

Lenovo™



Diversity + Inclusion in the Global Workplace

Topline Findings



“**Inclusion** to me means that **everyone gets along** and has the **opportunity to be accepted** and to **be themselves**. We **need more inclusion** in today’s society.”

- Female, 20, US



Table of Contents

- 1. Research Objectives + Methodology**
- 2. Key Findings**
- 3. New Workplace Norms**
- 4. D&I: An Emerging Expectation**
- 5. Inclusion as Empowerment**
- 6. Facilitating D&I in the Workplace**
- 7. Mentors and Resource Groups**
- 8. A Focus on Mental Health**
- 9. Technology as a Facilitator**



An Inclusive Workplace Makes People Thrive

Diversity and Inclusion (D&I) has undergone a seismic shift; one that is holistic, expansive, and delivers on a fundamental human need to be accepted, supported and valued.

In brief: to belong.

We learned through this research that the workplace is today's modern laboratory for D&I, where people now **expect** the place where they choose to work to conform to *them*, not the other way around. They are asking more from the workplace and aligning themselves with companies that reflect their own personal values. Purpose is also a critical marker of D&I— employees want to see it at the center of their employers' business practices.

D&I is not only about ticking demographic boxes or living solely as an HR function. It now requires policies and processes hardwired into the workplace culture that eliminate bias and foster genuine inclusion – where *all groups* can belong and thrive. And it will demand that D&I works its way through the entire organization, beginning in the C-Suite and permeating throughout every level of the workplace culture. Employees want companies to put D&I at the center of the hiring and recruitment process, as well as to provide the resources and support that enable people of all backgrounds to thrive on the job and rise through the ranks.

There is a major opportunity for companies that embrace this new paradigm. In this study, employees indicate that diverse and inclusive workplaces allow them to feel a greater sense of belonging, stay more engaged with their work, and feel more loyal to their employers. And there are potential consequences for companies that fall behind, with a majority of respondents in this study saying that they consider a prospective employer's D&I policies when deciding where to work.

Research Objectives

Our Mission

We conducted a comprehensive research study in five markets to understand the perceptions, gaps, wants, and needs of **employees** across all generations when it comes to Diversity and Inclusion (D&I) in the workplace—as well as the critical role technology will play. This thought leadership initiative serves as a follow-up to Lenovo's 2018 Diversity & Inclusion study, which identified the greater focus on inclusion over diversity among the general population in the same five markets and examined the differences in how respondents defined inclusion across generations and geographies.

These findings will further position Lenovo and Intel as authorities and **leaders in this space**. The study will also allow the companies to re-evaluate their own practices to stay at the forefront of corporate D&I and ensure they are meeting the needs of current and future generations entering the workforce.

Methodology Overview

Who		How many	When	What	How	Margin of Error
	United States	$n = 1,054$	December 19, 2019 – January 7, 2020	D&I in the Global Workplace	Online Survey	MOE of +/- 3 percentage points per country – 95% confidence level
	United Kingdom	$n = 1,007$				
	Germany	$n = 1,011$				
	Brazil	$n = 1,012$				
	China	$n = 1,012$				

More details on methodology in the appendix.

Key Findings: The Evolution of D&I in the Workplace

In this research, we have uncovered a few trends integral to the evolution of workplace D&I in recent years...

- 1 Today, people expect the workplace to work for them, not the other way around.

People increasingly want, and expect, the workplace to conform to their needs, their values, and their lifestyles – allowing them to seamlessly integrate their work with the rest of their lives. It's about putting people and teams at the center of what a company does, not the other way around.
- 2 People are defining “inclusion” in a more holistic, comprehensive and actionable way.

For people, an inclusive culture has gone far beyond checking demographic boxes when considering new talent. It is about enabling people of all backgrounds, ethnicities, orientations, and levels to contribute and to be appreciated.
- 3 Inclusive workplaces allow people to give their best.

In an inclusive culture, all people feel they can thrive – resulting in employees that are more engaged, more productive, and more loyal.
- 4 Technology has a critical role to play—as long as no one is left behind.

Technology can be the vital facilitator of workplace D&I, but concerns persist about who could be left behind.

Key Findings: In Detail

1 Employees today expect the workplace to work *for them*, not the other way around. ***People increasingly assume the workplace will conform to them, mirroring their values and allowing them to bring their whole selves to work***

- How a company treats its employees has become synonymous with its brand purpose.
- The workplace is the #1 sector of society where respondents believe D&I is critically important - alongside schools and universities.
- In many markets, employees are prioritizing factors like work-life balance, indicating it is just as important - if not more so - than salary and benefits; similarly, they value paid time off and how engaging their work is.
- Employees now consider a company's D&I policies and performance when deciding whether to accept a job.
- Despite this, the majority of respondents feel their workplace lags behind in diversity.
- At the end of the day, employees want their employers to treat them like human beings with complex needs and lives outside of work.

People are redefining inclusion as multi-dimensional, higher order, and actionable.

Employees view inclusion as more than checking demographic boxes or fulfilling outdated quotas.

- ## 2
- Inclusion is defined broadly and is deeply personal. It is about representation of people of different genders or ethnicities, but it is also about creating an environment where intellectual diversity flourishes, where disabilities are accommodated, where employees of all backgrounds can find mentors and allies, and where mental health is taken seriously as a critical aspect of wellbeing.
 - Inclusion done right eliminates biases and allows teams to feel accepted, supported and valued. Ultimately, this gives them a sense of belonging, a vital human need and a rising value in the last two years.
 - Mental health is of critical importance with increasing numbers of diagnosed, and undiagnosed cases, as well as higher levels of anxiety than in previous generations. People want their workplaces to support total wellbeing with mental health and “psychological safety” being a critical aspect.

Key Findings: In Detail, Continued

- 3 Inclusive workplaces support employees' personal, long-term career ambitions.
Cultivating inclusion in the workplace empowers employees to thrive and make big contributions.
- In genuinely diverse and inclusive cultures, people are more motivated to engage, contribute, take risks, and to give their loyalty to a company.
 - Workplace inclusion embraces often marginalized groups so that they can participate equally.
 - Employees today applaud the ways that technology has enabled people of varied backgrounds to thrive at work, by allowing for more flexible work patterns, enabling cross-cultural communication, and providing assistive technology to aid those with disabilities.

- Technology has the potential to get us from where we are now to where we strive to be in workplace inclusion.
Technology can be the vital facilitator of workplace D&I, but concerns persist about who could be left behind.
- 4
- Technology already enables the ability to work in more dynamic, flexible ways, especially in emerging markets, with employees in Brazil and China valuing the ability to collaborate with co-workers across various markets as the #1 benefit of tech in the workplace.
 - People recognize how technology improves employees' communication beyond cultural or language barriers, expands digital access to crucial training programs, and makes careers more accessible to people with disabilities.
 - Artificial Intelligence (AI) is bound to play an important role in the advancement of D&I and those in emerging markets (Brazil and China) are most excited about its positive potential.
 - There continues to be concern about who technology could leave behind by inadvertently eliminating the voices of marginalized or underrepresented communities.

Why This Research Matters More Now

D&I becomes even more imperative now with a workforce that, for the first time, spans four generations, each bringing their unique experiences and needs to the table. This unprecedented dynamic is enabling diverse populations to collaborate, contribute and thrive in new and more expansive ways. Whereas Millennials sparked fresh debate around D&I, the youngest generations entering the workforce, Gen Z, is driving a new demand for inclusion that is even more of an active imperative – and they're influencing people inside and outside the organizations where they work.

Gen Z - our most diverse generation to-date is quite accustomed to inclusion at home, on school campuses and in their local communities, courageously calling out and standing up to injustices, including the mistreatment of typically marginalized groups. These activist citizens value their personal brand, are the leaders of 'cancel culture' and carry it through in everything they do, including where they choose to work.

Companies have heard the business case for D&I; the rewards are great, but so are the risks. Those who don't make the grade will jeopardize the chance of attracting and retaining one of the best and brightest workforces we've seen globally to-date.



NEW WORKPLACE NORMS

Employees increasingly expect the workplace to work for them

Great Expectations

Years ago, when people entered the workforce, they expected to have to conform to the norms and customs set by their employers – to respect the hierarchy, adhere to a set schedule and dress code, and keep their perspectives and opinions largely to themselves.

But employees' expectations have changed dramatically in recent years. People increasingly feel the workplace must conform to *them*, not the other way around. They want their employers to accommodate their lives outside of work, support their overall health + wellbeing, and enable employees to express themselves and be heard on matters both big and small.

This has changed the game for employers who want to attract and retain top talent.

It is no longer enough to provide a decent salary. People want to work for

companies that have a strong mission and purpose, and to be able to advance in their careers without compromising their values.






In order to feel supported and equipped to succeed in the workplace, today's employees demand more accommodating benefits, such as work-life balance, opportunities for advancement, interesting and engaging work, and **a diverse and inclusive environment** where they will feel safe, respected and valued.

And, for the first time in history, there are four generations in the workforce—putting more pressure on companies to foster environments where people from a variety of backgrounds and life stages can all work and thrive together.



What's Important at Work

When thinking about what's most important to employees at their jobs, work-life balance, vacation time / PTO, and interesting / engaging work emerge as some of the most important – even above salary in some markets. Employees also want opportunities to advance and to feel safe in the workplace.






	 US	 UK	 Germany	 Brazil	 China
1	Work-life balance	Vacation time / paid time off	Salary	Work-life balance	Salary
2	Salary	Interesting or engaging work	Work-life balance	Vacation time / paid time off	Benefits
3	Feeling safe in the workplace	Salary	Vacation time / paid time off	Opportunities for advancement	Opportunities for advancement
4	Benefits	Work-life balance	Interesting or engaging work	Benefits	Work-life balance
5	Relationship(s) with supervisor, boss	Feeling safe in the workplace	Relationship(s) with coworkers, colleagues	Salary	Interesting or engaging work
6	Interesting or engaging work	Relationship(s) with coworkers, colleagues	Feeling safe in the workplace	Feeling safe in the workplace	Feeling safe in the workplace
7	Vacation time / paid time off	Benefits	Benefits	Relationship(s) with coworkers, colleagues	Vacation time / paid time off
8	Relationship(s) with coworkers, colleagues	Flexibility with work hours, remote work	Flexibility with work hours, remote work	Relationship(s) with supervisor, boss	Relationship(s) with supervisor, boss

Thinking about your job, how important is each of the following to you? [Ranked using Top-2 Box, "Extremely" + "Very" Important]

The Satisfaction Gap

There is a distinct satisfaction gap in the modern workplace – with a significant deficit between how important employees rank various parts of their job and how satisfied they are with that part of their working lives.

Of course, salary and benefits will always be a top concern. But it is notable that in Brazil and China, opportunities for advancement are also seen as a major gap rivaling or even surpassing salary and benefits.

	 US	 UK	 Germany	 Brazil	 China
	% Diff	% Diff	% Diff	% Diff	% Diff
Salary	-29%	-22%	-21%	-22%	-33%
Benefits	-17%	-20%	-10%	-18%	-28%
Work-life balance	-16%	-16%	-14%	-15%	-19%
Opportunities for advancement	-15%	-15%	-13%	-21%	-28%
Vacation time / paid time off	-12%	-15%	-7%	-13%	-20%
Interesting or engaging work	-11%	-16%	-11%	-12%	-22%
Feeling safe in the workplace	-9%	-10%	-6%	-13%	-13%
Relationship with supervisor, boss	-9%	-12%	-6%	-12%	-16%

What Employees Need

When it comes to how companies can best support their employees in general, employees want a variety of benefits beyond salary, with **flexible hours** rising to the top in the US and Europe, and **the opportunity for sabbatical** and **reskilling/upskilling programs** ranking as #1 in China and Brazil.

In Brazil, employees would like their places of work to provide **mentorship programs**, while **policies on diversity and inclusion** made the top 5 in just two markets: the US and Brazil.

	 US	 UK	 Germany	 Brazil	 China
1	Flexible hours	Flexible hours	Flexible hours	Reskilling / upskilling programs	Offer employees the opportunity for sabbatical
2	Severance for employees affected by layoffs or other termination	Severance for employees affected by layoffs or other termination	Severance for employees affected by layoffs or other termination	Provide mentorship programs	Reskilling / upskilling programs
3	Reskilling / upskilling programs	Reskilling / upskilling programs	Reskilling / upskilling programs	Flexible hours	Severance for employees affected by layoffs or other termination
4	Company has developed a policy on diversity and inclusion	Job coaching for employees affected by layoffs or other termination	Offer free or discounted transportation to work	Offer free or discounted transportation to work	Support / offer employee resource groups
5	Ability to work remotely	Ability to work remotely	Job coaching for employees affected by layoffs or other termination	Company has developed a policy on diversity and inclusion	Flexible hours



D&I: An Emerging Expectation

What it means for employees

Inclusion: An Evolving Definition

In Lenovo's 2018 study on Diversity & Inclusion, our research demonstrated the evolution from a focus on diversity to a greater emphasis on inclusion. Checking demographic boxes is no longer enough.

In this follow-up research study, we spoke to employees in five global markets to understand how they are *defining* inclusion in their own lives today – and especially in their workplaces.

We found that these global employees are talking about D&I in new, dynamic, and deeply personal ways.

Inclusion in the workplace is defined broadly – yes, it is about representation of people of different genders, ethnicities, or orientations; but it is also about creating an environment where intellectual diversity flourishes, where those with disabilities can fully participate and thrive, where employees of all backgrounds can find mentors and allies, and where mental health is taken seriously as a core part of overall wellbeing.



D&I: Evolving Expectations

A company's diversity and inclusion policies and performance has become a significant factor in employees' decisions about where to apply for a job and where to accept a job offer.

In fact, more than half of employees across all markets say that a company's diversity and inclusion policies are "extremely" or "very" important when deciding where to apply and whether to accept an offer. This is even higher in the US, China, and Brazil. Employees today want to know that people like them can thrive and succeed in the workplace.

"Sinto muita realização de ver pessoas portadoras de deficiência ir trabalhar em seu carro adaptado, transitar com sua cadeira de rodas com facilidade e ser produtiva."

"I feel very fulfilled to see people with disabilities go to work in their adapted car, move around with their wheelchair easily and be productive."
– Male, 59, Brazil



75%



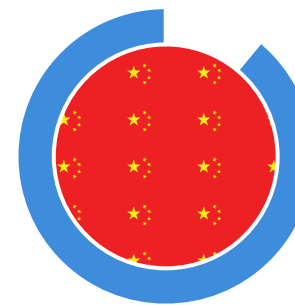
59%



52%








88%



89%

D&I: A Rising Expectation

The workplace, schools and universities, and the government consistently emerge as the top sectors of society where people feel D&I are most important. These are the sectors that people not only rely on for their livelihoods, but also for investing in and growing their future. Integrating work into the rest of their lives, employees want to be able to succeed without muting their identities or compromising their values. The professional is personal.

					
	US	UK	Germany	Brazil	China
The workplace	79%	76%	61%	92%	85%
Schools, universities	78%	75%	64%	93%	84%
The government, public sector	76%	74%	58%	91%	86%
Media, news, entertainment	74%	71%	58%	89%	83%
Within your community	73%	68%	56%	91%	76%
Within your friends	72%	67%	55%	90%	80%
With your family	68%	64%	52%	89%	85%
Within your religious community	65%	53%	45%	88%	60%






In your opinion, how important do you think diversity and inclusion are in each of the following sectors of society? [Top-2 Box, "Extremely" + "Very" Important]

The Slow March of Progress in the Workplace

Inclusion in the workplace has been a journey, and most employees acknowledge that some progress has been made – and despite expectations, there is still a long way to go.

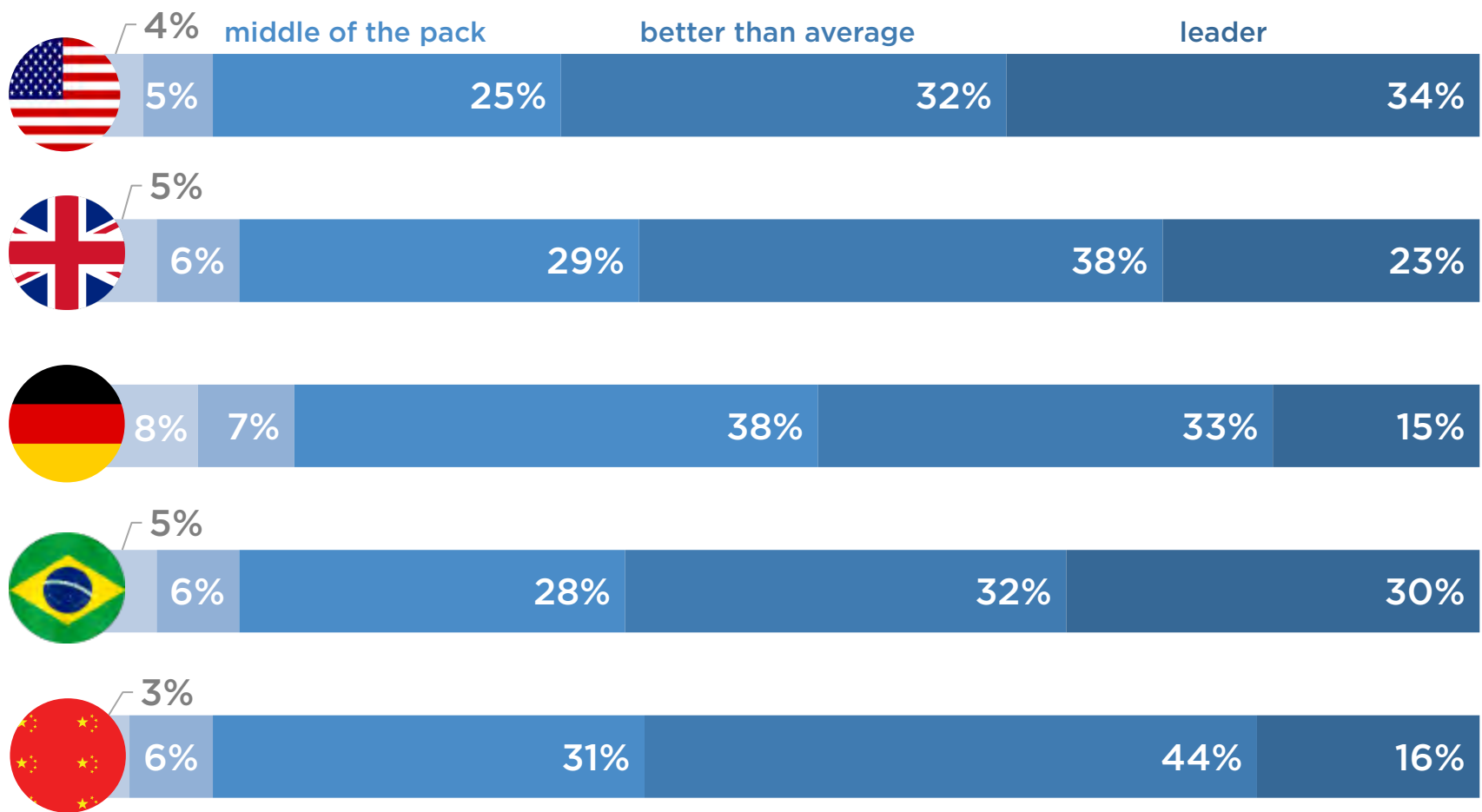
- In China and Brazil, a rapid change of pace has been observed in recent years – although there is still widespread desire for more D&I.
- Employees in Germany don't feel they're seeing change as quickly as others, with **42%** saying progress is **staying about the same**.



					
Getting better:	57%	55%	45%	71%	78%
Staying about the same:	34%	34%	42%	20%	19%
Getting worse:	9%	11%	14%	8%	3%

Where Employees Think Their Companies Stand

Amid a challenging landscape, employees generally feel their workplaces are at least “better than average” when it comes to D&I compared to other companies. But far fewer think their employers are “leaders” in this space – in China and Germany, less than one-in-five employees believe their companies are “leaders”.



- My employer is a leader
- My employer is somewhat better than average
- My employer is middle of the pack
- My employer is somewhat worse than average
- My employer is falling behind

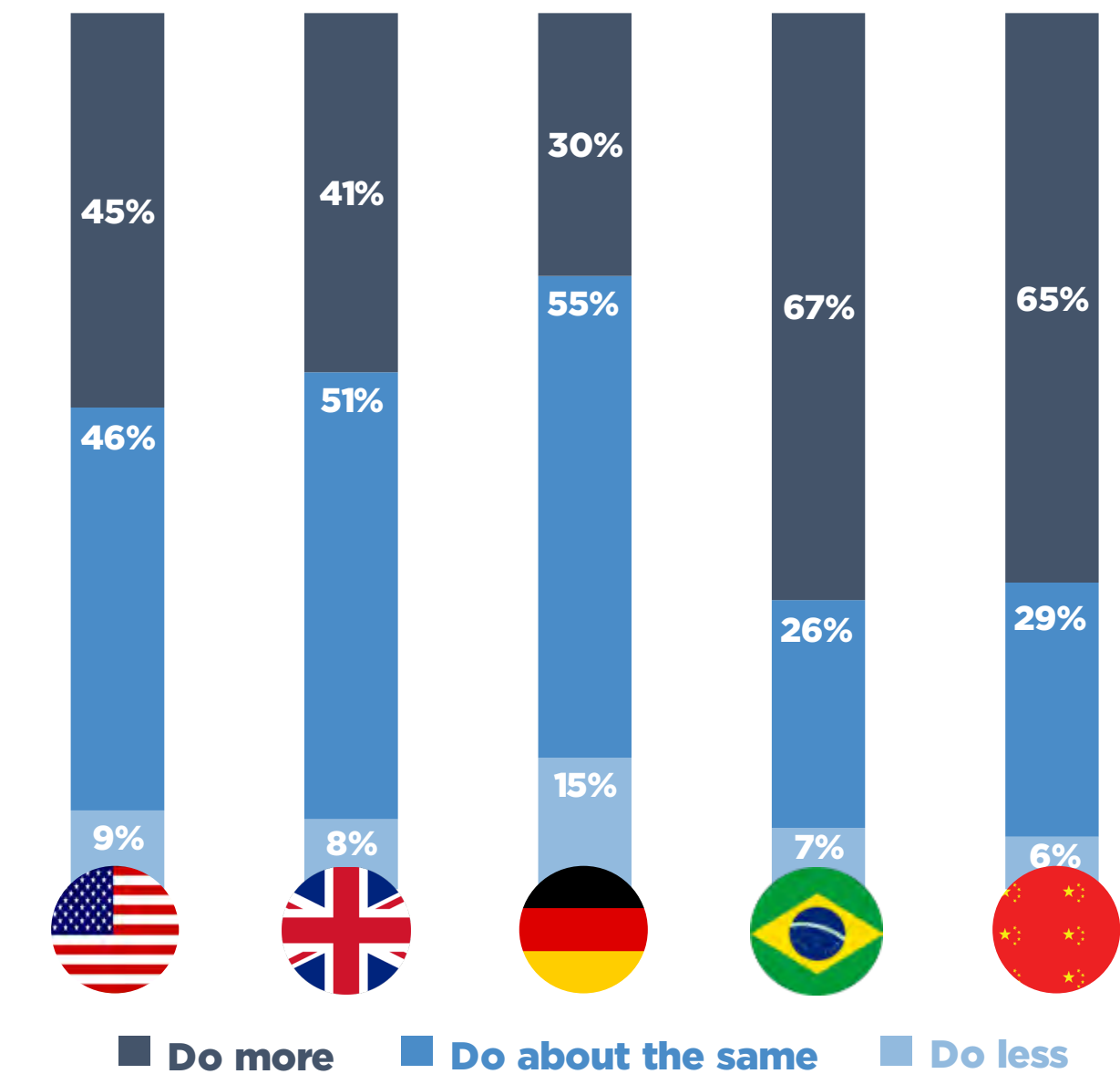
Thinking about your workplace, which of the following applies?

A Demand for Change

Many employees indicate they feel that their employers should be **doing more to proactively advance D&I**.

This is especially true in Brazil and China, where about two-thirds of people wish their employers would do more to promote D&I.

In the US, almost half of employees want to see their workplaces doing more, while 4-in-10 UK employees feel the same. German employees are more satisfied with the status quo.



Thinking about diversity and inclusion where you work, do you think your employer should be doing more or less to promote diversity and inclusion? [Top-2 Box, "5 – Should do more" + "4"; Bottom-2 Box, "1 – Should do less" + "2" on scale 1 – 5]

Employees Want Fairer Hiring Processes, Intellectual Diversity

For those who feel that their company should do *more* to promote diversity and inclusion, many are focused on the hiring process, having the workplace be more inclusive of various points of view, and having more diversity in senior roles.

What ways do you think your employer could improve diversity and inclusion in the workplace?

“Specifically, we need to attract faculty and mid to senior level managers as well as new board members to represent diverse audiences. Our student body is already well represented by multiple groups, but they need to see people like them in positions of authority.” – Male, 51, US

“Uma das formas é convidar pessoas que já trabalham com diversidade e inclusão. O importante aqui é criar um ambiente de empatia e acolhimento para o recebimento de novas e diferentes informações que a empresa e seus colaboradores não estão acostumados a ter acesso.”

“One way is to include people who already work with diversity and inclusion. The important thing here is to create an empathetic and welcoming environment to receive new and different information that the company and its employees are not used to having access to.”
– Male, 54, Brazil

“Hire people of other ethnic backgrounds and integrate more women into leadership positions.” – Female, 38, US

“Dies bei der Besetzung neuer Stellen mehr berücksichtigen und aktiv bewerben. Ausbildungsplätze speziell für Menschen mit Migrationshintergründen anbieten.”

“Take this into account when filling new positions and apply actively. Offer training places especially for people with migration backgrounds.”
– Male, 36, Germany

“Support more events nationwide, not just those that promote the company but those behind the scenes that empower and support employees.”
– Female, 24, UK

“Give people more chances to show what they are capable of regardless of experience. Invite more disadvantaged people to train.” – Female, 30, UK



INCLUSION AS EMPOWERMENT

Inclusion supports employees' personal, long-term career ambitions

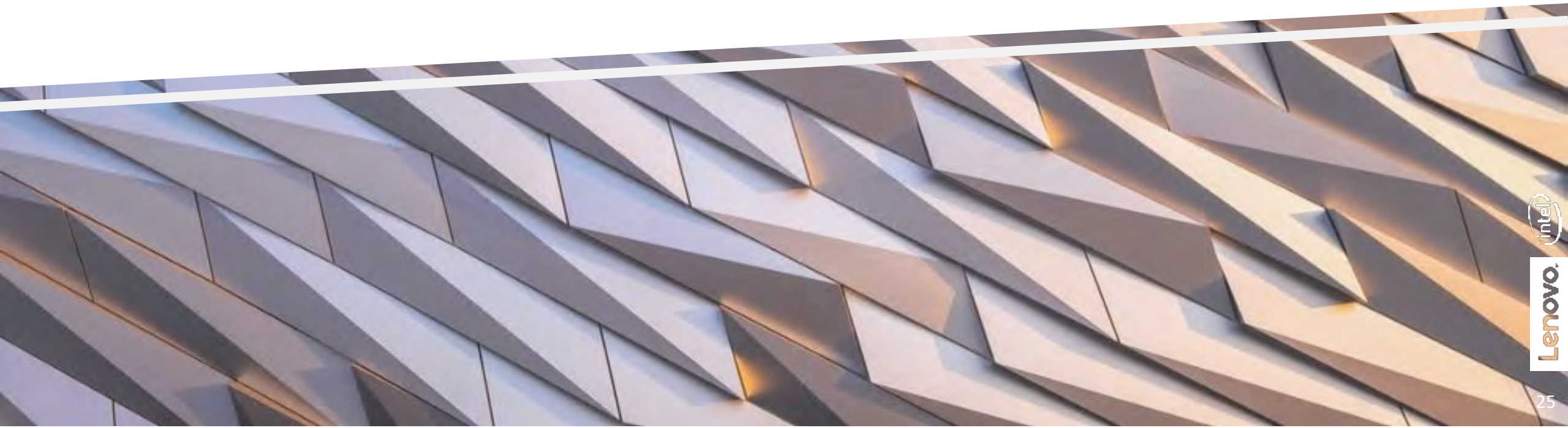
Inclusion as Empowerment

Ultimately, inclusion in the workplace is about creating an environment where employees of all backgrounds feel comfortable and supported so that they can succeed and contribute. Inclusion enables people, especially those historically marginalized groups, to fully participate and thrive on the job.

And the benefits of a diverse and inclusive workplace extend to employers. When

employees feel a sense of belonging, engagement, and satisfaction where they work, they will be more likely to stay at their company longer and perform their jobs better.

Inclusion is about **empowerment** – enabling employees to achieve their fullest potential, take risks and make bold moves, and thrive at work no matter what identity and history they bring into the office each day.



Breaking Down the Buzzwords: Defining D&I

“Diversity” and “inclusion” are often paired as a singular idea, but employees see distinctions between the concepts. They typically think of **diversity** as people who look different than them, think differently than them, and seeing themselves reflected in those around them, while **inclusion** is more focused on accepting and including all walks of life in any situation.

“To me the word **inclusion** means no one in modern media or just in everyday life being shamed for unapologetically expressing who they are. Some words that come into my mind when I think of it include feminism and acceptance. Some thoughts that I have when I think about it include how much more inclusive modern generations are amongst our friends and our peers. Some images that come into my mind include entertainers such as Lizzo that are really promoting an inclusive culture amongst young people.” – Female, US, 30

“Diversidade celebra a diferença das pessoas em qualquer âmbito de pensamento e atitude que cada um tem na vida, respeitar a individualidade e opinião dos outros.”

“Diversity celebrates the difference of people in any sphere of thought and attitude that each has in life, respecting the individuality and opinion of others.” – Male, Brazil, 32

“**[Inclusion]** means that everybody has a say, and nobody is excluded from a role in society. “
– Male, UK, 53

“多元化对我来说意味着多重文化元素互相融合，互相包容，人种多元化。整个社会的价值观不是单一的，而是多层次的。”

*“**Diversity** means to me that multiple cultural elements are fused with each other, tolerant of each other, and ethnic diversity. The values of the entire society are not single, but multi-level.”*
– Female, China, 36

“Vielfalt bedeutet, Einzigartigkeit für etwas zu haben. Zum Beispiel könnte es kulturelle Vielfalt innerhalb der Gemeinde geben, oder es gibt religiöse Vielfalt im Land.”

*“**Diversity** means having something unique. For example, there could be cultural diversity within the community, or there is religious diversity in the country.”*
– Male, Germany, 27

“[Inklusion ist] wenn sich Ausländer in eine andere Gesellschaft integrieren. Dies kann jedoch nur passieren, wenn die Gesellschaft dies zulässt.”

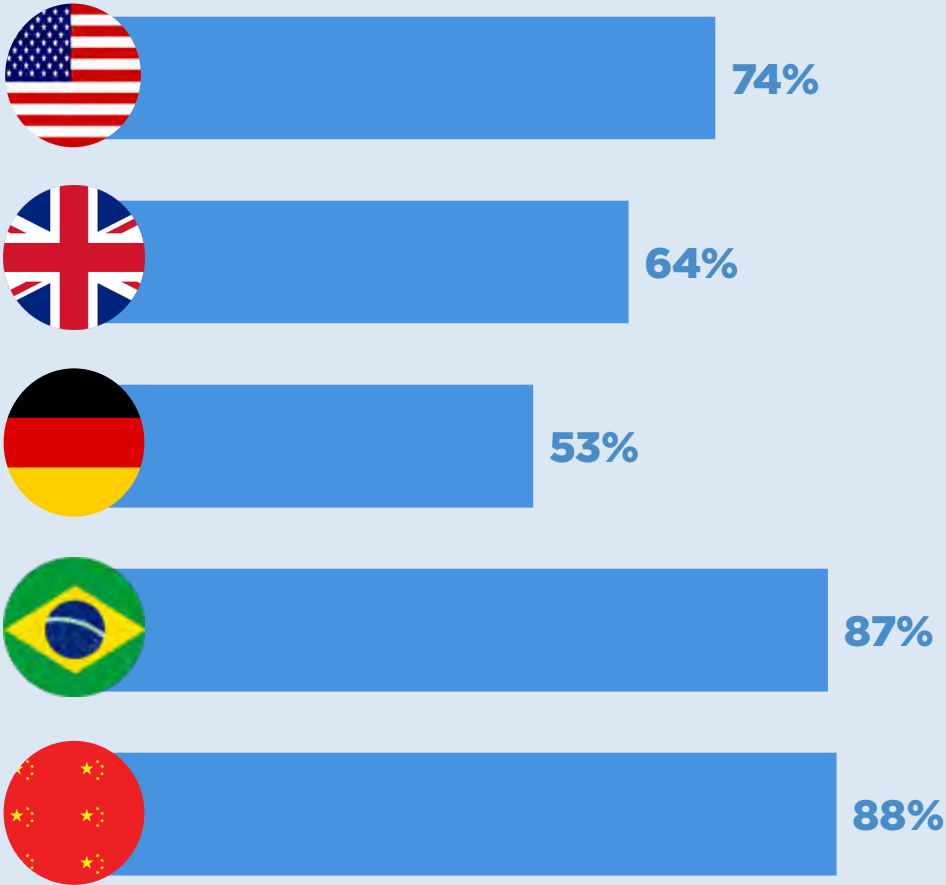
*“**[Inclusion is]** when foreigners integrate into another society. However, this can only happen if society allows it.” – Male, Germany, 28*

Positive Impact of a Diverse and Inclusive Workplace

Employees globally feel that diversity and inclusion at work has a positive impact on them personally, providing various benefits for both the employee and the employer.

“It feels great to work for a company that supports and promotes inclusivity. Having an environment where inclusivity is part of daily life helps break down barriers away from work.”
– Male, 33, UK

“Me sinto orgulhosa por fazer parte desse time, trabalho em um lugar que respeita as diferenças.”
“I feel proud to be part of this team, I work in a place that respects differences.”
– Female, 28, Brazil







“Very” or “Somewhat” positive impact on me personally at work

The Top Benefits of a Diverse and Inclusive Workplace

Globally, employees feel a greater sense of belonging in diverse and inclusive workplaces. This leads to a greater sense of engagement, more loyalty to their employers, and a feeling of psychological safety at work. A greater sense of belonging will also lead employees to realize their full potential.

EMPLOYEES WILL...

	 US	 UK	 Germany	 Brazil	 China
1	Feel a greater sense of belonging	Feel a greater sense of belonging	Feel a greater sense of belonging	Be more engaged and satisfied	Feel a greater sense of belonging
2	Be more engaged and satisfied	Be more likely to stay longer at the company	Be more engaged and satisfied	Feel a greater sense of belonging	Realize their full potential
3	Be more likely to stay longer at the company	Be more engaged and satisfied	Feel safer	Feel safer	Be more engaged and satisfied
4	Feel safer	Realize their full potential	Be more likely to stay longer at the company	Be more likely to stay longer at the company	Feel safer
5	Realize their full potential	Feel safer	Realize their full potential	Be more creative	Be more likely to stay longer at the company






Equal Treatment

An important element of inclusion is **treating people equally** and **allowing employees with different backgrounds to receive the same opportunities**.

Across all markets, employees want companies to ensure **equal pay** for employees who are equally qualified, equally experienced, and performing the same role.

In Brazil, providing diversity training for employees is of critical importance.

In China, the UK, and Brazil, having a competitive merit-based selection processes for recruitment and promotion rises to #2.

	 US	 UK	 Germany	 Brazil	 China
Ensures equal pay for employees of similar roles who are equally qualified and experienced	83%	79%	72%	93%	89%
Provides consistent accommodations to employees from all religions, regarding extra time off during religious holidays & prayer in the workplace	78%	63%	53%	88%	71%
Competitive merit-based selection processes for recruitment and promotion	77%	70%	58%	87%	88%
Provides diversity training for managers and/or all employees, which may include unconscious bias training	77%	68%	54%	93%	71%
Provides specific benefits for groups with different needs	71%	62%	54%	82%	81%
Offers all employees opportunity to purchase stock in company	68%	55%	39%	81%	73%

When thinking about equal treatment in the workplace, how important is it that your employer does each of the following? [Top-2 Box, "Extremely" + "Very" Important]



FACILITATING D&I IN THE WORKPLACE

A Closer Look at the Hiring Process + Career Development

From Interview to Retirement

People are looking to their employers to take concrete action to create inclusive environments from recruiting and hiring candidates to helping people advance their careers.

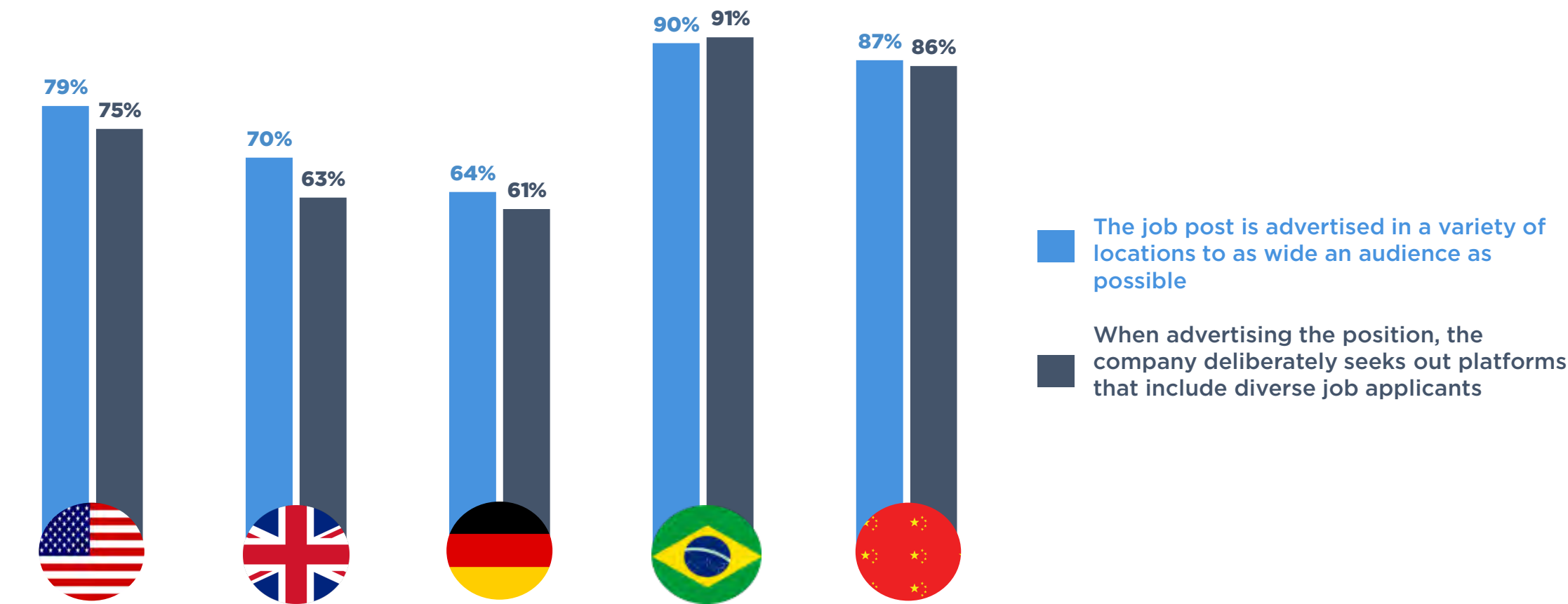
They want companies to seek out more diverse applicants and to evaluate candidates with standard criteria related to job performance rather than personal characteristics. They want promotions to be based on fair evaluations of merit rather than favoritism. And they want to see more diversity at all levels of their organizations – especially among senior leadership, where it is currently lacking.



The Recruiting Process

Employees feel it is highly important that companies advertise open positions in a variety of locations to ensure that as wide and diverse of an applicant pool as possible sees them.

They also feel companies should specifically target job advertisement platforms that include diverse job applicants.








How important is it for a company to consider each of the following when advertising for an open position? [Top-2 Box, "Extremely" + "Very" Important]

Deciding Whom to Interview

When a company is deciding who to interview for a position, employees across all markets feel that companies should use the **same standardized criteria** for all applicants.






In Brazil, employees also feel it is particularly important that the hiring manager **seeks out diverse applicants** as well.

	 US	 UK	 Germany	 Brazil	 China
The same standardized criteria are used for all applicants	83%	79%	68%	90%	84%
Before the hiring manager sees a job application, applicant's information that is not relevant to the job is removed	75%	66%	53%	83%	81%
The hiring manager seeks out diverse applicants	75%	57%	53%	89%	82%
Company has a requirement for a diverse slate of candidates , inclusive of gender, ethnicity/race, age, sexual identity or orientation, abilities, etc.	73%	64%	52%	81%	80%

Conducting an Interview

During the interview stage, employees want companies to **use standardized questions for every applicant**. Employees also want companies to **inform applicants that the company seeks, values, and promotes diverse applicants**.






In Brazil and China, employees also especially want interviews to make reasonable accommodations for diverse applicants.

	 US	 UK	 Germany	 Brazil	 China
The same standardized questions are used for every applicant	84%	77%	68%	89%	87%
Applicants are informed that the company seeks, values, and promotes diverse applicants	79%	70%	61%	89%	82%
A diverse panel of interviewers with a variety of different backgrounds is used	77%	65%	60%	85%	78%
Interviewer makes reasonable accommodation for diverse applicants , including willingness to meet when and where convenient for the applicant	73%	62%	57%	83%	82%

Fairness, Not Favoritism

When it comes time to hire an applicant, most respondents feel that it is “extremely” or “very” important that **employers offer jobs to candidates that best fit the role**, rather than based on personal connections or preferences.

Employees in the UK, Germany, and Brazil also want companies to have the **same onboarding process for all employees** and **evaluate candidates on the same criteria**.




	 US	 UK	 Germany	 Brazil	 China
Jobs are offered to candidates that best fill the role, not based on personal connections or preferences	87%	81%	73%	90%	87%
New employees all go through the same onboarding process	87%	82%	74%	93%	84%
All candidates are evaluated after interviews using the same criteria	86%	81%	74%	94%	84%
All candidates for a position at the same level receive the same offer, decided in advance	84%	77%	71%	92%	83%

How important is it for a company to consider each of the following when evaluating candidates and ultimately offering a position? [Top-2Box, “Extremely” + “Very” Important]

D&I and Long-term Career Development / Advancement: US + UK + Germany

However, hiring is not the only time in which companies should focus on diversity and inclusion. Companies also need to consider their diversity and inclusion policies when thinking about the long-term career development / advancement of employees.



Across the US, UK, and Germany, employees feel it is most important companies ensure that all employees are **evaluated equally** when considered for a promotion and that all companies **ensure that no employee is dismissed / not promoted for any personal characteristic**.

	 US	 UK	 Germany
All employees are evaluated equally when considered for promotion	88%	81%	74%
Ensure that no employee is dismissed or not promoted because of personal characteristics (e.g., gender, age, sexual orientation, ethnicity, etc.)	87%	81%	74%
All employees are given opportunities for ongoing training, advancement, and promotion	86%	80%	73%
Ensure that no employee is paid more or less than another employee with similar qualifications, experience	85%	80%	72%
Company provides all employees opportunity annually to participate in feedback about company culture	84%	75%	64%
Company audits HR processes to identify and address implicit bias	81%	73%	65%
Company establishes benchmarks for workforce	80%	72%	60%
Company holds leadership accountable to workforce diversity numbers (hiring, current representation, promotions, and attrition)	77%	68%	56%
Company commits to diverse succession planning for leadership positions	76%	69%	60%
Offers programs to advance underrepresented groups in key positions	74%	64%	55%

D&I and Long-term Career Development / Advancement: Brazil + China






In Brazil, employees want companies to ensure that all employees are given opportunities **for ongoing training, advancement, and promotion** and to ensure that **no employee is paid any more or less than other similarly experienced employees**.

In China, employees feel it is most important that companies ensure all employees are given **opportunities for ongoing training, advancement, and promotion**, and that companies **establish benchmarks for the workforce**.

	 Brazil	 China
All employees are evaluated equally when considered for promotion	93%	88%
Ensure that no employee is dismissed or not promoted because of personal characteristics (e.g., gender, age, sexual orientation, ethnicity, disability, etc.)	93%	89%
All employees are given opportunities for ongoing training, advancement, and promotion	94%	91%
Ensure that no employee is paid more or less than another employee with similar qualifications, experience	94%	83%
Company provides all employees opportunity annually to participate in feedback about company culture	92%	86%
Company audits HR processes to identify and address implicit bias	89%	85%
Company establishes benchmarks for workforce	88%	89%
Company holds leadership accountable to workforce diversity numbers (hiring, current representation, promotions, and attrition)	89%	85%
Company commits to diverse succession planning for leadership positions	92%	85%
Offers programs to advance underrepresented groups in key positions	88%	84%

The Importance of Diverse Leadership

It's not enough to be diverse and inclusive in the lower rungs of an organization. Employees in this study indicate that they want their leaders to be diverse as well. Across all markets, employees say it is "extremely" or "very" important that they see more **women** in leadership at their workplace, followed by **people with disabilities, ethnic / racial minorities, and parents**.






	 US	 UK	 Germany	 Brazil	 China
1	Women	Women	Women	Women	Women
2	Ethnic / racial minorities	People with disabilities	People with disabilities	People with disabilities	Parents
3	People with disabilities	Ethnic / racial minorities	Parents	Ethnic / racial minorities	Ethnic / racial minorities
4	Parents	Parents	Ethnic / racial minorities	Parents	People with disabilities
5	LGBT	LGBT	LGBT	Religious minorities	Religious minorities
6	Religious minorities	Religious minorities	Religious minorities	LGBT	LGBT

Thinking about leaders at your workplace, how important is it for you to see leaders representing each of the following areas? [Ranking based on Top-2 Box, "Extremely" + "Very" Important]

D&I Through the Ranks

However, while employees feel it is important to see diverse and inclusive leadership, this ideal has not been achieved.

Across all markets, employees see less and less diversity and inclusion as they work their way up the hierarchical ladder of a company.

	 US	 UK	 Germany	 Brazil	 China
1	Entry-level employees	Entry-level employees	Entry-level employees	Entry-level employees	Mid-level employees
2	Mid-level employees	Mid-level employees	Mid-level employees	Mid-level employees	Senior leadership / C-Suite
3	Senior level management	Senior level management	Senior level management	Senior level management	Entry-level employees
4	Senior leadership / C-Suite	Senior leadership / C-Suite	Senior leadership / C-Suite	Board of Directors	Senior level management
5	Board of Directors	Board of Directors	Board of Directors	Senior leadership / C-Suite	Board of Directors

Thinking about your workplace, how diverse and inclusive would you say your company is at each of the following levels? [Ranking based on Top-2 Box, "Extremely" + "Very" Diverse and Inclusive]





MENTORS AND RESOURCE GROUPS

The importance of empowering and uplifting employees of all backgrounds

Mentorship and Resource Groups in the Workplace

Employees want to see more diversity among the leaders of their organizations – and one way to achieve this is by helping those who are just starting find mentors who can help counsel and sponsor them as they advance.

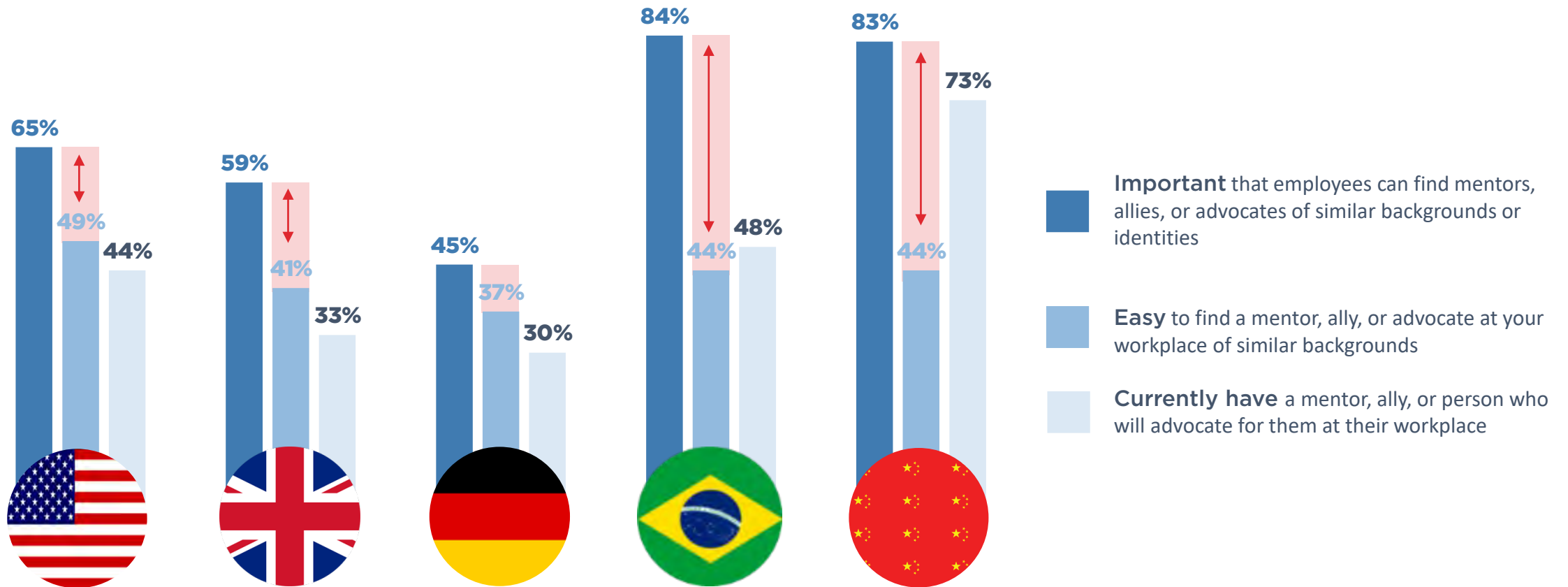
And employees agree that it is important to have access to mentors or allies, especially those of similar backgrounds as them. However, fewer feel it is easy to find such an advocate.

This gap creates an opportunity for companies to invest in mentoring programs and employee resource groups to help their rising stars develop the kinds of productive professional relationships that will help them navigate their path up the ladder.



The Mentorship Gap

Employees believe it is important that they be able to find mentors of similar backgrounds or identities as them, but far fewer currently have a mentor or believe it is easy to do so, especially in Brazil and China.

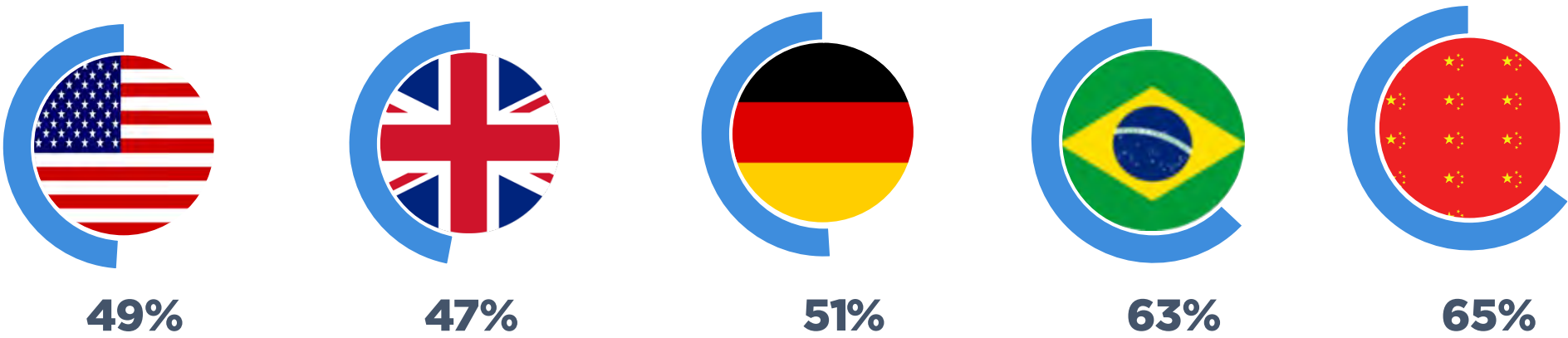


How important do you think it is that employees at your workplace are able to find mentors, allies, or advocates who are of similar backgrounds or identities as they are? [Top-2 Box, "Extremely" + "Very" Important]
Thinking about your employer, how easy is it to find a mentor, ally, or advocate at your workplace who is of a similar background or identity as you? [Top-2 Box, "Extremely" + "Very" Easy]
Do you personally have a mentor, ally, or a person who will advocate for you at your workplace? ["Yes"]

Support Groups and Programs

One way to provide mentorship is by having groups or programs for specific types of people, such as a group for LGBTQ+ individuals, women, individuals with disabilities, parents, etc.

Percent of people who are aware of groups or programs created to provide resources at their workplace

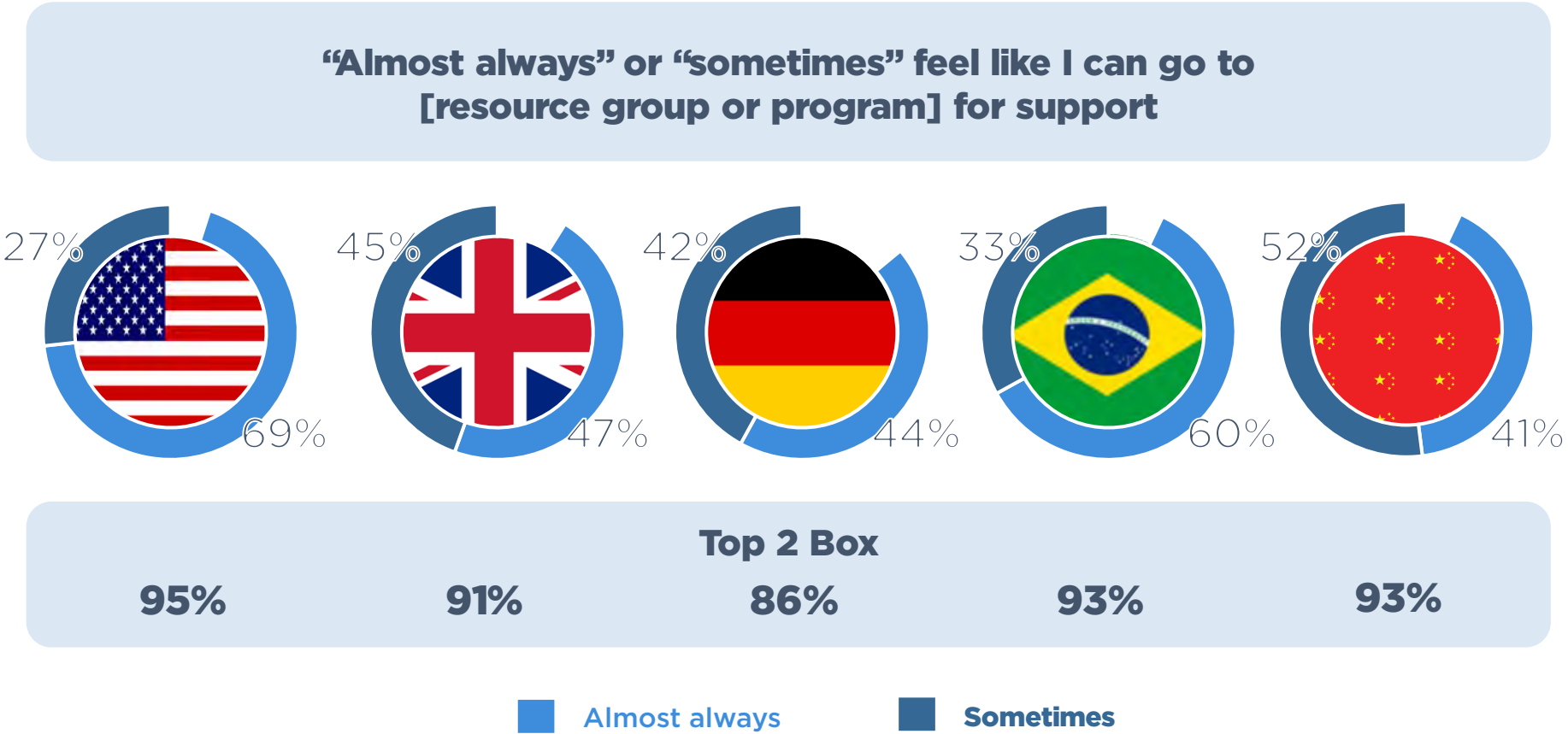


The top three type of groups per market are:

	US	UK	Germany	Brazil	China
1	People with disabilities	People with disabilities	People with disabilities	Women	Women
2	Women	Ethnic or racial minorities	Women	People with disabilities	Ethnic or racial minorities
3	Ethnic or racial minorities	Women	Parents	Ethnic or racial minorities	Parents

Finding Adequate Support

For those employees who do belong to a group or program at work that was created with the goal of providing support or resources for various groups of people, employees do feel that they can go to them for support.



Thinking about the support or resource groups or programs at your company, which of the following applies?

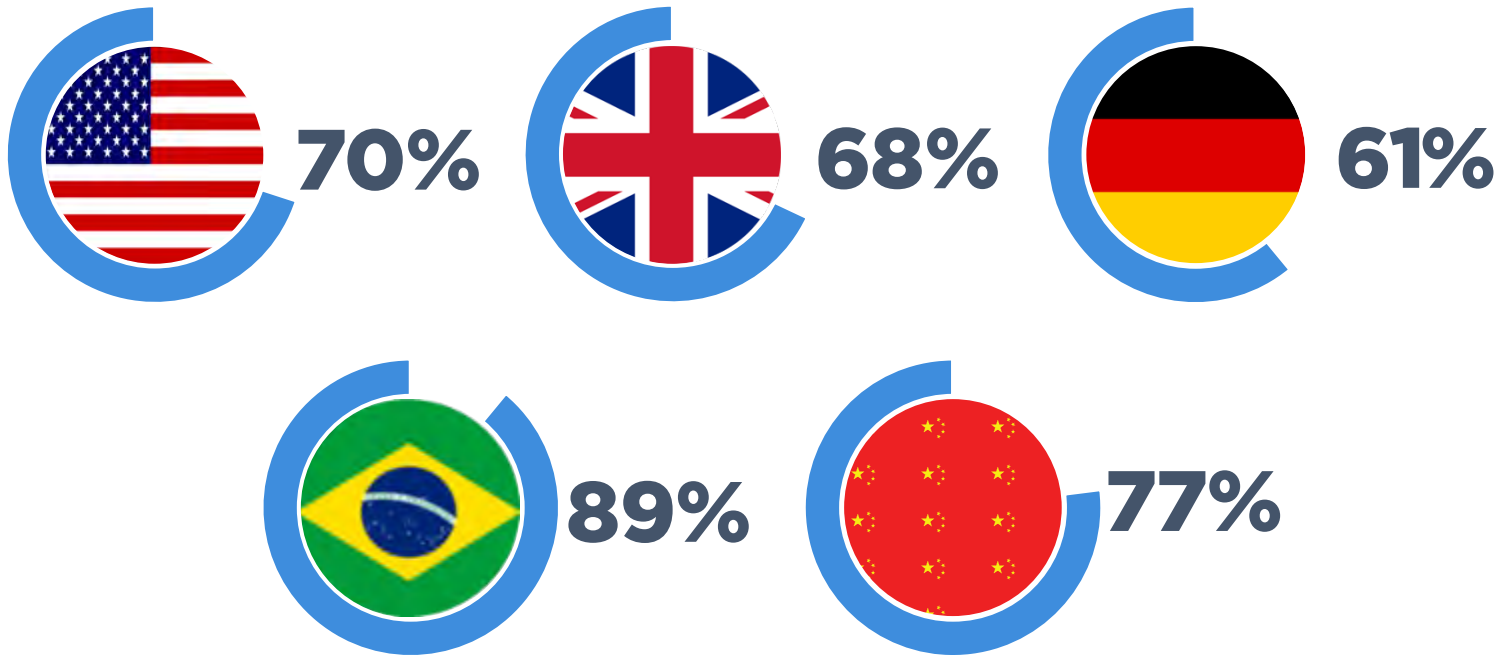
The background of the slide features a photograph of three people's silhouettes. They are positioned in front of a large window, looking out at a sunset or sunrise. The sky is filled with soft, orange and yellow clouds. The silhouettes are dark against the bright light from the window. The overall mood is contemplative and serene.

A FOCUS ON MENTAL HEALTH

Providing programs for employees of all backgrounds

Cultivating the Health and Well-Being of Your Employees

Employees also want to see their employers taking proactive steps to consider all aspects of their employees' wellbeing. A majority of employees in all markets indicate that it is important that companies offer mental health support (e.g., time off for therapy, offering stress reduction programs, etc.) for their employees as means of supporting the health and well-being of their employees



"Extremely" or "very" important that companies offer "mental health support" to support the health and well-being of their employees

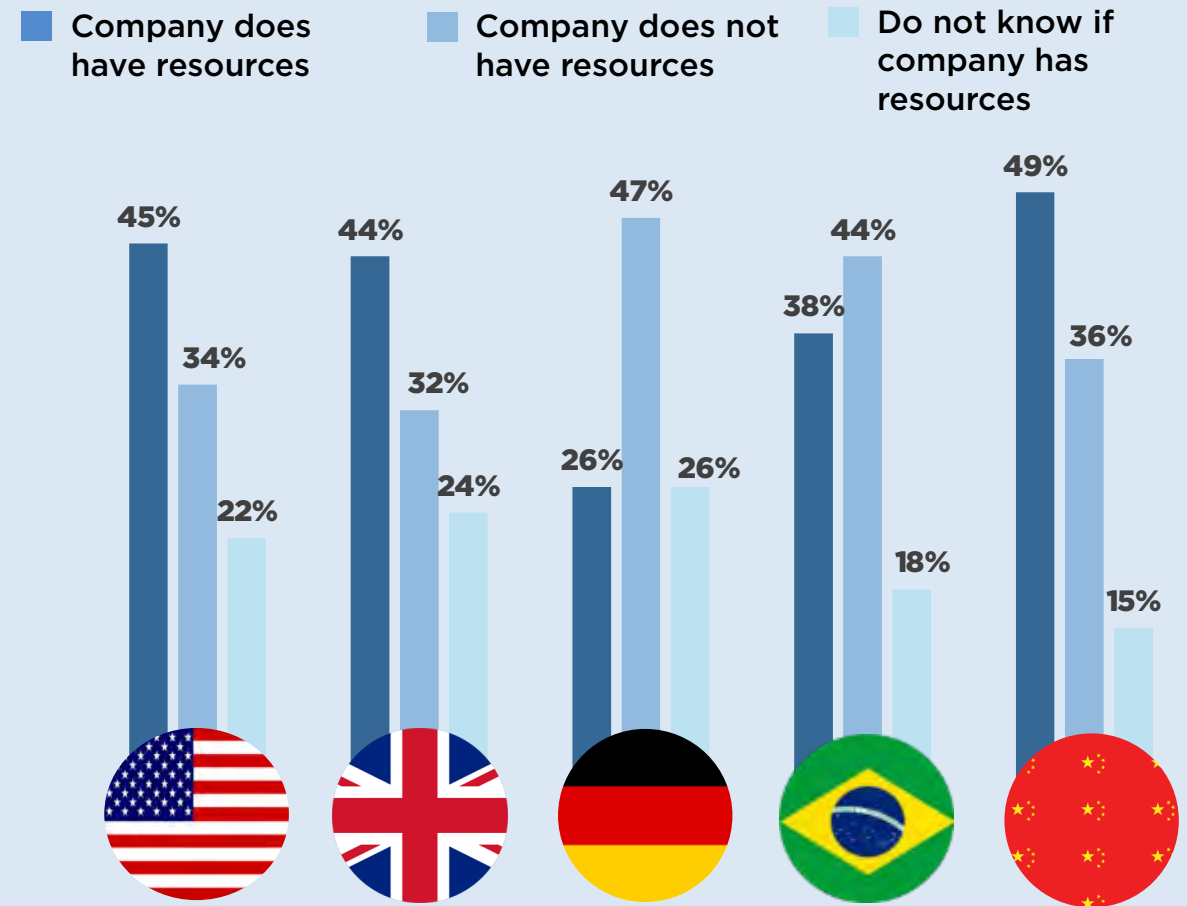


Mental Health Resources

However, across all markets, less than half of employees say their workplace has resources for those dealing with mental health issues. Many employees are also unaware of if their company has mental health resources or not.

A recent WHO-led study estimates that depression and anxiety disorders cost the global economy US\$ 1 trillion each year in lost productivity. Workplaces that promote mental health and support people with mental disorders are more likely to reduce absenteeism, increase productivity and benefit from associated economic gains.

– World Health Organization, May 2019



Are there resources offered for those dealing with mental health issues at your workplace?

Mental Health Resources

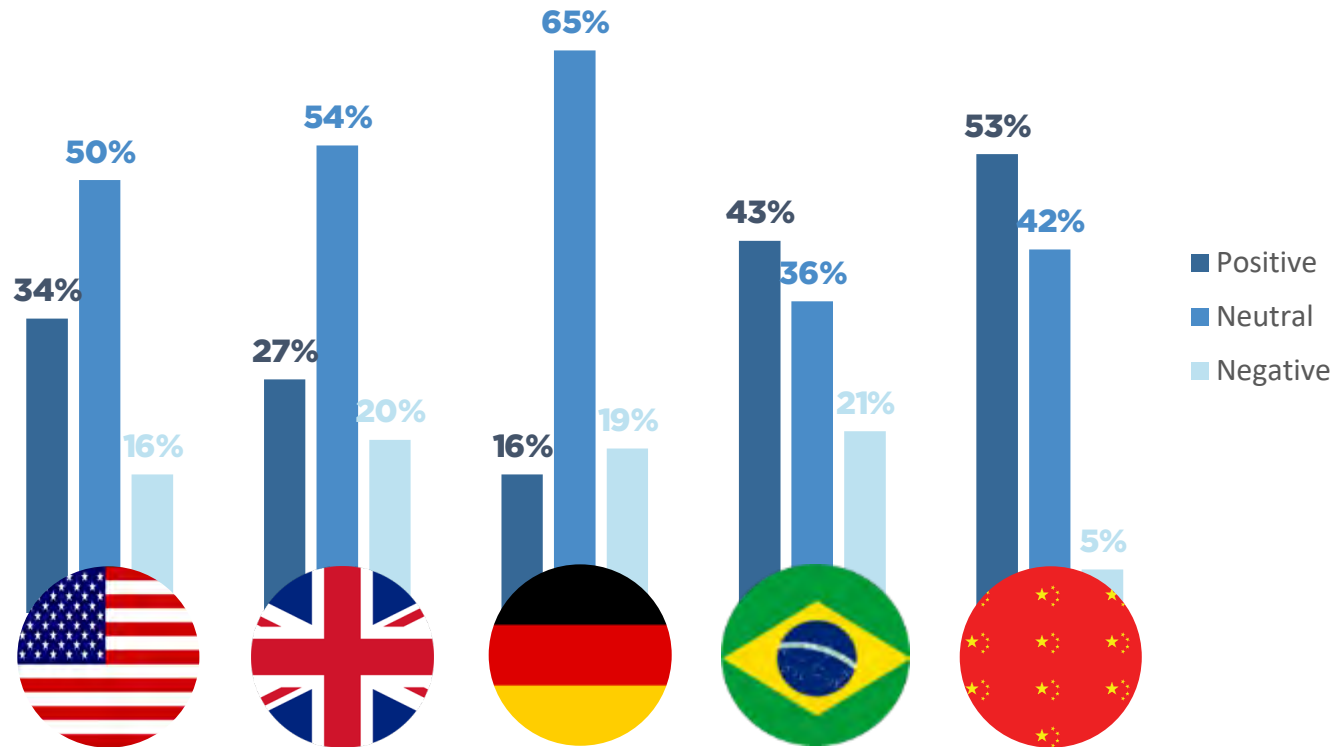
For companies do have mental health resources, the top resources employees indicate their companies have are mental health hotlines, paid time off or subsidies for counseling, and on-site counseling.

	 US	 UK	 Germany	 Brazil	 China
1	Access to hotlines for mental health issues	On-site counseling / therapy	On-site counseling / therapy	On-site counseling / therapy	On-site counseling / therapy
2	Paid time off for counseling / therapy	Access to hotlines for mental health issues	Subsidies for counseling / therapy	Paid time off for counseling / therapy	Paid time off for counseling / therapy
3	On-site counseling / therapy	Paid time off for counseling / therapy	Paid time off for counseling / therapy	Access to hotlines for mental health issues	Access to hotlines for mental health issues

Tech and Mental Health

Employees are divided on the effect that technology is having on mental health. On average, more employees feel that tech is having a positive, rather than negative, impact on mental health; however, about half of employees say that technology's impact on mental health is neutral.

Only in Germany do employees feel that technology is having more of a negative effect on mental health than positive.



Thinking about the role of technology on mental health, do you feel technology has had a positive or negative impact on people's mental health, overall? [Top-2 Box, "Very" + "Somewhat" Positive and Bottom-2 Box, "Very" + "Somewhat" Negative]

TECHNOLOGY AS A FACILITATOR

Getting us from where we are now, to where we strive to be

Tech Could Pave the Way

Technology will play an integral role in achieving D&I in the workplace. It has the power to bridge accessibility gaps, connect people otherwise divided, and expand the impact of continual training programs. It already facilitates the ability to work in more dynamic, flexible ways, with employees in Brazil and China valuing **the ability to collaborate with coworkers across various markets as the #1 benefit of tech in the workplace.**

If a more diverse and inclusive workplace is the goal, **technology has the potential to get us there**—it facilitates human connection, understanding, and, ultimately, empathy. From creating dynamic and flexible work environments to improving global employee connectivity, technology is already moving us in the right direction.

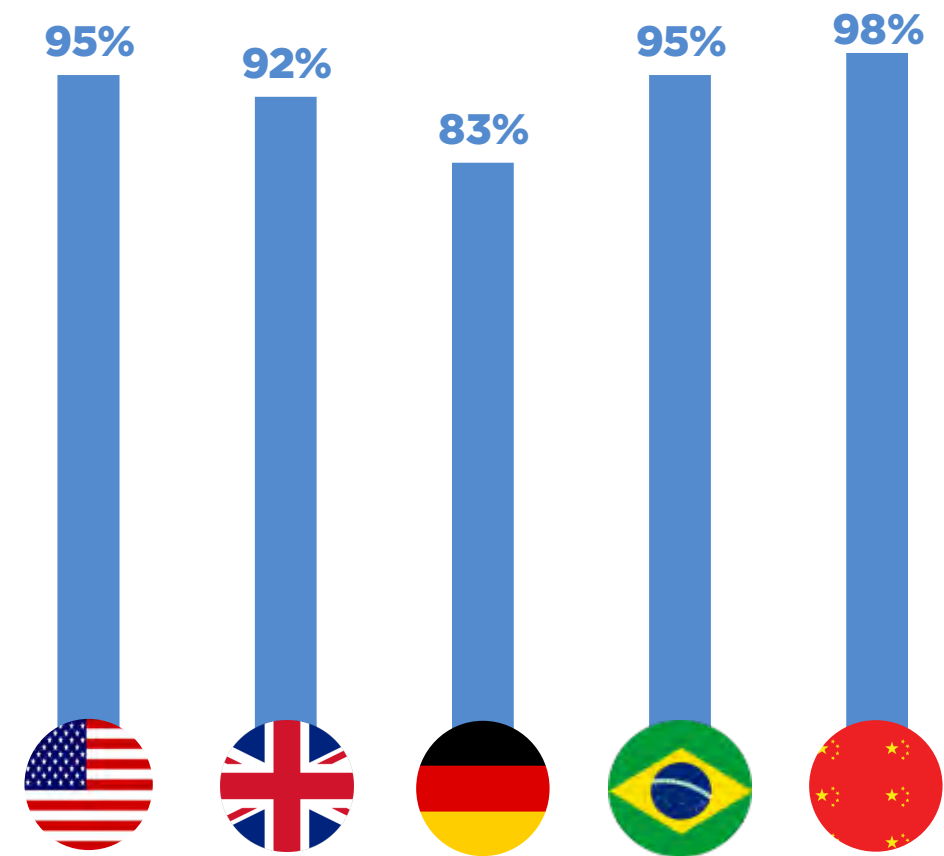
This potential of technology does not come without apprehension—many people worry about whether technology, including AI, could potentially silence or leave behind those historically marginalized or underrepresented. Although employees express some concerns over the harmful potential of AI, those in the emerging markets are more optimistic, with **more than 8-in-10 employees in Brazil and China agreeing that AI can be used to make the workplace more diverse and inclusive.**

One potential solution to ensure technology is a force for good, according to employees, is to have future innovations spearheaded and developed by **diverse and inclusive developer teams, who will challenge assumptions and provide fresh perspectives.**








Technology = Flexibility

An overwhelming majority of employees feel that technological advances have allowed people to work in more dynamic and flexible ways.



"Strongly" or "somewhat" Agree [Top-2 Box] with "Advances in technology have allowed people to work in more dynamic and flexible ways"

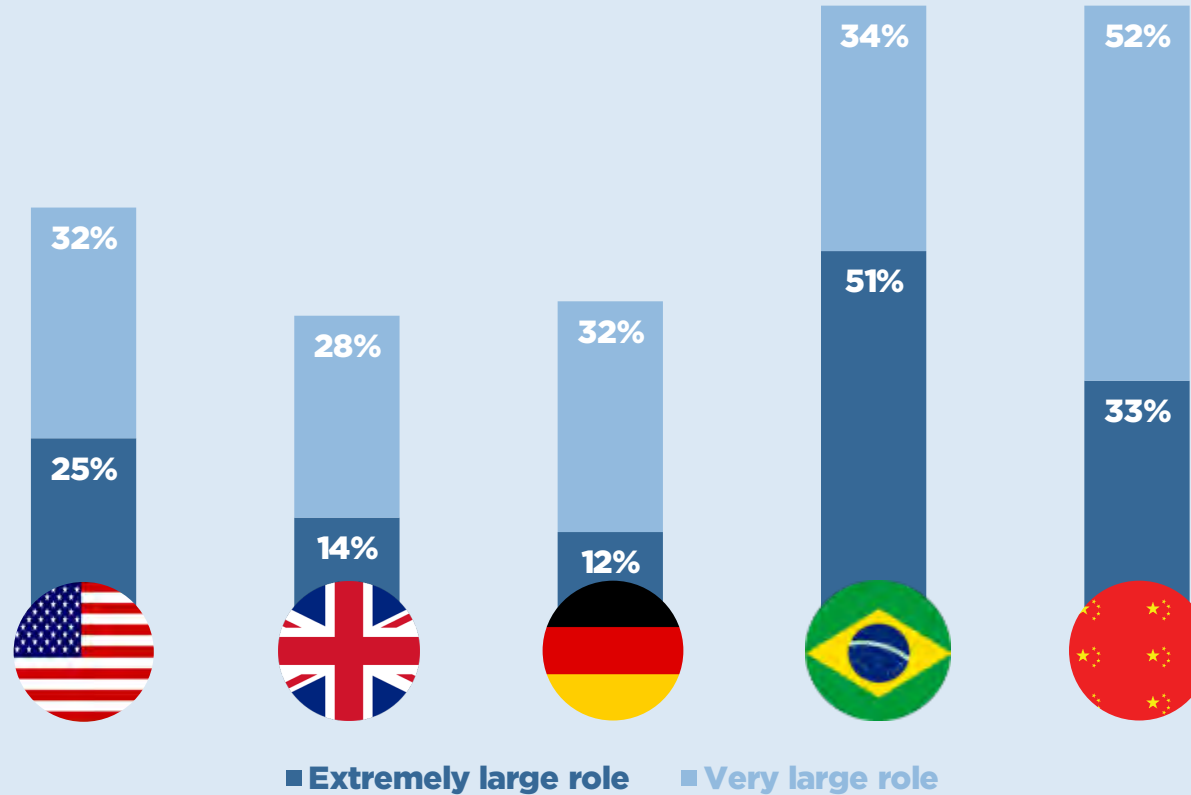
When it comes to how tech makes work more dynamic and flexible, employees in the US and UK value how technology has made it easier to do various assignments and fulfill various responsibilities, while in Brazil and China, employees value the ability to collaborate. In Germany, employees value flexibility.

-  Making it easier to complete work assignments or responsibilities
-  Making it easier to complete work assignments or responsibilities
-  Working more flexible hours
-  Being able to collaborate with coworkers in different office locations
-  Being able to collaborate with coworkers in different office locations

In which of the following ways has technology empowered you to work in more dynamic and flexible ways? [Top response in each market]

Tech as Facilitator

Employees across all markets feel that technology is playing a big role in advancing workplace D&I – this is especially true in emerging markets like Brazil and China, where more than 8-in-10 employees believe tech is playing “extremely” or “very” large role in cultivating diverse and inclusive environments in the workplace.



AI: Opportunities and Challenges for D&I

Some employees worry that Artificial Intelligence could be harmful to people from marginalized or underrepresented communities

- This worry is consistent across markets: US (57%), UK (45%), Germany (41%), Brazil (54%), China (64%)

However, employees also feel that Artificial Intelligence can be used to make workplaces more diverse and inclusive.

- This is especially true in Brazil (82%) and China (92%), with more than 8-in-10 employees in agreement
- About half of respondents in the US (54%), UK (51%), and Germany (51%) feel the same

“AI is basically the start of when we stop thinking, learning and doing for ourselves. We become overdependent on AI which will have to be programmed or enhanced with learning ability. There have been several books and movies why that can be a possible bad idea.”

- Female, 31, US

“因为人工智能可以理性的分析问题，而人比较感性，避免了感情用事。”

“Because artificial intelligence can analyze problems rationally, and people are more emotional, avoiding emotional use.” -

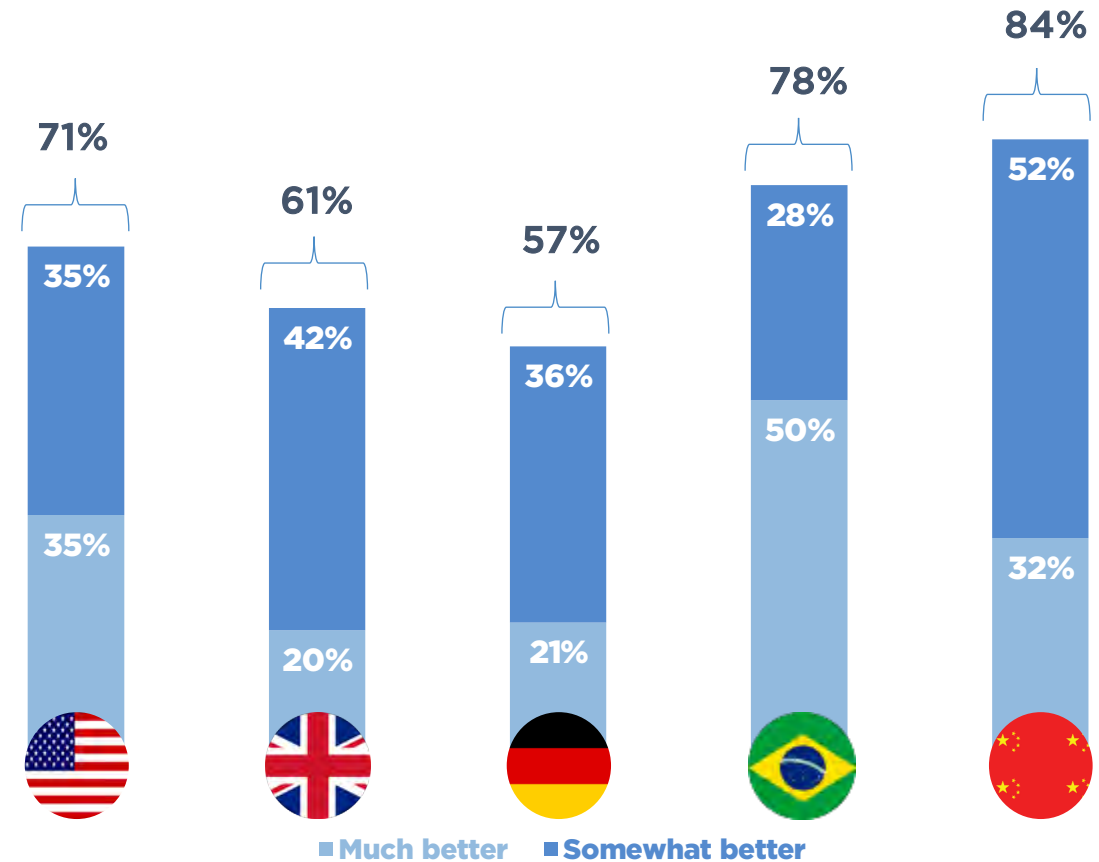
Female, 27, China

Please indicate how much you agree or disagree with the following statement: Artificial Intelligence (AI) could be harmful to people from marginalized or underrepresented communities. [Top-2 Box, “Strongly” + “Somewhat” Agree]

Please indicate how much you agree or disagree with the following statement: Artificial Intelligence (AI) can be used to make organizations more diverse and inclusive. [Top-2 Box, “Strongly” + “Somewhat” Agree]

Diverse and Inclusive Teams Create Better Tech

Employees across all markets, particularly in the US, Brazil, and China, agree that technology products and services are generally better when developed by teams consisting of different types of people (e.g., gender, age, sexual orientation, ethnicity, disability, etc.).

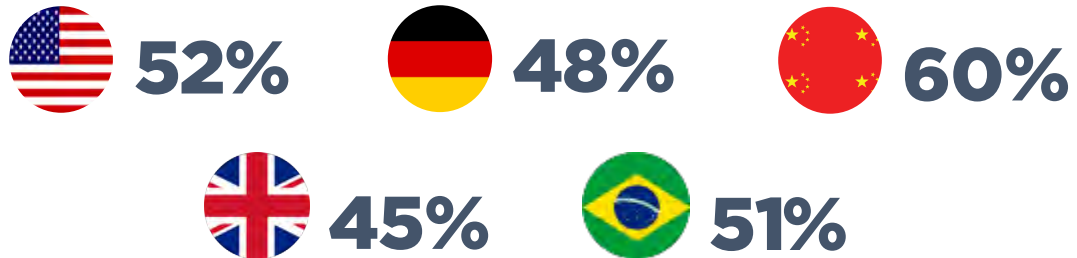


In your opinion, are technology products and services better or worse when they are developed by teams consisting of different types of people (e.g., gender, age, sexual orientation, ethnicity, etc.)?

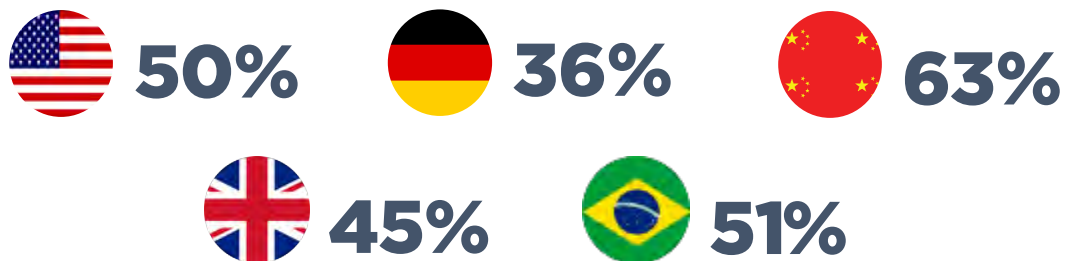
The Benefits of Diverse Teams in the Development Process

Tech developed by diverse and inclusive teams of people...

Will be more appropriate for broader groups of different people



Will be more inclusive



Which of the following do you believe are the greatest benefits of having diverse and inclusive groups of employees?



Employees see the benefits of technology being developed by diverse teams

Tech developed by diverse and inclusive teams of people...

Will be more innovative



44%



39%



45%



50%



54%

Will be easier to use for broader groups of different people



49%



46%



45%



52%



53%

Will ensure that different types of people are getting jobs in the tech sector



47%



41%



41%



51%



46%

Which of the following do you believe are the greatest benefits of having diverse and inclusive groups of employees?

Thank you!



APPENDIX

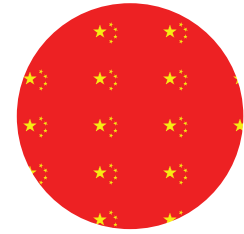
Methodology

Lenovo and Intel commissioned Zeno Group to conduct an online survey among n = 5,096 employees across 5 global markets (United States, United Kingdom, Brazil, Germany, China) in order to understand the evolving role of diversity and inclusion within the workplace. The survey consisted of a series of closed-end and open-ended questions.

The survey fielded December 19, 2019 to January 7, 2020, and the margin of error is +/- 3 percentage points for each market at a 95% confidence level.

To qualify as “employees” for the survey, respondents had to meet the following criteria:

- Age 18+
- Employed full-time or part-time
- Not self-employed
- Any business size
- Any level of seniority/tenure at job



Methodology Continued

Globally, 86% of respondents were employed full-time and 14% were employed part-time. Respondents had to have access to the Internet (through any device, including mobile) in order to complete the survey.

Respondents were recruited by Lucid, using double opt-in screeners in which respondents had to consent twice to participate the survey. Respondents were asked a series of demographic questions, and weights were applied to ensure a demographically representative population of “online” employees. Results of any sample are subject to sampling variation. Visually impaired respondents were provided the option to participate via phone.

Market	Sample Size (n)	Language	Ratio of Full-Time : Part-Time Employees	Quotas set on:
US	1,054	American English	84:16	Age, Gender, Employment Status, Region
UK	1,007	British English	84:16	Age, Gender, Employment Status
Germany	1,011	German	79:21	Age, Gender, Employment Status
Brazil	1,012	Brazilian Portuguese	84:16	Age, Gender, Employment Status
China	1,012	Simplified Chinese	98:02	Age, Gender, Employment Status

For full survey results or for further inquiries, please email LenovoDIResearch@zenogroup.com.

Demographics

		Global	US	UK	Brazil	Germany	China
		Base (5096)	Base (1019)	Base (1019)	Base (1019)	Base (1019)	Base (1019)
Gender							
	Female	50%	52%	49%	49%	51%	49%
	Male	49%	47%	50%	50%	48%	51%
	Non-binary	0%	1%	0%	1%	0%	0%
	Prefer not to say	0%	0%	0%	0%	0%	0%
Age Range							
	18-24	13%	13%	10%	21%	8%	12%
	25-34	30%	24%	22%	30%	23%	50%
	35-44	25%	24%	25%	25%	25%	27%
	45-54	19%	20%	25%	16%	24%	9%
	55-64	11%	14%	15%	8%	18%	2%
	65-74	2%	4%	2%	1%	2%	0%
	75+	0%	1%	0%	0%	0%	0%
Generation							
	Gen Z: 18-23	10%	11%	8%	17%	7%	9%
	Millennials: 24 - 41	52%	45%	42%	54%	43%	75%
	Gen Xers: 42 - 54	25%	26%	32%	20%	30%	14%
	Boomers: 55 - 73	13%	18%	17%	9%	20%	2%
	Matures: 74+	0%	1%	0%	0%	0%	0%
Which of the following best describes your current employment status							
	Full-time employment	86%	84%	84%	84%	79%	98%
	Part-time employment	14%	16%	16%	16%	21%	2%
	Full-time student	1%	1%	0%	1%	0%	0%
	Part-time student	1%	1%	0%	1%	0%	0%
	Unemployed and looking for work	0%	0%	0%	0%	0%	0%
	Unemployed and not looking for work	0%	0%	0%	0%	0%	0%
	Disabled	0%	0%	0%	0%	0%	0%
	Retired or semi-retired	0%	0%	0%	0%	0%	0%
	Stay-at-Home parent / Caregiver	0%	0%	0%	0%	0%	0%
	None of the above	0%	0%	0%	0%	0%	0%
Now, thinking about your primary employment / employer, which best describes your primary employment or employer							
	Self-employed	0%	0%	0%	0%	0%	0%
	Own my own company / business (have other employees who work for me)	3%	5%	2%	5%	3%	3%
	Work at a family-owned business	6%	7%	6%	5%	9%	2%
	Work at a domestic-based privately-held company	32%	24%	22%	33%	34%	45%
	Work at a multinational privately-held company	15%	12%	22%	18%	15%	7%
	Work at a multinational public company	9%	10%	9%	10%	10%	7%
	Work at a domestic-based public company	15%	16%	11%	11%	15%	22%
	Employed by local or national government	12%	13%	20%	11%	7%	9%
	None of the above	8%	12%	7%	7%	8%	5%
What industry do you currently work in							
	Education	10%	11%	12%	11%	8%	7%
	Energy	2%	1%	2%	2%	1%	4%
	Financial services - banking, insurance, accounting	9%	8%	8%	9%	7%	11%
	Food production	2%	2%	2%	3%	2%	1%
	Government - local, state, national	6%	4%	8%	8%	5%	4%
	Healthcare	9%	14%	13%	4%	9%	4%
	Hotel and travel services	2%	2%	2%	1%	2%	2%
	Manufacturing	12%	7%	10%	4%	12%	26%
	Media, entertainment	1%	1%	1%	1%	2%	2%
	Non-profits, NGOs, advocacy organizations	2%	2%	2%	0%	4%	1%
	Professional services - legal, consulting	3%	2%	3%	3%	5%	2%
	Public relations, advertising, marketing, market research	2%	1%	1%	3%	3%	1%
	Real estate or construction	4%	3%	3%	3%	3%	9%
	Restaurants, dining	3%	4%	3%	2%	2%	2%
	Retail	10%	10%	12%	8%	10%	8%

Technology	11%	10%	6%	19%	8%	12%
Transportation (planes trains, cars, infrastructure)	4%	3%	4%	4%	5%	2%
Other - Please specify:	10%	12%	10%	14%	11%	3%
US Only_Which of the following best represents your ethnic or racial background						
WHITE	0%	65%	0%	0%	0%	0%
BLACK	0%	14%	0%	0%	0%	0%
HISPANIC, LATINO	0%	14%	0%	0%	0%	0%
ASIAN	0%	5%	0%	0%	0%	0%
MIDDLE EASTERN	0%	0%	0%	0%	0%	0%
AMERICAN INDIAN	0%	1%	0%	0%	0%	0%
OTHER	0%	1%	0%	0%	0%	0%
US Only_Are you of Hispanic or Latino descent						
Yes	0%	6%	0%	0%	0%	0%
No	0%	94%	0%	0%	0%	0%
Brazil Only_What region do you currently live in						
North Region	0%	0%	0%	5%	0%	0%
Northeast Region	0%	0%	0%	20%	0%	0%
Central-West Region	0%	0%	0%	8%	0%	0%
Southeast Region	0%	0%	0%	52%	0%	0%
South Region	0%	0%	0%	15%	0%	0%
DO NOT LIVE IN BRAZIL	0%	0%	0%	0%	0%	0%
Brazil Only_Which of the following best represents your ethnic or racial background						
Branca	0%	0%	0%	55%	0%	0%
Parda	0%	0%	0%	32%	0%	0%
Negra	0%	0%	0%	9%	0%	0%
Amarela	0%	0%	0%	2%	0%	0%
Indigena	0%	0%	0%	1%	0%	0%
Outro/a - Especifique:	0%	0%	0%	1%	0%	0%
None of the above	0%	0%	0%	0%	0%	0%
UK Only_Where do you live						
East of England	0%	0%	8%	0%	0%	0%
East Midlands	0%	0%	6%	0%	0%	0%
London	0%	0%	13%	0%	0%	0%
North East	0%	0%	5%	0%	0%	0%
North West	0%	0%	13%	0%	0%	0%
Northern Ireland	0%	0%	2%	0%	0%	0%
Scotland	0%	0%	7%	0%	0%	0%
South East	0%	0%	11%	0%	0%	0%
South West	0%	0%	10%	0%	0%	0%
Wales	0%	0%	5%	0%	0%	0%
West Midlands	0%	0%	10%	0%	0%	0%
Yorkshire and the Humber	0%	0%	10%	0%	0%	0%
DO NOT LIVE IN UK	0%	0%	0%	0%	0%	0%
UK Only_Which of the following best represents your ethnic or racial background						
White	0%	0%	87%	0%	0%	0%
- Indian, Pakistani, Bangladeshi, Chinese, Japanese, Korean, Vietnamese, Thai, etc.	0%	0%	8%	0%	0%	0%
African, Black, Caribbean	0%	0%	3%	0%	0%	0%
can - Lebanese, Syrian, Jordanian, Iraqi, Egyptian, Palestinian, Persian, Turkish, etc.	0%	0%	1%	0%	0%	0%
no - Cuban, Mexican, Puerto Rican, Dominican, Central American, South American	0%	0%	0%	0%	0%	0%
Other - Please specify:	0%	0%	1%	0%	0%	0%
Germany Only_What state do you currently live in						
Baden-Wuerttemberg	0%	0%	0%	0%	11%	0%
Bavaria	0%	0%	0%	0%	15%	0%
Berlin	0%	0%	0%	0%	8%	0%
Brandenburg	0%	0%	0%	0%	3%	0%
Bremen	0%	0%	0%	0%	1%	0%
Hamburg	0%	0%	0%	0%	4%	0%

Hesse	0%	0%	0%	0%	7%	0%
Lower Saxony	0%	0%	0%	0%	7%	0%
Mecklenburg-Vorpommern	0%	0%	0%	0%	2%	0%
North Rhine-Westphalia	0%	0%	0%	0%	21%	0%
Rhineland-Palatinate	0%	0%	0%	0%	4%	0%
Saarland	0%	0%	0%	0%	1%	0%
Saxony	0%	0%	0%	0%	5%	0%
Saxony-Anhalt	0%	0%	0%	0%	4%	0%
Schleswig-Holstein	0%	0%	0%	0%	2%	0%
Thuringia	0%	0%	0%	0%	4%	0%
DO NOT LIVE IN GERMANY	0%	0%	0%	0%	0%	0%
China Only_What province do you currently live in						
Anhui	0%	0%	0%	0%	0%	2%
Beijing	0%	0%	0%	0%	0%	17%
Chongqing	0%	0%	0%	0%	0%	3%
Fujian	0%	0%	0%	0%	0%	3%
Guangdong	0%	0%	0%	0%	0%	19%
Gansu	0%	0%	0%	0%	0%	0%
Guangxi Zhuang	0%	0%	0%	0%	0%	0%
Guizhou	0%	0%	0%	0%	0%	1%
Hainan	0%	0%	0%	0%	0%	0%
Hebei	0%	0%	0%	0%	0%	2%
Heilongjiang	0%	0%	0%	0%	0%	1%
Henan	0%	0%	0%	0%	0%	1%
Hong Kong	0%	0%	0%	0%	0%	0%
Hubei	0%	0%	0%	0%	0%	3%
Hunan	0%	0%	0%	0%	0%	2%
Inner Mongolia	0%	0%	0%	0%	0%	0%
Jiangsu	0%	0%	0%	0%	0%	5%
Jiangxi	0%	0%	0%	0%	0%	1%
Jilin	0%	0%	0%	0%	0%	0%
Liaoning	0%	0%	0%	0%	0%	2%
Macau	0%	0%	0%	0%	0%	0%
Ningxia Hui	0%	0%	0%	0%	0%	0%
Qinghai	0%	0%	0%	0%	0%	0%
Shaanxi	0%	0%	0%	0%	0%	1%
Shandong	0%	0%	0%	0%	0%	4%
Shanghai	0%	0%	0%	0%	0%	20%
Shanxi	0%	0%	0%	0%	0%	1%
Sichuan	0%	0%	0%	0%	0%	5%
Tianjin	0%	0%	0%	0%	0%	2%
Tibet	0%	0%	0%	0%	0%	0%
Xinjiang Uyghur	0%	0%	0%	0%	0%	0%
Yunnan	0%	0%	0%	0%	0%	0%
Zhejiang	0%	0%	0%	0%	0%	4%
DO NOT LIVE IN CHINA	0%	0%	0%	0%	0%	0%
How long have you been working for your current employer						
Less than 1 year	9%	12%	9%	11%	9%	5%
1 - 2 years	15%	16%	15%	17%	14%	13%
3 - 5 years	26%	24%	25%	27%	22%	34%
6 - 10 years	25%	24%	21%	27%	22%	32%
11 - 20 years	15%	15%	19%	13%	15%	11%
More than 20 years	9%	9%	11%	5%	17%	5%
Altogether, how many years have you been in the workforce						
Less than 1 year	5%	2%	2%	9%	9%	2%
1 - 2 years	9%	5%	6%	16%	12%	5%
3 - 5 years	19%	12%	15%	25%	22%	22%
6 - 10 years	24%	18%	16%	29%	23%	37%
11 - 20 years	19%	21%	21%	14%	17%	23%

More than 20 years	24%	42%	41%	8%	17%	12%
Which of the following best describes your position / title at your company						
Owner / President / CEO	4%	5%	3%	6%	3%	3%
Executive / C-Suite (CFO, COO, CTO, CIO)	5%	5%	3%	6%	5%	5%
Executive Director / Managing Director / Director	8%	8%	5%	16%	6%	5%
Partner / Managing Partner	4%	3%	3%	9%	4%	3%
Other Senior Management	10%	7%	8%	9%	6%	17%
Mid-level or Junior Management	21%	16%	24%	11%	11%	45%
Professional / Individual Contributor	17%	15%	14%	13%	30%	13%
Employee / Staff	30%	38%	39%	27%	34%	9%
Other - Please specify:	1%	2%	1%	3%	1%	0%
Approximately how many employees does your company have (across all locations and business units)						
Fewer than 10	6%	6%	5%	11%	9%	1%
11 - 49	10%	11%	9%	11%	13%	6%
50 - 99	11%	9%	9%	10%	12%	12%
100 - 249	13%	13%	13%	10%	12%	17%
250 - 499	12%	10%	12%	10%	10%	17%
500 - 999	14%	13%	11%	14%	11%	21%
1,000 - 4,999	16%	15%	16%	16%	14%	18%
5,000 - 9,999	6%	6%	8%	8%	7%	4%
10,000 +	12%	15%	17%	10%	12%	5%
Which of the following best describes your marital status						
Married	52%	44%	47%	53%	42%	74%
Not married and living with partner	16%	17%	20%	10%	21%	11%
Not married and not living with partner	24%	28%	26%	30%	24%	14%
Widowed	1%	2%	1%	1%	2%	0%
Divorced or separated	7%	9%	7%	6%	10%	1%
Do you have children under 18 living at home with you						
Yes	48%	41%	43%	54%	35%	67%
No	52%	59%	57%	46%	65%	33%
US Only_Do you live in a						
City or urban area	0%	41%	0%	0%	0%	0%
Suburb	0%	43%	0%	0%	0%	0%
Rural area	0%	16%	0%	0%	0%	0%
US Only_Which of the following best describes your highest level of education						
High school, GED or less	0%	18%	0%	0%	0%	0%
Vocational or technical school	0%	5%	0%	0%	0%	0%
Some college, 2-year college, associate's degree	0%	29%	0%	0%	0%	0%
4-year college degree, bachelor's degree	0%	33%	0%	0%	0%	0%
Post-graduate (e.g. master's, doctorate)	0%	15%	0%	0%	0%	0%
US Only_Which of the following best describes your total household income, before taxes, for 2018						
Under \$25,000	0%	11%	0%	0%	0%	0%
\$25,000 to \$49,999	0%	23%	0%	0%	0%	0%
\$50,000 to \$74,999	0%	22%	0%	0%	0%	0%
\$75,000 to \$99,999	0%	15%	0%	0%	0%	0%
\$100,000 to \$124,999	0%	10%	0%	0%	0%	0%
\$125,000 to \$149,999	0%	7%	0%	0%	0%	0%
\$150,000 or more	0%	10%	0%	0%	0%	0%
Prefer not to answer	0%	2%	0%	0%	0%	0%
Brazil Only_Do you live in a						
City or urban area	0%	0%	0%	97%	0%	0%
Village or rural area	0%	0%	0%	3%	0%	0%
Brazil Only_Which of the following best describes your highest level of education you have completed						
High school (Ensino Médio)	0%	0%	0%	25%	0%	0%
Technical (Ensino Técnico)	0%	0%	0%	13%	0%	0%
Bachelor's degree (Bacharelado / Licenciatura)	0%	0%	0%	43%	0%	0%

Master's degree (Mestrado)	0%	0%	0%	14%	0%	0%
Doctorate (Doutorado)	0%	0%	0%	6%	0%	0%
Brazil Only_Which of the following best represents your total monthly household income						
Less than 1,356 reals	0%	0%	0%	5%	0%	0%
1,357 - 2,034 reals	0%	0%	0%	13%	0%	0%
2,035 - 3,390 reals	0%	0%	0%	16%	0%	0%
3,391 - 6,780 reals	0%	0%	0%	29%	0%	0%
6,781 - 13,560 reals	0%	0%	0%	21%	0%	0%
13,561 - 33,900 reals	0%	0%	0%	9%	0%	0%
33,901 reals or more	0%	0%	0%	5%	0%	0%
Prefer not to answer	0%	0%	0%	2%	0%	0%
UK Only_Do you live in a						
City or urban area	0%	0%	39%	0%	0%	0%
Outskirts near a city or urban area	0%	0%	35%	0%	0%	0%
Village, small town or rural area	0%	0%	26%	0%	0%	0%
UK Only_Which of the following best describes your highest level of education you have completed						
GCSE, O-level or below	0%	0%	25%	0%	0%	0%
A-level	0%	0%	26%	0%	0%	0%
University graduate	0%	0%	31%	0%	0%	0%
Post-graduate	0%	0%	15%	0%	0%	0%
Vocational	0%	0%	3%	0%	0%	0%
UK Only_Which of the following best represents your total annual household income for 2018						
Under £6,000 per year	0%	0%	1%	0%	0%	0%
£6,000-£12,999 per year	0%	0%	5%	0%	0%	0%
£13,000-£18,999 per year	0%	0%	10%	0%	0%	0%
£19,000-£25,999 per year	0%	0%	15%	0%	0%	0%
£26,000-£31,999 per year	0%	0%	13%	0%	0%	0%
£32,000-£47,999 per year	0%	0%	24%	0%	0%	0%
£48,000-£63,999 per year	0%	0%	16%	0%	0%	0%
£64,000 per year or more	0%	0%	14%	0%	0%	0%
Prefer not to answer	0%	0%	3%	0%	0%	0%
Germany Only_Which of the following best describes your highest level of education						
Gymnasium or below	0%	0%	0%	0%	53%	0%
Technical certificate	0%	0%	0%	0%	9%	0%
University graduate	0%	0%	0%	0%	21%	0%
Master's or Equivalent	0%	0%	0%	0%	15%	0%
Doctoral or Equivalent	0%	0%	0%	0%	2%	0%
Germany Only_Which of the following best describes your gross annual household income for 2018						
Less than 13,000€	0%	0%	0%	0%	5%	0%
13,000€ - 17,999€	0%	0%	0%	0%	7%	0%
18,000€ - 24,999€	0%	0%	0%	0%	12%	0%
25,000€ - 34,999€	0%	0%	0%	0%	20%	0%
35,000€ - 49,999€	0%	0%	0%	0%	23%	0%
50,000€ - 89,999€	0%	0%	0%	0%	22%	0%
90,000€ or higher	0%	0%	0%	0%	6%	0%
Prefer not to answer	0%	0%	0%	0%	5%	0%
China Only_Do you live in a						
City or urban area	0%	0%	0%	0%	0%	98%
Village or rural area	0%	0%	0%	0%	0%	2%
China Only_Which of the following best describes the highest level of education you have completed						
Primary school, secondary school or vocational training	0%	0%	0%	0%	0%	5%
University, bachelor's degree	0%	0%	0%	0%	0%	75%
Post-graduate, master's, doctorate	0%	0%	0%	0%	0%	20%
China Only_Which of the following best represents your total monthly household income						
Less than ¥3,000 per month	0%	0%	0%	0%	0%	1%

¥3,000 - ¥4,999 per month	0%	0%	0%	0%	0%	2%
¥5,000 - ¥6,999 per month	0%	0%	0%	0%	0%	4%
¥7,000 - ¥8,999 per month	0%	0%	0%	0%	0%	6%
¥9,000 - ¥10,999 per month	0%	0%	0%	0%	0%	9%
¥11,000 - ¥12,999 per month	0%	0%	0%	0%	0%	12%
¥13,000 - ¥14,999 per month	0%	0%	0%	0%	0%	18%
¥15,000 per month or more	0%	0%	0%	0%	0%	47%
Prefer not to answer	0%	0%	0%	0%	0%	1%