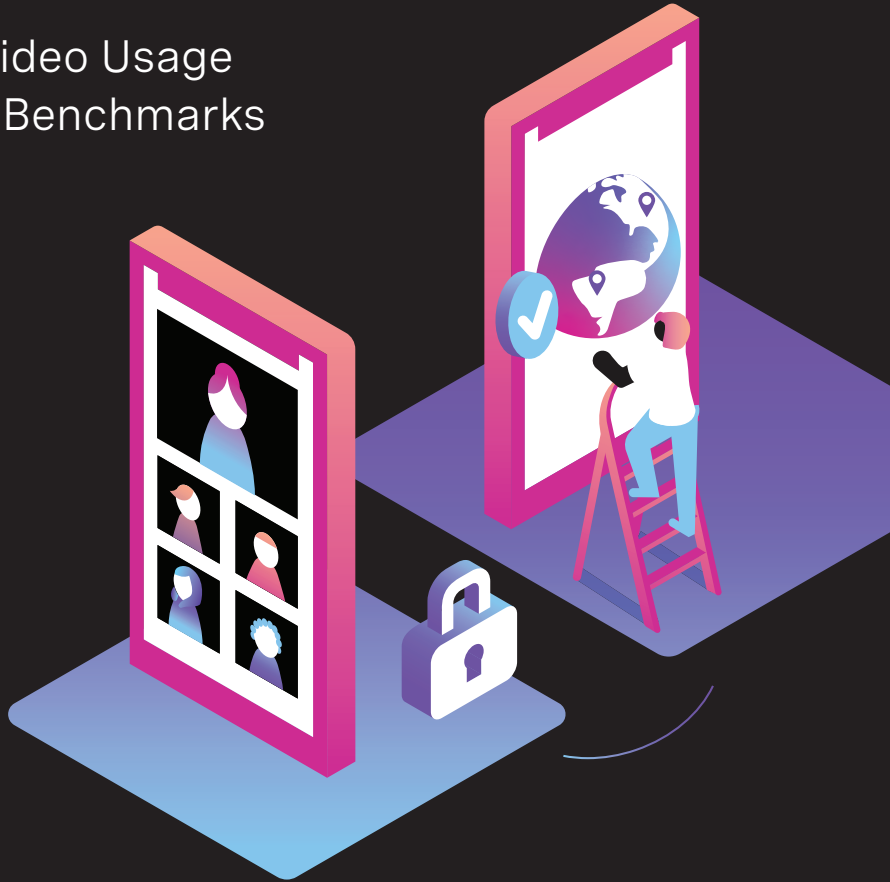




Amid Global Video Usage Surge, Regions Differ in Organizational and Consumer Readiness

Vonage Video Usage Trends & Benchmarks

APRIL 2020



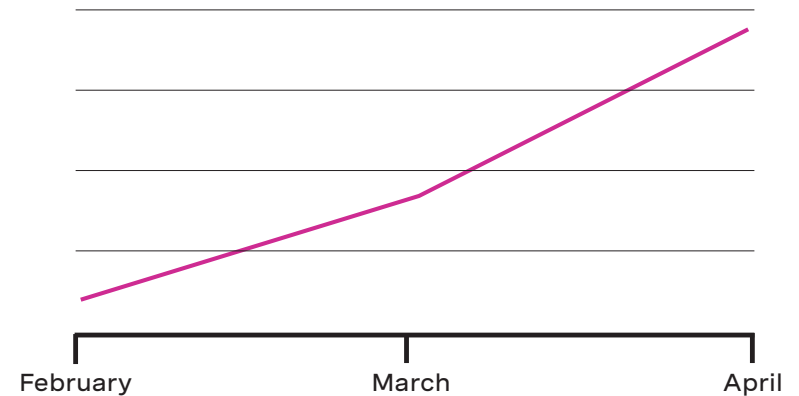
If you had to name the defining characteristic of COVID-19, *global* would be a logical choice (it is a pandemic after all). If you had to choose a defining characteristic of the most successful responses to the pandemic, *preparedness* might be the top choice.

As Vonage continues to report on the massive growth in the usage of our Video API since the COVID-19 outbreak, we dig into the global nature of this growth and the preparedness of the organizations and populations behind it.

Following the explosive month-over-month growth in video minutes streamed over the Vonage platform in March (a 232 percent increase over February), total video minutes in April continued to surge, growing an additional 144 percent over March (see Figure 1).

FIGURE 1.

Overall Vonage video minutes by month



Overall Vonage video minutes increased by

232%

in March over February

Overall Vonage video minutes increased by

144%

in April over March

Every region around the globe has experienced this growth, but certain geographies have accelerated their video usage more than others.

Many factors contribute to the regional differences but none may be more predictive than preparedness. As we stated in the **March Edition of this report series**, the organizations that had cloud-based video communications embedded in their applications were prepared to meet the flood of demand for video communication.

But what about the people those organizations serve? How prepared were they to adopt video as a primary communication channel in their daily lives? We have some insight into that too. In January 2020, before COVID-19 leaped to the front of everyone's consciousness, Vonage surveyed 5,000 consumers across 14 countries to find out how they like to communicate with businesses and each other. Their responses went into **The Vonage Global Customer Engagement Report, 2020** and gave a pre-coronavirus indication of which regions were most ready to adopt video.

We believe next year's survey will reflect the fundamental shift consumers are experiencing in their communication behaviors and preferences. For now, let's look at how consumer attitudes toward video communications aligned with usage rates in their respective regions.



"Organizations with more complex needs, such as telehealth and distance learning, require security and ease-of-use that can only be achieved by embedding video into an organization's current platform."

Zeus Kerravala, founder and principal analyst
at ZK Research

Video Communication Growth by Region

ASIA-PACIFIC

Consumers Were Ready for Video and Usage Soared

When in-person interactions suddenly became restricted and voice- or text-only conversations became inadequate for certain services, consumers in APAC were most ready to use video.

Did you know?

- APAC had the highest increase in Vonage video minutes in April over March
- 83% of consumers in China used video chat to communicate with businesses and service providers *before* the COVID-19 outbreak
- In every region, younger consumers (under 40) used video chat to communicate with businesses and service providers more than older consumers (over 40). Yet older APAC consumers video chatted with businesses and service providers at roughly the same rate as younger UK and North American consumers, demonstrating an advanced comfort level with the use of this technology.

In APAC, overall Vonage video minutes increased by

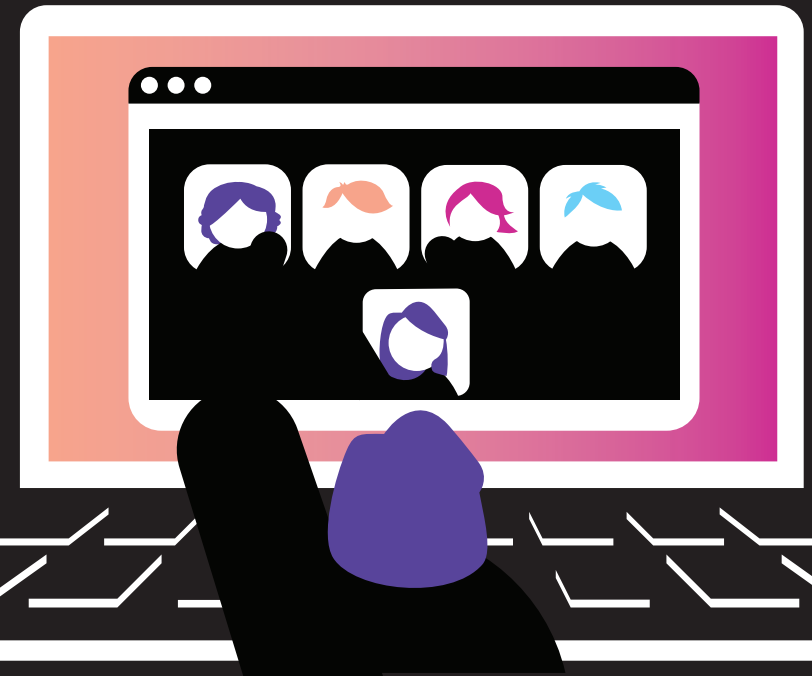
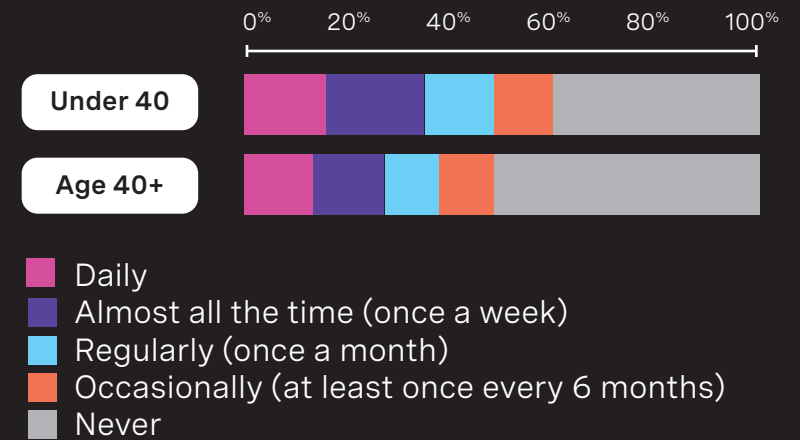
244%

in April 2020 over
March 2020

605%

in April 2020 over
January 2020

Frequency and preference for using Video Chat in APAC



AMERICAS

Age Group and Sub-regional Differences Make for Mixed Video Readiness

The stark differences in video chat experience between younger and older and between north and south exemplify the Americas' diverse consumer populations.

Did you know?

- The Americas have the highest increase in Vonage video minutes since January
- North America had the widest experience gap between age groups in video chat with businesses and service providers
- Consumers in Latin America have the most video chat experience with businesses and service providers

In the Americas, overall Vonage video minutes increased by

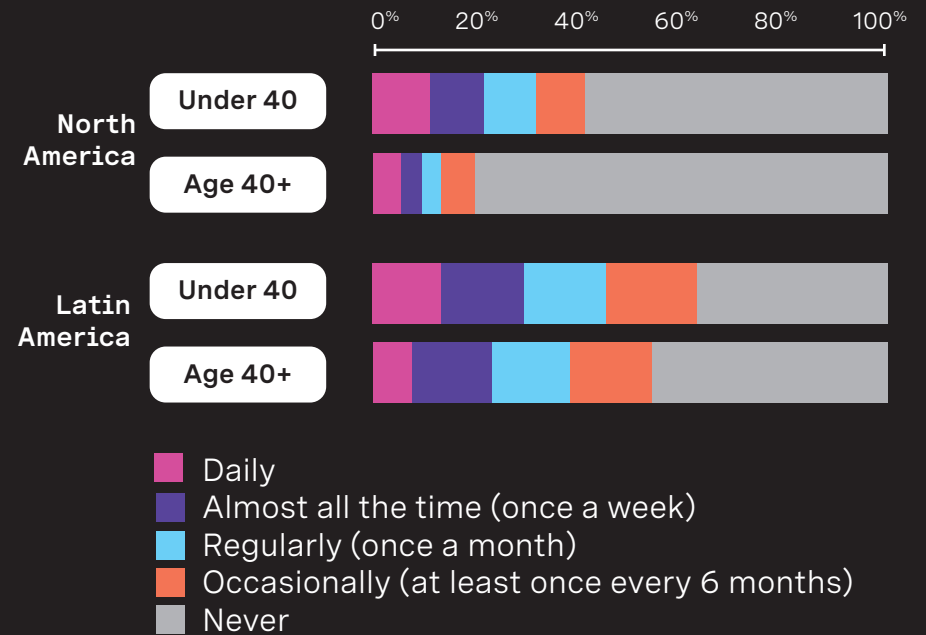
157%

in April 2020 over
March 2020

843%

in April 2020 over
January 2020

Frequency and preference for using Video Chat in the Americas



EUROPE, THE MIDDLE EAST, AND AFRICA (Not So) Slow and Steady Growth

In most cases nearly 6X growth in three months is exceptional. Not so in the case of video usage during COVID-19.

Did you know?

- EMEA's 489 percent increase in video usage since January is the lowest among the three major regions.
- Consumers in the UK and North America share almost identical profiles in video chat experience with businesses and service providers
- Consumers in both regions lag their counterparts in APAC and EMEA in video chat experience with businesses and service providers

In EMEA, overall Vonage video minutes increased by

86%

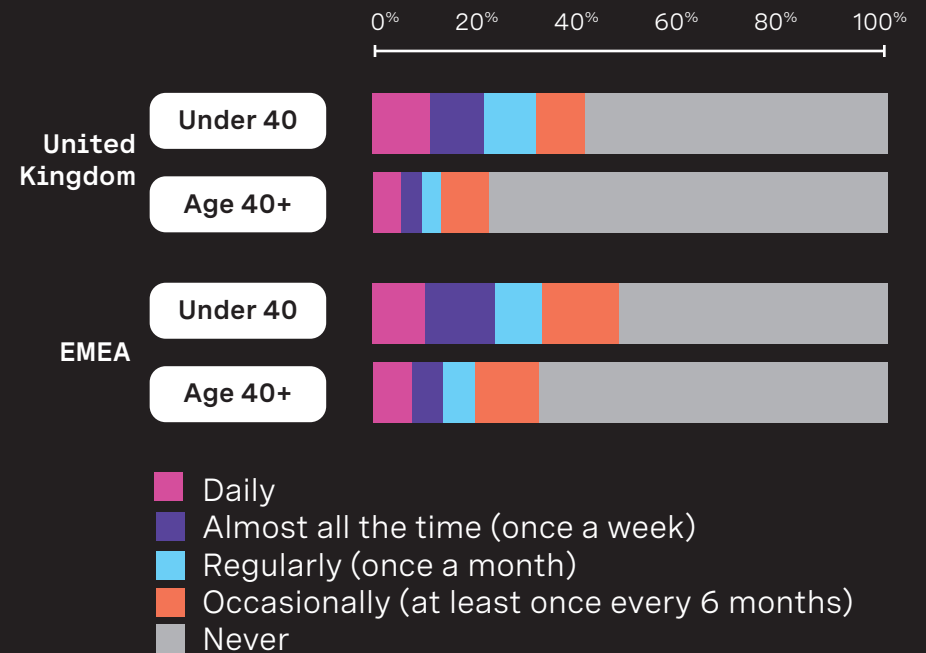
in April 2020 over
March 2020

553%

in April 2020 over
January 2020



Frequency and preference for using Video Chat in the United Kingdom and EMEA



Video Communication Growth by Industry

We haven't forgotten about video usage at an industry level. Here is how it is tracking since the onset of the pandemic.

Increases in Overall Vonage Video Minutes by Industry, 2020

Industry	April over March	April over February
Healthcare	186%	2306%
Education	32%	92%
Technology	70%	572%
Business Services	80%	490%
Social	107%	684%
Media	172%	1033%
Financial Services	48%	109%

"Vonage APIs helped us seamlessly manage the 27% increase in new customers using telehealth since the onset of the global health crisis. Now, more than 60,000 clinicians can use our integrated telehealth functionality—in addition to the rest of SimplePractice's robust patient scheduling, documentation, billing, and insurance platform from wherever they are."

Howard Spector, Co-founder and CEO of SimplePractice

Vonage will continue to provide updated benchmarks and insights into how organizations and the people they serve are leveraging video to stay productive in this new reality.

Industry Observations for April:



- Increases in telehealth engagement continued to drive video usage in healthcare. Two factors fueled this trend:

1. Patients who had passed on non-emergent appointments were now engaging more via telehealth as primary care physicians re-opened offices.
2. More insurers agreed to **reimburse for telehealth appointments**.



- Education continued to lag the greater market as OTT video solutions met educators' short-term need to get up and running. The expectation is that the education industry will see slower-than-average growth as schools are still in session. Fall 2020 should see a significant increase in video traffic as new means of collaboration are brought to classes for the new school year.



- Media traffic is outpacing many industries as broadcasters are still faced with airing content using dispersed media personalities and production teams.

Visit vonage.com/video-apis to learn more about creating richer customer experiences with our Video API.