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This should have been a video

The state of workplace communications



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Contents

03	Foreword
04	Introduction
05	The communication chasm
09	Business as unusual
15	How video can boost your KPIs
22	Rethinking “executive presence”
29	Your organization through the lens
35	Methodology

Foreword



Jason Mander
Chief Research Officer

The way we communicate at work has been changing for quite some time, partly because our relationship with work itself has evolved. This was true when we started researching the working lives of professionals long before anyone had heard the word “coronavirus.” Now, in the wake of a pandemic that has upended everything, understanding this shift is critical.

How do we ensure effective communication in this new reality? As leaders, do we fully understand what our employees need when it comes to staying informed? And what’s the best medium for our message? Never have questions like these been so pressing.

While there are no simple answers, research can guide us in the right direction. That’s why we’re pleased to partner with Vimeo on this report. Together, we’ve explored the perceptions and challenges that professionals are facing around strategic communication - and how embracing video media makes a positive impact. We hope these insights can help businesses as they adapt to the communications needs of today and, ultimately, tomorrow.



Brooke Hinton
Director, Consumer Analytics & Research

Here at Vimeo, we’re in the business of video. And video is having a revolution.

Long before this current pandemic, video had been the driving force behind major cultural and communication shifts. In the 20th century, video was art and entertainment. In the early 2000s, smartphones democratized personal video for billions of people. In the last decade, businesses got on board, using social media to take video straight to their audiences.

And this year, with so many people in the world staying at home and working remotely, video has completely reshaped how we work and communicate with one another. Through this study with GlobalWebIndex, we learned that the pandemic has fueled digital

transformation for businesses in ways that both affirmed and surprised us.

Large companies and top executives reported that not only is video an effective way to communicate, but that it actually drives employee engagement and productivity. Employees at video-savvy orgs even reported higher confidence in their company’s ability to stay profitable during a crisis.

No one really knows what the future of work will bring, but we know video continues to be a consistent, driving force in helping businesses and their employees succeed, especially in a post-COVID world. Our work with GWI has made this clear — everyone must use video or risk being left behind.

Introduction

Several months into the largest experiment in remote work the world has ever seen, we wanted to know...how's it going?

The answer depends on whom you ask.

Through the course of our research with GlobalWebIndex into workplace communication, we found that sentiment varies quite a bit based on age, industry, and seniority level. For example, we uncovered a major disconnect in the way executives and employees perceive the frequency and effectiveness of internal communication efforts. Take communication frequency:

54% of high-level execs say that they stream major company updates (like town halls and all hands) at least weekly. Only **20%** of employees agree.

This figure and dozens like it all point to an unsettling truth — that the way we communicate corporate strategy, updates, and other crucial messages at work is in need of *fundamental transformation*. Not only does the current system poorly serve the workforce of today, but it is completely misaligned with the workforce of *tomorrow*.

The problems with this disconnect run deep, as poor communication

is associated with many negative workplace outcomes. These range from daily challenges in collaboration and productivity, to more serious threats — like noncompliance and, in some industries, safety hazards. As a global pandemic jolts us into a future of work that most companies were ill prepared for, the implications of this are profound.

Our joint study with GlobalWebIndex explored many of these issues, and also their potential solution; video communications. In fact, we found that employees at video-forward companies were over

50% more likely to say their company was ready to face the future of work. Video-savvy workforces were also twice as likely to rate their companies' collaborative environment and employee training as "excellent" and 75% more likely to report excellent employee engagement at their workplace.

Employee engagement is so hard. If all you have to do to move the needle is change the medium to video — why wouldn't you?

Let's take a look at the future of work.

Chapter 01

The communication chasm

Between corporate leadership and their employees lies a vast communication chasm, with crucial information being lost in a deluge of online meetings, emails and instant message notifications.

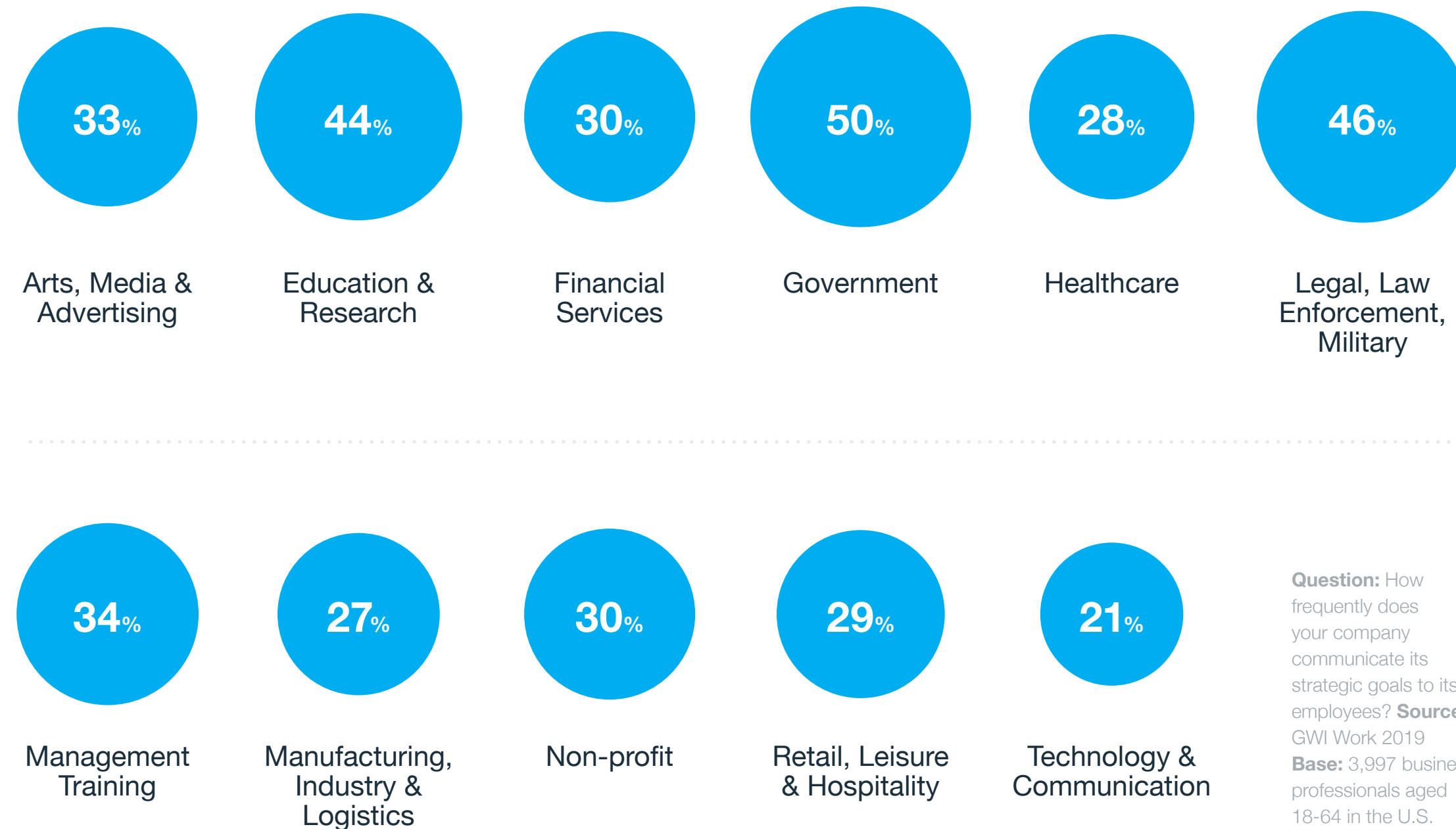
Effective communication is always important —but when navigating a crisis, it is critical. Executives know this, and believe they communicate frequently and effectively. Their employees, however, see it very differently. 54% of high-level execs say that they stream major company updates (like town halls and all hands) at least weekly. However, only 20% of employees agree.

Businesses must take note, as the consequences of ineffective communications are severe. Those who rate their companies poorly on communication are 4x as likely to rate their companies poorly on compliance, and 5x as likely to rate them poorly on both collaboration and productivity vs. the average.

Mixed signals and missing messages at work

For many industries, strategic communication lags behind

% of U.S. professionals across industries who receive strategic communication yearly or less



Question: How frequently does your company communicate its strategic goals to its employees? **Source:** GWI Work 2019
Base: 3,997 business professionals aged 18-64 in the U.S.

Poor corporate communication leads, in simplest terms, to a workforce that's missing the message.

Findings from GlobalWebIndex's annual survey into business professionals reveals that, in the U.S. in 2019, 33% of employees say their companies communicate strategy updates once a year **at most**. For 12% of business professionals, their companies **never** communicate strategy updates.

Infrequent or poor communication of company strategy means, ultimately, that your workforce is missing context that is critical to success in their jobs and crucial for your company's growth.

But not all industries are created equal. Tech, healthcare, and finance rank among the best industries for frequent communication, with two-thirds to three-quarters of employees receiving at least quarterly updates. Education, government, and legal services, on the other hand, sit on the other side of the spectrum — with nearly half of professionals in these industries receiving updates only yearly or even less often.

The long-term consequences of this are striking. A powerful relationship exists between how frequently businesses communicate their strategy and how healthy both their culture and financial outlook is.

1 out of 8 business professionals say their companies never communicate strategy updates

Companies that frequently communicate their strategy across the business show stronger expected revenue and workforce growth. Additionally, their employees are less likely to report problems with engagement, alignment, and morale.

The perception gap: where leadership and employees disagree

Our study into workforce communication both pre- and post-COVID-19 found a serious gap in how employees vs. executives feel about corporate communication.

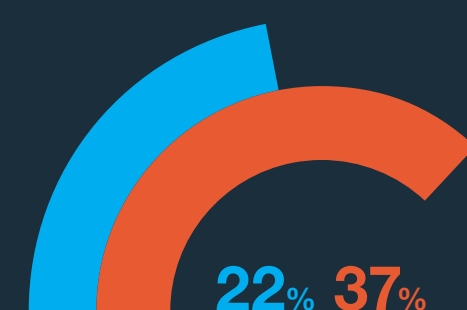
High-level executives have been operating, it seems, under the assumption that their communication is both **more frequent** and **more effective** than how their employees perceive it. According to executives, the companies they work for are faring quite well at both peer-to-peer and management-to-employee communication, both pre-COVID-19 and during COVID-19. They also feel their company's transition to remote working, in response to the crisis, has been very successful.

When you look at what the average employee has to say about some of these issues, however, there's a different story.

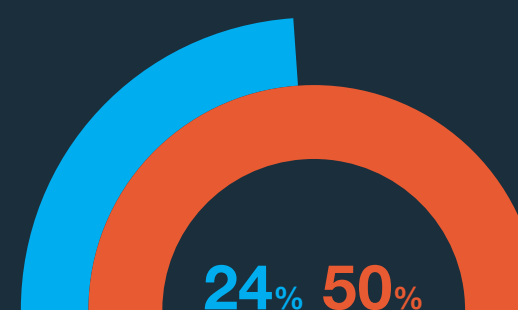
Pre-COVID-19, execs and employees had very different perspectives on communication

% who rank their company as excellent in terms of the following attributes (pre-COVID-19)

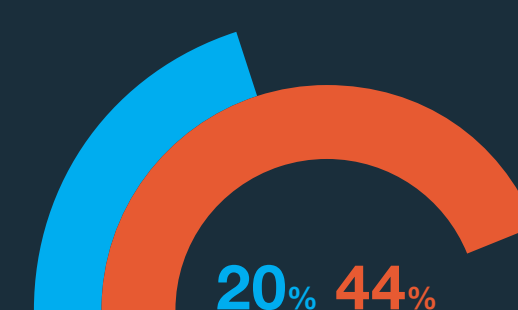
● Non executives ● Executives



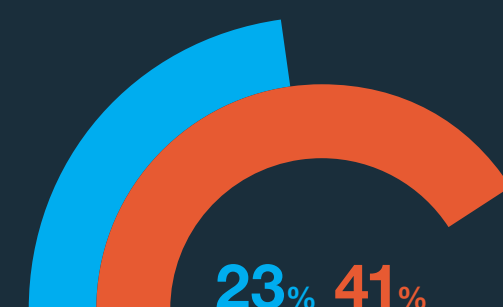
Employee engagement



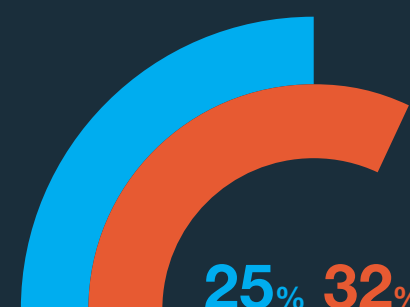
Peer-to-peer communication



Communication between leadership and staff



Collaborative environment



Employee understanding of company goals, strategy, and performance

Question: Thinking about your company prior to COVID-19, how would you rate it in terms of the following attributes? : "Excellent"
Source: GlobalWebIndex / Vimeo Study May 2020 **Base:** 1,637 U.S. professionals not responsible for executive functions and 122 U.S. professionals responsible for executive functions



Our higher level managers did not always communicate important information to the staff, but now it seems a little better. The most frustrating thing is not knowing what the future brings.

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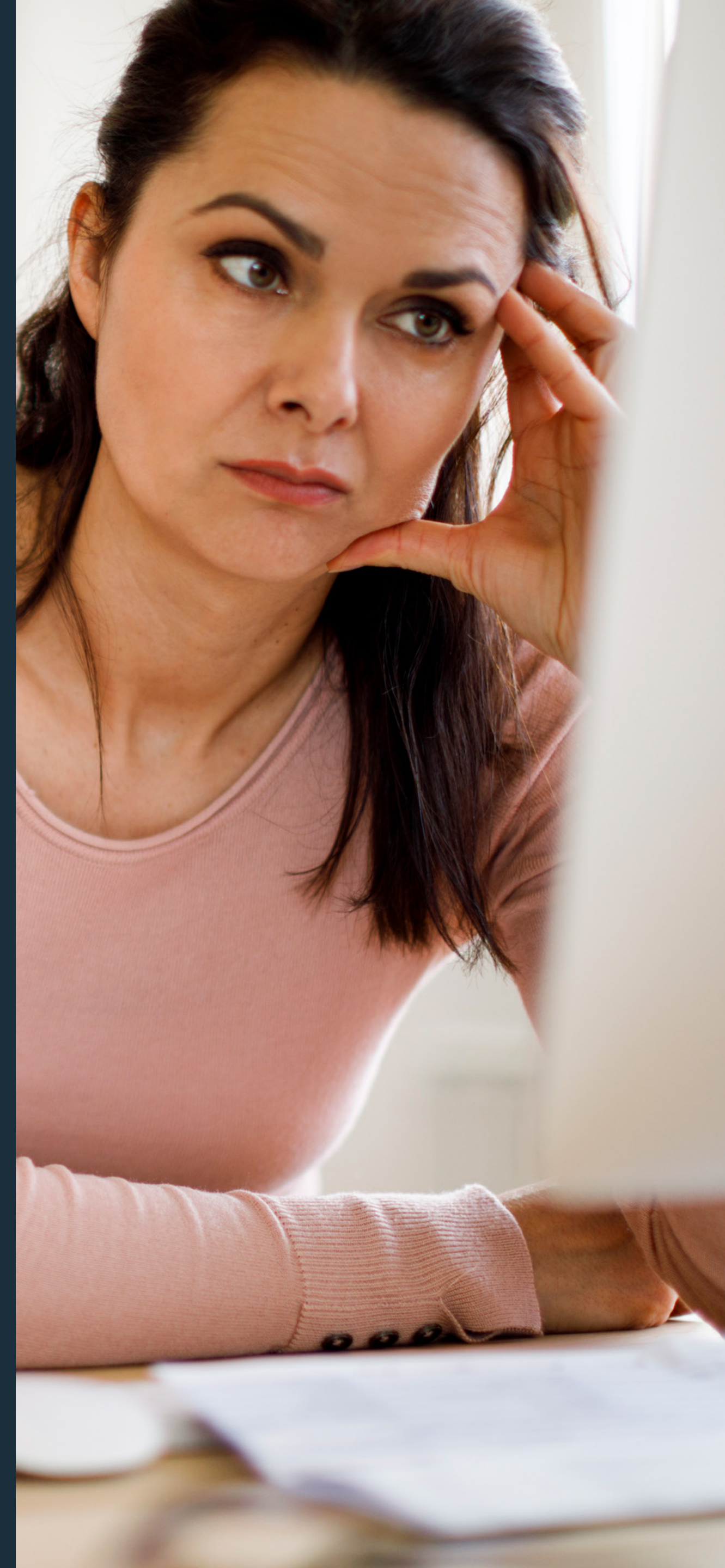
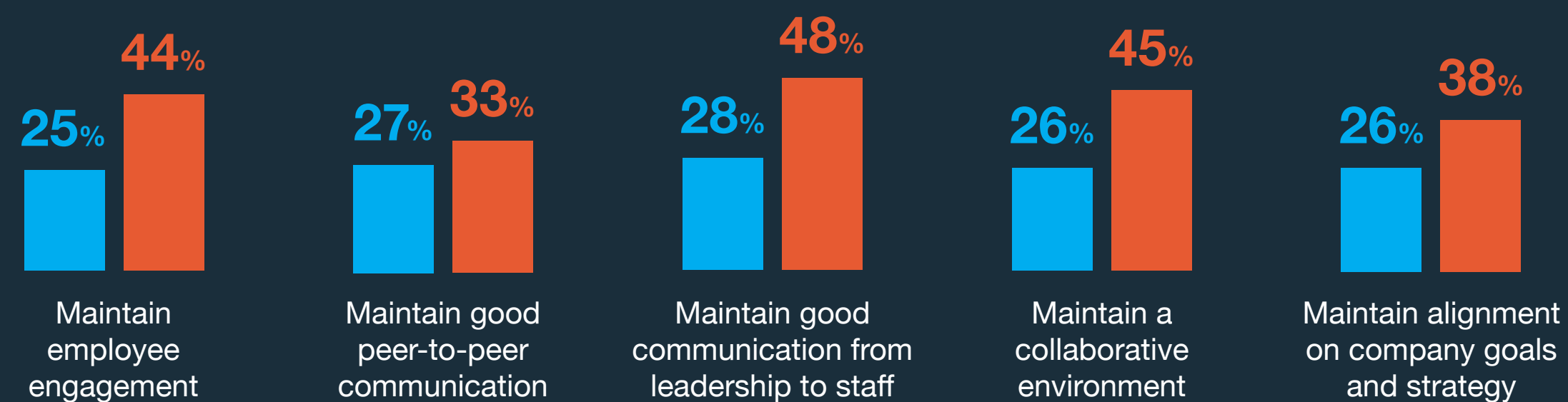
This disconnect isn't necessarily net new. Pre-COVID-19, 44% of execs rated communication between leadership and staff as "excellent," but only 24% of employees felt the same. The pandemic, however, has widened the gap significantly — and this poses a big problem for executives and employees alike. These divergent viewpoints impact employee engagement, morale, and — ultimately — company performance.

Question: Thinking about your company right now, how confident are you that it will be able to weather the COVID-19 crisis in the following ways? **Source:** GlobalWebIndex / Vimeo Study May 2020 **Base:** 1,637 U.S. professionals not responsible for executive functions and 122 U.S. professionals responsible for executive functions

Post-COVID-19, the gap between employees and execs widens

% who are completely confident that their companies can weather the challenges of COVID-19 across the following metrics

- Non executives
- Executives



Another place for my company to improve in communication is communication flow from the management of my division (a 30-person team) to the rest of the team. Information does not trickle down as easily and as quickly as it used to.

Chapter 02

Business as unusual

The global pandemic has catalyzed the future of work. Suddenly, the digital transition that seemed years away arrived at our doorstep overnight, and the professional challenges of tomorrow became the challenges of today. So, what does the future of work look like, and how do we reframe our corporate communications to best adapt to it?

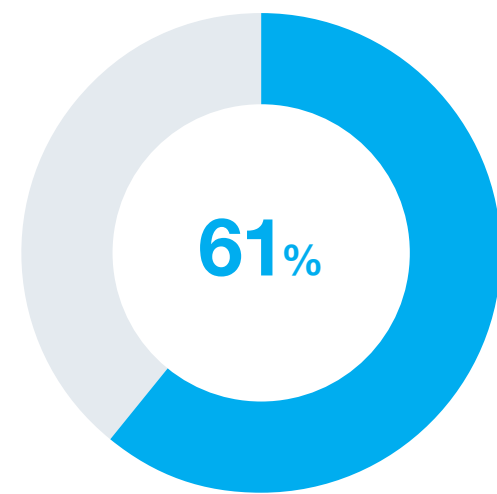
Even before the pandemic, working remotely was permitted at least some of the time for 85% of professionals; for 37%, it was broadly accepted

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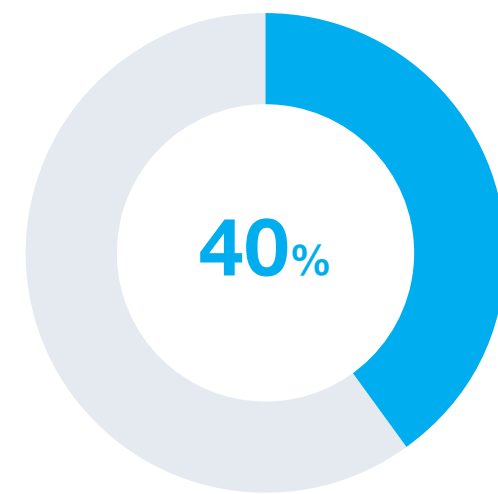
How to thrive in the shift to remote

Most professionals are working in a variety of environments

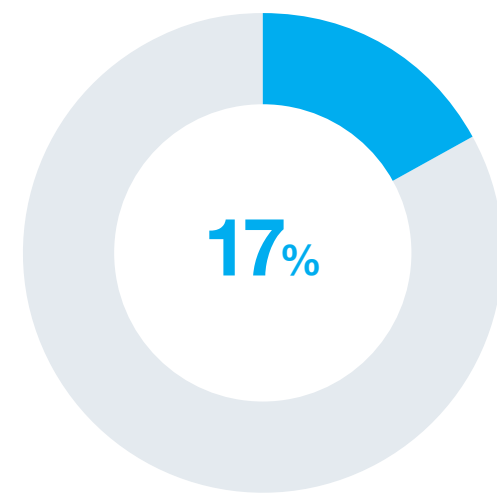
% of professionals who would work from the following locations during a typical week (pre-COVID-19)



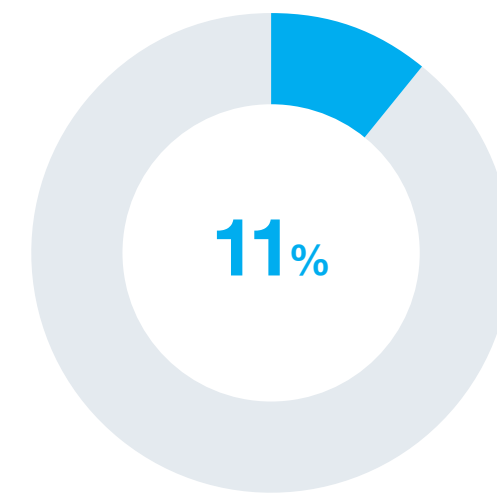
My company's office



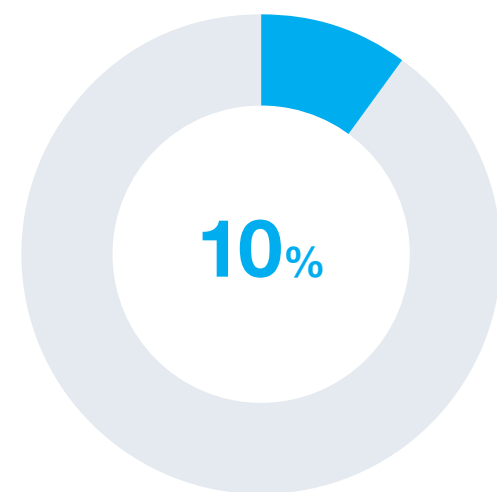
At home



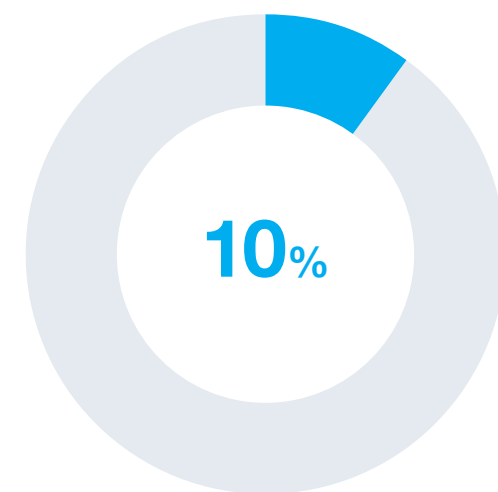
On-the-road / traveling



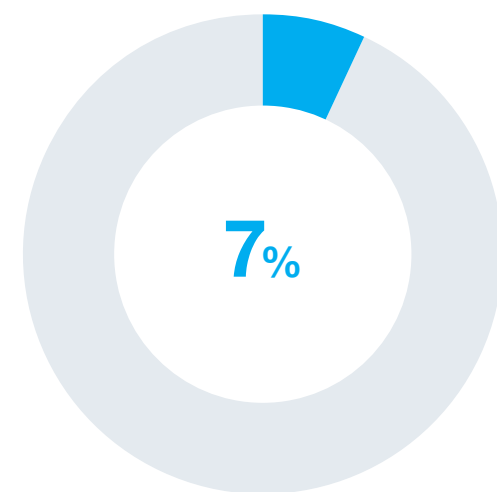
A co-working space



A client's workplace



In a factory floor / laboratory / warehouse / store

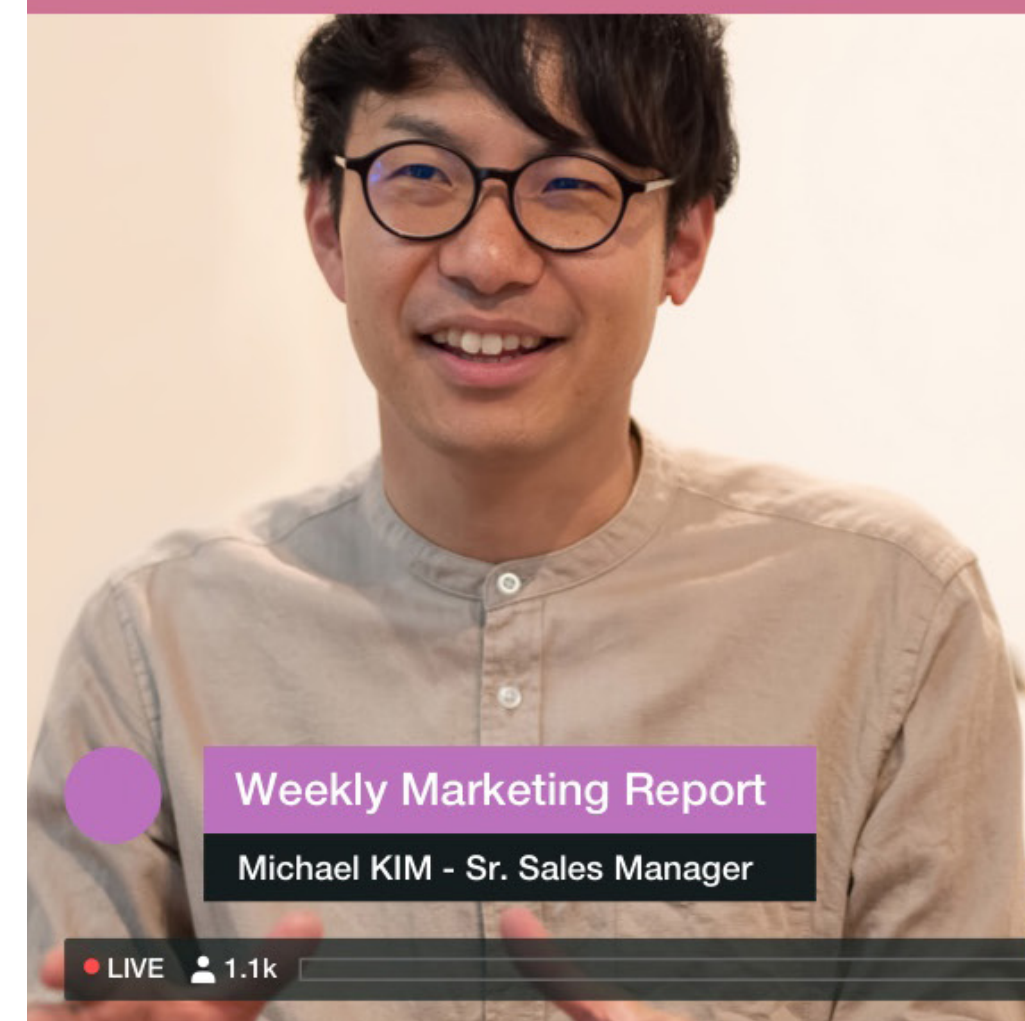


A remote location such as a coffee shop

Question: Prior to the COVID-19 global health pandemic, which of these places might you / your team work from during a typical week?
Source: GlobalWebIndex / Vimeo Study May 2020 **Base:** 2,175 business professionals in the U.S. aged 18-64

Nothing characterizes the modern workforce quite like the concept of going remote. And even before the global pandemic, remote working was set to be the future of work.

Professionals have been increasingly working from a variety of environments. The most common of these, outside of the office, was always the home — serving as a workplace for 40% of people at least some of the time.



Weekly Marketing Report

Michael KIM - Sr. Sales Manager

LIVE 1.1k



Weekly Ma

Michael KIM -

LIVE 1.1k

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Since the global pandemic, however, the shift to remote has been near-universal for the office-based, professional workforce. But as the modern workforce moves in this direction, what tools and processes will shape this? Who is thriving now and — by extension — who will thrive in the future of work?

According to our research, professionals on the receiving end of better corporate communication methods — specifically video — are the early success stories.

In companies where management had adopted video for corporate communication before the pandemic, employees were **over 50% more likely to see their organizations as being well-equipped to transition into the future of work.** And now during the pandemic, employees in video-savvy organizations continue to rate their companies as better adapted.

An engagement with video means a more successful transition to the future of distributed work

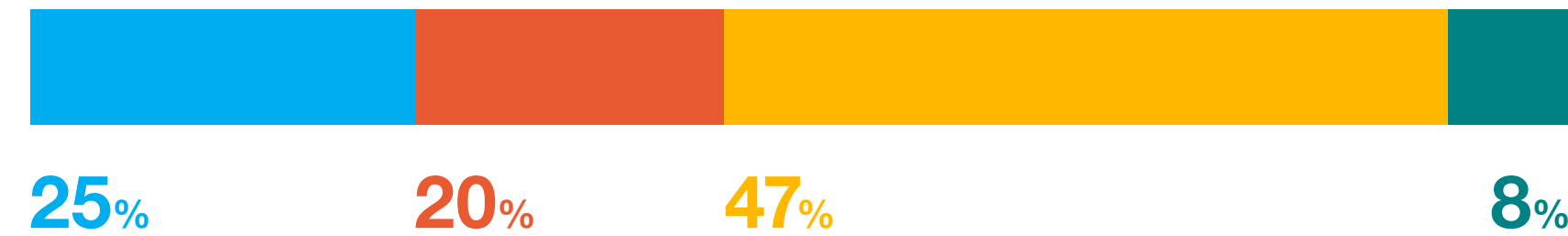
% of professionals who felt their company was well equipped vs. not to transition to remote working, pre-COVID-19

● Poor ● Neutral ● Well equipped ● Not relevant to my job

Leadership using video (pre-COVID-19)



Leadership **not** using video (pre-COVID-19)



Question: Prior to the COVID-19 crisis, how well equipped would you say your company was at facilitating employees to work remotely? **Source:** GlobalWebIndex / Vimeo Study May 2020 **Base:** 1,247 U.S. business professionals whose leadership were using video streaming for executive communication pre-COVID-19 and 933 U.S. business professionals whose leadership were not doing so

How successfully have they managed to adapt to remote working?

% of professionals who felt their company's transition to remote working had been successful vs. not

● Poor ● Neutral ● Successful ● Not relevant to my job

Leadership using video (post-COVID-19)



Leadership **not** using video (post-COVID-19)



Question: How would you rate your company's success in adapting to managing a remote workforce in response to the COVID-19 outbreak? **Source:** GlobalWebIndex / Vimeo Study May 2020 **Base:** 1,191 U.S. business professionals whose leadership have been using video streaming for executive communication during COVID-19 and 797 U.S. business professionals whose leadership have not been doing so and whose companies have transitioned, to some extent, to remote working

Young professionals and the communication revolution

Another key aspect of the modern workforce is the influence of youth and their changing values. Millennials, for example, are predicted to **make up 75%** of the workforce by 2025. As this cohort matures, millennials will increasingly sit in positions of leadership, and major changes in work culture catalyzed by their unique values will become the norm. Among these is a revolution in how we communicate.

Unlike older generations, millennials — and now Gen Z — challenge the status quo of communication and authority. They've entered the workforce during the startup era, where leadership wears sneakers to work and traditional hierarchies are made to be broken. And, importantly, they've come of age alongside the development of the internet, social media, and video communication as standard. Information has been democratized beyond our

imaginings and our leaders are held to account by the voice of the masses.

Would we now expect any different from millennials when it comes to their demands in the workplace?

Millennial professionals are more likely than their older counterparts to say they want more frequent communication and, strikingly, significantly more likely to say that they want greater **transparency** from their leadership. More than any other medium, video allows both transparency and authenticity to shine through.

In a work revolution led by youth in the search for candor, the occasional email — or worse, no communication from leadership at all — simply won't cut it. The younger workforce wants a face to the message and, ultimately, a **more frequent message** to begin with. Companies must take note.

The future workforce demands greater communication and transparency

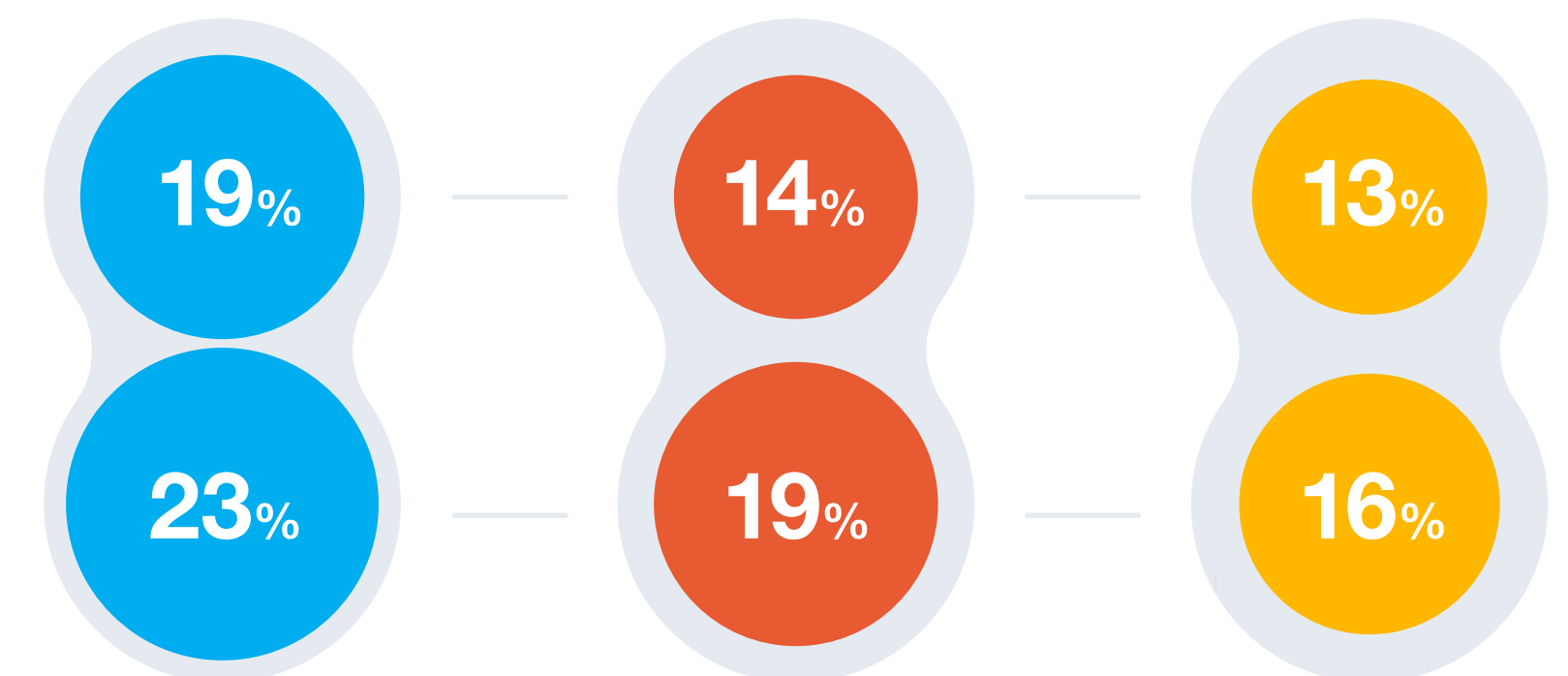
% of professionals who agree with the following statements regarding the state of their company during COVID-19

I want more frequent communication from my company's leadership

I want greater transparency from my company's leadership

Question: Considering the state of your company today during the COVID-19 crisis, which of the following statements do you agree with? **Source:** GlobalWebIndex / Vimeo Study May 2020 **Base:** 446 millennial + Gen Z (aged 18-37), 1176 Gen X (aged 38-56), and 553 Boomer (aged 57-64) U.S. business professionals

● Millennials + Gen Z ● Gen X ● Boomers



Older professionals now embracing video communications



While millennials are leading a communication revolution, our research reveals something unexpected: communication preferences are shifting dramatically for older groups in the wake of the pandemic, as well. The direction they are shifting in is, strikingly, toward video.

Among Gen X, only 18% reported that they had been regularly receiving video communication from their leadership pre-pandemic. Post-pandemic, that figure grew to 28%. An even more dramatic change occurred among baby boomers — with the number of boomers receiving strategic communications via video nearly doubling. Among millennials, this shift in video communications also grew, though less dramatically — from 31% pre-pandemic to 37% pre-pandemic.

Results like this beg the question, how can three different groups of professionals report receiving such varied amounts of video communication from their leadership

when, in all likelihood, they are working for many of the same companies?

The insight here lies in perception, and it tells a more compelling story. Younger professionals have always been more open to video communications, as younger people have grown up voraciously consuming video in their personal lives. While older professionals have been typically less engaged, COVID-19 changed this completely. As older professionals have been forced into using video communication to stay connected, their adoption and engagement has, comparatively, skyrocketed. They have opened up to video and, consequently, are seeing more and more of it than before.

For organizations, this makes a compelling case for video. Embracing executive video communication will give businesses an edge in attracting and retaining younger employees, while also catering to a shift among older employees who are increasing their consumption of video.

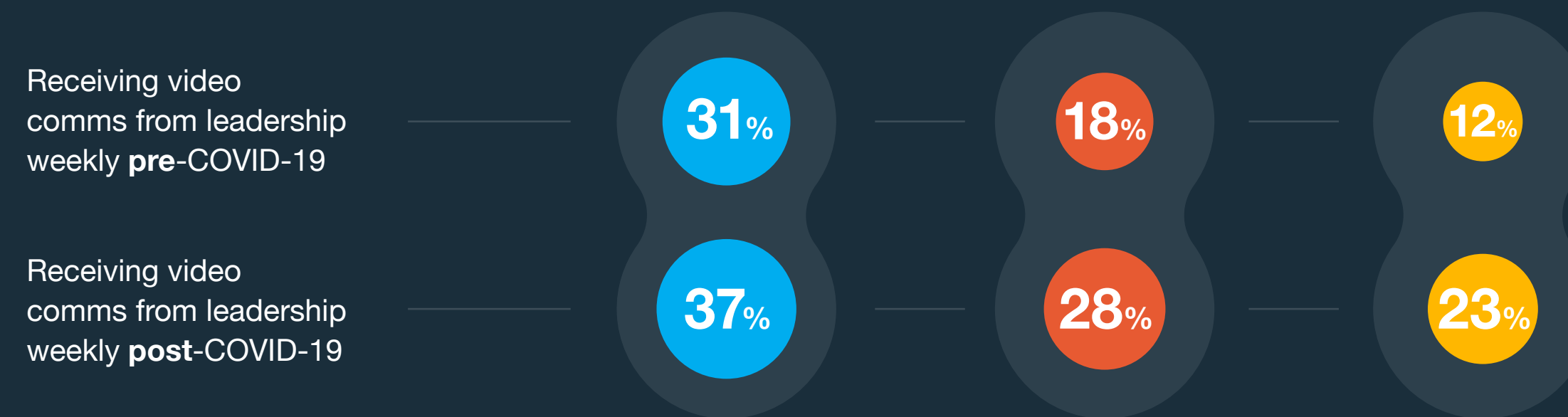
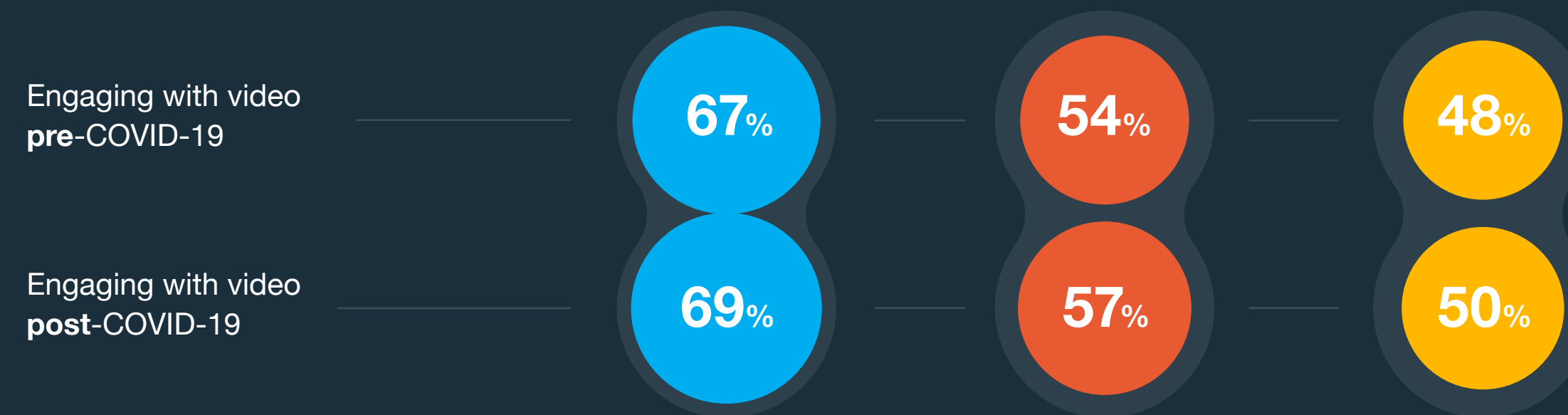


Personally I should have looked into how to record lectures and make videos years ago but didn't feel urgency and liked to stay "old school". I almost wish there had been a requirement for a certain amount of professional development in regards to communication tactics and options.

Video is embraced by the future of the workforce

% of professionals engaging with streamed video in their workplace

● Millennials + Gen Z ● Gen X ● Boomers



Question: Please think about all of the workplace communication you are now receiving on a daily basis via the following channels. How much of this communication would you say that you actively read / listen to / engage with? | How frequently would your company's executive/department-level leadership use the following channels to communicate major updates to the company (i. e. strategy updates, policy updates, townhalls)? **Source:** GlobalWebIndex / Vimeo Study May 2020 **Base:** 446 millennial + Gen Z (aged 18-37), 1176 Gen X (aged 38-56), and 553 boomer (aged 57-64) U.S. business professionals

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Chapter 03

How video can boost your KPIs

Improving collaboration, productivity, and other key metrics

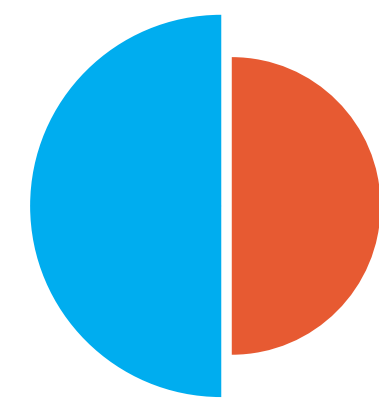
Our findings suggest that, among companies where leadership has embraced video, the positive effects on key performance indicators (KPIs) are already there. For example, employees at video-savvy organizations are twice as likely to rate their companies highly when it comes to collaboration, and 75% more likely to rate them highly on employee engagement.

Furthermore, metrics strongly associated with a company's financial performance also show stark differences between groups that are engaged vs. disengaged with video. In organizations where leadership uses video to stream corporate communications, employees are 72% more likely to rate productivity highly and 65% more likely to rate overall company performance / health highly vs. where they do not.

Video usage tied to better KPI scores (pre-COVID-19)

% of professionals who rated their companies' performance as "excellent" on the following metrics

● Leadership uses video ● Leadership doesn't use video



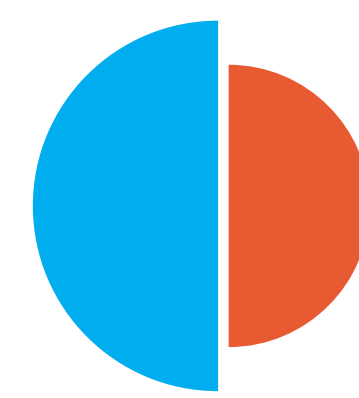
33% **20%**
Company performance & health



31% **18%**
Peer-to-peer communication



31% **18%**
Agility / keeping up with industry changes



31% **18%**
Employee productivity



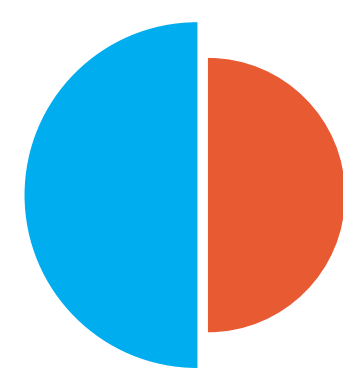
30% **19%**
Employee understanding of company goals, strategy, and performance



30% **15%**
Collaborative environment



28% **16%**
Employee engagement



27% **17%**
Capability / effectiveness of leadership



26% **15%**
Communication between leadership and staff



26% **13%**
Employee training, development, and knowledge sharing

Question: Thinking about your company prior to COVID-19, how would you rate it in terms of the following attributes?
: Excellent **Source:** GlobalWebIndex / Vimeo Study May 2020 **Base:** 1,242 U.S. business professionals whose leadership were using video streaming for executive communication pre-COVID-19 and 933 U.S. business professionals whose leadership were not doing so

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The impact of video communication in a crisis

We know that more frequent corporate communication is associated with a more productive and collaborative working environment under normal business conditions. But what about during a global pandemic? How much of an impact, if any, does having strategy updates streamed over video make in the grand scheme of a crisis?

As it turns out, quite a big one.

Not all organizations have embraced video for corporate communication during the pandemic. But among those that have, employees are much more likely to feel confident in their companies' ability to weather this crisis across all metrics of company health.

For example, where leadership has adopted video comms during the crisis, professionals are 67% more likely to feel confident about their companies maintaining good employee engagement, and 55% more likely to say the same in regards to maintaining a collaborative environment vs. where leadership has not.



Professionals are 59% more likely to be confident that their companies will stay profitable through the global pandemic in companies where video comms are used by leadership vs. not

For areas of more direct business impact, the effect is also profound. In video-savvy organizations, employees are 59% more likely to be confident that their companies can remain profitable and 40% more likely to feel that large-scale layoffs will be avoided. This is in comparison to those orgs that have not embraced video for corporate comms during the crisis.

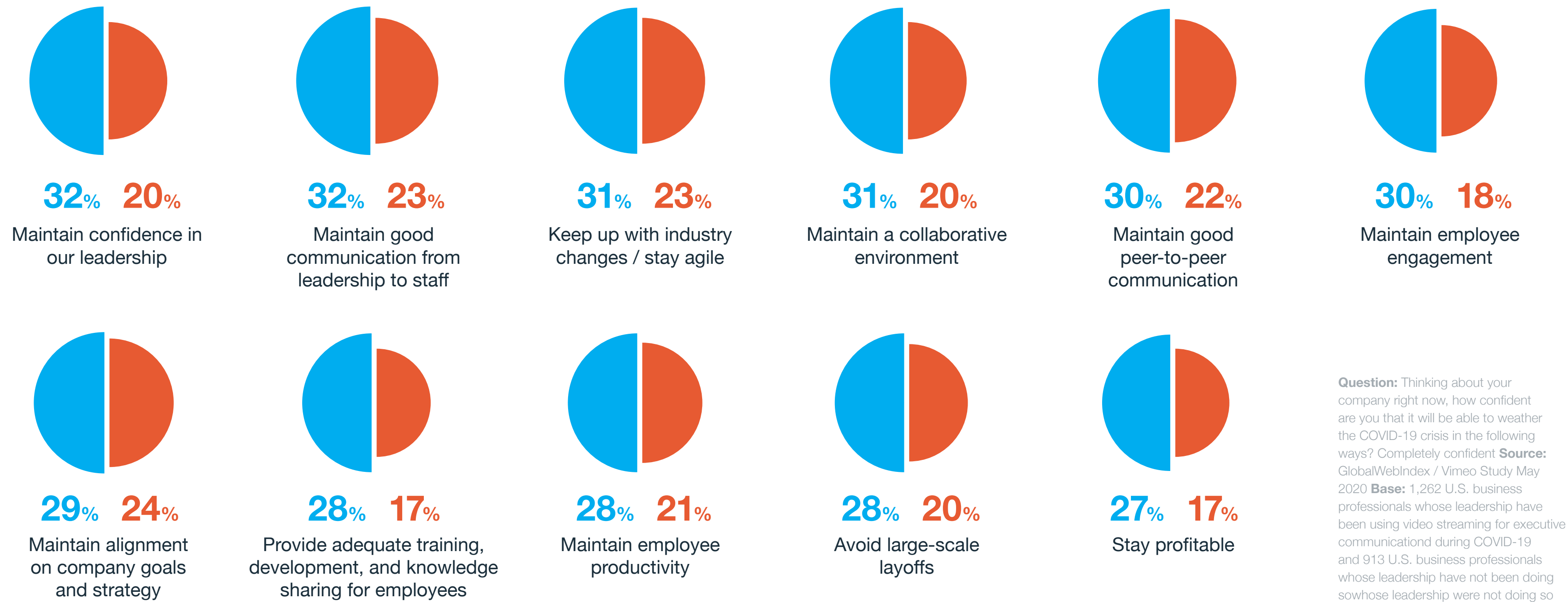
And while a video tool itself is not the be-all and end-all of company health, communication is at the heart of how businesses operate. Without strong, consistent, and clear communication, the infrastructure around our organizations can crumble. For businesses to thrive past this crisis, investing in a better way forward is crucial.

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Video usage tied to better KPI scores (post-COVID-19)

% of professionals who are completely confident that their companies can weather the challenges of COVID-19 across the following metrics

● Leadership uses video ● Leadership doesn't use video



Question: Thinking about your company right now, how confident are you that it will be able to weather the COVID-19 crisis in the following ways? Completely confident **Source:** GlobalWebIndex / Vimeo Study May 2020 **Base:** 1,262 U.S. business professionals whose leadership have been using video streaming for executive communication during COVID-19 and 913 U.S. business professionals whose leadership have not been doing so whose leadership were not doing so

“Corporate communications have made me feel more secure about our company making it through this and that my job will be secure. It’s been great to know where the company stands throughout these times.”

Mitigating the risks of an under-trained workforce

According to our study, 35% of HR professionals report that the global pandemic has made training and onboarding a significant problem for their companies. A further 43% report that it's become somewhat of a problem, yet is still manageable.

What's even more striking, however, is that over 1 in 3 HR professionals report that they have had to stop giving certain types of training entirely, feeling unable to find an effective alternative during lockdown measures. The implications for this are significant.

From a business perspective, the consequences of an under-trained

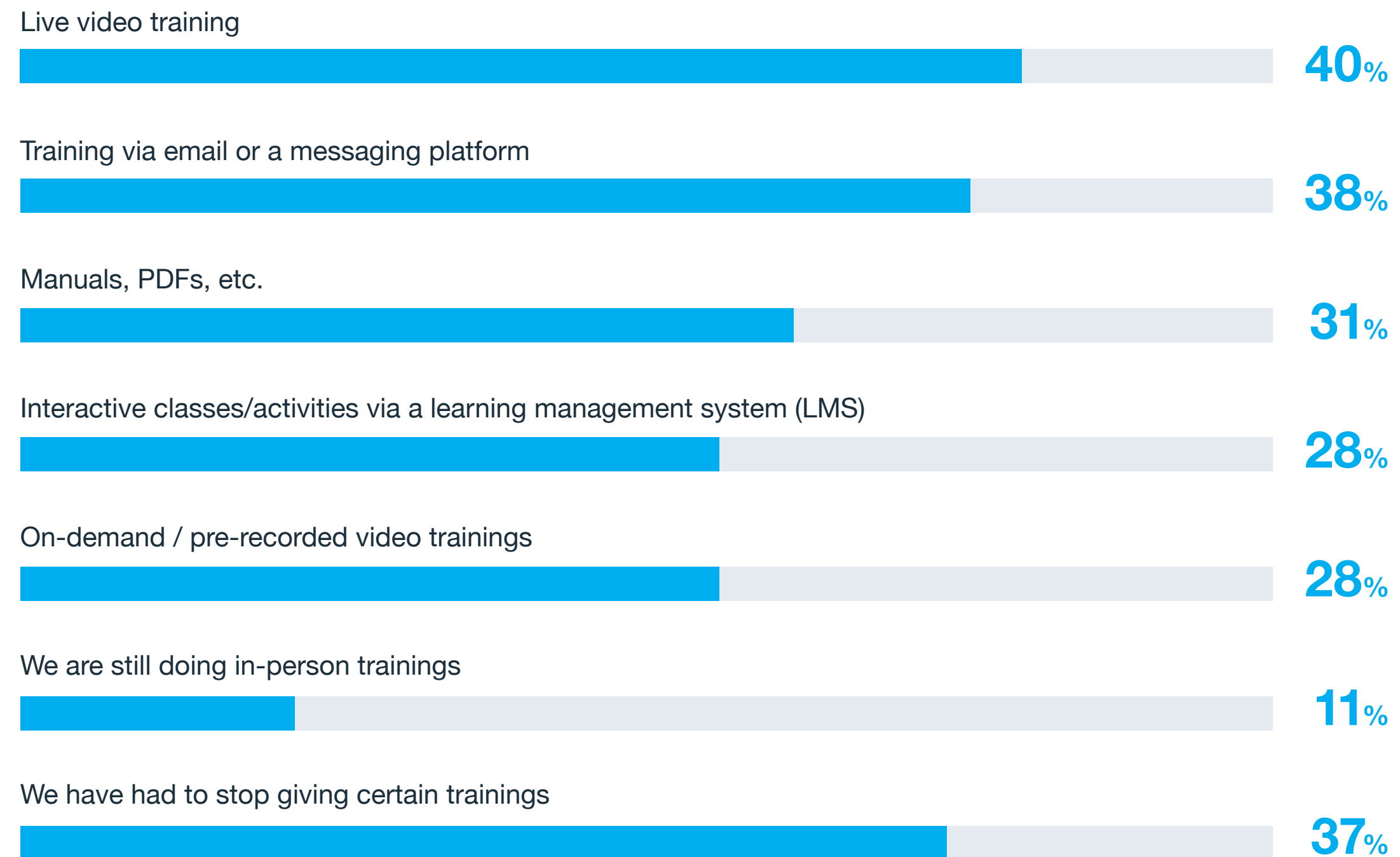
workforce can be incredibly damaging. In certain industries, there is an inherent public safety risk — think healthcare, manufacturing, and government. Making decisions without proper training in these fields can be disastrous. In others, such as financial and legal services, the risks of noncompliance are obvious and costly.

From an employee perspective, the long-term effects might be damaging in a different way. An entire cohort of young professionals will miss out on the crucial education needed to grow into management roles. If we ignore this obvious training gap, are we dooming young, ambitious people to become a "lost generation" in their career potential?

Over 1 in 3 HR professionals say their companies have had to stop giving trainings during the global pandemic

Video for training, onboarding, and knowledge sharing

% of HR professionals who report their companies have replaced in-person trainings with the following alternatives during the global pandemic



Question: In response to the COVID-19 crisis, has your company replaced what would normally be in-person training with any of the following alternatives? Please select all that apply. **Source:** GlobalWebIndex / Vimeo Study May 2020 **Base:** 245 U.S. HR professionals

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One thing we are exploring (had been considering before pandemic) is moving much of our procedures and expertise documentation to short videos ... We are going to try to move stores of knowledge into short videos as much as possible.

For HR professionals who have found alternatives to in-person training during the crisis, a key insight emerges. It's live video that they're turning to. Live video comes out as a winner for both scale of adoption and effectiveness. And HR professionals score live video as a more effective replacement to in-person trainings than any other formats — including traditional learning management systems (LMS).

There's a clear advantage, therefore, for businesses who do use video for training and learning. As we shift into the future of work, these businesses will have an edge over their competitors who continue to rely on older, less effective methods of training and knowledge sharing to empower their workforce.

HR Professionals find live video training to be the most effective alternative to in-person training

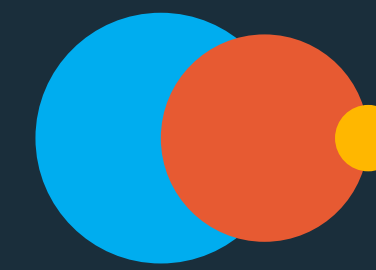
% of HR Professionals who find these alternatives to in-person training effective

● Effective ● Neither effective nor ineffective ● Ineffective



69% 24% 7%

Live video training



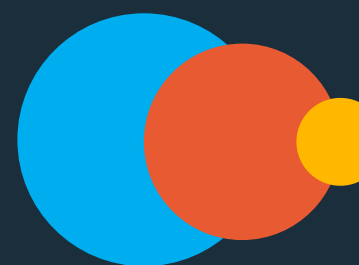
57% 39% 4%

On-demand / pre-recorded video training



64% 31% 5%

Interactive classes / activities via a learning management system



58% 35% 7%

Manuals, PDFs, etc.



67% 29% 4%

Training via email or a messaging platform

Question: How effective do you find the following alternatives to live training to be? Source: GlobalWebIndex / Vimeo Study May 2020 Base: 245 U.S. HR professionals

THIS SHOULD HAVE BEEN A VIDEO

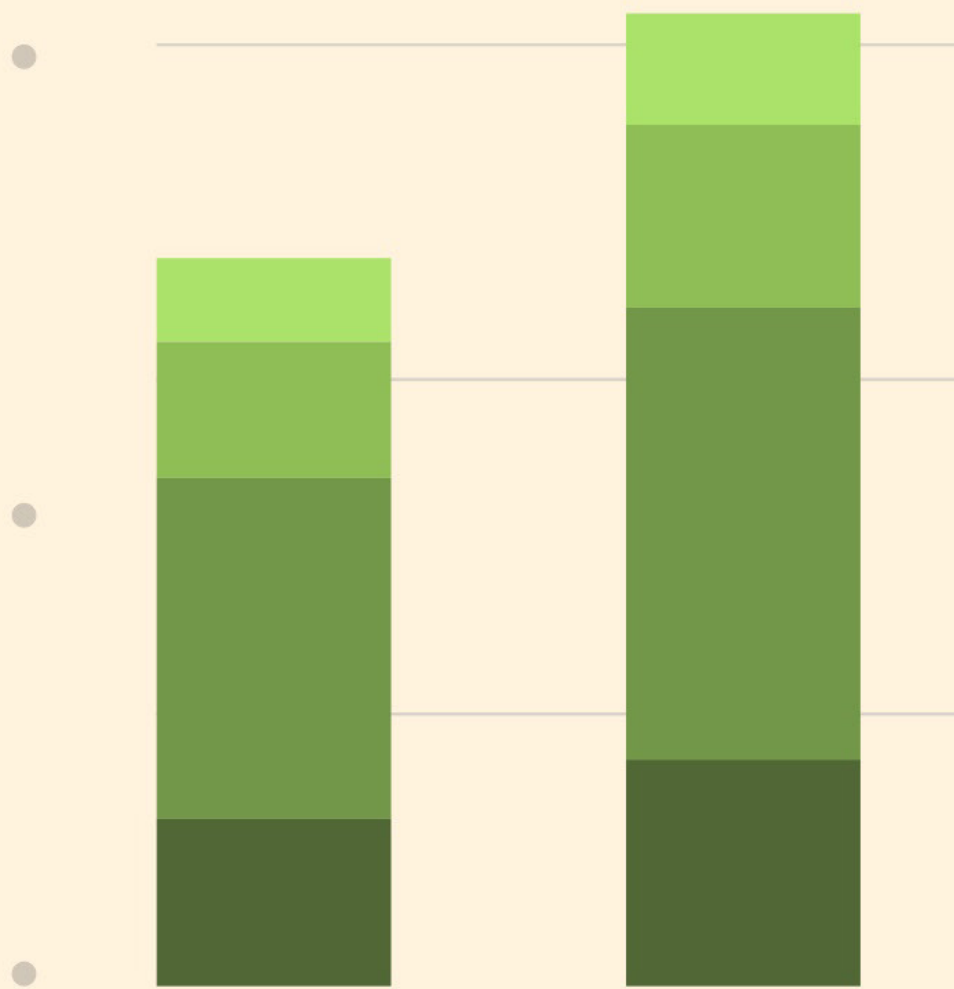


Weekly sales training

Samantha Goodman - Sr. Marketing Manager

LIVE 1.1k HD

Weekly sales Report



I prefer the real time video because it allows for a more personal connection to the subject matter. I understand that there will be times that you can't attend and then on-demand works best. A picture is worth a thousand words and that holds true for video as well.

In the next section, we'll further explore what's particularly special about live video, how greater candor and vulnerability can be beneficial, and why these are key to better communication in the future of work.

Chapter 04

Rethinking “executive presence”

While the message is critical, communication is about so much more than relaying information. Good communication tools can help us feel more connected to people. And when it comes to corporate communication, building these connections is where video makes the biggest impact. We'll explore how video humanizes our leadership in this section and why, for young professionals, this effect is especially powerful.



We have been getting weekly updates from the CEO via video. Those have been nice as it seems more personal than a memo and more details can be relayed in a quick 5 minute video over a long memo.

Authentic digital communication for the young workforce

In-person interactions are becoming less and less important for millennials in the workforce, and even more so for the generations that will come after them. This is not exclusive to worklife. Younger people's discomfort with in-person communication, be it ordering a pizza or going to the post office, has been well-documented. It's the inevitable consequence of our tech-first society.

Our research offers a window into how this plays out at work today.

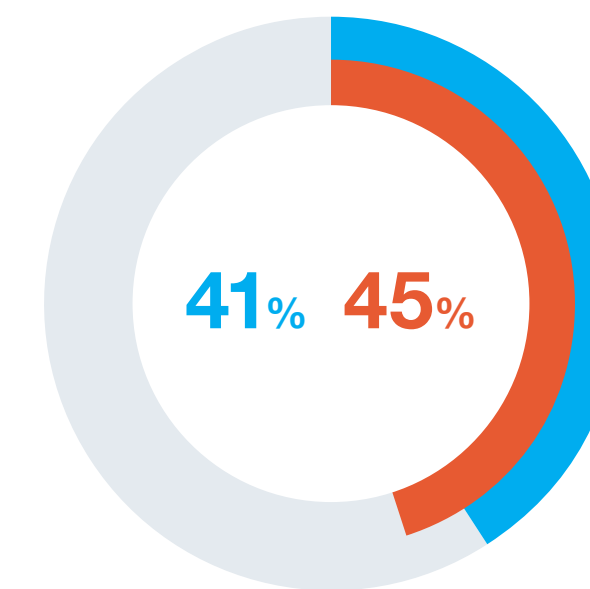
Only 41% of millennials and Gen Z professionals say that in-person meetings / communication make them feel like their leadership cares about its employees. This is compared to 52% of Gen X and 54% of boomers. Similarly, boomers are 38% more likely than millennials and Gen Z professionals to say that in-person communication makes leadership feel more approachable.



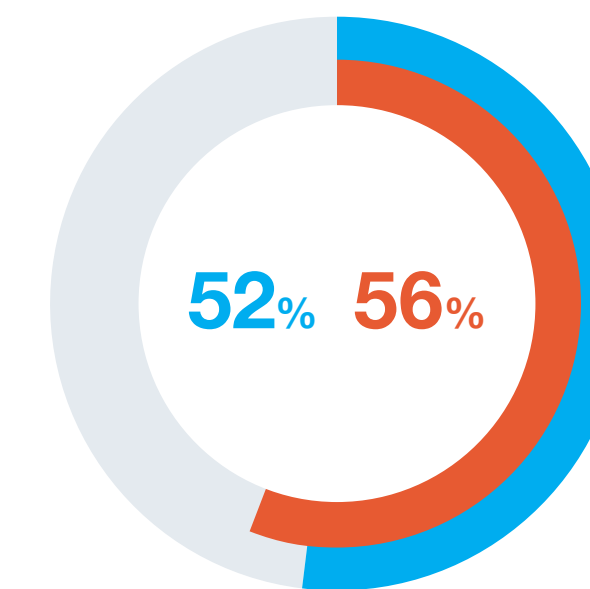
For the younger workforce, interpersonal ways of connecting are becoming less meaningful

% of professionals who say in-person meetings / communication with leadership make them feel like leaders...

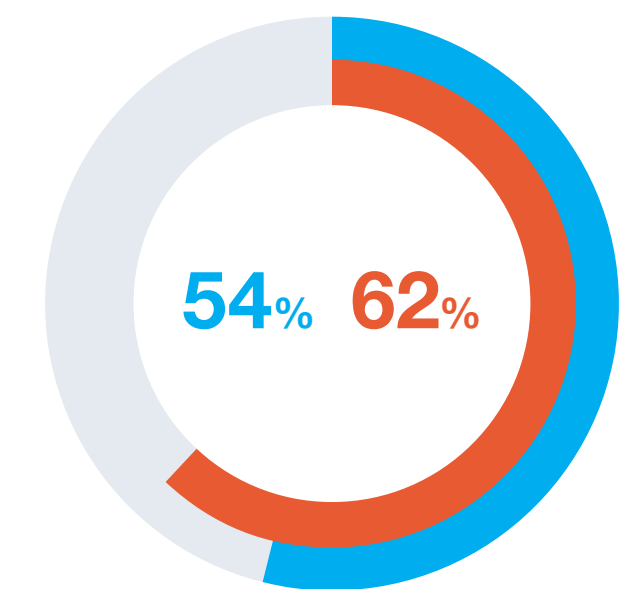
- Care about all of their employees
- Are approachable



Millennials + Gen Z



Gen X



Boomers

Question: Thinking about the communication channels your company leadership has ever used, which of these do you find to be the best at: making you feel like your company's leadership cares about all employees? / making you feel like your company's leadership are people you could approach / talk to? **Source:** GlobalWebIndex / Vimeo Study May 2020 **Base:** 446 millennial + Gen Z (aged 18-37), 1176 Gen X (aged 38-56), and 553 boomer (aged 57-64) U.S. business professionals

THIS SHOULD HAVE BEEN A VIDEO



Weekly Marketing Report

Peter KHAN - Sr. Marketing Manager

LIVE 1.1k

globalwebindex.com



Weekly updates and communications contributed to confidence in my organization. Transparent information disseminated to employees helped to alleviate anxiety and at least gave me a sense of confidence.

A clear dichotomy exists here, and one that video communication can help businesses address.

Young professionals want transparency and authenticity from their leaders, this much is obvious from our earlier findings. Yet, at the same time, they don't see

in-person interactions as providing either of those things — at least not to the extent of their older colleagues. How can leaders connect with the younger workforce, who both demand authenticity yet dismiss the traditional ways in which it is nurtured at work? Video emerges as the solution.

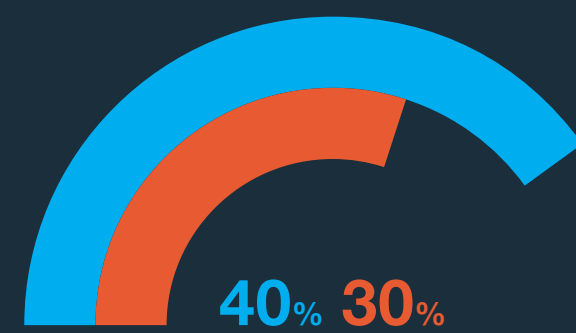
Video can cement feelings of alignment

Video can cement feelings of alignment and security

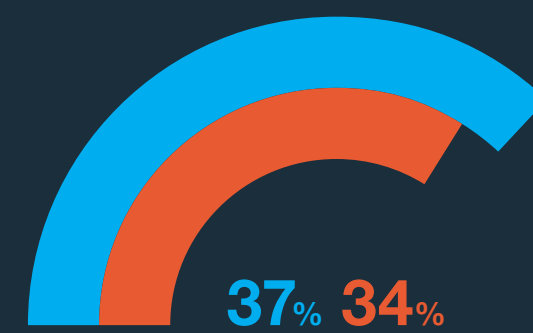
% of professionals who agree with the following statements regarding the state of their company during COVID-19

● Leadership using video

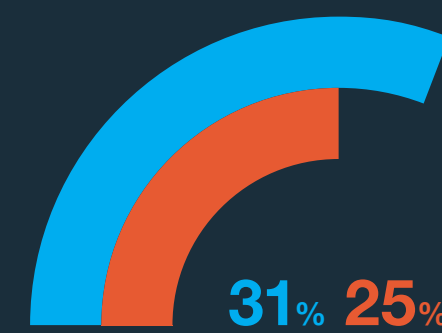
● Leadership **not** using video



I am aligned with my company's goals



I feel connected to my co-workers



I feel like I'm being looked after

When we see our leaders as people we can connect and relate to, we are able to feel a greater sense of cohesion and security. Humanizing executive leaders builds trust and alignment with management in the best of times. In a time of crisis, it is essential.

According to our research, executive leadership that embraces video for corporate communication is able to achieve these humanizing effects much better than those who do not.

Where leadership embraces video, employees are 33% more likely to feel

aligned with their company's goals vs. in companies where leadership does not. Professionals are also more likely to feel connected to their coworkers in companies that are video-savvy, and have a stronger sense of being taken care of.

Question: Considering the state of your company today during the COVID-19 crisis, which of the following statements do you agree with? **Source:** GlobalWebIndex / Vimeo Study May 2020 **Base:** 1,262 U.S. business professionals whose leadership have been using video streaming for executive communication during COVID-19 and 913 U.S. business professionals whose leadership have not been doing so.

As most executives know, employee engagement is one of the hardest measures to improve — often requiring significant effort, time, and resources. If something as simple as changing the medium through which you communicate can move the needle by ten percentage points, isn't it worth a try?

THIS SHOULD HAVE BEEN A VIDEO

Video-engagers felt more connected to their colleagues than non-engagers, even before COVID-19

% who rank their company as good or excellent in terms of the following attributes

- Engaged with video pre-COVID-19
- **Not** engaged with video pre-COVID-19

Peer-to-peer communication



Collaborative environment



Employee engagement



Question: Thinking about your company prior to COVID-19, how would you rate it in terms of the following attributes? : Good, Excellent **Source:** GlobalWebIndex / Vimeo Study May 2020 **Base:** 1,172 U.S. business professionals who had been consuming video streaming content prior COVID-19 and 1,003 U.S. business professionals who had not been doing so

Embracing the new “executive presence” on video



As we touched on in the last chapter, there is something unique about live video. It enables us to see people as they really are, stripped of the polish, filters, and scripting. And this is part of what creates that sense of connection; the live-action, “anything could happen” quality of video offers something that is reminiscent of real life. And this is an important quality.

For those who are in the spotlight, it might also help explain some of the anxieties that come with being on video.

Among most business professionals, the biggest issues they find with video communication tools are technical. For executives, however, a different story emerges, one of surprising self-consciousness.

22% of executives report getting distracted by their own image in the corner of a video call vs. only 9% of general professionals. And tellingly, execs are nearly five times as likely to be worried that their tone does not come across in the right way vs. all professionals.



The CEO weekly updates made me feel confident in the future due to the more personal nature compared to a memo, and they seemed pretty positive throughout all things considered.

THIS SHOULD HAVE BEEN A VIDEO

Video reveals our insecurities

% of professionals and executives who report the following issues with videoconferencing tools

● All professionals ● Executives



Question: Thinking about web conferencing tools, both pre- and post-COVID, what would say are the biggest problems you experience with this?
Source: GlobalWebIndex / Vimeo Study May 2020
Base: 2,175 U.S. business professionals and 122 U.S. business professionals responsible for executive functions

Executives are nearly 5x as likely as the non-executive employee to be worried that their tone doesn't come across right on video

While executives are often quite comfortable speaking to large audiences in person, there's something different about going on video. Perhaps it's the lack of immediate, obvious feedback via microexpressions and body language. Perhaps it's also that communicating on video, especially in the conditions of the pandemic, strips away so many of the comforts that we associate with "executive presence."

There are no office props and no physical space to take up. On the contrary, there is the innate vulnerability that comes with giving people a window into your life, of perhaps seeing your children, spouse, or pets walk into view. While this has shaken many executives, it will ultimately be a good thing for their relationship with their staff.



This may seem silly, but there is something about seeing folks dressed a little more casually on camera — I think it gives a more informal, "we're all in this together" sort of vibe. It's also nice just to see your coworkers every once in a while, since we haven't been in the same spot together in nearly four months.

Chapter 05

Your organization, through the lens

THIS SHOULD HAVE BEEN A VIDEO

To adapt or to be left behind

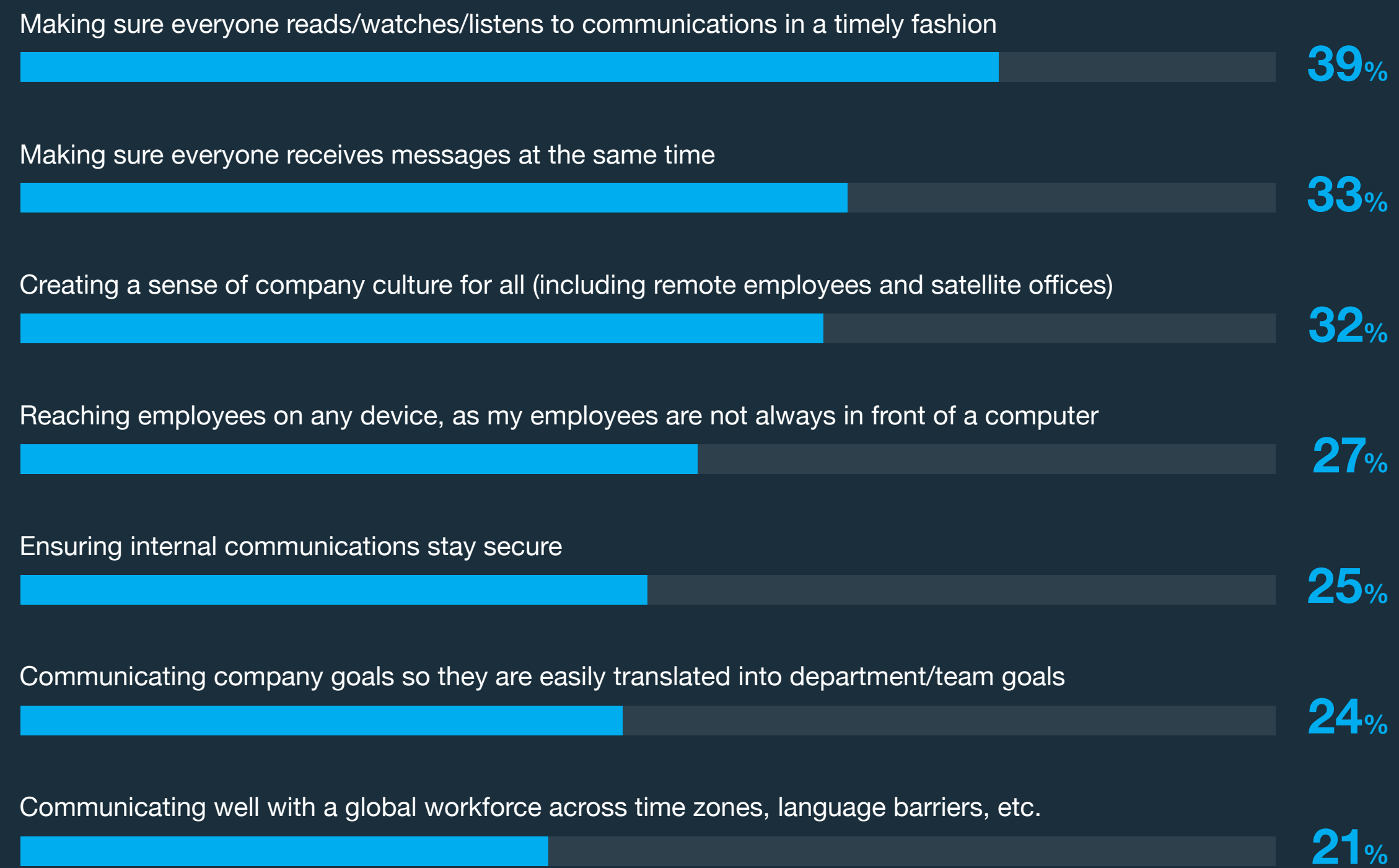
As we hurtle toward the future of work, the ultimate decision for businesses becomes one of adapting or being left behind. But what does being “left behind” look like when it comes to how we communicate? Findings from our study offer a window into this reality, revealing to us that the struggles of today will likely become insurmountable in the future if companies don’t embrace better strategic communication.

According to our research, nearly 40% of executives and management are concerned with employees reading, listening to, or watching critical communication in a timely fashion. And one-third of them are having trouble using communication to create an inclusive culture for everyone. If this is the state of workplace communication today, it does not bode well for a reality where half of the workforce — if not more — is distributed around the world.

Nearly 1 in 3 managers / execs say that it’s harder now to keep employees informed about company goals and strategy

Top challenges for corporate communication

% of management who report the following communication challenges



Question: What are the challenges you face when communicating major updates, both pre- and post-COVID, to your employees? Please select all that apply. **Source:** GlobalWebIndex / Vimeo Study May 2020 **Base:** 538 U.S. business professionals responsible for executive, strategy, and/or management functions

THIS SHOULD HAVE BEEN A VIDEO



The global pandemic has given us a glimpse into what being “left behind” really looks like, and it emphasizes the need for modern, video-first corporate communication.

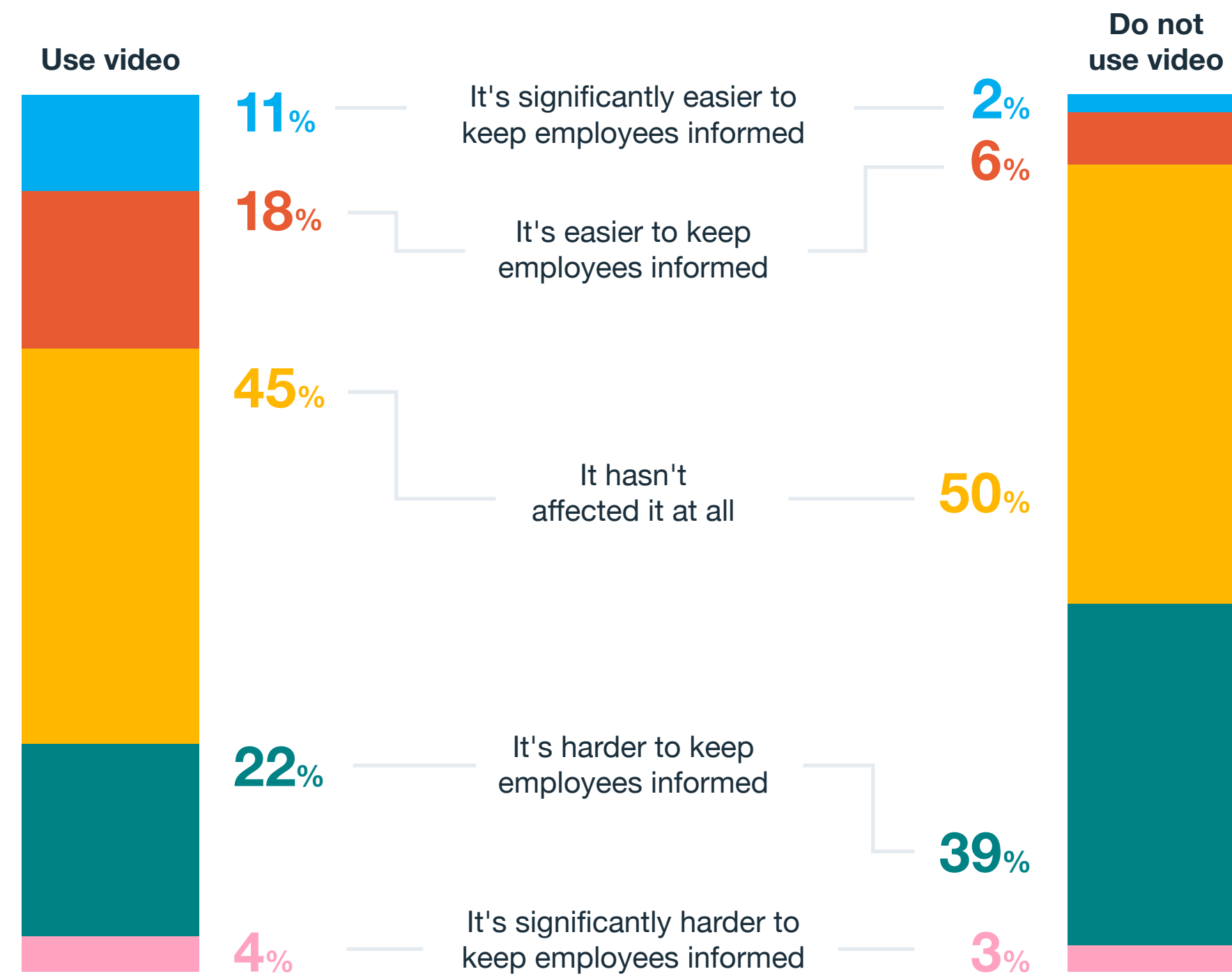
In organizations that embraced video before the crisis, management had a much better perspective on their employees’ alignment. Only 26% of these managers reported that, post-

crisis, it had become harder to keep their employees informed about key strategic updates. This is compared with 42% of managers in companies where video was not adopted.

Misalignment and a disengaged workforce are big risks. But by adopting video successfully, from the top, companies need not risk either.

Adopting video early on makes the difference

% of management who think it is easier vs. harder to keep employees informed on company goals/strategy during COVID-19



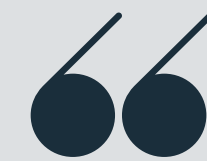
Question: How has the COVID-19 crisis affected your ability to keep employees informed on company goals/strategy? Please select the option that best applies
Source: GlobalWebIndex / Vimeo Study May 2020
Base: 538 U.S. business professionals responsible for executive, strategy, and/or management functions

What does success look like?

So what does successful integration of video communication look like for your business? Some best practices, according to the voices of employees we surveyed, include the following:

01 Maintain regularly scheduled programming

Frequency and predictability is a hallmark of effective video communication. Regularly scheduled video programming allows employees to build the time into their schedule, and solves issues of asynchronous messaging that leaves part of the workforce in the know and others in the dark. Consider setting a regularly scheduled time every month, bi-weekly, weekly, or even daily depending on the needs of your business. At the height of the pandemic, [Edelman's survey](#) showed that a majority of employees wanted to hear from their employers every day.



What has been most successful in the corporate communications is in actually sending them at regular intervals — I did not always feel like we were updated on things going on company-wide before the pandemic. They are usually brief and to the point, with links to more information if needed.



02 Keep videos short, sweet, and digestible

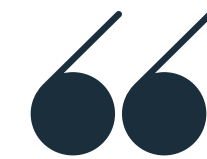
If your company leadership is challenged, like so many others, to communicate effectively via video, one key tactic that will increase the comfort level is having a tight plan and sticking to it. You may also find that video communication condenses the time you might typically invest in an all-company communication. Your audio conference or in-person meeting may have been an hour previously. Now a 15 minute video address may accomplish the same thing.



My company has a weekly 1/2 hour meeting every Friday to review what's going on with the company and the office. It has been helpful to be in touch with my co-workers.

03 **Keep it simple**

Find ways to simplify and consumer-ize the employee video experience. Far too many video communications do just one thing well, or prioritize administration over ease of use. Employees expect to experience the same Netflix-like quality, viewing experience, and ease of use that they have come to expect in their lives outside of work. Removing friction to video consumption at work will boost its efficacy.



It is honestly all kinds of frustrating because we no longer have any uniformity. Any given meeting can be executed on one of 5 platforms! Every person has a different preference and every application has different strengths and weaknesses. I would just honestly prefer to be all aligned on one, and hope that we can do that as we transition into the “new normal” of more remote work for our company.



04 **Your vulnerability is a strength, not a weakness**

Work-life in the global pandemic has shown us that now, more than ever, we need to rethink “executive presence.” Employees want to see their leaders as real, accessible people who they can trust during a crisis. Embracing vulnerability and imperfections works to build those authentic connections.

05 **Think beyond the town hall**

In the immediacy of the global pandemic, all company communications were prioritized by many businesses. The gaps in training, onboarding, and employee development have been slower to emerge, but may have longer lasting effects, particularly for companies that have ceased training workers altogether. A shift from in-person to video communications can help new employees ramp up faster and facilitate critical knowledge transfer, even when the majority of the workforce may be working from home.

THIS SHOULD HAVE BEEN A VIDEO

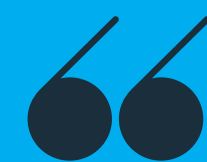
Looking forward

Our research has shed light on a few things. A clear communication breakdown is occurring within organizations in the U.S., especially between executives and their employees. This is not sustainable, not now, and certainly not for the future of work. But there is a way forward.

Embracing video for strategic communication can have powerful effects on employee engagement, training, collaboration, productivity, and many other key attributes of good business. What's more, it tethers people together — and to their leaders, to their company's strategy, and to its future — at a time when that is more crucial than ever before. Work is changing, perhaps forever, and it's time for the way we communicate to change, too.



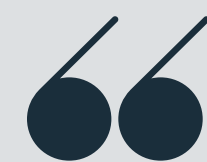
I think we will keep using video meetings and collaboration into the future. As a worldwide company, its already being done extensively. I think now and in the future, people will have to get used to more people working remotely for various reasons.



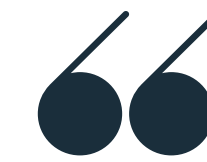
The adjustment to the “new normal” isn't over, it's an ongoing thing.



This has made my function better and added a quality of life improvement. I think this will....become an important benefit for future workers.



I think that what we see now during the pandemic is the future. They may come out with better feature rich apps, but remote work as the norm is here to stay.



Even once back in the office, I think it will continue to be used heavily because there is some “noise” being made about having hybrid employees (that work from home part time) as well as allowing a lot more people to go full time work-from-home.

Methodology

The data in this report is taken from a mix of sources, with these sources stated at the bottom of each chart. Most of this report draws on data from a joint study conducted by GlobalWebIndex and Vimeo, which included both a quantitative survey and a moderated qualitative online community.

Quantitative Study

The quantitative survey portion of this study was conducted among 2,175 business professionals in the U.S. aged 18+. To qualify for our study, respondents must have been employed full time for companies of at least 500 employees. We set minimum quotas for employees involved in HR functions and those in executive or management functions, achieving a final sample of 245 HR professionals, 538 management-level professionals, and 122 true executive professionals.

Fieldwork for this study was conducted online in May 2020.

Qualitative Study

The qualitative portion of this study was conducted among 24 business professionals in the U.S. aged 18+. Qualitative participants were recruited and recontacted from the initial quantitative survey, and participants qualified for the study based on their responses to the survey. We recruited equal proportions of video engagers (those who had actively been using streamed video communication at work both pre and post-COVID-19), video adopters (those who had not previously used streamed video communication at work pre-COVID-19 but had adopted it post-COVID-19) and video disengaged (those who had not used nor adopted streaming video at work).

The qualitative study consisted of a moderated online discussion community, blended with independent activities and interviews. Fieldwork was conducted in June 2020 and spanned across 5 days.

Additional Data Sources

Where labeled, sections of this report also draw on the first wave of GWI Work, GlobalWebIndex's online research among business professionals. Please

note that we only interview respondents aged 16-64 and our figures are representative of online business professionals of each market. Data from GWI Work, as referenced in this report, was fielded and released in 2019.

Each year, GlobalWebIndex interviews 17,000 business professionals aged 16- 64 across 10 markets (U.S., UK, France, Germany, Spain, Singapore, Japan, India, Brazil, Australia). Respondents complete an online questionnaire that asks them a wide range of questions about their professional lives, the companies they work for, and their relationship with technology in a work context. Additionally, our recontact methodology of surveying allows us to link these business professionals with their responses on our Core Survey, giving us further insight into their personal lives, lifestyles, and digital behaviors as consumers.

We source these respondents in partnership with a number of industry-leading panel providers. Each respondent who takes a GlobalWebIndex survey is assigned a unique and persistent identifier regardless of the site/panel to which they belong and no respondent can participate in our survey more than once a year (with the exception of internet users in Egypt, Saudi

Arabia and the UAE, where respondents are allowed to complete the survey at 6-month intervals).

For an in-depth explanation of GlobalWebIndex's research and methodology, including information on our country coverage, internet penetration rates, our sample structures, and much more, please [click here](#).

About Vimeo

Vimeo is the world's leading professional video platform and community. With over 175 million members across more than 150 countries, we help anyone grow their business by making it easy to create and market high-quality, impactful videos. Vimeo is headquartered in New York City with offices around the world, and is an operating business of IAC. Learn more at www.vimeo.com

