Connected People Change the World

A Research Companion

Lenovo

Contents

Executive Summary

Lenovo creates technology products and solutions for customers in more than 160 countries around the world. Innovations in emerging areas like Artificial Intelligence (AI), 5G and big data, are shaping how we interact with our world. We call this Intelligent Transformation.

By harnessing the power of these transformational technologies, we're working to bridge individual differences and build communities of shared identity.

To innovate for a truly global customer experience and to drive Lenovo's business transformation, we employ a unique blend of talent from a variety of genders, orientations, nationalities, and ethnicities that are reflective of the world we serve. Lenovo has always pursued a path of inclusion, and our own diversity has helped us innovate better, faster, and more creatively.

To further inform our approach to diversity and inclusion (D&I), we conducted research across critical markets representative of our employee base to measure external attitudes on the status and future of D&I and the role that technology plays in its advancement.

There is more work to be done globally to meet basic expectations and to define D&I in a more relevant way within today's society. As cultures are diverse, so too are their definitions of D&I - we found no universally agreed upon definition for diversity or inclusion, but we did find a universally recognized need for a greater equality in share of voice, and an increasingly stable structure for fostering feelings of inclusion and belonging in all facets of society. We believe that inclusion, and being inclusive in the workplace, represents the evolution of D&I, as evidenced by the rising values of belonging, equality, helpfulness, and social responsibility shown in our research.

Among our key findings, D&I ranks high in importance, with the technology sector identified as a positive catalyst for change in the D&I space. Technology represents the intersection of humanity and equality, where technology can change lives for the better.

Objectives & Methodology

In June 2018, Lenovo conducted a comprehensive primary research survey to explore, examine, quantify, and report on perceptions on diversity and inclusion in key countries. The Lenovo Diversity & Inclusion (D&I) Research Study was conducted as an online survey questionnaire. The survey featured demographic identifier questions before diving into a series of questions regarding the participants' general outlook and opinion on D&I in general, their attitudes on D&I in the workplace, and sentiments surrounding D&I as it pertains to the technology industry.

The target audience was a nationwide, general population sample, limited to ages 18 and older, with a suggested sample size of n=1,000 participants per market across five major global markets: the U.S., the U.K., Germany, Brazil, and China. These five markets represent the home countries of 73 percent of Lenovo's workforce.

	U.S.	U.K.	China	Brazil	Germany
Sample size	n = 1,205	n = 1,011	n = 1,015	n = 1,027	n = 1,009

The survey was fielded June 23, 2018 through June 29, 2018. In total, 5,267 surveys were completed and reported at a 95 percent confidence level, with a margin of error of +/- 3 percentage points per country.

Top Line Findings

Among the many insights collected through the survey, one theme prominently emerged:

Diversity and inclusion (D&I) is highly valued around the world, and the technology industry is perceived as one of the top sectors for advancing the conversation and enhancing global perspectives.

Emerging importance

On the whole, the participants collectively identified D&I as an important global issue. When asked how much they value D&I in their own lives, respondents universally agreed upon a high valuation, with the highest mark "value a great deal" ranking highest in response.

How much do you value diversity & inclusion in your own life – in your personal and work interactions? *

	U.S.	U.K.	China	Brazil	Germany
Value a great deal	54%	41%	51%	76%	33%
Value somewhat	24%	28%	37%	18%	25%
Value a bit	10%	17%	9%	3%	27%
Don't really value much	6%	7%	3%	2%	8%
Don't value at all	5%	7%	n/a	2%	7%

*Disclaimer: Not all numbers add up to 100 due to rounding.

Participants cited a number of concrete benefits resulting from D&I, including mutual understanding and better interactions between communities, social harmony, enhanced creativity, and opportunity for new ideas brought forth by diverse perspectives, and the ability to learn and share knowledge with individuals from various backgrounds.
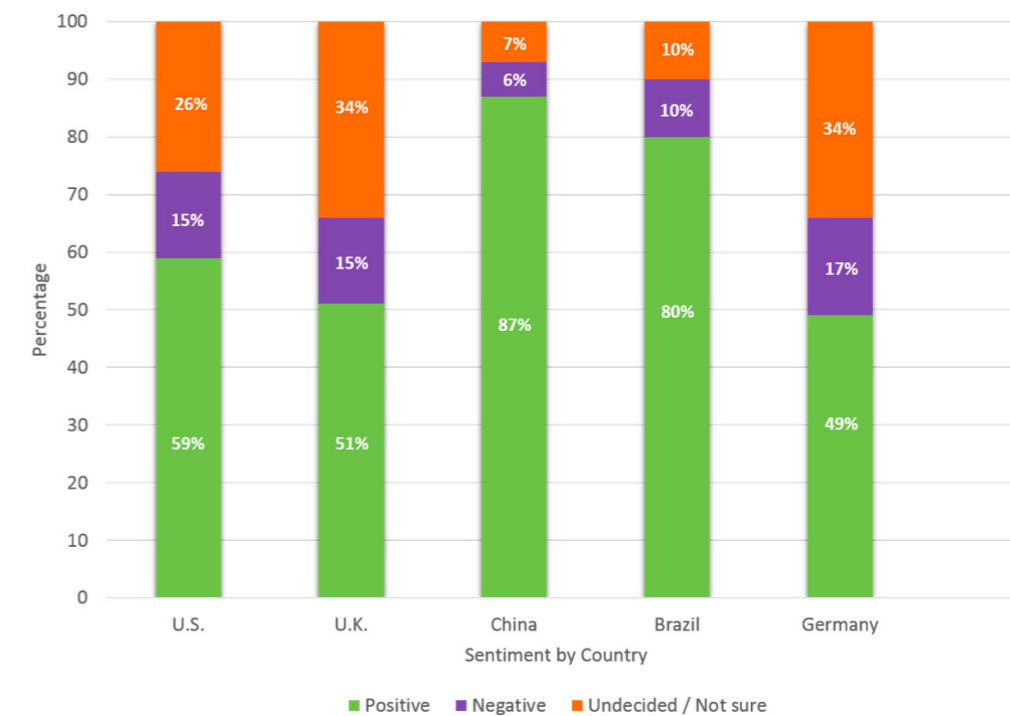
Room to improve

While prominent among social issues, respondents indicated that there's room for growth and advancement in the D&I space. When asked how well they think society is doing in making progress on D&I today, many respondents feel that society still has "a long way to go."

With regard to making progress on diversity & inclusion today, how well do you think society, in general, is doing?

	U.S.	U.K.	China	Brazil	Germany
We're making progress and we're getting there.	18%	19%	26%	12%	9%
We're making progress, but we still have a long way to go.	38%	41%	54%	47%	39%
We're not really making that much progress.	16%	20%	10%	22%	27%
We are not making any real progress, or we may actually be going 'backwards' on this issue.	21%	13%	9%	17%	19%
I don't think any progress needs to be made on this issue.	7%	7%	1%	3%	7%

Technology leads the way

When asked if they believe that technology, both current and emerging, plays a positive or negative role in D&I, participants across all markets indicated that technology's role is overwhelmingly positive.

Sentiment by Country — Positive / Negative / Undecided / Not sure

	Positive	Negative	Undecided / Not sure
U.S.	59%	15%	26%
U.K.	51%	15%	34%
China	87%	6%	7%
Brazil	80%	10%	10%
Germany	49%	17%	34%

Diversity & Inclusion in Daily Life

Defining D&I

With a diverse sample audience comes diverse interpretations – on the whole, participants across the five markets varied in their definitions of diversity and inclusion (D&I), but they indicated that the concept of D&I is a universal priority.

Several common themes emerged:

- Many respondents cited equal opportunity for and treatment of people despite differences in gender, race, sexuality, and ability
- Respondents in different countries referenced local trending political/economic issues – segregation in the U.S., immigration in the UK, refugees in Germany, and globalization in China

D&I in Society

We provided participants a definition of D&I to utilize for the next set of questioning:

Diversity & Inclusion is the idea that in our society, in our workplaces, in our schools, etc. – people of various backgrounds and identities (race / ethnicity, gender, age, sexual orientation , religion, national origin, physical abilities, etc.) should be able to feel comfortable, participate, contribute, and feel a sense of belonging – feeling that they are respected, empowered, and valued regardless of their identity.

With a concrete definition provided, we then asked participants to indicate how important they viewed D&I overall in today's society. The majority of respondents in each of the five markets indicated that D&I was of importance to their respective regions.

In your opinion, how important do you think diversity and inclusion is, overall, in our society today?

	U.S.	U.K.	China	Brazil	Germany
Extremely important	50%	39%	56%	70%	33%
Very important	29%	34%	37%	21%	38%
Somewhat important	14%	19%	6%	6%	21%
Not that important	4%	4%	1%	1%	4%
Not at all important	3%	4%	1%	2%	5%

Diversity & Inclusion in the Workplace

As global values around diversity and inclusion (D&I) continue to shift, employers are responding, but our research shows that many citizens still regard D&I in the workplace as an area that needs improvement.

D&I matters in the workplace

The role of D&I in the workplace is to encourage an atmosphere where employees feel recognized, valued, and empowered to bring their whole selves to work each day – regardless of their background.

When asked if they value a diverse and inclusive workplace, respondents affirmed that they do, in fact, value it to varying degrees.

In general, how much do you value a diverse and inclusive workplace?

	U.S.	U.K.	China	Brazil	Germany
Value a great deal	55%	43%	44%	78%	38%
Value somewhat	24%	26%	37%	14%	24%
Value a bit	14%	18%	14%	4%	26%
Don't really value much	3%	7%	3%	1%	7%
Don't value at all	4%	6%	2%	2%	5%

Futhermore, we were encouraged to learn that a number of respondents feel that they are routinely included in their workplace atmospheres and enjoy a sense of belonging. We did, however, identify some markets where opportunity exists for growth and development of programs, policies, or practices that would help to encourage a greater sense of inclusion.

Overall, do you generally feel included and feel a sense of belonging in your workplace?

	U.S.	U.K.	China	Brazil	Germany
Feel included most of the time	52%	47%	41%	53%	45%
Feel included some of the time	33%	28%	45%	34%	22%
Rarely feel included	8%	12%	9%	8%	22%
Do not feel included at all	4%	7%	3%	3%	5%
Don't know / not sure	3%	6%	2%	2%	6%

Employers as leaders

In terms of viewing their employers as proponents for advancing D&I, most respondents reported that their employers are "middle of the pack", rather than identifying as "leaders" in the space.

Thinking about diversity and inclusion in your workplace, how good of a job do you think your employer is doing compared to other workplaces?

	U.S.	U.K.	China	Brazil	Germany
My employer is a leader	48%	41%	34%	31%	23%
My employer is middle of the pack	45%	51%	54%	55%	62%
My employer is falling behind	7%	8%	11%	13%	15%

The U.S. is the only country where a slight plurality of respondents think their employers are leaders in the D&I space.

Building a diverse pipeline of talent

With evidence supporting values of diversity and inclusion in the office, and identified room for growth in terms of enhancing employer's position as leaders in the D&I space, it's apparent that adopting practices for developing and building a pipeline of diverse talent for future generations is imperative – and respondents agree.

When asked to weigh in on the importance of a company's focus on D&I when recruiting, hiring, and promoting its employees, the majority of respondents confirmed that a D&I focus is important to varying degrees.

How important is it for a company to promote diversity and inclusion when recruiting, hiring, and promoting employees?

	U.S.	U.K.	China	Brazil	Germany
Extremely important	53%	40%	43%	69%	39%
Very important	25%	26%	40%	20%	22%
Somewhat important	13%	22%	15%	7%	25%
Not that important	3%	6%	1%	1%	7%
Not at all important	6%	6%	1%	2%	7%

Diversity & Inclusion in Tech

As stated in the top line findings, there is a clear emphasis on the importance of technology in the area of Diversity & Inclusion (D&I), but the research shows that the technology industry at present has some room for improvement in the ranks of industries around the world that are currently performing very well with regards to D&I.

Technology's role in D&I

The transformational power of technology, in and of itself (products, services, connectivity, etc.), is recognized broadly as also having a potential significant positive impact. Operating on the premises of new and emerging products, the growing use of algorithms and A.I. and the talent behind these creations, technology resonated as a powerful catalyst for positive impact among our respondents.

When it comes to technology, do you think each of the following is having a positive or negative impact on diversity and inclusion?

New and emerging technology products and services

	U.S.	U.K.	China	Brazil	Germany
Positive	64%	55%	89%	83%	59%
Negative	15%	14%	6%	10%	18%
I'm not sure	21%	31%	5%	7%	23%

Social Media and Social Networks

	U.S.	U.K.	China	Brazil	Germany
Positive	55%	48%	81%	78%	48%
Negative	31%	30%	14%	17%	33%
I'm not sure	15%	22%	4%	5%	19%

Algorithms / Artificial Intelligence

	U.S.	U.K.	China	Brazil	Germany
Positive	53%	47%	87%	78%	50%
Negative	19%	17%	7%	13%	24%
I'm not sure	27%	36%	6%	10%	25%

The type of talent that technology companies are hiring

	U.S.	U.K.	China	Brazil	Germany
Positive	62%	55%	86%	80%	54%
Negative	16%	14%	8%	11%	21%
I'm not sure	22%	30%	6%	9%	25%

Digging deeper into the view that technology is a positive force for D&I, many respondents noted that technology can help to bring people together in everyday life, and help to "level the playing field" between individuals in certain environments. A number of respondents noted that technology can assist those with disabilities and help foster new opportunities for those who may have been previously marginalized or disenfranchised.

Additionally, respondents credited technology with helping to foster an overall sense of belonging in society in general in the last decade.

Do you think that advances in technology over the past 5-10 years have made society in general more inclusive or less inclusive overall?

	U.S.	U.K.	China	Brazil	Germany
More inclusive	54%	45%	83%	81%	46%
Less inclusive	10%	12%	4%	6%	9%
Neither more nor less inclusive	36%	43%	13%	13%	45%

How tech companies measure up

Compared to other fields, the sentiment on how well the technology sector is performing varies between geographies. China and Brazil demonstrate the most optimism for the technology industry, ranking it high among the comparable sectors. However, Western markets like the U.S., U.K., and Germany rank the technology industry somewhere in the middle of the field, falling just behind education fields and non-profit industries. This demonstrates a clear opportunity for improvement for the technology industry.

U.S.

Schools / Universities	68%
Non-profits	66%
Technology industry	66%
Media	57%
Private Sector	53%
Society in general	50%
Government / Public Sector	47%

U.K.

Schools / Universities	68%
Non-profits	58%
Media	57%
Technology Industry	57%
Society in general	57%
Government / Public Sector	54%
Private Sector	49%

Brazil

Non-profits	67%
Technology Industry	64%
Media	62%
Schools / Universities	61%
Private Sector	53%
Society in general	46%
Government / Public sector	36%

China

Technology industry	81%
Schools / Universities	80%
Non-profits	75%
Society in general	72%
Media	71%
Government / Public Sector	70%
Private Sector	65%

Germany

Schools / Universities	56%
Non-profits	54%
Technology Industry	48%
Private Sector	48%
Media	46%
Society in general	40%
Government / Public sector	41%

Communicating D&I Success

As societies continue to turn their focus toward enhancing a greater sense of social justice, its important for companies who are making the effort to communicate these actions effectively to their audiences.

We asked respondents how employers, like tech companies, can demonstrate and communicate positive stories of progress regarding D&I. Interestingly, respondents in the U.S., U.K., and Germany highly value knowing how satisfied employees are across differeng groups, and not just by sheer numeric representation of diversity – a clear nod toward the increasing value of inclusion as a complement to diversity.

Which of the following would you most want to hear from a company about what they are doing for diversity & incusion? (top three responses)

U.S.
Statistics about employee satisfaction by age, gender, ethnicity, etc.
Percentage of overall workforce representing diverse backgrounds
Commitment to compensation parity across gender, ethnicity, etc.

U.K.
Statistics about employee satisfaction by age, gender, ethnicity, etc.
Being featured in "best places to work" lists, targeted toward people of diverse backgrounds
Percentage of overall workforce representing diverse backgrounds

China
Commitment to compensation parity across gender, ethnicity, etc.
Statistics about employee satisfaction by age, gender, ethnicity, etc.
Retention rates based on employee background (age, gender, ethnicity, etc.)

Germany
Being featured in "best places to work" lists, targeted toward people of diverse backgrounds
Commitment to compensation parity across gender, ethnicity, etc.
Statistics about employee satisfaction by age, gender, ethnicity, etc.

Brazil
Statistics about employee satisfaction by age, gender, ethnicity, etc.
Percentage of overall workforce representing diverse backgrounds
Retention rates based on employee background (age, gender, ethnicity, etc.)

In addition to quantitative metrics, respondents indicated a desire to hear more qualitative, contextualized stories about how D&I affect the internal culture and positive outcomes within a company.