

Hot Vendors in Web and Video Conferencing, 2019

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Topic: Collaboration

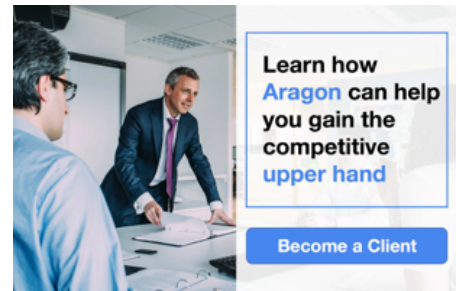
Issue: Who are the web and video conferencing providers and how are they impacting the market?

Summary

The web and video conferencing market is expanding as the demand for visual collaboration rises. With cloud continuing to drive new use cases and innovation, visual collaboration has become a strategic way to enhance the overall customer journey. This research note identifies one of the Hot Vendors who is making a difference in the market.

Aragon Research

2019 HOT VENDOR





Introduction

Today, web and video conferencing is a key element of team collaboration in many enterprises. As people become more comfortable using video in everyday meetings, the ability of providers to enable higher quality video meetings also continues to grow. Since participants are virtually face to face, video meetings also enable more information to be conveyed than in an audio-only meeting. This becomes especially important with customer meetings.

To enable the highest performance inside and outside of an enterprise, video meetings have become part of the high-performance digital workplace playbook. Besides internal meetings, it is also critical for enabling better and more personal customer engagement—as prospects, partners, and current customers have a better meeting experience and they often remember far more than they do from just an audio call.

The Evolution of Web and Video Conferencing

There are three ways that the WVC market is evolving. At the end of the day, enterprise buyers need to realize that given needs in the enterprise, it will not be uncommon to have three to five different providers.

First, the horizontal providers generally are either a best of breed provider or they have web and video meetings as part of a larger unified communications and collaboration portfolio.

Second, many WVC capabilities are becoming part of a digital work platform—where meetings are part of the overall platform. Microsoft and Google come to mind, but many best of breed providers offer their own integrations.

Third, some WVC providers specialize in a particular use case. There are some, such as enterprise video platform providers, that specialize in webcasting and others that really dive deep into

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virtual classrooms or webinars. Major providers offer all of these, but not all of the capabilities are as good as some of the dedicated providers.

People-Centric Collaboration is On the Rise

Enabling seamless and multi-modality communications and collaboration is the goal of people-centric collaboration (PCC). Over the last four years, web and video conferencing (WVC) providers have made video meetings much more seamless than in the past. The video-enabled PCC experience starts with the need to enable video meetings from anywhere and on any device. The caveat is that video experiences on mobile devices can vary, as does the ease of accessing meetings. WebRTC and more powerful smartphones have made video on-the-go a basic capability, which means sales and service people can take advantage of video meetings. This has resulted in lower-cost solutions acquiring substantial capabilities; basic web conferencing features are now essentially table stakes.

The PCC experience also extends to meeting rooms—so the expectation is that providers need to support mobile, desktop, and room devices for meetings and allow seamless switching between devices.

Today, WVC software is becoming much more of a tighter story and part of the PCC theme. The market still has dedicated video conferencing systems but now, they have become much more integrated with their own SaaS offerings and with third parties. In 2018, more providers offered increased flexibility in tying into existing offerings via integration and partnerships.

What is Intelligent Video?

There are two types of WVC providers: those that are best of breed and those that offer a more integrated experience with voice and messaging. The ability to integrate into other applications is now a must-have capability, as the need to collaborate in real-time is becoming part of the new digital work hub experience (the digital work hub is an emerging category of enterprise-grade software that facilitates and manages the creation, curation, and communication of business content from the individual to ecosystem level).

Going fully digital requires intelligence, and that means meetings need to be automated. Intelligent video rooms leverage artificial intelligence to understand what is going on with the active meeting, and the devices and the users who are involved. Many leading providers have taken significant steps to make their video room offerings intelligent and to make the meeting experience more personal through the use of HD video with auto-zoom and HD audio with auto muting of background noise.

Capability	Intelligent Video Platforms	Traditional Video
Sound Management	Yes	Yes
Intelligent Cameras	Yes	Yes
Auto Connect	Yes	Partial
3 rd Party Integration	Auto	Partial
HD Video	1080P and higher	Std. or 720P
HD Content Sharing	Yes	No
Digital Whiteboard	Yes	No

Figure 1: Today, intelligent video platforms are going further.

Enterprises need to realize that there is a difference when it comes to these room offerings. Classic offerings are unintelligent and provide basic video meeting capabilities, requiring people to ensure that the meeting starts and ends.

Web and Video Conferencing Integration Capabilities

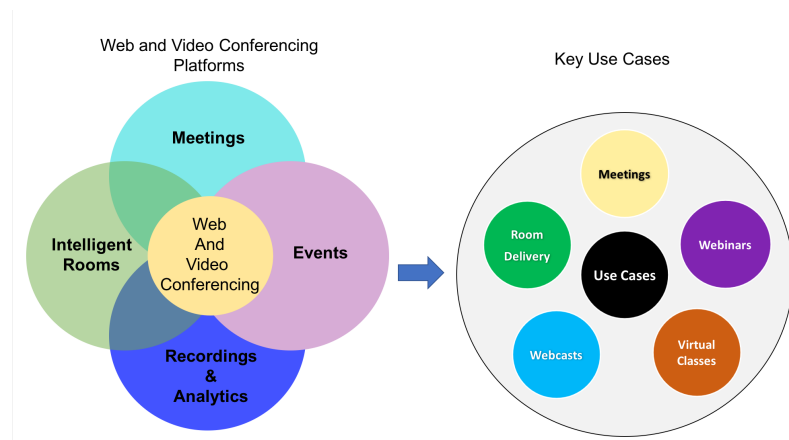


Figure 2: Web and video conferencing is part of an overall approach to unified communications and collaboration.

From a platform perspective, more providers are allowing their WVC capabilities to be integrated with third-party applications. They might integrate with Skype for Business; or Salesforce Sales and Service Cloud, like Cisco and Microsoft do; or they might even license their technology to be included in a platform, the way Polycom licenses its voice technology as an IaaS offering.

Today, most providers do not integrate with non-office access points, but we expect that to change, as buildings become fully digital and drones that have 4K video capabilities become integrated into office real estate and security applications.

Visual Collaboration and Digital Work Hubs

The increasing trend is to digitize not only conference rooms, but open workspaces and smaller huddle areas. Because of cloud and lower hardware prices, Aragon is seeing a fivefold growth in video-enabled conference rooms from 2018 to 2022. Increasingly, digital work hubs will include video meetings as a key requirement that offers seamless integration with day to day work applications (e.g. chat, mail, calendar, CRM).

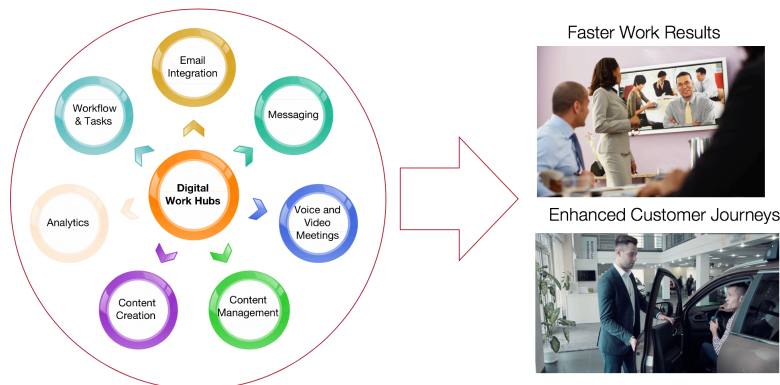


Figure 3: Digital work hubs will include video meetings as a standard capability.

This digitization is giving rise to more integrated workplace platforms and it demands more video collaboration. Real-time collaboration tools like video bring geographically dispersed teams together visually, which improves the collaboration experience and impacts work for the better.

Even more noticeably, the people within these global enterprises find their teams expanding to include co-workers in many other organizations and in different geographies and time zones. The new worker has to be much more collaborative across groups,

distances, and affiliations—and this is made possible through visual collaboration.

HD Video: 4K is Coming

Business users are demanding rich, immersive video. More providers can now deliver both 760P and 1080P video reliably, with some requirement for MPLS connectivity between campuses. Aragon recommends that enterprises push for 1080P usage given the increase in overall fidelity of the image quality.

While Apple has doubled down with even more support for 4K this year, the delivery of 4K video is still relegated to a handful of providers. In 2018, there was little movement. The secure reliable transport (SRT) standard, which enables better encoding and compression, could be a win if more providers end up adopting it.

Webcasting and Live Broadcasts

Webcasting continues to grow in popularity, and it is an important capability for internal and external-facing use cases. In many cases, webcasting can be a more proven delivery environment, and providers such as Fuze, MediaPlatform, Panopto, Qumu, uStudio, and vBrick have strong webcasting offerings.

Video broadcasting to large numbers of people is also a growing use case. Once popularized by applications such as Periscope, Vimeo Live, YouTube Live, and Facebook Live, applications such as Instagram Live are now a social media mainstay. The ability to do this in a consumer setting has become a target use case for events—marketers are drawn to live broadcast because it can increase demand and brand awareness.

Enterprises that do large scale events need to select a webcasting provider with a proven track record. Global delivery is not for the faint of heart and vendor capabilities should be validated.

The WVC Market Is Consolidating

Since collaboration providers have to support a wider range of use cases, we are seeing tremendous market consolidation occurring. Traditional providers are acquiring adjacent technologies and vendors to round out their portfolios and offerings. In 2018, after a very busy year in 2017, things slowed down. Siris Capital sold Polycom to Plantronics and Pexip announced that it was merging with Videxio. LogMeIn is still

integrating GoToMeeting, and Cisco is starting to integrate more of its Broadsoft calling options into its mainstream collaboration offerings.

Aragon expects that many WVC providers will add more voice and video analytics capabilities to their offerings. While automating meetings is also part of the race, the growth of intelligent content analytics for voice and video analytics means that many of those smaller providers are acquisition targets for WVC providers.

Hot Vendors in Web and Video Conferencing, 2019

This research note is not intended to be a complete list of vendors in the market being discussed. Rather, it highlights vendors with interesting, cutting-edge products, services, or technologies.

The 2019 Hot Vendors in Web and Video Conferencing include:

- **Lifesize**

Lifesize

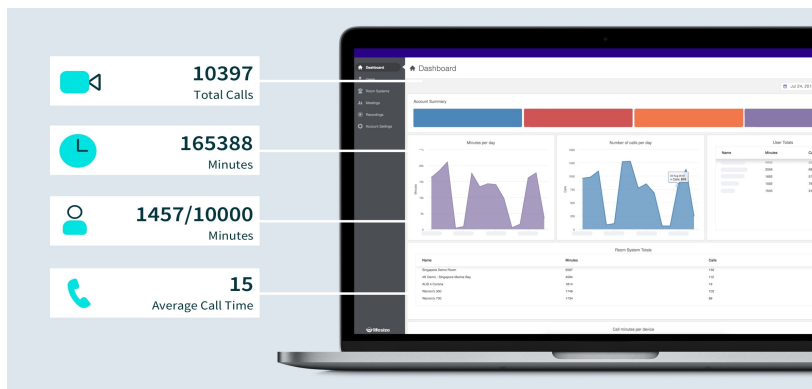


Figure 4: Lifesize includes a dashboard that allows you to see the number of calls, minutes, and users on the platform.

Lifesize, based in Austin, Texas and led by CEO Craig Malloy, offers a 4k based web, audio, and video conferencing platform that is marketed on a worldwide basis (see Figure 4 and Note 1).

Note 1: Lifesize at a Glance

Lifesize is an enterprise-grade audio, video, and web conferencing solution.

Location: Austin, Texas

CEO: Craig Malloy

Key Offerings: Lifesize Cloud conferencing, Meeting Room Devices, Lifesize Share

Availability: Available now

Website: www.lifesize.com

Lifesize was one of the first WVC providers to make 4K meetings available at an affordable price point and currently sells 4K-capable meeting room systems for small, medium and large conference rooms.

The Lifesize cloud service also offers the ability to record and share all online meetings, ranging from one-on-ones to full-scale company meetings. It also provides a management console where you can see the number of calls, minutes, users, and average call time, and edit the directory and free up unused meeting rooms. Lifesize is built on open standards and ensures security and privacy through default encryption for both media and signaling over its global network.

What makes Lifesize hot is its ability to provide a web, audio, and 4k video conferencing service that can seamlessly scale to the needs of an entire company while integrating with other workplace tools, including Microsoft Teams, Slack, Office 365, Exchange, Google G Suite, and single sign-on (SSO) providers.

Who Should Evaluate Lifesize?

Enterprises looking for a secure, large-scale web and video conferencing solution should evaluate Lifesize. Having a seamless company-wide audio, video, and web conferencing solution can enable productivity throughout the entire company.

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- Enterprises need to look holistically at web and video conferencing for quality, ease-of-use, and integration with other critical business applications.
- Enterprises may need to select more than one vendor due to use cases for webinars, webcasts, and industry vertical solutions, such as healthcare.
- Enterprises should ask for detailed roadmaps from providers to ensure that they mesh with the existing enterprise technology and business direction.
- When evaluating video conferencing products, understand the performance and quality characteristics for local, national, and international meetings. This may mean doing performance testing before signing any significant contract.

Bottom Line

The web and video conferencing market continues to be critical to the enterprise. With a significant shift to the cloud, more use cases have emerged that make APIs and integrations more important than in the past. Overall user experience and overall quality of voice and video meetings are still critical requirements for buyers. Intelligent video rooms are quickly becoming a preferred choice, given the automation and quality that they can deliver. Enterprises should evaluate these Hot Vendors for their web and video conferencing offerings.