



Core Skill Sectors and Industry Segments

Largest IT Staffing Firms in the United States: 2017 Update

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Key Findings:

- We estimate that 43 firms generated at least \$100 million in US information technology temporary staffing revenue in 2016. Added together, these firms generated \$18.0 billion in such revenue, accounting for 63% of the market, by our estimates. The complete list of 43 firms can be found starting on page three of this report.
- In this market share report, we have ranked companies in order of revenue size, 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, we reserve the right to adjust data for the sake of consistency. Therefore, for all firms in this report, revenue shown should be considered an estimation by Staffing Industry Analysts.
- Market share percentages in this report were calculated by dividing each company's revenue figure by our estimate of \$28.6 billion for the US IT temporary staffing market in 2016.
- Overall, we believe that this list is accurate and can be used appropriately to get a “big picture” reading of the US IT temporary 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.
- Three firms are included on this year's ranking that did not appear in last year's report: NTT Data, Principle Solutions Group, and V-Soft Consulting.
- Additional details on the methodology of this report are provided on page seven.

All of the companies included in this report were invited to provide their revenue numbers via online survey in February 2017. For firms that did not participate in the survey, revenue estimates were based on company reports, company websites and other sources. Our market share reports 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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Ranked by estimated 2016 US IT temporary staffing revenue

Rank	Company	2016 US IT Temporary Staffing Revenue (\$million)	Market Share
1	TEKsystems (Allegis Group)	3,468	12%
2	On Assignment	1,617	6%
3	Insight Global	1,525	5%
4	Randstad Technologies	1,116	4%
5	Kforce	942	3%
6	Experis (ManpowerGroup)	845	3%
7	Modis (Adecco)	683	2%
8	ACS Group (American CyberSystems)	563	2%
9	Robert Half International	500	2%
10	Collabera	476	2%
11	Artech Information Systems	391	1%
12	The Judge Group	351	1%
13	NTT Data	335	1%
14	Signature Consultants	302	1%
15	Recruit	300	1%
16	Yoh ¹	266	1%
17	Digital Intelligence Systems (DISYS)	252	1%
18	Eliassen Group	237	1%
19	CDI Corporation	214	1%
20	Volt Information Sciences	200	1%

1. Includes revenue from the acquisition of Starpoint Solutions (4Q16).

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Ranked by estimated 2016 US IT temporary staffing revenue

Rank	Company	2016 US IT Temporary Staffing Revenue (\$million)	Market Share
21	Beacon Hill Staffing Group	191	1%
21	CTG (Computer Task Group)	191	1%
21	Strategic Staffing Solutions	191	1%
24	Kelly Services	190	1%
25	Matrix Resources	185	1%
26	Open Systems Technologies	180	1%
27	Pyramid Consulting	171	1%
28	Mitchell Martin	167	1%
28	Veritude	167	1%
30	DIVERSANT	164	1%
31	Genesis10	161	1%
32	Global Employment Solutions	150	1%
33	ettain group	142	<1%
34	Acro Service Corporation	136	<1%
35	Pinnacle Group	132	<1%
36	The Select Group	128	<1%
37	Act•1 Group	125	<1%
38	Superior Group	124	<1%
39	ICONMA	121	<1%
40	Mastech Digital	119	<1%

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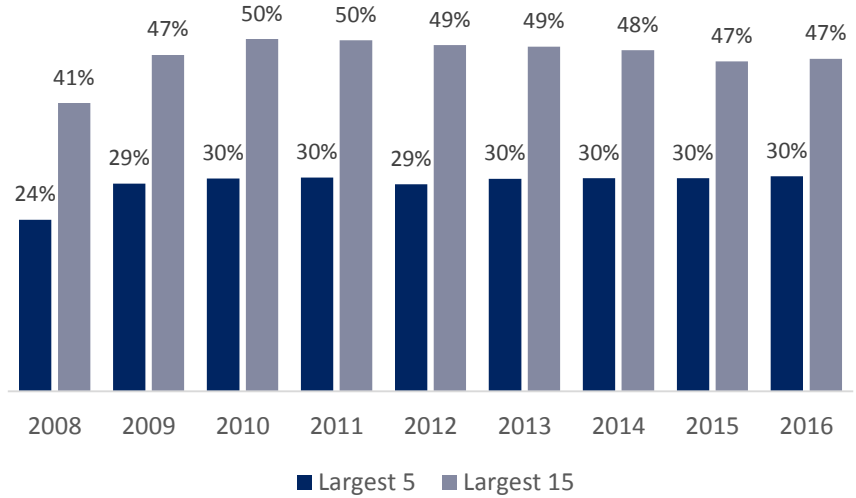
Ranked by estimated 2016 US IT temporary staffing revenue

Rank	Company	2016 US IT Temporary Staffing Revenue (\$million)	Market Share
41	Principle Solutions Group	105	<1%
42	V-Soft Consulting	103	<1%
43	Princeton Information	100	<1%
Total		18,026	63%

Market share held by the five largest IT staffing firms holding steady

- The chart at right shows the combined market share of the five largest and 15 largest IT staffing firms from 2008 to 2016, according to our annual reports on the largest IT staffing firms in the United States.
- The market share captured by the five largest and 15 largest IT staffing firms increased from 2008 to 2010. Since then, the share held by the five largest has stayed roughly the same, while the share held by the fifteen largest has slightly declined.
- We note that the consolidation from 2008 to 2010 was driven in part by some large acquisitions that closed in 2010: ManpowerGroup’s acquisition of COMSYS IT Partners and Adecco’s acquisition of MPS Group.

Combined market share of the 5 largest and 15 largest IT staffing firms, 2008 to 2016



Additional notes and explanation of methodology


- For the purposes of this report, we define “temporary staffing” revenue as revenue generated from the provision of temporary workers to business clients. Direct hire, retained search, and temp-to-hire revenue is not included. We also 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; online staffing and “human cloud” services.
- We define “IT” temporary staffing as the furnishing of temporary workers with IT skills. Examples of IT occupations include software engineers, computer systems analysts, database administrators and information security analysts. All other types of engineers other than software engineers fall into our “engineering” segment and are not included in our “IT” segment.
- The definition of IT temporary staffing revenue used in this report exactly matches the definition used for our market size estimates that we produced in our most recent US Staffing Industry Forecast report, published in April 2017. This allows us to calculate the market share for each company listed in this report by dividing its staffing revenue by our 2016 US IT temporary staffing market size estimate of \$28.6 billion.
- To the extent that we are able, the 2016 staffing revenue estimates shown in this report include the full-year (“pro forma”) 2016 revenue of any staffing companies acquired during 2016. 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 2016. 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 insight on revenue growth trends in the US staffing industry, we recommend our US Staffing Industry 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 2016 staffing revenue by country and occupational segment. A 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. For companies that chose not to supply revenue information, we made staffing revenue estimates based on publicly available information and our industry knowledge. Revenue estimates were sent to company management for review, and in many cases feedback received resulted in more accurate final estimates.

About Staffing Industry Analysts

Founded in 1989, Staffing Industry Analysts is the global advisor on staffing and workforce solutions. Our proprietary research covers all categories of employed and non-employed work including temporary staffing, independent contracting and other types of contingent labor. SIA’s independent and objective analysis provides insights into the services and suppliers operating in the workforce solutions ecosystem including staffing firms, managed service providers, recruitment process outsourcers, payrolling/ compliance firms and talent acquisition technology specialists such as vendor management systems, online staffing platforms, crowdsourcing and online work services. We also provide training and accreditation with our unique Certified Contingent Workforce Professional (CCWP) program.

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