

Market Survey

2017 Video Conferencing End User Survey

VC-SURV17-EU Analysts: Andy Nilssen, Ira M. Weinstein December 2017



Table of Contents

Method	dology	. 1
Key Ta	keaways	. 1
Survey	Results	. 2
Intro	duction	. 2
Dem	ographics	. 2
1)	What is your organization's relationship to the Conferencing and Collaboration industry?	. 2
	Have you hosted or participated in a business meeting that used video conference within the paree weeks?	
	Please provide us with your contact information so that we may notify you if you win one of the zes	. 3
•	What is the size of your organization?	
,	Where are you located?	
6)	Which best describes your job title or description?	. 4
7)	Which best describes your involvement with your organization's desktop, mobile, or room video nferencing solutions?	
Conf	erencing Behavior and Characteristics	. 5
8)	How often do you participate in the following conference calls?	. 5
9)	What percent of your conference calls involve the following media technologies?	. 6
10) Do you think the mix of media in your conference calls will change over the next year?	. 6
Char	nges in the Workplace / VC Deployments	. 7
) Looking at your organization's meeting rooms: how familiar are you with any changes in the mix room sizes and how the rooms are equipped?	
12) Has your organization's mix of meeting rooms and workspaces changed over the past two years	
) What percent of your organization's meeting rooms are outfitted with the following video nferencing equipment?	10
) What are your organization's plans for deploying video conferencing equipment in these rooms er the next year?	11
) How would you rate the overall "quality of experience" when using your current video nferencing solutions?	12
) What percent of your "meeting room" video conference calls involve connecting with a participar cated outside of your organization?	
Pers	onal VC and Unified Communications	14
) How often do you participate in a conferencing call that involves video using the following rsonal devices?	14
) What application does your organization provide for employees to participate in a video nference using their personal device (PC / laptop / mobile)?	15
19) What application do you think your organization will be using in 18 months?	15
) How would you rate the overall "quality of experience" when using the "personal" video nferencing solution you selected?	16

She	Alice has a laptop with the video conferencing application (the VC app) that you selected above. e wants to video conference with participants that are in one of your organization's meeting room w does she accomplish this?	s.
About th	he Authors1	8
Table	e of Figures	
Figure 1	1 – Size of Organization	3
Figure 2	2 – Location of Respondent	3
Figure 3	3 – Job Title of Respondent	4
Figure 4	4 - Involvement with conferencing solutions	4
Figure 5	5 – Frequency of Conference Call Types	5
Figure 6	6 – Media Used in Conference Calls	6
Figure 7	7 – Anticipated Change in Media Use	6
Figure 8	8 – Familiarity with Meeting Room Sizes and Tech	7
Figure 9	9 – Change in Meeting Room Mix	8
Figure 1	10 – Meeting Room Mix Year-over-Year	9
Figure 1	11 – VC Equipment used in Meeting Rooms1	0
Figure 1	12 – VC deployment plans by room size1	1
Figure 1	13 – VC Quality of Experience by room size1	2
Figure 1	14 – VC Calls Outside of Organization1	3
Figure 1	15 - Conference Calls with Video from Personal Devices	4
Figure 1	16 - VC Applications used with Personal Devices1	5
Figure 1	17 – Personal VC Quality of Experience1	6
Figure 1	18 - Personal VC to Room VC Solution1	7

Methodology

In December 2017, Wainhouse Research (WR) conducted its annual on-line survey of video conferencing end users. Invitations to take the survey were sent via email to two sources: a) end users in WR's database – which lean towards being avid video conferencing users, and b) a sample that fit the survey's profile using the services of a third-party survey panel provider - knowledge workers that had participated in a video conference during the past three weeks. 197 responses were validated to fit the desired end user profile – about half from each source.