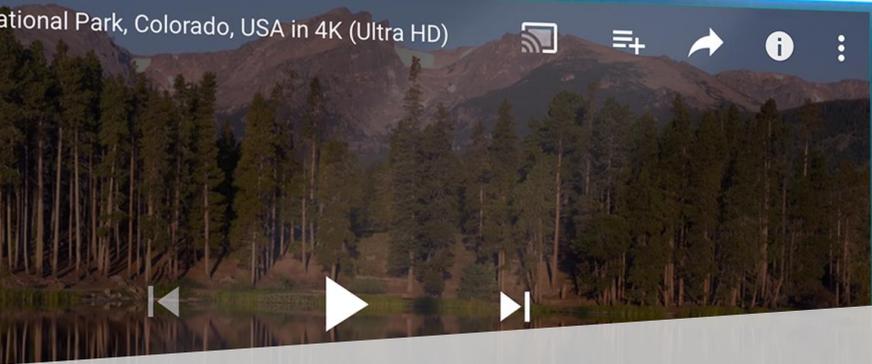


May 2019



Today's Enterprise Meeting Rooms

Insight and information about trends, priorities, and futures from enterprise IT managers responsible for their AV estate.

RECON
RESEARCH

This study sponsored by:



mersive
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Introduction

Yes – the world has changed. People are working differently. People are meeting differently. People expect – and need – more from their meeting rooms.

But just how is the enterprise addressing the changing needs of its users?

To find out, we interviewed two dozen IT decision makers responsible for their companies' global meeting rooms and AV deployments. During these discussions, we probed into key themes including:

- What is the mix of meeting rooms today, and how will this change in the near future?
- What AV equipment is currently deployed in meeting rooms, and how will this change over time?
- What department owns the budget for AV equipment in meeting rooms?
- What department decides which AV equipment should be installed in meeting rooms?
- What categories of AV equipment will see an increase or decrease in adoption over time?
- What are the most important criteria for selecting a wireless presentation vendor / solution?
- How well is your current wireless presentation solution meeting your expectations?

This study, based on primary research sponsored by [Mersive](#), provides information and insight into the enterprise meeting room estate – today and tomorrow.

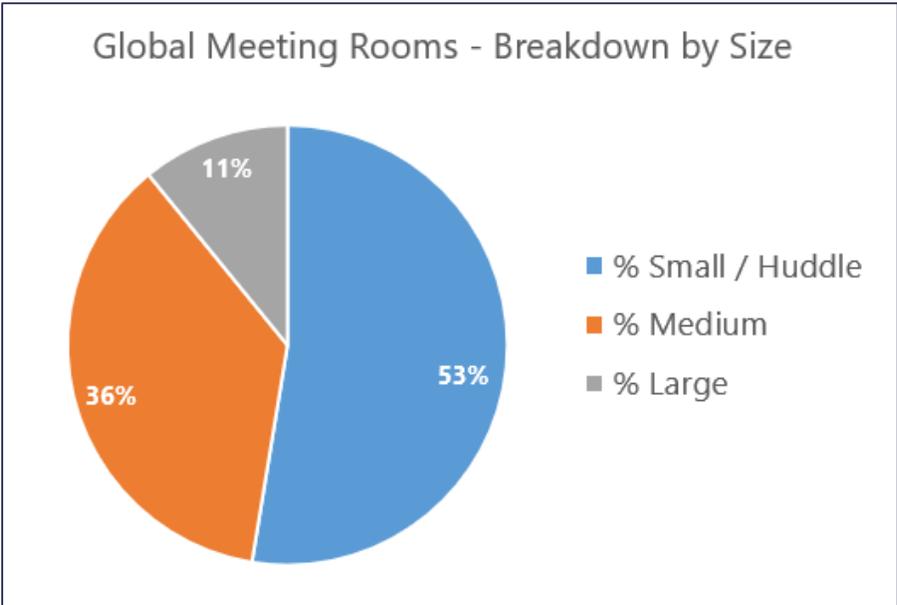
Important Notes:

In mid- to late-2018, we interviewed 24 medium and large enterprise managers who are clearly in the know on this topic. Demographic details about the interviewees is shown in the appendix of this study.

Overall, this panel of IT decision makers represents more than 55,000 meeting rooms around the world. So, although this sample set is relatively small, we consider the insights provided by these professionals to be a solid indication of meeting room and AV trends in the marketplace.

Meeting Rooms in the Enterprise

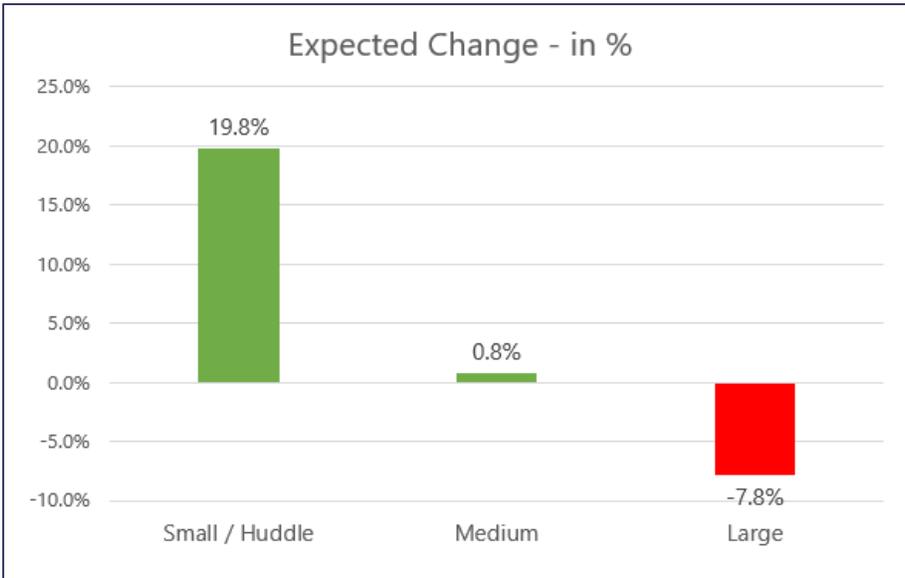
To frame our discussion, we asked our panelists about the types of rooms that make up their current global meeting room estate.



As shown above, across this sample set of enterprise managers representing more than 55,000 meeting rooms, small / huddle rooms represent more than half of the meeting rooms around the world.

At first glance, these results seem inconsistent with other research we've conducted on the meeting rooms around the world. However, please remember that this study focused on medium (1,000+ employees) and large (10,000+) enterprises only. While smaller enterprises tend to have more small rooms, larger enterprises tend to be burdened with legacy meeting room estates including large numbers of medium to large meeting rooms.

We also asked our panelists about the changes in meeting room mix they expect in the next 2 – 3 years.



As shown above, the number of small meeting rooms / huddle rooms is expected to increase by almost 20% in the next 2 to 3 years. During this same period, the number of medium sized meeting rooms is expected to grow slightly, while the number of large meeting rooms is expected to decrease significantly.

Notably, none of the 24 interviewees expected the number of small meeting rooms in their company to decrease over time. This shows that the trend toward smaller / huddle rooms is quite pervasive across medium and large enterprises.

During each interview, we spent quite a bit of time discussing the future of the interviewee's meeting room estate. Common themes expressed by the panelists include:

- Users are expecting, and even demanding, a larger number of smaller meeting rooms.
- The shift toward open work spaces is driving additional need for smaller shared spaces.
- Users are conducting more smaller, ad-hoc discussions, and thus an ample supply of smaller, informal, readily-available meeting rooms is an important part of maximizing user productivity, agility, and innovation.
- Larger meetings take too long to coordinate, while smaller meetings, with only a handful of local and remote participants, can happen in real time.
- Future space design plans and budgets will favor smaller, AV meeting rooms over larger spaces.
- Large meeting rooms are expensive to deploy, support, upgrade, and own.
- Many large rooms are used for meetings with only a few participants. This is inefficient.

We also asked our interviewees a few questions about their AV meeting room design standards. Almost all of the panelists indicated that their company has a defined set of AV standards, and that the standards in place are reasonably well followed.

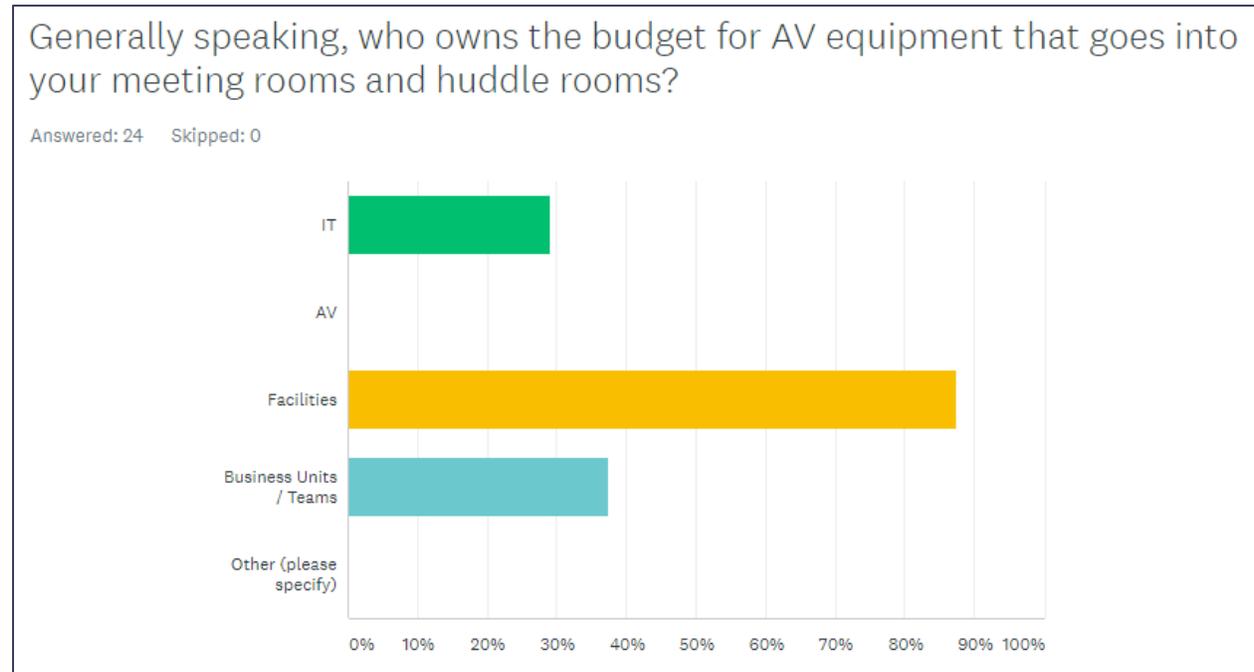
Key Takeaway(s):

- In medium and large enterprises, roughly half of global meeting rooms are small / huddle rooms.
- The trend toward smaller rooms / huddle rooms is definitely real across this sample set.
- Over time, most enterprises will deploy more small meeting rooms / huddle rooms to accommodate the trend towards smaller, less formal, ad hoc meetings.
- While larger / formal meeting rooms will never disappear, they are expected to represent a smaller percentage of the global meeting room estate over time.

Who Owns the AV Budget Today?

We then asked our enterprise representatives about who owns and manages the budget for AV technology for their meeting rooms.

Author's Note - the team at Recon Research has recently detected a slow but steady shift in this area, so we used this research exercise to validate our observations.



As shown above, almost 90% of the panelists said that facilities (sometimes dubbed real estate, corporate services, space planning, etc.) owns some, or even all, of the enterprise AV budget. This figure is in line with other research we've conducted in the past few years.

However, as we suspected, the involvement of various business units and IT in the AV budget has increased significantly in recent years. Specifically:

- For AV meeting room refresh projects, IT is often holding or managing some (or all) of the AV budget. According to several interviewees, IT's involvement in budget management is expected to increase over time.
- In smaller and branch offices, and for systems with special capabilities or design elements, the business unit, team, or specific functional group sometimes owns or manages the AV budget.

While we are not surprised by this data, it's worth noting that these findings represent a notable change from research we conducted as recently as one year ago which showed that in most cases, facilities were the primary (and typically the only) holder of the AV budget.

Based on our discussions with these IT managers and a range of enterprise customers, we believe the increased IT and BU involvement in the AV budget is due, at least in part, to a growing desire among enterprises to:

- Streamline AV system workflows to foster increased collaboration
- Improve the ease of use of AV systems to decrease support needs and maximize productivity
- Integrate AV technology into their IT management systems to decrease cost of ownership

These priorities are better handled by the future meeting room users themselves and the IT managers responsible for the ongoing support of these rooms than the corporate real-estate and global procurement folks.

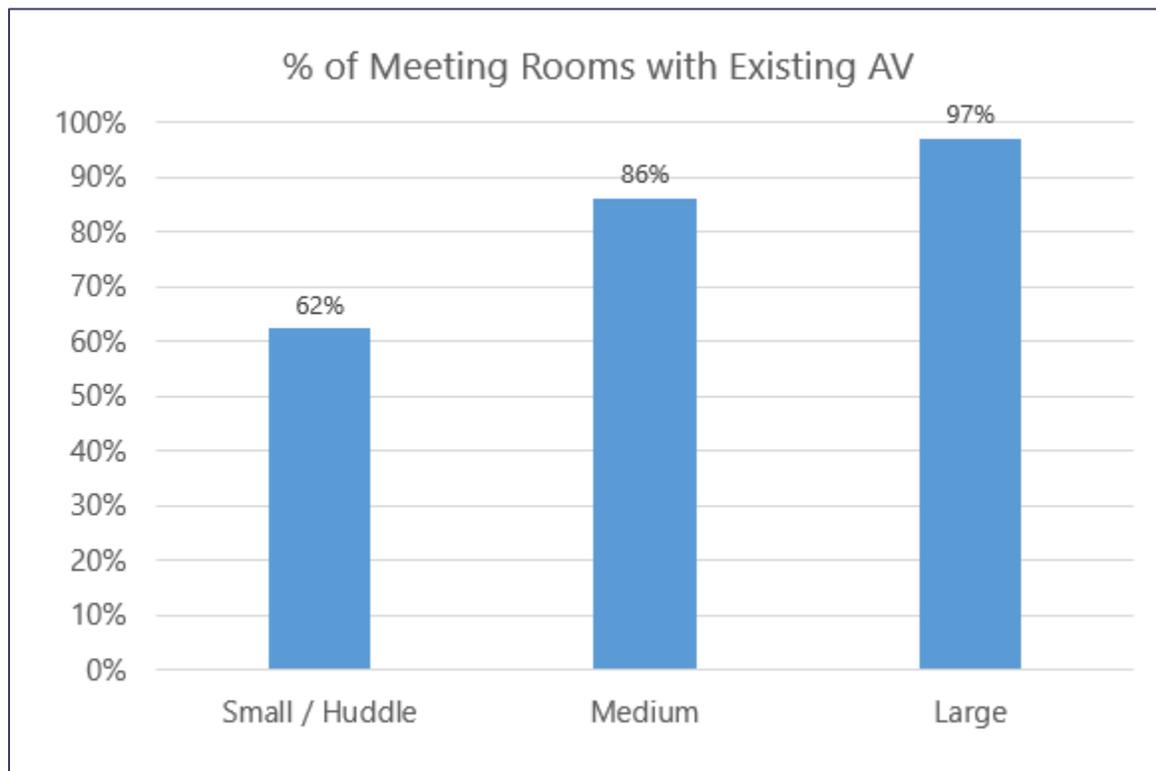
Key Takeaways:

- AV budget ownership and management is shifting in the enterprise
- IT and Business Units are becoming more involved in meeting space AV budgets

AV Technology in Meeting Rooms

We asked our panel of decision makers about the capabilities within their shared meeting spaces.

- What features / functions are in place today?
- How frequently are these capabilities used?
- What features will be available in your meeting rooms in 2 -3 years?



The chart above shows that most meeting rooms are equipped with at least a display or projector. In other words, the majority of meeting rooms today support at least the presentation of PC content.

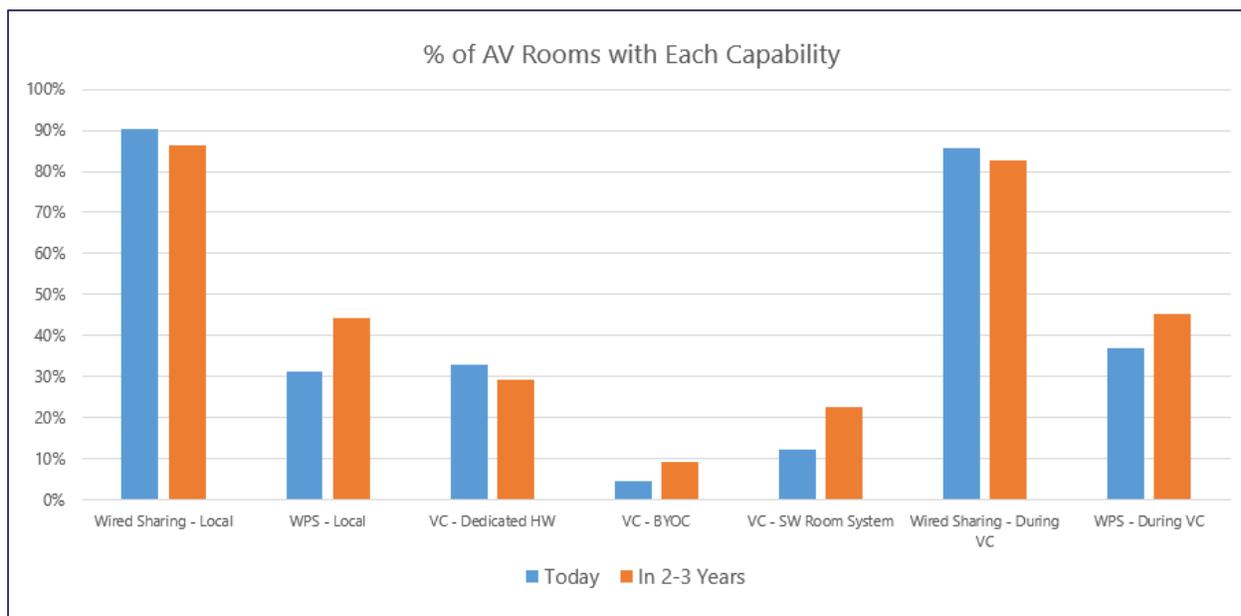
As shown above, more than 60% of their small meeting rooms / huddle rooms (defined as having 6 or fewer seats) are presentation-ready. This figure was slightly higher than expected based on our prior research into AV capabilities in huddle rooms.

Note how the percent of AV-enabled rooms increased significantly as room size (and number of seats) increases. Given the high cost of real-estate, this makes perfect sense.

Key Takeaway(s):

- Presentation capabilities are available in most meeting rooms
- In medium and especially large meeting rooms, PC presentation is almost a given

We then asked our decision makers about the specific capabilities available within each of their AV-equipped meeting rooms.



The table below provides definitions and descriptions for the AV capabilities discussed with our panel.

AV Capability	Definition / Description
Wired Sharing – Local	Connecting a content source (e.g. notebook PC) to the in-room AV system or display using a video cable (e.g. HDMI, Display Port, etc.), and displaying that content within the local meeting room only.
WPS – Local	Connecting a content source (e.g. notebook PC) wirelessly to the in-room AV system or display, and displaying that content within the local meeting room only. This is typically accomplished via the use of a wireless presentation system (WPS).
VC – Dedicated HW	Conducting a video conference meeting using a dedicated hardware video conferencing system such as those available from Cisco, Polycom, Lifesize, and others.
VC – BYOC (Bring Your Own Codec)	Conducting a video conference meeting using a user’s device (e.g. a notebook PC) running a collaboration application (e.g. Skype for Business, Zoom, Webex, etc.) to host the meeting. In this situation, the user’s notebook PC is connected to the mics, speakers, and cameras installed within the meeting room.
VC – SW Room System	Conducting a video conference meeting using an in-room PC running a collaboration application (e.g. Skype for Business, Zoom, Webex, etc.) to host the meeting.
Wired Sharing – During VC	Connecting a content source (e.g. notebook PC) to the in-room AV system or display using a video cable (e.g. HDMI, Display Port, etc.), and sharing that content with remote locations or users during a video conference meeting.
WPS – During VC	Connecting a content source (e.g. notebook PC) wirelessly to the in-room AV system or display and sharing that content with remote locations or users during a video conference meeting.

As shown above, across this sample set, wired content sharing is the most commonly found capability in an AV meeting room. However, the percent of meeting rooms supporting wired content sharing is expected to decrease slightly across the enterprise over time. While end-users frequently mention issues related to wired content sharing, this is the first data we’ve seen highlighting future reductions in meeting rooms supporting this capability.

During this same period, the percent of meeting rooms equipped with wireless presentation capabilities will increase dramatically over the next few years. This expected increase in wireless presentation, both locally and during video conferences, is in line with our ongoing discussions with end-users and IT managers seeking improved ease of use and ability to switch presenters during meetings.

Additional Notes:

- 1) As shown in the chart above, across our sample set, the number of rooms that support wireless content sharing during a video call is higher than the number of rooms that support wireless content sharing locally. The reason for this difference is that some conferencing applications used in meeting rooms also support wireless content sharing during video calls.
- 2) We also asked our interviewees for insight into the way they provided wireless presentation capabilities in their meeting rooms. Across our sample set, more than 70% of the respondents use stand-alone wireless presentation systems only (e.g. the Solstice solution from Mersive, the sponsor of this research).

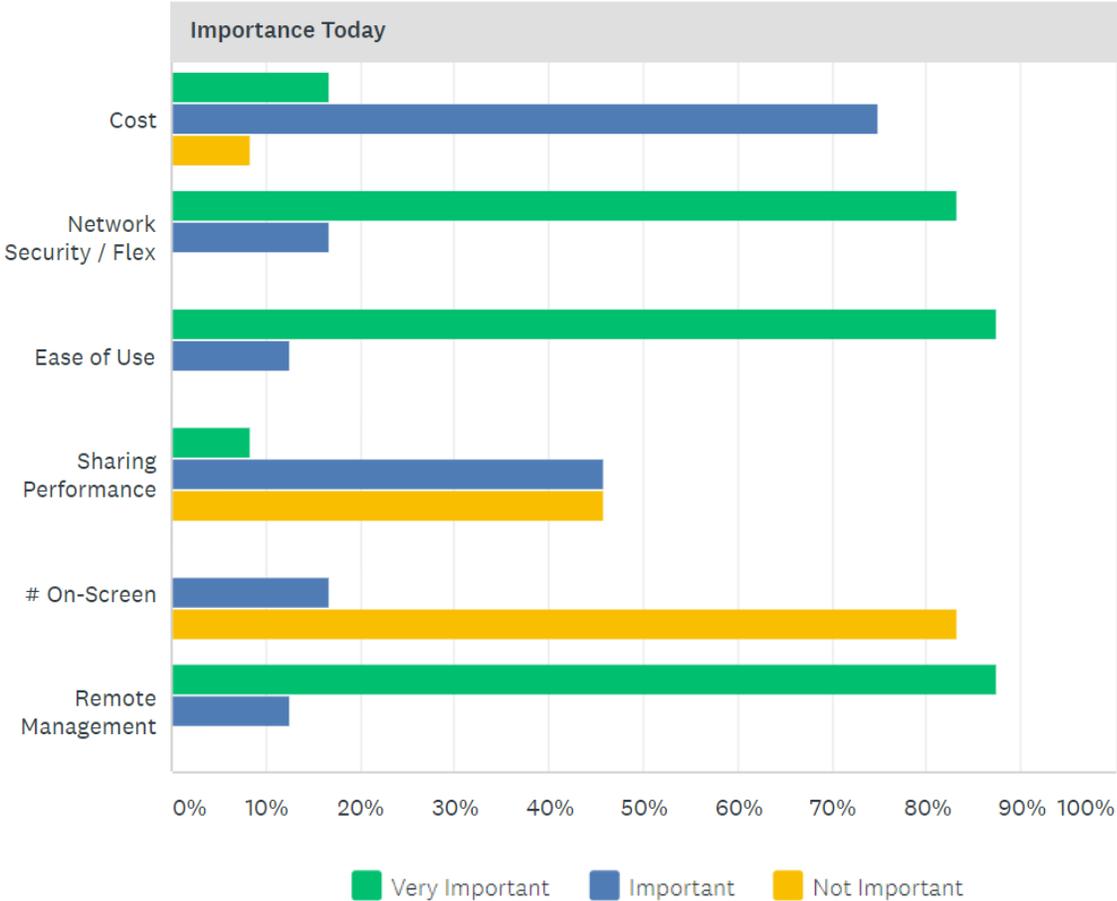
Notably, many of the interviewees said that their group video conferencing systems (e.g. Cisco, Polycom, etc.) also offer embedded wireless presentation capabilities. However, most said that this capability wasn't heavily used by meeting room participants.

Key Takeaway(s):

- Wired content sharing is by far the most commonly deployed capability in meeting rooms; however, that is expected to decline slightly over time.
- The percent of meeting rooms equipped with wireless presentation capabilities is expected to increase significantly in the next 2 – 3 years.

What Really Matters When Choosing a Wireless Presentation System?

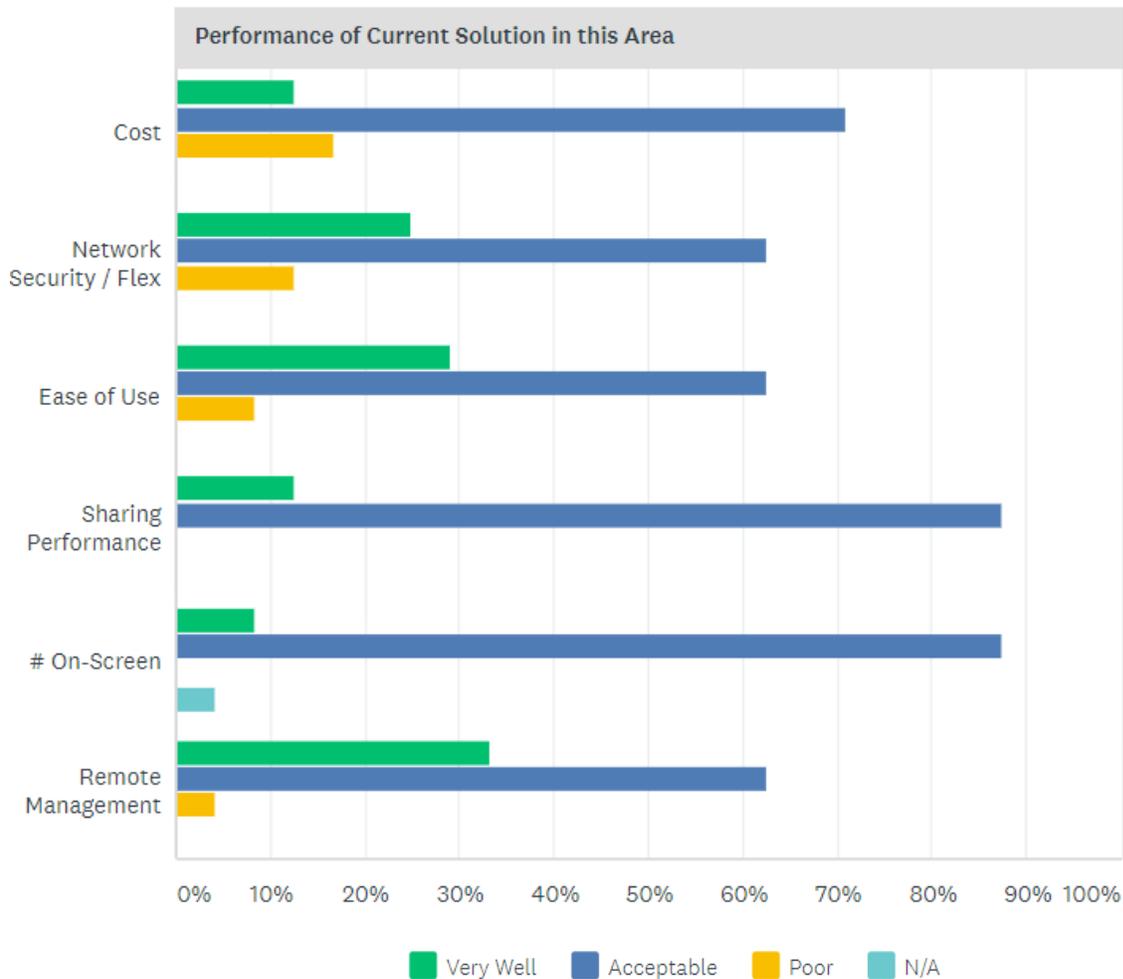
Given the strong expected growth in the percent of rooms that support wireless presentation, we then asked our decision makers for insight into the criteria that drive them to choose one vendor / product over another.



As shown above, the key product selection criteria for wireless presentation solutions are ease of use, remote management, and network security / flexibility.

Many of the end-user interviewees took it upon themselves to explain why cost was not the #1 factor. The consensus was that while cost is always a consideration for any technology purchase, when choosing a wireless presentation solution, other items are far more critical.

We then asked our panel to rate the performance of their current wireless presentation solution in each of the same areas.



The responses to the follow-on question reveal that while most of the end-user representatives consider their current solution to be at least acceptable, there is significant room for improvement – especially in the areas that matter most: ease of use, remote management, and network security / flexibility

For example, almost 90% of the interviewees said Ease of Use was a very important product selection criterion, but less than 40% said their current wireless presentation solution does very well in this area.

Similarly, almost 90% said that Remote Management was very important, but only 33% gave their current solution top marks (a very well rating) in this category.

Furthermore, more than 80% said that Network Security / Flexibility was critical, but only 25% gave their current wireless presentation solution a very well rating.

Key Takeaway(s):

- Although cost always matters, other factors (ease of use, remote management, and network security / flexibility) are far more important.
- In general, the deployed wireless presentation solutions are doing an acceptable job, but there’s still much room for improvement and innovation in the areas that matter most to enterprises.

Solution Spotlight – Mersive Technologies

The sponsor of this study, Mersive Technologies, is a wireless collaboration software company based in Denver, Colorado, with offices worldwide. Its flagship product Solstice is a content sharing and meeting space platform use by more than 6,000 corporate and education customers worldwide.



Solstice is a wireless collaboration platform suitable for meeting spaces and classrooms of all sizes that allows users to share content without having to physically connect their device to the AV system. The system allows users on various devices (mobile devices, notebook PCs, etc.) to share content wirelessly using either the device's native screen sharing protocol or using Mersive's Solstice app.

Key Solstice features include the ability for multiple users to share content simultaneously, and for mobile users to highlight and mark-up content directly from their smartphone. In addition, Solstice provides a consistent experience for all users – regardless of the device or operating system used.

Mersive offers Solstice in two forms: Solstice Pod and Solstice for Windows.

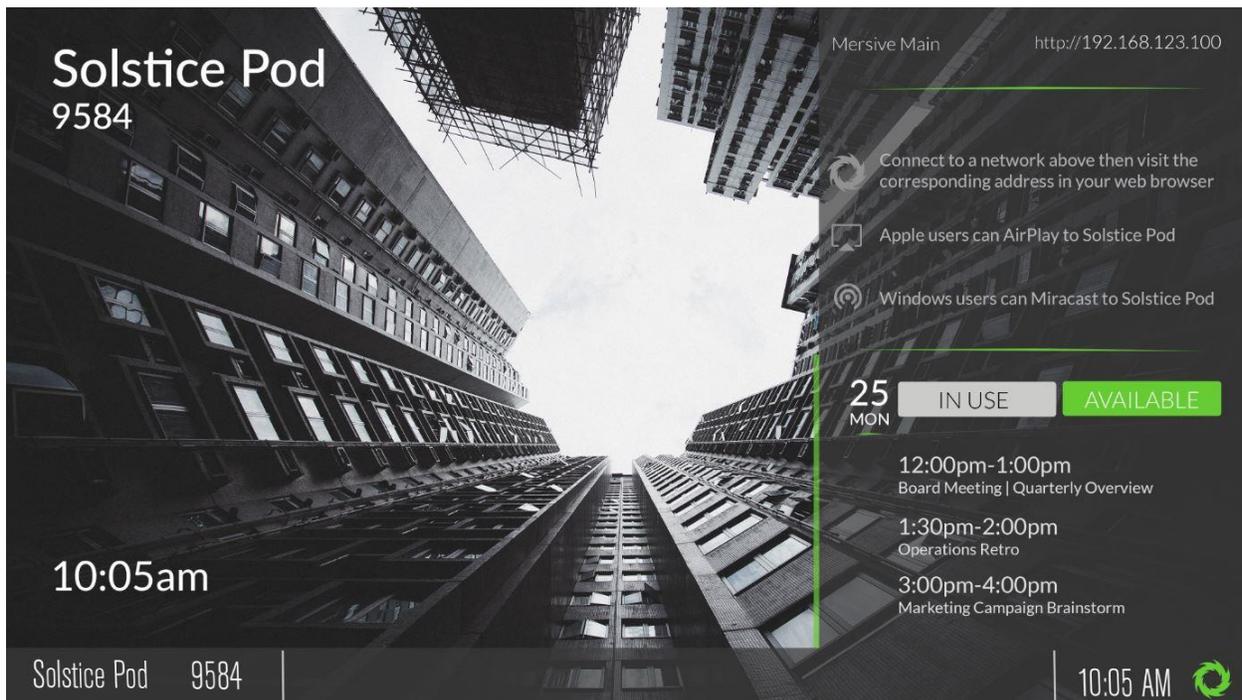
- The Solstice Pod is a hardware platform manufactured by Mersive containing a high performing, industry standard mobile CPU running the Solstice software. The Solstice Pod Gen3 shown below includes a wired input, dual outputs, full 4k streaming, and PoE+.
- Solstice for Windows is a version of the software that can be downloaded and installed on a Windows PC provided by the customer.

The Solstice Pod allows users to connect to the screen through a direct Wi-Fi connection or the corporate network infrastructure. The latter configuration is often preferred by IT departments because it utilizes the Pod's dual network cards that are firewalled from one another, allowing one card to connect to the corporate network, while the other connects to the wireless guest network. This configuration provides the highest level of security and performance.

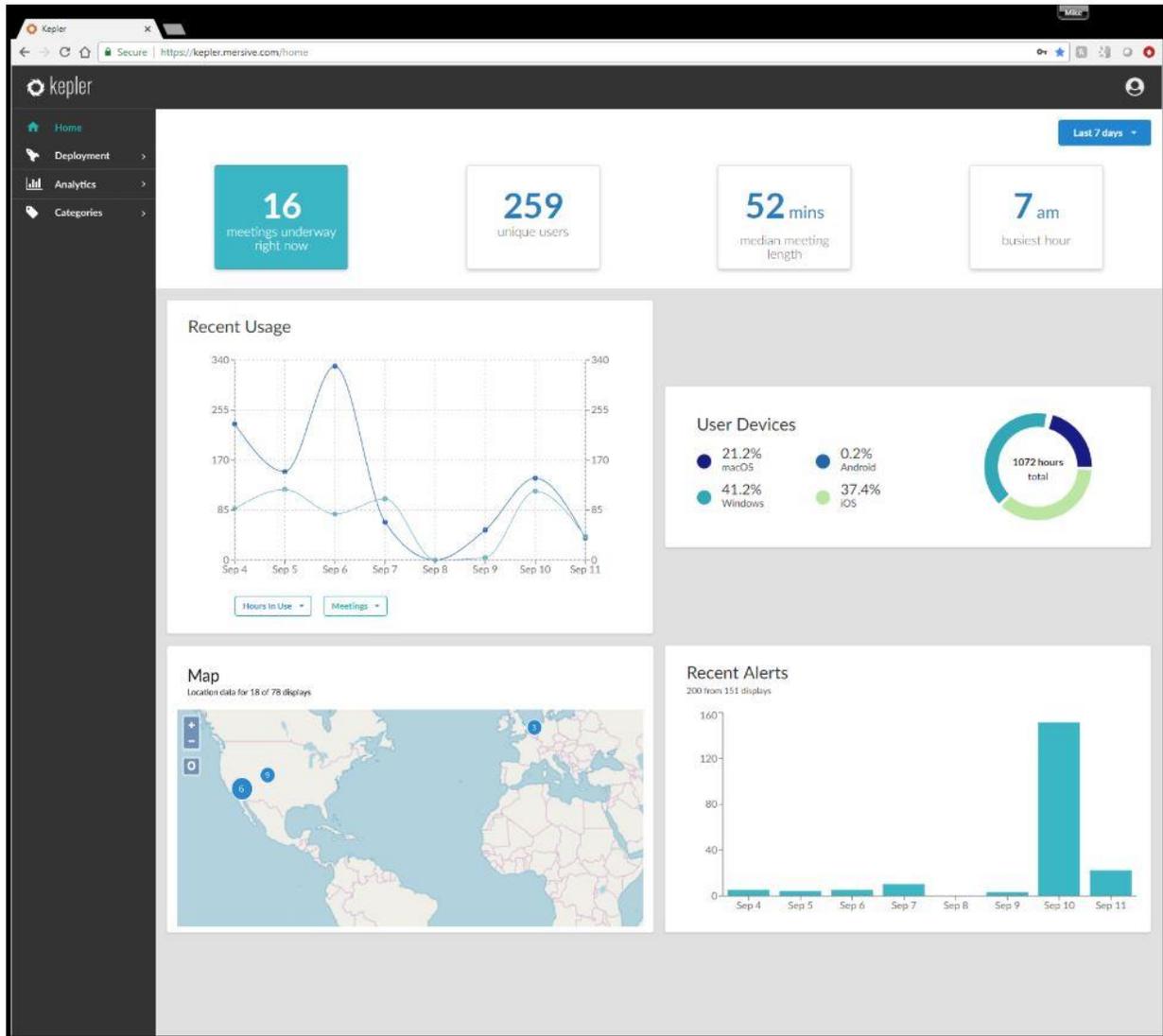


Solstice also provides a number of additional functions including customizable welcome screens, local language support, room calendaring (see image below), and digital signage playback. These features eliminate the cost and complexity of purchasing dedicated systems to perform each function.

Solstice Dashboard allows IT managers to configure these features as well as centrally secure, manage, and upgrade an entire Solstice deployment from one PC.



Mersive also provides cloud-based monitoring and analytics tool, Kepler, which provides IT managers with the insights needed to optimize the ROI of Solstice-enabled meeting spaces.



Kepler provides analytics such as room utilization, peak meeting hours, average meeting duration, device types connected, and average number of posts per meeting. And Kepler’s proactive monitoring functionality helps administrators detect and resolve any Solstice-related issues before they impact the user community.

Summary

Today's information workers need more than just places to meet. They need (and expect) meeting rooms that empower them to present information, collaborate with remote workers, solve problems, and make informed decisions in real time.

To learn more about how enterprises are addressing the AV meeting room needs of their workers, we interviewed enterprise IT decision makers responsible for their meeting room environments.

In general, we found that organizations are increasingly focused on building and AV-enabling smaller meeting spaces (a.k.a. huddle rooms). In most cases, the facilities / real-estate team is involved in the budget process for these spaces, although IT and often the sponsoring business units are also involved in the planning of the new spaces.

According to our panel of enterprise managers, most of their meeting spaces are already equipped with at least a display to support content presentation. And notably, the percent of rooms supporting wireless presentation is expected to grow significantly in the next 2 – 3 years.

When selecting a wireless presentation system, the key decision criteria are ease of use, network security / flexibility, and remote management. And in most cases, our interviewees indicated that their current wireless presentation solution is performing acceptably, but not as well as they would like. In other words, there's room for improvement and additional innovation in the wireless presentation marketplace.

Overall, these technology managers indicated that their organizations are seeking to build more agile work environments that maximize productivity. And tools like video conferencing and content sharing – and especially wireless content sharing – are key elements of their collaboration strategies.

About Mersive



(Information below provided by Mersive)

Mersive provides a wireless collaboration platform that enables multiple users to simultaneously and securely share content from computers, tablets, and phones to any meeting room display. Solstice vastly increases meeting productivity by allowing multiple users to share and annotate content with great ease of use. Moreover, corporations and universities can centrally manage, monitor, and analyze their deployment from a single console to obtain insights that help measure and optimize the ROI of their meeting spaces.

With over 6,000 corporate and education customers and 30 of the Fortune 100, Mersive is changing how industry leaders worldwide work and learn.

For more information, visit www.mersive.com.

About Recon Research



Recon Research (RR) is an analyst and market research firm focused on the enterprise communications space. Our areas of coverage include unified communications, video conferencing, collaboration and ideation, audio visual / AV solutions, wireless presentation systems, and more.

RR provides enterprise customers, vendors, channel partners, and investment professionals with the information and insight they need to make fact-based decisions.

What makes RR different is the depth of our knowledge and experience that comes from 15+ years of company briefings, market analysis, and hands-on testing of communication products and services.

For more information, visit us at www.reconres.com.

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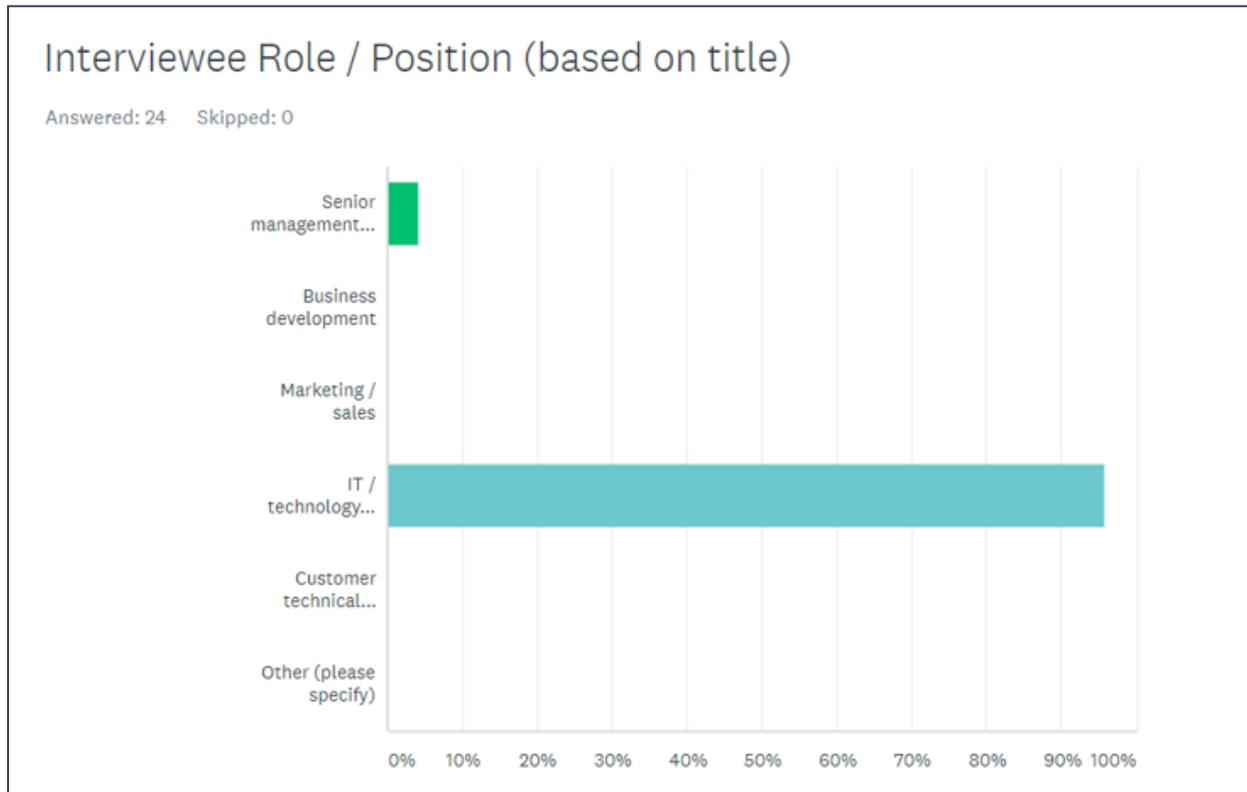
Appendix A – Demographics

This section provides demographical information about the twenty-four (24) IT decision makers / managers interviewed by Recon Research as a part of this primary research effort.

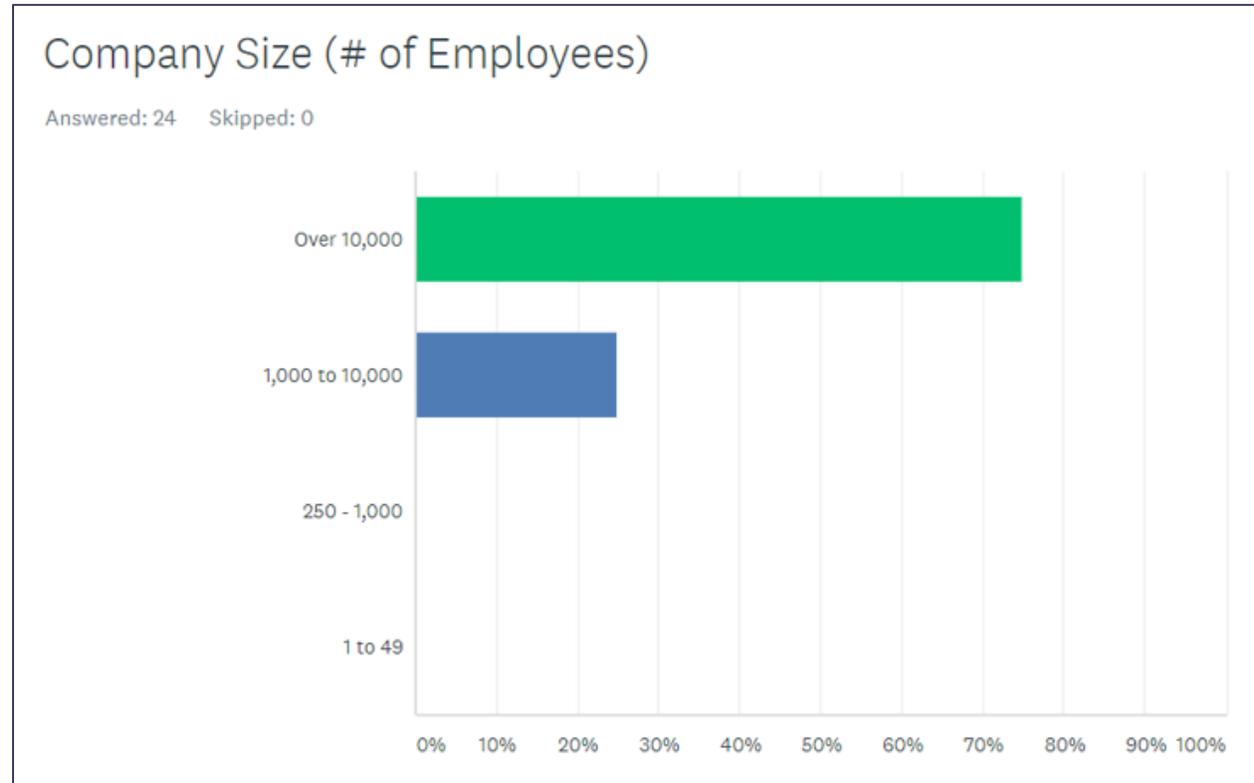
Interviewee Title

UC Manager	Engineer
Audio Visual Engineer	Global AV Leader
Global IT Manager	Solution Architect / Manager
Senior Engineer / Manager - Technology	Senior Project Manager
Enterprise Unified Communications Specialist	VC / AV / Telemedicine Specialist
Communication Technology Supervisor	Lead AV Engineer
Global Head of Collaboration Technology and Systems	Collaboration Manager
Consulting Systems Engineer / Designer	AV Manager
Project / Program Management Executive	VP - Product Management - Collaboration
Engineering Director	Senior Multimedia Manager
Global Communications	Manager - AV and Video Technologies
CIO	Multimedia / AV Manager

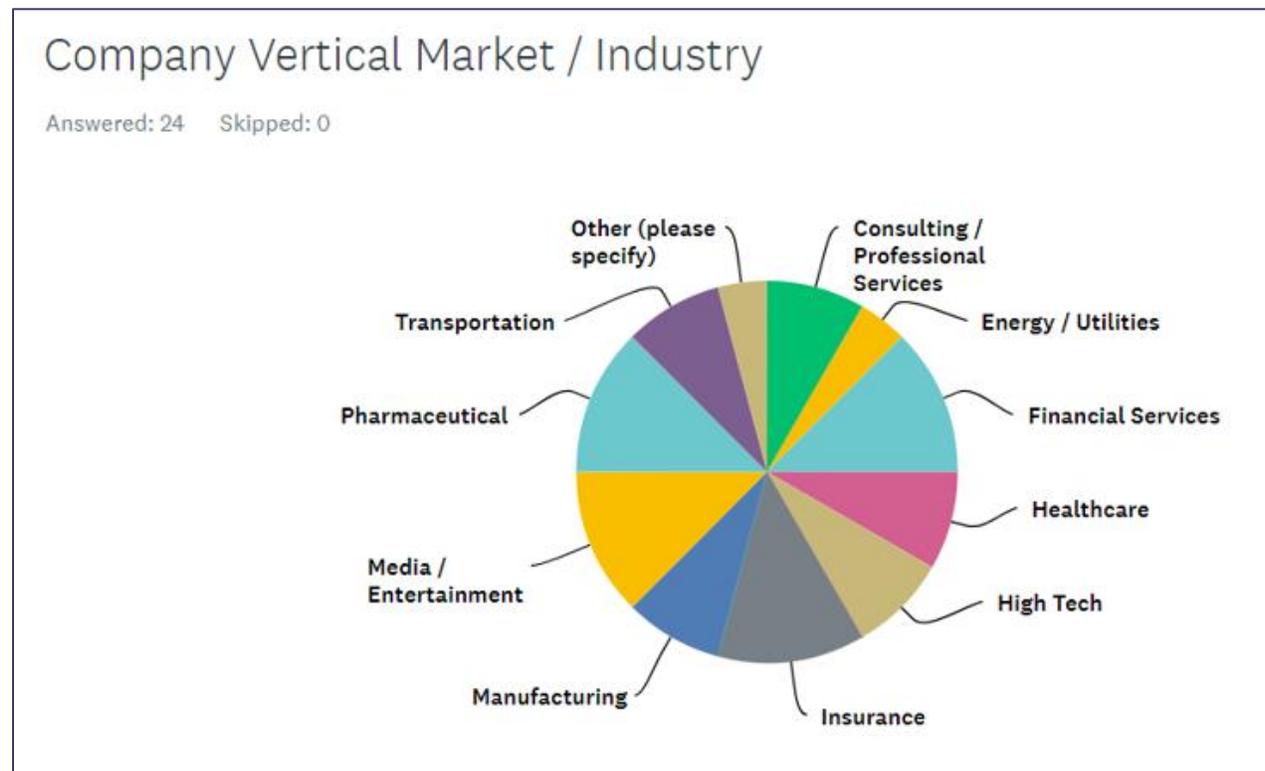
Interviewee Role / Position



Company Size



Industry / Vertical Market



Involvement in AV Decisions

How involved are you in the meeting room, AV, and collaboration decisions within your company?

Answered: 24 Skipped: 0

