2012 Global Lecture Capture Solutions
Market Share Leadership Award
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Frost & Sullivan’s Global Research Platform
Frost & Sullivan is in its 50th year in business with a global research organization of 1,800 analysts and consultants who monitor more than 300 industries and 250,000 companies. The company’s research philosophy originates with the CEO’s 360 Degree Perspective™, which serves as the foundation of its TEAM Research™ methodology. This unique approach enables us to determine how best-in-class companies worldwide manage growth, innovation and leadership. Based on the findings of this Best Practices research, Frost & Sullivan is proud to present the 2012 Global Market Share Leadership Award in Lecture Capture Solutions to Sonic Foundry.

Significance of the Market Share Leadership Award
Key Industry Challenges Addressed by Increased Market Share
Lecture capture solutions have taken the educational experience to its next incarnation by incorporating rich media into the learning environment more effectively than ever before. An institution’s faculty can create, edit and distribute presentations which can be watched live or on-demand, enabling students to put down their pencils, engage in the learning process, and review course content later from the comfort of their own homes, on-the-go, or before a test.

Frost & Sullivan defines lecture capture solutions as technologies that enable the capture, broadcast, and archival of presentations. Lecture capture solutions allow educational institutions to record and manage lectures and related content taking place in any learning environment. Any presentation content can be paired with the instructor’s video and audio. Students can access captured content through their university’s learning management system or portal and watch on their laptop or favorite mobile device in order to reinforce concepts and improve retention.

Lecture capture solutions were originally used primarily for on-demand viewing; however, Frost & Sullivan notes that increasing interest in live streaming functionality now is challenging the vendor community to provide live and on-demand viewing from a single platform with only a select few offering the capability to do so. Vendors today are broadening their markets by selling solutions for higher education as well for corporate learning and executive communications, emphasizing the value proposition of reaching the largest audience necessary in an engaging, interactive and controlled environment, whether on-demand or live. A handful of vendors have also focused on integrating with strategic academic platforms including scheduling solutions and conferencing platforms, among other infrastructure elements, to improve the end-user experience and more easily realize the value proposition for faculty, students and administrators alike.
For six consecutive years, Sonic Foundry has remained the market share leader of the lecture capture solutions market. The company continues to consistently enhance the features and functionality of its flagship solution, Mediasite, with academic customers in mind. As a result, no other vendor (even pure-play academic) has been able to unseat Sonic Foundry. Currently over 1000 academic institutions worldwide have deployed Mediasite to enhance on-campus, blended and distance learning initiatives.

**Best Practice Award Analysis for Sonic Foundry**

The Frost & Sullivan Global Market Share Leadership Award is presented to the company that has demonstrated excellence in capturing the highest market share within its industry. The Award recognizes the company's leadership position within the industry in terms of revenues or units, as specified.

**Sonic Foundry’s Performance in the Lecture Capture Solutions Market**

Currently, nine vendors comprise the lecture capture solutions market. The majority of vendors provide capture appliances and/or software solutions to academic institutions as well as enterprise customers. In 2011, the lecture capture market measured nearly $70 million in revenue. By 2016, Frost & Sullivan anticipates the total market to more than double, growing at a compound annual growth rate in excess of 20 percent. Heightened deployments in Europe, the Middle East, and Africa as well as Asia Pacific will be witnessed during the next five years, despite the current downturn. Additionally, the North America and Latin America market will continue to observe year on year increases in penetration of lecture capture solution deployments.

Each of the lecture capture vendors was compared on the basis of their respective market shares for 2011. Sonic Foundry leads the market, with product revenue comprising over 17 percent of total lecture capture market revenue. The company has led the market for over six consecutive years as a direct result of its dedication to the academic market. Key performance drivers that contribute to Sonic Foundry’s ongoing success include providing trusted, high performance solutions, achieving worldwide brand visibility resulting from extensive channel partnerships, and maintaining deep customer satisfaction and loyalty.

**Key Performance Drivers for Sonic Foundry**

**Factor 1: Sonic Foundry’s Trusted, High Performance Solution**

Sonic Foundry's flagship platform, Mediasite, provides seamless, automated capture, distribution and management of lectures, presentations and campus events.

Mediasite Recorders automatically capture high-definition video with high resolution presentation materials from laptops, tablets, document cameras or whiteboards, and webcasts these rich, immersive presentations live or on-demand to any computer or mobile device. Two recorder models provide greater flexibility to institutions. These
include Mediasite RL, which can be installed in a classroom or lecture hall and Mediasite ML for portable capture. Furthermore, Mediasite Recorders integrate with existing room control systems and videoconferencing end-points to capture and manage content from TANDBERG and Polycom. In addition to capture of content for on-demand viewing, Mediasite Recorders provide live streaming, which has increasingly been leveraged for webcasts of commencements, guest speakers, and sporting events.

Sonic Foundry is dedicated to providing a highly intuitive and interactive rich media experience to content creators and viewers alike on PC, Mac or mobile device – iOS, Android and BlackBerry. For the student, flexible playback includes the ability to rewind, pause, slow down, or fast forward to critical content. Powerful search capabilities allow students to quickly pinpoint the information they need in any presentation or course catalog. Captured lectures are accessed via single sign-on through LMSes such as Blackboard, Moodle, Instructure, Desire2Learn or Sakai.

Mediasite EX, Sonic Foundry’s video content management system provides a central repository to archive, manage, secure and track all Mediasite content as well as video content ingested from other recording devices or applications. Mediasite EX assists institutions in gaining greater insight into usage statistics and viewing trends via its advanced analytics. It also provides automated scheduling, directory-based authentication and keyword search across all presentation slides and audio tracks.

**Factor 2: Sonic Foundry’s Extensive Channel Relationships Promote Brand Visibility Worldwide**

Over 1000 educational institutions around the world have deployed Mediasite to bolster on-campus, blended and distance learning initiatives. Each year, Sonic Foundry has successfully expanded its install base of universities, community colleges, and technical institutions globally. The company leverages an extensive network of regional channel partners combined with direct sales to achieve penetration into emerging markets in Europe, the Middle East, and Africa, as well as Asia Pacific. This heightened brand visibility has enabled Sonic Foundry to remain the go-to vendor for institutions worldwide.

**Factor 3: Growth of Existing Deployments Resulting from Customer Satisfaction**

Sonic Foundry’s customers report a high degree of satisfaction, experiencing favorable outcomes with deployments. Mediasite’s ease-of-use, integration capabilities, and scalability are contributing factors to customer loyalty. Over the past three years, Sonic Foundry has witnessed increasing campus-wide deployments. Students also remain avid fans of Mediasite, reporting increased retention and improvement in course scores. In surveys, these students select courses that leverage Mediasite in conjunction with in-class lecture over traditional classroom environments.
Conclusion

Retention of a leading market position allows a vendor to enjoy heightened visibility, establish strong relationships with global clients, and evangelize the benefits of its technology. Sonic Foundry’s outstanding performance inspires participants in the lecture capture solutions market to strive for new levels of success. The company’s unique competitive perspective provides its worldwide customer base with technologies that dramatically enhance on-campus, blended and distance learning initiatives. Frost & Sullivan is therefore quite pleased to recognize Sonic Foundry with the 2012 Global Market Share Leadership Award.

The CEO 360 Degree Perspective™ - Visionary Platform for Growth Strategies

The CEO 360 Degree Perspective™ model provides a clear illustration of the complex business universe in which CEOs and their management teams live today. It represents the foundation of Frost & Sullivan's global research organization and provides the basis on which companies can gain a visionary and strategic understanding of the market. The CEO 360 Degree Perspective™ is also a “must-have” requirement for the identification and analysis of best-practice performance by industry leaders.

The CEO 360 Degree Perspective™ model enables our clients to gain a comprehensive, action-oriented understanding of market evolution and its implications for their companies’ growth strategies. As illustrated in Chart 5 below, the following six-step process outlines how our researchers and consultants embed the CEO 360 Degree Perspective™ into their analyses and recommendations.

Chart 2: The CEO’s 360 Degree Perspective™ Model
Critical Importance of TEAM Research

Frost & Sullivan’s TEAM Research methodology represents the analytical rigor of our research process. It offers a 360 degree view of industry challenges, trends, and issues by integrating all seven of Frost & Sullivan’s research methodologies. Our experience has shown over the years that companies too often make important growth decisions based on a narrow understanding of their environment, leading to errors of both omission and commission. Frost & Sullivan contends that successful growth strategies are founded on a thorough understanding of market, technical, economic, financial, customer, best practices, and demographic analyses. In that vein, the letters T, E, A and M reflect our core technical, economic, applied (financial and best practices) and market analyses. The integration of these research disciplines into the TEAM Research methodology provides an evaluation platform for benchmarking industry players and for creating high-potential growth strategies for our clients.

Chart 3: Benchmarking Performance with TEAM Research

About Frost & Sullivan

Frost & Sullivan, the Growth Partnership Company, enables clients to accelerate growth and achieve best-in-class positions in growth, innovation and leadership. The company's Growth Partnership Service provides the CEO and the CEO's Growth Team with disciplined research and best-practice models to drive the generation, evaluation and implementation of powerful growth strategies. Frost & Sullivan leverages 50 years of experience in partnering with Global 1000 companies, emerging businesses and the investment community from more than 40 offices on six continents. To join our Growth Partnership, please visit http://www.frost.com.