



Oxygenz Country Report: Germany

**Understanding the
Generation Y in Germany:**

**How would they like
to work in 2010?**



work how you like





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Executive Summary

The Oxygenz survey in Germany gathered 1479 respondents, including 841 between the age of 18 and 25 years old. The German survey was specially conducted online via the survey website www.oxygenz.com from the 17th January to 7th February 2010 to gather a significant sample of respondents and compared it against our 2009 global benchmark. To date, the German Generation Y (841) sample makes up for 24 percent of the total Generation Y sample which globally attracted 3509 respondents within this age group.

We are looking at a generation which is concerned about the way they will work. The results have shown that their preferences and expectations vary some greatly with other countries we studied and used here as a benchmark (United States, India, China, United Kingdom). These variations are:

- Why they choose an employer – Compensation comes first before learning opportunities
- Where they want to work – City location
- How they want to travel to work – After Car comes Cycling
- What environment they aspire to work in – far from classical and pale, more vibrant and light
- What pattern for work they prefer - Mobile and Flexible
- How they want to collaborate – formally in meeting rooms and as a team in dedicated team spaces
- How they want their employer to be – more than just environmentally friendly and showing it

The implications for employers are significant and they must respond to, or at least consider, their needs:

- **Physical:** into the Workplace itself and the location, shape, size, design
- **Human:** more flexible contractual arrangements through their pattern of work, their mobility on site
- **Ethical:** employers have to be greener, more environmentally friendly rather than aware
- **Emotional:** create a sense of community, team spirit and well being

From 2000 to 2050 it is anticipated that the German working population will reduced by 30%¹. If employers want to attract and retain young talent, they will need to consider the following results.

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¹. Herwig Birg, Population expert, 2007



Introduction

The Generation Y: Like How They Work – Work How They Like

People aged 18 between 25, who are also known as Generation Y, are the newest and youngest members of our work forces. All over the world Generation Y is making their presence felt, causing businesses to rethink their working practices and starting new waves of social and business transformation. They are a remarkable generation and in our view, there are at least six reasons why we need to understand them, and how they relate to work:

- There are not enough of them coming into the workforce and the working population is already shrinking
- They are transformational: They are challenging common and established working practices, embracing communication applications like social networks to using the latest technologies
- They do things differently: They are agile – multi-taskers
- They are techno-savvy: They want and have the latest technology, like iPhones and iPods, they are regular Skypers

The Generation Y apparently believes they can achieve anything. They are leadership focused, collaborative and seek meaning in work and opportunity to learn. Natives of the digital world, they are frequently portrayed as demanding, selfish, text-addicted and job-hoppers with little loyalty to their employers. Besides, they are more urban focused and buy quickly into new concepts and ideas.

In Germany the Generation Y are under more financial pressure than the previous German generations. The German Generation Y has grown up with green issues into their way of living. But how different is the German Generation Y at work compared to others around the world?

Oxygenz focuses on:

- Workplace: the physical environment in which we work
- Workspace: the individual space in which we work
- Ways of Working: the way we arrange our working day
- Real Estate & Facilities Management Services: the level of support services in the working environment
- Creativity & Productivity: the triggers that enhance creativity and productivity

What is...

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OXYGENZ is a large-scale research project, which will make a significant contribution to companies' knowledge on how they might use their real estate and facilities as strategic assets to attract and retain scarce talent. We must attach a great importance to diversity in our workplaces and the factors that must be taken into account when considering workplace as a likely strategic weapon in the battle to attract and retain scarce young talent.

Methodology

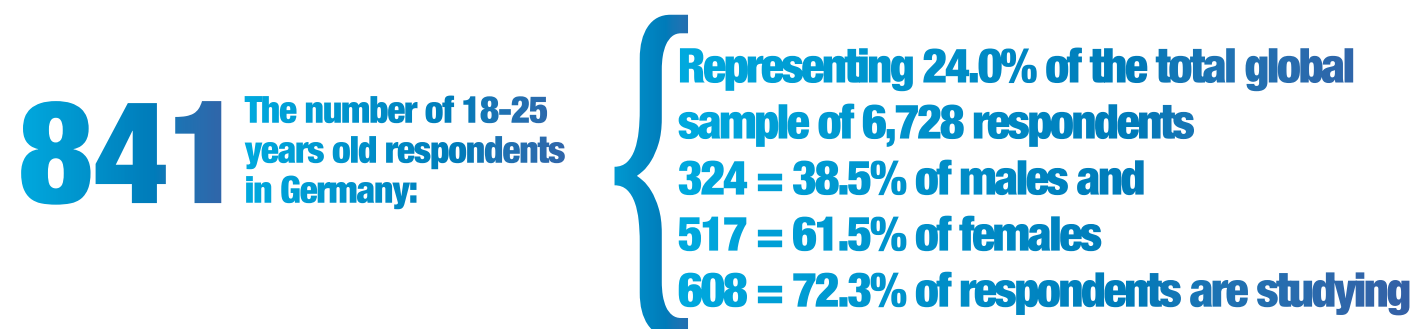
The German survey was specially conducted online via the survey website www.oxygenz.com from 17th January to 7th February 2010. The objective was to gather a significative sample of respondents in Germany and compare it against our global benchmark, calculated in December 2009 and published in our Oxygenz Global Report.



The global survey included special samples on the Generation Y (18-25 years old) in:



To date, the German Generation Y sample (841) makes up for 24 percent of the total Generation Y sample which globally attracted 3509 respondents. The profile of our Generation Y...



Research Question:

Generation Y and the Workplace is a research project that seeks to understand the importance the 18 to 25 years old attach to their future workplace.

How important is the workplace in attracting, recruiting and retaining Generation Y workers and what factors contribute to talent management per industry sector, country and gender?

The respondents were gathered over a 3 week period via a viral advertising campaign which directly targeted the respondents within this specific age group:

- On-line campaign on the Johnson Controls website
- On-line advertising on the social network Facebook in Germany
- On-line advertising on Google
- Direct marketing and incentives with a population of 18 - 35 years old in collaboration with Panelbiz (www.panelbiz.com)

Oxygenz Partners



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University of Pretoria
University of the West of England
University of Wisconsin
Wellingkar Institute



Who is the Generation Y in the Germany?

In Germany, Generation Y (18 to 25 years) makes up approximately 15% of today's population¹. Like their peers around the world they are non-conformist, value driven, innovative and challenging. Over the next 10 to 15 years Germany's ageing population, the Baby Boomers, will retire and will leave a significant gap in the labour market. As the German population is getting older and as the birth rate has shrunk to 1.3 in 2009, it is anticipated that from 2000 to 2050 the workforce will be reduced by 30%. With a population that counted more than 50% of 40+ year olds in 2005, officials say that the German workforce is now officially shrinking². However, if this demographic trend continues over 25 in this direction, it will take 75 years to stop this process³.

In Germany, the generation Y is regarded as the "generation internship" – young academics, highly educated, with a university degree, but very little income and huge problems to enter the job market

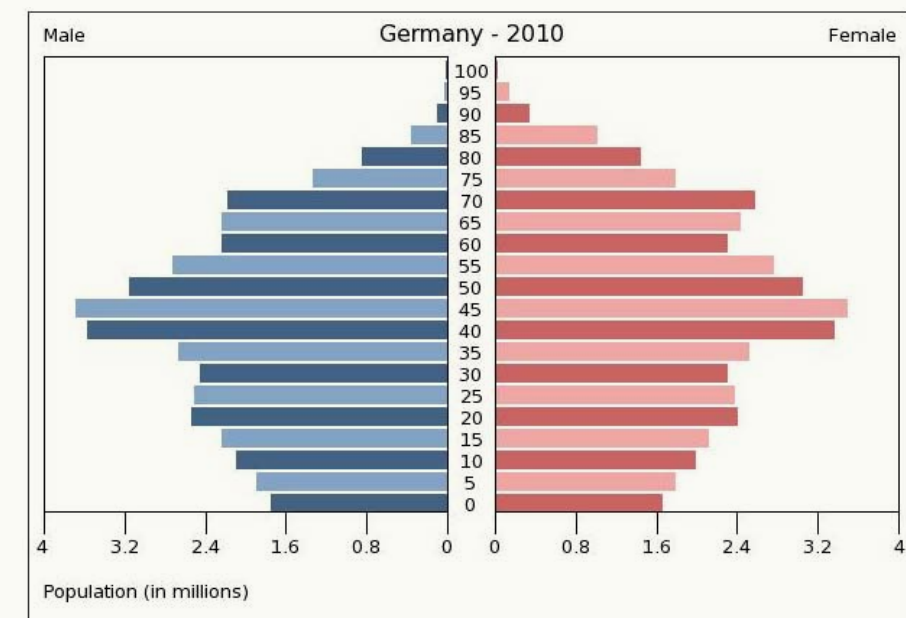


Figure 1: German Demographic Pyramid, 2010 – Source – US Census Bureau

The future population of Germany will require a high quality of life until a late age and would expect both mental and physical fitness. More women will be working and the German society and corporations will be more diverse. The work-life balance in German society will remain an important value. It is expected that the Generation Y will dominate the workforce for the next half a century. Employment opportunities will rise again, thereby creating an economically attractive market for the Generation Y, which will continue to educate themselves, creating a highly technical skilled labour force, which seeks to intellectual challenge⁴.

¹ US Census Bureau, International Database, February 2010

² Froehlich, Robert, J., Froehlich, Bob, (2006), Investment Megatrends, New Jersey, USA, John Wilkes & Sons

³ Herwig Birg, Population expert, 2007

⁴ Fraunhofer Institute, Office 21 Project, 2008 and IAB, 2005

Oxygenz Germany Results for the Generation Y:

841 841 The number of 18-25 years old respondents in Germany:

Representing 24.0% of the total global sample of 6,728 respondents
 324 = 38.5% of males and
 517 = 61.5% of females
 608 = 72.3% of respondents are studying

Location

70% would prefer to work in an urban setting

A modern or contemporary style with subtle, clinical and relaxing colours

42% would prefer only natural light in their working environment

73% prefer to work in a mobile way but 89% would like to personalise their individual space

Q What individual workspace would you prefer to have?

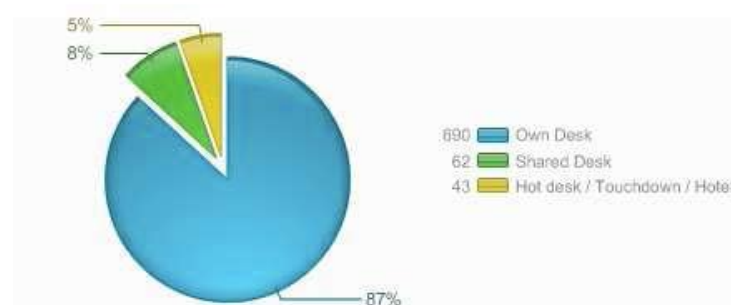


Figure 2: Germany: 18 - 25 years old individual space preferences

Q What pattern of work would you like to have?

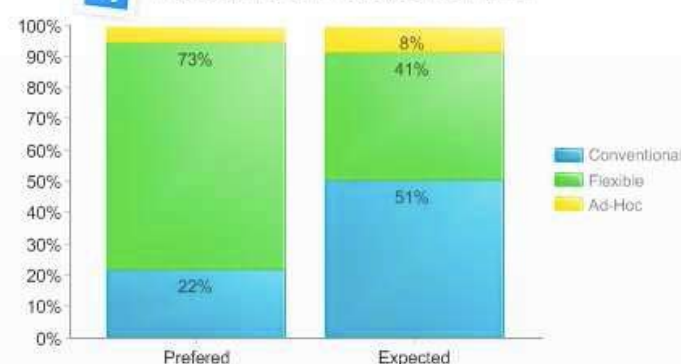


Figure 3: Germany: 18 - 25 years old preferences and expectations for working patterns

47% would prefer to have an employer which provides a workplace which goes beyond environmentally friendly

Travel

31% by car, of which 30% would prefer to drive a hybrid car

26% cycling

4% by motorcycle or scooter

23% by public transport

16% by walking

Top 3 priorities when choosing an employer:

1. Compensation
2. Work Colleagues
3. Meaningful work



Q What collaborative environment would you prefer to have?

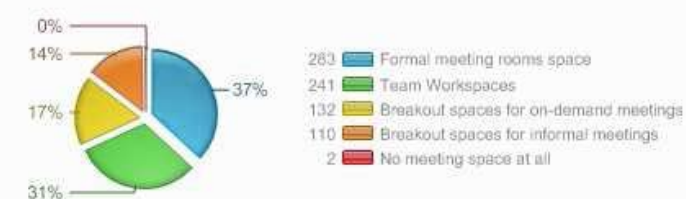


Figure 4: Germany: 18 - 25 years old preferred collaborative working environment

Workspace

60% would be comfortable in a space of 12 to 16 sqm

Wooden floors are preferred by 75%
 74% prefers to have a little art in their workspace

FM & Support Services

Q What social facilities would you prefer to have at work?

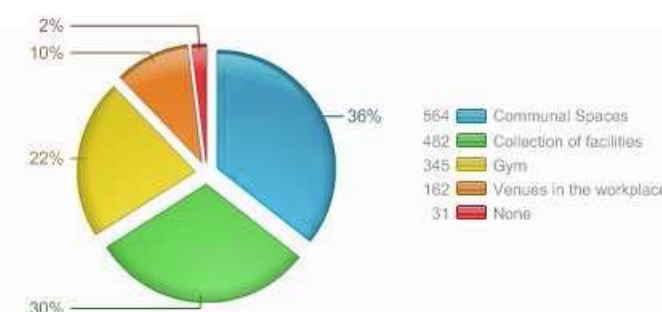


Figure 5: Germany: 18 - 25 years old preferred reception services

Facilities & Support Services:

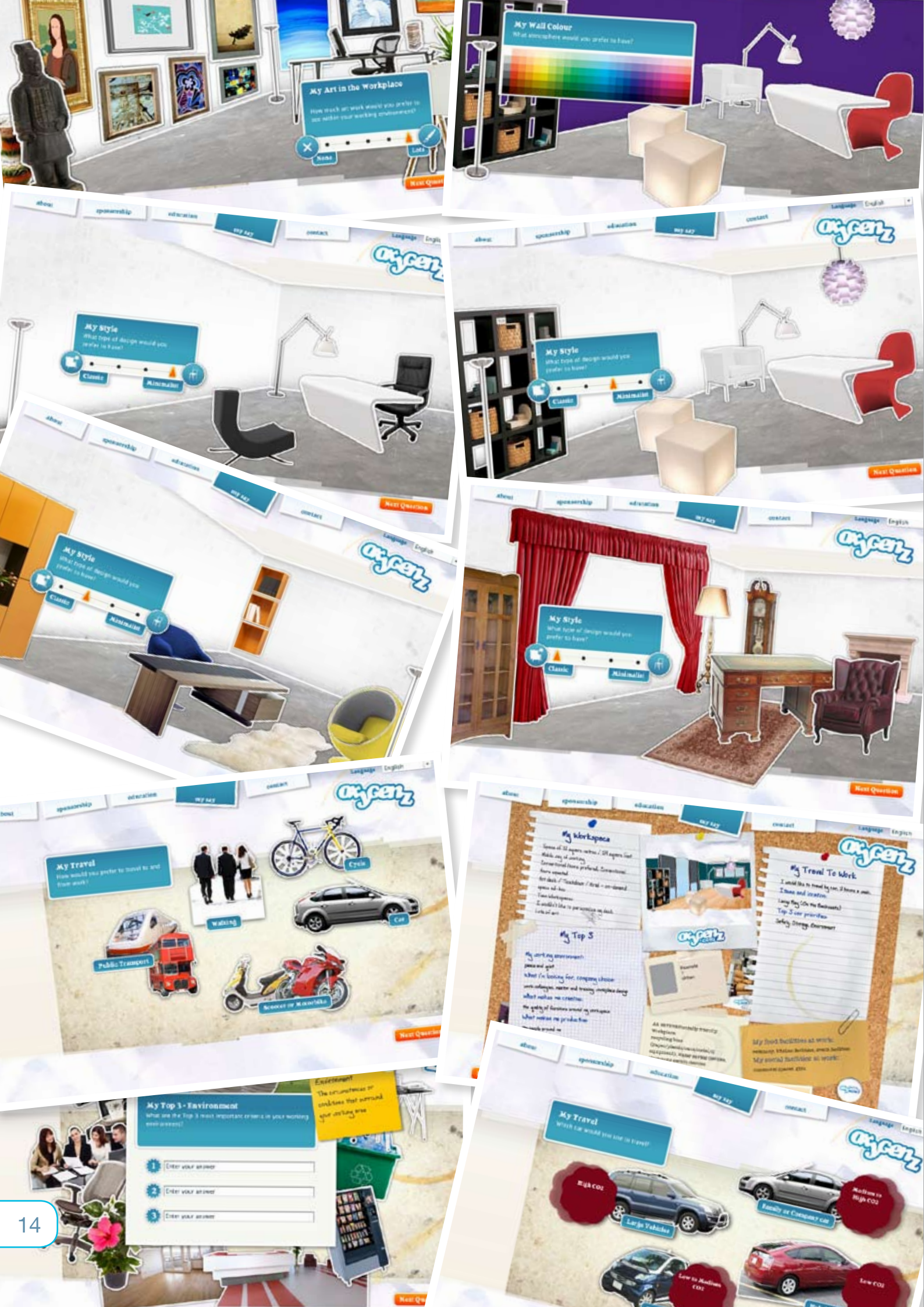
56% would prefer to have a 5 star reception services or above and 75% would like to have a refectory whilst 22% prefers to have access to a coffee shop

Top 3 factors for creativity:

1. The people around me
2. The ambiance & atmosphere
3. Workspace around me

Top 3 factors for productivity

1. Technology in my office
2. The people around me
3. Workspace around me



Results Analysis

The following pages present the results of the analysis of the German Generation Y sample (841 respondents between the age of 18 and 25 years old) and compare and contrast these German results against our global results.

The German Generation Y has very different expectations compared to our worldwide sample and results diverge greatly with other countries we studied.

High on the agenda of priorities of the Generation Y in Germany, Compensation is a priority when choosing a company. Compensation has never been one of the top three priorities amongst our respondent aged 36 and less. This criteria of choice usually appears for older generations, demonstrating the concerns this age group has about work. Compared to other age groups we benchmark our German sample against, Opportunities for Learning is a clear top choice, but only in 6th position for the German Generation Y.

Triggers of productivity and creativity are very difficult to assess and often depend on qualitative issues around people at work. The German Generation Y is no different from our global sample: People + Ambiance & Atmosphere + Technology is still the magic formula to trigger productivity and creativity. The workplace (this ambiance & atmosphere) is very central to their choice, on one hand moving towards people to boost creativity and towards technology to boost productivity. But it is fascinating to note that this time the workspace itself, as a place of course to meet and work, and a place to learn, where knowledge is gathered, seems to impact on creativity and productivity.

These results support how crucial the right working environment is to influence people performance. The workplace is considered here critical to the Generation Y in Germany. Location and travel choices also show that a city office should be priority of choice for Real Estate decision makers and Human Resources managers. Attracting people to cities and choosing an urban environment seems to be key to attract and retain young employees. However 31% still prefer a rural to semi rural setting, showing again a wide range of demands.

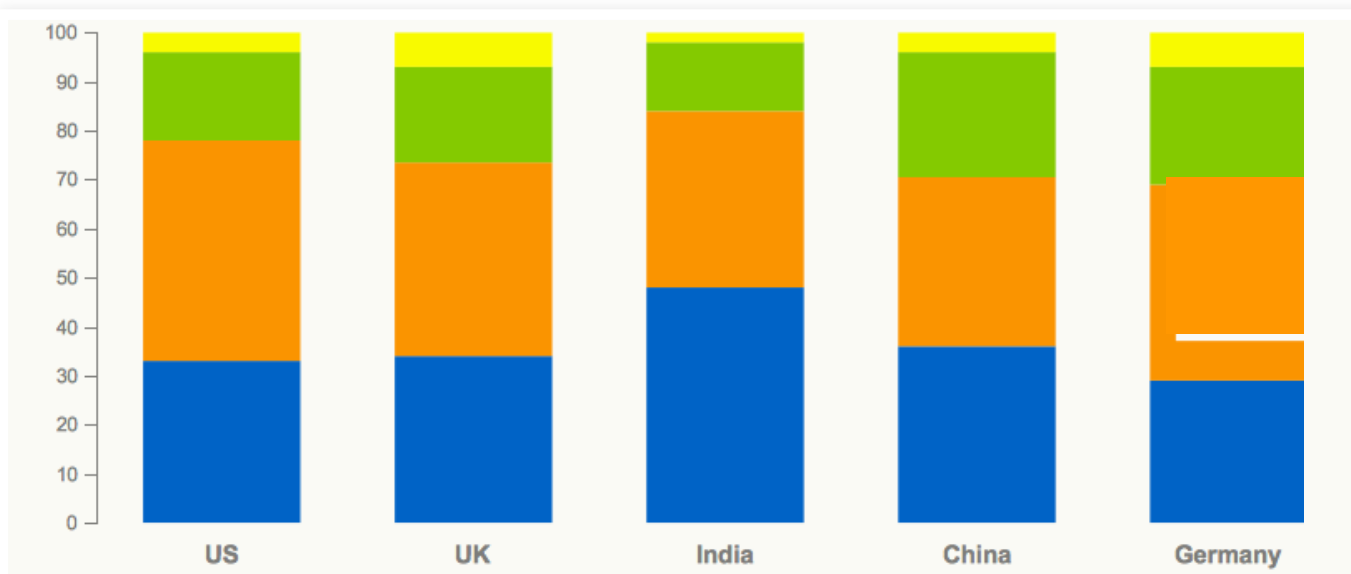


Figure 6: Location of the place to work, per country, 18-25 years old

Results Analysis Continued

31% of the 18-25 years old in Germany would chose a car to go to work against more (38%) of the 26 to 35 years old. However, this figure is far less than in the US (52%) and India (49%) and even the UK (34.5%). We are looking at a generation of youngsters embracing green travel: 26% would cycle to work, 16% would walk to work and 23% would use public transport.

With this new green way of going to the office, again the Generation Y in Germany is expecting far more flexibility in their working patterns: 76% prefer their employers to offer flexible working but only 41% are expecting their employers to offer it. A message sent out to Human Resources Directors will be to consider offering more flexibility in the working arrangements and making it clearly more visible to employees. This difference between expectations and preferences needs to be addressed by HR. The level of mobility is however aligned to our worldwide benchmark, with 73% of the Generation Y in Germany who have expressed a desire to be mobile, rather than static always at a desk.

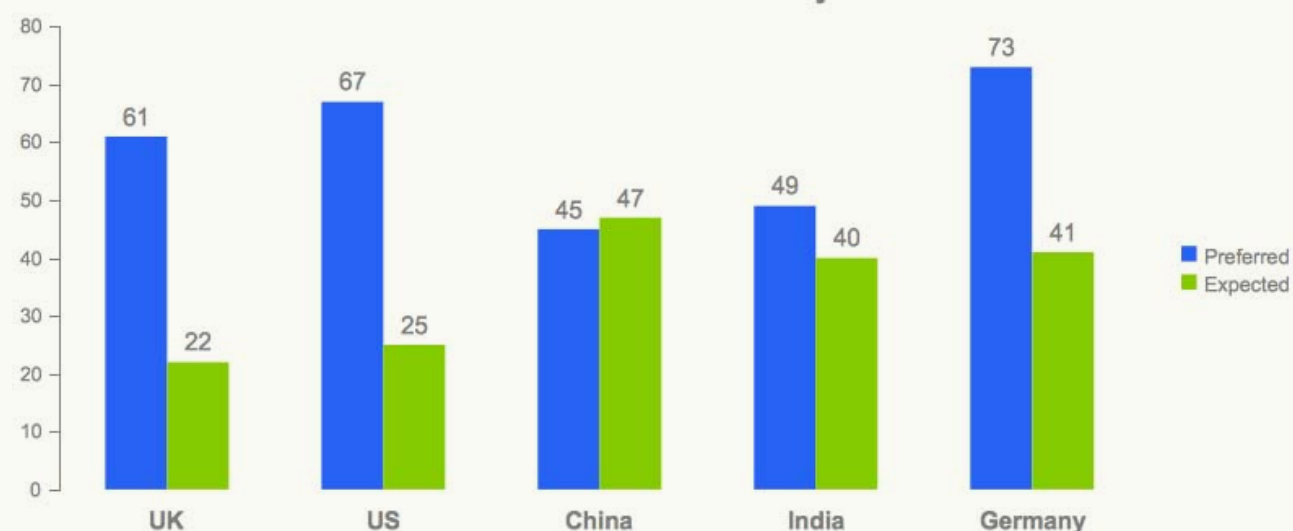


Figure 7: Flexible Pattern of Work, 18-25 years old, per country

While the majority of the Generation Y in Germany prefers a modern workplace interior with subtle, clinical and relaxing colours in their working environment, 21% wants vibrant/bright colours. The ambiance & atmosphere we mentioned earlier is created partly by the design of the workplace, the interior arrangements. Soft and natural finishes are also a tendency for this age group, clearly looking for an inviting environment, open and light. These results for German match the worldwide results, but tend to show greater aspiration for a natural and stimulating environment: modern environment, open, light, with some sparks of colours, natural finishes like wood.

This emotional engagement with their workplace is also expressed in their desire to personalise their workspace: 89% of the 18 to 25 years old in Germany want to personalise their workspace! Again not surprising as 87% want to have their own desk and only 8% want to share a desk, leaving few opportunities to maximise desk to people ratios anywhere close to 1 desk to 2 people.

These results are above our worldwide benchmark for this age group and very different from China (55%), the UK (65%), India (76%) and even the US (80%). The large majority of respondents in Germany also tells us that they are comfortable in much larger space than other countries (60% feel comfortable in a space of 12sqm to 16sqm metres).

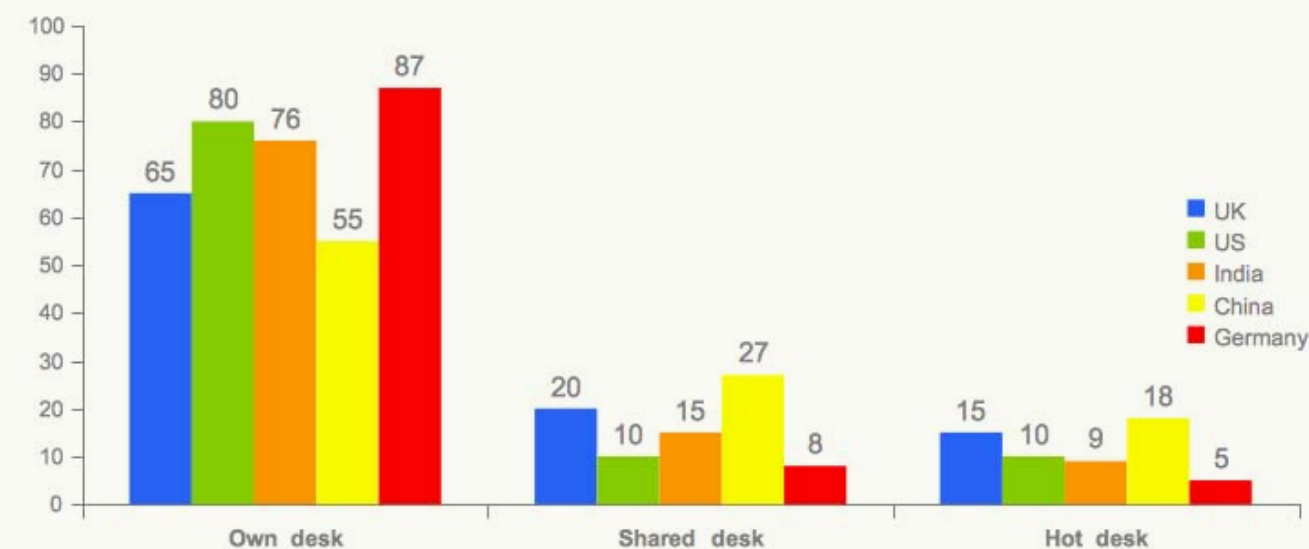
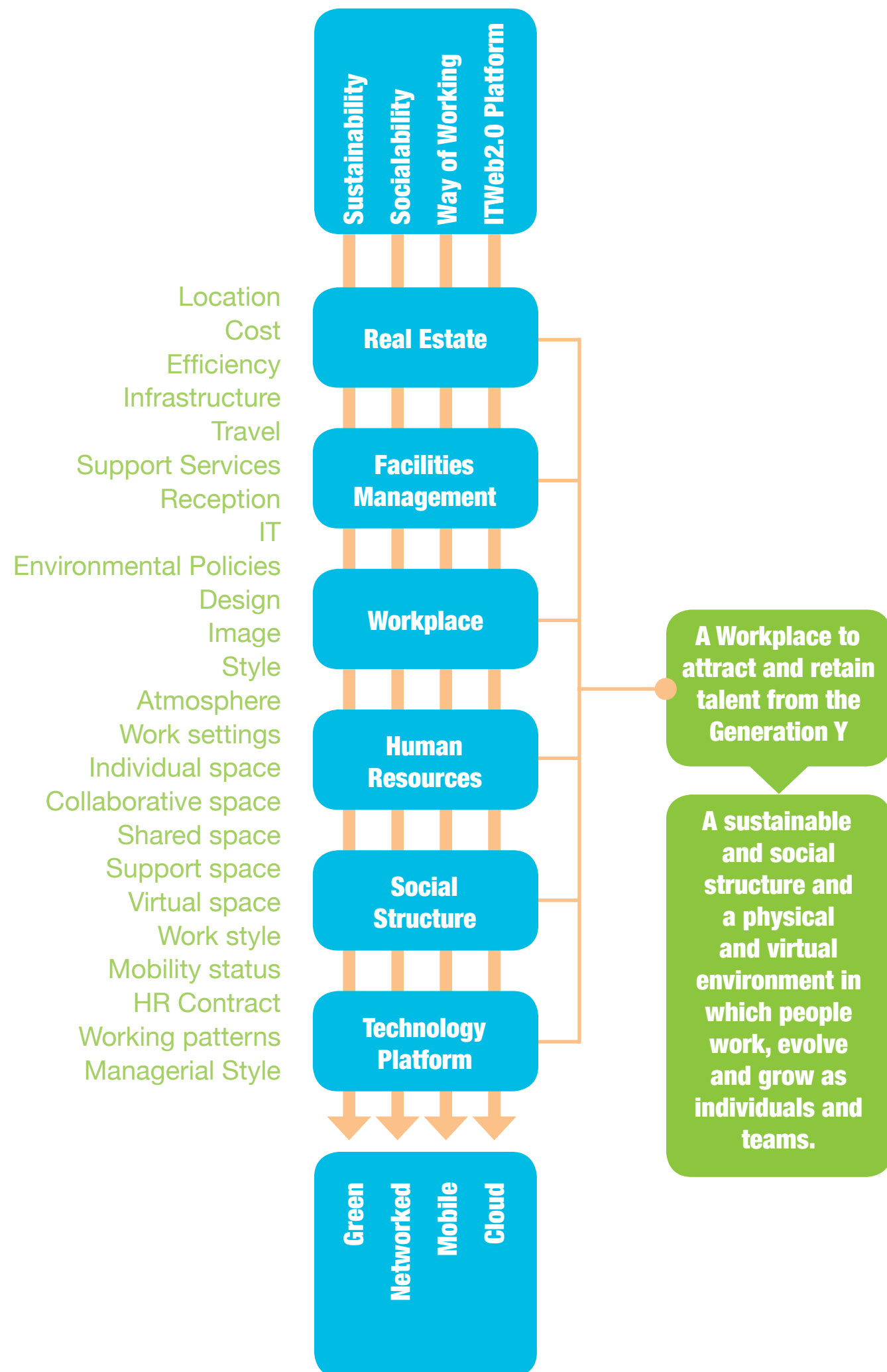


Figure 8: Choice of desk space while at work, 18-25 years old, per country

The issue of space is definitely important to this generation in Germany. As collaboration is getting more and more crucial, we asked our respondents what type of collaborative spaces they would like to have access to while at work. 37% prefer access to formal meeting spaces (the highest amongst the 18 to 25 years old country groups we studied worldwide) while 31% prefer to access a team space (the lowest amongst the studied countries) and 31% prefer to access breakout spaces. Having no meeting space is actually not acceptable: none of the respondents in Germany have chosen 'no meeting rooms'.

The preferences of the Generation Y in Germany for on-site services show some striking results: they are the lowest demanding workforce amongst the country we studied. Only 56% prefer a high level of service (from 5* to 7*) on site equivalent to a Concierge service on site. Access to a broad range of catering facilities is also desired, but they privilege Canteen facilities, Kitchen on site or Coffee Shops/Cafés, rather than restaurant facilities and snack bars. 22% would prefer access to a Gym on site or close by, 36% to communal spaces on site and 30% to a collection of commercial facilities (hairdresser, shops, bank...). 10% have expressed a preference for venues in the workplace (clubs/ venues / halls).. 10% have expressed a preference for venues in the workplace (nightclubs/concert halls).

More than ever before the Generation Y in Germany is shouting out (96%) to their employers that they want them to be green, be sustainable and show it well above the standard environmental compliance: 47% want their employer to go far beyond legal compliance and environmentally friendly rather than aware.



Conclusion

We are looking at a generation which is concerned about the way they work:

- **Why they choose an employer** – Compensation comes first before learning opportunities
- **Where they want to work** – City location
- **How they want to travel to work** – After Car comes Cycling
- **What environment they aspire to work in** – not classical and pale, but more vibrant and light
- **What pattern of work they prefer** - Mobile and Flexible
- **How they want to collaborate** – formally in meeting rooms and as a team in dedicated team spaces
- **How they want their employer to behave** – very environmentally responsible and demonstrating it in the workplace

	TOTAL 18 – 25	Germany 18 – 25
Generation Y total	3509 (52.2% of the total sample)	841 (24.0% of the total sample)
Males	1539 (43.9% of the 18 – 25 sample)	324 (38.5% of the German 18 – 25 sample)
Females	1970 (56.1% of the 18 – 25 sample)	517 (61.5% of the German 18 – 25 sample)
Studying	2640 (75.2% of the 18 – 25 sample)	608 (72.3% of the German 18 – 25 sample)
Location	74% (34% urban + 40% slightly urban) would prefer to work in an urban setting	70% (29% urban + 41% slightly urban) would prefer to work in an urban setting
Natural Light	39% would prefer only natural light in their working environment	42% would prefer only natural light in their working environment
Workplace	A modern or contemporary style with subtle, clinical and relaxing colours	A modern or contemporary style with subtle, clinical and relaxing colours
Travel	40% by car of which 41% would prefer to drive a hybrid car 14% cycling 10% by motorcycle or scooter 19% by public transport 17% walking	31% by car of which 30% would prefer to drive a hybrid car 26% cycling 4% by motorcycle or scooter 23% by public transport 16% walking
Environment	54% would prefer to have an employer which provides a workplace which goes beyond environmentally compliance	47% would prefer to have an employer which provides a workplace which goes beyond environmentally compliance
Top 3 priorities when choosing an employer	1.Work Colleagues 2.Opportunities for learning 3.Quality of life	1.Compensation 2.Work Colleagues 3.Meaningful work



Further Information



Johnson Controls Global WorkPlace Solutions is the leading global facilities management solutions provider. With over 50 years experience in the facilities management business, Johnson Controls has the expertise to deliver comprehensive Workplace strategies that support your global facility portfolio. Our approach to facilities management outsourcing is unique. We work with clients to understand their business needs and then we create tailored solutions designed to meet those needs. We are accountable for implementing our solutions and then for guaranteeing the outcomes promised by our recommendations. What we deliver are comprehensive solutions that are good for our customers' organisations.

Global WorkPlace Innovation (GWi) is the research and development programme of Global WorkPlace Solutions and aims to drive innovation and thought leadership in workplace solutions, globally; support customers' needs and deliver advanced solutions. GWi also aims to challenge the status quo, leading change and delivering added value through innovation excellence.

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For information about Johnson Controls Global WorkPlace Innovation research and development programme, please go to:
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