



Global Recruiting Site Trends Survey Results

2021-22

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 181 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 30 questions, and required approximately 12 minutes to complete.

The survey included questions covering:

- Perceived threats and opportunities
- Effects of the COVID pandemic
- Demographics
- Largest sources of revenue
- Business models
- 2021-22 business plans

Survey responses were collected in September 2021. 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 2021-2022 survey:

- The industry has bounced back from the economic effect of the COVID 19 pandemic: 74% have seen **revenue increases**, including 43% whose revenues rose 20% or more.
- **Lack of candidates** is the most significant threat to future business for respondents
- **Duration-based job postings** (single posts, packages, or subscriptions) are the top revenue producers for 68% of the respondents; **pay for performance** services (CPC, CPA) are the top revenue producers for 24% of the respondents
- **Job alerts** continue to produce the highest quality traffic for 55% of the respondents
- 17% of respondents now offer **pay-per-application** services to their clients, a drop from 2020
- The **ongoing effects of the COVID 19 pandemic** as respondents' most significant threat in the coming 12-24 months
- Only 2% of respondents **feel pessimistic** about their opportunities for the coming year
- The term '**job board**' continues to be the most common term that respondents use in describing their business

Key respondent quotes:

- The lack of applications are forcing companies to change their recruiting models and this is the opportunity to help them in all areas (digital, social and recruitment advertising models)

- I wish it was 20 years ago.

- I think in Europe CPC-performance-marketing is finally posing a serious threat to post & pray boards.

- The market has lost its way. We traffic in redundant traffic claim numbers of candidates we don't have. Employers don't trust the 1,2,3 players deliver great candidates and that skepticism is passed down to niche players.

- Even more M&A activity as failing businesses are consolidated into succeeding businesses and, sometimes, failing businesses will merge with another failing business simply to generate a somewhat new failing business.

- Automation and integration will be key

- Hopefully pure CPC aggregators die. They are a waste of space and ruin the industry and provide no value

- *COVID has been a huge challenge in the industries that we focus on.*

- *The talent shortage coupled with the number of people who are willing to move to a new job (about 30%, say some surveys) may mean a bit more popcorn popping in the pan.*

- *We've plenty of funds to make sure we can ride the programmatic and AI wave.*

- *Things are not as bad even with COVID Delta Variant effects. Things will get better as more people get vaccinated.*

- *After a steep drop in 2020, we're now on track this year to exceed our record revenue in 2019*

- *Data-driven performance recruiting is coming for those post & pray budgets ;)*

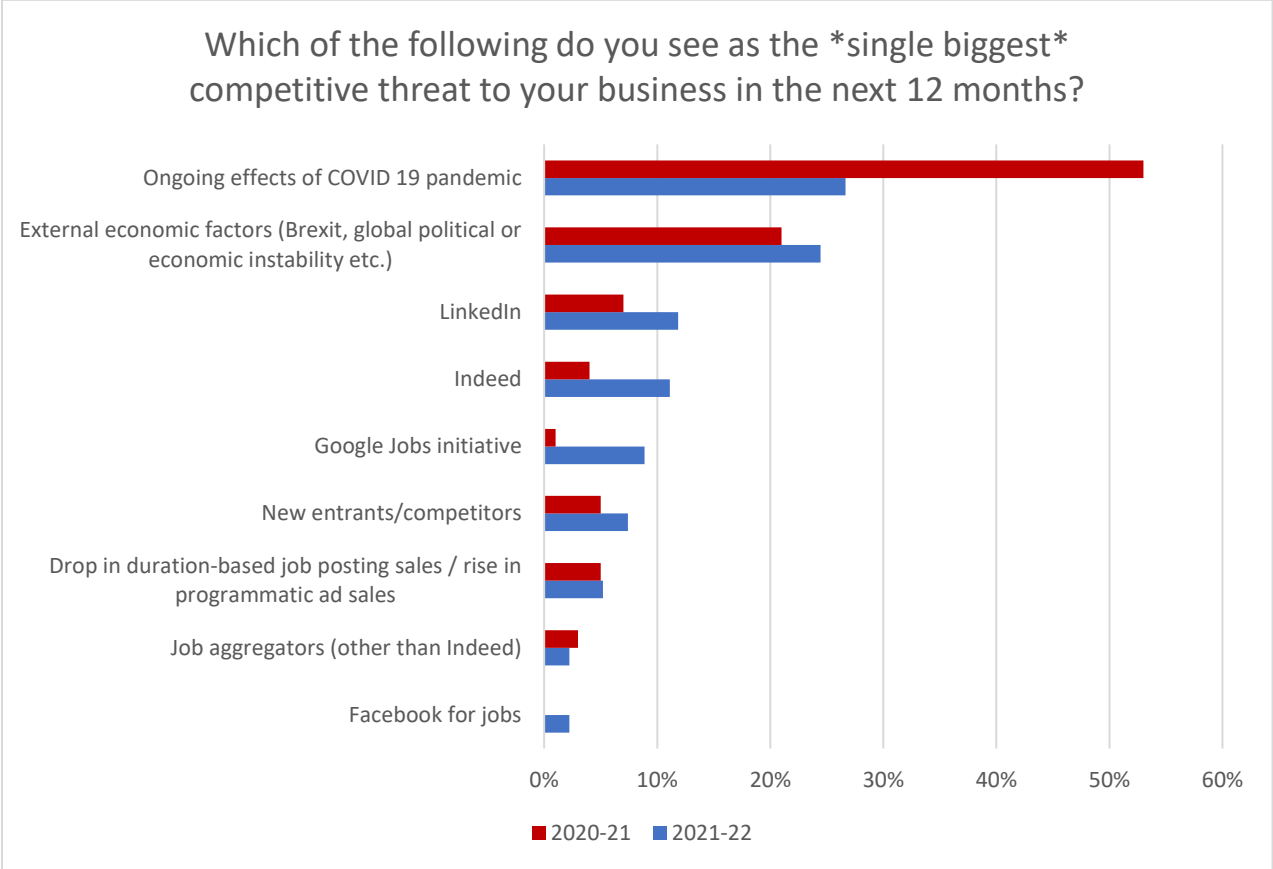
- *Because if you don't evolve change will happen to you. We are not sitting around.*

- *Our revenues have been reaching new record highs every month since April*

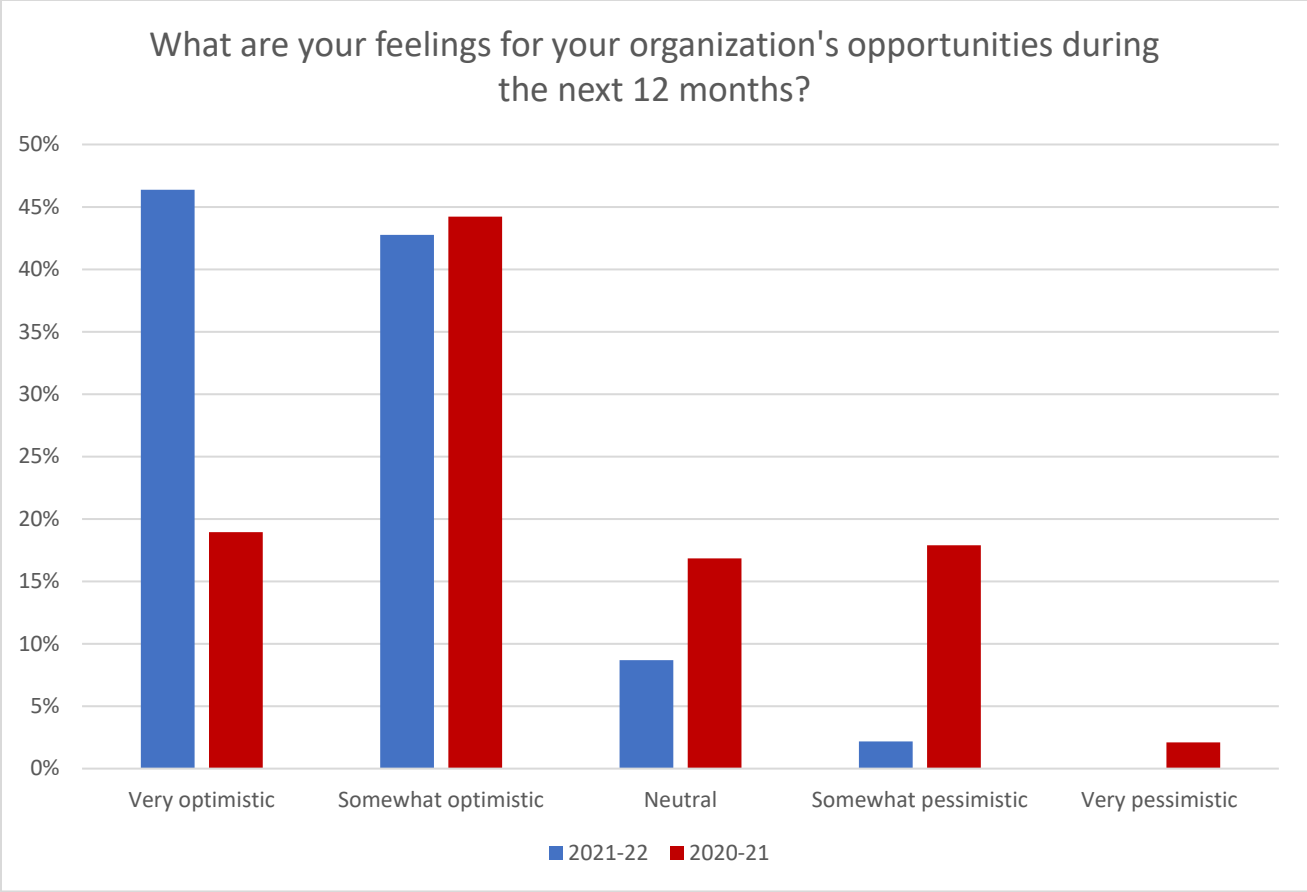
- *Having the best year ever*

Comparing 2021-22 Survey to 2020-21 Survey results:

The effect of the COVID 19 pandemic has been felt in survey responses, but concern has diminished in this year's survey:

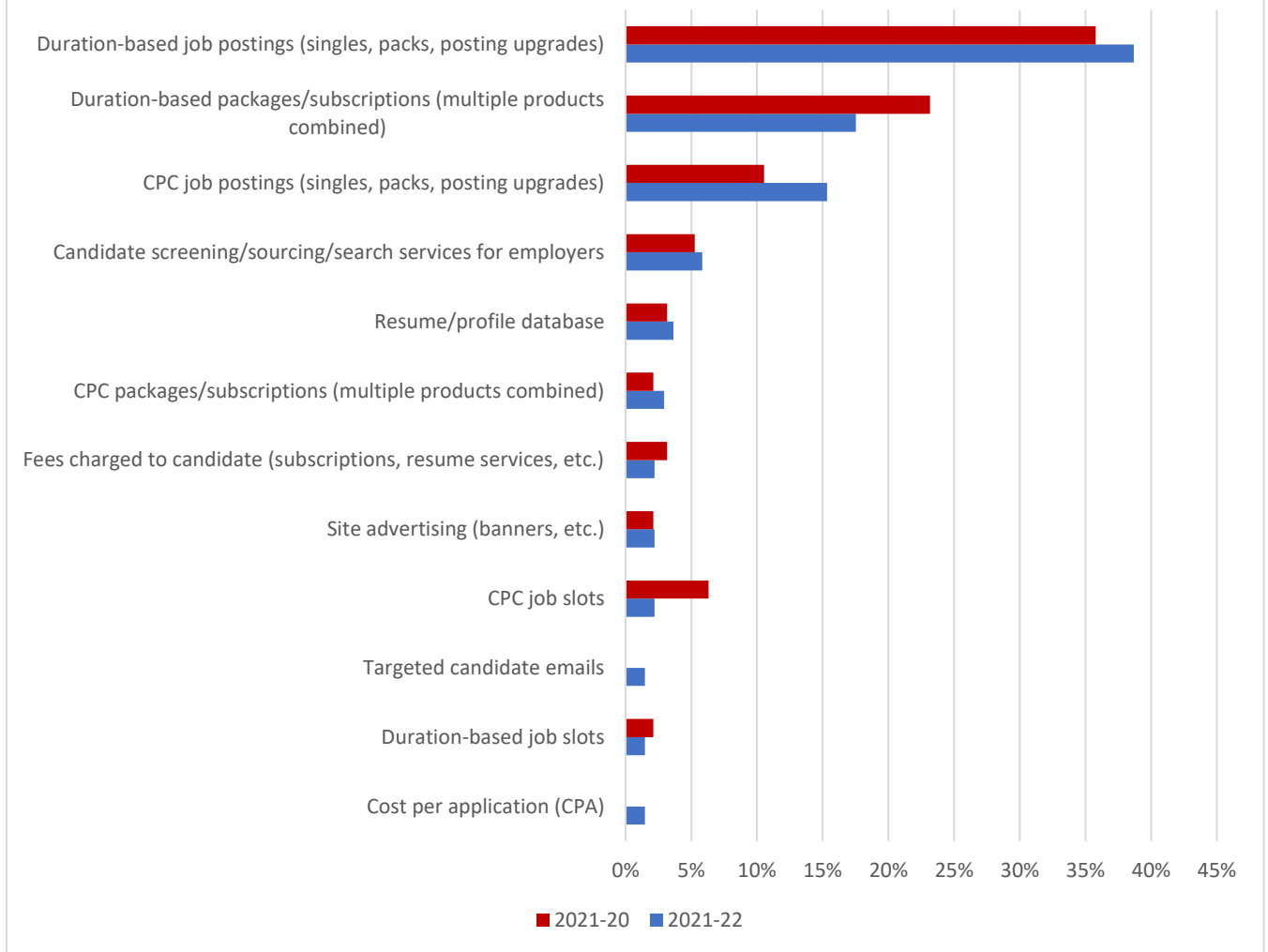


Note the increase in concern about LinkedIn and Indeed. Contrast that to the *lack* of concern (0%) this year for Facebook!



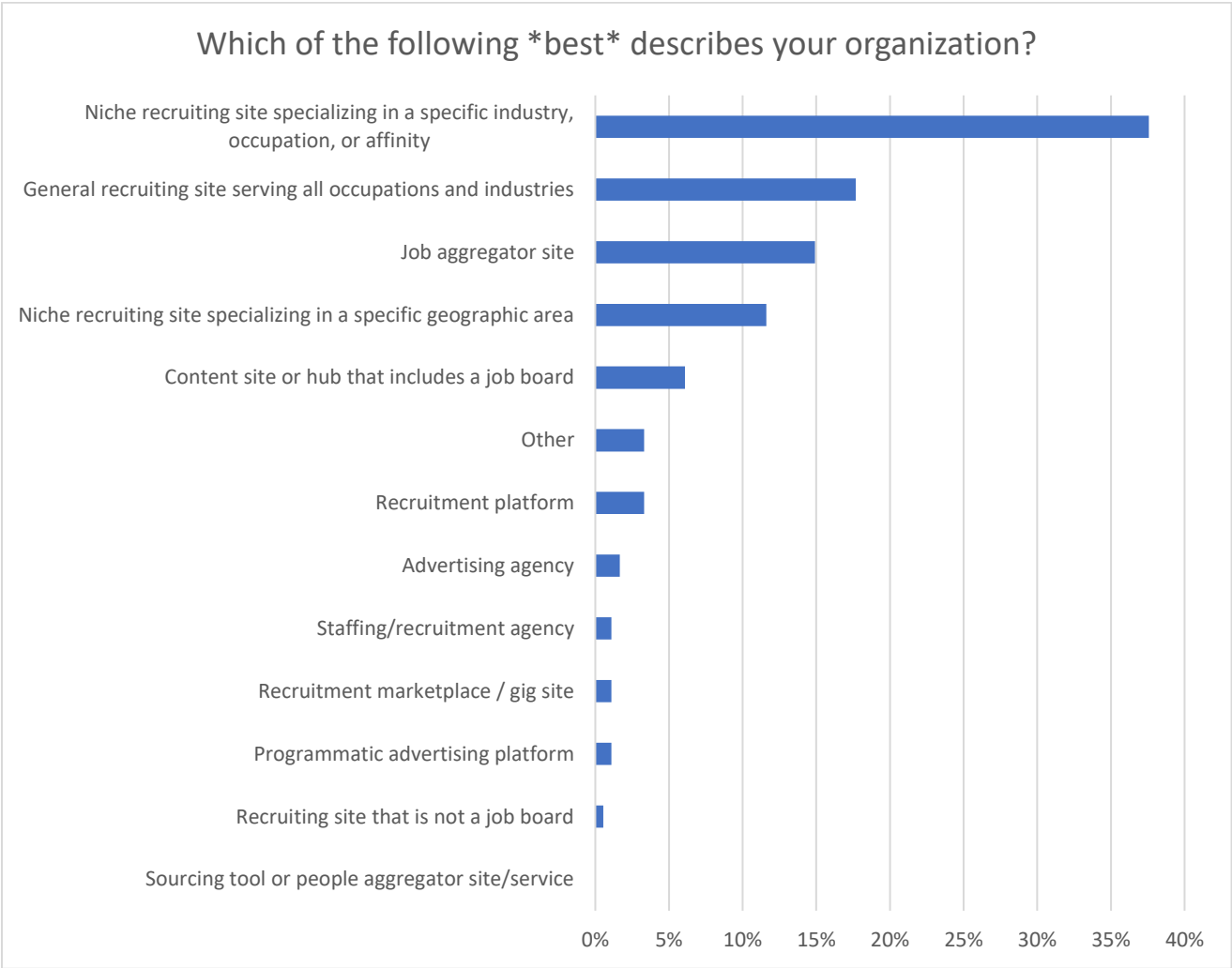
There has been a dramatic increase in optimism from respondents, centered in 'very optimistic. It's also surprising to see that *not one* respondent said they were very pessimistic this year.

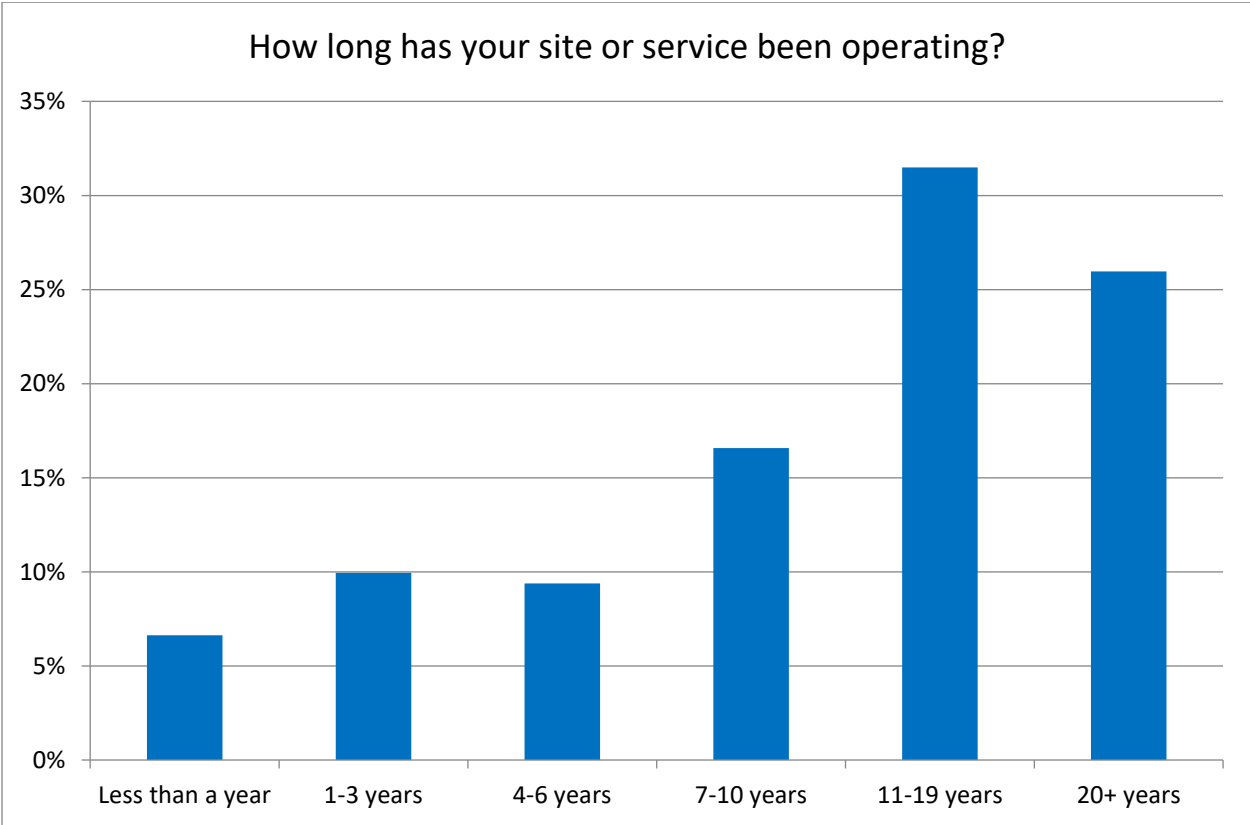
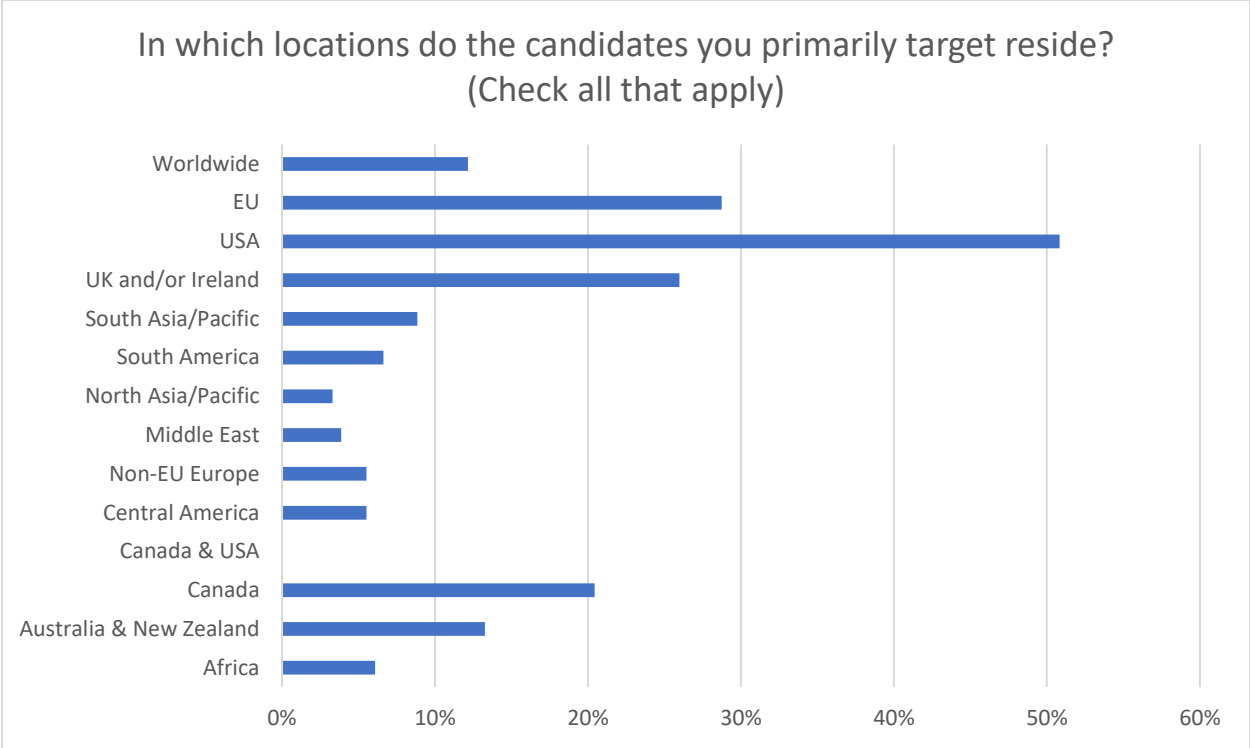
Which of the following has been your *largest* source of revenue in the past 12 months?



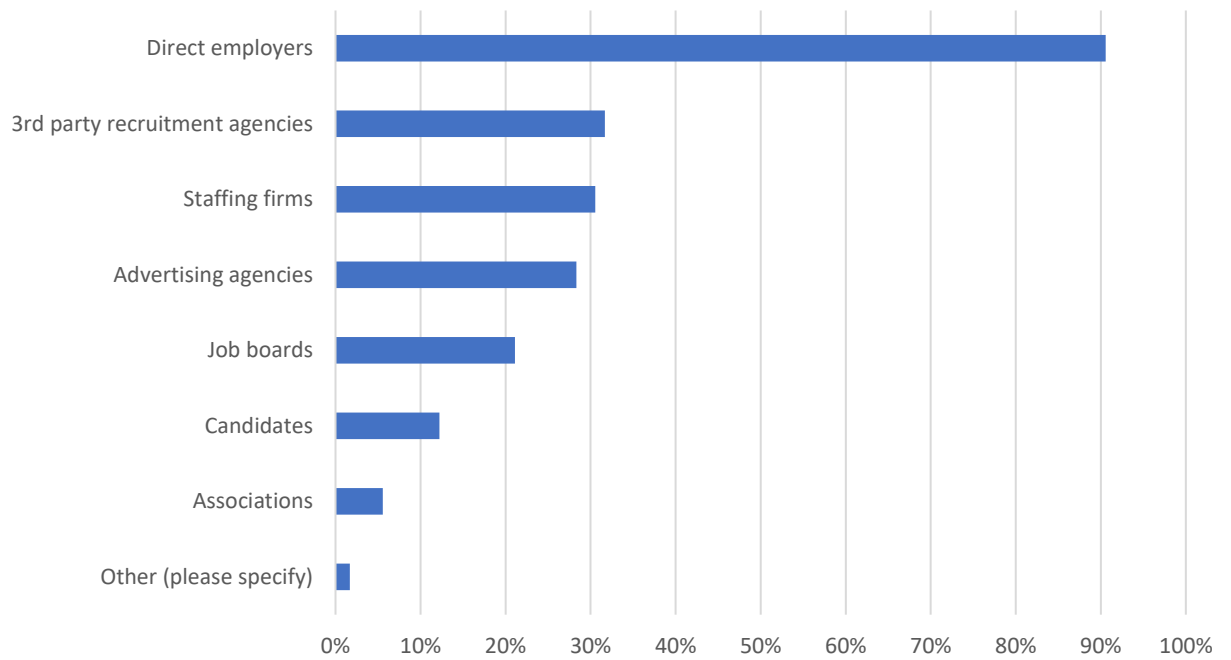
Note the increase in CPC job postings and packages. Duration-based postings and packages continue to drive the most revenue for respondents, however. For the first time this year, respondents were also asked about CPA and targeted candidate emails.

The Complete 2020-2021 Survey Results:

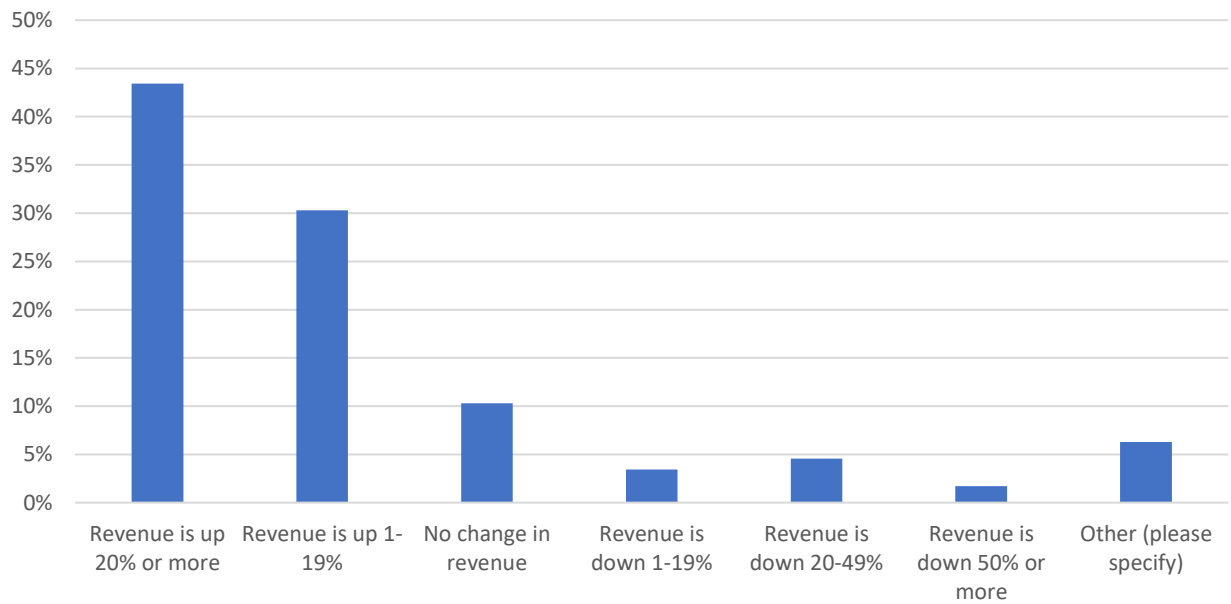




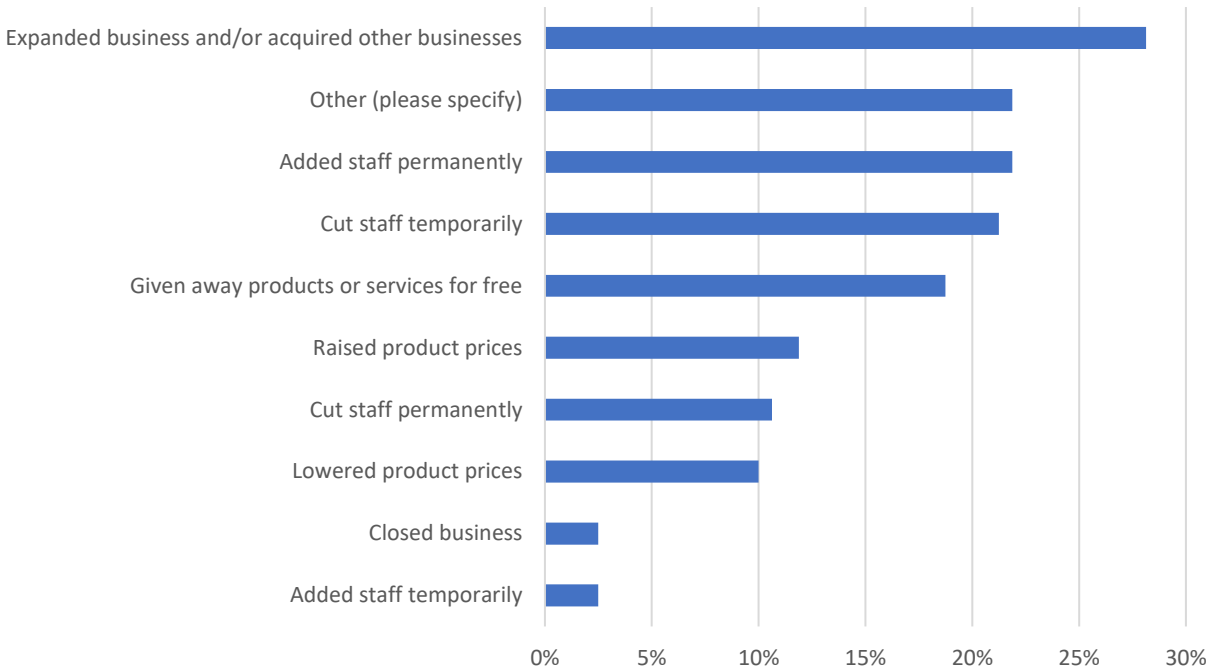
Which of the following types of clients do your business
primarily target for generating revenue? (Check all that apply)



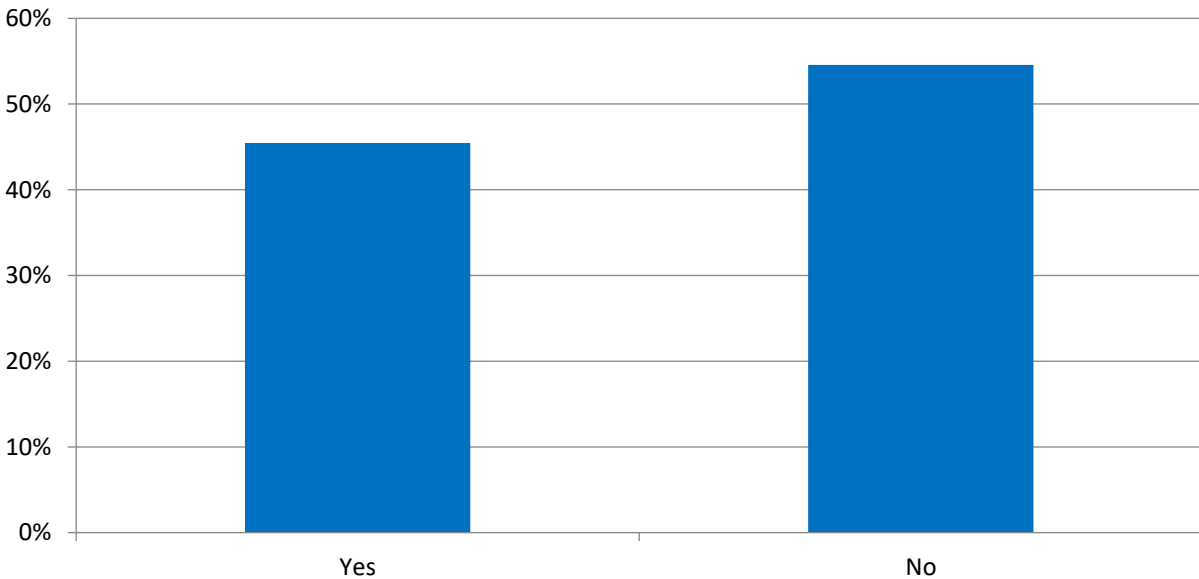
The COVID 19 pandemic has had both negative and positive effects on the recruiting industry. Compared to the same period in 2020, how has your annual revenue changed in 2021?



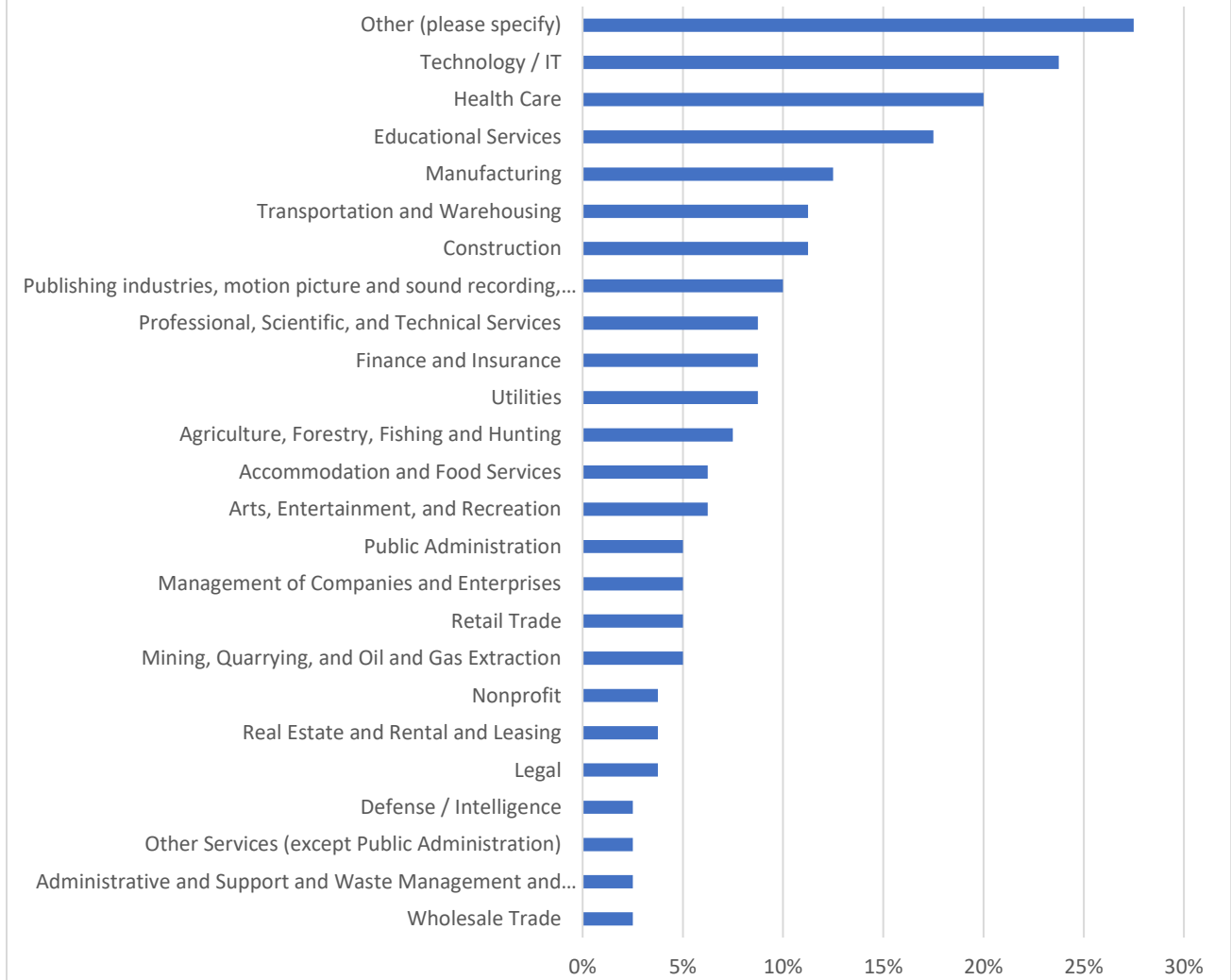
What were the primary effects of the COVID 19 pandemic on your business during the *past 12 months*? (Check all that apply)



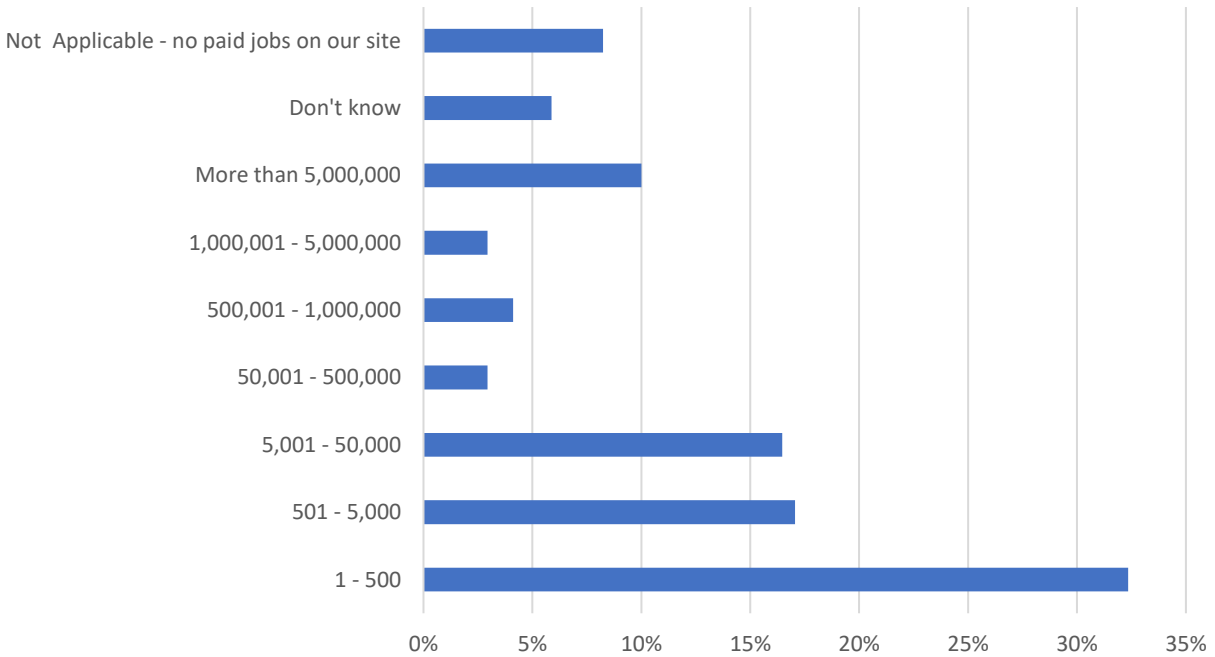
Does your business target a particular industry or sector?



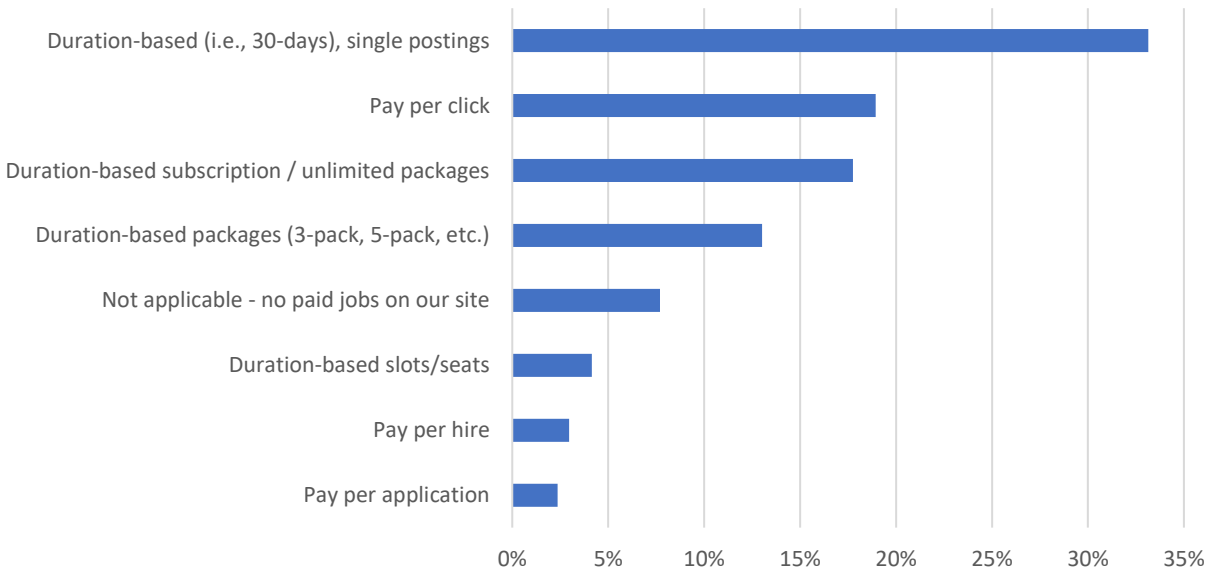
Which industry or sector does your business target?



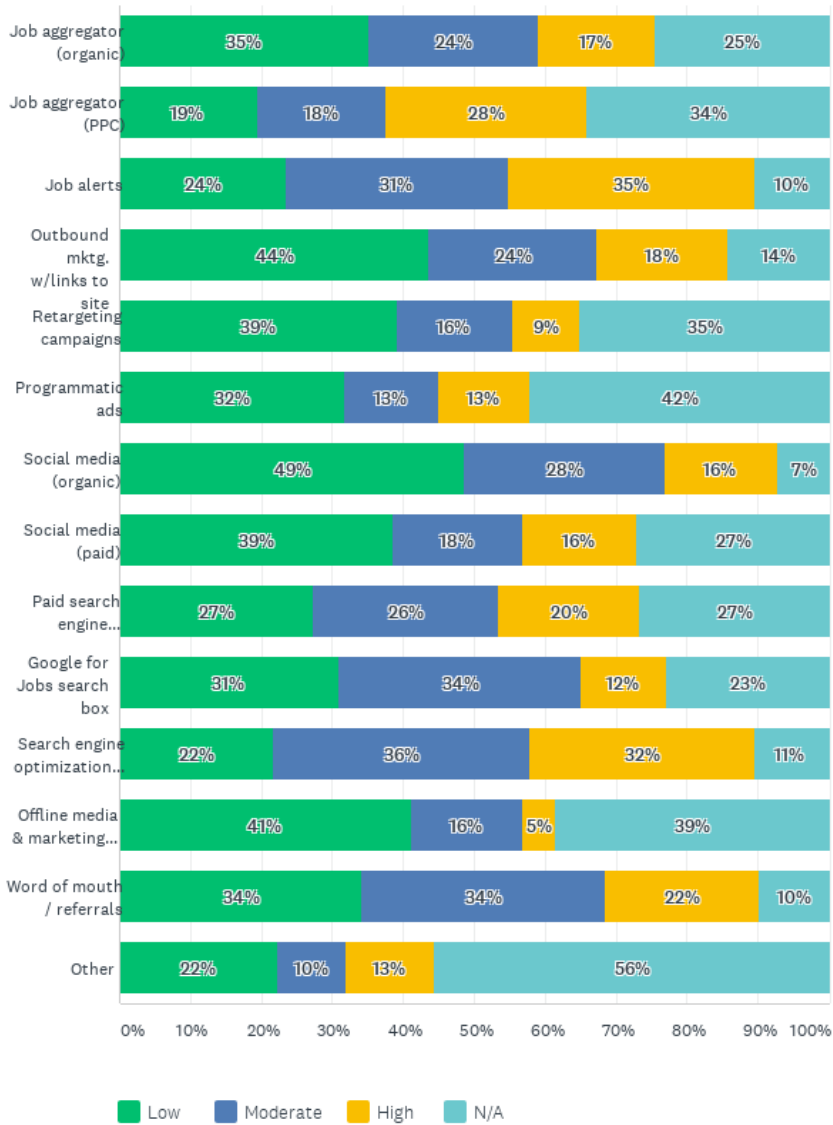
On average, how many new ***paid*** jobs (pay per post, pay for performance, or both) are posted on your site or service each month?



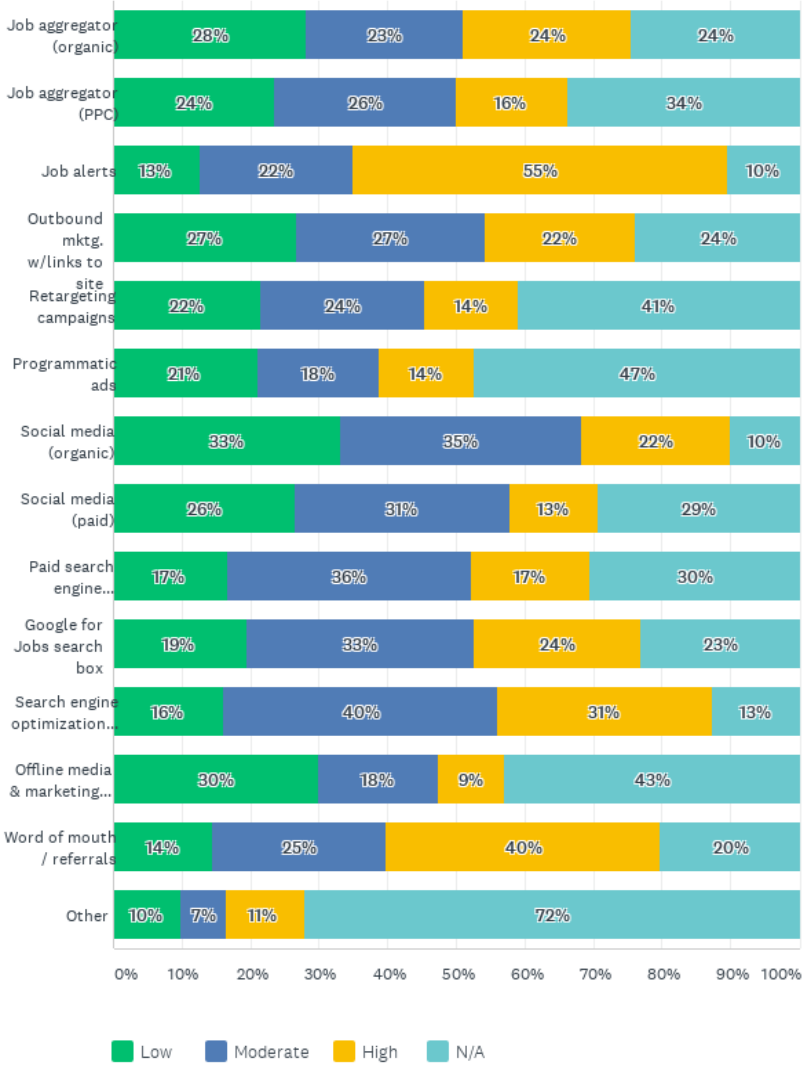
Regarding your ***paid*** jobs, what type of job posting does the ***majority*** (most revenue generated during past 12 months) represent?



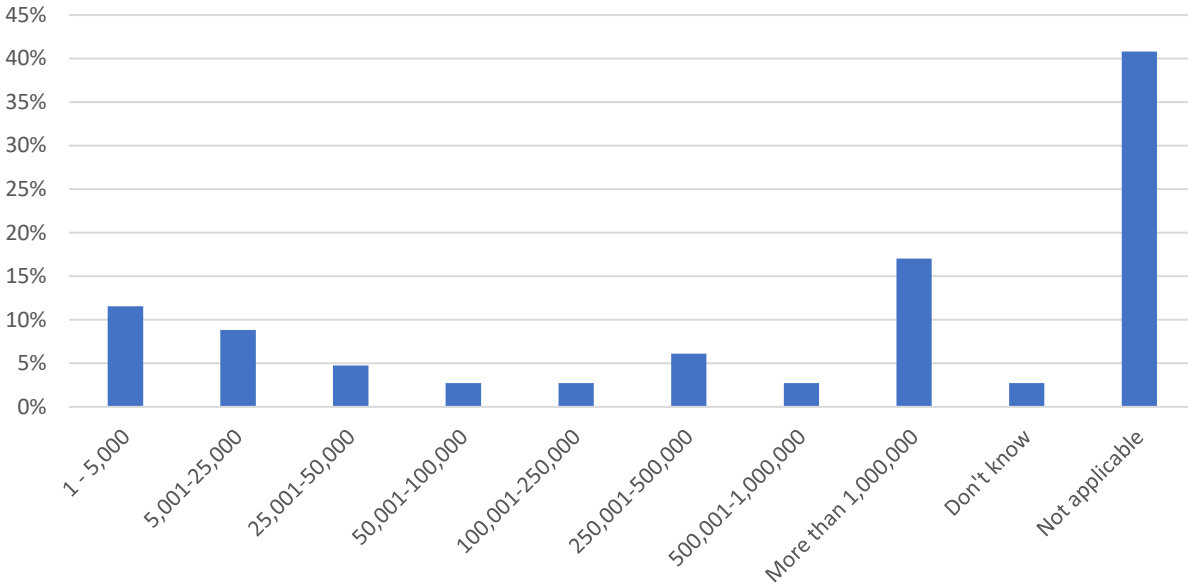
How would you rate the following sources of traffic to your site, based on the *volume* of traffic generated?



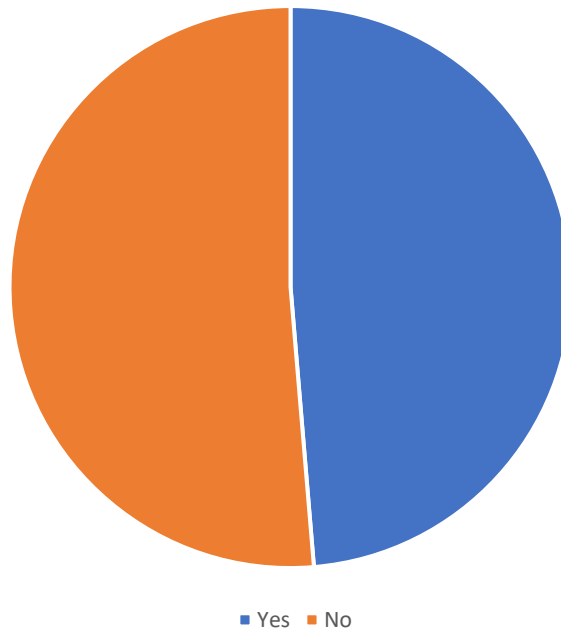
How would you rate the following sources of traffic to your site, based on the *quality* of traffic generated?



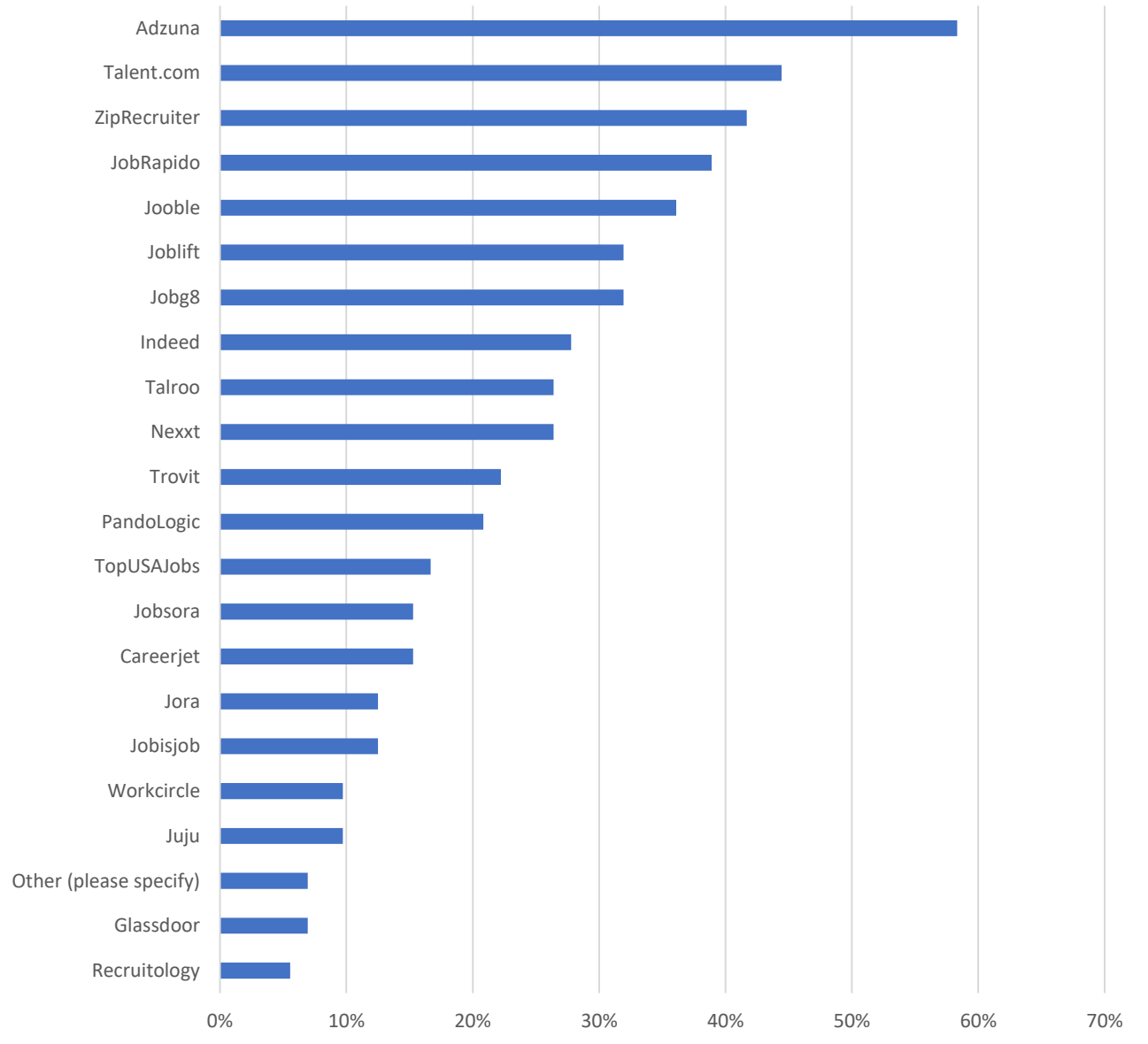
If your service offers a resume or candidate profile database that is accessible by employers, how many resumes or profiles are currently stored in the database?



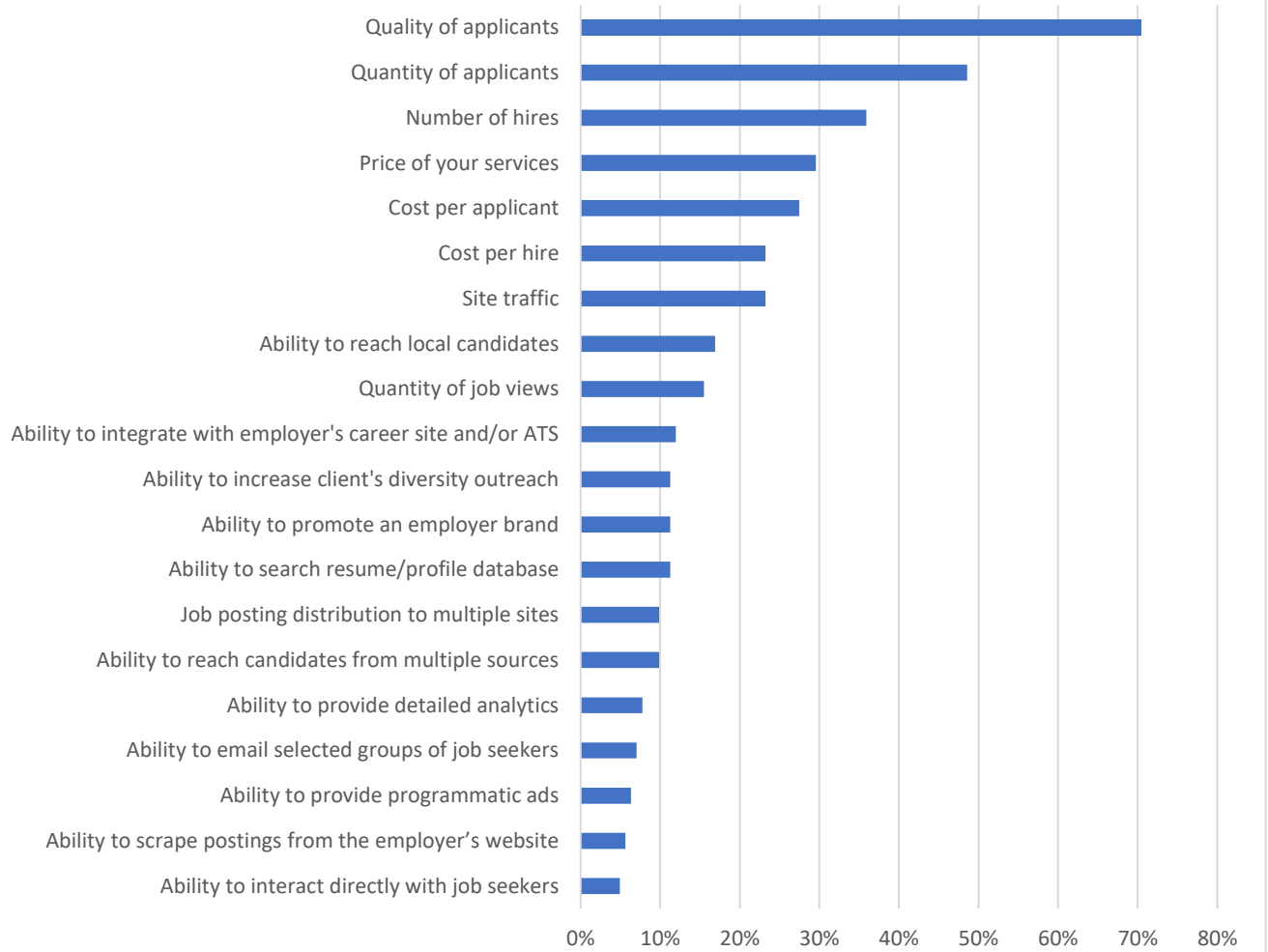
Do you currently use an aggregator to buy or sell traffic?



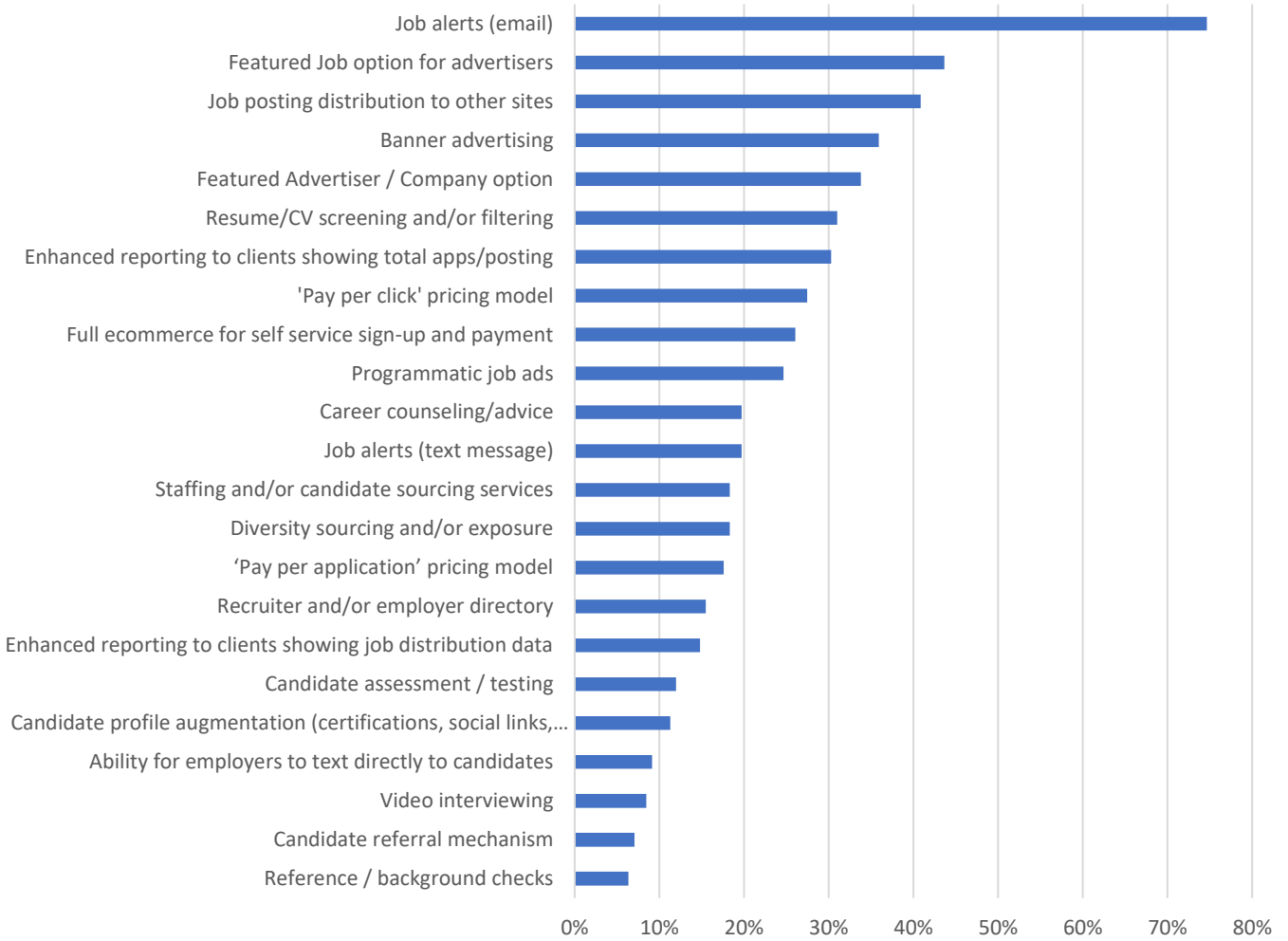
Which of the following aggregators do you use? (Check all that apply)



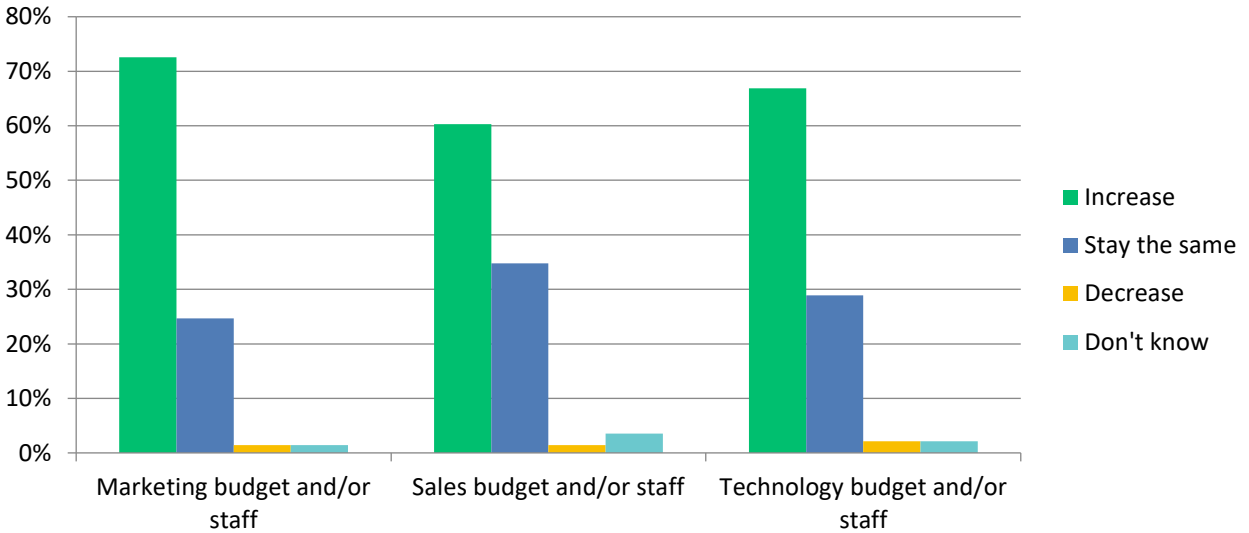
In general, which of the following criteria are ***most important*** to your clients with regard to using or renewing your recruiting services? (Select the top 3)



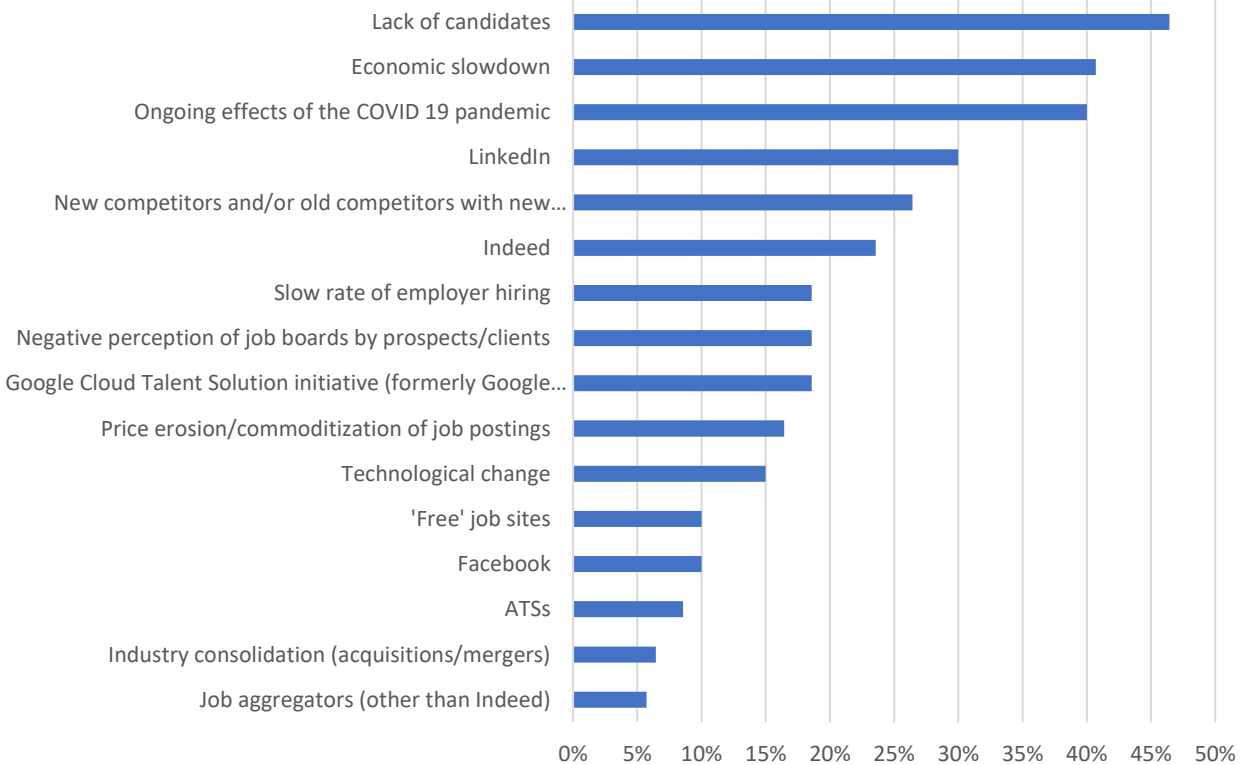
Which of the following services do you currently offer to your clients and candidates? (Check all that apply)



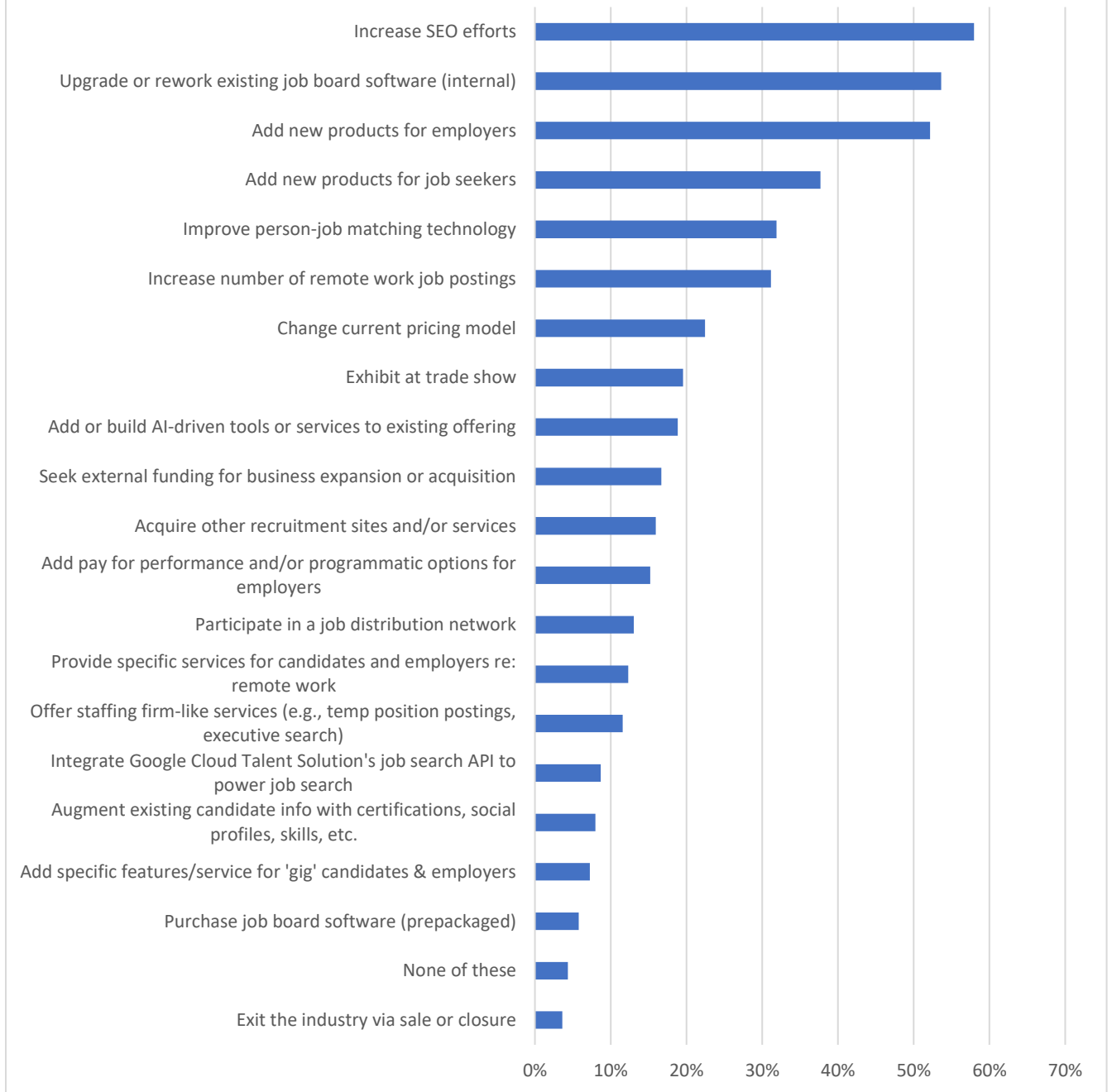
Over the next 12 months, how do you predict the following elements of your business will change?



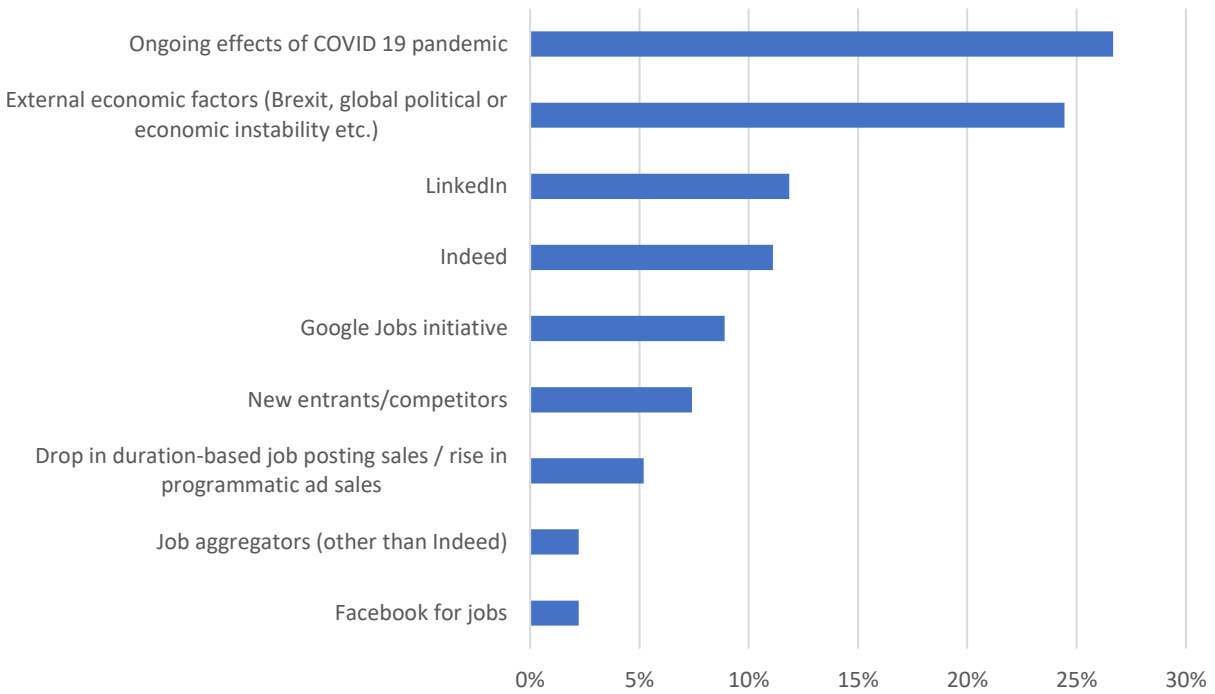
Which of the following do you see as the most significant *threats* to your business in the next 12 to 24 months? (Check all that apply)



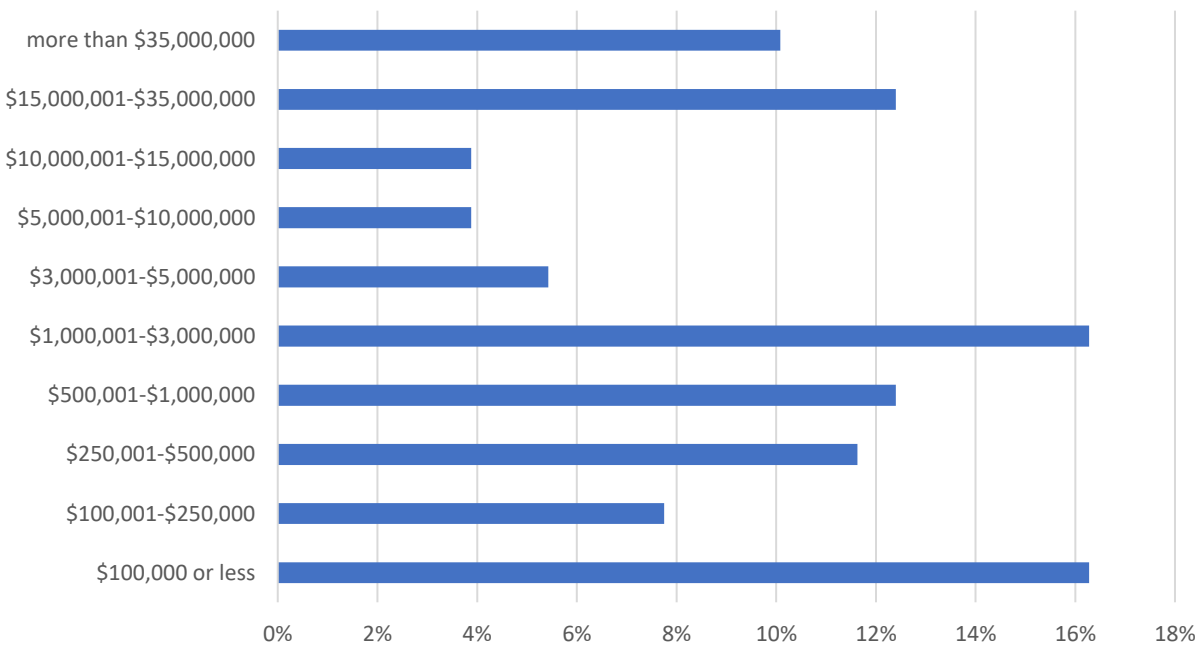
Which of the following actions are you planning in the next 12 months? (Check all that apply)



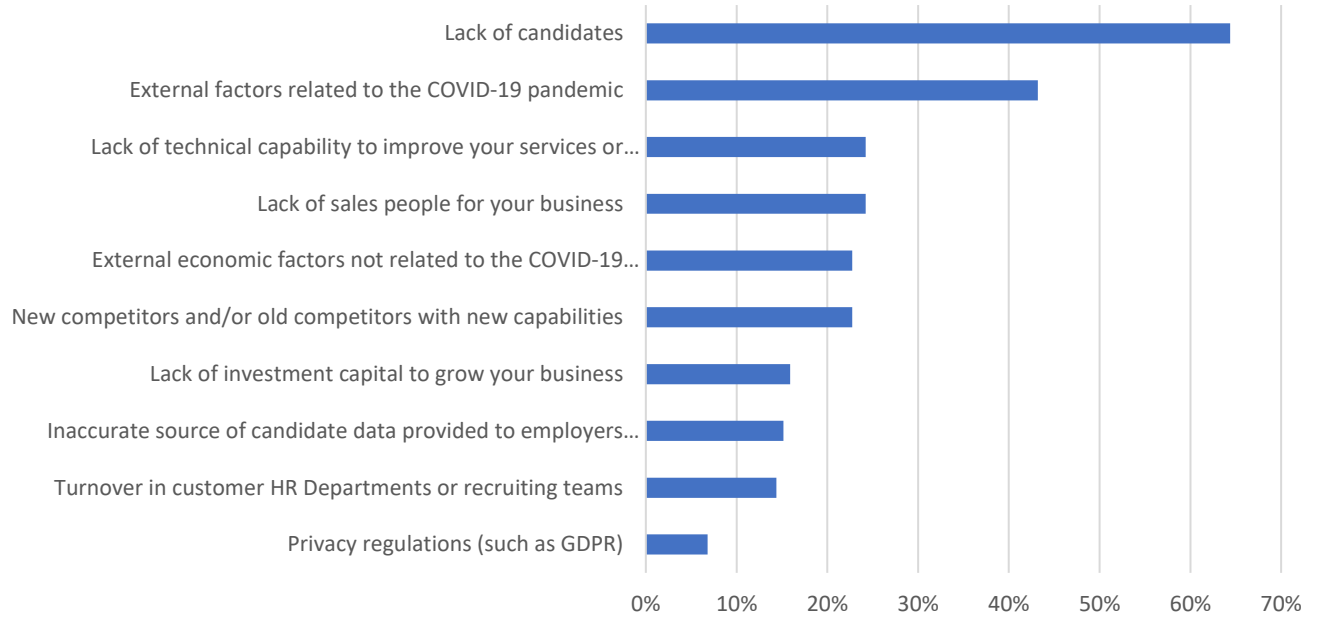
Which of the following do you see as the **single biggest** competitive threat to your business in the next 12 months?



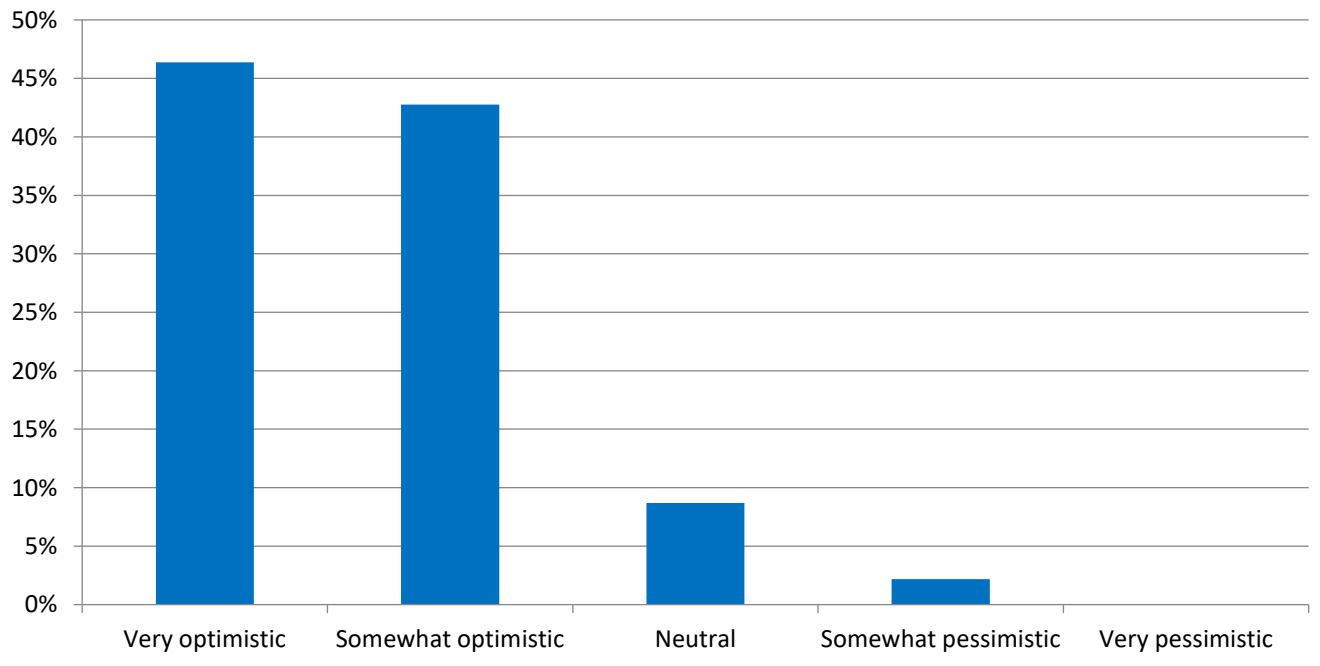
What is your best estimate of revenues for your business in the next 12 months? (in USD)

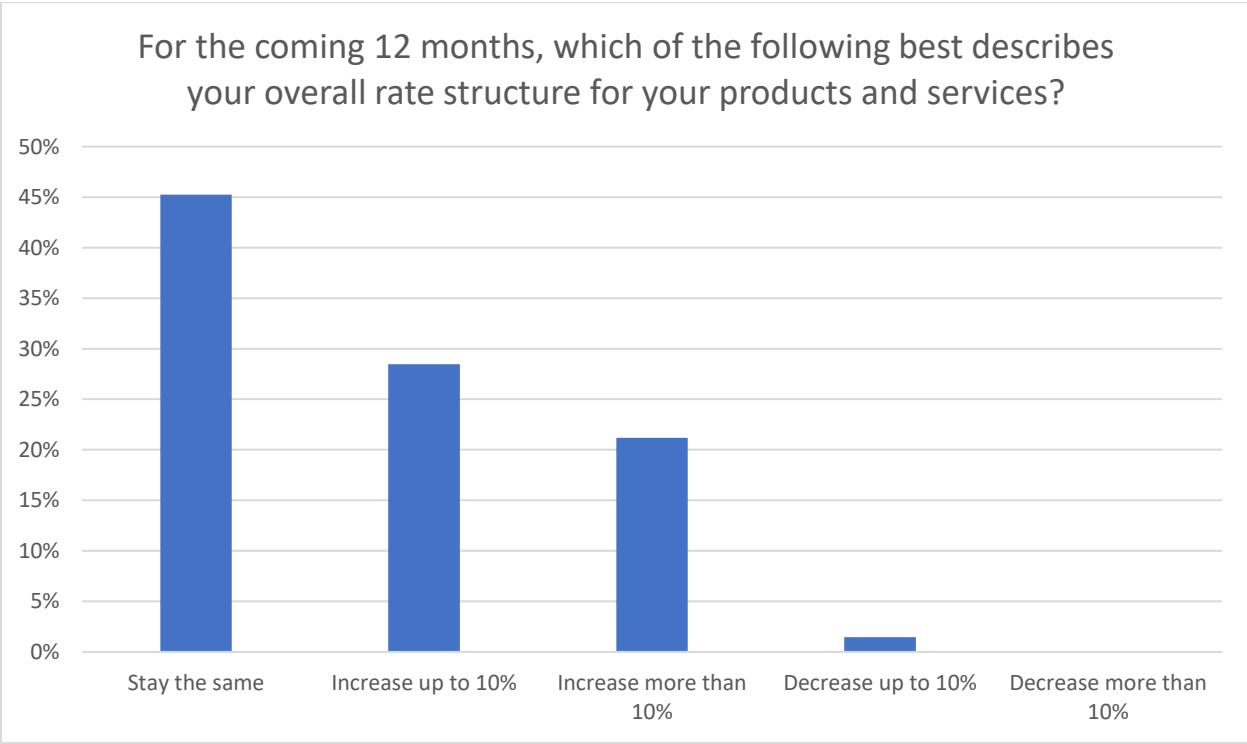


Which (if any) of the following challenges or impediments will ***significantly*** affect your organization during 2021-22? (check all that apply)

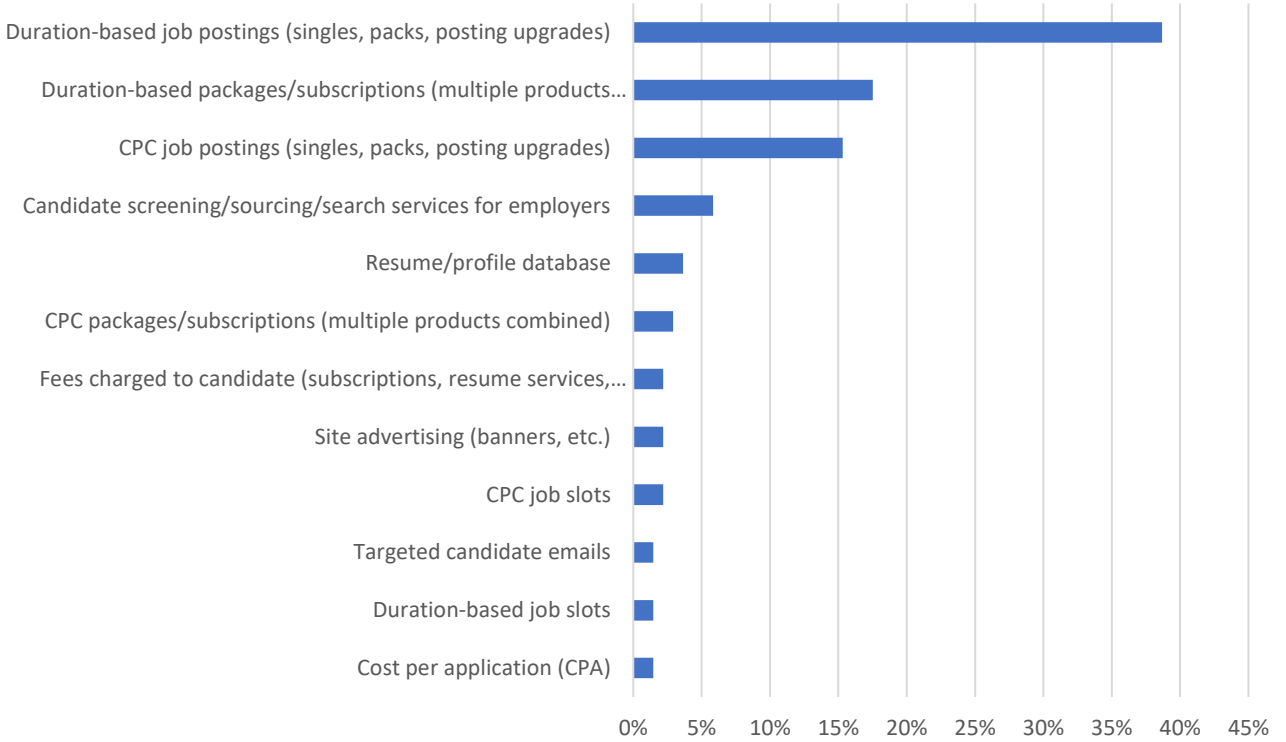


What are your feelings for your organization's opportunities during the next 12 months?





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](#). (The Job Board Doctor has spoken at several RecBuzz conferences.) Learn more at AIMGroup.com.