

WINTERGREEN RESEARCH, INC.

**Video's Role In The Enterprise Accelerates: Streaming  
Media Market Shares, Market Strategy, and Market Forecasts,  
2009-2015**

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**Enterprise Streaming Media**

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*Picture by Susie Eustis*

**MOUNTAINS OF OPPORTUNITY**

**WinterGreen Research, Inc.  
Lexington, Massachusetts**

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**CHECK OUT THESE KEY TOPICS**

**ENTERPRISE STREAMING MEDIA MARKET SHARES**

**Enterprise Streaming Media Market Forecasts**

**Streaming Media Applications**

**Enterprise Video Communications Needs Assessment Matrix**

**Enterprise Video Communications**

**Streaming Media H.246**

**Enterprise Market Categories**

**Broadband Streaming Media**

**Web 2.0 Streaming Media**

**Channel Streaming Media**

**Internet Access Streaming Media**

**Adobe Flash Streaming Media**

**Cisco TelePresence**

**Cisco WebEx**

**Microsoft Silverlight Platform**

**Apple QuickTime Streaming**

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## **Video's Role In The Enterprise Accelerates: Streaming Media Market Shares, Market Strategy, and Market Forecasts, 2009-2015**

The most startling shift in enterprise streaming media markets is the convergence of consumer and enterprise markets. Enterprise marketing departments have determined that they can leverage social networking and You Tube to introduce products and get visibility for a marketing effort.

Enterprise video communications is used in every aspect of sales, marketing, human resources, and management. Streaming media provides an efficient way of delivering content that is compelling and articulate. Leveraging video technology is a core part of distinguishing a brand.

Retail financial video solutions provide media representation of a range of different types of content. Streaming media solutions depend on developing advanced services targeted to customers. In a competitive retail-banking marketplace video can provide competitive advantage. Video control centers connect components of the video infrastructure together, providing overall management of the video assets, the video network, the display of video for end users, and reporting.

Streaming media relates to communicating ways of running the business, ways of providing customer services, ways of designing products. It is an ongoing challenge for many organizations to maximize the expertise of scarce subject matter experts. Recent increases in outsourcing make the challenge significant. Outsourcers are only as good as their training. Mediocre training leads to mediocre business results. Subject matter experts need to use video be able to communicate complex thoughts visually.

Streaming media can provide a presence that extends the reach of middle management and the effectiveness of business analysts. Travel for in-face meetings reduces productivity, is costly, and can cause significant delays and missed deadlines. Streaming media permits people to work remotely more effectively.

Digital signage enables publishing of video content to LCD and plasma displays for dynamic messaging, enabling the extension of enterprise communications beyond the desktop. Media delivery services provide live web casting that allows leveraging new or existing streaming media servers. Systems create a tightly connected, fully managed delivery network that provides a level of security and fault-tolerant reliability.

**Enterprise streaming media markets depend on systems that are poised for significant growth as people move to purchase systems for new marketing and Web based applications based on H.264 defacto industry standards and Web 2.0 technologies. An enterprise streaming media system has many aspects that range from managing complex videos as Web site information to translating formats. Systems work in the context of change every day, representing a market achievement in managing complexity with automated process. According to one of the leading vendor market product managers, “there is just so much, just so much...”**

**Streaming media markets are growing in response to increased availability of broadband enterprise and Internet networks. With product cycles shrinking from years to months, streaming media has become a significant marketing tool. Use of streaming media by marketing departments represents incredible acceleration opportunity for vendors.**

**The use of streaming media by IBM illustrates this trend as many, many product announcements feature shots on You Tube with videos that illustrate what is coming. As these companies succeed, there is the opportunity to increase bilateral sharing of business events and sharing using video technology. Information is doubling at a rate of once every 7 months and this rate of increase is growing. Video and media transport is part of that growth. Enterprise content management permits users to integrate a diverse set of technologies into a coherent product portfolio. The enterprise content management markets are anticipated to have exponential growth in content generation management and replication. Content-centric collaboration within enterprises is used to deploy technology solutions to address the information accumulation challenge.**

**Information is doubling at a rate of once every 7 months and this rate of increase is growing. Video and media transport is part of that growth. Enterprise streaming media permits users to integrate a diverse set of technologies into a coherent product portfolio. The enterprise streaming media markets are anticipated to have exponential growth as a result of the increased effectiveness of media presentation over words.**

**Content-centric collaboration within enterprises that is implemented with media is used to deploy technology solutions to address the information accumulation challenge.**

According to Susan Eustis, primary author of the study, "The ability to access information more rapidly using video, audio and media provides ways to use that information to make informed decisions. Streaming media is part of automated process contributing to significant market growth." Initiatives that use media to implement services oriented architecture (SOA) services are anticipated to create a climate for growth of automated process services. In this context image based, video content, or images in system modules are delivered by streaming. All the modules require management and indexing that is supported by streaming.

Enterprise streaming media markets at \$3.2 billion in 2008 are anticipated to triple to \$14.4 billion by 2014. Revenue from the worldwide market is anticipated to grow at in response to new technology that makes streaming more efficient than file transfer. Streamed videos can play almost as soon as the Internet transfer is commenced. File transfers must be complete before viewing of media content can begin.

## Companies Profiled

### Market Leaders

Apple  
Cisco  
RealNetworks  
Adobe / Macromedia  
Microsoft

### Market Participants

Abacast	Accordant Technologies, Inc.
Ateme	BitTorrent
Bubble Guru	DivX
Gotuit	iStream Planet
Media Excel Transcoder	Ortiva
Rambla	Real Networks
Telestream	Virage
Wowza	

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## Enterprise Streaming Media Systems Strategies and Forecasts 2009-2015

### REPORT METHODOLOGY

THIS IS THE 393<sup>TH</sup> REPORT IN A SERIES OF MARKET RESEARCH REPORTS THAT PROVIDE FORECASTS IN COMMUNICATIONS, TELECOMMUNICATIONS, THE INTERNET, COMPUTER, SOFTWARE, TELEPHONE EQUIPMENT, HEALTH EQUIPMENT, AND ENERGY. THE PROJECT LEADERS TAKE DIRECT RESPONSIBILITY FOR WRITING AND PREPARING EACH REPORT. THEY HAVE SIGNIFICANT EXPERIENCE PREPARING INDUSTRY STUDIES. FORECASTS ARE BASED ON PRIMARY RESEARCH AND PROPRIETARY DATA BASES. FORECASTS REFLECT ANALYSIS OF THE MARKET TRENDS IN THE SEGMENT AND RELATED SEGMENTS. UNIT AND DOLLAR SHIPMENTS ARE ANALYZED THROUGH CONSIDERATION OF DOLLAR VOLUME OF EACH MARKET PARTICIPATION IN THE SEGMENT. INSTALLED BASE ANALYSIS AND UNIT ANALYSIS IS BASED ON INTERVIEWS AND AN INFORMATION SEARCH. MARKET SHARE ANALYSIS INCLUDES CONVERSATIONS WITH KEY CUSTOMERS OF PRODUCTS, INDUSTRY SEGMENT LEADERS, MARKETING DIRECTORS, DISTRIBUTORS, LEADING MARKET PARTICIPANTS, OPINION LEADERS, AND COMPANIES SEEKING TO DEVELOP MEASURABLE MARKET SHARE. OVER 200 IN DEPTH INTERVIEWS ARE CONDUCTED FOR EACH REPORT WITH A BROAD RANGE OF KEY PARTICIPANTS AND INDUSTRY LEADERS IN THE MARKET SEGMENT. WE ESTABLISH ACCURATE MARKET FORECASTS BASED ON ECONOMIC AND MARKET CONDITIONS AS A BASE. USE INPUT/OUTPUT RATIOS, FLOW CHARTS, AND OTHER ECONOMIC METHODS TO QUANTIFY DATA. USE IN-HOUSE ANALYSTS WHO MEET STRINGENT QUALITY STANDARDS. INTERVIEWING KEY INDUSTRY PARTICIPANTS, EXPERTS AND END-USERS. OUR RESEARCH INCLUDES ACCESS TO LARGE PROPRIETARY DATABASES. LITERATURE SEARCH INCLUDES ANALYSIS OF TRADE PUBLICATIONS, GOVERNMENT REPORTS, AND CORPORATE LITERATURE.

**YOU MUST HAVE THIS STUDY**

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# Enterprise Streaming Media Strategies and Forecasts 2009 to 2015

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## **ABOUT THE COMPANY**

**WINTERGREEN RESEARCH**, HAS A UNIQUE RESEARCH STRATEGY THAT RELATES TO IDENTIFYING MARKET TRENDS THROUGH READING AND INTERVIEWING OPINION LEADERS. BY READING THE ELECTRONIC EQUIVALENT OF 40 FEET OF PAPER, WINTERGREEN RESEARCH SENIOR ANALYSTS CAN LEARN A LOT MORE ABOUT MARKETS, A LOT FASTER THAN CAN BE LEARNED THROUGH EXPENSIVE SURVEYS AND FOCUS GROUPS. THINKING ABOUT MARKET TRENDS IS A HIGH PRIORITY AT WINTERGREEN RESEARCH. AS WITH ALL RESEARCH, THE VALUE PROPOSITION FOR COMPETITIVE ANALYSIS COMES FROM INTELLECTUAL INPUT.

IT IS A LUXURY REALLY, AVAILABLE TO ONLY A VERY FEW PEOPLE, TO BE ABLE TO GATHER INFORMATION, LOTS OF INFORMATION FROM READING MASSIVE AMOUNTS OF CONTENT, AND THEN TRYING TO MAKE SENSE OF THAT CONTENT. THE ABILITY TO THINK ABOUT MARKET TRENDS IS ENHANCED BY DOING IT OVER AND OVER FOR MANY DIFFERENT MARKETS. THAT IS WHAT WINTERGREEN RESEARCH IS ALL ABOUT: READING AND THINKING IS AN ESSENTIAL ASPECT OF COMPETITIVE ANALYSIS. TALKING TO OPINION LEADERS IS THE THIRD ESSENTIAL ASPECT OF PRODUCING GOOD, RELIABLE DATA.

**WINTERGREEN RESEARCH**, FOUNDED IN 1985, PROVIDES STRATEGIC MARKET ASSESSMENTS IN TELECOMMUNICATIONS, COMMUNICATIONS EQUIPMENT, HEALTH CARE, INTERNET AND ADVANCED COMPUTER TECHNOLOGY. INDUSTRY REPORTS FOCUS ON OPPORTUNITIES THAT EXPAND EXISTING MARKETS OR DEVELOP MAJOR NEW MARKETS. THE REPORTS ASSESS NEW PRODUCT AND SERVICE POSITIONING STRATEGIES, NEW AND EVOLVING TECHNOLOGIES, AND TECHNOLOGICAL IMPACT ON PRODUCTS, SERVICES, AND MARKETS. MARKET SHARES ARE PROVIDED. LEADING MARKET PARTICIPANTS ARE PROFILED, AND THEIR MARKETING STRATEGIES, ACQUISITIONS, AND STRATEGIC ALLIANCES ARE DISCUSSED. THE PRINCIPALS OF WINTERGREEN RESEARCH HAVE BEEN INVOLVED IN ANALYSIS AND FORECASTING OF INTERNATIONAL BUSINESS OPPORTUNITIES IN TELECOMMUNICATIONS AND ADVANCED COMPUTER TECHNOLOGY MARKETS FOR OVER 30 YEARS.

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