



## RoperASW and TANDBERG International Survey Results Overview November 2003

### Overview

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In order to better understand the state of communication in business today, TANDBERG and RoperASW teamed up to conduct a survey of business professionals to measure behaviors and attitudes around specific communication methods used in the workplace. The goal of the survey was to compare the efficacy of face-to-face, audio, and electronic communication in accomplishing various business objectives and to better understand how video communication might fit into the current mix.

### Methodology

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RoperASW fielded the online study among a sample of approximately 625 business professionals across five countries including US, UK, Norway, Germany and Hong Kong. The study was given to people in white collar or executive and professional jobs that work in offices. Respondents were screened to make sure that they conduct at least some business with people who work outside their office.

The survey consisted of 19 questions that were administered electronically and designed to measure attitudes and behaviors in regards to various communication mediums.

### Summary of Findings

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Overall, the findings of this survey strongly demonstrate that business professionals believe that face-to-face communications is the superior way of interacting with people for most business objectives. Yet despite this belief, much of business communication often takes place in a non-visual manner.

This survey underlines how valuable interacting with someone face-to-face is to the productivity and success of business (as opposed to by audio or electronically).

- Reliance on approaches other than face-to-face communication can lead to:
  - Confusing discussions which hinders faster, smarter decisions (only 3% said audio conferences are best at reducing confusion or misunderstanding, while 81% said face-to-face communication is best at reducing confusion)
  - Failure to establish trust among all parties (90% said that face-to-face meetings are best at establishing a high level of trust among participants while only 2% say audio is best for trust building)
  - Less accountability (only 2% feel audio is best for making people more accountable, compared to 75% who say that face-to-face is best)
  - Slower, more complicated negotiation processes (only 7% say audio is best for making negotiations easier, while 75% say face-to-face is best)

- It's no wonder businesses seem to be missing the mark these days -- no one is fully paying attention! People are less focused and productive when they rely on phone and e-mail to conduct meetings. According to the survey:
  - The majority of people are doing other things while in meetings (only 23% pay full attention on audio, and 55% pay full attention in face-to-face meetings)
  - There is less participation in the meeting when conducted by phone (49% participate verbally via phone, and 63% participated verbally in person)
  - People don't even fully read the e-mails that are sent to them (39% are likely to delete before completion and only 27% of people are likely to read complete e-mail)

In addition respondents said they are doing other things while participating in meetings

***What are people doing during audio conferences?***

- 23% gave full attention at last audio conference
- 27% did other work
- 25% checked/wrote e-mail
- 21% doodled
- 17% ate something
- 13% surfed the web
- 13% daydreamed
- 11% engaged in side conversations with the mute button on
- 8% were not fully dressed
- 4% put the call on hold
- 4% fixed makeup/hair/did other hygiene
- 3% left the call early
- 3% played games
- 2% paid bills

***What are people doing during face-to-face meetings?***

- 55% gave full attention
- 5% did other work
- 3% checked/wrote e-mail
- 14% doodled
- 12% ate something
- 1% surfed the web
- 15% daydreamed
- 9% engaged in side conversations
- 2% were not fully dressed
- 13% left room for a break
- 2% fixed makeup/hair/did other hygiene
- 2% left the room early
- 1% played games
- 0% paid bills

- TANDBERG calculates that the cost of inefficient communication in the US for white-collar labor is **\$297 billion per year!! That's \$1.1b per day!** (Calculations are based on estimates from the US Bureau of labor statistics and the RoperASW/TANDBERG international survey:
  - Average hourly wage (\$20.14) \* Number of white collar workers in the US (70,000,000) \* Total number of hours wasted (according to TANDBERG survey) = \$297 billion/year
- While almost 22% of respondents said that they conduct most of their meetings via audio or web, only 5% of respondents actually believe that the best way to communicate is via audio or web conference. In addition, only 5% of respondents believe that audio or web communication is best at building trust among participants.
- The survey found that face-to-face communication is the preferred form of communication for 12 of 18 business objectives. Compared to audio and web, people overwhelmingly say face-to-face communication:
  - builds high trust – 90%
  - is more personal – 87%
  - reduces confusion/misunderstandings – 81%
  - is easier to understand – 76%
  - makes negotiating easier – 75%

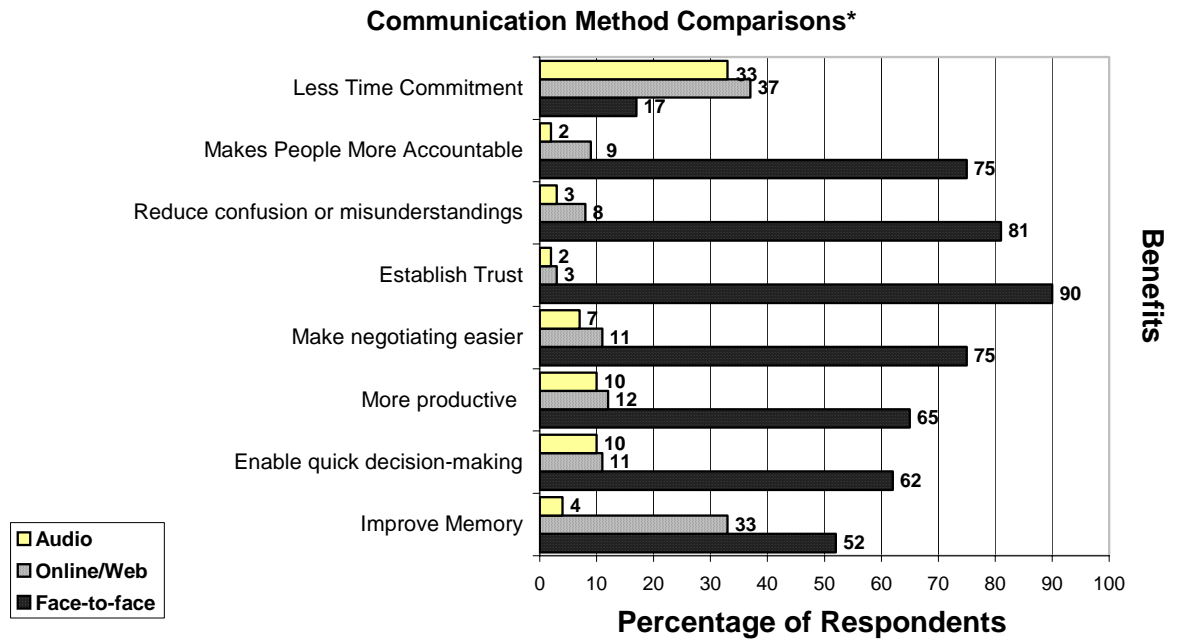
- makes people more accountable – 75%
- is better for detailed explanations – 71%
- makes discussions more productive – 65%
- enables quick decisions – 62%
- makes it easier to transcend language/cultural barriers – 53%
- is easier to remember – 52%

In addition:

- 95% say they like to see non-verbal communication
- 93% pay more attention when they see someone
- 92% say seeing someone when you are communicating with them is best

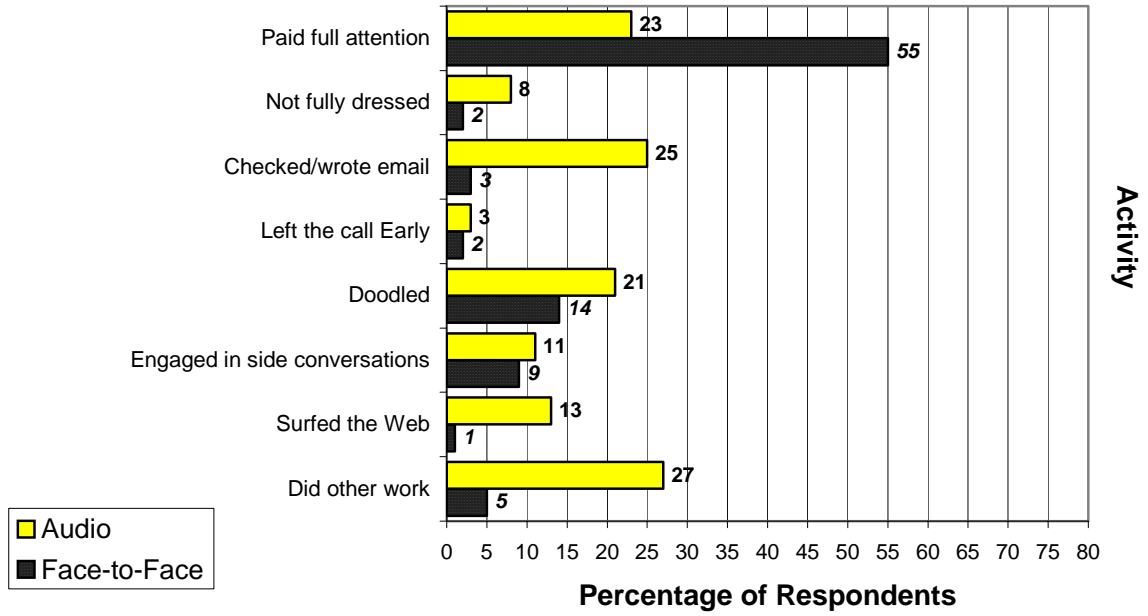
And survey respondents strongly believe video communication can offer many of the same benefits as in-person communication

- 78% say video can provide many of the same visual cues as in-person
- 63% say video can be as interactive as in-person
- 62% say video can provide similar eye-contact perception as in-person
- 82% say video is good alternative to audio or web communication



\*This represents response to 8 out of 18 questions

### How Do People Spend Time in Meetings?\*



\* This represents response to 8 out of 15 questions