



**InFlow  
Analysis**

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RESEARCH REPORT

# The InFlow Analysis Market Compass for Webinar Providers, 2017: Shifting to Conversational Experiences



**David Mario Smith**

Founder and Principal Analyst

**Graphic Designer: Aldin Smith**

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## The InFlow Analysis Market Compass for Webinar Providers, 2017: Shifting to Conversational Experiences



Focus Webinars on  
conversational  
experiences

The Webinar market is continuing to evolve with a diverse set of providers emerging from very different disciplines. There are a mix of both large and small providers. Marketing, Corporate Communications and Enterprise planners from IT and all lines of business that are responsible for infrastructure and producing webinars, have to perform the proper due diligence when navigating the vendor landscape and making the right procurement decisions for products and services. Also, the focus has to be on fostering conversational experiences and true engagement.

### Key Takeaways

- The webinar space continues to undergo heavy consolidation, while simultaneously witnessing a plethora of new providers with origins in different and adjacent markets emerge.
- When making webinar procurement decisions, business planners have to map critical capabilities to the right use cases to avoid the pitfalls of focusing too much on features.
- Knowing your target audience will help guide technology decisions, especially around scale and bandwidth needs. Also, focus on conversational experiences with your audience.
- While webinar decisions tend to be departmental and team based mostly, take care to ensure broader integration with business applications such as marketing automation and Customer Relationship Management (CRM) systems.
- Reporting and analytics is a critical component and will provide useful data that can guide engagement activities after the webinar event. AI and machine learning are becoming integral parts of this phase for accurate insights.
- Plan carefully for webinars and understand beforehand requirements for professional services and live support during larger and more critical events.



Map critical  
capabilities to the  
right use cases

**The Webinar Market Compass**

Figure 1. The InFlow Analysis Market Compass for Webinar Providers



Source: InFlow Analysis (2017)



## Market Definition

The webinar market is generally characterized by a variety of offerings, products and services, predominantly sold via the Software as a Service (SaaS) model, that facilitate real-time, one or few-to-many meeting types, which can include, audio, video and content sharing. Webinar offerings support live and also on-demand delivery of recorded events. Some offerings support a hybrid approach with pre-recorded content for live delivery and Q&A. Typical use cases include marketing communications, sales communications, educational or training (virtual classroom) and internal corporate communications among others.

A key feature of webinars is interactivity with support for real-time interactions between presenters and participants, usually in the form of Q&A, polls and other types of feedback. Some offerings provide additional features, like Adobe Connect, which support breakout rooms for deeper interactions during webinars. Some webinar providers also support webcasting, which was traditionally a one-way transmission from presenter to audience participants. Also, some integrate with Facebook Live to live stream interactive webinars and webcasts.

Webinar products fall under the uber Web Conferencing or Meeting Solutions market, which also includes webcasts and collaborative web meetings. We do find that enterprise buyers often confuse webinars and webcasts and do use the terms interchangeably. With interactive webcast offerings emerging, the line between webcasts and webinars continue to blur.



## Market Analysis

Since our report last year, the Webinar market has gone through waves of fluctuation with consolidation and technology convergence happening simultaneously. This movement continues to keep pace with the overall digital workplace space and specifically the collaboration market. Interestingly, we are continuing to see Enterprise Video Platform providers offer webcasting capabilities. These offerings can also be utilized for some webinar needs. Many of the players in the enterprise video platforms space, hail from the focused video content management domain and do offer highly scalable delivery of live video webcasts. These platforms play the role of an enterprise YouTube, which marketers can leverage to deliver pre-recorded multimedia content. Continuing with the enterprise YouTube metaphor, they can also convert recorded

content from traditional webinar platforms and make them available for on-demand delivery from their platforms. The ability to intelligently search video content is critical here.

Representative providers in this space include Kaltura, Kollektive, MediaPlatform, Panopto, Sonic Foundry, Qumu, vBrick, uStudio and Vidyard.

Bear in mind, many traditional webinar providers also support larger webcasts as well. The diversity in the market results in a tremendous amount of confusion for buyers, who are evaluating live webcasting solutions and comparing them to web conferencing and traditional webinar offerings. The decision comes down to what your core criteria are. We often advise that scale be an important criterion here, as typical webcasts tend towards larger audiences.

However, as technology convergence increases, offerings will blur lines, thus leading enterprise buyers to seriously look at the level and type of interactivity required for their target audience. It comes down to the overall experience you want to provide attendees. The focus has to be on the attendees' experience and how they want to consume or participate in webinar events.

### **The Shift to Conversational Experiences**

Increasingly, businesses are recognizing the need to become more conversational internally and externally with customers. This is the driver for marketing and sales efforts. Webinars are useful for helping to create conversational experiences. These conversations have to continue after the event to foster true engagement.

### **Understanding the Costs and Services Needed**

Pricing is one of the most important aspects when doing due diligence in selecting webinar providers. Most services are delivered via the cloud. In selecting providers, think about the audio portion and the requirements for a telecom bridge if needed. The audio bridge can make costs higher, especially with large audiences. However, the current trend is moving toward IP-based configurations predominantly.

For business planners doing one off events, we typically see per event pricing and sometimes some flavor of billing per minute. That is an expensive option if you plan on doing multiple events. Subscription-based pricing is becoming the norm for consistent users who are planning multiple webinar events per year or quarter. This leads to more of a long-term relationship with discounted pricing. This also allows multiple departments in the enterprise to access webinar services from a single contractual relationship. The norm now, is for different departments to procure their own services in silo, causing overlaps and wastes in spending.

A bidirectional relationship with the webinar provider is critical. While providers are moving to more self-service webinar platform options, larger scale events may require professional services to manage them effectively. Ensure the webinar provider can provide professional services and also live support during critical webinars. The provider serves as a partner in this relationship.



### **Webinar Target Audience**

There are generally two main target audiences and corresponding use cases for Webinars, which are internal and external. With business strategies being reimagined and directed towards the customer's experience, journey and employee engagement, webinars offer a wealth of benefits for internal and external communications. Marketing professionals understand the positive impact webinars have on inbound marketing initiatives to engage customers and prospects for lead generation. Webinars remain a critical tool for engagement for all audiences.

### **Internal Audience**

- Town Hall Meetings
- Corporate Communications
- Internal Sales and Marketing Communications
- Training
  - Virtual Classroom
  - New Hire Onboarding

### **External Audience**

- Marketing Event - New Product Launch
- Marketing Event - Educational
- Sales Product Demo
- Training (Virtual Classroom)
- Live Workshop
- Investor Relations Calls

### **Webinar Features and Functionality**

With each target audience and use case, enterprises have to understand the critical capabilities, in regard to features and functionality that will be needed. Whether the use case is internal or external, we rate providers and products on the following critical features and capabilities:

**Table 1. General Features**

<b>General Features</b>	<b>Description</b>
<b>Audio</b>	The webinar product can be integrated with a public switched telephone network (PSTN) for audio, where participants can dial into an audio conferencing bridge. The Webinar producers or presenters can control participant phone connections and mute lines. The webinar product can also support voice over Internet Protocol (VoIP) for audio, which can reduce or limit the need for telephone-based audio bridges. The built-in PC or mobile device's speaker and microphone capabilities with a headset can be used to speak and listen.
<b>Video</b>	Most offerings support desktop or mobile device enabled video conferencing or streaming. Some offerings can initiate webinars with video from a mobile device.
<b>Screen Sharing</b>	Webinar event producers and presenters can share their desktop or mobile device screen.
<b>Application Sharing</b>	Presenters can share specific applications such as PowerPoint or Keynote.
<b>Recording</b>	Each webinar event can be recorded, archived and be replayed on demand at a later date. Additional costs may be required for storing recordings.

Source: InFlow Analysis (2017)

**Table 2. Interactivity**

<b>Interactivity Type</b>	<b>Description</b>
<b>Chat</b>	Real-time text chat between presenters or between audience participants and presenters.
<b>Polling</b>	Real-time short surveys of participants during webinar.
<b>Q&amp;A</b>	The ability for participants to ask the presenter questions. Typically, there is a moderator that monitors the Q&A queue during the webinar.
<b>Breakout Rooms</b>	Some products support topic based breakout rooms and also breakout areas for presenters to huddle.

Source: InFlow Analysis (2017)

**Table 3. Content Sharing**

<b>Content Sharing Type</b>	<b>Description</b>
<b>File Sharing</b>	The ability to exchange files with the audience during the webinar.
<b>Shared Whiteboard</b>	Presenters can perform real-time annotation of their content via a whiteboard functionality.
<b>Rich Media</b>	Presenters can embed and share rich media files such as video and images during the webinar.

Source: InFlow Analysis (2017)

**Table 4. Platform**

<b>Platform</b>	<b>Description</b>
<b>Mobile Support</b>	Supports a native mobile app or website where participants can access webinar content, audio and video from mobile devices.
<b>Performance</b>	Service is reliable with consistent uptime and availability.
<b>Bandwidth</b>	Supports adaptive bandwidth management to ensure peak performance.
<b>Scalability</b>	Product can scale as enterprise needs require larger audiences.
<b>Reporting and Analytics</b>	Access to complete data about webinar sessions, including attendees, surveys and sales-ready leads etc. This is necessary for post-event lead tracking and follow up. Planners need to tie webinars to marketing and sales goals. Artificial Intelligence (AI) will start to play a role here for understanding engagement.
<b>Security</b>	Built-in end to end encryption with password protection.
<b>Integrations</b>	Integrating with CRM, marketing automation, and social media tools and platforms such as Facebook and Twitter. Some vendors have the potential of integrating with a social networking platform so that marketing professionals can continue the conversation with attendees after the webinar. This could be useful for forming topic based communities to engage attendees well after the webinar event.
<b>Customized Branding</b>	Support for individual enterprise branding and a landing page for registration and post webinar follow up.
<b>e-Commerce</b>	The ability to charge for and gain revenue from live and on demand webinar events. We see this frequently used for training events or courses.

Source: InFlow Analysis (2017)

## Webinar Best Practices

Every webinar has a flow that should be adhered to, in order to guarantee a successful event. It goes without saying, but proper planning is critical. You need at least 2 months of lead time for advanced planning to ensure effective preparation and promotion of your webinar event. With the relatively fast paced nature of most business in the current digital environment, I would recommend no shorter than a month to prepare for an effective webinar. If there isn't an audience, the webinar is a failure. Good planning, preparation and understanding of who your target audience is will be useful in creating compelling content that will be of interest and lead to better attendance.

Webinar producers and planners also have to focus on engagement with the audience, including the no-shows, after the webinar. This includes making the webinar available for on

demand replay and understanding the webinar reporting and analytics data, so the right decisions are made based on insights. Measure the ROI of the webinar investment based on the data. Let the insights from the data analysis guide the follow up sales and marketing activities. The idea is to focus on the user's experience and to continue the conversation well after the event has ended. The event is just one part of the journey. Planners have to intimately understand the customer journey here throughout pre-planning and post webinar event follow up.

In putting this all together, think of the flow of the webinar as an entire workflow, with each part of the process requiring certain features and capabilities from the respective products being evaluated. Break the webinar lifecycle out into the stages of the workflow to make it easier for matching the capabilities of each product based on core requirements. (see Figure 2).

Figure 2: The Webinar Workflow

Pre-Event	Live Event	Post Event
<ul style="list-style-type: none"> <li>• <b>Scheduling</b> <ul style="list-style-type: none"> <li>• Focus on ease of use in scheduling</li> </ul> </li> <li>• <b>Registration</b> <ul style="list-style-type: none"> <li>• Easy registration for attendees</li> <li>• Registration landing page</li> <li>• Integration with marketing automation/CRM tools</li> <li>• Charging fees at registration and payments processing</li> </ul> </li> <li>• <b>Attendee Notifications</b> <ul style="list-style-type: none"> <li>• Email notifications</li> <li>• Customize and brand notifications</li> <li>• Ability to RSVP</li> <li>• Ability to cancel</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• <b>Producers</b> <ul style="list-style-type: none"> <li>• Multiple Presenters</li> <li>• Presenters lobby/breakout</li> <li>• Screen, app and file Sharing</li> <li>• Audio/Video</li> <li>• Interactivity: Testing, Surveys/Polling, Chat</li> <li>• Live Support</li> </ul> </li> <li>• <b>Attendees</b> <ul style="list-style-type: none"> <li>• Flexible join options               <ul style="list-style-type: none"> <li>• Phone/VoIP</li> <li>• Desktop/Mobile Device</li> </ul> </li> <li>• Interactivity               <ul style="list-style-type: none"> <li>• Q&amp;A via chat, audio, video</li> <li>• Social interaction with other attendees</li> </ul> </li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• <b>Producers</b> <ul style="list-style-type: none"> <li>• Event Recording/Replay</li> <li>• Analytics and Reporting</li> <li>• Lead generation with integration into CRM and marketing automation tools</li> <li>• Social Space to foster participant community of interest for ongoing engagement</li> </ul> </li> <li>• <b>Attendees</b> <ul style="list-style-type: none"> <li>• Event replay</li> <li>• Certifications/Credits</li> <li>• Community of interest to continue conversation</li> </ul> </li> </ul>

Source: InFlow Analysis (2017)

## Inclusion Criteria

The Market Compass for Webinar Providers, 2017, will help clients navigate the webinar market and come to better decisions about providers and products to evaluate and ultimately procure. The following is the market inclusion criteria we used for the Webinar Market Compass:

- Webinar Provider must develop and market their own product or service.
- Provider must have a majority of the common features outlined in the Features and Functionality section.
- Provider must market the product or service standalone, which can also be part of a suite.

- Product has to support at least 50 or more participants.

## How to Use the InFlow Analysis Webinar Market Compass

A Compass is a great metaphor for life and business. While a compass doesn't specifically tell you what direction you should go in per se, it does tell you what direction you are facing, and lays out all of the other directions or options based on where you are. Your requirements, needs and goals will determine which direction you should go in. The compass will help you get there by pointing the way.

The InFlow Analysis Webinar Market Compass is a market and buyers guide, that is based on primary and secondary market research with direct feedback from enterprise users and customers. Overall, from our extensive research, the core requirements for business users and planners evaluating webinar software and services are scale, performance and price. Basically, the service just has to work to reach the intended audience and be reasonably priced. Flexible pricing options are also desirable.

Software technology markets can be cumbersome to navigate. It is easy to get lost in the technology wilderness or in the busy technology metropolis of countless vendors and providers. What's needed is a trusty compass that will ensure navigation is no longer a problem. The InFlow Analysis Market Compass evaluation tool and methodology will allow enterprise planners to accurately find their bearings and their "true north," around product and vendor selection.

Use this Webinar Compass as a guide to help determine who the key products and vendors are providing webinar and web conferencing services based on your core needs. This is a market and buyer's guide combined to bring clarity to the market and vendor offerings. Not all enterprises or vendors are alike. Understand your core needs and requirements and map those to what services vendors are offering. Also, request clarity and guidance on vendors' roadmaps to ensure future alignment and compatibility with enterprise vision and requirements.

Utilize the Webinar Workflow in Figure 2, to understand the capabilities needed at each particular phase of the process. Place webinar providers on your shortlist that meet the requirements for capabilities at each phase. Also weigh the expertise of each provider based on their full understanding of the webinar workflow. A major capability of strong providers will be the level of services and expertise they can provide throughout the entire webinar workflow. Good Webinar providers have to be an integral part of the webinar production and planning team.



## Market Evaluation Criteria

### Strategy/Execution

We evaluate several areas under strategy and execution. It is not enough just to have a good market strategy; you also have to execute that strategy. Execution is evidenced in measureable results from marketing and sales efforts. Focusing on customer experience is critical. Mindshare, awareness, sales execution and market presence are evidence of good overall execution.

**Table 5. Strategy/Execution Criteria**

<b>Market Evaluation Criteria</b>	<b>Description</b>
<b>Market Understanding</b>	Having deep understanding of buyers needs and converting that into offerings with adjacent services to meet those needs. This is about having the right mechanisms in place to listen to and understand buyers' needs and requirements.
<b>Marketing Strategy and Execution</b>	<p>Involves the clear, consistent messages and messaging about the company and products through multiple channels of interaction. A customer-centric program is the centerpiece of the marketing strategy. It has to be focused on building immersive experiences, with customer participation and customer advocacy.</p> <p>Execution is the clear results of an effective marketing strategy, evidenced by market influence, awareness, and customer advocacy. It involves targeted campaigns and programs that drive better digital experiences across multiple channels and ultimately sales activities.</p>
<b>Sales Execution</b>	Executing on the Strategy for the right measure of direct and indirect sales that is in synergy with marketing for a healthy ecosystem, with deep market reach and expert professional services. A healthy partner and affiliate ecosystem is critical to sales execution. This also includes pricing strategy, where we evaluate if the product is priced and packaged competitively in comparison to the market.
<b>Company Health</b>	The overall health of a company is crucial for understanding the likelihood it would continue investing in its products and services. This involves the analysis of a company's financial health, organizational structure and support personnel around the product and services.

Source: InFlow Analysis (2017)

### Product/Technology

We evaluate the development of the product and service, including the technology framework itself. The product has to meet the current needs of the market, with innovation to foresee and anticipate future customer needs.

**Table 6. Product/Technology Criteria**

Market Evaluation Criteria	Description
<b>Product/Service</b>	The product or service itself that delivers on supporting the needs of the market. This includes the critical product capabilities we have defined that match to market use cases.
<b>Product Vision</b>	The ability to anticipate future market changes and customer requirements with forward thinking product innovation.
<b>Customer Satisfaction/Experience</b>	The consistent positive feedback from customers regarding their experience and satisfaction with products and services. This involves easy access to services and support globally.

Source: InFlow Analysis (2017)



## The InFlow Analysis Market Compass Sector Profiles

**Leaders:** Leaders provide webinar products that are consistently rated highly by users, have significant market share, scale and offer global support services. Based on market and customer understanding, Leaders have developed deep expertise and can provide a high degree of professional services. They have executed on their market and product strategy to significant penetration and customer satisfaction. Leaders also influence market direction. Current customers should continue

investments, while potential customers should place them as a strong and strategic choice.

**Market Accelerators:** Market Accelerators provide products that are rated well by users with highly positive customer satisfaction feedback. While they may be behind Leaders in certain features, they are strong performers and should be considered for both strategic and tactical investments. Market Accelerators are typically disruptors with a mix of strong product and technology vision with increasing market awareness. Customers should continue their current investments. Potential customers should consider them a viable choice but be judicious in matching their requirements to features offered. In Pick-up basketball vernacular, Market Accelerators “Got Next.” They are on the cusp of market leadership.

**Challengers:** Challengers have achieved some market presence, but are behind in market execution compared to leaders and Market Accelerators. Their products may lack certain features that are highly required by some parts

of the market, but may excel in others or come in at attractive price points. However, while Challengers maybe inconsistent in overall execution due to limitations in strategy or are new in the market, they are on the cusp of being Market Accelerators with the necessary adjustments in focus. Customers should continue their investment, but be aware of any changes in status. Potential customers should look at the evolution of these providers and make buying decisions based on future direction and maturity.

**Niche Competitors:** Niche Competitors are more specialized and should be considered for more tactical investments. They are behind in market penetration and presence, but do receive positive ratings from customers. While viability will be a concern for larger enterprise wide purchases, price vs features will be attractive to departmental and small team or project based buying centers.



## Webinar Provider Profiles

### Leaders

#### Adobe

In the professional marketing domain, Adobe is a well-known brand among marketers. Its Adobe Connect offering has been a staple in delivering meeting solutions to both public and private sector organizations. As a leader in this space, Adobe Connect pretty much supports the broad range of meeting use cases, including webinars and training scenarios. Users herald the stability and the ability to customize Adobe Connect as key factors in procurement. In fact, Adobe Connect is one of the more customizable solutions, with the ability to extend functionality with what Adobe calls pods. It elevates Adobe Connect as a platform with a rich ecosystem of developers.

The Event Manager tool, enabled by Adobe Experience Manager, and the robust reporting, enabled by Adobe Analytics, contribute significantly to the strength of Adobe Connect for marketing professionals looking to improve engagement and the customer's experience. I believe this is the real strength of Adobe Connect for marketing professionals looking to improve engagement and the customer's experience.

**BlueJeans**

BlueJeans is a key player in the video conferencing space. It has been one of the major disruptors to traditional providers and the market as a whole. Its video cloud platform supports HD video, HD content sharing and recording, for live webinar events use cases. With its Primetime service, which supports large scale interactive events such as all-hands and town hall meetings, BlueJeans has become a major player in the webinar market. A huge focus for BlueJeans Primetime has been making interactive webinars and events with video and audio the norm.

The BlueJeans Primetime platform supports up to 100 interactive participants, scales to thousands of viewers and can potentially reach millions with its Facebook Live integration. The theme for Primetime is focused on a higher level of interactivity during events. This is very useful for events with multiple presenters or panelists, who need to switch to become active presenter seamlessly. Viewers can also switch to become active presenters as well during events.

**Cisco**

Cisco WebEx has been one of, if not the most recognized brand in web conferencing and meeting solutions for over 20 years. It's specific webinar offering, WebEx Event Center, is very well recognized and supports up to 3,000 attendees. The companion offering is Cisco's WebEx Training Center for virtual classroom and distance learning use cases.

Event Center supports customization of the enrollment process, with the ability to add your own branding to invitations and your registration site, e-commerce to generate revenue from events and recordings, post event lead source tracking to identify the most effective attendance

sources, and automatic emails and survey follow up with attendees. With its ecosystem of partners, you can integrate into CRM systems like Eloqua, Salesforce, Act-On, Marketo, and Constant Contact. Event Center supports high quality video, but does not yet support HD video as WebEx Meeting Center and Training Center modules do. Video is currently limited to 360p. Event Center does support all the phases of the webinar workflow.

**LogMeIn (GoToWebinar)**

LogMeIn announced in 2016, its merger with the Citrix GoTo business which included GoToWebinar and the entire GoTo family of services. The deal was completed January 31, 2017. This merged the entire GoTo family with LogMeIn's join.me, a popular meeting solution offering in its own right.

The GoToWebinar offering is well known and has gained great traction in the webinar market. GoToWebinar supports up to 1,000 attendees and includes desktop video conferencing capability. There is also a GoToWebcast module that supports up to 5,000 attendees for larger broadcast events.

GoToWebinar comes in tiered plans of 100, 500 and 1,000 participants respectively. LogMeIn has recently launched GoToStage, an on-demand video platform that allows users to host and curate content to ultimately drive new leads. This is aimed at marketers and content creators.

While LogMeIn's join.me offering is a popular meeting solution for many use cases, we believe GoToWebinar is the primary webinar offering. Join.me supports up to 250 participants, unlimited audio, but is limited in some of the features marketing professionals require for webinars such as advanced reporting

and analytics. However, we are still seeing its usage for smaller webinar related use cases. With a now larger portfolio of products, we believe LogMeIn should provide official guidance regarding best scenarios where GoToWebinar is best suited versus join.me.

## **ON24**

ON24 has a strong history as a large virtual events and webinar provider. Its focus in recent years has shifted towards its strongest target audience of marketing professionals. The ON24 platform scales up to thousands of attendees with highly interactive webinars. ON24 also offers a self-service offering called Webcast Elite, which allows webinar producers to produce their own full-length events from beginning to end. This option has become very popular with digital marketing and training professionals who desire more hands-on control to shape the user experience. Webcast Elite is available as an annual subscription service.

Because of its expertise in this space, ON24 also offers professional services for event producers who need to do larger virtual events, where ON24 manages and hosts the entire event. This can include a full production studio and staff with presentation creation and services for managing ticket sales. ON24 will handle the storage and on demand access to events. Event producers will have a branded portal that integrates with digital marketing tools and social media for event promotion.

## **ReadyTalk (A PGI Company)**

ReadyTalk is a known brand in the service provider space for conferencing and meetings solutions services. It was acquired by PGI, in February of 2017. The ReadyTalk webinar offering supports up to 3,000 attendees, who

can gain access easily without needing to download software. For webinar planners, there are customized branding capabilities, recording, integrated audio and integration into business applications and platforms, such as Salesforce, Marketo and a majority of CRM and marketing automation platforms respectively. Integration into critical business applications and processes speaks to support for pre, during and post webinar management, which covers the entire webinar workflow.

For marketing professionals, the ReadyTalk webinar service provides event promotion tools for social media platforms such as Twitter, LinkedIn and Facebook. The service includes broadcast video webcasts and simulive events, which allows producers to replay recorded webinars with live Q&A and interactivity. Webinar planners and producers also get post-webinar reporting capabilities.

## **Zoom**

Zoom has seen accelerated growth and increased mindshare in the past year since our last Webinar Compass report. It has disrupted the webinar market as it has already done in the broader video conferencing and online collaborative meetings solutions spaces respectively. Zoom's Video Webinars offering allows event planners to scale webinars for thousands of attendees. It supports 50 interactive video participants that can be appropriated as panels or panelists during the webinar event that can be scaled up to 10,000 attendees. It supports registration for event producers with reporting and analytics. It's new automated intelligent transcription service, uses AI for automating meeting transcripts and makes them searchable. It converts speech to text and identifies each associated speaker.

Zoom Video Webinars continues to support HD Video and audio conferencing. The offering comes in tiered plans of 100, 500, 1,000, 3,000, 5,000 and 10,000 viewers respectively. Integration is supported with CRM and marketing automation platforms to effectively handle event promotion, lead generation and other post-webinar follow up activities to support engagement as part of the webinar workflow.

## Market Accelerators

### PGi

PGi has a full suite of conferencing and meeting services. It has now refocused with better messaging iMeetLive, as its premiere offering for large events, webinars and webcasts with scaling over 10,000 participants. It requires no software download for attendees. This is a well needed focus as the webinar market heats up. It has essentially deemphasized focus on its smaller scale GlobalMeet webinar offering.

With the acquisition of ReadyTalk and its webinar offering, PGI should continue to provide guidance on best scenarios for each. The clearest distinction, would be to use iMeetLive for larger events and webcasts that will also require a higher level of professional and premium services.

### West

West Corporation was recently acquired in October of 2017, by Apollo Global Management for about \$2 billion. West's Webcast Pro is its premiere full-scale webinar offering, along with Webcast Essentials, which is a self-service module, where users have access to all the features, metrics, branding and registration controls to schedule and host professional webinars on the fly.

With the Webcast Pro offering, webinar planners and producers get a fully customizable platform for their own branding, engagement analytics and dedicated event management for pre, during and post event phases of the webinar workflow. There is integration with CRM and Learning Management Systems (LMS) such as Eloqua, Marketo and Sum Total respectively.

## Challengers

### BroadSoft

Broadsoft's webinar capabilities come from its acquisition of iLinc in 2011. In October of 2017, Cisco announced its own acquisition of Broadsoft for \$1.9B. iLinc's iLinc Suite, includes the modules iLinc for Meetings, iLinc for Learning, iLinc for Support and iLinc for Webinars. The Webinars module supports VoIP, integrated audio bridge and scales to 1,000 participants. There are integrations with Salesforce CRM and social networking platforms such as Facebook and Twitter. iLinc needs to focus on more integrations via Application Programming Interfaces (APIs) with other business applications.

For organizations that want to outsource the webinar producer role for critical events, iLinc's event management services will handle the full pre, to post event management lifecycle. While iLinc for Webinars is available on mobile web browsers, there aren't any native mobile apps. With Cisco's acquisition of Broadsoft, it is unclear what the future holds for the iLinc webinar offering, as it competes and overlaps with WebEx Event Center.

## Fuze

Fuze, which was acquired by ThinkingPhones in 2015, has steadily been emerging in the broader unified communications and collaboration market. The new combined entity also announced a branding and name change to Fuze along with announcing a \$112M round of funding, led by Summit Partners, with help from current investors Bessemer Venture Partners and Technology Crossover Ventures.

As a cloud video conferencing and collaboration provider, Fuze has become a viable lower cost alternative to the likes of Cisco and Polycom. It's webinar capabilities in what it calls Webinar mode, is available to Fuze Premium account customers, with good support for mobile devices. Webinars max at 250 participants and supports custom branding for registration landing pages, audio, video, recording and multiple presenters. There are some limitations regarding specific integrations into CRM and marketing automation platforms for sales and marketing goals. However, reporting is supported for registrants and attendees, which can be downloaded in .CSV format.

## Niche Competitors

### Onstream Media

The Onstream Webinars platform supports a zero download browser based service for both hosts and participants. The service supports a variety of webinar use cases such as corporate

communications, training, marketing communications and sales presentations. Customers can procure the service via a monthly subscription for self-service scenarios and per event for larger webinars where professional services and advanced support is required.

While the service offers open APIs for integrations, it still lacks native integrations into CRM and other business applications. Users also report limitations regarding e-commerce payments for webinars, which require registration on a different site. Onstream also offers a dedicated webcasting service for broadcasting virtual events up to several thousand attendees.

### Webinato

The Webinato webinar offering is not very well known, even though it's been around for over 10 years. It does provide a good set of capabilities and supports multiple use cases from internal to external marketing communications. Its Webinar Recast features allows replays of recorded events with all interactive capabilities intact.

The platform does provide APIs for integrations with business applications such as CRM platforms. The platform also allows webinar producers to provide a payments option to collect fees at attendee registration. The mobile app supports attendee viewing but the ability for webinar producers to launch events from the app on devices.