

2018-19

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 recruitment marketing industry. This year we had a total of 195 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 worldwide. The questionnaire required approximately 10 minutes to complete.

The survey included 31 questions covering:

- Perceived threats and opportunities
- Demographics
- Site performance
- Business models
- 2018-19 business plans

Survey responses were collected September - October 2018.

Executive Summary

Here are some of the key findings from the 2018-2019 survey:

- **Lack of candidates** is the biggest threat for all respondents.
- 62% of respondents saw their **revenue increase** during the past 12 months.
- **Duration-based job postings** account for 68% of the revenue for respondents during the past 12 months, vs. 14% for cost per click / cost per application.
- **Job alerts** continue to be the most effective traffic source for recruiting sites, regardless of location or type, followed by SEM and the Google for Jobs search box.
- The **dominant aggregators used** are Indeed (49%), ZipRecruiter (48%), Jobg8 (38%), and Adzuna (38%).
- **External economic events** (such as Brexit, NAFTA, etc.) are considered to be the biggest competitive threat to respondents' businesses in the coming year.
- 57% of respondents expect to **raise rates** during the coming year.

Key respondent quotes:

"Beware of Google. This could be a repeat of Indeed."

"AI will lead to a transition for the online recruitment industry."

"Fragmentation of the online recruitment market is the over arching view, lots of competition and loads of disruption in tech and social, careful and prudent navigation is required."

"Being a niche job board, it is increasingly difficult to compete with the bigger job aggregators that have an endless budget to provide upgrades and technology improvements."

"Candidate application volume remains very limited, so we will likely try to 'pivot' (Oh how I hate that word - so overused) and seek to monetize content more than job posts...Selling job ads and resume searches may become a secondary focus."

"LinkedIn seems to be the go-to place for many employers now, and the constant national advertising by Indeed and ZipRecruiter (coupled with their slick interfaces) seems to be raising expectations through the roof."

"We are greatly expanding our recruitment marketing services, which we believe will strongly enhance the services we already provide to our clients."

"Job boards are at the mercy of the economy, good job market with high employment = lower number of posts and fewer candidates."

"Change is good, and Indeed taking market will change since our clients are reporting huge unwanted applications for positions-need quality which we can do."

"We could dominate our space if we just got out of our own way."

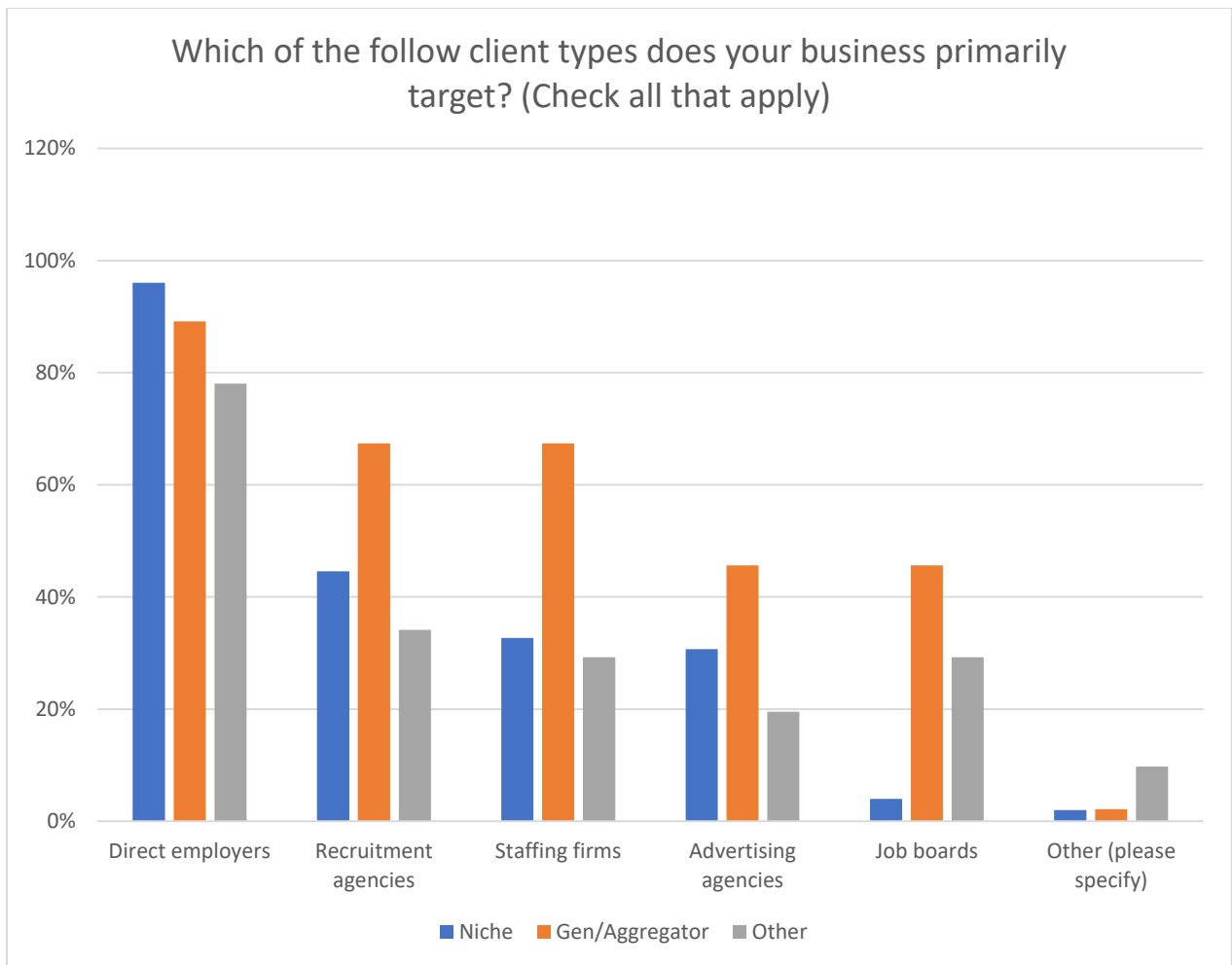
"Accelerated industry consolidation coming. Job boards will need to significantly expand service offering to survive IE : get into staffing services industry."

"Like always, you never know if you are surfing a rising wave or heading for a wipeout. But we've managed to stay afloat for 20 years, so the big stuff being thrown at us by Google and Facebook is just the latest in a long list of scary things. Who knows what will happen? I don't."

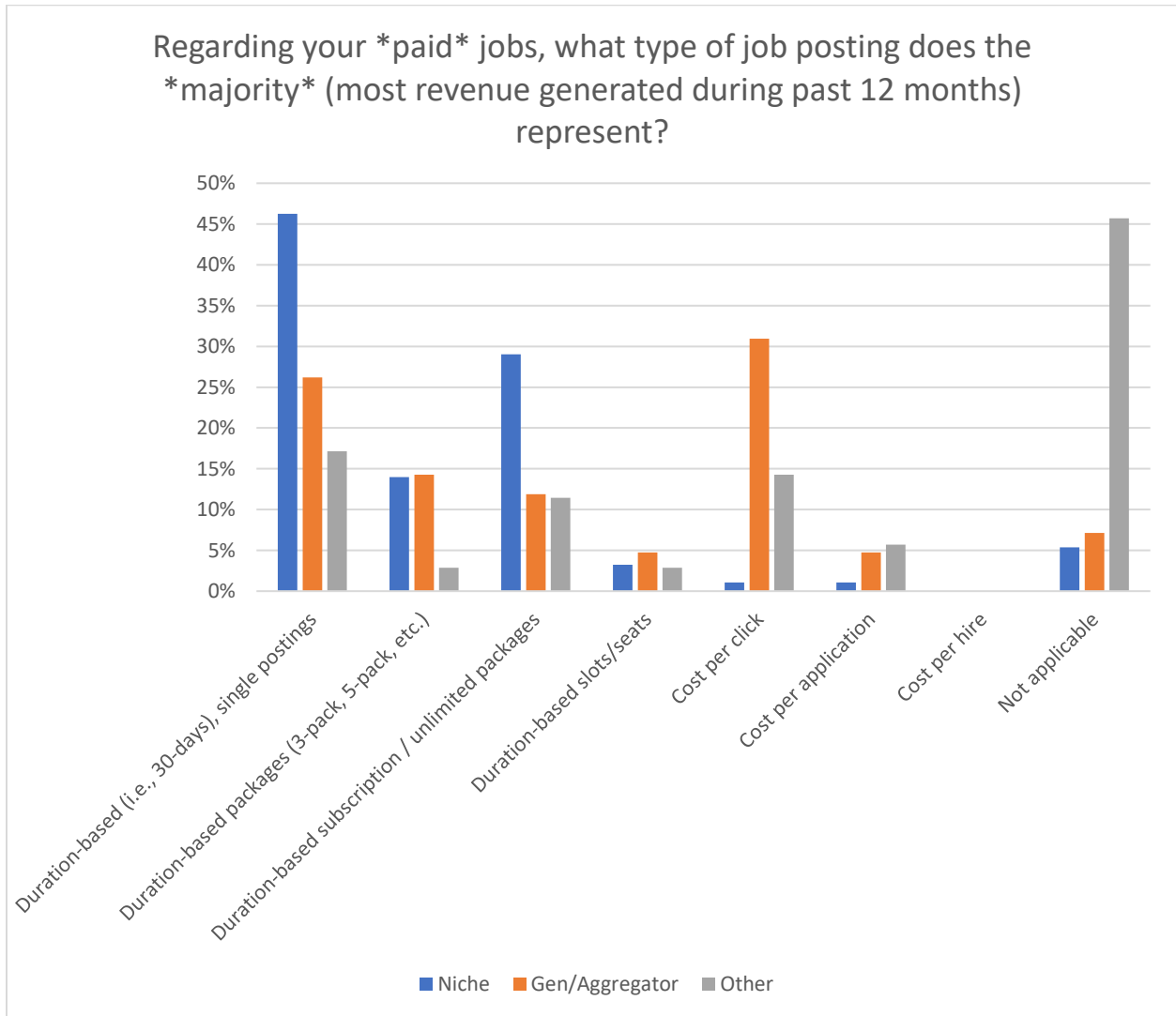
Select Crosstabs:

In order to provide additional insight to the research finding, we have included **a few key crosstabs** highlighting how different segments of the recruitment marketing industry behave. These are broken out by type of site: Niche sites, General sites & Aggregators, and Other (including sourcing tools, recruitment platforms, and agencies).

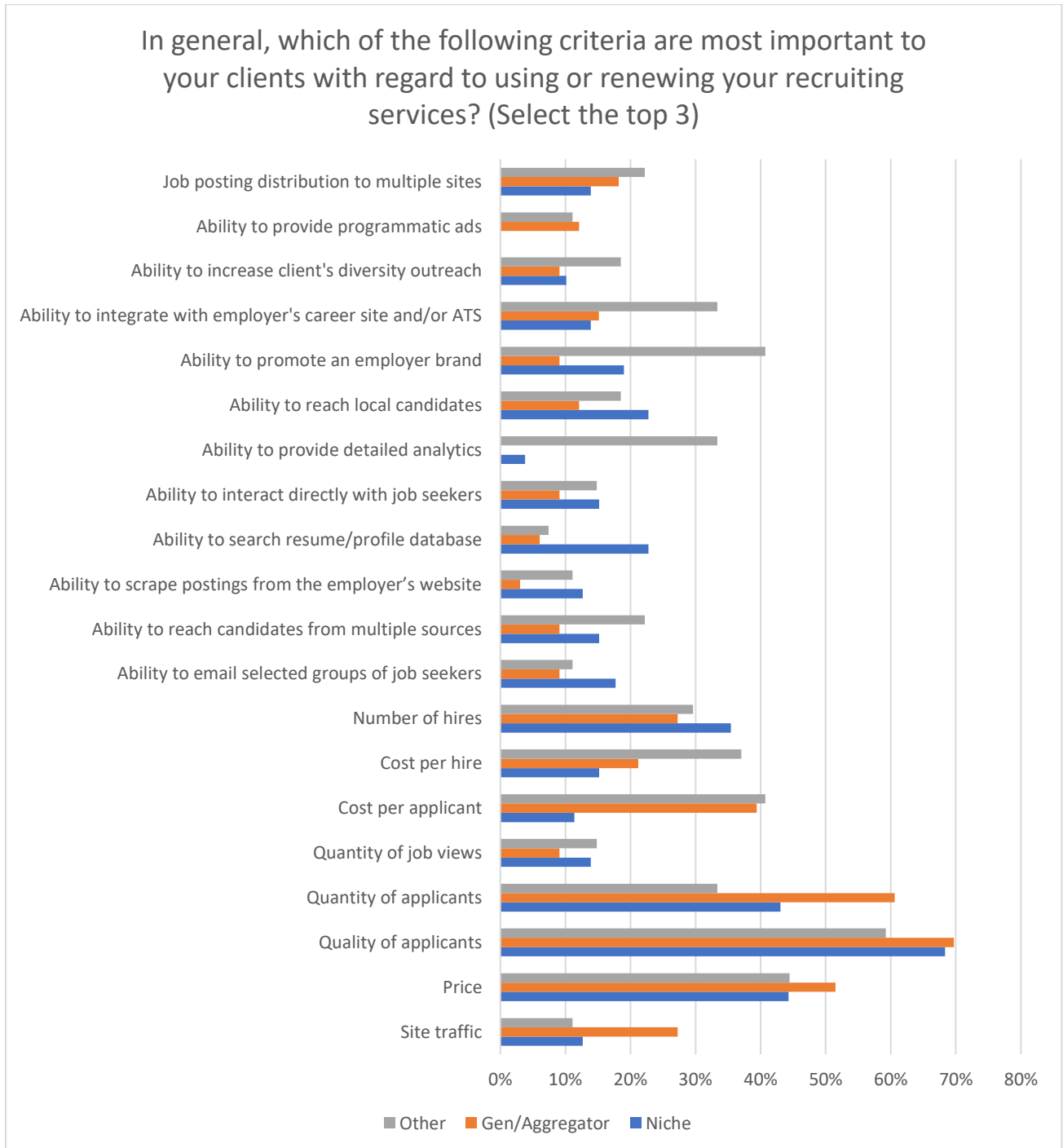
Finding 1: General sites and aggregators draw their clients from a **wider range of client types** than do niche and other services. This may be a result of their higher volumes in terms of traffic, etc., or it may simply be that general sites and aggregators focus on agencies and staffing firms more often.



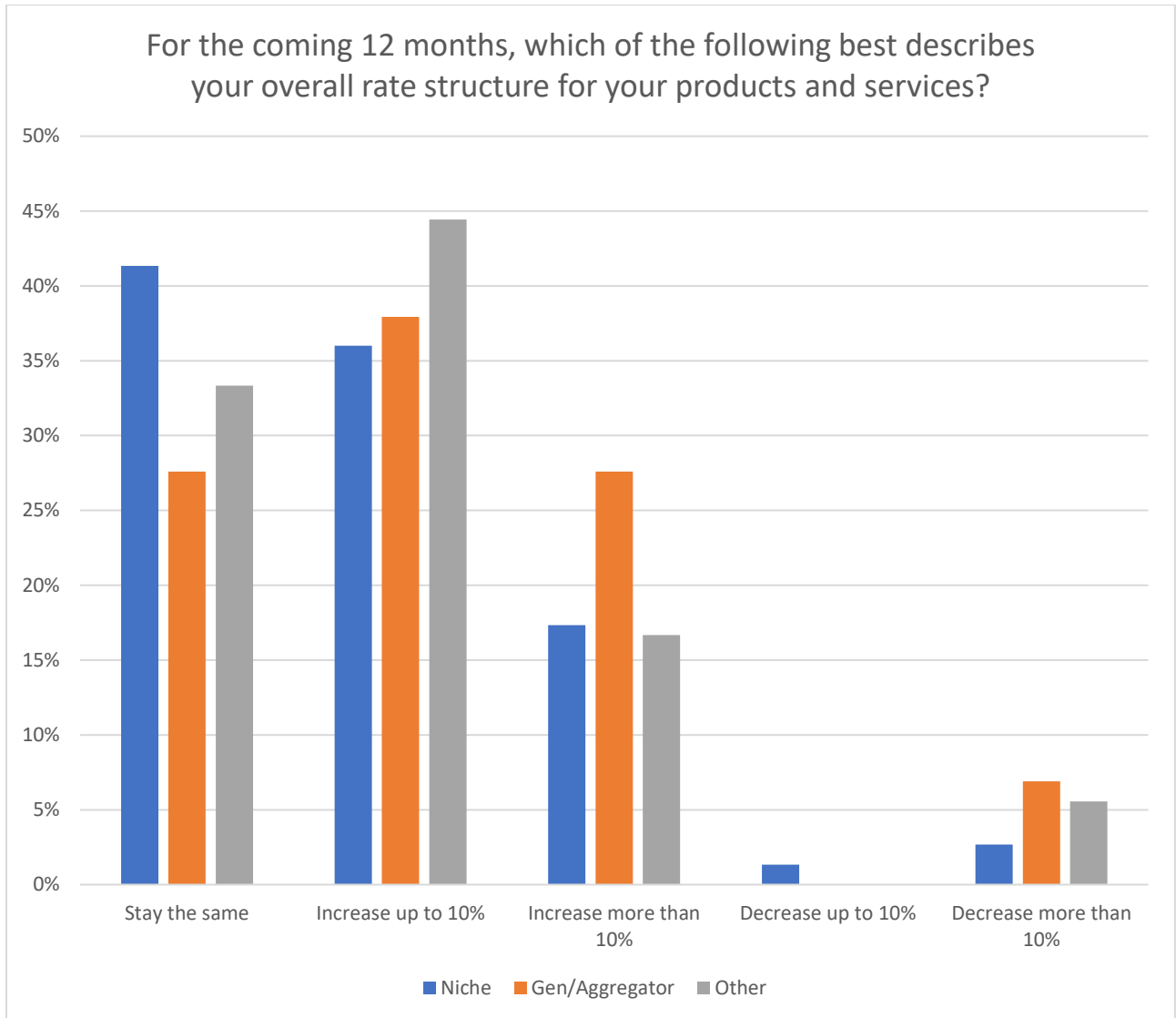
Finding 2: Niche sites derive most of their revenue from duration-based postings; general and aggregator sites get more from CPC. Other services are getting most of their revenue from neither CPC or job postings.



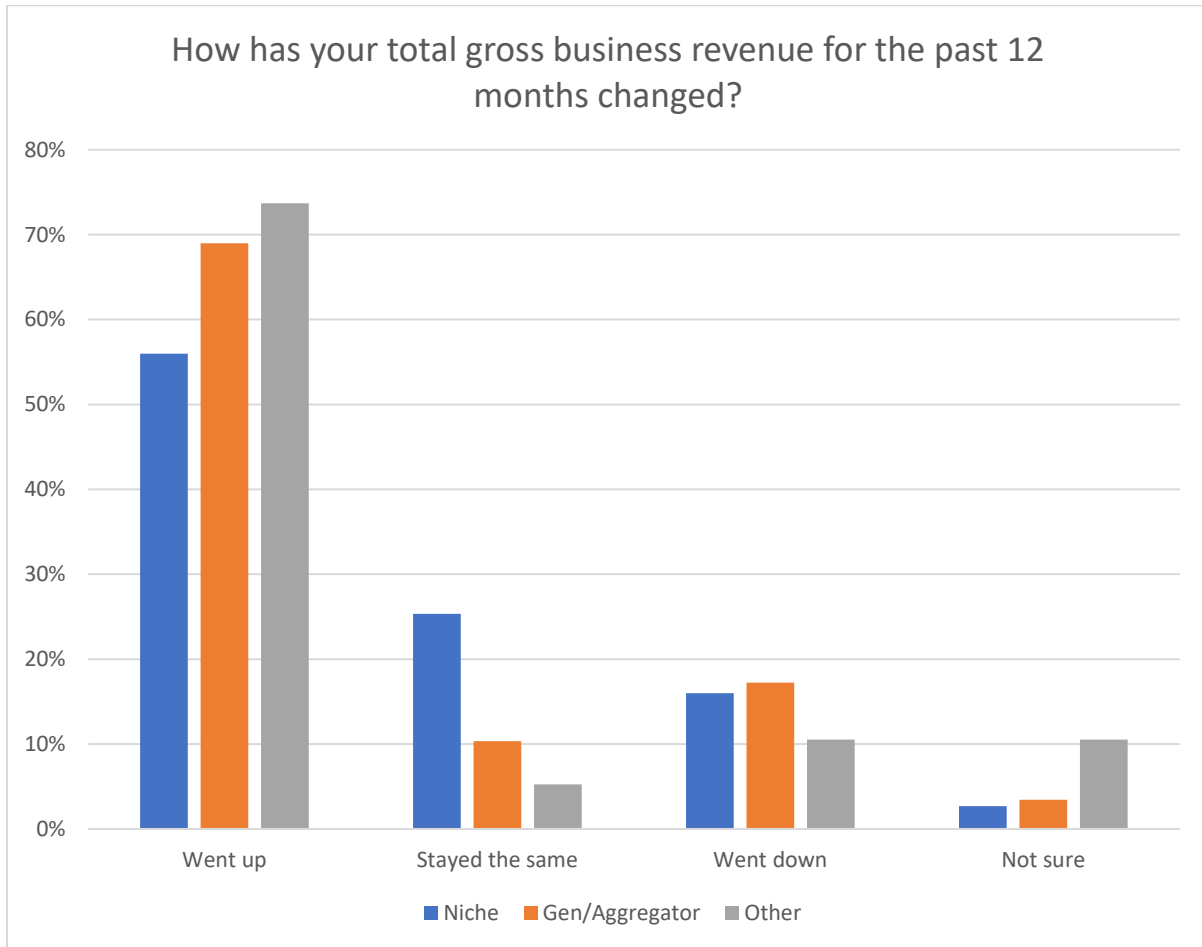
Finding 3: Clients for all 3 types value the quality of candidates most, but for general sites and aggregators, the quantity is also extremely important. For other services, the cost per candidate and cost per hire is critical.



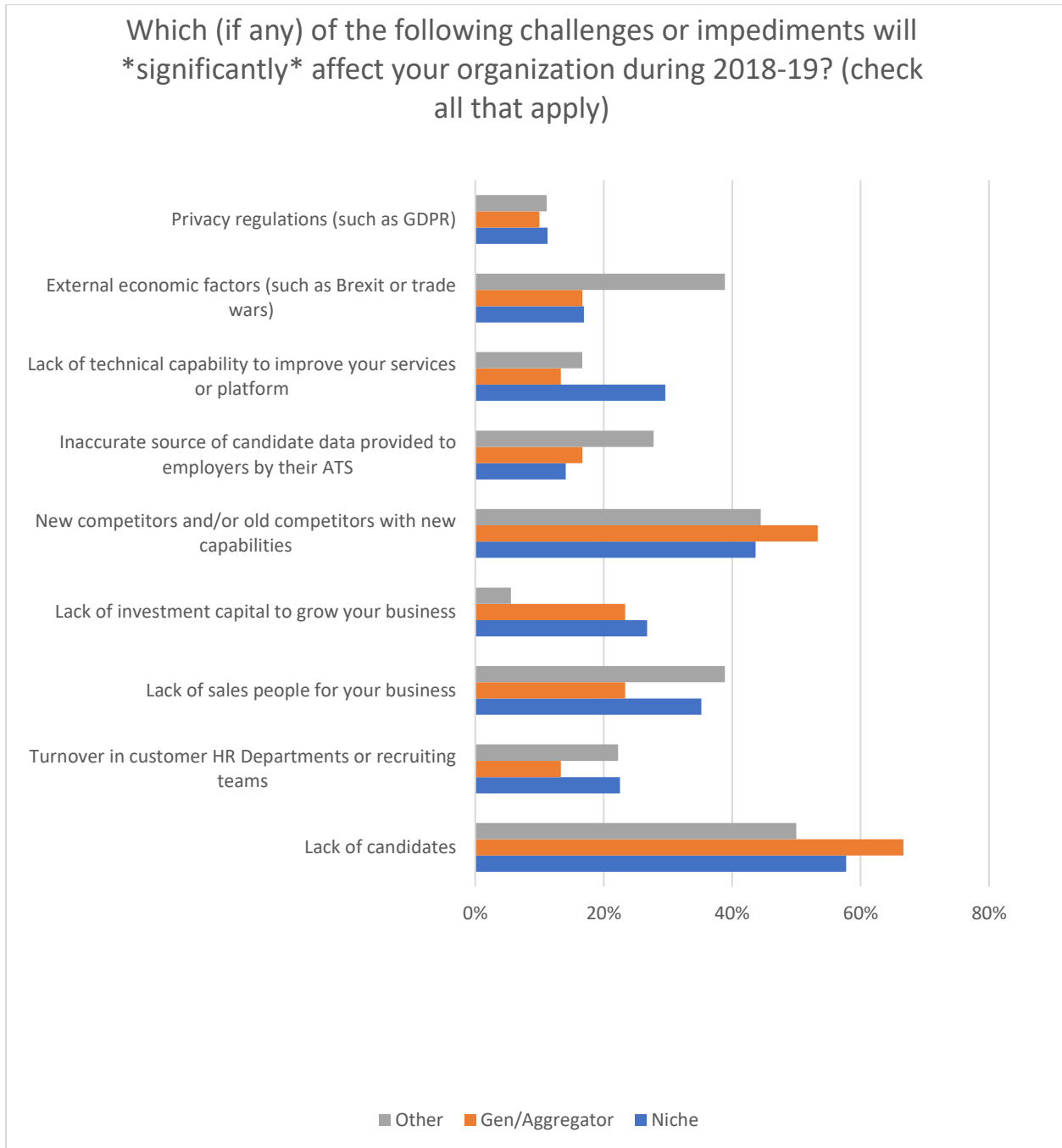
Finding 4: 52% of niche sites, 61% of other services, and 66% of general sites and aggregators were planning to increase their rates.



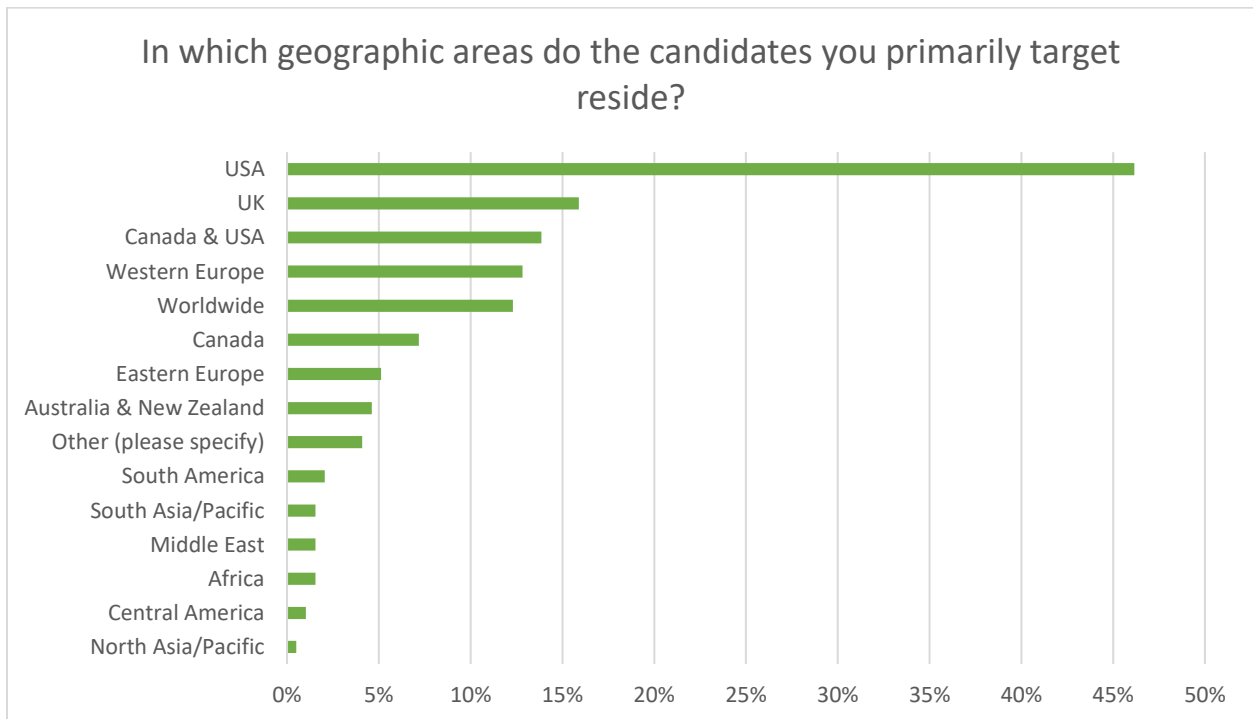
Finding 5: Revenue is going up across the board, but most dramatically for general sites / aggregators, and other services such as recruitment marketing platforms, staffing firms, and agencies.



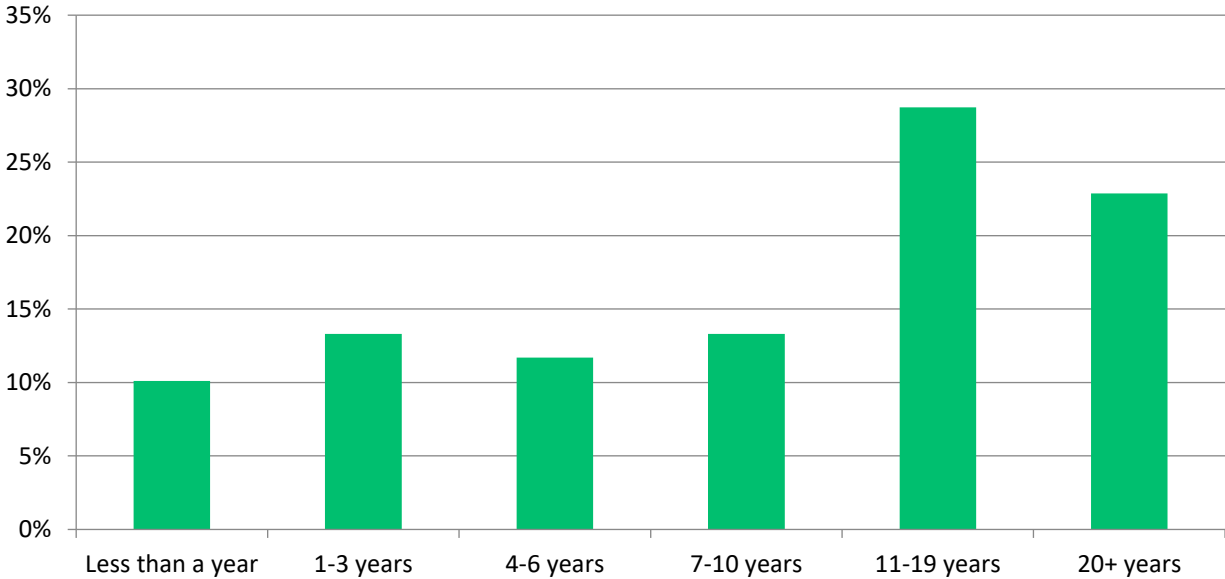
Finding 6: Lack of candidates and new competitors are common threats for niche and general sites, other services, and aggregators.



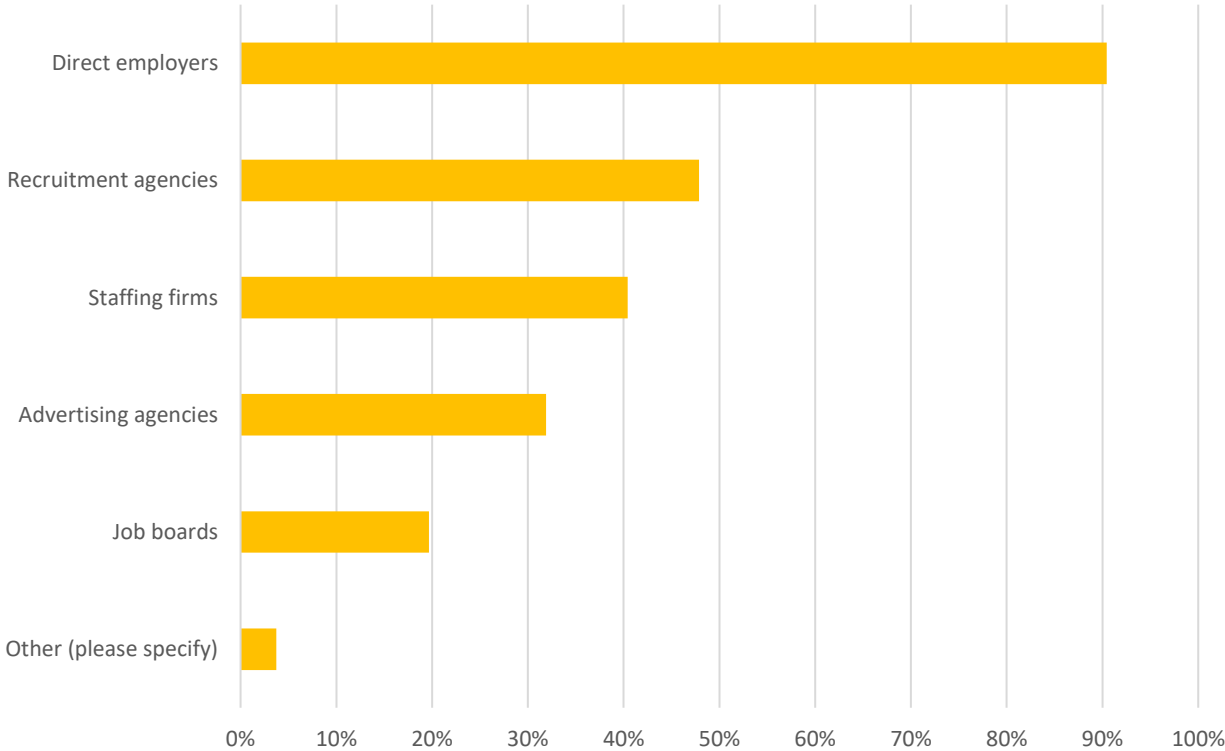
The Complete Survey Results:



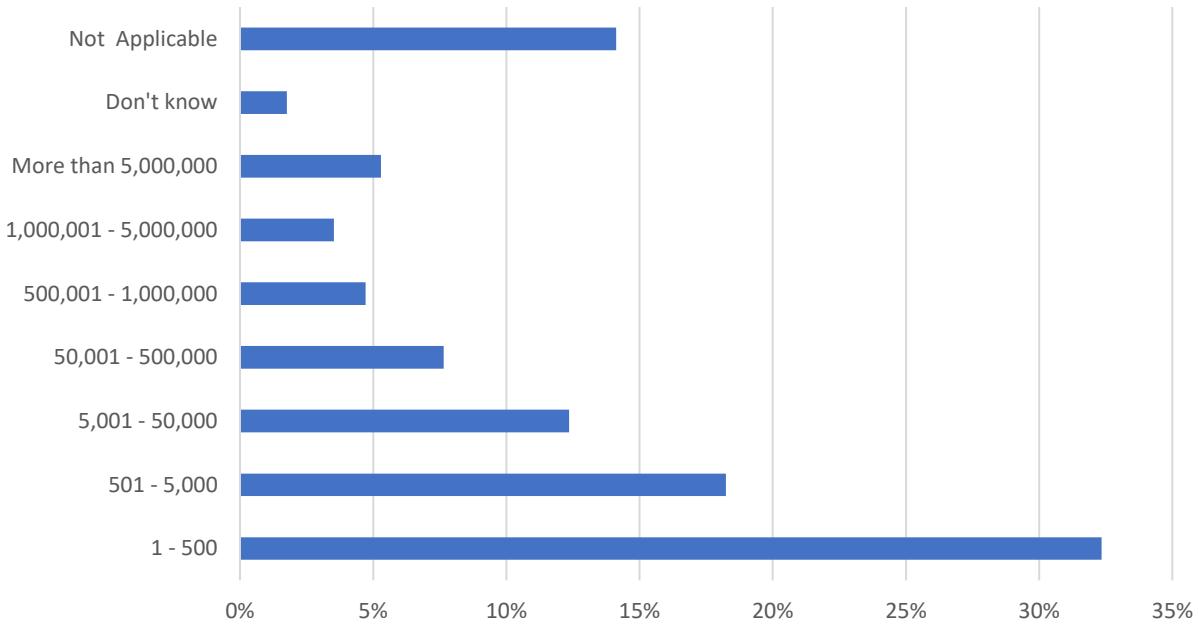
How long has your site or service been operating?



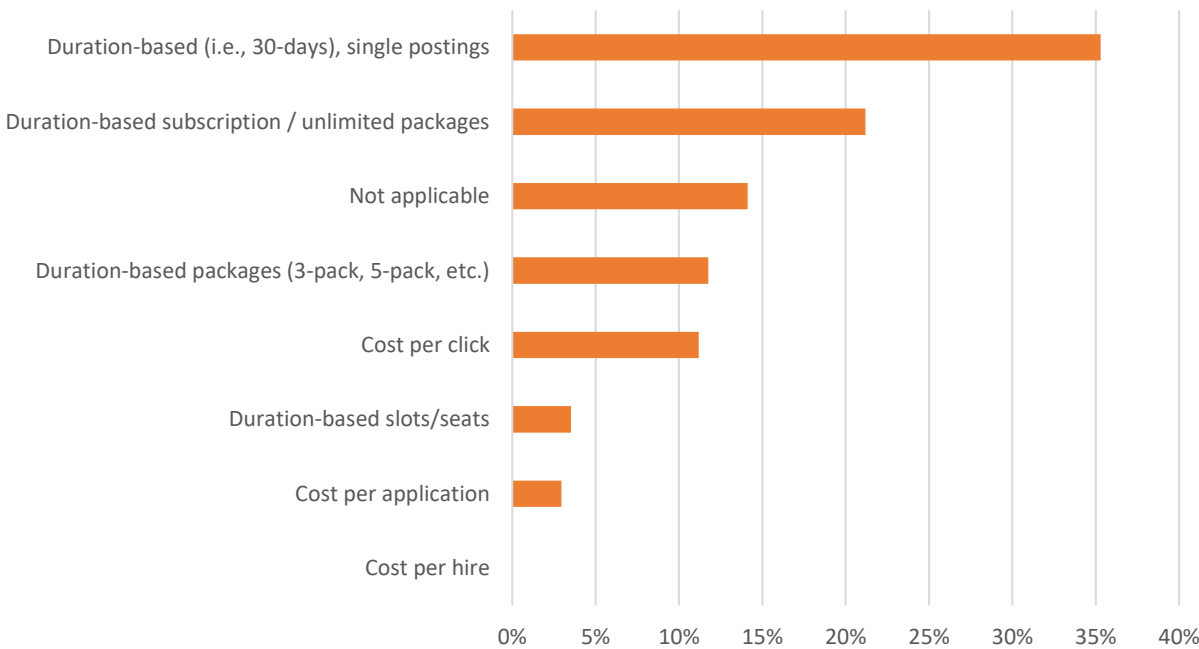
Which of the follow client types does your business primarily target? (Check all that apply)



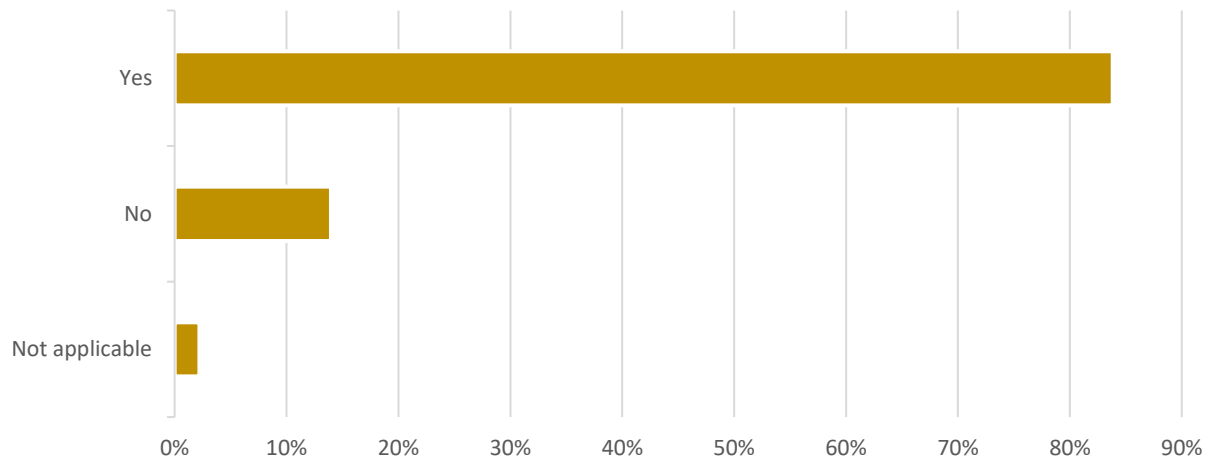
On average, how many new ***paid*** jobs (pay per post, pay for performance, or both) are posted on your site or service each month?



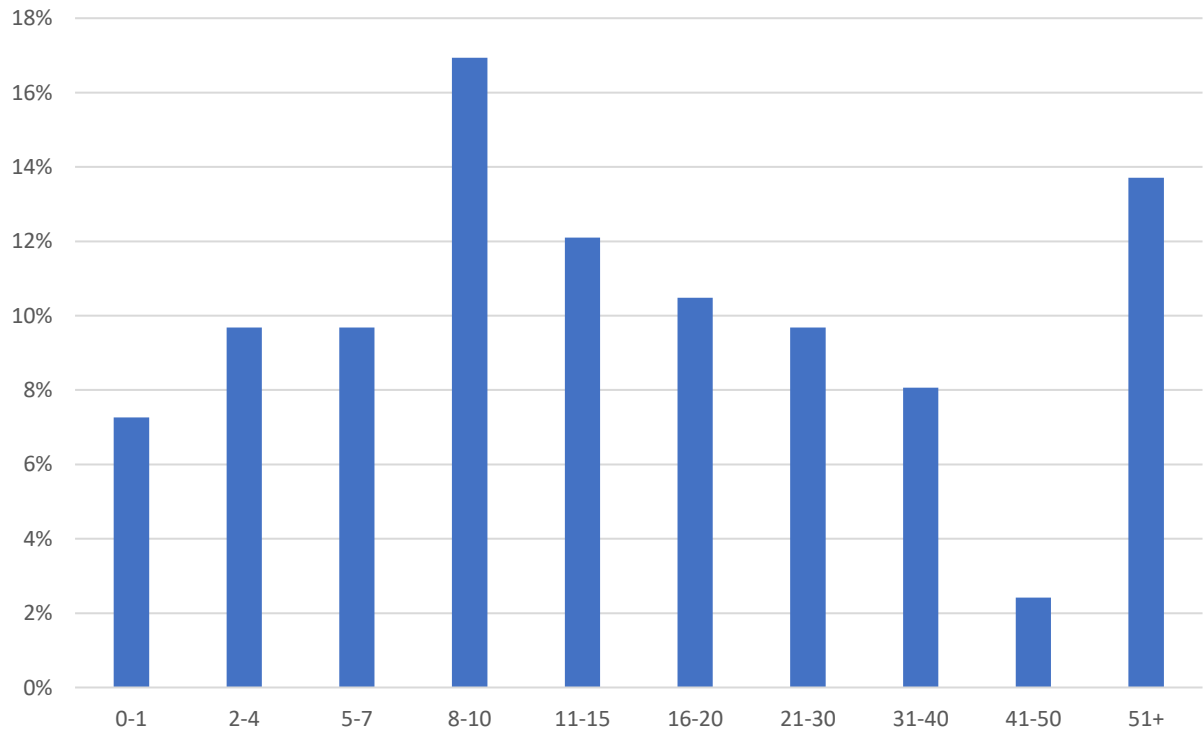
Regarding your ***paid*** jobs, what type of job posting does the ***majority*** (most revenue generated during past 12 mo.) represent?



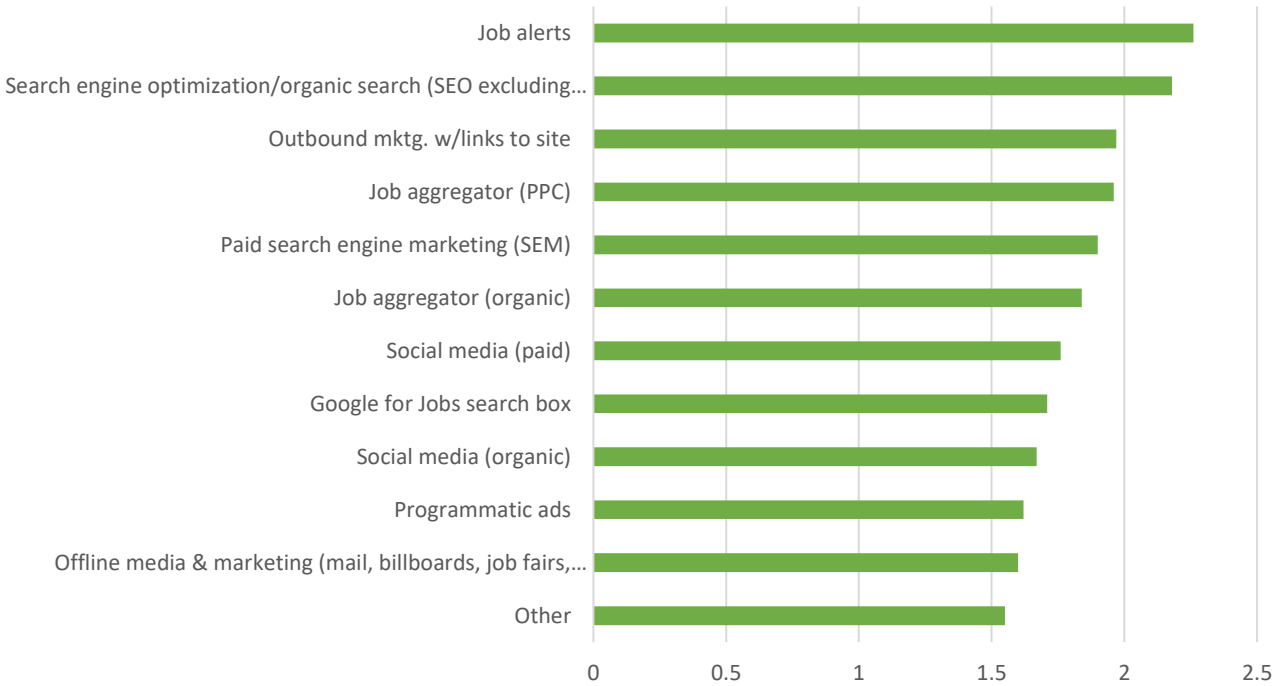
Do you track the number of application clicks for each posting on your site or service?



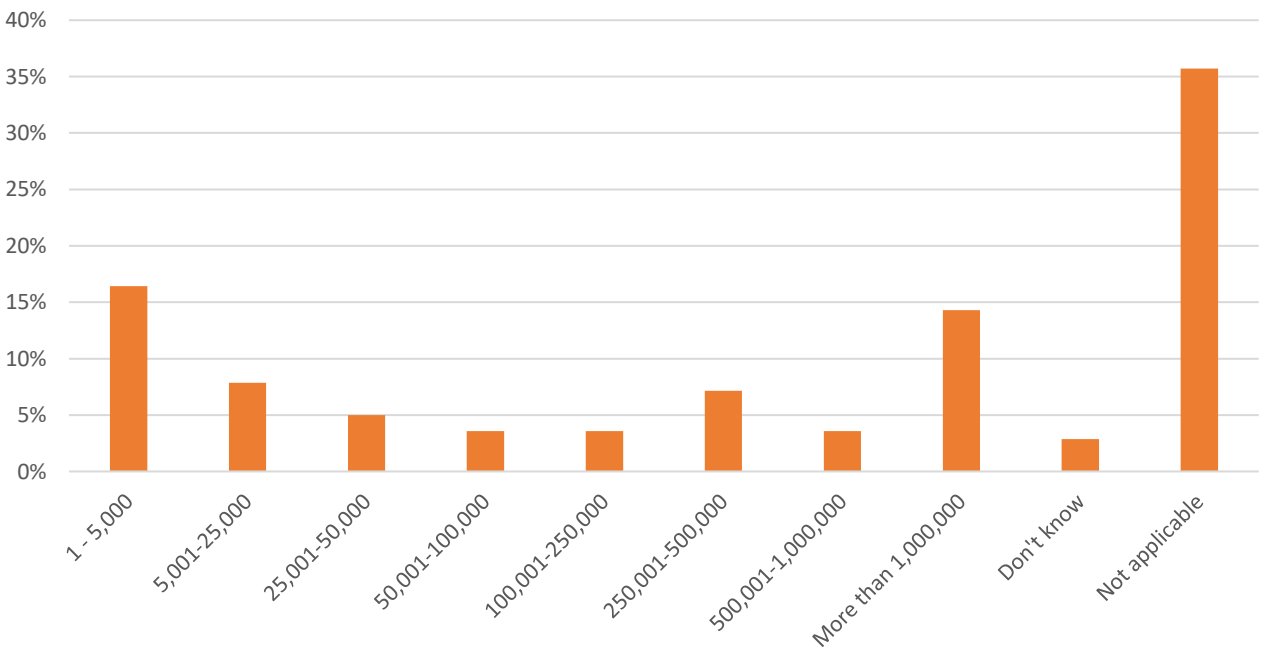
On average during the last 12 months, how many application clicks were made for the typical job posting over a 30-day period?



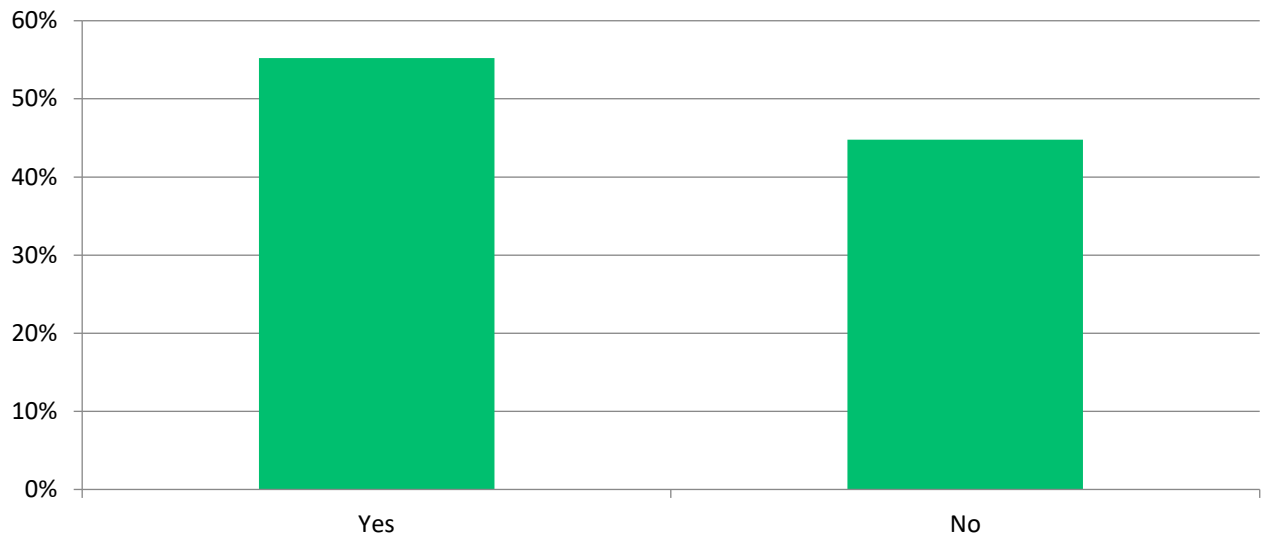
How would you rate the following sources of traffic to your site, based on the volume and quality of traffic generated?



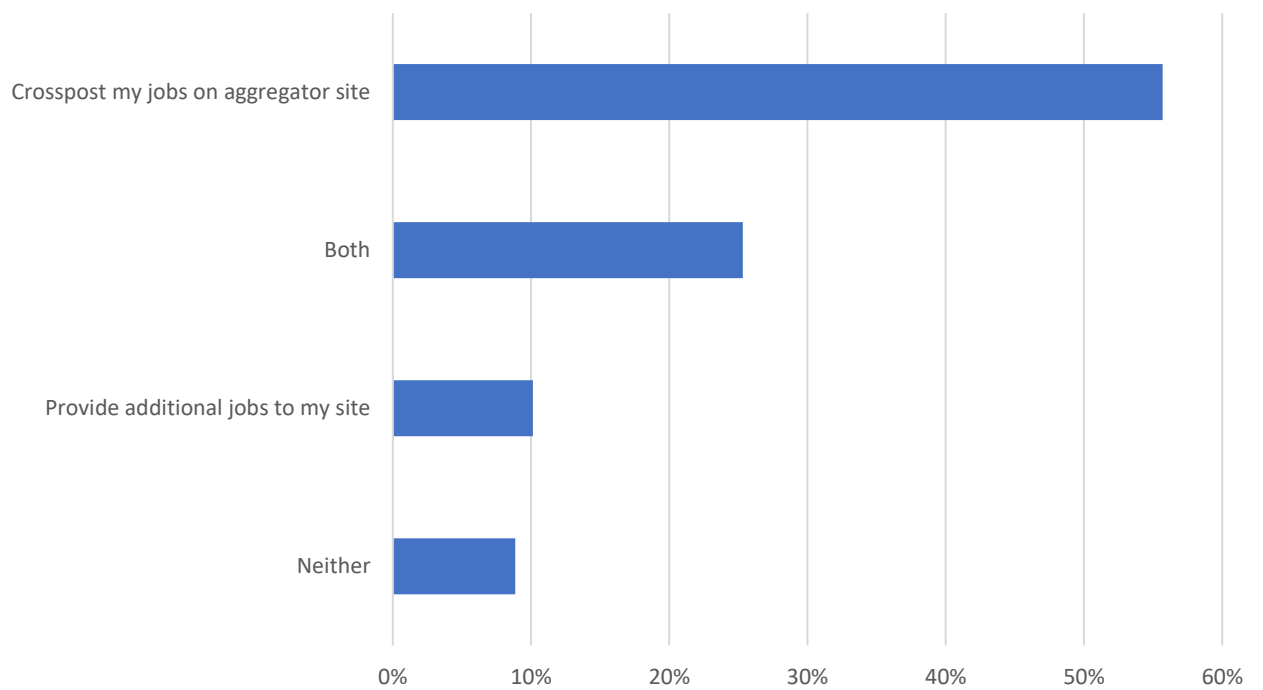
If your service offers a resume or candidate profile database that is accessible by employers, how many resumes or profiles are currently stored in the database?



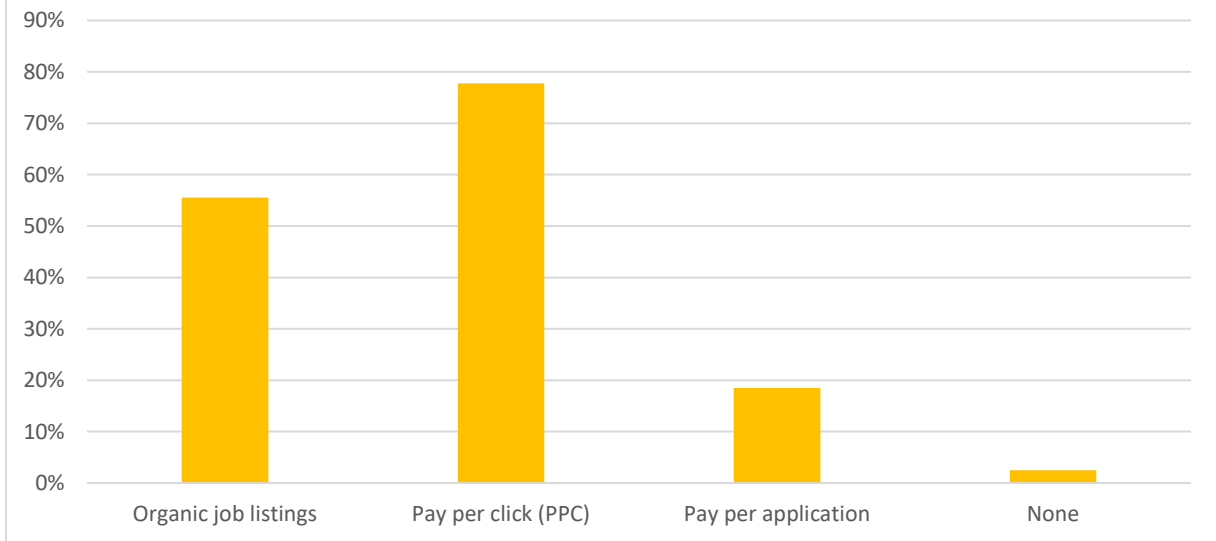
Do you currently use an aggregator (such as Talroo (Jobs2Careers), Adzuna, etc.)?



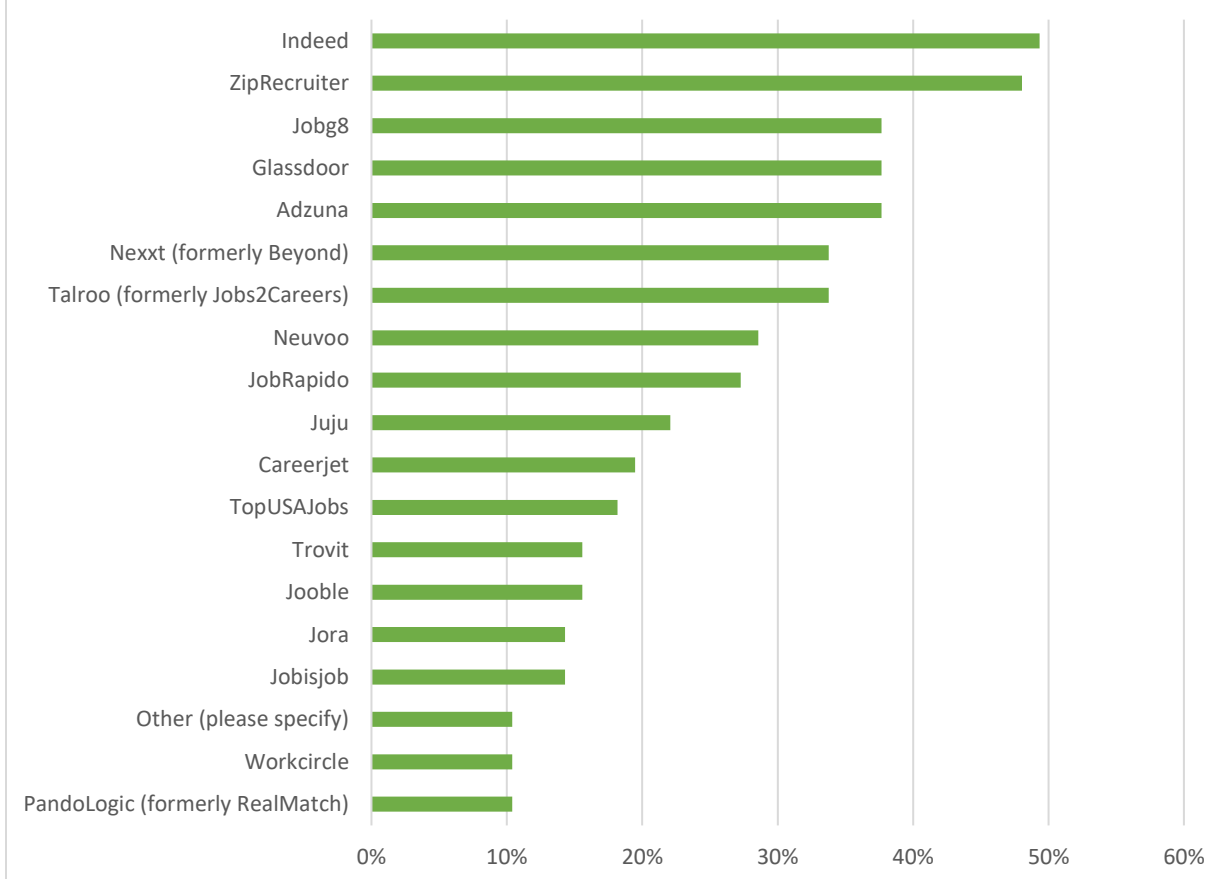
How do you use aggregators with your site?



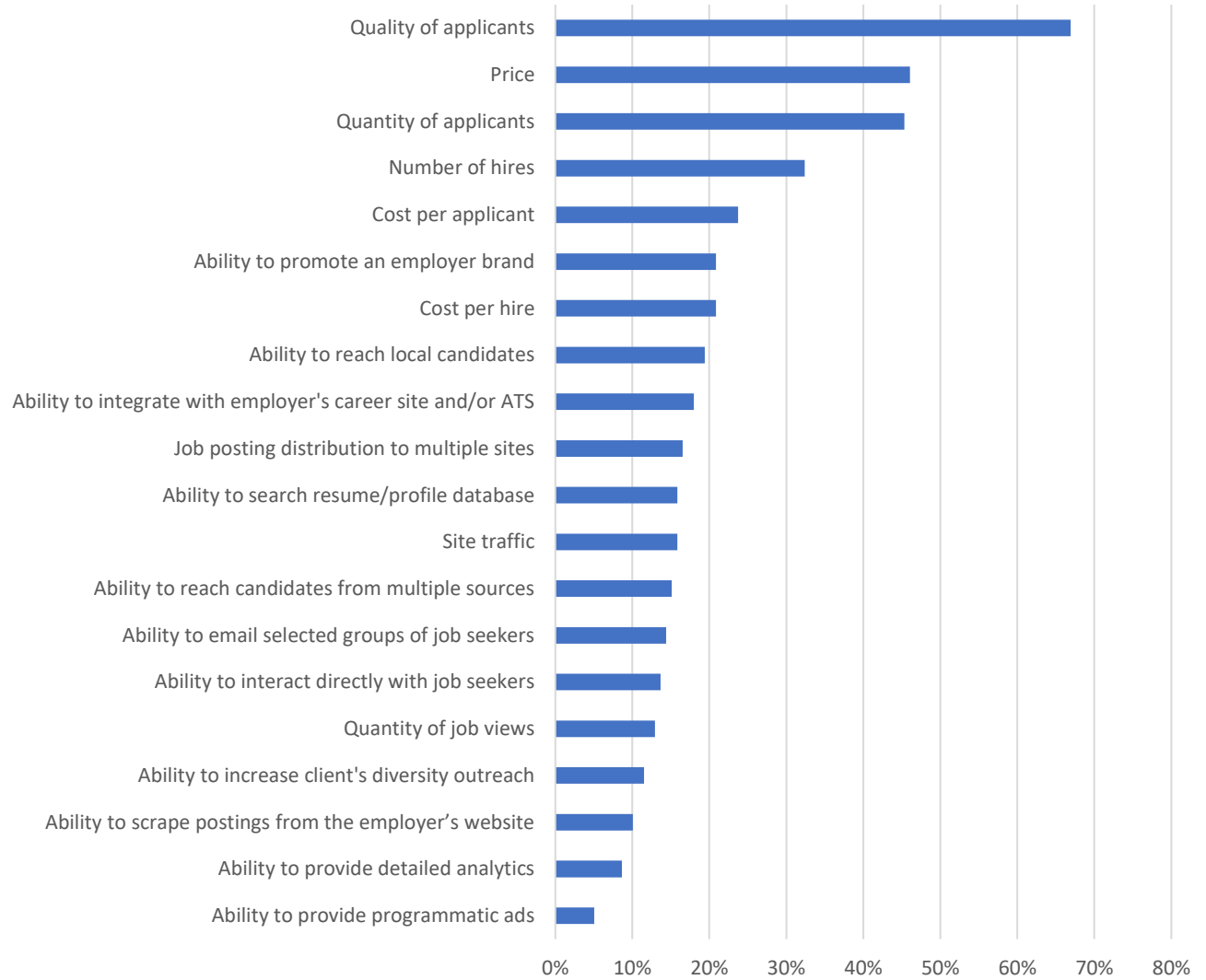
Which of the following aggregator services do you use to increase your traffic? (check all that apply)



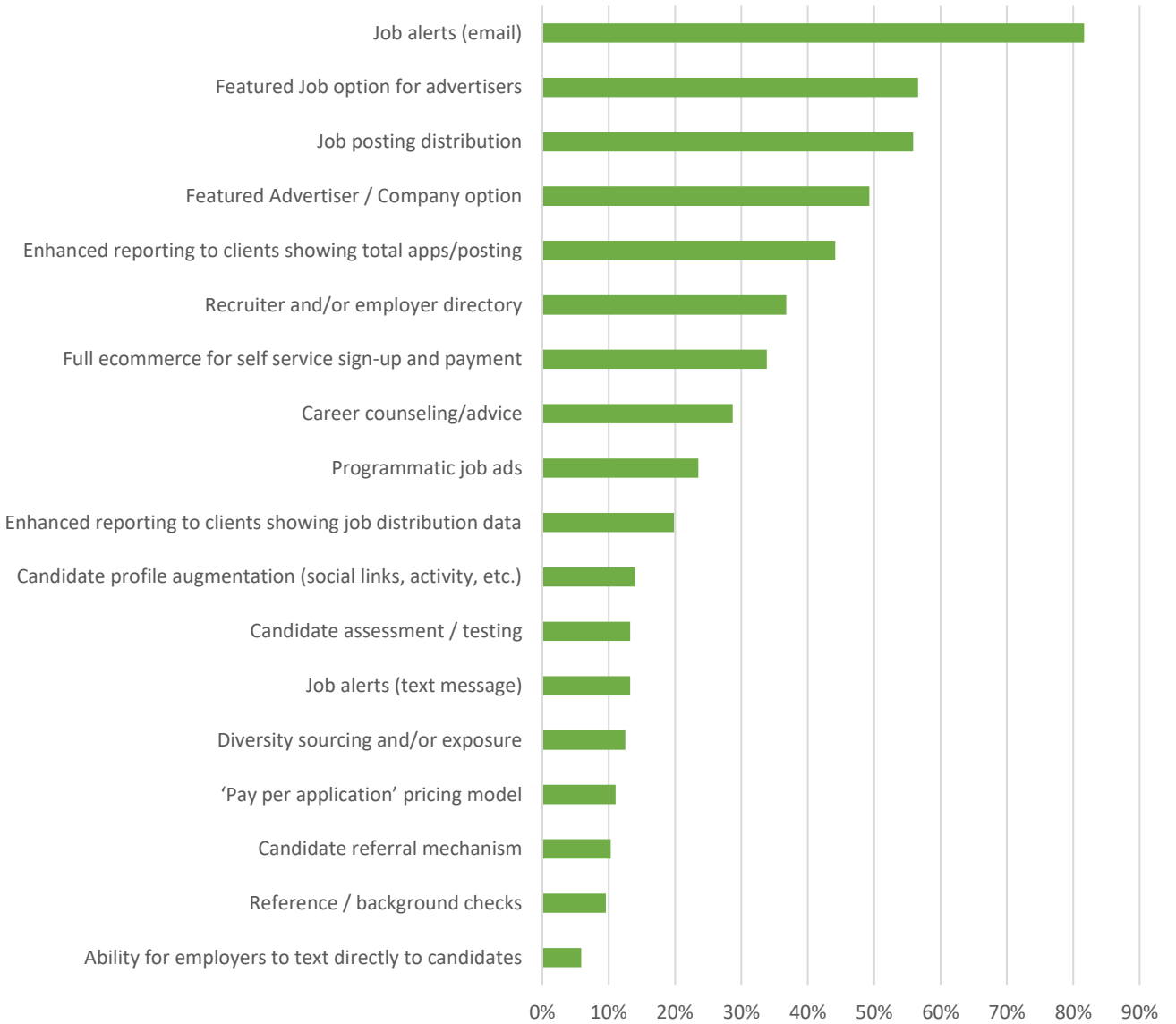
Which of the following aggregators do you use? (Check all that apply)



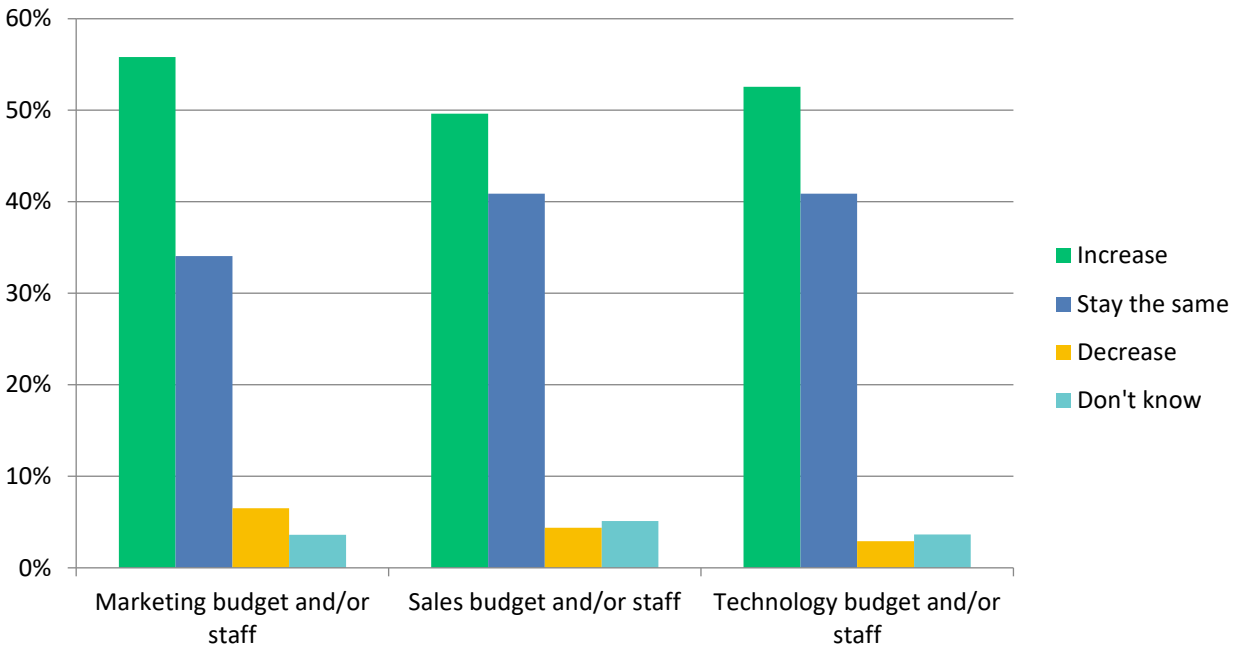
In general, which of the following criteria are most important to your clients with regard to using or renewing your recruiting services?
(Select the top 3)



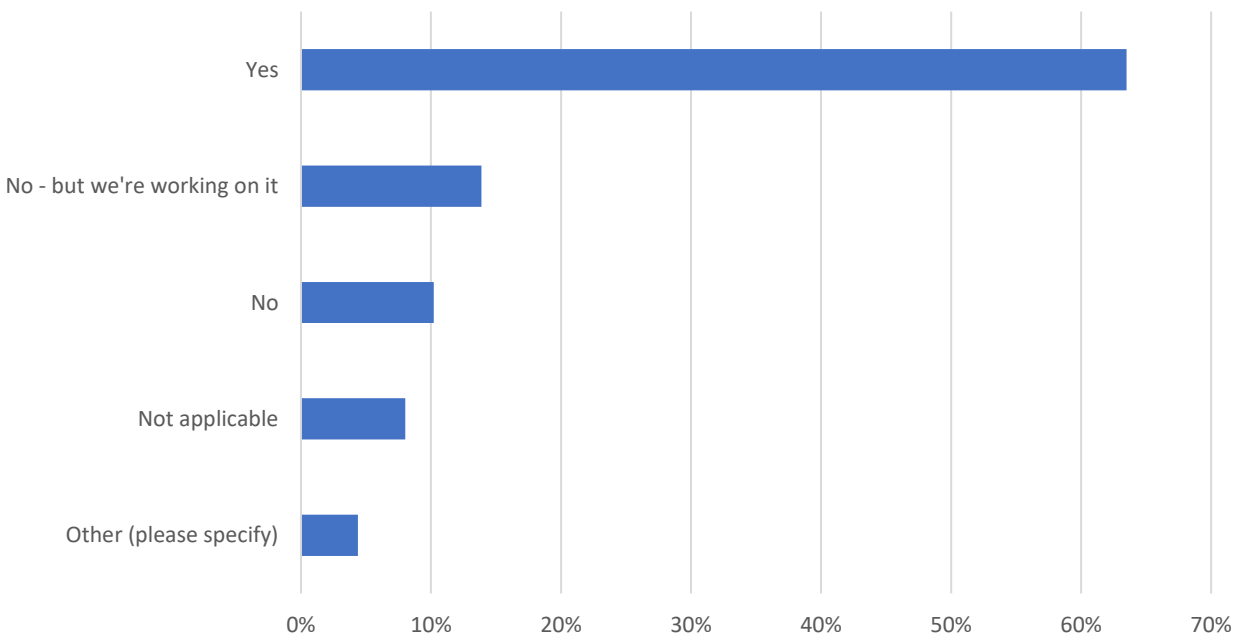
Which of the following services do you currently offer to your clients and candidates?



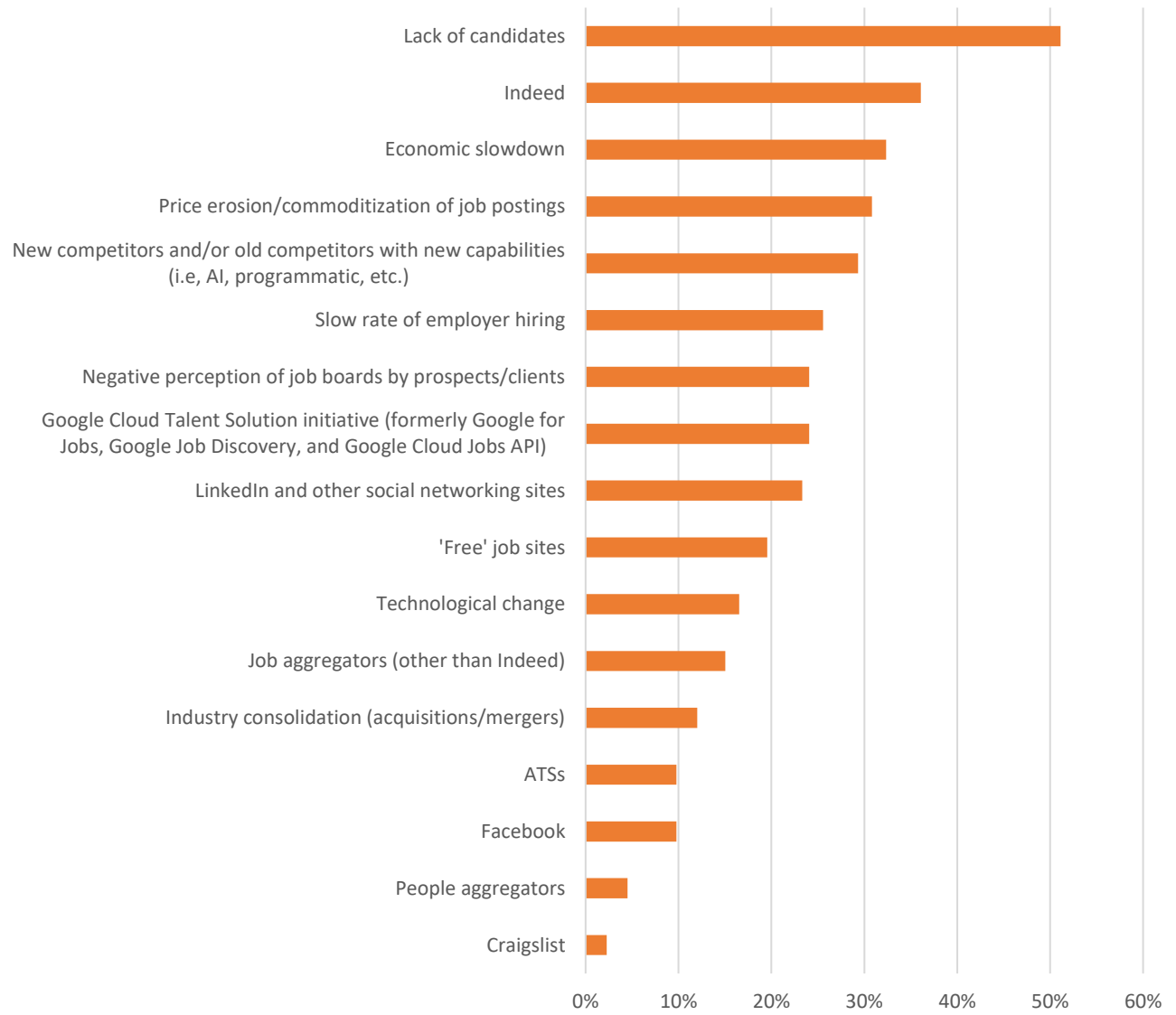
Over the next 12 months, how do you predict the following elements of your business to change?



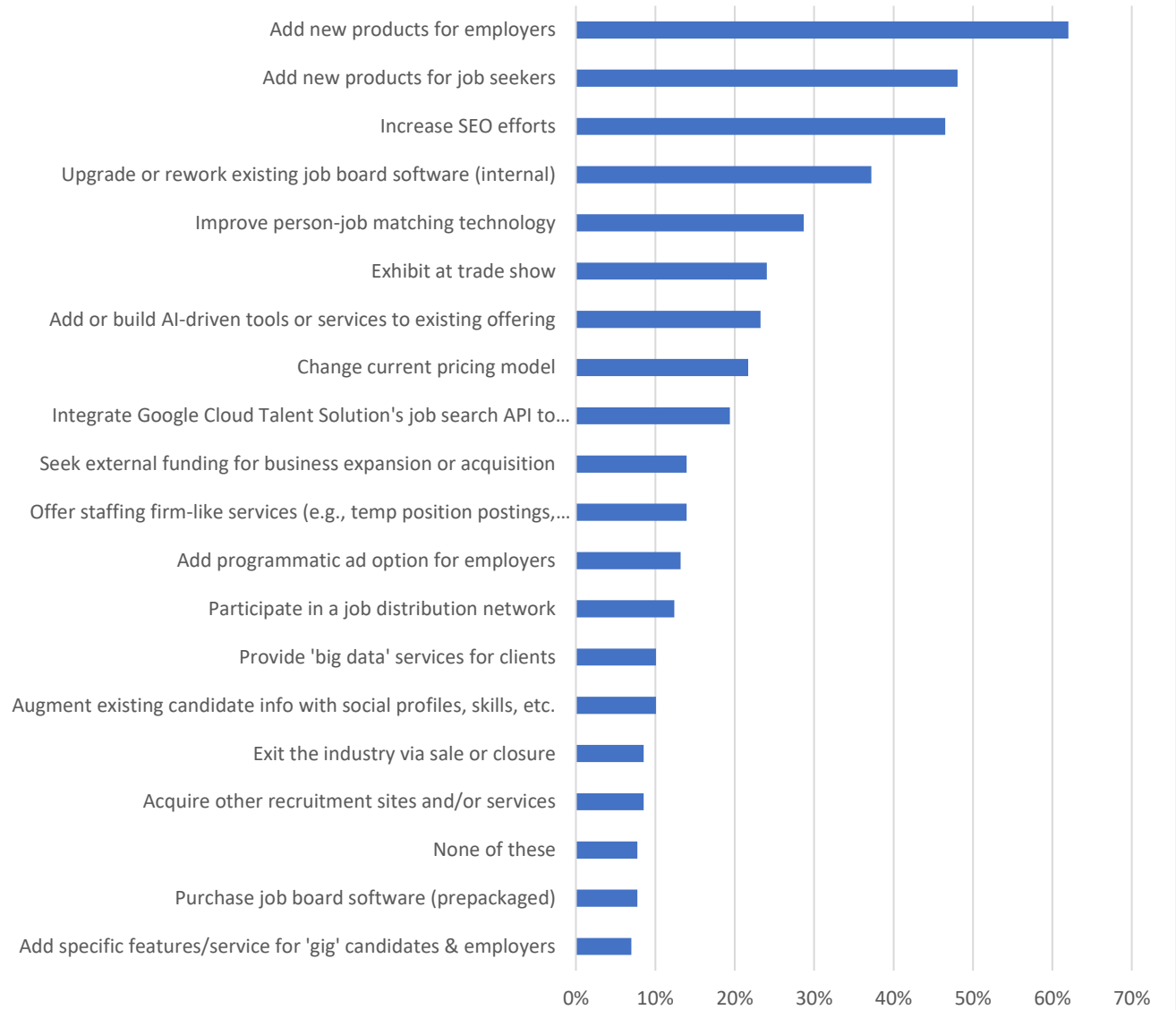
Are your job postings compliant with the Google Cloud Talent Solutions (formerly Google for Jobs) markup schema?



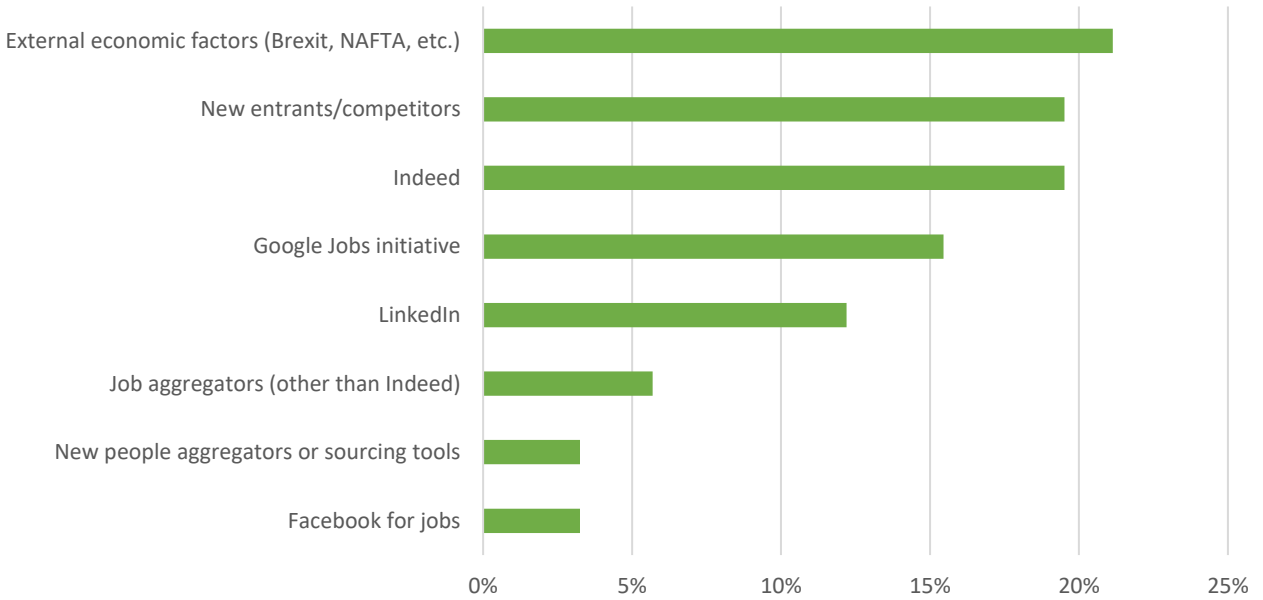
Which of the following do you see as the most significant *threats* to your business in the next 12 to 24 months? (Check all that apply)



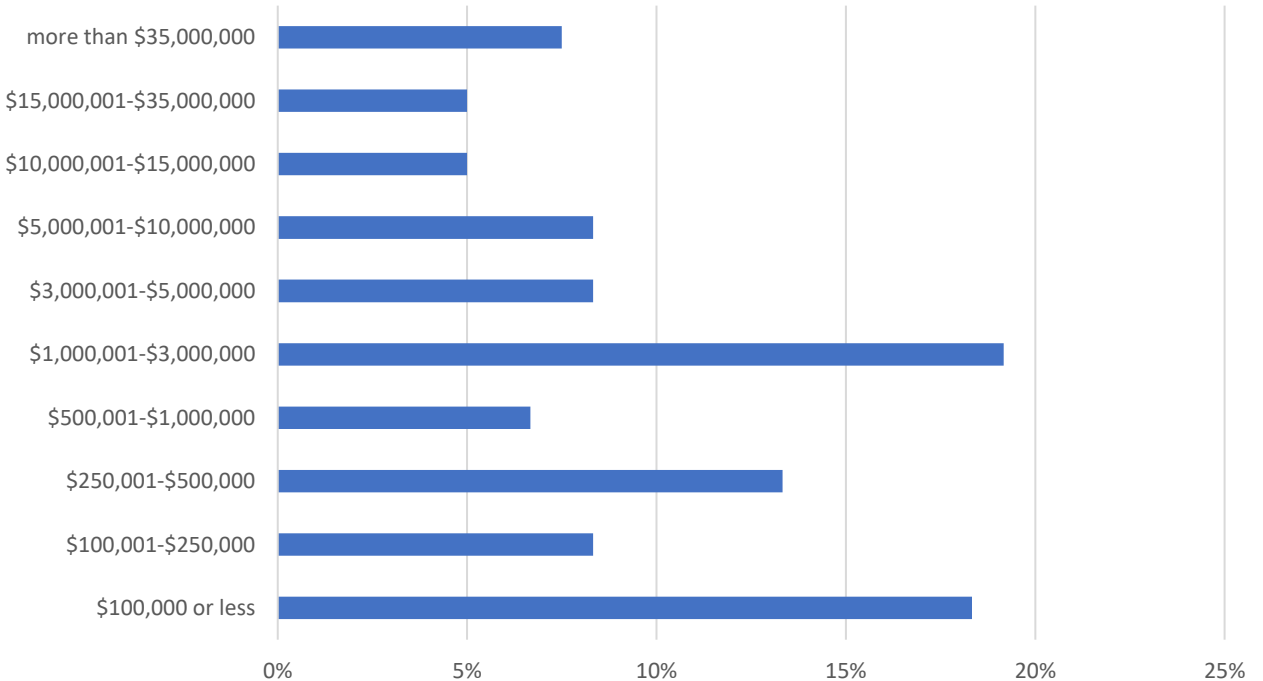
Which of the following actions are you planning in the next 12 months? (Check all that apply)



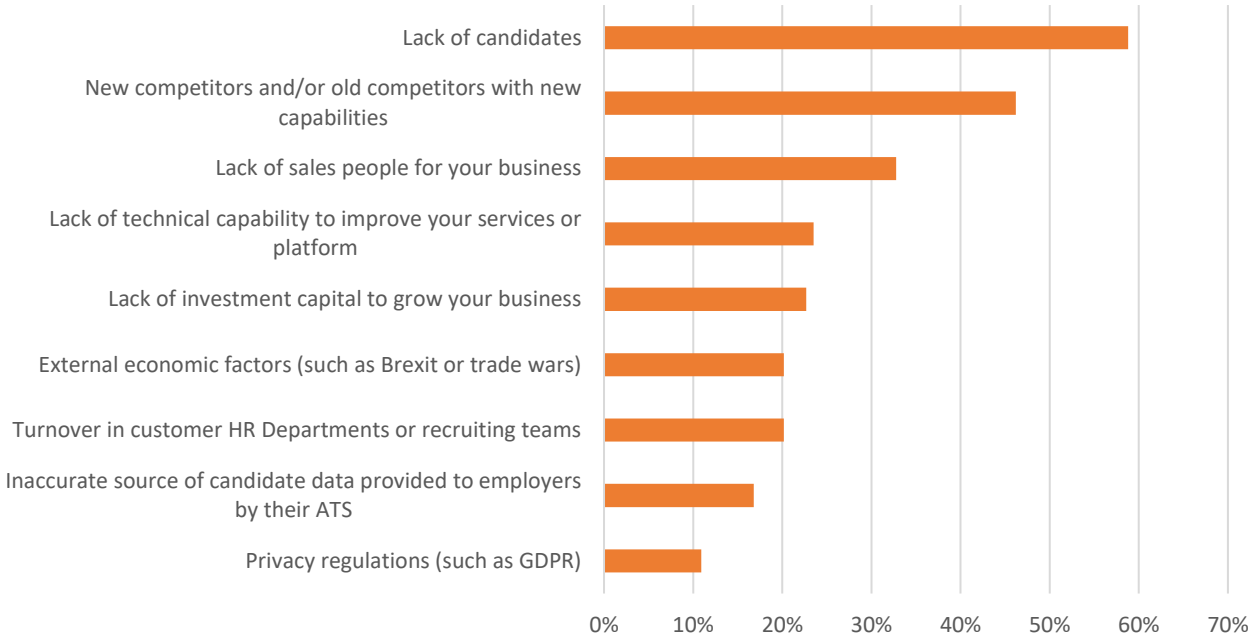
Which of the following do you see as the ***single biggest*** competitive threat to your business in the next 12 months?



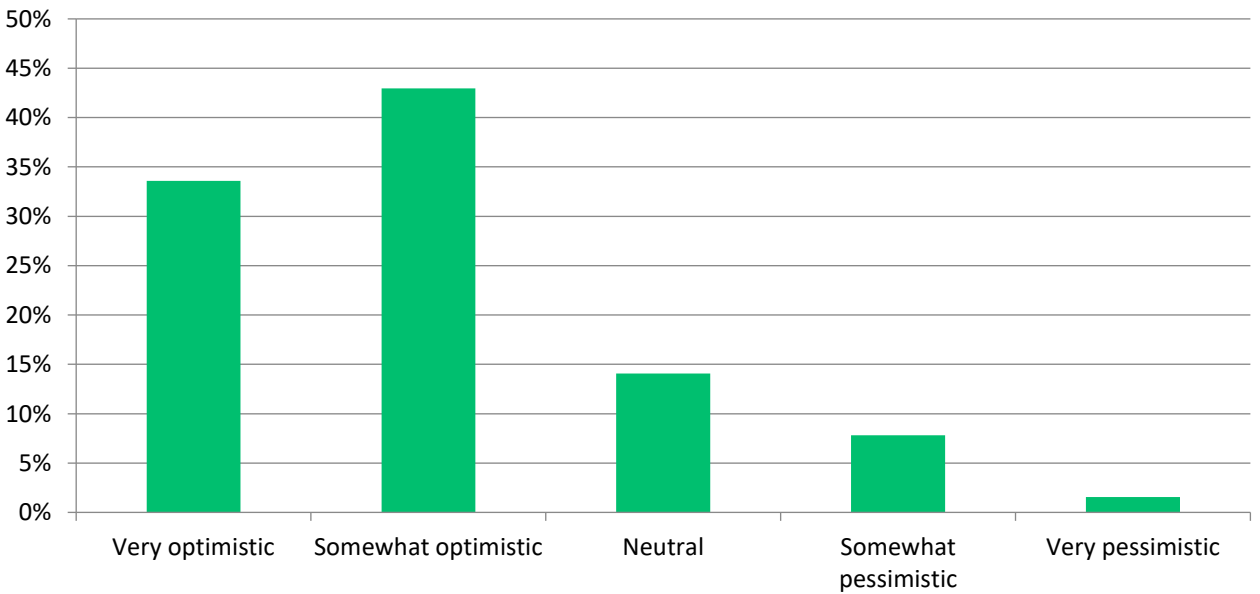
What is your best estimate of revenues for your business in the next 12 months? (in USD)

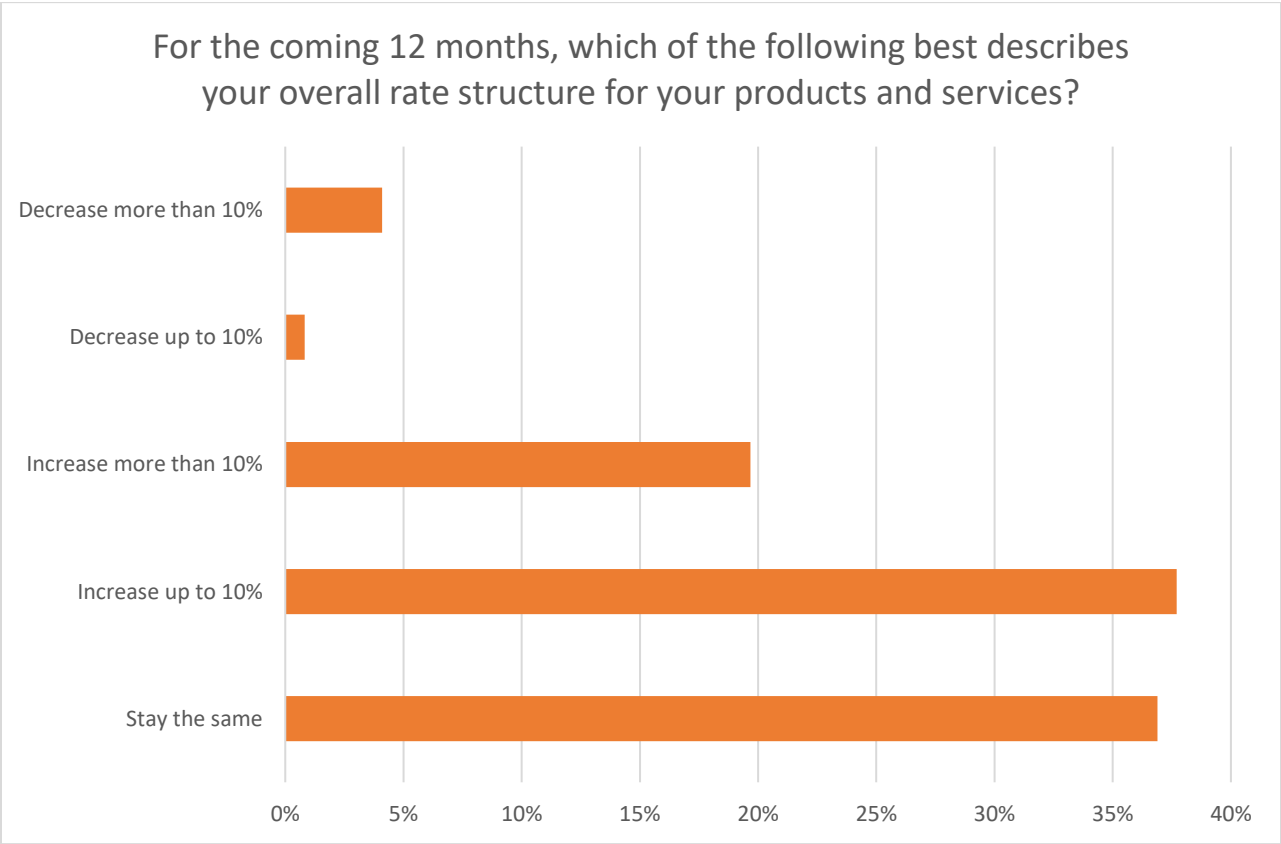
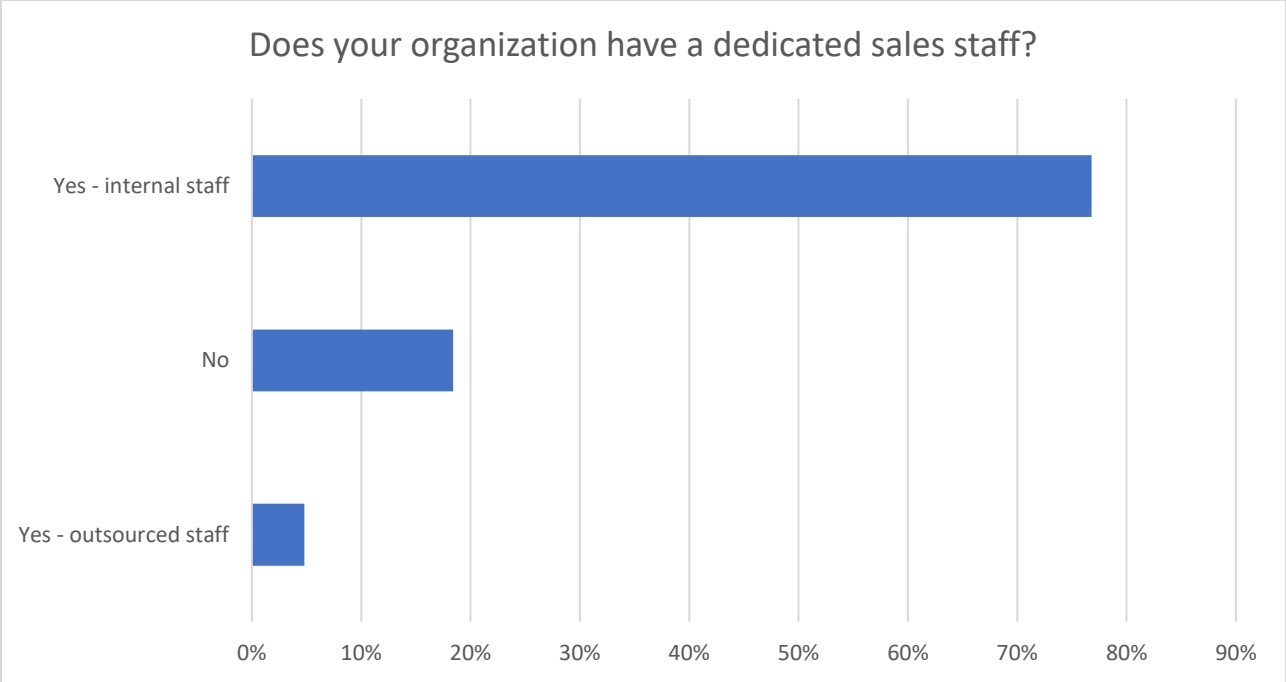


Which (if any) of the following challenges or impediments will ***significantly*** affect your organization during 2018-19? (check all that apply)

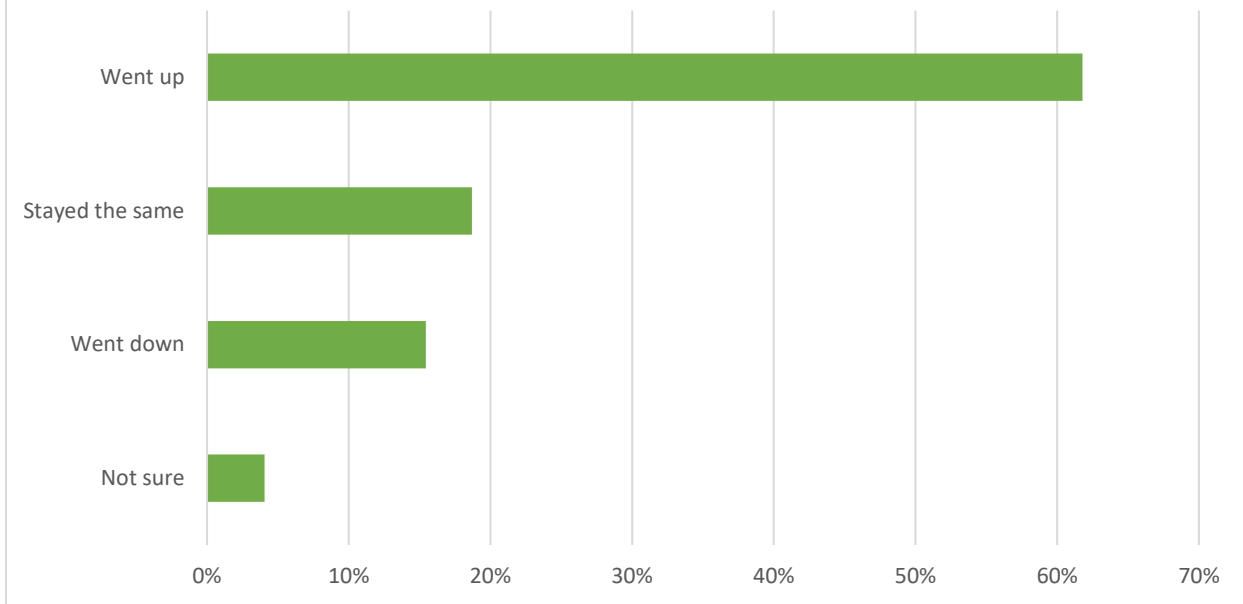


How optimistic are you about the opportunities for your organization over the next 12 months?

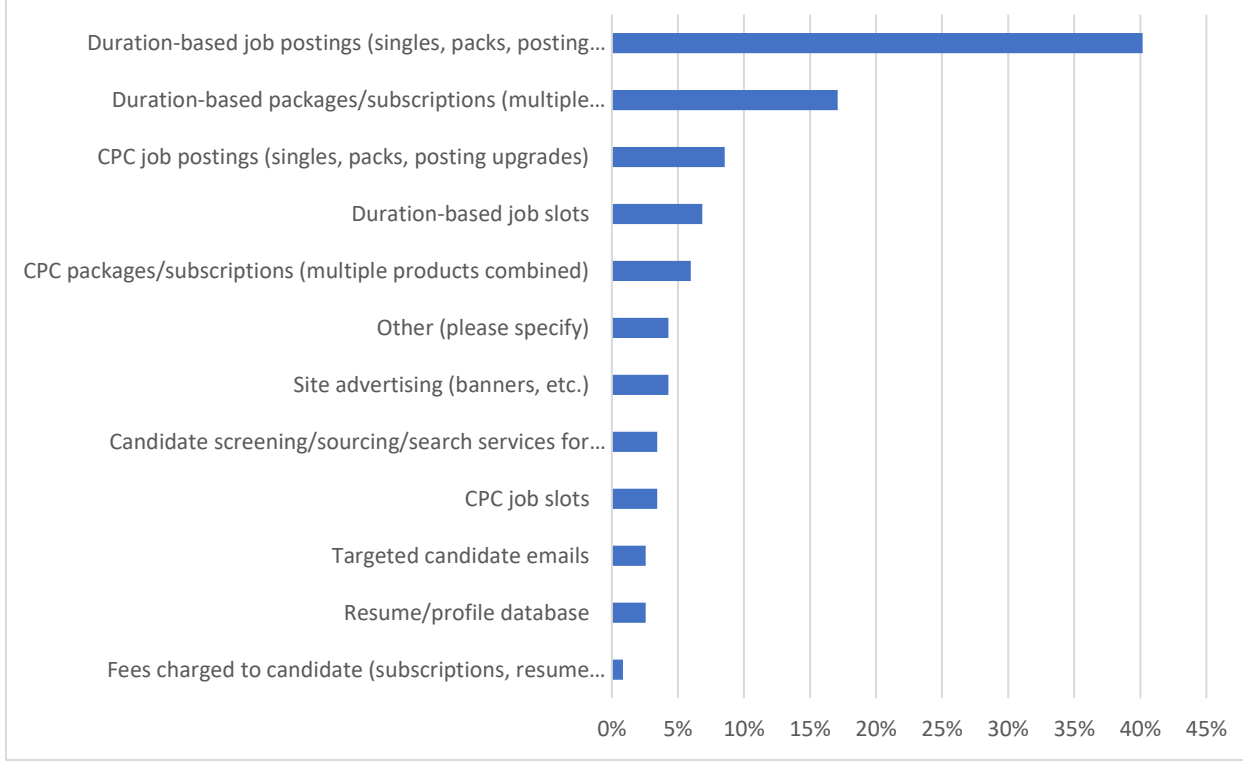




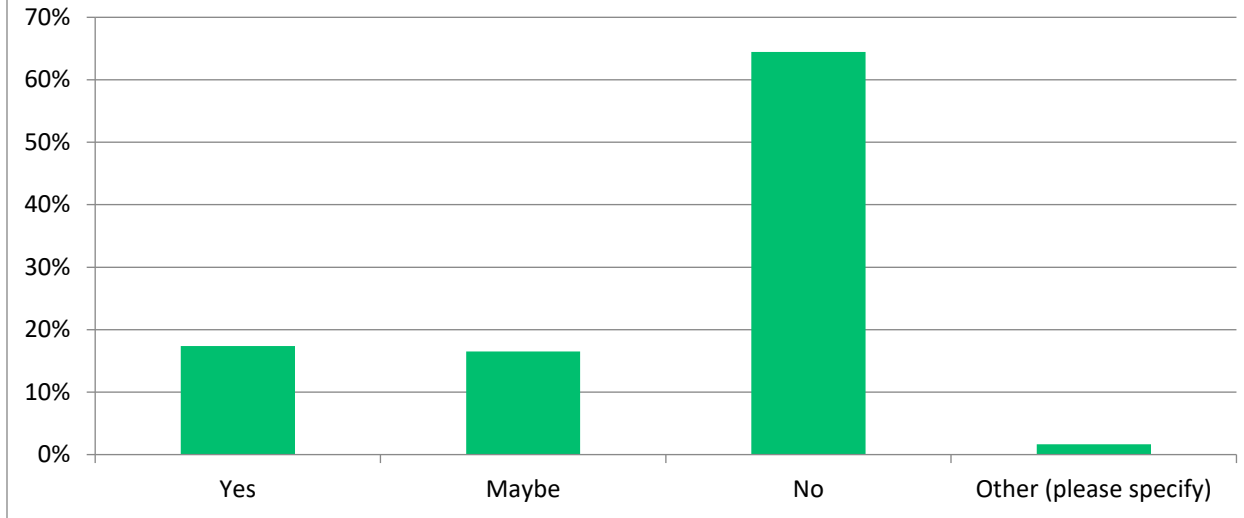
How has your total gross business revenue for the past 12 months changed?



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



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





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
- 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 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