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SOUND ADVICE: MAXIMIZING HYBRID WORK THROUGH AUDIO QUALITY

Author:

Mick Heys

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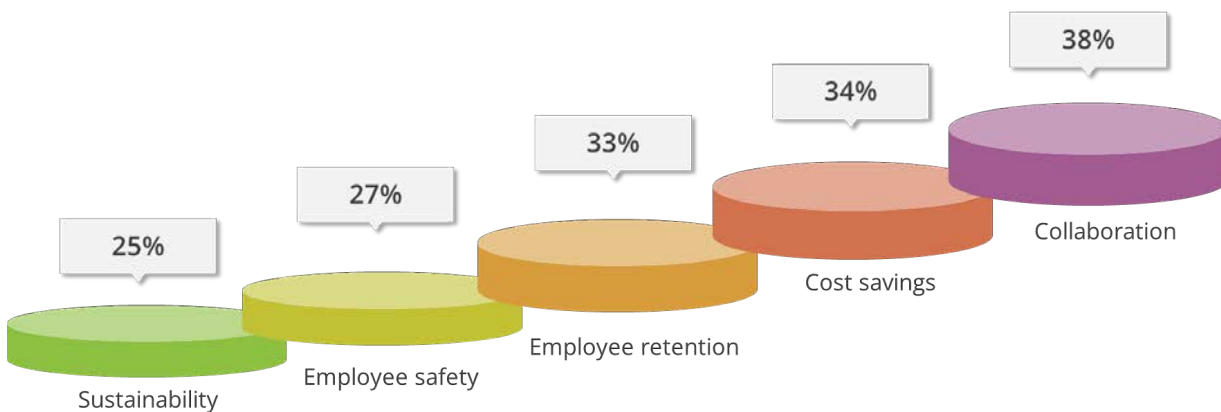
Introduction: Collaboration in a Hybrid World

The term "hybrid" is becoming redundant to describe work. Nowadays, there is general acceptance across most business sectors and geographies that knowledge workers are no longer tied to a physical workplace and can carry out tasks from multiple locations.

This has brought multiple benefits to white-collar workers in terms of flexibility and work-life balance. Organizations have also benefited from this, with IDC's *Future of Work Survey* showing that most companies have noticed an improvement in team productivity when implementing some form of hybrid work. But there's a catch. IDC research also shows that roughly one in three organizations saw the initial improvement in team productivity diminish over time as employees increasingly suffer from digital fatigue and loss of corporate culture. Unsurprisingly, 41% of organizations are now promoting programs and policies to voluntarily bring as many workers back onsite as possible to enhance collaboration and maintain corporate culture.

Acknowledging the importance of the office, companies are realizing they need to take a fresh approach to their workplace strategy and align their work facilities accordingly. Considering the work paradigm shift of the past three years, the workplace has not kept pace. IDC data suggests that many offices designed in pre-pandemic times are not fit for hybrid work.

FIGURE 1
Top 5 Reasons for Office Redesign

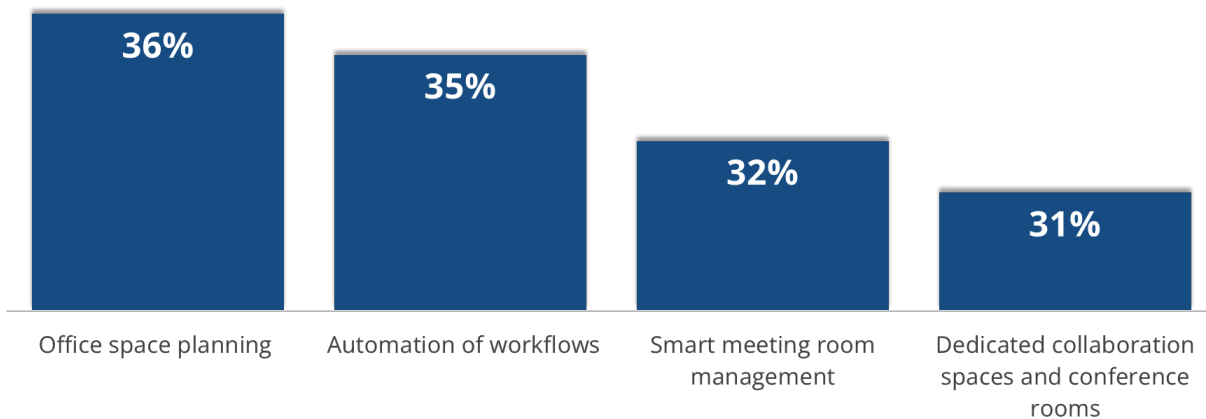


Source: IDC EMEA, Future of Work Survey, March 2022 (n = 506)

According to the latest *IDC Future of Work Survey*, roughly one in three organizations redefined the workplace in 2022. This is expected to continue throughout 2023 and beyond. The main reasons for going to the office have clearly shifted in the past three years, with a much stronger focus on onsite collaboration and training. 38% of organizations said collaboration is a key driver for office redesign, together with cost savings and employee retention.

Office space planning is the most important office tech investment. The whole user journey of employees around the workplace is now being reimagined, placing collaboration at the center. Nearly a third of companies are now focusing on smart meeting room management and dedicated collaboration spaces.

FIGURE 2
Top Office Tech Investments



Source: IDC EMEA, Future of Work Survey, March 2022 (n = 506)

IDC estimates that in Western Europe, more than 70% of employees will work at least one day a week from an office in 2023 (*IDC Return to the Office Forecast*). While organizations are taking steps toward regular use of the office, often with a required number of days per week, this transition phase still presents many challenges.

Firstly, staff resistance. Employee requirements and expectations have shifted in recent years. Driven by trends such as "the great resignation" and "quiet quitting," employees have generally gained more control over their work conditions. While employers are now regaining some of the bargaining power, imposing fixed schedules is often ineffective in getting people back into the office. Some organizations have also opted for isolated "free lunch" initiatives to persuade staff to return to the office on specific week days. Although they may gain some traction in the short term, these initiatives tend to fade off with time.

IDC believes a much more sensible approach is one that focuses on creating a modern and attractive workspace that makes staff naturally gravitate to it, creating a thriving social environment. Ideally, one that enables employees to carry out tasks better than they would do remotely thanks to best-in-class facilities and equipment.

This leads to another important challenge. If collaboration is now at the center of workplace strategy, organizations need to provide the necessary tools to enable the best possible collaboration in the office and facilitate best-in-class interactions between in-office workers and remote employees and customers.

IDC's conversations with large organizations as part of its Best-in-Class Workplace Framework have shown that hybrid meetings are a normal part of business — with some onsite attendees and some attending remotely. IDC research clearly shows that the equipment used in most

companies is not optimal. Team members often struggle to achieve a satisfying conversation flow that enables all members to equally contribute to discussions. Remote attendees rarely lead discussions, and are often sidelined and do not contribute fully. This can lead to delayed decision making and ultimately a loss of productivity. This is supported by ongoing IDC research that shows that the least satisfactory type of hybrid meetings are for problem solving or decision making.

The current challenges with hybrid meetings and the greater importance being given to hybrid collaboration are increasing the demand for tools that ensure meeting equity and that ultimately improve productivity.

Considering that 44% of employees are not satisfied with their communication equipment for teamwork (source: IDC EMEA, *Future of Work Survey*, March 2022), IDC sees an important business case for investments in workplace communication and collaboration technology.

The Importance of Audio Quality in Meetings

Audio quality is often not the major concern when specifying products and solutions for hybrid meetings. Research shows, however, that audio quality has a major effect on individual and group productivity. Interestingly, there are two aspects to this. People generally recognize that poor audio quality has an impact on their ability to work effectively, but the science shows that they significantly underestimate the importance.

According to research by Eryn J. Newman and Norbert Schwarz, poor audio quality causes listeners to perceive the presenter as less trustworthy, less intelligent, and less likeable. In addition, the content being presented is seen to be less important (*Good Sound, Good Research: How Audio Quality Influences Perceptions of the Research and Researcher*, Science Communication Volume 40, Issue 2). The research also found that the person with the best audio quality was considered to be the meeting's best contributor. In terms of recorded meetings, the conclusion was that "it may be better not to be recorded at all than to accept the adverse consequences of a poor recording."

Low audio quality has been found to cause cumulative stress for listeners during long sessions. It has been speculated that increased cognitive load is the primary cause of this stress. Cognitive load is caused when extraneous factors detrimentally influence communication. In visual media, research has shown that the choice of font or color can increase cognitive load. The research clearly indicates that audio quality is a key factor in cognitive load for listeners.

It is interesting to compare the effect of audio quality to video quality when thinking about hybrid meetings. One study looking at virtual reality found that, in terms of immersion in the scene, high quality audio with 20% video quality got nearly identical ratings to 100% video quality with low quality audio (*On the Relative Importance of Visual and Spatial Audio Rendering on VR Immersion*, Thomas Potter, Zoran Cvetković, and Enzo De Sena, Signal Process, September 30, 2022).

A survey by NTT Data Institute found that only 19% of people said the quality of online meetings improved significantly with better image quality, but the figure for improved audio quality was 81%. These results are perhaps not surprising when we consider that it's possible to have a

hybrid meeting with no video (and indeed this was the norm in the days of teleconferencing) but not without audio.

There are a number of implications here for businesses. Audio quality influences trust and credibility. This is important across all departments, especially for sales. Additionally, the perception of leadership, both internally and externally, has huge implications. Improving audio quality is a good way to ensure the company, its strategies, and its products are presented in the best light. Productivity can suffer if hybrid meetings are not effective. Poor audio quality is related to several issues here — reduced contribution, incorrect perception of content, and hindered overall engagement. There are also implications for employee well-being. As we have seen, poor audio increases stress levels and over time this has a cumulative effect. Stress combined with the productivity issues above will negatively impact employee experience.

Remote employees are already less likely to get promoted, as they miss out on the informal networks and are not as visible to management. Poor audio quality makes this worse by also reducing their ability to contribute.

Employee Experience in Best-in-Class Workplaces

Building a thriving workplace that maximizes collaboration is not only a "nice to have" — a lot more is at stake. As competition for talent increases, staff turnover and retention has been a key challenge in recent years. A recent global study by McKinsey surveyed employees at a global level to better understand the main reasons for more employees quitting their jobs in recent years (*Great Attrition or Great Attraction? The Choice Is Yours*). The study found that employees were far more likely to prioritize relational factors, such as personal connections built at work, whereas employers were more likely to focus on transactional ones (salary and work conditions). Not having a sense of belonging was among the top 3 factors indicated by employees as reasons for leaving (51% of employees at a global level). The design of the workplace and the equipment available can have a major impact in reducing staff turnover.

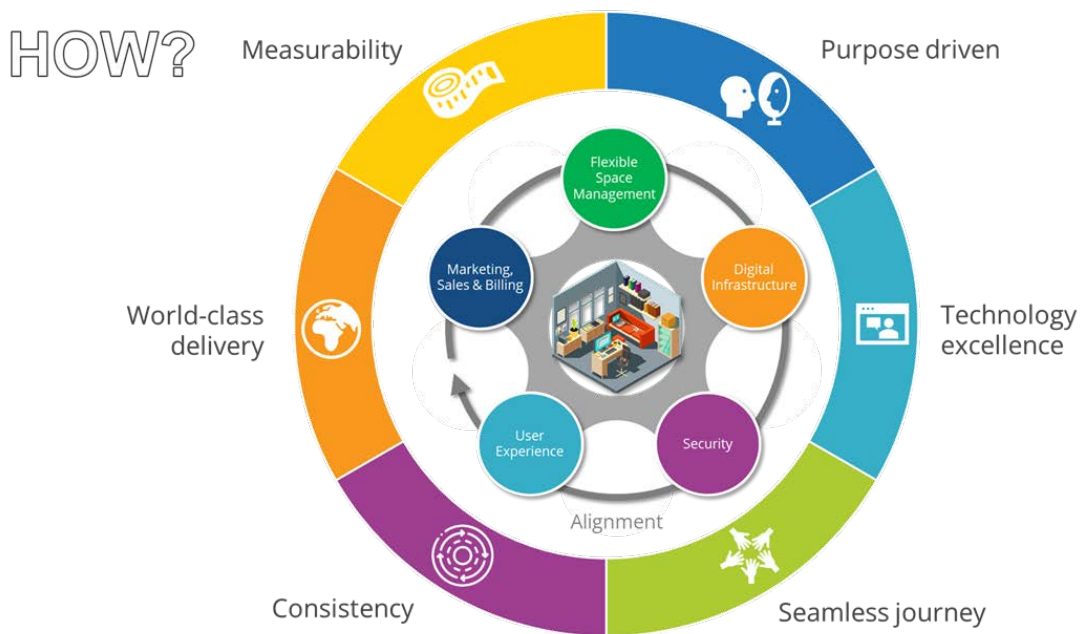
Recent IDC research highlights that nearly 90% of organizations feel that providing a workplace that feels social and creative, with modern work equipment, is important.

Despite the ubiquity of hybrid work and the strong shift toward digital workflows in recent years, physical meetings are still a key element for businesses. Nearly 40% of the EMEA-based companies in IDC's *Future of Work Survey* said the biggest challenge for organizations when supporting hybrid workers is enabling teams to work effectively together.

Most companies interviewed by IDC as part of its Best-in-Class Workplace Framework research also confirmed that office attendance and in-person team meetings lead to faster decision making and lower lead times than with virtual meetings. Therefore, onsite collaboration environments play a vital role in business success. However, as hybrid work continues to be a key requirement of knowledge workers, onsite collaboration needs to seamlessly integrate remote workers. Improving audio quality is a relatively cost-effective way to provide remote participants with higher meeting engagement and enhance their ability to contribute.

IDC's Best-in-Class Workplace Framework (see Figure 3), looking at how leading organizations are going about creating thriving workplaces, identifies endeavors to create a seamless journey for users. Designed with the new hybrid work paradigm in mind, best-in-class workplaces provide future-proof technology to enable seamless transitions between home, office, and on-the-move with mirrored physical and digital environments across all workspaces.

FIGURE 3
IDC's Best-in-Class Workplace Framework



Source: IDC Best-in-Class Workspace Framework, 2022

As staff now mainly go into the office to attend meetings, collaboration environments are more than ever a key part of employee experience (EX). IDC believes they have a major impact on business performance. In IDC's *Future Enterprise Resilience and Spending Survey* (Wave 6, July 2021), 85% of respondents said an improved employee experience and higher employee engagement translate into a better customer experience (CX), higher customer satisfaction, and higher revenues for the organization. 62% said there is a defined causal relationship between EX and CX, and that the impact was "large" or "significant" and measurable.

Given the importance of collaboration for overall employee experience and the impact that audio can have in meetings, reconfiguring collaboration spaces to build the right employee experience is now critical. Failure to do so can impact employee experience, lead to staff burnout, and create missed opportunities. IDC believes that investments to enhance hybrid meetings through audio quality can lead to tangible business outcomes.

Vendor Section: Shure

Shure Inc., headquartered in Niles, Illinois, is a leading manufacturer of audio products for the professional, consumer, and corporate markets. Founded in 1925 by Sidney N. Shure, the company has a long history of innovation in the audio industry.

Shure's product portfolio includes microphones, headphones, wireless systems, and conferencing systems. The company's audio solutions are used in a wide range of applications and environments, including live performances and broadcast events, theaters, recording studios, houses of worship, conference rooms, and lecture halls. It has a global network of distributors and partners, and sells in more than 100 countries. The company has received widespread recognition for its products and services, including awards from the Technical Grammy Awards, the Institute of Electrical and Electronics Engineers (IEEE), and Technical Excellence & Creativity (TEC).

In recent years, Shure has made headway in corporate, education, and government environments, bringing "studio-quality sound" to meeting rooms, training and education spaces, and conference centers. Its conferencing and meeting audio system lineup provides performance-grade audio designed for clear and reliable communication. It offers a range of microphones (including ceiling array, wall mounted, and tabletop, as well as wireless options for presenters) and loudspeakers (networked ceiling or wall mounted) to adapt to any type and size of collaboration environment. Components are designed to seamlessly connect to the existing network and operate jointly in fully customized systems.

Solutions are also certified for deployment in tandem with leading conferencing and collaboration platforms such as Microsoft Teams, Zoom, and Cisco Webex, as well as third-party devices from vendors such as Lenovo, Logitech, and Crestron.

Although fully customizable, Shure's meeting and conferencing systems are marketed through three different propositions:

- **Microflex Ecosystem:** a portfolio of networked audio solutions including array and wireless microphones, digital signal processors, and networked ceiling loudspeakers designed to work together and customized for any size of meeting room or collaboration space with sophisticated needs
- **Stem Ecosystem:** comprising the audio and control components along with intuitive software needed to design, install, and manage a complete audio solution; with the flexibility to adapt to swiftly changing meeting room requirements, the lineup is designed for more straightforward deployments where scale and ease of deployment by IT generalists are key requirements
- **Home Office:** a portfolio of solutions targeting remote workers; including microphones and headphones the products combine high-quality audio typically required to create podcasts and webinars with the ease of use for everyday collaboration

Shure also offers a wide range of wireless presentation systems and devices, featuring best-in-class RF management, that can be used for miking presenters and lecturers for presentation, training, educational, and executive keynotes.

Shure's systems feature audio processing software (DSP) that eliminates echo and persistent and transient background noises and equalizes participants' speech levels to maximize collaboration. This overcomes typical inconveniences such as volume changes as presenters move around the meeting room. The systems provide complete coverage of in-room attendees and ensures that remote participants can hear and be heard clearly, so that all participants can contribute to discussions. Conversations and debates can therefore occur naturally, making collaboration more productive.

Shure Case Studies

Sims Lohman, a large furniture distributor based in the U.S., offers a good example of how Shure audio systems can bring corporate communication to a new level without the need for an audio specialist to install. With more than 25,000 kitchens supplied yearly, Sims Lohman needed an audio solution that could uplift daily communication both internally and with its network of industry professionals easily integrated into multiple conference rooms for high-quality Zoom meetings. Installed in-house without the need for specialized installers, Shure Stem Ecosystem enabled Sims Lohman to meet virtually with high-quality speech. Shure installed an integrated system comprising various components including Stem Ceiling, Stem Table, Stem Hub Express, and Stem Wall to capture multiple speakers blending in with existing meeting room furniture. Sims Lohman significantly enhanced audio coverage and was able to capture speech from anywhere in the room, improving the overall quality of meetings.

The Malaysian Management and Science University (MSU), in Shah Alam, Selangor, is a compelling example of how the Shure Microflex Ecosystem has facilitated the transition to hybrid for many organizations. The university needed a more flexible and scalable wireless system for the campus boardroom following heavier use of the rooms for virtual and hybrid meetings for speeches and panel discussions. Featuring gooseneck microphones and discussion units, the Shure Microflex Complete Wireless (MXCW) Digital Conferencing System provided a steady and reliable audio performance system. The discussion system gives up to 24 participants the flexibility to use it in multiple venues. The university now has the technology to create an inclusive experience for all users no matter how large the meetings or conferences. Leveraging portable discussion units and with no cables to limit participants' movement, Shure MXCW facilitated a natural discussion flow.

Conclusion

Though organizations are fine tuning their workplace strategy to maximize collaboration, many teams are still experiencing the familiar "can you hear me now ... I just lost you there" challenges that come with hybrid meetings. With knowledge workers working from an office only a few days a week now in most developed markets, there's simply no time for sound-related issues in office meetings. Teams should make the most of the precious time spent with colleagues in the office

during both scheduled and unprompted meetings. The ability to seamlessly integrate contributions from remote workers and external third parties is key to modern collaboration. Instead of getting in the way, technology should empower staff to effortlessly exchange views and get their voice heard wherever they are located. Poor audio quality causes stress for participants and distorts the perceived value of what is being said. This can have significant consequences in terms of employee experience, well-being, staff retention, lost opportunities, and poor decision making.

IDC believes employees should be offered great meeting experiences to enable them to enjoy their time in the office and naturally gravitate toward the workplace. Staff prioritize collaboration when they attend the office. Obsolete technology that does not facilitate collaboration is likely to discourage regular use of the office itself.

As companies transition to new hybrid models, the success of workplace transformation heavily relies on effective communication. Improved meeting and conferencing audio solutions can help them address meeting room challenges and make the collaboration journey pleasurable and fruitful for everyone.

MESSAGE FROM THE SPONSOR

For more than 95 years Shure has been providing solutions to let you hear and speak freely. From the boardroom to the classroom, we have designed products with both the technology manager and end user in mind. Our innovative, complete range of audio solutions is not only easy to set up, user friendly, and built to last, but has been designed to give you the highest quality experience in the most complex and demanding spaces — enabling you to make the most of every meeting. Learn more at www.shure.com/meetings

About the Analyst

[Mick Heys](#), Vice President, Future of Workspace and Imaging, IDC EMEA



Mick Heys offers strategic direction and advice to vendors and end-user clients. He is responsible for research into the future of work as it relates to physical aspects and spaces. He is particularly interested in the future of the office in the world of flexible and mobile working and the optimization of the workplace. He has over 30 years' experience in the office automation industry in business development, product management, and consultancy roles. His analysis and opinions are widely sought by industry leaders and investors. He is a frequent speaker, presenter, and moderator at industry conferences and client events.

About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

IDC UK

5th Floor, Ealing Cross,
85 Uxbridge Road
London
W5 5TH, United Kingdom
44.208.987.7100
Twitter: @IDC
idc-community.com
www.uk.idc.com

Global Headquarters

140 Kendrick Street,
Building B
Needham,
MA 02494
+1.508.872.8200
www.idc.com

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