

STAFFING Success

SPECIAL ISSUE | 2021

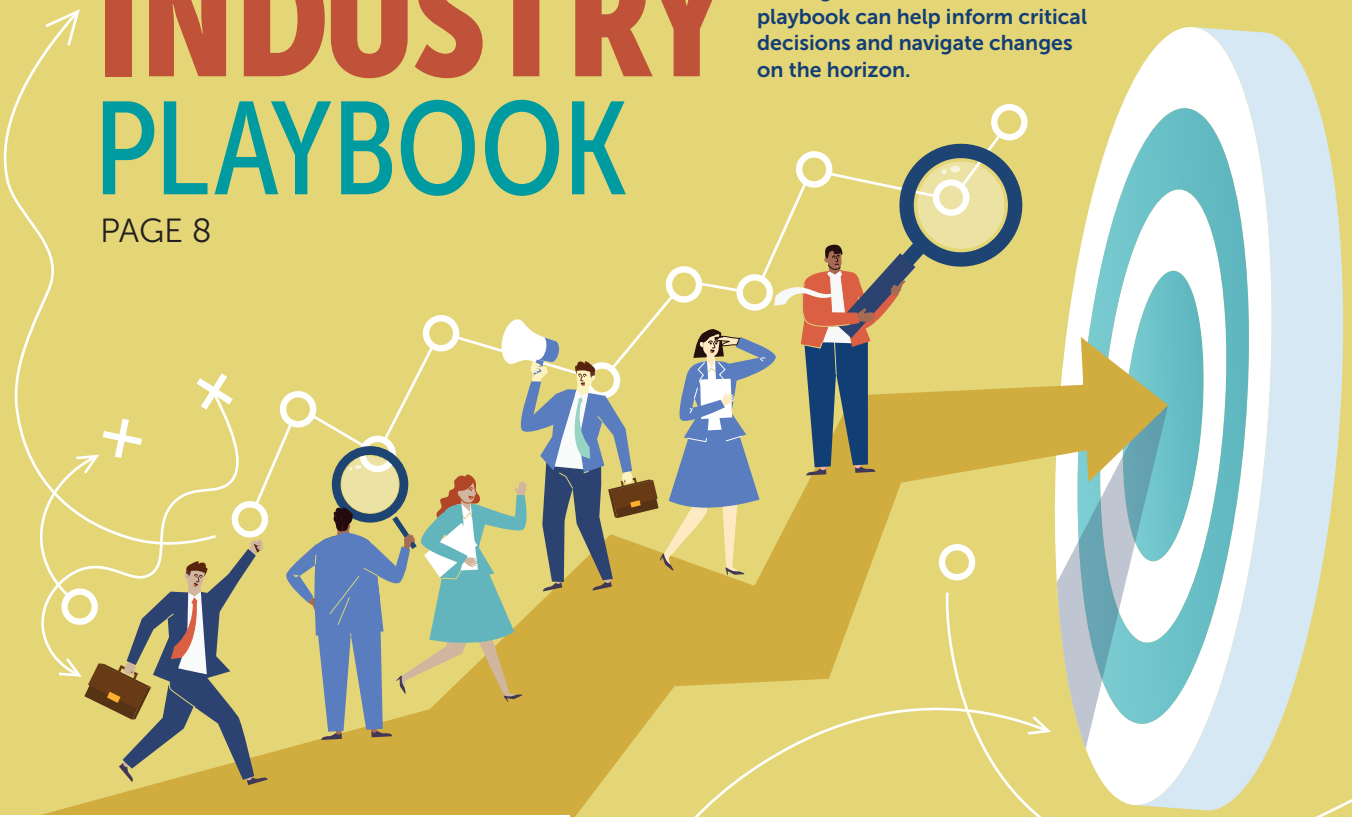
THE MAGAZINE OF THE AMERICAN STAFFING ASSOCIATION

ASA ANNUAL ECONOMIC ANALYSIS **2021**

STAFFING INDUSTRY PLAYBOOK

PAGE 8

The effects of a global pandemic on the workforce and the economy make the data and analysis in this Staffing Industry Playbook even more valuable to company leaders, economists, analysts, and investors than in recent years. As talent slowly returns to the workplace and staffing firms look toward the future, this playbook can help inform critical decisions and navigate changes on the horizon.



MAKE THIS STAFFING INDUSTRY PLAYBOOK WORK FOR YOU

This special issue of *Staffing Success* delivers important economic and industry data you can use to leverage growth opportunities for your company. Write in your take-aways and supplement your strategies with additional online content.



Go to americanstaffing.net/playbook for downloadable graphics and bonus content.

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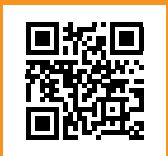
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Did You Know?

ASA members always are welcome to contact the research team at 703-253-2020 or research@americanstaffing.net with questions. You can also tweet your questions to [@StaffingData](https://twitter.com/StaffingData).

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STAFFING Success

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ASA ANNUAL ECONOMIC ANALYSIS 2021

STAFFING INDUSTRY PLAYBOOK

Welcome to your ASA annual economic analysis. This playbook is designed to help staffing and recruiting professionals, analysts, economists, and all those who track the industry understand the U.S. staffing and recruiting industry during the current economic disruption and evaluate where it's headed. There are dedicated spaces throughout this playbook for your own notes as well as a chart index, making it easy to find specific data points.

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Contributors

This 2021 Staffing Industry Playbook is based on surveys and analysis conducted by the ASA research team, which throughout the year manages more than 30 research projects, including the ASA Staffing Index, ASA Staffing Employment & Sales Survey, ASA Workforce Monitor®, and ASA Temporary Help Wage Tool. Learn more at americanstaffing.net/research.

Senior Director, Research Cynthia Davidson
Assistant Director, Research Tim Hulley
Coordinator, Research Chandler Mouw

COLUMN

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ASA President and CEO Richard Wahlquist

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Here's where to find *Staffing Success* advertisers. Go to americanstaffing.net/digital for one-click access to specific products and services.

56 Chart Index

Here is a quick reference tool for finding specific charts and data points in this year's playbook.

Get important industry data real-time and stay ahead of fluctuations and trends—follow the ASA research team on Twitter @StaffingData.



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Senior Director, Publishing and Marketing Marlene L. Hendrickson

Senior Manager, Publishing Stephanie Kern

Senior Editor Jennifer Silber, CAE

Publication Design Fan Works Design LLC

Art Director Dawn Ripple McFadin

ADVERTISING

Director, Supplier Relations Sarah Senges 703-253-2042 ssenges@americanstaffing.net

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DIGITAL EDITION

In addition to this print edition, *Staffing Success* magazine is also available as an interactive digital edition. Visit americanstaffing.net/digital to access this and past issues of the magazine.



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The American Staffing Association is the voice of the U.S. staffing, recruiting, and workforce solutions industry. ASA advances the interests of staffing and recruiting firms of all sizes and across all sectors through legal and legislative advocacy, public relations, education, and the promotion of high standards of legal, ethical, and professional practices. ASA members provide the full range of employment and workforce services and solutions, including temporary and contract staffing, recruiting and permanent placement, outplacement and outsourcing, training, and human resource consulting.

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277 S. Washington St., Suite 200, Alexandria, VA 22314-3675 703-253-2020

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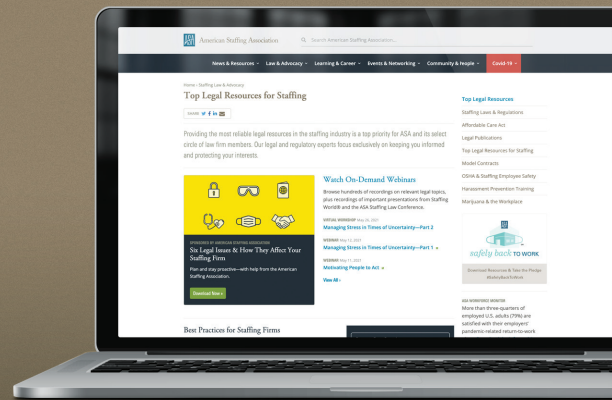


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source: McKinsey

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SHAPING A NEW AND BETTER WORLD OF WORK



By Richard Wahlquist,
President and CEO

The worldwide spread of Covid-19 in early 2020 resulted in a global pandemic that has profoundly affected virtually every aspect of the way we live and work. The data and analysis in this Staffing Industry Playbook can help us frame the future and identify opportunities.

As challenging as it has been to “bend the Covid curve” over the past year and a half, what no one could have foreseen in March 2020 was the attendant breadth and the scope of the pandemic and its impact on global labor markets and workers’ attitudes.

As of October, the nation had recovered about 80% of the jobs lost at the depth of the recession in 2020. But there are still more than four million fewer jobs than there were before the pandemic, and there are millions of working age Americans on the sidelines, some of whom may never be part of the workforce.

It’s that last metric that has economists really concerned. At the current pace of jobs gains, economists are projecting that it could take years for the U.S. to get back to the prepandemic employment levels.

LEVERAGING VALUABLE INTEL

The data, analysis, and take-aways in this annual Staffing Industry Playbook clearly detail the impact of the pandemic on labor supply, labor force participation, and the economy. Most important, the data quantifies the ongoing impact on the staffing industry and identifies trendlines and new opportunities arising from what is truly one of the most significant strategic inflection points shaping the world of work today and, likely, forever.

For many sectors, however, the challenges run far deeper than attracting workers back from the sidelines. What has been called the Great Discontent, the Great Disengage, and the Great Resignation is manifesting itself in people not wanting to go back to their “old normal” when it comes to work and career.

U.S. Bureau of Labor Statistics data show that U.S. employees left their jobs nearly 20 million times between April and August this year. **Amid a vibrant economic recovery, employee resignations are trending 60% higher than the same period last year and 12% above the spring and summer of 2019, when we saw the most robust employment market in almost 50 years.**

The overall impact on labor market supply is even more dire. The BLS data on resignations does not include the loss of millions of Baby Boomers who moved up their retirement dates and who are not currently planning to return to the workforce.

MOVING FORWARD

The world of work is pivoting, and many believe that labor market shortfalls in several key sectors could be the new norm for years to come. And while technology, automation, machine learning, and artificial intelligence have become increasingly important tools to enhance productivity and trim head count, the premium on human capital as a driver of growth, productivity, innovation, and service delivery has never been higher.

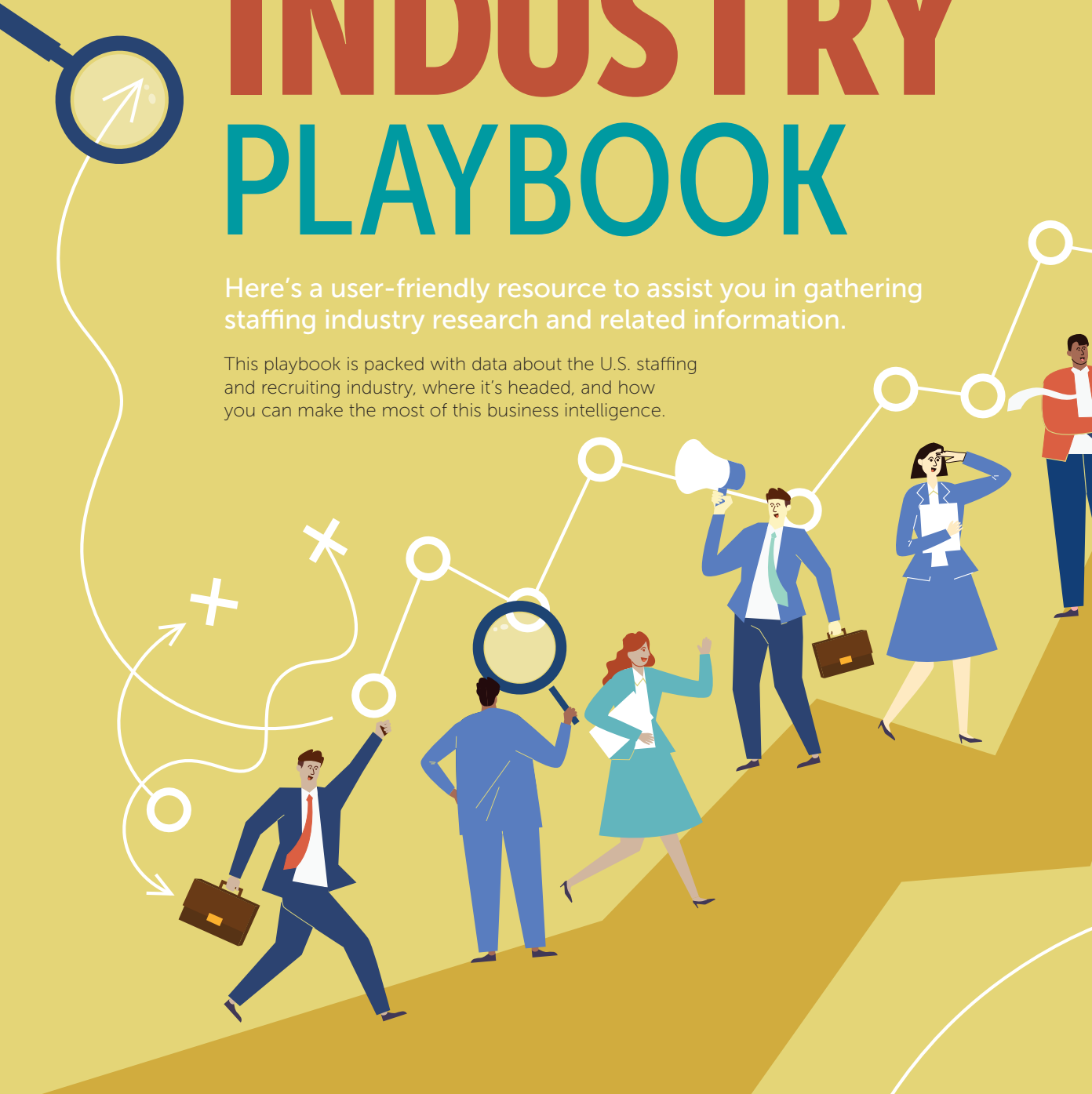
Workforce engagement, workforce development, and workforce flexibility are the pillars upon which successful businesses will compete and differentiate. These pillars also form the core of the industry’s playbook and its future.

ASA and its members are committed to nurturing that core and updating playbook strategies in ways that benefit individuals, organizations, and societies. The intersection of opportunity, capacity, and responsibility will position staffing industry leaders and their companies to help shape a new and better world of work. ■

STAFFING INDUSTRY PLAYBOOK

Here's a user-friendly resource to assist you in gathering staffing industry research and related information.

This playbook is packed with data about the U.S. staffing and recruiting industry, where it's headed, and how you can make the most of this business intelligence.



SAVVY STAFFING PROFESSIONALS, economists, analysts, investors, business development strategists, and other followers of the industry are in a constant state of reconnaissance—perhaps more now than ever before. They can use this playbook as part of their information-gathering and analysis activities to become more agile during these pandemic times in their business decisions, to keep

ahead of employment trends, and to allow them to capitalize on areas of opportunity.

Historical business cycles and patterns have been disrupted by the unprecedented Covid-19 recession precipitated by the pandemic. The U.S. is now in the beginning stages of a unique expansion, which ended the shortest—yet one of the most severe—recessions on record.

The economy has begun picking up the pieces left by the Covid-19 recession, with gross domestic product surging and the unemployment rate retreating. Oddly, the recovery from the pandemic employment crisis has not brought workforce participation levels back up as quickly as many anticipated, as a significant number of workers have been deciding to remain on the sidelines.

Amid these unparalleled circumstances, staffing employment rebounded relatively quickly, and demand for staffing services is strong.

Forecasting is an even more precarious business in this everchanging pandemic reality, but the general consensus is that the economy will continue to expand—although the landscape will be a bit different.

Further explore these trends and more in this overview of the size, scope, and dynamics of the U.S. staffing and recruiting industry. Each section of this playbook includes a brief analysis of trends and key take-aways.

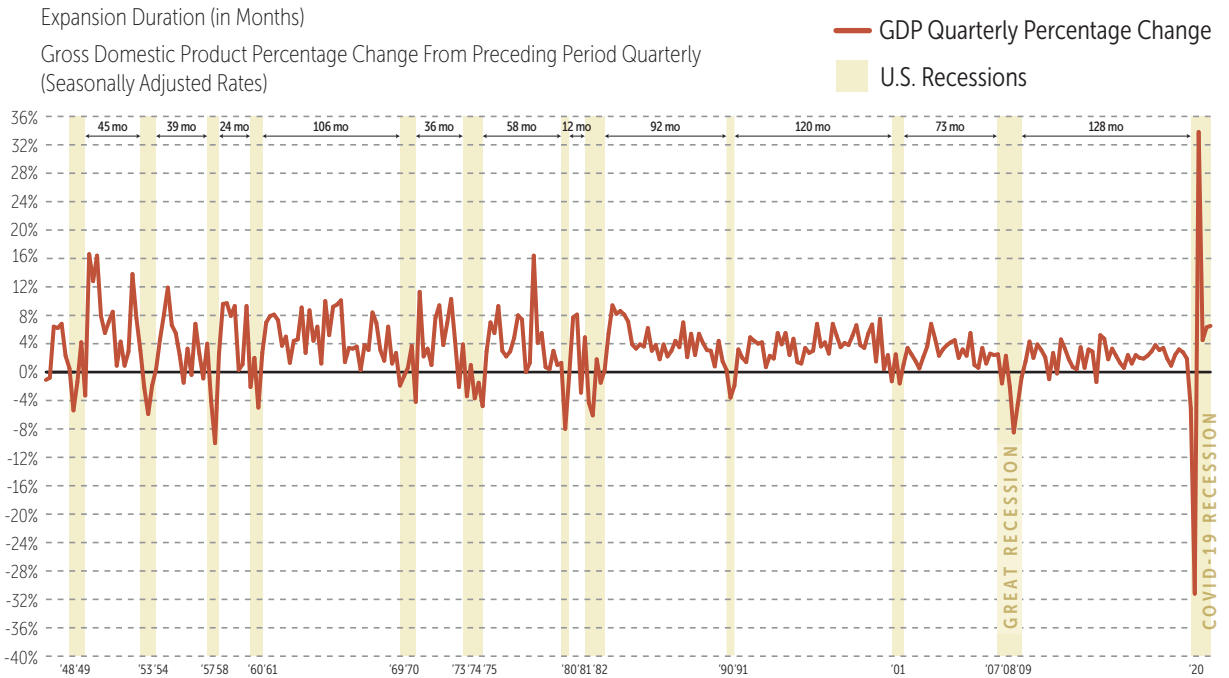
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ECONOMIC EXPANSION

THE TWO-MONTH COVID-19 RECESSION ENDS HISTORICALLY LONG EXPANSION



Source: National Bureau of Economic Research, U.S. Bureau of Economic Analysis

TRENDS:

Spanning 18 months from late 2007 to mid-2009, the Great Recession was the longest recession since World War II. It was considerably longer than the average of about 10 and a half months for the 10 prior post-war recessions. Many economists expected a rapid and robust recovery from the Great Recession, like that of 1957 when real GDP declined over eight months and fully recovered in four. Instead, recovery from the Great Recession was slow and weak. Real GDP did not return to prerecession levels until 2013, three and a half years after the recession ended. In February 2020, the Covid-19 pandemic plunged the nation into a new economic crisis, ending the post-Great Recession expansion at 128 months—the longest in recorded history. The Covid-19 recession officially ended in April 2020, with a swift expansion beginning in May 2020.

TAKE-AWAYS:

The pandemic-induced recession was quite severe, causing great damage to the economy. However, it also proved to be short-lived at just two months, and a new period of expansion is well underway. Many aspects of the economy have yet to return to their prepandemic level, but there is upside as many Covid-19 effects appear to be fading and a new normal is becoming a way of life and doing business.

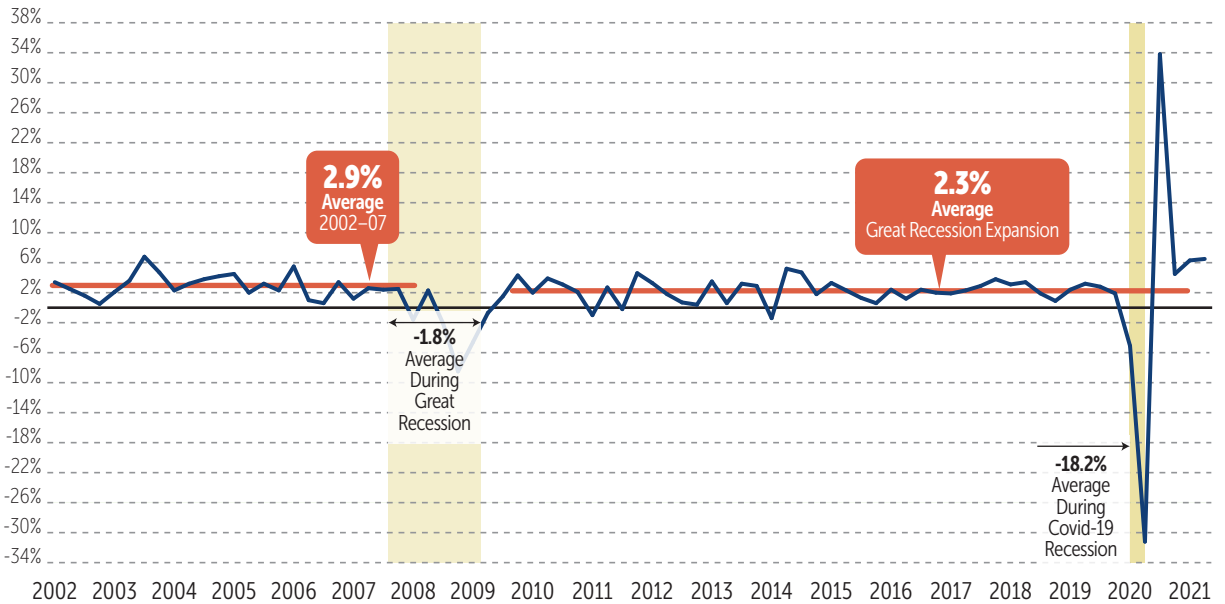
NOTES:

GROSS DOMESTIC PRODUCT

GDP GROWTH SURGES BRIEFLY FOLLOWING HISTORIC CORONAVIRUS RECESSION LOW

Gross Domestic Product Percentage Change From Preceding Period Quarterly (Seasonally Adjusted Annual Rates)

— GDP Quarterly Percent Change
 ■ Great Recession ■ Covid-19 Crisis



Source: U.S. Bureau of Economic Analysis

TRENDS:

During the Great Recession, average quarterly gross domestic product dropped 1.8%. Recovery from the recession was slow and weak. During that expansion from July 2009 to February 2020 (just before the Covid-19 financial crisis was declared), quarterly GDP grew at an average annualized rate of 2.3%, well below the 2.9% rate of the 2002–07 expansion and significantly lower than the overall average annual rate of 3.3% since 1930, when the U.S. Department of Commerce first began tracking GDP. The pace of GDP growth surged 33.8% during the third quarter of 2020—the greatest increase ever recorded, following the historic low caused by the Great Shutdown of 2020—and grew more than 6% in the first two quarters of 2021.

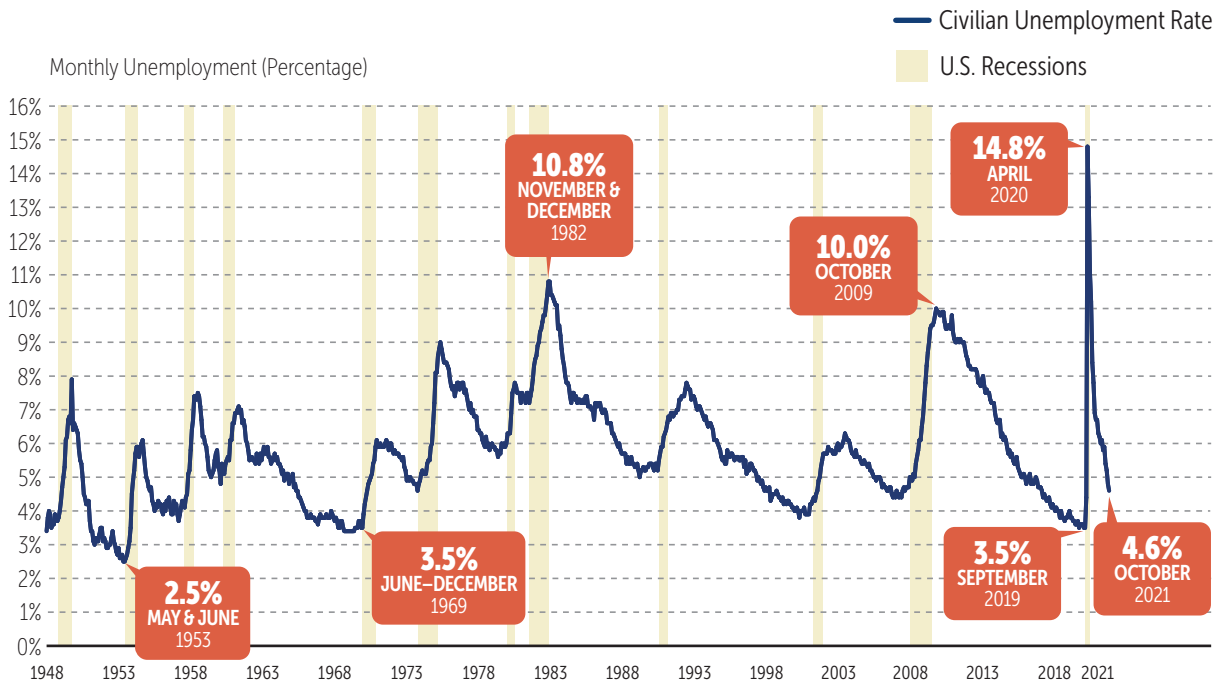
TAKE-AWAYS:

Historically, gross domestic product and staffing employment have been coincident economic indicators. In other words, staffing employment rises and falls along with the overall economy as measured by quarterly changes in GDP. Because government estimates for GDP are released months after the fact and subject to frequent revision, staffing employment can be used as a reliable, near real-time indicator of the health of the economy. Follow the ASA Staffing Index (see page 20) to track staffing employment and economic trends during the current financial recovery.

NOTES:

UNEMPLOYMENT RATE

UNEMPLOYMENT IMPROVES AFTER RECORD SPIKE DURING THE COVID-19 RECESSION



TRENDS:

After reaching a 26-year high of 10.0% during the Great Recession, the unemployment rate began a downward trend and hit a low not seen in 50 years in September 2019. The Great Shutdown spurred a historic spike in unemployment, to 14.8% in April 2020. The unemployment rate then fell to 4.6% in October 2021—a dramatic improvement, but still above the average of 3.7% seen in 2019.

TAKE-AWAYS:

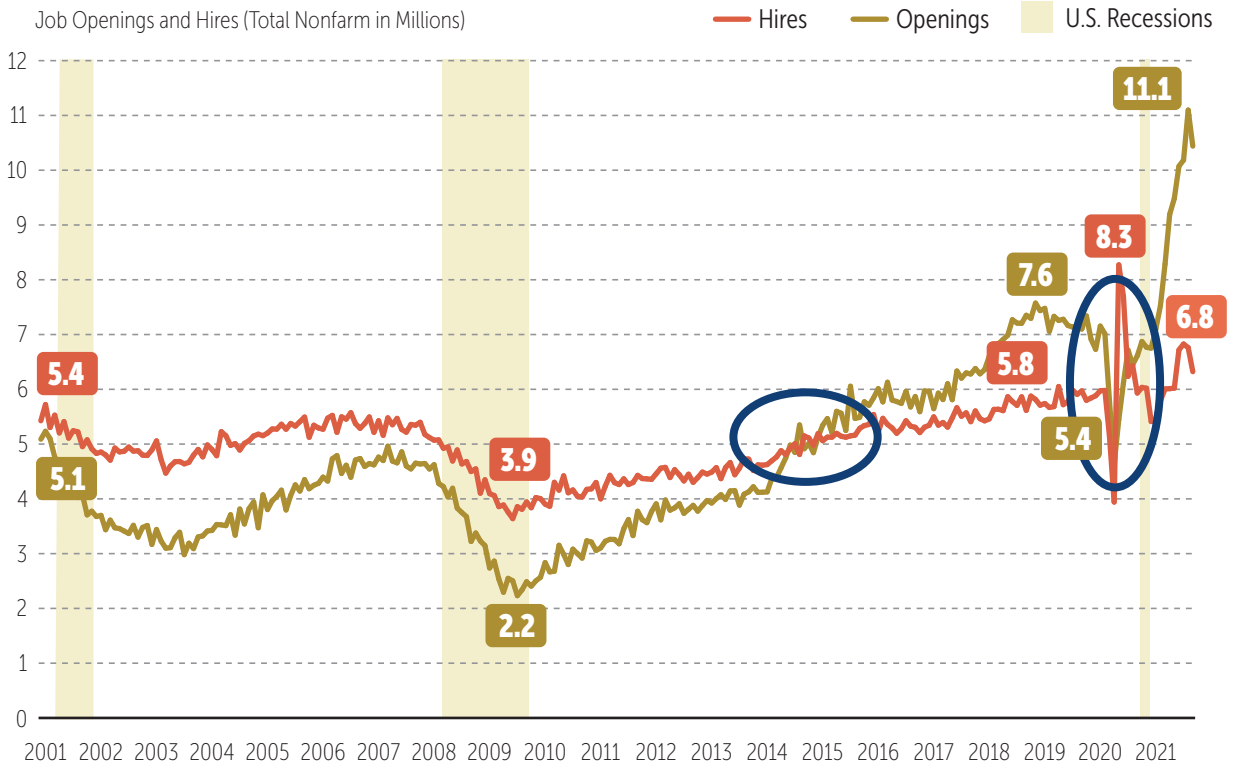
The unemployment rate has improved from the spike in 2020, but it still has not recovered to prepandemic levels. In a labor market already complicated by pandemic fears, child care challenges, and extraordinary government stimulus payments, additional considerations may be required to entice candidates off the sidelines.

Staffing services remain in demand as businesses search for hard-to-find talent and job seekers look for opportunities in the new world of work.

NOTES:

JOB OPENINGS AND HIRES

JOB OPENINGS EXCEED HIRES ONCE AGAIN AMID COVID-19 RECESSION RECOVERY



Source: U.S. Bureau of Labor Statistics

TRENDS:

Historically, the number of job openings and hires have moved in the same direction, with hires outpacing openings. Divergence from this trend began in 2014 as the two measures stopped moving in tandem and the number of job openings started to exceed the number of hires. The Covid-19 pandemic reversed the trend briefly, with a historic 8.3 million hires in May 2020 exceeding a dwindling 5.4 million job openings. However, job openings quickly advanced, outpacing hires once again, reaching an all-time high in July 2021 at 11.1 million—well beyond the corresponding 6.8 million hires.

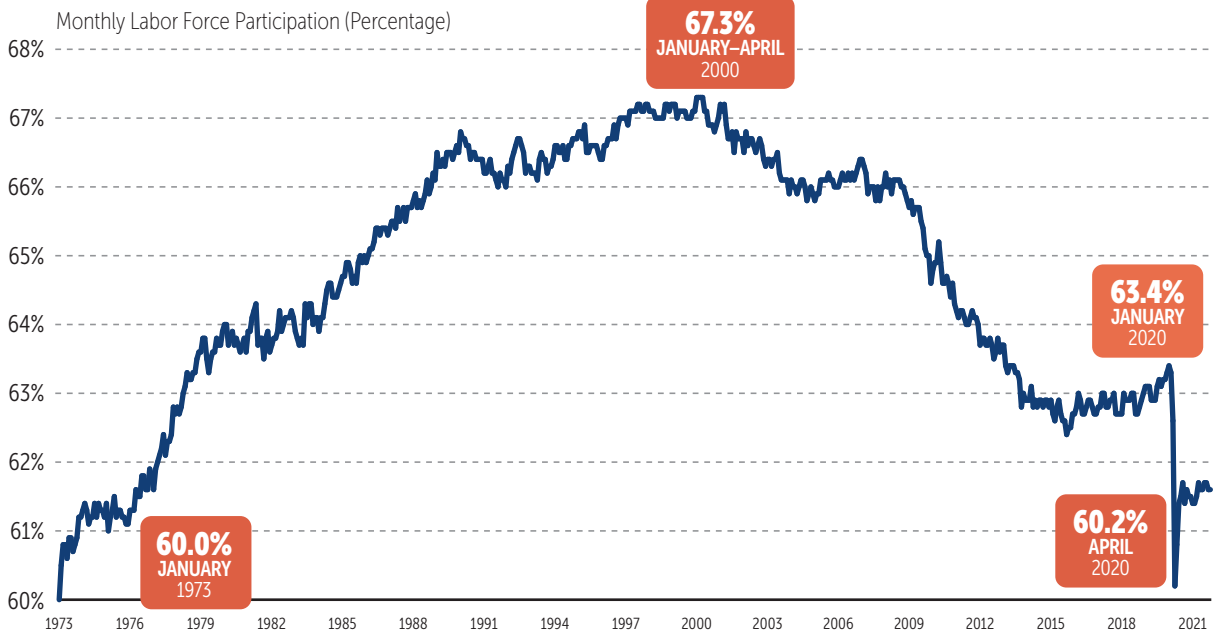
TAKE-AWAYS:

Job openings have been considered a lagging indicator of the economy given that businesses usually wait on assurances of economic well-being before they choose to hire. Hires, on the other hand, have been an indicator of the robustness of the economy and the labor force. The Great Shutdown disrupted economic cycles and employment trends in unique ways. With so many openings for job seekers to choose from, employers should consider auditing their employment practices and policies to attract and retain talent.

NOTES:

LABOR FORCE PARTICIPATION RATE

WORKFORCE PARTICIPATION STILL MUTED



Source: U.S. Bureau of Labor Statistics

TRENDS:

After increasing for more than six decades, the labor force participation rate—the share of the working-age population either employed or seeking a job—peaked at 67.3% from January through April 2000, according to the U.S. Bureau of Labor Statistics. From 2000 to 2020, the participation rate gradually declined; it then plummeted to a near 50-year low of 60.2% in April 2020 as a result of the Covid-19 pandemic-induced shutdown. The participation rate increased slightly to 61.6% in October 2021 but remains below the rate of 63.4% seen just prior to the pandemic in January 2020.

TAKE-AWAYS:

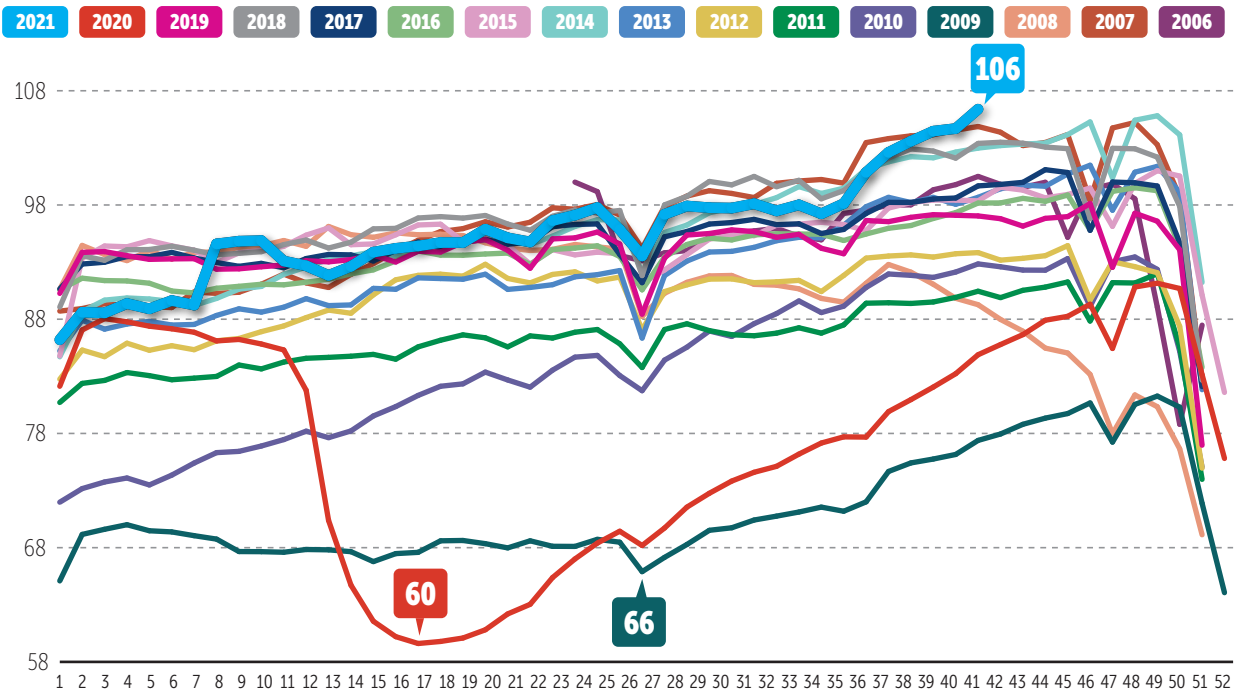
Employment growth is recovering from the Great Shutdown, but economists posit that it will be years before the labor market and participation rate fully recover to even the moderated levels seen in the five years preceding the coronavirus pandemic. Employers, including staffing companies, will need to be open to new possibilities and get creative in how they source and place qualified talent.

NOTES:

ASA STAFFING INDEX

STAFFING EMPLOYMENT RECOVERS TO PREPANDEMIC LEVELS

52 Weeks of ASA Staffing Index: June 2006 (When the Index Was Introduced at 100) Through July 2021



Source: American Staffing Association, Staffing Index

TRENDS:

The weekly ASA Staffing Index tracks trends in temporary and contract employment. The index was set at 100 when it was publicly launched June 12, 2006. It troughed at 66 in midsummer 2009, as the Great Recession ended, and rose to a record high of 106 in December 2014. In April of 2020, the index plunged to a record low of 60 amid the 2020 recession caused by the coronavirus pandemic. The index gradually recovered throughout the rest of 2020, reaching a new record high of 106 in fall 2021.

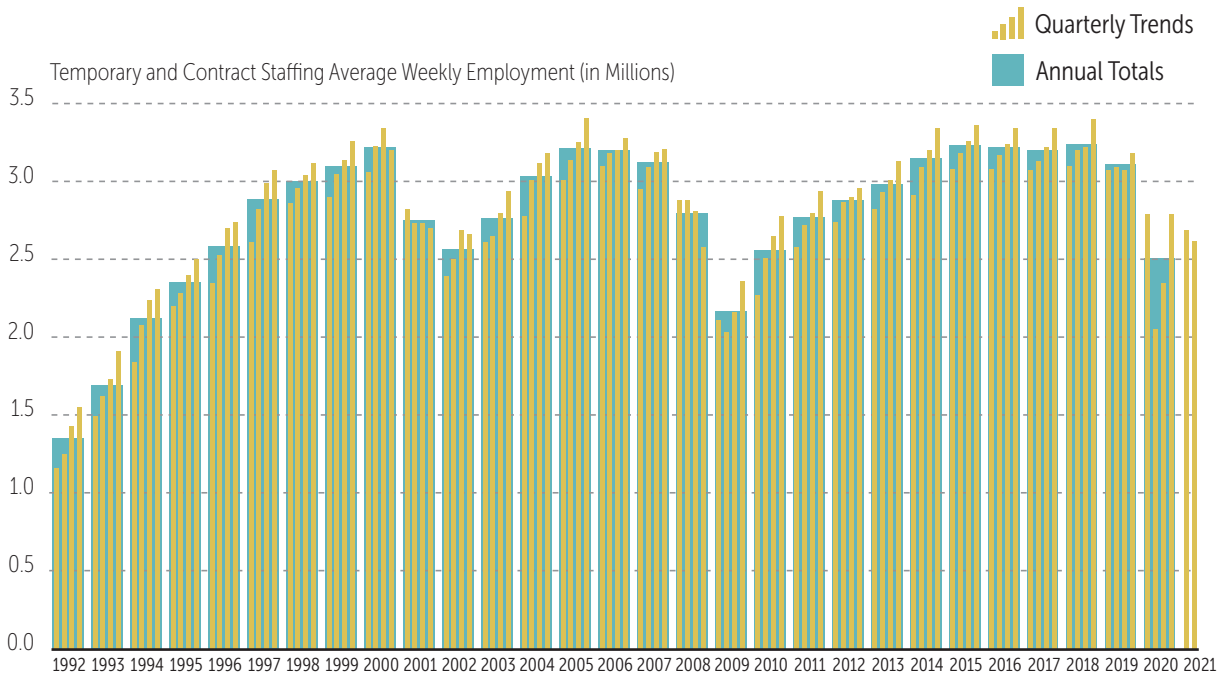
TAKE-AWAYS:

Historically, staffing employment has served as a coincident economic indicator, although government data are reported less frequently and are constantly revised. Because the ASA Staffing Index measures weekly changes in staffing employment, it bears watching as a near real-time indicator of current economic conditions—especially during times of expansion for the labor market and economy. Follow the weekly trends at americanstaffing.net/index.

NOTES:

AVERAGE WEEKLY STAFFING EMPLOYMENT

U.S. STAFFING JOBS REMAIN STIFLED AS PANDEMIC WEARS ON



Source: American Staffing Association, Staffing Employment and Sales Survey

TRENDS:

After the low of 2.16 million temporary and contract employees per week in 2009, it took six years for the staffing industry to fully recover the one million jobs lost during the 18 months of the Great Recession. In 2020, U.S. staffing companies employed an average of 2.50 million temporary and contract workers per week, down 19.4% from 2019 due to the Covid-19 pandemic. During the first quarter of 2021, staffing employment saw a typical seasonal dip of 3.6% from the fourth quarter of 2020. Diverging from a decade-long trend, staffing jobs declined 2.8% from the first quarter to the second quarter of 2021.

TAKE-AWAYS:

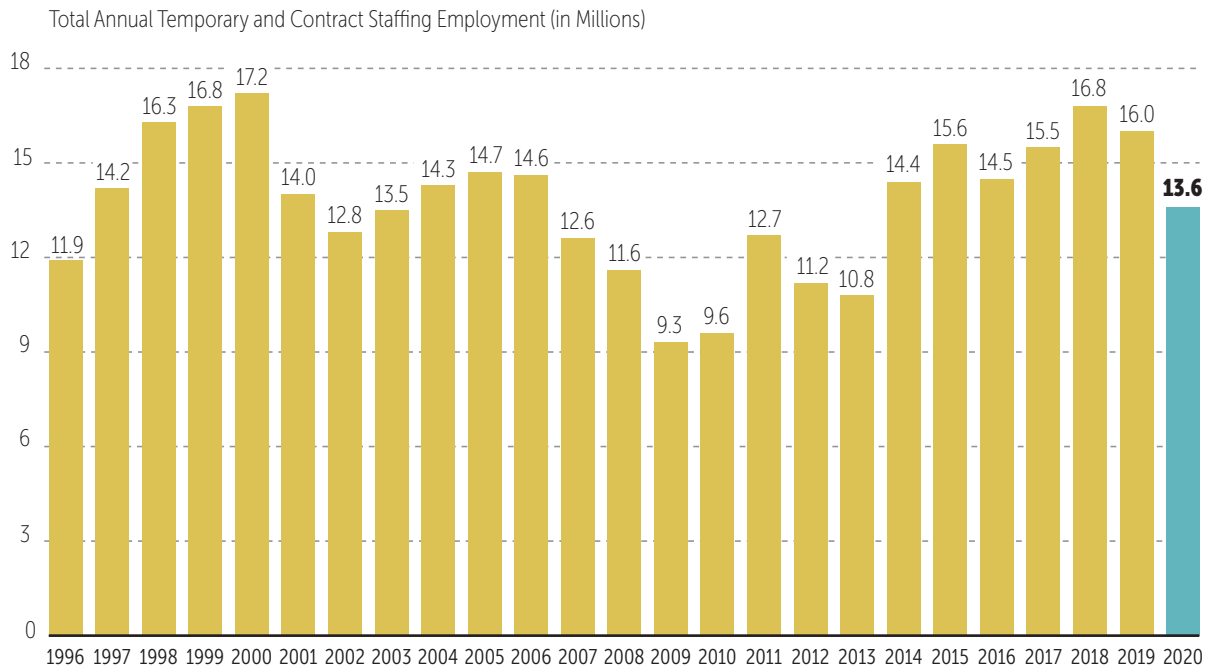
The quarterly survey provides staffing data covering approximately 10,000 establishments, including changes in sales, payroll, and employment, broken down by five broad industry sectors and four sales categories. Use the results of the ASA Staffing Employment and Sales Survey to glean projections and monitor quarterly and annual industry trends, and as benchmarks for temporary and contract staffing statistics as well as search and placement metrics. Learn more at americanstaffing.net/quarterly-survey.

NOTES:



ANNUAL STAFFING EMPLOYMENT

AS EXPECTED, FEWER STAFFING EMPLOYEES HIRED DURING PANDEMIC YEAR



Source: American Staffing Association, Staffing Employment and Sales Survey

TRENDS:

ASA estimates the total number of temporary and contract employees who have worked in the staffing industry for any period of time during the calendar year, using data from the quarterly ASA Staffing Employment and Sales Survey. Over the course of pandemic-stricken 2020, U.S. staffing companies hired a total of 13.6 million temporary and contract employees. This is a 15% deficit from 16.0 million in 2019, the largest percent decrease in over a decade.

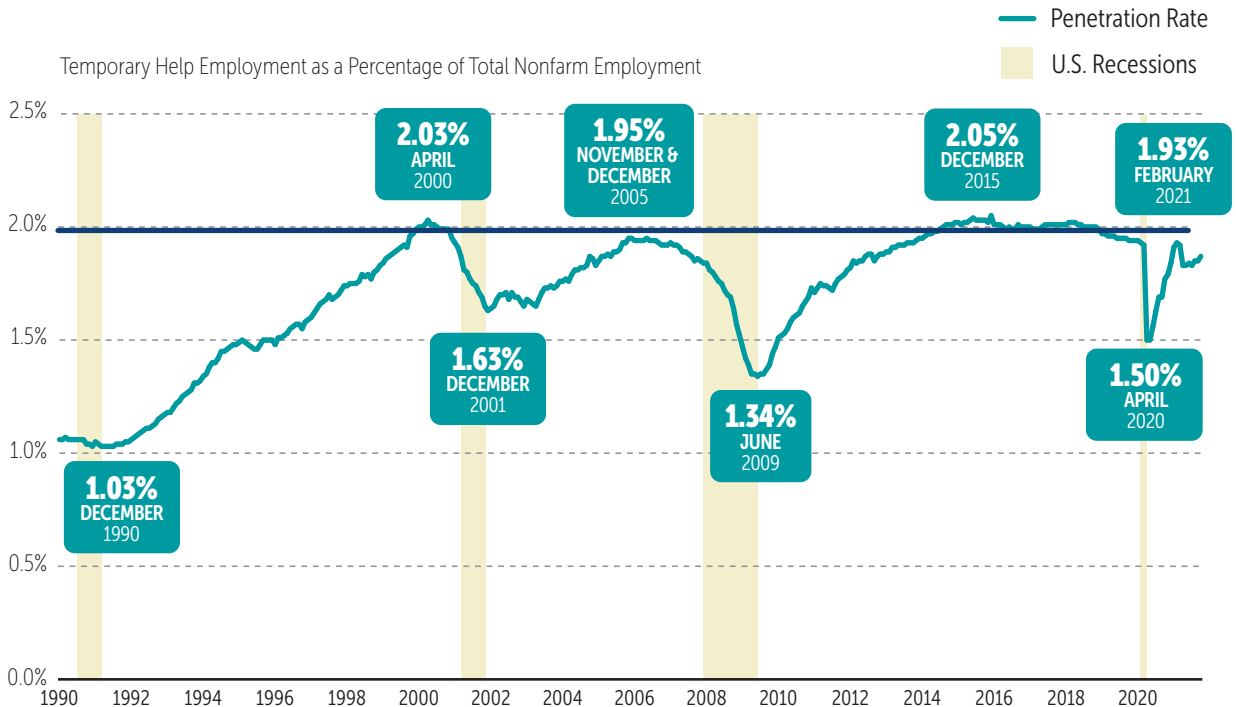
TAKE-AWAYS:

While the full recovery from the Great Shutdown of 2020 is still underway, demand for talent is steady, yet sourcing is tougher than ever. With tight labor markets nationwide, now is the time for staffing companies to re-evaluate their recruiting strategies and ensure they have the systems and processes in place to continue servicing client demand amid a unique new pandemic-induced landscape.

NOTES:

STAFFING PENETRATION RATE

STAFFING PENETRATION RATE REMAINS BELOW 2% DURING PANDEMIC



Source: U.S. Bureau of Labor Statistics

TRENDS:

Until 2015, the staffing industry's longstanding peak penetration rate had been 2.03%, set in April 2000. (The penetration rate measures temporary help services employment as a percentage of the total nonfarm workforce.) The rate plunged to 1.63% during the recession that followed. Though it rebounded to 1.95% in November 2005, it fell again during the Great Recession to a low of 1.34%. Since reaching that low, the staffing penetration rate had been on an upward trend, setting a new record high of 2.05% in December 2015, then leveling at about 2% until diving to 1.50% in April 2020 during the Covid-19 pandemic. Following the pandemic low, the penetration rate peaked at 1.93% in February 2021, before retreating to 1.83% in the spring and then inching up to 1.87% in October 2021.

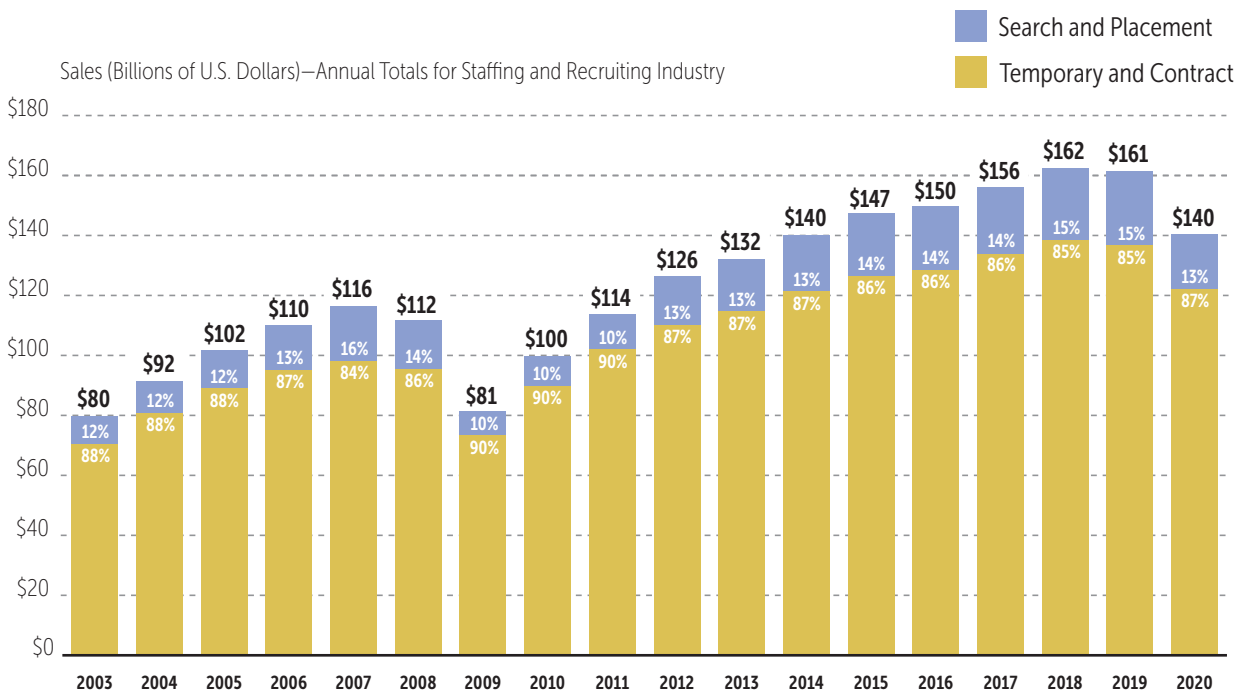
TAKE-AWAYS:

The role the staffing industry plays in the U.S. economy continues to be vital, especially during the economic expansion and employment recovery from the recession of 2020. The Great Shutdown is so unique that economists and industry observers alike are reserved in even speculating as to when the workforce may return to more traditional cycles. Staffing services offer flexibility in worker acquisition during uncertain times. As more employers confront pandemic challenges, including filling essential job openings, staffing companies have increased opportunities to partner with businesses to strategically source and deploy talent.

NOTES:

STAFFING AND RECRUITING INDUSTRY SALES

STAFFING AND RECRUITING SALES FELL 13% TO \$140 BILLION IN 2020



Source: American Staffing Association, Staffing Industry Analysts Inc., U.S. Department of Commerce

TRENDS:

Temporary and contract staffing sales totaled \$122.3 billion in 2020, according to the latest annual data from the ASA Staffing Employment and Sales Survey—a decrease of 10.5% from 2019. Search and placement sales dropped 28.0% in 2020, according to Staffing Industry Analysts, totaling \$17.6 billion in 2020.

Combining temporary and contract staffing with search and placement services, U.S. staffing industry sales totaled \$139.9 billion in 2020, 13.3% less than in 2019.

TAKE-AWAYS:

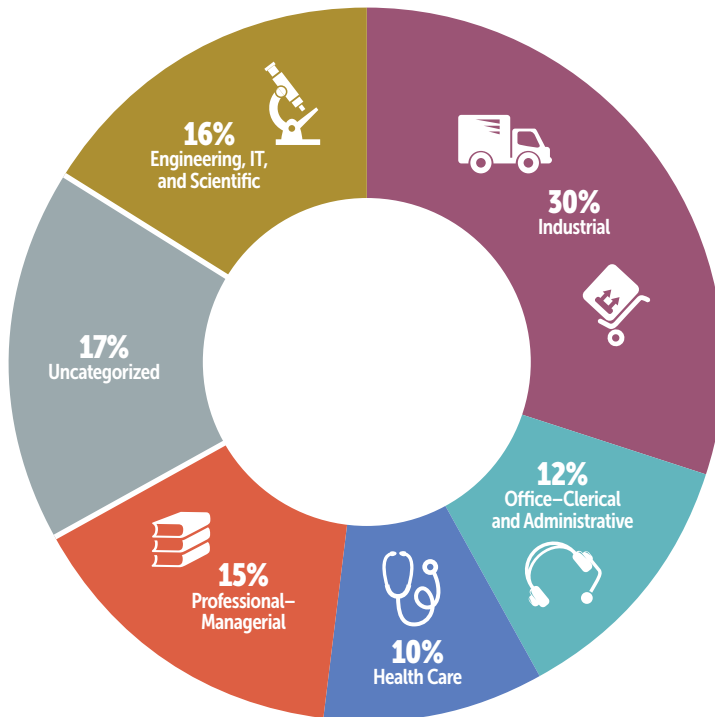
As with the economy overall, the Covid-19 pandemic caused staffing and recruiting industry sales to contract sharply in 2020. While the expanding economy presents staffing companies with an opportunity, stiff competition for talent presents a challenge. For staffing companies to return to prepandemic sales levels, they must adapt to attract candidates in a significantly altered world of work.

NOTES:

STAFFING SALES BY SECTOR

STAFFING COMPANIES SERVE ALL INDUSTRY SECTORS

Annual Sales (Percentage) by Sector—Temporary Help Services



Source: American Staffing Association, U.S. Census Bureau

TRENDS:

In the prepandemic U.S., there were about 25,000 staffing and recruiting companies, which altogether operated around 49,000 offices. Approximately 56% of companies and 75% of offices are in the temporary and contract staffing sector of the industry. ASA relies on periodic benchmarks from the U.S. Census Bureau for its economic surveys and sector-level data.

Three in 10 temporary staffing sales dollars are from the industrial sector (30%), according to the latest census product line data. The remaining sales come from the engineering, information technology, and scientific sector; office-clerical and administrative assignments; health care placements, professional-managerial positions; and other staffing services.

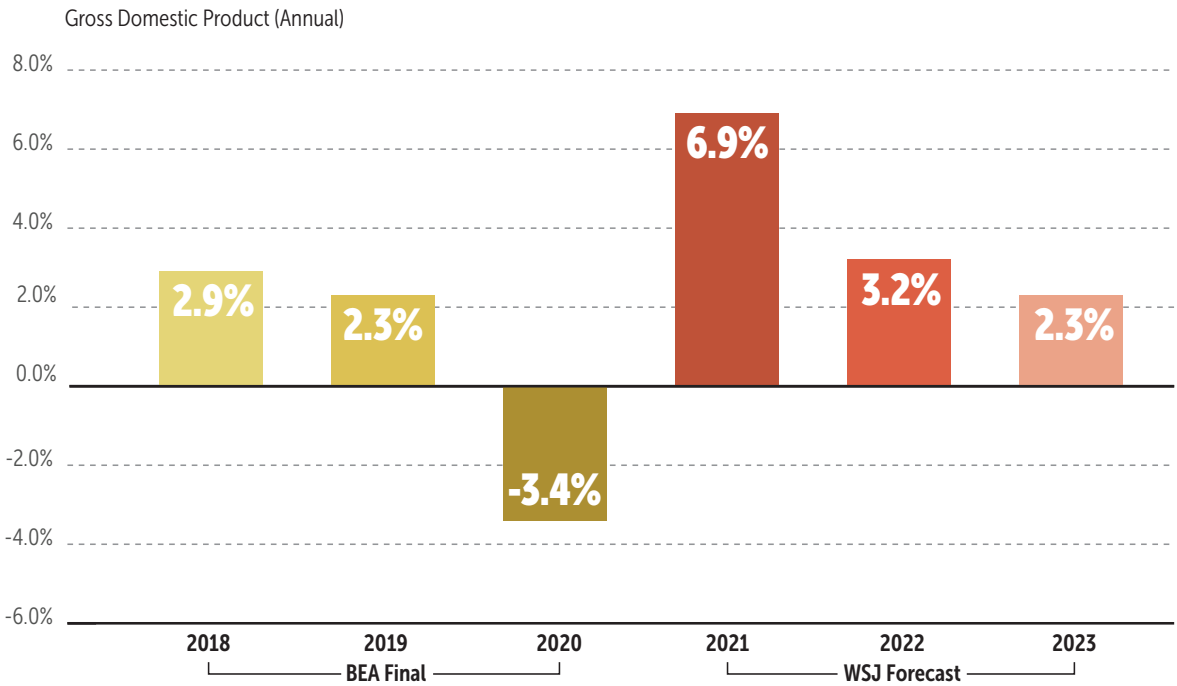
TAKE-AWAYS:

The staffing, recruiting, and workforce solutions industry makes a vital contribution to the U.S. economy while servicing businesses across virtually all industries. Staffing provided job and career opportunities for about 16 million employees per year prepandemic (13.6 million during the pandemic).

NOTES:

FORECASTING ECONOMIC GROWTH

GDP GROWTH EXPECTED TO MODERATE IN COMING YEARS



Source: U.S. Bureau of Economic Analysis, Wall Street Journal Economic Forecasting Survey

TRENDS:

Economic activity has been erratic over the past three years, driven by the Covid-19 pandemic recession. The annual gross domestic product growth rate for 2018 was 2.9%, and it slowed to 2.3% in 2019 before plunging to -3.4% at the end of pandemic-stricken 2020. The recovery from the Crisis of 2020 has economists surveyed by the *Wall Street Journal* much more optimistic about how 2021 will end. Consensus projections for full-year GDP growth in 2021 sit at 6.9%. Economists expect the economic surge to ease and GDP to slow in the coming years, forecasting growth of 3.2% in 2022 and 2.3% in 2023.

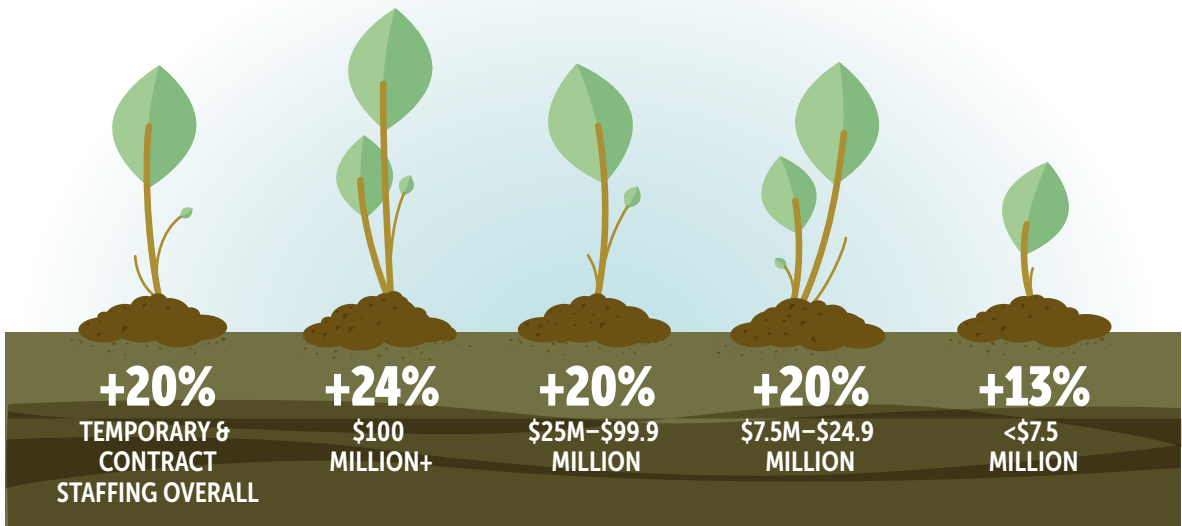
TAKE-AWAYS:

Measuring and forecasting GDP is a precarious endeavor. When the economy is advancing, staffing industry growth outpaces GDP. Historically, including times of recession, temporary and contract staffing employment has been a coincident economic indicator of GDP. Rather than rely on uncertain forecasts, and government estimates that may be delayed and seemingly are endlessly revised, follow the weekly ASA Staffing Index—it provides a near real-time barometer of current economic conditions. Visit americanstaffing.net/index.

NOTES:

STAFFING COMPANIES ANTICIPATE GROWTH

PROJECTED 2020–21 CHANGE IN REVENUE BY COMPANY SALES CATEGORY



Source: American Staffing Association, Staffing Employment and Sales Survey

TRENDS:

Staffing companies provide their outlook on future sales in the quarterly ASA Staffing Employment & Sales Survey. Overall, U.S. staffing agencies expect their 2021 revenue to exceed 2020 by 20%, with the larger companies (based on sales volume) exhibiting the highest confidence in their outlook (+24%). Smaller staffing firms are less optimistic and anticipate a 13% increase in revenue at year end.

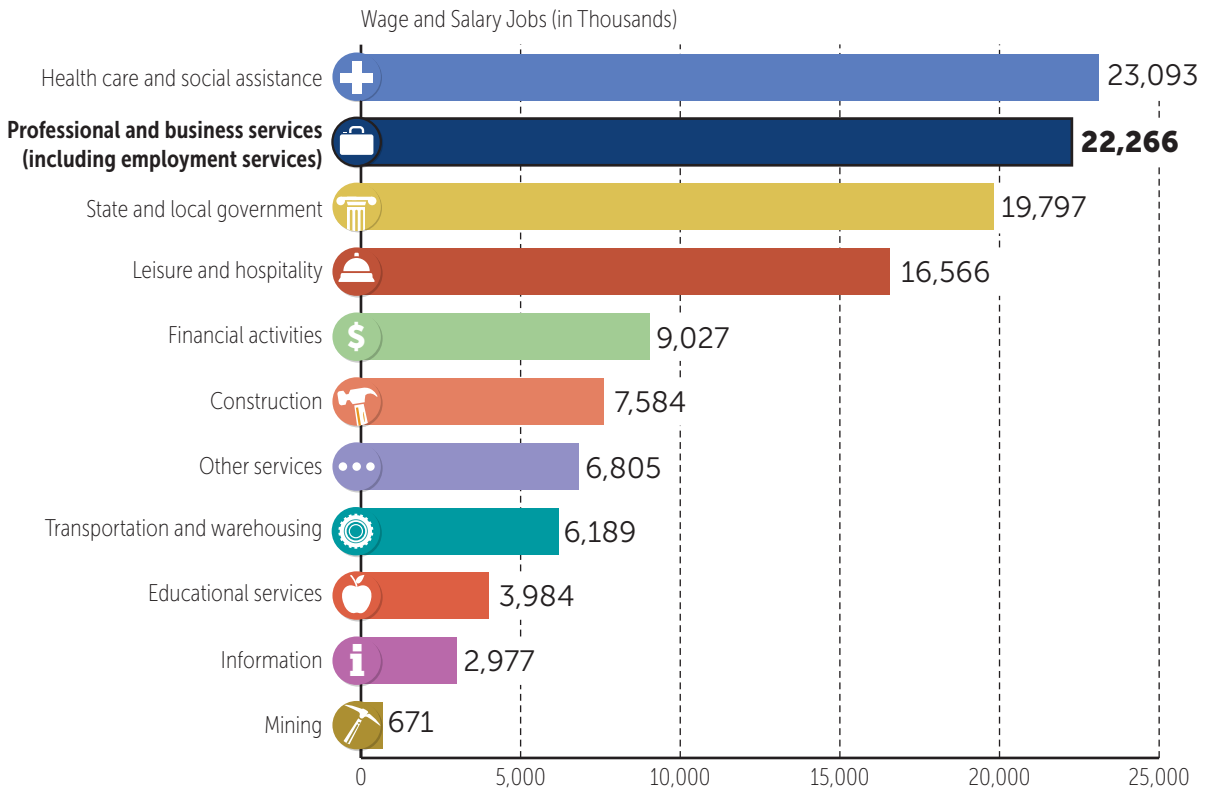
TAKE-AWAYS:

In 2021, these data are particularly useful as the staffing industry looks back at pandemic-affected 2020 and begins strategic planning for the coming years. Although the economy is still affected by the global pandemic, recession recovery is already underway. Across the board, the staffing industry projects double-digit increases in sales in 2021.

NOTES:

EMPLOYMENT GROWTH BY INDUSTRY

PROJECTED 2030 JOBS FOR GROWING SECTORS



Source: U.S. Bureau of Labor Statistics

TRENDS:

After losing a significant number of jobs to the pandemic in 2020, service-providing sectors are still projected to add 11.3 million jobs by 2030—reaching 134.1 million, according to the U.S. Bureau of Labor Statistics. This increase represents about 95% of all new jobs anticipated to be created over the next two decades. The health care and social assistance sector will drive nearly three in 10 of the additional jobs, and the professional and business services sector (including **employment services**) is expected to see continued growth.




TAKE-AWAYS:

The 134.1 million jobs in service-providing sectors expected by BLS by 2030 is down slightly from the prepandemic projection of 136.8 million jobs. However, this accounts for the jobs lost during the pandemic—with the Great Shutdown now past, staffing companies have an opportunity to help millions of U.S. job seekers find work. Learn more about the BLS employment projections in the article “What Employment Data Mean for the Future of Staffing” in the March–April 2021 issue of *Staffing Success*.

NOTES:

SECTOR GROWTH FACTORS

TOP SECTORS AND GROWTH FACTORS

	SECTOR	ANNUAL GROWTH RATE	2030 JOBS ('000s)	JOBS ADDED 2020-30 ('000s)	GROWTH FACTORS
	Health care and social assistance	1.6%	23,093	3,316	Aging population, longer life expectancies, and growing rates of chronic conditions
	Professional and business services (including employment services)	1.0%	22,266	2,020	Continued demand for computer systems design, consulting, and staffing services
	Leisure and hospitality	2.2%	16,566	3,240	Recovery from the pandemic-era closure of restaurants, hotels, and in-person establishments

Source: U.S. Bureau of Labor Statistics

TRENDS:

Health care and social assistance, and professional and business services remain among the industry sectors expected to grow the fastest over the next decade—due to an aging population with longer life expectancies increasing the number of chronic health conditions, and continued demand for computer systems design, consulting, and staffing services. The leisure and hospitality sector is also expected to add jobs at a rapid pace as the public seeks to resume recreational and in-person activities.

TAKE-AWAYS:

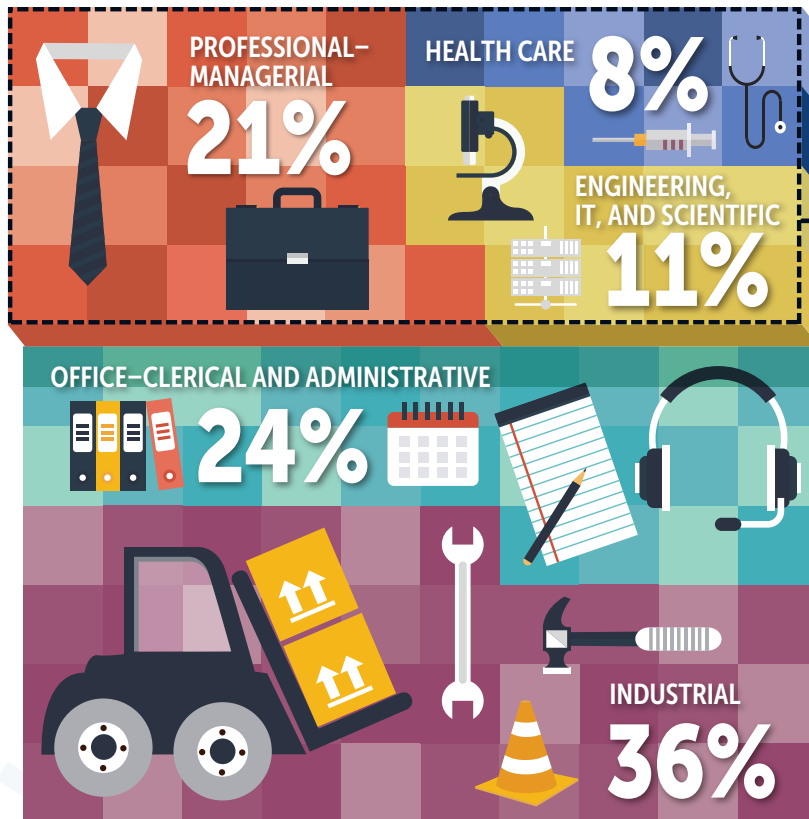
This postpandemic recession period is a rare opportunity for staffing companies as businesses are desperate to hire to keep up with renewed demand. There will continue to be temporary, contract, and permanent employment opportunities for job seekers in the coming years, even as the economy adapts to a changing workforce and workplace policies and procedures. Get more details on BLS employment projections in the article “What Will Employment Look Like Postpandemic?” in the November–December 2021 issue of *Staffing Success*.

NOTES:

OCCUPATIONAL DISTRIBUTION OF STAFFING EMPLOYEES

STAFFING ASSIGNMENTS SPAN VIRTUALLY ALL OCCUPATIONS

Temporary and Contract Employees by Sector (Percentage)



40%
OF STAFFING
EMPLOYEES
WORK IN
HIGHER-
SKILLED
OCCUPATIONS

Source: American Staffing Association, Staffing Employee Survey

TRENDS:

Temporary and contract staffing employees work in a broad array of jobs, from day laborer to nurse practitioner to chief executive officer. And their individual characteristics, as well as how they view their work, vary just as widely as their occupational distribution, according to results from the latest ASA Staffing Employee Survey among more than 8,200 temporary and contract workers in the U.S. Four in 10 (40%) are assigned to jobs that require higher education and skills in the professional–managerial; engineering, information technology, and scientific; and health care sectors. The other six in 10 work in the industrial and office–administrative sectors.

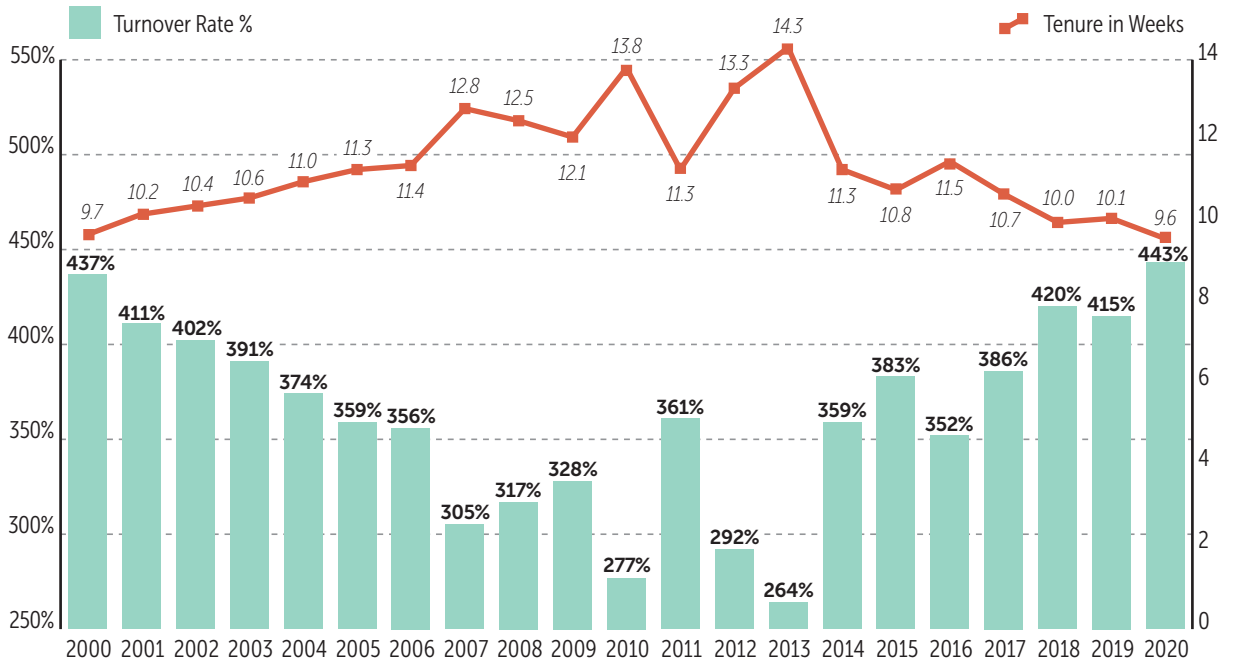
TAKE-AWAYS:

The data that illustrate the diversity of staffing employees among industry sectors also can make a compelling point during sales meetings with prospective clients, who often are not familiar with the wide range of markets the industry serves. Get more staffing employee stats in the article “Who Staffing Employees Really Are” in the September–October 2019 issue of *Staffing Success*.

NOTES:

STAFFING EMPLOYEE TURNOVER AND TENURE

STAFFING EMPLOYEE TURNOVER INCREASED TO 443%; TENURE EDGED DOWN



Source: American Staffing Association, Staffing Employment and Sales Survey

TRENDS:

The turnover rate for temporary and contract employees increased to 443% in 2020—up from 415% in 2019. The average tenure for staffing employment edged down to 9.6 weeks in 2020 from 10.1 weeks in 2019. Tenure—the duration of employment—is based on turnover. These two metrics are inversely related: The higher the turnover, the shorter the tenure, and vice versa.

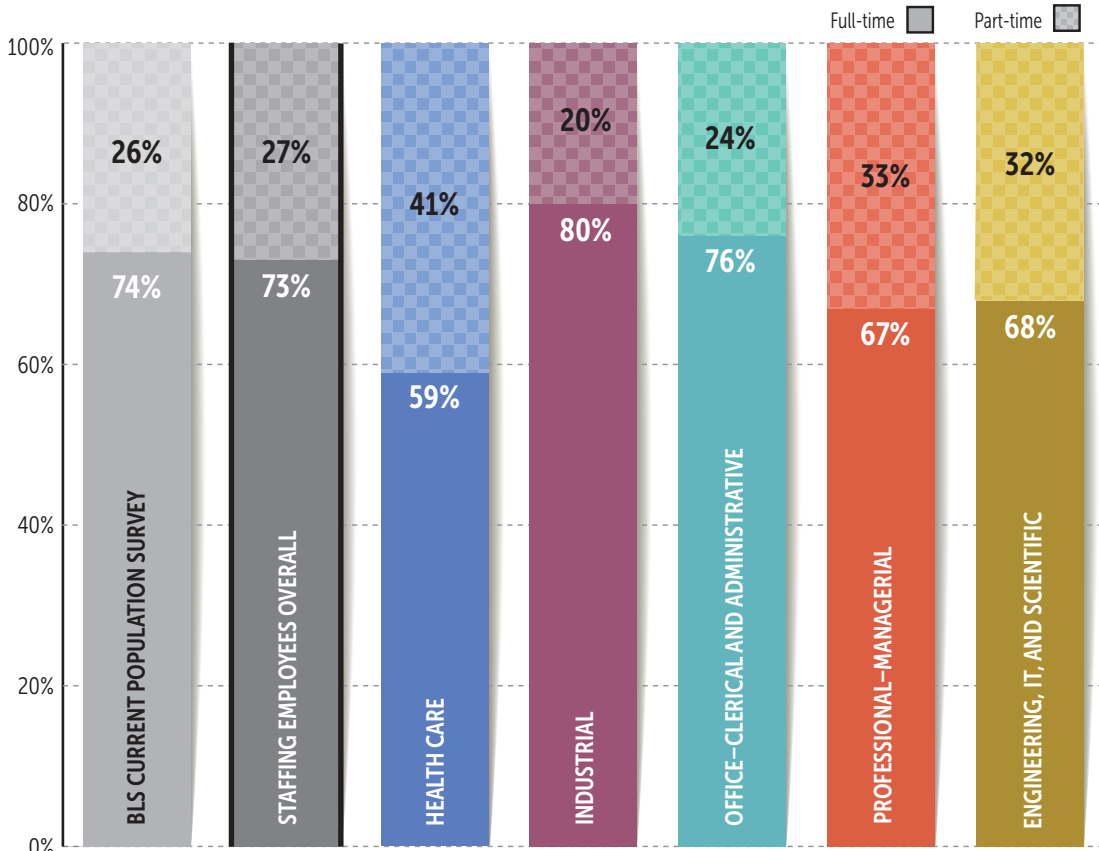
TAKE-AWAYS:

Employee turnover is an important statistic for staffing firms—it reflects how often staffing companies need to hire new employees. A high turnover rate means that employees average a shorter tenure; when the turnover rate decreases, it means that average employee tenure is longer. The lower the turnover rate, the lower the cost of recruiting, new-hire administrative expenses, training, and any other outlays associated with replacing employees. See examples and use the interactive calculator at americanstaffing.net/turnover.

NOTES:

STAFFING EMPLOYMENT STATUS

A MAJORITY OF STAFFING EMPLOYEES WORK FULL TIME



Source: American Staffing Association, Staffing Employee Survey

TRENDS:

Before the 2020 pandemic, nearly three-quarters (73%) of staffing employees worked full time (35 or more hours per week), and 75% of employed adults in the U.S. reported working permanent, full-time jobs, according to the U.S. Bureau of Labor Statistics Current Population Survey. Within the staffing industry, more temporary and contract employees on assignment in the industrial sector work full time (80%) than those in other sectors, and fewer (59%) in the health care sector—which ties with their more prevalent desire for schedule flexibility.

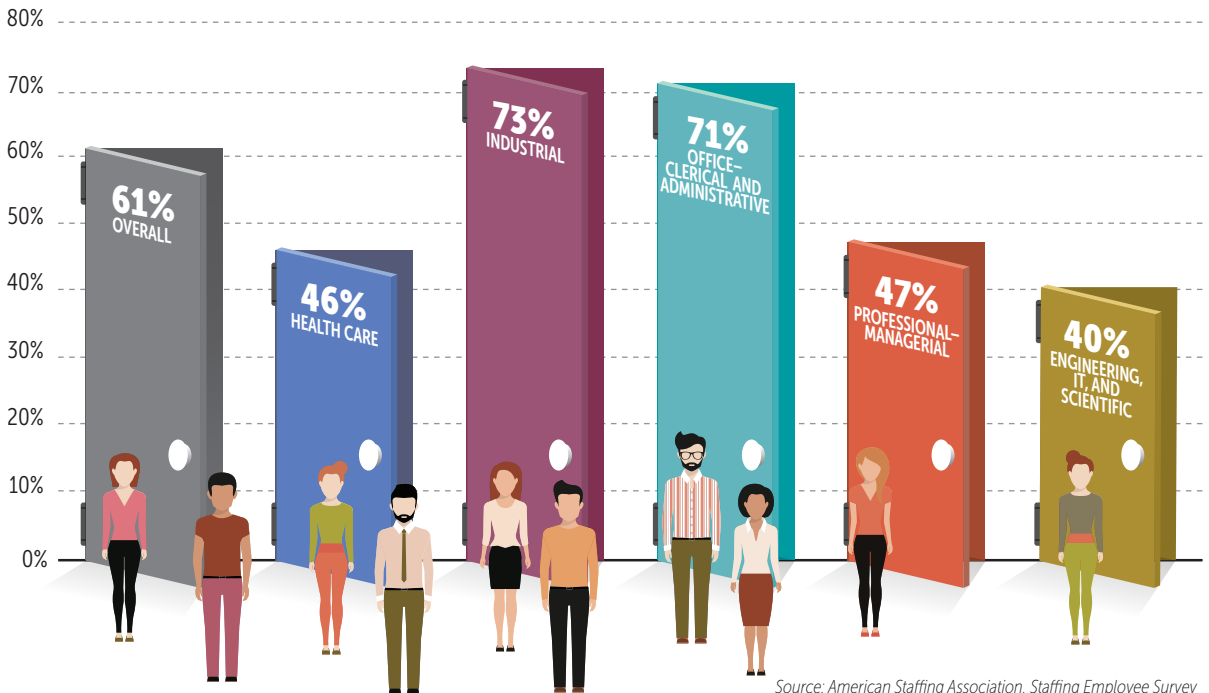
TAKE-AWAYS:

Permanent jobs often are perceived to be synonymous with full-time positions, and temporary work is often viewed as only part-time in nature. But this is far from the reality—and the proof lies in the latest ASA Staffing Employee Survey results. Generally, staffing employees are about as likely to work full time on assignment as are all adult workers. Get more survey details in the article “Who Staffing Employees Really Are” in the September–October 2019 issue of *Staffing Success*.

NOTES:

KEY STAFFING DRIVER BY SECTOR

GETTING A PERMANENT JOB IS A KEY DRIVER FOR CHOOSING STAFFING EMPLOYMENT



TRENDS:

Staffing employees have many motivations for selecting temporary and contract work. Six out of 10 (61%) choose staffing to fill the gap between jobs or as a way to help them gain access to and land a permanent job. These driving factors are strongest among those working in the industrial (73%) and office-administrative (71%) sectors.

Staffing employees are quite diverse, but they share a common belief—temporary and contract work is a means to fulfilling their employment goals.

TAKE-AWAYS:

Setting the right tone in communications with job seekers is critical, especially during a time of record high job openings and scarce talent. The staffing industry is a bridge to permanent employment for millions of workers every year. Promote this fact with candidates and you'll be tapping into one of the main factors motivating job seekers to turn to the staffing industry. See the *New Language of Staffing Handbook* for details on how to effectively talk to talent.

NOTES:

STAFFING EMPLOYEE SATISFACTION

TEMPORARY EMPLOYEES ARE SATISFIED WITH THEIR STAFFING COMPANY



Source: American Staffing Association, Staffing Employee Survey

TRENDS:

Whether temporary and contract employees are looking for permanent, full-time jobs or the flexibility to work part time, and no matter the sector they work in, nine out of 10 (92%) are satisfied with their staffing company. So, it's not surprising that eight out of 10 (81%) say they would refer a family member or friend to work as a staffing employee.

TAKE-AWAYS:

It is a job seekers' market, with a record number of job openings. The high level of satisfaction temporary and contract workers have with their staffing agency is a prime equity that should be shared with prospective talent when recruiting. The more candidates know about the benefits of working with a staffing company, the more successful the staffing company can be throughout its recruiting and engagement efforts. Visit americanstaffing.net/new-language for ideas on how to effectively communicate with job seekers.

NOTES:

METHODOLOGY OF ASA ECONOMIC SURVEYS



ASA STAFFING EMPLOYMENT AND SALES SURVEY

The American Staffing Association provides the only survey-based quarterly estimate of U.S. temporary and contract staffing sales. The quarterly ASA Staffing Employment and Sales Survey—which covers approximately 10,000 establishments (about a third of the industry)—also tracks employment and payroll, with results that parallel the establishment surveys of the U.S. Bureau of Labor Statistics. The survey is used to estimate total industry employment, sales, and payroll, based on a model developed for ASA by Standard & Poor's DRI / McGraw-Hill in 1992. DRI conducted a census of ASA members and a survey of selected nonmember firms. Using this and related government data, DRI prepared annual estimates for 1990 and 1991 and a stratified-panel, survey-based estimation model to be used quarterly from 1992 forward.

To preserve the confidentiality of individual company responses, a market research firm collects and tabulates the data and reports only aggregate results to ASA. Survey participants include more than 100 small, medium, and large staffing companies that together provide services in virtually all sectors of the industry. The participants enter data for employment, sales, and payroll for the most recent quarter and, to ensure validity and continuity, the relevant previous quarters. Responses are stratified by company size and used to derive growth rates for each stratum. Strata for each metric are weighted based on the proportionate market share of similarly sized companies. These growth rates are applied quarter by quarter to aggregate benchmark estimates for temporary and contract staffing employment, sales, and payroll.

ASA STAFFING INDEX

The ASA Staffing Index tracks temporary and contract employment trends. The index survey methodology essentially mirrors that of the quarterly ASA Staffing Employment and Sales Survey. ASA Staffing Index values, based on survey results, are typically posted nine days after the close of a given workweek, providing a near real-time gauge of staffing industry employment and overall economic activity. Participants include a stratified panel of small, medium, and large staffing companies that together provide services in virtually all sectors of the industry. Similar to the quarterly ASA Staffing Employment and Sales Survey, percentage changes in employment are derived by weighting responses according to company size categories.

Three metrics are published each week. The first is the index value itself, which depicts staffing employment trends over time. The second and third are the weekly and year-to-year percentage changes in staffing employment. All three numbers are posted throughout the ASA website, *americanstaffing.net*. The index is calculated by applying the weekly percentage change in employment to a reference value set at 100 for the week of June 12, 2006. The index reflects the percentage change in employment since that reference week—so when the index reaches 200, it would indicate that staffing employment had doubled since June 2006. The index does not estimate total industry employment; the quarterly ASA Staffing Employment and Sales Survey provides that data. ASA developed the index with the expertise of the Lewin Group, an economic research firm. >>>





HELP PREVENT WORKPLACE HARASSMENT



Provide Training for Temporary Workers. Comply With the Law.

The prevention of harassment—in all its forms—is a top priority of the staffing industry, and the American Staffing Association is committed to helping staffing companies promote a lawful and mutually beneficial relationship with workers placed on assignments with clients.

Just like other types of employees, temporary employees are protected by employment laws—including those pertaining to harassment.

ASA has partnered with Kantola Training Solutions to provide cost-effective and state-specific online training for the workers staffing companies employ. Plus—ASA members receive a discount.

ASA also offers a basic harassment prevention training product in collaboration with the New York Staffing Association. See nystaffing.org for details.

Kantola provides a full-service online training solution. This engaging online experience was co-developed with Littler, the world's largest labor and employment law firm.

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- Upload learners and assign courses
- Embed your policy and contact information into the course
- Create and schedule customizable emails and automated reminders to candidates and employees
- Track candidate and employee progress
- Download status reports



Go to americanstaffing.net/harassmentprevention for details.



American Staffing Association

BENCHMARKS

Both the quarterly ASA Staffing Employment and Sales Survey and the weekly ASA Staffing Index rely on periodic benchmarks from the U.S. Census Bureau. When developing the quarterly survey methodology in 1992, DRI used the 1987 Economic Census of service industries as well as several other sources in estimating industry size and market share weights—long before the introduction of the North American Industry Classification System. Data from the 1997 census, the first to use NAICS, delineated “temporary help services” more clearly than the Standard Industrial Classification it replaced. Using the 1997 NAICS-based census also provided better comparability and continuity of data for the 1990 to 2002 period than the original DRI estimates, particularly given that the principal interest in the results of the quarterly survey has been changes over time rather than absolute levels of employment, sales, and payroll.

Data from the 2002 census were used as benchmarks for the quarterly survey results from 2002 through 2006, while the 2007 census data were used to benchmark quarterly survey results from 2007 through 2011. The 2007 census data were also used as benchmarks for the index back to 2006; 2006 and 2007 were peak—and similar—years for the staffing industry, and the index covered only the last six and a half months of 2006, which were much more like 2007 than 2002, the previous census year (and hence the next available benchmark). In 2011, given newly released benchmark data from the 2007 Economic Census, ASA revised historical figures for staffing employment, sales, and payroll back to 1990 and ASA Staffing Index values to the index’s inception in 2006. The 2012 Economic Census Core Business Statistics Series, released in March 2016, was used to revise quarterly survey results from 2012 through 2015, and the index values were revised from its inception in 2006 through 2015.



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COMPARISON WITH BLS

ASA and BLS have similar—but different—survey methodologies. The ASA quarterly survey and weekly index generally track with BLS monthly employment trends. However, because ASA benchmarks to the U.S. Economic Census and BLS uses its own benchmarks, each organization draws different conclusions on total staffing employment. Moreover, BLS seasonally adjusts its data—and makes numerous revisions—while ASA does not seasonally adjust and makes revisions only every five years, when benchmark census data become available.

Further complicating comparison, BLS counts corporate employees of staffing firms along with temporary employees, and it is unclear if or where contract employees are captured. ASA counts only temporary and contract staffing employees.

The quarterly ASA Staffing Employment and Sales Survey and the weekly ASA Staffing Index are administered by ASA corporate partner ClearlyRated.



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A CLOSER LOOK AT **ASA CORPORATE PARTNERS**

PARTNERS IN YOUR SUCCESS

In 2007, the American Staffing Association introduced a comprehensive corporate partnership program. ASA now has multiyear corporate partnerships with five companies: Bullhorn, ClearlyRated, Essential StaffCARE, Monster, and World Wide Specialty.

The ASA corporate partnerships go beyond traditional sponsorships. They involve mutual commitments to long-term working relationships focused on benefiting both ASA and the partners as organizations dedicated to advancing the interests and meeting the needs of ASA members and the staffing industry.

For the partnerships to truly succeed, however, members must do their part: Please join the ASA board of directors and staff in thanking these corporate partners for their support of the association, its members, and the staffing industry.



Bullhorn, a proud corporate partner and longtime supporter of ASA, is a human-centric customer relationship management (CRM) company that helps businesses proactively manage relationships.

Bullhorn is a global leader in CRM and operations software for the recruitment industry. More than 11,000 recruitment companies rely on Bullhorn's cloud-based platform to drive sales, build relationships, and power their recruitment processes from end to end.

Headquartered in Boston, with offices around the world, Bullhorn is founder-led and employs more than 950 people globally. To learn more, visit bullhorn.com or follow @Bullhorn on Twitter.



ClearlyRated has worked with ASA since early 2007 to conduct surveys that gather information on trends in the staffing industry as well as feedback from ASA members on their membership experience.

ClearlyRated is a leading provider of client and talent online feedback systems for the staffing industry, and administers the Best of Staffing competition to recognize the industry's top service performers.

The ClearlyRated Net Promoter Score survey package is designed to help staffing firms leverage client and candidate feedback in a way that protects existing revenue, nurtures a high-caliber talent pipeline, celebrates service wins, and powers your firm's growth. Visit clearlyrated.com/solutions to learn more.



Essential StaffCARE has been a sponsor of Staffing World, the ASA annual convention and expo, for 15 years; is actively involved with ASA-affiliated chapters across the country; and is proud to be an ASA corporate partner.

Essential StaffCARE is a leading provider of ACA-compliant health insurance and supplemental employee benefit plans to the staffing industry. Serving more than 1,800 clients, Essential StaffCARE offers ACA-compliant minimum essential coverage plans, fully insured major medical plans, supplemental fixed indemnity plans, and electronic enrollment technology.

Essential StaffCARE built its business from the ground up by developing innovative insurance products, benefits administration, and enrollment methods designed specifically for staffing companies.

Essential StaffCARE provides ASA members with new insurance products that deliver improved coverage, superior administration, and high enrollment results.



ASA corporate partner Monster is a global leader in connecting the right people to the right jobs. Every day, Monster aims to make every workplace happier and more productive by transforming the way employers find talent and candidates find careers. For 25 years, Monster has worked to transform the recruiting industry. Monster has working relationships with staffing firms all over the world and is dedicated to its alliance with ASA in order to provide better recruiting tools and knowledgeable support to Monster's customers and the entire staffing industry.

With technology at the center of Monster's award-winning innovations and market-leading solutions, Monster staffing services empower companies to recruit more efficiently and effectively than ever before. By delivering a comprehensive set of managing, matching, and advertising services, Monster offers custom staffing solutions for companies of all sizes. It also provides access to Monster's extensive database of candidates and the full support of a dedicated staffing sales team.



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Our People Are What Sets Us Apart



**“I watched my parents
risk everything
they had....”**

“In the early 80’s I was in high school and working part-time

at Kmart. The economy was getting really bad and my dad lost his job, so there was no steady paycheck coming in, except for mine. I was still working, many weeks juggling full time hours while going to high school.

My parents decided to start a cleaning service, and I watched them risk everything to build their business. This resonates with me when I meet with staffing owners.

Much like my parents, I see all that staffing owners put into their businesses and the impact good business partners have on their success. In my role at TRICOM, I feel fortunate to be able to help them with real solutions specific to their individual situations — from administrative services, to funding, and everything in between.

I saw my parents become very successful and have a good life. Knowing that I can have that same impact on staffing owners drives me to help them.”

— Shelly Wilkinson, Director of Sales, TRICOM

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