

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

Cost is not the whole story

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.



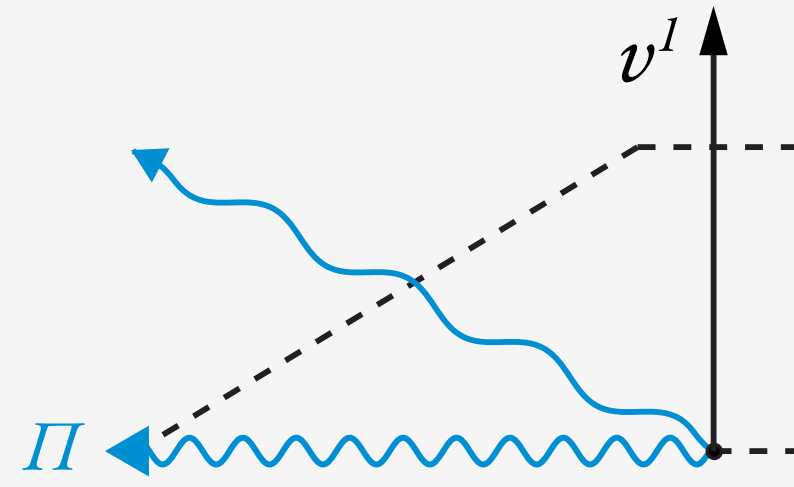
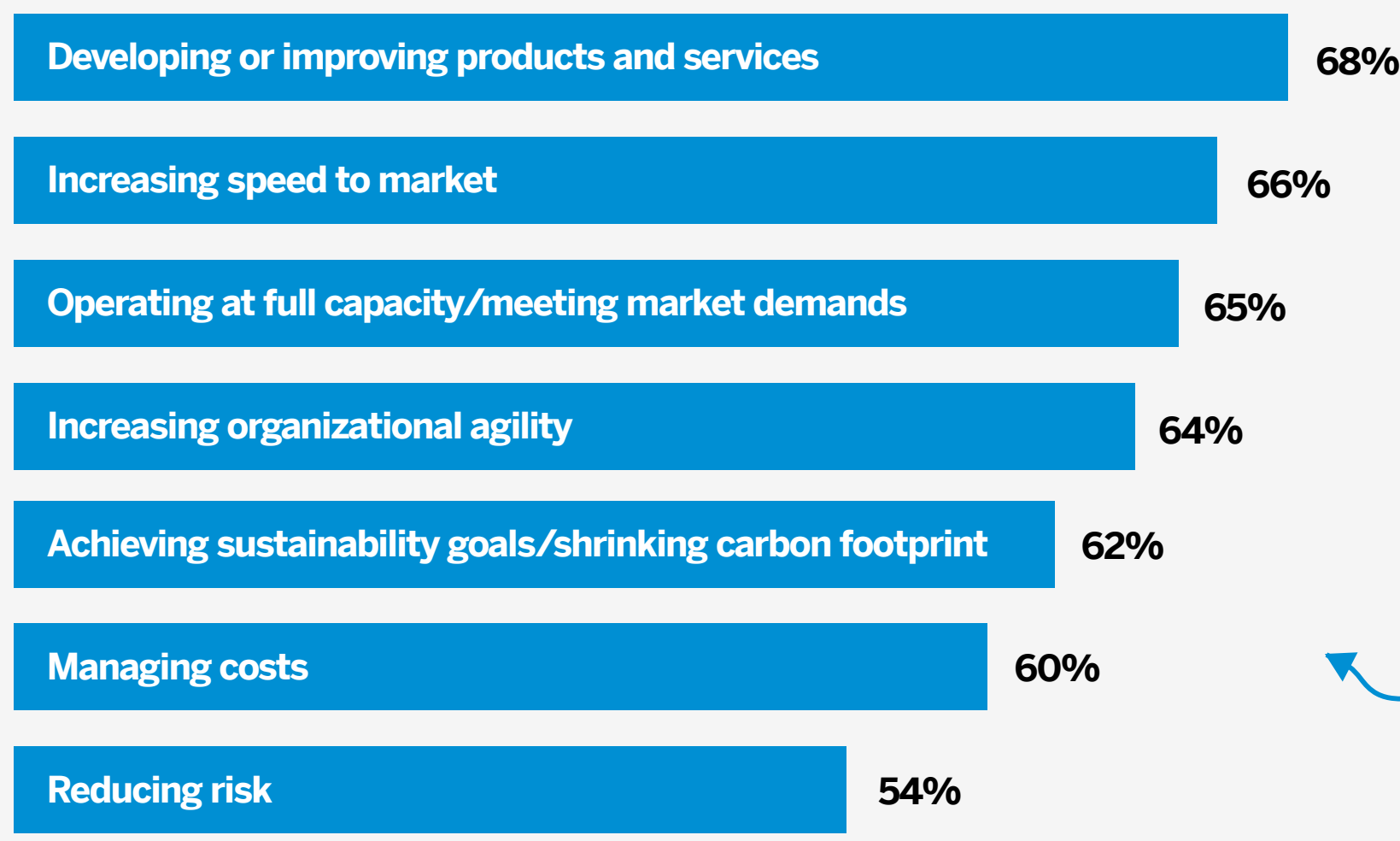
Force Three

Cost is not the whole story

While still important, **controlling costs is not the primary driver** for using an external workforce. Other business objectives are more important.

Our study provides a new and expansive view of the the value of the external workforce

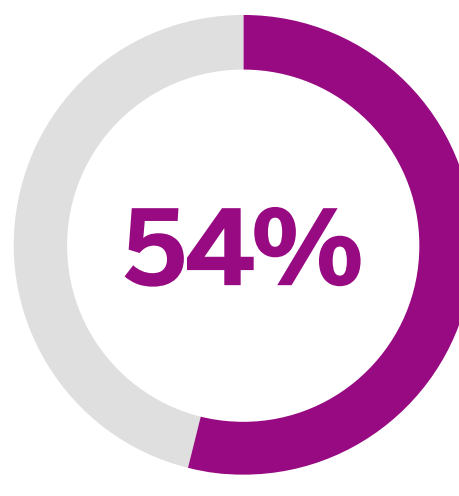
How important is the external workforce in meeting the following business goals?
"Important" and "Very important" responses



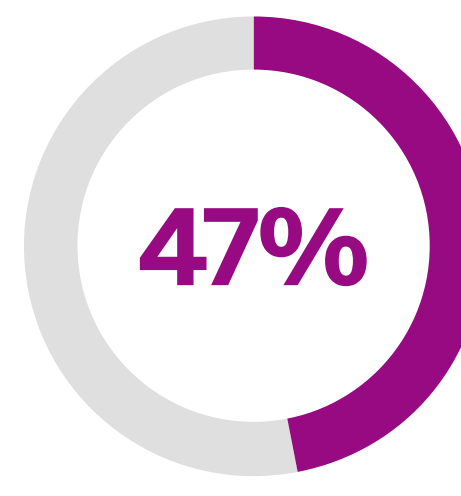
Companies depend on the external workforce to achieve strategic objectives



say the external workforce is a key enabler of business performance



say it provides them with the flexibility to respond to opportunities when and where they arise



say it helps them compete in a digital world

Executives say the external workforce delivers value beyond traditional business metrics

61%

say the external workforce challenges employees to do their best work

54%

say it improves their culture by bringing in people with different backgrounds and experiences

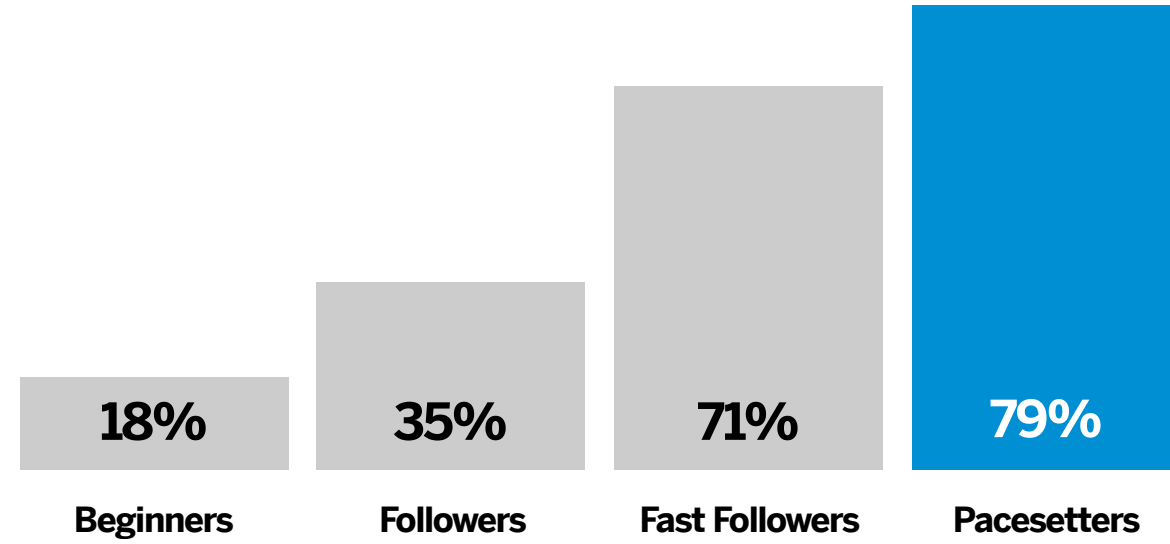
49%

say it connects the workforce to new ideas

Pacesetters use the external workforce to stay competitive

Pacesetters—survey respondents who demonstrate superior performance in managing and realizing value from the external workforce—**use external labor to drive business outcomes.**

Nearly 80% of Pacesetters say their external workforce is a key enabler of business performance



Take action

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

- ✓ **Assess your strategic needs** and consider where external workers can help you accomplish these goals.
- ✓ **Know the true value** of your external workforce, whether they are most critical to getting products to market faster, providing difficult-to-access skills, driving digital transformation efforts, or controlling costs.

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

Visit externalworkforce.fieldglass.com to view the rest of the story and access our full report.