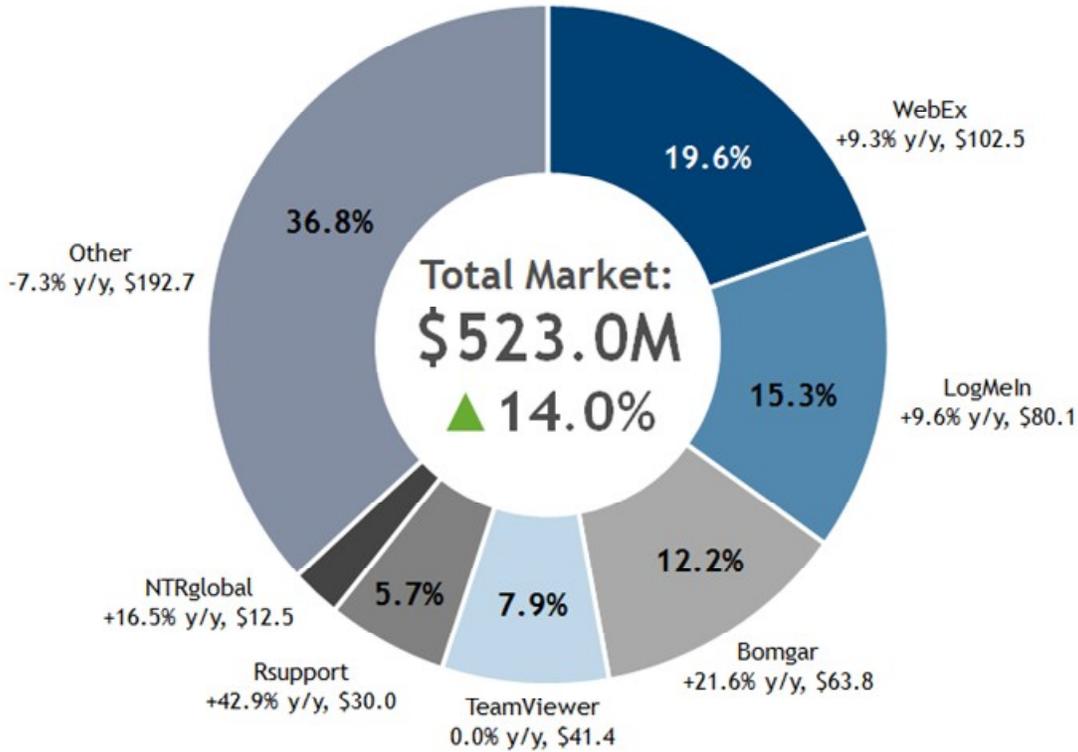MARKET SHARE

Worldwide Clientless Remote Support Software Market Shares, 2014: Top 6 Market Share Leaders

Rob Brothers

IDC MARKET SHARE FIGURE

FIGURE 1

Worldwide Clientless Remote Support Software 2014 Share Snapshot

Note: 2014 Share (%), Growth (%), and Revenue ($M)

Source: IDC, 2015

EXECUTIVE SUMMARY

This study reviews the market share leaders in the clientless remote support software market. This market is currently dominated by a few key market participants. IDC notes the following trends in the hardware support and deployment services market:

- **Growth in the market.** The market grew approximately 14%, with Rsupport and Bomgar seeing significant gains at 43% and 22%, respectively, while WebEx remains the market leader.

- **Video capabilities.** LogMeIn and Citrix have ventured into the video-based support options, allowing technicians to stream content to other technicians and capture it for documentation purposes.

- **Quick-fix technologies.** As enterprise and small and medium-sized business (SMB) employees increasingly leverage mobile devices both in and outside the office, the need for not only mobile remote support but also immediate resolution becomes critical. LogMeIn, for instance, includes a feature called Click2Fix in its Rescue clientless remote support solution. Click2Fix enables one-click fixes for common mobile device concerns such as firmware issues, battery optimization, and malware detection. IDC expects more vendors to develop this type of technology going forward.

- **Internet of things (IoT).** It's not just edge devices that are included in the IoT, the new Lens abilities in LogMeIn and Citrix SeeIt are allowing technicians that repair any type of device (e.g., think engines, power and cooling, or appliances) the technology to bring in other resources when needed in a simple yet robust fashion.

Google's announcement of Brillo "underlying operating system (OS) for the Internet of things," the android operation system for smaller devices (think IoT stuff like sensors and Nest being a good example), will make for some great opportunities for these software support-based tools. As the current market for IT tools continues to mature, look for these companies to broaden their reach into new verticals such as medical and industrial.

This IDC study presents the top 6 market share leaders for 2014 in the worldwide clientless remote support software market.

"Remote clientless support vendors understand how to target the IT and, in particular, mobile device and market," says Rob Brothers, program director for IDC's Software and Hardware Support Services practice. "The next step for these vendors is to expand to the Internet of things (IoT); adding features and functionality to the existing offering is great, but the players that will differentiate will open new markets."

ADVICE FOR TECHNOLOGY SUPPLIERS

The market for clientless remote support solutions is beginning to experience platonic shifts. Legacy solutions such as Cisco's WebEx and NTRglobal's solution have essentially remained the same since at least 2012, while others such as Bomgar and LogMeIn's Rescue have experienced numerous innovative iterations during that time period. Further, solutions that have previously been marked as "second tier" are beginning to break into "first tier" status, with TeamViewer being the best example of this. IDC believes the top vendors will need to take the following actions in order to maintain their dominance:

- **Develop innovative approaches or become irrelevant.** The harsh reality is that only the most innovative companies in the clientless remote support space will not only remain competitive but survive. Specifically, this means developing solutions that address customers' needs around mobile support, immediate tier 1 issue resolution, and an intuitive user experience.

- **Expand partnerships with enterprise mobility vendors.** As the conversation around clientless remote support goes from the support to PCs and Macs to Android and iPhones, clientless remote support vendors have an opportunity to partner with mobile enterprise vendors in the mobile enterprise management (MEM) space to enhance the security of their support solutions. Further, partnerships with mobile OEMs will be a key go-to-market strategy, with Rsupport's nascent partnership with Samsung being an example of how this can be effective.

- **Look to expand the toolsets outside the IT domain.** There are many other verticals, some of which are manufacturing, power and cooling, oil/gas, and healthcare (in particular, medical devices) that could benefit from remote-assisted tools.

- **Develop relationships with support providers.** It's difficult at best to reach SMBs from a marketing perspective, understanding that, the use of partners is a great way to penetrate that space. Make the offering transparent or "white box" so partners can customize it and sell it as their own. The device support and management market for service providers creates an excellent revenue stream and is very important to their bottom line.

Advice for Customers

As businesses allow employees to utilize "any" device, and subsequently as the number of employees working remotely increases, remote clientless support tools will become a necessity. Likewise, as the trend toward IoT continues, more devices will become equipped with remote capabilities that are more advanced and powerful from a business standpoint of delivering data real time. Losing the ability to remotely fix these devices becomes a liability for the employee and can cost the organization in terms of lost productivity and potentially lost data. New working locations outside of the office, a plethora of powerful devices in numerous form factors, and a need for consistent productivity and sensitive data protection all create a basis for a clientless solution to become the optimal method for support within the enterprise.

The enterprise can easily dispatch a technician to fix an issue for a locally based employee or device. However, that option becomes significantly less feasible for remote employees and devices. As a result of this, traditional telephone support for a device issue has become a common practice for enterprise help desks. Given this is both time intensive and frustrating for the help desk technician, IDC expects that the trend for enterprises will be to move away from this mode of support toward employing remote control solutions. Furthermore, companies are increasingly shifting toward clientless solutions that offer a better fit for remote devices and employees. Since new offerings require no software to be installed onto the device, the enterprise saves time and resources and the device can

remain unaltered. These tools can help create operational efficiencies for help desk providers, allowing them to do more with less and provide the ability to work on more pressing business issues instead of the mundane tasks of support.

MARKET SHARE

Market Share Leaders

The top 6 clientless remote support software tools providers in 2014 are shown in Table 1 and Figure 2. In 2014, WebEx and LogMeIn were the number 1 and 2 market share leaders, respectively.

Because of TeamViewer's all-inclusive nature of the product, IDC has taken a portion of the revenue to dedicate toward support.

TABLE 1

Worldwide Clientless Remote Support Software Revenue by Top 6 Vendor, 2013 and 2014 ($M)

| Rank | Company | 2013 | | | 2014 | | | |
		Enterprise	SMB	Total	Enterprise	SMB	Total	2013–2014 Growth (%)
1	WebEx*	26.0	67.8	93.8	28.4	74.1	102.5	9.3
2	LogMeIn	29.2	43.8	73.1	44.0	36.0	80.1	9.6
3	Bomgar	36.1	16.3	52.4	44.9	18.8	63.8	21.6
4	TeamViewer*	–	–	–	2.1	39.4	41.4	NA
5	Rsupport	12.6	8.4	21.0	15.0	15.0	30.0	42.9
6	NTRglobal*	4.1	6.6	10.7	4.8	7.7	12.5	16.5
7	Other**	73.7	134.0	207.7	68.0	124.7	192.7	-7.3
		181.8	277.0	458.7	207.2	315.7	523.0	14.0

* IDC estimate

** In 2013, TeamViewer was represented in the "other" category; the company is now reported in this study. Citrix, however, is not reported in this study (see *Worldwide Clientless Remote Support Software 2013 Vendor Shares: Top 6 Market Share Leaders,* IDC #249460, June 2014) and is now estimated in the "other" category for 2013 and 2014. This is why we see negative growth in the "other" category.

Source: IDC, 2015

FIGURE 2

Worldwide Clientless Remote Support Software Revenue Share
by Top 6 Vendor, 2014
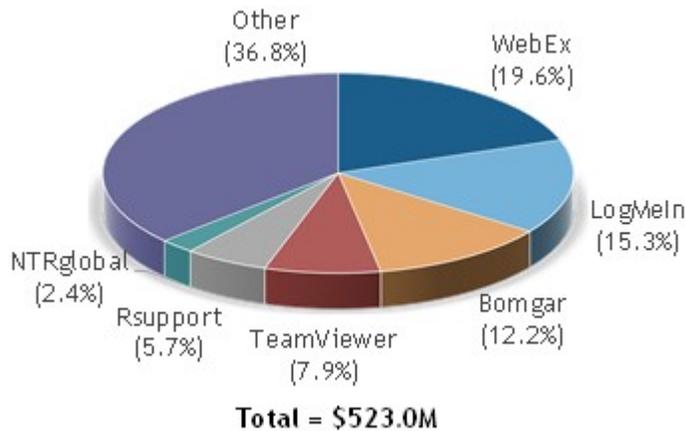
Source: IDC, 2015

WHO SHAPED THE YEAR

LogMeIn

In 2014, LogMeIn hit the number 2 position in the clientless remote support software market, with 15.3% total market share. The company experienced good year-over-year growth for its clientless remote support product, Rescue, with total revenue for this product at approximately $80 million in 2014. To start differentiating itself, LogMeIn is targeting the IoT market space and utilizing the functionality of Lens to do so. The product is targeted at a number of verticals, including healthcare, technology, education, and telecom. Lens enables technicians to troubleshoot issues as if they were physically onsite themselves, or to collaborate with other team members if they themselves are onsite. This feature also allows customers to solve issues that they would otherwise have to call a professional to fix, saving them time and money. These features add a great deal of benefit to both the technician and the customer alike. These benefits include:

- Reduced time needed to diagnose or troubleshoot issues that may be difficult to explain over the phone, and provide guided instructions such as wiring procedures, model and serial number locations, or assembly instructions
- Persistent on-screen customized prompts that enable technicians to identify specific components or problem areas quickly to the customer
- Record and log sessions for later reference
- The ability to assist a larger volume of customers in a shorter period of time, not only increasing technician productivity but also reducing customer wait times – potentially increasing customer satisfaction

LogMeIn Rescue Lens is a smart and natural evolution of the Rescue remote support portfolio and was initially made available for iOS, iPad, and Android devices in April 2015. Extending remote viewing support capability through the use of mobile devices provides support technicians with a broader set of

options when assisting customers or onsite technicians. It is not surprising that LogMeIn has included this feature into Rescue given its success in the desktop remote support market and underscores LogMeIn's "Support of Things" campaign as an extension of its Xively IoT platform. The whiteboarding capability of Lens gives LogMeIn a leg up on its competitors with similar offerings but should stay aggressive and consider adding Windows support to Lens on the horizon of the Windows 10 release. Nevertheless, Rescue Lens is an innovative and useful remote support tool and is a thoughtful addition to the ever-growing IoT market, solidifying LogMeIn as an early innovator in this space.

One of Rescue's other intriguing features is Click2Fix, a tool that permits one-click fixes for common mobile device issues. Features include remote control and view, which allows the technician to see the user's device and use a whiteboard, laser pointer, screen capture and recording tool, and more. An alert bar displays notifications of application, battery, or firmware issues, and a battery optimization feature pushes settings to optimize battery life. Click2Fix also incorporates a predefined Access Point Name (APN) push functionality, radio toggles for connections such as Bluetooth or WiFi, and URL push, which sends a URL to an end user's device. This proactive guidance is designed to reduce support costs and processes. Click2Fix also checks the user's device to ensure the OS is updated and that there are no harmful apps or malware issues on the device.

Rescue enables the support of PCs, Macs, smartphones, and tablets, including iOS, Android, BlackBerry, and Windows Mobile devices. The solution enables technicians to remotely configure iOS and Android connectivity settings, including WiFi network setup and APN settings

Bomgar

Bomgar focuses exclusively on internal employee or external customer remote support technology, with a sweet spot at the enterprise level. In 2014, where they still are the dominant player, Bomgar saw revenue of approximately $63.8 million, which represents a 21.6% increase over 2013 revenue. Bomgar is third in the market share leader's list, but number 1 in enterprise.

Bomgar's solution is unique in that it is offered as either a physical or a virtual appliance and now in the cloud, meaning the solution can reside either within a customer's firewall or outside of the firewall in a secure cloud deployment. Customers have been seeking the inclusion of specific enhancements in the latest Bomgar offering, which includes new features such as Jump Client Access Schedule. This feature provides more granular control over who has access to systems as well as when those systems can be updated. With Jump Client Access Schedule, organizations can now set specific days and times when internal IT staff and external vendors can remotely access various systems. For example, third parties may be limited to accessing and updating systems during evening or early morning hours when they're less likely to impact business productivity. A good example would be the repair of kiosks; repair of these during normal business hours may impede a customer from processing a transaction, which can leave a customer dissatisfied with the kiosk experience.

In addition, support reps can work on issues "offline" or without needing to screen share through Remote Registry Editor and System Information Actions. This allows the customer to continue work as usual while the support rep works on the system in the background, an extremely important tool to minimize productivity loss. This is key for workers in areas where connectivity is consistently a concern. Bomgar's new Rep Console Device Verification feature adds an additional security layer that allows organizations to control where rep consoles are used. Administrators can now define and enforce which networks and on which devices the representative console may be used. As an example, internal support reps may be allowed to use Bomgar from their company-issued iPad, but not

from their personal Android phone. And a third-party rep may be limited to using Bomgar only from his/her own company network, not when working from home or a coffee shop.

Utilizing a technology normally found only on servers, Bomgar's new Wake-on-LAN (WOL) support feature allows technicians to remotely support computers, even when they are turned off or powered down for energy saving. By sending WOL packets to a Bomgar Jump Client, the support representative can wake the computer and resolve issues without traveling onsite, enabling IT to support more computers in a variety of scenarios. Additional features in Bomgar 14.2 include:

- Centralized Rep Console Settings
- Delegated Password Administration
- Rep-to-Rep Screen Sharing
- Configurable Jump Client Installer
- User Account Details Reporting
- Multi-Team Jump Client Access
- Overflow Routing Rules

Bomgar has a very good understanding of its customer needs and continues to enhance its product to make it more robust and easier to use. IDC believes that Bomgar will need to expand its offerings in the IoT space and in the application layer to continue strong growth in the future. As the remote support market matures and market share stabilizes, the ability to move the product into other market segments to drive growth will be essential. Bomgar is well positioned to make that transition and should continue investing in R&D to reap the benefits of these emerging growth markets.

Bomgar also enables integrations with identity management and authentication tools and includes over 50 permission controls within the solution that can be administered either to individual employees or through group policies. Bomgar's technology captures a full audit trail plus a video recording of each session for either compliance or training purposes. Bomgar's solution supports Windows, Mac, iOS, Android, BlackBerry, Windows Mobile, and Linux platforms.

Cisco WebEx

Cisco's subsidiary WebEx sits behind Citrix as the largest vendor in the clientless remote support market, with 19.6% of the total market share in 2014. Cisco is providing expanded reach to more countries with updated language support across the WebEx portfolio since the latest version of our forecast (see *Worldwide Clientless Remote Support Software 2013-2017 Forecast,* IDC #244467, November 2013). WebEx offers a compelling suite of remote access and remote control tools, including WebEx Meeting Center for Web conferencing, WebEx Event Center for webinars, WebEx Training Center for online training, and WebEx Support Center, the company's clientless remote support offering.

WebEx Support Center is designed to address a number of different technical support needs. Product features include WebACD Queue Manager, which enables automated, rules-based call distribution, and WebACD Manager Dashboard, an analytics engine that gives administrators insight into both technical support activity and productivity metrics. Further, WebEx Support Center can be integrated with VoIP, videoconferencing, and teleconferencing tools, in addition to CRM applications via open APIs. WebEx Support Center is delivered through the Cisco WebEx Cloud, which provides a simple installation process for end users.

TeamViewer

New this year to the study is TeamViewer. While most competitors offer different packages for support, server administration, home office, presentations, meetings, online training, and teamwork, TeamViewer combines all of these modules into a single application. Because of this nuance, IDC has taken a portion of its overall sales of $125.6 million and assigned $41.4 million of that to clientless support. TeamViewer has taken a more holistic approach in its offering by providing a broad spectrum of capabilities that appeal to service providers (SPs) and SMBs. SPs have the ability to add their own logos and customize the product to suit their needs and those of their customers. Some features in the product set are:

- **Wake-on-LAN:** Wake up computers remotely whenever access is needed.
- **Windows system service:** Install TeamViewer as a Windows system service to access remote computers directly after Windows starts and before Windows log-in.
- **Remote reboot:** Restart computers remotely – even in safe mode.
- **MSI package:** Distribute TeamViewer in your domains using an MSI package.
- **Central device management:** Use policy-based settings for all TeamViewer installations.
- **Windows authentication:** Use Windows log-ins as an alternative to log into the remote computer.
- **Computers & Contacts:** Provide you with a list of colleagues who are available to assist with an issue – connect with just one mouse click.
- **Remote printing:** Print documents from remote computers – without having to transfer files.
- **Automatically log out:** No unintended access to the Mac or Windows computer that were just connected to (The remote computer is automatically locked instantly if the connection is closed or interrupted.)
- **Monitoring checks:** Monitor devices remotely to oversee important hardware and software status updates.

TeamViewer offers RSA 2048-bit public/private key exchange and AES 256-bit session encryption to ensure that session data is very secure. Two factor authentication adds an additional security layer to protect TeamViewer accounts from unauthorized access and allows you to get HIPAA and PCI ready. These features sets have helped TeamViewer secure some very high-profile accounts. Look for TeamViewer to expand its presence with the new management team in place.

NTRglobal

NTRglobal, an ASG company, designs solutions that are built specifically for the IT services and desktop management markets. The company, headquartered in Barcelona, Spain, was founded in 2000 and services over 17,000 companies. NTRglobal had revenue of $12.5 million in 2014, based on new guidance, and is in the sixth position in terms of overall market share. The majority of NTRglobal's customer base is still located in Europe, and the company is realizing some of its fastest growth in North America.

NTRglobal focuses on enabling solutions for enterprise-level IT customers. The company's solution is built on a SaaS platform and has two primary product offerings: NTR Cloud and Support Ultimate. NTR Cloud comes in three different flavors: NTR Cloud for ITSM, NTR Cloud for Help Desk, and Free Cloud. Both of these offerings provide IT automation and remote systems management, and hence much of the functionality of these technologies would be covered within IDC's PC, device, and IT

service management practices. From a mobile standpoint, NTRglobal provides support to a couple of platforms within its Support Ultimate offering. NTR Chat, a one-click messaging tool within Support Ultimate, provides support to BlackBerry and Android devices.

Rsupport

Rsupport, founded in 2001, provides remote support solutions for PCs and Apple products, as well as other mobile devices. The company develops its technology for both SMB and enterprise organizations. In 2014, Rsupport saw growth rates of 43% and currently sits in the fifth position for overall market share.

Rsupport's remote support solution is RemoteCall. Key features of the solution include a queue system to manage customer requests to specific agents, an instant chat tool, canned messages for more efficient responses, and video chat functionality. RemoteCall Enterprise is another offering from Rsupport and includes additional features such as support team setup, call distribution policy control, and customer queuing to enable customers to reserve a time for a callback in case technicians are unavailable. RemoteCall Pro, a third offering from Rsupport, includes additional features such as drag-and-drop file transfers, service reports, whiteboard tool, and remote printing.

Rsupport also offers RemoteCall Appliance, which is a plug-and-play solution that is designed for standard rack server environments. In addition, Rsupport offers RemoteCall + mobile pack and RemoteCall + visual pack. RemoteCall + mobile pack supports Android and Windows Mobile in the same way as the PC support method. RemoteCall + visual pack is a real-time communication service that enables specific objects or environments to be shared visually using a smartphone's camera via cellular connection or WiFi. Rsupport also recently announced news that its solution will come pre-installed on Samsung Galaxy NotePRO and TabPRO tablets.

More than 5,000 organizations around the world leverage these solutions to help optimize their operations. Rsupport's global headquarters and R&D center are located in Seoul, South Korea, with branch offices in Tokyo, Beijing, and New York City.

Others

Citrix

Citrix, as in past years, has continued to build momentum with solutions that address users' needs from a social, mobile, and cloud perspective. One of the newer features, SeeIt, enables the customer or technician seeking assistance to quickly share video, during a remote support session via their Android device, of whatever they need support for – whether it's software, hardware, or even applications outside tech (industrial equipment or home repair). The technician can immediately see the issue – no time wasted with sending/texting images. And for Samsung devices, the customer and tech can switch from camera share (the video option), screenshare, and chat on the phone during a remote support session to collaborate best during the resolution.

Including cloud-based help desk functionality within the Citrix, remote support portfolio is a natural progression for the company. This should provide customers a cohesive solution that will allow a technician the ability to open tickets automatically when support issues do arise and close them upon completion hence saving time in the process. The challenge for Citrix will revolve around its ability to market and cross-sell the portfolio to the existing customer base. Most companies have made investments in personnel and tools to enable help desk capabilities, getting them to switch may prove

difficult. Citrix will also need to integrate the solution as smoothly as possible into their existing cloud offering, providing the customer with a cohesive solution that is easy to navigate and use.

Growth in this space is still fairly significant and with IoT support needs heating up look for other companies and other markets to open.

MARKET CONTEXT

The need for remote support within both the enterprise and the small and medium-sized business workplace is greater than it has ever been. Mobile device proliferation has expanded into all corners of the business world, and likewise, the way that employees work has changed dramatically. Gone are the days when laptops represented the overwhelming method for completing work outside of the four walls. Smartphones and tablets are now a legitimate necessity for many workers, and this means that support for these devices is critical to ensure employees can remain productive at all times. Enterprises are typically more equipped to address these concerns than SMBs as a result of having greater resources and generally more robust IT teams.

Nonetheless, the SMB, SOHO, and consumer segments have an increased need for remote IT support. While these groups typically have very little or no IT resources, they may seek the assistance of independent support providers that can help their business get the support they need. At the end of the day, these segments are facing many of the same issues that larger companies are, but simply need a different method of tackling them.

For corporate IT, remote support is appealing because of the fact that many solutions on the market today allow engineers to multitask efficiently for quicker problem resolution. For example, if a technician is working on a specific server within a datacenter and is carrying a smartphone, he/she has the ability to log in to support sessions outside of the datacenter. Remote support solutions enable technicians to address employee or customer issues that may be occurring anywhere else in the world. Further, some solutions today include automated problem resolution for common support issues such as battery optimization, malware detection, and firmware support. This frees up time for IT to focus on more challenging support issues.

A challenge facing IT groups today with respect to remote support is how they plan to deal with the fragmented device landscape. The device policies an organization has in place make an enormous difference in the way the business handles remote support issues, since many solutions on the market today support only certain mobile operating systems. On top of this, the list of approved devices within the organization can have a direct impact on how much support a user will potentially require. For example, if the organization allows workers to use only Android devices, they are likely to deal with more malware-related problems than an organization that allows users to use only iPhones.

Significant Market Developments

This IDC study presents the top 6 market share leaders for 2014 in the worldwide clientless remote support software market. Over the past several years, the market for clientless remote support tools has grown considerably. Each of these providers is approaching the market in a slightly different manner and developing a niche for itself. Significant developments in this market include video capabilities and quick-fix types of features. These features will play an important role in supporting markets outside of the IT world, think industrials and medical devices.

Business Models

Today, clientless remote support software tools are offered in the business models discussed in the sections that follow.

Hosted Solutions

Most of the vendors in this market are providing the clientless remote support solution as a hosted application. In this business model, the customer or services provider pays a monthly or an annual fee to the vendor for the rights to use the software. This approach has advantages for services providers that intend to use these tools to provide support to their customers because it does not require them to make a significant up-front investment in software or hardware. This model is also easy to scale, as the customer can just add more seats with the hosted software provider.

Software Solutions

Some vendors are offering the clientless remote support solution under a traditional software licensing model. This model offers advantages for customers that are interested in using this type of solution to support internal employees. Because the software is installed on-premise, it is owned by the enterprise and thus can be deployed behind the corporate firewall, which helps minimize some of the security concerns of the enterprise.

Hardware Solutions

The final model being used is a hardware model. In this model, the vendor provides the solution as an appliance that can be installed in a company's datacenter. This model avoids the need to install the software on a server but maintains the advantages of being behind the firewall.

METHODOLOGY

To attain revenue numbers, IDC interviewed all participating vendors and researched all relevant data online to best ascertain industry size and those participating vendors' shares against that market.

Note: All numbers in this document may not be exact due to rounding.

MARKET DEFINITION

Clientless Remote Support Software Tools Market Definition

Clientless remote support software tools are applications that allow one device to stream the contents of its screen to another device via an Internet connection. These tools give IT support specialists the ability to remotely control devices from almost any system that can access the Web. Most of these solutions include the ability to support PC and Mac-based devices; however, remote support of mobile operating system (OS)-based devices is more limited today. Clientless remote support software tools differ from remote control software because they do not require client software to be pre-installed on the host machine to connect to the guest device. They differ from remote access services solutions in that they have a specific set of functionality that is geared toward an IT professional. Clientless remote support software tools are commonly sold in a subscription model, although licensed software and hardware appliances are also available.

RELATED RESEARCH

- LogMeIn Rescue Lens: Let the Camera Do the Talking (IDC #lcUS25528615, March 2015)

- *Proactive, Predictive, Prescriptive Deskside and Mobile Worker Support* (IDC #lcUS25494715 March 2015)

- *Worldwide Clientless Remote Support Software Forecast 2015-2019* (IDC #253609, January 2015)

- *Set It and Forget It: How Automated Remote Support Can Improve IT Operations* (IDC #253204, December 2014)

- *Bomgar 14.2: More Productive and Secure Access Features and Functionality* (IDC #lcUS24928214, June 2014)

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.

Global Headquarters

5 Speen Street
Framingham, MA 01701
USA
508.872.8200
Twitter: @IDC
idc-insights-community.com
www.idc.com