



Digital Freelancers in Europe

(Focus on France, Germany, Spain)

Presentation of results

29th JUNE 2020





Key messages on the freelancers surveyed

They are / have...

Men

55%

A **BAC+5** (5-year higher education degree) (and 81% have at least a BAC+3)

53%

Former employees

93%

Specialized in **Tech/Data** (29%), **Visual/Audio Creation** (29%), **Comm/Marketing** (23%)

81%

They want...¹

Autonomy (to manage their time)

85%

Freedom of choice (on their assignments)

78%

And their clients...

The **flexibility**

85%

The **specific skills** they bring to the table

83%

They're ahead of the game when it comes to new WoW

They **practice Agile** (40% a lot)

73%

They **work remotely**

59%

They **invest in training** to maintain their skills up to date

4.2h /week

They want to continue as **freelancers** despite crisis headwinds

84%

1. Percentage of respondents who considered this criterion to be important or very important

2. WoW = Ways of Working



Key messages on the freelancers surveyed

They are / have...

Mainly **men**

74%

A **BAC+5 (5-year higher education degree)** (and 75% have at least **BAC+3**)

52%

Former employees

92%

Work either in **Tech/Data**(24%), **Visual/Audio Creation** (19%), **PM/Agile Coaches** (18%)

61%

They want...¹

Autonomy (to manage their time)

80%

Freedom of choice (on their assignments)

79%

And their clients...

The **flexibility**

83%

The **specific skills** they bring to the table

89%

They're ahead of the game when it comes to new WoW

They **practice Agile** (46% a lot)

68%

They **work remotely**

45%

They **invest in training** to maintain their skills up to date

4.7h /week

They want to continue as **freelancers** despite crisis headwinds

84%

1. Percentage of respondents who considered this criterion to be important or very important



Key messages on the freelancers surveyed

They are / have...

Mainly **men**

66%

A **BAC+5 (5-year higher education degree)** (and 76% have at least BAC+3)

35%

Former employees

97%

Work either in **Tech/ Data** (38%), **Visual/Audio Creation** (27%), **Comm/ Marketing** (21%)

86%

They want...¹

Autonomy (to manage their time)

79%

Freedom of choice (on their workplace)

78%

And their clients...

The **flexibility**

78%

The **specific skills** they bring to the table

75%

They're ahead of the game when it comes to new WoW

They **practice Agile** (29% a lot)

58%

They **work remotely**

69%


They want to continue as **freelancers** despite crisis headwinds

73%

1. Percentage of respondents who considered this criterion to be important or very important

Survey methodology

Methodology

 Survey conducted jointly by MALT and BCG from May 13 to June 9, 2020

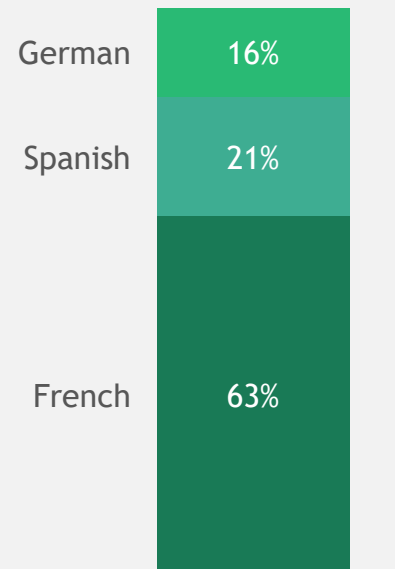


Panel composed of French, German and Spanish respondents



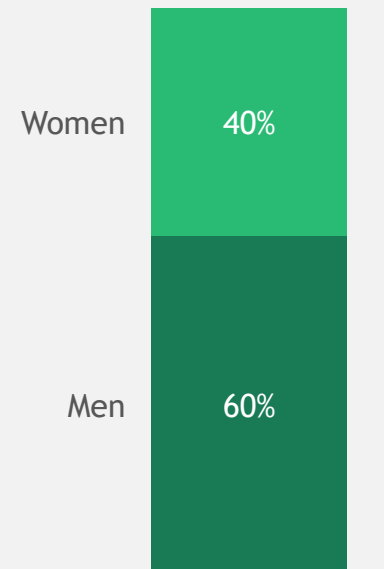
2,324 responses

Nationalities represented

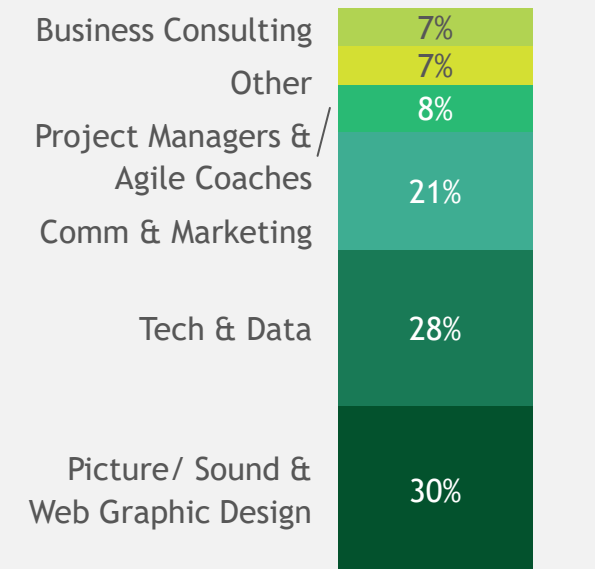


Presentation of the panel

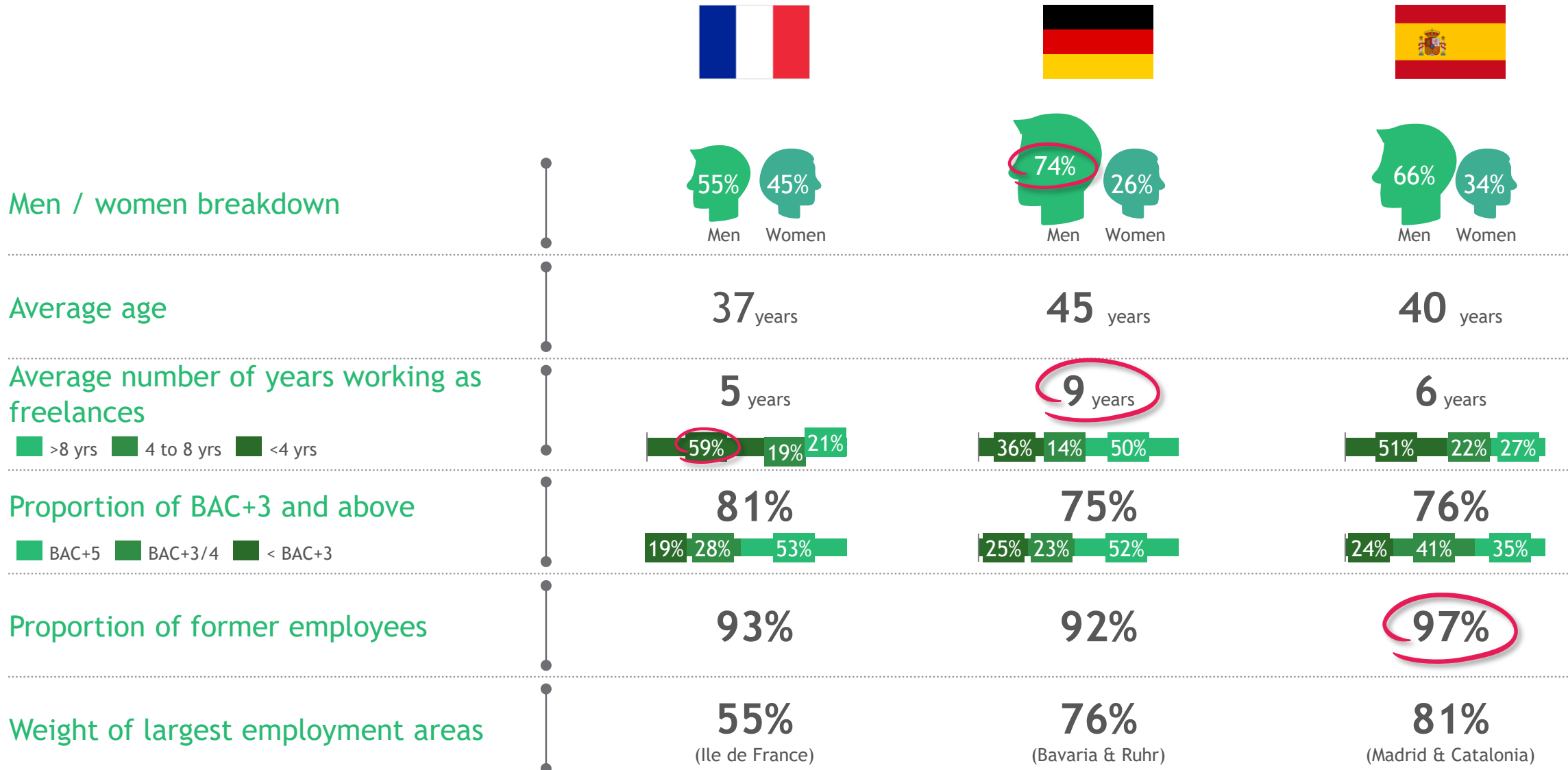
Breakdown by gender



Activities carried out

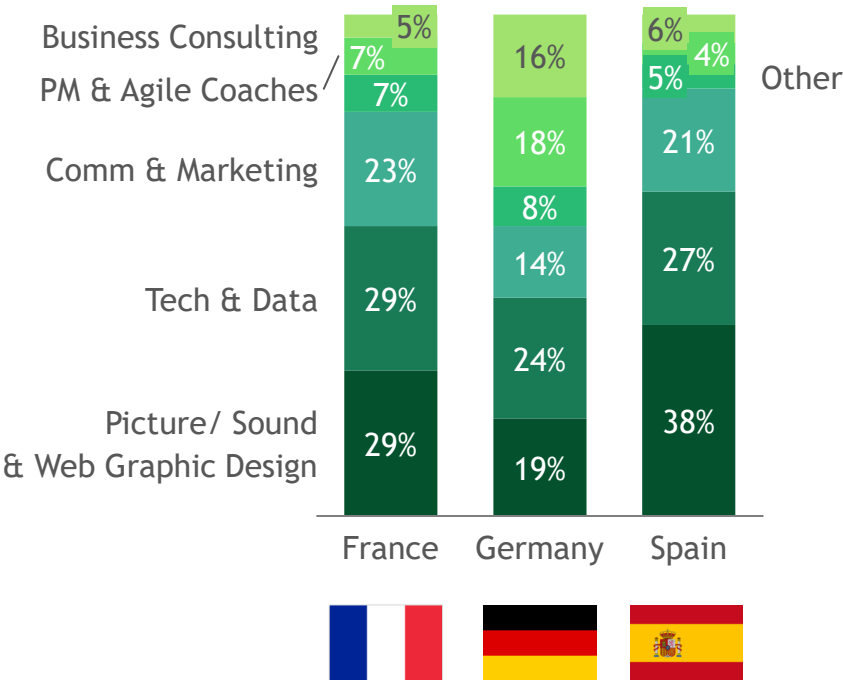


ID of the sample surveyed

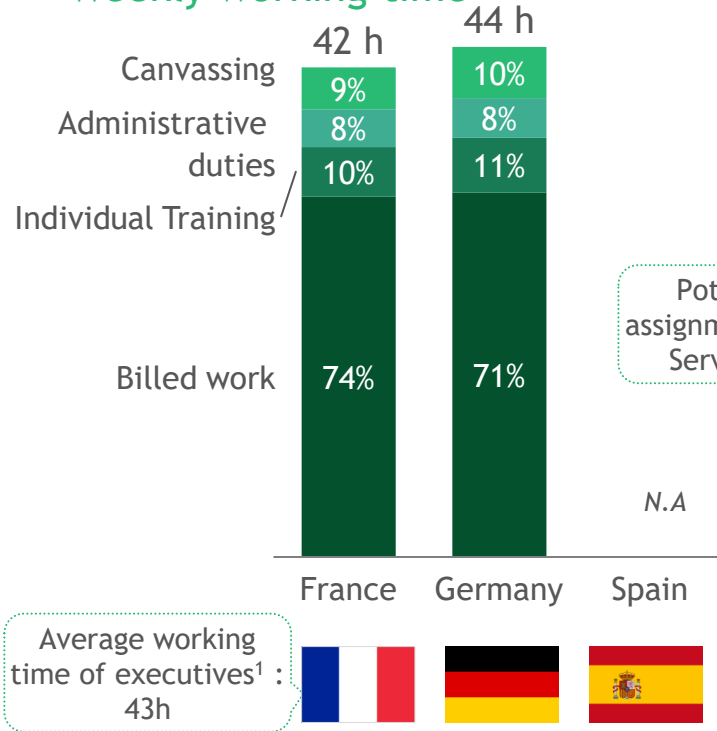


Freelancers practice mainly in Tech&Data or creative professions. They work as much as the average executive, mainly for SMEs

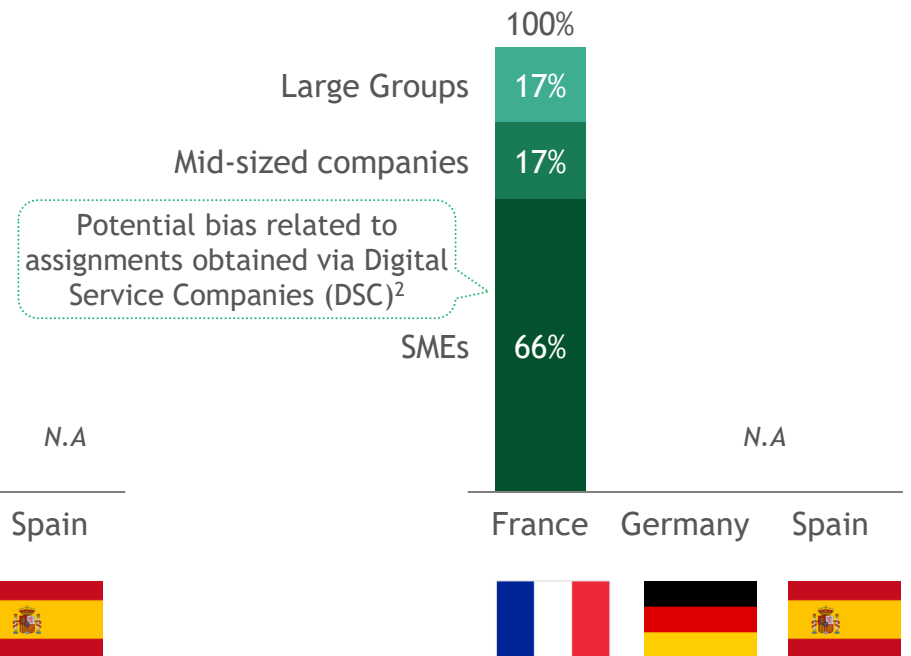
Breakdown of respondents by profession



Weekly working time



Typology of clients



Questions asked: What is your profession family? How much time do you spend each week on the following activities [not available for Spain]? How much of your work is done with the following types of clients [not available for Germany and Spain]?

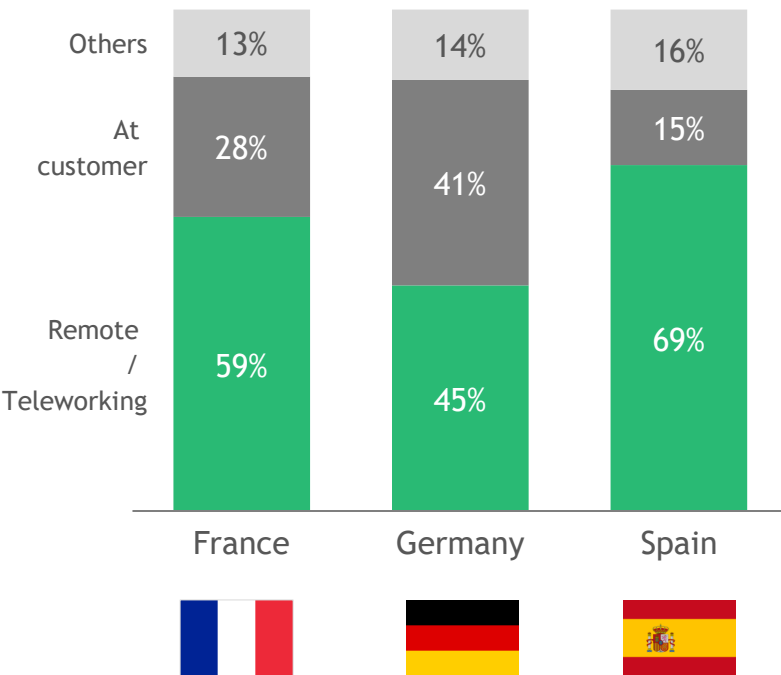
1. CFTC study - Average working time in France (May 2019) 2. When they go through a DSC to deal with a large group, freelancers reported dealing with SMEs

Note: SME < 250 employees, and Large Groups > 5,000 employees

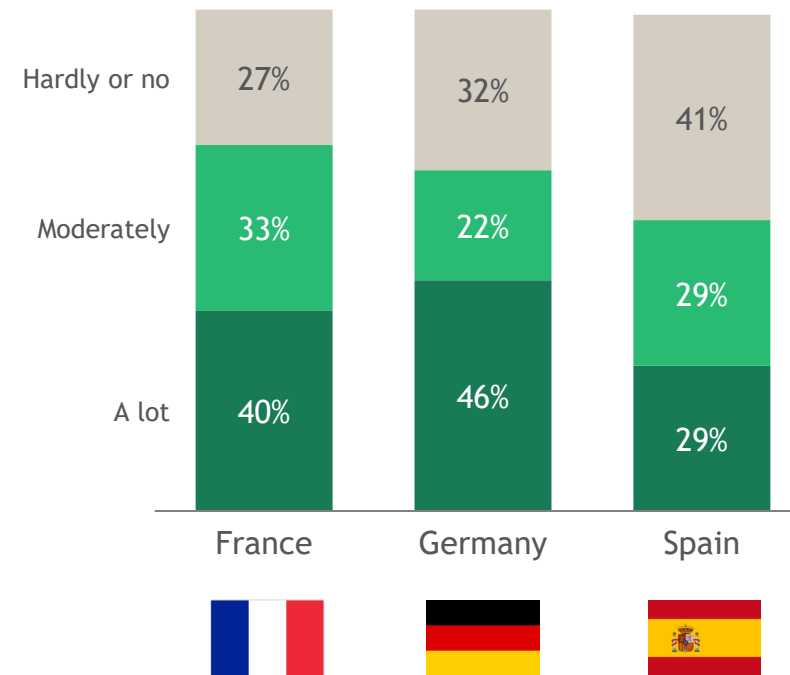
Source : Malt / BCG survey (May-June 2020) - 2,324 respondents (1,465 in France, 494 in Spain, 365 in Germany)

Freelancers are pioneers of new ways of working (remote working, agile, time devoted to training / skill-development)

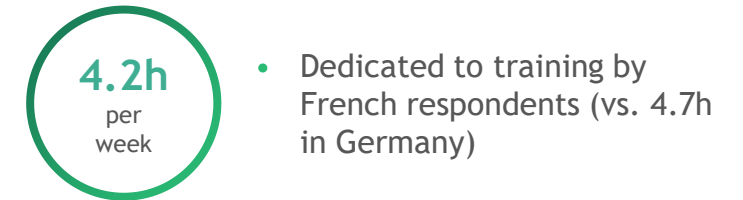
Workplace (% of time)



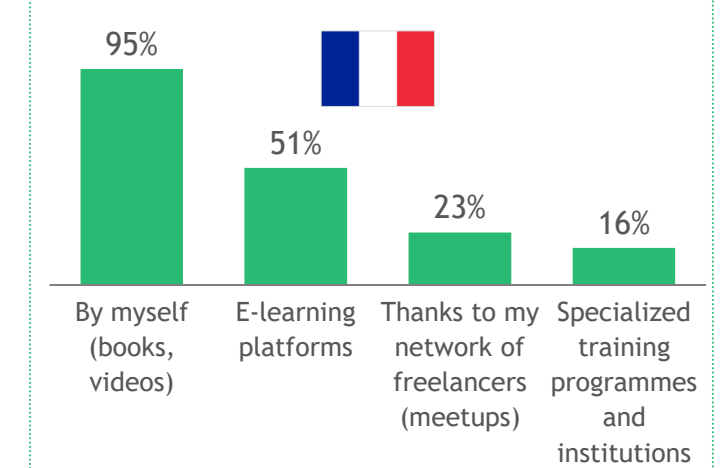
Adoption and frequency of use of Agile ways of working



Time spent on individual training



Main training channels used¹



Questions asked: How much of your time do you spend in the following places? What is your level of adoption of agile work methods? How much time per week do you spend on training & what channels do you use?

1. Percentage of respondents mentioning this choice. *Data not available for Germany and Spain*
 Source : Malt / BCG survey (May-June 2020) - 2,324 respondents (1,465 in France, 494 in Spain, 365 in Germany)

The motivations of freelancers and their clients reveal a shared desire for flexibility



France



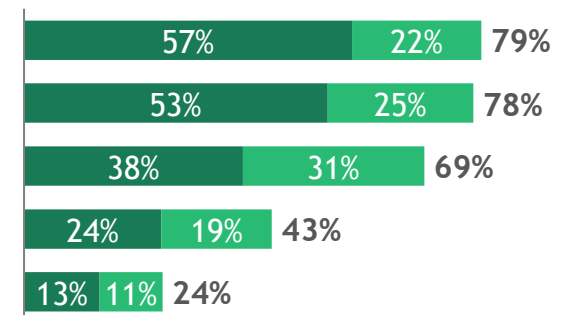
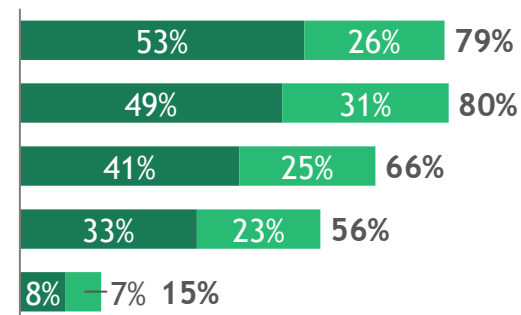
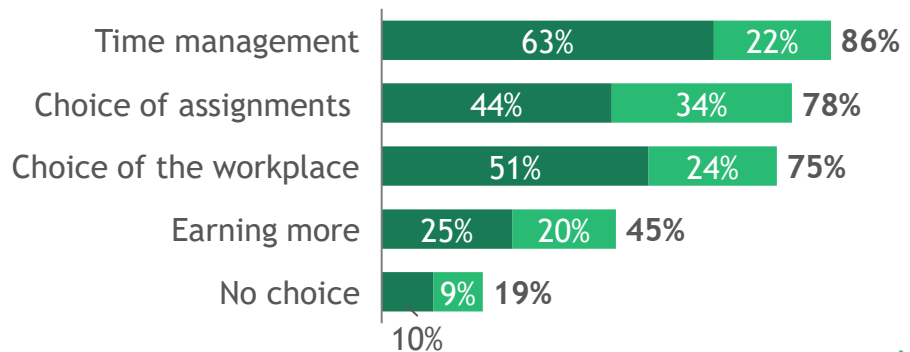
Germany



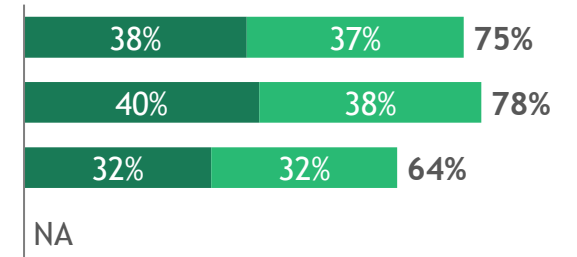
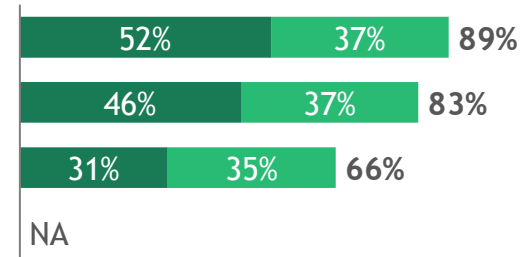
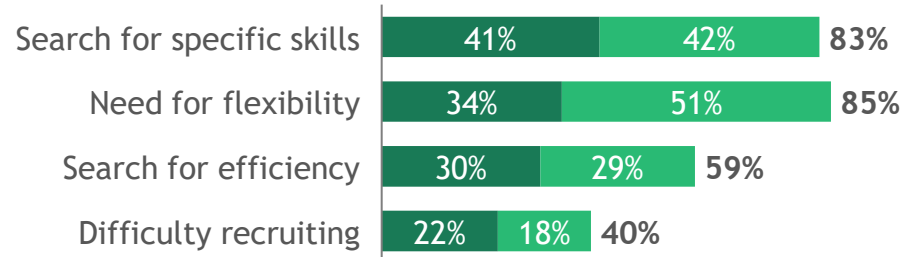
Spain

■ Important
■ Very important

Main motivations of freelancers



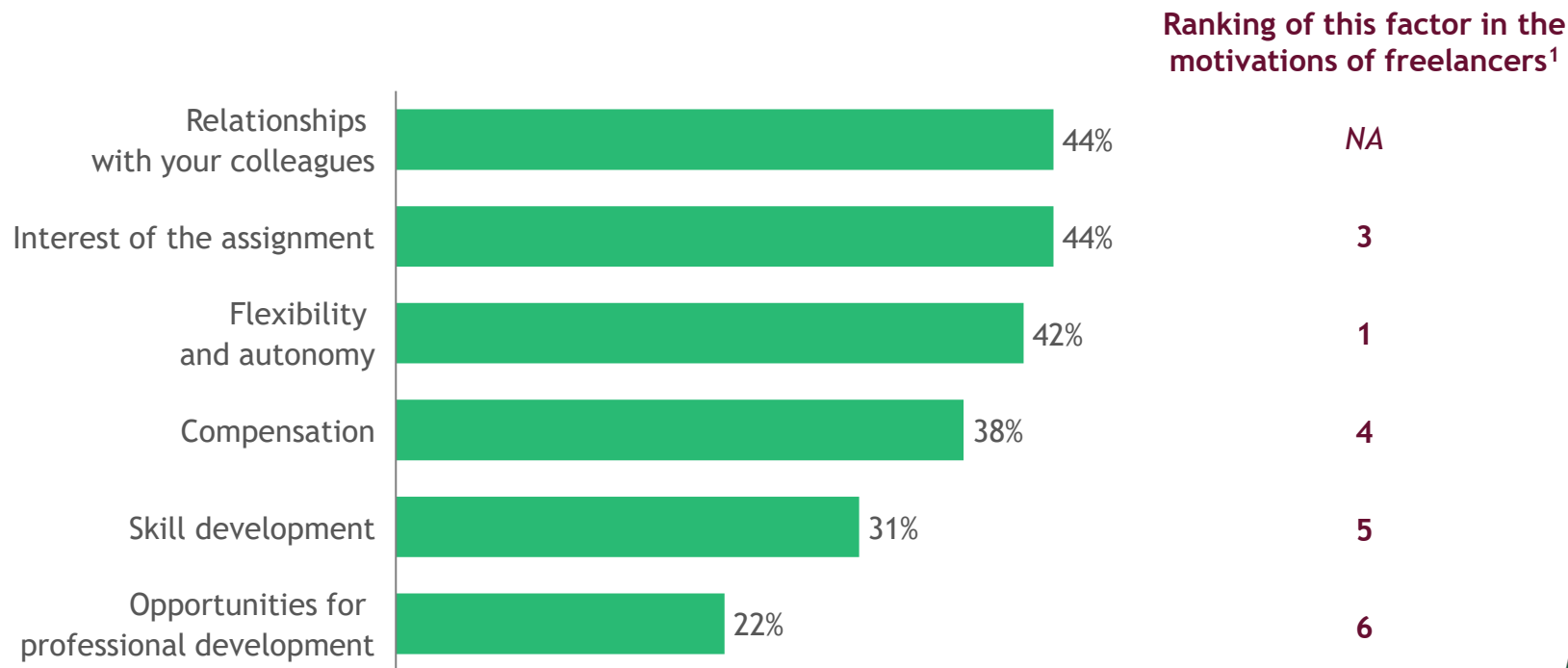
Main client needs according to freelancers



Questions asked : I chose to become a freelancer to... [rate each criterion from 1 (not important) to 5 (very important)] / Clients work with freelancers to... [rate from 1 to 5] For each factor, the proportion of respondents who rated 4 (important) or 5 (very important) was specified
 Source : Malt / BCG survey (May-June 2020) - 2,324 respondents (1,465 in France, 494 in Spain, 365 in Germany)

Geeks, like freelancers, value the flexibility made possible by their jobs

Most important elements of working life according to geeks surveyed



Geeks stress the importance of "**relationships with colleagues**". Freelancers, who usually work alone, do not raise this point

Geeks, who are generally salaried employees, do not mention the **choice of workplace** as an important criterion, while it is essential for freelancers

Geek: person working in the IT and digital sector

Question: What are the most important elements in your professional life (% of responses mentioning this factor)?

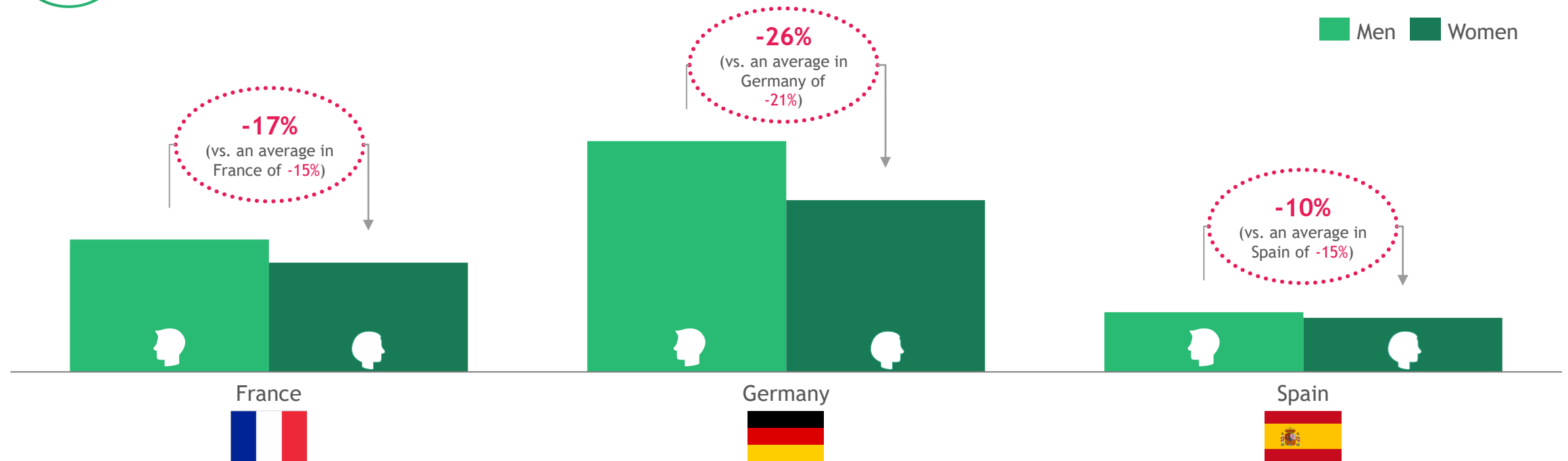
French freelancers only - These factors were presented to freelancers via 2 questions (1- I chose to become a freelancer for... and 2 - I choose one assignment over another for...). Ranking according to % of respondents who indicated this factor as "very important". Factor #2 would have been the choice of the workplace

Source : BCG ViaVoice survey, Dans la tête d'un Geek (4/9 - 2/10 2018, 732 respondents from all over the world)

Their compensation is in line with that of highly qualified executives, but there are still significant differences between men and women



Gender pay gap by country



NB: The gap between men & women exists, across all activities and seniority level. Thus, those are not factors explaining the gap (cf. appendix)

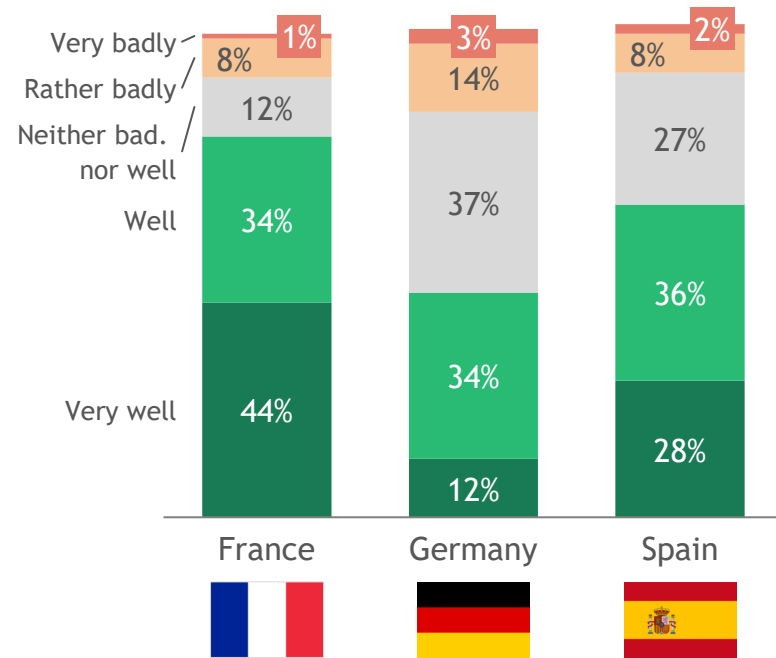
Question asked: What is your daily rate?

Average monthly salary calculated on the basis of 14 days worked in the month, billed at the average daily rate of each country (all professions).

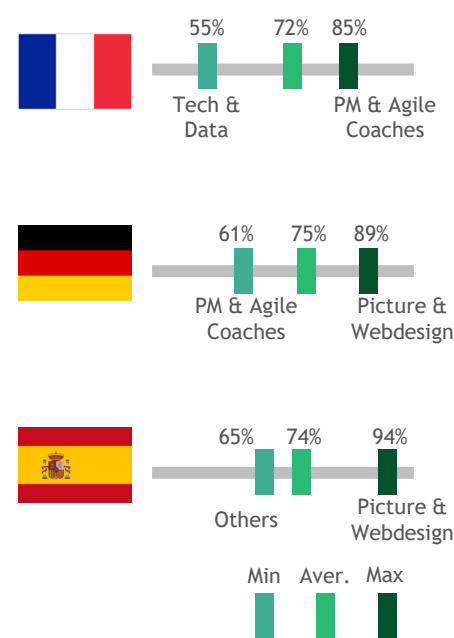
Source : Malt / BCG survey (May-June 2020) - 2,324 respondents (1,465 in France, 494 in Spain, 365 in Germany) / Inégalités.fr : the gender pay gap in Europe

The health crisis was well experienced by freelancers, despite the resulting cancellations of assignments

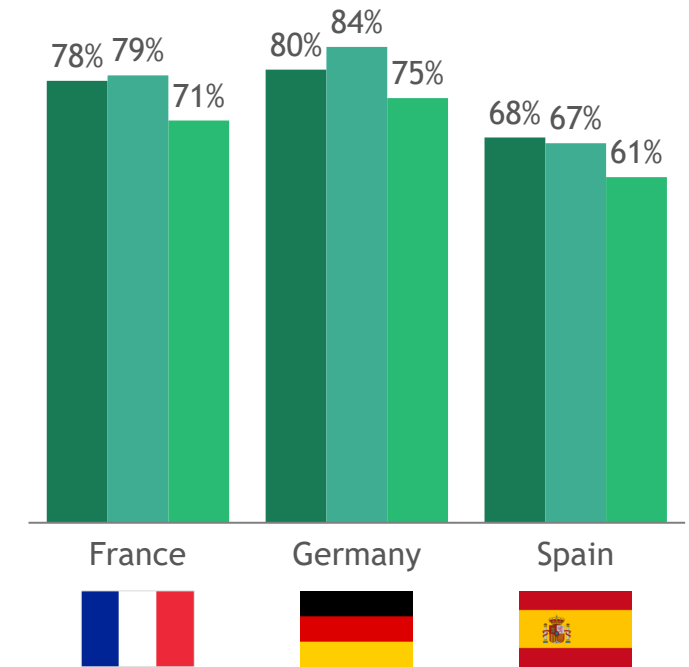
Respondents had a pretty good experience with lockdown



Majority of respondents suffered from assignment cancellations



They are overwhelmingly uncertain about the future



In France, about 70% said that:

- Lockdown had no impact on their productivity
- Communication with their clients went well

Despite crisis, 84% of freelances surveyed don't plan to go back to a salaried job

- By 12 months
- 12-18 months
- 5 years

Question asked: How do you experience being locked down at home? Have you had one or more assignments cancelled because of the crisis? Are you confident about your freelance activity? (uncertainty: sum of 2/3/4 grades)

Source : Malt / BCG survey (May-June 2020) - 2,324 respondents (1,465 in France, 494 in Spain, 365 in Germany)

Appendix

Characteristics of the French panel, by activity

	Picture/ Sound & Web Graphic Design	Tech & Data	Comm & Marketing	Other	Project Managers & Agile Coaches	Business Consulting
Weight in the panel	29%	29%	23%	7%	7%	5%
Feminization	53%	9%	74%	73%	41%	37%
Average age	35.3	34.8	36.6	41.3	39.6	42.7
Average seniority	6.46	4.50	4.81	4.17	3.90	5.13
Former employees	89%	93%	93%	94,5%	98%	98,5%
Working in Agile ¹	27%	59%	26%	23%	75%	48%
Share of home office	64%	54%	72%	53%	31%	42%
Weekly training time (h)	4,2	5,1	3,5	3,9	3,4	4,7

1. Sum of "a lot" and "moderately"

Source : Malt / BCG survey (May-June 2020) - 2,324 respondents (1,465 in France, 494 in Spain, 365 in Germany)



Characteristics of the German panel, by activity

	Picture/ Sound & Web Graphic Design	Tech & Data	Comm & Marketing	Other	Project Managers & Agile Coaches	Business Consulting
Weight in the panel	19%	24%	14%	8%	18%	16%
Feminization	51%	6%	52%	32%	13%	17%
Average age	38.9	43.5	42.2	48.3	49.4	49.1
Average seniority	9.17	9.26	7.25	9.59	9.38	8.81
Former employees	81%	92%	94%	100%	95%	96%
Working in Agile ¹	37%	57%	29%	37%	63%	43%
Share of home office	53%	45%	58%	37%	32%	40%
Weekly training time (h)	5,2	4,6	3,7	3,7	5,0	5,5

1. Sum of "a lot" and "moderately"

Source : Malt / BCG survey (May-June 2020) - 2,324 respondents (1,465 in France, 494 in Spain, 365 in Germany)



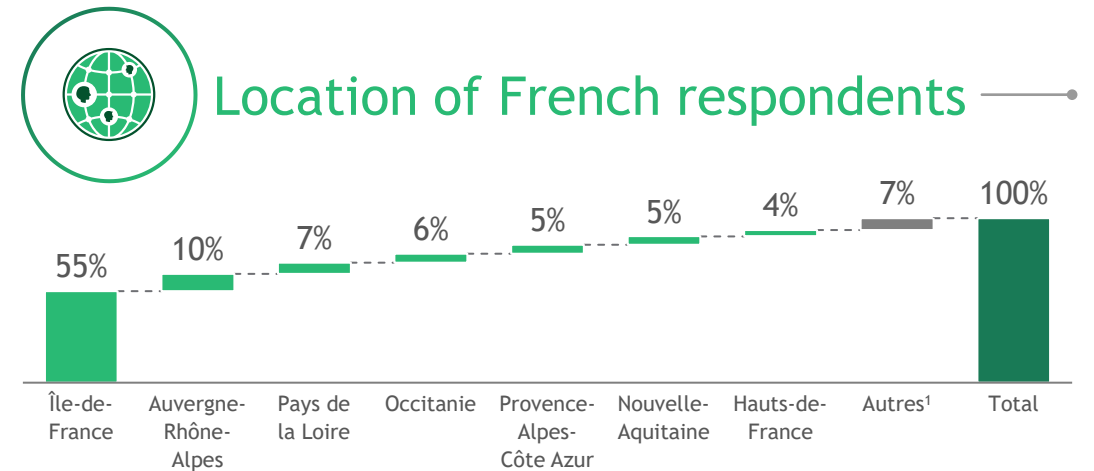
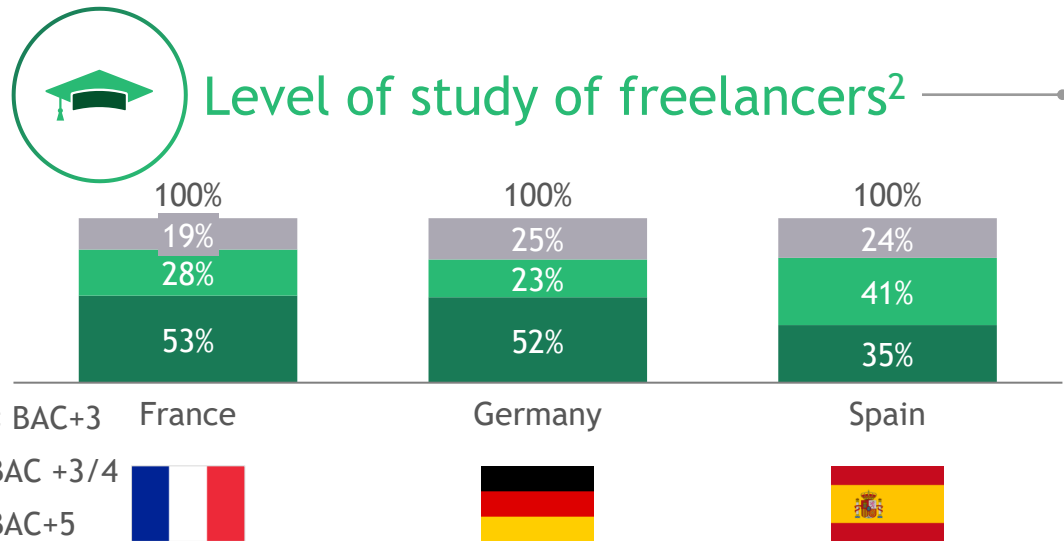
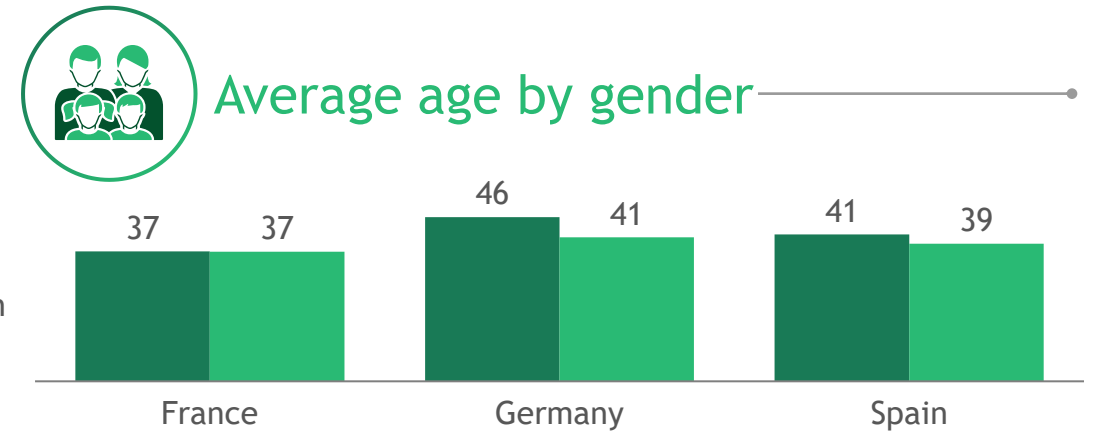
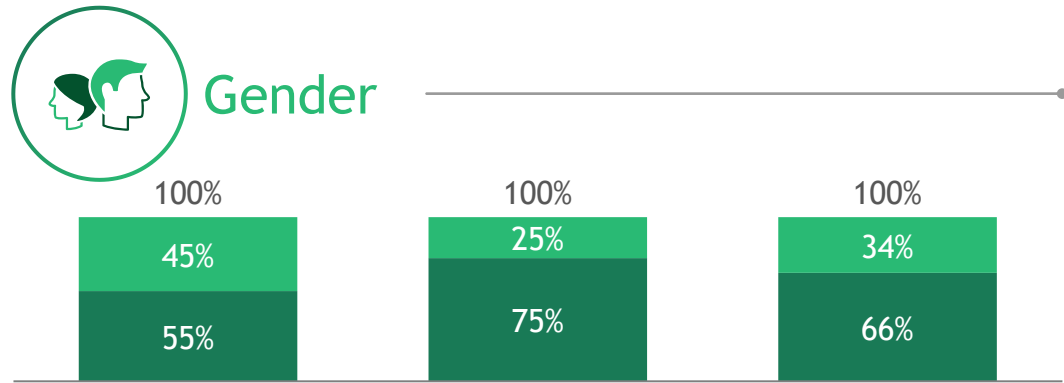
Characteristics of the Spanish panel, by activity

	Picture/ Sound & Web Graphic Design	Tech & Data	Comm & Marketing	Other	Project Managers & Agile Coaches	Business Consulting
Weight in the panel	38%	27%	21%	5%	4%	6%
Feminization	35%	7%	65%	46%	24%	41%
Average age	39.6	40.4	39.2	42.9	45.5	44.7
Average seniority	6.68	5.76	5.03	5.18	5.61	5.30
Former employees	96%	99%	95%	100%	100%	96,5%
Working in Agile ¹	18%	45,5%	18%	25%	81%	32%
Share of home office	69%	72%	74%	64%	56%	55%
Weekly training time (h)						

1. Sum of "a lot" and "moderately"

Source : Malt / BCG survey (May-June 2020) - 2,324 respondents (1,465 in France, 494 in Spain, 365 in Germany)

The population surveyed is mixed, young, highly qualified, and concentrated in the main employment areas

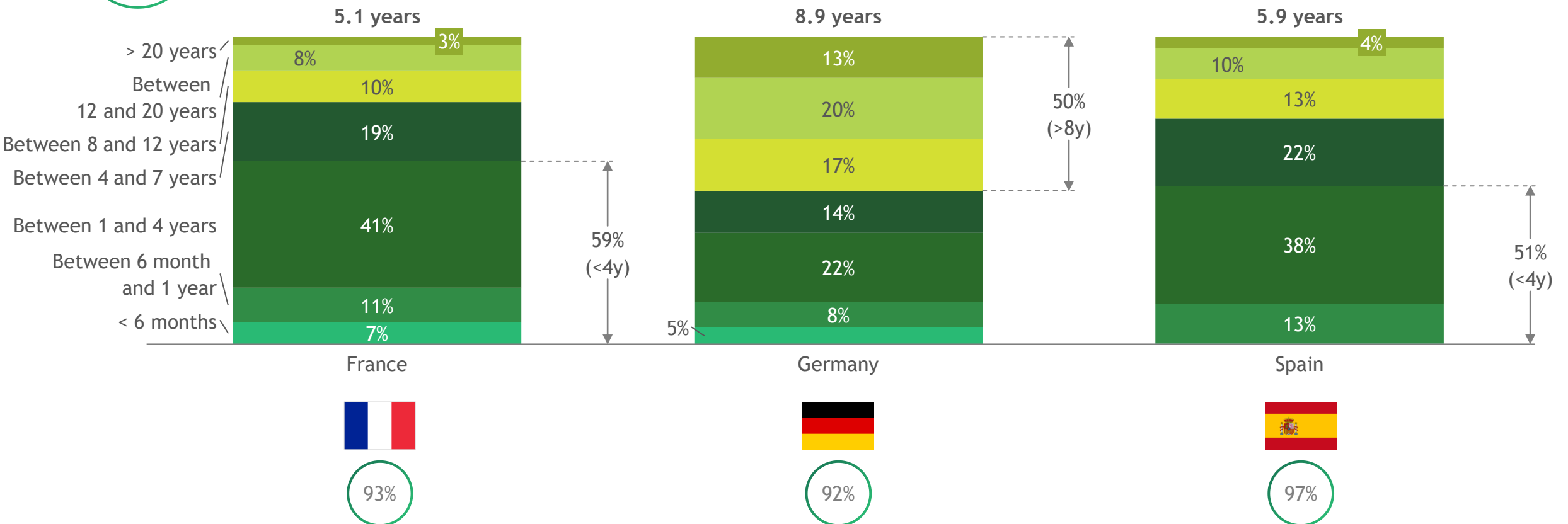


1. "Others" includes : Grand Est, Bretagne, Bourgogne-Franche-Comté, Normandie & Martinique
 2. Freelancers with (in France) a Bac +3 or more (or equivalent in Germany/Spain) are considered to be highly qualified
 Source : Malt / BCG survey (May-June 2020) - 2,324 respondents (1,465 in France)


With the exception of Germany, their freelancing experience is generally recent, almost all of them have been salaried employees



Freelancing seniority (on average and per bracket)



Question asked: How long have you been freelancing??
 Source : Malt / BCG survey (May-June 2020) - 2,306 respondents

 Freelancers with employment experience

According to freelancers, clients mainly value their specific skills, the flexibility of their services and their efficiency

Main client needs according to freelancers



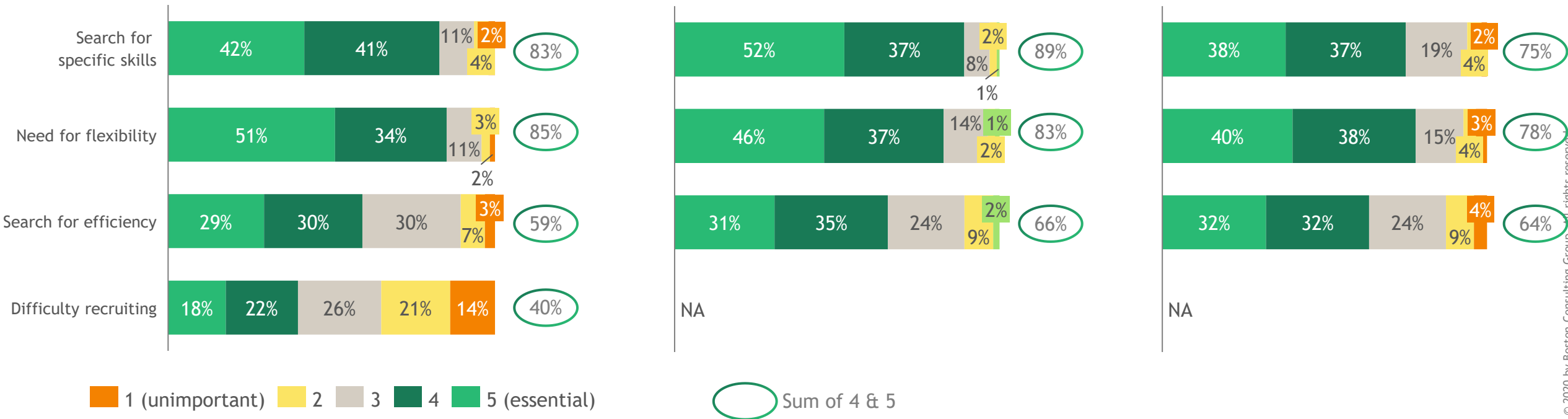
France



Germany



Spain



For each type of client need, the respondents estimated the level of importance for the client (from 1, unimportant to 5, essential).
 Source : Malt / BCG survey (May-June 2020) - 2,306 respondents

ID card of surveyed sample



Hommes



Femmes

Average age

36.6 years

36.5 years

Average number of years working as freelancers

5.2 years

4.9 years

>8 ans 4 à 8 ans <4 ans



Proportion of BAC+3 and higher

77%

86%

BAC+5 BAC+3/4 < BAC+3

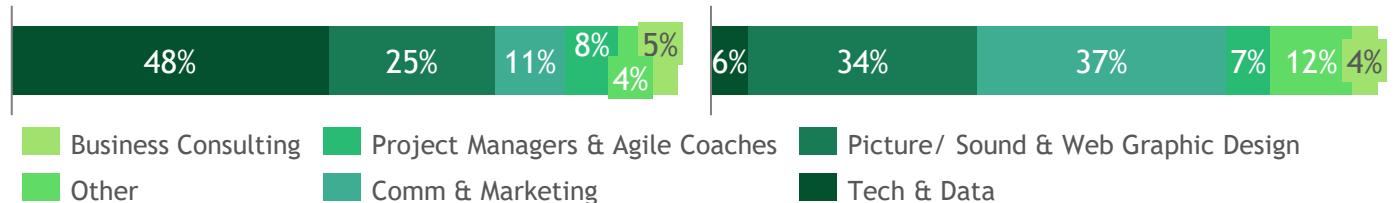


Proportion of former salaried employees

94%

91%

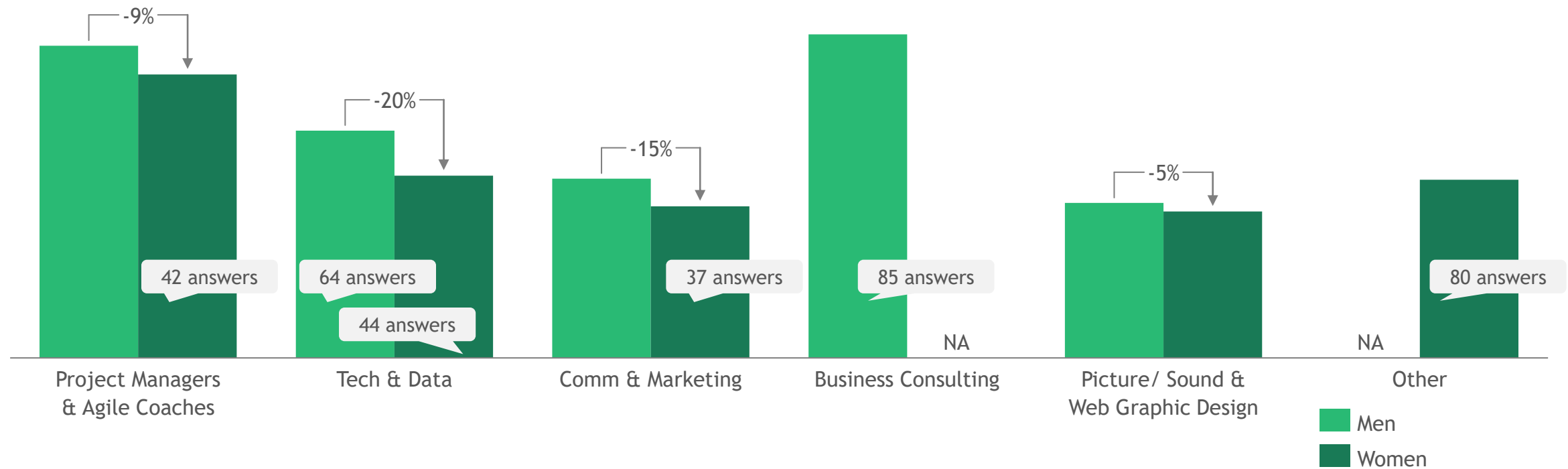
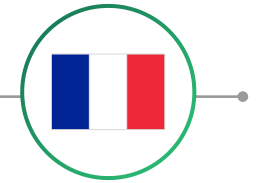
Split by job type



The magnitude of the gap varies greatly from one profession to another



Pay gaps between men and women in France by profession



Question asked: What is your daily rate?

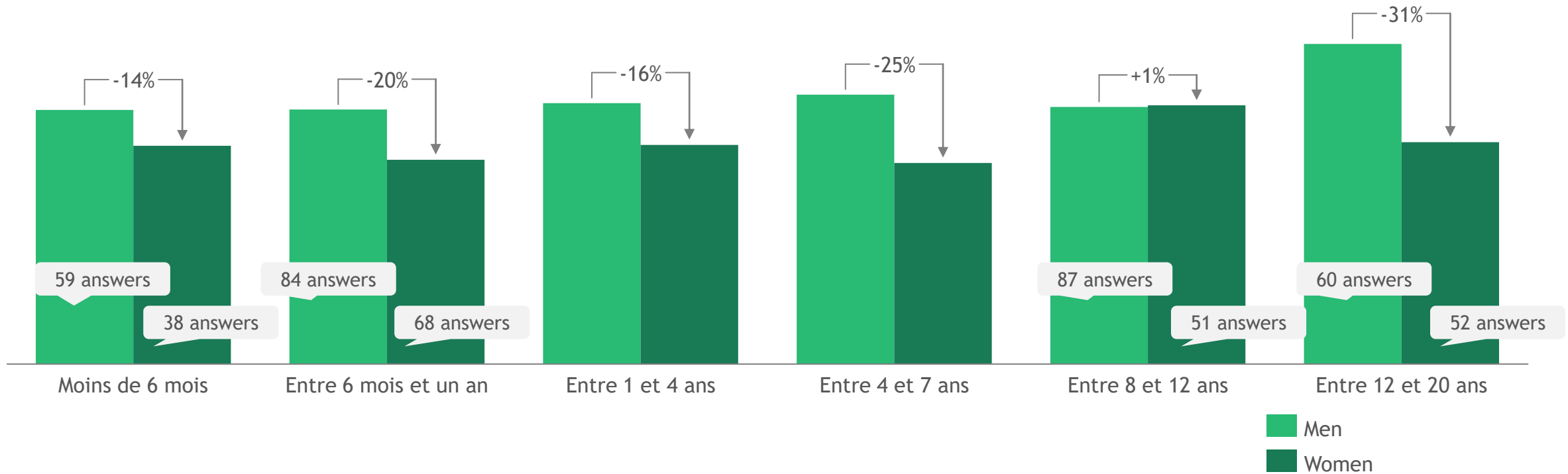
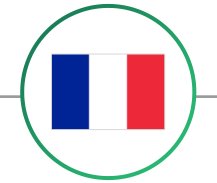
Average monthly salary calculated on the basis of 14 days worked in the month, billed at the average daily rate of each country (all professions and genders combined)

Source : Malt / BCG survey (May-June 2020)- 1,465 French respondents

The magnitude of the gap is highly variable depending on freelancing seniority



Pay gaps between men and women in France according to freelancing seniority



Question asked: What is your daily rate?

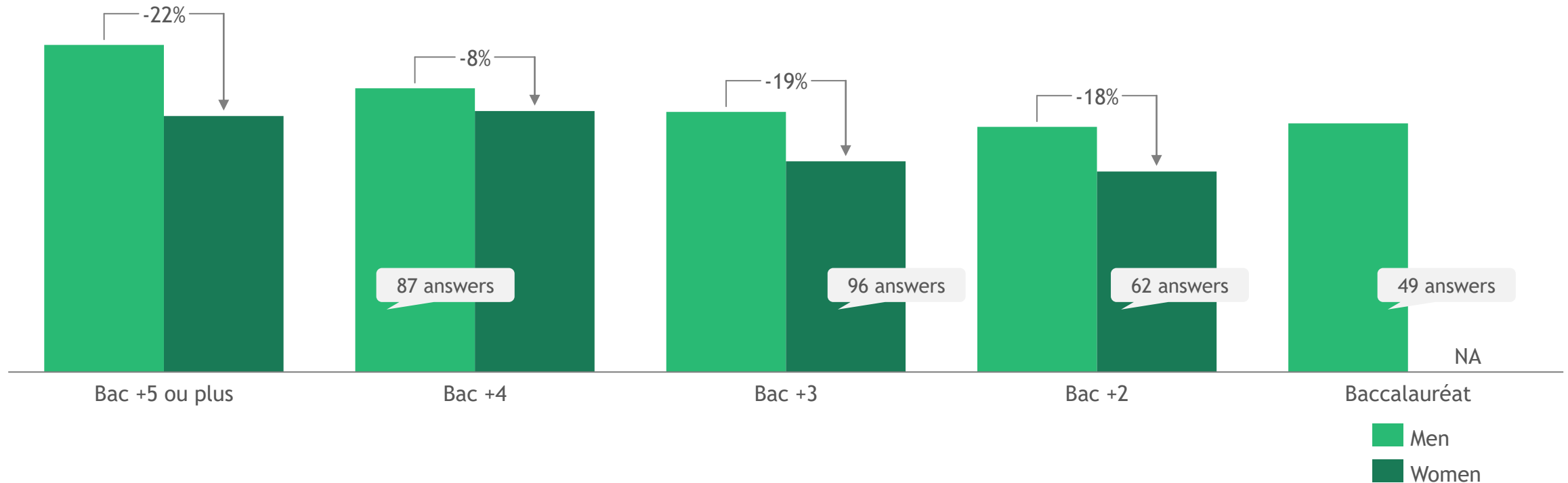
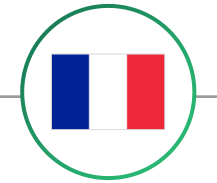
Average monthly salary calculated on the basis of 14 days worked in the month, billed at the average daily rate of each country (all professions and genders combined)

Source : Malt / BCG survey (May-June 2020)- 1,465 French respondents

The magnitude of the gap is highly variable depending on the highest degree obtained



Pay gaps between men and women in France according to degree



Question asked: What is your daily rate?

Average monthly salary calculated on the basis of 14 days worked in the month, billed at the average daily rate of each country (all professions and genders combined)

Source : Malt / BCG survey (May-June 2020)- 1,465 French respondents

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