

September 2017

Today's Huddle Room Experience Maybe "Adequate" Just Isn't

A Wainhouse Research eBook



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About This eBook

Objectives

Our goal was to understand end-user behavior and preferences when conferencing from a huddle room, including:

- Conference room utilization
- Meeting frequency
- Device and app use in huddle rooms
- Common huddle rooms layouts
- Huddle room issues and problems
- Satisfaction and preferences

Methodology



Survey: "The Future of the Workplace"
n=175
Fielded 6/16 – 6/29/17

Participation Criteria

- End users with experience meeting in huddle rooms
- North America
- Work in commercial enterprises with employee ranges above 250 people

Panel Segmentation

- Power Meeter – the top 1/3 of survey respondents in terms of meeting frequency; n=56
- Average Meeter – the bottom 2/3 of respondents in terms of meeting frequency; n=117

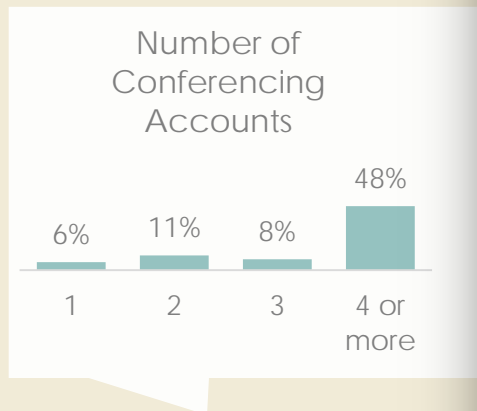
A *GLIMPSE* AT THE WAY WE WORK

The way we work continues to change at a rapid pace.

Case in point: group collaboration. More and more, the way we get our work done is via a collaborative group. The way we meet is changing as well. Long, extended, stale meetings are out – replaced by fewer, but more productive and shorter meetings. Our data shows that conferencing tools have become “standard issue” in the mid-sized enterprise: 75% of that workforce has at least one conferencing account.¹



There is a very interesting story behind this data, however. Most of today’s workforce has access to a range of conferencing services – in fact, almost half receive four or more accounts! The reality here: conferencing is a feature now found within many solutions, from traditional audio conferencing to web conferencing to unified communications (UC) and beyond. This proliferation of tools may reflect the perspective that collaboration is integral to driving workplace performance².



Our work environment is changing, too. Consider almost 40% of US workers telecommute at least one day a week³. Our workforce is increasingly mobile, fueled by a mix of technology and employee preferences. Open-seating floorplans are common, supporting the new mobile workforce, and delivering cost savings to boot.

THE RISE OF THE *Huddle Room*

Swirl these trends together, and you have a continued rise in **huddle room** popularity. These smaller meeting rooms provide a quiet, collaborative environment for groups of 6 or less – a critical space for those enterprises with a collaborative, mobile workforce, and open seating environments.

So ... we surveyed a panel of huddle room users from mid-sized commercial enterprises in North America, asking them just that – what do you do in huddle rooms during conferences?

As researchers, the use of huddle rooms for group collaboration is an important trend, as teams change the way they interact, create, and get their jobs done – but we have many questions. As sponsor of this eBook, Logitech shares our curiosity. Together, we wanted to find out: what’s happening during conferences in huddle rooms?



¹ Source: Wainhouse Research, [2016 Collaboration End User Survey](#), showing enterprise size 250-1k seats; n=250

² Source: Forbes, June 2017, [Collaboration Drives Workplace Performance](#)

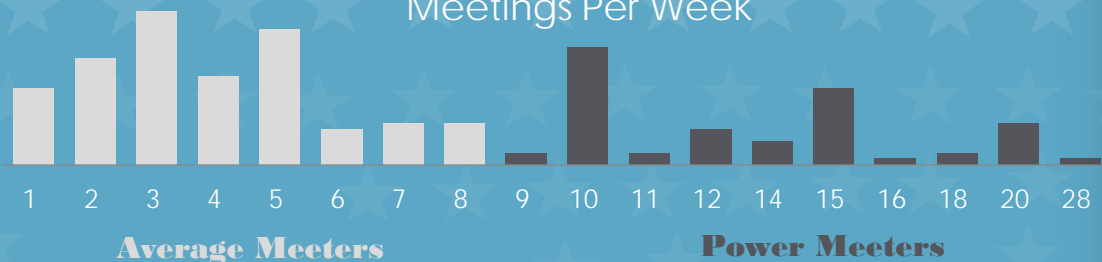
³ Source: [PWC Worklife 3.0 study](#), June 2016

Meet the Power Meeter

We spend all day every day investigating the collaboration industry. One thing we've found over the years: while we all collaborate regularly, a select group collaborates very differently. We segment our survey results to focus on the Power Meeter – the top 1/3 of respondents in terms of meeting volume.



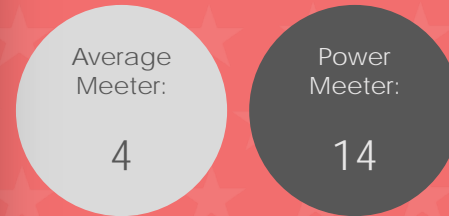
Meetings Per Week



We've found that the Power Meeters can deliver a wealth of insight. Their meeting volume drives an expertise and familiarity with meeting technology. Their tool selection shows which tools are most popular. Overall, they provide a valuable benchmark of meeting behavior.

Perhaps most importantly, their perspectives on what works and what doesn't should lead your strategy and collaboration investments – with the expectation that fine-tuning your environment for the Power Meeters will benefit all collaborators – and may even convert some Average Meeters!

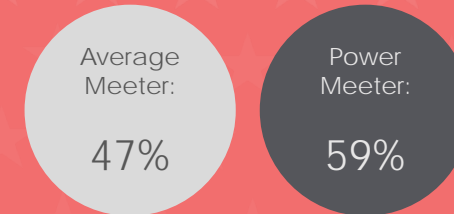
Average Weekly Meetings



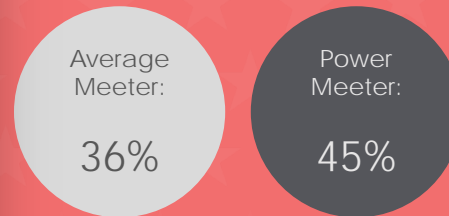
In general, Power Meeters meet a lot – and this survey's group was no exception, with 3.5x the weekly meeting load as the Average Meeters.

They also make good use of their conferencing tools, using audio, video, or web conferencing solutions to meet with virtual participants in almost 60% of their meetings.

Percent of Huddle Room Meetings Involving People Located Elsewhere

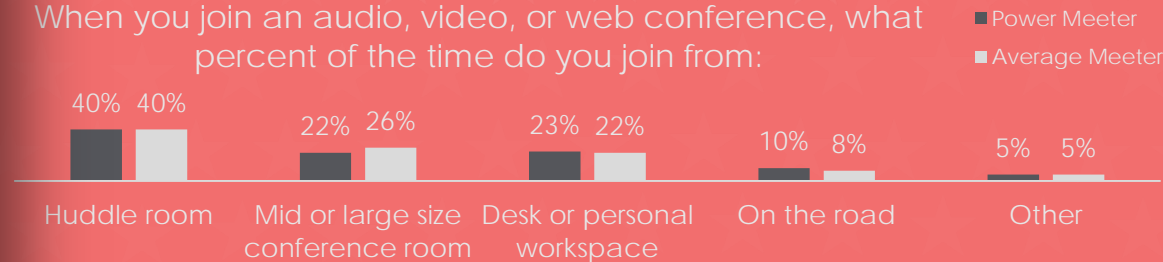


% of Huddle Room Conferences: Alone or with 1-2 Other People



Our PMs are also more likely to join conferences by themselves, or with a small group in the huddle room. By comparison, the AMs are more likely to join huddle room conferences with 3 or more participants.

When you join an audio, video, or web conference, what percent of the time do you join from:



Perhaps most interesting is the fact that these rooms become a "common ground" for conferencing - by far the most popular single location for huddle room users to hold their audio, video, & web conferences.

Huddle Room Conferencing Apps and Devices

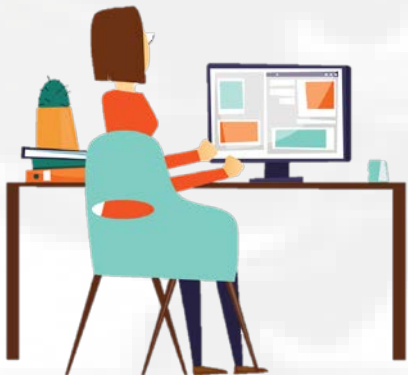
Among those who use huddle rooms ...

Apps Used for Conferencing in Huddle Rooms



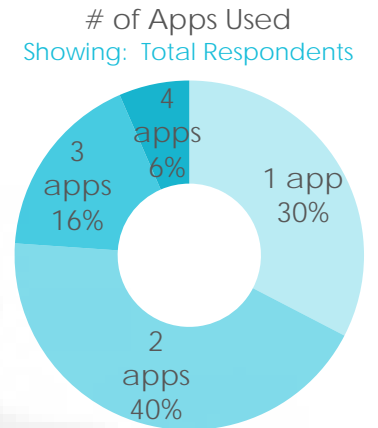
First, almost everyone in this survey uses their huddle rooms for web or video conferencing – only a few noting they don't. That said, Microsoft and Cisco provide the most commonly used apps – with the PMs favoring both much more than the AM crowd.

Devices Used for Conferencing in Huddle Rooms

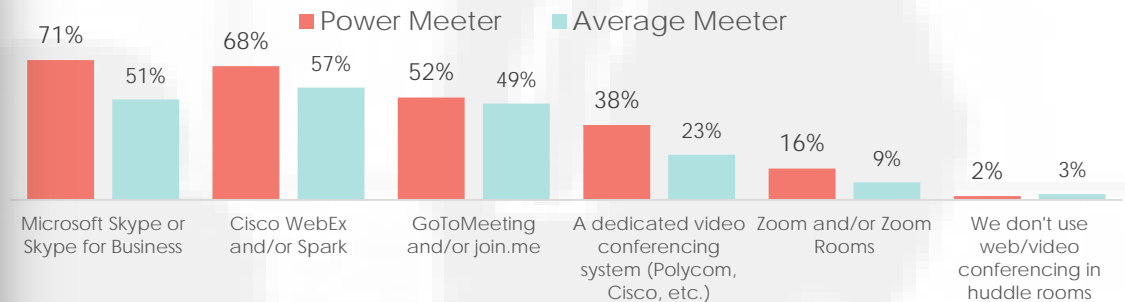


With the rise in app-based conferencing, we are not surprised to see the laptop as the most commonly used device to join conferences in the huddle room. But right next to the laptop is the speakerphone. In fact, our expert PMs are just as likely to join a conference from a speakerphone as they are their laptop. Perhaps we are seeing how hard it is to move users from old habits to new experience. This may also point to gaps in laptop audio quality, and a lack of available peripherals.

Another important observation: Today's huddle room user leverages a mix of apps to support their web and video conferencing needs. Only 30% of the panel uses a single app – and over 20% use 3 or 4 different apps to join web or video conferences. This mix drives a need for flexible conference room equipment – or drives the user to bring their own device to join these conferences.

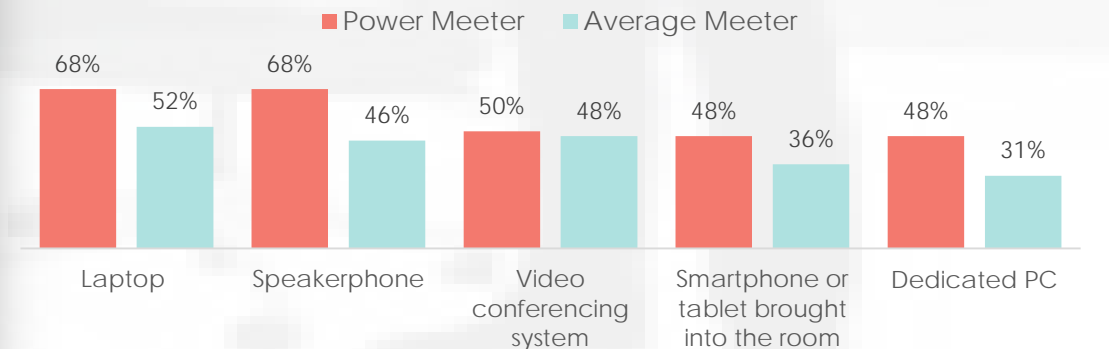


What Apps Do You Use to Join Web or Video Conferences in Huddle Rooms?



What Devices Do You Use to Join Audio/Video/Web Conferences in Huddle Rooms?

Showing: Top 5



HOW WELL DOES THEIR *EQUIPMENT* PERFORM IN HUDDLE ROOMS?

We wondered if these users' huddle rooms were equipped to handle the rise in popularity of audio, video, and web conferences – so, of course, we asked!

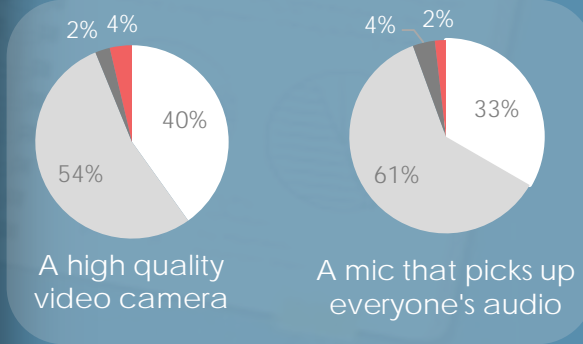
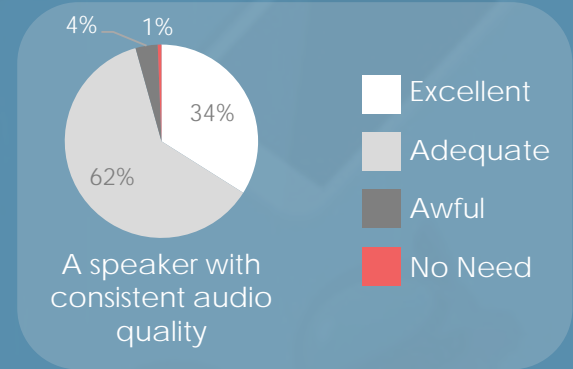
- 1 Speakerphone
- 2 Display
- 3 Video system
- 4 PC with webcam
- 5 USB audio/video device

First, we asked respondents to tell us what percent of the huddle rooms that they used were equipped with devices that enable audio, video, and web conferencing. The results point to the speakerphone as the device found in the majority of their huddle rooms - followed by a display, and then a video conferencing system in third place. These users noted dedicated PCs with webcams, and USB audio and video peripherals as available less frequently – both devices found in less than half of their huddle rooms.

We thought these results aligned well with previous responses that show users joining conferences from a speakerphone, and using their laptops frequently. Separately, these users are connecting their laptop to the in-room display for most of their conferences – with PM's doing this in more of their audio, video, or web conferences than AMs (70% vs 57%).

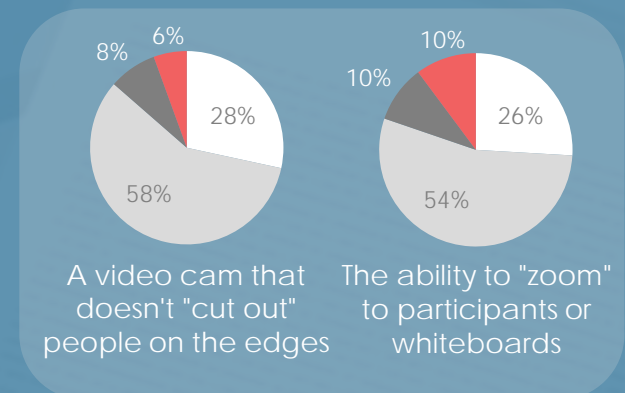
But **the real question** on our minds: Does this mix of technologies meet our huddle room users' needs? Or, does the user feel the technology is holding them back? So we asked them if they were satisfied with how well their huddle rooms were equipped with devices that support high quality audio and video conferences.

What we found: Most respondents felt their huddle rooms were well equipped for audio, video, and web conferencing. In fact, over 80% felt their huddle room equipment was "adequate" or "excellent" across every question we asked in this category.



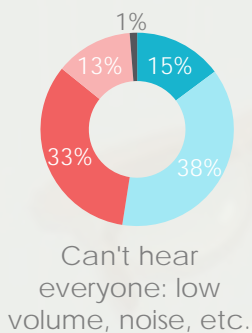
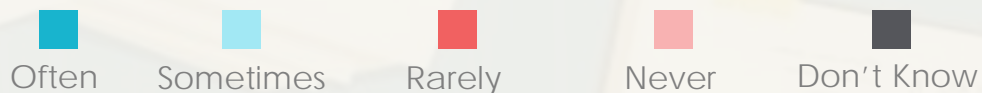
Respondents felt their huddle rooms were well equipped for high quality audio and video – with almost 95% noting their video cameras and microphones were "adequate" or "excellent".

And most – over 80% - felt their camera's field of vision and ability to "zoom" was "adequate" or "excellent" as well. If there was any crack in the huddle room's conferencing armor, it might be in the "zoom" category - 10% felt their solution was "awful" at this.

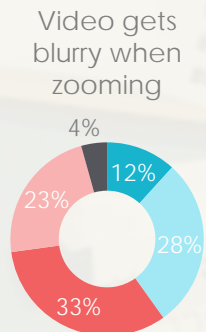
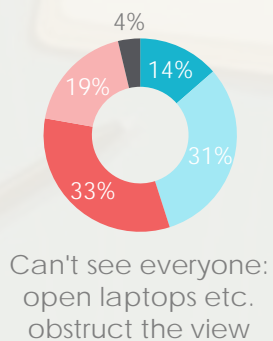
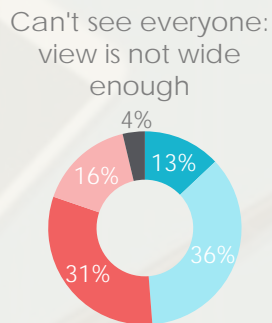
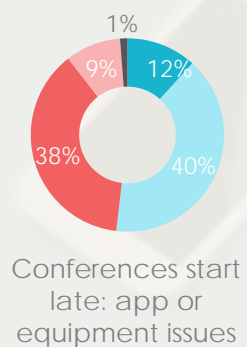


Hitches in Huddle Room Conferences

While these huddle room users indicate that their rooms are at least adequately equipped to support high quality conferences, they had a different story when it comes to the actual conferences themselves. We asked specifically if respondents experienced issues during audio or video conferences with other huddle rooms – looking to see if their actual experiences match their equipment perspectives.



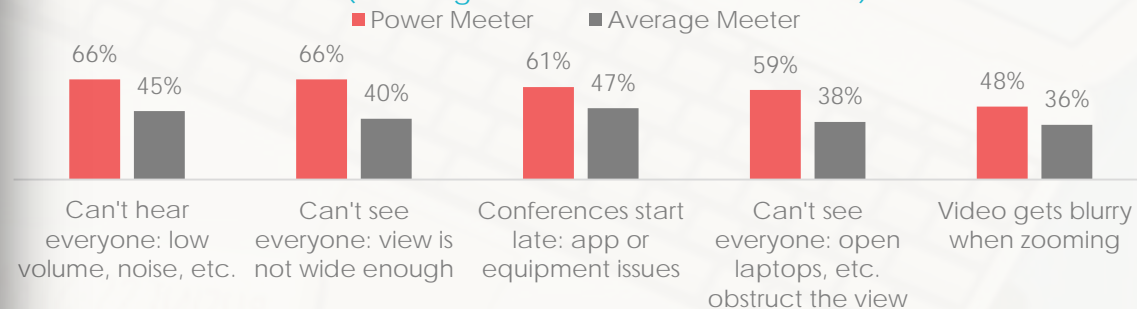
What we found: Most of these respondents experienced issues – either “sometimes” or “often.” The most common gripe: I can’t hear everyone. This was followed by meetings starting late, difficulty seeing everyone in the room, and laptops or other clutter obscuring the view. Blurry images when zooming was the least of this panel’s worries.



Things got really interesting – to us, at least – when we compared the Power and Average Meeter responses. On average, more PMs experienced issues than their AM brethren – by a material percent! Let’s dig into the data:

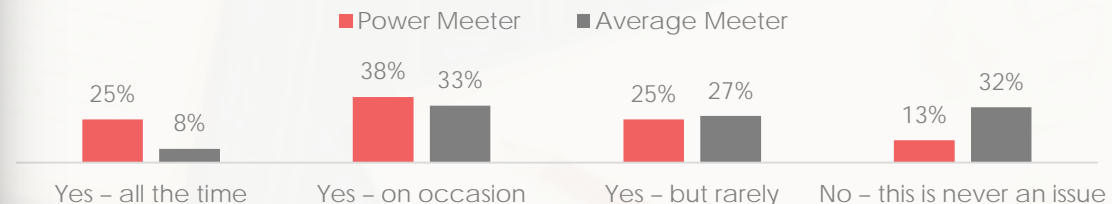
When conducting an audio / video conference with participants located in other huddle rooms, do you experience these issues?

(Showing: “Often” and “Sometimes”)



Across the board, more PMs noted they had issues, at least “sometimes,” than the AMs. Challenges hearing and seeing everyone were the most common gripes for our PMs in this survey.

When conferencing from a huddle room, do you ever have too many laptops (or other things) on the table at once and not enough table space?



Our Power Meeters also pointed to challenges with clutter on the huddle room table, more-so than the AM respondents. This, despite the fact that they tend to join conferences in smaller groups, on average – perhaps pointing to PMs as more technical users, toting more gear with them.

Summary Analysis

This survey of huddle room users reinforced a few expectations: Speakerphones are still most common device found in the huddle room, followed by a display. Users tend to use a combination of speakerphones and their laptops to start and join conferences. And video and web conferencing are popular forms of collaboration within the huddle room.

However, this research uncovered an important **disconnect between** a user's **perception** of their huddle room equipment **and** the **reality** of their conferencing experience. On the one hand, these users felt their huddle rooms are adequately outfitted with high-quality devices – with many noting their equipment was excellent! The message seemed clear: “Our rooms have excellent speakers and microphones, capable of consistent, high quality audio ...” “Our huddle room video cameras deliver high quality video, that doesn't cut people out on the edges ...”

But when asked about issues with their actual experience, we heard a very different story: “Well, I *do* have issues hearing everyone on the far end ...” “Now that you mention it, I have had issues with the video cutting people out on the edges ...”

Now, in all fairness, we played a bit of a trick on our survey respondents – we asked the same question in two different ways, gathering feedback on their satisfaction with huddle room equipment, followed by issues with their actual experience. The contrast between responses is telling: **users are experiencing issues during huddle room conferences, but aren't attributing them to the equipment or services that directly support that experience.**

We also found the experience gap widens with our Power Meeters – the ones generating the most amount of conferencing in the huddle room. This reveals that the familiarity or expertise with the equipment is not what's standing in the way of a quality experience – in fact, it shows that **“the more you use, the more likely you are to experience issues.”**

Another important observation: we tend to focus on the Power Meeters for good reason: *they provide a “leading” indicator* in the huddle room discussion. It's your heaviest users who can best tell you what's working, and what's not. However, it's clear that even our power users are not necessarily experts with the equipment that their organization provides. On the other hand, our users – and especially our power users – are more qualified to provide feedback on their actual experience; feedback that will enable the enterprise to adapt its equipment and services to improve everyone's conferencing experience.

To this point, we think it's important to dig into the Power Meeter's concerns, looking for the root cause behind any issues they experience on a regular basis. It stands to reason: if you deliver the equipment and solutions that enhance their conferencing experience, you maximize the benefit across your organization – and you may just convert a few average users to power users at the same time!



Hardware In the Huddle Room



Today, there are a number of vendors providing solutions designed to address the needs of the huddle room user. Case-in-point: Logitech, the sponsor of this eBook, recently introduced MeetUp, a USB device designed to support an increasing volume of huddle room audio and video conferences.

MeetUp is equipped with a camera boasting 4K resolution and a super-wide 120-degree field of view, making it easier to see every seat at the table – especially when the camera is closer to the participants.

The device’s integrated speaker is optimized for huddle room acoustics, and it includes three beamforming microphones – in addition to an optional on-table mic as well.

Logitech MeetUp can be mounted to a display, on a wall, or set on a table top – flexibility intended to reduce additional on-table clutter.

Logitech asked the survey audience if they thought their huddle rooms would benefit from a video device providing these features. The results: 90% of these huddle room users said they would consider it, and just over 2/3’s said “yep!”

And those Power Meeter’s we keep talking about? Well, almost 75% replied with a firm “yes.”

itopia, a leading cloud migration provider, has been using the Logitech MeetUp as an early adopter. Here’s what they have to say about their experience:

“...We’re really excited about the MeetUp system. We really like the small footprint compared to other products on the market at an unbelievably reasonable price point.”
-Jonathan Lieberman
Co-Founder and CEO,
itopia

“...I can already see the wide angle is a game changer, especially because we have a small conference room. We can fit more people closer to the camera, so in addition to the good video and audio quality that is definitely a must have that we couldn’t live without, today.”
-Ubaldo Don
Co-Founder and CTO, itopia



About Wainhouse Research

Wainhouse Research is an independent analyst firm that focuses on critical issues in the unified communications and collaboration market. The company provides 6 different vendor subscriptions covering unified communications, group videoconferencing, personal & web-based collaboration, audio conferencing, streaming & webcasting, and distance education & e-Learning solutions, as well as a single all-inclusive subscription for enterprise users. The company acts as a trusted advisor providing strategic advice and direction for both the UC&C industry and its enterprise users. For further details contact sales@wainhouse.com or see <http://www.wainhouse.com>.

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