



Market Sizing & Forecast

2016 Web Conferencing Suppliers Worldwide Market Sizing & 5-Year Forecast

Market Sizing & 5-Year Forecast
of Revenues from Suppliers of
Web Conferencing Products & Services

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Analyst: Andy Nilssen

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Overview

This forecast covers the worldwide market for suppliers of web conferencing on-premise products and hosted / cloud services. Web conferencing solutions typically consist of a network server that connects two or more clients to a real-time, multiparty graphics / data sharing session. Participants typically connect using a personal computer and a web browser or a mobile device such as smartphone or tablet. Almost all leading web conferencing solutions also capture and mix VoIP / PSTN audio and desktop video streams; some interoperate with standards-based room video conferencing systems.

Specifically, the offerings included in this forecast are:

- Web conferencing server software – Software that runs on either a physical or virtual server platform; the server is then connected to either a corporate intranet or the public Internet. Variations on this deployment model include software that runs on a dedicated hardware appliance and software that runs as a dedicated virtual instance on cloud computing services (such as Amazon Web Services, AWS)
- Web conferencing hosted services – A service provider hosts web conferencing sessions on servers (that the provider owns and maintains) for users' access via the Internet. Sessions are usually sold on a per meeting host per month basis; how many participants are supported per session varies with price.
- Web conferencing sold as part of a larger application suite – Increasing in popularity, web conferencing is integrated with other collaboration and / or productivity elements to create a collaboration suite – typically unified communications (Microsoft Skype for Business) or the emerging persistent collaboration spaces (Cisco Spark, Slack). For these deployments, this study attempts to place *a dollar value on the web conferencing component as a subset of the total price of the suite* – thus the revenues shown for collaboration suites are those estimated by WR to be associated with the value of web conferencing only (not the full suite). Collaboration suites are sold as on-premise software and as hosted services (including UCaaS, or Unified Communications as a Service).

Definitions

Some key terminology used in this market study is:

- All figures are **worldwide figures**. We generally denote revenues in millions of US dollars, except for obvious figures such as average selling prices (ASPs).
- All market size estimates are based on **supplier revenues**. This means that our figures tie very closely to the sum of the reported revenues of the suppliers of web conferencing solutions. However, this also means that we do not capture the revenues that accrue in the channel, including most conferencing / collaboration service providers (CSPs) who resell web conferencing services (e.g. InterCall's margin revenues for reselling WebEx, Arkadin's margin revenues for reselling Adobe Connect, etc.).¹

< End of TOC Summary >

¹ Note that WR's CSP Services market sizing studies include channel margins.