



# Making Work Work Better for Deskless Workers

DECEMBER 2022

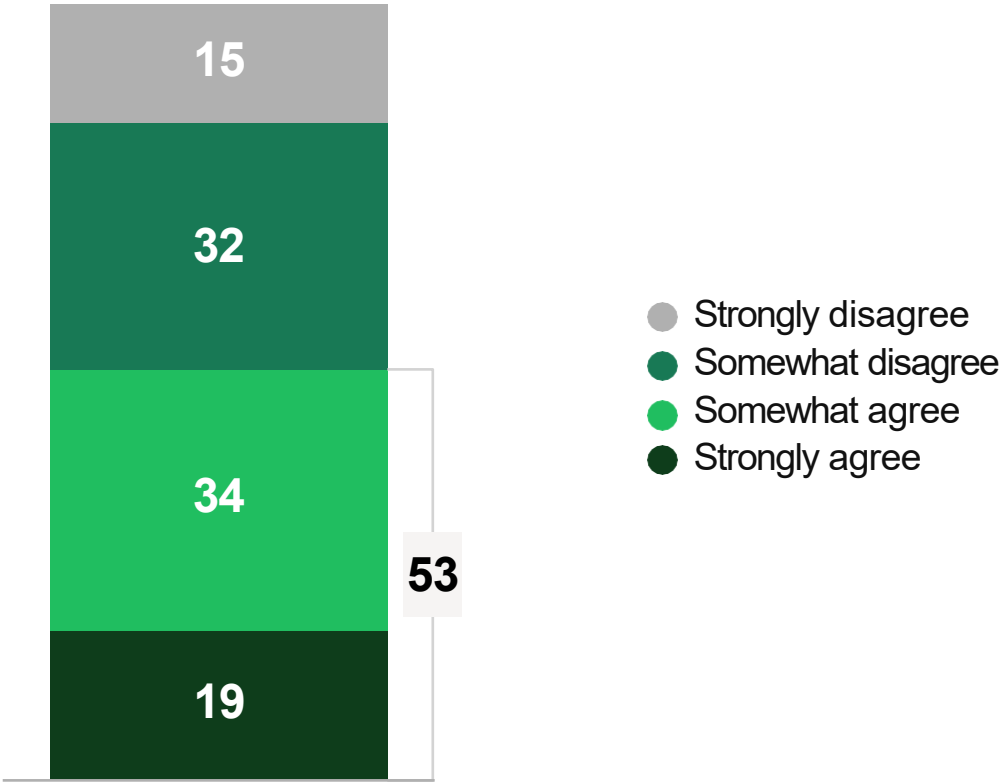


# Messages clés

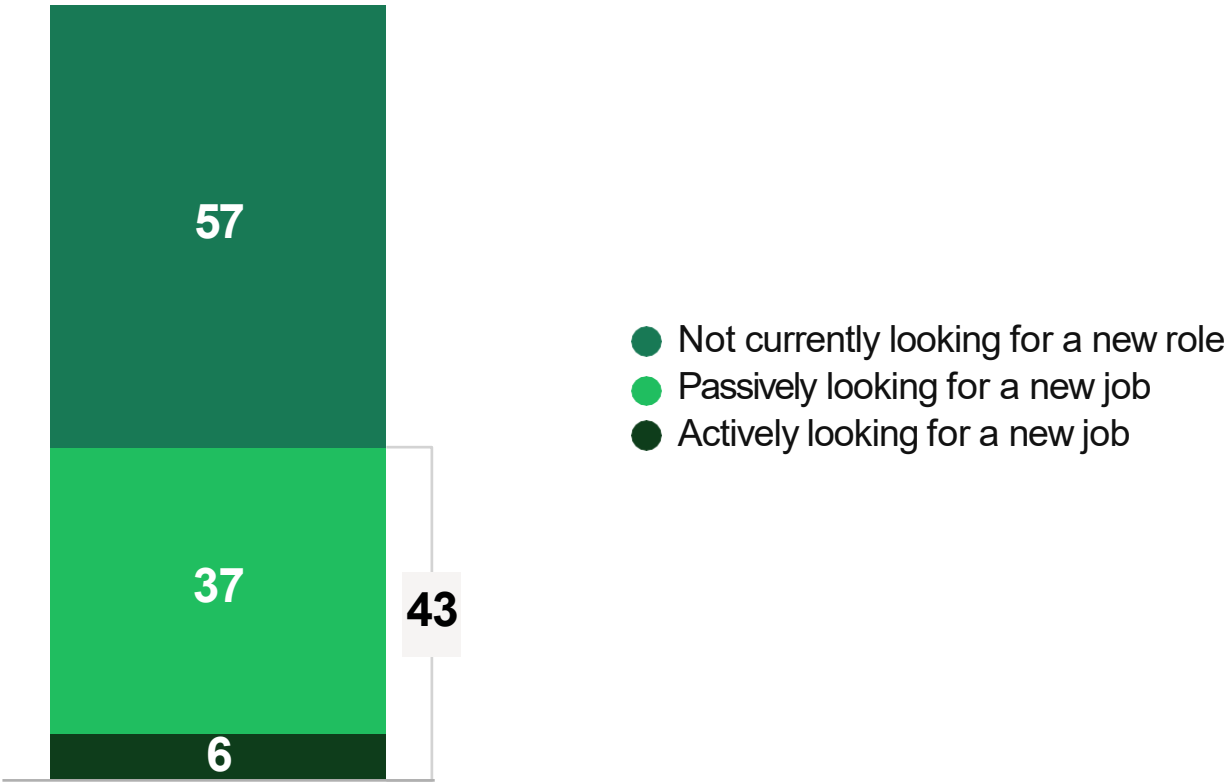
- A l'échelle des quatre pays analysés, **43% des travailleurs de terrain seraient prêts à démissionner**. En tête du classement, le Royaume-Uni avec un salarié sur deux (49%) prêt à quitter son emploi, suivi par l'Allemagne (44%) et les Etats-Unis (43%). **La France affiche un risque de démission plus faible à 37% mais en hausse (+3 pts).**
- **Parmi les secteurs les plus touchés, le commerce de détail figure en première position (48%)** avec près de la moitié des travailleurs de terrain qui risquent de démissionner. 7% ont indiqué chercher activement un nouvel emploi. Non loin derrière : le secteur des transports (46%) suivi par l'industrie (44%), la santé (41%) et l'éducation (41%).
- **53% des travailleurs de terrain se sentent épuisés par leur travail (57% en France).** Plus inquiétant, ce chiffre atteint 63% pour les travailleurs âgés de 18 à 24 ans. 55% des 18-24 ans déclarent, par ailleurs, rechercher un nouvel emploi.
- **18% des travailleurs de terrain ne sont pas satisfaits par leur travail (21% en France)** et 28% considèrent que la pandémie de Covid a négativement impacté leur satisfaction au travail (26% en France).
- **Les travailleurs de terrain qui ont rejoint leur entreprise depuis moins d'un an sont également les plus à risque de démissionner** : 52% d'entre eux déclarent chercher un travail, dont 10% de manière active. A l'inverse, seuls 32% des travailleurs de terrain ayant rejoint leur entreprise depuis au moins dix ans recherchent un nouvel emploi.
- Si le salaire est un critère décisif dans le choix d'un nouvel emploi, l'étude démontre que **les principaux facteurs qui poussent les travailleurs à démissionner sont d'ordre émotionnel**. Les travailleurs de terrain aspirent notamment à se sentir respectés, valorisés ou encore entretenir une bonne relation avec leur manager.
- **Les managers ont un rôle essentiel à jouer**. En France, plus d'un salarié sur 4 (27%) est mécontent de son manager. Et cela n'est pas sans conséquence. Les travailleurs de terrain français qui ne sont pas satisfaits de leurs managers ont 2,2 fois plus de chance de quitter l'entreprise, 1,4 fois plus de risque de burn-out et sont 3,2 fois plus susceptibles de ne pas recommander leur entreprise.
- **Le rapport explore trois axes sur lesquels les entreprises peuvent agir** : mesurer et comprendre les attentes des travailleurs de terrain ; former les managers à ces nouveaux enjeux et investir afin d'améliorer l'environnement de travail.

# Most deskless workers feel burned out, and 43% are at risk of quitting

“I feel burned out from work” (%)



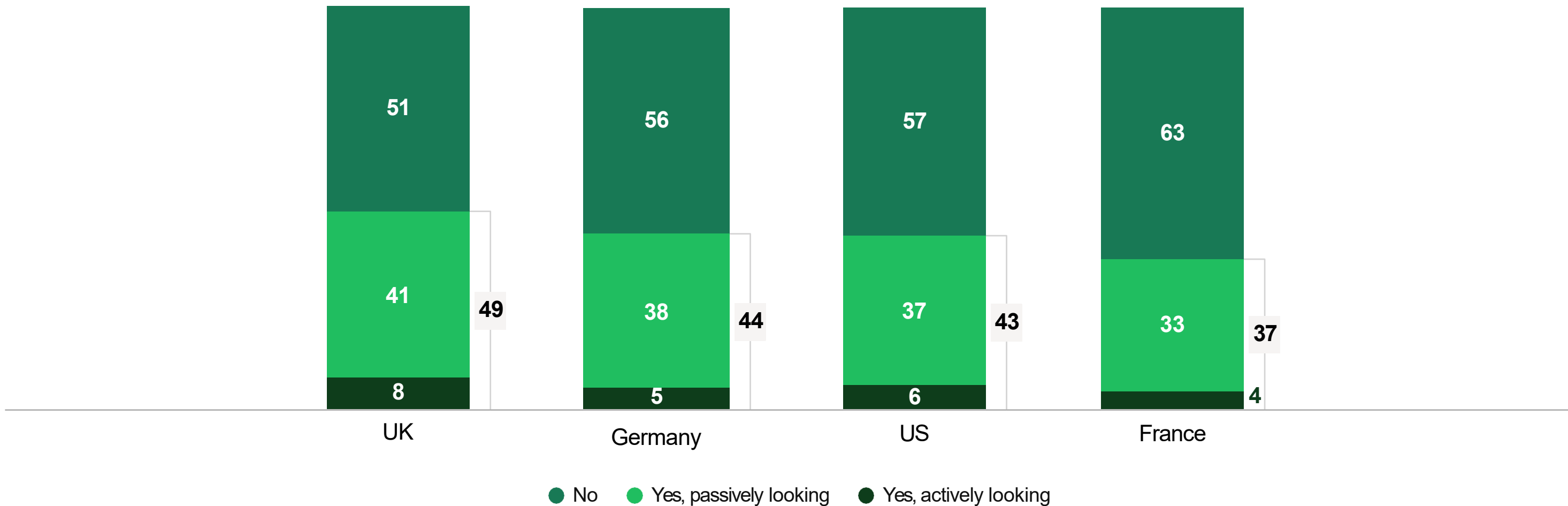
Deskless workers looking for a new job (%)



**Sources:** BCG Future of Work Deskless Worker Survey, October 2022; BCG analysis.  
**Note:** 4,668 deskless workers surveyed in France, Germany, the UK, and the US. Survey questions: “How much do you agree with the following statement – ‘I feel burned out from work?’” and “Are you looking for a new job?”

# The UK has the highest proportion of deskless workers at risk of quitting

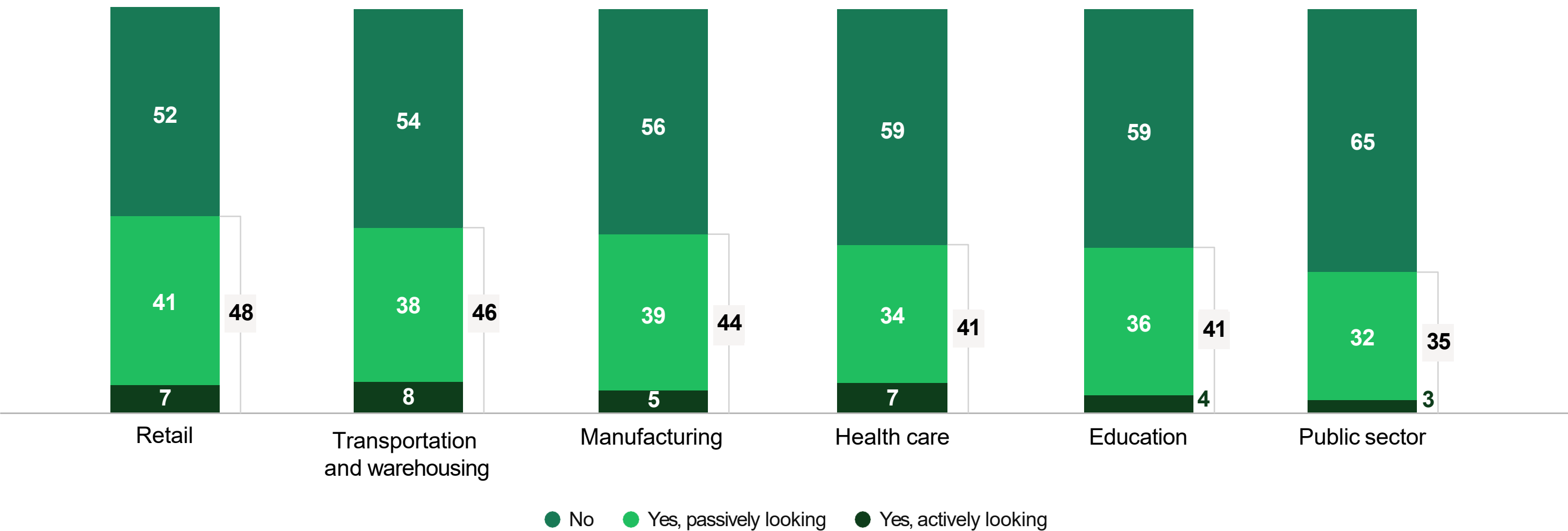
Deskless workers at risk of quitting, by country (%)



**Sources:** BCG Future of Work Deskless Worker Survey, October 2022; BCG analysis.  
**Note:** Survey question: “Are you looking for a new job?” Because of rounding, not all bar segment figures add up to the subtotals given for them.

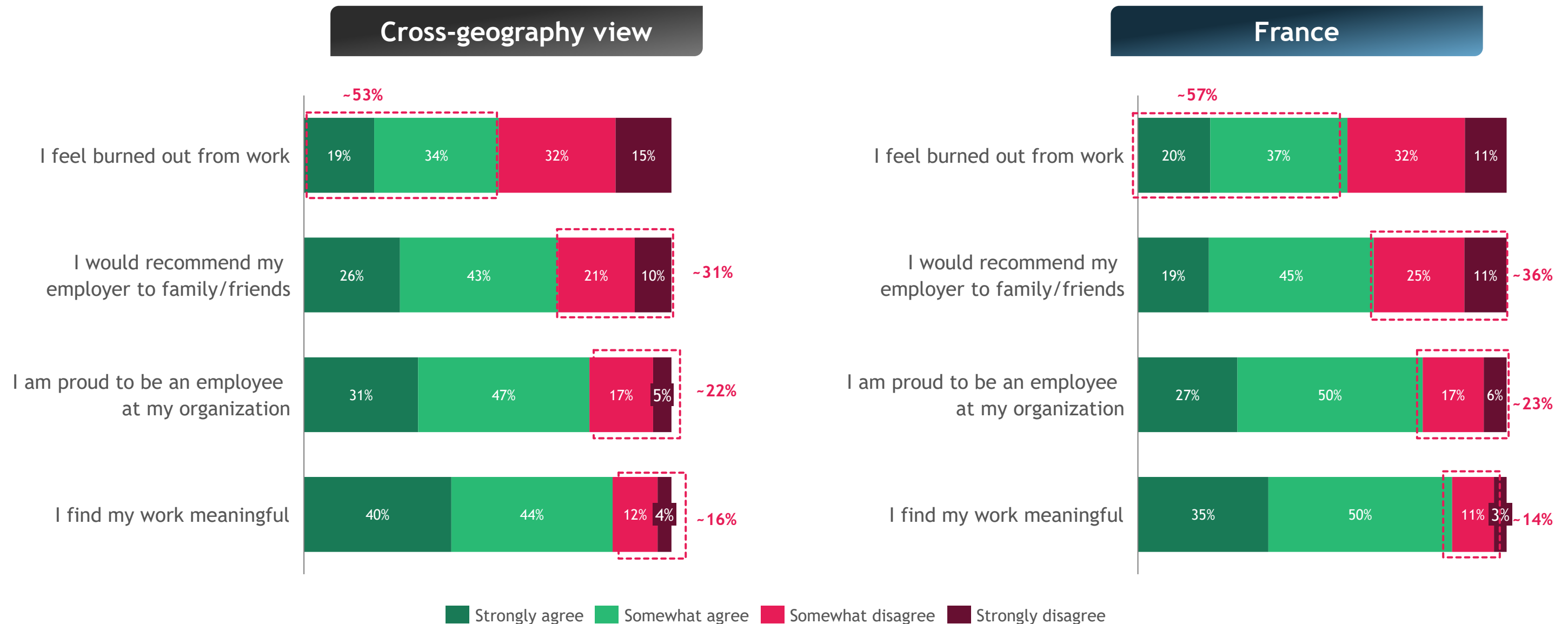
# Retail tops other industries for deskless workers at risk of quitting

Deskless workers at risk of quitting, by industry (%)



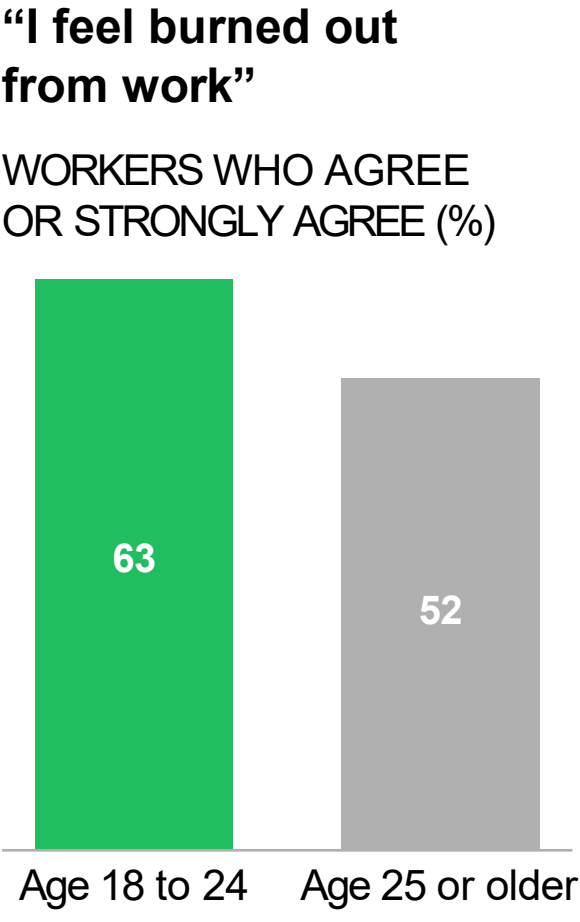
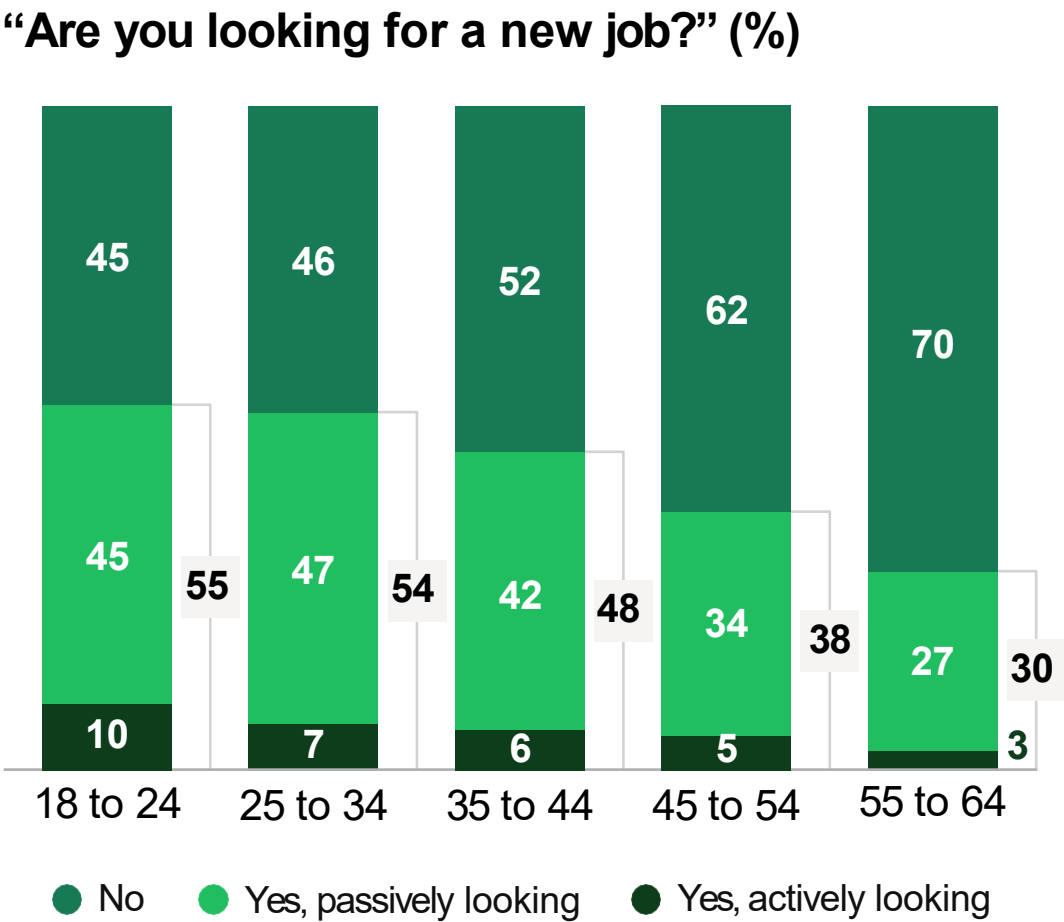
**Sources:** BCG Future of Work Deskless Worker Survey, October 2022; BCG analysis.  
**Note:** Survey question: “Are you looking for a new job?” Because of rounding, not all bar segment figures add up to the subtotals given for them.

# Slight increase in French workers feeling burned out, with fewer recommending their employer to family/friends compared to other countries



Survey question: How much do you agree with the following statements?; Source: BCG FoW Deskless Worker Survey, October 2022 (N=4,668 in the US, Germany, France, UK, approximately ~1,000 per country); Total France N = 1179

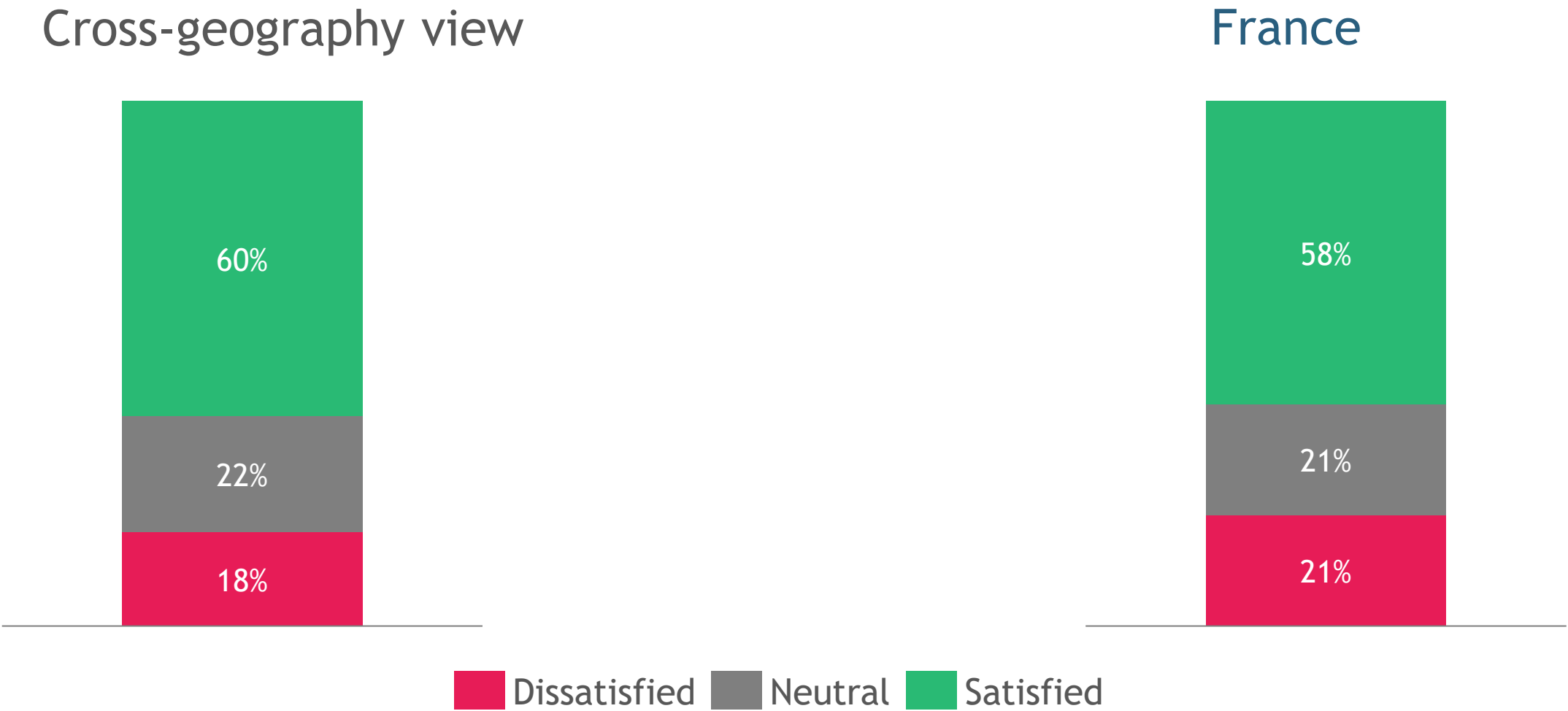
# The youngest deskless workers are likelier to quit, to be less satisfied, and to be more burned out



**Sources:** BCG Future of Work Deskless Worker Survey, October 2022; BCG analysis.  
**Note:** Because of rounding, not all bar segment figures add up to the subtotals given for them.

# French deskless worker job satisfaction in line with other nations

## Overall job satisfaction

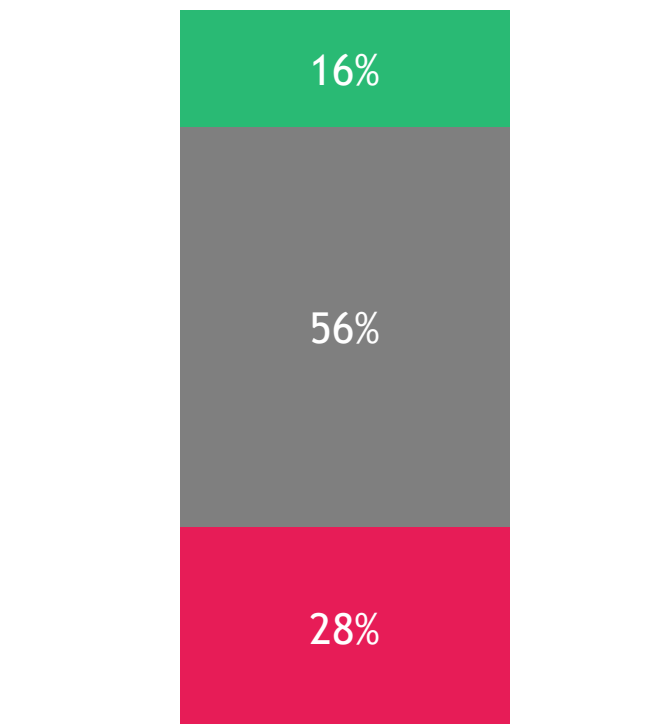


Survey Questions: 1. Overall, how satisfied are you at your current job/company? Source: BCG FoW Deskless Worker Survey, October 2022 (N=4,668 in the US, Germany, France, UK, approximately ~1,000 per country); Total France N = 1179

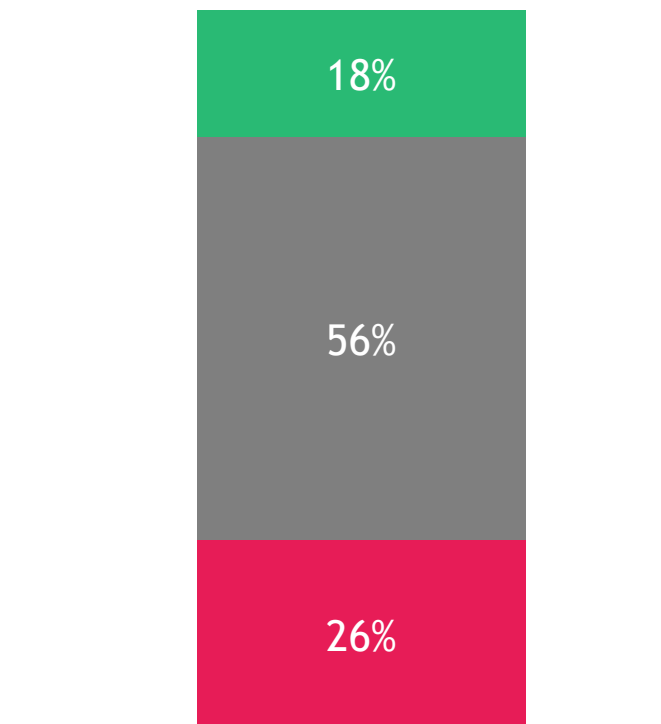
# One in four deskless French workers reported COVID negatively impacting their job satisfaction

## Impact of COVID-19 on job satisfaction

Cross-geography view



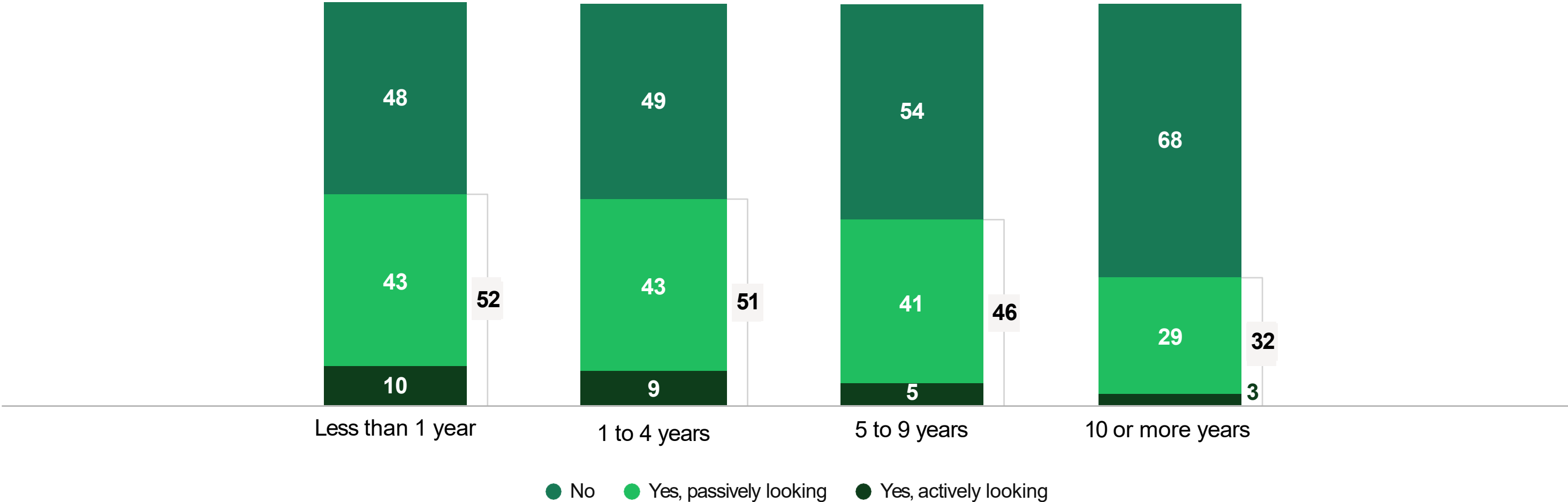
France



Worse No impact Better

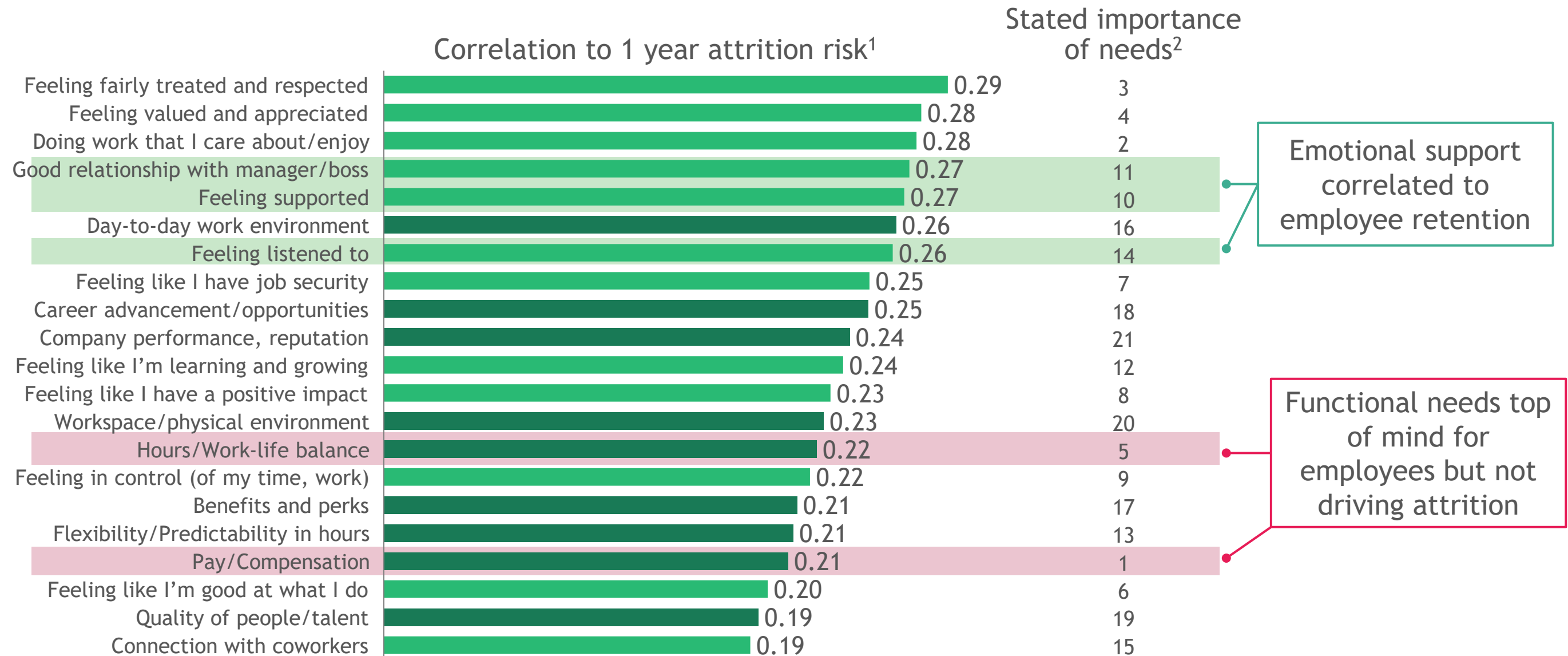
# Deskless workers who have the least tenure are the readiest to quit

Deskless workers at risk of quitting, by years on the job (%)



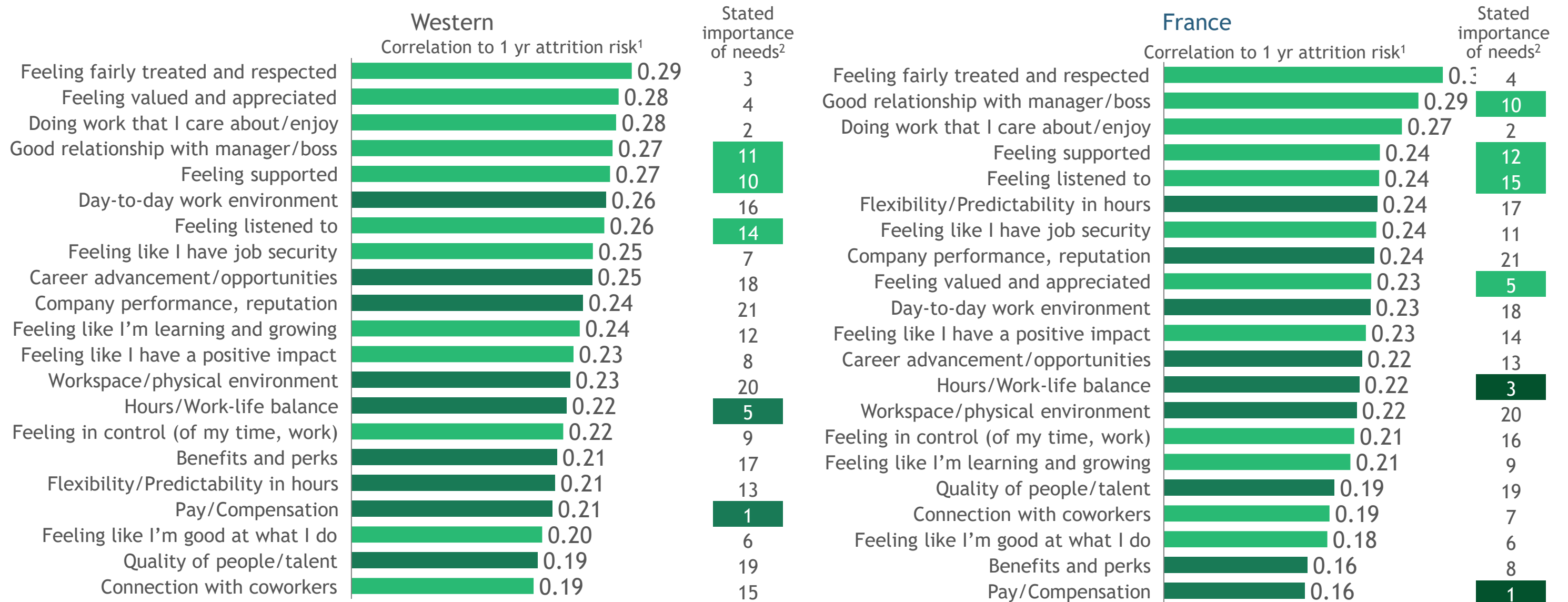
**Sources:** BCG Future of Work Deskless Worker Survey, October 2022; BCG analysis.  
**Note:** Survey questions: "Are you looking for a new job?" and "How long have you worked at your current company?" Because of rounding, not all bar segment figures add up to the subtotals given for them.

# While global deskless workers say functional needs (e.g., pay, hours) are most important to them, emotional needs are what drive them to leave



Source: BCG Deskless Worker Sentiment Survey, October 2022; Number of respondents = 4,668 across the U.S., U.K., France and Germany; Survey questions: 1) Correlation between satisfaction with each listed element and attrition risk at 1 year; 2) MaxDiff scores

# French deskless workers similarly driven by more emotional needs

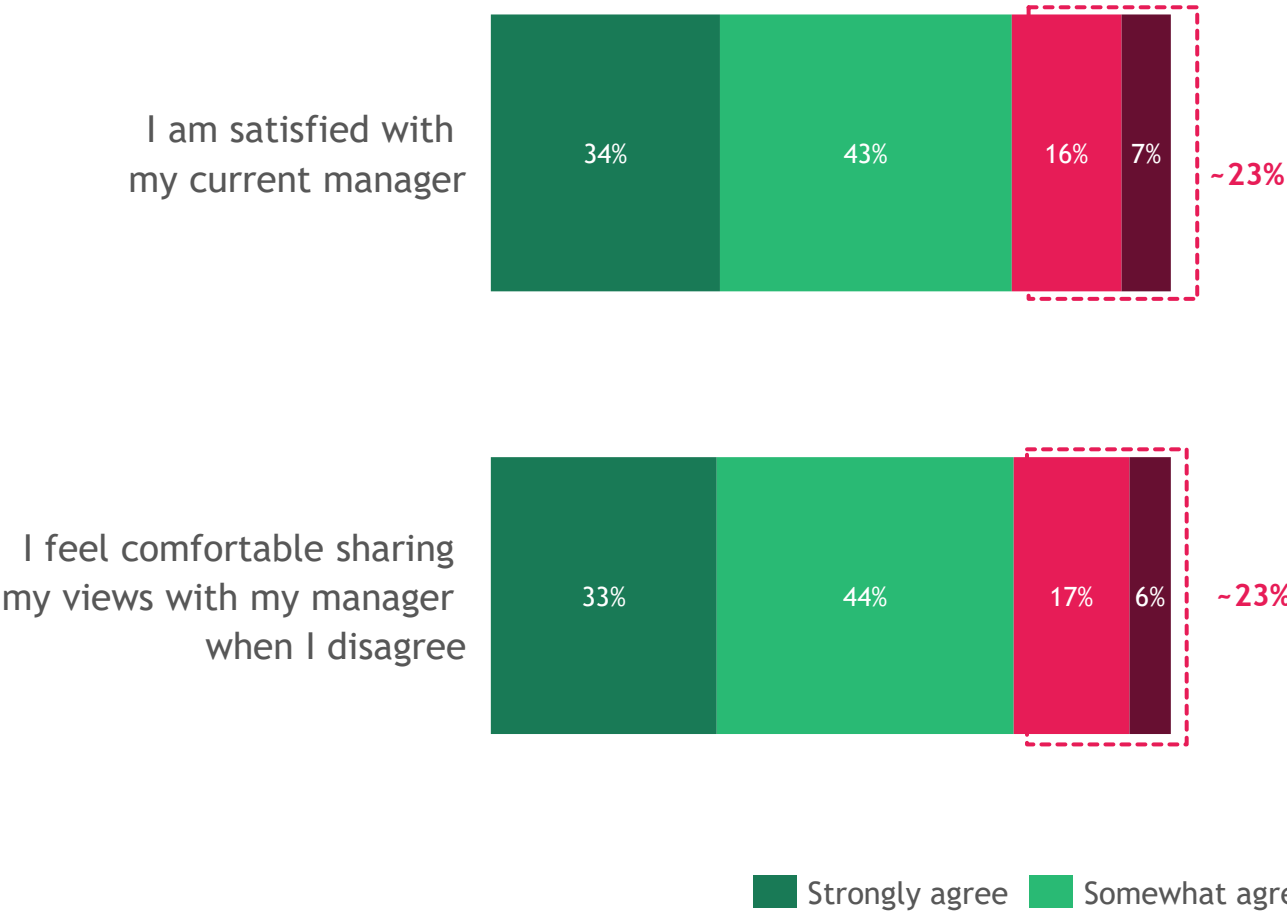


Source: BCG Deskless Worker Sentiment Survey, October 2022; Number of respondents = 4,668 across the U.S., U.K., France and Germany; Total France N = 1179; Survey questions: 1) Correlation between satisfaction with each listed element and attrition risk at 1 year; 2) MaxDiff scores

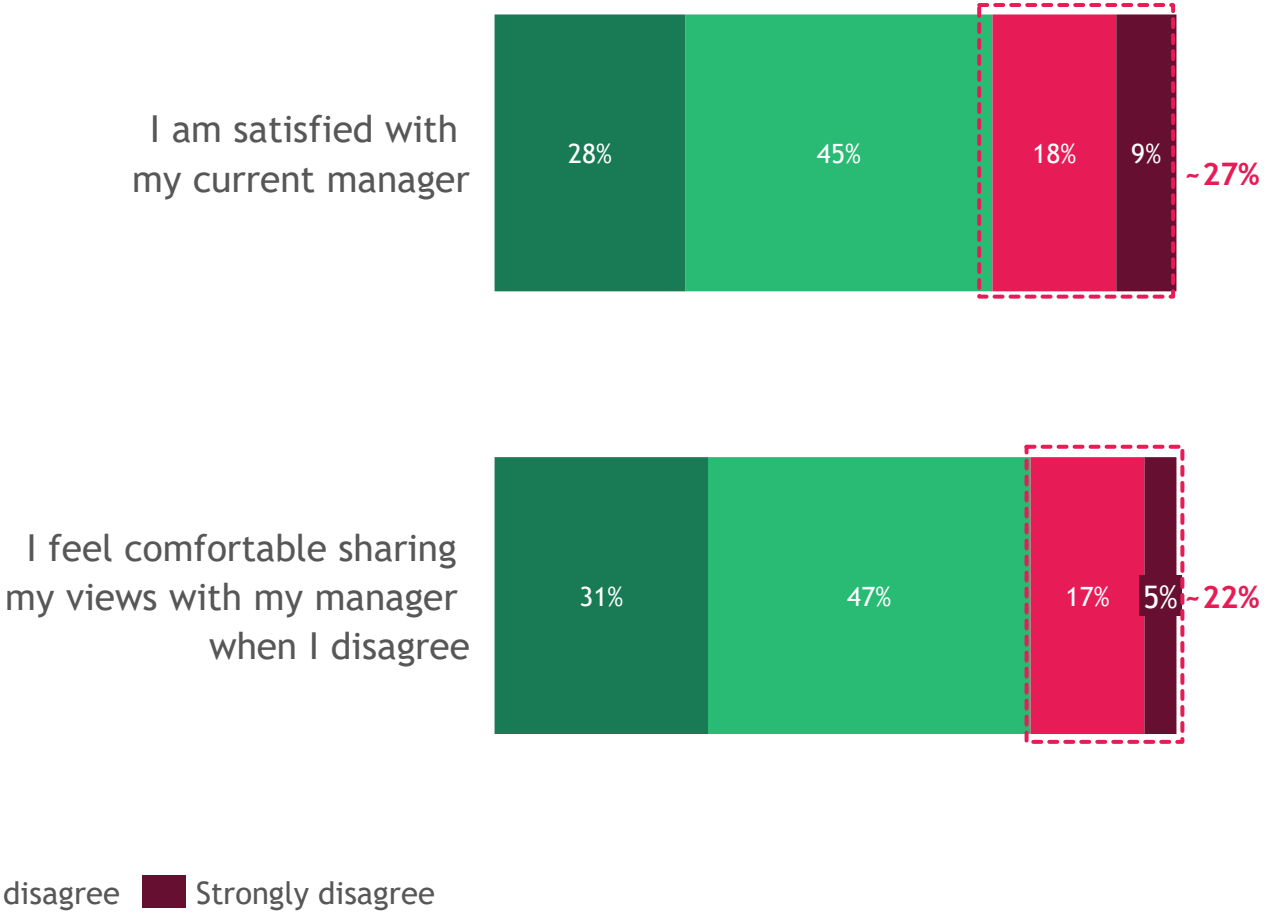
Emotional Functional

# One in four employees are dissatisfied with their manager

Cross-geography view



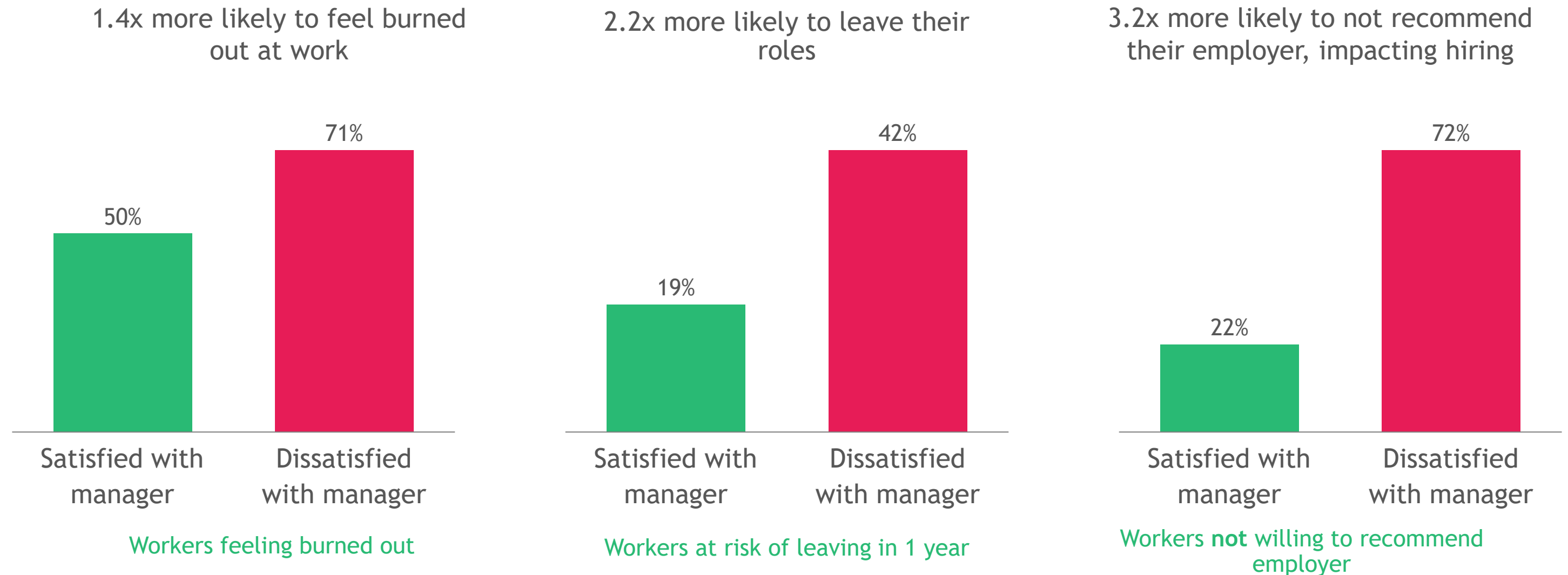
France



Survey question: How much do you agree with the following statements?; Source: BCG FoW Deskless Worker Survey, October 2022 (N=4,668 in the US, Germany, France, UK, approximately ~1,000 per country); Total France N = 1179

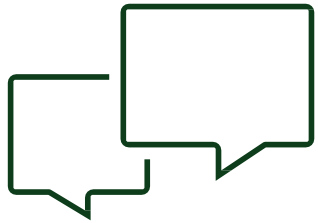
# Managers are critical and influence burnout, retention, and hiring

French deskless workers that are dissatisfied with their managers are ...



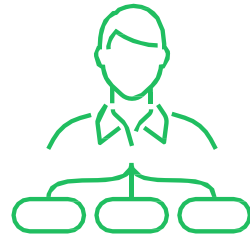
Source: BCG Deskless Survey, October 2022; Survey question: How much do you agree with the following statement? 1) I feel burned out and 2) I would recommend my employer to family/friends; 3) Do you see yourself working at your current company in 1 year?; Global respondents N = 4,668; Manufacturing industry based on representative sample (total sector N = 448)

# How companies can keep their deskless workers



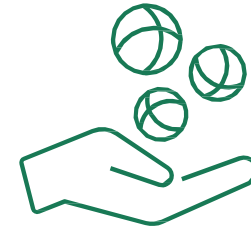
## **Find out what workers want**

Invest in learning what employees feel is important, make changes to meet their needs, and align the changes to the organization's goals



## **Build great managers**

Use best practices from top-performing managers and input from deskless workers to design and implement upskilling and new routines and tools for managers

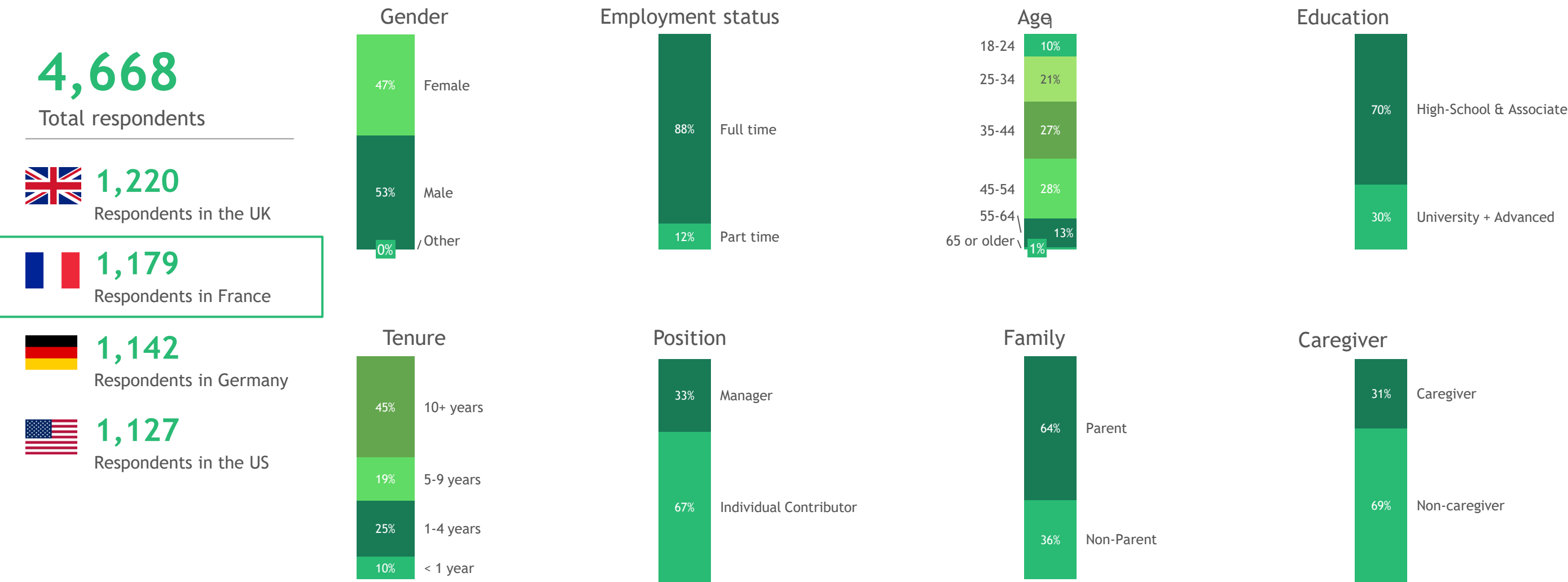


## **Invest in making work better**

Experiment with technology, flexible work, new benefits, governance, culture, and other new ways of working to make work better before scaling to the rest of the organization

# Demographics of survey respondents

## Demographics of France respondents



Source: BCG FoW Deskless Worker Survey, October 2022 (N=4,668 in the US, Germany, France, UK, approximately ~1,000 per country); Total France N = 1179

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