

SMALL BUSINESS

REMOTE WORKING REVOLUTION REPORT

2020



License & Disclaimer

The content in this report is copyright protected, and is property of Telsyte. The contents in this report cannot be re-purposed for re-sale or commercial blogging by any organisation. Any non-commercial media related citations, must include Telsyte as the source of the data & Zoho as the sponsor of the research. All trademarks referred to in this study remain property of the respective trademark holders, are only used by Telsyte to identify the respective holder's products and services and use by Telsyte in no way indicates any endorsement by or relationship with the respective trademark holder.

All surveys, forecasts, projections and recommendations made in this report are made in good faith on the basis of information available to Telsyte at the time; and Telsyte disclaims any liability for any loss or damage caused by errors or omissions, whether such errors or omissions resulted from negligence, accident or other causes. Neither Telsyte nor its agents will be liable for any loss or other consequences (whether or not due to the negligence of Telsyte or their agents) arising out of use of information in this report.



About the research in this report

About the research in this report

In preparing this study, Telsyte used an online survey of 1,017 business decision makers across Australian organisations with 100 or fewer employees. Nearly half (47% of respondents were from organisations with 5 or fewer employees.

The respondent was required to have a strong understanding of their organisation's software and technology purchasing and strategy. The sample is representative of the top 2,349,173 operating small businesses in Australia. The survey had a confidence interval of +/-3.07 at a confidence level of 95%.



About Telsyte

Telsyte is Australia's leading emerging technology analyst firm. Telsyte analysts deliver market research, insights and advisory into enterprise and consumer technologies. Telsyte is an independent business unit of DXC Technology.

Visit www.telsyte.com.au for more information.



About Zoho

With 45+ apps in nearly every major business category, including sales, marketing, customer support, accounting and back office operations, and an array of productivity and collaboration tools, Zoho Corporation is one of the world's most prolific software companies.

Visit www.zoho.com for more information.

Remote working is here to stay.

Zoho believes the COVID-19 pandemic will accelerate small businesses to adoption of cloud technologies to better manage costs, with enabling remote working a key consideration.

Technology platform Zoho, together with Telsyte, surveyed more than 1000 Australian SME leaders in March 2020 to understand how they are working remotely, as many countries were considering lockdowns. In Australia, nearly 1 in 3 had remote working capabilities already for their employees, with many more considering it.

The use of technology to conduct business on a remote basis has been steadily growing in Australia with the increase of cloud-based technologies available to businesses of all sizes. Technology has allowed small and micro businesses to be virtually run from anywhere connected to the internet for meetings, customer engagements, accounts and many other functions including marketing automation.

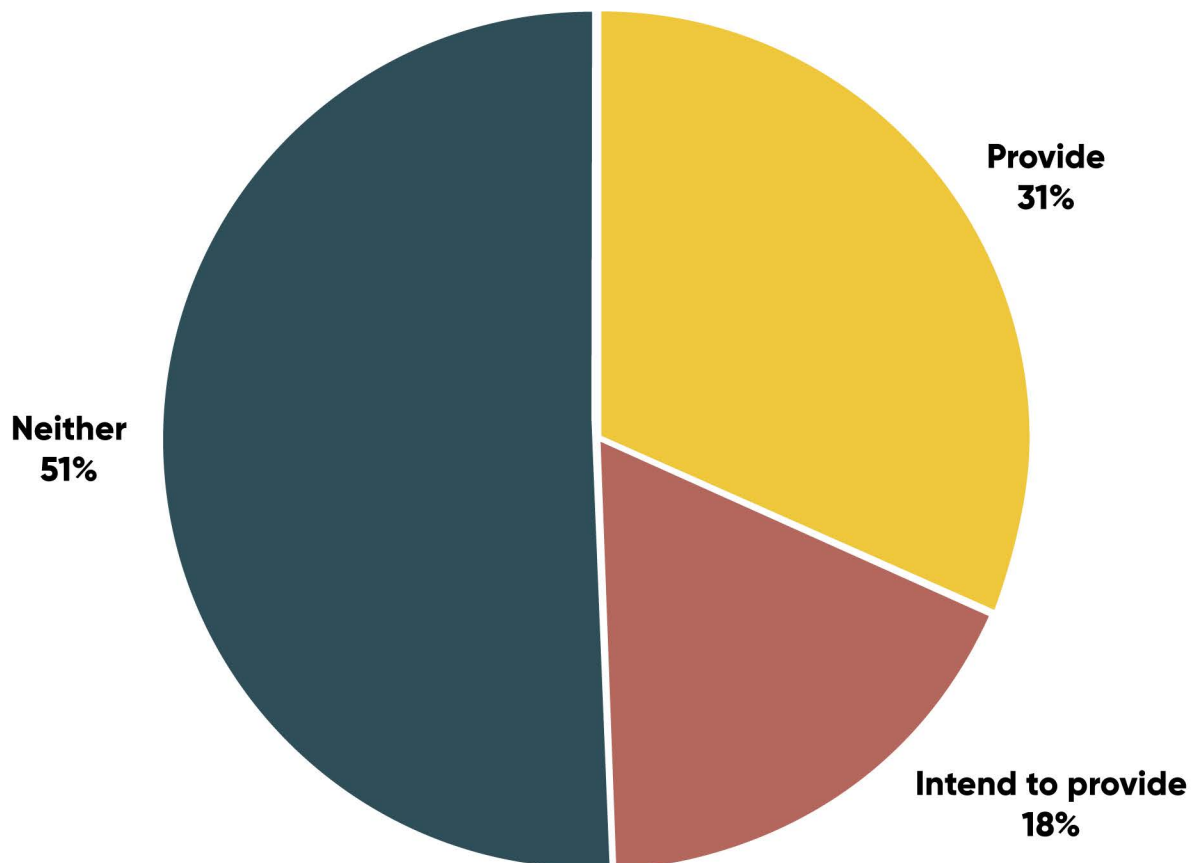
The research found that remote working was a growing preference for many small businesses, even before the COVID-19 pandemic hit Australia. Nearly half of small businesses prefer to work outside of a central office when possible (including work from home), given the individual and organisational benefits that arise from less travel time. Average commute times are closing in on an hour (52 minutes) for small business leaders, time that could be better utilised with remote working. With the daily commute costs for SME leaders at approximately \$9.5 per work business day, the savings are considerable when annualised, even if a few days a week.

Despite this, organisations still recognise the challenges with more flexible work locations, including managing employee productivity, connectivity and security issues. However, given the forced lockdowns, many small businesses have implemented processes to better manage their remote workforce and are increasing their investment in security for remote workers.

Almost 1 in 3 small businesses provided remote working opportunities prior to COVID-19 lockdowns.

Many small businesses were already gearing up for the remote working revolution – COVID-19 has ramped up the number of companies working from home and we expect this trend to continue when lockdowns are lifted.

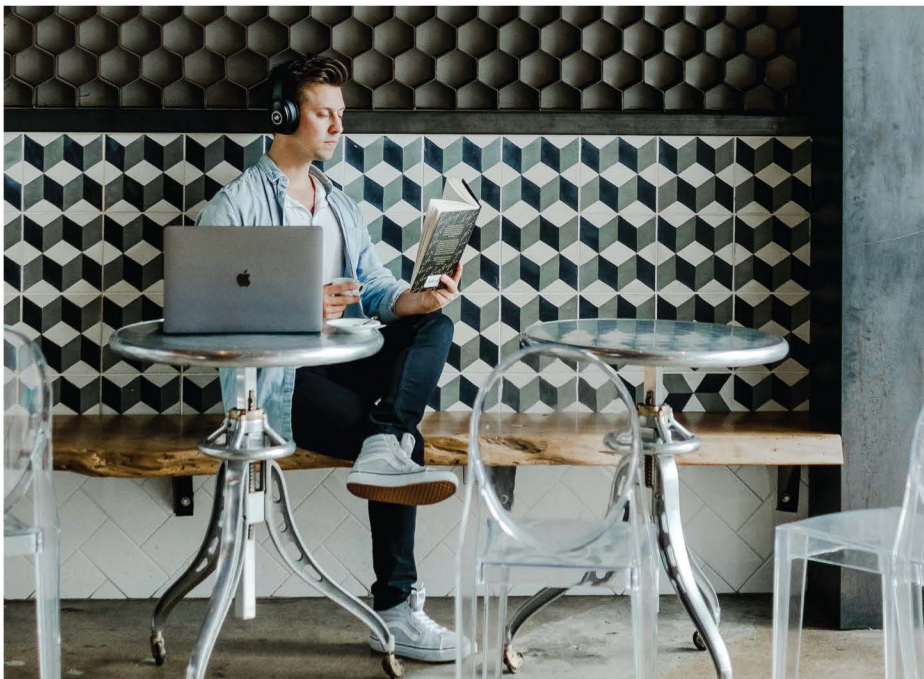
Q: Does your business currently provide (or intend to provide) working remotely anywhere in Australia for employees?



Remote working can unlock more than just time and money for small business leaders.

On average, small business leaders spend 52 minutes commuting to and from work each day. Not only can remote work improve operational efficiencies and provide a more appealing model for employees, but there are also significant cost savings to be had.

The current daily commuting cost for metro-based small business owners is \$10.50 a day and \$7.50 for non-metro based businesses. In a post-COVID-19 world, when budgets and expenditure will likely be under increased scrutiny, cost savings may be a particularly important consideration.



47% of small business leaders say if they could work remotely, they would choose to do so.



45% of small business leaders say if they can work remotely they can "unlock" free time.



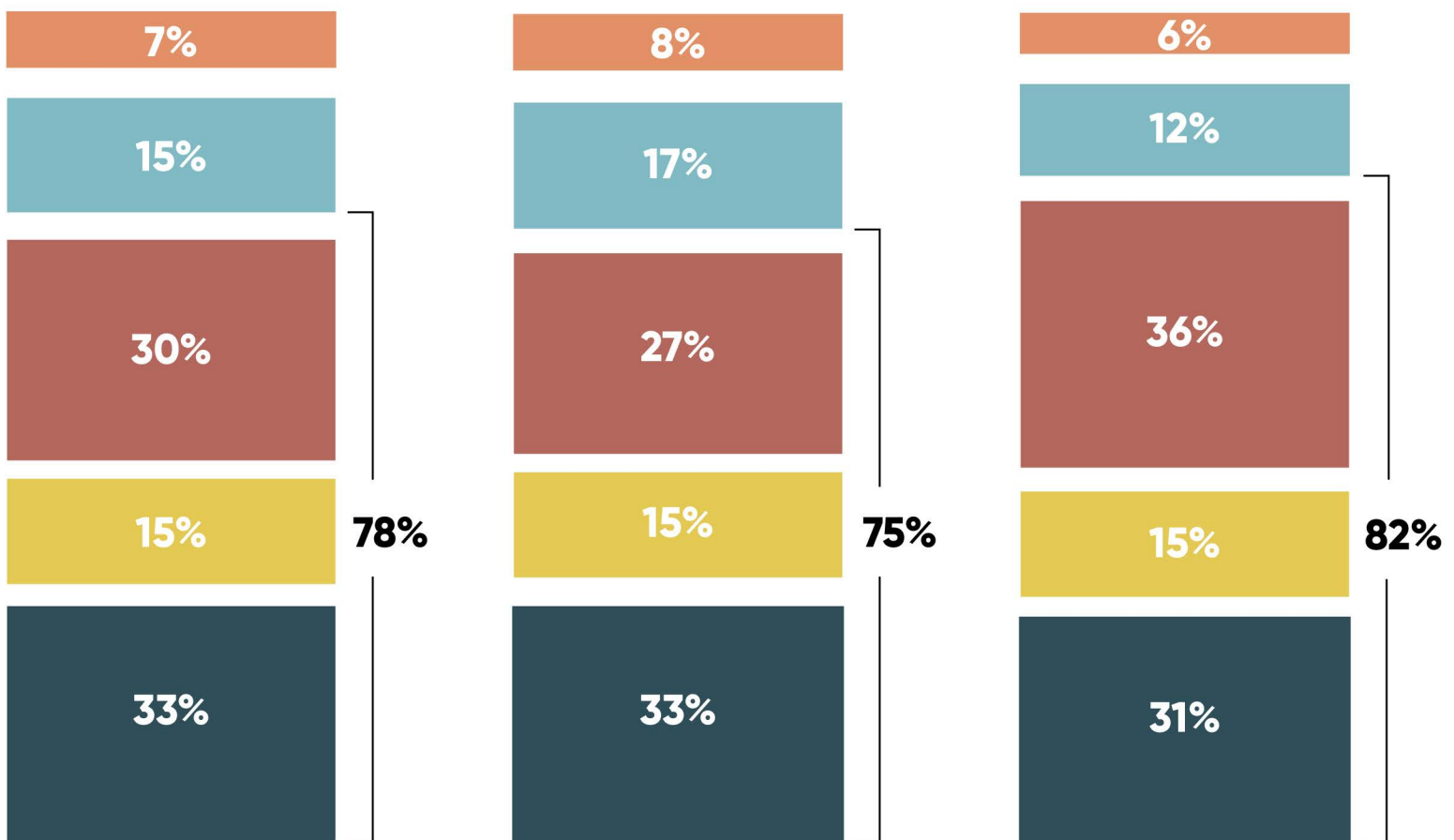
1 in 5 (22%) of small business leaders say their current work arrangements limit the time they can spend with their family or friends due to commute time.

Remote working more prevalent in regional Australia.

The tyranny of distance is sparking a remote working revolution in Australia's regional communities where digital transformation has long been considered a key necessity for regional businesses to thrive. The research shows remote work is currently more prevalent in non-metro areas, with 82% of business owners working from home at least one or two days a week compared to 75% of metro businesses.

Q: Do you ever work from home?

- Yes - Always
- Yes - Regularly (1 - 2 days)
- Yes - Most of the time (3 - 4 days)
- No - Would if I could
- No - Would not consider

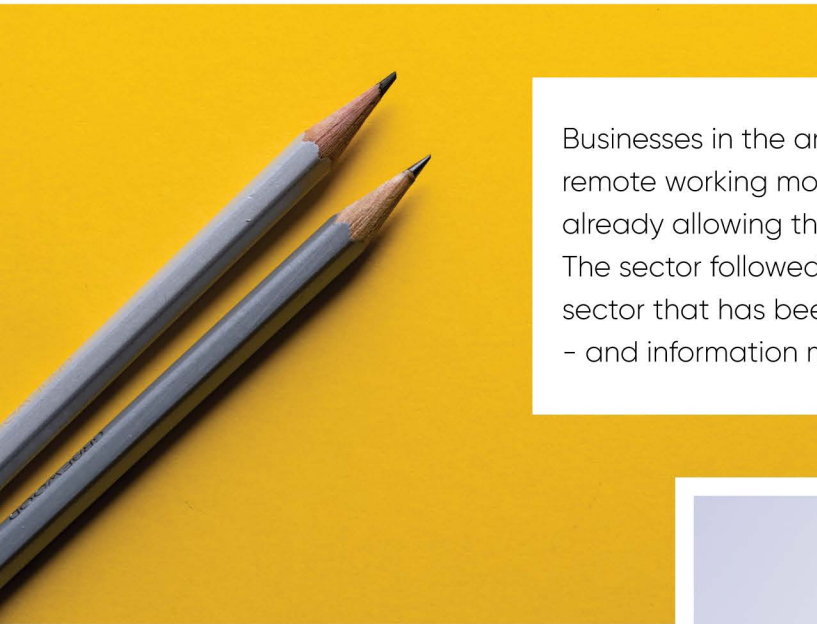


Total (n = 1,017)

Metro (n = 568)

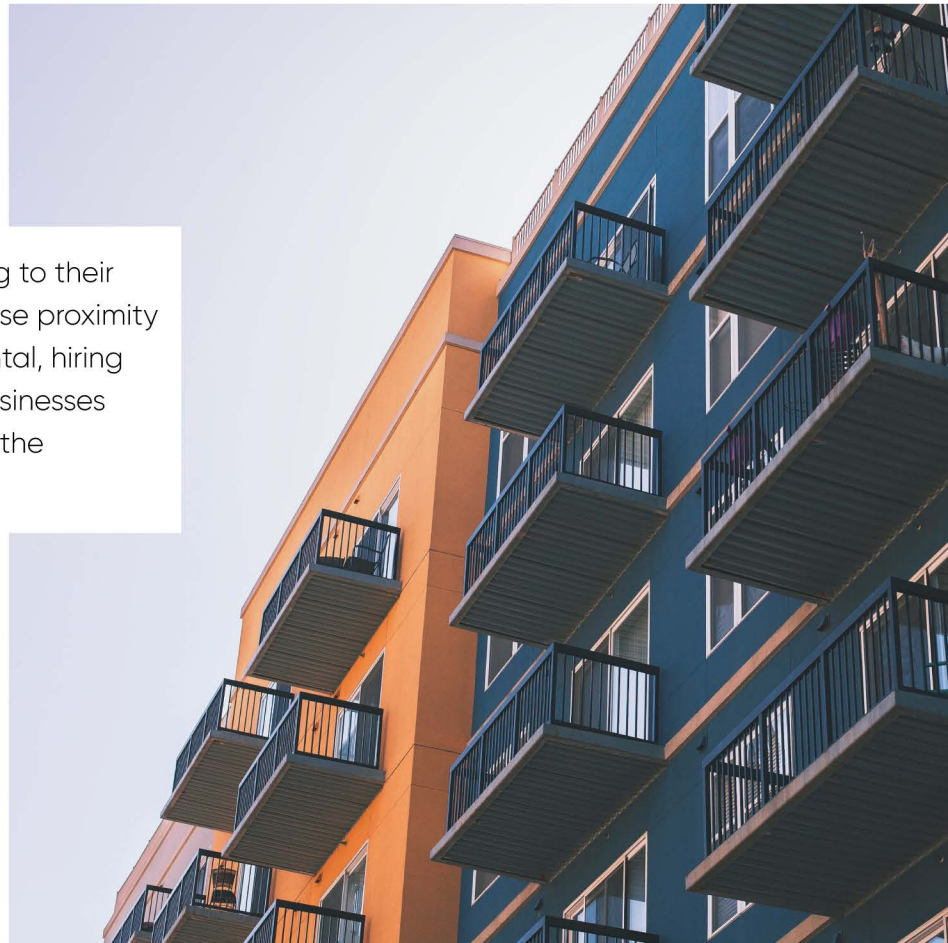
Non-metro (n = 449)

Arts, tech, and education industries most remote savvy.



Businesses in the arts and recreation sectors are currently embracing remote working more than any other industry, with nine in ten (89%) either already allowing the practice or intending to implement it in the future. The sector followed by the education and training (79%) industries - a key sector that has been forced to rapidly adapt its model during the pandemic - and information media and telecommunications (79%).

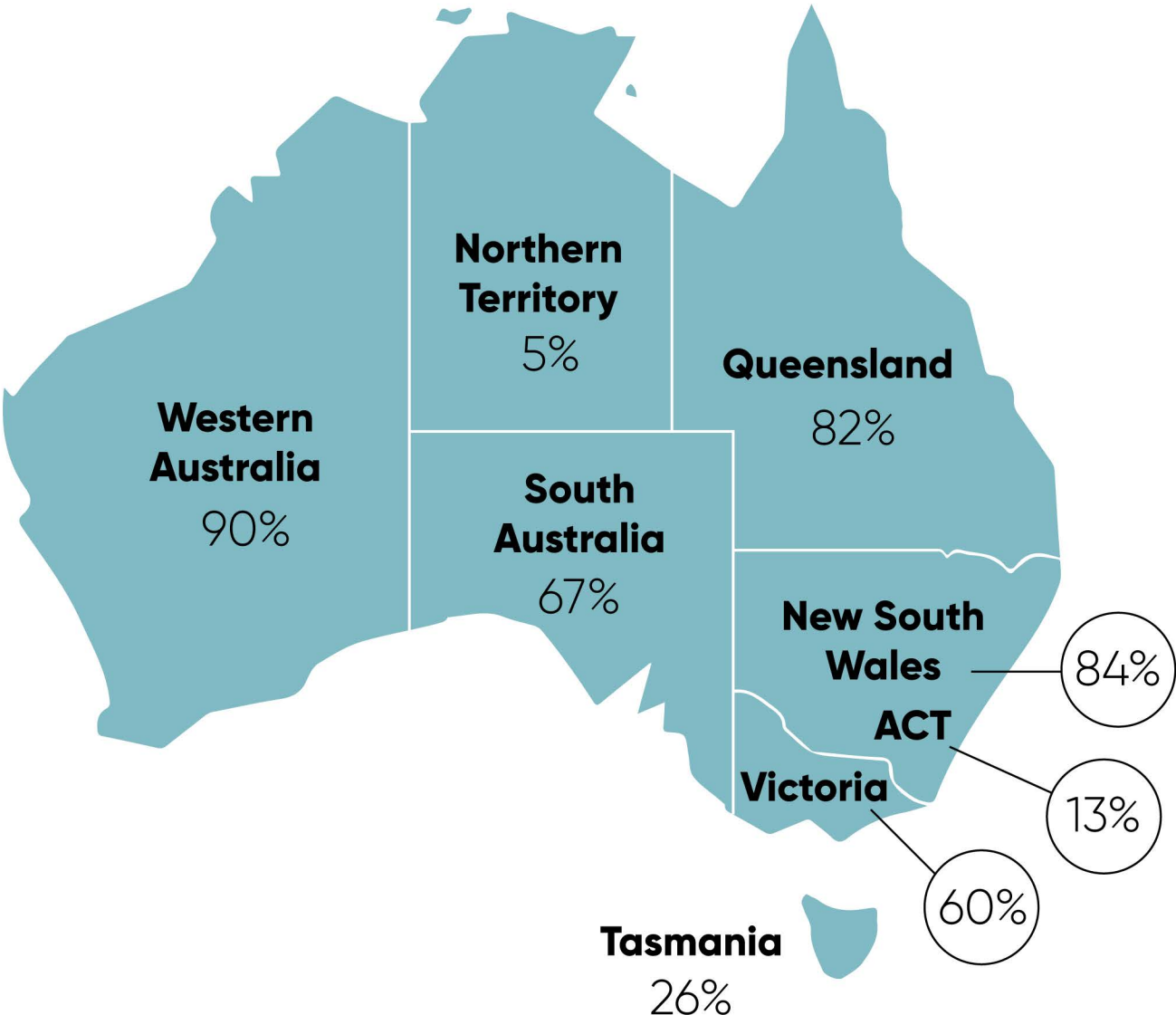
Industries that don't readily offer remote working to their employees currently, are those which rely on close proximity to a particular location like, for example, the rental, hiring and real estate industries, where only 20% of businesses allow, or intend to implement remote work, and the agriculture industry (21%).



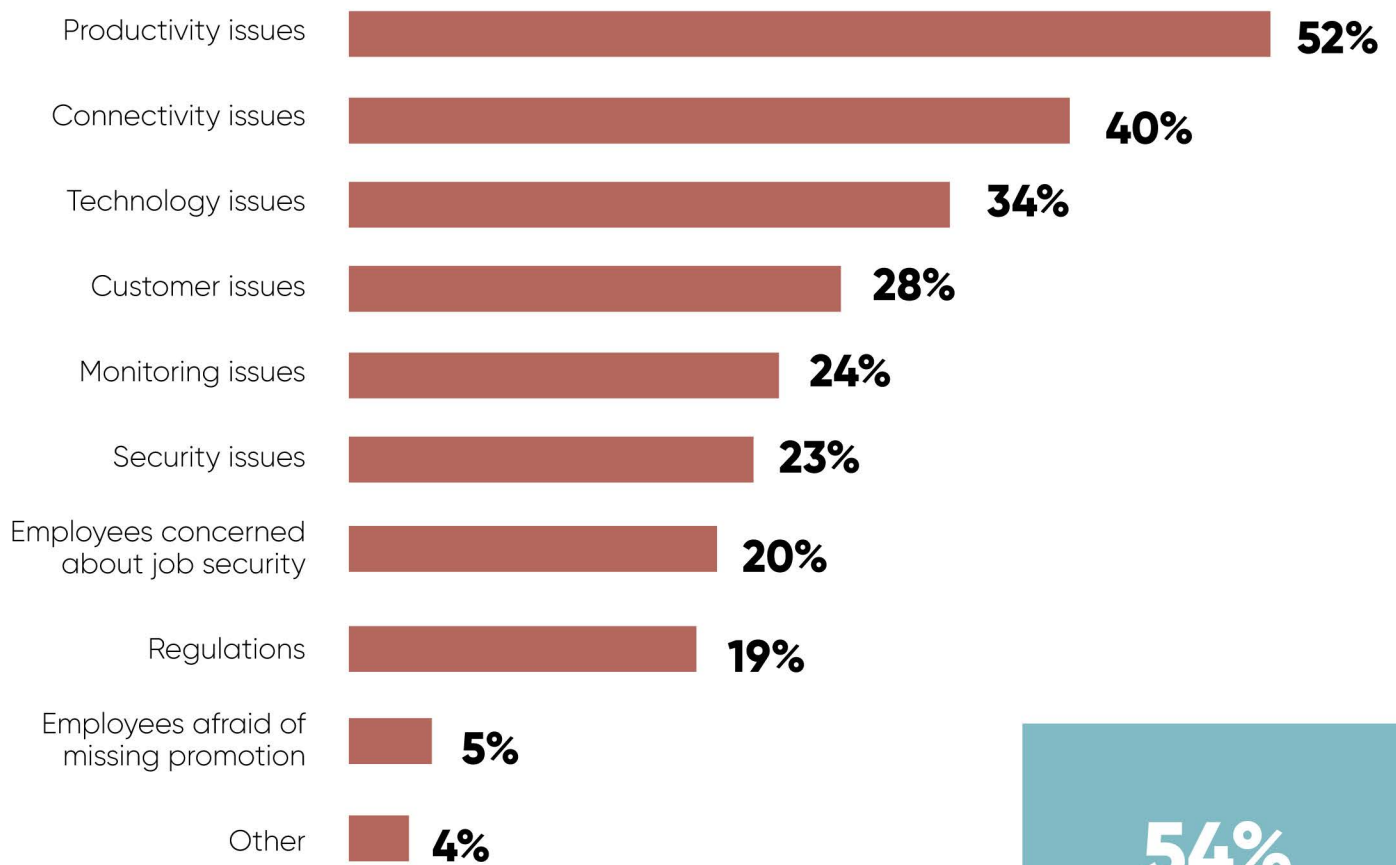
Battle of the States.

WA, NSW and QLD lead the remote working charge.

Remote working uptake varies by state, with small business owners in Western Australia the most likely to work remotely - 90% do so at least one or two days a week, followed by New South Wales (84%) and Queensland (82%). By contrast, that number drops to 60% for business owners in Victoria and only 50% for those across ACT, the Northern Territory and Tasmania combined.



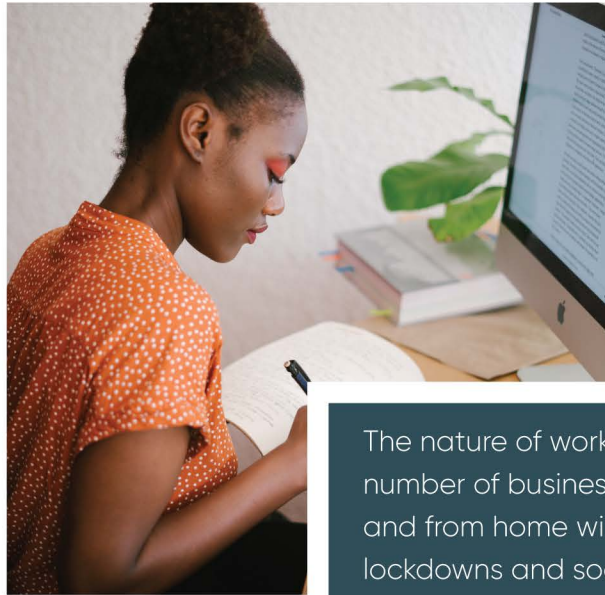
What's holding back the other half of Australia's SMB's from working remotely?



54%
of small businesses
encounter challenges with
flexible work arrangements



In conclusion...



The nature of work will change forever as the number of businesses deciding to work remotely and from home will skyrocket, even after lockdowns and social distancing restrictions are lifted. If there's one thing business owners and workers are understanding in the wake of COVID-19, it's that a job is something you do rather than somewhere you go.



Brought to you by

