



THE STATE OF VIDEO IN THE ENTERPRISE 2017

A KALTURA REPORT

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1 Executive Summary and Key Findings

When 84% of employees declare that video usage in their company is on the rise, it's clear that video has been embraced by business. But how is this video transformation of the digital space really affecting companies? In our fourth annual report on the State of Video in the Enterprise, we dove into how real companies around the world are using video across their organizations.

We discovered that video use has continued to spread throughout the organization. People are working with video more than ever before: 71% report watching more video for work this year than last year, up from 63% in 2016. Nearly everyone (93%) reported that their company uses video for multiple use cases, and 10% use it for more than nine! Why is video gaining so much ground? Respondents cited a number of critical values that video provides. The most popular was "improving communication", which 98% of respondents found valuable. 98% also saw the value of using video for training employees better/faster.

Looking forward, many project even greater usage:

- 96% agree that "Being able to analyze user engagement within a video will become an important tool."
- 93% agree that "Live streaming will become increasingly important for business."
- 94% agree that "Video will become increasingly important across every department in an organization."

The survey results also revealed the growing demand for all leading technology platforms to add native support for video, with over 80% of respondents from large organizations stating that they now consider the integration of video content and workflows into all of their key technology platforms an important requirement.

And finally, a few interesting quotes from respondents:

- *"Video will play an increasing part in organizations' communications practice." (Marketing, medium Central American company)*
- *"Video will become the primary method of communication, outpacing email." (IT, large North American company)*
- *"Will eliminate the barriers between internal coworkers and external partners or clients in every way." (General management, small East Asian company)*
- *"With the increase in remote/mobile workers, video will become more of a business staple for daily operations." (Services, medium North American company)*
- *"Video is the new ink!" (Corporate Communications, large European company)*

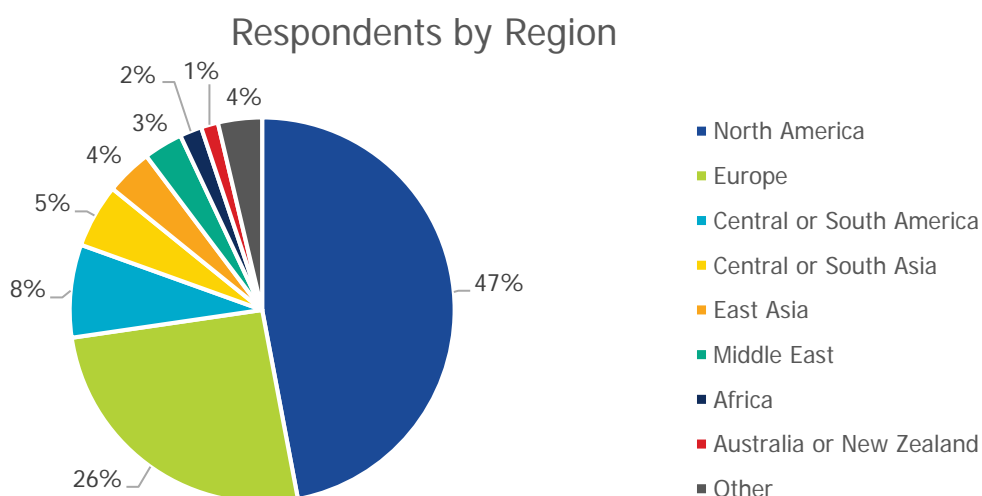
I would like to extend my thanks to all of the survey participants for their contribution to this report. If you are interested in finding out more about the value of video in organizations, you can watch our [library of on-demand video content](#) or contact us directly at survey@kaltura.com.

Sincerely,
Dr. Michal Tsur, President, Kaltura Inc.

2 Methodology and Demographics

This survey was conducted online during September 2017. It was distributed not only to Kaltura customers, partners, and prospects, but also shared across multiple social media channels and professional groups. Nearly 650 enterprise professionals from around the world, representing a wide array of industries, responded to the survey.

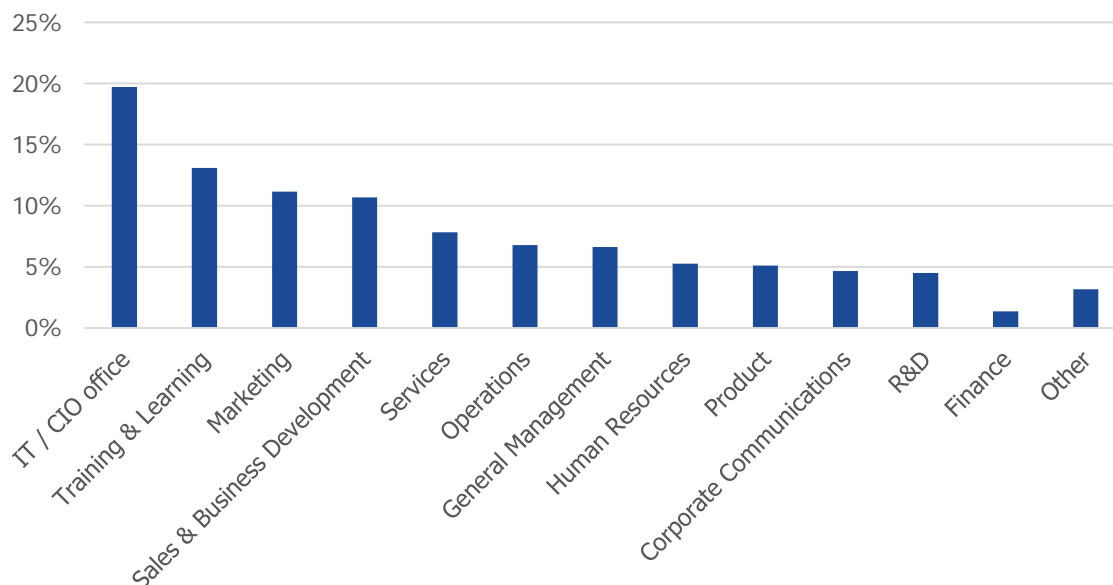
A little under half (47%) were from North America, and a quarter (26%) came from Europe. Every continent save Antarctica is represented. The survey was conducted in English.



The respondents fulfill various roles¹ within the organization, most notably: IT, training & learning, marketing, and sales. Among the "other" departments, respondents cited mostly engineering.

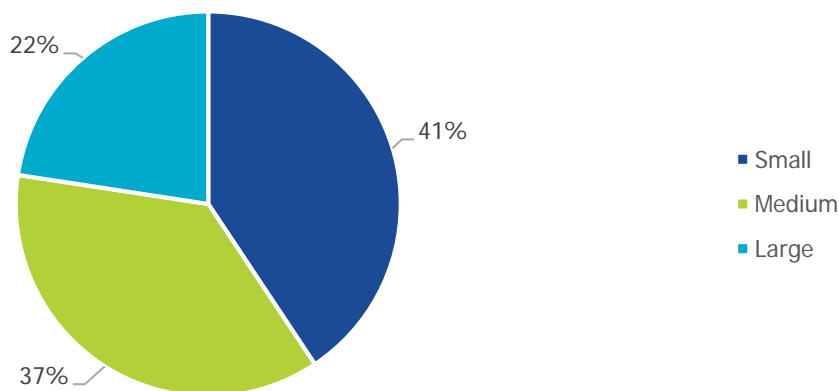
¹ Many respondents fulfill multiple roles and therefore may be counted in several categories.

Respondents by Department



For the purposes of this survey, we define small organizations as organizations with up to 250 employees, medium organizations as organizations with up to 10,000 employees, and large organizations as organizations with more than 10,000 employees. This year, the most respondents (41%) came from small companies and the fewest (22%) from large.

Respondents by Organization Size



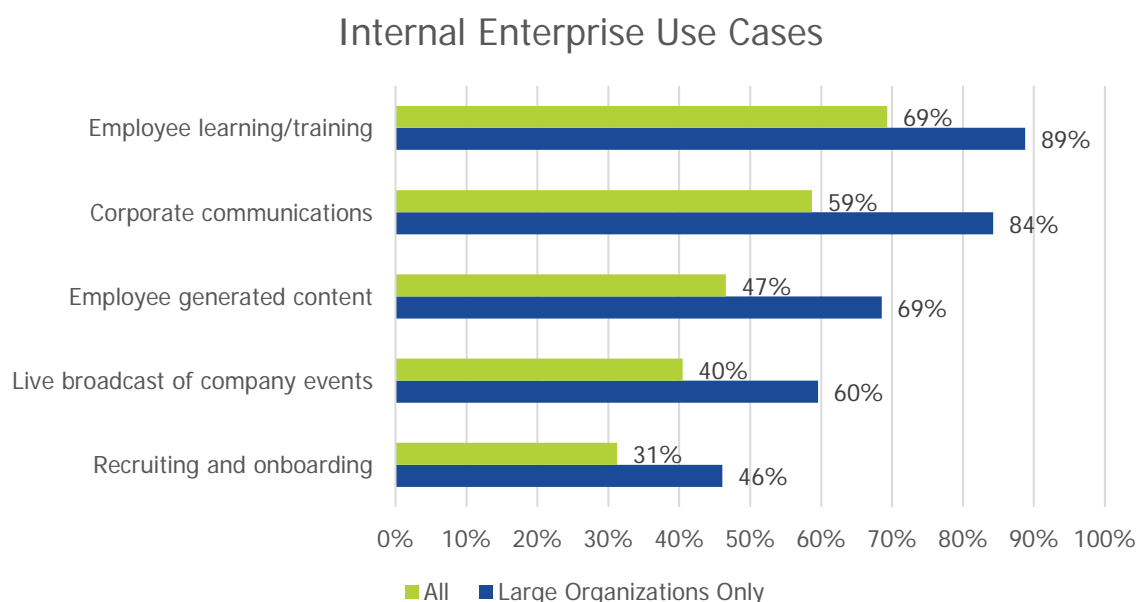
3 Results

3.1 Video Usage

Video of all kinds, whether on-demand or live streaming, has a wide variety of possible use cases, both inside the company and facing outwards.

3.1.1 Popular Use Cases – Internal

Within the company, video has a number of use cases. We asked respondents about some of the more common use cases, which only scratches the surface of what video can be used for. By far the most popular of the uses we asked about is employee learning, development, and compliance training, with 69% of respondents reporting that their company uses video for this purpose. Corporate communications (town hall meetings, recorded messages, initiative launches, and the like) is used by 59% of respondents and employee-generated content (sharing best practices, how-to tutorials, and more) is used by 47%.

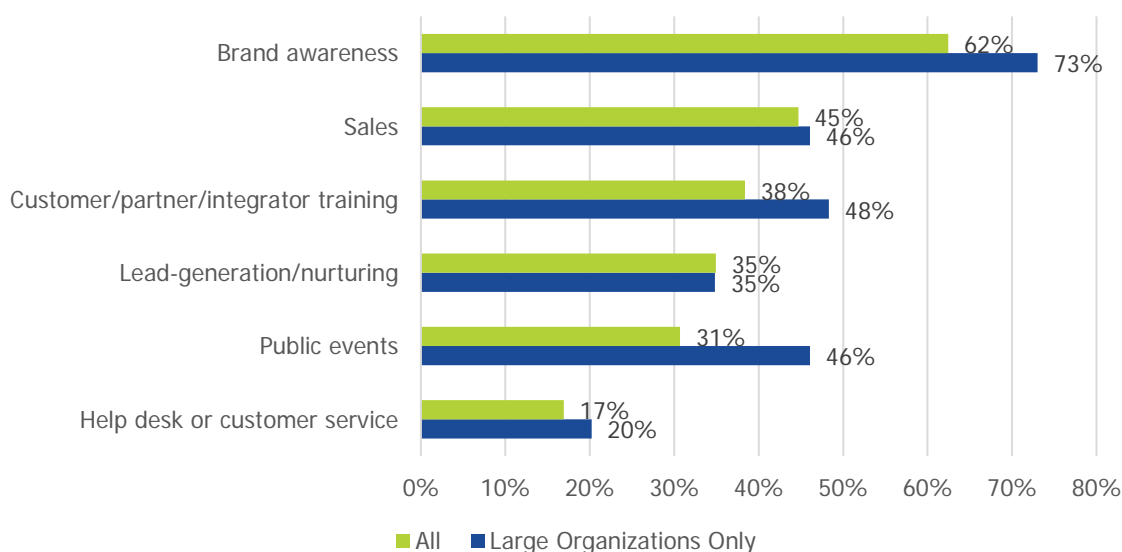


Large companies are more likely to use video for more use cases. When just large companies are considered, usage jumps significantly with 89% using video for learning/training, 84% using it for corporate communications, 69% making use of employee-generated content, and 60% using it to broadcast company events live.

3.1.2 Popular Use Cases – External

Video is also being used to communicate outside the company, for marketing, sales, training customers or partners, customer support, and broadcasting public events. Brand awareness (such as website videos, social media, advertising, and other marketing activities) is the most popular, with 62% of respondents reporting that their company uses video for this purpose.

External Enterprise Use Cases



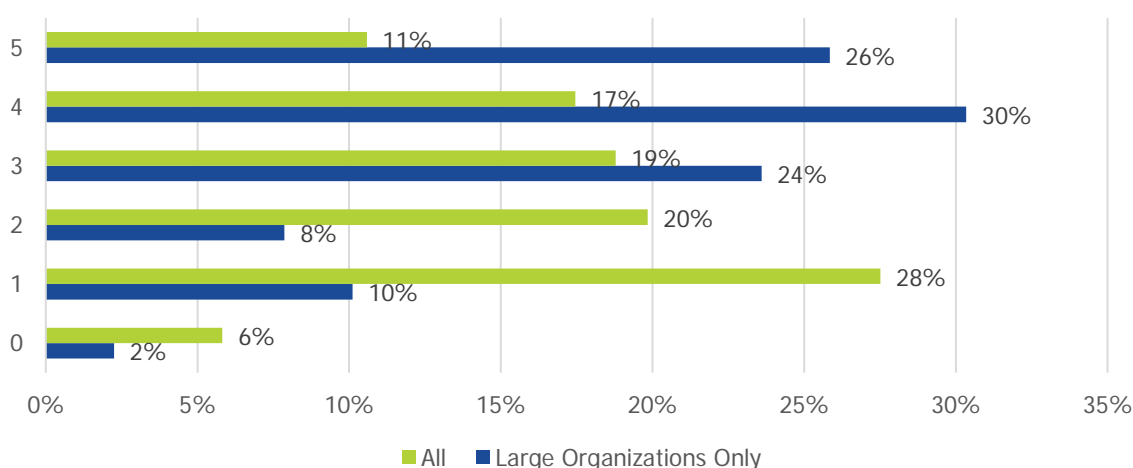
Again, when only large companies are considered, these numbers increase significantly: 73% use video for brand awareness, and nearly half use video for sales and customer/partner/integrator training. Particularly interesting is the relative jump in broadcasting public events, to 46%, which is unsurprisingly much more likely to be done at the level of larger corporations. That nearly half of the large companies are broadcasting such events, though, is noteworthy.

3.1.3 Using More than One Use Case

One interesting finding here is that very few respondents only use video for a single use case. In fact, most use video for a large number of purposes within their organization. This is only counting those specific use cases we suggested; many organizations are doubtlessly using video for other purposes as well.

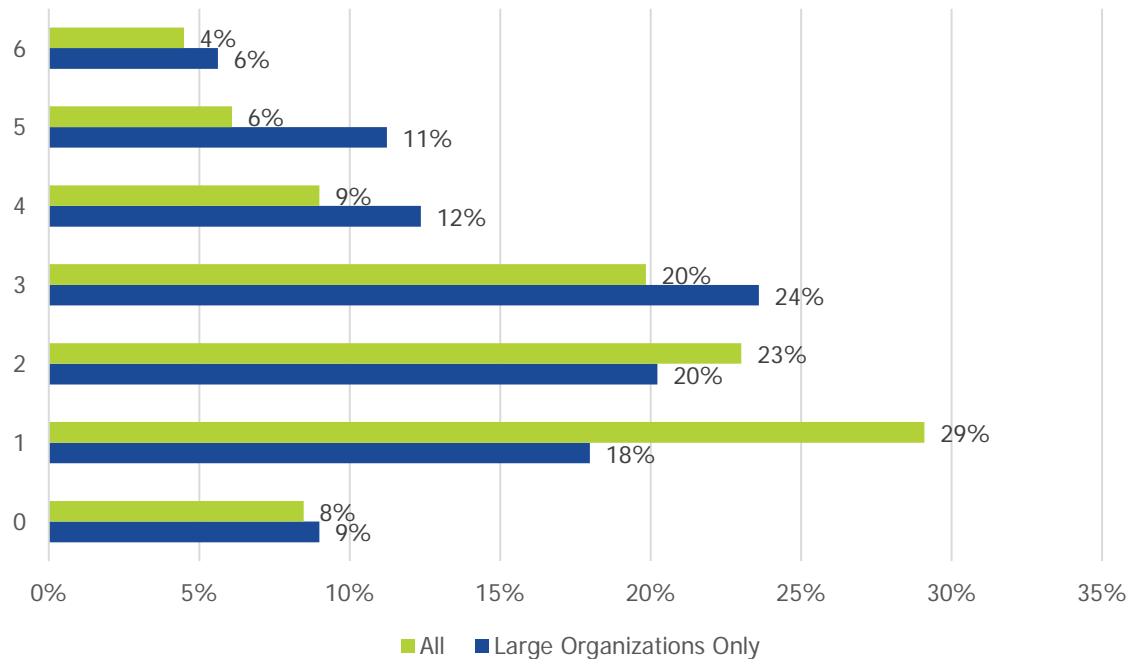
For internal use cases, 67% of respondents are using video for more than one purpose; 11% are using it for five different reasons.

Number of Internal Use Cases



This is even more dramatic when considering only large companies. 88% use video for more than one use; more than a quarter use it for five different uses. Similar trends are found around external use cases: 62% of all companies use video for more than one external use case; 10% use it for more than five different purposes.

Number of External Use Cases

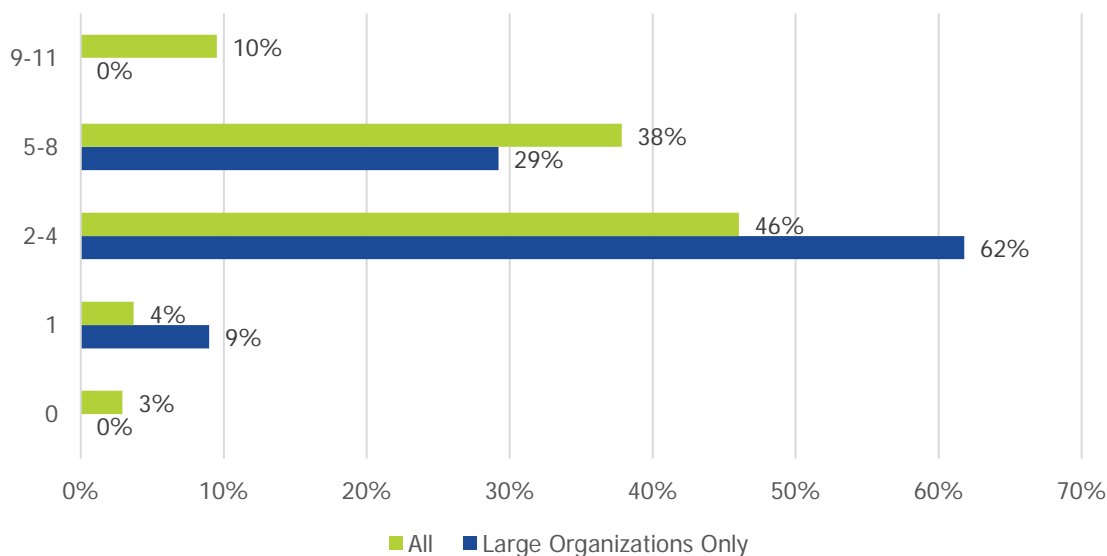


And 73% of large companies use video in more than one way, while 17% use it for more than 5 purposes.

So when the full range of use cases are considered, both internal and external, nearly everyone (93%) reports using multiple use cases, with 10% using it for more than 9 different purposes.

(6% of all companies reported using video for just internal purposes, and only 3% reported using it for just external purposes.)

Total Number of Use Cases

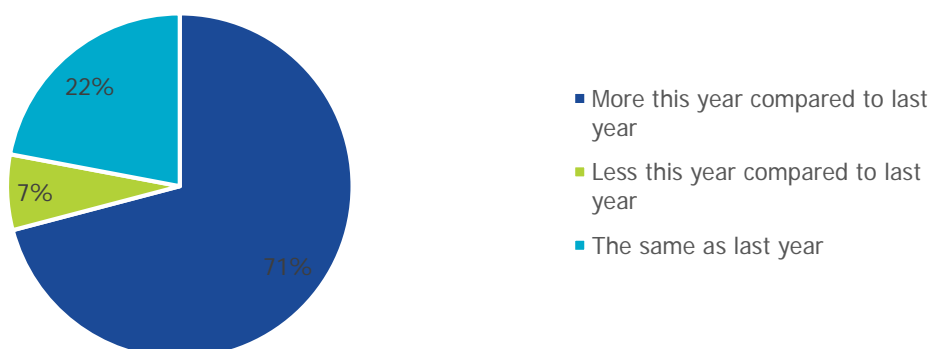


Interestingly, the large companies display a more clustered use: 91% used it for more than one use case. But the larger companies topped out at 8 total uses, with no one using every available use case listed. This may be a result of more rigid siloes in larger companies, but more research would be necessary to confirm.

3.1.4 Employees' Use of Video - Watching

How much do employees use video? We asked employees how their personal use of video for work has changed in the last year: 71% report that they are watching more video for work this year than last.

Trend of Video Watching—This Year Compared to Last Year

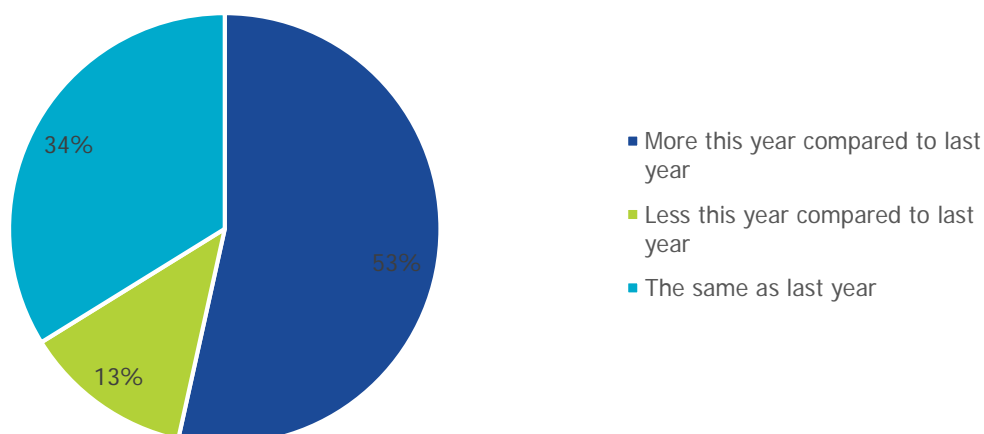


When compared to last year, even more people feel they are watching more video lately (71% in 2017 vs 63% in 2016). So this is a trend that appears to be accelerating.

3.1.5 Employees' Use of Video – Creating

Watching video is easy; creating it takes a great deal more effort. However, active video creation by employees is also on the rise. 53% report creating more video for work than last year.

Trend of Video Creation—This Year Compared to Last Year

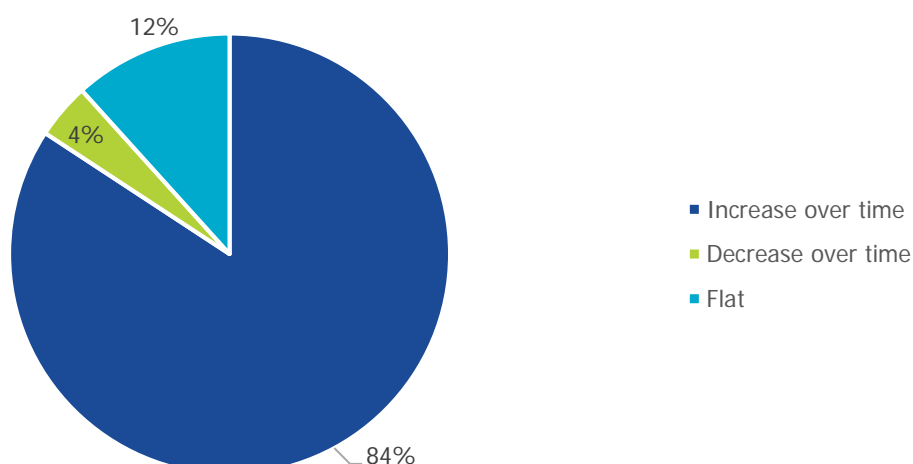


Similarly, this trend is accelerating, with 53% reporting greater video creation than last year vs 44% in 2016.

3.1.6 Video Usage in the Organization Overall

When asked about the trend in usage of video in the organization overall, the answer was a resounding “increase over time,” at 84%.

Trend in Usage of Video in Organization Overall



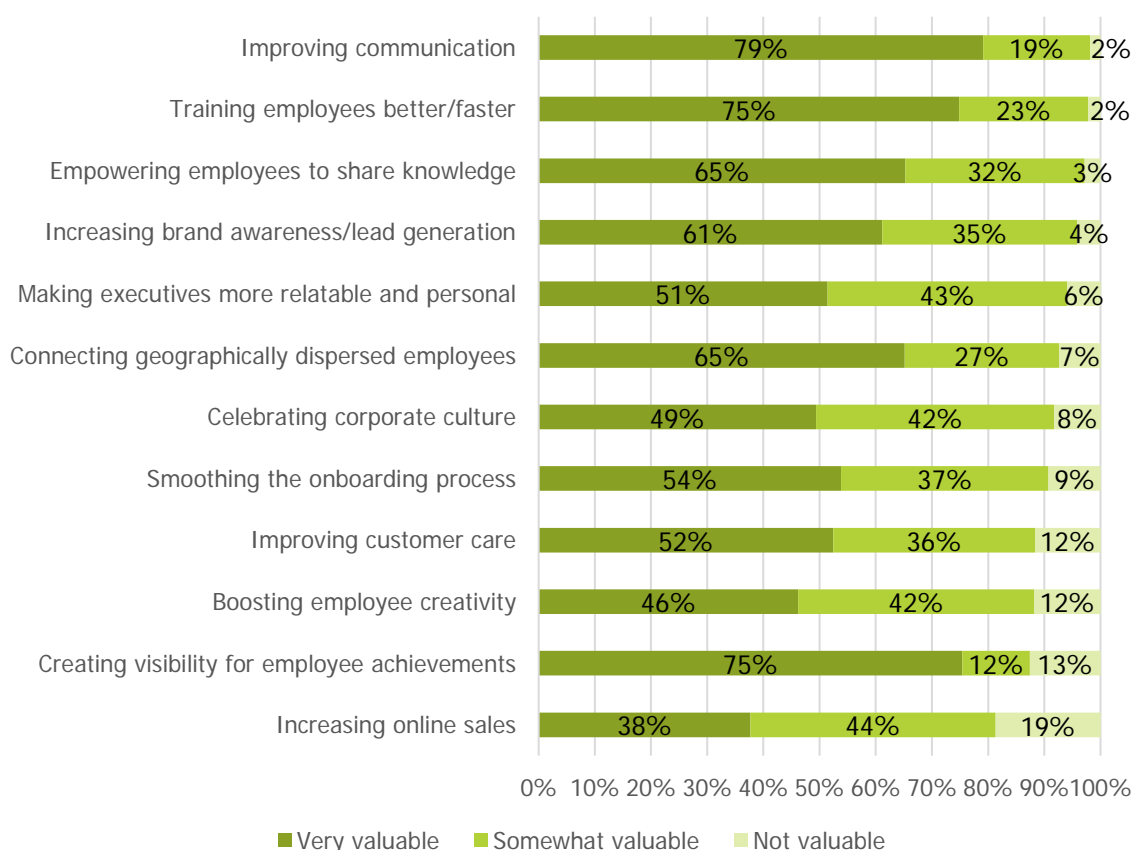
3.2 The Value of Video

3.2.1 Impact on Organization Goals

Why use so much video? Video serves a number of goals within an organization, providing multiple returns on the investment.

The most popular value video provides is “Improving communication”, which 98% of respondents found at least somewhat valuable and 79% found very valuable. 98% also saw the value of using video for training employees better/faster (75% finding it very valuable). Other very popular reasons to use video (more than 90%) include empowering employees to share knowledge, making executives more relatable and personal, connecting geographically dispersed employees, celebrating corporate culture, smoothing the onboarding process for new employees, and increasing brand awareness and lead generation.

Value of Video Across Organizational Goals



We have asked a similar question over several years now. Over time, these opinions have been essentially stable, with a slight rise between this year and last. This is evidence of video's established value in the workplace.



	2014	2015	2016	2017	2016-17 Change
Training employees better/faster		96%	96%	98%	2%
Improving Communication	93%	98%	96%	98%	2%
Connecting geographically dispersed employees	88%	94%	94%	93%	-1%
Making executives more relatable and personal	91%	91%	92%	94%	2%
Empowering employees to share knowledge	95%	91%	91%	97%	6%
Enhancing product marketing and brand awareness	92%	95%	91%	96%	5%
Smoothing the onboarding process of new employees		90%	90%	91%	1%
Celebrating corporate culture	86%	90%	90%	92%	2%
Creating more visibility for employee effort and achievements		92%	90%	87%	-2%
Boosting employee creativity	87%	89%	87%	88%	1%
Increasing online sales		80%	74%	81%	7%

*(Note: in 2014 was phrased “connecting employees”, which may not have articulated specifically the geographic distribution issue)

** (Note: in 2014 was phrased “knowledge sharing”, and therefore may also have taken into account training scenarios)

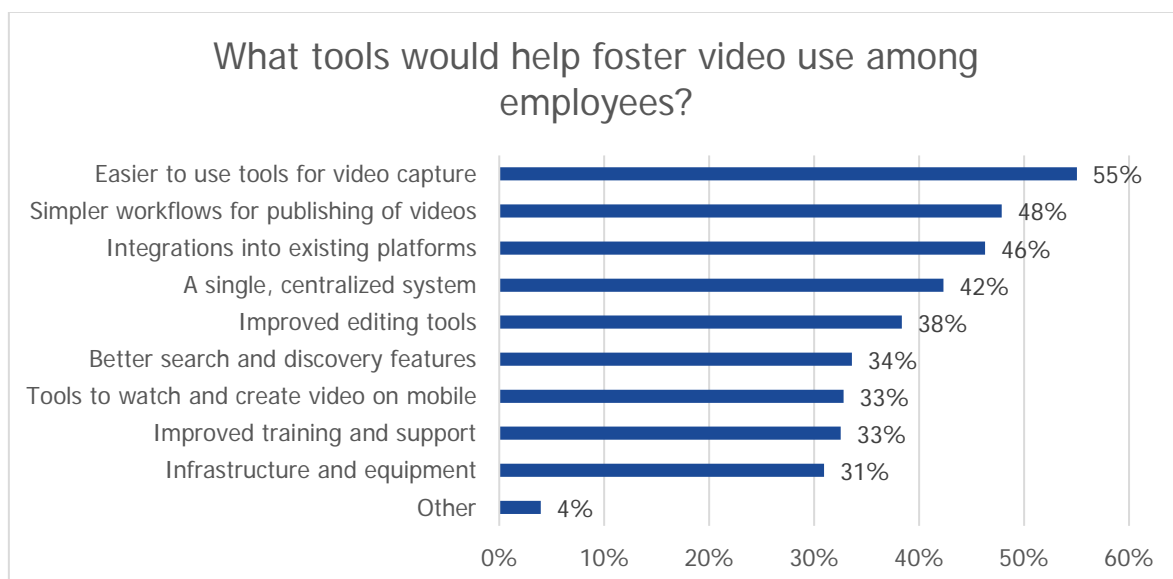
Comparing responses on the basis of company size reveals some small but interesting differences. While everyone appears to agree on the overall usefulness of video for each of these categories, the large companies are even more likely to do so. For the top two values, communication and training, 100% of respondents from large companies felt video had value. On the other hand, the one value that small businesses took the lead was for “Increasing online sales” – 90% of small businesses reported video as valuable compared to 81% for the group as a whole. Given that video often takes more resources to create than other forms of media and small businesses tend to be the most resource-strapped, this truly emphasizes the potential ROI for them in video for online sales.

3.3 Video Tools and Management

Using video across the organization requires some thought on how encourage employees to use video as well as how to manage that video.

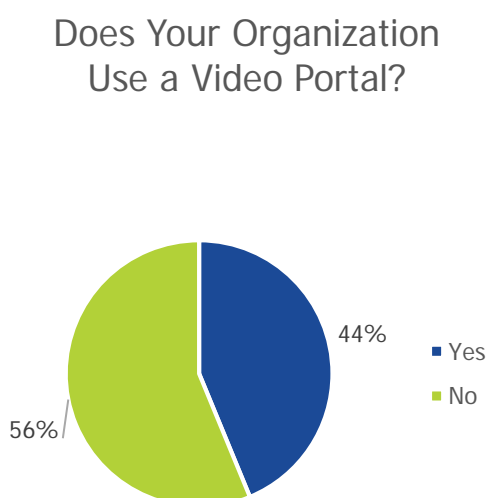
3.3.1 Video Tools Needed

Video is of little benefit to the company if employees cannot or will not use it. We asked respondents what tools would help foster the use of video in their organizations. The most popular response by far was a request for easy video capture tools—more than half of respondents thought this is critical to increasing video use. Simpler publishing workflows (48%), integrations into other platforms used by the company (46%), and a centralized system for video management (42%) were all also considered important. These answers are fairly similar to those of previous years, with a few percentage points’ gain.

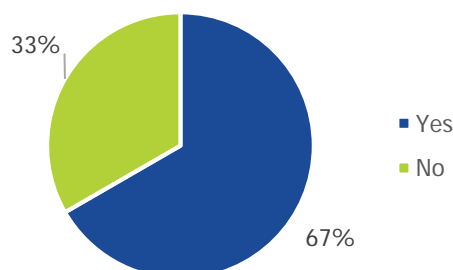


3.3.2 Video Portals for Enterprise

Since nearly half of respondents think a single, centralized system would help increase adoption, it's worth exploring how many use such a system. One way of organizing video content across the organization is with an internal enterprise video portal, and this year 44% of respondents say their organization use such a video portal. These numbers are nearly identical to last year's.



Does Your Organization Use a Video Portal? (Large Organizations Only)

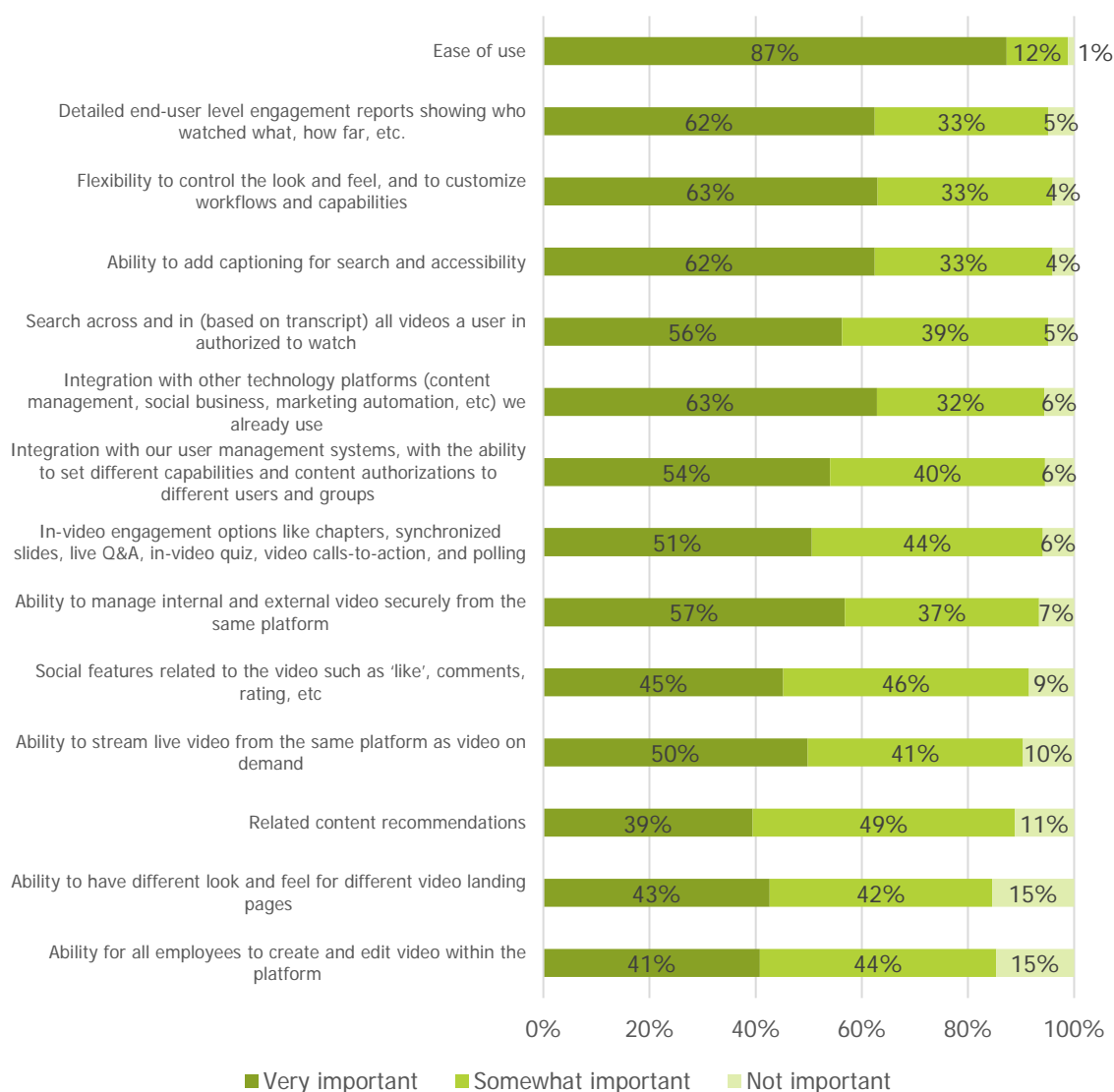


Amongst large organizations, two-thirds use a video portal.

3.3.3 Video Portal Features

When asked what attributes were most important in choosing a video portal, the most important feature was clearly ease of use. However, a number of other features were also a priority, including detailed end-user level engagement reports, the flexibility to control both appearance and workflow, captioning for accessibility and search, and the ability to search across all videos a user is entitled to watch.

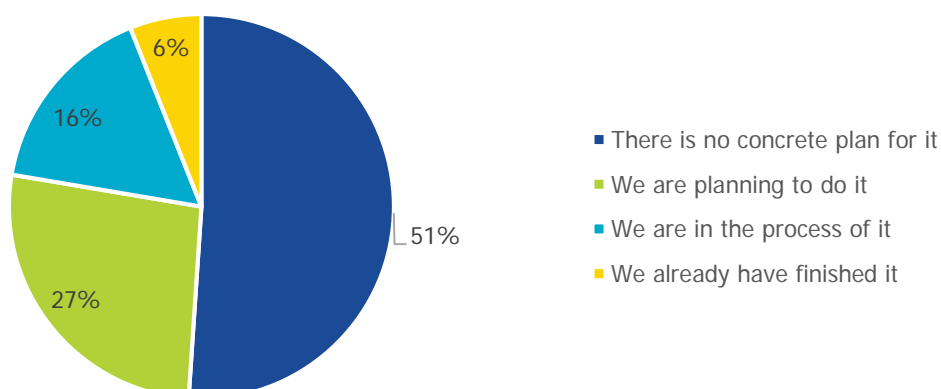
Importance of Video Portal Features and Attributes



3.3.4 Consolidation of Video Platforms

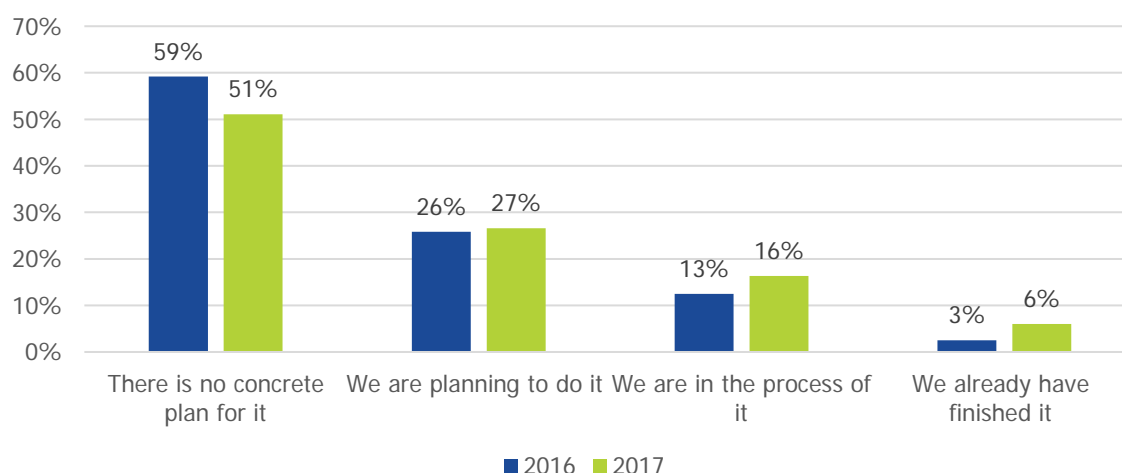
Most organizations use multiple vendors for various video-related needs, including webcasting, web conferencing, telepresence, corporate video portal, video-based training, marketing, and more. When asked about their organization's plans to consolidate the various systems under a few centrally managed solutions, nearly half were in some stage of doing so (whether planning stages, in the process, or finished).

Consolidation Plans



Compared to last year, there is a slight trend towards greater consolidation. Overall, the percentage of companies in some stage of consolidation (as you can see below) increased by 20% relative to last year.

Change in Consolidation Plans



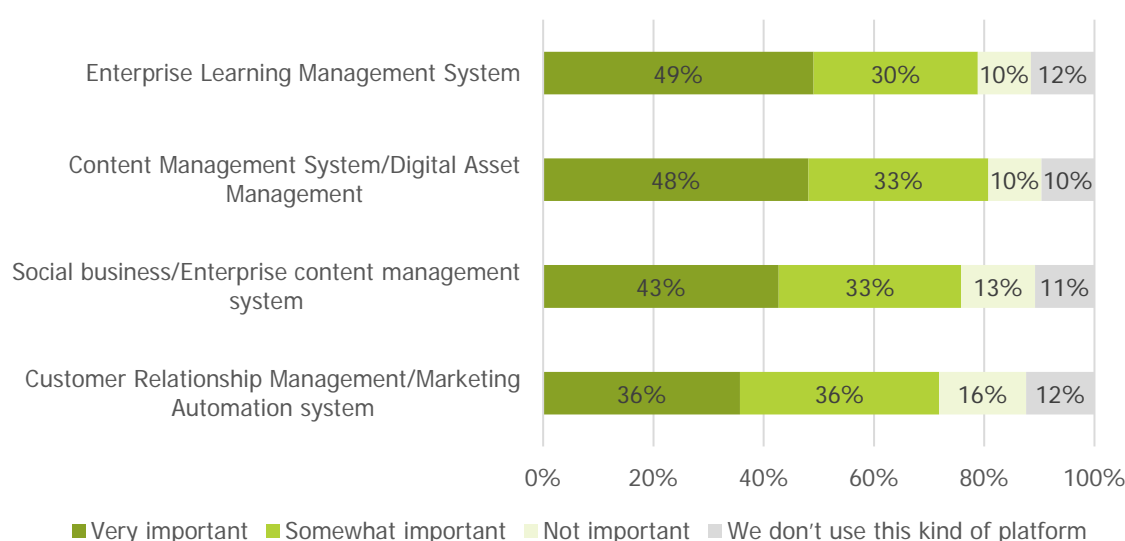
This trend is accelerated in larger companies, where 33% of large companies have already consolidated video platforms or are in the process of consolidating and an additional 32% plan to consolidate.

3.3.5 Integrations with Other Platforms

One key insight from this year's survey results is the growing need for all major software platforms to support video natively. The results reveal that large organizations now consider the integration of video content and workflows into all of their key technology platforms an important requirement, and while many of these platforms already support direct integration of video content and workflows, many key platforms are still lacking in their ability to fully support video natively.

When asked how important it was that video be integrated into the following platforms: 81% thought it was at least somewhat important to integrate video into a Content Management System/Digital Asset Management (such as Drupal, WordPress, or Adobe CQ5). 89% felt this way after those who do not use such a platform were removed. For an Enterprise Learning Management System (such as Sumtotal, Saba, or SuccessFactors), 79% thought video integration was important (again 89% when controlled for those who do not use an Enterprise LMS). For social business/Enterprise content management (such as SharePoint, Jive, or IBM Connections), 76% thought integration was important (85% controlled). And for Customer Relationship Management/Marketing Automation systems (like Salesforce, Marketo, or Eloqua), 72% thought it was at least somewhat important to integrate video (82% without nonusers).

Integrations with Other Platforms



Large companies find integration even more compelling. When controlled for companies that use each respective platform, 90% thought integrating video into Content Management was important; 89% for Social Business platforms; 77% for Customer Relationship Management; and a high of 93% believe it is important to integrate video with the Enterprise Learning Management System.

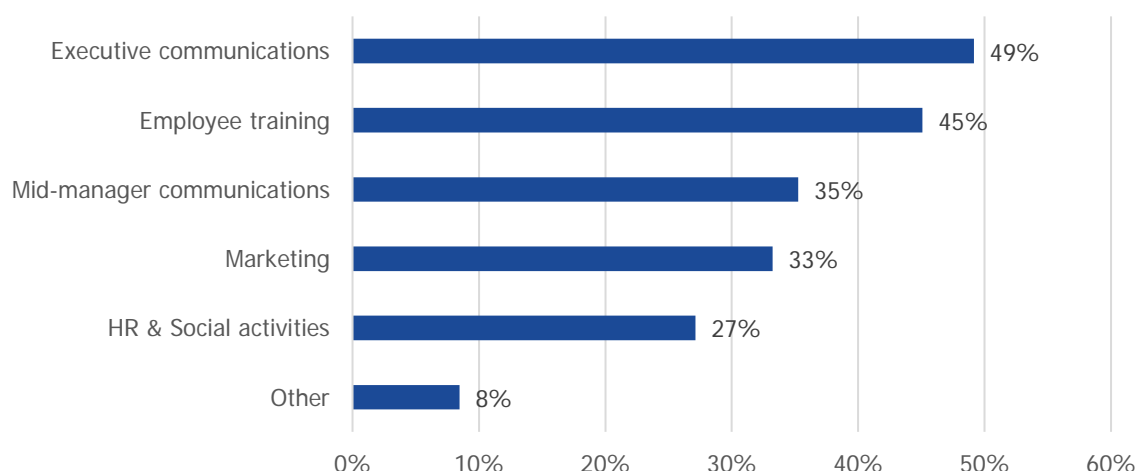
3.4 Webcasting

One of the big trends in enterprise video concerns live broadcasts. A convenient and increasingly popular way to approach live video for enterprise is through webcasting. For the purposes of this survey, we defined webcasting as a media presentation, by a single or multiple speakers, that is distributed over the Internet to many simultaneous viewers (as opposed to web conferencing, which is an online meeting and collaboration solution).

3.4.1 Reasons to Use Webcasting

Respondents displayed a fair amount of diversity in which use cases they embraced, with nearly half using webcasting for executive communications (C-suite). Employee training was another relatively popular use for the tool, at 45%.

Uses for Webcasting

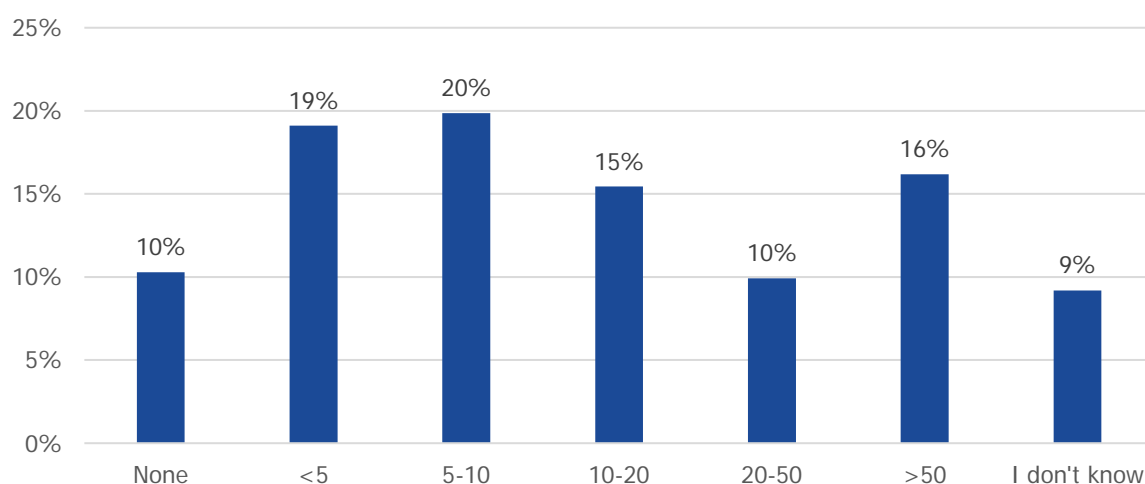


These were used even more frequently by large companies. For example, 71% of large companies use webcasting for C-suite communications and 49% use webcasting for employee training.

3.4.2 Frequency of Internal Webcasting

With so many using webcasting for internal communications, it's worth exploring how often these webcasts take place. Again, there is a fair amount of diversity in how many internal webcasts are broadcast within a single organization. Interestingly, though, 26% report more than 20 a year, and 16% report more than 50 internal webcasts each year.

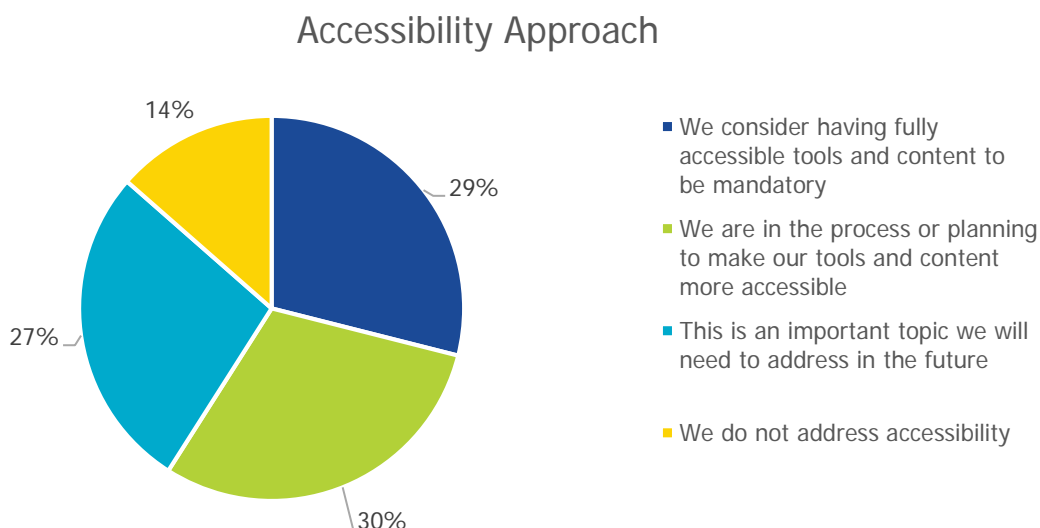
Internal Webcasts/Year



3.5 Accessibility

Accessibility has become an increasingly important topic for many companies looking to accommodate the needs of their clients and employees. For video, this includes using captions, players that are friendly to the visually impaired, etc. When asked, to the best of your knowledge, what their organization's outlook towards accessible video tools and

content is, our respondents gave a fairly even split in their answers. Slightly less than a third each consider accessibility mandatory, a work in progress, or something they still need to address. 14% have not yet addressed accessibility in any way. While some companies have a rigorous approach towards accessibility, on the whole, accessible enterprise video is still in relatively early stages.



Larger companies are farther along in this process. 67% of large companies (as opposed to 59% of all respondents) are in the process or have completed making video tools and content accessible. Only 5% do not address it at all.

3.6 Looking Forward

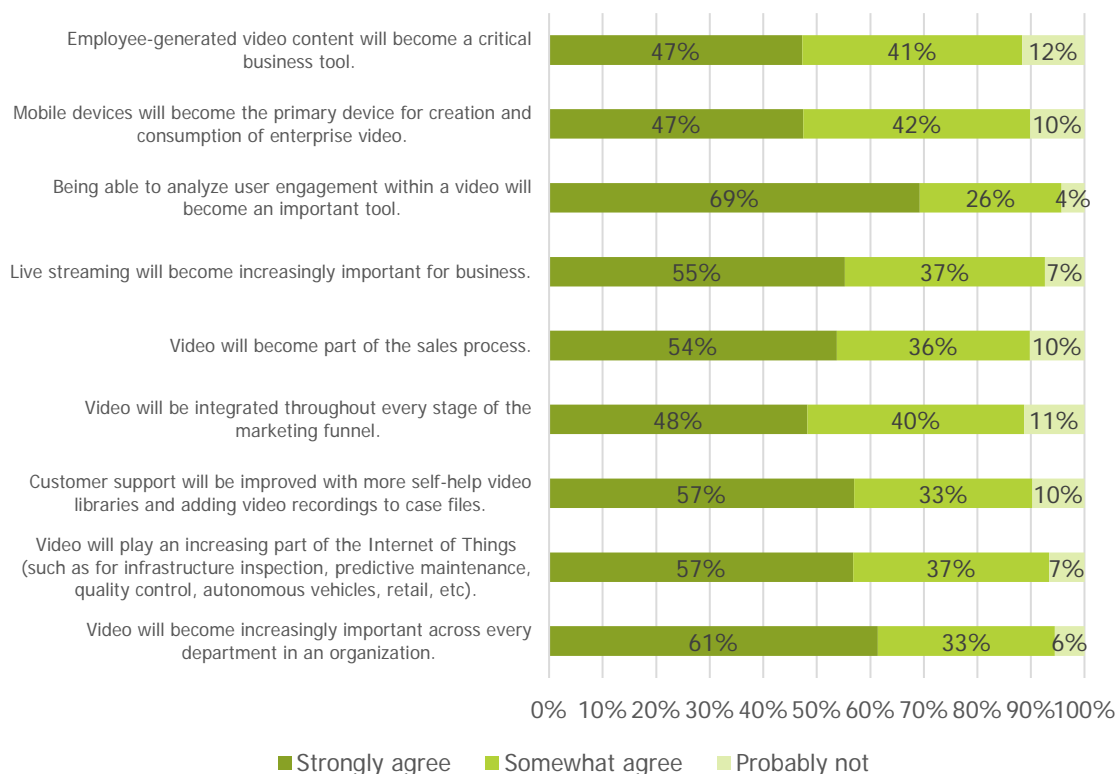
3.6.1 Trends in the Next Three Years

Looking forward, we asked participants how they saw trends for video over the next three years.

- 88% agreed with the statement "Employee-generated video content will become a critical business tool."
- 90% agreed "Mobile devices will become the primary device for creation and consumption of enterprise video."
- 96% agreed "Being able to analyze user engagement within a video will become an important tool."
- 93% agreed "Live streaming will become increasingly important for business."
- 90% agreed "Video will become part of the sales process."
- 89% agreed "Video will be integrated throughout every stage of the marketing funnel."
- 90% agreed "Customer support will be improved with more self-help video libraries and adding video recordings to case files."

- 93% agreed “Video will play an increasing part of the Internet of Things (such as for infrastructure inspection, predictive maintenance, quality control, autonomous vehicles, retail, etc).”
- 94% agreed “Video will become increasingly important across every department in an organization.”

Video in the Next 3 Years



3.6.2 Predictions for the Future

When asked how they saw the role of video in organizations five to ten years from now, respondents were overwhelmingly positive. Words we saw over and over included “critical,” “important,” “essential,” “cornerstone,” “growing,” and “exponential.”

Some sample comments from those touting the importance of video:

- *“Major. Those who are not engaged will suffer a high price.” (General management, small European company)*
- *“It would be important part of every organisation.” (IT, small Central American company)*
- *“Будет полностью автоматизировано с помощью видео” [Everything will be fully automatic with video] (Business Development, small European company)*
- *“Video will likely be used for everything, as more and more people become comfortable with getting in front of their webcams and recording.” (Design, medium North American company)*

Others predict that video will essentially become ubiquitous.

- *"Video will be central to all things in the world" (Sales, small South American company)*
- *"Just another tool in the toolbox" (IT, small European company)*

Others make predictions about the technologies video will replace. One recurring theme was from a number of respondents who foresee video eventually replacing text as the primary method of communication.

- *"Paramount! Video will replace email and other communications in the next 5-10 years." (Sales, medium North American company)*
- *"We may be close to a "post-reading" business environment in 10 years. Millennials will make up 75% of the workforce, communicating via video, video conferencing, emoji, and GIF." (Training & Learning, large North American company)*

Why is video so valued in the enterprise? A number of respondents cite specific reasons they think video is so powerful.

- **Video is effective.**
 - *"It will become a part of the everyday business fabric. Video is becoming more prevalent and is seen as a powerful means to message, inspire, teach and illuminate. It is often more memorable than the written word and it showcases people's personalities." (Corporate communications, large North American company)*
 - *"I think video will play a key role in everything we do in the future. It's easier for people to visualize from video then from reading or from looking at pictures." (Operations, large North American company)*
- **Video generates engagement.**
 - *"It will become a must have to get the required competitive advantage in engaging both internal and external customers." (IT, large South American company)*
 - *"Video will be the first medium of engagement with clients and new leads." (Services, small European company)*
- **Video helps connect people.**
 - *"Video will continue to play a critical role for daily business activities as companies grow and become more global and try to cut back on travel costs. Video allows us to stay connected no matter which geography you are trying to work with." (Marketing, large North American company)*
 - *"Connecting remote workers and helping us communicate corporate messages, helping us create engagement and drive the culture." (Training & Learning, medium European company)*
- **Video can reach people anywhere, at any time.**
 - *"Increasingly accessible to create and publish videos wherever, whenever." (Marketing, medium North American company)*

Respondents also noted a number of trends they see coming for enterprise video.

- **User-generated content**
 - *"I believe every business unit will request the use of a system where employees can easily share user generated content." (Sales, medium North American company)*
- **Integrated with company workflows and platforms**
 - *"Video will be completely integrated into all aspects of the business environment and will be a primary means of communication." (Marketing, large North American company)*
- **Mobile-readiness**
 - *"Faster, smoother, easier to access on mobile devices and used in more applications." (Strategy consultant, small North American company)*

A number of respondents cite the many use cases they see for video.

- *"Very mandatory. Important for marketing and engaging with potential customers. Great for training, social media and communicating with others that live out of town." (Services, small North American company)*
- *"Linha de frente como agente facilitador em todos os segmentos." [A line of services that facilitates in all segments] (IT, small South American company)*
- *"It is very important aspect of managing our growing organization. The spread of knowledge, training, events, workshops and other internal activity if presented via videos/webcasts the process will be much faster and cut a lot of efforts especially repetitive ones. This need of videos streaming and other form of video usage will be growing in future a lot." (R&D, medium East Asian company)*
- **Meetings**
 - *"Move to replace email and teleconference communications in favor of full video meetings and product demonstrations." (General Management, small North American company)*
- **Marketing**
 - *"Central in marketing." (Marketing, medium European company)*
- **Sales**
 - *"From a sales tool video is crucial today and will only become more important with increased access and comfort." (Sales, small North American company)*
- **Training**
 - *"More just-in-time training options." (Training & Learning, medium North American company)*

○ **Knowledge Sharing**

- *"Best way to gather employee expertise, capture it, and provide easy to find/review access. Video wikipedia." (Training & Learning, medium North American company)*

Respondents also projected farther out, musing on how more advanced technologies may change how we approach video.

- *"3D video will be the norm with few or no words, just visuals." (Training & Learning, medium North American company)*
- *"Natural integration of high quality live video (including 360 degree video) running on mobile platforms, will become extremely important for regular meetings with remote and decentralized teamwork. AR integration will also play an important role for presenting information at meetings and training." (General Management, medium North American company)*
- *"Will be a tool of daily and personal use also because the platform of holography +video in the clouds will allow the user to become telepresent in the most varied situations in his company and in the personal life." (Business Development, small South American company)*
- *"Video will change significantly in the respects of analytics. Through the use of Artificial Intelligence and machine learning, our ability to understand the deep impact of video content will open new opportunities to engage with learners, customers and viewers of all kinds." (IT, medium North American company)*

Not all of the feedback was positive. Some expressed concerns.

- *"More use of video as a means of top-down communication. I do not see any fundamental shifts of employees suddenly having time or resource to produce videos themselves - written communication is still fair simpler than video." (IT, small European company)*
- *"Depends on the company's ability to respond from an infrastructure standpoint." (Training & Learning, large North American company)*

But one respondent sums things up,

"No longer something else on the plate - video and the ability to serve it will be the plate. Kaltura's transcoding service will become the norm and expectation for mobile devices and BYOD learning ecosystems." (IT, medium North American company)

4 Summary—How Does It All Connect?

Enterprises [around the world](#) are using video for a [wide variety of use cases](#), both [internal](#) and [external](#). Some of the most popular uses are for employee learning/training, corporate communications, and brand awareness. Most companies [use video for more than one purpose](#), with some using it for nearly a dozen.

Employees report both [watching](#) and [creating](#) videos for work at higher rates this year than last year. They report this at higher rates than they did last year, indicating that the trend for individual professional video usage continues. The vast majority of respondents agree that video usage for their organization as a whole is [increasing](#). As a result, organizations are increasingly [using video portals](#) to manage video company-wide, [consolidating their video platforms](#) for easy management, and seeking to [integrate](#) video into other software platforms they use.

This growth in video usage is undoubtedly because of a strong perception that video is effective. Video has a [huge impact on a wide range of goals](#) for organizations, from improving communications to training employees better. Employees project an even [greater role for video in the next few years](#), across departments including sales, marketing and customer support; through mobile deployment and livestreaming; and as part of the Internet of Things.

This role is predicted to be even greater looking [five to ten years in the future](#). Video will become ubiquitous, a tool as easy to use and commonplace as email. It will change training, team-building, and outreach, as practices like telepresence, video wikis, and greater user-generated content of all kinds binds companies closer together, even as they achieve greater reach.

As a product manager at a North American company noted, "Video is a better tool to deliver information in the internet age."

5 Notes About Methodology

This survey is our fourth survey on the topic, serving as an anonymous, statistically significant exploration of the usage, perception, and trends of enterprise video. 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 Enterprise Video”. 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.

The variance and multitude of institutional roles, industries and organization sizes held by respondents presented a challenge when analyzing the data, considering that people of different roles and organizations of different sizes and industries have different priorities and perceptions of video in the workplace. However, we felt that including participants from the entire enterprise community was important, with the topic being so fundamental to all. Note that we did not report every single case of different results, since reporting this in an exhaustive manner is not practical and would impact the readability of the report. If you are interested in receiving information on anything specific that was not reported, please contact us at survey@kaltura.com.



About Us

Kaltura's mission is to power any video experience. A recognized leader in the OTT TV (Over the Top TV), OVP (Online Video Platform), EdVP (Education Video Platform) and EVP (Enterprise Video Platform) markets, Kaltura has emerged as the fastest growing video platform, and as the one with the widest use-case and appeal. Kaltura is deployed globally in thousands of educational institutions, enterprises, media companies, and service providers and engages hundreds of millions of viewers at school, at work, and at home.

For more information visit: <https://corp.kaltura.com/>

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