Next Generation Video Conferencing and Collaboration

Webtorials Editorial/Analyst Division
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Survey Panel

- Data collected late August, 2010
- Targeted panel of approximately 2,000 key Webtorials community members
  - All had recently shown interest in video, unified communications, or similar topics
  - Tend to be early adopters and leading-edge companies
  - Greater than 10% response percentage
- Filtered results
  - More than 150 respondents with more than 250 employees in the company
  - Worldwide responses with 56% from North America
  - "NA/Don't know" generally excluded from charts
- This research was made possible in part due to the generous support of Avaya
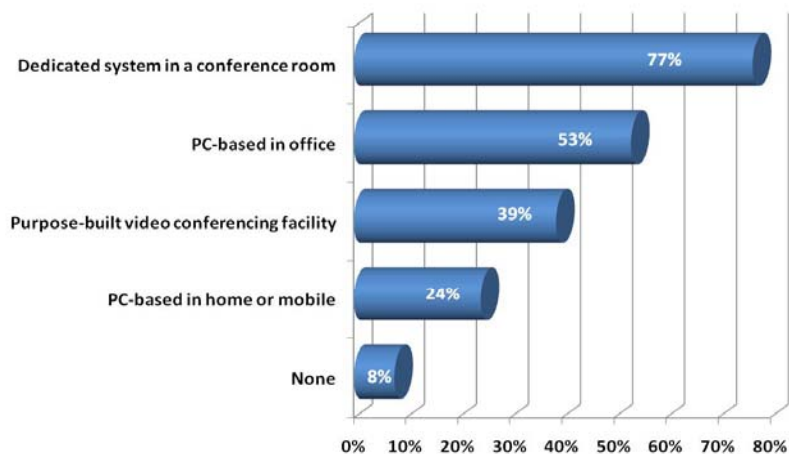
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Key Findings

- Videoconferencing is already a key part of intra-company collaboration
  - Scheduled conferences with special conference rooms are most common
- Significant growth is seen for ad hoc and inter-company conferencing
  - Scheduled conferences both present challenges and are fairly well saturated
- Major drivers include increased productivity as well as "hard" financial savings
- The introduction of easy-to-use desktop videoconferencing will be a major driver for achieving goals and overcoming current obstacles.
  - Major objections are met by emerging technologies and services
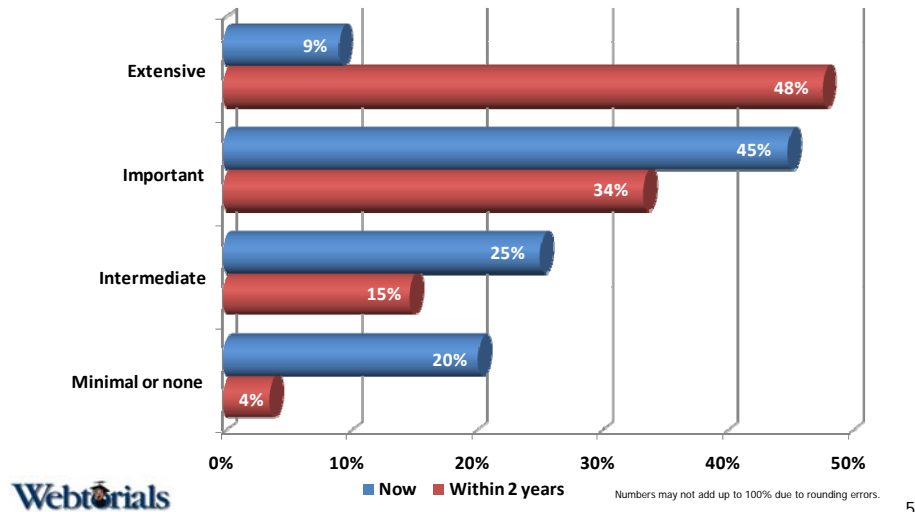
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Current Conferencing Systems

- What type of video conferencing system/applications does your organization use? (Please check all that apply.)

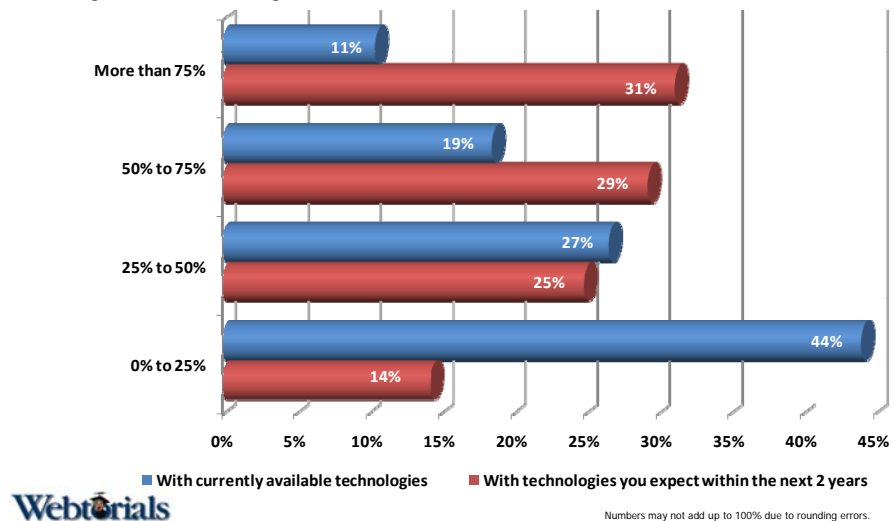|	
Dedicated system in a conference room	77%
PC-based in office	53%
Purpose-built video conferencing facility	39%
PC-based in home or mobile	24%
None	8%

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Video / UC & Collaboration

- To what extent do you see video conferencing as an integral component of unified communications and collaboration?

Extensive
- Now: 9%
- Within 2 years: 48%

Important
- Now: 45%
- Within 2 years: 34%

Intermediate
- Now: 25%
- Within 2 years: 15%

Minimal or none
- Now: 20%
- Within 2 years: 4%

0%   10%   20%   30%   40%   50%

■ Now   ■ Within 2 years

Numbers may not add up to 100% due to rounding errors.

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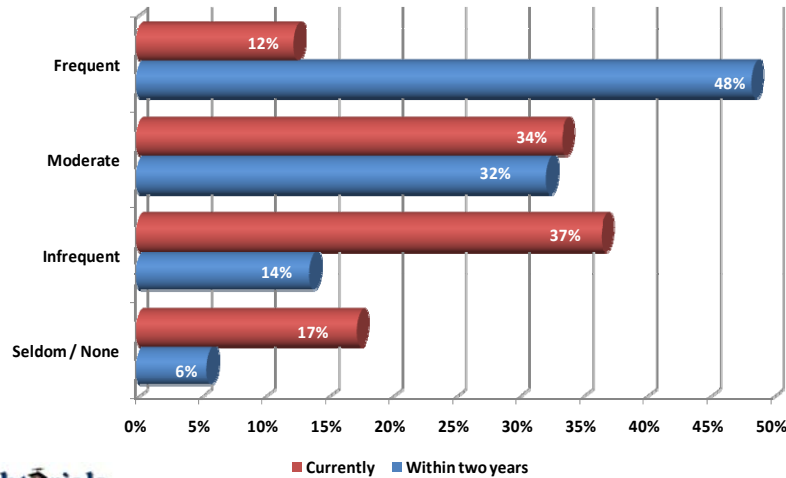
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Employees / UC & Collaboration

- Of the employees in your organization, approximately what percentage could find significant advantages from the use of unified communications and collaboration?

More than 75%
- With currently available technologies: 11%
- With technologies you expect within the next 2 years: 31%

50% to 75%
- With currently available technologies: 19%
- With technologies you expect within the next 2 years: 29%

25% to 50%
- With currently available technologies: 27%
- With technologies you expect within the next 2 years: 25%

0% to 25%
- With currently available technologies: 44%
- With technologies you expect within the next 2 years: 14%

0%   5%   10%   15%   20%   25%   30%   35%   40%   45%

■ With currently available technologies   ■ With technologies you expect within the next 2 years

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Numbers may not add up to 100% due to rounding errors.

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Video Conferencing Usage - Personal

- How would you characterize your use of video conferencing now and as anticipated in two years?

Frequent
- Currently: 12%
- Within two years: 48%

Moderate
- Currently: 34%
- Within two years: 32%

Infrequent
- Currently: 37%
- Within two years: 14%

Seldom / None
- Currently: 17%
- Within two years: 6%

0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50%

■ Currently ■ Within two years

Numbers may not add up to 100% due to rounding errors.
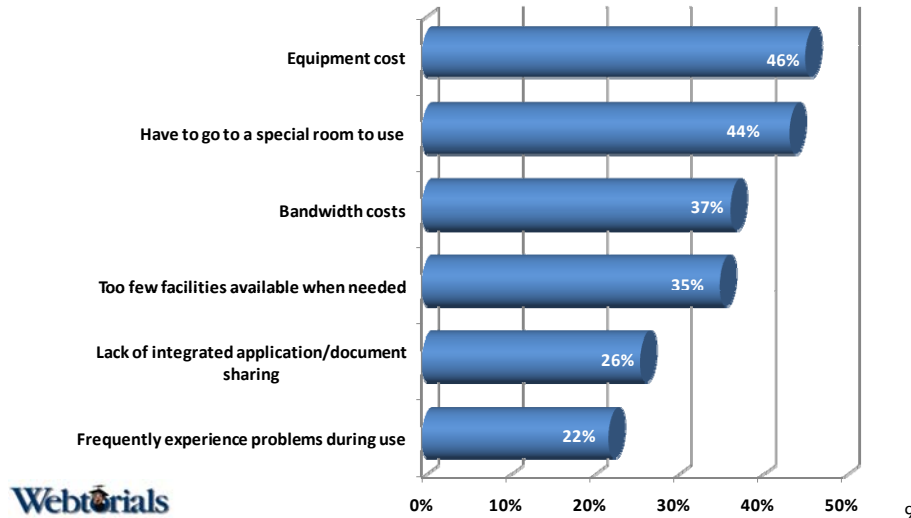
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Video Conferencing Usage – Organization

- Which characteristics below describe your organization's video conferencing use now and as anticipated in two years?
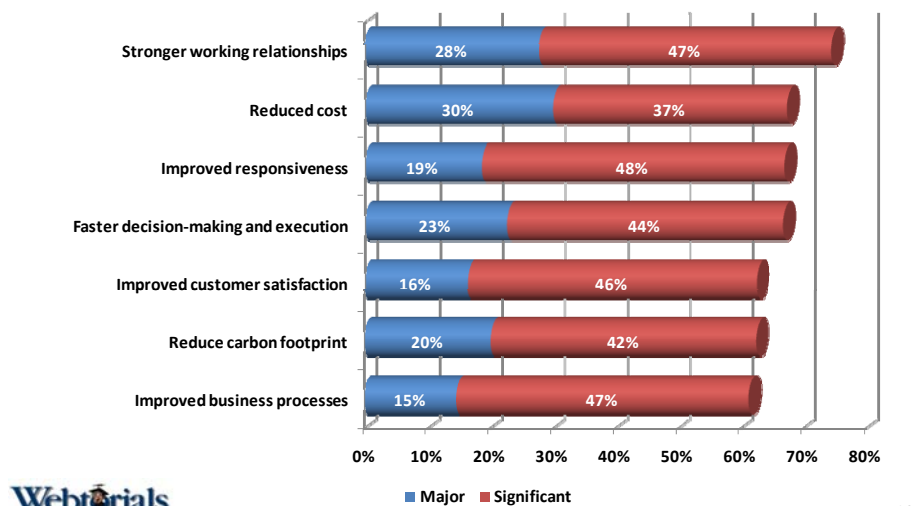
Internal to our organization
- Scheduled meetings now: 75%
- Scheduled meetings within 2 years: 72%
- Unscheduled meetings now: 49%
- Unscheduled meetings within 2 years: 60%

With external organizations
- Scheduled meetings now: 45%
- Scheduled meetings within 2 years: 73%
- Unscheduled meetings now: 16%
- Unscheduled meetings within 2 years: 50%

■ Scheduled meetings now   ■ Scheduled meetings within 2 years
■ Unscheduled meetings now ■ Unscheduled meetings within 2 years

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Obstacles

- When you think about video conferencing today, what obstacles prevent you from using it, or using it more often?

Obstacle	Percentage
Equipment cost	46%
Have to go to a special room to use	44%
Bandwidth costs	37%
Too few facilities available when needed	35%
Lack of integrated application/document sharing	26%
Frequently experience problems during use	22%

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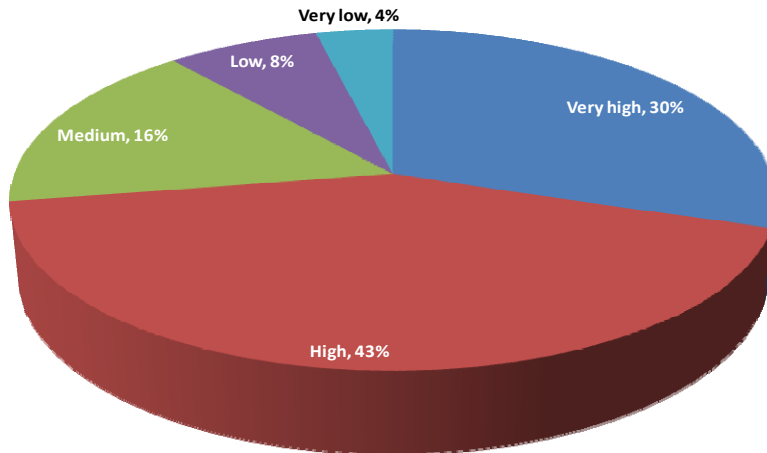# Benefits

- What is your assessment of how increased face-to-face interaction via video conferencing could benefit your organization?

Benefit	Major	Significant
Stronger working relationships	28%	47%
Reduced cost	30%	37%
Improved responsiveness	19%	48%
Faster decision-making and execution	23%	44%
Improved customer satisfaction	16%	46%
Reduce carbon footprint	20%	42%
Improved business processes	15%	47%

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Travel Expense Reduction

- Among your organization's business objectives, where does reducing travel expenses for meetings rank? (Internal Meetings)
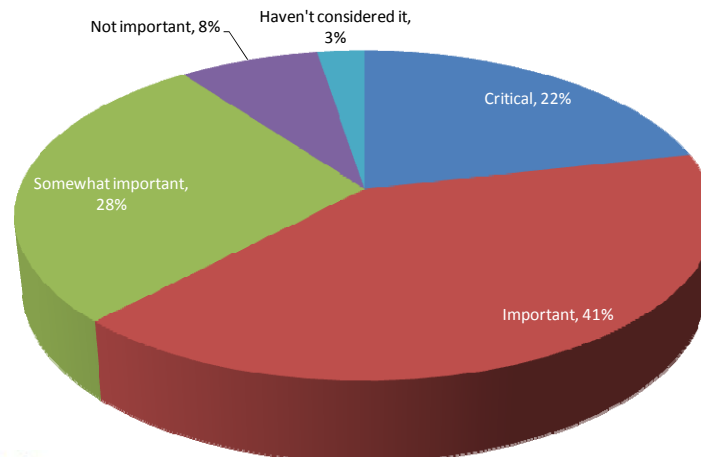
Very low, 4%

Low, 8%

Medium, 16%

Very high, 30%

High, 43%

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Role of Video Conferencing

- How important is video conferencing in your plans to reduce travel expenses?

Internal meetings

Not important, 8%

Haven't considered it, 3%

Somewhat important, 28%

Critical, 22%

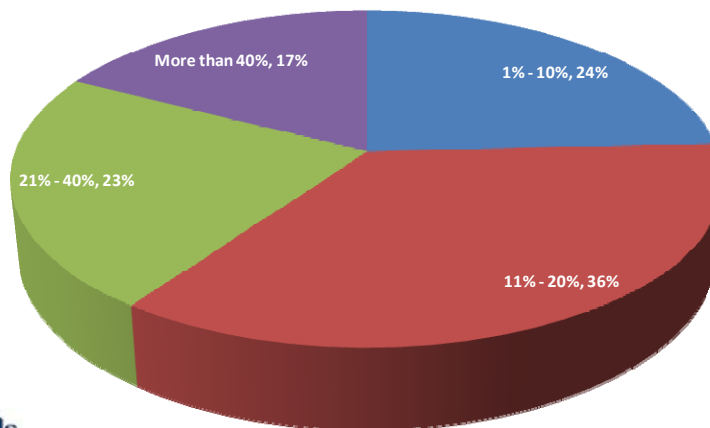Important, 41%

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Travel Expense % Reduction

- By how much could you reduce your travel budget if video conferencing were easier and more widely used? **Internal meetings**
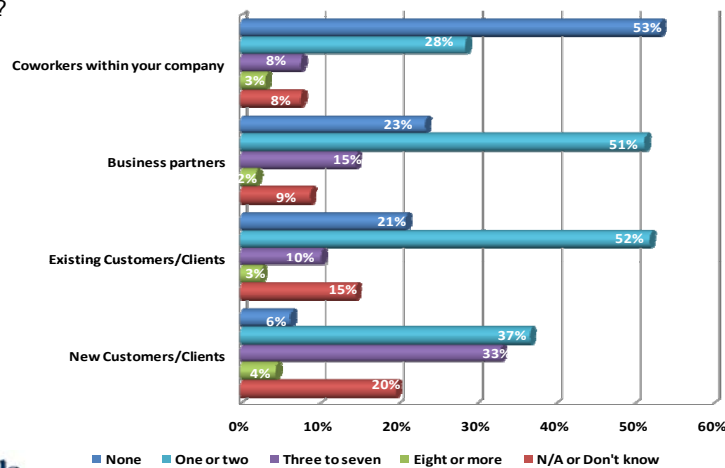

More than 40%, 17%

21% - 40%, 23%

1% - 10%, 24%

11% - 20%, 36%

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In Person Meetings Required

- It is widely presumed that video conferencing is most effective after a personal relationship of some form is established. How many meetings in person are needed before starting to use video conferencing with each of the following groups?


Coworkers within your company
- 53%
- 28%
- 8%
- 3%
- 8%

Business partners
- 23%
- 51%
- 15%
- 2%
- 9%

Existing Customers/Clients
- 21%
- 52%
- 10%
- 3%
- 15%

New Customers/Clients
- 6%
- 37%
- 33%
- 4%
- 20%

0%   10%   20%   30%   40%   50%   60%

■ None   ■ One or two   ■ Three to seven   ■ Eight or more   ■ N/A or Don't know
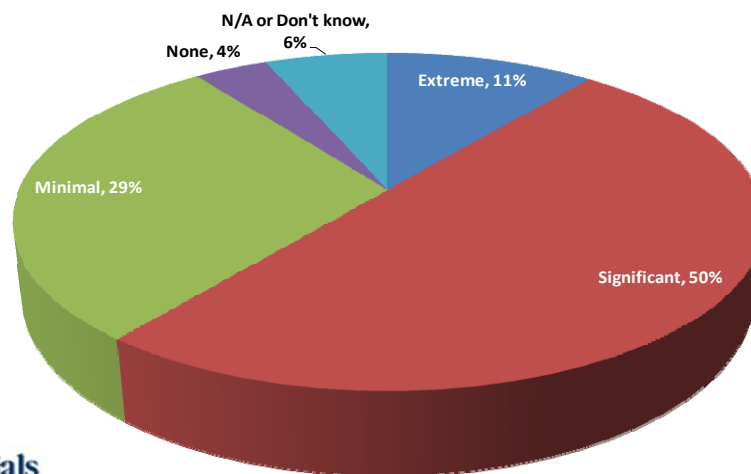
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Video Conferencing Usage

- With a simple, intuitive, fast video conferencing solution on your desktop or laptop you would use video conferencing:

Would not use it, 4%

The same, 19%

Much more often, 25%

More often, 53%

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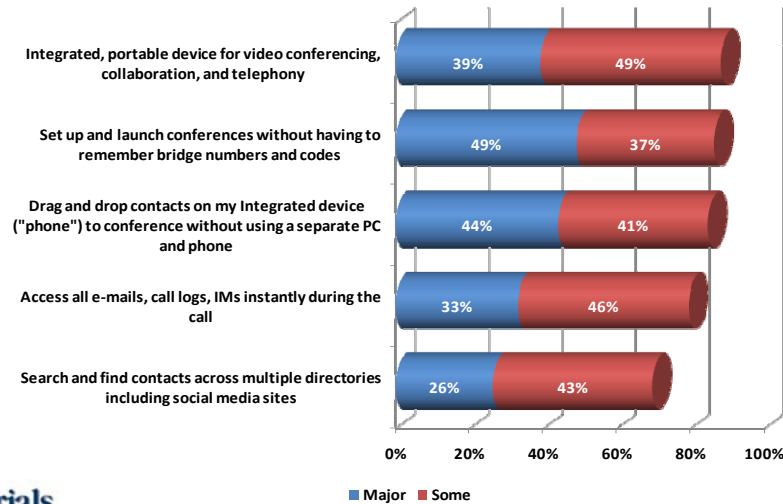
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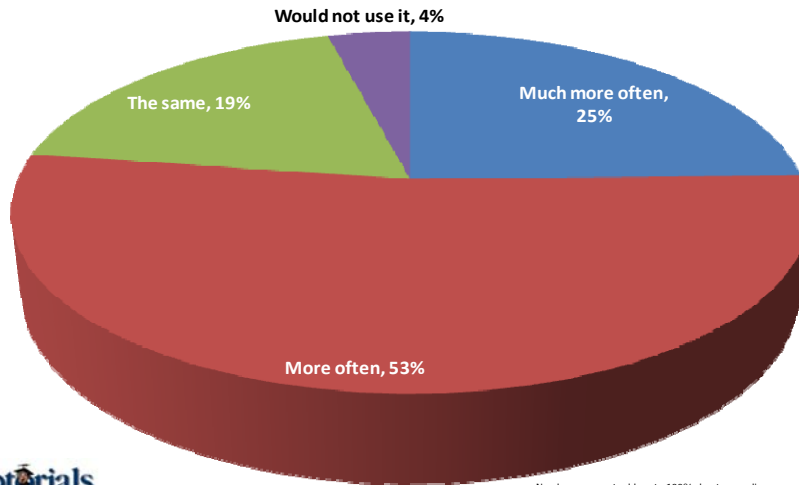
High Quality Video – Value Added

- Assuming that you are currently using collaborative tools for document sharing, desktop sharing, etc, how much value does/would the addition of integrated high-quality video bring to the experience?

N/A or Don't know, 6%

None, 4%

Extreme, 11%

Minimal, 29%

Significant, 50%

Numbers may not add up to 100% due to rounding errors.

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Collaboration / Productivity Impact

- How much impact would each of the following capabilities have on your video conferencing/collaboration experience and productivity?

Capability	Major	Some
Integrated, portable device for video conferencing, collaboration, and telephony	39%	49%
Set up and launch conferences without having to remember bridge numbers and codes	49%	37%
Drag and drop contacts on my Integrated device ("phone") to conference without using a separate PC and phone	44%	41%
Access all e-mails, call logs, IMs instantly during the call	33%	46%
Search and find contacts across multiple directories including social media sites	26%	43%

0%   20%   40%   60%   80%   100%
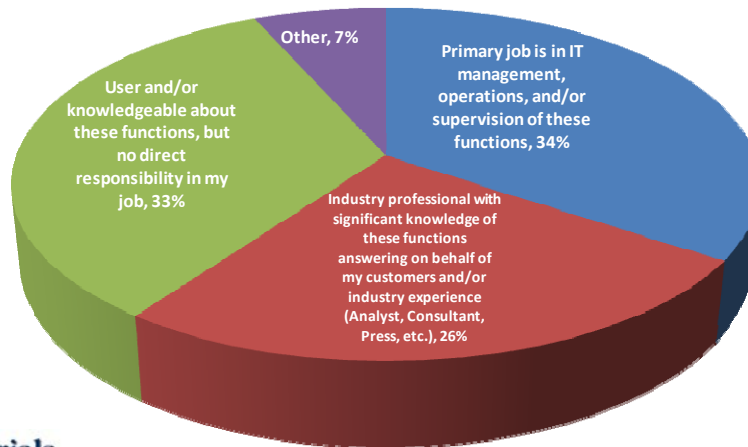
■ Major ■ Some

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Summary - Key Findings

- Videoconferencing is already a key part of intra-company collaboration
  - Scheduled conferences with special conference rooms is most common
- Significant growth is seen for ad hoc and inter-company conferencing
  - Scheduled conferences both present challenges and are fairly well saturated
- Major drivers include increased productivity as well as "hard" financial savings
- The introduction of easy-to-use desktop videoconferencing will be a major driver for achieving goals and overcoming current obstacles.
  - Most of the objections are met by emerging technologies and services

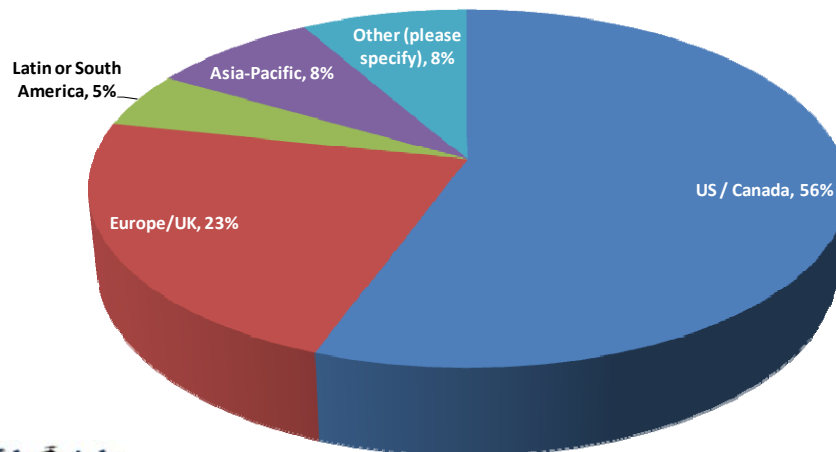**Webtorials**

Demographics

- Survey responders:

Role

Other, 7%

User and/or knowledgeable about these functions, but no direct responsibility in my job, 33%

Primary job is in IT management, operations, and/or supervision of these functions, 34%

Industry professional with significant knowledge of these functions answering on behalf of my customers and/or industry experience (Analyst, Consultant, Press, etc.), 26%

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Numbers may not add up to 100% due to rounding errors. 19

Demographics

- Survey responders:

Corporate Location

Other (please specify), 8%

Asia-Pacific, 8%

Latin or South America, 5%
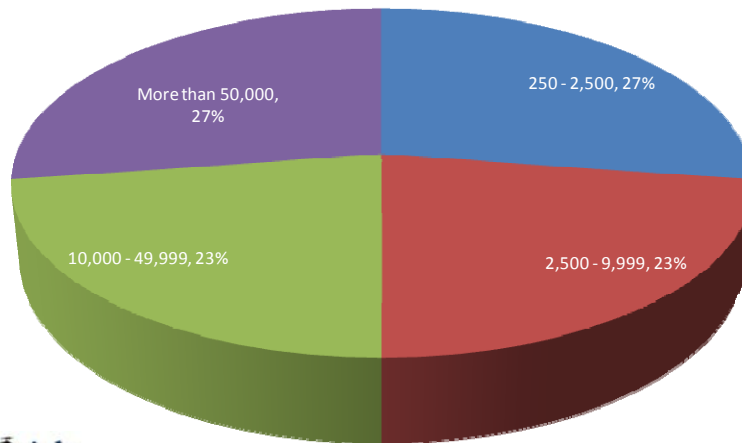
Europe/UK, 23%

US / Canada, 56%

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Demographics

- Survey responders:

Company Size

More than 50,000, 27%

250 - 2,500, 27%

10,000 - 49,999, 23%

2,500 - 9,999, 23%

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Numbers may not add up to 100% due to rounding errors.   21