



 Staffing Hub

# STATE *of* STAFFING

2022

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# EXECUTIVE SUMMARY

The staffing industry is booming! And the boom times are expected to continue. This year, more than one in five (21.5%) respondents to our survey said their agency grew 51% or more in 2021. Not only that, but nearly 80% expect double-digit growth this year.

To facilitate this growth, agencies are embracing the digital transformation. Almost 60% of our sample agreed that technology provides a competitive advantage, and respondents plan to increase their tech investment this year.

At the same time, the market is very tight, with more job openings than employed people.

Companies are keenly focused on building relationships and providing an excellent candidate experience. The ones that are growing the fastest are investing in tech to help them achieve these goals, such as mobile apps, chatbots, and automated referral management platforms.

This report digs into the challenges facing the staffing industry and the ways companies are tackling those challenges. We also have a couple of new features this year:

- **The Great Resignation** — We surveyed 583 members of the workforce about their plans to look for a new job.
- **Success factors** — We assessed several measures of staffing company success, including key performance metrics and ideal recruiter characteristics.

*Enjoy the 2022 State of Staffing report!*



# What does today's talent really want?

A single solution  
to do it all.  
Everything,  
anytime,  
anywhere.  
Right from their  
mobile device.



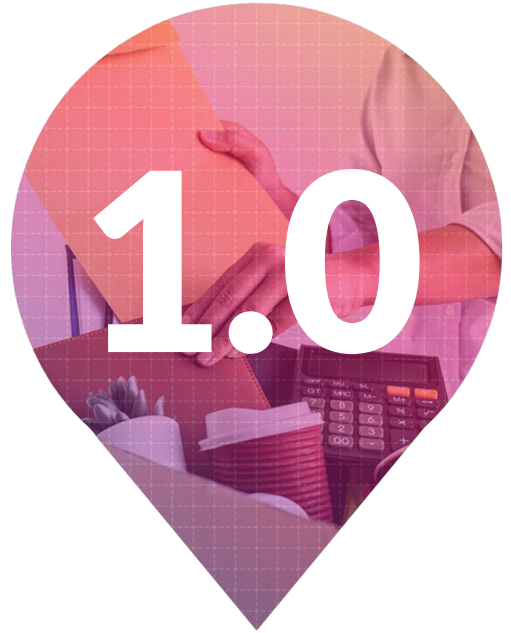
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**AVIONTÉ**  
Staffing & Recruiting Software

LEARN MORE





# THE GREAT RESIGNATION

1. Who Will Look for a New Job in 2022
2. Why People Are Changing Jobs
3. Where People Find Jobs



# SECTION OVERVIEW

## Summary

Whether it's a "Great Resignation" or a "Great Reshuffle," there's no question that people are leaving jobs at an exceptionally high rate. We asked 583 members of the general public whether they plan to switch jobs in 2022, why they would switch jobs, and where they plan to look.

### Key findings:

1. 46% of respondents plan to look for a new job this year
2. Higher pay is the top reason by far for switching jobs
3. Online job boards are the top place they plan to look for a new job

**"There are now  
more job openings  
than jobless people.  
It's a great time to be  
in the job market,  
and workers know it."**

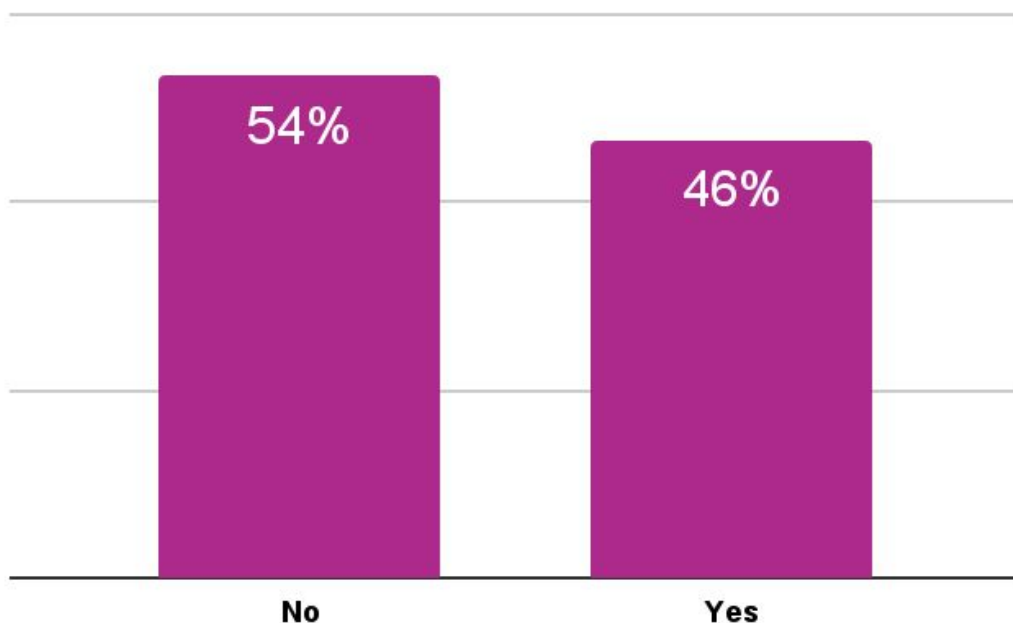
Krista Garver,  
Managing Editor, *Staffing Hub*

# Who Will Look for a New Job in 2022

Our survey respondents were drawn from a representative sample of the U.S. adult workforce. Overall, while there were some small differences across demographic groups, the results held steady regardless of how we segmented the data:

Nearly half (46%) of respondents plan to look for a new job this year.

## Do you plan to look for a new job this year?



There were some small differences across groups:

- Men are slightly more likely than women to look for a job (48% compared to 44%).
- Younger respondents are slightly more likely to look for a job than older respondents.
- People employed full-time or on a freelance bases are less likely to look for a job than people employed part-time or on a temporary basis.

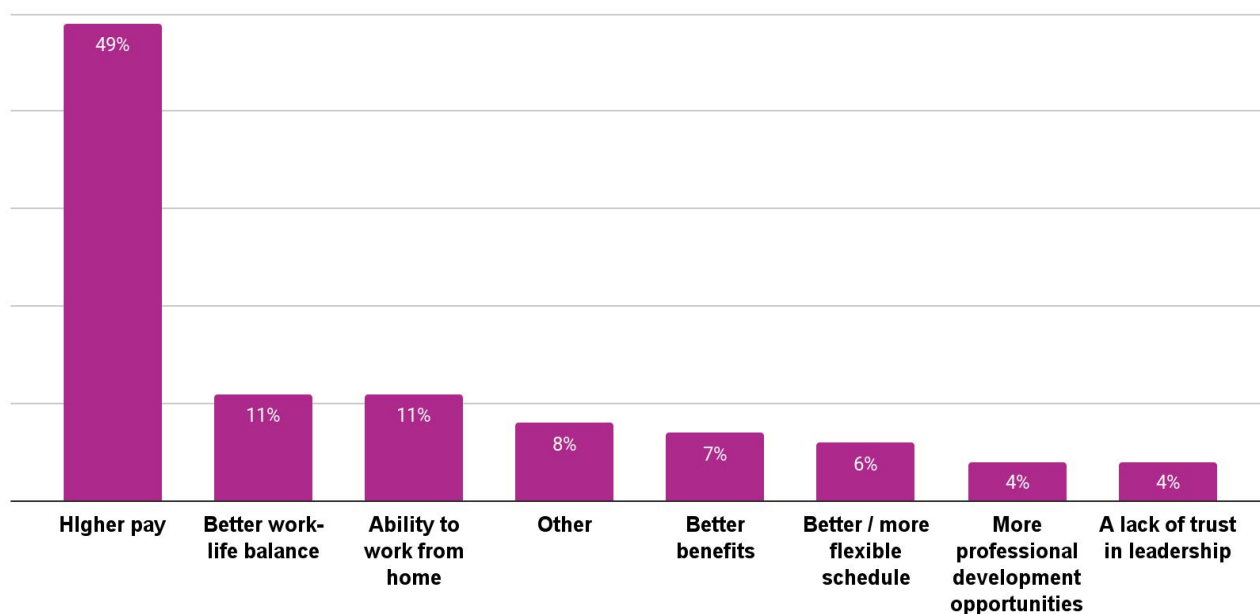


# Why People Are Changing Jobs

Across all demographics, higher pay is by far the most common reason people will look for a new job. Almost a full half (49%) of respondents cited this as their motivation.

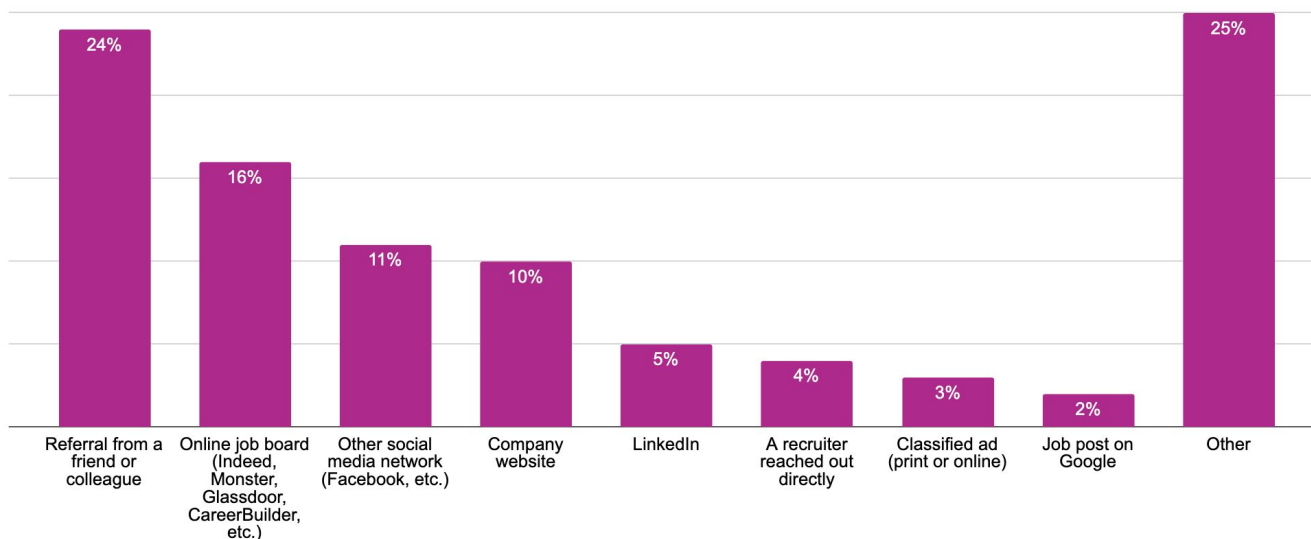


What's the top reason you would look for a new job?



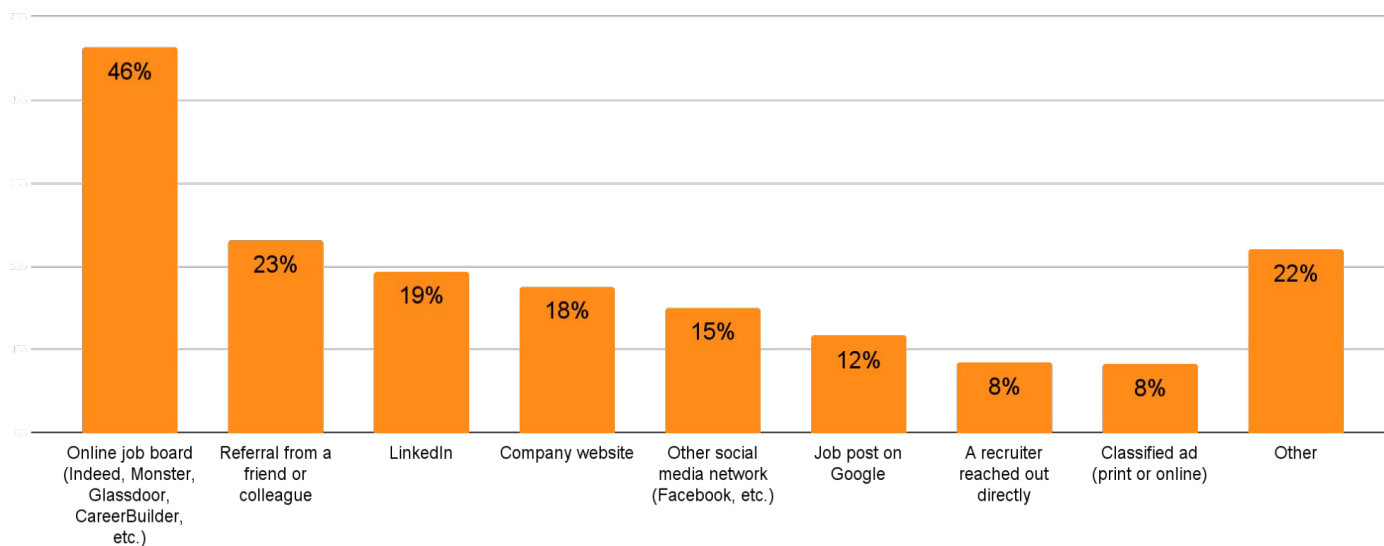
# Where People Find Jobs

How did you find your current job?



Referrals made up the largest single source where respondents found their current jobs. Almost one-quarter (24%) of respondents got their job through a referral, with online job boards following at 16%.

Where do you plan to look for your next job?



Nearly half of respondents (46%) plan to look for their next job on job boards. Referrals are second — 23% expect to get a job this way.



# STATE OF STAFFING

1. Who Took the Survey
2. Staffing Industry Growth
3. 2021 Actual Growth by Vertical
4. 2022 Growth Projections by Vertical





# SECTION OVERVIEW

## Summary

The staffing industry experienced incredible growth in 2021. More than one in five (21.5%) respondents said their firm grew by more than 50%, and many more than doubled.

Industry leaders are optimistic that this growth will continue. Almost eight in 10 (78.6%) respondents expect their agencies to see double-digit growth this year. That's the highest since we started conducting this survey in 2016.

In 2021, the IT market in particular took off, likely fueled by the shift toward working from home. This year, the industrial vertical is expected to skyrocket: 93% of industrial respondents in our sample predict growth of 51% or more for the year.

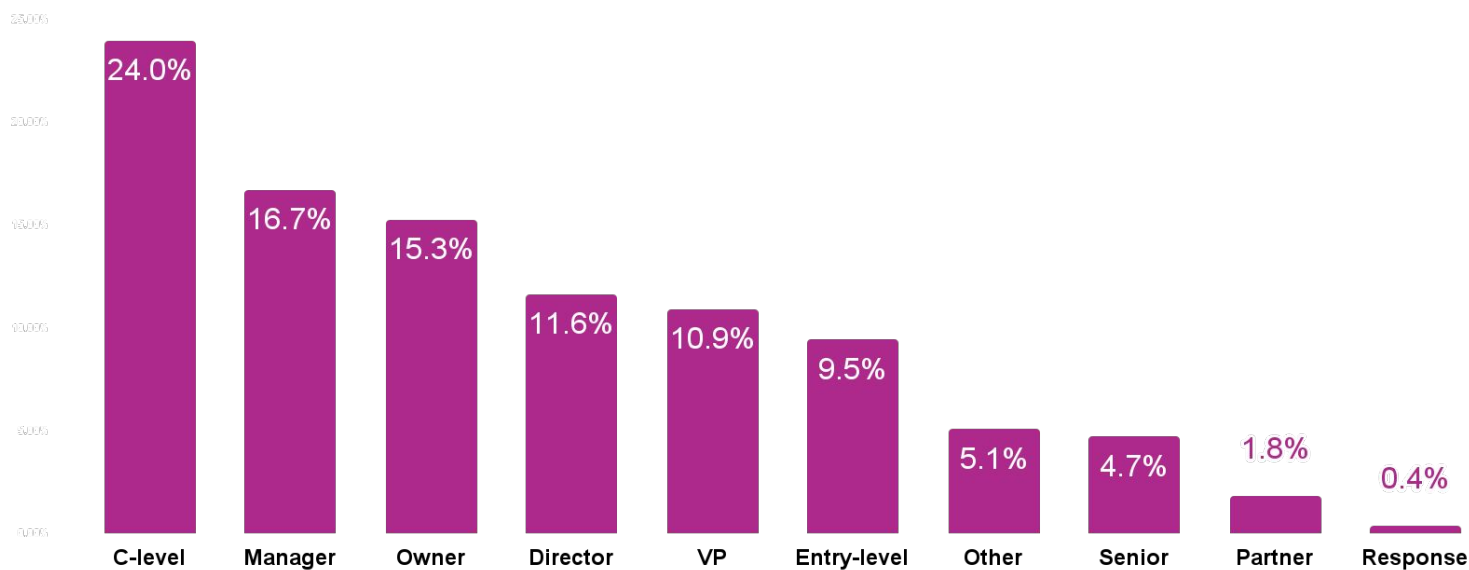
**"The market is the best  
I've seen in 10 years."**

Survey Response

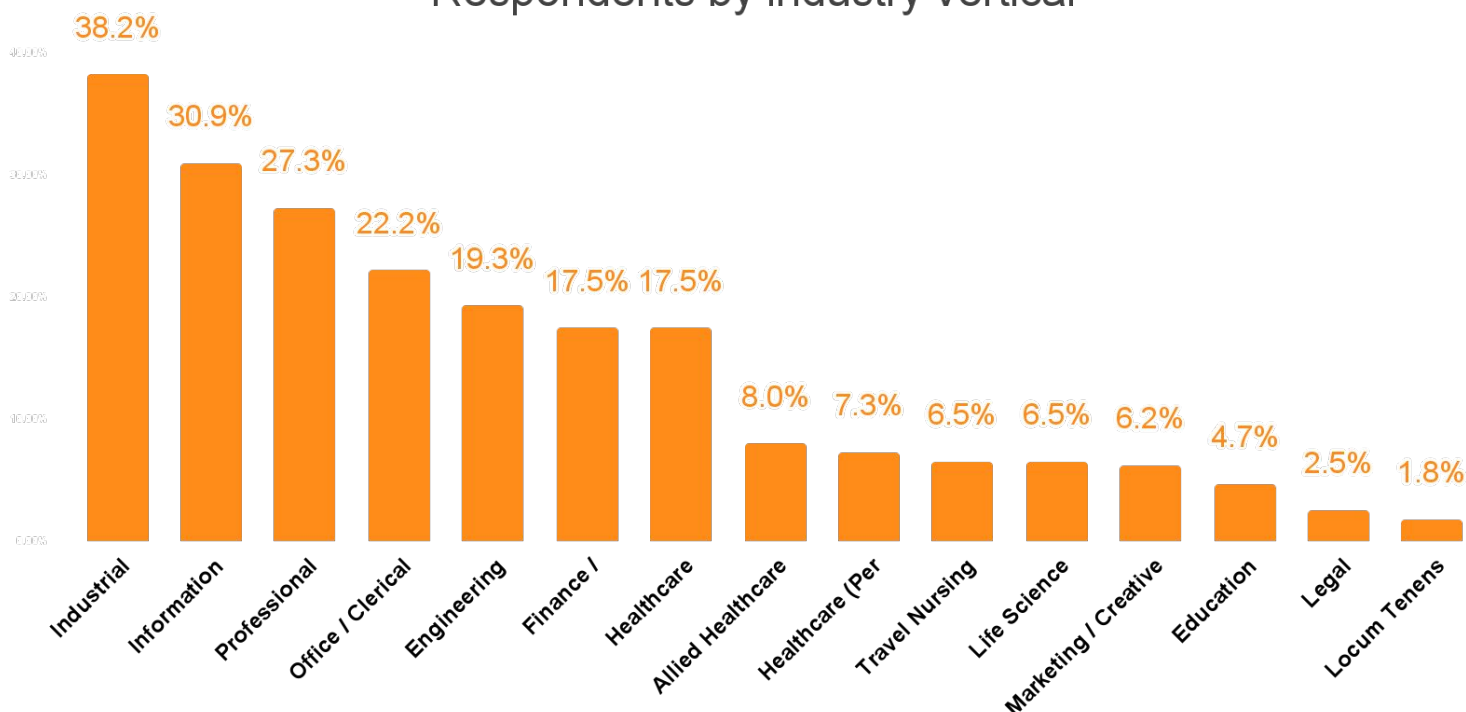
# Who Took the Survey

275 staffing professionals across all verticals completed our survey.  
More than half of respondents were owners, management, or C-Level.

## Job function of survey respondents



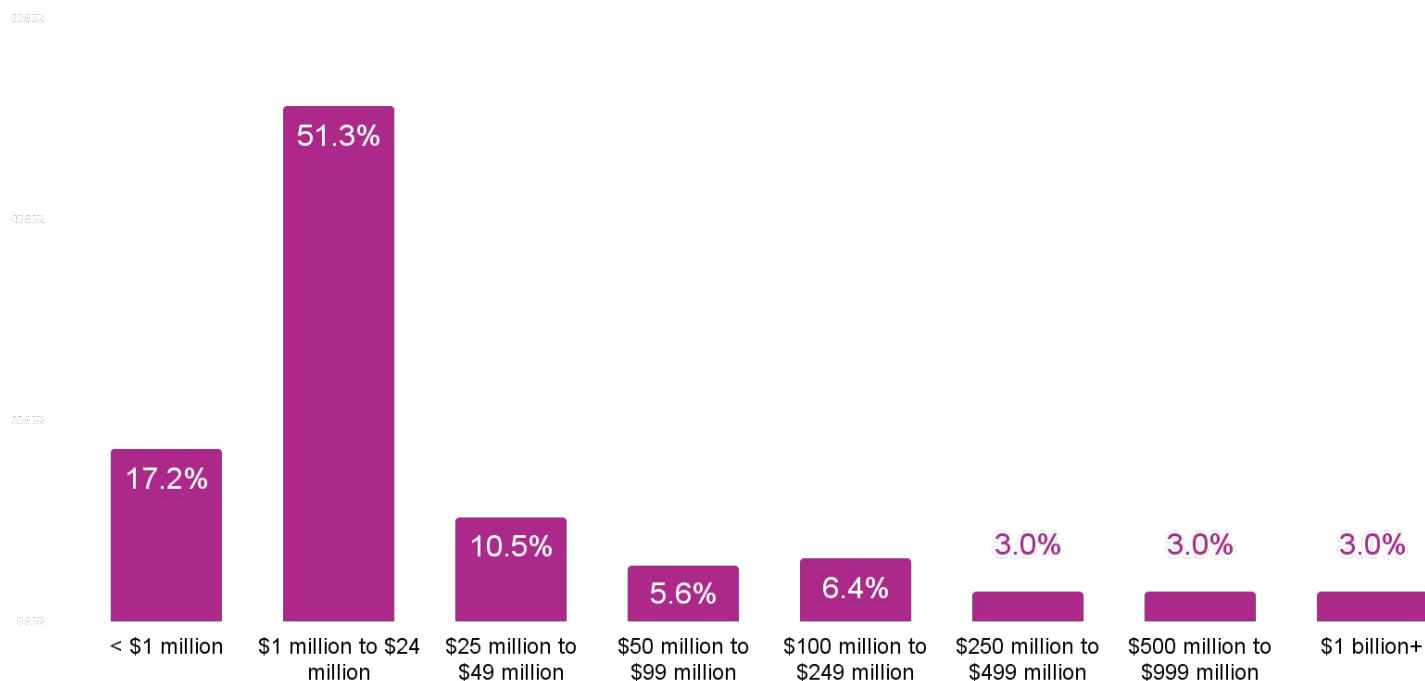
## Respondents by industry vertical



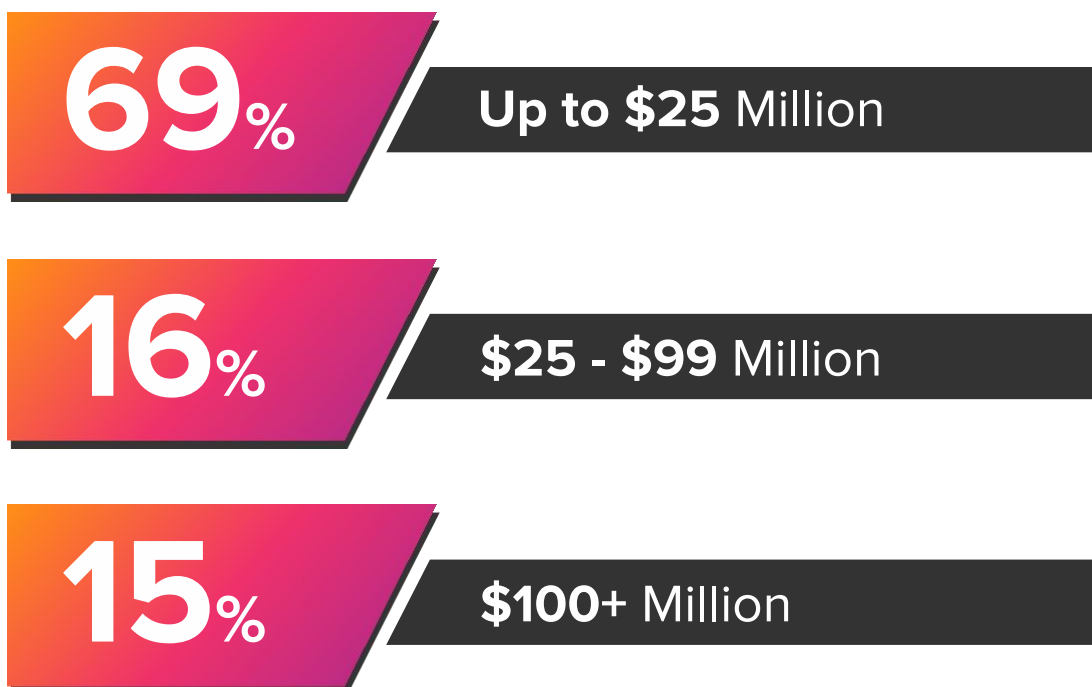
# Who Took the Survey: Company Size

Staffing firms of all sizes were represented in the survey.

Respondents by annual revenue



## Summary of Agency Size





# What to Expect in This Report

Every year, we segment our data to make sure we're delivering real insights that help you improve your business strategy. Since we first started producing this report, we've categorized responses based on their reported year-over-year growth: fast (21% or more), moderate (11-20%), and slow (10% or less).

In 2021, the industry grew so much that these categories were no longer meaningful. So, for this report, we've redefined them. Fast-growth is defined as 51% or more YoY; moderate-growth, 11-50%; and slow-growth, 10% or less.

**In this report, you'll learn how fast-growth agencies operate compared to slow-growth firms.**



**21.5%**

Fast growth in 2021  
**51%**  
or more YoY



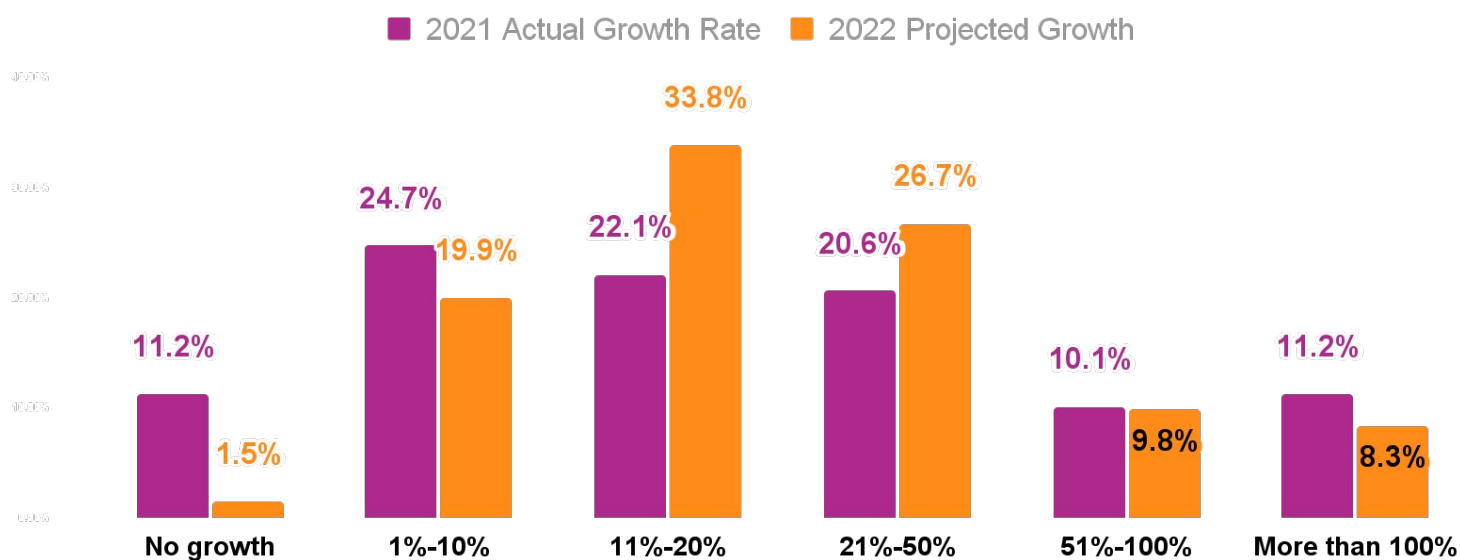
**35.8%**

Slow growth in 2021  
**10%**  
or less YoY

# Staffing Industry Growth

Industry leaders are optimistic about the future, with 78.6% of firms expecting double-digit growth in 2021.

## Staffing agency revenue growth: 2021 actual vs 2022 projected



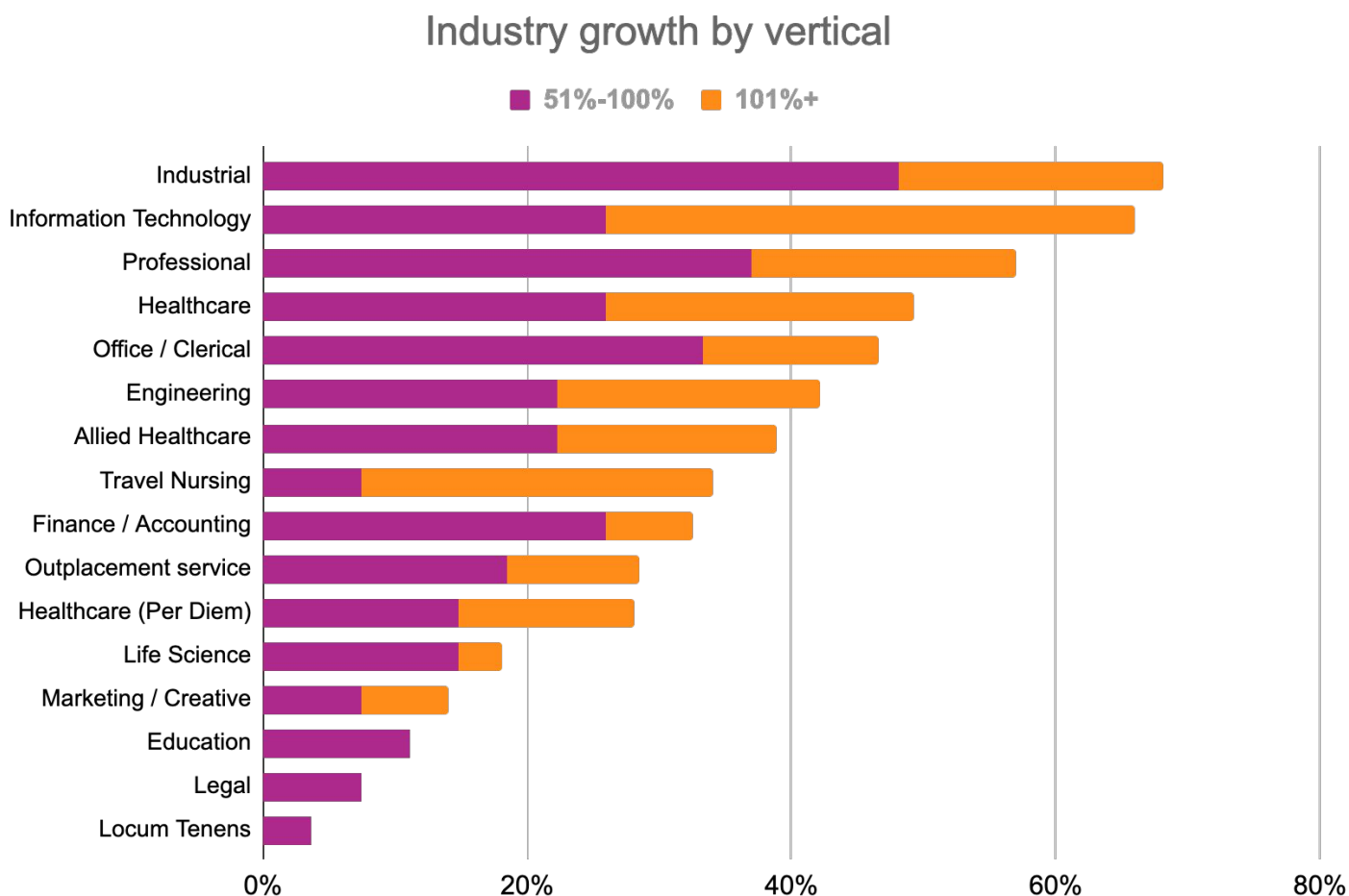
2021 was better than 2020 for the staffing industry, and the positive trajectory is expected to continue this year.

In 2020, 36.7% of our survey respondents reported no growth. That number declined to 11.2% for 2021, and, this year, only 1.5% don't expect to grow at all.

On the other end of the spectrum, 78.6% of respondents expect their agencies to grow by 11% or more in 2022. That's up from 69.6% last year.

# 2021 Actual Growth by Vertical

Many agencies grew by 51% or more in 2021. More than half of respondents in the Healthcare (Per Diem), IT, and Legal industries, reported greater than 50% growth.



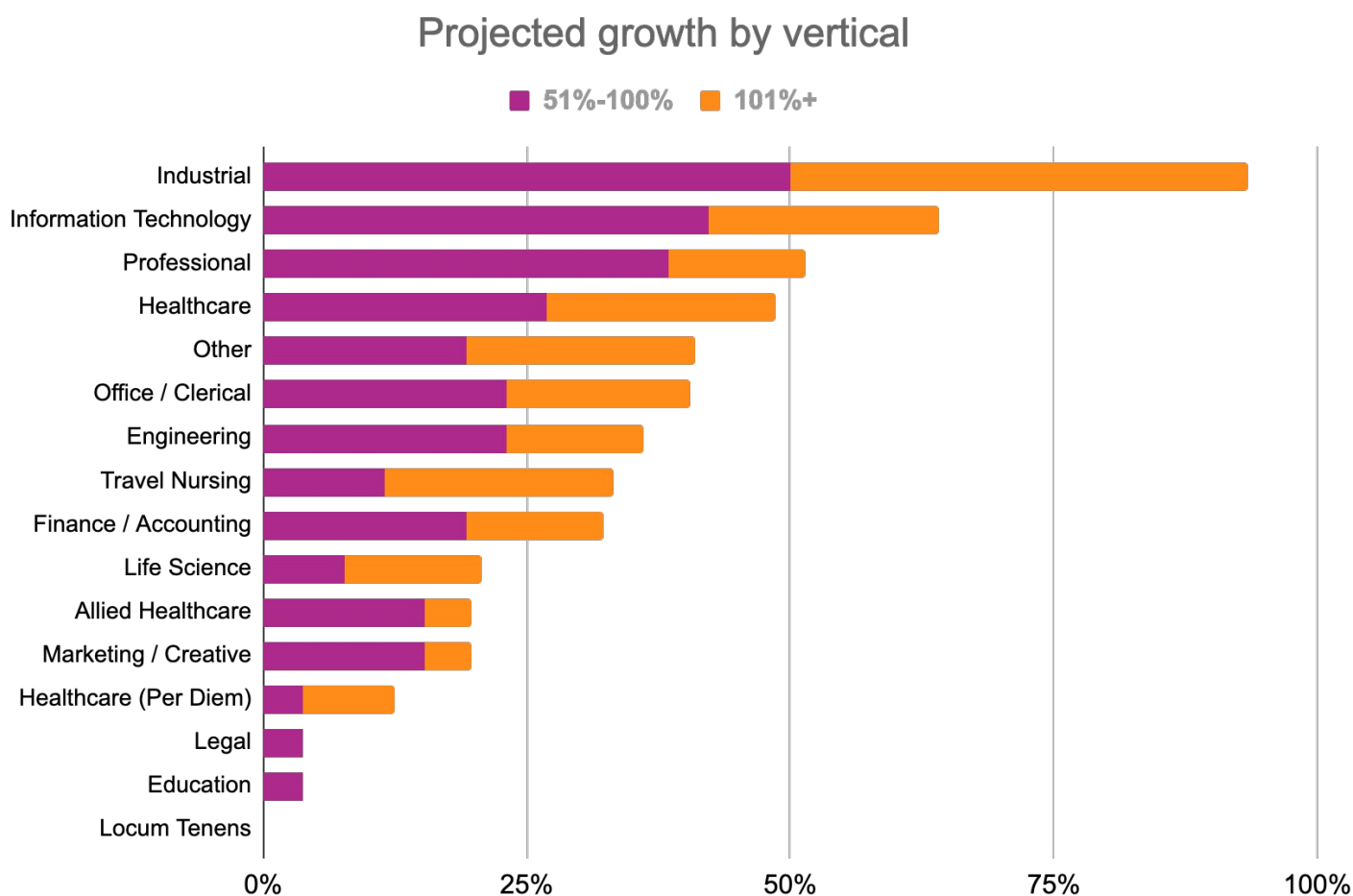
**"The IT market is crazy - capitalize on the opportunity. Especially with remote work being acceptable, it opens up borders and widens the candidate pool to select qualified candidates to meet the client's expectations."**

Survey Response



# 2022 Projected Growth by Vertical

This year, agencies in IT, Professional, and Industrial staffing expect to see the largest growth. Across verticals, industrial is the most positive, with 93% of respondents predicting growth of 51% or more.



**"I believe business has finally come to accept the necessity of staffing support."**

Survey Response

# Meet the Moment.

Every moment presents an opportunity, and the present moment **demands action.**

## HISTORIC TALENT SHORTAGE

# 4,000

**Global Staffing Pros Have Spoken**

Talent Shortage is the #1 Challenge and Talent Acquisition is the #1 Priority

## EVOLVING CANDIDATE EXPECTATIONS

# 90%

**Of talent wish**

the process of finding jobs through staffing firms was more streamlined

## FIERCE COMPETITION

# 61%

**Of freelance workers prefer**

to work with staffing firms, but 90% say working with online talent platforms is easier

Give your teams the digital leverage to supercharge their efforts, create a better talent experience, and exceed client expectations.

*Learn how your business can digitally transform and Meet the Moment in 2022.*

**#MeetTheMoment**

[bullhorn.com/meet-the-moment](https://bullhorn.com/meet-the-moment)





# CHALLENGES OPPORTUNITIES AND NPS

1. Top Challenges for Agencies
2. Finding New Candidates
3. Finding New Clients
4. Biggest Opportunities
5. Net Promoter Score



# SECTION OVERVIEW

## Summary

Finding qualified candidates remains the top challenge in the staffing industry. This has been true since we started conducting this survey in 2016.

But how firms are solving this challenge has changed. Until 2020, LinkedIn and Indeed were rated as the most effective lead source. In our 2021 report and again this year, referrals and direct sourcing held the top two spots. This fits with the data from our workforce survey where a plurality of respondents said they got their current job via a referral from a friend or colleague.

Positive reviews, as measured by Net Promoter Score, continue to be critical for staffing agencies. This is also an area where slow-growth firms lag behind the industry as a whole.

**"People are extra hard to hire these days. Companies need agencies to make it easier."**

Survey Response



# Top Challenges for Agencies

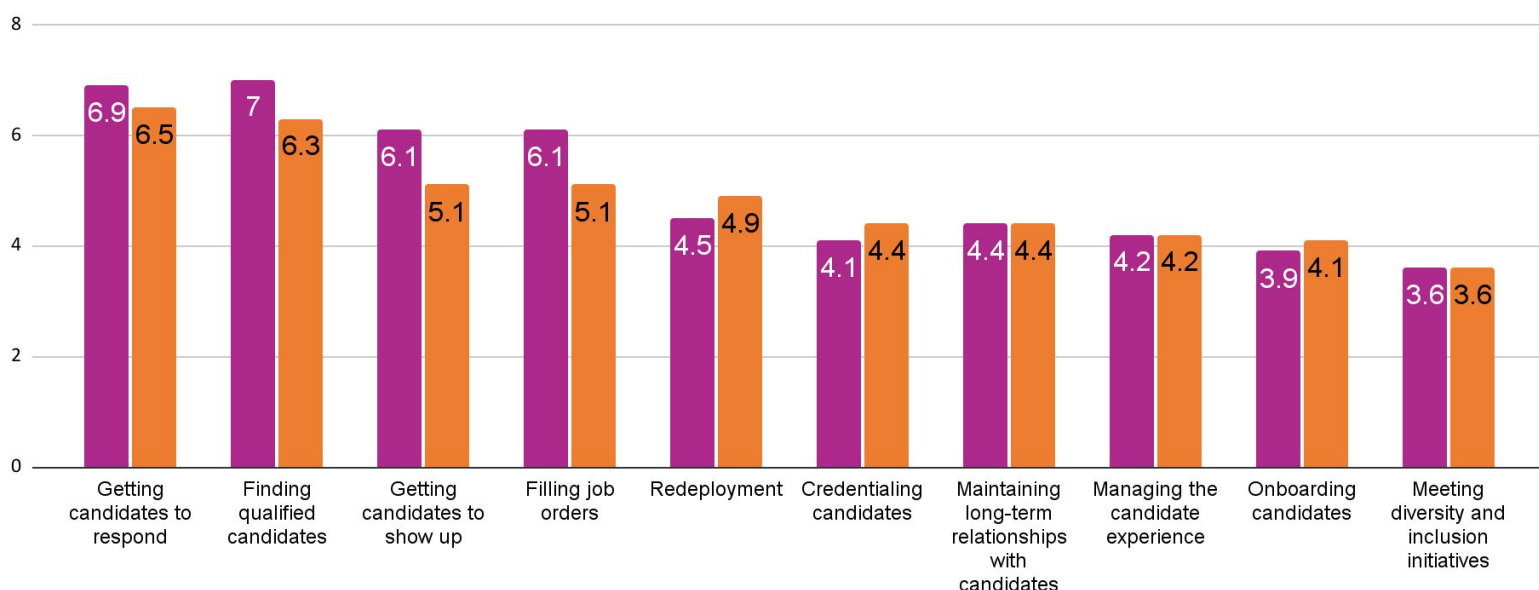
Finding qualified candidates and getting candidates to respond have been the top two challenges across the board since we started conducting this survey.

While there was no difference between growth categories for most of the challenges we assessed, slow-growth agencies find it somewhat more difficult to find qualified candidates, get candidates to show up, and fill job orders.



How challenging are these recruiting activities for your organization?  
(1 = Extremely challenging, 5 = Not at all challenging)

■ Slow growth ■ Fast growth



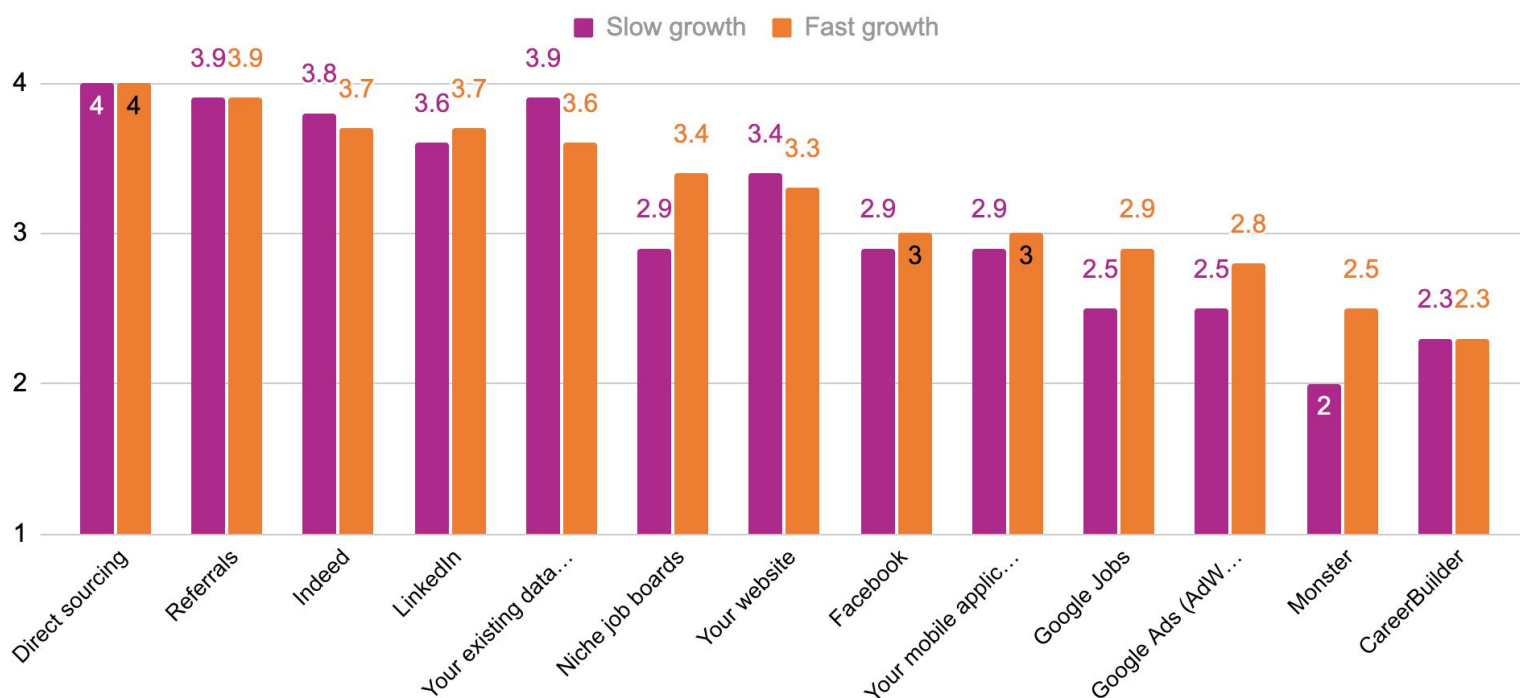


# Finding New Candidates

**Direct sourcing** and **referrals** continue to be the most effective lead sources for finding new candidates across all agencies.

Fast-growth firms are more effective than slow-growth firms at using several sourcing platforms, including Monster, niche job boards, and Google Jobs. Slow-growth firms tend to rely more on their existing database.

How effective are the following sources for finding new candidates?  
(1 = Very poor, 5 = Excellent)



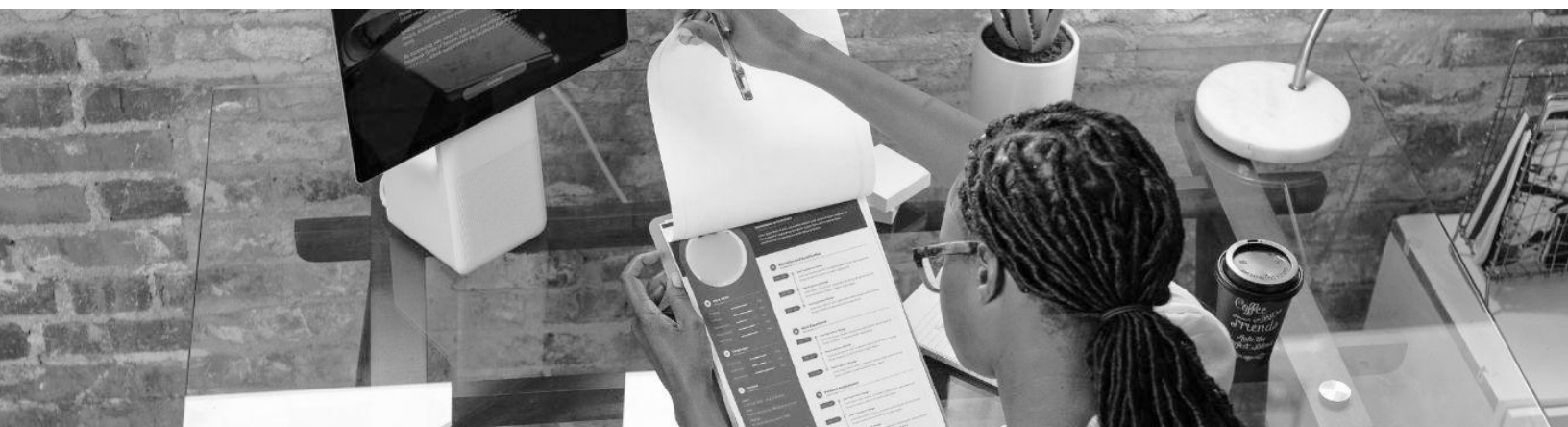
**"You have to be patient and diligent.  
Constantly re-evaluate where you are looking for  
candidates and how you are trying to reach them.  
Get creative."**

Survey Response

# Finding New Clients

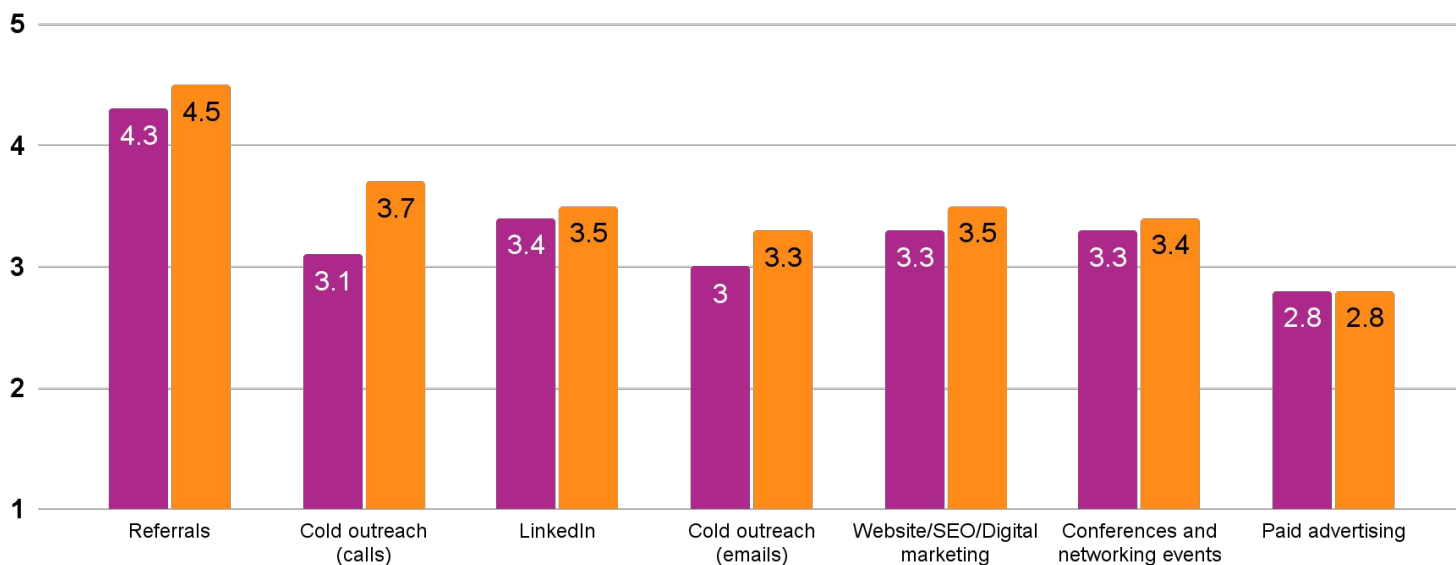
Referrals were also rated as the top source for finding new clients, well ahead of all other sources. Not surprisingly, fast-growth firms rate all sources as more effective than slow-growth firms, except paid advertising, which both groups view as the least effective method of finding new business.

The biggest difference is in cold calling, which fast-growth firms rated second-highest and slow-growth firms rated near the bottom. This suggests fast-growth firms have developed more effective strategies for outreach.



How effective are the following sources for finding new clients?  
(1 = Very poor, 5 = Excellent)

■ Slow growth ■ Fast growth



# Biggest Opportunities

In addition to technology and automation, which were the top opportunities in last year's report, providing an excellent employee and candidate experience and owning a niche space in the market emerged as two major ways staffing agencies can succeed in the current tight labor market.

## Here are a few of the highlights:

**Own your niche, focus on quality job orders,  
"less is more." Know your numbers and capacity.  
If you don't, you will drown.**

**Managing and retaining  
our office culture**

**New high-tech  
competitors**

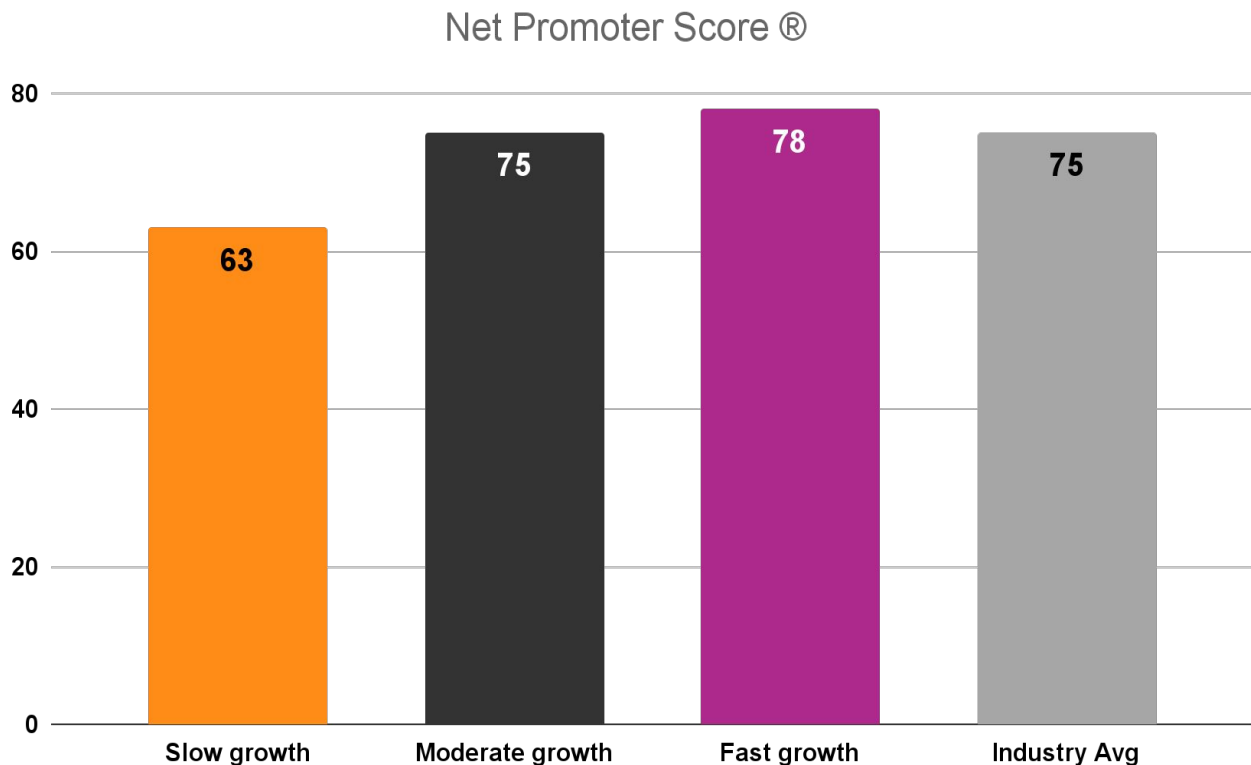
**Retaining top talent. Lifting employee morale.  
Providing competitive compensation.**

**Finding good recruiters and account managers  
to drive business growth.**

**Finding people who want to work.**

# Net Promoter Score ®

The average NPS for agencies shot up since our last report, when agencies reported an industry average of 56. Today, a high NPS is table stakes, though slow-growth agencies continue to lag behind the industry average.



**"Recognize the difference you are making  
in people's lives — remind yourself  
of the 'why.' "**

Survey Response



# Source, engage, and place qualified candidates faster

Extend your reach with Staffing Referrals



*"From a pure ROI standpoint, we've generated a 40:1 ratio after the first year with Staffing Referrals."*


Jim Yoshimura  
Vice President of Operations, ACS Solutions

Trusted by leading agencies:



Start Getting More Referrals →





# 4.0

# THE DIGITAL TRANSFORMATION

1. Attitudes Toward Technology
2. What's New in the Staffing Tech Stack
3. Challenges of Technology
4. Most Valuable Technologies
5. Staffing Software Market Leaders
6. Monthly Job Board Spend
7. Tech Spend and Planned Implementations



# SECTION OVERVIEW

## Summary

Over the years we have been producing this report, the staffing industry has changed its attitude toward technology. Even just one year ago, most agencies did not see technology as providing a competitive advantage. Today, a majority of companies see the value of technology, and many believe recruiting automation will transform the industry.

While an ATS is considered the most valuable technology, several others are seeing increased adoption, particularly among fast-growth firms. Compared to slow-growth agencies, fast-growth agencies are:

- 109% more likely to use a chatbot
- 88% more likely to use automated referral management (ARM)
- 54% more likely to use a mobile app

**"The more automation we implement, the more staff we can add. Candidates are everywhere - we need the manpower and automation to be as efficient as possible."**

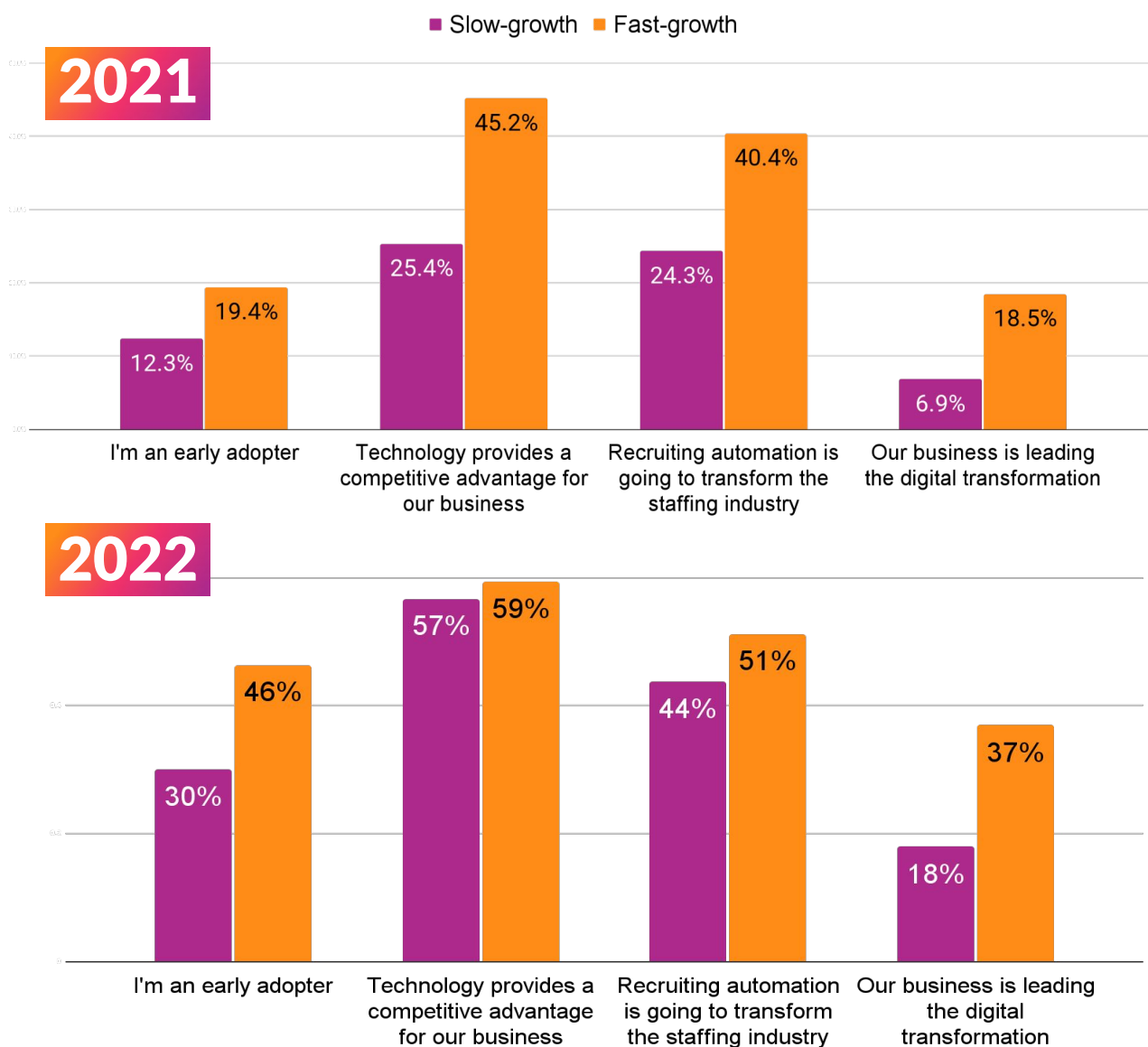
Survey Response

# Attitudes Toward Technology

The pandemic and the resulting tight labor market have changed many agencies' approach to technology.

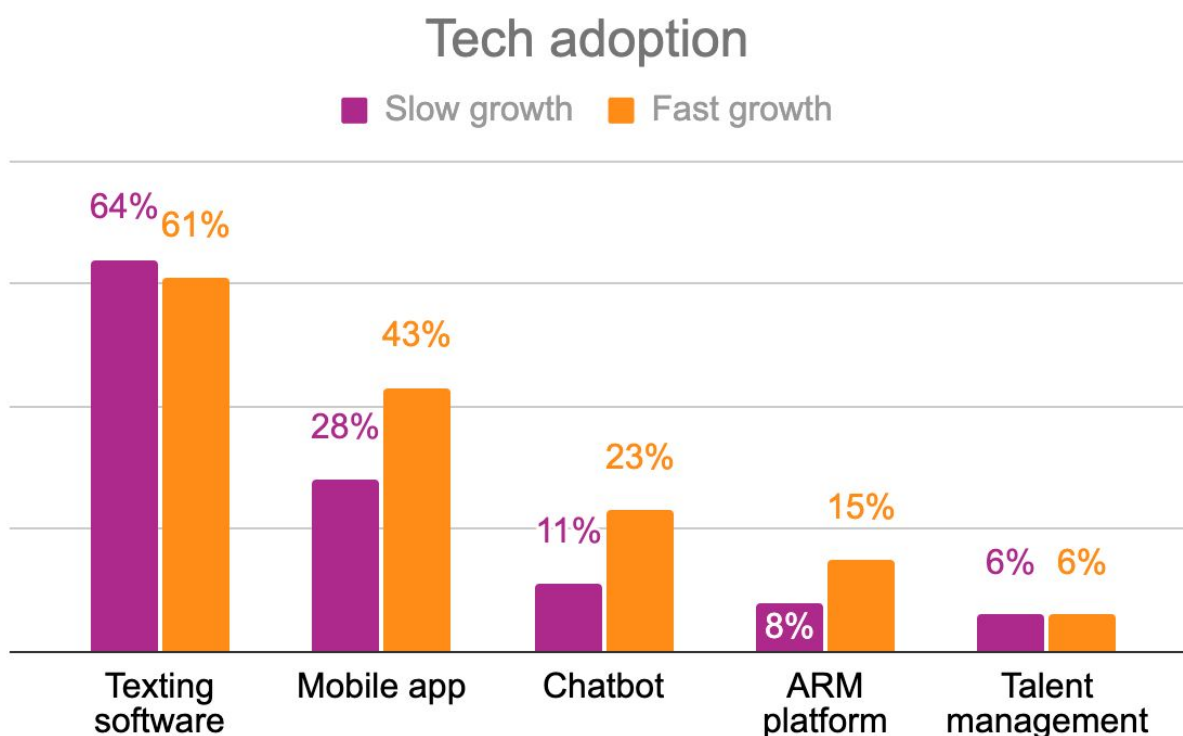
In 2021, 45% of fast-growth agencies said technology provides a competitive advantage for their business, compared to just 25% of slow-growth agencies. This year, nearly 60% of all respondents strongly agreed with this statement. There are still large difference between fast- and slow-growth agencies when it comes to early adoption and the digital transformation.

Percent of agencies that strongly agree with the following statements



# What's New in the Staffing Tech Stack

Texting software has almost become industry standard — more than 60% of respondents have a texting platform in their tech stack. Fast-growth agencies are much more likely to have implemented automated referral management, chatbots, and mobile apps than slow-growth companies. Only a small percentage of firms are using talent management platforms like Upwork and Freelancer.com to source new candidates.



Fast-growth agencies have more tools in their tech stack than slow-growth agencies:

- 109% more likely to use a chatbot
- 88% more likely to use automated referral management (ARM)
- 54% more likely to use a mobile app

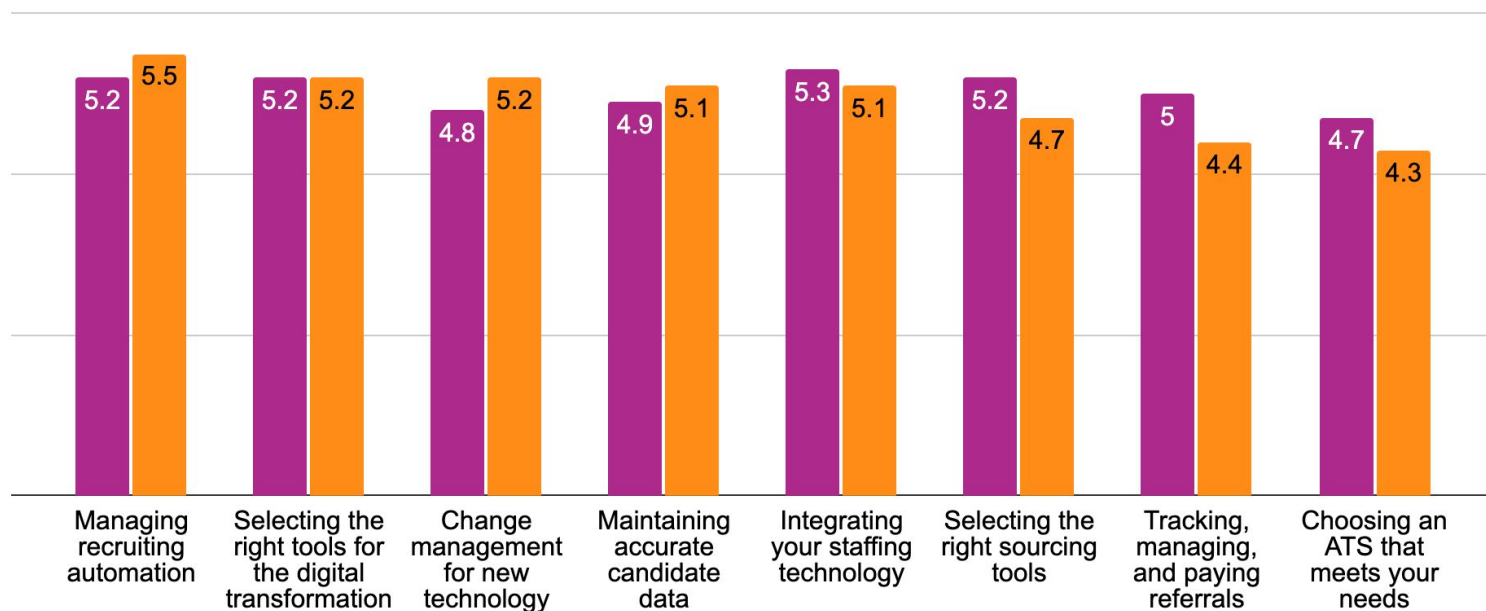
# Challenges of Technology

“Managing recruiting automation,” “selecting the right tools for the digital transformation,” and “integrating your staffing technology” are the top challenges of technology.

However, firms aren’t having too much trouble with any of the challenges we assessed. On a scale of 1 (not challenging at all) to 10 (extremely challenging), all of the challenges were rated close to neutral.

How challenging are the following technology initiatives?

■ Slow growth ■ Fast growth



**"Evaluate every facet of a tool before making a purchase decision."**

Survey Response





# MOST VALUABLE TECHNOLOGY

Last year, Bullhorn, LinkedIn, and MS Teams were rated as the most valuable software overall. This year, all three top spots were taken by an ATS, with LinkedIn tied for Avionté for third.



## Most Valuable Technology

1. Bullhorn
2. Tracker
3. Avionté and LinkedIn (tied)



## Most Valuable Sourcing Platform

1. LinkedIn
2. Indeed
3. LinkedIn Recruiter



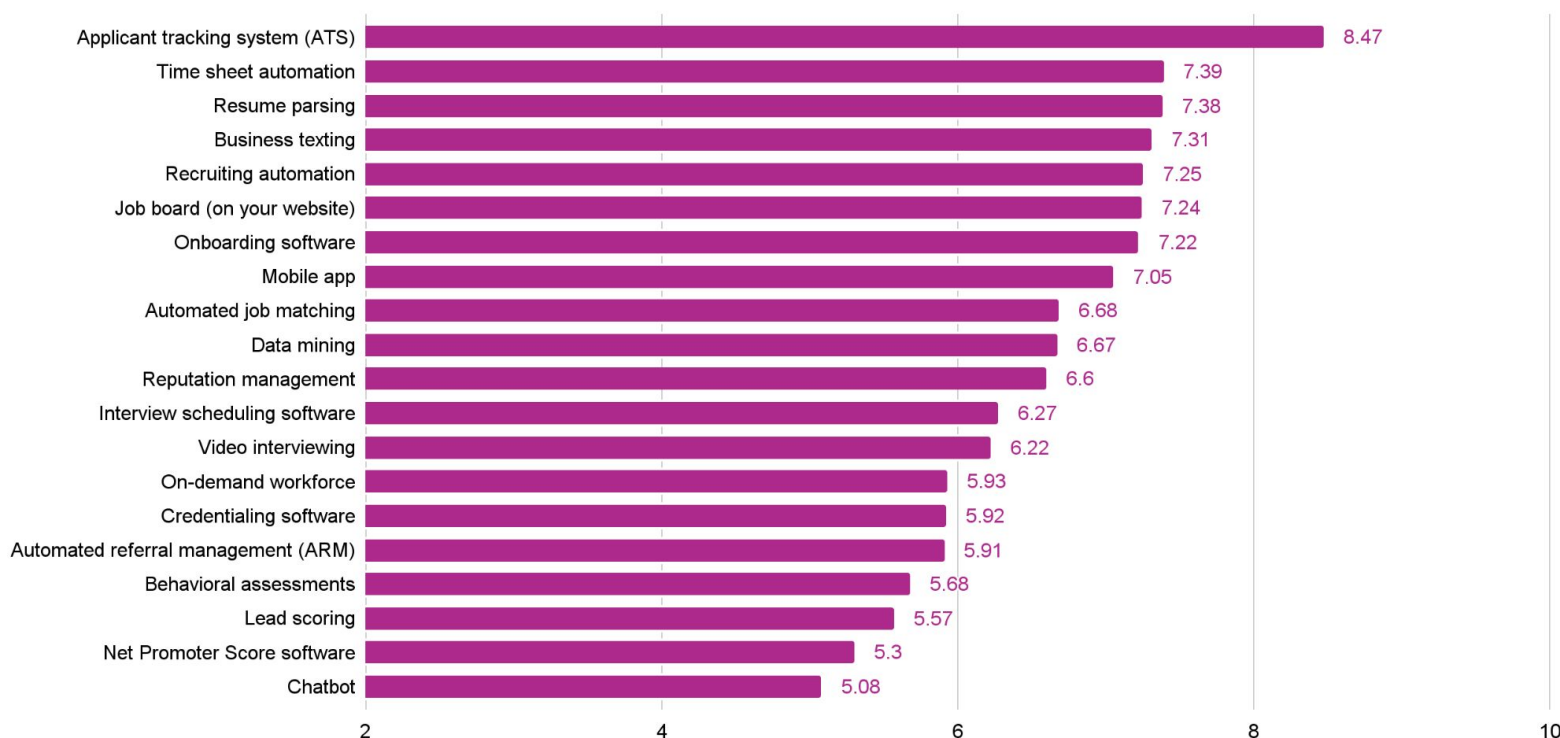
## Most Valuable Automation Platform

1. Sense
2. Bullhorn
3. Tracker

# Most Valuable Technology

Overall, respondents rated their applicant tracking system (ATS) as the most valuable staffing software solution. Timesheet automation, resume parsing, business texting, recruiting automation, job boards, and onboarding software were all essentially tied for second.

How valuable are the following staffing software solutions for the success of your business?



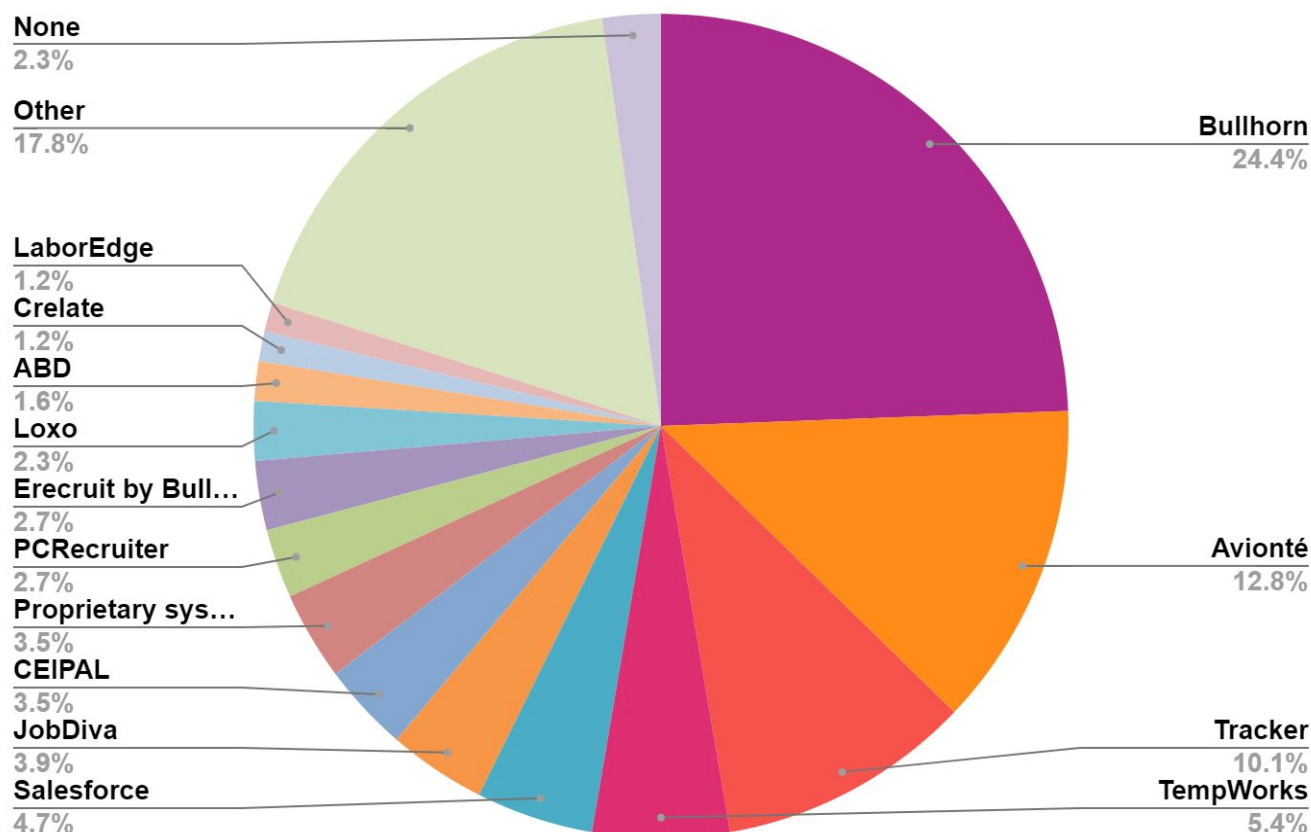
What is the biggest opportunity for driving growth for staffing agencies in 2022?

**"Leverage technology to streamline and automate end-to-end recruiting processes."**

Survey Response

# ATS Market Share

Bullhorn maintains the majority of the market share for applicant tracking systems, but its lead has gotten smaller. Avionté is second, while Tracker is third. Many agencies are also using newer ATS platforms, which account for the high percentage of “Other” responses.



Bullhorn continues to lead the market with 24% market share.

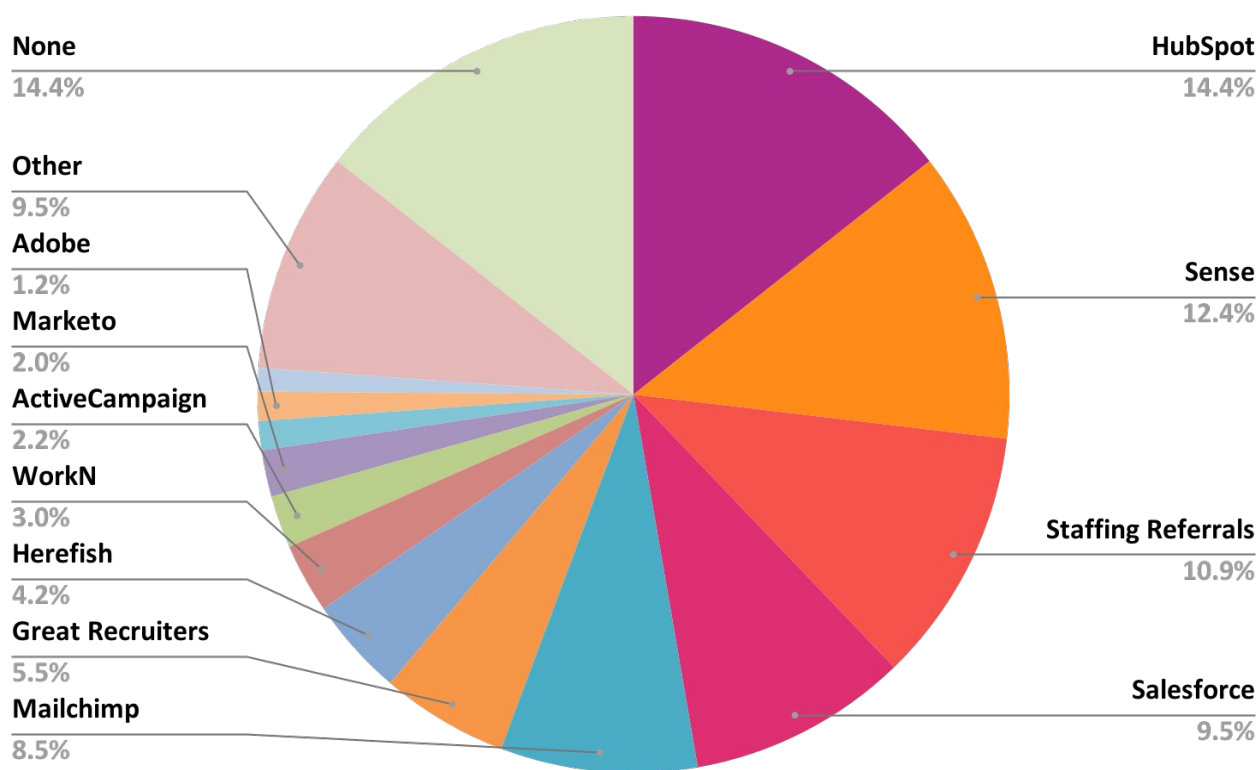


Avionté maintained its second position with 13% of the market.

# Recruiting Automation Tools

Roughly one-quarter (22.9%) of respondents said their agency doesn't use any marketing or recruiting automation at all, representing an opportunity for suppliers that can demonstrate an ROI.

Among agencies that do use automation, HubSpot is the most common, followed by Sense and Staffing Referrals. There are also many smaller suppliers and many agencies using automation tools that aren't specifically for the staffing industry, which accounts for the large percentage of "Other" responses.



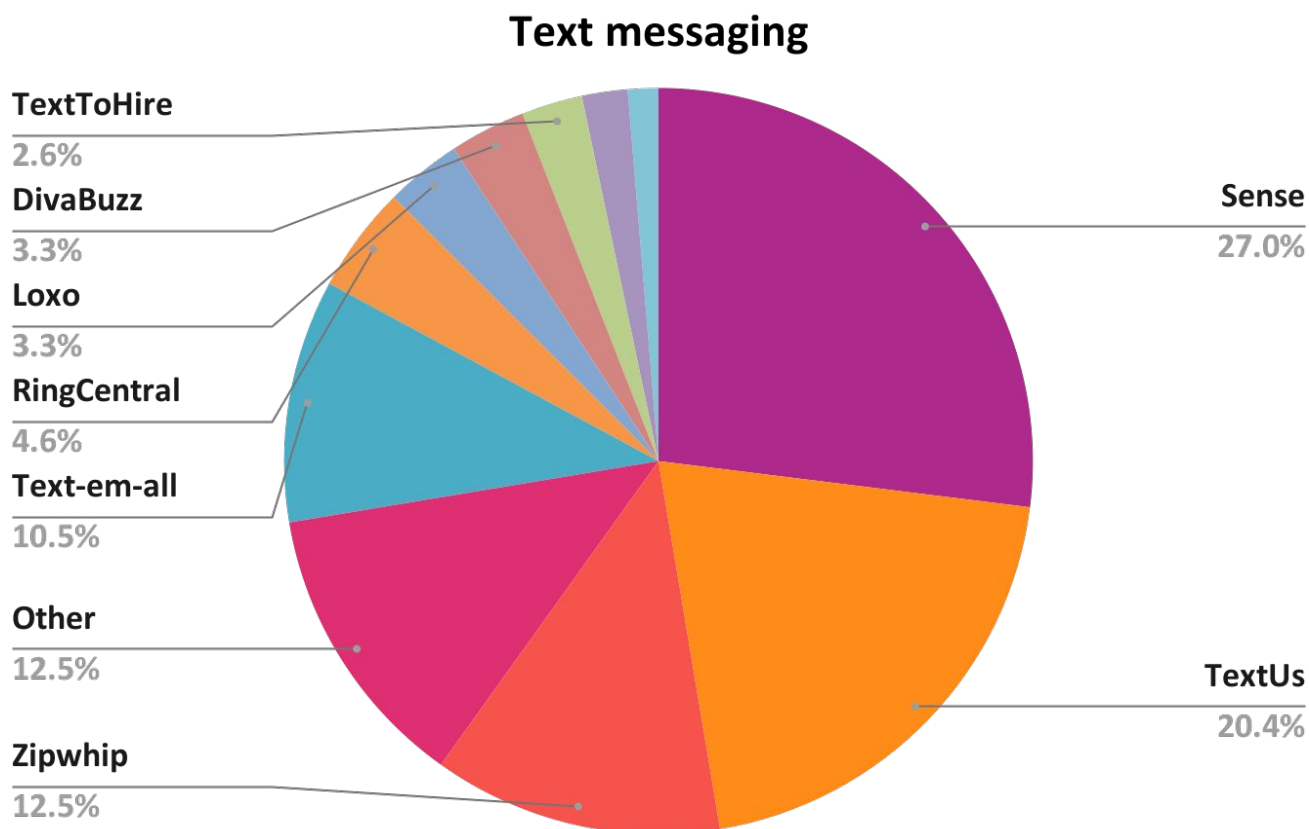
HubSpot is the most common recruiting automation tool, with 14.4% market share.



Sense came in second among recruiting automation tools, with 12.4%.

# Text Messaging Tools

61% of respondents said their firm currently uses text messaging software. Of those, Sense and TextUs claim nearly half (47.4%) of the market.



Sense overtook TextUs as market leader this year, capturing 27% of the market.

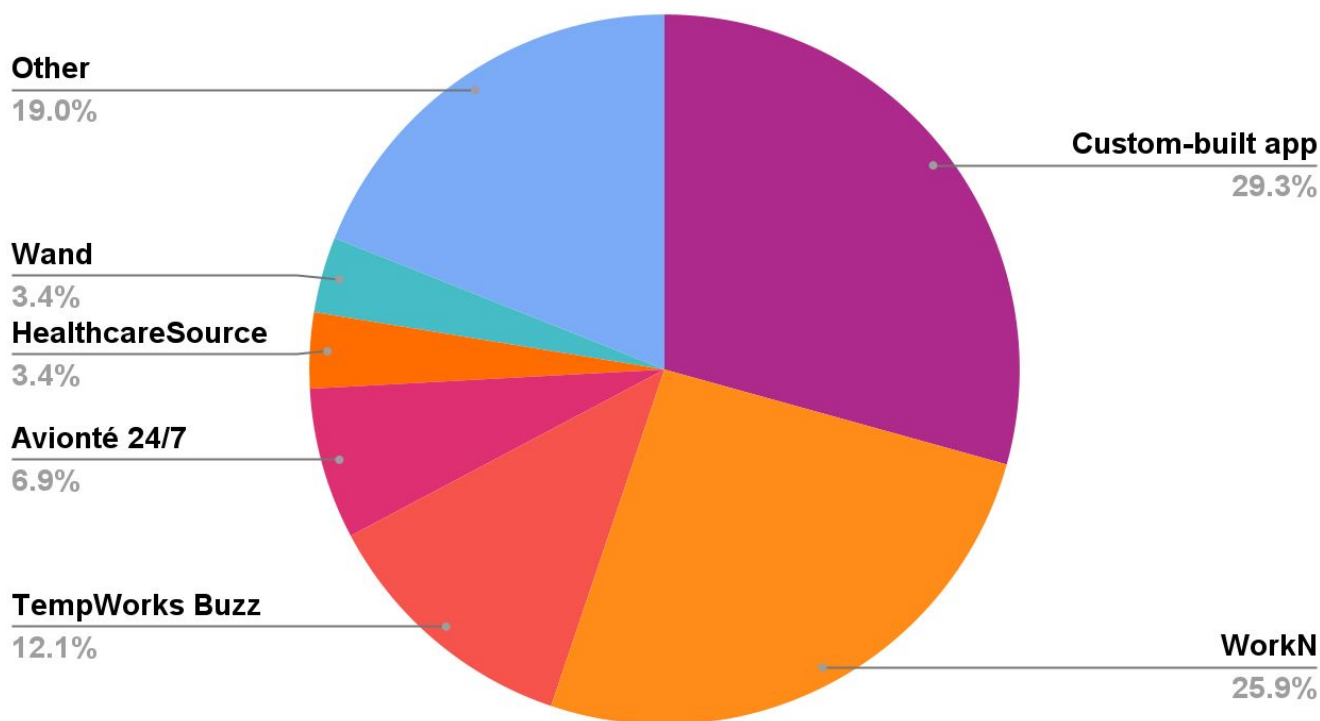


TextUs remains in second place with just over 20% of the market.



# Mobile Apps

One-third (33.7%) of agencies currently provide a mobile app for candidates. Almost 3 in 10 firms use a custom-built mobile app. Otherwise, the clear market leader is WorkN, with 25.9% market share.



WorkN is the market leader for mobile apps, with 25.9% market share.



TempWorks Buzz is second, with 12% market share.

# Chatbots

Approximately 18% of respondents in our survey indicated that their agencies currently use chatbots. For the small number of agencies, there is a wide variety of chatbot platforms being used.

HubSpot is the most common, with 13% of market share. No other technology reached more than a few percentage points, so here we provide the full list of chatbots mentioned by the respondents in our sample.



HubSpot is the most commonly used chatbot tool, with 13% of market share.

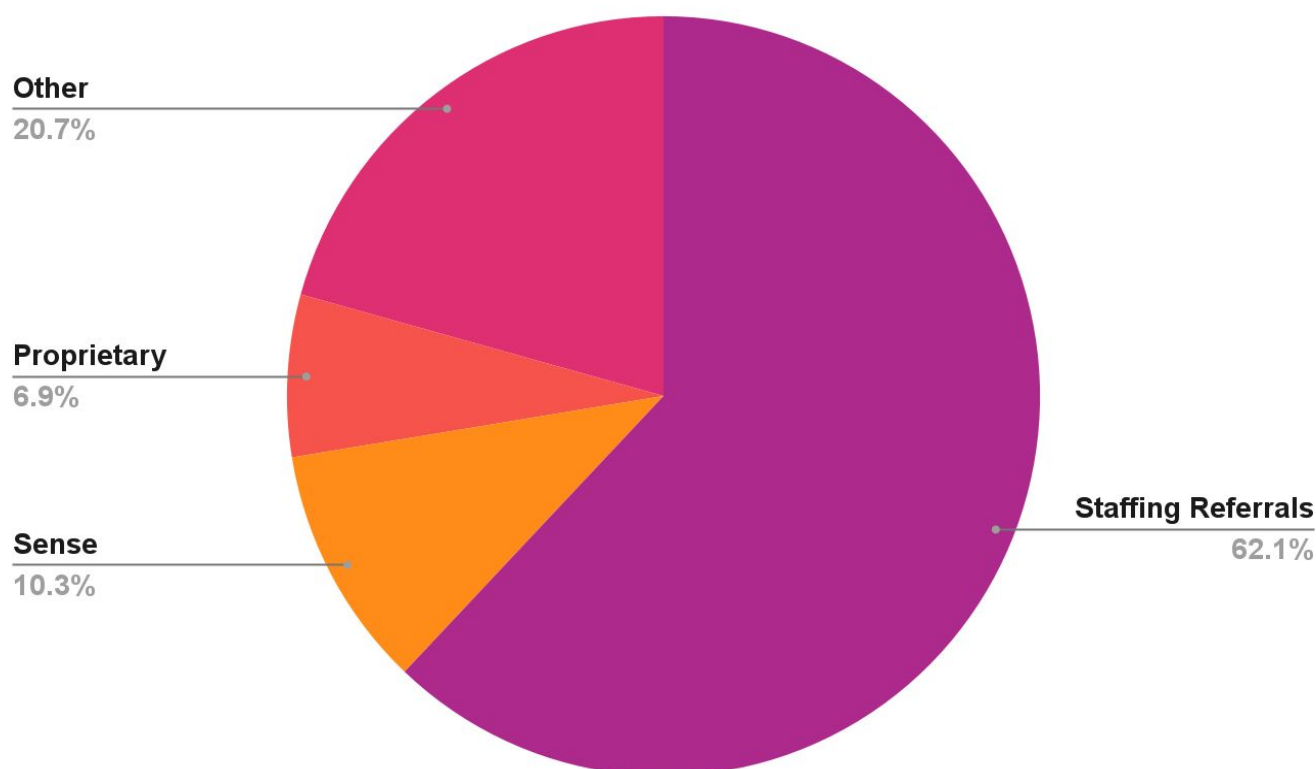
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## Other chatbot platforms used by staffing agencies:

- Capacity
- Digital Air Strike
- Drift
- Haley Marketing
- Homebase
- Intercom
- Lea
- Lifesize
- LiveChat
- ManyChat
- Microsoft
- Phenom
- Sense
- Staffing Engine
- tawk
- Tidio
- Turabit
- UiPath

# Automated Referral Management Tools

11% of agencies are currently using automated referral management (ARM) tools. Staffing Referrals is the most widely used, followed by Sense.



Staffing Referrals is the market leader, with more than 60% market share



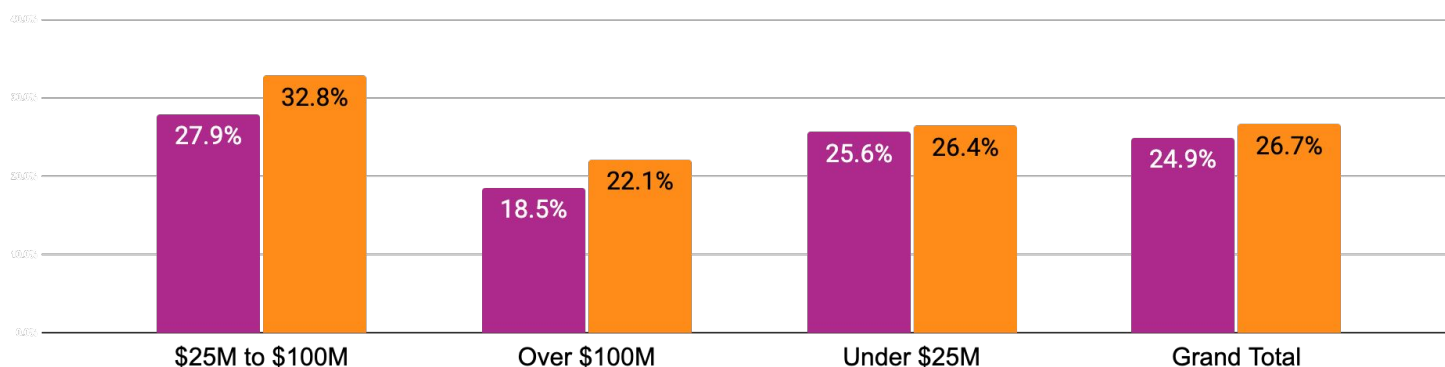
Sense is the second most popular tool for referral management.

# Tech & Software Budget

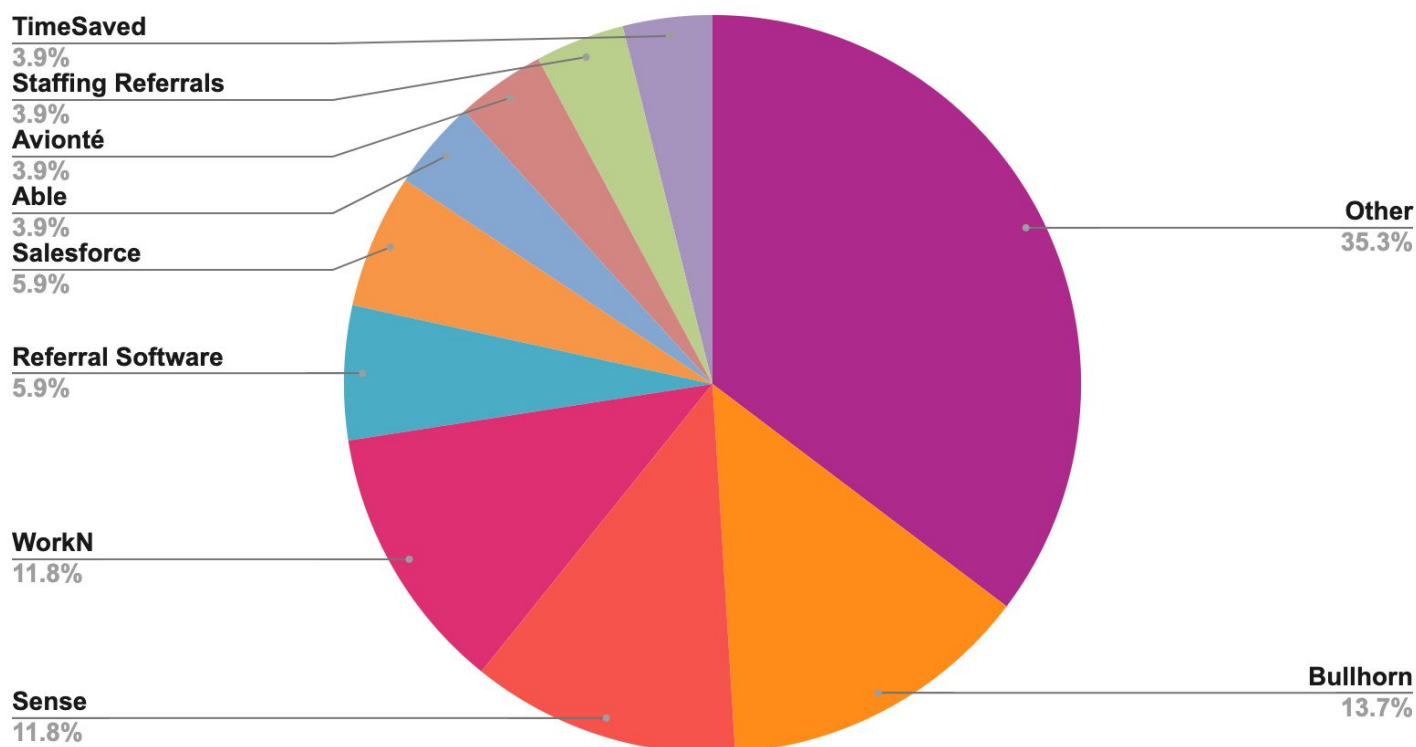
Staffing firms under \$25MM continue to allocate the largest portion of their budget to technology or software spend annually. Firms of all sizes expect to spend more in 2022 than they did in 2021.

What percent of your total budget do you plan to dedicate to software or technology solutions in 2022?

■ Tech spend 2021 ■ Expected tech spend 2022



## Planned Tech Implementations



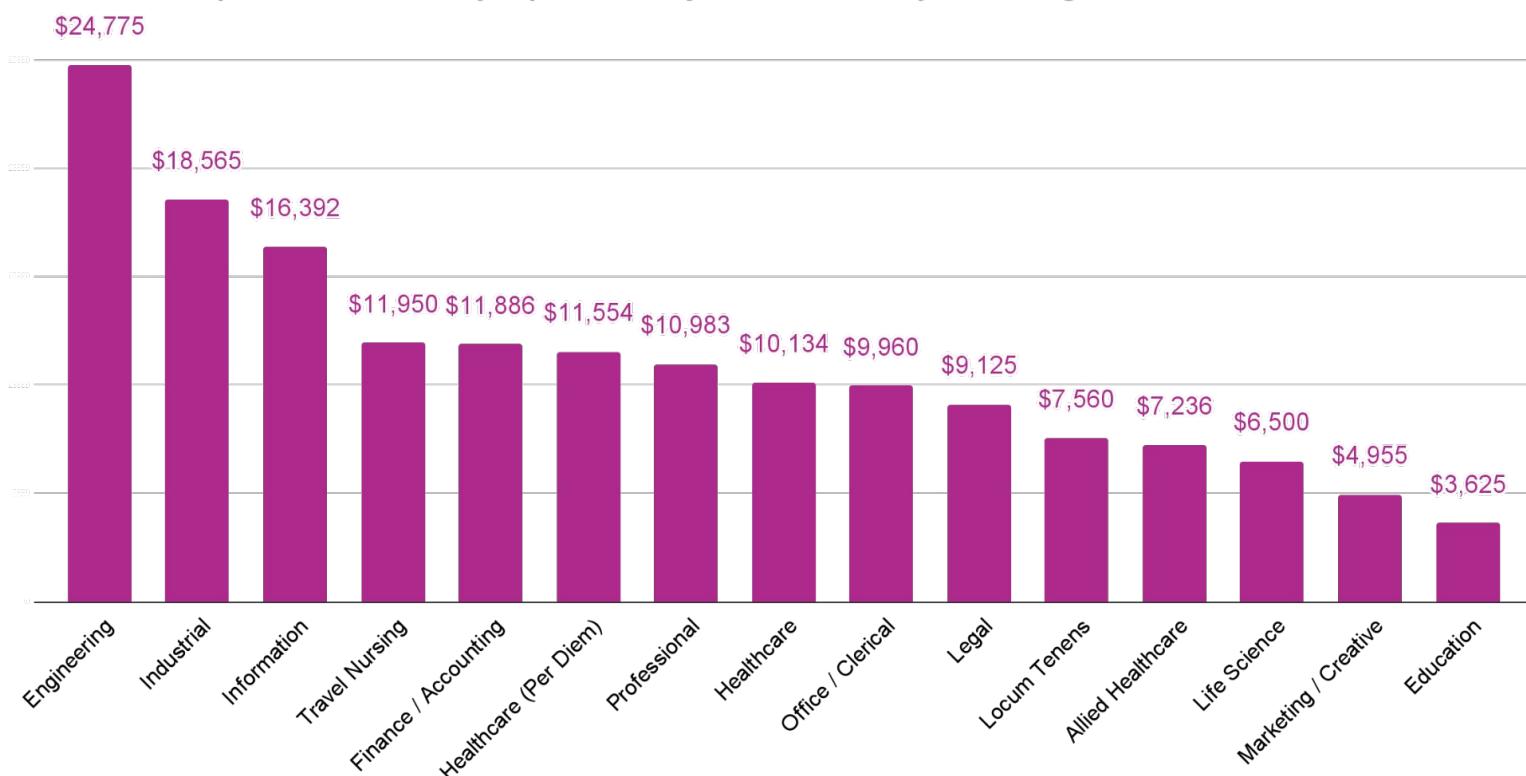
# Monthly Job Board Spend

Overall, fast-growth companies spend 62% more on job boards per month than slow-growth companies.

What is your monthly spend on job boards?



Expected monthly spend on job boards by staffing vertical in 2022



Agencies in the engineering, industrial, and information technology verticals spend the most on job boards every month.





5.0

# STAFFING AGENCY SUCCESS FACTORS

1. Agency Strategy
2. Key Performance Metrics
3. The Ideal Recruiter
4. Recruiter Experience and Candidate Benefits



# SECTION OVERVIEW

## Summary

This year, for the first time, we asked respondents what strategy they use to compete in the market. The most common response by far is that agencies compete by offering unique services, often combined with a specific segment of the market. The strategies were similar for fast- and slow-growth companies.

Relationship-building is also a key focus. Respondents identified “relationship-oriented” as the top attribute of an ideal recruiter.

Agencies are also pursuing a variety of initiatives, like offering flexible PTO, to enhance the recruiter experience, as well as providing benefits to enhance the candidate experience.

**"I think the market at the senior level where we focus is always in [a] state of opportunity flux, so ensuring we manage both the client and candidate experience to the optimum level pays dividends."**

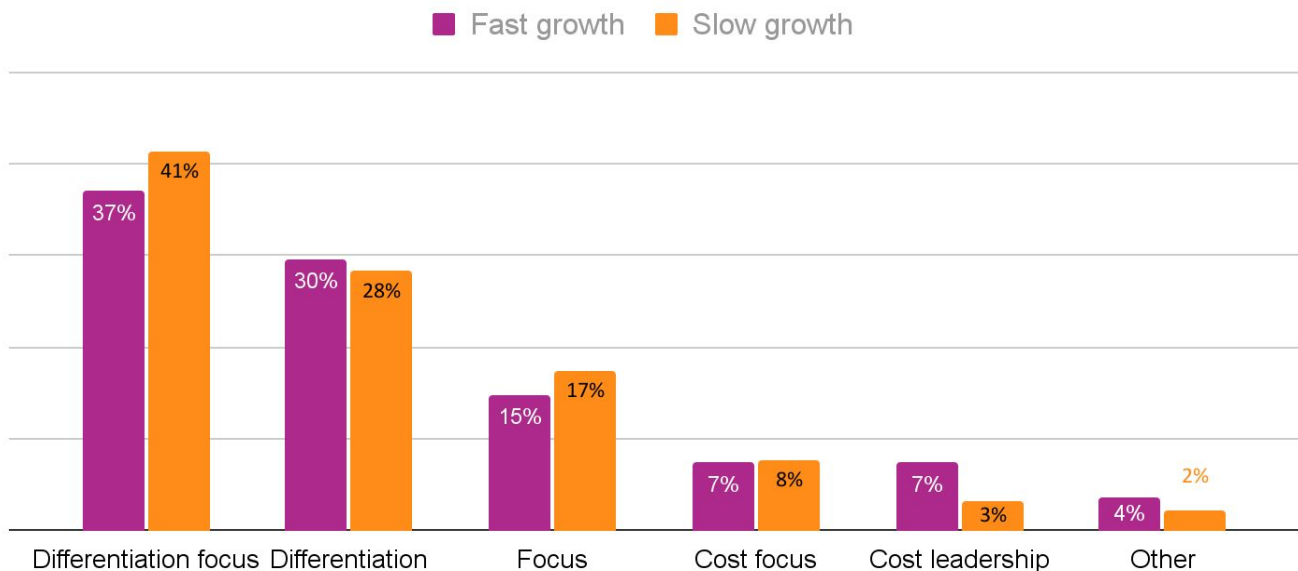
Survey Response

# Agency Strategy

Agency strategy refers to how companies create a competitive advantage. For this question, we asked respondents to choose the strategy that best describes the main way they seek to compete.

- Cost leadership = compete on price
- Differentiation = compete on unique services
- Focus = compete within a specific segment of the market
- Cost focus = compete on price within a specific segment of the market
- Differentiation focus = compete on unique services within a specific segment of the market

What best describes your agency's strategy?

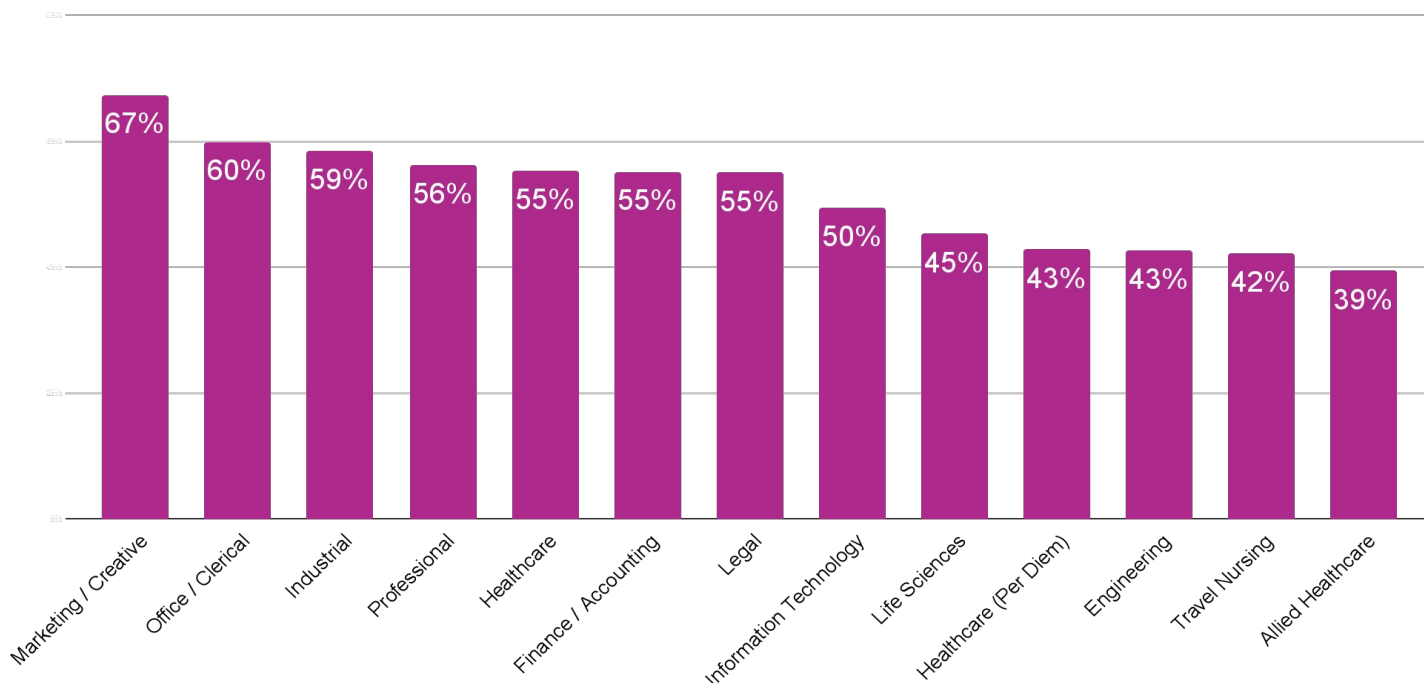


The majority of staffing agencies have adopted a strategy of either differentiation (compete on unique services) or differentiation focus (compete on unique services within a specific segment of the market).

# Key Performance Metrics

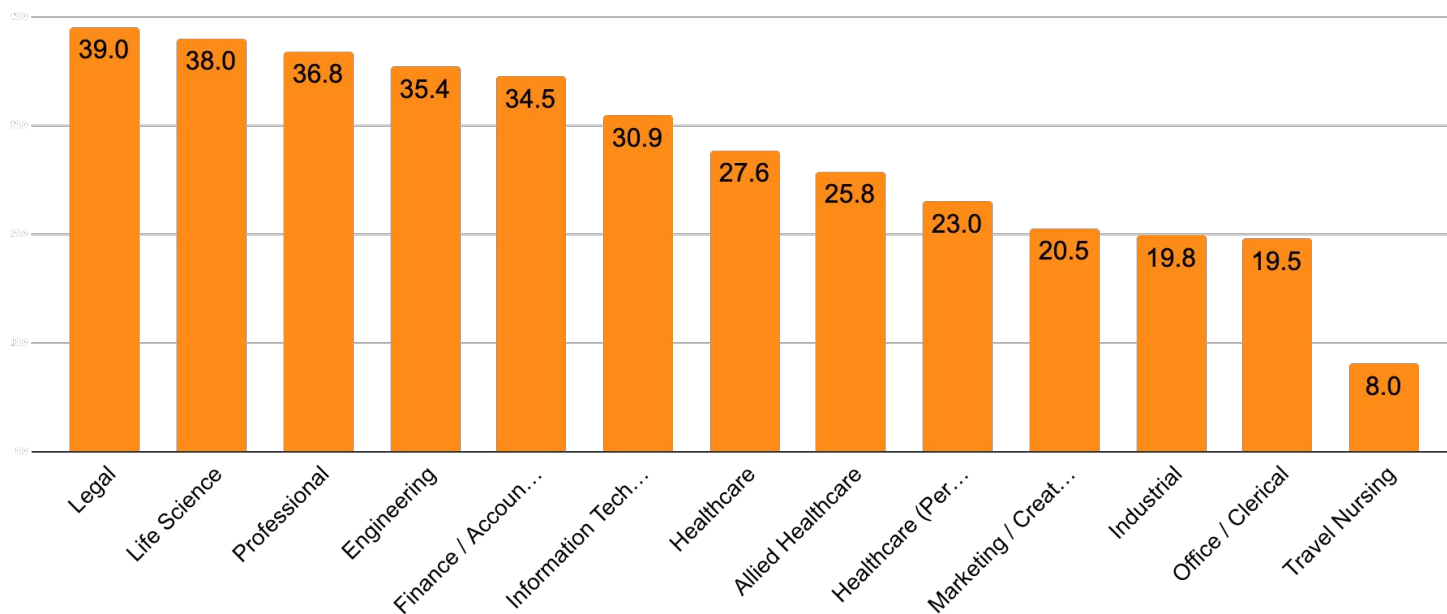
We asked respondents about several key performance, including how long it takes them to fill job orders, redeployment rate, and average cost per hire. On the next few pages, you'll find the results by industry vertical.

## Fill Rate



## Time to Fill

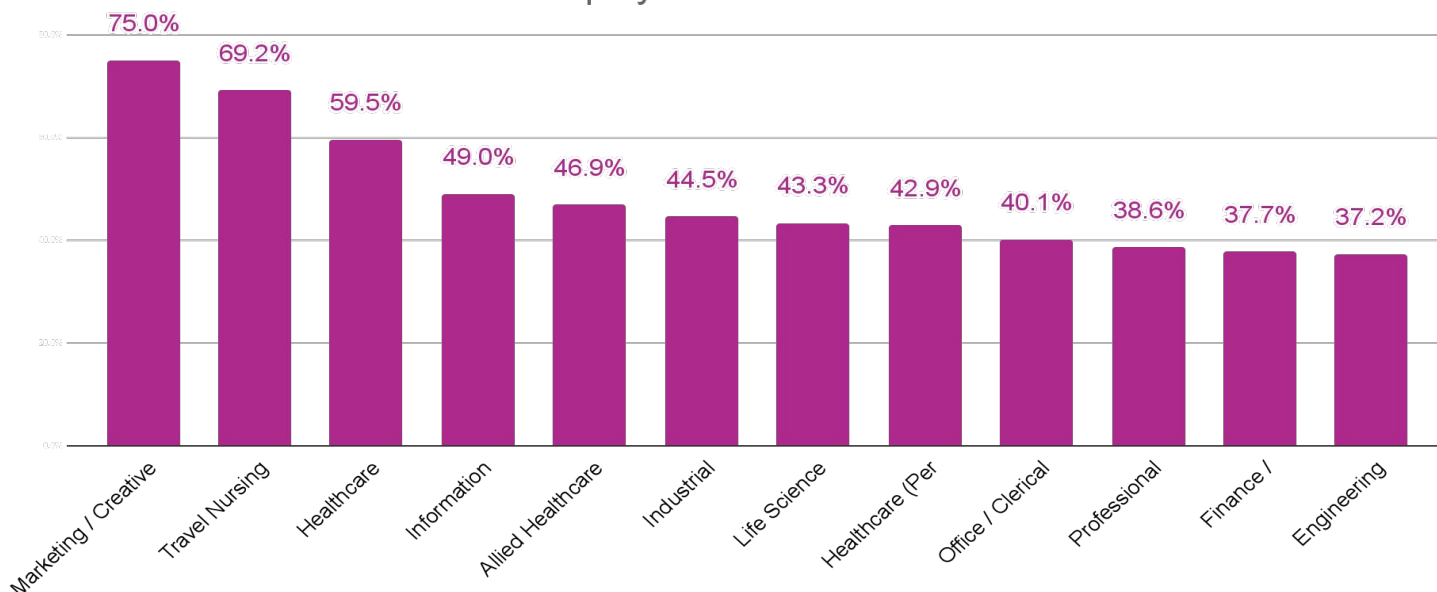
Number of days between when a job requisition is approved and the day an offer is accepted by the candidate



# Key Performance Metrics

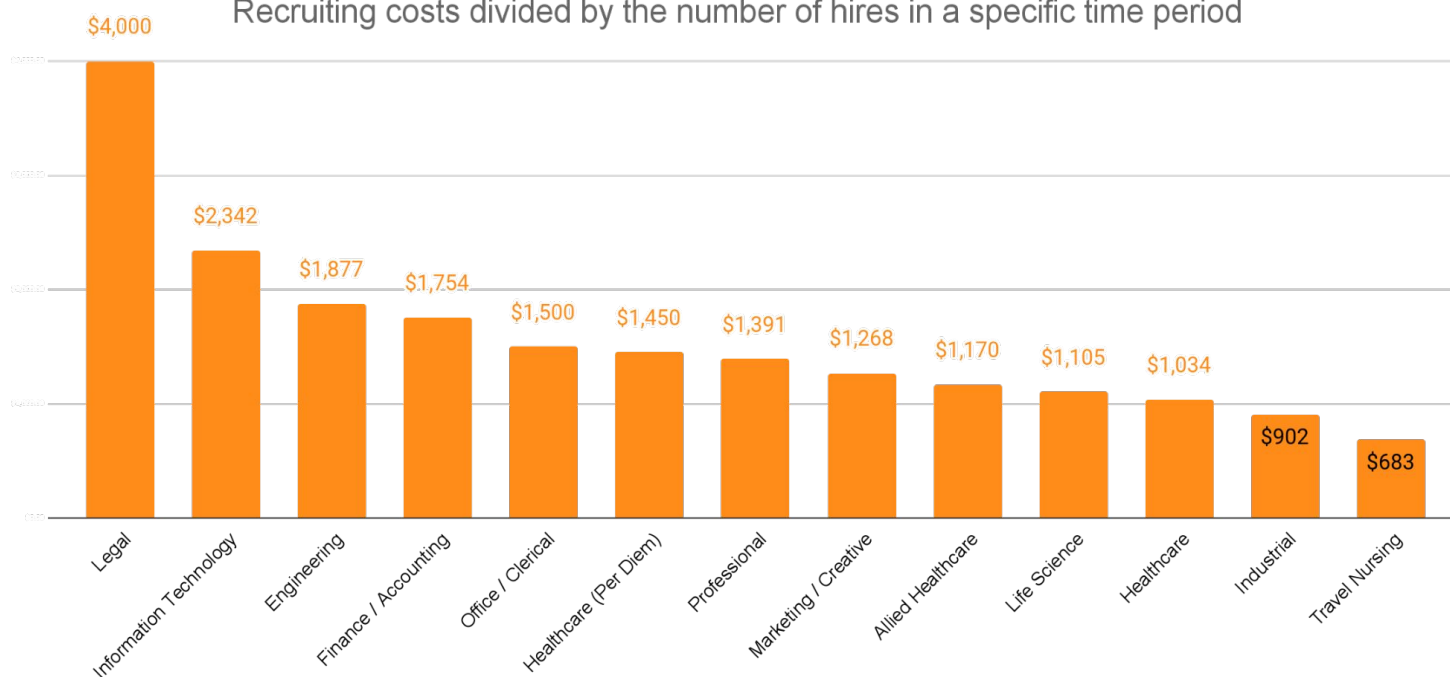
## Redeployment Rate

Percent of employees who renew their contract



## Cost per Hire

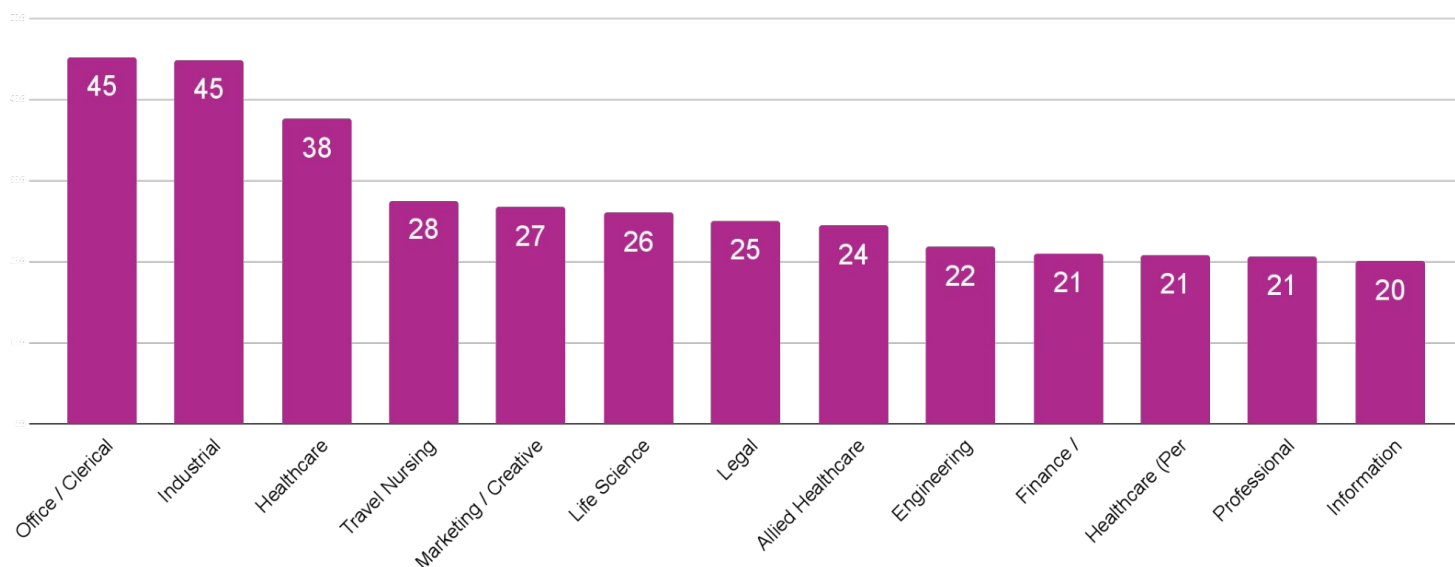
Recruiting costs divided by the number of hires in a specific time period



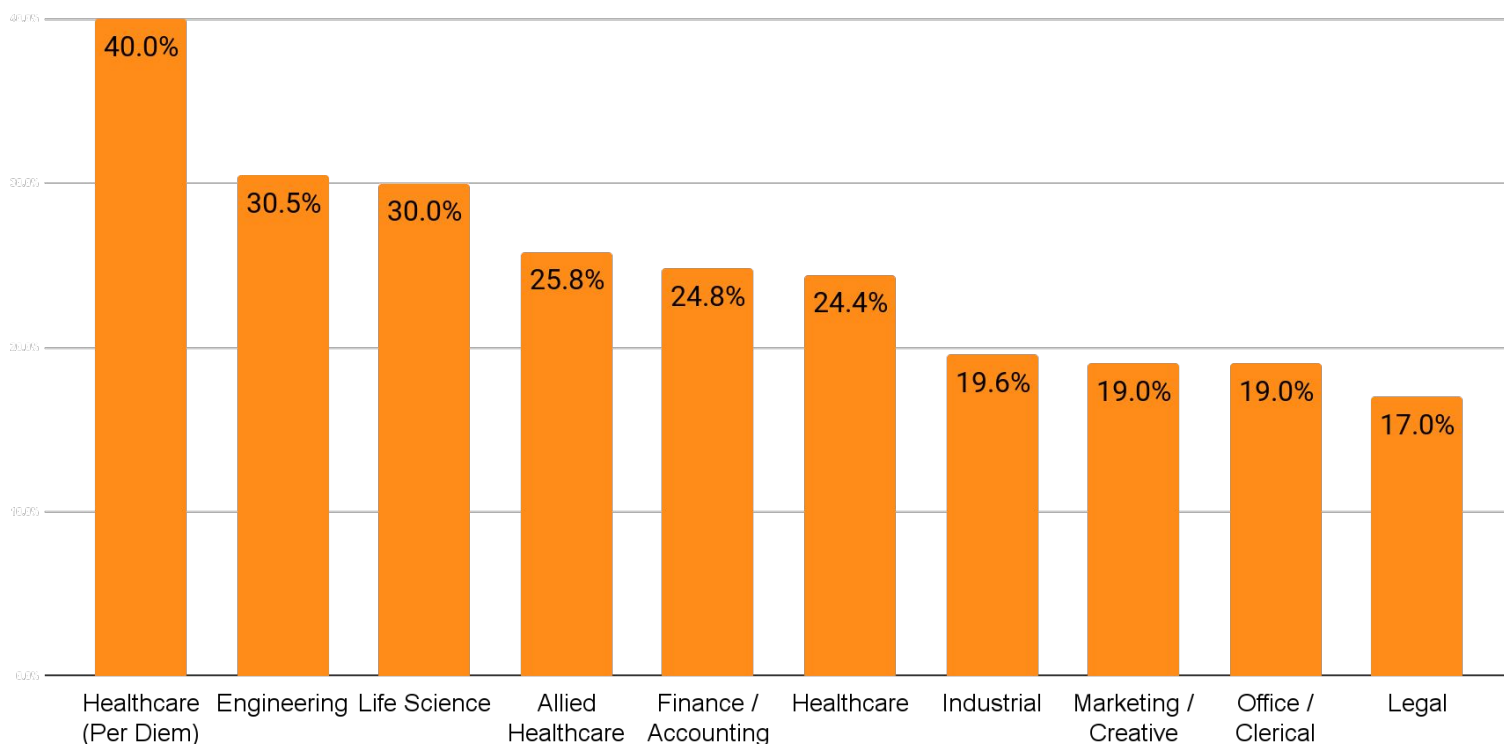


# Key Performance Metrics

## Active Contracts per Recruiter



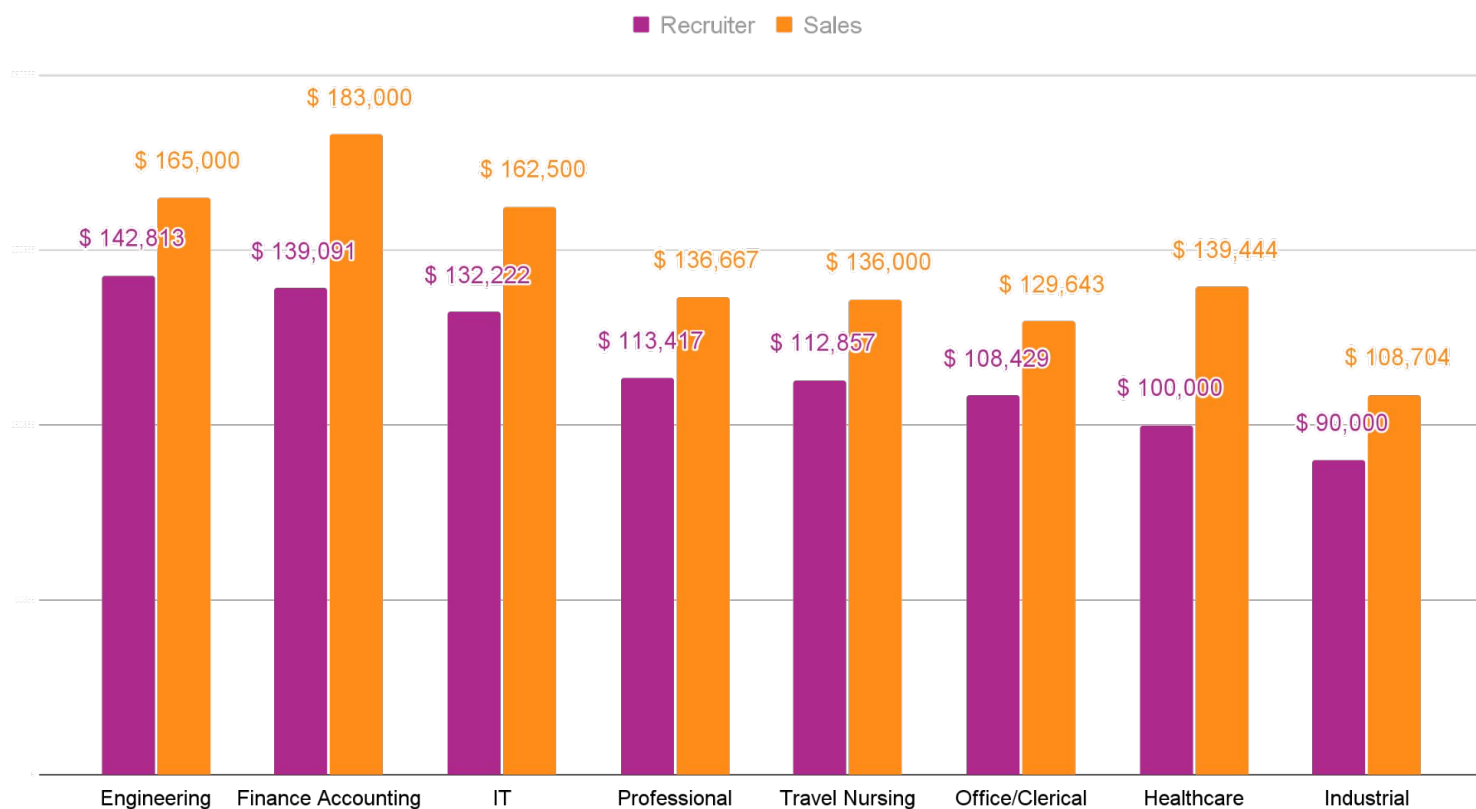
## Gross Margin per Recruiter



# Key Performance Metrics

## Recruiter & Sales Earnings

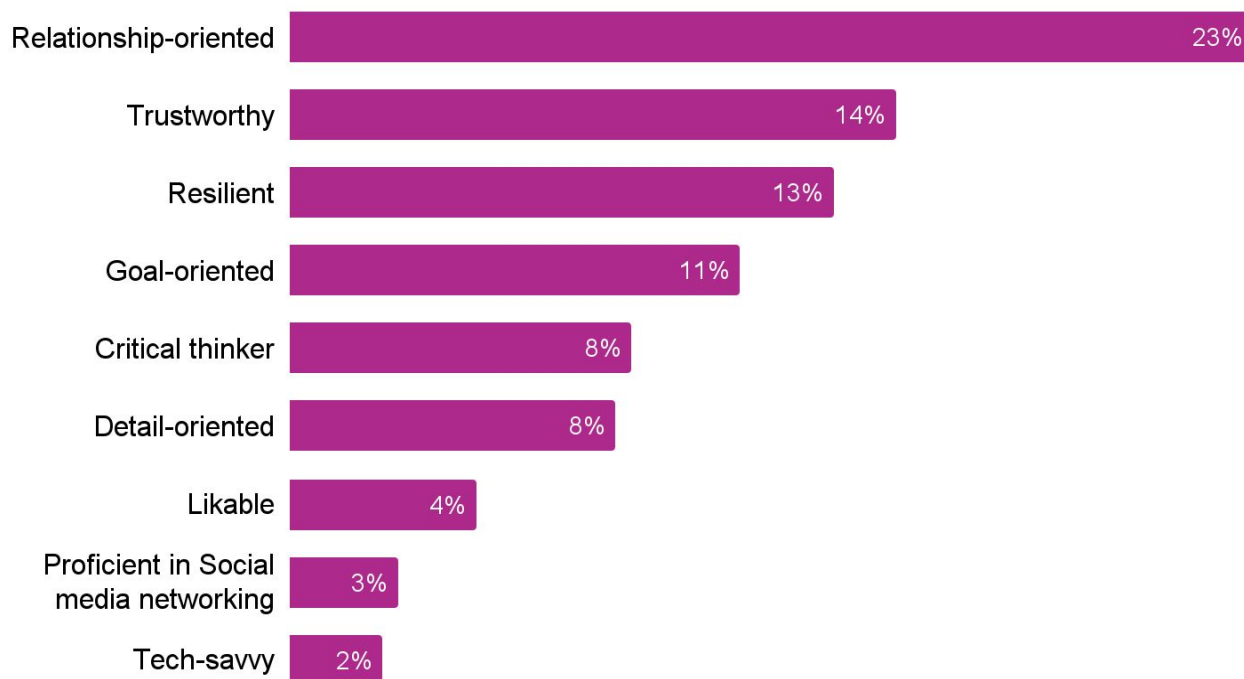
On Target Earnings (OTE) for Recruiters and Sales Team by Vertical



# The Ideal Recruiter

A relationship orientation was rated as the most important recruiter attribute.

Ideal recruiter attributes



Several respondents highlighted the importance of relationships when asked about the biggest opportunities for staffing industry growth.

Examples of responses:

- “Getting back to the basics and building stronger relationships with candidates and clients.”
- “Building on existing relationships. Offering flexible placement solutions to candidates and customers.”
- “In the days of candidate fatigue through social media engagement, networking and connecting live is essential to continue to drive relationship-centered growth.”

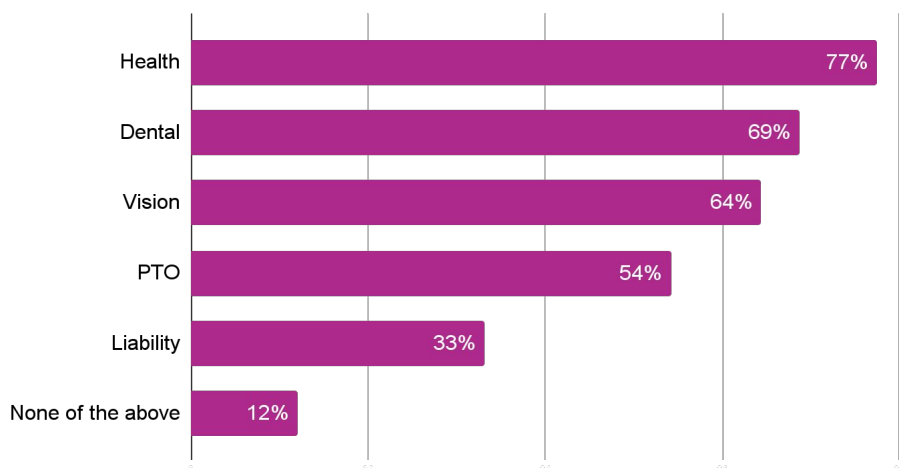
# Recruiter Experience

Agencies use a variety of initiatives to create a positive recruiter experience, including flexible time off and a focus on diversity, equity, and inclusion. However, there is room for agencies to do more — the aggregate answers suggest respondents only slightly agree with all of the statements.

How accurate are the following statements for your agency?  
(1 = strongly disagree, 5 = strongly agree)



What benefits do you offer candidates?



## Candidate Benefits

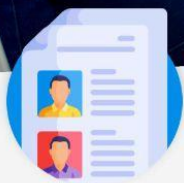
Health benefits are the most common benefits agencies offer to candidates. In open-ended responses many agencies also said they offer a 401(k).





## Fast, Flexible Software for Modern Agencies

# Recruiting CRM & ATS



### Recruit

Sell, Source & Recruit

- ✓ Applicant Tracking System
- ✓ Recruiting & Sales CRM
- ✓ Candidate Sourcing
- ✓ VMS Integration



### Hire

Hire & Onboard

- ✓ Onboarding
- ✓ Compliance
- ✓ eSignature
- ✓ Background Checks



### Deliver

Delivery & Back Office

- ✓ Assignments
- ✓ Mobile Timekeeping
- ✓ Invoicing
- ✓ Payroll Export





# RESOURCES AND ADVICE FOR NEW AGENCIES

1. Conference Attendance and Top Publications
2. Advice for New Agency Owners



# SECTION OVERVIEW

## Summary

Conferences provide excellent opportunities for staffing industry leaders to connect and learn.

ASA Staffing World, which takes place in October, is the top conference that respondents plan to attend this year. Staffing Industry Analysts continues to be viewed as the most valuable industry resource.

Last year, the most common piece of advice for new agency owners was “find a niche.” While that advice still holds, this year’s responses revolved more around being resilient, learning about the industry, and making smart tech choices.

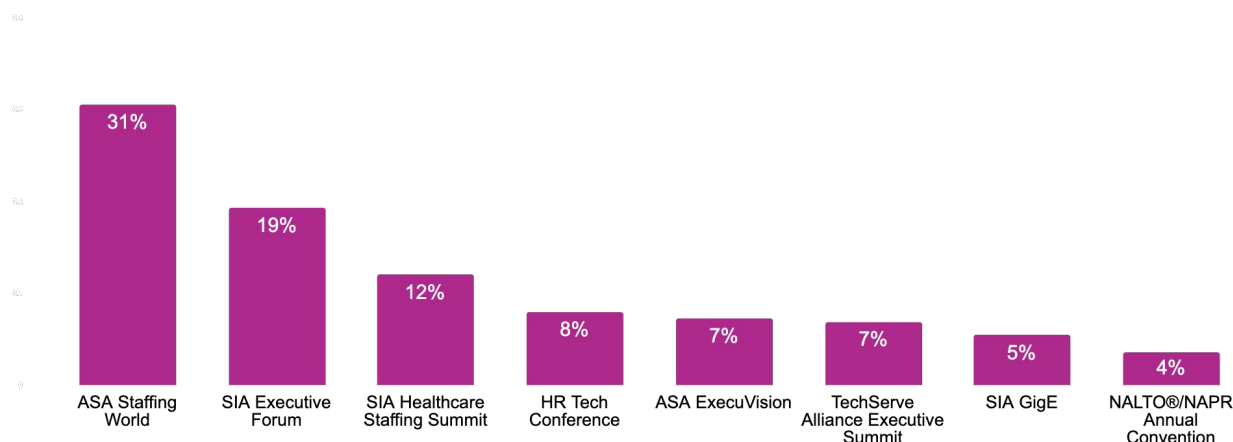
**"The changing demands  
of talent will guide the  
next 10 years in staffing."**

Survey Response

# Conference Attendance

Respondents expect to attend fewer conferences this year (though COVID certainly foiled many plans). While ASA Staffing World is still in first place, the percentage of respondents who plan to go has dropped from 54% to 31%.

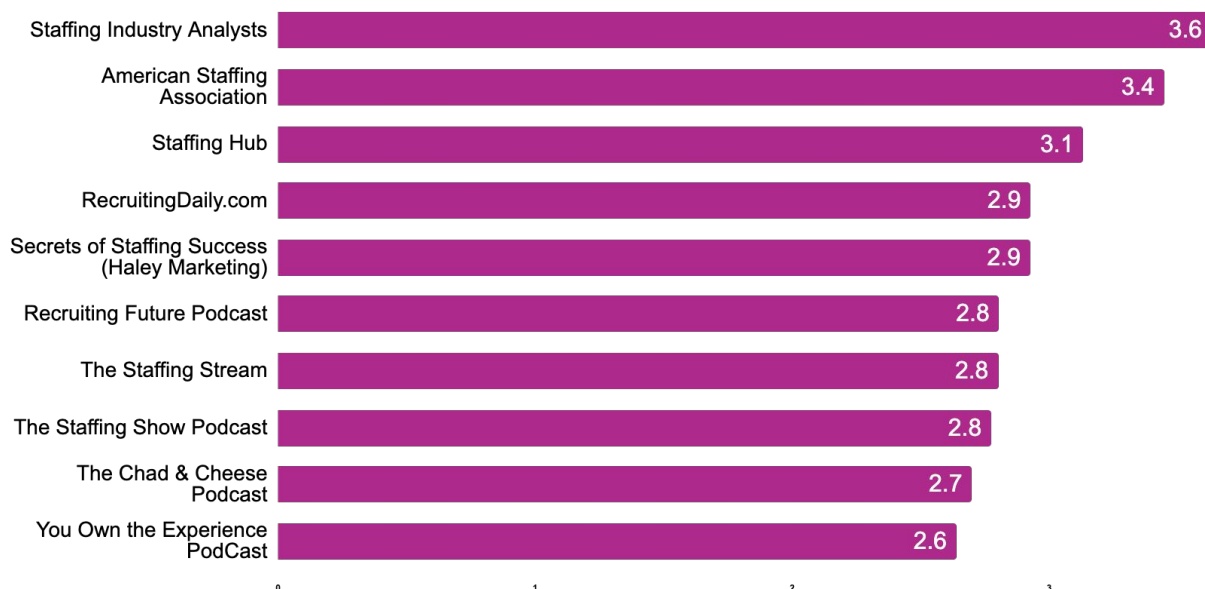
What events do you plan to attend in 2022?



## Most Valuable Publications and Content

Staffing Industry Analysts and the American Staffing Association continue to be viewed as the most valuable resources in the staffing industry.

How Valuable are the Following Publications, Podcasts, or Blogs?  
(1 = least valuable, 5 = most valuable)



# Advice for New Agency Owners

If you're new to the industry, a few of the top recommendations from your peers include **be resilient**, **learn as much as you can about the industry**, and **make smart tech choices**.

Here are a few of the most frequent themes and comments from your peers:

**"Give it time."** It takes months before all of the parts and pieces start making sense and feeding off each other.

**Immerse yourself** in the topic by listening to webinars. Trust the technology.

**Be SUPER** tech savvy and sales oriented.

**Be resilient**

**Make sure you have clean data.**  
**It's the difference** between being able to use technology effectively [and] just using technology at its most basic level.

**Be prepared** for a roller coaster ride. Staffing is great if you are tenacious and can handle high highs and low lows.





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### OPTIMIZE

communications, processes, experiences, & outcomes for your entire business



### THRIVE

with Tracker's beloved (98% ranked by G2) support and success team



### ENGAGE

at scale with candidates, clients, on assignment contractors, and your employees



### INSIGHT

with analytics in your hands, including customizable and robust reporting and dashboards

- ✓ ATS
- ✓ CRM
- ✓ AUTOMATION
- ✓ MARKETING
- ✓ JOB BOARDS
- ✓ SOCIAL MEDIA
- ✓ BACK OFFICE
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Staffing Hub

# STATE *of* STAFFING

2022

## THE TEAM

**Authors:** Krista Garver and David Folwell

## METHODOLOGY

In January of 2022, Staffing Hub surveyed 275 industry executives and 583 members of the workforce.

Their responses are the basis of this report.



# STATE of STAFFING

## Notes

[illegible]



Staffing Hub

THANK YOU!