



Survey Finds Government Employees Favor Zoom

A survey, commissioned by Zoom in November 2021¹, indicates that select federal, state, and local employees have a favorable view of using Zoom.

The Zoom view

Government operations are not the same as 10 years ago, or even five years ago. As the public became more digital, many agencies had to find a way to help keep pace and opt for progress instead of relying on analog devices and legacy processes.

To serve this new online public while tackling mission-critical challenges, government agencies across the country embraced a new era of digital transformation, which was only catalyzed by recent widespread remote work.

With virtual collaboration at the heart of this digital transformation, video communications providers acted as linchpins for government organizations' everyday operations. But with the adoption of video conferencing came questions around implementation:

- How exactly do government workers use video communications in their day-to-day work?
- Which platforms do they prefer, and why?
- Which video communications platforms are used for certain tasks?

To dig into these questions, we commissioned a survey of 300 U.S. federal, state, and local government employees that use audio and video communication platforms in a work setting at least once a month, and we learned a lot based on the results. According to the survey, most of the government employees surveyed believe audio and video communication platforms will play a big role in both the government overall (**84%**) and their individual jobs in the future (**77%**). And the future may be a bit more flexible as a result – the majority of those surveyed (**78%**) agreed that audio and video communications have made working remotely easier for them.

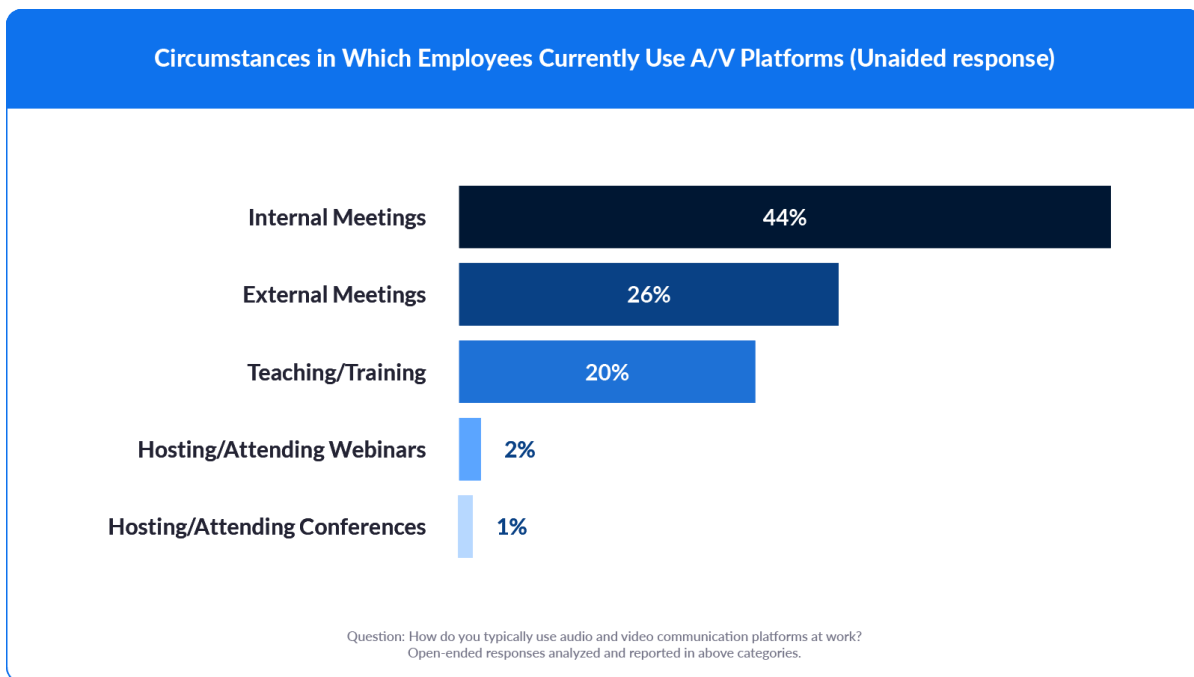
We discovered that the government employees surveyed would prefer to use Zoom over other platforms under several circumstances – more than half of those surveyed would prefer to use Zoom for presenting to a live audience (**56%**) and over a third would prefer it for holding a confidential meeting (**39%**). In fact, when asked what single platform they'd choose to use at work, nearly half (**47%**) of the government employees surveyed said Zoom.

But popularity wasn't the only trait associated with Zoom. Ease of use and high-quality audio and video, followed by reliability, were most important to those surveyed – traits that more respondents believed Zoom possessed across the board compared to other providers.

Read on for a more in-depth look at the survey findings.

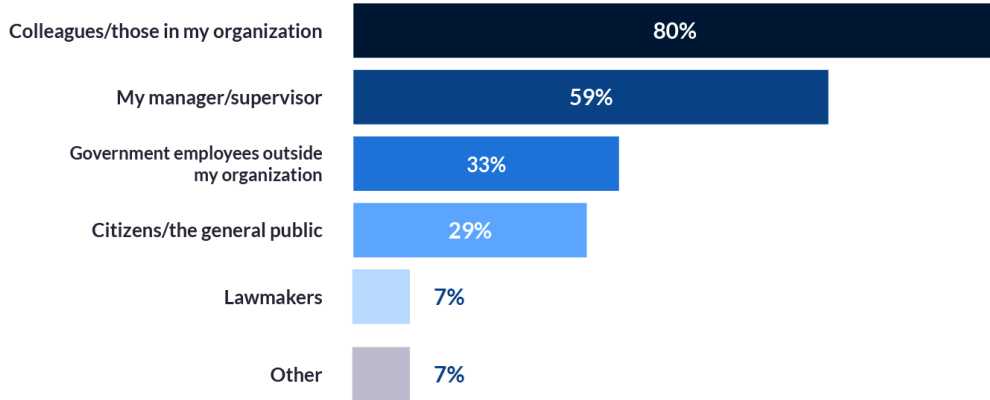
The popular way to collaborate? Video

The modern public sector is [embracing working trends](#) emerging across other industries – reducing costs and redundancies with technology, enabling a distributed workforce, and extending constituent outreach through virtual means. As such, audio and video communications technology has played a role in turning these trends into a reality. In fact, when asked how they typically use this technology, **44%** of those surveyed reported it was for internal meetings.



Many survey respondents said they use the technology for both internal and external communications, connecting with colleagues, members of other agencies, and the public. Of those surveyed, the majority (**80%**) use the technology for connecting with colleagues, and approximately a third use it for connecting with government employees outside their organization (**33%**) and with citizens/the general population (**29%**).

Who Government Employees Communicate With via A/V Platforms

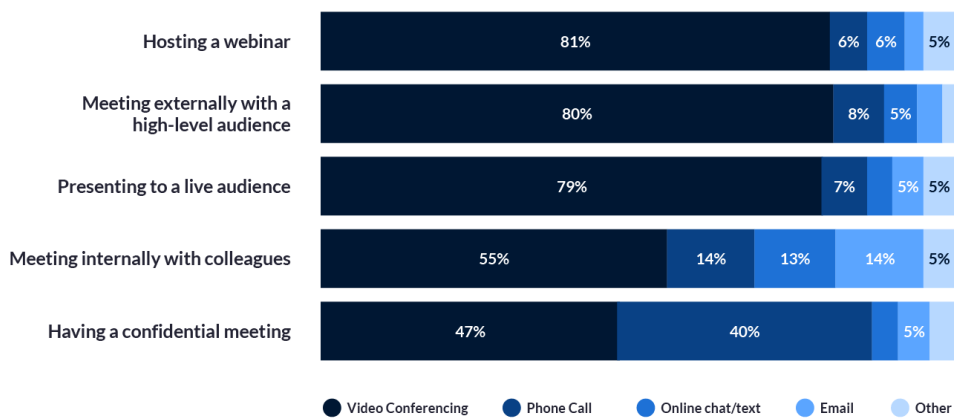


Question: What types of people do you communicate with via audio/video communication platforms in a work setting? Please select all that apply.

One minute government employees may be presenting to a live audience, the next they may be holding a highly confidential meeting. Tasked with a wide range of responsibilities, government workers in the digital age have developed preferences around which medium they prefer for certain communications. While phones and online chat are prevalent among the responses, those surveyed would prefer to utilize video communications for key government tasks when meeting in person is not possible.

When in-person communication is not available, most of the people surveyed prefer to use audio and video communications for hosting a webinar (**81%**), meeting externally with a high-level audience (**80%**), and presenting live to an audience (**79%**), while almost half rely on video conferencing for having a confidential meeting (**47%**). Phone comes in second for confidential meetings (**40%**), reflecting continued confidence in voice solutions.

Preferred Communication When In-Person Is Not Available



Question: When meeting in person is not possible, which of the following virtual communication options do you prefer to use in each circumstance?
*Percentages may not total 100 due to rounding

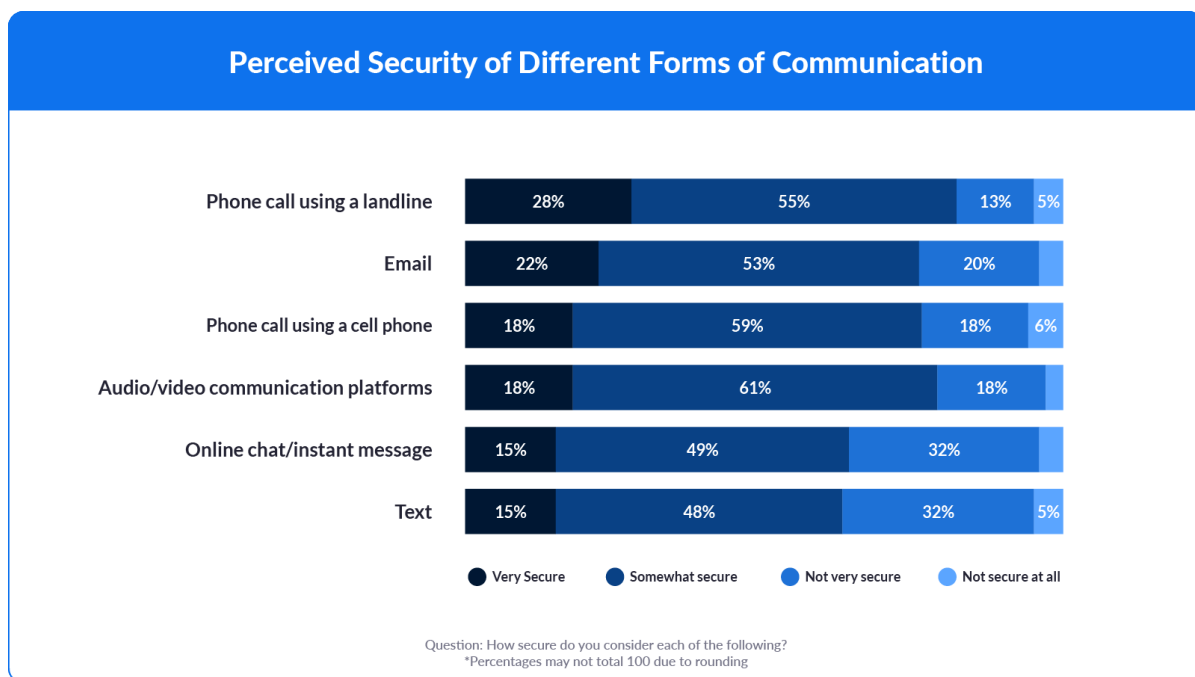
The benefits of video communications

Audio and video communications platforms' meteoric rise over the past few years has caught everyone's eyes, and the public sector is no exception. As people got a taste for audio and video communications, they developed opinions and preferences about the technology, which the Morning Consult survey sought to capture. The results reflect how the workers surveyed view audio and video solutions as related to productivity, engagement, and more.

It's probably no surprise that the survey found that the majority of government employees surveyed feel that using audio and video communication tools when working remotely helps strengthen the way they work.

- **59%** feel more productive
- **55%** feel more connected to those they're speaking with
- **55%** feel it is easier to convey their thoughts
- **52%** feel more engaged
- **49%** feel that they're making a bigger impact than if they were not using video communications

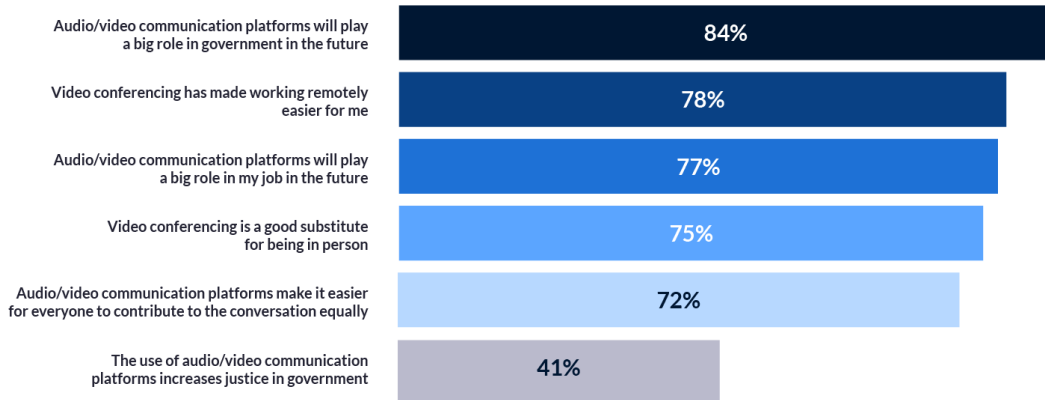
The research also shows that **79%** of those government employees surveyed consider audio and video communications technology to be very or somewhat secure. Audio and video platforms follow closely after "Phone call using a landline" as the form of communication respondents perceived as secure.



While video communications became more prevalent with the sudden onset of widespread remote work, the research demonstrates it's here to stay. In fact, the majority of government workers surveyed (**84%**) see audio and video technology continuing to play a pivotal role in their line of work in the future, with many believing it will impact their specific job function in the future as well (**77%**).

Its longevity could be chalked up to a few key aspects, but accessibility is likely one of the key reasons audio and video communications have a foothold within the public sector. The Morning Consult survey revealed **72%** of respondents believe audio and video communication platforms make it easier for everyone to contribute to the conversation equally.

Sentiments Toward A/V Platforms and Video Conferencing



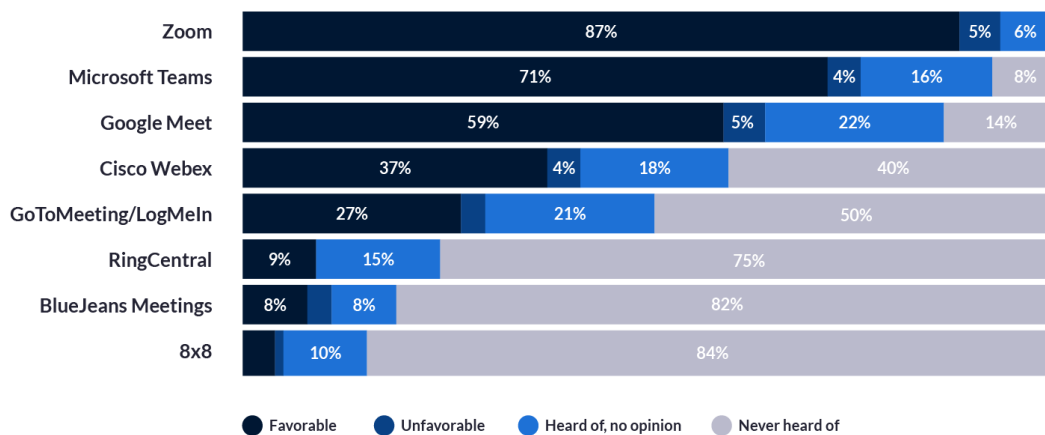
Question: How much do you agree or disagree with the following statements? (% agreeable)

Which provider do you like?

As audio and video communications became more and more commonplace in everyday government operations, people often kicked off collaboration with the question: which video communications platform do you know about and like to use?

The Morning Consult findings revealed that **87%** of respondents felt favorable toward Zoom.

Favorability

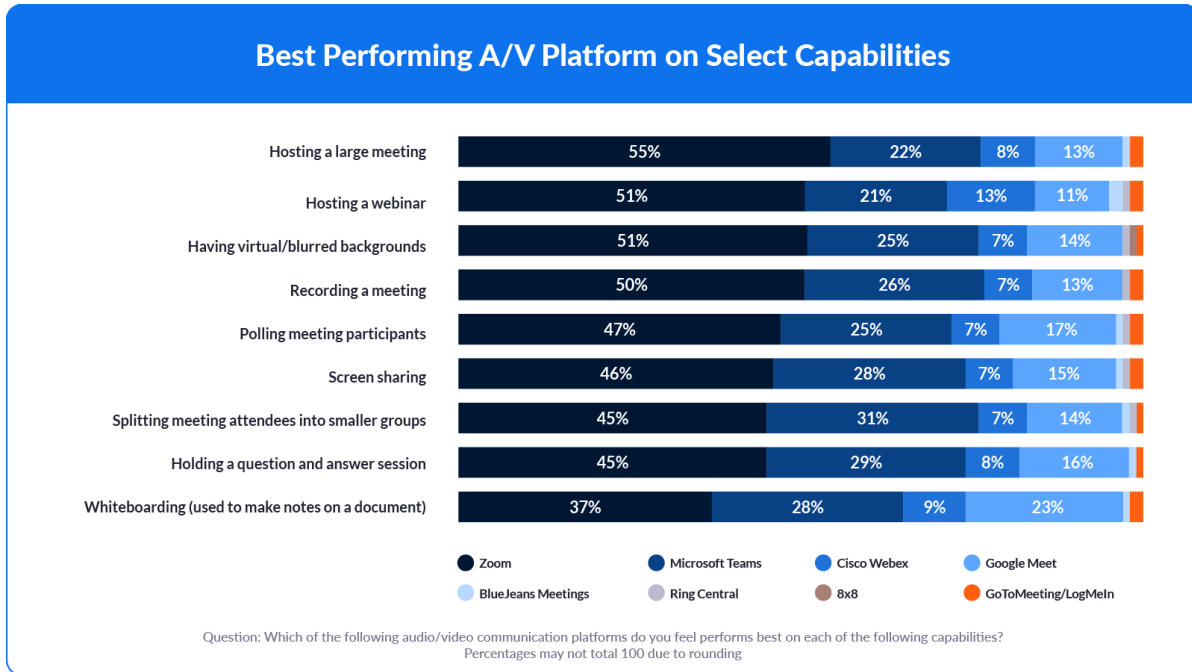


Question: How favorable are you toward the following? (% favorable)
Percentages may not total 100 due to rounding
Favorable percentage includes respondents selecting very or somewhat favorable

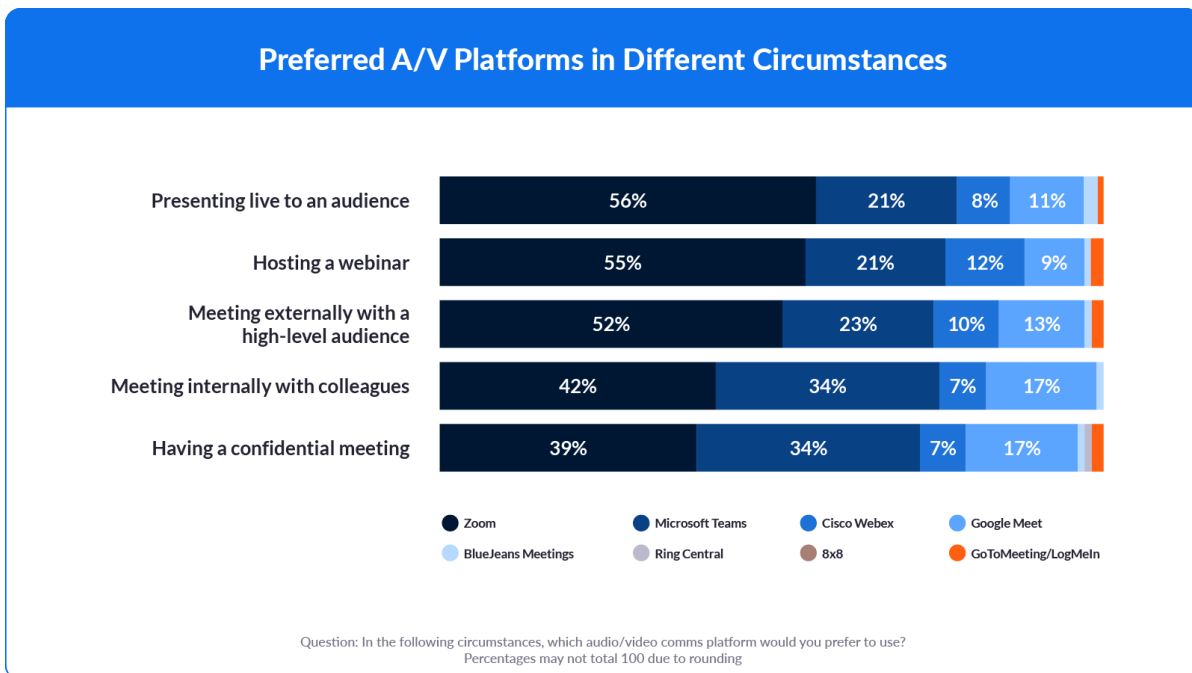
Now, what's driving government workers' favorable opinion of Zoom? Is it because it's better for hosting a large meeting or webinar, its recording capabilities, or even its whiteboarding feature? Survey says: all of the above, and then some.

Respondents believe Zoom performs better than other platforms included in the survey on certain key capabilities — all of which were included in the Morning Consult study, in fact.

Fifty-five percent of respondents like to host large meetings on Zoom. **Fifty percent** like using Zoom to record meetings, **46%** prefer Zoom for screen sharing, and **45%** like to use Zoom when splitting meeting attendees into smaller groups.



Whether the government employees surveyed are presenting to a live audience, hosting a webinar, or hosting a highly confidential meeting, they prefer to use Zoom. **Fifty-six percent** of respondents prefer to use Zoom for live presenting compared to **21%** for Microsoft Teams, and **39%** prefer to use Zoom for a confidential meeting compared to **34%** for Microsoft Teams.

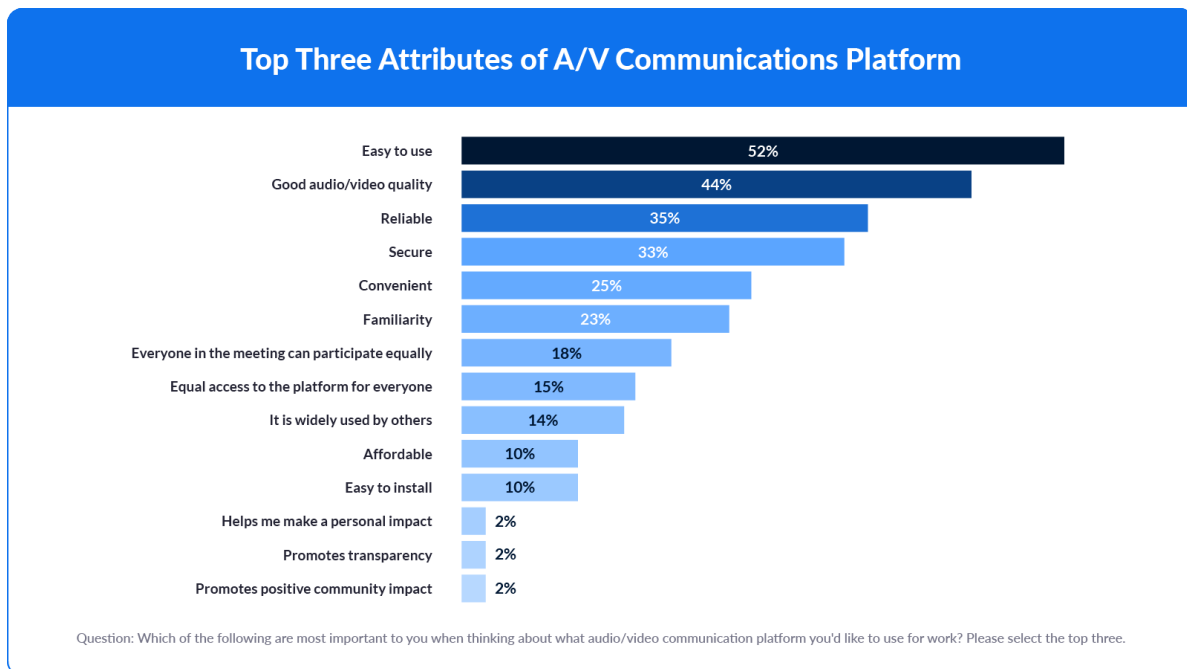


Why Zoom?

It's fair to ask why government workers prefer Zoom for various capabilities as compared to other platforms included in the survey. Respondents who preferred Zoom described the platform as “user-friendly” and “reliable” and known for its “familiarity” and “helpful features.”¹

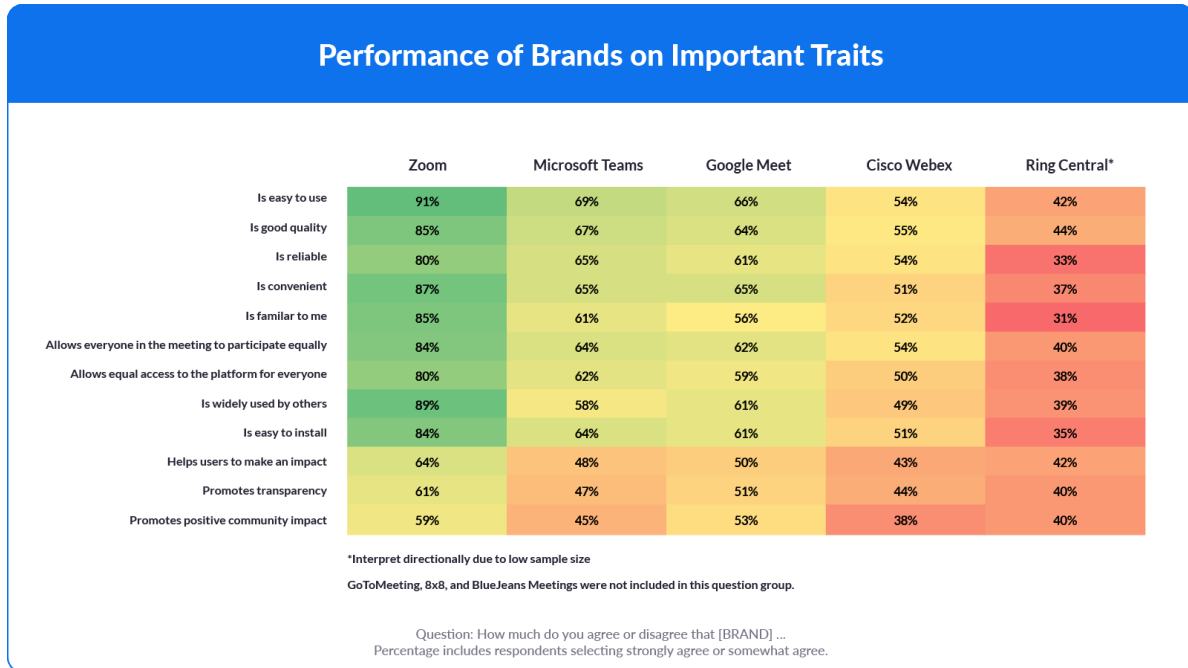
Knowing why surveyed government employees prefer one platform over another requires an understanding of what they look for in an audio and video communications platform. Those surveyed were asked which three attributes from a provided list were the most important to them. “Easy to use” emerged at the top, with **52%** of respondents selecting it as the characteristic most important to them, followed by:

- “Good audio/video quality” (**44%**)
- “Reliable” (**35%**)
- “Secure” (**33%**)



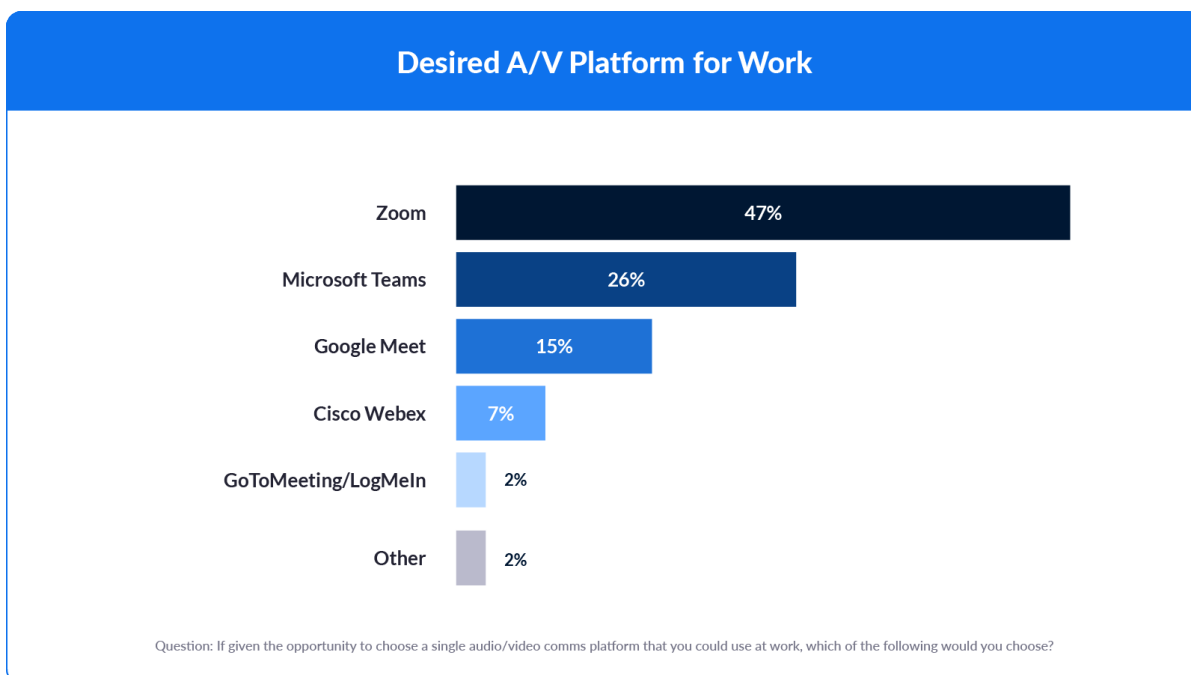
When compared with other platforms included in the survey, more respondents agreed that Zoom has these important traits across the board. The majority of respondents believe Zoom is easy to use (**91%**) and helps users to make an impact (**64%**).

The research also reveals how accessibility can potentially inform solution adoption. **Eighty-four percent** of respondents believe Zoom allows everyone in the meeting to participate equally and **80%** think it allows equal access to the platform for everyone. Comparatively, **64%** and **62%** of respondents think the same for Microsoft Teams, **62%** and **59%** for Google Meet, and **54%** and **50%** for Cisco Webex.



Respondents would select Zoom at work

We asked those surveyed which single audio and video communications platform they would choose to use at work if they could. For **47%** of the survey respondents, the answer was Zoom, as these respondents chose it over Microsoft Teams, Cisco Webex, and the other platforms included in the survey.



Government workers have an opinion, and it's important leaders factor employees' preferences into their decision-making when selecting audio and video solutions. As we enter an era defined by employee experience, strategic solutions are the key to unlocking a people-centric workplace. Whether agency workers are at home, in the office, or a mix of both, leaders should prioritize creating a workspace defined by technology tailored to employees' needs, not the other way around.

As agencies enter into a digital reality, partnering with providers like Zoom helps the government enable a better experience for employees. Zoom provides industry-leading video, chat, phone, and workspace solutions to help your agency embrace a new era defined by innovation and ingenuity.

Methodology

"Zoom's Impact in Government" survey, conducted between November 5 and November 13, 2021, of 300 United States federal, state, and local government employees who reported using an audio and video communication platform for work at least once a month. Where comparisons were sought, those surveyed had sufficient familiarity with Zoom and competitors to make the comparisons. The data was unweighted, and Morning Consult used quotas to approximate the composition of the audience. The margin of error for this study is +/- 6%.