



## **ThinkCentre**

Getting the right tool for the job:

## Putting desktops back on the table



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# The future of office computing needs to be hybrid

In the post-COVID return to the office, desktops have an important role to play. It's time to rethink what IT solutions and devices your employees and your business needs to be successful.

Can we predict where the workforces of today and the future will work? Or are we still too close to the COVID pandemic to make a call? For the past two years business managers have been rewriting employee handbooks to accommodate remote working and reconfiguring their offices for more intermittent visits by their staff. Young employees have new expectations around work life balance while their more seasoned co-workers have embraced a more flexible approach to their nine to five. And now as we start to put the pandemic behind us, we face uncertainty and anxiety as we try and second-guess whether there will be a snap back to pre-pandemic office-based working.

Looking ahead we see a hybrid future for how and where we work – at home, on the road and in the office. Only 16% of businesses run exclusively remotely and 44% have no flexible working policy<sup>1</sup>. But many more do.

For managers, now is a critical time to listen to how and where their employees want to work and make decisions about how to best equip them to be productive.

When it comes to IT, and particularly PC purchasing choices, decisions made either pre-pandemic, or during the pandemic, may not be fit for purpose for what lies ahead.

That's why we decided to undertake the Lenovo *ThinkCentre 2022 Changing Workplace Survey* which polled business end users and IT decision makers in Asia, Europe and North America. At Lenovo we've been looking at the

close connection between the provision of IT, productivity and the employee experience for several years. After the disruptions of the global pandemic and the attitudinal shifts that have stemmed from it, there has never been a more important time to look at this again.

During the pandemic IT decision makers have often defaulted to laptop purchases to accommodate a more mobile workforce. Technological development did not stand still during the pandemic. Devices continue to be enhanced, better at connecting and collaborating and new form factors are emerging. There are new decisions in PC choices that both business end users and IT decision makers need to make.

At Lenovo we firmly believe in getting the right tool for the right job. As we sit at a pivot point in the return to office today's modern desktops have many advantages for certain roles. Our research has also found that, even for highly mobile end users, having access to both desktop and laptop is seen as a distinct advantage.

There's one more consideration in IT decision making that we believe is going to play an increasingly important role in the future. Last year's COP26 was a pivotal moment in the climate change debate and one that galvanized support across governments and the business community. The regulations that will flow from the commitments made at

that meeting, and those that follow, will put increasing pressure on businesses to improve their environmental footprint. Computing has a part to play in that equation.

At Lenovo we've been looking at how we can make our devices more sustainable from components to casings, power consumption and packaging. In this survey we wanted to hear from business end users what their expectations were in this regard, and from IT decision makers if their company ESG strategies are looking to IT infrastructure to achieve their carbon netzero goals. The answer on both sides was that behind performance, it's a critical consideration.

For sustainable computing to fully realized, the lifespan of a device needs to be considered not just what it is made from. Here the expandability of desktops gives them the upper hand over laptops.

What we are seeing is that IT spending patterns of the past two years are out of synch with the needs of today, and tomorrow. Modern workforces need to be equipped with a combination of desktops and laptops and sometimes both. It is time to look again at desktops as it is perhaps in this segment where the greatest changes have occurred. Powerful, compact (in some cases miniaturized), customizable and expandable, there has never been more choice available and they offer attractive solutions to address productivity and sustainability goals. Computing, like your workforce, needs to be hybrid.

## **Key Takeaways**

1

As the COVID pandemic eases and employees increasingly return to their company premises to work there will likely be a need to upscale desktop purchases in company IT strategies.

3

Ensure you are always providing the best tool for the job. PC formats should always be matched to each worker's role regardless of where they normally work. Laptops should not always be the default choice.

5

Company executives are making the connection between ESG targets and IT strategy. The longer potential lifespan of desktops means they can help reduce e-waste over the long term.

2

Desktops fulfill a key role for those working in-office, but also for those working at home and in hybrid arrangements. End users want access to both desktops and laptops to be able to work more efficiently.

4

Desktops are not like they used to be. Miniaturization has created a range of new form factors that don't compromise on speed and power. Consequently, footprints are much smaller preserving precious workspace and allowing the devices to be more portable. This gives much greater flexibility in how spaces can be used.



**Section 1** 

# The Lenovo ThinkCentre 2022 Changing Workplace Survey

#### **SECTION 1**

## The Lenovo ThinkCentre 2022 Changing Workplace Survey

Through the past two years of the global COVID pandemic everyone has been working through a period of accelerated change. Over this time, predictions about what we should expect to happen in 'the new normal' have guickly become outdated.

Our survey was designed to understand the business needs and critical decision-making taking place around PC purchasing with a specific focus on attitudes and perceptions of desktops and laptops.

The insights will help IT decision makers adapt their strategies and retool staff in the best way for the return to office where hybrid workforces operating in a combination of work from office/work from anywhere are expected to predominate.

#### **Survey Period**

The Lenovo ThinkCentre 2022 Changing Workplace Survey was conducted in June 2022. This was a critical moment in time as several markets around the world were

pivoting from pandemic virus management to endemic management with a relaxation of social distancing measures which allowed offices to reopen.

#### **Target Markets**

In order to get the most objective results we polled four markets that had already switched to endemic virus management and the return to office was well underway: Singapore, Italy, U.K. and U.S.A. These markets are being closely watched and are providing the template for the rest of the world.

500 IT decision makers (ITDMs) and 500 business end users from large enterprises were polled online across these markets.

#### The Sustainability Factor

Our survey also addressed what has widely been described as the next global challenge – climate change. As corporations start to define Environmental, Social and Governance (ESG) strategies we asked ITDMs and end users about their expectations of how PC choices factor into target setting for more sustainable operations.



#### ITDMs

- Mainly companies with 1,000+ FTEs
- Involved in setting IT strategy & budget responsibility for devices
- >20% of employees have a company-provided device
- Over half of employees work flexibly



#### **End Users**

- Work full time
- Companies with 1,000+ FTEs
- Use company-provided device for over half their time
- Allowed to work flexibly





**Section 2** 

# New realities and expectations for IT in the post-pandemic workplace

#### **SECTION 2**

# New realities and expectations for IT in the post-pandemic workplace

#### At a glance:

- We need to start creating the offices of the future, today. 70% of businesses have downsized their office space and 79% have reconfigured their office space to accommodate hybrid working as a result of the COVID pandemic.
- Young digital natives will soon dominate our workforces. They demand consumer-grade IT experiences at the office, flexible working and shared responsibility for tackling climate change or they will leave.

## 2.1 The Return to Office - Not So Simple as it Might Seem

For the past two years of the pandemic, for most office workers, working from a home office has been the norm. Some have embraced the extra time it gives them to make the most out of their days. Others have struggled balancing work life and home life in the same space. We're now expecting a shift back to office working once again. COVID has been such a disruptive force that this is not a decision that can be taken lightly. Office managers and HR directors are having to put careful thought not just into the timing of when to go back to office working, but also what office space do we want or need to go back to and how to facilitate the shift.

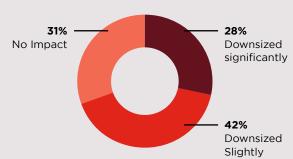
From here onwards 'the office' will now have an extended meaning to cover the conventional office, the home office and wherever suits your schedule – or mood – on any given day. While

new working scenarios are emerging, globally only 16% of companies operate fully remotely and 44% of companies don't allow remote working.<sup>2</sup> There is also the reality that some job functions cannot be performed from a home office.

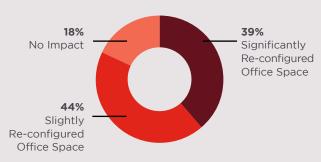
# Even with increasing remote working, the office will always remain an important part of the business structure.

Any company accommodating hybrid working needs to consider how to consider how much office space they need for a smaller number of employees on site at any one time; how much space they need to dedicate to different activities (reception, dedicated desk space, meeting and collaboration spaces, storage, dining etc.) and how to create a productive working environment that encourages employees to use it. In reality, these three questions are critically interlinked.

## Have you downsized your office space in the past two years due to the COVID pandemic?<sup>4</sup>



## Have you re-configured existing office space in the last two years due to the COVID pandemic?<sup>5</sup>



For some that means downsizing.<sup>3</sup> 70% of companies polled in our survey report they have downsized their office space in the last two years due to the impacts of COVID on their business. Reconfiguring of office space has actually been more common than downsizing with two fifths of companies reporting a significant change.

When staff visit the office, they are looking for things that they can't access at home. Generally, that means face-to-face interaction for faster planning and decision making than can be achieved virtually, and access to equipment and resources. Offices need to accommodate the emerging needs for both remote *and* in-office workers.<sup>6</sup> Office redesigns help encourage team collaboration and improve the employee experience to support staff retention.

Whether downsizing or reconfiguring an existing space, both approaches put individual desk space at a premium<sup>7</sup> and personal desk sizes are shrinking.

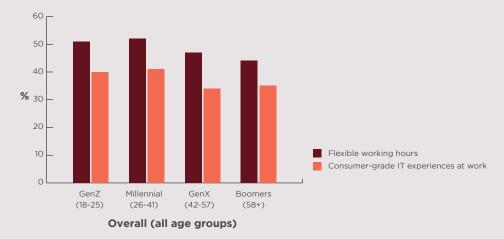
Available desk space needs to be optimized so employees feel comfortable not cramped. If employees have more personal space at their home office, they will be reluctant to return to their business premises. For many office workers, they need open available working space alongside their PC which is the device with the biggest single footprint of any item in their toolkit.

How desk space is used, and the PC choices employees are equipped with needs careful consideration.

## 2.2 Employees and their heightened IT expectations

The composition of our workforces is in a state of perpetual evolution as fresh young talent joins the workplace for the first time while older employees mature and eventually retire. Mindsets and expectations change between generations which impacts how staff are managed and how businesses operate.

## Which of these are key concerns for your workforce and how does this vary by age group?<sup>10</sup>



By 2025, millennials (born 1981 – 1996) and Gen Z (born between 1997 and 2009) will make up 64% of the global working population.<sup>8,9</sup> They're motivated, have high demands of employers and expect flexible working practices so they can better manage their work-life balance. The pandemic has successfully proven that businesses can still function when some or all their employees are working from home.

These two demographic groups, and GenZ in particular, were born in the digital era and never experienced the tedious manual office processes that preceded it. The revolution in consumer-grade devices that has occurred over their lifetimes has raised expectations for the IT they use at work. They want the computing power and internet connection speeds they experience at work to be better than what they have at home. As

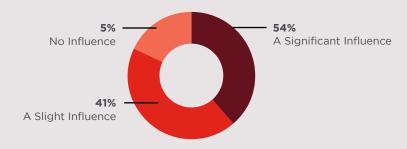
some of them may have upgraded their home office set ups during extended lock downs, the return to office may be accompanied with frustrations if expectations are not met undermining attempts to make the move.

The reality is that workspaces and IT are as much a part of the employee experience as corporate

culture and management styles. Companies need to invest in smarter technologies while streamlining IT operations to improve the employee experience.

Office perks like fruit platters and fresh coffee are no longer enough to attract and retain talent or keep them productive.<sup>11</sup>

## IT decision makers believe IT equipment has an influence on the overall employee experience<sup>12</sup>



Talent retention is currently a big problem. Prolonged periods of lock downs drove people to reconsider what matters most to them with many reprioritizing their decision making as a result. As markets have opened up and economies rebound talent is in high demand across all industry sectors offering fresh opportunities to employees. The 'Great Resignation' was one of the biggest workplace stories of 2021

as it swept across the U.S. and Europe<sup>15</sup> and was particularly prevalent among millennials.<sup>16</sup> There are indications that it will happen in Asia in 2022.<sup>17</sup>

Less driven by salaries than their predecessors in the workplace, millennials and GenZ take a bigger view of the world of work. In parallel with career milestones, these younger cohorts

**74%** 

of ITDMs believe companies that value the employee experience and want to retain their top talent must invest in smarter technology that keeps pace with their needs<sup>13</sup>

48%

of ITDMs are finding more employees are leaving the company if they are unhappy with the IT equipment we provide<sup>14</sup>

also want to address the world's most pressing challenges and expect the business community to be a force for good in helping tackle them. Climate change and protecting the environment is a top issue for these demographics. They're also willing to change jobs if company values don't match their own. This puts a far higher return on investment on company sustainability policies if they are executed and communicated well.

In the current climate, the perceptions and priorities of the biggest proportion of the workforce is putting a lot of pressure on executives and IT teams to rethink the employee experience they offer. The employee experience is no longer gauged purely on the day-to-day happenings within the place of work. It now extends to considering the impact of how that work is performed on the planet itself.



**Section 3** 

# Getting the Right Tool for the Right Job

#### **SECTION 3**

## **Getting the Right Tool for the Right Job**

#### At a glance:

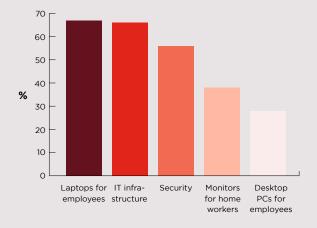
- IT decision makers have defaulted to laptops as the preferred PC solution for dispersed employees working away from the central office during the pandemic.
- A one-size-fits-all approach does not match the use cases found in the modern business environment. Today's businesses need a combination of laptops and desktops – and many employees would like access to both.
- Giving end users the right tool for the job enhances their work experience, increases productivity and supports talent acquisition and retention.
- New smaller form factors of modern desktops that retain their power, speed and visualization advantages are set to reset the balance in PC purchasing decision making in the post-COVID era

## 3.1 The impact of COVID on IT spending strategies

While there is certainly change ahead, the more mobile, work from anywhere workforce has already shifted IT strategy and spending. Over four fifths of ITDMs (89%) report that they have had to make changes to their company IT

strategy due to COVID over the past two years. For 44% those have been significant change<sup>19</sup>. These strategy changes have come at a cost. 86% have needed to make IT investments to buy new equipment<sup>20</sup>. Over half of ITDMs buying new equipment during the pandemic purchased laptops whilst desktop purchases were less common.

## Which of these categories have you invested in over the last two years due to the COVID pandemic?<sup>21</sup>



To be able to quickly retool employees being forced to work from home due to social distancing measures and lockdowns, laptops are certainly a logical solution. But now as work patterns once again become normalized pre-pandemic truths will re-emerge.

In any workforce there will be some workers who need to be mobile and be able to work from anywhere. Laptops are a natural choice for them. Others need to work from a fixed station – either at home or in the office – using a PC that offers more security, better computing

power and stronger visualization. For this group, desktops work better.

Now businesses are starting to mandate a return to office with hybrid working, will the preference for laptops quickly become outdated? Do employees still have the right tool for the job?

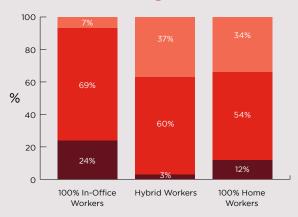
#### 3.2 Work from anywhere PC choices

81% of ITDMs polled in our survey are having to address the PC needs of hybrid workers in the workforce. 35% were also supporting 100% inoffice workers and a further 24% were responding

to home workers. Only the provision of a mix of PC formats can address this spectrum of preferred working styles.

Across all working patterns most ITDMs provide a mix of both laptops and desktops. Over 3 in 4 ITDMs agree having the right tools increases staff happiness and productivity and that PC formats need to be linked to job roles. 76% of end users agree and report being happiest and most productive when they have the right equipment to get their job done<sup>22</sup>. In-office workers are more likely to be provided with a desktop only while hybrid and home workers are more likely to receive a laptop only.

## What type of device does your company provide for these different categories of worker?<sup>23</sup>



#### Device Purchase Triggers (ITDMs)<sup>24</sup>

#### **Top Purchase Drivers of Desktops (ITDMs)**



Monitor Size / Visualization



Computing Power



**51%**Processing Speed

#### **Top Purchase Drivers of Laptops (ITDMs)**



Portability



**65%** Take Up Less

Room

Desktops are the right tool for roles in which large monitors for better visualization, computing power and speed are critical.

Triggers for laptop sales are portability and their compactness which takes up less space<sup>25</sup>. Almost two thirds of ITDMs agree desktops

have an important role to play in the modern office environment<sup>26</sup> and over half (55%) believe that desktops allow staff to get work done more smoothly than on laptops<sup>27</sup>.

All of this evidence points in favor of the continued use of desktops. But our research shows that twice as many ITDMs would prefer



to give home or hybrid staff laptops rather than desktops<sup>28</sup> and 57% think their employees prefer laptops over desktops, particularly for millennial and GenZ employees compared to older Boomers<sup>29</sup>. Their perceptions appear to be in touch with end user preferences: 56% of end users believe they can get their work done more smoothly on a laptop<sup>30</sup>.

However, our research also shows that end users are not quite as singular in their decision making. End users recognize the benefits of desktops just as much their IT decision makers<sup>31</sup>. Almost a fifth of end users (18%) do not have a strong preference for working on a desktop or a laptop<sup>32</sup> and 70% of home and hybrid workers said that they would like access to both types of devices to enhance their productivity.

This data shows that there is room to avoid falling into a trap of buying laptops by default based on user preferences, even for hybrid or home workers.

Additional features would help encourage desktop consideration and support best practice in matching device to user needs in purchase decision making. Fortunately,

those features are already being addressed and there is an opportunity to get the best of both worlds in a desktop format.

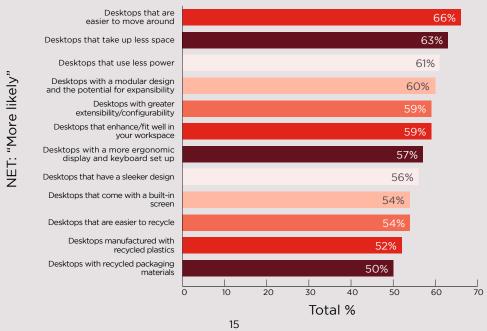
## 3.3 Desktop evolution - the best of both worlds

Desktops have changed. Miniaturization has created new, innovative form factors that do not compromise on the faster processors and computing power you would expect from a conventional desktop, combined with comfortable larger screens for higher performance.

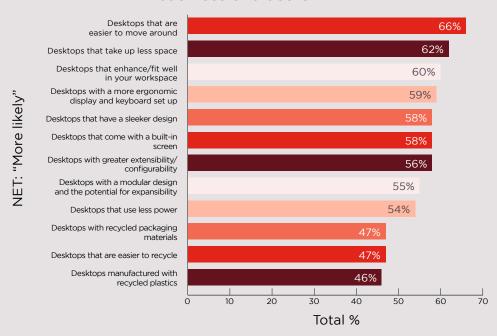
Bulky towers that dominated work surfaces or squeezed leg room under a desk have been replaced by form factors as small as 0.5 liter in volume and all-in-one devices are available that completely declutter workspaces.

Small size and single cable connections maximize the workspace available for users and make these devices much more portable. Home offices often need to be flexible spaces that can easily convert into extended dining spaces or bedrooms. In conventional offices IT teams often need to swap devices and reconfigure spaces to accommodate workers'

## Impact of upgrades on choosing desktops over laptops – IT decision makers<sup>33</sup>



## Impact of upgrades on choosing desktops over laptops – business end users<sup>34</sup>



needs. Portability is not something that has been possible to easily address with desktop PCs until now.

Desktops also offer other unique advantages, one which is comfort. Ergonomic displays and keyboard set ups promote a much healthier typing position which reduces the risk of computer-related injury. Another key benefit is modular design and expansibility. Taking a modular approach to the design process makes the devices highly customizable to match very specific computing needs giving options that go far beyond binary laptop versus desktop decision making.

Desktop casings also allow devices to be expansible meaning that they can be upgraded

to improve performance as needs change or technology advances. Extending the lifespan of these devices makes them a more sustainable choice, particularly when combined with smart manufacturing and energy efficiency improvements. These advantages will be discussed further in Section 4.

The fundamental advantages of desktops have not changed. But technology has moved on allowing two of their past weaknesses – size and simplicity – to be added to list of their competitive advantages. As more workers spend less time at home and more time in their work office, desktop purchases are likely to increase.

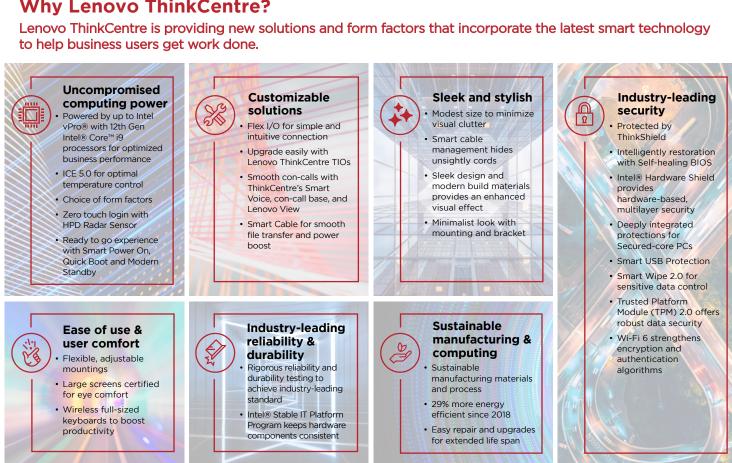
## **Redefining Desktops** to Empower Your **Changing World**

Desktops have changed. Forget what you think you know. Desktops are no longer bulky, boring, and immobile. If you want to get your work done effectively, efficiently and comfortably, a desktop is the modern solution for the changing workplace.

## Introducing the Lenovo ThinkCentre Family

#### ThinkCentre M Series ThinkCentre Neo Series Small Form Factor Tinv All-In-One Tiny-in-One Towers Small Form Factor All-In-One Towers 17L / 13.6L 8.2L / 7.4L 22" / 24" 22" / 24"/ 27" 17L / 13.6L 7.4L 22" / 24"/ 27" Compact, Highly Minimal Optimized High-Compact yet Delivering High performance performance stable, and full-featured footprint and agility to any workspace with performance, desktops for manageable desktops enterprisetype and size desktops to take adaptive power immersive visual business enterprise level of business on complex tasks management and intuitive desktops productivity and space experience with savings Al chip camera

## Why Lenovo ThinkCentre?



## **Comprehensive Care by Lenovo Services**

Lenovo offers a comprehensive portfolio of services that support the full lifecycle of your Lenovo IT assets.



## **Premier** support

• 24x7x365 access to elite Lenovo engineers



#### Lenovo Deviceas-a-Service (DaaS)

 A single, flexible solution to maintain predictable monthly costs



#### Lenovo warrantv

Protected by offering a full • range of award-winning, flexible services



### Lenovo CO<sub>2</sub> Offset Services

intel.

vPRO

Lenovo works with an Environmental Partner to compensate the CO<sub>2</sub> emissions





# Section 4 IT Meets ESG

#### **SECTION 4**

## **IT Meets ESG**

### At a glance:

- More and more companies are defining ESG (Environmental, Social and Governance) strategies to minimize their carbon footprint. IT purchasing contributes to sustainability goals through a combination of energy efficiency and e-waste.
- The expandability of desktop computers gives them the option for an extended lifespan which means they have a key role to play in making businesses more sustainable.

### 4.1 IT's impact on company sustainability

From shareholders to employees to stakeholders there is an expectation that businesses need to be more considerate of the impact their operations have on the wellbeing of the planet. This is an expectation that has accelerated since COP26. Many businesses are now setting carbon net-zero goals.

Right now, carbon net-zero targets are not mandatory. In the future that is unlikely to be the case. More stringent sustainability regulations on businesses are expected to be set by governments as we get closer to 2050 – the date set by the 2015 Paris Climate Agreement for decarbonizing the energy system.

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In the USA, computing represents 20% of total office energy consumption<sup>35</sup>. Energy efficiency through the use of power efficient devices and more intelligent power management settings helps reduce costs – particularly when the cost of energy can be volatile, like in today's world. There are also knock-on



benefits in helping to reduce office cooling costs and improved employee comfort levels which helps improve productivit<sup>36</sup>.

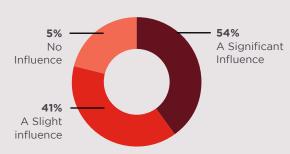
Electronic waste or e-waste is a further challenge. Pre-pandemic in 2019, only 17% of discarded electronic devices were appropriately recycled which leads to air, soil and water contamination as well as the loss of precious metals - like gold - that could be recovered<sup>37</sup>. Last year in 2021, the World Economic Forum estimated that total 57.4 million tonnes of electronic waste (e-waste) was discarded globally. That outweighs the entire Great Wall of China which is the world's heaviest human construction<sup>38</sup>. If nothing changes, this number is expected to hit 74 million tonnes by 2030. That's an increase of 3-4% each year.

Clearly there is much that company ESG and IT teams can achieve by working together in partnership.

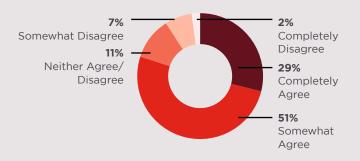
## 4.2 Making a positive contribution to company ESG targets

Close to 80% of the companies we spoke to in our survey either had an ESG strategy in place or were in the process of defining it<sup>39</sup>. Around nine in 10 employees believe the company they work for should have an ESG strategy in place<sup>40</sup>. IT decision makers also see the role they can play in helping their companies achieve their ESG targets with 80% agreeing IT purchasing will be a key consideration in the strategy.

Has your company defined or is in the process of defining an ESG (Environmental, Social and Governance) strategy to help minimize its impact on the planet?<sup>41</sup>



How much do you agree or disagree that IT purchasing is/will be a key consideration of your ESG strategy?<sup>42</sup>



As a general rule, desktop computers consume more energy than laptops. Laptop components are designed to be more energy efficient to conserve battery life. Desktops are designed to be more powerful and so have more components which consume more power<sup>43</sup>. That doesn't mean that businesses need more laptops. It means they need more power efficient desktops.

But there is one distinct advantage that desktops can contribute to the sustainability equation – they are expandable which can extend their effective lifespan. To best manage e-waste, in addition to finding more effective ways to recycle, an equally important approach is refurbishment which extends a device's life for the current user. or finds a second home with a new user<sup>44</sup>.

Ease of recyclability would make more than 50% of IT decision makers choose desktops over laptops. The potential for more expansibility would encourage 60% to do the same<sup>45</sup> providing a marketable opportunity for PC manufacturers to build into their designs.

With this in mind, desktops have an important role to play in company ESG strategies in supporting the transition to carbon net zero. Furthermore, being seen to be more sustainable can improve a company's brand reputation and employee affinity in attracting and retaining talent.

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