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Finding a new balance

how better **hybrid** meetings will improve collaboration & engagement in the workplace



About the study

Now, in this new global study by Barco, we reveal that employees worldwide are desperate to get back to the office and are looking to their employers to establish a technology-driven hybrid working environment that enables them to do so quickly, safely and flexibly.

As one of the leading collaboration technology providers, Barco likes to keep its finger on the pulse of what's driving the big trends in collaboration, communication and employee engagement in the office environment.

The insights in this report are based on the findings of an international study of 1,750 white collar workers who do an 'office' job (even if they currently work from home).

Individual entrepreneurs were excluded from this sample, on the basis of not having colleagues with whom they need to interact. The sample consists of 250 employees from seven countries: the UK, US, Australia, India, France, Germany and the United Arab Emirates. Unless otherwise stated, the total figures provided in this report are the average figures across all countries, treating each country equally.

The survey was conducted online via Dynata, a global research panel provider. Surveying was carried out between the 7th and 18th of September 2020.



Foreword

We find ourselves in the midst of a workplace flashpoint, ignited by the spark of the COVID-19 pandemic and there is no part of society or the economy that hasn't been touched by this unprecedented global event. For companies with a mainly office-based workforce, it has meant the greatest and fastest shift in ways of working ever seen before in the corporate world.

But while the world of work will never be the same again, the immediate reaction to the pandemic – that office life as we know it would end and people would move to universal remote working for the foreseeable future – already looks to be an overreaction. The welfare of staff of course remains of paramount importance and as a new wave might bring further lockdowns there remains a high proportion of employees working remotely. However, there is also a burning desire to get back to normal or should we say new normal.

Our survey shows that the number of employees who want to work from home permanently is remarkably small. 85% of the workforce wants to return to the office and resume the social aspect of working life that they have missed so much, albeit with the freedom, flexibility and facilities to adopt a better blend of home and office working.

This shift to hybrid working is a trend that's been building for many years. COVID-19 has simply accelerated this trend and brought it more acutely into focus. Corporates now need to ask: what do we want our hybrid working model to look like?

Technology will be fundamental to this journey. As many people have discovered this year, hybrid working is only viable, productive and enjoyable when you have the right tools at your disposal, whether you are in the office or working remotely. User experience is paramount. If collaboration and communication between physical and virtual attendees is hindered by inadequate conferencing facilities or poor usability, the benefits of the hybrid model fall apart.

As 56% of employees prefer to host video calls from their own laptop, over any other device or in-room technology, companies will also need to rely on technology that supports this laptop-first trend to facilitate engaging and flexible hybrid meetings. Companies and public sector have now realized that they need to invest in hybrid meeting technologies to enable better engagement, productivity and collaboration for a workforce split between the office and remote locations. Most importantly, as our study shows, the employees themselves are clamoring for this investment.

To better understand some of these meta-trends in the workplace, we have carried out an extensive study of employees in companies across a range of sectors, asking them for their views on what the 'future of the workplace' should look like. It brings to life the challenges and opportunities organizations and their employees face as we navigate a fast-changing landscape in the COVID era and gives some insights into how employees around the world are feeling about meetings and hybrid working. There is a lot of good news in there, but there are lessons to be learned too. We hope you enjoy reading the report and welcome further discussion on this important topic. In this report we also introduce our Meeting Quality Index with which we want to measure if the quality of today's meetings is improving (or deteriorating) compared to the previous quarter. You can expect a regular update of our Barometer in future.

Lieven Bertier, Segment Marketing
Director Workplace, Barco

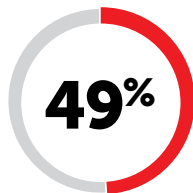
Hybrid Working

Employees worldwide want to return to the office now

People want to spend most of their time in the office: on average employees only want to spend a maximum of 2 days a week at home

49% enjoy working from home less than they did at the start of the pandemic and 42% say working from home stifles their creativity

Lack of face-to-face interaction with colleagues is the main cause of poor collaboration and connectivity at work for nearly 60% of office workers



49% enjoy working from home less than they did at the start of the pandemic



60% agrees that lack of face-to-face interaction causes poor collaboration

Remote working has been a well-established trend for some time. Many businesses, particularly larger global organizations, have recognized the need to empower their employees to be able to operate effectively from multiple locations and have invested heavily in technologies to facilitate truly flexible working.

When the COVID-19 pandemic forced almost every office-based business around the world to shift entire workforces to remote working, some thought this would be the death of the office. The reality has been very different. Many have suffered from detachment from their colleagues, both emotionally and in terms of their work, and found real frustrations with long-term remote working (Chart 1). 49% globally said they have found working from home less fun as time has gone on, while 42% said that remote working does not stimulate their creativity.

Only 15% of respondents to our survey said they would like to continue to work from home full-time once the COVID-19 pandemic is over, while 26% said they wanted to return to the

office 5 days a week, citing benefits of finding it easier to work and socialize with colleagues. But the norm will most likely be a more flexible balance. On average, employees say that in the future they would like to work from home two days a week but would still prefer to spend most of their work week in the office (Chart 2).

Claims that the pandemic will also spell the end of the large corporate headquarters now seem overestimated. The employees we surveyed around the world largely rejected the idea of spending more time in smaller satellite offices or shared working spaces – a trend that was predicted to skyrocket after COVID-19. Instead people still prefer to work from their corporation headquarters (Chart 3). What is clear is that employers now need to build their workplace strategy around this desire for a more balanced, hybrid way of working. This does not mean a wholesale shift to remote working, far from it: it means creating a workplace culture that empowers employees to work flexibly to achieve the benefits of working from home and working in the office, depending on the type of work they need to do and their individual circumstances.

Chart 1: Biggest downsides of working from home

% selecting each downside, total

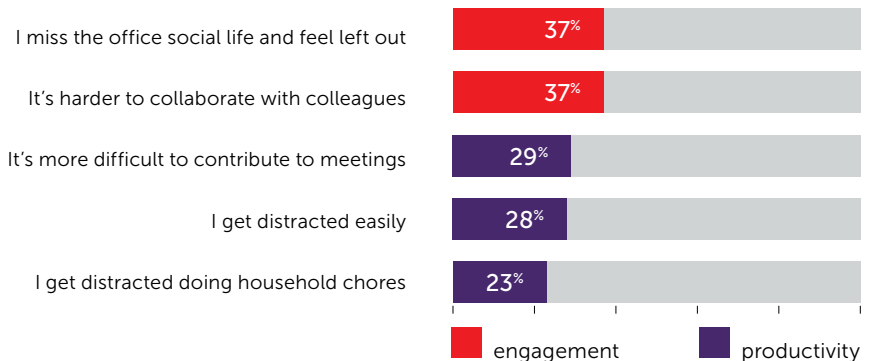


Chart 2: Working from home by country: Pre-covid, current and desired

Average days worked from home by country

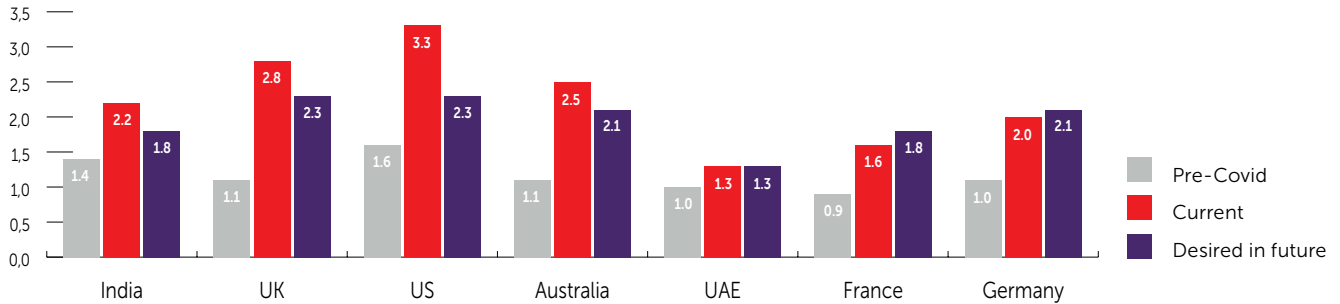
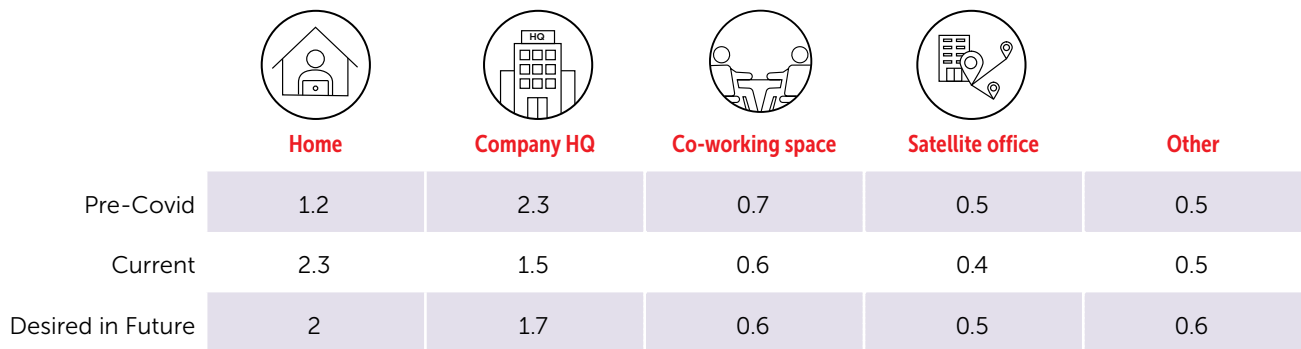


Chart 3: Split of work by location: Pre-Covid, current and desired

Average days worked per location



Sidebar on Regional findings:

There were interesting differences between perceptions of employees in different regions. India values family time more than any other country, with 65% of respondents naming this as a benefit of working from home. Yet India was one of the countries with the lowest desire to work more from home in future, wanting on average only 1.8 days at home per week in future. The UAE wanted even fewer, with only 1.3 days working from home desired on average. At the other end of the scale, the UK and US wanted the biggest shift to home working, desiring 2.3 days a week on average each – closely followed by Germany and Australia with 2.1 days.

Looking at the downsides of remote working, the UK and India again stood out as the most sociable of the countries surveyed. 49% of Indian respondents and 42% of UK employees said they miss the office social life and feel left out when working from home, compared to 37% in Germany and Australia, 33% in UAE and 31% in France and USA.

In India, UAE and Australia, the majority of respondents had found working from home became less enjoyable as time went on in lockdown: 51% in Australia, 60% in UAE and a huge 77% in India agreed, compared to 40% in UK, 39% in the USA, 38% in France and 37% in Germany.

Hybrid Meetings

Redesign the office

23% of meetings are already a mixture of in-person and remote attendees; employees predict that proportion will jump to 29% in a year

The huddle space might be on the way out: 50% prefer formal meeting rooms over huddle spaces, and 75% prefer scheduled meetings over impromptu ones

1 in 3 employees use a standard meeting room or boardroom daily

Currently more than half (52%) of all meetings taking place are with remote attendees only – twice as many as in 2019. But this is not permanent: employees expected this number to drop significantly once the COVID-19 pandemic has been brought under control, instead shifting to a better balance of remote, face-to-face and hybrid meetings (Chart 1).

One in four meetings taking place already feature both in-person and remote attendees, and employees expect this proportion to rise over the next 12 months. This means offices will need to be equipped for hybrid meetings. Indeed, the employees we surveyed said that providing video conferencing rooms and investing in better video conferencing equipment should be the number 1 investment priority for their organizations.

Desire for personal relationships and face-to-face interaction are the clear drivers to shift from all-remote to hybrid and face-to-face meetings. Being able to work directly alongside and socialize with colleagues were

named by nearly half of all employees as the greatest benefits of office working. There was the importance of those ‘water cooler moments’ – the informal interactions where colleagues spontaneously share information – in not just improving productivity and collaboration, but also in adding to the social side of working life (Chart 2).

Employees have made it clear that certain types of meeting require being physically present in the room. They felt that all-remote meetings required a pre-existing level of trust. More informal meetings like quick info-sharing sessions or team catch-ups can and should be fully remote. But when you are introducing yourself to a new contact, making serious business decisions or handling conflicts, many employees felt these meetings should take place face-to-face (Chart 3). Hence the preference for more traditional meeting rooms (Chart 4).

Counter to the trend pre-COVID, we are now seeing a shift towards scheduled meetings in formal meeting spaces, rather than impromptu catchups in huddle spaces (Chart 5).

Chart 1: Biggest benefits of working in the office

% selecting each benefit, total

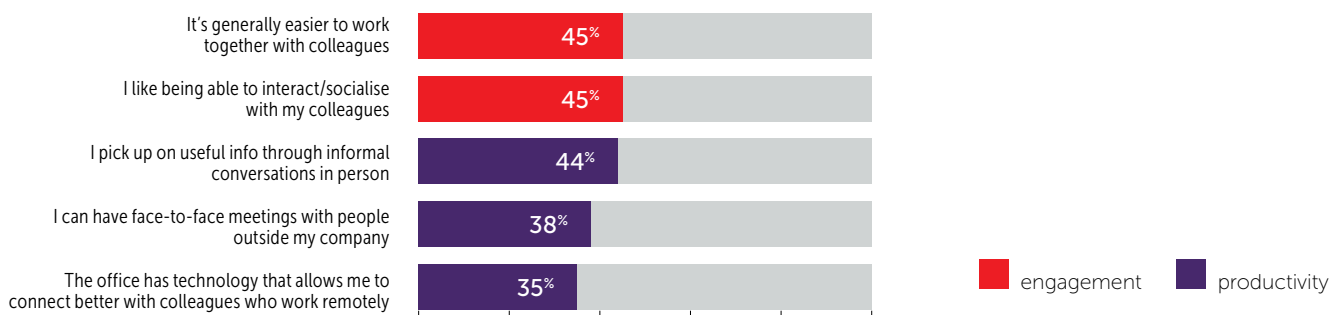


Chart 2: Current meetings format and future prediction

Balance selecting each option

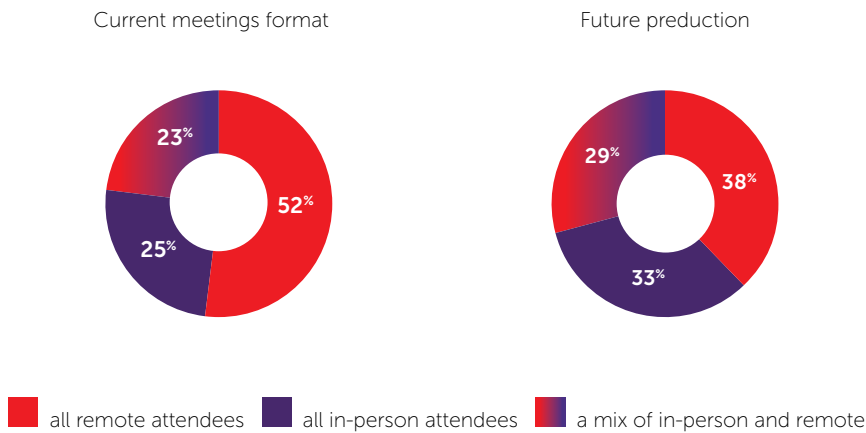


Chart 3: Types of meeting and preference for remote location

% selecting scenario, total sample

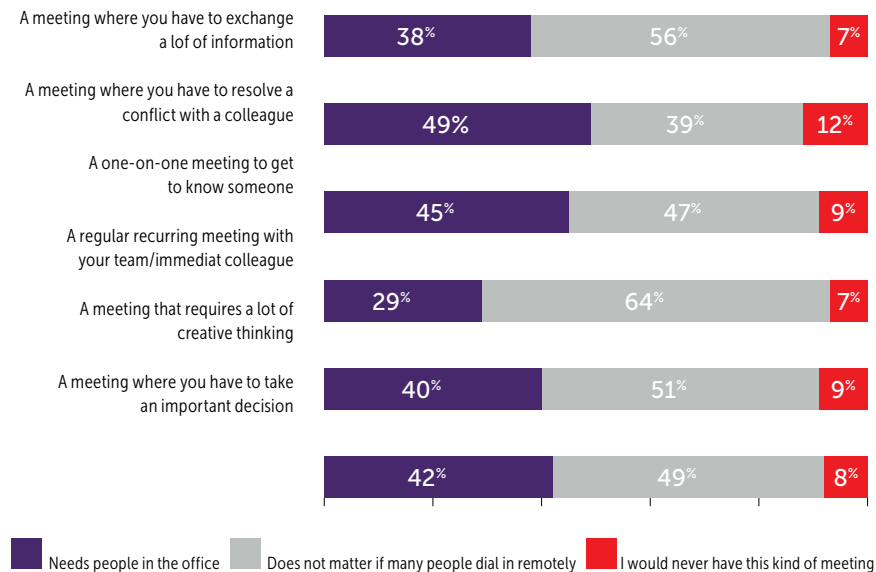
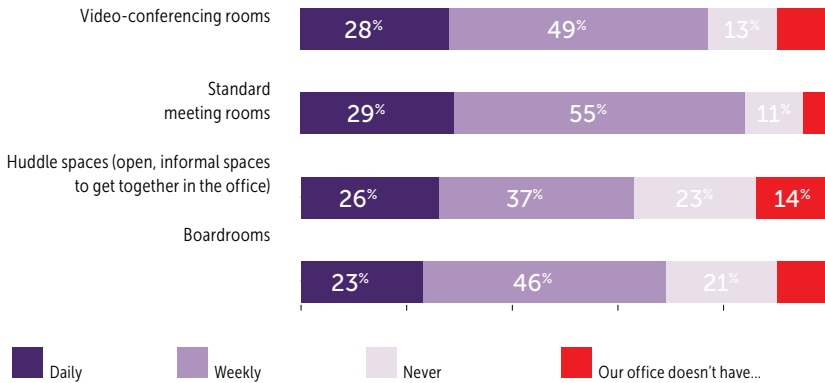


Chart 4: Meeting locations by level of use

% selecting meeting location, total sample

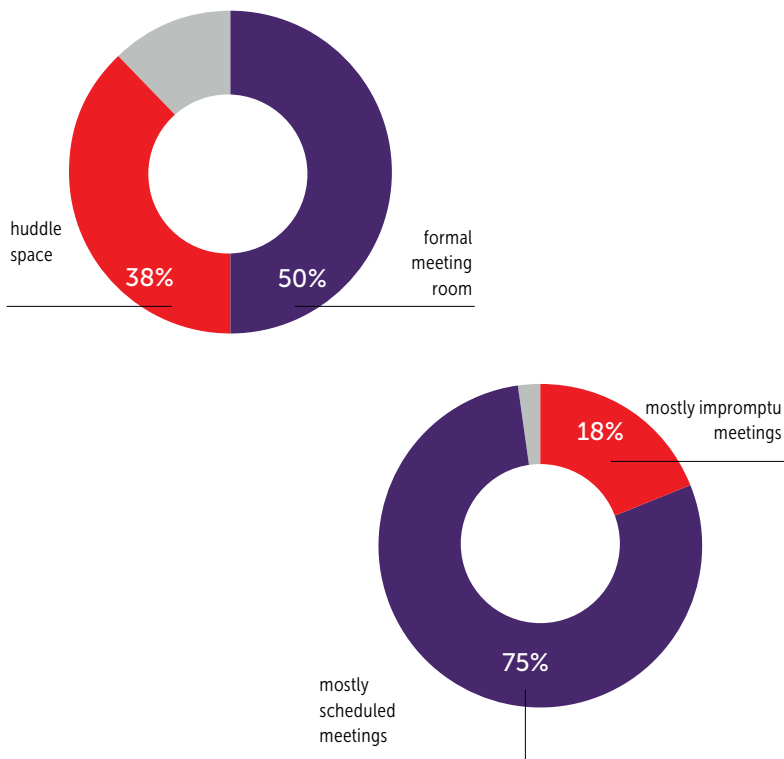


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Chart 5: Preferences for the post-COVID office

% selecting scenario, total sample



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Video Conferencing

Video drives collaboration and engagement

Video conferencing is the number 1 investment priority for employees worldwide; 1 in 3 respondents want their company to invest in video conferencing technology (Chart 1)

Nearly 8 in 10 employees use video conferencing rooms in their office more than once a week; 1 in 3 use them more than once a day

14 different video conferencing tools are being used regularly by employees, but three big players dominate: Zoom, Microsoft Teams and Skype

Asked where they would most like to see their employers invest, our respondents chose video conferencing equipment for use in meeting rooms as their preferred destination for new investment in future. The findings may seem surprising at first glance, until you look at how prevalent the use of video conferencing technology has become and the fundamental role it now plays in collaboration, communication and productivity for a digitally driven workforce.

After standard meeting rooms, video conferencing rooms are the most commonly used spaces in the office. 77% of respondents said they use video conferencing rooms at least once a week, with 28% using them every day on average (Chart 2).

The proliferation of conferencing solutions being used also shows the prevalence of video-based meetings now. 14 different conference systems have been used over the past six months. While this shows the diversity of options available, we are also seeing three key providers pulling away

in the race to dominate the video conferencing space: Zoom leads with 51% saying they have used it in the past six months, compared to 38% each for Microsoft Teams and Skype. They lead the fourth-placed provider, Google Meet, by a significant margin – only 20% say they have used Google’s solution in the past half-year.

Despite this, views of video conference are still very mixed among employees around the world. There are clear frustrations: the system not allowing external guests to participate was the most commonly cited frustration, followed by inability to share content, incompatibility of preferred conferencing platforms and being unable to connect to meeting rooms (Chart 4). But our respondents also felt that video conferencing brings improvements to meetings. 52% believe people come more prepared to meetings now, 47% think there is less time wasting at the start of a meeting, and 39% value the fact that there is less small talk when using video conferencing.

Chart 1: Investment areas in the office
% selecting investment areas



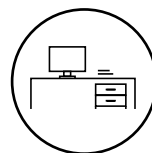
33%

Video-conferencing equipment for use in meeting rooms



32%

More private offices



30%

More desk space



26%

The ability to control meeting room technology from a laptop

Chart 2: Usage of video conferencing room

% using meeting room

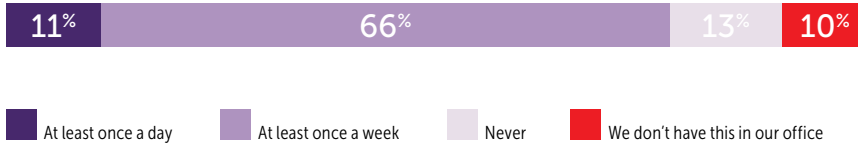


Chart 3: Trending conferencing solutions

% selecting conferencing solution, total sample

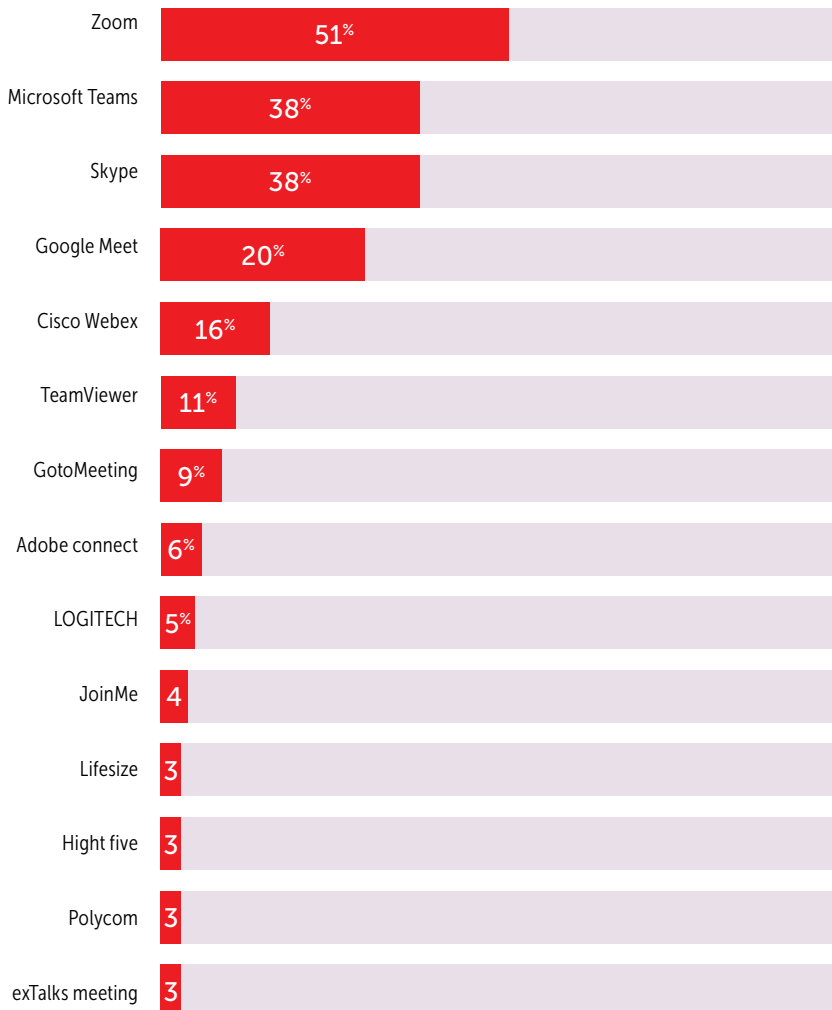
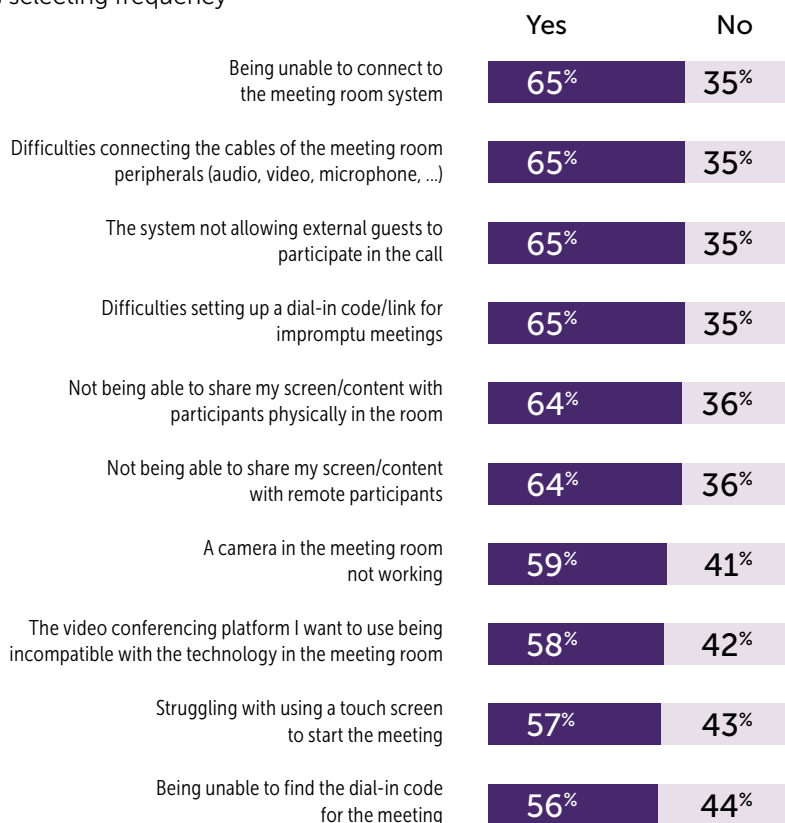


Chart 4:
Frequency of problems during office video conferences
 % selecting frequency



Sidebar on Regional findings:

As nations around the world become increasingly reliant on digital technology to connect with colleagues, there are still those who remain cynical over its ability to replace more traditional face-to-face exchanges.

While there is an overall preference for virtual meetings globally, most German colleagues (57%) continue to favor meeting co-workers in person, with significant numbers in Australia (49%) and the UAE (45%) sharing a similar view.

This is due at least in part to occasional failures in technology, resulting in connection interruptions during virtual sessions and being unable to successfully integrate preferred video conferencing tools and solutions.

Almost three in 10 Indian (28%) and one in five Australian (21%) and UAE (19%) respondents admit that their preferred video conferencing platform is often incompatible with the available in-office meeting room technology. Meanwhile, a quarter of Indian (24%) and Australian office workers (23%) often struggle to connect to a conferencing meeting room system, causing unwanted delays and frustrations.

Sector breakdown

Market share

Sector	Market Share
Automotive	43%
Technology	25%
Finance services	32%

Summary

Automotive stays as having the highest market share across all sectors. We have seen an increase in... whereas techn...



Bring Your Own Meeting

The laptop is the new window to the world

4 in 10 employees are using their laptops to host video calls once a day; 8 in 10 are using them at least once a week

56% of employees prefer to host video calls from their laptop, compared to an in-room system (19%) or their smartphone (18%)

54% using camera from laptop when they are in meeting room, yet 60% complains of camera malfunctions.

Even before the pandemic, employees were selecting their own preferred video conferencing and virtual meeting solutions rather than using the 'official' company solution. This 'Bring Your Own Meeting', or BYOM, trend has exploded in lockdown, as people found themselves working from home and naturally gravitating towards software tools that they are familiar with and trust – especially important when there was so much disruption elsewhere in working life.

Workplace collaboration and communication now revolves around the laptop. Respondents said they prefer to host a video call from their laptop over any other method: nearly three times more than the next-best option, an in-room video conferencing system (Chart 1).

Laptops are being used to host video calls at least once a day by 40% of employees, with nearly 8 in 10 (77%) saying they are using them more than once a week (Chart 2). 77% even said they couldn't bear to be parted from their laptop while at work.

Despite the growth of in-room cameras (traditional in-room conferencing systems and USB-based SWAPs) from 30% now to 40% in one year's time, laptop cameras are also still the most regularly used for virtual meetings. 54% use the camera on their laptop, compared to 40% who use in-room cameras and 24% who use the camera on their smartphones (Chart 3).

Clearly, however, this is a sub-par experience because more than 60% of respondents complained of camera malfunctions during meetings. It is no wonder therefore that 49% of employees admitted that virtual meetings don't come naturally to them.

Chart 1: Technology preferred to host a video call

% selecting video call hosting method

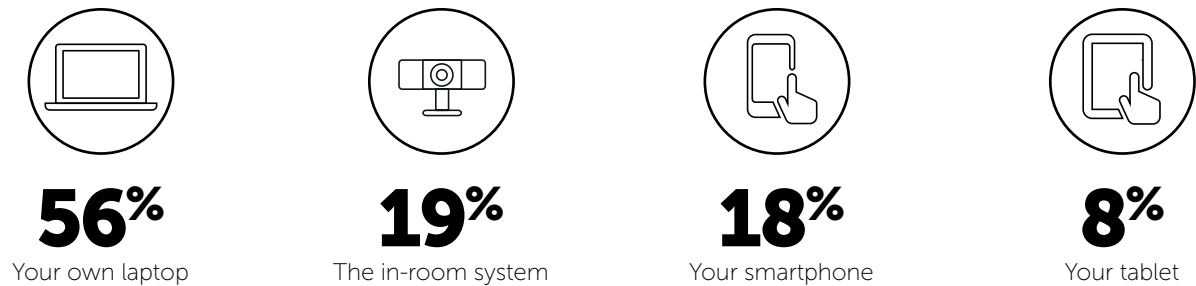
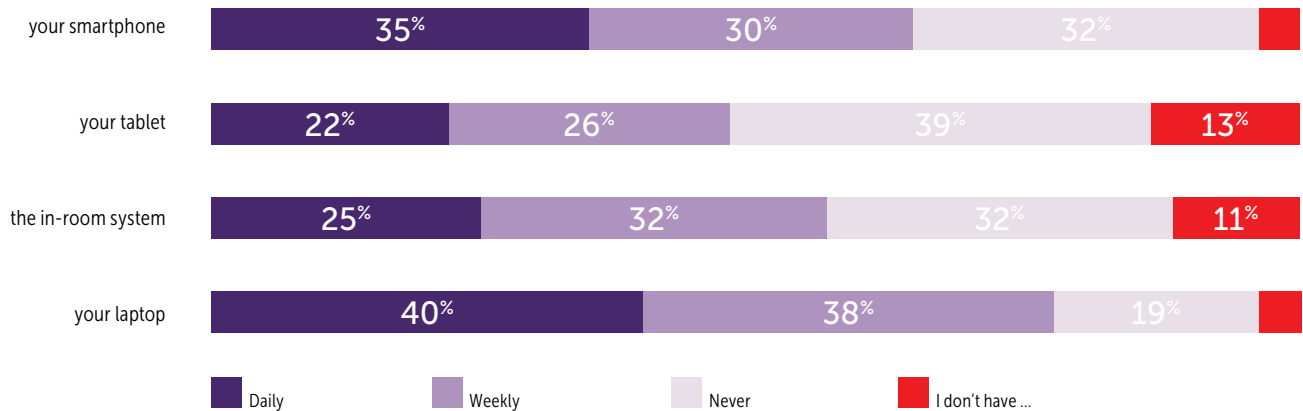


Chart 2: Technology used to host over the latest quarter

% selecting video hosting method



Sidebar on Regional findings:

There was a significant preference for hosting video calls from employees' laptops in all countries, but the strongest preference came from France where 64% choose the laptop to host video calls over all other devices.

In India, the camera used for video conferences in meeting rooms is mostly on their laptop for three out of four employees, whilst in the UK a larger number of employees use the camera provided in the room (43%) – the largest of any country survey. This perhaps suggests the UK has more

advanced in-room technology than other markets, or at least its employees have embraced their use more readily than others.

Over the last quarter, employees in India and the UAE are the ones that use their laptop to host video calls the most frequently, with 67% and 56% respectively indicating they use this method more than once a day.

Meeting Barometer

Employees expect a better class of meeting and technology

48% of employees say the number of meetings they have had gone up since last year

Our Meeting Quality Index suggests a cautious positivity about the quality of meetings compared to last year; 35% believe meetings have improved since last year, compared to 18% who believe they've got worse

More than half of the workforce wants to see meeting room technology designed for more usability in the next year

It comes as little surprise to see that employees feel there are more meetings now than there were last year, with 48% saying meeting frequency has increased (Chart 1). What is more surprising is that respondents overall still feel cautiously optimistic about meetings in general.

When Barco conducted its Future of Meetings research in 2019, 75% of respondents agreed that meetings had improved. This number has dropped to 35% in 2020, but the number of people who believe meetings have improved still outstrips those who believe they have got worse by a factor of nearly two to one (Chart 2).

When you look at what employees want to see from future meetings, it's clear that there are high expectations for technology-driven improvements. The biggest priorities are technologies that improve efficiency and usability, and which streamline workflows. 56% said apps for joining a video conference in one click should be available within the next year, if they weren't already. Meanwhile, voice recognition technology, software for remote co-creation and Instagram-style filters

for video conferencing are all expected by most people within just two years (Chart 3).

There is also a clear focus from employees on engagement and enabling better collaboration with colleagues. 61% of respondents expect to see virtual reality tools to enable remote participants to appear 'in person' in a room within three years or less, while 67% think AI that provides feedback on participants and their engagement in meetings should be in place within the same period.

This underlines the need for meeting technologies to facilitate more connectivity between physical and virtual participants in future. Indeed, six in ten people believed that a lack of in-person interaction with colleagues was one of the key reasons for feeling less connected to their colleagues, and 49% said that collaborating remotely with colleagues, clients and others does not come naturally. If technology can help to tackle this and enable hybrid and virtual meetings that foster better connections between participants, we will see meeting quality and employee engagement continue to rise.

Chart 1: Meeting frequency compared to last year increased

Meeting comparison with last year, on average and by country

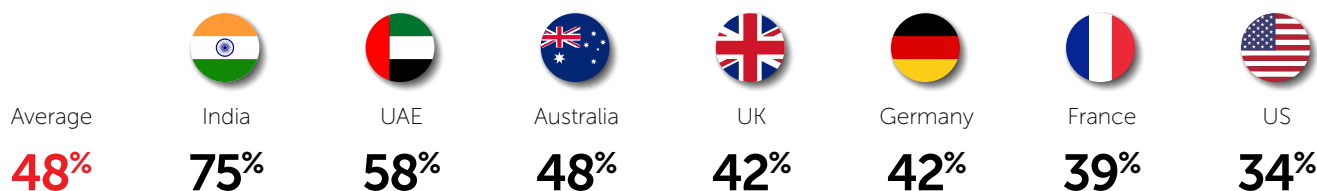


Chart 2: Meeting Quality Index

Meeting comparison with last year.

People believe meetings have improved by %

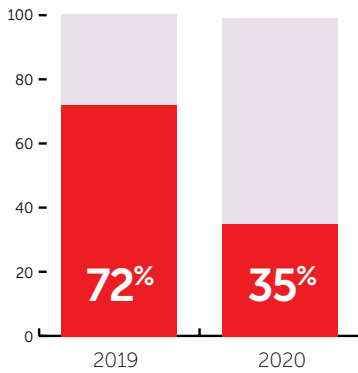
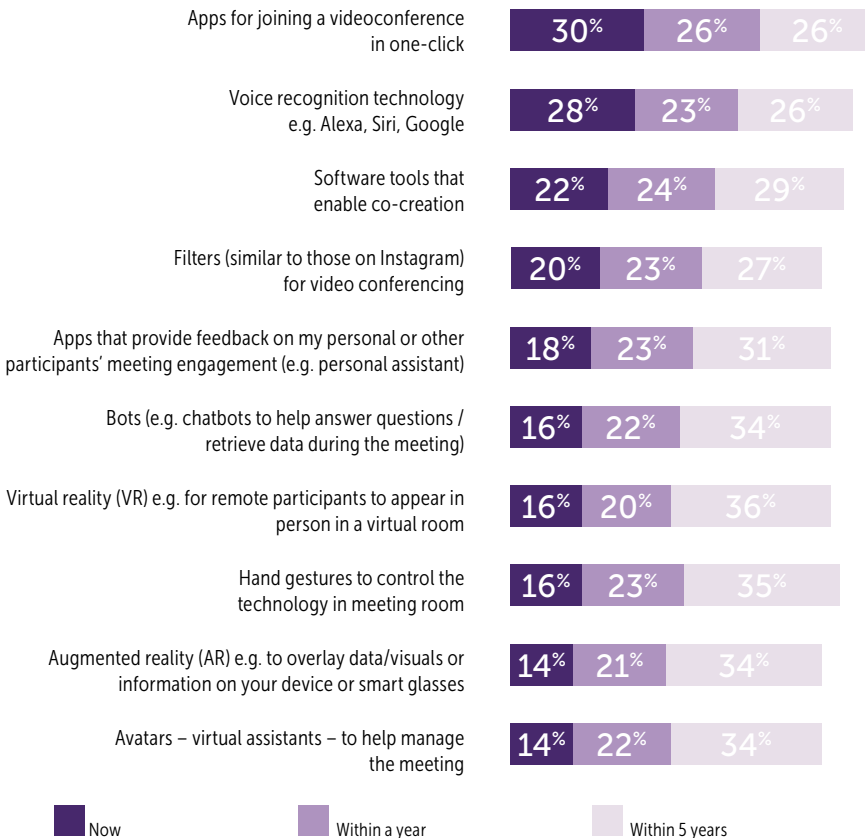


Chart 3: Predicted availability of meeting technologies

% predicting when available



Sidebar on Regional findings:

People around the world have differing expectations over how fast technology is likely to progress in the next two years. Eight in ten Indian respondents predict that voice recognition tools, such as Alexa, Google and Siri, will become widely used in conferencing sessions, while just 35% of French office workers reveal the same level of confidence in their successful integration.

As the use of virtual reality (VR) is beginning to gather pace in other areas, most Indian office workers (87%) and 71% of UAE respondents believe its use to visualize 'in person' remote participants will become standard within the next two years.

Added to this, almost half of Australian (50%), German (46%), UK (45%) respondents expect to see hand gestures used to control meeting room technology within two years. India, however, has higher expectations, with nearly three in four (72%) predicting that our hands will control our meeting experience by 2022.

Outlook for the future: **Finding balance after an unprecedented year of change**

In a year that will be remembered for forcing the corporate and public sectors to take previously unthinkable steps to manage the spread of COVID-19, it has been remarkable how so many companies and workforces have been able to quickly adapt in order to continue operating, despite facing tremendous financial pressures.



The pandemic has made businesses accept a new reality and embrace change in a way that they did not think possible just a few short months ago. But the pandemic did not fundamentally change the world of work, it simply supercharged changes that have been slowly building over the course of many years. We were always going to get to this point: COVID-19 has just brought the timeline forward.

The findings of this study highlight that most employees around the world are not only ready to embrace a more blended approach to work, they have in many cases been patiently waiting for this seismic shift to a hybrid working model to occur. But what's also clear is that the greatest remote working experiment in living history has not killed the office, far from it: employees desperately want to go back to a world where they see and interact with their colleagues face-to-face. They just want to do it on their terms, and with a greater degree of flexibility offered by their employers.

Technology has always been crucial to communication and collaboration, and its importance grew exponentially in 2020. Collaboration technologies provided the vital connection between people during the dark days of lockdown and helped businesses stay in touch and keep operating. But what the pandemic has proved that this isn't enough. Now, investment in workplace technologies must focus on facilitating interactions that are more natural, more authentic, and which bring the humanity back to our virtual interactions. The message comes through loud and clear from the office workers we surveyed: of all the things we want to see our company invest in, collaboration technologies are top of the list. Organizations need to heed this call to action if they are to succeed.

In the long term, businesses will need to be inventive and adaptable in order to rebuild and eventually thrive again in the post-pandemic world. They will need to invest in new technologies, redesign or at least reconfigure their office spaces, and give their employees the tools they need to work in the best way possible, no matter where they are located or how they choose to connect. There will always be a need for face-to-face interaction, we just need to find the right balance between physical contact and virtual collaboration. If they can achieve this blend, supported by the right technologies, and help staff adapt to the raft of changes that are happening to every facet of their lives, they will be fit for the future and ready to deal with the challenges we all face over the coming months and years, and to seize the opportunities that will surely follow.



ClickShare

From the visualization experts

ClickShare Conference

Simple, easy, wireless. That's how ClickShare Conference shares your apps on the room display and connects them to the camera and speakers in the room for better meetings.

Barco is a global leader in professional visualization for Enterprise (from meeting, classroom and control rooms to corporate spaces), Healthcare (from the radiology department to the operating room), and Entertainment (from movie theaters to live events and attractions).

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