North America

STAFFING INDUSTRY ANALYSTS

2016 Largest Staffing Firms in the United States

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Market Information and Forecasts

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Key Findings

- This report highlights 134 companies that generated at least $100 million in U.S. staffing revenue in 2015. Added together, these firms generated $75.7 billion in such revenue, making up 56.8% of the market by our estimates. The full list of companies appears starting on page four.
- We define "staffing" revenue as revenue generated from the provision of temporary workers to business clients, as well as from "place & search" services (direct hire/ permanent placement and retained search.) We also include revenue from "temp-to-hire" conversions.
- We have ranked companies by revenue, according to industry custom, but this ranking should not be taken to imply that a firm with a higher rank provides better service or more value to its shareholders.
- Staffing firms varied in degree of financial transparency, and even when forthcoming with information, in some cases data provided was adjusted for the sake of consistency. Therefore, for all firms on this list, the revenue reported is estimated by Staffing Industry Analysts.
- Overall, we believe that this list is accurate and can be used appropriately to get a "big picture" reading of the U.S. staffing industry landscape. However, as transparency and availability of information from staffing companies can vary from one year to the next, this year's estimates may not be comparable to those of previous years in all cases. For that reason, we did not display prior year revenue estimates in this report.
- Additional details on the methodology of this report are provided on page eleven.

This represents the 21st annual report on the largest staffing firms in the U.S. produced by Staffing Industry Analysts. All of the companies listed were invited to provide their revenue numbers via online survey in February/March 2016. For firms that did not participate in the survey, revenue estimates were based on company reports, company websites and other sources. Our lists are of strong interest to staffing buyers, and we hope those listed will benefit from the increased buyer awareness. Firms not on this list that feel they should have been included are encouraged to contact Staffing Industry Analysts, as we will be releasing a follow-up briefing for any late additions. Many thanks to the staffing firms who offered their encouragement and assistance in this year's report process.

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Observations on the 2016 Largest Staffing Companies in the U.S.

- The U.S. staffing industry continues to be a fragmented industry characterized by a multitude of competitors. The largest firm in the U.S. market, Allegis Group, held 6.5% of the market while the combined 134 companies listed in this report represented slightly more than half (56.8%) of the market.
- Not surprisingly, the industrial and IT skill segments were the largest temporary staffing skill segments by revenue for 43 and 40 companies, respectively, on this year's list. Healthcare was the largest skill segment for 20 firms, with nine companies offering travel nurse staffing as their biggest segment. In contrast, the office/clerical and finance/accounting segments were the largest segment for five and three firms, respectively, a low number of companies given the size of these segments. The remaining firms had the following segment as their largest: engineering (10 firms), retained search (5 firms), clinical/scientific (5 firms), education (2 firms) and marketing/creative (1 firm).
- Ten out of the 14 largest staffing companies are publicly traded, suggesting that public ownership remains a popular financing structure for large staffing operators. The only privately held firms among the top 14 are Allegis Group, Employbridge Holding Company, Express Employment Professionals and Insight Global. A total of 21 companies in this year's report are publicly traded.
- To our knowledge, at least 8 companies on this year's list are owned by entities based outside of the United States. These firms are Adecco, Randstad Holding, Recruit, Impellam Group, The Peoplelink Group (Groupe CRIT), Sthree, DOCS Global (ICON plc) and Veredus (Hays plc).
- Nineteen firms are included on this year's list that did not appear in last year's report. The companies are Accurate Personnel, Advanced Group, AllStaff, BelFlex Staffing Network, Chartwell Staffing Solutions, Compunnel Software Group, DIVERSANT, Green Key Resources, Hire Dynamics, Loyal Source, North American On-Site, Principle Solutions Group, Staffing 360 Solutions, Sthree, The Execu|Search Group, The Select Group, U.S. Tech Solutions, Veredus (Hays plc) and Vista Staffing (Envision Healthcare Holdings).
- Four companies appearing in last year's report do not appear this year due to acquisition. The Select Family of Staffing Companies became EmployBridge Holding Company; Creative Circle joined On Assignment; Atterro joined Recruit; Bartech was acquired by Impellam Group.
- The 15 largest firms each generated more than $1 billion in U.S. staffing revenue last year. Added together, these companies generated $46.4 billion, making up 34.8% of the market.

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Rank	Company	2015 U.S. Staffing Revenue ($million)	Market Share	Largest segment(s)
1	**Allegis Group**	8,633	6.5%	IT, Industrial
2	**Adecco**	4,627	3.5%	Industrial, Office/clerical
3	**Randstad Holding**	4,625	3.5%	Industrial, Office/clerical
4	**ManpowerGroup**	3,540	2.7%	Industrial, IT
5	**Robert Half International**	3,481	2.6%	Finance/accounting, Office/clerical
6	**Kelly Services**	3,393	2.5%	Industrial, Office/clerical
7	**EmployBridge Holding Company**[1]	3,048	2.3%	Industrial, Office/clerical
8	**Express Employment Professionals**	2,920	2.2%	Industrial, Office/clerical
9	**TrueBlue**[2]	2,650	2.0%	Industrial
10	**On Assignment**[3]	2,074	1.6%	IT, Marketing/creative
11	**Recruit**[4]	2,030	1.5%	Industrial, Office/clerical
12	**Insight Global**	1,478	1.1%	IT, Finance/accounting
13	**AMN Healthcare Services**[5]	1,435	1.1%	Travel nurse, Locum tenens
14	**Kforce**	1,319	1.0%	IT, Finance/accounting
15	**CHG Healthcare Services**	1,120	0.8%	Locum tenens, Travel nurse
16	**Act•1 Group**	948	0.7%	Office/clerical, IT
17	**Volt Information Sciences**	867	0.7%	Industrial, IT
18	**Elwood Staffing**	804	0.6%	Industrial, Office/clerical
19	**Cross Country Healthcare**[6]	753	0.6%	Travel nurse, Per diem nurse
20	**CDI Corporation**[7]	751	0.6%	Engineering, IT

1. Reflects revenue of EmployBridge and The Select Family of Staffing Companies, which combined in 1Q15.
2. Includes revenue from SIMOS Insourcing Solutions, acquired 4Q15.
3. Includes revenue from Creative Circle, acquired 2Q15.
4. Includes revenue from Atterro, acquired 2Q15.
5. Includes revenue from multiple acquisitions in 2015.
6. Includes revenue from Mediscan, acquired 4Q15.
7. Includes revenue from EdgeRock Technologies, acquired 4Q15. Includes $302 million in direct hire revenue, primarily from MRINetwork franchises.

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21	**Jackson Healthcare**	697	0.5%	Locum tenens, Allied healthcare
22	**System One**[8]	622	0.5%	Engineering, IT
23	**Integrity Staffing Solutions**	570	0.4%	Industrial
24	**ACS Group (American CyberSystems)**	564	0.4%	IT, Allied healthcare
25	**Nesco Resource**	497	0.4%	Industrial, Engineering
26	**Yoh**	471	0.4%	IT, Engineering
27	**Collabera**	465	0.3%	IT
28	**RGP (Resources Connection)**	400	0.3%	Finance/accounting, IT
29	**Maxim Healthcare Services**	384	0.3%	Per diem nurse, Travel nurse
30	**Impellam Group**[9]	371	0.3%	Office/clerical, Industrial
31	**Artech Information Systems**	365	0.3%	IT
32	**Korn/Ferry International**	360	0.3%	Retained search
33	**The Judge Group**	355	0.3%	IT, Allied healthcare
34	**Spencer Stuart**	350	0.3%	Retained search
35	**Beacon Hill Staffing Group**	348	0.3%	IT, Legal
35	**Superior Group**	348	0.3%	Engineering, IT
37	**Roth Staffing Companies**	329	0.2%	Office/clerical, Industrial
38	**The Peoplelink Group (Groupe CRIT)**	324	0.2%	Industrial, IT
39	**C&A Industries**	321	0.2%	Allied healthcare, Travel nurse
40	**CoWorx Staffing Services**	319	0.2%	Industrial, Office/clerical

8. Includes revenue from multiple acquisitions in 2015.
9. U.S. operations include Corestaff and s•com. Includes revenue from Bartech, acquired 4Q15.

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41	**Labor Finders**	312	0.2%	Industrial
42	**Aquent**	311	0.2%	Marketing/creative
43	**Acro Service Corporation**	305	0.2%	IT, Industrial
44	**PDS Tech**	291	0.2%	Engineering, Industrial
45	**Supplemental Health Care**	289	0.2%	Travel nurse, Per diem nurse
46	**Digital Intelligence Systems (DISYS)**	287	0.2%	IT, Finance/accounting
47	**Heidrick & Struggles International**	285	0.2%	Retained search
48	**The Onin Group**	282	0.2%	Industrial, IT
49	**MAU Workforce Solutions**	281	0.2%	Industrial, Office/clerical
50	**Parallon Workforce Solutions (HCA)**	261	0.2%	Per diem nurse, Travel nurse
51	**AtWork Group**	257	0.2%	Industrial, Office/clerical
52	**Signature Consultants**	253	0.2%	IT, Finance/accounting
53	**Global Employment Solutions**	250	0.2%	IT, Office/clerical
53	**Rose International**	250	0.2%	IT, Office/clerical
55	**Veritude**	249	0.2%	IT, Other professional
56	**BG Staffing**[10]	246	0.2%	IT, Industrial
57	**Sthree**	243	0.2%	Engineering, IT
58	**Addison Group**	240	0.2%	IT, Finance/accounting
59	**Snelling**	237	0.2%	Industrial, Office/clerical
60	**Trillium Staffing**	235	0.2%	Industrial, Office/clerical

10. Includes revenue from multiple acquisitions in 2015.

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61	**Chartwell Staffing Solutions**[11]	231	0.2%	Industrial, Office/clerical
62	**Johnson Service Group**	230	0.2%	Engineering, Industrial
63	**Strategic Staffing Solutions**	228	0.2%	IT
64	**Aya Healthcare**	225	0.2%	Travel nurse
64	**Healthcare Staffing Services, Fastaff & US Nursing**	225	0.2%	Travel nurse
66	**Eliassen Group**	218	0.2%	IT
66	**Open Systems Technologies (BAHA Industries)**	218	0.2%	IT, Finance/accounting
68	**Medical Solutions**	217	0.2%	Travel nurse
69	**CTG (Computer Task Group)**	213	0.2%	IT
70	**BHI Energy|Staffing Solutions**	204	0.2%	Engineering, Industrial
71	**TekPartners/MedPartners**	203	0.2%	Allied healthcare, IT
72	**Egon Zehnder**	200	0.2%	Retained search
72	**Pinnacle Group**	200	0.2%	IT, Office/clerical
74	**PrideStaff**	195	0.1%	Industrial, Office/clerical
75	**Eastridge Workforce Solutions**	192	0.1%	Industrial, Office/clerical
76	**Belcan**	187	0.1%	Engineering, Clinical/scientific
76	**Matrix Resources**	187	0.1%	IT
78	**Trustaff**	184	0.1%	Travel nurse, Allied healthcare
79	**Nelson**	183	0.1%	Office/clerical, Industrial
80	**Solomon Page Group**	182	0.1%	Clinical/scientific, Finance/accounting

11. Includes revenue from multiple acquisitions in 2015.

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81	**Automation Personnel Services**	181	0.1%	Industrial, Office/clerical
82	**PESG (Professional Educational Services Group)**	180	0.1%	Education
83	**Mitchell Martin**	179	0.1%	IT, Allied healthcare
84	**QPS Employment Group**	178	0.1%	Industrial
85	**Pyramid Consulting**	177	0.1%	IT
86	**Russell Reynolds Associates**	175	0.1%	Retained search
86	**TransForce**[12]	175	0.1%	Industrial
88	**Barrett Business Services**	169	0.1%	Industrial, Office/clerical
88	**Vista Staffing (Envision Healthcare Holdings)**	169	0.1%	Locum tenens
90	**Swift Worldwide Resources**[13]	168	0.1%	Engineering
91	**Genesis10**	164	0.1%	IT
92	**CorTech**[14]	162	0.1%	Industrial, Office/clerical
93	**Kimco Staffing Services**	154	0.1%	Industrial, Office/clerical
94	**Accountable Healthcare Staffing**	150	0.1%	Travel nurse, Per diem nurse
94	**DOCS Global (ICON plc)**	150	0.1%	Clinical/scientific
94	**inVentiv Health**	150	0.1%	Clinical/scientific
94	**Source4Teachers**	150	0.1%	Education
94	**TRC Staffing Services**	150	0.1%	Industrial, Office/clerical
99	**Loyal Source**	147	0.1%	Travel nurse, Locum tenens
100	**ettain group**	145	0.1%	IT, Marketing/creative

12. Includes revenue from multiple acquisitions in 2015.
13. Merged with Air Energi Group to form Airswift Holdings in 1Q16.
14. Includes revenue from multiple acquisitions in 2015.

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101	**Effex Management Solutions**	144	0.1%	Industrial
102	**TRS Staffing Solutions**	135	0.1%	Engineering, Office/clerical
103	**Malone Workforce Solutions (Management Registry)**	134	0.1%	Industrial, Per diem nurse
104	**Mastech**[15]	132	0.1%	IT
104	**Staffing 360 Solutions**[16]	132	0.1%	Industrial, IT
106	**The Execu|Search Group**	130	0.1%	Allied healthcare, Office/clerical
107	**Medix**	127	0.1%	Allied healthcare, IT
108	**Paramount Staffing**	125	0.1%	Industrial
109	**InGenesis**	123	0.1%	Per diem nurse, Locum tenens
110	**Sedona Group**	122	0.1%	Industrial, IT
111	**BelFlex Staffing Network**	121	0.1%	Industrial
111	**ICONMA**	121	0.1%	IT, Engineering
113	**Princeton Information**	120	0.1%	IT
114	**Advanced Group**	118	0.1%	Clinical/scientific, Office/clerical
115	**Mindlance**	117	0.1%	IT, Clinical/scientific
116	**DIVERSANT**[17]	116	0.1%	IT
117	**Accurate Personnel**	115	0.1%	Industrial, Office/clerical
117	**Penmac Staffing Services**	115	0.1%	Industrial, Office/clerical
117	**SNI Companies**	115	0.1%	Office/clerical, Finance/accounting
117	**US Tech Solutions**	115	0.1%	IT, Clinical/scientific

15. Includes revenue from Hudson Global's IT staffing operations, acquired 3Q15.
16. Includes revenue from multiple acquisitions in 2015.
17. Includes revenue from Vircon, acquired 3Q15.

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121	**Compunnel Software Group**	113	0.1%	IT, Engineering
122	**AllStaff**	109	0.1%	Industrial, Office/clerical
122	**The Reserves Network**	109	0.1%	Industrial, Engineering
124	**The Select Group**	107	0.1%	IT
125	**Green Key Resources**	104	0.1%	Finance/accounting, Clinical/scientific
125	**Hire Dynamics**	104	0.1%	Industrial, Office/clerical
125	**Veredus (Hays plc)**	104	0.1%	IT
128	**Headway Workforce Solutions**	102	0.1%	Clinical/scientific, Marketing/creative
128	**North American On-Site**	102	0.1%	Industrial, Office/clerical
128	**VisionPRO (Vision Information Technologies)**	102	0.1%	IT
131	**Cornerstone Staffing Solutions**	101	0.1%	Industrial, Office/clerical
131	**Favorite Healthcare Staffing**	101	0.1%	Per diem nurse, Travel nurse
133	**Principle Solutions Group**	100	0.1%	IT
133	**Tekmark Global Solutions**	100	0.1%	IT
Total		**75,650**	**56.8%**	

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Additional notes and explanation of methodology

- For the purposes of this report, we define “staffing” revenue as revenue generated from the provision of temporary workers to business clients, as well as from “place & search” services (direct hire/permanent placement and retained search.) We also include revenue from “temp-to-hire” conversions. In order to maintain a strict focus on “staffing” revenue, we exclude revenue generated from other services offered by staffing companies: consulting services where billing is based on deliverables; process outsourcing (MSP, RPO, HRO); PEO and payrolling; outplacement; VMS or “human cloud” services.
- The “staffing” revenue figures found in this report conform to the above definition to facilitate consistency and comparability across companies. In addition, this definition of staffing revenue aligns with the market size estimates that we produced in our most recent U.S. Staffing Industry Forecast report, published in April 2016. This alignment allows us to calculate the market share for each listed company by dividing its staffing revenue by our 2015 U.S. staffing industry market size estimate of $133.3 billion.
- To the extent that we are able, the 2015 staffing revenue estimates shown in this report include the full-year (“pro forma”) 2015 revenue of any staffing companies acquired during 2015. We do this to more accurately reflect annual market share of the acquiring firm moving forward. We call out noteworthy staffing firm acquisitions in the footnotes of this report.
- Revenue estimates reflect calendar year 2015. Revenue estimates include gross staffing revenue generated by franchises.
- Due to the complexity involved with producing the staffing revenue estimates in this report, the presence of acquisition revenue, and variability from one year to the next in the transparency and availability of revenue data from staffing companies, comparisons of revenue estimates from last year’s report and this year’s report do not necessarily provide a reliable measure of revenue growth at a particular company or for a particular segment. For better insight on organic revenue growth trends in the U.S. staffing industry, we recommend our U.S. forecast reports.
- Regarding the data sources used for this report, we invited staffing firms in February to complete a detailed Excel-based application form indicating 2015 staffing revenue by country and segment. A substantial majority of the companies appearing in this report supplied revenue information via the application form, which was then validated by comparison with other publicly available data. Revenue estimates were sent to company management for review, and in many cases feedback received resulted in more accurate estimates.

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