



The Aragon Research Globe™ for Enterprise Video, 2023

Video as a Key Ingredient in Business Transformation

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Issue: Who are the vendors that are making a difference in enterprise video?



SUMMARY

Aragon Research releases its Aragon Research Globe™ for Enterprise Video. It examines 14 providers in a market that is becoming a key ingredient in the race to transform the enterprise.

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Introduction

Increasingly, enterprises are understanding the role of video as an important part of the business, just as the demand from employees and customers is surging, thanks to consumer tools such as Instagram and TikTok. While there was increased interest and usage of video in 2022, for 2023, the need is for better access to video and the rise of short-form video, also called MicroVideo.

Enterprise video providers face the challenge of offering a robust platform where all video content can be stored and accessed, as well as offering the use cases that compel enterprises to buy. The need to focus on employee and customer experiences has not changed. What has changed is the emergence of intelligence and, with it, the ability to find and summarize video like never before. This Aragon Research Globe evaluates 14 providers who are making a difference in enterprise video.

Enterprise video providers today are in a market that faces overlap with video conferencing, but with the advantage of providing a much more robust ability to manage and find video content. Existing use cases are giving way to new ones, and providers that can balance the mix of old and new will win in the short and long term.

Low Code Video Creation and Editing—the Shift to Mobile

Over the last 18 months, consumer demand for video content has soared, and so has the demand for mobile video editing tools. High-end produced video is still edited using traditional tools such as Adobe Premiere and Apple Final Cut Pro, but the world is changing.

In enterprise video, more providers have made it easier to edit videos, particularly when it comes to small, lightweight alterations. In some cases, this can be done without having to transcode the video again. Providers that are bundling creation and editing tools include Brightcove, Haivision, IBM, Kaltura, Panopto, Sonic Foundry, and Vbrick.

For user-generated content, a new era is here, and Aragon feels that mobile video editing has quickly become the standard way users want to edit their videos. Enterprises need to embrace user-generated content, and—if and when they do—they will need tools for their users. See Figure 1 below for a list of traditional video editing tools and the new generation of mobile video editing.

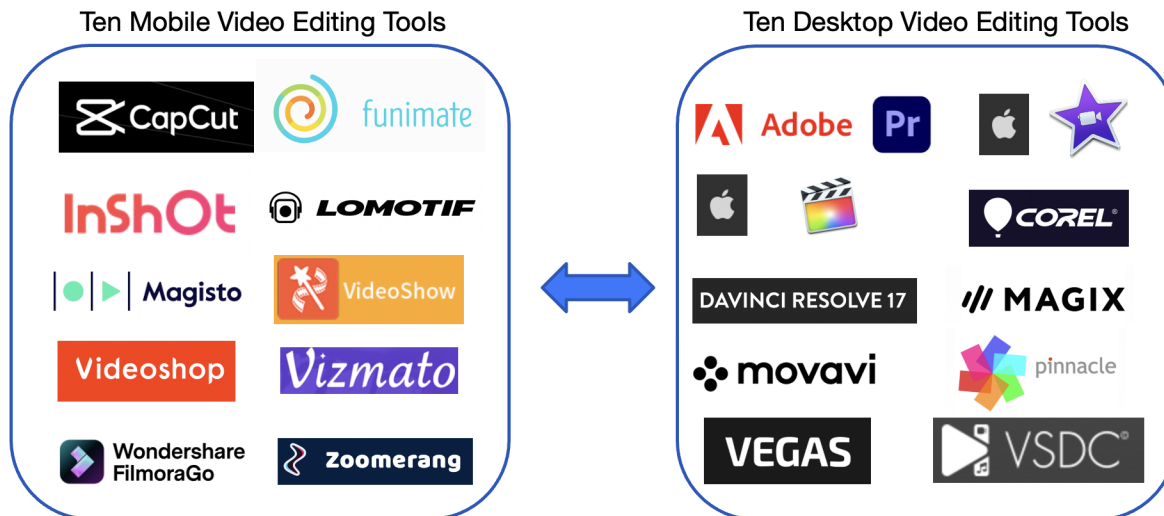


Figure 1: Comparing mobile and desktop video editing tools.

Why Intelligent Microvideo in 2023?

One of the reasons for the massive surge in demand for TikTok and for Instagram Reels is that the application adapts to what the user is viewing. This essentially represents a new way to deliver knowledge and learning content by shifting the application's ability to recommend related content that may be tied to a specific job or specific set of skills.

What Is Intelligent MicroVideo? Personalization at Scale

With AI embedded that leverages computer vision, a platform can determine what a user is watching based on the images in the video or the meta-tagging tied to a MicroVideo so that similar videos can be shared with that user. Consumer platforms such as Instagram Reels and ByteDance's TikTok offer these capabilities. With this level of intelligence, the automation of skills-based video delivery training is possible.

User-generated video content is also easier to share and can be part of a custom learning path. Users can also replay key scenes of either a class recording or a how-to video repeatedly until they are sure they understand and can move forward. Replay accessibility makes video one of the fastest ways to learn a new task or procedure.

Prediction: By year-end 2024, 40% of enterprises will have deployed their own versions of MicroVideo (60% probability).

Intelligent Video Leads to Faster Outcomes

Seeing is believing, and that is what video can do for employees and customers. Whether it is executive communications, training, or support, video content helps to speed up the process. Video usage in the enterprise increased during COVID, and there is no turning back.

Video usage in sales and support continues to grow. It also is being used much more for employee experience, including both ad hoc and for employee onboarding and ongoing training.

The reason that people want video is due to all the benefits it offers—this is in part because people are visually centered. There are several benefits of video content that, once understood, should continue to drive demand.

Computer Vision at the Edge: AI in Cameras and Smartphones

Because of the need to understand objects and scenes, an edge architecture has emerged to support video data. Video AI—also called computer vision—offers algorithms that can now run on phones and in cameras.

Aragon has examined several vendors, and many of them offer intelligence in their cameras. Cisco, Google, and others now offer intelligent cameras that leverage video AI, and on the commercial side, many other camera manufacturers have camera models with built-in computer vision.

Apple, Google, and Samsung all offer advanced image processing on their respective models. Both pictures and videos can be enhanced significantly due to the AI-based image processing that each provider offers.

For user-generated content, enterprises now have very high-quality capture devices in the hands of nearly every associate and every customer. However, the issue is whether an enterprise is embracing video as a means of sharing information and how-tos. This must happen first. Although employees are sharing videos nearly every day, many enterprises are not capitalizing on this trend.

The Benefits of Video—Learning and Knowledge Transfer

The speed at which information can be conveyed using video has a tremendous lasting impact on users. They can remember what they saw because humans are, in essence, visual beings. The benefits of video content include the following:

- Immediate recognition: video images are processed 60,000x faster than text.
- Visual recall: humans have up to 80% recall of videos seen in the last 30 days.
- Video is the fastest way to learn and recall a complex or new topic.
- Video increases learner engagement, participation, and satisfaction.

Enterprise Video—The Return of Video Content Management

Today, users want access to video, and while the growing consumption experience will be on mobile devices, the need to be able to manage video content is now greater than ever.

As demand for both produced video content and user-generated video content grows, video content management, which is how this market got its start, is now more important than ever before.

Enterprise Video Portal—Managing Internal and External Content

The demand for video is here, and accessing video content demands more than just storing the video in a file-sharing system or cloud repository. There are several key capabilities that enterprises should evaluate carefully when looking at enterprise video providers (see Note 1).

Note 1: Enterprise Video Platform Architecture

1. Capture/Recording and Publishing

- Ability to capture, tag, and edit a video recording
- Ability to publish

2. Video Content Management/Portal

- Ability to store video content and display it in different modes for users
- Ability to deliver video content to multiple devices (includes transcoding)
- Ability to provide delivery of video content to global locations
- Ability to search for content
- APIs for integration

3. Live Video: Streaming Internal or External

- Ability to deliver a live broadcast to a large number of users
- Ability to record the live broadcast for later use
- The ability to connect with existing video conferencing systems for capture or for broadcast federation

4. Computer Vision

- The ability to analyze what is happening in a video, either live or after the fact
- The ability to recognize people and images in a video or image
- The ability to recognize the sentiment of people talking in a video

As remote work becomes the norm, even managing recordings has become cumbersome. EV providers are meeting this need by providing easy access to recorded townhalls and meetings.

For events, which have also gone virtual, video is becoming a must-have feature—even just to gain and keep attendees. More than 50% of the views of an event happen after the event. So, here too, having a video platform becomes even more critical.

Some platforms feature advanced analytics for faster location of critical scenes. For all these use cases, video playback is key. Automatic transcoding and built-in global caching for fast playback have become essential.

The Use Cases Driving Revenue Today

Leveraging Video for the Marketing Use Case

There are two major trends in customer-facing content. First, websites use digital asset management (DAM) to share images and videos, but the website is still driving the image and video calls. And second, new marketing offerings that provide full video experiences have EV offerings front and center—providing robust and embedded capabilities.

In many cases, video content management and DAM are overlapping technologies. DAM is tied more to rich media for websites and managing lots of image and video assets. In some cases, the scalability of managing large volumes of video can be matched by DAM providers, so it is more about the use case and the specific functionality.

Prediction: *By year-end 2026, the DAM and EV markets will begin to converge, in part due to overlapping use cases (60% probability).*

Video Learning—Training and Microvideo

Given remote work, teaching employees and customers via online classes, or ‘virtual classrooms,’ is still growing. In fact, it is the go-to choice for live instruction. At the same time, demand for short-form video is growing (see MicroVideo section above).

As enterprises continue to leverage virtual classes, they may want to recover the real estate associated with classrooms since it is often a cost in many locations.

Because learning is now part of employee experience, we are seeing both collaboration and employee experience providers jumping on the trend of enabling employees to share best practices, such as how-to videos, in a secure and safe manner.

Virtual Events vs. Webinars—the Need for Scalable Video

While virtual events are still here, so are hybrid events. Providers that only focus on virtual events and townhalls are increasingly facing competition from webinar providers, who now offer large-scale virtual events. A number of EV providers have expanded their townhall feature sets to add a more robust external events capability. They are doing this either via organic development or, in the case of Brightcove and Kaltura, via acquisition. While town halls and large employee gatherings are needed now more than ever, external events are here to stay.

External events are more complex than townhalls. They require more workflow than a townhall and need to incorporate multiple tracks and have sponsor areas. Virtual events are now included in the category of hybrid events, as enterprises are still hedging their bets regarding in-person events.

One of the issues with some of the available event tools is that they don't have integration with enterprise video platforms. Some vendors, such as Kaltura, have made their platforms available to partners.

Lecture Capture Keeps on Giving

Lecture capture could be viewed as the gift that keeps on giving. The key market for lecture capture is higher education, both undergraduate as well as continuing education. There is still growth in this segment, and some providers still leverage hardware for capturing content.

Lecture capture is all about leveraging live instruction. One of the opportunities for enterprise video providers is to look at lecture capture for corporate training, which could be a revenue source.

Video Podcasting on the Rise

For regular communications, video podcasting has emerged as a growing use case for sales. The need to constantly communicate is never ending. The idea behind this is that it is fast, easy, and fully mobile-enabled. Podcasting continues to be one of the mediums that has emerged as an alternative to webinars and live broadcasts.

One of the advantages of the podcasting approach is that it is on-demand; so, while townhalls and events can be a source of podcast material, the idea of topic-based channels and regular delivery make podcasting a very attractive approach with more consistent and regular delivery.

Additionally, video-enabled live broadcasts can provide a robust environment for

communication and collaboration between internal and external parties. Today, the need to manage these video assets is critical because search capabilities have become much stronger, and users want to be able to find and play recordings at will. This is where enterprise video providers step in by providing the platform to manage this growing body of video content.

Use Cases Driving Demand in the Future

Interactive Video: Shopping and Employee Experience

One of the fast-growing use cases is interactive video, which makes shopping experiences more immersive. Users can be guided to take actions in the video itself, and from what we have seen, the click rates are high. So, besides starting a custom journey using a video and buttons, commerce can be enabled as well with a 'buy now' button.

Not only can interactive video be used with prospects and customers, but it can also be used to improve and enhance the employee experience with onboarding videos and more (see Figure 2 below).

As demand for interactive video grows, we expect more providers to offer this. To date, Brightcove and Vimeo are the two providers that offer interactive video.

Prediction: *By year-end 2025, 50% of enterprise video providers will add interactive video to their platform, based on growing customer demand (80% probability).*

Telehealth—Live Sessions and the need to Manage Recordings

Telehealth continued to grow in 2023 due to the need to connect with medical professionals remotely. While the initial focus of telehealth is on the live video meeting, we do expect that over time there will be a larger need to save those recordings for later access by both the doctor and the patient. Just as with digital workplace meetings, telehealth is a form of meeting, and Aragon feels there will be long-term archival needs for certain types of telehealth use cases.

Larger healthcare providers will have the resources to invest in video platforms to make these types of resources available. Additionally, this opens the market for healthcare-focused video content that can be licensed and delivered via enterprise video providers. Recently, Ericsson announced that it was acquiring Vonage, in part because of the opportunity it sees with 5G and telehealth.

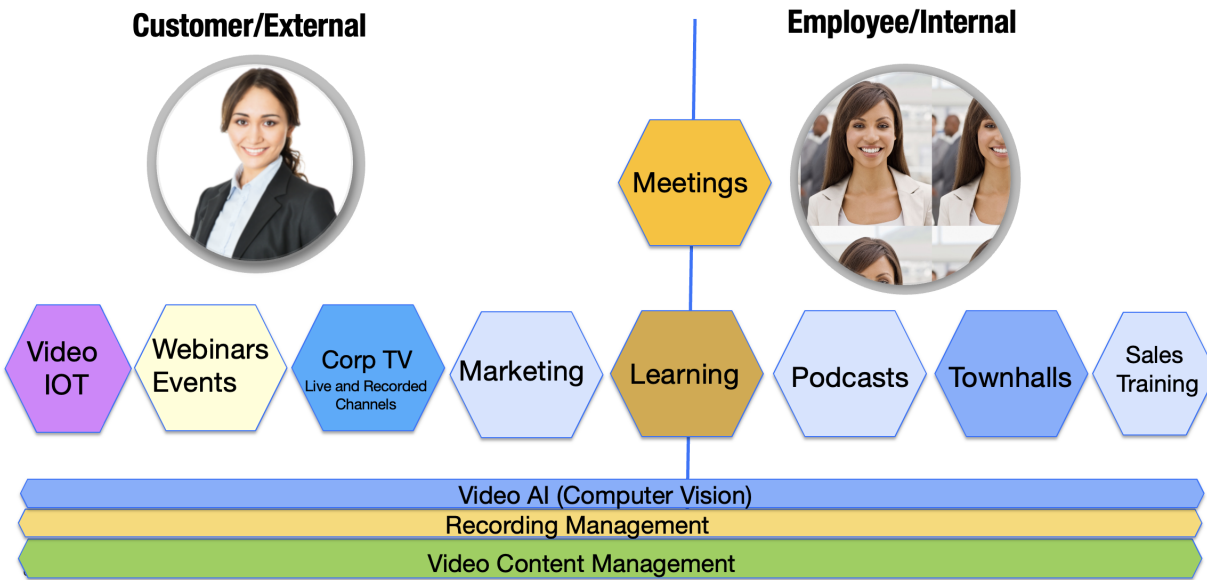


Figure 2: Enterprise video architectures are changing, and so are video-led customer and employee journeys.

Customer Support—Leveraging Microvideo

While some might argue that video-based customer support is not new, for most customer support websites and call centers, support using live video or how-to videos is still lacking. MicroVideo is about learning, and using small clips of how-to videos is a great way to engage employees and customers with instant support.

Customer support is often hampered by applications that don't support video, but that is changing. More providers are adding support videos, and, given the growth, Aragon feels that more of them will need a full enterprise video platform to be able to manage the growing volume of videos over the next five years.

Video Applications as a Strategic Imperative

The growing need for video for employees and for customers means that video content has become a catalyst for better experiences. Due to different forms of functionality Aragon feels that it may not be just one enterprise video provider that wins the enterprise. Different business units often have different needs.

Regardless, the ability to store the video for user access and the ability to index video for faster access are important criteria. Besides meetings, the need to deliver video content—whether it is new content, recordings from townhalls, or events—means that content also needs to be managed. Video content management via a portal interface is a strategic imperative.

The growth of organically-generated video content, along with the volume of meetings, has made it very hard to find an old meeting using the current repositories from videoconferencing providers. Enterprises need to make video content management a priority and make it part of their vendor selection process.

It isn't just about storage. It is about enabling search via AI/computer vision, and about the quality of the user interface and the ability to transcode videos for delivery to different devices at different levels of quality.

For a summary of overall capabilities by provider, see Table 1.

Vendor	Video Content Creation/ Editing	Portal/ Video Content Mgmt.	Analytics	Internal Townhalls	External Events	Video Meeting Archiving	eCDN	Market place
Brightcove	✓	✓	✓	✓	✓	✓	✓	✓
Haivision	✓	✓	✓	✓			✓	
IBM		✓	✓	✓	✓	✓	✓	✓
Kaltura	✓	✓	✓	✓	✓	✓	✓	✓
MediaPlatform	✓	✓	✓	✓	✓	✓	✓	
Microsoft	✓	✓	✓	✓	✓	Teams Only	✓	✓
movingimage	✓	✓	✓	✓	✓	✓	✓	
Panopto	✓	✓	✓	✓	✓	✓	✓	✓
Qumu	✓	✓	✓	✓	✓	✓	✓	✓
Sonic Foundry	✓	✓	✓	✓	✓	✓	Partner	
uStudio	✓	✓	✓	✓	✓		✓	
Vbrick	✓	✓	✓	✓	✓	✓	✓	
Vidyard	✓	✓	✓			✓	Partner	
Vimeo	✓	✓	✓	✓	✓	✓	✓	✓

Table 1: Summary of enterprise video provider capabilities.

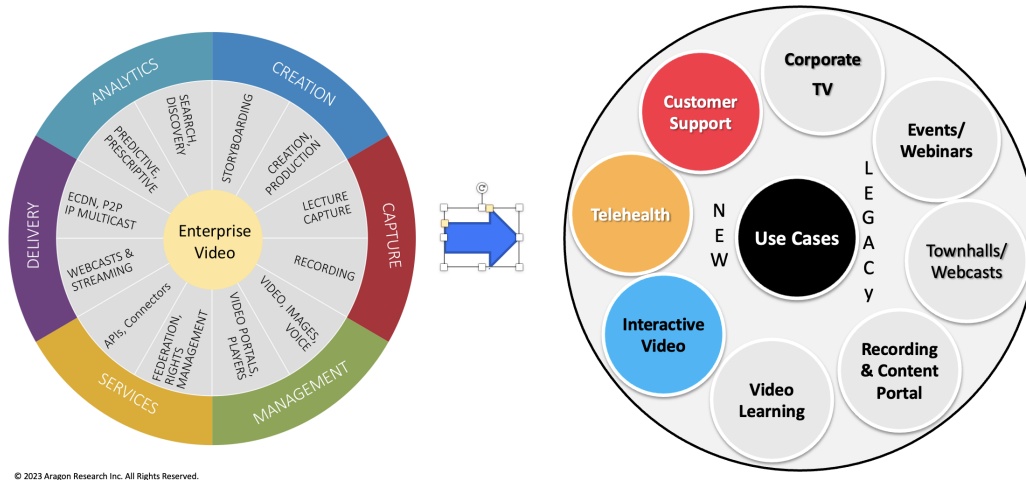


Figure 3: The use cases for enterprise video keep growing.

Today, global enterprises find their teams expanding to include co-workers in many other organizations, geographies, and time zones. The new worker must be much more collaborative across groups, distances, and affiliations—and this is made possible through visual collaboration. See Figure 3 above to visualize the variety of use cases this collaboration entails.

Getting Started with Enterprise Video—Driving Transformation with Better Experiences

There is now a growing need to transform experiences for employees and customers, and video is helping to do that. As discussed in this research note, the need to share video content with employees and with customers is helping enterprises transform and get to faster outcomes. The new use cases that did not exist just a few years ago are also making a difference.

Video content management—the ability to capture, store, manage, and then deliver content at scale—is the core capability that enables these new applications. Live video experiences are also key, but the ability to deliver part of that recording in the form of MicroVideo will help to increase engagement. Because of more advanced indexing enabled by computer vision, users can find the video content they need faster and easier than in the past.

For enterprises, a key exercise is to prioritize the video use cases that will have the biggest impact. The next step is to make a vendor selection. With the TikTok generation alive and well, video consumption in the enterprise is growing fast. Advanced analytics will be key to these growing use cases, as behaviors will change faster due to the rapid knowledge acquisition enabled by video.

The Aragon Research Globe™ for Enterprise Video, 2023 (As of March 30, 2023)



Figure 4: The Aragon Research Globe™ for Enterprise Video, 2023.

Leaders

Brightcove

Brightcove has made significant progress on its strategic priorities with innovation investments that have broadened its solution and services offerings while still proving its scale and reliability is a differentiator. The company has continued to focus on the enterprise by focusing both on its core platform and the use cases that are driving customer demand. The company is advancing streaming and video-first experiences for internal communications, and enablement of commerce businesses to attract and engage buyers with video spanning all its digital properties from e-commerce storefronts to social media.

Enterprises should choose Brightcove for the robust end-to-end capabilities of video ingest, management, playout across multiple channels and devices, and superior analytics. Brightcove excels at enabling larger enterprise customers to scale as its use of streaming matures and grows with more content, destinations, diverse audiences, and use cases employing video—spanning marketing and internal communications. With its flexible platform, Brightcove enables users to extend the use of video across the mar-tech stack with its native capabilities and integrations for Marketing Automation Platforms (MAPs), social media, analytics, e-commerce, and more. Role-based access allows teams in marketing, education, community-building, customer outreach, and corporate communications to more easily access video assets bringing a greater ROI on a company's content investment.

The Brightcove portfolio includes Brightcove Marketing Studio, Brightcove Communications Studio, and enterprise solutions for marketing and communications use cases spanning live streaming, interactive experiences, and content monetization, as well as the Brightcove Marketplace providing numerous integrations that complement and extend the Brightcove platform.

Brightcove Communications Studio enables live and on-demand streaming for a variety of internal communications-based use cases spanning the employee journey, such as team onboarding, protected internal communications portals with video-first experiences, employee engagement via townhalls, and support for numerous other internal and external video communications and training activities driven by video and enhanced with Brightcove's interactive capabilities to further activate audiences. Given all the use cases, Brightcove is well-positioned to capture the growing demand for enterprise video.

Strengths

- Scalability
- Video Marketing Platform
- Video analytics
- Social video management
- Live broadcast
- Breadth of integrations to e-commerce, analytics platforms, DAMs, CMS, and MAPs available
- OTT flexibility
- Premium video experiences across all endpoints

Challenges

- Balancing demand between enterprise and OTT use cases

Kaltura

Kaltura, based in New York and Tel Aviv and led by co-founder and CEO Ron Yekutiel, has continued to focus on its enterprise video platform, as well as a growing focus on Events and Webinars. The Kaltura product offerings include a video portal, virtual events, town halls, webinars, and meetings. It also offers a cloud TV platform, and in education, it offers both a virtual classroom, LMS video integration, and lecture capture. Kaltura continues to partner with eCDN services as well as offer a native eCDN.

Kaltura applications are based on its real-time events/webinar engine and its full video content management platform. It also offers engagement and content analytics that provides viewership, content performance, creation, quality of service, and usage. In November 2022, Kaltura announced new capabilities for Kaltura Webinar, including enhancements to landing pages, analytics, and recording access using the same URL and engagement tools (Polls, Announcements, and Group Chat).

Kaltura also enables enterprises to build their own video experiences or integrate them into existing applications using the Kaltura APIs. Kaltura leverages partners that are part of its marketplace for AI capabilities. Kaltura has a technology marketplace with 170 partner integrations. Kaltura continues its relationship with Amazon AWS, and it expanded its OEM partnership with Oracle. It is also building another instance of its Video Experience Cloud on OCI.

Strengths

- Scalability and flexibility
- Native support for live, real-time, and on-demand video
- Virtual Events, Meetings, Virtual Classrooms, Webinars, Townhalls
- Video Platform as a Service
- Cloud TV focus
- “Enterprise YouTube”-like video portal and mobile application
- Interactive video capabilities—video paths, quizzes
- Advanced analytics

Challenges

- Balancing enterprise and OTT focus

Panopto

Panopto added new CEO Jason Beem in November 2022 and its first CTO Amit Mondal in January 2023 as it continues to focus on its enterprise video platform. The Panopto strategy is to grow organically and via acquisition, as evidenced by its 2021 acquisition of Ensemble Video and its recent overtures to buy out competitors. Panopto's video management system offers video portals, video search, a content management system (CMS), meeting recording, live virtual events, and analytics.

Panopto Capture is a browser-based video recorder that allows users to easily record their screens, application windows, browser tabs, cameras, and slides without installing software. Its mobile capture and intuitive browser-based editing position the firm well for the growing demand for MicroVideo. Panopto also makes it easy to find recorded video content via its advanced search. Also, Panopto has continued to enhance its virtual event capabilities for CEO townhalls, sales kickoffs, and other types of corporate communication. In addition, it has spent the past year focusing on improving integrations with leading UCC applications and enhancing AI-related functionality.

Panopto provides unique integration capabilities with Microsoft Teams, which allows the use of Panopto functions inside Teams, and adds search for Panopto videos within Office 365 applications. Panopto also offers meeting recording integrations with BlueJeans, Cisco, LogMeIn, Pexip, and Zoom. Panopto expanded its automatic AI-powered transcription for presenters in 21 languages by adding no-added-cost machine translation for those same languages, which is ideal for multi-language organizations, regions, and global deployments. Its platform is also a strong choice in corporate learning with integrations for Cornerstone, Camtasia, Salesforce, and Slack, as well as comprehensive accessibility support.

Strengths

- Corporate communications and training use cases
- Ease of use
- Good analytics capabilities
- Video search
- Meeting recording options
- LMS integration
- On-premises or hosted deployment options

Challenges

- Awareness outside of North America

Qumu

Qumu announced that it was acquired by Toronto-based Enghouse in January 2022. Enghouse also acquired Vidyo, so it now has two brands under its corporate umbrella. Qumu's enterprise video platform offers live streaming at scale, asynchronous video capture, storage, and comprehensive management and analytics of live video and video on demand (VOD). It has the extensibility to scale video broadcasts, supporting live streaming to over 100,000 viewers while also recording and creating video on demand (VOD) assets.

In November 2022, Qumu announced the launch of Qumu Live, its managed service that combines live streaming along with professional services to ensure that events can be managed without a hitch. Qumu added automatic live and on-demand captions, in addition to transcriptions, to its offering. Qumu also integrated with Socialive to elevate the look and feel of live events.

Qumu's Pathfinder offering, an intelligent content distribution engine, enables cloud customers to utilize its software and hardware endpoints within the customer's network, enabling edge-based, peer-to-peer, and hybrid delivery.

Qumu continues to partner with AT&T, BT, and other major providers of video solutions. It is also listed in the Google Cloud and Zoom marketplaces.

Strengths

- Trusted enterprise-grade security
- Asynchronous content delivery and management
- Enterprise cloud, hybrid, as well as on-premise capabilities
- Open architecture for extensibility
- Professional video editing
- Live and async video analytics (user, content, and network)
- Brand awareness
- Professional services
- Adaptive delivery using edge-based CDN, hybrid, P2P, and multicast
- Video conferencing to streaming framework for self-service live webcasting at scale

Challenges

- Diversifying and growing channel partners

uStudio

uStudio, led by Founder and CEO Jen Grogono, pioneered the focus on media and podcasting, which has seen growing demand in enterprises for use cases such as corporate townhalls and sales enablement. The uStudio Enterprise Media Platform offers both enterprise video and podcasts. uStudio focuses on sales enablement, learning, internal communications, and audio and video streaming. uStudio supports audio and video podcasting and video-on-demand as well as live video and audio streaming. To help enterprises, uStudio offers a guided coaching service, which helps enterprises develop, plan, and execute a podcast service.

uStudio's podcast platform lets enterprises organize and deliver corporate audio and video content in a modern, mobile-first, and Netflix-style UX—helping to reach increasingly remote and hard-to-engage employees more naturally than the corporate intranet. One of the unique capabilities of uStudio is its customizable white-label mobile app, which can be customized with numerous channels, shows, episodes, and targeted listener playlists, making it ideal for several use cases. uStudio's native HTML5 interactive player and player framework allows for nearly infinite customizations, including the ability to wrap any open third-party player.

In 2022, uStudio launched its MicroVideo service that allows existing videos to be shortened without the need to run the new file through a transcoder. This will allow enterprises to leverage existing video content for marketing, learning, and employee experience.

In May 2022, uStudio announced the integration of uStudio with Microsoft 365, including Teams, SharePoint, and Search. The integration allows Teams users to search and discover uStudio media content. uStudio has continued to grow due to its focus on both employee and customer engagement. Its focus on MicroVideo is something others should emulate.

Strengths

- Scalability
- Podcasting for voice and video
- Deliver video anywhere
- Video and podcast analytics
- Customizable video platform and mobile application
- uStudio for Salesforce integration

Challenges

- Awareness outside of the U.S.

Vbrick

Vbrick is based in Herndon, Virginia, and is led by Chairman and CEO Paul Sparta. Vbrick offers its flagship Rev Enterprise Video Platform that it sells directly and through channel partners. The Vbrick Enterprise Video Platform (EVP) offers video capture, enrichment, and production, video content management, live video streaming, distribution, reporting and AI-based analytics, and video conferencing integration. Vbrick Rev IQ is its computer vision offering that enables facial recognition, live transcription, translation, and an enhanced viewing experience called Pulse. In 2020, Vbrick added advanced analytics that provide enhanced interactive search and visibility on who appears in a video and when.

In October 2022, Vbrick announced a new offering called Producer that enables enterprises to do web browser-based capture, high-quality production and distribute those videos through its eCDN. The native Rev video editing abilities help to streamline the post-production of live event recordings. Vbrick also can enable embedded webcasts, so live and recorded events can be leveraged inside of a corporate intranet or through virtually any web application (internal or external).

In December 2022, Vbrick acquired eCDN provider Ramp for an undisclosed price. With its existing eCDN capabilities that are native to Rev, and now with Ramp's open, universal eCDN, Vbrick has more ways to offer fully scalable video distribution on a global basis.

Vbrick has continued its global distribution relationship with Cisco. Additionally, in 2022, Vbrick announced new partner relationships with AWS, Pexip, and ServiceNow. Vbrick integrates with Microsoft Teams, Webex, Pexip, and Zoom to enable large-scale meetings while also offering meeting archiving and management of recordings. Vbrick also offers enhanced integration with Microsoft Teams, making it easier for Teams users to access video content stored in Rev.

Vbrick continues to be one of the few enterprise video providers to be FedRAMP-certified, and this will help to meet the growing demand for video in government organizations. Vbrick's growth is due to its focus on pervasive video use cases, including live streaming and webcasts, video-on-demand streaming, video content management, and video enhancement via transcription and computer vision. By augmenting its overall enterprise video platform with embedded eCDN capabilities, Vbrick is well-positioned to continue its growth in both commercial and government enterprises.

Strengths

- Scalability
- AI features
- Extensible across a wide variety of providers
- First-party eCDN capabilities
- Cloud and on-premises options
- Highly secure video delivery
- Partnerships and integration with Microsoft and Cisco
- Integrations with Zoom, Pexip, and ServiceNow

Challenges

- Awareness outside of U.S.

Vimeo

Vimeo, based in New York and led by CEO Anjali Sud, has increasingly positioned itself as a provider of B2B and enterprise video services after successfully building out its consumer video streaming platform. Vimeo continues to advance Vimeo Enterprise as its flagship B2B enterprise video product.

Vimeo has continued to grow its business with a growing focus on use cases, including employee communications, interactive video, and video marketing for creative professionals. The industries include Retail, Software & Tech, Healthcare & Pharma, and Financial Services. The firm also offers a growing number of native Vimeo Apps, including offerings for iOS, Android, MacOS, Magisto, Shopify, and Zoom.

Vimeo's enterprise offerings emphasize large-scale livestreaming with flexible pricing, its suite of monetization features, which include analytics and live pay-per-view, concurrent streams, live automated closed-captioning, real-time data on stream health, and the overall configurability of its solutions. Its Vimeo Enterprise platform for internal communications supports collaboration features such as near-instantaneous live event creation, video chapter markers, and a video content management interface that promotes working together in a secure SSO-controlled environment, native webcam and screen recording also integrated with popular productivity tools (e.g., Asana), transcript creation and global search, and cloud-based video editing tools.

Vimeo's dedicated offering for virtual events enables 4K streaming as well as a suite of lead generation tools and tools for targeting event attendees. Its event capabilities include robust engagement tools, like moderated Q&A, chat, auto-captions, and the ability to bring your brand front and center with customizable elements.

Strengths

- Scalable streaming options
- Video content management
- Brand personalization
- OTT monetization
- Robust event support

Challenges

- Market awareness outside of U.S.

Contenders

Haivision

Haivision, headquartered in Montreal and Chicago and led by Chairman and CEO Miroslav Wicha, focuses on mission-critical, real-time video networking and visual collaboration solutions. Following its acquisition of CineMassive in August 2021, Haivision's offerings now include video wall technology that enables defense, public safety, government agencies, and enterprise organizations to visualize and dynamically respond to urgent situations fast.

In July 2022, Haivision launched Haivision Command 360, its next-generation critical visual collaboration platform for operation and command centers. Command 360 enables teams to make real-time decisions by centralizing all video, data, communication, and visualization sources into a fully secure video wall solution that can span multiple sites.

With its video wall platform, Haivision continues to deliver a global common operating picture for customers, which is critical for enterprise, defense, and government organizations with global security operations centers, joint and tactical operations centers, public safety operations centers, and control rooms.

Haivision also provides video solutions for broadcast workflows, and in 2022, the company acquired Aviwest extending its portfolio of broadcast video contribution solutions to 5G and mobile contribution solutions like Haivision Pro, Haivision Air, Haivision Rack, and Haivision Streamhub.

Haivision continues to promote and support the adoption of the SRT open-source video streaming protocol with its leadership of the SRT Alliance. The newest members include YouTube, Paramount, Cloudflare, Dolby.io, Chyron, JW Player, THEO Technologies, and EVS.

For reliable delivery of live 4K video and a growing set of video applications, Haivision remains one of the providers to watch in enterprise video.

Strengths

- Live streaming scalability
- 4K video support
- Security
- Premise/hybrid/cloud options
- Cloud integration with Microsoft Azure and Amazon AWS
- Only vendor to support visual collaboration with video wall technology
- CDN and eCDN capabilities for video delivery

Challenges

- Channel education/awareness

IBM

IBM, based in Armonk, New York, and led by CEO Arvind Krishna, continues to offer IBM Watson Media as its flagship Enterprise Video Platform. The three main offerings are IBM Enterprise Video Streaming and IBM Video Streaming, and IBM Enterprise Content Delivery Network. IBM has been a pioneer in building out its computer vision story for Watson Media.

IBM now offers AI-based video search that can leverage keyword tagging as well as the ability to jump to specific scenes based on AI insights. The IBM Watson Media capabilities for video are some of the most advanced and include video assembly, usage, and search/discovery (i.e., scene finder, automated speech-to-text, and captioning). IBM continues to add new features, recently including emojis.

In April 2022, it approved that Microsoft Teams Meetings can be live-streamed to IBM's Video Streaming Server. Besides Microsoft, IBM also has integrations with Cisco Webex and a partnership with AT&T FlexWare with IBM ECDN.

IBM's streaming offerings are particularly effective for supporting virtual events and enabling a shift to remote work. IBM now focuses on several use cases for live broadcast corporate communications, marketing, media and entertainment, and OTT. Specifically, the media and entertainment market is an IBM stronghold, and some of the largest entertainment brands in the world count on IBM.

IBM can solve workplace management issues with its Maximo Worker Insights offering that works with CCTV systems to provide intelligent insights about occupational health. For enterprises that want a complete video streaming platform with built-in eCDN, IBM is one to watch.

Strengths

- Live streaming
- Advanced video analytics
- OTT use case
- Media and entertainment
- Security
- Video search
- Support for virtual events

Challenges

- Market awareness

Microsoft

Microsoft offers Microsoft Stream (on SharePoint), its flagship video platform, as part of the Microsoft 365 suite. Stream works in concert with Microsoft Teams, its Unified Communications and Collaboration offering that includes video meetings, calling, team chat, video messages, and meeting recordings.

Stream (on SharePoint) is deeply integrated with the apps and services in Microsoft 365 and is the successor service to the original version of Stream. As part of Stream's new architecture, video files are stored in SharePoint and have the same rights, governance, and compliance capabilities options as other file types stored in SharePoint.

Stream offers an array of capabilities, including recording, uploading, video search, sharing, a full-featured mobile app, integration with many Microsoft 365 apps, and enhanced playback that includes transcripts, search, closed captions, analytics, chapters, timeline markers, and more.

Microsoft Viva Engage is a new community platform in Microsoft 365 and Microsoft Viva that leverages communities and conversations to connect people across the company—wherever and whenever they work—so that everyone is included and engaged. Viva Engage helps organizations build community, spark engagement with leadership, harness knowledge, and build personal networks. It includes a MicroVideo service powered by Stream, which lets users share media and video with others. This represents a solid move by Microsoft into the MicroVideo space, and we expect it to capitalize on the growing demand for user-generated video content.

On top of the enhancements to Stream, Microsoft is adding Copilot capabilities across Microsoft 365, including Viva Engage, Microsoft Teams, and Office applications. Aragon expects to see Copilot capabilities for Microsoft Stream in the near future. Microsoft has a solid roadmap to make video a first-class citizen within Microsoft 365 product offerings.

Strengths

- Video quality
- Software delivery
- Video analytics
- UC connectors
- Good APIs for integration

Challenges

- Ease of giving external users access

movingimage

Movingimage, led by CEO Ingo Hofacker, continues to focus on EV and is one of the key European providers of EV. It offers the EV Platform VM Pro, CorporateTube, Webcasting, and Virtual Events. CorporateTube offers video content management and recording, playback, and webcast for live events.

The key AI capabilities that movingimage offers include facial recognition, voice analytics, scene detection, and image recognition. movingimage offers integrations with web content management, learning management, and digital asset management (DAM) providers.

Some of the key use cases movingimage supports include live streaming, recruiting videos, and branding videos. In May 2022, movingimage partnered with NPAW to enhance the overall video available to customers. movingimage continues to partner with Microsoft Azure for cloud infrastructure. Movingimage focuses on industries, including pharma/life sciences, automotive, finance, telecommunications, and media & entertainment. movingimage offers over fifty third-party video plugins that leverage its Rest API.

Strengths

- Enterprise video platform with a strong API
- Security and access control (full GDPR-compliance)
- eCDN capabilities
- APIs
- Webcast and “Enterprise YouTube”-like video portals

Challenges

- Awareness in North America

Sonic Foundry

Sonic Foundry continues to focus on enterprise video and has expanded its market focus under the leadership of CEO Joe Mozden Jr. In December 2022, Sonic Foundry announced that it had raised \$9.7 million, including \$8.5 million in debt financing to expand into new and adjacent markets. Its EV offerings now include Mediasite, Vidable™, and Video Solutions.

Mediasite supports the entire video workflow, from integrated content creation/capture to management and delivery of interactive video. Mediasite continues to offer its advanced content integration with Zoom. With the integration, users can automate the publishing of recorded classes or meetings. Users can find recordings faster by leveraging Mediasite's search indexing, data enrichment, and security.

Vidable is a new offering that will provide a complete collection of AI solutions for enterprise video. Vidable has several AI capabilities developed and more launching in 2023.

Video Solutions provides comprehensive video services to enterprise and events customers, including event capture, streaming, distribution, and integration services. In January 2023, Sonic Foundry announced a partnership between CTI Meeting Technology and Video Solutions to provide comprehensive event content solutions for event organizations.

In addition, Sonic Foundry launched Global Learning Exchange™ (GLX) in 2022. GLX provides students in emerging countries access to aggregated online content from leading universities.

Strengths

- Lecture capture
- Video analytics
- Video publishing
- Ease of use
- Secure video portal
- Integrations

Challenges

- Leveraging its strengths in higher education in the corporate market

Innovators

MediaPlatform

MediaPlatform continues to focus on its enterprise video platform with an increasing focus on internal and external events. MediaPlatform offerings include webcasting, virtual events, video delivery, video content management, and analytics. Products include MediaPlatform Broadcaster, Autocaster, Video Business Intelligence, Event Success Dashboard, On Demand, Edge, and Smartpath.

MediaPlatform Broadcaster, its flagship webcasting platform, is geared toward supporting virtual events in a post-pandemic world. Its offering features an intuitive interface that makes it easy to manage large-scale internal townhalls and virtual conferences. MediaPlatform integrates with Google Meet, Cisco Webex, Microsoft Teams, and Zoom into MediaPlatform Broadcaster for high-profile, high production value, and interactive corporate events for hybrid workforces.

In 2022, MediaPlatform rolled out 42 new Broadcaster features and developed an automated webcasting platform—Autocaster—that allows enterprise video teams to pre-produce, schedule, and monitor events that autoplay without engaging producers or control studio equipment.

It also announced a Microsoft eCDN professional services competency and native support for the peering tech in Broadcaster. The company continued to focus on innovation, dedicating 65% of its spending to engineering, and reported top-line growth and low churn for the year.

Strengths

- Continued investment in innovation
- Business broadcasting capabilities
- Web conferencing integrations
- Web and video conferencing gateway
- Video analytics, including sentiment analysis
- Event management and archiving

Challenges

- Awareness outside of North America

Vidyard

Vidyard, based in Kitchener, Ontario, Canada, and led by CEO Michael Litt, announced that former Google Executive Jonathan Lister has joined as COO. Vidyard continues to offer its EV Platform with a key focus on Sales, Marketing, and SRP Communications. Vidyard offers a full enterprise video platform that is specifically focused on communications for sales and marketing use cases.

Vidyard enables enterprises to create dynamic video personalization, interactive video, and 1-to-1 video messaging, as well as automated transcriptions of videos. To understand customer journeys in real-time, Vidyard offers individual viewer tracking analytics, as well as integrations with marketing automation providers such as HubSpot, Marketo, and others. It continues to offer Sales Feed, which is a digital media network to provide sellers with sales tips, news, online shows, and podcasts.

In May 2022, Vidyard enhanced its Video Messaging for Sales teams, including new analytics. Vidyard also announced an integration with Gong for conversational intelligence, video call to action, video chaptering featuring a team performance dashboard, and updated interfaces with Salesforce Sales Cloud.

Vidyard capabilities that help with collaboration include the ability to highlight, comment, and draw on the screen during a video call. Vidyard has attractive pricing that includes both free and professional plans to make it easier for individuals or teams to get started with video hosting and sharing.

Strengths

- Sales and marketing use cases
- Ease of purchasing
- Analytics
- Video personalization
- Video ROI reporting
- Integrations with marketing and sales platforms

Challenges

- Market awareness outside of North America

Aragon Advisory

- Enterprises need to evaluate and prioritize video use cases that can impact both employee and customer experiences.
- Aragon expects the use of user generated MicroVideo content to grow and enterprises should look to leverage this growing form of tacit knowledge sharing.
- Use this Aragon Research Globe™ for Enterprise Video as a guide to create a short list of vendors to evaluate.
- Intelligent video, powered by computer vision is here. Enterprises should ask providers for roadmaps for computer vision, with particular focus on object and scene detection.

Bottom Line

Video usage continues to grow in the enterprise and with customers. New use cases and easier ways to share video are helping to increase demand. While traditional use cases should be leveraged, so should consideration of how to leverage new use cases. Video continues to be highly sought after by employees and by customers. Enterprises should find more ways to leverage this content type as it is one of the keys to business transformation going forward.

Aragon Research Globe Overview

The Aragon Research Globe graphically represents our analysis of a specific market and its component vendors. We do a rigorous analysis of each vendor, using three dimensions that enable comparative evaluation of the participants in a given market.

The Aragon Research Globe looks beyond size and market share, which often dominate this type of analysis, and instead uses those as comparative factors in evaluating providers' product-oriented capabilities. Positioning in the Globe will reflect how complete a provider's future strategy is relative to their performance in fulfilling that strategy in the market.

A further differentiating factor is the global market reach of each vendor. This allows all vendors with similar strategy and performance to be compared, regardless of their size and market share. It will improve recognition of providers with a comprehensive strategy and strong performance, but limited or targeted global penetration, which will be compared more directly to others with similar perspectives.

Dimensions of Analysis

The following parameters are tracked in this analysis:

Strategy reflects the degree to which a vendor has the market understanding and strategic intent that are at the forefront of market direction. That includes providing the capabilities that customers want in the current offering and recognizing where the market is headed. The strategy evaluation includes:

- Product
- Product strategy
- Market understanding and how well product roadmaps reflect that understanding
- Marketing
- Management team, including time in the job and understanding of the market

Performance represents a vendor's effectiveness in executing its defined strategy. This includes selling and supporting the defined product offering or service. The performance evaluation includes:

- **Awareness:** Market awareness of the firm and its product.
- **Customer Experience:** Feedback on the product, installs, upgrades, and overall satisfaction.
- **Viability:** Financial viability of the provider as measured by financial statements.
- **Pricing and Packaging:** Is the offering priced and packaged competitively?

- **Product:** The mix of features tied to the frequency and quality of releases and updates.
- **R&D:** Investment in research and development as evidenced by overall architecture.

Reach is a measure of the global capability that a vendor can deliver. Reach can have one of three values: *national*, *international*, or *global*. Being able to offer products and services in one of the following three regions is the third dimension of the Globe analysis:

- **Americas** (North America and Latin America)
- **EMEA** (Europe, Middle East, and Africa)
- **APAC** (Asia Pacific: including but not limited to Australia, China, India, Japan, Korea, Russia, Singapore, etc.)

The market reach evaluation includes:

- Sales and support offices worldwide
- Time zone and location of support centers
- Support for languages
- References in respective hemispheres
- Data center locations

The Four Sectors of the Globe

The Globe is segmented into four sectors, representing high and low in both the strategy and performance dimensions. When the analysis is complete, each vendor will be in one of four groups: *leaders*, *contenders*, *innovators*, or *specialists*. We define these as follows:

- **Leaders** have comprehensive strategies that align with industry direction and market demand and effectively perform against those strategies.
- **Contenders** have strong performance, but more limited or less complete strategies. Their performance positions them well to challenge for leadership by expanding their strategic focus.
- **Innovators** have strong strategic understanding and objectives but have yet to perform effectively across all elements of that strategy.
- **Specialists** fulfill their strategy well but have a narrower or more targeted emphasis with regard to overall industry and user expectations. Specialists may excel in a certain market or vertical application.

Inclusion Criteria

The Aragon Research Globe for Enterprise Video, 2023 will help clients differentiate the many vendors that offer enterprises the tools to manage and deliver all forms of video and rich interactive content.

The inclusion criteria for this Aragon Research Globe are:

- **Revenue:** A minimum of U.S. \$5 million in primary revenue for video content management or a minimum of U.S. \$9 million in revenue in a related market (collaboration, content management, web, and video conferencing).
- **Shipping product:** product must be announced and available.
- **Customer references:** vendor must provide at least three customer references in each region where it does business.

Aragon Research evaluates markets and the major technology providers that participate in those markets. Aragon makes the determination for including vendors in our Aragon Research Globes with or without their participation in the Aragon Research Globe process.

Non-participation by technology providers in the Aragon Research Globe process does not affect their inclusion in this research note. The inclusion criteria listed in this research note is the determining factor.