Economic Report **2019**

WORLD EMPLOYMENT CONFEDERATION

The Voice of Labour Market Enablers

LEADING
IN A CHANGING
WORLD OF WORK

WORLD
EMPLOYMENT
CONFEDERATION
The Voice of Labour Market Enablers

About the World Employment Confederation

The World Employment Confederation is the voice of the employment industry at a global level, representing labour market enablers from 50 countries as well as seven of the largest international workforce solutions companies. Members of the World Employment Confederation represent a wide range of HR services, including agency work, direct recruitment, career management, Recruitment Process Outsourcing (RPO) and Managed Services Provider (MSP).

The World Employment Confederation works to broaden recognition of the positive economic and social role which the employment industry plays in enabling work, adaptation, security and prosperity. This work involves building networks with relevant stakeholders such as policy makers, social partners and the academic world; setting high recruitment and employment standards and practices; acting as a thought-leader shaping futureproof and competitive labour markets and providing strategic data on employment issues.

Should you have any questions regarding the facts and figures published in this Economic Report, do not hesitate to get in touch with the World Employment Confederation's Head Office at **info@wecglobal.org**.

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Foreword

The private employment industry continued to diversify in 2017. While agency work remained the core activity, generating the majority of revenue, its share of the global private employment services industry has remained relatively stable over the past three years at around two-thirds.

Direct recruitment and MSP have both gained traction, with a significant increase of over 50 percent observed in direct recruitment. RPO has also recorded positive growth, although its share remains small in the total industry landscape.

As a result of this growth, the private employment industry generated €457 billion in global sales revenues via a network of 165,000 agencies. Across the regions, the outlook is also positive with countries including Mexico, Brazil, Spain, Italy and Japan becoming strong performers. Worldwide, the private employment industry placed 53 million individuals in employment during 2017.

If you are a regular reader of the World Employment Confederation's Economic Report, you will notice that this 2019 edition looks slightly different. We decided to dedicate this report to providing a comprehensive picture of the private employment industry's market; both across the different services that we represent and around the world.

In previous reports, we also included data demonstrating how our industry contributes to better functioning labour markets by enabling work, adaptation, security and prosperity. We are working on focusing our social impact reporting and will develop a new way of presenting this data in the near future.

Denis Pennel

Denis Pennel
Managing Director

Even Hagelien

Even Hagelien
Chair of the Economic Affairs Committee

Overview of the private employment services represented in this report

Agency Work
is a triangular employment relationship, defined in ILO Convention 181 as: "Services consisting of employing workers with a view to making them available to a third party, who may be a natural or legal person ("user enterprise") which assigns their tasks and supervises the execution of these tasks".

Managed Services Providers
MSP is a service whereby a company takes on primary responsibility for managing an organization's contingent workforce program. Typical responsibilities of an MSP include overall program management, reporting and tracking, supplier selection and management, order distribution and often consolidated billing. An MSP may or may not be independent of a staffing supplier.

Direct Recruitment
Services for matching offers of and applications for employment, without the private employment agency becoming a party to the employment relationships which may arise therefrom (Source: ILO Convention 181), including executive search & selection.

Recruitment Process Outsourcing
A service by a third-party specialist provider, to assume the role of the client's recruiting department by owning and managing part or all of its recruitment process and related recruitment supply chain partner relationships, provide the necessary skills, activities, tools, technologies, and process methodologies.

Career Management
Main service segments are individual, executive, and group outplacement services and other employment transition services. In these segments, outplacement services companies provide a range of employment and career services. These include resume writing, interview skills, job search strategies, coaching and career guidance. Employers generally pay all of the costs associated with these services.

Key Findings

In 2017, the private employment services industry generated €457 billion in global sales revenues, which represents an industry growth rate of 13% year-on-year. The major share of revenue is attributed to agency work, which produced over €370 billion* alone. In Europe, the five largest markets all experienced growth, with revenue figures for Italy up 25% compared to 2016. The Dutch agency work market grew by 11%, while the French, the UK and the German markets are up by 10%, 9% and 8% respectively. Across the Atlantic, the US market grew slightly in 2017 (at least in dollar terms) and remains by far the largest market worldwide in terms of sales revenues. Turning to the Asian market, Japan has experienced significant growth in revenue, with agency work turnover increasing by 22% in 2017.

MSP and RPO services have experienced growth across all regions in 2017, with the USA being by far the largest market for MSP with close to 60%** of global spend. RPO markets in Europe, the Middle East and Africa have grown by 33% compared to 2016***. Globally, MSP and RPO markets are up by 12%** and 16%*** respectively.

Global revenues for direct recruitment services reached €61 billion in 2017. Again, the US market contributes the major revenue share to the global figure, having generated more than €23 billion alone. However, the Asian and Pacific markets have gained considerably in size as well, producing €21.3 billion in revenues in 2017. Overall, the global direct recruitment services industry has grown by more than 50% year-on-year in 2017.

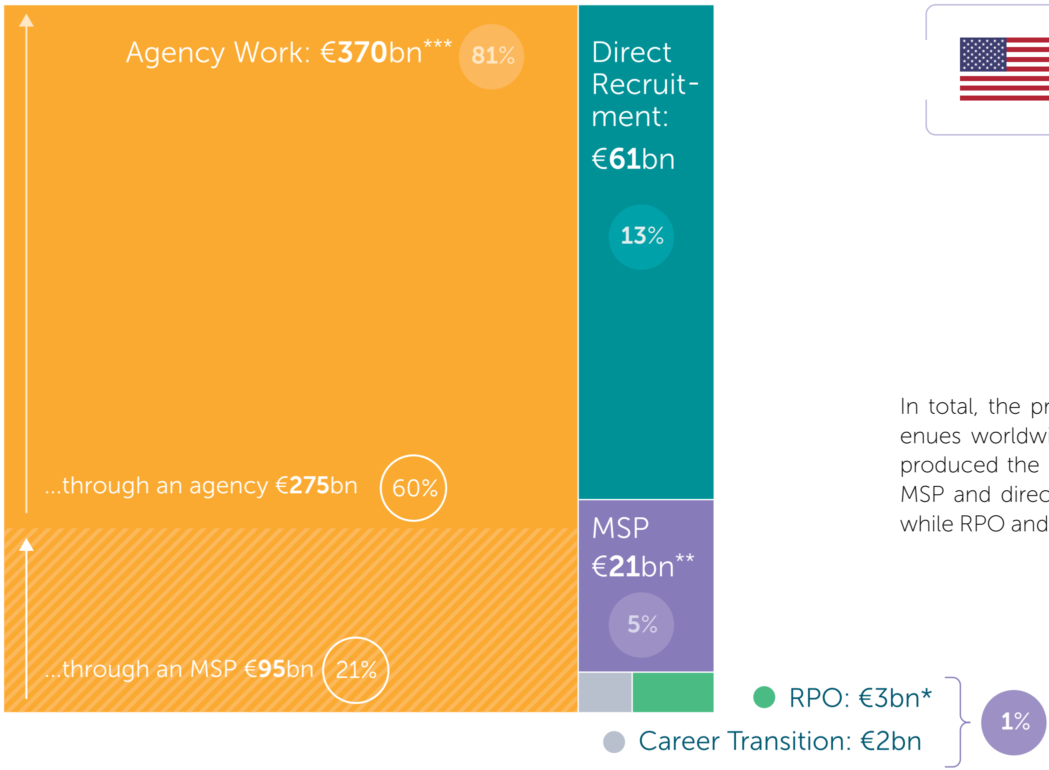
Career transition and Outplacement services, the largest segment of the career management industry, generated an estimated €2 billion in 2017. With sales revenues estimated at €653 million, the USA is the strongest market. The Netherlands and Japan share a distant second place – both at €225 million of estimated sales revenues.

In 2017, private employment industries in 50 countries placed 53 million individuals in employment.

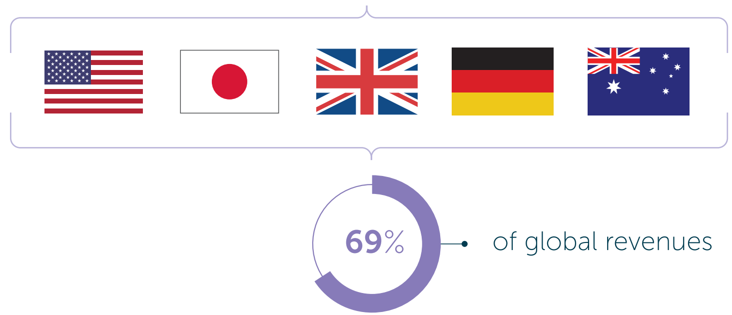
* includes agency work revenue generated through MSPs ** Data from Staffing Industry Analysts *** Data from Everest Group

Private Employment Industry

Private Employment Industry Global Market
2017: **€457bn**



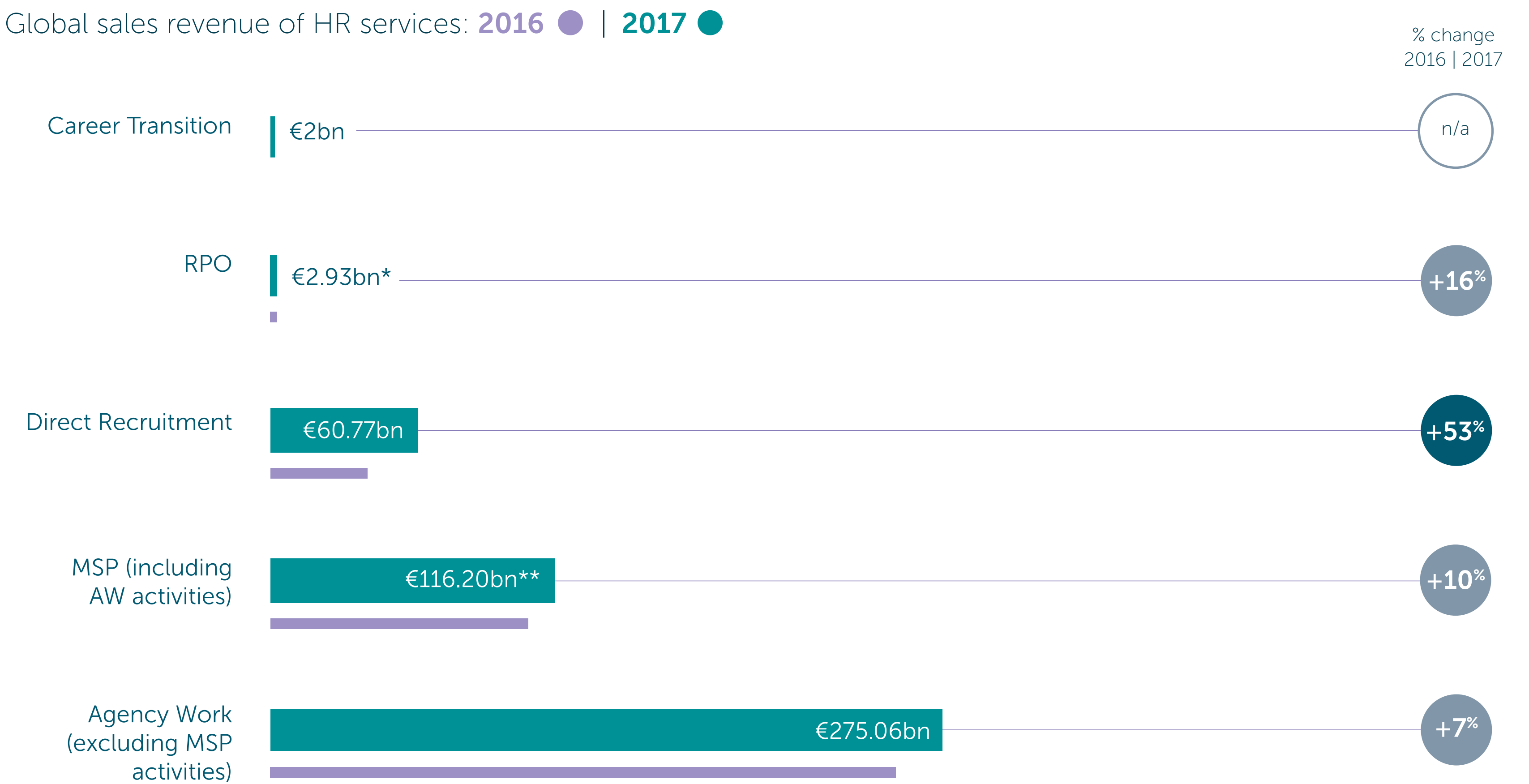
Top 5 Markets (sales revenues)
2017: **€317bn**



In total, the private employment industry generated €457 billion in sales revenues worldwide in 2017. The agency work sector (excluding MSP activities) produced the largest revenue share, accounting for 60% of the entire market. MSP and direct recruitment had a revenue share of 5% and 13% respectively, while RPO and career transition together generated a little above 1% of the total.

* Data from Everest Group ** Data from Staffing Industry Analysts
***Around 80% of MSP activities are comprised of agency work. This is represented in the split of agency work revenues.

All HR services report market growth



* Data from Everest Group ** Data from Staffing Industry Analysts

Overall, the market for private employment services grew organically in 2017, with increases in market size being reported for all services across the board. Combined sales revenues from the services represented - agency work, direct recruitment, career transition as well as Recruitment Process Outsourcing (RPO) and Managed Services Providers (MSP) - is up 13% compared to 2016.

Agency work still accounts for the major share of the industry, with sales revenues amounting to €275 billion (MSP activities excluded), 60% of total revenue. In 2017, global sales revenues from the agency work sector grew by 7%.

The MSP market is the second largest segment of the private employment industry, having surpassed the €100 billion mark and reached €116 billion in 2017 - an annual increase of nearly 10%.* It must be noted that a large share of MSP activity is agency work.**

Data collected indicates that direct recruitment services have seen the most pronounced increase in sales revenue, up more than 50% and reaching €61 billion on a global scale.

Outsourcing of recruitment processes (RPO) has generated a global revenue of nearly €3 billion in 2017, up more than 16% since 2016.***

The global market size of the career management industry, the lion's share of which consists of career transition and outplacement services, is estimated at €2 billion as of 2017.

The share of agency work in the global private employment services industry has remained relatively stable at around two-thirds over the past three years. Direct recruitment has gained traction in 2017, contributing 13% of global sales revenue for the entire industry, compared to around 8% in the previous two years. MSP has also increased its share of total industry revenue, having surpassed 25% as of 2017. Despite positive growth rates, RPO and career management services' total market share remains small, largely as a result of their small base.

* Data from Staffing Industry Analysts ** Consult methodology section for more detail. *** Data from Everest Group

Number of service providers is rising

As of 2017, there were close to 165,000 private employment agencies operating around the globe, providing various HR services to companies wishing to focus on their core activities. This represents an increase of 16% compared to 2016.

Nearly half of all service providers in the private employment industry are work agencies. Across the globe, more than 77,000 such agencies provide staff to client companies, up 22% since 2016.

At more than 52,000, a significant share of agencies operate in the field of direct recruitment.

As the world of work is continually changing and demand for flexibility is growing amongst both employers and employees, the services provided by private employment agencies are increasingly sought after.

The number of internal staff working within private employment agencies reached 2.7 million in 2017, a significant expansion compared to the year before.

Note: The number of private employment agencies presented here is based solely on information collected from members of the World Employment Confederation. The actual number of service providers around the globe is likely higher, as data is not collected for every country.

* The increase is largely attributed to the development of the private employment industry in Japan, China and Russia.

53 million people were placed in the labour market in 2017

Agency work headcounts

USA	15,500,000
China	8,930,000
Brazil	7,800,000
Japan	4,943,952
France	2,600,000
India	2,100,000
Germany	1,032,238
Poland	863,825
Netherlands	856,638
Spain	708,613
Italy	684,000
Belgium	656,281
Colombia	461,041
Switzerland	364,941
Australia	344,900
Chile	180,000
Mexico	170,613
Sweden	168,000
Czech Republic	166,000
Portugal	166,000
Ireland	130,000
Hungary	124,576
Denmark	120,000
Norway	105,000
Austria	91,411
Romania	57,338
Finland	53,291
Argentina	49,991
New Zealand	40,600
Russia	34,300
Greece	29,800
Luxembourg	26,145
Croatia	18,000
Bulgaria	10,032
Estonia	5,500
Turkey	1,000

In 2017, the private employment services industry placed more than 53 million people in employment relationships, thereby actively contributing to positive labour market outcomes around the world. The vast majority of employment relationships were created through agency work, with around 49 million agency workers having found jobs through the industry. Compared to 2016, the number of people who worked for a temporary work agency has increased by 19.5%. With 15.5 million individuals having found work in the USA through the services provided by the private employment industry, the USA is at the top of the list, followed by China, Brazil, Japan and France.

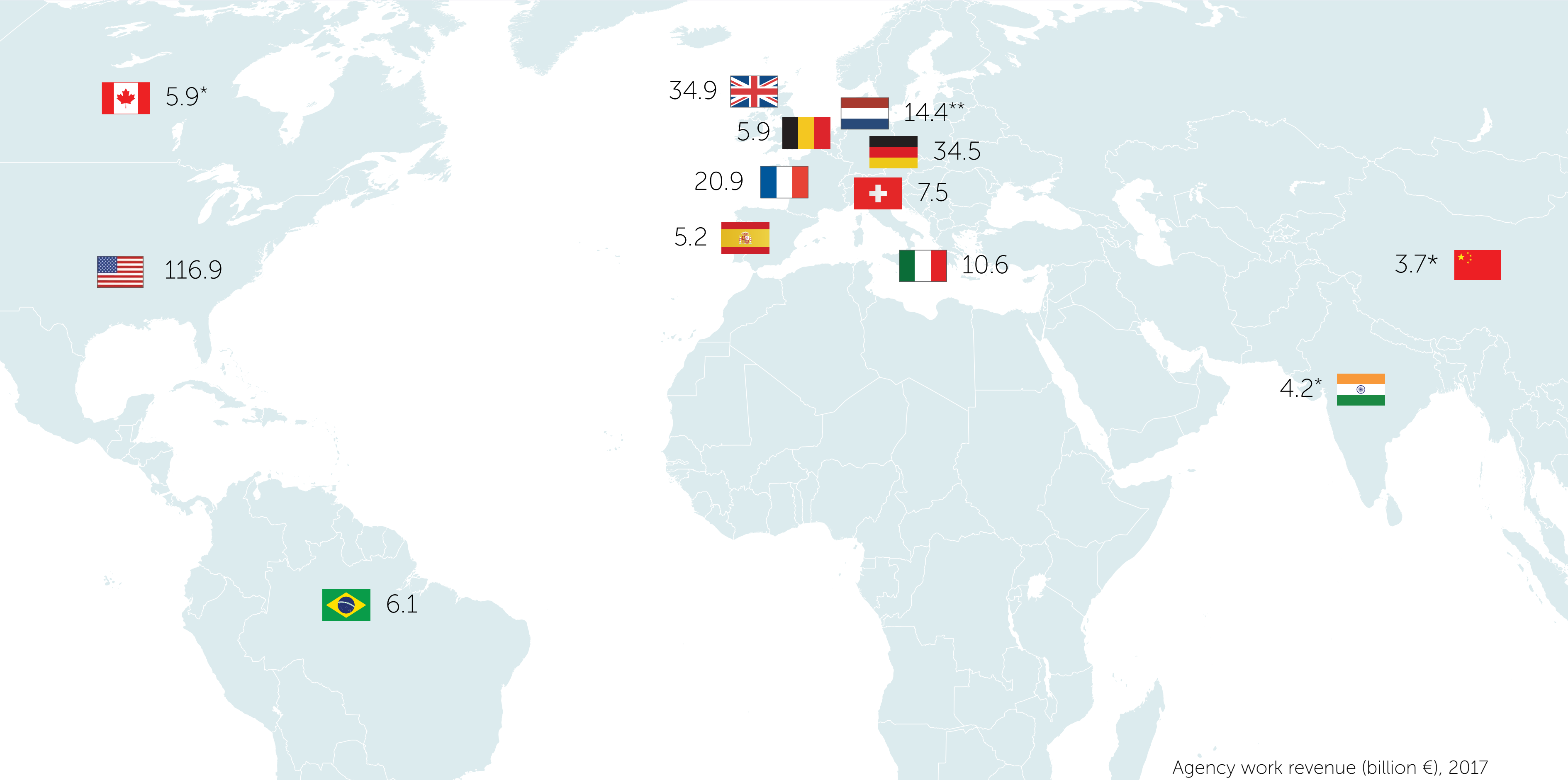
Number of people placed by private employment agencies globally:
53 MILLION

Number of placements through direct recruitment:
3.8 MILLION

Number of placements through temporary work agencies:
49 MILLION

Note: The number of placements presented here is based solely on information collected from members of the World Employment Confederation. The actual number of placements around the globe is likely higher, as data is not collected for every country.

USA remains largest market for agency work



Agency work revenue (billion €), 2017

USA	Japan	UK	Germany	France	Australia	Netherlands	Italy	Switzerland	Brazil	Canada	Belgium	Spain	India	China
116.9	53.6	34.9	34.5	20.9	16.4	14.4	10.6	7.5	6.1	5.9	5.9	5.2	4.2	3.7

* Data from Staffing Industry Analysts ** Estimation conducted by ABU based on CBS figures

The USA is by far the largest market of the global agency work industry when consulting annual sales revenue figures. The market in the USA generated nearly €117 billion in 2017. With around €54 billion of annual sales revenue and a growth in revenue of 22%, Japan is a distant second, followed by the UK (€35 billion), Germany (€34.5 billion) and France (€21 billion). Eight European countries are represented in the top 15 markets for sales revenue within the agency work sector, all of which have experienced positive growth. Belgium is at the forefront with a year-on-year increase of 48%. Supported by national regulation favourable to agency work, Brazil has also made the cut and landed in tenth place of the global market rankings, having reached €6 billion in revenues.

Looking back further over agency work revenue, most of the 15 largest markets measured have grown over the past three years. India, one of the fastest growing economies, benefits from the second largest workforce worldwide and the agency work sector has expanded significantly since 2014, with annual revenue figures up almost 250%. Spain and Italy have experienced revenue increases of 98% and 70% respectively between 2014 and 2017, and similar trends are observed in Germany (44%), France (24%), the Netherlands (30%) and Switzerland (30%). The UK agency work market, while having grown by 10% in 2017, is still recovering from its 2016 slump, when revenues dropped by 27%, potentially as a result of the Brexit referendum.

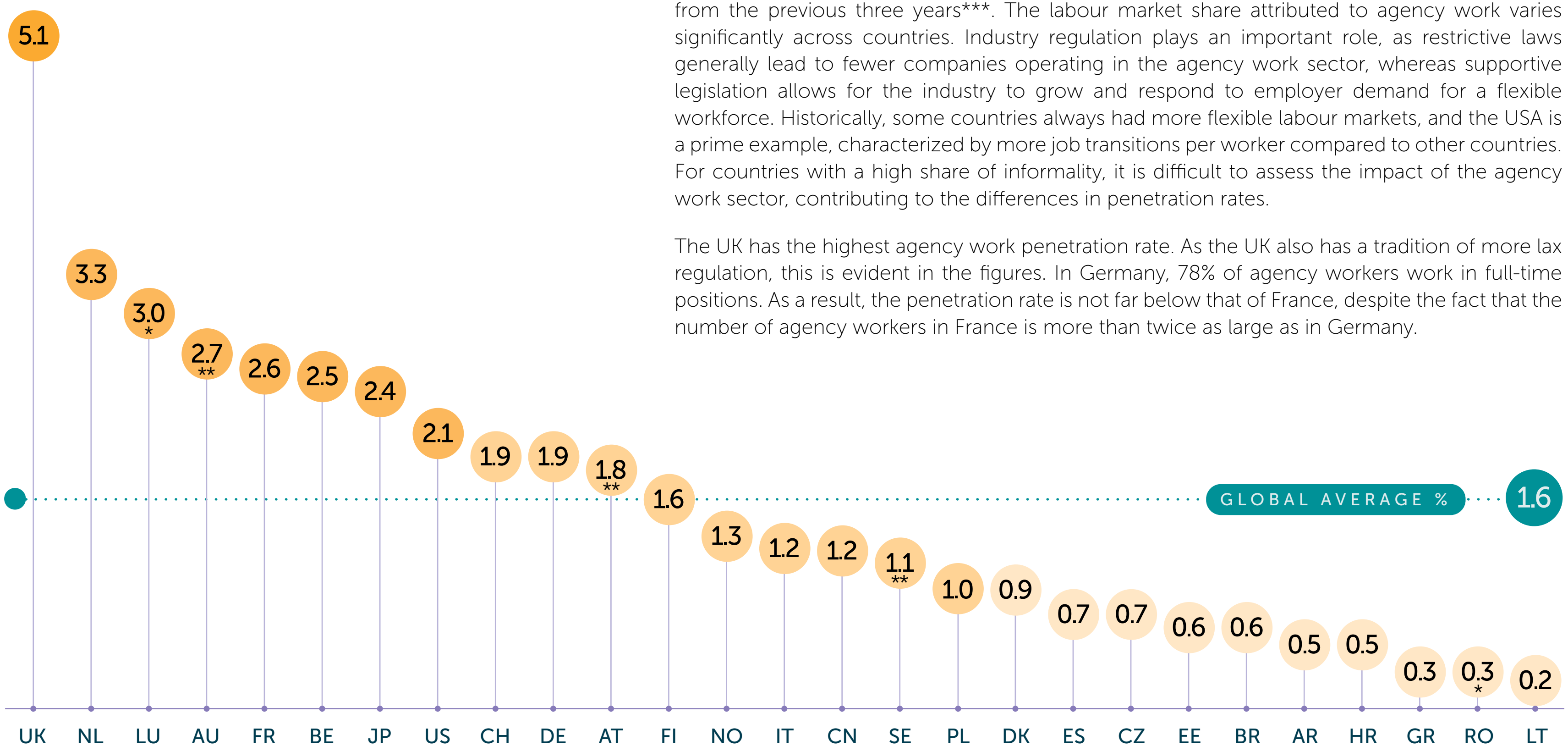
Moving away from Europe, markets in North America are following different trends, with the Canadian market having gradually contracted between 2014 and 2017 (-58%), whereas the US agency market gained 24% in sales revenue over the same three year period.

Agency work penetration rate remains stable

Agency work penetration rate, 2017 %

In 2017, the global average penetration rate for the agency work sector was 1.6%, unchanged from the previous three years***. The labour market share attributed to agency work varies significantly across countries. Industry regulation plays an important role, as restrictive laws generally lead to fewer companies operating in the agency work sector, whereas supportive legislation allows for the industry to grow and respond to employer demand for a flexible workforce. Historically, some countries always had more flexible labour markets, and the USA is a prime example, characterized by more job transitions per worker compared to other countries. For countries with a high share of informality, it is difficult to assess the impact of the agency work sector, contributing to the differences in penetration rates.

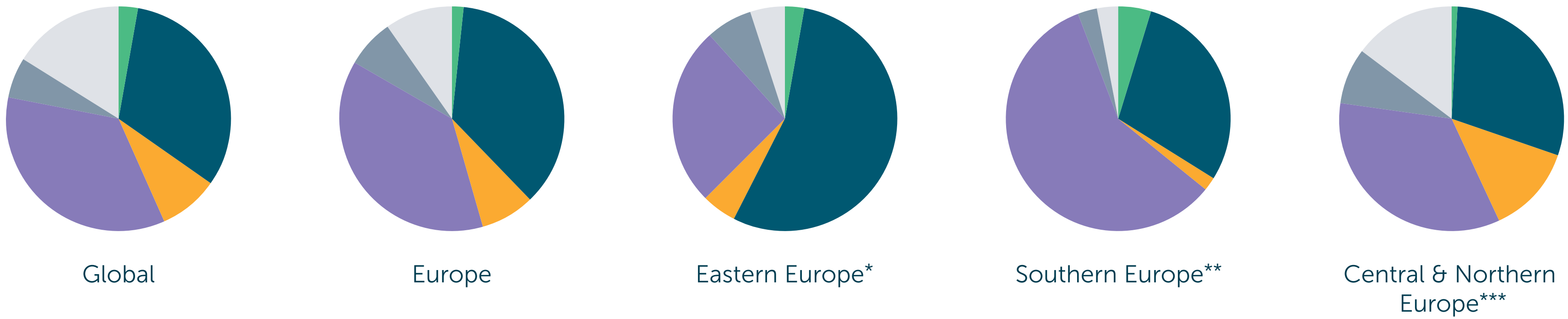
The UK has the highest agency work penetration rate. As the UK also has a tradition of more lax regulation, this is evident in the figures. In Germany, 78% of agency workers work in full-time positions. As a result, the penetration rate is not far below that of France, despite the fact that the number of agency workers in France is more than twice as large as in Germany.

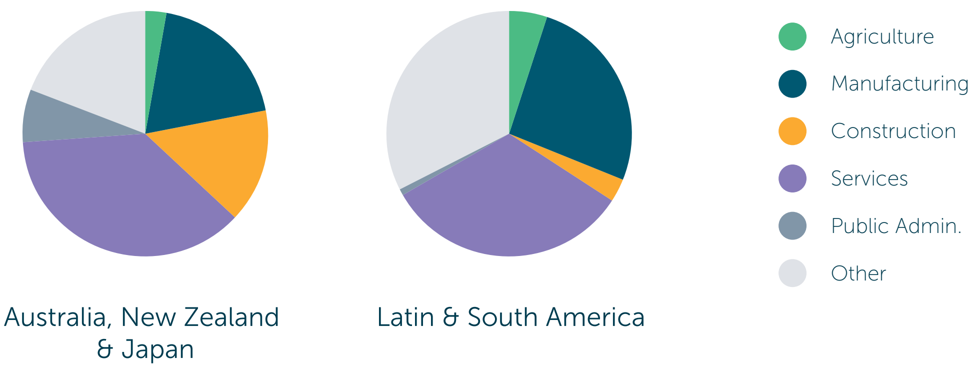


* 2016 data ** Data from Staffing Industry Analysts *** For more information on the definition for penetration rate consult the Annex

Majority of agency workers are employed in services industry

Sectoral distribution of agency workers across regions





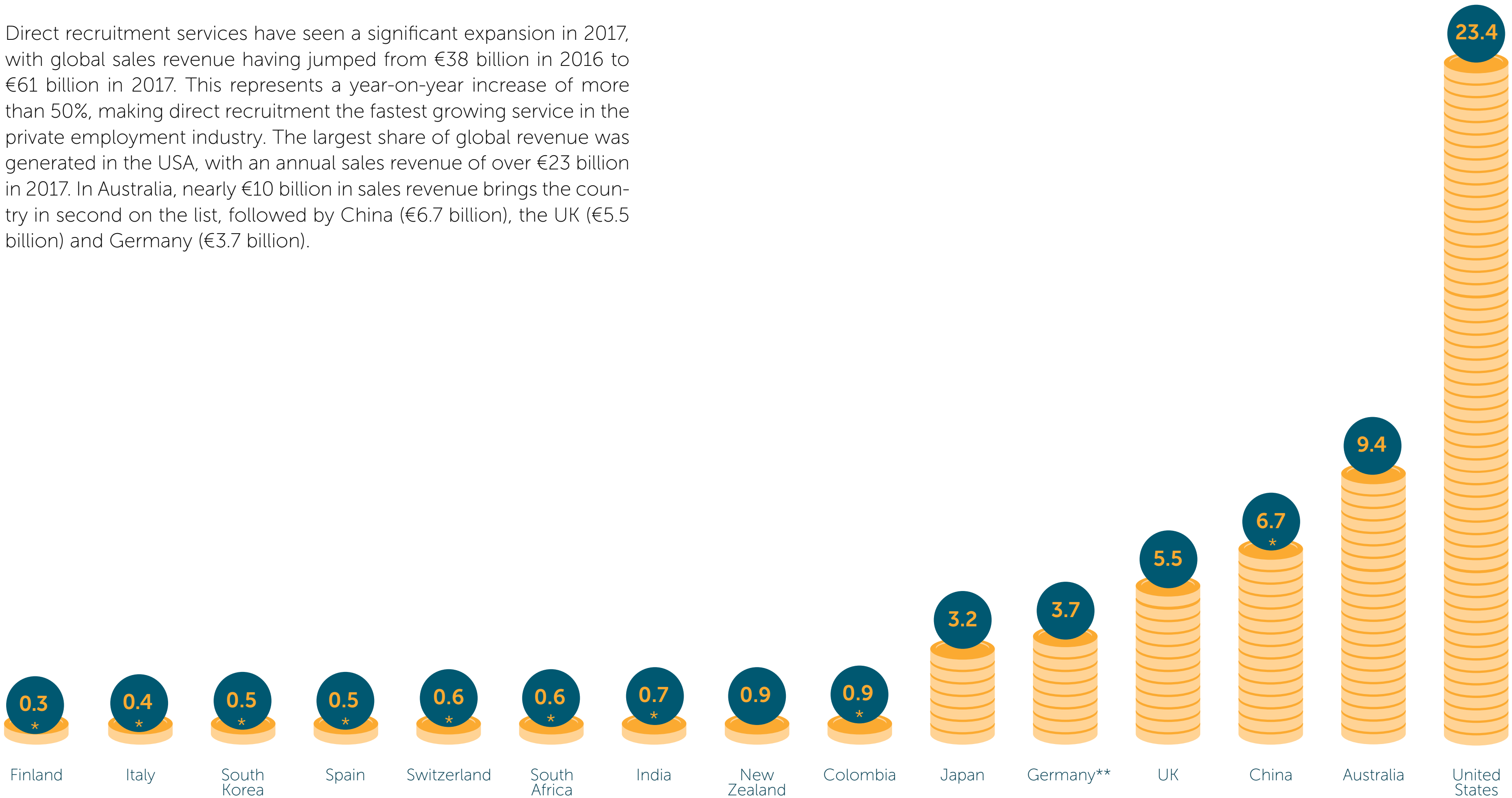
The global trend is that employment in agriculture is gradually declining, with manufacturing taking over in developing and emerging countries and the services sector capturing an increasingly large share of the workforce in the developed world. These trends are visible in the sectoral distribution of agency workers as well. Globally, and within most regions, the services sector is the one that employs the largest share of agency workers. In Eastern Europe, the share of manufacturing is higher than that of the services sector, whereas the opposite is true for countries in Central and Northern Europe. Similarly, the share of agency workers employed in the agricultural and manufacturing sectors is higher in Latin and South America compared to Australia, New Zealand and Japan.

* Croatia, Czech Republic, Poland, Russia ** Italy, Spain, Portugal, Greece *** Belgium, France, Germany, Netherlands, Norway, Switzerland

Direct recruitment experiences the strongest growth rate

Direct recruitment turnover in the 15 largest markets (billion €), 2017

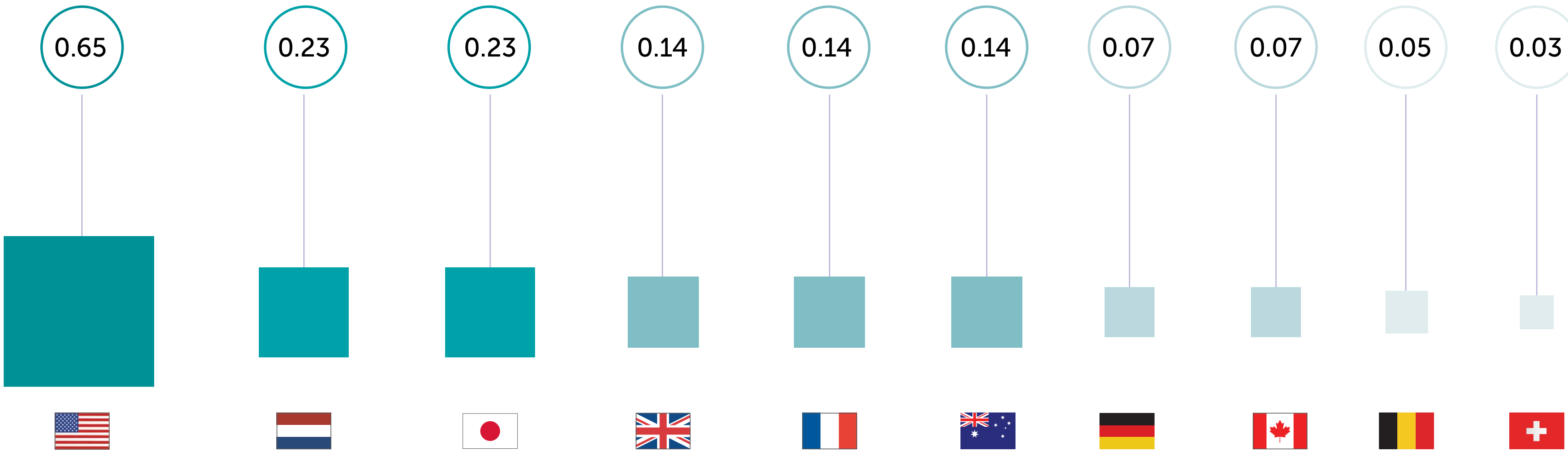
Direct recruitment services have seen a significant expansion in 2017, with global sales revenue having jumped from €38 billion in 2016 to €61 billion in 2017. This represents a year-on-year increase of more than 50%, making direct recruitment the fastest growing service in the private employment industry. The largest share of global revenue was generated in the USA, with an annual sales revenue of over €23 billion in 2017. In Australia, nearly €10 billion in sales revenue brings the country in second on the list, followed by China (€6.7 billion), the UK (€5.5 billion) and Germany (€3.7 billion).



* Data from Staffing Industry Analysts ** Data for 2016

USA and Europe lead market for career transition & outplacement

Career transition/Outplacement revenues in top 10 markets (billion €), 2017*

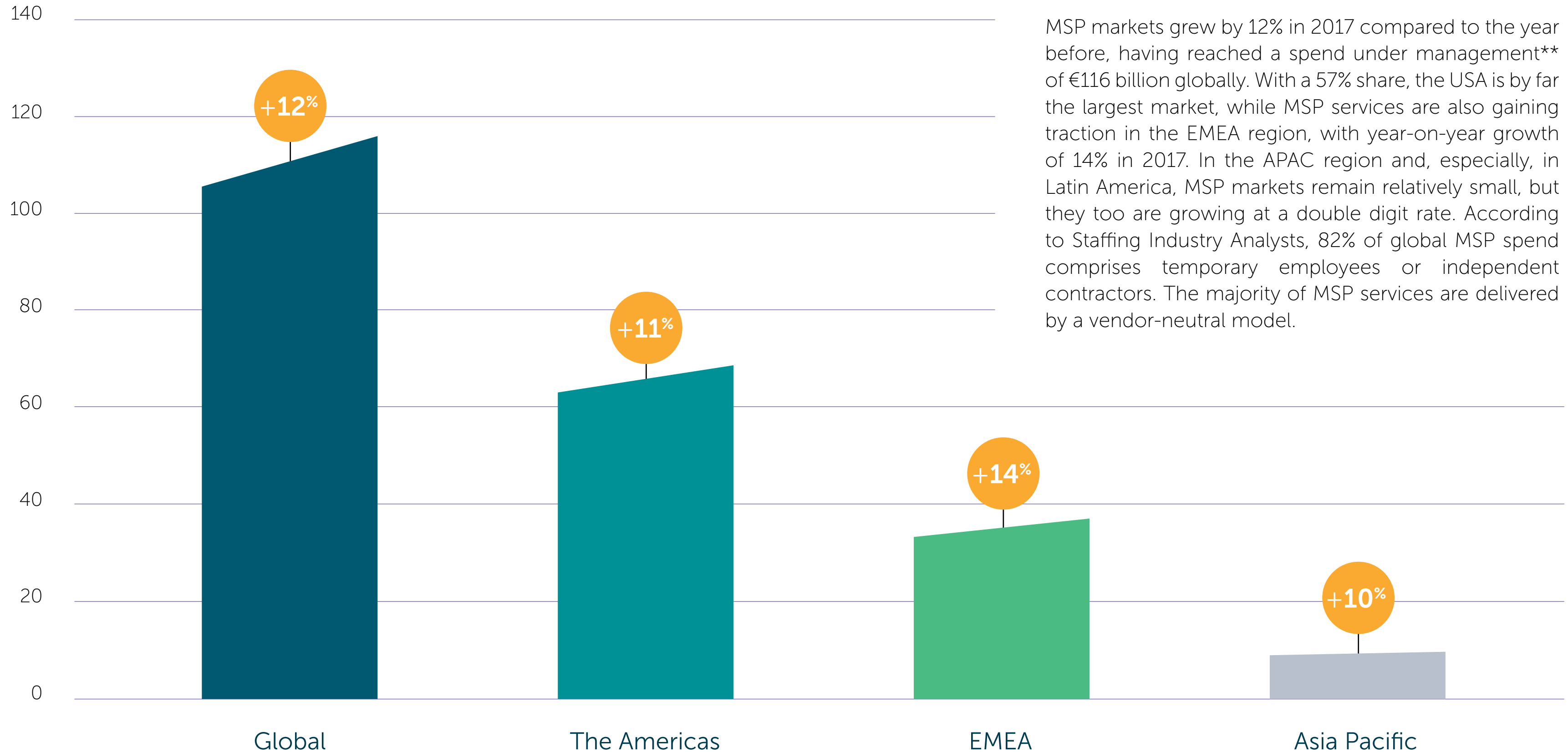


Based on estimations by members of the World Employment Confederation, the career transition and outplacement services sector (the major segment within the career management industry) reached €2 billion at global level in 2017. Europe and North America account for the largest share of revenues, each region contributing a little above €0.7 billion to the total figure. The USA is the largest market with its sales revenues representing 35% of the global figure. Europe's top markets are: the Netherlands (€0.23 bn), the UK (€0.14 bn), France (€0.14 bn), Germany (€0.07 bn) and Belgium (€0.05 bn). Turning to the APAC region, Japan and Australia are also strong markets with sales revenues for career transition and outplacement services at €0.23 billion and €0.14 billion respectively.

* Based on estimations conducted by members of the World Employment Confederation

Managed Services Providers (MSP) record double digit growth across regions

MSP market size, spend (billion €), 2017 - % y-o-y Change*

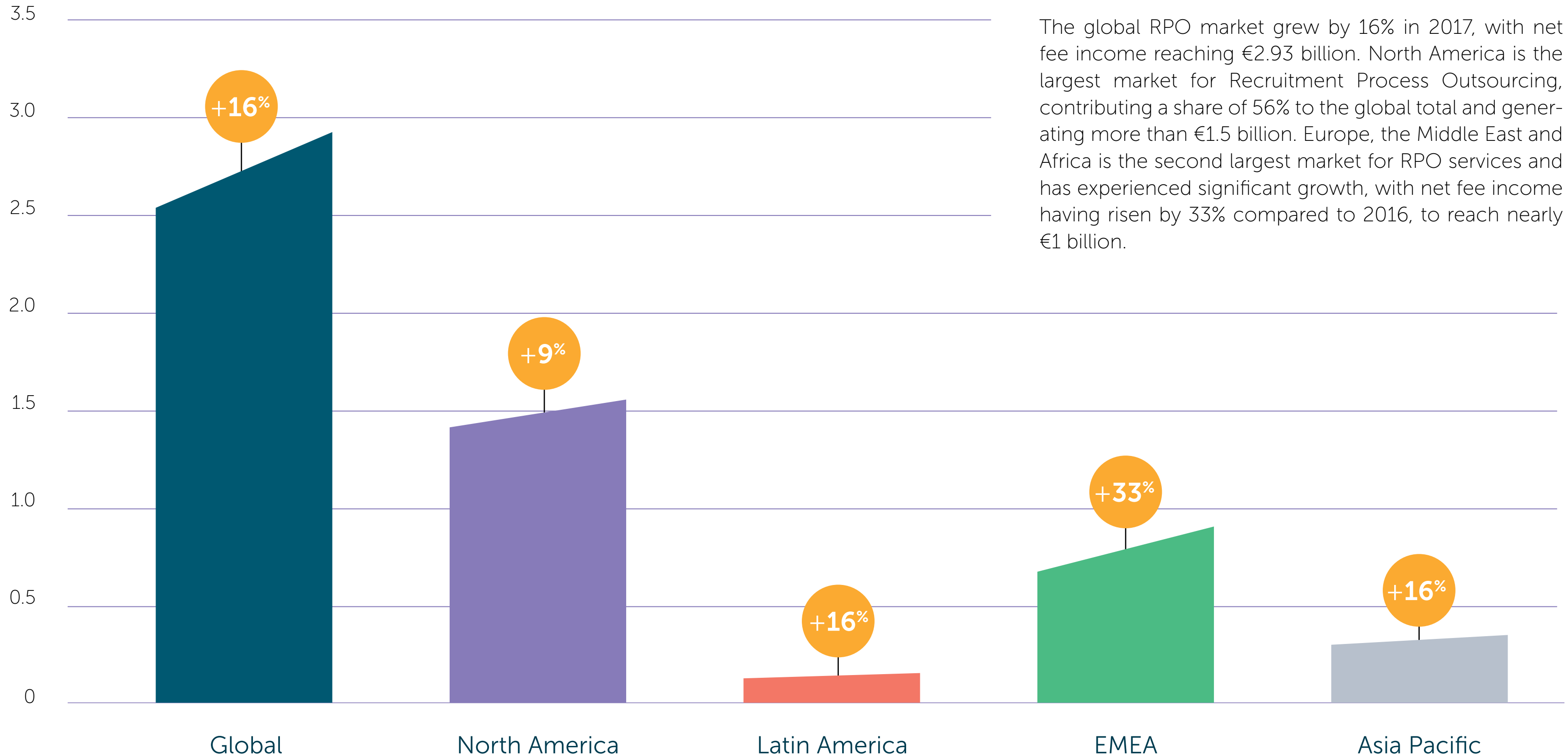


MSP markets grew by 12% in 2017 compared to the year before, having reached a spend under management** of €116 billion globally. With a 57% share, the USA is by far the largest market, while MSP services are also gaining traction in the EMEA region, with year-on-year growth of 14% in 2017. In the APAC region and, especially, in Latin America, MSP markets remain relatively small, but they too are growing at a double digit rate. According to Staffing Industry Analysts, 82% of global MSP spend comprises temporary employees or independent contractors. The majority of MSP services are delivered by a vendor-neutral model.

* Data from Staffing Industry Analysts ** The amount of currency actually invoiced by suppliers in an MSP relationship. Source: Staffing Industry Analysts.

EMEA drives strong growth in Recruitment Process Outsourcing (RPO)

RPO market size, net fee income (billion €), 2017 - % y-o-y Change*



The global RPO market grew by 16% in 2017, with net fee income reaching €2.93 billion. North America is the largest market for Recruitment Process Outsourcing, contributing a share of 56% to the global total and generating more than €1.5 billion. Europe, the Middle East and Africa is the second largest market for RPO services and has experienced significant growth, with net fee income having risen by 33% compared to 2016, to reach nearly €1 billion.

* Data from Everest Group

North America: USA maintains top rank

Placements
15.7
MILLION

Private Employment Agencies:
21,285

Internal Staff
406,000

Countries included in figures:

- Canada
- Mexico
- USA

Agency Work Revenue
€124
BILLION***

MSP Revenue
€70.3
BILLION*

Direct Recruitment Revenue
€23.7
BILLION

RPO Revenue
€1.6
BILLION**

The USA is by far the largest market globally and dominates the North American market, where it contributes to nearly 95% of revenues produced in the agency work sector. The Canadian market has remained relatively stable in 2017, generating €5.9 billion in agency work revenues. This figure is still 58% down on 2014. The Mexican market remains small, although growth is positive and in double digits for 2017, with agency work revenue up 13% year-on-year. Turning to MSP, the USA is the largest market worldwide, with an annual spend of €65 billion in 2017.

* Data from Staffing Industry Analysts ** Data from Everest Group *** Including MSP revenue generated by agency work

South America: Brazil grows three-fold

Countries included in figures:

- Argentina
- Brazil
- Chile
- Colombia
- Peru

Placements
8.6
MILLION

Private Employment Agencies:
10,284

Internal Staff
116,000

Agency Work Revenue
€9.3
BILLION***

MSP Revenue
€1.3
BILLION*

Direct Recruitment Revenue
€1.1
BILLION

RPO Revenue
€0.15
BILLION**

In South America, Brazil is the largest market, having experienced significant growth in the agency work sector. On a global level, Brazil is the tenth-strongest performing market. Partly explained by new national regulations favorable to the employment sector, the Brazilian market has jumped from €1.9 billion in 2016 to €6 billion in 2017.

* Data from Staffing Industry Analysts ** Data from Everest Group *** Including MSP revenue generated by agency work

Europe: Italy and Spain see market boost

Placements
10.8
MILLION

Private Employment Agencies:
80,497

Internal Staff
502,000

Agency Work Revenue
€153
BILLION**

MSP Revenue
€31.1
BILLION*

Direct Recruitment Revenue
€13.9
BILLION

Countries included in figures:

Austria	Lithuania
Belgium	Luxembourg
Bulgaria	Netherlands
Croatia	Norway
Czech Rep.	Poland
Denmark	Portugal
Estonia	Romania
Finland	Russia
France	Slovakia
Germany	Slovenia
Greece	Spain
Hungary	Sweden
Ireland	Switzerland
Italy	Turkey
Latvia	UK

In Europe, the UK is the largest market, generating 23% of agency work revenue in 2017, closely followed by Germany which was responsible for 22.5%. France and the Netherlands represent 14% and 9% of the European agency market, respectively. Overall, eight of the largest fifteen agency work markets globally are located in Europe. While most European markets have experienced positive market growth rates, Spain and Italy have seen a particularly impressive market boost, with revenue between 2014 and 2017 up 98% and 70% respectively.

* Data from Staffing Industry Analysts ** Including MSP revenue generated by agency work

APAC: Direct recruitment market gets particularly strong

Countries included in figures:

- Australia
- China
- India
- Japan
- New Zealand
- South Korea

Placements
15.6
MILLION

Private Employment Agencies:
48,197

Internal Staff
1.6
MILLION

Agency Work Revenue
€79.3
BILLION***

MSP Revenue
€9.8
BILLION*

Direct Recruitment Revenue
€21.4
BILLION

RPO Revenue
€0.35
BILLION**

Japan, Australia and China are among the fifteen largest agency work markets globally and among the top five largest direct recruitment markets. Within the region, Japan is the strongest-performing market with private employment services revenue of €57 billion in 2017. When focusing on direct recruitment services and MSP, Australia is very strong, with market sizes of €9.4 billion and €4.9 billion respectively. Considering the size of the population in relation to that of China, which is the second-largest direct recruitment market (€6.7 billion), this illustrates the maturity of the Australian market.

* Data from Staffing Industry Analysts ** Data from Everest Group *** Including MSP revenue generated by agency work

Glossary of Terms Used and Acronyms

Agency Work

Agency work is a triangular employment relationship, defined in ILO Convention 181 as: "Services consisting of employing workers with a view to making them available to a third party, who may be a natural or legal person ("user enterprise") which assigns their tasks and supervises the execution of these tasks". It can be named as Dispatched Labour in Asia, Labor Hire in Africa or Temporary Staffing in the USA.

Career Management

Main service segments are individual outplacement services, executive outplacement services, group outplacement services and other employment transition services. In these segments, outplacement services companies provide a range of employment and career services. These include resume writing, interview skills, job search strategies, coaching and career guidance. Employers generally pay all of the costs associated with these services.

Daily Average Number of Agency Workers (in FTEs)

Total number of hours worked by all agency workers in a country over a period of one year divided by the average number of hours worked over a period of one year by a worker with a full-time job with an open-ended contract.

Direct Recruitment

Services for matching offers of and applications for employment, without the private employment agency becoming a party to the employment relationships which may arise therefrom (Source: ILO Convention 181), including executive search & selection.

Managed Services Provider (MSP)

MSP is a service whereby a company takes on primary responsibility for managing an organization's contingent workforce program. Typical responsibilities of an MSP include overall program management, reporting and tracking, supplier selection and management, order distribution and often consolidated billing. The vast majority of MSPs also provide their clients with a vendor management system (VMS) and may have a physical presence on the client's site. An MSP may or may not be independent of a staffing supplier.

Penetration Rate

Daily average number of agency workers [in full-time equivalents] divided by the working population [as defined by the ILO as follows: "The employed comprise all persons of working age who during a specified brief period, such as one week or one day, were in the following categories: a) paid employment (whether at work or with a job but not at work); or b) self-employment (whether at work or with an enterprise but not at work)."

Private Employment Services / Employment Industry

Agency work is usually one of several other HR services provided by recruitment and employment agencies, along with direct recruitment, career management, RPO & MSP. The collective name for these services is private employment services. The employment agency provides a professional service to a user company by taking over (a part of) the recruitment and HR process. In this sense, private employment services are comparable to other professional and business services such as auditing & accounting, communications & marketing, facilities management etc.

Recruitment Process Outsourcing (RPO)

A service by a third-party specialist provider, to assume the role of the client's recruiting department by owning and managing part or all of its recruitment process and related recruitment supply chain partner relationships, provide the necessary skills, activities, tools, technologies, and process methodologies.

Methodology

The data presented in this report is for the calendar year 2017. Sources vary depending on the data, but the majority of the figures are collected by the World Employment Confederation from its national federation members. This is primarily the case for the agency work market. Some national federations gather data directly from their respective members, whereas others contribute by collecting data from public sources or research partner institutions. The World Employment Confederation also partners with Staffing Industry Analysts, allowing for a more complete assessment of the industry across different HR services (e.g. MSP). The figures on the RPO market originate from Everest Group. Whenever a figure did not come directly from members of the World Employment Confederation, it is indicated by a footnote.

For the calculation of the total global market size of the private employment services industry, five service segments have been included: agency work, direct recruitment, MSP, RPO and career transition services. Due to the fact that a major share of MSP activities are agency work, there exists an overlap of revenue figures across these two segments. Therefore, for the assessment of the global market size to be more accurate, 82% of global MSP revenue has been subtracted from the sum of revenues of the five service segments.

For the 2019 edition of the Economic Report, the methodology in calculating the market size of the various services has been updated. Figures reported in previous editions of the report are therefore not to be compared with figures in the current version.

It must be noted that some figures presented in this report may be underestimating the true picture, since the World Employment Confederation does not have members in every country providing statistics. This is specifically the case for the number of agencies and internal staff. Note also that a lack of information on specific countries does not mean that private employment services are not provided in that country.

In case of general or specific questions on the methodology, please contact Robin Lechtenfeld, Labour Market Intelligence Officer at the WEC Head Office (robin.lechtenfeld@wecglobal.org).

Members of the World Employment Confederation

National Federations

NORTH AMERICA

Canada (CA)
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USA (US)

LATIN AMERICA

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Brazil (BR)
Chile (CL)
Colombia (CO)
Peru (PE)

AFRICA

Morocco (MA)
South Africa (ZA)

NORTH EAST ASIA

China (CN)
Japan (JP)
South Korea (KR)

APAC SOUTHERN

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India (IN)
Indonesia (ID)
New Zealand (NZ)
Philippines (PH)
Singapore (SG)
Vietnam (VN)

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