



Global Recruiting Site Trends Survey Results

2020-21

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 recruitment marketing industry. This year we had a total of 128 respondents from every region of the world, including Europe, Asia, North America, and Africa.

The survey was distributed and promoted to recruiting sites, job boards, and related sites and services. The questionnaire had 31 questions, and required approximately 10 minutes to complete.

The survey included questions covering:

- Perceived threats and opportunities
- Effects of the COVID pandemic
- Demographics
- Largest sources of revenue
- Business models
- 2020-21 business plans

Survey responses were collected in September and October 2020. The AIM Group, an international business intelligence group serving recruitment marketplaces, provided support in collecting survey responses.

Executive Summary

Here are some of the **key findings** from the 2020-2021 survey:

- Unsurprisingly, the economic effect of the COVID 19 pandemic has been primarily negative: 59% of respondents have seen **revenue decrease** in 2020, compared to the same time period in 2019; 18% of those have seen revenue drop 50% or more.
- In the past 30 days, 63% of respondents have seen their **revenue increase**
- 25% of respondents have either **cut staff temporarily or given away products and services for free** in response to the pandemic
- **Duration-based job postings** (single posts, packages, or subscriptions) are the top revenue producers for 68% of the respondents
- **Job alerts** continue to produce the highest quality traffic for most respondents
- 20% of respondents now offer **pay-per-application** services to their clients
- 71% of respondents view the ongoing effects of the COVID 19 pandemic as their most significant threat in the coming 12-24 months
- Only 20% of respondents **feel pessimistic** about their opportunities for the coming year
- 68% of respondents expect their **rate structure to stay the same** for the coming year

Key respondent quotes:

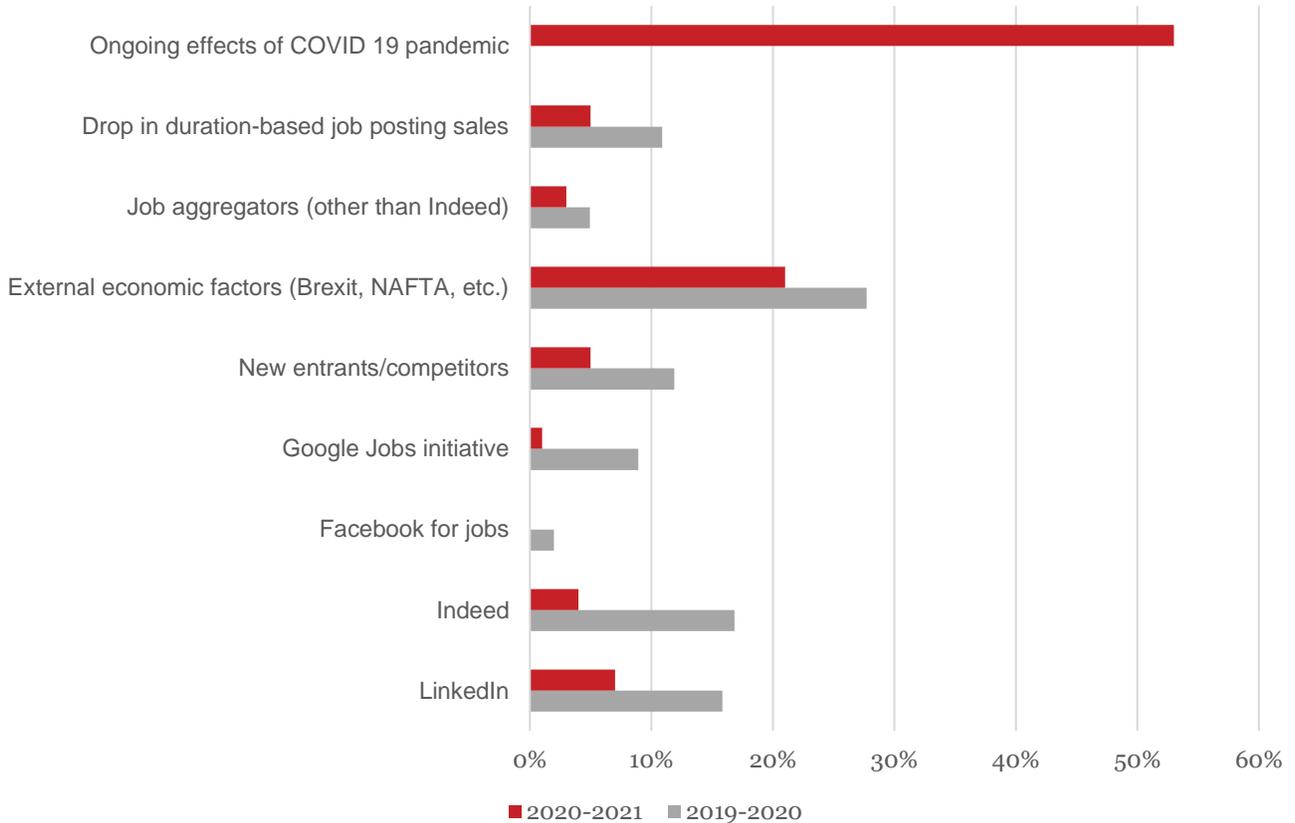
- *Hopefully this pandemic will bring in a faster change in recruitment advertising and we'll come closer to the e-commerce landscape.*
- *I think a lot of digital platforms are black holes, but the internal recruiters/HR prefer shiny objects that are less efficient.*
- *Watch to see who survives these times. Impact on work now that "work" may never be the same with the increase in remote work.*
- *Smaller players will close. Larger ones will be challenged to deliver on client expectations consistently. Customers will expect more for less as marketing budgets decrease. Amazon + similar warehouse/gig roles will continue to dominate the space.*
- *High turnover and layoffs will impact firms who do not have deep contacts with their customers and prospects.*
- *More direct employers using smaller niche job boards to simply direct candidates to their career websites to fill jobs and build talent pool. They do not need all the bells and whistles. This will be reflected in the price they are prepared to pay for the ad.*
- *The survey makes clear that ordinary job boards are loathed for a reason. They're archaic and don't fit the modern mold for communication between humans.*

- *More and more programmatic! CPA will increasingly become a critical measure of quality.*
- *By operating in a niche in my local market, understanding and speaking the language of employers and candidates, offering products and services that perform and meet new technology standards, this will keep making the difference against the bigger international players*
- *A lot of the niche sites will struggle in the next 12 months. Companies will not be hiring as much so those sites will struggle. Also companies are focusing on talent experience so poor job board experiences with multiple redirects won't be tolerated moving forward*
- *The effects of Covid 19 on construction investment have not yet transpired and as such it's not clear what the real pool of candidates and employer requirements are*
- *Development of Freelancer advertising*
- *Significant decrease in number of talent acquisition employees including recruiters will likely lead to faster and greater adoption of automation by employers and their vendors like recruitment advertising agencies. It will be more important than ever to be able to automate the posting of jobs and delivery of candidates. We feel we're well positioned for that for an organization of our size.*

Comparing 2019-20 Survey to 2020-21 Survey results:

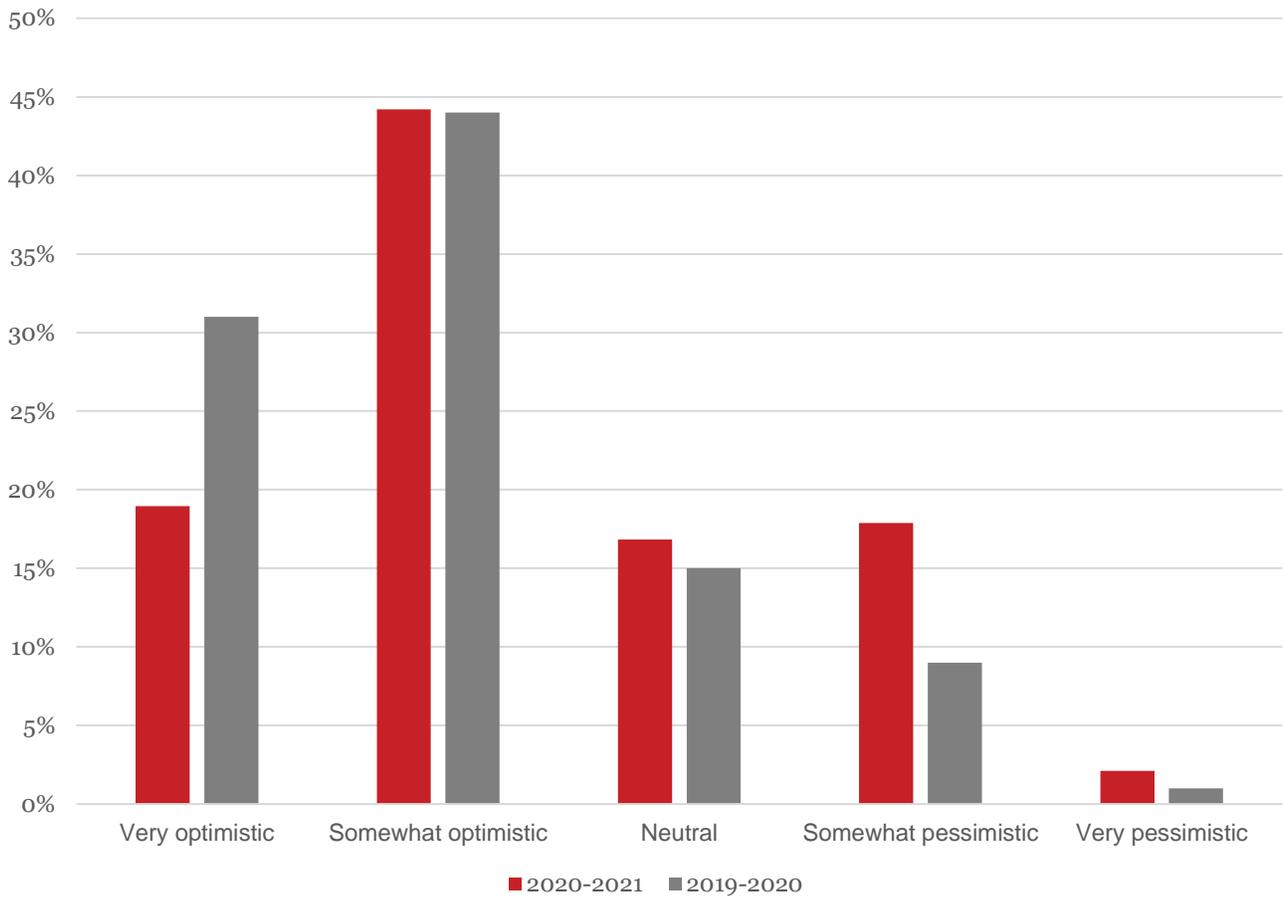
The effect of the COVID 19 pandemic has been felt in survey responses, particularly when compared to last year's survey. Below are some of the most notable changes:

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



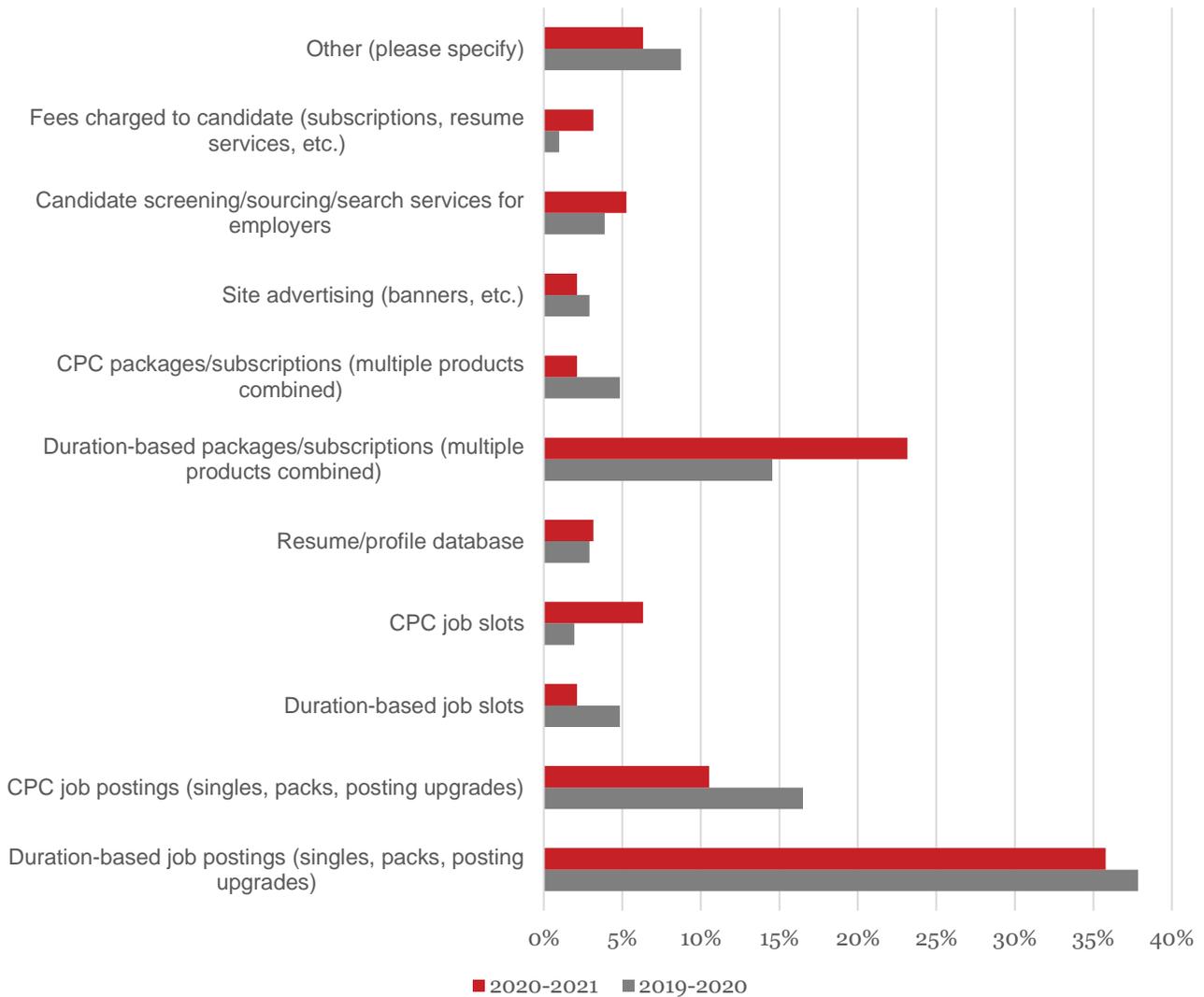
Apart from the obvious dominance of COVID 19 in the 2020-21 responses regarding threats, note the decreases for Indeed, Facebook, Google for Jobs, and LinkedIn in being seen as threats.

What are your feelings for your organization's opportunities during the next 12 months?



It's not surprising to see an increase in pessimism in this year's response; it's coupled with a decrease in the 'very optimistic' response compared to last year.

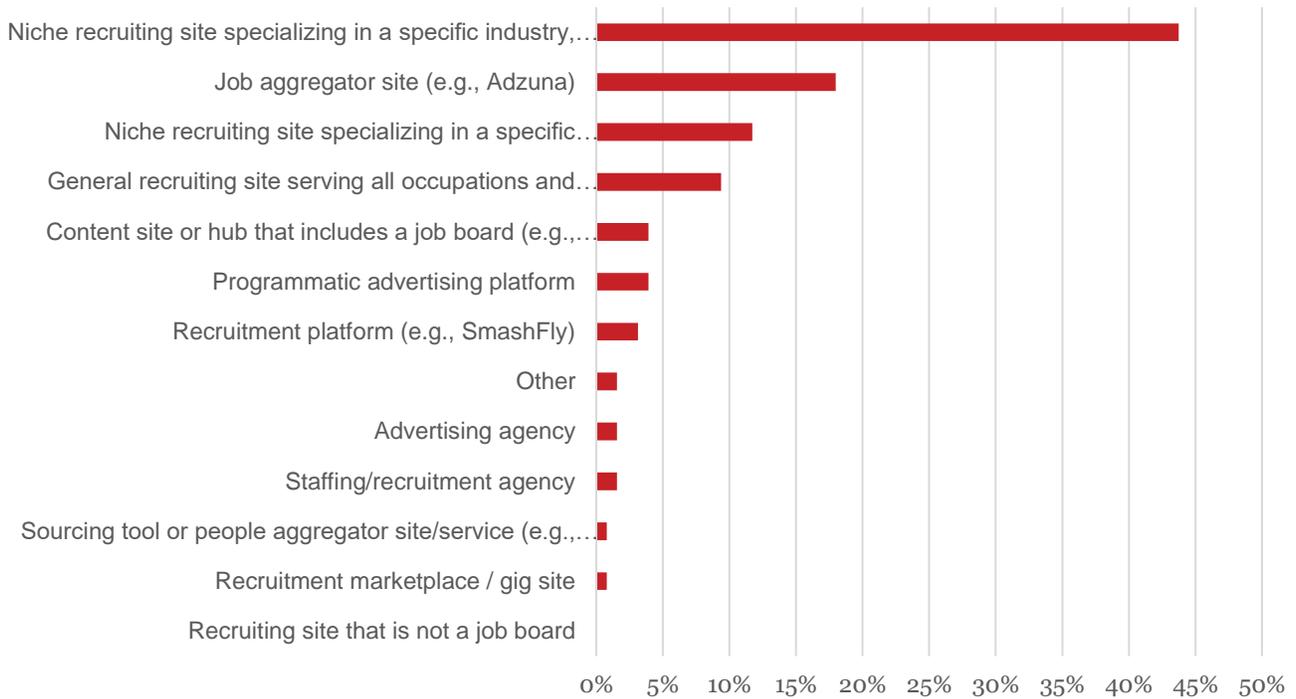
Which of the following has been your ***largest*** source of revenue in the past 12 months?



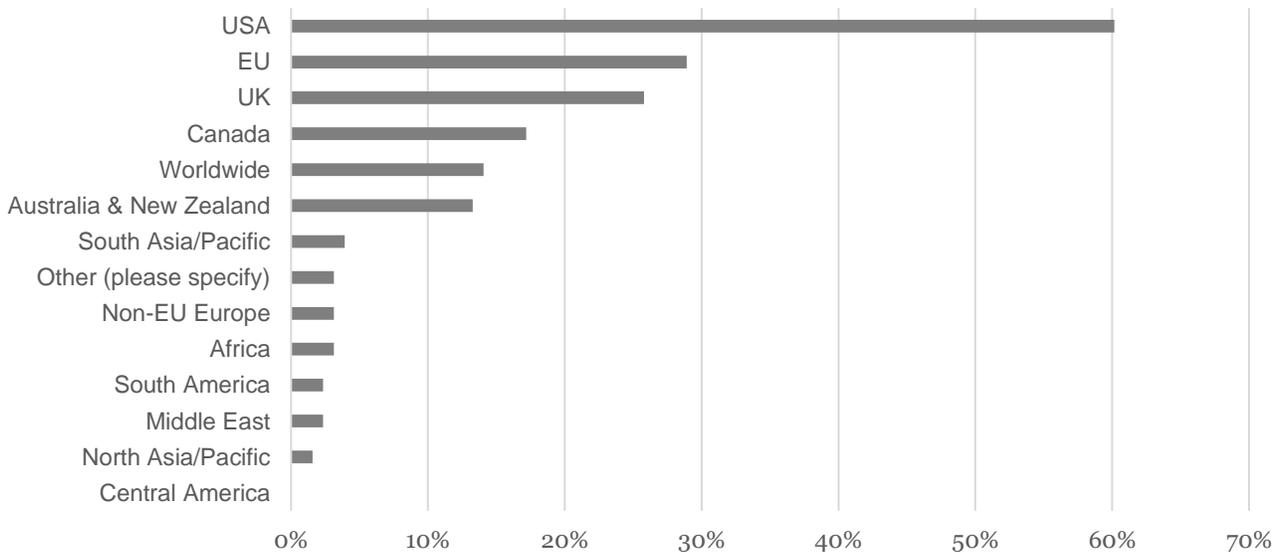
Note the increase in CPC job slots, candidate screening, and duration-based packages and subscriptions.

The Complete 2020-2021 Survey Results:

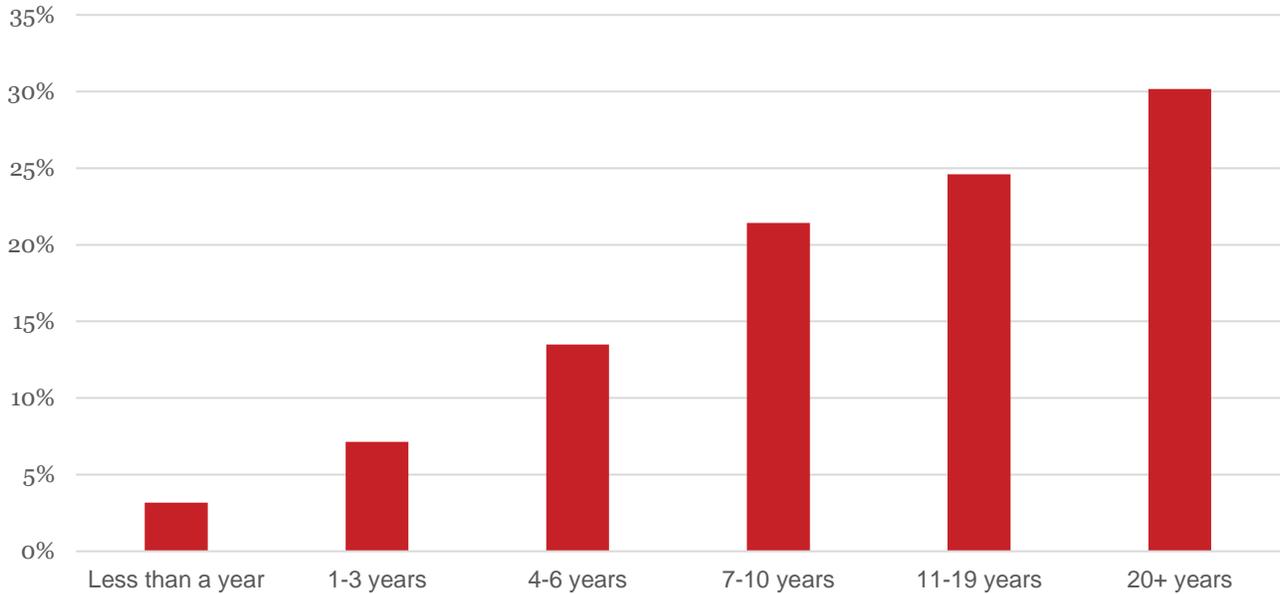
Which of the following *best* describes your organization?



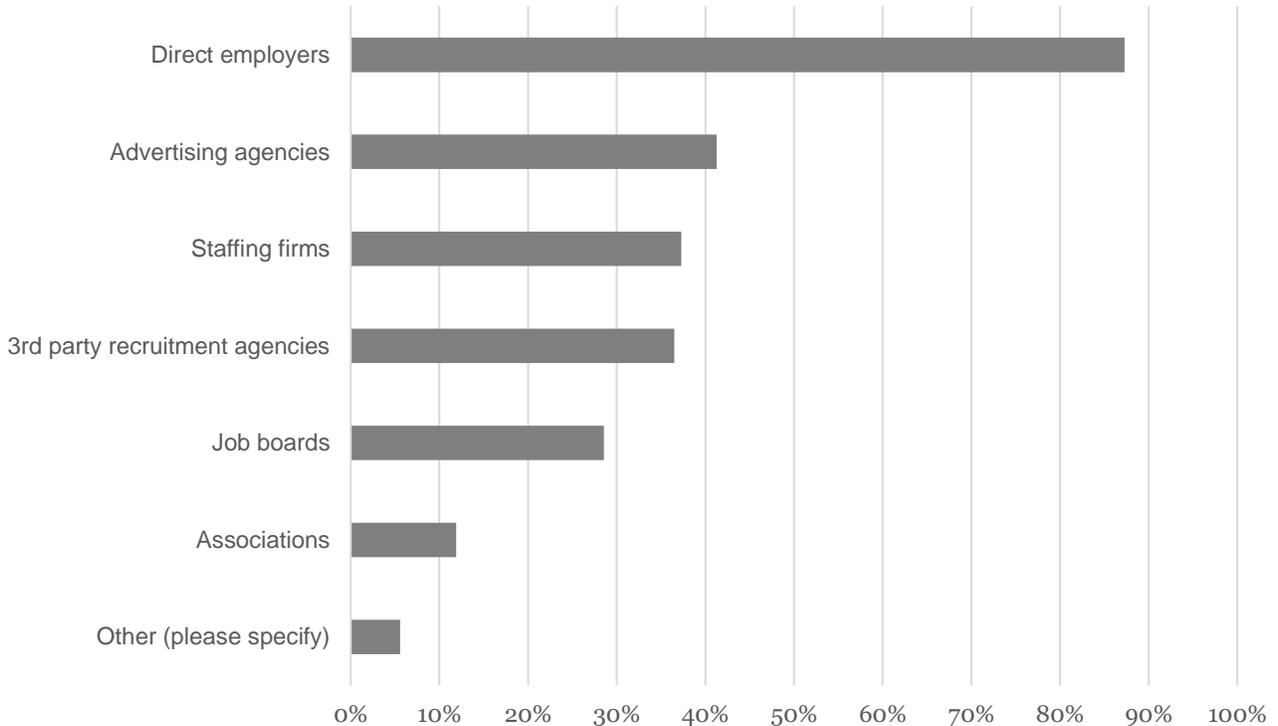
In which locations do the candidates you primarily target reside? (Check all that apply)



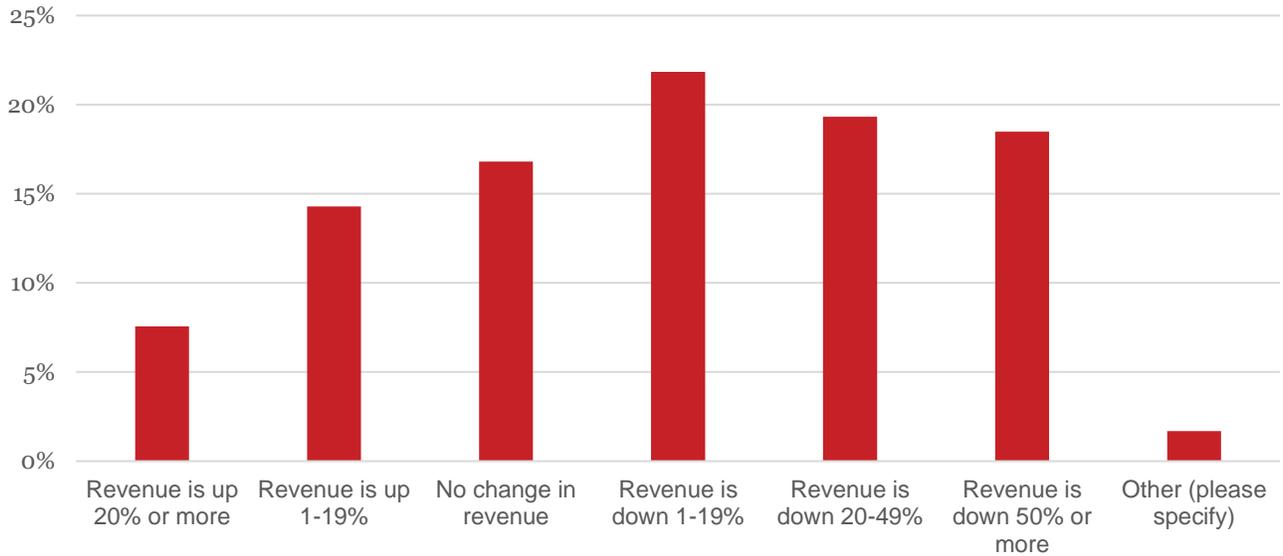
How long has your site or service been operating?



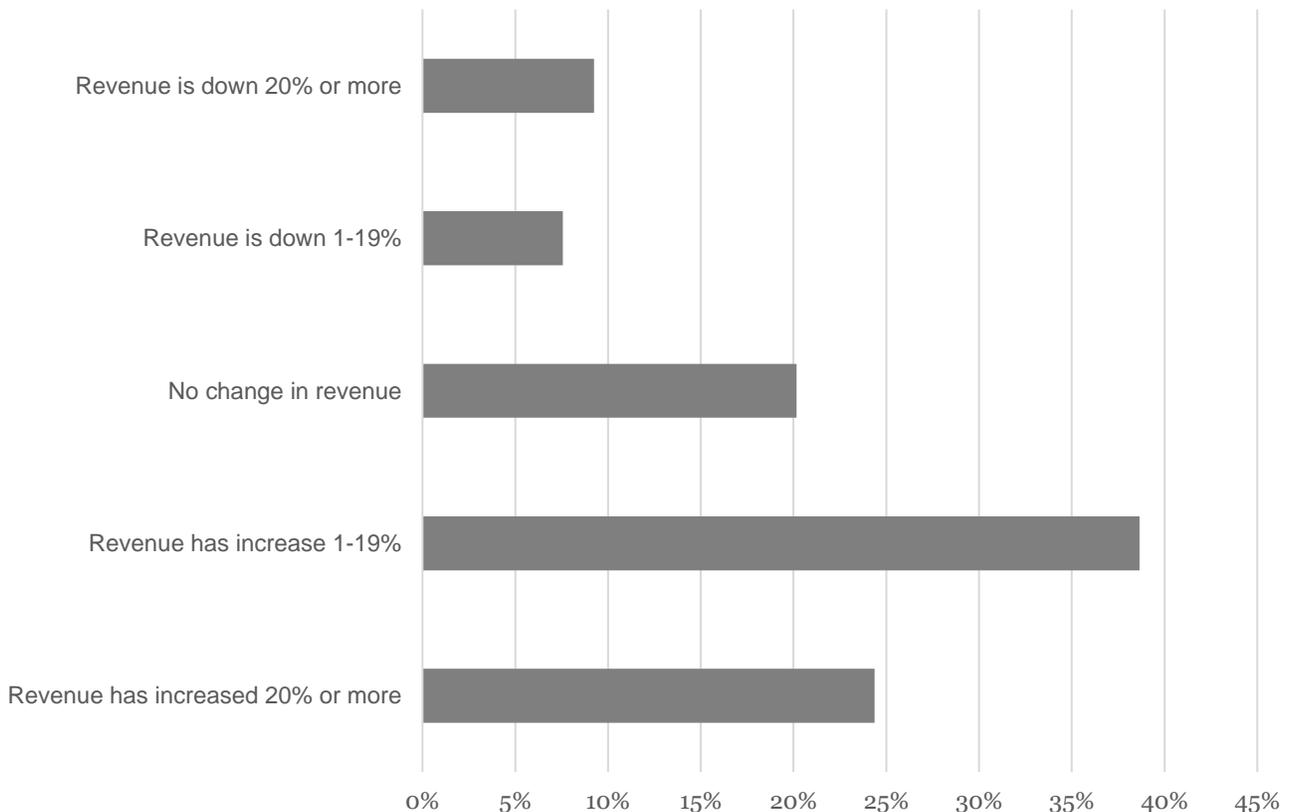
Which of the following types of clients do your business primarily target? (Check all that apply)



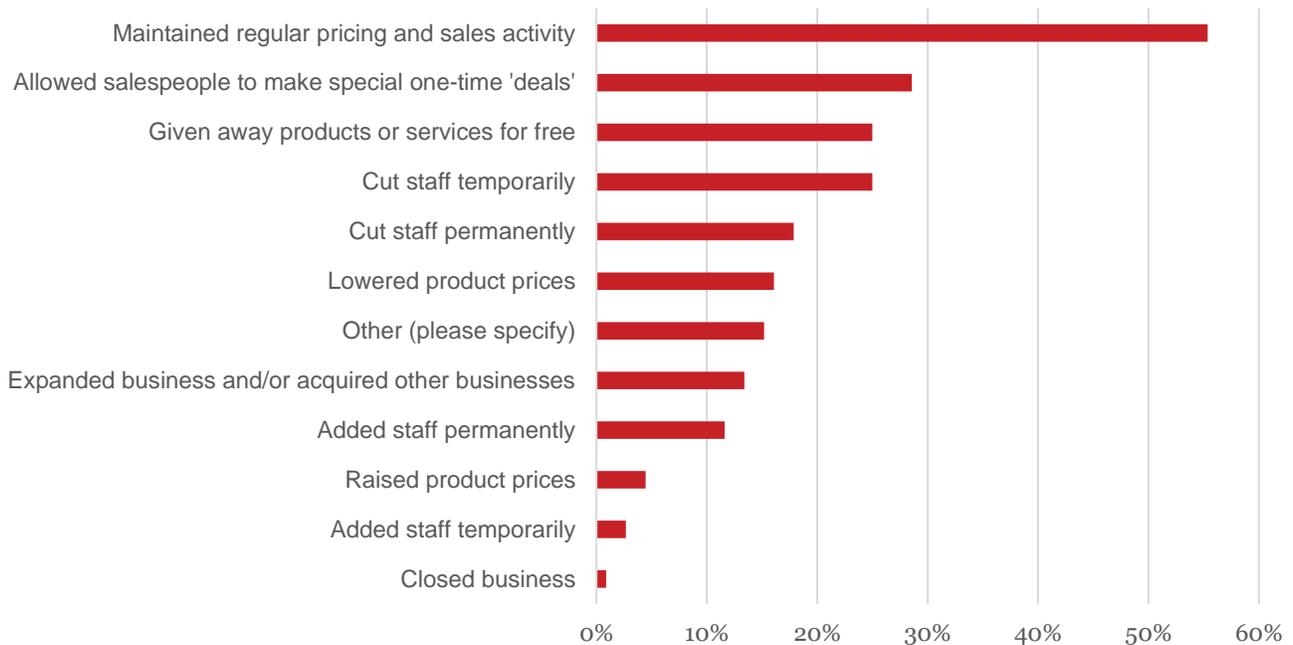
The COVID 19 pandemic has had both negative and positive effects on the recruiting industry. Compared to the same period in 2019, how has your annual revenue changed in 2020?



In the *past 30 days*, how has your revenue changed?



Which of the following have you done in response to the effects of the COVID 19 pandemic? (Check all that apply)



“Other” responses included the following:

Hiring freeze, reduced marketing expenses

Adjusted payroll and focused on needs vs. wants to keep organization running.

Added new products

Stressed sales staff to keep close touch with customers and prospects

Worked on site upgrades and expansion

Extended package expiry dates

(1) Accessed Government income support package for affected staff (our revenue initially suffered a big hit, but it has since bounced back, and we anticipate exiting the Government support package over the next 30 days) (2) We started a weekly trivia quiz (relevant to our industry) to keep job seekers interested and using our services while COVID bounced everything around.

Renegotiated lease, moved to 100% virtual operations, moved to permanent part-time employees instead of full-time people.

working a lot harder and trying to work a bit smarter re using B2B direct marketing firm

reduction in staff hours/days per week. Went into new product and technical areas

Reduced operating expenditures, license costs, etc.

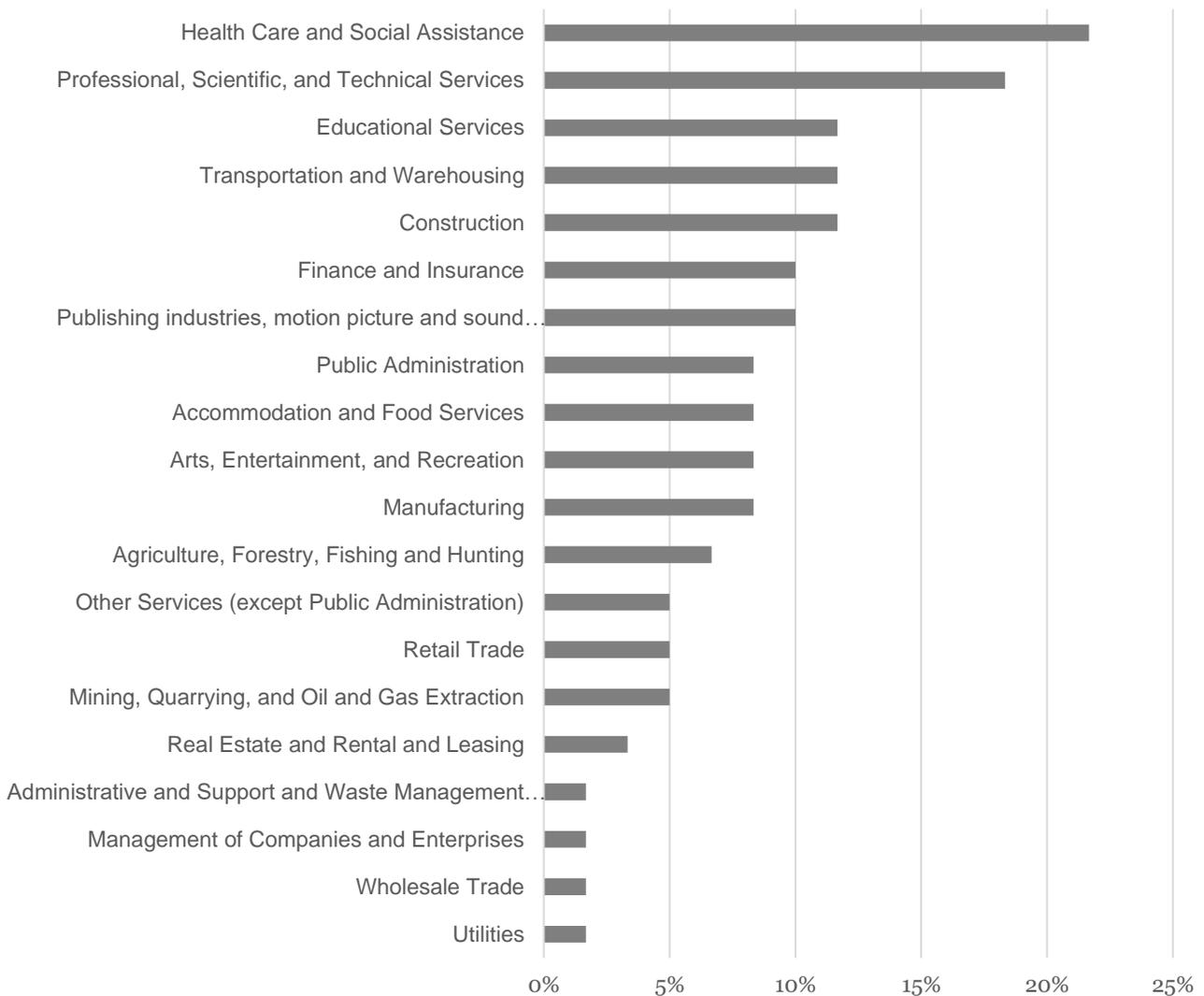
Reduced salaries to avoid layoffs

Allowed employers to pause their accounts/payments

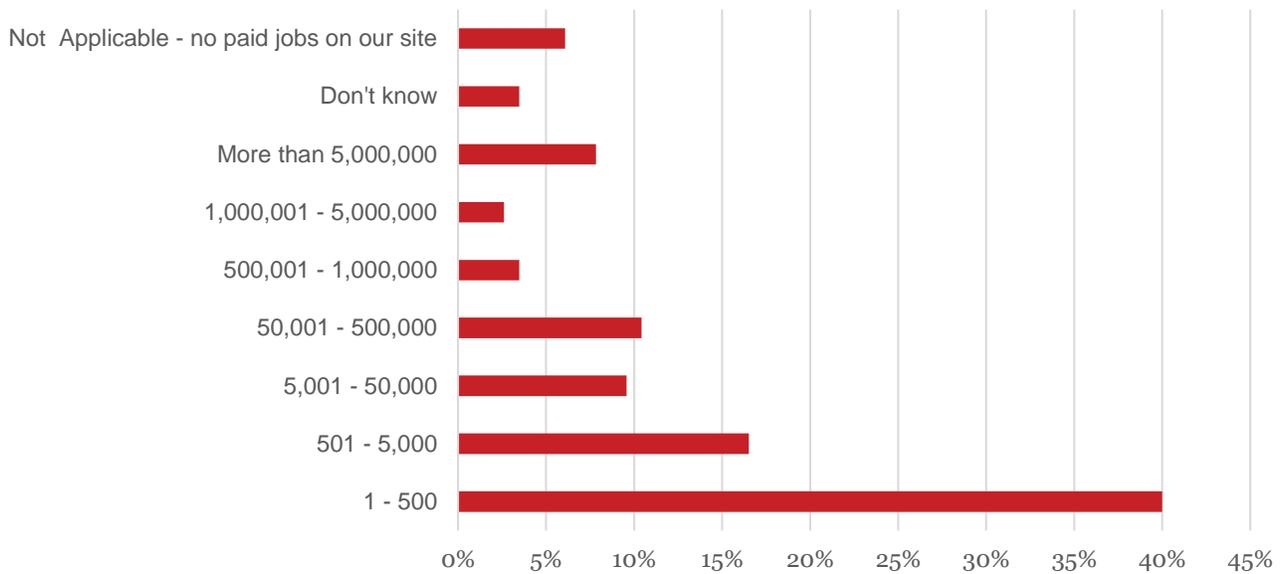
Does your business target a particular industry or sector?



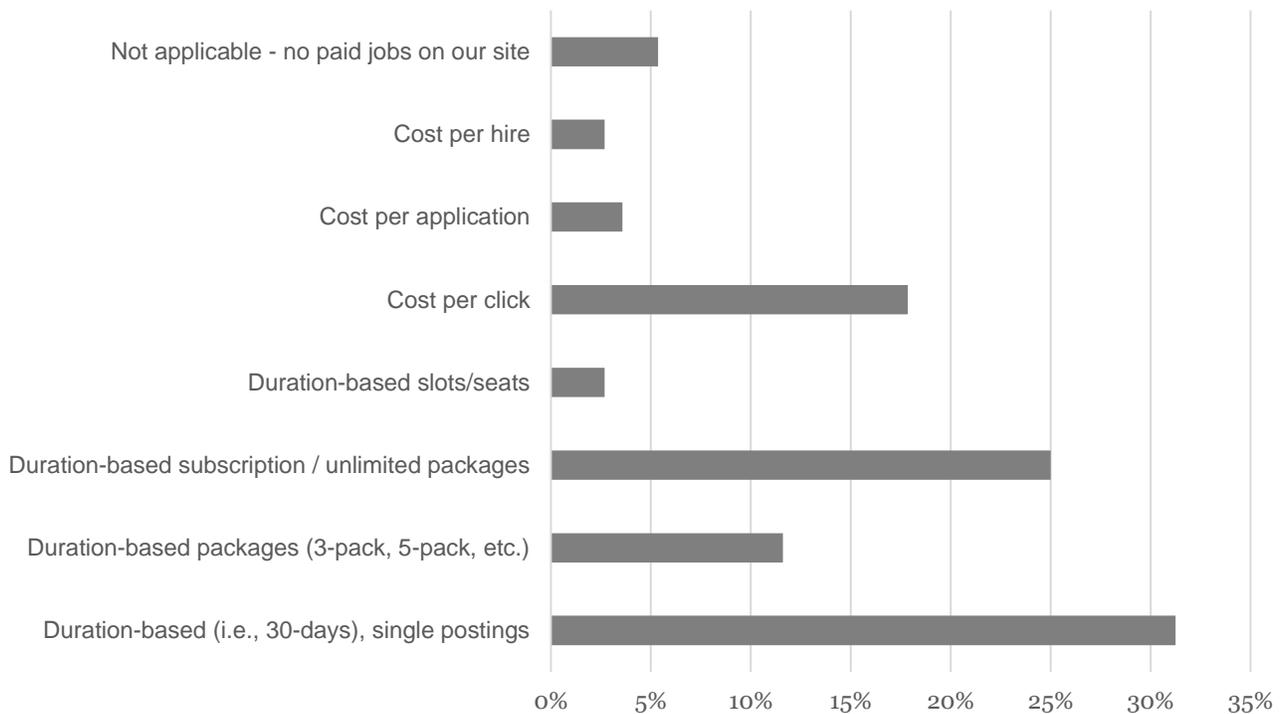
If your business targets a particular industry or sector, please indicate what it is:



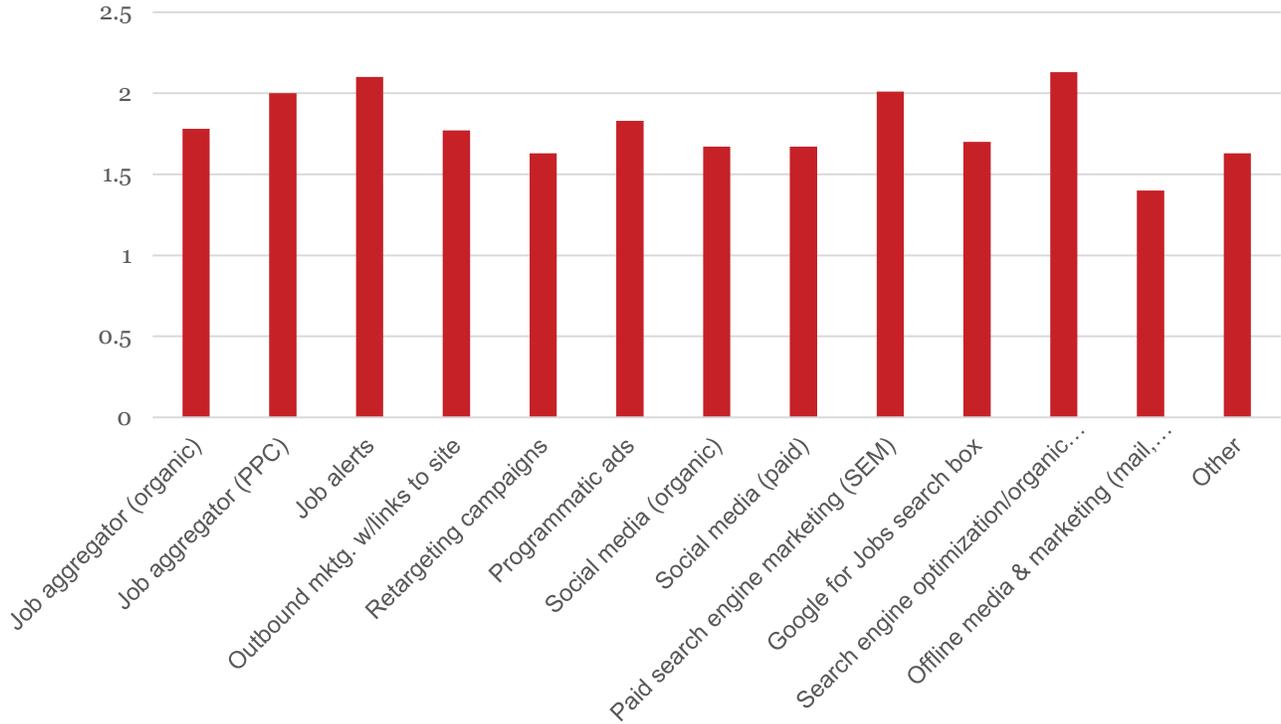
On average, how many new *paid* jobs (pay per post, pay for performance, or both) are posted on your site or service each month?



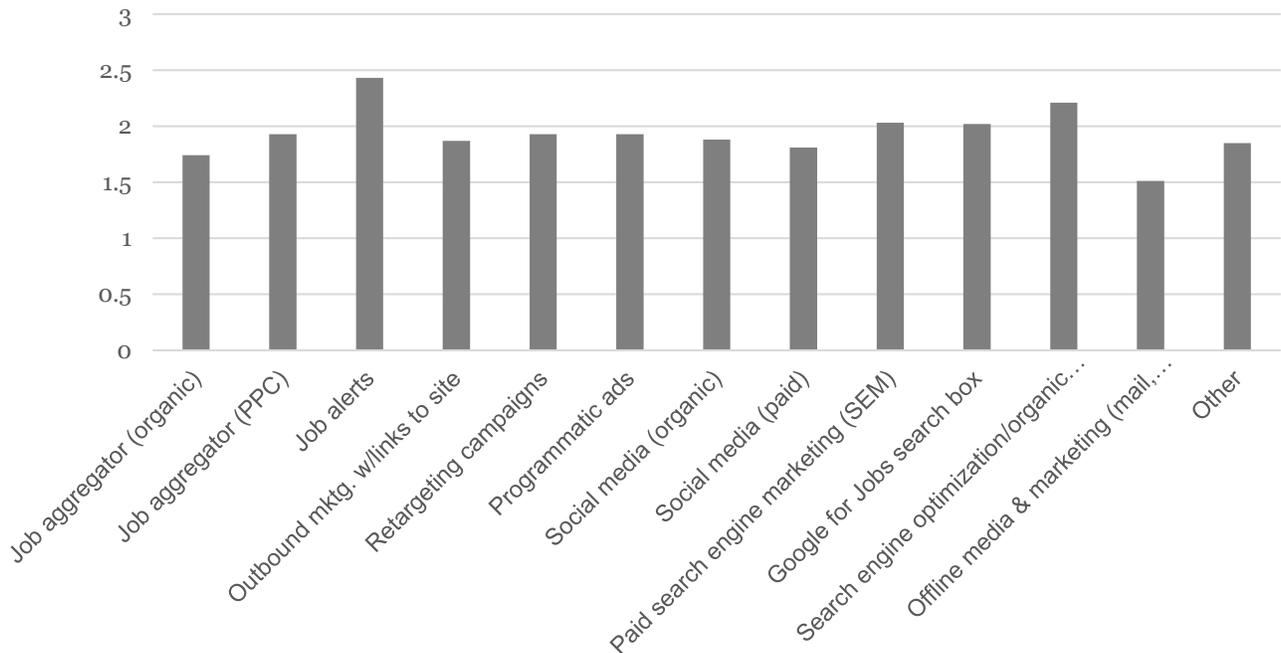
Regarding your *paid* jobs, what type of job posting does the *majority* (most revenue generated during past 12 months) represent?



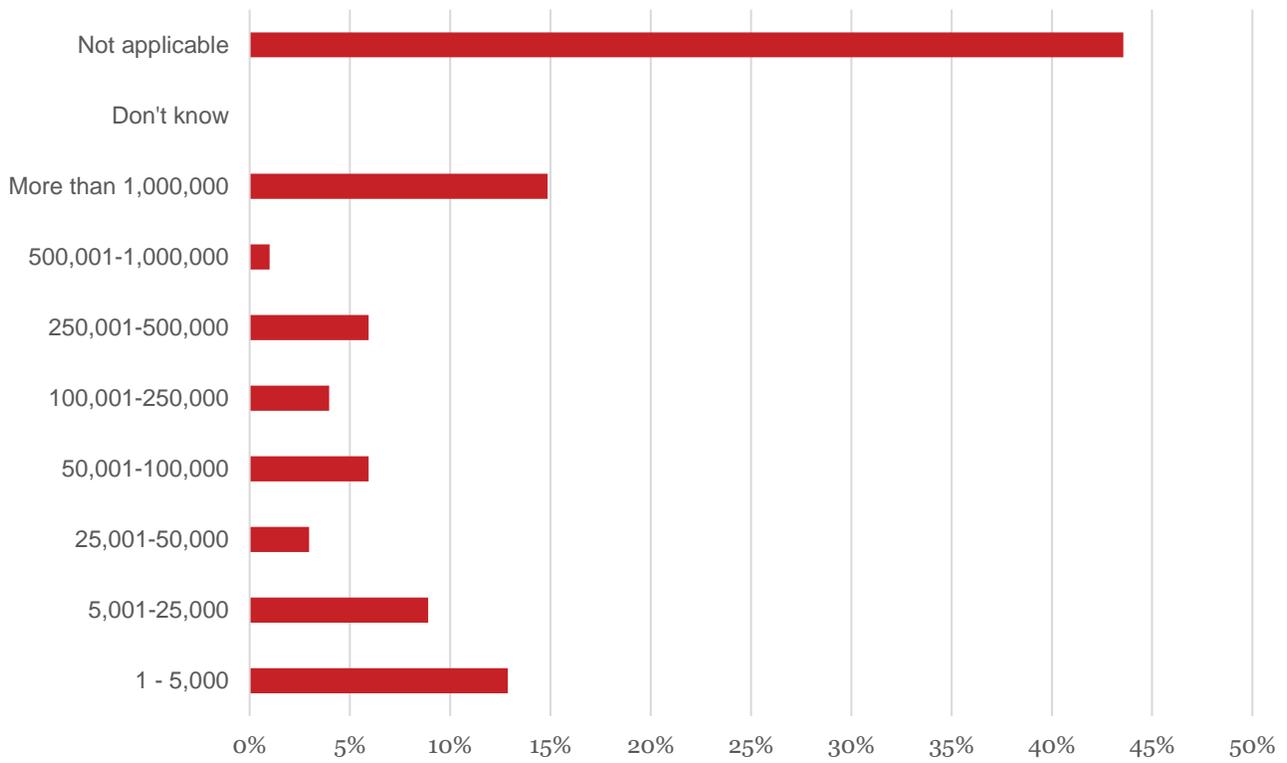
How would you rate the following sources of traffic to your site, based on the *volume* of traffic generated?



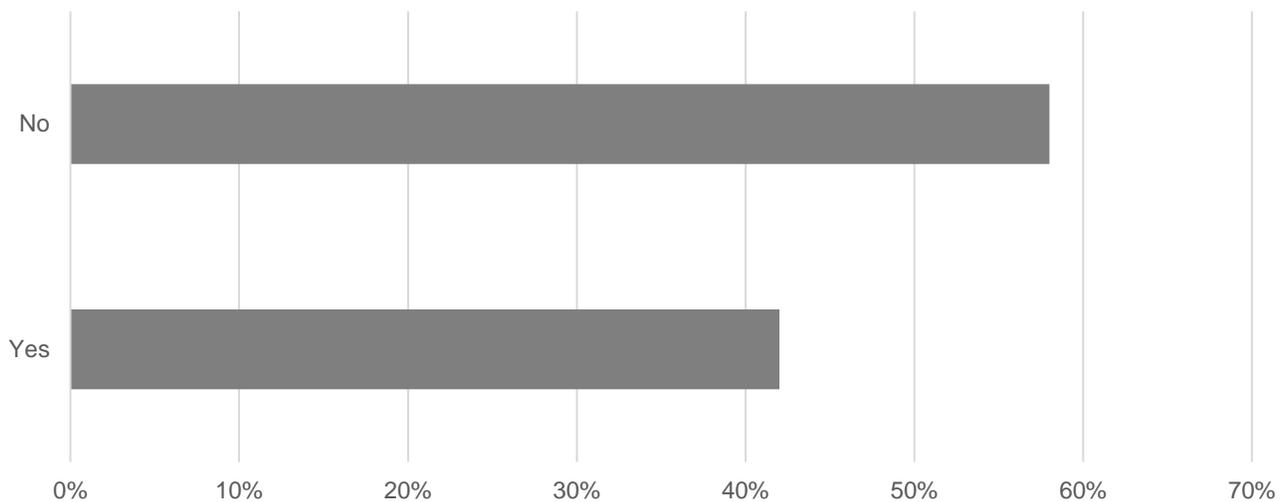
How would you rate the following sources of traffic to your site, based on the *quality* of traffic generated?



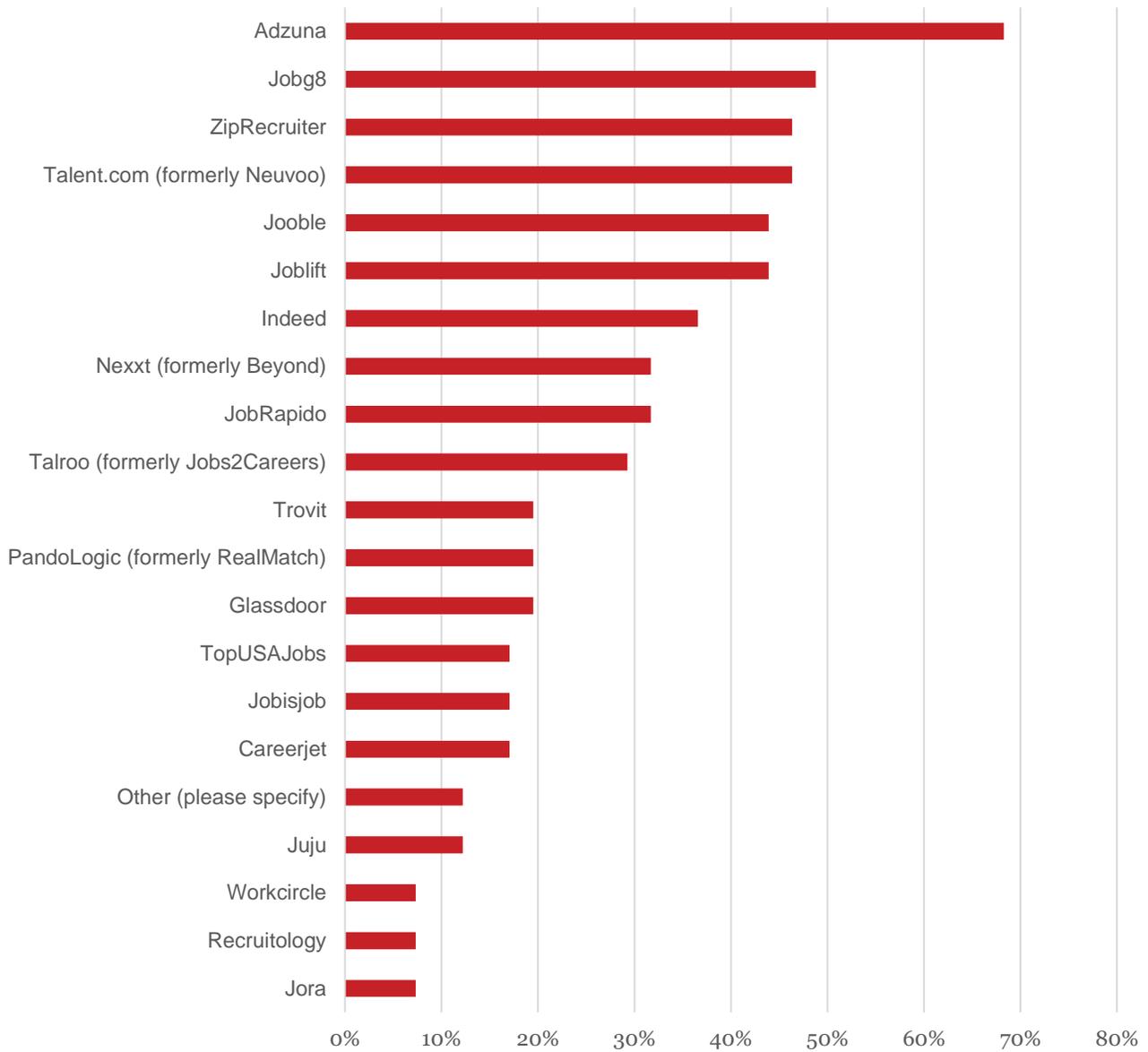
If your service offers a resume or candidate profile database that is accessible by employers, how many resumes or profiles are currently stored in the database?



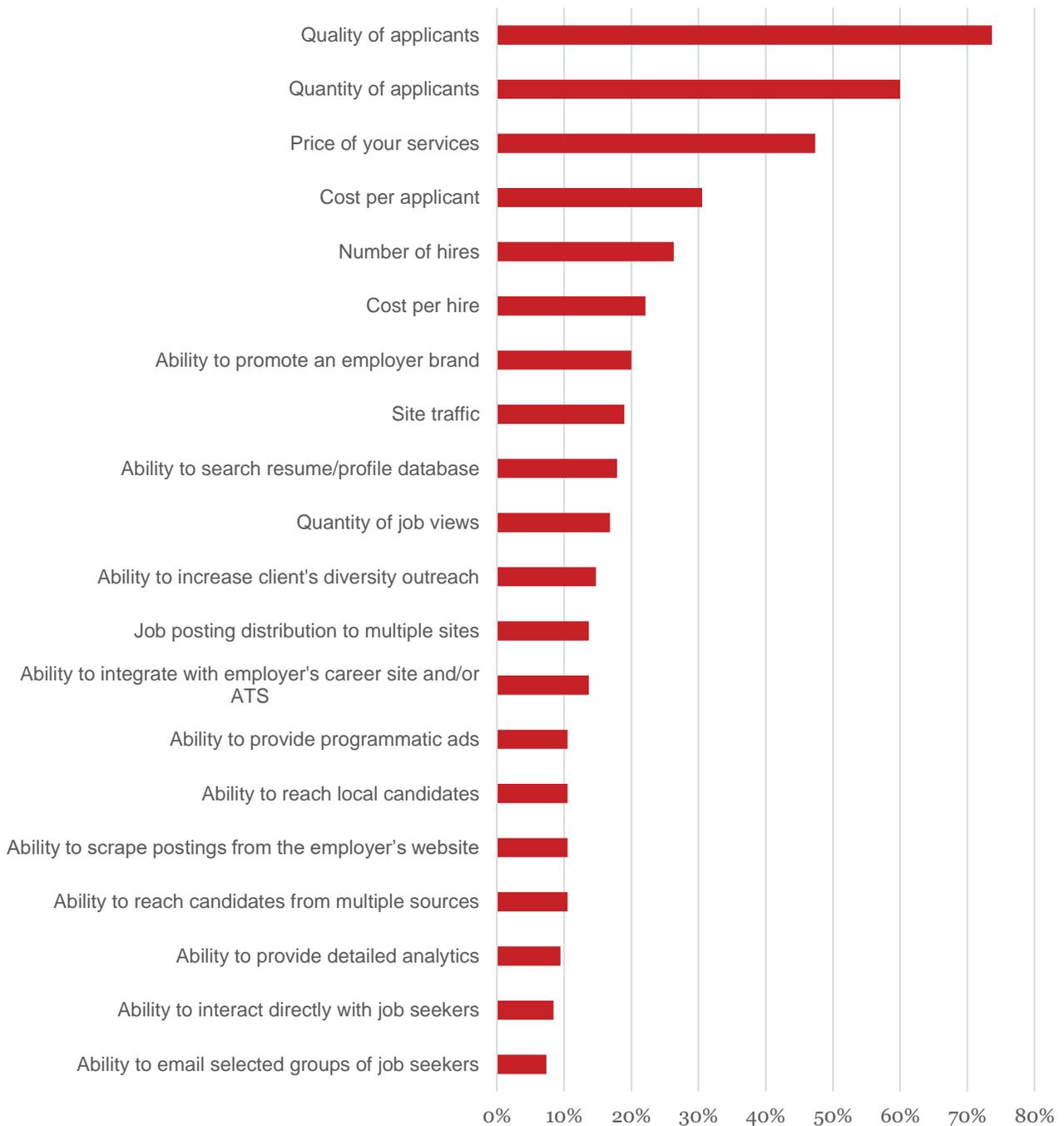
Do you currently use an aggregator to buy or sell traffic?



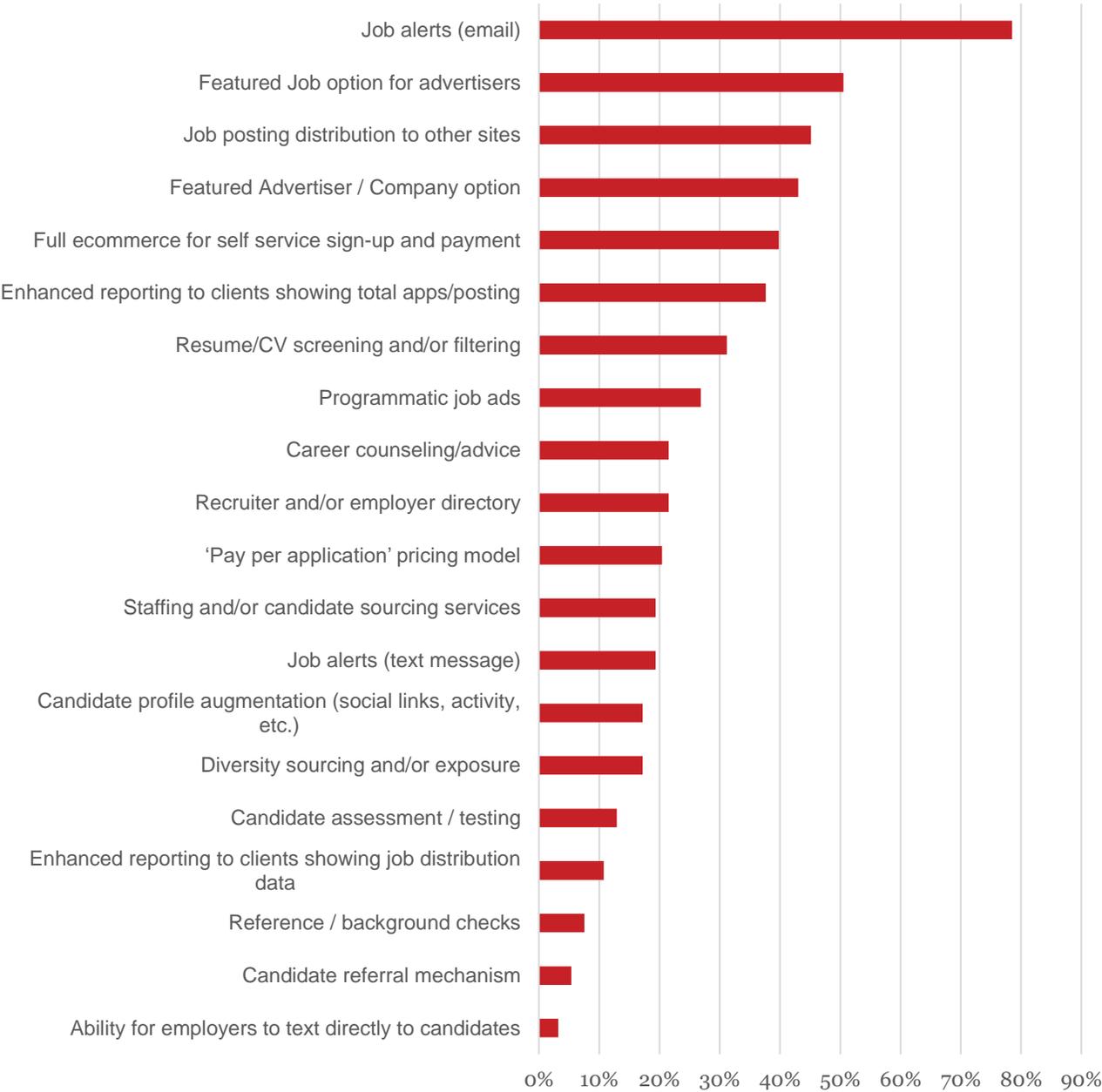
Which of the following aggregators do you use? (Check all that apply)



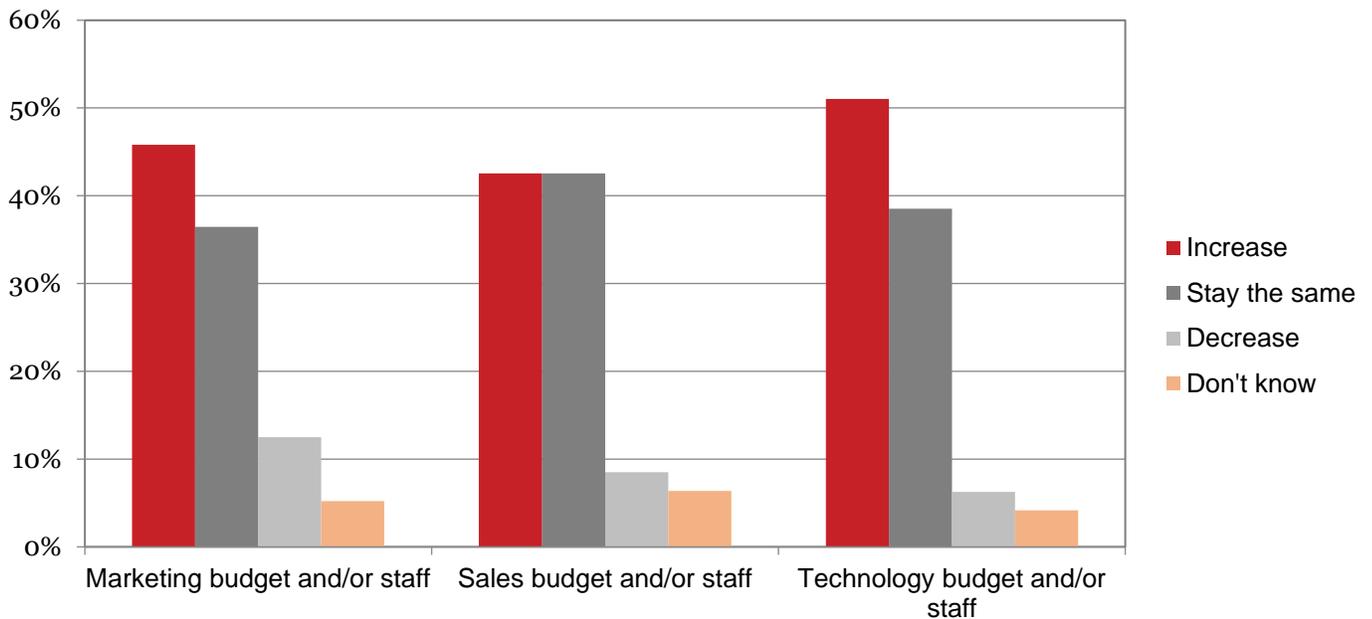
In general, which of the following criteria are **most important to your clients with regard to using or renewing your recruiting services? (Select the top 3)**



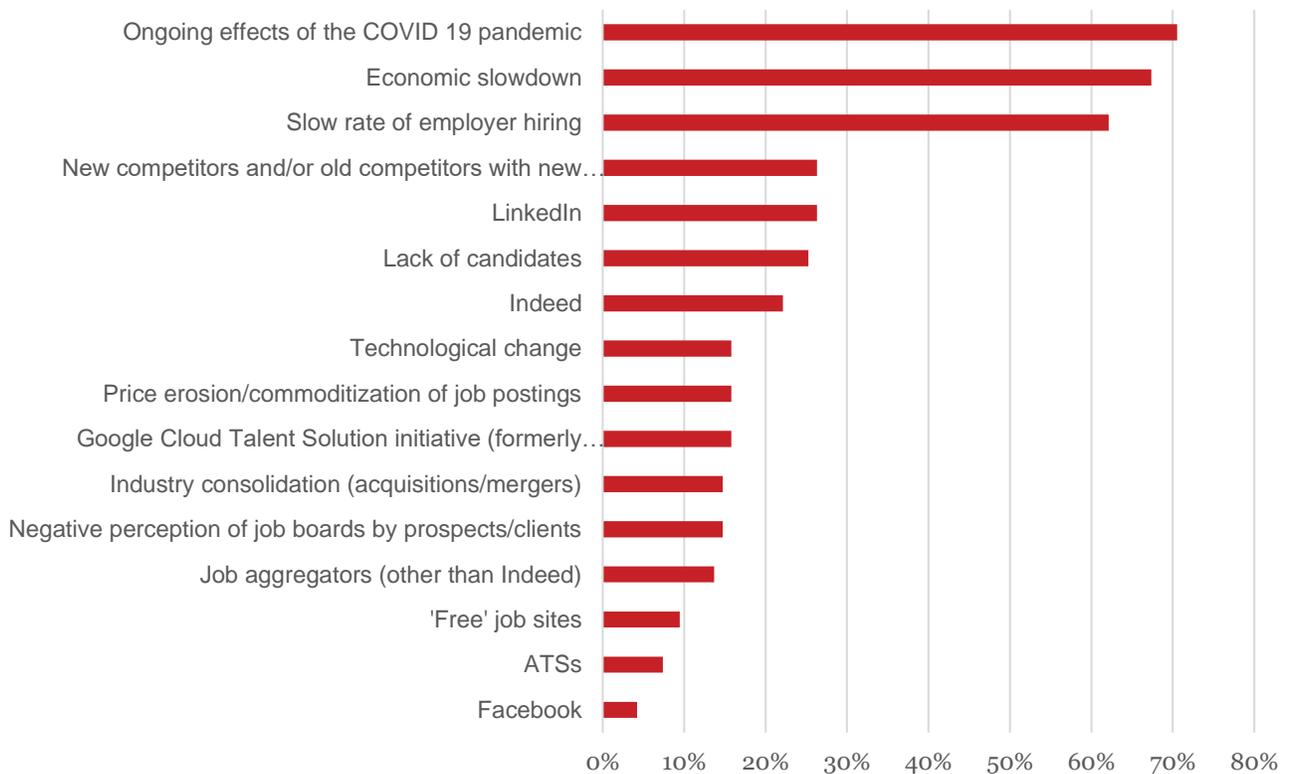
Which of the following services do you currently offer to your clients and candidates? (Check all that apply)



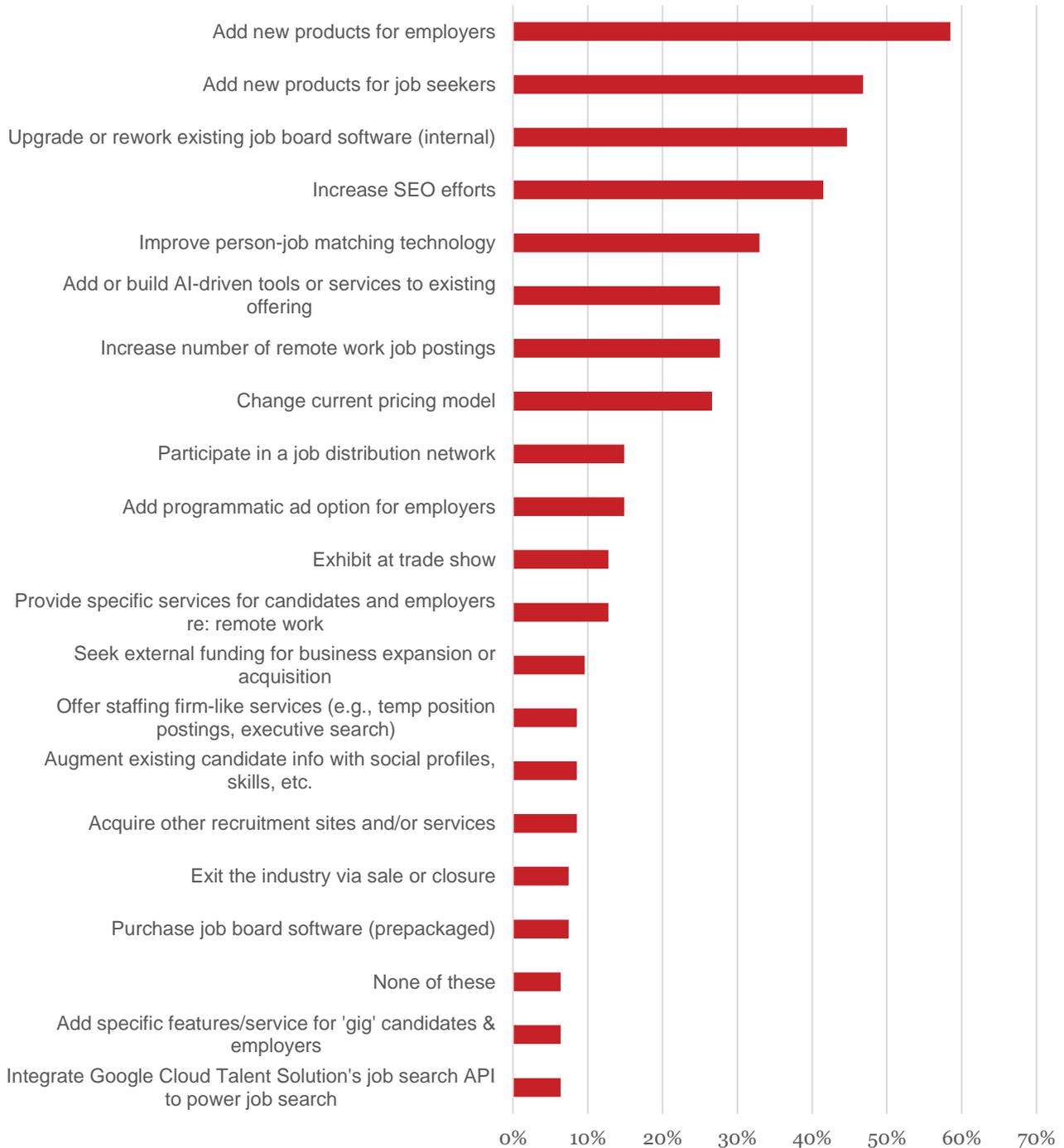
Over the next 12 months, how do you predict the following elements of your business to change?



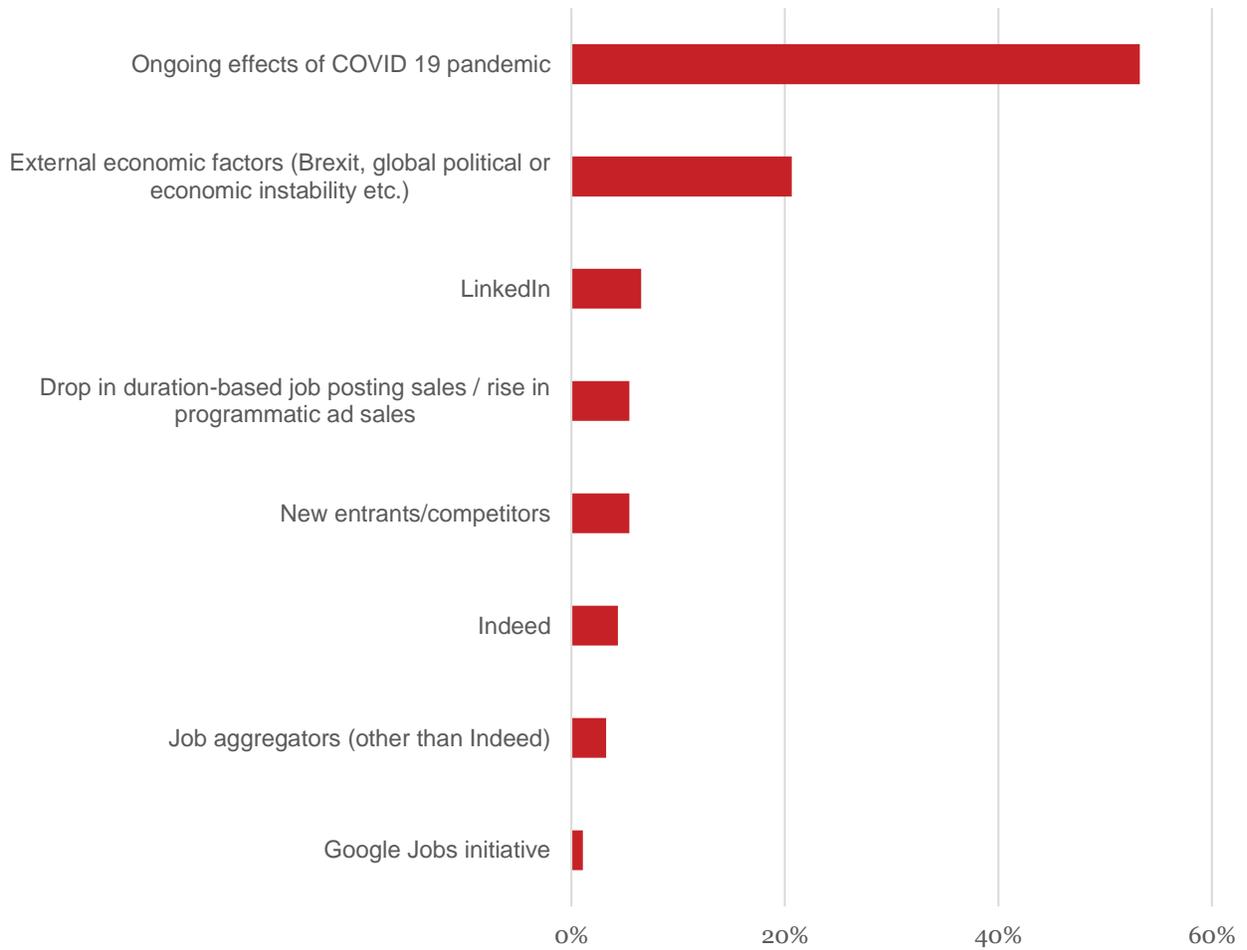
Which of the following do you see as the most significant *threats* to your business in the next 12 to 24 months? (Check all that apply)



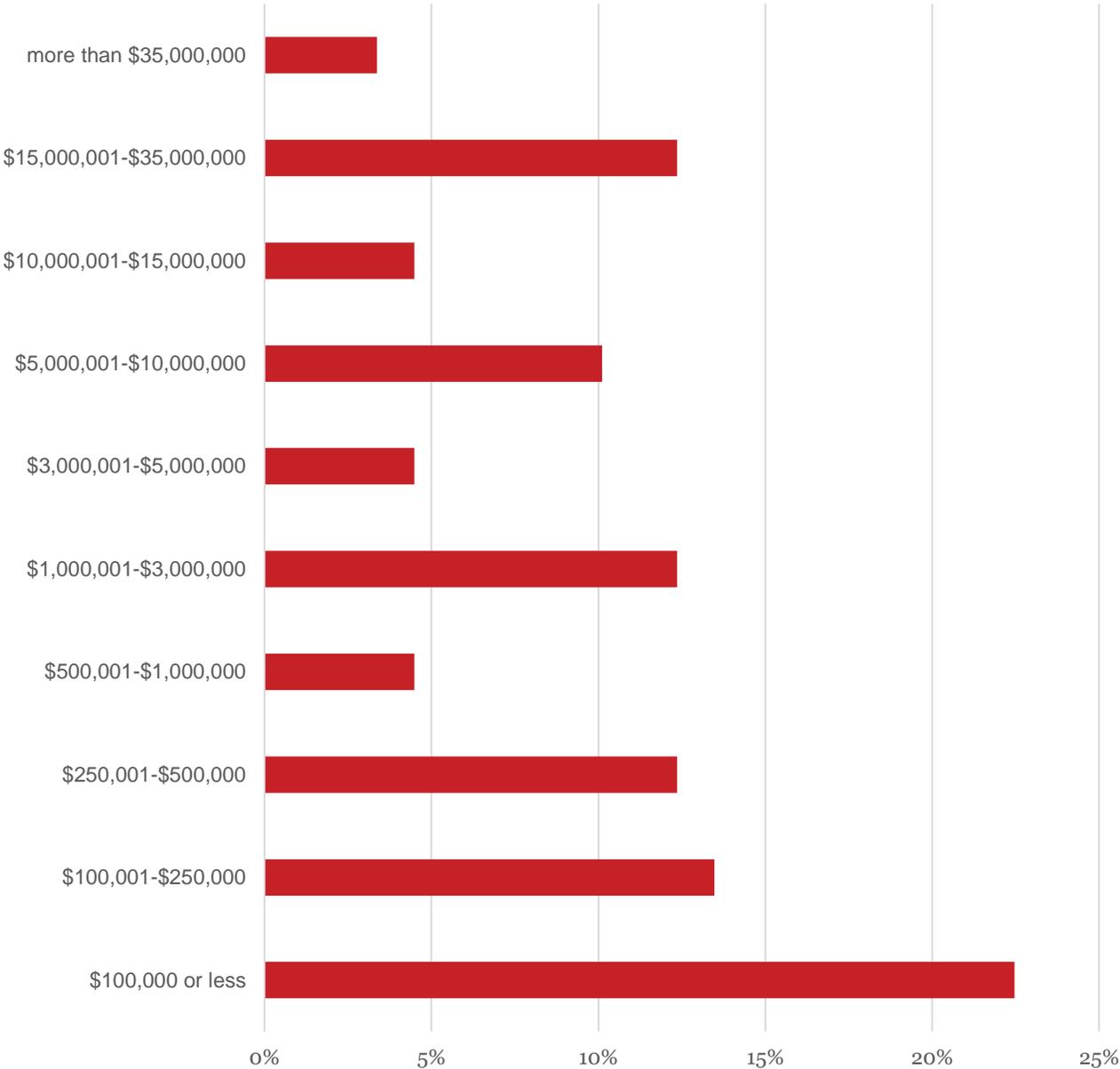
Which of the following actions are you planning in the next 12 months? (Check all that apply)



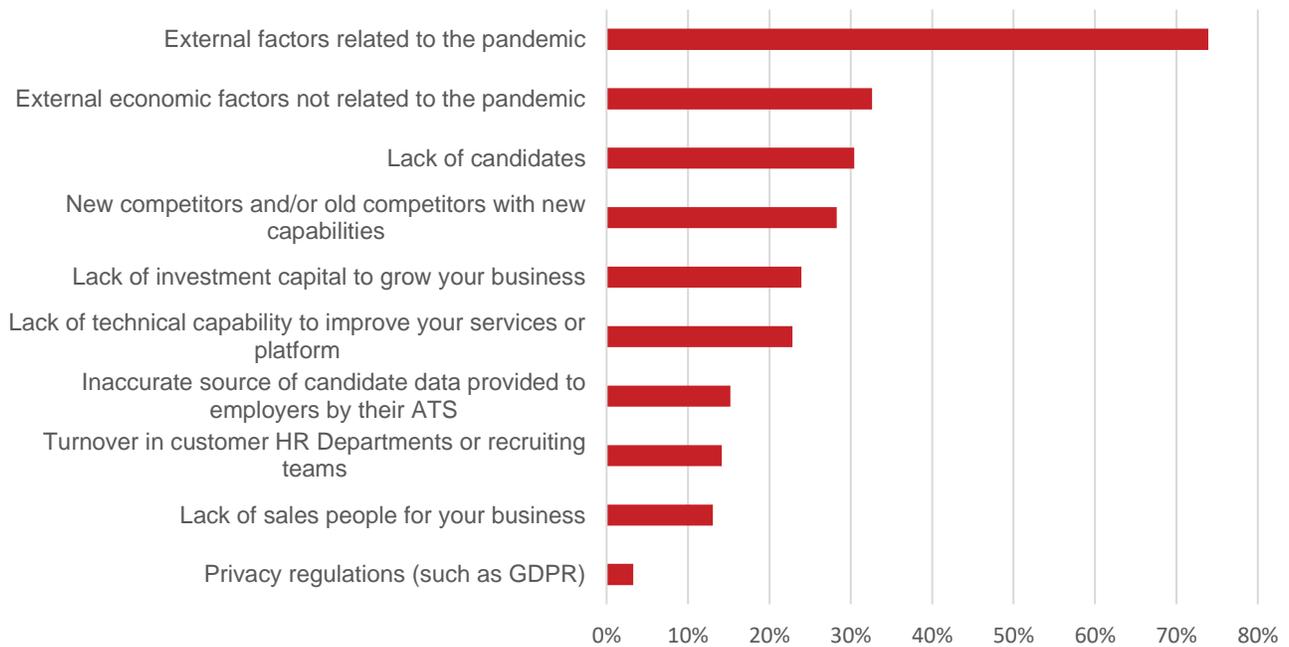
Which of the following do you see as the *single biggest* competitive threat to your business in the next 12 months



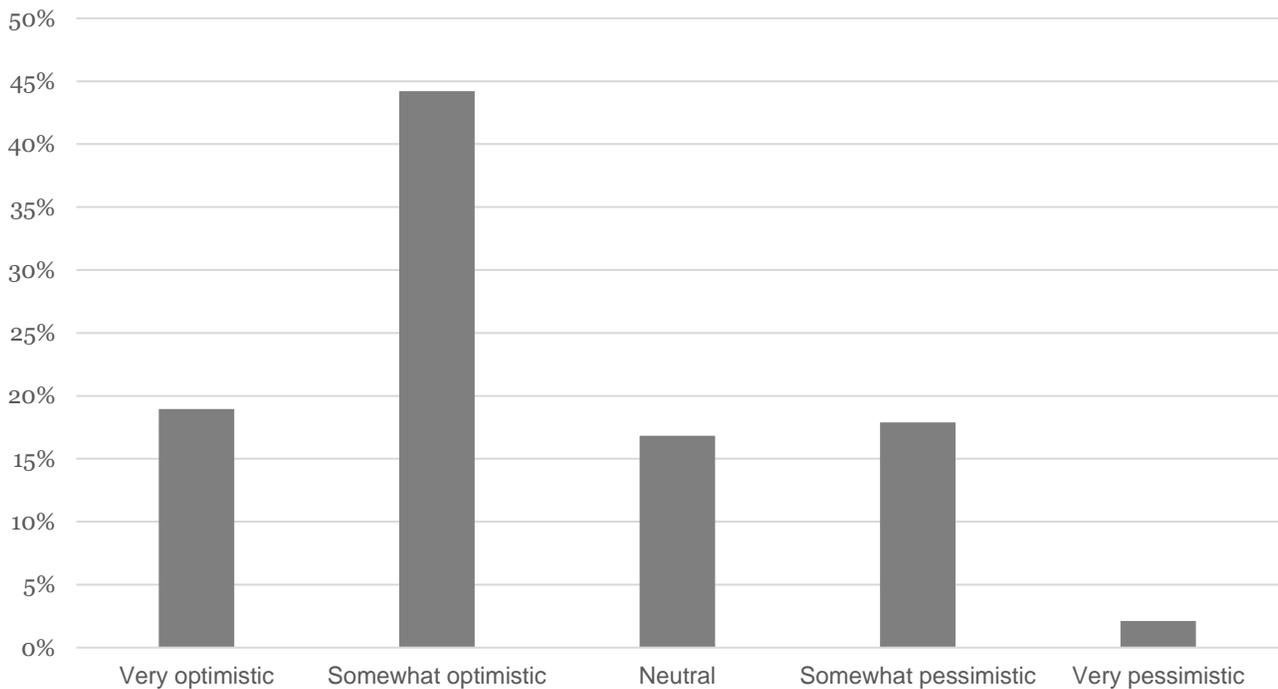
What is your best estimate of revenues for your business in the next 12 months? (in USD)



Which (if any) of the following challenges or impediments will *significantly* affect your organization during 2020-21? (check all that apply)



What are your feelings for your organization's opportunities during the next 12 months?



Comments on respondents' optimism or pessimism:

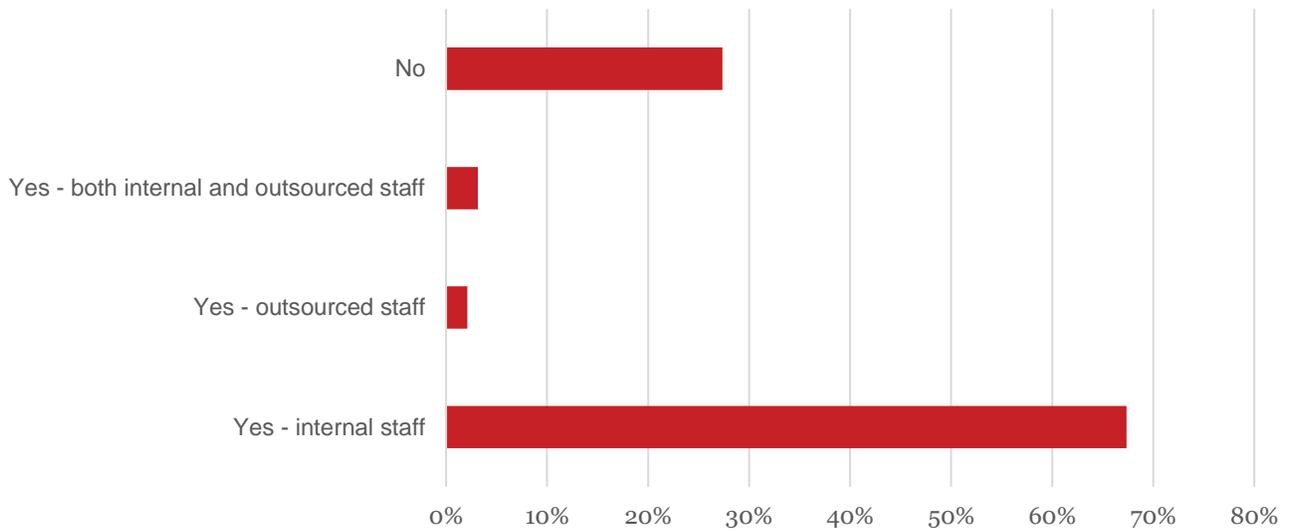
- We're seeing some signs of life coming back, but there are too many unknowns between the economy, the election and social unrest to have confidence it will sustain.
- We've been growing with our proposition 200% each year. The pandemic has a large impact on our turnover. We see it coming back now in little steps. I believe we'll keep growing and reach new customers. Also new tech is coming up that will help us grow.
- At present, I feel the pandemic has caused a great deal of uncertainty and so beyond the next 6 months are largely unknown as to the quality and size of our niche market.
- Depends on how COVID affects the industries we cover next winter, spring and summer.
- Scaling will happen if my clients receive their B rounds of funding. Clients are open-minded to hire the best from across the USA given remote work setups now. My job is easier.
- Would be very optimistic if it wasn't for the pandemic.
- With the pandemic and upcoming election, there is no way to plan for what is to come. I do believe eventually things will get better but it may be another year before things move forward.
- Huge opportunity and even a small piece of the pie is a lot of money!
- We've adapted during covid and already had a remote work force. We have a resilient team and great technology. We are growing again. With a solid team and superior technology, we are well positioned to grow and succeed by taking market share from others.

- We are a tech company and technology will drive major innovation in this space.
- Budgets are getting so tight, we are likely to not get new customers
- Media business is struggling. Many not hiring or can't afford to use a service.
- improving service and internal systems to meet client KPIs are setting us up for success.
- Our business has definitely taken a hit due to covid. However, we are still cash flow positive and, once a vaccine is found and things start returning to normal, I feel we should be in good shape moving forward.
- Business is picking up with Employers opening surgeries and elective procedures again.
- With an improved process for sourcing relevant jobs and introducing some new lower price point products for candidates, I believe we can see growth within our jobs board.
- We have focused our attention on providing high touch service and support to our current customer base as well as providing free advice and constant quality communications to our prospective base.
- More direct sales normally results in more revenue.
- I think we're prepared either way and react accordingly.
- Strong market, lots of funding

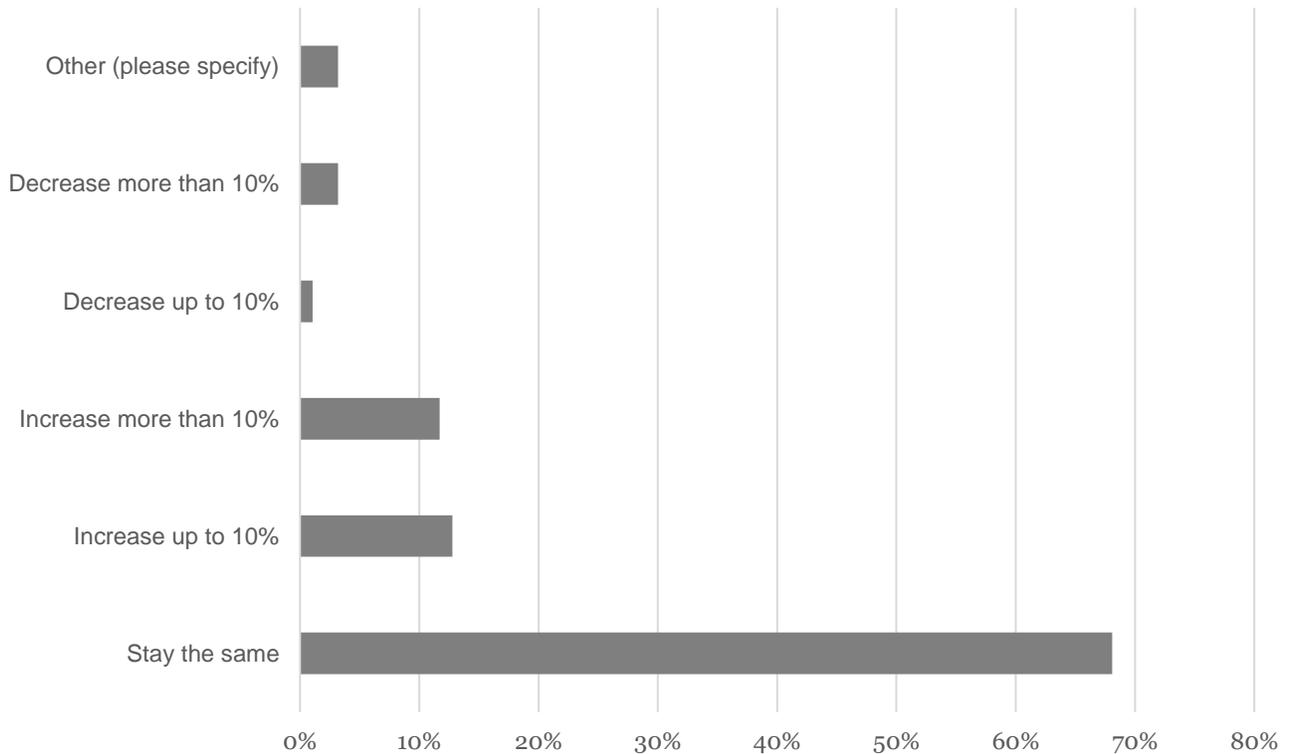
- We are relaunching a site with new features, technology, and better integration with Google Jobs
- Our niche sector will recover and so will we, but it will take longer than hoped - at least a year. On the positive side - we're still standing, so cannot complain.
- Not sure what the future holds, things were shaky already
- It seems like it will take a while until we get over the pandemic. Until then, business will be very slow.
- Downturn creates opportunities when others are struggling. Growing market share is more important than growth itself. We have a great team and strong plans for the future.
- I'm planning to enter new niche markets with new job boards
- Optimism is the only door open!
- Our business was doing great before COVID-19 - we are in better shape than ever, with growing market share and great brand recognition etc. However, COVID-19 has created uncertainty and reduced recruitment in our sector. We seem to have weathered the uncertainty fairly well so far, and are in a good position to resume our growth as the recruitment market picks up again. Against this, various external global uncertainties (eg the economic and political collapse of the USA, the growing rift between Australia and China, the continuation of destructive 'supply side' economic policies by the Australian Government etc.) throws doubt on the prospect of the market picking up again.
- New product / service offerings opening possible revenue channels & wallet share.
- My industry has been ravaged by the pandemic and jobs just aren't coming back.
- We're going through tough times, but we're adapting and these changes will make our business stronger in the long run.

- Feeling overwhelmed by the matching technologies coming online, and those already up, such as LinkedIn (which suggests jobs when I log in) and Google's job-openings-in-your-area listings. Still happy about holding our own by publishing superior content for our industry niche, but the professional recruiters don't know about us because they're not in the industry niche -- they know about Indeed, LinkedIn, etc., but not about trade publications/sites such as ours.
- We have a unique offering that is experiencing high uptake and excellent candidate engagement and conversion to application.
- we're unique in that we have some other big projects coming in the next 12 months around employer branding, partnerships, our technology, etc. If I were just a job board I'd be very worried, but because of the others things we have going on I'm optimistic
- The great unknown for 2021. we have funds to get thru to end of 2021 without any sales but where's the fun in that!!
- Rebounding to pre-Covid levels of demand . . hope to be able to sustain into 2021
- New developments and additional options will enhance the position of the job board and increase revenue.
- The Construction Industry remains as a pillar for recovery, unlike the property bust and recession of 2008. Investment and availability of candidates remain a challenge
- Business is already back close to pre-COVID levels and there is a lot of optimism among customers.
- Investment is needed
- We're seeing significantly increased hiring by large employers and those are our primary customers.

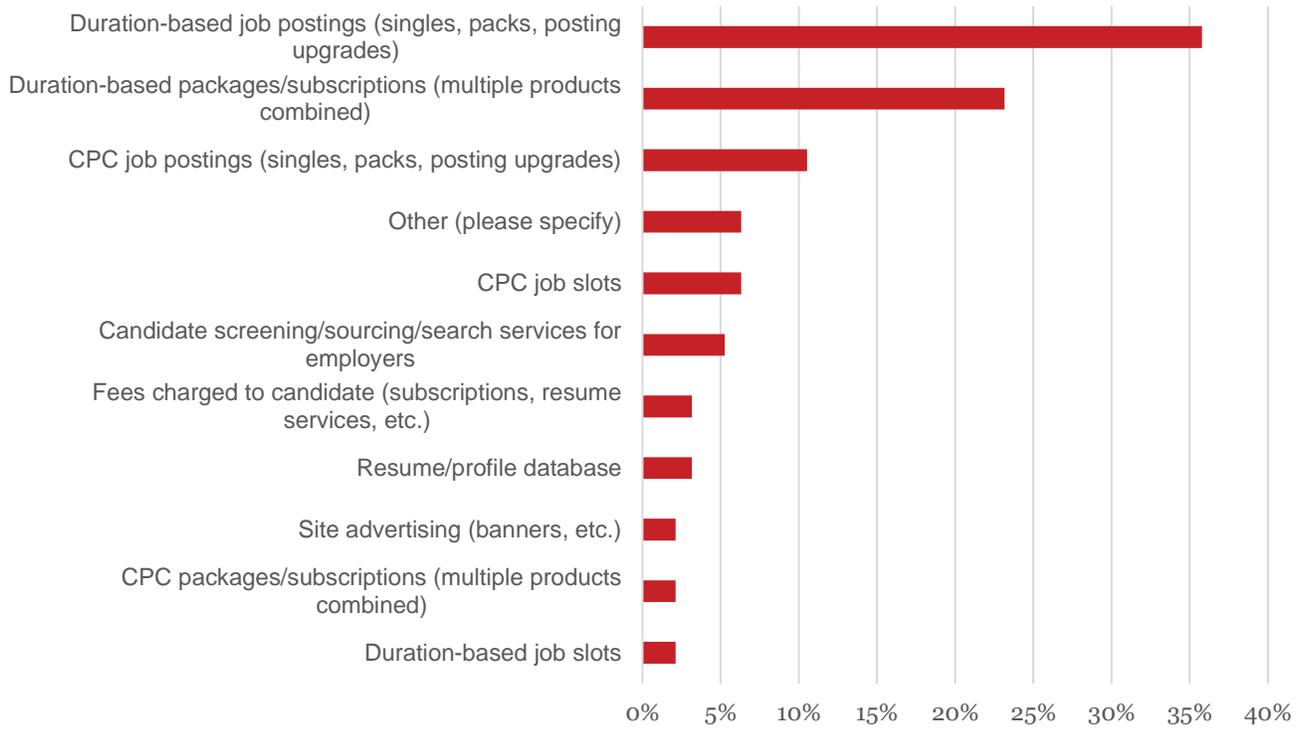
Does your organization have a dedicated sales staff?



For the coming 12 months, which of the following best describes your overall rate structure for your products and services?



Which of the following has been your ***largest*** source of revenue in the past 12 months?





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
- Mergers and acquisitions
- Product development and launch
- Site branding & positioning
- Marketing & sales
- Business valuation
- 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 550+ 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 the AIM Group

The AIM Group, which supported survey distribution and distribution of this report, is the world's leading business intelligence service for marketplaces: recruitment, horizontal, automotive and real estate. It publishes AIM Group Marketplaces Report, about global marketplaces; publishes an [annual Recruitment Advertising and Marketing report](#), and offers a [free weekly digest](#) of business intelligence on marketplaces. It also operates the annual [RecBuzz conference](#), now scheduled for fall 2021. (The Job Board Doctor has spoken at several RecBuzz conferences.) Learn more at AIMGroup.com.