



Remote Working in South Africa 2020

A study conducted by
World Wide Worx for Cisco Systems



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Foreword

Remote working readiness in South Africa

By **Garsen Naidu**, Cisco country manager South Africa

At the outset, 2020 began with the leading organisations in the technology industry, including us at Cisco, presenting outlooks on trends predictions for the IT sector in 2020 and beyond. Yet, no one could have anticipated the Covid-19 crisis and its impact on the entire global business landscape. In a turn of events, the pandemic caused a major shift, which saw multitudes of the world's workforce working remotely from home; with digital technology as an enabler of business continuity in this new reality.

Suddenly, millions of companies relied entirely on technology to do work without stepping into the office, as governments called for lockdowns in a bid to curb the spread of the Covid-19 virus.

How we do work and where we do work are actions that have taken on a new form. Though offices were largely closed, this did not mean the end of employee productivity. The availability of digital applications and solutions that power remote working has enabled South African companies to go on. Yet, we must not forget that a significant proportion of South African employees do not work in an office environment. However, with digitisation, technology is impacting all sectors of the economy, from manufacturing to agriculture.

This highlights that while the impact of digitisation is widespread, the benefits it yields are distributed unevenly. Technology can help solve the world's most pressing problems. It can connect governments to their citizens and provide access to new forms of education and healthcare services. In every corner of the world, digital technology is helping us become more connected to each other and to the organisations upon which we rely and opening markets and creating new opportunities for employment.

However, while the technologies for creating a strong digitally capable society are becoming mature, not all countries are able to wield them effectively. These countries (in this case, South Africa) risk their citizens missing out on the many benefits of the digital era.

Benjamin Franklin once said: *"By failing to prepare, you are preparing to fail"*. Likewise, in the context of the new norm, the importance of having a digital transformation strategy already in place to be able to tackle unprecedented situations such as this one, has shown its value.



However, many organisations had not yet fully adopted the use of digital technology to streamline business processes. The level of technology availability, its utilisation, and adoption, reflects a country's current level of digital readiness. South Africa currently ranks 78th on the Digital Readiness Index that was published by Cisco in early 2020.

While most organisations are along their digital transformation journey, the lockdown forced businesses to speed up one specific area of digitization: their remote working strategy.

At Cisco South Africa, we deemed it important to contribute research to help the continuing dialogue on technology's future impact, the way of work and the workforce. We conducted research to gain a better understanding of how South Africa is faring with the new norm of a remote working culture and what the future may look like as a result of the impact of the crisis – which could change things forever.

The remote working research study explored which emerging technologies South African organisations are using. And, as expected, Cloud computing is at the heart of collaborative, remote working. This became evident when nearly three-quarters of businesses reported that cloud-based software has been very helpful with respect to productivity since the start of the pandemic and the surrounding restrictions.

Another very important component of a remote work setup is ensuring the remote workforce is secured; which has an impact on companies' data security strategy as cybersecurity remains a growing concern – especially during these times.

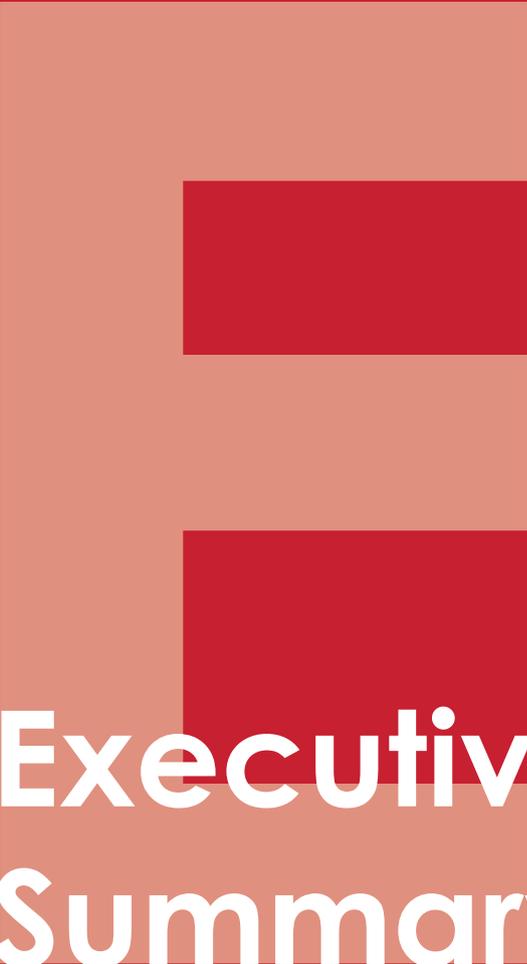
Furthermore, from a collaborative culture perspective, 91% of decision-makers reported their employees were very cooperative when working from home, indicating there is a good foundation to build on for the medium to long term.

The global pandemic is, unfortunately, having a big impact on mental health, and this has shone a light on employee stress, anxiety, depression and overall wellness. Employee stresses have ranged from creating a workspace at home while juggling family responsibility, job security, global uncertainty about the future and the lack of certainty regarding lockdown regulations.

It is important to note that the current global pandemic is but a temporary setback. In planning a future beyond it, companies will have to make key considerations for a remote working strategy in future. Once the crisis is over, will their stance on remote work change? Will they allow employees to continue working remotely or introduce more flexible work structures?

Finally, while the advent of the 4th Industrial Revolution (4IR) and its advanced technologies was at some point met with scepticism and perceived as a threat to jobs, what these technologies have enabled us to do during this unprecedented time might shift our perception of the revolution from here on out.

This research will allow us to gauge how we as South Africa, can transform.

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Executive Summary

Digital transformation key to remote working productivity

A new study has shed light on the secret to maintaining productivity during remote working.

According to *Remote Working in South Africa 2020*, a study conducted among 400 enterprises by World Wide Worx for Cisco Systems, the shift to remote working has led to improved productivity for only 29% of companies. However, among companies that had already fully rolled out digital transformation strategies, productivity leaped by a massive 70%.



“Digital transformation emerged as the key differentiator in remote working productivity and collaboration,” says **Arthur Goldstuck**, managing director of World Wide Worx and lead analyst on the project.

At the time when remote working became mandatory, 37% of companies were well-prepared for it as they had fully rolled out a digital transformation strategy, defined as the digital enablement of all processes within an organisation.

While remote working has been quite an adjustment for both companies and employees, many have managed to transition seamlessly. Countless individuals have been able to get it right because of digital enablement. Having thus seen the efficiency and impact of this, 38% of the study’s respondents said they would allow staff to continue working from home after the crisis is over. While this was not a factor of digital transformation, it was also correlated with a small increase on productivity.

*“It is clear that the more a company embraces digital evolution, and the more willing it is to allow its employees to do so, the more it will benefit in terms of productivity,” says **Goldstuck**. “The digitalisation of the office is not only about the shift from physical to digital, but about a clear strategy behind both digitalisation and its intended benefits.”*



"The level of technology availability, its utilisation, and adoption, reflects a country's current level of digital readiness," says **Garsen Naidu**, Cisco South Africa country manager. While 37% of companies indicated being digitally ready with digital transformation strategies in place, there is still a long way to go to realising complete digital transformation for the entire business landscape. On a global scale, South Africa currently ranks 78th on the **Digital Readiness** Index that was published by Cisco in early 2020. This statistic further highlights that even with South Africa's low ranking, multiple businesses still see themselves as already digitally transformed. This reflects a disparity between the companies' transformation journey versus the country's transformation journey and infrastructure capabilities. Therefore, South Africa's digital transformation is mainly lead by its business sector. The country falls short due to its lack of education on technological information and digital migration nationally.

"We deemed it important to contribute research to help the continuing dialogue on technology's future impact on companies, the way of work and the workforce."

Other key findings of the study include:

The Covid-19 crisis gave a wake-up call for digital transformation

For most organisations, remote working devices were not issued until it was necessitated because of the Covid-19 crisis as staff had to be able to continue working from home.

- Before the lockdown, 57% of businesses had issued less than quarter of their staff with laptops for remote work. Only 25% of respondents said that more than half of their staff were given laptops for remote work.
- After lockdown, companies reported, the latter group leaped to 53% category, while the former dripped to 28%.
- The finding: Many companies could always work from home, but needed a push to make digital transformation happen.

Ongoing digitalisation was the training ground

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The study found that 70% of employees were generally well prepared for working from home when the lockdown was announced. Remote work tools, such as collaborative tools, were to some extent already being utilised by South Africa citizens.

- This shows training was generally not needed for using remote work tools, showing digital transformation was taking effect before the lockdown restrictions were installed. In short, work-from-home environments had already begun.
- The finding: Many employees don't need training for work-from-home tools. This is because ongoing digitalisation has already trained them.

Happy home – happy worker

Perks such as parents being able to spend more time with their children (94%) and the ability to maintain connectivity with colleagues (93%) were reported as some of the strongest success factors for employers.

- Another strong success factor underpinning this was that having tasks written out digitally allowed for better delegation (96%). Overall, the research shows employers were happy with delegating tasks digitally.
- The finding: the digitalisation of the office must take into account the personal circumstances of the employee.



Connectivity is key

Nearly all (97%) IT decision-makers reported that employees were less stressed at home if they had connectivity, compared to those who didn't have connectivity at home – at a significant 10% lower.

- The finding: While working from home, connectivity is as an important factor for enforcing synergy with colleagues, which also alleviates stress and anxiety for employees when they do feel part of an active team.

Working from home didn't translate to higher – or lower outputs

Only 3 in 10 (29%) IT decision-makers reported higher outputs from employees as a result of working from home, but none (0%) reported lower outputs. This highlights the fact that employees are still as productive as they were in the office, partly as a result of not spending time getting to the office and settling in – but no more productive.

- The finding: That outputs do not increase despite less time spent in traffic or in settling down is telling; it suggests that an employee's mental energy remains finite, within the context of traditional roles, job descriptions – and tools. This finding changes radically when digital transformation is added to the mix.

The digitally transformed verses those that are still transforming

For those respondents who were fully digitally transformed ahead of lockdown and remote working, productivity leaped to 70%, compared to the 29% increased productivity of companies which were not far along their digital transformation journey. This starts to paint a picture of higher productivity when working remotely – when a digital transformation strategy has been fully rolled out.

- Finding: The productivity benefits of remote working are directly tied to digital transformation strategy, and not simply moving from a physical to digital working environment.

Remote working increases work stress

The perception that remote working is more relaxed is rejected by respondents to this study. Two-thirds of IT decision-makers (64%) report that it does not lead to less stress for employees. Nine out of ten (90%) say that it does not result in less stress for themselves.

- Work stress from remote working can be attributed to the uncertainty surrounding the Covid-19 crisis, its impact on job security, as well as reduced earnings for many.
- Employees are, in effect, contactable at any time of day, and in many cases are being actively monitored throughout the work day.
- These stresses affect managers even more than regular employees as they attempt to navigate new ways of overseeing workers, and experience their employees' stress as well as their own.
- The finding: In unfamiliar territory of remote working, organisations must take into account the added stress of new pressures, demands and working experiences. This highlights the need to avoid adding to the pressure with additional monitoring or output demands.

Cloud computing is at the heart of remote working

A massive nine out of ten respondents (89%) reported that cloud computing had helped the business remain productive during the Covid-19 crisis. More remarkable was the proportion that said it has been “very helpful” – 73%.

- The finding: The cloud is at the heart of collaborative, remote working.

Conclusion

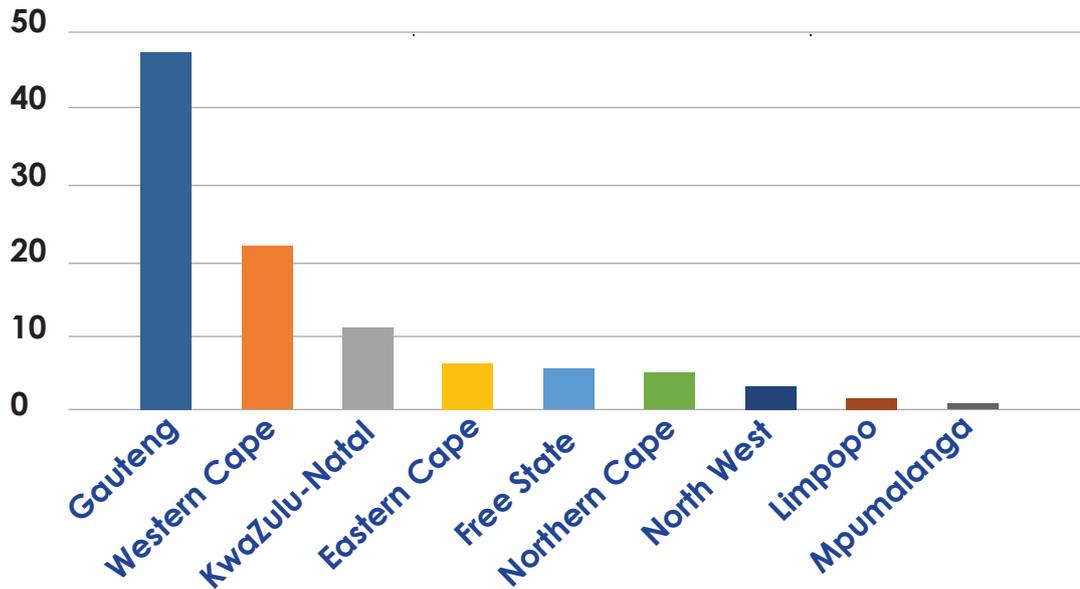
The strategic drivers for digital transformation are also the strategic drivers for increased productivity. Without a strategic imperative, the benefits are more thanks to a scattergun approach, with far fewer enjoying them. The digital office is not simply a physical shift from the traditional office to the home office, or the embrace of digital collaboration, but a strategic shift in the way an organisation operates.



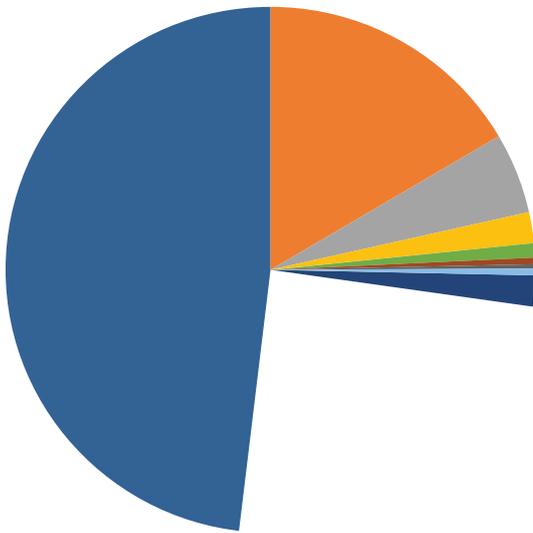


Demographics

Province



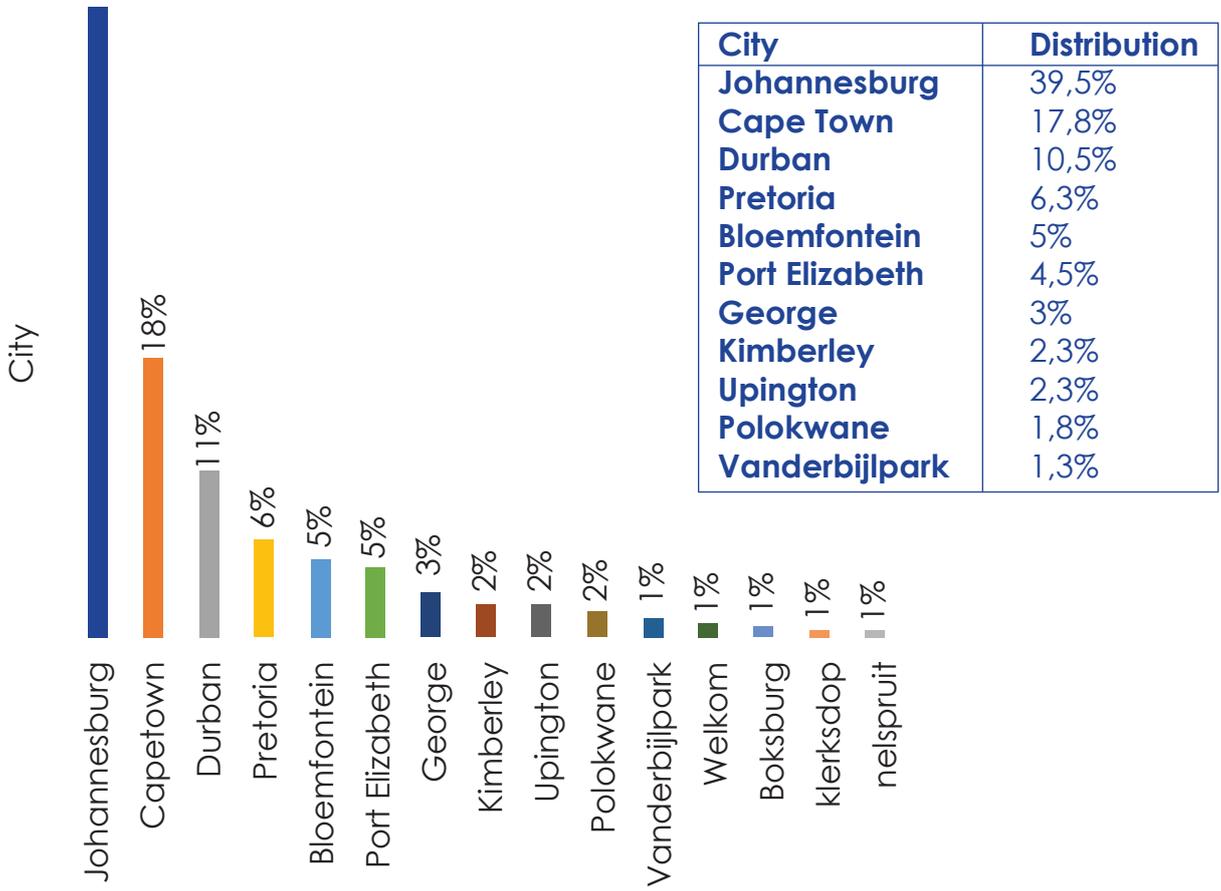
The provincial spread was purposely set to reflect the business hubs of South Africa. As a result, the largest proportion of respondents is from Gauteng, at 48%, followed by the Western Cape, at 21%, and KwaZulu-Natal, at 11%.



Gauteng	48%
Western Cape	21,3%
KwaZulu-Natal	10,5%
Eastern Cape	5,5%
Free State	4,8%
Northern Cape	4,8%
North West	2,5%
Limpopo	2%
Mpumalanga	0,8%

City

As with provincial selection, cities were purposely selected to reflect business hubs of South Africa. As a result, Johannesburg holds the largest proportion of respondents at 40%, followed by Cape Town, Durban, and Pretoria, at 18%, 11%, 6% respectively. The following table only shows the centres with more than 1% representation.



Industry



Industry	Distribution
Information & Technology	11,8%
Insurance & Financial Services	11,8%
Manufacturing	11,8%
FMCG	10%
Logistics & Distribution	8,3%
Engineering & Construction	7%
Retail	4,5%
Healthcare	3,5%
Automotive	3,3%
Travel & Tourism	3,3%
Telecommunications	3%
Service Providers	2,8%
Administration & Support Service Activities	2,3%
Agriculture	2,3%
Banking	2%
Real Estate	2%
Accountants	1,3%
Media, Publishing & Advertising	1,3%
Mining	1,3%
Suppliers	1,3%
Chemicals & Pharmaceutical	1%
Education	1%
Entertainment & Lifestyle	1%
Government	0,8%
Legal	0,5%
Transportation	0,5%
Contractors	0,3%
Farming Equipment	0,3%
NGO & NPO	0,3%
Utilities & Energy Services	0,3%

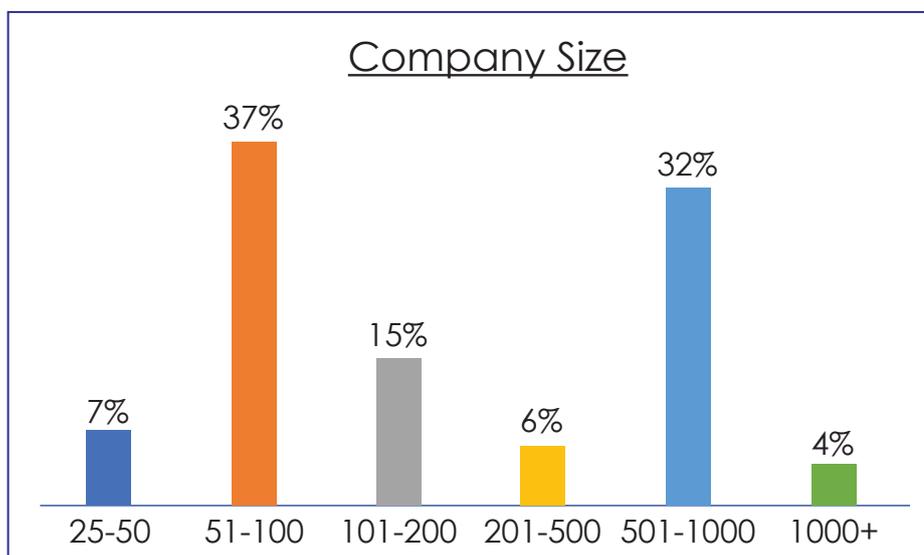
Almost a quarter (23%) of respondents fall under the category of IT manager, which encompasses roles of security management, infrastructure management, and mid-level IT decision making. This is followed by the 9% of respondents from human resources, and 8% of respondents who are chief information officers (CIOs) - the latter having a larger say in high-level IT decision making, compared to IT managers.

Role





Company Size

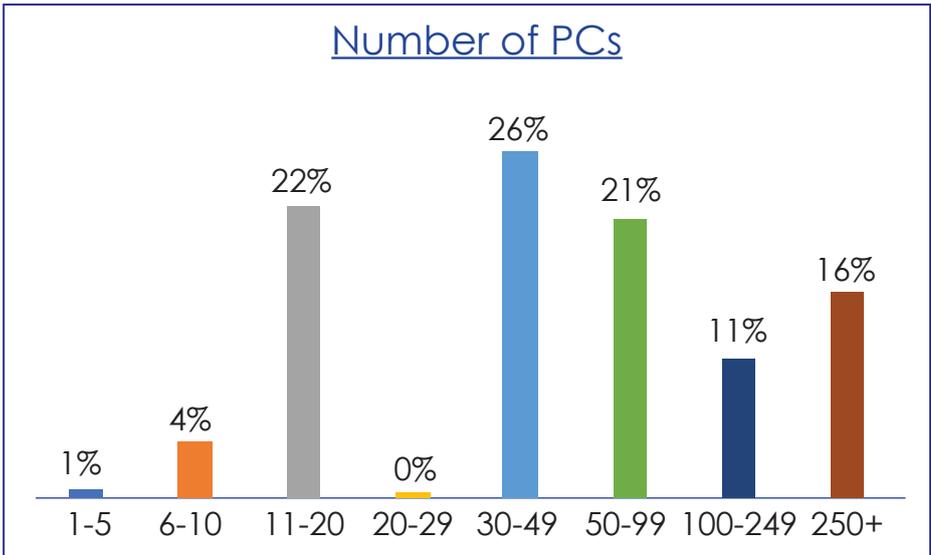


Company Size	Distribution
25 - 50	7,3%
51-100	36,5%
101 - 200	14,8%
201 - 500	5,8%
501 - 1000	31,8%
1000+	4%

Over a third (37%) of companies were 51-100 in size, defined on South Africa as medium-sized enterprises, while just over a third were 501-upward in size, defined as large corporations. This range allows for analysis across size bands.

Number of PCs





Number of PCs	Distribution
1-5	0,5%
6 - 10	4,3%
11 - 20	22%
20-29	0,3%
30 - 49	26%
50-99	21%
100 - 249	10,5%
250+	15,5%

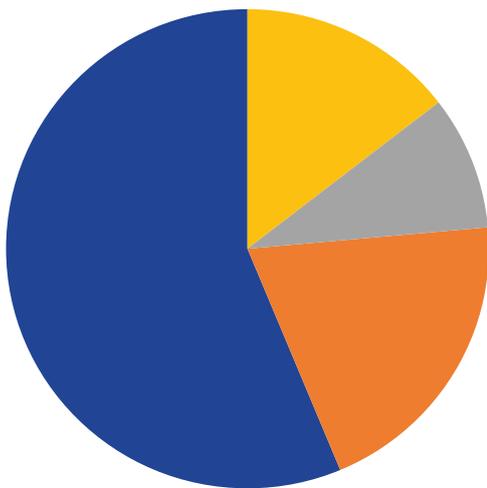
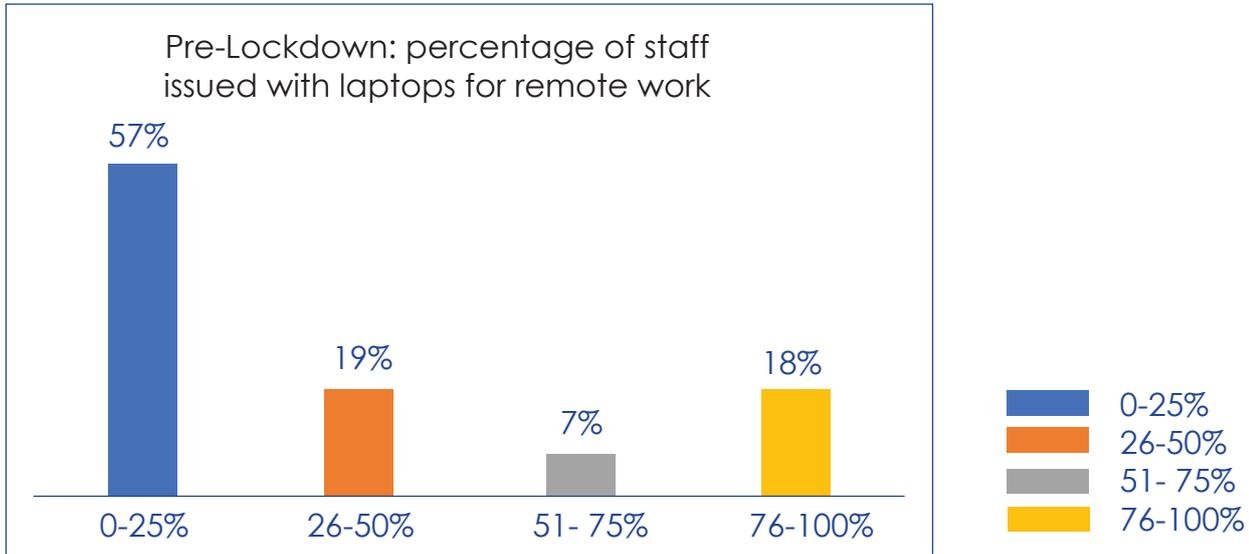
Respondents were asked how many computers were being used by their businesses. The graph shows a near bell-like curve across the size bands, rising again at the 250+ computer band, which represents large businesses that work in tech-intensive settings; where every employee requires a computer, such as in IT or financial services.



PR

Readiness
for remote work

Percentage of staff previously issued with laptops for remote work (prior to the COVID-19 crisis)

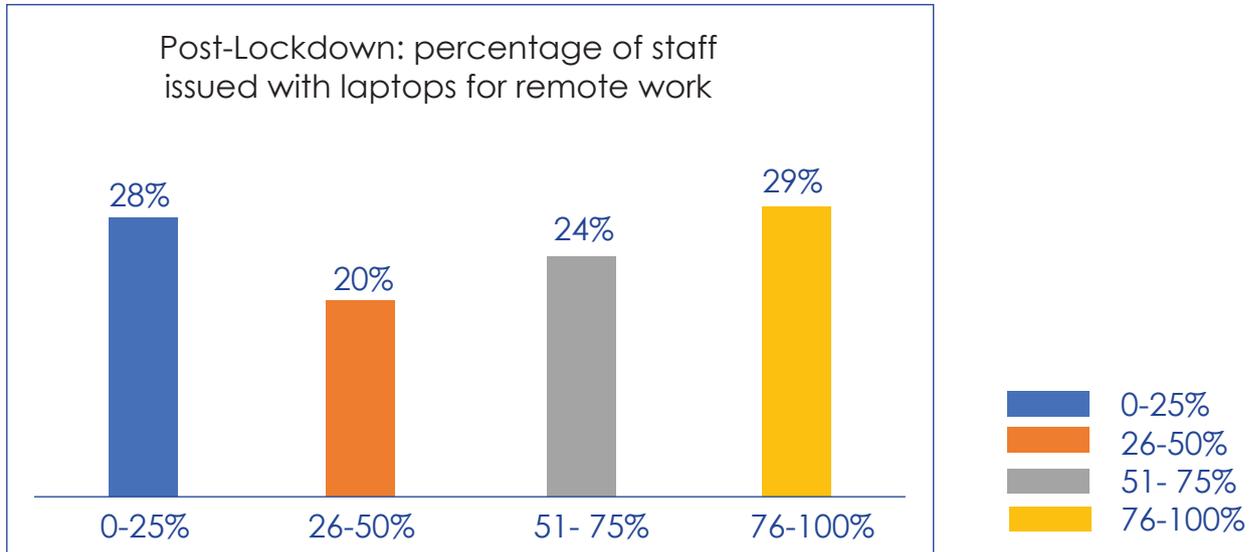


Pre-lockdown: Percentage of staff previously issued with laptops for remote work	Distribution
0-25%	56,5%
26-50%	18,5%
51-75%	7,3%
76-100%	17,8%

Before lockdown, 57% of respondents said that 0-25% of their staff were issued with laptops for remote work. On the opposite end, a mere 18% of respondents said that 76-100% of their staff were given laptops for remote work.

These numbers reveal that remote working was already an option for a significant number of companies, with almost one in five having equipped most of their staff for this mode of work. However, well over half of companies had not prepared for the eventuality.

Percentage of staff now issued with laptops for remote work (including those previously issued with laptops)

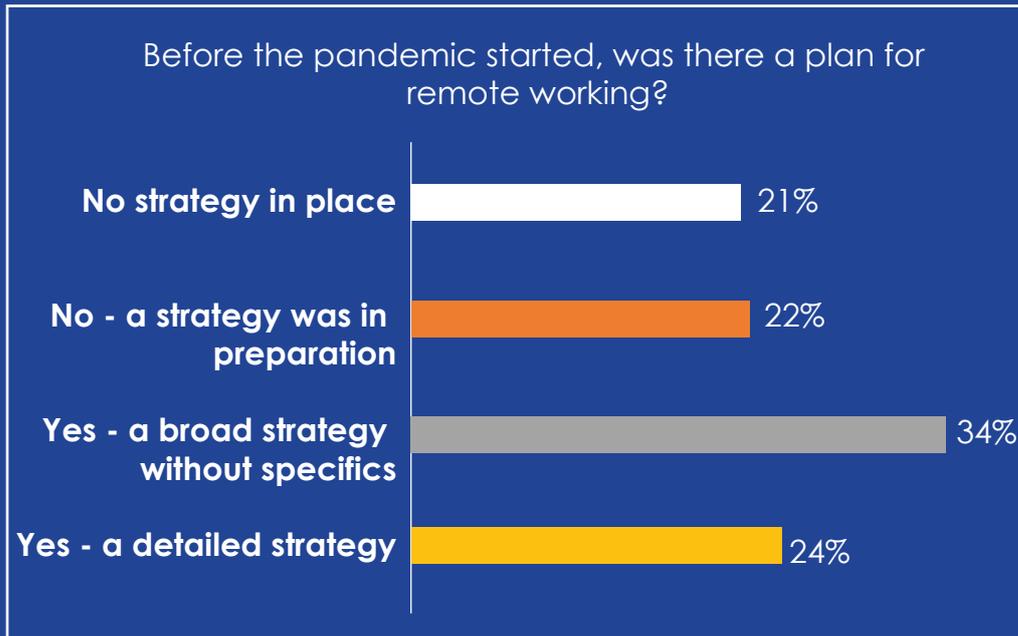


After lockdown, the distribution flattens out as more respondents report an increase in laptops for remote working during the lockdown. Compared to before lockdown, the 0-25% category decreased by 29%, and an average increase of 10% in the other groups.

In other words, only a little more than a quarter of companies were not able to move to remote working immediately, while close to a third of companies made the full transition and a further quarter of companies were able to enable between half and three-quarters of employees to work remotely. The total of these two categories represented more than half of companies, while the overall proportion of companies operating at this level increased by 28% of the total, and representing more than double the previous proportion.

Pre-lockdown: Percentage of staff previously issued with laptops for remote work	Distribution
0-25%	27,8%
26-50%	19,5%
51-75%	23,8%
76-100%	29%

Before the pandemic started, was there a formal strategy for remote working?



More than half of businesses were broadly prepared for remote working, with a quarter having a detailed strategy and a third a broad strategy, but without specifics. However, it should be noted that a strategy without specifics still meant companies would have been caught off-guard by the sheer scale of the impact of Covid-19 lockdowns. This means that only a quarter of companies - 23.5% - were truly ready for a quick transition.

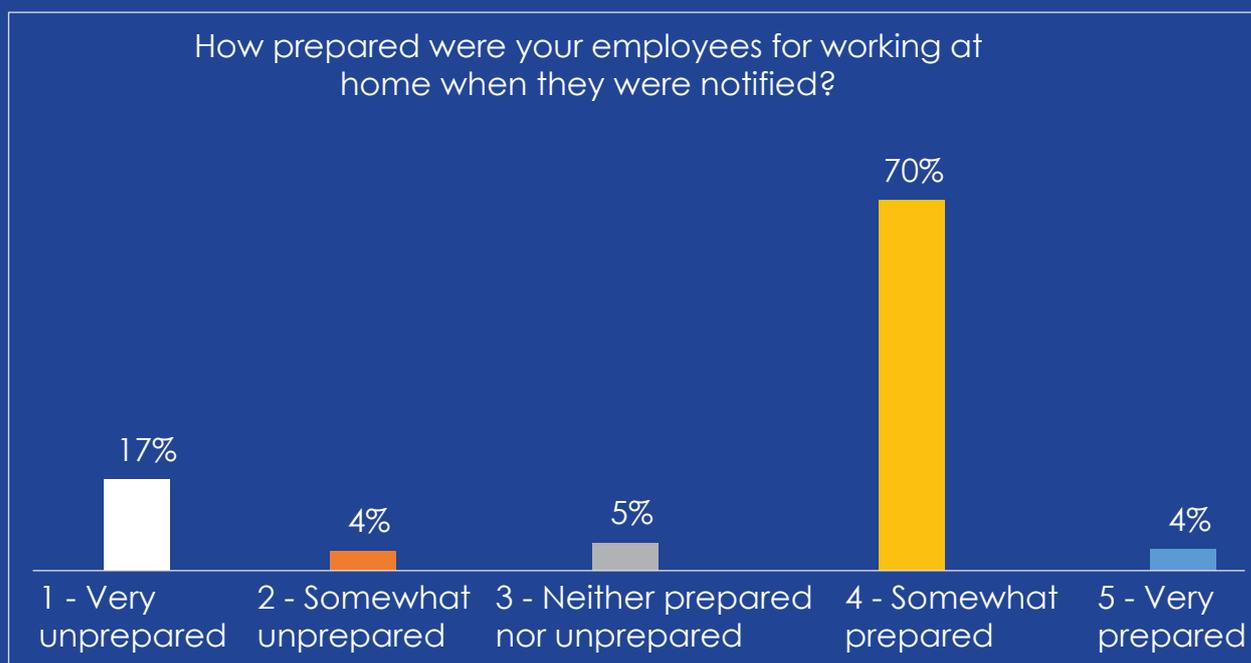
At the other end of the scale, a significant 42.5% did not have a strategy in place at all, as even those preparing a strategy would still have needed to formalise it.

This means that the vast majority of businesses - 76.5% - probably did not have enough time to prepare for remote working in the two days between the lockdown announcement and the start of the national shutdown.

However, even those who had a detailed strategy in place may not have been in the clear. Many may have had a remote working strategy in place to accommodate employees who don't usually work from one location, or for distributed office structures that allow employees to work from home. This in itself would not necessarily enable a quick transition for the full staff complement or for business operations.

Before the pandemic started was there a plan for remote working?	Distribution
No strategy in place	21%
No - a strategy was in preparation	21,5%
Yes - a broad strategy without specifics	34%
Yes - a detailed strategy	23,5%

On a scale from 1 to 5, how prepared were your employees for remote working when the COVID19 crisis began



Surprisingly, employees seemed more prepared for remote working than their employers, from the perspective of IT decision-makers. A large proportion (74%) of respondents said employees were somewhat prepared to work from home. Only 1 in 5, or 21%, were unprepared. The reason for such a high level of preparedness is likely to be related to employees being prepared for working from home because they had nowhere else to work.

On a scale from 1 to 5, how prepared were your employees for working at home when they were notified?	Distribution
1 - Very unprepared	17,3%
2 - Somewhat unprepared	3,8%
3 - Neither prepared nor unprepared	5,3%
4 - Somewhat prepared	69,8%
5 - Very prepared	4%

Which of the following have been success factors for your staff in remote working during the COVID-19 crisis?

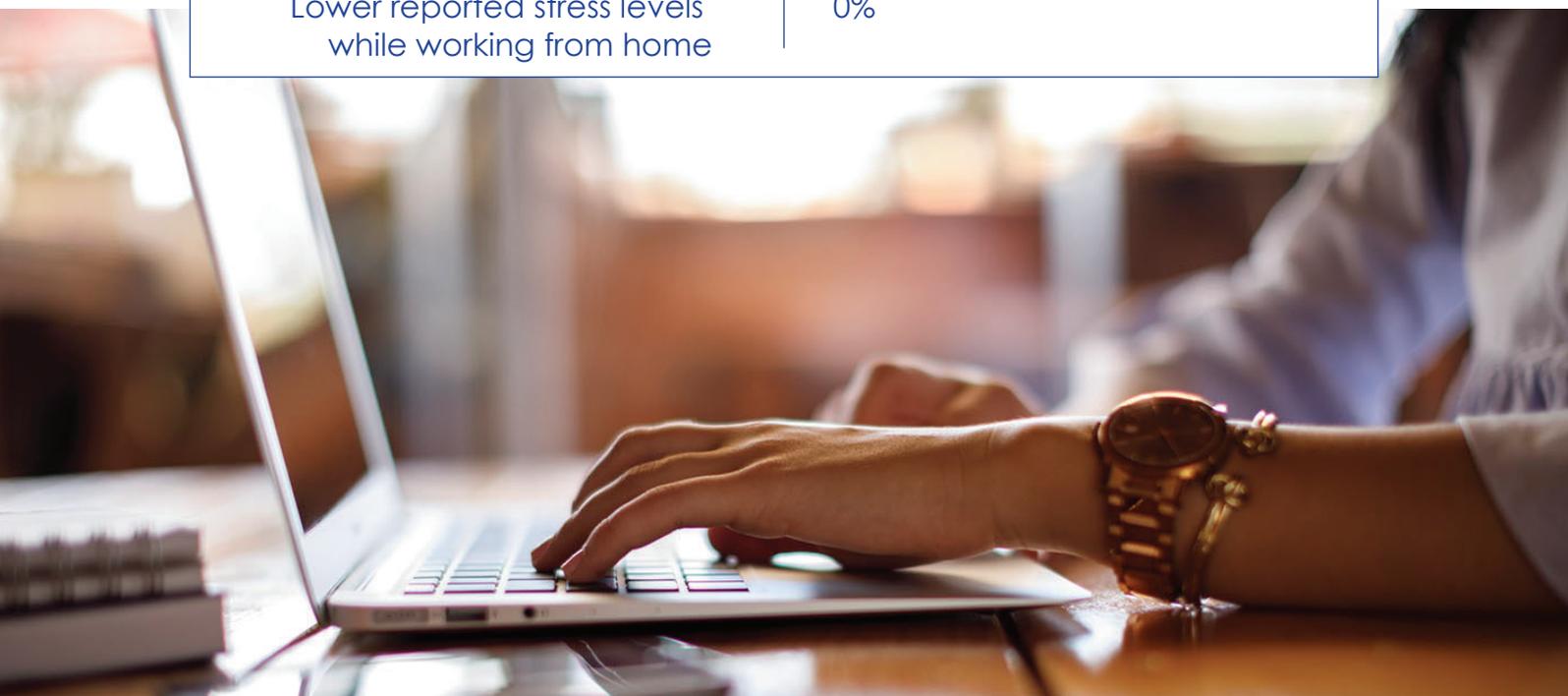
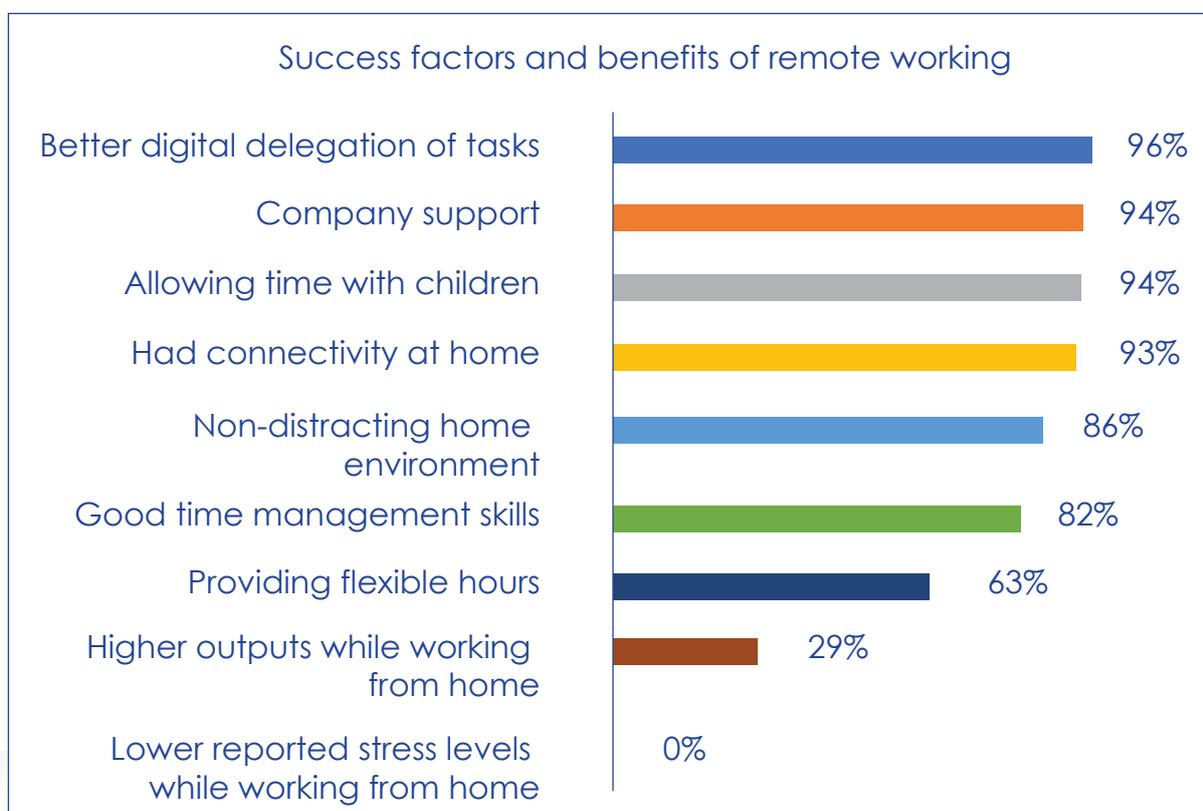
A set of success factors for remote working emerged strongly from the study, associated with a blend of key benefits and key strategies emerging from the new way of work. The first two were "supply side", as in business implementation, and the next two "demand side", as in home factors that facilitated the approach. The first two, better delegation of tasks and company support, emerge as being critical from a business strategy point of view, while the next two, the company allowing time with

children and having connectivity at home, were critical to a satisfying working environment at home. More than 9 out of 10 respondents cited these. A little more than 8 out of 10 cited the next two key factors, namely a non-distracting home environment and good time management skills - factors over which the company has little control.

Long-touted supposed benefits of remote working ranked far below these key factors. Fewer than two-thirds cited flexible working hours, suggesting that remote working still has to fit in with regular business hours. The proportion was not low in its own right but, in contrast to the main success factors, was significantly lower.

Higher output while working on home was cited by dramatically fewer, with less than a third viewing it as a success factor. This indicates that the historically most commonly cited benefit of remote working, prior to the Covid-19 crisis, does not play a significant role in success factors.

Not a single respondent believed that stress levels being lower as a result of working from home was a success factor. Hand-in-hand with productivity not being boosted, it suggests the experience of working from home remains problematic.

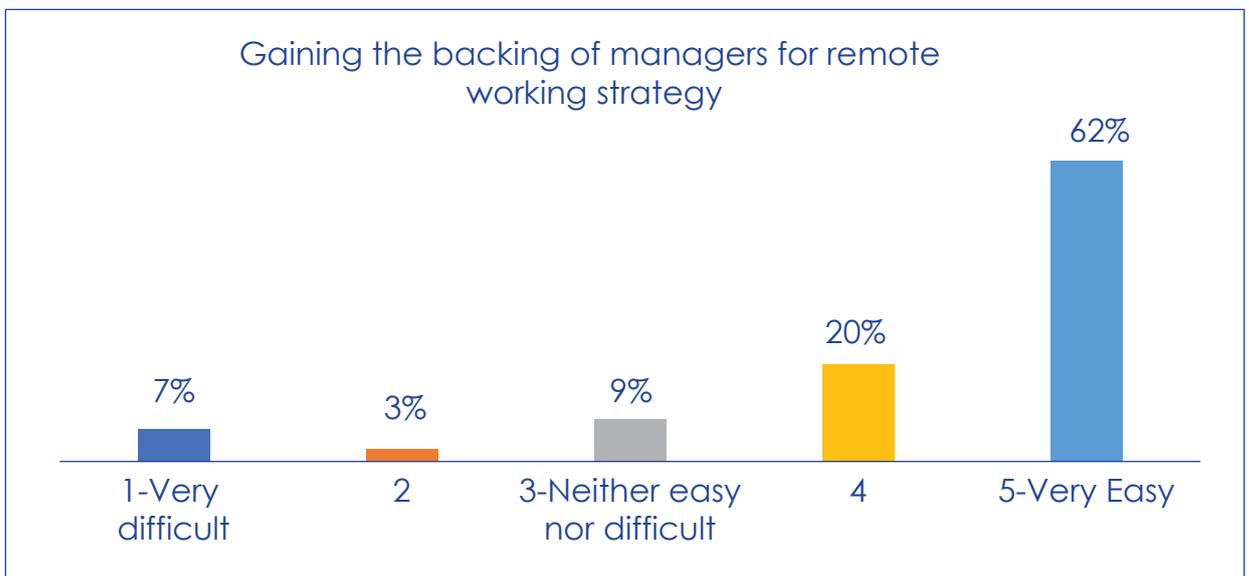


Success factors for your staff in remote working	Response
Better digital delegation of tasks	95,8%
Company support	94%
Allowing time with children	93,5%
Had connectivity at home	92,5%
Non-distracting home environment	86%
Good time management skills	81,5%
Providing flexible hours	63,3%
Higher outputs while working from home	28,8%
Lower reported stress levels while working from home	0%

On a scale from 1 to 5, how difficult were the following?

Respondents were asked about how difficult or easy it was to perform the following in preparation for lockdown and remote working.

Gaining the backing of managers for remote working strategy



More than 80% of respondents found it easy to gain the backing of managers for their remote working strategy, with three quarters of these in turn finding it very easy (62% of the total sample). Only one in ten found it difficult. This is clearly a result of managers understanding that they had to do whatever necessary to enable staff to work remotely during lockdown. This was a powerful example of middle management understanding what was required of them.

Training for employees to work remotely

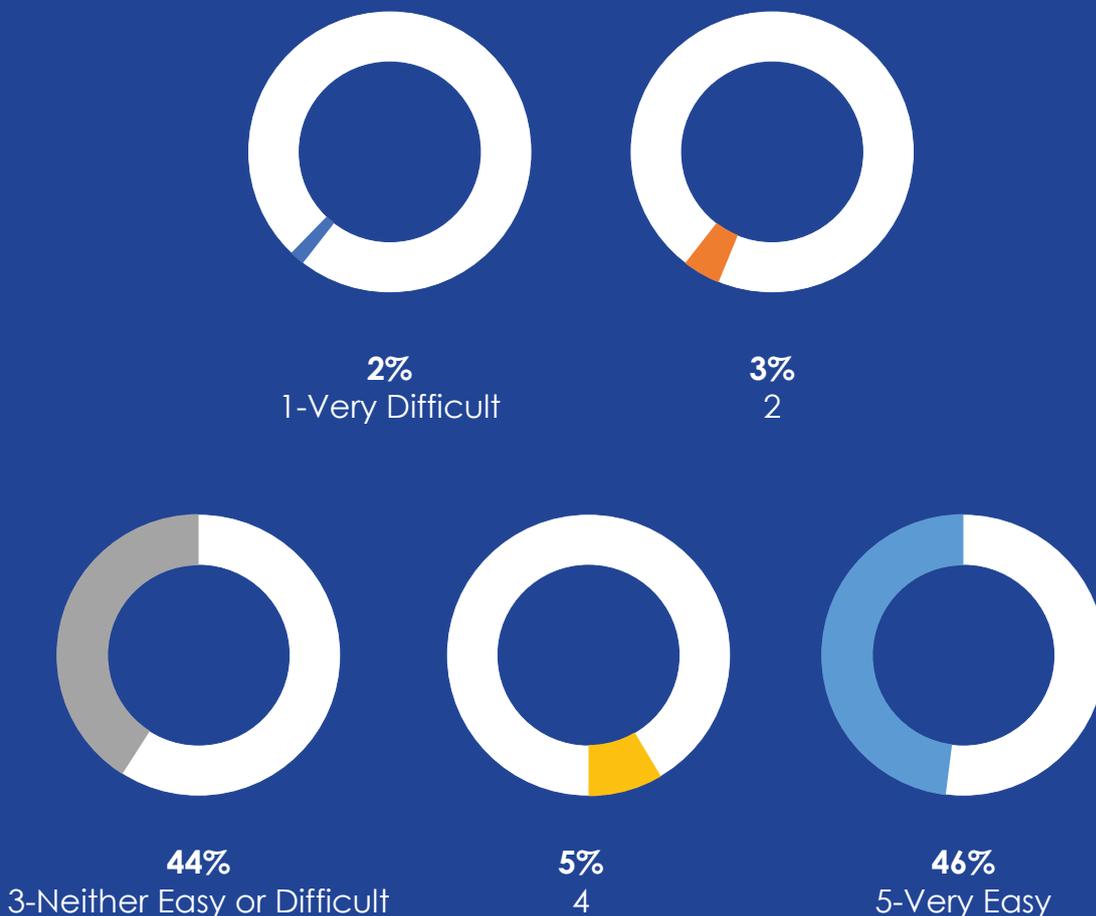
The ease of training employees fell somewhat, but the same proportion as those who found management buy-in very easy also found it very easy to train employees to work remotely. However, a third of respondents were neutral or ambivalent on this question. This is an indication of the high proportion of businesses that had not exposed their employees to the possibility of working remotely, and were either working on strategies in this regard, or did not have strategies..



Making strategy easy to understand

The complexity of rolling out a remote working strategy is underlined by the finding that there is an almost even split between those who find creating understanding of the strategy easy and those who don't. This may again illustrate the divide between those who have been moving to remote working and those who had not started on that journey.

Making strategy easy to understand

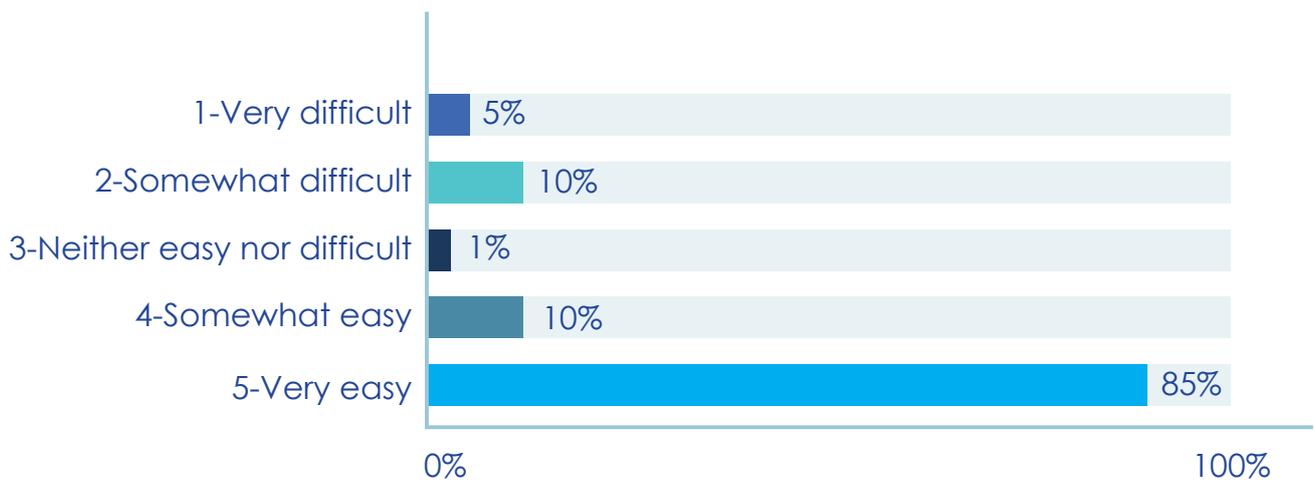


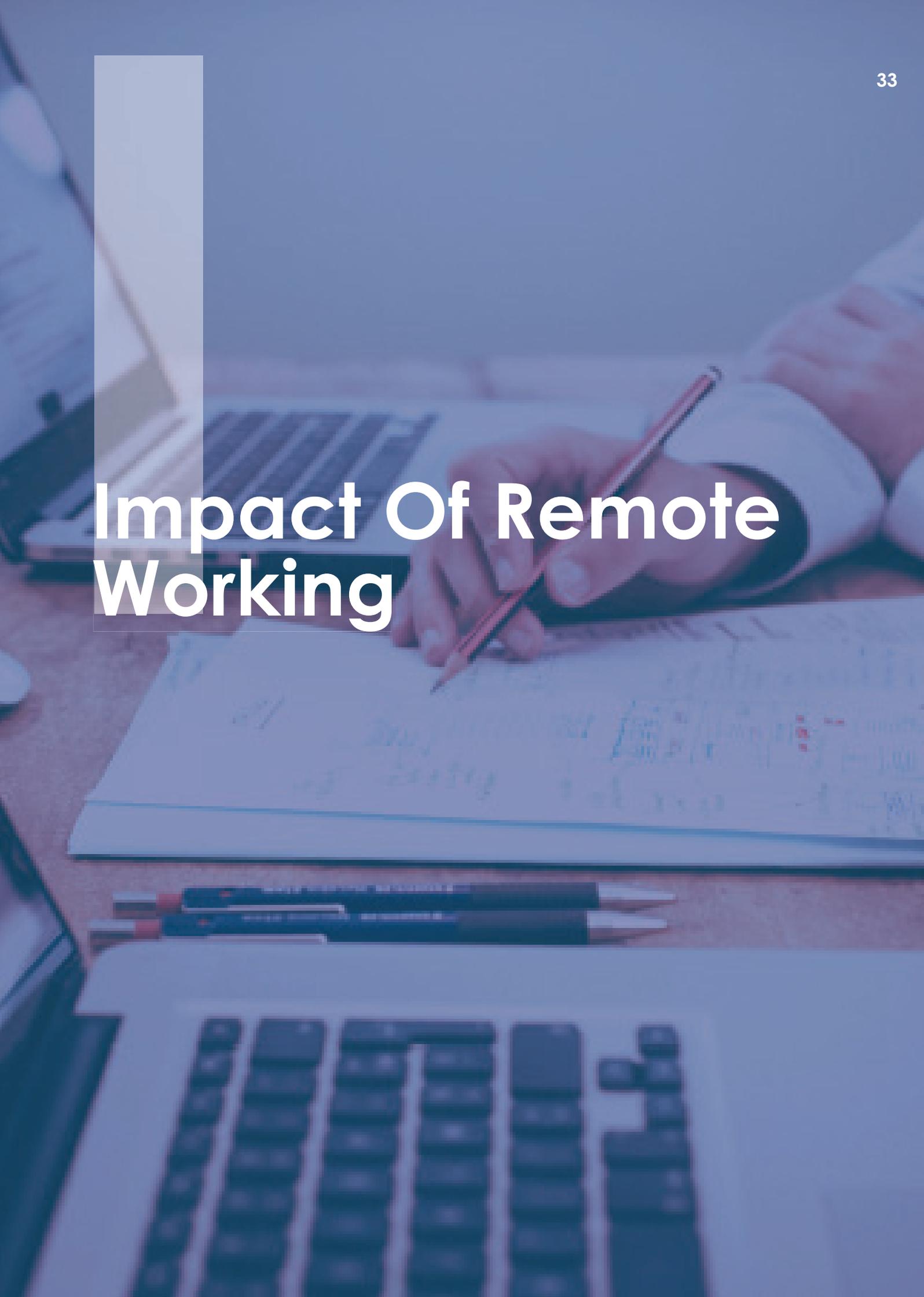
Ensuring employees had access to work equipment at home

Although strategy and training were varied, ensuring employees had access to work equipment at home was almost unanimously easy, with 85% of respondents not having an issue ensuring employees had access to work equipment at home. This may have been in the form of laptops or tablets, but may also have been as simple as an instruction to take a desktop computer home before the lockdown commenced. It is clear that, where it is only a matter of equipping staff, complexity falls away.

Difficulty scale from 1 to 5	Gaining the backing of managers for remote working strategy	Training for employees to work remotely	Making strategy easy to understand	Ensuring employees had access to work equipment at home
1 – Very difficult	6,8%	0,3%	1,5%	3,5%
2 – Somewhat difficult	2,5%	1,5%	3%	9,5%
3 - Neither easy or difficult	8,8%	30,5%	44,1%	1%
4 – Somewhat easy	20%	6,3%	5%	1%
5 – Very easy	62%	61,5%	46,4%	85%

Ensuring employees had access to work equipment at home



A person is writing in a notebook with a pen. The notebook is open, and the person's hand is visible holding the pen. In the foreground, a laptop keyboard is visible. The background is slightly blurred, showing more of the desk and the person's arm. The overall scene is dimly lit, with a blue tint.

Impact Of Remote Working

Which of these practices are your staff adopting?

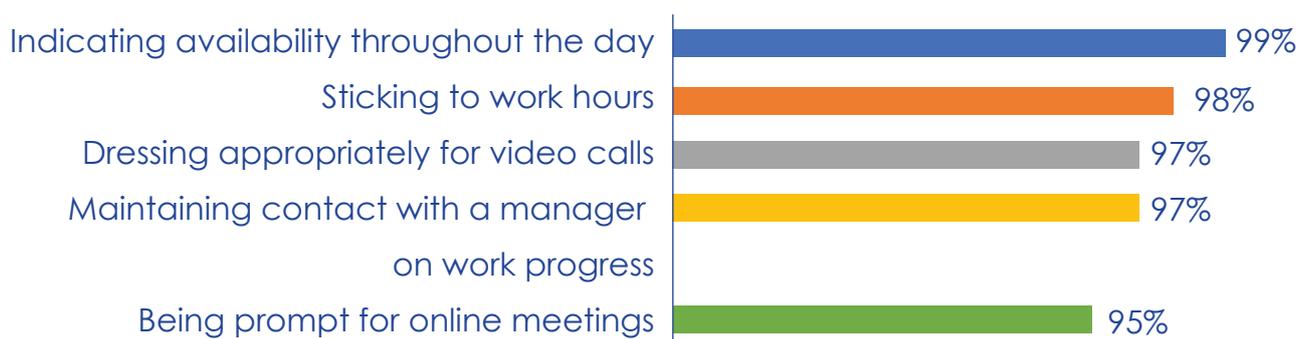
Respondents were asked about the practices of their employees and how they have adopted these practices. Overall, respondents have shown that best practices for work are generally being adhered to.

Almost every respondent said their employees were sticking to work hours (at 98%) and indicating availability throughout the day (at 99%), which most likely mimics pre-lockdown work hours and times of remote unavailability are likely the same as in-office unavailability.

This is followed by 97% of respondents saying their employees dress appropriately for video calls and maintain contact with a manager about work progress.

While the proportion is not small by any measure, being prompt for online meetings was ranked last (at 95%). This may show the technology gap in connectivity and/or training.

Which of these practices are your staff adopting?

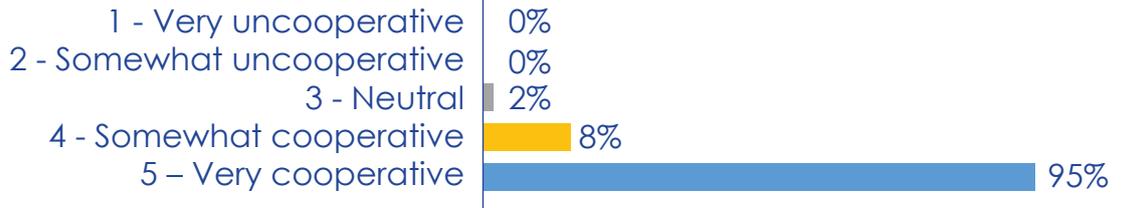


Which of these practices are your staff adopting	Response
Indicating availability throughout the day	98,5%
Sticking to work hours	97,8%
Dressing appropriately for video calls	97%
Maintaining contact with a manager on work progress	97%
Being prompt for online meetings	94,5%

How cooperative are your employees about working from home?

When asked about the level of employee cooperation, 91% of decision-makers reported their employees were very cooperative when working from home. A further 99% of employees were overall cooperative when working from home. This indicates a vast majority of employees are ready to work from home.

How cooperative are your employees about working from home?

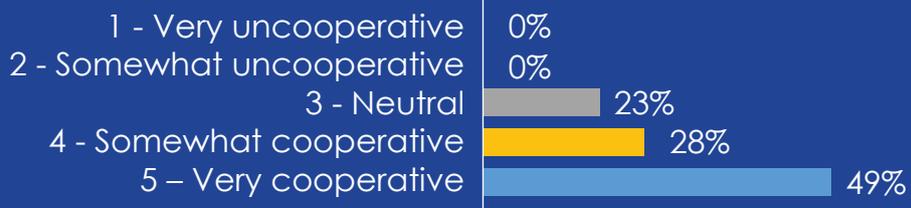


On a scale from 1 to 5, how cooperative are your employees about working from home?	Distribution
1 - Very uncooperative	0%
2 - Somewhat uncooperative	0%
3 - Neutral	1,5%
4 - Somewhat cooperative	8%
5 - Very cooperative	90,5%

How has your data security strategy had to shift for remote working?

When asked about how data security strategy has changed, virtually no respondents said there was no shift or a very mild shift. It picks up with a mild shift, at 23%, and steadily increased to just under half (49%) of respondent reporting there had to be a heavy shift in data security strategy to accommodate remote working.

How has your data security strategy had to shift for remote working?



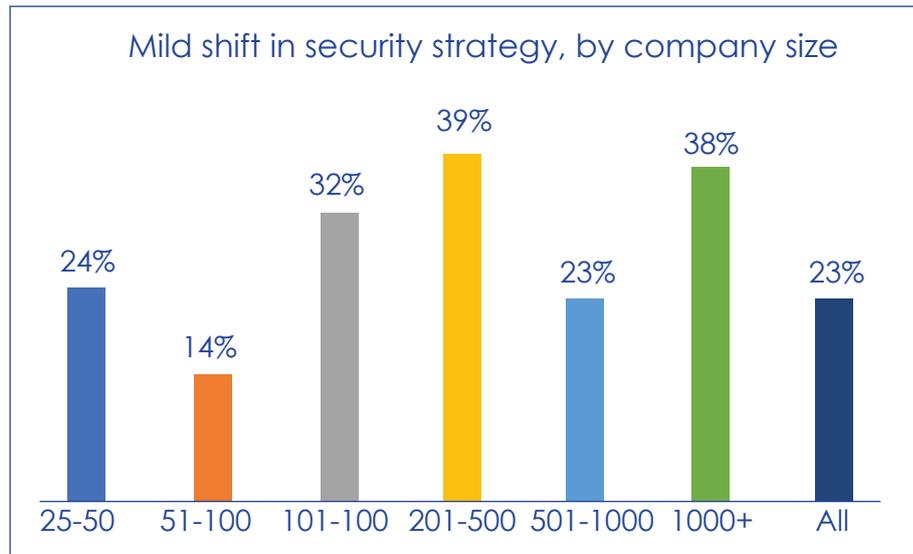
On a scale from 1 to 5, how has your data security strategy had to shift for remote working?	Distribution
1 - No Shift	0,1%
2 - Very mild shift	0,2%
3 - Mild Shift	22,5%
4 - Somewhat heavy shift	28%
5 - Heavy Shift	49,3%





Shift in security strategy, by company size

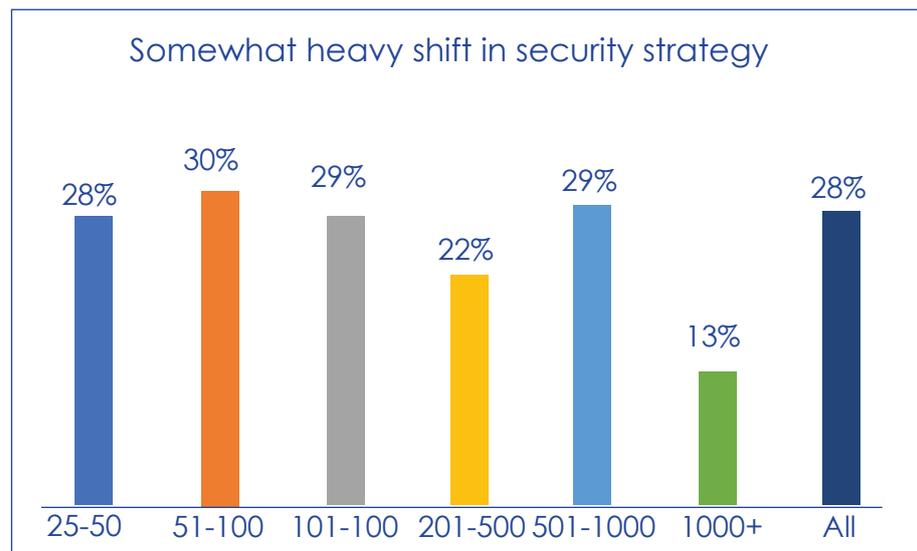
Mild shift in security strategy, by company size



The very large (1000+) and medium-to-large sized businesses (201-500) were most likely to report having a mild shift in data security. This may be indicative of a good remote strategy that focused on data security from before the lockdown was put into place.

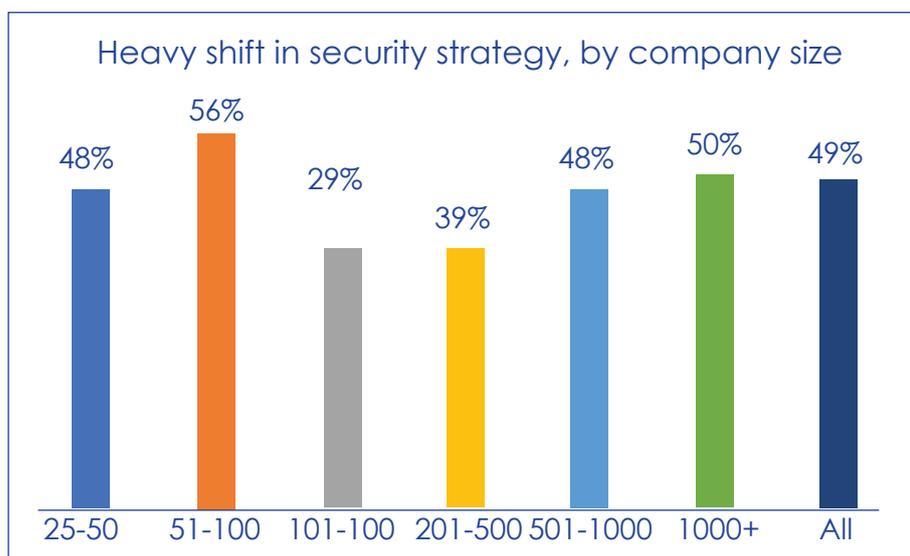
Somewhat heavy shift in security strategy

While the likelihood remains close to the overall proportion for most company size bands, the 1000+ company size band was least likely to report a somewhat heavy shift in data security strategy.



Heavy shift in security strategy, by company size

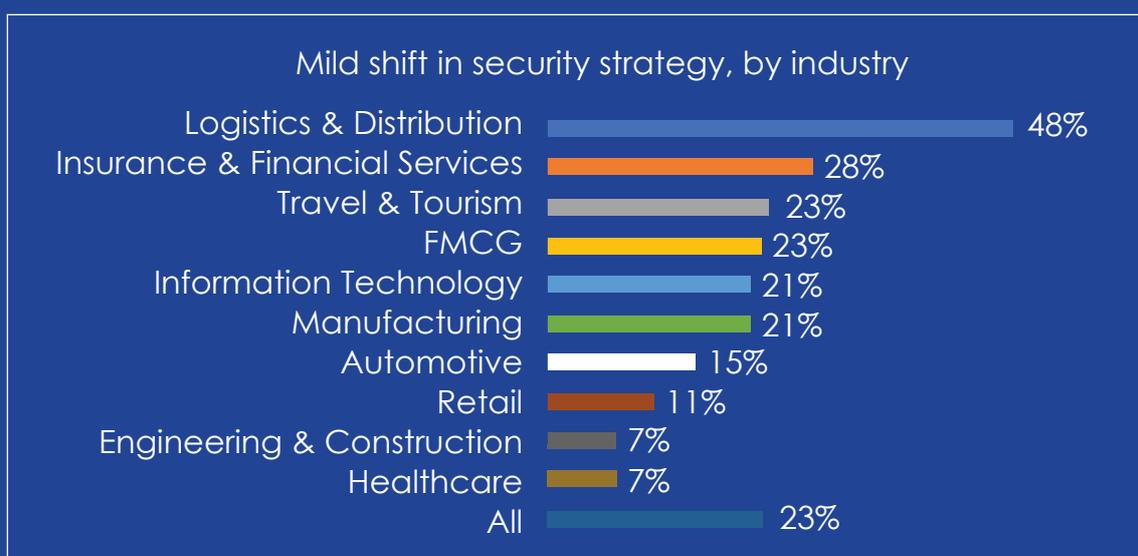
While the largest proportion of respondents reported their data security strategy experienced a heavy shift, medium (101-200) to medium-to-large (201-500) sized businesses were least likely to report on this heavy shift.



Data security shift	3 - Mild Shift	4 - Somewhat heavy shift	5 - Heavy Shift
25 - 50	24%	28%	48%
51-100	14%	30%	56%
101 - 200	32%	29%	39%
201 - 500	39%	22%	39%
501 - 1000	23%	29%	48%
1000+	38%	13%	50%
All	23%	28%	49%

Shift in security strategy, by Industry

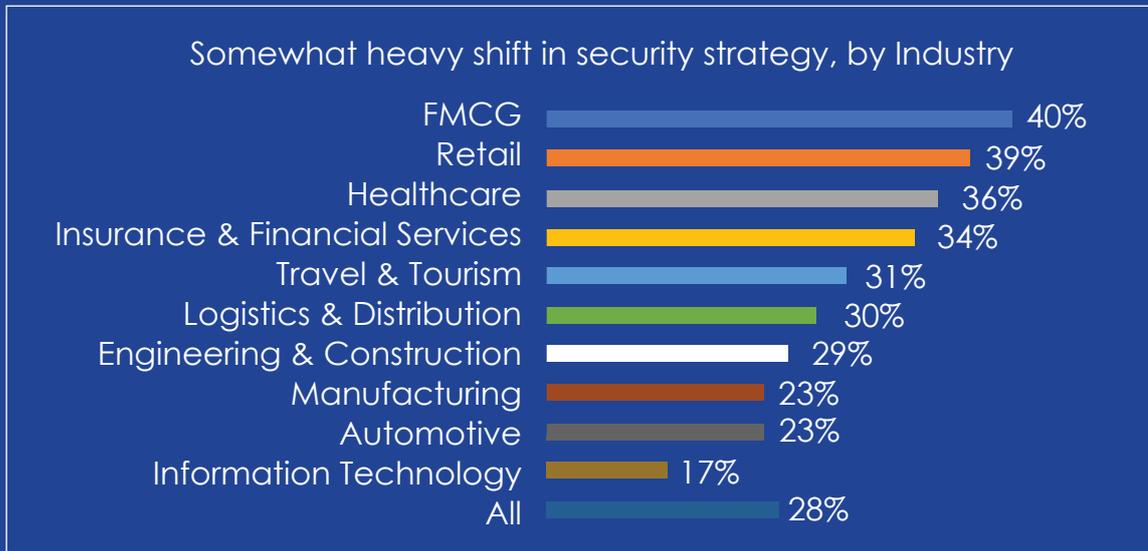
Mild shift in security strategy, by industry



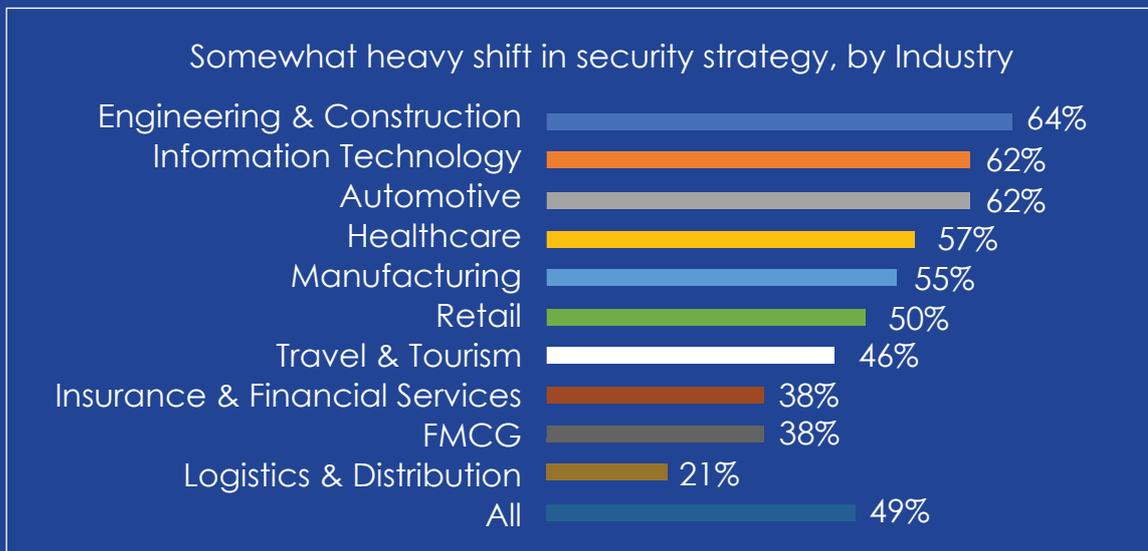
When selecting those who reported a mild shift in data security strategy by industry, almost half of the logistics and distribution respondent base reported a mild shift. This may be due to existing security strategies being effective, and due to the nature of logistics being mostly remote.

39 Somewhat heavy shift in security strategy, by Industry

40% of FMCG, 39% of retail, and 36% of healthcare industries reported a somewhat heavy shift in data security strategy. This shows these industries have had shift their strategies in response to lockdown conditions, while still perceiving cybersecurity to be a threat about remote work.



Heavy shift in security strategy, by industry



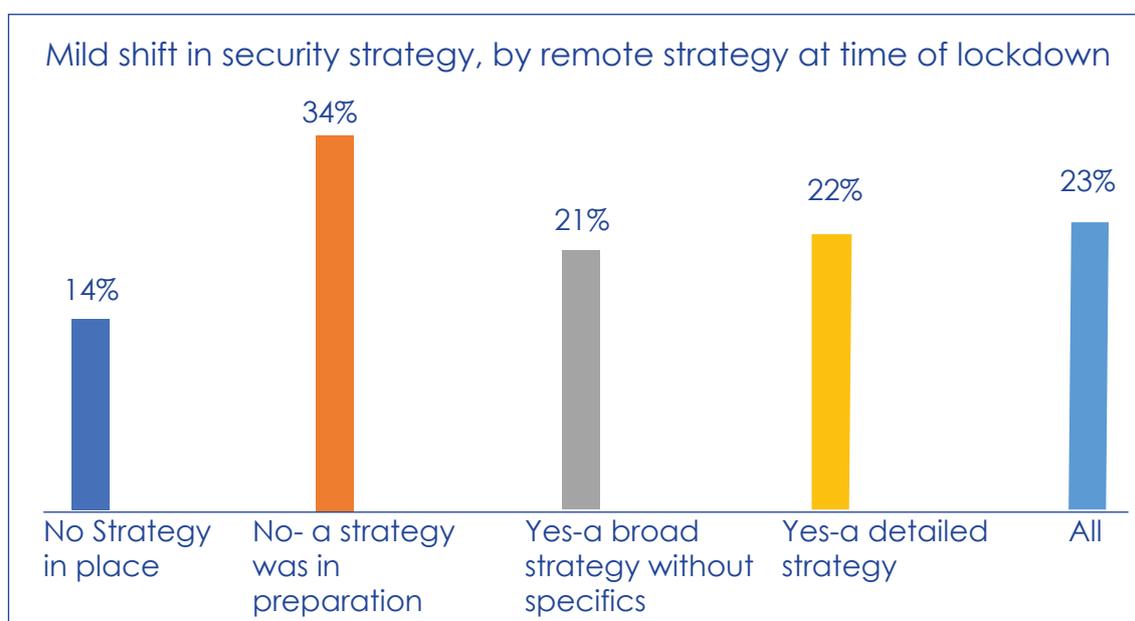
The largest shift in data security strategy was in the engineering & construction, information technology and automotive sectors, at 64%, 62%, and 62% respectively.

This may show one of two factors at play: either a poor data security strategy has had to involve to a new one, or the nature of these businesses is having a security strategy that shifts heavily consistently.

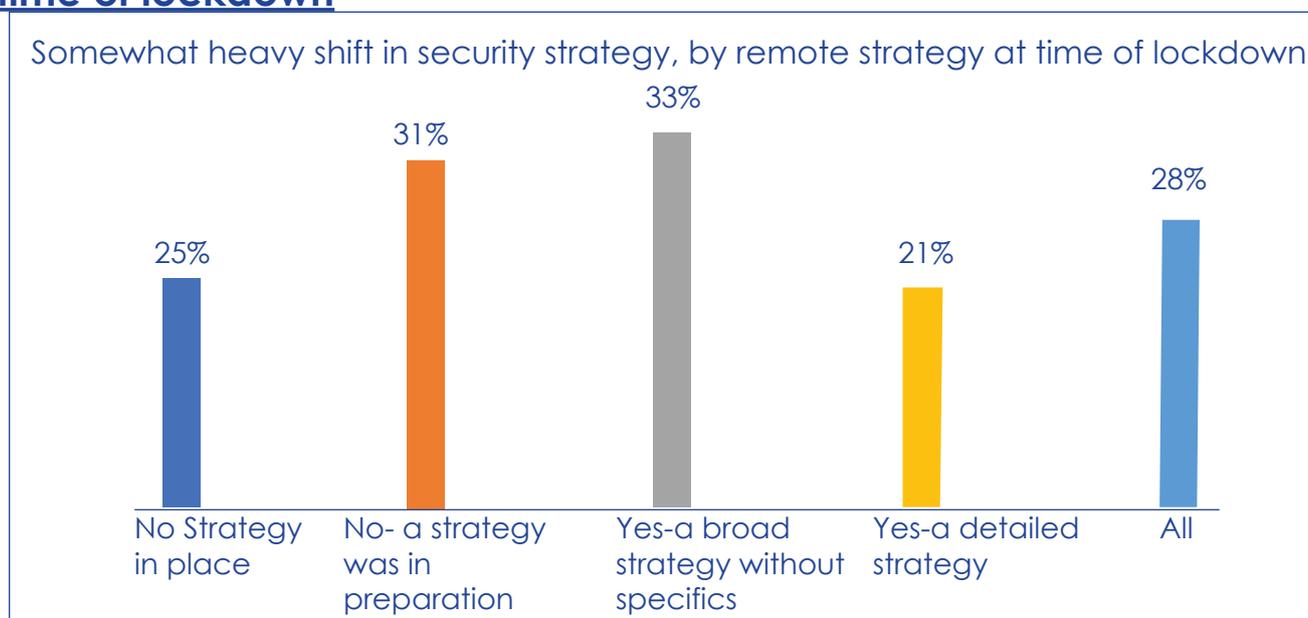
Data security strategy	Mild Shift	Somewhat heavy shift	Heavy Shift
Information Technology	21%	17%	62%
Insurance & Financial Services	28%	34%	38%
Manufacturing	21%	23%	55%
FMCG	23%	40%	38%
Logistics & Distribution	48%	30%	21%
Engineering & Construction	7%	29%	64%
Retail	11%	39%	50%
Healthcare	7%	36%	57%
Automotive	15%	23%	62%
Travel & Tourism	23%	31%	46%
All	23%	28%	49%

Shift in security strategy, by formal strategy for remote work before lockdown

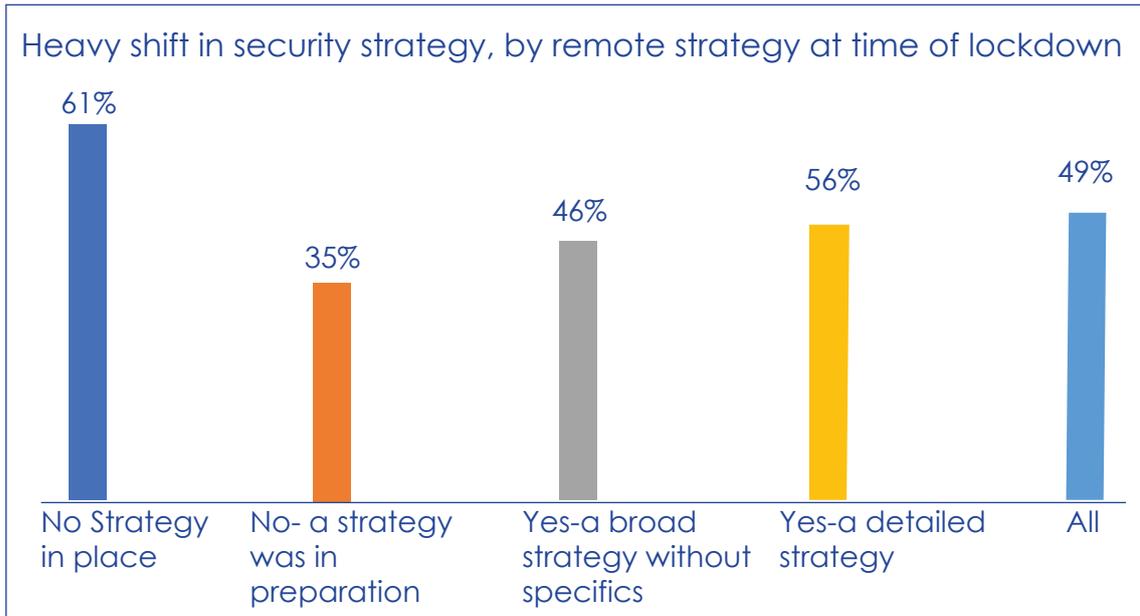
Mild shift in security strategy, by remote strategy at time of lockdown



Somewhat heavy shift in security strategy, by remote strategy at time of lockdown



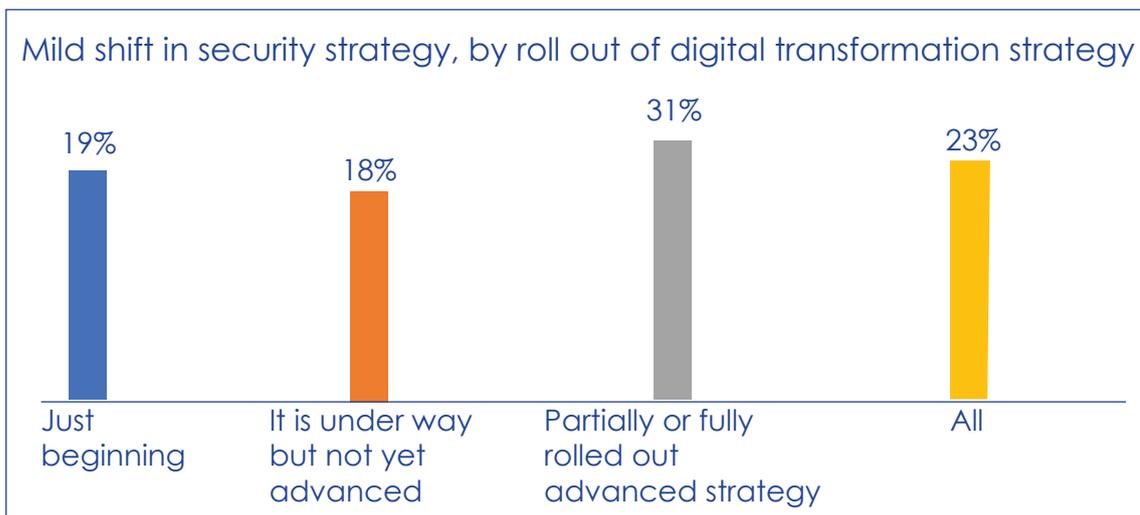
Heavy shift in security strategy, by remote strategy at time of lockdown



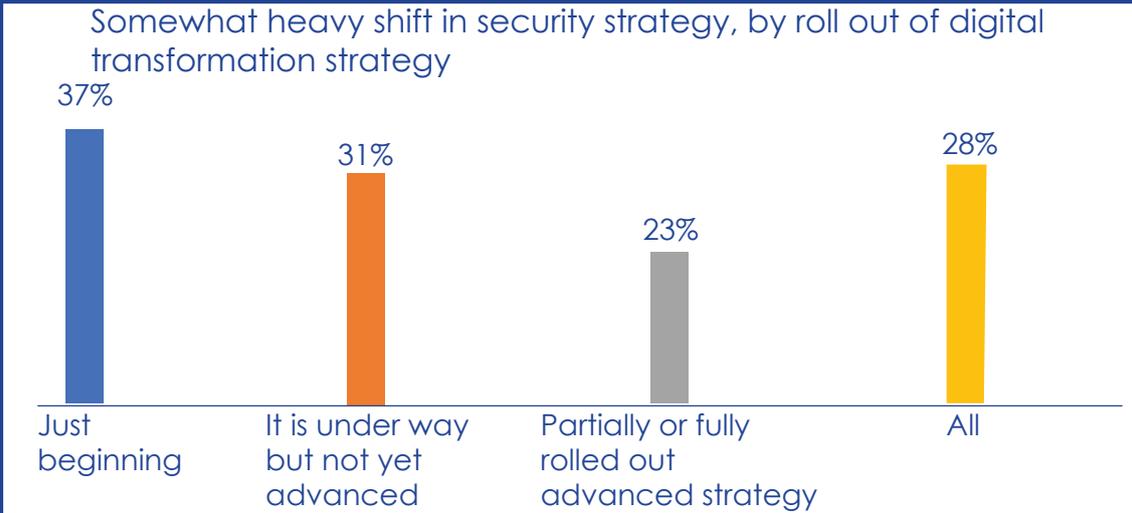
Data security shift	Mild Shift	Somewhat heavy shift	Heavy Shift
No strategy in place	14%	25%	61%
No - a strategy was in preparation	34%	31%	35%
Yes - a broad strategy without specifics	21%	33%	46%
Yes - a detailed strategy	22%	21%	56%
All	23%	28%	49%

Shift in security strategy, by roll out of digital transformation strategy

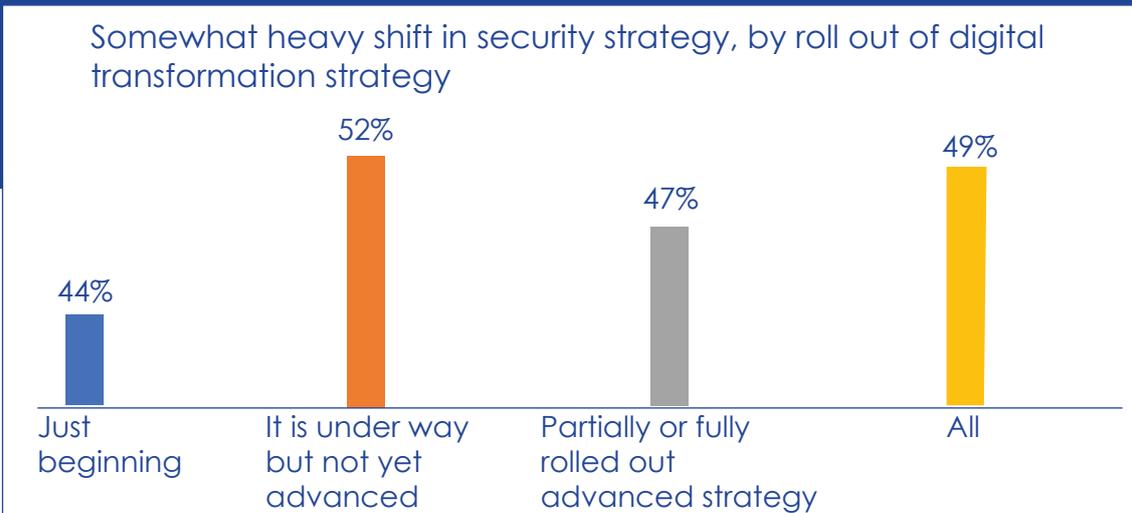
Mild shift in security strategy, by roll out of digital transformation strategy



Somewhat heavy shift in security strategy, by roll out of digital transformation strategy

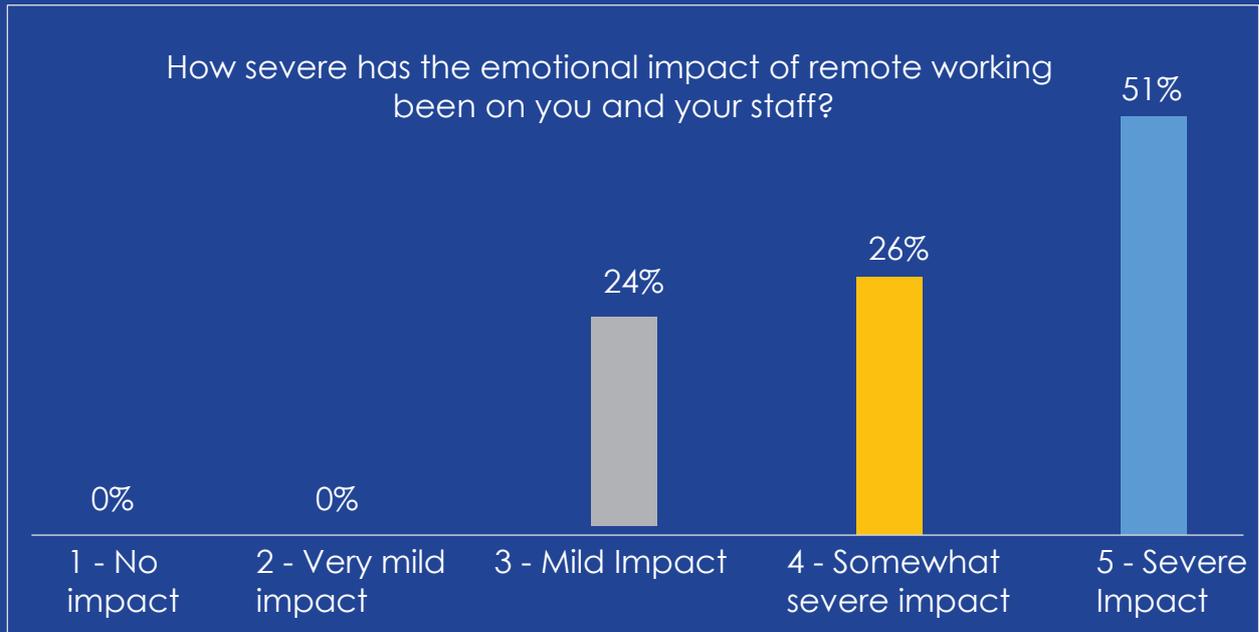


Heavy shift in security strategy, by roll out of digital transformation strategy



Remote work strategy shift	Mild Shift	Somewhat heavy shift	Heavy Shift
Just beginning	19%	37%	44%
It is under way but not yet advanced	18%	31%	52%
Partially or fully rolled out advanced strategy	31%	23%	47%
All	23%	28%	49%

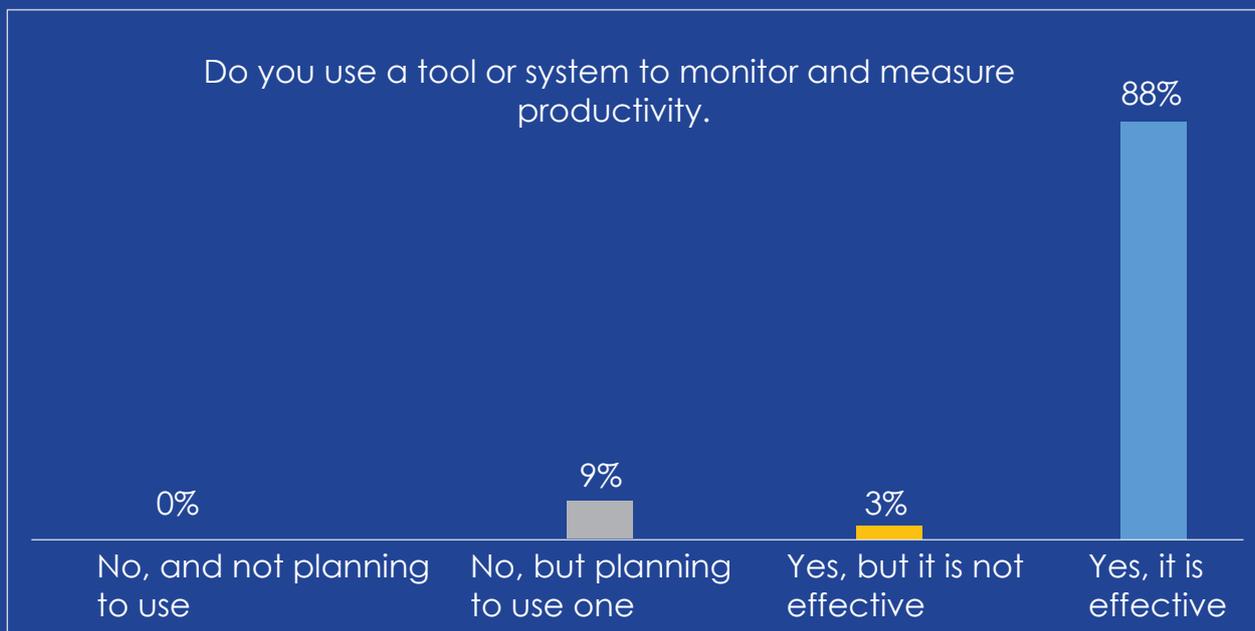
How severe has the emotional impact of remote working been on you and your staff?



Over half (51%) of respondents report the emotional impact of working from home has been severe for staff, as well as managers. This is typical for any severe change in working arrangements.

On a scale from 1 to 5, how severe has the emotional impact of remote working been on you and your staff	Distribution
1 - No impact	0%
2 - Very mild impact	0%
3 - Mild impact	23,5%
4 - Somewhat severe impact	25,8%
5 - Severe Impact	50,8%

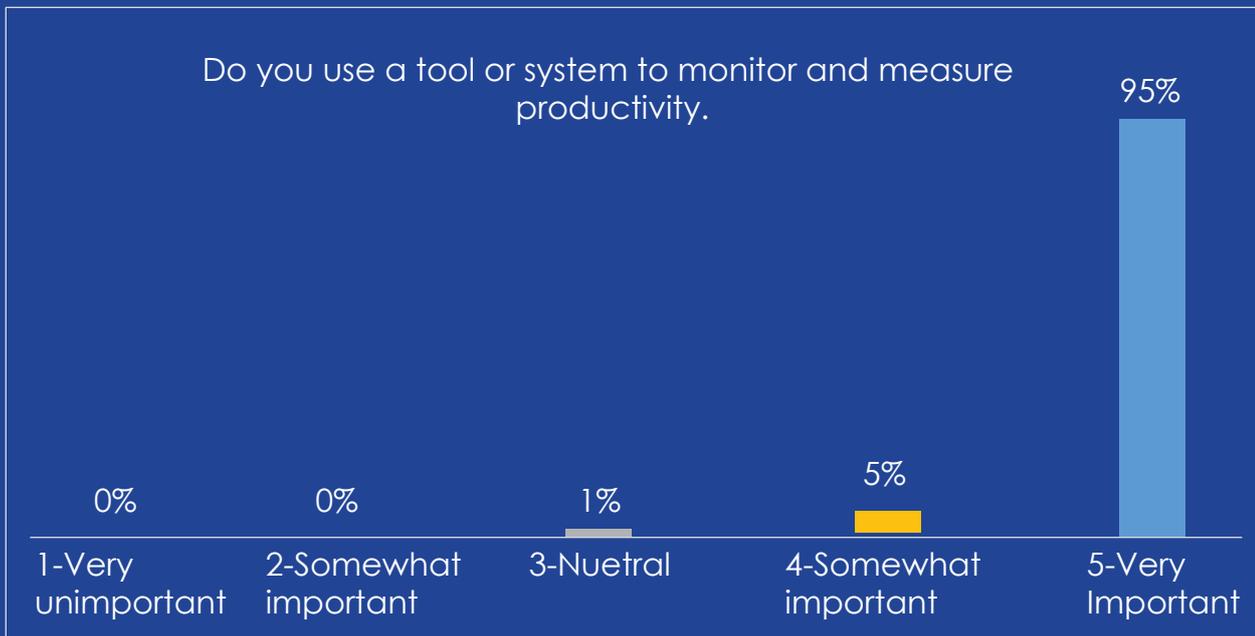
Do you use a tool or system to monitor and measure productivity?



Do you use a tool or system to monitor and measure productivity?	Distribution
No, and not planning to use	0,3%
No, but planning to use one	9,1%
Yes, but it is not effective	2,5%
Yes, it is effective	88,2%

Digital transformation

How important do you believe digital transformation is?

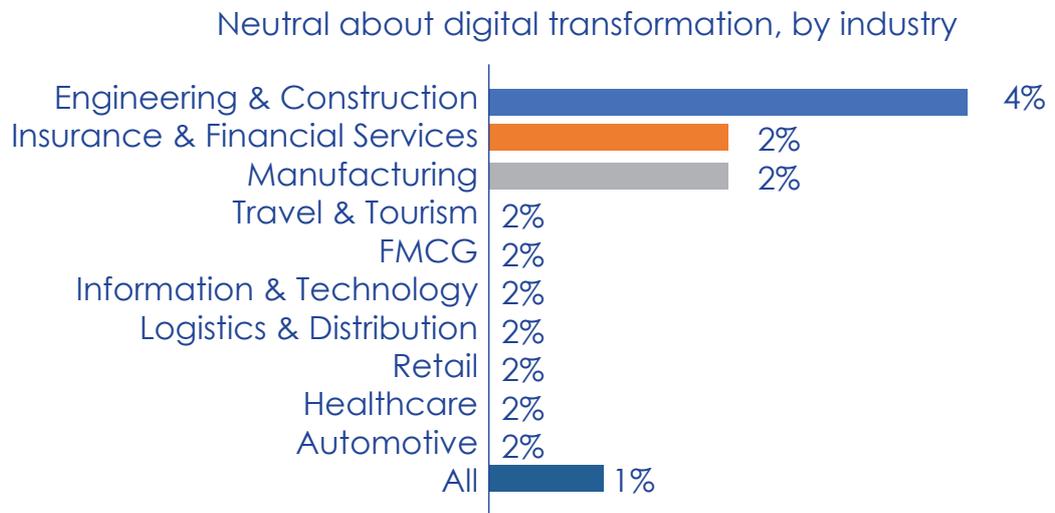


Respondents were given the following definition of digital transformation: use of digital technology to streamline business processes. From this definition, a large majority (95%) of respondents were asked how important they believed digital transformation was. This shows how vital business owners find digital transformation to be.

How important do you believe digital transformation is	Distribution
1 - Very unimportant	0%
2 - Somewhat unimportant	0%
3 - Neutral	0,8%
4 – Somewhat important	4,8%
5 - Very important	94,5%

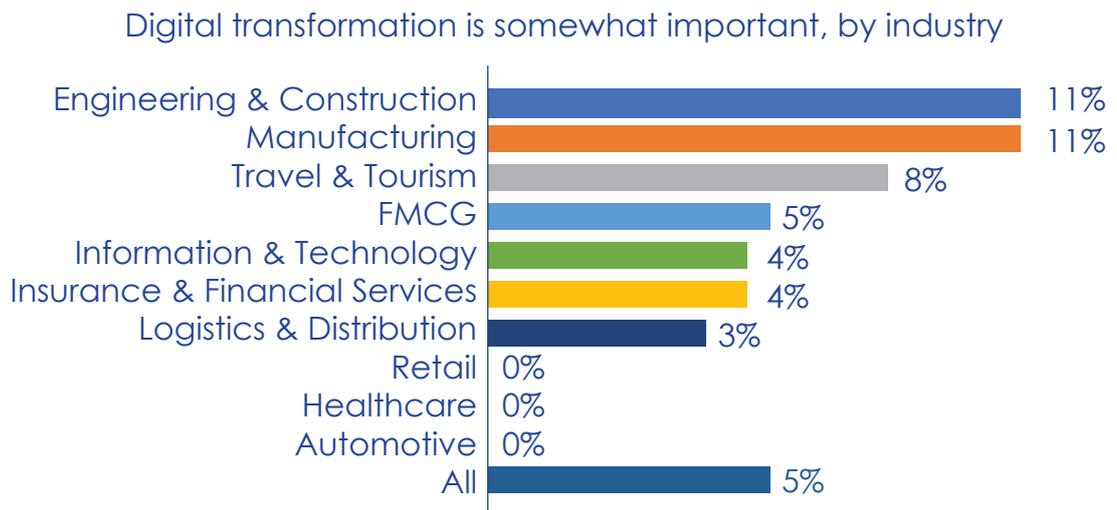
Digital transformation's level of importance, by Industry

Neutral about digital transformation, by industry



Overall, there were very few companies who cited digital transformation as neutral in importance, at 1%. Of this small proportion, the top industries barely made part of this 1%, with only 4% of engineering and construction companies citing neutral importance.

Digital transformation is somewhat important, by industry

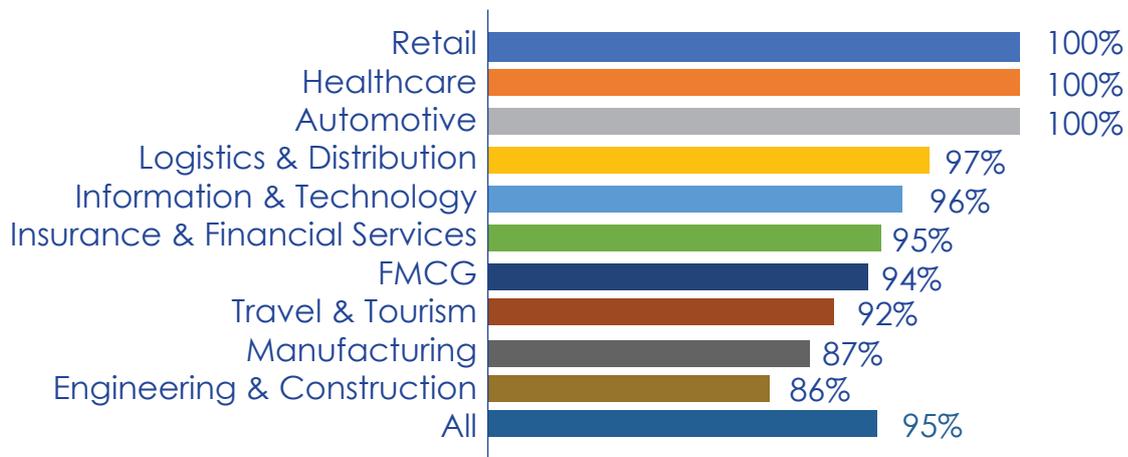


As with neutral importance, a small 5% of businesses cites digital transformation as somewhat important. For this reason, further analysis will be restricted to those who cited very important.

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Digital transformation is somewhat important, by industry

Digital transformation is somewhat important, by industry

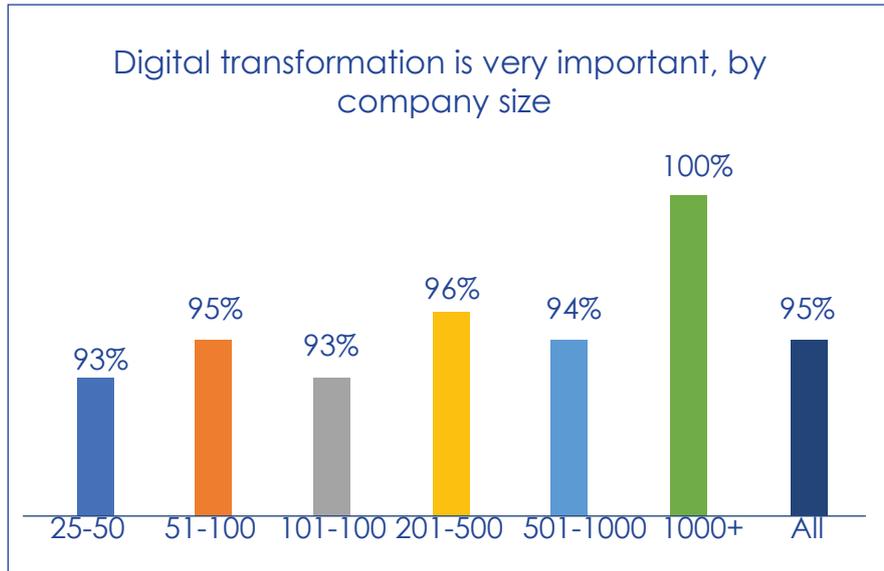


Of those who responded very important to the importance of digital transformation, three sectors were unanimous in its importance, namely retail, healthcare, and automotive (at 100%).

	Neutral	Somewhat important	Very important
Information & Technology	0,00%	4,26%	95,74%
Insurance & Financial Services	2,13%	4,26%	93,62%
Manufacturing	2,13%	10,64%	87,23%
FMCG	0,00%	5,00%	95,00%
Logistics & Distribution	0,00%	3,03%	96,97%
Engineering & Construction	3,57%	10,71%	85,71%
Retail	0,00%	0,00%	100,00%
Healthcare	0,00%	0,00%	100,00%
Automotive	0,00%	0,00%	100,00%
Travel & Tourism	0,00%	7,69%	92,31%

Digital transformation is very important, by company size

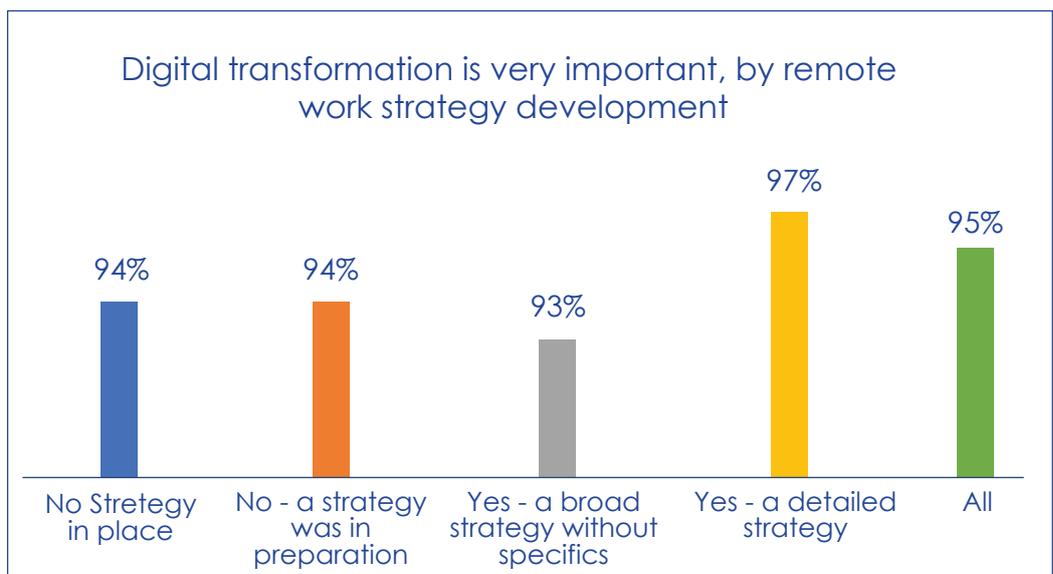
47



When segmenting those who found digital transformation to be very important, every company from the 1000+ segment said this was very important. This is likely because 1000+ companies are scaled to the point where they cannot afford not to have undergone a digital transformation strategy, which is especially true for multinationals.

	Neutral	Somewhat important	Very important
25 - 50	0,00%	6,90%	93,10%
51-100	2,05%	3,42%	94,52%
101 - 200	0,00%	6,78%	93,22%
201 - 500	0,00%	4,35%	95,65%
501 - 1000	0,00%	5,51%	94,49%
1000+	0,00%	0,00%	100,00%
All	0,75%	4,75%	94,50%

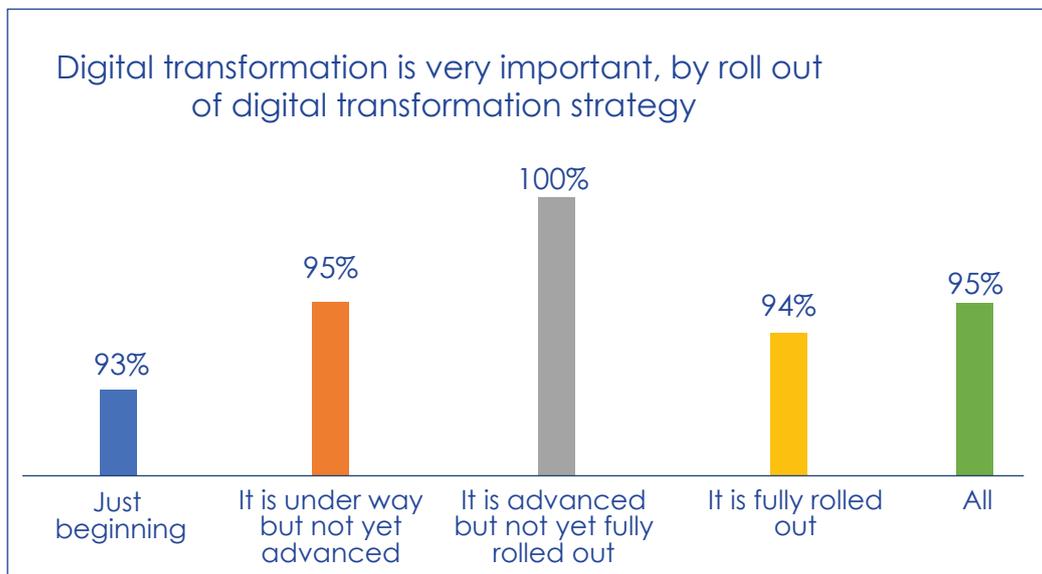
Digital transformation is very important, by remote work strategy development



From the above data, there is a directly proportional shift in perceived importance of a digital strategy compared to the roll out of a strategy for remote work. The largest proportion of response, 97%, of respondents who cited digital transformation as very important had a detailed remote work strategy. This is closely followed by other companies citing very important for digital transformation, showing the overall importance of having a digital strategy.

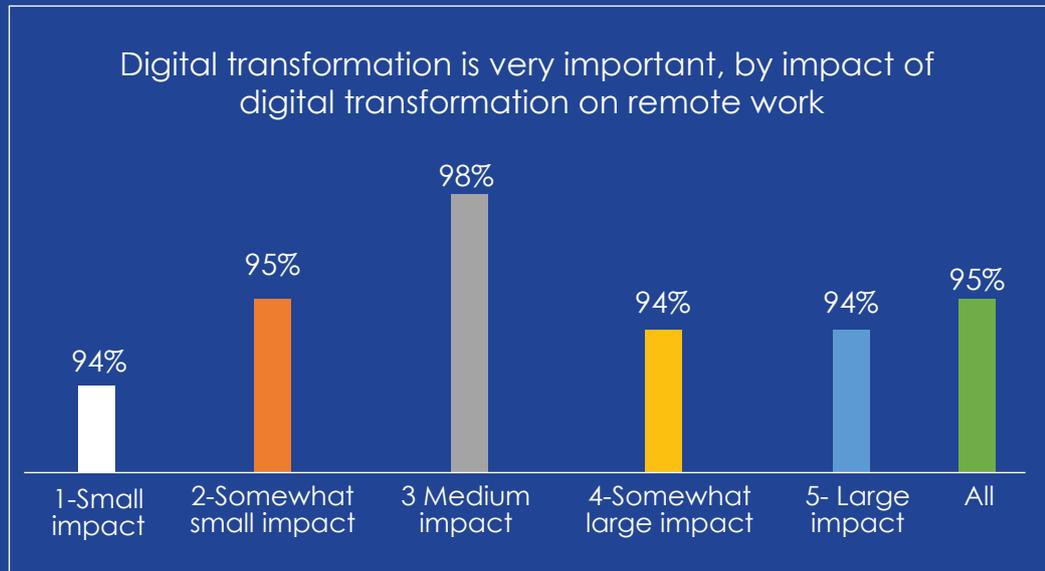
	Neutral	Somewhat important	Very important
No strategy in place	1,19%	4,76%	94,05%
No - a strategy was in preparation	0,00%	5,81%	94,19%
Yes - a broad strategy without specifics	1,47%	5,15%	93,38%
Yes - a detailed strategy	0,00%	3,19%	96,81%
All	0,75%	4,75%	94,50%

Digital transformation is very important, by roll out of digital transformation strategy



	Neutral	Somewhat important	Very important
Just beginning	3,70%	3,70%	92,59%
It is under way but not yet advanced	0,00%	4,95%	95,05%
It is advanced but not yet fully rolled out	0,00%	0,00%	100,00%
It is fully rolled out	1,34%	4,70%	93,96%
All	0,75%	4,75%	94,50%

Digital transformation is very important, by impact of digital transformation on remote work

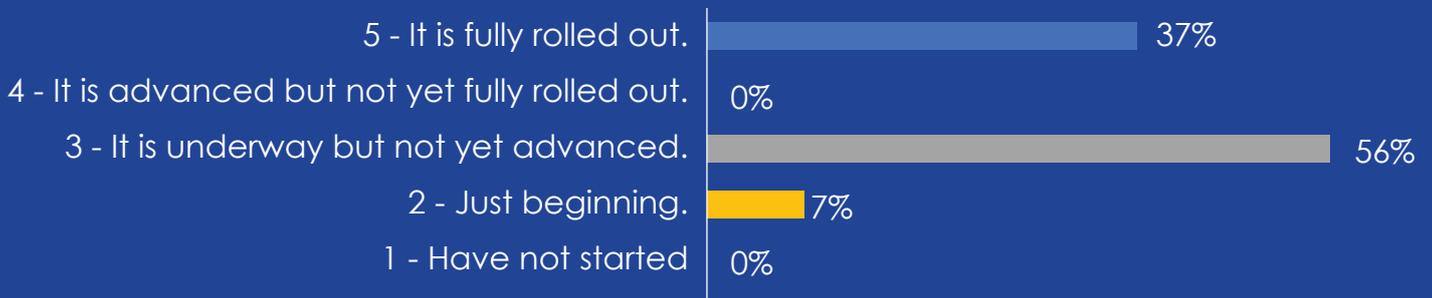


How important do you believe digital transformation (with a brief definition) is, on a scale of 1 to 5, where one is very unimportant, 5 is very important

	Neutral	Somewhat important	Very important
1 – Small impact	0,00%	6,12%	93,88%
2 – Somewhat small impact	0,00%	4,84%	95,16%
3 – Medium impact	0,00%	2,13%	97,87%
4 – Somewhat large impact	5,56%	0,00%	94,44%
5 – Large impact	0,89%	5,36%	93,75%
All	0,75%	4,75%	94,50%

How advanced are you on rolling out a digital transformation strategy?

How advanced are you on rolling out a digital transformation strategy?



While 95% report digital transformation strategy is very important, only 37% had fully rolled it out at the start of the Covid-19 crisis. Almost two-third of respondents (63%) had either just started on a strategy, or had one underway, but were not yet advanced. While this does not reflect well on current status, it does underline the extent to which businesses understand the importance of a digital transformation strategy: not a single respondent said they had not started on a digital transformation strategy.

How advanced are you on rolling out a digital transformation strategy?

1 - Have not started

2 - Just beginning.

3 - It is underway but not yet advanced.

4 - It is advanced but not yet fully rolled out.

5 - It is fully rolled out.

Distribution

0%

6,8%

56%

0%

37,3%

Success factors, by fully rolled out transformation strategy

How advanced are you on rolling out a digital transformation strategy?



Mostly the same, but look at higher outputs at home: jumping from 29% to 70%.

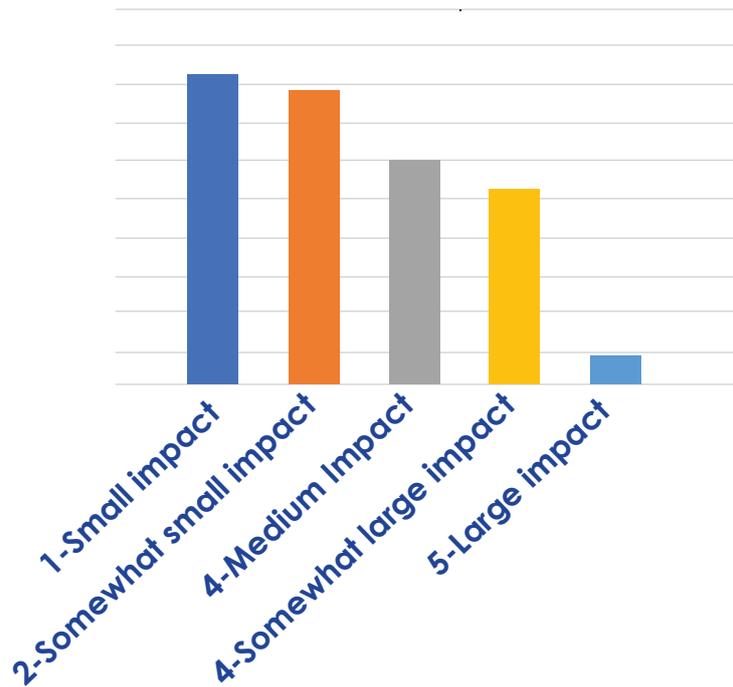
Allowing employees to work from home, by fully rolled out strategy

Allowing employees to work from home, by fully rolled out strategy



Mostly the same, except for higher outputs while working from home, which jumped from the overall 29% to 37%

To what extent has your digital transformation strategy impacted your ability to work remotely during the COVID-19 lockdown?

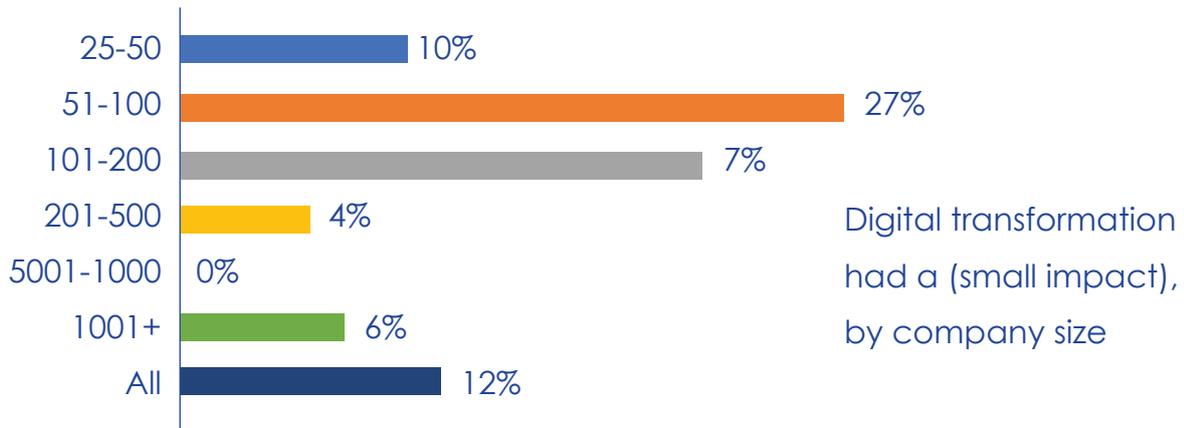


While most businesses are along their digital transformation journey, the lockdown has forced businesses to speed up their remote working strategy. Well over half (56%) of respondents said the COVID-19 lockdown had a large impact on their digital transformation strategy.

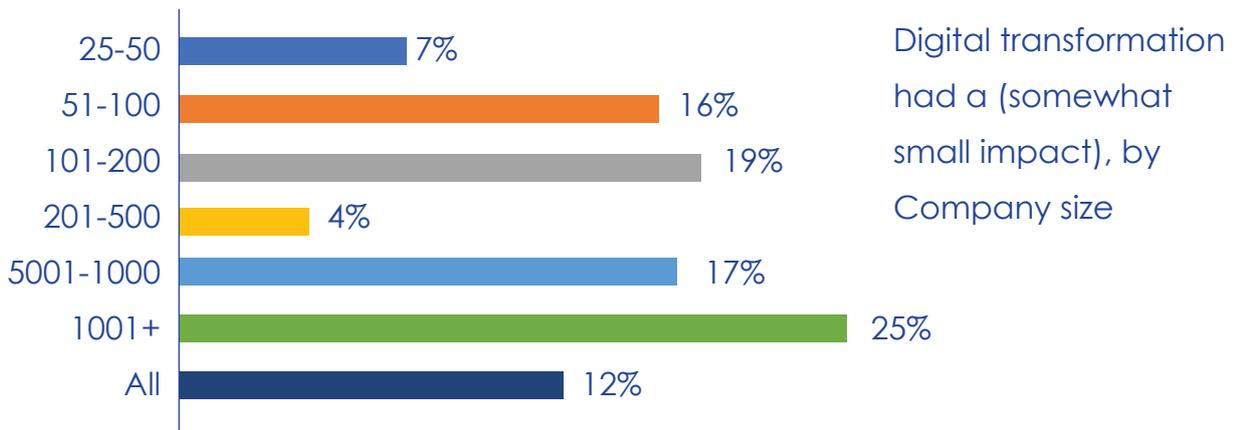
Businesses that had prepared for remote working in their digital transformation strategies had reported small and somewhat small impacts on strategy, at 28%.

To what extent has your digital transformation strategy impacted your ability to work remotely during the COVID-19 lockdown?	Distribution
1 – Small impact	12,3%
2 – Somewhat small impact	15,5%
3 – Medium impact	11,8%
4 – Somewhat large impact	4,5%
5 – Large impact	56%

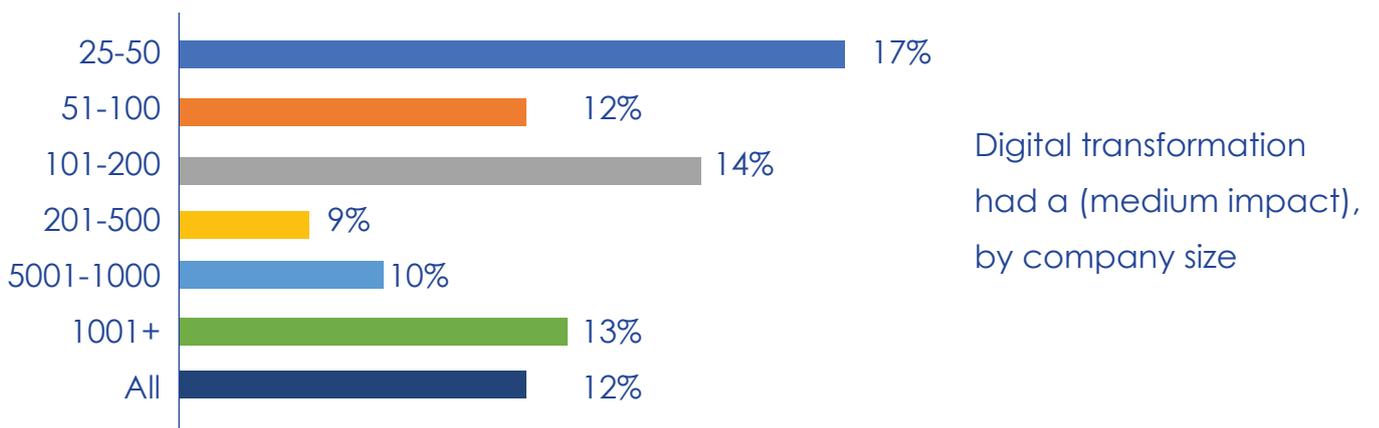
Digital transformation had a small impact, by company size



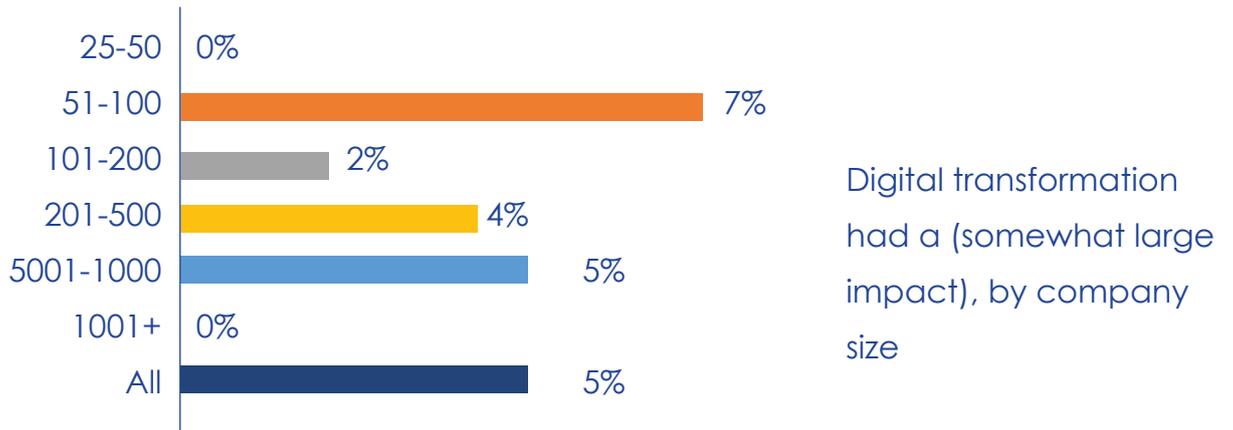
Digital transformation had a somewhat small impact, by company size



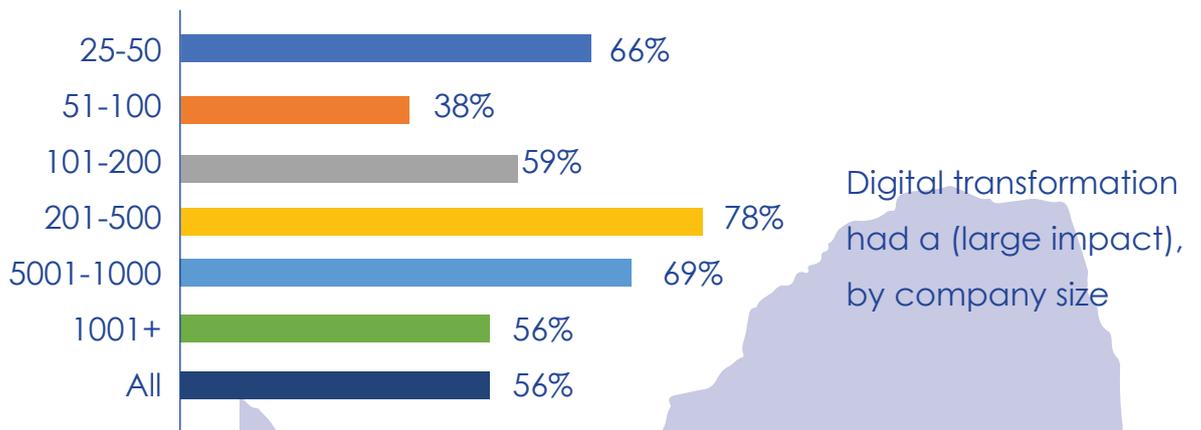
Digital transformation had a medium impact, by company size



Digital transformation had a somewhat large impact, by company size



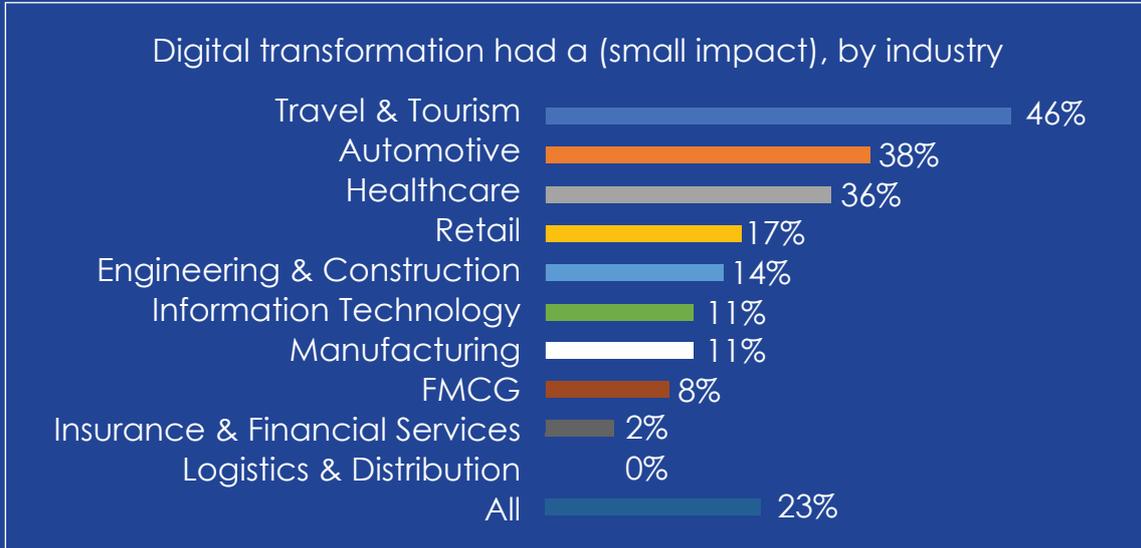
Digital transformation had a large impact, by company size



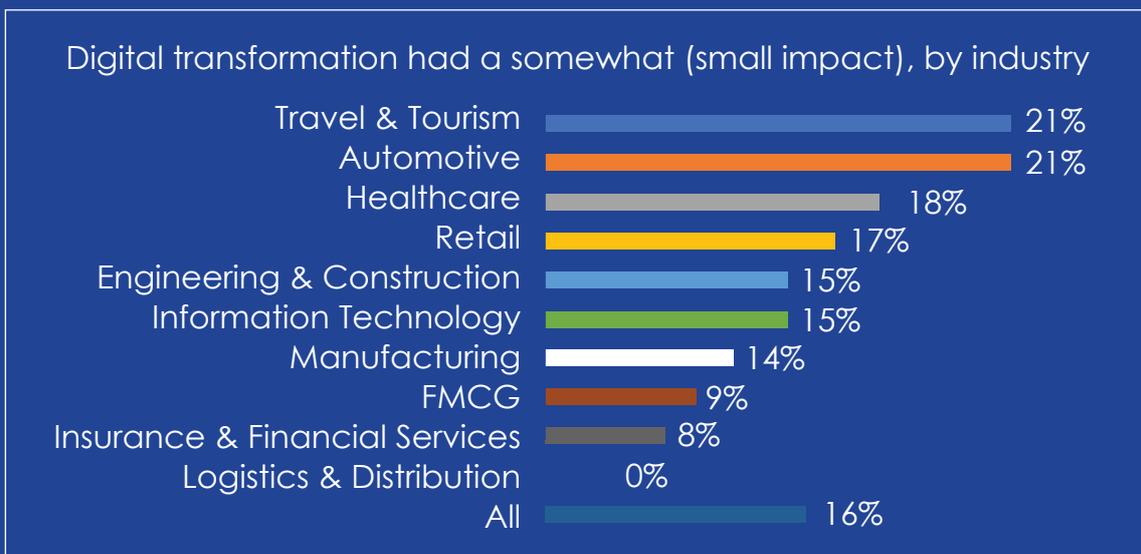
	Small impact	Somewhat small impact	Medium impact	Somewhat large impact	Large impact
25 - 50	10%	7%	17%	0%	66%
51-100	27%	16%	12%	7%	38%
101 - 200	7%	19%	14%	2%	59%
201 - 500	4%	4%	9%	4%	78%
501 - 1000	0%	17%	10%	5%	69%
1000+	6%	25%	13%	0%	56%
All	12%	16%	12%	5%	56%

Impact of digital transformation, by industry

Digital transformation had a small impact, by industry

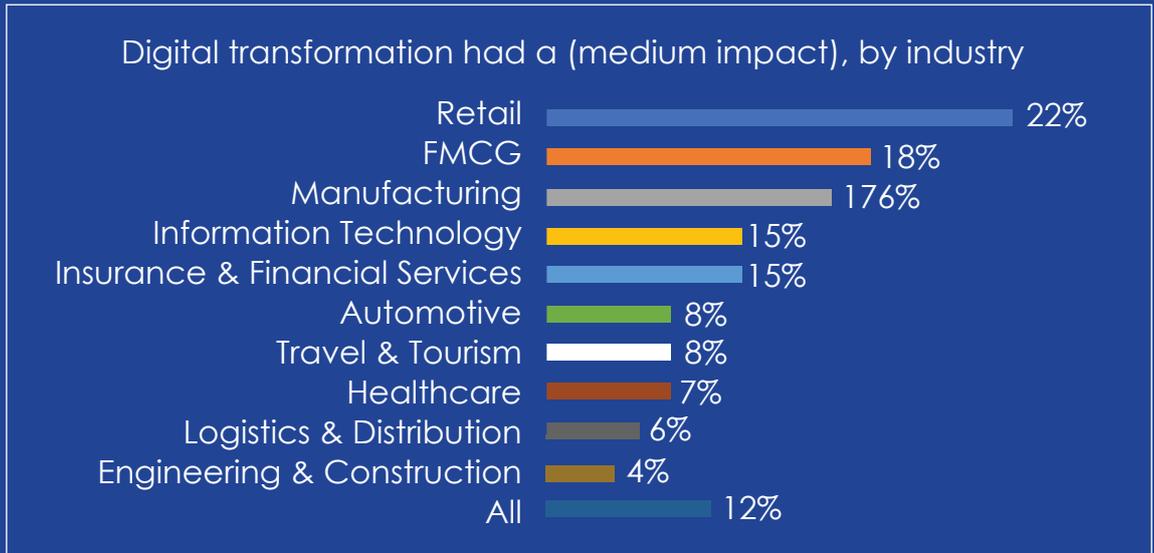


Digital transformation had a somewhat small impact, by industry

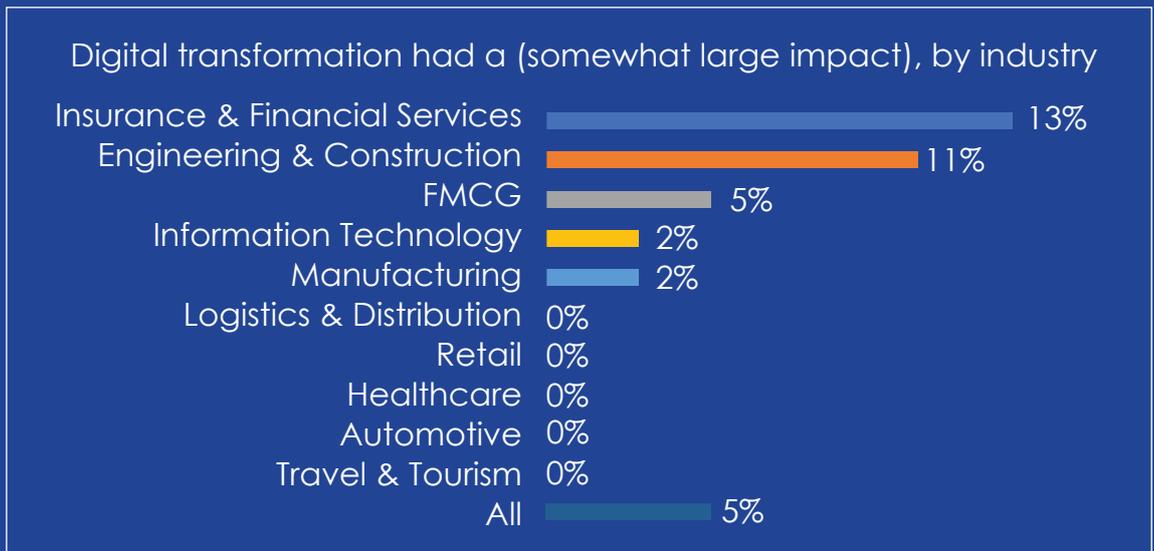


Digital transformation had a medium impact, by industry

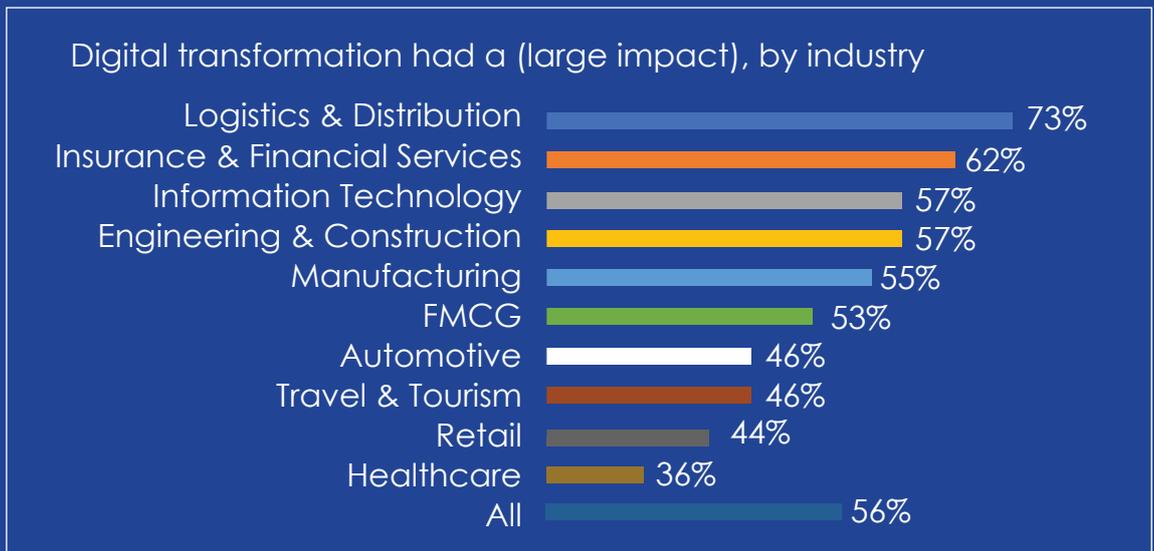
55



Digital transformation had a somewhat large impact, by industry



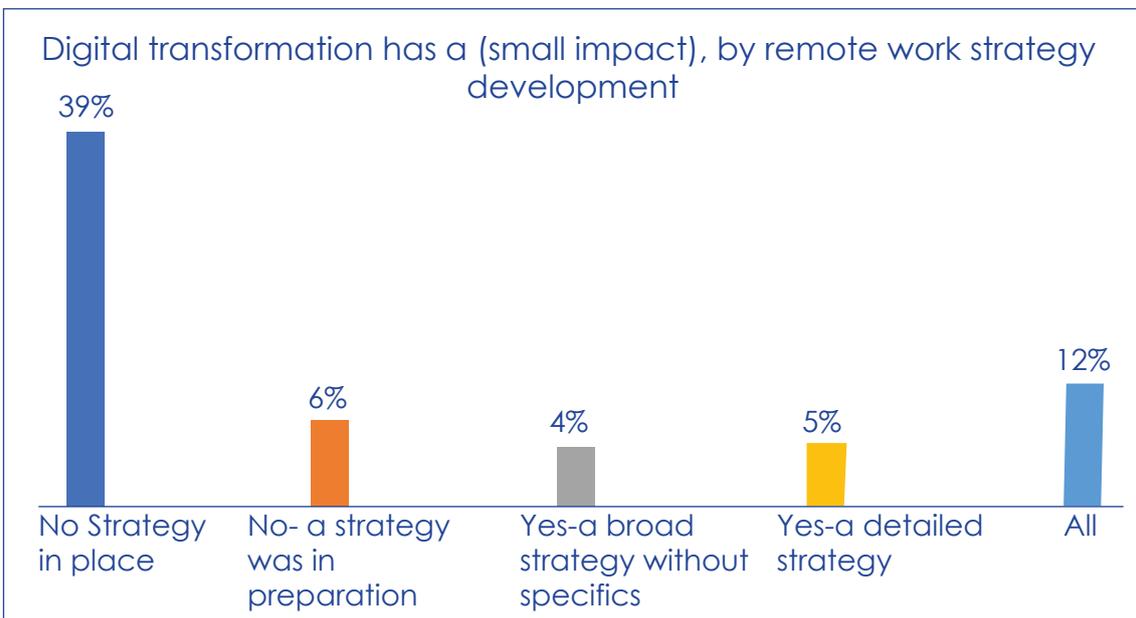
Digital transformation had a large impact, by industry



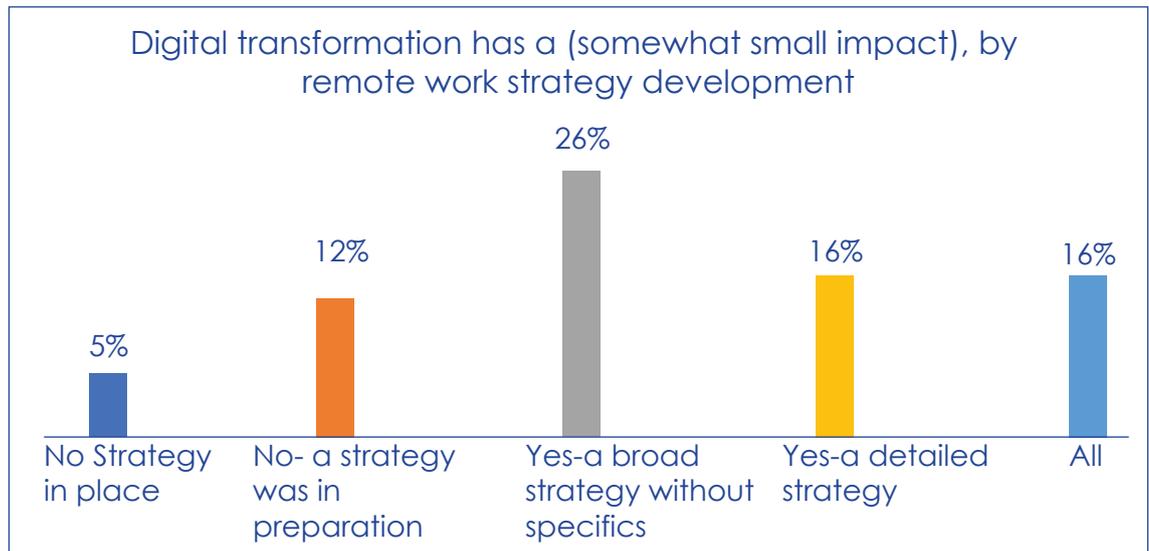
	Small impact	Somewhat small impact	Medium impact	Somewhat large impact	Large impact
Information & Technology	11%	15%	15%	2%	57%
Insurance & Financial Services	2%	9%	15%	13%	62%
Manufacturing	11%	15%	17%	2%	55%
FMCG	8%	18%	18%	5%	53%
Logistics & Distribution	0%	21%	6%	0%	73%
Engineering & Construction	14%	14%	4%	11%	57%
Retail	17%	17%	22%	0%	44%
Healthcare	36%	21%	7%	0%	36%
Automotive	38%	8%	8%	0%	46%
Travel & Tourism	46%	0%	8%	0%	46%
All	12%	16%	12%	5%	56%

Extent of digital transformation, by remote work strategy development

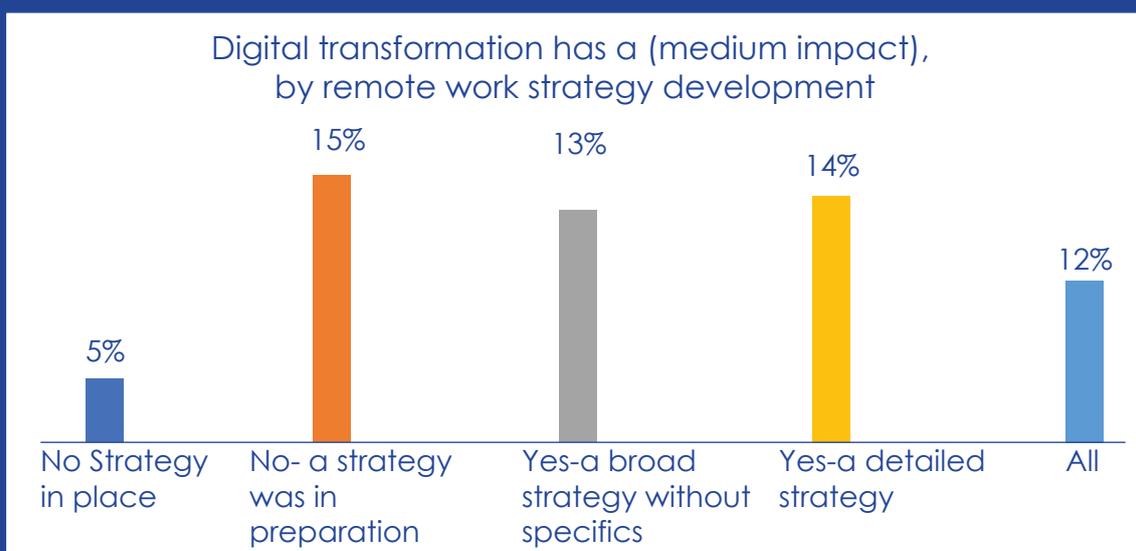
Digital transformation has a small impact, by remote work strategy development



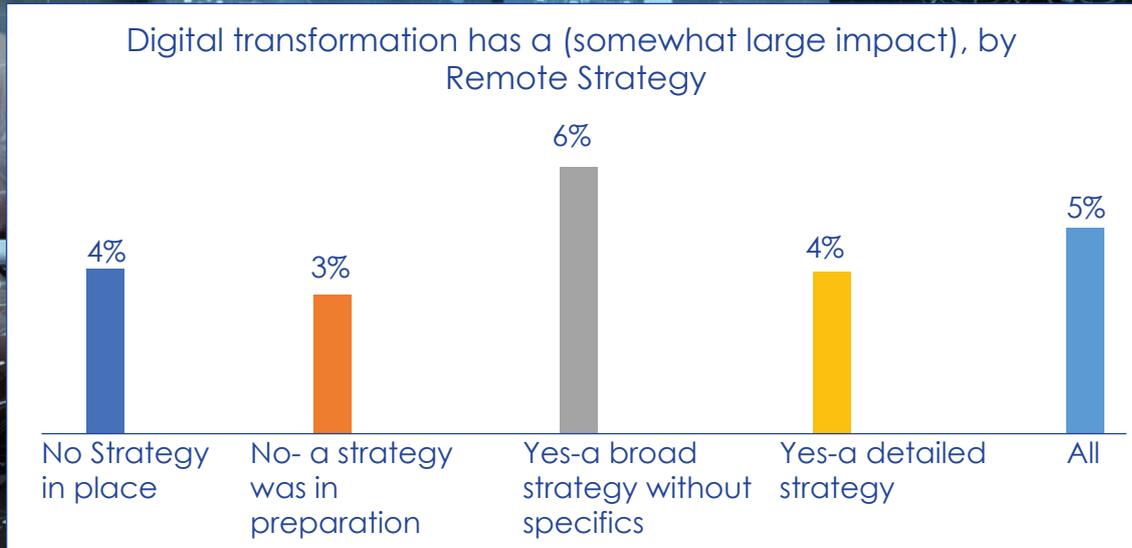
Digital transformation has a somewhat small impact, by remote work strategy development



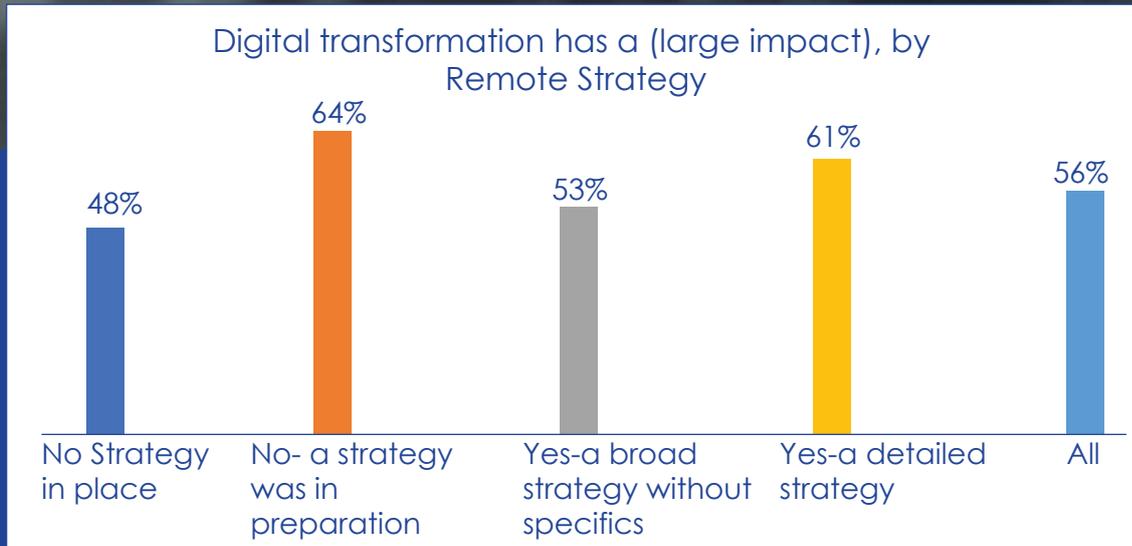
Digital transformation has a medium impact, by remote work strategy development



Digital transformation has a somewhat large impact, by remote work strategy development



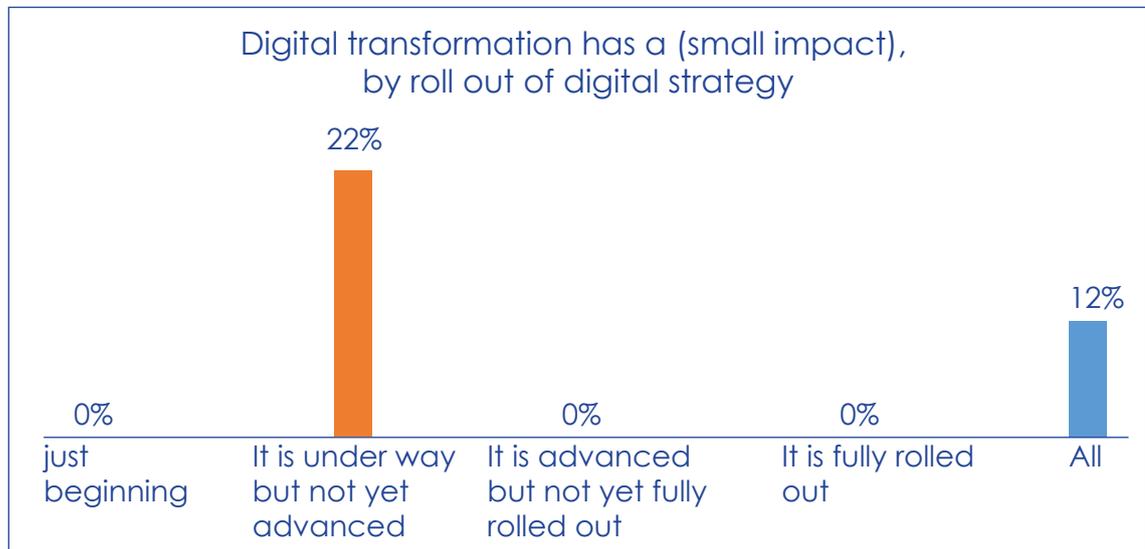
Digital transformation has a large impact, by remote work strategy development



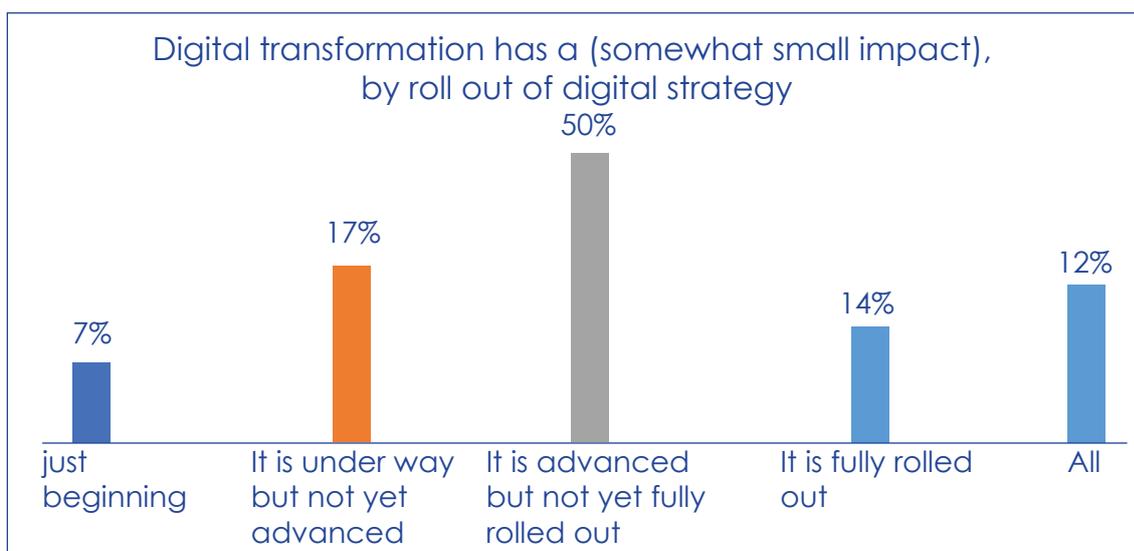
	Small impact	Somewhat small impact	Medium impact	Somewhat large impact	Large impact
No - a strategy was in preparation	6%	12%	15%	3%	64%
No strategy in place	39%	5%	5%	4%	48%
Yes - a broad strategy without specifics	4%	24%	13%	6%	53%
Yes - a detailed strategy	5%	16%	14%	4%	61%
All	12%	16%	12%	5%	56%

Extent of digital transformation, by roll out of digital strategy

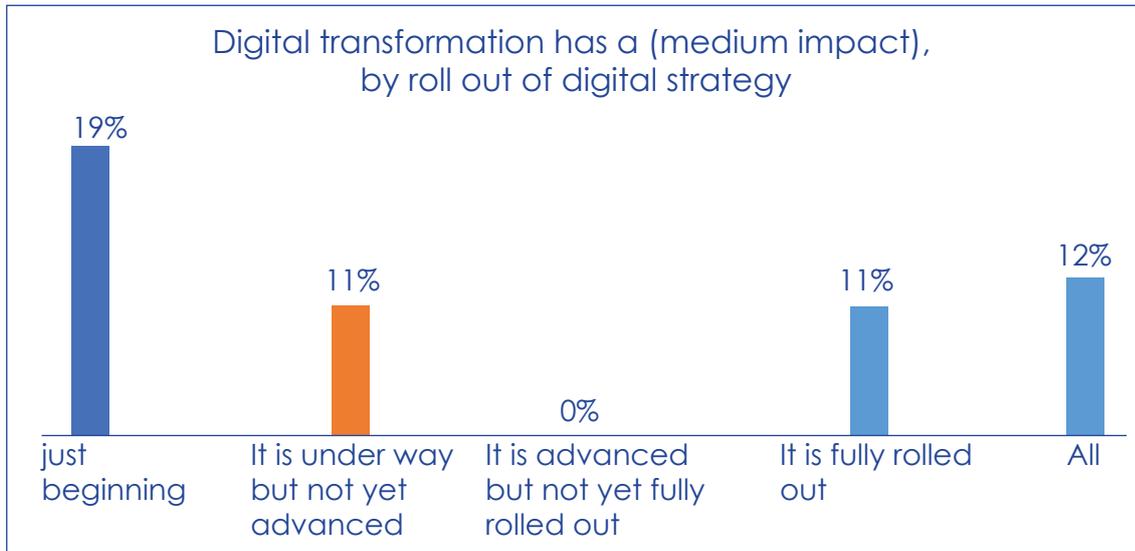
Digital transformation has a small impact, by roll out of digital strategy



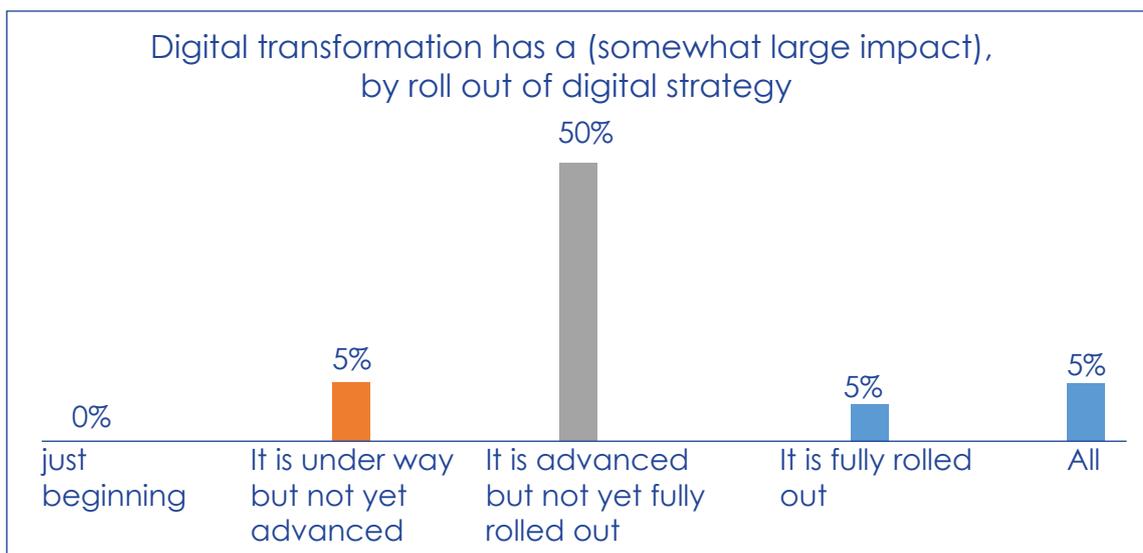
Digital transformation has a somewhat small impact, by roll out of digital strategy



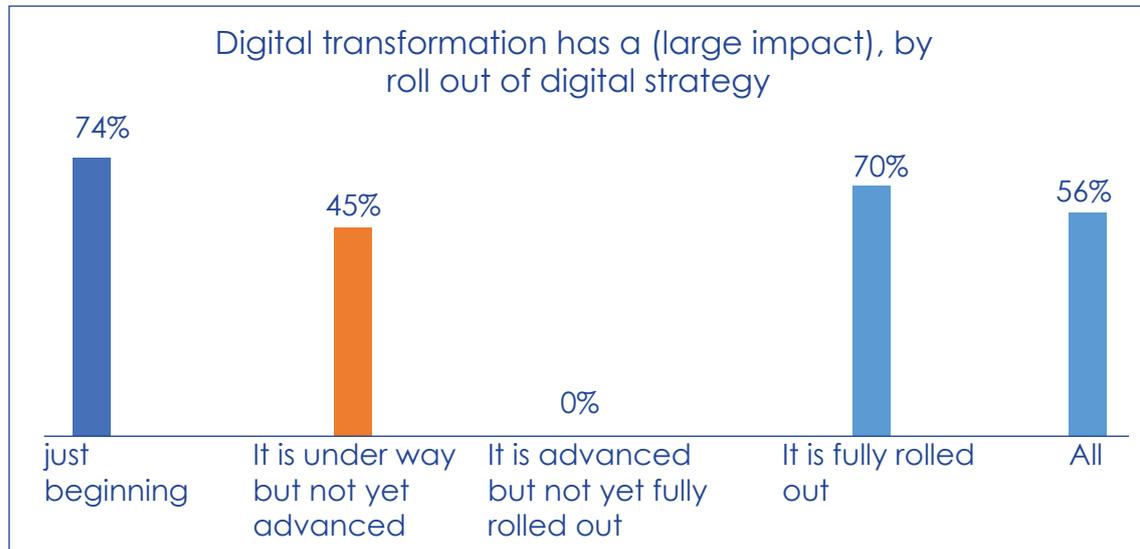
Digital transformation has a medium impact, by roll out of digital strategy



Digital transformation has a somewhat large impact, by roll out of digital strategy



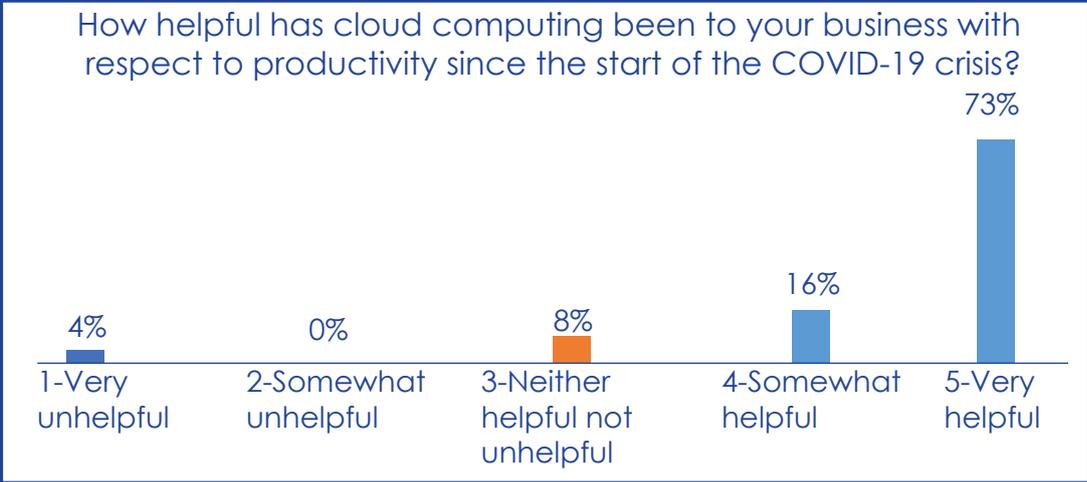
Digital transformation has a large impact, by roll out of digital strategy



	Small impact	Somewhat small impact	Medium impact	Somewhat large impact	Large impact
Just beginning	0%	7%	19%	0%	74%
It is under way but not yet advanced	22%	17%	11%	5%	45%
It is advanced but not yet fully rolled out	0%	50%	0%	50%	0%
It is fully rolled out	0%	14%	11%	4%	70%
All	12%	16%	12%	5%	56%

How helpful has cloud computing been to your business with respect to productivity since the start of the COVID-19 crisis?

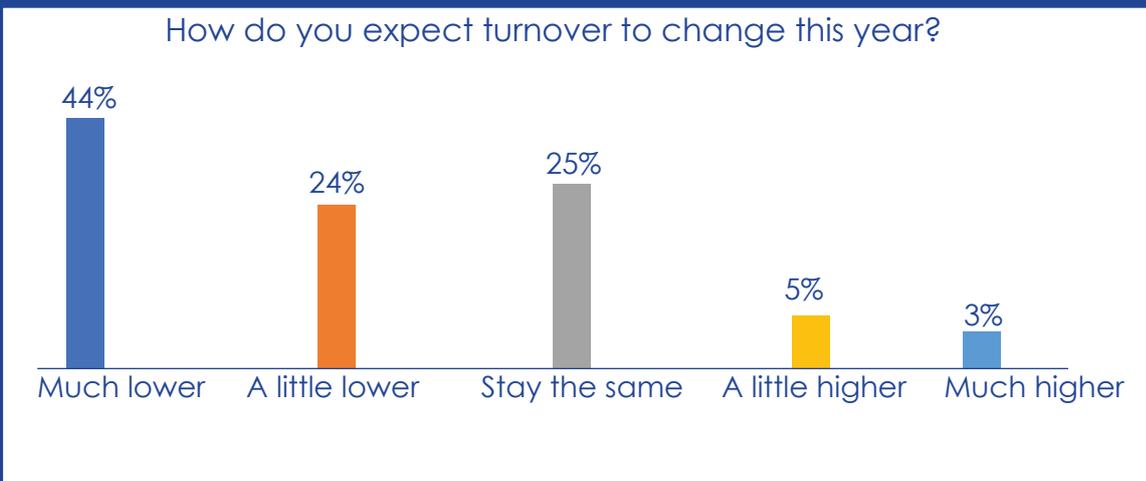
Cloud computing is at the heart of collaborative, remote working. This became evident when nearly three-quarters of businesses reported that cloud software has been very helpful with respect to productivity since the start of the COVID-19 crisis and the surrounding restrictions.



How helpful has cloud software been to your business with respect to productivity, pre-COVID-19 lockdown?	Distribution
1 – Very unhelpful	3,8%
2 - Somewhat unhelpful	0,3%
3 – Neither helpful not unhelpful	7,5%
4 – Somewhat helpful	15,8%
5 – Very helpful	72,8%

How do you expect turnover to change this year?

Despite all the preparation and positive technology outlook, for the first time in many years, the majority of businesses reported their turnover to become much lower this year, at 44%. This is a result of movement restrictions, and the economy shifting into junk status. What is comforting is the quarter of businesses expecting their turnover to remain the same for this year.



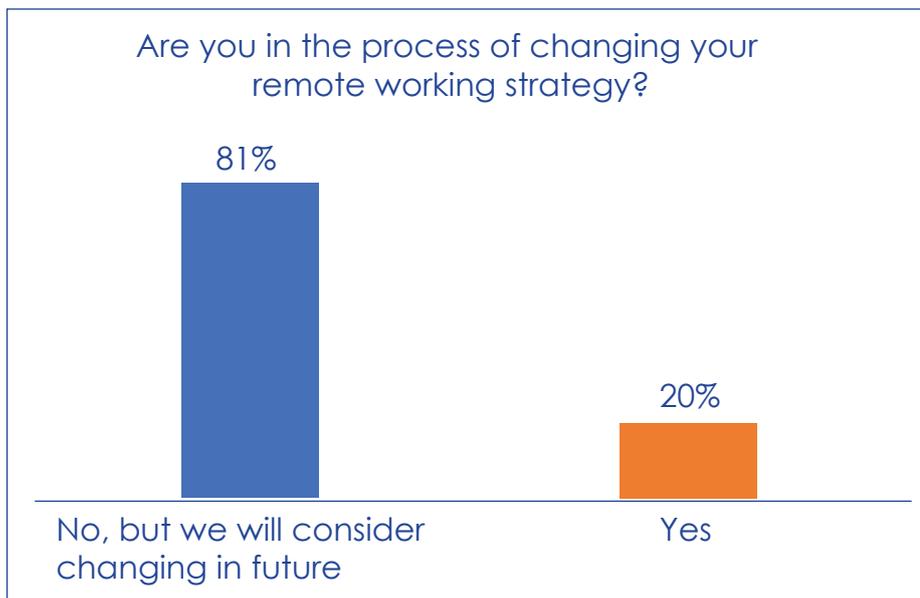
How do you expect turnover to change this year?	Distribution
Much lower	43,8%
A little lower	23,8%
Stay the same	24,5%
A little higher	5%
Much higher	3%

R

Remote working strategy in future



Are you changing your remote working strategy for beyond the COVID-19 crisis?

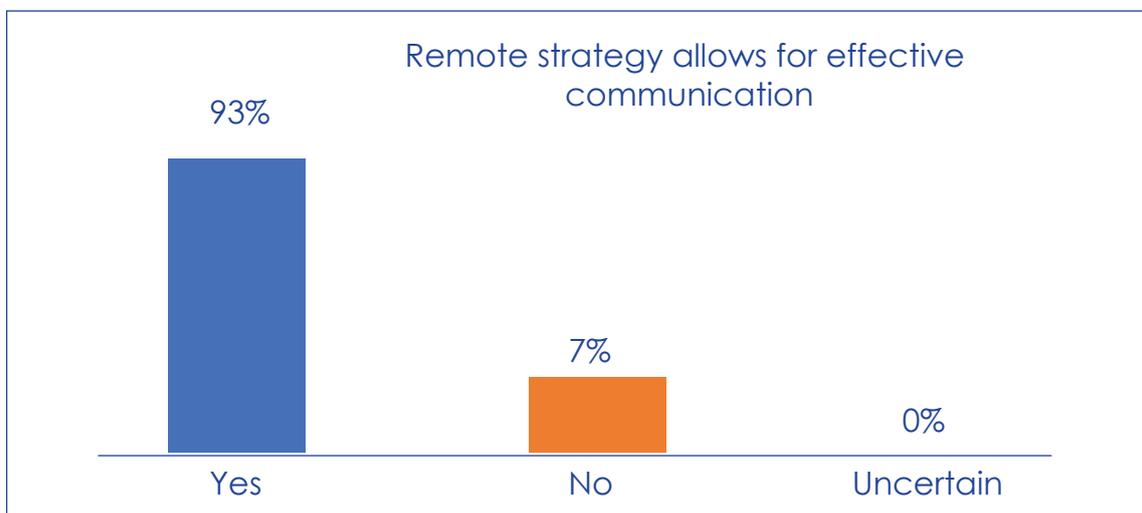


A large proportion (81%) of respondents reported they were not in the process of implementing a remote strategy, but would consider changing it in the future. This proportion shows two types of respondents: those with an effective remote working strategy, and those who have yet to implement a strategy but will be implementing one soon.

Are you in the process of changing your remote working strategy?	Distribution
No, but we will consider changing it in future	80,5%
Yes	19,5%

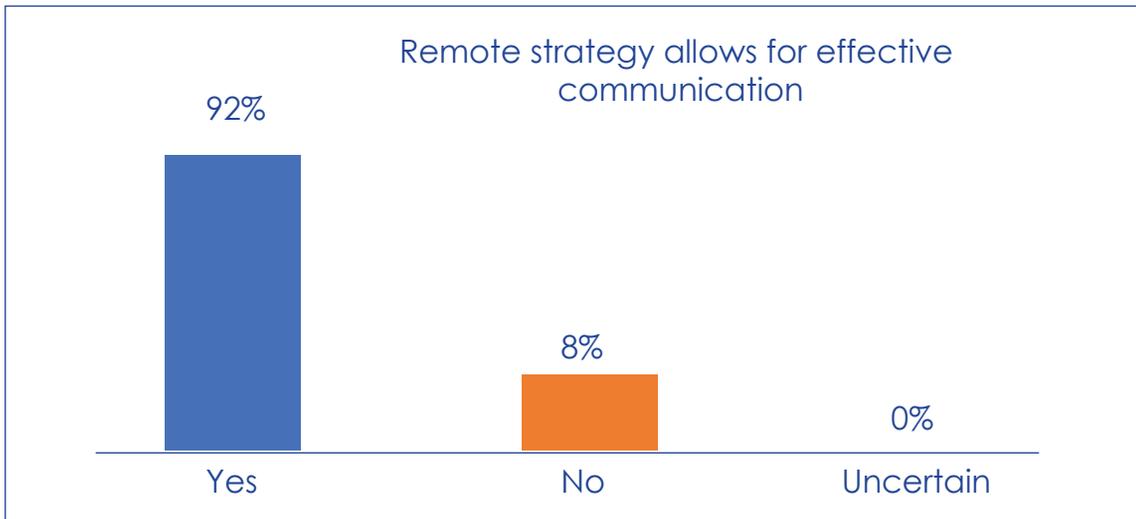
Do you identify with these statements?

Remote strategy is efficient



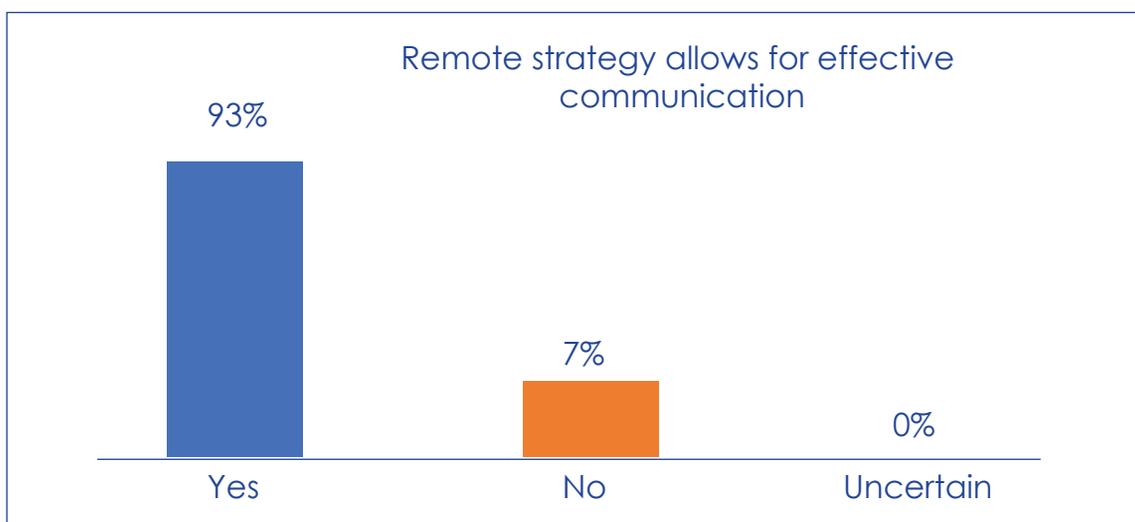
A large proportion (93%) of businesses found remote strategy to be efficient, which suggests that outputs are similar in remote work as they are in the office

Remote strategy allows for effective communication



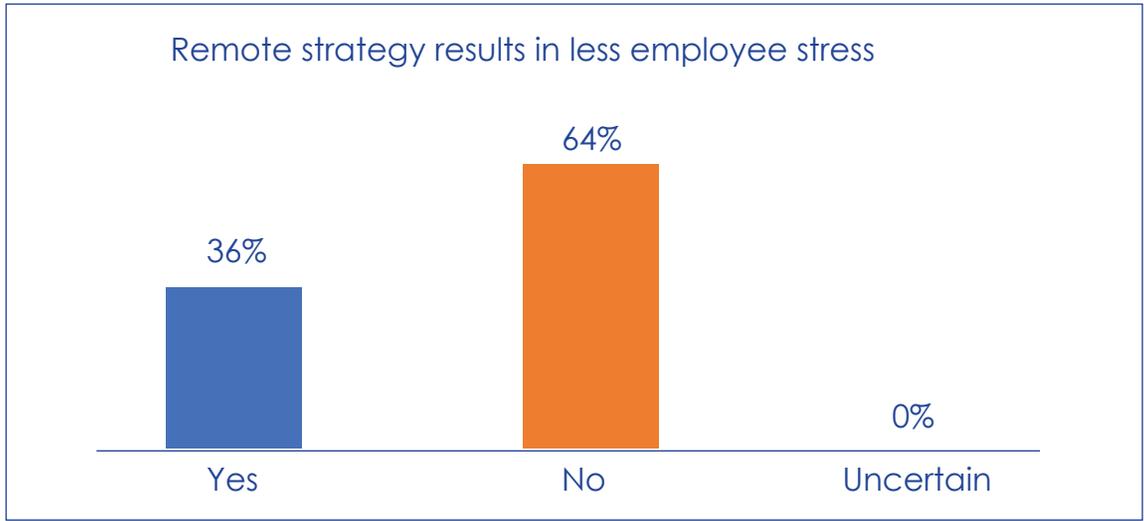
The largest proportion (92%) of businesses found remote strategy to be effective for communication, which is most likely thanks to the 'digital paper trail' that creates for effective tracking of communication.

Remote strategy tracks outputs clearly



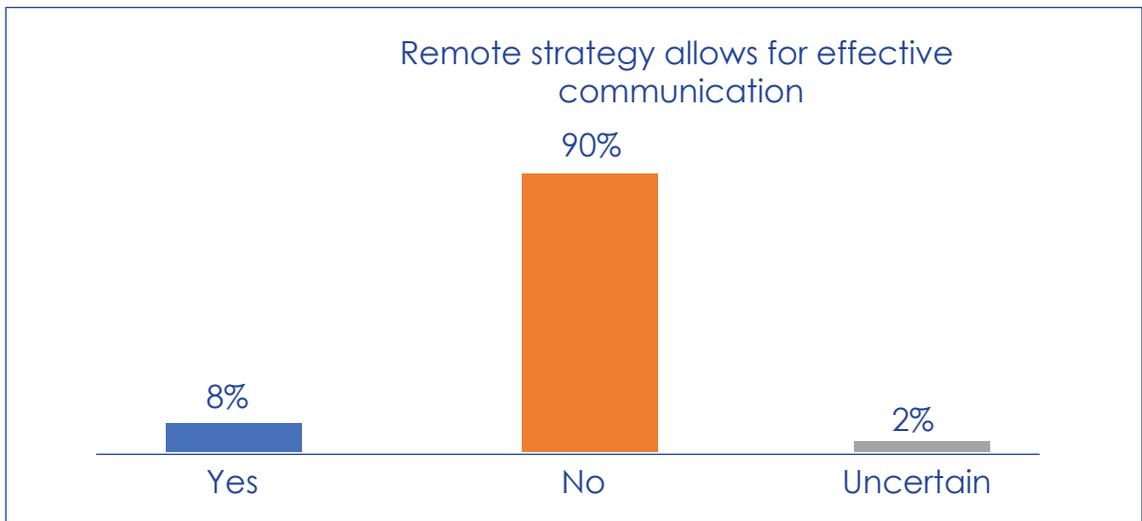
A large proportion (93%) of businesses said that remote strategy tracks outputs clearly. This is most likely thanks to outputs being clearly labelled by collaborative tools (like Google Docs, Office 365) as well as by task management tools.

Remote strategy results in less employee stress



While a remote strategy is good for business, it may not be comfortable for the uncertain employee. 64% of businesses say that remote strategy does not result in less employee stress. When comparing this with the high skill levels and effective/efficient workflows with remote tools, this stress can be attributed to the uncertainty of being home consistently during the lockdown period. Along with this, employees are technically contactable at any time of the day, which may cause more stress than being at an office.

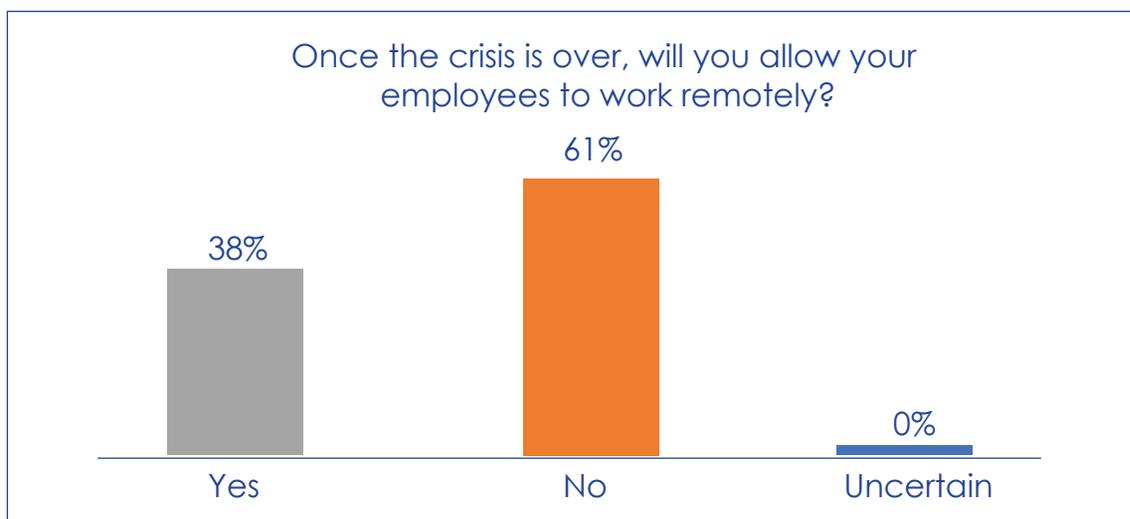
Remote strategy results in less stress for me



Managers also face similar or higher stress levels while working remotely, as 90% of decision-makers reported remote strategy did not result in lower stress levels for them. Factors that affect employees most likely affect managers and decision-makers, in addition to the pressures of deadlines and quotas that need to be met remotely in this unfamiliar remote working territory.

Identify with these statements	Yes	No	Uncertain
Remote strategy is efficient	92,5%	7,5%	0%
Remote strategy allows for effective communication	91,8%	8,2%	0%
Remote strategy tracks outputs clearly	93,1%	6,9%	0%
Remote strategy results in less employee stress	36%	64%	0%
Remote strategy results in less stress for me	8,3%	90%	1,8%

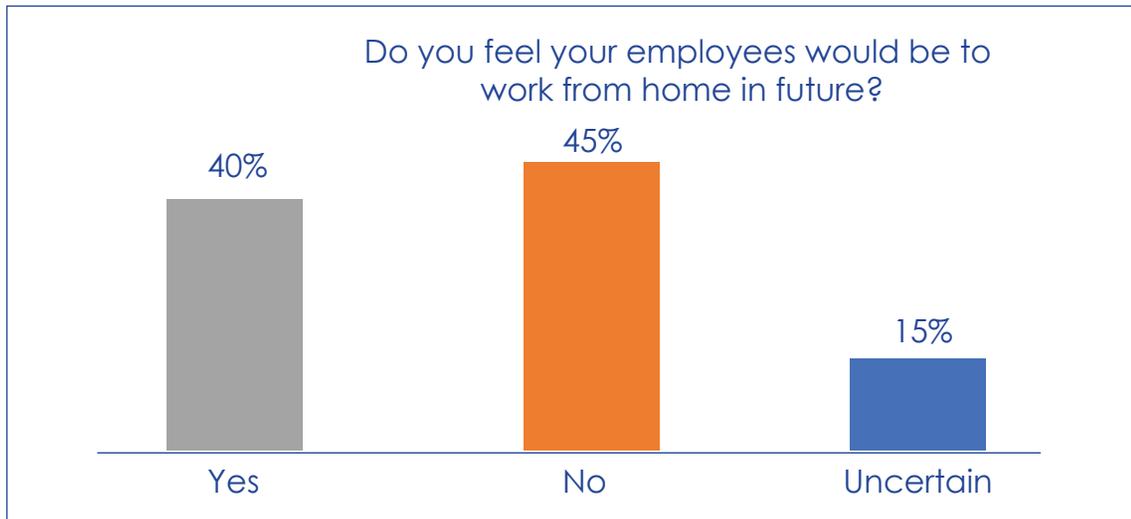
Once the crisis is over, will you allow your employees to work remotely?



Respondents were asked about whether or not they will allow their employees to work from remotely after the pandemic crisis ends. Under two thirds (61%) were uncertain if they would, while over a third (38%) said they would allow their employees to work from home in future.

Once the crisis is over, will you allow your employees to work remotely?	Distribution
No	1,3%
Uncertain	60,5%
Yes	38,3%

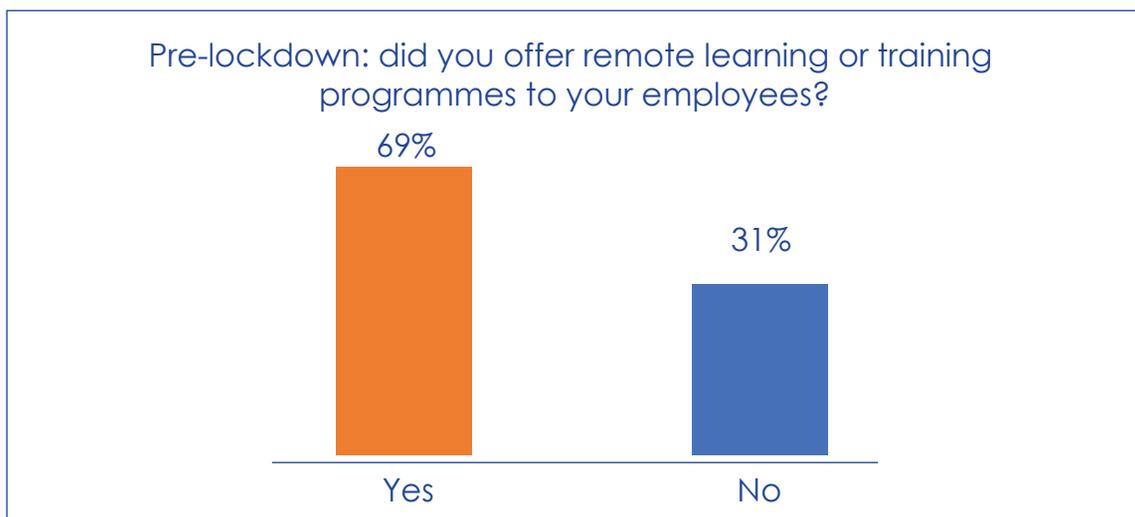
Do you feel your employees would be able to work from home in future?



Respondents were asked if their employees would want to work from home in future. 4 in 10 said their employees would want to work from home in future, which corresponds with the previous question's allowance of working from home. This is followed by employees being uncertain of their employee's work location preferences, at 45%, then by 15% who felt their employees wouldn't want to work remotely. The latter proportion is most likely because of poor remote equipment and/or bad connectivity.

Do you feel your employees would be to work from home in future?	Distribution
No	15%
Uncertain	45,3%
Yes	39,8%

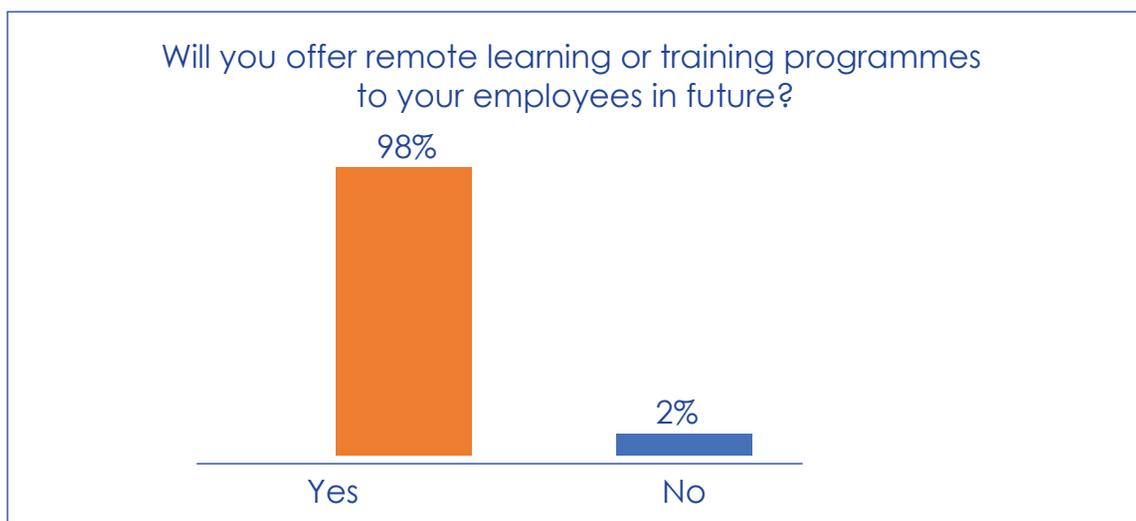
Did you offer remote learning or training programmes to your employees, pre-COVID-19?



Before the COVID-19 pandemic, over two-thirds of businesses offered some form of remote learning or training programme to their employees. This was most likely in the form of paid webinars, or online upskilling services like Udemy, Coursera, or University of Cape Town Online.

Did you offer remote learning or training programmes to your employees, pre-COVID-19?	Distribution
No	31%
Yes	69%

Will you offer remote learning or training programmes to your employees in future?



Rising from over two thirds before the pandemic, nearly all businesses (98%) report they will offer remote learning programmes in future. This method of training is becoming increasingly affordable and less time-consuming because employees can be trained on a skill-by-skill basis, which is not offered by a traditional degree or diploma.

Will you offer remote learning or training programmes to your employees in future?	Distribution
No	1,8%
Yes	98,3%



Conclusion

The outlook for remote working is positive, considering two key trends that emerge from this study:

- Every single organisation is on the path to digital transformation, although many are only in its early stages. Considering that digital transformation is the key to increased productivity in remote working, this suggests that, over time, most large organisations should begin to see this benefit.
- The big jump in the already-high proportion of respondents who are committed to training staff in remote learning and training programmes indicates both strong awareness of the need for such training, and resultant likely enhancement of skills in remote working and collaboration.

In combination, these two trends underline the findings summed up in the executive summary above, pointing to the massive benefits of digital transformation, of the full digitalisation of the office space, and of collaboration via digital platforms.



Contact

The study was authored by **Arthur Goldstuck**, managing director of World Wide Worx. He is author of 19 books, including *The Hitchhiker's Guide to the Internet*, and *Tech-Savvy Parenting*. As principal analyst, he leads **World Wide Worx's** groundbreaking research. He was assisted by Bryan Turner in data analysis for *Remote Working in South Africa 2020*.

About World Wide Worx

World Wide Worx conducts independent, sponsored and commissioned research projects, in areas ranging from cloud computing and digital transformation to ecommerce and digital consumer trends. We provide talks, commentary and thought leadership on business and digital trends for media and at corporate events.

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