



Sectoral Human Capital
Study II (BBKL II)

Trade sector

About the study



Study Objective

To increase the knowledge about the current and future demand for skills in the trade sector



Research Dates

1st edition of the study:
February 9 – August 6, 2021

Quantitative study:
July 1 – August 6, 2021



Respondents

Qualitative study:

Employers, industry experts, education and HR experts

Quantitative study:

Employers and employees in the trade sector
(PKD 46, PKD 47)

Number of
employees:

2 081 912*

Number of
businesses:

187 891**

*Statistics Poland, November 2020

**ZUS, data as of December 31, 2020, trade enterprises excluding the self-employed



Research Methods

Individual In-depth Interviews with employers' representatives

Individual In-depth Interviews with industry analysts and HR experts from the sector

Expert panels

Consultation with sector staff

Panel discussion with members of the Sector Competence Council

Delphi survey with 40 industry experts

Quantitative survey of employers (N=809) and employees (N=824) in the sector



Key business processes and key job positions in the sector

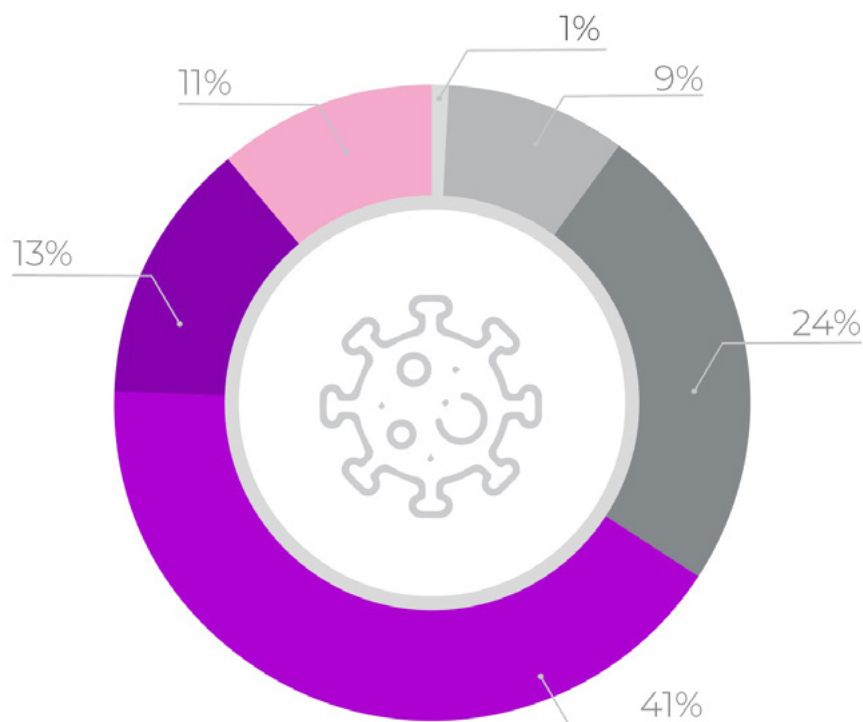


Key job positions:	Business process:
Director of purchasing	» Purchase
Category manager	» Purchase
Business analysis specialist	» Purchase
Sales and marketing director	» Sales
Customer service specialist (including e-commerce)	» Sales
Salesperson/cashier-salesman	» Sales
Sales representative	» Sales
Digital marketing specialist	» Sales
Warehouse worker	» Purchase/Sales

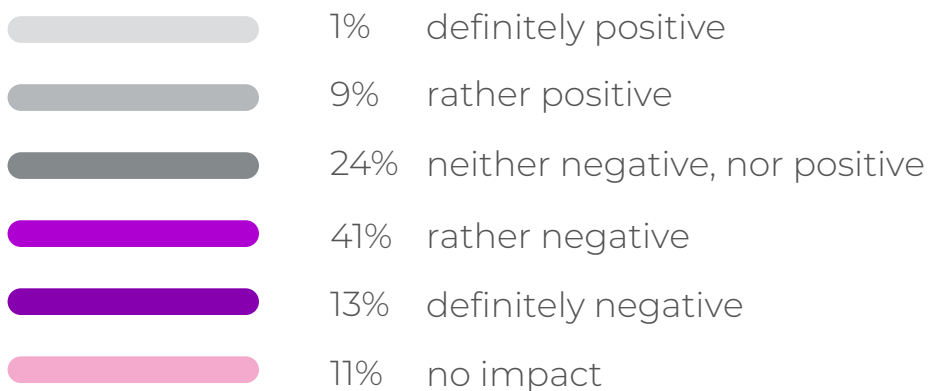


Situation in the sector: impact of the pandemic

Impact of the pandemic on
companies' operations:



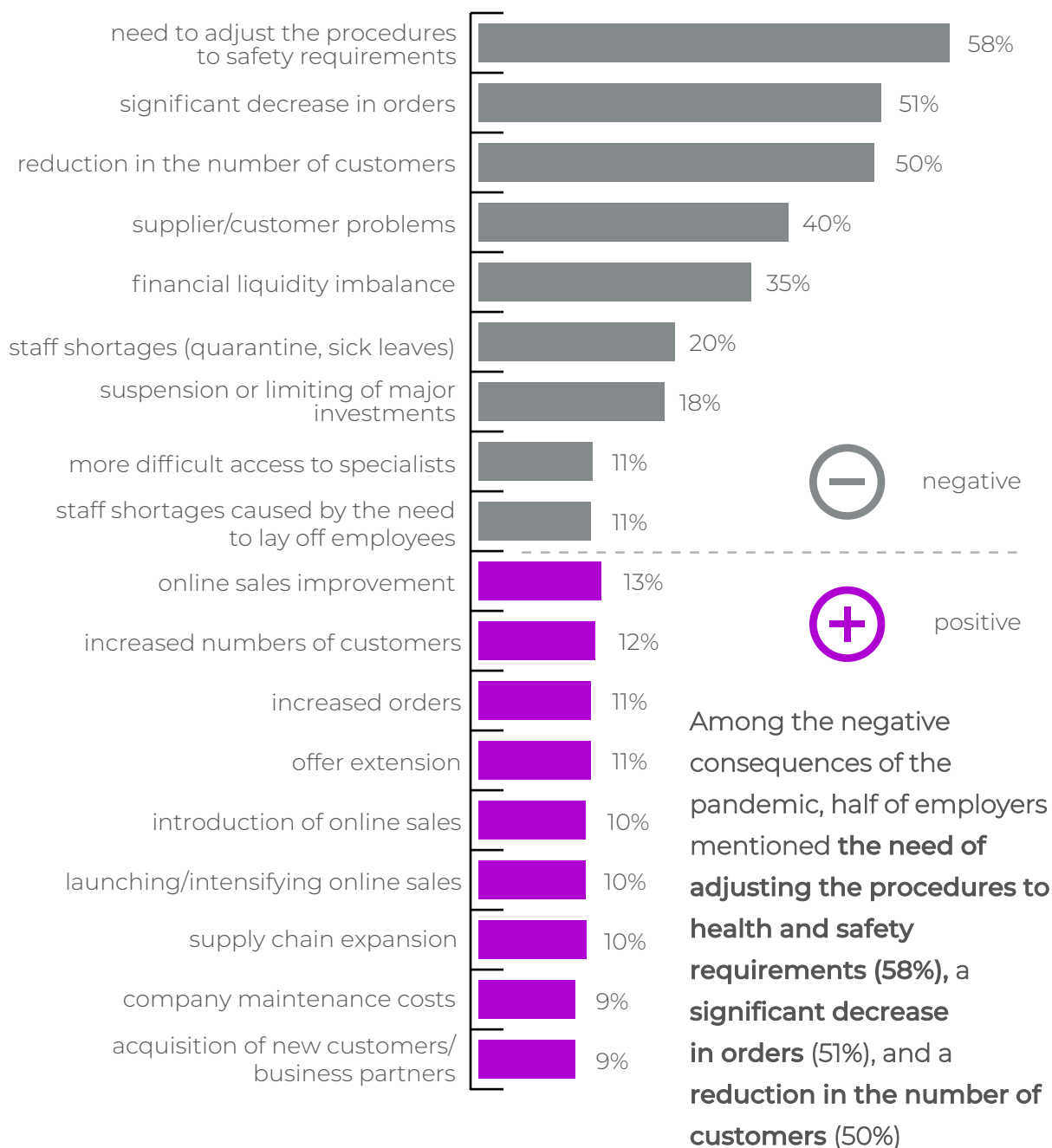
- 10% - the impact was positive
- **over a half** - the impact was negative



Source:

Own study based on BBKL II Trade, employers. 1st edition 2021 (n=809)

Situation in the sector: consequences of the pandemic

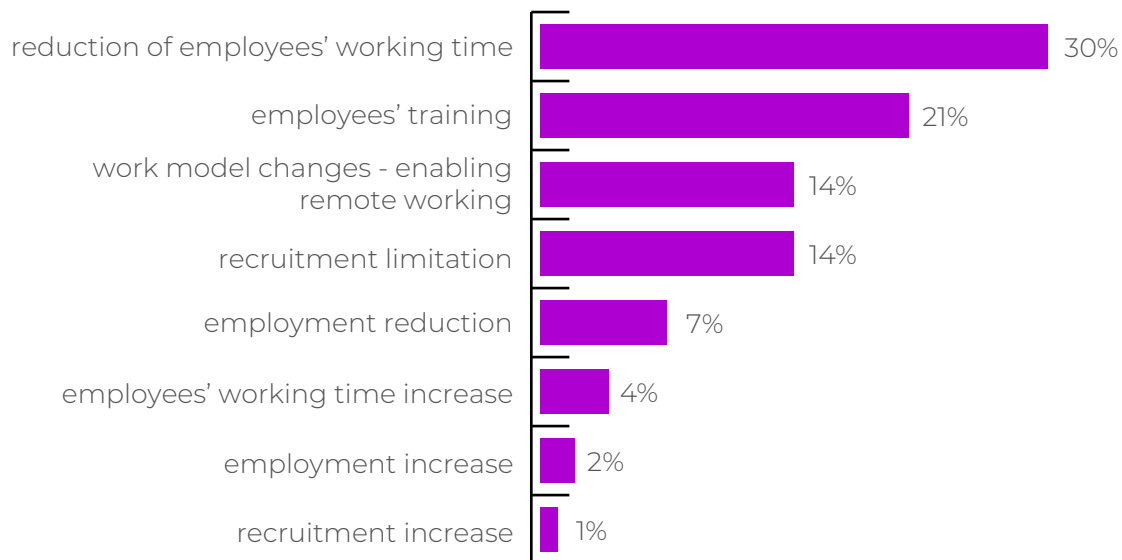


Source:

Own work based on BBKL II Trade, employers. 1st edition 2021 (n=809)



Situation in the sector: employment solutions implemented by companies during the pandemic



7% Employment reduction affected only 7% of the surveyed companies

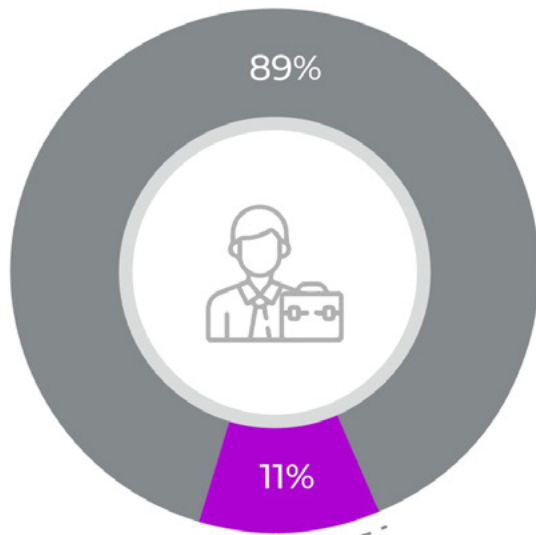
The most common solutions were less radical, i.e.:

- » reduction of employees' working time (30%)
- » employees' training (21%)
- » work model changes - remote working (14%)
- » recruitment limitation (14%)

Source:

Own study based on BBKL II Trade, employers. 1st edition 2021 (n=809)

Looking for employees



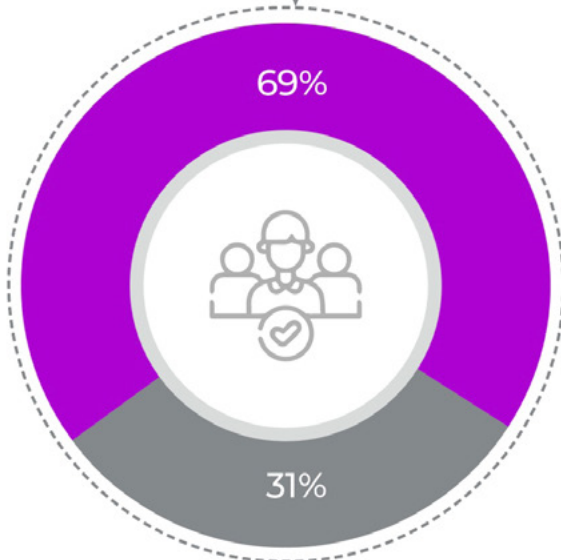
Looking for employees in the past 12 months - employers

89% did not look for employees

11% looked for employees

Source:

Own study based on BBKL II Trade, employers. 1st edition 2021 (n=809)



Percentage of employers who did or did not experience problems finding suitable employees in the past 12 months

69% had problems

31% had no problems

Source:

Own study based on BBKL II Trade, employers. 1st Edition 2021 (n=138).

The question was answered by employers who looked for employees in the past 12 months

Supply and demand analysis

Job positions with biggest hiring problems in the past 12 months



Clerk/cashier
(33%*)



Warehouse
worker
(16%)



Courier/driver
(8%)



Merchant
(8%)



Director of sales and
marketing
(8%)



Sales
representative
(7%)

* 33% of employers who had problems finding employees identified the position of clerk/cashier as the most difficult to fill

Source:

Own study based on BBKL II Trade, employers. 1st edition 2021 (n=89). The question was answered by employers who had difficulty finding suitable employees.

Job positions with biggest numbers of applicants



Clerk/cashier
(41%)



Warehouse
worker
(14%)



Sales
representative
(9%)

Source:

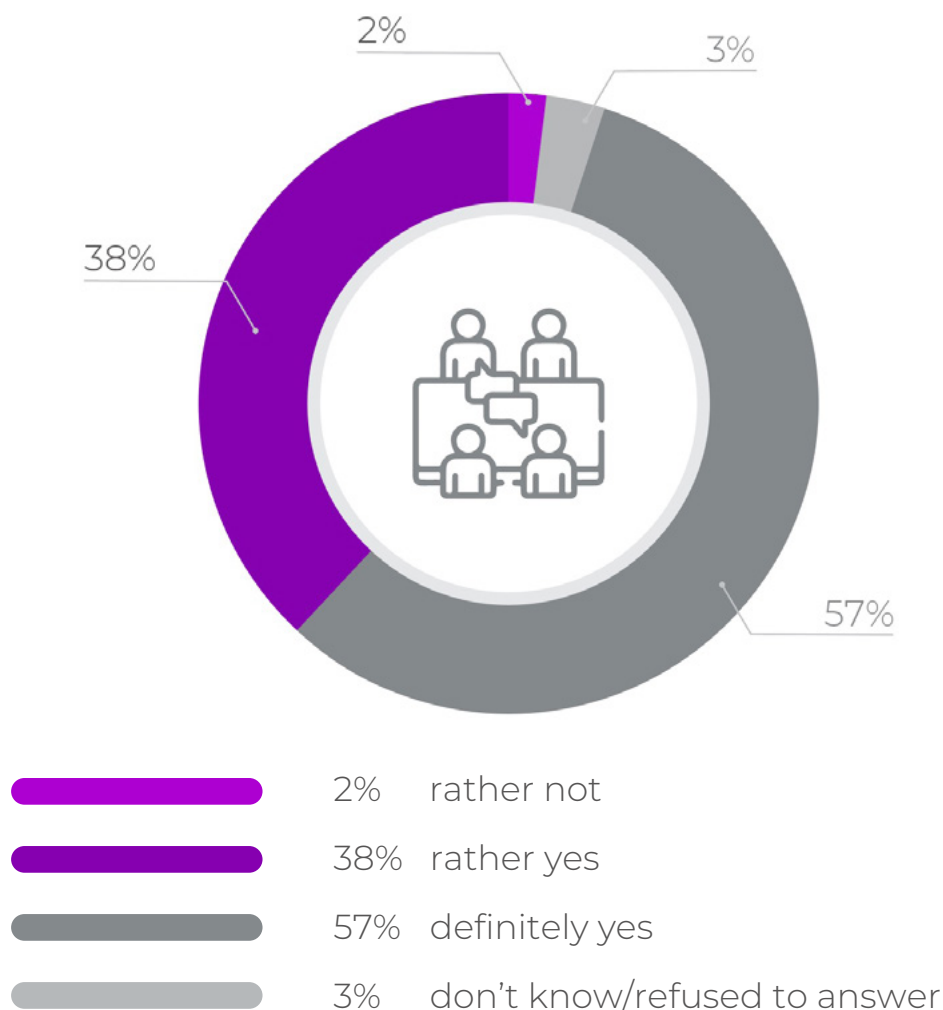
Own study based on BBKL II Trade, employers. 1st edition 2021 (n=138). The question was answered by employers who looked for employees in the past 12 months.

Employee retention

94% of employees in the key positions do not intend to change jobs in the coming year

94% are satisfied with their work

The prospect of continuing to work in current employment – employees in key positions



Source:

Own study based on BBKL II Trade, employees. 1st edition 2021 (n = 824)

Sector competence

93% of employers are fully satisfied with the skills of their employees

- » Most employers (93%), regardless of company size, subsector, online sales, and profit made, believe that the **skills of most of their employees are fully satisfactory and don't require improvement**
- » Only 3% of employers report that skills need to be developed in certain areas
- » According to experts, the trade sector mostly lacks **technical and digital skills** connected with the progressing automation of sales processes and development of modern sales channels, and **social skills** (creativity, readiness to learn, critical thinking)
- » Most employers believe that **the importance of individual skills in the key positions will remain the same in the future**

Balance of competences (skills)

The objective:

- » to assess skills' mismatch
- » to identify the competence gap
- » to assess the importance of skills in the future

A competence gap

- » A **competence gap** – refers to **skills that are relatively more important for employers while being difficult to obtain** according to over 50% of employers evaluating a given competence profile

-
- » **Competence gap is greater in the case of more specialised and higher positions**



Business Analyst
Specialist



Purchasing
Director



Director of
Sales and
Marketing

-
- » The biggest number of skills that fall within the competence gap and whose importance will increase was identified at the highest positions i.e., **purchasing directors, sales and marketing directors, and business analysis specialists**



Clerk/cashier







Warehouse
worker



Competence most important for key positions (as perceived by employers)

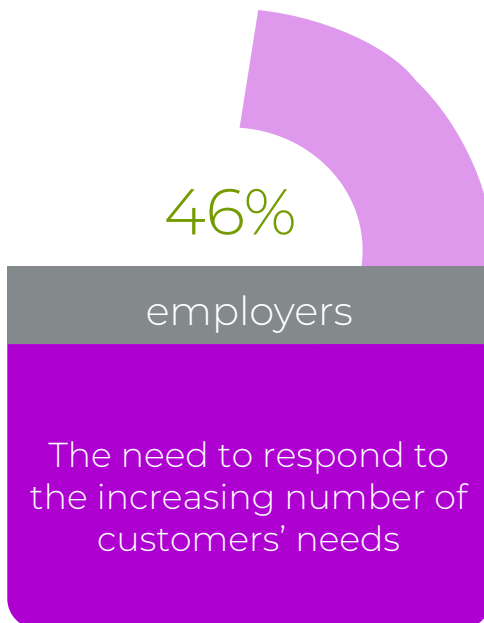
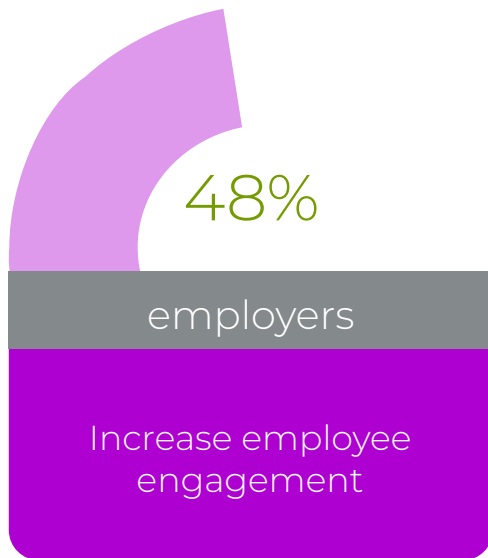
	Knowledge	Skills	Social
 Purchasing Director	Knowledge how to build a purchasing and pricing strategy	Knowledge of consumer preferences	Assertiveness
 Business Analyst Specialist	Ability to work with databases	Analysis of assortment items margins	Proactive sharing of insights based on completed analyses
 Category manager	Knowledge of one's market segment	Driving license, category B	Negotiating, pushing one's ideas, influencing
 Warehouse worker	Knowledge of goods reception and inventory procedures	Analysis and updates of inventory availability	Responsibility
 Customer Service Specialist	Knowledge of company processes with particular emphasis on logistics process	Using internal systems and linking information between them	Ability to learn quickly; ease of assimilating technical knowledge

Competence most important for key positions (as perceived by employers)

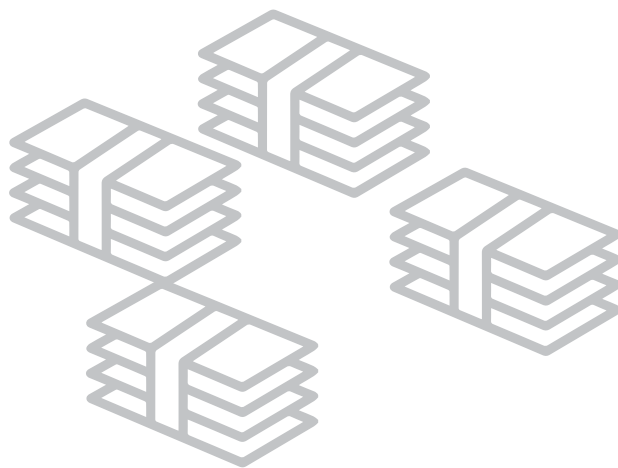
	Knowledge	Skills	Social
 Clerk/cashier	Knowledge of cash register operation	Building a professional corporate image	Sales targets orientation, openness
 Digital marketing specialist	Industry knowledge	Practical skills in operating graphic programs	Creativity, willingness to experiment and implement novelties
 Director of Sales and Marketing	Knowledge of sales and negotiation techniques	Data analysis, making conclusions based on data	Analytical and synthetic skills, conceptual thinking
 Sales representative	Knowledge of how to prepare an offer	Planning a sales call based on goals analysis	Goal orientation



Challenges in daily business operations (as perceived by employers)



Most attractive ways to motivate employees

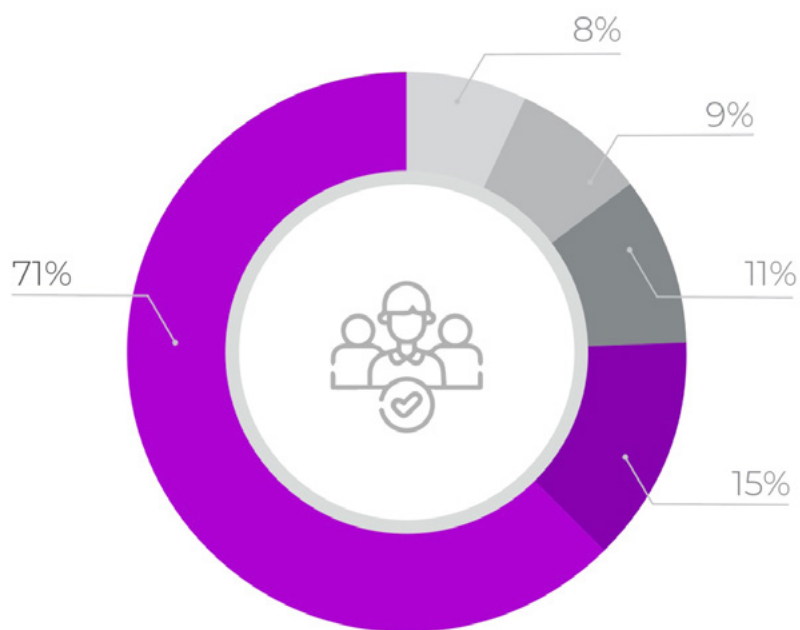


Source:

Own study based on BBKL II Trade, employees. 1st edition 2021 (n=824)



Measures implemented by employers if employees lack competence



- 71% training of current employees
- 15% business reorganization
- 11% employment of new hires
- 9% employment of new hires to be trained
- 8% nothing

71% When the lack of specific skills is identified, most employers (71%) take action to retrain their employees

Source:

Own study based on BBKL II Trade, employers. 1st edition 2021 (n=809)

Most effective training activities according to industry experts



Most common training topics

- » retraining of employees for new positions
- » product training
- » management training
- » job-specific training
- » soft skills development
- » customer service
- » negotiation skills in customer service
- » remote work management

Source:

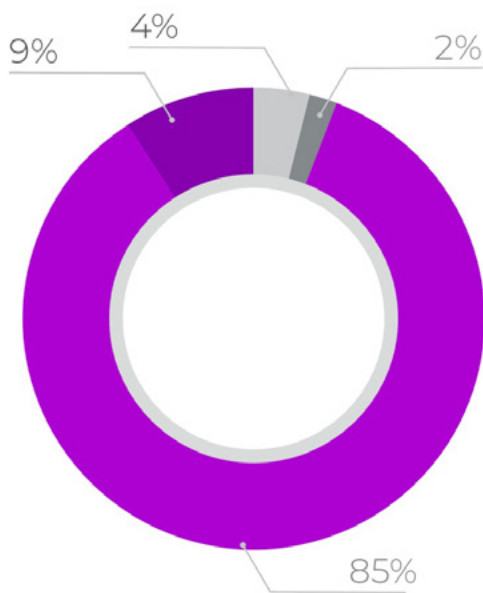
Own study based on BBKL II Trade - qualitative research



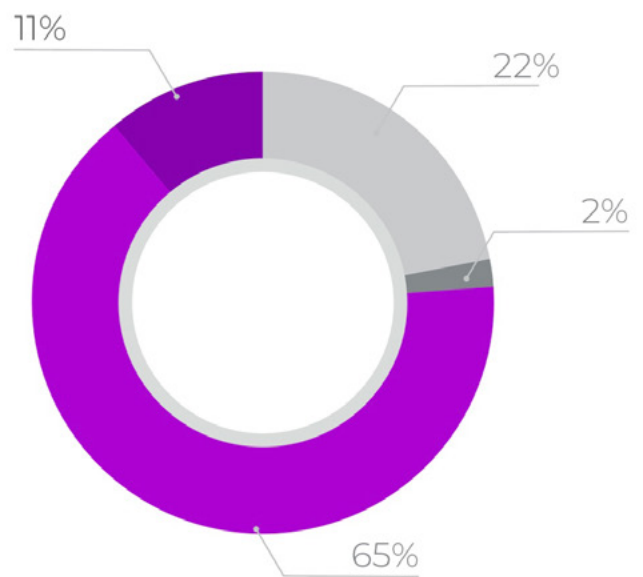
Future of the Trade Sector: employers' hiring forecasts

A vast majority of employers expect no change in hiring over the next year and the next five years (85% and 65%, respectively)

Hiring over the next year



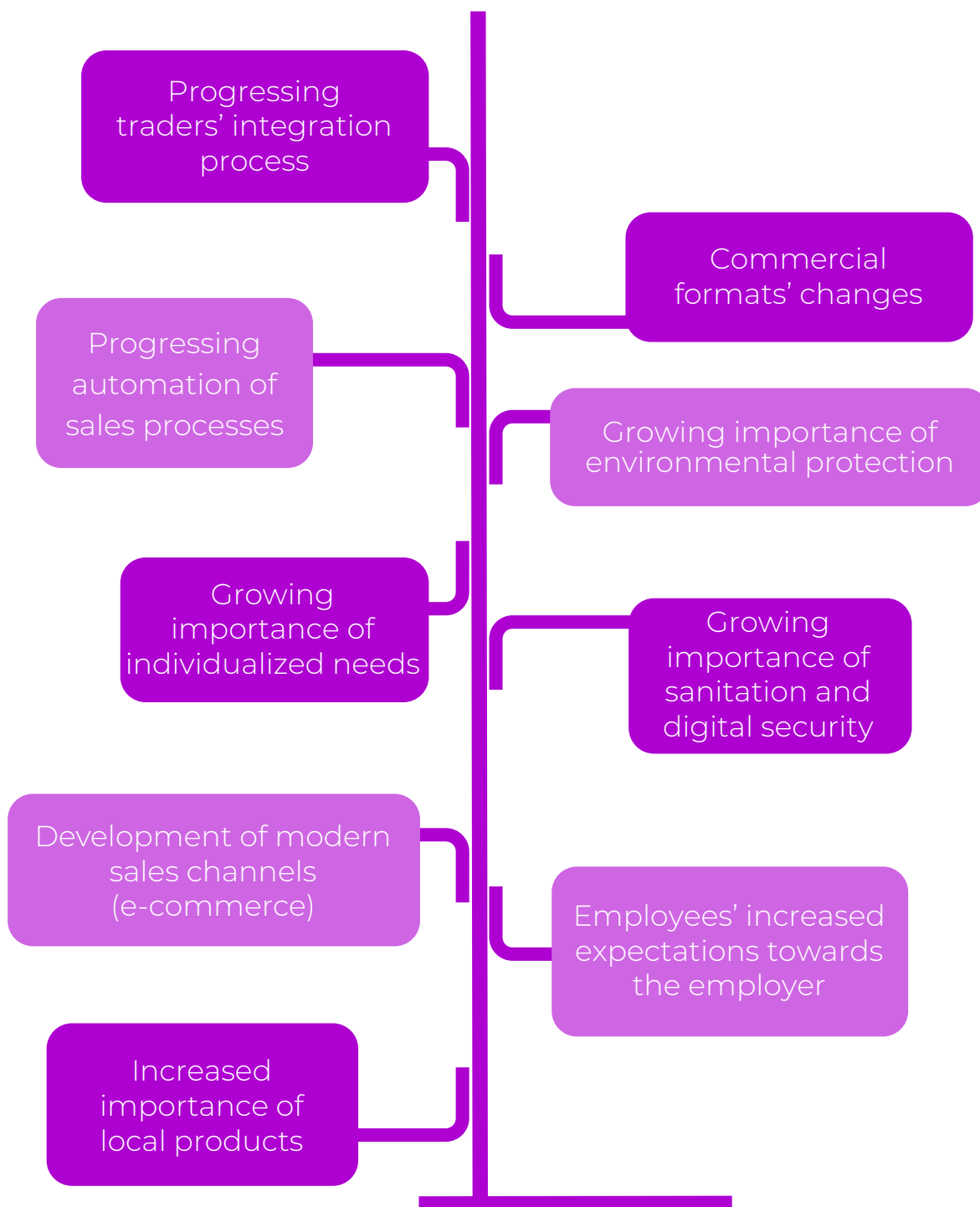
Hiring over the next five years



Source:

Own study based on BBKL II Trade, employers. 1st edition 2021 (n=809)

Trends in the sector as symptoms of change



Source:

Own study based on BBKL II Trade - qualitative research



What's next? Development scenarios

Digital Commerce

Key characteristics:

- » Digitalization, e-commerce
- » Omnichannel

Labour market consequences:

- » Reduced demand for employees performing simplest, repetitive tasks (e.g., cashiers), or moving sales processes of this type to the back office
- » Increased importance of business intelligence skills related to the operation of machinery and equipment used in warehouses
- » Demand for employees who know and can use modern information and communication technologies
- » Hiring employees able to leverage e-commerce and effectively lead the omnichannel
- » Increased demand for skills from the area of e-commerce offer building, promotion and communication with online customers
- » Creation of new positions, e.g., Digitalent, Customer Helpdesk

A highly probable scenario for the next 5 years
according to **38 / 44** experts



What's next? Development scenarios

Client-centric strategy +

Key characteristics:

- » Progressing changes in customers' preferences and shopping behaviours (client-centric strategy, customization – “on-demand” products)
- » Prosumerism (commitment to customer co-creation)
- » Increasing importance of convenience stores - shopping destinations closer and more convenient for customers

Labour market consequences:

- » Increased importance of social skills, Interdisciplinary skills (e.g., combination of knowledge about customer service, new technologies, merchandising, building customer relations)
- » Growing importance of skills from the following areas: data analysis, customer experience, customer journey
- » Growing demand for sector knowledge and customer communication skills
- » Increased interest in branded and/or premium product launch specialists who can compete for customers

A highly probable scenario for the next 5 years according to **38 / 44** experts



What's next? Development scenarios

Outsourcing of services

Key characteristics:

- » High costs of implementation and maintenance of e-commerce encourages delegation of these sales process tasks outside the company
- » Supporting outsourcing companies entering the e-commerce market, e.g., by creating sales platforms and providing resources to support and promote them

Labour market consequences:

- » Lower labour costs associated with reduced employment in commercial entities
- » Access to a larger group of specialists
- » Access to unique skills (e.g., less popular foreign languages) enabling operations in new markets

A highly probable scenario for the next 5 years according to **32 / 44** experts



What's next? Development scenarios

Eco-trade

Key characteristics:

- » Ecology, zero waste
- » Rise of the sharing economy
- » Re-commerce - e-commerce, distribution of second-hand or recycled products
- » Connecting people through online platforms, enabling them to provide services and share assets, resources, time, skills, and capital, without ownership transfer
- » Changes in shopping and sales model, promoting shopping minimalism and shared responsibility for the environment

Labour market consequences:

- » Increased importance of skills connected with awareness and sensitivity in the use of pro-ecological and pro-social solutions, taking care of natural resources, ethical production and fair trade for brand development
- » Increased demand for sales skills needed to serve the so-called conscious customer (e.g., knowledgeable about ecology, product composition, packaging recycling methods)
- » Increased importance of knowledge and skills from the area of CSR, environmental protection, image building, entrepreneurship, and initiative
- » Improving the company's image

A highly probable scenario for the next 5 years according to **31 / 44** experts



Full survey results are discussed
in the study:

**Sectoral Human
Capital Study II. Trade sector**

Report from the first edition of
the survey (in Polish)



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