

PRODUCT COMPARISON

Info-Tech Advisor Premium - Compare



About this research note:

Product Comparison notes provide a detailed, head-to-head, analytical comparison of products in a given market in order to simplify the selection process.

Vendor Landscape: Web Conferencing; Show Me, Don't Just Tell Me

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Web conferencing has become a common tool for collaboration among employees, customers, and partners. While core Web conferencing features have become commodities, vendors are bringing specialized products to market for training, sales and team support, and marketing events. Use Info-Tech's Web conferencing vendor landscape to compare vendor and product options.

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Executive Summary

In recent years, core Web conferencing features have been commoditized by low-cost Web conferencing services. To continue to differentiate their products, vendors are creating specialized conferencing services and features targeted at a variety of enterprise use case scenarios, such as training and sales/marketing support.

This research note examines the top five Web conferencing products from Adobe, Cisco, Citrix, IBM, and Microsoft, and includes:

- » An overview of the Web conferencing market.
- » A discussion of core product functionality.
- » A comparison of the leading Web conferencing vendors and products.
- » Recommendations for selecting Web conferencing solutions.

Most organizations can benefit from the efficiency gains that Web conferencing can produce (e.g. travel cost reduction). However, organizations should consider Web conferencing as a key component of an effective collaboration strategy to improve customer communication, increase team effectiveness, and deliver interactive training.



Market Overview

Conferencing Past

The Web conferencing market evolved from early peer-to-peer desktop conferencing tools and from more simple server-based collaboration tools like chat and instant messaging (IM). Help desks needed to control end users' desktops, sales organizations could not keep up with the demand for onsite product demonstrations, and the workplace evolved into a hybrid of co-located and remotely located employees.

Peer-to-peer collaboration technologies have failed to advance in the enterprise due to security and scalability concerns. In addition, the complexity of extending these technologies to users outside of the organization's sphere of control, such as to customers and partners, has held these tools back.

While extending IM platforms with richer collaboration services makes architectural sense, IM has not emerged as a critical piece of business infrastructure, as e-mail did. Also, extending IM to customers and partners can be difficult without implementing expensive gateways. In fact, when integrated with directory services and presence detection, Web conferencing is assimilating IM services rather than IM assimilating emerging and richer collaboration services. Other collaboration services like social networking (e.g. Facebook Chat) are also incorporating IM.

For more information on collaboration tools, refer to the ITA Premium research note, "[Collaboration Tools Revisited in a Web 2.0 World.](#)"

Conferencing Present

The current Web conferencing market is dominated by five key enterprise vendors: Adobe, Cisco, Citrix, IBM, and Microsoft. However, as a result of various Web 2.0 and Software-as-a-Service (SaaS) trends, numerous low-end Web conferencing services are emerging, providing core services at compelling prices. Vendors of mission-critical enterprise applications are also integrating Web conferencing services into their portfolios via internally developed products (such as Oracle). In addition, some vendors are reselling other Web conferencing services with their own products (such as SAP reselling Adobe Acrobat Connect Pro).

The most prevalent use of Web conferencing services is to engage customers for product marketing, sales demonstrations, and customer post-sales training and support. However, traditional Web conferencing services such as whiteboards, screen sharing, and video conferencing are growing in use among employees within organizations.



Conferencing Future

Several trends are driving Web conferencing towards becoming a standard component of enterprise IT infrastructure, within 18-36 months. These include:

- » Increased acceptance of the SaaS model to deliver applications and services to employees and customers through a Web browser.
- » Preference for subscription-based licensing (i.e. fixed cost per user per month), especially for lower tier infrastructure services that may only be needed by parts of an organization (e.g. sales).
- » Increased employee and customer familiarity with Web conferencing concepts and collaboration tools, derived from personal experience (e.g. social networks, online video streaming, IM, file sharing).
- » Efforts by independent software vendors to disaggregate services currently bundled into single products in favor of on-demand services. These services can be integrated contextually into their other product lines or into services which partners use to build new applications (e.g. [Adobe's Common Collaboration Model](#) project, dubbed Cocomo, and [Cisco's WebEx Connect](#) platform).

Key Evaluation Criteria

The key selection criteria used in this evaluation of Web conferencing vendors are listed in Table 1, below.



Table 1. Web Conferencing Key Selection Criteria

Source: Info-Tech Research Group

Delivery and Licensing	This category evaluated delivery mechanisms (SaaS, on-premise) as well as licensing options (fixed-cost subscriptions, pay-as-you-go metered subscriptions, perpetual and volume licensing). SaaS was evaluated as a must-have feature, while pay-as-you-go and on-premise options were weighted lower than SaaS.
Core Functionality	<p>This category evaluated the features that Info-Tech believes are must-have features of a Web conferencing system, such as:</p> <ul style="list-style-type: none"> » Whiteboard. » Video. » Session recording (with audio). » Screen sharing. » Audio (VoIP). » Files/document library. » Application sharing. » Chat.
Advanced Functionality	<p>This category evaluated advanced Web conferencing features, which may cost extra, such as:</p> <ul style="list-style-type: none"> » Support for Webinar and tutorial creation using Microsoft PowerPoint as the business user’s authoring tool or a dedicated authoring tool provided by the vendor. » Live support options. » Event management services. » Polling, survey, quiz support. » E-learning/distance-learning virtual classroom support. » Audio via the public switched telephone network (PSTN). » Support for breakout meeting rooms and ability to reconvene in a master meeting room.
Value	This category evaluated price against features delivered and users supported.



Vendor Scorecard

Info-Tech’s evaluation resulted in scores with very narrow margins between vendors. This validates our belief that the key vendors in the high end of the Web conferencing market are relatively undifferentiated. As a result, *each* of the vendors and products we evaluated are capable of satisfying the generic Web conferencing needs of most organizations. Organizations should focus their selection efforts on the various Web conferencing usage scenarios from which they can derive the most value. Specific vendor recommendations concerning different use case scenarios are discussed in the Key Recommendations section of this research note.

Table 2. Web Conferencing Vendor Scorecard

Source: Info-Tech Research Group

	Adobe Acrobat Connect	Cisco WebEx	Citrix Online GoToMeeting	IBM Lotus Sametime Unyte Meeting	Microsoft Live Meeting
Delivery and Licensing	High	Medium	Low	Medium	Medium
Core Functionality	High	High	Medium	Medium	Medium
Advanced Functionality	High	High	Medium	Medium	Medium
Value	High	High	Medium	Medium	Medium
Rank	Leader	Leader	Follower	Competitor	Competitor

Using the criteria outlined in the previous section, Info-Tech has identified the Leaders, Competitors, and Followers among the top Web conferencing vendors (see Table 1 above).



Leaders

Adobe Acrobat Connect

Vendor	Adobe
Product	<u>Acrobat Connect</u>
Overview	<p>Acrobat Connect was originally acquired with Macromedia as Macromedia Breeze. Since then, Adobe has made real-time collaboration services a critical area of focus for the company's technical architecture. Recently, both Acrobat 9 and Creative Suite 4 have been released with real-time collaborations services from Connect integrated directly into the products. Info-Tech expects this trend to continue with integration of real-time services into Adobe's LiveCycle process management products.</p>
Product Offering	<p>Innovative Features:</p> <ul style="list-style-type: none"> » In addition to a hosted offering, it is available for purchase as an on-premise server installation with perpetual licensing. » Acrobat Connect and Connect Pro support perpetual conference rooms for anything from virtual classrooms to project rooms, and even personal rooms with personalized URLs. » Presenter plugin for using PowerPoint as a basic authoring tool for streamed multimedia and tutorial content, as well as an advanced suite of authoring tools called Captivate. This allows more freedom for business users to create content independent of audio/visual departments. » Can still be purchased under a pay-as-you-go metered option for SoHo users, although Acrobat.com now offers ConnectNow basic Web conferencing for free (up to three users). » Acrobat Connect Pro version is optimized for e-learning and enterprise collaboration scenarios. » When using ConnectNow through Acrobat 9 and Reader 9, PDFs can be reviewed and edited in real-time by more than one person inside the same PDF instance. Changes are rolled up into a single document in real-time, rather than employing the traditional document collaboration method of "passing the baton" during simple screen sharing or when employing asynchronous (non-real-time) document collaboration via e-mail.



Adobe Acrobat Connect (Continued)

Product Offering	<p>Cautions:</p> <ul style="list-style-type: none"> » Presenter PowerPoint plugin is intended for basic multimedia needs and has trouble rendering high volumes of complex PowerPoint animations. Advanced authoring should be performed with Adobe Captivate.
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Cisco WebEx

Vendor	Cisco
Product	WebEx
Overview	<p>Cisco acquired WebEx in 2007 as a complementary product for its audio/video conferencing hardware business. The product helped with Cisco's strategy to build an enterprise collaboration platform to compete with Microsoft. Similar to Adobe's Cocomo pilot, Cisco is transforming WebEx into an on-demand real-time collaboration service, which third-party developers can integrate into their own applications.</p>
Product Offering	<p>Innovative Features:</p> <ul style="list-style-type: none"> » Large, strong enterprise client list. » Product versions optimized for Webinars and e-learning scenarios. » Targeting remote support scenarios to complement large installed base of Cisco network hardware, consistent with Cisco's long-time commitment to electronic service. » Presentation Studio, a multimedia and tutorial content authoring application is available at an additional cost. » MediaTone Network provides carrier-class conferencing infrastructure. <p>Cautions:</p> <ul style="list-style-type: none"> » Many of the vendor demos and postulated use scenarios for individuals and small teams also require WebEx PCNow (remote PC access) and/or WebEx WebOffice (shared workspace), at additional cost.



Competitors

IBM Lotus Sametime Unyte Meeting

Vendor	IBM
Product	Lotus Sametime Unyte Meeting
Overview	Lotus Sametime Unyte is an on-demand Web conferencing service within the Sametime family of products, obtained by IBM through its acquisition of WebDialogs. It is probably the least known Web conferencing service of the products reviewed, since many organizations still think of Sametime only as an IM application.
Product Offering	<p>Innovative Features:</p> <ul style="list-style-type: none">» A free version, called Sametime Unyte Share, will support two users, similar to the free Adobe Acrobat ConnectNow (supports three users).» While Unyte is an on-demand service, the traditional Lotus Sametime is available for on-premise installation and perpetual licensing if desired.» A Skype plugin is available. <p>Cautions:</p> <ul style="list-style-type: none">» Free Unyte Share version uses peer-to-peer connections, which may not be allowed on every organization's network.

Microsoft Live Meeting

Vendor	Microsoft
Product	Live Meeting
Overview	Originally acquired by Microsoft via acquisition of Placeware, Live Meeting is one of many tools in the Microsoft real-time collaboration portfolio. Live Meeting is targeted at users who need on-demand conferencing, especially in sales, marketing, and training scenarios.



Microsoft Live Meeting (Continued)

Product Offering	<p>Innovative Features:</p> <ul style="list-style-type: none"> » Placeware was one of the first Web conferencing vendors to offer a complete set of end-to-end event management services. Live Meeting is still a good choice for organizations that want professional services to assist in the organization and execution of online events. » Microsoft has its own RoundTable 360-degree Web conferencing camera that supports meeting room video conferencing when multiple participants are gathered around a single table. <p>Cautions:</p> <ul style="list-style-type: none"> » The Microsoft real-time collaboration portfolio is complex and confusing. It includes Live Meeting, Office Communications Server, Windows Messenger, and even a P2P live sharing option within Microsoft OneNote. Organizations should consider Office Communications Server for on-premise, internal enterprise conferencing needs instead of Live Meeting.
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Followers

Citrix Online GoToMeeting

Vendor	Citrix Online
Product	GoToMeeting
Overview	<p>GoToMeeting is part of the Citrix Online family of products, originally acquired by Citrix through the acquisition of ExpertCity. GoToMeeting is the Web conferencing service, but the Citrix Online division also offers GoToWebinar, a service optimized for events and Webinars; GoToMyPC, a PC remote access solution; and GoToAssist, a remote support product. Citrix has attained a significant small and mid-sized enterprise (SME) client base for the GoTo products due to aggressive marketing campaigns targeted at SMEs; in addition, it established a clear SME value proposition for bundling GoToMeeting and GoToMyPC together.</p>



Citrix Online GoToMeeting (Continued)

	While GoToMeeting scored lowest in Info-Tech’s evaluation, we reiterate that the range of scores from high to low was narrow, indicating a lack of differentiation among the evaluated vendors for core Web conferencing services.
Product Offering	<p>Innovative Features:</p> <ul style="list-style-type: none"> » Info-Tech clients repeatedly report ease of use as one of their favorite features of GoToMeeting. » Strong suite of real-time collaboration product options in the GoTo family, able to expand into large Webinars and remote assistance. <p>Cautions:</p> <ul style="list-style-type: none"> » Shared, perpetual workspaces are not a strength of the GoTo product family. » No video camera support.

Key Recommendations

1. **For advanced e-learning, instructional media delivery, virtual classrooms, and real-time business document collaboration, choose Adobe Acrobat Connect Pro.** The Professional version of Acrobat Connect, coupled with the rich creative authoring tools in the Adobe portfolio, make Acrobat Connect Pro the best choice for education and training. The strong integration with Adobe Acrobat 9 and Adobe Reader 9 also makes Acrobat Connect Pro a great choice for real-time conferencing needs which center around business document collaboration.
2. **For real-time remote assistance and support, choose Citrix Online GoToAssist or Cisco WebEx remote support.** Both Citrix Online and Cisco WebEx have proven expertise in remote end-user support of both hardware and software.
3. **For sales and marketing presentations and product demos, choose Adobe Acrobat Connect Pro, Cisco WebEx Meeting, Citrix Online GoToMeeting, or Microsoft Live Meeting.** These vendors all have deep experience in delivering sales and marketing presentations and product demos, especially for companies wishing to deflect travel and for those whose transaction deal-sizes cannot support the cost of face-to-face demonstrations for every sales prospect. IBM Lotus Sametime Unyte certainly has this capability, but it has been in this market for a far shorter period of time and has yet to establish a competitive marketshare.



4. **For large Webinars and online events, choose Cisco Webex Webinar or Microsoft Live Meeting.** Cisco and Microsoft both have professional services staffs with deep experience in end-to-end event management. This makes them ideal choices for companies which do not have a dedicated internal event management staff. However, it should be noted that many dedicated events management service firms provide Web conferencing services as part of their solutions, so choosing a separate Web conferencing vendor for large online events may not be necessary.
5. **For entry-level or proof of concept Web conferencing, choose Adobe Acrobat ConnectNow or IBM Lotus Sametime Unyte Share.** Adobe and IBM both have free products for a limited number of users. They also exploit these free services as loss-leaders. This is an effective vendor market strategy as it familiarizes more business users with Web conferencing without IT involvement, placing pressure on organizations from the bottom up to adopt a standard Web conferencing product.

Bottom Line

Web conferencing has become a common tool for collaboration among employees, customers, and partners. While core Web conferencing features have become commodities, vendors are bringing specialized products to market for training, sales and team support, and marketing events. Use Info-Tech's Web conferencing vendor landscape to compare vendor and product options.

Info-Tech's products and services combine actionable insight and relevant advice with ready-to-use tools and templates that cover the full spectrum of IT concerns. Our practical approach is designed to have a clear and measurable positive impact on your organization's bottom line.

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