Top 5 Trends in UC&C for 2025: Predictions for the Worldwide UC&C Market in 2025 and Beyond

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Overview and Table of Contents

- In 2024, the majority of the UC&C players worldwide continued invest in developing enhanced AI-powered capabilities as they strive to differentiate their products' capabilities drive market share growth.
- In addition, the proposition of a fully unified and integrated business communications platform grew stronger as buyers indicated a growing inclination to simplify IT administration and to deliver equitable experiences for their users and customers. Moreover, businesses continued to redesign offices, with investments particularly targeted at large or board meeting rooms during the past couple of years.
- Going forward, IDC expects these trends to continue to evolve and drive newer experiences and buying preferences.
- Top 5 Trends for UC&C in 2025:
  - AI will penetrate across business applications for holistic productivity improvements.
  - Growing preference among buyers to consolidate UC&C platforms.
  - Increasing demand for integrated UC-CE platforms.
  - Integration complexities will push UC&C players to enter new spaces.
  - Early adoption of AI-powered meeting room features.

Trend 1: AI will penetrate across business applications for holistic productivity improvements.

UC&C players are now expected to move beyond basic transcription and summarization capabilities and focus on enabling contextual content generation.

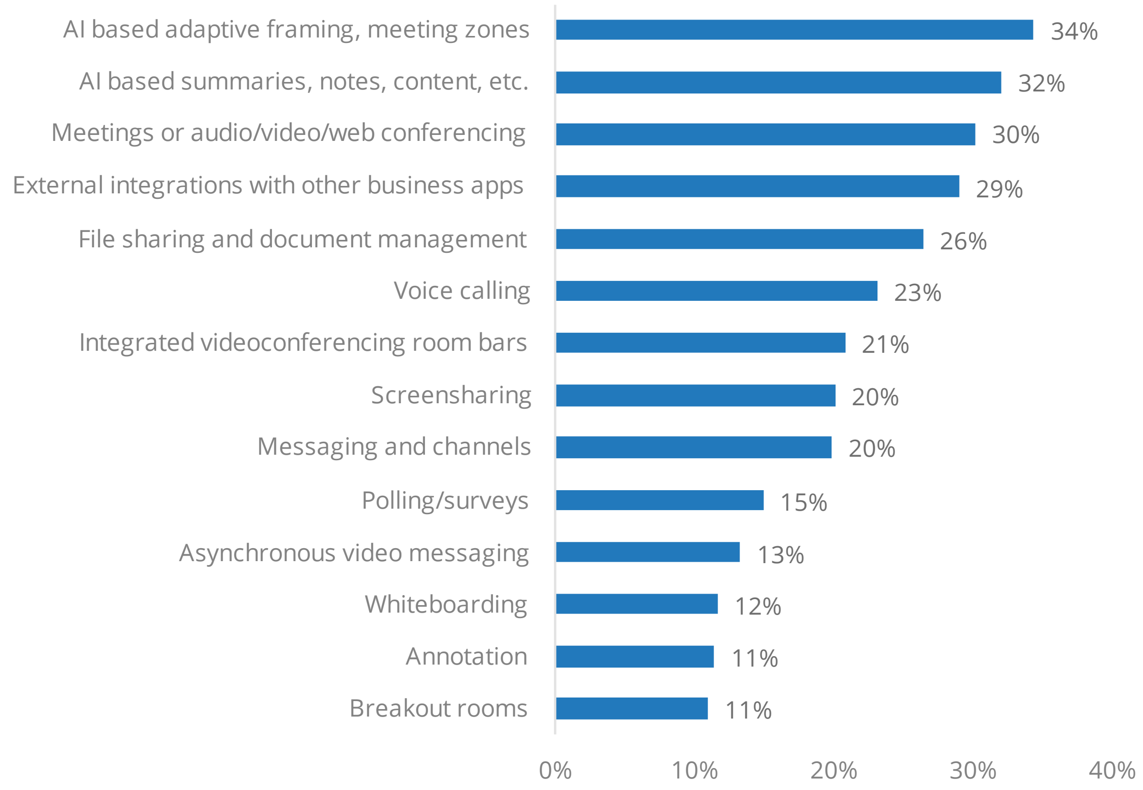
Trend 1: AI will penetrate across business applications for holistic productivity improvements.

AI capabilities — both platform and device based — are now top of the mind for UC&C buyers.

Key drivers:

- AI-based transcriptions, summaries, and notes will become table stakes as businesses look to incorporate AI across business applications and drive productivity via automated content generation including drafting of emails, documents, and creation/analysis of presentations and spreadsheets.
- Such capabilities enable enhanced meeting experiences and leveraging of proprietary business information to generate contextual and personalized content ranging from company policies and guidelines to marketing material and management reports.
- Indicators:
- UC&C vendors introduced several unique AI capabilities in 2024. For instance, Cisco launched virtual meeting zones (blocks out audio/video beyond a predefined meeting area), AI Codec for Meetings (uses AI to complete garbled sentences caused by network issues), and spatial meetings with Apple Vision Pro.
- Similarly, Zoom introduced AI Companion 2.0 which can help create and manage Tasks across Zoom Workplace apps and generate AI-based content in Docs by leveraging meeting and other company data.
- IDC's recommendations:
- UC&C players must ensure their AI initiatives expand beyond meetings and into office productivity applications and other platforms such as CRM to enable custom use cases for content generation. Standalone AI meeting capabilities will not help differentiate the product from competition.

Figure 1*: Top 3 UC&C capabilities driving UC&C purchase decisions



Source: IDC's Cloud Communications and Datacenter Services Survey, August 2024 (n = 427)
Note*: Each bar in Figure 1 represents the percentage of respondents that chose each of the UC&C capabilities listed as one of their top 3 capabilities they'd look for if they were to buy a UC&C solution.

Trend 2: Growing preference among buyers to consolidate UC&C platforms.

Buyers want to reduce the number of communication platforms they use, and in response, vendors are enhancing the flexibility of their platforms through better interoperability and expanded portfolios.

Trend 2: Growing preference among buyers to consolidate UC&C platforms.

The need for standardization of employee and customer experiences, and easier IT administration is pushing businesses to move to providers that can cater to all their business communication needs.

Drivers:

- 64% of the organizations consider it important to consolidate UC&C providers and instead work with a single unified platform for all business communications.
- Of these, 51% each say they want to consolidate the number of UC&C providers they use to firstly, improve uniformity in experiences delivered to employees and customers and secondly, for easier administration and IT management.

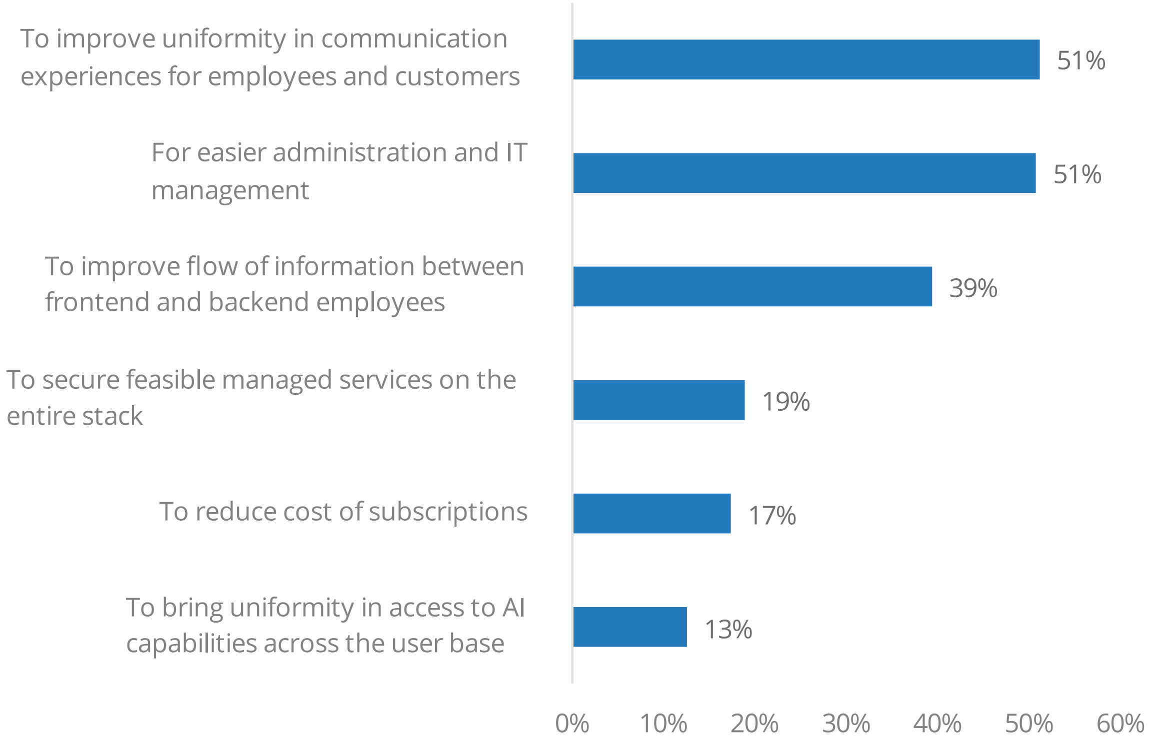
Indicators:

- For UC&C users, customer and employee communication use cases are equally important. Organizations report that 51% of their communication use cases are employee-to-employee while the rest are with customers and external audiences including suppliers, prospective hires, and event/webinar attendees.
- To cater to all these use cases, UC&C players are continuously enhancing interoperability with third-party UC&C platforms, devices, and other business tools, in addition to enabling BYOC for flexibility in voice calling capabilities.

IDC's recommendations:

- UC&C vendors need to build holistic business communication capabilities to offer a complete platform while ensuring enhanced interoperability with third-party platforms to offer maximum flexibility to end users.

Figure 2 (% organizations): What are the top two reasons for your organization to consider it important to consolidate the number of UC&C providers it uses?



Source: IDC's Cloud Communications and Datacenter Services Survey, August 2024 (n = 272)

Trend 3: Increasing demand for integrated UC-CE platforms.

Buyers are demanding unified employee and customer communication platforms that can deliver on the needs of both use cases in a common, connected interface.

Trend 3: Increasing demand for integrated UC-CE platforms.

More than half (52%) organizations want some contact center capabilities baked into their UC&C solution, pushing vendors to launch integrated unified communications (UC) and customer engagement (CE) offerings.

Key drivers:

- Traditionally, there has been a clear distinction between platforms used by contact center agents and employees at the backend. However, this distinction is gradually fading away as organizations realize the value of having a common platform for all communications.
- 55% of the organizations surveyed by IDC say that the primary reason they need their UC&C platform to offer basic contact center features is to remove disparity between different platforms, which hampers flow of information between customer-facing employees and others at the backend.

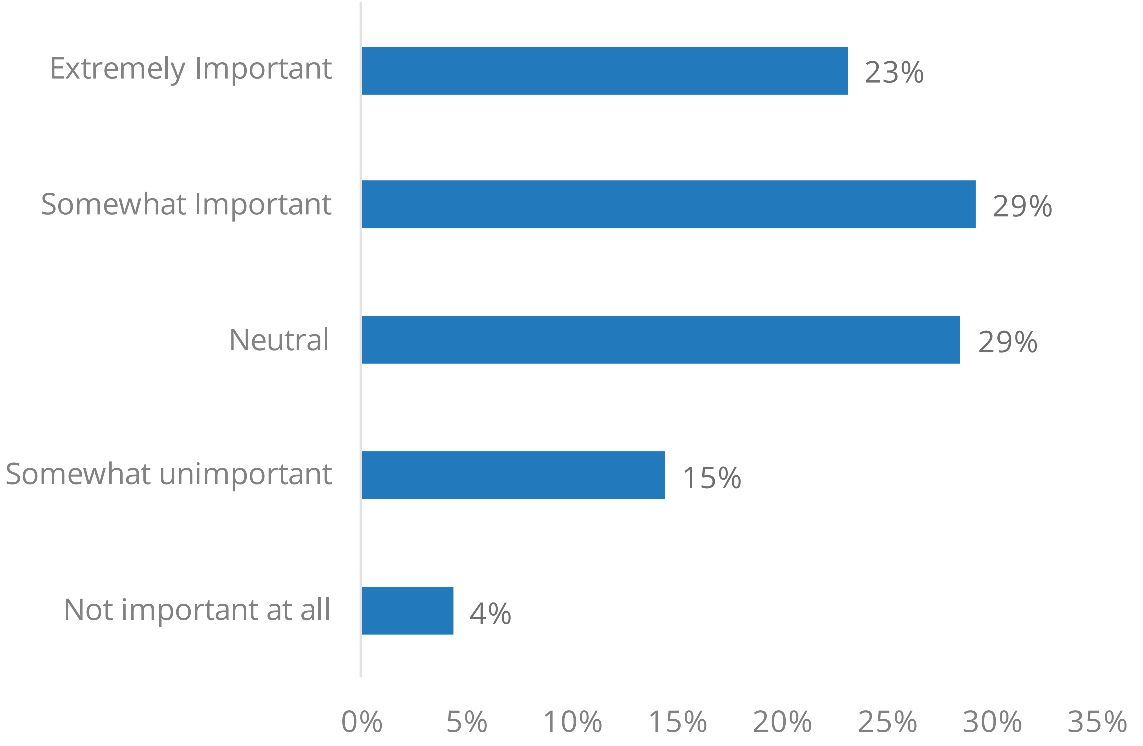
Indicators:

- While some vendors have launched dedicated UC-CE offerings priced independently, others are offering well-marketed integrations and/or customizable bundles for integrated employee and customer communications.
- For instance, 8x8 has progressively advancing contact center capabilities included in its offering plans, Vonage has a separate offering called Vonage Fusion for UC-CE, and Mitel recently launched Mitel CX to this effect.
- In contrast, other vendors offer contact center features as an add-on; for example, Microsoft offers the Queues App and Zoom offers the Zoom Phone Power Pack.

IDC's recommendations:

- Deliver integrated experience – whether through seamless integrations of separate platforms or natively in a single platform.

Figure 3 (% organizations): How important is it for your organization that its UC&C solution has some in-built contact center capabilities?



Source: IDC's Cloud Communications and Datacenter Services Survey, August 2024 (n = 427)

Trend 4: Integration complexities will push UC&C players to enter new spaces.

Strictly communications-focused UC&C providers will need to explore new, AI-powered collaboration use cases.

Trend 4: Integration complexities will push UC&C players to enter new spaces.

Vendors will strive hard to expand their portfolios with more collaboration applications.

Key drivers:

- The business applications ecosystem has become too convoluted for organizations to manage effectively and getting multiple platforms and applications to work together seamlessly with each other is their biggest concern.
- While integrations and interoperability via APIs helps, there is constant room for improvements in making it seamless and ultimately that leads to IT overload.

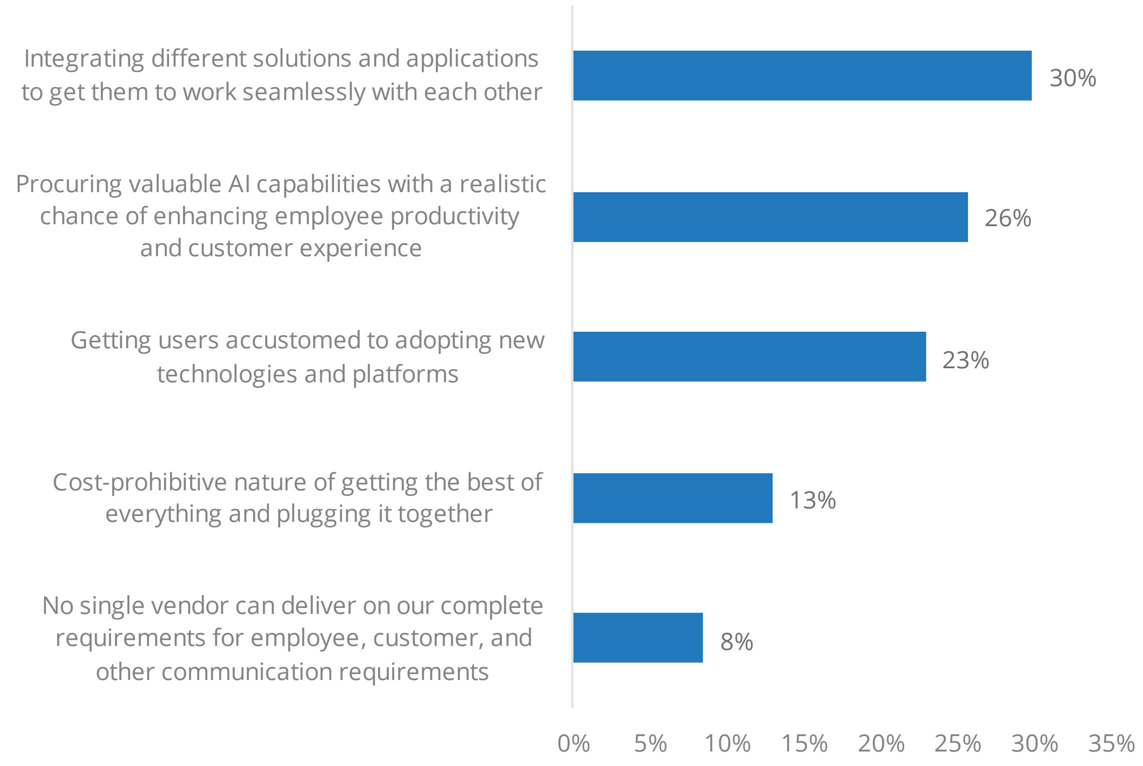
Indicators:

- Over the past few years, UC&C vendors have expanded their scope of adjacent services through strategic partnerships, and organic or inorganic addition of contact center, employee engagement, and workspace reservation platforms.
- For instance, Zoom acquired Workvivo, Cisco acquired Slido, Splunk, and BabbleLabs, and Mitel and Avaya partnered with Zoom for expansion into new services or expansion of capabilities delivered to clients.
- Further, vendors enhanced AI and security capabilities and formed tight integrations with office productivity applications and other CRM and IT service management applications.

IDC's recommendations:

- UC&C vendors that are strictly focused on UC and contact center platform capabilities will need to expand their scope to compete effectively with the ones that offer everything under one roof, from conducting meetings to getting work done especially using AI.

Figure 4 (% organizations): What is the most critical problem your organization faces or has faced while adopting a UC&C solution?



Source: IDC's Cloud Communications and Datacenter Services Survey, August 2024 (n = 401)

Trend 5: Early adoption of AI-powered meeting room features.

Over the last two years, majority of the businesses have invested in upgrading their office facilities, particularly the large or board meeting rooms. Going forward, IDC expects the larger rooms to witness increased adoption of AI-powered capabilities.

Trend 5: Early adoption of AI-powered meeting room features.

66% organizations redesigned or upgraded their office facilities with new UC&C hardware during the past 2 years, and majority of the remaining consider it important to upgrade soon.

Key drivers:

- During the past two years, more than a third of the businesses each increased their inventory of huddle rooms (34%), and small and medium rooms (36%). In contrast, only 27% increased the number of large or board meeting rooms in their offices.
- However, 62% of those organizations that upgraded their facilities invested in large or board meeting rooms while fewer invested in huddle, small, and medium rooms. AI-powered capabilities will likely penetrate deeper into large meeting spaces in 2025.

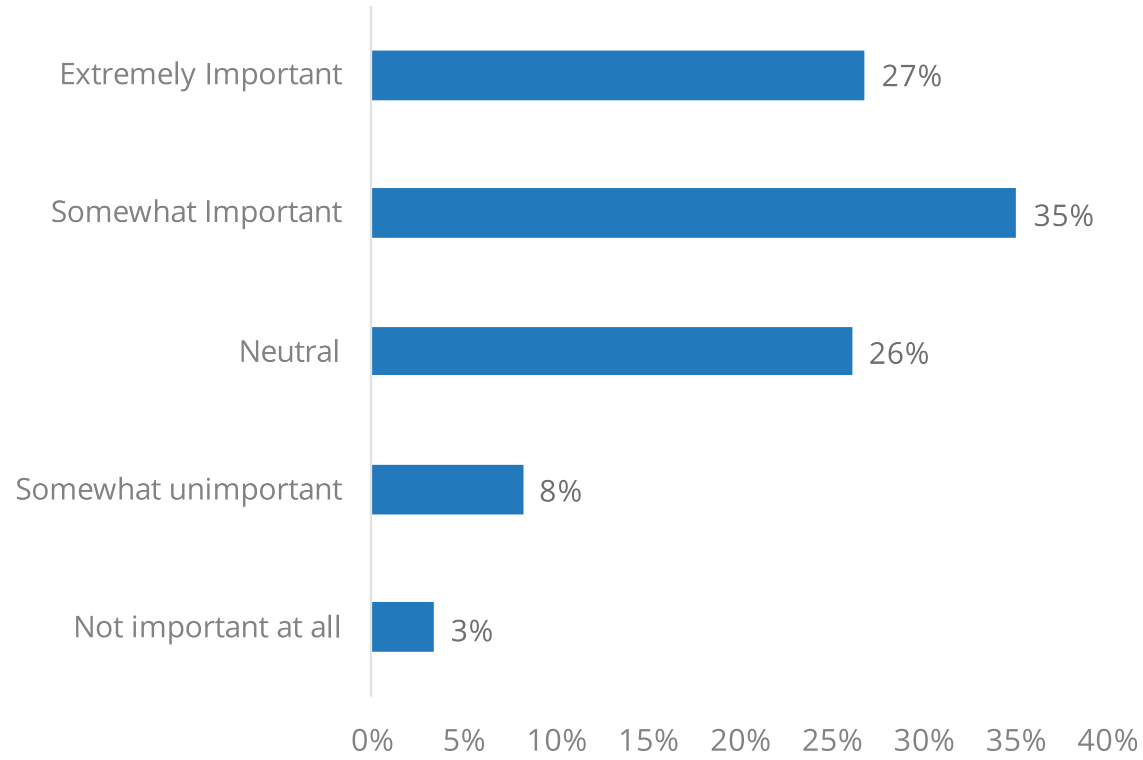
Indicators:

- UC&C vendors introduced several AI-powered meeting room features during 2024. For example, Zoom Rooms showcased smart name/speaker tags, smart gallery (splits feed from a single camera into individual user frames), and intelligent director (for equitable share of screen using multiple cameras).
- Similarly, Cisco introduced cinematic meetings (participant tracking), meeting zones, transcriptions for individual participants dialing in from a single meeting room device, and various room/device management controls.

IDC's recommendations:

- AI in physical meeting spaces should initially be targeted at large meeting spaces and across specific verticals such as education and healthcare where equal share of attention, in-person meeting transcriptions, and automated notetaking would be highly valued.

Figure 5 (% organizations): How important is it for your organization to redesign or upgrade its office facilities with new UC&C hardware?



Source: IDC's Cloud Communications and Datacenter Services Survey, August 2024 (n = 145)

For More Information

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