

WORK FOR *humankind*

Global Research Report

*Work from Home is the present,
Work for Humankind is the future*

INTRODUCTION: A HUMAN TRUTH

In a time of great hardship and adversity, a change has emerged providing a newfound freedom for people throughout the world. Despite our challenging times, people are finding connection through technology.

As a brand devoted to keeping people connected through hardware, software and services solutions, Lenovo had an intuition that these circumstances were due to the growing “Work from Anywhere” mindset.

Over the last 20 months, remote workers have demonstrated an ability to work effectively and efficiently with the right technology and support. In fact, we are beginning to understand the profound positive benefits of a remote and hybrid workforce on society, culture, and humankind.

Work For Humankind

Workers in our survey are open and interested in experiencing the benefits of “Working from Anywhere” and see “Work for Humankind” as a force for goodwill.

While not everyone shares this mindset, we believe the message is clear: the majority of respondents crave the freedom and flexibility to “Work from Anywhere.” The question is, what exactly does that mean – for employees, for employers, and for society? To find out, Lenovo conducted a survey of more than **15,000 respondents** across **10 international markets**.

And now, with our Work for Humankind global research study, we have some answers.

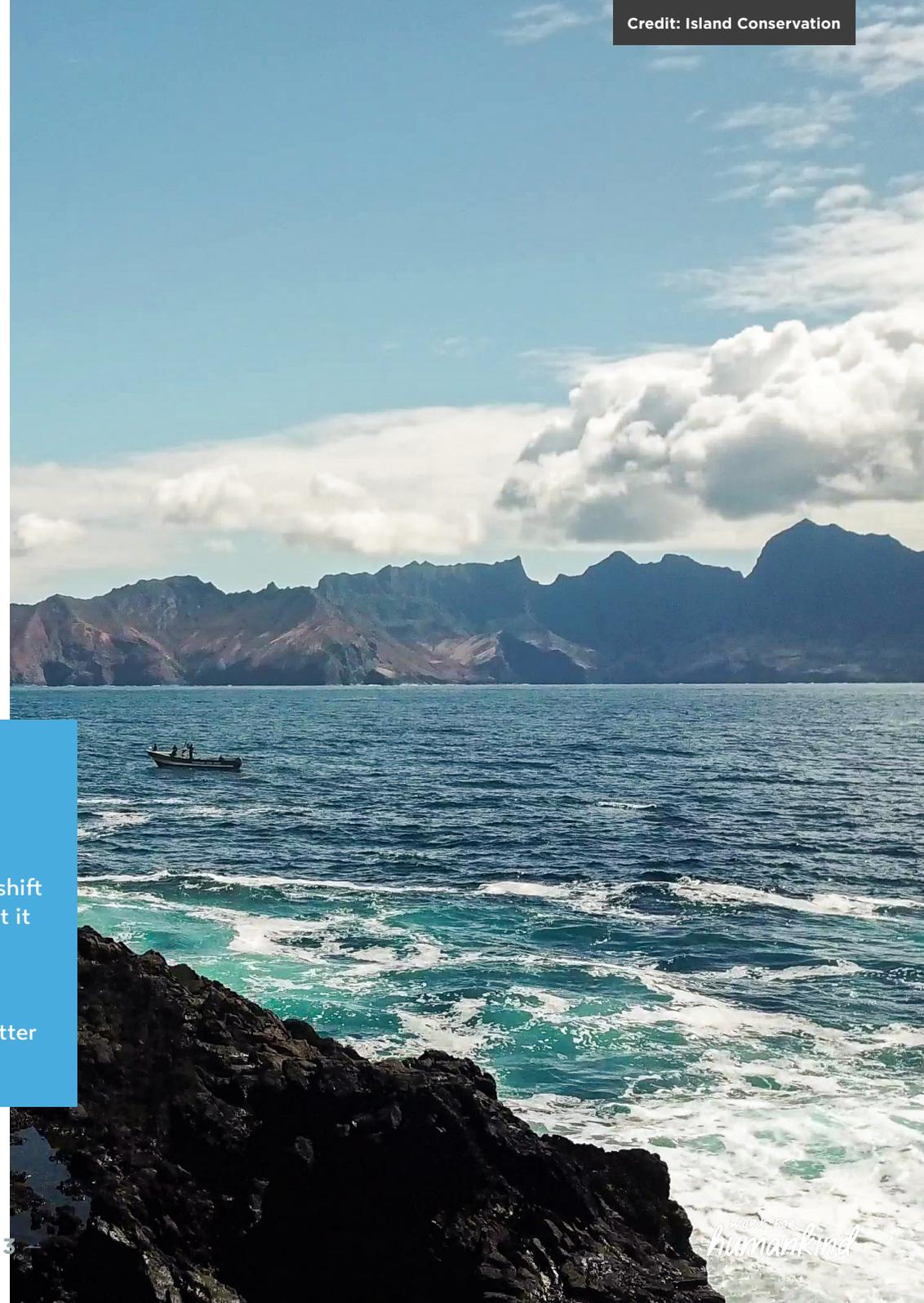
What we’ve learned about the “Work from Anywhere” mindset shows the essential connective tissue between where people work and how people work. This intersection can optimize personal and professional performance – as well as doing good in the world – for those who are eager and willing to embrace it.

Toward a Human Truth

This is the moment for Work for Humankind:

1. In the past, the technology didn’t allow for a universal remote work shift
2. Corporate mentality didn’t have the imagination or faith to support it
3. Employees didn’t demand it or feel empowered to do it

So why now? The past 20 months have shown us that we have the technology and connectivity to work effectively and efficiently no matter where we are in the world.



METHODOLOGY AND APPROACH

Audience

Tech Savvy Adults aged 18+ employed full-time, part-time, or are actively looking for work

Method

Data Collection Mode: Online Survey

Dates: 9/1-9/21

Markets



Generations

Gen Z = 18-25

Gen X = 44-56

Millennials = 26-43

Matures = 57+

Margin of Error

Margin of Error for overall sample is $\pm < 1$ percentage point (at a **95% confidence level**)

Margin of Error for individual market samples is ± 3 percentage points (at a **95% confidence level**)



STATE OF WORK: A TRANSFORMATION

Following a volatile and unprecedented 20-plus months, global respondents are emerging with a general sense of satisfaction and optimism toward their work lives - including the technology they use - with an even greater focus on flexibility.

They overwhelmingly acknowledge that Covid-19 has fundamentally upended the what, when, where and how paradigm of work, and what this means for employers and employees going forward.

State of work: Key takeaway:

While Covid-19 has caused fundamental changes to work as we know it, there is satisfaction with work life and technology.

Work environment

Among respondents, not everyone agrees on the best work situation, which has implications for global businesses.

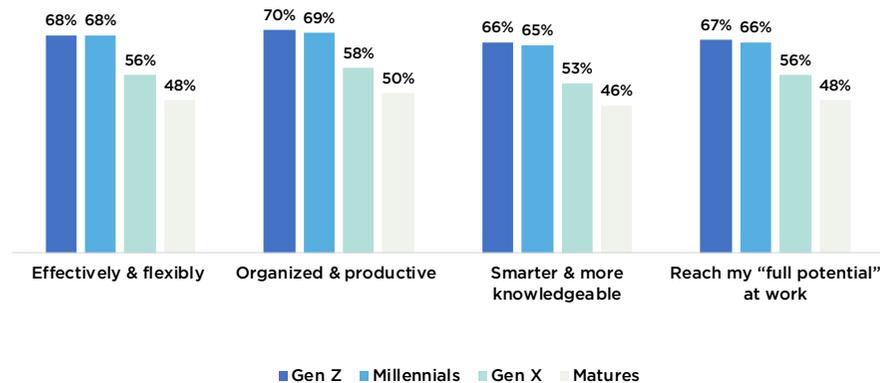
- Remote most/all the time: U.S. and Brazil prefer it most (both 29%) while respondents in China (11%) and Japan (13%) are least enthusiastic.
- Hybrid: Mexico (52%) and China (54%) prefer it most, while the U.S. (30%) and Germany (35%) prefer it the least.
- In person all/most the timer: Germany (47%) and Japan (51%) like face-to-face most, while Mexico and Brazil like it least (both 23%).

Most respondents prefer to be in either a fully remote or hybrid environment. However, there are variations across markets and generations. Respondents in Mexico, Brazil, India and the US, for example, tend to be more enthusiastic about remote work, while those in Japan, Germany, France and Italy expressed greater interest in returning to an office or job site. Our research found that Gen Z and Millennials are more likely to prefer hybrid or full-time remote working, compared to Gen X and Matures who enjoy and prefer the benefits of the office.

Interestingly, respondents working in a hybrid or remote environment seem to be more optimistic than those who are working in-person most or all the time.

Impact of Technology

Despite an overall positive outlook on the impact of technology, Mature and Gen X workers think technology is not as helpful in making them smarter or allowing them to reach their full potential at work.



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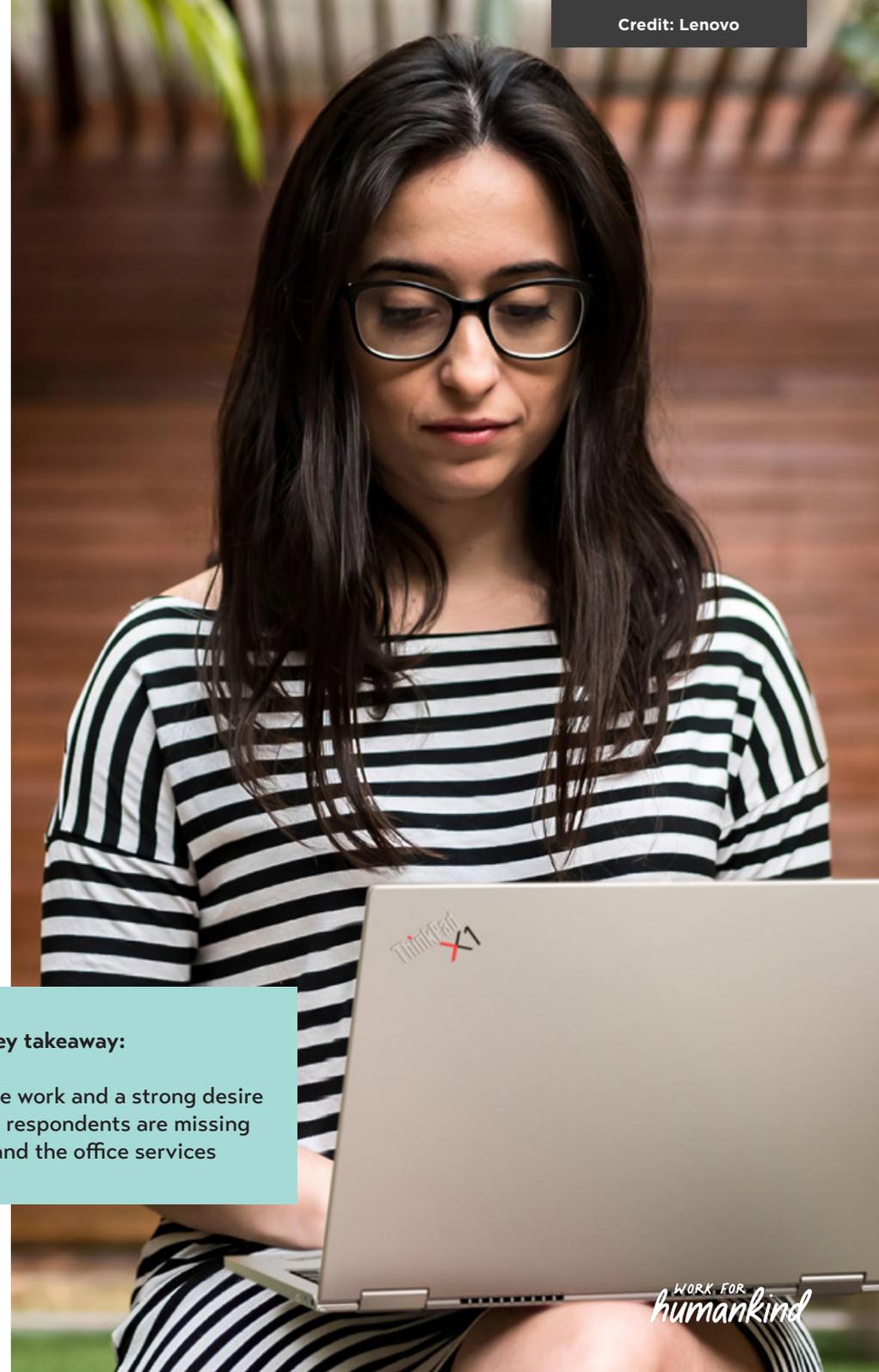
REMOTE WORKING: A NEW NORMAL IS IN PLACE

When asked about their remote working experiences, respondents across all generations say they feel more inspired, productive, and creative, with an improved work/life balance. Additionally, **85% of respondents** say they have more control over their schedule when working remotely.

However, respondents miss seeing and collaborating with work colleagues in the office, as well as having the technology support available to them while working in-person.

Remote working: Key takeaway:

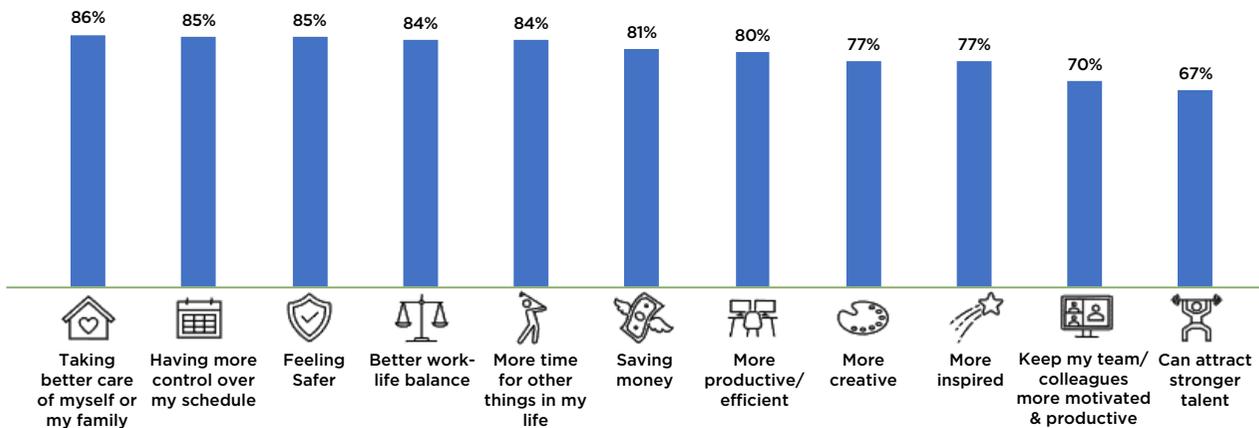
There are major benefits to remote work and a strong desire for flexibility going forward, but respondents are missing office camaraderie, support and the office services





Benefits of Working Remote

Respondents were asked about their experiences working remote and the potential benefits.



Employees are reframing and re-evaluating their relationship with work. Covid-19 has brought changes to employees' work lives that they would like to maintain moving forward – chiefly, the desire for workplace flexibility and autonomy.

The “hybrid” model is the most appealing way to work for respondents in our survey given the perceived benefits of this approach, among them: greater control over their schedule, better work/life balance, increased inspiration, motivation, productivity, and financial savings.

There is a generational gap, however. Older workers are more likely than younger ones to favor returning to the office, while younger generations are keener to buck the protocols of the past. **47% of Matures** said they would prefer to be in person at a job site most of the time (compared to **34% of Millennials**), with **45% of Millennials** saying they would prefer a hybrid environment (compared to **31% of Matures**).

And while employees across the surveyed markets have a desire for flexible schedules to become permanent, they do miss the fundamental sense of belonging, IT support, community, and collaboration fostered in an office type environment.

83% agree that Covid-19 has accelerated the work flexibility and remote work trend by at least several years.

Respondents overall also say remote work has some drawbacks, too..

By the generations, who misses what most?

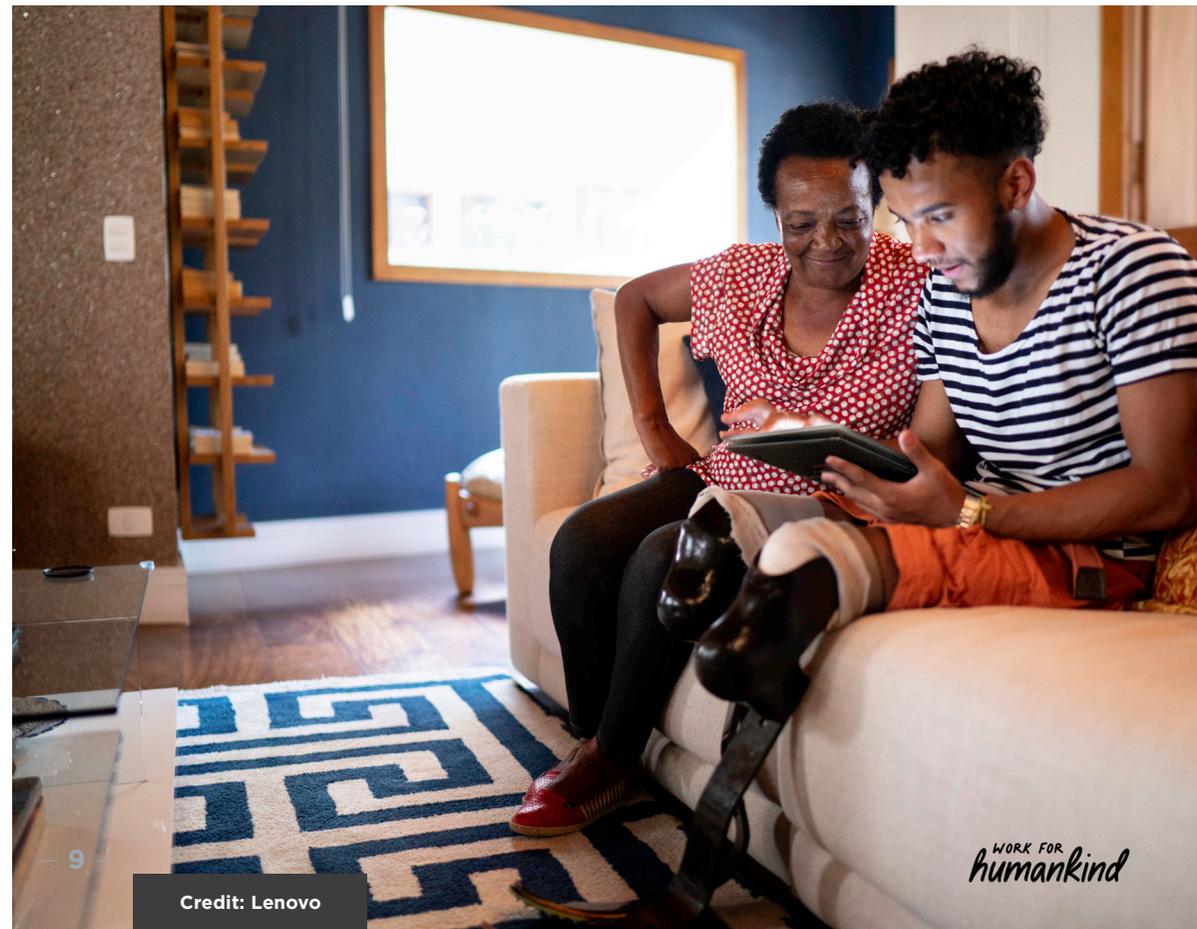
- I miss seeing **my work friends/colleagues**: Gen X and Matures tied (46%)
- I miss feeling **supported/connected** to colleagues and the company: Gen Z (40%) and Millennials (38%)
- I miss **social events** at work or with work colleagues: Millennials (38%) and Gen Z (36%)
- I miss the **technology/tools** that are available at the office/job site: Millennials (39%) and Gen Z (38%)
- I miss **in-person meetings**, working sessions, etc.: Millennials (35%) and Gen Z (33%)

By market, who misses what most?

- I miss seeing **my work friends/colleagues**: Brazil (57%) and India (49%)
- I miss feeling **supported/connected** to colleagues and the company: India (46%) and China (44%)
- I miss **social events** at work or with work colleagues: India and China tied (50%)
- I miss the **technology/tools** that are available at the office/job site: India (53%) and China (47%)
- I miss **in-person meetings**, working sessions, etc.: India (50%) and Mexico (41%)

More than 80% of respondents – no matter their generation or location – feel working remotely has its benefits

- I can take better care of myself/my family
- I have more control over my schedule
- I feel safer
- I have better work/life balance
- I have more time for other things in my life



WORK FROM ANYWHERE: BRING IT ON

Respondents, particularly **Gen Z (68%)**, are open to the prospect of “Work from Anywhere” and see a lot of value in this experience. **16% of Gen Z** said they would “Work from Anywhere” indefinitely.

However, the desire to get out of their regular workspaces doesn't necessarily mean employees are heading to traditional “postcard” locations – beaches, ski chalets, etc. Putting themselves in the right frame of mind to succeed at work is more important than that.

“Work from Anywhere” defined

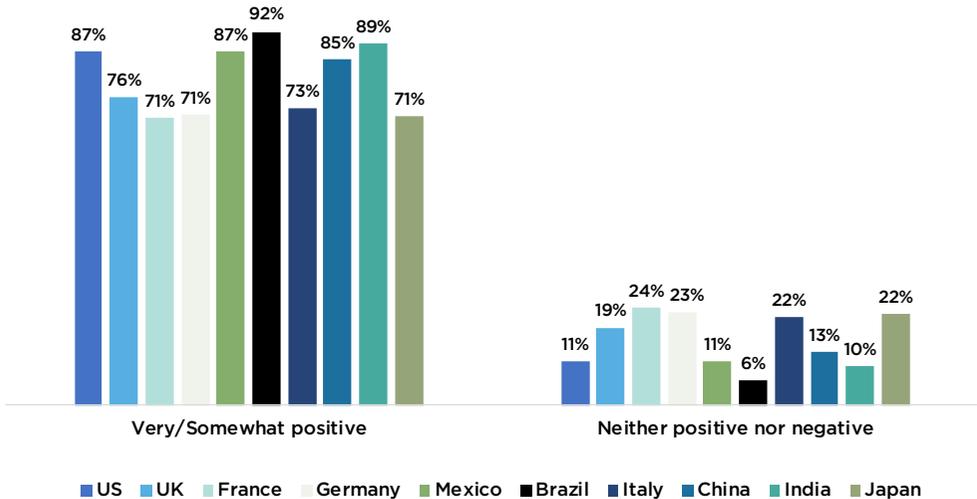
It's not only about working at your kitchen table or an edgy shared workspace down the block.

It's a form of work flexibility that allows employees to work from locations outside of their “home area,” including far away and remote locations. This could be an area in another part of one's country or a different country altogether.



Work from Anywhere: Experience

Respondents who had a prior “Work from Anywhere” experience view it positively overall across markets and generations.



In fact, **43% of overall respondents** say they would prefer an environment that is quiet or relaxing. **56% of Gen Z** and **65% of Matures** agree. That said, while they may want to feel the energy from an urban setting, it may not be in the city where they already are living. Location is important, but so is putting themselves in the right headspace to be more motivated, inspired, creative and productive.

Critically, respondents recognize that “Working from Anywhere” offers a bevy of benefits personally and professionally. More than three quarters of respondents also say it would improve their personal relationships.

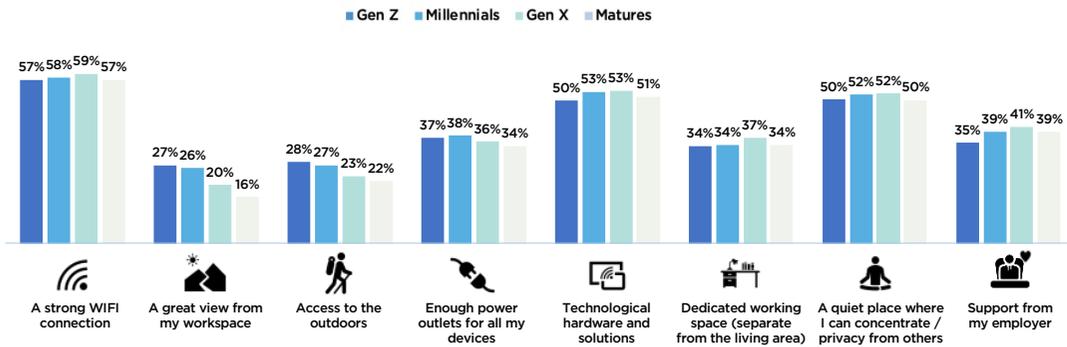
Because respondents have the desire to positively contribute to the communities where they are working, there is potentially a dual benefit on their own lives as well as on the communities where they choose to work.

Work from Anywhere: Key takeaway:
 There is interest and openness to “Work from Anywhere.” Respondents listed major perceived benefits for personal lives, society, local community, employers, and employees.

Credit: Island Conservation

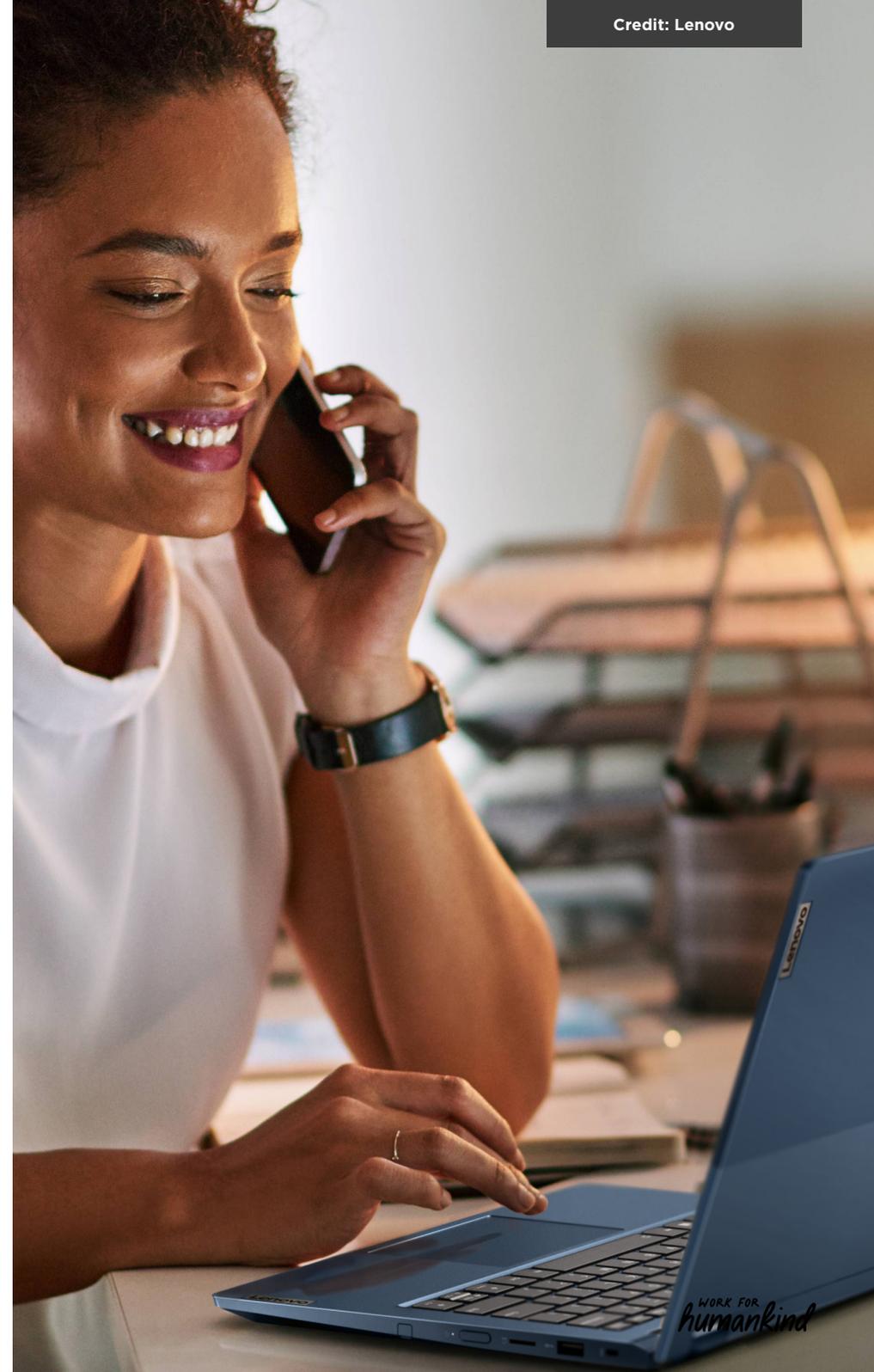
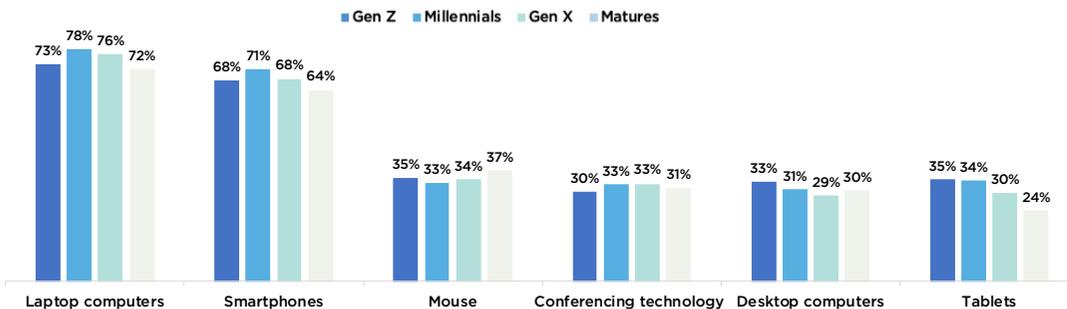
Work from Anywhere: Must Haves

Respondents indicate that a strong WIFI connection, a quiet place, and technology & hardware solutions were most essential for a successful and productive “Work from Anywhere” experience.



Work from Anywhere: Must Have Technology

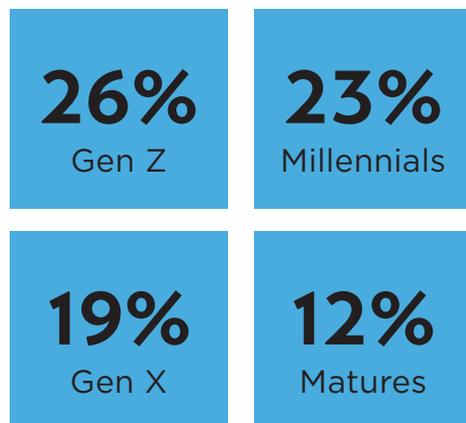
“Which of the following would you consider essentials or “must-haves” during a “Work from Anywhere” experience?”



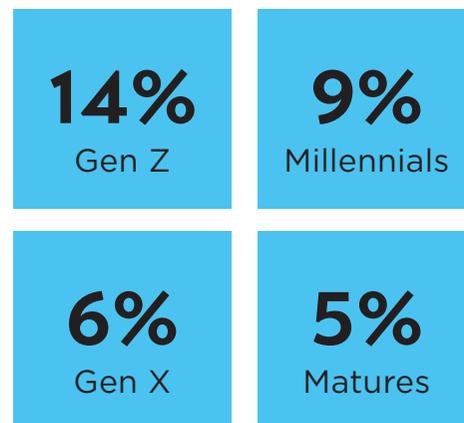
Although **most respondents (63%)** are open to “Work from Anywhere,” many say they do not have organizational support to do so, leading to negative sentiments amongst some workers.

Respondents who have not been able to “Work from Anywhere” feel...

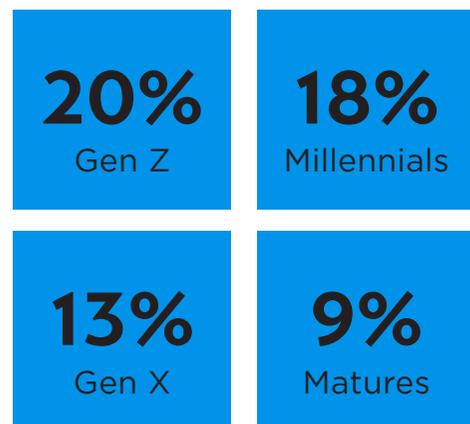
Disappointed



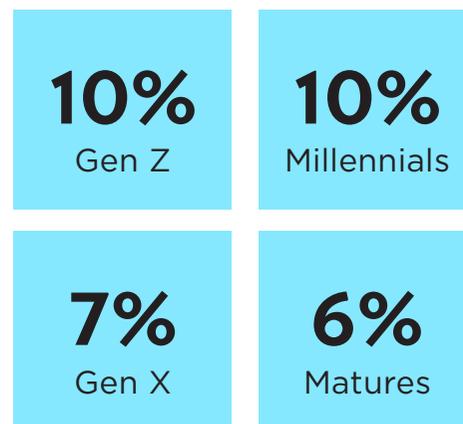
Underappreciated



Frustrated



Undervalued



“Work from Anywhere” offers forward-thinking companies an opportunity to utilize existing technologies to boost employee fulfillment.



WORK FROM ANYWHERE: BENEFITS AND CHALLENGES

Respondents indicated that “Work from Anywhere” could benefit both their personal and professional lives, and that they would be open to sacrificing some of life’s pleasures for this experience.

However, Gen Z and Millennials consistently see greater “Work from Anywhere” benefits than Gen Xers and Matures, with significant variation when it comes to increased motivation, creativity and inspiration. **41% of Gen Z and Millennials** say they would be more motivated while only **30% of Matures** agree.

“Work from Anywhere” Key takeaway:

Current and emerging technology is the linchpin to enable and empower “Work from Anywhere” with strong favorability towards tech companies that make it happen.

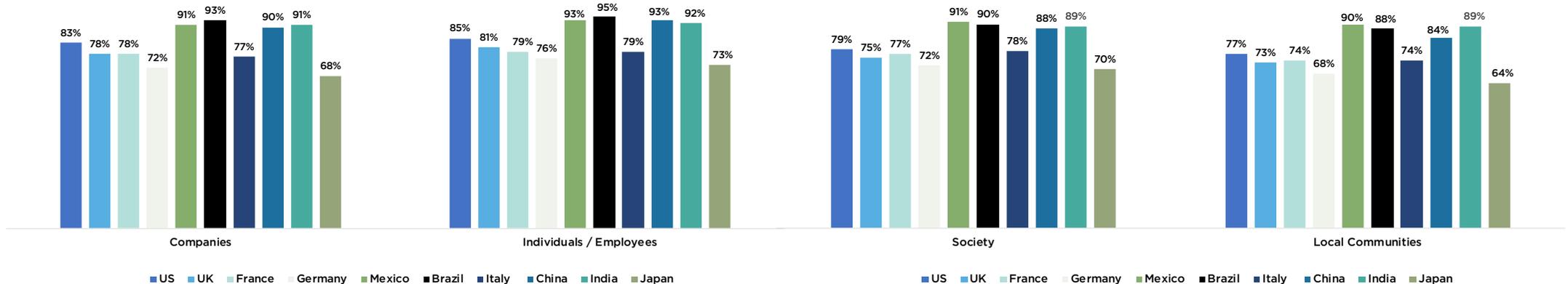


61% of respondents also believe it's important to give back and contribute positively to the communities they are visiting, though there is significant variation across markets. They envision a reciprocal relationship that benefits their own lives while simultaneously improving the community they are visiting. Notably, **Gen Z (68%)** and **Millennial (67%)** respondents feel it is more important than their **older counterparts (Gen X, 55%)** to give back to their "Work from Anywhere" location.



"Work from Anywhere": Who Benefits

"Working from Anywhere" is beneficial for...



In addition, nearly **80% of all respondents** believe that modern technology and tech companies are the backbone of a successful “Work from Anywhere” experience and critical to turning this trend from “novel” to “normal.”

In fact, more than **70% of respondents** say they would have a highly favorable view of a tech company that could enable “Work from Anywhere” and help to identify ways to give back and make a positive impact in that location.

And while **majority of respondents (69%)** agree that the right technology currently exists to facilitate a positive “Work from Anywhere” experience, **nearly 80%** say they are even more excited about the prospect of new technologies making it even easier.

If given the chance of “Working from Anywhere”, I would be...

38%

More motivated

36%

More productive

34%

More creative

34%

More inspired

27%

More open to new technologies for work

43%

Less stressed

“Working from Anywhere”, is beneficial for...

81%

Society

85%

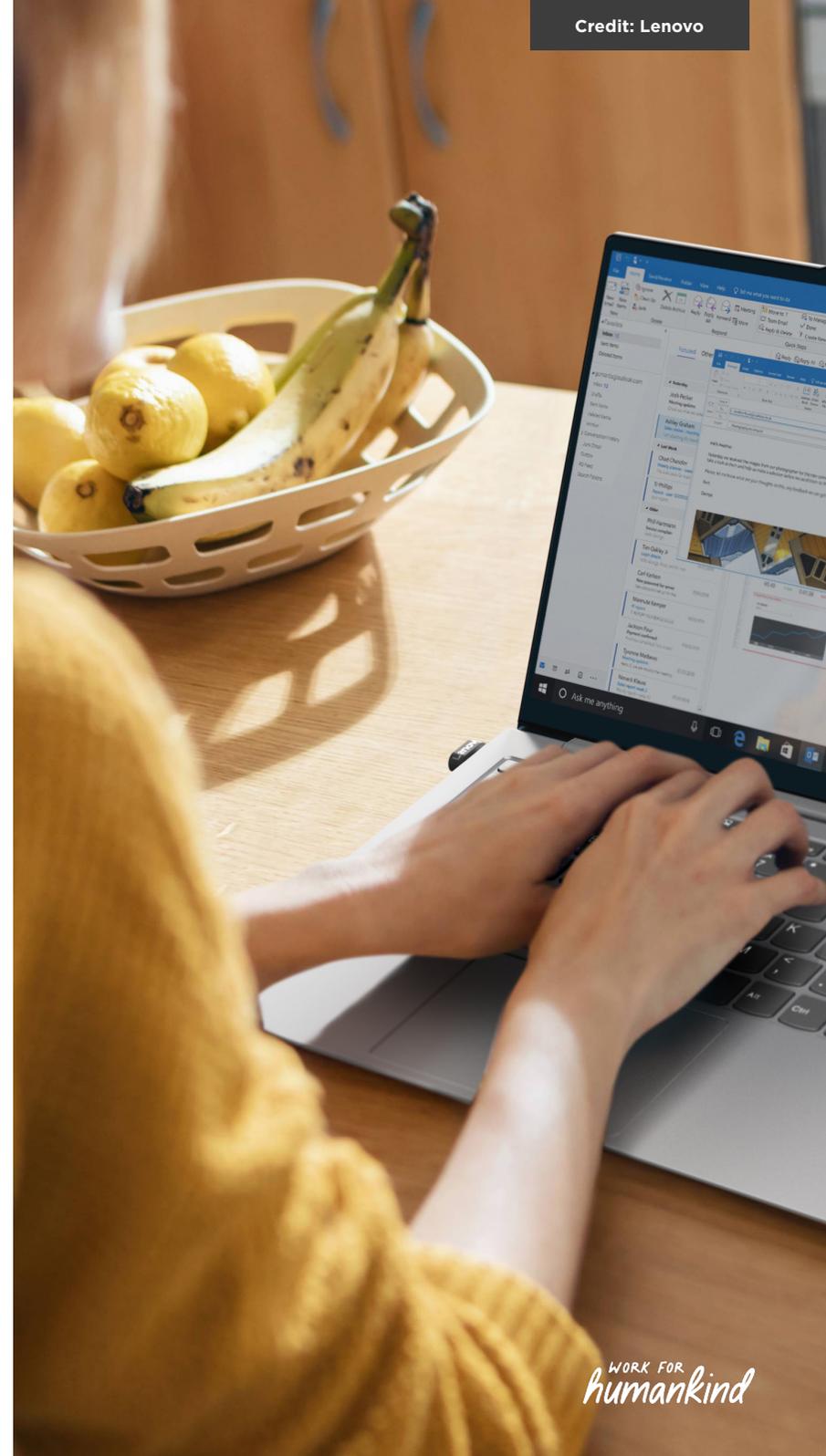
Employees & Individuals

82%

Employers

78%

Local Communities



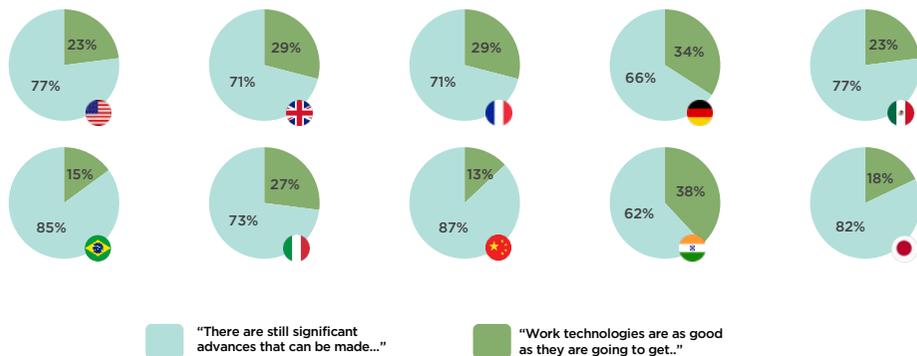
THE FUTURE OF “WORK FROM ANYWHERE”: TECHNOLOGY-EMPOWERED

While advancements in technology have transformed the way we work, further innovation could make the “Work from Anywhere” experience even simpler and therefore potentially more enjoyable.

While **69% of respondents** say the right technology currently exists to enable people to “Work from Anywhere,” **75% say** there are still significant advances to be made by tech companies to enable them to do so even more successfully. Unsurprisingly, younger respondents are more excited by this.

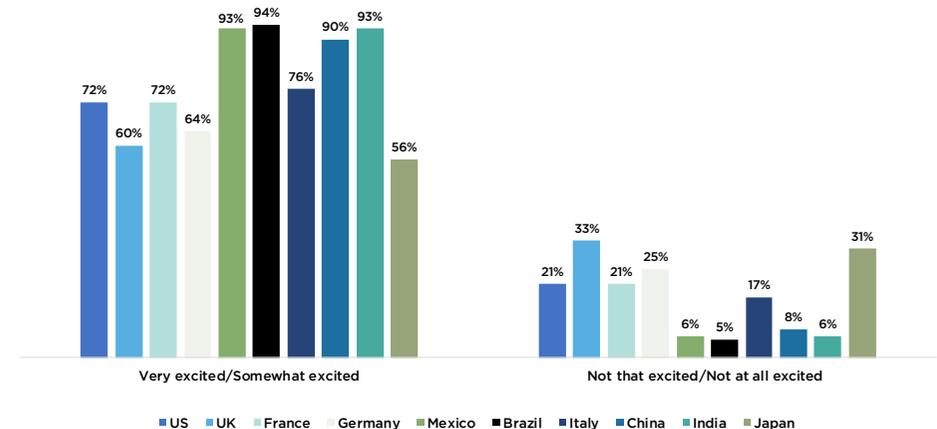
Work Technology: Now & in the Future

“Which of the following comes closest to your view?”



Technology & “Work from Anywhere”: Excitement for the Future

“How excited are you about new technologies that will make it easier to “Work from Anywhere” effectively?”



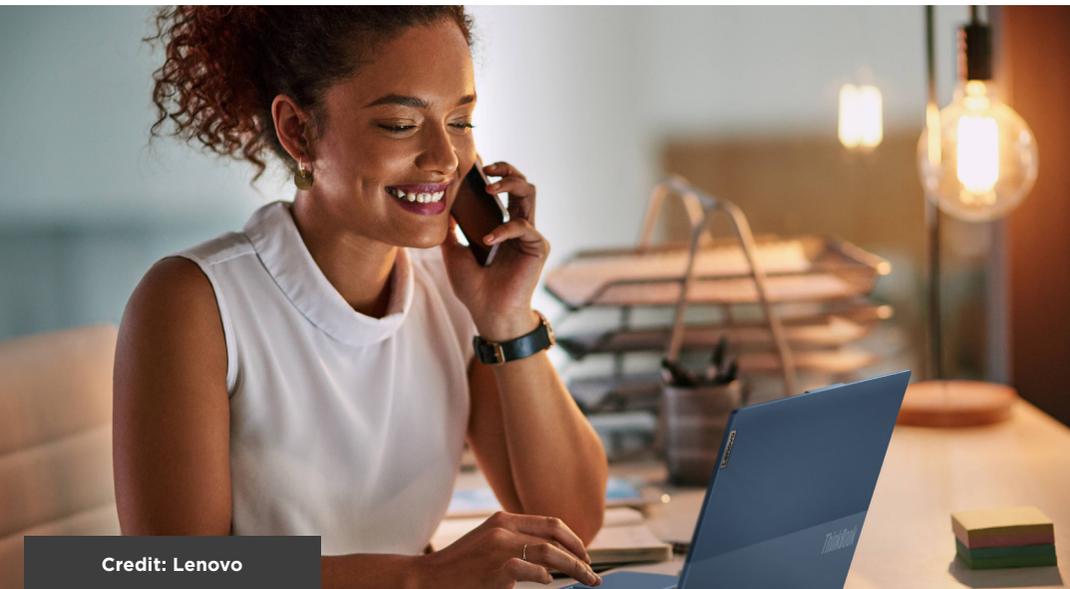
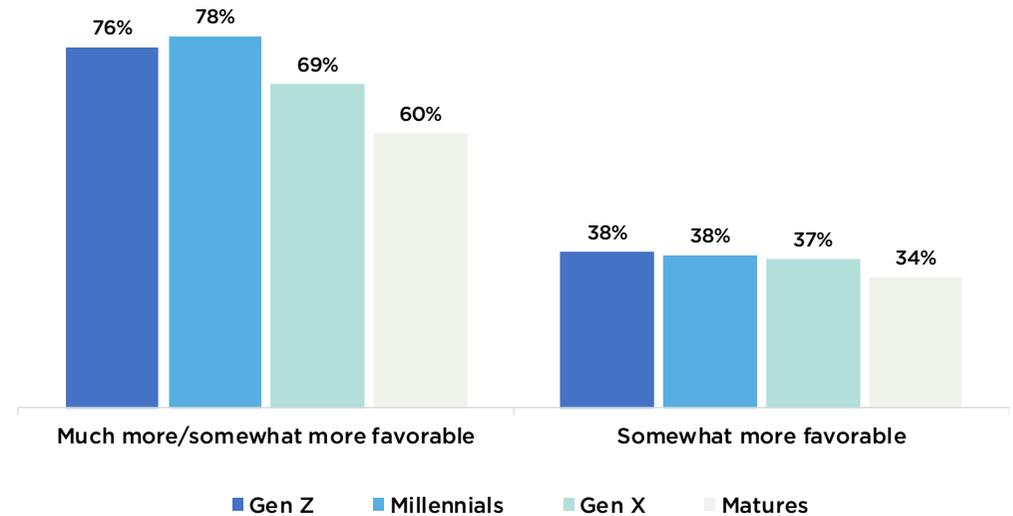
77%
of respondents overall believe technology will make it easier to “Work from Anywhere” effectively.

When it comes to working remotely, the majority of respondents suggested a variety of ways technology companies could improve the employee experience, including:

- Provide good, **updated equipment**
- Ensure **continuous** innovation
- Optimize **“Work from Anywhere”**
- **Improve** ease and efficiency
- Enhance **employee training**
- Support local **communities**
- Improve the **user experience**

Tech Companies & Favorability: By Generation

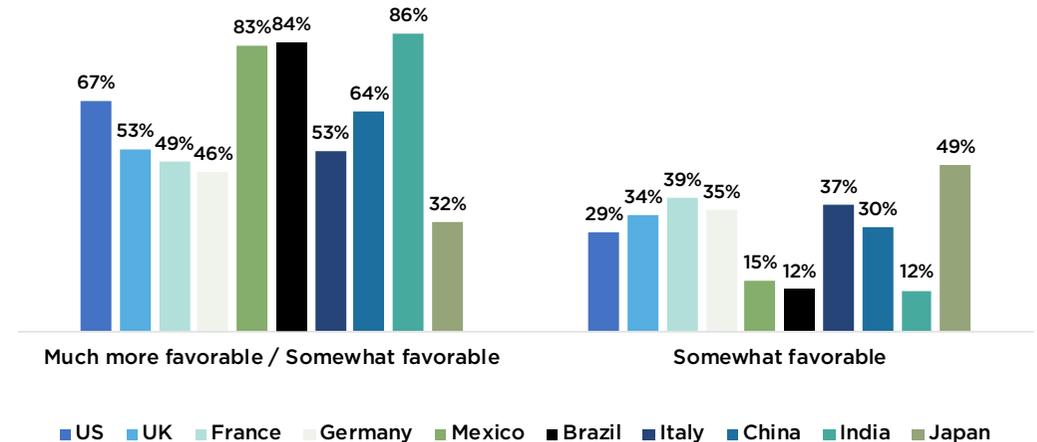
“If there was a leading technology company that could help identify ways to give back and make a positive impact in a “Work from Anywhere” location, would you be more favorable or less favorable towards that tech company?”



Credit: Lenovo

Tech Companies & “Work from Anywhere”: By Market

“Does the role of technology in enabling and empowering this type of work experience make you more favorable or less favorable towards leading technology companies?”



INSIGHTS BY MARKET: NOTABLE VARIATIONS

United States

- Millennial and Gen X respondents have a greater desire to work remote compared to their counterparts in most other markets.
- **66% say** they would be more favorable towards a company that identifies ways to give back to the local community during a “Work from Anywhere” experience.
- **75% feel** that “Work from Anywhere” benefits employees, employers, local communities and society.
- **Of particular interest:** Nearly **90% in the U.S.** find that giving back to the community is vital when “Working from Anywhere”.

Key takeaway

Over 80% in the U.S. say they would be satisfied with “Work from Anywhere” most or all the time.

UK

- **47% believe** that access to mental health services would be critical to their quality of work life.
- **60% care** most about finding a quiet and relaxing place to “Work from Anywhere.”
- **Of particular interest:** While more than **80% recognize** the importance of technology in working remotely/flexibly, a lower percentage say that technology has made them more knowledgeable and helped them reach their full potential at work.

Key takeaway

While only 61% of UK respondents have never experienced “Work from Anywhere,” they are still open to the possibility and feel it can improve their work lives.

France

- Nearly **50% say** that they are not very satisfied with their workplace technology and only **63% believe** that effective “Work from Anywhere” technology exists today.
- More than **75% agree** that “Work from Anywhere” benefits employers, employees, local communities and society.
- **50% of employees** say it would be important to give back to the local community while “Working from Anywhere”.
- **Of particular interest: 60% say** they would have a more favorable view of a tech company that could enable a “Work from Anywhere” experience, lower than most other markets.

Germany

- Only **44% say** the ability to work remotely is an important part of a job indicate this is important to them.
- More than **50% say** they have access to the right technology in their current job, tied for lowest among all markets.
- The two most prominent “Work from Anywhere” benefits among German respondents are having more time to spend with family and more time to spend outdoors.
- **Of particular interest:** Out of those surveyed, Germans expressed least interest in caring about their jobs having a positive impact on society: only **55% say** this is extremely or very important to them.

Key takeaway

French respondents do not see as much value in a fully remote or hybrid work environment compared to other markets, instead preferring in-person with some degree of flexibility.

Key takeaway

After Japan, German respondents in our survey are the most likely to currently work in-person, and largely prefer it going forward. 47% say their ideal work environment is in the office or job site.

Mexico

- Mexican employees say they primarily miss the technology/ connectivity available to them at the office while working remotely.
- Technological challenges aside, Mexican respondents indicate that remote work allows them to take better care of themselves and their families.
- More than **90%** of those surveyed in Mexico feel the right technology is vital for them to stay connected to family and friends during their “Work from Anywhere” experience.
- **Of particular interest:** While most Mexican respondents say the necessary technologies exist for a successful “Work from Anywhere” experience, nearly **60%** are even more excited about emerging technologies that will make it easier, second highest among all markets surveyed.

Key takeaway

Tech companies that enable “Work from Anywhere” enjoy significantly greater favorability among Mexican respondents (89%) compared to other markets.

Brazil

- More than **90% feel** that maintaining a healthy and safe work environment was either “extremely” or “very” important in their job considerations.
- More than **80% across** all generations in Brazil feel that their current technology is highly impactful in helping them reach their “full potential” at work - some of the highest rates in the survey.
- **Of particular interest:** Considering that **92% feel** positive about their remote work experience, it is likely that “Work from Anywhere” can have the valuable impact on Brazilian work life that many crave.

Key takeaway

Brazilian respondents are extremely open to a “Work from Anywhere” experience.

Italy

- **42% of Italian respondents'** say their ideal work location is in-person, among the highest across the markets.
- **90% feel** that the potential impacts of “Working from Anywhere” on local communities and stimulating the local economy are important, the highest of all markets surveyed.
- **Of particular interest:** There appears to be a large gap between belief and action: giving back and contributing to the local community is the least likely way Italian respondents would spend their free time while “Working from Anywhere.”

China

- More than **80% of Chinese respondents** say they would be willing to “Work from Anywhere” even if it meant being away from friends or family for an extended period - the highest rate across all markets.
- **Of particular interest:** Among the Chinese respondents who have previously experienced “work from anywhere,” nearly **90%** have had a positive experience, indicating the significant opportunity for this unique way of working to take a more permanent hold.

Key takeaway

Italian respondents have less exposure and interest in remote work: fewer than 50% of Italians have “Worked from Anywhere”, one of the lowest rates in the Lenovo survey.

Key takeaway

In China more than 8 in 10 respondents have changed their view on working remotely during the pandemic.

India

- Indian respondents are enthusiastic about the prospect of “Work from Anywhere.” Such sentiments are built on a foundation of experience with remote work.
- Our research found Indian respondents are so eager to “Work from Anywhere,” that **75% would** even give up sex for a month to do so.
- Nearly **75% are willing** to take a pay cut relative to their in-office salaries to be able to “Work from Anywhere,” the highest rate across all markets.
- **Of particular interest:** Enthusiasm for “Work from Anywhere” could potentially be explained by the **66% of respondents** who feel Covid-19 has had an “extremely” or “very” large impact on their jobs - **20% higher** than the second-most impacted market of **Brazil (43%)**.

Japan

- 37% feel that the technology needed to effectively and successfully enable “Work from Anywhere” exists today, a much lower rate than most markets (interestingly, **47%** say they are not sure whether the technology currently exists).
- Older Japanese knowledge workers, who make up a proportionally larger part of the workforce in a country with an aging population, are much more resistant to working remotely.
- **Of particular interest:** More than half of Gen Z and Millennial respondents in Japan are open to “Working from Anywhere.”

Key takeaway

More than 80% of respondents have previously experienced “work from anywhere,” significantly higher than most other markets.

Key takeaway

Japanese respondents are markedly less enthusiastic about the prospect of “Work from Anywhere.”

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