2016-17

JobBoardDoctor – JobG8

Global Recruiting Site

Trends Survey

Survey Methodology:

Since its inception (as the Job Board Trends survey) in 2010, this survey been conducted to provide data on the job board and online recruiting industry. This year we had a total of 266 respondents from almost every region of the world, including Europe, Asia, North America, and Africa. We were particularly pleased to see an 21% increase in response rate from the previous year. Special thanks to our sponsor for this survey, JobG8.

The survey was open and promoted to all job boards and recruiting-related sites and services worldwide. The questionnaire was developed Jeff Dickey-Chasins and took less than 14 minutes to complete. Respondents could participate anonymously or by name.

The survey included 34 questions covering:
- Demographics
- Site performance
- Organizational business model
- 2016-17 business plans
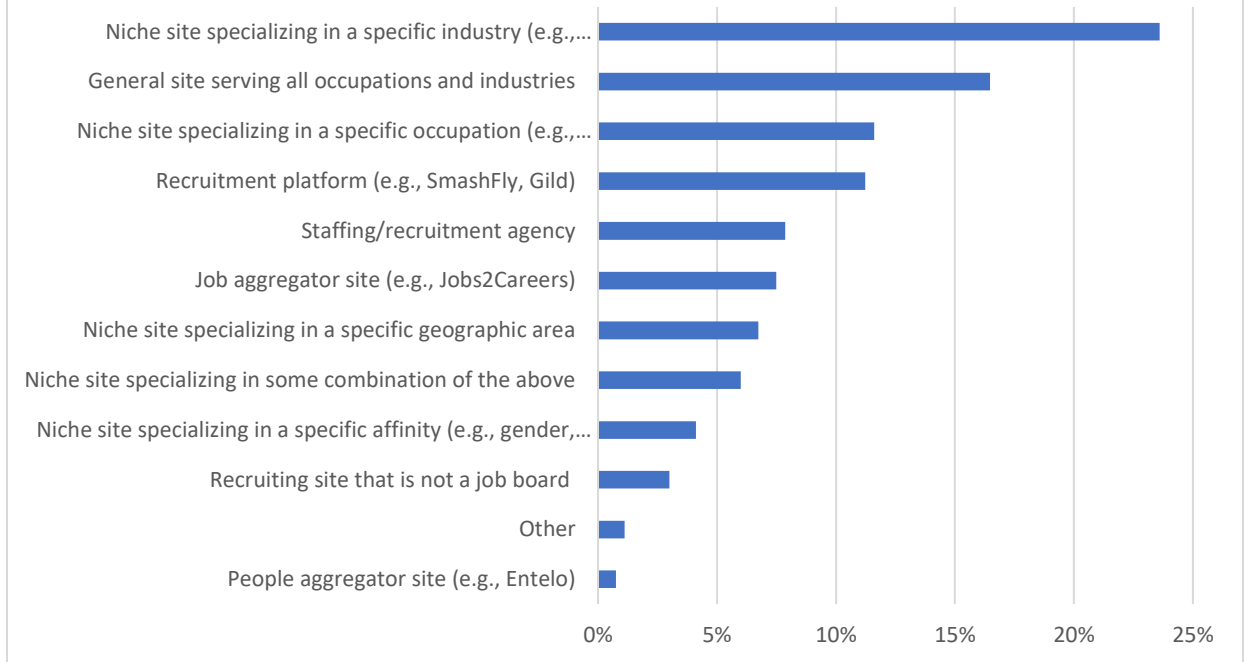- Perceived threats and opportunities

Survey responses were collected October-December 2016.
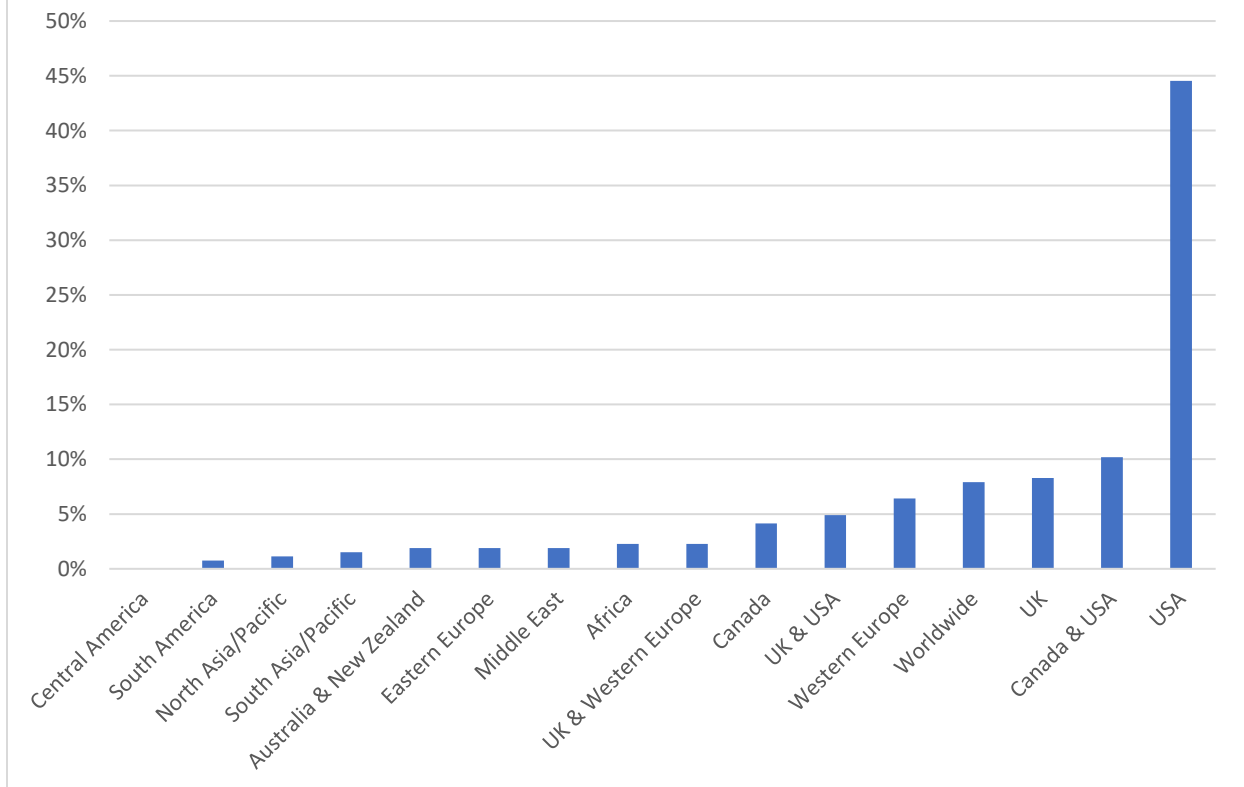
Executive Summary

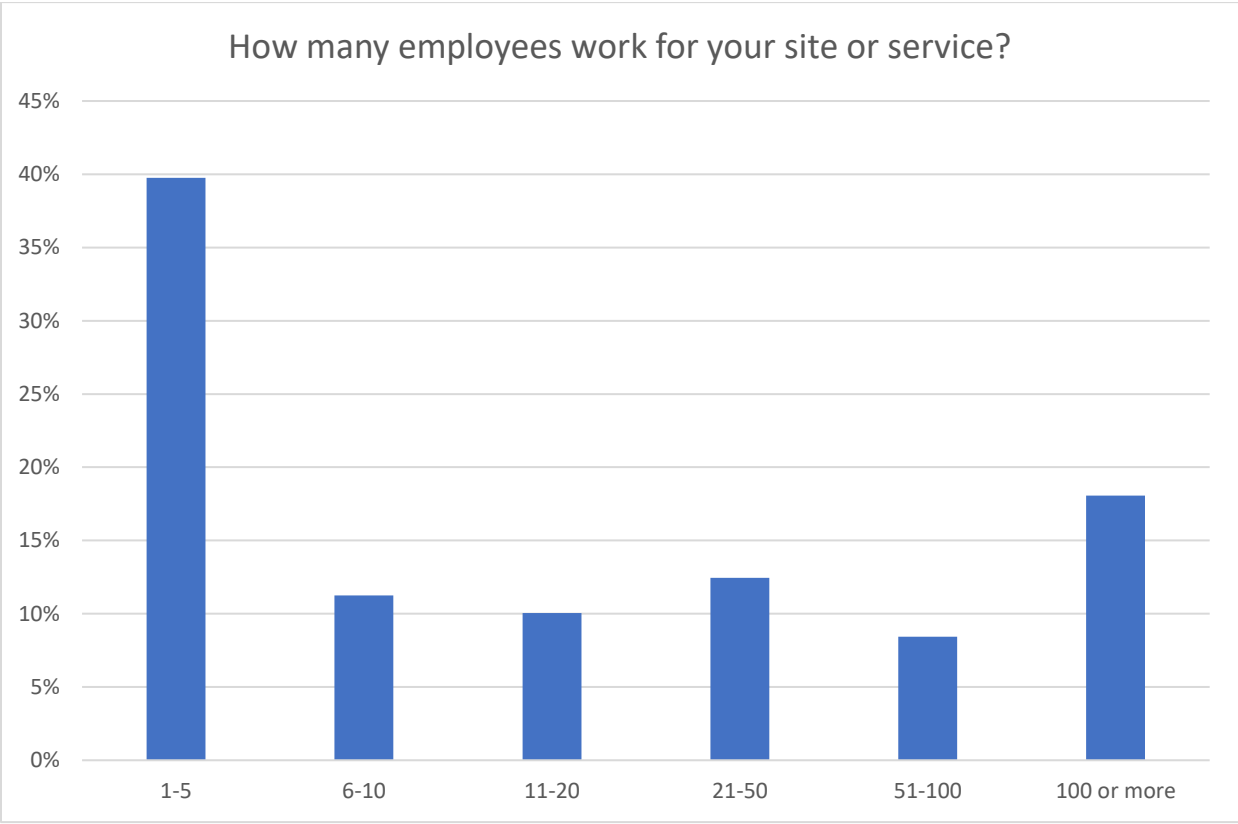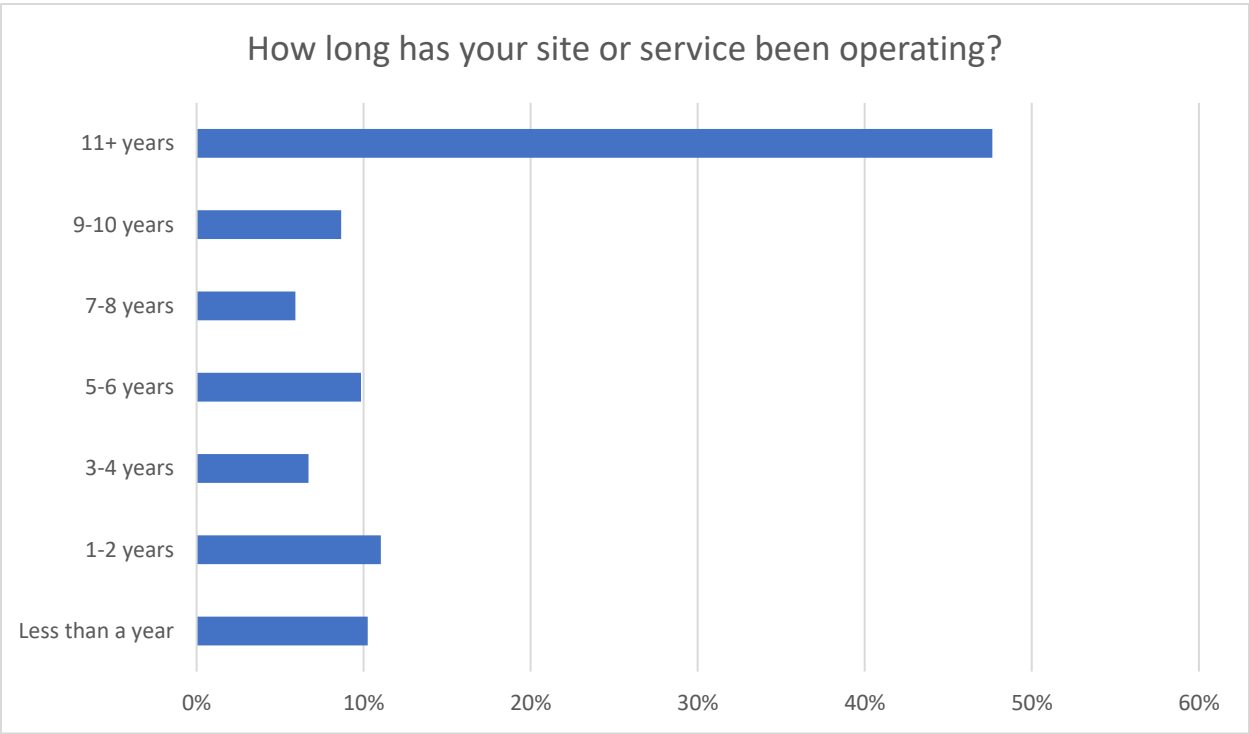Here are some of the key findings from the survey:

- 51% of respondents described themselves as some type of **niche job board**; 11% were **recruitment platforms**; and 16% were **general recruitment sites**

- 40% reported monthly unique visitors **in excess of 200,000**

- 38% of respondents are planning to **increase rates** in the next 12 months

- Almost half of the respondents reported that their job postings received **16+ application clicks** on average

- **Job alerts** provide the highest quality of job application traffic for employers

- 74% reported that the primary criteria for client renewal was the **quality of applicants**

- 44% of respondents reported that their sites are getting at **least 40% or more of their traffic from mobile**

- **Top threats**: Indeed and other job aggregators (44%); economic slowdown (37%); and new competitors and/or old competitors with new capabilities (36%)

- 31% of respondents are planning to **exhibit at a trade show** in the next 12 months

- 81% of respondents have a **dedicated internal sales staff**

- 84% of respondents are **optimistic about their opportunities** in the next 12 months

Which of the following *best* describes your organization?

Categories (top to bottom):
- Niche site specializing in a specific industry (e.g.,…) — ~23.5%
- General site serving all occupations and industries — ~16.5%
- Niche site specializing in a specific occupation (e.g.,…) — ~11.5%
- Recruitment platform (e.g., SmashFly, Gild) — ~11%
- Staffing/recruitment agency — ~7.5%
- Job aggregator site (e.g., Jobs2Careers) — ~7%
- Niche site specializing in a specific geographic area — ~6.5%
- Niche site specializing in some combination of the above — ~6%
- Niche site specializing in a specific affinity (e.g., gender,…) — ~4%
- Recruiting site that is not a job board — ~3%
- Other — ~1%
- People aggregator site (e.g., Entelo) — ~0.7%

Where is your organization's business primarily conducted?

Categories (left to right): Central America, South America, North Asia/Pacific, South Asia/Pacific, Australia & New Zealand, Eastern Europe, Middle East, Africa, UK & Western Europe, Canada, UK & USA, Western Europe, Worldwide, UK, Canada & USA, USA (~44.5%)

How long has your site or service been operating?

Category	Percentage
11+ years	~47%
9-10 years	~8%
7-8 years	~6%
5-6 years	~10%
3-4 years	~6%
1-2 years	~11%
Less than a year	~10%

How many employees work for your site or service?

Category	Percentage
1-5	~40%
6-10	~11%
11-20	~10%
21-50	~12%
51-100	~8%
100 or more	~18%

On average, how many unique visitors does your site or service attract per month (web & mobile)?

Category	Value
Don't know	~10%
2,000,001 or more	~15.5%
1,000,001-2,000,000	~6.7%
500,001 - 1,000,000	~7.8%
200,000 - 500,000	~10%
100,001 - 200,000	~8.3%
50,001 - 100,000	~6.7%
25,001 - 50,000	~10.5%
10,001 - 25,000	~10%
0 – 10,000	~14.5%
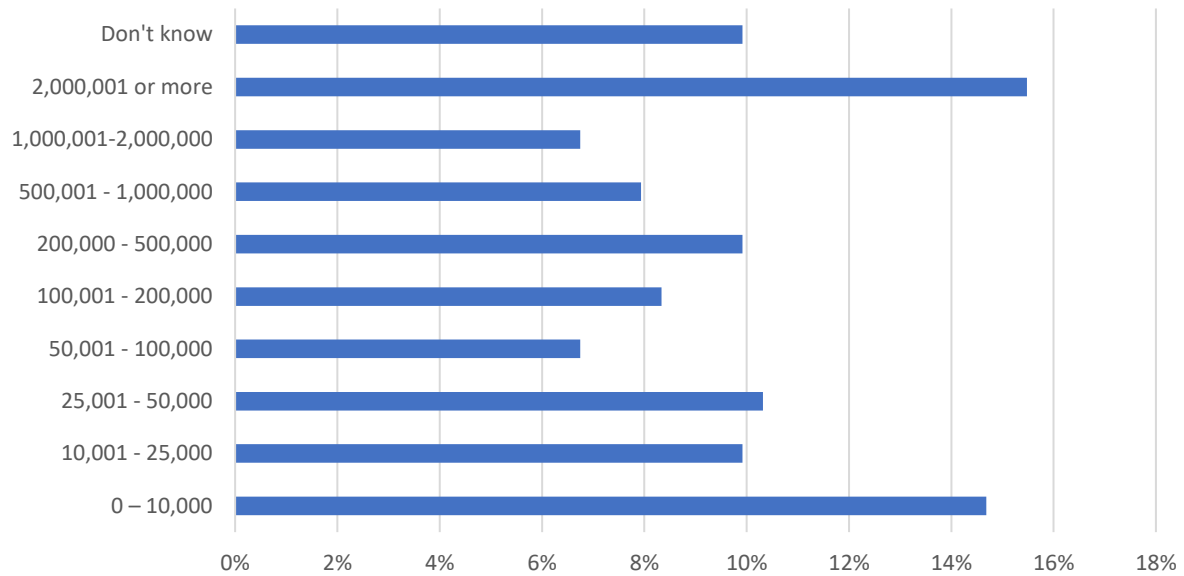
On average, how many new *paid* jobs are posted on your site or service each month?

Category	Value
Not Applicable	~13.5%
Don't know	~4%
More than 10,000	~24%
5000 - 10,000	~5.5%
3001 - 5000	~4%
1500 - 3000	~3.8%
1001 - 1500	~3.8%
501 - 1000	~5.5%
251 - 500	~6.3%
101 - 250	~11.8%
1 - 50	~19.5%
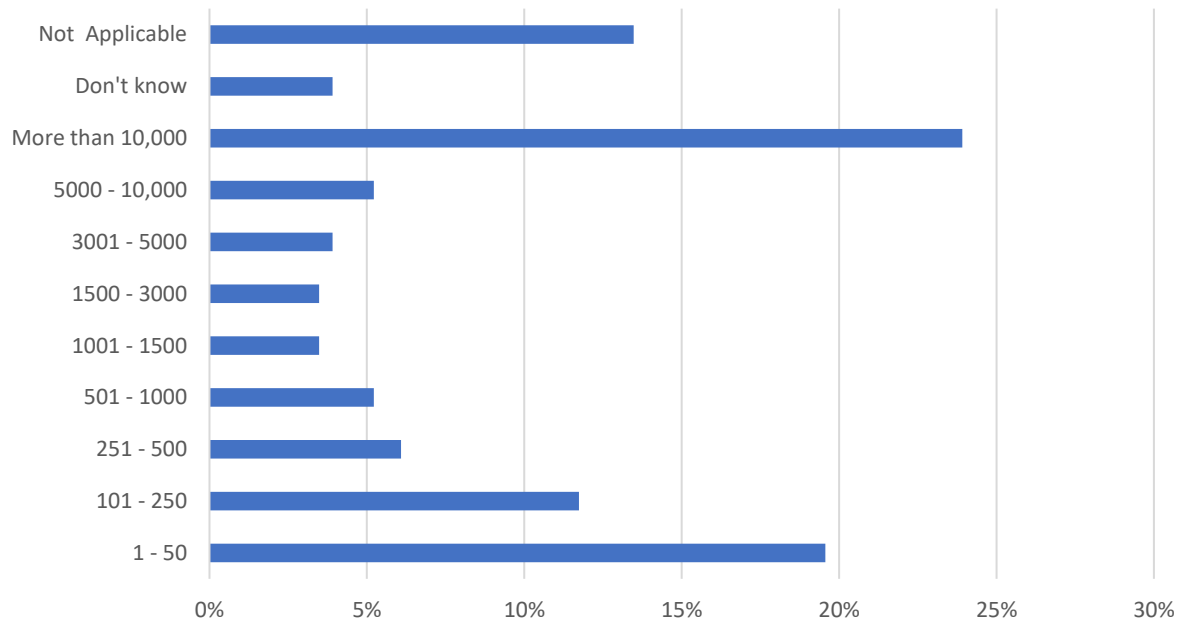
Regarding your *paid* jobs, what kind of job posting does the *majority* represent?

Category	Percentage
Single postings	~30%
Subscription/unlimited packages	~22%
Job posting packages (3-pack, 5-pack, etc.)	~19%
Not applicable	~14%
Cost per click	~9%
Cost per application	~2%
Slots/seats	~2%
Cost per hire	~1%
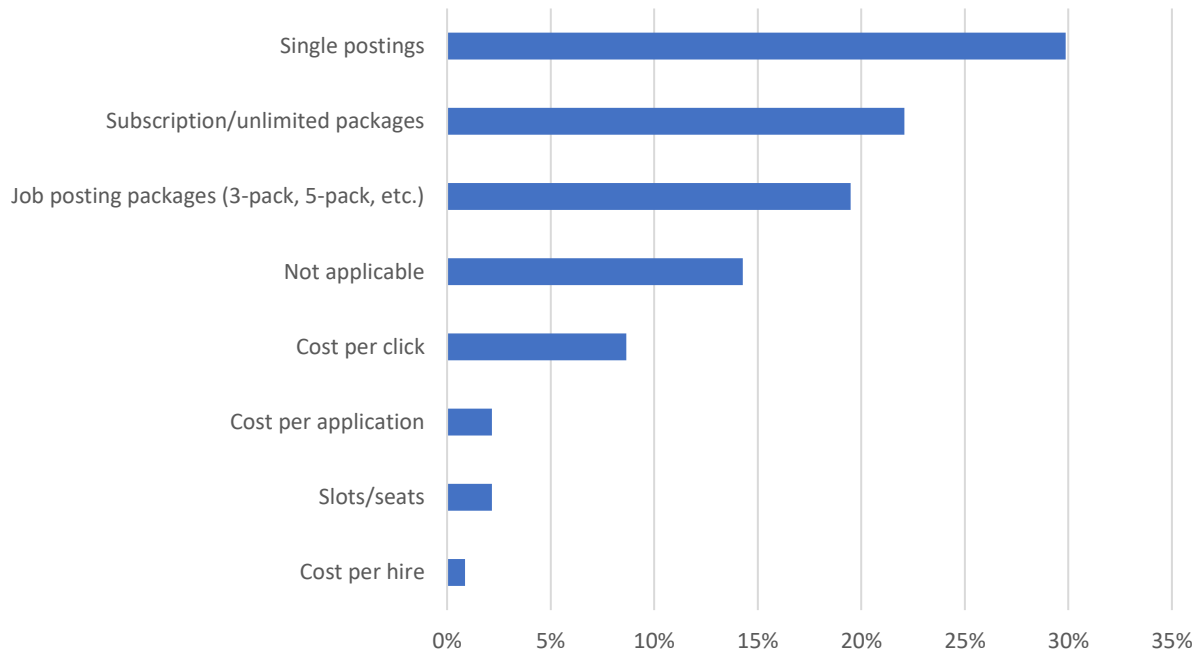
Do you track the number of application clicks for each posting on your site or service?

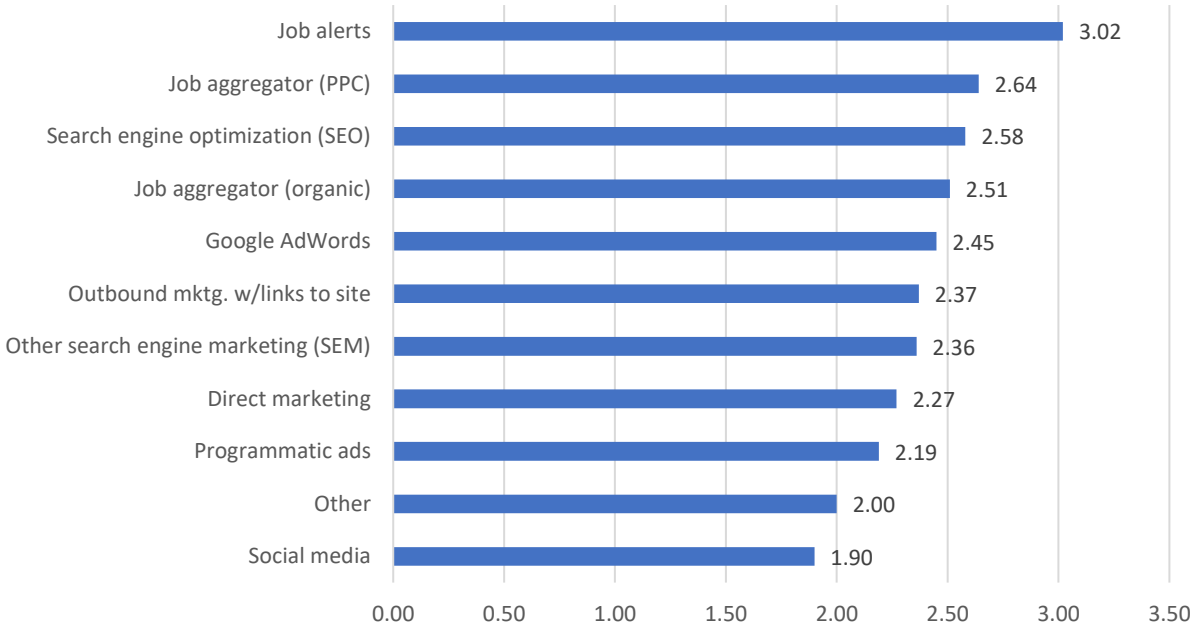| Response	Percentage
Yes	~69%
No	~20%
Not applicable	~11%
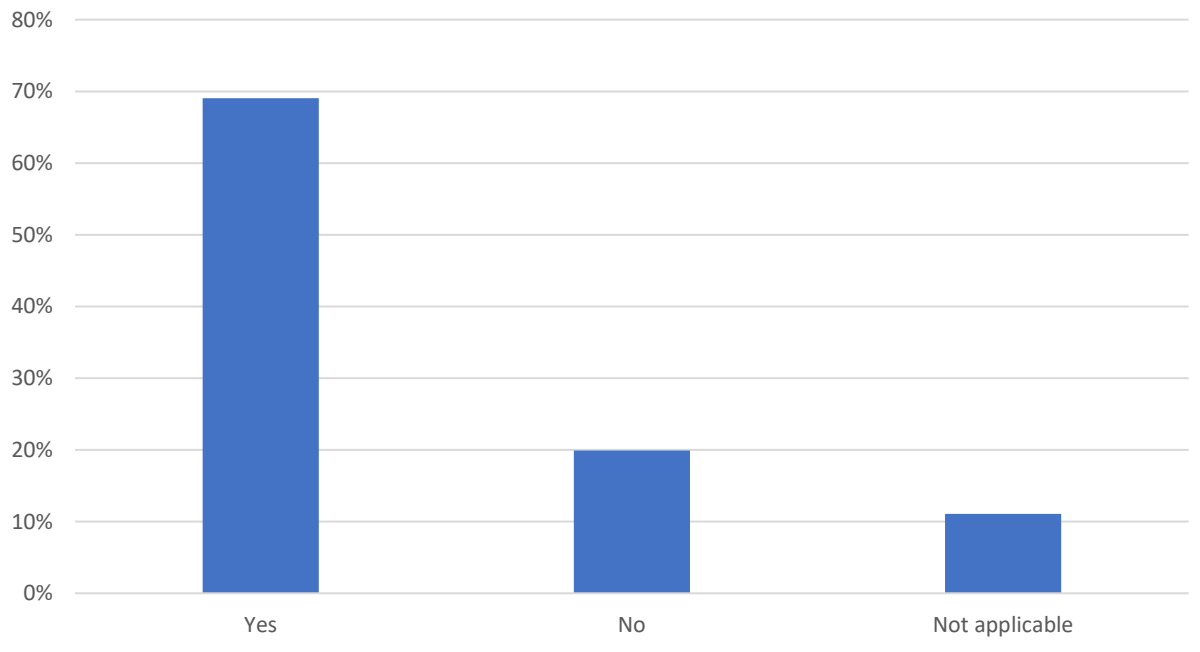
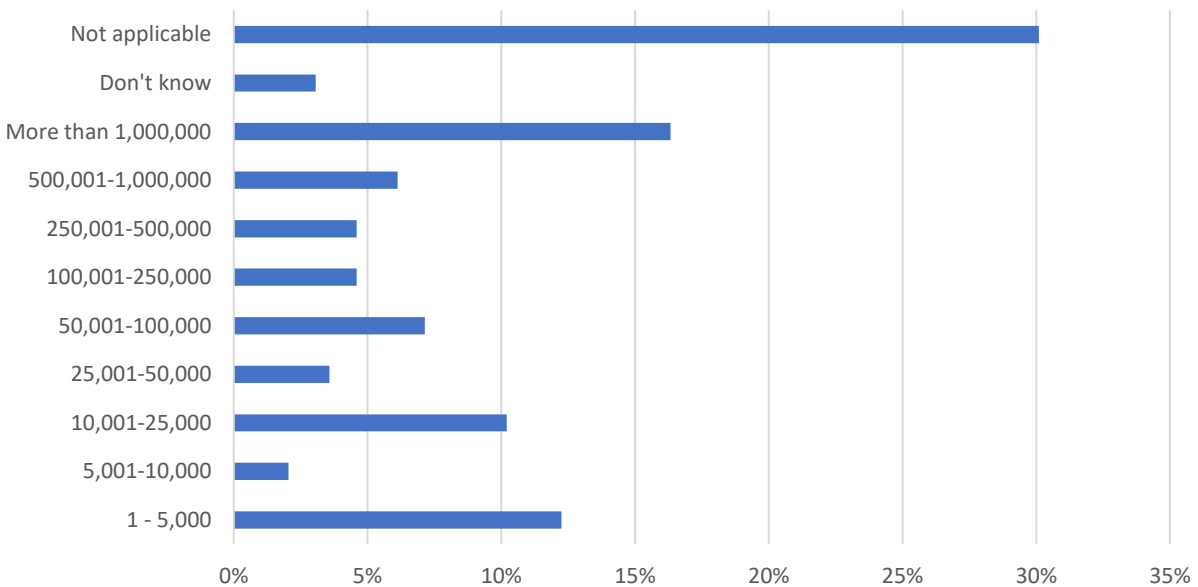## On average, how many application clicks were made for each posting in 2016?
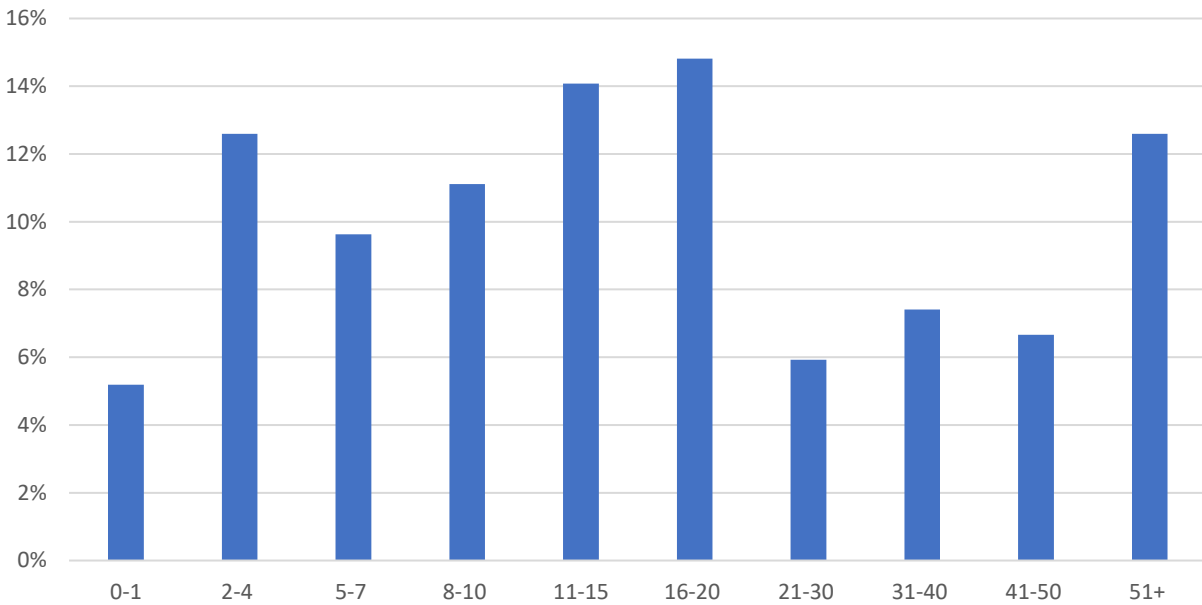
Do you track the conversion rate generated by your job postings (i.e., the number of times a job is clicked divided by the number of applications the posting generates)?
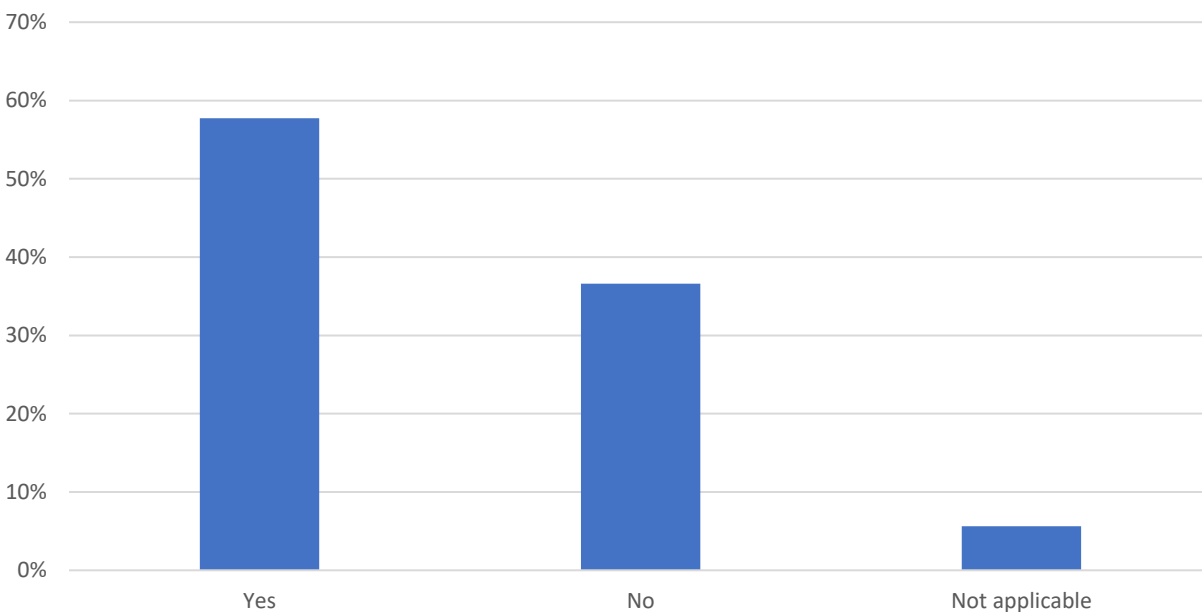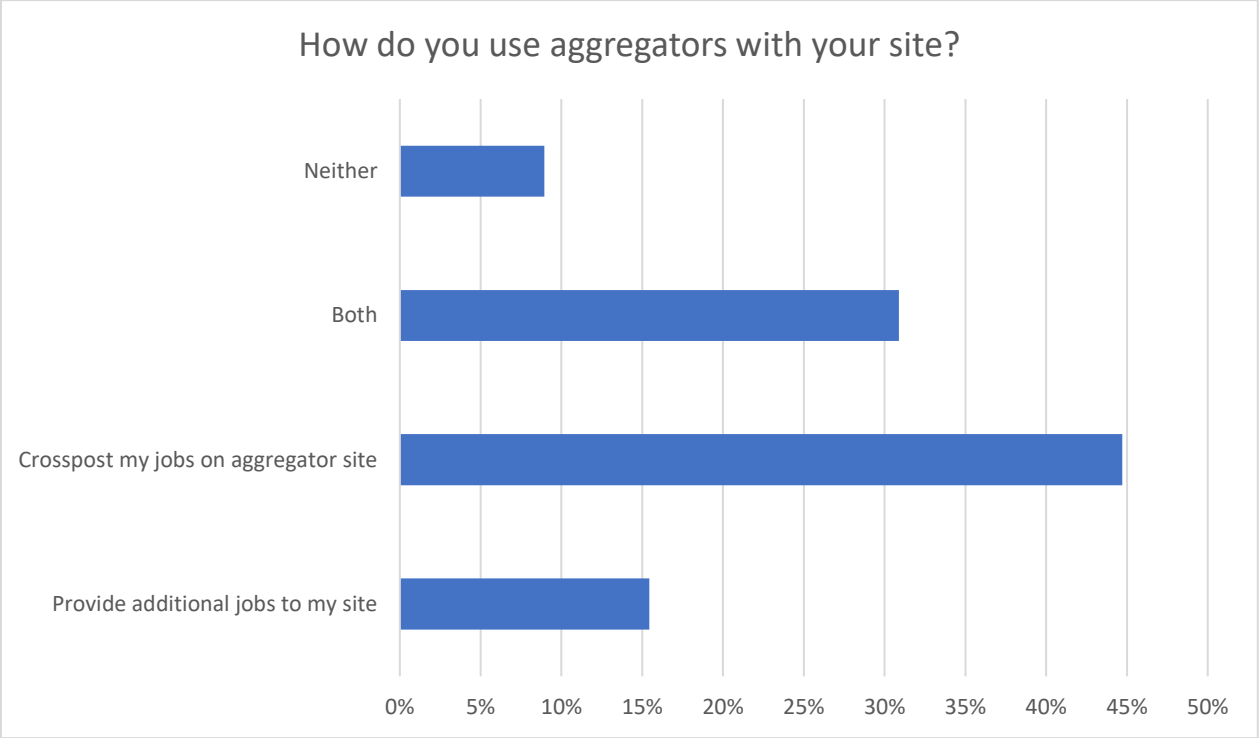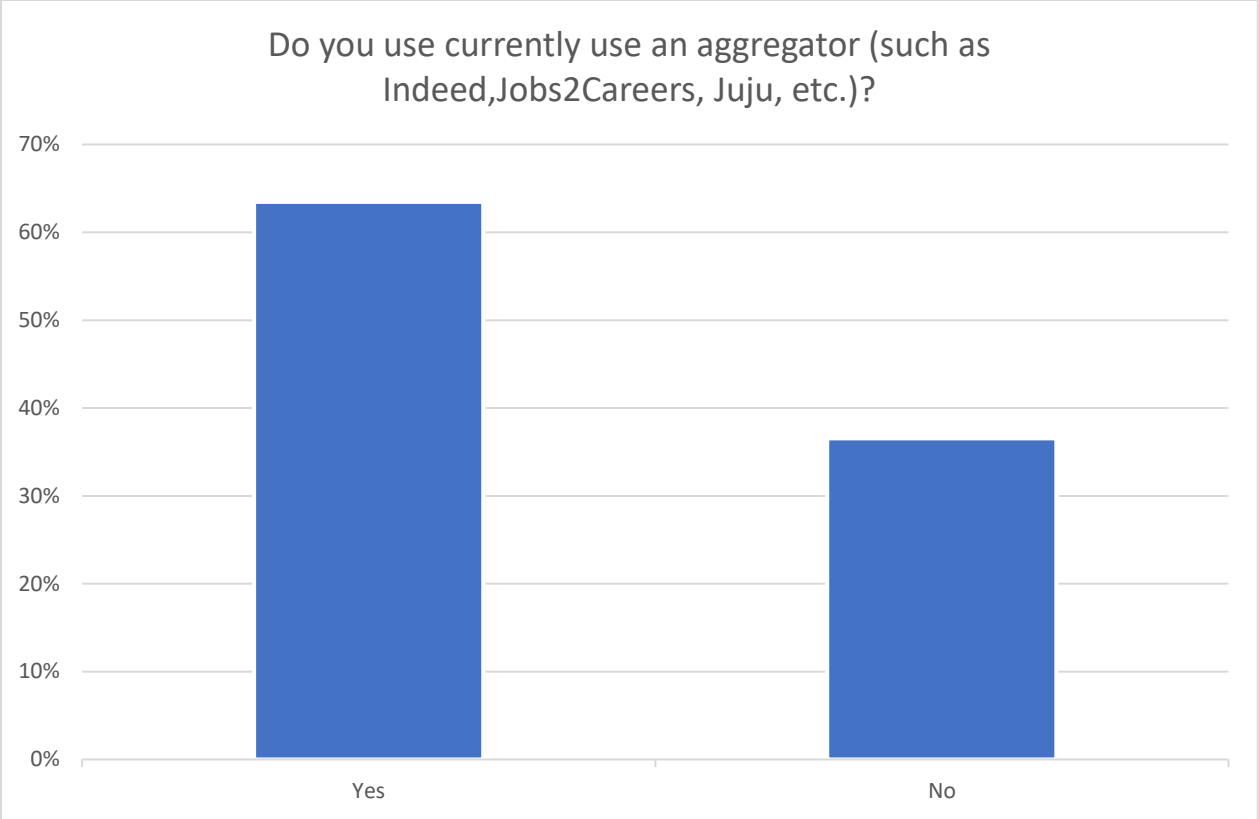
How would you rate the following sources of traffic to your site, based on the conversion of traffic into applications for your client?

Source	Rating
Job alerts	3.02
Job aggregator (PPC)	2.64
Search engine optimization (SEO)	2.58
Job aggregator (organic)	2.51
Google AdWords	2.45
Outbound mktg. w/links to site	2.37
Other search engine marketing (SEM)	2.36
Direct marketing	2.27
Programmatic ads	2.19
Other	2.00
Social media	1.90

If your site offers a resume or profile database that is accessible by employers, how many resumes or profiles are currently stored in the database?

Do you use currently use an aggregator (such as Indeed,Jobs2Careers, Juju, etc.)?

Bar chart showing:
- Yes: approximately 63%
- No: approximately 36%

(Y-axis ranges from 0% to 70%)

How do you use aggregators with your site?

Horizontal bar chart showing:
- Neither: approximately 9%
- Both: approximately 31%
- Crosspost my jobs on aggregator site: approximately 45%
- Provide additional jobs to my site: approximately 15%

(X-axis ranges from 0% to 50%)

Which of the following aggregator services do you use to increase your traffic? (check all that apply)

Do you plan to change the job aggregator(s) you currently use in the next 12 months?

In general, which of the following criteria are most important to your clients with regard to using or renewing your recruiting services? (Select the top 3)
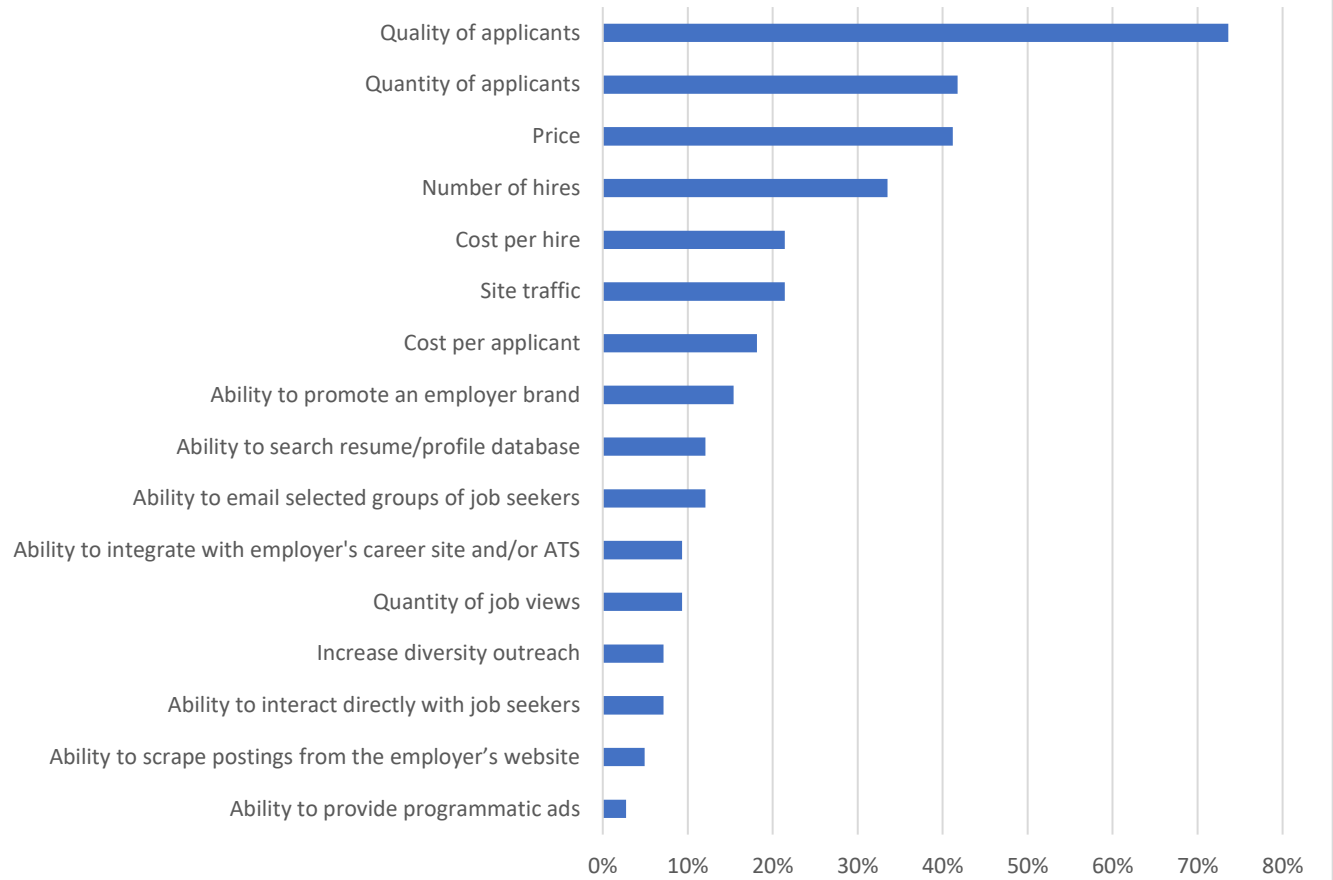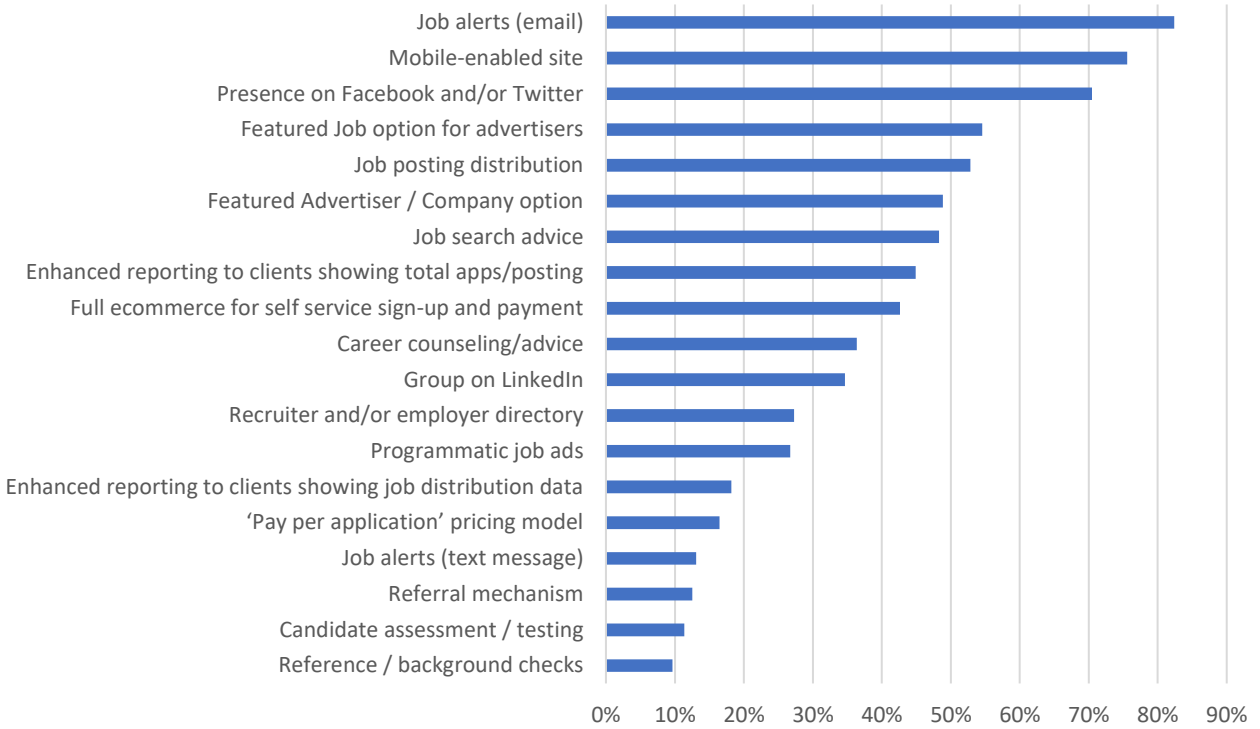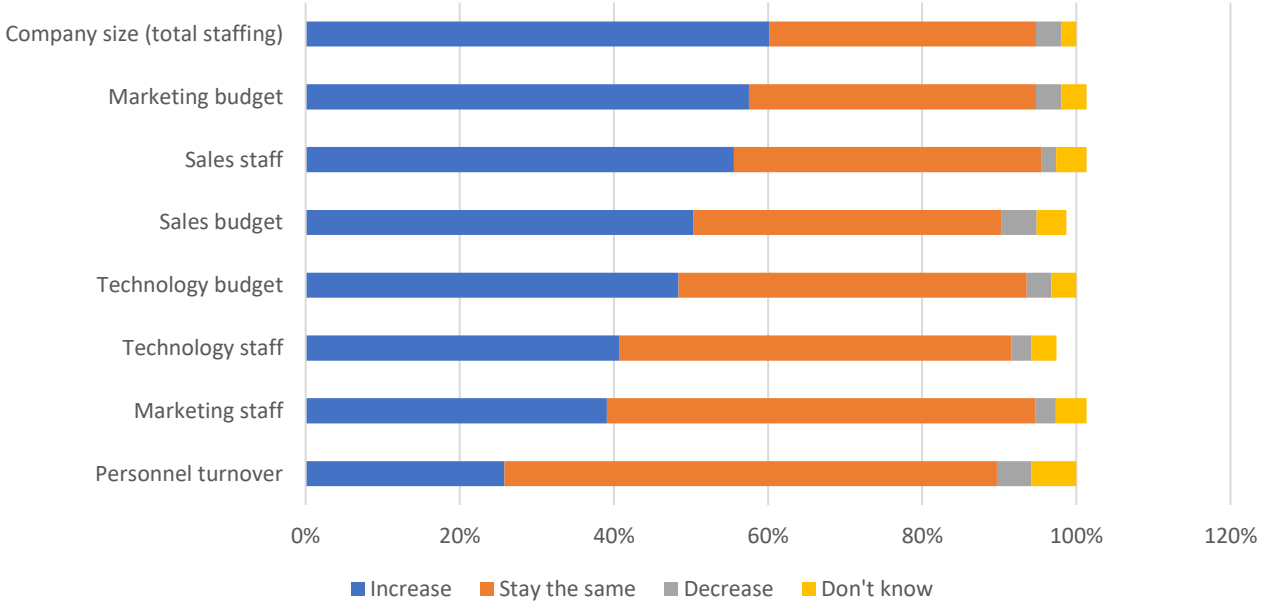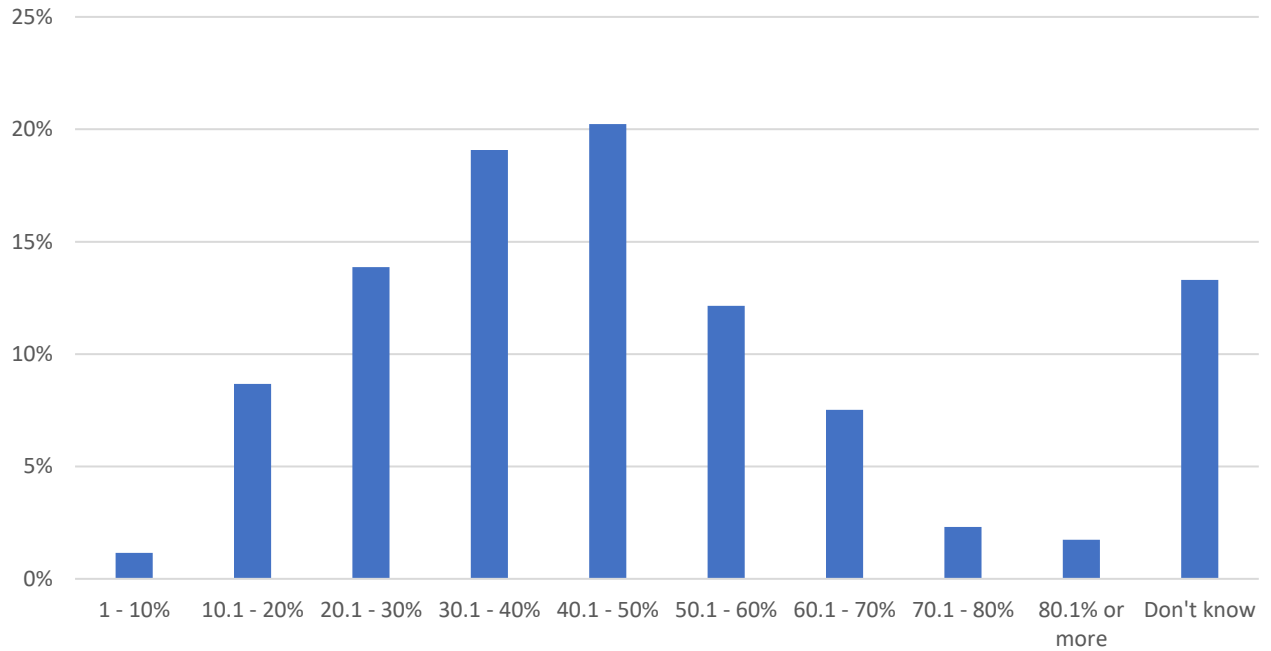
Which of the following of the services do you currently offer to your clients and candidates? (Check all that apply)
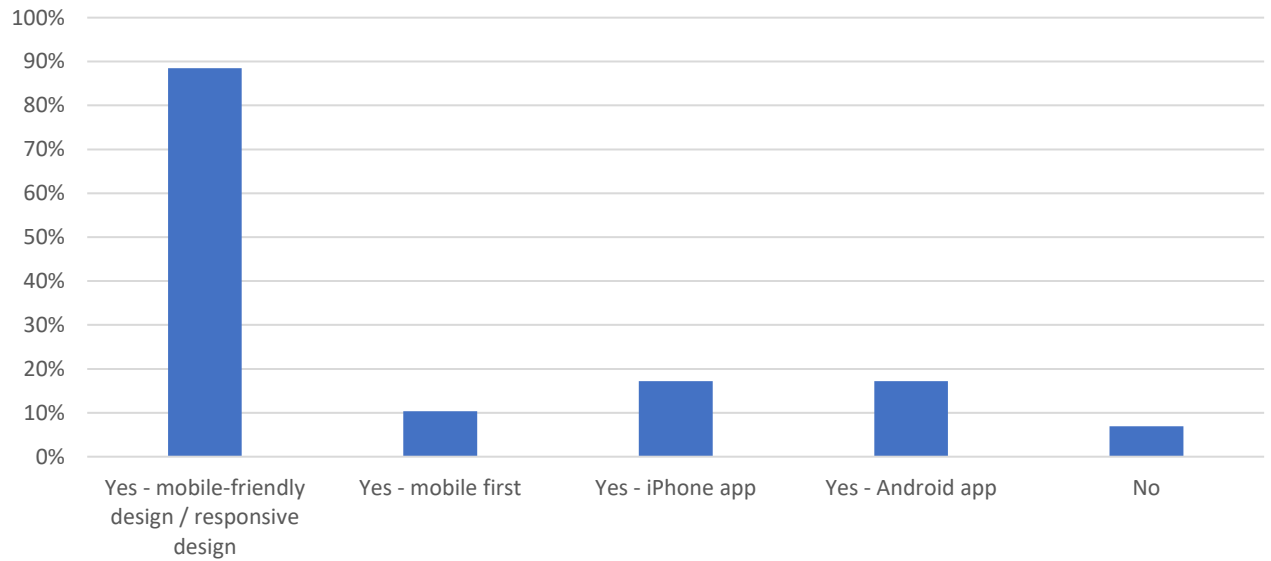
Service	Percentage
Job alerts (email)	~82%
Mobile-enabled site	~74%
Presence on Facebook and/or Twitter	~70%
Featured Job option for advertisers	~54%
Job posting distribution	~53%
Featured Advertiser / Company option	~50%
Job search advice	~49%
Enhanced reporting to clients showing total apps/posting	~47%
Full ecommerce for self service sign-up and payment	~44%
Career counseling/advice	~36%
Group on LinkedIn	~35%
Recruiter and/or employer directory	~27%
Programmatic job ads	~27%
Enhanced reporting to clients showing job distribution data	~18%
'Pay per application' pricing model	~16%
Job alerts (text message)	~14%
Referral mechanism	~13%
Candidate assessment / testing	~12%
Reference / background checks	~10%

Over the next 12 months, how do you predict the following elements of your business to change?

Legend: ■ Increase ■ Stay the same ■ Decrease ■ Don't know

- Company size (total staffing)
- Marketing budget
- Sales staff
- Sales budget
- Technology budget
- Technology staff
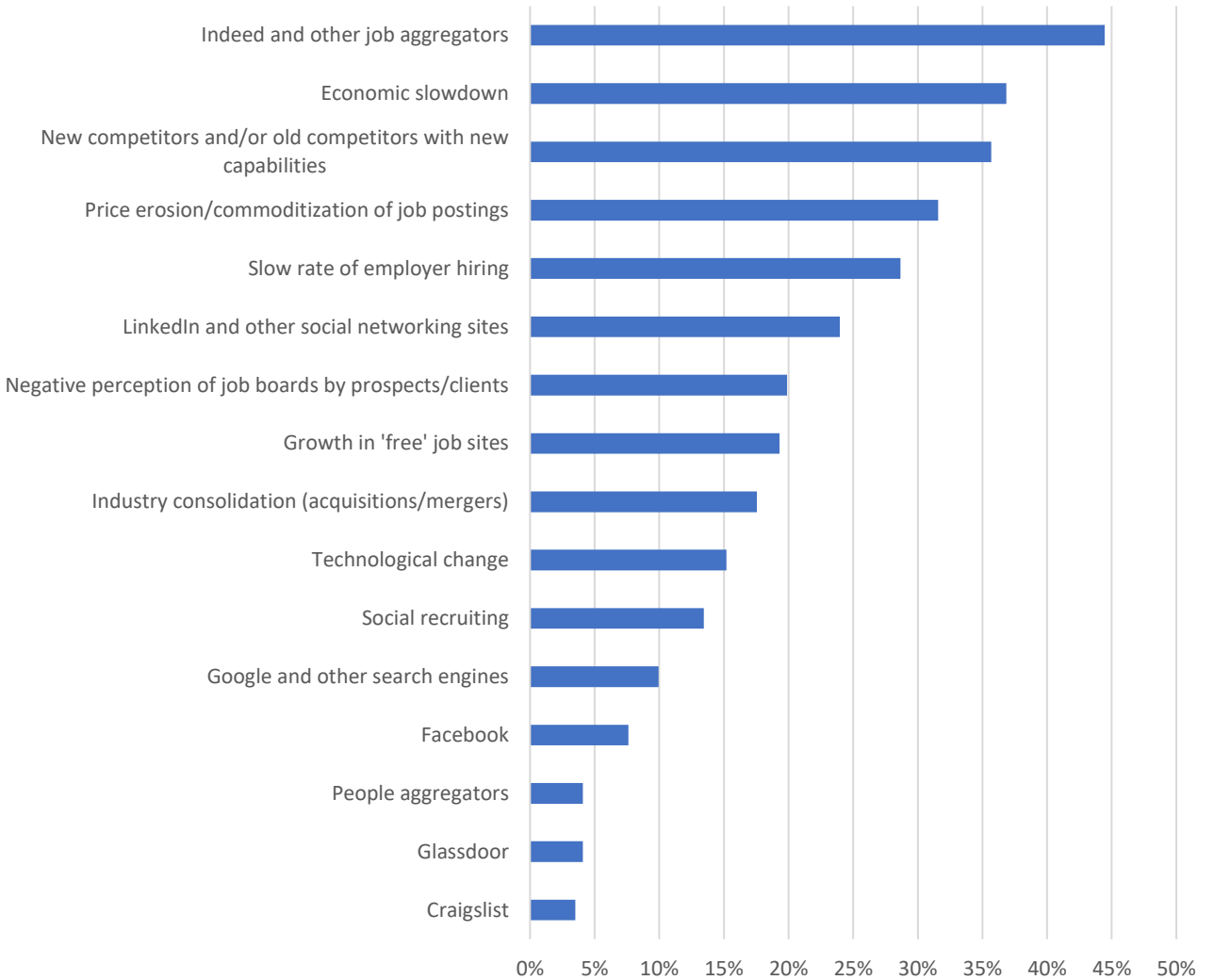- Marketing staff
- Personnel turnover

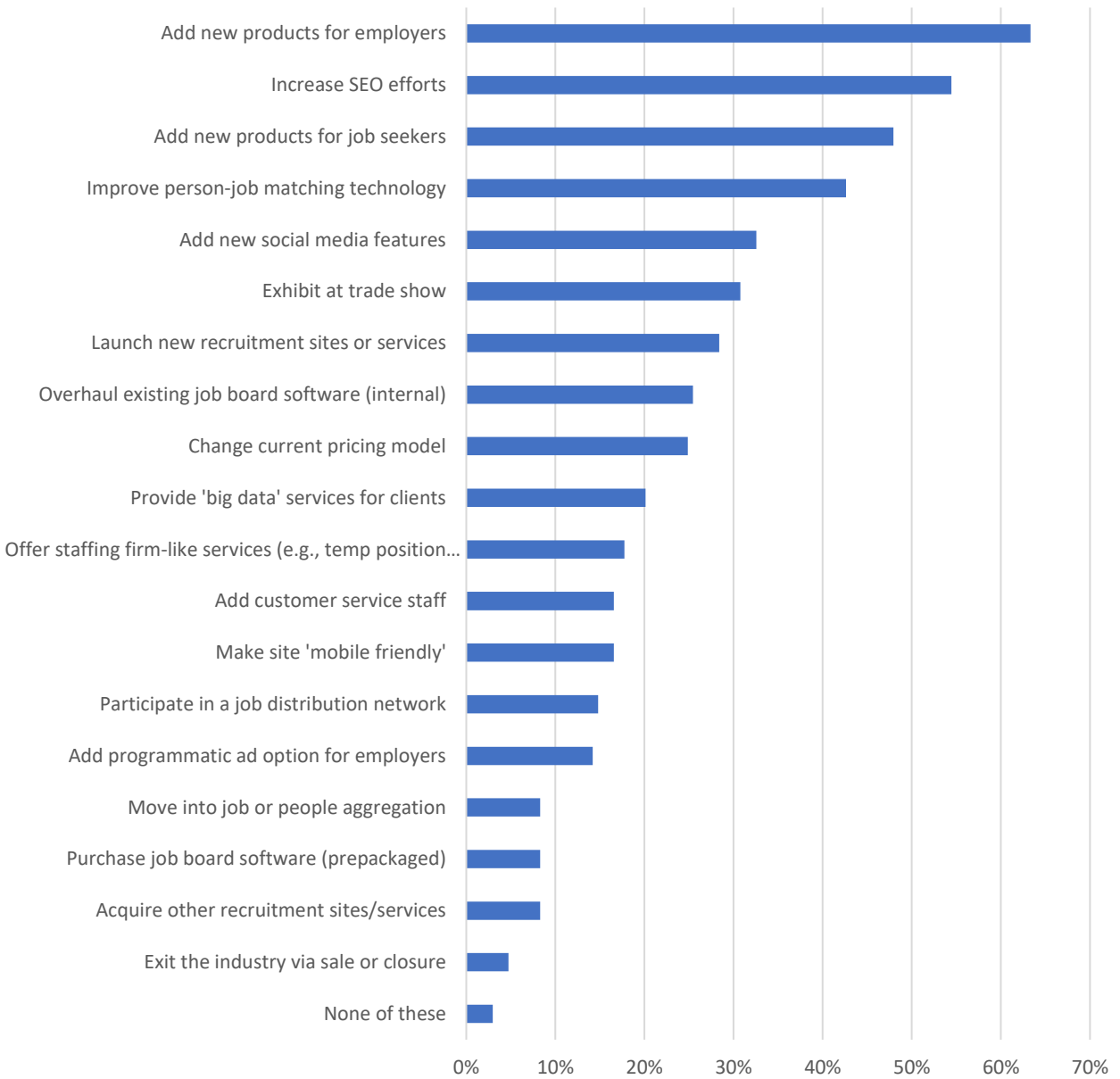## What percent of your site(s) traffic comes from mobile?

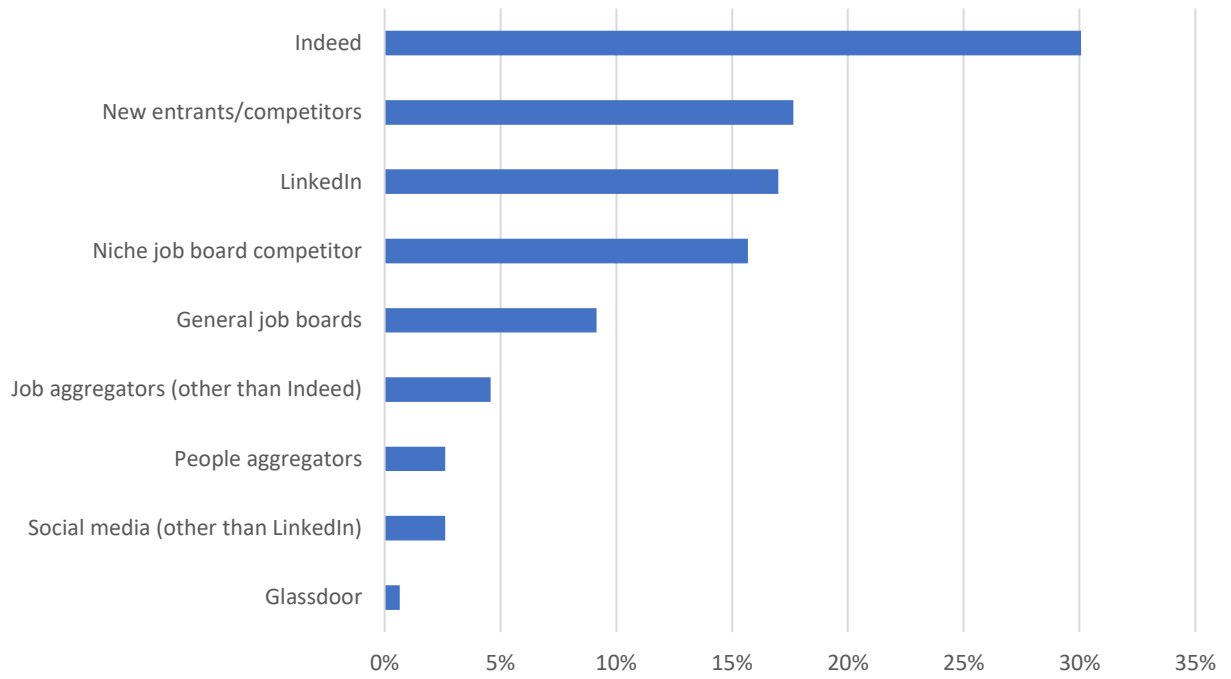## Do you have a mobile-friendly version of your site? (Check all that apply)

Which of the following do you see as the most significant *threats* to your business in the next 12 to 24 months? (Check all that apply)

Threat	Percentage
Indeed and other job aggregators	44%
Economic slowdown	37%
New competitors and/or old competitors with new capabilities	36%
Price erosion/commoditization of job postings	32%
Slow rate of employer hiring	29%
LinkedIn and other social networking sites	24%
Negative perception of job boards by prospects/clients	20%
Growth in 'free' job sites	19%
Industry consolidation (acquisitions/mergers)	17%
Technological change	15%
Social recruiting	13%
Google and other search engines	10%
Facebook	8%
People aggregators	4%
Glassdoor	4%
Craigslist	3%

Which of the following actions are you planning in the next 12 months?

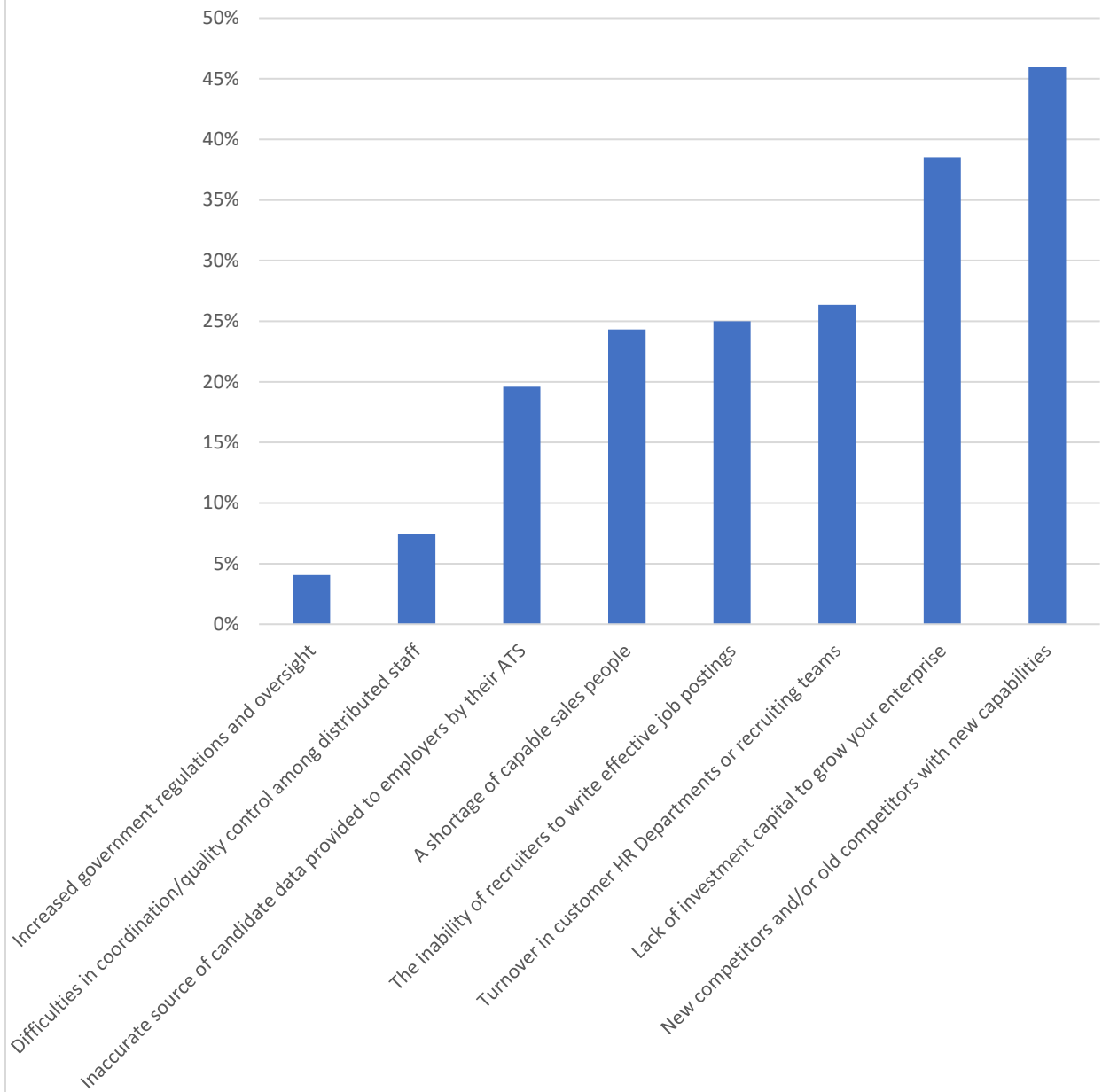| Action	Percentage
Add new products for employers	~63%
Increase SEO efforts	~54%
Add new products for job seekers	~48%
Improve person-job matching technology	~42%
Add new social media features	~32%
Exhibit at trade show	~31%
Launch new recruitment sites or services	~28%
Overhaul existing job board software (internal)	~25%
Change current pricing model	~24%
Provide 'big data' services for clients	~20%
Offer staffing firm-like services (e.g., temp position...	~18%
Add customer service staff	~16%
Make site 'mobile friendly'	~16%
Participate in a job distribution network	~15%
Add programmatic ad option for employers	~14%
Move into job or people aggregation	~9%
Purchase job board software (prepackaged)	~9%
Acquire other recruitment sites/services	~9%
Exit the industry via sale or closure	~5%
None of these	~3%

Which of the following do you see as the *single biggest* competitive threat to your business in the next 12 months?

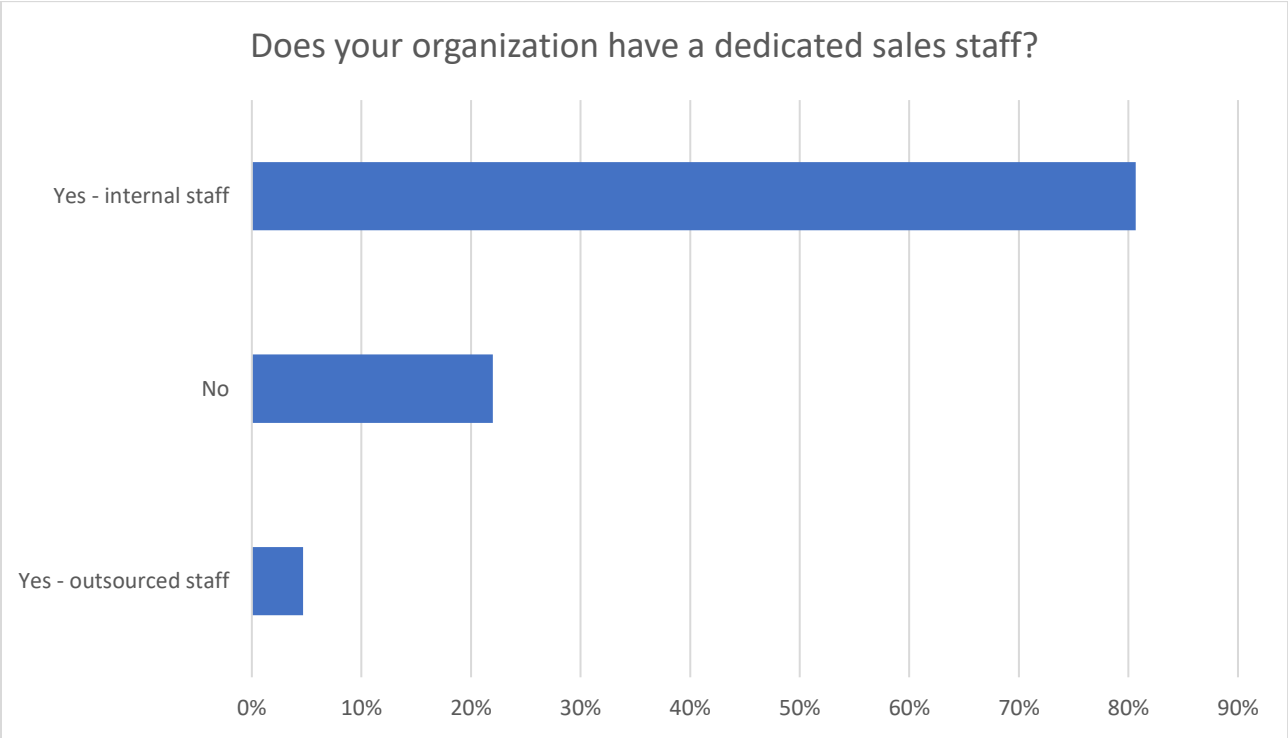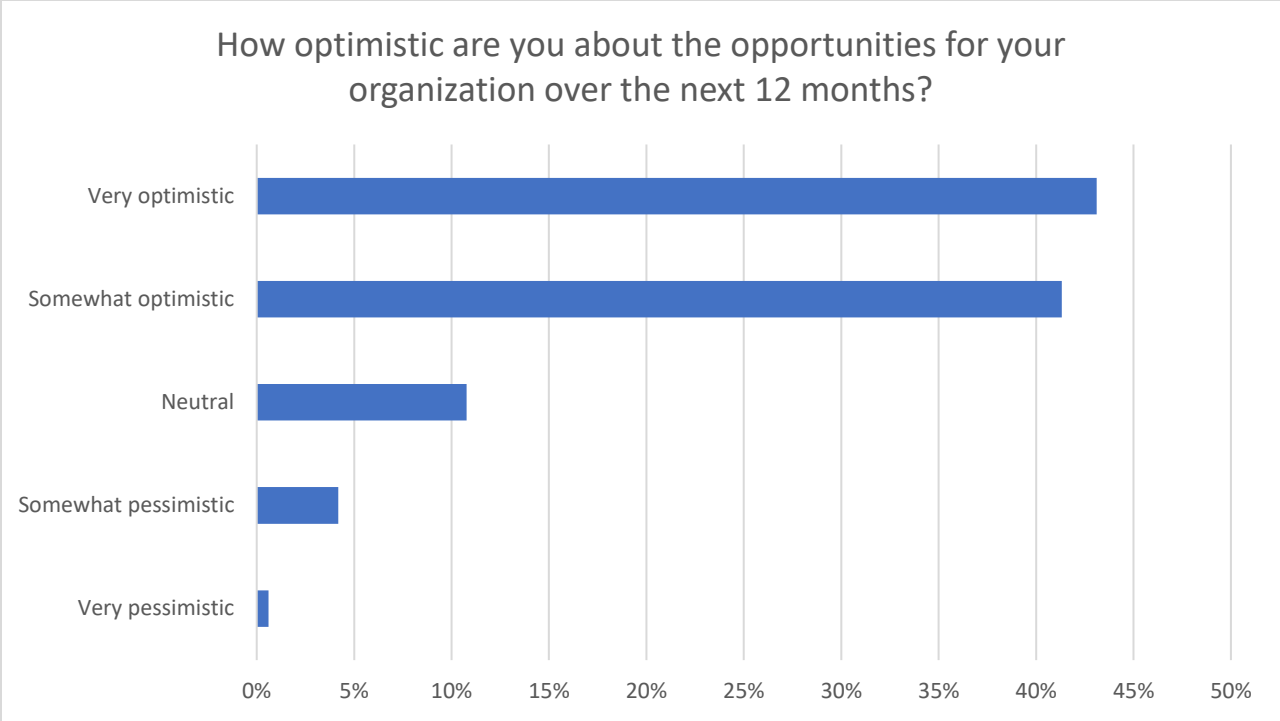| Category	Value
Indeed	~30%
New entrants/competitors	~17.5%
LinkedIn	~17%
Niche job board competitor	~15.5%
General job boards	~9%
Job aggregators (other than Indeed)	~4.5%
People aggregators	~2.5%
Social media (other than LinkedIn)	~2.5%
Glassdoor	~0.5%

0% 5% 10% 15% 20% 25% 30% 35%

What is your best estimate of revenues for your business in the next 12 months? (in USD)

Range	Value
$100,000 or less	~14.7%
$100,001-$250,000	~12.9%
$250,001-$500,000	~8.6%
$500,001-$1,000,000	~12.9%
$1,000,001-$3,000,000	~16.6%
$3,000,001-$5,000,000	~8%
$5,000,001-$7,500,000	~1.2%
$7,500,001-$10,000,000	~4.9%
$10,000,001-$15,000,000	~5.5%
$15,000,001-$20,000,000	~1.9%
$20,000,001-$35,000,000	~4.3%
$35,000,001-$50,000,000	~1.9%
$50,000,001+	~6.8%
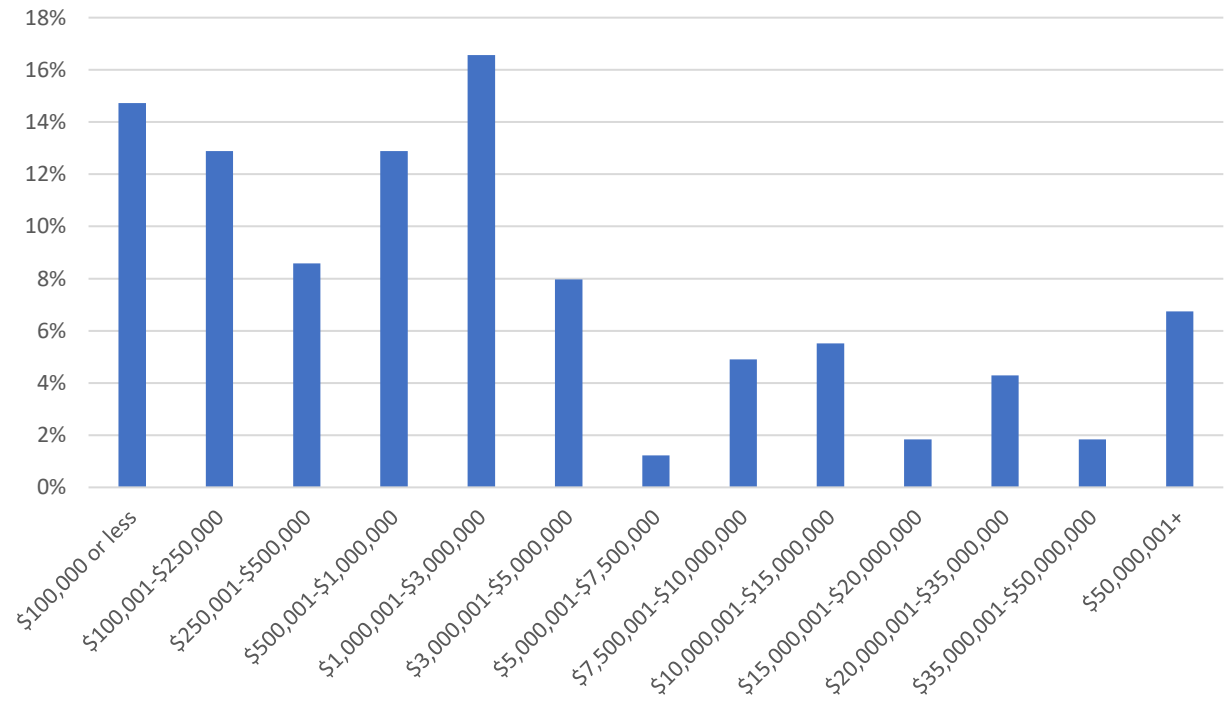
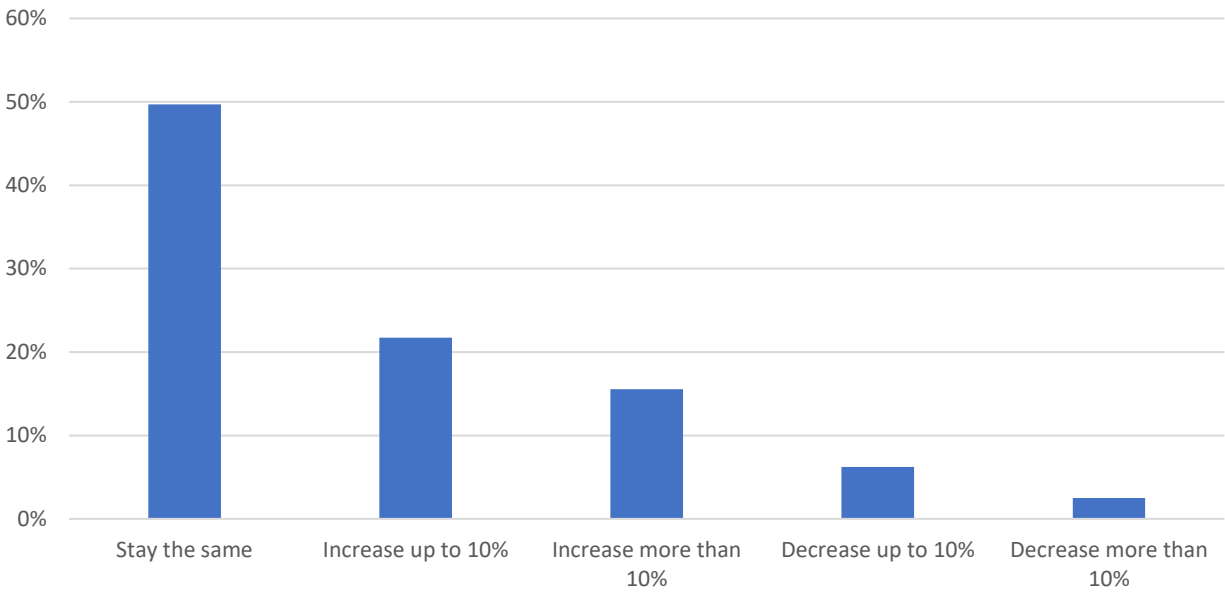## Which (if any) of the following challenges or impediments will *significantly* affect your organization during 2016-17?
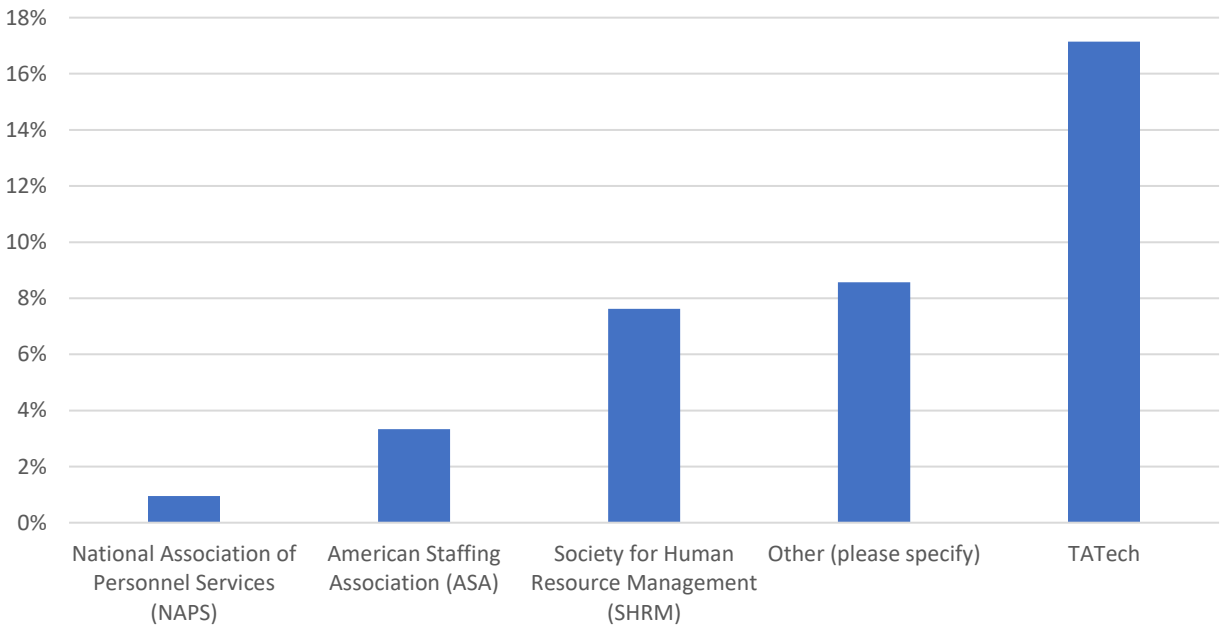
How optimistic are you about the opportunities for your organization over the next 12 months?

Very optimistic	~43%
Somewhat optimistic	~41%
Neutral	~10.5%
Somewhat pessimistic	~4%
Very pessimistic	~1%

Does your organization have a dedicated sales staff?

Yes - internal staff	~81%
No	~22%
Yes - outsourced staff	~5%

For 2017, which of the following best describes your overall rate structure for recruiting products and services?

(Bar chart)
- Stay the same: ~49%
- Increase up to 10%: ~21%
- Increase more than 10%: ~15%
- Decrease up to 10%: ~6%
- Decrease more than 10%: ~2%

Please indicate if your organization is a paid member of the following associations (check all that apply):

(Bar chart)
- National Association of Personnel Services (NAPS): ~1%
- American Staffing Association (ASA): ~3%
- Society for Human Resource Management (SHRM): ~7.5%
- Other (please specify): ~8.5%
- TATech: ~17%

Are you planning to seek, or currently seeking, outside funding for your organization in the coming 12 months? (i.e., angels, venture capital,etc.)
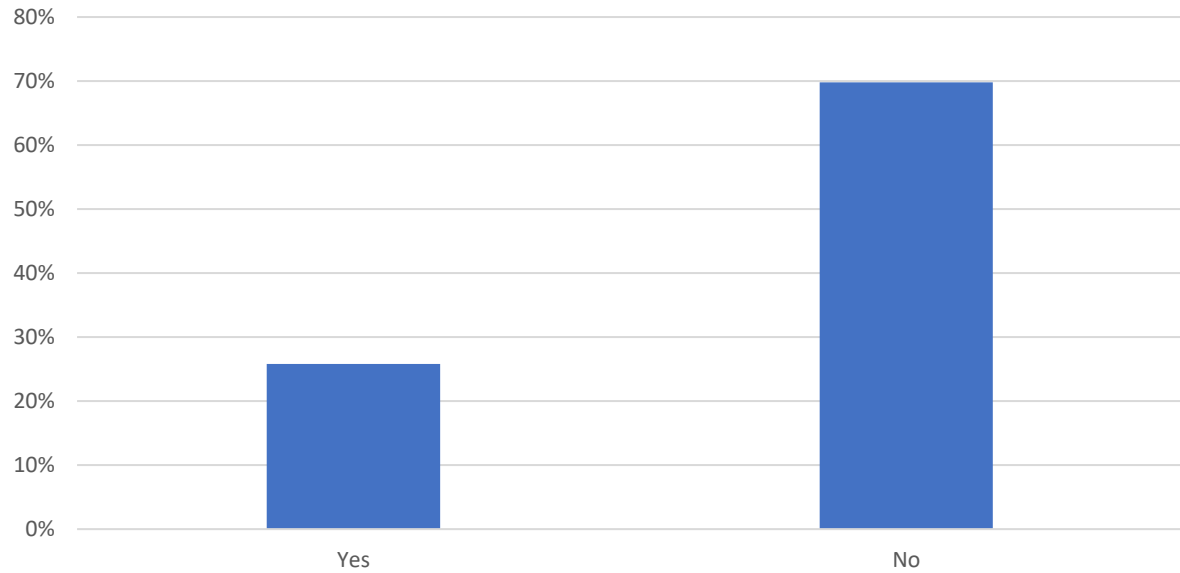
Survey Respondent selected comments:

- "Facebook is a massive threat, as they can offer segmentation by job title it's only a matter of time"

- "The online recruitment market is booming in the eyes of funders and the global recruitment market is constantly growing. LinkedIn has paved the way for a larger global online recruitment market size, which was thought to be $2 billion circa, now looks more like $25 billion. Lots of acquisitions make the market prime for start up investment."

- "People are less willing to take a phone call and discuss their needs. The activity of posting jobs is definitely heading into an automated posting / automated pay world."

- "New Technology. Growing recognition. Investment in partnerships. Indeed continuing to isolate itself. Staffing + ATS are growing aware & looking for alternatives."

- "I'm eager to see how matching technology is integrated /executed across service - Indeed and ZipRecruiter both claim to have similar abilities and beta features are showing up in their sourcing tools while the programmatic ppa providers emphasize exclusive advantages"

- "Lots of little ATS vendors are convincing our clients that they do not need to do additional advertising because they distribute jobs to aggregators and niche sites. We think that in the not too distant future, our clients will realize that they will need the kind of marketing and advertising expertise we provide."

- "We continue to be very interested and intrigued with the way in which programmatic ad buying trends are evolving into the job ad space."

- "Job board, recruiters, and other software used to connect candidates to good paying jobs is broken. I feel that everyone is scrambling around trying to find new ways to automate this unique connection between two living people. Recruiters cost too much per hire and job board are very unsuccessful. Much of the software that is being created has built an enormous mountain of great looking options that look great from the outside but are not performing at a significant rate"

- "The recruitment industry need to become much more intelligent as it pertains to evaluating the ROI job board bring to their organizations. # of placements/hires only tells a portion of the story. Conversion rates are what really matter."

- "Marketing has become expensive and more difficult"

- "Small and Mid-size companies are starting to understand that job-board and recruiting technology can be really helpful and efficient in hiring. ATS and other tech will become more affordable and accessible to small and mid-size businesses in the near future."

- "New solutions are driving price down. employers are also able to do more on their own with free tools. The economy is also a factor that will influence our business. I think it's more likely that the economy will go down vs. up. We are fueling growth through too much debt. Once this slows, it may adversely affect job creation. This is the only big negative I see. Otherwise, I remain optimistic."

- "As an aggregator with low volume but high quality, we are being hurt by programmatic ad buying and agencies. We receive less offers, and lose 15% of our revenue for the same amount of clicks delivered."

- "We struggled a lot with technology and have finally created a great foundation for this. We're excited to be back into marketing/sales mode, so to speak. I believe that hiring in our space is in high demand due to very high turnover."

About Job Board Doctor:

Job Board Doctor is a **consulting service** for job boards and online recruiting sites. It provides **strategic and tactical help** in the following areas:

- Strategic planning & direction
- Product development and launch
- Site branding & positioning
- Marketing & sales

- Social media
- Content creation
- Site and user interface analysis

The Job Board Doctor **is Jeff Dickey-Chasins**, a veteran of the job board, publishing, and e-learning industries. Jeff was the original marketing director for Dice.com, growing it from $7 million to $65+ million in three years. He has worked with 450+ job boards and HR-related sites over the past 20 years, in almost every sector, including finance, technology, education, health care, sales and marketing, energy, and specific geographic regions. He has published research, e-books, and blog posts on almost every aspect of the industry. He also speaks at industry conferences on key topics in the online recruiting industry.

Learn more at: www.jobboarddoctor.com

About Jobg8:

The Jobg8 marketplace is a unique service within the Job Board industry and addresses three key challenges facing Job Board operators today:

Job Boards operate in a fragmented market of over 50,000 job boards from various countries. This makes it difficult for advertisers to know where to post Jobs and for Job Seekers to know where to look for relevant positions.

Driving Traffic to your Job Board can be expensive and includes no guarantee that the added Traffic will yield the qualified applicants that your advertisers demand.

Although many Job Boards can deliver clicks and "job views", what is truly required is delivering qualified applicants to your advertisers. Your advertisers would rather review a smaller list of qualified CVs, than a large number of unqualified applications.

Learn more at: www.jobg8.com