

# On the Radar: Nureva's audio products—the importance of performance and ease of deployment

## Summary

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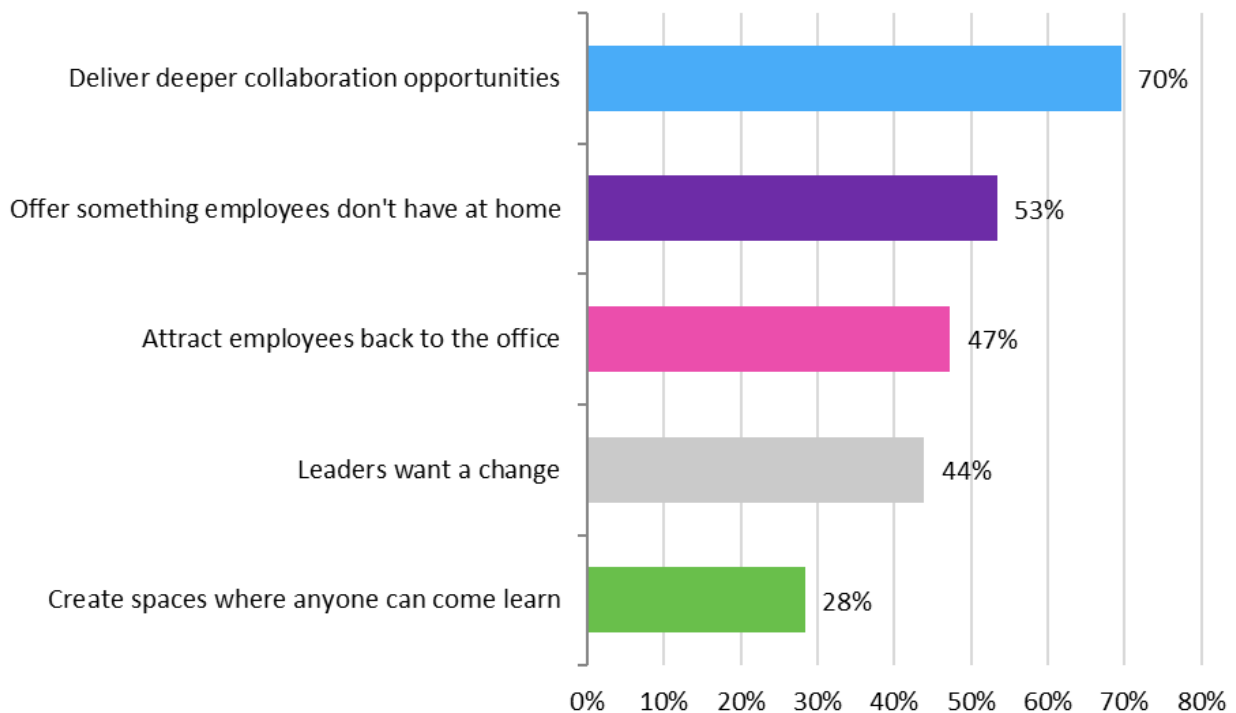
### Catalyst

Large spaces, including meeting rooms, training rooms, and lecture halls, are critical in businesses and education. A recent survey by Omdia reveals that enterprises are looking to incorporate advanced technology into these spaces to support various organizational functions, such as collaborative meetings, brainstorming, teaching, presenting, and executive discussions. This need has become more pressing as office sizes have decreased and there is a greater emphasis on strategically designing rooms for hybrid work models. Despite the technical challenges in ensuring high-quality audiovisual experiences, such as addressing echo, background noise, and spatial sound effects, carefully planned technology integration can significantly improve these environments. Omdia has reviewed the benefits of Nureva's line of audio-conferencing systems, powered by patented Microphone Mist™ technology, and evaluated the vendor's efforts to address the challenges of larger meeting spaces. With 10 years of experience, Nureva has introduced its new HDL pro series (Nureva HDL310 and HDL410 audio-conferencing systems) to the market at an opportune moment, meeting the demand of enterprises seeking compelling Pro AV solutions that are comparatively easy to install and use, with just one or two integrated microphone and speaker bars that hang on a wall, and provide full-room audio coverage in larger spaces. This report provides an unbiased view of the vendor and the HDL pro series line of products.

## Omdia view

The rationale for investing in large meeting spaces will remain compelling over the next five years, considering the increasing need to outfit these rooms with advanced technology to foster collaboration and enhance the employee experience. Omdia conducted regression analysis on its 2022 video-conferencing data (*Enterprise Video Conferencing Equipment and Service Survey*; see **Further reading**), which revealed that the funding for large meeting areas is not linked to the work model of an organization. Regardless of whether a company employs hybrid working standards or offers workplace flexibility, the financial commitment to large meeting spaces remains consistent. On the other hand, investments in smaller and huddle spaces were influenced by the company's hybrid work strategy. This indicates that large spaces remained a key investment focus for businesses before, during, and after the COVID-19 pandemic. Omdia's 2023 *Enterprise Video Conferencing Equipment and Service Survey* further shows that, in the next 18 months, enterprises plan to adopt conferencing and collaboration tools to help them deliver employee and customer experience, focusing on allowing executives better engagement and meeting effectiveness (see **Figure 1**).

**Figure 1: Top reasons for upgrading meeting room technology**



Note: n=148  
Source: Omdia

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## Why put Nureva on your radar?

Nureva is a key player in the audio industry with the capacity to capitalize on current opportunities. Omdia identifies four main reasons for considering Nureva's HDL pro series of products:

- Plug-and-play simplicity with one or two wall-mounted microphone and speaker bars
- Capture high-quality audio throughout the room, regardless of size, even in complex acoustic environments and very large spaces without requiring a complicated and expensive setup
- Innovative patented technology
- Ability to manage at scale

## Product/service overview

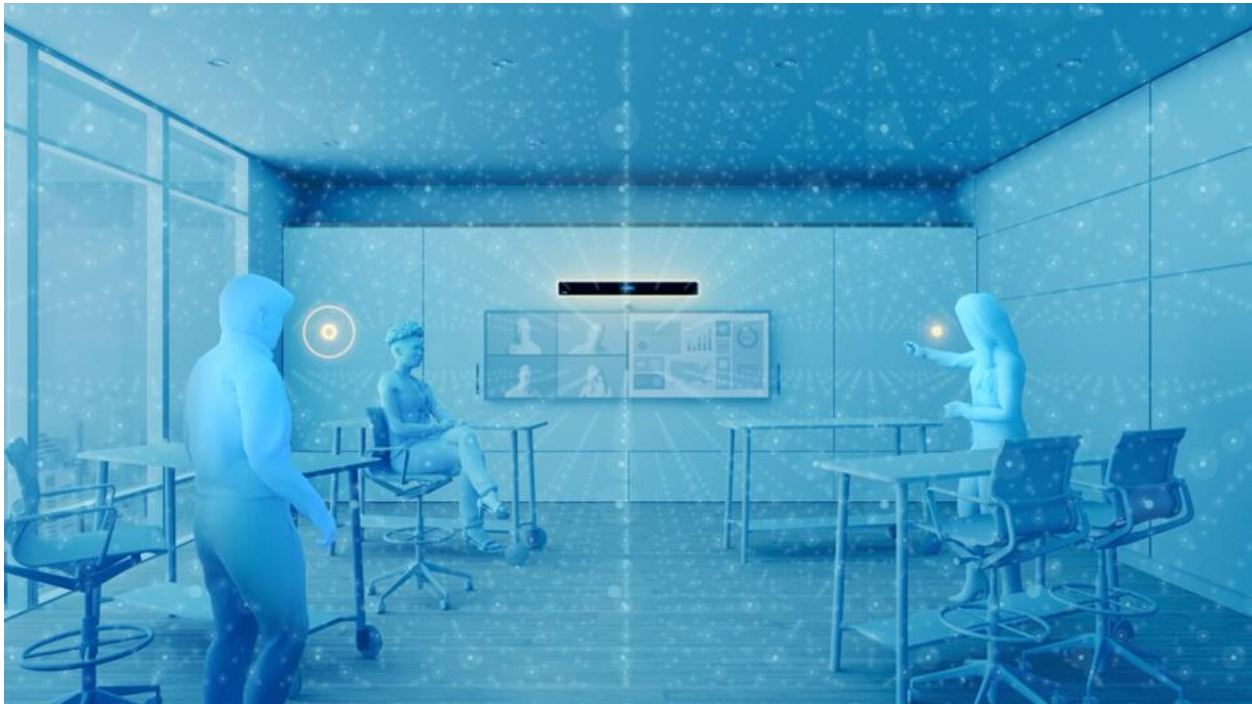
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### Nureva's Microphone Mist technology

Nureva's HDL pro series line of products is powered by its patented Microphone Mist technology, which differs from the beamforming technology currently available from other vendors in the market. It fills rooms with thousands of virtual microphones, so people's voices are picked up everywhere. Microphone Mist technology addresses acoustic issues in large and extra-large meeting areas, including echoes, background noise, inconsistent sound distribution, feedback, and mic and speaker interference. The other unique value proposition of the HDL pro series of systems is that Nureva has added more processing power and expanded the memory in the device, allowing for advanced audio capabilities within the technology.

At first glance, one might think it is just another audio-conferencing solution. However, it differs significantly from the standard ceiling and tabletop microphones with beamforming technology. Consider a large, intricately designed space with elements such as glass doors and unconventional furniture arrangements, where typical solutions such as ceiling microphones may not suffice. Here, beamforming technology can be applied as it uses multiple microphone elements to form fewer but more targeted audio pickup areas within the environment. It concentrates on picking up sounds from specific areas, such as around a conference table. However, beamforming sometimes necessitates broader beams, which may pick up extraneous noise. The effectiveness of beamforming also diminishes when individuals move out of these targeted zones. To address this, enterprises often end up deploying additional speakers and microphones, which unnecessarily increases the cost and complexity. Nureva solves this problem via its Microphone Mist technology for large and extra-large spaces (see **Figure 2**). Microphone Mist technology uses advanced algorithms to create and process thousands of virtual microphones, which are adaptive and responsive to the changing conditions in the room. The system can automatically adjust the sound pickup and output levels, reduce echo and background noise, and enable full-duplex communication. This results in clear and natural audio for remote participants, regardless of where people are in the room or how they move around.

**Figure 2: Nureva’s Microphone Mist technology**



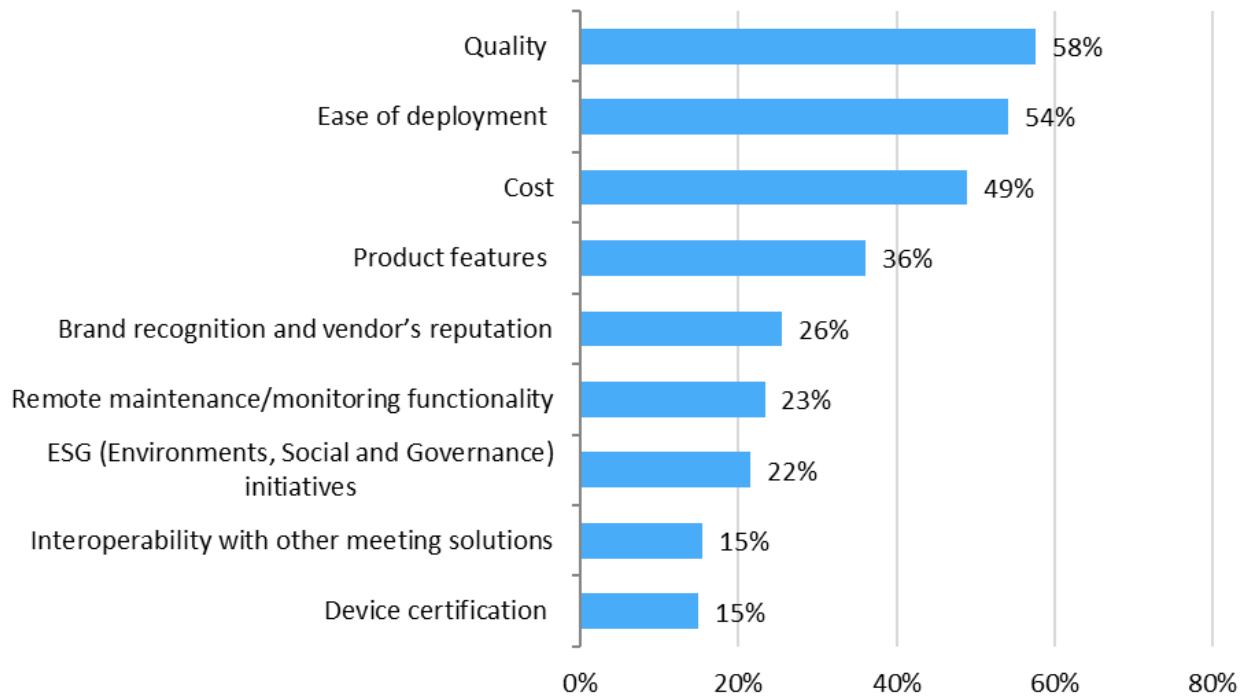
Source: Nureva

## Market context

### Unique value proposition of Nureva HDL pro series

To understand businesses’ primary concerns when outfitting their large room environments with collaborative technologies, Omdia queried participants in its 2023 *Enterprise Video Conferencing Equipment and Service Survey* regarding their main priorities while procuring this technology for their large meeting spaces. Most enterprises are keen on emphasizing high-quality and simple-to-set-up products. Specifically, 54% favor simple deployment solutions, emphasizing the importance of plug-and-play options (see **Figure 3**).

**Figure 3: Most important considerations when equipping meeting rooms**



Note: n=227

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Source: Omdia

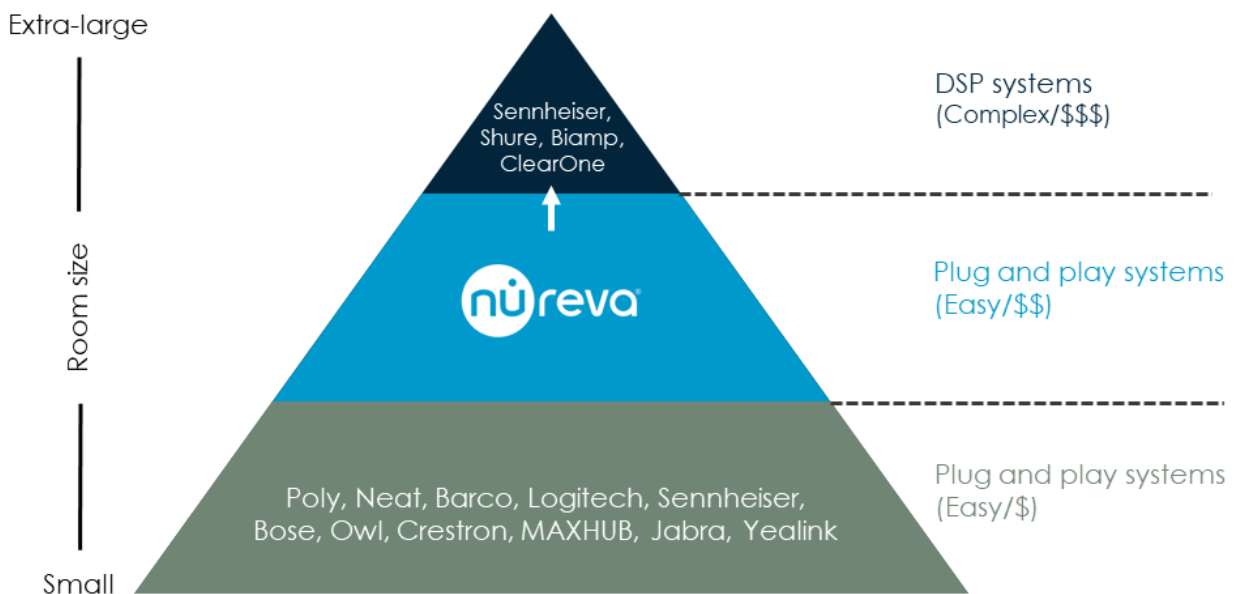
This is where Nureva's HDL pro series of systems stands out. Its distinctive value proposition addresses the top three considerations of Omdia's survey participants.

- The HDL pro series guarantees seamless and comprehensive coverage throughout the room. Unlike basic room coverage, it ensures that every corner of the space is covered without compromising layout or space utilization. Thus, it sets itself apart in quality and experience from its competitors.
- Integrating audio and video technologies is another challenge Nureva has solved using its HDL pro series systems without making it a cumbersome and time-consuming deployment for its customers. Nureva's unique sound location data from Microphone Mist technology makes automated camera steering and switching simple and more accurate for a variety of third-party cameras, including Sony, AVer, Lumens, and PTZOptics.
- The HDL pro series also eliminates the need for complex installation and calibration, as the system can be mounted easily on a wall and connected to a computer via USB. The HDL310 system can cover spaces up to 30×30 feet (9.1×9.1 meters) with a single integrated microphone and speaker bar. With two microphone and speaker bars, the HDL410 system covers even larger spaces up to 35×55 feet (10.7×6.8 meters). When taking other factors into consideration, the solution usually leads to lower costs.
- Its ability to offer one unit that can be installed, managed, and monitored easily at scale. The HDL pro series systems allow customers to cater to two distinct space types (large and extra-large rooms) using a single vendor, making it simple to source and deploy solutions and manage

vendor relationships. For customers needing full-room audio coverage in medium-sized rooms, Nureva's HDL200 system picks up every voice in spaces up to 18×18 feet (5.5×5.5 meters).

- Nureva also claims that it can maximize its customers' ROI by offering integrated solutions for audio and video for large spaces through its collaborations with leading camera vendors such as Sony, MAXHUB, and Logitech.
- The company has simplified the deployment of meeting room solutions in large, complex spaces. Previously, handling audio conferencing for big rooms involved multiple vendors and setups. Now, a plug-and-play solution from Nureva can deliver the same results. As with Logitech's all-in-one units for small spaces, Nureva integrates all audio components to address the challenges of larger spaces. **Figure 4** illustrates Nureva's market position relative to providers of video bars, such as Logitech's Rally Bar or Neat's Neat Bar Pro, and DSP system providers.

**Figure 4: Nureva's core competitive advantage**



Source: Nureva

## Company information

### Background

Nureva is a well-established audio-conferencing and collaboration vendor, founded in 2014. The company holds over 40 patents and has representatives in over 35 countries and six continents. To satisfy its customers' needs, Nureva competes with a set of established products and an evolving portfolio.

The vendor is known for its patented Microphone Mist technology, which creates thousands of virtual microphones to ensure that sound is captured clearly from any location within a room. This technology has proven advantageous in larger rooms such as boardrooms and educational settings, offering audio precision and reach. Distinguishing itself from competitors, Nureva's offerings are noted for their simple installation

and maintenance, earning them favor with IT departments looking to upgrade collaborative spaces with minimal need for technical assistance.

## Nureva’s current position and roadmap

Nureva is establishing its reputation as a pioneer in advanced audio-conferencing solutions, using its Microphone Mist technology, which provides it with unique market distinction and competitive edge. It is also expanding its market presence by integrating its audio systems with video technologies from other brands, such as AVer and Logitech, to enhance remote participants’ overall audio and video experience. This integration allows for precise camera tracking based on sound location, significantly improving the experience for remote meeting participants.

Nureva’s strategy centers on making collaboration easy and effective without the complexity and cost of traditional solutions. The company continues to innovate and develop its platform to meet the evolving needs of its customers. In addition to the hardware, Nureva offers several software solutions to enhance its audio-conferencing systems. One of them is Nureva Console, a cloud-based platform that allows users to manage and monitor their Nureva devices remotely. Another is Nureva Developer Toolkit, which includes APIs that enable integration of Nureva devices with cameras and other Pro AV systems.

Nureva’s latest offering includes the HDL410, designed for extra-large spaces. It is certified for Microsoft Teams and Zoom, among other cloud-based offerings. This is unique for Nureva because it is one of the few integrated mic and speaker bars for larger spaces that is certified by Microsoft Teams and Zoom, unlike DSP-based systems. As a standard USB device, it works with almost everything else in a meeting space. The company plans to enhance its offering going forward by focusing on large and extra-large meeting and learning spaces and addressing a broader range of audio use cases.

## Key facts

**Table 1: Nureva datasheet**

<b>Product/service name</b>	Nureva	<b>Relevant customer segment</b>	Enterprises of all sizes looking to equip large spaces can benefit from this offering.
<b>Hardware product details</b>	HDL410, HDL310, HDL300, HDL200	<b>Software offerings</b>	Nureva Console, Nureva App, and Nureva Developer Toolkit
<b>Industries covered</b>	Corporates, finance, healthcare, education	<b>Geographies covered</b>	Global
<b>URL</b>	www.nureva.com	<b>Certification</b>	Microsoft Teams, Zoom, and other services
<b>Company headquarters</b>	Calgary, Alberta, Canada	<b>Routes to market</b>	Channel and ecosystem collaborations

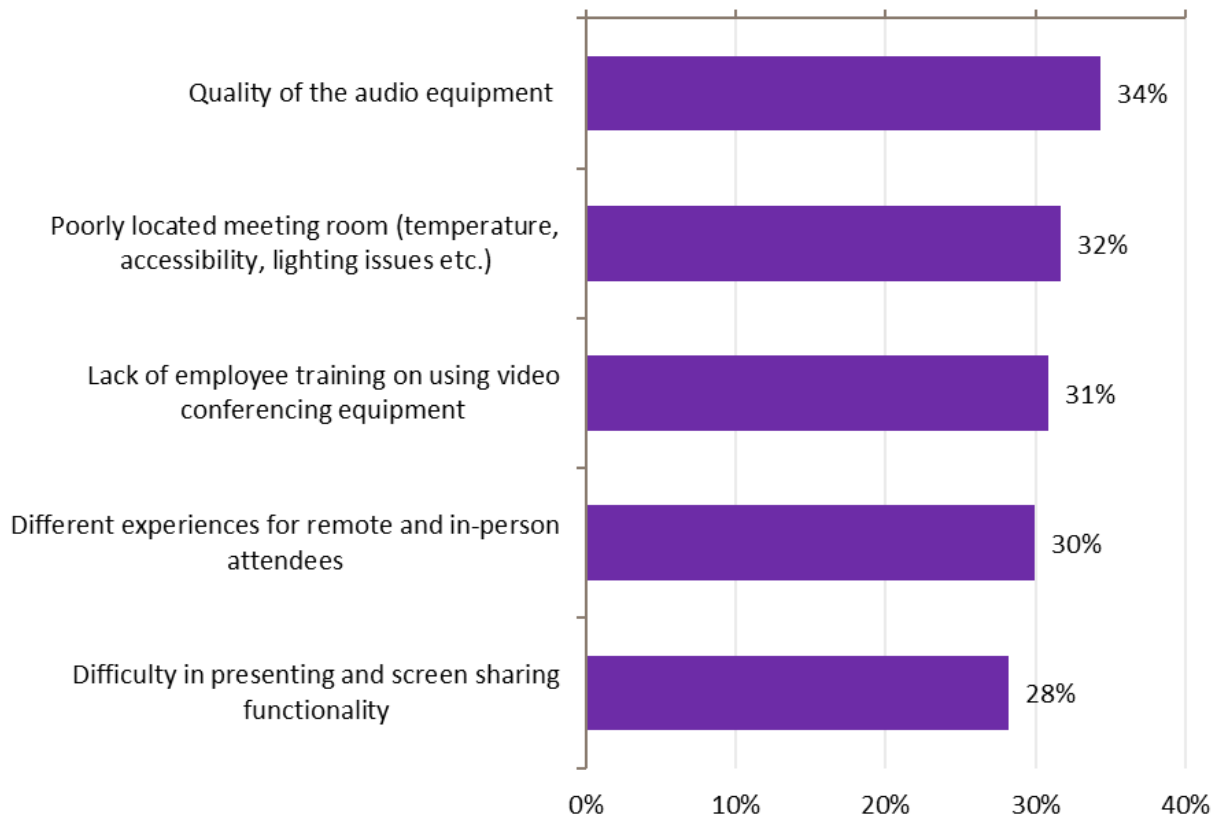
Source: Omdia



## The evolving market landscape

The COVID-19 pandemic spurred significant demand for collaborative meeting services, with revenue rising from \$3.4bn in 2019 to \$15bn in 2023, according to Omdia's *Collaborative Meeting Services Forecast* report. The COVID-19 pandemic has accelerated the shift away from conventional conference room technology, favoring simple plug-and-play options that can be deployed swiftly, enabling clients to update their spaces efficiently with user-friendly technology that accommodates the hybrid working styles of their workforce. The shift to virtual and hybrid working habits also led to a demand for affordable solutions to address audio and video challenges. Our survey results in **Figure 5** list the top reasons for employees to upgrade, particularly in large meeting areas.

**Figure 5: Top reasons for upgrading large meeting room technology**



Notes: n=227

Source: Omdia

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To deliver superior employee experience in shared spaces, enterprises want a robust solution that offers rich features and scores high on scalability, third-party integrations, ease of use, and deployment, promoting work and collaboration. However, they need answers to specific questions before committing to a vendor or a product:

- What is the vendor's and products' unique value proposition?
- Is the vendor's solution certified to work with their preferred collaborative meeting service?
- How easy is monitoring and managing the room and the solution deployed?



- Does the vendor offer easy upgrades over the air, and is the solution easy to scale?
- Do businesses need to work with multiple vendors and systems integrators to equip their rooms, or can their internal IT department handle the rollout, deployment, and maintenance?
- What ROI can be achieved using a particular meeting room solution?

These critical questions can help an organization prepare its investments wisely. The video-conferencing hardware device market is complex and diverse, with many regional and global players complicating vendor selection. There are three broad types of vendors in this space:

- **Innovative technology providers:** This category focuses on vendors that bring new and innovative products to the market, which address complex spaces through cost-effective and easy-to-deploy solutions. Vendors like Nureva offer unique solutions such as Microphone Mist technology, which fills spaces with virtual microphones for full-room coverage without requiring extensive integrations.
- **Scalable solution providers:** Companies that offer solutions that can easily scale to accommodate different room sizes and complexities, ensuring that as the space's needs grow, the technology can grow with it. Companies such as Logitech, Barco, Poly, Nureva, and Neat fit in this space.
- **Comprehensive service providers:** Vendors that provide a full suite of Pro AV products and services, including mixers, DSPs, amplifiers, and switches, for complex spaces that require customized offerings. This category involves several vendors collaborating with partners to offer integration and working with systems integrators that are well-versed in delivering a tailored solution depending on the space, use case, and customer requirement. Vendors in this category feature QSC, Crestron, and Biamp.

Nureva falls into the top two vendor categories and is uniquely positioned to address its customers' pain points.

The evolution in the video conferencing device market is driving vendors to meet the diverse needs of their customers for all types of rooms and spaces, either through direct development or partnerships. Yet, the complexity of video conferencing equipment and the shared features among products require careful analysis to make informed choices. Despite high audiovisual budgets, businesses still encounter audio issues, as identified by Omdia's *Enterprise Video Conferencing Equipment and Service Survey*, proving that cost does not equate to quality. Enterprises now focus more on detailed site and room evaluations than just adopting additional audio solutions to cover a room or go for expensive audio solutions. Thorough preselection assessments have become vital.

## Analyst comment

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Omdia recently received a demo from Nureva of their breakthrough Microphone Mist technology, which powers their full line of audio-conferencing systems. The next generation of Microphone Mist technology powers Nureva's HDL pro series of systems, which includes the HDL310 system for large spaces and the HDL410 system for extra-large spaces. They come with a supporting connect module to build a fully integrated video-conferencing solution for larger spaces. Nureva showcased the HDL310 audio-conferencing system for spaces up to 30×30 feet (9.1×9.1 meters) from their offices in Calgary, Alberta, Canada. They also showcased their HDL410 system, designed for extra-large spaces up to 35×55 feet

(10.7×16.8 meters), using camera tracking and switching from their office in Ottawa, Ontario, Canada. Omdia recognizes the HDL410 audio-conferencing system as an inventive product that meets the widespread demand for high-quality sound, straightforward setup and configuration, and superior user experience in extra-large spaces. Nureva's Microphone Mist technology provides a unique advantage over traditional microphone arrays or beamforming solutions, as it creates a virtual microphone grid that covers the entire room and captures every voice regardless of where a person is or how they move; this ensures that the coverage is automatically, and continuously, maintained everywhere. The system also delivers clear and natural sound through its full-duplex speakers and reduces unwanted noise through its Intelligent Sound Targeting feature. Omdia believes that Nureva's HDL410 audio-conferencing system is a compelling option for extra-large meeting rooms that require high-quality audio and video and that the system can provide a competitive edge for Nureva in the competitive and evolving market of meeting room solutions.

## Appendix

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### Definitions

- **Collaborative meeting services:** Collaborative meeting services are defined as real-time, cloud-based video-conferencing and collaboration technology that allows users from different locations and devices to hold scheduled or ad hoc meetings, interact, and exchange information. These services typically include video and audio conferencing (including PSTN access), screen sharing, recording, and messaging. Some services may also support bridging for third-party H.323 endpoints, training, webinars, and events.
- **Large meeting rooms:** Omdia defines a large meeting room as accommodating more than 15 people.
- **Video bar:** An all-in-one audio/video solution in the form of a bar that can be deployed in the front of the room. It could also be an Android/Windows-based unit.

### On the Radar

On the Radar is a series of research notes about vendors bringing innovative ideas, products, or business models to their markets. On the Radar vendors bear watching for their potential impact on markets as their approach, recent developments, or strategy could prove disruptive and of interest to tech buyers and users.

### Further reading

[\*Video Conferencing Equipment, Peripherals, and Services Market Landscape CY23, Forecast 2024–28\*](#) (June 2024)

[\*“Enterprise Connect 2024: The office needs a hardware edge to attract employees”\*](#) (April 2024)

[\*Enterprise Videoconferencing Equipment and Peripherals Market Tracker – 4Q23 and Full-Year 2023 Analysis\*](#) (March 2024)

[\*Video Conferencing Equipment and Peripherals Market Dashboard\*](#) (April 2024)

[\*“ISE 2024: Tech fusion unleashed – AI, IT, Pro AV, and collaborative communications”\*](#) (February 2024)

[\*2024 Trends to Watch: The Collaborative and AI-augmented Future of Work\*](#) (December 2023)

[Enterprise Video Conferencing Equipment and Service Survey](#) (November 2023)

[Market Landscape: Collaboration Boards](#) (August 2023)

[Collaborative Meeting Services Forecast – 2023–27 Analysis](#) (April 2023)

[Collaborative Meeting Services Forecast – 2023–27 Data](#) (April 2023)

[Interoperability with Microsoft Teams becomes key to Cisco's strategy](#) (November 2022)

[Omdia Universe: Collaborative Meeting Services, 2022–23](#) (June 2022)

[Omdia Universe: Collaborative Meeting Services, 2022–23](#) (June 2022)

[Enterprise Video Conferencing: Survey Insights – 2022](#) (December 2022)

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