Generation Y in the Workplace: US, India & China

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

Geert Hofstede’s Model of Cultural Dimensions

US        India        China

Understanding         Research         Findings
Culture, Politics, Economics, Technology
## Understanding GenY and Post-80s in context

### Culture

<table>
<thead>
<tr>
<th>US</th>
<th>India</th>
<th>China</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nation of immigrants</td>
<td>Multi-cultural and multi-religious society for thousands of years</td>
<td>Confucian education = respect for authority</td>
</tr>
<tr>
<td>Extreme individualism is a strength and a weakness</td>
<td>Tremendous loyalty towards immediate family</td>
<td>“Guanxi” = relationships and social connections</td>
</tr>
<tr>
<td>Demographics:</td>
<td>Cricket unifies a country of differing cultures</td>
<td>Brand recognition is key to most purchase decisions</td>
</tr>
<tr>
<td>Fragmented and Local: sports, politics</td>
<td>Country of dreamers; everyone aspires to better themselves</td>
<td>Modernizing, but not Westernizing</td>
</tr>
<tr>
<td>National: fast food, obesity, healthcare, etc.</td>
<td>Western aspirations in conflict with traditional values</td>
<td>Tech-savvy and urban, yet traditional Chinese</td>
</tr>
</tbody>
</table>
### Understanding GenY and Post-80s in context

#### Politics

<table>
<thead>
<tr>
<th>US</th>
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</thead>
<tbody>
<tr>
<td>Switch between engagement with and isolation from the world</td>
<td>10+ political parties</td>
<td>Historically, government was isolated from world</td>
</tr>
<tr>
<td>1950s: space race, growing prosperity</td>
<td>Co-founder of the Non-Aligned Movement, and also a nuclear power</td>
<td>Return of Hong Kong, then economic reforms</td>
</tr>
<tr>
<td>1960s: Vietnam war</td>
<td>1991 reforms opened India to global trade</td>
<td>Growing national pride</td>
</tr>
<tr>
<td>1970s: Nixon</td>
<td>Politics are chaotic, with bureaucracy and corruption</td>
<td>British rule of Hong Kong</td>
</tr>
<tr>
<td>1980s: Conservative</td>
<td>Influenced by illiteracy, poverty, unemployment and religious diversity</td>
<td>Hong Kong is “Special Administrative Region”; one country, two systems</td>
</tr>
<tr>
<td>1990s: Iraq War 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2000s: 9/11</td>
<td>war</td>
<td>Obama</td>
</tr>
</tbody>
</table>

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*Understanding | Research | Findings*
## Understanding GenY and Post-80s in context

### Economics

<table>
<thead>
<tr>
<th>US</th>
<th>India</th>
<th>China</th>
</tr>
</thead>
<tbody>
<tr>
<td>Largest economy</td>
<td>4th largest economy; 1991 economic reforms led to economic boom</td>
<td>2nd largest economy</td>
</tr>
<tr>
<td>Rising prosperity since 1950s</td>
<td>Asia's largest outsourcing industry and auto industry</td>
<td>Removal of travel restrictions in 1983</td>
</tr>
<tr>
<td>Not a nation of savers – no future-thinking</td>
<td>Almost 3000 MNCs (37% are US companies)</td>
<td>More opportunities for higher education at home and abroad</td>
</tr>
<tr>
<td>2010 US Census Bureau reported over $886 billion in debt</td>
<td>Rising entrepreneurism, growing competition, and reduced political interventions</td>
<td>Growing middle class</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Hong Kong one of the three busiest ports in the world</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Hong Kong is world's freest economy</td>
</tr>
</tbody>
</table>
# Understanding GenY and Post-80s in context

## Technology

<table>
<thead>
<tr>
<th>Country</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>US</strong></td>
<td>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)</td>
</tr>
<tr>
<td><strong>India</strong></td>
<td>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)</td>
</tr>
<tr>
<td><strong>China</strong></td>
<td>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</td>
</tr>
</tbody>
</table>
Human-Centered Design Process

- Conduct secondary research
- Understand
- Conduct primary research
- Observe
- Photography and ethnography
- Synthesis
- Contextual interviews
- Realize
- Engage users in exercises
- Prototype
- Look for patterns
- Measure
- Develop design principles
- Develop thought starters

Understanding | Research | Findings
Timeline Activity – Any generation is more than just a set of dates
Generations are defined differently around the world

**US**

<table>
<thead>
<tr>
<th>Generations</th>
<th>Date Range</th>
<th>Characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baby Boomers</td>
<td>(1945 – 64)</td>
<td>Experienced increasing economic opportunity, social equality. Optimistic</td>
</tr>
<tr>
<td>Gen X</td>
<td>(1965 – 79)</td>
<td>Global Thinkers. Technology innovators</td>
</tr>
<tr>
<td>Gen Y</td>
<td>(1980 – 2000)</td>
<td>Tech savvy and connected. Focused on social, environmental, and global issues</td>
</tr>
</tbody>
</table>
Generations are defined differently around the world

India

<table>
<thead>
<tr>
<th>Generation</th>
<th>Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freedom Fighters</td>
<td>(1900 – 46)</td>
</tr>
<tr>
<td>Personal needs were sacrificed; country came first</td>
<td></td>
</tr>
<tr>
<td>Loyalty and adherence to “traditional” divisions of society</td>
<td></td>
</tr>
<tr>
<td>Older Generation</td>
<td>(1947 – 64)</td>
</tr>
<tr>
<td>Adapted to Gandhi’s “Less is More” philosophy and lifestyle</td>
<td></td>
</tr>
<tr>
<td>Part of the Green and White revolution, building a nation</td>
<td></td>
</tr>
<tr>
<td>Gen X</td>
<td>(1965 – 79)</td>
</tr>
<tr>
<td>Focused on education</td>
<td></td>
</tr>
<tr>
<td>Open to diverse perspectives but lack of opportunities led to brain drain</td>
<td></td>
</tr>
<tr>
<td>Global awareness around trends, brands, technology, innovations, entertainment, etc.</td>
<td></td>
</tr>
<tr>
<td>Crave for latest and greatest technology</td>
<td></td>
</tr>
</tbody>
</table>
Generations are defined differently around the world

### China

<table>
<thead>
<tr>
<th>Generation</th>
<th>Range</th>
<th>Characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Traditionals</strong></td>
<td>1928 – 45</td>
<td>Lived through war &amp; independence, survival was main concern</td>
</tr>
</tbody>
</table>
| **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

**1940-2009**
- 1940
- 1950
- 1960
- 1970
- 1980
- 1990
- 2000
- 2005
- 2009

**Technology**
- TV
- walk on the moon
- computer
- Internet
- iPods
- alternative energy

**Culture**
- Elvis
- Beatles
- divorce rates rise
- laptops
- YouTube
- Twitter

**Politics**
- JFK assassination
- Vietnam War
- Berlin Wall
- 9/11
- Bush vs. Osama bin Laden
- Obama election

**Economy**
- Google

Understanding | Research | Findings
Generations: what memories do they share?

India

<table>
<thead>
<tr>
<th>Traditionals 1945-64</th>
<th>Gen X 1965-80</th>
<th>Gen Y 1980-2000</th>
</tr>
</thead>
</table>

Technology

- IITS open
- TV
- iPhone

Culture

- India wins World Cup
- Cricket World Cup & Sachin Tendulkar
- AR Rahman
- 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

Understanding | Research | Findings
Generations: what memories do they share?

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


Technology
- Shenzhou VI – 1st Chinese Spacewalk

Culture
- Cultural Revolution
- SARS
- Beijing Olympics

Politics
- June 4th Event
- 9/11
- Macau returns to China
- Sichuan Earthquake

Economy
- Founding of the PRC
- Economic Reform
- China enters WTO
- Economic Crisis

Understanding | Research | Findings
### 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
Key behaviors

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
Key behaviors

India

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
Key behaviors

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

<table>
<thead>
<tr>
<th><strong>US</strong></th>
<th><strong>India</strong></th>
<th><strong>China</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Collaboration</td>
<td>Recognition and reward</td>
<td>Good reputation</td>
</tr>
<tr>
<td>Connectedness – constant communication</td>
<td>Growth opportunity</td>
<td>Friendly environment</td>
</tr>
<tr>
<td>Creativity</td>
<td>Entertainment</td>
<td>Relaxed environment</td>
</tr>
<tr>
<td>Responsibility</td>
<td>Convenience</td>
<td>Personal office</td>
</tr>
<tr>
<td>Speed</td>
<td>Sense of achievement</td>
<td>User-centered</td>
</tr>
<tr>
<td>Diversity</td>
<td>Responsibility</td>
<td>Happiness</td>
</tr>
<tr>
<td>Comfort</td>
<td>Teamwork</td>
<td>Culture of equality and support</td>
</tr>
<tr>
<td>Drive to do well</td>
<td>Open Culture</td>
<td>Work-life balance</td>
</tr>
<tr>
<td>Efficiency</td>
<td>Commitment</td>
<td>Learning</td>
</tr>
<tr>
<td>Fun</td>
<td>Low stress</td>
<td>Social events at work</td>
</tr>
</tbody>
</table>

Understanding  | Research  | Findings
What we heard and saw
Work is 24/7 and global

US | India | China

Understanding | Research | Findings
Social networking is an important part of work
What we heard and saw
Learning & growth are pursued as a means to further one’s career
Gen Y is eager to express their identity
What we heard and saw

Work-life
Gen Y gravitates to 3\textsuperscript{rd} places – but not for the same reasons
Socialization is an integral part of work and work life.
Gen Y expects their company to help reduce stress
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.
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
<table>
<thead>
<tr>
<th>Collage making exercise</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ideal work environment</strong></td>
</tr>
<tr>
<td><strong>US Gen Y</strong></td>
</tr>
<tr>
<td><strong>Top word choices</strong></td>
</tr>
<tr>
<td>Active</td>
</tr>
<tr>
<td>Flexible</td>
</tr>
<tr>
<td><strong>Top image choices</strong></td>
</tr>
<tr>
<td><img src="image1.png" alt="Image" /></td>
</tr>
</tbody>
</table>
What we’ve learned
8 key shifts

Conformity ➔ Identity
8 key shifts

Conformity ➔ Identity
Training ➔ Growth

Understanding | Research | Findings
8 key shifts

1. Conformity
2. Training
3. Work
4. Identity
5. Growth
6. Work-life
7. Understanding
8. Research

Findings
8 key shifts

1. Conformity
2. Training
3. Work
4. Collaboration

Identity
Growth
Work-life
Connections
8 key shifts

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

Conformity ➔ Identity

Training ➔ Growth

Work ➔ Work-life

Collaboration ➔ Connections

Personal achievement is through my career ➔ Work does not identify me

The office is my primary workspace ➔ The office is where “I” am
8 key shifts

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

Technology is a tool  ➔  Technology is an extension of me  ➔  7
8 key shifts

1. Conformity ➔ Identity
2. Training ➔ Growth
3. Work ➔ Work-life
4. Collaboration ➔ Connections

- Personal achievement is through my career
- The office is my primary workspace
- Technology is a tool

- Work does not identify me
- The office is where “I” am
- Technology is an extension of me

- Trust is developed in person
- Trust is developed online & offline
7 key shifts

Inherited identity ➤ Created identity
7 key shifts

Conformity ➔ Identity
Job security ➔ Growth

India

Understanding | Research | Findings
7 key shifts

Inherited identity  Created identity
Job security  Growth
Work-life  Work-LIFE

India
7 key shifts

Inherited identity | Created identity
Job security | Growth
Work-life | Work-LIFE
Connections | Collaborations

India
7 key shifts

1. Inherited identity
2. Created identity
3. Job security
4. Growth
5. Work-life
6. Work-LIFE
7. Connections
8. Collaborations
9. Service
10. Core competencies

India
7 key shifts

Inherited identity ▶ Created identity
Job security ▶ Growth
Work-life ▶ Work-LIFE
Connections ▶ Collaborations
Service ▶ Core competencies
Local ▶ Global

India

Understanding | Research | Findings
7 key shifts

India

- Inherited identity
- Created identity
- Job security
- Growth
- Work-life
- Work-LIFE
- Connections
- Collaborations
- Service
- Core competencies
- Local
- Global
- Workplace as an expense
- Workplace as an investment
China

6 key shifts

Harmony ➔ Identity

Understanding | Research | Findings
6 key shifts

Harmony  Identity

Security  Growth

China

Understanding  |  Research  |  Findings
6 key shifts

Harmony ➤ Identity 1
Security ➤ Growth 2
Work & life ➤ Work & living 3

China

Understanding | Research | Findings
6 key shifts

Harmony  Identity  1
Security  Growth  2
Work & life  Work & living  3
Teamwork  Collaboration  4
6 key shifts

Harmony → Identity 1
Security → Growth 2
Work & life → Work & living 3
Teamwork → Collaboration 4
Supporting the work → Supporting the worker 5

China
6 key shifts

Harmony ➔ Identity 1
Security ➔ Growth 2
Work & life ➔ Work & living 3
Teamwork ➔ Collaboration 4
Supporting the work ➔ Supporting the worker 5
Worker ➔ Explorer 6

China
### Key shifts compared

<table>
<thead>
<tr>
<th>US</th>
<th>India</th>
<th>China</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conformity</td>
<td>Identity</td>
<td>Harmony</td>
</tr>
<tr>
<td>Training</td>
<td>Growth</td>
<td>Identity</td>
</tr>
<tr>
<td>Work</td>
<td>Work-Life</td>
<td>Teamwork</td>
</tr>
<tr>
<td>Collaboration</td>
<td>Inherited Identity</td>
<td>Collaboration</td>
</tr>
<tr>
<td>Achievement through career</td>
<td>Job Security</td>
<td>Growth</td>
</tr>
<tr>
<td>Office is primary workplace</td>
<td>WORK-life</td>
<td>Security</td>
</tr>
<tr>
<td>Technology is a tool</td>
<td>Connections</td>
<td>Supporting the Work</td>
</tr>
<tr>
<td>Trust is developed in person</td>
<td>Service</td>
<td>Worker</td>
</tr>
<tr>
<td>The workplace is where “I” am</td>
<td>Collaborations</td>
<td>Explorer</td>
</tr>
<tr>
<td>Technology is extension of me</td>
<td>Core Competencies</td>
<td>Working &amp; Living</td>
</tr>
<tr>
<td>Trust can be developed offline &amp; online</td>
<td>Local</td>
<td></td>
</tr>
<tr>
<td>Workplace as an expense</td>
<td>Global</td>
<td></td>
</tr>
<tr>
<td>Workplace as an investment</td>
<td>Work &amp; Life</td>
<td></td>
</tr>
</tbody>
</table>

Understanding | Research | **Findings**
Design Principles
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 Principles

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 Principles

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 Principles

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

Understanding  |  Research  |  Findings
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.