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

Vonage Video Usage Trends & Benchmarks, Second Edition

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 growth in video minutes streamed over the Vonage platform between February and April (a 707 percent increase), total video minutes have remained high, with July usage at 501 percent over February usage (see Figure 1).

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**FIGURE 1.**

[Graph showing overall Vonage video minutes by month with bars for February to July, indicating significant increases in April and July compared to February.]
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 First 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, but by July it had also experienced the largest reversion toward its pre-Coronavirus levels—indicating it may be settling into its “new normal” faster than the other regions.
• 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

605% in April 2020 over February 2020
195% in July 2020 over February 2020
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

843% in April 2020 over February 2020
701% in July 2020 over February 2020

Frequency and preference for using Video Chat in the Americas

<table>
<thead>
<tr>
<th>Region</th>
<th>Under 40</th>
<th>Age 40+</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Latin America</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

0%         20%         40%         60%         80%         100%

- Daily
- Almost all the time (once a week)
- Regularly (once a month)
- Occasionally (at least once every 6 months)
- Never
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 from January to April was 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

553% in April 2020 over February 2020

385% in July 2020 over February 2020
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

<table>
<thead>
<tr>
<th>Industry</th>
<th>April over February</th>
<th>July over February</th>
</tr>
</thead>
<tbody>
<tr>
<td>Healthcare</td>
<td>2306%</td>
<td>1812%</td>
</tr>
<tr>
<td>Education</td>
<td>92%</td>
<td>74%</td>
</tr>
<tr>
<td>Technology</td>
<td>572%</td>
<td>593%</td>
</tr>
<tr>
<td>Business Services</td>
<td>490%</td>
<td>380%</td>
</tr>
<tr>
<td>Social</td>
<td>684%</td>
<td>261%</td>
</tr>
<tr>
<td>Media</td>
<td>1033%</td>
<td>571%</td>
</tr>
<tr>
<td>Financial Services</td>
<td>109%</td>
<td>108%</td>
</tr>
</tbody>
</table>

“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

Industry observations from the past few months:

- Increases in telehealth engagement continue 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 pick up growth as schools resume. 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.