



COLLABORATION 2.0

DEATH OF THE WEB CONFERENCE (AS WE KNOW IT)

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Methodology

This paper was written by Ovum in collaboration with **join.me** by LogMeIn. The research and analysis contained herein is based on original, independent research by Ovum.

The survey instrument comprised 38 questions and the responses were gathered through a web-based survey program with 3,926 full time employees across 19 international markets, with regions covered including Europe (1,173), Asia Pacific (1,170), North America (1,040) and Central and Latin America (543). The industry scope spans all major industry categories, including both public and private sector.

The survey and panel method employed for this study employs the same as that used for Ovum's annual employee-centric IT consumerization survey. This has been a key source of insight for enterprises since 2009 as a means to measure evolving employee needs, behavior and expectations in the workplace.



Introduction

It comes as no surprise that the sheer volume of meetings is on the rise for today's average employee. Nor should it come as a shock that the vast majority of today's employees report they get little or no value out of most of the meetings they attend. Yet, few workers would argue that communication and collaboration are critical to achieving their goals.

This disconnect is less an indictment of meetings themselves than it is a reflection of the proliferation in the types and locations of the modern meeting, the rise of today's highly mobile, consumerized workplace, and the tools most companies employ to facilitate such collaboration.

RAPID PROLIFERATION OF MEETING TYPES AND LOCATIONS.

Modern meetings bear little resemblance to the formal, pre-scheduled boardroom gatherings of the past. Today, more than a third of all meetings are ad hoc – impromptu or 'drive-by' meetings that are neither pre-scheduled nor formal in nature.

Nearly half of all meetings are 1-on-1. And more than 1/3 are virtual, with at least some participants attending from the road, remote offices or virtually anywhere with a phone or Internet connection.

RISE OF THE HIGHLY MOBILE, CONSUMERIZED WORKPLACE.

Today's connected employee is looking to use their device of choice, whether corporately provisioned or personally owned, and do their job wherever and whenever they want. Tablets and smartphones are replacing the venerable PC as the virtual meeting tool of choice. Meanwhile, the pervasive nature of cloud apps means this personal choice isn't just limited to hardware.

When it comes to sharing information in today's meetings, the modern employee is turning to cloud-based collaborative document editing (e.g. Google Docs), cloud file sync and sharing (e.g. Dropbox, Cubby, Box), VoIP communication tools (e.g. Skype), and screen sharing tools (e.g. Glance, join.me) – most selected and introduced by employees themselves. This is often in addition to or in place of traditional web conferencing tools provided by their employers.

DRAMATIC INCREASE IN THE NUMBER OF MEETINGS.

It's not just a perception. More than 50 percent of employees report that the number of meetings they have is increasing. This is most acute with modern executives, who report, on average, 17 meetings per week. Ovum has explored these changes in workforce behavior, patterns in meeting habits and effectiveness, and their growing need for tools that are designed to support these behaviors.

While there are many studies on enterprise mobility and the impact of IT consumerization, this is the largest study of this kind undertaken on the specific topic of changing physical and virtual meeting behaviors and the evolving requirements of the collaborative workforce for virtual collaboration and web conferencing.

Key findings

- Employees are having more meetings than ever before, with 91% of all employees surveyed saying that the number of meetings they are having is static or rising.
- An increasingly collaborative, connected workforce is fueling rapid growth in ad hoc one-on-one meetings, which now account for more 43% of all one-on-one internal meetings, and 35% of all one-on-one external meetings.
- 32% of all meetings are virtual, a trend that skews higher for younger workers (age 26-35) who report that 38% of all of their meetings are held virtually.
- Meanwhile, 67% of employees report that more than half of the meetings they attend are not of value.
- Late start times cited as key reason that meetings are perceived to fail to deliver value – this is costing executives nearly 3 hours a week – or 5 24-hour days and 19 hours per year – in lost time and productivity.
- Traditional web conferencing tools are viewed to be a poor fit for ad hoc meetings and one-on-one meetings, often being cited as a key a reason for meeting delays and inefficiency.
- Due to the frustration with traditional web conferencing tools, 66% of corporate buyers are looking for new collaboration solutions that are a better fit for changing workforce behavior.
- The era of the dominance of the PC and projector in the meeting room is coming to an end with employees increasingly taking devices such as tablets and laptops into the meeting room, blurring the lines between what is a physical and what is a virtual meeting.

The meeting explosion

WE'RE IN MORE MEETINGS NOW THAN EVER BEFORE.

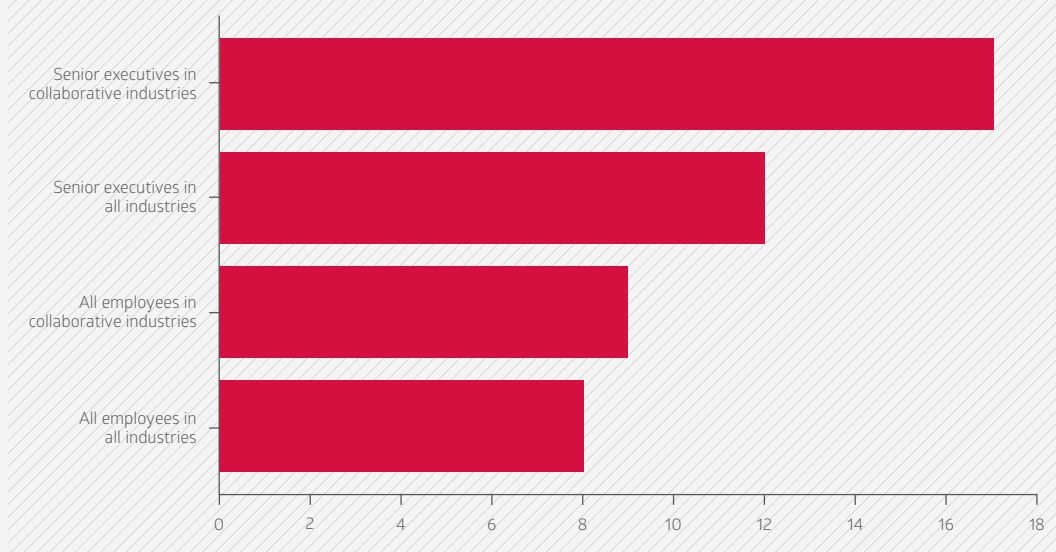
Our calendars are full. From small enterprises to the world's largest multi-national corporations, junior employees to CEOs—our work weeks are now dominated by meetings. Eight meetings per week, on average, across all employee types and company sizes, rising to 10 meetings per week for

all employees above junior level, and 12 meetings per week for executive management and higher. And for VP, director and c-level roles in highly collaborative industries—such as financial services, technology, media and cpg—that number rises to an average of 17 per week.

FIGURE 1

Employees meet 8 times per week on average. Senior executives in high tech, collaborative industries meet 17 times per week on average.

Average number of meetings per week.



The future looks busy

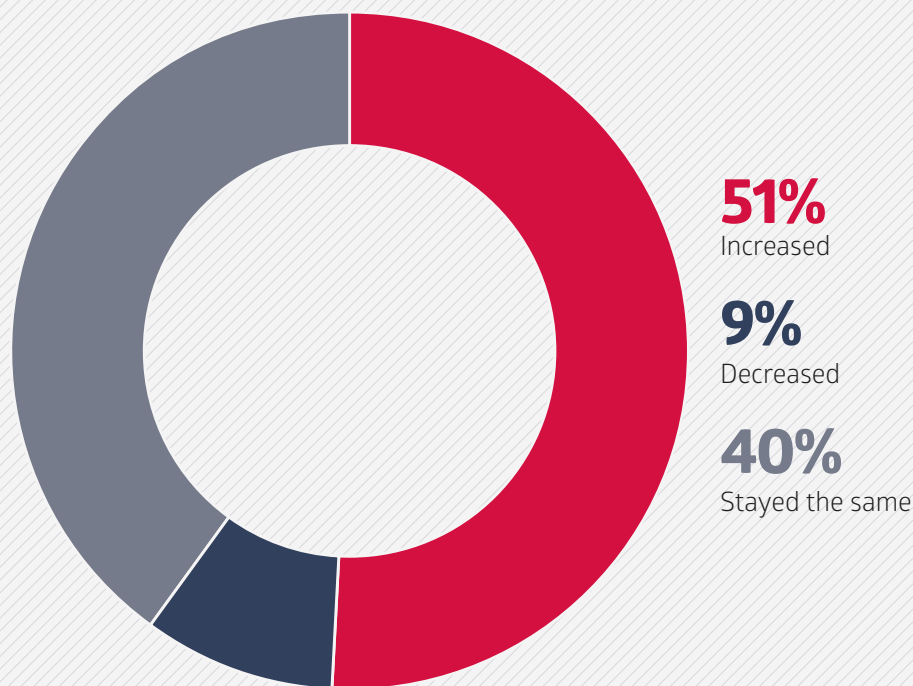
A WORKFORCE SPENDING MORE AND MORE TIME MEETING.

We're already participating in a staggering number of meetings today—and that number is only growing. 91% of all employees surveyed believe that the number of meetings they are having is static or rising. VP/executive level managers are seeing the greatest increase, with 61% reporting a rise in the number meetings they are organizing or being called to over the past 24 months.

FIGURE 2

91% of all employees surveyed believe that the number of meetings they are having is static or rising.

How do you think the number of meetings that you have changed over the past 24 months?



This isn't working

FOR THE MODERN WORKFORCE, MODERN MEETING INEFFICIENCY IS UNACCEPTABLE.

Meetings aren't inherently unproductive. With the right attendees and the right tools, they're the essence of the connected, collaborative economy. Used and managed effectively, they're a valuable resource for generating ideas and plans of execution. But this workforce, drawn into a growing number of meetings, is missing the right tools to get the job done.

The number and growth of meetings is not a problem in itself– it's the value of each meetings. Meeting attendees – and organizers – overwhelmingly feel that meetings are not worth the time they are spending in them.

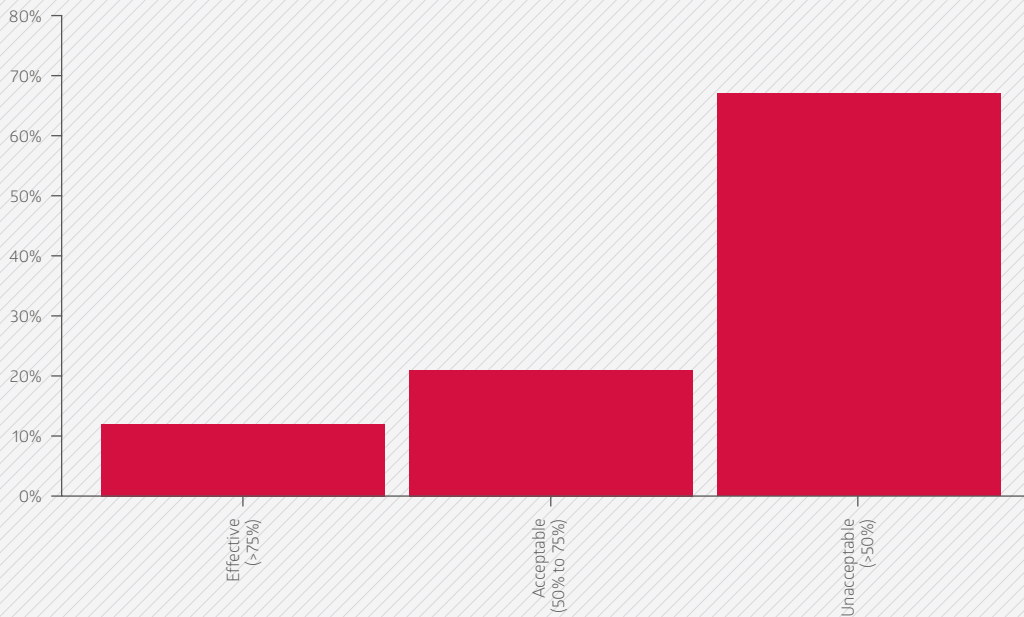
For the purposes of analysis, we define "efficient" meeting behavior as any organization where at least 75% of meetings are worth the time spent on them. "Acceptable" meeting behavior, while still far from optimal, is where employees are reporting that between 50% and 75% of meetings are worth the time spent on them.

We define "unacceptable" meeting behavior as where employees are reporting that less than 50% of meetings are worth the time spent in them. We see that 67% of respondents report that they are experiencing unacceptable meeting behavior in their organizations, with more than half of meetings not being worth the time these employees spend in them.

FIGURE 3

For 67% of employees, only 1 in 2 meetings are of value. The norm is inefficient meeting behavior.

What % of your meetings do you feel are worth the amount of time you spent in them?



Collaboration is changing

MEETING TYPES ARE GROWING AND EVOLVING – AND SO ARE OUR NEEDS FOR EXECUTING THEM.

Our need for new meeting tools is being driven by the types of meetings the workforce is having. For example 48% of meetings the workforce is having are one-on-one, not group meetings. 29% are one-on-one internal meetings.

Over the past 24 months, users have seen growth in the types of meeting that they find themselves participating in across all meeting types, both one-to-one, group, internal and external. The largest growth in participation is in one-to-one internal meetings, with 43.9% of workers reporting growth of this meeting type. The smallest growth is for group internal meetings with 39.46% stating that they are participating in these meetings more. Growth is high. The variance across type is small.

This high proportion of smaller, ad hoc meetings highlights an additional challenge traditional web conferencing tools pose to the modern worker: they're designed for use by large groups, not for highly-connected employees more inclined to one-on-one collaboration. Do individuals really want to go through the convoluted process of setting up a web conference when they are just engaging with one person?

FIGURE 4

The types of meetings being had/held.



29%
One-on-one internal (you and one other colleague)

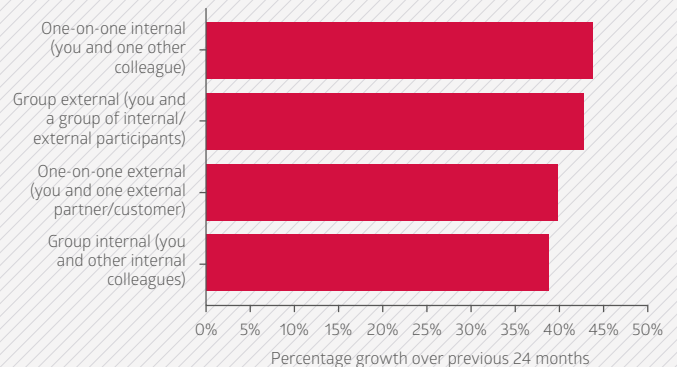
18%
One-on-one external (you and one external partner/customer)

36%
Group internal (you and other internal colleagues)

17%
Group external (you and a group of internal/external participants)

FIGURE 5

Meetings of all types are growing.



Virtual meetings are on the rise

32% OF ALL MEETINGS ARE NOW BEING CONDUCTED VIRTUALLY.

Web conferencing and collaboration tools, and even telephony and email, have given the workforce some capability to conduct meetings in a virtual capacity. Across the full sample, we see that 32% of all meetings are conducted virtually today.

However, there is a generational effect. Age ranges that we can broadly identify as Generation Y (age ranges 26 to 35) are conducting a relatively greater portion of their meetings in a virtual capacity, averaging 38%. Predictably, these young professionals are relatively more comfortable communicating and collaborating in a virtual space.

The number of meetings that are being held virtually has also grown, with only 5% of respondents reporting any negative trend in virtual meetings over the past 24 months. Generation Y employees in particular are reporting a steep growth in virtual meetings over this period, with 61% stating growth in one-to-one meetings held virtually over the past 24 months.

FIGURE 6

The share of all meetings that are held as virtual meetings is high and skews higher for younger employees.

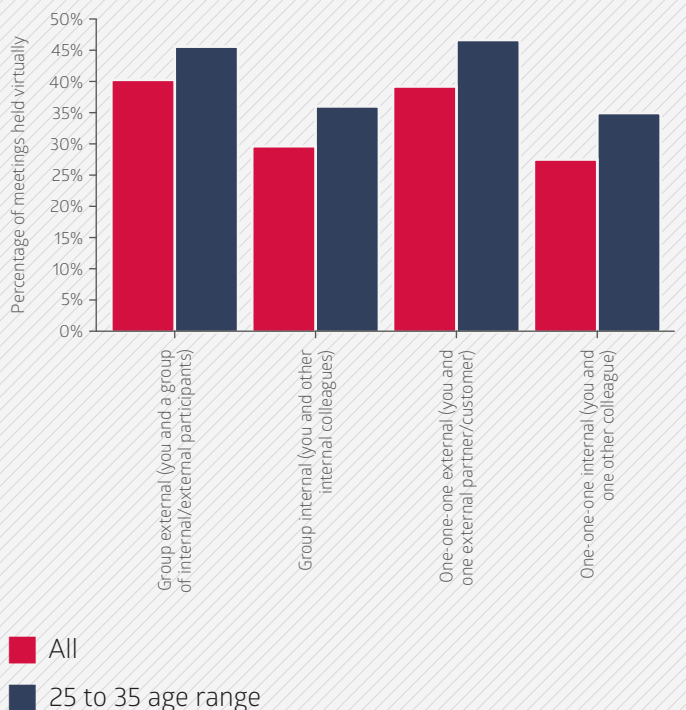
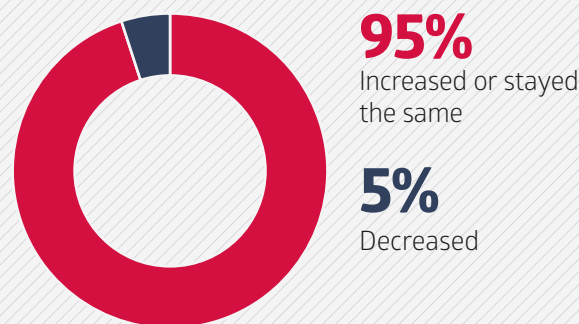


FIGURE 7

95% of employees are reporting that share of meetings that are held as virtual meetings has risen or stayed the same over the past 24 months.

How has the share of these meeting types that are held virtually changed in the last 24 months?



The rise of the ad hoc meeting

AS THE WORKFORCE EVOLVES, MORE AND MORE MEETINGS ARE IMPROMPTU.

As businesses and employees are increasingly internally and externally connected, the atmosphere drives increasingly agile behavior. This is reflected in the rise of the ad hoc meeting, where rather than scheduling in advance to set a time and physical or virtual location, workers are arranging and holding impromptu meetings in real time to get the job done rapidly and effectively. Today across all meeting types, 35% of meetings are ad hoc and this number is rising with 40% of workers reporting that over the past 2 years they have been holding more meetings this way.

Ad hoc meetings are a manifestation of a more collaborative workspace and a signal of business agility. But again there is a tools challenge. Fundamentally old style web conferencing solutions are not geared to this kind of real time meeting and collaboration. They are geared to a more formal, pre-scheduled meeting format. The workforce needs agile tools that give them a true alternative to telephone and email.

FIGURE 8

40% of employees reporting that ad hoc meeting behavior is increasing.

Change in ad hoc meetings as a share of all meetings in the past 24 months.

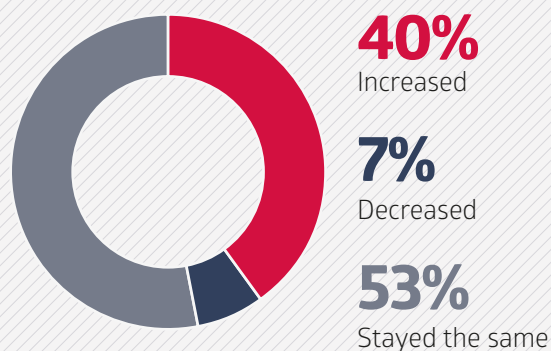
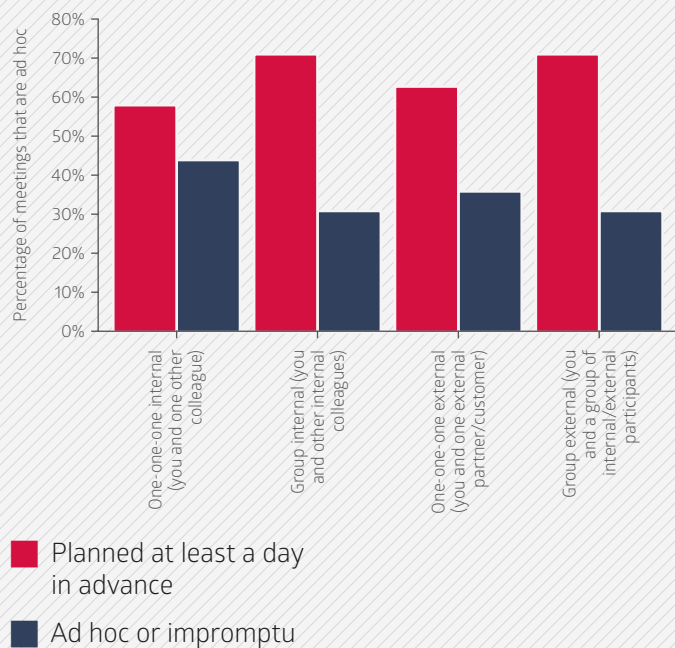


FIGURE 9

Ad hoc meetings are growing as a share of all meetings.

Thinking about how different types of meetings are planned, please indicate the approximate share for different meeting types that are planned at least a day in advance, and for those that are ad hoc or impromptu.



The dial-in is still the standard

WE'RE PHONING OUR WAY THROUGH THE WORKDAY.

The continued dominance of direct dial telephony over collaboration platforms is perpetuating the continued use of email as a document-sharing tool (30% of all employees), despite email's inherent problems. As a document collaboration tool, email frequently stumbles with speed of transmission, file size, synchronized document navigation and compatibility on different device types – a key consideration on smartphones and tablets.

Beyond email, it is common to share documents in the meeting invite, combining the scheduling and document

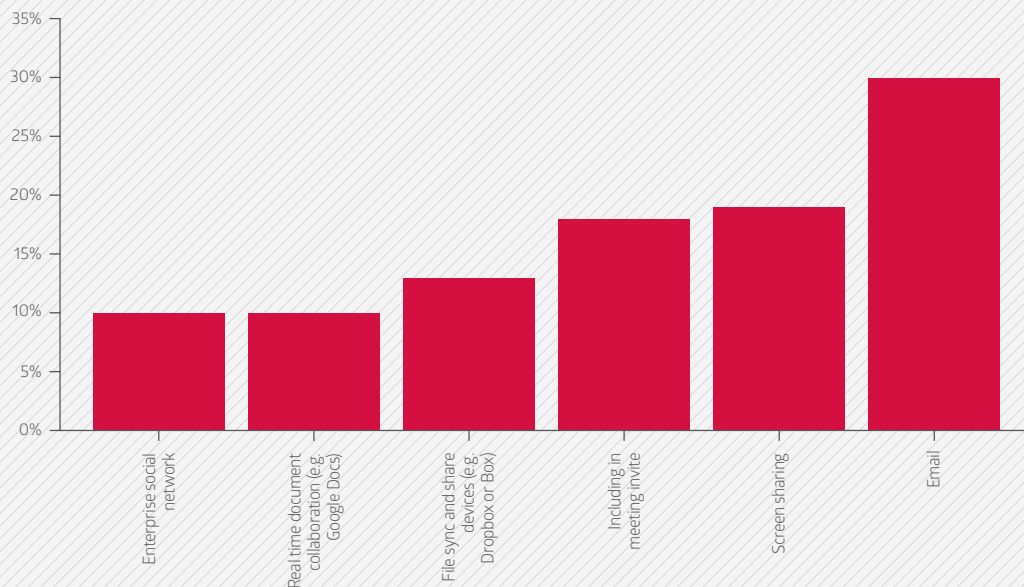
email processes into one. However, the second most frequent method is in fact screen-sharing, which bypasses many of the file and speed based challenges of email, and allows for synchronized, collaborative document navigation.

When we're not using phone or email, we're audio conferencing, web conferencing and video conferencing. However, traditional web conferencing solutions offering integrated voice and collaboration tools within a single platform are being rejected in the one-to-one use case because they are excessively complex to use.

FIGURE 10

Email is still the dominant tool for sharing documents and document visuals during meetings.

Please select the most common methods you use / for sharing documents and document visuals during these meeting / types when they are held virtually.



Connected employees are changing everything

MOBILE AND NOMADIC DEVICES ARE BLURRING THE LINE BETWEEN PHYSICAL AND VIRTUAL MEETINGS.

73% of workers are taking a laptop, smartphone, tablet or combination of these into in-person meetings. The connected employee is armed with these devices and used to being connected so it is natural that they are being used in meeting environments.

The projector has competition as the sole canvas for collaboration in the meeting room. 55% of workers are using smart devices to share documents and visuals with other

meeting participants as an alternative to only using a projector or monitor. Both methods are viewed as more cost-effective and environmentally sustainable than printing hard copies. The use of virtual tools such as screen sharing and web conferencing in live meetings have the advantage of being more inclusive for virtual meeting attendees, important for an increasingly mobile workforce.

FIGURE 11

Users are commonly taking laptops, smartphones and tablets into face-to-face meetings.

Do you generally take a laptop, smartphone or tablet device into face-to-face meetings?

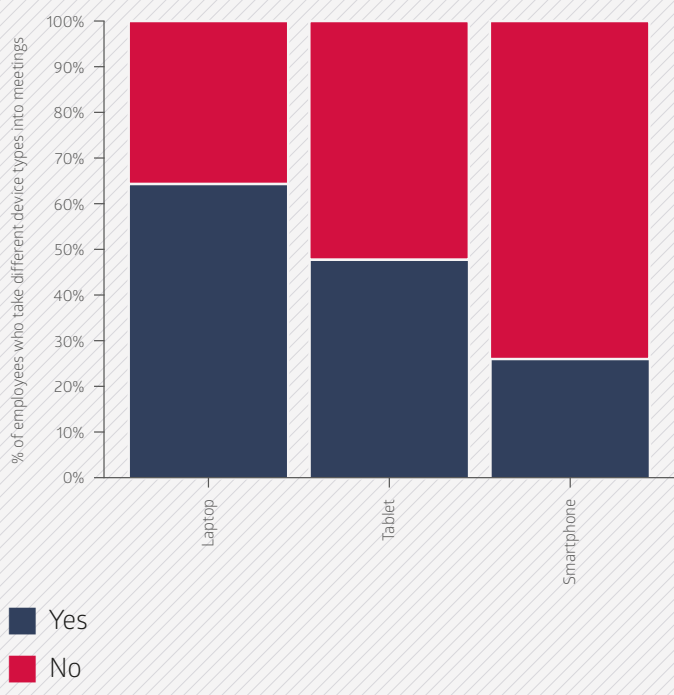
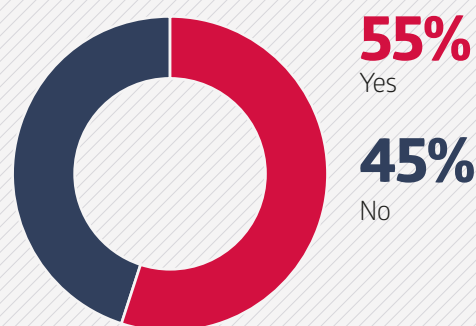


FIGURE 12

Screen sharing is being used as an alternative to projectors in face-to-face meetings.

For in-person meetings, do you ever share presentations documents with participants using screen-sharing web conferencing as an alternative to using a projector monitor?



The workforce appears to be camera shy

VIDEO CONFERENCING IS SEEING GROWTH BUT REMAINS NICHE, DESPITE A PROLIFERATION OF OPTIONS.

Workers today have a growing range of tools for video conferencing, driving growth in the number of meetings involving video conferencing. Over the past 24 months, 39% of workers report that the number of video conference meetings they attend has risen.

However, its usage remains infrequent for the majority, with 62% of workers infrequently or never using it for work purposes. Despite our growing consumer use of video conferencing apps such as FaceTime, Skype Video or Google Hangouts, usage in the enterprise is still limited. This is not to say video conferencing isn't valuable. Instead, its value is more apparent in only certain types of meetings rather than broadly across all meeting types.



Starting late is the new norm

UNACCEPTABLE LEVELS OF LATE START TIMES ARE COSTING US MILLIONS.

Difficulties in scheduling and joining meetings are causing meetings to start late at unacceptable rate. 68% of workers experience that up to 95% of meetings start late, a key reason why an unacceptable number of meetings are perceived to have no value.

Just as it is unrealistic to expect all meetings to be of value, so would it be to expect all meetings to start exactly on time. If less than 5% of meetings start late that is efficient meeting behavior. 6 to 25% of meetings starting late is just acceptable. But when over 25% or more than 1 in 4 meetings start late then that is an unacceptable level.

However, 33% are experiencing this unacceptable level of delayed starts, with only 32% experiencing efficient meeting start time performance. It's not surprising that we feel many meetings are not valuable given this opportunity cost on our time, even if we are trying to multitask during these wait periods. Across all industries and the average proportion of meetings that start late is 22%, more than 1 in 5 of every meeting.

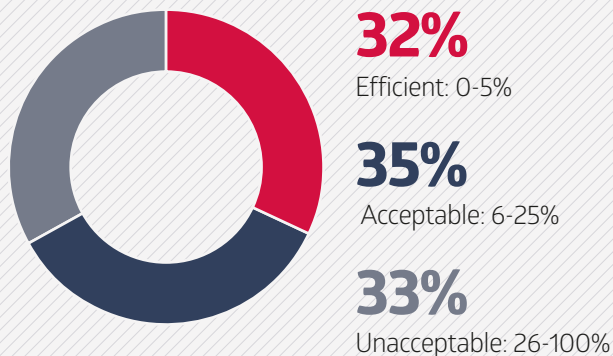
Not only are the majority of meetings starting late, but the average delay time is also meaningful. According to respondents, when a meeting is delayed, it is delayed by an average of 10 minutes, 40 seconds. For senior executives, that figure rises to 15 minutes, 42 seconds. With a 64% chance of more than 5% of all meetings starting late, a senior executive participating in 17 meetings per week will lose 2 hours 50 minutes per week, or assuming 245 working days per year, 5 days 19 hours per year.

For an executive on a salary of \$150,000 per year, this equates to wastage of \$3,544 in terms of salary cost. If we assume an expected return on salary of 5X, the total hit to employer revenues is \$17,720. And if we assume it is a medium sized enterprise with 300 senior executives, that total revenue hit is \$5,316,000.

FIGURE 13

Efficient vs. unacceptable levels of late meeting start times.

What % of meetings you attend or set up start late?



Total revenue hit is \$5,316,000.

WE'RE LATE BY 10 MINUTES, 40 SECONDS – RISING TO 15 MINUTES, 42 SECONDS FOR SENIOR EXECs.

FIGURE 14

Average delay per late meeting is 10 mins, 40 secs for all employees.

Average meeting delay time.

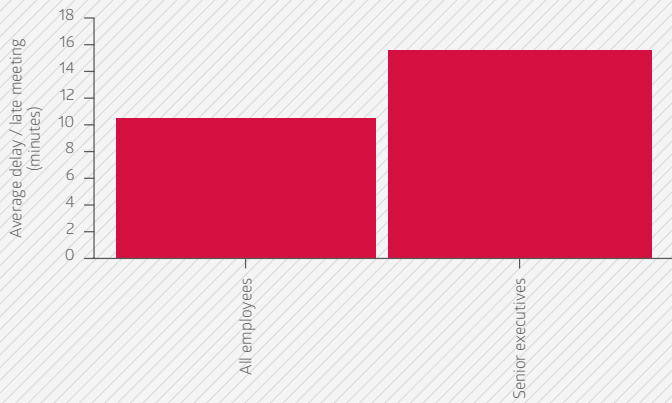
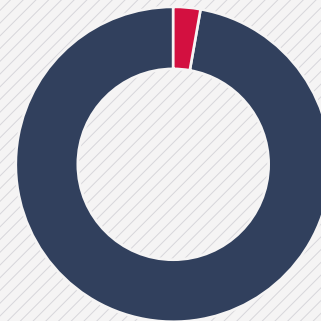


FIGURE 15

Annual time lost due to delayed meetings for senior executives.



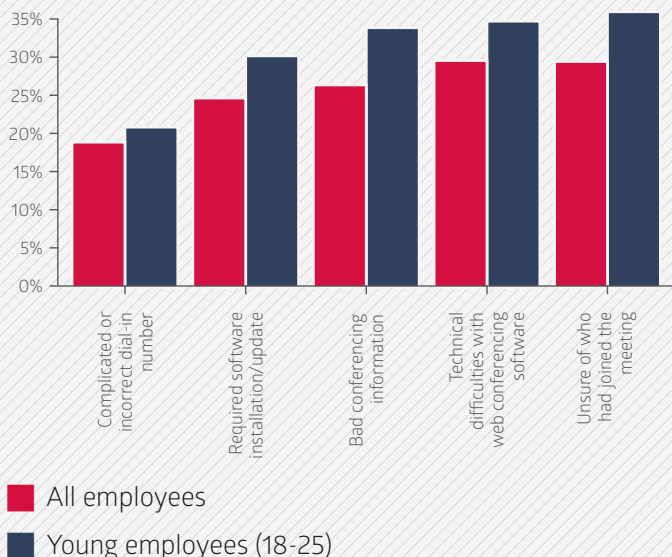
5 days, 19 hours

Annual time lost due to meeting delays.

FIGURE 16

Meetings start late because of technical difficulties and uncertainty over who has joined.

What are the reasons that meeting start late?



This amounts to 5 days, 19 hours per year.

Please hold for technical difficulties

TROUBLE WITH WEB CONFERENCING SOFTWARE IS MAKING US HABITUALLY LATE.

For the modern worker, it has become an all-too common refrain at the top of a majority of their meetings: "Sorry, we'll get started soon – we're just some having technical difficulties." Indeed, technical difficulties and usability struggles with web conferencing software is the number one contributing factor to meetings starting late, closely followed by the challenges of checking who has joined the call – the roll call process that can eat into available meeting time. Moreover, we have seen that the same users who are doing more one-on-one and ad hoc meetings are technically ill-suited for traditional web-conferencing solutions – it simply doesn't work they way they work.

We also see that client software updates and poor conferencing information shared in the formal pre-meeting scheduling process are also major contributors. Likewise, these are major characteristics of traditional web conferencing solutions.

The need for more agile and easier to use web conferencing tools is clear. The use of old tools ill-suited for the needs of the new agile, collaborative workforce costs businesses valuable time and money.

From traditional web conferencing to self-sourcing

THE CONNECTED WORKFORCE IS CIRCUMVENTING BARRIERS TO PRODUCTIVITY.

The pain of traditional web conferencing tools is driving employees to self-source. A key characteristic of the consumerized workplace is that employees will find a way around legacy IT systems that do not deliver the user experience they are used to through their usage of intuitive web apps. They're also working around the existing resources and processes if they hinder them from doing their job effectively in a way that fits with their lifestyle.

The cost of the using old web conferencing tools for functions they are not designed for can also be measured in lost sales. In this study, Ovum specifically engaged sales

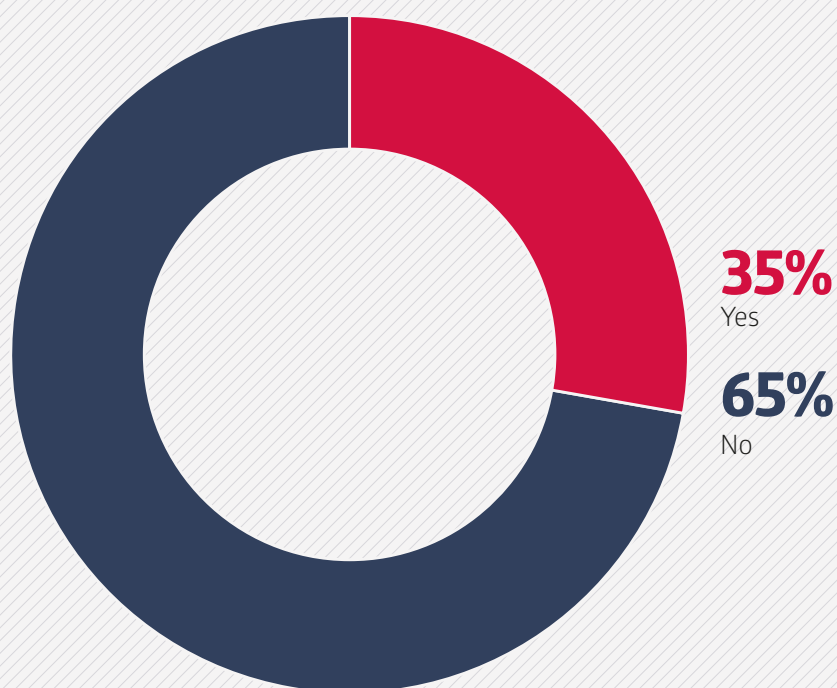
professionals who are regular users of web conferencing tools. 30.3% of sales professionals believe that the web conferencing tools they are using today are in fact a material hindrance to sales, rather than the enabler of sales that they should and need to be.

This has been the driver for BYOD in the enterprise. It has been the catalyst for BYOA in the enterprise. And this macro trend is evident in the case of web conferencing and collaboration tools. 65% of all workers have a backup conferencing or collaboration tool to use instead of the company provisioned conferencing tool.

FIGURE 17

Employees are self-provisioning tools rather than use the company-provided solution.

If your web conferencing solution is difficult to use, do you ever use other solutions in addition to or instead of the company-provided solution?



Decision makers are ready for a change

66% OF CONFERENCING BUYERS ARE ALREADY LOOKING FOR A NEW MEETING PLATFORM.

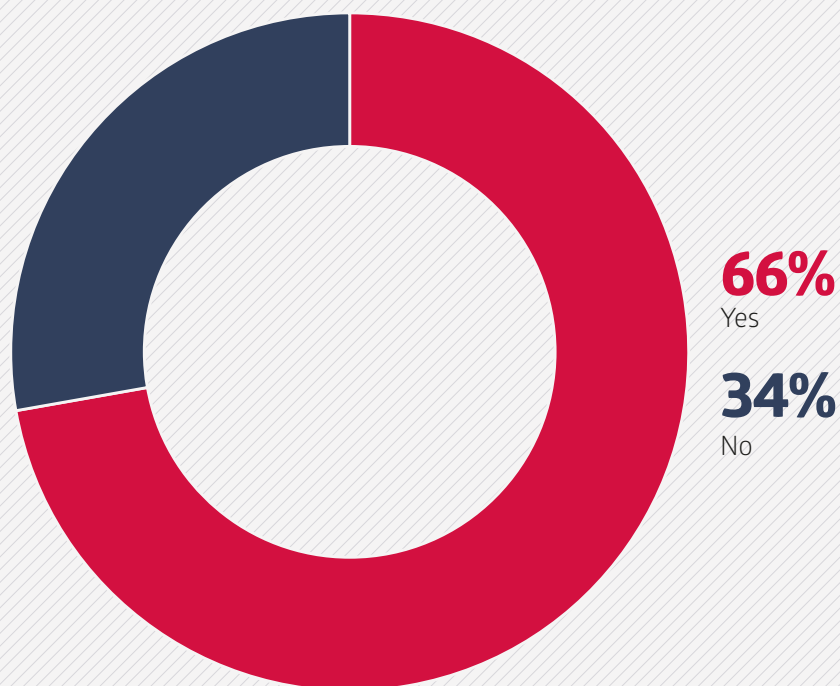
Businesses are not blind to the pain that traditional web conferencing solutions are creating. A high 66% of all web conferencing buyers – the individuals that are responsible for purchasing and selecting web conferencing tools for their businesses – signaled in this study that they are looking for a new tool.

If we look at the demand pattern in mid to large enterprises (over 500 employees), that figure jumps to 75%. As the organization scale increases, so does the cost of using old web conferencing tools, and hence the increased motivation to switch to a new solution.

FIGURE 18

66% of buyers are looking to acquire new web collaboration tools.

Are you looking to acquire a new web collaboration tool?



In search of a better experience

EXPERIENCE TRUMPS COST WHEN USERS CONTEMPLATE SWITCHING.

Throughout this research, we have seen the pain that old web conferencing tools engineered for outdated meeting styles is creating. For one-to-one and ad hoc meetings, users want simple tools that enable easy communication and collaboration.

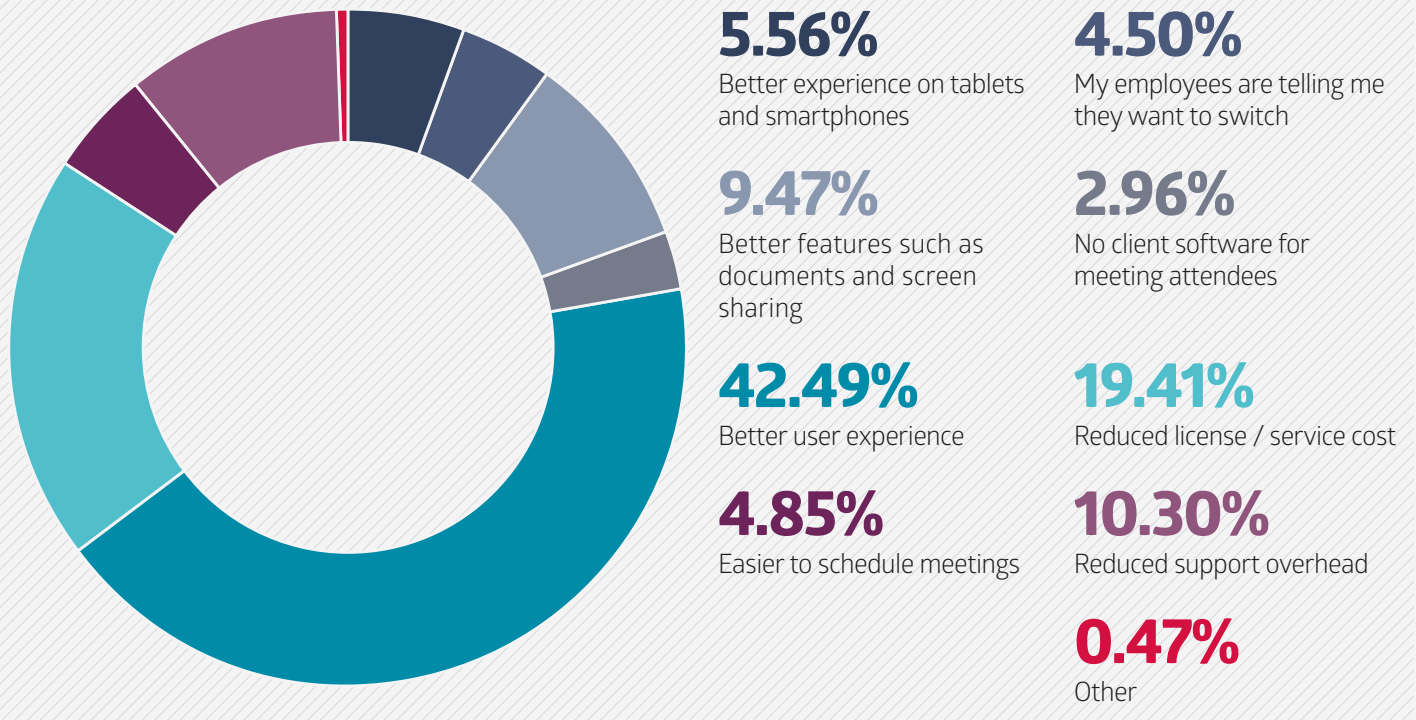
In fact, 42% of buyers highlighting user experience as a key benefit they are looking for in a new solution. Cost reduction is the second most important driver, but at 19%, only half as important as a better user experience.

A key reason for this is that users find traditional web conference tools hard to use. 1 in 4 employees are reporting that they find it hard or very hard to set up and schedule meetings with traditional web conference tools. This is a real challenge for workers wanting conferencing and collaboration tools for ad hoc meetings, where simplicity, speed, and ease of scheduling are the basic requirements.

The extent of the user experience challenge for traditional video conferencing is highlighted by the extent to which non-digital natives have difficulty using these tools. 2 in 5 of every employee aged 55 and over find it difficult or very difficult to use these tools.

FIGURE 19

Why are businesses are looking to acquire a new web collaboration tool?
A better user experience.



Our conclusion

IT'S TIME FOR A BETTER WAY TO MEET.

Businesses demand web conferencing solutions that are built for modern employees, and a new, more agile and connected workforce. Technology is driving the evolution of the global economy at an unprecedented speed, and as businesses and their workforces evolve with it, they demand web conferencing tools that can keep up.



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We hope this analysis will help you make informed and imaginative business decisions. If you have further requirements, Ovum's consulting team may be able to help you. For more information about Ovum's consulting capabilities, please contact us directly at consulting@ovum.com

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The Ovum logo consists of a solid red square with the word "ovum" in white, lowercase, sans-serif font positioned at the bottom of the square.

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