

US Contingent Staffing Services PEAK Matrix® Assessment 2022

July 2022: Complimentary Abstract / Table of Contents



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Background of the research

Contingent staffing industry in the US experienced sustained growth rate up to 2019. The industry experienced contraction in 2020 on account of pandemic-led disruption and subsequent fall in demand of contingent staffing across the country. However, 2021 was marked by significant surge in demand for contingent staffing services across the board due to rapid rise in talent demand-supply gap, labor pyramid distortion, and the Great Resignation. The industry leveraged this opportunity and made investments to improve capabilities in areas gaining prominence such as capabilities to deliver managed services, learning and upskilling, Diversity, Equity, and Inclusion (DE&I) and leverage of technologies.

This report examines the dynamics of the contingent staffing provider landscape in the US and its impact on the US contingent staffing market in 2021 from the lens of IT staffing, engineering staffing, and business & professionals staffing. It gives an overview of the market and analyzes the areas where service providers differentiate themselves. Based on the comprehensive Everest Group PEAK Matrix® evaluation, each of the 33 contingent staffing providers are segmented into Leaders, Major Contenders, and Aspirants.

In this research, we focus on:

- Everest Group's US IT Contingent Staffing Services PEAK Matrix evaluation, a comprehensive assessment of 27 contingent staffing providers in the US
- Everest Group's US Engineering Contingent Staffing Services PEAK Matrix evaluation, a comprehensive assessment of 19 contingent staffing providers in the US
- Everest Group's US Business & Professionals Contingent Staffing Services PEAK Matrix evaluation, a comprehensive assessment of 20 contingent staffing providers in the US
- Service providers' delivery capability assessment
- Remarks on key strengths and limitations for each contingent staffing provider
- Service provider landscape

Scope of this report



Geography
The US



Providers

Coverage¹: across 33 staffing service providers in the US including Actalent, Addison Group, Adecco/LHH, Akkodis, American CyberSystems (ACS Solutions), Apex Systems, Artech, Aston Carter, Beacon Hill Staffing, Collabera, DISYS, Elwood Staffing, Experis, Hays, Insight Global, Integrity Staffing, Kelly, Kforce, Lorien, Manpower, Motion Recruitment, Nesco Resource, Randstad, RGP, Robert Half, Rose International, Spectraforce, Swoon, System One, TalentBurst, TEKsystems, Volt Workforce Solutions, and Yoh



Services
Contingent staffing

¹ While we considered a much bigger list of contingent staffing service providers, these 33 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 US contingent staffing provider landscape and its impact on the contingent staffing market. It focuses on provider position and growth in contingent staffing market, changing market dynamics and emerging provider trends, assessment of provider delivery capabilities, and key contingent staffing provider profiles. It also identifies the key implications of the research findings for buyers and providers.

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

US IT Contingent Staffing Services PEAK Matrix® 2022

Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix®, the 27 established contingent staffing service providers evaluated are segmented into three categories (in alphabetical order within each category):

- **Leaders:** Apex Systems, Akkodis, Experis, Randstad, and TEKsystems
- **Major Contenders:** Addison Group, American CyberSystems (ACS Solutions), Artech, Beacon Hill Staffing, Collabera, DISYS, Hays, Insight Global, Kelly Technology, Kforce, Lorien, Motion Recruitment, RGP, Robert Half, Spectraforce, Swoon, and Yoh
- **Aspirants:** Elwood Staffing, Nesco Resource, Rose International, TalentBurst, and Volt Workforce Solutions

US Engineering Contingent Staffing Services PEAK Matrix® 2022

Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix®, the 19 established contingent staffing service providers evaluated are segmented into three categories (in alphabetical order within each category):

- **Leaders:** Actalent, Akkodis, and Kelly Engineering
- **Major Contenders:** American CyberSystems (ACS Solutions), Artech, Hays, Insight Global, Manpower, Nesco Resource, Randstad, Spectraforce, System One, Volt Workforce Solutions, and Yoh
- **Aspirants:** Addison Group, Elwood Staffing, RGP, Rose International, and TalentBurst

US Business & Professionals Contingent Staffing Services PEAK Matrix® 2022

Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix®, the 20 established contingent staffing service providers evaluated are segmented into three categories (in alphabetical order within each category):

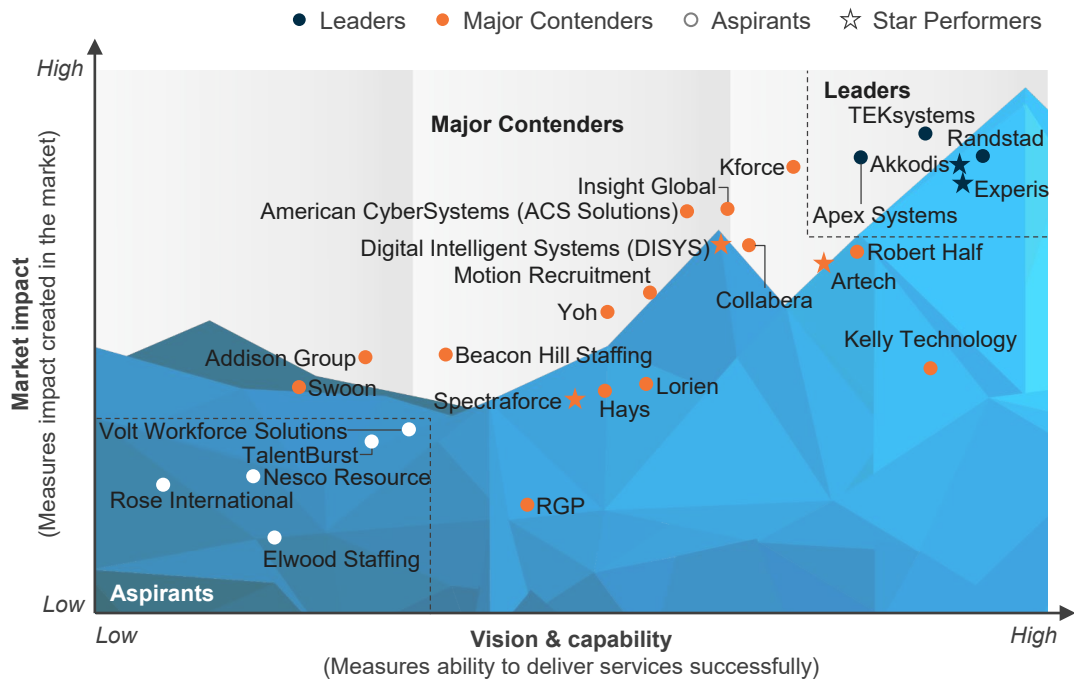
- **Leaders:** Adecco/LHH, Aston Carter, Kelly, Randstad, and Robert Half
- **Major Contenders:** Addison Group, Artech, Beacon Hill Staffing, DISYS, Insight Global, Integrity Staffing, Kforce, Manpower, RGP, Spectraforce, Volt Workforce Solutions
- **Aspirants:** Elwood Staffing, Nesco Resource, Rose International, and Swoon

Contingent Staffing service provider capability overview

- Everest Group delineates each of the 33 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 8 distinct chapters providing a deep dive into key aspects of Contingent Staffing market; below are three charts to illustrate the depth of the report

US IT Contingent Staffing Services PEAK Matrix® Assessment 2022^{1,2,3}



- 1 This assessment is based on Everest Group's estimates that leverage its proprietary Transaction Intelligence (TI) database, service providers' public disclosures, and interaction with buyers as well as inputs from providers including Akkodis, Artech, Experis, Hays, Kelly Technology, Lorien, Motion Recruitment, Randstad, Spectraforce, Swoon, TalentBurst, and Yoh
- 2 ACS Solutions and Volt Workforce Solutions were evaluated as separate entities as the merger was announced post assessment period
- 3 Randstad, Spherion, Cella, Celerity, and Tatum participated jointly and were evaluated as a single entity on the PEAK Matrix®

Source: Everest Group (2022)

Capability assessment

Illustrative example

Measure of capability: 🔄 Low ● High

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

Everest Group's remarks on 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

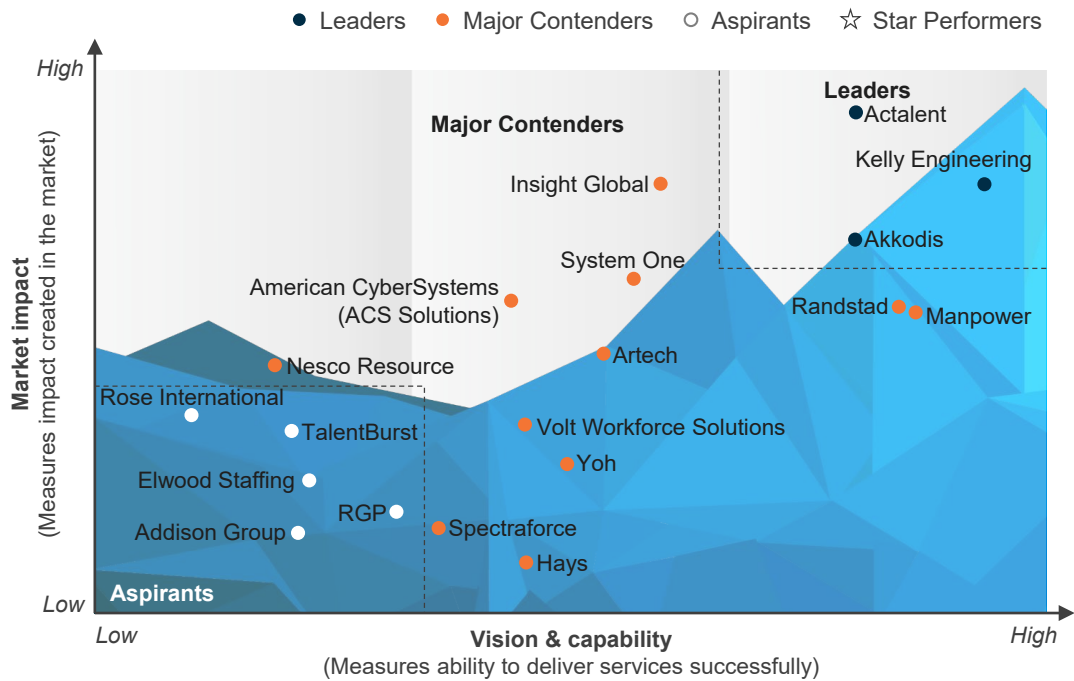
- Provider is a US-based provider of consulting, staffing, and workforce solutions with a specialization in the IT domain. Over the years, it has made considerable investments to expand its industry reach and capabilities in domains beyond IT
- It has a diverse client portfolio with significant representation from financial services, consumer and industrials, healthcare, technology, media & telecom, and business & government services

Limitations

- Its technology stack is still developing. Mature clients looking for technology-driven contingent staffing services may need to evaluate its capabilities carefully
- While it does provide training services around soft skills, it still has to develop its capabilities in providing training services for hard skills

This study offers 8 distinct chapters providing a deep dive into key aspects of Contingent Staffing market; below are three charts to illustrate the depth of the report

US Engineering Contingent Staffing Services PEAK Matrix® Assessment 2022^{1,2,3}



- 1 This assessment is based on Everest Group's estimates that leverage its proprietary Transaction Intelligence (TI) database, service providers' public disclosures, and interaction with buyers as well as inputs from providers including Akkodis, Artech, Hays, Kelly Engineering, Manpower, Randstad, Spectraforce, TalentBurst, and Yoh
- 2 ACS Solutions and Volt Workforce Solutions were evaluated as separate entities as the merger was announced post assessment period
- 3 Randstad, Spherion, Cella, Celerity, and Tatum participated jointly and were evaluated as a single entity on the PEAK Matrix®

Source: Everest Group (2022)

Capability assessment

Illustrative example

Measure of capability: 🔄 Low ● High

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

Everest Group's remarks on 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

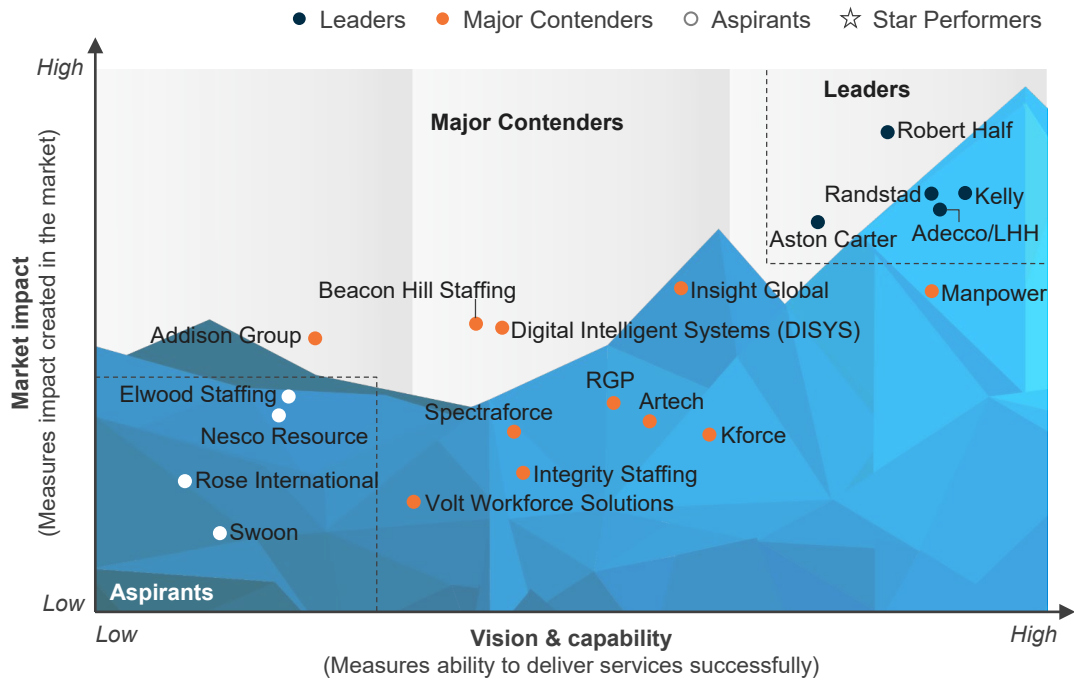
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Illustrative example

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Provider 2	🔄	🔄	●	🔄	🔄	🔄	●	🔄	🔄
Provider 3	🔄	●	●	●	●	🔄	🔄	🔄	●
Provider 4	🔄	🔄	●	●	●	🔄	●	🔄	●
Provider 5	●	●	●	●	●	●	🔄	🔄	●
Provider 6	●	🔄	●	●	●	🔄	●	●	●
Provider 7	●	🔄	●	●	●	🔄	●	●	●
Provider 8	●	🔄	●	●	🔄	🔄	🔄	●	●
Provider 9	🔄	●	●	●	●	🔄	●	●	●

Everest Group's remarks on 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

- Provider is a US-based provider of consulting, staffing, and workforce solutions with a specialization in the IT domain. Over the years, it has made considerable investments to expand its industry reach and capabilities in domains beyond IT
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Research calendar

Contingent Staffing

Published Planned Current release

Reports title	Release date
Disruption in IT Staffing	May 2021
US Contingent Workforce (Staffing) Provider PEAK Matrix® Assessment 2021 – Going Beyond Scale	June 2021
US IT Contingent Workforce (Staffing) Provider PEAK Matrix® Assessment 2021 – Going Beyond Scale	September 2021
Contingent Workforce (Staffing) State of the Market Report 2022: Disrupt or Get Disrupted	November 2021
Positioning for Success: Pivot toward Managed Services Engagements	July 2022
US Contingent Staffing Services PEAK Matrix® Assessment 2022	July 2022
UK Contingent Staffing Services PEAK Matrix® Assessment 2022	Q3 2022
Contingent Staffing Services State of the Market report 2022	Q3 2022

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