WAINHOUSE Research

Understanding the Huddle Room

Maximizing the Value of these Underutilized Spaces

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Introduction

For 15+ years, Wainhouse Research (WR) has provided strategic advisory and consulting services to large and small enterprises around the world. And in many cases, those projects have included a detailed review and assessment of the customer's meeting room environment.

While each project has a different scope and ultimate goal, we have noted several themes that are common across many of our end-user customers. One of the most apparent themes is a layer of confusion around the strategic importance and value of the smaller meeting rooms (a.k.a. "huddle rooms") within the customer's environment.

WR believes that huddle rooms should be an integral part of every organizations meeting room and collaboration strategy for several reasons including:

- the addition of millennials to the work environment
- the enhanced interest (and in some cases use) of open work spaces and telecommuting
- the increased need to support large numbers of collaborative and distributed work teams

But most companies remain stymied about how to deal with these spaces. This study, sponsored by Polycom, is intended to raise awareness of the value and importance of these misunderstood, mismanaged, and often under-appreciated meeting spaces.

What is a Huddle Room

A "huddle room" is a meeting room that due to its size or layout can accommodate only a small number (typically 6 or less) of attendees. Seems simple enough. So why are these small spaces such a source of confusion for AV and VC professionals?

The definition of a huddle room is fuzzy in many dimensions. For example, in the past two years we've stumbled across definitions of a huddle room that include:

- Intended use (e.g. small rooms intended for collaboration, presenting, and problem solving)
- AV capabilities (e.g. small rooms with flat panel displays and wireless presentation capabilities)
- Availability (e.g. small rooms available for ad-hoc meetings without having to schedule the spaces)
- Target Audience (e.g. small rooms designed to support companies using open work environments)
- Use cases (e.g. small rooms intended to host short meetings or HR interviews)
- Location (e.g. small rooms located in branch offices or in larger facilities / campuses)
- Usability (e.g. small rooms designed to focus on simplicity and ease of use)
- Support requirements (e.g. small rooms designed to be operated by users without support staff)

To be clear, WR does not dispute that depending on the organization, location, situation, etc., the above characteristics may or may not apply to that company's huddle rooms. However, we see no justification for including these items in the actual definition of a huddle room (other than vendor-efforts to more-closely associate products or services with these types of meeting spaces).

For example, defining that huddle rooms should be operated without IT support reinforces the already solid business case for centralized room monitoring and management systems, but does not specifically help define a huddle room.

It is important to understand that huddle rooms may look and feel very different from standard meeting rooms. Some huddle rooms may have sofas instead of chairs. Others may have a higher table with bar-stool seating. Some may have only white boards all around the space.

Huddle rooms are just as the name implies – small meeting rooms where people can huddle[1]. And a small meeting room is a huddle room whether it includes any audio-visual equipment or not, is used for quick chats or long discussions, or is available for ad-hoc use or must be scheduled.

Are Huddle Rooms a New Concept?

Despite the recently flurry of press coverage and market hype, the huddle room concept is far from new. These small meeting rooms have existed for decades in small, medium, and large organizations. These rooms, however, have been largely ignored or relegated to the status of, "that little room around the corner" for several reasons including:

- Large meeting rooms with fancy furniture and integrated audio and video are much sexier, and having a meeting in such a room lends an air of importance or formality to the discussion. Huddle rooms are neither sexy nor formal.

- Large meeting rooms are usually the result of careful space planning to ensure ample meeting space for workers in those physical areas. Huddle rooms, at least in the past, were usually an afterthought and a way to use the space left over after all other areas (offices, cubicles, storage spaces, large meeting rooms, etc.) have been defined.

- Large meeting rooms are scarce, high demand resources, and for this reason are usually actively managed by the AV / IT team, local receptionists, or others. Huddle rooms are less scarce, and often not managed at all. Many companies don't even have a centralized list of huddle rooms.

- Large meeting rooms often include expensive AV equipment, and thus are considered AV / IT / facilities assets for the company. Huddle rooms today include little if any technology, and therefore are not of significant interest from a technology asset management perspective.

- Adding AV capabilities to huddle room was believed to be expensive and overly complex.

- The belief (valid or not) that the collaboration experience that could be provided within a smaller room would be unacceptable to the users.

The net of the above is that huddle rooms have always been a part of the workspace … but until recently they were simply taken for granted.

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[1] According to thefreedictionary.com, a huddle is "a small private conference or meeting."

How Many Huddle Rooms Exist Today?

This is a common question posed to the WR visual collaboration / audio visual research team.

In full disclosure, it is impossible to provide an exact count of the huddle rooms around the world. Unlike products or services provided by a discrete number of vendors, huddle rooms are built by organizations themselves (or by their contractors).

In addition, there is no "countable" defining characteristic or requirements for huddle rooms that we can use to calculate the total number of rooms. For example, there is no legal or safety requirement forcing organizations to register their huddle rooms. If each huddle room needed a "huddle room license" or a "huddle room box", we could count licenses or unit shipments. That is not the case here.

Thus the only way to accurately count the number of huddle rooms would be to collect data from millions of companies around the world.[2] And then, of course, we'd have to deal with the current confusion regarding the definition of a huddle room and the fact that many huddle rooms operate "off the grid" meaning that they are not centrally managed or treated as tracked assets.

The net is that even if we could query the proper people at millions of companies around the world, the validity of the data would be marginal at best.

Estimating the Number of Huddle Rooms around the World

For the reasons above, WR has taken an alternative approach to estimating the total number of huddle rooms in the field.

After more than 15 years of tracking the group video conferencing market on a global basis, and years of in-depth research into enterprise trends regarding product usage and lifespan, we estimate that there are ~ 1.5 – 2 million group video conferencing rooms in use in the world today.

Based on countless discussions with end-user conferencing and AV managers and years of strategic consulting projects with large organizations, we estimate that on a global basis there are approximately 20 – 25 huddle rooms for every group video room.

Based on the above, WR estimates the total number of huddle rooms around the world to be between 30 and 50 million.

The chart below highlights WR's estimate of the total number of meeting rooms, including immersive (telepresence) suites, boardrooms, large meeting rooms, and huddle rooms, around the world.

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[2] According to Manta.com, there are more than 30 million companies in just the United States.
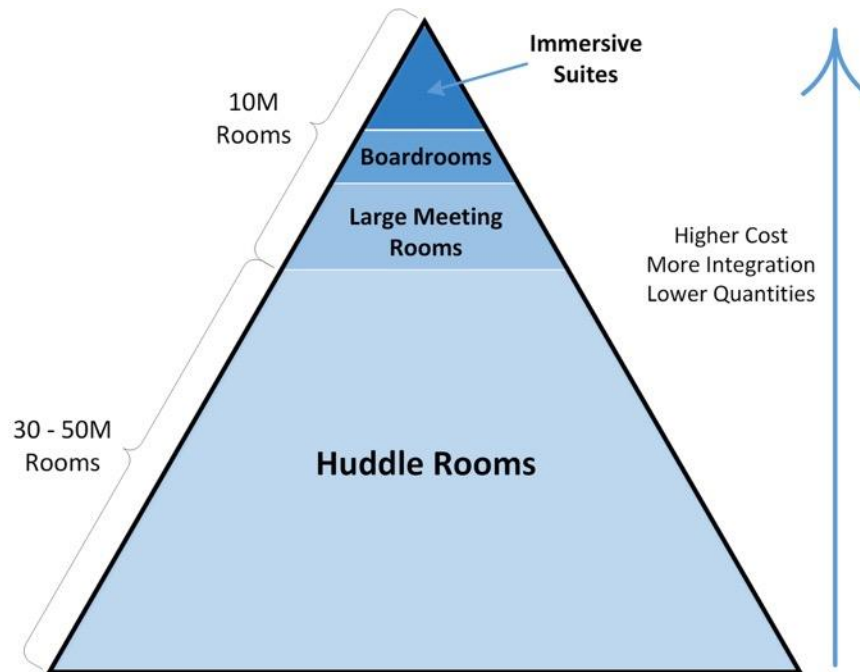
Important Notes:

1) Depending on the end-user organization and how it does business, the ratio of huddle rooms to group video rooms might range from 1:1 to 50:1 or more (assuming, of course, that the organization has any group video rooms at all).

2) Some portion of the ~ 1.5 – 2 million group video rooms in use today would be classified as huddle rooms. However, WR does not believe this materially impacts our estimate of the total number of huddle rooms in the field today.

What's in the 30 – 50M Huddle Rooms?

Once again, it is impossible to provide statistically accurate data on the audio-visual equipment installed in the typical huddle room today. However, our research and experience working with enterprises indicates that the vast majority of huddle rooms have little or no technology in place today.

Specifically …

- The typical huddle room has only basic furniture (a small table, a few chairs) and perhaps a speakerphone or PBX phone on the table.

- In some cases, these might also be equipped with a standard dry erase or flip chart.

- A small percentage of huddle rooms include a flat panel display mounted on the wall and a VGA / HDMI cable (or connection plate) to allow users to present from their notebooks.

- A well-equipped huddle room with a flat panel display might also include a wireless presentation system to allow users to present from their notebooks or mobile devices (review WR's [coverage of wireless presentation systems](#) for more information about these solutions).

- An "advanced" huddle room might support integrated audio conferencing and even video conferencing (either using a stand-alone video conferencing system or USB audio / video devices that connect to a user's notebook PC).

We should also consider what is NOT in the typical huddle room such as:

- An AV equipment rack
- An AV control system
- Ceiling speakers
- Table microphones
- Acoustic treatments on the walls
- Controllable / dimmable lighting
- Motorized drapes and/or blinds

Most huddle rooms are basic meeting rooms that were built by the facilities team without any AV-specific enhancements.

What to Expect from Huddle Rooms

End-users have relatively high expectations of the large, well-integrated meeting rooms within their organization. Their companies have made significant investments in these spaces, and often the AV integration project required months or longer to complete. As a result, the users expect a superior, "best of breed" experience when working in those rooms.

Huddle rooms, on the other hand, are all about compromise. Unlike the "best of breed" experience one might expect from larger spaces, organizations should follow the concept of "good enough" for their huddle rooms. Note that good enough does NOT mean unacceptable or unreliable. Good enough also does not mean the room should be uncomfortable, unacceptably loud or dark, or unprofessional. Good enough means that the space and the equipment in the space should be more than adequate for the given task and requirement.

For example, while perfect lighting would be appreciated, good enough lighting is acceptable in a typical huddle room. Similarly, while exceptional audio (no background noise, limited reverb, and great sound reproduction) would be well received, clear and understandable sound quality is good enough.

The design tenets for huddle rooms revolve around the need to support large numbers of rooms, and thus key concerns include low cost (both real-estate and equipment), ease and speed of installation, and ease of use (so support burden is limited).

The Future of Huddle Rooms

Due to the changing nature of the workforce and the workplace, huddle rooms will play an increasingly important role moving forward. And over time, more organizations will recognize the hidden value of their existing smaller meeting spaces. This will be driven by various elements including:

- Increased end-user requests for additional meeting spaces
- Increased adoption of open work spaces and telecommuting
- Ongoing vendor marketing about the value of smaller meeting rooms
- Expanded analyst coverage of small meeting room collaboration solutions

WR expects a new crop of huddle-room-friendly solutions to hit the market in the near future. While existing solutions address some huddle room requirements, WR is aware of numerous solutions soon to be released that will provide advanced collaboration and presentation capabilities, a more than "good enough" quality of experience, with an easy-to-install form factor, at extremely low price points.

Furthermore, WR expects that some huddle room solutions will be available for purchase from AV resellers only, while others will be available for direct purchase (e.g. via Amazon) and designed for installation by the end-user customer.

Summary

For decades, collaboration technology has been limited to larger, integrated, and expensive meeting rooms. But next generation workers, and the need for companies to complete on a global basis, will drive demand for collaboration solutions throughout the organization.

Over the next few years, advanced audio-visual and collaboration products and services will make their way into the millions of existing smaller meeting rooms (a.k.a. huddle rooms). These rooms will provide a "good enough" user experience, coupled with relatively low price points and centralized management and will support the large scale collaboration requirements of tomorrow's enterprises.

The concept of a huddle room, and the way huddle rooms are used will likely vary by organization, location, vertical market, culture, etc. Nevertheless, it is not a matter of IF huddle rooms will play an important part in the collaboration / AV space … it is a matter of WHEN, and to what degree.

About the Authors

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About Wainhouse Research

Wainhouse Research, www.wainhouse.com, is an independent analyst firm that focuses on critical issues in the Unified Communications and Collaboration (UC&C). The company conducts multi-client and custom research studies, consults with end users on key implementation issues, publishes white papers and market statistics, and delivers public and private seminars as well as speaker presentations at industry group meetings.

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