



Survey Results: Usage Trends of Collaboration Technology by Business Travelers 2004

Wainhouse Research, www.wainhouse.com, conducted an online survey from April 13 through April 20, 2004 to determine if the habits of frequent travelers and their usage of collaboration technology have changed in the last year, and to compare these results to a similar survey conducted in August 2002 – just one year after 9/11.

Specifically we were seeking:

- Whether travel habits have changed due to war, terrorism, and general worldwide unrest
- What drives the usage of collaboration technology & services
- Which types of collaboration services are people using
- What personal & professional benefits are realized through the use of travel alternatives

An invitation to take the survey was sent to the subscriber list of the WR Bulletin and was promoted in [IVCI](#)'s newsletter. Five \$50 gift certificates were offered as an incentive, with the winners to be drawn at random. Response was excellent, with 480 total responses, of whom 150 classified themselves as end users and 30 as "other". Thus this report analyzes the responses from individuals in enterprises, small to medium business, education, government and military, and other institutions. Vendors, resellers, and service providers in the conferencing industry were *not* included in these results. Many questions were intentionally kept similar or identical to questions from the [August 2002 survey](#) and many new questions were posed to solicit emerging trends.

Highlights from the survey start on the next page, followed by the survey demographics and other questions. Each of the graphs below represents the results from the most recent 2004 survey. Tables illustrate comparative data between the 2002 and 2004 survey where either identical or similar question was posed.

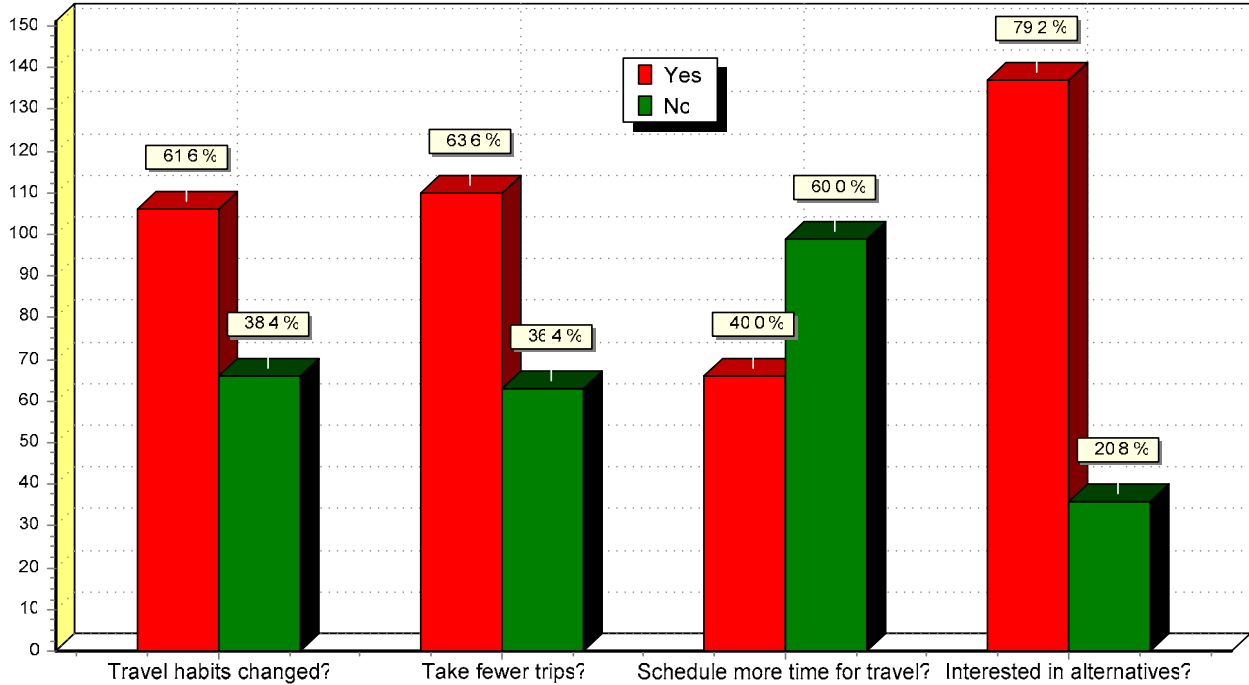
Questions or comments? Please contact: Marc Beattie, mbeattie@wainhouse.com

This survey was sponsored by



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1) In the last year – due to war, terrorism, security inspections, etc - have your business travel habits changed?

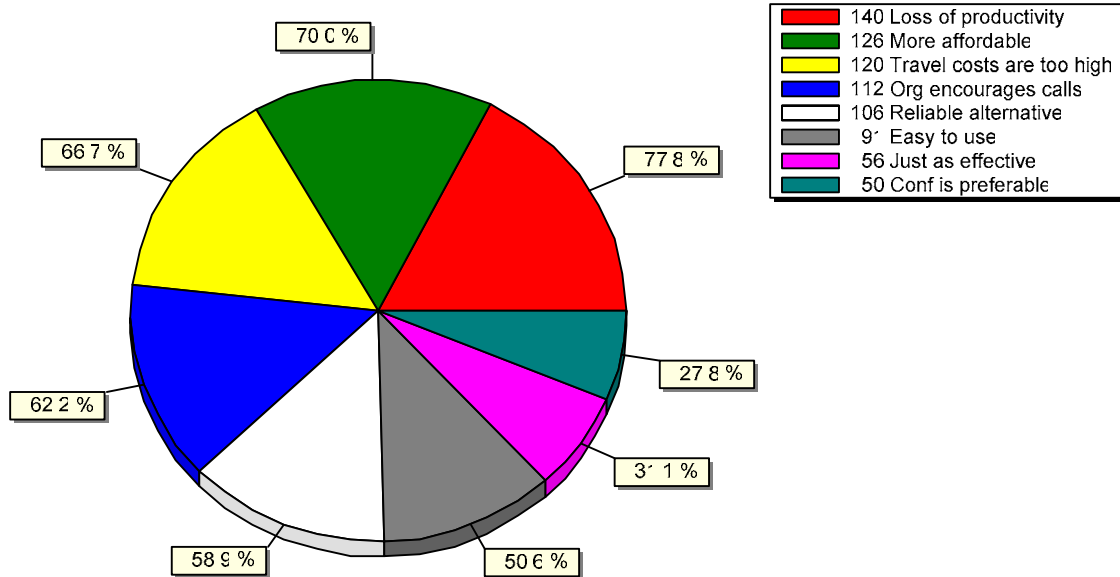


	2002		2004	
	Yes	No	Yes	No
Travel habits changed?	44%	66%	61%	38%
Take fewer trips?	44%	66%	63%	36%
Schedule more time / travel?	47%	63%	40%	60%
Interested in alternatives?	72%	28%	79%	21%

War, terrorism, and the increased inconvenience of travel have driven an increasing number of business travelers to change their travel habits. As a result, more travelers have taken fewer trips and a significant number are interested in alternatives. 61% of the respondents stated that their travel habits have changed in the last year which is a 17 percentage point increase from 2002. 63% are taking fewer trips – a 19 percentage point increase from 2002. 79% are interested in travel alternatives, a 7 percentage point increase over 2002.

2) What are the factors that drive meetings to be done via conferencing vs. in-person? Please check all that apply:

- My organization encourages conference calls
- I believe conferencing is frequently preferable to in-person
- Conferencing technologies are easy to use
- Conferencing technologies are a reliable alternative
- Conferencing technologies are just as effective
- Conferencing technologies are more affordable
- Travel costs for in-person meetings are too high
- Loss of productivity due to travel

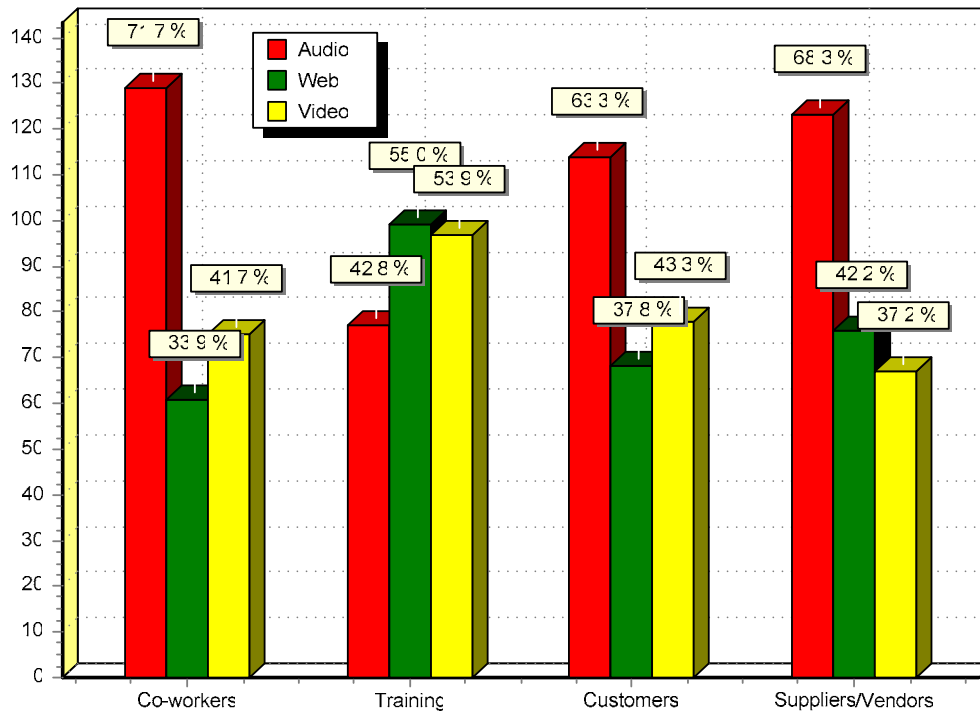


	2002	2004
Travel reduces productivity	1	77%
Just as effective	2	70%
Conf. is more affordable	3	67%
Easy to use	4	62%
Reliable alternative	5	59%
High travel costs	6	51%
Conf. is preferable	7	31%
Organization encourages conf. calls	8	28%

In 2002 this question was asked inversely (“What are the factors that drive meetings to be done in-person?”) and thus the inverted relative ranking is relevant (not the absolute percentages) for comparison to the 2004 question.

The 2002 and 2004 surveys both resulted in “Loss of productivity due to travel” as the #1 factor for using conferencing. From here the two surveys switched the importance of two groups of factors. The 2004 survey prioritized “Affordable” and “High travel costs”, which address business operations issues. Conversely, the 2002 survey prioritized “Just as effective” and “Easy to use”, which are personal preference issues. We believe this shift is a strong indication that conferencing has moved from personal preference issues to becoming an accepted core technology for addressing business operations issues. The rise of “organization encourages conference calls” is also a strong indication of this.

3) In which of the following areas do you use these conferencing technologies? Please check all that apply:

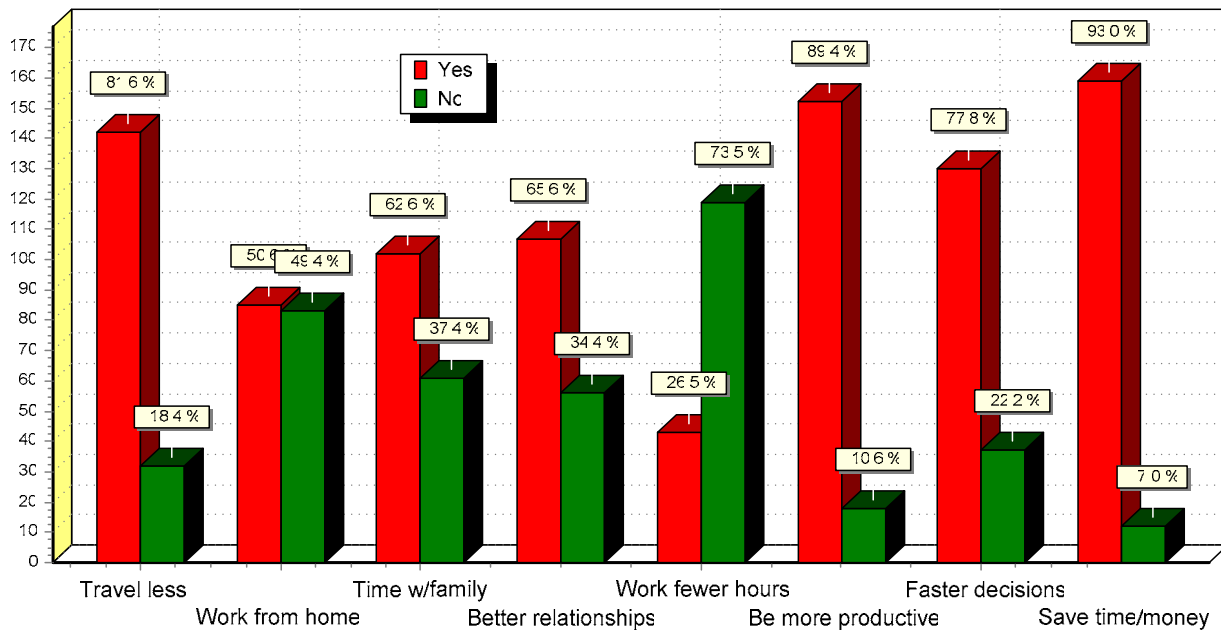


	2002			2004		
	Audio	Web	Video	Audio	Web	Video
Co-workers	81%	23%	35%	72%	34%	42%
Training	32%	48%	41%	43%	55%	54%
Customers	75%	32%	41%	63%	38%	43%
Suppliers	73%	28%	32%	68%	42%	37%

An increasing number of users are employing audio, video, and web conferencing when collaborating internally, with clients, and with trading partners. Increases in the use of web and video conferencing are impressive, but do not appropriately illustrate the growth in these areas. Separate data from WR for the same period indicates a dramatic increase in expenditures for audio, web, and video services and equipment.

4) If some of your in-person meetings were converted to audio, web, or video conferencing would you:

- Travel less
- Work from home
- Be able to spend more time with family/friends?
- Cultivate better relationships with co-workers, customers, partners?
- Work fewer hours?
- Get more work done - be more productive?
- Be able to make faster decisions?
- Save the company time and money?



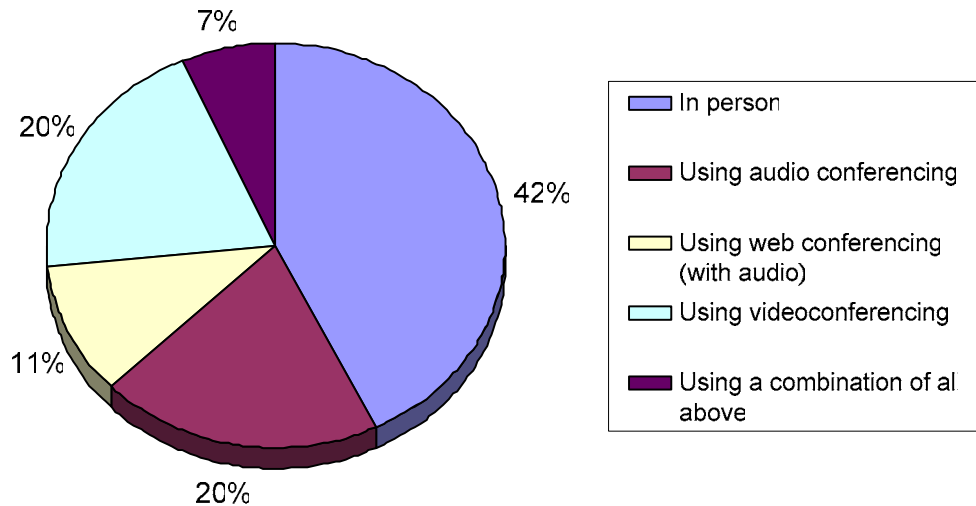
	2002		2004	
	Yes	No	Yes	No
Travel less	N/A	N/A	82%	18%
Work from home	78%	22%	50%	49%
Time w/ family	73%	27%	62%	37%
Better relationships	43%	57%	66%	34%
Work fewer hours	42%	58%	27%	73%
Be more productive/competitive	64%	36%	89%	11%
Faster decisions	67%	33%	78%	22%
Save time & money	N/A	N/A	93%	7%

Not all the same questions were asked between the 2002 and 2004 surveys. N/A in the 2002 category indicates new questions asked in 2004. When presented with travel alternatives using conferencing an impressive 93% stated they would save time and money, 89% would be more productive, 78% would be able to make faster decisions, 82% would travel less. On a personal level 62% would benefit through increased time with family and 66% believed that conferencing would improve their relationships with others.

Comment: The 2002/2004 comparison data is impressive here. The significant news is that since the 2002 survey business travelers have recognized the hard business benefits that conferencing provides – the ability to make faster decisions and become more productive.

5) What percentage of your meetings did you have in the last year ...

Your responses should total 100%:



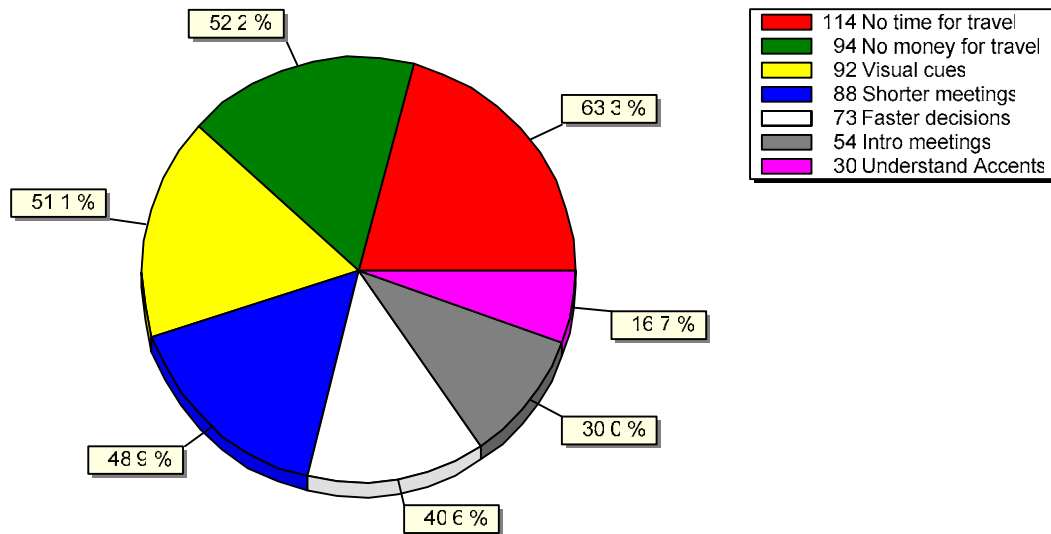
	2002	2004
In-person	45%	42%
Audio conferencing	30%	20%
Web conferencing	8%	11%
Videoconferencing	16%	20%
Combination – all above	N/A	7%

58% of today's meetings are held via collaboration and conferencing technologies compared to 55% two years ago. A new question for 2004 queries the use of multiple technologies. The responses indicate that an increasing number of users are shifting away from pure audio conferences to conferences that include rich-media elements – audio, web, and video.

6) What are the factors that drive video meetings?

Please check all that apply:

- No time for travel
- No money for travel
- Can get to consensus on decisions faster
- Can read body language/facial cues for comprehension/resistance
- Can understand accents more easily
- Video meetings are often shorter
- Best way to hold introductory meetings

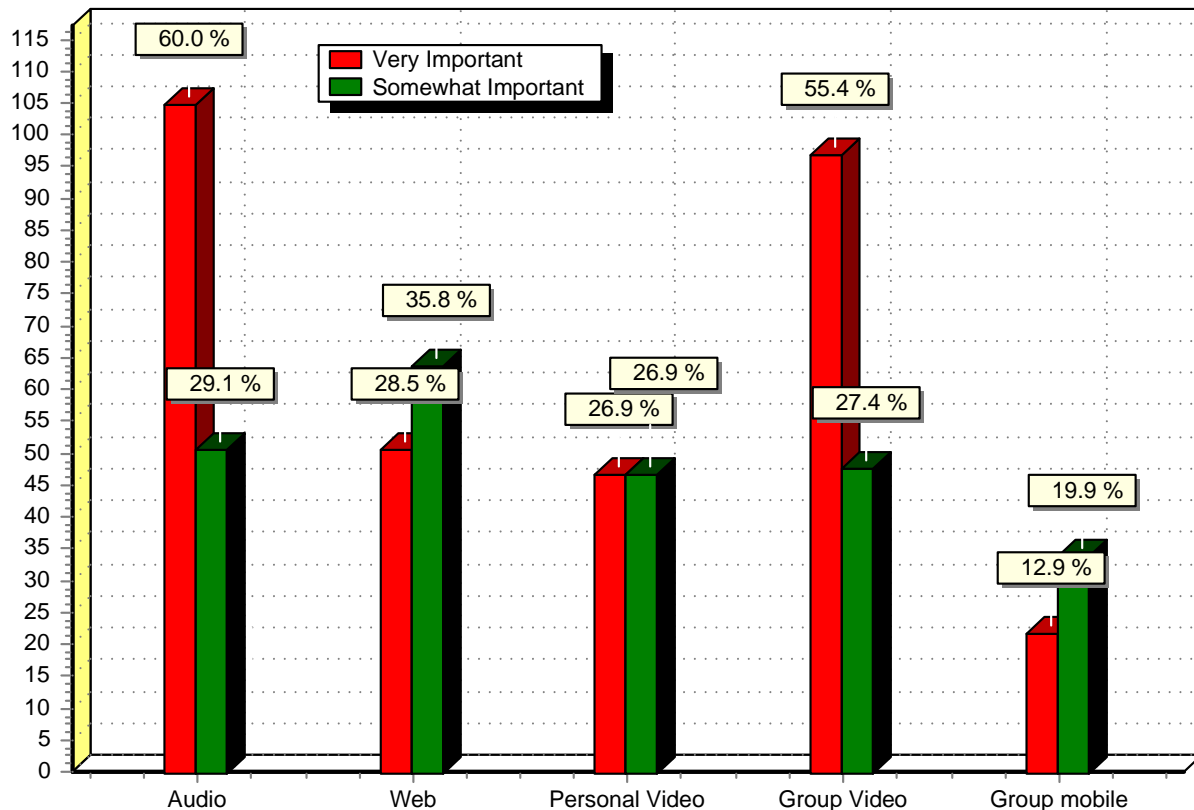


	2002	2004
No time for travel	N/A	62%
Visual cues	N/A	56%
No money for travel	N/A	47%
Shorter meetings	N/A	46%
Faster decisions	N/A	44%
Introductory meetings	N/A	33%
Understand accents	N/A	19%

This is a new question for 2004 specifically inquiring the drivers for the use of videoconferencing. The top benefits in using video include saving wasted time associated with travel, the ability to pick up the visual cues associated with body language, the constraint of internal funds for travel, and meetings which can often be shorter than those in-person.

7) Rank the following technologies in order of their potential positive impact to your business productivity

- Very Important
- Somewhat Important
- Not very Important
- Not important at all



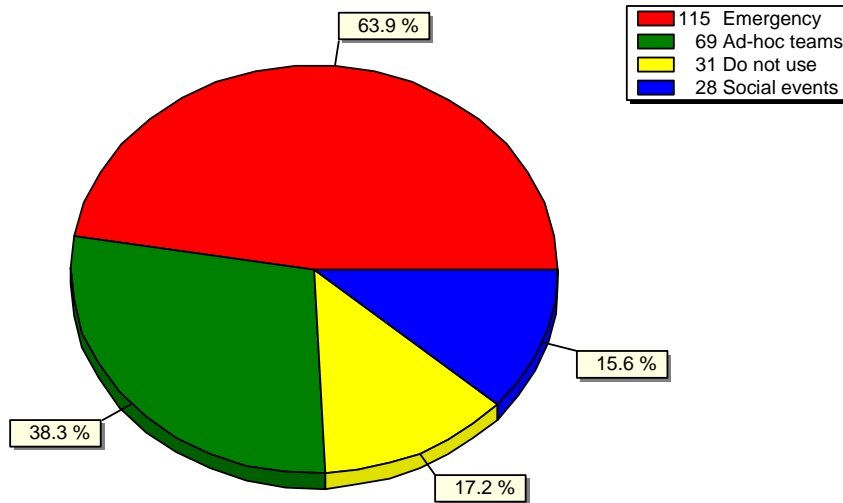
This question seeks to isolate the value of specific technologies on an individual's productivity. The 2002 survey asked a similar, yet different question whereby audio, video, and web were grouped together. The 2002 questions focused more on the value of access than on the impact to business productivity. In 2002 64% respondents indicated that access to all three was "very important".

In 2004 we asked that several different types of conferencing be rated separately with respect to its potential for positive impact on business productivity. 60% of the respondents indicated that audio conferencing was "very important" (with an additional 29% indicating "somewhat important") followed closely by 55% that indicated group videoconferencing was very important (with an additional 27% indicating "somewhat important"). Web conferencing and personal videoconferencing followed on the next tier scoring 29% and 27% respectively for "very important". Group mobile lagged, most likely because this technology is in the early phases of adoption.

8) What would drive your use of instant group calling on your mobile phone or wireless PDA?

Please check all that apply:

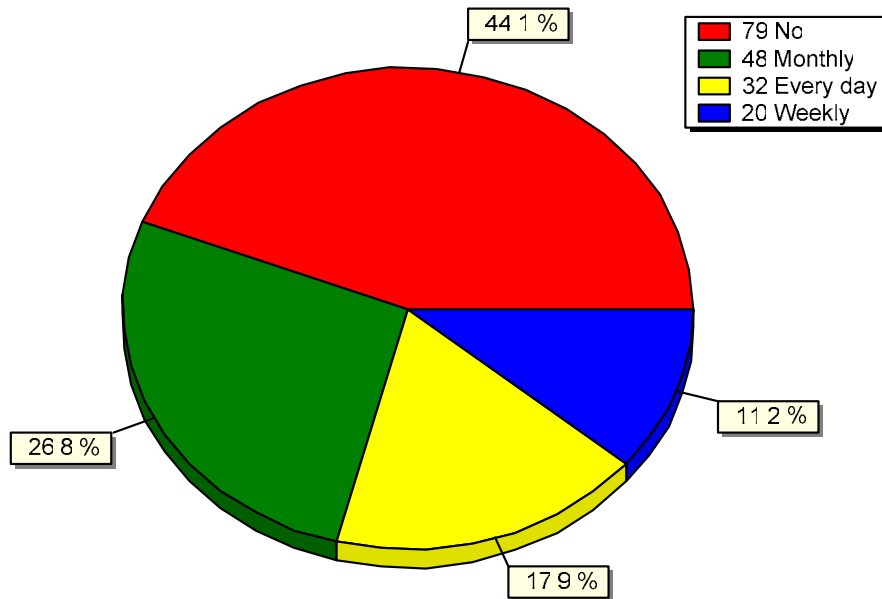
- Emergency situation (work or personal)
- Ad-hoc team meetings (conference at a moments notice)
- Planning social events with friends & relatives
- Nothing – don't use mobile phone or PDA



	2002	2004
Emergency	N/A	64%
Ad-hoc teams	N/A	38%
Social events	N/A	16%
Do not use	N/A	17%

WR believes that most people have not experienced instant group calling and thus cannot properly quantify how they would use it. Nonetheless, the response of 64% and 47% respectively for the use of instant group calling for emergencies and ad-hoc teams is impressive.

9) Do you telecommute to work?



	2002	2004
Every day	N/A	21%
Weekly	N/A	14%
Monthly	N/A	29%
No	N/A	36%

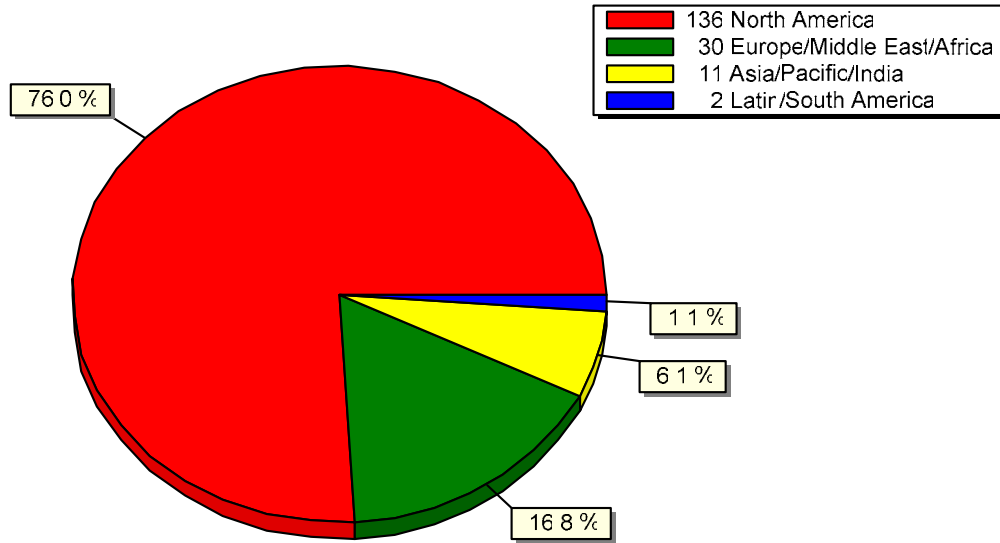
This question is new to the 2004 survey.

The results struck us as very polar. While 18% of respondents said they telecommute every day – an impressive percent which we think reflects the growing acceptance of conferencing technologies for accomplishing every day work – 44% said they do not telecommute at all.

Think of the productivity that could be gained (and fossil fuel saved)

Respondent Demographics

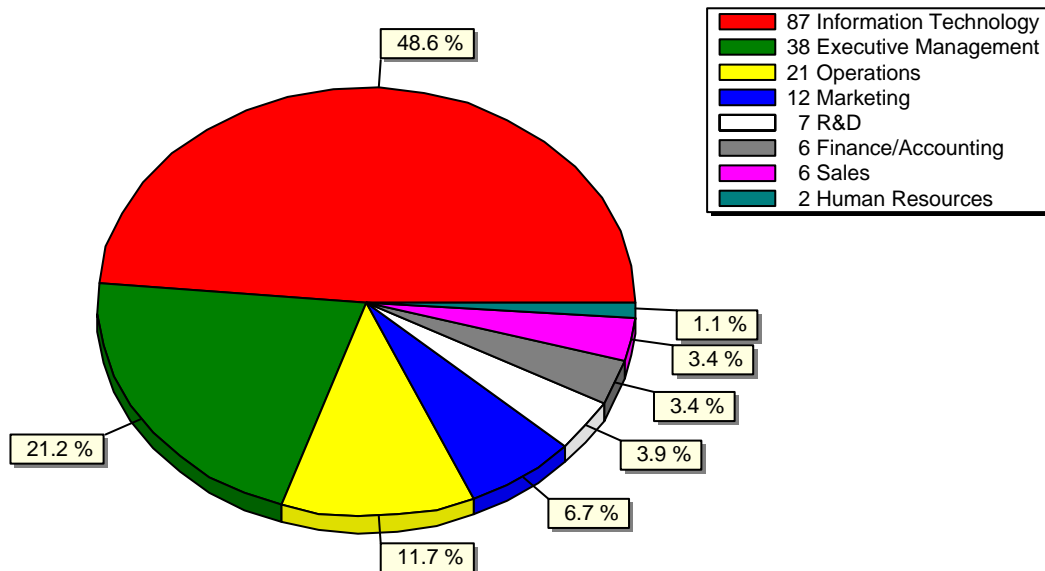
10) Where are you located?



	2002	2004
North America	76%	76%
EMEA	17%	17%
APAC	5%	6%
Latin / SA	2%	1%

The geographic distribution of 2004 vs 2002 was amazingly flat.

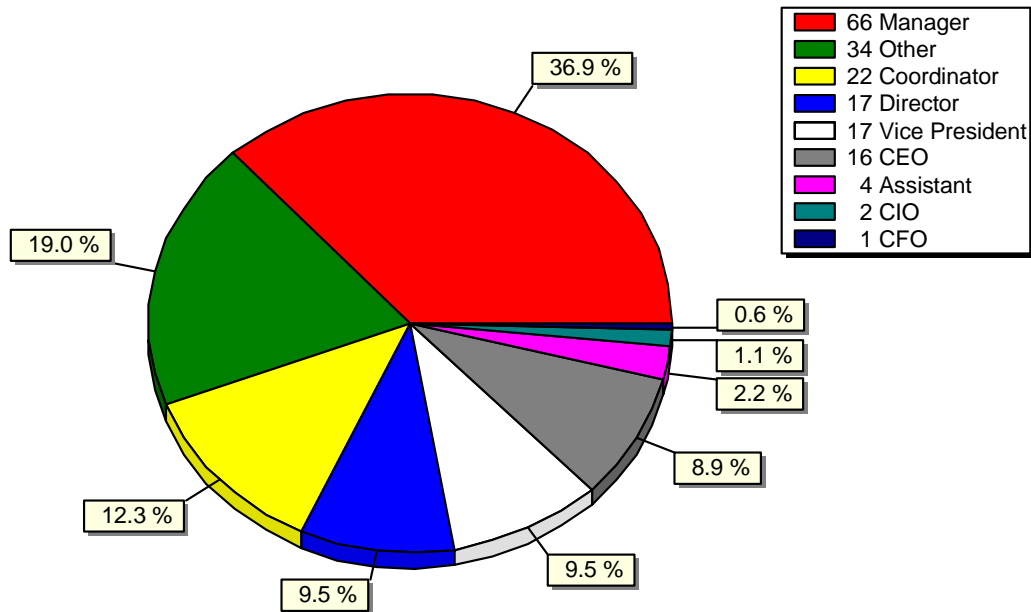
11) Which best describes your job function?



	2002	2004
Executive management	14%	21%
Sales	22%	3%
Marketing	17%	7%
IT	24%	49%
Eng / R&D	10%	4%
Operations	8%	12%
Finance	4%	3%
Legal	1%	N/A
Human Resources	1%	1%

The doubling in the percentage of IT respondents is startling – but is an indication that conferencing technologies are fast becoming a core strategic asset of most organizations. While in 2002 individual departments – sales, marketing, engineering – were responsible for their own purchases (and tracking) of conferencing technologies, in 2004 this has migrated to central purchases (and tracking) by IT departments.

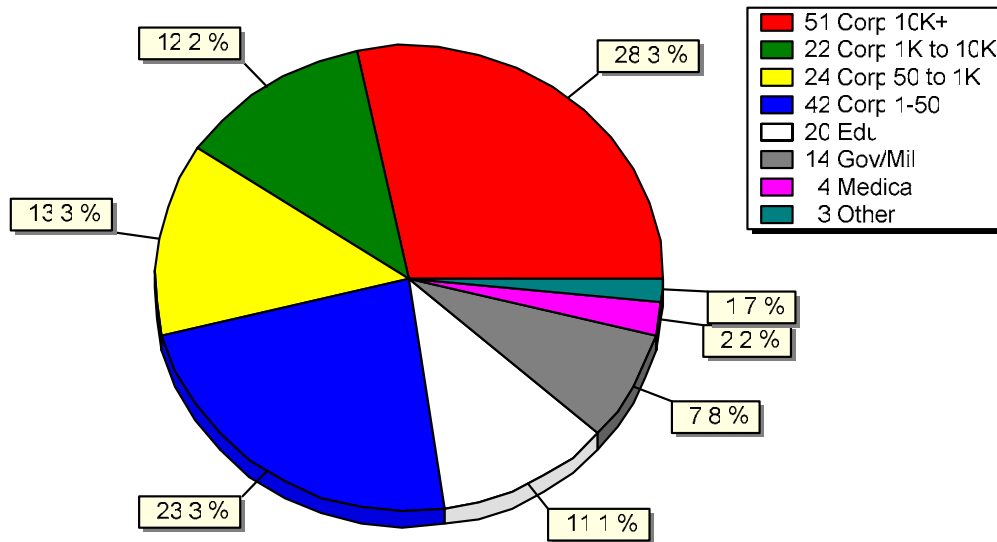
12) Which best describes your job title?



	2002	2004
CEO	8%	9%
CIO	1%	1%
CFO	1%	1%
VP	12%	10%
Director	16%	10%
Manager	37%	37%
Coordinator	5%	12%
Assistant	2%	2%
Other	19%	19%

Other than a trade-off between Directors and Coordinators, the respondent's job titles are nearly identical to the 2002 respondents (perhaps related to directors of individual departments vs coordinators in IT departments ...).

13) Which category best describes your organization?



	2002	2004
Corporation 10k+	25%	28%
Corporation 1-10k	18%	12%
Corporation 50 -1,000	18%	13%
Corporation 1-50	26%	23%
EDU	5%	11%
GOV	3%	8%
Medical	1%	2%
Other	4%	2%

Most of the respondents were from commercial organizations. There was a slight shift from commercial to education/government respondents between 2002 and 2004.

<end of report>