lifesize.

2019 Impact of Video Conferencing Report

The rise of video conferencing to the mainstream.

The presence, and sheer simplicity, of video in the consumer mainstream has fundamentally changed video in the workplace. This comprehensive report tests the theories and predictions of industry analysts and thought leaders against data sourced from more than 1,300 business professionals from a wide range of age groups, industries, occupations and income levels to add a layer of statistical significance to the trends impacting video conferencing in the workplace.

The impact of video conferencing on corporate perception

- **55%** believe companies that use video conferencing are more collaborative
- **50%** believe companies that use video conferencing are more innovative
- **41%** believe companies that use video conferencing have more engaged employees
- **31%** believe companies that use video conferencing are more successful

The impact of video conferencing on team collaboration

- **80%** rely on video for 1:1 meetings
- **78%** rely on video for team meetings/stand ups
- **77%** rely on video for large group meetings/company town halls
- **62%** rely on video for meetings with customers/ partners

The impact of video conferencing on the future of work

- **69%** think that video conferencing will be equally or more important than voice assistants
- **63%** think video conferencing will be equally or more important than AR/VR
- **55%** think that video conferencing will be equally or more important than automation/robotics
- **51%** think video conferencing will be equally or more important than AI

4 **Trends** Impacting Video Conferencing Today

Five years ago, cloud-based video conferencing emerged as the biggest industry disruptor since the invention of HD-quality video. Today, video conferencing and communication solution providers have either transitioned to cloud, become a specialty on-premise niche solution or are so new that cloud is the only thing they've ever known. Cloud video conferencing is now the most common way video is deployed in the workplace, capable of delivering higher resolutions and more reliable connections than ever before. So what lies beyond the cloud?

The major trends impacting the current state of the video conferencing and collaboration industry are as follows:

1. The places where work happens have changed

Home office, remote office, coworking space, coffee shop — video has enabled a massive global remote workforce that relies on high quality face-to-face interactions with their teams every single day. In fact, more than 77% of employees have conducted a video call from a laptop or desktop computer and 31% have used a mobile phone, emphasizing the need to meet from anywhere, at any time.

Places people have taken video calls for work —

51% Home office

33% Coworking space

24% Coffee shop or restaurant

21% Bedroom
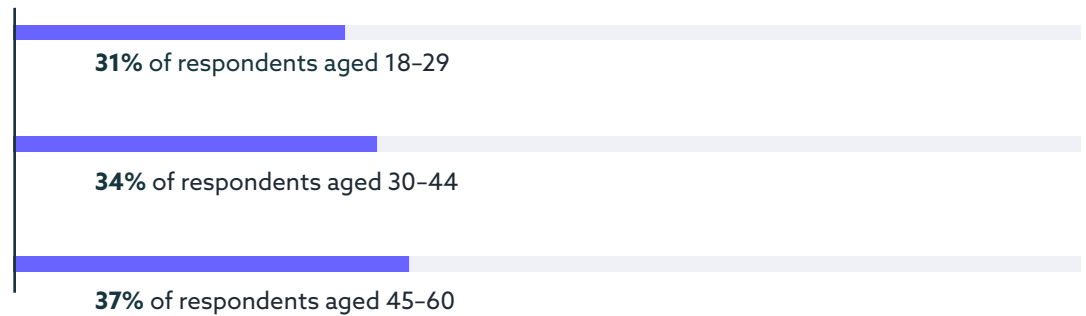
14% Airport

11% While driving

3% Restroom

2. Collaboration rooms have gotten smaller

Companies transitioning to more open office layouts are placing a greater demand on smaller huddle rooms for team collaboration. Many have even started partitioning large conference rooms into multiple huddle rooms to make better use of office real estate. According to recent market trends identified by Frost & Sullivan, huddle rooms are projected to replace almost 70% of all meeting rooms by 2022.

With at least 30% of every age bracket surveyed using conference room equipment to conduct some meetings, the need for technologies like 4K video conferencing systems and wireless meeting room content sharing devices continues to rise. Companies are incorporating video into every meeting space, not just the executive boardrooms of the past.

Percentage of respondent age groups that use conference room equipment to conduct some meetings

31% of respondents aged 18–29

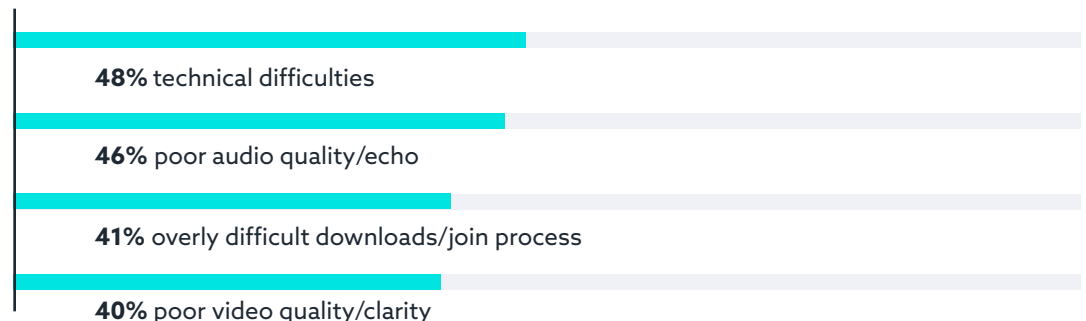**34%** of respondents aged 30–44

37% of respondents aged 45–60

3. Users expect interoperability, flexibility and ease of use

Businesses are made up of consumers who demand that the tools being deployed are compatible with one another and designed in a way that fits within existing workflows. More than half of our survey respondents concluded that companies that use video conferencing are more collaborative, and 51% value video as equally or more important than enterprise chat apps for their day-to-day work.

The tech we use matters with end user solution adoption and overall satisfaction. Requiring meeting guests to download specialized apps or to input long dial strings just to connect on a call detracts from the meeting experience just as much as a poor connection or unreliable audio or video quality.

Top detractors to call experience

48% technical difficulties

46% poor audio quality/echo

41% overly difficult downloads/join process
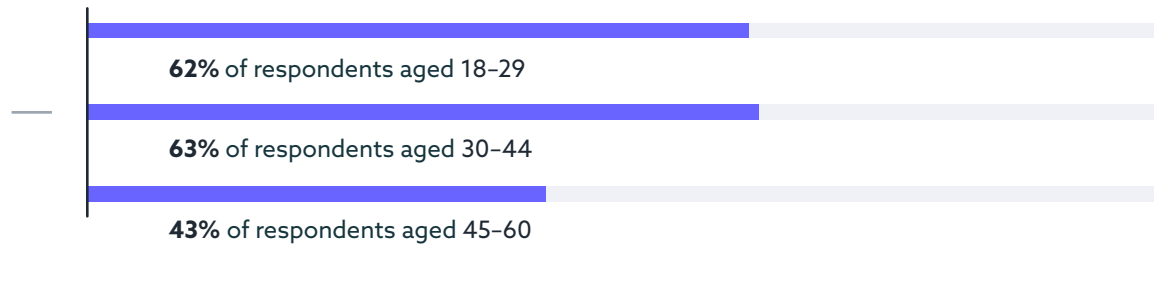
40% poor video quality/clarity
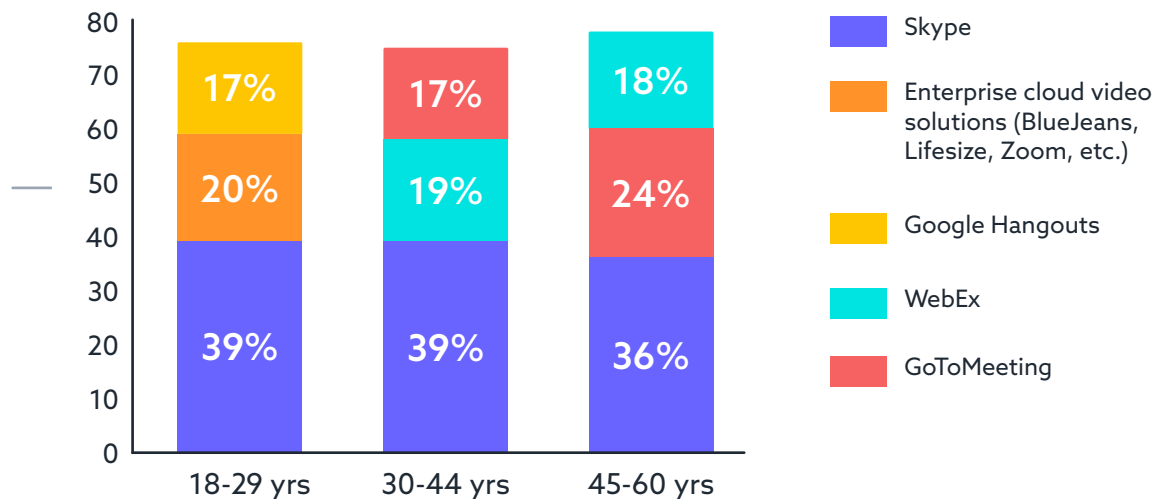
4. The workforce is rapidly changing

Millennials now represent the largest generation in the labor force, with Generation X following close behind. Almost two-thirds of both the 18–29 and 30–44 age brackets use video communication at work — with their first experiences often being via Skype. And while both 30–44 and 45–60 year-olds started with legacy web conferencing providers, Millennials are much more spread across modern enterprise cloud video solutions.

Digital natives and those who have worked their entire careers with internet-connected laptops and mobile phones place a higher value on video conferencing technology. Businesses have started to look for new ways to attract the best talent and are prioritizing video-first collaboration cultures to better fit the agile work styles of the new digital workforce.

Percentage of respondent age groups that have used video communication at work

62% of respondents aged 18–29

63% of respondents aged 30–44

43% of respondents aged 45–60

First experience with video conferencing

	18-29 yrs	30-44 yrs	45-60 yrs
Skype	39%	39%	36%
Enterprise cloud video solutions	20%		
Google Hangouts	17%		
WebEx		19%	18%
GoToMeeting		17%	24%

Legend:
- Skype
- Enterprise cloud video solutions (BlueJeans, Lifesize, Zoom, etc.)
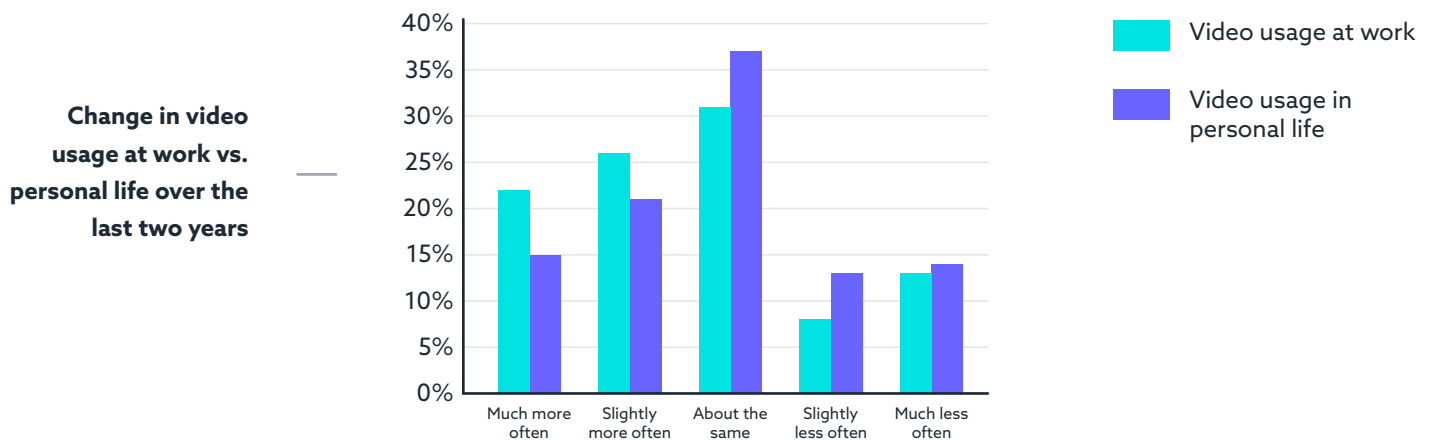- Google Hangouts
- WebEx
- GoToMeeting

The Impact of Video Conferencing on the Future of Work

One of the best things about the Lifesize blend of smart conference room devices with a cloud-based service is being able to harness emerging trends from both the hardware and software worlds without being tied to a full infrastructure refresh. Here are a few technology and business trends defining the future of video in the workplace.

The evolution of video from business advantage to business necessity

Video conferencing will soon no longer be a strategic advantage for companies; it will be a must-have for companies that want to stay relevant. Today, 59% of employees use video communication at work, 45% of whom are video calling on a daily or weekly basis. Almost 50% of respondents cite an increase in video usage at work compared to just two years ago, whereas 27% report that personal use has decreased over the same time span.

Change in video usage at work vs. personal life over the last two years

Legend:
- Video usage at work
- Video usage in personal life

Video conferencing is evolving from a bonus feature or an option to being a requirement for getting business done with remote employees and affiliates. From virtual home tours in real estate to automatic translation on multi-language calls to a widespread telehealth boom — we've only cracked the surface of what is possible in the near term.
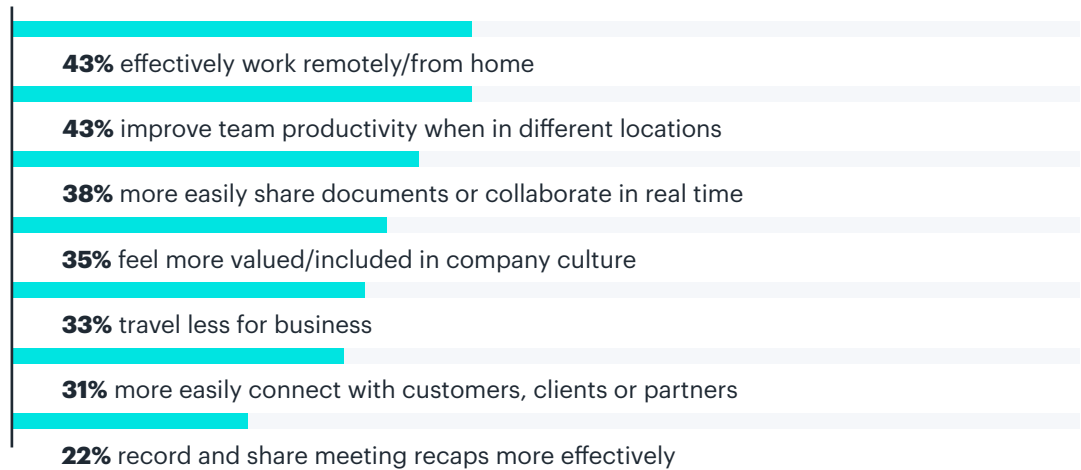
The current state of video communication has already proven to increase productivity, connect with distributed teams, cut travel expenses and simplify the way employees meet with customers, clients and partners, suggesting it's "the next best thing to in-person meetings." As improvements in AI and augmented reality start to enhance the video experience, live translations and facial expression monitoring will make video calls far superior to in-person meetings for many exchanges.

The promotion of productivity through the user-driven experience

The video meeting experience is the combination of video and audio clarity along with the user journey of scheduling, joining and moderating a live call. This year has seen the introduction of the first end-to-end 4K video conference calls as well as huge usability improvements to browser-based video free from downloads or plug-ins. It's the more agile cloud solutions that continue to lead in usability. The days of "Cisco shops" are fading into obscurity as user preferences are continually prioritized over legacy hardware investments and outdated service models.

Better quality and better usability mean a better experience for the people who rely on video for their day-to-day work.

Why people use video conferencing

43% effectively work remotely/from home

43% improve team productivity when in different locations

38% more easily share documents or collaborate in real time

35% feel more valued/included in company culture

33% travel less for business

31% more easily connect with customers, clients or partners

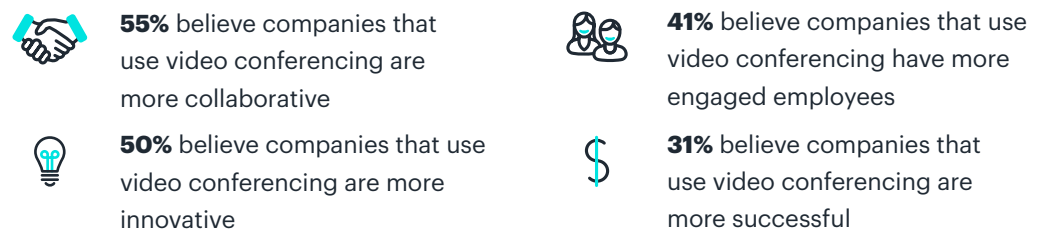**22%** record and share meeting recaps more effectively

Furthermore, this end user-driven culture is leading to a rise in multi-use mini and huddle meeting rooms that teams can use for more than just in-person meetings. Trends in meeting room technology continue to evolve as what was once executive boardroom technology enters standard conference rooms and huddle rooms. Businesses wanting to make the most of their meeting room real estate are creating a video and content sharing experience in every meeting room by investing in low-cost mini conference spaces built for one to two people.

The emergence of video-first culture

Video-first is an organizational communication strategy that places priority on video conferencing meetings, as opposed to audio-only conference calls. Many organizations have shifted to video-first to increase productivity and employee engagement. Face-to-face video-first communications are popular among both startups and established enterprises because of the technology's competitive edge in connecting distributed teams. Almost one-third of survey respondents reported that companies that incorporate video conferencing care more about their company culture, because it shows they care about empowering their employees in the ways they meet — from anywhere on any device.

Perception of companies that use video conferencing

55% believe companies that use video conferencing are more collaborative

41% believe companies that use video conferencing have more engaged employees

50% believe companies that use video conferencing are more innovative

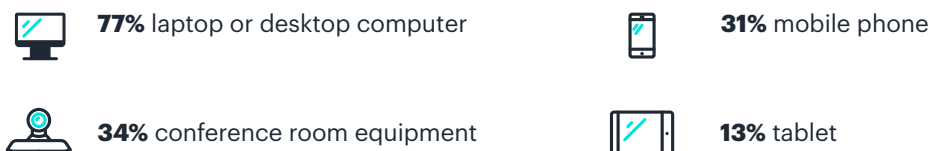**31%** believe companies that use video conferencing are more successful

The balancing of quality and mobility for the next-gen workforce

The sheer accessibility of video conferencing tools around the world combined with the fact that businesses are inviting partners, agencies and clients outside of their networks to more than 50% of their calls has created a new challenge for service providers to make the most of a range of device and network requirements. 38% of the new digital native workforce (18–29 year-olds) has adopted mobile video conferencing, requiring video solution providers to evolve their network architectures to be more efficient on the low end and continuously scale to high-end 4K resolutions.

Of all respondents:

Devices people use to join video calls

77% laptop or desktop computer

34% conference room equipment
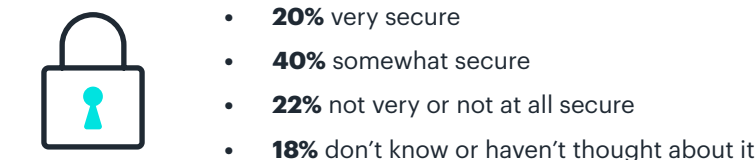
31% mobile phone

13% tablet

In our survey, 24% of respondents reported that being required to download or install extra software or apps is a top detractor from the video meeting experience. The use of WebRTC and web-based applications that natively run in browsers without the need for plug-ins or extensions will reduce barriers to communication, allowing anyone carrying a device with a built-in camera to participate in a video call.

The implication of security on enterprise adoption

In video conferencing, security is often an afterthought. With so much attention paid to protecting personal data, healthcare records, financials and more, it's easy for organizations to forget about the data being transmitted during meetings and among employees, partners and customers inside and outside of the company. According to our survey, a startling 18% of respondents either don't know or haven't thought about video conferencing security.

User perception of video conferencing security

- **20%** very secure
- **40%** somewhat secure
- **22%** not very or not at all secure
- **18%** don't know or haven't thought about it

In many respects, communication services represent the "last mile" in information security. No one wants to think about the what-if scenario of someone intercepting sensitive information or snooping on a video meeting. However, the increasing volume of data breaches and security threats illustrates that organizations should carefully consider whether video communication providers' security presets are adequate for the data being transmitted through their services.

The good news is that most enterprise-level video conferencing providers do offer encryption above and beyond that of a standard audio call. What's clear is that those providers should be far more proactive about communicating security practices and features to help buyers and customers understand what they are getting for their investments and what they should expect based on their organization's security requirements and risk tolerance.
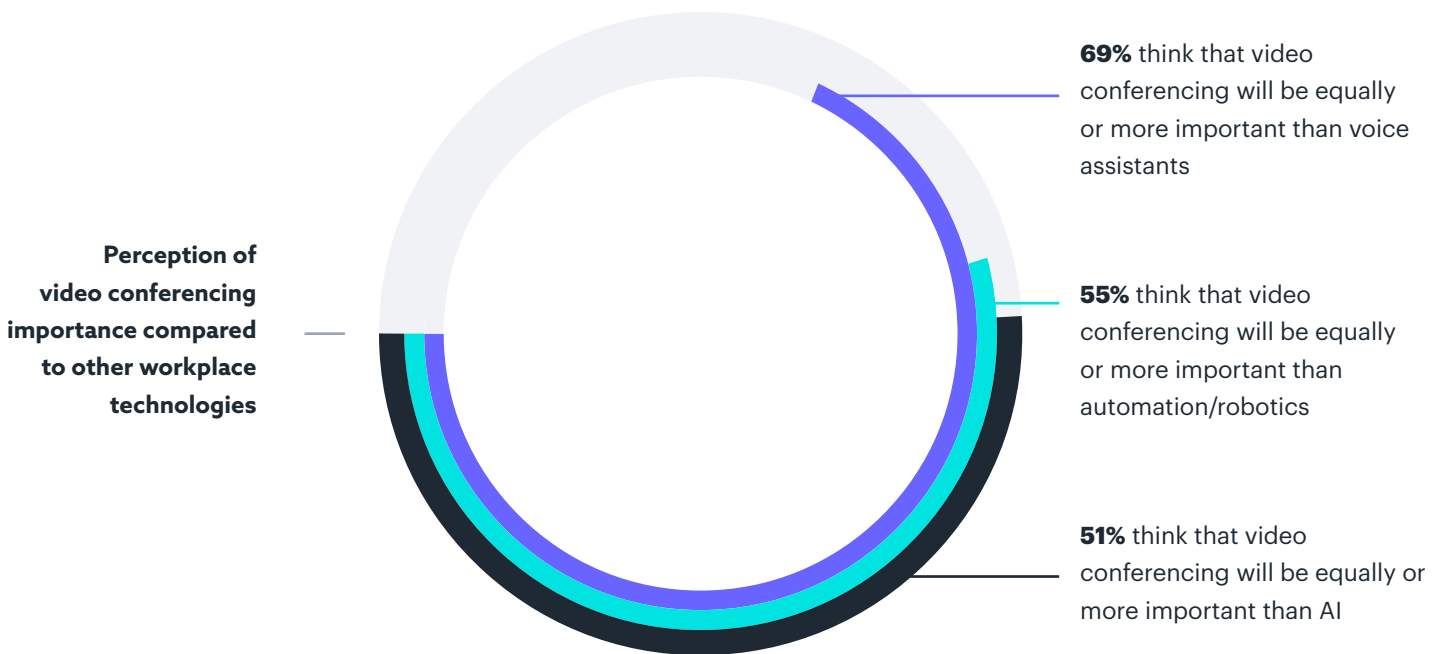
The rise of AI and machine learning

From background noise suppression and echo cancellation to voice and facial recognition, AI and machine learning have already made huge strides in simplifying the way we communicate from an end user perspective. Even system administrators benefit from machine learning as it aids in the monitoring of networks and endpoint connectivity for enhanced reliability and performance.

More than 50% of employees think video conferencing will be equally or more important than AI, automation/robotics and voice assistants for their day-to-day work, but as video continues to incorporate AI and machine learning technologies, new enhancements will be unearthed.

Cloud video conferencing solutions give us access to huge amounts of data about meeting habits. This data, aided by AI and machine learning, could allow us to optimize the effectiveness of meetings. At a basic level, AI could enable us to determine optimal meeting length, the ideal number of participants or the best time of day to hold a meeting to improve productivity. Voice recognition could analyze the content of meetings, compare against other meetings in the same organization and make suggestions regarding connections among people with complementary skills or knowledge.

Perception of video conferencing importance compared to other workplace technologies

69% think that video conferencing will be equally or more important than voice assistants

55% think that video conferencing will be equally or more important than automation/robotics

51% think that video conferencing will be equally or more important than AI

Conclusion

As businesses refine their communication strategies, there are a few things we now know to be true about the impact of video conferencing in 2019.

First, the technology at our fingertips is excellent, and like every other generation, it is driven by the personal tools people use. To that end, user experience will become a primary driver in innovation. In fostering productivity, mobility, quality and usability will be important considerations.

Second, the impact of video on getting work done anytime from anywhere on any device will continue to grow. We've only seen the tip of the iceberg when it comes to video collaboration in new-age workspaces and beyond.

Third, while AI, machine learning and security can sometimes feel like the Wild West of enterprise communication, there's already progress being made toward ensuring that they are incorporated into future video solutions for maximum effect. It's up to providers to educate customers and users on the implications and potential impact of those forces of innovation.

And finally, video conferencing is here to stay as a key part of video-first workplace cultures, connecting distributed teams and improving employees' day-to-day workflows. Video has been a business advantage up to this point, but soon it will become an essential component of business success.

Lifesize.
Work together.™

Introducing the world's first global 4K video conferencing solution

In an industry satisfied with settling for "good enough," we are pursuing a different path. Rated best in class for video, audio and content-sharing clarity, we help your teams present your business in the best light.

Video communication purpose-built for business

Host free and instant video calls with your team right from your phone or browser. Our video conferencing app works when and where you work. No downloads or sign-ups required — just share the link and go.

Video conferencing solutions to fit any space

From all-hands spaces and boardrooms to small huddle rooms, our cloud-based solutions bring 4K video conferencing and wireless presentation to all your meeting spaces.

Interoperable to play well with others

Upgrading to the world's best video conferencing equipment doesn't have to mean replacing everything you currently use. Lifesize works with Microsoft Teams, Skype for Business, Outlook®, Slack ®, Cisco ®, Polycom® and others.

Tens of thousands of organizations around the world trust Lifesize

Get your team started on Lifesize today

www.lifesize.com/demo

About Lifesize

Lifesize combines best-in-class, cloud-based video conferencing services with integrated equipment that sets a new standard for workplace communication and productivity on a global scale. Recognized as Frost & Sullivan's Cloud Video Conferencing Vendor of the Year, Lifesize leads the industry in customer satisfaction with the world's first 4K video conferencing solution and 4K service architecture, designed and engineered from its headquarters in Austin, TX. To see why organizations like Yelp, Salvation Army, Yale University and NASA rely on Lifesize for their mission-critical team communication, visit www.lifesize.com or follow the company @Lifesize.

About the Survey

Lifesize commissioned SurveyMonkey to conduct a June 2019 survey detailing video conferencing usage and perceptions by business professionals across the United States. A total of 1,364 responses were collected from a representative sample of industries, age groups and regions.

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