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AN INDUSTRY REPORT

The Background Screening Buyer Report.

The quiet economics of background screening vendor relationships, and why 3 in 5 HR leaders stay with providers they don't trust.



59%

of HR leaders aren't loyal to their screening vendor.

81% have stayed with that vendor for three or more years anyway. The reasons they stay are structural, not enthusiastic.

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THE ARGUMENT

In most vendor categories, dissatisfaction produces churn. In this one, it produces tenure.

Most HR leaders aren't loyal to their screening vendor. Most stay anyway. Three in five describe the relationship as something other than loyalty (satisfied-but-open, indifferent, or actively looking), and four in five have nevertheless been with that vendor for three or more years. The gap between how the relationship is described and how long it has lasted is not small, and it is not accidental.

This report is about the mechanics of that gap: what HR leaders say they expect from a screening partner, what they actually pay for, where promises made during the sales process hold up and where they don't, and what keeps a dissatisfied buyer in the seat. The category's steady tenures look like loyalty from the outside. Read from the inside, they look like something closer to inertia: engineered, priced in, and quietly load-bearing for providers whose growth depends on it.

59%
aren't loyal to their current provider

58%
say a sales promise didn't hold up post-sale

75%
are open to evaluating a new provider in 12 months

81%
have stayed with the same vendor 3+ years anyway

INSIDE

Stuck by design
Table stakes vs. decision drivers
The promise gap
Where turnaround actually lands
Overbuilt, under-delivering
Open, but not free

ONE: STUCK BY DESIGN

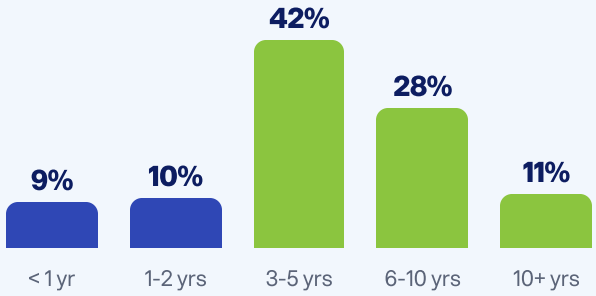
Long tenures. Low loyalty. Exits that cost more than the irritation.

Most HR leaders aren't loyal to their screening vendor. Most stay anyway. In most vendor categories, dissatisfaction produces churn. In this one, it produces tenure.

Four in five buyers have been with the same screening provider for three years or more. Only two in five describe the relationship as loyalty. The rest are satisfied-but-open, indifferent, or quietly looking, and still there. The shape of that contradiction is what the rest of this section takes apart.

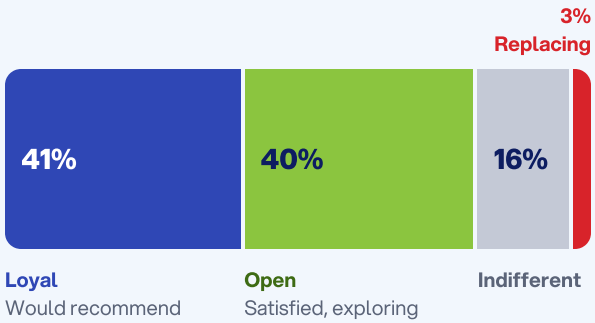
HOW LONG THEY'VE STAYED

81% have been with their provider three or more years.



HOW THEY DESCRIBE THE RELATIONSHIP

Only 41% call it loyalty.



THE LOYALTY ISN'T LOYALTY

68% of buyers who call themselves loyal are still open to evaluating a new screening provider in the next 12 months. Loyalty, measured behaviorally, looks a lot like wait-and-see.

THE TENURE ISN'T LOYALTY EITHER

58% of buyers tenured three years or more don't describe themselves as loyal. Long relationships, in this category, are not evidence of earned trust. They are evidence of structure.

WHY THEY STAY

5% of HR leaders say *nothing* is stopping them from switching screening vendors. The other 95% name cost, contract, transition effort, internal approval, or fear that a new provider won't live up to its promises. Long tenure, in this category, is not a signal of a relationship working. It is a signal of a relationship that is expensive to end.

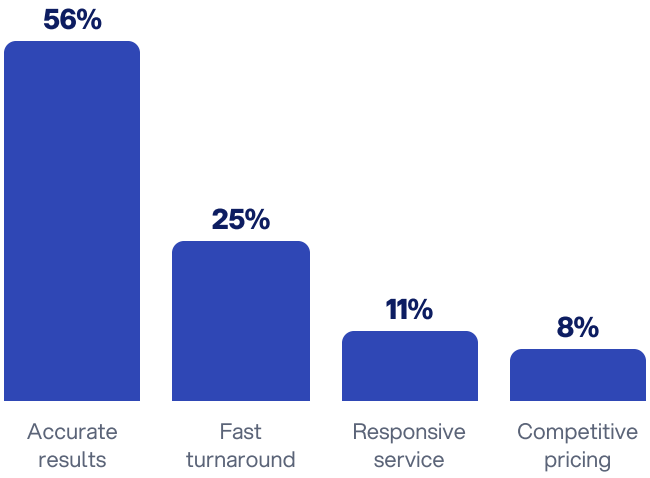
TABLE STAKES VS. DECISION DRIVERS

02 What HR leaders expect, and what they actually decide on.

When we asked what HR leaders expect from any screening vendor as a baseline (and, separately, what actually drives their choice to stay or switch), the two lists diverge. Accuracy dominates minimum expectations: **56%** rank it first. Price ranks last; only **8%** name it the most-expected attribute. But the picture of what actually drives the decision looks almost upside-down: platform usability, customer relationship, and compliance guidance lead, and price shows up seventh out of eight.

MINIMUM EXPECTATIONS n=153

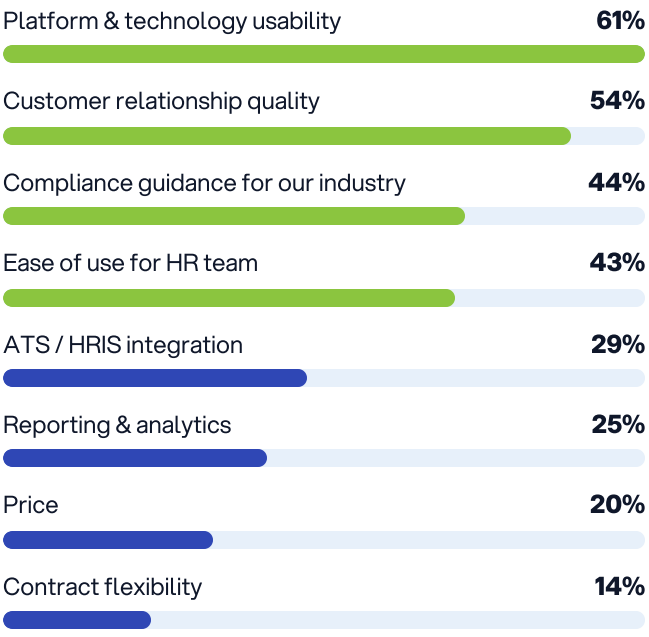
Table stakes, ranked (% who ranked #1)



Accuracy is the clear first-ranked expectation. Price is ranked last among the four baseline attributes, a pattern that holds in the decision-driver data on the right.

DECISION DRIVERS n=153

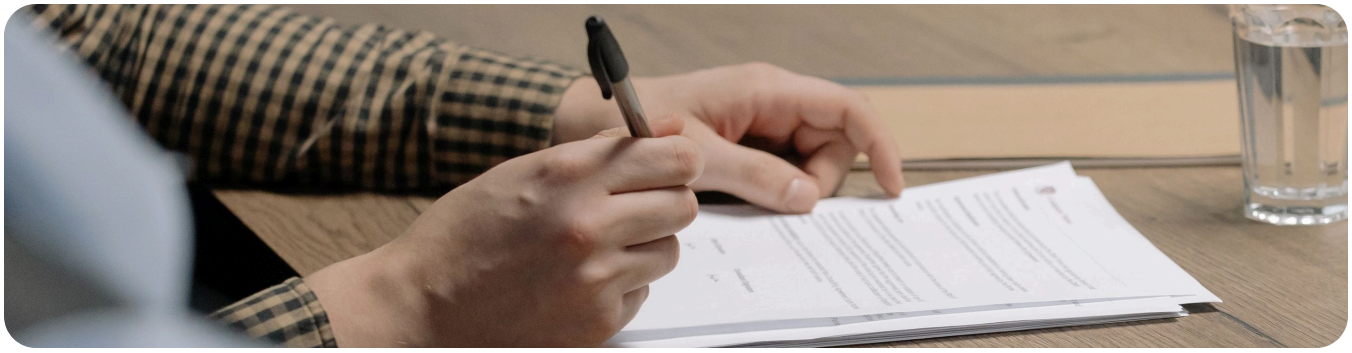
What actually shapes the choice (% in top 3)



> **Price ranks as a top-3 decision driver for just 20% of buyers, and is named the *least* expected deliverable by 50% of them. In this category, buyers don't choose on price, and they don't expect to.**

THE GAP BETWEEN SALES PROMISE AND DELIVERY

03 What sales promised vs. what got delivered.



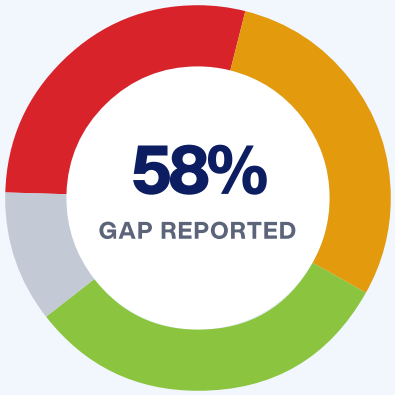
58% of decision-makers have been let down by a sales promise.

We asked whether a screening provider has ever failed to live up to what was promised during the sales process. **29%** said yes, significantly. **29%** said yes, somewhat. **31%** said their provider delivered what was promised. **11%** were unsure or not involved in selection.

That three-in-five figure reframes how category buyers approach every new pitch. And the reaction is measurable: among those who have been let down, **89%** say they are likely to evaluate a new provider in the next 12 months, compared with 75% of the sample overall.

> **58% of respondents carry a prior experience of a sales-delivery gap into their next evaluation. Only 31% can affirm the opposite.**

DID YOUR PROVIDER DELIVER WHAT SALES PROMISED? n=153



Yes, significantly failed to deliver	**29%**
Yes, somewhat failed to deliver	**29%**
No, they delivered what was promised	**31%**
Not sure / wasn't involved in selection	**11%**

Among the **58%** who report a sales-promise gap, **89%** are likely to evaluate a new provider in the next 12 months, a clear lift over the 75% seen across the full sample.

WHERE TURNAROUND TIME ACTUALLY LANDS

04 The turnaround experience, in the respondents' own words and ratings.

Turnaround is the operational variable everyone has an opinion on, and the verbatim answers back that up. When asked for their single biggest frustration, respondents volunteered turnaround time more than any other theme: "slow turnaround time," "time to clear," "length of time to get results from Clark County in NV," "if results are found, the process takes much longer." Nearly half the open-ended verbatims name speed or timeliness directly.

TURNAROUND TIME EXPERIENCE n=153



- **50%** consistently meet our speed expectations
- **28%** usually fast, occasionally fall short
- **15%** turnaround time is a recurring frustration
- **5%** speed directly impacted our hiring timeline
- **1%** turnaround is not a factor for us

20% describe turnaround as **either a recurring frustration or a direct drag on hiring** (15% + 5%). In the open-ended verbatims, however, turnaround surfaces far more often than this number suggests, as a chronic irritation that hasn't yet crossed into a reason to switch.

> **Timeliness, lack of communication and updates, awful candidate experience when they call for updates or have questions.**
>
> HR leader, one of 124 substantive open-ended responses to Q15.

IMPORTANCE VS. PERFORMANCE

05 Where the category is overbuilt, and where it's under-delivering.

We asked decision-makers two questions about the same seven capabilities. First: which are in your top three reasons to stay with or choose a provider (importance). Second: how well does your current provider actually perform on each, on a 1 to 10 scale (performance). The gap between the two reveals where the category is spending attention buyers don't value, and where it's under-delivering on the things they do.

IMPORTANCE VS. DELIVERY, BY CAPABILITY n=153

CAPABILITY	BUYERS WHO RANK IT TOP-3	PROVIDERS RATED 9 OR 10 OF 10	DELIVERY GAP
Platform & technology usability	61%	46%	**−15**
Customer relationship quality	54%	49%	**−5**
Compliance guidance	44%	50%	**+6**
Ease of use for HR team	43%	49%	**+6**
ATS / HRIS integration	29%	38%	**+9**
Reporting & analytics	25%	43%	**+18**
Contract flexibility	14%	42%	**+28**

Red: under-delivering on what buyers prioritize **Green**: over-delivering on lower-priority capabilities

UNDER-DELIVERED

Platform usability is the category's widest gap.

61% rank platform usability a top-3 decision driver; only 46% rate their provider 9 or 10 out of 10 on it. The widest gap, on the most important capability.

OVERSUPPLIED

Contract flexibility, reporting, and integrations all over-deliver.

The category performs well on features buyers don't rank highly: 28 points of delivery on contract flexibility against 14 points of buyer priority.

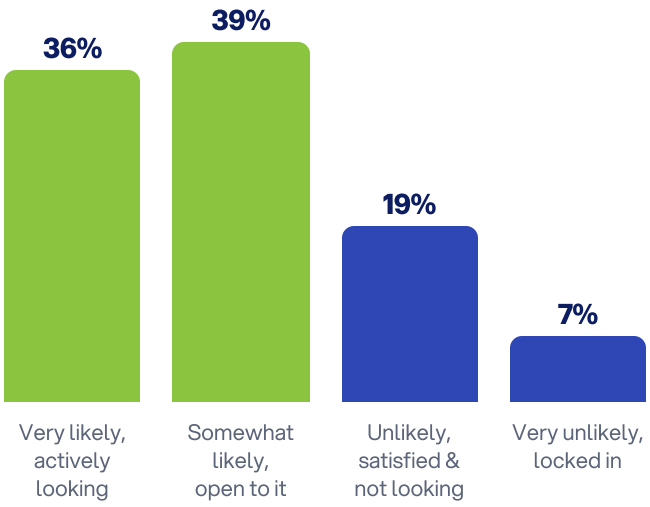
WHAT HR LEADERS ARE CONSIDERING NEXT

06 The year ahead: what buyers are weighing, and what keeps them in place.

Two questions test the edge of the category's movement: how open buyers are to evaluating a new provider in the next 12 months, and what they name as the biggest barriers if they actually tried to switch. The two distributions tell a consistent story: openness is broad; barriers are structural.

LIKELY TO EVALUATE A NEW PROVIDER (NEXT 12 MONTHS) n=153

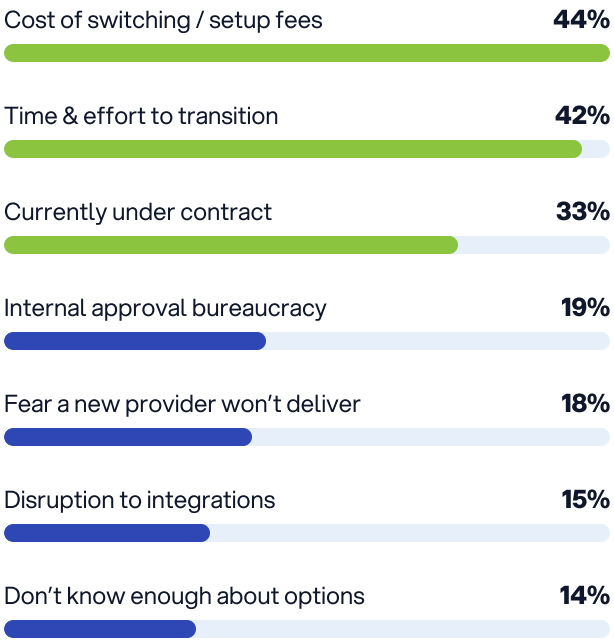
75% are at least somewhat likely to evaluate.



36% of the sample are actively looking for a replacement right now. Among those who've been let down by a sales promise, **89%** are likely to evaluate in the next 12 months.

BIGGEST BARRIERS TO SWITCHING (TOP 2) n=153

Cost and effort top the list.



> **Only 5% of decision-makers say nothing is stopping them from switching. Even the 36% who describe themselves as actively looking cite cost, contract, or effort as gatekeepers. Openness, it turns out, is not the same as freedom, and that gap is where churn gets postponed, not avoided.**

CLOSING: SIX FINDINGS, SUMMARIZED

What the data says, and what it leaves open.

01 Unhappy, and Staying Anyway

81% with their provider 3+ years; only 41% describe themselves as loyal. 68% of those "loyal" buyers are still open to evaluating. Long tenure is friction, not enthusiasm.

02 Table Stakes vs. Decision Drivers

Accuracy and turnaround top minimum expectations. Platform usability, customer relationship, and compliance guidance top decision drivers. Price ranks seventh of eight.

03 Sales Promise vs. Delivery

58% report at least one prior experience where sales-stage promises did not match post-sale delivery. 31% affirm the opposite.

04 Turnaround Experience

50% rate turnaround as consistently fast; 20% describe it as a recurring frustration or a direct drag on hiring.

05 Importance vs. Performance

Platform usability is the widest under-delivery gap (−15). Contract flexibility, reporting, and integrations over-deliver relative to how much buyers prioritize them.

06 What Buyers Are Weighing

75% are at least somewhat likely to evaluate a new provider in the next 12 months. Only 5% say nothing is stopping them. Openness is broad; barriers (cost, effort, contract status) are structural.

TWO QUESTIONS TO CARRY BACK TO YOUR OWN PROGRAM

1. When was the last time you evaluated your screening vendor against criteria that weren't already in your current contract?
2. If you were starting fresh today, would ease of use, platform, and relationship rank where they rank for our respondents, or somewhere else?

Methodology

Online survey of **153 U.S. HR and hiring leaders** involved in background-screening decisions. 208 respondents started the survey; 153 completed Q2 onward and are the reported sample. 136 of those (89%) confirmed personal involvement in or direct influence over a background-screening vendor decision in the last 12 months; the remaining 17 continued through the instrument and are retained in the reported figures. Respondents span healthcare, financial services, technology, manufacturing, business services, and other industries; industry cells smaller than n=10 are not reported separately. Q7 loyalty distribution: loyal 41%, satisfied-but-open 41%, indifferent 16%, stuck or replacing 3%. Mean Q8 satisfaction 77/100. Switching-barrier counts (Q13) are top-2 selections.



Talk to Bchex about switching, without the transition cost.

Start the Conversation

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