

# US Contingent Workforce (Staffing) Provider PEAK Matrix®

## Assessment 2021 – Going Beyond Scale

June 2021: Complimentary Abstract / Table of Contents



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Tracking: service providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

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## Background of the research

Contingent workforce (staffing) industry in the US experienced sustained growth rate up to 2019. In 2020, the industry saw major disruption on account of the pandemic, with use of contingent staffing falling drastically across the country. Despite these circumstances, service providers showed resilience and used the adversity as an opportunity to focus on improvements such as remote delivery of services, learning and upskilling, and leverage of technologies.

This report examines the dynamics of the contingent workforce (staffing) provider landscape in the US and its impact on the US contingent staffing market in 2020. It gives an overview of the market and analyzes the areas wherein service providers differentiate themselves. Based on the comprehensive Everest Group PEAK Matrix® evaluation, each of the 31 contingent workforce (staffing) providers are segmented into Leaders, Major Contenders, and Aspirants.

In this research, we focus on:

- Everest Group’s Services PEAK Matrix® evaluation, a comprehensive assessment of 31 contingent workforce (staffing) providers in the US
- Service providers’ delivery capability assessment
- Remarks on key strengths and limitations for each contingent workforce (staffing) provider
- Service provider landscape

### Scope of this report:



**Geography**  
The US



#### Service providers

Overage<sup>1</sup>: Across 31 RPO service providers in the US including Addison Group, Adecco, Aerotek, American CyberSystems (ACS Solutions), Apex Systems, Aquent, Artech, Beacon Hill Staffing Group, Collabera, Elwood staffing, Experis, Insight Global, Kelly, Kforce, Lorien, Manpower, Modis, Nesco Resource, PeopleReady, ProLogistix, Randstad, Robert Half, Select Staffing, Spectraforce, Spherion, Swoon, TalentBurst, TEKsystems, Tradesmen International, Volt Information Sciences, and Yoh



**Services**  
Contingent workforce (staffing)

<sup>1</sup> While we considered a much bigger list of contingent staffing service providers, these 31 providers are shortlisted based on their presence and meaningful play in the contingent staffing space in the US

## Overview and abbreviated summary of key messages

This report examines the dynamics of the contingent workforce (staffing) market in the US. It provides a deep-dive analysis of how the service providers shape up in terms of their market success and delivery capability. Based on the comprehensive Everest Group PEAK Matrix®, 31 US contingent workforce (staffing) providers are segmented into Leaders, Major Contenders, and Aspirants. Additionally, this report contains Everest Group’s remarks on each service provider’s strengths and areas of improvement.

Some of the findings in this report, among others, are:

### US Contingent Workforce (Staffing) providers PEAK Matrix 2021

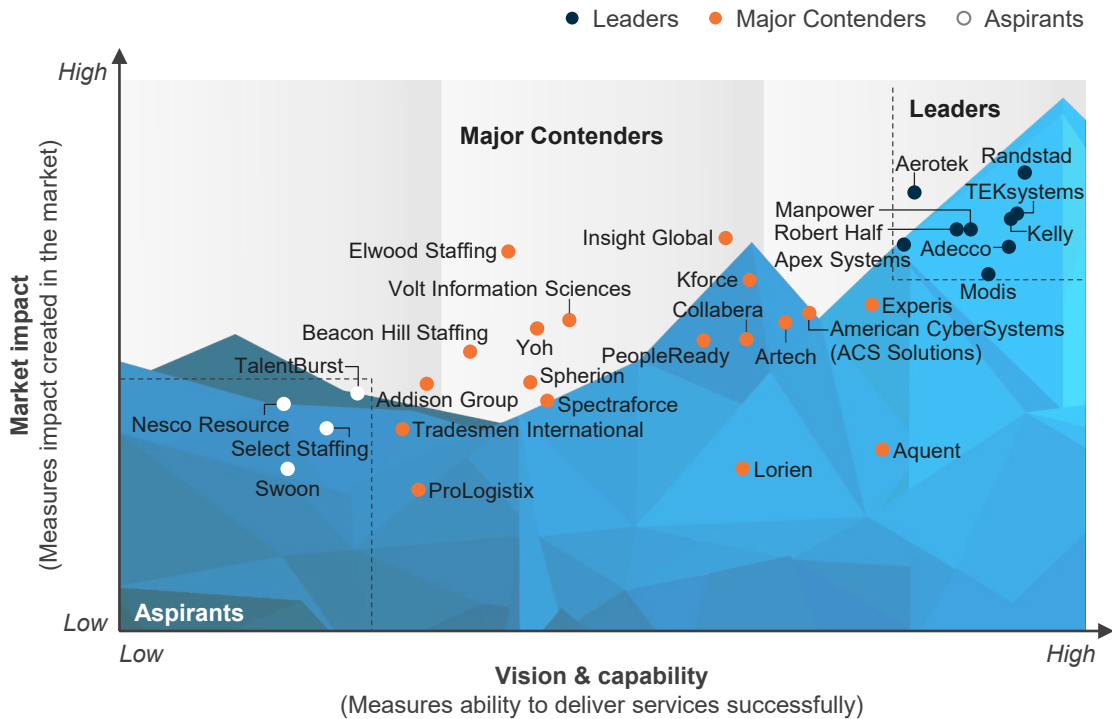
- Everest Group classifies US contingent workforce (staffing) providers based on the Everest Group PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants
- Based on Everest Group’s comprehensive evaluation framework, the PEAK Matrix®, the 31 established US contingent workforce (staffing) providers evaluated are segmented into three categories (in alphabetical order within each category):
  - **Leaders:** Adecco, Aerotek, Apex Systems, Kelly, Manpower, Modis, Randstad, Robert Half, and TEKsystems
  - **Major Contenders:** Addison Group, American CyberSystems (ACS Solutions), Aquent, Artech, Beacon Hill Staffing, Collabera, Elwood Staffing, Experis, Insight Global, Kforce, Lorien, PeopleReady, ProLogistix, Spectraforce, Spherion, Tradesmen International, Volt Information Sciences, and Yoh
  - **Aspirants:** Nesco Resource, Select Staffing, Swoon, and TalentBurst

### US Contingent Workforce (Staffing) providers commentary

- Everest Group delineates each of the 31 service providers’ strengths and areas of improvement
- The in-depth commentary is intended to help service providers, enterprise buyers and other stakeholders to understand the current situation and possible future direction of the provider landscape

# This study offers two distinct chapters providing a deep dive into key aspects of US contingent workforce (staffing) market; below are three charts to illustrate the depth of the report

US Contingent Workforce (Staffing) Providers PEAK Matrix® Assessment 2021<sup>1,2</sup>



- 1 The assessment of contingent workforce (staffing) providers is done by the brand name on which they operate and compete in the market and not by their parent / group companies
- 2 This assessment is based on Everest Group's estimates that leverage its proprietary Transaction Intelligence (TI) database, service provider public disclosures, interaction with buyers as well as inputs from providers including Adecco, Aquent, Lorien, Modis, Randstad, Spectraforce, and Swoon

Source: Everest Group (2021)

Capability assessment

Illustrative example

Measure of capability: ☐ Low ● High

Service provider	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Service provider 1	●	●	●	●	●	●	●	●	●
Service provider 2	●	●	●	●	●	●	●	●	●
Service provider 3	●	●	●	●	●	●	●	●	●
Service provider 4	●	●	●	●	●	●	●	●	●
Service provider 5	●	●	●	●	●	●	●	●	●
Service provider 6	●	●	●	●	●	●	●	●	●
Service provider 7	●	●	●	●	●	●	●	●	●
Service provider 8	●	●	●	●	●	●	●	●	●
Service provider 9	●	●	●	●	●	●	●	●	●

Everest Group's remarks on service providers

Illustrative example

Measure of capability: ☐ Low ● High

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
●	●	●	●	●	●	●	●	●

**Strengths**

- It has very strong expertise in sourcing talent for office/clerical and industrial roles, and caters to clients across all major industry verticals
- It has created an e-learning portal where associates can log in and access over 8,000 free online courses on topics including accountancy, finance, auditing, administration, HR, technology, and project management

**Areas of improvement**

- Its penetration in providing output-based, outsourcing engagements is still on the lower side, and clients specifically looking for such an offering should evaluate its capabilities carefully
- While it does have an associate-facing application, it is basic in terms of functionalities when compared with such applications from other service providers



# Research calendar

## Contingent Workforce Management

■ Published
 ■ Planned
 ■ Current release

### Flagship reports

	Release date
Contingent Workforce Management (CWM) – Service Provider Landscape with Services PEAK Matrix® Assessment 2020	August 2020
Tackling the Global Pandemic: Contingent Workforce Management (CWM) State of the Market Report 2021	October 2020
Vendor Management System (VMS) Products PEAK Matrix® Assessment with Technology Vendor Landscape 2021	March 2021
<b>US Contingent Workforce (Staffing) Provider PEAK Matrix® Assessment 2021 – Going Beyond Scale</b>	<b>June 2021</b>
VMS – Service Provider Profile Compendium 2021	Q3 2021
VMS State of the Market Report 2021	Q3 2021
Contingent Workforce Management (CWM) / Managed Service Provider (MSP) and Services Procurement / Statement of Work (SOW) PEAK Matrix® Assessment 2021	Q3 2021

### Thematic reports

	Release date
Collaboration to beat disruption – Future of CWM	July 2020
Data & Analytics – Foundational Pillars of Efficient Services Procurement Management	August 2020
The Evolution of Vendor Management Systems (VMSs) for Contingent Workforce Management: What Will Differentiate the VMSs in the Future?	December 2020
A Practical Approach to Total Talent Acquisition	February 2021
Disruption in IT Staffing	May 2021
MSP 4.0	Q3 2021
Demystifying Direct Sourcing	Q3 2021

Note: For a list of all of our published Contingent Workforce Management reports, please refer to our [website page](#)



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