

Generation Y in the Workplace: US, India & China ^o

Research-led insights and concepts
by Steelcase Workspace Futures

Why study Gen Y?

What trends do we see happening in the workplace?

US Gen Y workers will replace 75 million Baby Boomers by 2025

Is this similar trend in emerging markets?

What are Gen Y's needs and expectations?

How will Gen Y influence the work and workplace of tomorrow?



Why study Gen Y in India & China?

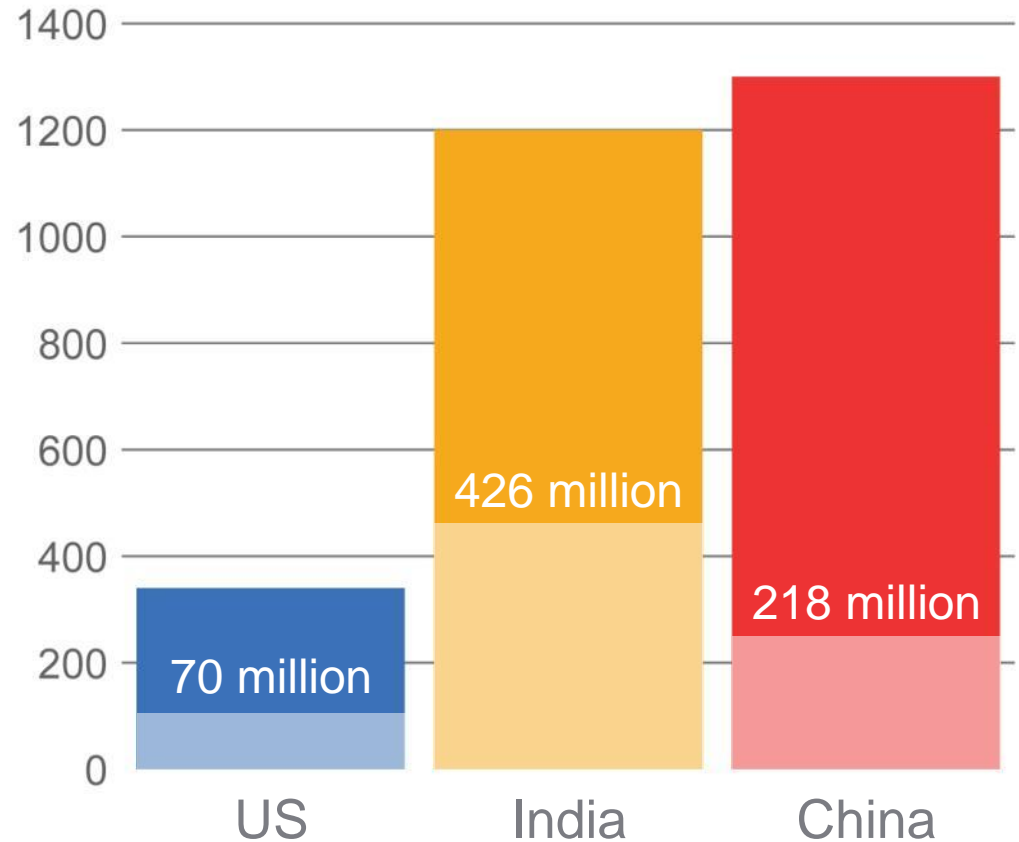
India and China represent the largest emerging markets in the world today

China

2nd largest economy

India

4th largest economy



Understanding | Research | Findings

Who is Gen Y?



US Gen Y

1980 – 2000

India Gen Y

1980 – 2000

China Post-80s

1980 – 1990

Understanding Gen Y in context

Power Distance Index

Individualism

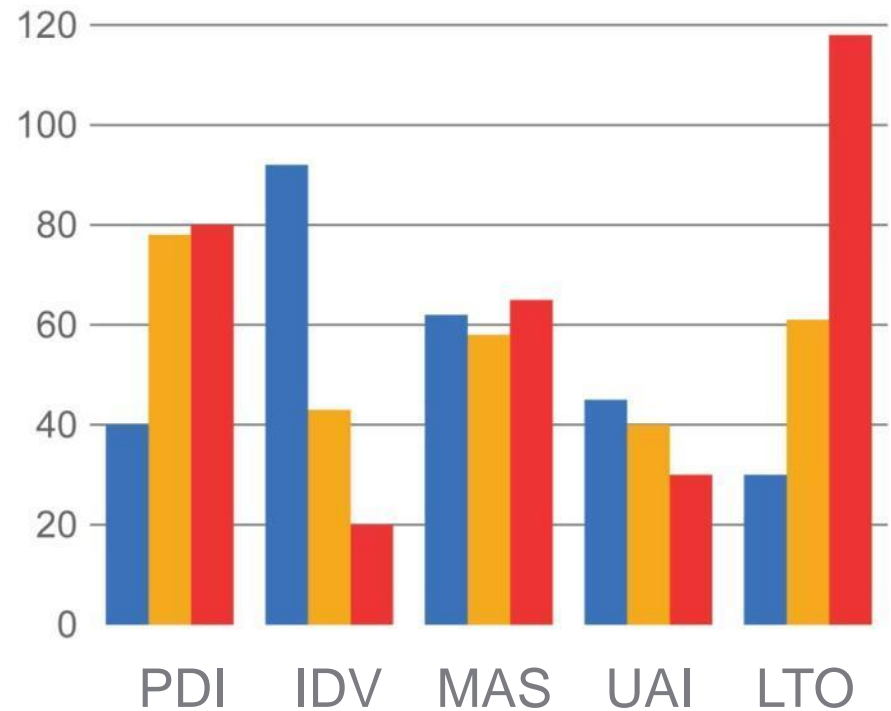
Masculinity

Uncertainty Avoidance Index

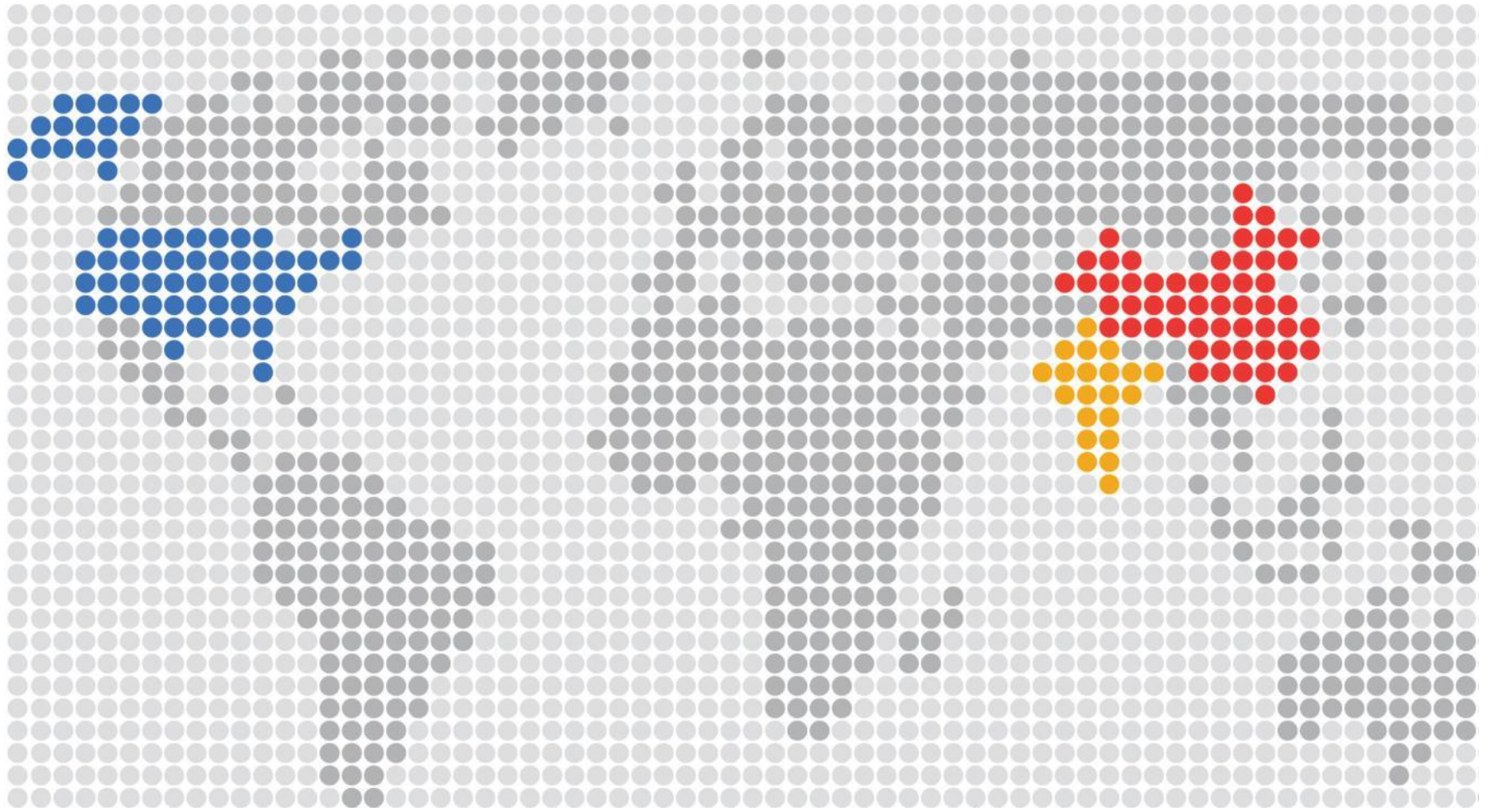
Long-term Orientation

● US ● India ● China

Geert Hofstede's Model of Cultural Dimensions



Culture, Politics, Economics, Technology



Understanding GenY and Post-80s in context

Culture

US

Nation of immigrants

Extreme individualism is a strength and a weakness

Demographics:

Fragmented and Local:
sports, politics

National: fast food,
obesity, healthcare, etc.

India

Multi-cultural and
multi-religious society
for thousands of years

Tremendous loyalty
towards immediate family

Cricket unifies a country
of differing cultures

Country of dreamers;
everyone aspires to
better themselves

Western aspirations in
conflict with traditional values

China

Confucian education =
respect for authority

“Guanxi” = relationships
and social connections

Brand recognition is key to
most purchase decisions

Modernizing, but
not Westernizing

Tech-savvy and urban,
yet traditional Chinese

Understanding GenY and Post-80s in context

Politics

US

Switch between engagement with and isolation from the world

1950s: space race, growing prosperity

1960s: Vietnam war

1970s: Nixon | Watergate

1980s: Conservative

1990s: Iraq War 1

2000s: 9/11 | war | Obama

India

10+ political parties

Co-founder of the Non-Aligned Movement, and also a nuclear power

1991 reforms opened India to global trade

Politics are chaotic, with bureaucracy and corruption

Influenced by illiteracy, poverty, unemployment and religious diversity

China

Historically, government was isolated from world

Return of Hong Kong, then economic reforms

Growing national pride

British rule of Hong Kong

Hong Kong is “Special Administrative Region”; one country, two systems

Understanding GenY and Post-80s in context

Economics

US

Largest economy

Rising prosperity since 1950s

Not a nation of savers – no future-thinking

2010 US Census Bureau reported over \$886 billion in debt

India

4th largest economy; 1991 economic reforms led to economic boom

Asia's largest outsourcing industry and auto industry

Almost 3000 MNCs (37% are US companies)

Rising entrepreneurship, growing competition, and reduced political interventions

China

2nd largest economy

Removal of travel restrictions in 1983

More opportunities for higher education at home and abroad

Growing middle class

Hong Kong one of the three busiest ports in the world

Hong Kong is world's freest economy

Understanding GenY and Post-80s in context

Technology

US

Land of innovation
and marketing

IBM, NASA,
Microsoft, Apple

4,861 colleges
and universities

75.9% have access
to internet

3rd largest group of
mobile phone users:
255 million (2007)

India

3rd largest higher
education system, with
focus on IT, Engineering
and Research

IT sector is prominent

Mobile phones key to
modernization; 706 million
mobile phone users

4th largest internet user
base (81 million users)

China

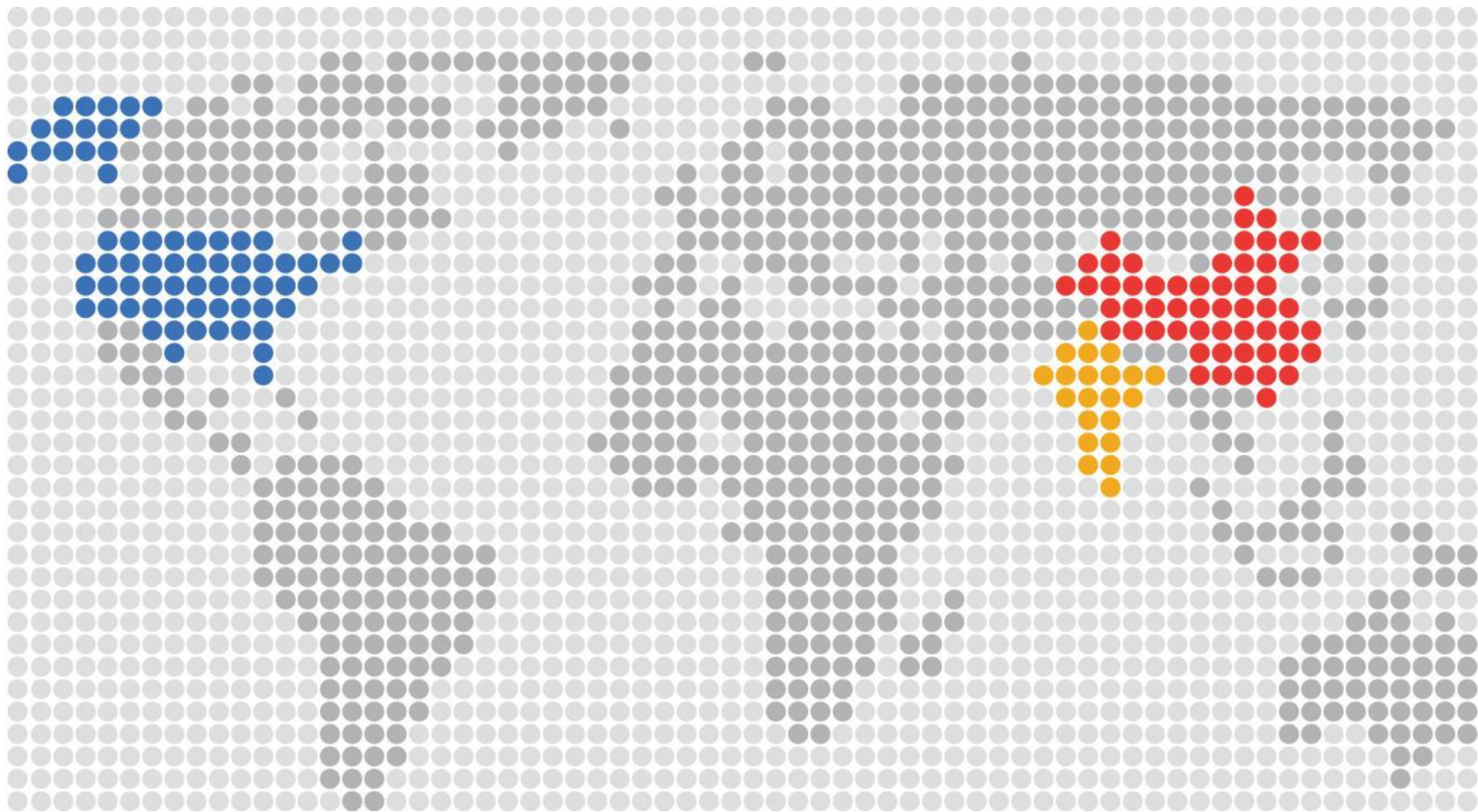
Technology has opened
doors to the world

384 million internet users

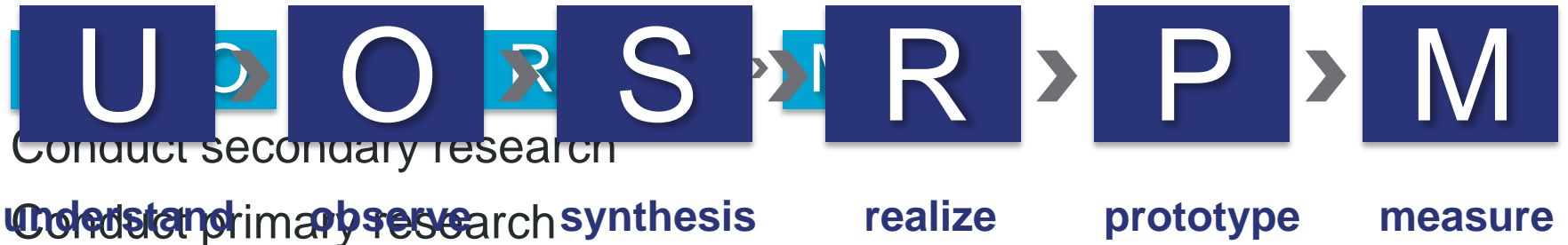
98.3% growth rate in
mobile phone access

Chinese providers serve
more customers than
foreign companies

Hong Kong – 4.3 million
internet users, 65% of
population



Human-Centered Design Process



Conduct secondary research

Conduct primary research

Photography and ethnography

Contextual interviews

Engage users in exercises

Look for patterns

Develop design principles

Develop thought starters

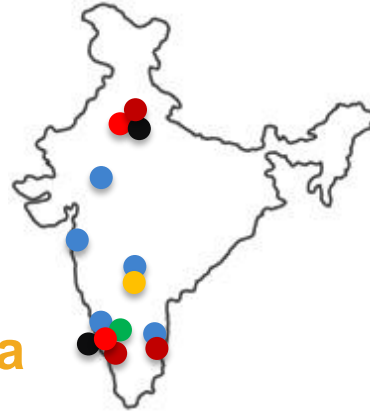
Sites visited

Cannot see outline of the country



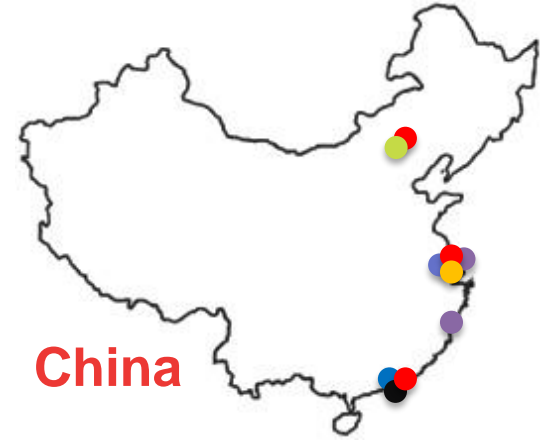
U.S.

- IT/Engineering
- Finance
- Manufacturing
- Consulting



India

- Technology
- Consulting
- Manufacturing
- Finance
- Media
- Services



China

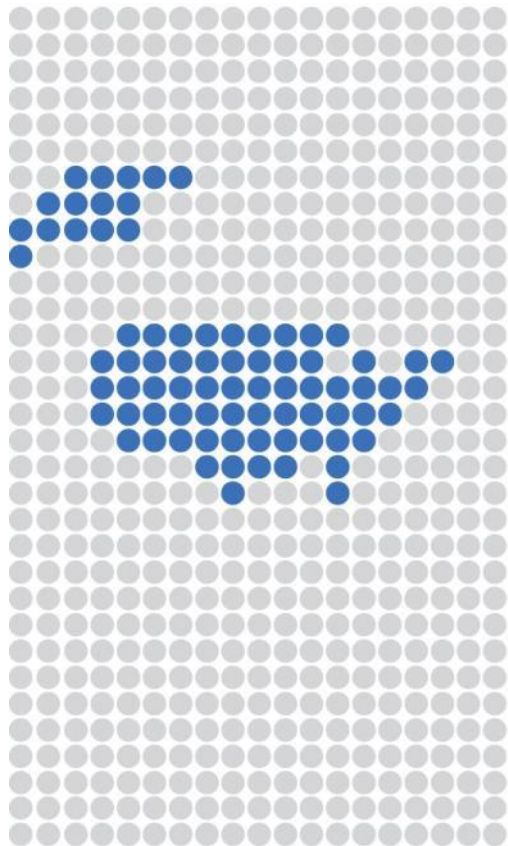
- Consulting
- Chemical R&D
- Technology
- Pharmaceutical
- Creative
- Manufacturing
- Services



Timeline Activity – Any generation is more than just a set of dates

Generations are defined differently around the world

US



Traditionals (1922 – 44)

Patriotism and respect for authority
Children of the Great Depression: “Doing more with Less”

Baby Boomers (1945 – 64)

Experienced increasing economic opportunity, social equality
Optimistic

Gen X (1965 – 79)

Global Thinkers
Technology innovators

Gen Y (1980 – 2000)

Tech savvy and connected
Focused on social, environmental, and global issues

Generations are defined differently around the world

India



Freedom Fighters (1900 – 46)

Personal needs were sacrificed; country came first
Loyalty and adherence to “traditional” divisions of society

Older Generation (1947 – 64)

Adapted to Gandhi’s “Less is More” philosophy and lifestyle
Part of the Green and White revolution, building a nation

Gen X (1965 – 79)

Focused on education
Open to diverse perspectives but lack of opportunities
led to brain drain

Gen Y (1980 – 2000)

Global awareness around trends, brands, technology,
innovations, entertainment, etc.
Crave for latest and greatest technology

Generations are defined differently around the world

China



Traditionals (1928 – 45)

Lived through war & independence,
survival was main concern

Lost Generation (1946 – 60/64)

Received little formal education
Understood there was “one way” of doing things

Post-70s (1965 – 79)

Grew up during first consumer society
Access to a wealth of new information from outside China

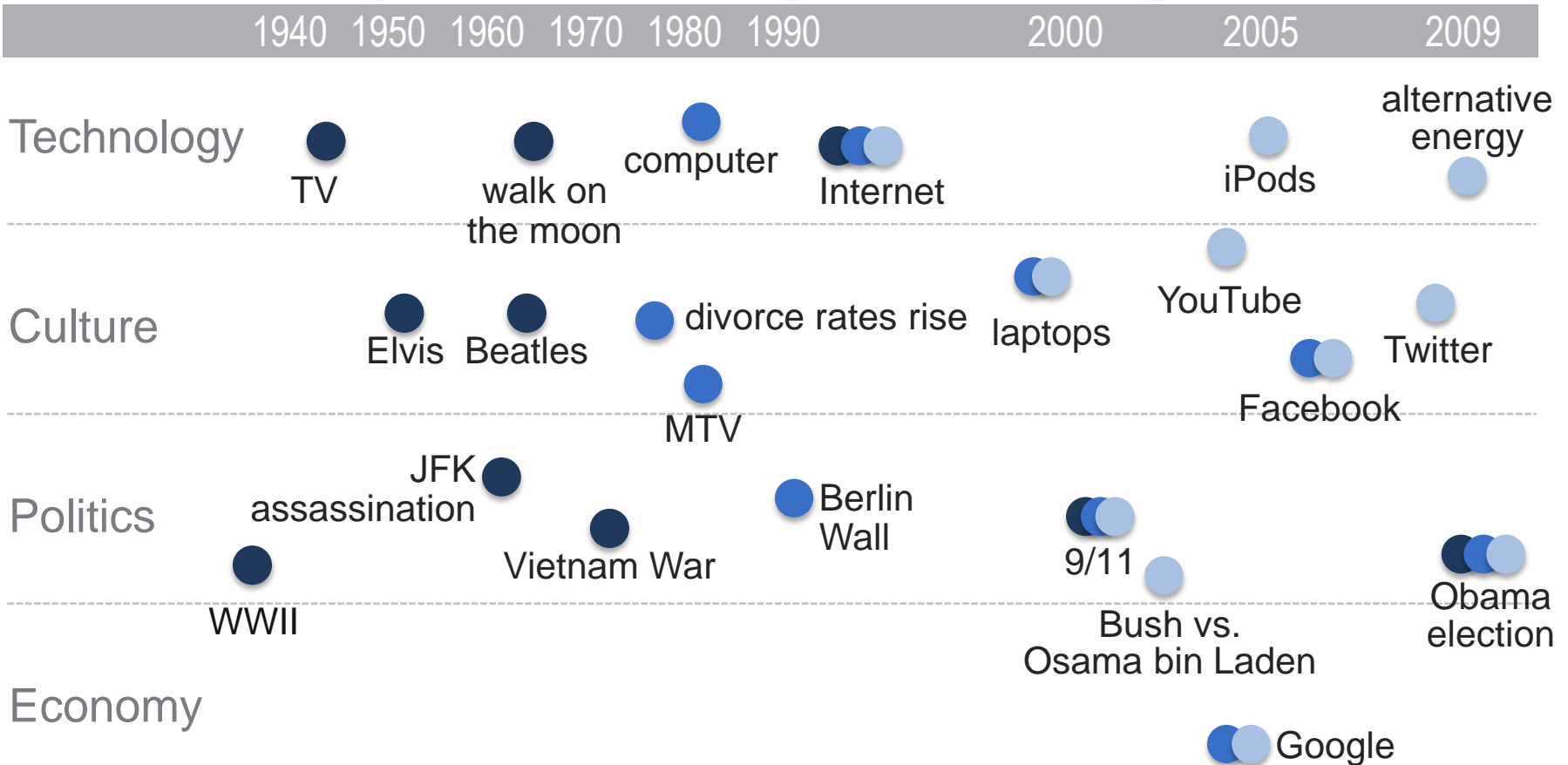
Post-80s (1980 – 90)

Have only known rising prosperity
Strong connections to trends and ideas from outside China

Generations: what memories do they share?

US

● Boomers 1945-64 ● Gen X 1965-80 ● Gen Y 1980-2000



Generations: what memories do they share?

India

● Traditionals 1945-64 ● Gen X 1965-80 ● Gen Y 1980-2000

1940 1950 1960 1970 1980 1990 2000 2005 2009

Technology

IITS open

TV

iPhone

Culture

India wins World Cup

Ash Rai Miss Universe

Cricket World Cup & Sachin Tendulkar

AR Raheman Oscar

Politics

M Gandhi assassination

Indira Gandhi assassination

Ayodhya Riots

9/11

28/11

Obama election

Economy

Non-Aligned Movement

nuclear tests

tsunami

TATA cars

Generations: what memories do they share?

China

● Lost Generation 1945-64 ● Post 70 1965-80 ● Post 80 1980-2000

1940 1950 1960 1970 1980 1990 2000 2005 2009

Technology

Shenzhou VI –
1st Chinese Spacewalk

Culture

Cultural
Revolution

SARS

Beijing
Olympics

Politics

Hong Kong
returns to China

June 4th Event

9/11

Economy

Founding of
the PRC

Economic
Reform

China enters
WTO

Macau returns
to China

Sichuan
Earthquake

Economic
Crisis

Key Characteristics of the Gen Y and Post-80s Generations

US

Diverse

Tech savvy

Socially-minded

Multi-taskers

Collaborative

Overprotected

Seek intertwined work and life

Real time

Connected

Easily-bored

Creative

Entitled

Empowered

Risk takers

Entrepreneurial

Life-long learners

India

Open-minded

Energetic

Hard working

Tech-savvy

Ambitious

Positive

Confident

Independent

Competitive

Impatient

Losing Indian culture and values

Self-centered

Quick Money

China

Eager to learn

Confident

Like to communicate

Open-minded

Energetic

Seek forward progress

Trendy

Self-centered

Active

Optimistic

Willing to take risks

Can't endure hardship

Dependent on parents

Creative

Educated

More active virtually than face-to-face

Tech-savvy

Gen Y generation

Working without boundaries of country, culture, religion, race, time zones

Caring for common and higher causes: environment, poverty, peace, etc.

Technology is oxygen; success through social and peer-to-peer networking

High expectations of self – they believe that they can achieve anything

Collective effort by individual recognition;
drive for meaningful and impactful work

Expecting mentorship and supervision; desire constant
public recognition and encouragement

Life before work; family first, followed by friends & peers



Gen Y generation

Open to new ideas and new possibilities; optimistic about their future

Desire and drive for entrepreneurship and making a difference

National pride; competitive regionally and globally;
proving they're not less than global peers

Always engaged in activities with peers: doing, sharing,
discussing what interests them

Deep interest and pride in owning state-of-the-art technology

Passion for western lifestyle conflicts with traditional values;
focus shifts from family first to me first



Post-80s generation

Want to be active participants in the process, not just come to work to perform a task

Comfortable communicating via phone, email, IM, both locally and globally

Confident they can do anything they're asked to do

Follow latest trends and brands, so will gravitate towards “cool” companies

Always looking to grow through “exploration;” any opportunity is a learning opportunity

Desire to fulfill one's own dreams conflicts with traditional Chinese values about family





How do Gen Y and Post-80s value work and the workplace?

Comparing values about the Workplace

US

Collaboration
Connectedness –
constant communication
Creativity
Responsibility
Speed
Diversity
Comfort
Drive to do well
Efficiency
Fun

India

Recognition and reward
Growth opportunity
Entertainment
Convenience
Sense of achievement
Responsibility
Teamwork
Open Culture
Commitment
Low stress

China

Good reputation
Friendly environment
Relaxed environment
Personal office
User-centered
Happiness
Culture of equality
and support
Work-life balance
Learning
Social events at work

What we heard and saw

Work
Worker
Work-Life
Environment

Work is 24/7 and global

Work



US



India



China

Collaboration

Work



US



India



China

Social networking is an important part of work

Work



US



India



China

What we heard and saw

Worker

Learning & growth are pursued as a means to further one's career

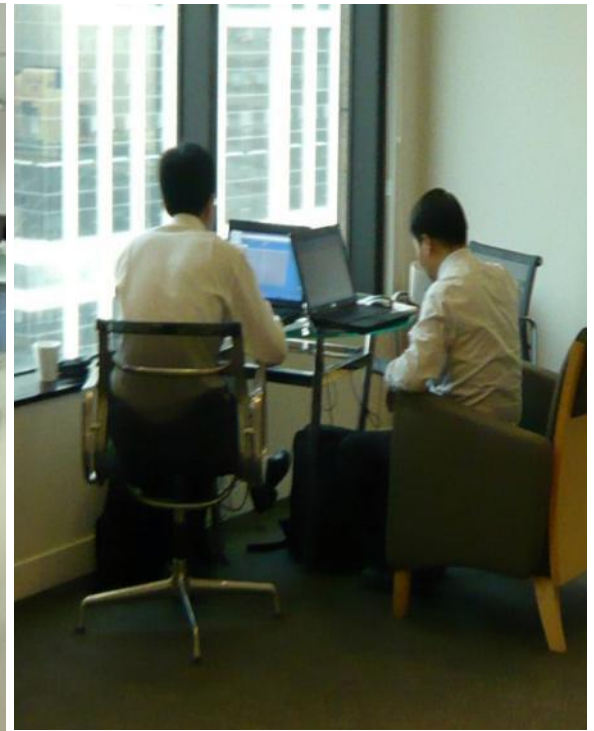
Worker



US



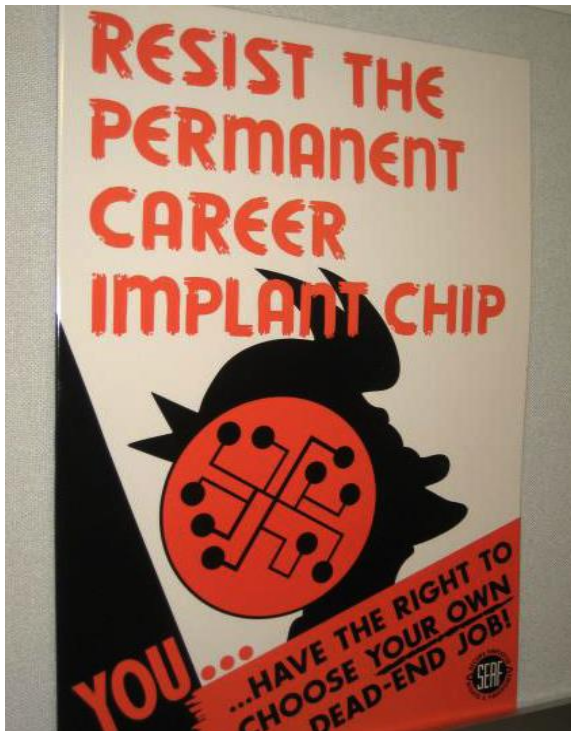
India



China

Gen Y is eager to express their identity

Worker



US



India



China

What we heard and saw

Work-life

Gen Y gravitates to 3rd places – but not for the same reasons

Work-life



US



India



China

Socialization is an integral part of work and work life

Work-life



US



India



China

Gen Y expects their company to help reduce stress

Work-life



US



India



China

What we heard and saw

Environment

Transparency for effectiveness and growth,
not just information

Environment



US



India



China

Wanting to be modern is not the same
as being Western

Environment



US



India



China

Collage making exercise



Computer model

Participants select
words and pictures

Illustrate current
and ideal work
environments

Collage making exercise

Current impressions



Ideal environment



Collage making exercise

Current work environment

US Gen Y

Top word choices

Challenge

Meetings

Top image choices



India Gen Y

Top word choices

Fun

Knowledge

Top image choices



China Post 80s

Top word choices

Routine

Freedom

Fun

Top image choices



Collage making exercise

Ideal work environment

US Gen Y

Top word choices

Active
Flexible

Top image choices



India Gen Y

Top word choices

Fun
Growth

Top image choices



China Post 80s

Top word choices

Fun
Shared

Top image choices





What we've learned



Conformity ➔ Identity

1



8 key shifts

US



Conformity ➤ Identity

1

Training ➤ Growth

2



8 key shifts

US

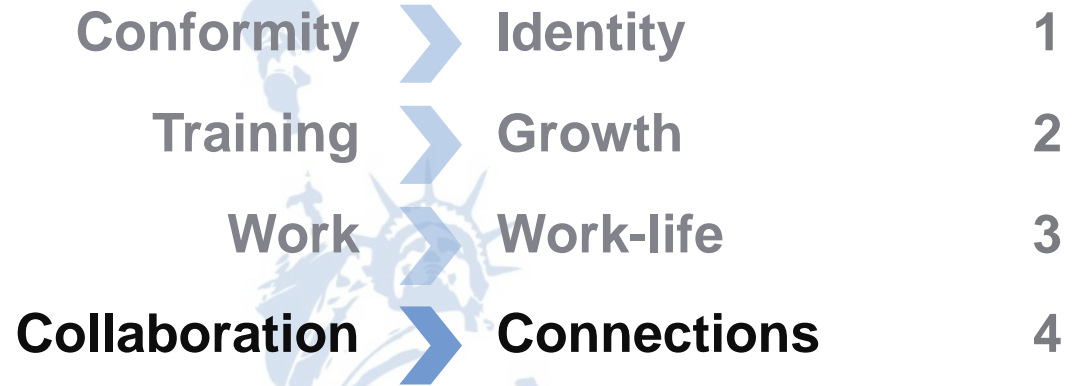


Conformity	➤	Identity	1
Training	➤	Growth	2
Work	➤	Work-life	3



8 key shifts

US



8 key shifts

US



Conformity	➤	Identity	1
Training	➤	Growth	2
Work	➤	Work-life	3
Collaboration	➤	Connections	4
Personal achievement is through my career	➤	Work does not identify me	5

8 key shifts

US



Conformity	➤	Identity	1
Training	➤	Growth	2
Work	➤	Work-life	3
Collaboration	➤	Connections	4
Personal achievement is through my career	➤	Work does not identify me	5
The office is my primary workspace	➤	The office is where “I” am	6

8 key shifts

US



Conformity	➤	Identity	1
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Technology is a tool	➤	Technology is an extension of me	7

8 key shifts

US



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The office is my primary workspace	➤	The office is where “I” am	6
Technology is a tool	➤	Technology is an extension of me	7
Trust is developed in person	➤	Trust is developed online & offline	8



Inherited identity



Created identity

1



7 key shifts

India



Conformity



Identity

1

Job security



Growth

2



7 key shifts

India



- Inherited identity > Created identity 1
- Job security > Growth 2
- Work-life > Work-LIFE 3



7 key shifts

India

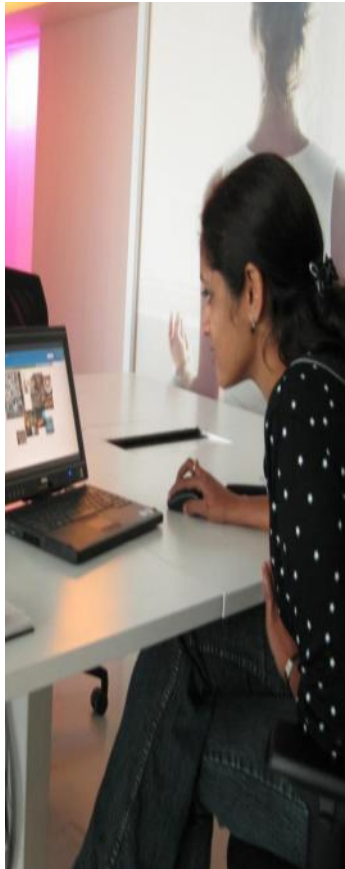


- Inherited identity > Created identity 1
- Job security > Growth 2
- Work-life > Work-LIFE 3
- Connections > Collaborations 4



7 key shifts

India



- | | | | |
|---------------------------|-------------|--------------------------|----------|
| Inherited identity | > | Created identity | 1 |
| Job security | > | Growth | 2 |
| Work-life | > | Work-LIFE | 3 |
| Connections | > | Collaborations | 4 |
| Service | > | Core competencies | 5 |

7 key shifts

India



Inherited identity	➤	Created identity	1
Job security	➤	Growth	2
Work-life	➤	Work-LIFE	3
Connections	➤	Collaborations	4
Service	➤	Core competencies	5
Local	➤	Global	6

7 key shifts

India



Inherited identity	➤	Created identity	1
Job security	➤	Growth	2
Work-life	➤	Work-LIFE	3
Connections	➤	Collaborations	4
Service	➤	Core competencies	5
Local	➤	Global	6
Workplace as an expense	➤	Workplace as and investment	7



Harmony  Identity

1



6 key shifts

China



Harmony > Identity 1
Security > Growth 2



6 key shifts

China



Harmony ➤ **Identity** 1

Security ➤ **Growth** 2

Work & life ➤ **Work & living** 3



6 key shifts

China



- | | | | |
|-------------|---|---------------|---|
| Harmony | ➤ | Identity | 1 |
| Security | ➤ | Growth | 2 |
| Work & life | ➤ | Work & living | 3 |
| Teamwork | ➤ | Collaboration | 4 |



6 key shifts

China



Harmony > Identity 1

Security > Growth 2

Work & life > Work & living 3

Teamwork > Collaboration 4

Supporting the work > Supporting the worker 5

6 key shifts

China



Harmony > **Identity** 1

Security > **Growth** 2

Work & life > **Work & living** 3

Teamwork > **Collaboration** 4

Supporting the work > **Supporting the worker** 5

Worker > **Explorer** 6

Key shifts compared

US

India

China

Conformity	Identity	Inherited Identity	Created Identity	Harmony	Identity
Training	Growth	Job Security	Growth	Teamwork	Collaboration
Work	Work-Life	WORK-life	WORK-LIFE	Security	Growth
Collaboration	Connections	Connections	Collaborations	Supporting the Worker	Supporting the Worker
Achievement through career	Work does not	Service	Core Competencies	Worker	Explorer
Office is primary workplace	The workplace is where "I" am	Local	Global	Work & Life	Working & Living
Technology is a tool	Technology is extension of me	Workplace as an expense	Workplace as an investment		
Trust is developed in person	Trust can be developed offline & online				



Design Principles

Design for Identity

US Identity

- Provide spaces that reflect “Me”
- Provide environments that are socially conscious

India Identity

- It's about recognizing the individual
- It's about supporting individuals in the process of change

China Identity

- It's about encouraging employees to express their identity

Design for Growth

US Growth

- Provide organizational transparency
- Support personal growth through constant feedback and mentoring opportunities

India Growth

- It's about actively helping employees in their development
- It's about providing opportunities

China Growth

- It's about providing environments for learning
- It's about actively helping employees in their development
- It's about being transparent

Design for WorkLife Balance

US WorkLife

- Reflect work-lifestyle integration (intertwine work & life)
- Match cognitive intensity

India WorkLife

- It's about providing flexibility and tools for working outside the office
- It's about creating social opportunities for families at work
- It's about acknowledging the personal life of employee

China WorkLife

- It's about supporting life beyond work
- It's about adding fun to work and work-life

Design for Collaboration

US Collaboration

- Leverage social networks
- Design with technology in mind

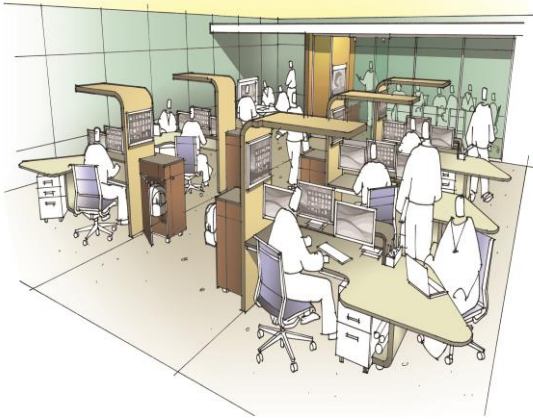
India Collaboration

- It's about transparency
- It's about providing for networking opportunities
- It's about promoting the expression of ideas

China Collaboration

- It's about allowing teams to be together while maintaining individual privacy
- It's about providing various team settings
- It's about fostering social interaction as a team
- It's about encouraging and allowing people to share their points of view

Identity



US



India



China

Growth



US

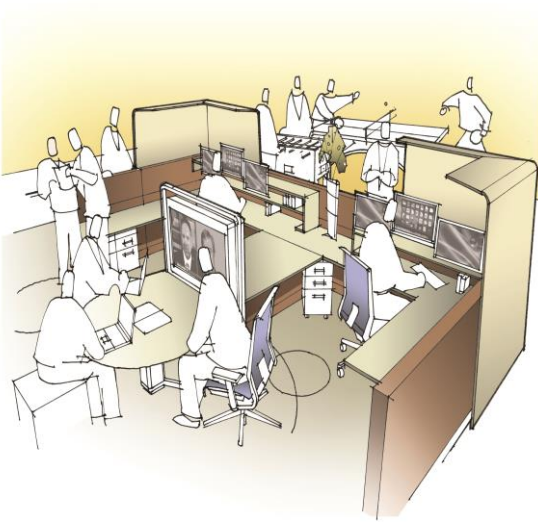


India



China

WorkLife balance



US



India



China

Collaboration



US



India



China

Business is global

Gen Y is our customer, employee and future employer

To get the best out of them we need to design environments that are in sync with local needs and behaviors

What are the 4 key areas researched to help us understand Gen Y more clearly?

Culture, Politics, Economics, Technology

What is the equivalent of GenY in China (in years)?

Post 80's – 1980 through 1990

What is the most individualistic country in the world?

United States of America

Which country recently invested heavily in infrastructure to bring internet to all parts of the country?

China

What are key similar characteristics of GenY and the Post 80's Generations?

Tech Savvy, Self-centered, Confident, Creative, Open-minded, Risk Takers, Eager to Learn/Grow

Many of the values of GenY in the US are centered around _____.

Being effective

Many of the values of GenY in the India are centered around _____.

Competition and Growth

Many of the values of GenY in the China are centered around _____.

Social impacts of the work

Gen Y is our future.