



Focus
France



Covid-19 Crisis Heightens the Need to Accelerate Your Digital Transformation

It's Go Time for Digital Transformation

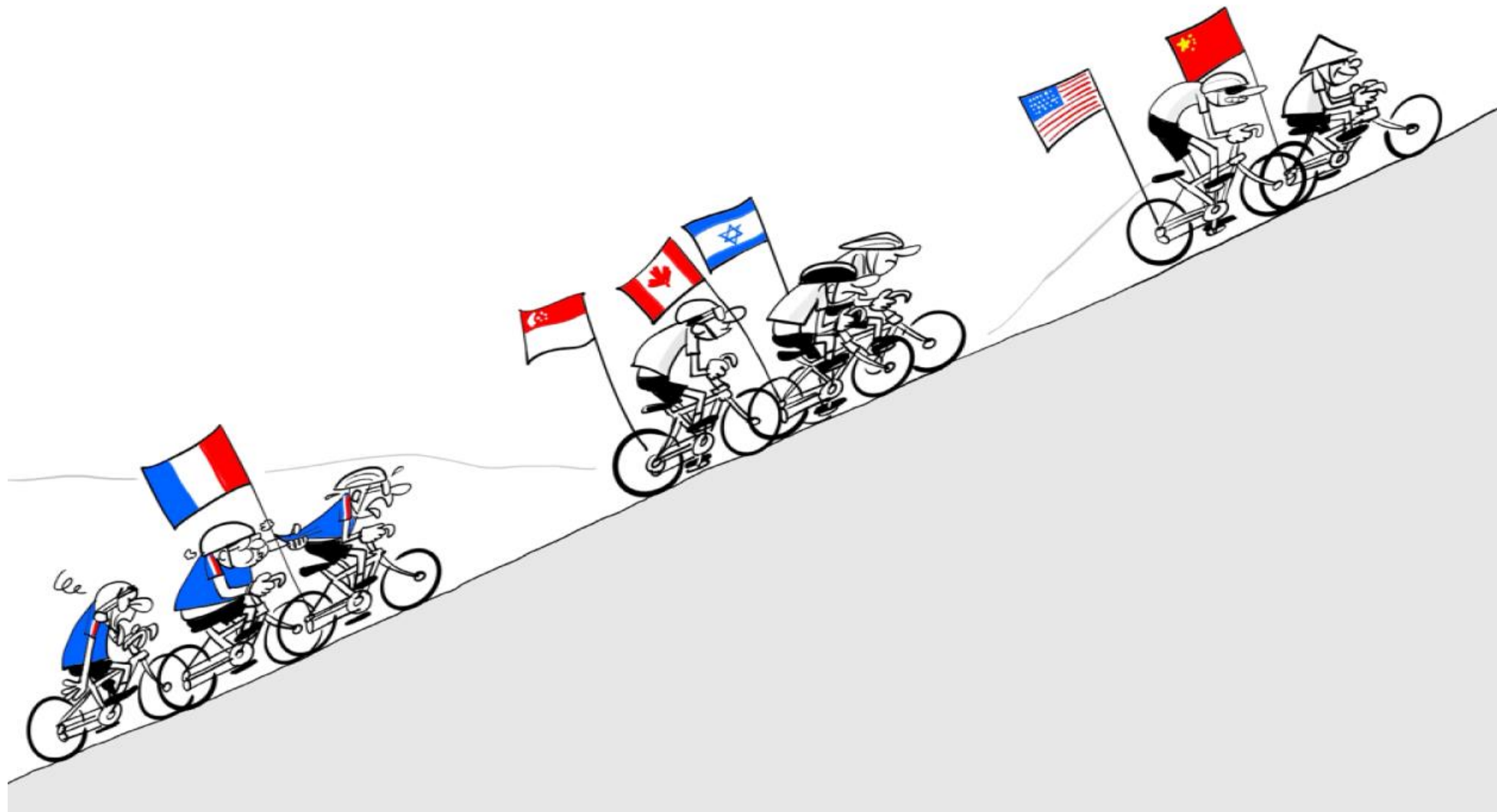
JUILLET 2020

La définition suivante de la transformation digitale a été partagée aux sondés :

La mise en place dans une entreprise des modes de fonctionnement et des technologies issues d'internet dans l'ensemble de ses activités.

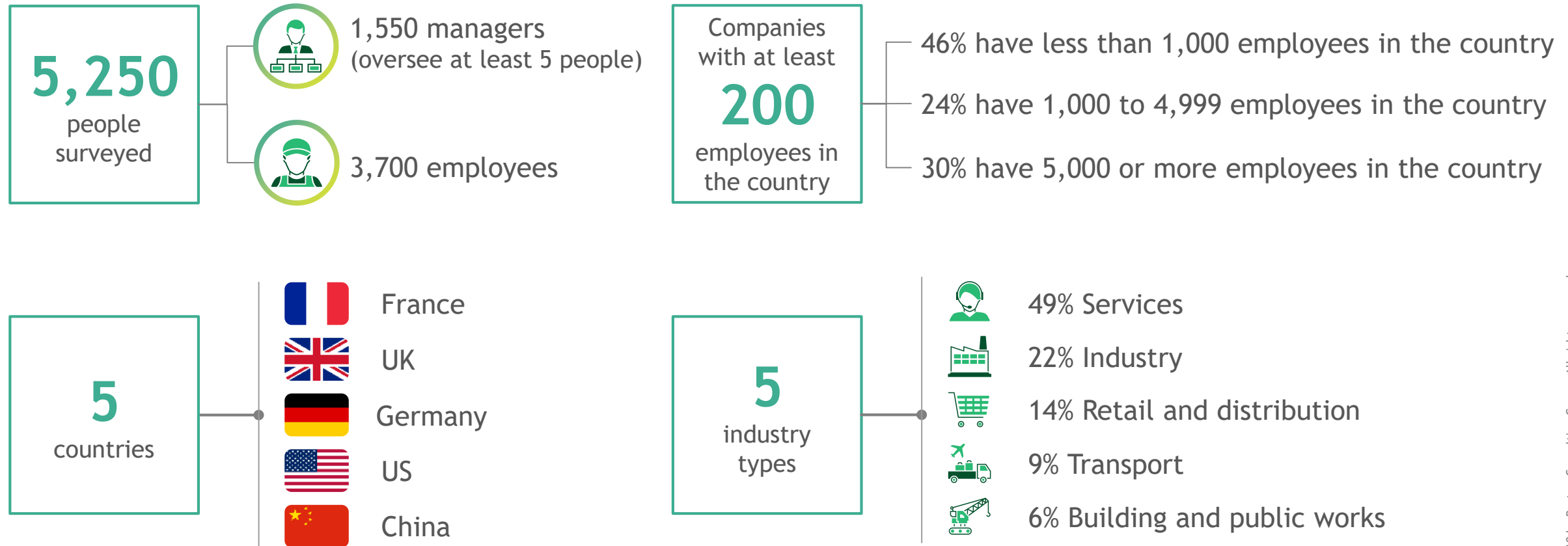
La transformation digitale des entreprises va beaucoup plus loin que le simple développement d'application sur smartphone. Elle amène les entreprises à redéfinir leurs produits et services, leurs modes de fonctionnement, leurs modes de commercialisation et d'interaction avec leurs clients (plus de ventes au travers de sites web, paie gérée sans papier, accès à son espace client via un mobile etc...)

Baromètre de la maturité digitale - 06/19 : la France à l'avant du peloton dans la compétition mondiale, elle doit accélérer pour rejoindre le groupe de tête



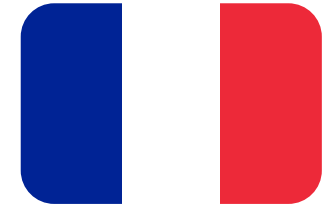
Methodology

Online survey conducted by Ipsos May 4-18, 2020



Source: BCG and Ipsos 2020 digital transformation survey.

Survey sample size details - French managers and employees



350 managers















900 employees

Percentage		350 managers	900 employees
Gender	Men	70	55
	Women	30	45
Age	Under 35	28	23
	35 to 54	52	59
	55 and over	20	18
Employees in the country	Less than 1,000	38	30
	1,000 to 4,999	22	27
	5,000 or more	40	43
Business sector	Industry	24	24
	Building and public works	8	4
	Retail and distribution	8	9
	Transport	7	7
	Services	53	56

Source: BCG and Ipsos 2020 digital transformation survey.

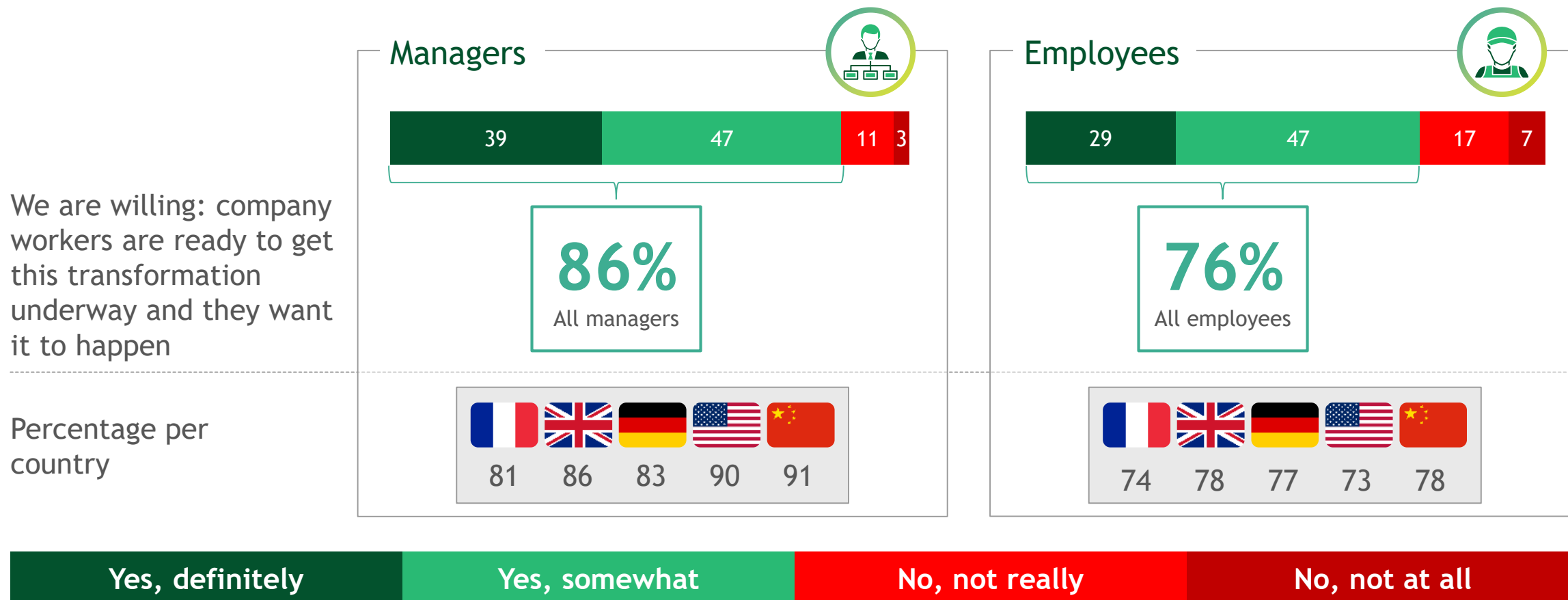
At companies undertaking an upgrade, close to 90% of managers and 85% of employees think it will help them deal with the effects of the pandemic

% Yes	Managers 						Employees 					
	All managers						All employees					
Allow it to better support the impact of the current economic slowdown	89	82	87	87	94	96	84	76	86	77	84	94
Allow it to relaunch its activity more easily once the health crisis is over	87	80	86	83	93	92	81	73	85	75	84	88
Allow it to better safeguard employment in the current economy	84	77	83	79	91	91	78	71	79	66	82	89
Average	87	80	85	83	93	93	81	73	83	73	83	90

Source: BCG and Ipsos 2020 digital transformation survey.

Note: Answers from respondents at companies undergoing a digital transformation to the question: “In your opinion, in comparison to other companies that have not done so, will the implementation of a digital transformation project within your company...?”

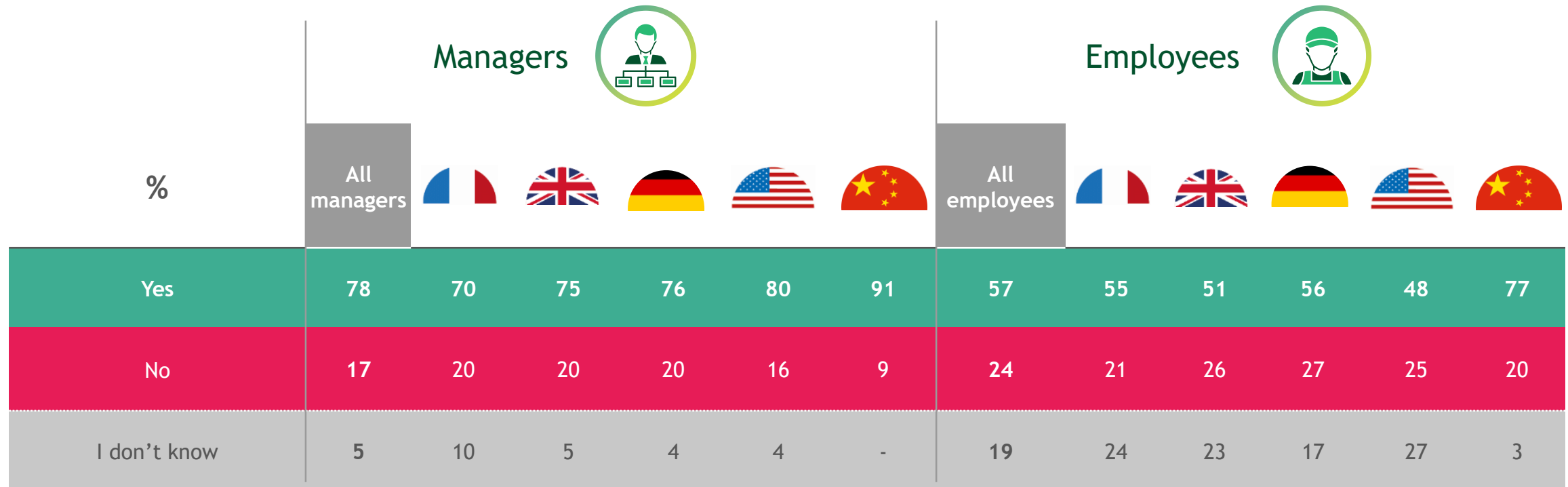
86% of managers and 76% of employees are willing to participate, especially managers in China and the US



Source: BCG and Ipsos 2020 digital transformation survey.

Note: Answers from all respondents to the question: "Regarding digital transformation, would you say that the following applies or does not apply to your company - 'We are willing: company employees are ready to get this transformation underway and they want it to happen.'"

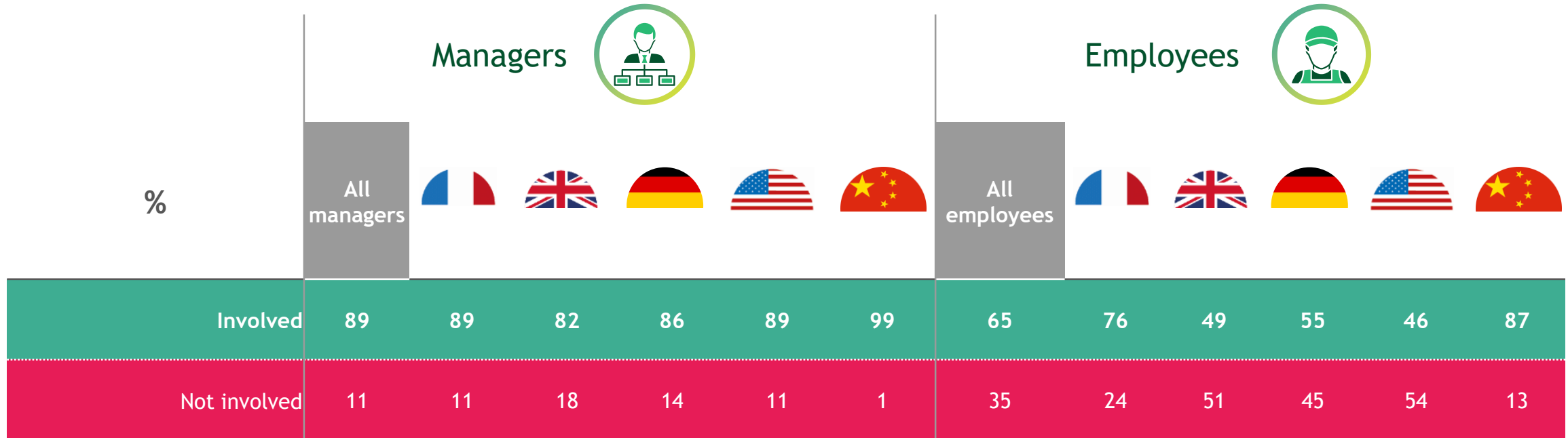
78% of managers think their company is undertaking a transformation



Source: BCG and Ipsos 2020 digital transformation survey.

Note: Answers from all respondents to the question: “Is your company undergoing a digital transformation at present?”













Managers are far more engaged in transformation projects than employees: close to 90% feel involved compared with 65% of employees



Source: BCG and Ipsos 2020 digital transformation survey.

Note: Answers from respondents whose companies are undergoing or piloting a project to the question: “How would you describe your situation in the digital transformation of your company?”

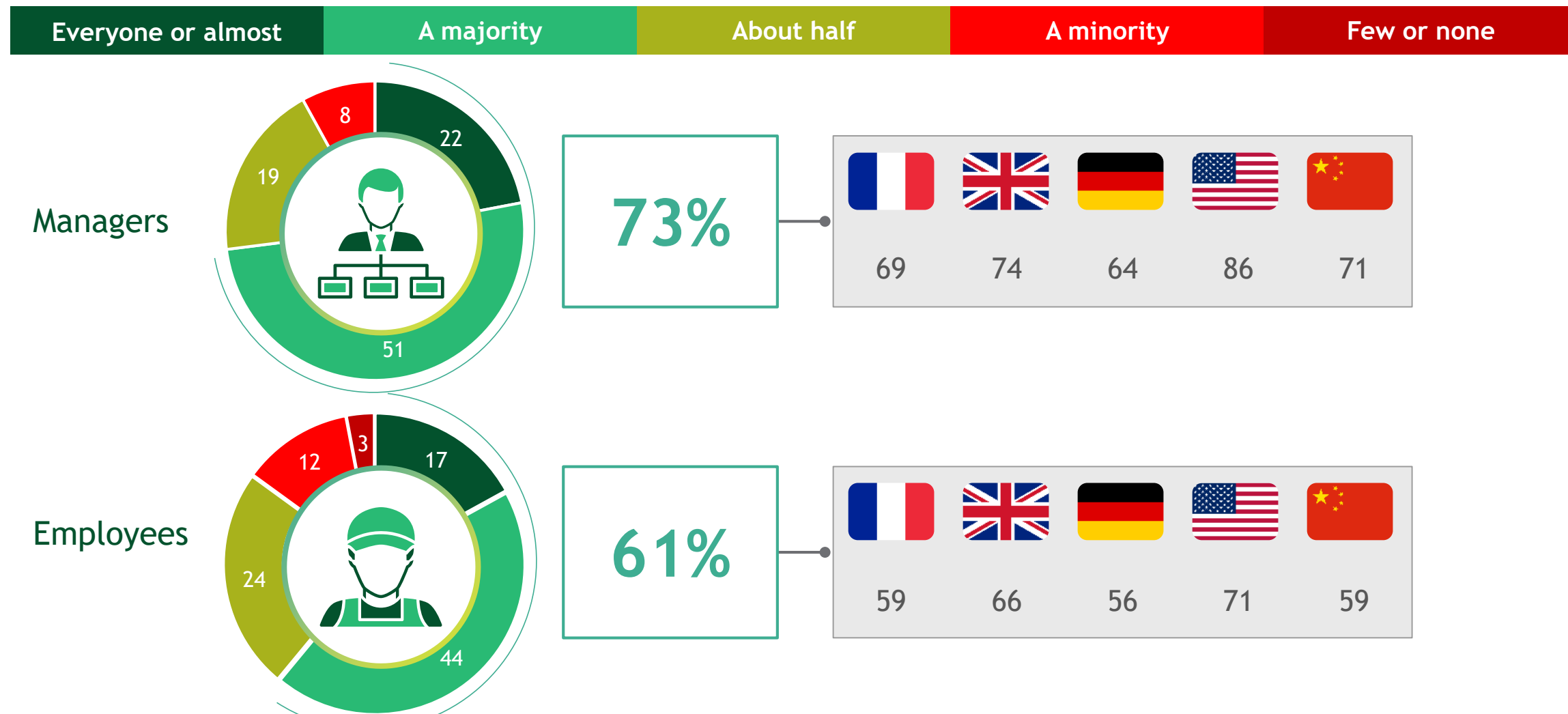
But only 29% of managers and 22% of employees believe their company's transformation leads the competition

%	Managers 						Employees 					
	All managers						All employees					
It's way ahead	6	4	6	6	11	6	5	4	7	4	7	3
It's a bit ahead	23	14	22	15	23	42	17	12	17	12	17	27
Ahead	29	18	28	21	34	48	22	16	24	16	24	30
It's on the same level	34	36	34	38	28	33	43	45	42	44	47	38
It's a bit behind	25	31	26	30	21	18	25	24	26	29	20	29
Behind	37	46	38	41	38	19	35	39	34	40	29	32

Source: BCG and Ipsos 2020 digital transformation survey.

Note: Answers from all respondents to the question: "Regarding digital transformation, how would you say your company compares to its competitors?"

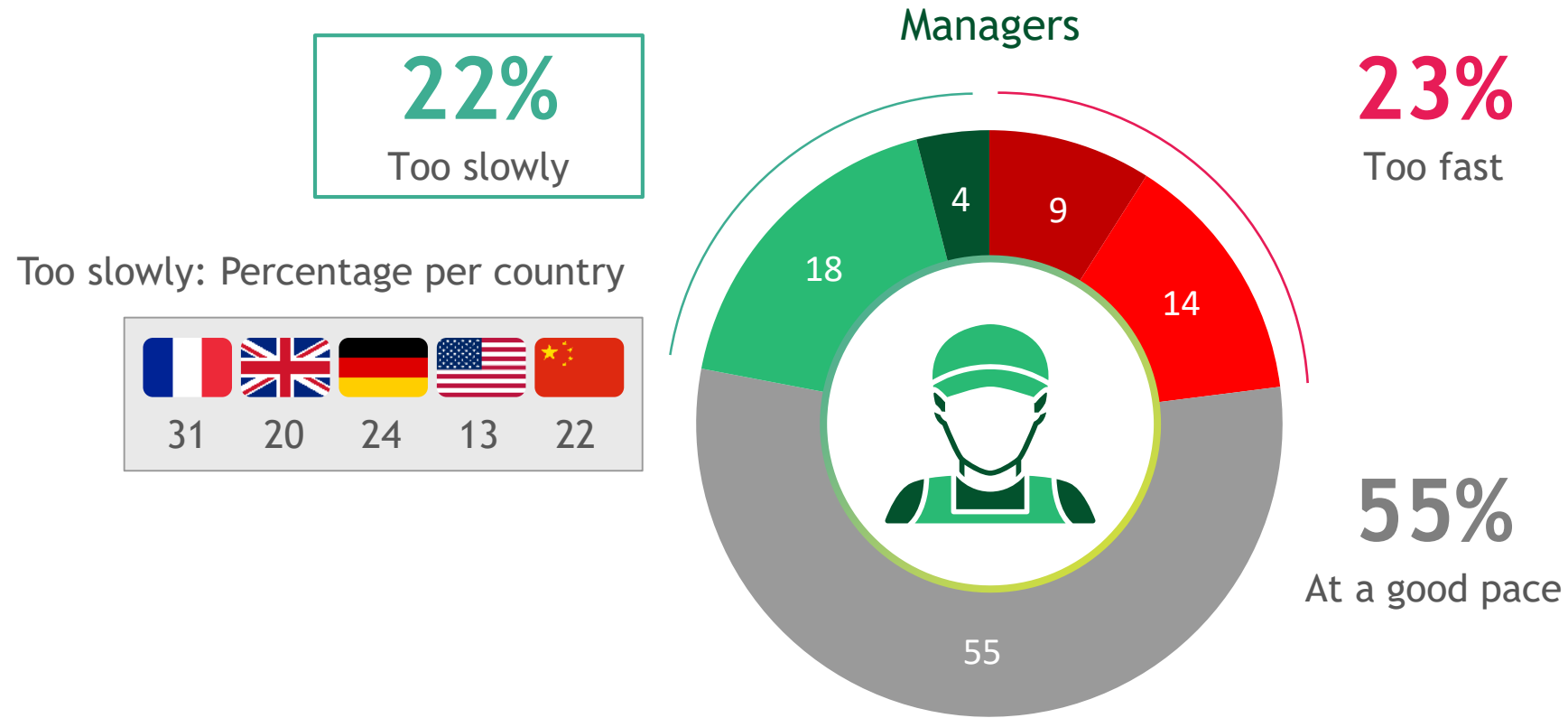
Only 61% of employees endorse their company's approach, compared with 73% of managers



Source: BCG and Ipsos 2020 digital transformation survey.

Note: Answers from respondents whose companies are undergoing or piloting a project to the question: "In your opinion, how many employees in your company endorse the digital transformation approach today?"













22% of managers want their company to move faster



Source: BCG and Ipsos 2020 digital transformation survey.

Note: Answers from all respondents to the question: "Overall, would you say that, regarding digital transformation, your company is going..."

Most managers and employees believe a transformation will help their organization, but fewer see a direct benefit for their job, career, or pay

% Yes	Managers 						Employees 					
	All managers						All employees					
The efficiency of employees	79	74	76	77	84	84	63	63	62	59	62	71
The company's work organization	76	71	74	74	80	81	61	57	63	58	58	72
The ability of companies to make decisions more quickly	75	64	75	69	82	86	60	57	58	53	60	74
The ability of companies to develop products and services more quickly	74	66	72	71	80	83	59	57	58	55	56	71
Working conditions	74	62	71	72	81	88	59	56	56	54	55	74
Interest in working for the company	73	67	66	74	78	81	56	54	53	54	52	70
Company competitiveness	73	65	72	69	78	82	61	59	57	61	56	73
Company training	72	66	73	65	78	77	56	51	52	50	54	73
The profiles of people who work in the companies	69	60	66	68	76	80	54	49	50	50	53	70
Company benefits	68	62	61	62	77	81	53	55	48	43	52	70
Job retention in the company	66	53	60	67	77	74	50	42	46	51	50	66
Career opportunities	65	51	61	64	77	77	47	38	43	42	46	69
Pay levels within the company	57	40	52	53	72	70	39	29	31	38	43	59

Source: BCG and Ipsos 2020 digital transformation survey.

Note: Answers from respondents whose companies are undergoing or piloting a project to the question: "Overall, based on your experience or on what you know, would you say that digital transformation has a positive impact, a negative impact, or neither a positive nor a negative impact on...?"

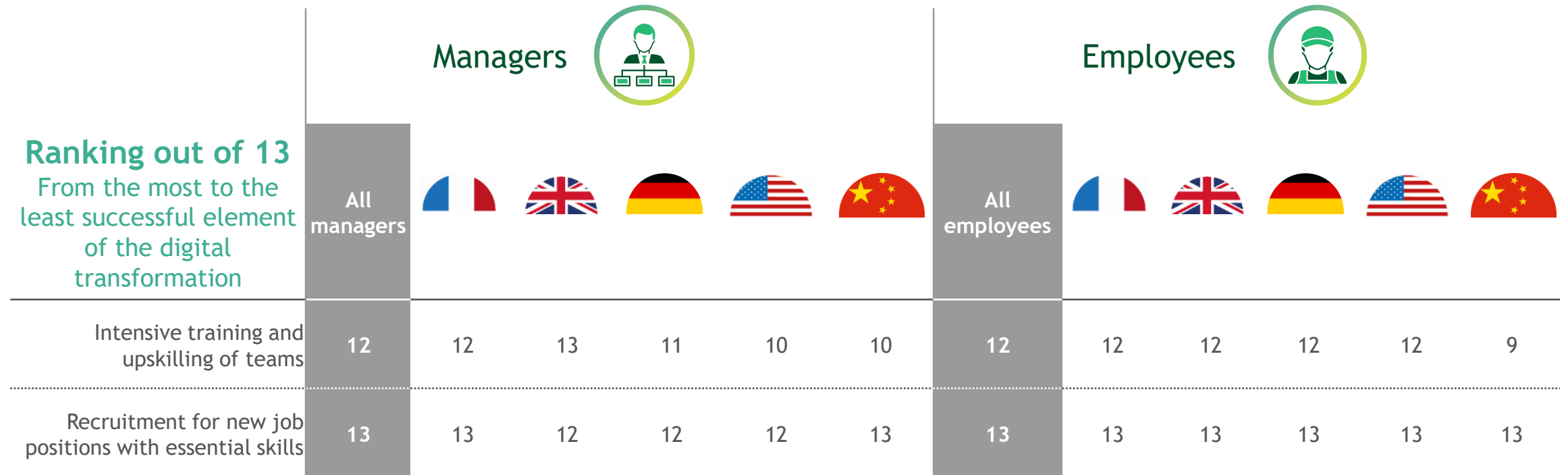
About 80% of managers and 71% of employees believe more investment is needed to address the impact of the crisis

% Yes	Managers 						Employees 					
	All managers						All employees					
Ways of working	83	78	84	74	87	96	77	75	75	70	71	93
Client relationships	80	73	79	74	81	93	71	64	70	66	68	90
Internal company processes	78	69	79	69	82	91	70	61	70	64	66	89
Marketing methods	77	68	79	71	77	92	65	55	64	59	61	91
Average	80	72	80	72	82	93	71	64	70	65	67	91

Source: BCG and Ipsos 2020 digital transformation survey.

Note: Answers from all respondents to the question: “To address the current and future impact of the health crisis, should your company increase its digital transformation investments in each of the following areas?”

Both managers and employees feel hiring, training, and upskilling are the least successful elements of their company's digital transformation



Source: BCG and Ipsos 2020 digital transformation survey.

Note: Answers from respondents whose companies are undergoing or piloting a project to the question: "When you think about the last time a digital transformation program was implemented in your company, would you say that each of the following elements was successful?"

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