Fifth Annual

STATE OF VIDEO IN THE ENTERPRISE 2018

Insights and trends

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About This Report

In our fifth annual "State of Video in the Enterprise" report, Kaltura surveyed professionals from around the world. More than 650 individuals from around the world participated in this year's survey. We wanted to explore:

- How enterprises are using video today
- What impact video is having on business
- How companies approach specific areas including webcasting and video emails
- Where employees see the future of video

As video has spread across every department, we hope this report will help executives and employees in every field gain insight into how companies approach video today. While this is a high level survey that contains mostly questions of general interest, there are some particular areas you may wish to focus on, depending on your role:

- If you are *an executive*, you might want to know more about the **value of video** (p15) as well as specifics of **webcasting** (p18) and **video emails** (p19).
- If you work in *corporate communications*, you might want to know more about **internal use cases** (p7) and the specifics of **webcasting** (p18).
- If you work in *learning and development*, you may be particularly interested in **internal use cases** (p7), the **value of video** (p15), and the **future of video** (p21).
- If you work in *marketing or sales*, you may wish to focus on **external use cases** (p8) and **video emails** (p19).
- If you work in *IT*, you may be particularly interested in why employees **create video** (p12), the **challenges to video adoption** (p16) and the **future of video** (p21).

Executive Summary

Video continues to increase in popularity across every department, with companies embracing multiple use cases, both internal and external. Large companies (10,000+ employees) in particular turn to video to solve multiple challenges.

Specialized uses of video such as webcasting and video emails are reaching tipping points in adoption, and enthusiasm is high for additional video technologies in the future.

- **Video use in the enterprise continues to grow.**

  98% of respondents see video use in their organization as steady or growing. While marketing continues to be one of the most popular use cases, training has become another major use. 24% more companies report using video for training customers and other external parties since 2017. Meanwhile, nearly 75% use video for internal learning and development.

- **Webcasting has become a regular practice, especially for large enterprises.**

  76% of large companies run at least 1 webcast/year. 46% average at least 1 webcast/month and 27% average at least 1 webcast/week

- **Employees' video obsession extends to work—they create as much video for professional reasons as they do in their personal lives!**

  62% of respondents create one or more videos every month in their personal lives, while 63% do so for work. 10% create at least one video for professional purposes a day.

- **Large companies have embraced video with enthusiasm.**

  Across almost every tool and use case, large companies use video much more heavily than enterprises in general. More use cases, more video created by employees, more webcasts.

- **Enterprises see a high value for video, especially for video communication and learning.**

  98% say video is valuable for improving communication and for training employees better and faster. Other areas in which video is thought to have a positive impact include connecting geographically-dispersed employees (95%), increasing brand awareness and lead generation (93%), and empowering employees to share knowledge (93%).

# Video Usage

The Rise of Video in Business

Video has extended through every aspect of business, from advertising through knowledge centers through video conferencing. So it's not surprising that respondents expect video usage to continue to rise.

In total, 98% of organizations, see overall video usage as either increasing (86%) or remaining steady (12%). This year, 86% saw video use in their particular organization as growing, with another 12% expecting it to stay steady.

Last year, 84% viewed video usage as increasing over time (with the same 12% predicting no change), so this trend is continuing to pick up steam.

98% see video use in their organization as steady or growing

What do you see as the trend for usage of video overall in your organization?

2%

12%

86%

■ Increasing over time
■ Remaining flat
■ Decreasing over time
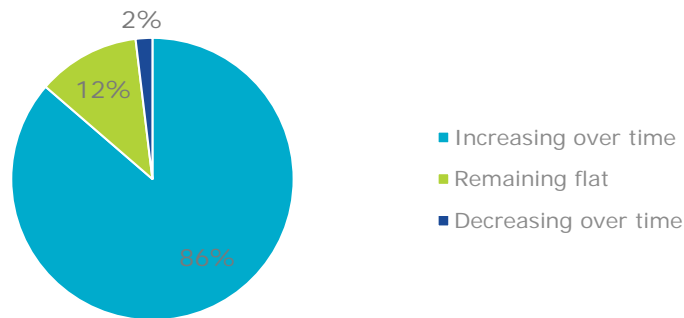
Comparing to 2017

	2018	2017
Decreasing over time	2%	4%
Remaining flat	12%	12%
Increasing over time	86%	84%

Using Video to Communicate Inside the Company

Video has become incredibly popular for communicating within companies, as an efficient and appealing way to transfer information quickly.

Compared to last year, the big winner is live broadcast. Large companies using live broadcast increased from 60% to 80%, a 33% increase. (Overall, live broadcast increased from 40% to 50%, a 26% jump.) Live broadcast appears to be hitting a tipping point, as technologies become easier to support and more CEOs consider themselves video-first.
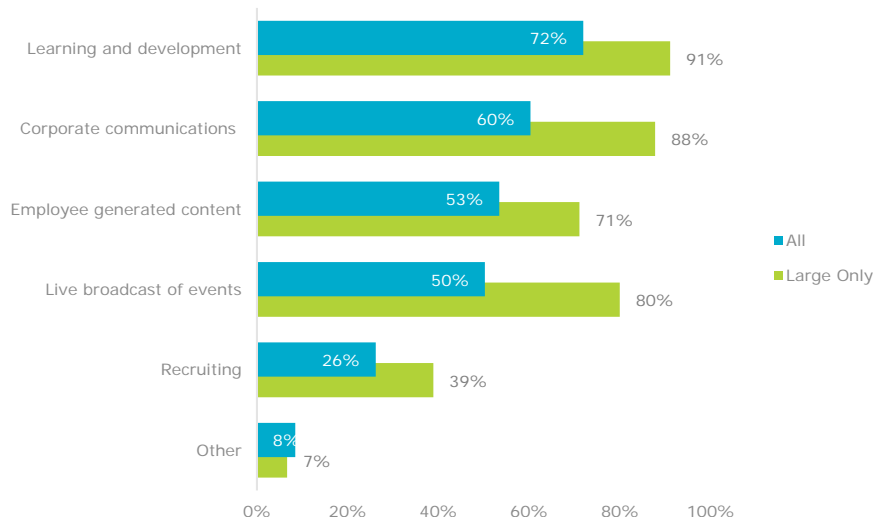
The most popular use for video within a company is employee learning, development, onboarding, and compliance training. Nearly three-quarters of respondents report using video for this purpose. When considering large companies only, this number jumps to 91%; nearly all very large companies use video for their training efforts.

There's a similar gap for corporate communications (executive messaging, product launches, status updates, announcements, etc.), employee-generated content (such as sharing best practices or how-to tutorials), and live broadcast of company events (such as town hall meetings). 60% of all companies report using video for corporate communications, compared with 88% of large companies. 50% broadcast events live, compared with 80% of large companies. And 53% of all companies encourage employees to create their own video content, as opposed to 71% of large companies. Large companies have especially embraced video to help their employees communicate and connect.

A little more than a quarter of companies use video in the recruiting process.

Almost three-quarters of organizations use video for training; large companies particularly use video for internal communications

Which of the following internally-facing purposes does your company use video for?

Purpose	All	Large Only
Learning and development	72%	91%
Corporate communications	60%	88%
Employee generated content	53%	71%
Live broadcast of events	50%	80%
Recruiting	26%	39%
Other	8%	7%

See Appendix III for more details.

Using Video to Represent the Company

Marketing videos are often the most high-profile use of video in a company, so it makes sense that 70% of respondents report that their company uses video for digital marketing, including on websites, social media, and in promotional emails.

Similarly, video-based virtual events such as webinars, live event broadcasts, and investor relations calls are run by more than half of businesses.

But ads and events are not the only way to reach out with video. Almost half of respondents report using video for training external parties such as customers, users, partners, and integrators. In addition, 42% report using video for sales, through prospecting email videos, follow up videos in emails, video demos, and more. And 17% use video for customer service or as part of their help desk.
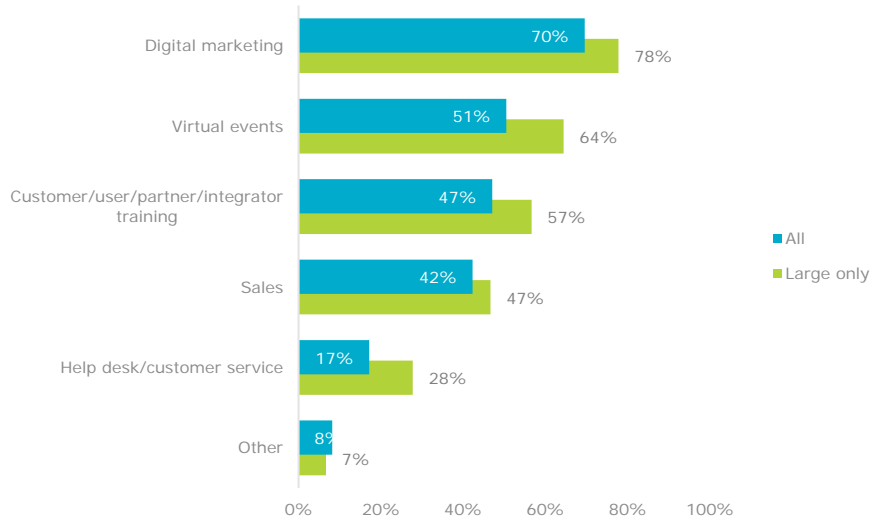
Large companies (10,000+) often have more resources for pursuing multiple use cases, and looking at just their respondents reveals an even stronger tendency to use video. In larger companies, 78% report using video for digital marketing, 64% for virtual events, 57% for external training, 47% for sales, and 28% for support.

In the last year, we've seen some movements in these. For all companies, external training increased from 38% in 2017 to 47% in 2018. That's a jump of nearly a quarter.

For companies in general, video for support has held steady. But when considering just large companies, investments in video for help desks and customer support is increasing. Large companies report video-based customer support growing from 20% in 2017 to 28% now, an increase of almost forty percent.

Marketing heavily uses video; big jumps in video for external training and support

Which of the following externally-facing purposes does your company use video for?

Purpose	All	Large only
Digital marketing	70%	78%
Virtual events	51%	64%
Customer/user/partner/integrator training	47%	57%
Sales	42%	47%
Help desk/customer service	17%	28%
Other	8%	7%

See Appendix III for more details.

Video Across Multiple Departments Within a Company

Strikingly, this year, no respondent reported their company using video for only one single purpose. More than half of companies are using video for five or more use cases.

Digger deeper into the use cases companies choose reveals that the vast majority mixes internal and external use cases. Only 2% reported using video for only internal use cases; 0.3% reported using it only for external use cases.

This trend is even more pronounced for large companies only; 84% use video for 5 or more purposes and 28% use video in 9 or more!

ALL companies that use video use it for more than one purpose.

Total Number of Use Cases

Use Cases	All	Large only
9-11	13%	28%
5-8	39%	57%
2-4	39%	13%
1	0%	
0	9%	2%

Types of use cases

Internal/external mix	98%
Just external	0.3%
Just internal	2%
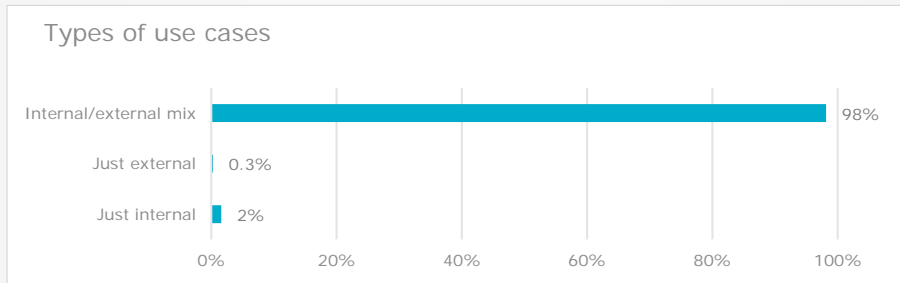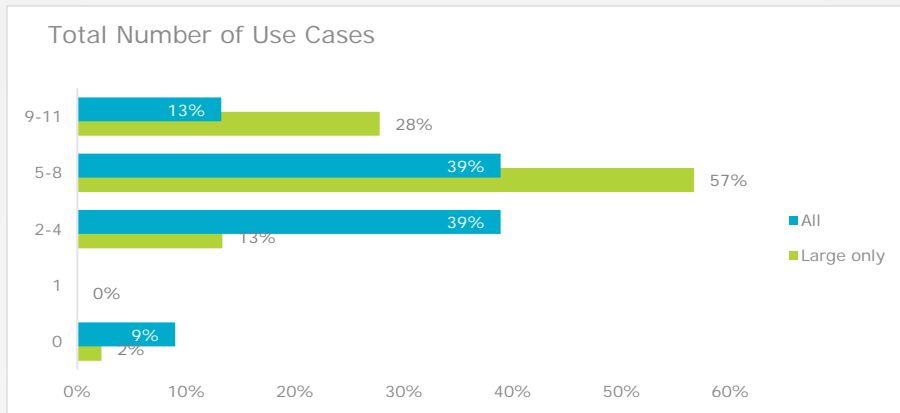
Video Creation

Creating Videos at Home Vs. at Work

While people have been watching moving pictures since the turn of the last century, one measure of how much video has expanded comes from how much video people actively create themselves, versus passively consuming.

People are creating video in their personal lives - sharing events and thoughts with family and friends, demonstrating skills, sending video messages, creating funny videos, and so on. They're also creating video at work - sharing events and thoughts with colleagues, keeping people updated, demonstrating skills, representing the organization, reaching out to clients and prospects, etc.

We had hypothesized, with the growth of social media, that people would be creating far more video in their personal lives than at work. Consumer-grade expectations have been driving employees to use video within the enterprise as they have become accustomed to in their personal lives.

To our surprise, we discovered that people are creating video at work at slightly higher rates as they do at home. Now that they've discovered how easy phones and webcams make it to create video, they're using it actively in their professional lives.

62% of respondents create one or more videos every month in their personal lives, while 63% do so for work. 10% create at least one video for professional purposes a day!

Employees create even more video at work than they do in their personal lives

How much video do you create in your personal life?

Category	Value
Rarely if ever	23%
At least one a year	14%
At least one a month	26%
At least one a week	28%
At least one a day	8%
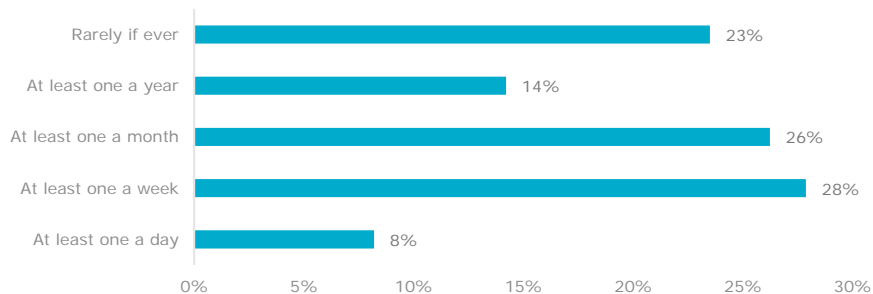
How much video do you create in your work life?

Category	Value
Rarely if ever	21%
At least one a year	15%
At least one a month	28%
At least one a week	25%
At least one a day	10%
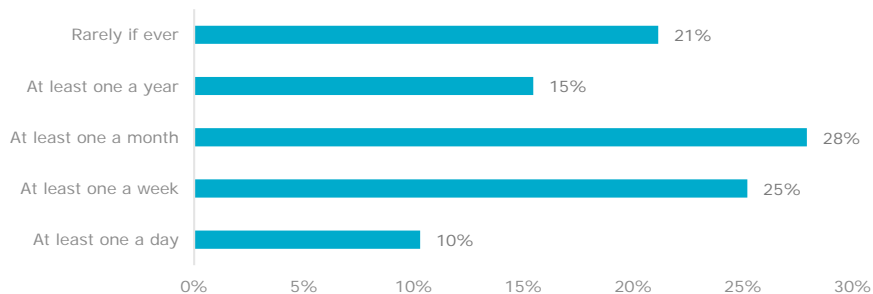
Employees Creating Marketing Videos, Product Demos, and Much More

What are employees creating videos to do? So many purposes!

More than half of respondents say employees at their company create their own videos for marketing (52%) and product demonstrations (51%). 45% report creating videos to serve as how-to videos for fellow employees and for customers, as well as for webinars.

Large companies' employees are much more likely to create videos, for a wide array of uses. More than half report employees creating video not only for the above use cases, but also for webcasts and recordings of company events, communications from managers and executives, recording of video calls, and company pride/morale-boosting videos. The biggest gaps between all companies and large companies only are found for recordings of company events and communications from executives, which makes sense. The larger a company is, the greater the need for sharing personal communications at scale.
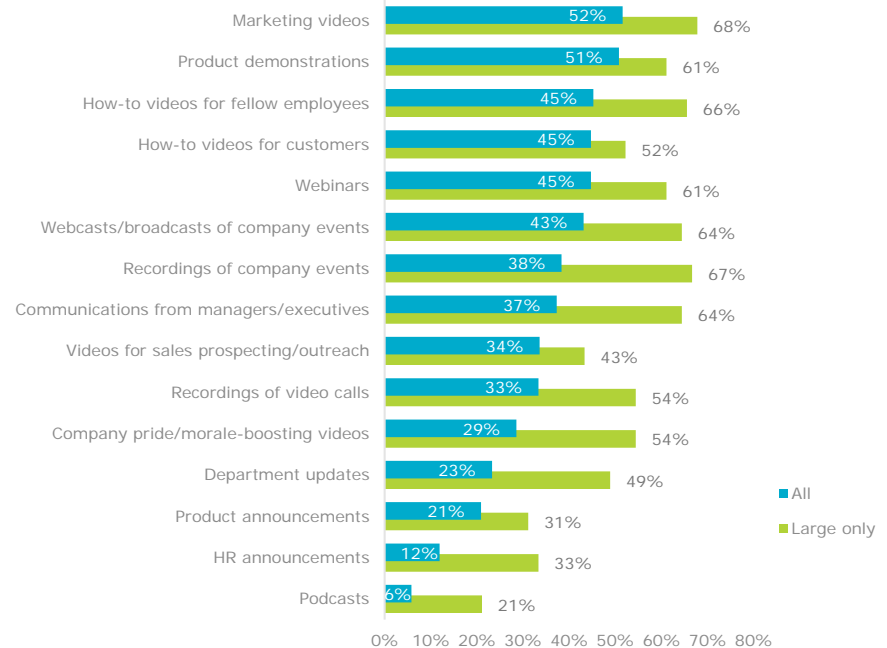
An interesting emerging use case is the podcast – 21% of large companies have employees creating their own video podcasts.

A note: when compared to the use cases questions earlier in the survey, some of these (including marketing and sales) have lower totals. The difference most likely is in the origin of the videos—this question focuses on which videos employees create themselves, as opposed to the earlier questions which focused on which videos are used by the company. Sales and marketing videos in particular are often created by outside agencies. The fact that so many of these videos are being created by employees themselves says a lot about employees' increasing comfort with video.

Large companies especially encouraging employees to create videos for a wide variety of uses

What kinds of videos do employees at your organization create?

Type	All	Large only
Marketing videos	52%	68%
Product demonstrations	51%	61%
How-to videos for fellow employees	45%	66%
How-to videos for customers	45%	52%
Webinars	45%	61%
Webcasts/broadcasts of company events	43%	64%
Recordings of company events	38%	67%
Communications from managers/executives	37%	64%
Videos for sales prospecting/outreach	34%	43%
Recordings of video calls	33%	54%
Company pride/morale-boosting videos	29%	54%
Department updates	23%	49%
Product announcements	21%	31%
HR announcements	12%	33%
Podcasts	6%	21%

0% 10% 20% 30% 40% 50% 60% 70% 80%

Other Use Cases?

We listed some of the purposes we most often see for video in the enterprise, but that's hardly exhaustive. We wanted to know some of the other ways businesses are using video. So we left this one open-ended. Here are some of the creative ways respondents told us that they were using video, in their own words.

- Replacing meetings: standing meetings, departmental group meetings, introductions, one-off sidebar meetings
- Patient education
- Recording court and legal matters and family interaction
- Teaching kitchen personnel
- Videos of home visits
- Inspection of assets using bots
- Live broadcasts: Religious programs, news, sports, weather
- Event support
- Content as a Service or broadcasts to subscribers
- As part of research coverage and reports

- Advertising and fundraising campaigns
- Trailers and promos
- Fan films
- Everything!

The Value and Challenges of Video

Why Use Video?

Why are companies creating and using so much video? Video serves a number of goals within an organization, providing multiple returns on the investment.
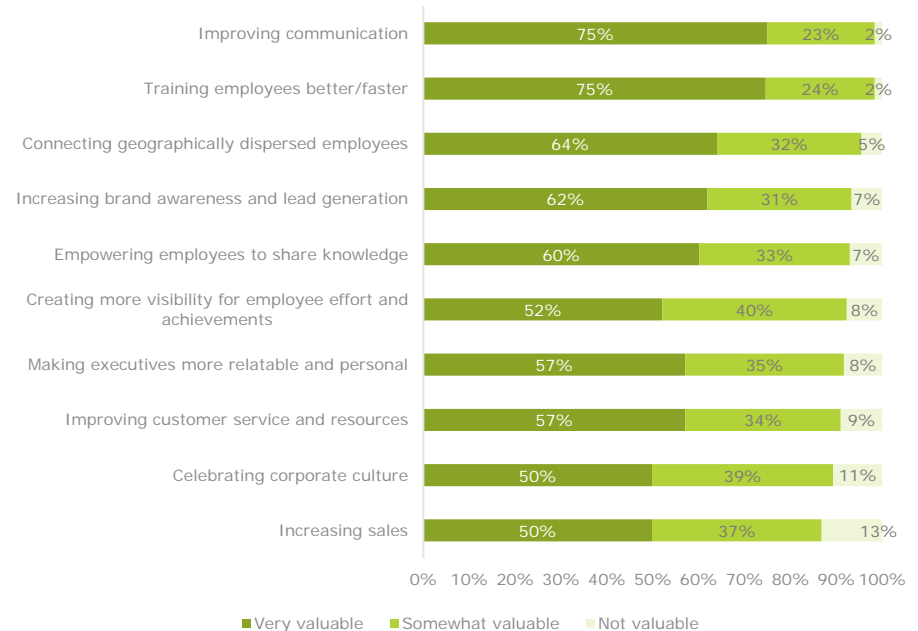
The two most popular reasons to use video, cited by 98% of respondents as being valuable, were "Improving communication" and "Training employees better/faster".

Other reasons cited for video's value by more than 90% of respondents include "Connecting geographically-dispersed employees" (95%), "Increasing brand awareness and lead generation" (93%), "Empowering employees to share knowledge" (93%), "Creating more visibility for employee effort and achievements" (92%), "Making executives more relatable and personal" (92%), and "Improving customer service and resources" (91%).

These values have stayed essentially stable over the five years we have conducted this study; video's popularity is no fad.

98% say video is valuable for improving communication and for training employees better and faster

How much value do you believe that video brings to the following goals at your organization?

Goal	Very valuable	Somewhat valuable	Not valuable
Improving communication	75%	23%	2%
Training employees better/faster	75%	24%	2%
Connecting geographically dispersed employees	64%	32%	5%
Increasing brand awareness and lead generation	62%	31%	7%
Empowering employees to share knowledge	60%	33%	7%
Creating more visibility for employee effort and achievements	52%	40%	8%
Making executives more relatable and personal	57%	35%	8%
Improving customer service and resources	57%	34%	9%
Celebrating corporate culture	50%	39%	11%
Increasing sales	50%	37%	13%

■ Very valuable ■ Somewhat valuable ■ Not valuable

See Appendix IV for more details.
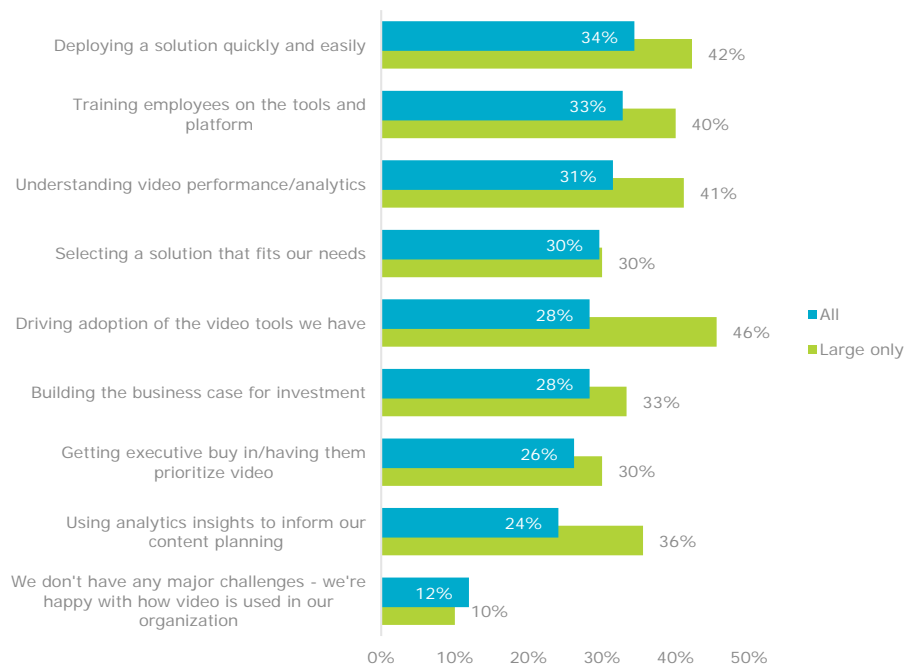
What Keeps Employees from Using Video?

If video is widely acknowledged to have value across the organization, what challenges keep it from being adopted even further?

Respondents were allowed to choose more than one option; their answers ended up spread relatively evenly across a number of options without any one dominating challenge. The most frequently cited problems were deployment and training, but not by much.

What is very interesting, though, is that just as large companies were more likely to use many use cases and more likely to have employees creating more video, they are also more likely to recognize challenges to driving adoption of video. Particularly interesting is the gap for "Driving adoption of the video tools we have" – only 28% of the general population cited this as a challenge for their organization, but 46% of large company respondents did, with this challenge being chosen most often by the large organizations. While there is not enough data to know for sure, it seems likely that large companies are farther along the curve of obtaining video technology and so running up against resistance that may be encountered by their smaller peers as they catch up.

Large organizations have more trouble driving adoption of the video tools they already have

What are your biggest challenges when it comes to using video or driving adoption?

Challenge	All	Large only
Deploying a solution quickly and easily	34%	42%
Training employees on the tools and platform	33%	40%
Understanding video performance/analytics	31%	41%
Selecting a solution that fits our needs	30%	30%
Driving adoption of the video tools we have	28%	46%
Building the business case for investment	28%	33%
Getting executive buy in/having them prioritize video	26%	30%
Using analytics insights to inform our content planning	24%	36%
We don't have any major challenges - we're happy with how video is used in our organization	12%	10%

Specific Video Technologies

Widespread Adoption of Webcasting

Webcasting: a media presentation, by a single or multiple speakers, distributed over the Internet to many simultaneous viewers. As opposed to web conferencing, which is an online meeting and collaboration solution.

Many organizations are increasingly using webcasting for large scale communications.

Over half (53%) of respondents' companies run at least one webcast a year; a quarter of them average at least one a month. Of the respondents whose companies do not use webcasting, 38% wish that they did.

76% of *large* companies run at least 1 webcast/year

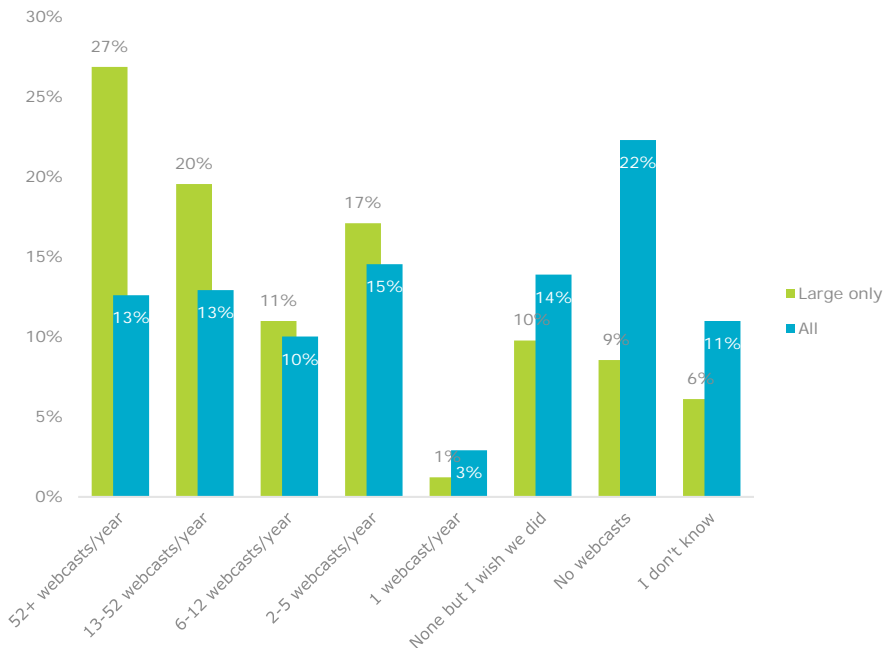**46%** of *large* companies average at least 1 webcast/month

27% of *large* companies average at least 1 webcast/week

Large companies have embraced webcasting even more strongly. More than three-quarters run at least one webcast a year. 46% of them run at least 13 a year, and 27% run more than 52 webcasts a year!

Only 19% report not using webcasting at all, and 53% of those wish that their company used webcasting.

53% of *all* organizations run at least one webcast a year; one quarter averaging at least one per month

How does your organization approach webcasting?

Legend: ■ Large only ■ All

Category	Large only	All
52+ webcasts/year	27%	13%
13-52 webcasts/year	20%	13%
6-12 webcasts/year	11%	10%
2-5 webcasts/year	17%	15%
1 webcast/year	1%	3%
None but I wish we did	10%	14%
No webcasts	9%	22%
I don't know	6%	11%

Video as Part of Emails

Video emails: *emails with a video component embedded, linking to a playable video. Usually using an image of the video player with a play button as the anchor, for easy identification and playback.*

Using video messages in emails, either to communicate with colleagues or to reach out to customers and prospects, is also a rising trend.

45% of companies are using videos in their emails, whether for internal or external communications. In total 66% are either using video-based emails or wish their company used them.
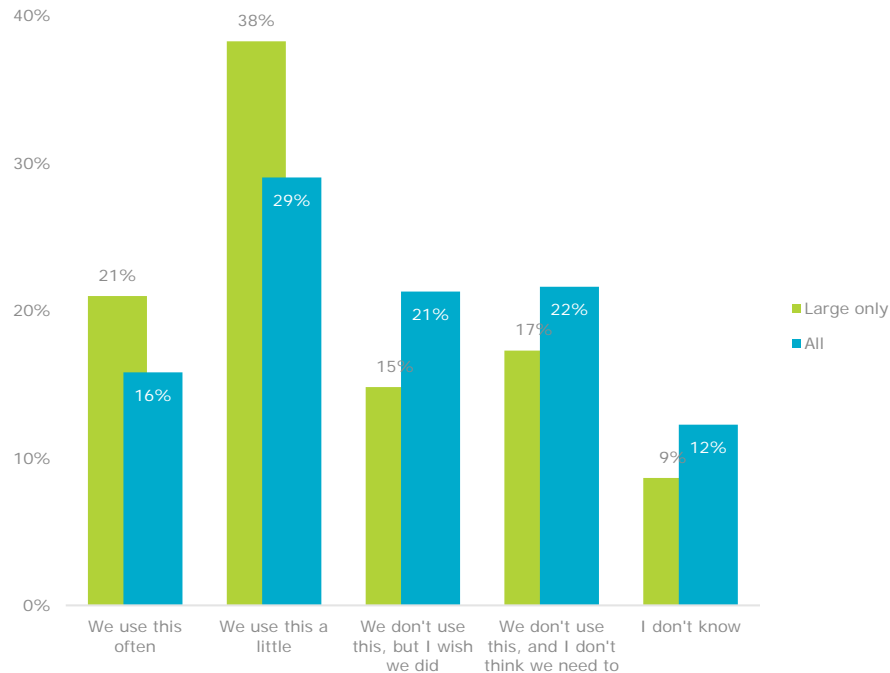
66% of all companies either use video emails or wish they did

74% of large companies either use video emails or wish they did

In large companies, as might be expected, these numbers were even higher. 59% reported that their companies already used video emails. In total, 74% like the idea, having already used them or wishing their company supported the technology.

59% of large companies using video in emails

How does your organization approach video emails?

	We use this often	We use this a little	We don't use this, but I wish we did	We don't use this, and I don't think we need to	I don't know
Large only	21%	38%	15%	17%	9%
All	16%	29%	21%	22%	12%

The Future of Video

The Future of Video in the Enterprise

How will video use in the enterprise change in the next 18-24 months? Some key trends emerged.

Integration

Increasingly, video will not be a standalone technology. **99%** of respondents agreed, **77%** of them strongly, that video technology will become increasingly integrated with other platforms, such as social business software, learning management systems, and so on.

Build It Yourself

There has been an increasing trend of companies incorporating video not just into the platforms they use, but the ones they're creating, leading to a rise in Video-Platform-as-a-Service (VPaaS). **96%** believe companies will increasingly build video into their core technologies and products, from learning solutions to news platforms to healthcare software to collaboration platforms.
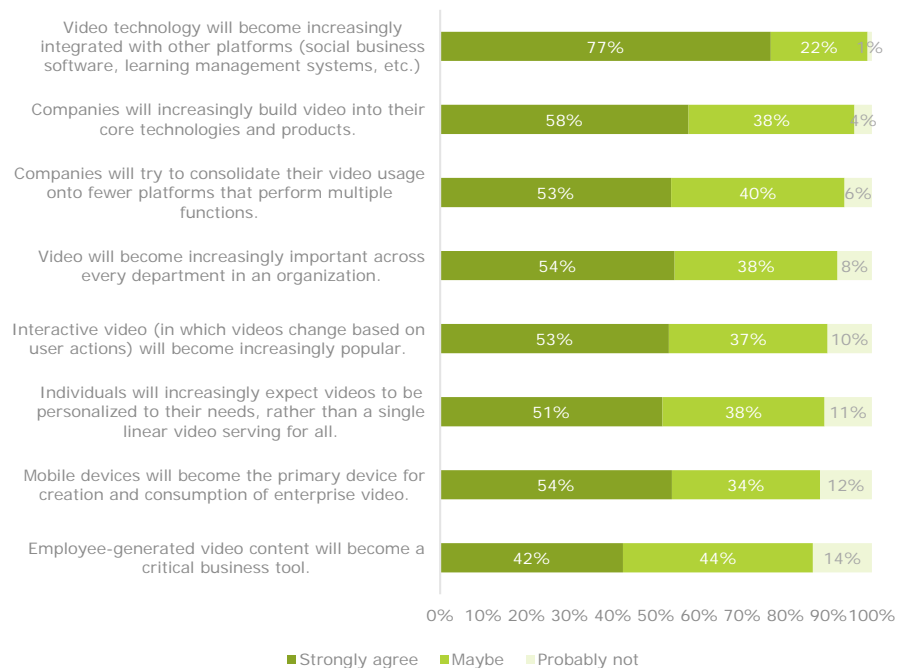
Consolidation

With so many different video platforms and technologies available, many companies are looking to simplify. **94%** believe companies will try to consolidate their video usage onto fewer platforms that perform multiple functions.

Ubiquity

Which departments *don't* use video? Tomorrow's answer may be "none." **92%** of respondents agree that video will become increasingly important across every department in an organization.

Respondents project video use will continue to increase in sophistication in the next two years.

How much do you agree with the following statements regarding video in the next 18-24 months?

Statement	Strongly agree	Maybe	Probably not
Video technology will become increasingly integrated with other platforms (social business software, learning management systems, etc.)	77%	22%	1%
Companies will increasingly build video into their core technologies and products.	58%	38%	4%
Companies will try to consolidate their video usage onto fewer platforms that perform multiple functions.	53%	40%	6%
Video will become increasingly important across every department in an organization.	54%	38%	8%
Interactive video (in which videos change based on user actions) will become increasingly popular.	53%	37%	10%
Individuals will increasingly expect videos to be personalized to their needs, rather than a single linear video serving for all.	51%	38%	11%
Mobile devices will become the primary device for creation and consumption of enterprise video.	54%	34%	12%
Employee-generated video content will become a critical business tool.	42%	44%	14%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

■ Strongly agree ■ Maybe ■ Probably not

Interactivity

Videos are becoming more intelligent, allowing viewers to interact with them and even changing based on those interactions. **90%** think interactive videos (in which videos change based on user actions) will become increasingly popular.

Personalization

Just as so many aspects of life have become personalized, it's increasingly possible to apply personalization to video. **89%** believe individuals will increasingly expect videos to be personalized to their needs, rather than a single linear video serving for all.

Mobile Video

More and more of our lives, including professional lives, happens on our phones. **88%** of respondents agree that mobile devices will become the primary device for creation and consumption of enterprise video in the next two years.

UGC Meets EGC

As large companies especially give their employees more tools to create their own videos, expect business-related video to become increasing democratized. **86%** think employee-generated video content will become a critical business tool.

When we compared large companies' responses against responses in general, we expected to find that large companies were more interested in some of these technologies. Instead, we found that answers to be basically the same for each question, within a couple percentage points of each other. While there are differences in the current practices of large companies, everyone has similar, positive views of the future.

Appendices

Appendix I. Methodology

This survey is our fifth survey on the topic, serving as an anonymous, statistically significant exploration of the usage, perception, and trends of video in 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 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.
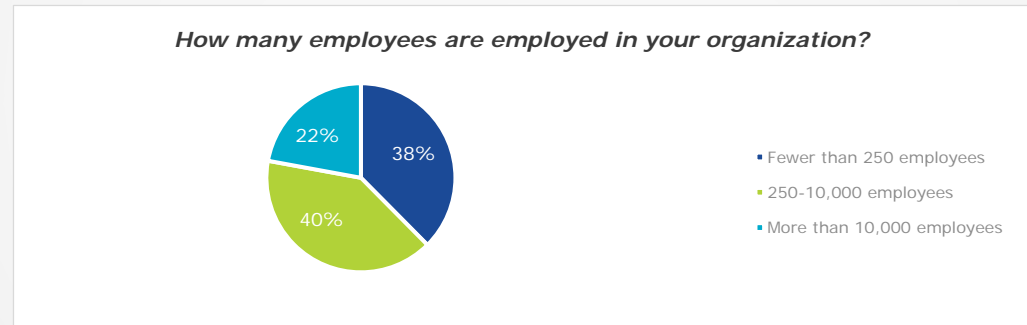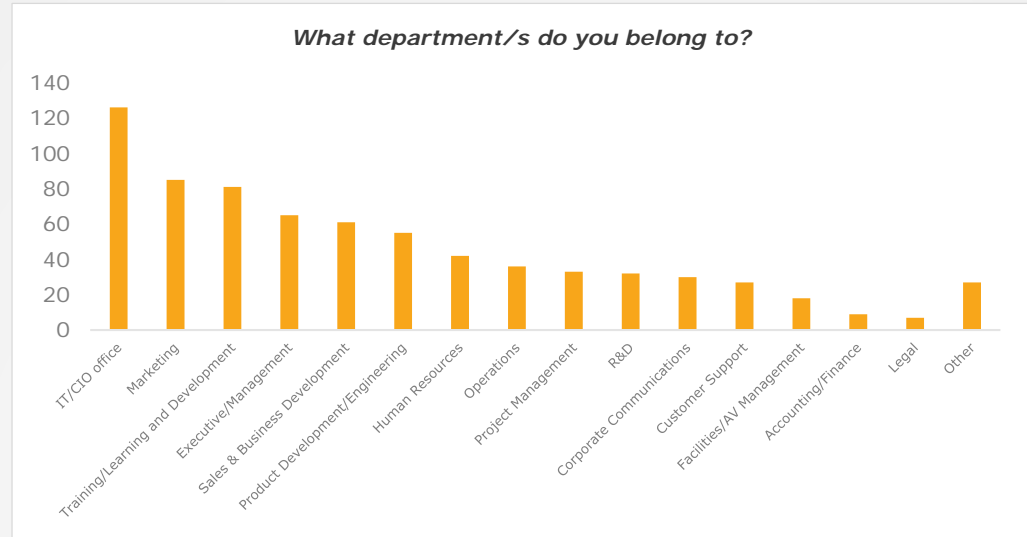
Appendix II. *Demographics*

Respondents filled many roles (some of them filling more than one role). The greatest number of participants identified themselves as coming from IT, followed by Marketing and Training/Learning and Development. Management, Sales, and Product Development were also strongly represented, followed by a number of other positions across organizations from HR to legal.

Respondents came from small (fewer than 250 employees) and medium sized (250-10,000 employees) companies in roughly equal proportions of about 40% each, with an additional 22% coming from large (more than 10,000 employees) companies.

The survey was conducted online during Sept 2018, in English.

What department/s do you belong to?

How many employees are employed in your organization?

- Fewer than 250 employees
- 250-10,000 employees
- More than 10,000 employees

Appendix III. Changing Use Cases Over Time

There have been some changes in the exact wording of the questions, which makes comparisons in some categories impossible.

For this reason, we are not comparing recruiting or employee learning for the internal use cases, or digital marketing and virtual events for external use cases.

Use Case	2018		2017		% change	
	Large only	All	Large only	All	Large only	All
Internal Use Cases						
Help desk/customer service	28%	17%	20%	17%	*39%*	*1%*
Sales	47%	42%	46%	45%	*1%*	*-6%*
Customer/user/partner/integrator training	57%	47%	48%	38%	*18%*	*24%*
External Use Cases						
Live broadcast of events	80%	50%	60%	40%	*33%*	*26%*
Employee generated content	71%	53%	69%	47%	*3%*	*14%*
Corporate communications	88%	60%	84%	59%	*4%*	*2%*

Appendix IV. *Unchanging Value*

Similarly, there have been some changes in the exact wording of the questions of how much value respondents believe video brings to the following goals, which makes comparisons in some categories impossible.

For this reason, we are not comparing increasing brand awareness and lead generation, increasing sales, or improving customer service and resources.

Value Video Brings an Organization	2014	2015	2016	2017	2018	Change
Training employees better/faster		96%	96%	98%	98%	0%
Improving Communication	93%	98%	96%	98%	98%	0%
Connecting geographically dispersed employees	88%	94%	94%	93%	95%	2%
Making executives more relatable and personal	91%	91%	92%	94%	92%	-2%
Empowering employees to share knowledge	95%	91%	91%	97%	93%	-4%
Celebrating corporate culture	86%	90%	90%	92%	89%	-3%
Creating more visibility for employee effort and achievements		92%	90%	87%	92%	5%

Value over Time