



BOSTON  
CONSULTING  
GROUP

# Digital Freelancers in Europe

*(Focus on France, Germany, Spain)*

Presentation of results

29<sup>th</sup> JUNE 2020



BCG x malt



# 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...<sup>1</sup>

**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...<sup>1</sup>

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...<sup>1</sup>

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%

# Survey methodology

## Methodology

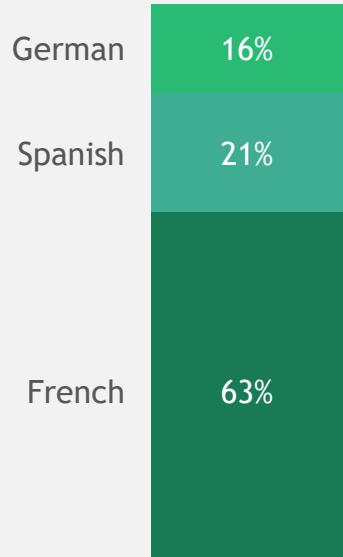
**malt** Survey conducted jointly by **MALT** and **BCG** from May 13 to June 9, 2020

 Panel composed of French, German and Spanish respondents

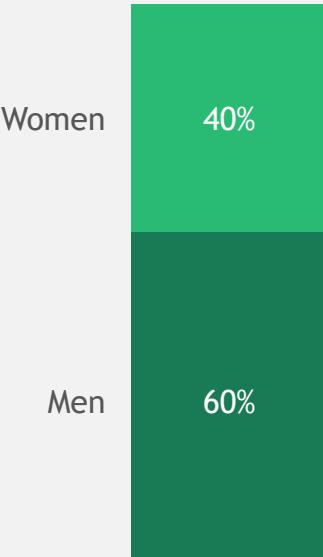
 2,324 responses

## Presentation of the panel

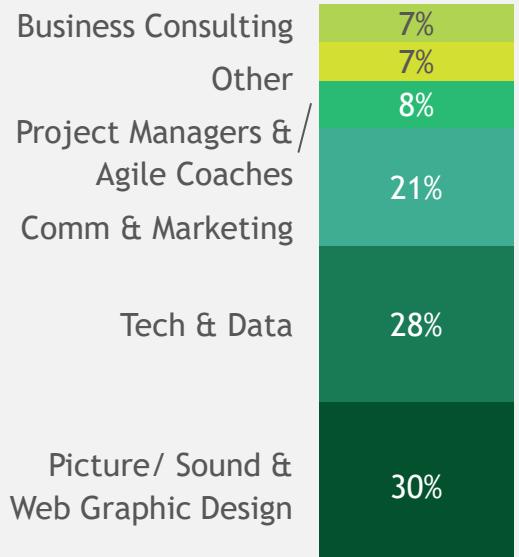
### Nationalities represented



### Breakdown by gender



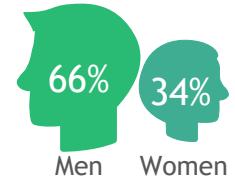
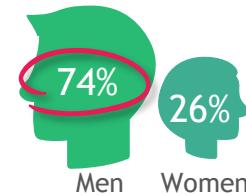
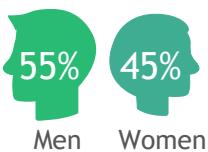
### Activities carried out



# ID of the sample surveyed



## Men / women breakdown



## Average age

37 years

45 years

40 years

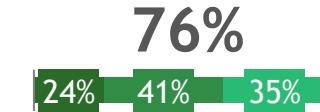
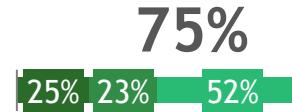
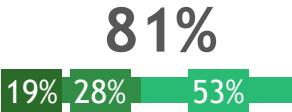
## Average number of years working as freelances

>8 yrs   4 to 8 yrs   <4 yrs



## Proportion of BAC+3 and above

BAC+5   BAC+3/4   < BAC+3



## Proportion of former employees

93%

92%

97%

## Weight of largest employment areas

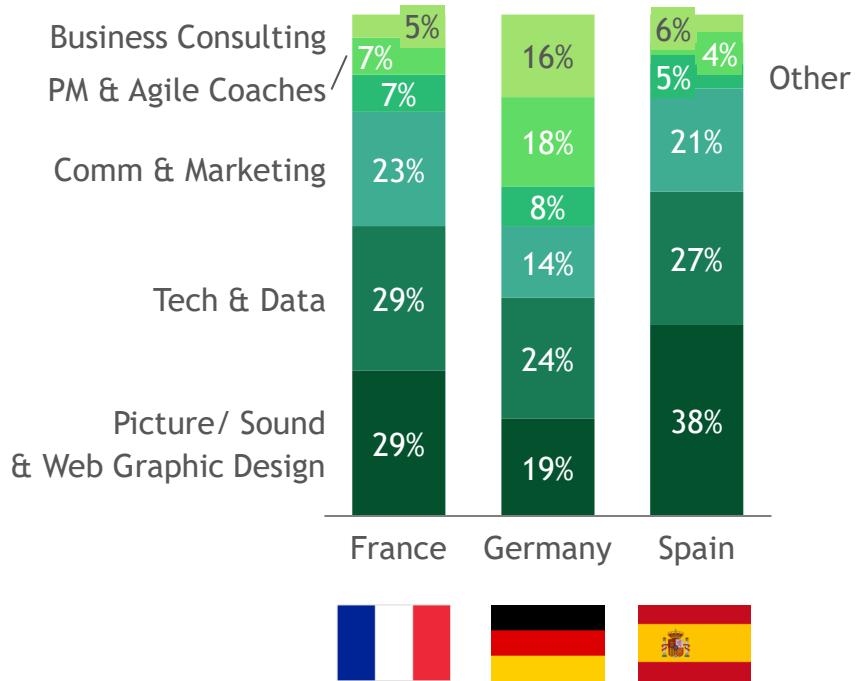
55%  
(Ile de France)

76%  
(Bavaria & Ruhr)

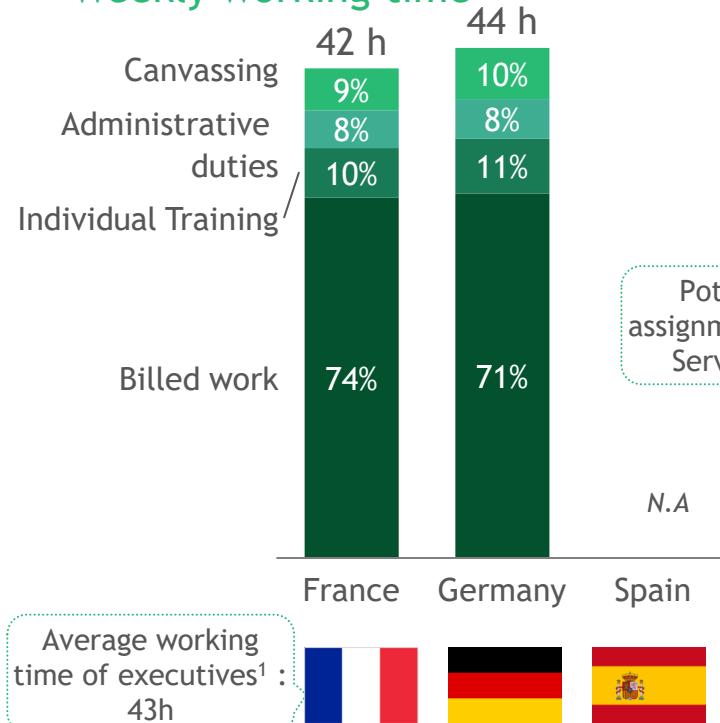
81%  
(Madrid & Catalonia)

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

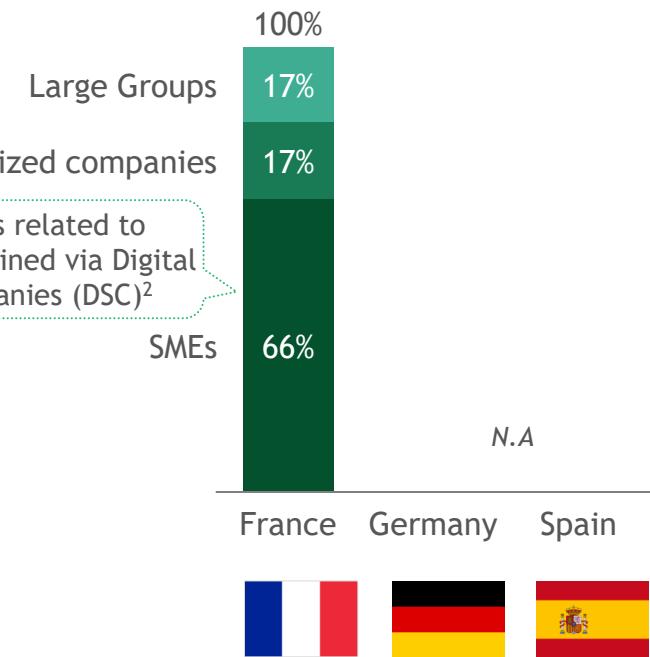
## Breakdown of respondents by profession



## Weekly working time



## Typology of clients



Potential bias related to assignments obtained via Digital Service Companies (DSC)<sup>2</sup>

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]?

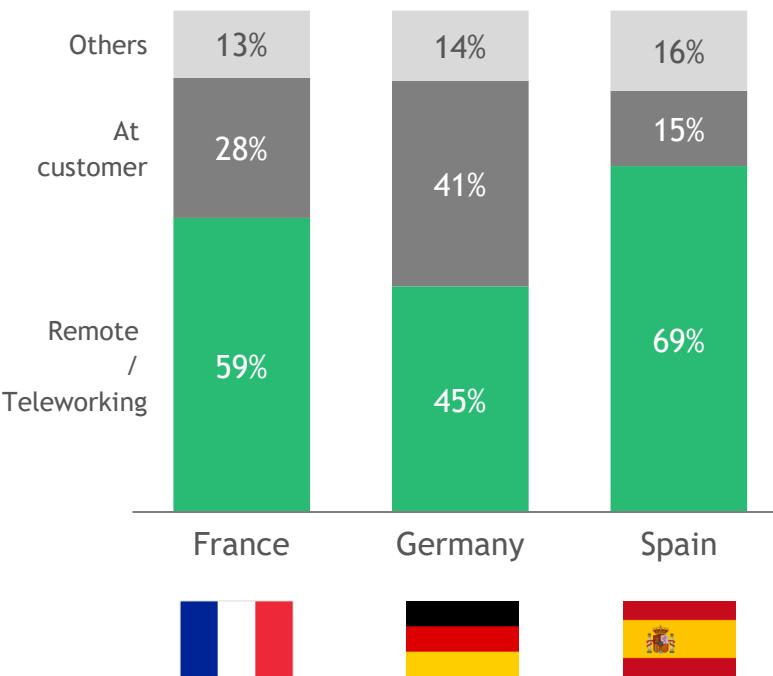
1. CFTC study - Average working time in France (May 2019) 2. When they go through a DSC to deal with a large group, freelancers reported dealing with SMEs

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

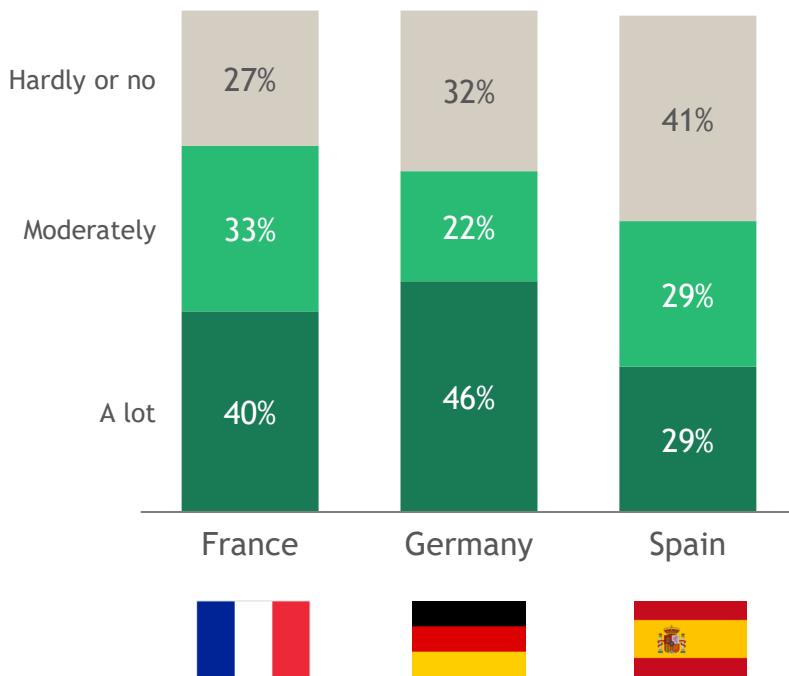
Source : Malt / BCG survey (May-June 2020) - 2,324 respondents (1,465 in France, 494 in Spain, 365 in Germany)

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

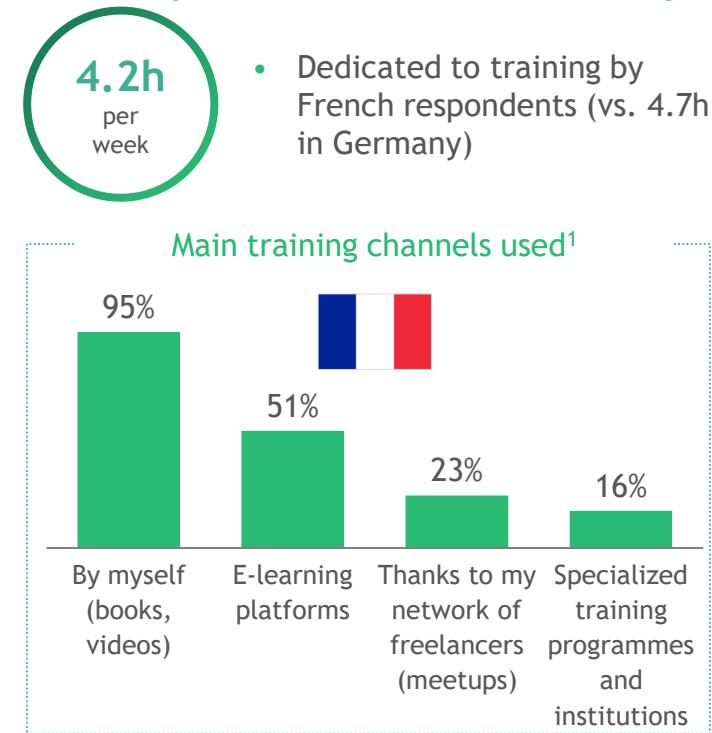
## Workplace (% of time)



## Adoption and frequency of use of Agile ways of working



## Time spent on individual training

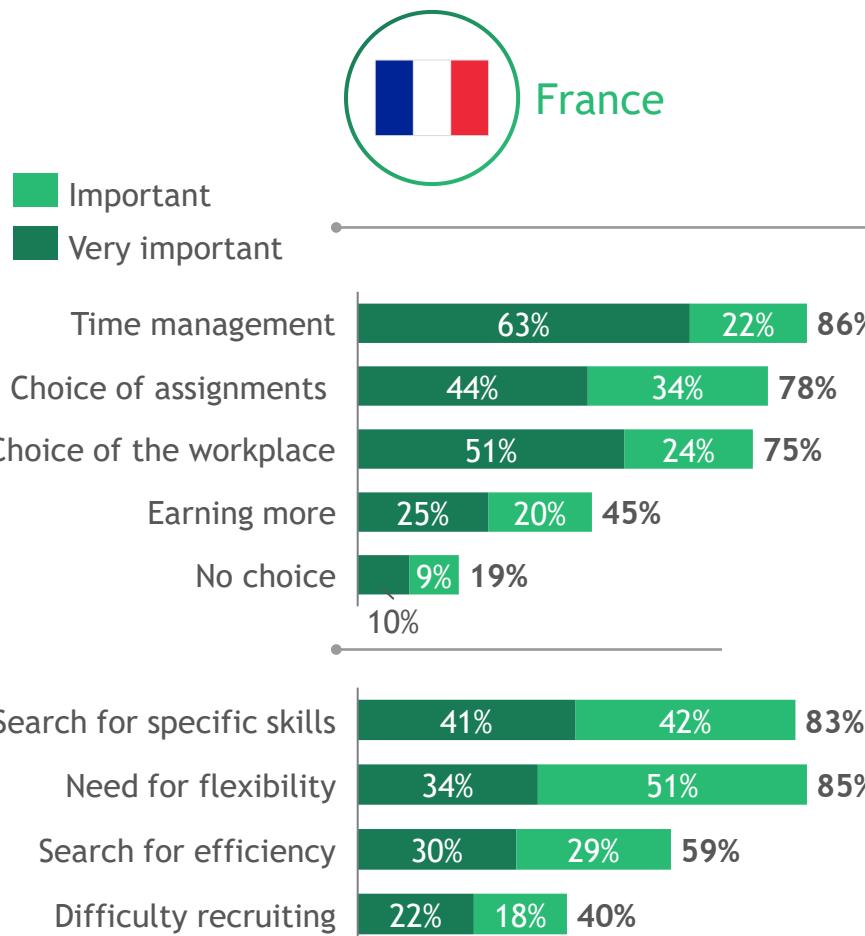


Questions asked: How much of your time do you spend in the following places? What is your level of adoption of agile work methods? How much time per week do you spend on training & what channels do you use?

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)

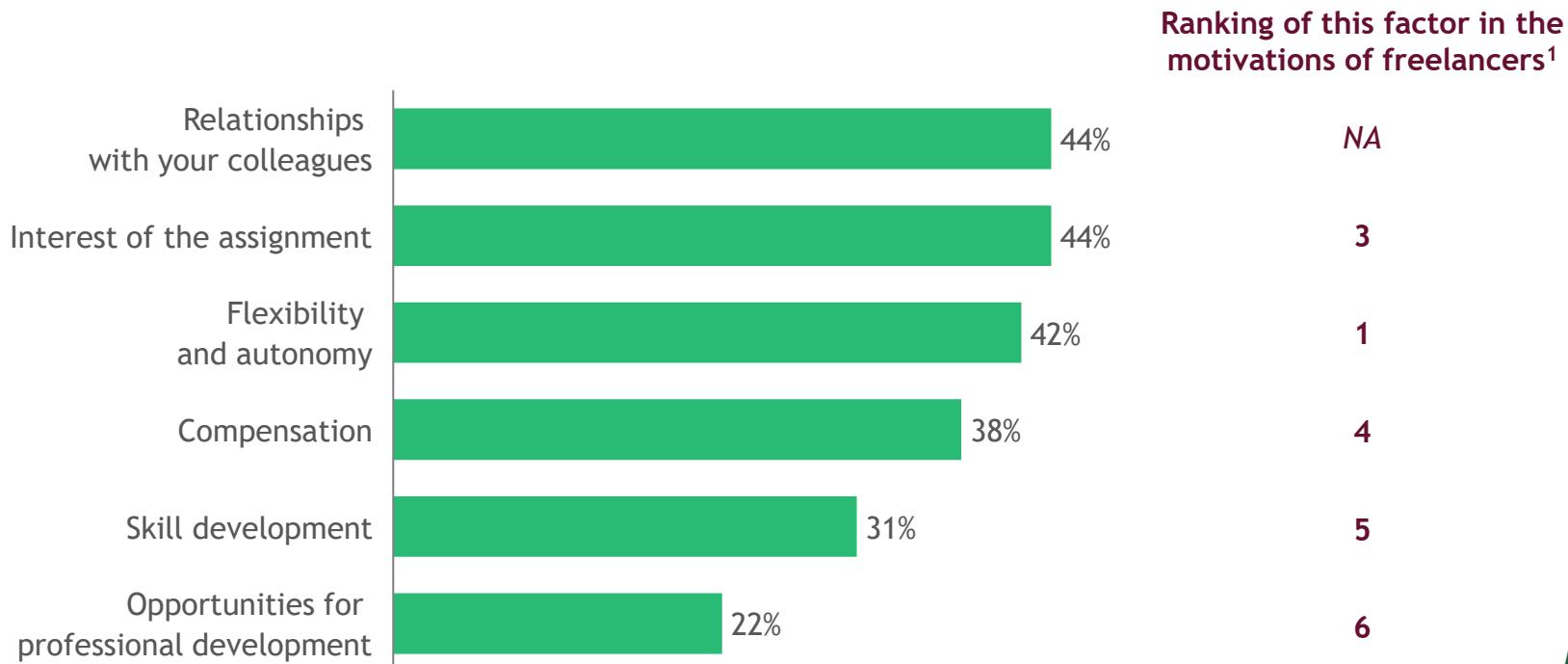
# The motivations of freelancers and their clients reveal a shared desire for flexibility



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



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)

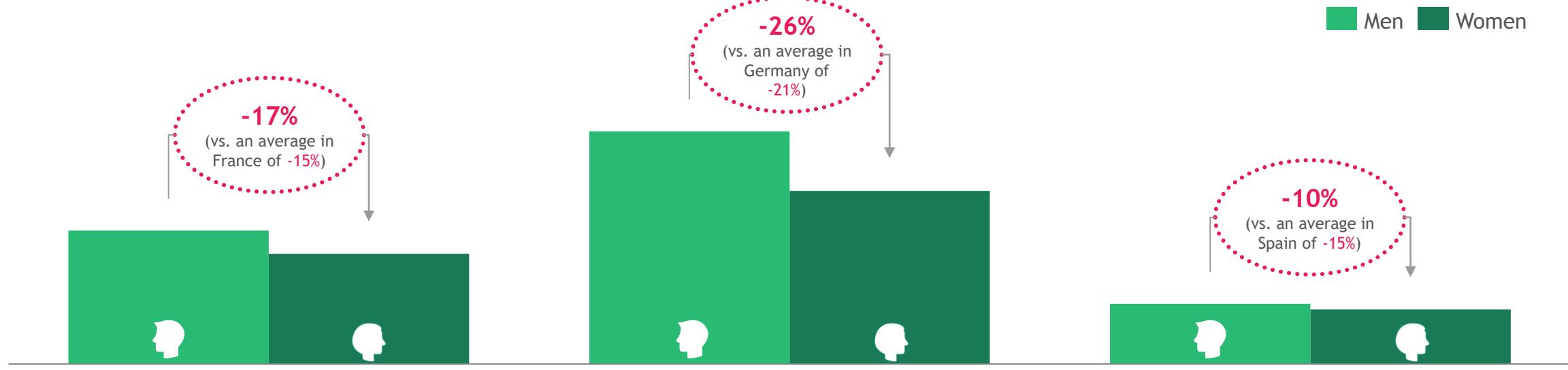
Geeks stress the importance of "**relationships with colleagues**". Freelancers, who usually work alone, do not raise this point

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

# 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)

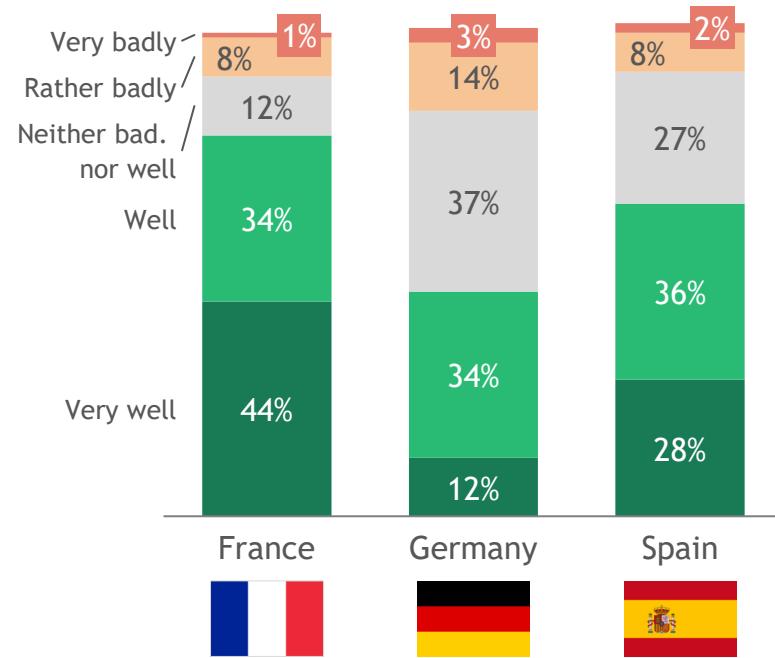
Question asked: What is your daily rate?

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).

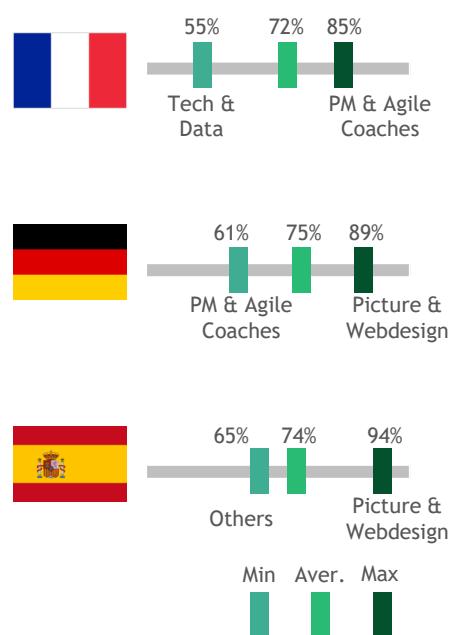
Source : Malt / BCG survey (May-June 2020) - 2,324 respondents (1,465 in France, 494 in Spain, 365 in Germany) / Inégalités.fr : the gender pay gap in Europe

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

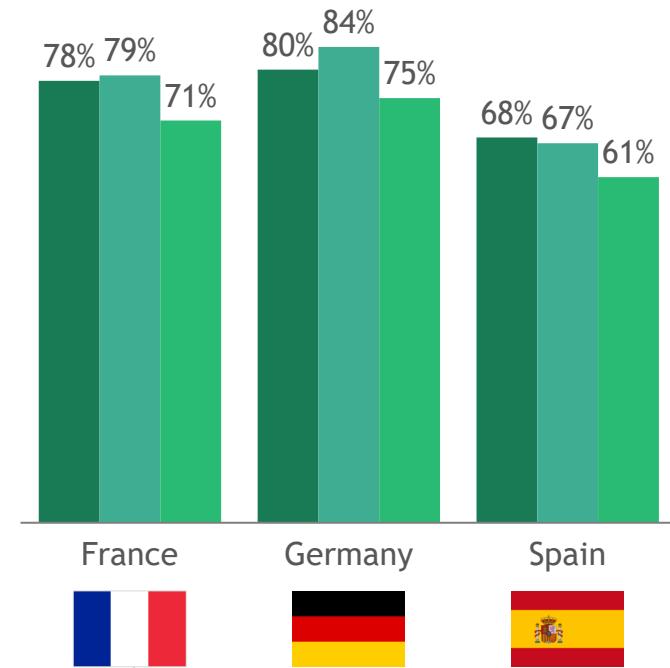
Respondents had a pretty good experience with lockdown



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

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)

By 12 months  
12-18 months  
5 years

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# Appendix



## Characteristics of the French panel, by activity

	Picture / Sound & Web Graphic Design	Tech & Data	Comm & Marketing	Other	Project Managers & Agile Coaches	Business Consulting
<b>Weight in the panel</b>	29%	29%	23%	7%	7%	5%
<b>Feminization</b>	53%	9%	74%	73%	41%	37%
<b>Average age</b>	35.3	34.8	36.6	41.3	39.6	42.7
<b>Average seniority</b>	6.46	4.50	4.81	4.17	3.90	5.13
<b>Former employees</b>	89%	93%	93%	94,5%	98%	98,5%
<b>Working in Agile<sup>1</sup></b>	27%	59%	26%	23%	75%	48%
<b>Share of home office</b>	64%	54%	72%	53%	31%	42%
<b>Weekly training time (h)</b>	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
<b>Weight in the panel</b>	19%	24%	14%	8%	18%	16%
<b>Feminization</b>	51%	6%	52%	32%	13%	17%
<b>Average age</b>	38.9	43.5	42.2	48.3	49.4	49.1
<b>Average seniority</b>	9.17	9.26	7.25	9.59	9.38	8.81
<b>Former employees</b>	81%	92%	94%	100%	95%	96%
<b>Working in Agile<sup>1</sup></b>	37%	57%	29%	37%	63%	43%
<b>Share of home office</b>	53%	45%	58%	37%	32%	40%
<b>Weekly training time (h)</b>	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)



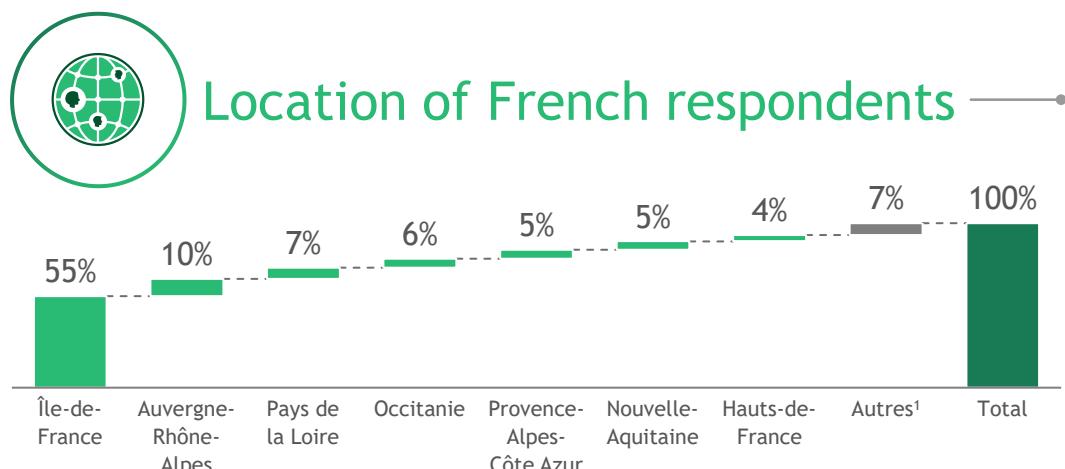
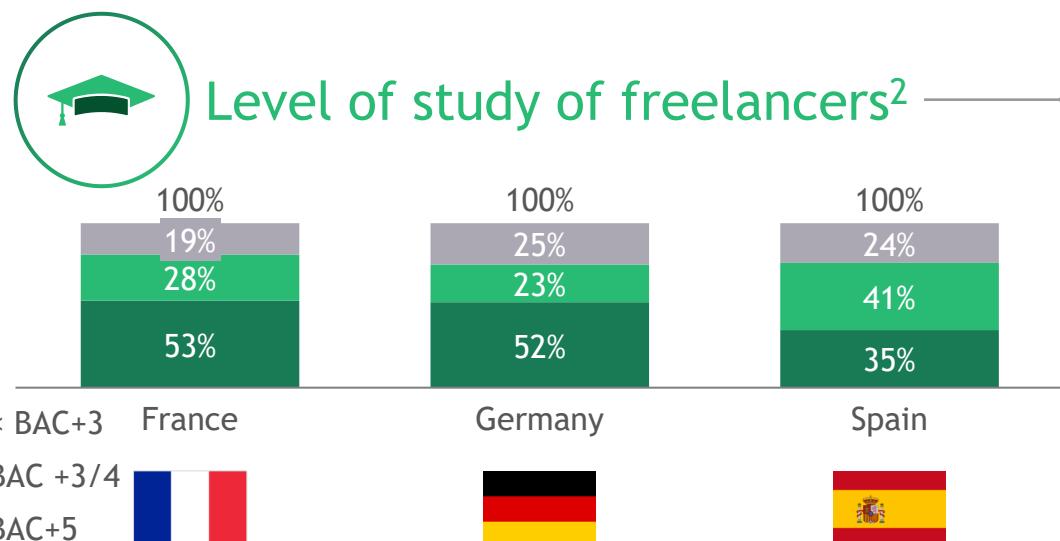
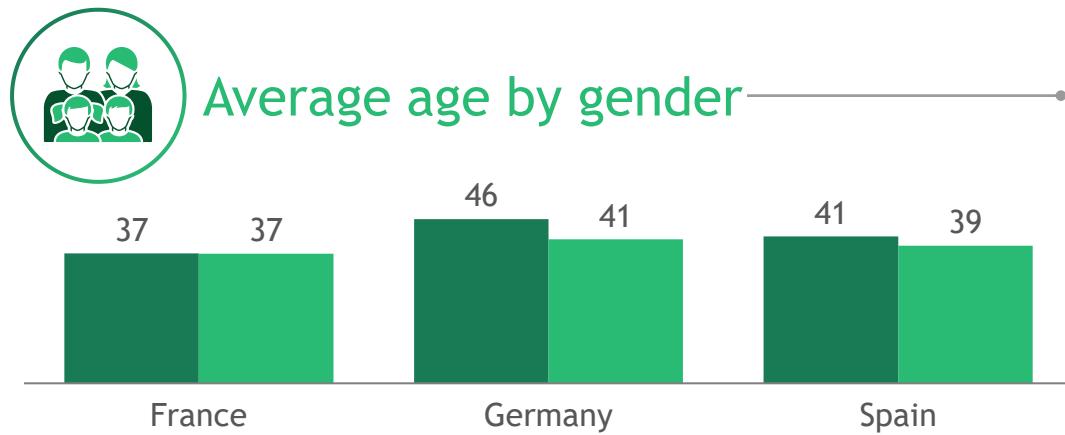
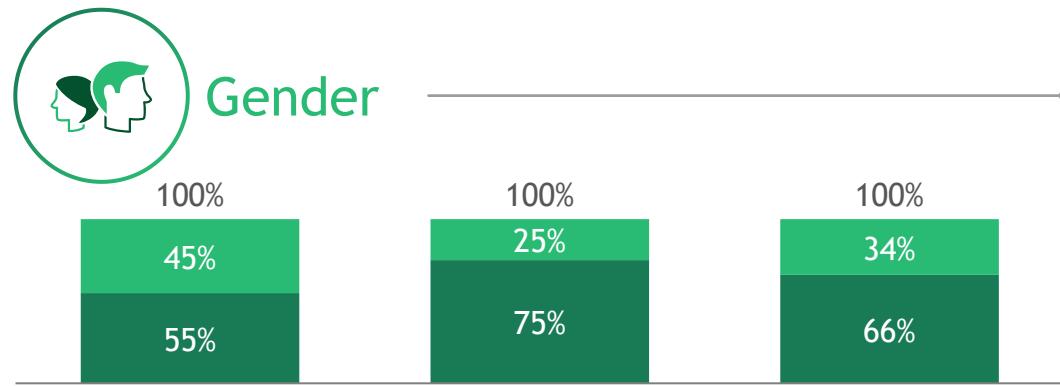
# Characteristics of the Spanish panel, by activity

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

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

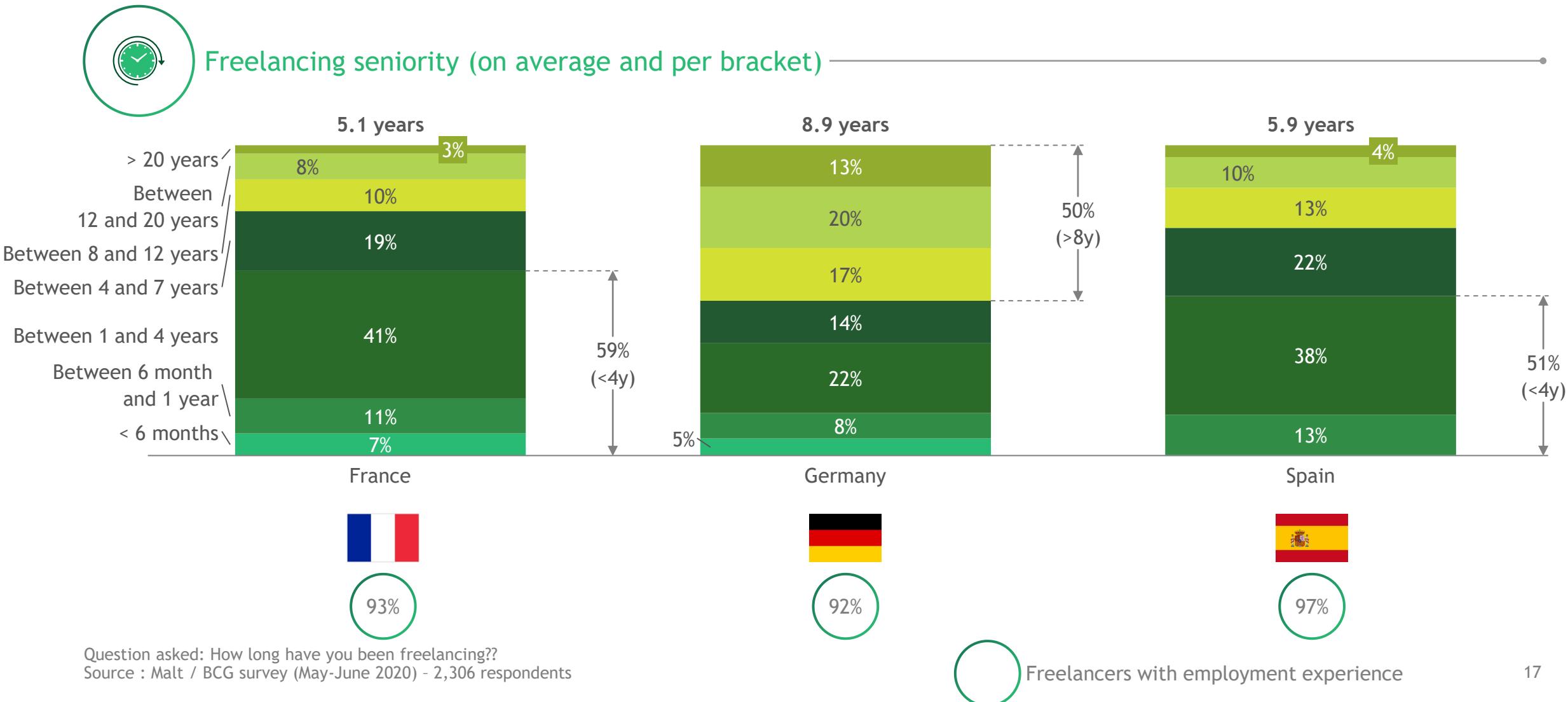


1. "Others" includes : Grand Est, Bretagne, Bourgogne-Franche-Comté, Normandie & Martinique

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



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

## Main client needs according to freelancers



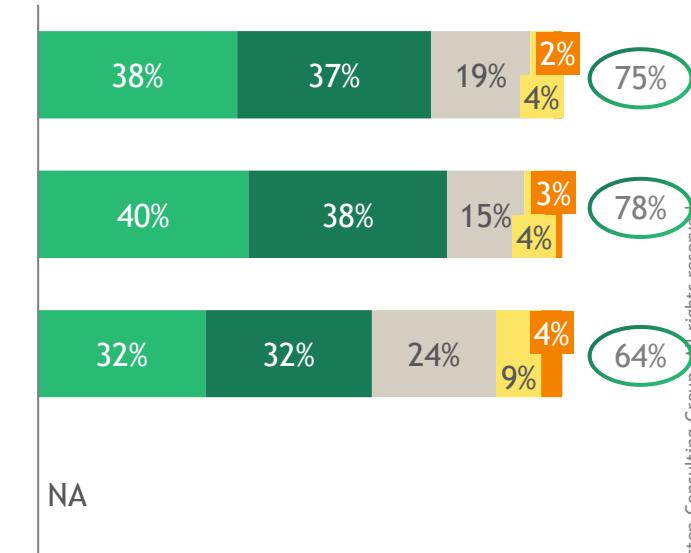
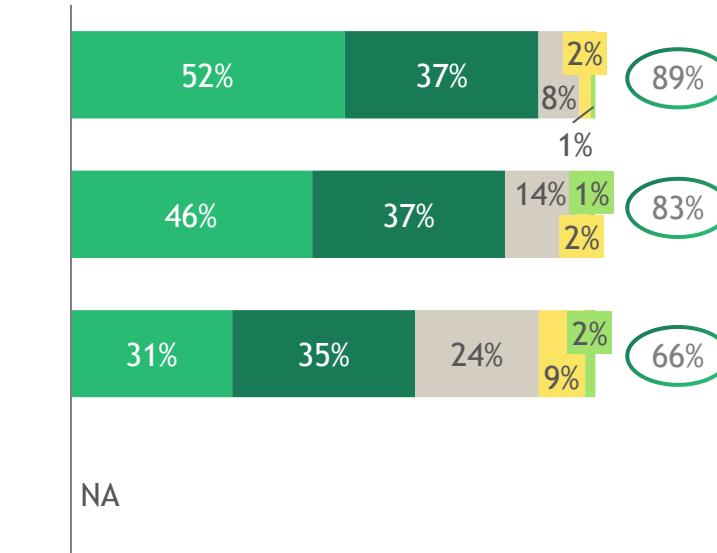
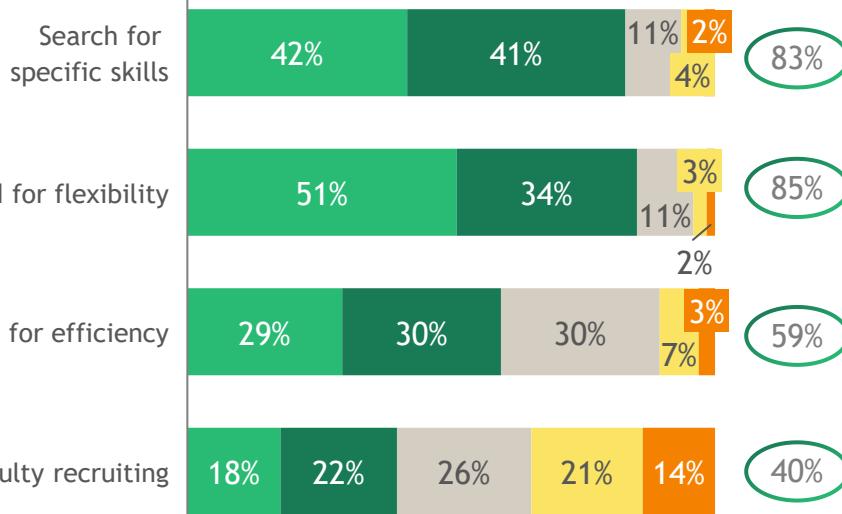
France



Germany



Spain

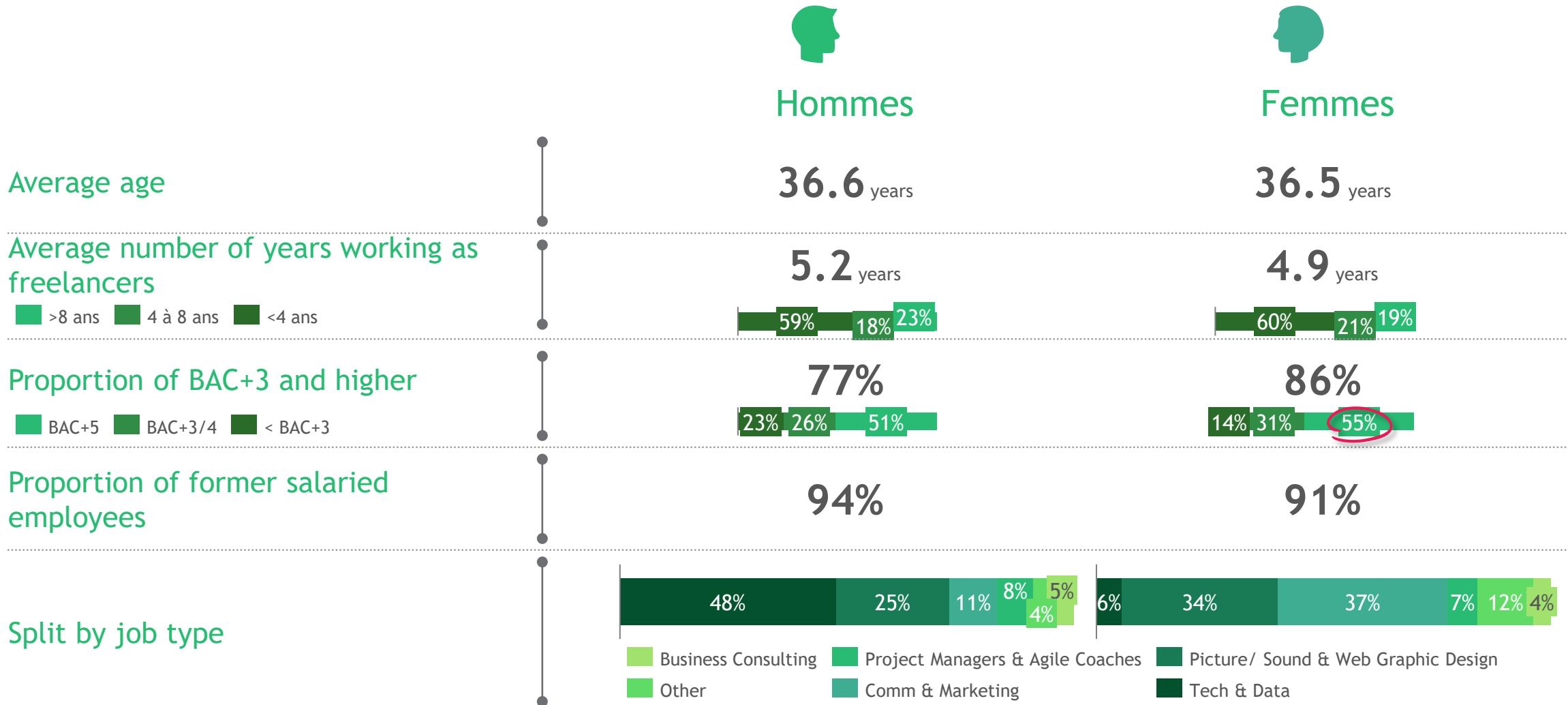


1 (unimportant) 2 3 4 5 (essential)

Sum of 4 & 5

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

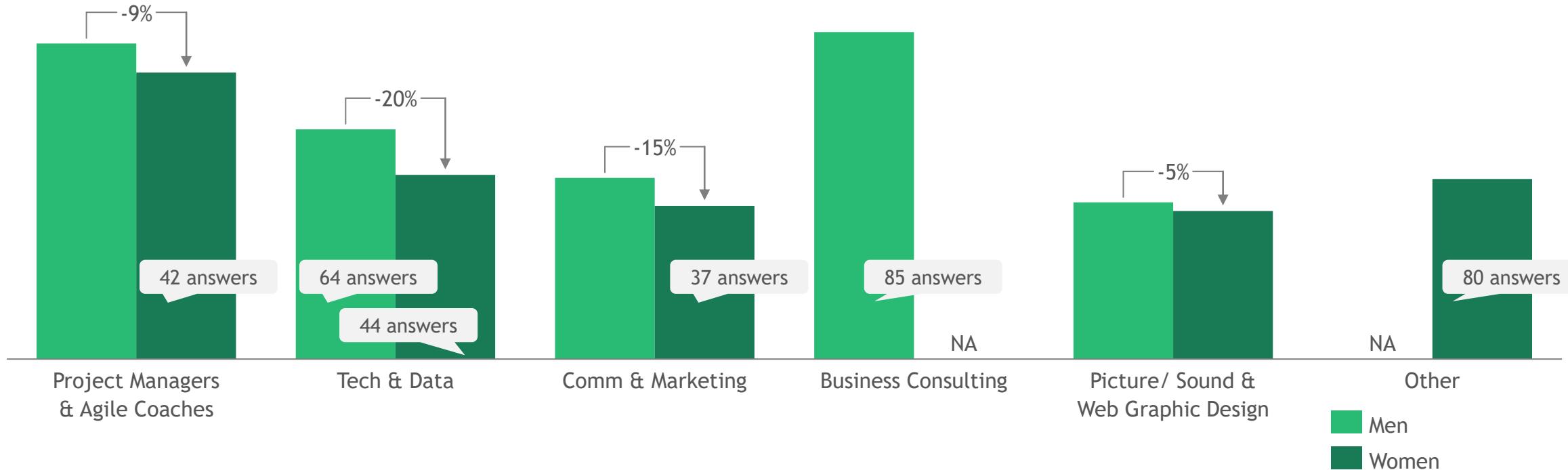
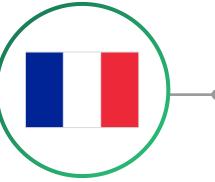
# ID card of surveyed sample



# 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?

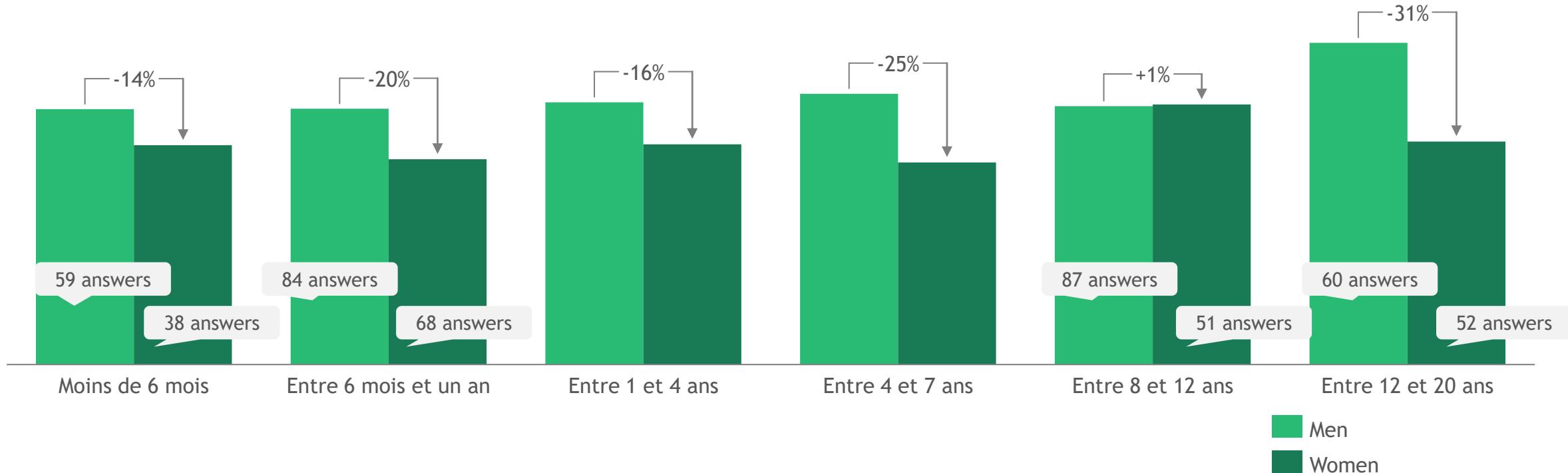
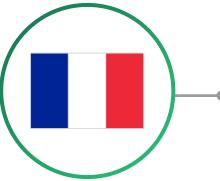
Average monthly salary calculated on the basis of 14 days worked in the month, billed at the average daily rate of each country (all professions and genders combined)

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?

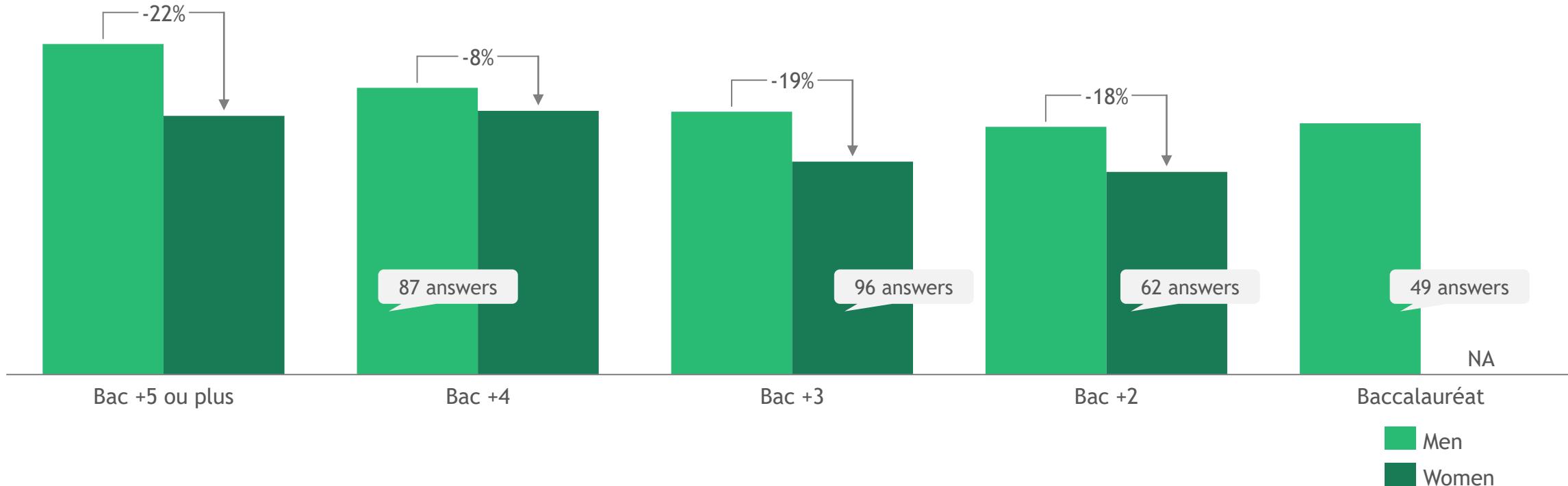
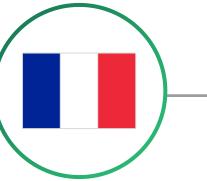
Average monthly salary calculated on the basis of 14 days worked in the month, billed at the average daily rate of each country (all professions and genders combined)

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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