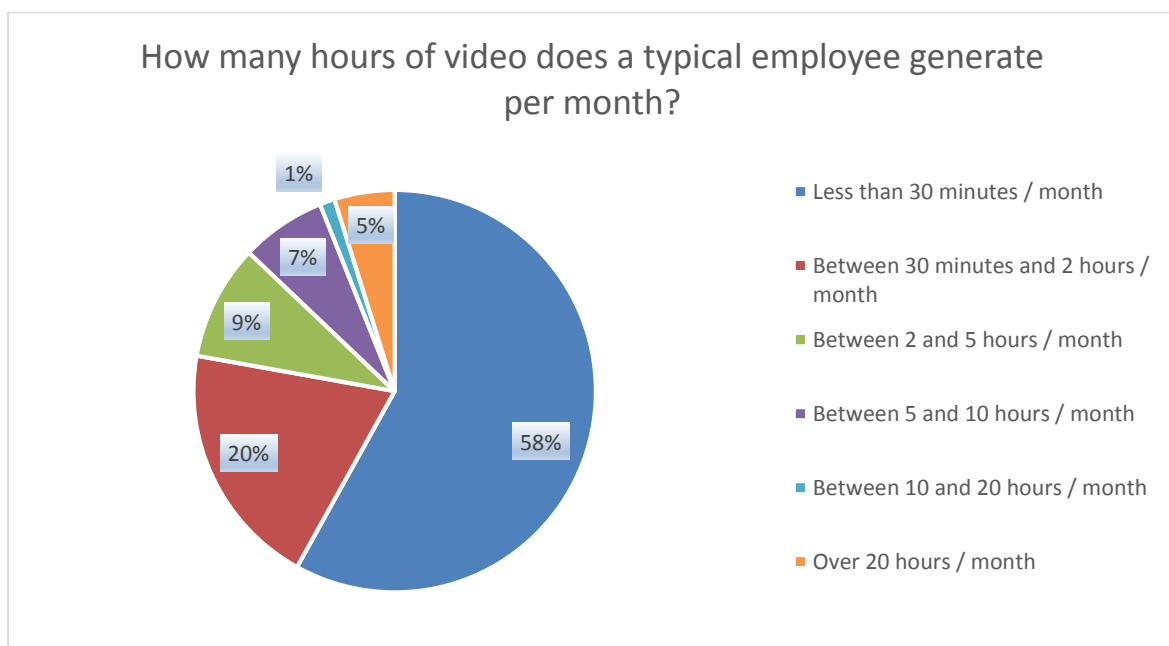


Figure 7: Video Creation

Small and medium-large organizations' estimates are lower than those of huge organizations, and estimates are significantly higher in geographically distributed organizations compared to organizations that are mostly located in one central office.

Category breakdown	Average hours of video created per month by typical employee
Small organizations	2.74
Medium and large organizations	2.69

Category breakdown	Average hours of video created per month by typical employee
Huge organizations	3.58
Geographically distributed organizations	3.32
Single location organizations	1.71
General population	2.86

Table 2: Estimation of how many hours of work related videos a typical employee generates per month, comparison of different types of organizations

## How Many Video Vendors

WHILE THE MARKET IS STILL FRAGMENTED, 41% OF ORGANIZATIONS ARE PLANNING TO CONSOLIDATE OR HAVE ALREADY CONSOLIDATED THE VARIOUS VIDEO COLLABORATION AND COMMUNICATIONS SYSTEMS. LARGER AND GEOGRAPHICALLY DISTRIBUTED ORGANIZATIONS TEND TOWARDS CONSOLIDATION

When asked about the number of vendors that their organization uses for their different video needs (including webcasting, webconferencing, telepresence, corporate video portal, town hall meetings, video-based training, marketing, etc.), respondents' answers varied widely, with an average of 4.4 and a median of 3.

When asked whether there is a plan to consolidate the various video collaboration and communication systems under a few centrally managed solutions, 41% of respondents stated that their organizations are planning to consolidate, or have already done so.

Geographically distributed organizations use more vendors than single location organizations: a median of 4 compared to 2. They were also more inclined to consolidate video solutions, with 45% planning to consolidate, in process or already consolidated, compared to 32% at single location organizations. The same trend is apparent when looking at larger organizations compared to smaller ones.



Figure 8: Video solutions consolidation

Category breakdown	No concrete plan	Planning to do it	In process of doing it	Already done
Geographically distributed organizations	55%	23%	16%	6%
Single location organizations	68%	19%	11%	2%
Small organizations	70%	18%	9%	3%
Medium and large organizations	46%	27%	22%	5%
Huge organizations	43%	25%	23%	9%
General population	59%	22%	15%	4%

Table 3: Estimation of plan to consolidate video vendors, comparing different organizations

## Integrating Video into Organizational Tools

THE CAPABILITY TO EASILY INCLUDE VIDEO IN ALL OF THE ORGANIZATION TOOLS WILL PLAY AN IMPORTANT ROLE IN THE NEAR FUTURE, WITH THE HIGHEST VALUE ATTRIBUTED TO INTEGRATION WITH SOCIAL PLATFORMS. THIS IS EVEN MORE APPARENT IN LARGER AND GEOGRAPHICALLY DISTRIBUTED ORGANIZATIONS

In the previous chapter we reviewed the overall video usage patterns. In this section we look into specific organizational tools, products and platforms, and examine the way video plays a role in relation to them.

Based on the results, integrating video into organizations' existing tools and applications is important: 75% of respondents agree or strongly agree that "the capability to easily include video in all of the organizations' tools (e.g. email, social business, instant messaging, etc.) will play an important role in the near future".

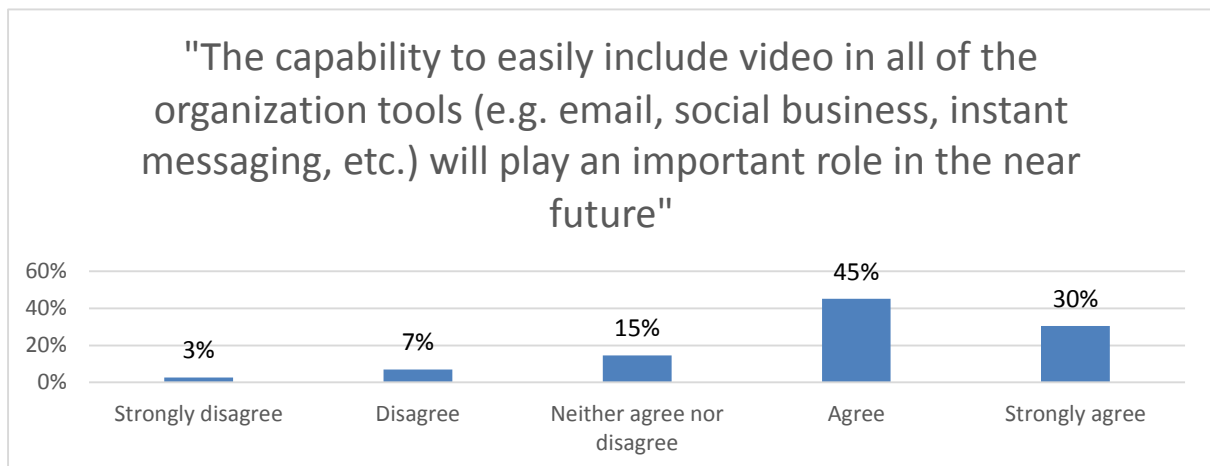


Figure 9: Importance of integration of video into all organization tools

Note that respondents from geographically distributed organizations agree with this much more than respondents from single location organizations, and the same is true for larger organizations:

Category breakdown	% agree or strongly agree
Geographically distributed organizations	83%
Single location organizations	63%
Small organizations	68%
Medium and large organizations	80%
Huge organizations	91%
General population	75%

Table 4: Importance of capability to easily include video in all of the organization tools



We then asked about the value of integrating video into specific solutions<sup>1</sup>. We can see that there is value in integrating with **all** of the mentioned platforms, led by the social business platforms, including SharePoint, Jive, IBM Connections and SuccessFactors, but also significantly with sales and marketing management solutions, content management tools, and learning management systems.

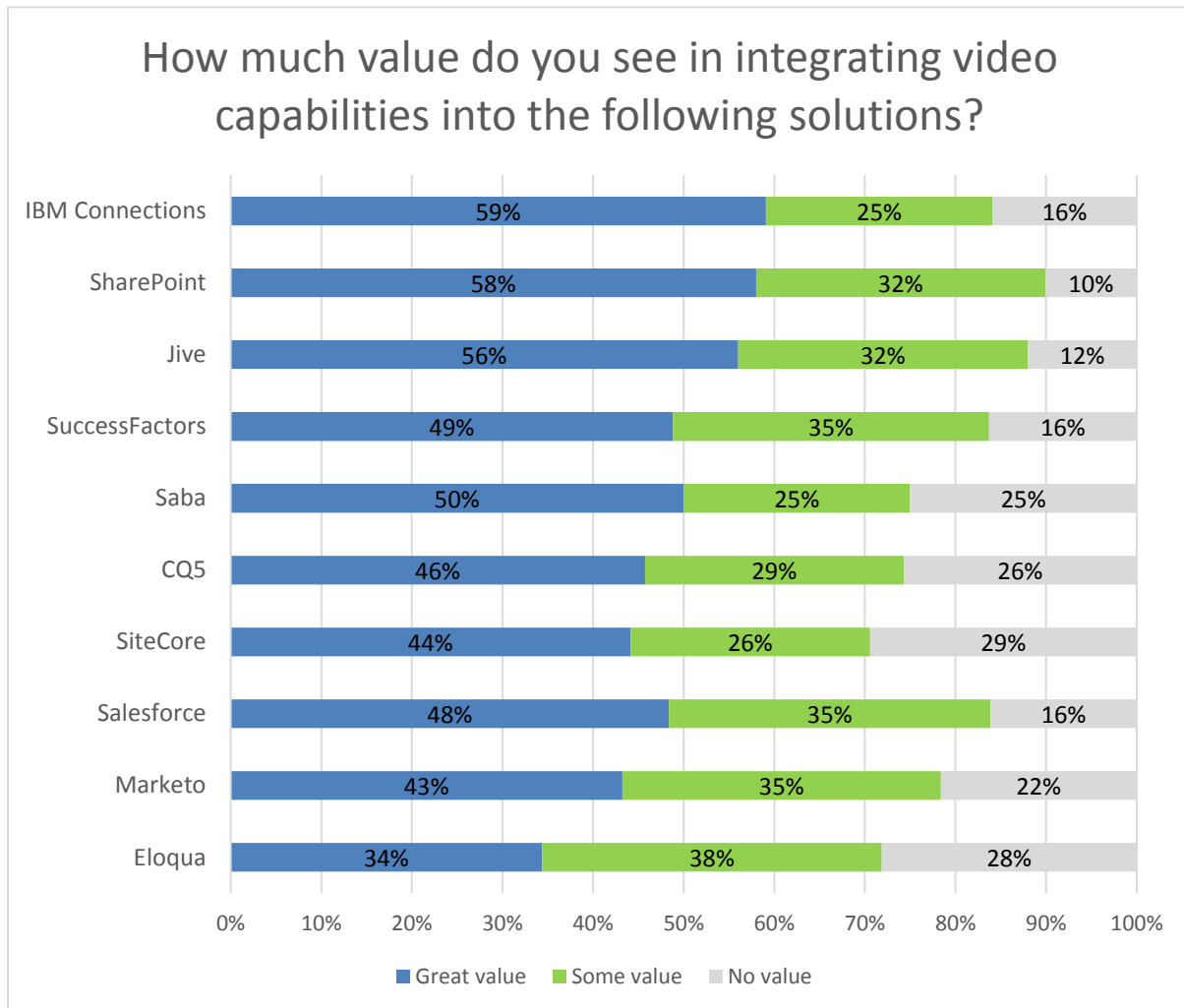


Figure 10: Importance of integrating video into specific enterprise solutions

In a follow-up question, asking what other solutions would benefit from adding video capabilities, more solutions were mentioned: Yammer, Confluence, Drupal, Moodle, HealthStream and Hubspot.

<sup>1</sup> Only a subset of respondents answered this more in-depth question, probably due to the fact that their organizations do not use all of the specific solutions mentioned.

## Video in Social Business Components

**USING VIDEO IN SOCIAL BUSINESS COMPONENTS WILL INCREASE THEIR ADOPTION**

With such overwhelming agreement on the value that video brings to social business components, it is interesting to see what kind of value it is expected to bring: Embedding videos within social business platforms (e.g. SharePoint, Jive, IBM Connections, Yammer) is **likely to increase user adoption** of these platforms according to 66% of respondents.

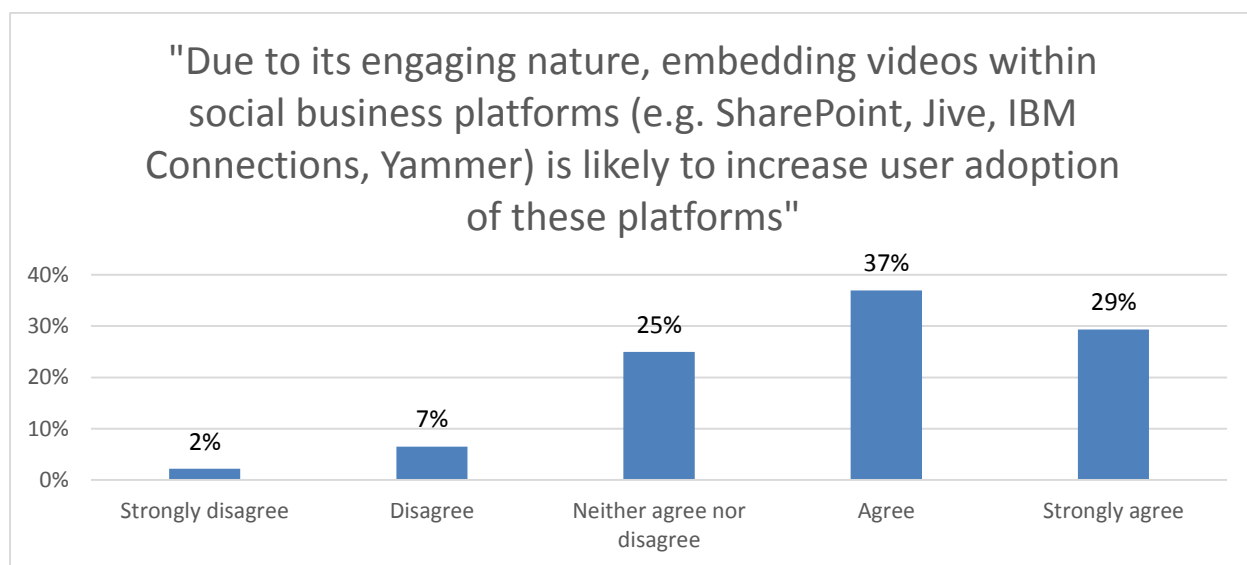


Figure 11: Adding value to social business platforms

Again, larger organizations and geographically distributed organizations see more value:

Category breakdown	% agree or strongly agree
Geographically distributed organizations	70%
Single location organizations	61%
Small organizations	60%
Medium and large organizations	68%
Huge organizations	83%
General population	66%

Table 5: impact of integrating video into social platforms, comparing different organizations sizes

When asked which social business platform components would be more valuable after video capabilities are added, more than half of respondents stated that announcements/posts, employee blogs and news feeds would be more valuable.

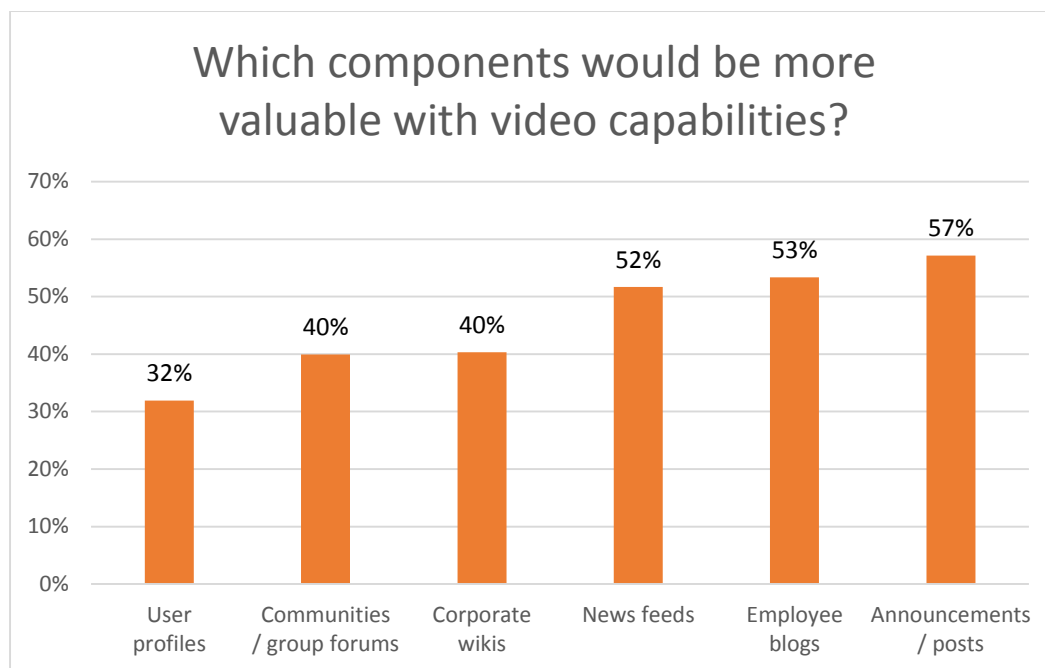


Figure 12: Specific social business components that would benefit from adding video

Once more, geographically distributed and larger organizations see more value in adding video capabilities to all the social business components.

Category breakdown	Announcements / Posts	Employee blogs	News Feeds	Corporate Wikis	Communities / group forums	User Profiles
Geographically distributed organizations	49%	45%	45%	35%	37%	25%
Single location organizations	32%	32%	29%	22%	18%	22%
Small organizations	32%	34%	29%	22%	22%	20%
Medium and large organizations	56%	41%	51%	37%	37%	20%
Huge organizations	57%	55%	52%	47%	45%	40%
General population	57%	53%	52%	40%	40%	32%

Table 6: Components that would be more valuable once video is introduced to them

## Standalone Video Portal

**THERE IS A CLEAR NEED FOR A STANDALONE VIDEO PORTAL, EVEN IF VIDEO BECOMES A PART OF THE EXISTING ENTERPRISE SYSTEMS**

When asked if they see value in a standalone enterprise video portal (an 'internal YouTube' or 'CorporateTube') assuming video creation and consumption capabilities were also available in all of their existing enterprise systems (e.g. CMS, LMS, Social business), 70% of respondents answered affirmatively.

Those that answered 'yes' commented mostly that it would serve as a centralized location for all videos across the different systems, facilitating video search and video management.

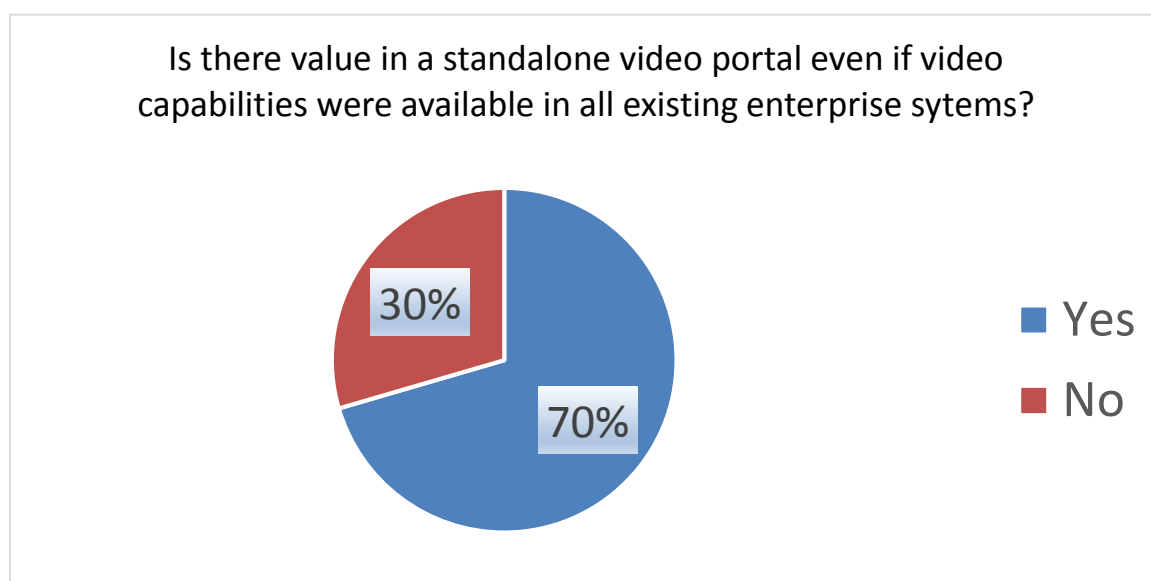


Figure 13: Value of a standalone video portal

Larger and geographically distributed organizations value a standalone enterprise video portal more:

	yes	no
Geographically distributed organizations	78%	22%
Single location organizations	57%	43%
Small organizations	62%	38%
Medium and large organizations	72%	28%
Huge organizations	91%	9%
General population	70%	30%

Table 7: Value of a standalone video portal

## Synchronous Online Meetings

**CENTRALIZED SOLUTIONS FOR SYNCHRONOUS ONLINE MEETINGS ARE PREVALENT, HOWEVER THESE TEND TO BE LACKING IN FUNCTIONALITY OR QUALITY**

### Centralized Solutions for Synchronous Online Meetings Status

More than half of respondents report that they have a centralized solution for synchronous online meetings of different sizes.

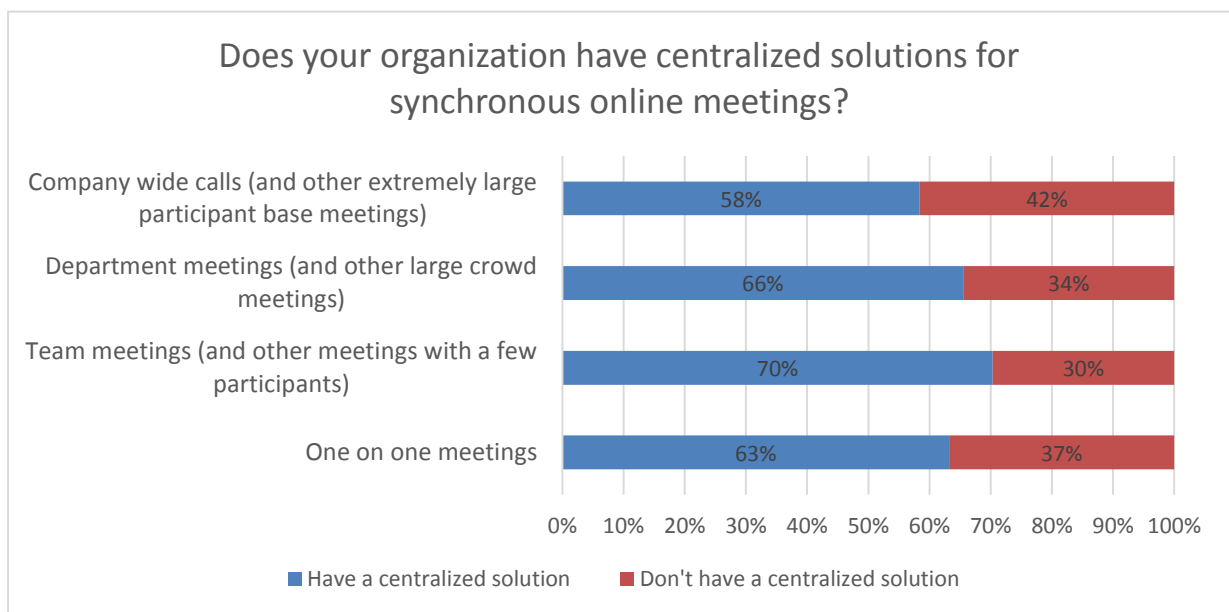


Figure 14: Synchronous online meetings - availability of Solutions

A bigger portion of geographically distributed organizations have solutions in place and the larger the organization, the more likely it is that they will have central solutions in place.

	One-on-one meetings	Team meetings (and other meetings with a few participants)	Department meetings (and other large crowd meetings)	Companywide calls (and other extremely large participant base meetings)
Geographically distributed organizations	65%	75%	73%	64%
Single location organizations	58%	60%	49%	45%
Small organizations	57%	62%	55%	46%
Medium and large organizations	65%	75%	71%	71%
Huge organizations	78%	88%	88%	78%

	One-on-one meetings	Team meetings (and other meetings with a few participants)	Department meetings (and other large crowd meetings)	Companywide calls (and other extremely large participant base meetings)
General population	63%	70%	66%	58%

Table 8: Percentage of respondents’ organizations that have a solution in place for different online meetings sizes

When asked about their satisfaction with the current solutions, it was apparent that respondents are less satisfied with their solutions for online meetings for larger audiences (for example, 57% of those that have a solution for one-on-one meetings evaluated it as working well, and only 41% of those that have a centralized solution for online company-wide calls say it is working well.)

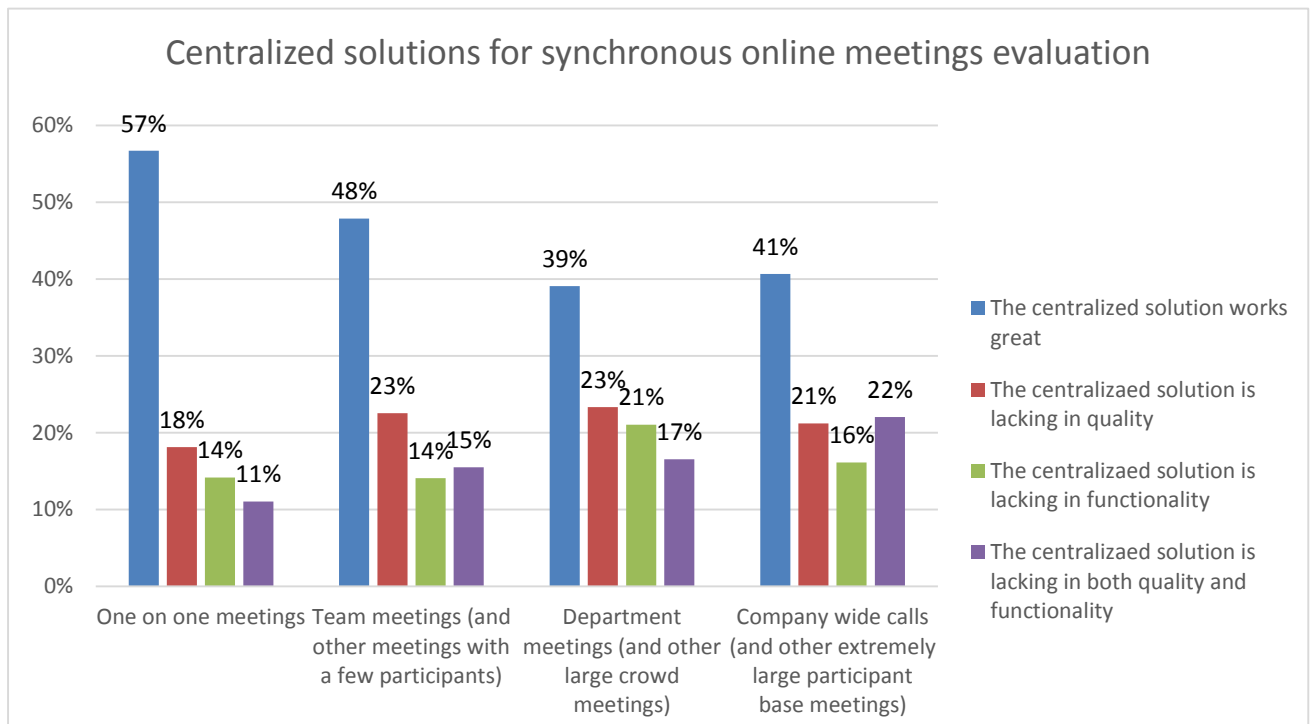


Figure 15: Level of satisfaction from synchronous online meetings solutions

## Video in Marketing

**VIDEO CONTRIBUTES TO MARKETING CAMPAGINS, IMPROVING CONVERSION AND HELPING IN LEAD QUALIFICATION**

With regards to video use in marketing, 70% of respondents agreed or strongly agreed that “there is a strong need for a video solution that effectively integrates video with marketing campaigns”.

It is interesting to note that respondents from customer-facing business units, including marketing and sales, agree with this statement more than the general survey population. We believe this provides extra validation to the value of video in marketing as this question touches their domain of expertise directly and therefore their response should be judged as

more insightful.

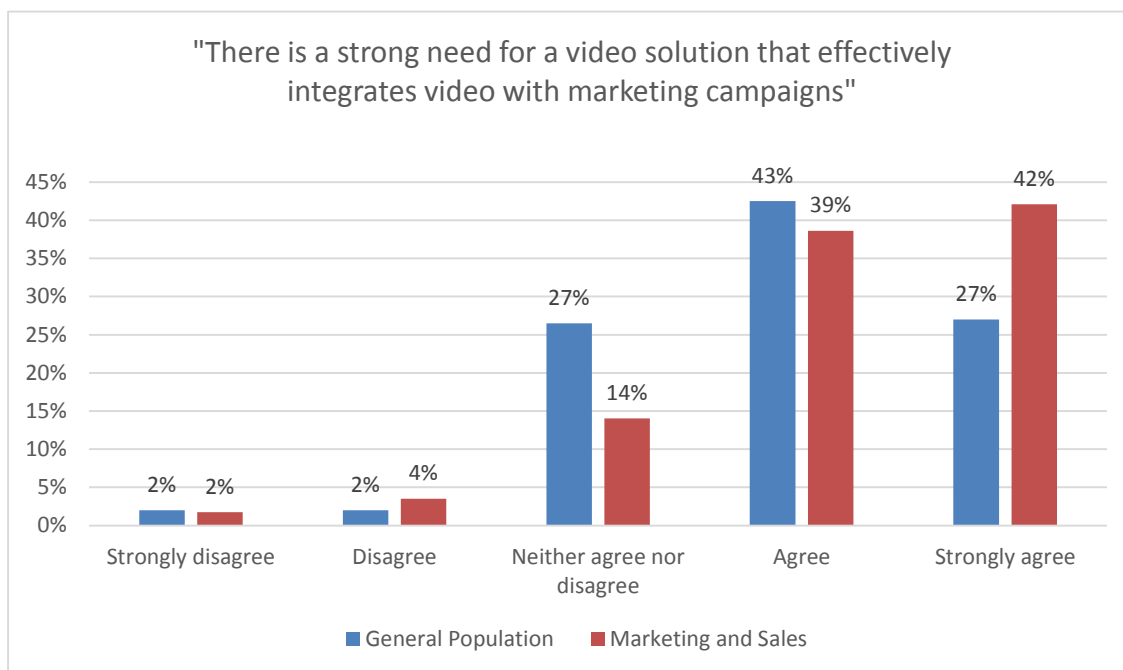


Figure 16: Need for a video solution in marketing campaigns

There is a similar agreement about the value it can provide with 66% of respondents agreeing or strongly agreeing that “including videos (optionally with call-to-actions) in marketing campaigns improves conversion rates”. Interestingly, 67% agree or strongly agree that “knowing the drop-off point from a marketing video could assist in lead scoring and qualification”. Again, marketing and sales people confirm this more strongly.

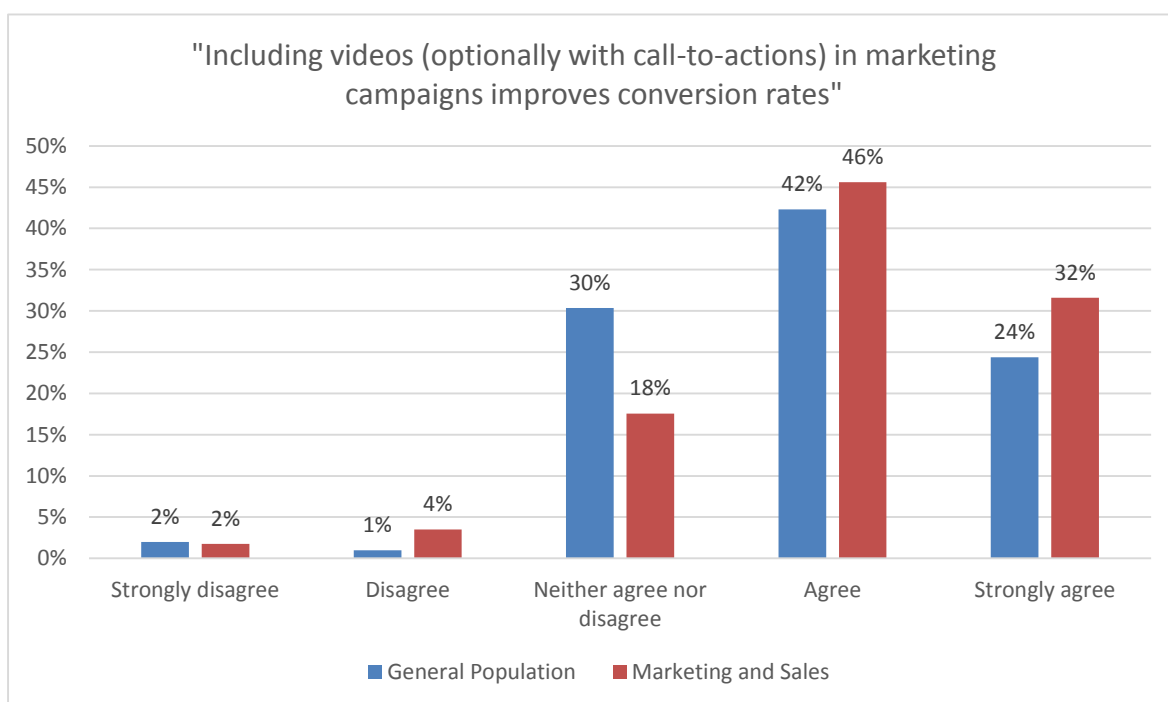


Figure 17: Video improves conversion rates



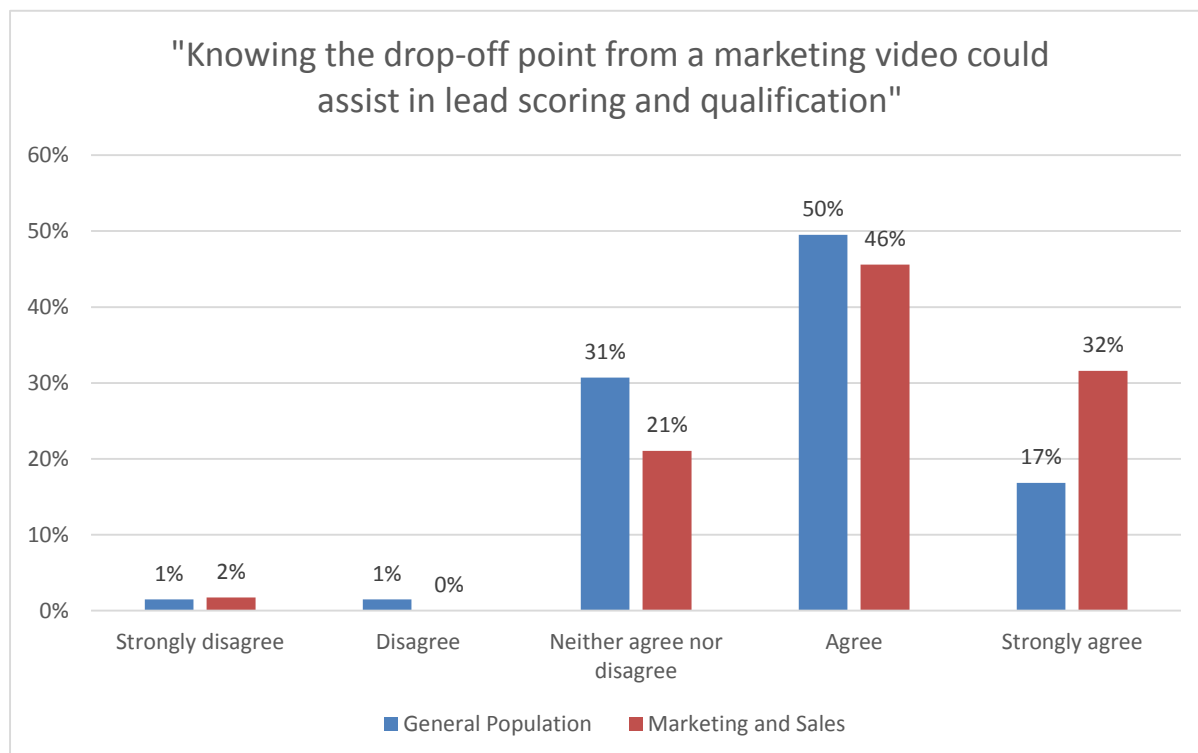


Figure 18: Information about video watching can help qualify leads

## Video for Training and Onboarding

THERE IS A HIGH INTEREST IN HAVING A VIDEO BASED LEARNING PORTAL, AS IT IS BELIEVED TO IMPROVE LEARNING RESULTS AND REDUCE COSTS. THE PORTAL WOULD BE VALUABLE EVEN IF THE ORGANIZATION USES AN LMS

### Benefits of a Video based Learning Portal for Training

Almost two thirds of respondents said they currently use video for training and onboarding (see Figure 5). When asked what results they are looking to achieve by utilizing video in training, respondents cited:

- Improve effectiveness and knowledge retention
- Improve engagement
- Reduce cost and bring higher efficiency
- Provide better reach and allow users to consume content when and how they want
- Deliver a consistent message and experience.

With those needs in mind, we asked about the value of having a video-based learning portal with assessment and accreditation. This was a question in which each respondent could mark one or more responses. The most important benefit attributed was “improving learning results”:

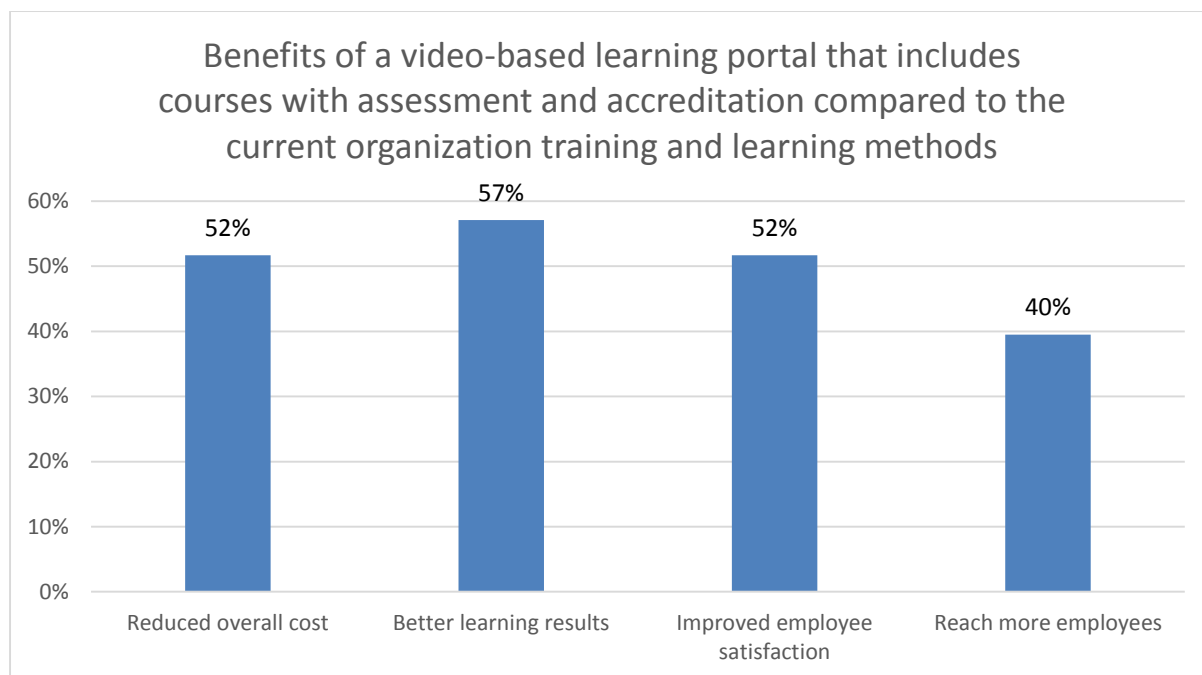


Figure 19: Benefits of a Video Based Learning Portal

### Video-based Learning Portal vs. the LMS

When asked how they envision a video-based learning portal in relation to the corporate LMS, most respondents see value in having both either as co-existing (45%) or embedded in each other (32%), whereas the rest believe either one or the other should be enough.

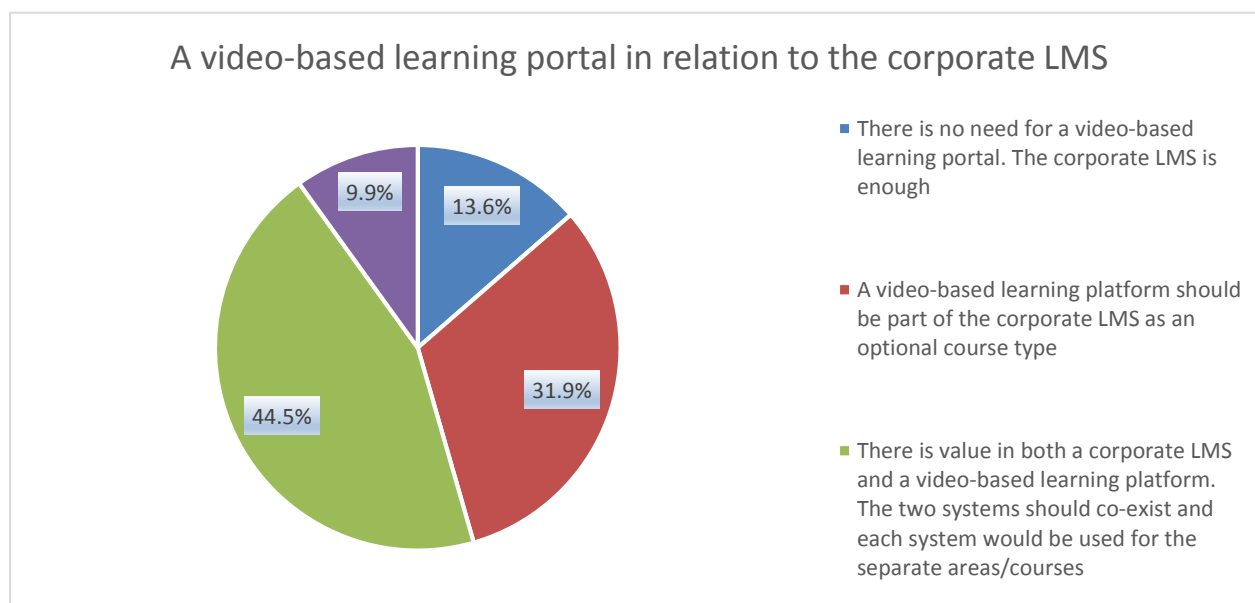


Figure 20: Video based learning portal vs. a corporate LMS

This trend towards needing both solutions was even stronger when looking at geographically distributed organizations and larger organizations (examine the middle columns in the table below):

	There is no need for a video-based learning portal. The corporate LMS is enough	A video-based learning platform should be part of the corporate LMS as an optional course type	There is value in both a corporate LMS and a video-based learning platform. The two systems should co-exist and each system would be used for the separate areas/courses	A video-based learning platform is the way to go. It should replace the corporate LMS
Geographically distributed organizations	10%	34%	48%	8%
Single location organizations	20%	28%	38%	14%
Small organizations	18%	30%	38%	14%
Medium and large organizations	6%	35%	50%	8%
Huge organizations	11%	32%	57%	0%
General population	14%	32%	45%	10%

Table 9: LearningTube versus LMS

### Interest in a Video-based Learning Portal

About 68% of participants say that their organization would be interested in a video-based learning portal; with about 40% of respondents interested in one for both internal and external training.

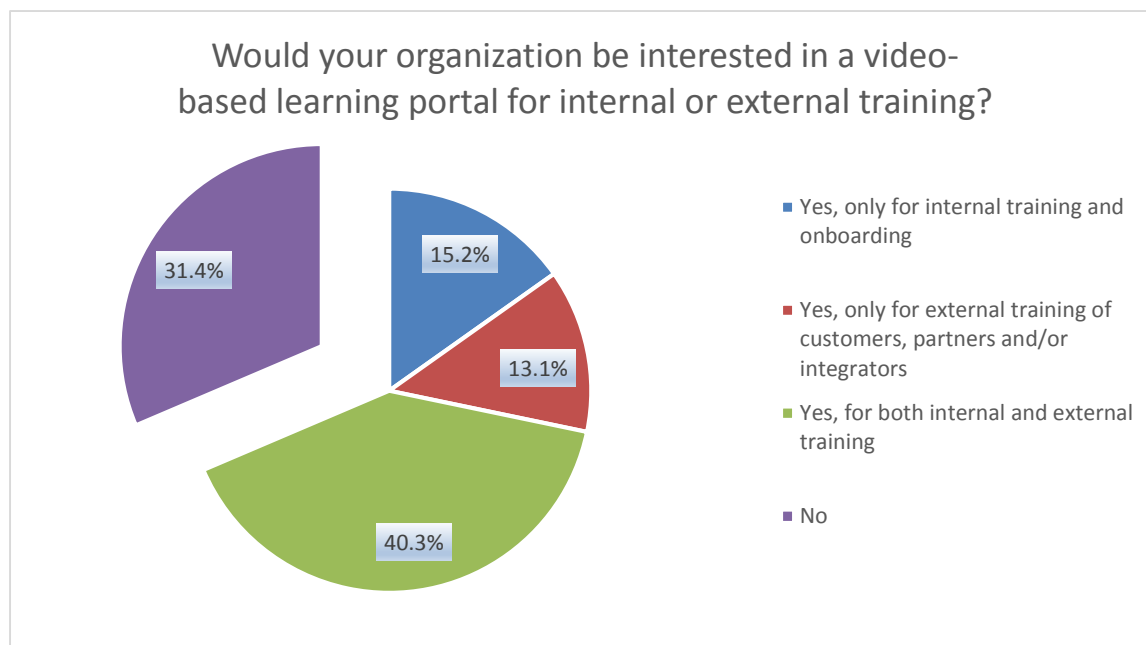


Figure 21: Interest in a video-based learning portal

## Live or VOD

**IN ALL USE CASES, EXTERNAL AND INTERNAL, VOD IS MOST WIDELY USED, EITHER EXCLUSIVELY OR IN COMBINATION WITH LIVE BROADCASTING**

For each use case, the respondents who use video for that use case also indicated whether they use live video, on-demand video or both.

Within the external use cases, the majority of organizations use either VOD only or a combination of live and VOD. Live only is rarer across all external use cases.

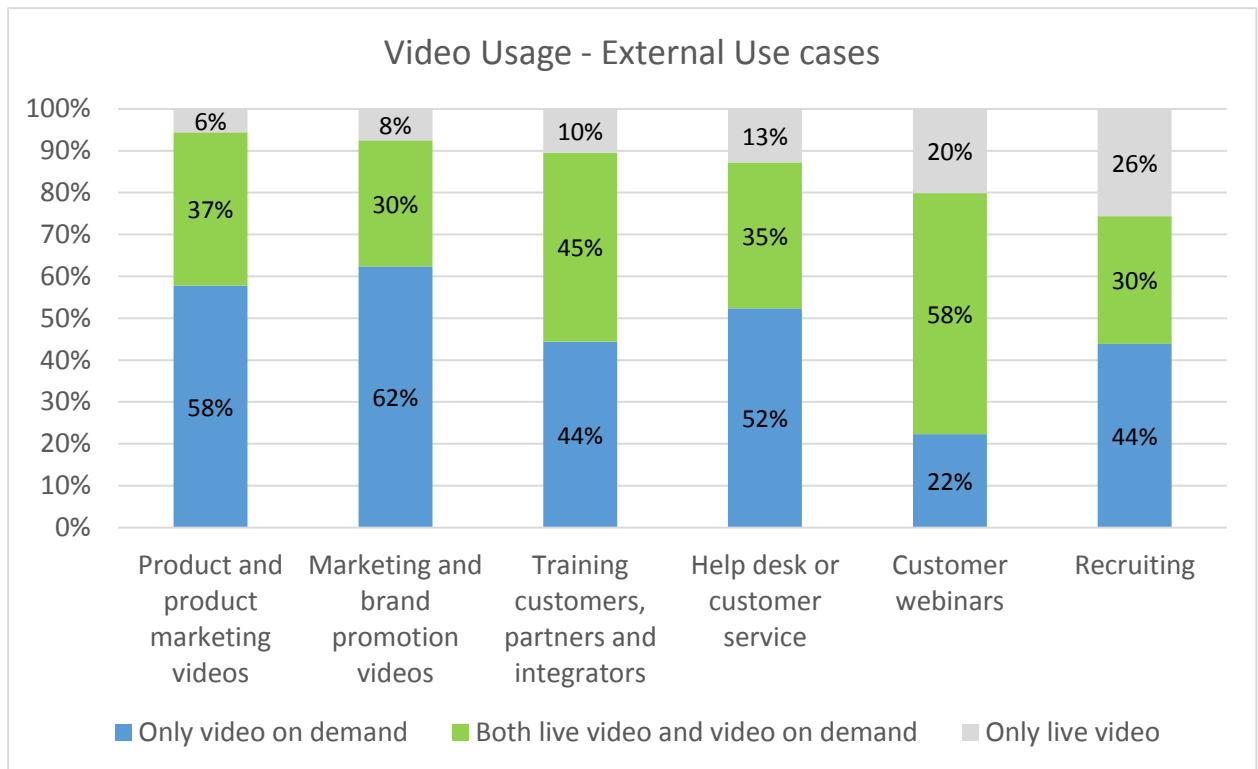


Figure 22: On demand and live video usage - external use cases

When we look at internal use cases, we see a similar picture of dominance of VOD or a combination of VOD and live, however there is more use of live video in some of the internal use cases (e.g. quarterly calls and meetings).

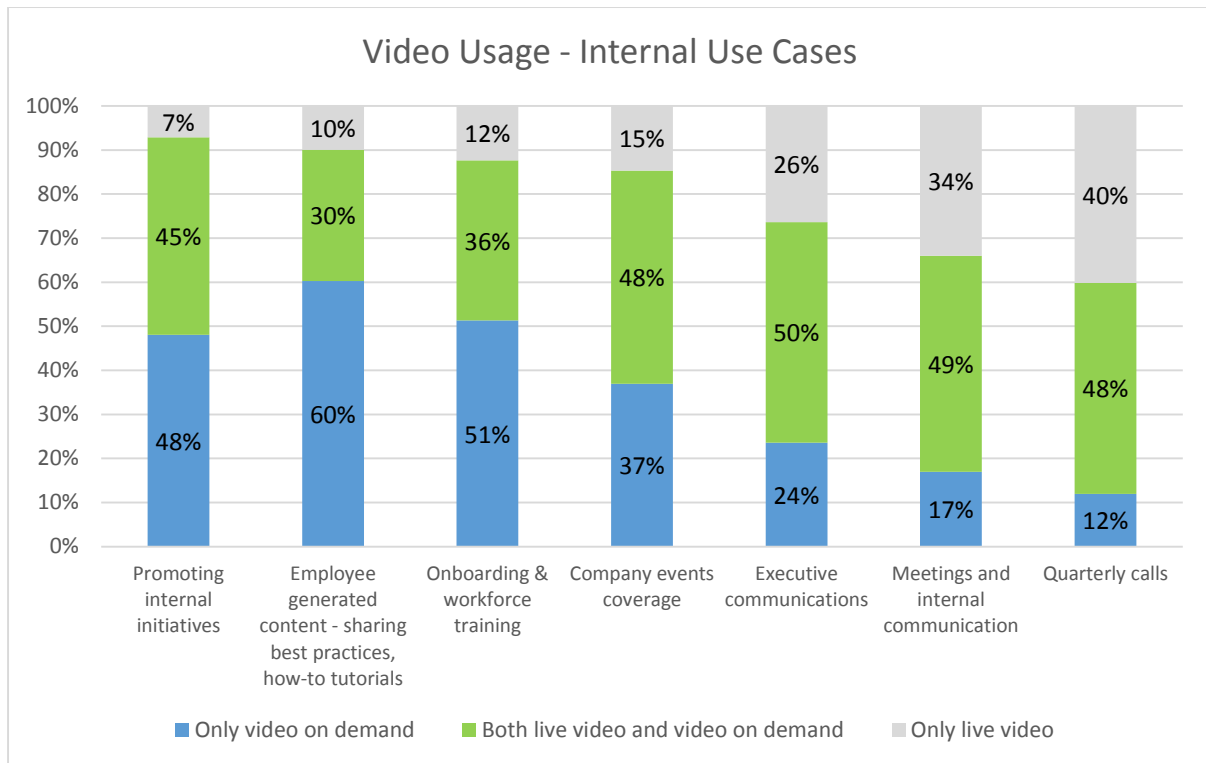


Figure 23: On demand and live video usage - internal use cases

## Usefulness of Recording Live Videos for Viewing On-demand

IT IS MOST CRITICAL TO RECORD TRAINING VIDEOS AND MAKE THEM AVAILABLE FOR ON-DEMAND VIEWING

When asked how useful it is to be able to record live video content and make it available on demand, 85% of respondents indicated that recordings of training and virtual classrooms would be very or extremely useful.

Recording webcasts and webinars for external audiences is considered by 70% of respondents to be extremely or very useful.

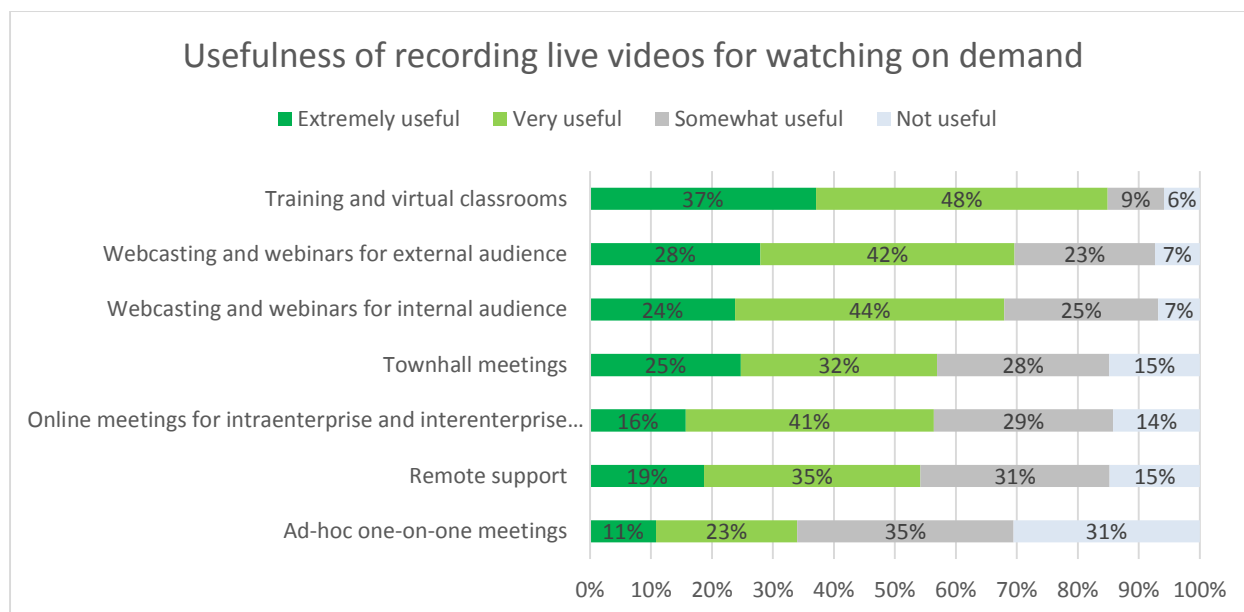


Figure 24: Usefulness of recoding live videos for watching on demand

Respondents from the geographically distributed organizations find more use in recording live broadcasts across all use cases. The largest difference was registered for webcasting and webinars for internal audience (26% difference) and town hall meetings (28%).

	Geographically distributed orgs	Single location orgs	% difference
Training and virtual classrooms	89%	78%	11%
Webcasting and webinars for external audiences	72%	65%	7%
Webcasting and webinars for internal audiences	77%	51%	26%
Remote support	55%	53%	2%
Town hall meetings	66%	38%	28%
Online meetings for intra-enterprise and inter-enterprise collaboration	61%	48%	13%
Ad-hoc one-on-one meetings	34%	34%	0%

Table 10: Percentage of respondents evaluating recording of live video content as very or extremely useful, comparison of single location and geographically distributed organizations

The larger the organization the more recordings of live video content are perceived as useful. Especially noteworthy are the differences for recording webcasting and webinars for internal audiences and town hall meetings.

An interesting exception is with regards to the usefulness of recording ad-hoc one-on-one meetings, where respondents from medium and large organizations evaluate it as significantly more useful than respondents from huge organizations.

95% THINK VIDEO IS VALUABLE FOR KNOWLEDGE SHARING, 93% FEEL IT IS VALUABLE FOR IMPROVING COMMUNICATION AND 92% FEEL IT IS VALUABLE FOR ENHANCING PRODUCT MARKETING

	Small organizations	Medium and large organizations	Huge organizations	% difference (huge-small)
Training and virtual classrooms	79%	92%	90%	11%
Webcasting and webinars for external audiences	64%	72%	83%	19%
Webcasting and webinars for internal audiences	54%	79%	90%	36%
Remote support	55%	46%	61%	5%
Town hall meetings	43%	67%	80%	37%
Online meetings for intra-enterprise and inter-enterprise collaboration	48%	69%	63%	15%
Ad-hoc one-on-one meetings	33%	42%	27%	-6%

Table 11: Percentage of respondents evaluating recording of live video content as very or extremely useful, comparison of different size organizations

## ROI and Impact of Video

### Value of Video in Organizational Goals

There is significant value in video in relation to a number of organizational goals. The biggest perceived value is for **knowledge sharing** with a total of 95% seeing video as somewhat or very valuable. Other goals such as improving communications, connecting employees, enhancing product marketing and boosting employee creativity follow closely.



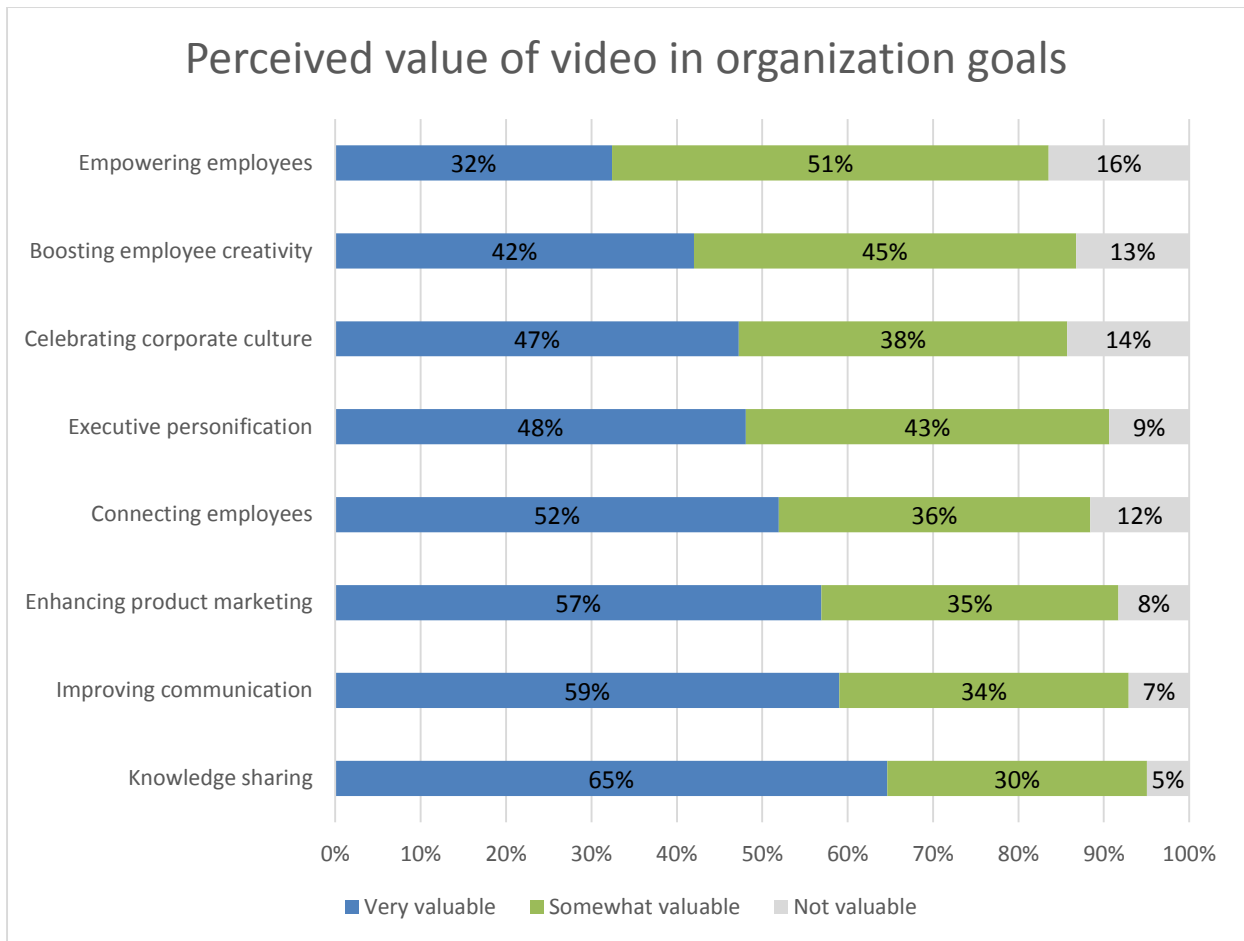


Figure 25: Value of video in organization goals

## Impact of Video

VIDEO HAS AN OVERWHELMINGLY POSITIVE IMPACT ON ALL INTERNAL USE CASES AND GOALS, IMPROVING TRAINING, COLLABORATION AND COMMUNICATION

### Internal Use Cases

The overall perception is that video has a positive impact on all internal use cases, from training employees faster and more cost effectively to improving collaboration and productivity of geographically dispersed team.

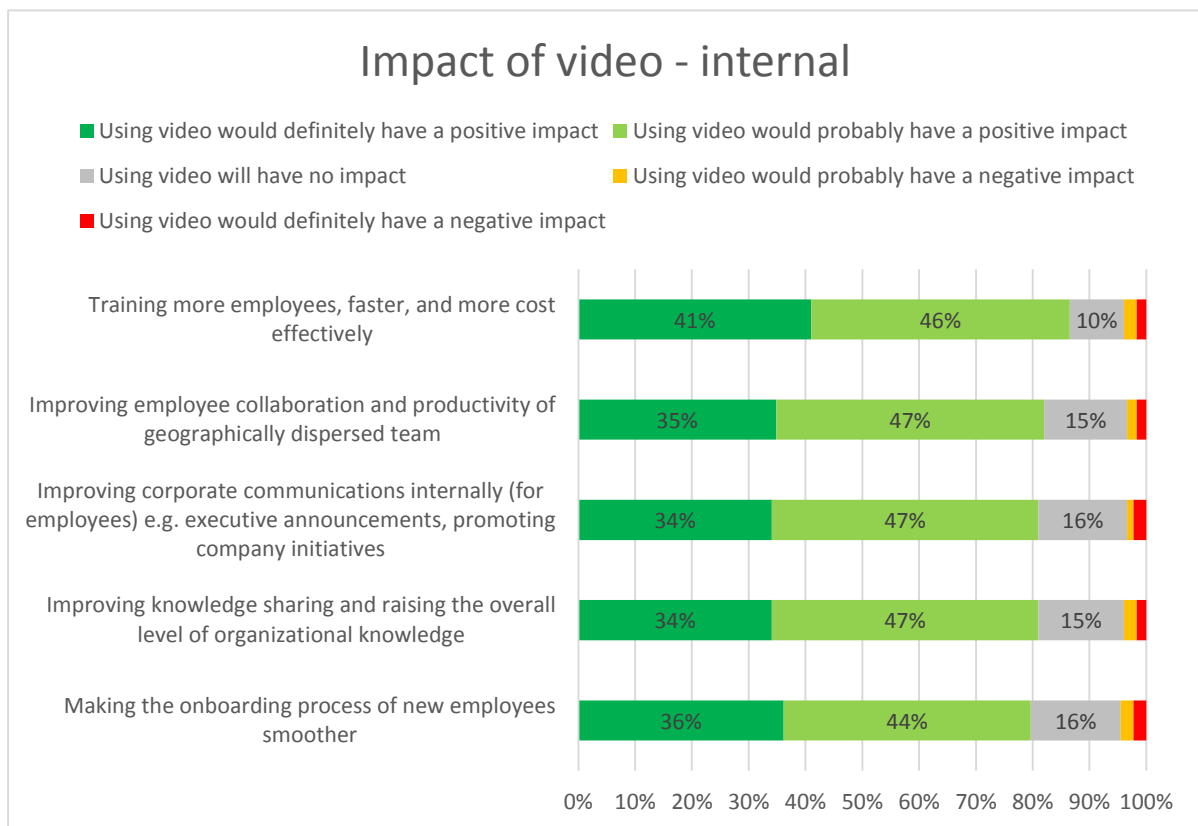


Figure 26: Impact of video on internal use cases

### Video Brings Executives and Employees Closer

Part of the positive impact in the internal use cases can be attributed to respondents' perception of the way video enhances the intra-enterprise communication: 80% of respondents agree that "videos puts a face, a voice and character to both executives and employees and helps employees better relate to their leaders as well as identify natural leaders and stars across the company".

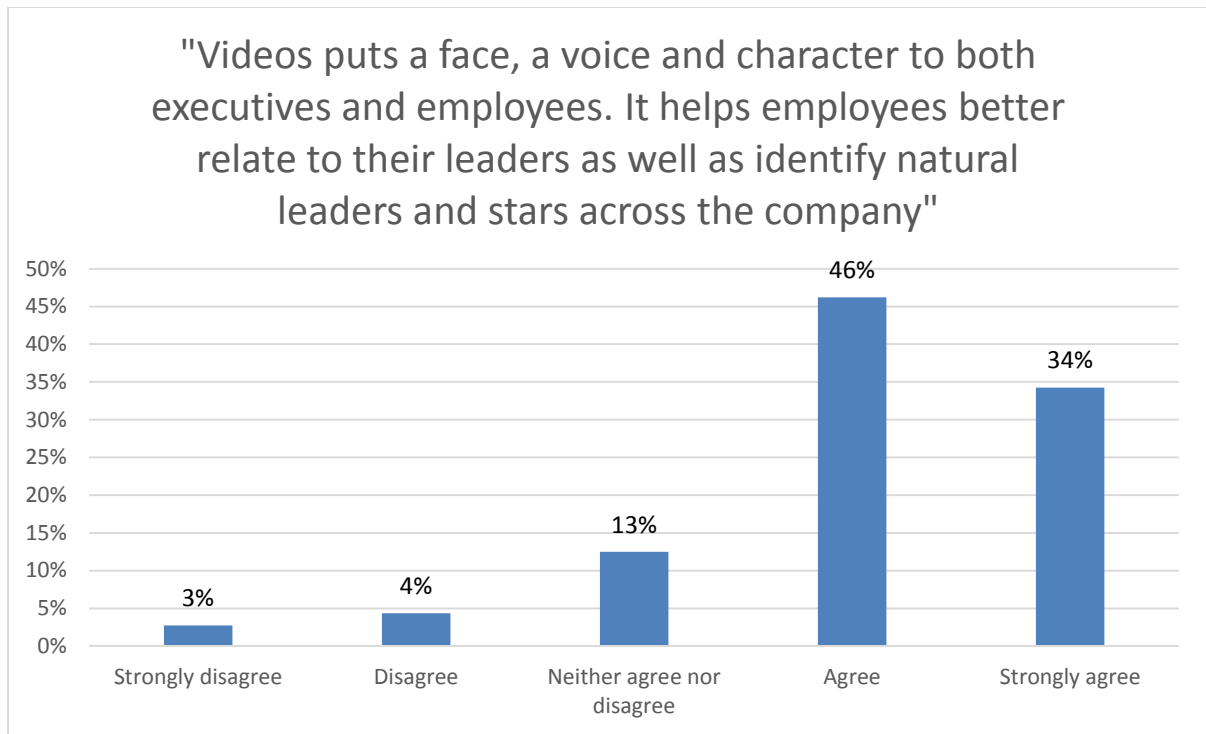


Figure 27: Impact of video on the voice of employees

*"I see it as one of the most powerful positive forces in large, international organizations, in which currently, the lack of interpersonal engagement between employees (especially within organic teams) that are remote from one another is harming collaboration (due to them not seeing one another and therefore not fostering trust building dynamics that breed relationships which are the most important foundation for collaboration)"* wrote a Co-Founder of a small Training and Consulting organization.

**Video is Essential**

70% of respondents agree that "video is essential for internal communication, knowledge sharing and collaboration in large organizations".

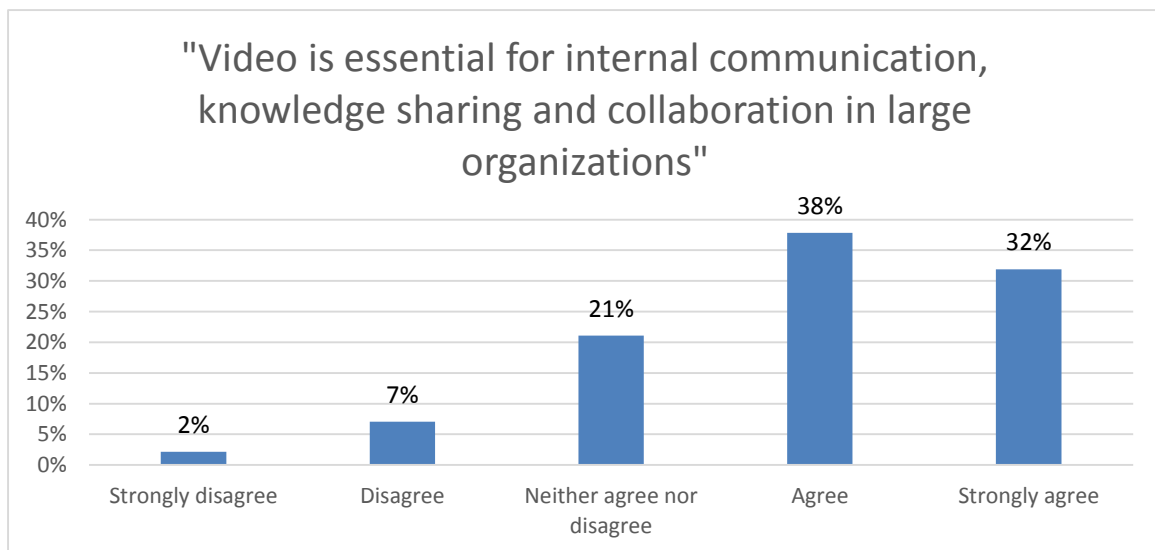


Figure 28: Video is essential

### Video is Powerful

76% of respondents agree that “video provides a nearly in-person experience and makes messages powerful in a way that written communication cannot. It is instrumental in connecting geographically divided people in the company”.

**“I see video creation and consumption growing in all areas of business. The tools for creation of videos are becoming more cost effective so organizations need to provide a vehicle for others to share videos.”** Wrote a Media Services Manager in a very large manufacturing organization

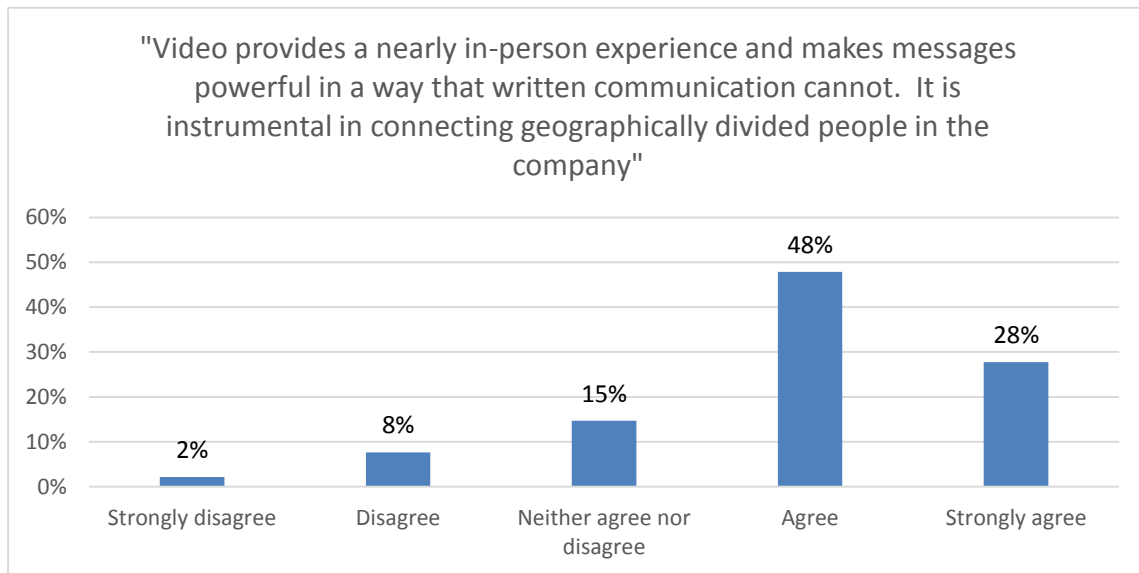


Figure 29: Video is instrumental in connecting people

### External Use Cases

The same overall enthusiasm exists in relation to the external use cases as well, from marketing and increased brand awareness to selling products online.

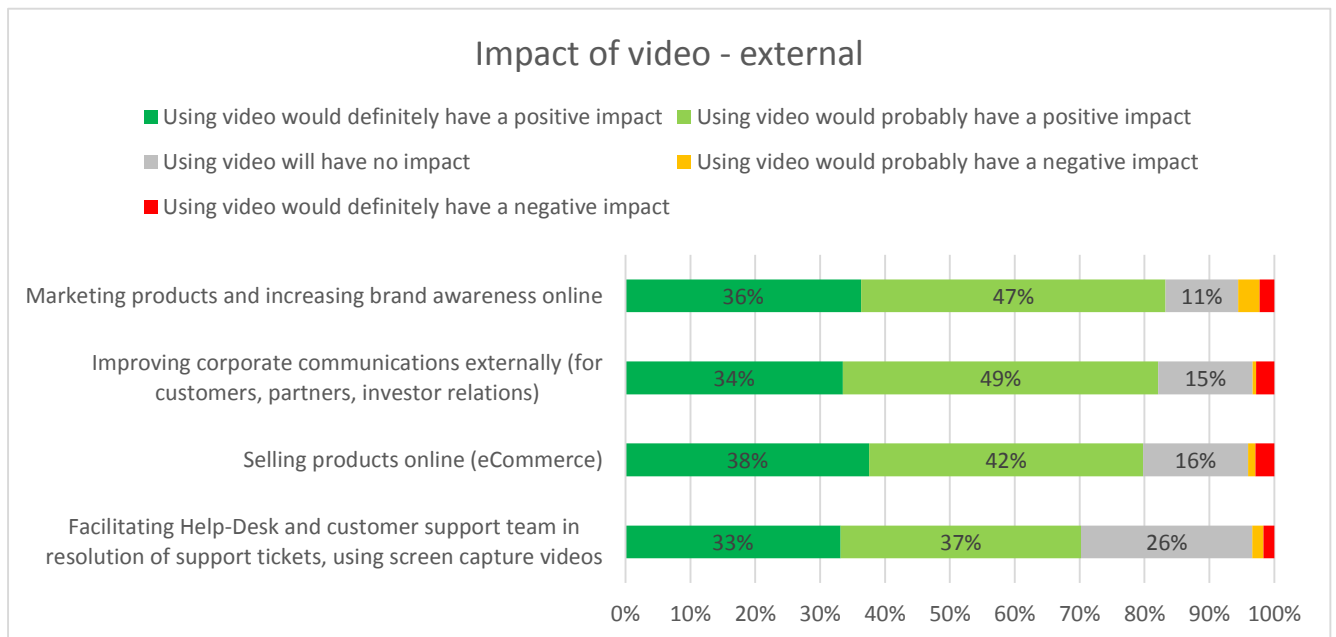


Figure 30: Impact of video - external use cases

## ROI for Different Types of Organizations

GEOGRAPHICALLY DISTRIBUTED ORGANIZATIONS AND LARGER ORGANIZATIONS SEE MORE VALUE IN VIDEO ACROSS ALL ORGANIZATIONAL GOALS, AND SEE A HIGHER POSITIVE IMPACT ON ALL INTERNAL AND EXTERNAL USE CASES

Further analysis showed that, across the board, geographically distributed and larger organizations see more value in video. The detailed tables showing the differences between the groups when it came to the value of video are brought in the Appendix, section 0

## Buyers Guides – Important Features

WHEN CHOOSING AN ENTERPRISE VIDEO SOLUTION OR A WEBCASTING SOLUTION, EASE OF USE IS THE MOST IMPORTANT ELEMENT. HUGE ORGANIZATIONS CARE LESS ABOUT THE PRICE AND CARE MOST ABOUT SECURITY AND GRANULAR PERMISSION CONTROL; MEDIUM AND LARGE ORGANIZATIONS VALUE RELIABILITY THE MOST.

Throughout the survey the respondents were asked to rank different features that are important to consider when acquiring a video solution in general, and specifically video solutions for webcasting and for a video-based learning portal.

### Choosing an Enterprise Video Solution

When asked to rank the importance of different criteria when choosing a video solution, the most important<sup>2</sup> criterion was ease-of-use, followed by price. Note that for #3 and #5 two criteria were ranked equally.

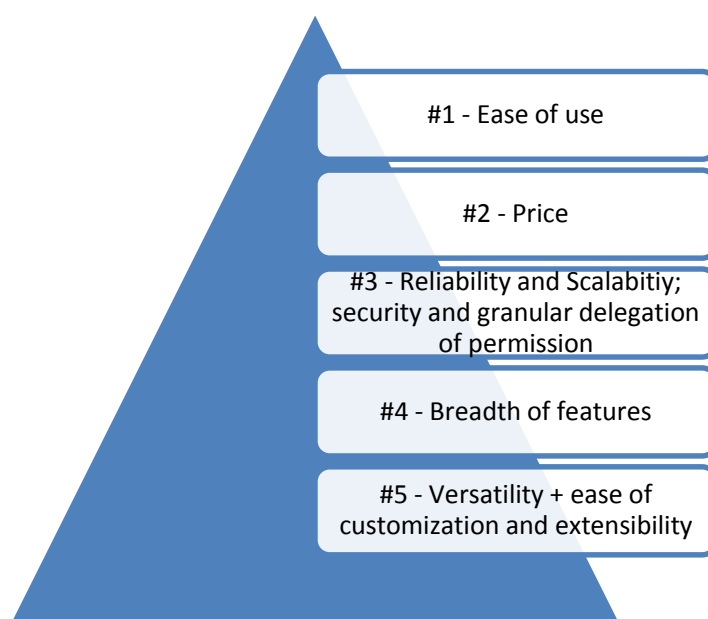


Figure 31: Most important features in an enterprise video platform

When looking at organizations from different sizes, the different groups, the general order remained the same with the following differences:

<sup>2</sup> We have aggregated the results using different scoring systems including incremental, growing steps, exponential and incremental with emphasis on the top 2 ranks and in all the different systems the overall ranking results remained as reported

## Results

- Respondents from medium and large organizations rank 'Reliability and scalability' as more important than 'Price' (both still following 'Ease of use')
- Respondents from huge organizations rank 'Security and granular delegation of permission' as the most important, followed by 'Ease of use' and 'Reliability and scalability' as the 2<sup>nd</sup> to 3<sup>rd</sup> most important criteria and 'Price' drops to 4<sup>th</sup> place.

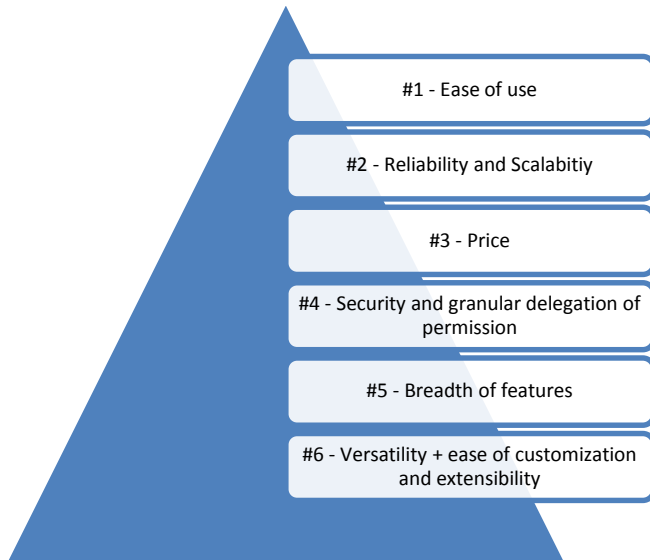


Figure 32: Most important features in an enterprise video platform – medium and large organizations

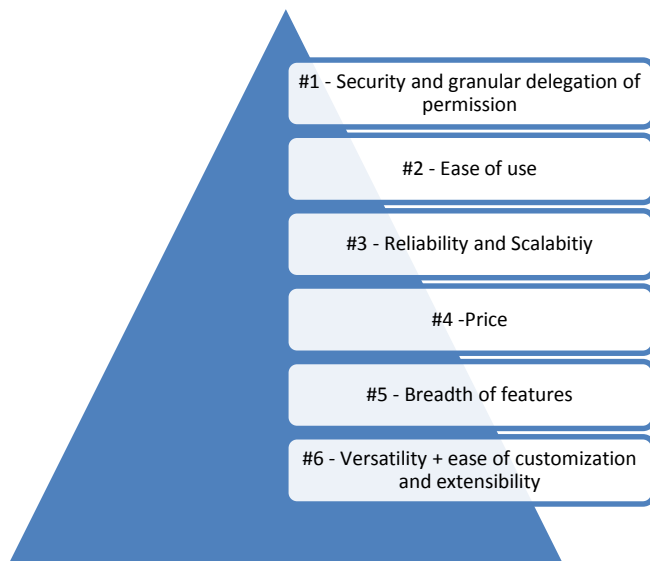


Figure 33: Most important features in an enterprise video platform – huge organizations

## Choosing a Webcasting Solution

When asked to rate the importance of high level requirements from a webcasting solution, the most important requirement is 'ease of use for presenters and participants' with 87% of respondents rating it as extremely or very important.

The use of mobile devices is still emerging with regards to webcasting, respondents rated as extremely or very important the ability to watch on mobile devices (62%). Furthermore, broadcasting from mobile devices was considered by 40% of respondents as very or extremely important.

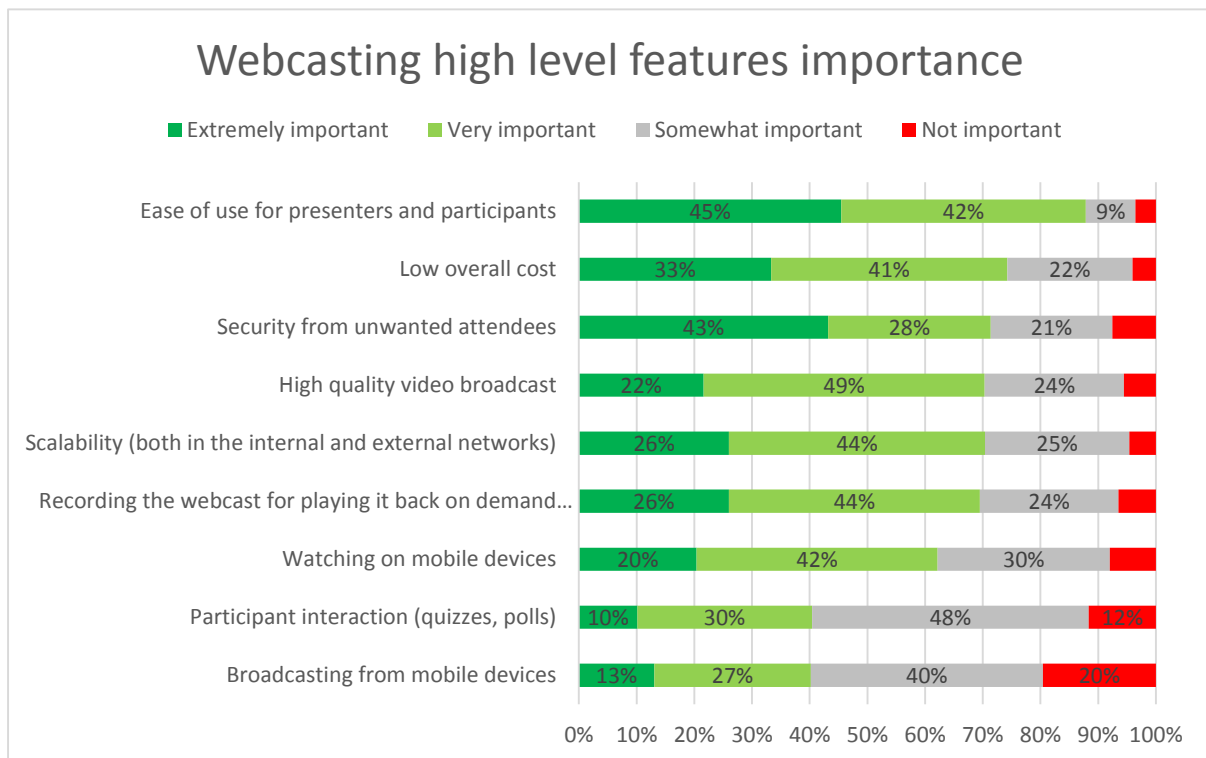


Figure 34: Importance of webcasting features

## Choosing a Video-based Learning Portal

**CURRICULUM STRUCTURE IS IMPORTANT FOR A VIDEO-BASED LEARNING PORTAL, ACCREDITATION IS NOT**

According to the survey participants, the most important feature in a video-based learning portal is curriculum structure, which allows a learner to continue where they left off, followed by analytics. Interestingly accreditation and social features that allow interaction were not rated as highly.



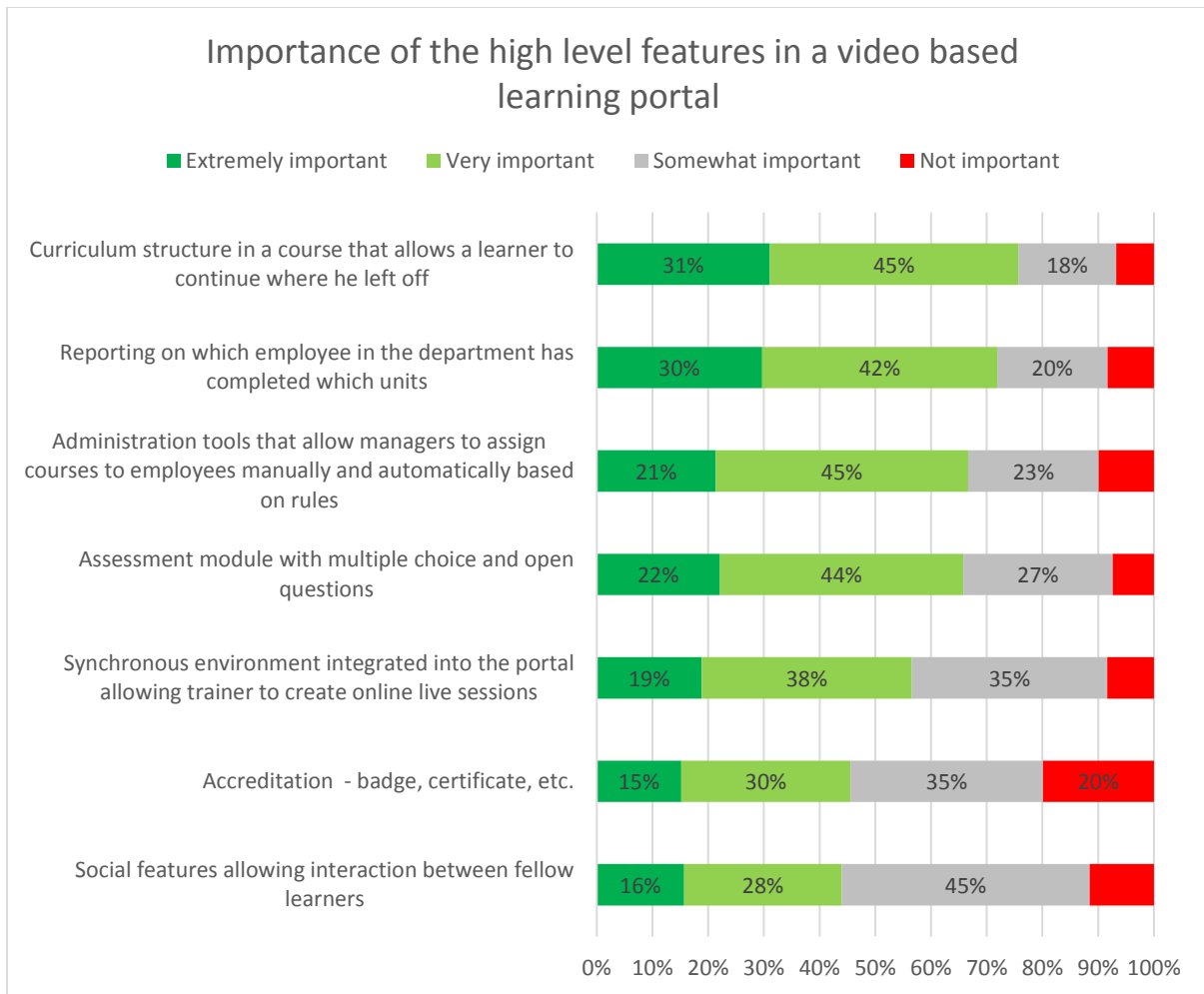


Figure 35: Importance of video based learning portal features

## Looking Forward

### VIEWS ARE SPLIT ON THE LIKELIHOOD OF VIDEO BECOMING THE NEXT POWERPOINT

#### Is Video the Next PowerPoint?

In response to the somewhat provocative question of how likely it is for video to replace some of the functionalities of presentations, the respondents were mostly split, with 38% of respondents that expressed a definitive opinion (i.e. that answered the question and did not respond with variants of “I don’t know”) believe it is very probable, 19% are not sure and 43% don’t think it is likely.

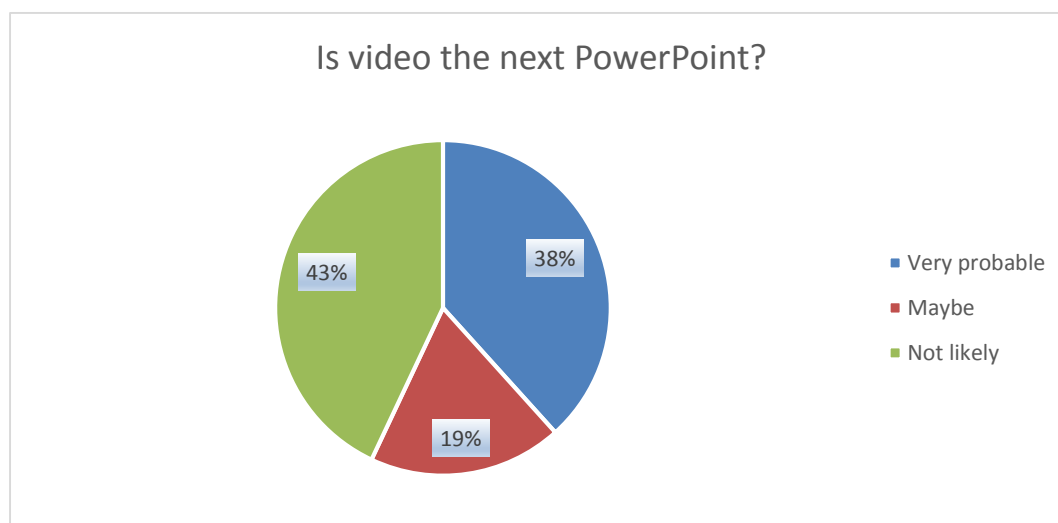


Figure 36: Is video the next PowerPoint?

Among those that don’t think it’s likely, many believe that the two tools would be complementary: ***“We see video and PowerPoint being a powerful combination, not a replacement of one by the other.”*** Wrote a CEO of a Consumer Electronics & Technology company.

Many others write that video can’t replace presentations because it lacks interactivity: ***“I don’t believe this to be true. Video is very powerful, but good presentations are interactive with the presenter, and the content on the slides is only a portion of the content delivered. Video could be used, but starting, stopping, skipping forward or moving backward is very easy in PowerPoint and not as simple in video.”*** Wrote Executive Vice President of Operations of a Digital Marketing company.

Within those that have not stated a clear direction, many hinge the answer on overcoming the challenges of cost and ease of creation: ***“If video is the next PowerPoint, talking heads are the next bullet chart. Huge potential but tools to guide users to***

***inexpensively create truly useful content will make the difference. We don't want to simply replace 'Death by PowerPoint' with 'Death by video'.*** Wrote a Video Sharing and Broadcast Manager in a defence organization.

Many of those that believe it is likely that video would replace presentations mention that video is richer and more interesting medium: ***"As our culture adopts a 'richer' view of presentation delivery, video will become the next big thing!"*** Wrote a VP Enterprise Social Collaboration in a huge Banking & Investment Services firm.

## The Role of Video in the Future

When asked how they see the role of video in organizations 10 years from now, respondents were very positive. This was an open-ended question, and an analysis and a consolidation of the responses shows that answers fall into the following buckets:

- **The role of video will significantly increase (33%)**  
***"I see video creation and consumption growing in all areas of business. The tools for creation of videos are becoming more cost effective so organizations need to provide a vehicle for others to share videos."*** Wrote a Media Services Manager in a very large education organization.  
An additional 10% mentioned the increased role of video in specific areas, predominantly training, communications and marketing
- **Video will be everywhere playing a central role (22%)**  
***"It will be an integrated element of all business processes, both user generated and corporate generated content will be the standard."*** Wrote a Business Consultant in a small education company  
***"We will move away from static text and embrace video."*** wrote a Social Business Enterprise in a very large insurance firm  
***"Video will be considered a core competency, just like PowerPoint, or Excel."*** Wrote a Director of Digital Media Technology in a huge B2B Tech Enterprise.  
***"People will relocate less for positions and use video more"*** wrote an instructor in a public university  
***"Rapid expansion, especially when the workforce is filled with the up-and-coming younger group that is comfortable being in front of a camera on a daily basis as they are used to it."*** Wrote a Client Success Manager in a medium size Transportation & Logistics organization  
***"Video is essential for every organization. Communication, collaboration will be very easy using video."*** Wrote a Director Cloud Services in a small media & entertainment company.
- **Video will become the dominant way of communication (12%)**  
***"I see video like Facetime becoming part of our lives in the place of phones. Virtual people will be everywhere. In-person won't be replaced; but video will bring forward an awareness of body language, facial expressions and tone in a way IM and email cannot."*** Wrote an Internal Communications Web Project Specialist in large Healthcare & Life Sciences organizations.
- **Video will be integrated into all tools (7%)**  
***"Seamless! Built into social activities/tools as a norm. Streaming content will***

***be the norm with minimal bandwidth constraints to the corporate networks.”***

Wrote a Virtual Engineer in huge manufacturing organization.

- **Video will continue to evolve technologically (5%)**  
***“Hopefully better tools to capture and edit video and share video will make video more like using a cell phone than using software.”*** Wrote a Sr. Program Manager of Learning Technologies in a huge manufacturing firm.

## 4. Summary – How it All Connects?

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Video is used in [a variety of areas](#) across an organization, with external use cases (marketing, brand promotion, customer training, webinars and more) being the most prominent, followed by internal use cases (company events, internal communication, workforce training, employee generated content, and more). A typical employee [watches 7](#) hours of work-related video each month, and [creates](#) on average 2.9 hours of video per month.

All use cases predominantly leverage [on-demand video consumption](#), either exclusively or in combination with live broadcasting. Recording of live broadcasts and making it available for on-demand viewing later is [deemed useful](#) in general and especially for training sessions and webinars.

Organizations are using [a multitude of vendors](#) to provide for their video needs. With video usage growing and expanding, more than 40% of respondents state that their organizations are either planning to, are in the process of, or have already completed consolidation of all of their video needs into a single vendor. It seems this is more important for large organizations and geographically distributed ones. When [choosing the right video solution](#), organizations view ease of use, price, reliability & scalability and security as most important.

Video is considered to be valuable not only as a standalone solution (for example via a [standalone](#) video portal) but is believed to add value to all the social business platforms, enterprise LMSs, sales and marketing management solutions and enterprise CMSs once it is integrated with them. There seems to be a consensus that there is a need to both “videofy” existing enterprise platforms to support the creation and consumption of video content, as well as offer video-centric products that are geared to search, browsing and consumption of video.

Throughout the survey, it is apparent that larger organizations and geographically distributed organizations see more value in video and use it to a wider extent. For example, employees from geographically distributed organizations [watch](#) and [generate](#) more videos; larger organizations and geographically distributed organizations place more value on [integrating video](#) into each and every organizational tool; and they see more value in connecting employees via video to improve communication and celebrate corporate culture.

### Why is the use of video becoming so widespread in organizations?

Internally, video contributes to [many organizational goals](#), such as knowledge sharing and improved communication. It empowers employees, boosts their creativity, helps celebrate the corporate culture and connects employees. It positively impacts [collaboration](#) and makes the [onboarding](#) of new employees smoother. Video [brings employees and executives closer](#) together. Video leads to [increased adoption](#) of social business platforms and [improved learning results](#) as well as [faster and more efficient training](#).

[Externally](#), it facilitates [improved conversions](#) in marketing campaigns, increases brand awareness, improves external corporate communications, helps sell more products online and enhances customer support. It also helps in [lead scoring and qualification](#).

Looking into the [future](#), the role of video will significantly increase as it fully integrates into all business processes and tools, becoming a principal way of communication.

In the words of some of the respondents: **“Video is essential for every organization”**; **“Video will be considered a core competency, just like PowerPoint, or Excel”**; **“It will be an integrated element of all business processes, both user generated and corporate generated content will be the standard”**.

## 5. Conclusion and a Few Recommendations

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In a world of increased mobility, consumerization and employee empowerment, it is no wonder that employees and customers expect organizations to keep up with new methods of communication, sharing and collaboration. The survey results clearly indicate that video is becoming a critical communication tool both inside and outside our organizations and that video is becoming an essential element in all user-facing platforms.

Furthermore, users increasingly expect to transition seamlessly from live to on-demand video experiences, and to have access to intuitive, flexible tools for creating, sharing, manipulating, and interacting with video content.

The survey results strongly support Kaltura's vision of powering any video experience and it is exciting to see how video in the enterprise is rapidly moving along the product lifecycle curve into mainstream adoption. No longer is video used solely for professionally produced marketing and brand promotion clips. Today, employee-generated video content is increasingly becoming the norm, and video is permeating every aspect of an organization, from executive communications, marketing, training, meetings, and customer support/helpdesk applications, through to staff recruitment.

Implementing a successful video solution in your organization is not a trivial task. Based on our experience in the field and the quantitative and qualitative data collected in this survey, here are some recommendations to help ease your path to success:

- **Review Your Organization's Current Use of Video** – If parts of your organization are already using video, then start by researching how exactly it is being used today. It makes sense to try to aggregate the current Total Cost of Ownership (TCO) - including licensing fees, network costs, administration fees, content creation costs, and infrastructure costs -before starting to plan your new video strategy.
- **Plan Your Comprehensive Video Strategy** – Start by taking a broad look at how your organization plans to use video. Engage video evangelists/early adopters from different departments to help refine the strategy and hone in on specific use cases. If your department is only in charge of a subset of the use cases, try to coordinate with other departments and raise awareness with higher-level decision makers. Deploying a broad, scalable platform that can handle your organisation's video needs for the foreseeable future is much more cost-effective than adopting a siloed approach.
- **Focus on User Experience and Authoring Tools** – Ease of use is critical for video adoption, so look for a video platform that makes video discovery and consumption intuitive, fun and simple on a wide range of devices. Authoring tools also need to be simple, intuitive, and be accessible on a wide range of devices in order to encourage employees to generate, edit and share content.
- **Embrace Video Literacy and Video Training:** Once the video platform is deployed it's important to train and guide employees on the available video capabilities and tools to ensure the widest possible adoption. Even the greatest technology is not enough if users don't know what's available or can't work out how to access videos. Provide users with the training they need to leverage the tools at hand. Consider creating user groups to let users share dilemmas, challenges, success stories, and best practices.
- **Aim for digestible short video content** – Be it content produced professionally or content created by your own employees, video is best served in small chunks. Whenever possible, limit the length of videos to a few minutes each. Individual videos

should cover a concept, while a playlist of videos covers an entire topic. Shorter videos keep the audience focused and engaged with the content and facilitate discovery and re-watching.

- Promote and signpost videos – Encourage video adoption by making sure that employees receive a steady flow of relevant, quality content. Recruiting video evangelists to share, ‘like’ and comment on content is also a good way to spread the word.
- Make video content easily discoverable - Disorganised content is a turn off for viewers and administrators. A centralised video index that is fully navigable, searchable and viewable by all employees, regardless of their location, removes the need for employees to reinvent the video wheel. By adding local language captions, videos can be repurposed for use in new territories for a fraction of the cost of developing new ones – saving organisations time and money. In-video search is also important from a governance/compliance perspective.
- Integrate video into your social tools - Video is a key building block in the drive for a more social enterprise. Choose a centralized video platform that integrates with native social platforms and applications and allows content managers to set permissions and manage what is offered by whom and on which social channels. This approach allows users, for example to have their own “My Media” gallery of content that they can access from within SharePoint, as well as Jive, IBM Connections, and more. A social video policy that lets employees be creative encourages creativity and consumption, as well as helping to promote your subject matter experts and thought leaders to a wider audience.
- Incorporate video into new trends –Tools that use gamification and crowd sourcing to solve challenges, share ideas, and identify competencies can be enhanced by the inclusion of video.
- Don’t forget about security and governance - Protecting third-party licensed content or content that employees create and share, while still making it easy enough for authorised users to use the platform, is a balancing act. Check that your security, access control and entitlement system covers varying levels of access, digital rights management, different methods of user authentication, and appropriate moderation of uploaded content and publishing.
- Develop KPIs for measuring video success – For each video use case, define the goals you want to achieve, including measurable indicators for each video and for the videos combined. The goals, for example, might be:
  - Attracting the right employees - for videos used for recruiting;
  - Increasing productivity – for videos used for training and knowledge sharing;
  - Reducing costs - for video used in training.

Video usage data and quantified user feedback can also be useful KPIs. Compare results to a similar case without video (e.g. same training but without video) to see the general impact of video, and compare results of individual videos to learn what works better and what can be improved.

- Recalibrate content based on employee feedback – This can be done by reviewing your intranet site traffic, analysing video viewership and interaction metrics, and gauging employee sentiment via polls.

## 6. Notes About Methodology

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This survey is a first attempt to perform an anonymous, statistically significant exploration of the usage, perception, and trends of video in the enterprise. Our intent is not to present a large scale, longitudinal survey.

Clearly, respondents are self-selected and prone to a positive attitude towards video, choosing as they have, to participate in a survey named “The State of Video in the Enterprise”. That said, the survey is designed to provide insights into the different uses of video in a comparative manner and explore the trends as seen by the enterprise community.



## 7. Appendix - ROI and Impact Findings Across Comparison Groups

**GEOGRAPHICALLY DISTRIBUTED ORGANIZATIONS AND LARGER ORGANIZATIONS SEE MORE VALUE IN VIDEO ACROSS ALL ORGANIZATIONAL GOALS, AND SEE A HIGHER POSITIVE IMPACT ON ALL INTERNAL AND EXTERNAL USE CASES**

In the section ROI and Impact of Video we showed the overwhelming positive evaluation of the value video brings to the organization across the board. Further analysis showed that geographically distributed and larger organizations see more value in video. The detailed tables showing the differences between the groups are presented in this section.

### Value of Video in Organization Goals:

For all goals, respondents from geographically distributed organizations see more value in video than respondents from single location organizations.

Category breakdown	Knowledge sharing	Improving communication	Enhancing product marketing	Connecting employees	Executive personification	Celebrating corporate culture	Boosting employee creativity	Empowering employees
Geographically distributed organizations	98% (70%)	97% (68%)	95% (60%)	92% (59%)	94% (54%)	90% (53%)	89% (47%)	89% (38%)
Single location organizations	91% (54%)	86% (41%)	86% (52%)	83% (38%)	84% (36%)	79% (35%)	84% (32%)	74% (21%)
Small organizations	92% (57%)	89% (49%)	89% (55%)	83% (46%)	84% (41%)	81% (43%)	86% (39%)	81% (31%)
Medium and large organizations	98% (70%)	98% (70%)	96% (57%)	93% (43%)	100% (57%)	87% (51%)	87% (43%)	85% (36%)
Huge organizations	100% (79%)	97% (74%)	94% (65%)	100% (82%)	97% (57%)	97% (51%)	88% (50%)	89% (31%)
General population	95% (65%)	93% (59%)	92% (57%)	88% (52%)	91% (48%)	86% (47%)	87% (42%)	84% (32%)

Table 12: Percentage of respondents saying video is very or somewhat valuable for each goal (in parenthesis – percentage saying video is very important for that goal)

### Internal Use Cases

For the internal use cases, significantly more respondents from geographically distributed

organizations believe that video would have a positive impact compared to respondents from single location organizations for all goals/use-cases. The same is true for larger organizations.

Category breakdown	Training more employees, faster, and more cost effectively	Improving employee collaboration and productivity of geographically dispersed team	Improving corporate communications internally (for employees) e.g. executive announcements , promoting company initiatives	Improving knowledge sharing and raising the overall level of organizational knowledge	Making the onboarding process of new employees smoother
Geographically distributed organizations	92%	89%	89%	88%	83%
Single location organizations	77%	69%	66%	70%	75%
Small organizations	81%	76%	72%	74%	76%
Medium and large organizations	93%	85%	89%	89%	83%
Huge organizations	91%	94%	94%	91%	86%
General population	87%	82%	81%	81%	80%

Table 13: Percentage of respondents believing that video would definitely or probably have a positive impact on internal goals/use-cases

The same is true also for the level of agreement with the statements “Video puts a face, a voice and character to both executives and employees. It helps employees better relate to their leaders as well as identify natural leaders and stars across the company” and “video is essential for internal communication, knowledge sharing and collaboration in large organizations” and “video provides a nearly in-person experience and makes messages powerful in a way that written communication cannot. It is instrumental in connecting geographically divided people in the company.”

Category breakdown	% of respondents that agree or strongly agree with the statement "Video puts a face, a voice and character to both executives and employees. It helps employees better relate to their leaders as well as identify natural leaders and stars across the company"	% of respondents that agree or strongly agree with the statement "video is essential for internal communication, knowledge sharing and collaboration in large organizations"	% of respondents that agree or strongly agree with the statement "video provides a nearly in-person experience and makes messages powerful in a way that written communication cannot. It is instrumental in connecting geographically divided people in the company"
Geographically distributed organizations	86%	79%	85%
Single location organizations	71%	53%	59%
Small Organizations	73%	60%	68%
Medium and large organizations	85%	77%	83%
Huge organizations	94%	91%	89%
General population	80%	70%	76%

Table 14: Breakdown of comparison groups: agreeing to the statements related to internal use cases

## External Use Cases

Significantly more respondents from geographically distributed organizations and larger organizations believe that video would have a positive impact on the external use cases as well:

Category breakdown	Marketing products and increasing brand awareness online	Improving corporate communications externally (for customers, partners, investor relations)	Selling products online (eCommerce)	Facilitating Help-Desk and customer support team in resolution of support tickets, using screen capture videos
Geographically distributed organizations	88%	87%	81%	73%
Single location organizations	75%	73%	78%	66%
Small organizations	78%	79%	78%	71%
Medium and large organizations	91%	87%	80%	64%
Huge organizations	89%	86%	83%	74%
General population	83%	82%	80%	70%

Table 15: Percentage of respondents believing that video would definitely or probably have a positive impact on external goals/use-cases

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