



J.D. POWER



Online Meeting Platform Pulse Survey

TMT Global Business Intelligence

April 10, 2020

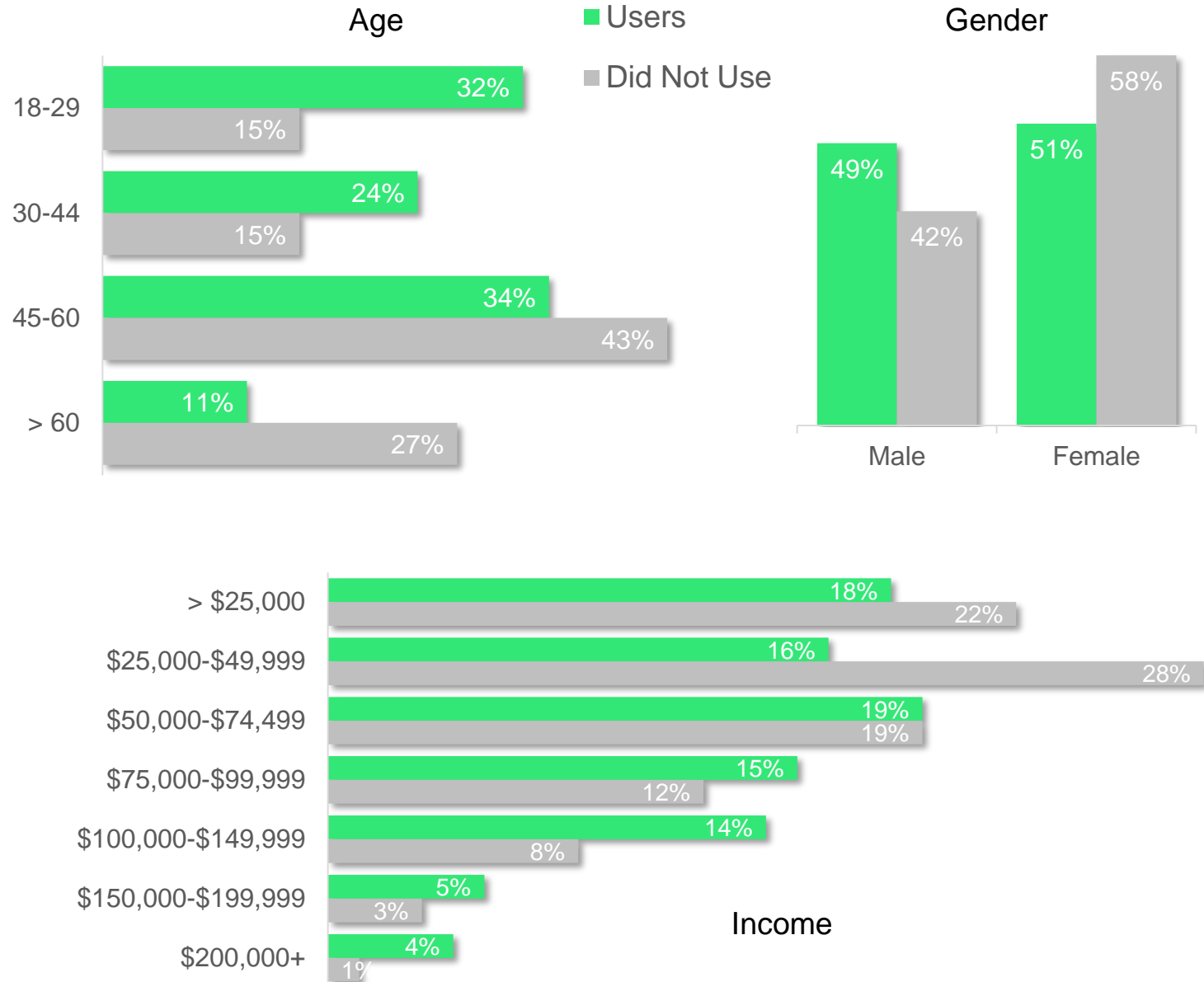
Pulse Survey Methodology

Fielded April 8-9, 2020

3,099 respondents total

73% have used Online Meeting Platform in the past week

Respondents who used an online meeting platform in the past week are younger and more affluent than respondents who did not use an online meeting platform in the past week.



Some percentages add up to 101% due to rounding

Nearly everyone has been impacted by COVID19

Only 4% of respondents say they have not been impacted

43% of respondents have had a change in work conditions and are now working remotely

How have you been personally impacted by the novel coronavirus (COVID-19) outbreak?



Zoom is the most popular online meeting platform

Skype and Google Hangouts/Meet are also popular

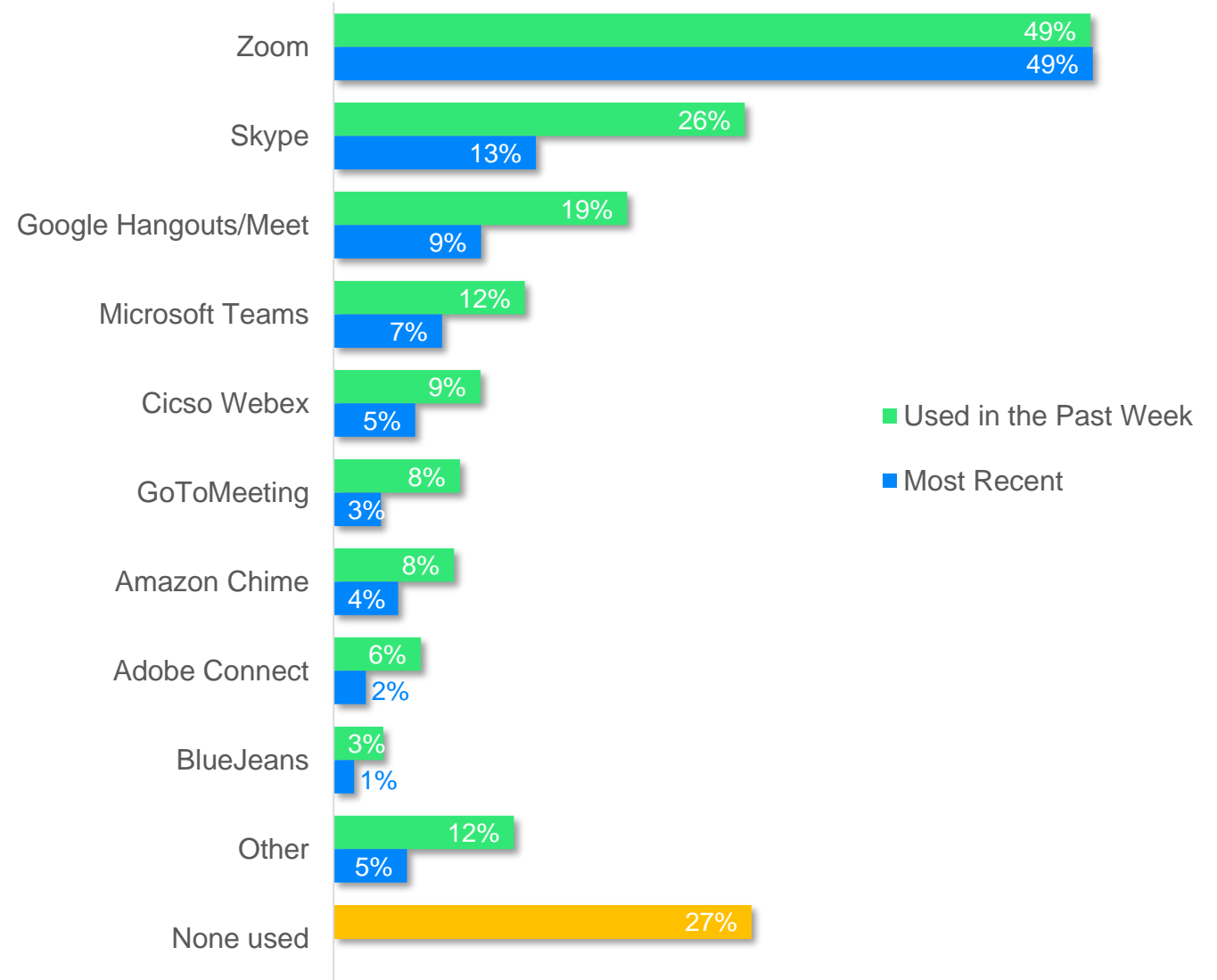


Zoom is the most-frequently used platform during the past week and is the most recently used platform.



Skype and Google Hangouts/Meet also were used by many participants within the past week, but less often as the most-recently used.

Have you used any of these online meeting platforms in the past week? Which did you use most recently?

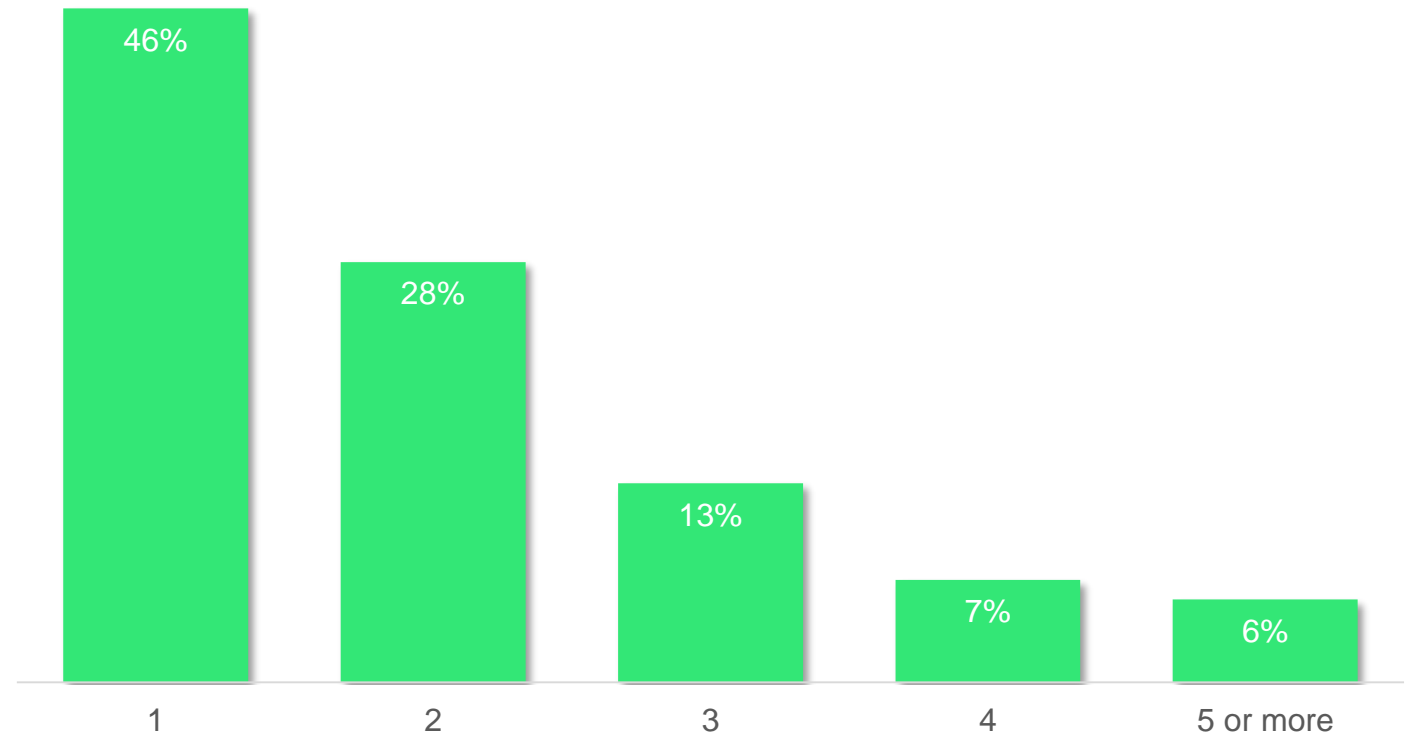


Many respondents used more than one meeting platform

Of respondents who used a platform in the past week, 54% used more than one.

More than one-quarter (26%) used three or more different online meeting platforms in the past week

of Different Online Meeting Platforms Used in the Past Week

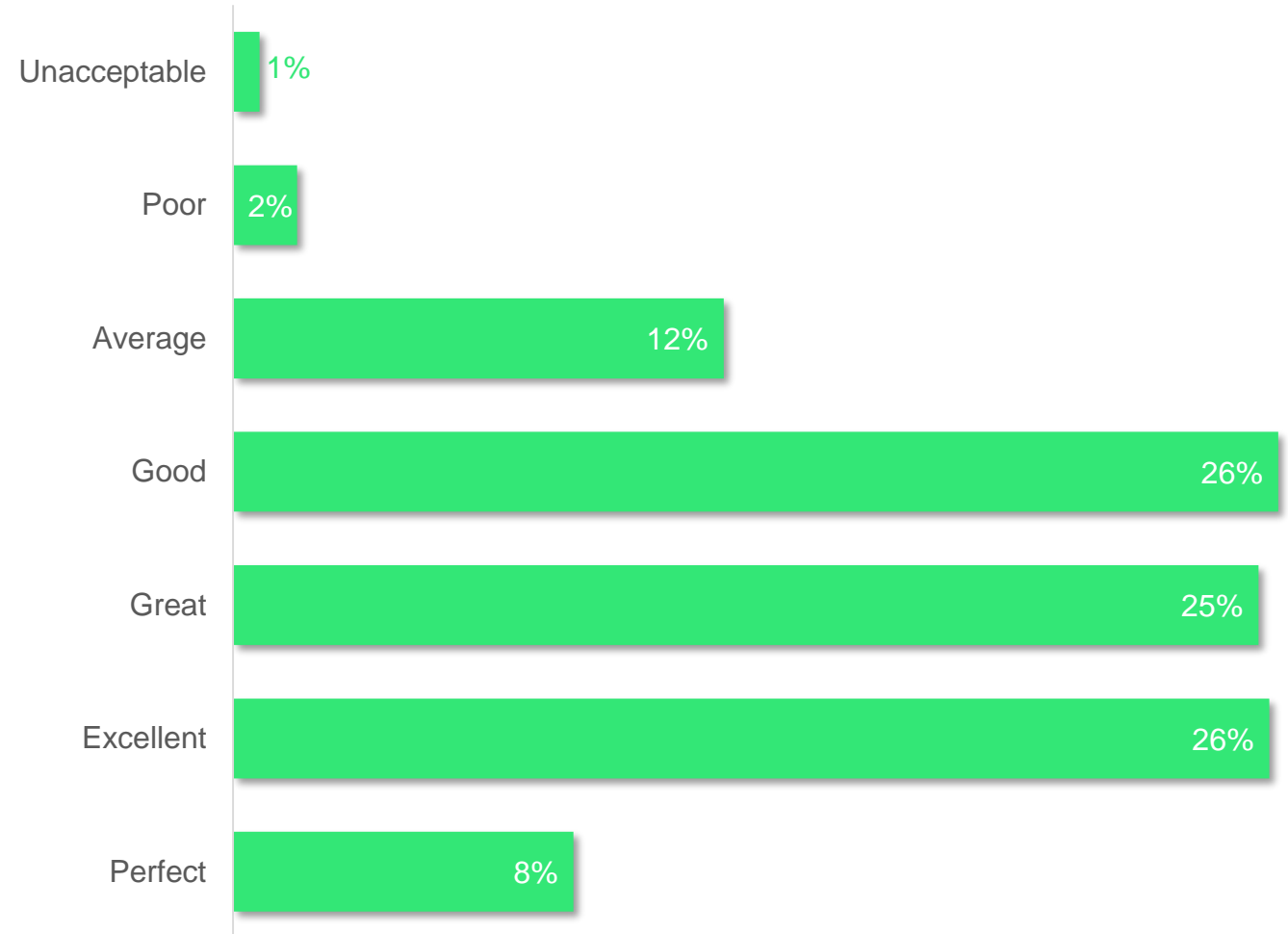


34% rate online meeting platforms as Excellent or Perfect

Only 3% rate online meeting platforms as Poor or Unacceptable

Most respondents (51%) rate online meeting platforms as Good or Great.

Overall, how would you rate the online meeting platform?
(7-point scale)



Business meetings score higher than personal meetings

Different online meeting platforms are used for business versus personal reasons

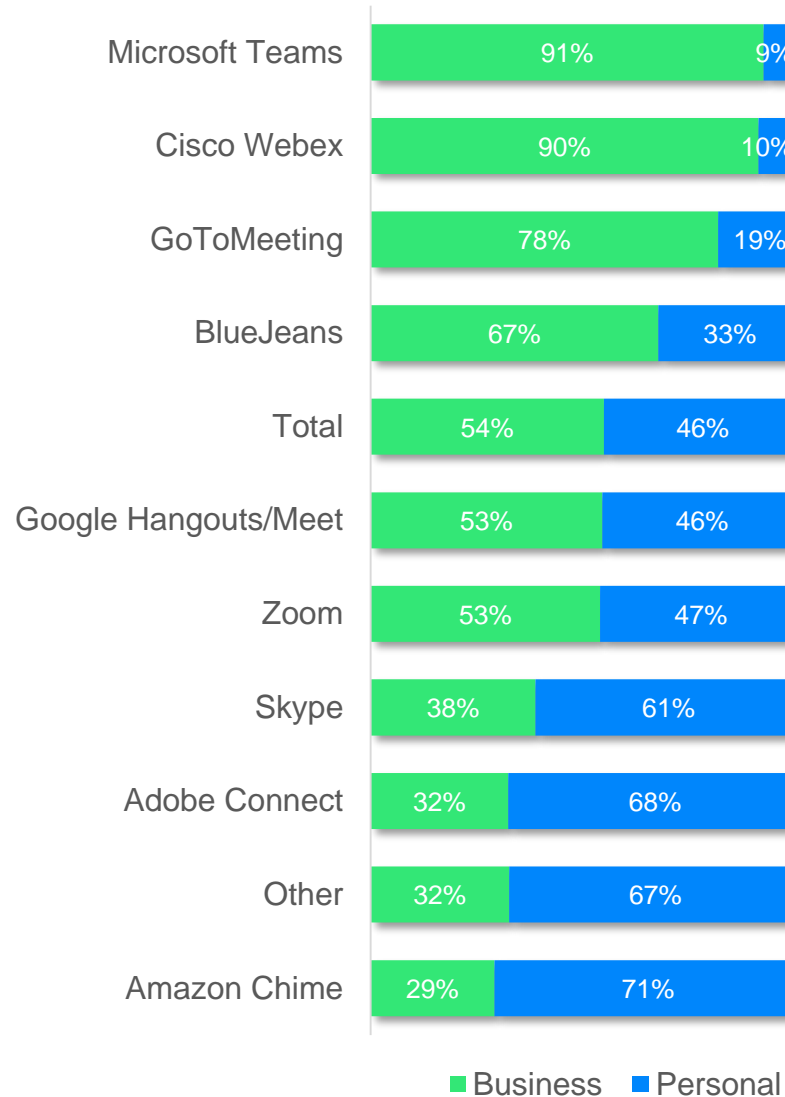


Microsoft Teams, Cisco Webex, and GoToMeeting are more business oriented, while other platforms have a more balanced participation.

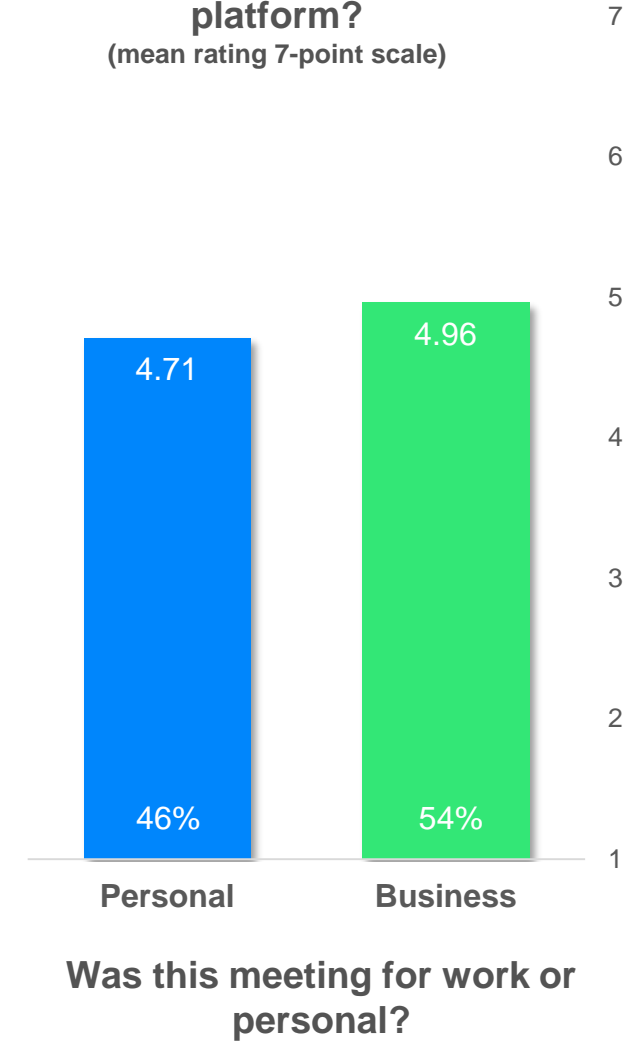
Rating Scale

- 1. Unacceptable
- 2. Poor
- 3. Average
- 4. Good
- 5. Great
- 6. Excellent
- 7. Perfect

Was this online meeting for work or personal reasons?



Overall, how would you rate the online meeting platform? (mean rating 7-point scale)



Was this meeting for work or personal?

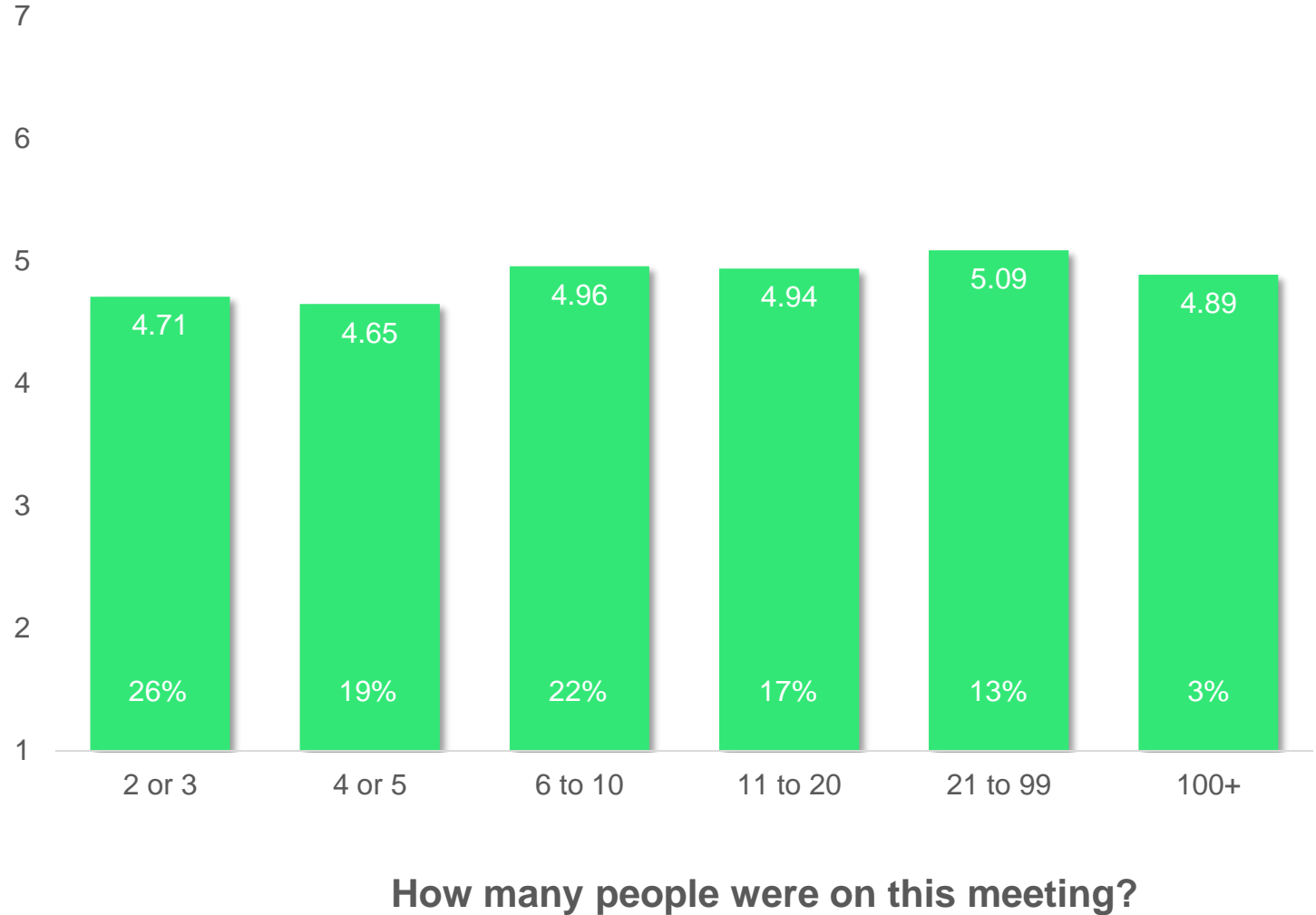
Small meetings rate lower than larger meetings

Meetings with 6-99 participants rate highest

41% of personal meetings include 6 or more people. 68% of business meetings include 6 or more people.

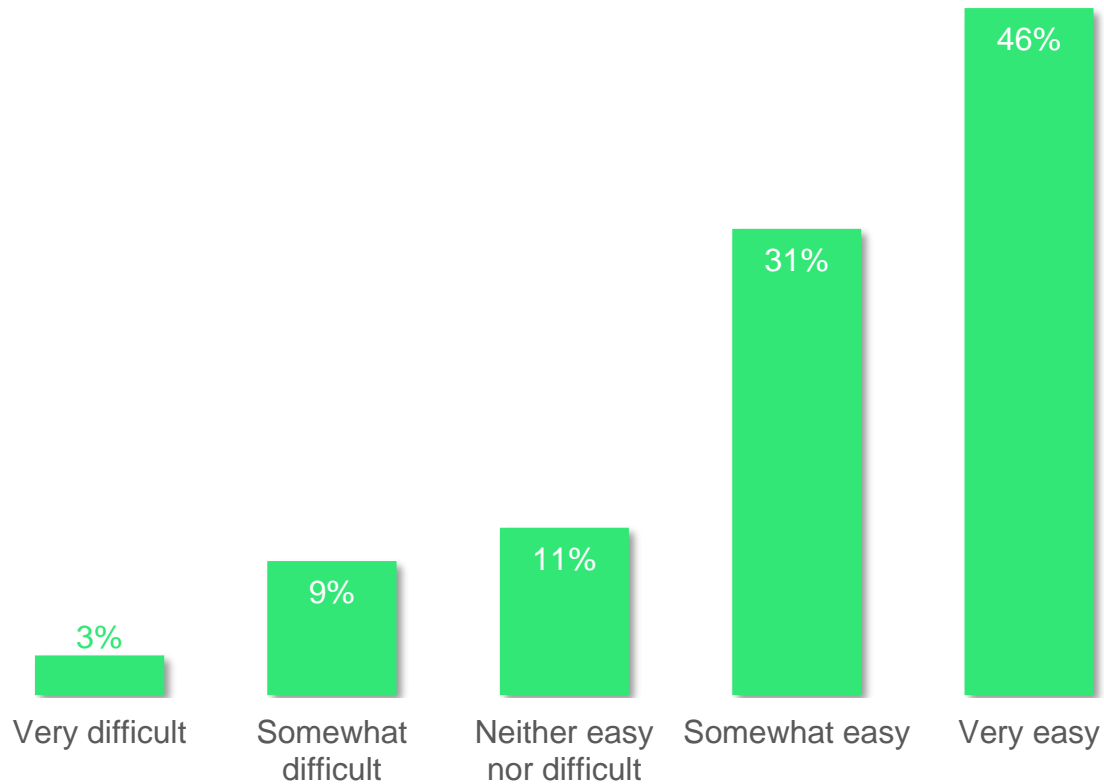
- Rating Scale**
- 1. Unacceptable
 - 2. Poor
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 - 4. Good
 - 5. Great
 - 6. Excellent
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Overall, how would you rate the online meeting platform?
(mean rating 7-point scale)

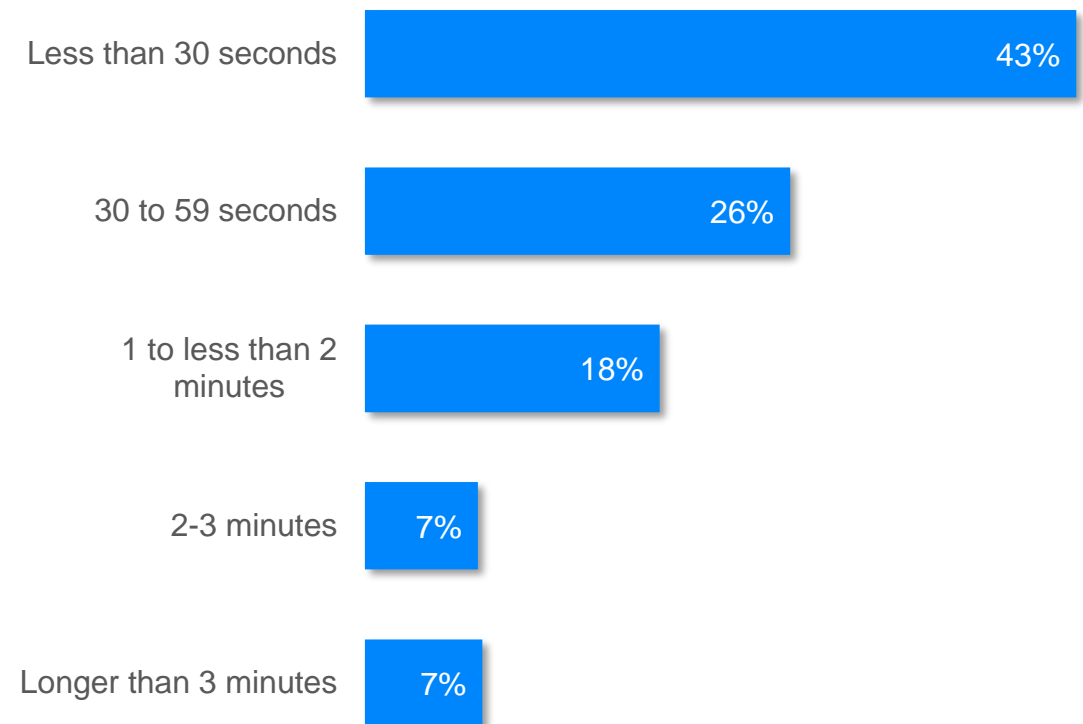


Most participants said it was *Somewhat* or *Very Easy* to connect to the meeting. Most connections took less than one minute.

How easy was it to connect to the meeting?



How long did it take for you to connect to the meeting?



Percentages add up to 101% due to rounding

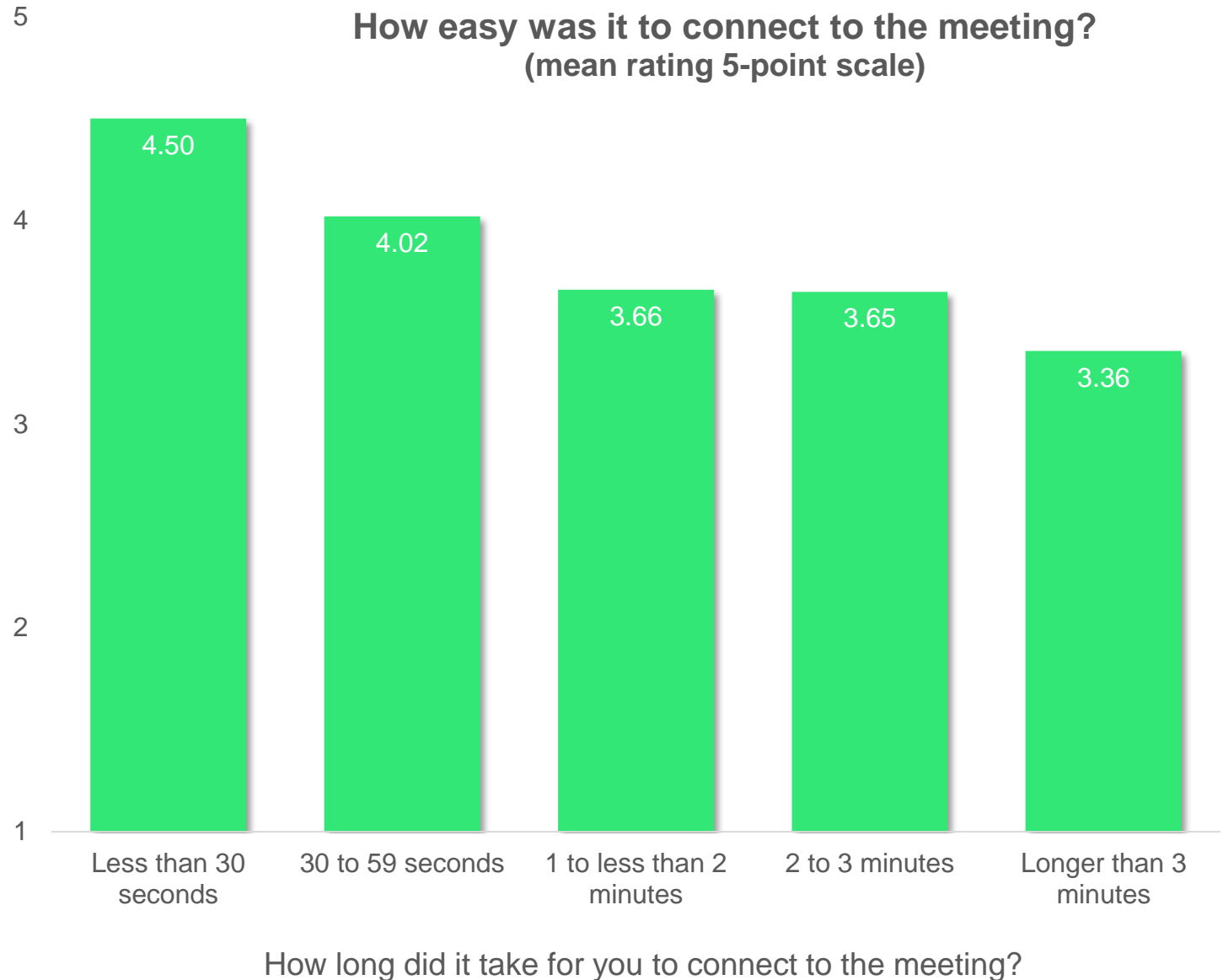
Fast connections improve *Ease of Connecting* ratings

Connection times under 30 seconds rate highest, by far, in ease of connecting

Connection times longer than one minute make joining difficult.

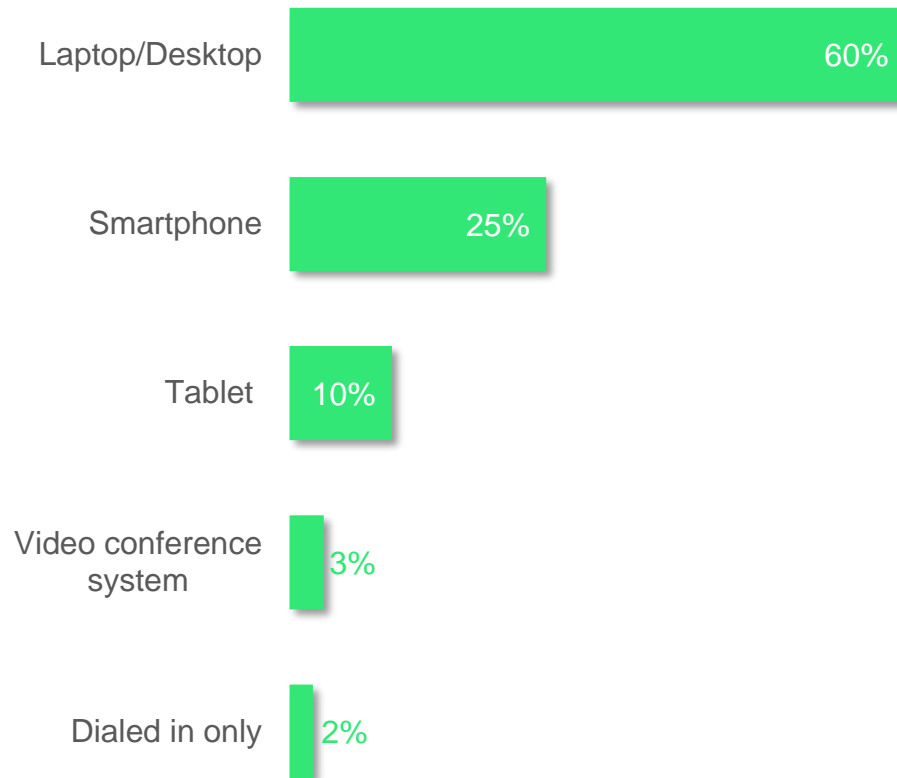
Rating Scale

- 1. Very difficult
- 2. Somewhat difficult
- 3. Neither easy nor difficult
- 4. Somewhat easy
- 5. Very easy

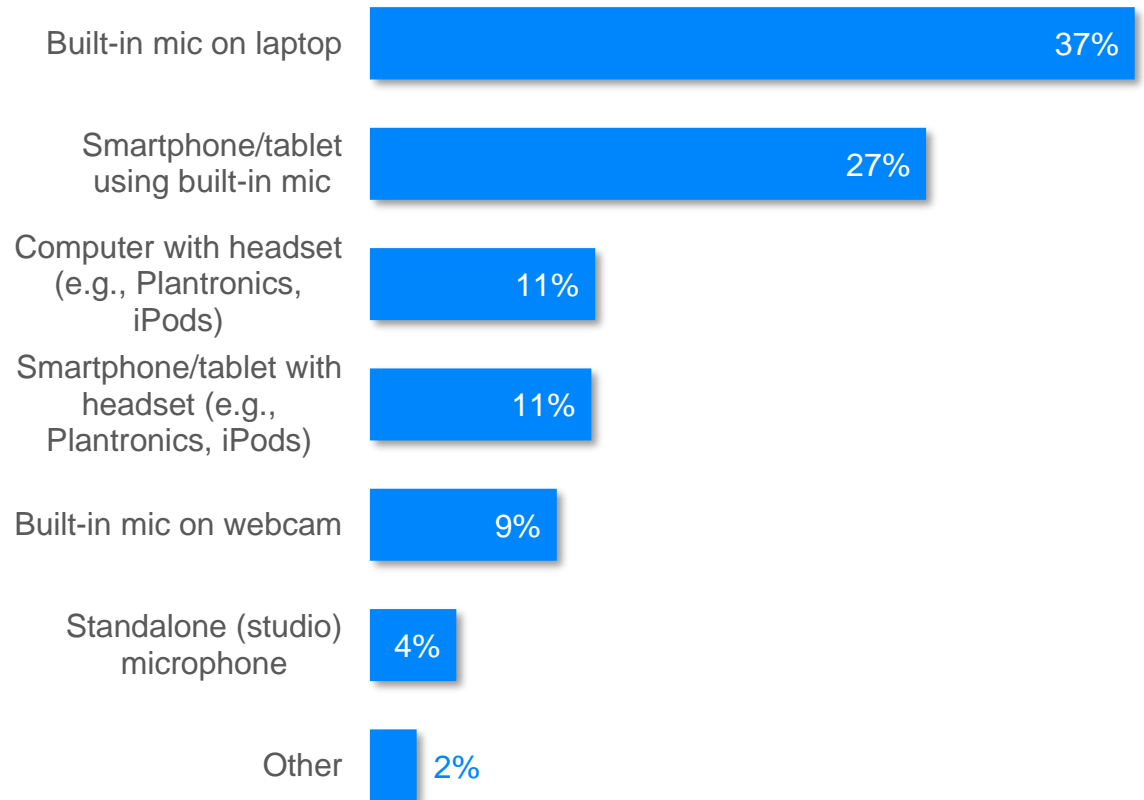


Most meeting participants use their laptop/desktop to join the meeting with the built-in microphone for audio

How did you connect to the online meeting?



How did you connect to the meeting for audio (voice)?



Percentages add up to 101% due to rounding

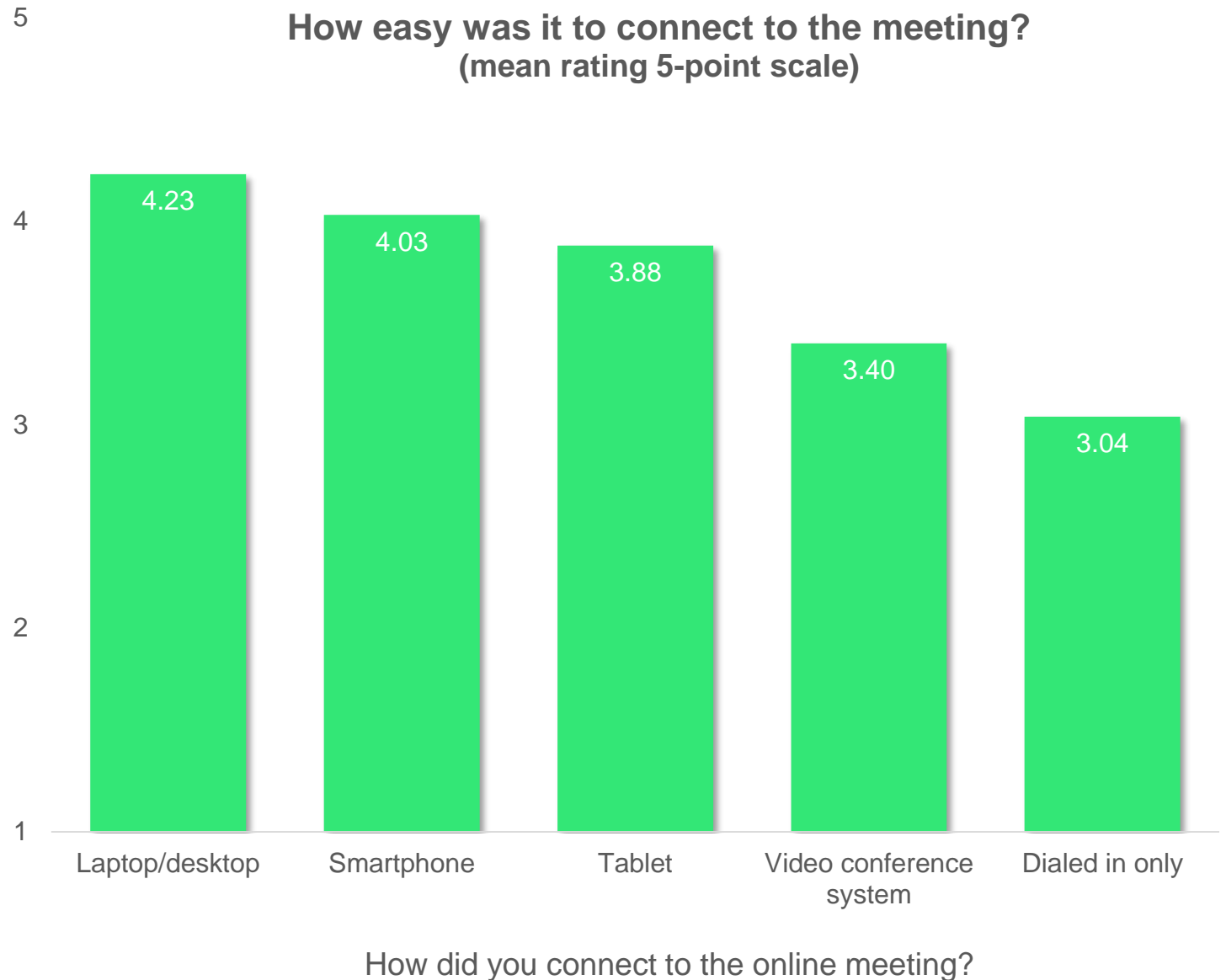
Laptop/desktop are the easiest devices used to join online meetings

Smartphone connections rate high as well.

Dialing-in only (voice only, via phone) is the most difficult way of joining.

Rating Scale

1. Very difficult
2. Somewhat difficult
3. Neither easy nor difficult
4. Somewhat easy
5. Very easy

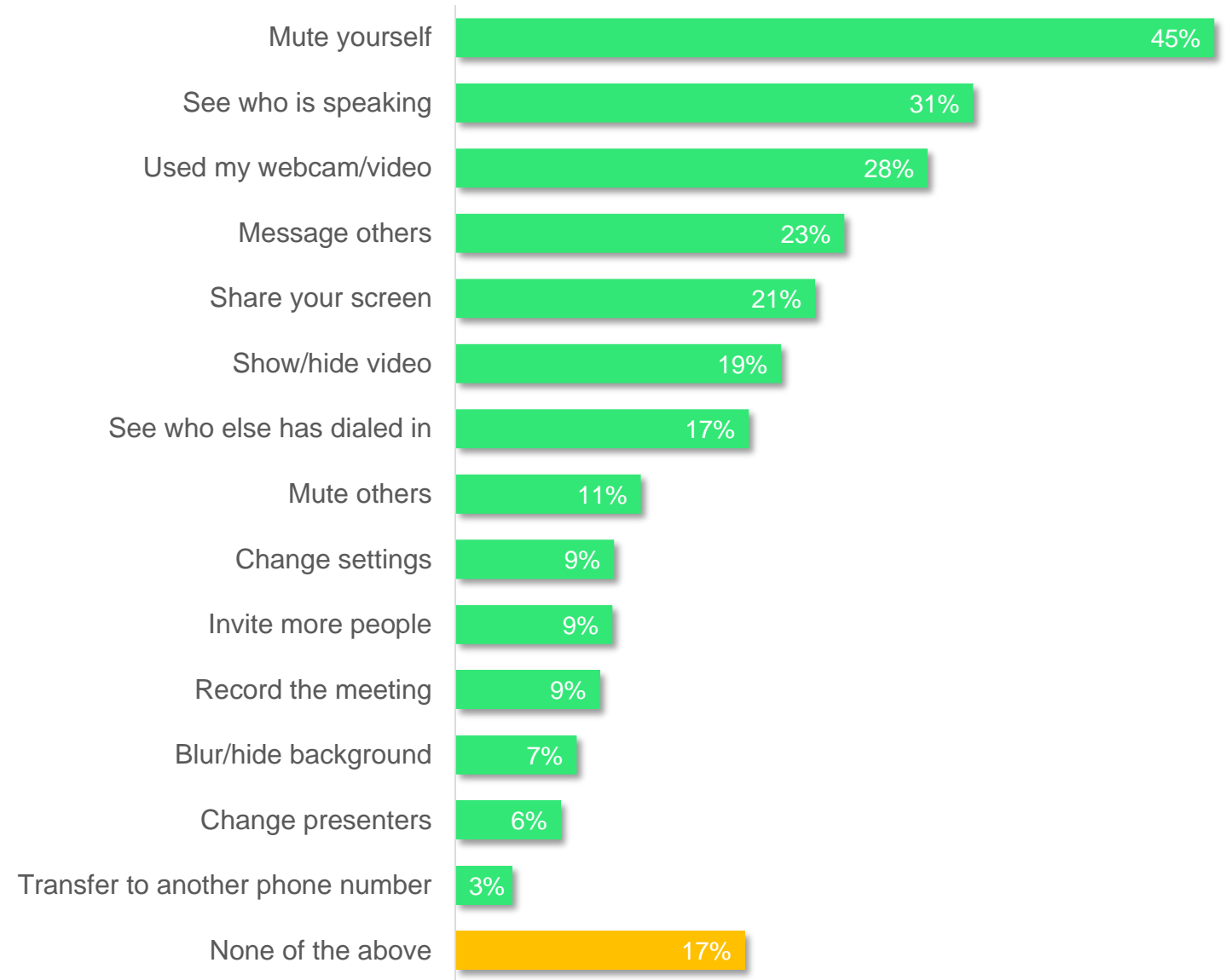


Most participants used at least one feature of the meeting platform

Mute yourself and See who is speaking are the most cited features used

Using my webcam and sharing your screen are also popular features used

Did you use any of the following features during the meeting?



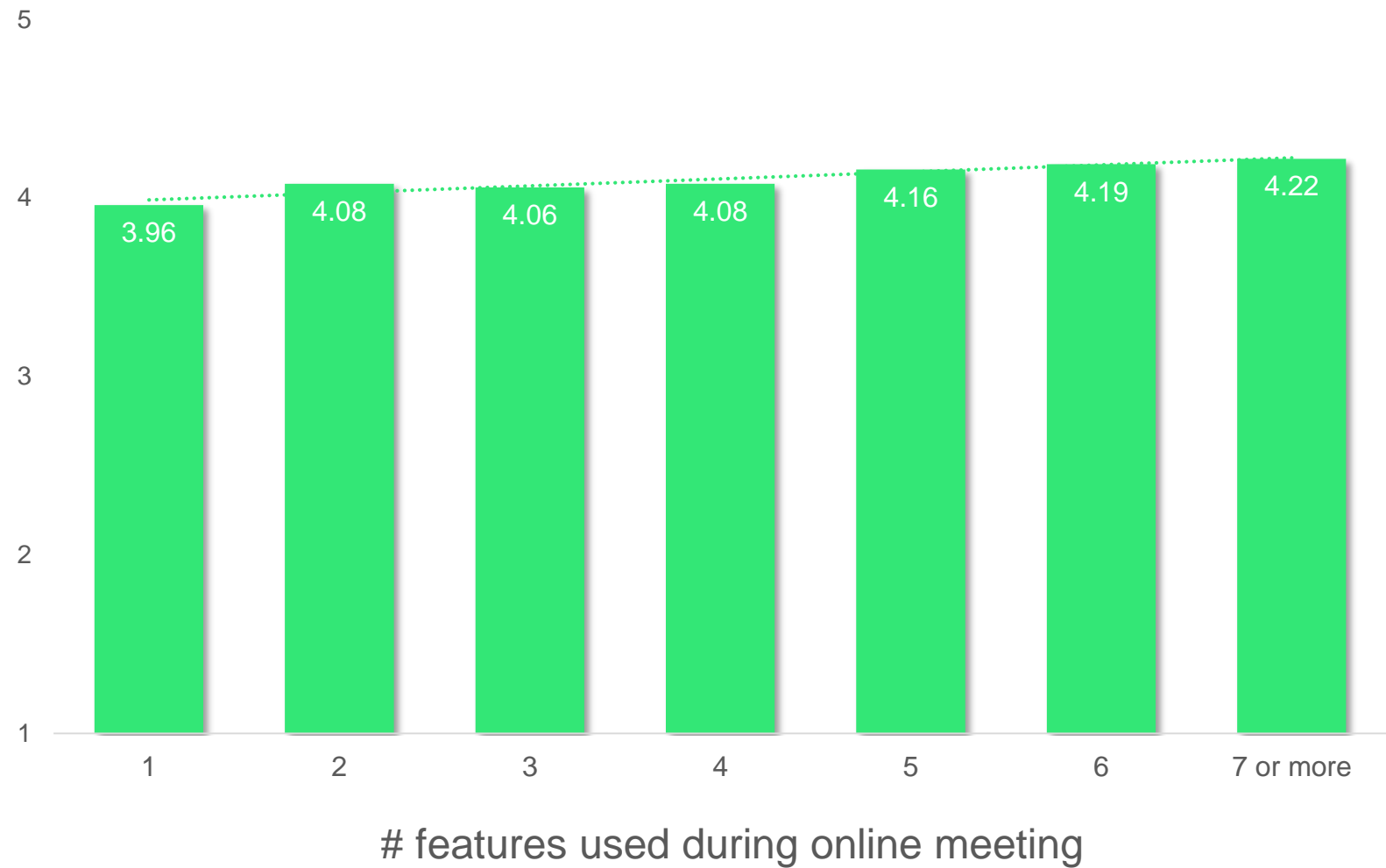
Using multiple features lifts satisfaction

Satisfaction increases as more and more platform features are used during the online meeting

Rating Scale

1. Very difficult
2. Somewhat difficult
3. Neither easy nor difficult
4. Somewhat easy
5. Very easy

How easy was it to use these features during the meeting?
(mean rating 5-point scale)



Mute yourself is the most satisfying feature used

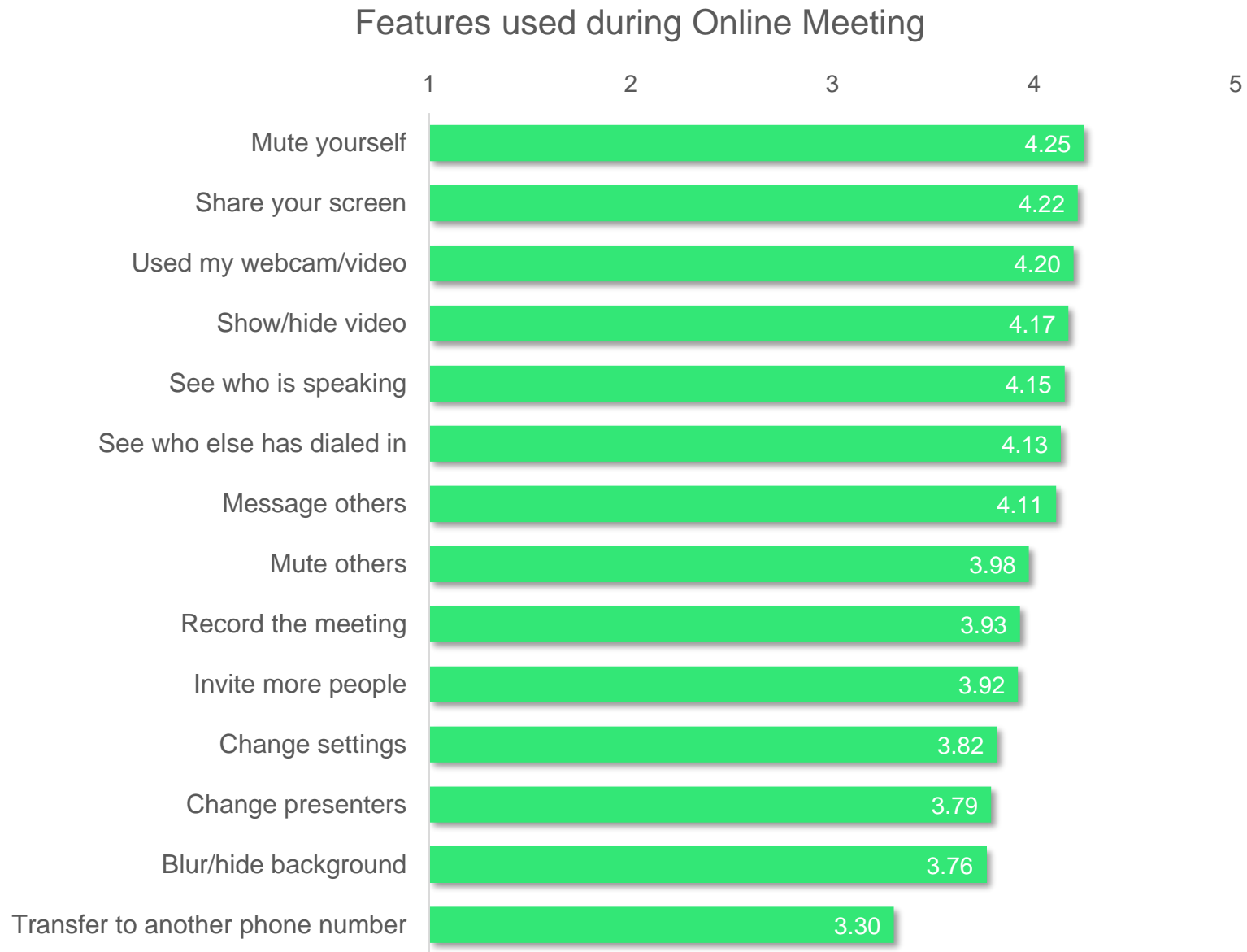
Sharing your screen and using webcam are also satisfying features

Transferring the meeting to another phone is the most dissatisfying feature used

Rating Scale

- 1. Very difficult
- 2. Somewhat difficult
- 3. Neither easy nor difficult
- 4. Somewhat easy
- 5. Very easy

How easy was it to use these features during the meeting? (mean rating 5-point scale)

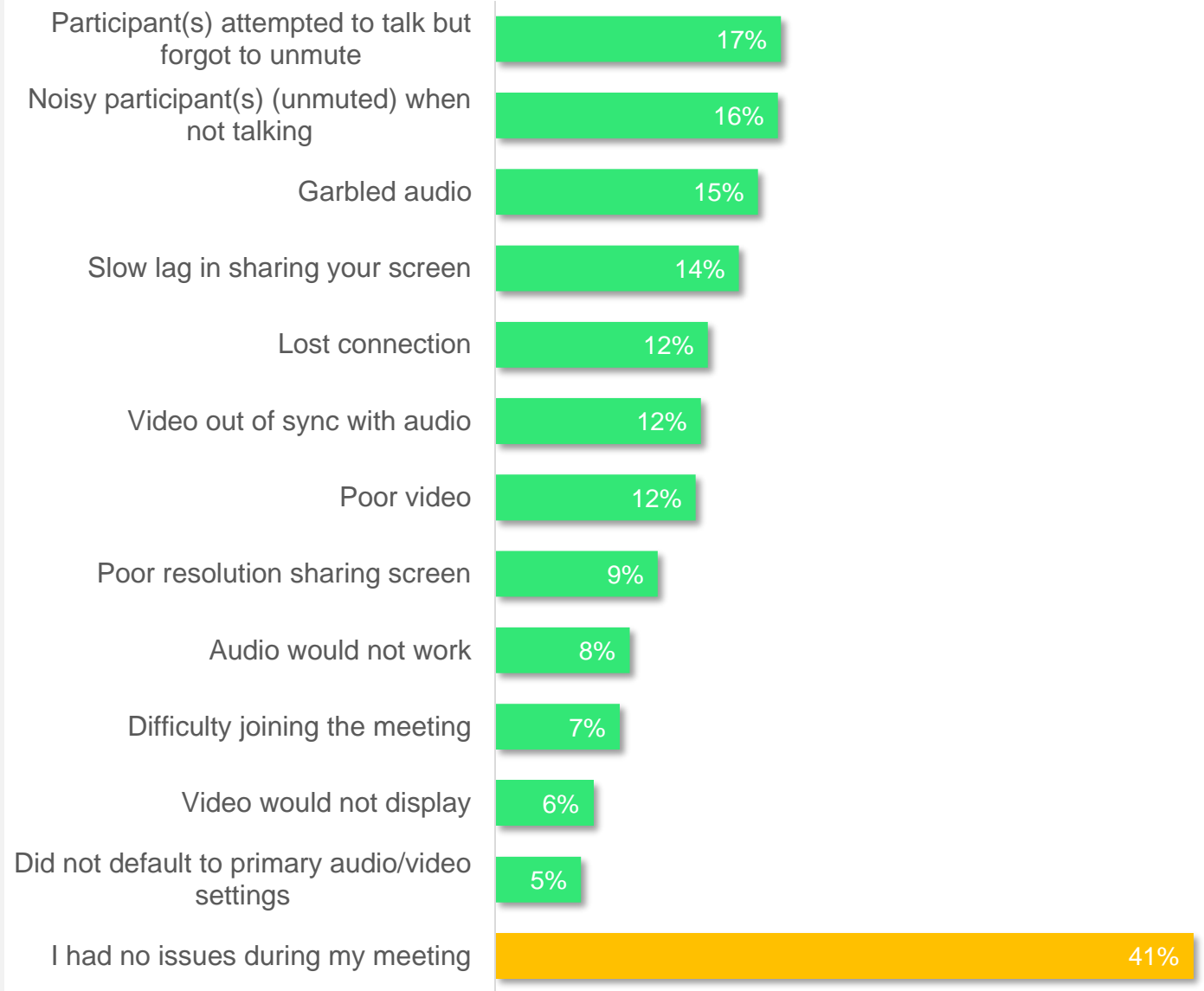


User error tops list of online meeting issues

59% of participants had issues during the online meeting

Garbled audio is the most often stated issue after user error.

Did you experience any of these issues during the meeting?



Online meeting quality issues are a problem

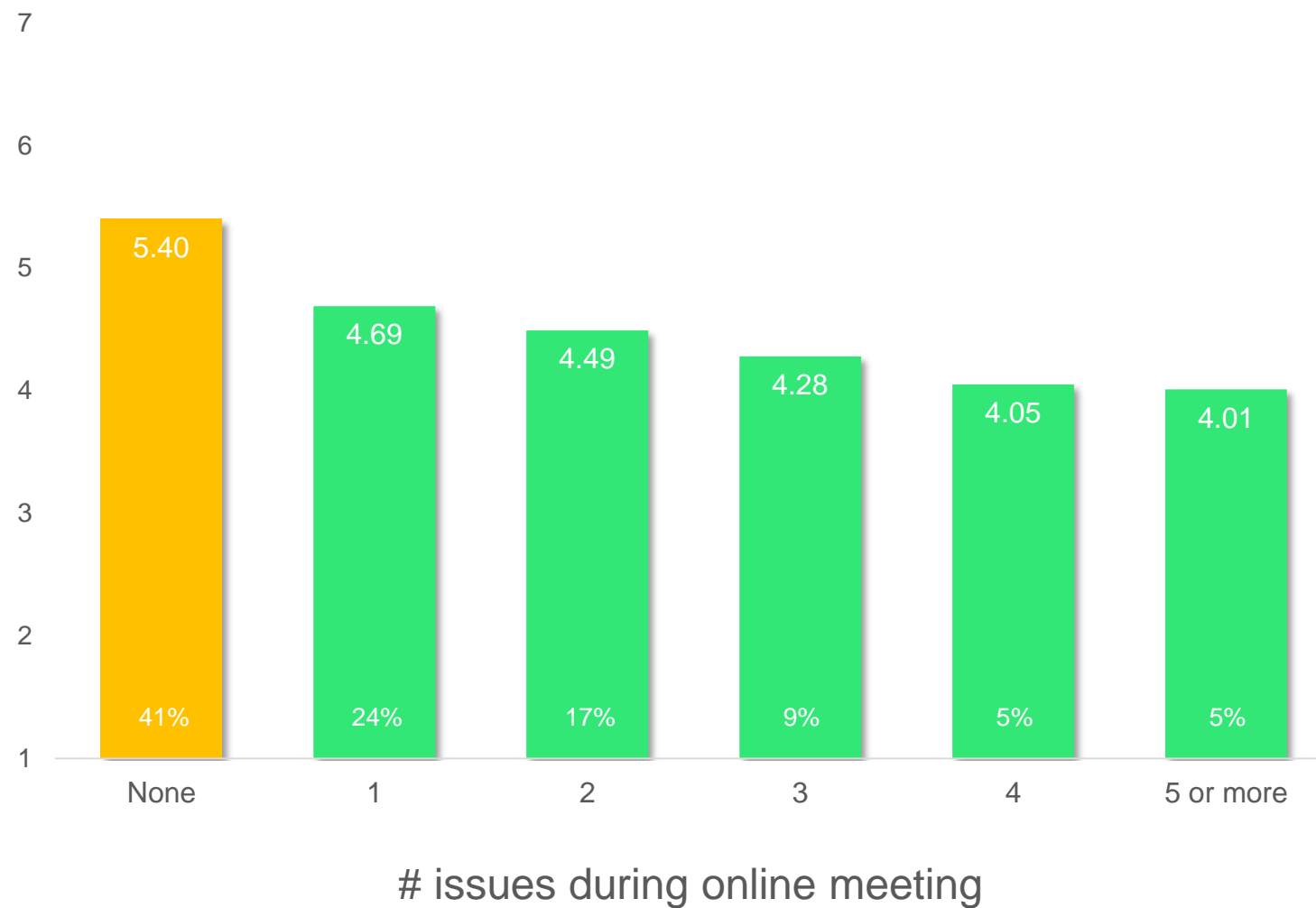
Satisfaction declines substantially even when experiencing just one issue

35% had more than one issue

Rating Scale

- 1. Unacceptable
- 2. Poor
- 3. Average
- 4. Good
- 5. Great
- 6. Excellent
- 7. Perfect

Overall, how would you rate the online meeting platform?
(mean rating 7-point scale)



Percentages add up to 101% due to rounding

Difficulty joining meeting is the most problematic issue

Video issues with poor resolution or video not displaying also create dissatisfaction

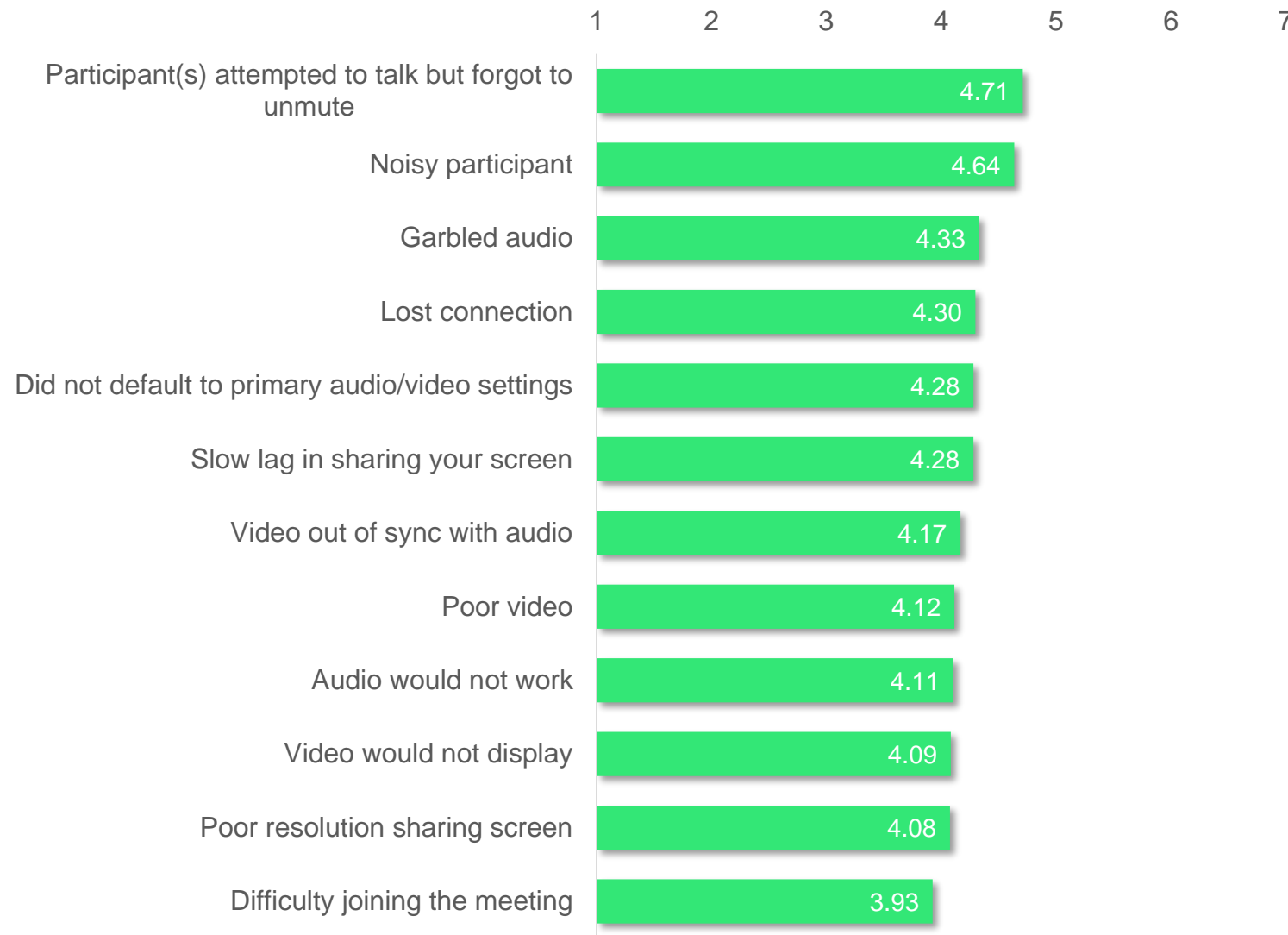
User error from other participants is not as annoying as other issues.

Rating Scale

- 1. Unacceptable
- 2. Poor
- 3. Average
- 4. Good
- 5. Great
- 6. Excellent
- 7. Perfect

Overall, how would you rate the online meeting platform? (mean rating 7-point scale)

Issues Experienced during Online Meeting





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