



# Remote Work Readiness Index Asia Pacific & Japan (APJ)

*Survey conducted by Kantar on behalf of Dell Technologies, January 2021*

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**DELL**Technologies



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# Dell Technologies Remote Work Readiness Index

The events of 2020 have led organisations to change the way they work and rethink how work can be conducted. Overnight, employers and employees had to pivot to a remote work arrangement. As organisations come to terms with the new reality where a hybrid workplace will be the norm, factors conducive to productivity in the long run need to be considered. Dell Technologies surveyed over 7,000 working professionals\* aged 18 years and above from the Asia Pacific & Japan (APJ) region on their readiness for long-term remote work and views on the factors important for remote work success.



## Research Goal

The primary research goal was to capture hard data on the readiness of the workforce\* for long-term remote work, and understand the factors and concerns critical to support a remote workforce in the long term.



## Methodology

Kantar, a global research firm, conducted an online survey powered by the Kantar Profiles Network. The survey was fielded in 7 countries and 5 languages in October 2020. The survey included questions to understand factors important for remote work, including the technology and human resource (HR)-related support required to work remotely successfully, employers' efforts to provide these resources, and concerns around long-term remote work.



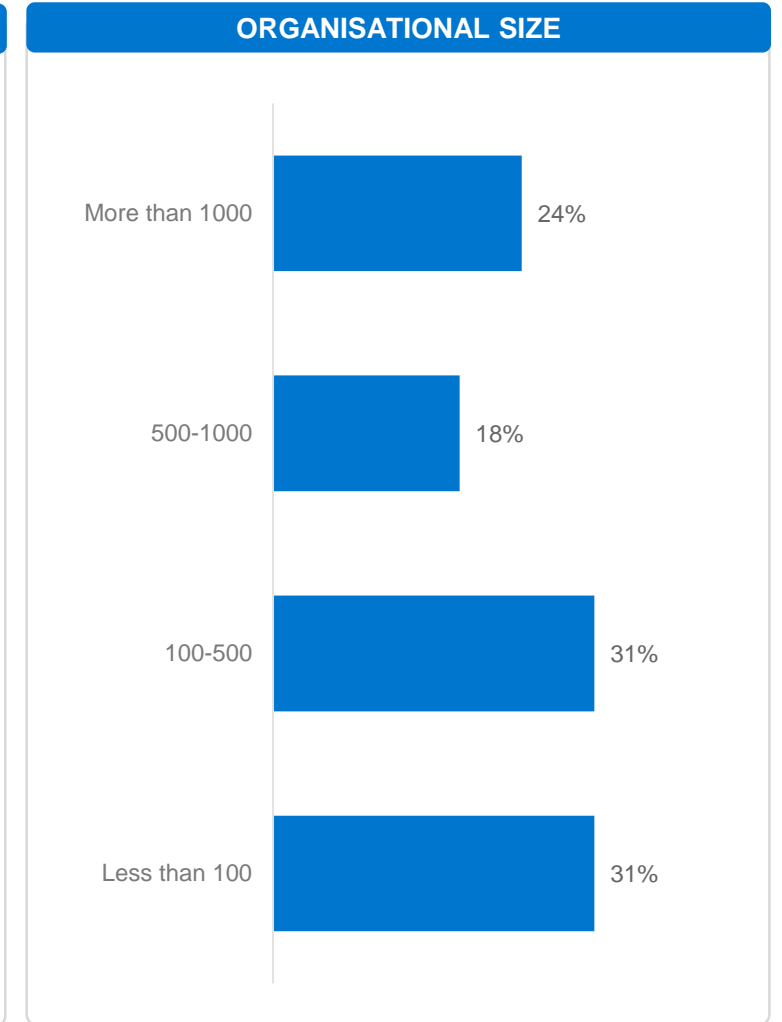
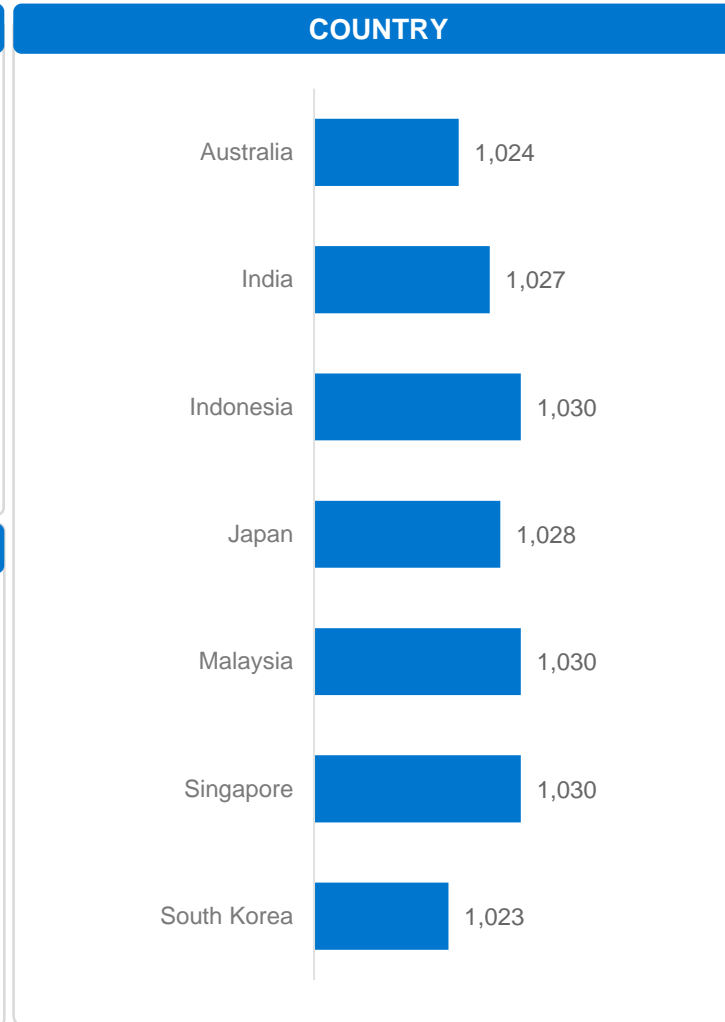
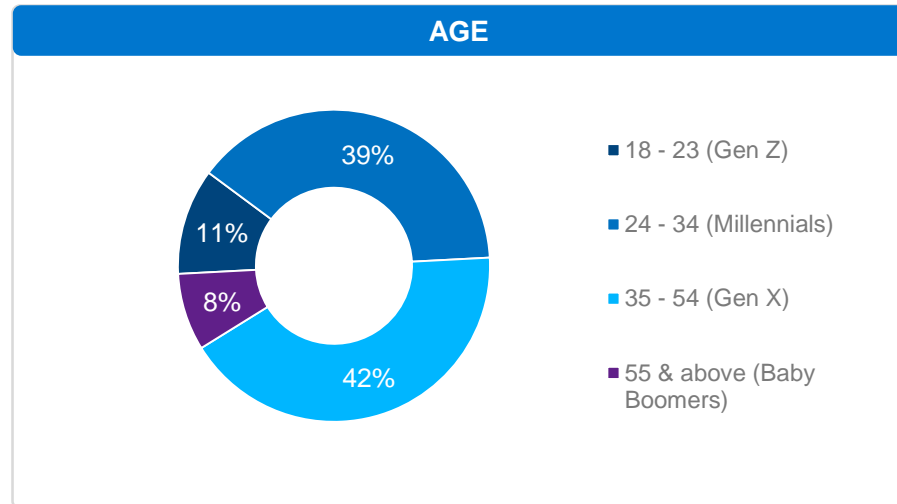
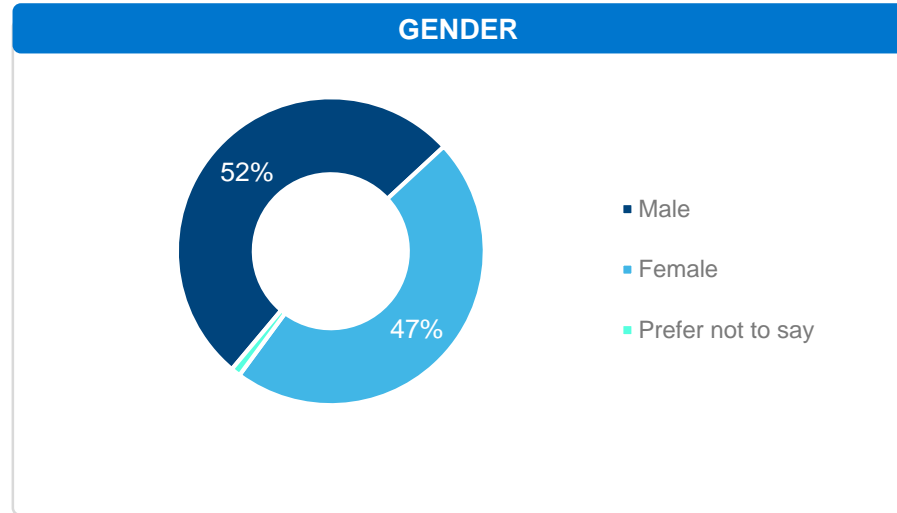
## Participants

7,192 individuals across the APJ region completed the survey. All were full-time working professionals aged 18 years and above who were and/or have been working from home to some degree throughout their respective national COVID-19 control measures. Demographic information captured included age, gender and organisational size.

\* Essential workers are excluded from this study as a pre-requisite of eligible respondents is that they must be able to conduct work remotely.

# Respondents' Profile

A total of 7,192 employees across seven markets in Asia Pacific & Japan (APJ) – Australia, India, Indonesia, Japan, Malaysia, Singapore and South Korea – participated in the research. Of those surveyed, we sought to understand their gender, age, and the size of the organisation they belong to.





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# Key Findings

## 1 EMPLOYEES IN APJ FEEL PREPARED TO WORK REMOTELY FOR THE LONG TERM.

*Eight in 10 feel prepared to work remotely for the long term. But only 46% feel that their company fully supports remote work.*

## 2 EMPLOYEES ARE WORRIED ABOUT THE BLURRING BOUNDARIES BETWEEN PROFESSIONAL & PERSONAL LIVES IN A LONG-TERM REMOTE WORK ARRANGEMENT.

*When thinking about remote work in the long term, employees are concerned about the blurring boundaries between professional & personal lives, job security due to a lack of interaction with their employer, and the stability of their remote network.*

## 3 MAJORITY OF EMPLOYEES FEEL THEIR EMPLOYER IS DOING AT LEAST SOME THINGS TO PROVIDE TECHNOLOGY AND HR-RELATED RESOURCES.

*In order to enable successful remote work, 50% felt that their employer is doing everything they can to provide the necessary tech resources; 40% feel that their employer is doing everything they can to provide the necessary HR resources.*

## 4 EMPLOYEES FIND THE USE OF PERSONAL PRODUCTIVITY TOOLS ONE OF THE TOP THREE TECH CHALLENGES WHILE REMOTE WORKING.

*Productivity equipment/ tools are ranked the top tech resource that employees want employers to provide. Other desired tech support include access to internal company resources and stable remote network.*

## 5 EMPLOYEES FIND THE LACK OF IN-PERSON COMMUNICATION A KEY CHALLENGE WHILE REMOTE WORKING.

*Other HR-related resources and support that employees want are learning and development sessions, best practice training for remote working and team engagement initiatives.*

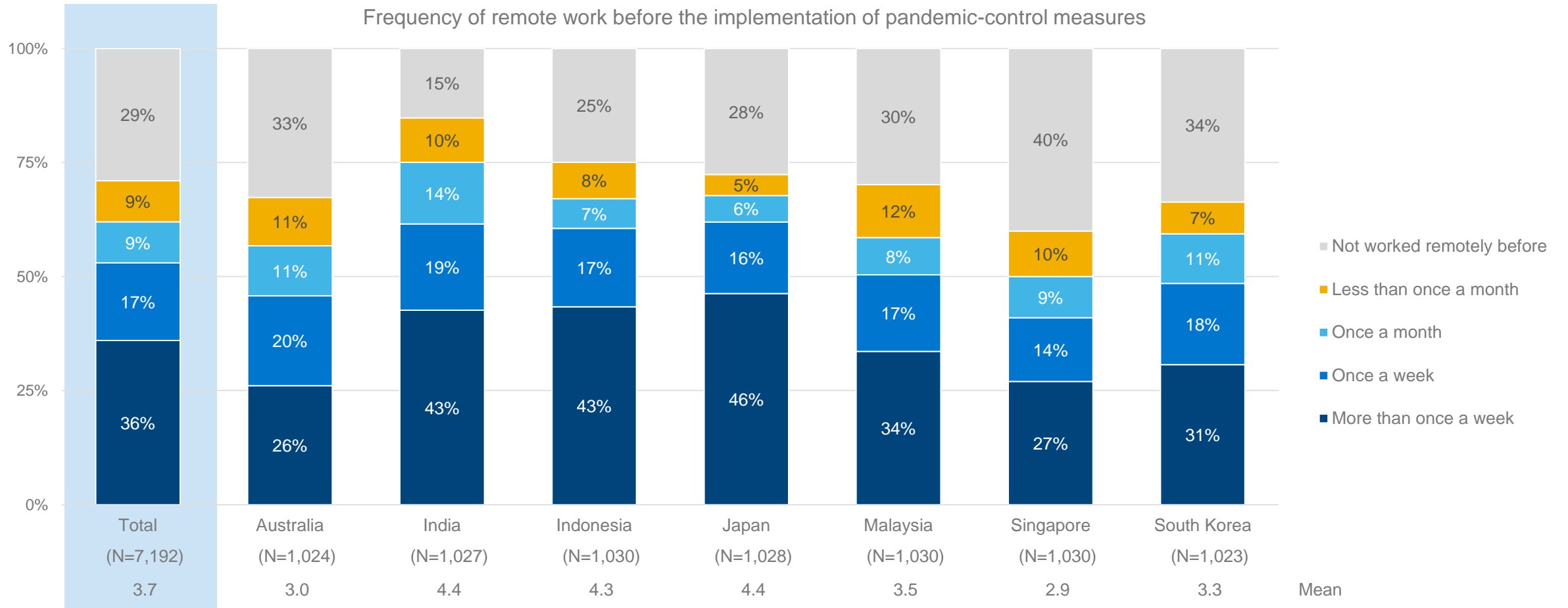


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# Seven in 10 employees in APJ had worked remotely before pandemic-control measures were implemented

- Remote working is not new to employees in APJ, with 71% having worked remotely to some degree before pandemic-control measures were implemented. On average, employees spent at least 3.7 days/ month working remotely.
- The top three countries with the most number of employees having worked remotely before are India (85%), Indonesia (75%) and Japan (72%).
- Employees in Singapore (40%) constitute the largest percentage of employees who had not worked remotely before.



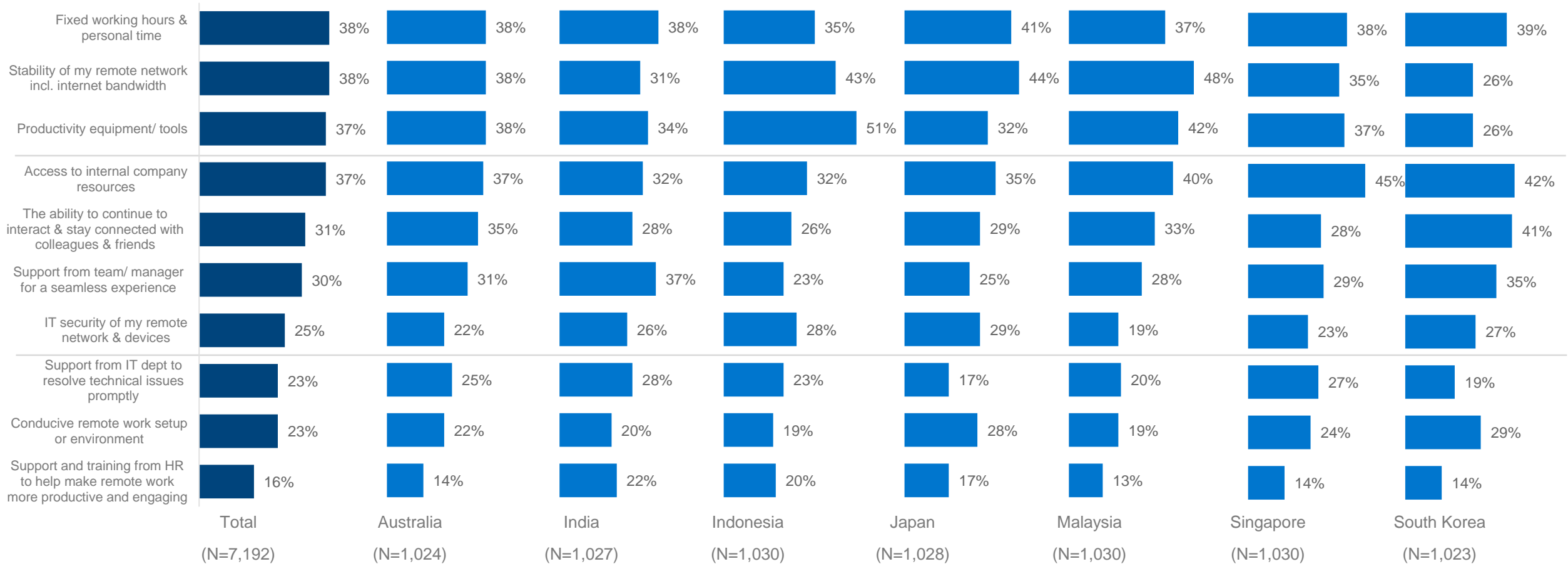
Q1. How frequently did you work remotely before pandemic-control measures were implemented?



# Fixed working hours & personal time, stability of employees' remote network, and productivity equipment/ tools are the most important factors for employees during remote working

- 38% of employees rate fixed working hours and personal time as the most important factor during remote working, with more employees in Japan (41%) feeling this way.
- Employees find support and training from HR to help make remote work more productive and engaging least important during remote working.
- The stability of employees' remote network, including Internet bandwidth, is more important for employees in Indonesia (43%), Japan (44%) and Malaysia (48%). In fact, it is ranked the most important factor for employees in Japan and Malaysia during remote working.
- More than half (51%) of surveyed employees in Indonesia value productivity equipment/ tools; the highest in APJ and also ranked the most important for employees in Indonesia.

Important factors during remote working



Q2. During remote working, please select in order of priority the top 3 factors that are important for you.

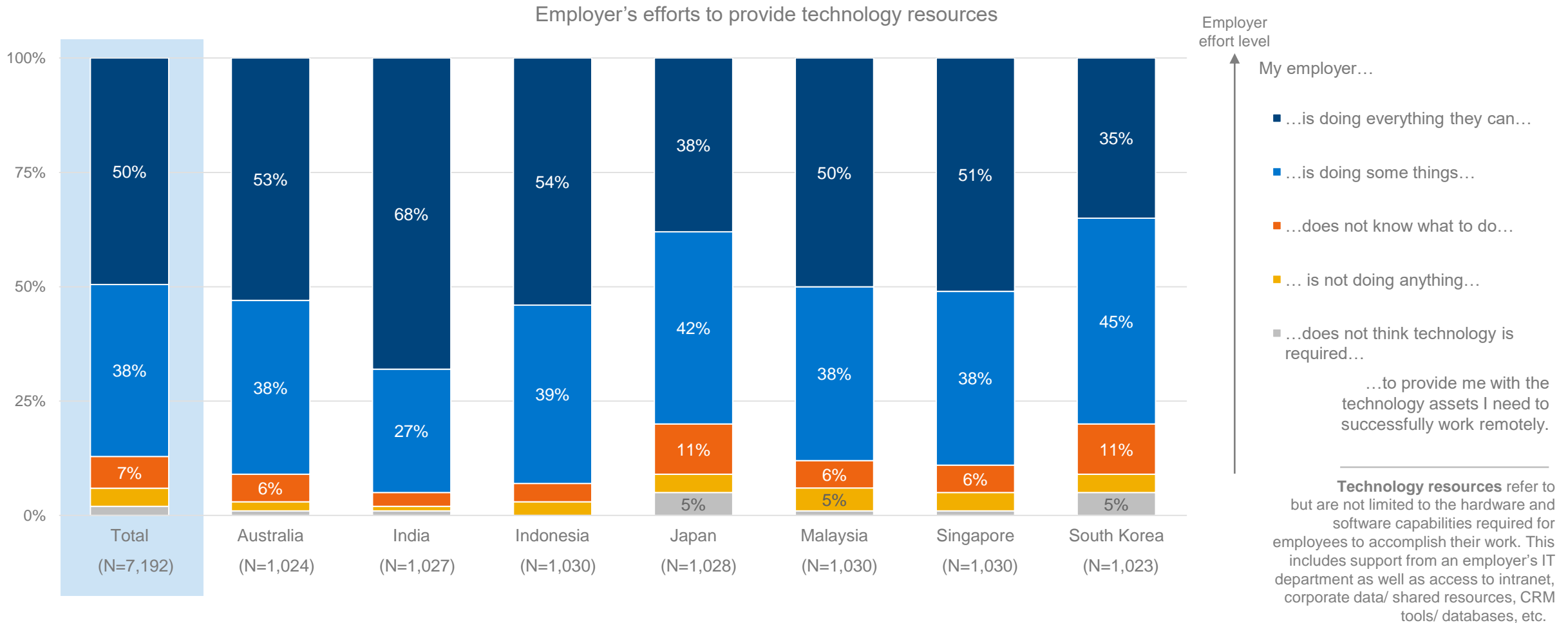


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# Half of surveyed employees feel that their employer is doing everything they can to provide the necessary technology resources to work remotely

- Employees in India (68%) constitute the largest percentage of those who feel that their employer is doing everything they can to provide the necessary technology resources to work remotely.
- Employees in Japan (38%) and South Korea (35%) make up the smallest percentage of those who feel that their employer is doing everything they can to provide the necessary technology resources to work remotely. These two countries also have the largest percentage (11%) of employees who feel that their employer does not know what to do to provide them with the necessary technology resources to work remotely.

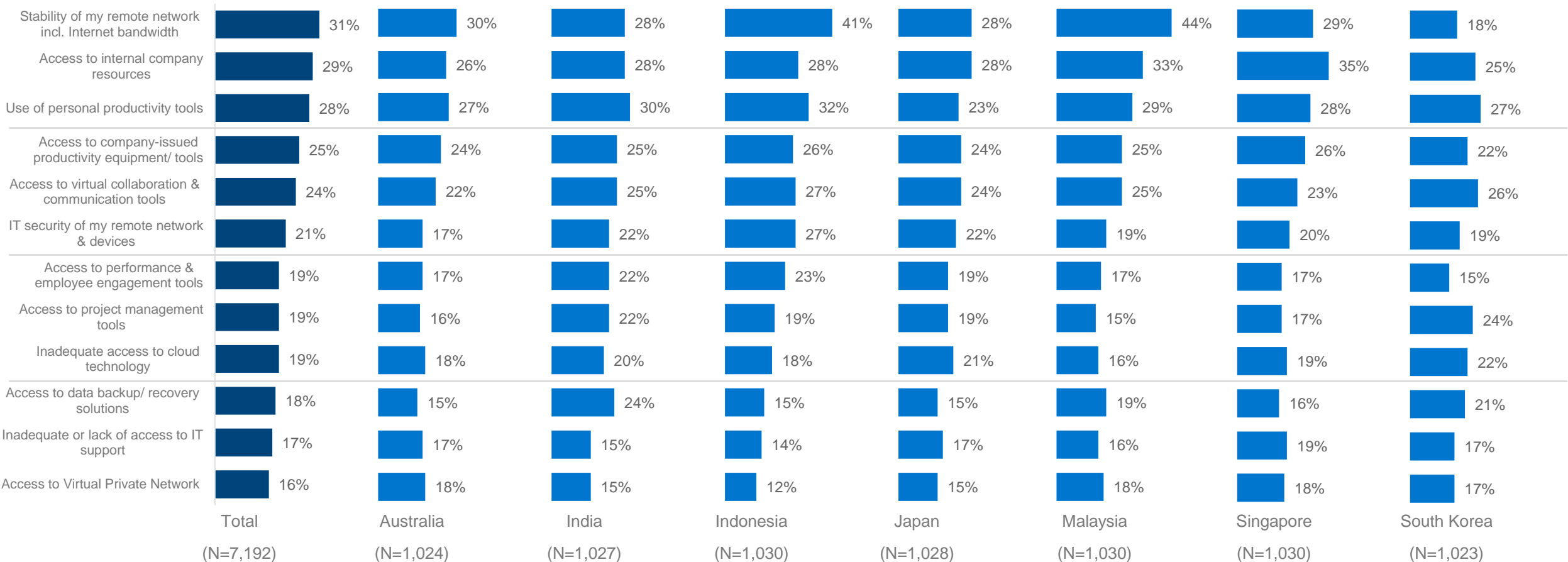


Q3. Thinking about technology resources to successfully work remotely, how would you describe your employer's efforts to provide them?

# Top three tech challenges are the stability of employees' remote network, access to internal company resources, and the use of personal productivity equipment/ tools

- The stability of employees' remote network including Internet bandwidth is the top tech challenge faced by employees while remote working during the implementation of pandemic-control measures. This was particularly challenging for employees in Malaysia (44%) and Indonesia (41%) who rated it as their top tech obstacle while remote working.
- Employees in Singapore (35%) account for the largest percentage of those who were hindered by access to internal company resources during remote working.
- 28% of employees in APJ reported needing to use personal productivity equipment/ tools for work. This can pose increased cybersecurity risks to corporate networks.

Top tech challenges while remote working during the implementation of pandemic-control measures

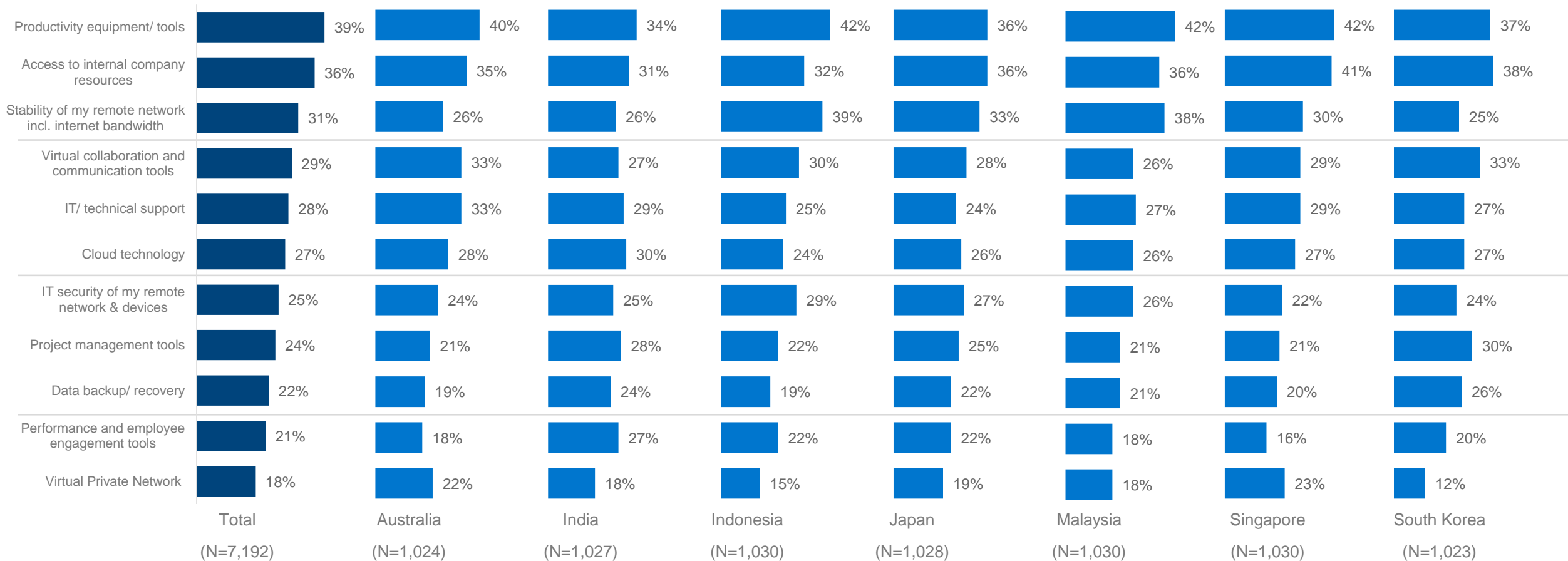


Q5. Thinking about remote work during the implementation of pandemic-control measures, please select the top 3 technology challenges that you faced.

# Productivity equipment/ tools is the top tech resource employees need for long-term remote work

- The top three tech resources that employees need for long-term remote work are 1) productivity equipment/ tools (39%); 2) access to internal company resources (36%); and 3) stable remote network, including Internet bandwidth (31%).
- Access to internal company resources is highly valued by employees in six out of seven markets. Employees in Singapore (41%) constitute the largest percentage of those who want their employers to provide this.
- Four out of seven markets consistently ranked a stable remote network as one of the top tech resource employees need. This is highest in Indonesia (39%) and Malaysia (38%).
- More employees in Australia (33%) and South Korea (33%) want employers to provide virtual collaboration and communication tools compared to other markets.

Top tech resources employers must provide



Q6. Thinking about remote work in the long term, please select in order of priority the top 3 technology resources that your employer must provide.

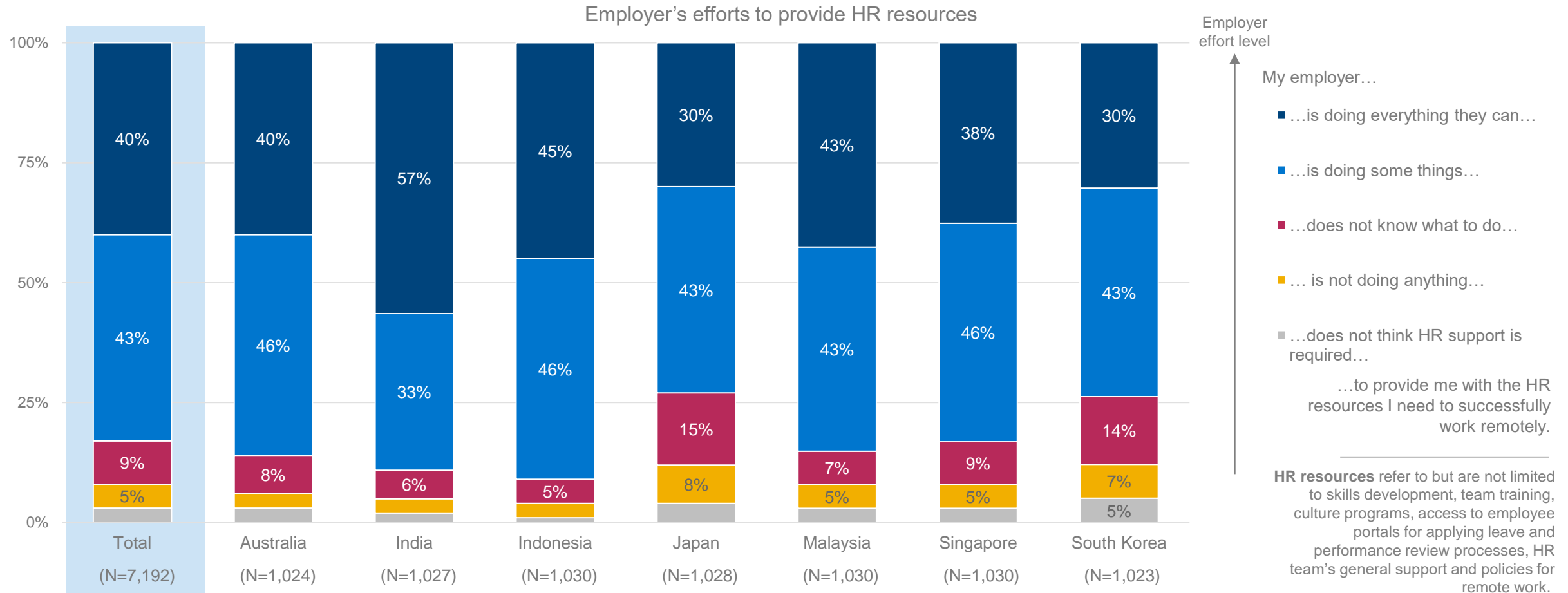


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# 83% of employees feel that their employer is doing at least some things to provide them with the necessary HR resources to work remotely successfully

- Only 40% of the employees feel that their employer is doing everything they can to provide them with the necessary HR resources to successfully work remotely.
- Employees in India (57%) constitute the largest percentage of those who feel that their employer is doing everything they can to provide the necessary HR resources to work remotely.
- Japan (30%) and South Korea (30%) have the smallest percentage of employees who feel that their employer is doing everything they can to provide the necessary HR resources for remote working. Employees in these markets also have the highest percentage (Japan: 15%; South Korea: 14%) of those who feel that their employer does not know what to do to provide them with the necessary HR resources to work remotely.

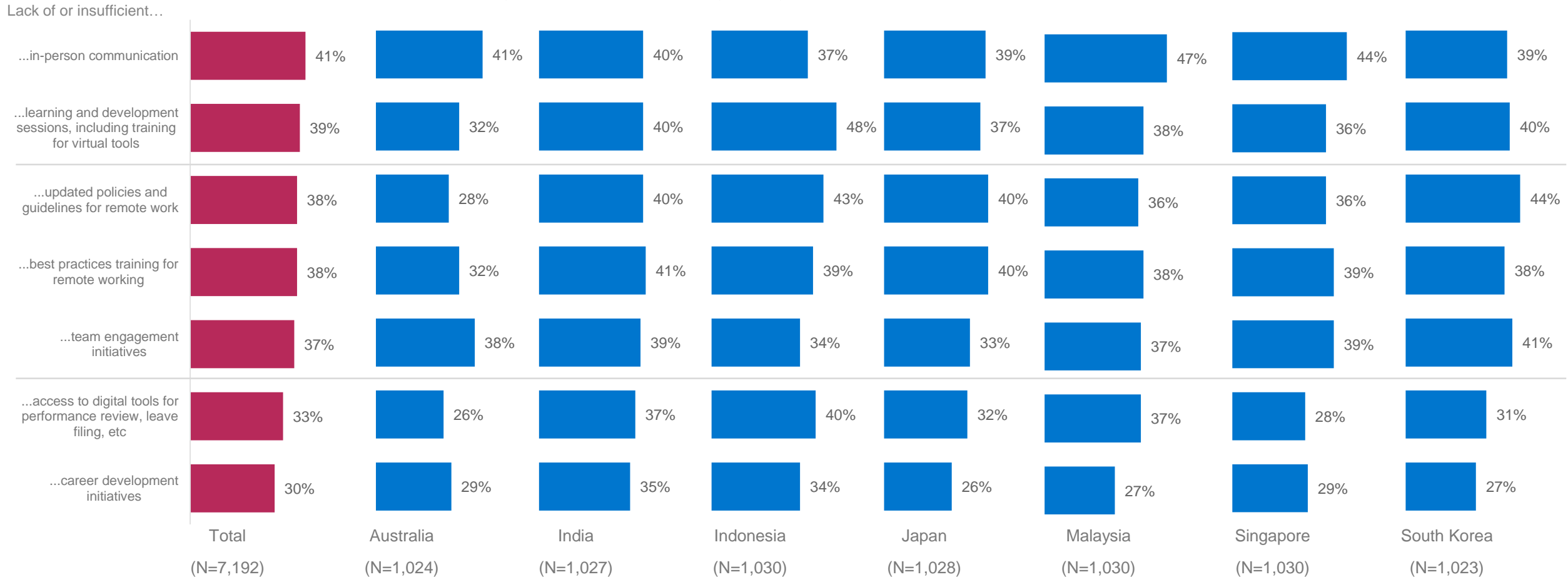


Q4. Thinking about HR resources to successfully work remotely, how would you describe your employer's efforts to provide them?

# Lack of in-person communication is a challenge for employees while remote working

- The three HR challenges faced by employees while remote working when pandemic-control measures were implemented are 1) lack of in-person communication (41%); 2) lack of or insufficient learning & development sessions, including training for virtual tools (39%); and 3) outdated policies and guidelines for remote work (38%) and lack of best practice training for remote working (38%).
- Employees in Malaysia (47%) constitute the largest percentage of those who agreed with the lack of in-person communication while remote working.
- Significantly more employees in Indonesia (48%) find the lack of or insufficient learning and development sessions, including virtual training, particularly challenging compared to employees from other markets.
- More employees in South Korea (44%) feel that they were held back by a lack of updated policies and guidelines for remote work, compared to employees from other countries.

Top HR challenges while remote working during the implementation of pandemic-control measures



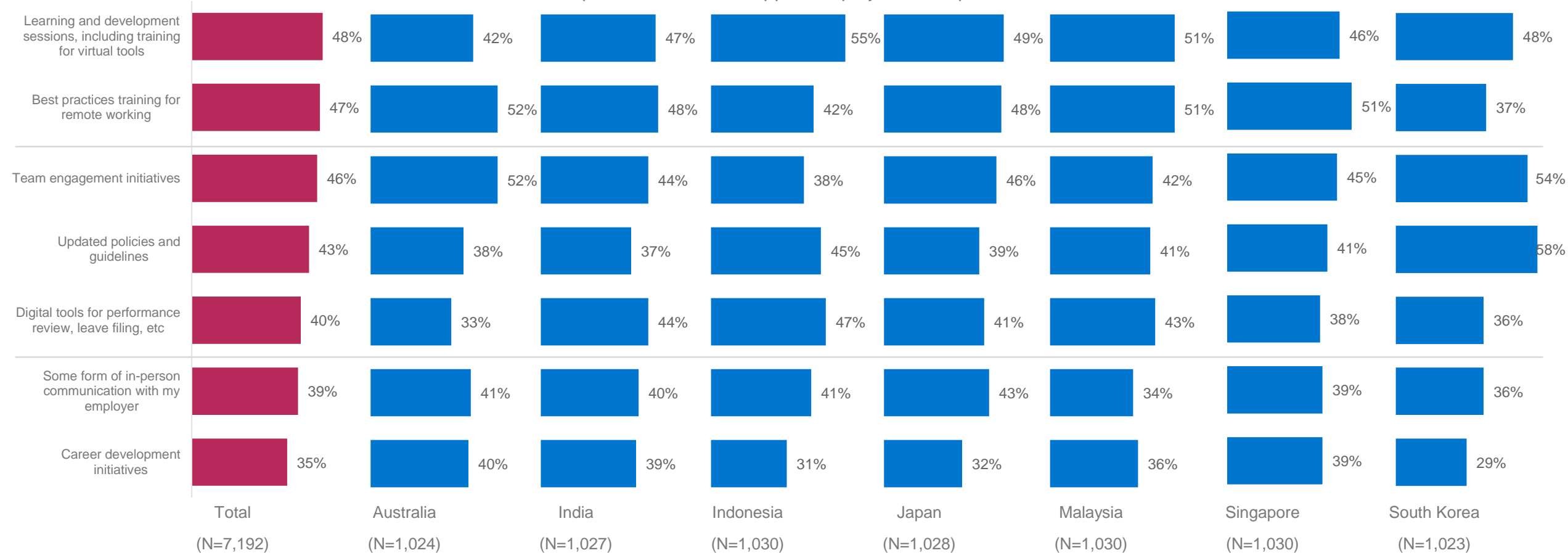
Q7. Thinking about remote work during the implementation of pandemic-control measures, please select the top 3 HR challenges that you faced.



# Employers must provide learning & development sessions for long-term remote work

- The top three HR resources and support that employees need for long-term remote work are 1) learning & development sessions, including training for virtual tools (48%); 2) best practice training for remote work (47%); and 3) team engagement initiatives (46%).
- Learning and development sessions are consistently ranked in the top three HR support that employers must provide. Employees in Indonesia particularly value this resource, with more than half (55%) of surveyed employees feeling this way.
- Best practice training for remote working including support for mental well-being are highly valued by five out of the seven markets. In particular, employees in Australia (52%) constitute the highest percentage of those who want best practice training for remote working, while fewer employees in South Korea (37%) feel this is important.
- Team engagement initiatives are more sought after by five out of the seven markets. In particular, more than half of employees in Australia (52%) and South Korea (54%) feel that their employer must provide this.
- An overwhelming 58% of employees in South Korea – the highest in APJ – feel that updated company policies and guidelines are necessary for the new realities of remote work.

Top HR resources & support employers must provide



Q8. Thinking about remote work in the long term, please select in order of priority the top 3 HR resources and support that your employer must provide.



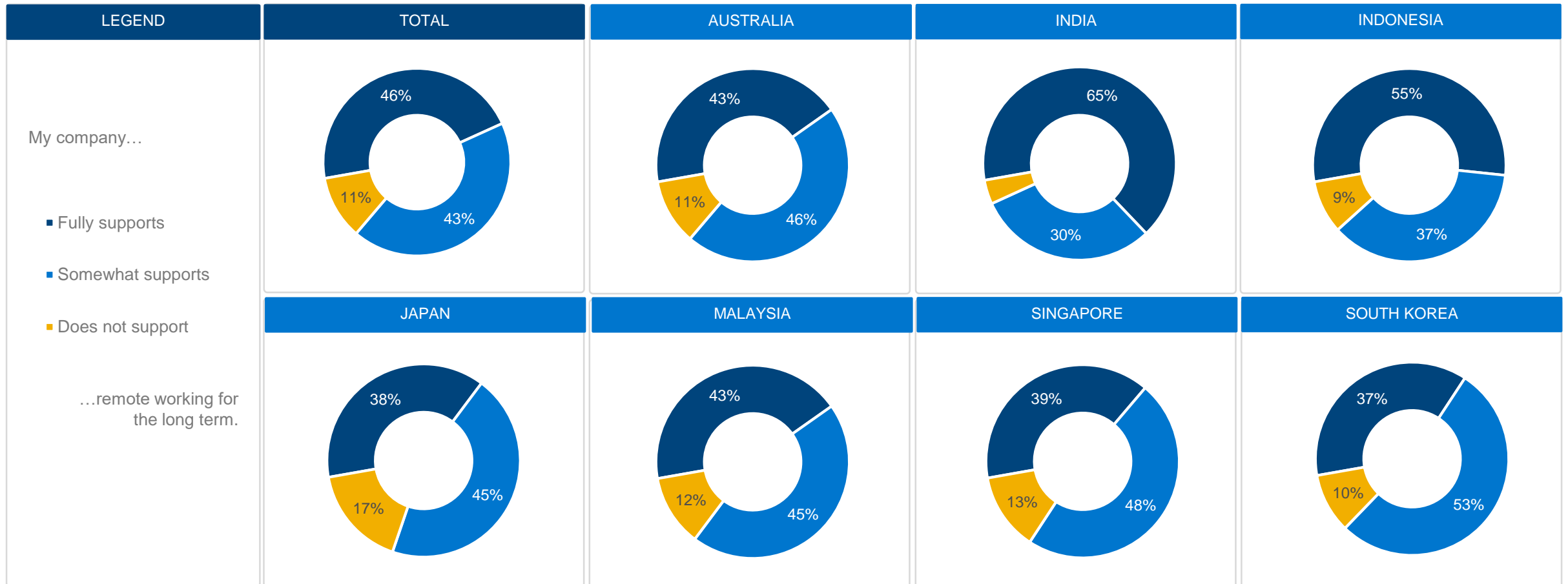
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# Only 46% feel that their company fully supports long-term remote work

- The top three countries where employees feel that their company fully supports long-term remote work are 1) India (65%); 2) Indonesia (55%); 3) Australia (43%) and Malaysia (43%).
- South Korea (37%) has the lowest percentage of employees who feel that their employer fully supports long-term remote work, while Japan (17%) has the highest percentage of employees who feel that their employer does not support long-term remote work at all.

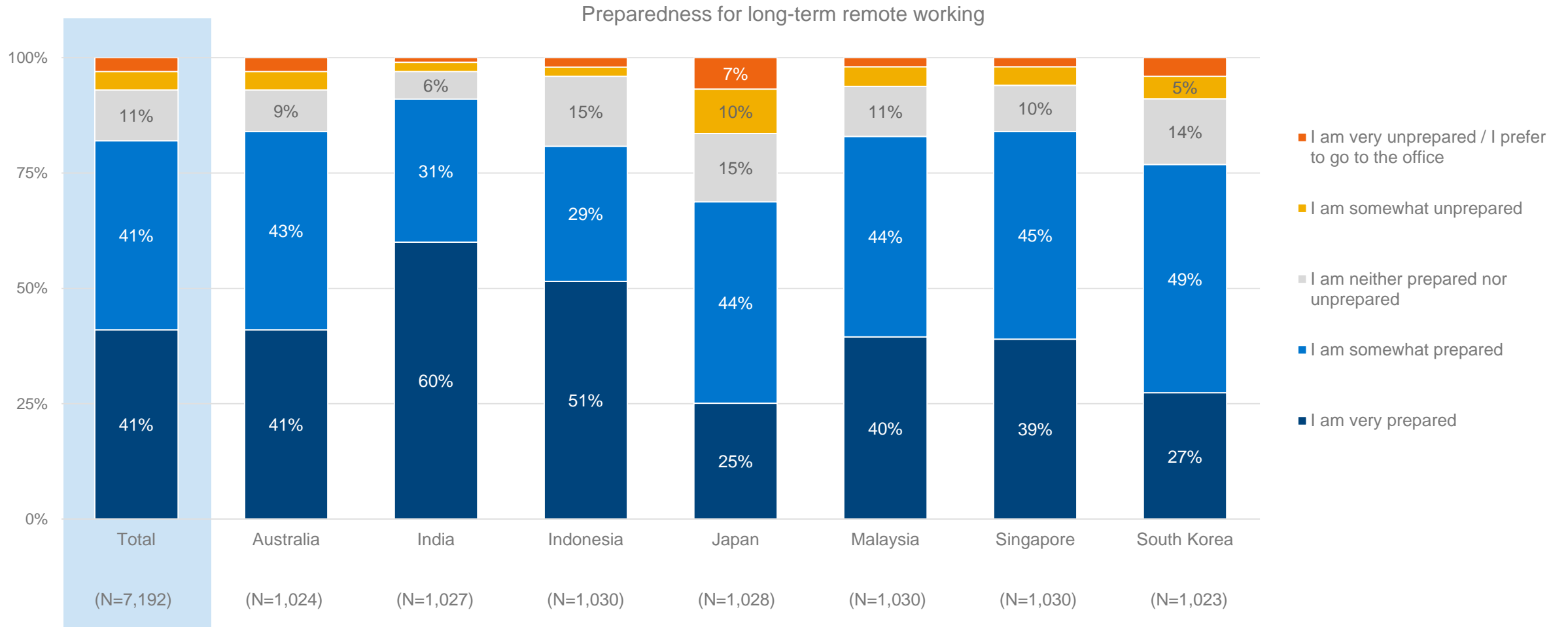
Company support for long-term remote working



Q9. To what extent do you think your company supports remote work for the long term?

# At least eight in 10 employees are somewhat prepared to work remotely for the long term

- Four in 10 employees are very prepared to work remotely for the long term after experiencing remote working when pandemic-control measures were implemented.
- Employees in India (60%) are most prepared to work remotely for the long term, followed by Indonesia with 51% of employees who feel very prepared to work remotely for the long term.
- Employees in Japan (17%) and South Korea (9%) constitute the highest percentage of those who are unprepared to work remotely or prefer to go to the office.

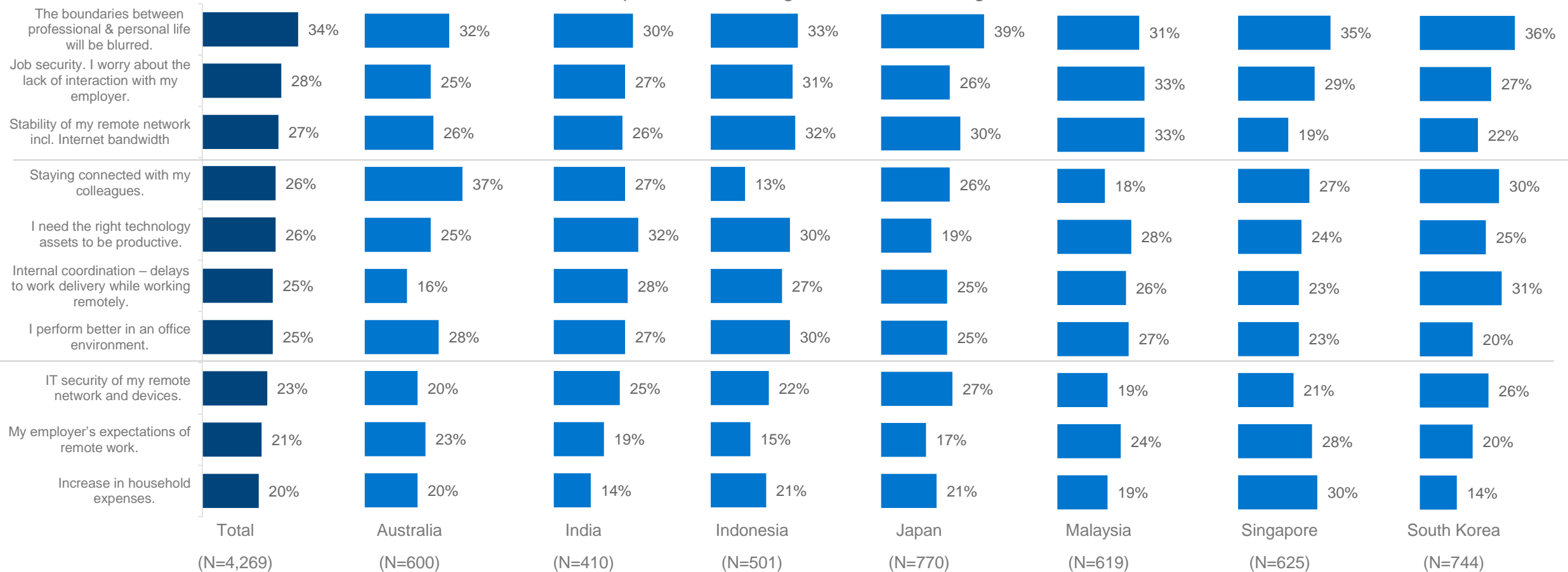


Q10A. Having experienced remote work during the implementation of pandemic-control measures, rate how prepared you are to work remotely for the long term?

# Employees are most concerned about the blurring boundaries between professional and personal lives when it comes to long-term remote work

- Key concerns for employees who are not fully prepared to work remotely for the long term are 1) blurring boundaries between professional & personal lives (34%); 2) job security from the lack of interaction with their employer (28%); as well as 3) stability of employees' remote network including Internet bandwidth (27%).
- Employees in four of the seven markets were most worried about the blurring boundaries between work and personal lives, with Japan being the highest at 39%.
- Australia polled the highest of those who were concerned about maintaining connection with their colleagues, with 37% of employees saying so; while employees in India (32%) were most concerned about having the right technology assets to be productive; and employees in Malaysia were most worried about job security and stability of their remote network.

Top concerns on long-term remote working



Q10B. Thinking about remote work in the long term, please select in order of priority your top 3 concerns.  
Base respondents: Not fully prepared to work remotely for long term

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