

# Global Recruitment Market Report: 2013 Edition

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## Abstracts

The recruitment market varies considerably from one country to another with the US, Japan and the UK showing the highest degree of fragmentation. The recruitment market can be segmented into general and professional staffing markets. General staffing that includes low skilled, low wage blue collar employees has a larger share as compared to professional staffing that includes higher skilled, higher wages white collar employees. North America represented the single largest market measured in terms of revenues in 2012 followed by Japan, the UK, France and Germany.

The trend of consolidation in staffing industry is increasing especially in fragmented markets due to several factors. Labor force participation has fallen dramatically worldwide especially in the EU region and this trend is expected to increase further on account of long-term unemployment and weak economic outlook. Income growth has also come under pressure from rising unemployment, putting downward pressure on real wages in many advanced economies. Overall sources of new employment opportunities will remain limited and diverse, adding complexity in labor market of advanced economies. The current situation of high uncertainty makes firms reluctant to open vacancies or to hire workers.

Most of the mergers and acquisitions that took place in 2012 involved middle sized staffing firms as they proved to be attractive acquisition targets, offering geographic coverage and differentiated services. People are increasingly using social media to network and identify employment opportunities. The trend of RPOs (recruitment process outsourcing) is becoming more popular as more and more medium and large-sized organizations are outsourcing their recruitment process right from the entry level jobs to high level jobs. Deregulation in temporary agency work in countries like Japan, Netherlands, Germany and Spain for equal pay has brought positive changes in overall recruitment market.

Moreover, the global recruitment market is fiercely competitive and highly fragmented with numerous players vying for market share. The leading four companies account for about one-fifth of the total revenues of the industry. Adecco Group is the largest company operating in this industry, followed by Randstad and Manpower. The present report profiles these four companies along with a discussion of their respective business strategies.

The report provides a comprehensive overview of the global staffing industry along with the coverage of major regional markets like North America (the US and Canada), Europe (France, Germany, Italy, the UK, Spain, Sweden and Switzerland), Asia Pacific (Australia and Japan) and Australia, discussing the market size, segmentation, and employment/unemployment rates.

By combining SPSS Inc.'s data integration and analysis capabilities with our relevant findings, we have predicted the future growth of the industry. We employed various significant variables that have an impact on this industry and created regression models with SPSS Base to determine the future direction of the industry. Before deploying the regression model, the relationship between several independent or predictor variables and the dependent variable was analyzed using standard SPSS output, including charts, tables, and tests.

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