Market Guide for Visual Collaboration Applications

Published 26 April 2023 - ID G00770000 - 16 min read

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Today's information workers collaborate visually for a range of business processes and engagements — increasing productivity through quicker resolution and improved clarity of outcomes. This Market Guide helps application leaders understand technology and usage trends in this emerging market space.

Overview

Key Findings

- The visual collaboration applications market has seen a spike in growth in the past few years. Teams are increasingly seeking new ways to express themselves using shareable, scalable, interactive digital canvases accessed from their personal devices or conference room touchscreen monitors.
- Visual collaboration applications enable greater productivity and clarity of project results. Enhanced collaborative canvases make it easier to visualize complex tasks and concepts.
- Many organizations understand the benefits of adopting visual collaboration applications for a segment of their employees, but now need to make a decision to expand adoption for companywide benefit. Organizations' primary concerns are with security and cost-effective scaling.

Recommendations

Application leaders responsible for digital workplace applications that foster collaboration should:

- Select visual collaboration applications that meet organizational needs and fit into the organization's collaboration portfolio by gathering information from business stakeholders on the use cases, scenarios and processes that will benefit from richer visual capabilities.

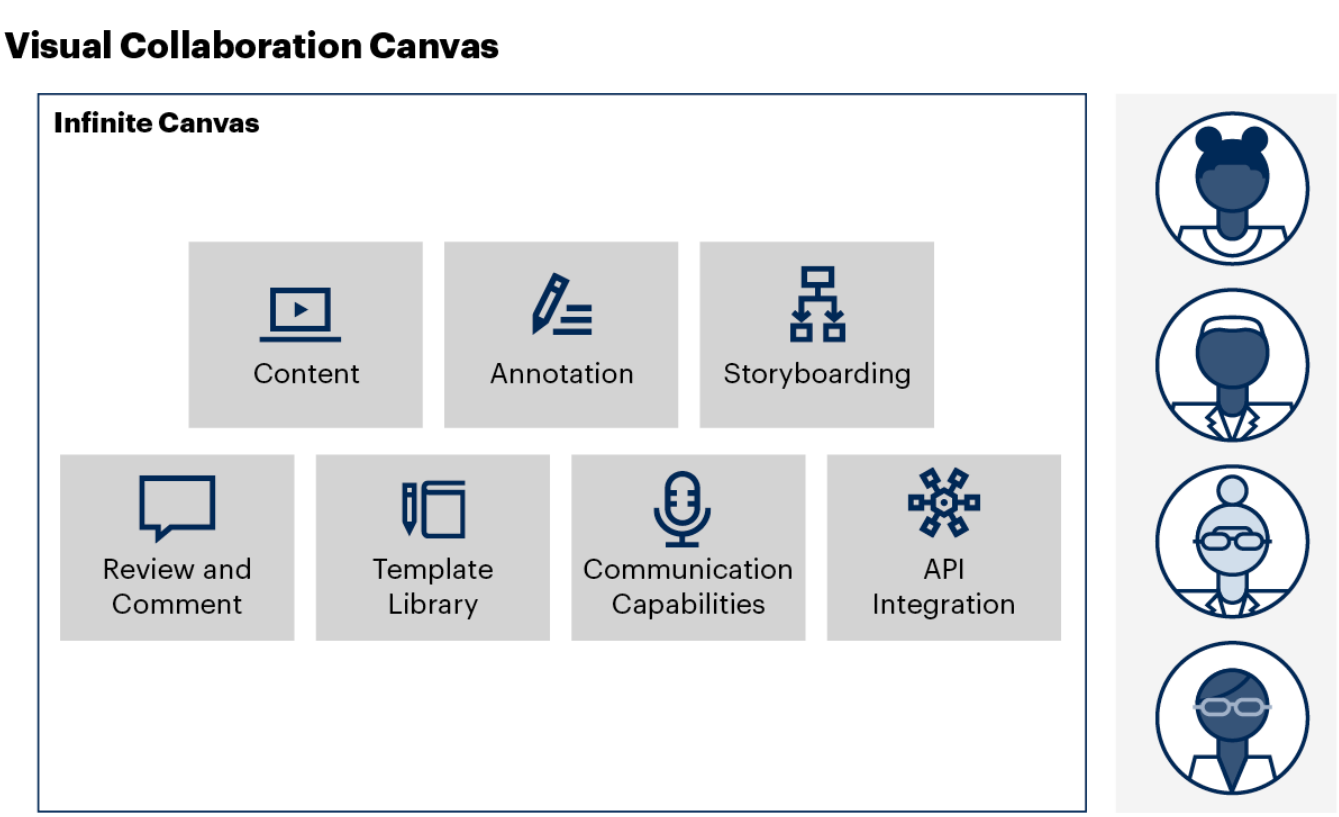
- Improve the productivity of the organization by using visual collaboration applications beyond live meetings — integrating them into creative, educational, process management and data analysis workflows.

- Seek visual collaboration applications that meet your data residency and compliance policies while supporting inclusive licensing models that allow organizations to expand adoption without suffering undue financial burden for casual access to the application.

Market Definition

Visual collaboration applications are cloud-based platforms that enable teams to communicate and creatively collaborate during both asynchronous and real-time work activities. Visual collaboration applications provide an infinitely scalable shared digital canvas offering robust collaboration features (as highlighted in Figure 1).

Figure 1: Visual Collaboration Canvas



Source: Gartner
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Gartner

Multiple users can interact on the same virtual canvas simultaneously, regardless of whether they are colocated or collaborating from anywhere via their smartphones, tablets, laptops, or conference room touchscreen monitors. These applications accept input from touchscreen devices, digital pens and

keyboards. Vendors offer these solutions as either fully feature-rich downloadable applications or as more-lightweight options accessed through browsers.

Visual collaboration applications default to a blank, free-form canvas, but often include templates for graphs, diagrams, project plans, brainstorming, mind maps, Kanban boards and other structured formats. User- and role-based access rights govern reading, editing and commenting rights for internal and external collaborators. Features to export canvasses are essential to enable sharing in various portable formats, such as PDF and JPEG. Vendors may store content in cloud infrastructure or provide server software.

Large, well-capitalized enterprise application vendors are expanding their influence in the visual collaboration application market. By the end of 2024, Gartner predicts that smaller vendors serving this technology category will either succeed with a land-and-expand approach and find a sustainable presence in enterprise collaboration portfolios, or they will be relegated to niche vendor status.

Market Description

Visual collaboration applications focus on enabling the creation and sharing of ideas graphically in a software experience using any device with a screen. This is different from other markets where, for example, content may start in one format, such as text describing a task, and thereafter be represented as a visual element, such as a card. Visual collaboration application vendors also differ from digital whiteboard vendors, which may have strong ties between their interactive hardware displays and embedded applications.

Technology vendors selling products in this market and included in this Market Guide consist of:

- Specialists with applications for particular verticalized industries, such as design, manufacturing, software product development or higher education.
- Horizontal, purpose-built platforms that serve a variety of enterprise use cases. This is the fastest-growing segment in this market.

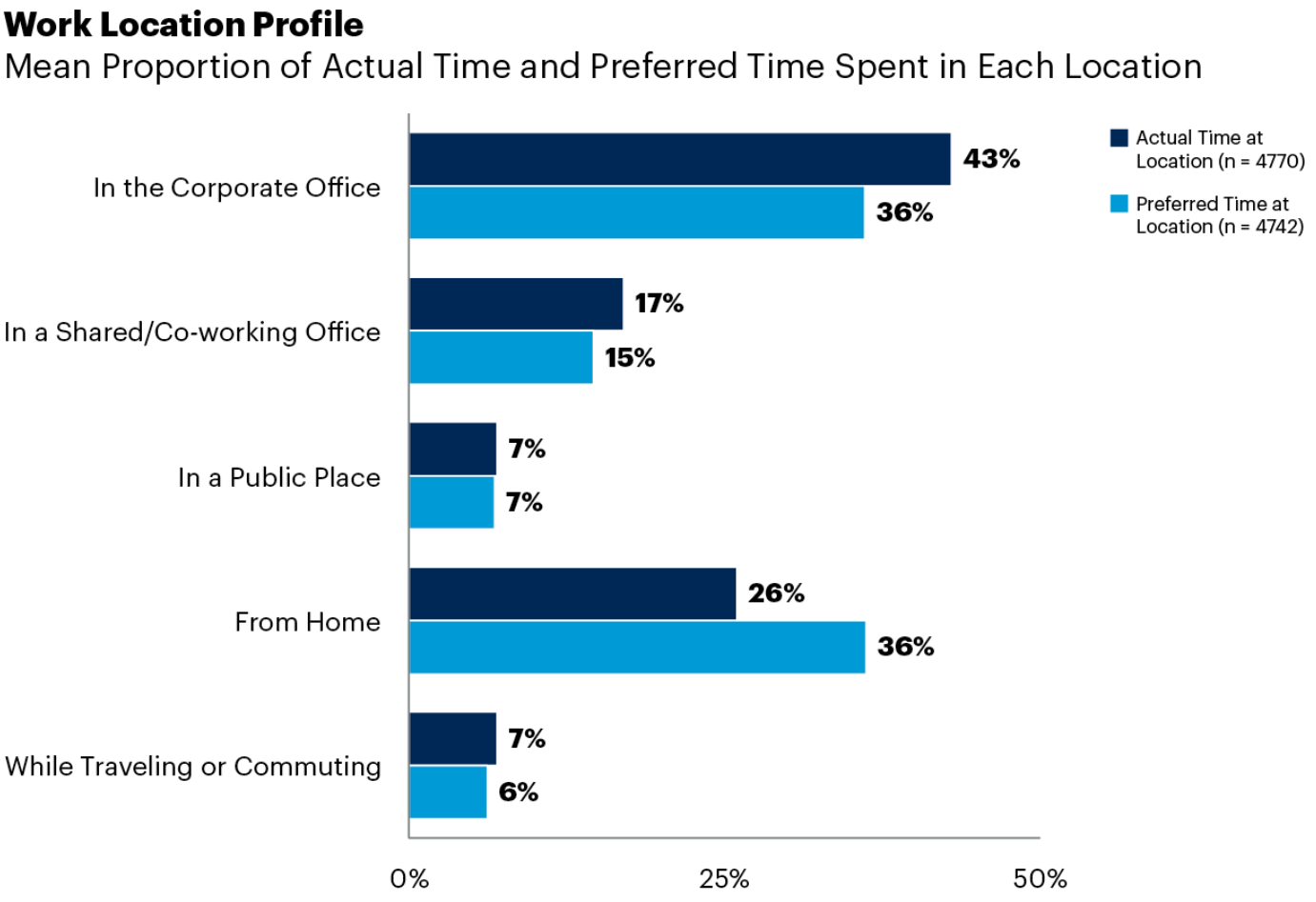
Outside this market and not included in this Market Guide are:

- Unified communication vendors that have embedded lightweight visual collaboration capabilities, such as annotation during a screen-share session.
- Hardware manufacturers that have embedded visual collaboration features (for example, digital whiteboards) on their touch surfaces. These devices are often found in briefing centers and executive conference rooms.
- Collaborative applications with visual information that can be displayed on any screen — from markets such as collaborative work management, project management, and dashboards.

Buyers develop awareness of this technology due to growing demands. There are several emerging dynamics, including (but not limited to):

- **Global dynamics create a shift toward distributed enterprise and flexible work** — Many organizations plan to continue offering their employees access to flexible work location options. This creates challenges for team collaboration and employee engagement. Demand for visual collaboration applications typically originates with certain roles (for example, creative teams, project managers and trainers) and spreads horizontally within the enterprise. As can be seen in data from the 2022 Digital Worker Survey, [1] flexible work arrangements continue to be a preferred option for many digital workers (see Figure 2).

Figure 2: Preferred Work Locations for Digital Workers



n varies; all digital workers, excluding "don't know"

Q: What proportion of time do you spend working...?, If you could make the schedule yourself, what proportion of time would you like to spend working...?

Source: 2022 Gartner Digital Worker Survey

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- **Organizations issue directives to deliver more equitable meeting experiences —** Organizations are searching for new technologies and best-practice recommendations to achieve equitable user experience, irrespective of location or device. This desired outcome enables collaborators to access all the relevant tools and resources needed to be a full contributor and to participate in decisions. Increasingly, application leaders responsible for employee experience technologies are turning to visual collaboration applications as a key element in their toolkit to deliver on the desired experience of collaboration equity.

- **Mandates for IT leaders to enable new ways of working to advance innovation —** Visual collaboration applications empower people to work in new and more productive ways. Communicating ideas without visual aids often leads to ambiguity and false assumptions. Text documents, slides and spreadsheets can help, but those artifacts are static and limited in their visual scale. Visual collaboration applications offer teams an infinitely scalable, shareable canvas, providing a far more effective platform to communicate evolving ideas across the organization.

- **Workers want to host and participate in more engaging collaboration activities —** Visual collaboration can prove useful in a variety of scenarios for many businesses. For example, this technology can provide a dynamic, interactive canvas for sales and service roles when working with their clients using online meeting services. Educators, including corporate trainers, are turning to visual collaboration applications as a platform for richer engagement with their virtual classroom attendees. Workshops benefit from a persistent visual canvas to capture and expand strategies throughout the sessions and communicate the newly developed ideas to a broader audience.

Market Direction

There has been a noticeable increase in vendors offering visual collaboration applications in recent times. This is largely due to a few factors:

- Recognition that visual collaboration applications have proven to be valuable as they aid productivity through greater accuracy and clarity in project outcomes.

- Increased demand due to the persistence of a distributed workforce.

- Expanded options for integration into a broad spectrum of popular business applications (including CRM, ERP, and digital workplace applications).

These dynamics have created a market with increasing product differentiation between the most feature-rich options and simple, lighter-weight alternatives. As this technology segment continues to see adoption growth, the vendors in this market are likely to face new competitive challenges from well-capitalized unified communications and cloud-office vendors. Several of these vendors (including Cisco, Google, Microsoft and Zoom) have already built up their visual collaboration feature

sets with the aim of achieving “good enough” status. They may follow prior product introductions by making them available at a low cost or free within their collaboration suites.

It should be noted, however, that these vendors’ visual collaboration applications trail the leaders in this market by a significant margin and may never be as complete, barring a significant acquisition.

As the market for visual collaboration applications matures, there is growing demand for enterprise-grade capabilities, with strengthened data security and compliance, and adoption enablement across the business.

Increased Focus on Data Security and Compliance

Visual collaboration applications are content creation and sharing platforms. As with other content management platforms, data security becomes increasingly important when application leaders are considering an enterprisewide deployment. Data residency, data protection, data retention and compliance with General Data Protection Regulation (GDPR) and FedRAMP are top considerations when evaluating vendors in this market space:

- **Data residency:** The requirement here is that information created on the visual collaboration application canvas should be physically stored within an acceptable regional geography. A subset of vendors in this market now offer private cloud deployments to those enterprises and public-sector agencies with the most stringent data-security sensitivities.
- **Data protection:** Information created and stored within the visual collaboration application should be safeguarded from unauthorized access, corruption or loss.
- **Data retention:** Information created and stored within the visual collaboration application should be retained within the cloud environment for a specified period of time.
- **GDPR and FedRAMP compliance:** Requires companies to clearly define their data privacy policies and ensure that personal information is not exposed to outside parties.

Inclusive and Accommodative Licensing Models

Application leaders are evaluating the expansion of visual collaboration applications adoption from domain-specific implementations to full enterprise deployment. Limited and restrictive licensing options and high prices often present significant hurdles. As with other emerging technologies, visual collaboration applications are typically offered with smaller discounts than other more mature

applications available in the market. List prices for the leading products in this segment are typically in the $15 to $25 per user per month range, and those vendors are reluctant to offer deep discounts. This can make enterprisewide rollouts for medium-to-large organizations cost-prohibitive.

The primary license types offered in this market can be described as either free, named user or enterprise agreement:

- **Free:** Free use of visual collaboration applications typically comes with limitations on the number of simultaneous participants, usage duration and the feature set. This license can be useful when only a lighter-weight usage is required, or as a starting point before making a larger purchase.
- **Named user:** Procurement purchases a specific number of licenses for discrete users in their organizations. Only the entitled users and a small number of invited guests can access the application and participate in a visual collaboration session. Others in the organization can see the canvas through a screen share option or when a snapshot of the canvas is recorded and stored as a PDF.
- **Enterprise agreement:** All users in the organization have full access and sharing rights to the visual collaboration application platform and its capabilities.

Given the price and feature disparity among the vendors covered in this Market Guide, application leaders are often tempted to consider more than one visual collaboration application to meet the various needs of the organization:

- A feature-rich named user option for teams that demand the best set of capabilities and workflow integrations.
- A lighter-weight free option that can work well for basic needs, such as drawing by free hand and using simple diagrams as a user would typically do on a conference room whiteboard.

Some of the leading vendors in this market segment adjusted their software subscription models — adopting an active user model — to lessen the cost of growing adoption among a wider range of users. While active user licenses can have the desired effect of reducing overall deployment costs, they put more burden and tension on application and procurement leaders to have a watchful eye over who is accessing the visual collaboration application. Organizations must track frequency of access and the types of activity that users perform on a shared canvas. This reality is not only a friction point for the IT and procurement organizations, it can also have a dampening effect on adoption — lessening the collaborative benefits of implementing visual collaboration technologies.

Vendors in this technology category have started to adjust their thinking on licensing and pricing. There is acceptance among some vendors that various users or roles in the organization will have a greater or lesser need to access their visual collaboration application. So they are offering greater

flexibility to address this spectrum of use through “inclusive” licensing strategies. Rather than track active use, or require discrete licenses for all employees, a few vendors are enabling application leaders to craft adoption strategies that lessen the financial risk to organically grow the implementation. An inclusive licensing approach provides full enterprise access to engage with the application’s full feature set, but the pricing is set based on an understanding of the percentage of users that are likely to be core versus casual users.

For example, take an organization has 1000 information workers. After surveying the organization, application leaders determine that:

- 25% of the organization will greatly benefit from adoption of a visual collaboration application.
- 40% will derive some limited benefit.
- 35% are uncertain about the technology and what it can do for them.

The organization would no doubt be reluctant to take the financial risk of buying 1000 licenses. Likewise, application leaders may want to avoid creating collaborative silos by buying discrete licenses to accommodate the 25% who see great benefit. However, application leaders are now seeing an opportunity through “inclusive” licensing options to negotiate a better outcome. In this example, the application leader may only need to purchase 500 licenses that give full access to all 1000 users. These users can use the application at their discretion without the need to track usage. It is, in effect, a shared risk model between the buyer and vendor, but in the end, both parties realize the desired outcome of seeing usage grow.

Portability of Visual Canvases Between Vendors

Due to the proprietary nature of all these platforms, there can be challenges when switching from one visual collaboration application to another. While a few of the leading vendors offer the opportunity to migrate canvases into their platform, there are likely to be misalignments that will require manual review and modification. This means that IT application leaders need to be proactive when making vendor selections or they will risk some user cohorts staying with their preferred visual collaboration application, thereby thwarting portfolio rationalization.

Market Analysis

Visual collaboration applications have primarily been adopted to satisfy demands from lines of business or improve collaboration within particular use cases. Flexible work conditions have created more discussion around whether physical digital touchscreen surfaces are needed in conference rooms and other group spaces. While some see benefit in creating collaborative spaces in the office, the primary objective is to deploy software-based visual collaboration applications that offer the flexibility to run on various devices as opposed to dedicated smart boards.

Figure 3 below illustrates the typical use cases that benefit from including a visual collaboration application option to workflows and technology stacks:

- Operations centers benefit from being able to better visualize data across multiple sources in a single canvas. Personnel in operations centers can more quickly analyze and correlate information, enabling more efficient and accurate root cause analysis.
- Design teams benefit from interactive co-creation and reviews across a cohort of designers from multiple locations and disciplines.
- Engineering teams benefit from the visual collaboration application acting as a hub for agile workflows, creating and reviewing wireframes, and integration into popular software repository and workstream collaboration applications.
- Educators have turned to visual collaboration applications for remote learning opportunities, offering students a multidirectional canvas to learn from teachers and peers alike.
- Presentations are often met with greater engagement and understanding when there is a live interactive experience, rather than simply relying on static slides. This is especially useful for remote selling opportunities, giving both sales teams and clients a chance to participate in information sharing and problem resolution.
- Project managers realize benefits by accessing template-based workflows and project plans. Visual collaboration software also offers the opportunity to share status updates visually in a commonly shared canvas for all interested parties to review and update.
- Internal collaboration requirements are pushing application leaders and procurement professionals to consider a broader deployment, cutting across use cases, to offer visual collaboration to a wider variety of end users.

Figure 3: Common Use Cases for Visual Collaboration

Common Use Cases for Visual Collaboration

Source: Gartner
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Gartner

The use of embedded AI capabilities is expected to emerge from the leading vendors in this market. This will facilitate ease of use and enable meaningful adoption of visual collaboration technologies across a broader spectrum of end users. These are the new features that are likely to emerge:

- Canvas assistants can build customizable storyboards, diagrams, and other graphical elements for novice users by understanding desired results (helping with, for example, project plans, process flows or root cause analysis).
- Text- or voice-activated actions to, for example, create annotations or sticky notes, or find templates on the visual canvas.
- Intelligent contextualized search for web and local content to enhance visual content on the canvas.
- Data analysis and correlation to both reveal big picture results and isolate root causes.

Representative Vendors

The vendors listed in this Market Guide do not imply an exhaustive list. This section is intended to provide more understanding of the market and its offerings.

Market Introduction

This Market Guide provides a list of visual collaboration application vendors sorted alphabetically. This list is not exhaustive, and many other vendors are active in the market. The vendors shown in Table 1 offer discrete visual collaboration applications. Other vendors in adjacent markets — such as unified communications, cloud-office suites, and collaborative work management — offer simpler digital whiteboard features as well, but these vendors are not represented in this table (see Note 1).

Table 1: Representative Vendors in the Visual Collaboration Applications Market

Vendor Name	Product Name	Headquarters
Alleo	Alleo	Carmel, Indiana, U.S.
Bluescape	Bluescape	Redwood City, California, U.S.
Collaboard	Collaboard	Zurich, Switzerland
Conceptboard	Conceptboard	Halle, Germany
Creately	Creately	Victoria, Australia
Explain Everything	Explain Everything	Ridgefield, Connecticut, U.S.
Figma	FigJam	San Francisco, California, U.S.
FlatFrog	FlatFrog Board	Lund, Sweden
Google	Jamboard	Mountain View, California, U.S.
Hoylu	Online Whiteboard	Norrkoping, Sweden
InVision	Freehand	New York City, New York, U.S.
iObeya	iObeya	Massy, France

Vendor Name	Product Name	Headquarters
Klaxoon	Klaxoon Board	Rennes, France
Limnu	Limnu	San Mateo, California, U.S.
Lucid Software	Lucidspark	Salt Lake City, Utah, U.S.
Microsoft	Whiteboard	Redmond, Washington, U.S.
Miro	Miro	San Francisco, California, U.S.
Moqups	Moqups	Cluj-Napoca, Romania
Mural	Mural	San Francisco, California, U.S.
Nulab	Cacoo	Fukuoka, Japan
Sketchboard	Sketchboard	Espoo, Finland
Stormboard	Stormboard	Edmonton, Canada
Ubikey	Ubikey	Compiegne, France
Ziteboard	Ziteboard	Budapest, Hungary
Zoom	Online Whiteboard	San Jose, California, U.S.

Vendor Name ↓	Product Name ↓	Headquarters ↓

Source: Gartner (April 2023)

Market Recommendations

Application leaders responsible for digital workplace applications that foster collaboration should:

- Select visual collaboration applications that meet organizational needs and fit into the organization's collaboration portfolio by gathering information from business stakeholders on the use cases, scenarios and processes that will benefit from richer visual capabilities.
- Improve the productivity of the organization by using visual collaboration applications beyond live meetings — integrating them into creative, educational, process management and data analysis workflows.
- Seek visual collaboration applications that meet your data residency and compliance policies while supporting inclusive licensing models that allow organizations to expand adoption without suffering undue financial burden for casual access to the application.

Evidence

[1] **The 2022 Gartner Digital Worker Survey** sought to understand workers' technological and workplace experience and sentiments. The research was conducted online from September through November 2022 among 4,861 respondents from the U.S. (n = 1,564), China (n = 1,167), the U.K. (n = 1,072) and India (n = 1,058).

Participants were screened for full-time employment in organizations with 100 or more employees and were required to use digital technology for work purposes. Ages ranged from 18 through 74 years old, with quotas and weighting applied for age, gender, region and income, so that results are representative of working country populations. We defined "digital technology" as including any combination of technological devices (such as laptops, smartphones and tablets), applications and web services that people use for communication, information or productivity.

Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

Note 1: Representative Vendor Selection

Vendor selection reflects many of the noteworthy vendors available globally, including those referenced by clients in Gartner inquiry, and highlighted by Gartner's research associates who cover this market segment.