

# IDC MarketScape: Worldwide Collaboration and Community Applications 2021 Vendor Assessment

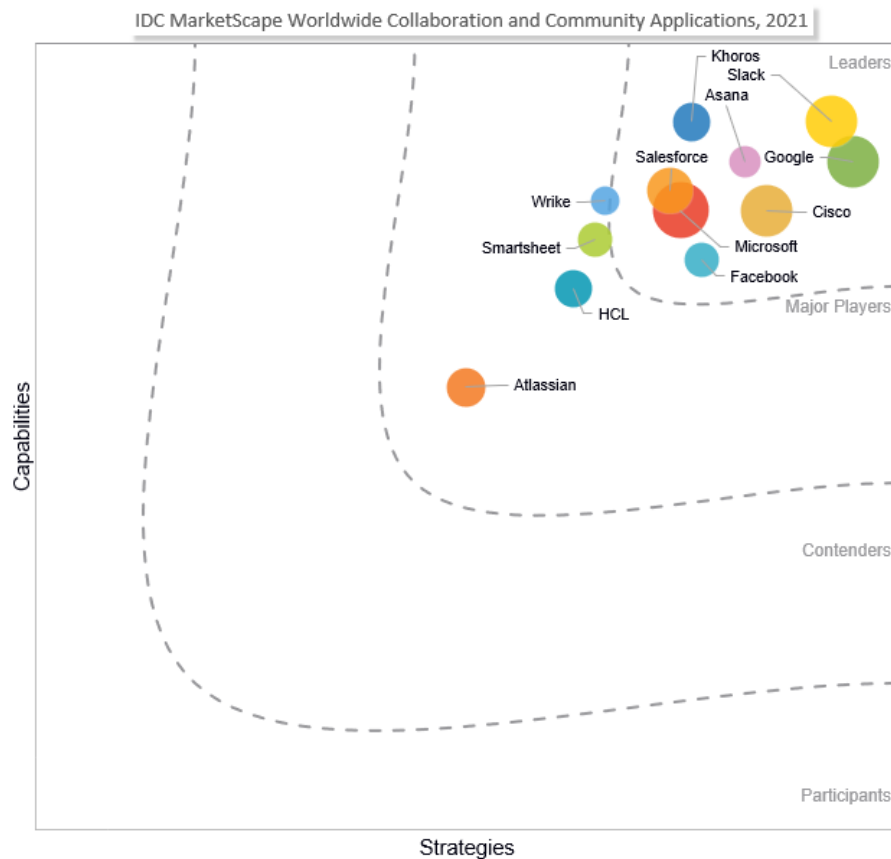
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THIS IDC MARKETSCOPE EXCERPT FEATURES KHOROS

## IDC MARKETSCOPE FIGURE

FIGURE 1

### IDC MarketScape Worldwide Collaboration and Community Applications 2021 Vendor Assessment



Source: IDC, 2021

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

## IDC OPINION

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This study applies the IDC MarketScape methodology to evaluate major global collaborative and community platform vendors.

As the pandemic drove the increased need for collaborative technologies, three primary categories emerged: team collaborative applications, team collaborative applications with native work management, and enterprise communities – community management platforms that connect within and outside the enterprise. For this document, IDC identified leaders in the team collaborative applications and enterprise community functional markets. In detail:

- The collaborative applications market has become essential to connect a digital workforce to their colleagues and work, regardless of where they work.
- Collaborative and community products are connecting both internal workers and partners and customers.
- With an intense feature velocity, vendors are distinguishing themselves as unique, while integrating with other products to help drive seamless workflow and improved metrics.
- Enterprises of every size are centralizing work and communications on team collaborative and community platforms.
- These platforms, unlike email, keep relevant conversations with meeting assets in one place, saving considerable time while encouraging other voices to be heard, driving better results.

## IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

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This IDC MarketScape looks at team collaborative applications and enterprise community application vendors. The criteria for inclusion are as follows:

- Vendors must have appeared in IDC's 2019 and 2020 market share research documents as a top 10 worldwide vendor in the collaborative applications market share, the team collaborative applications market share, or the enterprise communities (enterprise social networks) market share documents.
- Vendors must offer a proprietary product with the primary purpose of enabling or fostering collaboration and/or communities for a line of business or an enterprise.
- Vendors must have a presence in the United States and at least one other country.
- Vendors must sell to at least three global regions.
- Products in this study were reviewed as they were in general availability as of August 1, 2021.

## ADVICE FOR TECHNOLOGY BUYERS

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- Customers need their collaborative applications to support the APIs of the vendors they use, including CRM, HRIS, and their marketing technology stack. The business goals are more consolidated data, greater employee, partner and customer experience (CX), and machine learning (ML) to drive new and better outcome-based metrics.

- Vendors responded to the events of 2020 with massive feature velocity. This shows little sign of abating over the next few years.
- Customer support is lacking for some vendors, in part due to the explosive growth in the market. Communities of customers, where they exist, help deflect the support needs and create brand loyalty.
- Many vendors started adopting a greater role for partners to be the first line of sales and support; this is meeting with widely varied and mixed results. Several customers interviewed voiced that the partners may not be using the applications they are selling, creating a knowledge and support gap. Customers want to buy and get support online, have a community of users available to them, and want to be able to alter their offering based on emerging needs.
- Enterprises are asking for longer term, continuous road maps, and product updates. Companies that deliver annual or biannual updates have an optics challenge of being less innovative.
- Ease of online purchasing, enterprise package customization and deployment, and customer onboarding and support are challenges for many but not all vendors. Customer experience is an imperative. Simplify these areas.
- Customers voiced the needs for better APIs for many (but not all) products, as well as more help executing change management to be more collaborative.
- Customers expressed the need for real-time translation and support for multiple global regions.

## VENDOR SUMMARY PROFILES

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This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

### Khoros

Khoros is positioned in the Leaders category in this 2021 IDC MarketScape for worldwide collaboration and community applications.

The result of the Lithium Technologies (communities and social customer service) and Spredfast (social media management) merger, Khoros, continues to add features to its community and digital customer engagement platform. Khoros has active community product deployments in 27 countries and supporting over 40 languages. They also support some of the largest communities by some of the world's largest brands.

Since the merger, in addition to engagement on the standard social channels (such as Facebook and Twitter), the API-friendly platform launched support for the integration of Apple Business Chat, Google's Business Messages, WhatsApp, web chat, and email – as a partial list. Also launched was Khoros Bot and new AI features such as Suggested Responses, Community Events, and Community Group Hubs to scale engagement and customer service.

Recent acquisitions of machine learning and conversational AI company Flow.AI and CX insights company Topbox will result in a new generation of features for Khoros.

## Strengths

- Khoros provides a wholistic look at social business and customer experience. Khoros is known for hosting communities' social channel and chatbot engagements as well. The company's single, consolidated dashboard approach is unique in the market. Dashboards are available for a multitude of levels, including community manager.
- Khoros has sophisticated gamification with separate badging and rank systems to allow for different incentives and engagement patterns for visitors, new members, experts, and super users across 100+ different trigger events.
- The company has content syndication tools for taking community into any digital space with low-code or no-code widget and flexibility to embed based on a variety of content characteristics.
- Engagement workflows, automation, and bots enable better scaling of community engagement.
- Khoros Atlas, its support community, is a well-moderated, highly active, and robust community of users. Khoros collaborates with the user base, modeling best practices.
- Khoros can and should be as much for marketing solutions as for customer support.
- Rich APIs enable Khoros to support a variety of use cases, especially when enhanced with ML/AI.

## Challenges

- Most companies do not yet understand that if a well-moderated community is not staffed and promoted by the company, B2B and B2C customers will create one, where the company has no reach nor insights.
- A significant market challenge has been the expanding definition of what it means to build an online community. As the major social networks invest in more engaging ways to connect people, the definition of what it means to be an online community is evolving. Virtual events, branded communities, messaging, and collaboration – the market is becoming broader and more competitive. Still, it centers on connecting people in a relevant community.

## Consider Khoros When

Consider Khoros when digital relationships are important to your company's customer experiences and you would prefer a unified social dashboard to manage these experiences.

## APPENDIX

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### Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level

decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

Using the leaders in these markets created a very mature picture of the market. These were among the companies that "stepped up their game" to meet the emerging needs of 2020, and beyond. Even the least mature product in this grouping became mature and very stable. This created a challenge in the visual of the IDC MarketScape graph (refer back to Figure 1); however, we have clarified in the Vendor Summary Profiles section for each vendor.

## **IDC MarketScape Methodology**

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

## **Market Definition**

### ***Collaborative Applications***

Collaborative applications enable groups of people to work together by sharing information, communications, and frequently processes. Definitions of collaborative applications markets are presented in the sections that follow.

### **Enterprise Community Applications**

Enterprise community applications enable social collaboration capabilities to users that are either inside or outside an organization's firewall. Solution capabilities should include, but are not limited to, activity streams, blogs, wikis, microblogging, discussion forums, groups (public or private), ideas, profiles, recommendation engines (people, content, or objects), tagging, bookmarking, and online communities. An enterprise community application provides a social collaboration or relationship layer in a business that can be a discrete standalone solution and/or a set of service-oriented application programming interfaces (APIs) or integrated applications that coexist with other business and communications applications. Discrete solutions may support one type of social functionality (such as online communities, ideation, or innovation management) or a broad-based platform that encompasses many functionality traits.

### **Team Collaboration Applications**

Team collaboration applications (TCAs) provide a workspace and an integrated set of web-based tools for an ad hoc, unstructured, asset-centric, or document-centric collaboration between groups or individuals between known domains. A TCA can be represented by secure "channels" or "rooms" that contain documents, chat history, and transaction history to maintain a persistent auditable history or a more multipurpose shared workspace where users are able to store, access, and share files.

Administration is primarily performed by a known user (that governs access rules), but IT administration controls/management may also be possible. TCA solutions may also allow directory integration, policy management, and integration with social collaboration tools (content shared within the social context of newsfeeds or groups). Communication within the TCA environment is mostly asynchronous, business to business (B2B), and closed to a specific set of eyes.

## **Strategies and Capabilities Criteria**

Tables 1 and 2 provide key strategy and capability measures, respectively, for the success of team collaborative applications and enterprise community application vendors in this document.

**TABLE 1****Key Strategy Measures for Success: Worldwide Collaboration and Community Applications**

Criteria categories	Definition	Weight (%)
Functionality or offering strategy	Strategy to match evolving business needs	15.00
Customer delivery and road map	Ability to meet evolving enterprise demands	15.00
Support strategy	Customer's perception of vendor's customer and community support	10.00
Architecture/platform strategy	Platform architecture strategy	15.00
R&D pace/productivity	R&D planning	15.00
Security	Security, governance, and compliance strategy	15.00
Ease of adoption	Pace of internal adoption to be functional	10.00
Growth: Purchase experience	Purchase experience as compared with other products	5.00
Total		100.00

Source: IDC, 2021

**TABLE 2****Key Capability Measures for Success: Worldwide Collaboration and Community Applications**

Criteria categories	Definition	Weight (%)
Functionality or offering	Essential capabilities	15.00
Business results metrics	Metrics to measure business results	15.00
Advanced functionality	Product-specific features	5.00
Architecture	Offering built as API focused	10.00
Range of services: Ecosystem	Developers and partnerships	15.00
Customer service delivery	Customer product and service satisfaction	15.00
Security, governance, and compliance	Security, governance, and compliance of offering	15.00
Portfolio benefits	Portfolio of offerings	10.00
Total		100.00

Source: IDC, 2021

**LEARN MORE****Related Research**

- *Worldwide Collaborative Applications Forecast, 2021-2025* (IDC #US48061821, July 2021)
- *Worldwide Collaboration Applications Market Shares, 2020: The Year of Mass Adoption* (IDC #US48061921, July 2021)
- *IDC's Annual Collaboration Survey, 2021* (IDC #US46305621, May 2021)
- *IDC Conferencing Applications and Virtual Events Survey 2021: New Expectations* (IDC #US47693821, May 2021)
- *The Rapidly Evolving Future of Collaboration and Conferencing* (IDC #DR2021\_FoW\_WK, March 2021)
- *Market Analysis Perspective: Worldwide Collaborative Applications, 2020* (IDC #US45918920, September 2020)



## Synopsis

This IDC study represents a vendor assessment of the collaborative and community applications market through the IDC MarketScape model. Team collaborative applications and enterprise community applications became critical to connect workers, vendors, partners, and customers. Each vendor has differentiated itself with both core abilities and integration abilities that they believe will be most in demand in the future. While some companies saw customer service challenges in their growth, all are seeking better ways to improve adoption to make collaboration and communities a core part of the enterprise IT stack going forward. If user adoption of these platforms is any gauge for the future, collaborative and community platforms will be very successful. Enterprises must embrace them as a new way to communicate, form community, improve customer and worker experience and, most importantly, redesign legacy processes.

"The future of business is the connection and communities with the workforce, partners, and customers," according to Wayne Kurtzman, research director for Social, Communities, and Collaboration Applications at IDC. "Deep integrations with the rest of the technology stack improve insights, minimize context switching, and drive significantly more productivity with better worker experience. Companies that fail to provide well-designed collaboration and community platforms will force their workforce, partners, and customers to create their own solutions."

## About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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