

2014 Aggregator Usage Survey Results

September 2014



Executive Summary

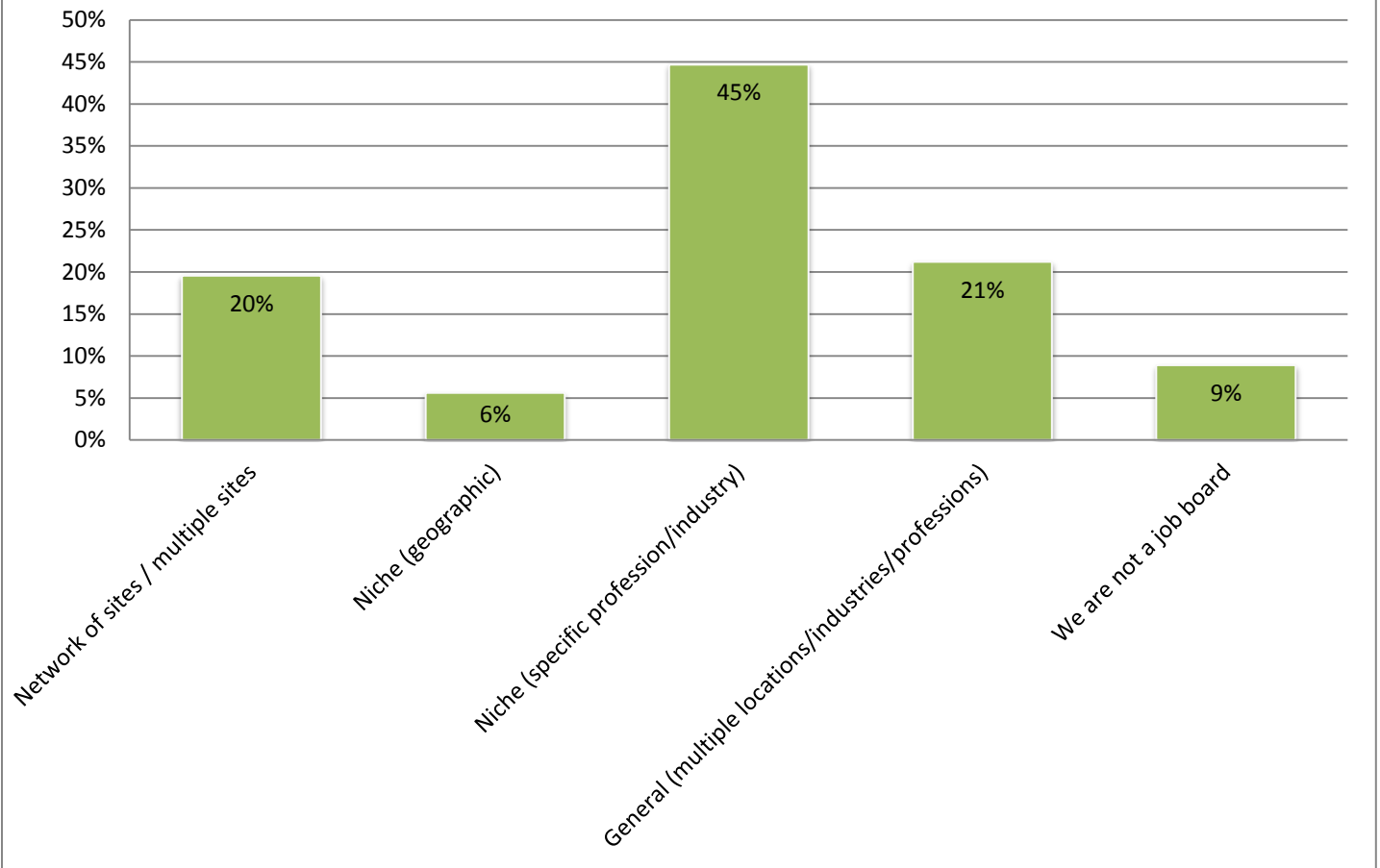
The 2014 Aggregator Usage survey is the **first analysis** specifically focused on how job boards and online recruiting sites actually use aggregators. As aggregators have become more widespread over the past decade, job boards have both played a role in their growth – and become more reliant on aggregator traffic. This survey is designed to provide insight as to **how** job boards use them, **which ones** are used, and **which specific features** are most popular.

Survey data was provided by **179 respondents** from around the globe. All types of job boards were represented, including niche sites, networks, and general sites. Here are some highlights:

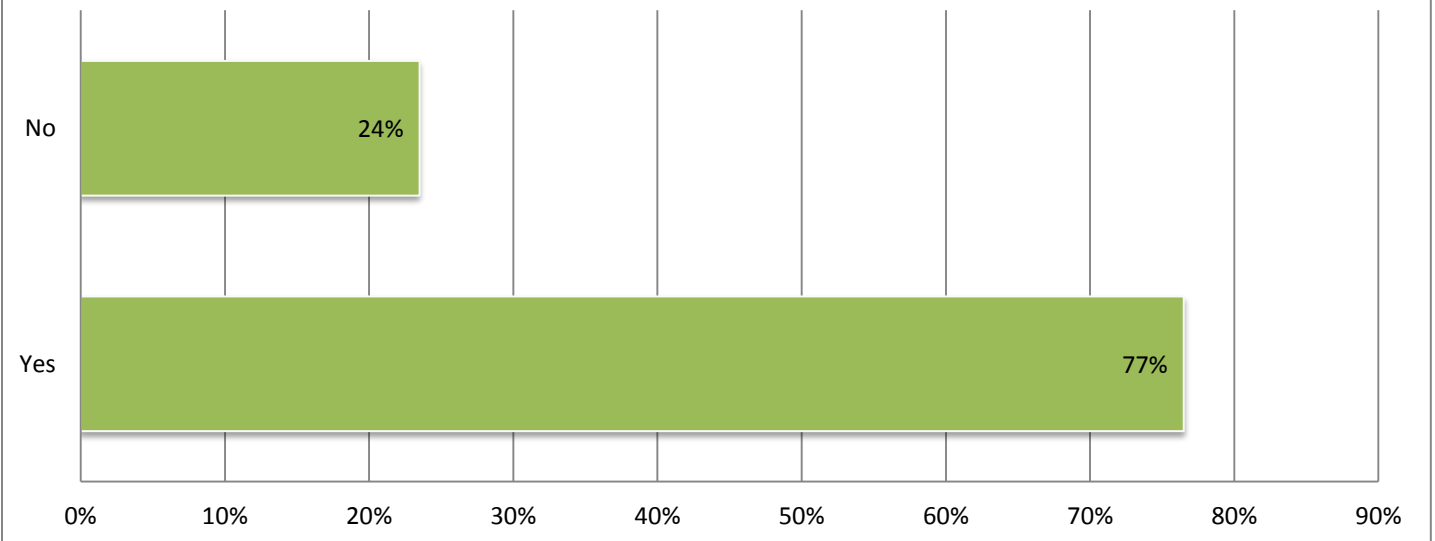
- 30% of respondents generate \$5 million or more in revenue each year
- Indeed, SimplyHired, Juju, and ZipRecruiter are the most widely used aggregators
- One-quarter of network sites are spending \$250,000 or more on aggregators; 35% of general sites are doing the same
- Despite concerns about aggregators, most respondents are planning on increasing their usage of aggregators during the coming year

Note: Comments from respondents are sprinkled through the report. They are representative of over 100 comments submitted.

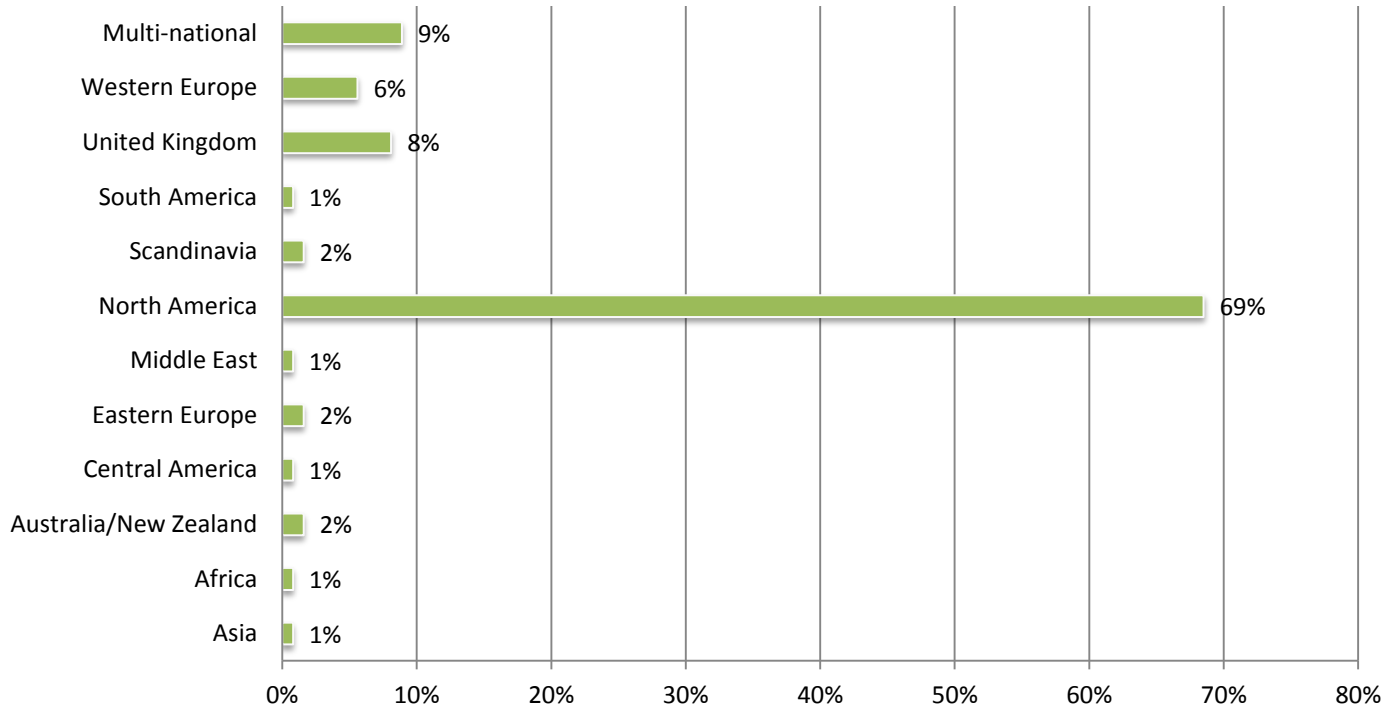
Please select the type of job board below that best describes your business:



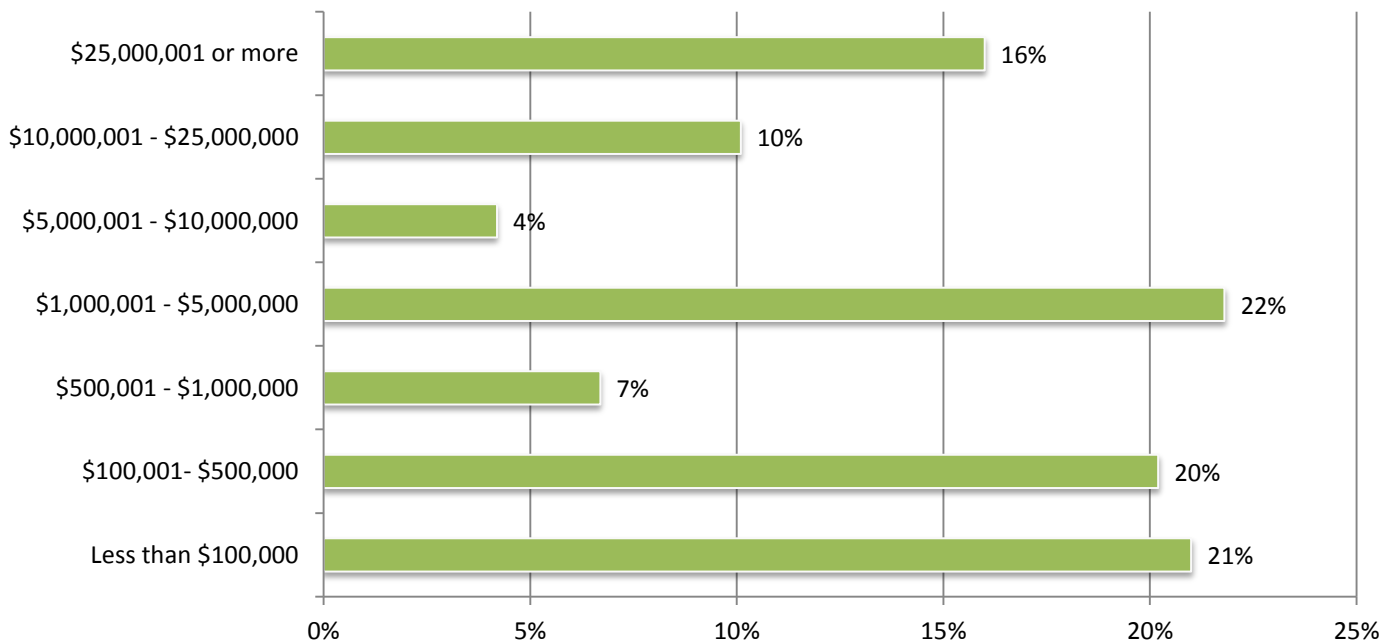
Do you use aggregator services of any kind (PPC, job backfill, etc.), paid or unpaid?



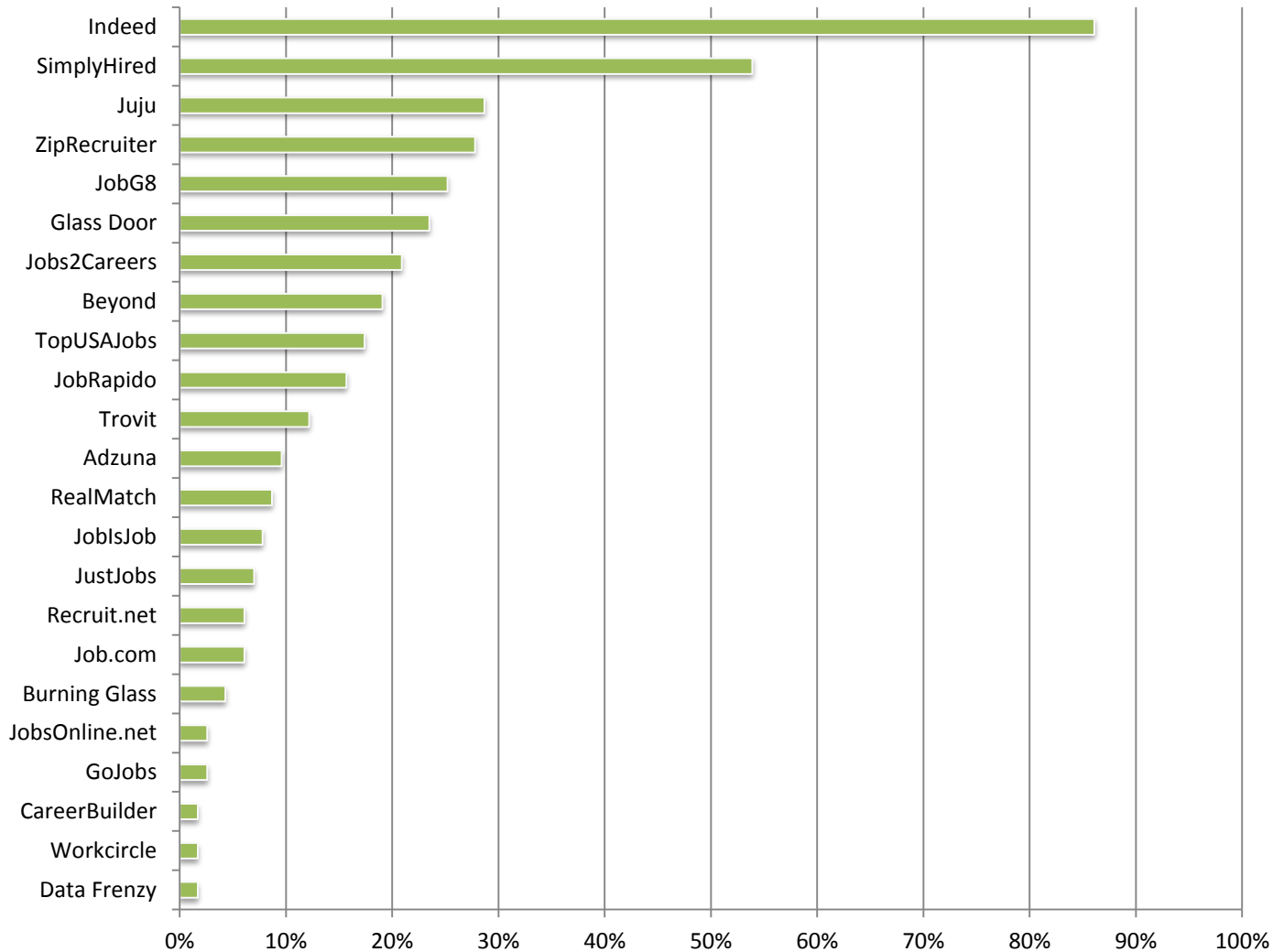
Where is the **primary** location of your business?



What is the approximate **annual revenue** for your job board business, based on the past 12 months? (in US Dollars) All types of boards



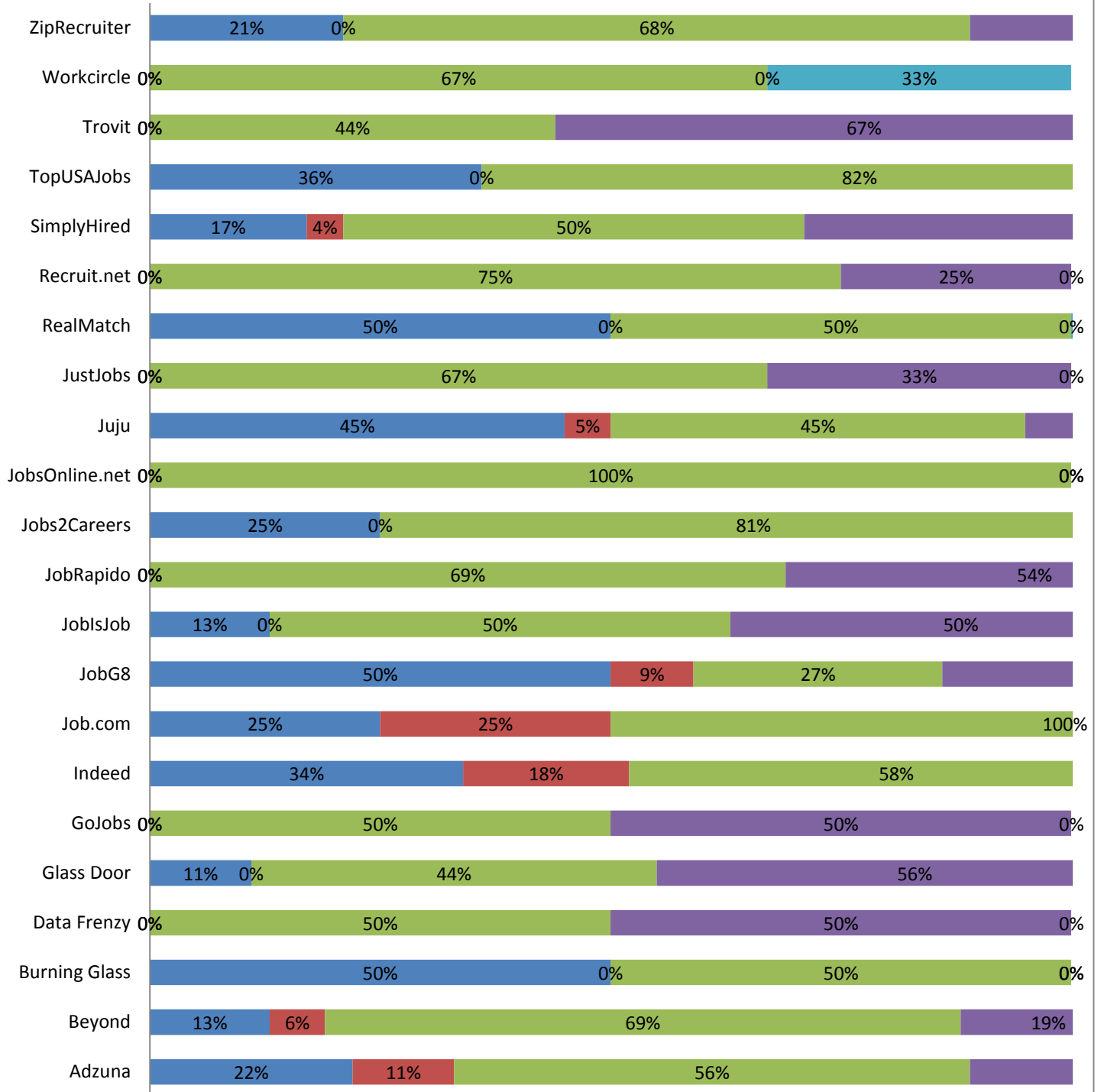
Which of the following companies have you utilized for some type of aggregator service (PPC, job backfill, etc.) in the past 12 months?



Comments:

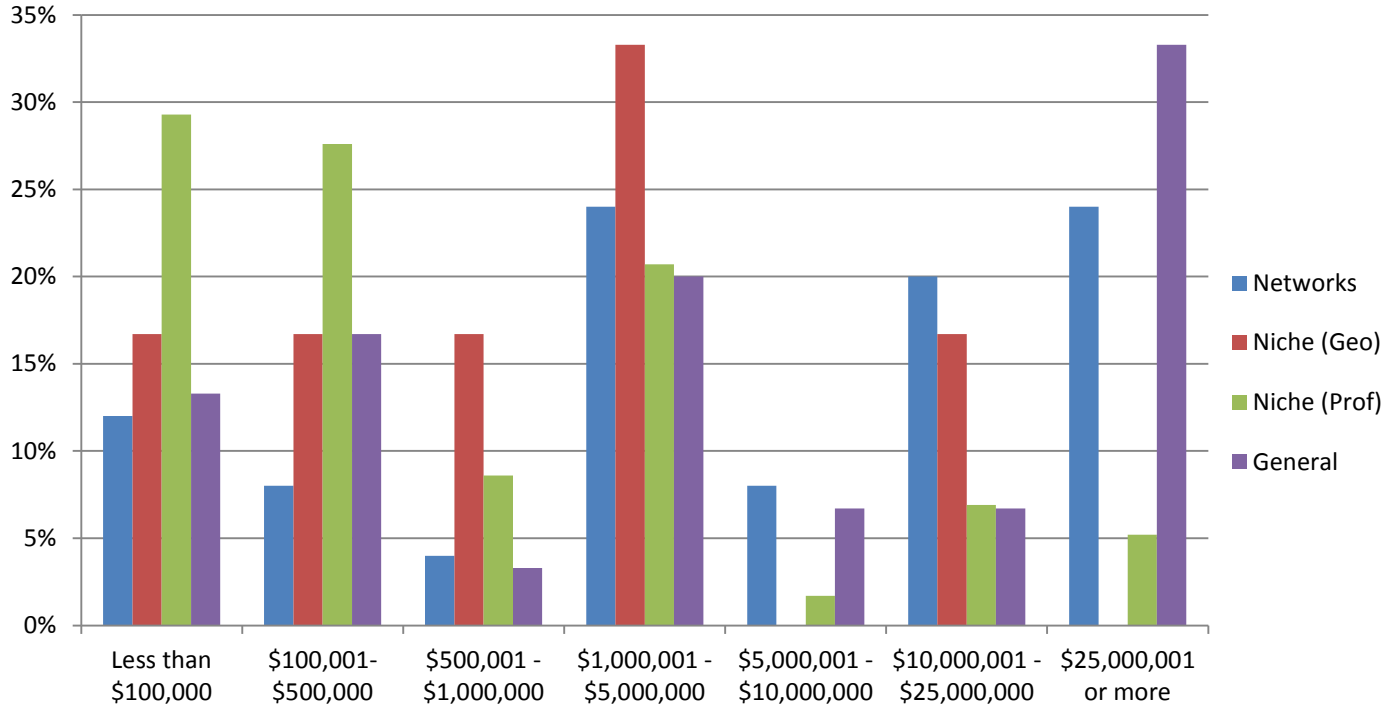
- “Aggregators are - in my opinion - just a SEO-optimized sales channel for other job boards and a few companies. As a small niche job board operator, I sometimes get multiple calls a week from Indeed, them aggressively pitching me. It's like their business model is based on selling very aggressively. The quality of visitors (time spent on page, page views per visit, newsletter signups) is significantly lower than my organic searchers. Their aggressive sales technique have made me distance myself from them, but their PPC model is interesting and something I'll be looking into.”
- “I find them to be a necessary evil. They have , on numerous occasions, gone after my clients.”
- “Good ones that target specific niches successfully will be of value to our site.”

Please indicate how you use each aggregator



- Job backfill from aggregator (generates revenue)
- Job backfill from aggregator (does not generate revenue)
- Sponsored jobs on aggregator site
- Job feed into aggregator site (organic)
- Purchase candidate resumes or profiles from aggregator

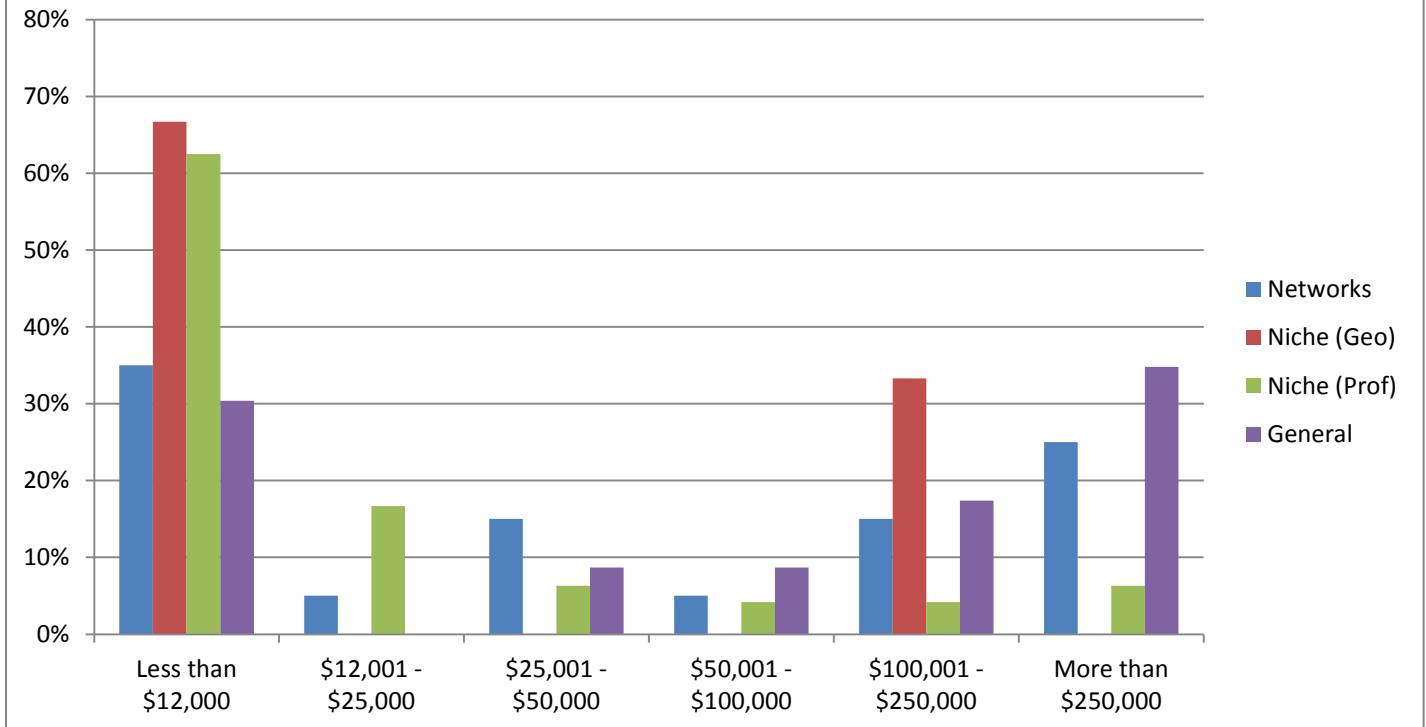
What is the approximate **annual revenue** for your job board business, based on the past 12 months? (by site type)



Comments:

- “The evil we unfortunately cannot live without. They will be part of the demise of job boards in highly contested markets unless the major players can collectively decide not to use them. Unfortunately this is not the case in my territory where I am forced to use them as my competitors do.”
- “Indeed has completely ruined our relationship as a Job Board partner. We will not be working with them ever again.”
- “In Australia they have not had the impact on other regions due to the one dominant job board in the country, seek.com.au who don't allow indexing of their jobs. it will be interesting to see if they can alter the mindset of advertisers to a ppc model. I have noted aggregators have had more success in geographics where there is no singular dominant participant.”

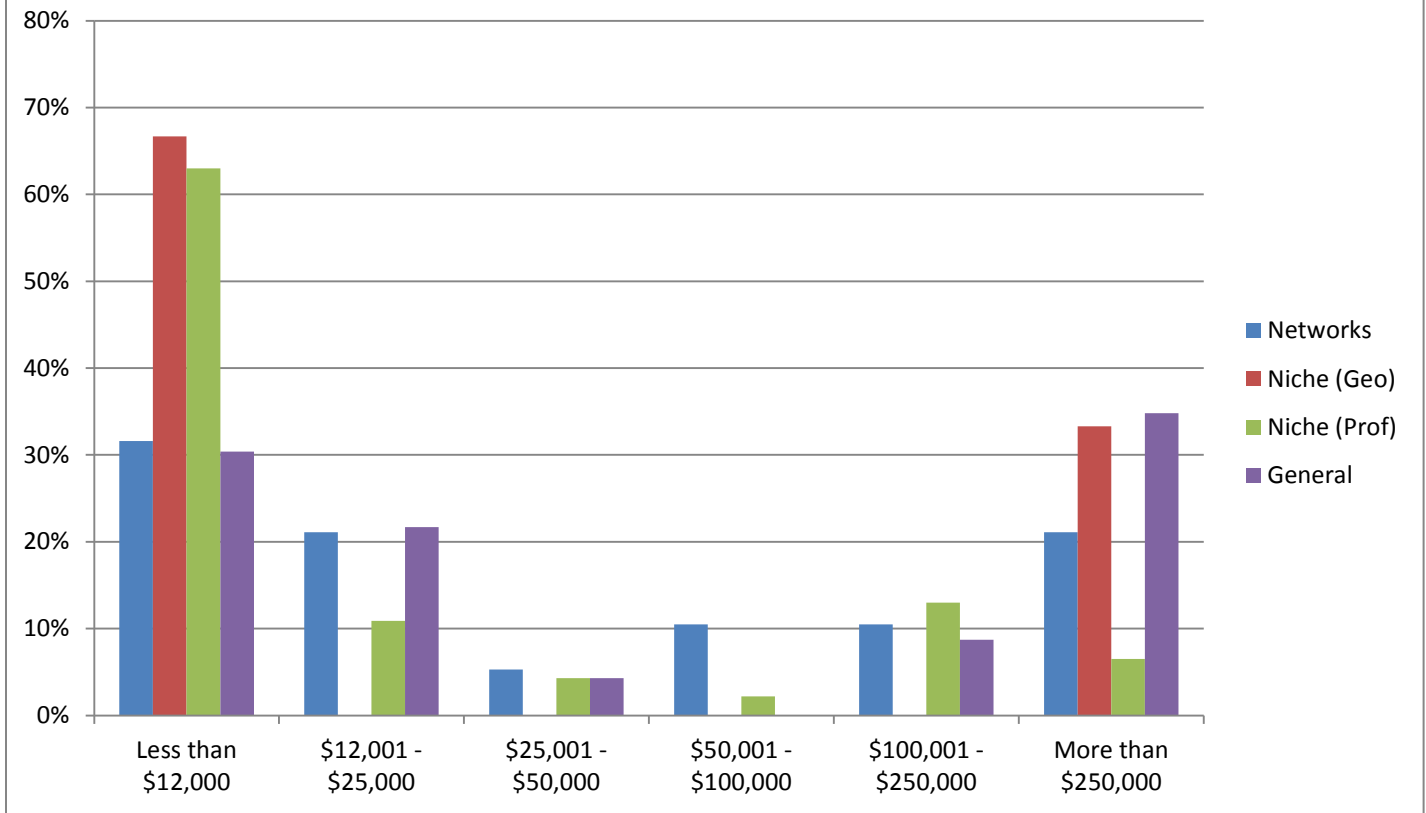
How much does your business spend annually on aggregator services? (by site type)



Comments:

- “Aggregators have adversely impacted our search engine results rankings in terms of job and company listings. Google is not good at recognizing the original source of listings when it comes to job aggregation. We continue to test ways to improve our search engine rankings while continuing our partnerships with aggregators.”
- “I believe that more and more niche and general job boards will adopt or increase their reliance on aggregation to generate both revenue and traffic. I do not see aggregation as a zero sum game where only one side can win. Rather, I believe that many deals exist for virtually every board which allow both parties to be stronger with the deal than without it.”
- “Two years ago, got the boot from Indeed's organics (was investing approx. 40K / year in PPC with Indeed) after three solid years of participation. Knew the day would eventually come, but was unhappy with the unprofessional way Indeed handled it. Since then, shifted most aggregator budget to SimplyHired.”

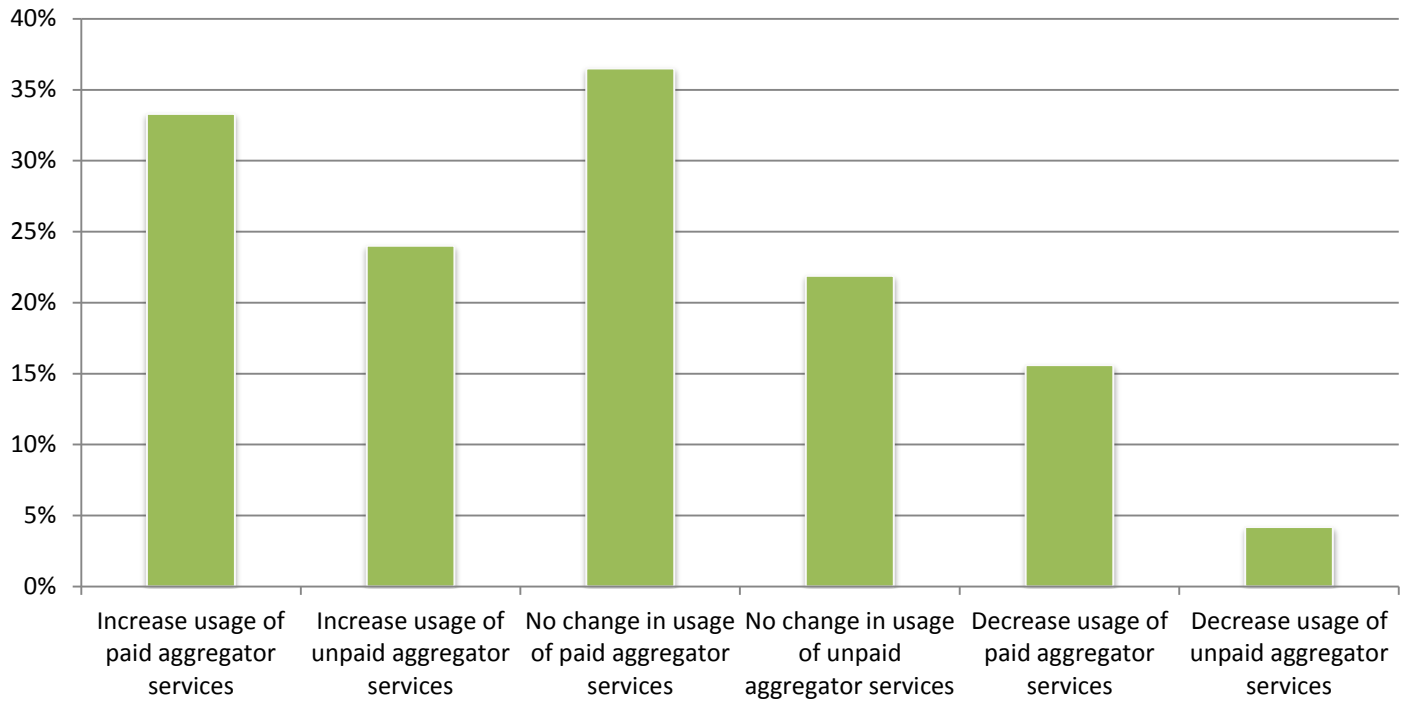
How much annual revenue do aggregator services generate for your business? (by site type)



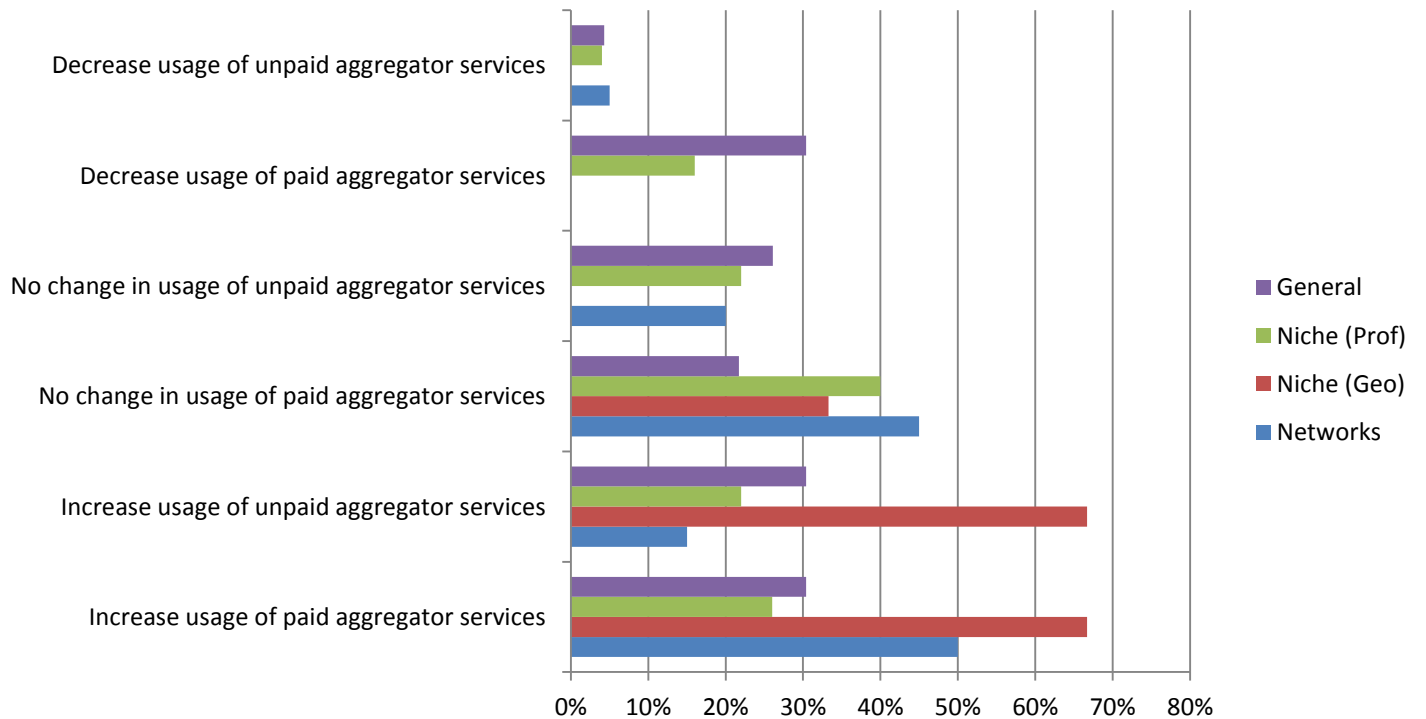
Comments:

- “What we are hearing from our customers is that the PPC cost is going up rapidly and they are getting diminishing results (just anecdotal data from conversations and this could be due the fact that it is getting harder to find new candidates). This has made our job slot subscriptions more palatable and economical. We are feeling a real momentum back towards niche boards from the "All Jobs" aggregators. That being said we are also launching a PPC aggregator like offering on our board that will allow us to be more competitive for some of the bigger deals that are going to the aggregators because PPC continues to be an easier (though we believe more expensive) decision for large companies.”
- “We recently suspended all paid / sponsored feeds to Indeed as the overwhelming majority of traffic they send is organic, and conversion rates are the same.”

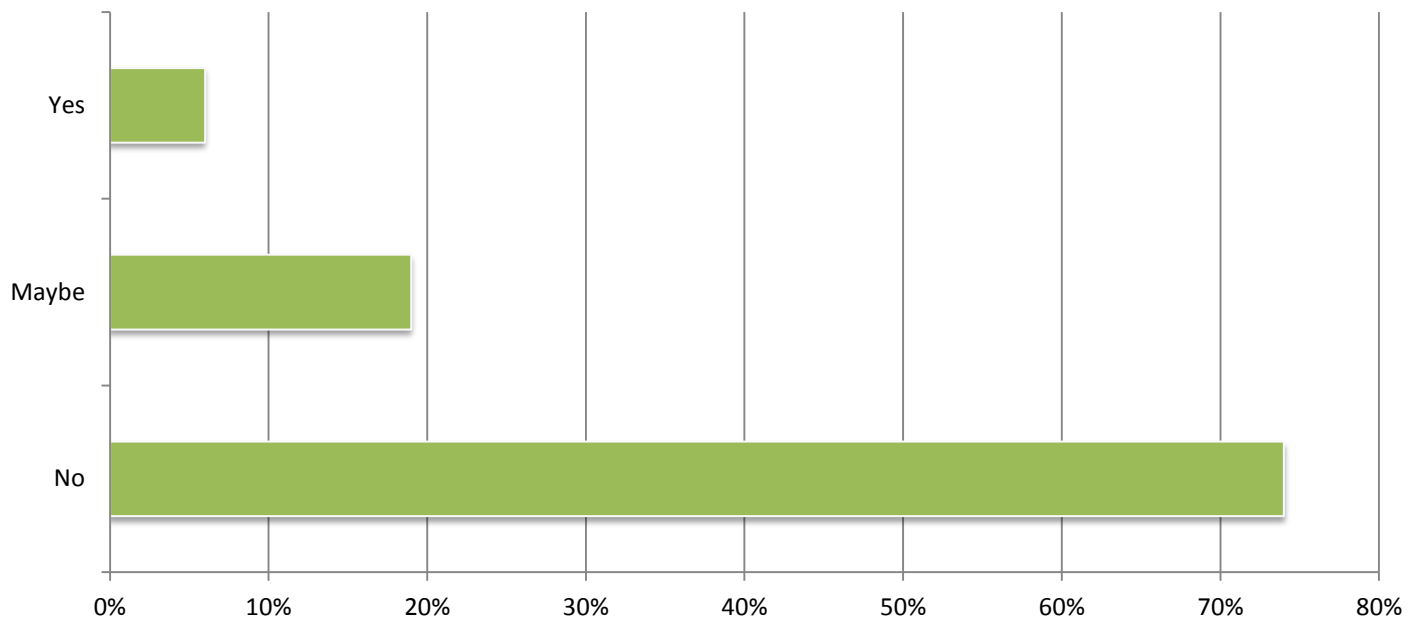
What are your plans for aggregator usage during the next 12 months? (all)



What are your plans for aggregator usage during the next 12 months? (by site type)



Will LinkedIn's and Monster's recent decisions to provide aggregated jobs have any impact on whether you continue to use aggregator services?



Comments re: "Will LinkedIn's and Monster's recent decisions to provide aggregated jobs have any impact on whether you continue to use aggregator services?"

- "Job posting will become a commodity. Quality will become the only way to charge for recruitment. Look for matching"
- "We'll continue to use aggregator services and follow how things go with them. We might see if we can work with them if need be."
- "It will make everything cheaper."
- "It depends upon pricing and results. In my niche aggregators do not deliver many quality candidates. Am also looking for an approach that does not take candidates off my website for them to apply to a position."
- "I don't think so. LinkedIn is a more serious threat than Indeed. But, I am not sure that the fact that LinkedIn is aggregating jobs will change what we do with Indeed or SimplyHired."
- "Don't know yet. Might check out Monster just to give Indeed more competition."
- "Not directly, it won't necessarily impact the quality of the traffic we buy from aggregators. Ultimately we track cost per action, so if those distribution deals dilute the quality of the traffic of those aggregator campaigns then we'll have to reconsider spending on a case by case basis."



Job Board Doctor

About Job Board Doctor:

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

- Short and long-range planning
- Strategy
- Research and analysis
- Sales planning and training
- Product development and launch
- Marketing planning
- SEO
- Social media
- Content creation
- Site and user interface analysis

Jeff Dickey-Chasins is the Job Board Doctor, 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 hundreds of job boards and recruiting sites over the past 20 years. He has published numerous articles about the job board industry, and speaks frequently at industry events and webinars.

You can learn more about Job Board Doctor here: <http://www.jobboarddoctor.com>