

RISE OF THE HUDDLE SPACE

A International Survey of Users, IT Professionals, and Facilities Managers

November
2018



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Introduction

A total of 1,005 international participants from medium-sized businesses and enterprises completed the survey on the use of smaller meeting spaces designed for 5 or fewer occupants, commonly termed 'huddle spaces.' The survey focused on huddle space user habits and technology needs, as well as needs for deploying and managing meeting space collaboration solutions. Participants included those that use, design, provide or manage huddle spaces. The survey was administered in the United States and the United Kingdom.

Executive Summary

This research finds that huddle spaces deliver tremendous value to businesses, with 9 out of 10 participants stating the adoption of open space environments is increasing the need for these huddle spaces.

Huddle spaces require a wide variety of technologies to enable users and the business, such as audio and video conferencing abilities, digital whiteboards and scheduling solutions. Users stated that ease of use, solution reliability, and similar technology in each huddle space is key to their productivity. But nearly 8 out of 10 users shared they were frustrated with meeting room technology recently. These problems generate support calls to IT on a weekly, if not daily, basis.

Technology professionals agree with users, stating that using the same technology in each meeting space would remove many of their top challenges today and would be faster to deploy and easier to manage. Yet today barely 1 in 10 technology professionals have full visibility into huddle space utilization. With the growing need for huddle spaces, companies need to consider solutions that are easy to use, easy to manage and similar across all huddles spaces to accelerate deployments, increase user productivity and minimize costs.

Key findings

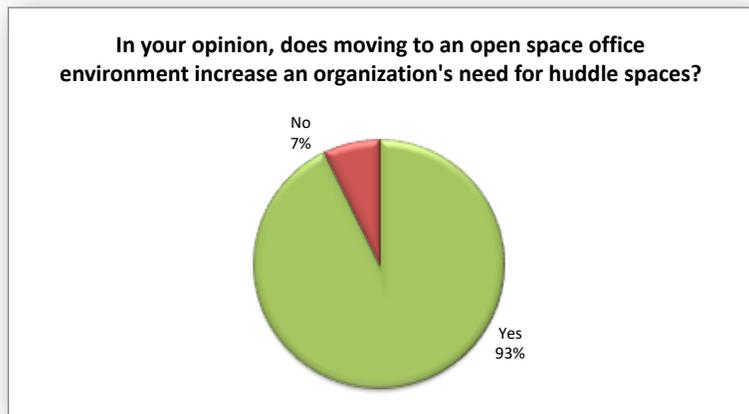
- **Growing Need for Huddle Spaces**
 - 93% state open office environments require more huddle spaces
- **Huddle Spaces Require the Right Technologies**
 - 65% indicate half or more of huddle spaces need video conferencing abilities
 - 61% report half or more of huddle spaces need a digital whiteboard
 - 83% reveal most huddle space meetings are scheduled
 - 90% state it is important that technology in huddle spaces is easy to use and familiar
- **Failing to Meet User Needs**
 - 78% have been frustrated with meeting technology in the last six months
 - Only 11% of IT pros have full visibility into huddle space utilization



Detailed Findings

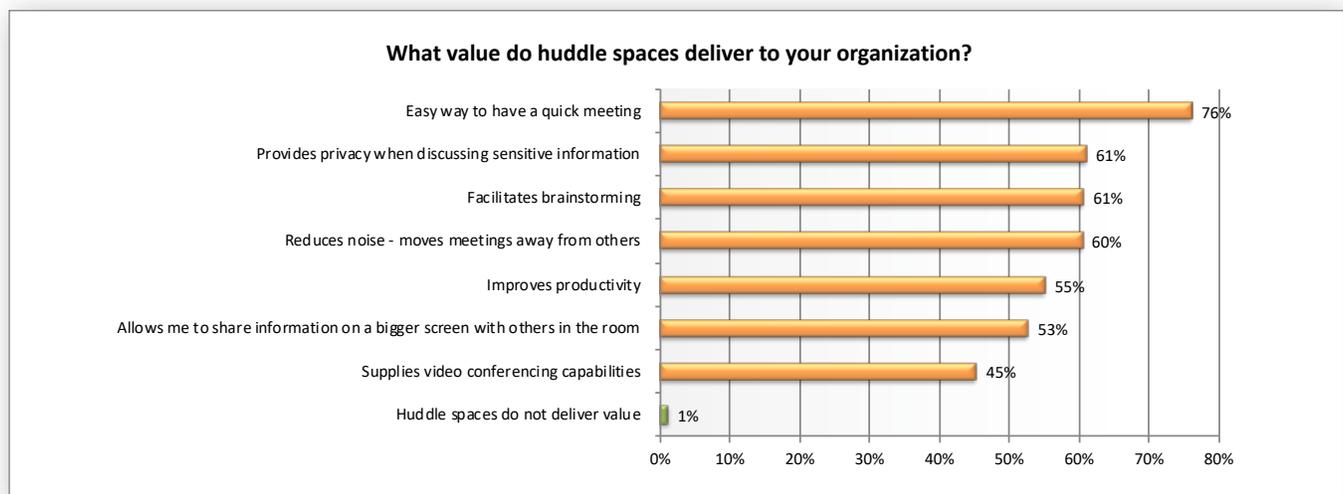
Open Office Environments Drive Need for Huddle Spaces

This research sought to quantify the current momentum for huddle spaces, defined as any meeting room or open area that is designed for up to 5 team members to work together. 93% of the users, facilities managers, and IT professionals state the current open office environment trend is driving increasing need for huddle spaces.



Huddle Spaces Deliver Business Value and Flexibility

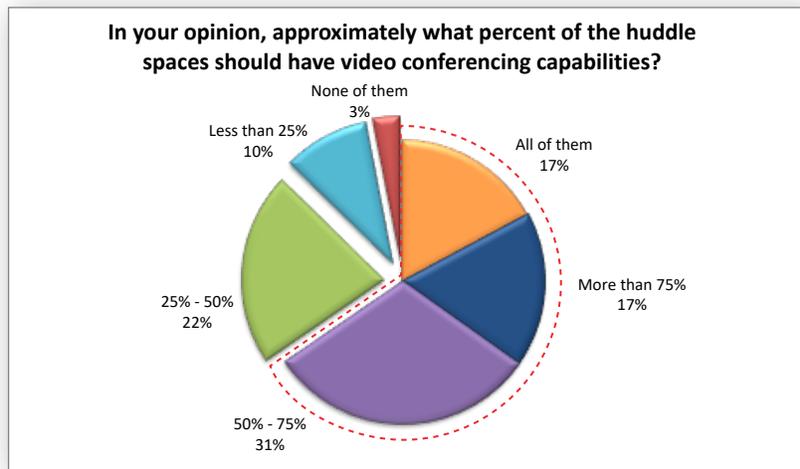
The research then focused on understanding the value huddle spaces are bringing to organizations. The top benefit was the ability to easily have a quick meeting (76%). Tied for the second most valuable attribute, at 61%, was providing privacy, especially for sensitive information, and also as a way to facilitate brainstorming. Just behind those at 60% was the courtesy to other colleagues of moving conversations and noise away from those working. A majority of participants also cited increased productivity (55%) and more effective information sharing (53%) as key benefits, closely followed by the core ability to have video conference capabilities (45%). Perhaps the most telling statistic was that only 1% of those surveyed stated a huddle space does not deliver specific value, thus indicating that 99% are receiving value from huddle spaces.





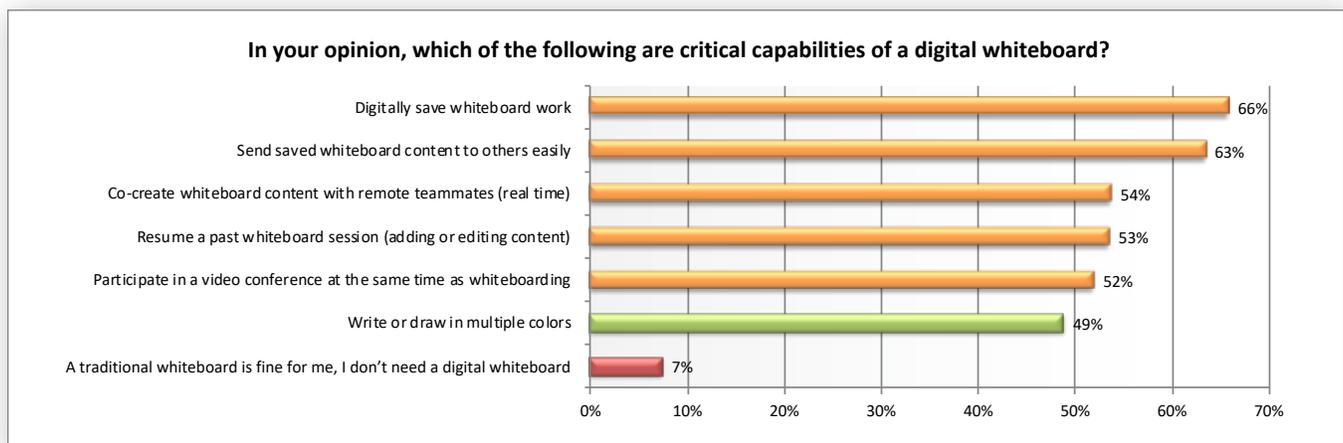
Huddle Spaces Require Video Conferencing Capabilities

The research then sought to determine what technology capabilities people require for their huddle spaces. 65% of those surveyed indicated that half or more of huddle spaces need video conferencing abilities. This finding also supports the trend that meetings now often include others that are not physically in the same location. Coupled with huddles space growth is the need for technology to facilitate geographically dispersed meeting participants.



Digital Whiteboards Wanted in Huddle Spaces

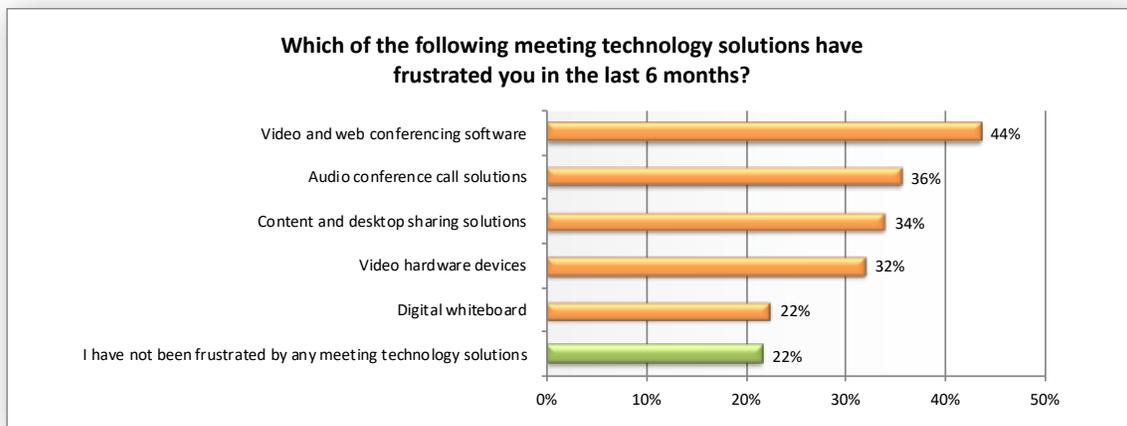
The survey then asked participants about the value of digital whiteboards - a physical white board where anything written on it is displayed to all remote meeting attendees' screens and which allows remote attendees to make notes and changes to their screen version which are then displayed on the physical white board. Only 7% of those surveyed indicated they preferred a traditional whiteboard, yielding 93% wanting digital whiteboards in their huddle spaces. Numerous benefits were cited in support of this technology such as the ability to easily save work written on digital whiteboards (66%), and easily send that work (63%) to others. The next three capabilities were nearly tied: the ability to create content collaboratively (54%), resume a previous whiteboarding session (53%), and participate in a video conference while whiteboarding (52%). This data reveals the value of enabling digital collaboration with team members located anywhere.





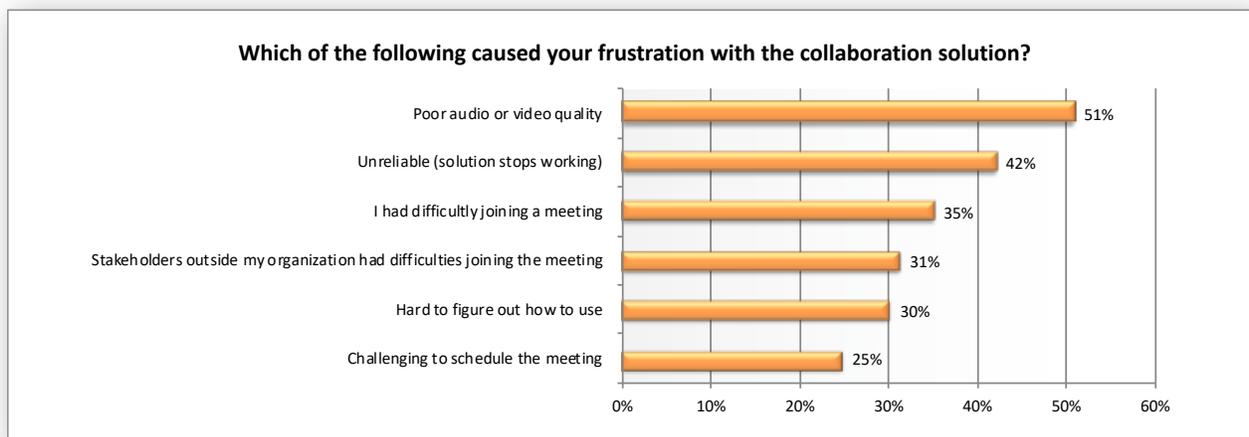
Users Frequently Frustrated by Meeting Space Technology

Much of the earlier findings are about the value huddle spaces and technology can deliver. However, the research sought to find out if collaboration technologies used in any meeting spaces are currently delivering seamless value. This research finds that only 22% of those surveyed had no frustrations in the last 6 months, leaving an appalling 78% of users who have been frustrated. The top frustrations are video and web conferencing issues (44%) and audio conferencing problems (36%), which are the basic staples of any meeting space today. Those were followed by desktop sharing (34%) and video hardware device (32%) challenges. These results indicate that the basic meeting spaces are failing users by making it difficult to connect with others.



Users Frustrated by Solution Unreliability, Ease of Use and Quality Issues

Given the preceding findings, the research sought to understare the exact nature of the difficulties that result in user frustrations. Leading that list is poor audio and video quality (51%) followed by undependable solutions that stop working (42%). The basic ability to join meetings or have others join meetings took the next two spots at 35% and 31% respectively. Nearly a third (30%) found the solutions confusing to use and a quarter (25%) stated it was challenging to schedule meetings. Many of these problems seem like basic capabilities that we all expect to work in today's technology.



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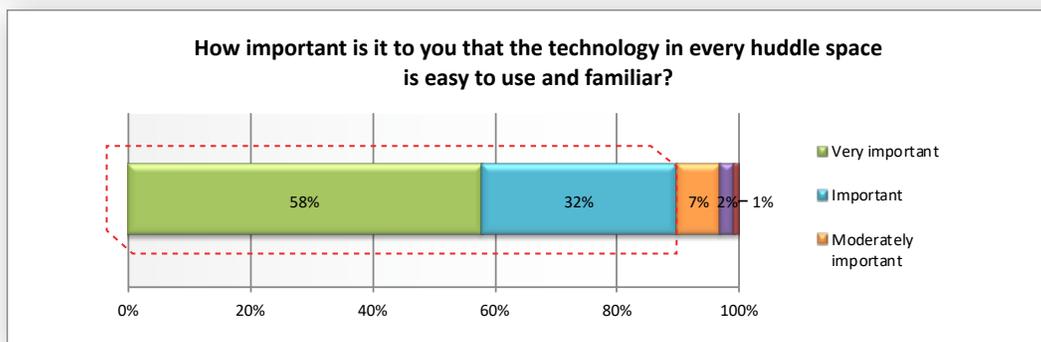
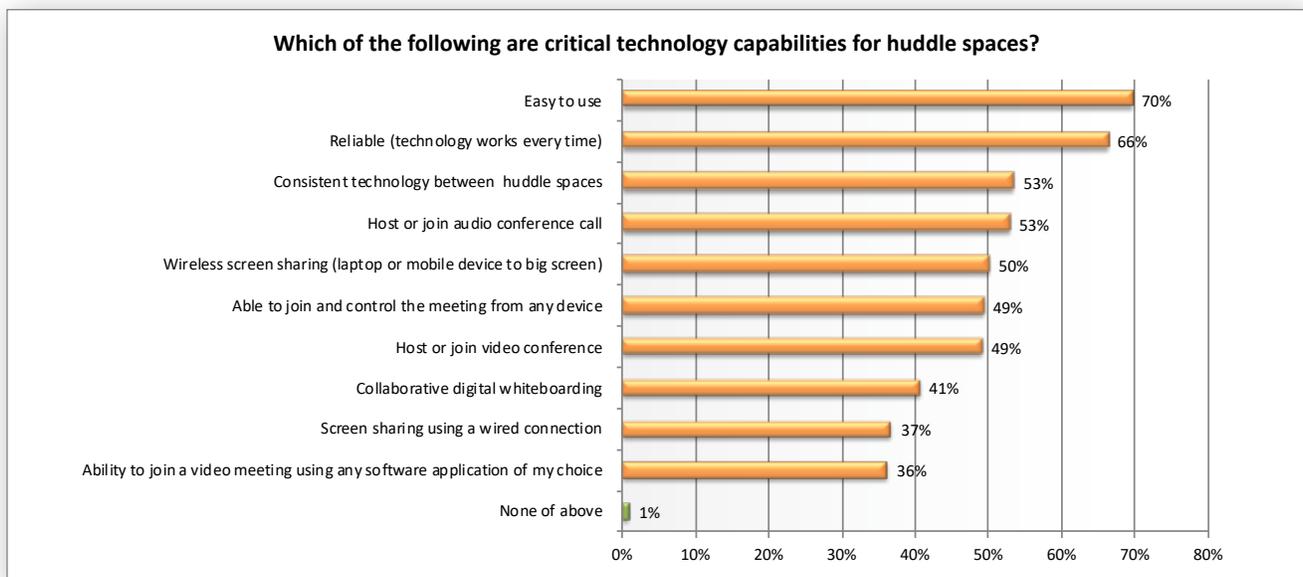
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Huddle Room Technology Must be Easy to Use, Reliable and Consistent

This research then focused on discovering what technology capabilities are necessary for a huddle space. The participants provided numerous requirements, but the top three were very telling. Ease of use led all responses (70%) followed closely by solution reliably (66%) and then consistent technology (53%) in all huddle spaces. Participants were asked just how crucial ease of use is, and 90% said it was important with 58% stating it was very important. This information reinforces preceding findings about user frustrations and challenges. Users want huddle space collaboration technology that is easy to use and just works. Just as importantly, they want the same technology in every room. People want to focus on the subject of the meeting, not the technology enabling it.



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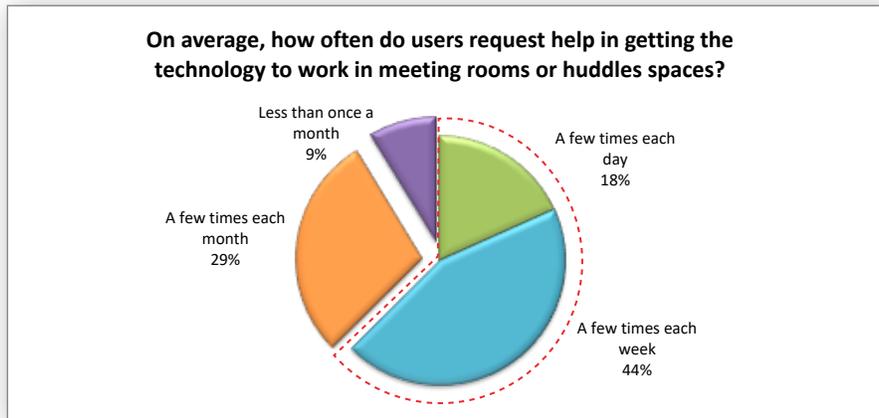
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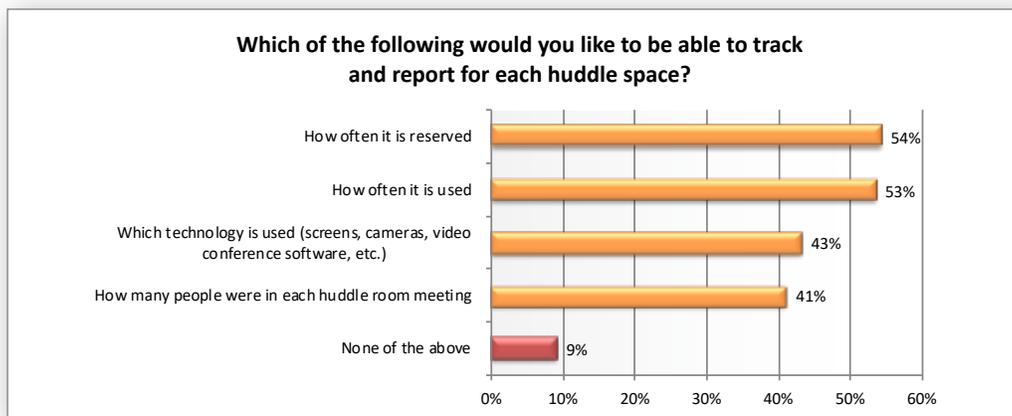
User Issues Drive Support Calls and Costs

Earlier in the report 78% of users shared their frustrations, indicating that requests for support are likely frequent. For IT professionals and facilities managers, we asked how often they are receiving support tickets or help requests for collaboration technology. 62% indicated they need to provide assistance from several times a week to several times each day to users. This data shows the frequency of challenges but also reveals the level of frustration for the user. Importantly, the findings also indicate a cost to the business as resources must be used to solve technical issues.



Very Few Have Full Visibility into Huddle Space Utilization

IT professionals and facilities managers generally want to proactively resolve issues before users experience them. To that end, they must have visibility into the use and performance of a solution. When these professionals were asked what metrics they would like to track for huddle spaces, four responses received 60% or more of the votes. Those responsible for managing, servicing, or installing huddle spaces want to know how often they are used (70%), which technology is being utilized (64%), how often the spaces are reserved (63%) and how many people are in each room (60%). The research then asked how many of those four key metrics they can monitor today. Surprisingly, only 11% indicated they can measure and track all 4 today, and only 20% said they could measure three out of the four. Clearly IT professionals and facilities managers lack visibility and hence are often operating in a reactive mode to respond to all the support needs as noted previously in this report. If the IT professionals and facilities managers had better visibility into use and performance metrics, they could optimize huddle space solutions for the needs of their users.

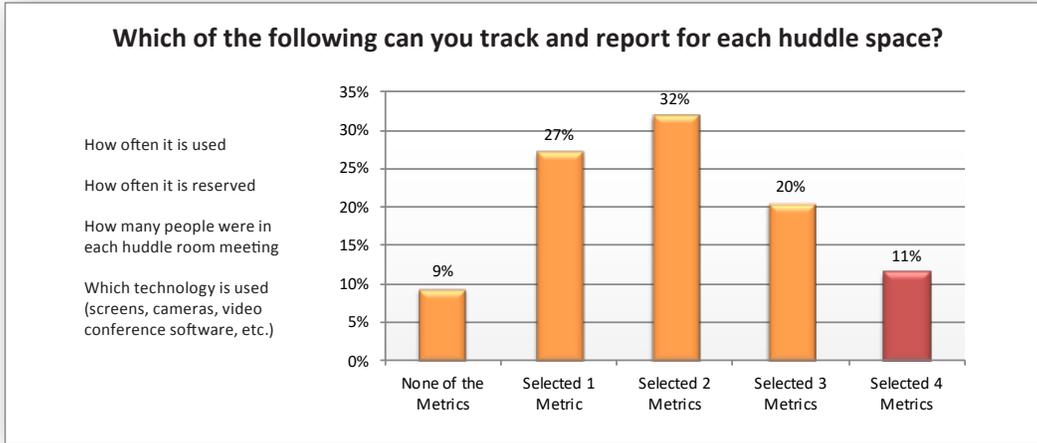


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Collaboration Technology Can Slow Meeting Space Availability

With the lack of visibility, and numerous issues users are facing, the research confirmed that managing collaboration solutions can be problematic. To make matters worse, when new meeting rooms are being built, more than half (54%) of them are delayed by collaboration technology. This indicates that collaboration solution deployment can be problematic, if the products being deployed are not simple or reliable.



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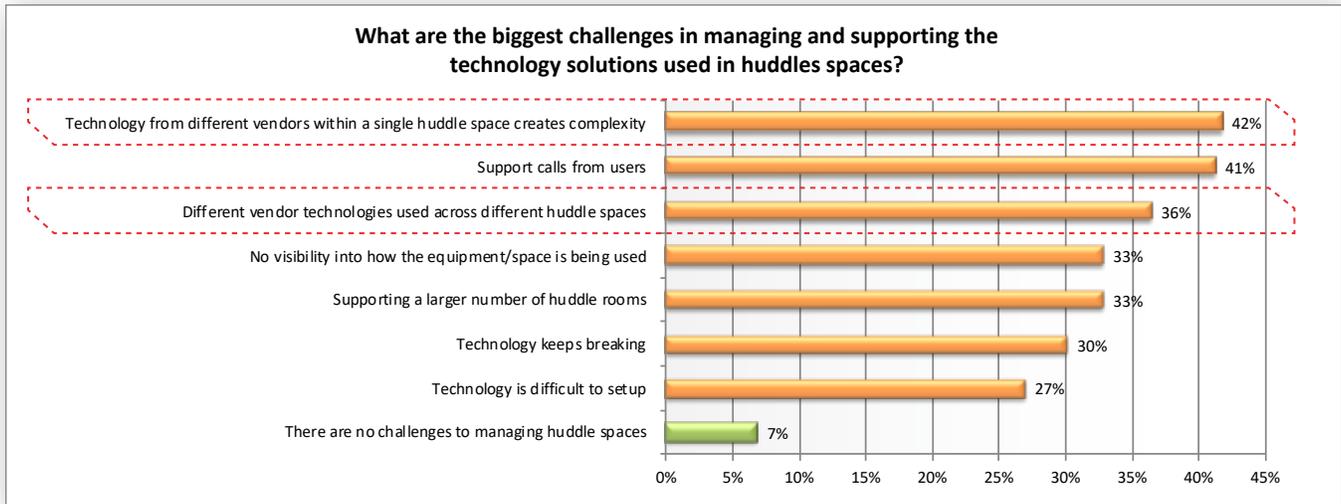
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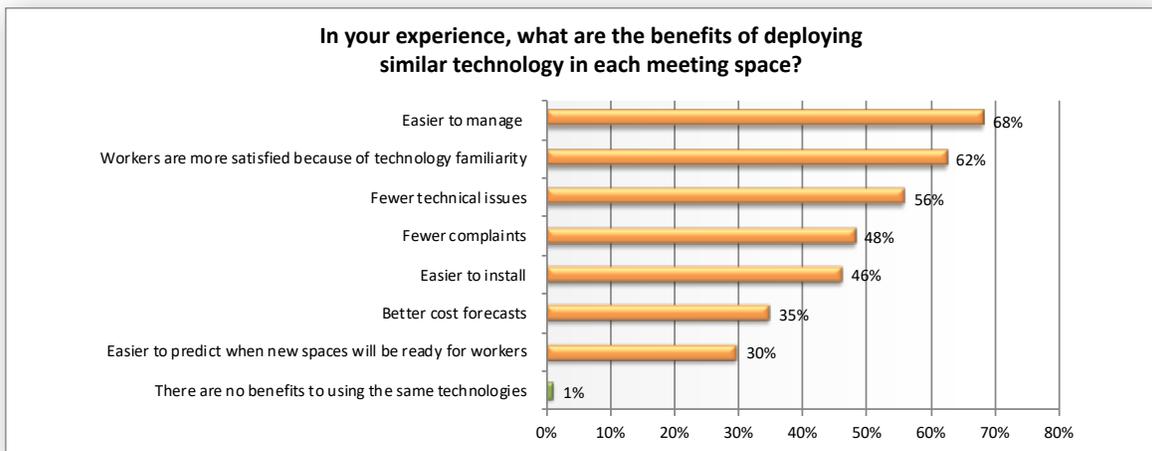
Technology from a Single Vendor Removes Top Huddle Space Challenges

The research drilled down further looking to understand what makes meeting space and collaboration technology so challenging to manage. Two of the top three answers focused the problems that arise from using different technology vendors within the same huddle space (42%) and using different technology across different huddle spaces (36%). This reinforces the finding that technology consistency and familiarity drive valuable benefits for huddles spaces and those managing them.



Utilizing the Same Technology in All Meeting Spaces Increases Productivity

Earlier the findings showed that users wanted the same technology in all their huddles spaces, but do those managing the spaces also see benefits to deploying similar technology? The research showed that, in fact, they do. 99% of technology professionals stated there are benefits to deploying similar technologies in meeting spaces. Leading the advantages is that similar meeting technology is “easier to manage” (68%). Secondly, they report that a benefit of similar technology is that users are more satisfied with the meeting technology when it is familiar (62%), revealing that IT and facilities are focused on end user satisfaction. Fewer technical issues (56%) and easier to install (48%) round out the top four spots. Other results show that using the same technology provides better predictability of costs (35%) and space readiness (30%). Thus, deploying the same technology delivers significant value to the business in numerous ways.



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Conclusion

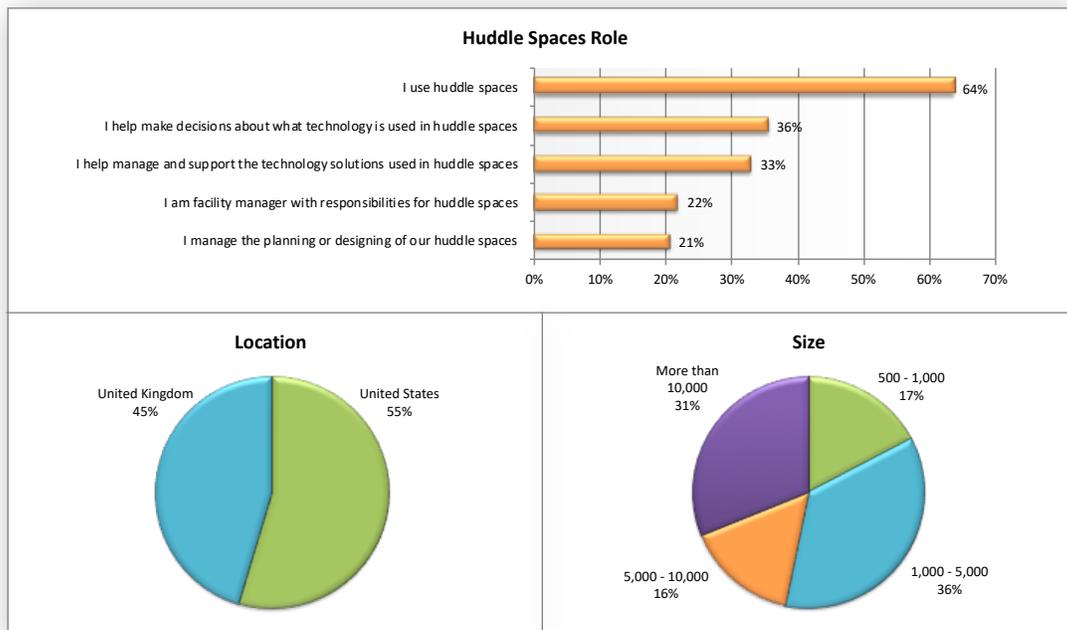
The need and use of huddle spaces is growing and is expected to accelerate, especially in open office environments. The reason is simple: huddles spaces deliver significant value to users and to the business. In today's digitally connected world it is just a matter of normal business that meetings have participants from around the globe. Most companies require collaboration technology in order to communicate and get work done.

Huddles spaces, while smaller than larger meeting rooms, need the same level of technology. Users want audio and video capabilities as well as digital whiteboards to have more productive meetings with users in various geographic locations. Huddle space technology needs to work, it needs to be easy to use, and it must be consistent from one space to another. This allows users to derive maximum productivity and not waste time and resources asking for technology support. Consistent technology in all meeting spaces delivers value to the business by reducing the time it takes to deploy new meeting spaces, making rooms easier and simpler to manage, and directly mitigating the top challenges IT professionals and facilities managers are facing today.

As companies are looking to vendors that can provide meeting and huddle space solution technology, they also need to look at capabilities that provide visibility into meeting space utilization. This provides key data for IT professionals to be proactive and ensure meeting spaces are ready for users and working properly. That same data also informs facilities and real estate roles about whether the rooms they have are delivering value, optimal for meeting sizes, or if more meeting spaces are needed. Meetings are an everyday occurrence for most, and those in the meeting need to focus on the subject of the meeting to drive value for the business, not be distracted by meeting room technology. Meeting room technology needs to simply work, every time.

Survey Methodology

A total of 1,005 participants that were users, IT professionals or have facilities responsibilities completed the survey. Participants were from the United States and the United Kingdom. The survey was administered electronically, and participants were offered a token compensation for their participation.



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