



PayPal Poland Freelancer Insights Report

Method & Objectives



METHOD

- Online survey with 300 Freelancers (and those about to become Freelancers) carried out in local language in Poland in October 2017. This report is one of 22, reflecting markets around the world
- Freelancers are defined as those who do contract or freelancing work as or alongside their main income and do most of it on a computer, via the internet
- Considerers are defined as those who don't do contract or freelancing work but expect to start in the next 6 months and will do most of it on a computer, via the internet

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3. Getting Work & Use of Freelance Platforms



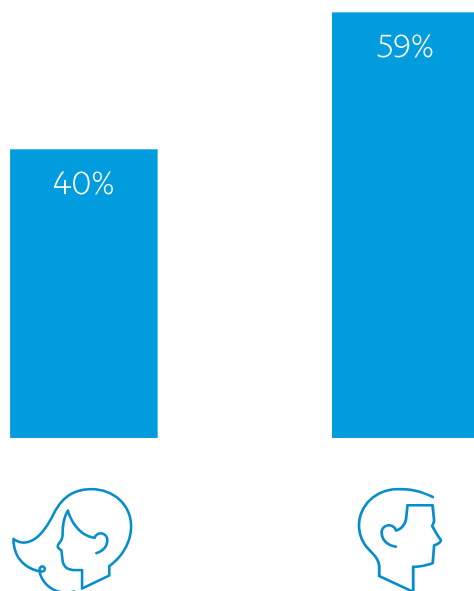
4. Dealing with Money

1. Freelancer Profile

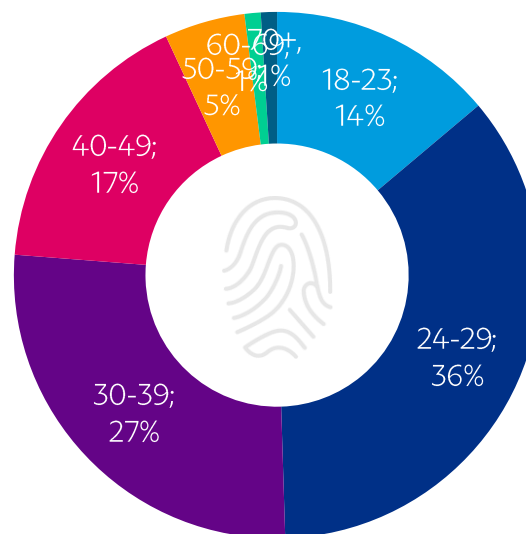
Freelancer profile: overview

Half of Poland's Freelancers are under 30 years old, and slightly more are men. On average they have been freelancing for almost 4 years

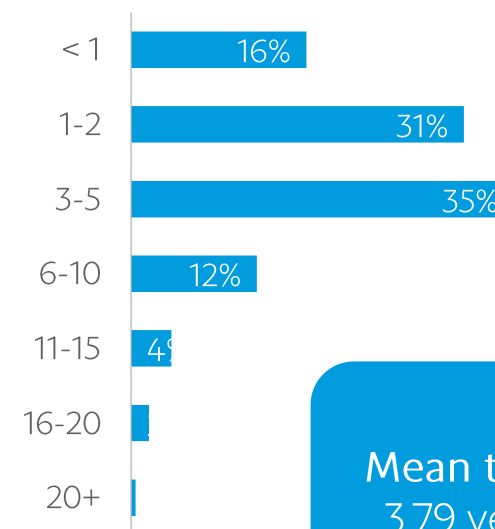
Gender profile



Age profile



Time freelancing



Mean time:
3.79 years

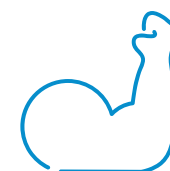
The freelancing business

There's a wide range in the number of clients and projects undertaken.



Income

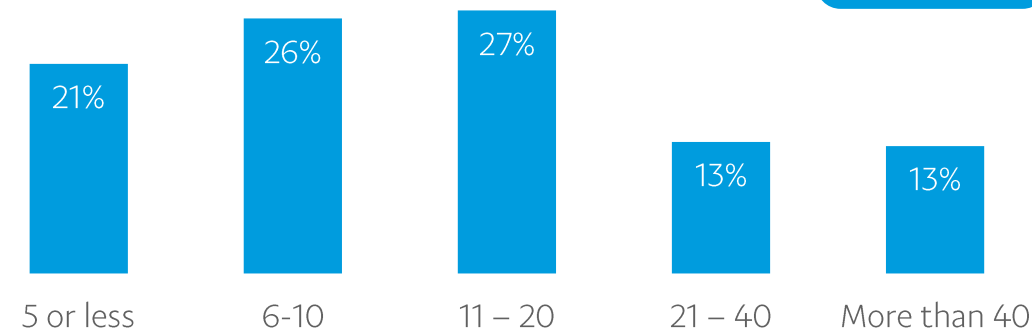
Income (Local currency)	%
320 001 zł or more	1%
280 001 zł - 320 000 zł	1%
240 001 zł - 280 000 zł	2%
200 001 zł - 240 000 zł	1%
160 001 zł - 200 000 zł	2%
120 001 zł - 160 000 zł	6%
80 001 zł - 120 000 zł	12%
40 001 zł - 80 000 zł	19%
20 001 zł - 40 000 zł	17%
10 001 zł - 20 000 zł	15%
10 000 zł or less	15%
Prefer not to say	7%
Mean income	
67 000 zł	



Number of Clients or Projects

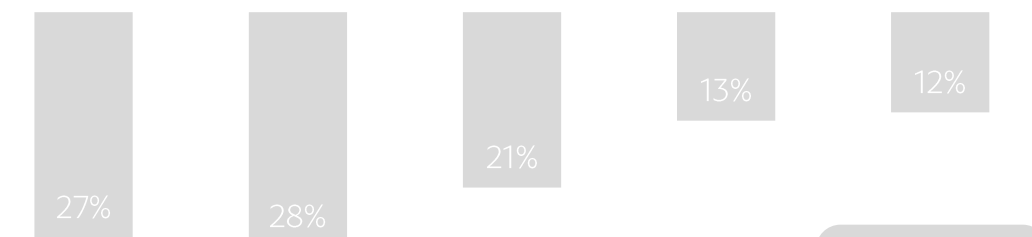
Clients

Mean:
16.7



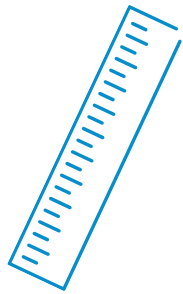
Projects

Mean:
15.4

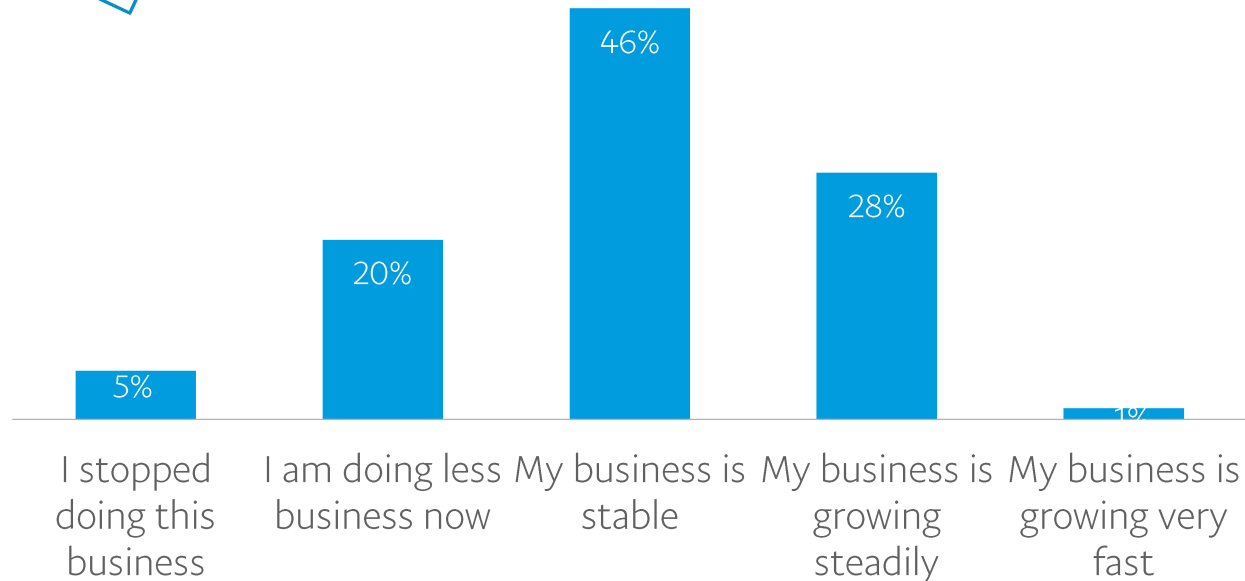


Freelancers expect their work to increase

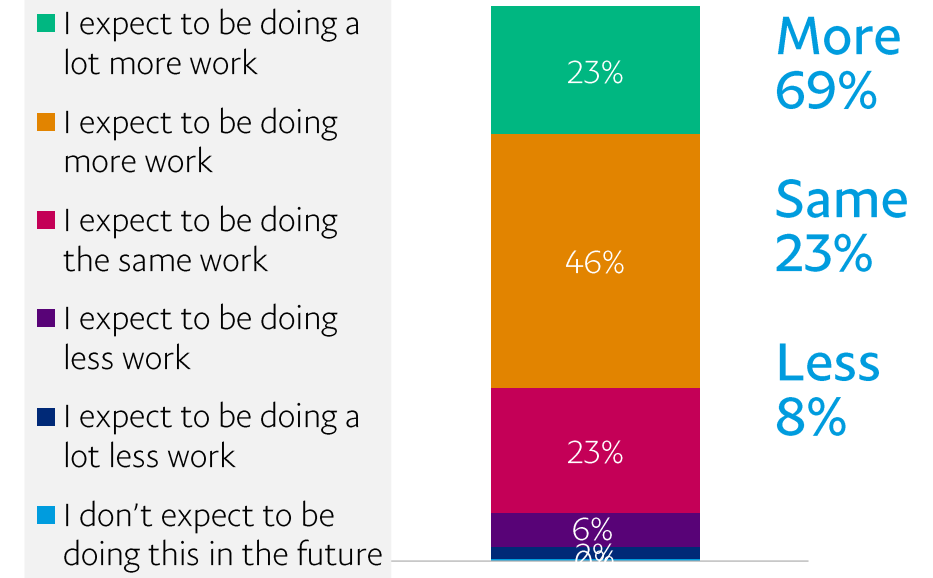
Business has mostly been stable or growing over the last year and two thirds of Freelancers anticipating future growth



Growth

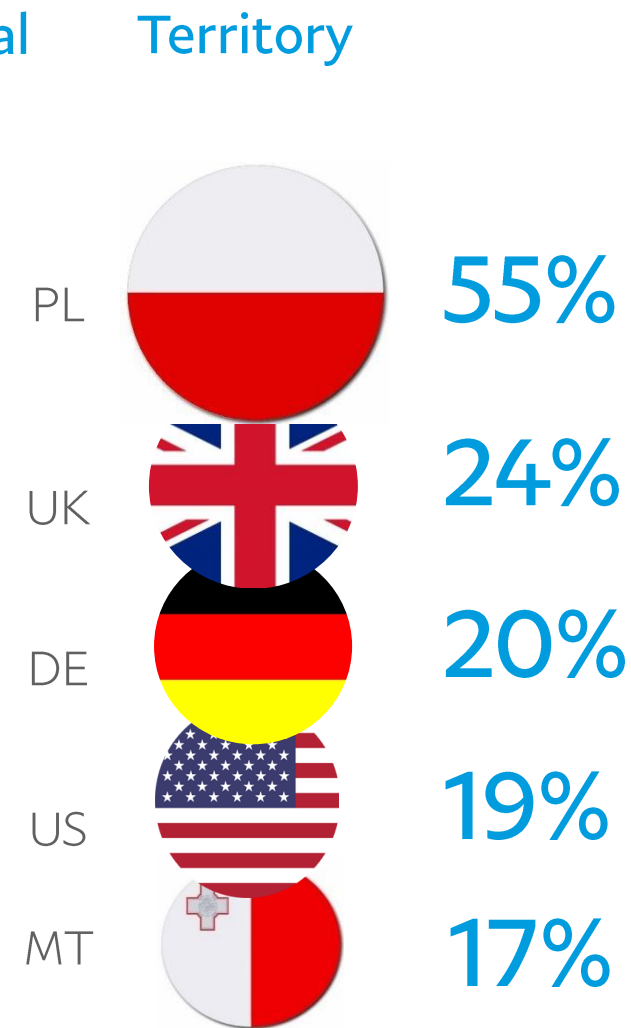
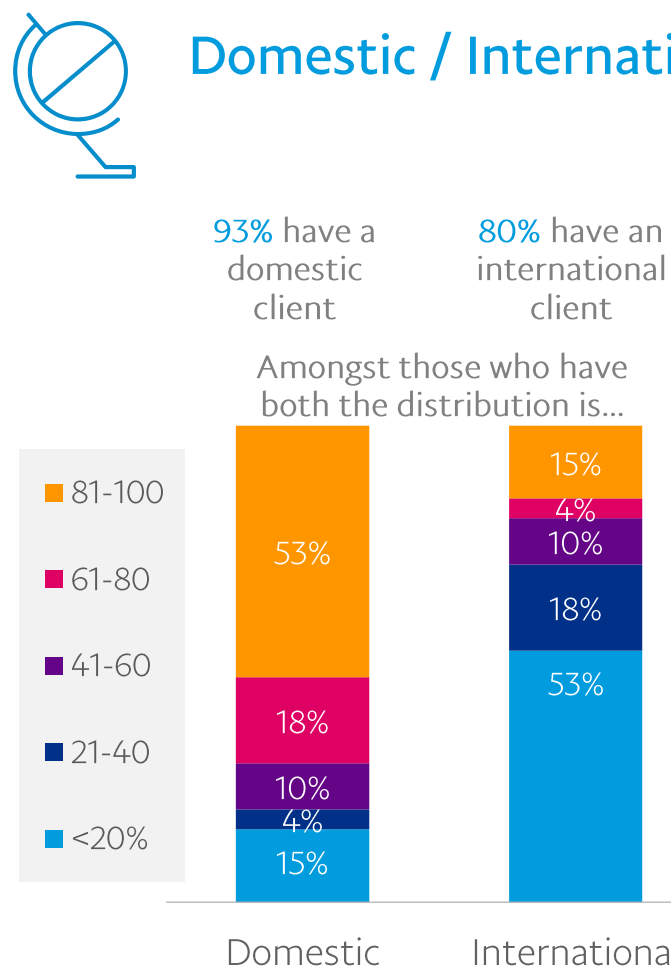
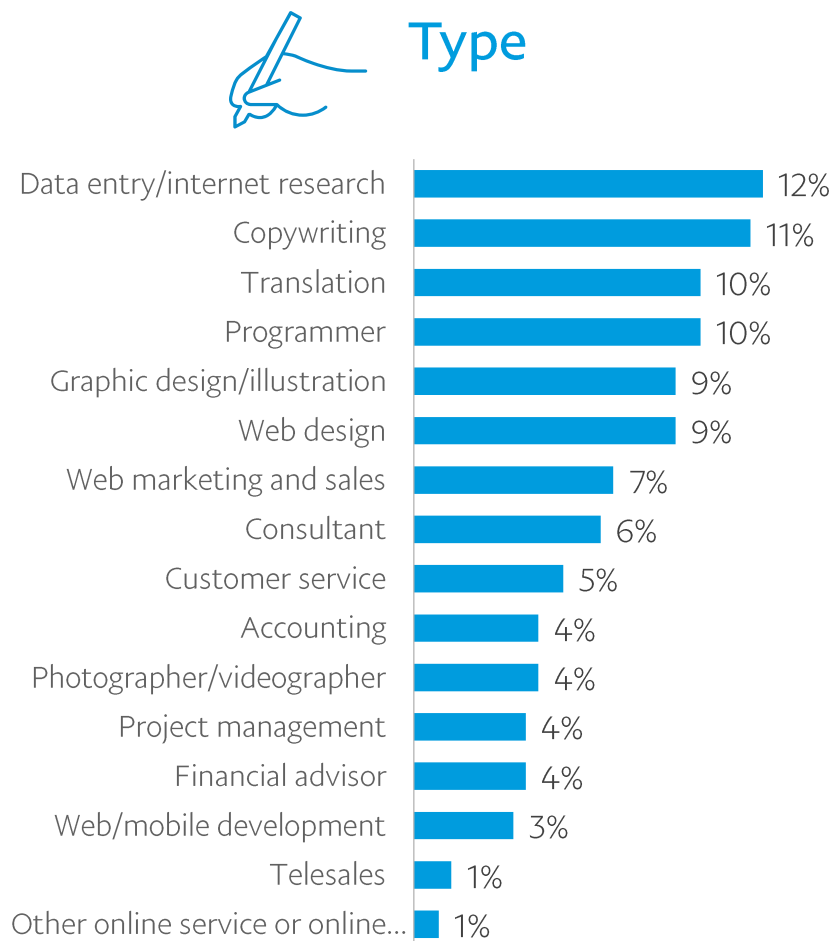


Future



Freelancing has diversity of business and customers

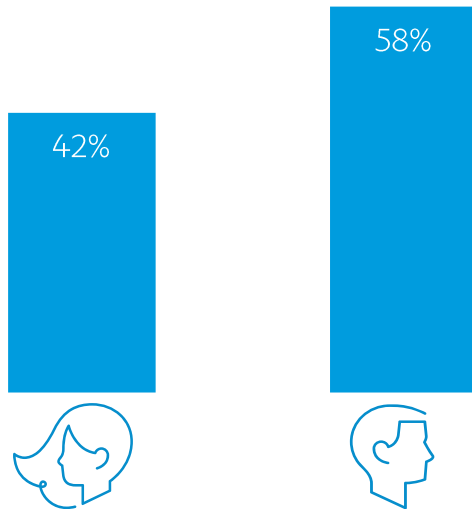
4 in 5 Freelancers get some international work, this comes from US and other European markets



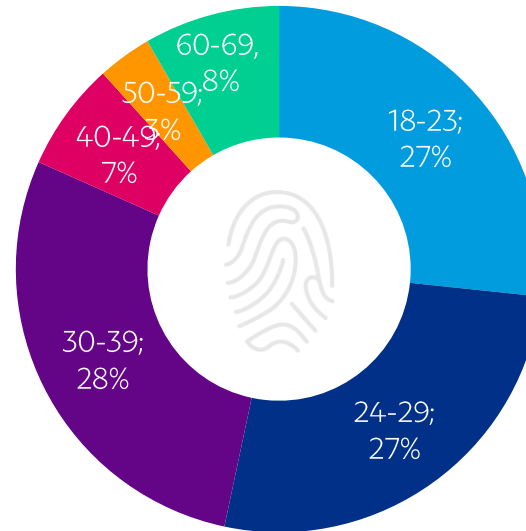
Freelance considerer profile: overview

Those planning to freelance show the same broad demographic profile as current Freelancers. 4 in 10 would be leaving full time employment

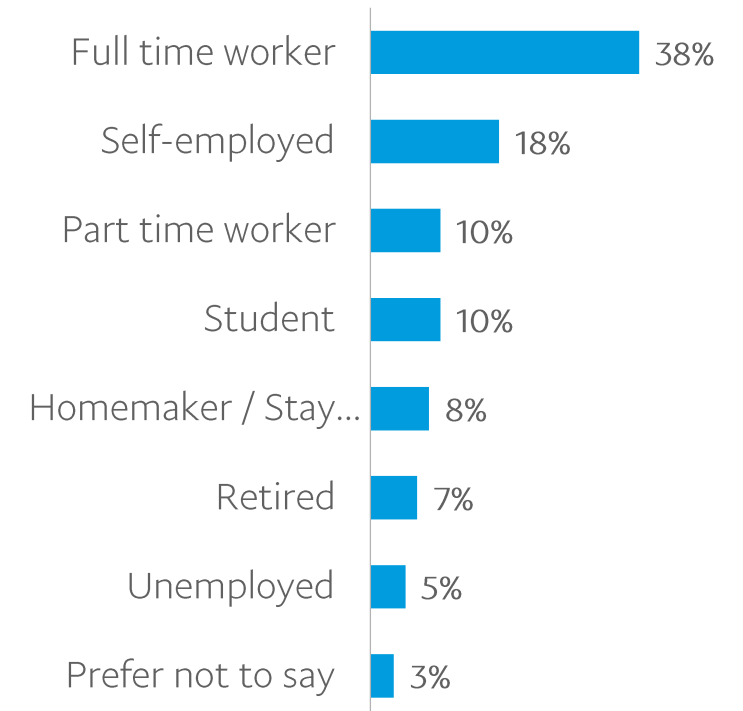
Gender profile



Age profile



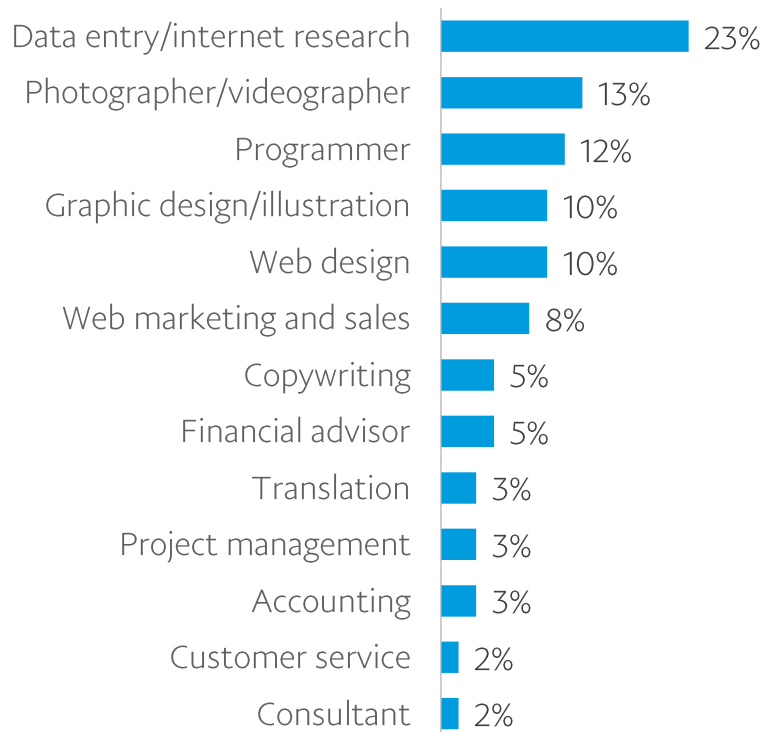
Current employment



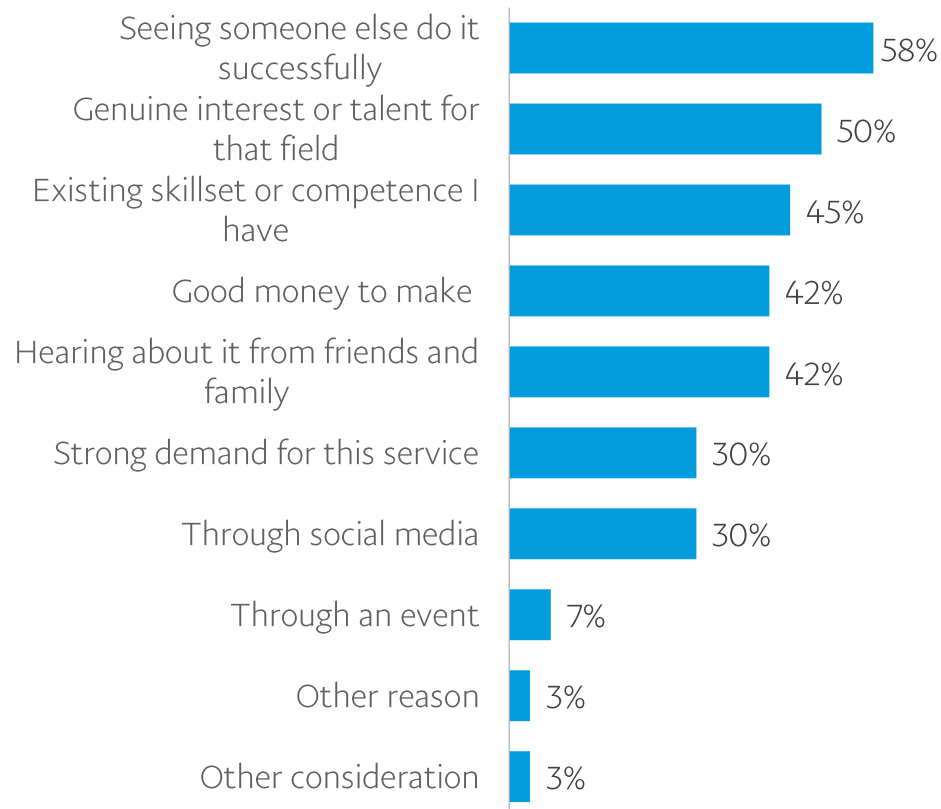
Motivation for Considerers comes from seeing someone do it successfully and having a genuine interest in the field



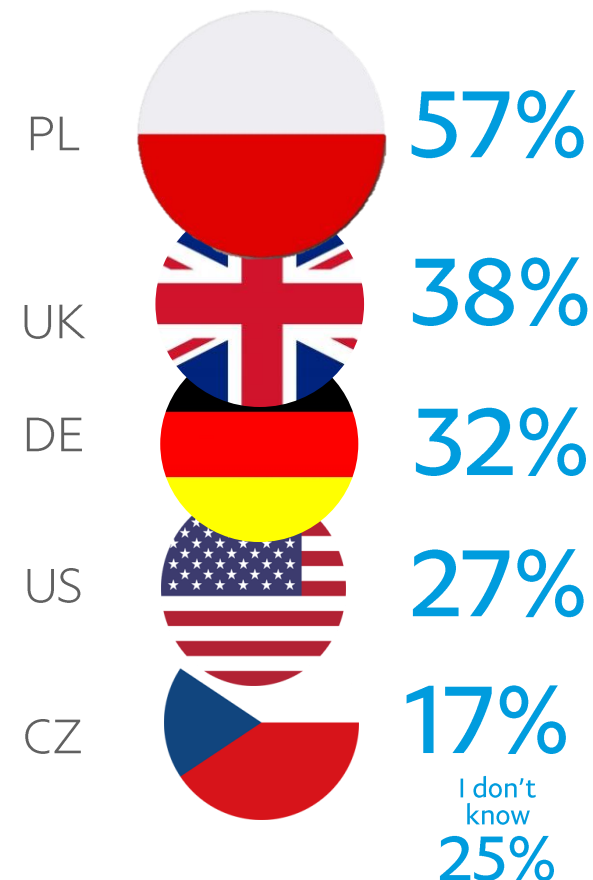
Type



Why considering freelancing?



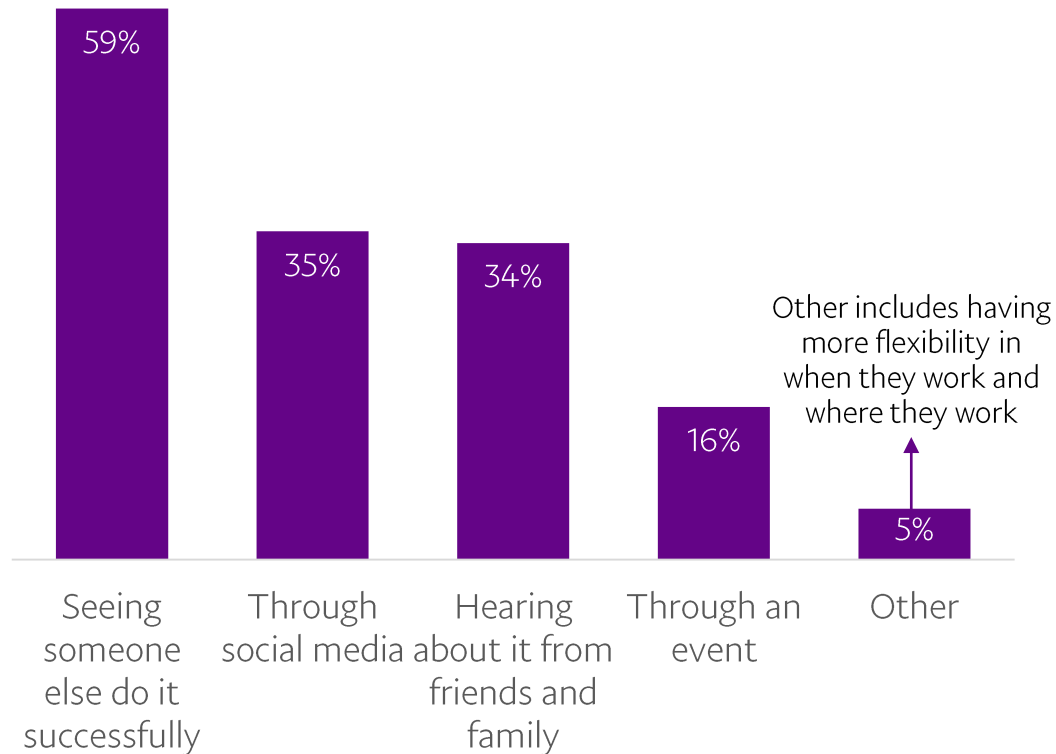
Territory



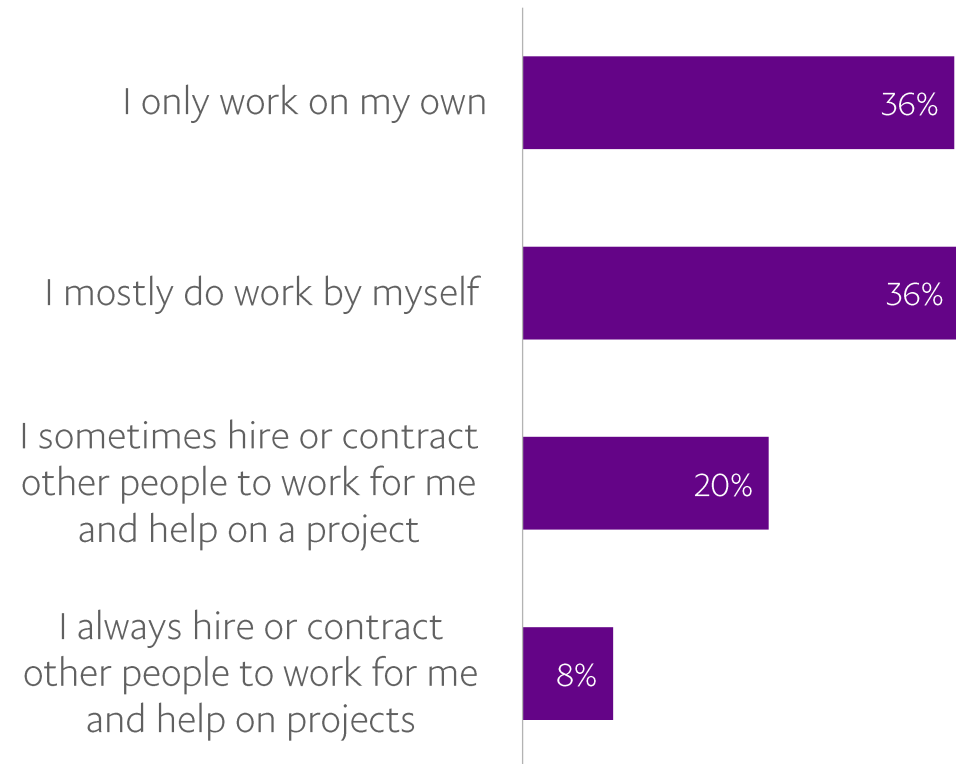
2. The Freelancing Life

Becoming a Freelancer was triggered by seeing it work for others; the work itself is largely done solo

Why considered freelancing



Work solo or collaboratively?



Base: Freelancers (n=240)

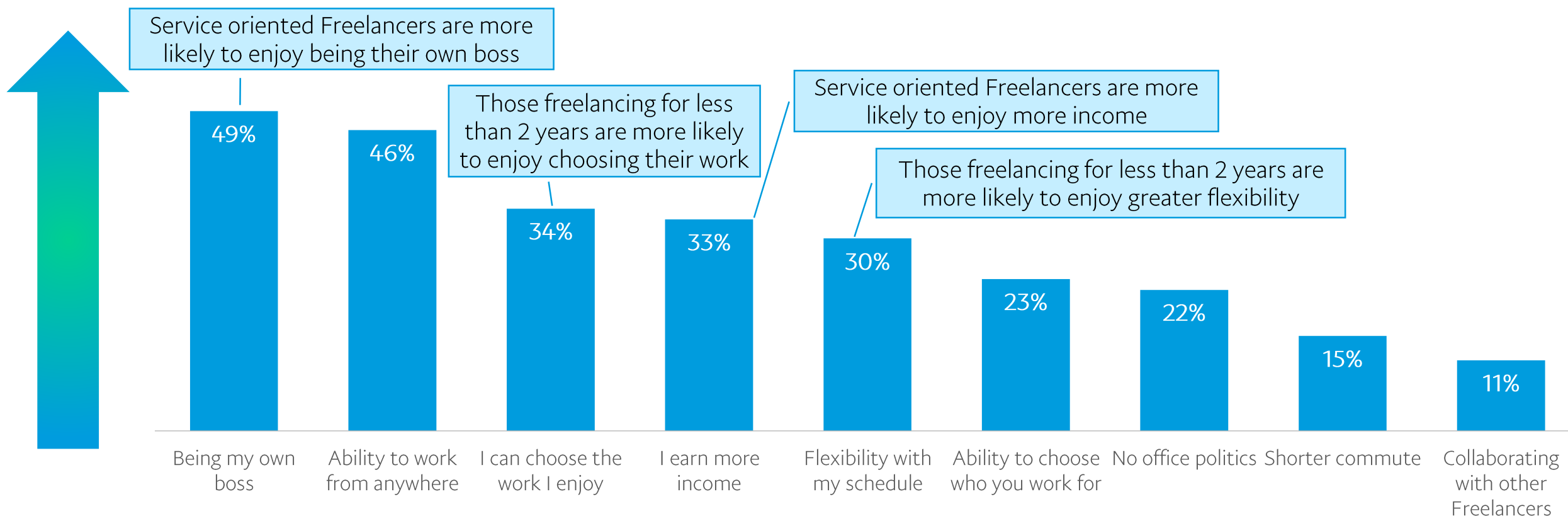


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The autonomy of freelancing is its greatest appeal

Being their own boss and having the flexibility to work anywhere they want are most appealing to Freelancers

Likes



Base: Freelancers (n=240)

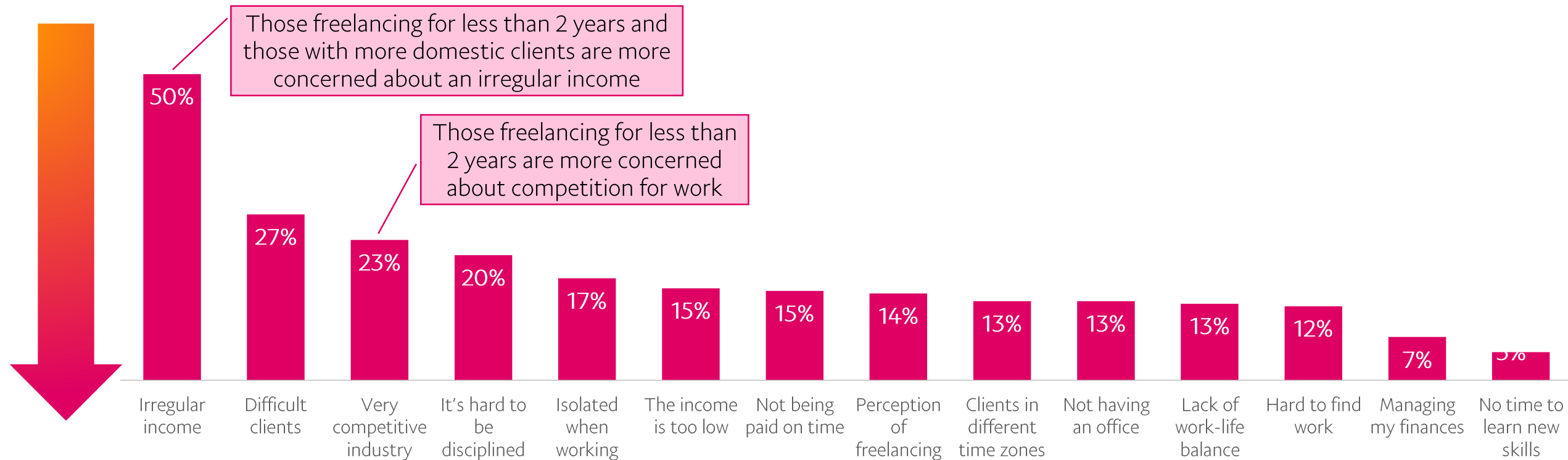


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Irregular income is the key issue for Freelancers

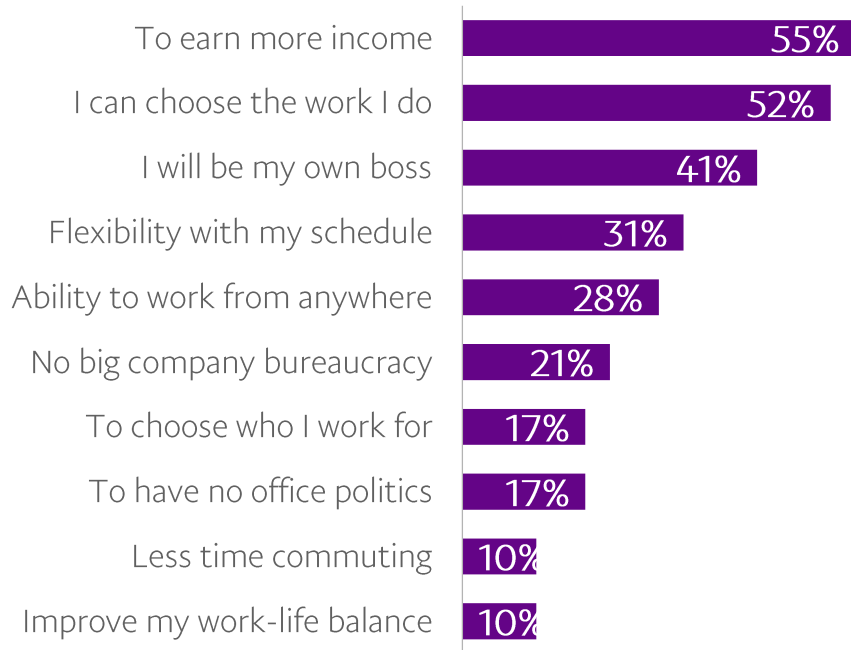
Difficult clients and competition for work are all concerns as well

Dislikes



Increasing income is a key driver for Considerers along with having more choice in the work they do and being their own boss

Reasons for freelancing



Work solo or collaboratively?



Training?

35% Yes, online

15% Yes, offline

55% No

The majority of Freelancers are keen to receive support and information about freelancing

Freelancers are keen to learn how to attract new customers and retain current ones. Advice on learning new skills would also be appreciated

What do they want to hear about?



Where do they currently get this info?



Freelancers have a wide range of support needs where they are open to assistance

What do different types of Freelancers want to hear about? – Key differences

Freelancers with a more domestic client base are more likely to seek support for help with their website

Those freelancing for less than 2 years are more likely to seek support on legal issues such as contracts

Web development Freelancers are more likely to seek support for money management and payment protection issues

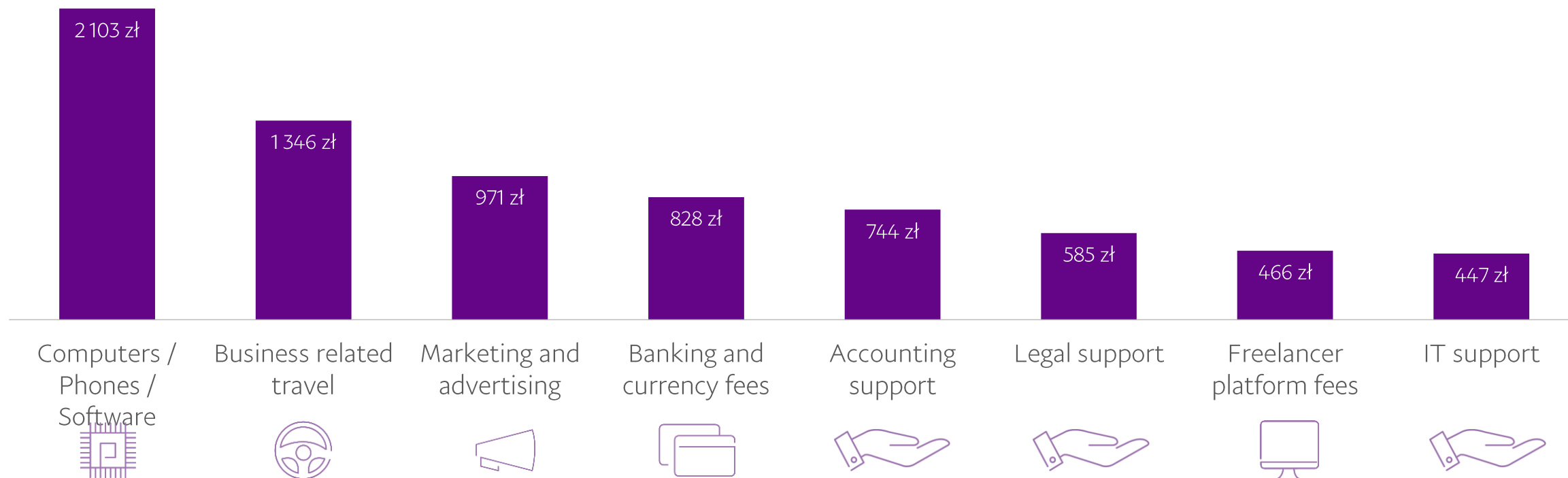
Where do they currently get this info? – Key differences

Service oriented Freelancers are more likely to use online blogs, forums or podcasts for support

Those freelancing for less than 2 years are more likely to use online blogs, forums or podcasts for support

Current Freelancers spend most on computers, phones and software

The average annual spend on Freelancer platforms is around \$130 and banking/currency fees is just short of \$230

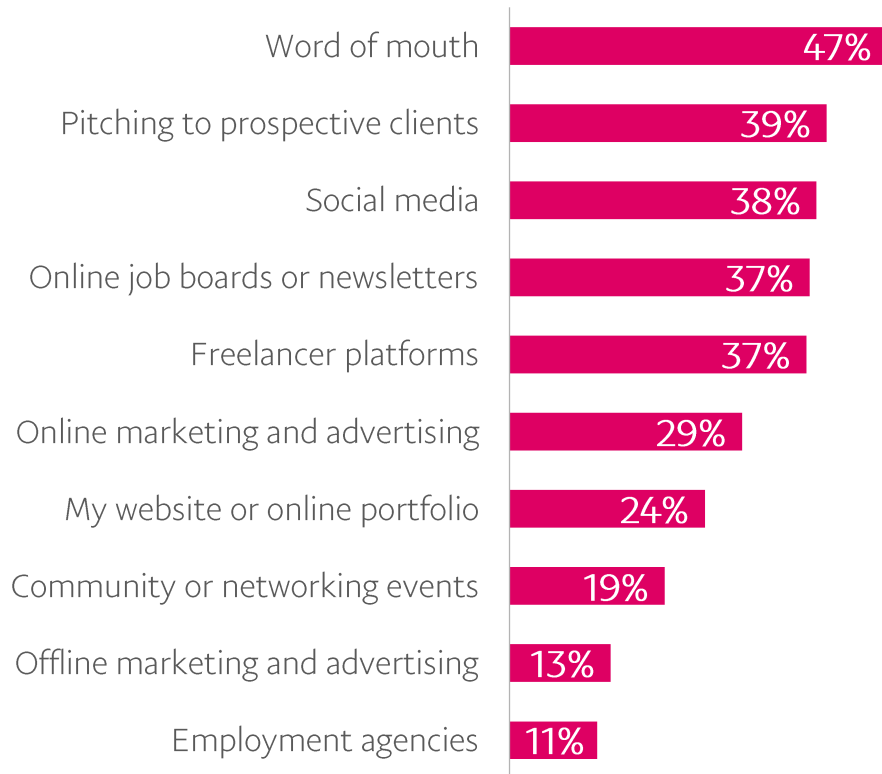


Base: Freelancers (n=240)

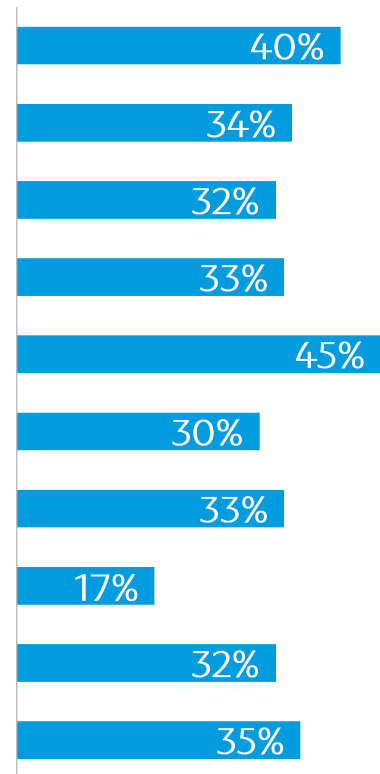
3. Getting Work & Use of Freelancing Platforms

Almost half of Freelancers, particularly those with a domestic focus, receive work through word of mouth

Self-Marketing



Work as a Result of Marketing



Service oriented Freelancers

Social media and pitching to clients play bigger roles

Those freelancing for longer

Word of mouth and their own website play bigger roles

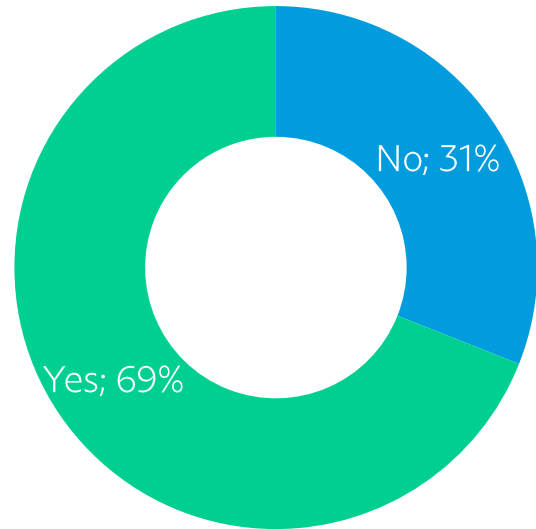
Those with more domestic clients

Word of mouth, social media and pitching to clients play bigger roles

Over two thirds of Poland's Freelancers currently use a Freelancer platform

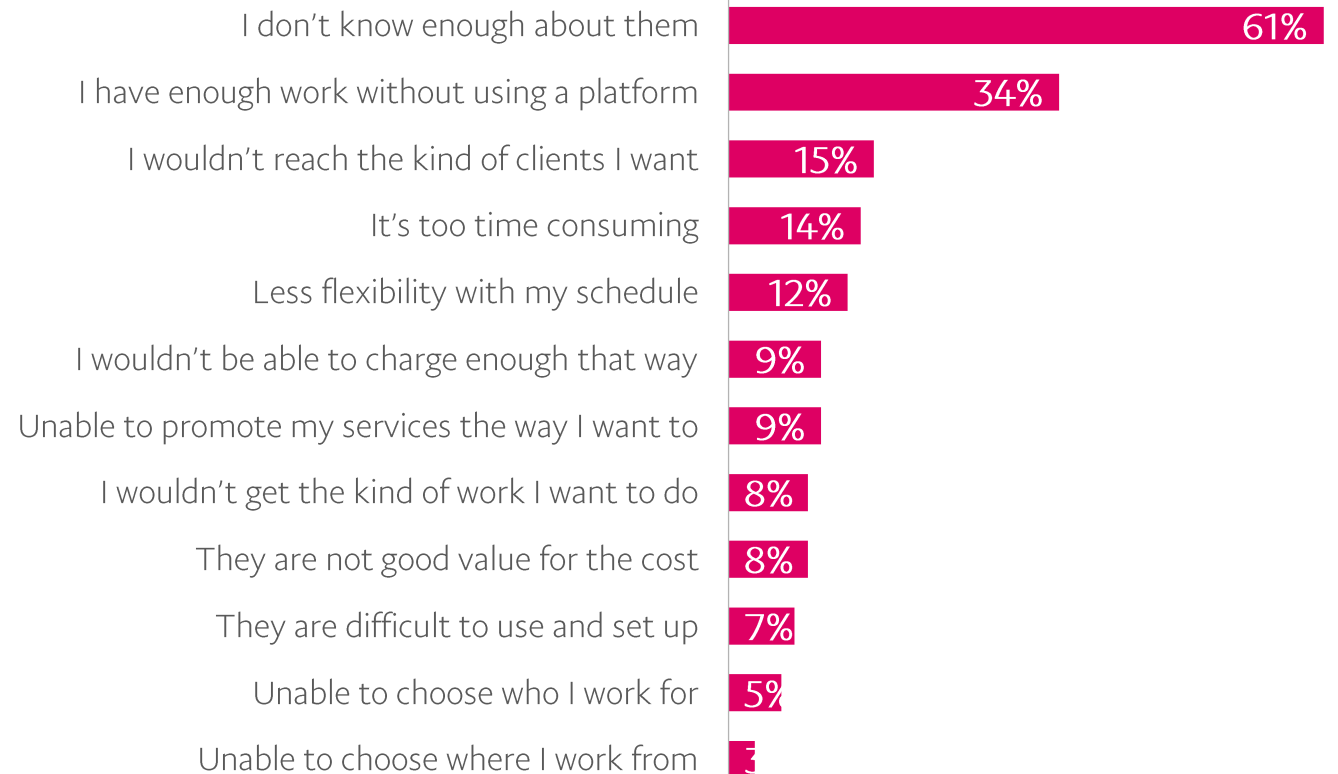
Those who don't often either lack knowledge of what they are or get enough work without them

Whether used a platform



Freelancers with more international than domestic clients are more likely to be using a Freelancer platform

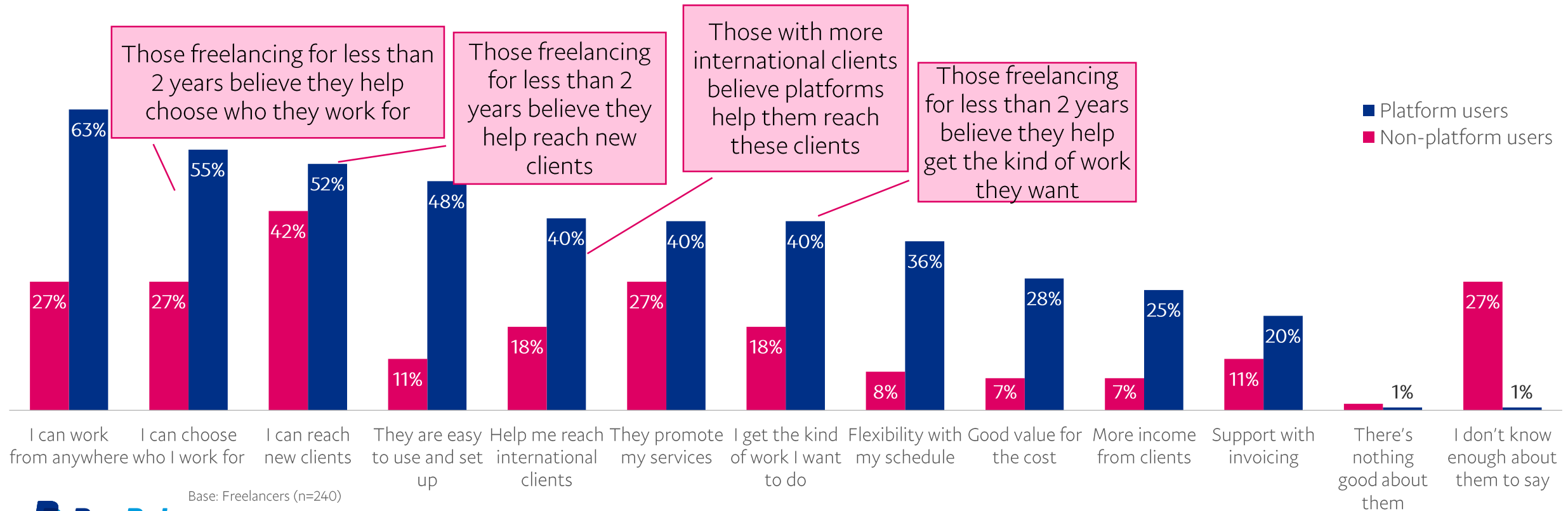
Barriers to using Freelancer platforms



The majority of those using Freelancer platforms foresee using them more in the future as it provides flexibility in where they work and who they work for as well as helping them reach clients

Positives

65% of those using Freelancer platforms say they will use them more in the future

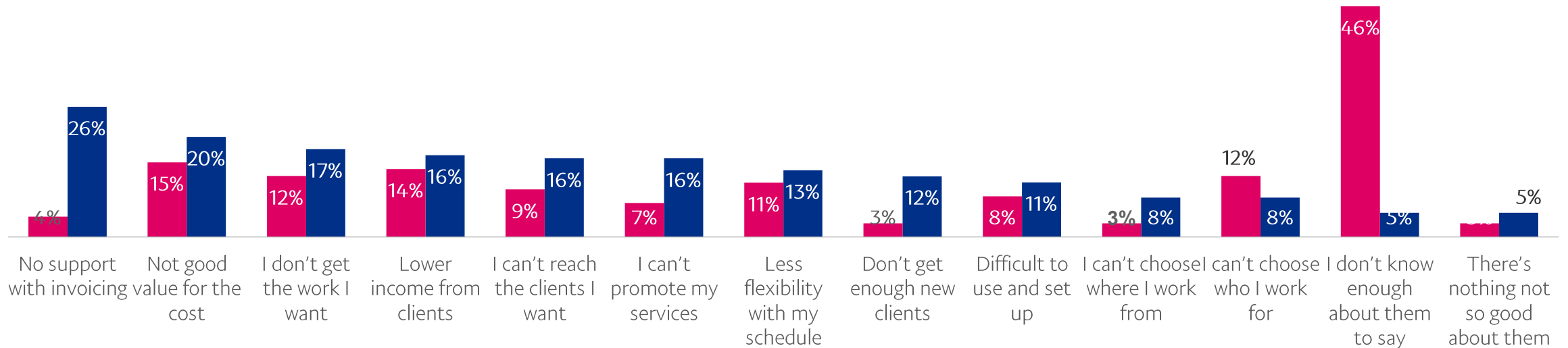


Few who currently use Freelancer platforms would use them less in the future

Despite being likely to continue using them there are concerns – lack of support, value for money and not getting enough of the work they want

Negatives

7% of those using Freelancer platforms say they will use Freelancer platforms less in the future

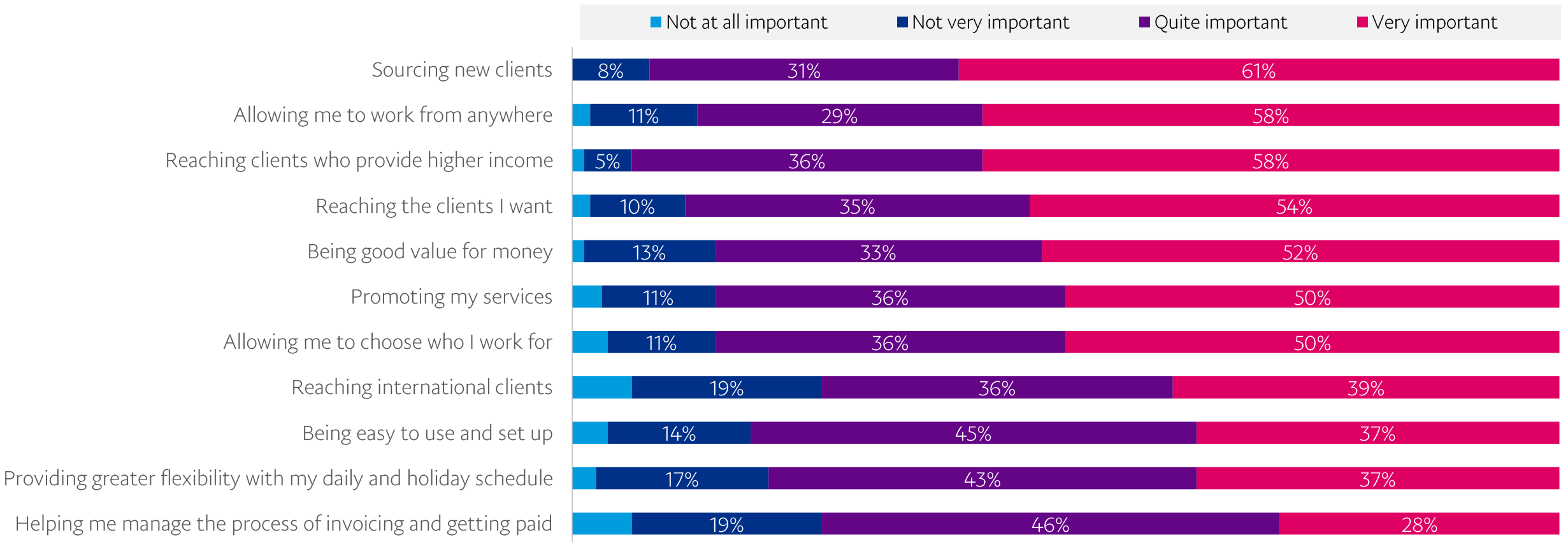


■ Platform users
■ Non-platform users

The ability to source new clients is most important to Freelancers when choosing a platform

Flexibility in where they work and reaching higher income clients are key as well

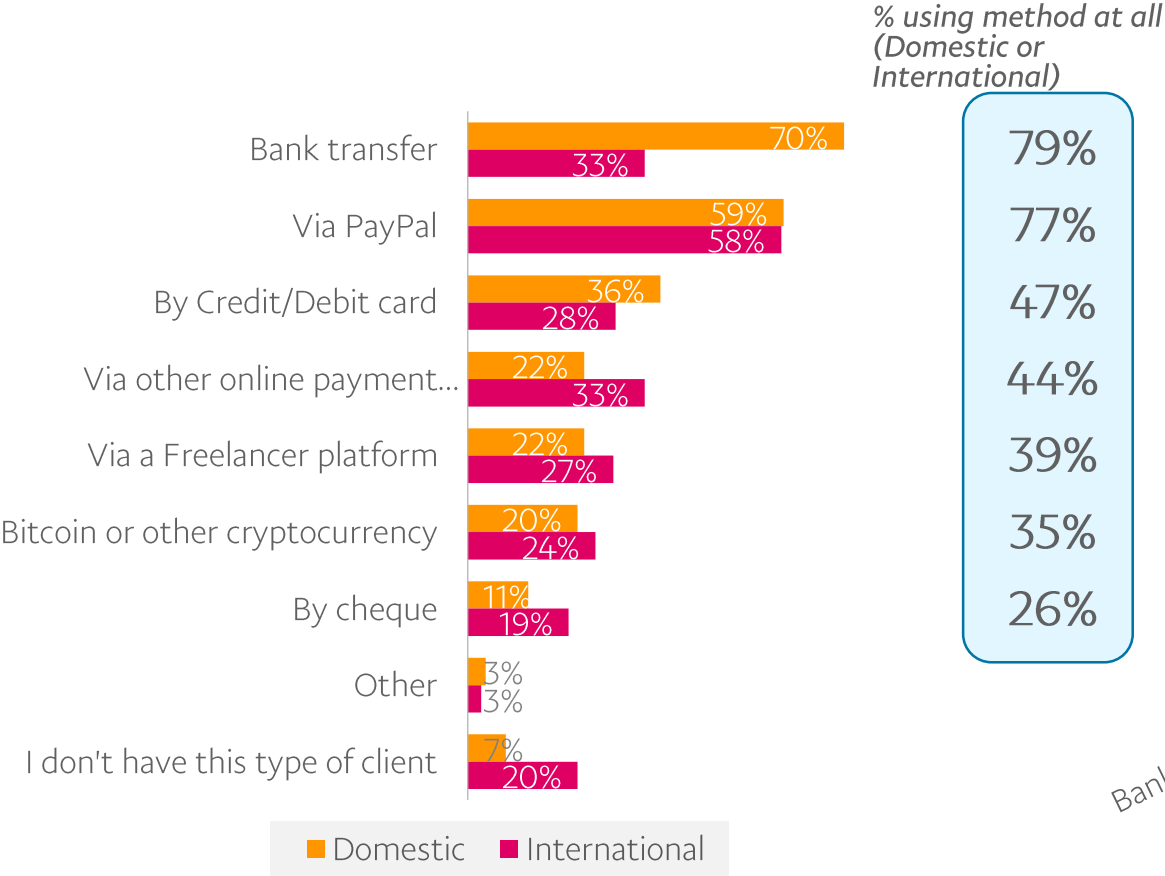
Important platform features



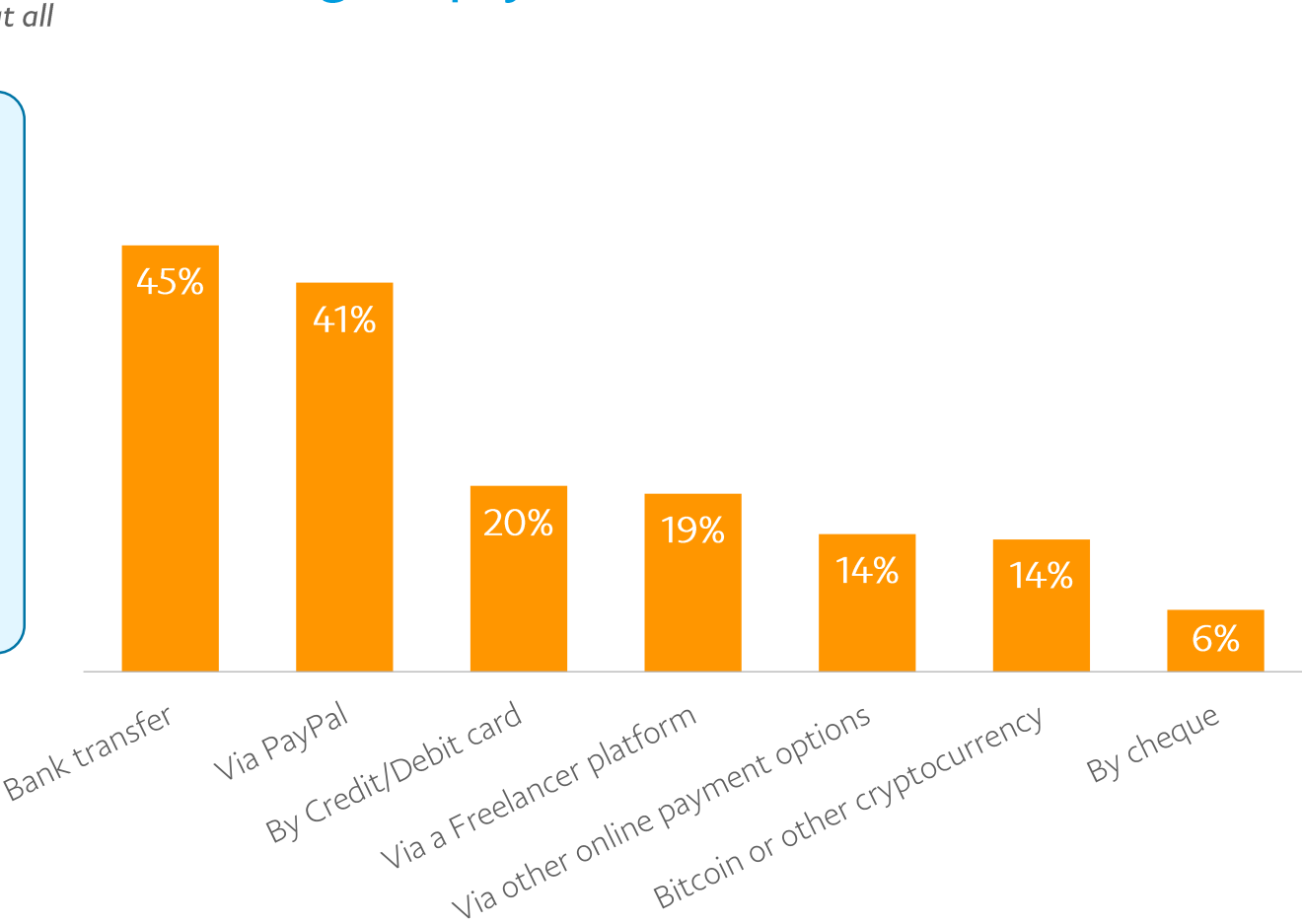
4. Dealing with Money

PayPal is by far the most popular payment choice for International clients while bank transfers do the job for domestic clients

Main methods



Percentage of payments

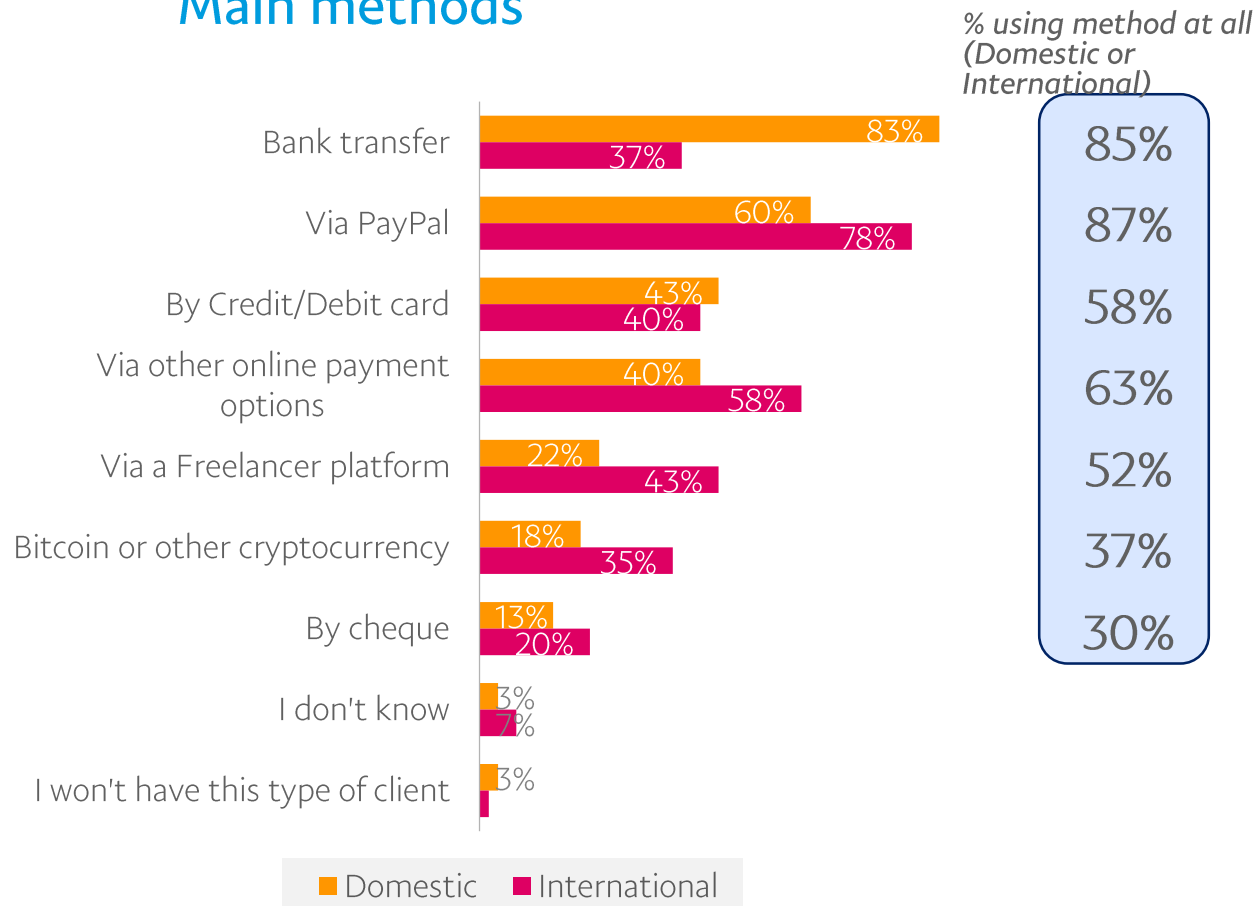


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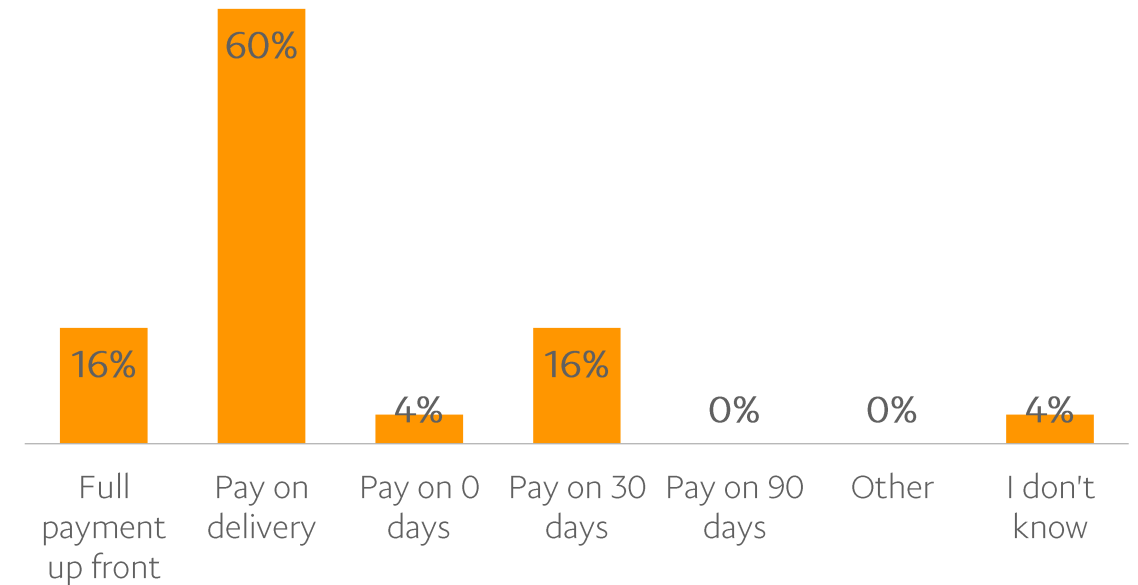
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Considerers expect to largely be paid by bank transfer by domestic customers but PayPal by international clients

Main methods



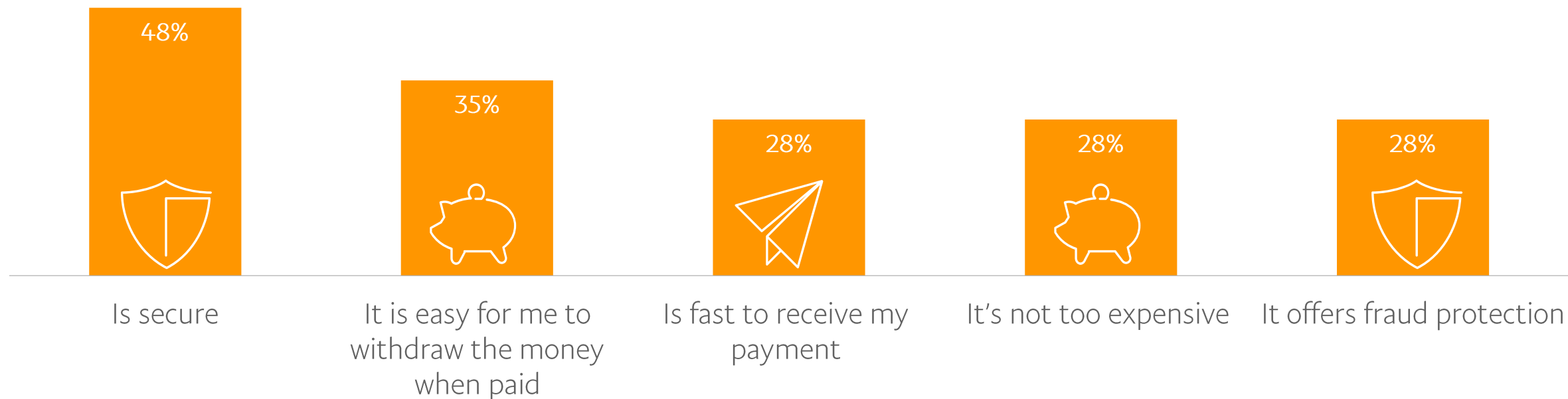
Payment terms



Security is key when Freelancers decide how to accept payment

Ease of withdrawal, speed of payment, expense and fraud protection are important too

Importance when selecting payment method to accept – Top 5 reasons

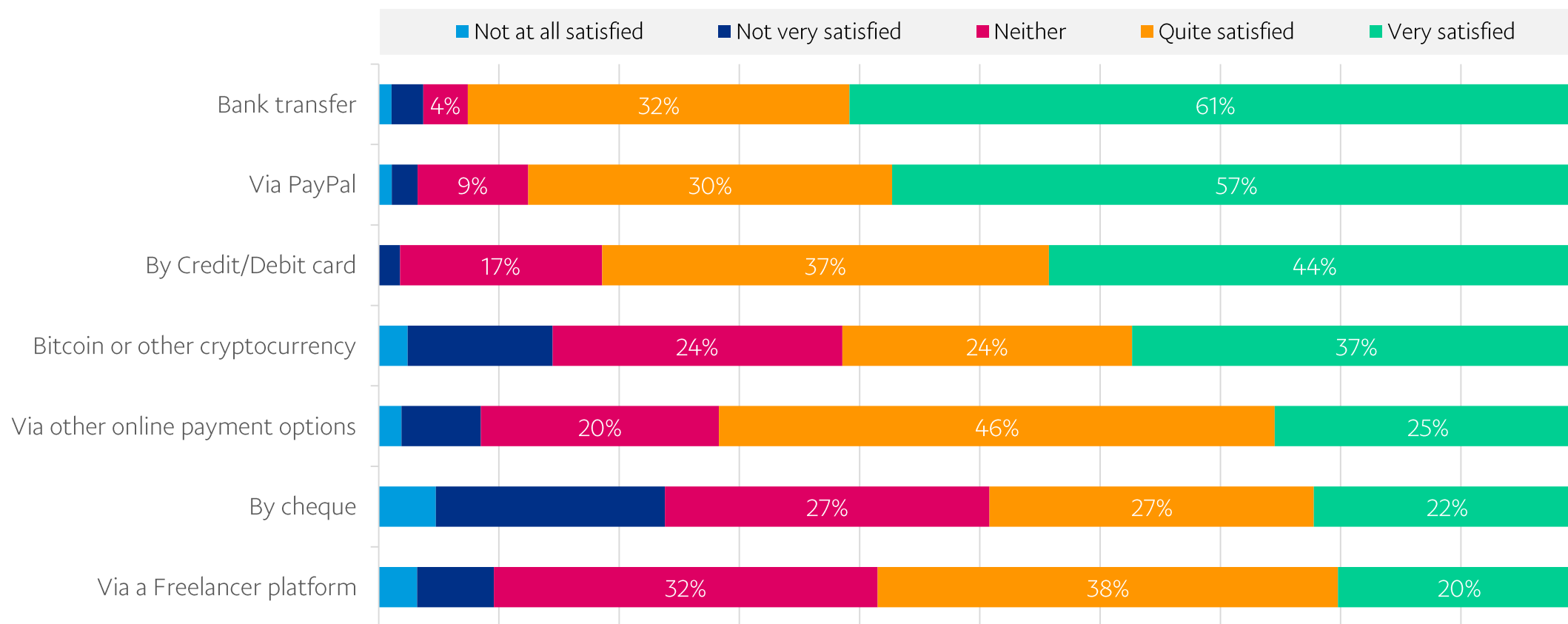


Base: Freelancers (n=240)

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Freelancers are most satisfied with clients that use bank transfers or PayPal

Satisfaction



Base: Freelancers using this method of payment – bank transfer (n=189), cheque (n=63), PayPal (n=185), Other online method (n=106), Freelancer platform (n=94), Debit/Credit card (n=113), Bitcoin (n=83)



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Familiarity, security, ease and expense are aspects which drives the appeal of payment methods

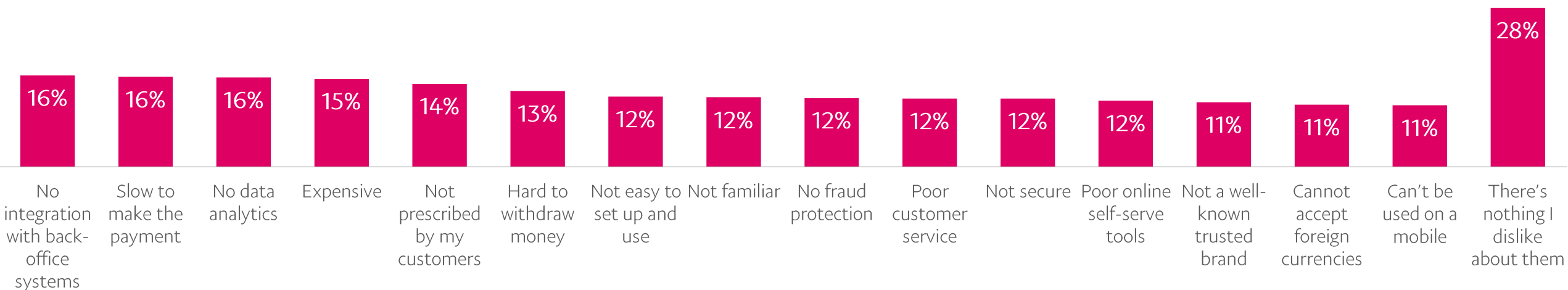
Likes



Current payment methods can be improved

Common dislikes include lack of integration with back-office systems, slow processing, lack of data analytics and being expensive

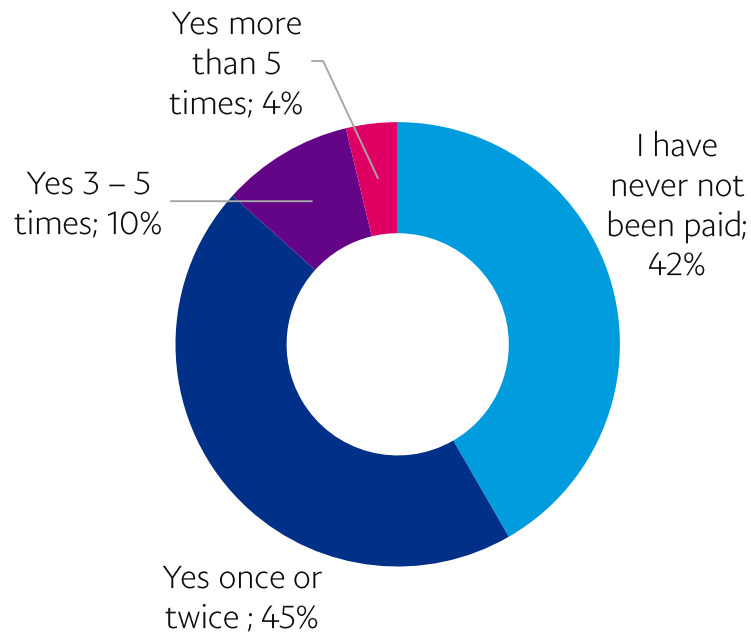
Dislikes



Over half of Freelancers have had issues with being paid

There is a belief amongst those who have not been paid that Freelancers are not taken seriously, and often there are disputes surrounding payment terms

Disputes



Reasons

