

STATE OF MEETINGS 2021



An analysis of meetings and how they changed in 2020.

APRIL 2021

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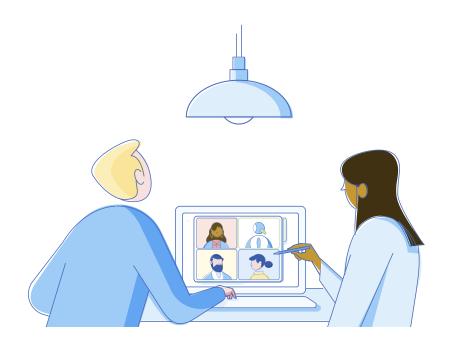
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Introduction

Meetings have long been a major aspect of the business world. From board meetings to sales pitches, that in-person interaction has kept our economic cogs turning. As the global economy has continued that journey forward, the reliance on meetings has increased. In fact, according to research conducted by the Harvard Business Review, meeting times have increased from around ten hours a week in the 1960s to nearly 23 hours by 2020.

All this extra time meeting can have a strain on many aspects of our lives - both at work and at home. It's not just the time eaten up by meetings that could be used doing other important tasks. More meetings often result in people having to work beyond the end of the business day and at weekends. This is why more and more research is showing that people are getting increasingly frustrated by unproductive and unnecessary meetings.

The COVID 19 pandemic has caused the biggest upset to the world's economy since the Second World War around 70 years ago. The way we hold meetings has been no stranger to this. National lockdowns and restrictions on travel have seen us turn to video conferencing as a way to meet the people we need to. Pitching new products to customers, conducting interviews for new staff and getting that face-to-face time with clients.



So how did meetings actually change in 2020? What will the long-term impact of this change be? And could 2020 have changed the way we meet for good?

These are all the questions we plan to answer in this report.

Understanding the data we used in this report

Doodle's State of Meetings Report 2020 is an in-depth, annual report looking at meetings conducted around the world. The information in this report is based on analysis by our Business Intelligence Team from over 30 million meetings booked on Doodle between 1 January and 31 December 2020. We have also used other trusted sources - that we've verified for accuracy - to help us understand market trends and give a clearer evaluation of our data. The findings in this report come from a collection of anonymized data that covered the following areas:

- Different types of meetings booked worldwide
- Virtual meetings by country and duration
- Meeting duration and participants
- Variations across different countries: US, UK, Germany and Switzerland

This information can be used by a variety of different organizations to get a clearer idea of what role meetings are having on their business. This in turn can lead to more productive and efficient meetings.



The Growth of Virtual Meetings

Key Findings

- Virtual 1:1 meetings increased by over 1,230 percent from January 2020 to December 2020
- Virtual group meetings rose by over 613 percent across the year
- Despite this massive rise in virtual meetings, they still only accounted for around 42 percent of all meetings

2020 saw virtual meetings grow on an unprecedented scale. The evidence is clear to see. Video conferencing tool Zoom saw revenue increase by over 355 percent, while here at Doodle, we've witnessed a massive increase in those using us to book virtual meetings.

This upward trend in virtual meetings is not something new - virtual meetings increased by just under 600 percent from 2018 compared to 2019 - but this has been accelerated by the global pandemic. That doesn't mean people haven't been reluctant to stop that in-person interaction.

A survey conducted by Doodle last year found that nearly 60 percent of respondents feared it would be more challenging to deal with clients online. Many worried that problems with technology, uncontrollable distractions such as background noise and not having the right equipment were all barriers to having productive virtual meetings. With the world gripped by the COVID 19 pandemic for most of 2020, the need to move to virtual meetings became a necessity. This has seen companies around the world invest in new tools for staff to communicate and hold meetings. There has also been a near meteoric rise in people's understanding and acceptance of virtual meetings. People have learned to adapt.

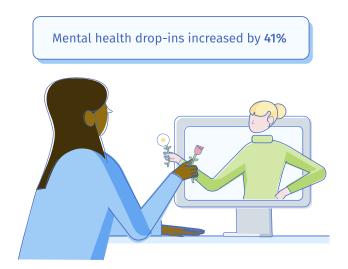
Although there are general trends that can be seen globally, there are also some regional differences that are worth exploring.

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Virtual Meetings - USA

- Virtual meetings increased among US users by 60.2 percent across 2020
- Americans seem particularly keen on checking up on colleagues to ensure their mental health was okay

Like the rest of the world, in the United States, virtual meetings have seen a dramatic rise in use. However, with lockdown restrictions varying stateto-state, some areas of the country continued to operate on more 'business as usual', in-person meetings than others.



With the size of the United States, virtual meetings have been something in practice for sometime. For years, this was likely people dialing-in but now is more likely to take the form of video conferencing through the likes of Zoom or Microsoft Teams.

Ever since the Space Race in the 1960s, America has been held as a pinnacle for technological innovation. However, there is also evidence that shows there has been a slower digital transformation of American business compared to other parts of the world. This in turn may have contributed to a more challenging climate when it comes to virtual meetings. For more than a decade, reports by universities, Congressional committees and experts have said the US is at risk of falling behind China in terms of technology and innovation. This was also echoed at the World Economic Forum in 2019 where America was accused of 'lagging behind in this new industrial revolution'.

It's not all doom and gloom though, as a survey conducted by McKinsey showed that between December 2019 and July 2020, the digitization of customer interactions had increased by over 58 percent. The investment in technology to conduct business may have slowed - but the global pandemic has forced business to catch up. In fact, many now say that even though the coronavirus pandemic has brought them tough trading conditions, they see the need to spend more on technology, not less.

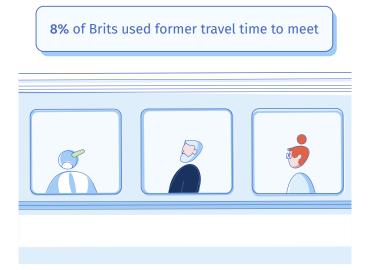
Mental health, whether their own or others, seemed to be something that was of particular importance to Americans. Across 2020, there was a substantial increase in the number of people either attending or hosting meetings about mental health. A report by the Academy of Management has said that employees who feel lonely don't perform as well. Regular contact with someone in the office, particularly if someone lives alone, can help to identify that early and act on it. This would correlate with the increase in these meetings.

Virtual Meetings - United Kingdom

- UK Doodle users increased their use of virtual meetings by 156.6 percent from the start to the end of 2020
- With less commuting time, just under 8 percent of Brits used their former travel time to hold meetings

Although the UK's four different nations all took different approaches to lockdown, on the whole, they broadly followed a similar path. Like many other European nations - a work from home message was in place for most of the year.

As part of this trend, there were a number of changes in how people held meetings. Aside from the obvious things like businesses moving online to sell their products, how people managed their working day changed too. One of the most noticeable things in the UK was that people were meeting more during times they would have normally been traveling.



Without a commute to and from the office, there was a noticeable increase in people having meetings later or earlier in the day. From the start of 2020 to the end, people meeting during traditional commute times (5-8pm) increased by 7.5 percent.

Data from the UK's Office of National Statistics showed that at some points in 2020 as little as 37 percent of people were travelling to work. However, where in the past employers feared that would have a detrimental effect, it seems the opposite has happened.

Research by CIPD revealed that 61 percent of employers reported improved employee collaboration and focus. Around 65 percent also said that home working has either improved or not impacted productivity levels. Equally, there is now a larger demand by employees for more flexible working arrangements. This has caused many employers to develop plans to expand or introduce home working once the pandemic is over - something that will see a further rise in virtual meetings in the UK.

Virtual Meetings - Germany

- Virtual Meetings saw a massive increase among German Doodle users rising 326.5 percent from January to December 2020
- Germany saw the largest jump in those looking for new ways to work remotely with the number of people starting Doodle trials for virtual meetings jumping a whopping 691 percent across 2020

Unlike the United States, in Germany, a federal approach to tackle the COVID 19 pandemic was adopted early. This saw a 'work from home' message implemented across the country's 16 states. This in turn saw a dramatic increase in the use of virtual meetings.



With the Germans very focused on maintaining a strong work-life balance, it's understood that even in remote work settings, Germans are very rigorous about keeping a distinction between work and home. On top of that there is a big expectation that people arrive prepared and punctual to a meeting.

Like in the UK, German companies reported seeing an improvement in productivity by having people work from home. So much so that a report by Deloitte found that nearly 70 percent of Germany companies have long-term plans to introduce remote working. This can go some way to explaining why so many Germans were looking for tools to facilitate their new 'work from home' model.

Doodle trials rose exponentially in 2020 but there was also a similar explosion in the use of video conferencing and digital meeting tools. Platforms like Zoom and Dropbox have been tried and used to help ensure productivity remains high. This in turn can lead to more efficient meetings, a better working day and most importantly of all for the Germans that work/life balance.

Virtual Meetings - Switzerland

- Virtual meetings in the Alpine nation more than doubled among Doodle users with an increase of 195.5 percent between January and December 2020
- The Swiss still like to meet in person with only 13.5 percent of group meetings taking place virtually the lowest of all nations

Switzerland seemed to take more of a middle ground, somewhere between the US and other European countries, when it came to virtual meetings. Yes, there was an incredible rise, but smaller compared to the likes of Germany.

This indicates that although many more people were working from home, a significant amount were still working from an office. A reason for this could be that legally imposed lockdowns were shorter in Switzerland than in other European countries, meaning it's likely employees expected to return to (a fairly normal) office life. There's also evidence that unlike other countries the cultural shift in Switzerland to move to remote working is slower. The Swiss Federal Statistical Office recently released information that showed of the 25 percent of employees who say they work from home - only 3 percent say they do so regularly. In contrast, that figure in the EU was 17 percent.

Doodle data emphasizes this point. It showed that virtual meetings made up about 13.5 percent of all group meetings in Switzerland - compared to the UK where they made up 43 percent.

Although there is a trend for more remote working in Switzerland, like there is in the rest of the world, experts believe there is a lot that needs to change in Switzerland before remote working follows the same path as other countries.



Conclusion and Trends

There are a number of significant points we can take from the growth of virtual meetings, both globally and at a national level. This in turn can help establish what the future may look like for meetings.

Virtual meetings are here to stay

When the COVID 19 pandemic first hit, there would have been more than one or two company directors thinking about what's going to happen to their business. However, as terrible as Coronavirus has been, many have discovered that employees can be just as productive working remotely.

This creates a number of opportunities. First, companies no longer have to invest in large office spaces. Smaller offices for core staff with hotdesking could do the trick with the majority of employees working from home. That could be a massive way to cut costs.

There's also the benefit it can have on staff wellbeing. If things like lengthy commutes can be practically eliminated, the mental health of employees can be dramatically increased. That enviably leads to better productivity and less staff absence.

The return to normal will be a new normal

Once the world is vaccinated and we begin to return to what we would call normal - for many aspects of our lives that normal will be different. How we meet with clients will be no exception.

Many of the fears around having virtual meetings are gone. Whether people work in sales, consulting or recruitment, they are realizing that they can maintain the relationships they need to, just as well virtually as they can in person. In fact, many experts are saying that virtual meetings are just what we needed. They increase productivity, ensure the right people are present and stop one voice from dominating discussions.

Say goodbye to the nine to five

According to a study by Softchoice, 70 percent of Americans would consider leaving their job for one with more flexibility over their working hours. This is a figure that is likely to be mirrored around the world.

Although it may have started with the tech startups, more and more companies are looking at results over time. That is to say, providing an employee can deliver what is expected of them - they can work when they want.

Virtual meetings are a major tool that is helping companies achieve this. Being able to arrange a get-together outside standard office hours means employees can work when they want, not when they have to.

In the same way that remote working is helping improve mental health, so too is a more flexible approach.

Startups have a window of opportunity

Many startups already worked at the forefront of technology, so virtual meetings were never as daunting as they may have been for more established businesses.

This presented a huge opportunity for them. Where older companies needed to invest in technology and training to get people used to meeting via the likes of Zoom or Microsoft Teams, startups could plow on with meeting clients and building relationships.

Based on the dramatic increase in virtual meetings we witnessed in 2020, this advantage isn't going to last for long - but for a short period of time, it could be just what some startups need to compete for business.

How did Types of Meetings Change in 2020?

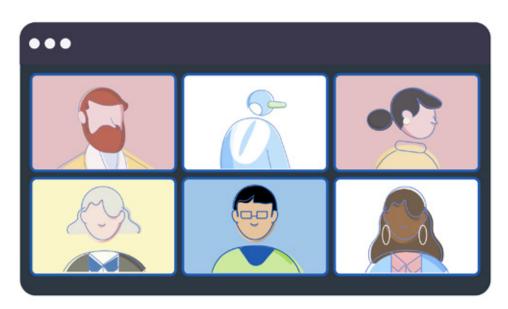
It goes without saying that as more people meet virtually, the number of in-person meetings goes down. That's not to say they weren't happening, but the dynamics of how they happened changed a lot in 2020.

Group Meetings

- Five attendees was the most common group meeting size in 2020. Although this was the same as 2019, there was a drop of over 65,000 meetings.
- Larger meetings are more common in Europe (on average ten people would attend) com-pared to the UK on 8 and the US on 6.
- 60 minutes was the most common meeting length in 2020. It increased from making up 27.6 percent of all group meetings in January to making up 43.5 percent by December.

At the start of 2020, there was initially a massive drop in the number of people scheduling or attending group meetings. This is because as various restrictions took hold, many companies were still working out how to deal with their employees working in a different way.

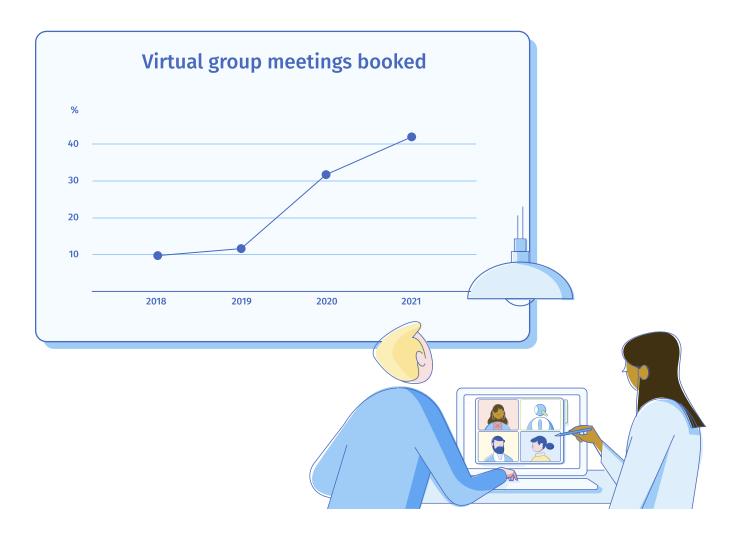
As the year progressed and new remote working tools were introduced, group meetings started to return. By the end of the year, there were actually more group meetings happening than the same time in 2019. There's also evidence that as employees and businesses got more confident with video conferencing and meeting in different ways, they were willing to meet for longer. Although it seemed at the start of the year, people were changing their attitudes in how they met - longer meetings quickly returned as confidence in technology grew.



That doesn't mean these new virtual group meetings don't come with their own set of challenges.

So-called 'Zoom Fatigue' grew exponentially as a phenomenon in 2020. Clinical Behavior Analyst, Laura Dudley, explains that the condition comes from an "over-taxing" of our brains - having to make up for non-verbal cues we normally rely on when talking to someone face-to-face. Virtual group meetings also require a greater degree of planning and control. With people potentially working across multiple sites or timezones, agendas and briefings need to be clear and delivered in plenty of time.

It's also important that someone takes charge. Unlike in a meeting room where, if needed, voices can compete - a virtual group meeting will generate nothing more than incoherent noise.



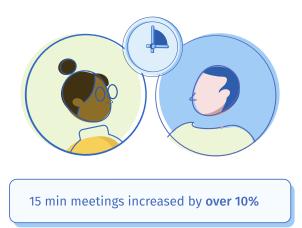
One-on-one Meetings

- Although 30 minutes remains the most common length for 1:1 meetings, it has decreased from 39.2 percent of all meetings in January to a little under 35 percent in December.
- 2020 was the year for short meetings with 15 minutes meetings increasing by 10.8 percent.
- Across the whole of 2020, the amount of 1:1 meetings increased by over 62 percent.

With the way 2020 went, it's no surprise that virtual meetings increased. More people than ever before were working remotely and that requires regular check-ins with managers, colleagues and clients. Let's think about the office. If someone isn't able to drop by a colleague's desk to ask a quick question then a quick 1:1 is needed.

It's not only situations like this though. Salespeople working towards targets, will need regular time with their managers to keep them updated or consultants will need to update clients on projects. Some, such as Red Hat CEO Jim Whitehurst, have argued that shorter meetings are more productive as people maintain a focus on the issues being discussed. Scientifically, it makes sense. Our bodies are designed to maintain a focus for around ten to 18 minutes before they check out. If meetings are no longer than around half an hour, the meeting can stay productive. It also allows employees to spend this time when they would be in meetings doing something else - reducing the chance of burnout or fatigue.

There's also the mental health aspects that we've touched on already in this report. A report by Harvard Business Review found that remote working is more likely to leave employees feeling alienated compared to those in an office. Although, it's the Americans leading the way with mental health check-ins, more 1:1 time is happening around the world for this reason.

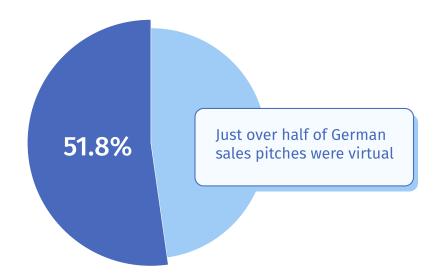


Sales Pitches

- Across 2020, sales pitches increased on average by around 12.8 percent, but those taking place virtually increased by just over 28 percent.
- Germany saw the biggest increase in sales pitches, nearly 24 percent across the year. Over half of these 51.8 percent were virtual.

Video conferencing doesn't stop companies from selling. A bold statement but it's what the facts say.

For years, it was often widely believed that not being able to pitch to a customer in person would result in not being able to convert sales and for profits to drop. In fact, it seems the opposite is true. A Doodle survey from last year revealed that 65 percent of respondents said they hadn't lost any customers. 30 percent even said clients were less likely to cancel meetings compared to when they were in person. This is further reinforced by research from McKinsey. They spoke to sales leaders about whether they found traditional or digital sales interactions more important. Prior to COVID 19, 52 percent believed that traditional methods, such as meeting in person, were more important. Once the pandemic started that number dropped to 32 percent with 66 percent believing digital was more important. A major shift in such a short space of time.



- Interviews and onboarding increased in 2020 by 38.2 percent. Virtual recruitment on its own increased by just under 64 percent.
- Germany saw the biggest rise in virtual recruiting with a massive 110 percent rise from January to December 2020.
- The United States saw a **drop** of 6.4 percent in recruitment meetings across the year even though virtual meetings increased by over nine percent.

The data here reinforces what we have seen many companies around the world already say they are doing - recruiting remotely.

In 2020, a number of large multinationals announced they would allow staff to work from anywhere. For instance, Facebook CEO Mark Zuckerberg told staff last year that the company would "aggressively open up remote hiring" and expects at least half of staff to be working remotely in the next five to ten years.



Although it seems like there were less recruitment meetings happening in America across 2020, the amount of interviews and onboarding happening in comparison to other countries was already high -18.6 percent of all meetings in De-cember 2020 compared to 3.3 percent in Germany. While this suggests that recruitment slowed in the US more generally across the board than it did in other nations, it was still happening and doing so in fairly large numbers.

The move to virtual recruitment, whether that be interviews or the onboarding of a successful candidate after they been appointed, isn't something unexpected. However, the need to embrace new and creative ways to recruit staff thanks to the pandemic has sped up the transition by several years.

According to Jack Whately of The Human Code of Hiring website, employers will be forced to have a more streamlined process for recruiting. This is to avoid existing employees burning out from being overworked or applicants getting frustrated and withdrawing their application. This is something that a virtual recruitment process will only speed up not hinder and so we're unlikely to return to old recruitment practices any time soon.

Internal v External

• Around half (46.2 percent) of meetings that occurred last year were between colleagues.

It might be surprising to some, but nearly half of all meetings in 2020 were between colleagues in the same company. Although this has seen a slight increase due to COVID 19 and remote working, the figures are still broadly in line with the year before.

Although the data might not have changed much, there is a difference between how people behave internally compared to externally. Generally, they are more relaxed and informal. However, internal meetings are also the most likely to add an unnecessary burden to an employee's day. Client-facing meetings will often have a more clearly defined purpose. That's not to say they can't be wasteful or unproductive, but generally have a more fundamental reason for being held.

Internal meetings on the other hand tend to be poorly structured, badly timed and ineffectively run. In a report by the Harvard Business Review, one person described stabbing herself in the leg with a pencil to stop herself from screaming during a torturous staff meeting. If businesses want to improve efficiency, they need to cut back on the unnecessary internal meetings.

Board Meetings

- 91 meetings had over 1000 people attend in 2020. This was up from 51 in 2019.
- The average increase in virtual board meetings around the world was 117 percent.

Unlike a lot of other meetings, board meetings have to happen. By law, in most countries, large companies are required to hold shareholder meetings at least once a year. COVID 19 made this a real challenge.

The data from 2020 shows us that a large number of board meetings moved online. Although something that seems unfathomable a few decades ago, a number of large corporations, where the shareholders extend into the thousands, held their AGMs virtually.

Many countries passed emergency legislation to allow for these virtual meetings to happen. However, according to research by EQS Group much of this is temporary for the duration of the pandemic, meaning that a return to physical meetings will be expected in the future. With this seemingly going against the trend of virtual meetings, it would seem a more hybrid model of physical and virtual that some companies offered as an extra before, might in fact become the new norm.



What Type of Meetings will we be having in the Future?

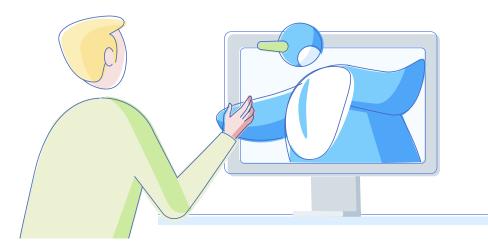
When it comes to what COVID 19 has done to the future of meetings, describing it as a catalyst feels like the only logical answer. Meeting digitization, video conferencing and the development of new technology to make meetings easier was already happening, but has likely jumped about five to ten years forward because of the pandemic.

Remote working means more meetings have to happen online. From catch ups between managers and employees to sales pitches - that necessity to be there in person is gone. This is also likely to affect other ways businesses work too. Take recruitment, evidence shows that more companies are moving to a remote working model, allowing employees to work from wherever they want. Streaming giant, Spotify, is a good example of this. It announced its developing a 'work from anywhere' model. This means that not only can you work remotely, but choose what country you want to work in too. This means more virtual interviews and onboarding.

It's also not just how we meet that will change. Expectations and structures will be different too. We might still call our meetings the same thing, but more and more it's likely meetings are going to adopt a 'hybrid' model. Research by technology company, Barco, found that 85 percent of people want a combination of working from home and in an office environment. Something that could go a long way to alleviating Zoom Fatigue as well as other problems caused by virtual meetings.

This will create a need for a more clearly defined structure to a meeting, likely with a set agenda or reading material distributed beforehand. In a recent Doodle survey, 31 percent of people said that when a meeting involves a virtual element they are more likely to send an agenda ahead of time to ensure everyone is prepared. This becomes even more important when some participants will be there in person and others are dialling in.

Meetings will be shorter. We've seen from this report that there has been a rise in shorter 1:1 meetings. Our data also suggests that, to a lesser extent, a similar rise is happening in other meeting types too. A growing body of evidence is pointing towards shorter meetings being more productive and helping to reduce the chances of burnout among employees. COVID 19 has forced businesses to experiment with this. Richard Holden, a professor of economics, has reviewed data released by the Harvard Business Review. It shows that although people met more often during lockdown - they met for shorter amounts of time. These shorter, more focused meetings could be one of the reasons some people say they feel more productive when working from home.



Notice: Did we give more of a heads up about a meeting in 2020?

- On average 27 days notice was given for meetings in 2020. This is a decrease from 36 days in 2019.
- There was an 18 percent increase in the amount of meetings booked with less than five minutes notice.
- The vast majority of meetings had over five days notice (75 percent). 54 percent had more than ten days notice and a little over 40 percent had 15 days notice.

There is clear evidence that an increase in remote working has caused a reduction in the amount of notice given for meetings. Our data suggests that although people still expect notice for a meeting, there's now more of an expectation that meetings can occur ad hoc. There can be a variety of reasons for this. For instance, working remotely means that there's not the same opportunities to drop by a colleague's desk, so jumping into a quick virtual meeting may be necessary to get a problem solved quickly.

"We're needing to have more meetings because we don't see each other for those impromptu conversations."

Don Shortslef, practitioner for Duke Learning & Organization Development

Even though there has been a reduction in the amount of notice given for a meeting, the data shows that the overwhelming majority of people are still getting at least five days notice of the event.

The likelihood is that for larger group meetings people are getting enough notice to read notes and prepare what they need to. This is something a survey by Doodle confirms. When asked about preparing for meetings in 2020, 34 percent of people said they spend more time practicing. Meetings that occurred with little to no notice are overwhelmingly 1:1s that last for around 15 to 20 minutes. Group meetings that occurred at short notice were much rarer and suggest that some sort of time sensitive or emergency situation has arisen.



The growth of technology in arranging meetings

It's fair to say that the rapid development of technology over the past few decades helped many businesses cope with the sudden changes they needed to make in order to survive 2020. Cloudsharing platforms, video conferencing and the ability to work nearly anywhere have allowed so many organisations to continue functioning where only 20 years ago there is a strong possibility they would have had to close.

Even when it comes to meetings, the developments in technology have been a game-changer. Tools like Doodle, for instance, turn planning a meeting into a task that takes seconds not hours.

Despite all these advances it still tends to be the case that most people work from a desktop or laptop. It's practical. They can process more, store more and generally cope with multiple tasks much better than a phone or tablet.

That would leave us to believe that despite the trend towards mobile, when it comes to booking meetings we still do that via our desktops. That however, doesn't seem to be the case.

Are we booking more meetings on the go?

It would seem that despite being stuck at home and generally arranging meetings when we're in front of our computers, we're still booking more meetings via mobile and tablet devices. In 2019, a little under half of all the meetings we booked were via a mobile. One year later, that had increased to over 60 percent.

Booking meetings via a tablet also increased from 12.6 percent in 2019 to 16.9 percent in 2020. Unsurprisingly, this rise in mobile and

tablet usage saw a sharp drop in those booking meetings via a desktop. In fact, it almost halved from a little over 38 percent in 2019 to 21.3 percent in 2020.

There are a number of reasons why this change occurred - despite more people that ever working remotely.

More devices that ever now enable syncing between their desktop apps and a mobile or tablet device. Take your calendar for instance, when you confirm a meeting on your computer, the calendar on your phone is automatically updated. It makes sense then that if you're on your phone and an invite pops in - you'll just confirm it.

There's also the way we're meeting that has to be considered. Years ago, video conferencing could only happen with expensive technology that required its own phone line and space. Now, the likes of Zoom and Microsoft Teams can fit seamlessly into your phone or tablet. In 2020, daily downloads of Zoom increased from 56,000 in January to 2.13 million by March. Using a video conferencing tool on your mobile or tablet means meetings can take place anywhere - employees aren't tied to their desks anymore.

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About Doodle

Doodle is one of the world's leading scheduling technology platforms, helping some of the largest brands instantly meet with clients, colleagues and teams. It is used by over 30 million active monthly users around the globe to provide a smart alternative to endless back-and-forth emails.

Doodle integrates effortlessly with calendars and various communication tools to truly simplify meeting organization for companies, the selfemployed and private individuals. Part of the Swiss media company, TX Group, Doodle AG is headquartered in Zurich, with offices in Berlin, Atlanta, New York and Belgrade.

Contact Us

To learn how Doodle can help you get meetings scheduled quickly and effortlessly, contact our sales team for a product demonstration.

If you would like to test out Doodle before committing long-term, you can get started with a 14-day trial. If you're a journalist or analyst and would like to request more information about this report or speak with Doodle CEO Renato Profico, please contact our corporate communications/PR team at press@doodle.com.

