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When Business Rides for Free

Insights from Enterprise IT Decision Makers & End Users on Free Conferencing Services

This paper sponsored by



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Executive Summary

We recently surveyed enterprise IT Decision Markers (ITDM) and End Users about their use and preference for conferencing services. This study was primarily undertaken to explore the impact of free conferencing services within the enterprise, but also provides general insight into IT decision makers (ITDM) and End User preferences for audio, web and video conferencing.

Key Findings

- 1) The majority of enterprise ITDMs and End Users are familiar with the concept of free conferencing services, and have or would consider using them for business
- 2) Among End Users, the free conferencing service experience is the same or better than paid service experiences
- 3) FreeConferenceCall.com is the most recognized free conferencing brand
- 4) People most often discover free conferencing by trial or referral
- 5) IT Decision Makers are constantly evaluating their conferencing services - assessing at least every two years – and are spurred by End User preferences.
- 6) End Users now have almost as much influence as Corporate IT in terms of driving product decisions
- 7) Cost and Quality are top-of-mind in terms of choosing a conferencing service provider

Tell Us How You Feel

While some of the respondent answers are what you might expect, many contradict the way most organizations buy and use these services. We first asked how and why each group uses conferencing services, and then moved on to their experiences with free conferencing services.

A few qualifiers on the respondents:

- Must be in an organization with >250 employees (this was a study of businesses and large non-profits, not small organizations or consumers)
 - 78% were in organizations with >500 employees, 22% were in organizations with 250-500 employees,
 - 77% were in business, 23% were in non-profits (e.g. government, education, etc.)
- Must be responsible for selecting conferencing services, an active account holder, or conference participant
 - 100 were IT Decision Makers (ITDM), 100 were active account holders or participants
- Must be located in North America – because North America represents 70% of all conferencing activity worldwide

Use and Preferences

Insight: People in large organizations use many different forms of conferencing services regularly.

Data: 69% use audio conferencing weekly, 58% use web conferencing weekly, and 49% use video conferencing weekly. 22% indicated daily use of audio conferencing.

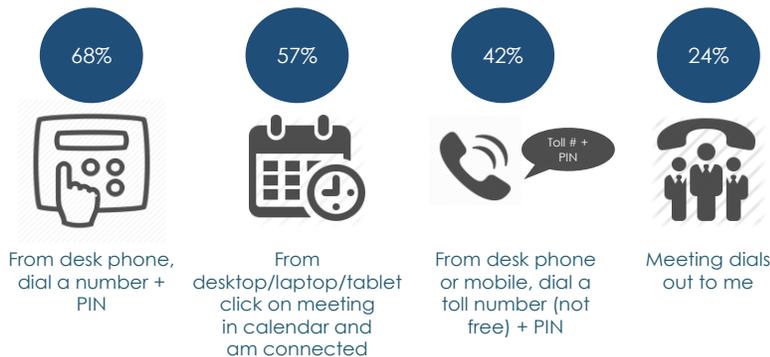
What this means: OK, yeah, we did qualify they had to be a conferencing user to get into the study, but we did not qualify how BIG a user. These results indicate enterprise users who conference, conference a LOT.

Insight: Toll-free access does not really matter to many users.

Data: When asked how they access conference calls, 44% stated they often use a toll number. In fact, many people use multiple ways of access in addition to toll free – including click-to-call (57%) and dial out (24%)

Survey Question:

When you have an audio conference call, how are you usually connected to the call?
(check all that apply)



What this means: More people are using alternatives to expensive toll free access when they are available. The price for every conferencing service in the world is composed of two parts – the cost of bridging the call plus the network charge for access. The fact is that the network charge for toll free services is material – compared to the usually 'free' cost of toll or dial-back services. Selecting a service with toll access, click-to-connect, or dial back can save hundreds of thousands-to-millions in network fees. While people have been trained to use toll-free (it is not free to the conference host), 44% of the study respondents stated that it makes no difference to them whether they have a toll-free or toll number.

Insight: Time + Distance + Costs = Conferencing Use

Data: On average, 50% the respondents consistently cited travel restrictions, encouragement by management (likely restricted from traveling by management), increased productivity, and budgetary concerns as the primary drivers behind their conferencing use. The largest response at 72%, was "scattered location of participants" (makes sense).

What this means: The two most common responses were increased productivity (67%) and the geographic distribution of participants (72%). Today, so many of us are time slicing between our personal and business lives. Anything that helps us manage our commitments is quickly adopted into our routine. Traveling to meet in-person is often critical, but not necessary to connect with people you know well. Most mid-to-large sized organizations employ global teams – what could be more productive than the ability to hop from a morning meeting with the team in London to an afternoon call with a client in Sao Paolo, and finish early in the evening with a management call to Hong Kong – all the while staying in the same time zone?

When It Comes to Making a Decision

Insight: ITDM's are frequently on the lookout for new services.

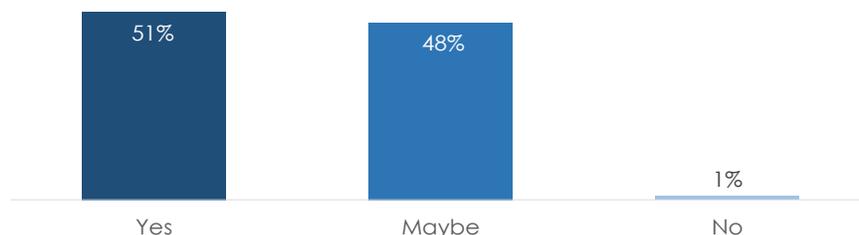
Data: 83% of ITDMs are re-evaluating new conferencing services at least every two years - 45% are on the lookout every year, 38% every two years.

What this means: Quality of service, new features, and cost are up for re-evaluation on a regular basis. While most organizations do not change up their service every year, they are certainly evaluating alternatives. The constant push by users for better and more services can also be a contributing factor – we all recognize the impact the consumerization of IT has had in the enterprise.

Insight: It is not just about price.

Data: While 51% of ITDMs said "Yes", they would consider moving to a new service if the cost were 50% less than their current provider, 48% said "Maybe", but that the new service would need to be equal to or better than the current service (yep, 51% + 48% = 99%, so, one percent – i.e., one person - just said "no").

Survey Question (ITDMs):
If audio conferencing services were provided for 50% less than the price of your current provider, would you consider moving to a new service?



What this means: Price is an ever present, overarching theme and foundational to service selection. Because of this, other elements contributing to the value equation (e.g., cost + quality) rise in importance – if call quality is not sufficient or call access creates anxiety or requires a lot of effort, it is not worth it.

Insight: It is not just about ITDMs. Today, there is nearly equal influence between ITDM and users when choosing a new service.

Data: ITDMs indicate corporate IT or line of business IT has 55% of the influence over product decisions and line of business management or end users have 45% influence.

What this means: Users have gained a lot of power over product and service selection in recent years. Not long ago, IT was command and control, responsible for setting rock solid standards for what users could have and use – no longer.

What About Free Conferencing Services?

Insight: More people know about free services than you think.

Data: 59% stated they are familiar with free conferencing services and of that group, 88% have participated in a free conference call and 73% have participated in a free conference call for business.

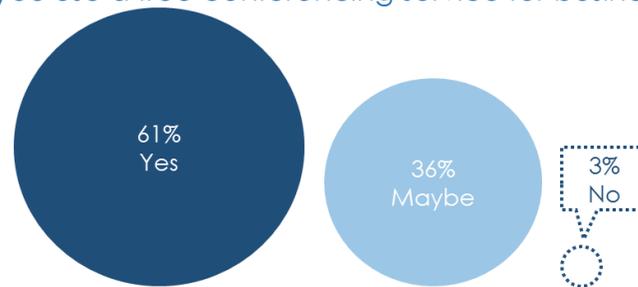
What this means: It is true – free conferencing services started out being used mostly by non-profits (churches, schools, committee meetings); however, based on a primarily positive experience, we are seeing a huge adoption within the enterprise.

Insight: Free conferencing is appropriate for business.

Data: When asked if they would use a free conferencing service for business, 61% said “Yes”, and 36% were open to the idea, indicating “Maybe, but I would need to be convinced”. Just 3% said “No”.

What this means: Having used free services in their community for church meetings, committees, and community service organizations, users have become convinced that free services are “enterprise-grade” and hold confidence in the brand and service to use in their business interactions.

Survey Question:
Would you use a free conferencing service for business calls?



Insight: 9 out of 10 people Claim their Experience with a Free Service is “About the Same”, or “Better” than Paid Services.

Data: Asked to rate items such as Call Access and Entry, Sound Quality, Ability to Naturally Interact with Others, and Overall Experience, on average 91% claimed their experience was on par or better than paid services, with 37% claiming the overall experience with free services was “Better” than paid services.

What this means: It’s simple – who doesn’t want to get an equal or better product or service at less cost?

Just for Fun

Insight: People who are open and talkative in meetings want to talk more.

Data: Whaaaat???. This is really whacked, but we asked respondents to tell us how they behave in meetings. 57% state they are open, talkative, sharing ideas and speaking whenever they get the chance.

What this means: Garrulous. That’s what we think it means.
[LMGTFY](#) (Let Me Google That For You)



In the next question we asked, “If you could mask your ID and voice in a conference call and ask any question or make a remark without retribution, would you...” And you know what? 60% responded they would speak more in a conference call.

An Introduction to FreeConferenceCall.com For Business (freeconferencecall.com/for-business)

In our study, Free Conference Call (Free Conferencing Corporation), the sponsor of this paper, was the most recognized free conferencing brand, and is the fifth largest¹ provider of audio conferencing services worldwide. By conferencing volume, FreeConferenceCall.com ranks as the #3 provider next to InterCall and AT&T within the U.S. market.

Top 5 Audio Conferencing Providers Worldwide (by volume of minutes)	
#1	InterCall
#2	AT&T
#3	PGi
#4	BT
#5	FreeConferenceCall.com

The company has four brands: FreeConferenceCall.com, FreeConferenceCallInternational.com, FreeScreenSharing.com, and StartMeeting.com. This company owns and controls their entire infrastructure and carries many of their clients' conferencing traffic across their own network.

After realizing they were supporting thousands of individual business account holders, the company formed FreeConferenceCall.com For Business to address the unique and specific needs of administrating an account within a business.

FreeConferenceCall.com For Business is a new enterprise-class conferencing service, powered by the world's largest free conferencing company.

The service has been designed with the enterprise's most critical needs in mind:

Challenge	FreeConferenceCall.com For Business Solution
Eliminate the Price of Audio Bridging	Wanna talk to a zillion people at the same time? (most people only connect with an average of four). Go ahead - connect up to 1,000 callers at no cost.
Eliminate domestic network conference call fees	Zilch, zero, nada – no cost for network fees when using a toll number (but, hey, if you want to go old school, they have toll free numbers for those who like to pay).
Bonus!	As a bonus, administrators can manage users and individual conferences via a web browser with one-click web controls.

¹ 4th largest market share worldwide based on audio conferencing minute volume

Additional Features

Meeting Wall - A persistent, customizable meeting wall where account holders are able to create a personal landing page for participants. Includes the meeting organizer's photo or company logo, the meeting title and description, cloud file storage, meeting scheduling, web controls for audio meeting, chat wall, and Radio – the ability to stream your call for anyone visiting your Meeting Wall URL. Cost: Free

Studio – Create and stream cloud-based presentation with audio. This feature records anything on your screen with audio - on-demand, with unlimited viewing. Cost: Free

Want local dial in numbers for your international people? Local access from 55 countries.

Customized options include white label branding, record your own customized greeting for conference participants and your own style of on-hold music, dedicated dial-in numbers, and IP/SIP trunking to your PBX and on-premises Microsoft Lync

Summary

78% of our study respondents are from organizations with 500 employees or larger, and no respondent came from an organization of less than 250 employees. This target audience is the typical domain that buys toll free audio conferencing bundled into a network package from a large Telco or from a specialty conferencing service provider. Yet, 59% have participated in a free conference call, and of that group, 73% claim to have done so in a business meeting. 91% stated their experience was "about the same" or "better" as their traditional paid service.

We will ask the same question we asked our enterprise ITDMs, "If audio conferencing services were 50% the price of your current provider, would you consider moving to a new service?" 51% of your peers said, "Yes", 48% said "Maybe, but I would need to be convinced the new service is equal to or better than our current service". How would you respond?

About the Authors

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About Wainhouse Research

Wainhouse Research is an independent analyst firm that focuses on critical issues in the unified communications and collaboration market. The company provides 6 different vendor subscriptions covering unified communications, group videoconferencing, personal & web-based collaboration, audio conferencing, streaming & webcasting, and distance education & e-Learning solutions, as well as a single all-inclusive subscription for enterprise users. The company acts as a trusted advisor providing strategic advice and direction for both the UC&C industry and its enterprise users. For further details contact sales@wainhouse.com or see <http://www.wainhouse.com>.

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