



KALTURA

Video and Learning at Work

The State of Video in the Enterprise 2019

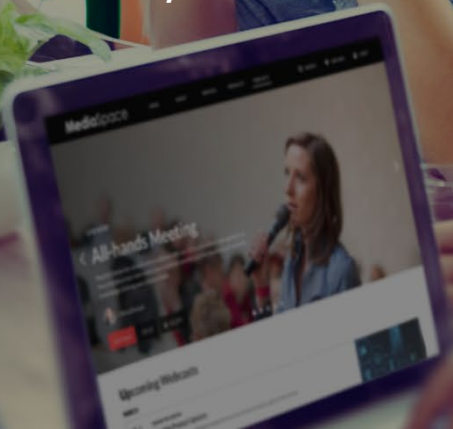


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About This Report

In our sixth annual “State of Video in the Enterprise” report, Kaltura surveyed professionals from across the United States. This panel was drawn from a random sample of full-time employees of companies with more than 500 employees, via Survey Monkey Audience. More than 1200 individuals participated in this year’s survey.



Video is used throughout the enterprise for a wide variety of use cases, including corporate communications, internal executive messaging, internal and external training, collaboration, marketing, and sales.

This year, we chose to focus on video and its role in learning in the enterprise. With entire teams and technological systems devoted to internal training, learning has a huge impact on the digital culture of a company. It’s worth examining how video plays into these teams and systems today. While learning and development professionals have been leveraging video as part of training for some time, emerging technologies and changing attitudes towards video in the consumer market are also changing the role of video for learning and development.

In this survey, we explore:

- How employers and employees are using video for learning
- Whether these methods are working and what employees would find more effective
- How enterprises are using video today in general
- What holds employees back from learning from one another

Executive Summary

Despite preferring video as a way to learn in the workplace, employees admit not giving it their full attention. Using advanced video techniques like interactivity can help recapture lost engagement that can plague less dynamic video.

Video usage continues to increase in the enterprise. While many employees have tried creating work-related videos for themselves, many employers still do not empower their employees to create the videos that could help spread knowledge across the organization.

- **The majority of employers use video for learning and development.**

91% of respondents report that their company is using at least some video for training or learning and development. **90%** of employees have used video to learn a specific skill.

- **Employees prefer learning from video.**

The majority, **69%**, would prefer to learn a new skill from video as opposed to a written document.

- **But video still does not keep employees' full attention.**

72% of employees admit that they do not give training videos their full attention.

- **Interactivity and virtual classrooms offer two popular ways to recapture attention.**

82% say interactive videos hold their attention better than traditional videos. **64%** report their employers are using virtual classrooms for live learning via video.

- **Video use is increasing, but many organizations still do not empower employees to create their own videos.**

88% see video use as steady or growing at their organization. But **only half** have access to basic video creation tools, and **one third** have no access to video creation tools of any kind.

Introduction



Introduction: Video Is Today's Classroom

It's obvious that today's employers rely on video for training. **91% of employees have used video for training or for learning and development** at their current place of employment.

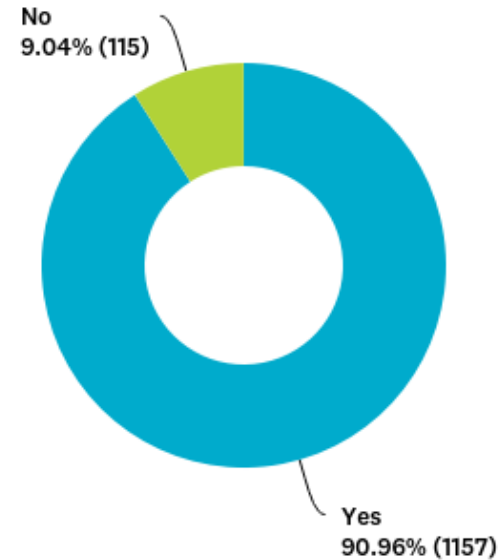
91% of employees have been trained via video

Why? It's engaging, it's scalable, it's sustainable. Video-based training in general can be considered a mature technology at this point.

But does that mean that there's no room for improvement? A successful learning and development program requires more than throwing up a couple of videos on the intranet. Today's video can include interactivity, live broadcasts from the classroom, and more. Let's explore what is and isn't working, and discover some of the emerging trends in learning video.

Almost all employers using video to train employees

Do you or have you used video for training or learning and development at your current place of employment?



Video Learning Today



Learning Specific Skills Via Video

One of the more commonly thought of uses for video training is for the mandatory training that most employees must undergo, such as for compliance, IT security, and HR topics like harassment. But video can teach more than that.

We asked respondents whether they had recently tried to learn a **specific work-related skill from videos**. This could be part of a formal training program, but it might also something more informal created by a colleague. Some examples might **include professional development videos, new procedures, product demos or tutorials, or quick recordings showing how coworkers perform a task**.

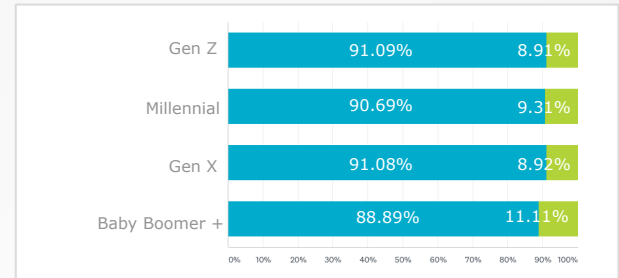
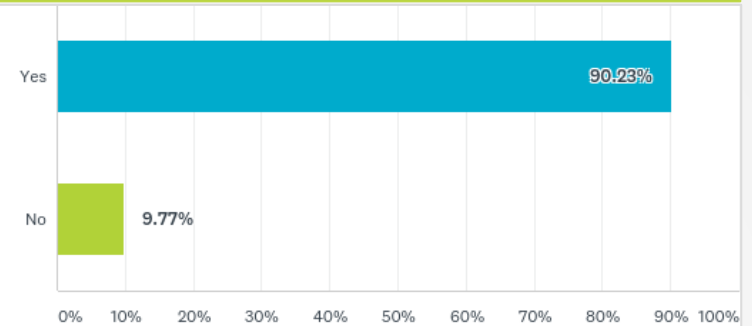
90% watched skill-building videos

Video is a fantastic way to learn new skills, with the visual and auditory elements. Which is probably why **more than 90% of respondents have turned to video to learn new skills at work**.

Gen Z may have been raised on videos, but they're not the only ones taking advantage. **Comparing across generations, rates are nearly identical**, with Boomers only slightly less likely to turn to video to learn a new skill. But remember – now that we've all become accustomed to consumer-grade video from Netflix, Hulu, and their competitors, expectations for enterprise video experiences have risen accordingly.

Video training goes beyond just compliance

In the last year, have you watched a video to learn a work-related skill?



What Learning Methods Do Employees Prefer?

Video is scalable and cost-effective for employers. But how do employees feel about learning from video? What method of learning would they prefer?

31% *A written manual, guide, or wiki*

69% *A short ("micro-learning") video I could watch right when I needed the skill*

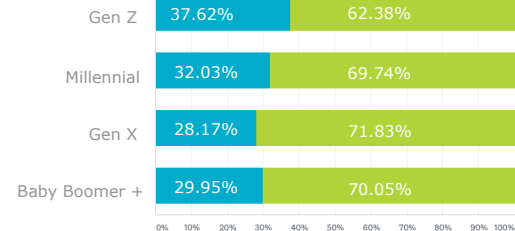
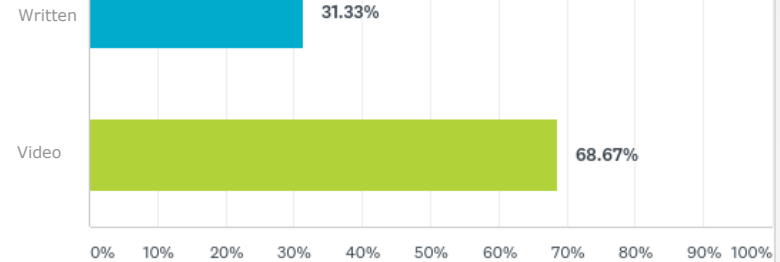
More than two-thirds of employees would actually prefer to learn from videos, across generations. But somewhat surprisingly, Gen Z is actually slightly less interested in video than their elders.

Suggested Action:

Micro-learning videos have become increasingly popular as a way to teach skills, for good reason. Easy to consume, these short videos are available for employees any time and anywhere, whenever they realize they need to learn something or brush up on a skill. Consider investing further in just-in-time learning. It doesn't need to be formal – the emphasis should be on practical skills employees actually need.

The majority of employees prefer learning from video

If you needed to learn something new to do a task for your job, how would you rather learn?



Holding Employees' Attention

With its combination of sight, sound, and motion, video can be far more engaging than text. But unfortunately, that doesn't mean that all videos are created equal, or that employees actually pay attention to the videos they're tasked with watching.

28% *I always pay attention to training videos*

67% *Sometimes I skim through them, watch without sound, or listen while doing something else*

6% *I never actually pay attention to them*

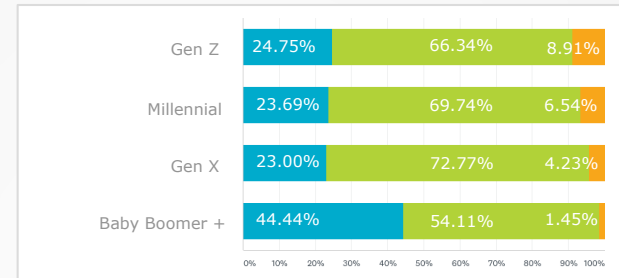
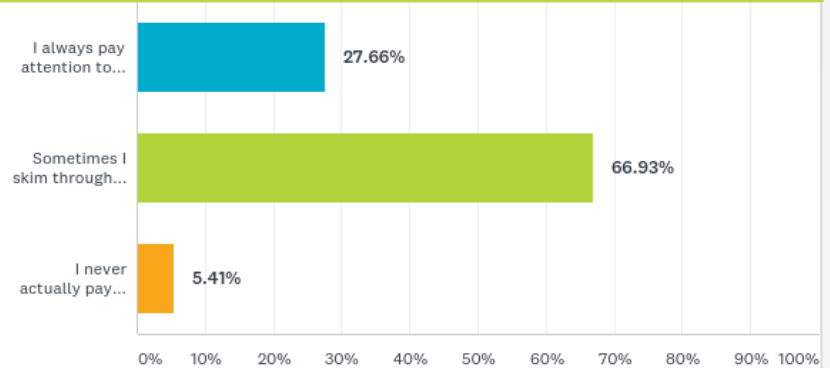
72% of employees admit that they do not give training videos their full attention. That's almost three-quarters!

But do all employees approach this in the same way? After all, much has been said about the special relationship Millennials and Gen Z have with video.

Breaking out the generations, **Gen Z, Millennials, and Gen X show very similar viewing patterns**, with about 23-34% reporting always paying attention. Their elders, though, **Baby Boomers and older, are rather more rule-abiding. 44%** of them report diligently watching their videos, and only **1.45%** say they never pay attention.

Nearly three-quarters of employees don't pay full attention to training videos

Do you ever skim through training videos, or do you always pay attention to training videos?



***Taking the Next Step in
Learning Videos***



Getting Employees' Attention Back with Interactive Video

So if employees are tuning out during training videos, how can employers try to hold their employees' attention better? One emerging technique is through adding interactivity.

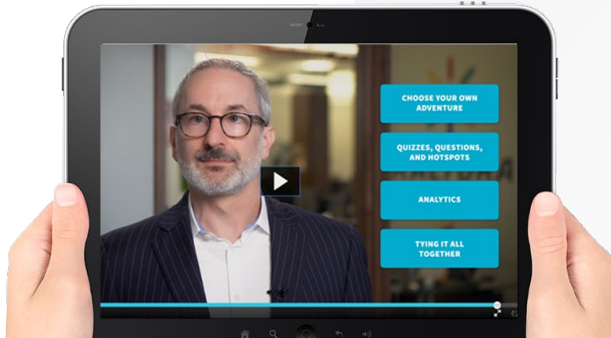
Videos can be made interactive by techniques such as adding hotspots that link to additional materials or videos, embedding quizzes in the video, and even building videos whose content and storyline change depending on the viewer's choices.

82% prefer interactive videos

Building these features in makes a difference – across the board, **employees agree that interactivity holds their interest better than traditional videos.**

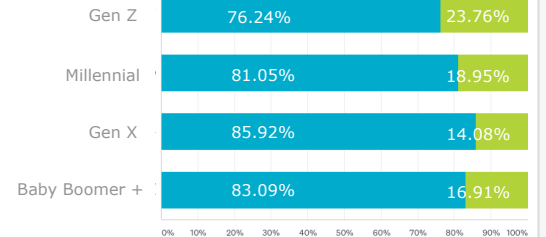
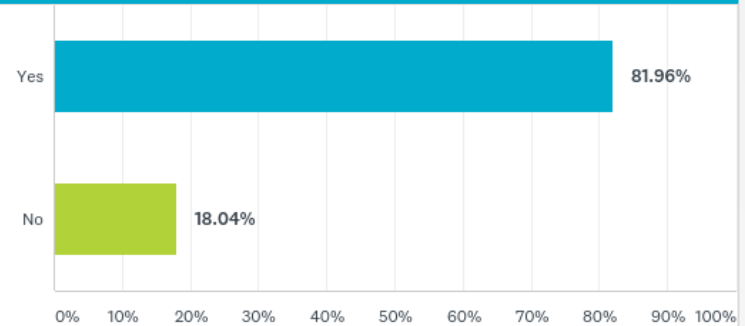
Suggested Action:

Add interactive elements such as hotspots, quizzes, and even branching videos that change based on viewer behavior to capture and hold employees' wandering attention.



Interactive video holds attention better

Do you think interactive videos hold your interest better than traditional videos?



Live Classes Via Video

Another way to get people's attention is through live training, in which trainees can learn in real time and interact with the instructor. However, trying to get everyone physically in a single room can be difficult. That's why many organizations are turning to remote learning or virtual classrooms, in which trainees join a **live class remotely, using video**.

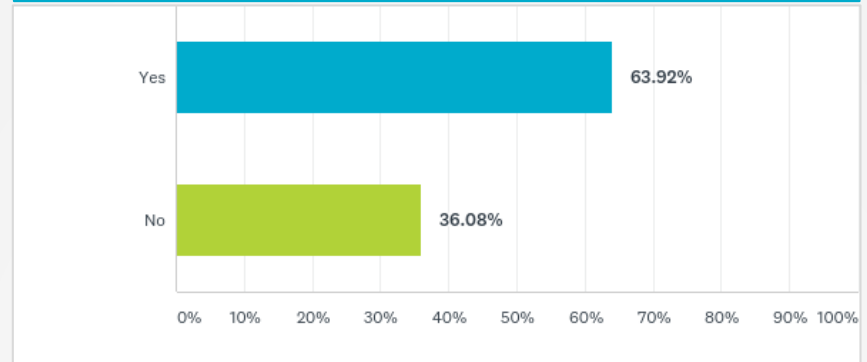
Nearly **two-thirds** of respondents report that their employer is using remote learning or virtual classrooms today. Expect to see more sophisticated virtual classrooms emerging as more employers turn to this way of engaging their learners.

Suggested Action:

Make sure to take full advantage of both the "live" and the "video" parts of this set up. For live learners, it's critical to give viewers ways to interact with the instructor in real-time. But make sure to record the training sessions as well; while there are huge benefits to having the live interactions, VOD is still useful for employees who are unable to join a live class. It's also really helpful for those who did join the live discussion, but want to go back and review material later.

Two-thirds of employers today use virtual classrooms

Does your employer use remote learning or virtual classrooms?



***Employees and Video
Across the Organization***



Video Use Increasing at Majority of Organizations

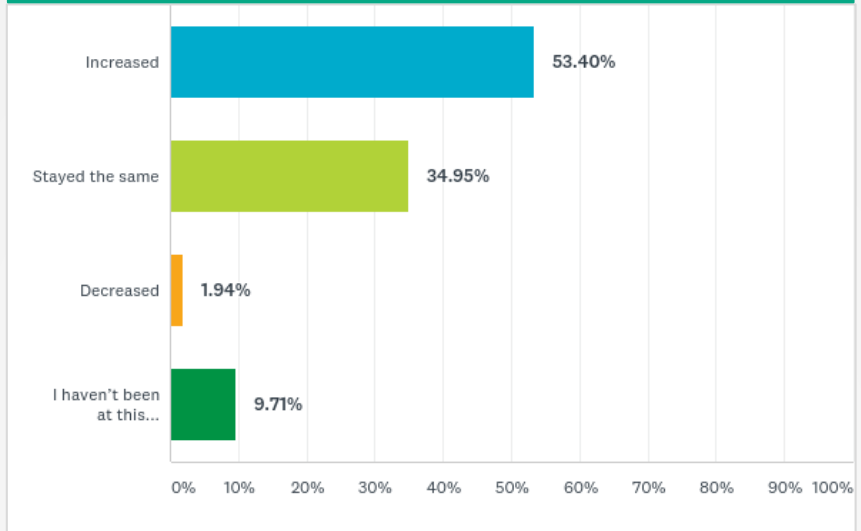
Video is a valuable tool in today's organizations, not just in training but across the entire organization. More than half of respondents see the amount of video at their organization growing. **Not even 2% see it decreasing in the last three years.**

88% see video use as steady or growing



Less than 2% see video use decreasing

Has the amount of video used for any purpose at your organization changed in the last 3 years?



But Different Generations Disagree on Trends

Interestingly, this perception is not consistent across generations. **Older workers are far more likely to see video use as growing.**

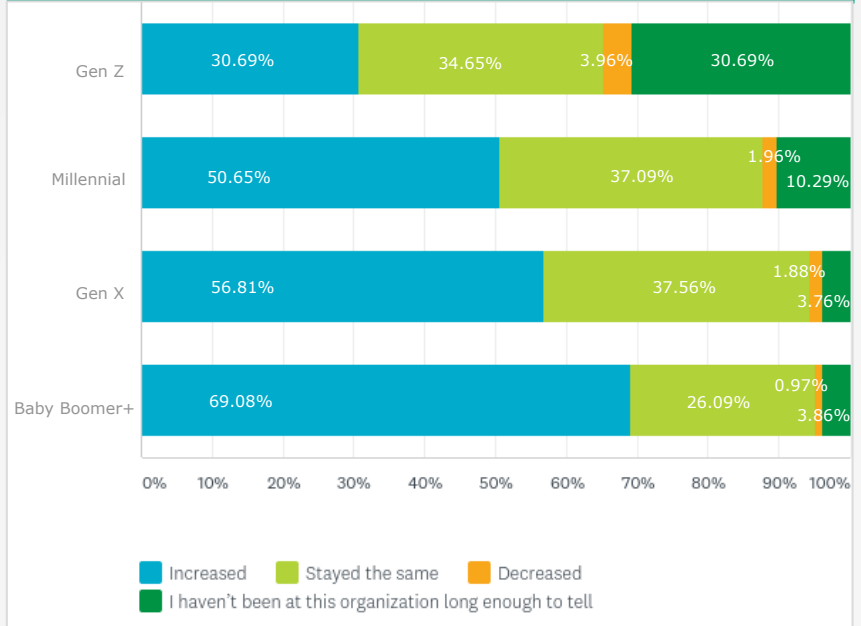
Part of this is most likely because far more younger workers report not having been at their current organization long enough to tell the overall usage pattern. Even younger workers who have been in one place for longer do not have the same long-term experience against which to mark changes.

Some of it may also be that older workers do not perceive video use as the norm, and so changes feel more dramatic to them. Meanwhile, Gen Z has been raised on video and so don't perceive video use in the workplace as increasing in comparison to their use outside of work.



Older workers perceive greater change

Has the amount of video used for any purpose at your organization changed in the last 3 years?



Nearly a Third Have Tried Their Own Hand at Video

Video, especially learning videos, often come from top-down. But today's employees are creating video bottom-up, as well. It's easier than ever for employees to create their own video content for use at work. This might include meeting recordings, screen share recordings, tutorials for colleagues, marketing videos, sales videos, testimonials, video emails, etc.

Nearly a third of employees are already creating videos for work purposes.

Video by Generation – With Some Surprises

When looking at this by generation, some patterns emerge that are both expected, and surprising. **Boomers are least likely to create their own video**, with only 22% having tried, followed by Generation X at 31%.

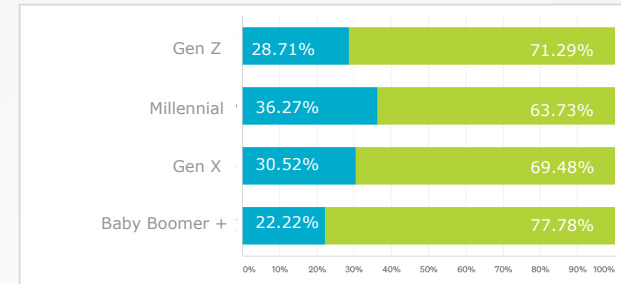
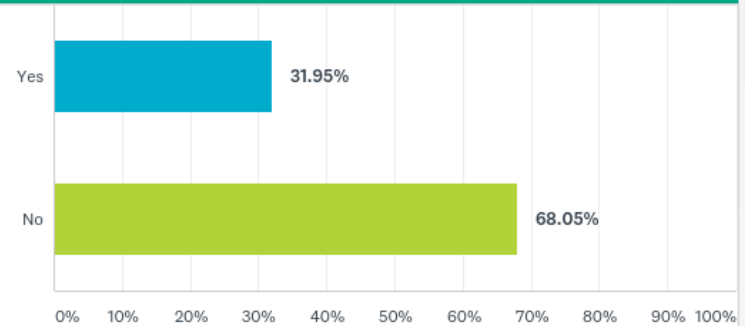
However, **Generation Z are a little behind Gen X!** One might think that a generation that came of age with YouTube, Snapchat, and phone cameras would be a little more likely. However, the key to unraveling this mystery most likely lies in their age. Right now, in 2019, Gen Z are at most 24. They're at the beginning of their careers and the bottom rung of the ladder. Many likely do not yet feel empowered to create work-related video. Instead, the recording of video calls and creation of screen captures is likely being left to those tech-savvy employees a step or two above them in the chain of command – **the Millennials, who hold the title of most likely to record video at over 36%.**

What Happens Next?

As Baby Boomers continue to age out of the workforce and Gen Z gets a little more seniority under their belt, it seems likely that the number of employees creating video on their own will grow.

Many employees take video into their own hands

Have you ever created video content for work use?



Ensuring Workers Have the Tools Necessary for Growth

While a third of workers have tried creating their own videos, many are being held back.

50% have access to basic video creation tools

1/3 have no access to video creation tools of any kind

Barely **half of respondents report that they have access to basic capture tools** such as a webcam or a phone, and a **third lack access to any kind of video tool.**

Unsurprisingly, access to tools that could make more powerful and effective videos is even less widespread. **24% have access to advanced capture tools** like a studio or dedicated cameras. Only **22% have access to any kind of video editing tool.** **22% can add captions** and **17% can add interactive elements.** Hampering the ability to prove ROI, and thus get additional funding for more tools, only **17% have ways to analyze video use** (who watched, for how long, how many times, etc.)

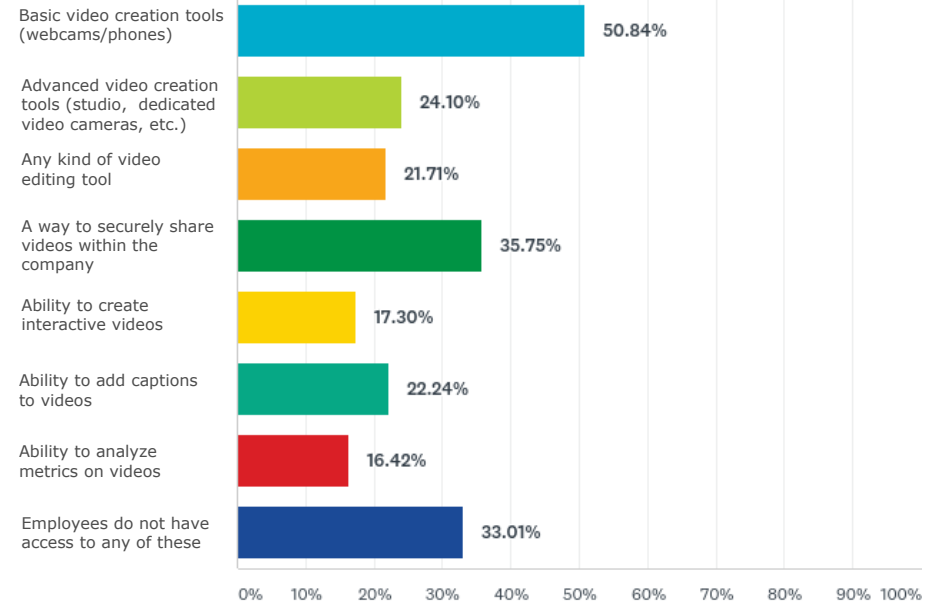
Perhaps most limiting, only **36% have a way to securely share videos** within the company, besides email. Email makes for a fairly unwieldy and insecure way to share videos, which will naturally slow down people's willingness to take advantage of video's potential, especially for complicated or sensitive information.

Suggested Action:

To take advantage of video's potential, especially to learn skills from coworkers, employees need access to video tools. Consider issuing simple capture software that takes advantage of webcams and phones employees might not even realize they can access.

While just over the majority of workers have basic video creation tools available, over a third see themselves as lacking access to even the rudimentary tools

Which of the following do employees at your organization have access to?



Variations by Region in Video Tools

Breaking tool availability out by region does yield some interesting insights. West North Central and East and West South Central lagged, with the most respondents saying that their employers did not give employees access to video creation tools. East North Central (home to Chicago and several other large cities) actually has the fewest people reporting a total lack of tools.

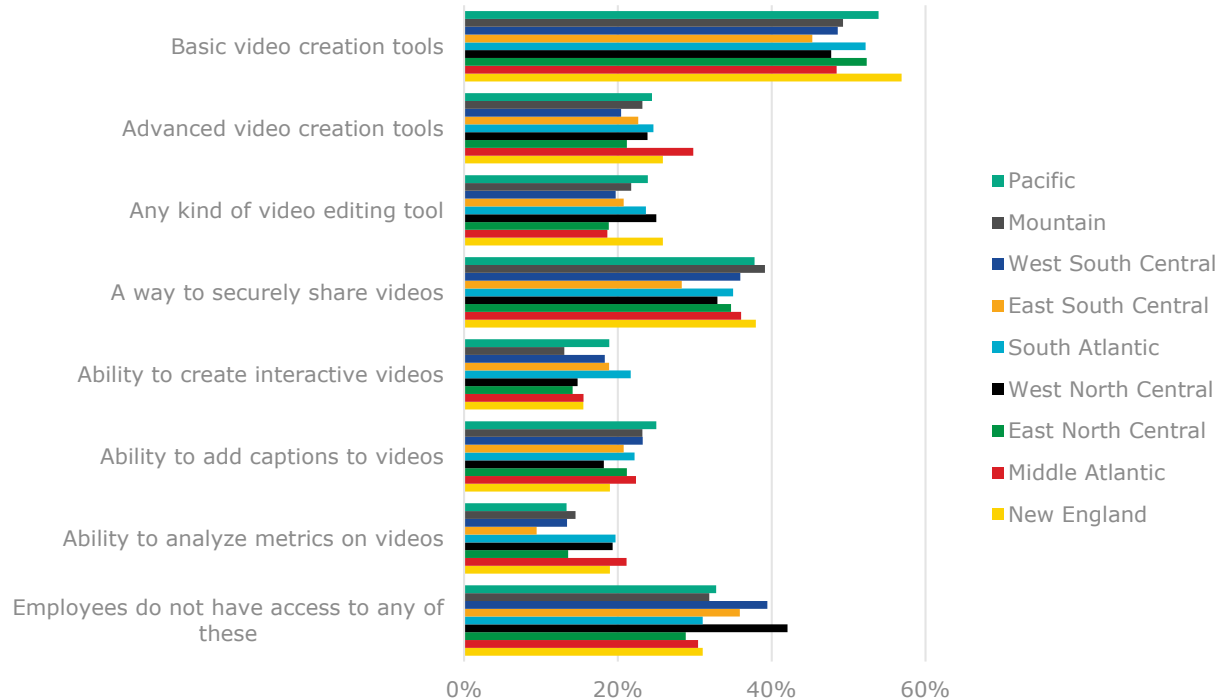
The areas most likely to offer at least basic video creation tools were New England, Pacific, East North Central, and South Atlantic. East South Central was least likely to offer basic video creation tools.

In general, regions with major urban centers seem more likely to empower employees to create their own videos than more sparsely inhabited regions.

**See Appendix III for a map of these regions.*

Denser populated areas more likely to have employers who empower employees to create video.

Which of the following do employees at your organization have access to?





Conclusions



Taking Full Advantage of the Power of Learning Videos

We know that **video use is growing across companies**, that **video is the most popular way to learn**, and that the **majority of workers use video to learn new skills**.

However, **many workers ignore at least some of their video training**, which makes it difficult to ensure that necessary skills will be passed on and compliance needs met.

In addition, while a **many employees have created videos on their own**, which can be leveraged to help share knowledge across the company, **many companies still don't provide their employees with the tools necessary to create and share video**.

Recommendations:

- Add interactive elements to videos to capture interest and increase engagement. This will lead to increased completion rates and better retention.
 - Getting easy-to-use interactive video tools so employees and training teams can create videos on their own without much overhead will be key.
- Include live broadcasts and virtual classrooms as part of your training strategy to leverage both the urgency of live interactions and the scalability and rewatchability of video.
- Take advantage of micro-learning to offer short, just-in-time training so employees can learn skills as they need them.
 - Make sure these videos are easy to search, find, and watch, even on the go.
- Empower employees to create their own videos to encourage them to share their knowledge and best practices with colleagues looking to learn important skills.
- Make sure to offer a way to share videos in a secure, searchable, and scalable manner, as well as a way to create them.
 - Making capture via phone easy and officially approved leverages the tools most employees already have so video creation can flourish without increasing overhead.



Appendices



Appendix I. Methodology

This survey is our sixth survey on the topic of enterprise video, but this year we used significantly different methodology.

This year's survey was conducted through SurveyMonkey Audience, targeting full-time employees of companies with 500 or more employees in the United States. There were no additional screening criteria. The survey was conducted in October 2019 in English.

Note that we did not report every single case of different results, since reporting this in an exhaustive manner is not practical and would impact the readability of the report. If you are interested in receiving information on anything specific that was not reported, please contact us at survey@kaltura.com.

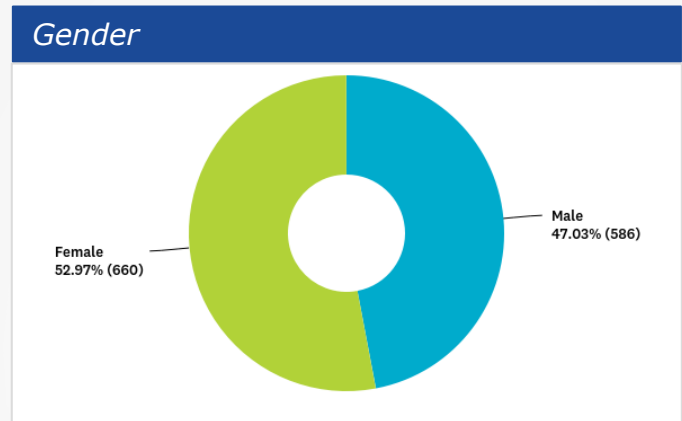
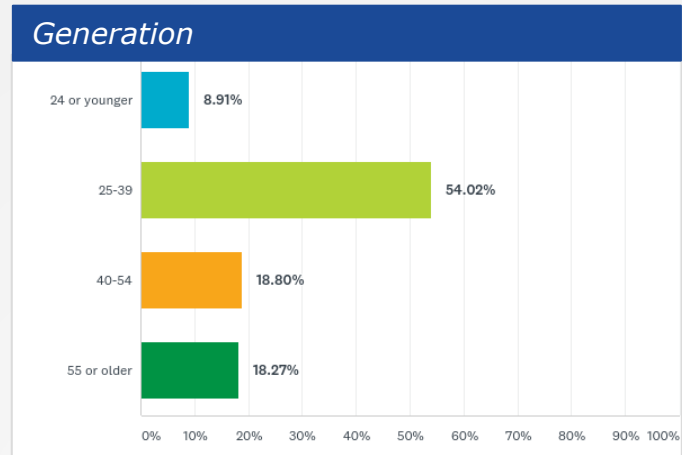


Appendix II. Demographics

The most interesting of the demographic data available is respondent age. For the purposes of this survey, generations were defined as the following in October 2019:

- 24 or younger: Generation Z
- 25-39: Millennial
- 40-54: Generation X
- 55 or older: Baby Boomer or older

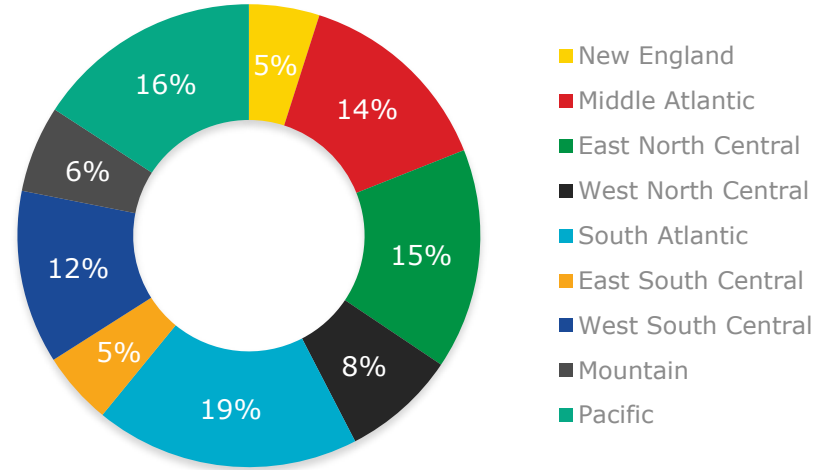
Respondents were fairly evenly split by gender.



For this particular survey, we chose to focus on the United States, which was fairly balanced, geographically.



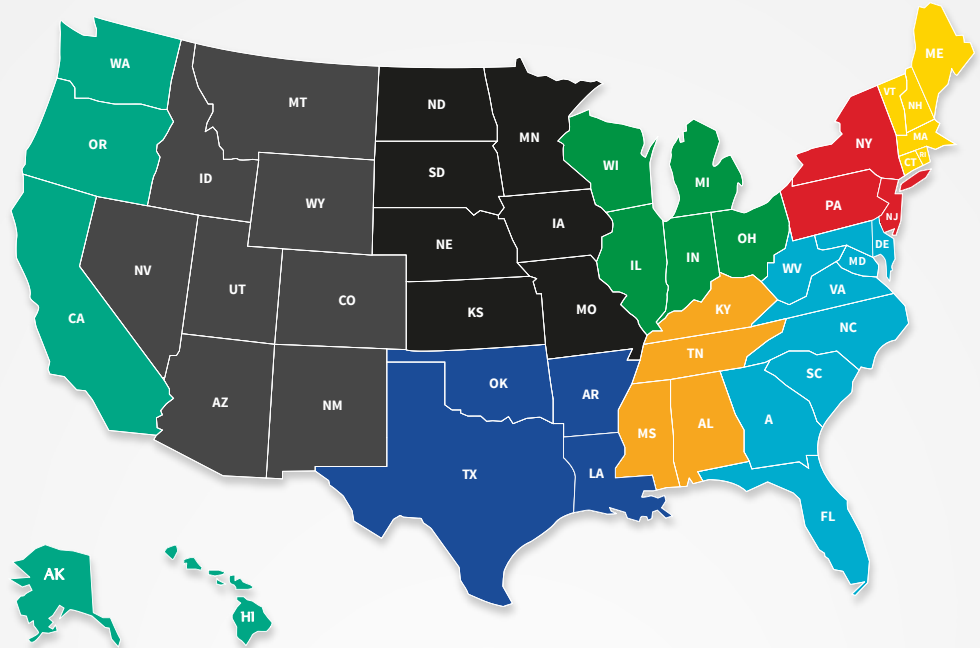
Location



Appendix III. Regions

Here you can find the breakdown of US regions referred to.

- Pacific
- Mountain
- West South Central
- East South Central
- South Atlantic
- West North Central
- East North Central
- Middle Atlantic
- New England





About Us

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

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