

Narrowing the divide: What workers deem important versus their actual work experiences

PwC's Global Workforce Hopes and Fears Survey 2024 – African Perspectives

July 2024



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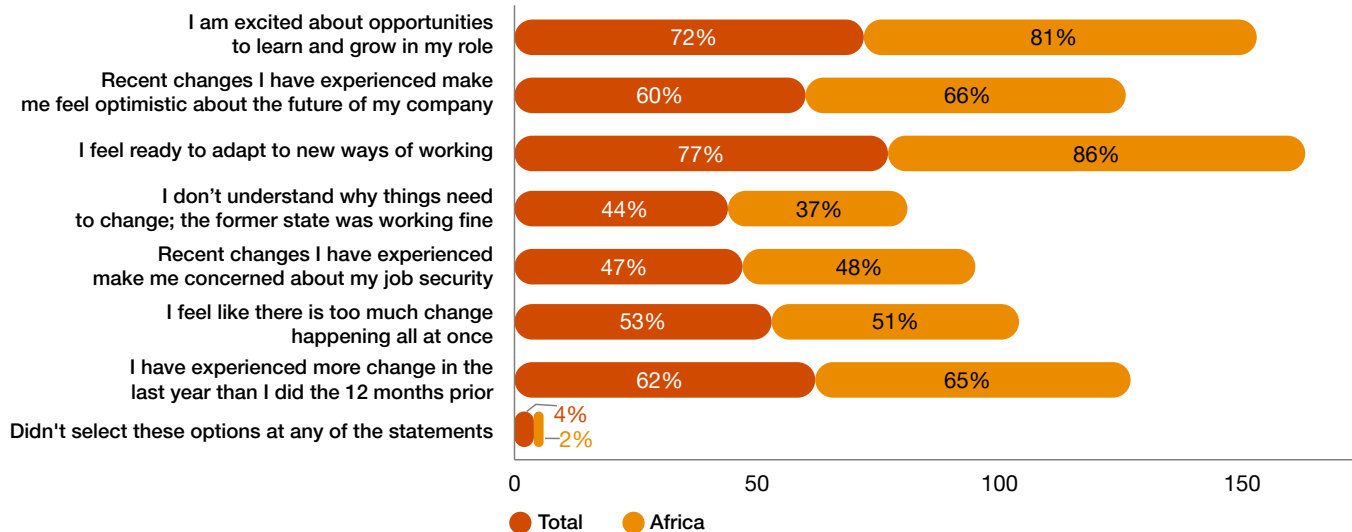
Emerging themes in the global workforce

PwC's latest Global Workforce Hopes and Fears Survey, canvassing over 56,000 workers across 50 countries and territories, highlights a workforce grappling with rapid change. More than half of the workforce feel overwhelmed by the pace of workplace transformation, with 44% struggling to grasp the rationale behind these changes.

The African landscape mirrors this global trend, with workers reporting increased workloads, and shifts in team dynamics and daily responsibilities. There is, however, a silver lining. Globally, employees are demonstrating readiness to engage and embrace change and disruption. There is a palpable sense of excitement and optimism surrounding continuous learning and the integration of new technologies, like GenAI, to enhance efficiencies in the workplace.

This evolving workplace scenario underscores an increased need for leadership intervention, both globally and across Africa, specifically.

Thinking about changes you have experienced in your role in the last 12 months, to what extent do you agree or disagree with the following statements?



Guide employees through the transformation journey

Help employees understand the purpose behind change initiatives

Empower their workforce to anticipate, design and implement change effectively

These actions are crucial for navigating the rapidly changing work environment and ensuring that employees are not just adapting to change, but actively participating in shaping it.

Building a change-ready workforce: Six key actions

Leading through transformation

Lead in new ways to build resilience among a stressed-out workforce

Engage employees on change to drive transformation

Navigating the GenAI revolution

Help employees lead on innovation

Instil confidence in GenAI

Fueling performance through upskilling and the employee experience

Recognise how critical skill-building is to workers

Prioritise the employee experience for performance



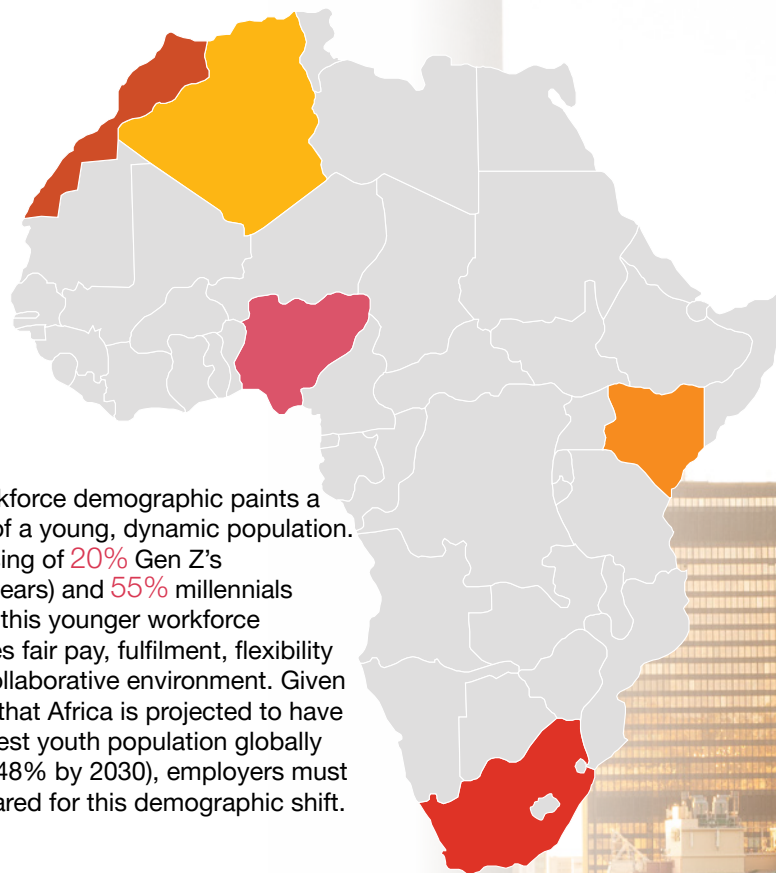
A snapshot of Africa today

PwC's Global Hopes and Fears Survey gathered responses from **2,000** participants across South Africa, Kenya, Morocco, Nigeria and Algeria, revealing a complex landscape of challenges and opportunities in the African workforce.

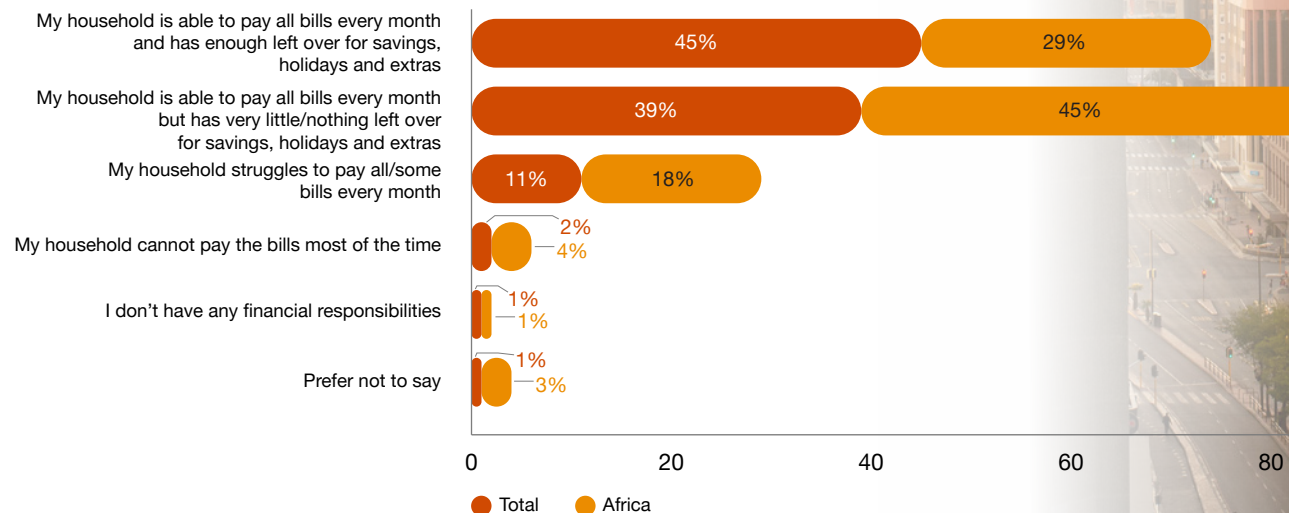
29% of employees across Africa—a slight increase from 2023 (27%)—are able to pay their bills monthly compared to 45% globally.

45% of the African workforce say that they have very little to nothing left over for savings, holidays and extras. This has significant implications for employers' employee value proposition and calls for attention to macroeconomic policies at a government level.

The workforce demographic paints a picture of a young, dynamic population. Comprising of **20%** Gen Z's (18–27 years) and **55%** millennials (28–43), this younger workforce prioritises fair pay, fulfilment, flexibility and a collaborative environment. Given the fact that Africa is projected to have the highest youth population globally (almost 48% by 2030), employers must be prepared for this demographic shift.



Which of the following best describes your current financial situation?

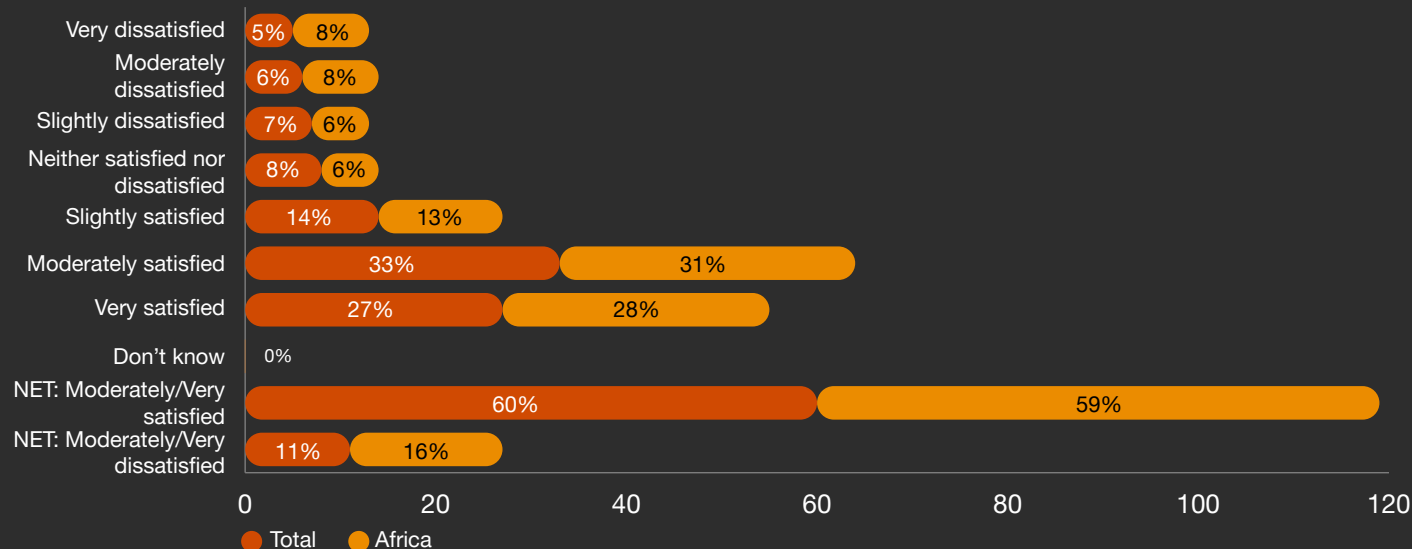


Our survey reveals that **65%** of respondents work in office jobs such as finance, IT, customer service and HR. This high percentage prompts leaders to consider how to create environments where these employees can thrive. However, this finding contrasts with the broader African context, where the informal sector employs a significant portion of the workforce. This disparity raises questions about Africa's future growth. Is there a need to expand beyond these support roles into more 'core' business areas? The data suggests a potential misalignment between current employment patterns and optimal organisational structures, highlighting the need for strategic workforce planning to support sustainable economic growth across Africa.

Our survey shows significant employment in two key sectors across Africa: **24%** in industrial manufacturing and automotive (IM&A) and **23%** in government and public sector (G&PS)—higher than the global G&PS average of 15%. Both industries face substantial changes due to technology, consumer preferences and economic shifts, leading to workforce disruption. The high G&PS employment, which has reached nearly 32% over the past decade, warrants a re-evaluation of public sector employment strategies and their economic impact.

54% of respondents across Africa (less than 10% globally) work for smaller organisations (less than 250 employees), potentially exposing them to faster workplace changes.

How satisfied are you with your job?



51% of the African workforce stated that their work can be done from home, indicating that remote work remains significant.

59% of respondents embrace hybrid working models despite efforts to bring employees back to the office post-pandemic. The big question is whether organisations have adapted to this new work paradigm by implementing the necessary digital assets, processes and policies. The debate between remote and office-based work seems settled: hybrid is the preferred approach. Organisations must now focus on effective hybrid work implementation, considering options like flexible choices and varied remuneration.



59% of the African workforce reports job satisfaction this year, an increase from 55% last year, with exposure to specialised training being a contributing factor.

90% of the African workforce surveyed feel a sense of confidence in their job security over the next 12 months, despite some feelings of anxiety related to the volume and speed of change.

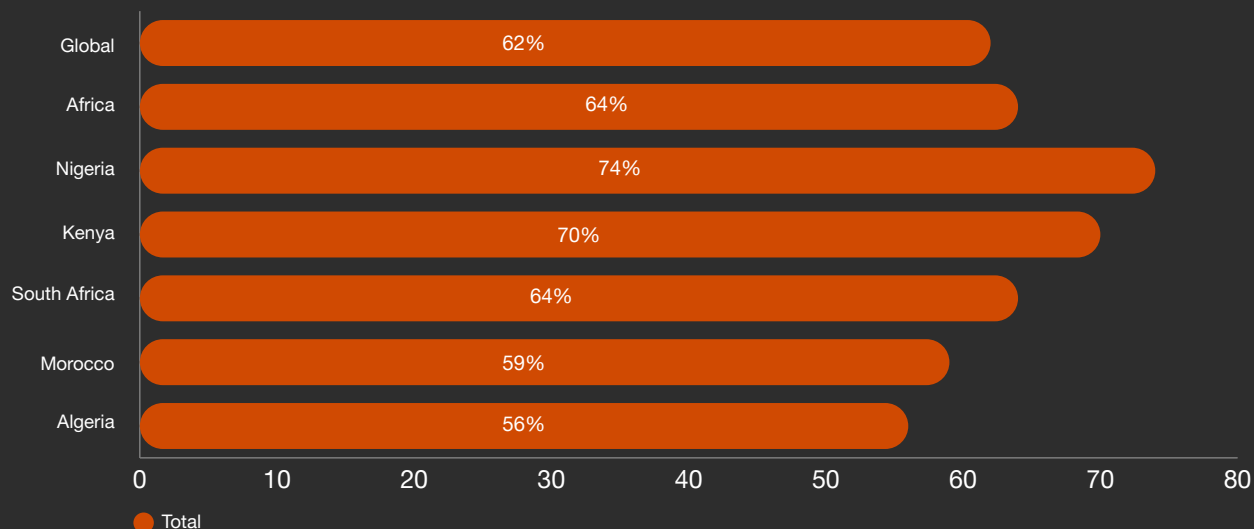
48% of the African workforce believe the skills required for their job will change significantly over the next five years, compared to 36% globally. More than two thirds say their current job duties align with their skills and expertise.

56% of workers across Africa prioritise skill development opportunities when deciding to stay with their current employer, compared to 47% globally.

22% believe performance-based pay would improve their job performance.

64% of African respondents report wasting time on administrative tasks (e.g. emails, technology issues and performance reviews), leading to feelings of underutilisation, overload, frustration and inefficiency. This trend highlights the need for businesses to invest in automation and more effective use of technology for transactional processes.

On average, what percentage of your time spent at work on administrative activities is efficient?



54% of the African workforce (compared to 46% globally) anticipate that technological changes, such as GenAI, will significantly impact their jobs in the next three years.

57% believe climate change will pose substantial health and safety risks to their jobs (compared to 44% globally). This perception underscores the need for organisations to prioritise and implement deliberate ESG initiatives.

86% of workers are ready to adapt to new ways of working. This raises questions about:

What specific new work methods are emerging?

What factors drive this high level of readiness?



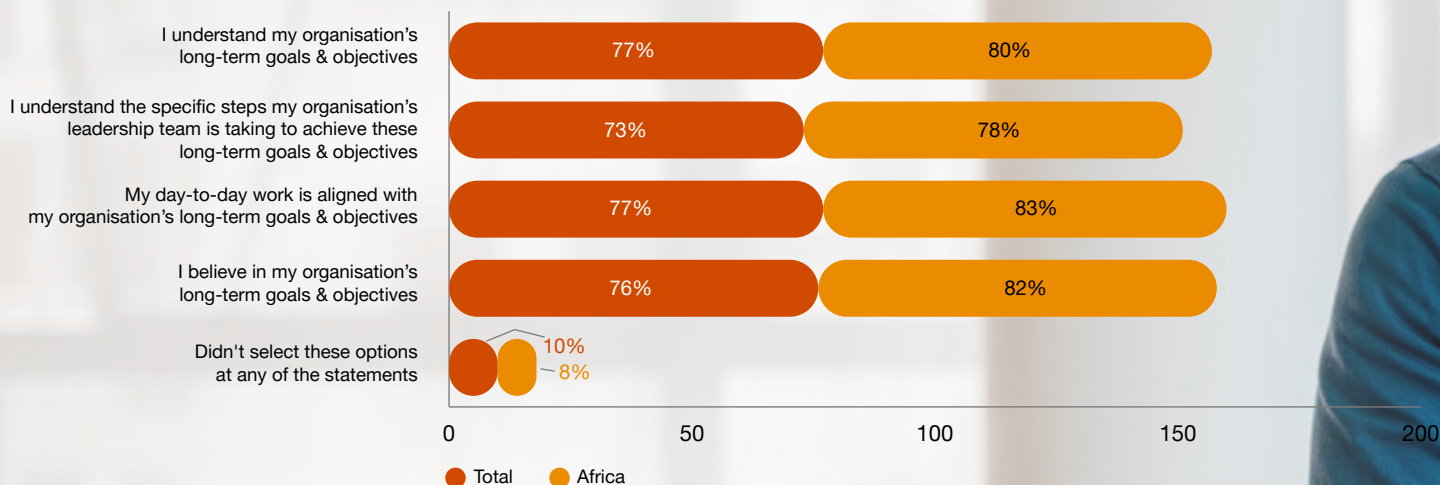
Leading through transformation

Leaders should maintain clear long-term direction, as most African workers understand and believe in their organisation's goals and have a sense of purpose.

66% of the African workforce are excited about recent changes and their potential positive impact on their organisation's future.

Leaders must capitalise on this positive energy while simultaneously managing the fatigue and stress associated with constant change.

Thinking about your organisation's long-term goals & objectives, to what extent do you agree/disagree with the following statements?



Lead in new ways to build resilience among a stressed-out workforce

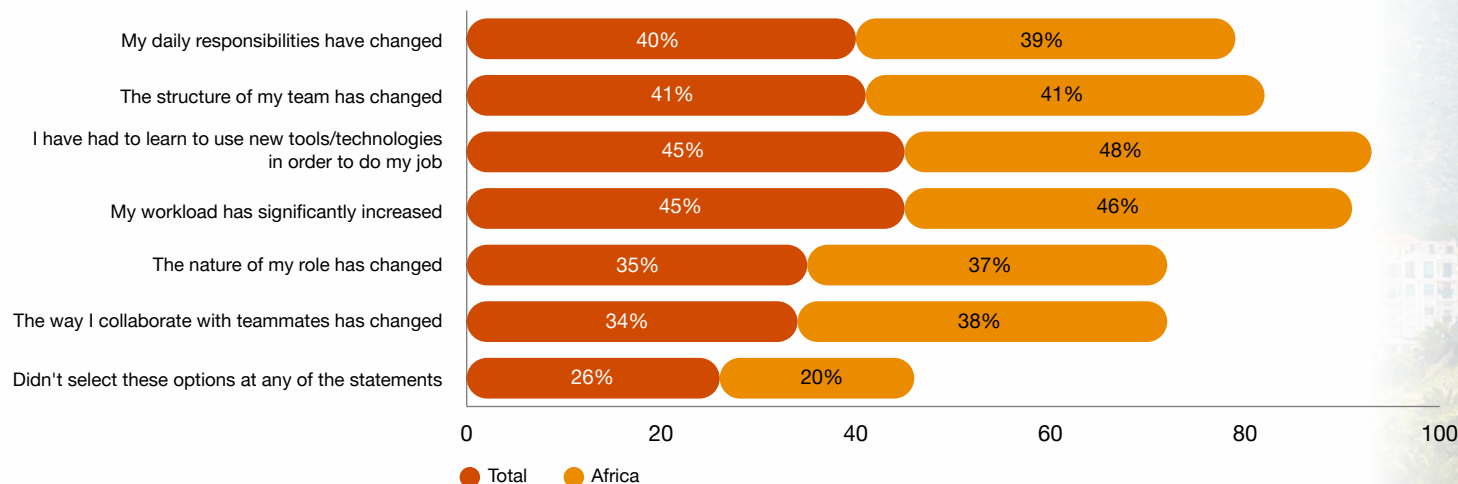
Now, more than ever before, leaders need to put care at the centre of everything that they do.

The risk of burnout is high, with over half of the African workforce reporting significantly increased workloads in the past 12 months. This surge appears to be driven by:

- Major changes in daily roles and responsibilities
- A need for training on new technologies
- Structural team changes

These factors result from organisations rethinking their operating models and work methods in response to broader changes.

To what extent do the following statements describe changes you have experienced in your role, if any, in the last 12 months?



This situation, combined with financial stresses, has left the workforce feeling overwhelmed by change. Nearly half of the African workforce express concern about job security due to recent organisational changes. This may result in employees either becoming overly cautious or seeking opportunities elsewhere.

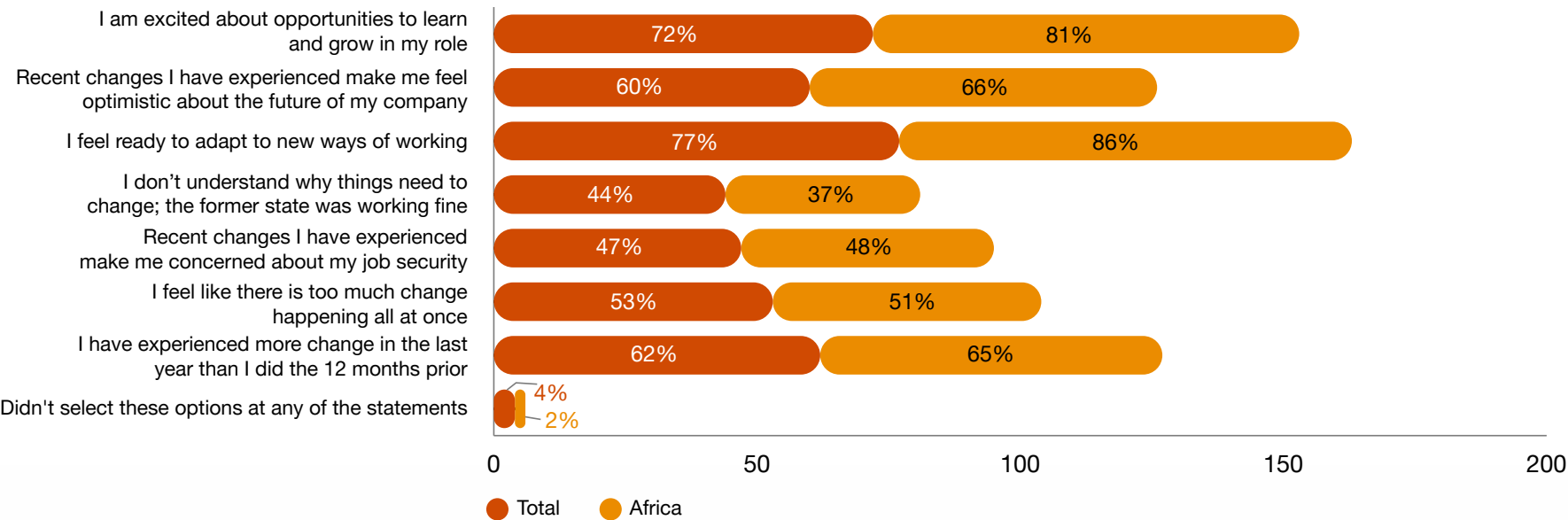
Leaders must therefore:

Create psychologically safe spaces for dialogue

Reassure workers

Provide a sense of certainty during these uncertain times

Thinking about changes you have experienced in your role in the last 12 months, to what extent do you agree or disagree with the following statements?



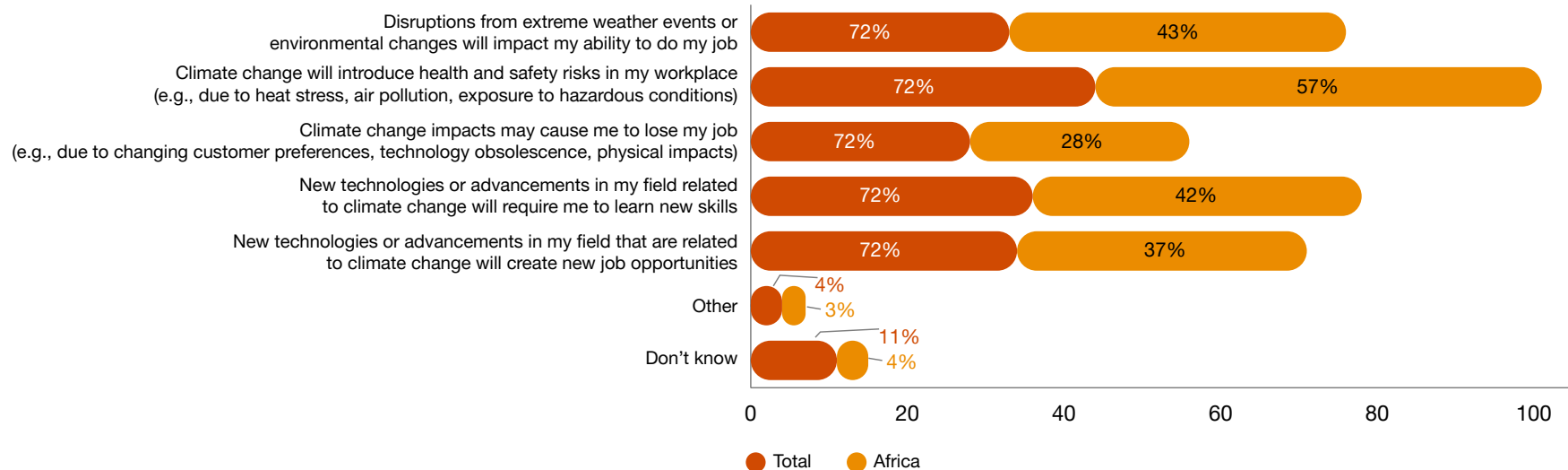
Engage employees on change to drive transformation

The quality of engagement matters more than the quantity, suggesting that workers want to be a part of solutions to changes relating to technology, the environment, customer preferences and organisational goals and objectives. They believe that these factors, coupled with other economic and political factors, will impact their jobs over the next three years.

Climate change is top of mind for many workers and CEOs across Africa

Creating a culture of health and safety is a priority across industries, but specifically within the health and industrial manufacturing and automotive industries, since the majority of the African workforce feel that climate change will introduce health and safety risks in the workplace.

In what ways do you think climate change will impact your job?



The transition to a sustainable economy has also accelerated the importance of green skills, with the demand for jobs in this sector on the rise. Green skills comprise the knowledge and competencies needed to ensure organisations operate sustainably and drive their sustainability agenda. Sustainability specialists and environmental protection professionals are expected to grow by **33% and 34% respectively, translating to a growth of approximately 1 million jobs globally**. This prediction aligns with business leaders' expectations for the green transition and climate-mitigation investments that are expected to drive job growth.

Navigating the GenAI revolution

Generative artificial intelligence (GenAI) is revolutionising ways of work and transforming how employees create value, apply information and deliver results at an unprecedented speed and scale. The [PwC AI Jobs Barometer reports](#) that AI specialist job growth has outpaced overall job growth since 2016, with AI roles expanding 3.5 times faster than all jobs since 2012.

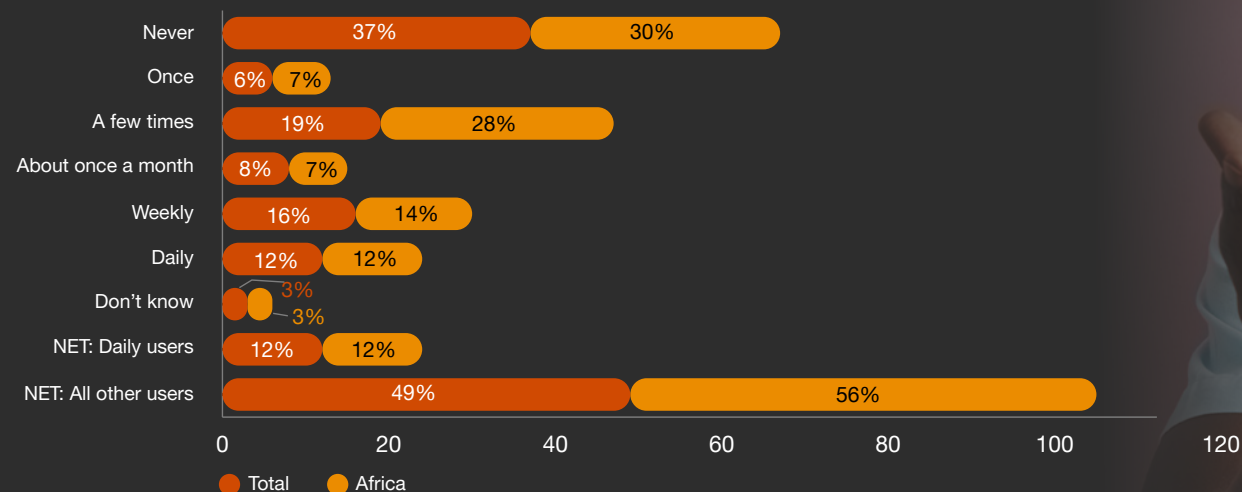
However, widespread GenAI adoption in the workplace is still limited:

30% of workers report never using GenAI tools (e.g. ChatGPT, DALL-E) for work in the past 12 months.

Only 244 out of 2,000 employers report using GenAI tools in daily work.

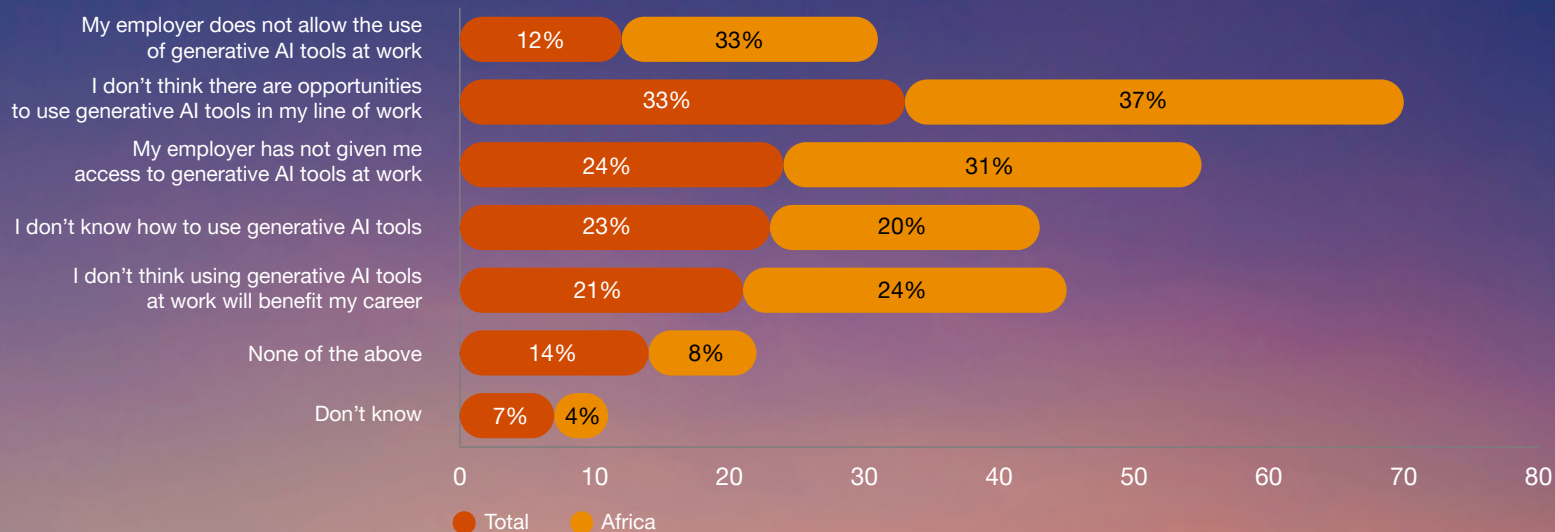
Help employees lead on innovation

In the past 12 months, how frequently, if at all, have you used generative AI tools (e.g., ChatGPT, DALL-E, etc.) for work?



With an increase in AI jobs and roles requiring specialist AI skills, it is imperative that workers are empowered to adapt to an AI era and to build new skills. Employees in roles most exposed to GenAI will need to build and demonstrate new competencies and capabilities that will ensure relevance in a labour market characterised by accelerated technological advancements. [PwC's 2024 Global CEO Survey](#) makes it clear that 69% of CEOs anticipate that GenAI will require most of their workforce to develop new skills. To maximise the opportunities presented by GenAI, it is crucial that organisations equip and empower employees to experiment and rethink how work gets done.

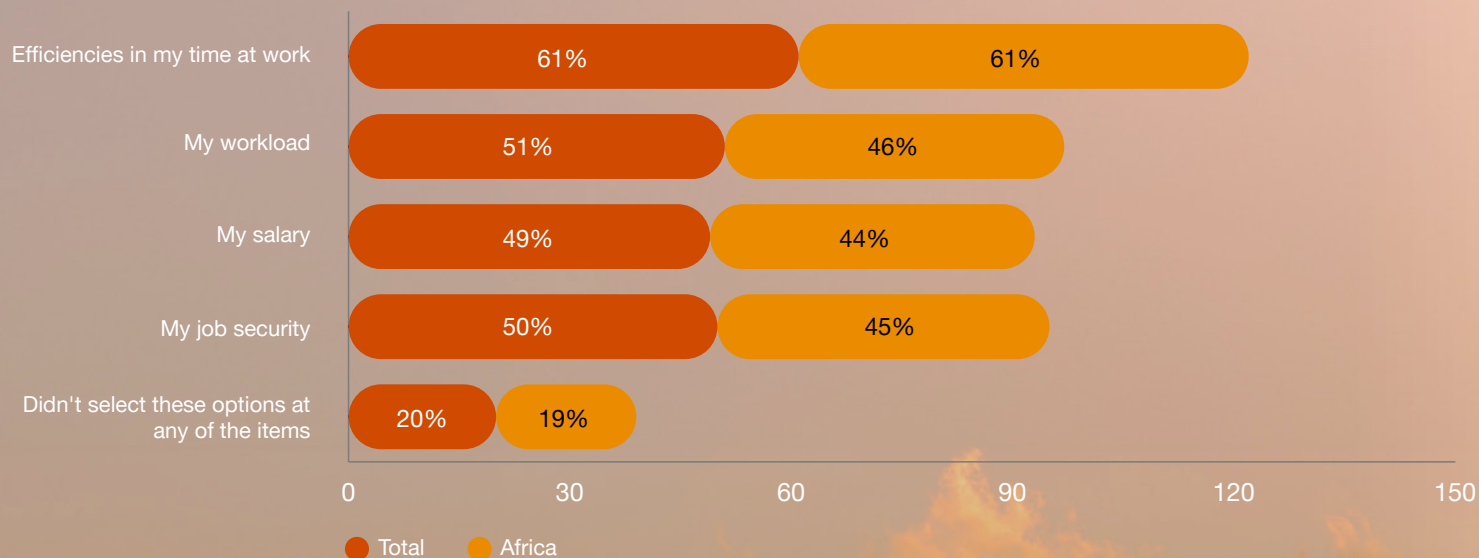
Which of the following statements best describes why you have not used generative AI at work?



Instil confidence in GenAI

With **37%** of employees reporting lack of opportunities to use GenAI tools in their work and **31%** further stipulating prohibited access to GenAI tools at work, key areas of action for employers and employees in the age of AI will be to embrace, experiment with and pioneer new uses for AI. In addressing why some employees (and leaders) are not exploring AI capabilities, organisations need to build a climate of confidence and trust in using AI. Then people would be more likely to try it and close the knowledge gap of the **23%** of employees who are unsure about how to use these tools.

In the next 12 months, to what extent do you think generative AI will increase or decrease the following aspects of your job?

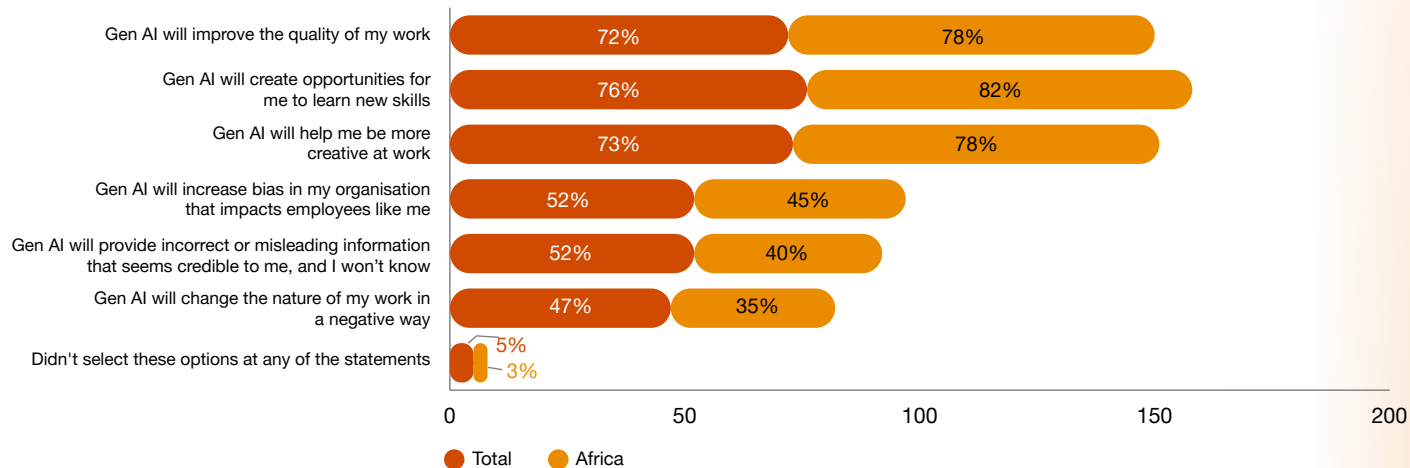


Employee sentiment around GenAI improving operational efficiency is increasing. More than half of surveyed workers (61%) are confident that the use of GenAI will ensure more efficient time spent at work and a further 51% believe the volume of tasks performed will be better managed with the use of AI tools. **Both CEOs (64%)** and workers are aligned on GenAI being fundamental in streamlining work processes, relieving organisational friction and reducing wasted time at work. Business leaders are further embracing the new ways GenAI can generate value in the workplace and how AI is a complement to workers. Indeed, 69% of CEOs believe unlocking the transformative benefits of the tool will require workforce upskilling.

Furthermore, the **AI Jobs Barometer** reports that sectors with the highest AI penetration are seeing an almost fivefold (4.8x) growth in labour productivity. However, streamlining organisational processes cannot entirely be eased by technology: establishing ways of working through policies and behaviours that ensure efficiency will also be crucial.

Sentiments about the future impact of GenAI

Thinking about the potential impact of Gen AI tools on your career, to what extent do you agree/disagree with the following statements?



Employees who have used GenAI believe it will cultivate new opportunities for skills building (76%), spark their creativity (73%) and elevate the quality of their work (72%).

Despite GenAI's potential, employees harbour concerns:

52% fear organisational biases impacting them

52% worry about unrecognisable misinformation

47% anticipate negative impacts on the nature of work

As with any technology, employees acknowledge GenAI's strengths and weaknesses. Despite recognising potential risks, their overall perception of GenAI remains more positive than negative.

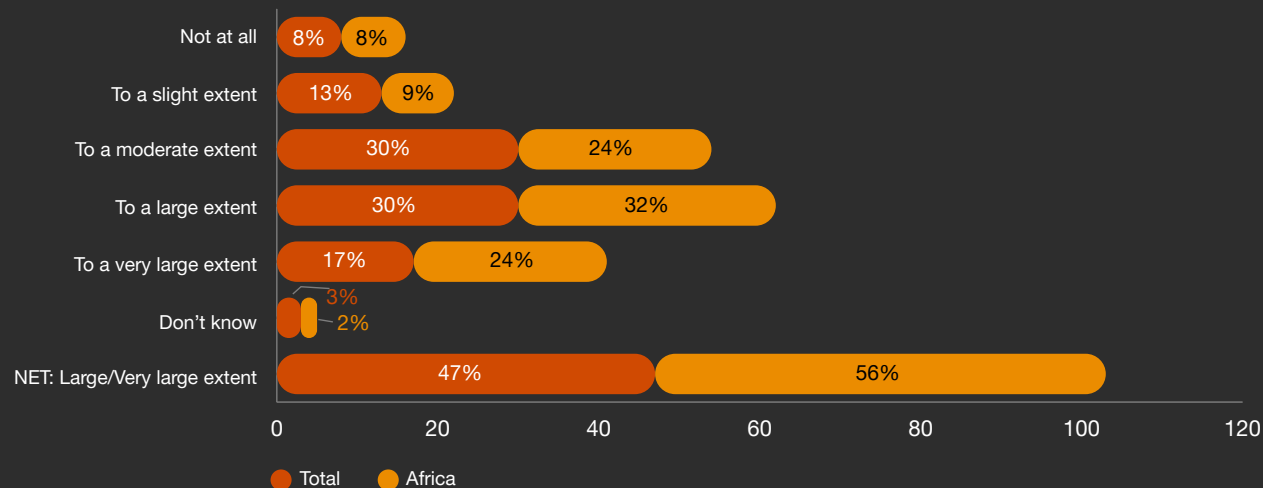
Fueling performance through upskilling and the employee experience

Embrace skills as the new currency

A movement towards a skills-centric paradigm is emerging. For employees, this means that having the opportunity to acquire and build necessary skills is non-negotiable. 56% of workers agree that the decision to stay or leave their current employer is largely determined by the opportunity to learn new skills. Employees are now well aware that the labour landscape is rapidly evolving, with businesses pivoting from jobs and entering an era where skills are the currency of the future.

Research jointly spearheaded by the World Economic Forum and PwC shines light on the **skills-first** approach, which emphasises the importance of skills and competencies as primary determinants of an individual's potential for success in a specialised role, rather than formal qualifications and historical job roles. The right and relevant skills will be critical for relevance and adaptability in a dynamic market and employees are recognising the value of upskilling as a key company differentiator.

Thinking about your decision to stay with your current employer or switch to a new one, to what extent would opportunities to learn new skills influence that decision?

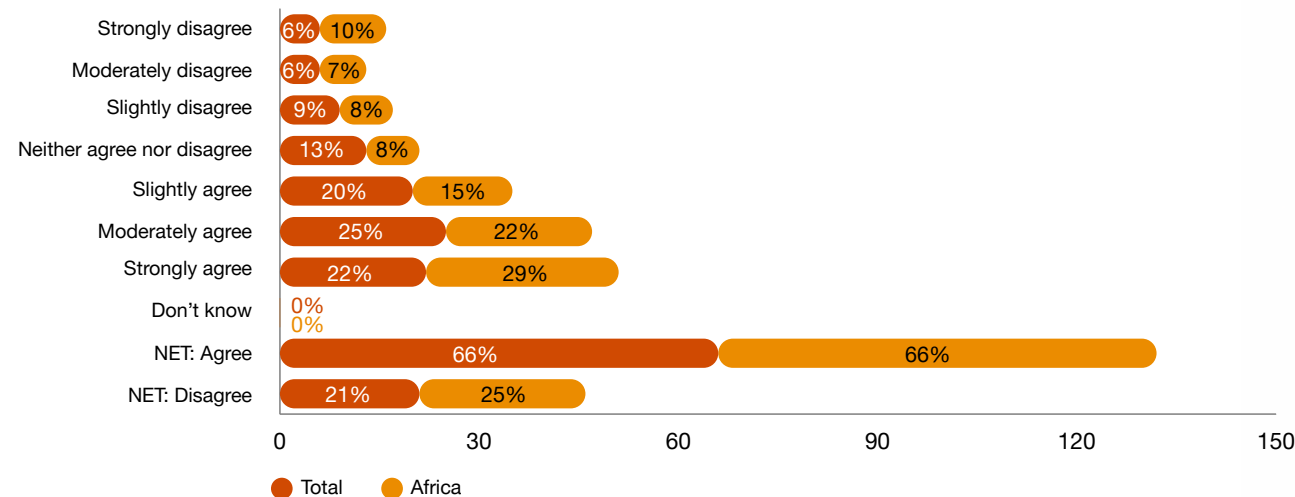


A decade of upskilling

Leaders are also aware that skills are the golden thread for organisational success. The PwC Global CEO Survey indicates that 45% of CEOs in sub-Saharan Africa and 52% of CEOs worldwide are anticipating that labour and skills shortages will have a significant impact on their profitability in the next decade. Now more than ever, it is imperative for organisations to not only nurture the skills that employees will need throughout their careers, but to further develop workforce skills that will be crucial to achieving business goals and transformation.

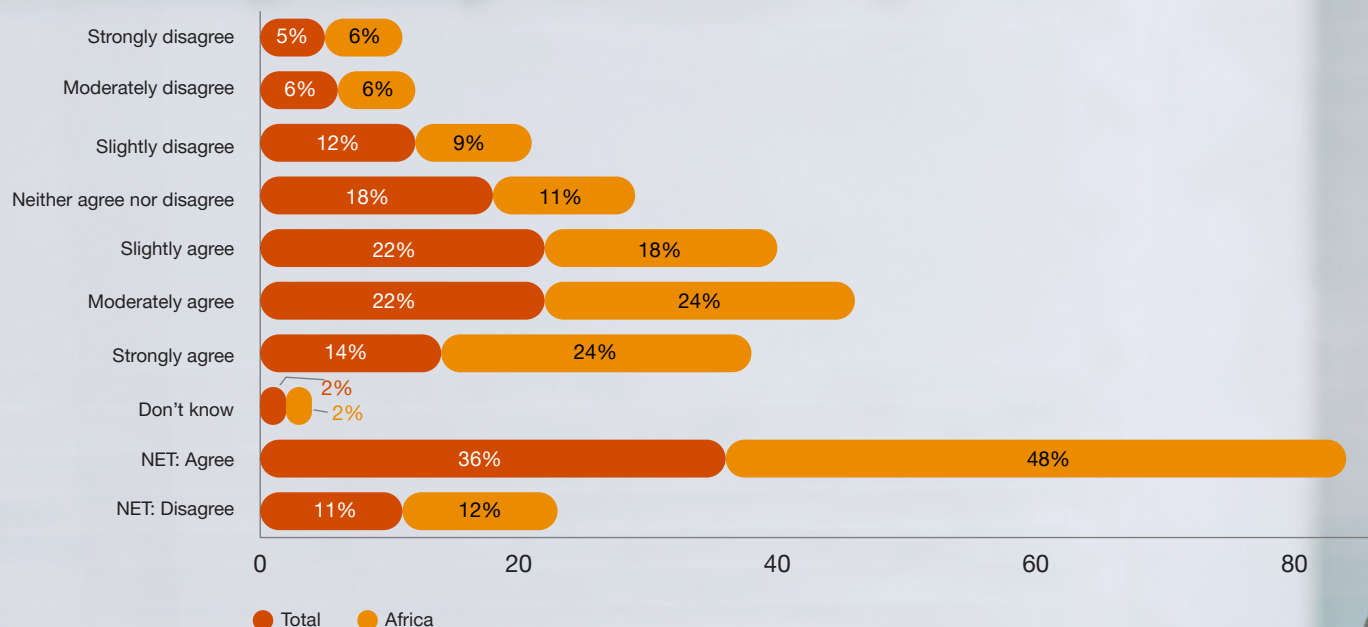
A large majority (66%) agree that there are ample learning opportunities within their organisations. This highlights the effort by organisations to address skills gaps, provide platforms for upskilling and encourage skill development. However, even with well-developed upskilling programmes in place, organisations should consider whether they are reaching all employees, as evidenced by the 25% of employees who feel that their employer does not provide adequate opportunities to develop new skills.

To what extent do you agree or disagree with the following statement: My employer provides me with adequate opportunities to learn new skills that will be helpful for my future career?



Perception of skill change

Regarding your current role, to what extent do you agree or disagree with the following statements? (The skills my job requires will change significantly in the next five years)



Many global developments are accelerating the pace of change in the job market, resulting in evolving skills requirements and increased knowledge gaps. Our publication Global Workforce Hopes and Fears Survey 2023 — African Perspectives highlighted the growing skills gaps phenomenon, with 49% of employees expressing that the skills required in their role will change significantly over the next five years. This year's survey results indicate a growing 66% of employees who recognise that there will be a mismatch between skills possessed and skills required in the next five years. Organisations will need to prepare their workforce for the future by analysing the demand and supply of required skills and giving employees the opportunity to build the critical competencies that they will need to fully participate in the workplace.



Consideration for leaders

These findings emphasise the importance of fostering a culture of continuous learning to provide employees at all levels opportunities to develop relevant, adaptable skill sets. This focus on skills development benefits both employees and employers.

As businesses aim for long-term economic viability through model reinvention, and workers strive to remain future-fit, skills become the nexus of these aspirations.

Key actions:

Implement skills inventories to gain comprehensive insights into workforce expertise

Ensure skill-building programmes reach all employees

Shift to a skills-first approach, removing barriers to employees' ability to apply their skills and contribute effectively

This strategy helps companies, workers and society by optimising skill utilisation and contribution in the workplace.

Prioritise the employee experience for performance

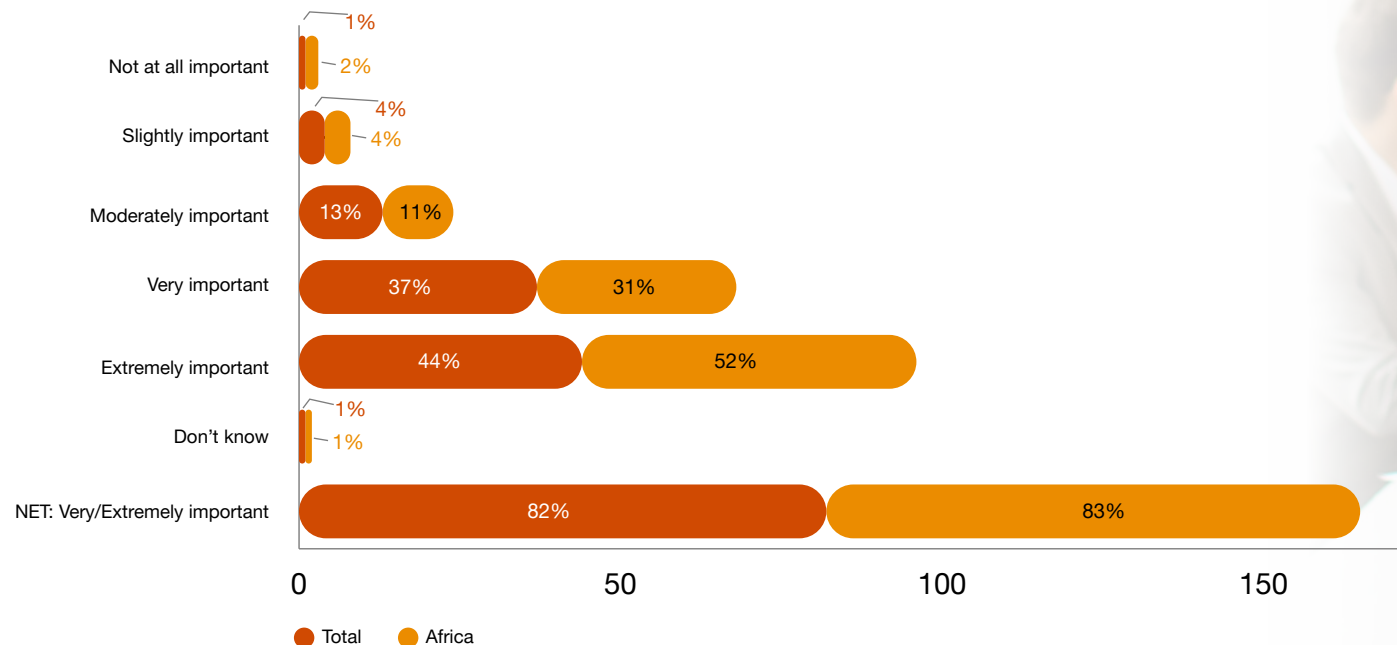
A gap exists between employee priorities and workplace realities. Traditionally, top employer offerings are centred on remuneration:

- Competitive salaries
- Bonuses
- Shares
- Generous leave balances

These remain top employee preferences, with **83%** reporting fair pay as extremely important, especially given rising living costs and high interest rates.

However, only **72%** of those who rate fair pay as extremely important agree that their current job provides it, revealing a significant gap between employee expectations and actual workplace conditions.

How important is it to you that your job is fairly paid?



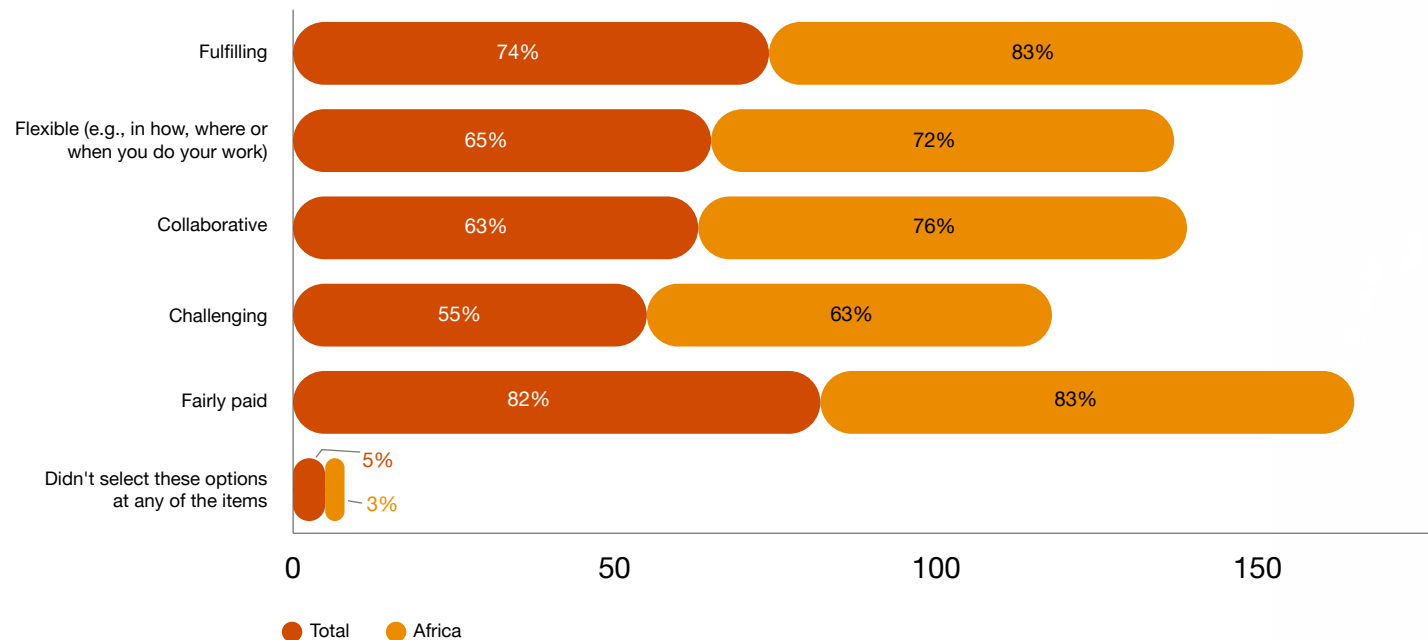
Employees who feel their needs aren't met are likely to be less engaged at work and less receptive to change. Pay is particularly crucial. Companies must strive to provide competitive, livable wages. This is underscored by our research that shows how economic stress negatively impacts employees' emotional and physical wellbeing and reduces productivity and engagement.

What really matters to employees in a personalised age of employment

In a personalised age of employment, employees continue to scrutinise how well their organisation is looking after the workforce and doing the right thing by society at large—especially in uncertain times.

PwC's Global Workforce Hopes and Fears Survey 2023 demonstrated that people want to work for employers that show they care. They also want the organisations they work for to live up to their purpose, values and culture. In this year's survey, employees reported that a sense of fulfilment (83%), flexibility (72%) and collaborative working environments (76%) are also top priorities that they highly value.

How important is it to you that your job is fairly paid?



Flexibility helps employees better maintain their work-life balance, which helps them to be motivated and focused at work and to have the energy and mental clarity to perform their jobs well. However, more companies are asking employees to return to the office because they consider workers more productive and engaged in the office. The return-to-the-office shift presents a challenge to the idea of flexibility for employers and employees.

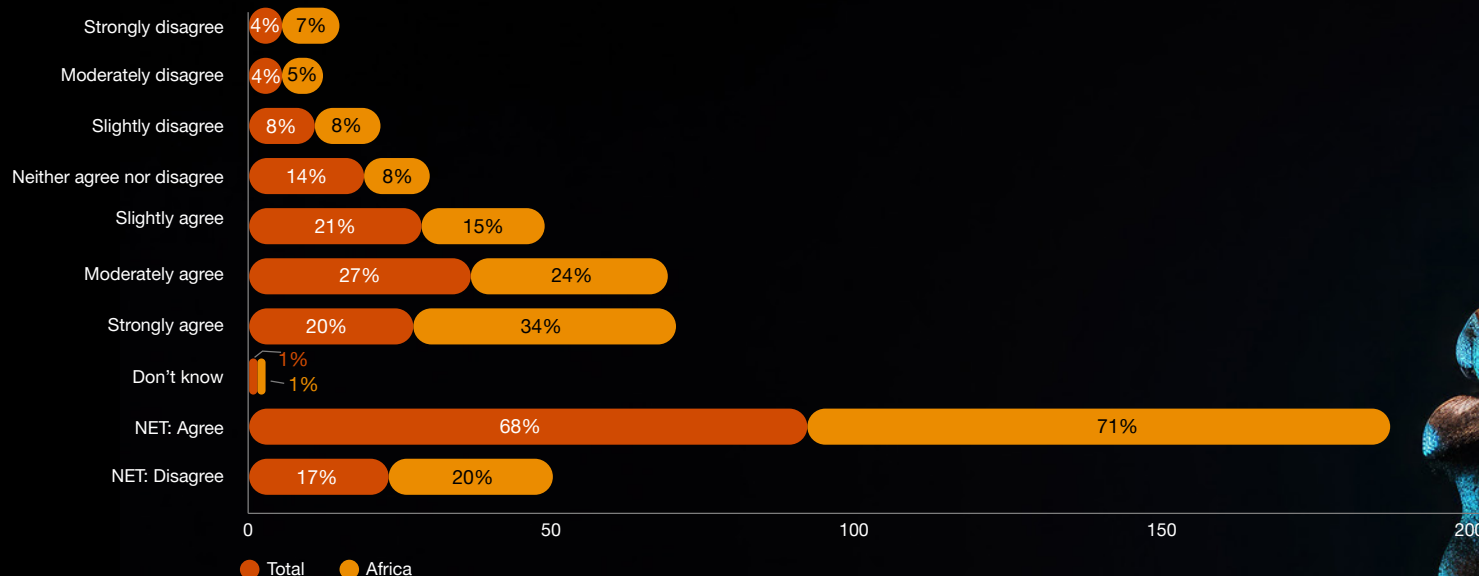
A personalised People Value Proposition sets employees up to experience factors which significantly influence sustained engagement and motivation at work: conducive learning, psychological safety, a sense of individuality and shared community. When employers try to meet employee needs, employees will try to meet employer needs.

The data suggests that employers need to rethink the concept of the traditional employee to attract and retain the skills and talent needed for organisations to succeed in the evolving world of work. Employers need to provide an exceptional life experience with purpose at heart and treat their workers as people, taking into account everyone that matters.

Concluding remarks on leadership sentiments

Leaders should amplify good behaviour as the workforce share positive sentiments about leadership across Africa in the workplace.

To what extent do you agree or disagree with each of the following statements about your organisation's most senior leaders (e.g., CEO, CFO, owner)?



Leaders must remain vigilant, as they are expected to inspire, motivate and guide the workforce through change and disruption. Leadership is a collective effort, requiring leaders to:

1. Rally around a common purpose
2. Support each other and prioritise wellbeing
3. Present a unified front in embracing change

The future demands a new leadership paradigm

Leaders and workers must collaboratively embrace and drive change to thrive in the future world of work. This may necessitate more adaptive and transformative leadership styles.

In summary, employers should reflect on and answer the following key questions:

- What opportunities do we have to co-create and socialise a collective future-fit strategy?
- How can we empower our people to embrace and flourish through chaos?
- How can we shift our culture to one that attracts and retains key talent?
- Where are there opportunities to embed more effective ways of working?
- How can our formal leaders show up and role model the right behaviours that will make a lasting impact?

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