

Becoming Digital:

2019 Pathways to Digital Enablement Survey

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15th October 2019



What we explored...

Fielded February – April, 2019



How to build new digital capabilities.



What new roles, skills, processes and structures are needed.



How to attract, retain and reward pivotal talent.



How “being digital” can help you remain competitive.



New ways of working, new behaviours and changing expectations of leaders.

1,000+
organisations

40+
industries

40+
countries

What we discovered...

Driving forces shaping the new work ecosystem

1

Organisations striving to be digital

3 out of 4 organisations are working to develop new digital capabilities



2

Automation is everywhere

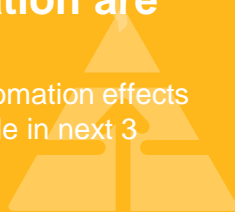
Within 3 years over 90% of organisations will be using automation to get work done



3

Effects of automation are accelerating

Organisations who say automation effects job design will almost double in next 3 years



4

Increasing talent sourcing options

Non-employee talent as a share of total workforce expected to grow by 30% over next 3 years



5

Talent fears over jobs are high

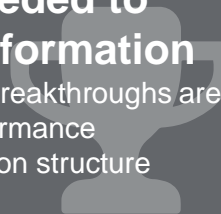
2 out of 5 fear their job taken over by robots: but they're ready for reskilling



6

Breakthroughs needed to guide digital transformation

60% of organisations think breakthroughs are required in leadership, performance management and organisation structure



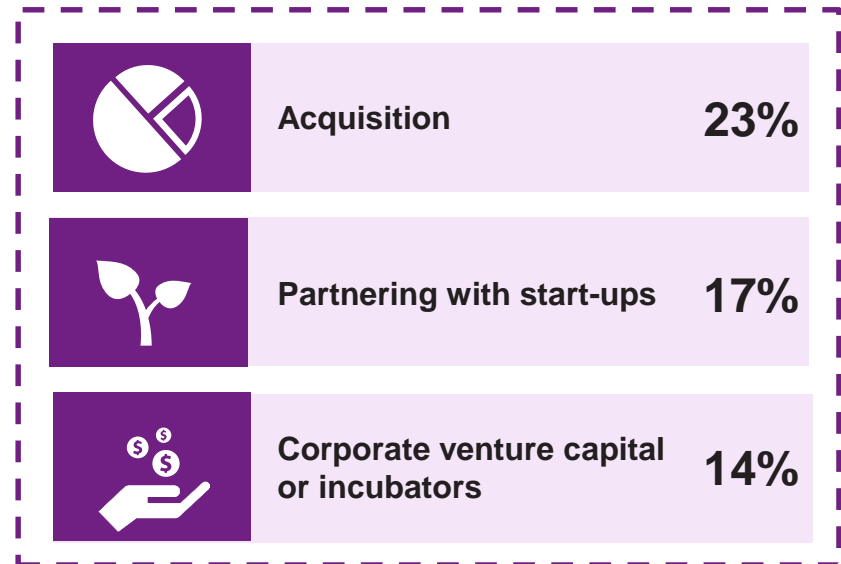
Organisations take different paths to becoming digital

Build, buy, borrow..?

Methods of getting started



Advanced methods



Organisation use each of the following to develop new digital capabilities (4 / 5 - To a great extent)

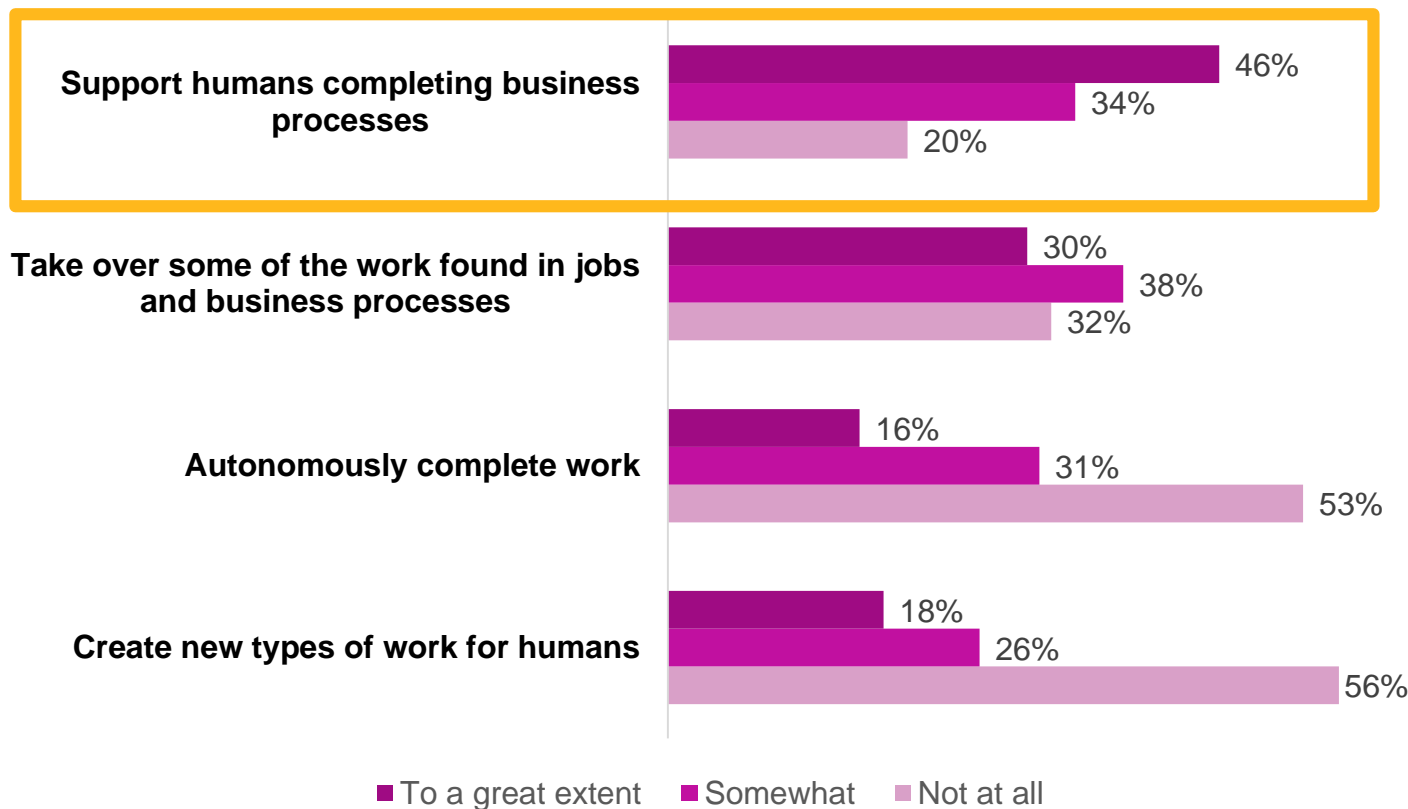
Number rounded slightly

Source: 2019 Willis Towers Watson Pathways to Digital Enablement Survey

Automation is everywhere

Are robots replacing people at work?

To what extent are automation and digitalisation currently being used at your organisation to do the following?

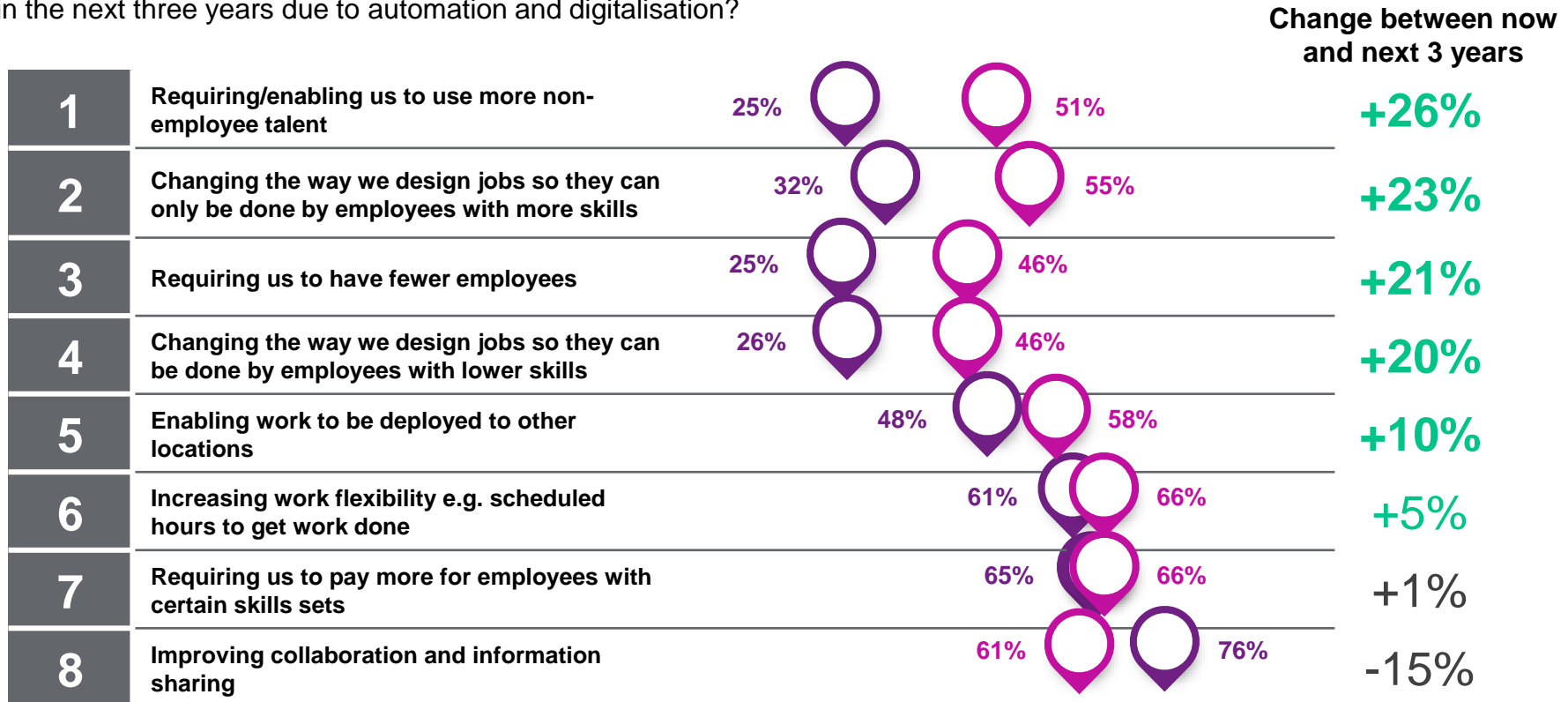


Source: 2019 Willis Towers Watson, Pathways to Digital Enablement Survey

And it is on the increase

Which aspects of HR are going to be impacted the most?

Which of the following areas of your workforce and work activities are changing today or will change in the next three years due to automation and digitalisation?



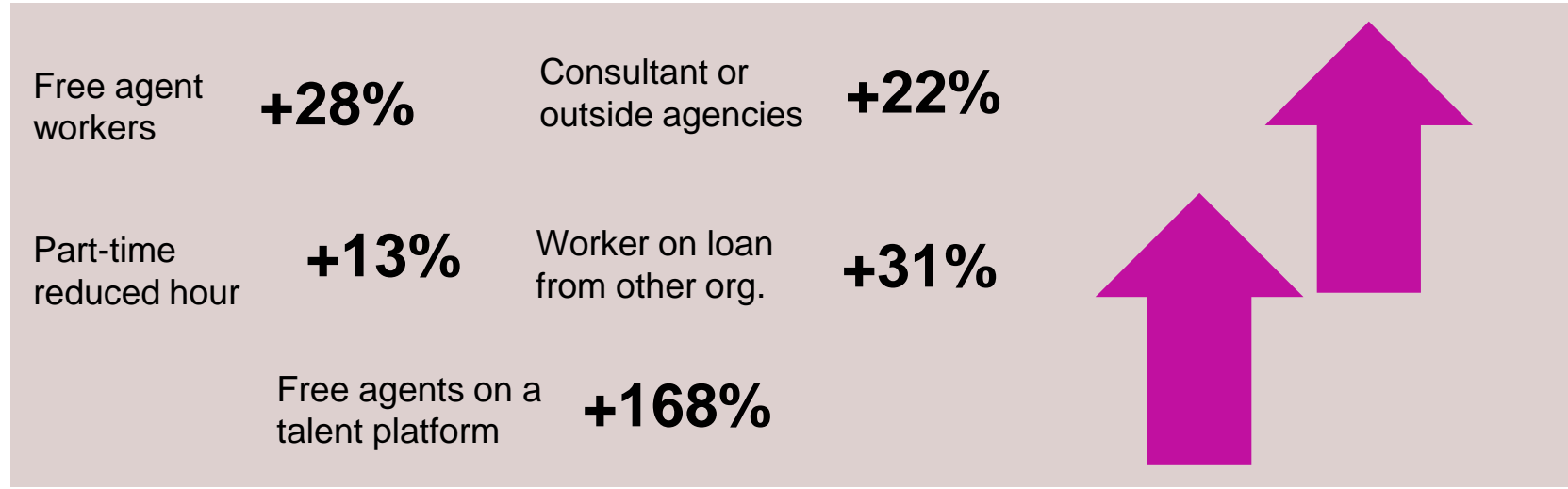
(% of "To a great extent" or "To a very great extent")

Source: 2019 Willis Towers Watson, Pathways to Digital Enablement Survey

○ Today ○ In the next three years

The proportion of non-employee talent is growing rapidly

What does that mean for our employees?



Full time employees' share of the total workforce **expected to drop 4 percentage points** over the next three years

Source: 2019 Willis Towers Watson, Pathways to Digital Enablement Survey

Employees who feel their job is less secure include those who are ready to compete in the changing market and those who fear being left behind.

Plan to leave

41% of them are considering leaving within the next two years

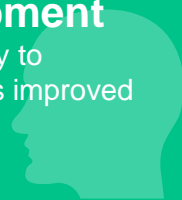


Continue to care about job security Job security is the #2 driver of attraction for them, behind only base pay.



Personal development

Half believe that their ability to advance in their career has improved over the past 12 months



More mindful of the difficulties ahead

More likely to say the work they do could become outdated



Financial worries

They are 1.5x as likely to worry about their current financial state

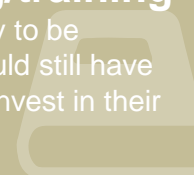


Happy with current pay

They are about 2x as likely to think their base pay and bonus are above average.

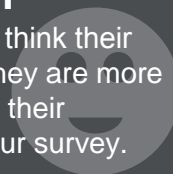
Invest in learning/training

Even if they are more likely to be financial worriers, they would still have the financial resources to invest in their own skills development



Higher satisfaction

Compare to those who don't think their job is likely to be replaced, they are more likely to give higher marks to their employer in many areas of our survey.

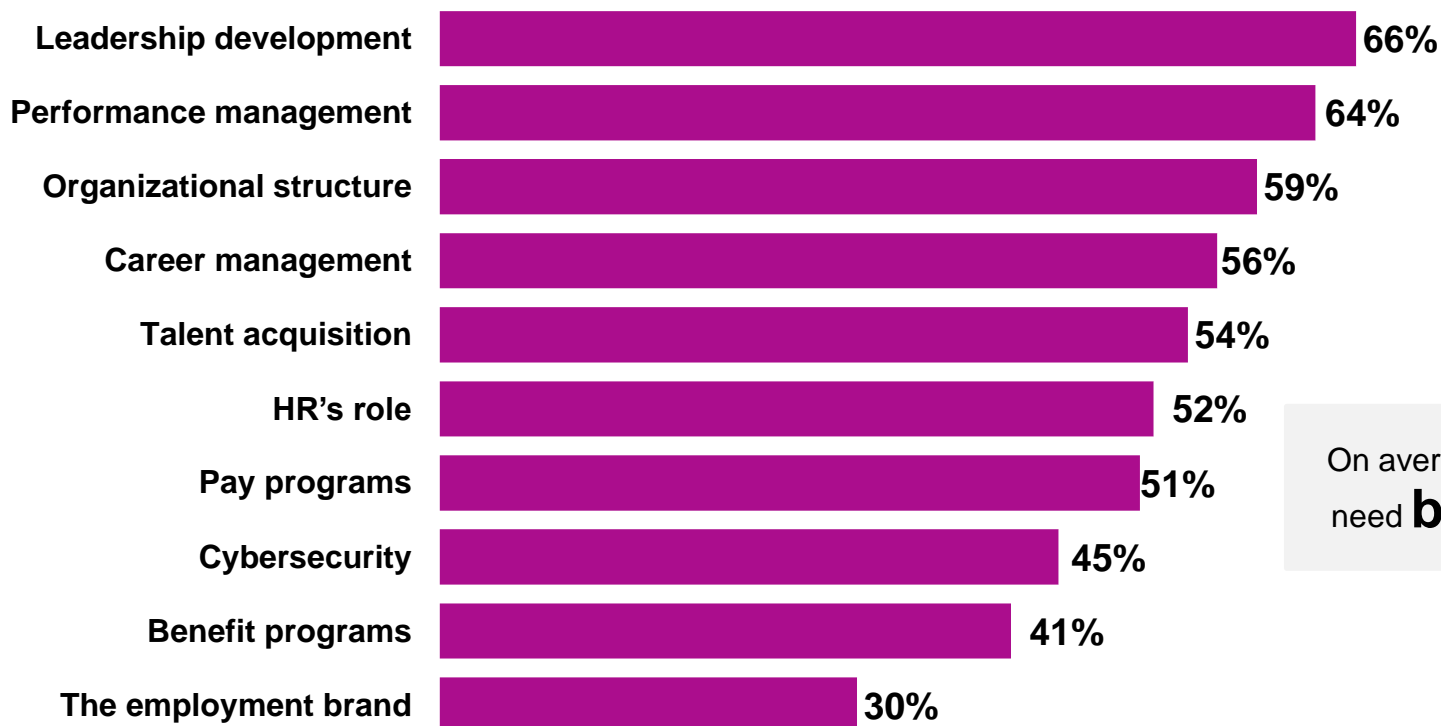


Source: 2019 Willis Towers Watson Talent Survey

To unlock value, breakthrough approaches are needed

How well prepared is HR to lead the transformation required?

In your opinion, which of the following areas will require "breakthrough" approaches and innovation to ensure the challenges of automation and digitalisation are adequately addressed in the future?



On average, **5.2** areas need **breakthroughs**

Source: 2019 Willis Towers Watson, Pathways to Digital Enablement Survey

HR holds the key...



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