
Interactive Media Strategies Research Report

Collaboration and Its Convergence with Online Video:

How Trends in Web Conferencing
Will Impact Demand for
Business Online Multimedia

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Table of Contents

I. Introduction	3
II. The Nature of Collaboration Use Today.....	4
III. How Collaboration and Multimedia Intersect.....	7
III. Collaboration Tenure and Usage Trends.....	11
IV. Conclusions and Recommendations.....	14

Exhibits*

Exhibit 1: Web Conferencing Deployment Tenure, Segmented by Company Size

Exhibit 2: Frequency of Individual Use of Web Conferencing - Overall Respondents

Exhibit 3: Frequency of Individual Use of Web Conferencing - Segmented by Functional Discipline

Exhibit 4: Frequency of Usage for Web Conference Meeting Type - Overall

Exhibit 5: Companies Spending More than \$50,000 Annually on Online Multimedia, Segmented by Annual Web Conferencing Budget

Exhibit 6: Online Video Usage Segmented by Frequency of Web Conferencing Usage

Exhibit 7: "Most Engaging" Element of Web Communications, Segmented by Frequency of Web Conferencing Usage

Exhibit 8: Usage of Co-Worker Collaboration, Segmented by Web Conferencing Deployment Tenure

Exhibit 9: Usage of External Collaboration, Segmented by Web Conferencing Deployment Tenure

Exhibit 10: Usage of Webcam Collaboration, Segmented by Web Conferencing Deployment Tenure

Exhibit 11: Origination of Majority of Webcasts, Segmented by Web Conferencing Deployment Tenure

*** All Statistical Results Presented Represent Results from the Interactive Media Strategies' Enterprise Web Communications Survey, conducted in the Second Quarter of 2008, In the survey, 1,212 corporate executives were asked to detail their use, deployment and perceptions of a wide range of Web Communications technologies, including online multimedia, rich media, Web Conferencing, instant messaging and podcasting.**

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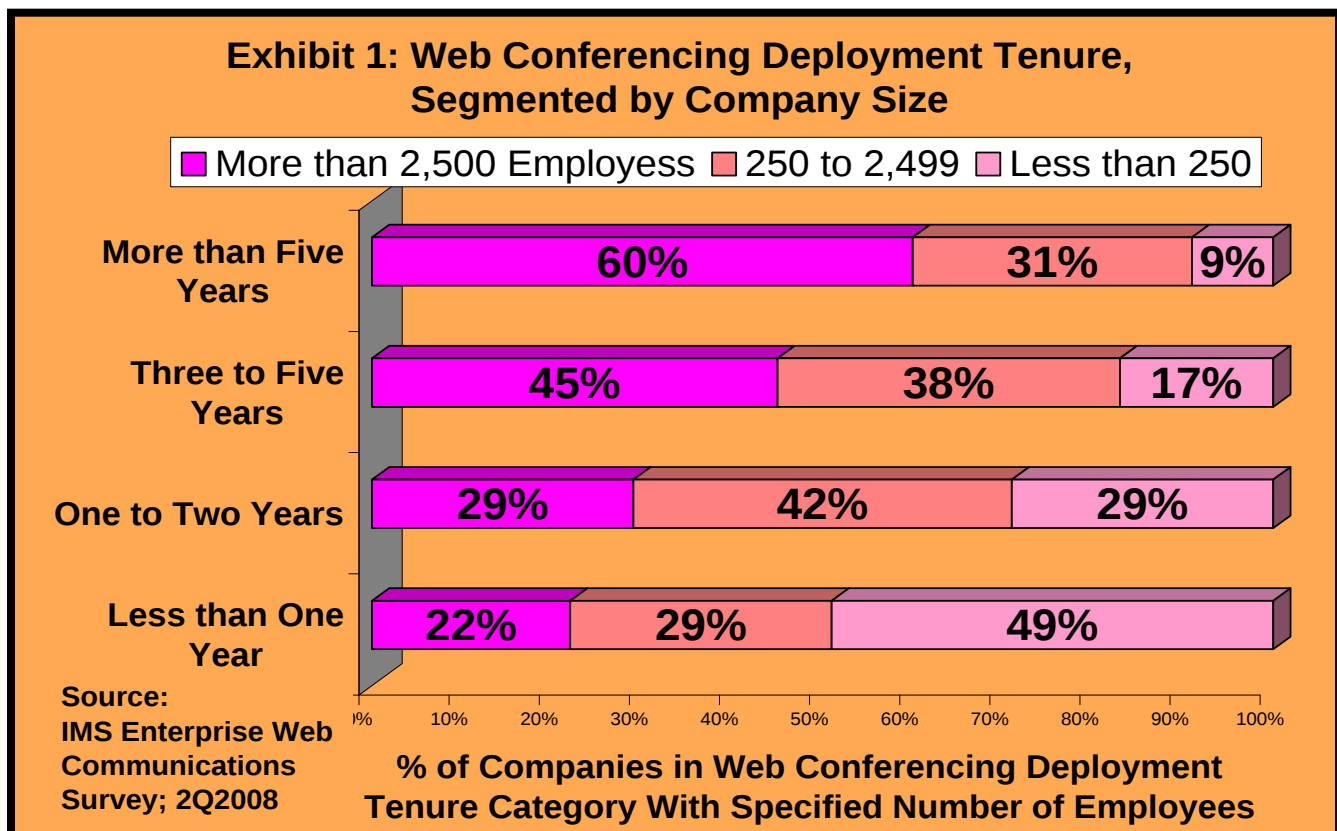
I. Introduction

The world of Web Conferencing is changing right before our eyes. Fundamental ideas in how business users perceive and implement collaboration are going through a meaningful shift that holds significant implications for the adoption of online multimedia in the corporate sector.

Certainly, changes in the collaboration market need to be watched more closely than any other sector of the Web communications world. Web Conferencing serves as a harbinger of sorts, foreshadowing growth patterns in the applications that are gaining traction in the corporate market and the types of business most interested in adopting these technologies for day-to-day use.

And, without a doubt, today's Web Conferencing market is a portrait of change. As illustrated in Exhibit 1, the profile of companies initiating deployment of collaboration tools and services in the past year is far different from that of companies that have historically deployed the technology. Nearly half of companies that have used collaborative technologies for less than a year (49%) have fewer than 250 employees. In contrast, the majority of companies that have deployed Web Conferencing for more than five years employ more than 2,500 workers.

As growth of the collaboration space comes to rely more and more on smaller companies implementing the technology for the first time, the communications priorities of firms that are putting this technology to work are beginning to shift as well.



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As will be discussed at length in this report, interest in collaborative meetings incorporating Webcam video is highest among organizations that are just beginning to implement Web Conferencing technologies. Likewise, companies newer to deploying these collaborative capabilities are more interested in using collaborative technologies for meetings with external constituent groups and for meetings with more than 25 attendees.

These results portend both opportunities and challenges for vendors focused specifically on implementing online multimedia. On one hand, results from Interactive Media Strategies surveys show a growing segment of the companies that use Web Conferencing displaying interests in applications that play to the strengths of communications solutions integrating online audio and video. On the other hand, these shifting demand trends are likely to encourage more aggressive integration of multimedia capabilities into traditionally collaborative solutions, setting the stage for a new breed of competitors in the market for business online multimedia communications solutions.

In this report, Interactive Media Strategies will quantify trends in Web Conferencing deployment and highlight trends that illustrate growing demand in Webcasting-style solutions becoming increasingly evident among companies even as they deploy collaborative capabilities.