



The Aragon Research Globe™ for Enterprise Video, 2024

Intelligent Video Experiences Are Here

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



SUMMARY

Aragon Research releases its 10th Aragon Research Globe™ for Enterprise Video. It examines 13 providers in a market where video demand by users and customers is causing enterprises to reexamine their approach to visual experiences.

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Introduction

Video continues to be one of the most popular ways to engage with others and consume video content. Video consumption continues to grow in demand—and enterprises are on the hunt to find new ways to leverage video for both employee and customer experiences. Generative AI and Computer vision represent new ways to make finding videos easier and faster.

A key point is that Visual Experience is becoming a new battle cry. Enterprises are seeing the demand for video from their associates and customers, but often, due to legacy infrastructure, making the enterprise fully video-enabled remains a challenge. With consumer consumption surging due to platforms such as Instagram and TikTok, Microvideo has emerged as a new use case. This Aragon Research Globe evaluates 13 providers who are making a difference in enterprise video.

Enterprise video providers today face the dilemma of serving existing customers with existing use cases while at the same time innovating to be able to offer care 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.

While 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. Use cases continue to emerge in the delivery of video experiences as well as in managing and understanding video assets—that can be reused over and over again. Aragon feels that the Enterprise video market is in transition. Intelligent video is here.

Intelligent Video and the Use of AI for Chapters and Summaries

Intelligent Enterprise Video solutions must offer comprehensive video content management that is powered by AI. They should allow users to leverage video across and within workflows not limited to the video repository.

One of the new trends is the ability to create video summaries and also chapters of longer-form recordings. That has even gotten easier to do with the use of Generative AI and the associated computer vision algorithms.

The issue in the past has been the hassle of finding the video in question and then editing it to make clips. Now, with newer tools, the idea of making clips—has become much more automated.

Generative AI and the Rise of Intelligent Video Assistants

With the advent of generative AI, it will be hard to ignore the need to leverage this technology when it comes to enterprise video. The biggest change will be conversational search so that users can find the video they're looking for quickly and easily.

However, what we see emerging is an intelligent video assistant that will not only help users with transcribing and summarizing video sessions but will also help people use video more effectively.

One of the reasons for the massive surge in demand for TikTok and 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.

Putting Intelligence into Video for Better Employee and Customer Experiences

Users, both employees and customers, want more video—and YouTube Shorts and TikTok are evidence of that. While consumer usage continues to grow in the double digits, there is more demand in the enterprise, and marketing, learning, and shopping are at the top of the list.

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 2025, 50% of enterprises will have deployed their own versions of MicroVideo (60% probability).*

Conversational Search Will Power More Video Usage

One of the biggest changes coming to Enterprise Video will be the rise of Conversational Search powered by Generative AI. The challenge for people who consume video is finding the videos they are looking for, and with a conversational interface—finding videos or the part of a video that is needed—will revolutionize search and, in turn, create

more demand for access to video.

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. Google has already enabled scene-based search on YouTube. We expect conversational search to take this to the next level.

Prediction: *By YE 2025, 50% of Enterprise Video Providers will offer a Conversational Search interface to speed up the overall function of video search (70% probability).*

Low Code Video Editing—the New Normal

Due to all of the consumer digital creators—video editing is on the move. However, it has been slow to shift over to the enterprise. The great news is that so many Enterprise Video providers have added low-code video editing to their platform offering.

Clipping and shortening a long video is often what these tools are great for. Basically, this means 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, Vbrick, and Vimeo.

Aragon sees low code editing as a must-have feature these days. Enterprises should ask existing providers what their plans are for a low code editor.

Video Increases the Pace of Learning

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.

Video Content Management and Conversational Search

One of the keys to having a video strategy starts with being able to manage video at scale. As demand for both produced video content and user-generated video content grows, video content management is now more important than ever before.

The change we expect to see is a Conversational Interface that allows for easier and faster search. Since this is already a feature for consumers (e.g. Apple TV Search), it is only a matter of time before this becomes an offering.

Managing Internal and External Content—Making the Case for a Video Platform

There is video showing up all over the enterprise. Accessing video content demands more than just storing the video in a file-sharing system or cloud repository.

Given that workers are so busy the need to access recorded video is just as important as attending a live event. More than 50% of the views of an event happen after the event. So, here, too, having a video platform becomes even more critical. EV providers are meeting this need by providing easy access to recorded townhalls and meetings.

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.

In many cases, vendor selection may hinge on internal vs external use cases. There are several key capabilities that enterprises should evaluate carefully when looking at enterprise video providers (see Note 1).

Note 1: Intelligent Enterprise Video Platform Architecture

1. Capture/Recording, Editing and Publishing

- Ability to capture, tag, and edit a video recording
- Low code video editing
- 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

Key Use Cases for Enterprise Video

Leveraging Video for Customer Experience (Pre-Sale and Post-Sale)

Marketers realize they must leverage more video and interactive experiences in the pre-sale buyer experience. The good news is that there are marketing offerings that provide full video experiences have EV offerings front and center—providing robust and embedded capabilities.

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).*

Customer Support—Leveraging Microvideo

For Post Sale- the race is on to offer more how-to videos—and that is part of the reason that YouTube Shorts has exploded. However, the opportunity for EV Providers is to offer a secure video experience—due to the proprietary nature of some of the training videos.

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 Learning—Training and Microvideo

In both academic learning and hands-on training—video remains as a key way to deliver training both live and recorded. Lessons and courses can now be made even more interactive and sections will be much easier to find for reference given generative AI based Intelligent Assistants.

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 and Webinars—Video Makes a Difference

Hybrid events are becoming more of the norm and the ability to do both at scale is a challenge for providers. There is definitely a collision course for events with EV providers and Video conferencing providers and we expect to see continued consolidation.

A number of EV providers have expanded their townhall feature sets to add a more robust external events capability. 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. Here too the townhall (internal) use case is different than the event—since Events have external users. This does make a difference and the use case volume may impact the vendor selection.

Lecture Capture—Ready for Transformation

As long as live teaching exists, Lecture capture will remain a thing. The key market for lecture capture is higher education, both undergraduate as well as continuing education. While there is a trend to broadcast classes at some universities, others still rely on lecture capture.

Over time, Aragon feels that many universities and colleges will just opt to use Video Conferencing and EV tools to record the class.

With Intelligent Assistants powered by Generative AI, Aragon feels that lecture capture use case could be transformed. With automatic summaries and the opportunity for scene-based search, the value of a captured session becomes much more valuable.

Video Podcasting Is Not to Be Overlooked

Video podcasting has become a must have approach for large sales organizations. 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.

Additionally, video-enabled live broadcasts can also be repurposed as a Podcast by making the longer version shorter. Overtime, Video AI will be able to take a long broadcast and automatically shorten it. Not all vendors are focused on Podcasting, but for uStudio, it has been powering their growth.

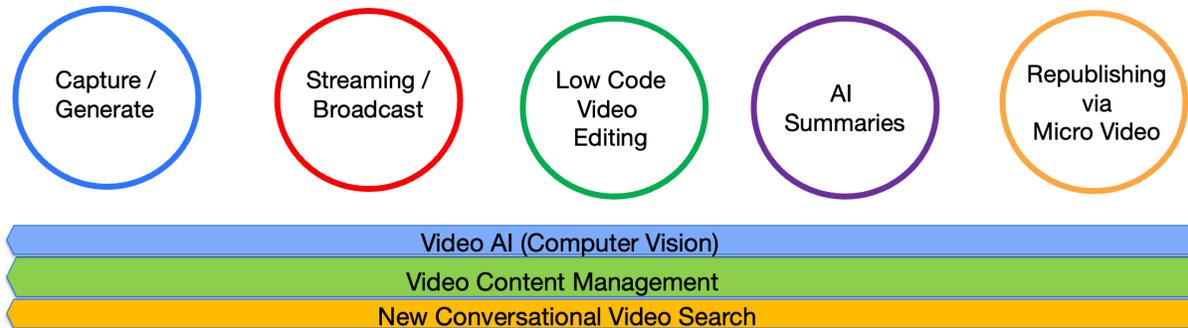


Figure 2: Enterprise video architectures are changing, and so are video-led customer and employee journeys.

Visual Use Cases as a Strategic Imperative

The growing need for video for employees and 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.

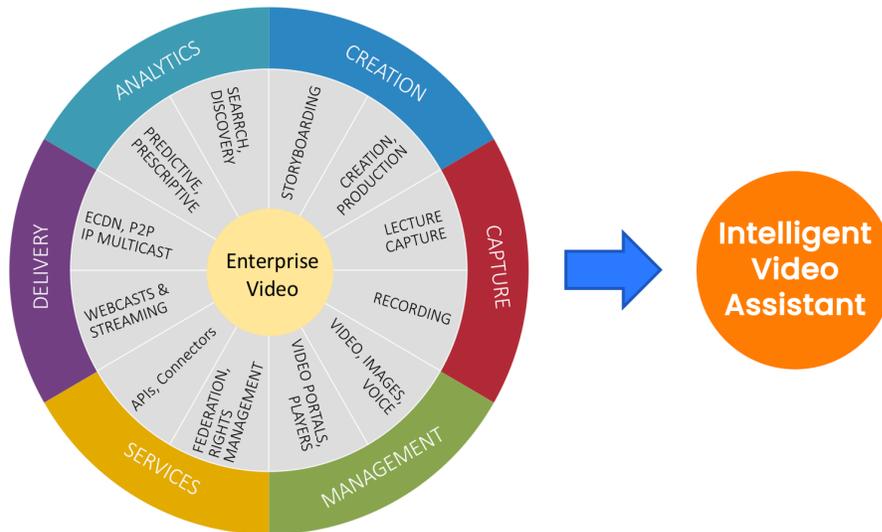


Figure 3: Aragon expects that many providers will add an Intelligent Video Assistant in the next two years.

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, which portrays the rise of Intelligent Video Assistants.

Getting Started with Enterprise Video—Focus on the Customer and the Employee

The race is on to leverage video—and now it is becoming easier than ever before. The benefit of doing this for employees and 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 Intelligence has arrived and it will leverage live and recorded video. 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 can help drive customer engagement as well as employee experiences. The next step is to make a vendor selection. Vendors that offer the use cases that meet your needs—and who are investing in AI—should be evaluated.

The Aragon Research Globe™ for Enterprise Video, 2024

(As of May 2, 2024)

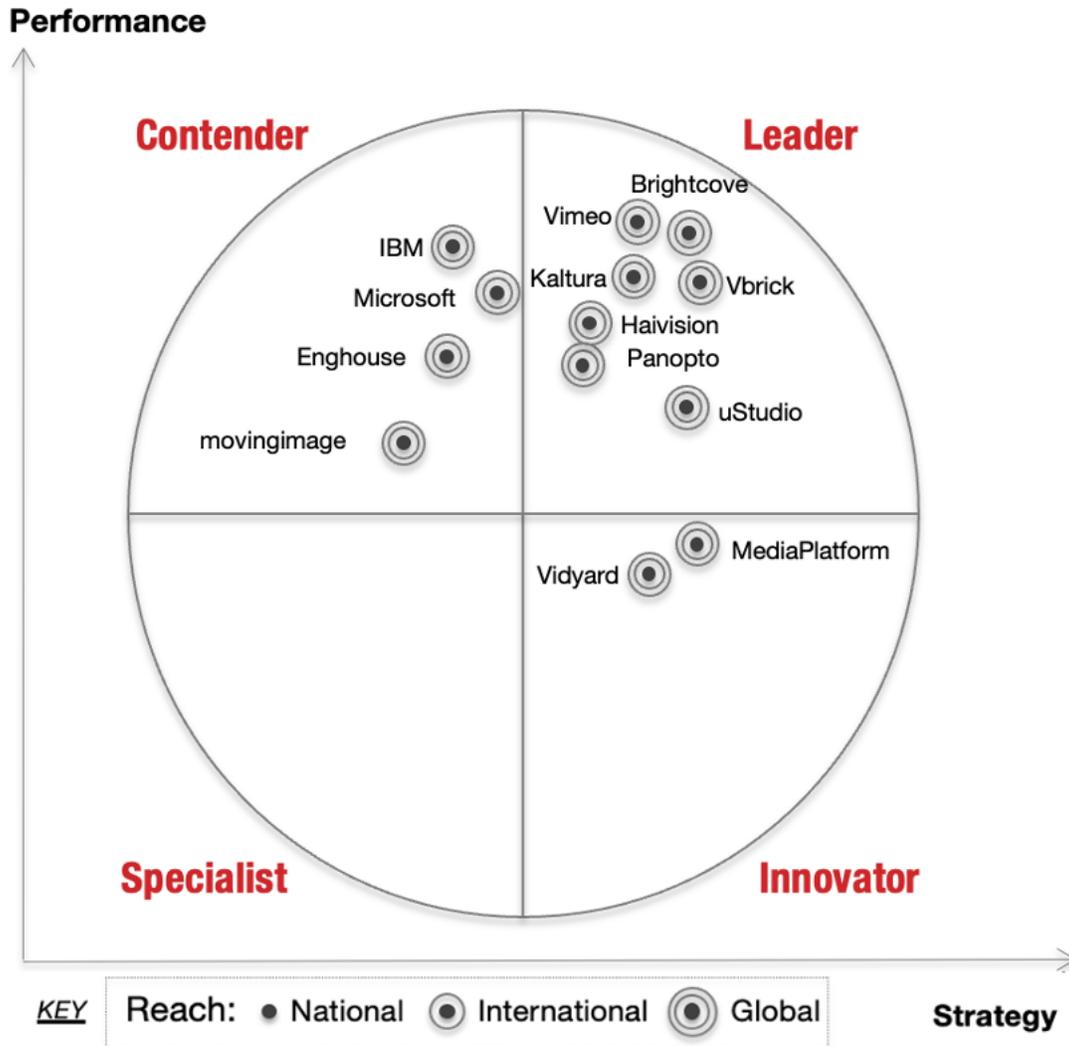


Figure 4: The Aragon Research Globe™ for Enterprise Video, 2024.

Leaders

Brightcove

Brightcove, based in Boston and led by CEO Marc DeBevoise, continues to focus on Enterprise Video with a growing focus on multiple use cases. In December 2023, Brightcove announced three seasoned executives—Kathy Klinger as CMO, Jim Norton as CRO, and David Beck as COO. The company is advancing streaming and video-first experiences for internal and external 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. The company has a diverse customer base representing a broad range of industry sectors as well as an extensive network of service providers and solution integrators that make it suitable for a wide variety of enterprises. In particular, Brightcove is strong in healthcare, pharmaceutical, financial services, technology, manufacturing, retail, and e-commerce.

Brightcove differentiates with enterprise video portals and experiences that are mobile-responsive. The company continues to accelerate its product innovations, offering a portfolio that includes Brightcove Marketing Studio, Brightcove Communications Studio, and enterprise solutions, with use cases that span live streaming, interactive experiences, and content monetization. Brightcove Communications Studio enables live and on-demand streaming for a variety of internal communications initiatives throughout the employee journey.

Brightcove's differentiated features include a web-based video editor that makes it faster and easier for users of all abilities to create, manage, and publish micro, or snackable, video for a variety of marketing and communications use cases. The company also released Publisher Insights, a new enhancement to its Audience Insights product, which provides real-time analytics to help organizations quickly identify content that drives viewer interest and shape more effective audience engagement strategies.

Brightcove continues to rapidly expand its integrations into the martech ecosystem, with new releases like Sprinklr and others for advertising, content management systems (CMSs), marketing automation platforms (MAPs), social media platforms, analytics, e-commerce, and more. Addressing the needs of teams in marketing, education, community-building, customer outreach, and corporate communications, Brightcove continues to enhance its role-based permissions to securely enable more access to the platform, giving users the ability to curate extensive video libraries and to leverage tools that provide greater control and boost ROI on the company's video content investments.

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

Haivision

Haivision, led by Chairman and CEO Miroslav Wicha, focuses on mission-critical, real-time video networking and visual collaboration solutions. The Haivision offerings include low latency video encoding and mobile video transmission solutions that ensure broadcasters can contribute live video from anywhere over any network (including internet, satellite, 4G, and 5G) into their production workflows.

Haivision continues to promote the adoption of its Emmy Award-winning SRT open-source video streaming protocol (which it originally developed) and in September 2023 it announced that NVIDIA had joined the SRT Alliance.

The company also provides video wall solutions for operation and command centers for the enterprise, government, defense, and public safety markets. The Haivision video wall solution, powered by Haivision Command 360, is designed to empower security and network operation centers in industries where rapid decision-making and situational awareness are vital.

In the enterprise space, Haivision customers include large corporations, security operations at banking and financial institutions, big technology companies like Akamai, and transport and utility companies like Maersk. Haivision Command 360 integrates seamlessly into these centers, offering real-time visibility of multiple content sources, interactive content control, and dynamic content layouts, which are all crucial for efficient response in complex enterprise operations.

Haivision continues to grow due to its diverse industry focus and cutting-edge video innovations that serve the Broadcast, Enterprise, Government and Defense, and Public Safety markets.

Strengths

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

Challenges

- Channel education/awareness

Kaltura

Kaltura, led by co-founder and CEO Ron Yekutieli, announced that John Doherty was joining Kaltura as CFO. Kaltura offers a robust set of use cases via its enterprise video platform and its events and webinar offerings. 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 leverage its real-time events/webinar engine and its full video content management platform. It also offers real-time and VOD engagement and content analytics that provide viewership, content performance, creation, quality of service, and usage. Kaltura also enables enterprises to build their own video experiences or integrate them into existing applications using the Kaltura APIs.

Kaltura Webinars and Events features include ease of sign-up, landing pages, promotional tools, analytics, and recording access using the same URL and engagement tools (Polls, Announcements, crowd reactions, and Group Chat). Kaltura has developed native AI capabilities, including an AI data-based assistant, ASR, notifications, agenda and quizzes generator, chat mood analyzer, and more. It is also investing in additional AI capabilities as part of its roadmap. Kaltura also leverages partners that are part of its marketplace for additional AI capabilities. Kaltura has a technology marketplace with 170 partner integrations. Kaltura offers a growing product family of video offerings that can meet the needs of enterprises and broadcasters.

In July 2023, Kaltura announced enhancements to its Cloud TV and Streaming offering, including the ability to offer more innovative experiences and analytics that allow adjustments to be made based on viewer behavior. It also announced the Shop in Shop add on, which allows video providers to manage their content within the operators shop and control the user experience.

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, based in Seattle and led by CEO Jason Beem, continues to focus on its enterprise video platform with a focus on learning. 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. In April 2023, Panopto announced a Partnership with NewTek to leverage its CaptureCast hardware solutions for lecture capture. It also announced that it had certified Pearl-mini, Pearl-2, and Pearl nano lecture capture devices from Epiphan.

For recorded and on-demand video, Panopto also makes it easy to find video content via its advanced search. 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.

Also, Panopto has continued to enhance its virtual event capabilities for CEO townhalls, sales kickoffs, and other types of corporate communication. The Panopto 14.16 release features faster syncing with its growing number of Learning Management Systems that it integrates with. Besides Higher Education, Panopto is expanding its industry focus to include Aviation, Energy and Utilities, Healthcare, Manufacturing, and Telecommunications.

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. With its focus on Video Learning in multiple industries, Panopto is a good choice for both long and short form video.

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

uStudio

uStudio, based in Austin and led by Founder and CEO Jen Grogono, has grown due to its focus on media and podcasting with a focus on business use cases. The uStudio Enterprise Media Platform offers both enterprise video and podcasts. The demand for Microvideo is growing, and uStudio launched its Microvideo service two years ago. It 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.

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. 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.

Regarding the uStudio mobile app, it is fully customizable, which means brands can white-label it and customize it 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.

uStudio integrates 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. With its focus on use cases and Microvideo, uStudio is one to watch. With Microvideo and its customizable Mobile App, uStudio lets brands stand out and this is helping its growth.

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, led by Chairman and CEO Paul Sparta, continues to innovate its enterprise video platform with a growing focus on AI. The Vbrick Enterprise Video Platform (EVP) offers video capture, enrichment, production, AI-driven video content management, live video streaming, distribution, reporting and analytics, and video conferencing integration. Vbrick also offers a universal eCDN. Having combined the existing eCDN capabilities native to its EVP with the open eCDN acquired from Ramp, Vbrick has more ways to offer fully scalable video distribution on a global basis.

In January 2024, Vbrick announced its new AI features that complement its existing AI capabilities. Powered by generative AI, users can ask an assistant questions about video content, generate summaries, tags, and titles with the click of a button, automatically flag sensitive content for review, and deliver personalized video recommendations. It also has a new Smart Search feature that makes finding the right scene in a video fast and easy. Vbrick's AI also enables user tagging, transcription, and translation to improve accessibility and help users pinpoint specific information or speakers.

Vbrick offers video creation and editing within its platform. Producer enables enterprises to create high-quality production broadcasts using only a browser, which can then be distributed through its eCDN. Native video editing abilities help to streamline the post-production of live event recordings. Vbrick can also enable embedded webcasts, so live and recorded events can be leveraged inside of a corporate intranet or through virtually any web application or workflow (internal or external).

In January 2024, Vbrick announced it had been certified in the ServiceNow store. Through its integration, customers can embed videos in ServiceNow pages and portals, and using Vbrick's AI-based search, videos can be intelligently delivered on demand to ServiceNow users. Vbrick has continued its global distribution relationship with Cisco. Additionally, Vbrick also has partner relationships with AWS, Pexip, and ServiceNow. Vbrick integrates with Microsoft Teams, Webex, Pexip, and Zoom to enable large-scale broadcasts while also offering meeting archiving and management of recordings.

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. With its investment in AI and its growing industry and partner focus, Vbrick is well-positioned for the future.

Strengths

- Scalability
- Growing AI capabilities
- Extensible across a wide variety of providers
- First-party eCDN capabilities
- Cloud and private cloud 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, led by interim CEO Adam Gross, continues to focus on growing its position in the enterprise video market—given its success in consumer market. Vimeo now offers, video content management and hosting, events and webinars, video collaboration for projects, continues to advance Vimeo Enterprise as its flagship B2B enterprise video product.

In February 2024, Vimeo announced Vimeo Central—its new fully searchable AI-powered Video Hub. Vimeo Central has AI powered video summarization, Capture, Events, Video Library, and new Analytics capabilities. With its new AI summarization, Vimeo is putting others on notice.

Vimeo emphasizes large-scale livestreaming at the best resolutions, including 4k and 8k. 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.

The Vimeo Enterprise platform for internal communications supports collaboration features such as near-instantaneous live event creation, video chapter markers, and a video content management. The Vimeo suite of monetization features includes 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.

Vimeo offers a growing set of native Vimeo Apps, including offerings for iOS, Android, MacOS, Magisto, Shopify, and Zoom. Vimeo has continued to 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.

Strengths

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

Challenges

- Market awareness outside of U.S.

Contenders

IBM

IBM, led by CEO Arvind Krishna, continues to offer IBM Enterprise Video Streaming as its flagship Enterprise Video Platform. IBM helped pioneer AI video and has been leveraging AI capabilities such as AI-generated highlights for over four years. The IBM Enterprise Video Streaming 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.

IBM's AI video capabilities include AI-based video search including scene detection and the ability to jump to specific scenes based on AI insights. The IBM Enterprise Video Streaming platform includes options for both public facing streams as well as private events with added security and the IBM Enterprise Content Delivery Network. The Pricing plans include Silver, Gold, and Platinum editions.

IBM now offers a branded Portal experience. This allows for high levels of personalization and is on display with events such as the Masters Golf Tournament. IBM Enterprise Video Streaming use cases include 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 enables Microsoft Teams Meetings, which can be live-streamed to IBM's Video Streaming Server. In addition to Microsoft, IBM has integrations with Cisco Webex and a partnership with AT&T FlexWare with IBM ECDN. IBM can solve workplace management issues with its Maximo Worker Insights offering, which works with CCTV systems to provide intelligent insights about occupational health. For enterprises that need high levels of broadcast capabilities in a turnkey, personalized experience offering, IBM is one to watch.

Strengths

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

Challenges

- Market awareness

Microsoft

Microsoft, based in Redmond, Washington, offers Microsoft Stream, its flagship video platform, as part of Microsoft 365. Stream works in concert with Microsoft Teams, its Unified Communications and Collaboration offering that includes video meetings, webinars, live events, calling, team chat, video messages, and meeting recordings. Stream is ideal for internal video use cases.

In April 2024, Microsoft launched Microsoft Copilot in Stream. Copilot in Stream can summarize videos, answer questions about long-form videos, identify key points in a video where a topic is discussed, and identify action items that are discussed in a meeting.

Stream offers an array of capabilities, including recording, uploading, video search, sharing, integration, and inline playback with many Microsoft 365 apps, and enhanced playback that includes transcripts, translations, search, closed captions, analytics, chapters, timeline markers, comments, reactions, and more.

In 2021, Microsoft acquired Clipchamp, an in-browser video creation and editing solution. In the summer of 2023, Microsoft launched Clipchamp for [Work](#), with a rich library of filters, styles, transitions, and stock media, annotations, and brand kit. It's built directly into Microsoft 365 on top of OneDrive and SharePoint, allowing import from and export to Microsoft 365. In addition, it offers AI capabilities like text to speech for synthetic voice overs, silence and filler word removal, and closed caption generation. Microsoft includes Clipchamp in Microsoft 365 Enterprise and Business licenses. Non-Microsoft customers can purchase Clipchamp as a standalone product.

With Stream and now with Clipchamp and Copilot, Microsoft has a solid roadmap to make video a first-class citizen within Microsoft 365 product offerings.

Strengths

- Video quality
- Copilot for Stream
- New video editing offering
- Software delivery
- Video analytics
- UC connectors
- Good APIs for integration
- Fully integrated to M365

Challenges

- Ease of giving external users access

movingimage

Movingimage, based in Berlin and led by CEO Ingo Hofacker, continues to focus on Enterprise Video and it continues to be one of the key European providers. 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. movingimage offers over fifty third-party video plugins that leverage its Rest API.

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. New capabilities in 2023 included simplified attendee management and real-time questions and answers (Q&A). In 2024, Movingimage introduced a new video player that includes multi-language support and subtitles.

Key use cases movingimage supports include live streaming, recruiting videos, and branding videos. movingimage continues to partner with Microsoft Azure for cloud infrastructure. Movingimage focuses on industries, including pharma/life sciences, automotive, finance, telecommunications, and media & entertainment.

Strengths

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

Challenges

- Awareness in North America

Enghouse

Enghouse, based in Toronto and led by Stephen Sadler, has quietly been acquiring Enterprise video providers over the last several years. Besides Vidyo. It now owns Qumu, which it acquired in January 2022. In January 2024, it also acquired Mediasite from Sonic Foundry. Enghouse now offers a full portfolio of Enterprise video, Video Conferencing, and UC offerings.

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. Qumu Live, its managed service that combines live streaming along with professional services to ensure that events can be managed without a hitch.

Enghouse 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.

With a growing number of video offerings, Enghouse is well-positioned to meet the needs of a variety of enterprises.

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)
- Video conferencing to streaming framework for self-service live webcasting at scale

Challenges

- Balancing and maintaining a growing number of video products and services

Innovators

MediaPlatform

MediaPlatform, based in Los Angeles and led by CEO Mike Newman, offers its enterprise video platform with a focus on both live and recorded events. MediaPlatform product 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. With premium quality and highly customizable experiences among its key battle cries, MediaPlatform markets its offering as giving extensive creative control to media professionals in Global 2000 companies.

MediaPlatform has started down the road to AI, offering AI-powered transcription, translation and a new Sentiment tracking feature in Broadcaster. Sentiment tracker is part of its analytics offering that includes its Event Success Dashboard that includes live monitoring and Quality of Service (QoS) tracking.

Media Platform Autocaster allows enterprise video teams to pre-produce, schedule, and monitor events that autoplay without engaging producers or control studio equipment. MediaPlatform integrates with Google Meet, Cisco Webex, Microsoft Teams, and Zoom into MediaPlatform Broadcaster for high-profile, high production value, and interactive corporate events. With a focus on premium, one-to-many events and integration with Video Conferencing providers, MediaPlatform is one to watch.

Strengths

- Continued investment in innovation
- Ease of use
- Analytics
- 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 a new \$15M investment led by Export Canada with participation from BMO Capital Partners. This brings total investment to \$90.7M. Vidyard continues to offer its EV Platform with a key focus on Sales, Marketing, and SRP Communications.

Vidyard enables enterprises to create dynamic video personalization, interactive video, and 1-to-1 video messaging, as well as automated transcriptions of videos. They also offer highly personalized analytics to understand viewing behaviors. Vidyard capabilities that help with collaboration include the ability to highlight, comment, and draw on the screen during a video call.

In October 2023, Vidyard announced a new Generative AI-based Sales Assistant that will help Sales professionals compose emails designed to engage prospects and customers. It will also allow marketers to speed up the creation of personalized videos for sales and marketing purposes.

In April 2024, Vidyard announced the availability of AI-based Avatars that can be used in conjunction with videos—particularly for salespeople that may not want to use their real video likeness.

Vidyard integrates with marketing automation providers such as HubSpot, Marketo, Salesforce, and others. With a growing focus on AI and sales and marketing use cases, Vidyard is well-positioned for the future.

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

- The Enterprise Video market is in transition. Not all providers will offer Intelligent Video Assistants.
- With the advent of Intelligent Micro Video—often called short-form video—demand for video consumption in the enterprise will go up.
- Use this Aragon Research Globe™ for Enterprise Video as a guide to create a short list of vendors to evaluate.

Bottom Line

As video use cases continue to grow in the enterprise, demand for video continues to expand rapidly. With Micro Video, the opportunity to leverage longer forms of video and clip them into shorter, more digestible moments is a trend. Enterprises will continue to be challenged by employees and customers to offer more video content. Enterprises that do generally experience higher net promoter scores both internally and externally.

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.

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- **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, 2024 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.

Exclusions

Sonic Foundry—Sonic Foundry sold its Mediasite business to Enghouse.