Digital Skills - India

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Methodology

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- This study was conducted online between 3-7 March 2021.

- The sample comprised a national sample 1,056 middle managers and above from businesses with 1 to 100+ employees across a diverse range of industries and includes private, public and NFP organisations.

- YouGov designed the questionnaire, a copy of which has been included in this report.

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Key findings

Key findings

Seven in ten managers surveyed (69%) are very confident that their organisation has the necessary digital skills to succeed (Q1)

- Seven in ten managers surveyed (69%) are very confident that their organisation has the necessary digital skills to succeed while more than a quarter (27%) are somewhat confident, 3% not at all confident and 2% unsure.

- Millennial (73%) and Gen Z (69%) managers are more likely than Gen X managers (58%) to be very confident that their organisation has the necessary digital skills to succeed.

- Managers at a senior level or above (71%) are more likely than middle managers (64%) to be very confident that their organisation has the necessary digital skills to succeed.

- Confidence in digital skills is also higher amongst managers from larger organisations with 77% of those from businesses with 100+ employees and 72% of those with 50+ employees more likely to be very confident their organisation has the necessary digital skills to succeed compared to 61% amongst those from organisations with less than twenty employees.

- Managers in technology services (84%) and manufacturing (76%) are more likely to be very confident that their organisation has the necessary digital skills to succeed.

- Not surprisingly, managers who believe senior management place a high level of importance on addressing the digital skills gap in their organisation (88%) are much more likely than those who believe the level of importance being placed is just moderate (48%) or low (27%) to be very confident that their organisation has the necessary digital skills to succeed.

Key findings

- Similarly, managers who have undertaken digital skills training themselves in the past 12 months (73%) are more likely than those who have not (39%) to be very confident that their organisation has the necessary digital skills to succeed.

- Managers who significantly believe (85%) that Government is doing enough to address the digital skills gap are more likely than those who somewhat believe (57%) and do not believe (44%) to be very confident that their organisation has the necessary digital skills to succeed.

More than half of managers (56%) believe their senior management is placing a high level of importance on addressing the digital skills gap in their organisation (Q2)

- More than half of managers (56%) believe that their senior management is placing a high level of importance on addressing the digital skills gap in their organisation while more than a third (35%) think it is moderate and 5% believe only a low level of importance is given to addressing the digital skills gap in their organisation.

- Managers aged 35-49 (39%) are more likely than those aged 50-64 (26%) to think their senior management is placing only a moderate level of importance on addressing the digital skills gap in their organisation.

- Managers located in North India (37%) are more likely than those in East India (27%) to think their senior management is placing only a moderate level of importance on addressing the digital skills gap in their organisation.

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Key findings (continued…)

- The perception that senior management is placing a high level of importance on addressing the digital skills gap is also more prevalent amongst managers from larger organisations (62% amongst those from organisations with 100+ employees) compared to managers from organisations with 20-49 employees (51%) and those from organisations with less than twenty employees (51%).

- Managers working in technology services (67%) and financial services (66%) were most likely to report senior management placing a high level of importance on addressing the digital skills gap.

- Managers working in the private (62%) and public (52%) sectors are more likely than those working in the NFP/ Charity sector (40%) to report senior management placing a high level of importance on addressing the digital skills gap.

- Managers who significantly believe (73%) that Government is doing enough to address the digital skills gap are more likely than those who somewhat believe (41%) and do not agree (35%) to report senior management placing a high level of importance on addressing the digital skills gap.

Nine in ten (93%) managers believe that the COVID-19 pandemic has accelerated the need for digital skills in their organisation (Q3)

- Nine in ten (93%) managers believe that the COVID-19 pandemic has accelerated the need for digital skills in their organisation, with two thirds (65%) saying it has significantly accelerated the need, while 5% say it has not accelerated the need for digital skills and 2% are unsure.

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Key findings (continued…)

- Female managers (68%) are more likely than their male counterparts (61%) to significantly believe that the COVID-19 pandemic has accelerated the need for digital skills in their organisation

- Millennial managers (71%) are more likely than Gen Z (62%) and Baby Boomer managers (54%) to significantly believe that the COVID-19 pandemic has accelerated the need for digital skills in their organisation.

- Managers from larger organisations with 100+ employees (70%) are more likely than those with less than 20 employees (60%) to significantly believe that the COVID-19 pandemic has accelerated the need for digital skills in their organisation.

- Managers working in Manufacturing (71%), Engineering/design/architecture (70%), Technology services (70%) and Business services (70%) are most likely to significantly believe that the COVID-19 pandemic has accelerated the need for digital skills in their organisation.

- Similarly, managers working in the public (70%) and private sector (68%) are more likely than those working in the NFP/Charity sector (45%) to significantly believe that the COVID-19 pandemic has accelerated the need for digital skills in their organisation.

- Managers who have undertaken digital skills training themselves in the past 12 months (96%) are more likely than those who have not (71%) to believe that the COVID-19 pandemic has accelerated the need for digital skills in their organisation.

- Managers who believe senior management place a high level of importance on addressing the digital skills gap in their organisation (78%) are much more likely than those who believe the level of importance being placed is moderate (54%) or low (35%) to significantly believe that the COVID-19 pandemic has accelerated the need for digital skills in their organisation.

Key findings (continued…)

More than eight in ten (87%) managers surveyed say they have undertaken digital skills training or learning in the past 12 months (Q4)

- More than eight in ten (87%) managers surveyed say they have undertaken digital skills training or learning in the past 12 months. However just four in ten (40%) claim this was a high level of training/learning, while another four in ten (41%) say it was a moderate level and 6% a low level of digital skills training/learning.

- Gen Z (92%) and Millennial managers (90%) are more likely than Gen X (76%) to have undertaken digital skills training or learning in the past 12 months and more likely to say it was a high level of training/learning (44% and 44% compared to 27%).

- Managers in East India (49%) and North India (43%) are more likely than those in West India (34%) to have undertaken high level digital skills training or learning in the past 12 months.

- Managers at a senior level or above (44%) are more likely than middle managers (28%) to have undertaken high level digital skills training or learning in the past 12 months, while middle managers (51%) are more likely than those at a senior level or above (37%) to have undertaken moderate level digital skills training or learning in the past 12 months

- Managers from larger organisations with 100+ employees (92%), 50+ employees (90%) and 20-49 employees (90%) are more likely than those from organisations with less than 20 employees (82%) to have undertaken digital skills training or learning in the past 12 months.

- Managers working in technology services (94%), education (93%), Engineering/design/architecture (92%), financial services (91%) and accounting (91%) are most likely to have undertaken digital skills training or learning in the past 12 months.

Key findings (continued…)

- Similarly, managers working in the public sector (94%) are more likely than those working in the private sector (88%) to have undertaken digital skills training or learning in the past 12 months.

- Interestingly, managers who perceive their senior management to be placing a high level of importance on addressing the digital skills gap in their organisation (93%) are more likely than those who say the importance being placed on addressing the gap is moderate (86%) or low (75%), to have undertaken digital skills training or learning in the past 12 months and much more likely to say it was a high level of training/learning (56% compared to 20% and 29%).

- Managers who significantly believe (93%) that Government is doing enough to address the digital skills gap are more likely than those who do not believe this (71%) to have undertaken digital skills training or learning in the past 12 months.

Key findings (continued…)

The majority (63%) of managers who have undertaken digital skills training in the last 12 months say their organisation provided and/or supported the training (Q5)

- The majority (63%) of managers who have undertaken digital skills training in the last 12 months say their organisation provided and/or supported the training while one in four (24%) say they received government support. Just 19% of managers say they paid for the training in full themselves.

- Gen Z (32%) and Millennial managers (23%) are more likely than Gen X managers (12%) to say they received government support for the training they undertook in digital skills in the last 12 months, while Gen X (67%) and Millennial managers (66%) are more likely than Gen Z (54%) to say their organisation provided and/or supported the training.

- Managers from West India (67%) and South India (65%) are more likely than those in East India (55%) to say their organisation provided and/or supported the training, while managers in East India (31%) are more likely than those in West India (19%) to say they received government support for the training they undertook in digital skills in the last 12 months.

- Middle managers (73%) are more likely than senior managers (59%) to say their organisation provided and/or supported the training while senior managers are more likely to say it was government supported (26% compared to 17%).

- Managers from organisations with 100+ employees are more likely than those from organisations with 50-99 employees, 20-49 employees and less than 20 employees to say their organisation provided and/or supported the training (75% compared to 57%, 61% and 52%), while managers from organisations with less than 20 employees are more likely to say they paid for the training in full themselves than those from organisations with 100+ employees (25% compared to 13%).

Key findings

- Managers working in manufacturing and business services are more likely to say the digital skills training they undertook in the last 12 months was provided and or supported by their organisation (81% and 73% respectively). Managers working in accounting and education are more likely to say their digital skills training was Government supported (30% and 27%).

- Public sector managers (45%) are twice as likely as private sector managers (18%) to say the digital skills training they undertook in the last 12 months was supported by the government.

- Interestingly, managers who are somewhat confident their organisation has the digital skills it needs to succeed (23%) are more likely than those who are very confident (16%) to say they paid for the digital skills training in full themselves.

- Managers who significantly (28%) or somewhat (21%) believe the government is doing enough to address the digital skills gap are more likely than those who do not (9%) to say the digital skills training they undertook in the last 12 months was provided and or supported by government while those who believe the government is not doing enough are more likely to say they paid for the training in full themselves (45% compared to 21%-somewhat believe and 13% -significantly believe).

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Key findings

Managers surveyed believe the most in demand digital skills for their organisation are digital marketing (48%), social media skills (47%) and data analytics (37%) (Q6)

- Managers surveyed believe the most in demand digital skills for their organisation are digital marketing (48%), social media skills (47%) and data analytics (37%).

- Other digital skills identified as being in demand for organisations include digital design and visualisation (35%), digital business analysis (33%), artificial intelligence (31%) and cybersecurity (28%).

- Millennial managers are more likely than Gen Z managers to believe the most in demand digital skills for their organisation are digital marketing (52% compared to 44%), social media (49% compared to 41%), data analytics (44% compared to 25%) and artificial intelligence (36% compared to 27%).

- Managers in West India are more likely than those in South India to believe that the most in demand digital skills are digital design and visualisation (42% compared to 34%), digital marketing (56% compared to 41%) and cybersecurity (34% compared to 24%).

- Middle managers are more likely than senior managers to believe the most in demand digital skill for their organisation is data analytics (43% compared to 35%).

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Key findings

- Managers from organisations with 100+ employees are more likely than those with less than 20 employees to believe the most in demand digital skills for their organisation are digital marketing (52% compared to 45%), data analytics (52% compared to 23%), cybersecurity (41% compared to 19%) and artificial intelligence (49% compared to 19%).

- Differences also exist between industry sectors with digital design and visualisation identified as the most in demand digital skill by managers working in engineering/design/architecture (50%) and business services (46%); digital business analysis by managers in business services (50%), manufacturing (43%) and technology services (43%); digital marketing by managers in business services (64%) and financial services (57%); social media by managers in business services (53%); data analytics by managers in technology services (53%) and financial services (48%); cybersecurity by managers in technology services (43%); and artificial intelligence by managers in technology services (55%) and business services (49%).

- Private sector organisations are more likely than public sector and not for profits to identify digital marketing (54% compared to 34% and 32%), data analytics (42% compared to 27% and 25%) and digital business analysis (38% compared to 27% and 17%) as the most in demand digital skills for their organisation.

- Not surprisingly, managers who said that their senior management placed a high level of importance on addressing the digital skills gap are more likely to say each of the digital skills was in demand for their organisation.

Key findings

<u>More than eight in ten (86%) of the managers surveyed believe the government is doing enough to address the digital skills gap (Q7)</u>

- More than eight in ten (86%) of the managers surveyed believe the government is doing enough to address the digital skills gap while 10% do not and 4% are unsure.

- Gen Z (53%) and Millennial managers (51%) are more likely than Gen X (41%) to significantly believe that the Government is doing enough to address the digital skills gap.

- Managers in East India (90%) and North India (87%) are more likely than those in West India (80%) to believe that the Government is doing enough to address the digital skills gap.

- Similarly, managers from larger organisations with 100+ employees (90%), 50-99 employees (91%) and 20-49 employees (92%) are more likely that those with less than 20 employees (80%) to believe the government is doing enough to address the digital skills gap.

- Managers working in education (91%) are most likely to believe that the government is doing enough to address the digital skills gap.

- Public sector managers (96%) are also more likely than those in the not for profit (87%) and private sectors (85%) to believe the government is doing enough to address the digital skills gap.

- Managers who said that their senior management placed a high level of importance on addressing the digital skills gap (91%) are more likely than those who say the importance being placed on addressing the gap is moderate (84%) or low (82%) to believe the government is doing enough to address the digital skills gap.

Key findings (continued…)

The majority (57%) of managers believe that the government needs to provide more support for small business and regional businesses to embrace digital technology and reskill/transition their workforce to help accelerate digital skills in the workforce (Q8)

- The majority (57%) of managers surveyed believe that the government needs to provide more support for small business and regional businesses to embrace digital technology and reskill/transition their workforce to help accelerate digital skills in the workforce.

- Other actions managers believe government should take to help accelerate digital skills in the workforce include to create more campaigns to encourage business leaders/senior management to upskill their digital knowledge and skills (47%), provide more subsidies for courses in digital skills (42%), increase placements in higher education (41%) and provide more tax incentives for organisations (33%).

- Gen X and Millennial managers are more likely than Gen Z managers to believe the government should provide more subsidies for courses in digital skills to help accelerate digital skills in the workforce (51% and 45% compared to 29%), provide more support for small business and regional businesses to embrace digital technology and reskill/transition their workforce to help accelerate digital skills in the workforce (63% and 58% compared to 49%) and create more campaigns to encourage business leaders/senior management to upskill their digital knowledge and skills (51% and 50% compared to 39%).

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Key findings (continued…)

- Managers in West India are more likely than those in South India to believe that the government should provide more subsidies for courses in digital skills (46% compared to 37%) and tax incentives for organisations (40% compared to 31%). Managers in West India and North India are more likely than those in South India to believe the government should create more campaigns to encourage business leaders/senior management to upskill their digital knowledge and skills (52% respectively compared to 37%).

- Managers from organisations with 100+ employees are more likely than those with less than 20 employees to believe that the government should provide support for small busines and regional businesses to embrace digital technology and reskill/transition their workforce (66% compared to 51%), create more campaigns to encourage business leaders/senior management to upskill their digital knowledge and skills (59% compared to 39%), increase placements in higher education (54% compared to 30%) provide more subsidies for courses in digital skills (48% compared to 38%) and provide tax incentives for organisations (40% compared to 26%) to help accelerate digital skills in the workforce.

- Managers from manufacturing, business services and technology services are more likely to believe that the government should provide more support for small business and regional businesses to embrace digital technology and reskill/transition their workforce (69%, 65% and 69% respectively) and increase placements in higher education (51%, 53% and 53% respectively).

- Middle managers are more likely than senior managers to believe the government should increase placements in higher education (48% compared to 39%) and create more campaigns to encourage business leaders/senior management to upskill their digital knowledge and skills (54% compared to 45%).

Key findings (continued…)

- Private sector managers are more likely than public sector and not for profit managers to believe that the government should provide more subsidies for courses in digital skills to help accelerate digital skills in the workforce (45% compared to 34% and 32%) and increase placements in higher education (46% compared to 33% and 32%).

Nine in ten (93%) managers surveyed believe that there are barriers for their organisation acquiring additional digital skills (Q9)

- Nine in ten (93%) managers surveyed believe that there are barriers for their organisation acquiring additional digital skills.

- Most commonly, the key impediment was identified as a lack of resources to invest in digital transition (15%), a short term focus rather than focusing on long term gains (15%), and a lack of suitable candidates/people with the right digital skills (14%).

- Other barriers managers raised include a lack of knowledge and expertise (14%), a lack of relevant training and education courses (14%), and having a culture resistant to change (12%).

- Gen Z (95%) and Millennial managers (94%) are more likely than Gen X managers (87%) to believe there are barriers for their organisation acquiring additional skills and in particular are more likely to think the key impediment is having a culture resistant to change (12% and 14% compared to 6% respectively).

Key findings (continued…)

- Managers in North India (17%) are more likely than those in East India (9%) and West India (10%) to identify a lack of relevant training and education courses as the key impediment for their organisation acquiring additional digital skills.

- Organisations with 20-49 employees (20%) are more likely than those with less than 20 employees (11%) and those with 100+ employees (11%) to identify having a culture that is resistant to change as the biggest impediment for their organisation acquiring additional digital skills.

- Interestingly, Managers who say their senior management places a high level of importance (15%) on addressing the digital skills gap are more likely than those who say it is only a moderate (9%) or low level (5%) to identify having a culture resistant to change as the key impediment for their organisation acquiring additional digital skills. Not surprisingly, those who say senior management only places a low level of importance on this issue (18%) are more likely than those who say it is a moderate (11%) or high level (8%) to identify a lack of vision or plan as the key impediment.

Key findings (continued…)

<u>The sector managers surveyed believe is most equipped in acquiring and developing digital skills, is technology and communications (35%) (Q10)</u>

- The sector managers surveyed believe is most equipped in acquiring and developing digital skills, is technology and communications (35%). This was followed by education (16%) and financial services (12%).

- Middle managers (40%) are more likely than Senior managers (33%) to believe that the technology and communications sector is most equipped in acquiring and developing digital skills.

- Larger organisations with 100+ employees (45%) and 50-99 employees (37%) are more likely than those with 20-49 employees (24%) and less than 20 employees (27%) to believe the technology and communications sector is most equipped in acquiring and developing digital skills. In contrast, organisations with less than 20 employees (19%) and 20-49 employees (21%) are more likely than those with 100+ employees (11%) to think education is the sector most equipped in acquiring and developing digital skills.

- Interesting, managers in each sector are more likely to rate their own industry as most equipped in acquiring and developing digital skills with 71% of managers in technology services rating their sector as most equipped compared to 35% of managers overall; 33% of managers in financial services rating their sector as most equipped compared to 12% overall; 41% of managers in education rating their sector as most equipped compared to just 16% overall, 30% of managers in retail rating their sector as most equipped compared to just 6% overall; and 24% of managers in the health/medical field rating their industry as most equipped compared to 6% overall.

Key findings (continued…)

- Similarly, managers in private sector organisations are more likely than public sector managers to identify technology and communications as the sector most equipped in acquiring and developing digital skills (38% compared to 24%) while public sector managers are more likely to think it is education (21% compared to 14%) or the government (13% compared to 4%).

To improve its digital competitiveness ranking, managers believe India needs to focus most on digital skills training, to have a highly skilled digital ready workforce (24%) and better technology infrastructure such as strong broadband and internet penetration (22%) (Q11)

- To improve its digital competitiveness ranking, managers believe India needs to focus most on digital skills training, to have a highly skilled digital ready workforce (24%) and better technology infrastructure such as strong broadband and internet penetration (22%).

- Other actions, managers surveyed believe India should focus on most to improve its digital competitiveness ranking include more expenditure on innovation (16%) and an improved regulatory framework, to make it easier for businesses to thrive and invest (16%).

- Managers in West India (21%) are more likely than those in North India (14%) and South India (13%) to believe India needs to focus most on an improved regulatory framework to make it easier for businesses to thrive and invest to improve its digital competitiveness ranking.

- Similarly, middle managers (21%) are more likely than senior managers (14%) to believe India needs to focus most on an improved regulatory framework to make it easier for businesses to thrive and invest to improve its digital competitiveness ranking.

Key findings (continued…)

- Interestingly, managers in financial services (27%) are more likely to think India needs to focus most on improving its regulatory framework to make it easier for businesses to thrive and invest (compared to 16% of managers overall) to improve its digital competitiveness ranking.

- Managers who say senior management place a high level of importance on addressing the digital skills gap (25%) are more likely than those who say only a low level of importance is placed on this (13%) to believe India needs to focus most on digital skills and training, to have a highly skilled digital ready workforce to improve its digital competitiveness ranking.

Nine in ten (92%) managers say their organisation has plans in place to fill their 'digital skills gap' (Q12)

- Nine in ten (92%) managers say their organisation has plans in place to fill their digital skills gap while just 8% say they don't.

- Most commonly, organisations are planning for supplementary skilling, reskilling and/or upskilling training (45%), outsourcing the requirements to another organisation or planning to introduce technology to plug the gap (44%) and hiring additional digital skilled talent (38%).

- Younger managers, Gen Z (95%) and Millennials (94%) are more likely than Gen X (86%) to say their organisations have plans in place to fill their digital skills gap.

- Managers in East India (46%) are more likely than managers in North India (36%) and South India (36%) to say their organisation plans to hire additional digital skilled talent to fill their digital skills gap.

Key findings (continued…)

- Managers from larger organisations with 100+ employees (46%), 50-99 employees (46%) and 20-49 employees (41%) are more likely than those with less than 20 employees (29%) to say their organisation plans to fill their digital skills gap through hiring additional digital skilled talent.

- Managers in engineering/design/architecture (58%) are more likely to say they plan to fill their digital skills gap by outsourcing the requirements to another organisation or planning to introduce technology to plug the gap (compared to 44% of managers overall). In contrast, managers in technology services are more likely to say they will use supplementary skilling, reskilling and/or upskilling training (65% compared to 45% overall) and hire additional digital skilled talent (56% compared to 38% overall) to fill their digital skills gap.

- Public sector managers (54%) are more likely than private sector managers (43%) to say their organisation has plans to fill its digital skills gap through outsourcing the requirements to another organisation or planning to introduce technology to plug the gap while private sector managers are more likely to say they will close the gap through hiring additional digital skilled talent (41% compared to 30%).

- Not surprisingly, managers who are very confident their organisation has the digital skills it needs to succeed are more likely than managers who are only somewhat confident of this to say their organisation will fill the digital skills gap through hiring additional digital skilled talent (43% compared to 29%) and outsourcing the requirements to another organisation or planning to introduce technology to plug the gap (47% compared to 38%).

Key findings (continued…)

- Similarly, managers who say senior management place a high level of importance on addressing their digital skills gap (96%) are more likely than those whose senior management place a moderate (91%) or low level (80%) of importance to say their organisation has plans in place to fill their digital skills gap.

Thank you

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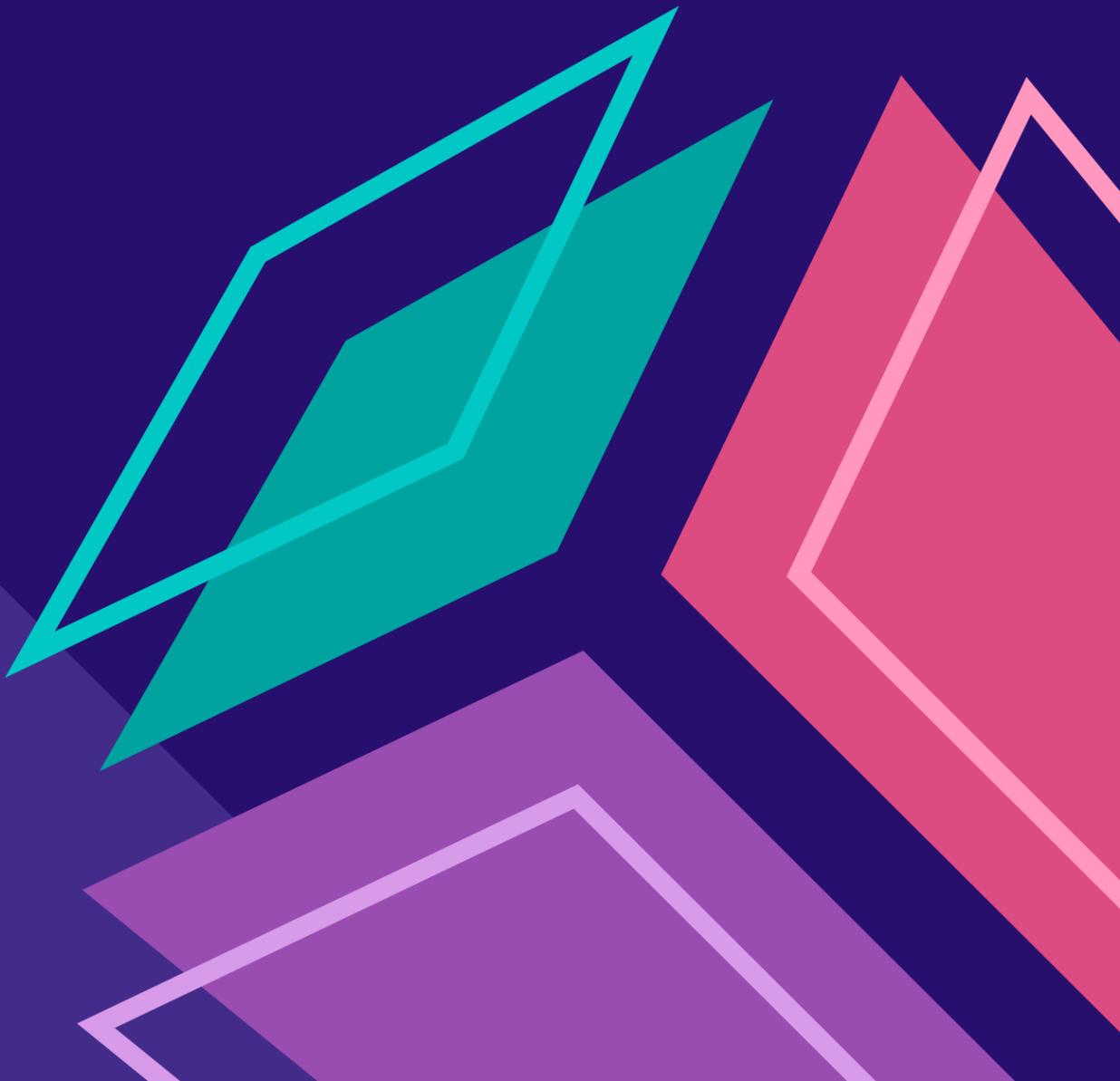
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