

A woman with dark hair tied up, wearing a white patterned long-sleeve shirt and blue jeans, is sitting on a grey sofa. She is smiling and looking at a laptop computer she is holding on her lap. The room is bright with large windows in the background, and there are green plants visible. The overall atmosphere is relaxed and professional.

Remote Work Readiness Index

South Korea

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

DELLTechnologies



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2. KEY FINDINGS
3. ATTITUDES TOWARD REMOTE WORKING
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Dell Technologies Remote Work Readiness Index

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



Research Goal

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



Methodology

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



Participants

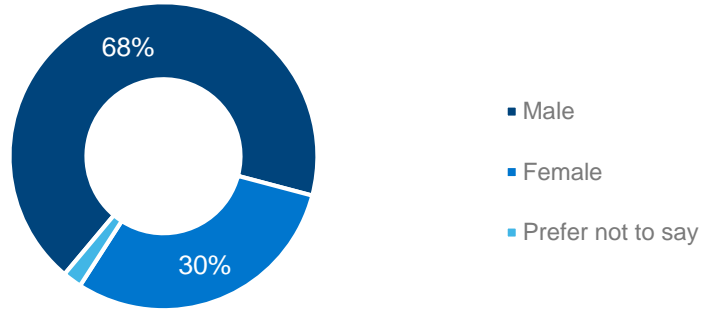
More than 7,000 individuals across the APJ region (of which 1,023 were from South Korea) completed the survey. All were full-time working professionals aged 18 years and above who were and/or have been working from home to some degree throughout their respective national COVID-19 control measures. Demographic 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.

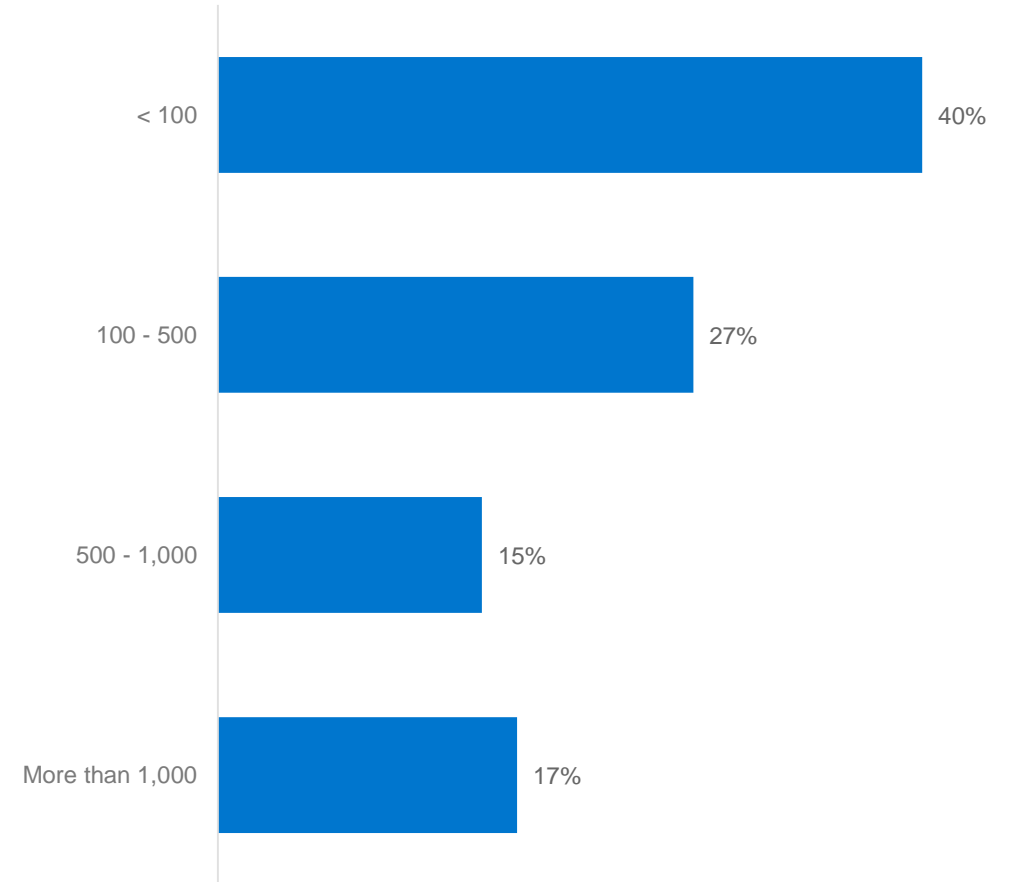
Respondents' Profile

A total of 1,023 employees in South Korea participated in the research. Of those surveyed, we sought to understand their gender and age, and the size of the organisation they belong to.

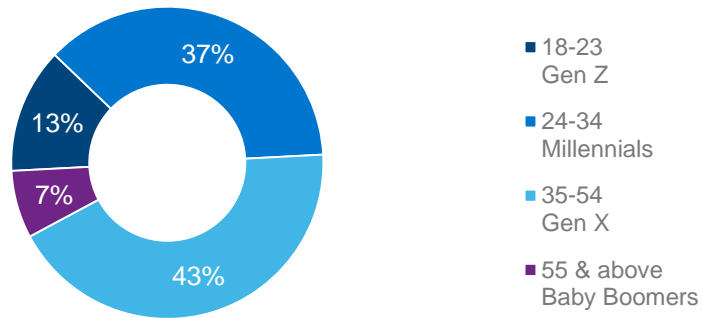
GENDER



ORGANISATIONAL SIZE



AGE





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Key Findings

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

At least seven in 10 feel prepared to work remotely for the long term. But only 38% feel that their company fully supports remote work.

2 EMPLOYEES ARE WORRIED ABOUT BLURRING BOUNDARIES BETWEEN WORK AND PERSONAL LIVES IN A LONG-TERM REMOTE WORK ARRANGEMENT.

When thinking about remote work in the long term, employees are concerned about the blurring boundaries between professional & personal lives, delays to work delivery due to complexity in coordination with teams working remotely, and maintaining connection with their colleagues.

3 EMPLOYEES FEEL THAT THEIR EMPLOYER CAN DO MORE TO PROVIDE TECHNOLOGY AND HR-RELATED RESOURCES.

In order to enable successful remote work, only 35% feel that their employer is doing everything they can to provide the necessary tech resources; only 30% feel that their employer is doing everything they can to provide the necessary HR support and resources.

4 EMPLOYEES FIND THE NEED TO USE PERSONAL PRODUCTIVITY TOOLS THE GREATEST TECH CHALLENGE WHILE REMOTE WORKING.

Access to company-issued productivity equipment/ tools ranks among the top three tech resources that employees want employers to provide. Other desired tech support include access to internal company resources and virtual collaboration and communication tools.

5 EMPLOYEES FEEL THAT UPDATED POLICIES AND GUIDELINES FOR REMOTE WORK ARE NECESSARY.

Other HR-related resources and support that employees want while remote working are team engagement initiatives and learning and development sessions, including training for virtual tools.



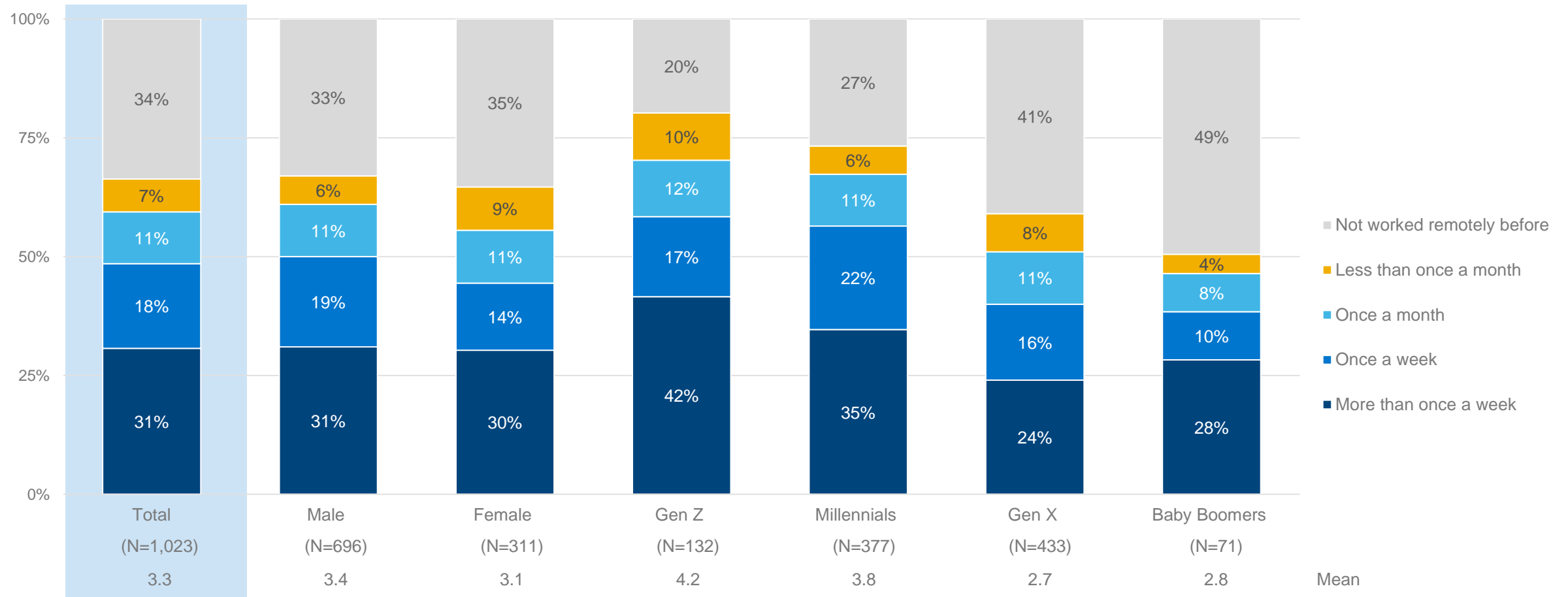
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Nearly seven in 10 employees had worked remotely before the period of social distancing

- Remote working is not new to South Korean employees, with 66% having worked remotely to some degree before social distancing measures were implemented.
- On average, South Korean employees worked remotely at least 3.3 days a month before the period of social distancing.
- Eight in 10 Gen Z employees had worked remotely before, the highest across age segments. Gen Z employees also worked remotely most frequently (4.2 days/ month) compared to any other age groups.
- Baby Boomers constitute the largest percentage of those who had not worked remotely before social distancing came into effect (49%).

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



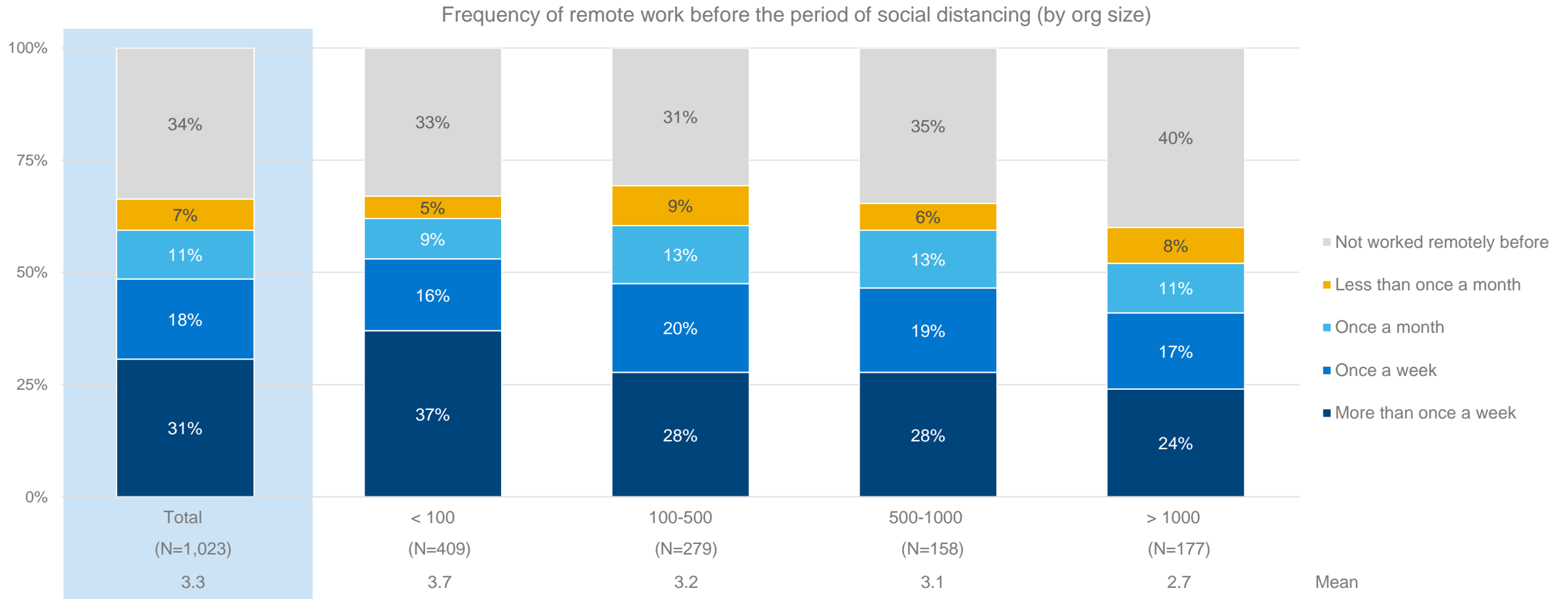
Q1. How frequently did you work remotely before the period of social distancing in South Korea?

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



More employees in large organisations had not worked remotely before social distancing

- 40% of employees in large organisations with more than 1,000 employees had not worked remotely before the period of social distancing, the highest percentage among organisations of all sizes.
- Employees in small organisations with less than 100 employees had worked remotely most frequently, averaging at least 3.7 days a month.

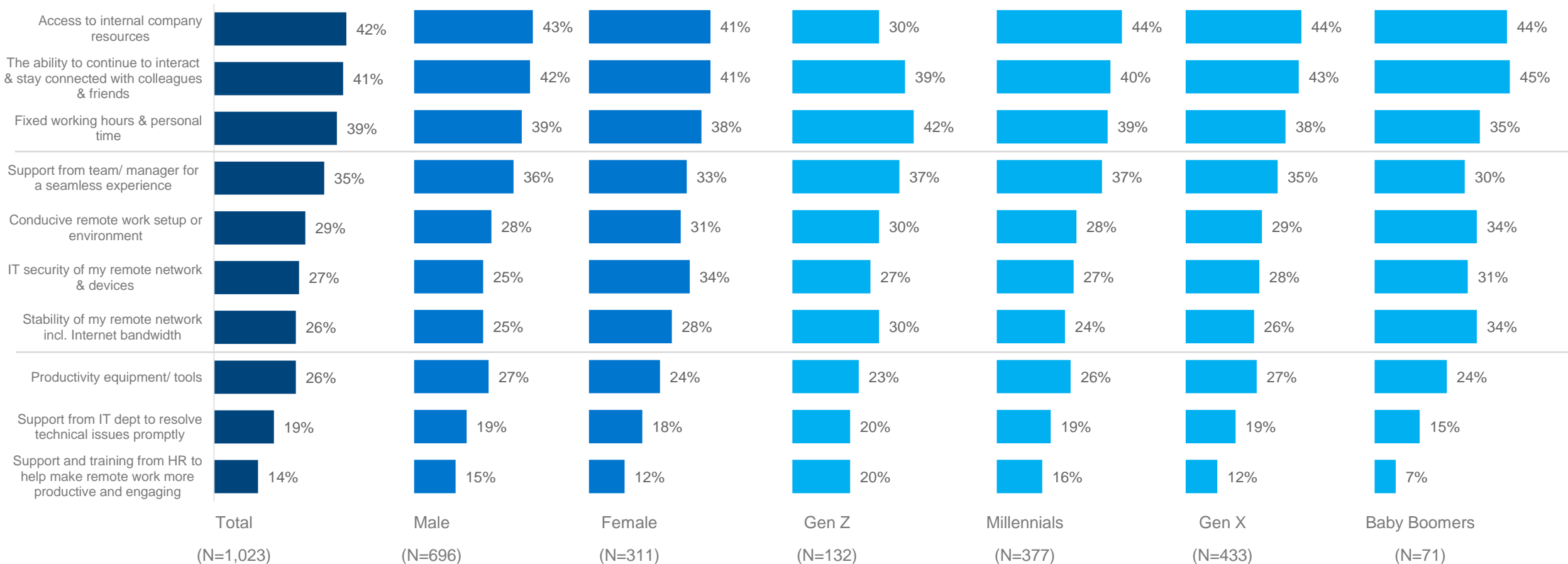


Q1. How frequently did you work remotely before the period of social distancing in Korea?

Access to internal company resources, ability to interact and stay connected, and fixed working hours & personal time are the most important factors for employees during remote working

- 42% of employees rate access to internal company resources as the most important factor during remote working. For Gen Z employees, however, the most important factor is fixed working hours & personal time.
- Female employees (34%) prioritise IT security of their remote network & devices more than male employees (25%).
- Baby Boomers see the importance of a conducive remote work setup or environment (34%) and stability of their remote network, including Internet bandwidth (34%), more than others across all age groups.

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.

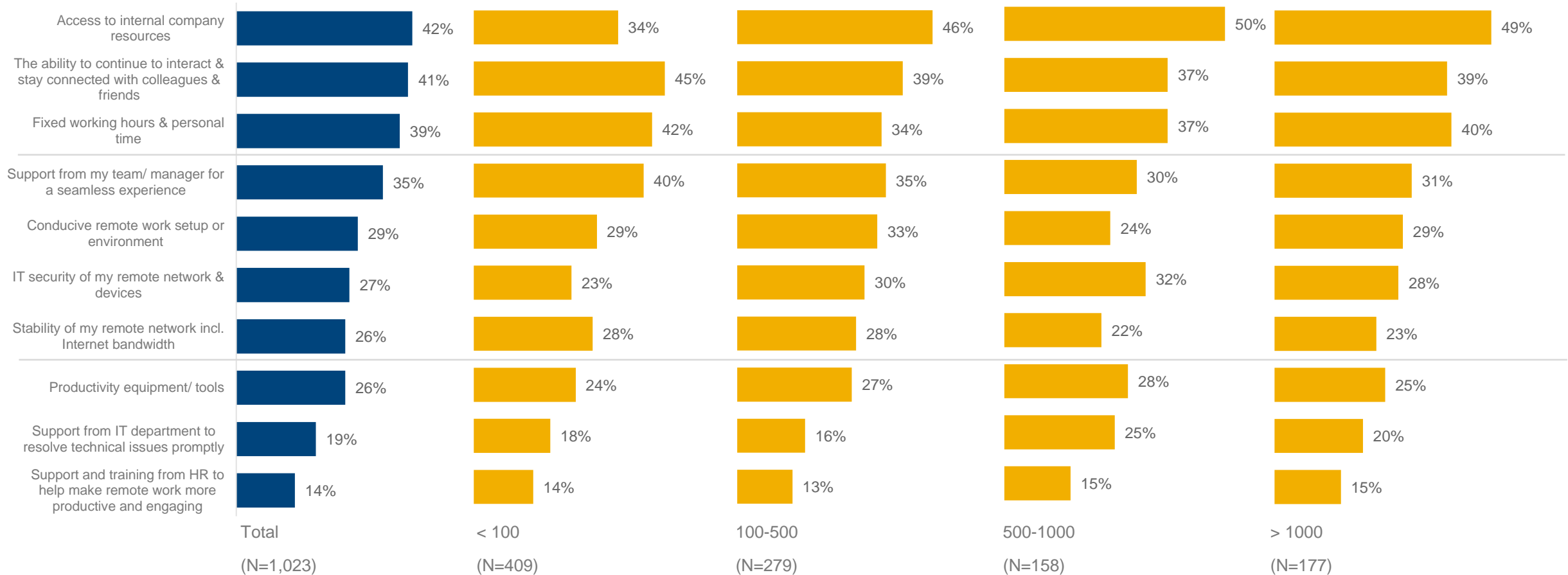
Gen Z: 18 to 23 years old | Millennials: 24 to 34 years old |
Gen X: 35 to 54 years old | Baby Boomers: 55 years old & above



Employees in small organisations value interaction with colleagues most

- Employees in small organisations with less than 100 employees rank the ability to continue to interact & stay connected with colleagues and friends (45%) as the most important factor for remote working, while others rate access to internal company resources as the top priority.
- Employees in small organisations with less than 100 employees feel most strongly about having fixed working hours & personal time, as well as getting support from their team/ manager to ensure a seamless experience.

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.

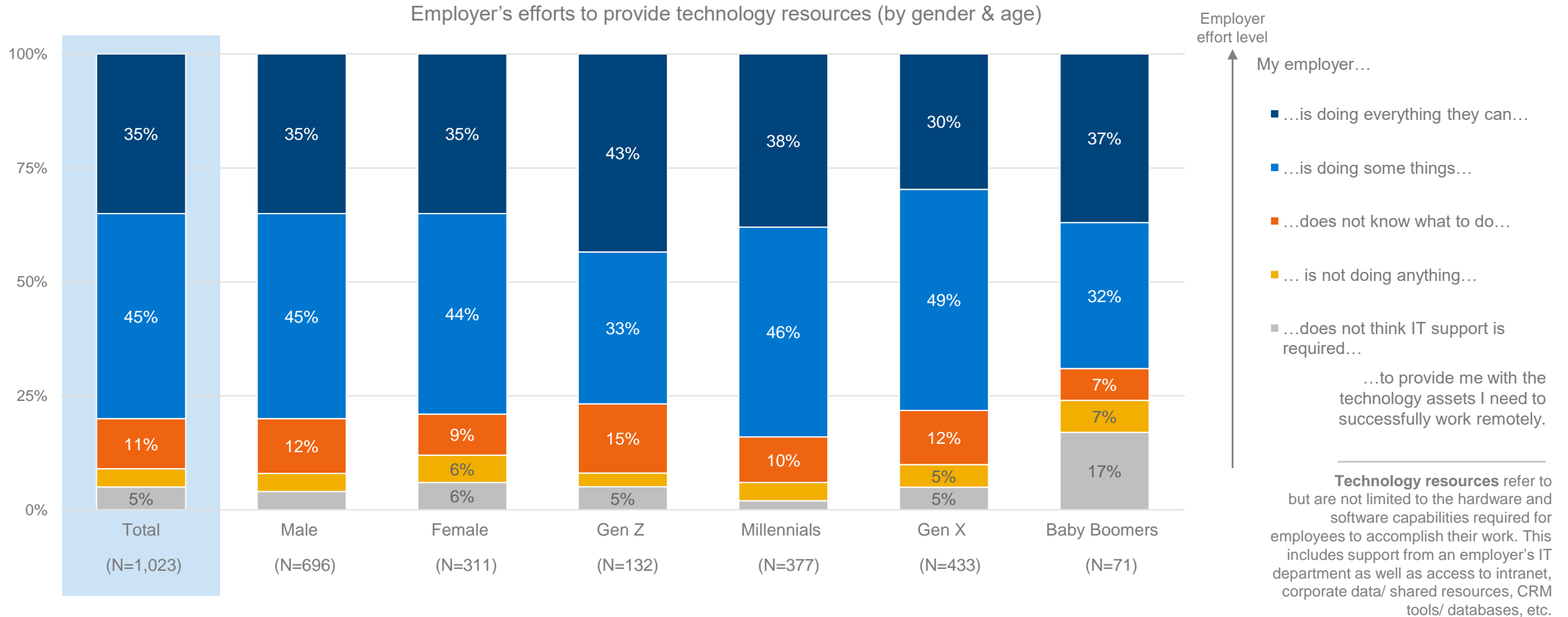


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More than six in 10 feel that their employer is not doing enough to provide the necessary technology resources

- Only 35% feel their employer is doing everything they can to provide the necessary technology resources to successfully work remotely.
- Among the various age groups, more Gen Z employees (43%) feel that their employer is doing everything they can to provide the technology resources required to work remotely.
- 31% of Baby Boomers feel that their employer does not know what to do, is not doing anything or does not think IT support is required to successfully work remotely.

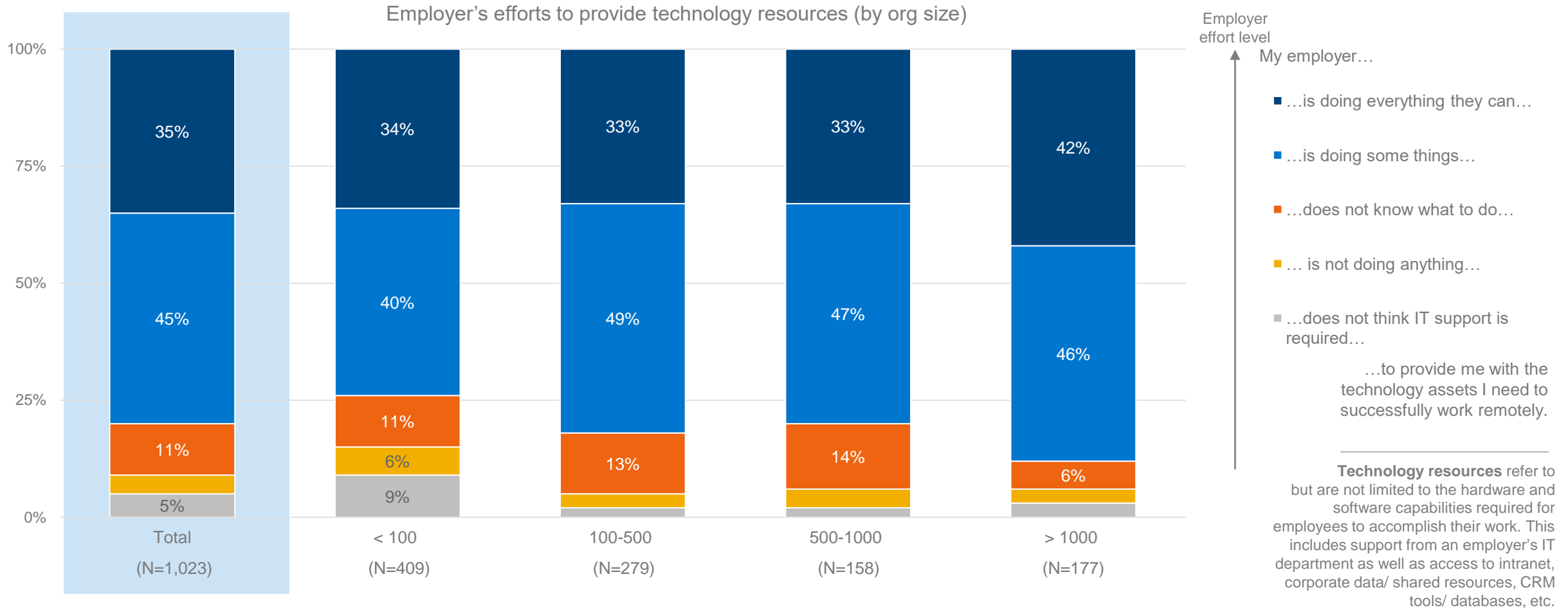


Q3. Thinking about technology resources to successfully work remotely, how would you describe your employer's efforts to provide them?

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

More employees in large organisations feel their employer is doing everything they can to provide the necessary technology resources to successfully work remotely

- 42% of employees in large organisations with more than 1,000 employees feel that their employer is doing everything they can to provide the necessary technology resources for successful remote work, the highest among organisations of all sizes.
- More employees in small organisations with less than 100 employees feel that their employer does not know what to do (11%) or is not doing anything (6%) to provide them with the technology resources needed for successful remote work. 9% of employees also feel that their employer does not think IT support is required for remote working, the highest among organisations of all sizes.

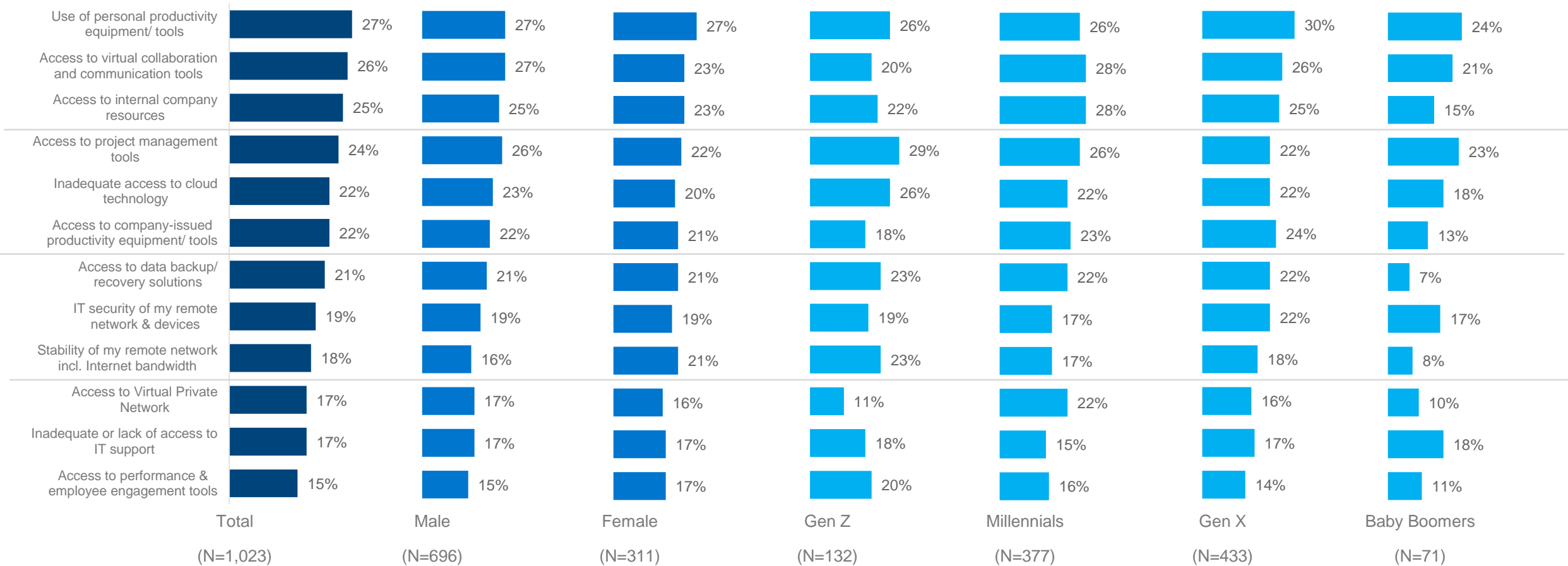


Q3. Thinking about technology resources to successfully work remotely, how would you describe your employer's efforts to provide them?

Top three tech challenges are use of personal productivity equipment for work, access to virtual collaboration & communication tools and access to internal company resources

- Use of personal productivity equipment/ tools is the top tech challenge faced by employees while remote working during social distancing.
- Among the various age segments, more Gen Z employees see access to performance & employee engagement tools as an obstacle (20%). Gen Z employees also find the instability of their remote network, including Internet bandwidth (23%), particularly challenging.
- Among the various age groups, more Millennials struggled with access to Virtual Private Network (VPN) (22%).

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



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

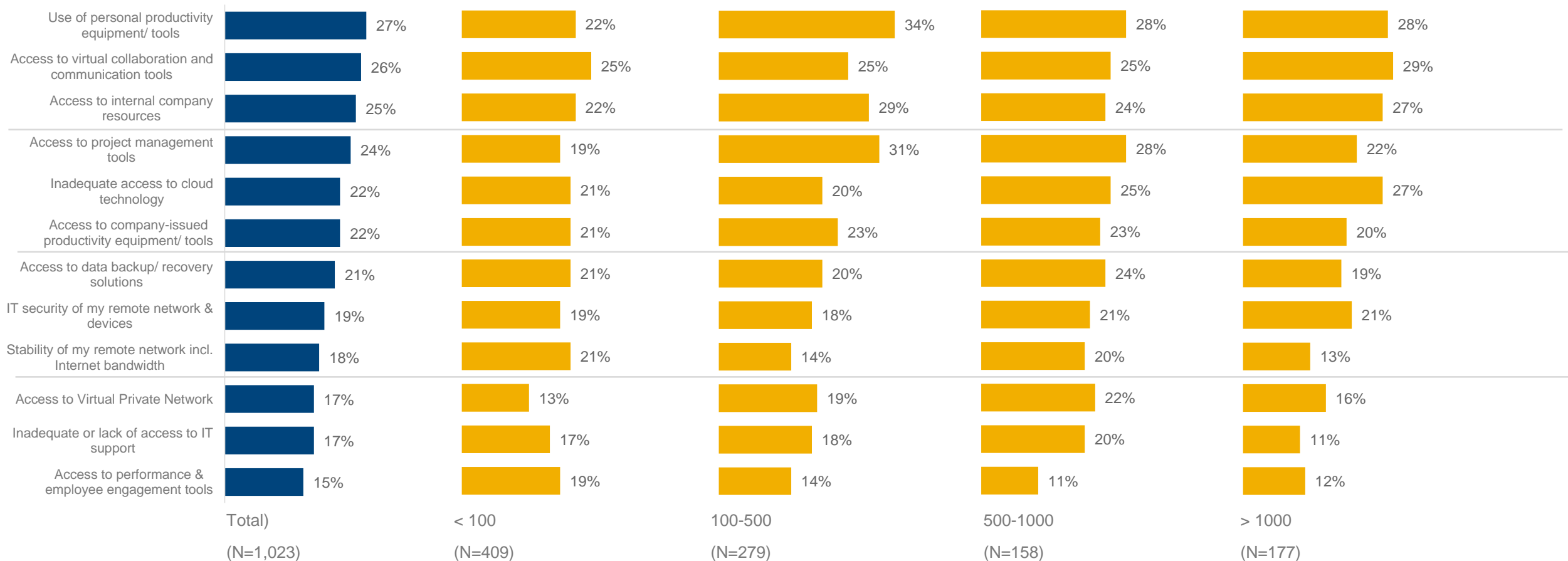
Gen Z: 18 to 23 years old | Millennials: 24 to 34 years old | Gen X: 35 to 54 years old | Baby Boomers: 55 years old & above



Use of personal productivity equipment consistently ranked in the top three tech challenges faced by employees across organisations of all sizes

- More employees from small to mid-sized organisations with 100 to 500 employees faced issues with needing to use of personal productivity equipment/ tools for work (34%), the highest among organisations of all sizes. Among organisations of all sizes, more employees from large organisations with more than 1,000 employees struggled with inadequate access to cloud technology (27%) and virtual collaboration and communication tools (29%).

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

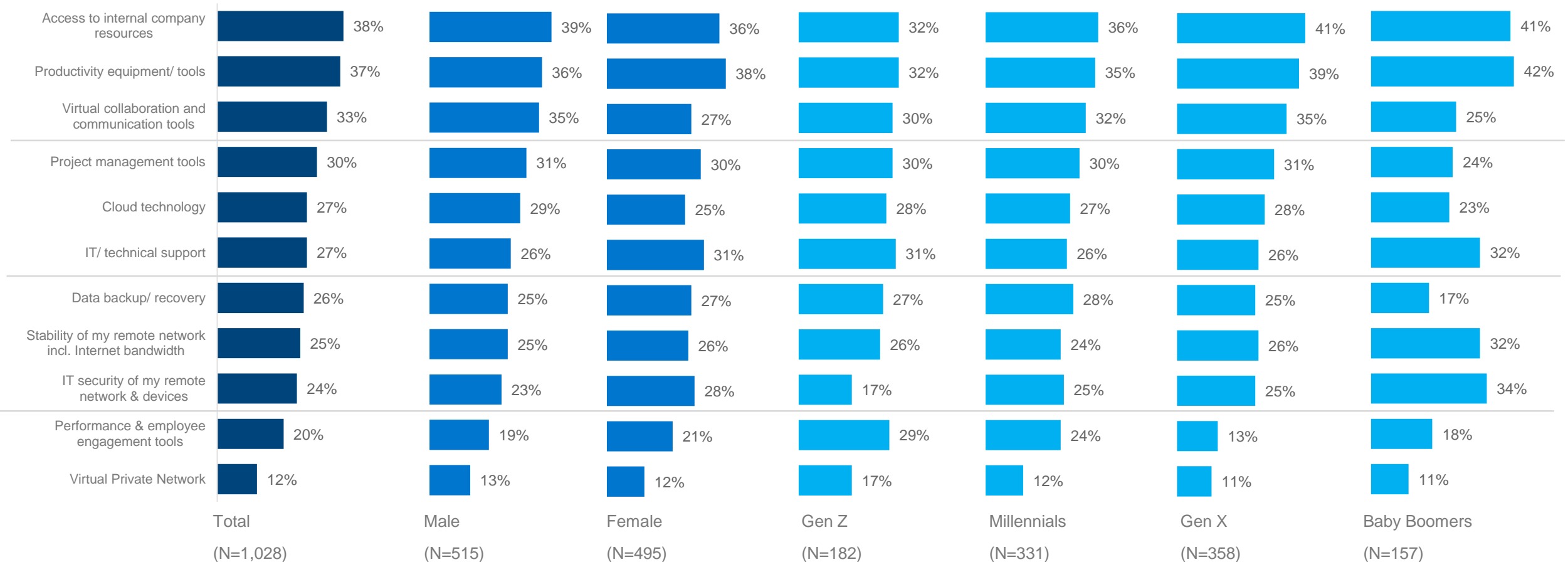


Q5. Thinking about remote work during the period of social distancing, please select the top 3 technology challenges that you faced.

Access to internal company resources and productivity equipment & tools are the top tech resources employees need for long-term remote work

- The top three tech resources that employees want their employer to provide for long-term remote work are 1) access to internal company resources (38%); 2) productivity equipment/ tools (37%); and 3) virtual collaboration & communication tools (33%).
- Among the various age segments, fewer Gen Z employees view IT security of their network and devices as a priority (only 17%), signalling a need for organisations to educate their workforce on the importance of end users' role in IT security.

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.

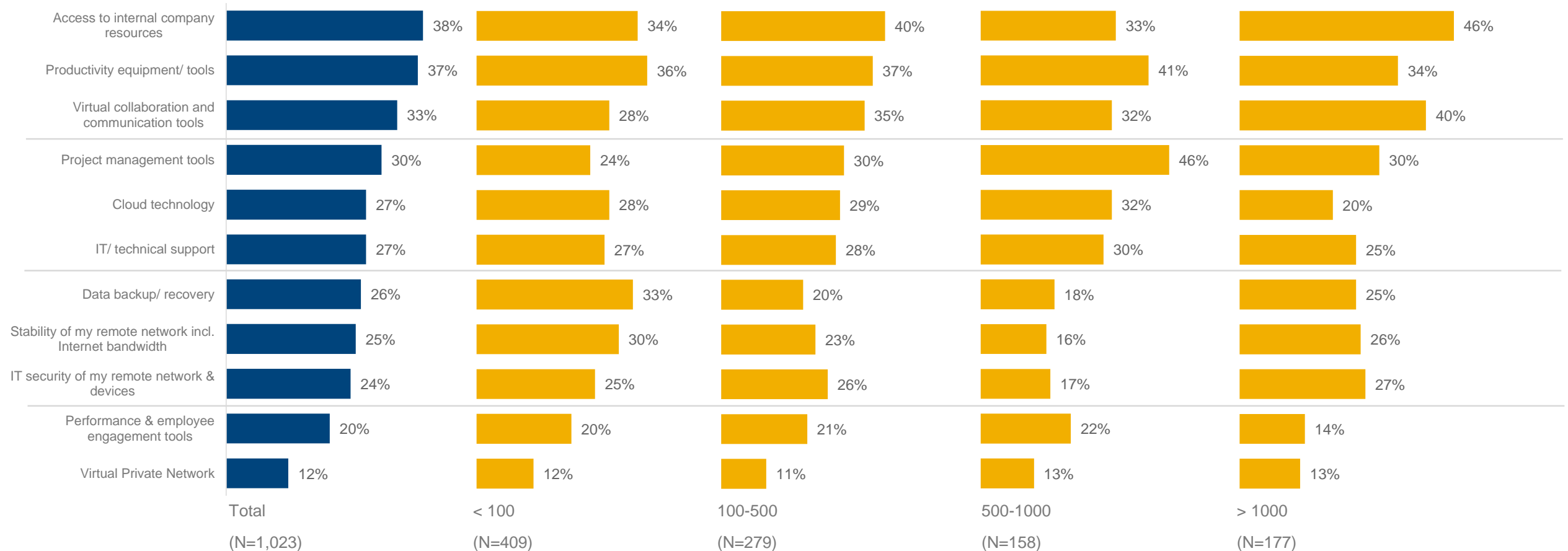
Gen Z: 18 to 23 years old | Millennials: 24 to 34 years old | Gen X: 35 to 54 years old | Baby Boomers: 55 years old & above



Across organisations of all size, employees consistently ranked access to internal company resources and productivity equipment/ tools as top tech resources employers must provide

- More employees in large organisations with more than 1,000 employees seek better access to internal company resources (46%) and virtual collaboration & communication tools (40%).
- More employees in mid-sized organisations with 500 to 1,000 employees rank project management tools as the most desired tech resource (46%).

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.

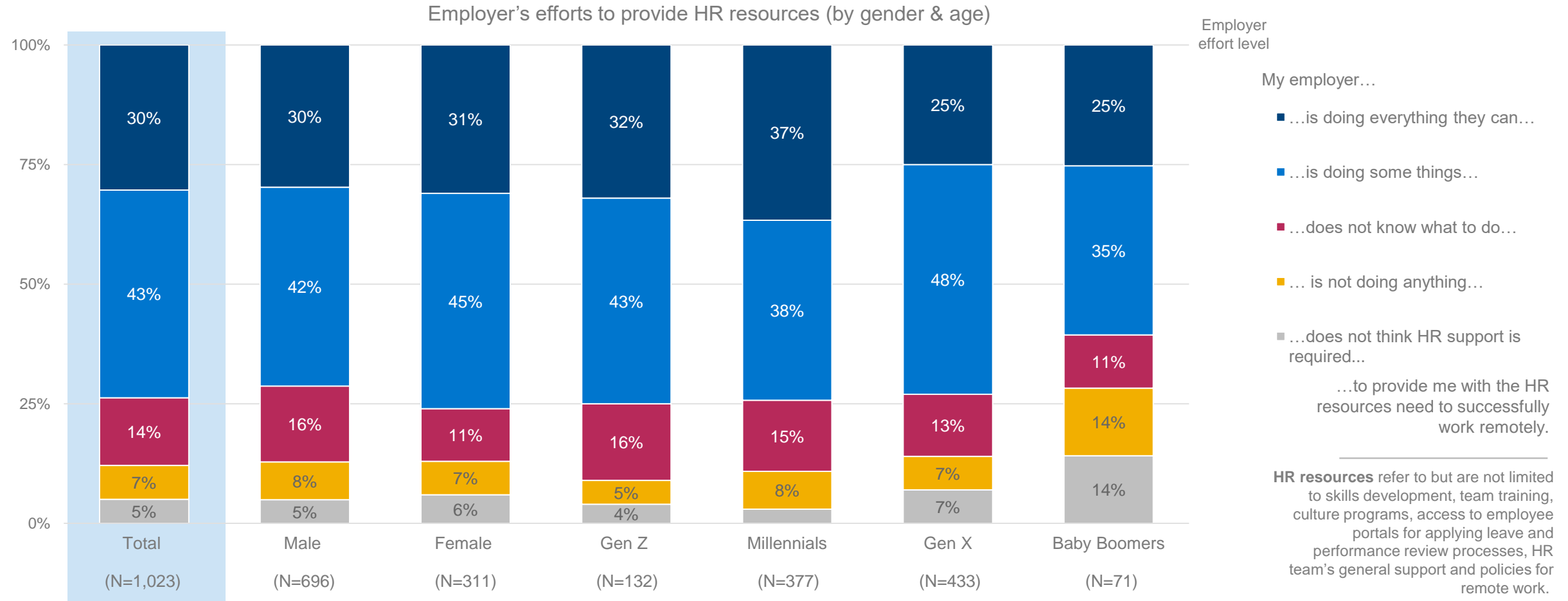


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Only 30% of employees feel that their employer is doing everything they can to provide the necessary HR resources to work remotely successfully

- More Millennials (37%) feel that their employer is doing everything they can to provide them with the necessary HR resources required to work remotely successfully.
- Among the various age segments, more Baby Boomers (28%) feel that their employer is not doing anything to provide the necessary HR resources or does not think HR support is required.

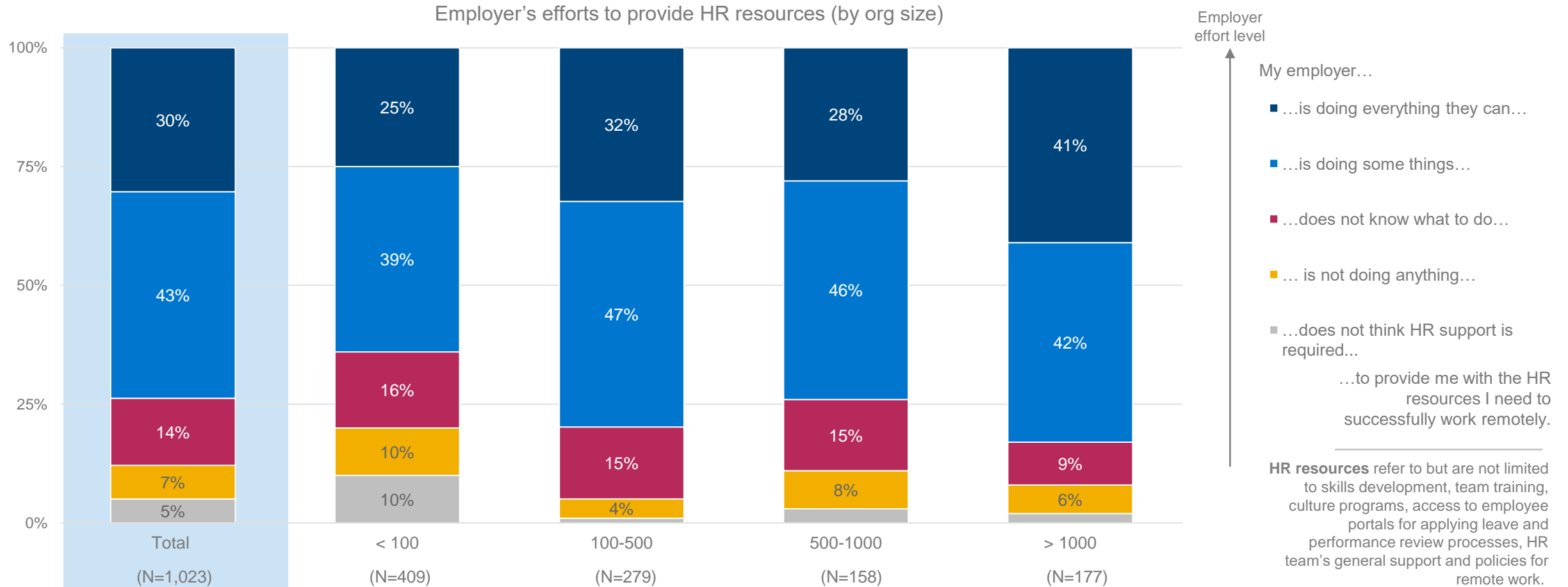


Q4. Thinking about HR resources to successfully work remotely, how would you describe your employer's efforts to provide them?

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 the HR resources required to work remotely successfully

- More employees in large organisations with more than 1,000 employees (41%) feel that their employer is doing everything they can to provide the necessary HR resources to successfully work remotely.
- Only one in four employees in small organisations with less than 100 employees feel their employer is doing everything they can to provide the HR resources required for them to successfully work remotely.

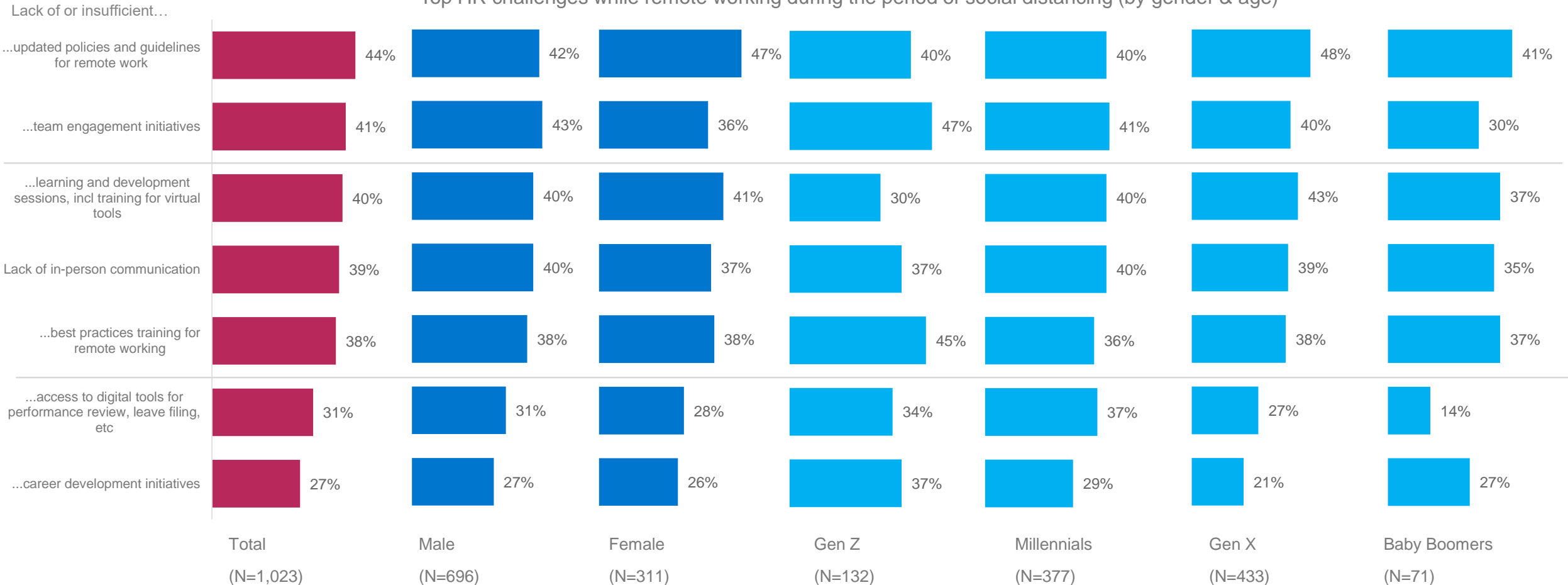


Q4. Thinking about HR resources to successfully work remotely, how would you describe your employer's efforts to provide them?

Outdated policies and guidelines is one of the top HR challenges for employees while remote working

- Generally, the top three HR challenges faced by employees while remote working are 1) lack of updated policies and guidelines for remote work (44%); 2) lack of team engagement initiatives (41%); and 3) lack of learning & development sessions, including training for virtual tools (40%).
- Across age groups, Gen Z employees find the lack of team engagement initiatives (47%) and best practice training for remote working (45%) especially challenging.

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



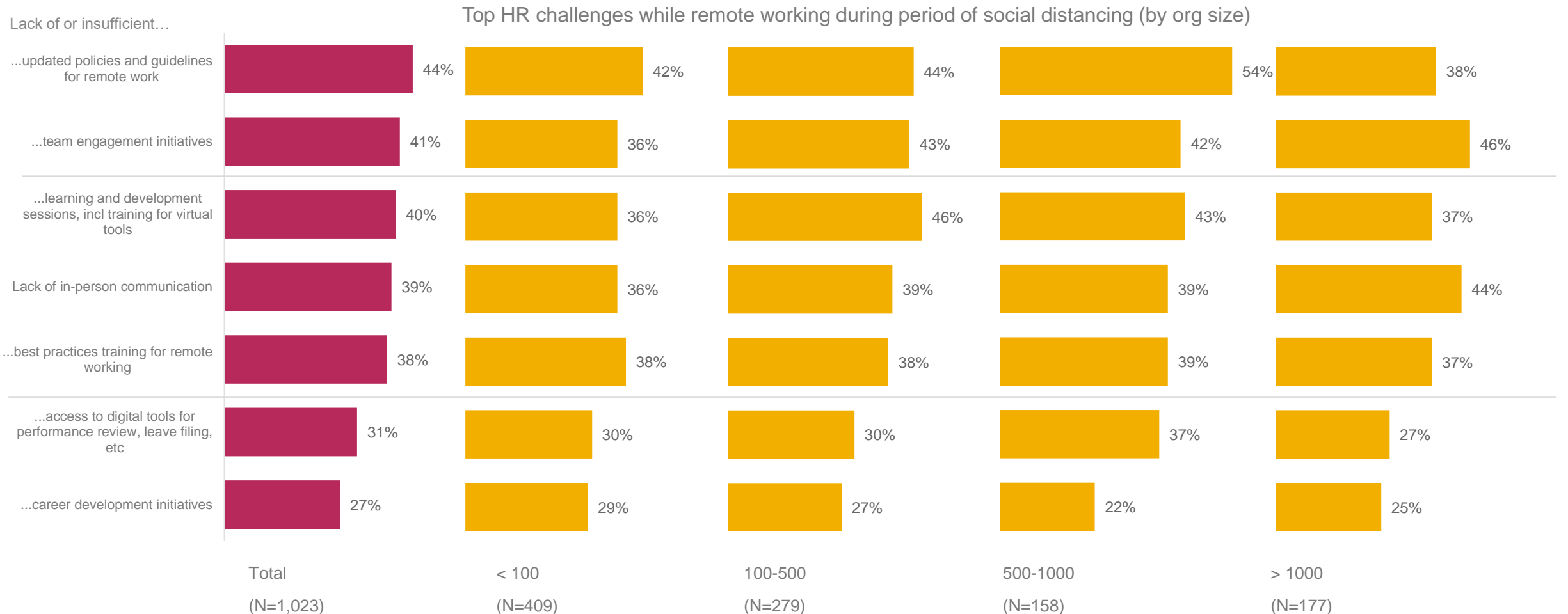
Q7. Thinking about remote work during the period of social distancing, please select the top 3 HR challenges that you faced.

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



Outdated policies and guidelines for remote working consistently ranked in the top three HR challenges faced by employees across organisations of all sizes

- Employees in large organisations (>1,000 employees) are most affected by the lack of team engagement initiatives (46%) and lack of in-person communication (44%) while remote working.
- Significantly more employees in mid-sized to large organisations with 500 to 1,000 employees find the lack of updated policies and guidelines for remote working to be a key HR challenge (54%).

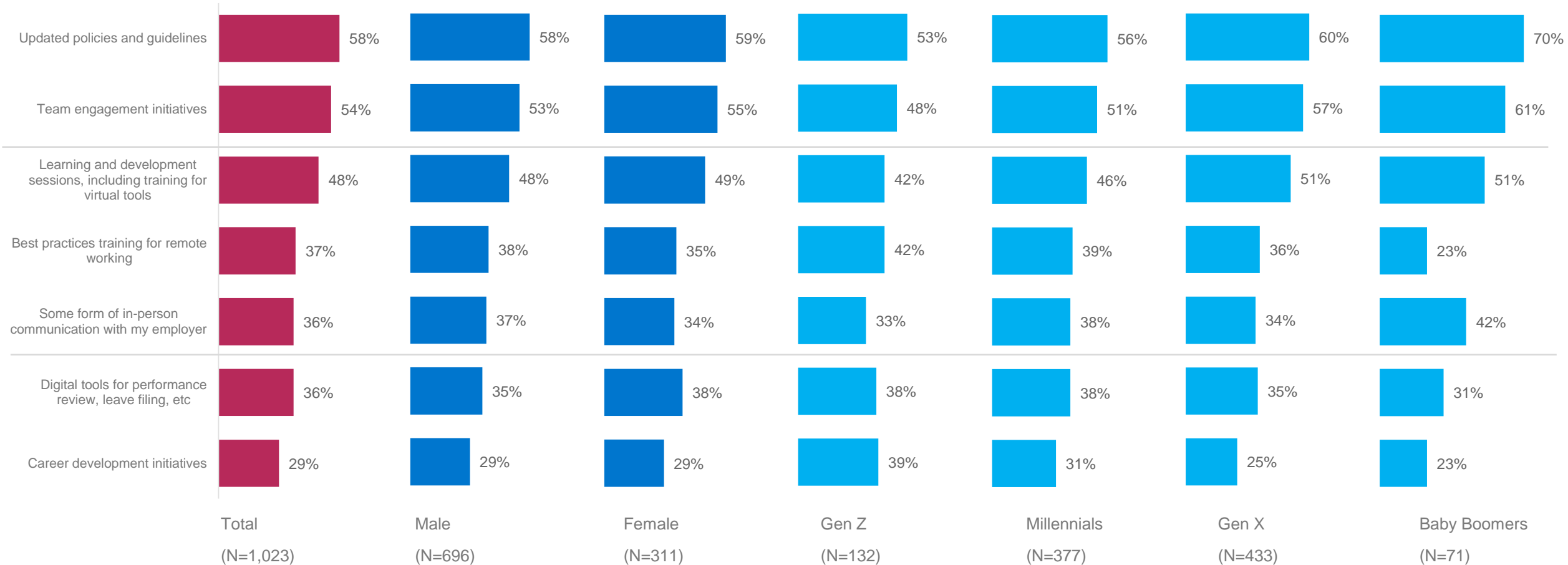


Q7. Thinking about remote work during the period of social distancing, please select the top 3 HR challenges that you faced.

Employers must update their policies and guidelines for long-term remote working

- The top three HR resources and support that employees need for long-term remote work are 1) updated policies and guidelines (58%); 2) team engagement initiatives (54%); and 3) learning and development sessions, including training for virtual tools (48%).
- Among the various age segments, more Gen Z employees value best practice training for remote working, including support for mental well-being (42%), and career development initiatives (39%).
- More Baby Boomers want their employer to provide updated policies and guidelines for remote working (70%) and some form of in-person communication (42%), the highest across the various age groups.

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.

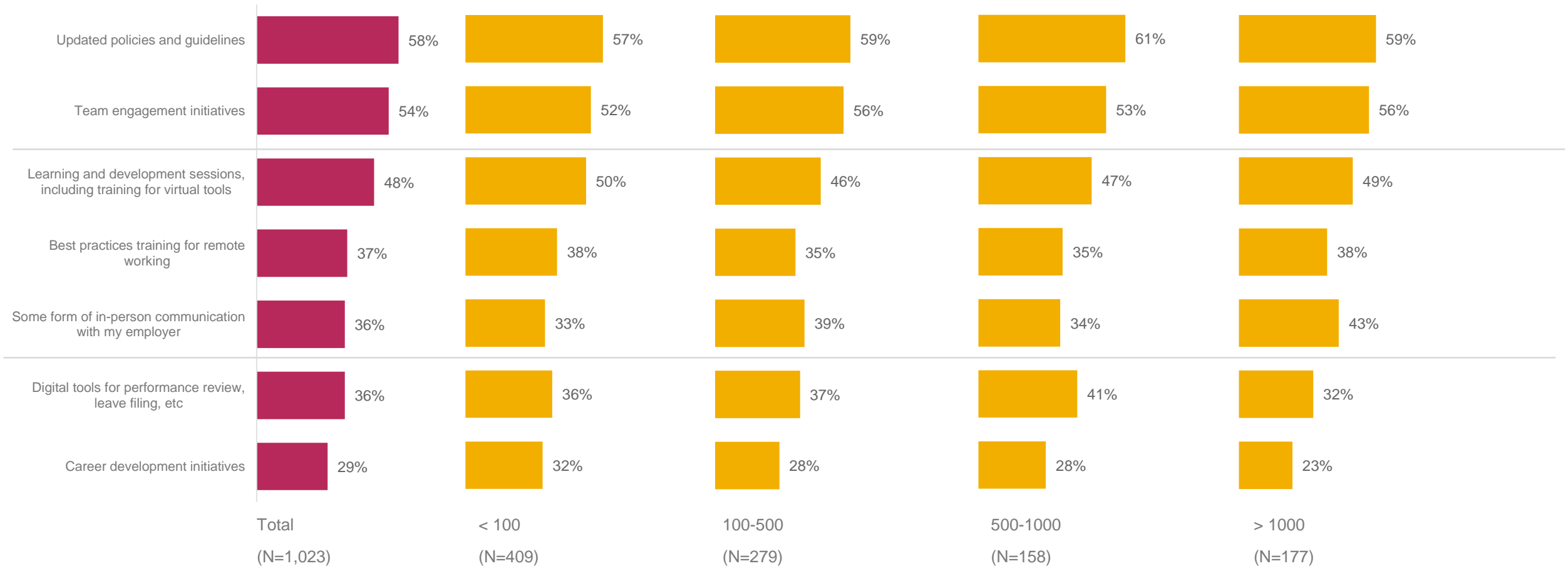
Gen Z: 18 to 23 years old | Millennials: 24 to 34 years old | Gen X: 35 to 54 years old | Baby Boomers: 55 years old & above



Updated policies and guidelines consistently ranked as the most important HR support desired by employees across organisations of all sizes

- More employees in large organisations (>1,000 employees) also want their employer to provide some form of in-person communication (43%).

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.



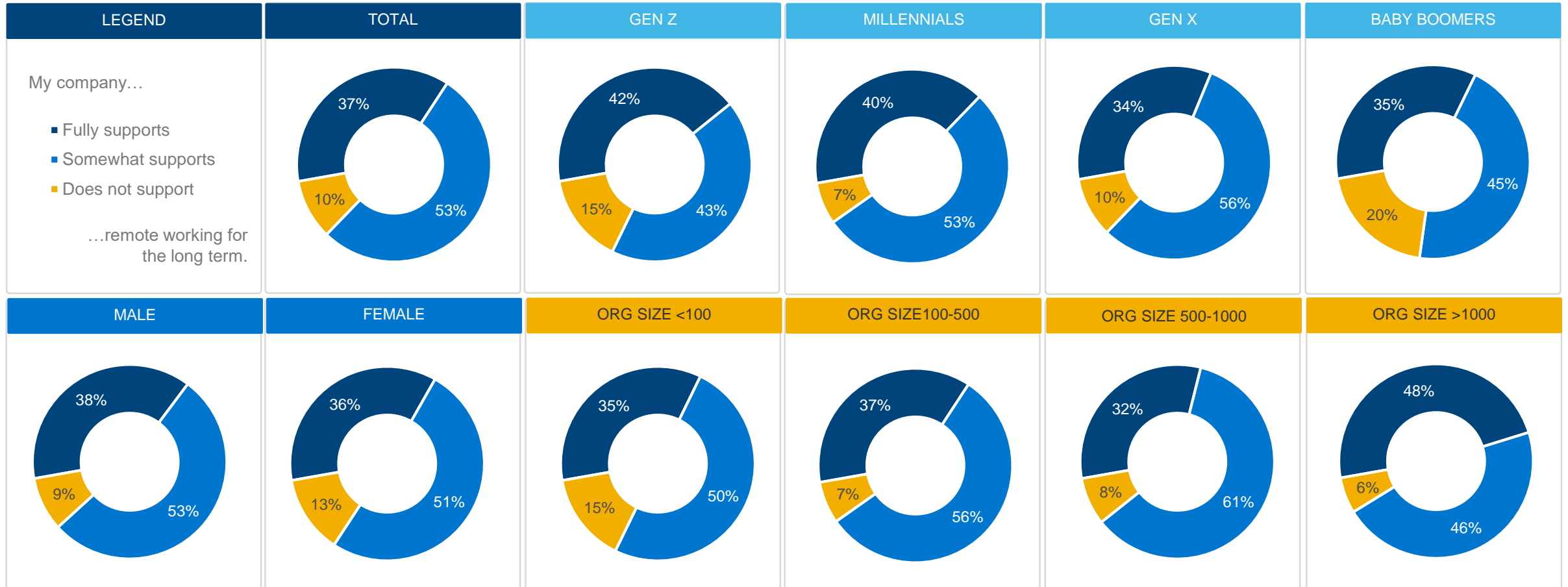
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Only 37% feel that their company fully supports long-term remote work

- Employees in large organisations with more than 1,000 employees are most confident that their employer fully supports remote working for the long term (48%).
- Employees in small organisations of less than 100 employees are less optimistic about their employer's support for long-term remote work, with 15% saying that their company does not support it at all.
- More Gen Z (42%) and Millennials (40%) feel that their employer fully supports remote working for the long term compared to other age groups. While significantly more Baby Boomers (20%) feel that their company does not support it at all.

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



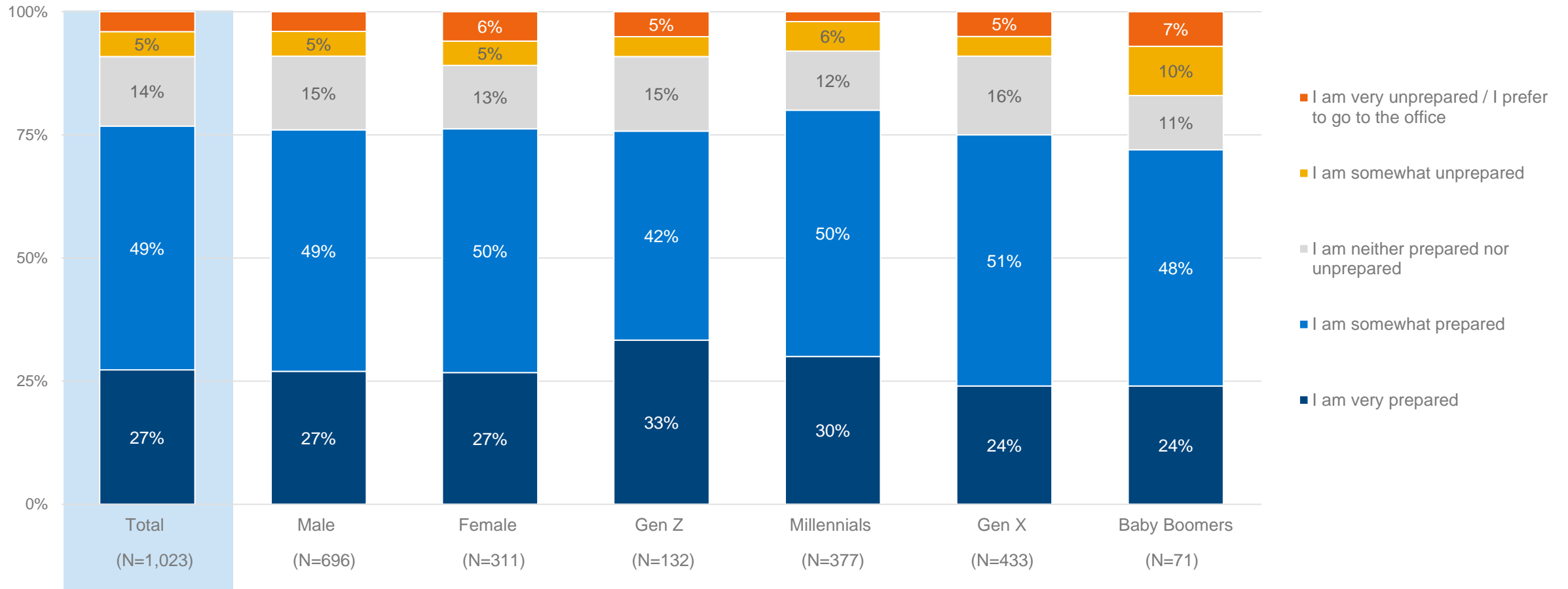
Q9. To what extent do you think your company supports remote work for the long term?

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

More than seven in 10 employees feel prepared to work remotely for the long term

- 27% of employees feel that they are very prepared to work remotely for the long term after experiencing remote work during the period of social distancing.
- More Gen Z (33%) and Millennials (30%) feel prepared to work remotely for the long term compared to Gen X (24%) and Baby Boomers (24%).
- Baby Boomers account for the highest percentage of employees who feel unsure or unprepared for long-term remote work or prefer to go to the office (28%).

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



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

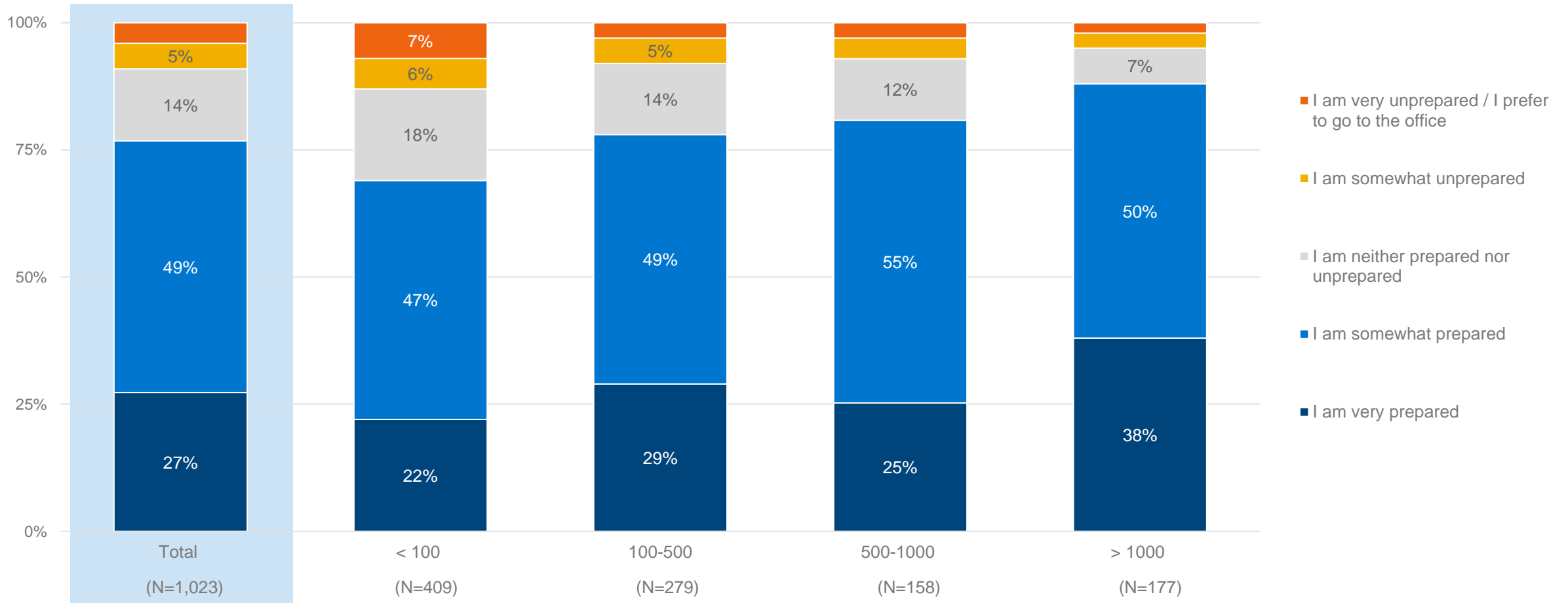
Gen Z: 18 to 23 years old | Millennials: 24 to 34 years old | Gen X: 35 to 54 years old | Baby Boomers: 55 years old & above



Employees in large organisations are more prepared for long-term remote work

- Almost nine in 10 employees (88%) from large organisations with more than 1,000 employees feel that they are prepared for long-term remote work.
- Employees in small organisations with less than 100 employees are most uncertain about their preparedness to work remotely for the long term, with 31% indicating they are neither prepared nor unprepared, somewhat or very unprepared to work remotely for the long term, or otherwise prefer to go to the office.

Preparedness for long-term remote working (by org size)

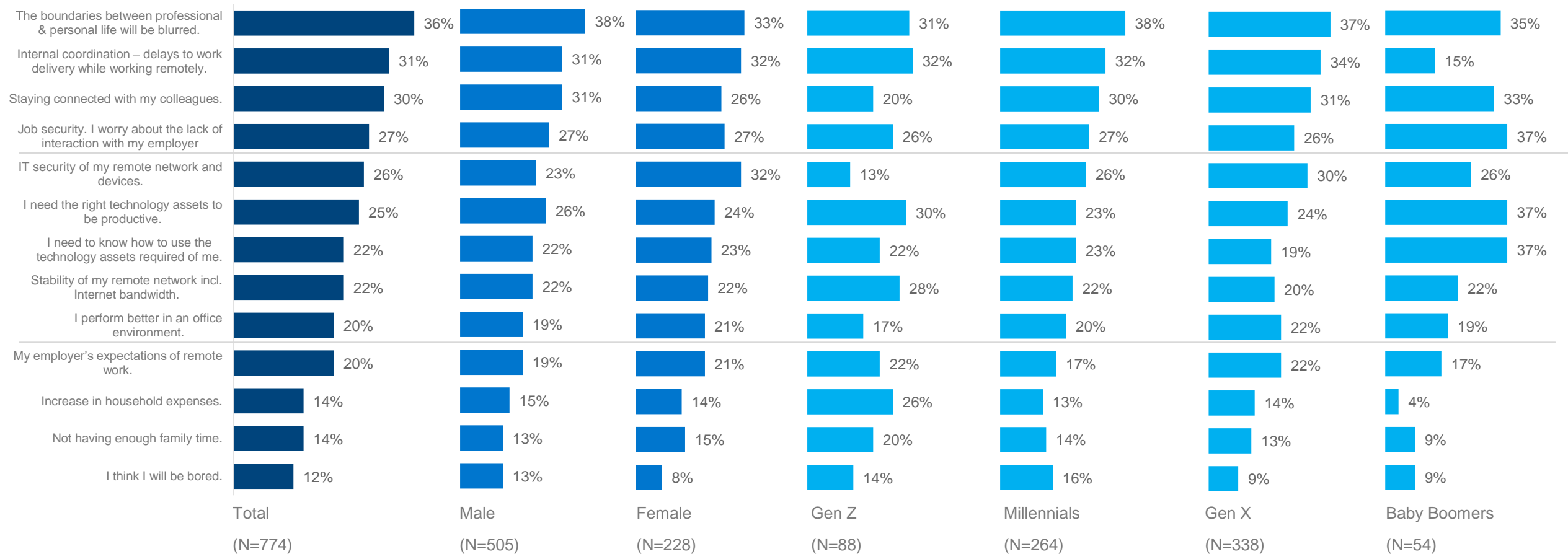


Q10A. Having experienced remote work during the period of social distancing, rate how prepared you are to work remotely for the long term?

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

- Male employees (38%) are more concerned about the blurring boundaries between professional and personal lives compared to female employees (33%). Female employees (32%) are significantly more concerned about IT security of their remote network and devices compared to their male counterparts (23%).
- Baby Boomers are very concerned about job security due to the lack of interaction with their employer (37%), the need for the right technology assets to be productive (37%) and the know-how of these technology assets (37%).

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

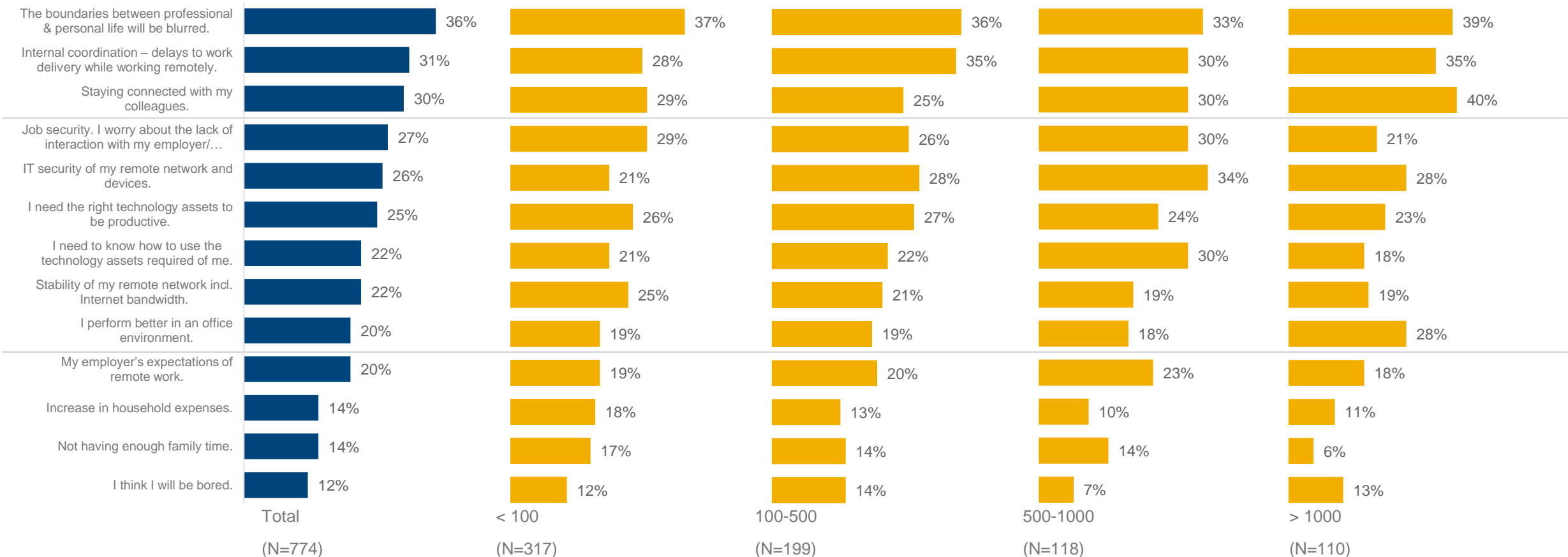
Gen Z: 18 to 23 years old | Millennials: 24 to 34 years old |
Gen X: 35 to 54 years old | Baby Boomers: 55 years old & above



Employees in large organisations are most concerned about staying connected with their colleagues and the blurring boundaries between professional and personal lives

- Employees in large organisations (>1,000 employees), compared to other organisational sizes, are significantly more concerned about maintaining connection with their colleagues (40%) and feel that they perform better in an office environment (28%).
- Employees in mid-sized to large organisations (500 to 1,000 employees) are most concerned about the IT security of their remote network and devices (34%), and the need to have the know-how to use the technology assets required to be productive (30%) compared to their counterparts across organisations of different sizes.

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

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