



Remote Work Readiness Index

Australia

Survey conducted by Kantar on behalf of Dell Technologies, December 2020

DELLTechnologies



CONTENTS

1. **OVERVIEW**
2. KEY FINDINGS
3. ATTITUDES TOWARD REMOTE WORKING
4. TECHNOLOGY RESOURCES
5. HR RESOURCES
6. READINESS FOR LONG-TERM REMOTE WORKING

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.



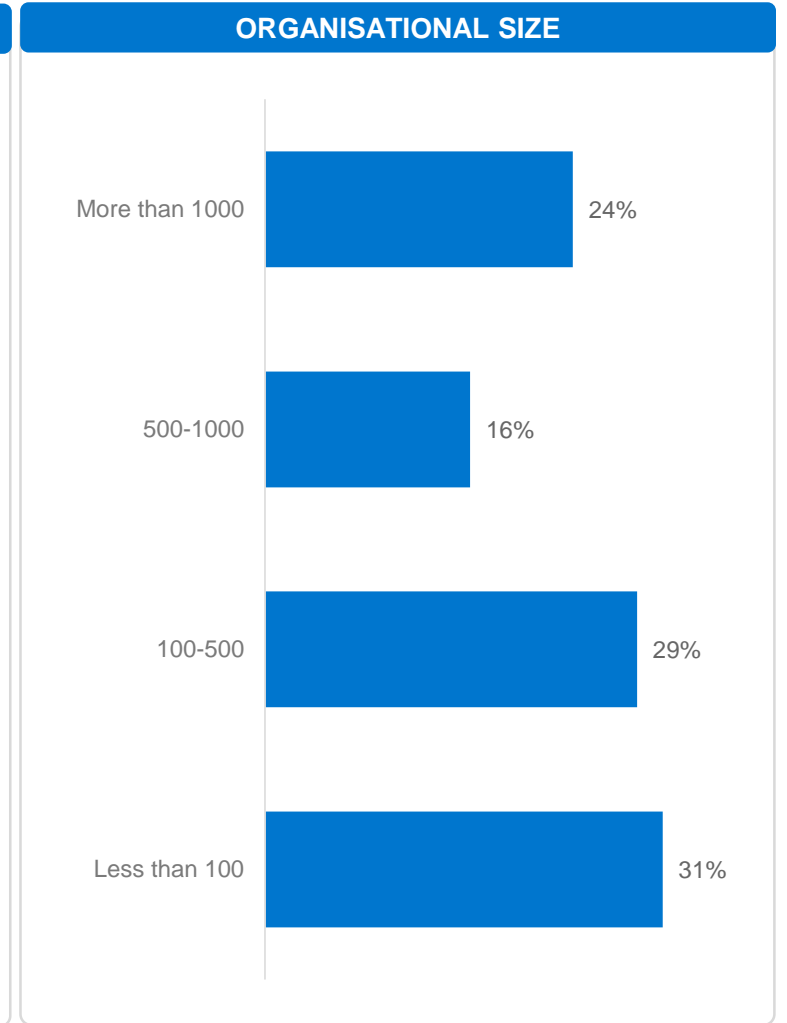
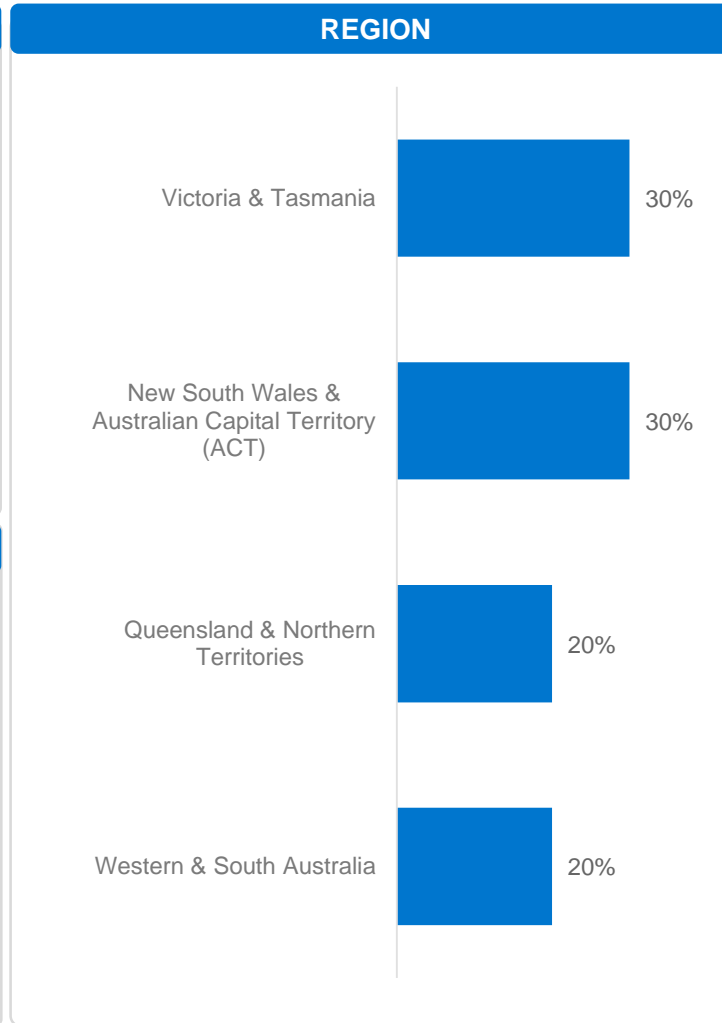
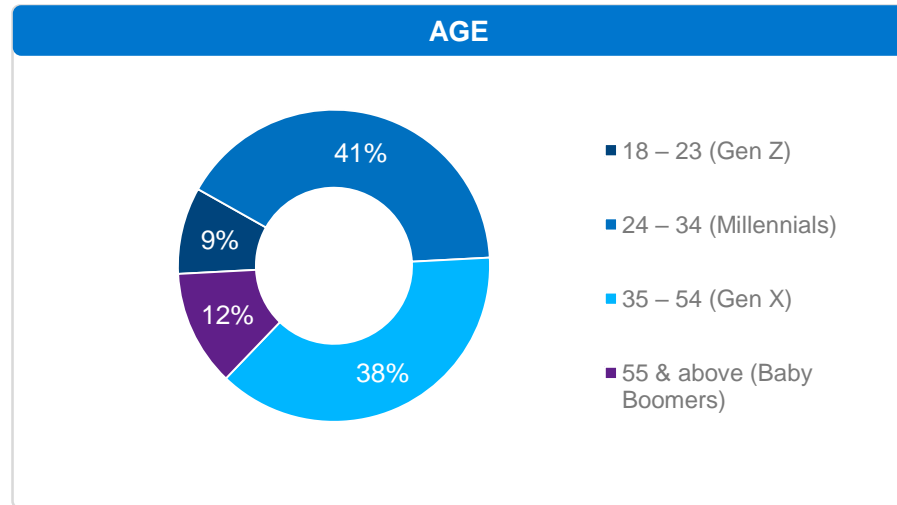
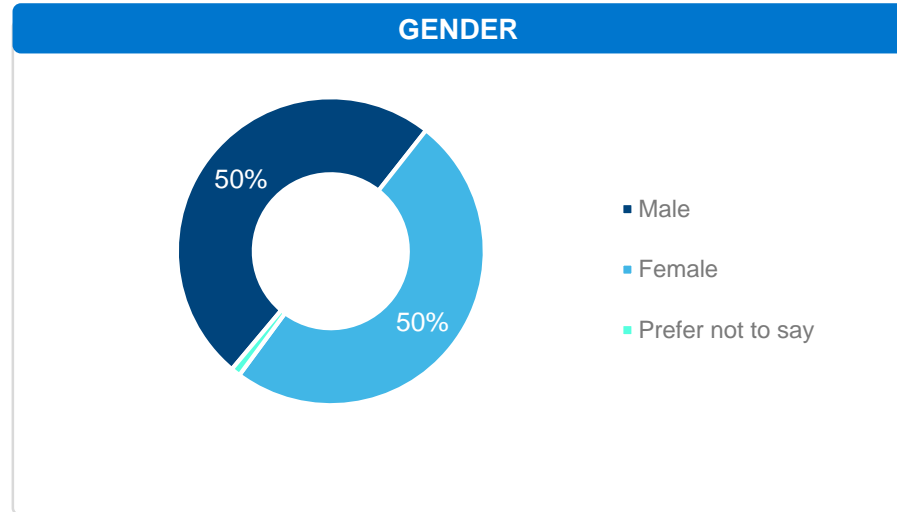
Participants

More than 7,000 individuals across the APJ region (of which 1,024 were from Australia) 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 1,024 employees in Australia participated in the research. Of those surveyed, we sought to understand their gender, age, the region where they reside, and the size of the organisation they belong to.





CONTENTS

1. ATTITUDES TOWARD REMOTE WORKING
2. OVERVIEW
- 3. KEY FINDINGS**
4. TECHNOLOGY RESOURCES
5. HR RESOURCES
6. READINESS FOR LONG-TERM REMOTE WORKING

Key Findings

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

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

2 EMPLOYEES ARE WORRIED ABOUT LOSING CONNECTION WITH THEIR COLLEAGUES IN A LONG-TERM REMOTE WORK ARRANGEMENT.

When thinking about remote work in the long term, employees are concerned about maintaining connection with their colleagues, blurring boundaries between professional & personal lives and the ability to perform as well in a remote environment.

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, 53% feel 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 HR resources.

4 EMPLOYEES FIND THE STABILITY OF THEIR REMOTE NETWORK THE GREATEST TECH CHALLENGE WHILE REMOTE WORKING.

IT/ technical support ranked among the top three tech resources that employees want employers to provide. Other desired tech support included productivity equipment/ tools and access to internal company resources.

5 EMPLOYEES FEEL THAT SOME FORM OF IN-PERSON COMMUNICATION IS IMPORTANT FOR LONG-TERM REMOTE WORK.

Other HR-related resources and support that employees want are team engagement initiatives and learning & development sessions.



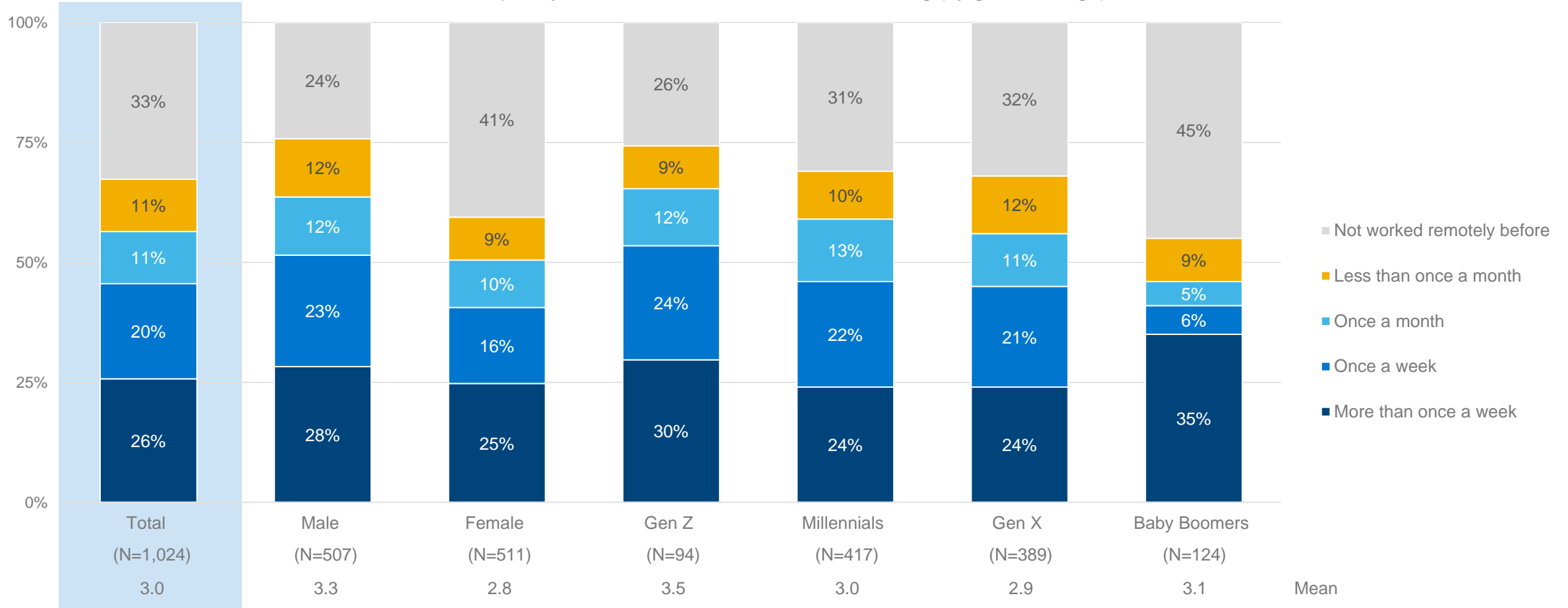
CONTENTS

1. OVERVIEW
2. KEY FINDINGS
- 3. ATTITUDES TOWARD REMOTE WORKING**
4. TECHNOLOGY RESOURCES
5. HR RESOURCES
6. READINESS FOR LONG-TERM REMOTE WORKING

At least a third of Australian employees had not worked remotely before social distancing

- Remote working is not new to Australian employees with 67% having worked remotely to some degree before social distancing. More male than female employees tended to do so.
- On average, Australian employees worked remotely at least three days a month before social distancing.
- Baby Boomers constitute the largest percentage of those who had not worked remotely before (45%).
- Seven in 10 Gen Z employees had worked remotely before - the highest across all age segments. The average Gen Z also spent more days in a month working remotely (at least 3.5 days/month).

Frequency of remote work before social distancing (by gender & age)



Q1. How frequently did you work remotely before Social Distancing in Australia?

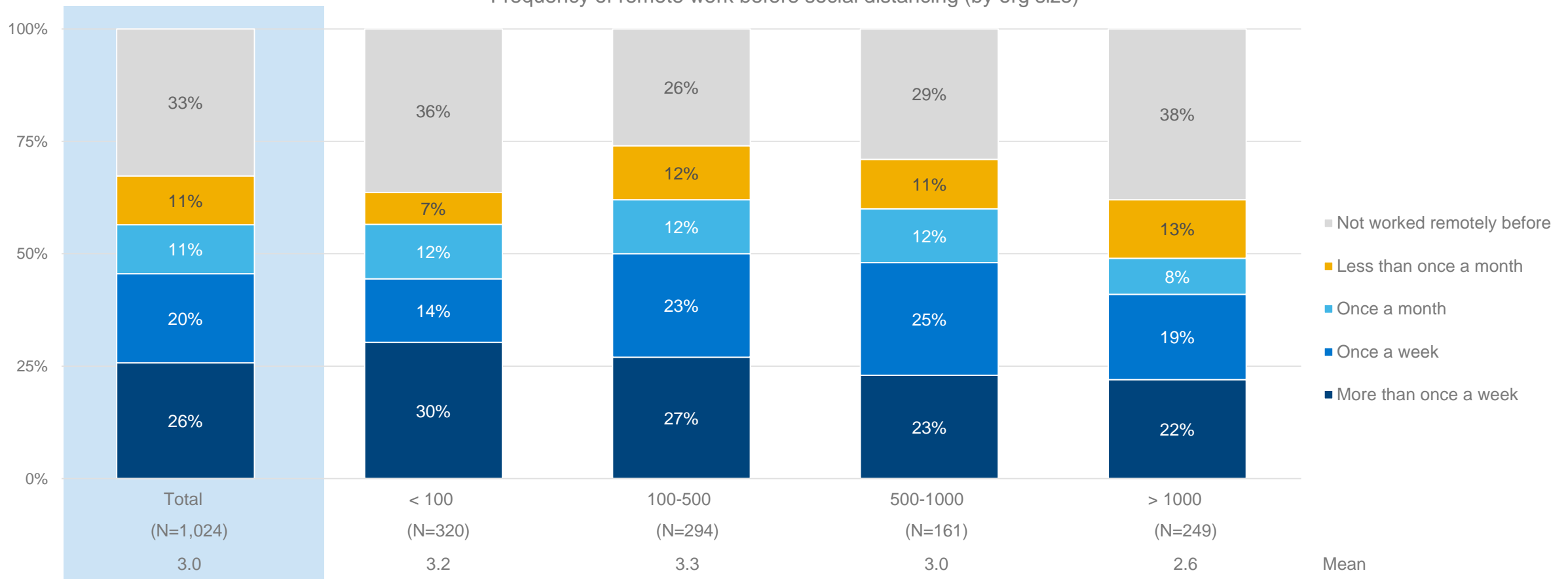
Gen Z: 18 to 23 years old | Millennials: 24 to 34 years old |
Gen X: 35 to 54 years old | Baby Boomers: 55 years old & above



Small to mid-sized organisations saw more employees working remotely before social distancing

- More employees in small to mid-sized organisations with 100 to 500 employees had worked remotely before social distancing.
- More employees in large organisations with more than 1,000 employees had not worked remotely before social distancing.

Frequency of remote work before social distancing (by org size)

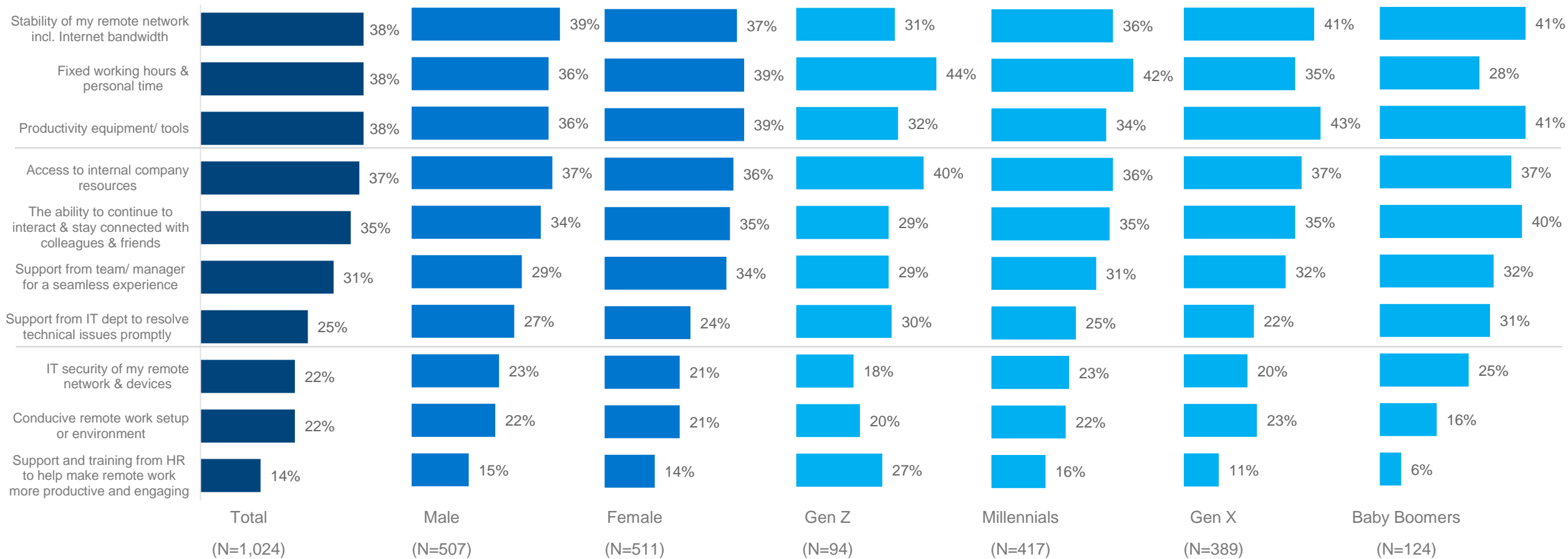


Q1. How frequently did you work remotely before Social Distancing in Australia?

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

- 38% of employees rate stability of their remote network, productivity equipment/ tools and fixed working hours and personal time as the most important factors during remote working.
- Employees find support and training from HR to make remote work more productive and engaging least important during remote working.
- Fixed working hours and personal time are more important for Gen Z and Millennials vs Gen X and Baby Boomers. Gen Z employees also value support and training from HR to help make remote work more productive and engaging than other age segments.

Important factors during remote working (by gender & age)



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

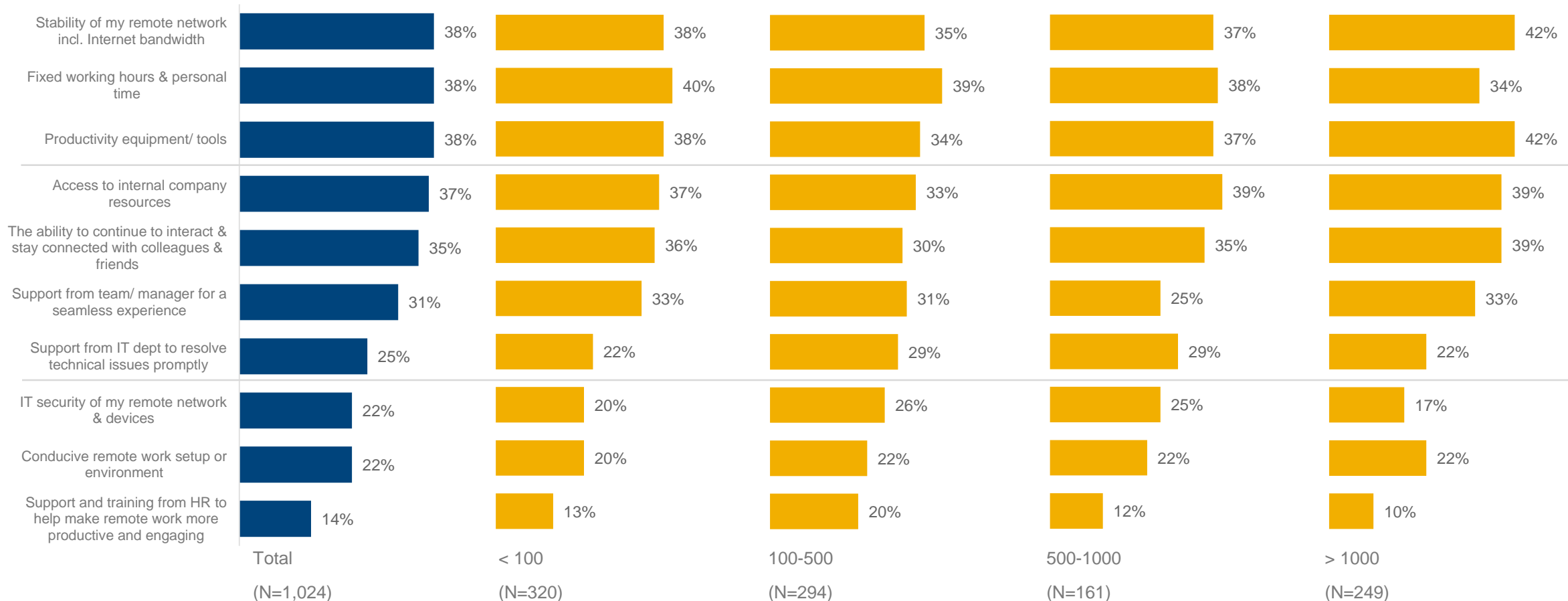
Gen Z: 18 to 23 years old | Millennials: 24 to 34 years old |
Gen X: 35 to 54 years old | Baby Boomers: 55 years old & above



Amongst the top important factors, more employees in large organisations value the stability of their remote network and productivity equipment/ tools

- Employees across different organisational size agree on the same top important factors during remote working.
- However, more employees in small to mid-sized organisations with less than 500 employees value fixed working hours and personal time compared to employees in large organisations with more than 1,000 employees. Those in the large organisations place greater value on the stability of their remote network and productivity equipment/ tools.

Important factors during remote working (by org size)



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

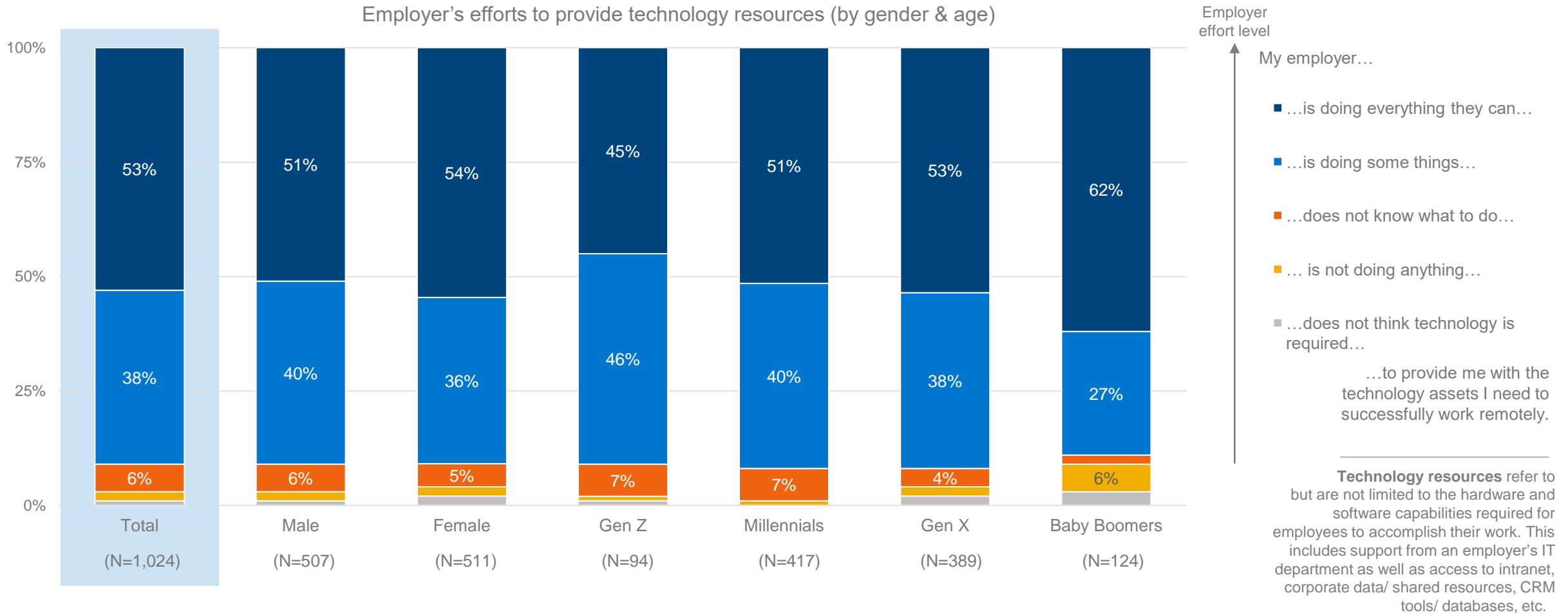


CONTENTS

1. OVERVIEW
2. KEY FINDINGS
3. ATTITUDES TOWARD REMOTE WORKING
- 4. TECHNOLOGY RESOURCES**
5. HR RESOURCES
6. READINESS FOR LONG-TERM REMOTE WORKING

53% of employees feel that their employer is doing everything they can to provide them with the necessary technology resources to work remotely

- The majority of employees (91%) feel that their employer is doing at least some things to provide them with the technology resources to successfully work remotely, with more than half (53%) feeling that their employer is doing everything they can.
- Among the various age segments, significantly more Baby Boomers feel that their employer is doing everything they can to provide them with the technology resources required to work remotely successfully.

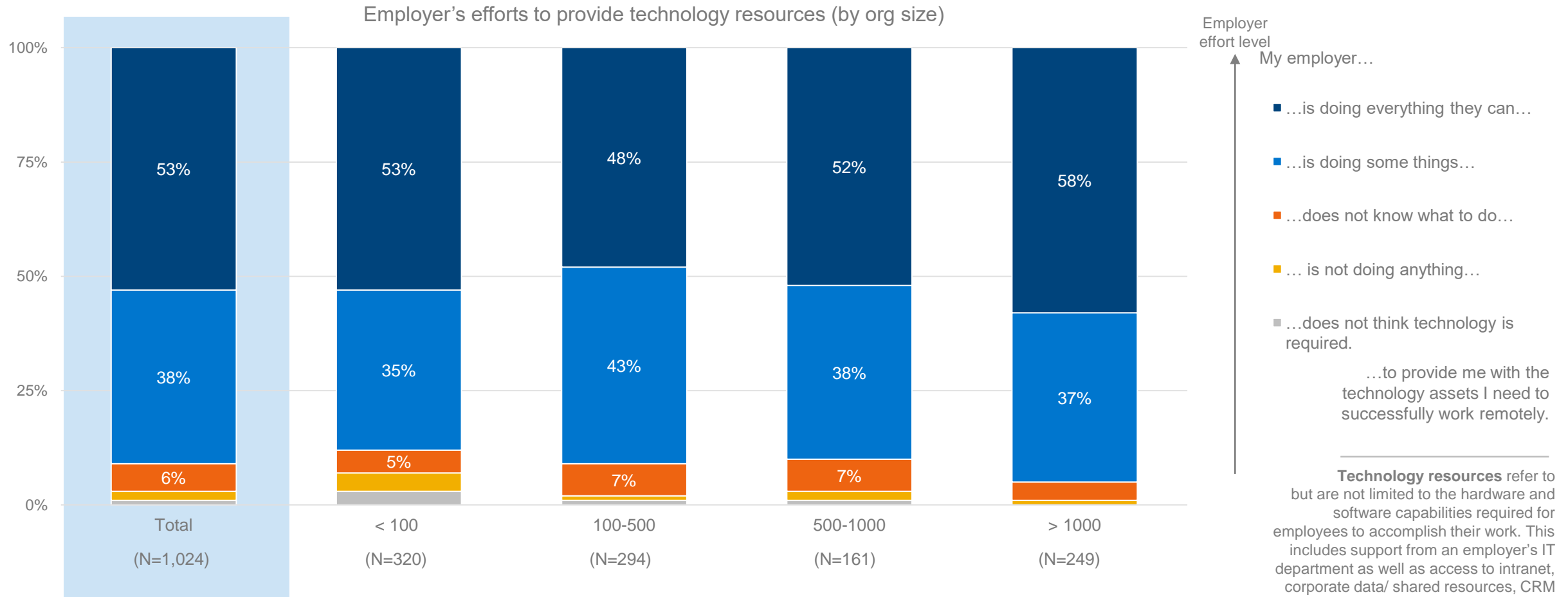


Q3. Thinking about technology resources to successfully work remotely, how would you describe your employer's efforts to provide them?

Gen Z: 18 to 23 years old | Millennials: 24 to 34 years old |
Gen X: 35 to 54 years old | Baby Boomers: 55 years old & above

Organisations of all sizes see the importance of providing employees with the technology resources required for remote work

- At least nine in 10 employees across all organisational size feel that their employer is doing at least some things to provide them with the technology resources to work remotely successfully, with large organisations of more than 1,000 employees scoring the highest (95%).

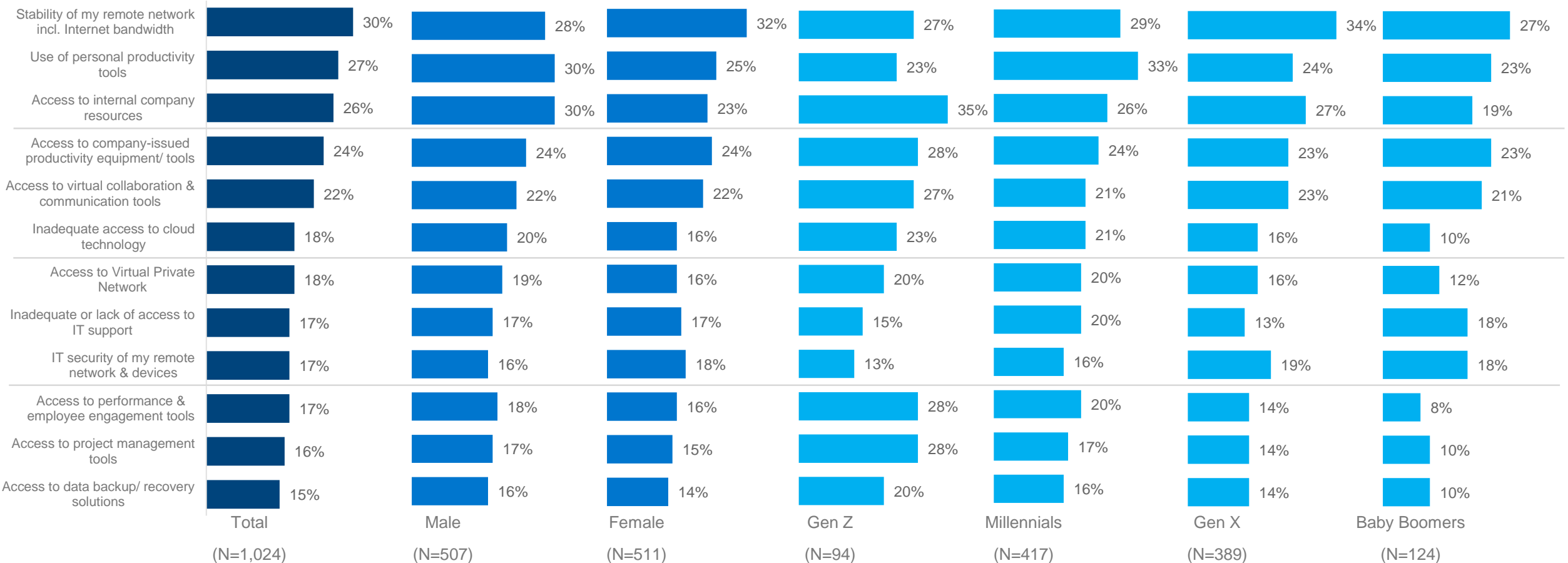


Q3. Thinking about technology resources to successfully work remotely, how would you describe your employer's efforts to provide them?

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

- Stability of employees' remote network is the top tech challenge faced by employees while remote working during social distancing.
- Access to data backup/ recovery solutions is the least of the challenges faced by employees while remote working during social distancing.

Top tech challenges while remote working during social distancing (by gender & age)



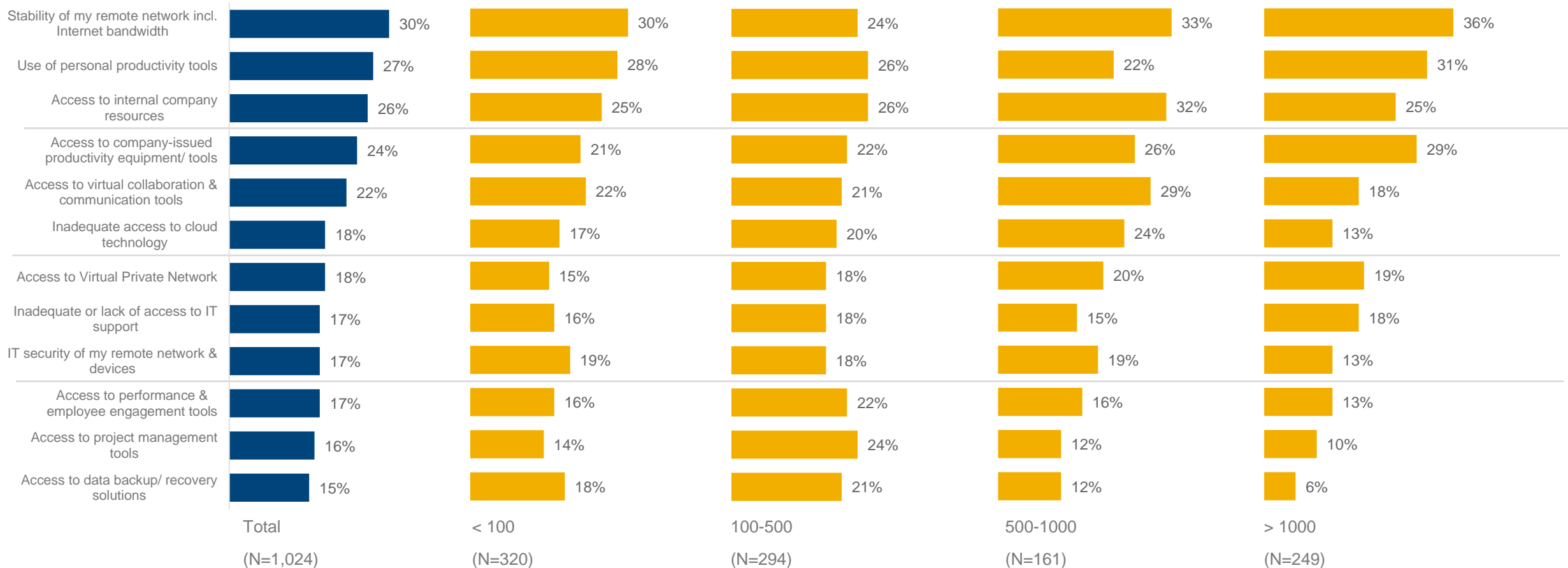
Q5. Thinking about remote work during social distancing, please select the top 3 technology challenges that you faced.

Gen Z: 18 to 23 years old | Millennials: 24 to 34 years old | Gen X: 35 to 54 years old | Baby Boomers: 55 years old & above



Stability of employees' remote network consistently ranked in the top three tech challenges faced by employees across organisations of all sizes

Top tech challenges while remote working during social distancing (by org size)

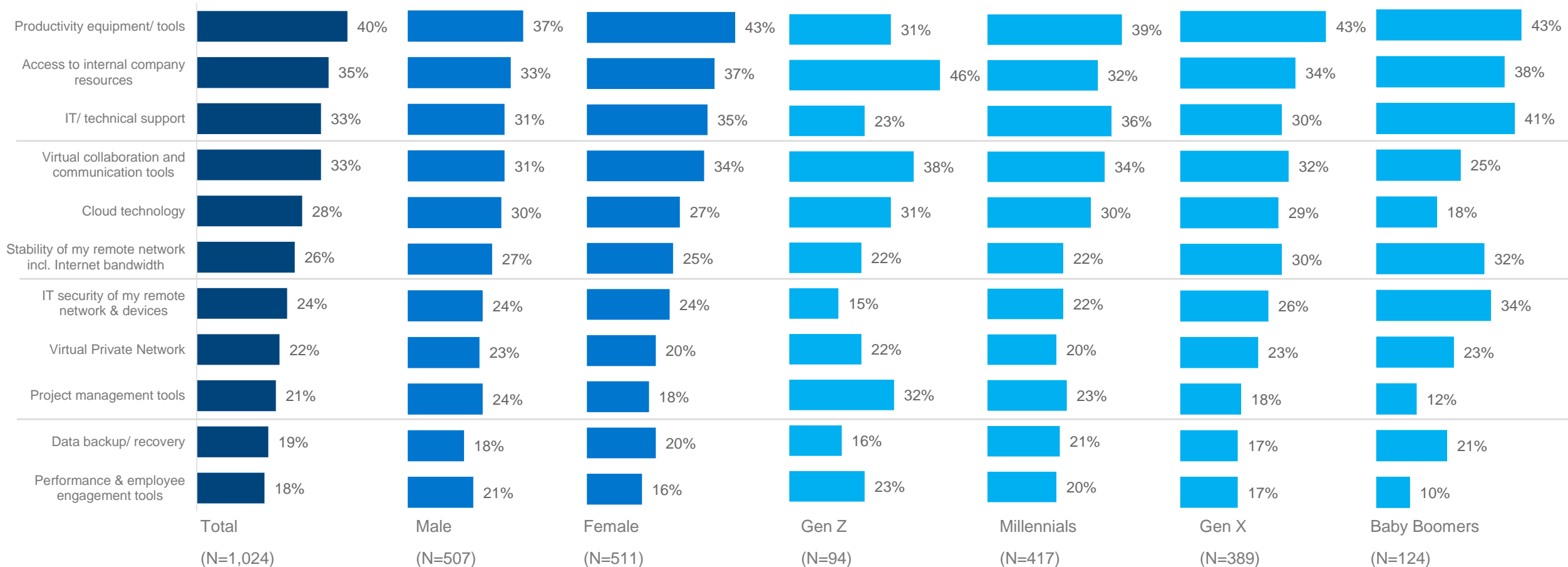


Q5. Thinking about remote work during social distancing, please select the top 3 technology challenges that you faced.

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

- The top three tech resources that employees want employers to provide for long-term remote work are 1) productivity equipment/ tools (40%); 2) access to internal company resources (35%); and 3) IT/ technical support (33%), as well as virtual collaboration and communication tools.

Top tech resources employers must provide (by gender & age)



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.

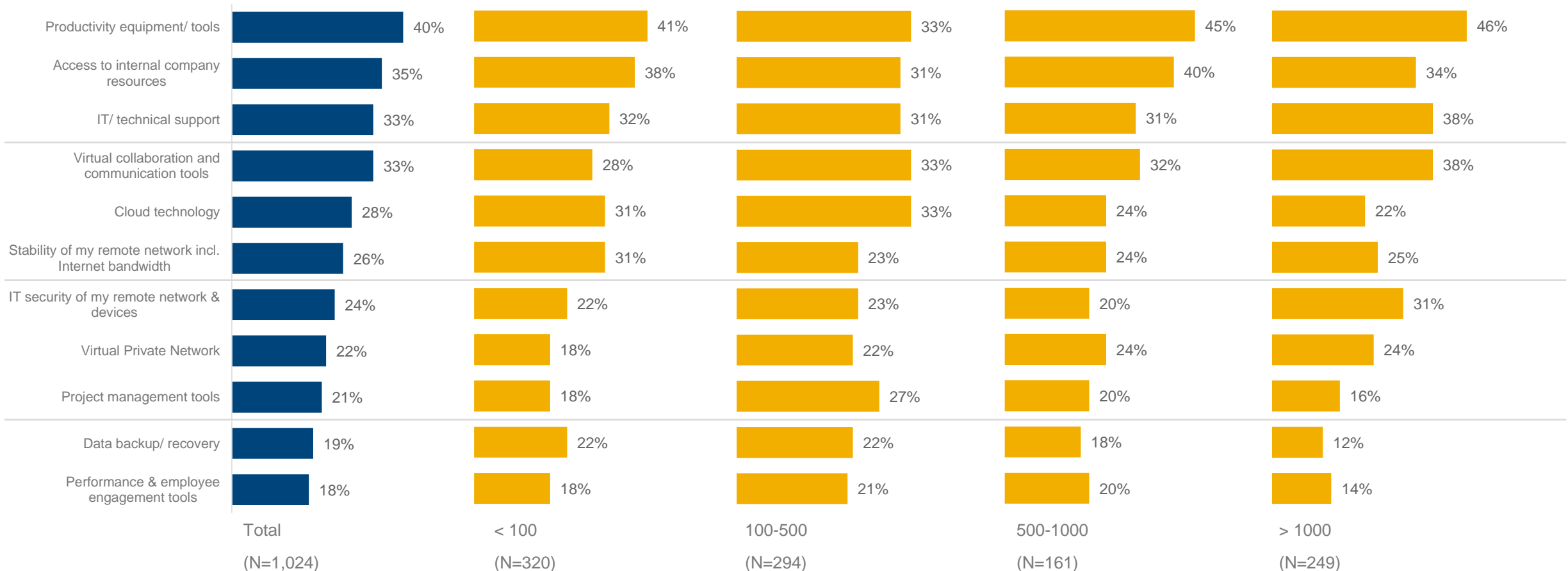
Gen Z: 18 to 23 years old | Millennials: 24 to 34 years old | Gen X: 35 to 54 years old | Baby Boomers: 55 years old & above



Across organisations of all sizes, employees consistently ranked productivity equipment/ tools as most important for long-term remote work

- Significantly more employees in large organisations (>1,000 employees) ranked IT security of their remote network and devices as important compared to employees in other organisational sizes.

Top tech resources employers must provide (by org size)



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.

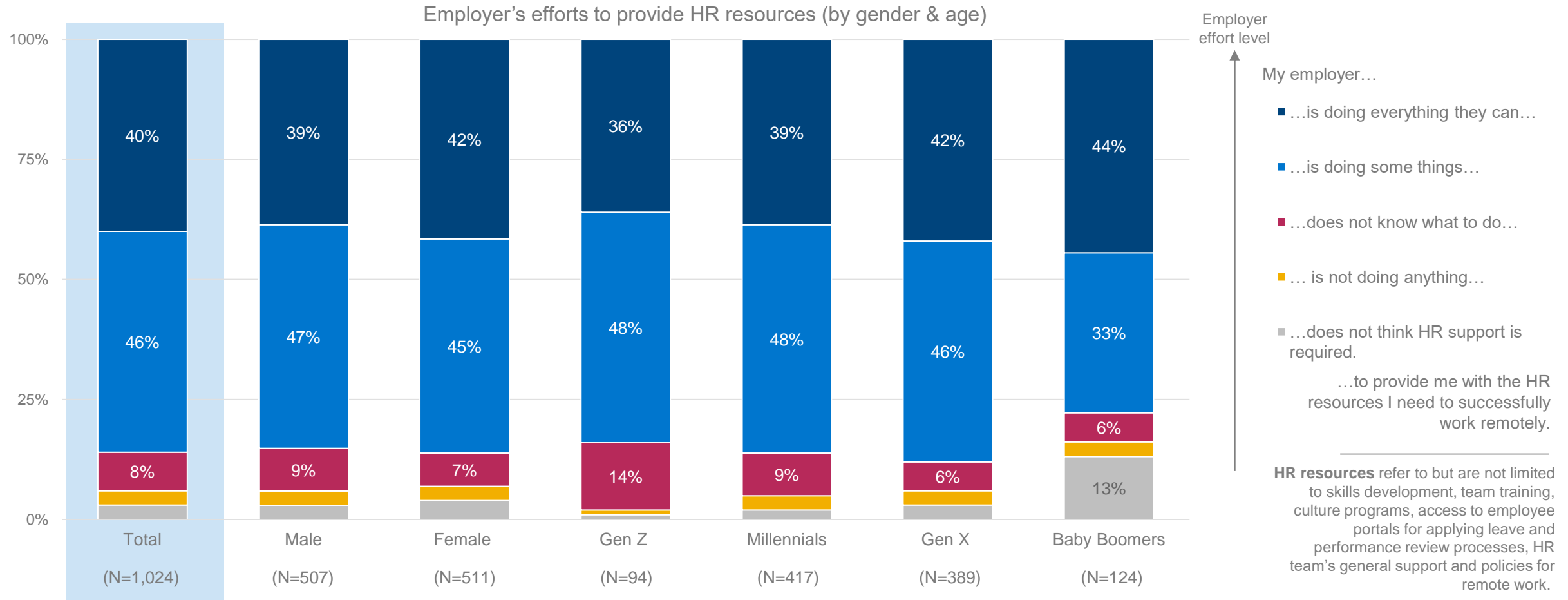


CONTENTS

1. OVERVIEW
2. KEY FINDINGS
3. ATTITUDES TOWARD REMOTE WORKING
4. TECHNOLOGY RESOURCES
- 5. HR RESOURCES**
6. READINESS FOR LONG-TERM REMOTE WORKING

86% 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 employees feel that their employer is doing everything they can to provide them with the necessary HR resources to work remotely successfully.
- Gen Zs make up the largest percentage (14%) of those who feel that their employer does not know what to do to provide the HR resources needed to work remotely successfully.
- Baby Boomers make up the largest percentage (13%) of those who feel that their employer does not think HR support is required for them to work remotely successfully.

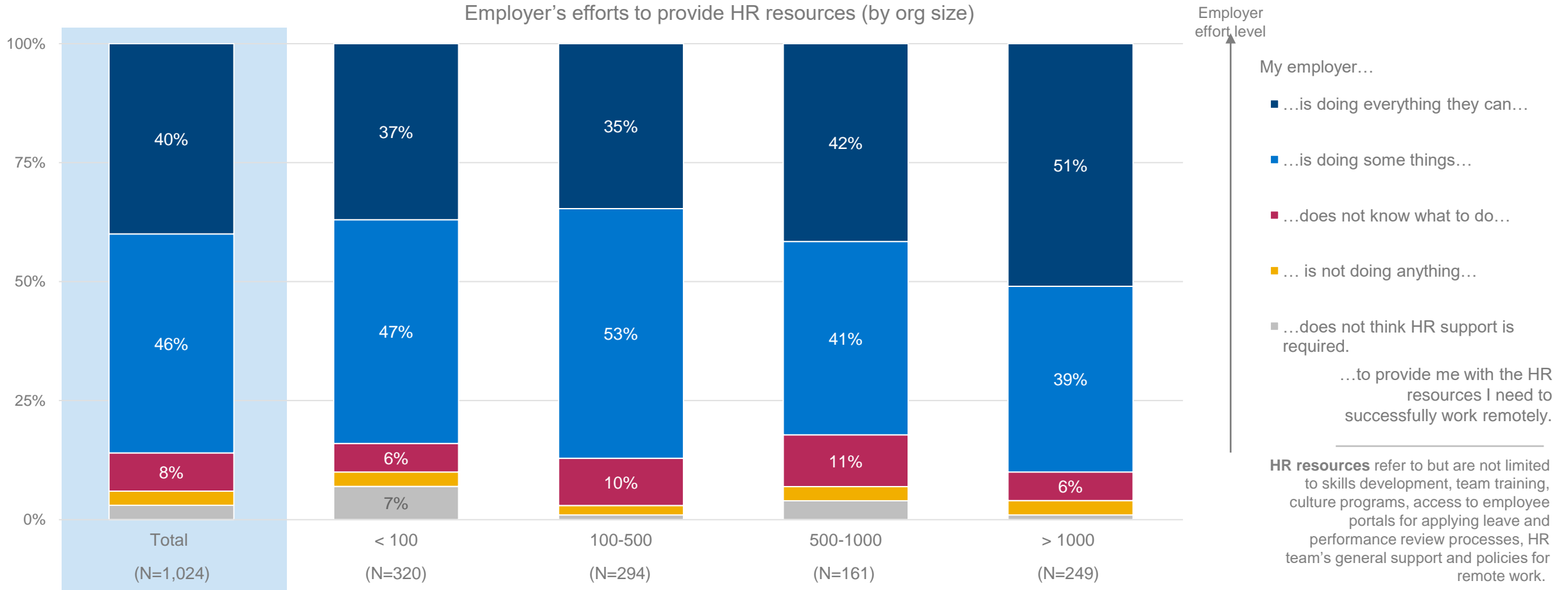


Q4. Thinking about HR resources to successfully work remotely, how would you describe your employer's efforts to provide them?

Gen Z: 18 to 23 years old | Millennials: 24 to 34 years old |
Gen X: 35 to 54 years old | Baby Boomers: 55 years old & above

Employees across organisations of all sizes agree that their employer is doing at least some things to provide HR resources for them to work remotely successfully

- More than half of the employees in large organisations (>1,000 employees) feel that their employer is doing everything they can to provide the HR resources necessary to work remotely successfully.
- Significantly more employees in small organisations of less than 100 employees feel that their employer does not think HR resources are required to work remotely successfully.

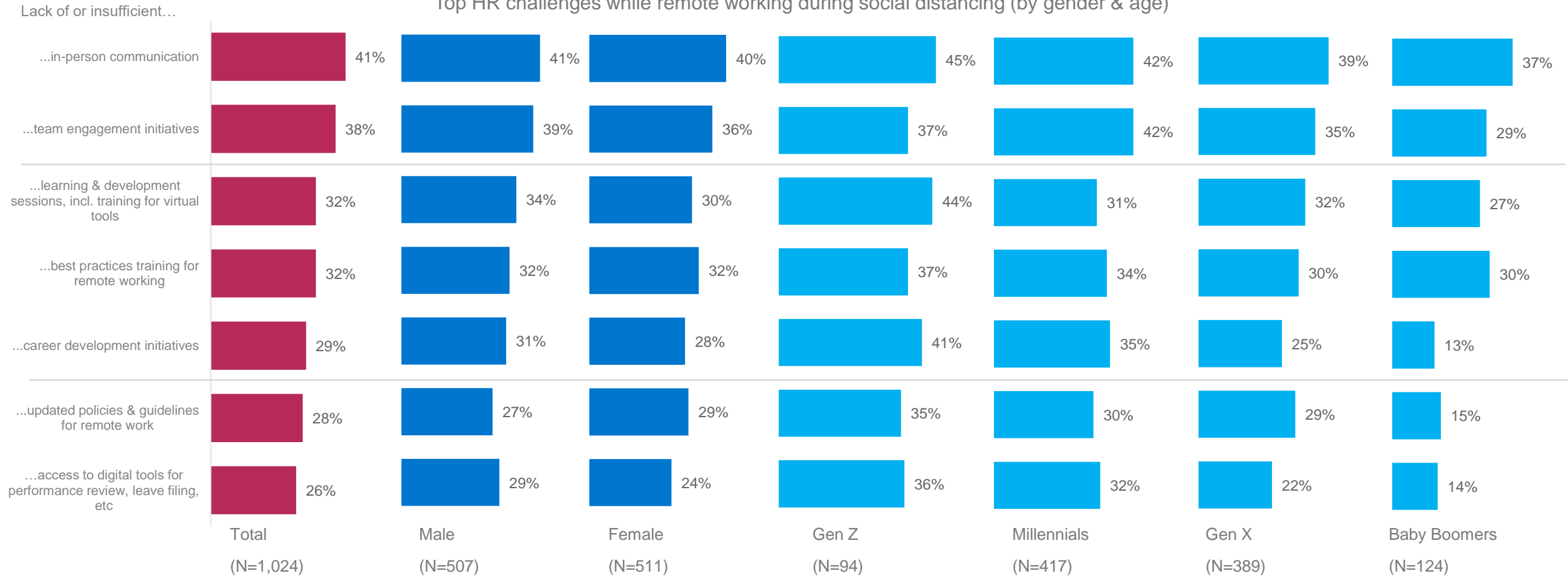


Q4. Thinking about HR resources to successfully work remotely, how would you describe your employer's efforts to provide them?

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

- Generally, the top three HR challenges faced by employees while remote working during social distancing are 1) lack of in-person communication (41%); 2) lack of or insufficient team engagement initiatives (38%); and 3) lack of or insufficient best practices training for remote working (32%).
- Gen Z employees also find the lack of or insufficient learning & development sessions (44%) and career development initiatives (41%) particularly challenging.

Top HR challenges while remote working during social distancing (by gender & age)

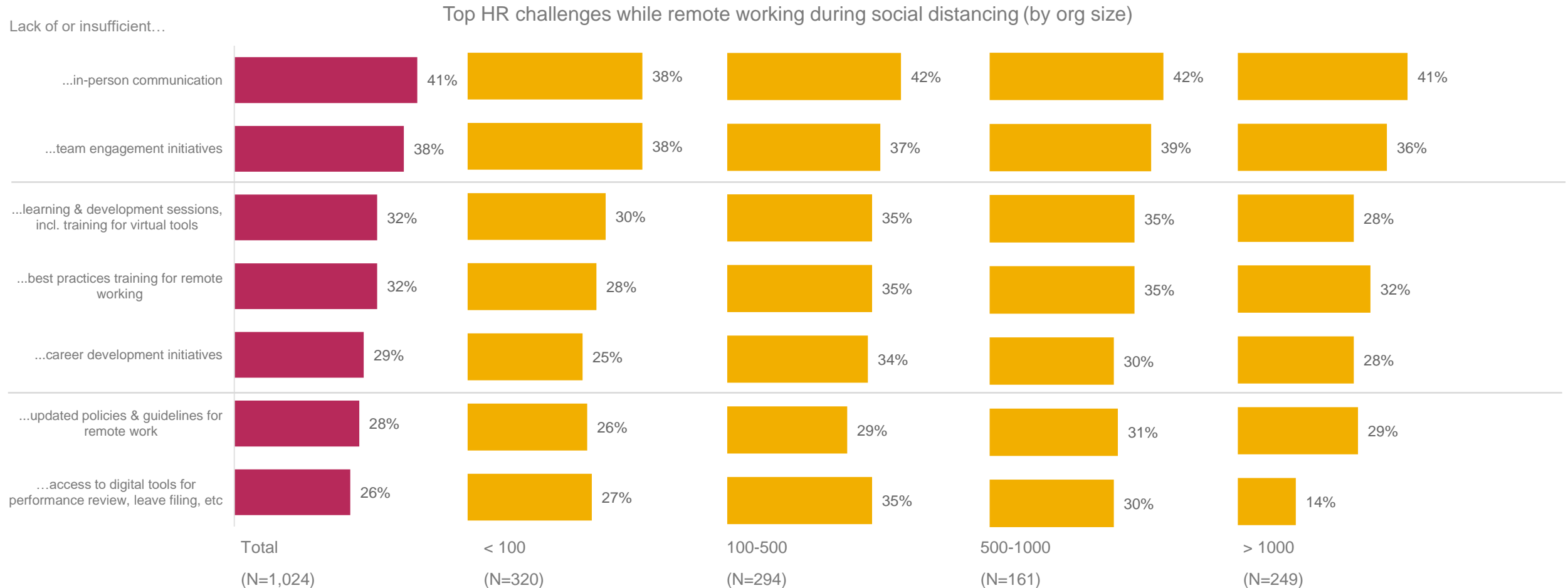


Q7. Thinking about remote work during social distancing, please select the top 3 HR challenges that you faced.

Gen Z: 18 to 23 years old | Millennials: 24 to 34 years old | Gen X: 35 to 54 years old | Baby Boomers: 55 years old & above



Lack of in-person communication consistently ranked the top HR challenge faced by employees across organisations of all sizes

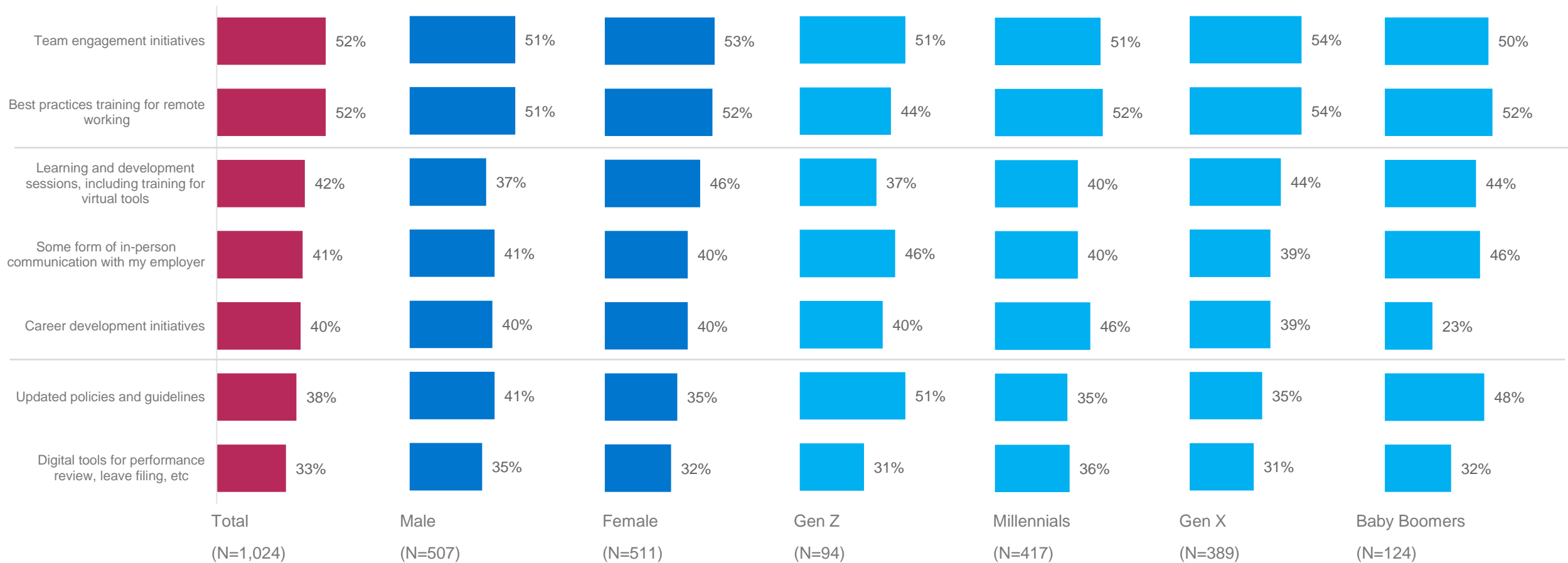


Q7. Thinking about remote work during social distancing, please select the top 3 HR challenges that you faced.

Employers must provide team engagement initiatives and best practices training for remote working

- The top three HR resources and support that employees need for long-term remote work are 1) team engagement initiatives and best practices training for remote working (52%); 2) learning and development sessions, including training for virtual tools (42%); and 3) some form of in-person communication (41%).
- Female employees value learning and development sessions, including training for virtual tools more, more than their male counterparts.
- Significantly more Gen Z and Baby Boomers feel company policies and guidelines need to be updated to accommodate long-term remote work.

Top HR resources & support employers must provide (by gender & age)



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.

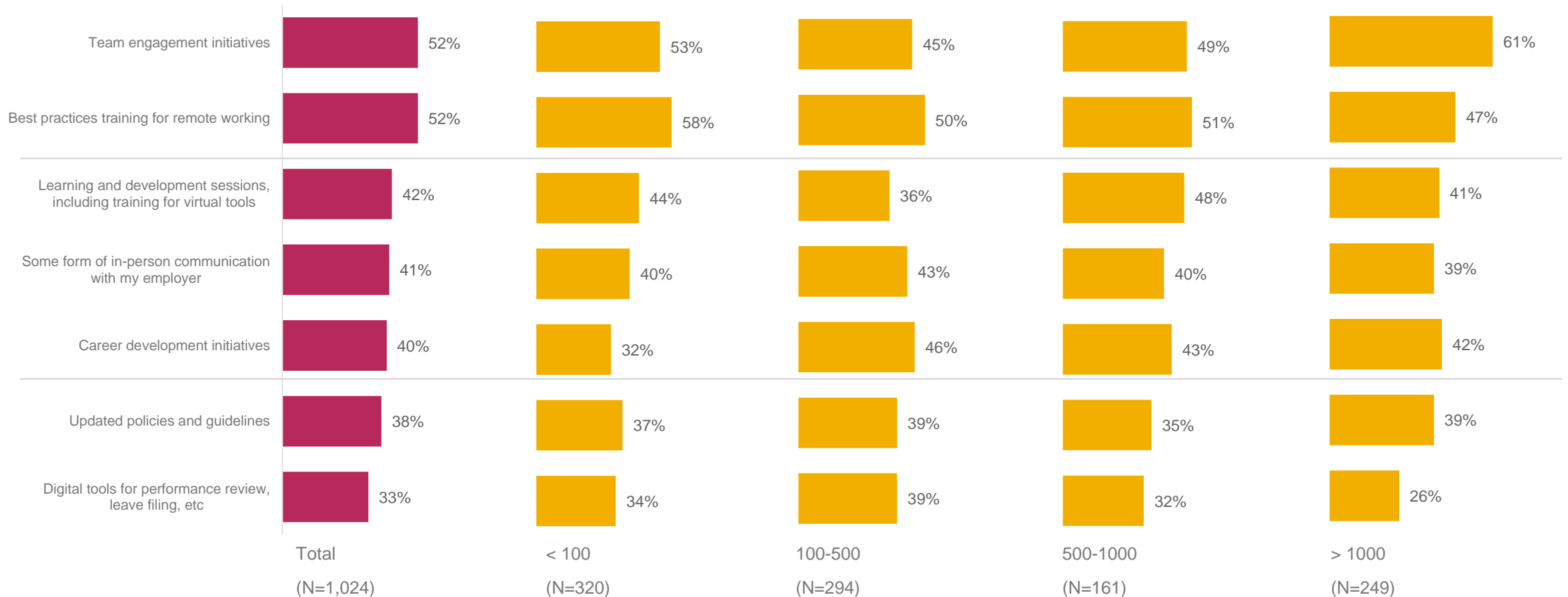
Gen Z: 18 to 23 years old | Millennials: 24 to 34 years old | Gen X: 35 to 54 years old | Baby Boomers: 55 years old & above



Employees in large organisations value team engagement initiatives most

- At least six in 10 employees from large organisations with more than 1,000 employees feel that employers must provide opportunities for team engagement during long-term remote work. This is closely followed by 47% who want best practice training for remote working.

Top HR resources & support employers must provide (by org size)



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.



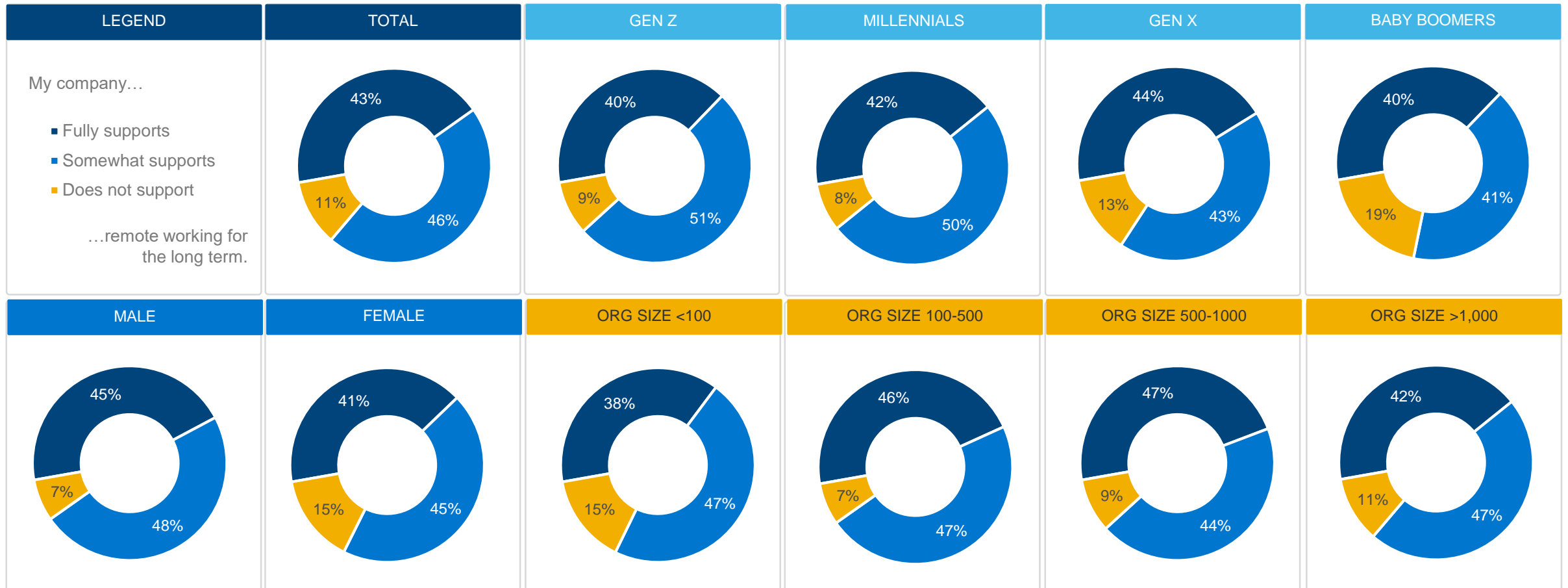
CONTENTS

1. OVERVIEW
2. KEY FINDINGS
3. ATTITUDES TOWARD REMOTE WORKING
- 4. TECHNOLOGY RESOURCES**
5. HR RESOURCES
6. READINESS FOR LONG-TERM REMOTE WORKING

Only four in 10 employees feel that their company fully supports long-term remote work

- Only 43% of employees feel that their company fully supports remote working for the long term.
- Of those who feel that their company does not support remote working for the long term,
 - More than twice the number of female employees (15%) feel this way compared to male employees (7%);
 - More Gen X (13%) and Baby Boomers (19%) agree with this statement compared to other age segments;
 - More employees from small organisations with less than 100 employees (15%) agree.

Company support for long-term remote working (by gender, age & org size)



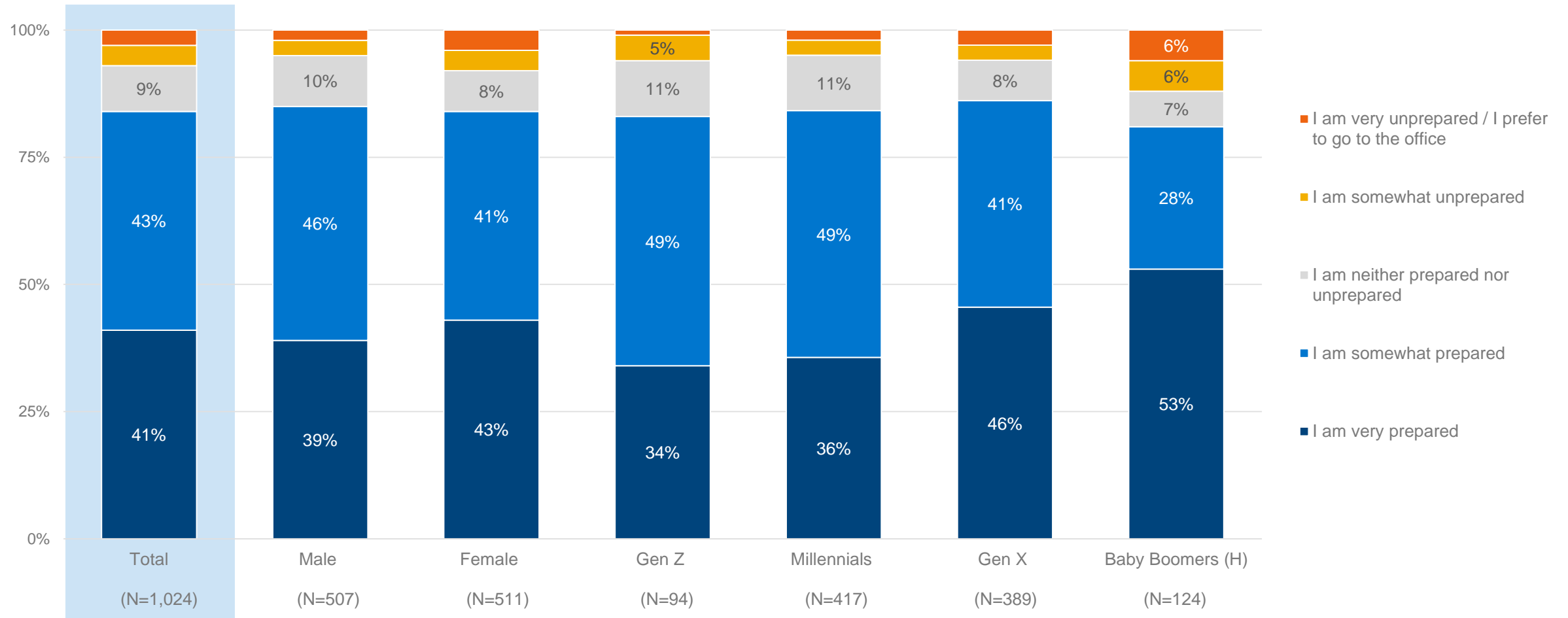
Q9. To what extent do you think your company supports remote work for the long term?

Gen Z: 18 to 23 years old | Millennials: 24 to 34 years old |
Gen X: 35 to 54 years old | Baby Boomers: 55 years old & above

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 work during social distancing.
- Interestingly, more Gen X (46%) and Baby Boomers (53%) are very prepared to work remotely for the long term compared to Gen Z (34%) and Millennials (36%).
- Baby Boomers also make up the largest percentage (12%) of those who are unprepared or prefer to go to the office.

Preparedness for long-term remote working (by gender & age)



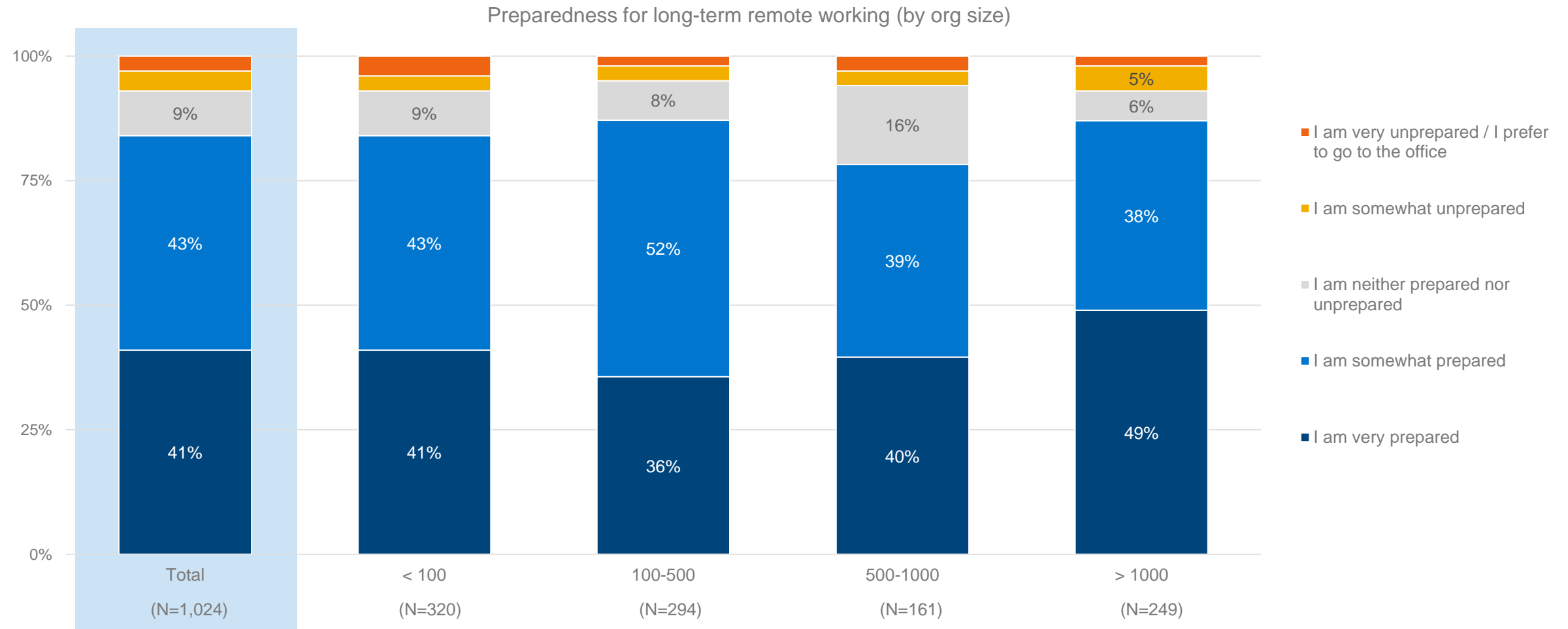
Q10A. Having experienced remote work during social distancing, rate how prepared you are to work remotely for the long term?

Gen Z: 18 to 23 years old | Millennials: 24 to 34 years old | Gen X: 35 to 54 years old | Baby Boomers: 55 years old & above



Employees in small to mid-sized organisations are more prepared for long-term remote work

- More employees in small to mid-sized organisations (100 to 500 employees) are prepared to work remotely for the long term, with 88% saying they are very prepared or somewhat prepared; followed closely by employees in large organisations (>1,000 employees) with 87%.

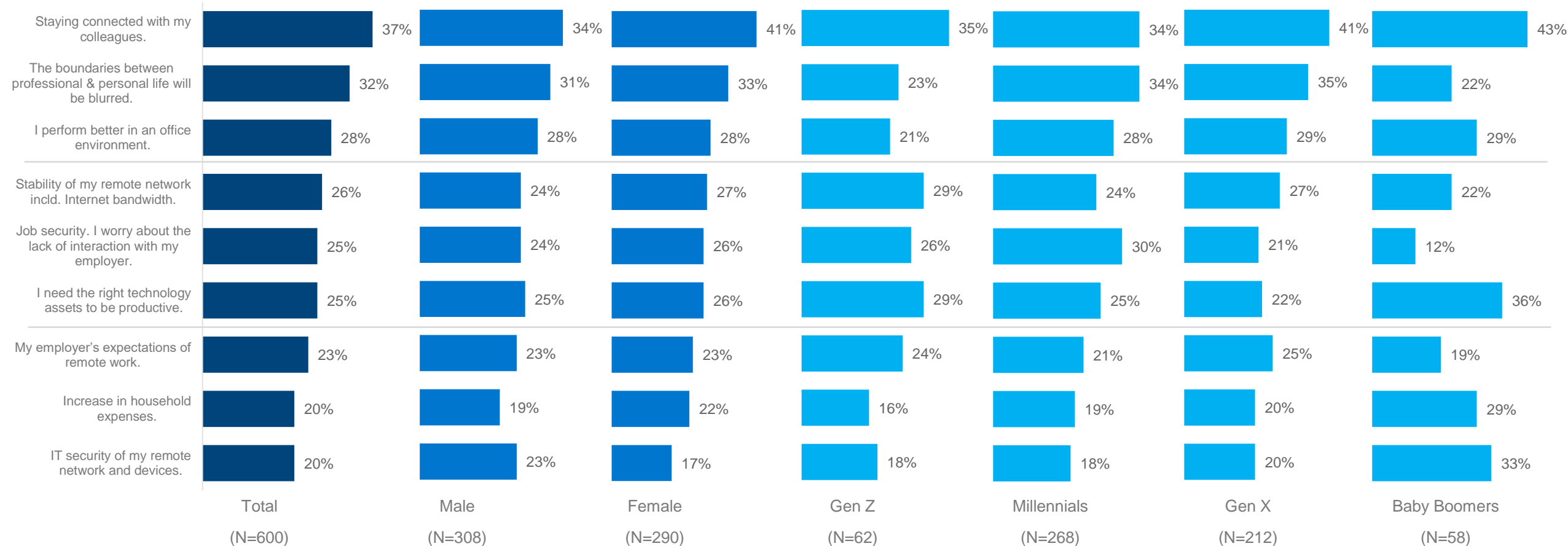


Q10A. Having experienced remote work during social distancing, rate how prepared you are to work remotely for the long term?

Employees are most concerned about staying connected with colleagues when it comes to long-term remote work

- Key concerns for employees who were not prepared to work remotely for the long term are 1) staying connected with their colleagues (37%); 2) blurring boundaries between professional & personal lives (32%), as well as 3) the ability to perform better in an office environment (28%).
- Millennials, more than any other age group, are particularly concerned about job security from the lack of interaction with their employer.
- Baby Boomers also worry more about IT security and needing the right technology assets to be productive, compared to their colleagues who are likely to have greater exposure to technology.

Top concerns on long-term remote working (by gender & age)



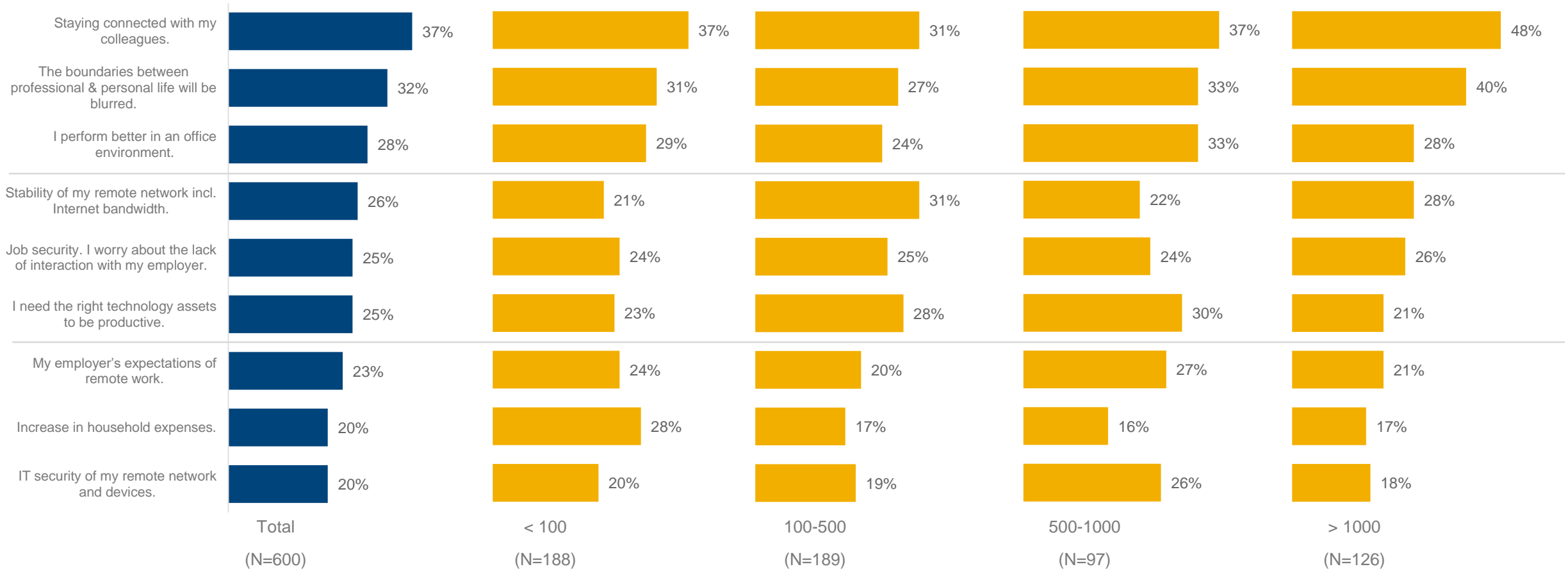
Q10B. Thinking about remote work in the long term, please select in order of priority your top 3 concerns.
Base respondents: Not fully prepared to work remotely for long term

Gen Z: 18 to 23 years old | Millennials: 24 to 34 years old |
Gen X: 35 to 54 years old | Baby Boomers: 55 years old & above

Employees in smaller organisations are more concerned about an increase in household expenses if they work remotely in the long term

- The top three concerns for long-term remote work are fairly consistent across employees in organisations of all sizes: 1) staying connected with colleagues; 2) blurring boundaries between professional and personal life; 3) the ability to perform as well in a remote environment
- Employees in small organisations of less than 100 employees also see an increase in household expenses as a concern.
- Other concerns seen in mid-sized to large organisations with 500 to 1,000 employees and large organisations with more than 1,000 employees are needing the right tech assets to be productive, and the stability of the employee's remote network, respectively.

Top concerns on long-term remote working (by org size)



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

DELLTechnologies