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Outlook for the post-covid workplace:

hybrid, employee-centric, engaged

Meeting Barometer drops as people
struggle with virtual collaboration,
on the impending return to the office



Foreword

2020 brought us the biggest shift ever in working culture and technology. After a strange year in our careers, a year of home office, days filled with virtual meetings and remote chats with co-workers, we are ready to return to the workplace.

Thanks to the vaccine rollouts worldwide, employers and employees are becoming more confident about a back to office scenario.

As the workplace continues to evolve and shift between remote, in-office and hybrid work models, companies start to prepare their office spaces for a well-balanced return to the office. In this research we wanted to explore how business leaders can welcome workers back in a safe, inspiring and productive workplace. A renewed workplace, that will embrace hybrid and blended work models and that will be substantially different from what we knew pre-covid.

How and when can we expect to get back to the office? Can we boost meetings again and get away from the overload. What drives the employee to return to the office? Is it the type of meeting they are hosting or the better access to technology present in offices? What are the investment priorities when it comes to enabling better (hybrid) collaboration and videocalls from the office?

In short, what are the trending topics in work and meeting that business leaders can simply not ignore? Since employee expectations have changed significantly and people are craving for a flexible and autonomous working life, enterprises will clearly benefit when putting the employee at the heart of collaboration. Employee engagement is the new productivity, as you will discover.

The 5 key work trends that are constantly evolving in the new era of work:

- Growing office optimism
- Meeting Barometer takes a plunge as people struggle with virtual and hybrid
- The search for more engagement is driving us away from virtual
- The laptop is our interface to the world
- The employee-centric workplace

TREND 1

Growing office optimism



56%
are eager
to return to the office



72%
will be back in the office
one days or more
by end of June 2021



We want to work **more**
from the office
than 6 months ago
(3 days in 2020 - 3,5 days in 2021)

A year ago, the general feelings towards office-work had taken a quite a turn. During global lockdowns, people were bound to the home office and some even claimed that working in an office building would become a thing of the past.

Employees were enjoying the benefits of working from home so much in the early months of the pandemic that many employers, including BP² and HSBC³, were contemplating to drastically reduce or reconfigure their office spaces by shifting parts of the workforce towards remote work and flexible workplaces.

But a couple of months into the pandemic our 2020 Meeting Trend Research showed that the downsides were starting to outweigh the benefits for many workers. Zoom fatigue, balancing between office and domestic tasks, home schooling children and missing the social face-to-face interactions started to take a toll on all of us. And now, one year after this manifest workplace disruption, the market is showing the first signs of a slow but, actual return to the office. Top-tier US bank JPMorgan⁴ encourages its employees to take the necessary arrangements for a return to their offices by July 2021, since CEO Jamie Dimon clearly prefers in-office to virtual work: "Most professionals learn their job through an apprenticeship model, which is almost impossible to replicate in the Zoom world. Over time, this drawback could dramatically undermine our company's character and culture."

Surprisingly, it is not only C-level management requesting employees to return to the office, but employees themselves are signaling that they are eager to return. In fact, 50% of the workforce already comes into the office

on occasion. Australia and France appear to be at the forefront of this trend, with respectively 82% and 61% of employees, having already (partially) returned. Predictions are that another 22% of employees will be able to visit the office by the end of June. This means that by then, 72% of the workforce will be back in the office (one or more days a week).

This might give the impression that employees are ready to give up the flexible way of working that they got used to since lockdown periods. The opposite is true. Employees want to be free to choose whether they work from home or from the office. Although 78% prefer to work at least one day a week in the office, 90% want to be able to work from home as well. The ideal workweek balance has shifted in favor of the office. In September 2020, people were still more optimistic about working from home and employees indicated that the ideal workweek would be 2 days at home and 3 days at the office. Today, the desire to work from home has dropped to 1,5 days a week, with employees preferring to spend more time, 3,5 days per week, at the office.

TREND 1

Growing office optimism



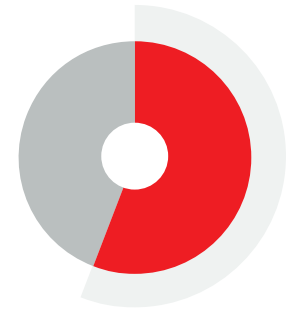
66%

say their CEO wants them to return to the office



42%

feel pressured by their manager to return to the office

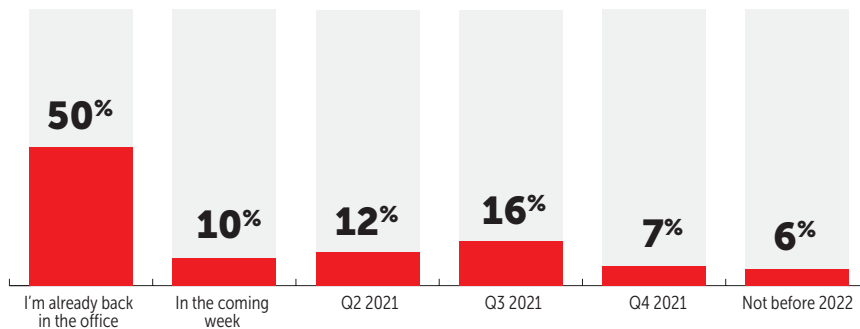


56%

wants to get back to the office now

Timing of return to the office

% selecting timing



Preferred balance home versus office



3 days

in the office in 2020



3,5 days

in the office in 2021



2 days

home office in 2020

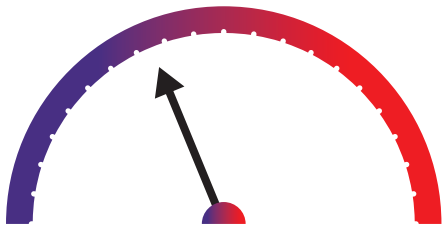


1,5 days

home office in 2021

TREND 2

People are struggling with virtual



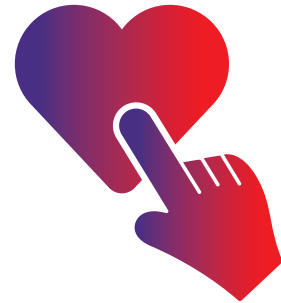
Barco Meeting Barometer drops to

-25



49%

admit that remote collaboration does not come naturally to them



80%

believe easy-to-use tech can make meeting better

The Barco Meeting Barometer has dropped significantly after one year of COVID. In September 2020, employees were still carefully positive about meetings, resulting in an index of +17. Now, the score has descended to -25, uncovering a growing frustration with virtual meetings in general.

In the 2020 Meeting Trends research, 49% of respondents admitted that remote collaboration does not come naturally to them. What's new is that not only purely remote meetings evoke negative feelings, the quality of hybrid meetings also seems to be under pressure.

Is that surprising? Not really, since a year ago, the entire workforce switched to remote work almost overnight. Since then only 1 in 2 employees has received proper training to enable remote work. McKinsey research⁵ even discovered that only 32% of all employers have communicated their strategy on post-pandemic work. This is leading to anxiety, uncertainty and, in turn, reduced productivity of the workforce.

Employees gradually got used to working remote, often by trial and error. Returning to the office now requires shifting that carefully found balance once again: learning how to collaborate in a hybrid team that includes remote as well as in-office team members. Research by Kinly confirms⁶ that the office will have to be adapted to suit the activities that employees actually want to perform there. The majority of hybrid collaboration will actually take place inside the meeting room. 57% of employees believe the meeting room will become the most frequently used office space. But there's a catch: meeting rooms are not accurately equipped for hybrid work. 65% of employees struggle with different set-ups in meeting rooms, especially when moving from one meeting room to the next. 48% have trouble to connect to the AV peripherals like display, camera, speakers and mic, not knowing which cable is the right one.

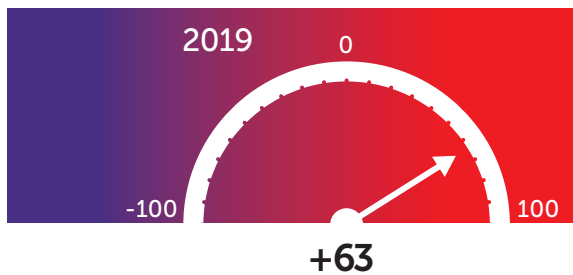
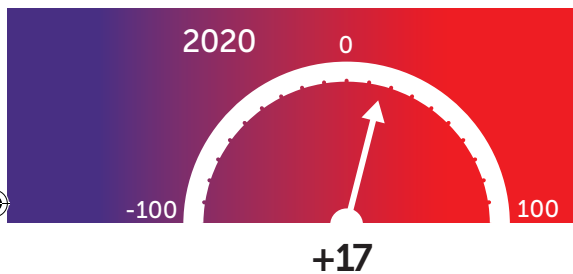
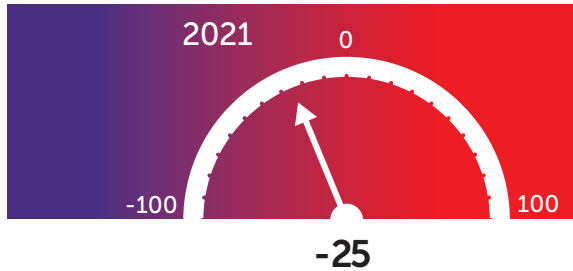
One thing's for sure: we are returning to the meeting room. In the future, we'll see more hybrid and less virtual meetings. Another change in mindset and meeting culture that starts with the right tech. 4 out of 5 believe that simple, easy-to-use technology can eliminate frictions with meeting room set-ups and can restore confidence in meetings. Employees just want to walk into a meeting room, connect automatically to the tech available, and start working and collaborating in an instant.

TREND 2

People are struggling with virtual

Meeting Barometer

Meeting comparison with 2019 and 2020. People believe meeting have improved or not



Meeting tech challenges

57%

think it is a hassle connecting the cable of the meeting room display



26%

find it easy to connect to the meeting room speakers and cameras



64%

agree it is challenging to move between meeting rooms where the set up is different



56%

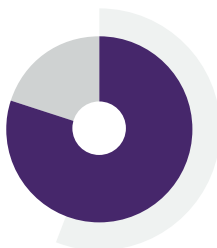
don't know what cable to pick when multiple cables are present in the meeting room



Importance of usability

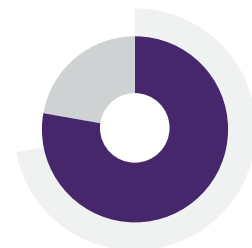
80%

believe easy-to-use technology can make meetings better



78%

wish they could simply walk in the meeting room and join the call without having to connect cables



TREND 3

The search for more engagement is driving us away from virtual

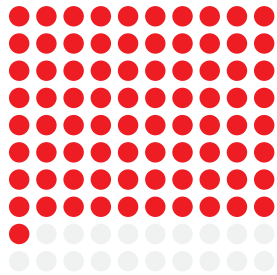
48%

give low engagement from meeting participants as number 1 reason that meetings get worse



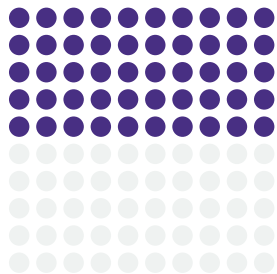
81%

of all meetings will be face-to-face or hybrid in the future



1 in 2

travel to the office when having to host a meeting



In 2020, our research already showed that low engagement was the primary cause for meetings getting worse. Microsoft's Annual Work Trend Index Report⁷ says: "While some of the isolation will ease as the pandemic subsides, the likelihood of ongoing remote work means that feeling included and engaged at work will continue to be a challenge — especially for those new to the workforce."

It's precisely this need for engagement and connection that makes employees want to get back into the office and reduce the number of virtual and remote meetings they attend daily. Our latest research shows that the return to the office is driven by three essential reasons: the wish for social interaction, higher productivity on the work floor and more efficient meetings thanks to the available technology.

We discover a rise in the number of meetings held in the office. Due to the pandemic, the number of in-person meetings went down from 47% in 2019 to 25% in 2020. Employees anticipate however that once the pandemic is under control, in-office meetings will return stronger than ever with 81% of all meetings being hybrid. In fact, meetings are the biggest reason for coming into the office, even today. When hosting a meeting, half of employees take a trip to the office to host calls in a more professional setting, with less distractions and access to better tech.

In addition, the need for social interaction is also driving the revival of the in-office meeting. We looked into meeting preferences (in-person, hybrid or virtual) and found that this preference depends on factors such as meeting purpose, number of participants and meeting type.

- Meeting purpose: When the goal of a meeting is to build or maintain a relationship or to discuss personal issues, employees clearly prefer an in-person meeting. For this reason, 59% prefer to have a one-on-one in person. However, when information sharing is the main goal, employees go for a virtual or hybrid meeting. That's exactly why Google CEO Sundar Pichai⁸ offers his workers a hybrid work model: "We firmly believe that in-person, being together, having a sense of community is super important when you have to solve hard problems and create something new so we don't see that changing."
- Number of participants: Employees favor face-to-face meetings when there are less than 5 participants. When more than 10 people attend, virtual and hybrid meetings are clearly preferred.
- Meeting type: The more engaged and interactive the meeting type (such as trainings or project kickoffs), the more people decide to meet in person.

In short, people want to return to the office for specific types of meetings and clearly defined meeting goals. When higher engagement and involvement are expected from the meeting participant, people prefer a face-to-face meeting. And with the growing need for employees to restore the connection with both colleagues and the organization, the return to the office is set in motion.

TREND 3

The search for more engagement is driving us away from virtual

Reasons to return to the office

% selecting each factor



51%

Being able to socialize with my colleagues



39%

Higher productivity when working from the office



38%

More efficient meetings

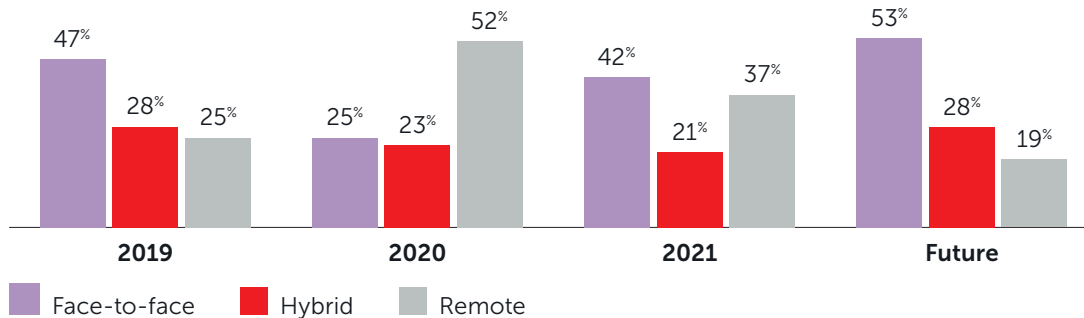


34%

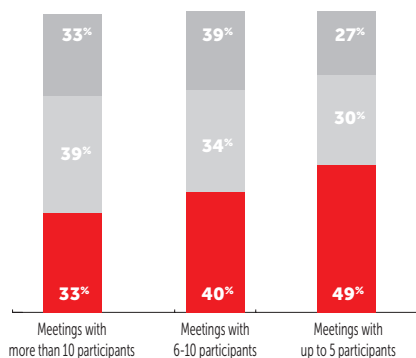
Getting access to better technology

Split face-to-face, hybrid and remote meetings

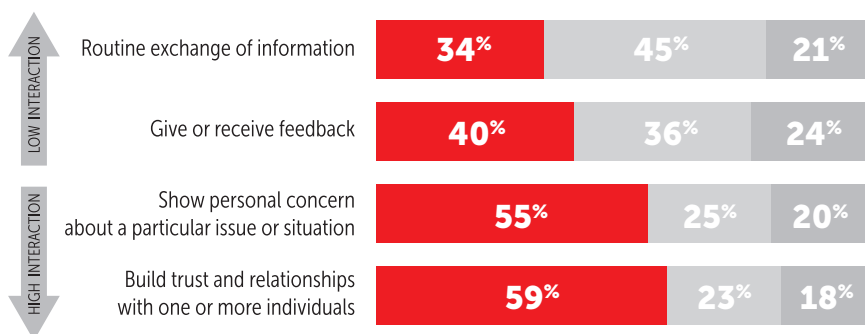
% of meetings



Meeting preference per #participants



Meeting preference per activity



TREND 4

The laptop is the interface to the world



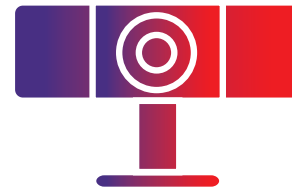
70%

prefer BYOM
(versus 56% in 2020)



78%

wish they could walk into the meeting
room, connect and start working



77%

think all meeting rooms need to be
equipped with VC technology

2020 was without a doubt the year of the laptop. During lockdown, our laptop was what connected us to the rest of the world. We used it as a work tool, to collaborate with colleagues or take classes, but also for leisure: watching Netflix and staying in touch with friends & family. White-collar workers in particular became glued to their laptops from dusk till dawn.

According to the Microsoft 2021 Work Trend Index Report, the time spent in Microsoft Teams more than doubled and the number of people working on shared documents increased with 66%. Zoom was downloaded over 485 million times in 2020, an increase of 30 times in comparison to the 16 million downloads in 2019.

The laptop will remain just as essential in meetings when we return to the office. Traditional in-room meeting tech no longer fits employees' needs. Instead, workers embrace the Bring Your Own Meeting (BYOM) trend, hosting calls from their laptop just like they're used to. The popularity of BYOM has increased significantly from 56% in 2020 to 70% in 2021. It's all about ease-of-use: stepping into a meeting room, employees want to connect automatically to the meeting room tech from their own device and collaborate without wasting time. The laptop – not the room tech – is the heart of the meeting room eco-system.

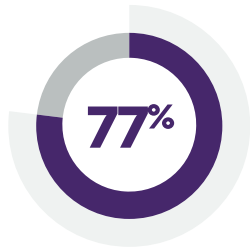
As a result, employers need to rethink the workplace to cater for these technology requirements. As previously mentioned, 57% agree the meeting room will become the most used office space. This means offices will need redesign to free up enough space for (hybrid) meetings. The good news is that 63% are satisfied with the current number of meeting rooms, they just need to be adequately equipped for hybrid work.

This also translates into the top investment priorities according to employees. Companies invested massively in UC&C licenses at the start of the pandemic to enable virtual collaboration. As a result, only 22% of the workforce believe this is still an investment priority for 2021. Right now, with the impending return to the office, employees shift the investment focus to the available technology in the meeting room. Currently only 1 in 2 meeting rooms is equipped for video conferencing, while a staggering 77% believe every single meeting room should enable hybrid meetings with VC technology. It's clear that business leaders should really make headway here, as 2 out of 3 of employees see VC tech (cameras, speakers, mics) as the no. 1 investment priority.

At the same time, enabling hybrid meetings (with licenses, collaborative solutions & meeting room peripherals) should go hand in hand with an easy user experience. Employees want wireless and touchless solutions, as those are also at the top of the investment priorities list. Usability is clearly key, and companies should always keep that in mind when investing in new tech.

TREND 4

The laptop is the interface to the world



think all meeting rooms should be equipped for video conferencing



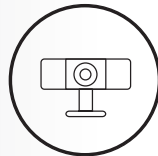
say the meeting room will be the most used space in the post-covid workplace



just want to walk into the meeting room, connect and start working

Investment priorities (according to employees)

% selecting priority



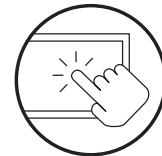
51%

Video-conferencing equipment



43%

Wireless meeting room technology



36%

Touch screen for presentations



32%

Running meetings with the laptop as command center



30%

Touchless meeting room technology (e.g. voice-controlled ...)

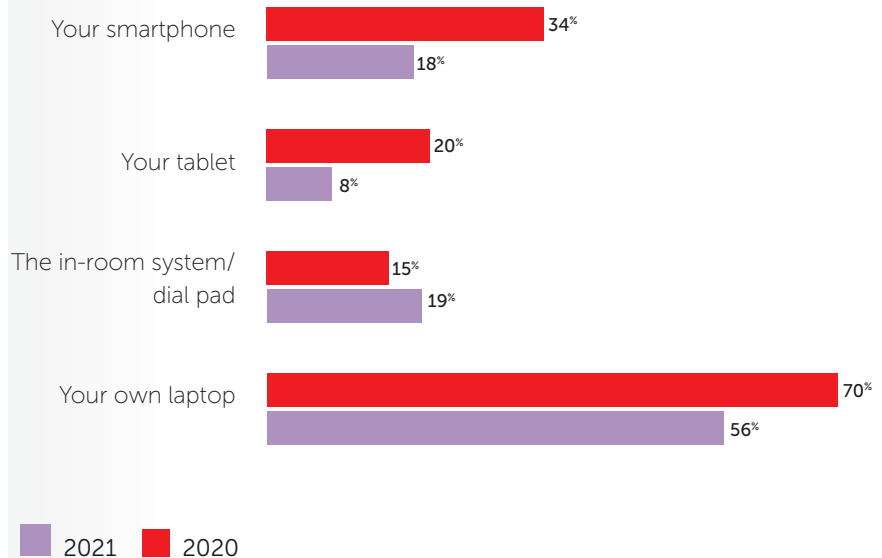


22%

Video conferencing licenses

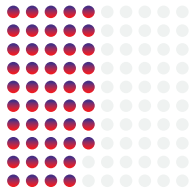
Preferred device to host video calls

% selecting the device



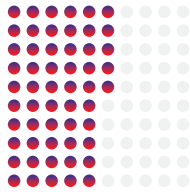
TREND 5

The employee-centric workplace



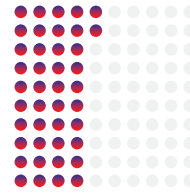
48%

find it difficult to connect
to the meeting room



65%

struggle with trying to figure
our different set-ups
when moving between rooms



42%

agree that their employer
did not prioritize the investments
requested by them

While companies are rethinking the workplace, employees are doing the exact same. A year ago, their lives were suddenly turned upside down. No more commute or social obligations, and basically a lot of time to reflect on their personal and professional life. Workers were re-evaluating what they want and pondering on questions.

Am I still happy in my job? Do I want to re-enter the rat race? What are my ideal office hours? And where do I want to work?" Burnouts and bore outs were not eliminated by quarantines.

And it doesn't stop at questions, many are also taking actions. According to Microsoft², 41% of workers intend to leave their current employer within the next year. Employees are raising the bar and expect more from their employers. They want flexibility, ideally working from home 1,5 days a week and in the office 3,5 days a week whenever they prefer. Moreover, employees don't want to be told which tools to use to host meetings. They want the freedom to use their own preferred tool and usually that's their laptop. And they prefer a hybrid way of working, easily shifting between in-office and remote for a particular type of task or meeting.

This means that each employee enters the workplace with a set of expectations. What those are exactly, varies from one employee to the next. This Barco Meeting Trend Research reveals that there are strong differences across generations, gender, department and seniority level. People in IT, for example, want to work from home twice as much as those in the operations. Generation Z youngsters at the start of their career prefer to work more from the office than senior management. Baby boomers show a strong preference for face-to-face meetings and hosting a call from their laptop, whereas millennials prefer a hybrid way of working and are open to

use both their laptop and smartphone to host meetings.

In short, leaders must step away from the one-size-fits-all approach and should invest in flexible tools that will meet the expectations of all employees. While almost 3 out of 4 agree that their company has made certain investments to enable the post-COVID way of working, over 40% believe that the company has not prioritized the right investments needed for better hybrid collaboration.

Rethinking the current work-centric workplace and shift towards a more employee-centric workplace seems the obvious next step towards business success. Workers' expectations and requests should be considered when equipping the workplace to create a dynamic environment for each and every one of them. In this way, companies will not only be able to attract the best talent and create a flexible work culture, but it will also result in a more engaged and thus productive workforce. Leesman's Workplace 2021 report¹⁰ confirms: "The best workplaces are carefully crafted ecosystems tuned to the needs of their users. These brilliant workplaces will draw willing employees back. Sub-optimal spaces will act to disenfranchise employees who built better at home."

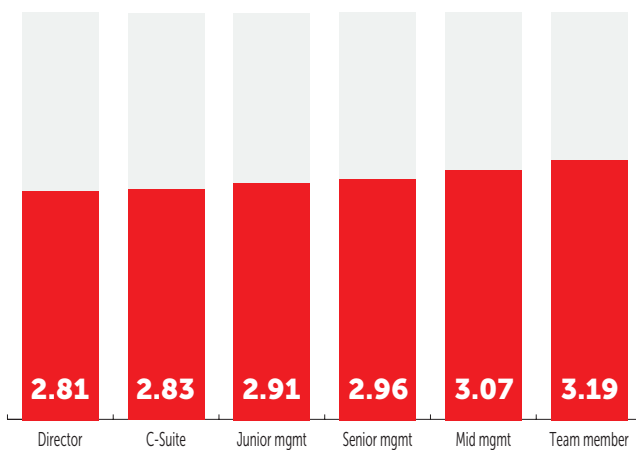
TREND 5

The employee-centric workplace

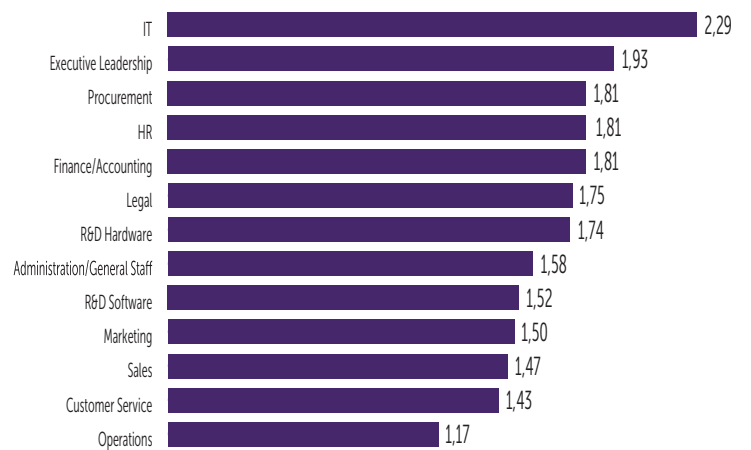
The workforce demands flexibility



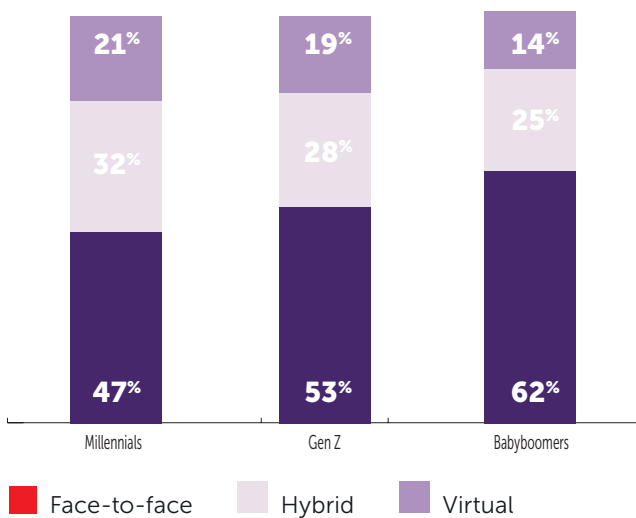
Average #days wishing to work from office



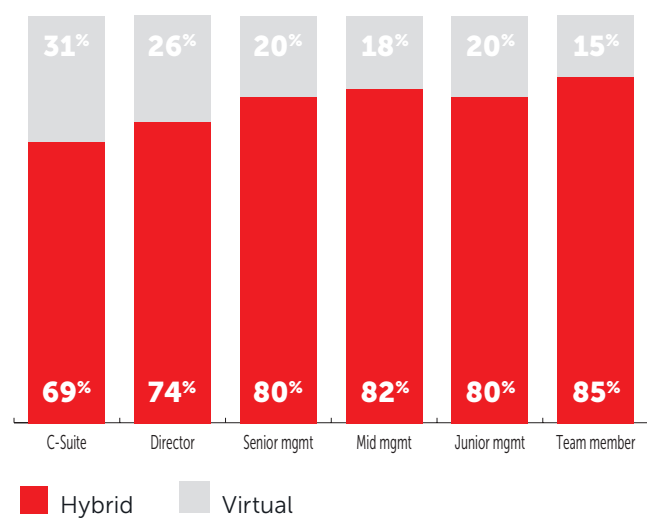
Preferred #days working from home



Preference for face-to-face, virtual or hybrid meetings



Meeting type preference



Looking ahead

With the majority of companies working on back to office scenarios, a few significant shifts have taken place in the world of work. The 5 key trends in our hybrid, worker-centric work model will no doubt inspire companies to redesign the office into a flexible, safe work environment.

In short, we talked about growing office optimism, people struggling with an overload of virtual at home, the search for more engagement driving people away from virtual, the laptop being the interface to the world and the future, people-centric workplace.

Today, it's still unclear how and what the hybrid workplace will look like exactly. Fact is that we will not just go back to our old-ways and that we will not stick around in our present-day, virtual habits either. We're creating a new, ever-evolving hybrid work model as we move forward. Carefully balancing between employee needs, business goals and safety measures, we look for ways to bridge the gap between between in-office and remote workers and allow for productive collaboration. And while we're shaping the workplace of the future, we gladly give business leaders these 3 basic fundamentals.

Time to reconnect

Employees have spent the majority of last year working remote, often feeling disconnected from co-workers and company. People are eager to return to the office in search of social interaction, increased productivity, and more efficient meetings. It's time for them to reconnect with both the organization and colleagues. Especially since these are important factors for a company's employee engagement and retention, there's no time left to postpone decisions. 71% of employees think their employer should start preparing now. Getting ahead and designing the hybrid workplace started yesterday...

One size does not fit all

Employees expect the freedom to work in their own way. And there are many differences across generations, gender, department, and seniority level. Every individual enters the workplace with a large variety of expectations. Companies need to develop workplace strategies that allow for this kind of flexibility and empower employees to work the way they want.

Bring your own meeting

We've said it before: the laptop – not the room tech – is the heart of the meeting room eco-system. Employees prefer to host meetings from their own laptop (BYOM), and they want to work with wireless & touchless meeting room tech that allows that.

Connection, collaboration, and meeting engagement have set the move to hybrid in motion. It's time to jump on that train and get your employees to start commuting again. The new, hybrid office will welcome them with open arms (and the right tech!).

Sources

² <https://www.theguardian.com/business/2020/aug/12/bp-mulls-radical-reduction-of-office-space-in-move-to-flexible-working>

³ <https://www.bloomberg.com/news/articles/2021-04-27/hsbc-to-cut-office-space-by-20-in-2021-halves-business-travel>

⁴ <https://www.forbes.com/sites/jackkelly/2021/04/28/jp-morgan-requires-employees-to-return-to-their-offices-by-july-striking-a-blow-to-the-remote-work-trend/?sh=335f8be74cdc>

⁵ <https://www.mckinsey.com/featured-insights/future-of-work/the-future-of-work-after-covid-19>

⁶ https://www.kinly.com/img/Kinly_e-book_Work_is_an_activity_UK_Eng.pdf

⁷ https://ms-worklab.azureedge.net/files/reports/hybridWork/pdf/2021_Microsoft_WTI_Report_March.pdf

⁸ <https://www.forbes.com/sites/jackkelly/2021/04/01/google-wants-workers-to-return-to-the-office-ahead-of-schedule-this-looks-like-a-blow-to-the-remote-work-trend/?sh=4b1b083f1575>

⁹ https://ms-worklab.azureedge.net/files/reports/hybridWork/pdf/2021_Microsoft_WTI_Report_March.pdf

¹⁰ <https://www.leesmanindex.com/workplace-2021-appraising-future-readiness-launch/>

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About the study

Barco is one of the leading companies in workplace collaboration tools and strongly believes in the power of research to drive innovation in the field. For this study, an online survey was conducted by market research and advisory company Savanta with 784 white collar workers from different industries, seniority levels and company sizes. The sample consists of employee from 7 countries worldwide: the UK, US, India, Singapore, Australia, France and Germany, as to give a global overview of the workplace trends.

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ENABLING BRIGHT OUTCOMES

BARCO