



Talent trends 2020

Upskilling: Building confidence in an uncertain world

Findings from PwC's 23rd Annual Global CEO Survey



Foreword

As we write, in mid-April 2020, COVID-19 is the main concern for people and businesses around the globe. Business leaders have activated their contingency plans to keep people safe and healthy — and to keep their businesses running. What remains a universal truth is that people must always be at the centre of corporate strategies both when economies are strong and when they are under threat. What's also true is that the keys to unlocking an organisation's value lie in the organisation's culture, in building and maintaining trust, and in harnessing the right skills.

PwC's 23rd Annual Global CEO Survey was conducted before the outbreak of COVID-19. The results of the questions we asked about how companies are preparing their workforce for the digital future and their concerns about attracting and

retaining talent reflect a world that at that time was preoccupied with a skills shortage. We asked about what companies were doing to fill the skills gap and what were the benefits of the upskilling programmes they were starting.

As businesses work to address the current world health crisis and its economic impacts, the insights in this report about the benefits of upskilling your workforce for the digital future are relevant and important, not least because they reinforce the fact that a people-centric approach builds the trust that leadership needs when faced with disruption: companies that invest in their people develop stronger cultures and are more confident of their future success.



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Joint Global Leader,
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Upskilling: Building confidence in an uncertain world

Developing a workforce with the digital and transferable skills you need – and the ability to adapt quickly in a world of constant change – does not happen organically or by accident.

PwC's 23rd Annual Global CEO Survey shows that those organisations focussed on expanding their employees' skills and therefore further along on the upskilling curve were ahead of their peers in many ways and were more confident in their future.

A well-designed programme to deliver a workforce with the digital skills, resilience and agility is important. "There is an upskilling dividend benefitting companies as they face an uncertain economy," according to Bhushan Sethi, Joint Global Leader of PwC's People and Organisation practice. "If words are followed up by real actions, it demonstrates leadership's commitment to its people. Retaining the right talented people and enhancing their skills can help them survive today's challenges and drives competitive advantage in the future."

Upskilling

an organisation's clear intent to develop its employees' capabilities and employability, and to advance and progress the knowledge, skills and attitude required to enhance business and individual performance



Key findings



Skills remain hard to get

74%

of CEOs were concerned about the availability of key skills (vs 79% in the previous year's survey). Of those, 32% were "extremely concerned."

Progress on upskilling can breed confidence

38%

of CEOs who are the most advanced in delivering their upskilling programmes were very confident about growth over the next 12 months. Only 20% of those who are just starting their upskilling journey agreed.

Upskilling delivers more than skills

41%

said that their upskilling programme has been "very effective" in creating a stronger corporate culture and engaging employees.

More talk than action

18%

of CEOs said they have made "significant progress" in "establishing an upskilling programme that develops a mix of soft, technical and digital skills."

Skills remain hard to get



A full 74% of CEOs taking part in our [23rd Annual Global CEO Survey](#) said that a lack of availability of the right skills is a concern.¹ When we ran the survey, from September to October 2019, their worry was around how that would constrain growth. Today that same lack of people with the right skills and adaptability could hamper companies' ability to tackle the impacts of the COVID-19 pandemic.

A year ago, 46% of global CEOs told us that retraining and upskilling were their best options for closing the skills gap in their organisation. But this year, globally, only 18% of CEOs said they had made "significant progress" in "establishing an upskilling programme that develops a mix of soft, technical and digital skills," though a further 36% said they had made "some progress." Surprisingly, one in ten of the largest companies in the survey said they had made no progress at all (the figure for the smallest companies is only slightly higher, at 14%). CEOs are struggling to put their intentions into practice (see Exhibit 1).

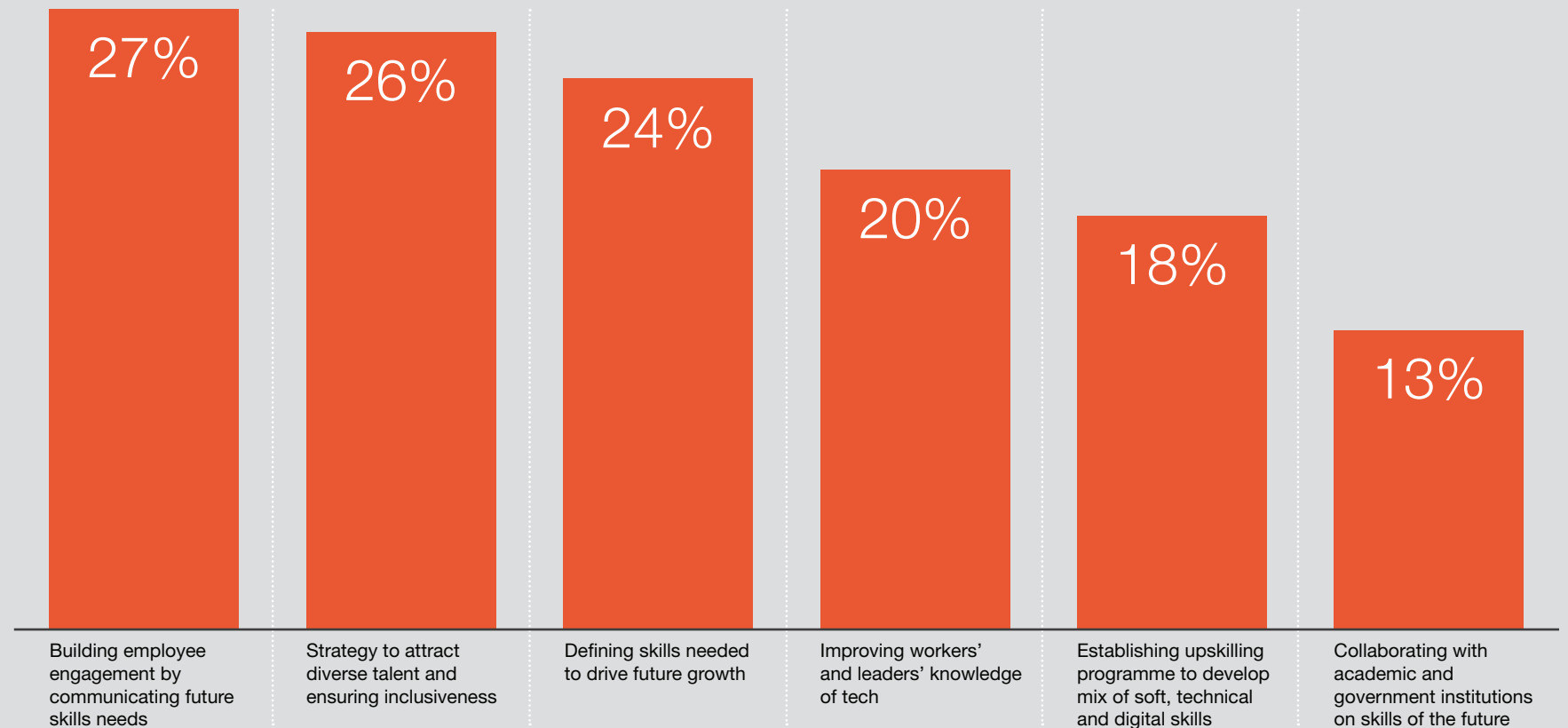
¹ PwC, 23rd Annual Global CEO Survey, Jan. 2020, <https://www.pwc.com/gx/en/ceo-agenda/ceosurvey/2020.html>

Exhibit 1

Companies making significant progress on upskilling see most progress on building employee engagement

Question:

How much progress has your organisation made in the following areas related to upskilling? (showing only those who responded "significant progress")



Source: PwC, 23rd Annual Global CEO Survey
Base: Global respondents (2020=1,581)



This was where things stood before the COVID-19 crisis. Today, businesses still face the challenge of matching skills with gaps. The skills that were hard to find before won't be much easier to find now. Finding people with the right skills *and* the right cultural fit will be even harder.

Organisations that do make the vital investments in their upskilling journey will have a [receptive audience](#).² Employees were already motivated to take action to evolve their skills and remain relevant and employable in the digital workplace: in a [separate survey](#), we asked more than 22,000 people around the world whether they would be willing to upskill in order to become more employable, and 77% said they would.³

77%

of the 22,000 people that we surveyed said they would be willing to upskill in order to become more employable

² PwC, Our status with tech at work: It's complicated, 2018, https://www.pwc.com/us/en/services/consulting/library/images/PwC_CIS-Tech-at-Work.pdf

³ PwC, PwC, Hopes and Fears Survey, 2019, <https://www.pwc.com/gx/en/issues/upskilling.html>

Progress on
upskilling can
breed confidence



When CEOs took the survey in September and October 2019, before the COVID-19 pandemic, there was already a sharp rise in pessimism about growth.⁴ But there was also a clear correlation between progress on upskilling and the level of confidence that CEOs reported.

CEOs of more advanced upskilling organisations were more optimistic about global economic growth — 34% expecting improvement versus 15% of CEOs just beginning their upskilling journey. These CEOs also had more confidence in their own revenue growth, with 38% “very confident” versus 20% of beginners (see Exhibit 2).

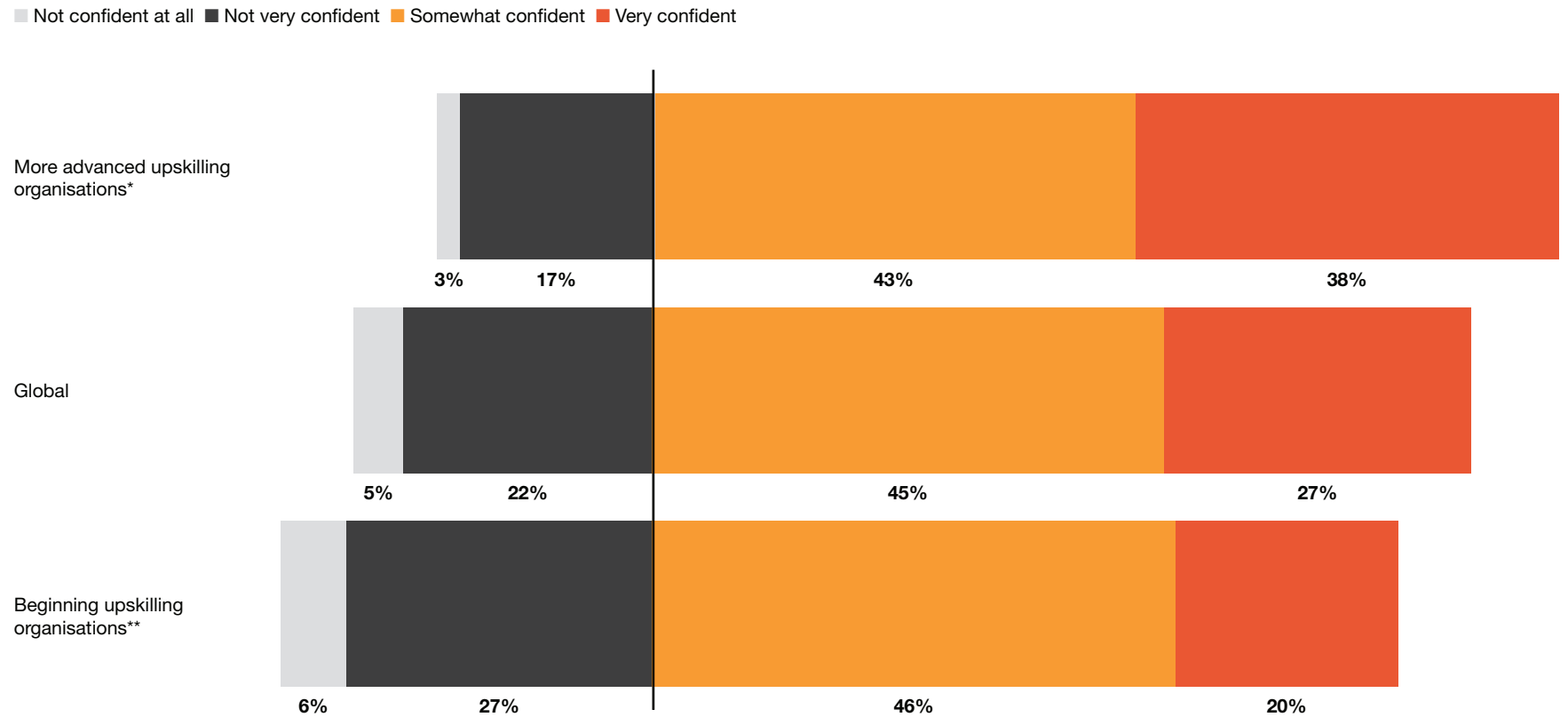
This may suggest that taking steps to upskill helps organisations build confidence because it shows a clear, practical course of action in an increasingly uncertain world. Additionally, employers who make good-faith efforts to upskill their employees build trust — and that in turn can enhance the organisation’s reputation in a world where trust is an increasingly valuable commodity.

Exhibit 2

Upskilling can breed confidence

Question:

How confident are you about your organisation’s prospects for revenue growth over the next 12 months?



Source: PwC, 23rd Annual Global CEO Survey

* “More advanced upskilling organisations” refers to the top quartile of CEOs regionally who have reported the most progress in upskilling

** “Beginning upskilling organisations” refers to the bottom quartile of CEOs regionally who have reported the least progress in upskilling

Note: Not all figures add up to 100% as a result of rounding percentages and excluding “neither/nor” and “don’t know” responses

Note: Upskilling relates to an organisation’s clear intent to develop its employees’ capabilities and employability, and to advance and progress their technical, soft and digital skills

Base: Global, “beginning” and “more advanced” upskilling organisations (Global=1,581; beginning organisations=411; more advanced organisations=353)

⁴ PwC, 23rd Annual Global CEO Survey, Jan. 2020, <https://www.pwc.com/gx/en/ceo-agenda/ceosurvey/2020.html>

Upskilling delivers more than skills



We can draw two main lessons from the survey results: first, that the full benefits of upskilling programmes take time to emerge; and second, that the benefits (at earlier stages, at least) are complementary to filling the skills gap.

It's the positive organisational impact that emerges first. Twice as many CEOs (41%) said that their programme has been "very effective" in creating a stronger corporate culture and improving employee engagement, than have benefitted from reducing the skills gap; and that rises to 60% for CEOs who had invested more significantly in their upskilling programme. Only one in five CEOs said their own upskilling programme has been "very effective" in addressing the skills gap so far, but among companies with more advanced programmes, that share rises to 35% (see Exhibit 3).

20%

of CEOs said their upskilling programme is reducing skills gaps and mismatches.

Exhibit 3

Upskilling programmes deliver more than skills. Those that are most advanced have even greater gains

Question:

How effective are your upskilling programmes in achieving the following outcomes? (Showing only "very effective.")



Source: PwC, 23rd Annual Global CEO Survey

* "Beginning upskilling organisations" refers to the bottom quartile of CEOs regionally who have reported the least progress in upskilling

** "More advanced upskilling organisations" refers to the top quartile of CEOs regionally who have reported the most progress in upskilling

Note: Upskilling relates to an organisation's clear intent to develop its employees' capabilities and employability, and to advance and progress their technical, soft and digital skills

Base: Global, "beginning" and "more advanced" upskilling organisations (Global=1,581; beginning organisations=411; more advanced organisations=353)



When we analyse these results according to the maturity of upskilling programmes, it becomes clear that the benefits improve over time. Organisations that had made the most progress on upskilling reported stronger returns across the board than those at the beginning of the journey.

CEOs also reported a range of benefits beyond developing skills: 30% said it had been very effective in improving productivity, 30% said it had accelerated digital transformation, and 28% said it helped improve talent acquisition and

retention. Once again, companies that are more advanced report higher gains; those that continue with upskilling will likely see more.

As organisations emerge from the COVID-19 crisis and its economic impacts, the benefits seen from well-constructed and well-implemented upskilling programmes will be an important tool in building confidence, agility and competitive advantage.

41%

said that their programme has been “very effective” in creating a stronger corporate culture and improving employee engagement.

More talk than action

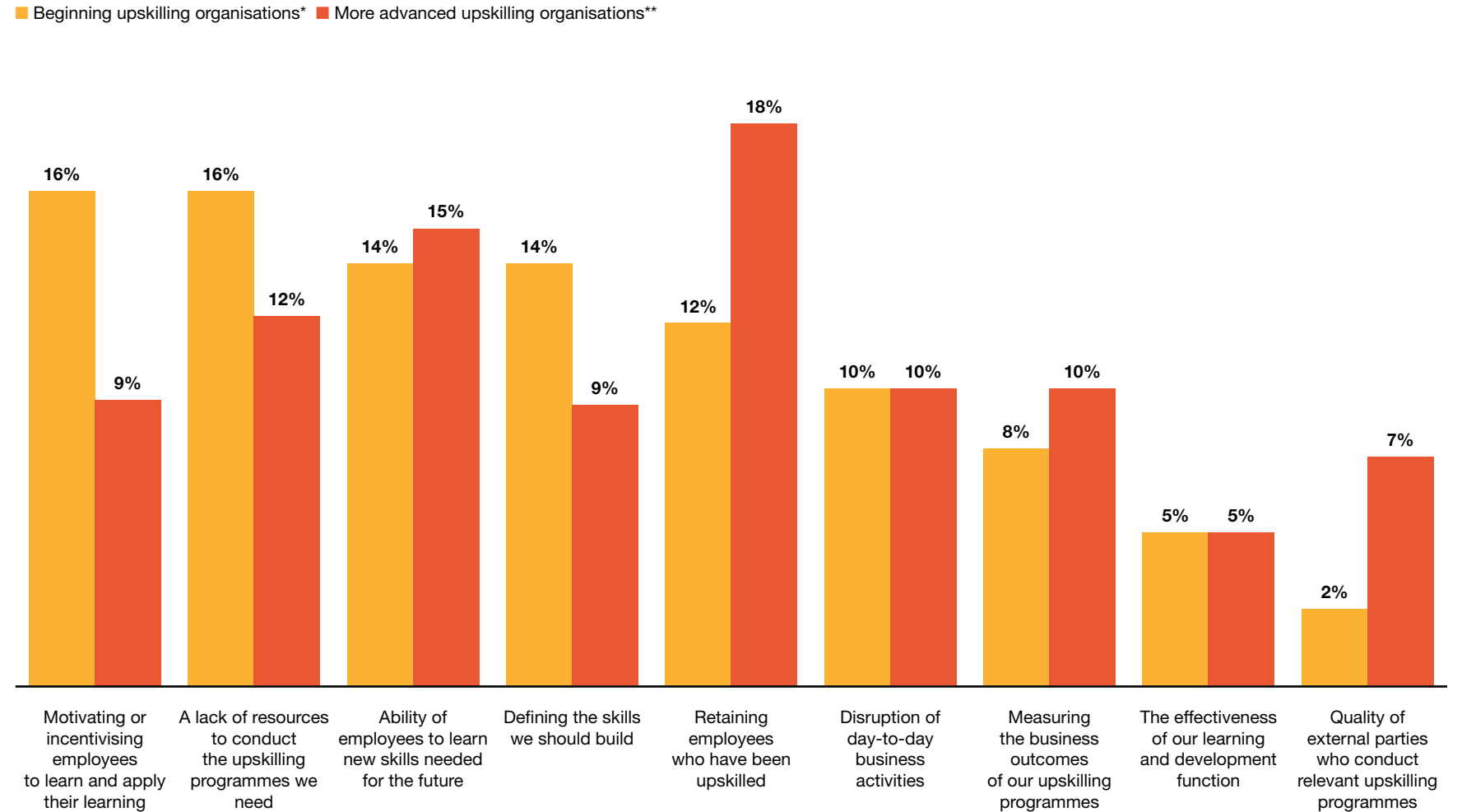


Exhibit 4

The more investment in upskilling, the higher the fear about talent retention

Question:

Please rank the three greatest challenges your organisation currently faces in its upskilling efforts. (showing percentage ranked first)



Source: PwC, 23rd Annual Global CEO Survey

1 "Beginning upskilling organisations" refers to the bottom quartile of CEOs regionally who have reported the least progress in upskilling

2 "More advanced upskilling organisations" refers to the top quartile of CEOs regionally who have reported the most progress in upskilling

Note: Upskilling relates to an organisation's clear intent to develop its employees' capabilities and employability, and to advance and progress their technical, soft and digital skills

Base: "Beginning" and "more advanced" upskilling organisations (beginning=411; more advanced=353)



In the previous CEO Survey, launched in January 2019, close to half of the respondents said they favoured upskilling their own workforce to fill the skills gap. But 12 months later, only 18% said they had made significant progress. When we asked CEOs to rank what they saw as their most pressing challenge in delivering an upskilling programme, the range of responses from different industries might help explain what is holding them back.

We can divide these into the following four themes.

1. Holding on to upskilled talent

There was palpable concern among CEOs in this year's survey that they could invest a substantial amount in upskilling only to see valuable employees leave. Overall, 14% of CEOs said this was their biggest challenge, but it was the number one challenge for 19% of CEOs in the sectors of tech, media and telecoms; industrial manufacturing; and automotive.

An organisation's stated purpose must be more than lip service; a strong commitment to its workforce and to upskilling — particularly now — can reinforce this.

Keeping hold of workers with key skills and helping them build, apply and leverage those skills to help businesses remain afloat will be key — but it is only one element of the employee experience. The truth is that if CEOs are worried that their staff will be in demand from competitors, that's a sure indication that their upskilling programme is a success.

What may be missing is a plan to make the best use of employees who have been upskilled so they can see the value of their new learning and are incentivised to put it to good use helping their own organisation weather the economic impact of COVID-19.

2. What skills to teach

Defining exactly which skills an organisation will need in the future was already proving to be a significant challenge for CEOs in those sectors predicted to be most disrupted by digital technology, including financial services and healthcare, where 16% named it as their biggest challenge (compared with 12% of all respondents). Given the changes forced on businesses by COVID-19, CEOs are seeing in real time both the challenges and possibilities of moving to more digital and virtual models.

The skills organisations need today — creativity, problem solving, an understanding of how digital technology can be used — and in the future are a moving target. Planning for the short term used to be relatively easy, but the rapidly evolving landscape makes predictions more precarious.

As Carol Stubbings, Joint Global Leader of PwC's People and Organisation practice, puts it, it's about creating a culture of adaptability: people need to learn how to think, act and thrive in a digital world that is much less predictable than we once thought. "Companies need to invest in their people. That's how many companies will survive this crisis and become stronger. It's about people, not about jobs — because jobs will change or have already changed as organisations adapt to the situation we're in and focus, in an agile way, on business outcomes," says Stubbings.

Organisations need to build transferable, 'no regrets' skills that prepare people no matter the change.⁵ They used to be called soft skills, though in today's world they can have a harder edge when they're combined with digital skills, like the ability to create bots from off-the-shelf software that can perform repetitive, time-consuming tasks.

“ Companies need to invest in their people. That's how many companies will survive this crisis and become stronger.

Carol Stubbings

Joint Global Leader of PwC's People and Organisation practice



⁵ Bhushan Sethi and Carol Stubbings, "Good work," *strategy+business*, Feb. 18, <https://www.strategy-business.com/feature/Good-Work>

For some organisations, surviving the impact of COVID-19 will require redeploying workers to critical roles. Rapidly reskilling and supporting workers to take on different roles — ones which they've never been trained for in many instances — will be the difference between success and failure.

Organisations and their leaders can't afford to wait for a clarity that may never be fully realised about what the jobs of the future will look like. The greater confidence levels seen in organisations with more mature upskilling programmes in place, combined with their CEOs' belief that upskilling has increased productivity and generated growth, is a clear sign that upskilling can help create a competitive advantage. This is the very thing that organisations will need as we start to emerge from the impacts of COVID-19.

3. Motivation and inspiration

Upskilling and culture are closely intertwined in a symbiotic relationship. Upskilling contributes to a better employee experience, and that brings real benefits — a [2017 MIT study](#) showed that companies that provide a great employee experience are 25% more profitable than those that don't.⁶

But the message has to come from the top. A clear narrative from senior leaders about the organisation's plans helps to address the fear of the future, which can be a major drain on productivity and engagement.

We know most people are willing and ready to learn new skills — in fact, they're ready to entirely retrain — in order to improve their future employability, but our research shows that [only one in three](#) feel that they have been given the opportunity by their employer to develop the digital and transferable skills they need.⁷



Bosses also have to invest in their own upskilling. If leaders commit to upskill themselves, it will give them a better understanding of the benefits — along with the time, energy and commitment it takes. All of which will be under pressure as organisations grapple with the effects of COVID-19.

⁶ Kristine Dery and Ina Sebastian, "Building Business Value with Employee Experience," MIT Center for Information Systems Research, June 15, 2017, https://cisr.mit.edu/publication/2017_0601_EmployeeExperience_DerySebastian

⁷ PwC, Hopes and Fears Survey, 2019, <https://www.pwc.com/gx/en/issues/upskilling.html>



4. Paying for it

Having sufficient financial resources to deliver effective upskilling programmes is a concern, not least at a time of economic crisis. Even before COVID-19, CEOs in government and public services cited this as their biggest challenge — not surprising, in an era of public-sector belt-tightening.

But it was also true of industrial manufacturing leaders, which might explain why manufacturing CEOs had made less progress in their upskilling journey than CEOs in other sectors, and in turn were seeing less-effective outcomes. Manufacturing jobs were already most likely to be at risk from automation, but what's also true is that having people with [the right skills working alongside new technology](#) will become all the more critical for organisations to remain competitive.⁸

There are varying estimates of what it costs to upskill staff. The World Economic Forum has estimated that in the US, the cost of upskilling is about US\$24,000 per employee.⁹ There is no simple calculation. But the fact remains, upskilling should still be seen as a strategic priority alongside technology investments because the two go hand in hand: the innovation and productivity expected from the latter will only happen if the right skilled and motivated workforce is in place to exploit the technology.

Yet much of what organisations have been spending to train their employees has not been working, according [to research](#): the need to make any investment effective is now even more pressing.¹⁰

⁸ PwC, "Pulse on robotics," CEO Pulse, <https://www.pwc.com/gx/en/ceo-agenda/pulse/robotics.html>

⁹ Briony Harris, "Who should pay for the workers to be reskilled," World Economic Forum, Jan. 22, 2019, <https://www.weforum.org/agenda/2019/01/who-should-pay-for-workers-to-be-reskilled-1>

¹⁰ Carol Stubbings, Darren Homer, and John Francis, "Thawing the frozen middle," *strategy+business*, Nov. 29, 2019, <https://www.strategy-business.com/article/Thawing-the-frozen-middle>

Recommendations



Set a clear direction and lead from the front

Leaders need a strong and credible narrative that explains their strategy and future vision — including the objectives for investing in their upskilling programmes. And they need to be seen to be part of the upskilling journey themselves: walking the talk.



Staying the course is easy in a growing economy, but when faced with an economic downturn and squeezed profits, cutting all upskilling investment may send the wrong message and harm future competitiveness.

Identify your priority skills and skills gaps

This may be one of the hardest exercises because as we've seen from the CEO Survey results, leaders are struggling to know what skills they need now and in the future. At PwC, we have [a five-step plan](#) for upskilling that starts with analysing the transferable skills that work today and in the future.¹¹ We analyse the changing business environment to identify the scope for digital working and automation in current roles. We look at the future workforce needs and the current workforce capabilities, and we seek to clarify the cultural and behavioural challenges. This helps organisations determine their most pressing skills gaps and mismatches, the populations of employees whose roles will become redundant and the key challenges to upskill their organisation. It's an important move in building the case for change.



11 PwC, "Upskill my workforce for the digital world," <https://www.pwc.com/gx/en/services/people-organisation/upskill-my-workforce-for-the-digital-world.html>

Upskilling and reskilling are both vitally important



Businesses will need their people to have the right skills to be able to fully contribute to their companies' success. In the long term, upskilling will raise employees' productivity as digital transformations progress and more people find themselves working alongside machines — both in factories and in the services industries — as automation takes over repetitive tasks. In the short term, reskilling will be necessary to allow people to operate in the new roles that are created by the COVID-19 crisis. For example, in financial services there's a reduced need for the people-facing role of cashier, but people who perform that task can be trained to offer remote customer service.

Build on your cultural foundations



Employees will only learn new skills if your culture and your upskilling programmes are aligned. Our 'New world. New skills.' initiative has an employee-led component, because in our experience allowing people to identify the skills they need to be more productive and successful and giving them the space to learn are by far the most effective approaches.

At PwC, an important element of our culture is rapidly forming multi-disciplinary teams and building innovative solutions for our clients in bursts of problem solving, creativity and innovation. Our digital upskilling programme builds on this cultural trait and uses it to power up our people's learning by letting them 'opt in' to build new skills and improve existing ones, and apply what they've learned directly to real-life problems. Incentives to participate and gamification principles have been embedded [in the programme](#): this approach closely matches the culture of our firm and explains the enthusiastic take-up by staff.¹²



¹² PwC, "Upskilling 2.0: business-powered; people-powered; results-driven," <https://www.pwc.com/us/en/about-us/workforce-strategy.html>



Provide time, energy and motivation to learn



Providing for well-being creates trust and supports the hard work of learning. This is vitally important now as so many people are working from home, isolated from their usual daily routines. When restrictions on movement are lifted and people start returning to workplaces, it will be imperative that leaders and managers understand that employees need the space to decelerate, reflect and learn from peers.

Businesses need to create a compelling people experience to enhance learning in a world where technology and changing expectations are redefining what working means for everyone. That will require refocussing learning to become something intrinsic to the day job, not on top of it.

In our own business, it was important to deliver on programmes to support well-being and work-life balance before we rolled out our digital upskilling programmes. We knew it would be vital for our people to know we were supporting them through the journey. Engaged workers embrace upskilling and **deliver higher levels of productivity**.¹³

Track and measure results



Upskilling takes considerable time and money and is potentially disruptive to day-to-day business (almost one in ten CEOs said this was the top concern for them). That's why ensuring return on investment (ROI) is critical. Buy-in from the leadership and engagement within the workforce will quickly fall away if there is no clear evidence of benefits.

Success can be measured in terms of financial results, customer satisfaction, employee retention and talent attraction. It can also be measured for its societal impact: your company will be seen as playing its part in preparing people to thrive in the future.

Time to take action

Talent is a perennial issue for CEOs, particularly when the economy is growing. This year, before COVID-19 spread, three-quarters of CEOs said they were concerned about whether they would have the talent they needed. The competition for talent is unlikely to abate and it is vital for leaders to focus on developing skills. At the moment there are immediate issues that need to be addressed: workforce safety and well-being must be the top priority for businesses, along with managing costs. In many industries, people may need to be reskilled and redeployed and some will face the anxiety of being furloughed or being made redundant. These are challenging times for CEOs and their people.

Those companies that have started the digital-upskilling journey will find themselves in a better position to benefit from growth when the economic climate improves because they will have a workforce that is ready. CEOs who have already taken action to upskill their people are seeing the advantages. That sends a pretty clear message to those still on the fence.



“ First, you have to create a culture of learning. Investing in people and helping them continually develop their skills, that should be embedded in a company’s culture. That doesn’t just mean training people in what the company decides is important to them. At least a portion of the learning agenda should be based on what the individual chooses to learn about. The role of the company is to continually challenge and develop its people, starting at the top. In fact, I think the company has an obligation to do so.

Jim Keane
CEO of Steelcase, US

About PwC's 23rd Annual Global CEO Survey

PwC surveyed 3,501 CEOs in 83 territories in September and October 2019. The sample of 1,581 CEOs used for the global and regional figures in this report are weighted by national GDP to ensure that CEOs' views are fairly represented across all major regions. Further details by region and industry are available on request. Seven percent of the interviews were conducted by telephone, 88% online, and 5% by post or face-to-face. All quantitative interviews were conducted on a confidential basis.

Of the 1,581 CEOs whose responses were used for the global and regional figures:

- 46% of their organisations had revenues of US\$1bn or more
- 35% of their organisations had revenues between US\$100m and US\$1bn
- 15% of their organisations had revenues of up to US\$100m
- 55% of their organisations were privately owned.

Notes:

- Not all figures add up to 100% as a result of rounding percentages and excluding 'neither/nor' and 'don't know' responses from exhibits.
- The base for global figures is 1,581 (global respondents) unless otherwise stated.

We also conducted in-depth, face-to-face interviews with CEOs from six regions. Some of these interviews are quoted in this report, and more extensive transcripts can be found on our website at <https://www.strategy-business.com/inside-the-mind-of-the-ceo>.

The research was undertaken by PwC Research, our global centre of excellence for primary research and evidence-based consulting services.

<https://www.pwc.co.uk/pwcresearch>



PwC's 'New world. New skills.' programme

'New world. New skills.' is PwC's global programme to help millions of people around the world improve their understanding, skills and knowledge for the digital world.

Business has an important role to play in ensuring no one gets left behind unwillingly. There's an urgent need for organisations, governments, educators and citizens to come together to address this growing problem.

We'll be convening discussions and working with a broad group of stakeholders to help find solutions that work in each country. We're helping organisations in the public and private sectors to anticipate the skills they will need in the future, and work together on comprehensive solutions.

Over the next four years, we will be training our people in technologies for supporting clients, communities and other stakeholders across our territories. We also will be directing more of our community initiatives to focus on upskilling.

Find out more at www.pwc.com/upskilling.

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