



普华永道



Hopes and fears 2021

Mainland China Report



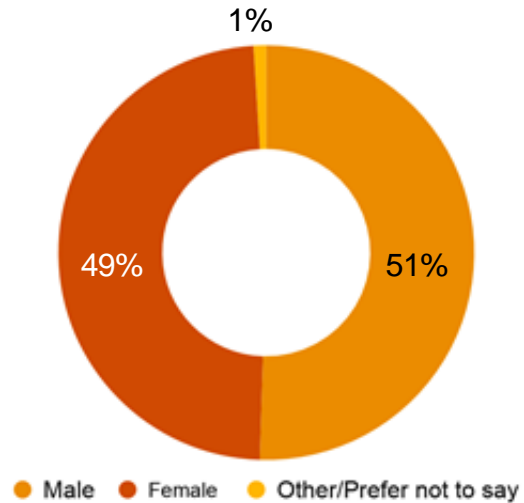
# Hopes & Fears 2021: Global Data

PwC commissioned a survey of **32,517** members of the general public (26 January to 8 February 2021)

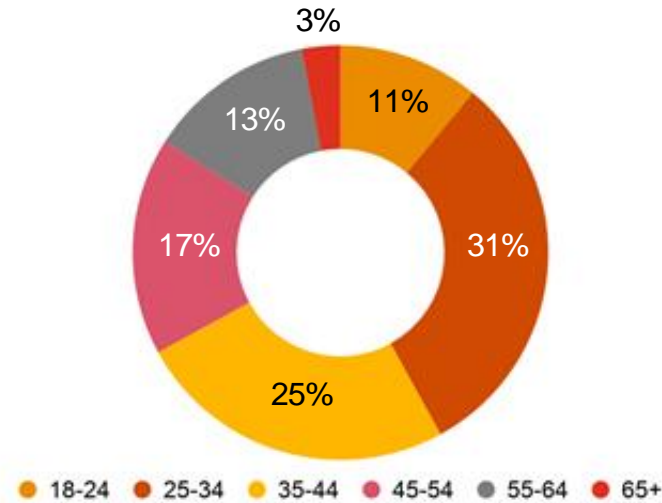
Respondents included workers, business owners, contract workers, students, unemployed people looking for work, and those on furlough or who were temporarily laid off.

The survey polled workers in **19 countries**: Australia, Canada, China (including Hong Kong SAR), France, Germany, India, Japan, Kuwait, Malaysia, Netherlands, Poland, Qatar, Saudi Arabia, Singapore, South Africa, Spain, UAE, UK, and the US.

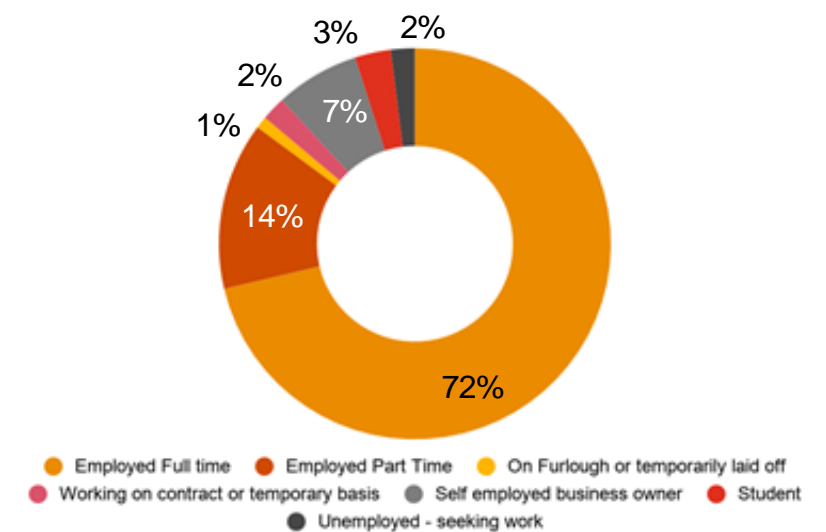
By gender



By age



By working status

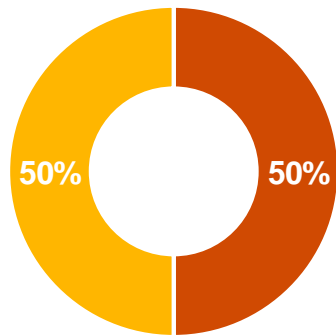


Note: Some figures do not add up to 100% due to rounding

# Hopes & Fears 2021: Chinese Data

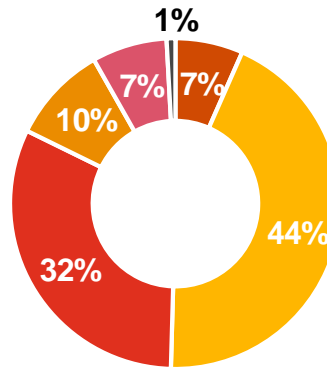
Among the global data 1,511 members are from Mainland China, covering different gender, age and working status.

By gender



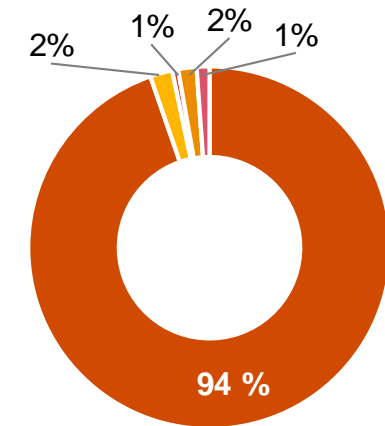
■ Male ■ Female

By age



■ 18-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55-64 ■ 65+

By working status



■ Employed - full time ■ Employed - part time  
■ Working on a contract or temporary basis ■ Self-employed business owner  
■ Student

Note: Some figures do not add up to 100% due to rounding

# Key findings

## More positive than negative about the future world of work

About half globally and over 70% people in Mainland China take positive outlook to the future world of work.

**73%**

feel positive in Mainland China- either excited or confident - about the future world of work and what it means for them, compared to 50% globally.

## People are concerned about job security

Most people globally and in Mainland China worry about negative impact brought by automation, such as job risks and potential obstacles. They even ask government to take actions.

**51%**

are worried that automation is putting many people's jobs at risk globally. And concerns and worries also prevails in Mainland China.

## Remote and hybrid working is in demand

A remarkably low percentage of people who find that they can work remotely want to go back to the office full time.

**56%**

Of workers prefer mostly virtual way and perform remotely when describing their future ideal work environment in Mainland China.

# Key findings

## Discrimination and lack of support are holding people back

About half globally and in Mainland China think their potential is not fully unleashed due to discrimination and lack of support at work.

**55%**

In Mainland China and **50%** globally have been **discriminated against** at work.

## People want to work for purpose ...but not at any price

Most people globally and in Mainland China care about social impacts...but personal income is still the major concern.

**87%**

In Mainland China and **75%** globally want to work for an organisation with 'positive contribution to society'. But **56%** in Mainland China (globally **54%**) consider income as the most important factor of a job.

## Monitor and interference seems to be accepted by more people

The somehow surprising trend can be seen both in Mainland China and globally, but Chinese workers are willing to give more.

**47%**

In Mainland China and **44%** globally could accept performance monitor. And a surprisingly high percentage (**59%**) of Chinese workers could consider **treatments** to improve performance at work.

# Key findings

**Chinese people have higher willingness and better opportunities to learn, but still lack resources.**

Chinese people are making better use of existing learning resources, but technology access and financial resources are still a major obstacle.

**89%**

In Mainland China and **74%** continually learn new skills to keep up with changing technology. But **85%** (**55%** globally) lack technology access and **37%** (**46%** globally) are unable to fund themselves.

**Chinese people rely more on institutions other than themselves to develop.**

Chinese people expect employers and government to play more important role in development than individuals.

**55%**

In Mainland China and **65%** globally think individuals are most responsible for development, and Chinese people expect more support from government (**66% in Mainland China VS 50% globally**) and labour union (**43% in Mainland China vs 28% globally**).



A mostly optimistic outlook about  
future world of work

# Globally, more positive than negative about the future world of work

50%

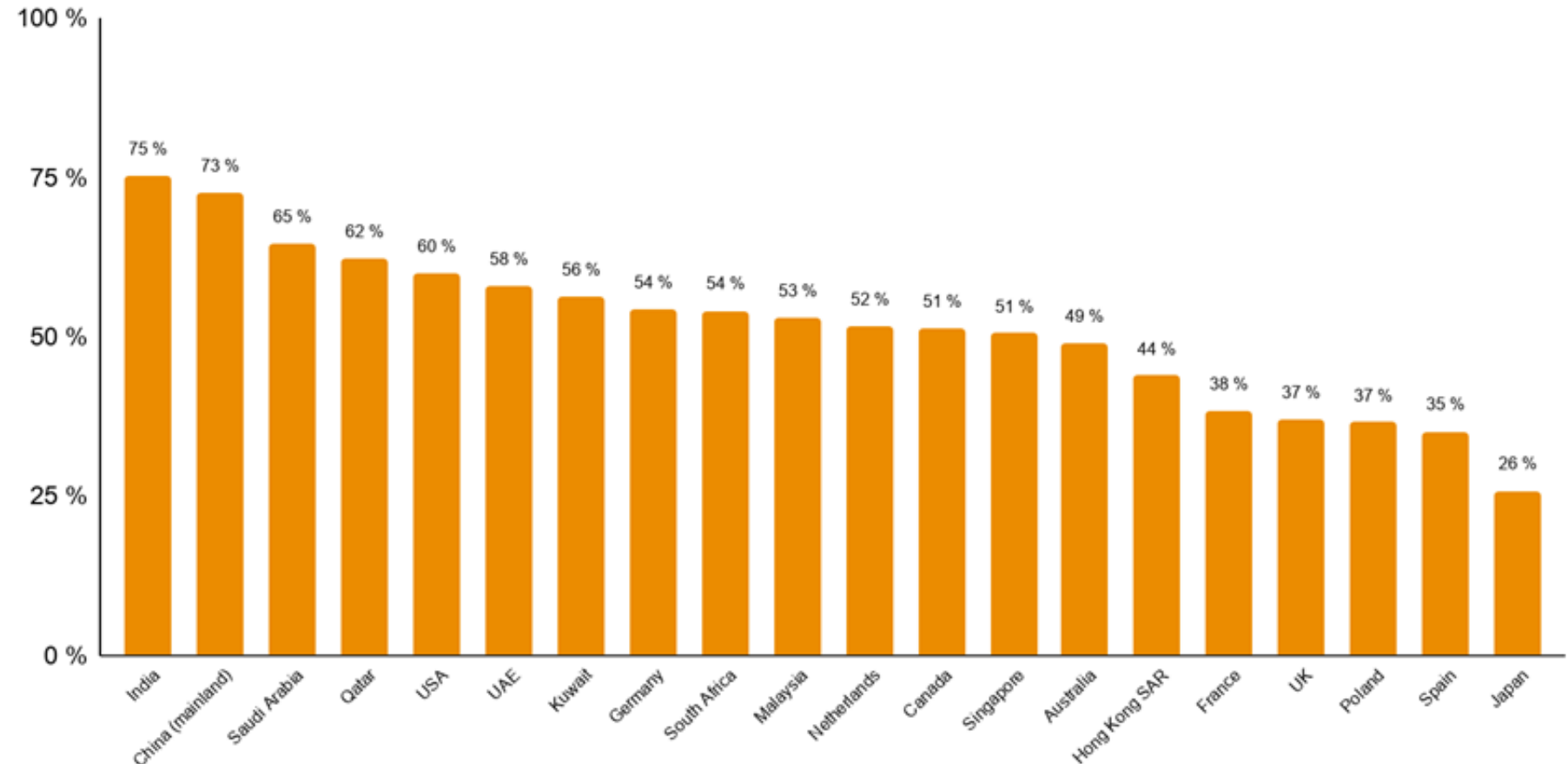
feel **positive** - either Excited (23%) or Confident (27%) - about the future world of work and what it means for them.

35%

**worry** about what the future holds.

A further **15%** prefer not to think about the future.

When you think about the future world of work as it is likely to affect you, which option best describes how you feel? (those who are positive - either 'Excited' or 'Confident')

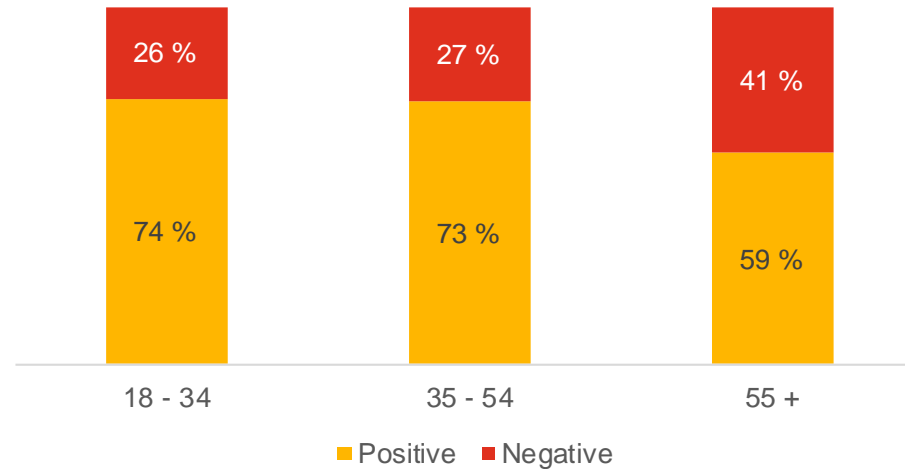




# In Mainland China, positive outlook varies by age and territories

## 73+%

among 18-54 years old tend to hold more positive outlook towards future world of work as it is likely to affect them.

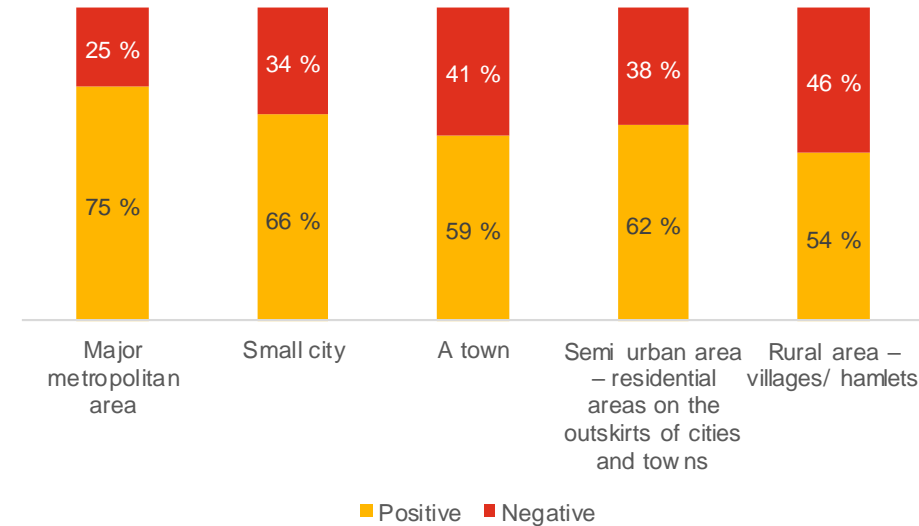


## 59%

above 55 years old would think of future work positively.

## 75%

citizens of major metropolitan areas either excited or confident about the future world of work and what it means for them.



## 54%

from rural areas/villages/hamlets feel excited or confident when they describe the future world of work.

# Globally, people are still positive about technology

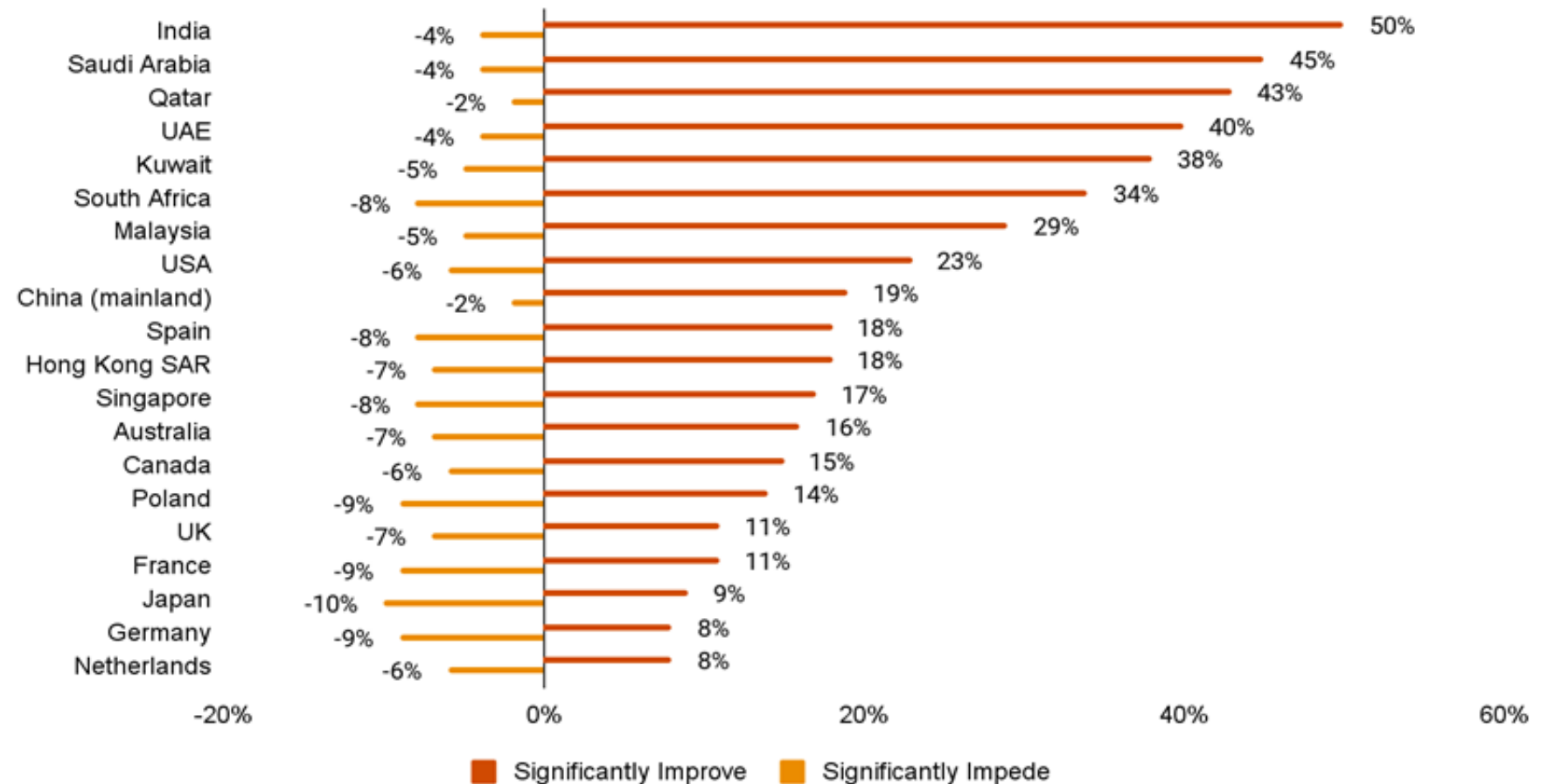
64%

believe that technology provides **more opportunities than risks** (with just 9% disagreeing).

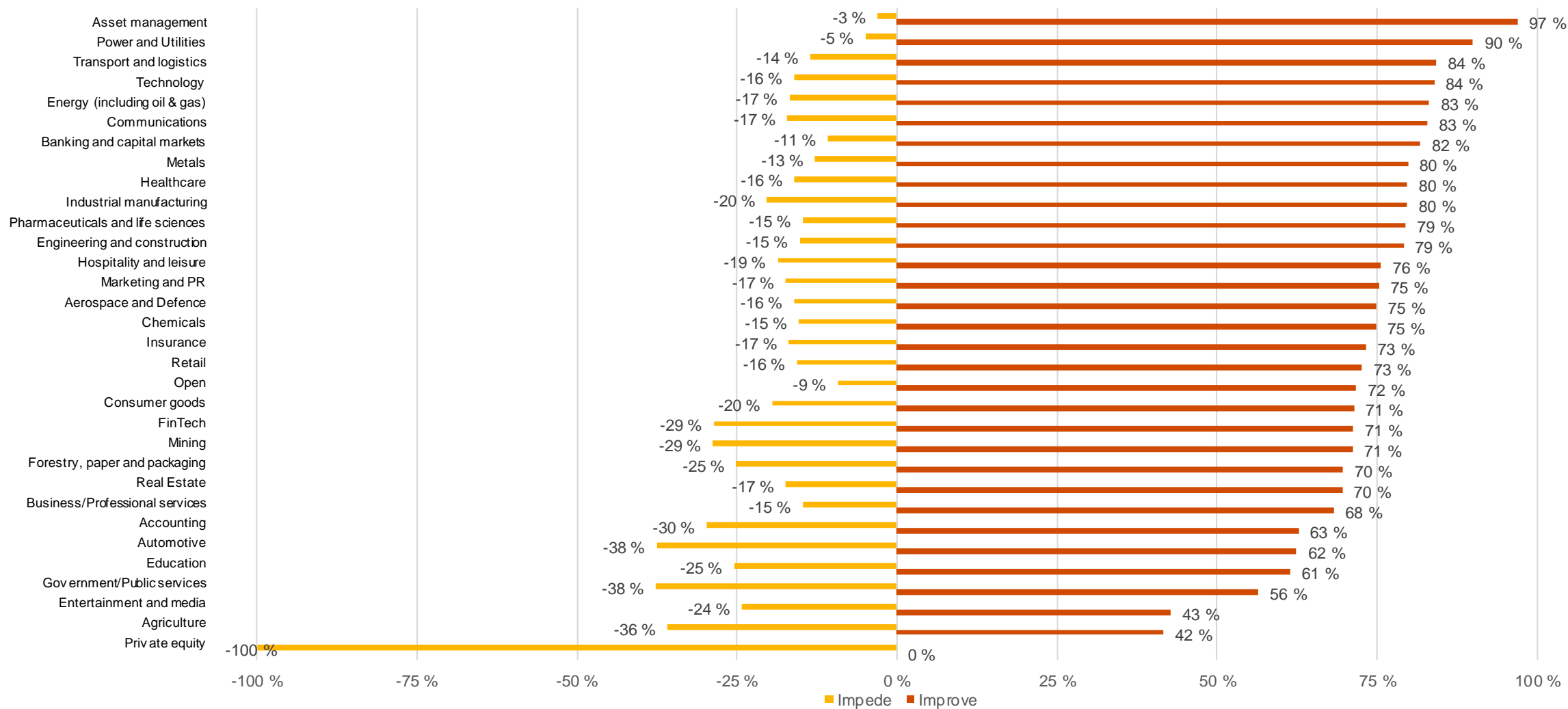
59%

feel that technology will **improve their job prospects** in the future - **21%** think it will significantly improve them.

Do you think that technological developments will improve or impede your job prospects in the future?



# Mainland China data show slight difference about the impact of technology on future jobs across different sectors

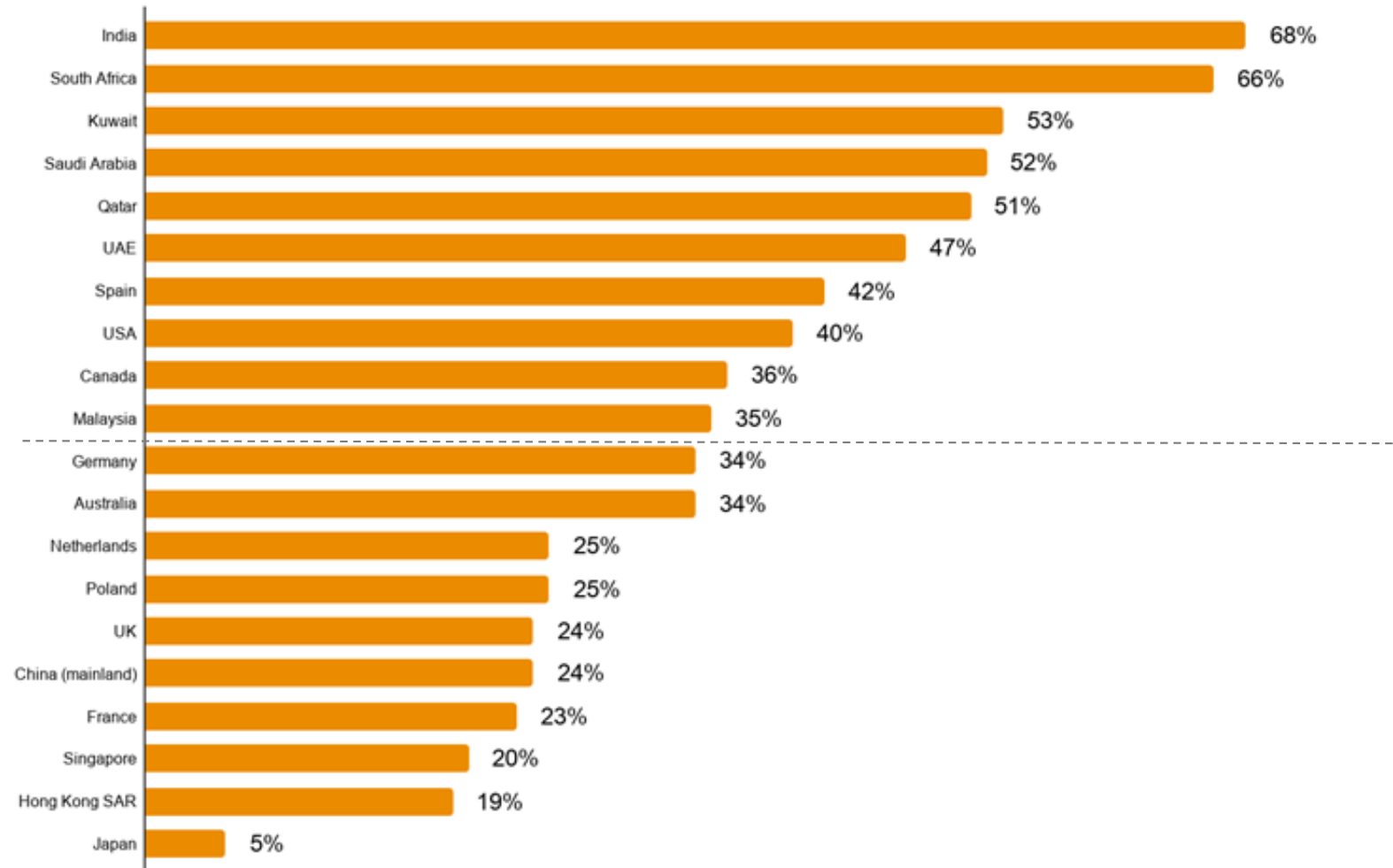


# Globally, people are confident about mastering new technology at work

How confident do you feel that you can adapt to using new technologies entering your workplace?  
(Those who are “very confident”)

# 80%

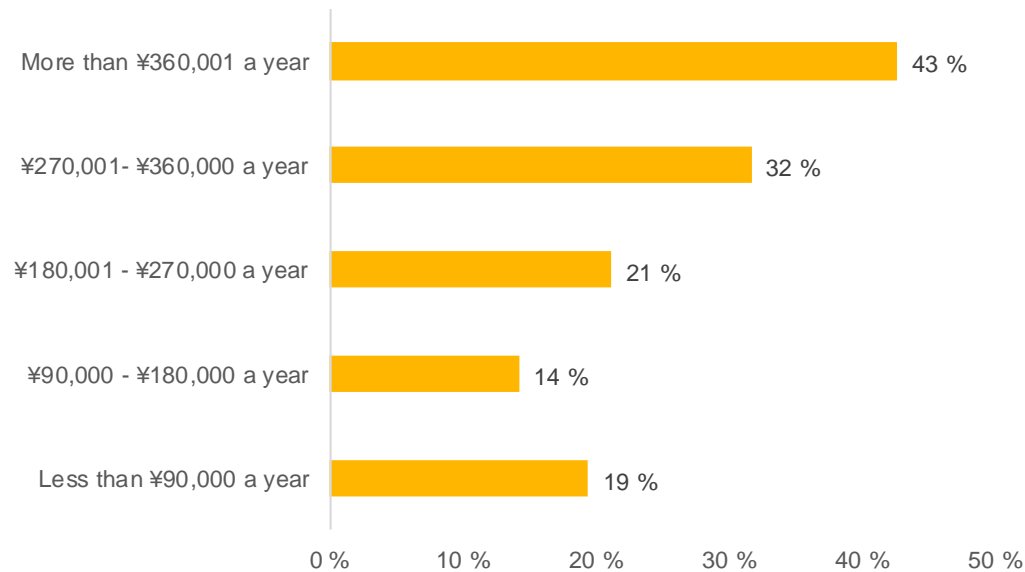
are confident they can adapt to new technology entering their workplace - 35% are very confident).



# Interestingly, people in Mainland China with higher income and from larger organisation are more confident about mastering new technology

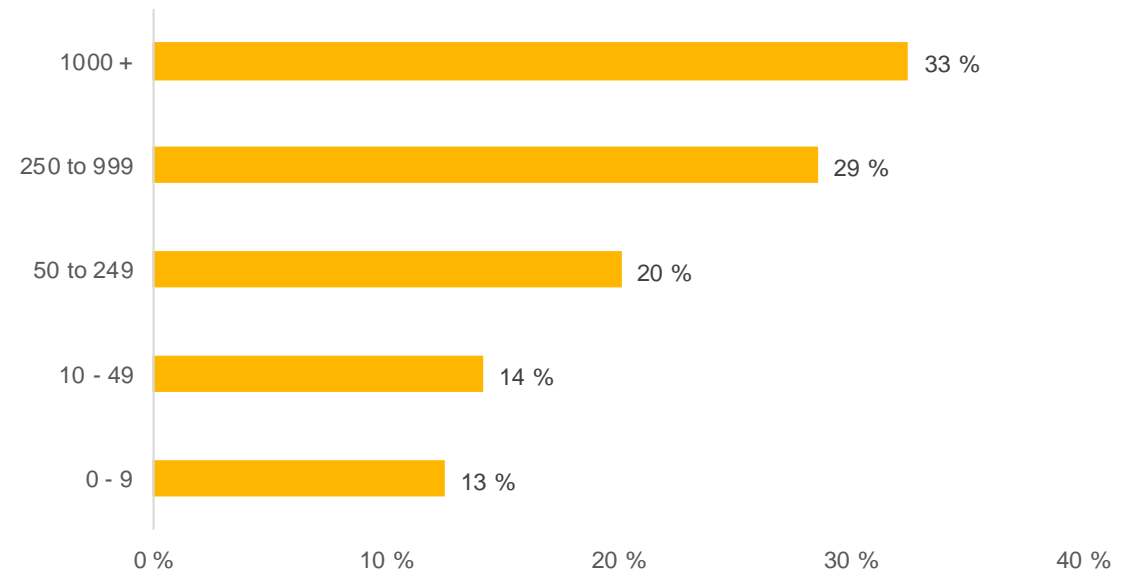
43%

of respondents with more than ¥360,001 as annual household income are very confident that they can adapt to new technology at work.



33%

of respondents from organisations over 1000 people are very confident about mastering new technology at work.



The background is split into two vertical sections. The left section is a solid pink color. The right section is a solid orange color with a pattern of light orange geometric shapes, including squares, rectangles, and a plus sign, some of which have diagonal stripes.

People are concerned about job  
security

# In a global range, there's a real need to open up a genuine, fully-inclusive conversation about jobs

60%

are worried that automation is putting **many people's jobs** at risk.

45%

of people are worried that automation will impact the **jobs of people just like them.**

39%

think that advances in technology might mean **their job will be made obsolete** in the next 5 years.

56%

think that '**few people will have stable, long-term employment in the future**'. This jumps to 81% in India.

48%

think '**Traditional employment won't be around in the future**' - 21% disagreed.

# Similar concerns and worries also prevail in Mainland China

51%

are worried that automation is putting **many people's jobs** at risk.

41%

of people are worried that automation will impact the **jobs of people just like them**.

50%

think that advances in technology might mean **their job will be made obsolete** in the next 5 years.

46%

think that **'few people will have stable, long-term employment in the future'**.

48%

think **'Traditional employment won't be around in the future'** - 18% disagreed.

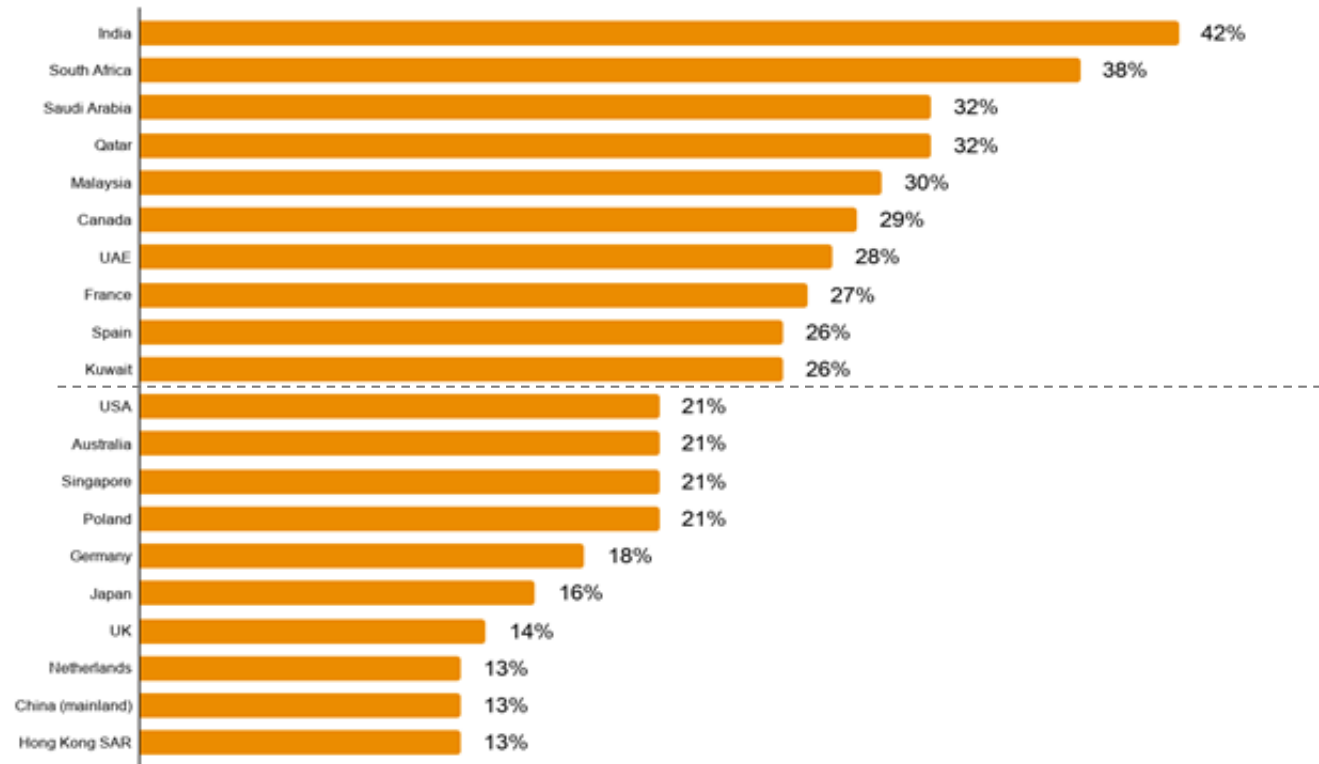


# People say their government should take action to protect jobs

61%

A clear majority say that **governments should take any action needed** to protect jobs from automation - **23%** strongly agree.

To what extent do you agree or disagree: 'Governments should take any action needed to protect jobs from automation' (those who 'Strongly agree')





Remote and hybrid working is in demand

# Globally, remote and hybrid working is in demand

72%

prefer a mix of in-person and remote working.

9%

of those whose jobs allow for them to work remotely would choose a **traditional face to face work environment full time.**

19%

Nearly a fifth would be happy to not return to an office at all and **work entirely remotely.**

52%

said, if forced to choose, that they prefer stability ('Job security and long term service with an organisation') over autonomy ('To be in control of my work, what I do and when i do it').

# More possibilities from remote work in global range

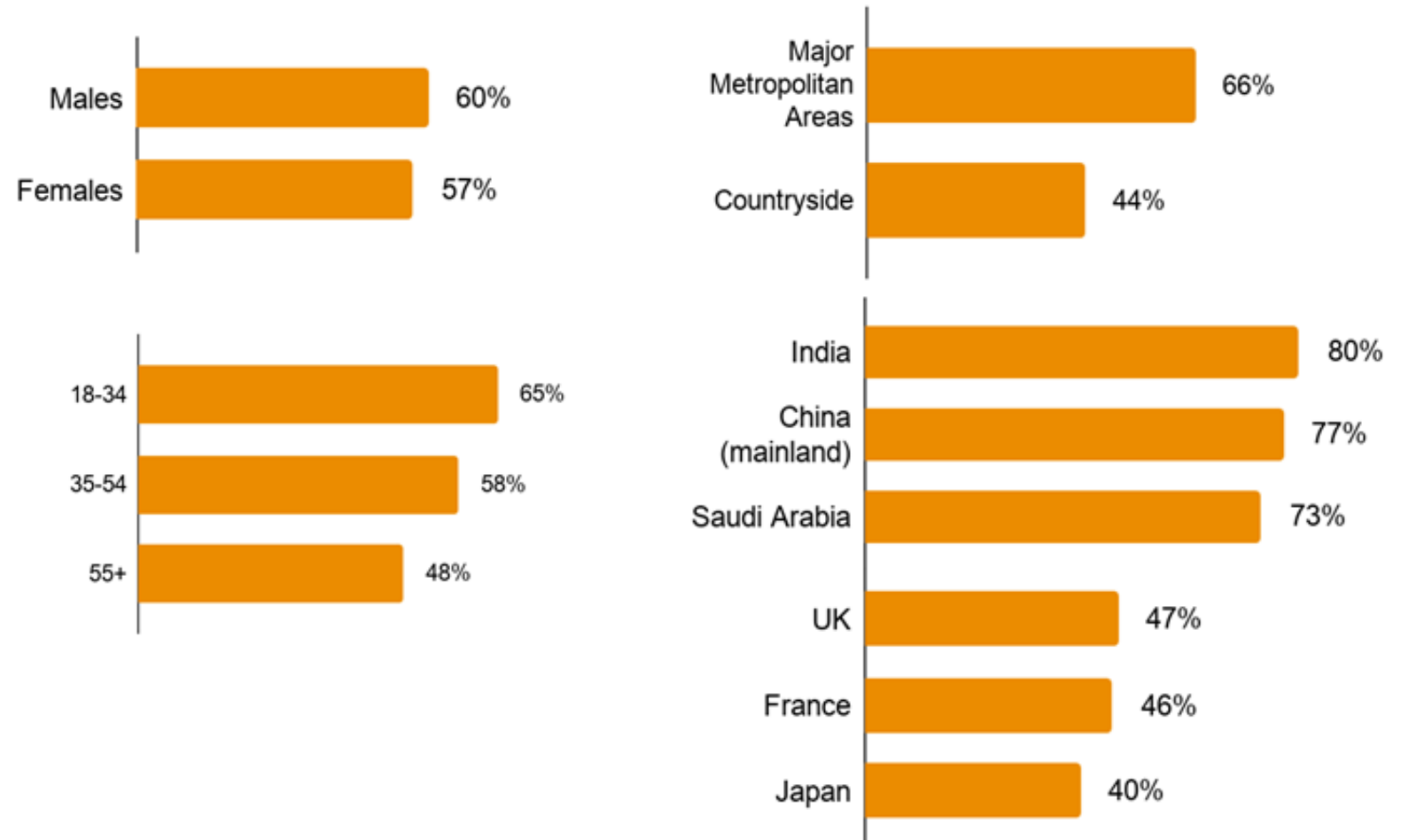
45%

of workers **worked remotely** (for at least some of the time) **during the pandemic.**

59%

say there are **elements of their current job that they could perform remotely** (including by using advanced technology).

Thinking about your current job, are there any **elements of your work that you would be able to perform remotely** (e.g. at home) by using advanced technology?

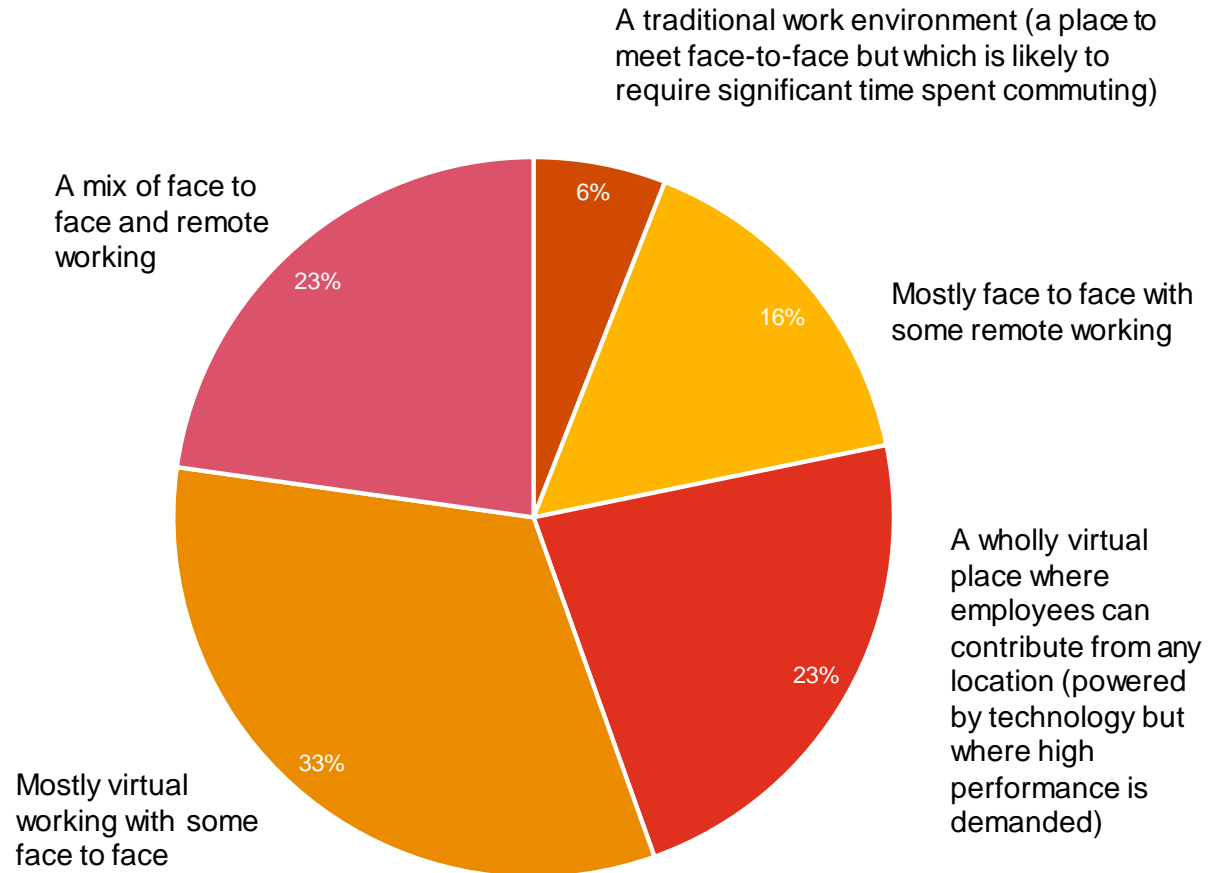


# In Mainland China, wholly or mostly virtual working is preferred

In the future, what would your ideal work environment look like?

# 56%

of workers prefer wholly or mostly virtual way and perform remotely when describing their future ideal work environment.



# As a sharp contrast to global, Chinese people prefer autonomy over stability

60%

said, if forced to choose, that they prefer autonomy ('To be in control of my work, what I do and when I do it') over stability ('Job security and long term service with an organisation').

Thinking about your career to date and your future career, which of the following factors is most important to you?

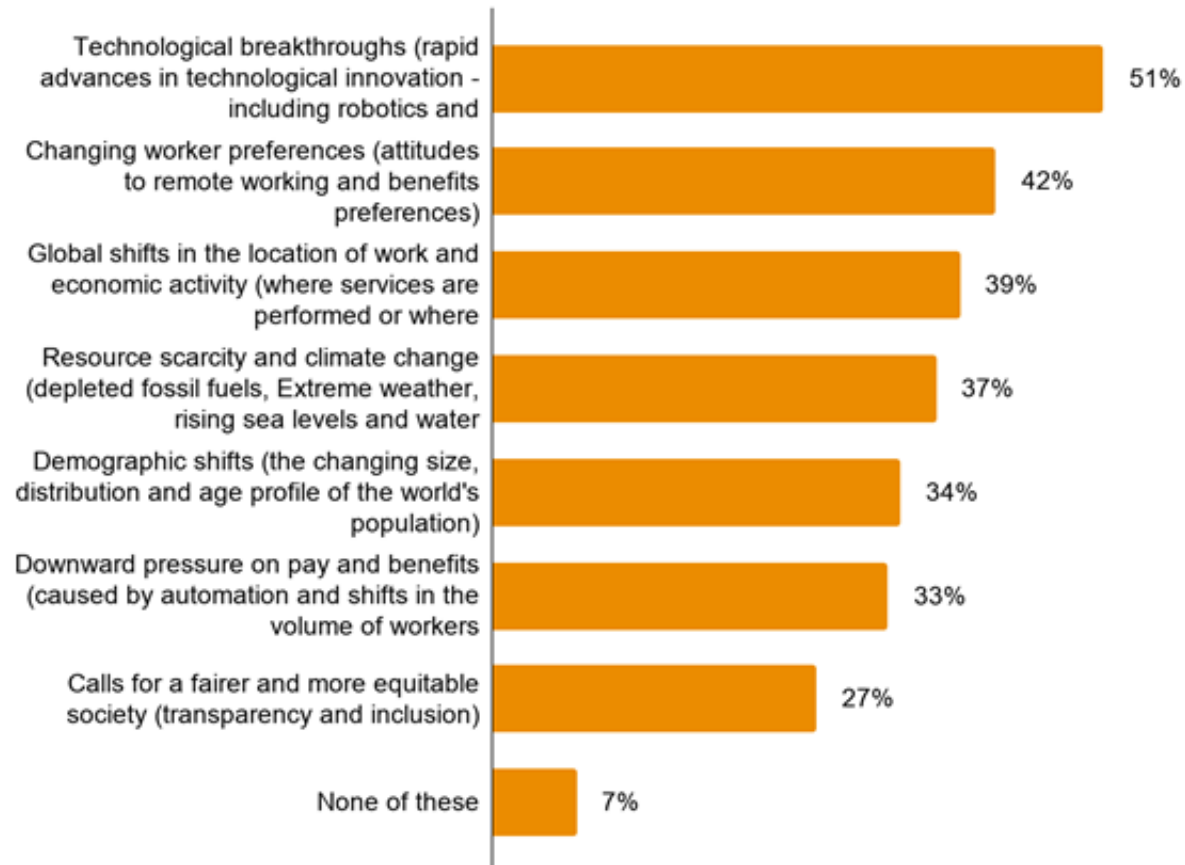


# And work won't go back to the way it was globally

42%

think that changing worker preferences (eg attitudes to remote working, benefits preferences, etc) will drive transformation in the way people work over the next 3-5 years.

Which, if any, of the following global trends do you believe will transform the way people work over the next 3-5 years? Select all that apply.

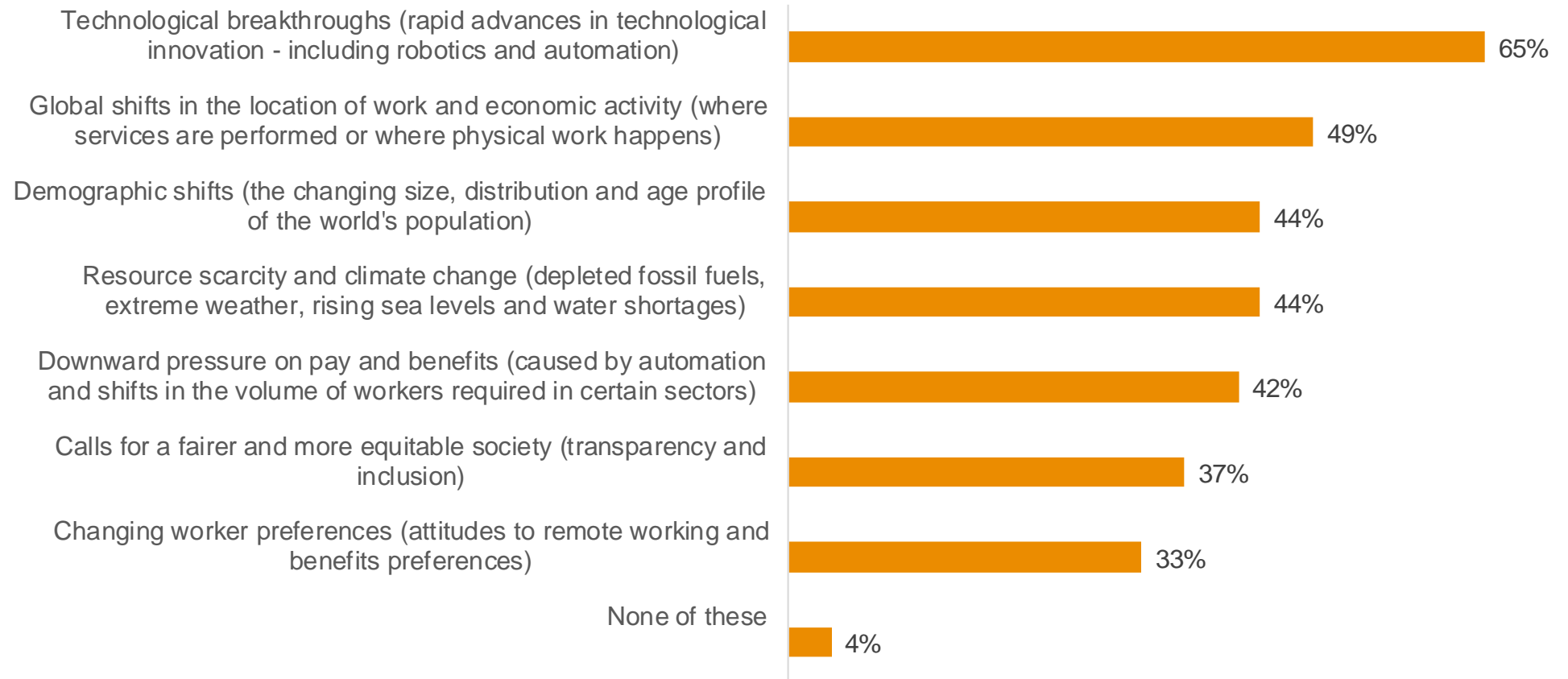


# This opinion has even been further echoed in Mainland China

Which, if any, of the following global trends do you believe will transform the way people work over the next 3-5 years? Select all that apply.

# 49%

think that global shifts in the location of work and economic activity (where services are performed or where physical work happens).





The background is split into two main color sections: a solid pink section on the left and an orange section on the right. The orange section contains a pattern of diagonal lines and plus signs in a lighter shade of orange. A black horizontal bar is positioned across the middle of the image, containing white text.

Discrimination and lack of support  
are holding people back

# Globally, there's a lot more to do to create a workplace that allows everyone to give their best

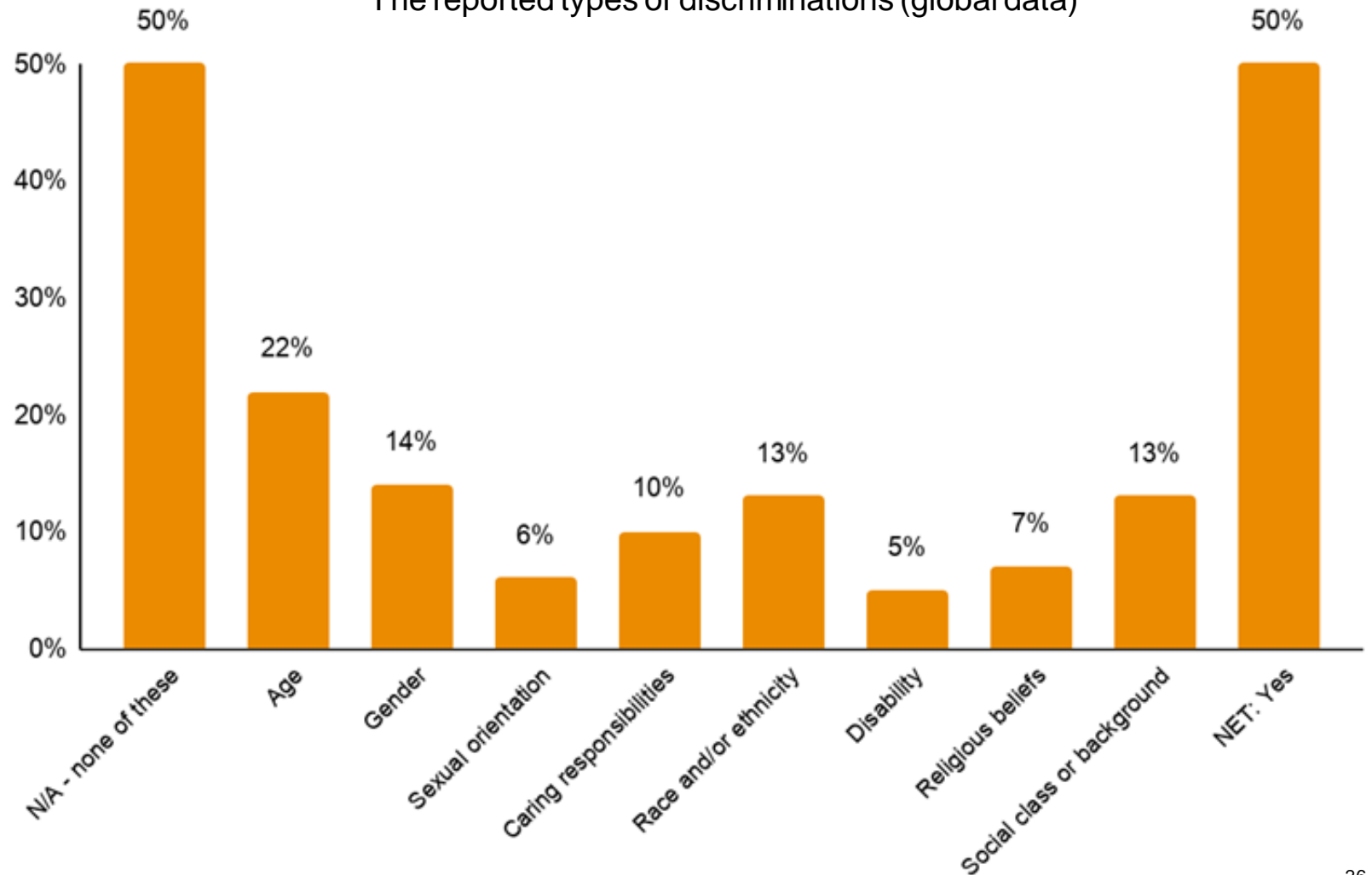
50%

have been **discriminated against** at work meaning they have lost out in career advancement or access to training.

22%

**Age** discrimination was the most reported. This is not limited to older workers with **23%** of those between **18-34** feeling passed over because of their age.

The reported types of discriminations (global data)



# The situation in Mainland China is even more challenging

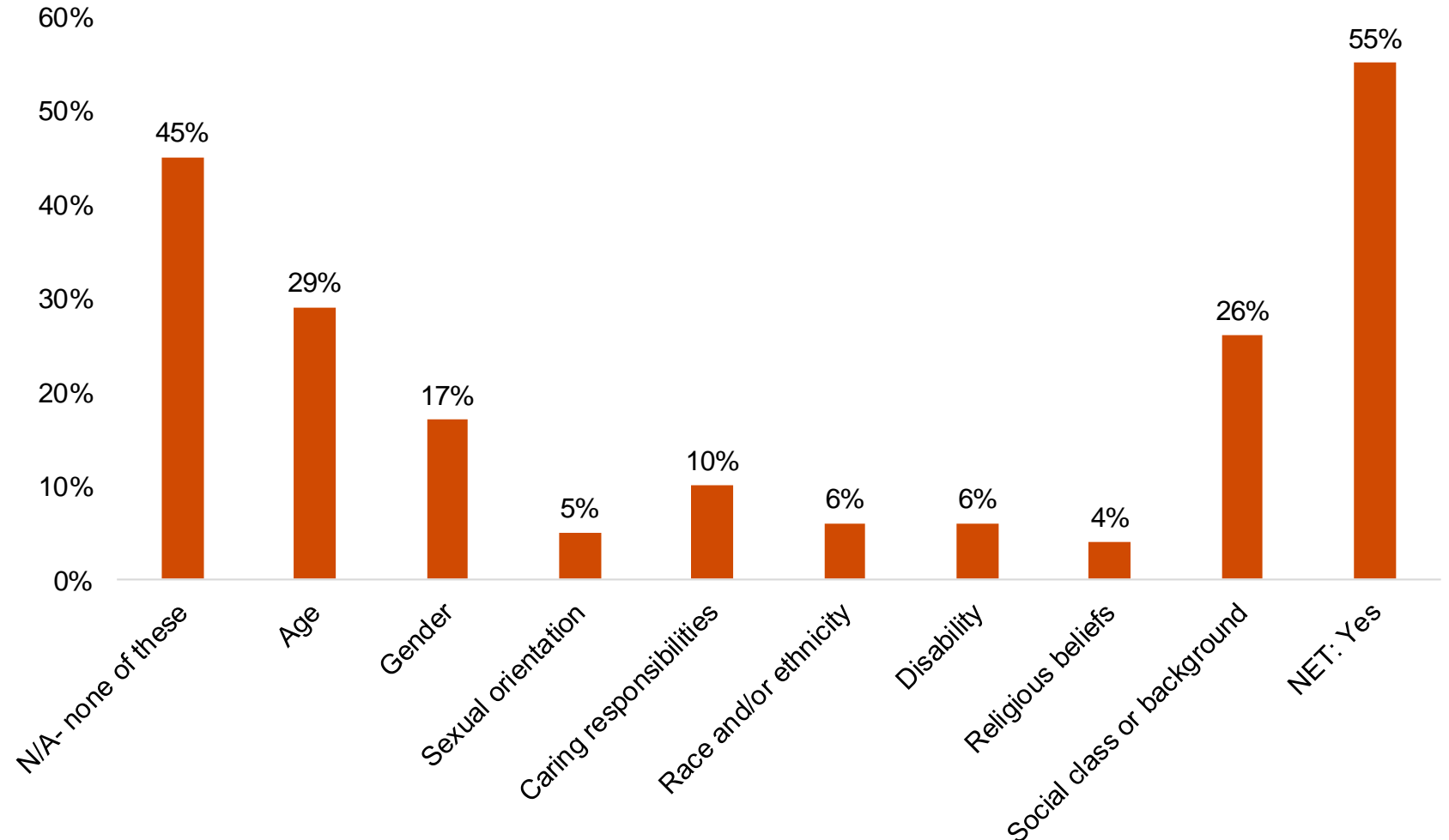
55%

have been **discriminated against** at work, slightly higher than the global data.

29%

**Age** discrimination was the most reported. Different from the global situation, the extend of discrimination increases with age.

The reported types of discriminations (Mainland China data)

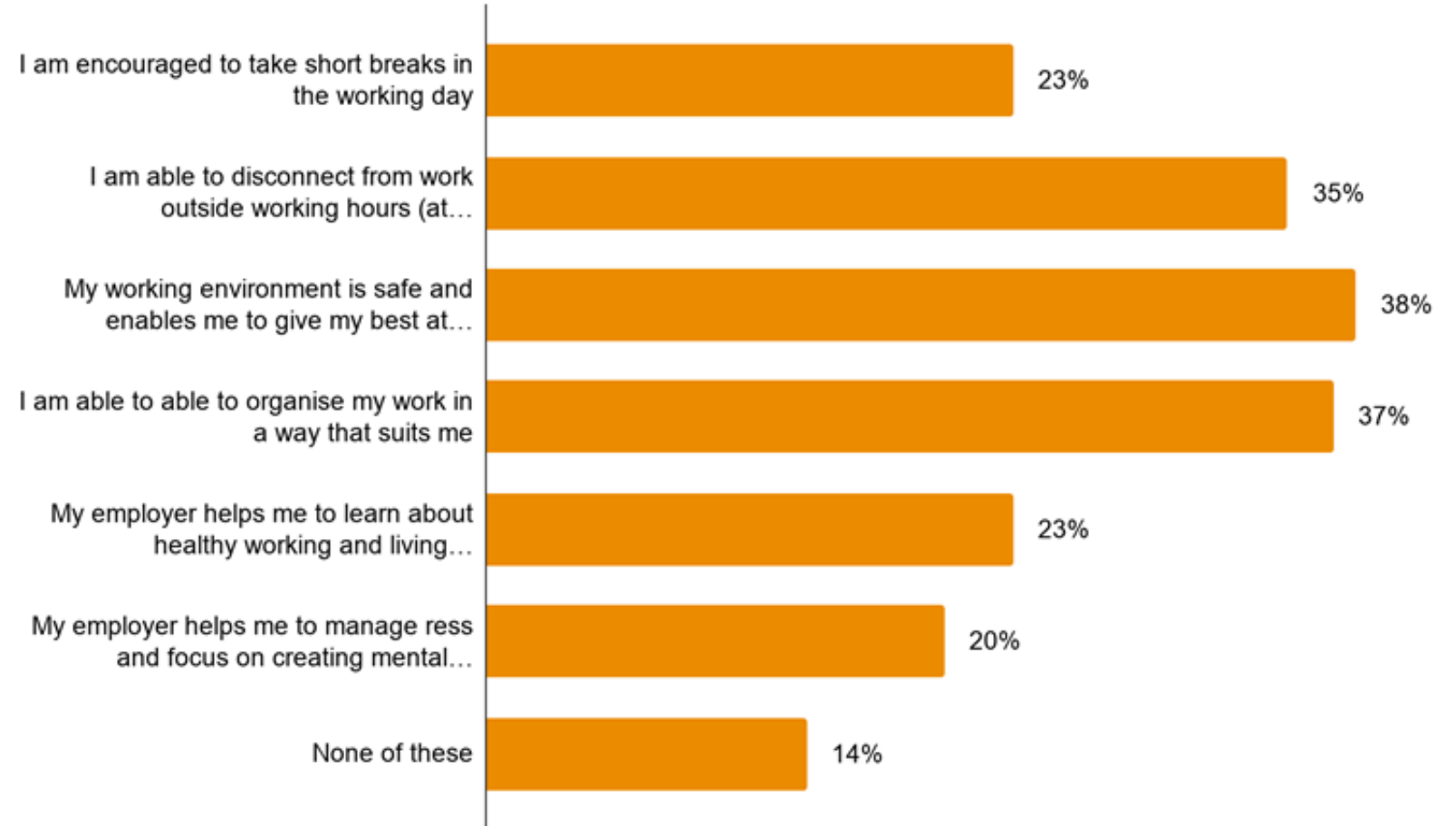


# Globally, workers missing out on support for wellbeing

38%

of respondents feel that their work environment is **safe** and enables them to **give their best**.

Workplace wellbeing (global data)

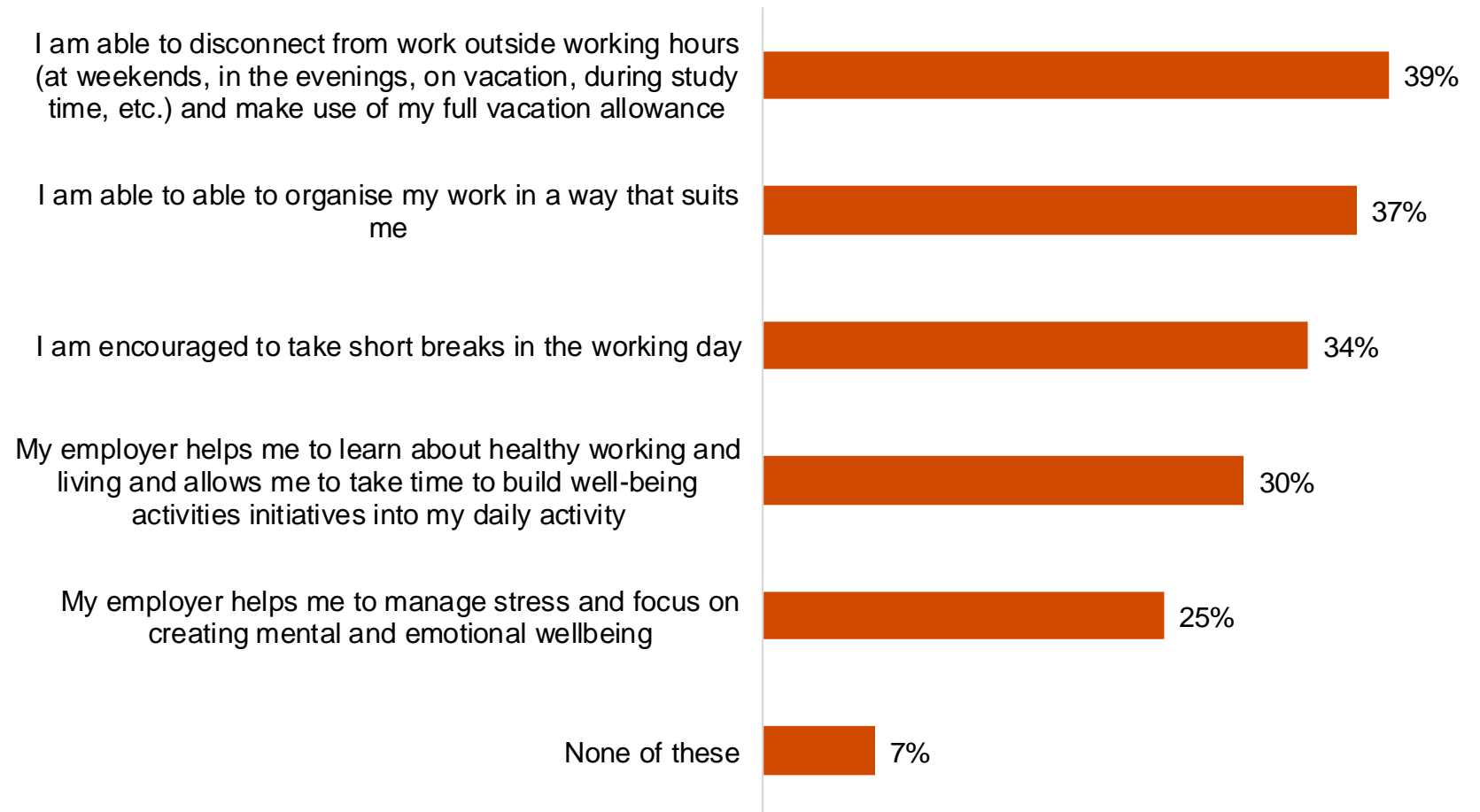


# Mainland China is doing slightly better on providing an enabling working environment, and less than half feel they are fully supported

42%

of respondents feel that their work environment is **safe** and enables them to **give their best**.

Workplace wellbeing (Mainland China data)



The background is split into two main color sections: a solid pink section on the left and a solid orange section on the right. The orange section is decorated with a pattern of light-colored geometric shapes, including squares, rectangles, and a plus sign, all filled with diagonal hatching lines.

# Impact versus income: a difficult choice

# Globally, societal impact is important to people – But not at any price

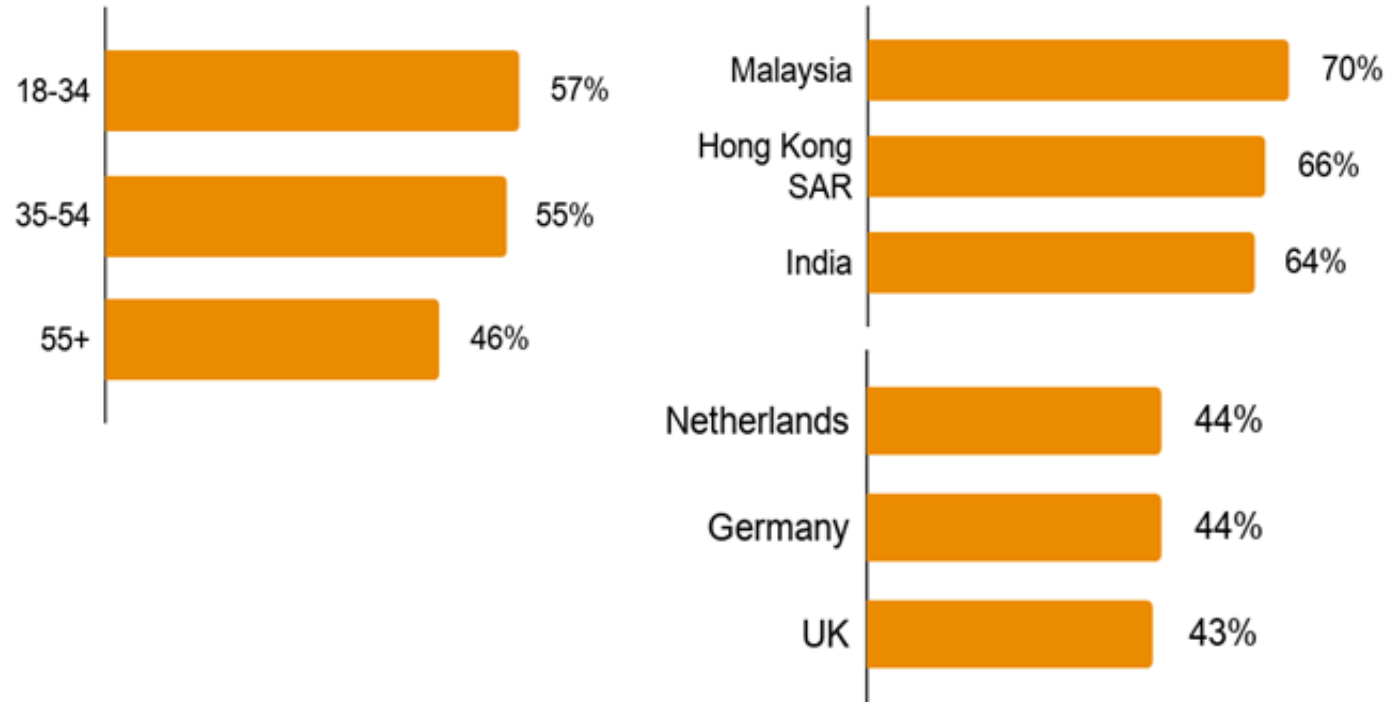
75%

say they want to work for an organisation that will **make a 'positive contribution to society'**.

54%

said, if forced to choose, they would prefer a job that enabled them to 'take every opportunity to **maximise their income**' over one a job that '**makes a difference**' (46%).

Percentage of people seeing '**Taking every opportunity to maximise their income**' as the most important factor of a job (global data)



# In Mainland China, the overall situation is similar, while age and sector turn out to be two outstanding differentiators

87%

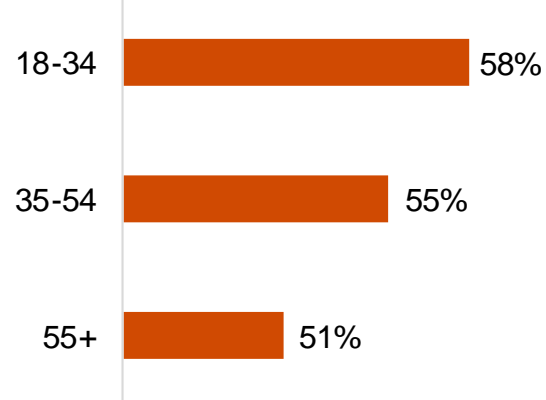
say they want to work for an organisation that will **make a 'positive contribution to society'**.

56%

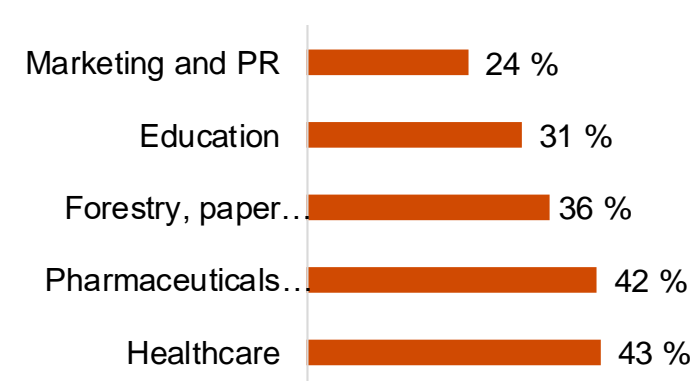
said, if forced to choose, they would prefer a job that enabled them to 'take every opportunity to **maximise their income**' over one a job that '**makes a difference**' (44%).

Percentage of people seeing 'Taking every opportunity to maximise their income' as the most important factor of a job (Mainland China data)

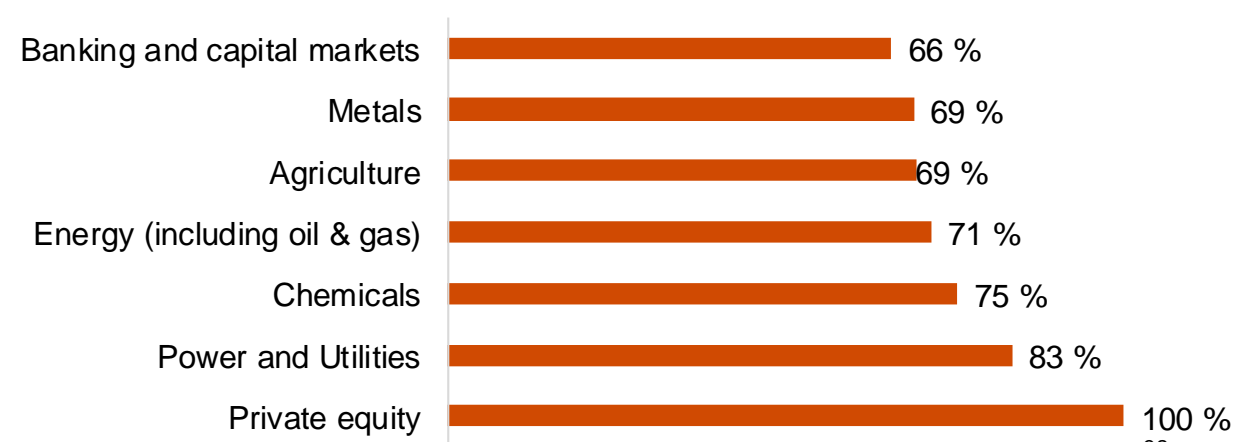
## *Elder people care less about income*



## *Industries care least about income*



## *Industries care most about income*





The background features a vertical split between a solid pink color on the left and an orange color on the right. The orange section is decorated with a pattern of diagonal lines and plus signs in a lighter shade of orange.

Monitor and interference seems to  
be accepted by more people

# Globally, quite a percentage of people are willing to trade liberties for good jobs

## 44%

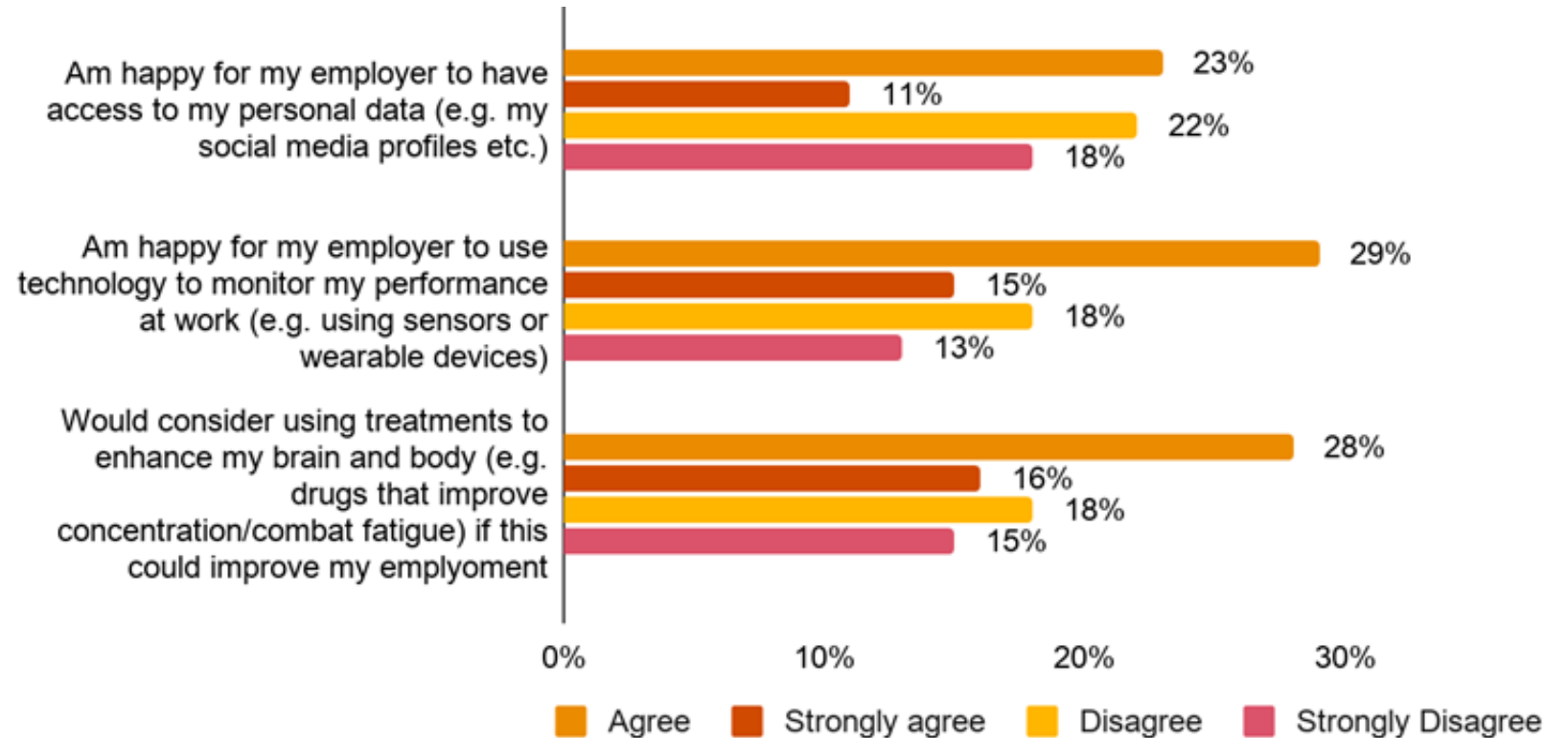
are happy for their employer to use technology to **monitor their performance** at work (including sensors and wearable devices).

However, when it comes to **personal data** just a third of people (**35%**) are willing to give their employer access including **social media** profiles - with 41% unwilling.

## 44%

could consider **treatments** to improve performance at work.

Monitor and interference inside and outside workplace (global data)



# In Mainland China, people are more willing to share personal data and accept performance monitor as well as treatments

## 47%

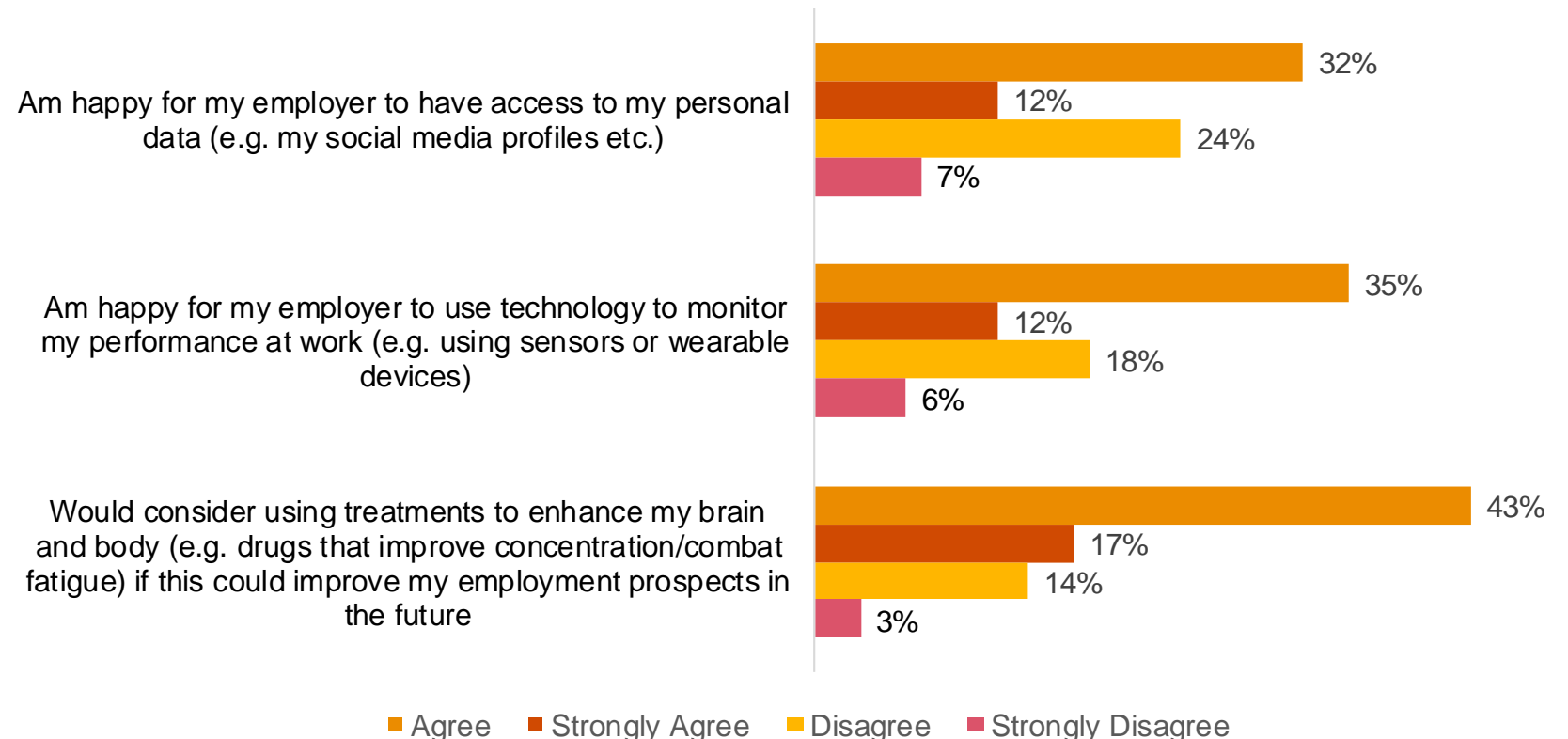
are happy for their employer to use technology to **monitor their performance** at work (including sensors and wearable devices).

**44%** are willing to allow employer to access **personal data**.

## 59%

could consider **treatments** to improve performance at work.

Monitor and interference inside and outside workplace (Mainland China data)



The background is split into two vertical sections. The left section is a solid pink color. The right section is a solid orange color with a pattern of diagonal lines and plus signs. A black horizontal bar is centered across the middle of the image, containing white text.

Various difficulties exist for people  
to gain new skills and knowledge

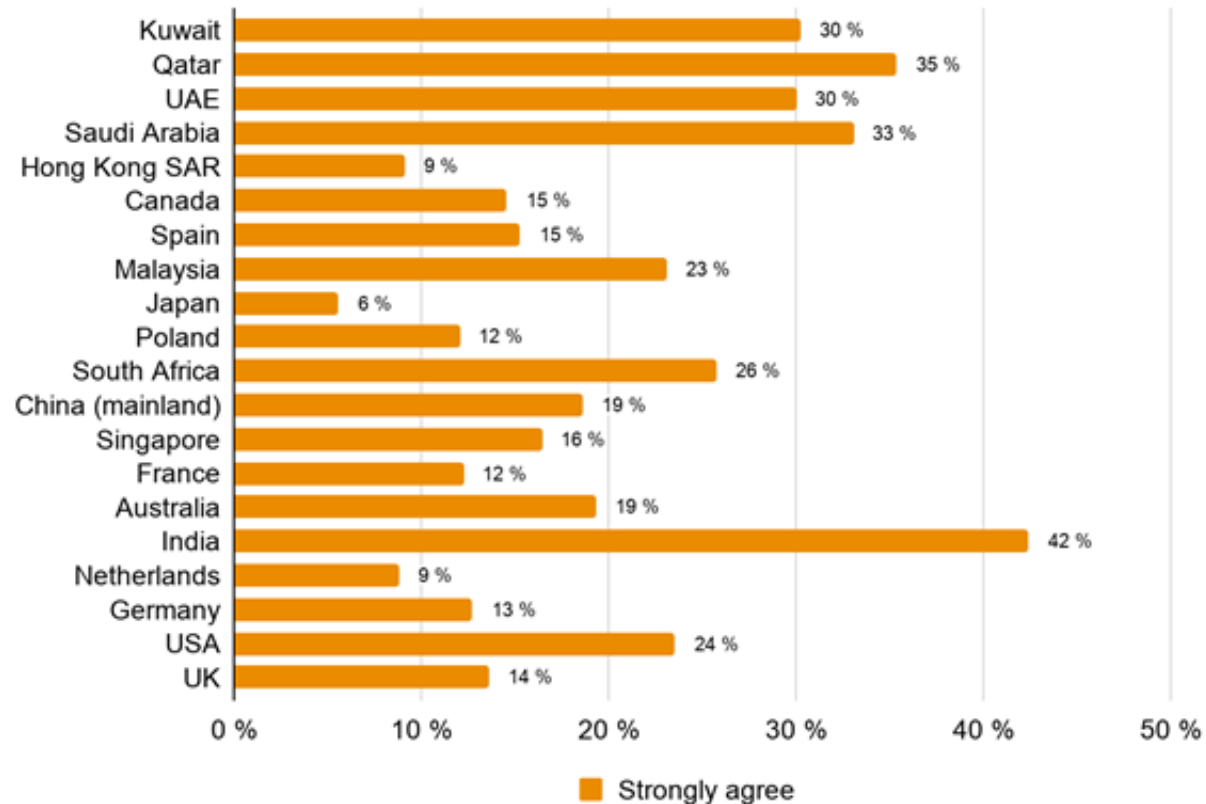
# Globally, STEM skills remain hard to find – But some countries do much better

55%

believe they have **STEM skills** (science, technology, engineering and maths) - **19%** strongly agree.

But there are marked differences between countries surveyed...

Percentage of those strongly agree they have STEM skills (global data)

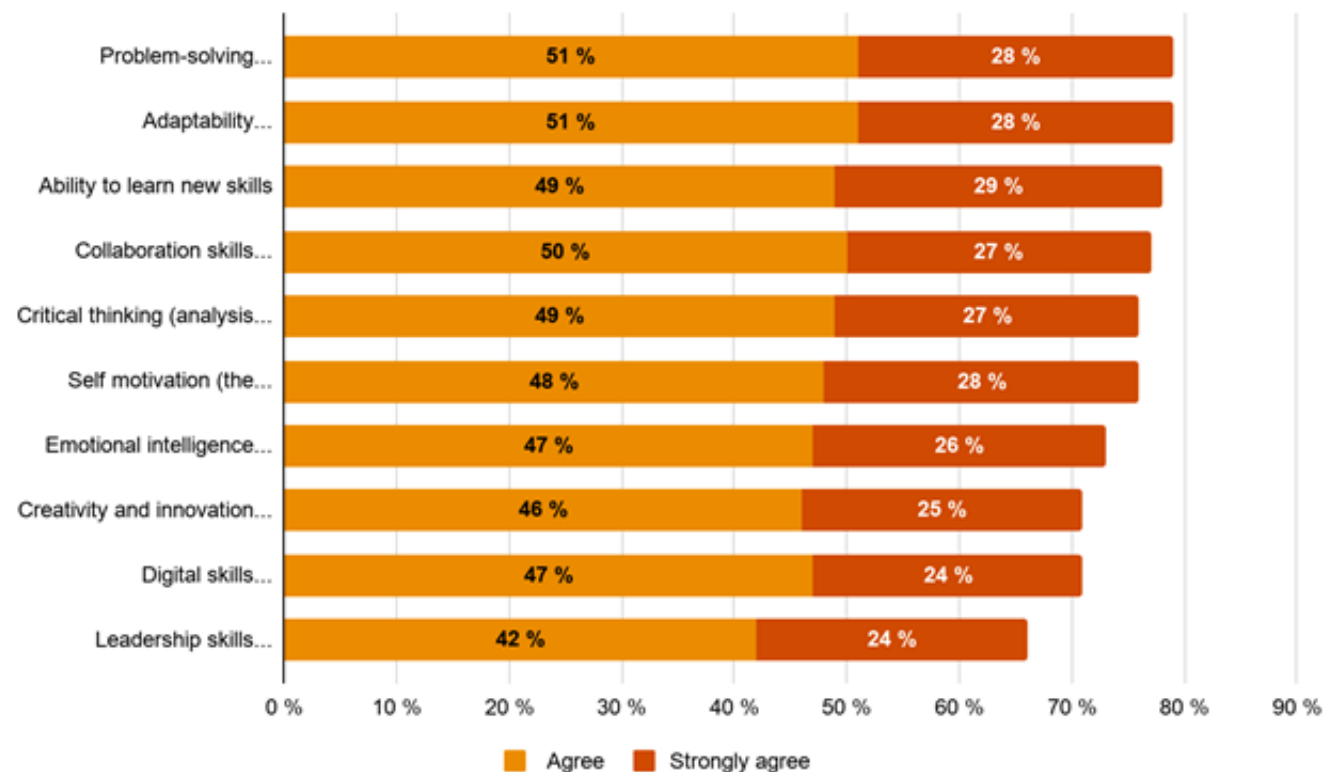


# The mix of digital and transferable skills businesses want... Particularly in major metropolitan areas

The **transferable skills** CEOs are looking for, alongside digital skills most frequently claimed skills are:

- Problem-solving (80%)
- Adaptability (79%)
- Ability to learn new skills quickly (78%)
- Collaboration skills (77%)

Percentage of people claiming different skills (global data)



# In Mainland China, people show less confidence in STEM skills, entrepreneurial ability, leadership and digital skills

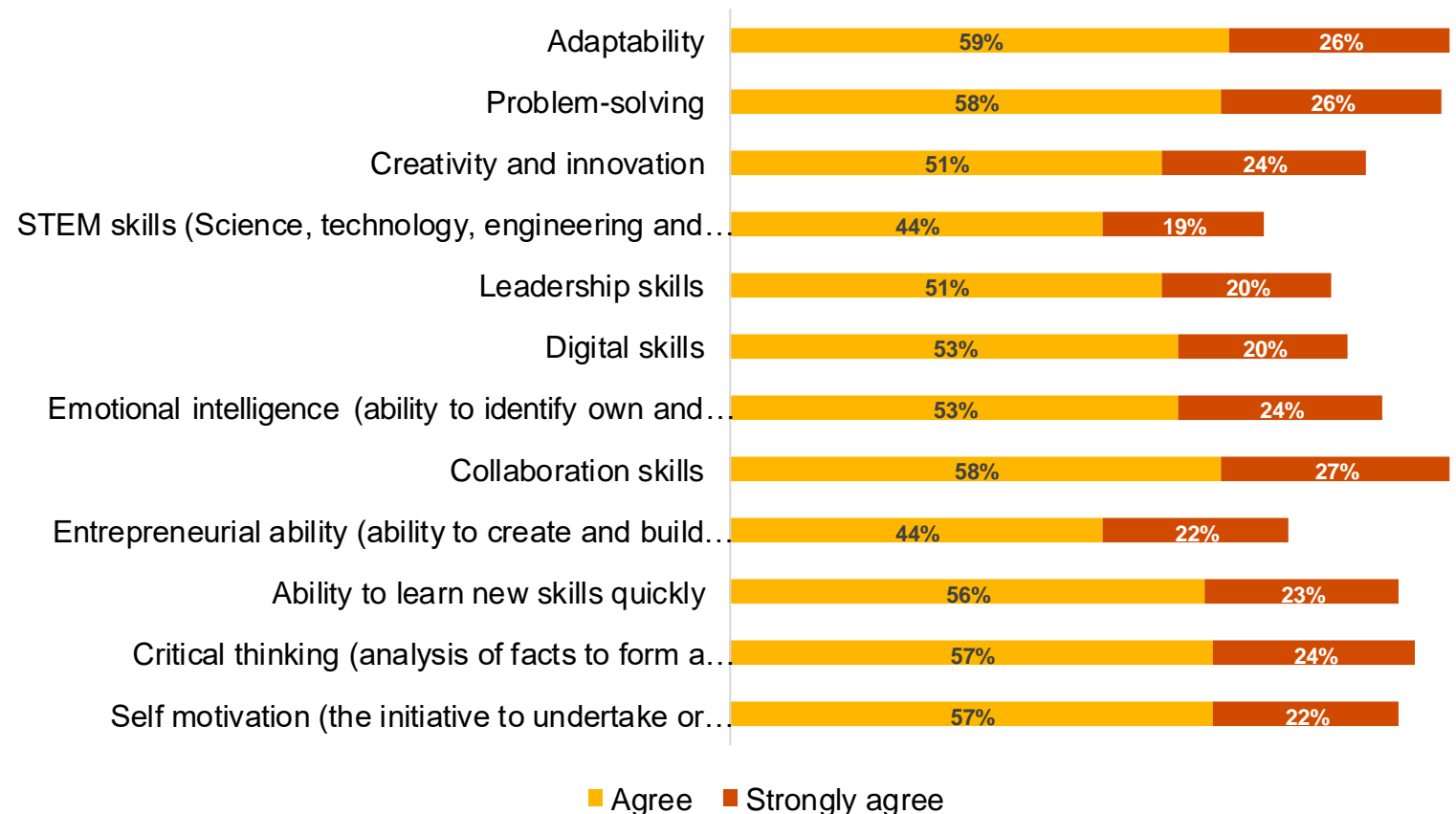
## The most frequently claimed skills are all transferable skills:

- Collaboration skills (85%)
- Adaptability (85%)
- Problem-solving (84%)
- Critical thinking (81%)

## The skills people tend to lack are:

- STEM skills (63%)
- Entrepreneurial ability (66%)
- Leadership skills (71%)
- Digital skills (73%)

Percentage of people claiming different skills (Mainland China data)



# Globally, workers are ready to learn new skills... but many lack the opportunity and resources to do so

77%

are ready to learn new skills or completely re-train in order to remain employable in the future’.

74%

say they ‘continually learn new skills so I can keep up with changing technology’ - 26% strongly agree.

21%

are getting **No opportunities at all** from their employer to develop their digital skills outside their normal duties.

55%

say their ability to develop skills has been limited by a **lack of access to technology devices or infrastructure** such as broadband or reliable Wi-Fi.

46%

think they’re **unlikely to earn enough to pay for further education** or retraining.



# The willingness and opportunities to learn seem more optimistic in Mainland China, but financial and technology resources are still major difficulties

81%

are ready to learn new skills or completely re-train in order to remain employable in the future’.

89%

say they ‘continually learn new skills so I can keep up with changing technology’ - 33% strongly agree.

93%

are getting **opportunities** from their employer to develop their **digital skills** outside their normal duties.

85%

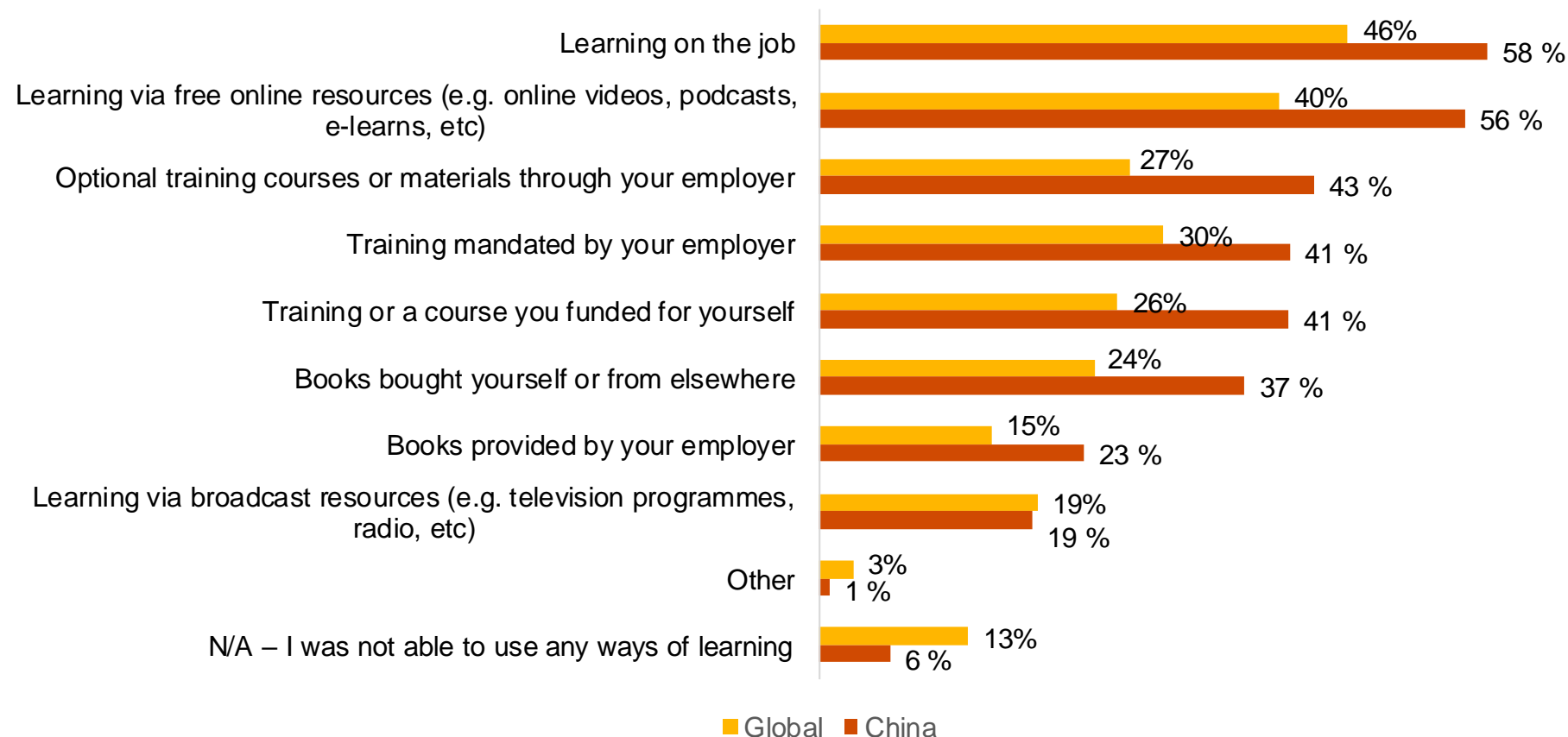
say their ability to develop skills has been limited by a **lack of access to technology devices or infrastructure** such as broadband or reliable Wi-Fi.

37%

think they’re **unlikely to earn** enough to **pay for further education** or retraining.

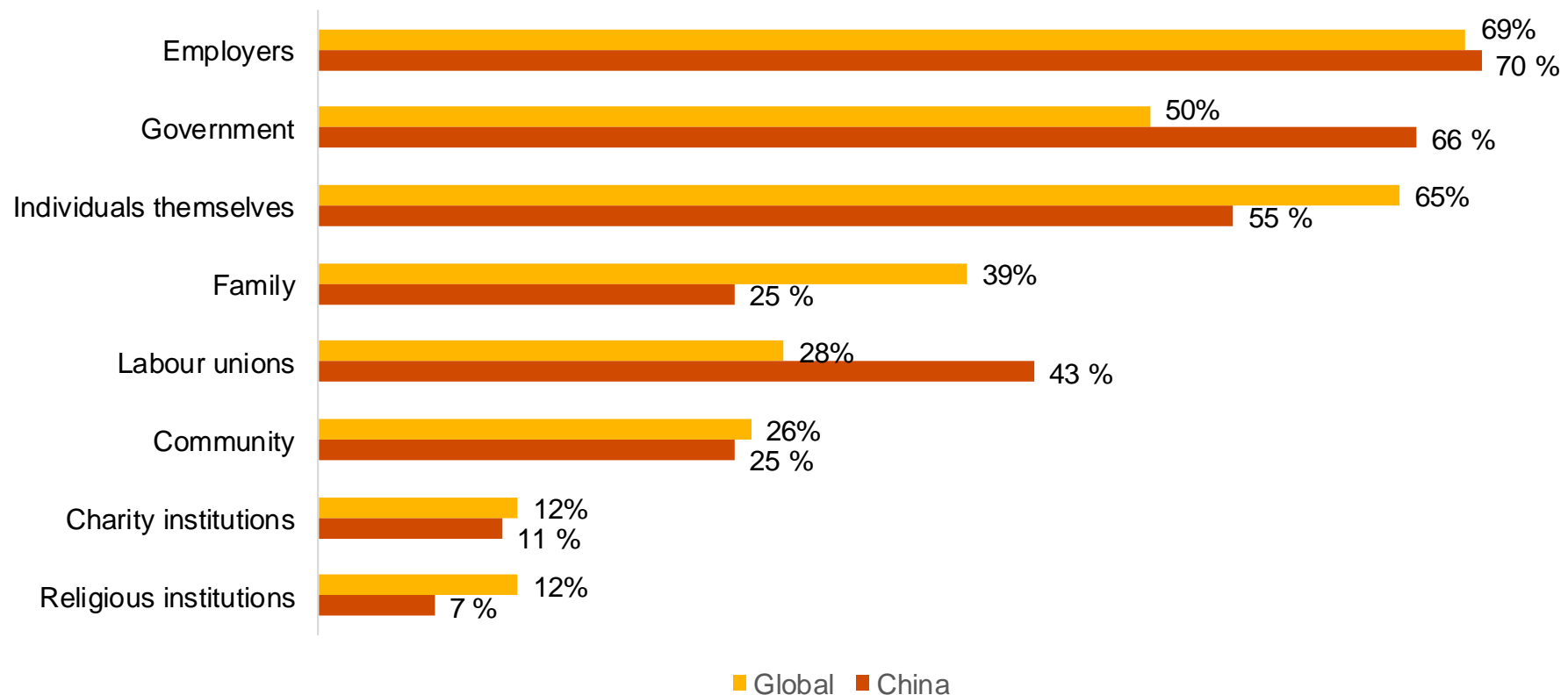
# It seems that Chinese people are making better use of existing resources of learning

Percentage of people using different learning resources



# Chinese people expect employers and institutions (government, labor unions) to take more responsibilities for reskilling and upskilling

Who is **most responsible for helping people to reskill?** Please rank the following choices from most to least responsible. (**Top 3 choices**)



# COVID-19 has hastened the adoption of digital skills globally

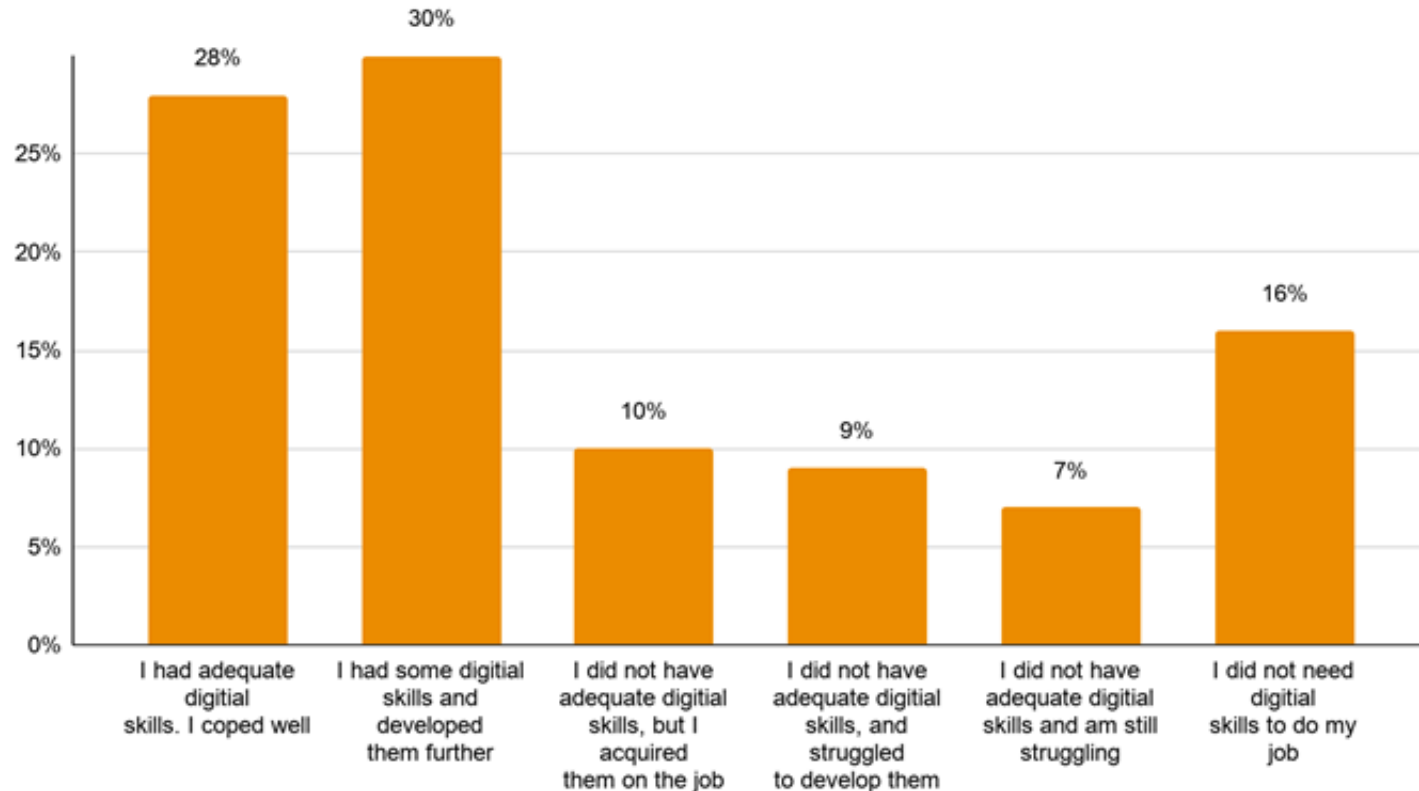
**28%**

say they began the pandemic without adequate digital skills.

**40%**

successfully improved their digital skills during the pandemic.

Since the pandemic began, what best describes your experience regarding any digital skills needed to do your job?



# .....and that facilitation of digital skill development is even more outstanding in Mainland China

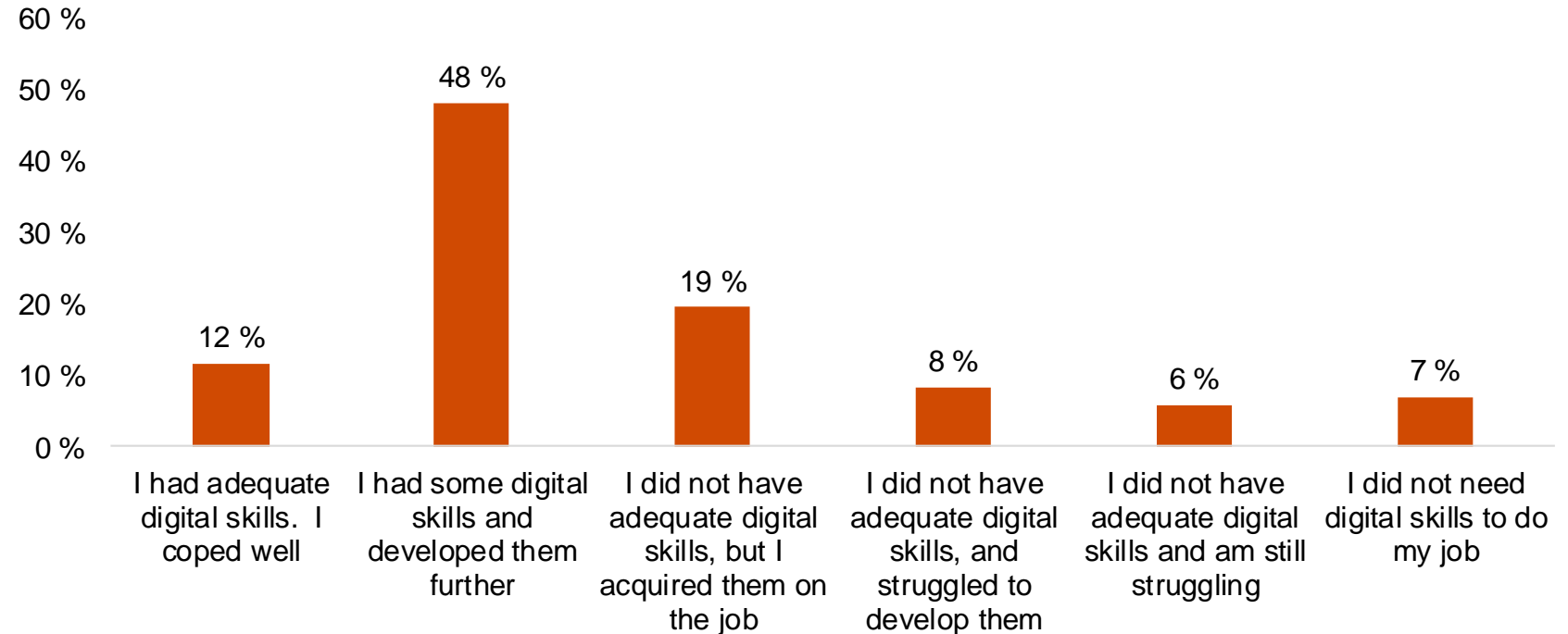
**12%**

say they began the pandemic without adequate digital skills.

**67%**

successfully improved their digital skills during the pandemic.

Since the pandemic began, what best describes your experience regarding any digital skills needed to do your job?





What could we do?

# What could we do?

## Fast Facts

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**Concerns about job security**

**Strong bias towards remote and hybrid working**

## What could we do

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### **Enlarge job content and enhance talents' competency**

- **Enlarge or enrich job content** to absorb talents at workplace.
- To **connect talents with tasks** with dynamic talent profile and provide more employment possibilities for right talents.
- Provide highly customised and personalised training or development for talents. Empower them to achieve their career goals continuously.

### **Encourage & Enable people to collaborate online**

- **Embrace the future work with digitalisation.** Encourage your staff to collaborate online and deal with IT system to improve their working efficiency.
- **Equip people with digital knowledge and skills.** Initiate digital innovation in your organisation, and start organisational journey of digital.

# What could we do?

## Fast Facts

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**Discrimination and lack of support are holding people back**

**Balance between impact and income**

## What could we do

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### New way to define and seek talent

- **Data analysis technology** allows us to build our **talent profile focusing on factors that lead to better performance**, other than relying on “thumb of rules”.
- **Techniques and tools** can be involved in **matching talents with tasks**, to decrease the influence of conscious and unconscious discrimination.

### People-oriented organisation

- Provide **support on health, mental and emotional well being, work-life balance**, to take good care of talent assets.
- Leverage new technologies and change the way we support our talents, to be **more accessible and individualised**.

### Motivate people in different ways

- **Leverage both mental and material motivations** and provide different incentives for different people
- Organise people with a **shared, inspiring purpose** instead of detailed rules and procedures, and encourage people to find meaning in work.



# What could we do?

## Fast Facts

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**Reserved willingness to share personal data**

**Lack of ownership and resources in learning and development**

## What could we do

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### Data driven performance analysis

- When acceptable, **data produced at work could be collected and analyzed** to dig out factors and behaviors that lead to high performance.
- As a virtual “treatment”, **behavioral nudges and tips** can provide daily guidance and support to enhance performance.
- In addition, more research and investment in **data security and privacy** is needed to reduce people’s concern.

### Empower people to reskill and upskill

- Create a workplace that **encourages growth and embraces changes**.
- Shift the responsibility of **learning from institutions to individuals**. Provide support to people to **develop their own career plan and learning goals**.
- **Leverage on digital technology to provide new development tools and resources** with higher accessibility, flexibility and lower costs.

# Contact us



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