Staffing Software Spotlight: Exploring the Predominant Staffing Applicant Tracking Software (ATS) Providers

July 2024: Complimentary Abstract / Table of Contents

Market Report
Contingent Staffing

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Background of the research

Applicant Tracking Systems (ATS) have been an integral part of the contingent staffing industry for a long time, serving as a centralized system of record.

As the staffing technology landscape evolved, staffing ATS providers introduced innovative features to enhance the staffing workflow. Over time, ATS platforms have become more interconnected with other platforms in the staffing technology space, including CRMs, payroll software, VMSs, HRISs, and more.

Today, staffing ATSs are a must-have technology platform and a core pillar for the contingent staffing industry. Providers are continuously evolving their ATS offerings to establish distinct advantages in the highly competitive staffing ATS market.

The report discusses the role of staffing ATS as a key enabler for staffing providers and some key trends in the staffing ATS market. We also focus on the key features and functionalities of a native staffing ATS platform. Additionally, we only look at ATSs serving contingent staffing providers and not from the perspective of enterprises. The research will benefit both large staffing providers, for whom ATSs have long been indispensable, and smaller, emerging firms navigating the process of adopting or selecting an ATS partner.

In this report, we particularly focus on :

- Staffing ATS market overview
- Key differentiating factors for a staffing ATS
- Predominant staffing ATS provider profiles

Scope of this report

Geography: Global

Industry: Staffing Applicant Tracking Systems (ATS)

Services: Contingent Staffing

Use cases: A mix of provider information and publicly available information for 12 leading staffing ATS providers have been used for the analysis in this report.

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Overview and abbreviated summary of key messages

Overview

This report examines the global staffing ATS market landscape, highlights key differentiating factors for staffing ATS, and provides detailed profiles of predominant providers in the market

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

Staffing ATS market overview

- Global staffing ATS market is valued at US$510 million in 2023 and is expected to grow at a CAGR of 4-7% over 2023 to 2028. Key adoption drivers include need for efficiency and scalability, need for better stakeholder experience, and increasing regulatory complexity
- Staffing ATSs see maximum adoption in North America followed by the UK and Europe; APAC is the fastest-growing region for adoption. Staffing ATS market is generally fragmented, characterized by the presence of a few large providers, such as Bullhorn, Avionté, and Ceipal, and many smaller ones

Key differentiating factors for a staffing ATS

A staffing ATS differentiates itself through standout factors such as the extent of integrations and partnerships, customization capabilities, analytics and reporting features, generative AI utilization, and the user interface/experience for stakeholders beyond recruiters

Predominant staffing ATS provider profiles

- Some of the top staffing ATS providers globally include Akkencloud, Avionté, Bullhorn, Ceipal, JobAdder, JobDiva, Manatal, PCRecruiter, RecruitCRM, TalentRecruit, Vincere, and Zoho Recruit
- While all these providers offer native staffing ATS functionalities across the value chain, they may differ in geographic distribution of clients, pricing, key integrations, and more. Each provider has standout functionalities that set them apart

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

Staffing ATS adoption by region

Level of adoption of staffing ATS in a particular region: Low ○○○○○ High

North America, UK and Europe

North America, the UK, and Europe were early adopters of staffing ATS due to their technological advances and competitive job markets. North America, being a significantly more mature market for HR and talent technologies, holds a majority share of staffing ATS market. The UK and Europe markets come next in line

APAC

The APAC market has been slower to adopt staffing ATS compared to North America and Europe but is expected to grow more rapidly than other regions. Recruiters in APAC grapple with a unique challenge due to the region's high population density, leading to a surge in job applications. Countries such as Singapore, India, Sri Lanka, Malaysia, and Hong Kong are recognizing the benefits of ATS adoption to streamline recruitment processes

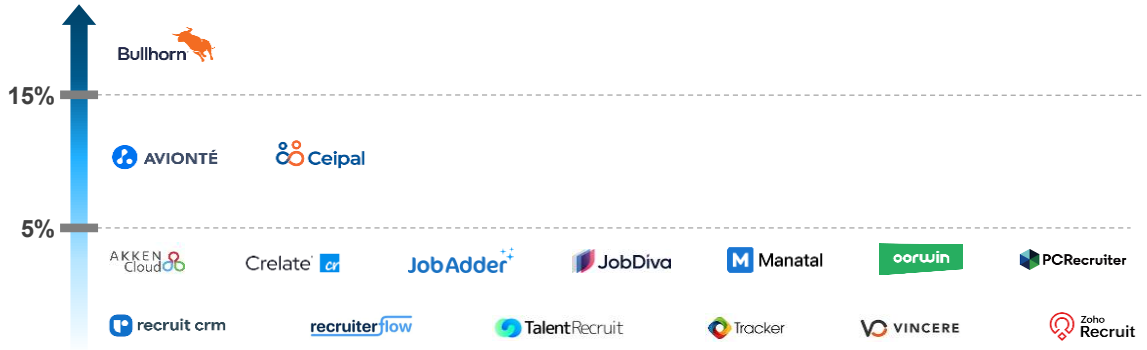
LATAM

LATAM has a nascent ATS market, and the adoption rate is currently lower than in other regions. As the region's technology infrastructure improves, we can anticipate gradual growth in staffing ATS adoption

Global market share of major staffing ATS providers

2023; percentage of revenue

[NOT EXHAUSTIVE]



Key commercial and delivery models of staffing ATS

Current prevalence: Low ○○○○○ High

Key commercial models

Fixed price

Staffing firms pay a predetermined price or a flat fee for access to the ATS platform. It provides predictability in costs but may not be flexible if requirements change.

Input-/User-/T&M-based

Staffing firms pay based on input factors such as the number of users using the ATS or the Time and Materials (T&M) spent, (e.g., duration of ATS usage).

Transaction-based

Staffing firms pay based on their transaction volume within the ATS platform, (e.g., pay per job posting, per candidate profile, per resume search, or per client interaction).

Outcome-based

Pricing of the ATS is tied to specific outcomes or results achieved by the staffing firm, such as successful placements or time-to-fill metrics, (e.g., the number of hires made or the quality of candidates sourced).

Key delivery models

On-premise

The staffing ATS is installed and hosted on the staffing provider company's servers, providing full control and customization.

Cloud (public, private, and hybrid)

The staffing ATS is hosted on external servers accessible via the internet, with options for public, private, and hybrid cloud infrastructures.

Integrations and partnerships as a differentiating factor for a staffing ATS

[NOT EXHAUSTIVE]

Given the plethora of technology solutions available in the staffing ecosystem, a staffing ATS differentiates itself through its ability to seamlessly integrate with diverse sets of integrations. Top ATS providers typically feature an open API for seamless integration with other platforms, alongside a robust marketplace ecosystem comprising trusted partners with seamless integration capabilities.

Below are point solutions/platforms that are typically seen as part of the ATS integration ecosystem:

	Standard integrations		Add-on integrations	
Job distribution	Job boards	Staffing provider website	Recruitment marketing tools	Cloud storage tools
Screening and matching	Parsing and semantic tools		Matching tools	
Scheduling and stakeholder communication	Email integration		Scheduling tools	
Assessment and interviewing	Skill testing and psychometric evaluation platforms		Video interviewing tools	
Onboarding and background verification	Background check tools		E-signature tools	
Additional platforms	CRM	VMS	Payroll software	HRIS	Candidate application

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Research calendar

Contingent Staffing

Published Current release Planned

Reports title	Release date
Contingent Talent and Strategic Solutions State of the Market 2023 – Elevating Efficiency and Experience to Navigate Uncertain Times	December 2023
Internal Talent Mobility	January 2024
Avionté Acquires SimpleVMS: Forging an End-to-End Integrated Platform for Contingent Talent Acquisition and Management	January 2024
Talent Demand Trends | India IT Services – H2 2023	February 2024
Steering into the Wind: Future-proofing Your Talent Strategy for the BFSI Industry	March 2024
Technology Talent Playbook for IT Service Providers – Key Game Changers to Drive Next-generation IT Talent Readiness	March 2024
Introduction to the Skills Intelligence Technology Landscape	April 2024
The Skills Intelligence Technology Landscape: Focus on Talent Management	April 2024
The Skills Intelligence Technology Landscape: Focus on Talent Acquisition	May 2024
Staffing Software Spotlight: Exploring the Predominant Staffing Software (ATS) Providers	July 2024
US Contingent Talent and Strategic Solutions PEAK Matrix® Assessment 2024 - IT, Engineering, and Business & Professionals	Q3 2024
US Contingent Talent and Strategic Solutions PEAK Matrix® Assessment 2024 - Industrial	Q3 2024
UK Contingent Talent and Strategic Solutions PEAK Matrix® Assessment 2024	Q3 2024
Workforce as a Service: Emergence of Online Staffing Platforms	Q4 2024
Contingent Staffing State of the Market Report 2024	Q4 2024
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