

External Workforce Insights 2018:  
The **Forces** Reshaping  
How Work Gets Done

# The multi-channel workforce is on the rise

## Focus your forces

In collaboration with Oxford Economics, we conducted a global research study examining the rapid growth of the external workforce—non-payroll workers and services providers—and its far-reaching implications for both employers and employees.

# 44%

of workforce spend is on the external workforce

Those who manage external labor effectively are finding it to be a driver of competitive advantage.

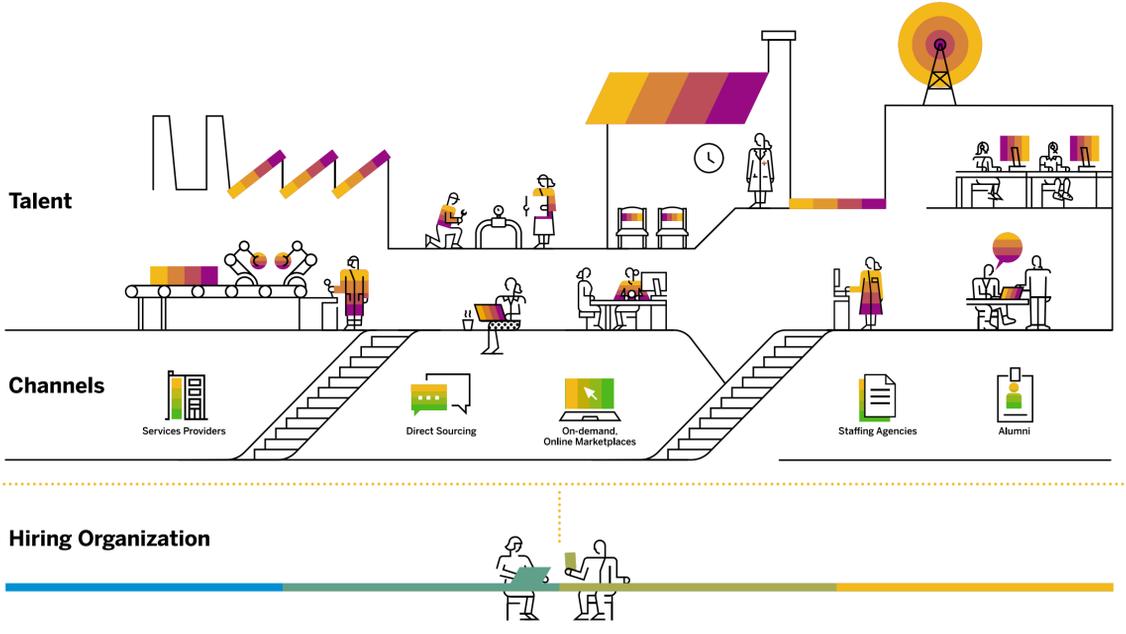
Our analysis of the survey data surfaced four key forces that are transforming the way work gets done.



Force One

## The multi-channel workforce is on the rise

The external workforce is increasingly important to **business performance**. Companies that effectively source their external workforce from multiple channels will have a **competitive advantage**.



### Individual preferences and globalization help drive labor market changes

Which of the following labor market trends are most affecting your business?

● Ranked 1<sup>st</sup> ● Ranked 2<sup>nd</sup> ● Ranked 3<sup>rd</sup>

Availability of talent that prefers to work on a contract basis, versus being an employee



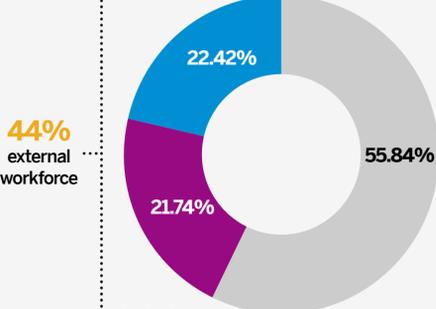
Globalization of labor supply creating greater access to talent



### The external workforce is rewriting corporate budgets

What is the split of your organizational spend across employees, non-payroll workers, and services providers?  
*Mean responses shown*

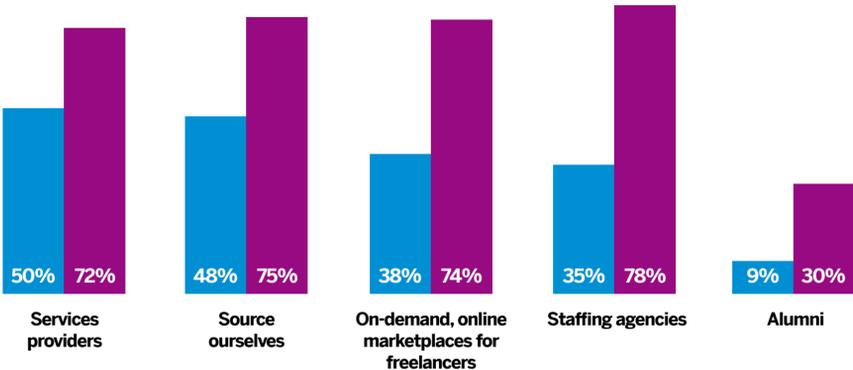
● Services providers ● Non-payroll workers ● Employees



### The multi-channel workforce shows no signs of slowing down

Through which of the following sources do you hire your external workforce today? In three years?  
*"Very often" and "Always" responses*

● Today ● In three years



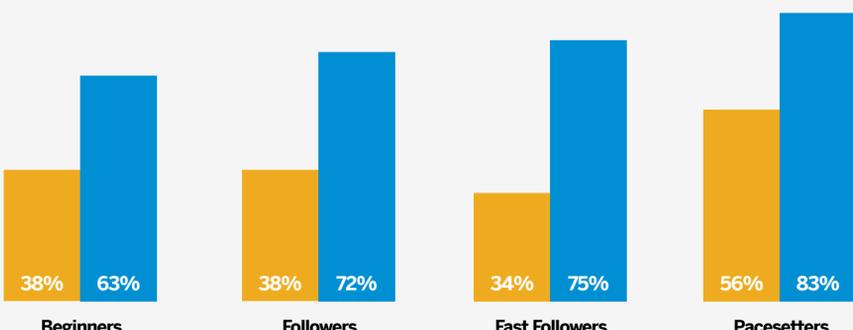
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## Pacesetters embrace on-demand, online marketplaces

Pacesetters—survey respondents who demonstrate superior performance in managing and realizing value from the external workforce—lead the pack in the **adoption of digital tools to source external labor**.

To what extent does your organization use on-demand, online marketplaces for freelancers today? In three years?  
*"Very often" and "Always" responses*

● Today ● In three years



## Take action

Capture the full value of the workforce transformation by managing your external workforce more effectively:

- ✓ **Apply workforce strategies** to all labor sources, both external and traditional.
- ✓ **Anticipate the skills you will need** in the future—and those in short supply. Determine a strategy to acquire, retrain, or source these skills through the external multi-channel workforce.
- ✓ **Embrace the external workforce** for the skills and ideas that this talent brings and make it a part of organizational objectives and purpose.

## Explore the other forces impacting the way work gets done today.

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