

STAFFING Success

SPECIAL ISSUE | 2020

THE MAGAZINE OF THE AMERICAN STAFFING ASSOCIATION

ASA ANNUAL ECONOMIC ANALYSIS 2020

STAFFING INDUSTRY PLAYBOOK

Whether you're an economist, analyst, investor, or staffing professional, the data-driven information and insights delivered in this book are critical to evaluating disruptions now and determining strategic planning and business development for the future. Here's what you need to know about the U.S. staffing and recruiting industry, where it's headed, and how you can make the most of this business intelligence.

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HERE IS YOUR ANNUAL ECONOMIC ANALYSIS

This special issue of *Staffing Success* delivers important economic and industry data you can use to hone operational strategies for your business.



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





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ASA ANNUAL ECONOMIC ANALYSIS 2020

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 2020 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.

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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.

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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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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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*2020 MetLife Benefit Trends

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GETTING AMERICA **BACK TO WORK**



By Richard Wahlquist,
President and CEO

This special issue of the association's magazine is a valuable tool, especially as staffing companies must increasingly help clients navigate the economic uncertainty caused by the pandemic-induced recession.

It's a whole new world and one that's not like anything that any of us could have planned for or imagined.

Last year at this time, we were in the 11th year of continued economic growth—the longest period of expansion in U.S. history. Unemployment was at a 50-year low. And global business leaders reported that their top internal concern was “the failure to attract and retain top talent.”

While fears that the next global recession were increasing, there were no storm clouds on the horizon to suggest that in early 2020 an economic tsunami of unprecedented force and magnitude would crush global markets, disrupt entire business sectors, and devastate billions of lives worldwide.

And at this writing, it's still too soon to talk about rebuilding in the Crisis of 2020 aftermath. The best minds in the fields of science and economics cannot forecast when we will all be able to return to our new normal.

ANALYZING THE DATA

In the early days of most recessions, there are warning signals that we can look to that suggest that a downward correction may be imminent. **As a leading employment indicator, the staffing industry has historically been a good gage of what's ahead.** Because recessions typically develop over a period of several months, the downward slope—although painful—can be anticipated and managed.

As you will see graphically depicted in this Playbook, this time there was no downward slope, the staffing industry along with most of the rest of the global economy went off a cliff. GDP dropped by an unprecedented 32.9% in the second quarter and according to the ASA Staffing Index, the staffing industry immediately contracted by almost the exact same amount.

The early hopes for a V-shaped recovery are behind us and now the most optimistic economists are hoping for a recovery that is shaped like the Nike swoosh—a sharp drop followed by a long and gradual upward slope over the months and years ahead. Others suggest that we will likely see a second wave of Covid-19 in the fall or winter, with new mandatory stay-at-home orders and business closures which produce a W-shaped or even the dreaded L-shaped recovery.

Given the current levels of uncertainty, short-term strategic financial planning for governments, businesses, and families has never been more challenging. Covid-19 has made all of us into strategic scenario planners. And building a high degree of flexibility into those scenarios is more essential than ever before.

RECOVERING SUSTAINABLY

One of the lessons learned from previous recessions: **During the early stages of economic recovery, businesses are hesitant to add back too many permanent staff too soon.** They need to ensure that the recovery is sustainable before making new long-term human capital investments.

Helping clients navigate through uncertainty and recovery while achieving the highest degrees of efficiency when it comes to their talent optimization strategies is central to the industry's value proposition, today, and in the future.

In this highly unsettled and unsettling period of global history, we are optimistic about the industry's future and proud of the role the industry will play as staffing companies like yours help get the economy back on track and help get America back to work. ■

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.



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ASA ANNUAL ECONOMIC ANALYSIS 2020

STAFFING INDUSTRY PLAYBOOK

Savvy staffing professionals, economists, analysts, investors, business development strategists, and other followers of the industry are in a constant state of reconnaissance. They use this playbook as part of their information-gathering and analysis activities to become more agile in their business decisions, keep ahead of employment trends, and allow them to capitalize on areas of opportunity.

Historical business cycles and patterns have been disrupted by the Crisis of 2020, precipitated by the Covid-19 pandemic. The U.S. now is in a unique recession, which ended the longest expansion on record.

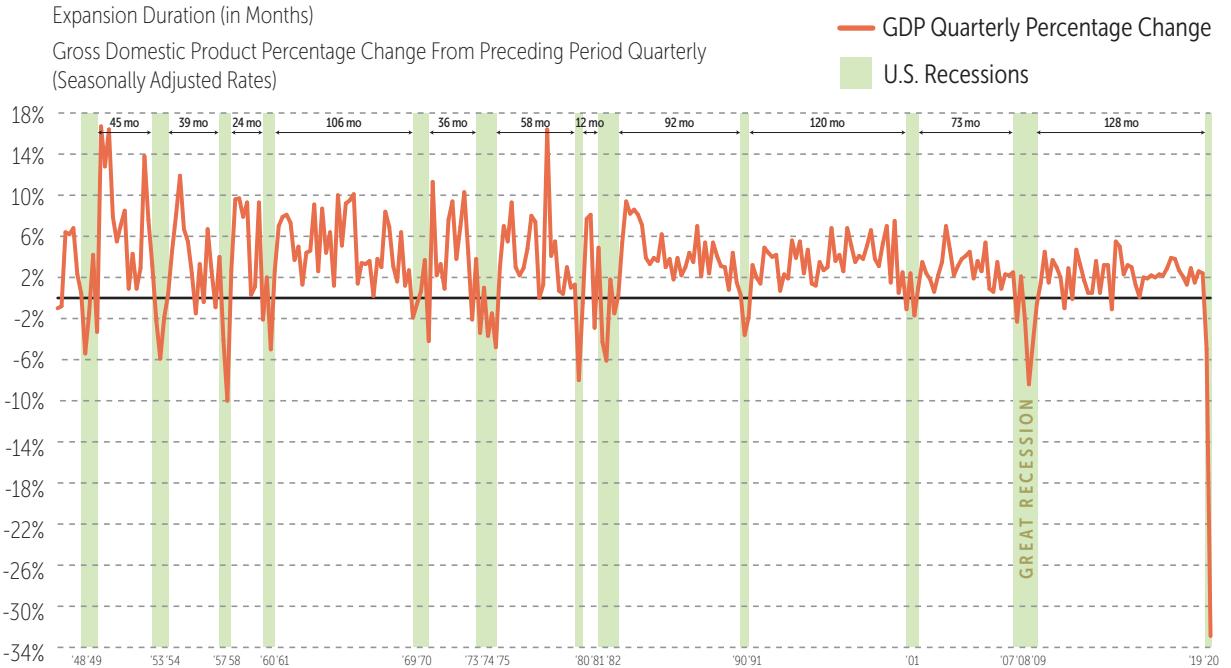
The economy has been upended by the Great Shutdown with gross domestic product plummeting to an all time low and unemployment spiking to unprecedented levels. The pandemic-induced employment crisis has plunged workforce participation to a near 50-year low, and staffing employment has dipped to an all-time depth.

Forecasting is a precarious business even in the best of times, so it is no wonder a consensus is lacking regarding when the economy will begin to recover and the nation will collectively get back to work.

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

ECONOMIC EXPANSION

THE CRISIS OF 2020 ENDS HISTORICALLY LONG EXPANSION



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

TRENDS:

At 18 months, the Great Recession was the longest—as well as the most severe—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. Since WWII, the average expansion has been just under five years. In February 2020, the Covid-19 pandemic plunged the nation into an economic crisis, ending the Great Recession expansion at 128 months—the longest in recorded history.

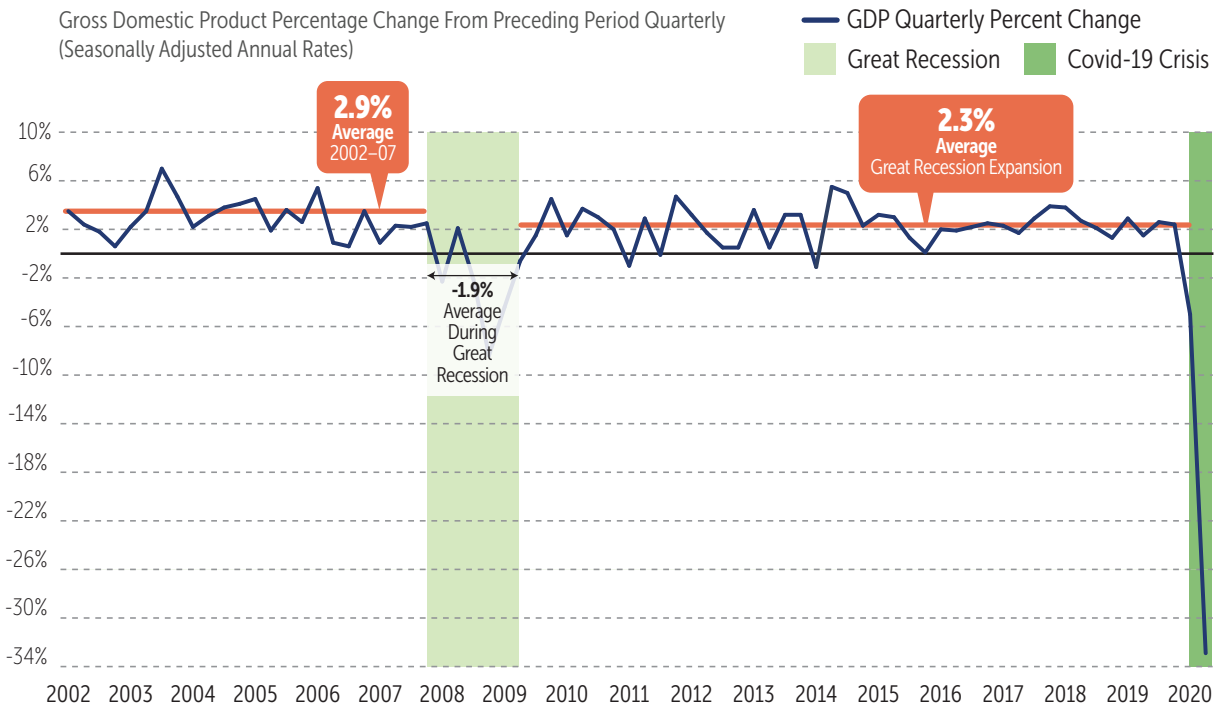
TAKE-AWAYS:

The economic Crisis of 2020 is an unusual recession in the way it was determined by the Business Cycle Dating Committee of the National Bureau of Economic Research. Recessions are typically defined by a sharp decline in economic activity that lasts more than a few months. Recognizing that the pandemic-induced downturn has different characteristics and dynamics than previously observed, the committee concluded that the unprecedented magnitude of decline in employment and production warranted the designation of a recession, even if brief in duration.

NOTES

GROSS DOMESTIC PRODUCT

GDP GROWTH PLUMMETS TO HISTORIC LOW DURING CORONAVIRUS RECESSION



Source: U.S. Bureau of Economic Analysis

TRENDS:

During the Great Recession, average quarterly gross domestic product dropped 1.9%. Recovery from the recession was slow and weak. During that expansion from July 2009 to February 2020 (when the National Bureau of Economic Research determined the Covid-19 financial crisis had begun), 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. GDP plummeted 32.9% during the second quarter of 2020—the greatest decline since World War II.

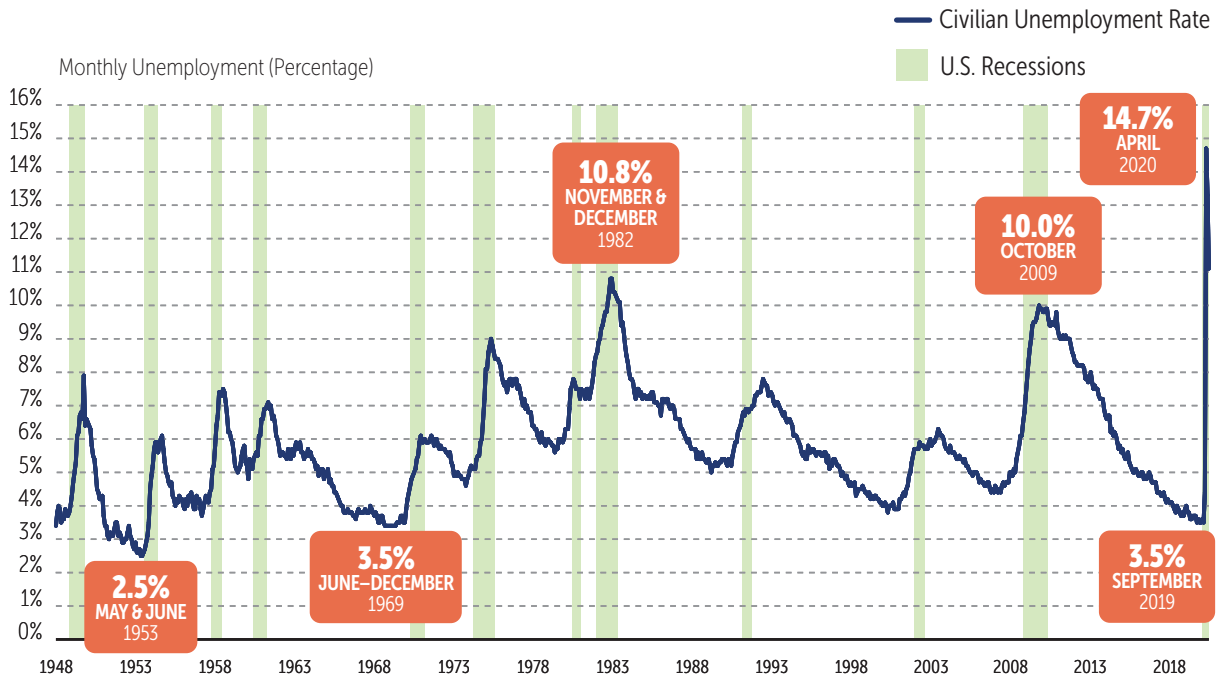
TAKE-AWAYS:

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 22) to track staffing employment and economic trends during the current financial crisis.

NOTES

UNEMPLOYMENT RATE

THE GREAT SHUTDOWN SPURRED RECORD-HIGH UNEMPLOYMENT IN 2020



Source: U.S. Bureau of Labor Statistics

TRENDS:

After reaching a 26-year high of 10.0% during the Great Recession, the unemployment rate began a downward trend and in September 2019 hit a low not seen in 50 years. The Great Shutdown spurred a historical spike in unemployment with a rate of 14.7% in April 2020—simmering slightly to 11.1% in June and ticking down to 10.2% in July.

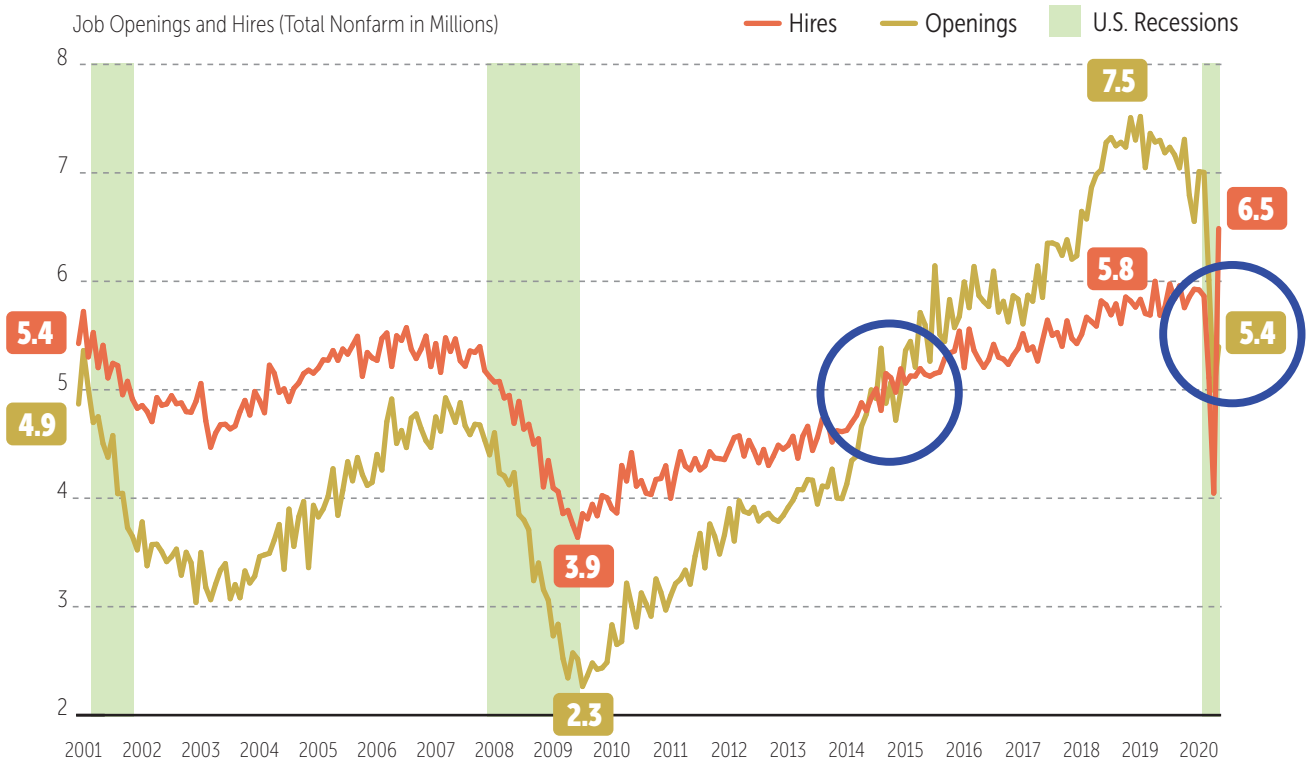
TAKE-AWAYS:

Gone are the days of speculating about the reasons for low unemployment and whether the rate is a sufficient indicator for labor market health. The question now is when the economy will stabilize and what can be done to get the unemployed back to work. Staffing employment and services, now more than ever, are options that job seekers and businesses should consider during recession periods.

NOTES

JOB OPENINGS AND HIRES

EMPLOYMENT CRISIS REVERSES TREND—
HIRES AGAIN EXCEED JOB OPENINGS



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. In November 2018, the number of job openings totaled 7.5 million—the highest number since reporting of the metric by the U.S. Bureau of Labor Statistics began in 2000—while hires amounted to 5.8 million. The Covid-19 pandemic has caused the trend to revert, with a historic level of 6.5 million hires in May 2020 exceeding a dwindling 5.4 million job openings.

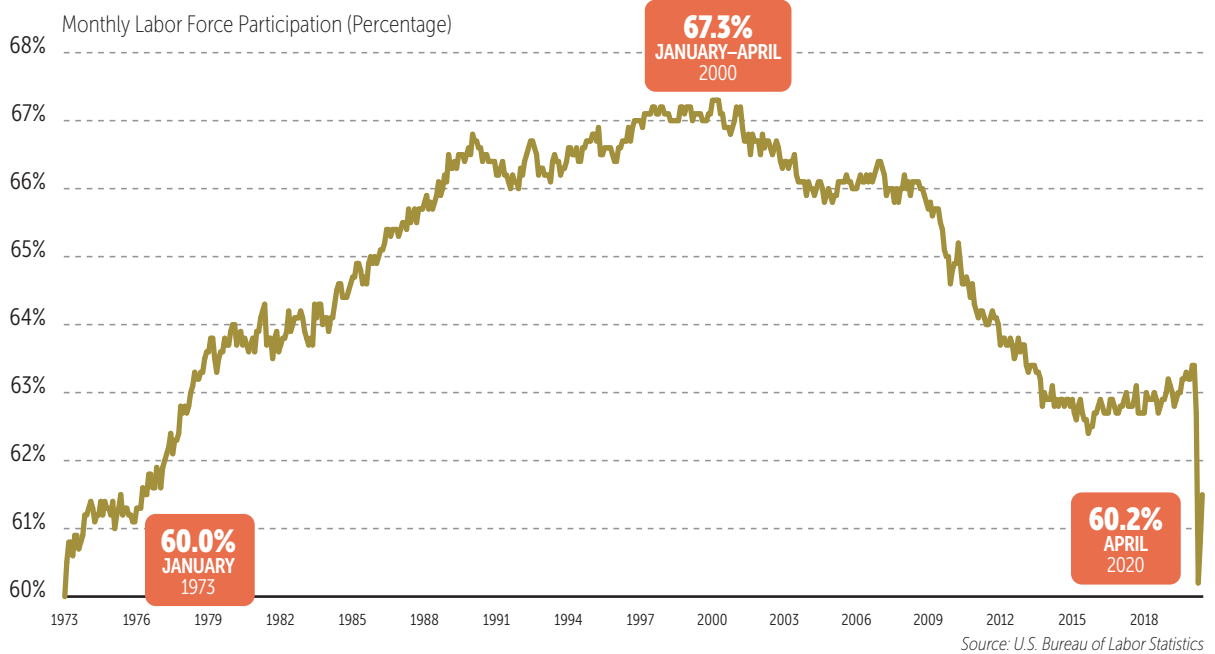
TAKE-AWAYS:

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 has disrupted economic cycles and employment trends in unique ways. While there is uncertainty as to when or if trends will return to historic cycles, it is becoming clear that the changing work landscape will require training, reskilling, and upskilling of talent in the U.S.

NOTES

LABOR FORCE PARTICIPATION RATE

WORKFORCE PARTICIPATION SINKS TO NEAR 50-YEAR LOW



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. During the past two decades, the participation rate gradually declined, reaching 62.4% in September 2015—a level not seen in nearly 40 years—and plummeting to a near 50-year low of 60.2% in April 2020 as a result of the pandemic-induced employment crisis.

TAKE-AWAYS:

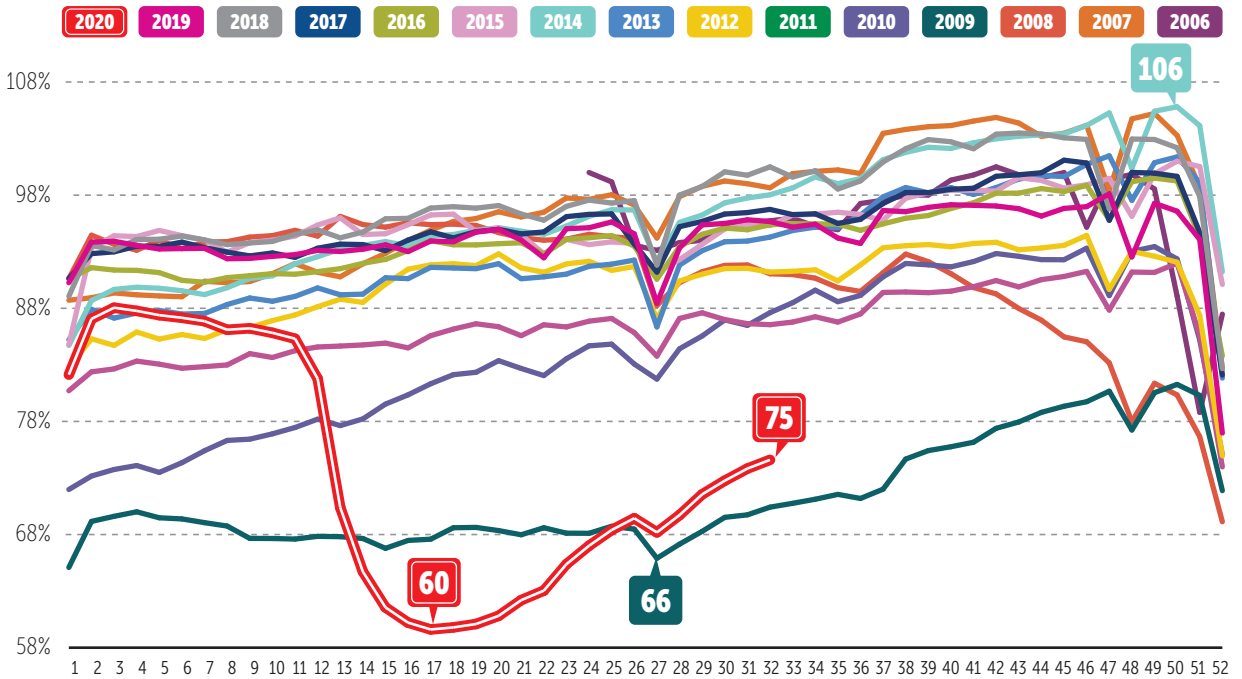
With the abrupt halt to economic expansion and employment growth caused by the Great Shutdown, economists posit that it will be years before the labor market and participation rate recover to even the moderate levels seen over the past five years. Employers, including staffing companies, will need to be open to new possibilities and get creative in how they source and place qualified talent.

NOTES

ASA STAFFING INDEX

STAFFING EMPLOYMENT SINKS TO RECORD LOW AMID PANDEMIC

52 Weeks of ASA Staffing Index: June 2006 (When the Index Was Introduced at 100) Through August 2020



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 fell to 66 in midsummer 2009, as the Great Recession ended, and rose to a record high of 106 in December 2014. In week 17 of 2020, the index sank to a record low of 60 amid the Crisis of 2020 caused by Covid-19. The shape and speed of recovery will be determined by timing and level of virus containment.

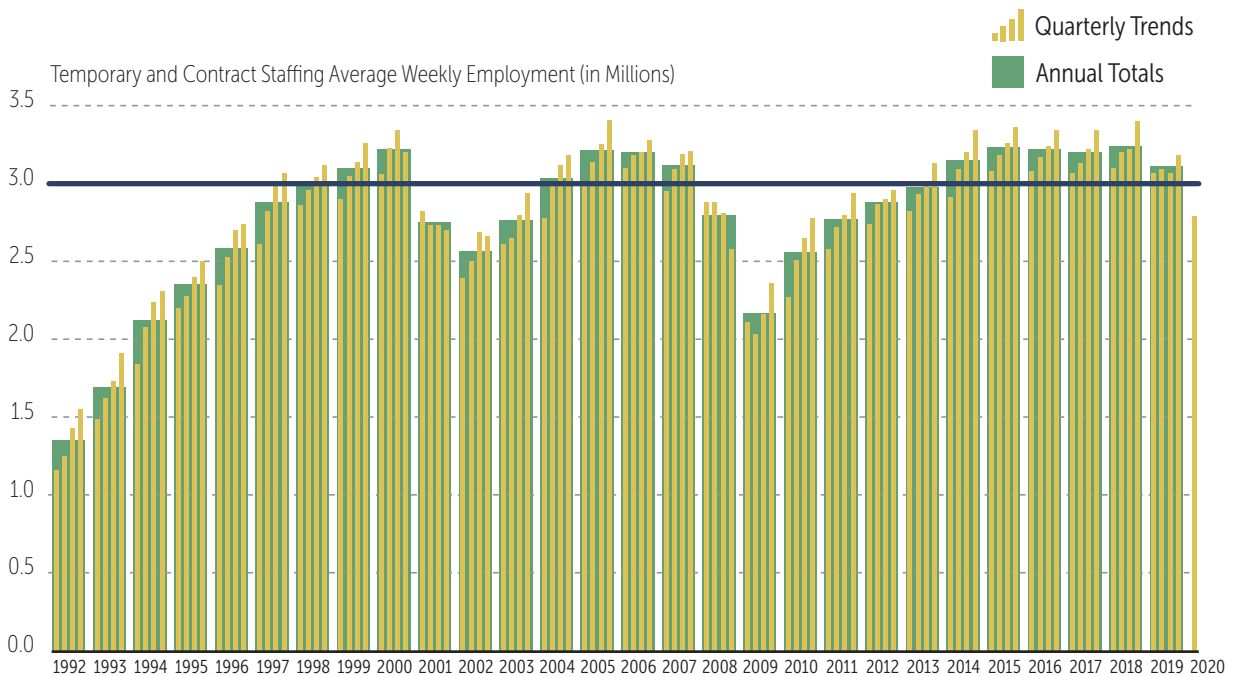
TAKE-AWAYS:

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 volatile times for the labor market and economy. Follow the weekly trends at americanstaffing.net/index.

NOTES

AVERAGE WEEKLY STAFFING EMPLOYMENT

U.S. STAFFING JOBS DIP BELOW THREE MILLION FOR FIRST TIME IN SIX YEARS



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-month 2008–09 Great Recession. In 2019, U.S. staffing companies employed an average of 3.10 million temporary and contract workers per week, down 4.1% from the 2018 record high. During first quarter 2020, the Great Shutdown precipitated by Covid-19 caused staffing jobs to dip below three million for the first time in six years.

TAKE-AWAYS:

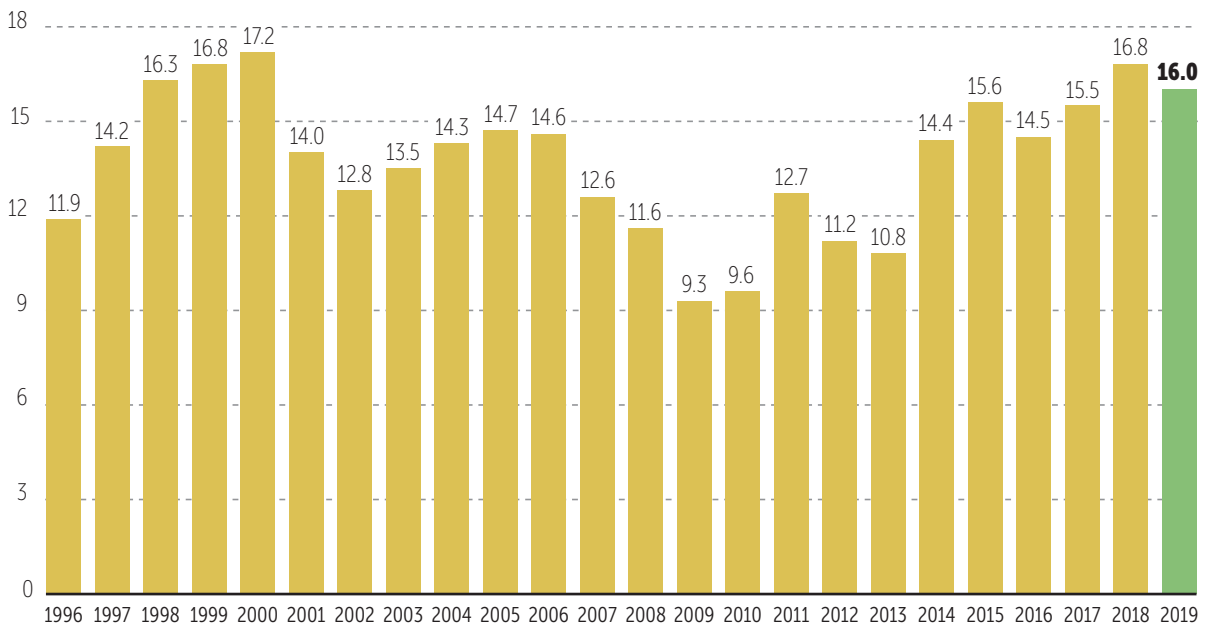
The quarterly ASA Staffing Employment and Sales Survey provides staffing data covering approximately 10,000 establishments, including changes in sales, payroll, and employment, broken down by five broad industry sectors and four sales categories. Use the results of the survey to monitor quarterly and 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

U.S. STAFFING COMPANIES HIRED 16 MILLION TEMPORARY AND CONTRACT EMPLOYEES DURING 2019

Total Annual Temporary and Contract Staffing Employment (in Millions)



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 2019, U.S. staffing companies hired a total of 16.0 million temporary and contract employees. This is a 5% decrease from 16.8 million in 2018, which was a nearly 20-year high.

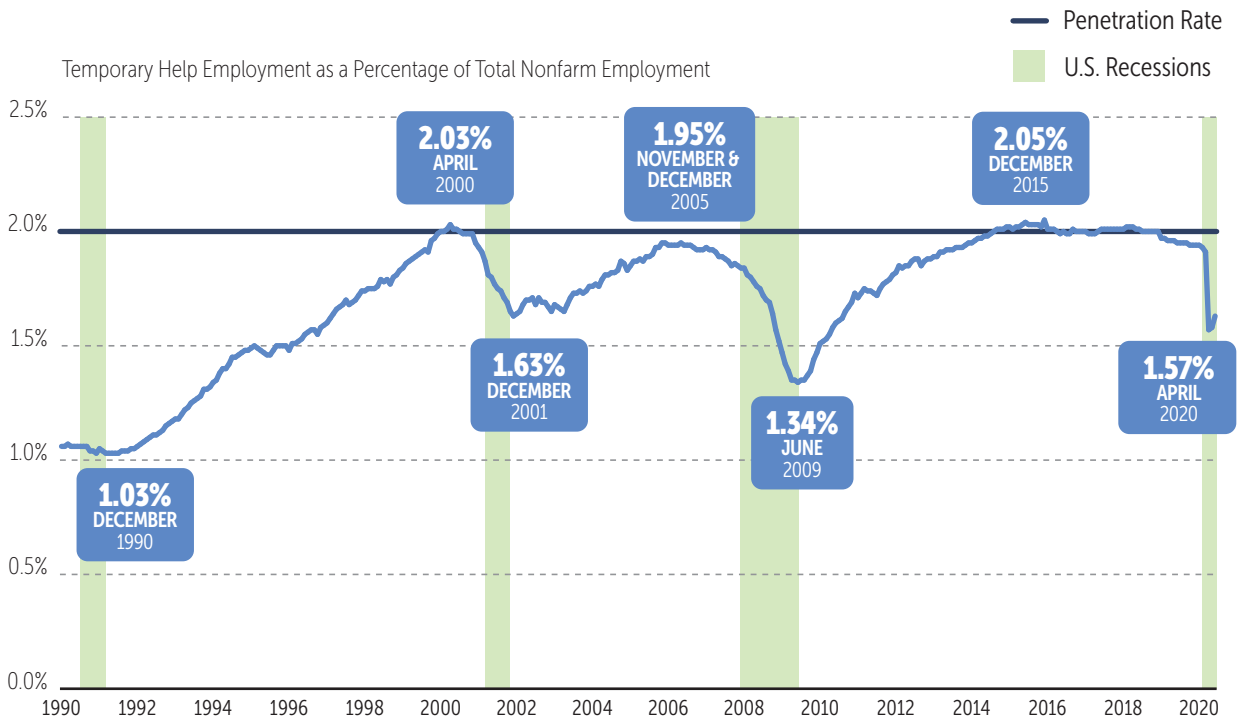
TAKE-AWAYS:

What's behind the slight decrease in the number of staffing employees during 2019? In addition to a slowdown in employment growth overall, turnover was a factor. The industry saw a nominal uptick in assignment duration, and firms redeployed fewer workers on new placements. It remains to be seen how the staffing industry will fare in the Crisis of 2020, but already it's clear that competition for talent is fiercer 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 meeting client demand in the new, pandemic-induced landscape.

NOTES

STAFFING PENETRATION RATE

STAFFING PENETRATION RATE SLIDES 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 leveled at about 2% before diving to 1.57% in April 2020 during the Covid-19 pandemic.

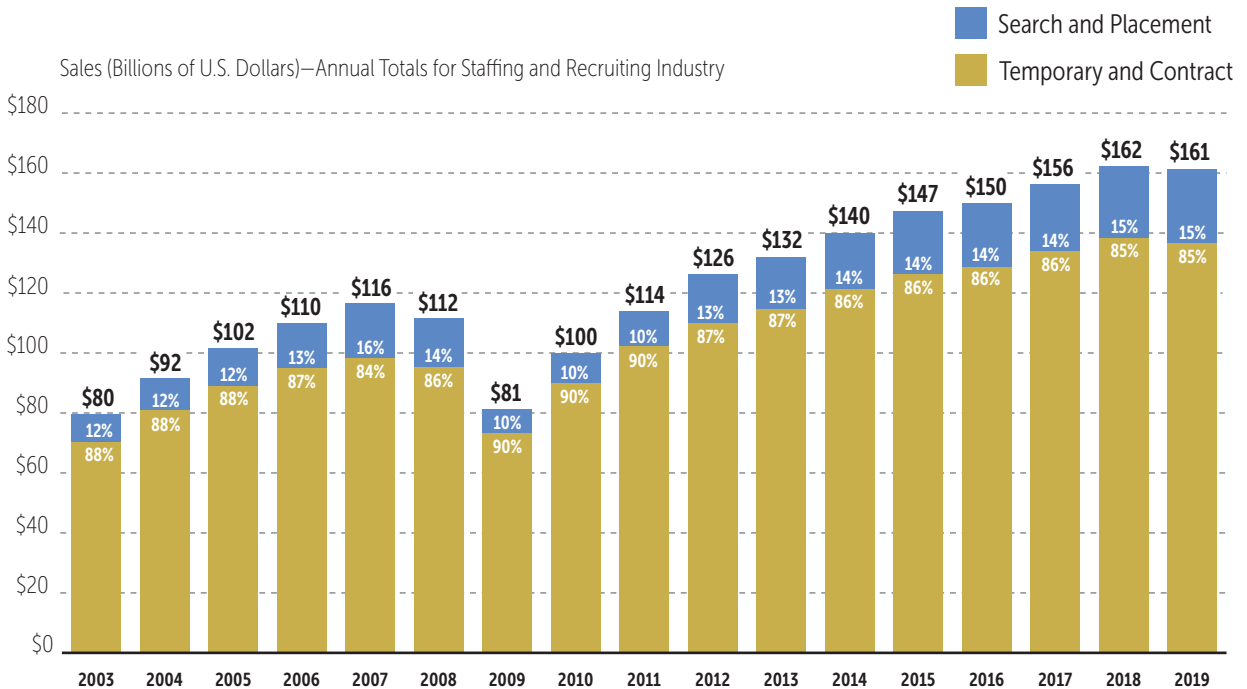
TAKE-AWAYS:

The role the staffing industry plays in the U.S. economy continues to be essential even during the economic and employment crises of 2020. The Great Shutdown recession is so unique that economists and industry observers alike are reserved in offering even speculation 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 DECREASED 0.6% TO \$161 BILLION IN 2019



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

TRENDS:

Temporary and contract staffing sales totaled \$136.7 billion in 2019, a decrease of 1.3% from 2018, according to the latest annual data from the ASA Staffing Employment and Sales Survey. Search and placement sales grew 3.4%, according to Staffing Industry Analysts, totaling \$24.7 billion in 2019.

Considering temporary and contract staffing combined with search and placement services, U.S. staffing and recruiting industry sales totaled \$161.4 billion in 2019, 0.6% less than in 2018.

TAKE-AWAYS:

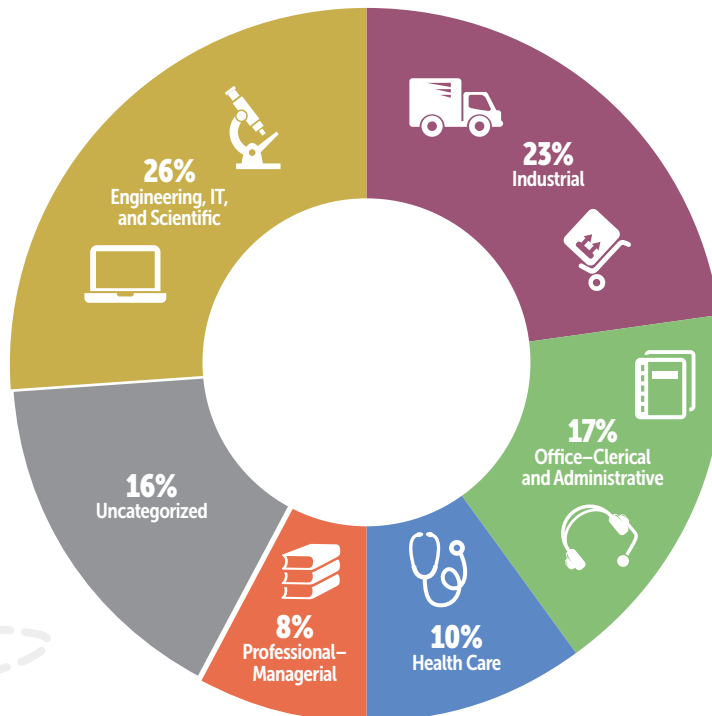
As with the economy overall, staffing and recruiting industry sales growth slowed in 2019. While temporary and contract staffing sales decreased in 2019, direct hire services increased. In fact, search and placement as a proportion of overall industry revenue has grown over the past decade. The economic crisis of 2020 will no doubt negatively impact staffing industry sales, although the depth of that effect will depend on policies, processes, and guidelines for getting the nation back to 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 U.S., there are about 25,000 staffing and recruiting companies, which altogether operate around 49,000 offices. Approximately 56% of companies and 76% 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.

About one-quarter of temporary staffing sales are in the engineering, information technology, and scientific sector (26%) and another quarter come from the industrial sector (23%) of the industry, according to the latest Census product line data. The remaining sales come from office-clerical and administrative, health care, professional-managerial, and other staffing services.

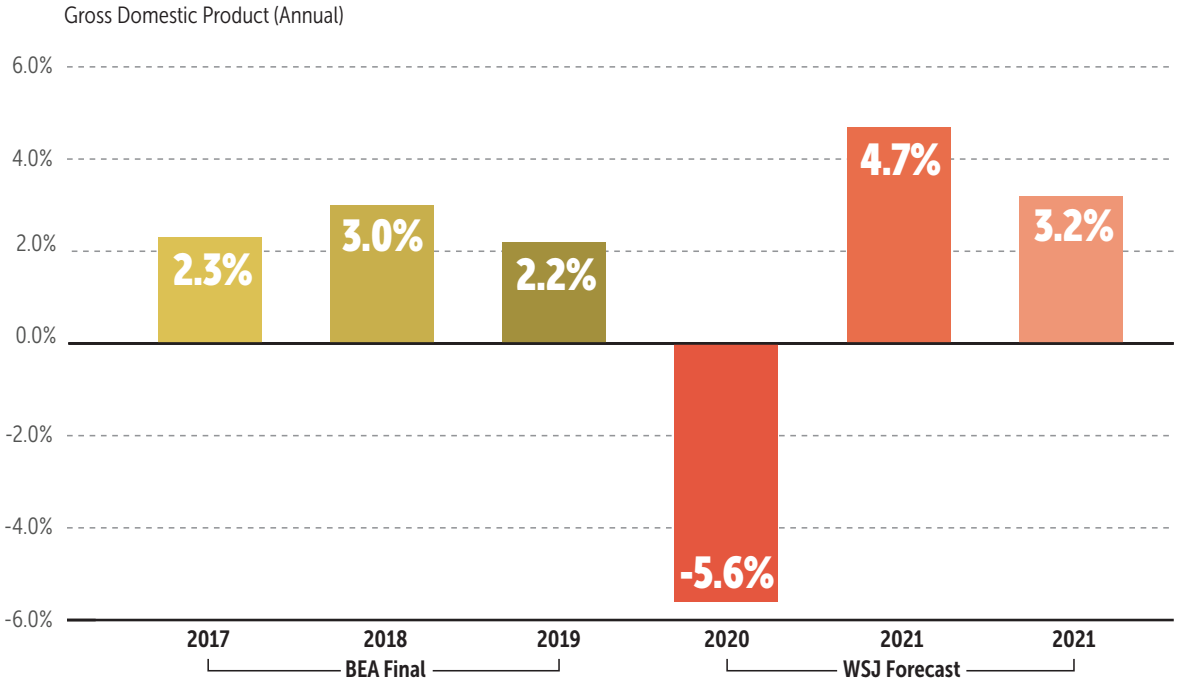
TAKE-AWAYS:

The staffing, recruiting, and workforce solutions industry makes a vital contribution to the U.S. economy, and provides job and career opportunities for 16 million employees per year, while servicing businesses across virtually all industries.

NOTES

FORECASTING ECONOMIC GROWTH

GDP GROWTH UNCERTAIN UNDER SHADOW OF 2020 ECONOMIC CRISIS



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

TRENDS:

Economic activity has been erratic over the past three years. The annual gross domestic product growth rate for 2017 was 2.3%, jumping to 3.0% in 2018, and back down to 2.2% at the end of 2019. The Crisis of 2020 has economists surveyed by the *Wall Street Journal* much less optimistic about how 2020 will end. Consensus projections for full-year GDP growth in 2020 sit at -5.6%. Economists expect the economic crisis to ease and GDP to rally next year, forecasting growth of 4.7% and 3.2% in 2021 and 2022 respectively.

TAKE-AWAYS:

Measuring and forecasting GDP is a precarious endeavor. When the economy is advancing, staffing industry growth outpaces GDP. Historically, including during 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 GROWTH TRACKS WITH GDP

PANDEMIC EFFECT ON STAFFING EMPLOYMENT



2.8 million **8.9%** [∨]

1Q20 staffing employment averaged 2.8 million per week; -8.9% year-to-year



70 **25.0%** [∨]

Staffing jobs -25.0% year-to-year, averaged over four weeks ended 7/19/2020



0.6% [∨]

New assignments -0.6% across 41% of staffing firms week-to-week

Source: American Staffing Association, Staffing Employment and Sales Survey, Staffing Index

TRENDS:

The ASA Staffing Index measures changes in staffing employment and provides real-time insight on economic health. The index fell 32.8% in the second quarter of 2020—tracking with the GDP contraction of 32.9%. The debate has been whether the nation has hit bottom in the Crisis of 2020 and what recovery will look like—the shape of a V, U, W, or some combination. For now, the index indicates that staffing job losses have stabilized and are on the rise.

Corroborating these findings are new ASA data on the number of new assignments in which staffing company temporary and contract employees have been placed. For the week ending July 19, four out of 10 staffing companies (41%) had a nominal decrease in staffing starts from the previous week (-0.6%), further evidence that recovery may be near-term.

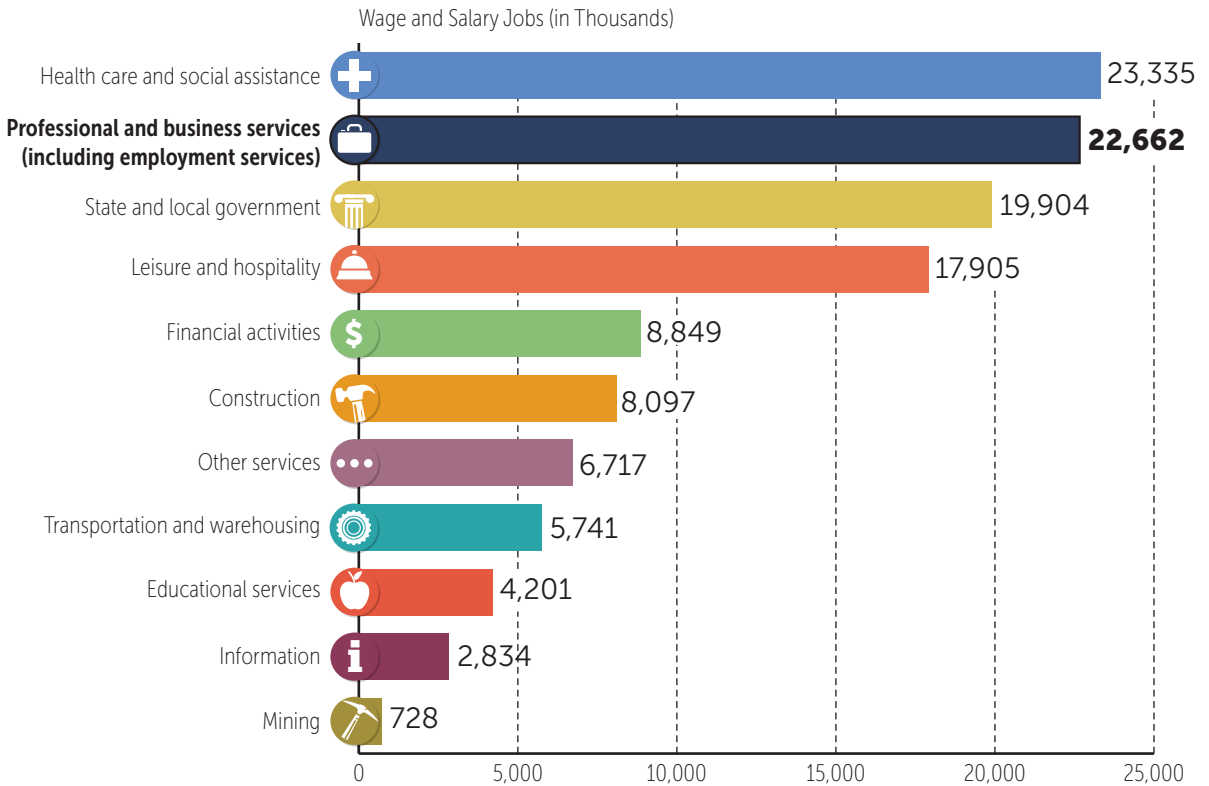
TAKE-AWAYS:

More data are needed to estimate where the industry is headed, but optimism among staffing companies is high, with 85% expecting their firm will be stronger by the start of Q4, based on data from ClearlyRated. While there's no crystal ball to help forecast the future, recent data point toward brighter days to come for the staffing industry and the temporary and contract workers they employ.

NOTES

EMPLOYMENT GROWTH BY INDUSTRY

TOP JOB-GROWTH SECTORS THROUGH 2028



Source: U.S. Bureau of Labor Statistics

TRENDS:

Prior to the pandemic, service-providing sectors were projected to add more than 7.6 million jobs—reaching 136.8 million—by 2028, according to the U.S. Bureau of Labor Statistics. This increase represents just over 91% of all new jobs anticipated to be created between 2018 and 2028. The health care and social assistance sector was predicted to drive more than four in 10 of the additional jobs, and the professional and business services sector (including **employment services**) is expected to be second in number of jobs created.






TAKE-AWAYS:

The biennial BLS employment projections were released toward the end of 2019 and do not account for the unforeseen pandemic and its effects on the economy—such as a recession, political conflicts, and changes in laws—but the agency saw steady growth ahead for employment services and the staffing industry. Learn more about the BLS employment projections in the article “8-Year Employment Outlook” in the March–April 2020 issue of *Staffing Success*.

NOTES

SECTOR GROWTH FACTORS

FASTEST GROWING SECTORS AND GROWTH FACTORS

SECTOR	ANNUAL GROWTH RATE	2028 JOBS ('000s)	JOBS ADDED 2018–2028 ('000s)	GROWTH FACTORS
 Health care and social assistance	1.6%	23,335	3,396	Aging population, longer life expectancies, and growing rates of chronic conditions
 Educational services	1.2%	4,201	687.7	Rising enrollments in postsecondary education
 Construction	1.1%	8,097	126.8	Above average increase in construction laborers and helpers
 Leisure and hospitality	0.9%	17,905	1,556	Increase in food preparation and serving related occupations
 Professional and business services (including employment services)	0.8%	22,662	1,662	Continued demand for computer systems design, consulting, and staffing services

Source: U.S. Bureau of Labor Statistics

TRENDS:

Growth factors for the five industry sectors expected to grow the fastest over the next decade include an aging population—which will likely contribute to an increasing number of chronic health conditions; rising enrollments in postsecondary education; an increase in construction laborers; more food preparation and serving-related jobs; and continued demand for computer systems design, consulting, and staffing services.

TAKE-AWAYS:

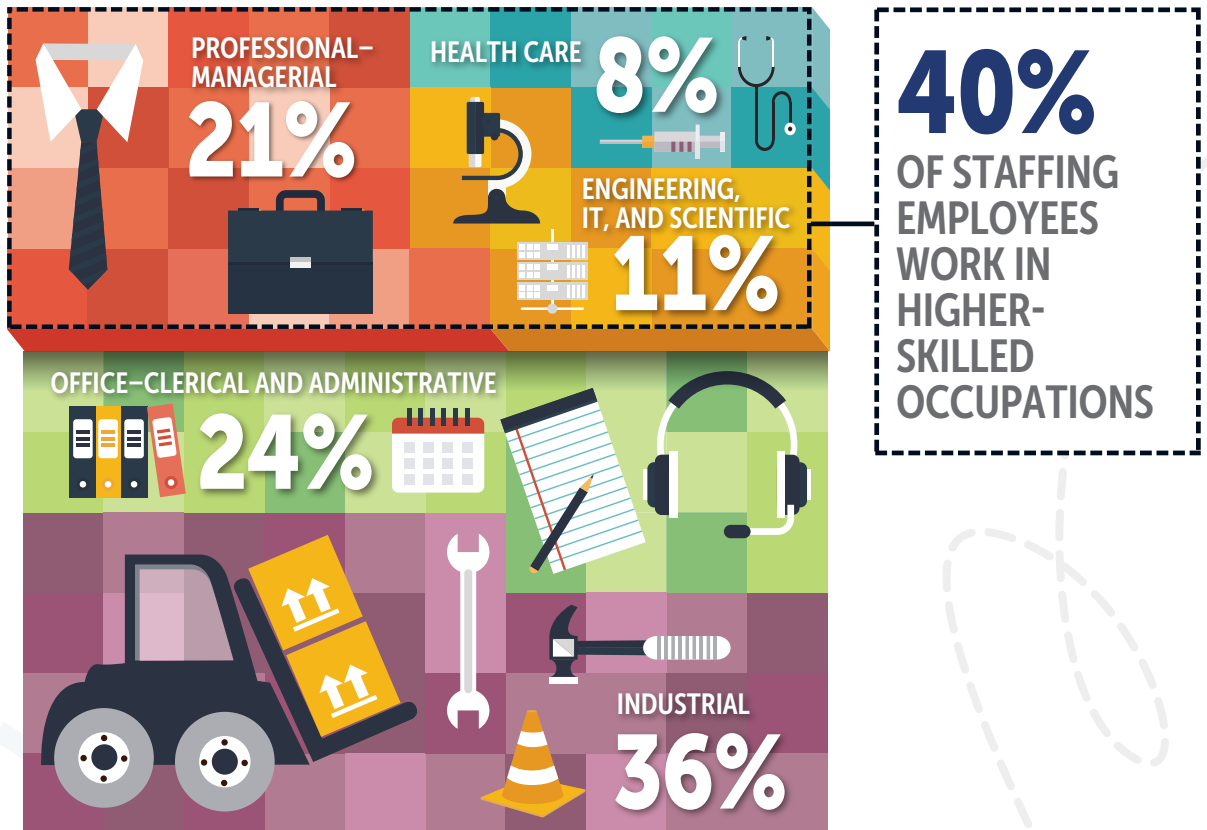
With the labor market in such flux, looking at the BLS data in the context of sectors is a must for strategic planning and business development. As health care expands and technological advances increase, there will continue to be temporary, contract, and permanent employment opportunities for job seekers 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 “8-Year Employment Outlook” in the March–April 2020 issue of *Staffing Success*.

NOTES

OCCUPATIONAL DISTRIBUTION OF STAFFING EMPLOYEES

TEMPORARY AND CONTRACT STAFFING ASSIGNMENTS SPAN VIRTUALLY ALL OCCUPATIONS

Staffing Employees by Sector (Percentage)



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.

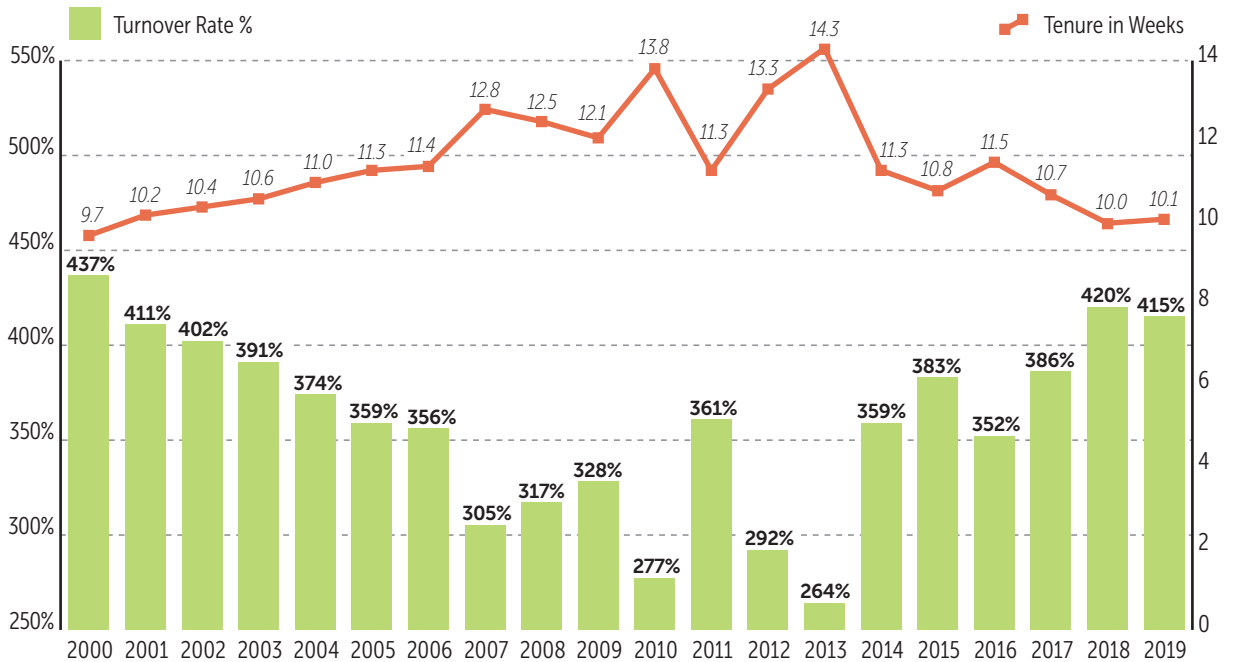
TAKE-AWAYS:

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 EDGED DOWN TO 415%;
TENURE REMAINED ON PAR



Source: American Staffing Association, Staffing Employment and Sales Survey

TRENDS:

The turnover rate for temporary and contract employees was 415% in 2019—down slightly from 420% in 2018. The average tenure for staffing employment was 10.1 weeks in 2019, on par with tenure in 2018. Tenure—the duration of employment—is inversely related to turnover: the shorter the tenure, the higher the turnover rate, and vice versa.

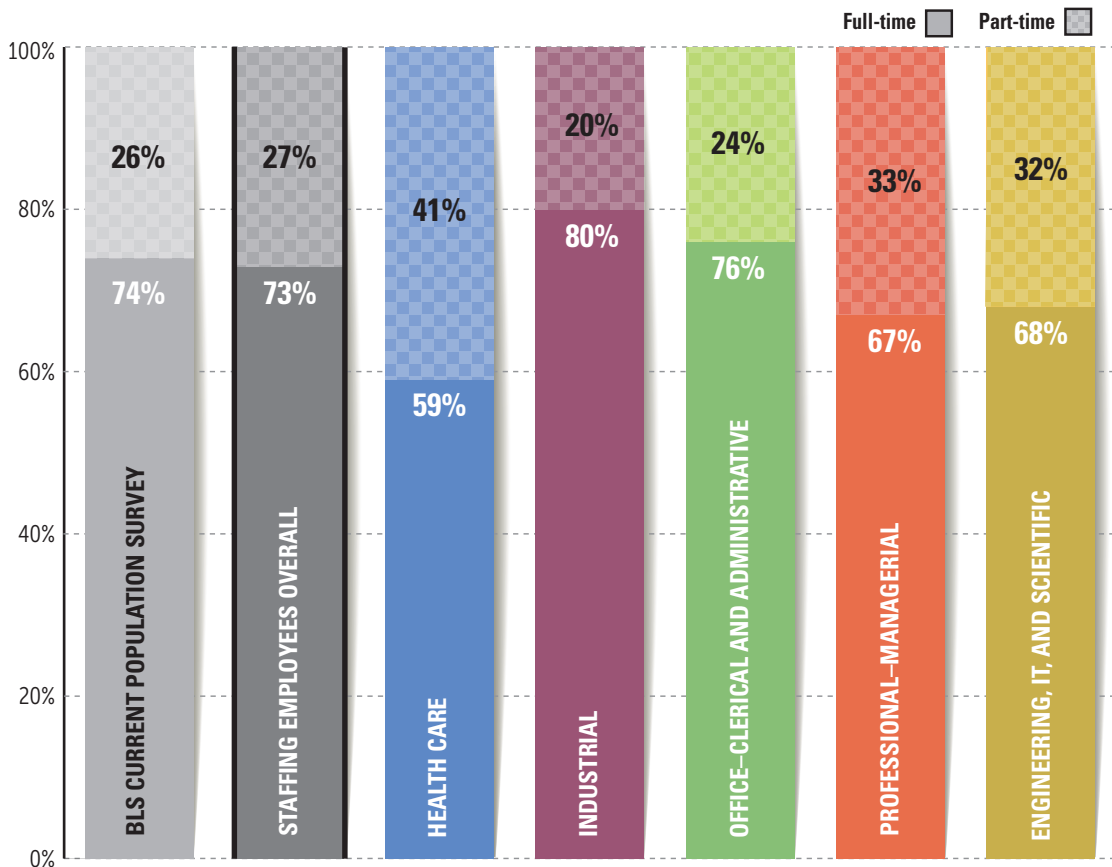
TAKE-AWAYS:

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 tenure was shorter; when average employee tenure is longer, the turnover rate decreases. 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:

Nearly three-quarters (73%) of staffing employees work full time (35 or more hours per week) and 74% of 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.

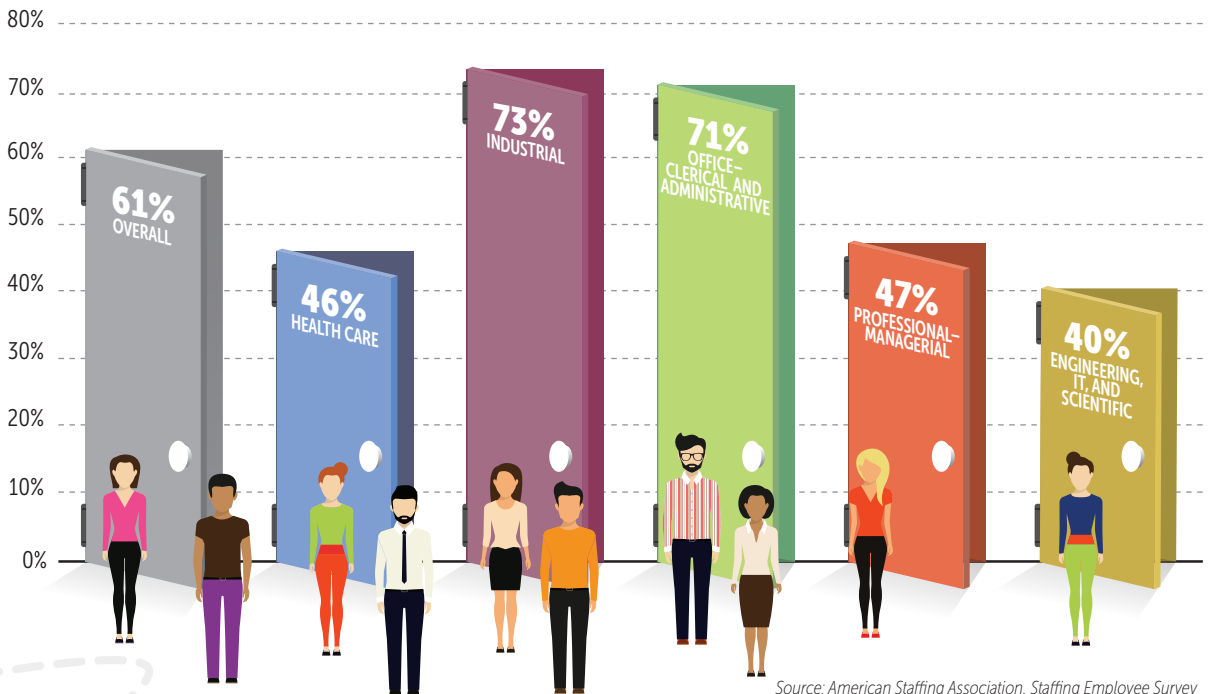
TAKE-AWAYS:

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



Source: American Staffing Association, Staffing Employee Survey

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:

The staffing industry is a bridge to permanent employment for millions of workers every year. Promote this fact to talent and you'll be tapping into one of the main factors motivating workers to turn to the staffing industry. See the *New Language of Staffing Handbook* for details on how to effectively communicate with job seekers.

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:

All of these findings from the latest ASA Staffing Employee Survey are powerful pieces of information to share with prospective talent. 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. >>>



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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.

This online training solution allows you to

- Provide the required training to your workers on your own company-branded platform
- 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



American Staffing Association



Go to americanstaffing.net/harassmentprevention for details.

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.



ASA
American Staffing Association



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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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American Staffing Association



A CLOSER LOOK AT ASA CORPORATE PARTNERS

In 2007, the American Staffing Association introduced a comprehensive corporate partnership program. ASA now has multiyear corporate partnerships with six companies: Bullhorn, CareerBuilder, ClearlyRated, Essential StaffCARE,

Monster, and World Wide Specialty Programs Inc.

The ASA corporate partnerships go beyond traditional sponsorships. They involve mutual commitments to long-term working relationships focused on



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.



CareerBuilder is a proud corporate partner of ASA, and it shares the association's commitment to promoting best practices for the staffing and recruiting industry.

CareerBuilder is a global technology company that provides end-to-end talent acquisition solutions to help employers find, hire, and onboard great talent, and to help job seekers build new skills and progressive careers. Visit hiring.careerbuilder.com to learn more.

ASA members can take advantage of dedicated industry research, data, and educational opportunities provided by CareerBuilder to help grow and differentiate their firms.



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 clearly-rated.com/solutions to learn more.

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.



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—a global leader in connecting people to job opportunities—is the flagship brand of Monster Worldwide Inc.

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 recruitment services empower companies to recruit more efficiently and effectively than ever before. By delivering a comprehensive set of managing, matching, and advertising solutions for the staffing industry, Monster offers custom solutions for companies of all sizes. It also gives companies access to Monster's extensive database of candidates and the full support of a dedicated staffing sales team



World Wide Specialty Programs Inc. offers a full range of insurance solutions for the staffing industry, from the simplest coverage needs to the most challenging risks. As an ASA partner with 50 years of experience, World Wide remains dedicated to the staffing industry's safety, growth, and everchanging challenges.

World Wide Specialty Programs' innovative custom insurance products and programs include staffing services liability, errors and omissions, general liability, property coverage, employment practices liability, directors' and officers' liability, commercial umbrella or excess liability, broad form fidelity bond, and workers' compensation.

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