

2019-20

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 140 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 10 minutes to complete.

The survey included questions covering:

- Perceived threats and opportunities
- Demographics
- Largest sources of revenue
- Business models
- 2019-20 business plans

Survey responses were collected September - October 2019.

Executive Summary

Here are some of the key findings from the 2019-2020 survey:

- **Quality of applicants** is the most important criteria clients use in buying job board services.
- **Economic slowdown** is seen as the most significant threat in the coming 12 months.
- **Lack of candidates** and **external economic factors** are viewed as the key factors affecting business growth in the coming year.
- **55% of respondents** saw revenue go up in the past 12 months.
- **53% of respondents** rely on duration-based postings as their primary revenue source; 24% rely on CPC offerings.
- The **most popular terms** that respondents use to describe their service are 'job board', 'recruiting site', and 'niche job site'.

Key respondent quotes:

"The effect of AI on recruitment in the near-term is way overblown. Similarly, the vast majority of small- to medium-sized companies still don't understand or care about programmatic ads...more exaggerated importance."

"Let's see what happens with Google for Jobs... Also, I see a trend towards sourcing tools."

"Google for Jobs will finally offer a paid placement or cpc service"

"Thought about selling and received an offer this year from a multinational publisher, but turned it down as price was too low. I think all niche boards operating in professional services have been hit by Indeed, LinkedIn and soon Google."

"Differentiate, differentiate, differentiate. "AI-matching" is way overhyped, although year by year it will slowly and tortuously improve. We are focusing on segmenting by demand intensity and creating products for each segment, i.e. employers will pay far more to recruit a senior key job than they will a staff job, but the product must be more effective and differentiated. Price-discrimination 101."

"Brexit-related chaos is destroying business confidence. There is no possibility of any 'miracle cure' as we stagger towards economic decline and the break up of the UK."

"Core job board is under pressure, but optimistic about new offerings like ATS, training and staffing services."

"Mark my words...if you aren't a niche job board, you will be extinct within 5 years. Only niche sites will stay somewhat relevant, but technology will replace our overall industry, unless you can stay relevant and do things out of the box and different from everyone else."

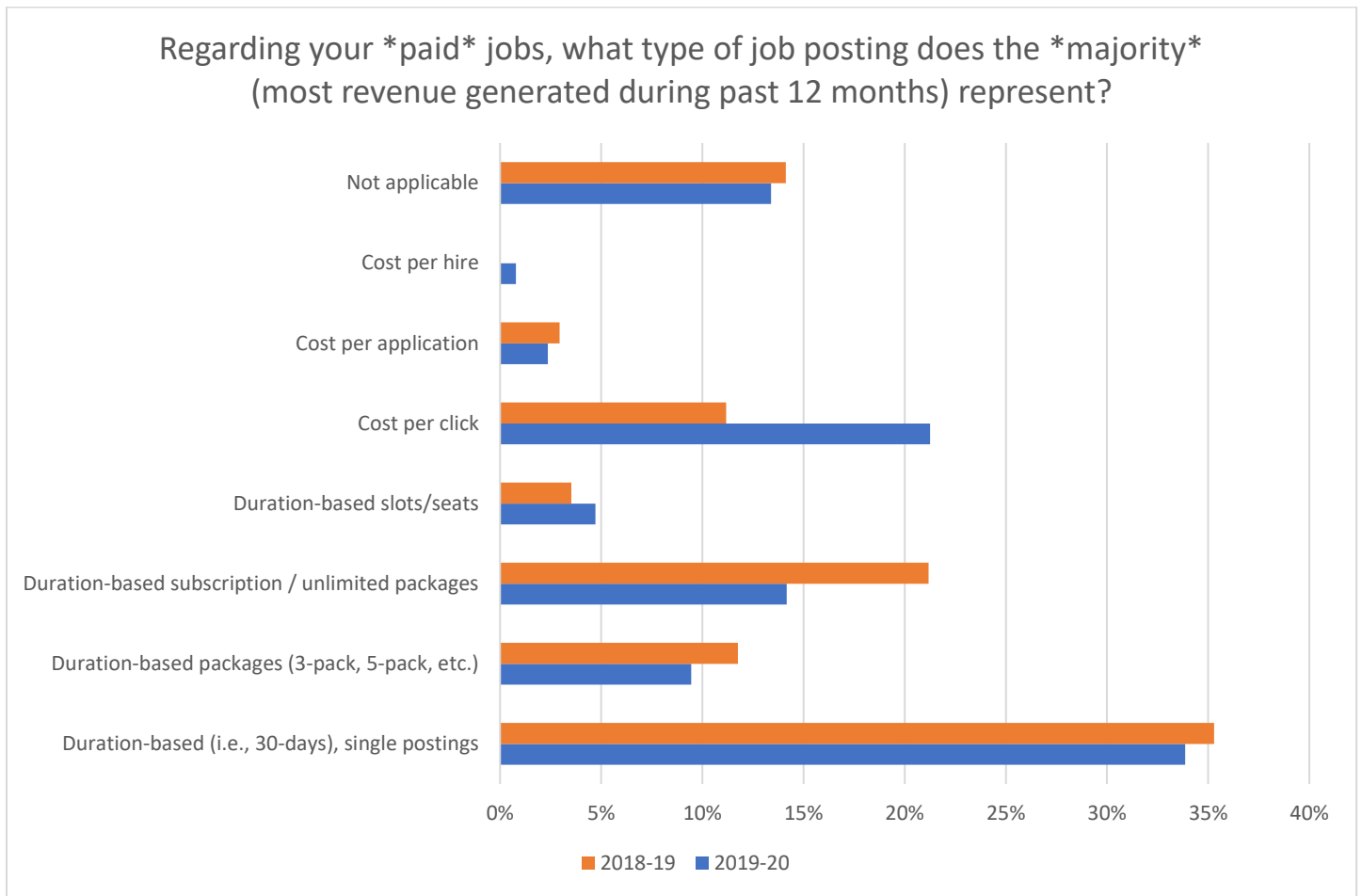
"Indeed have become a virtual monopoly for the direct sales industry in the UK, but are now blocking industry access to candidates via their Quality control team / Algorithms."

"I feel that within our industry, there will always be a need. But, without the proper funding or money to work with, building the proper solution that captivates the industry is a long haul."

"Historically low unemployment and record # of job openings = competitive recruitment marketing landscape. Threat of economic downturn tempers expectations for 2020."

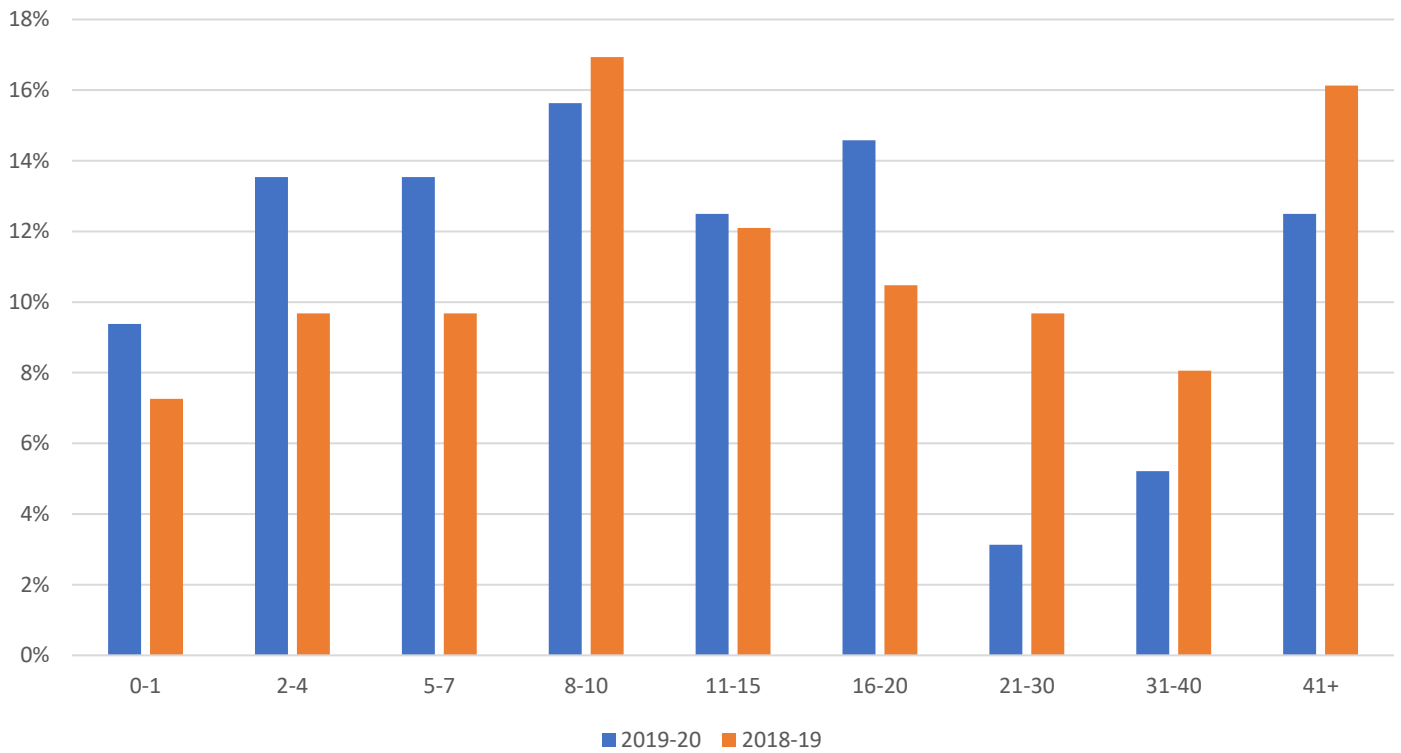
Comparing 2018-19 Survey to 2019-20 Survey results:

For the first time in a number of years, responses to some of the key questions changed from last year's survey to this year's. Below are some of those answers:



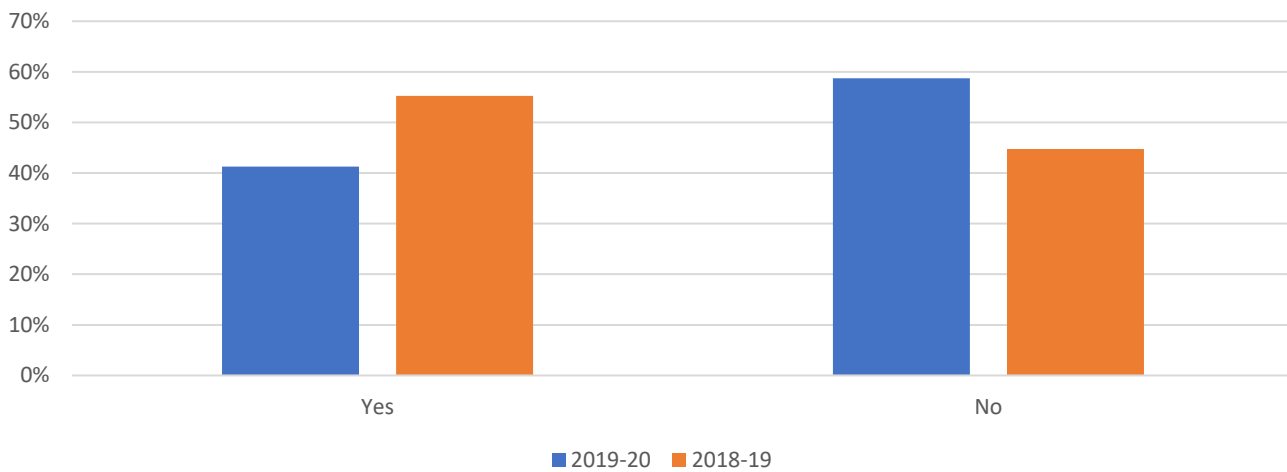
Note the **drop in subscriptions for duration based** from last year's survey, and the **increase in CPC**.

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



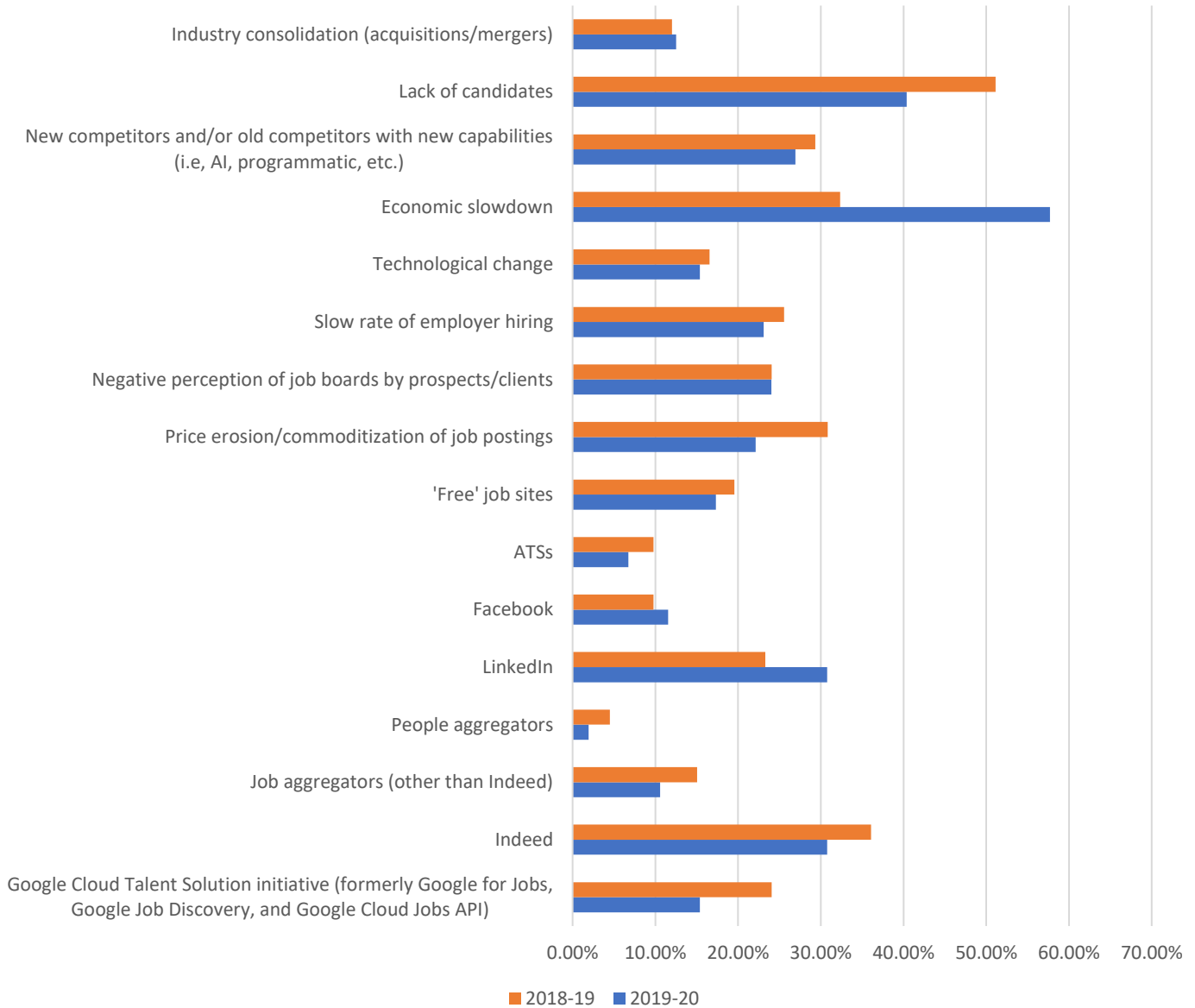
Overall the trend seems to be toward **lower levels of application clicks** from last year to this year.

Do you currently use an aggregator?



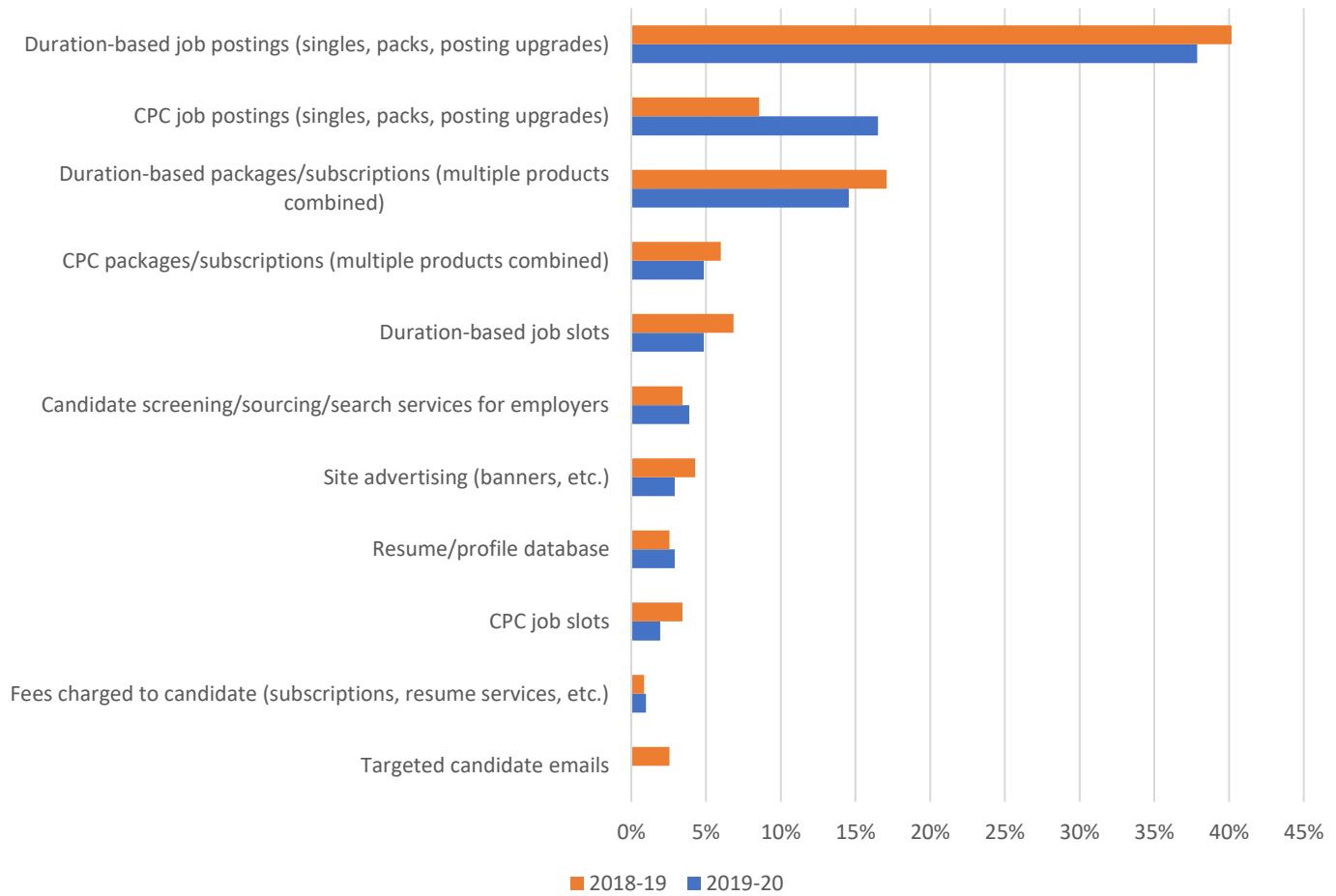
Note the **drop in aggregator usage** by this year's respondents compared to last year.

Which of the following do you see as the most significant *threats* to your business in the next 12 to 24 months?



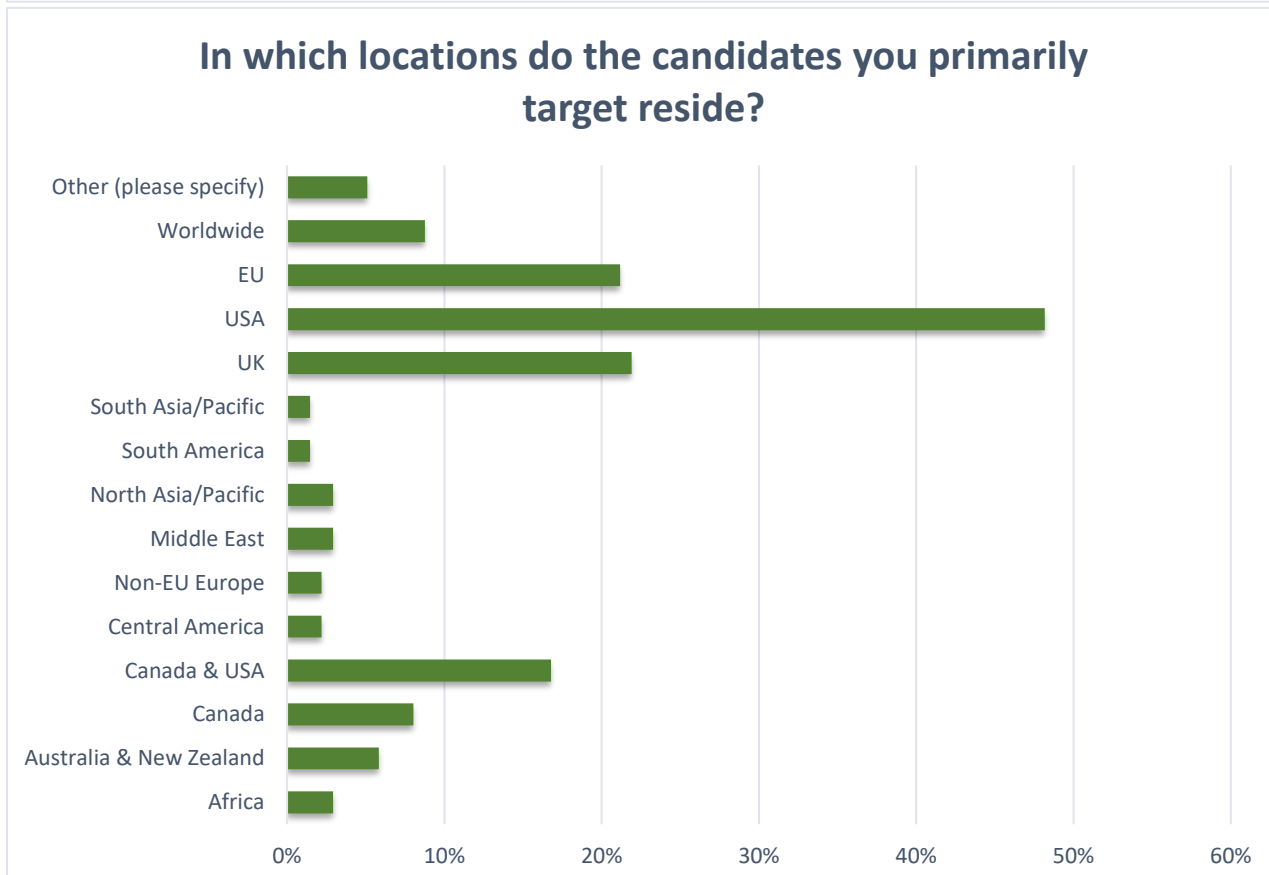
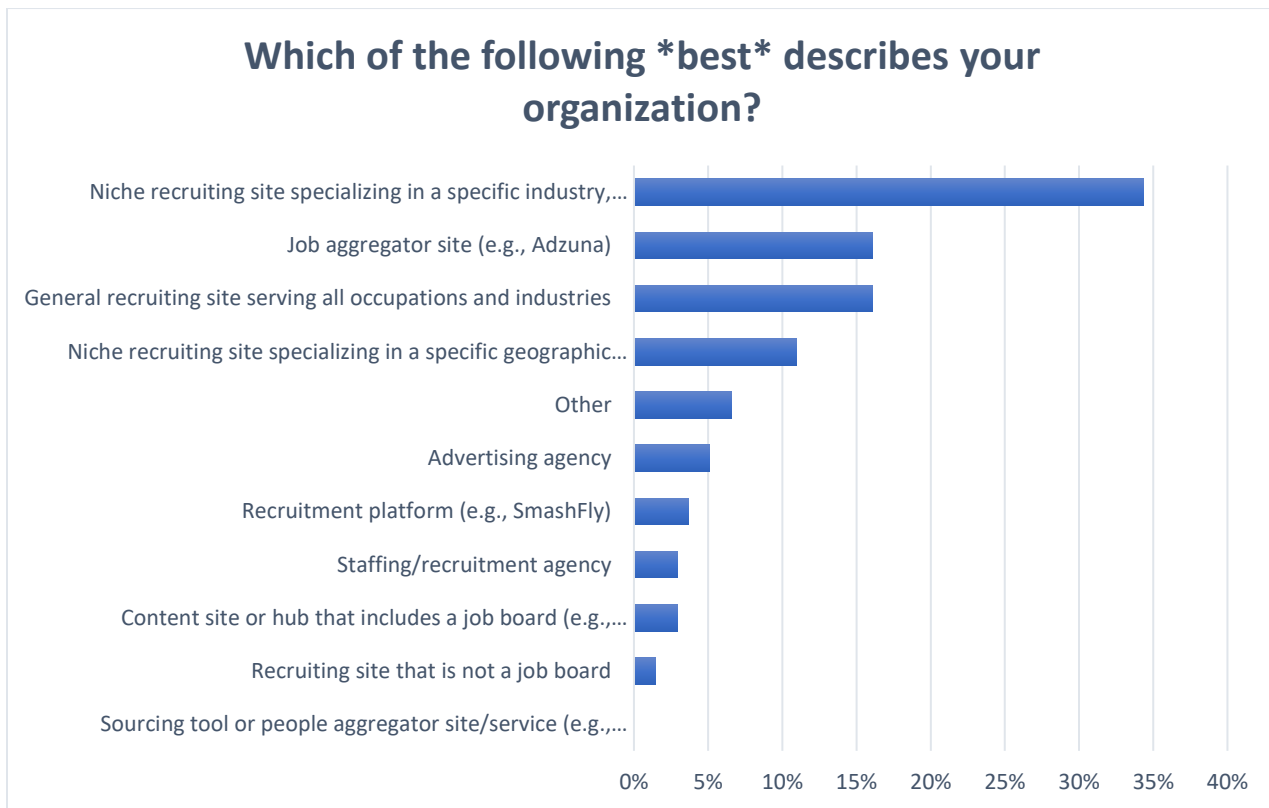
Respondents are much more worried about an **economic slowdown** and **LinkedIn** as possible threats this year.

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

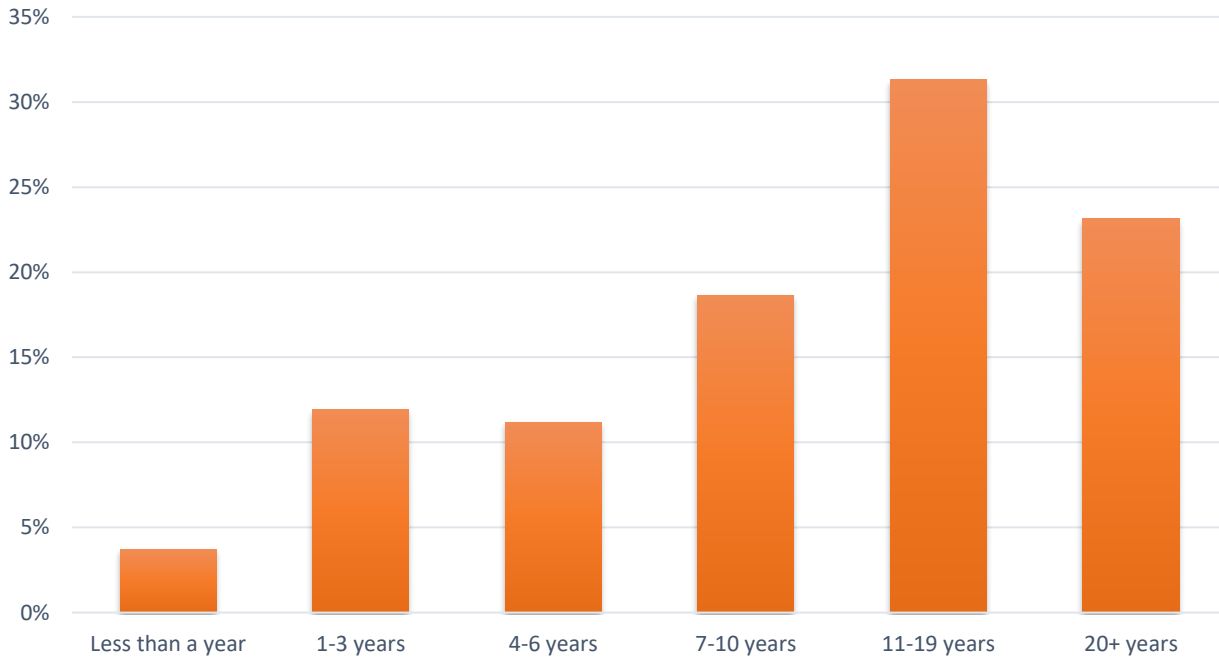


Note the **rise in CPC** as a source of revenue, and a drop in duration-based postings (both in singles, packs, packages, and subscriptions).

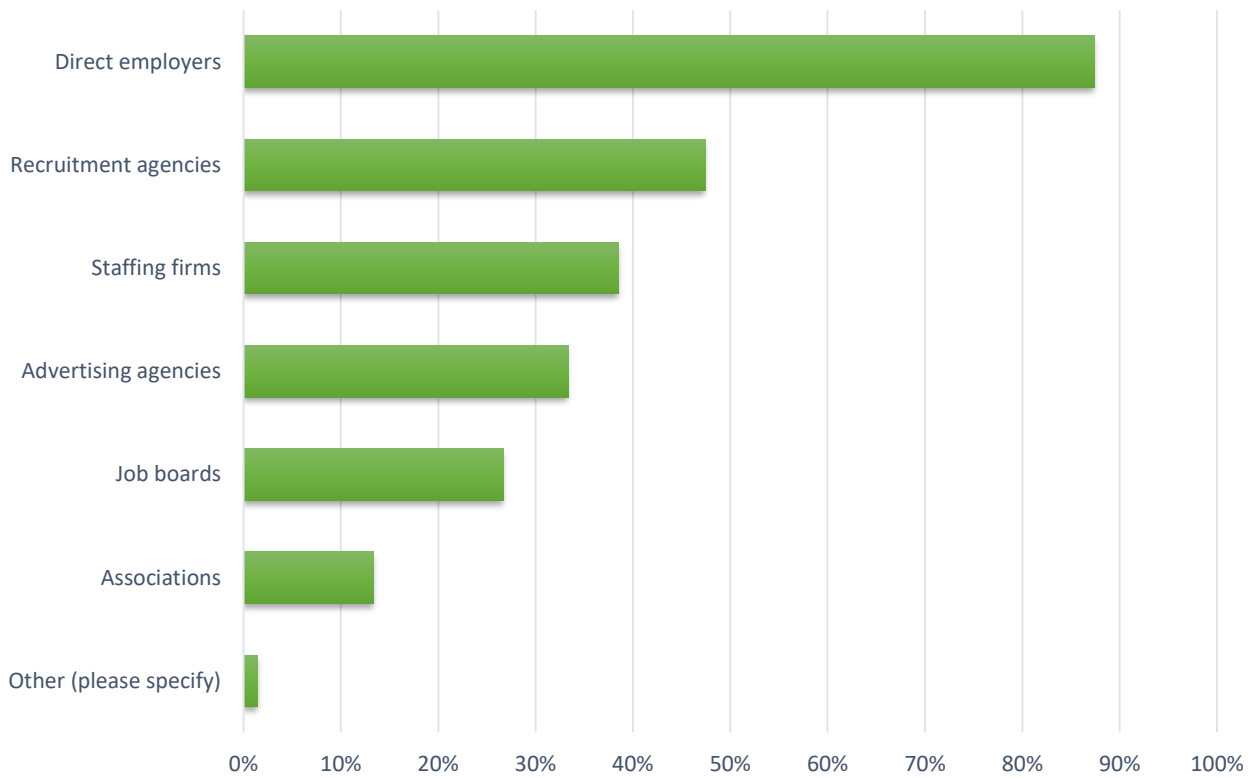
The Complete Survey Results:



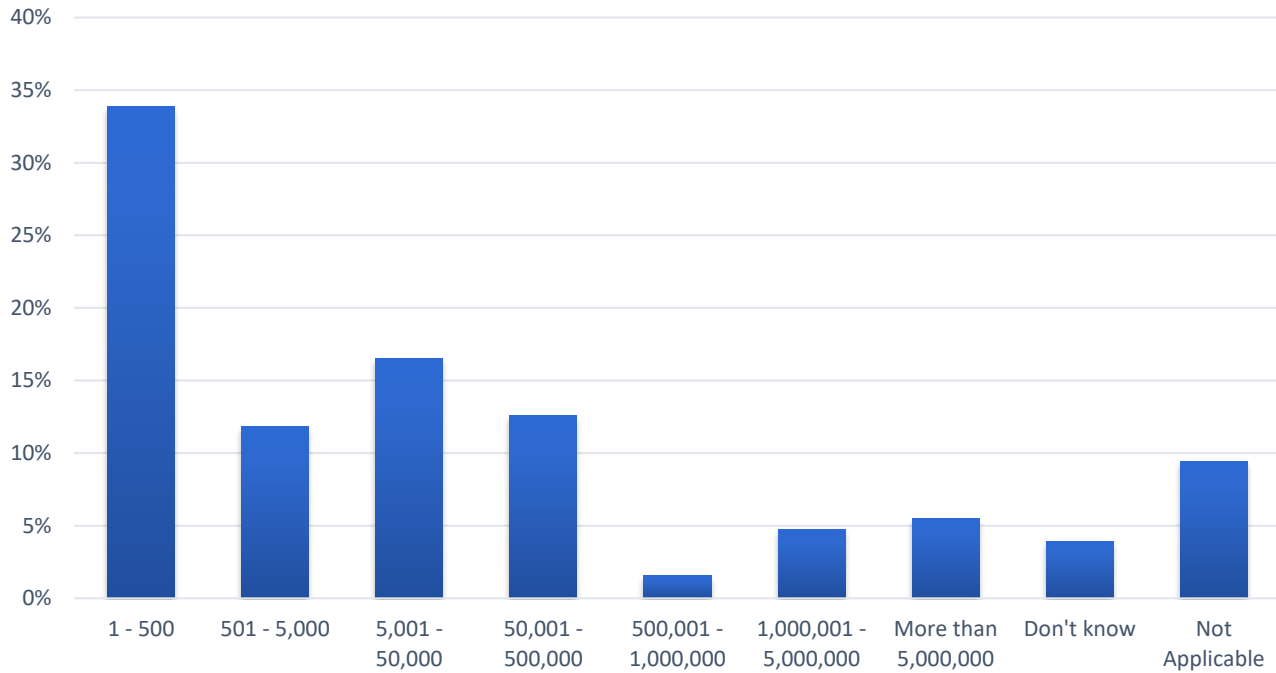
How long has your site or service been operating?



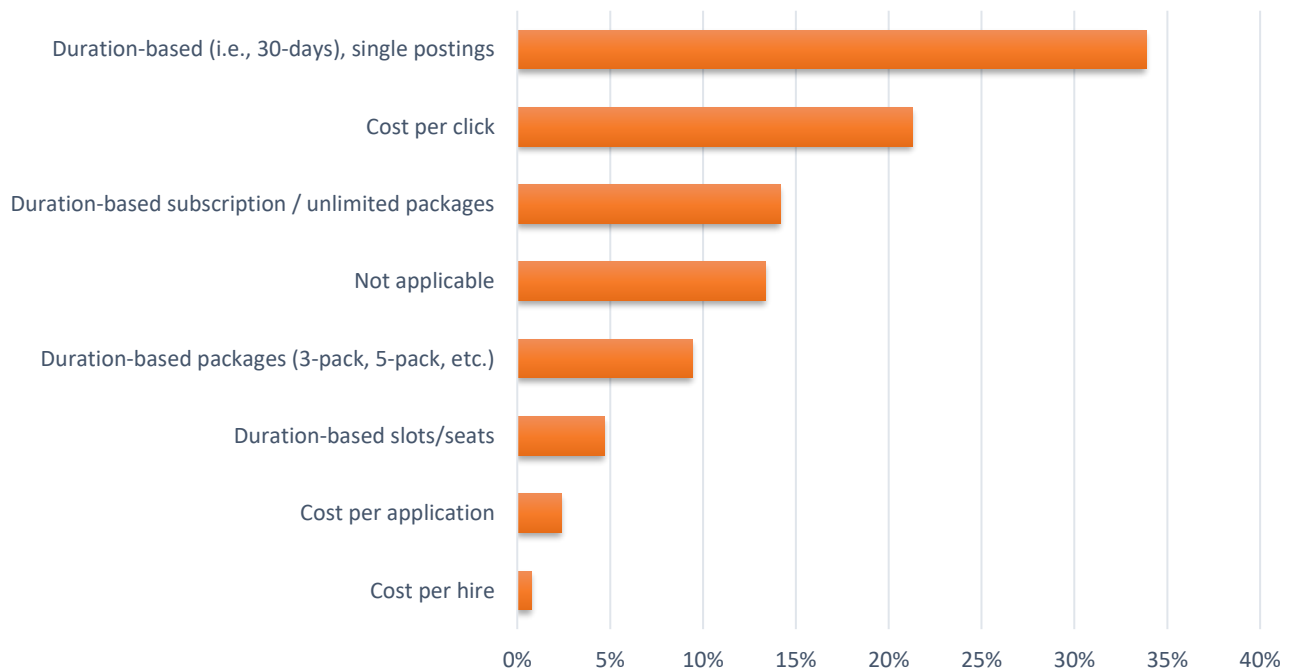
Which of the following types of clients do your business primarily target? (Check all that apply)



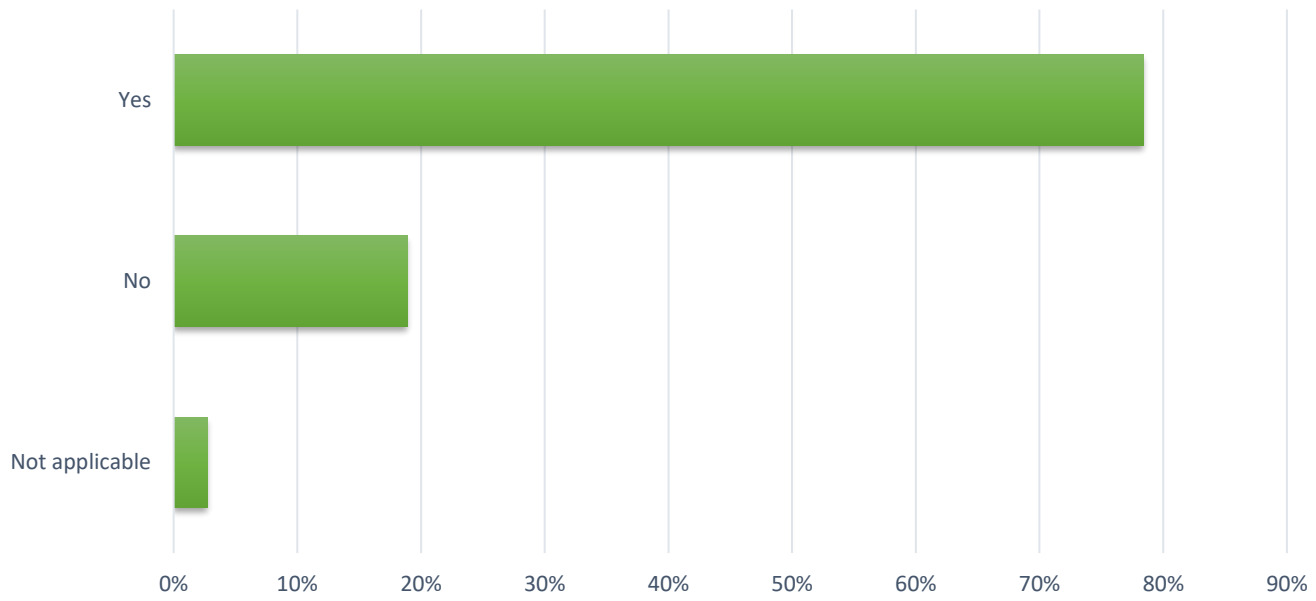
On average, how many new *paid* jobs (pay per post, pay for performance, or both) are posted on your site or service each month?



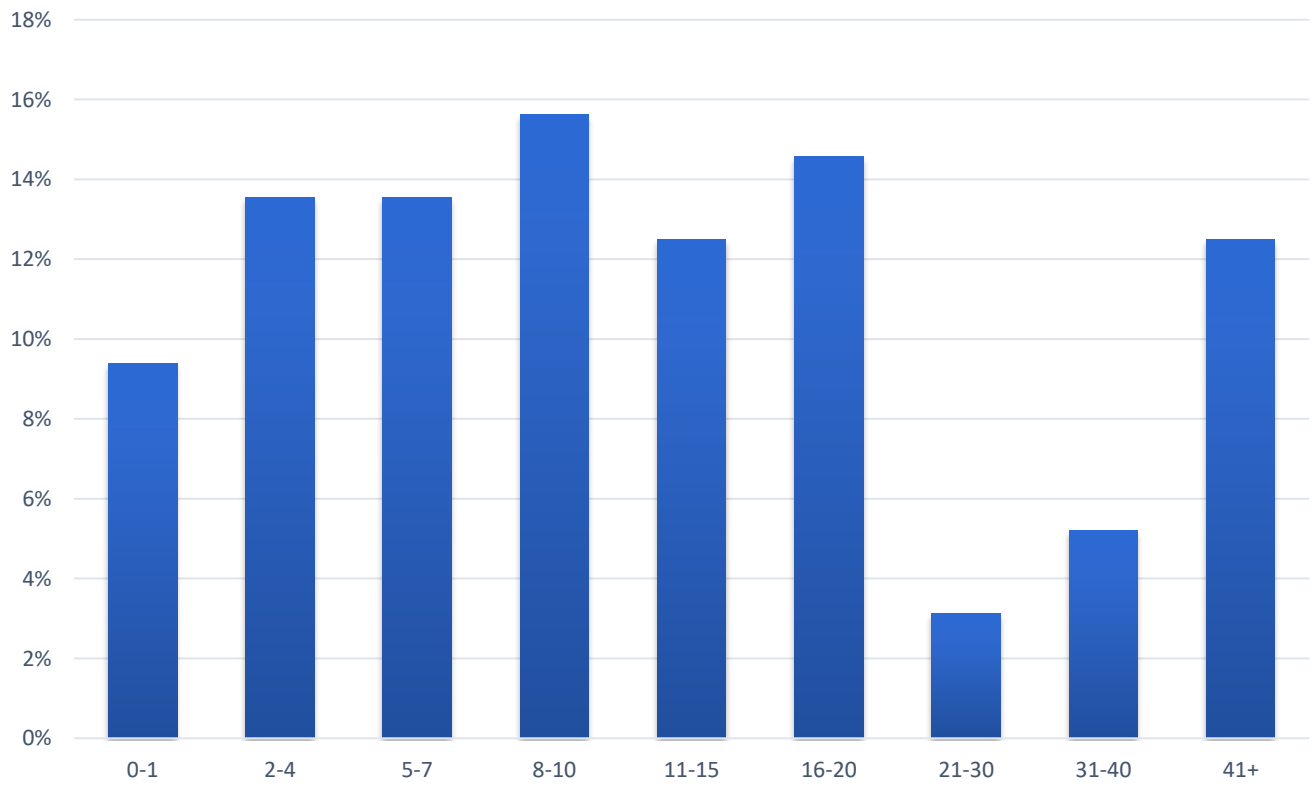
Regarding your *paid* jobs, what type of job posting does the *majority* (most revenue generated during past 12 months) represent?



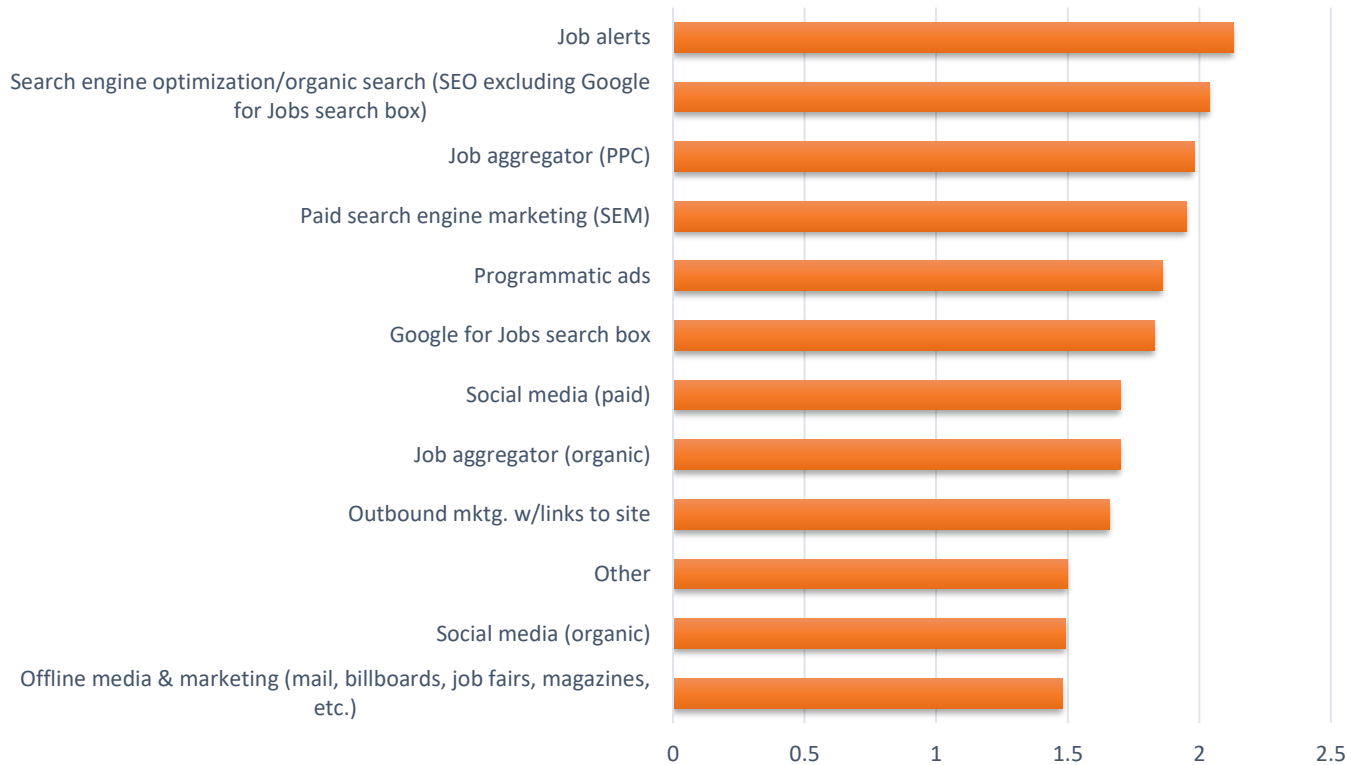
Do you track the number of application clicks for each posting on your site or service?



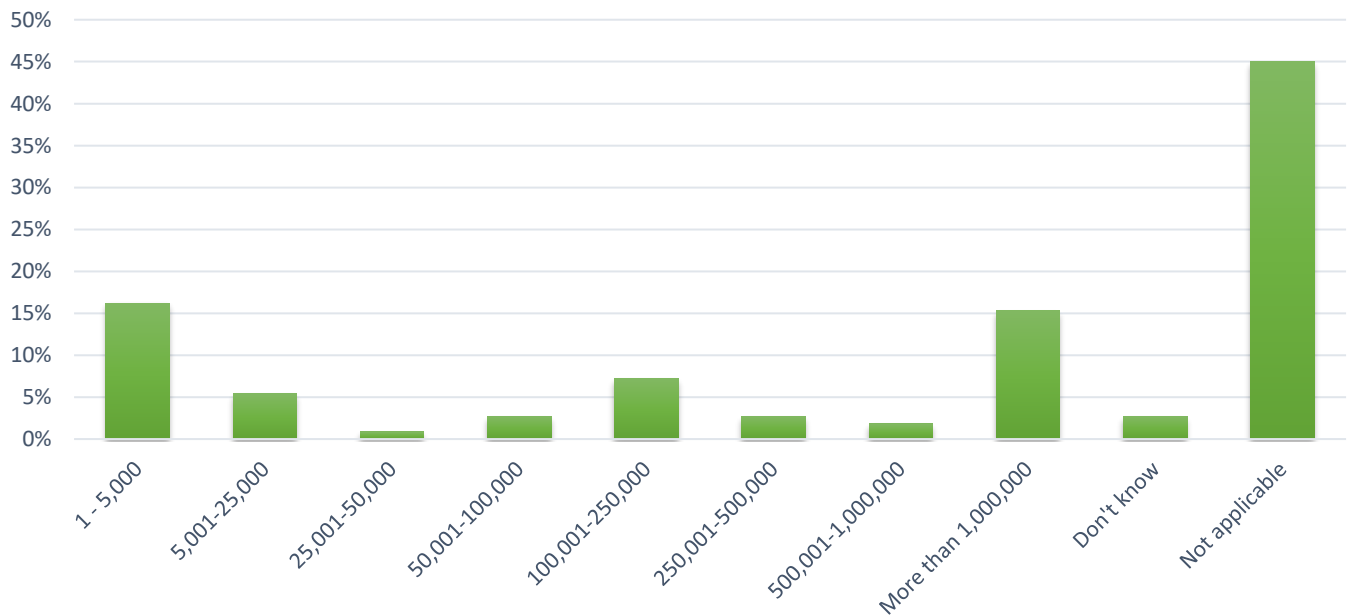
On average during the last 12 months, how many application clicks were made for the typical job posting over a 30-day period?



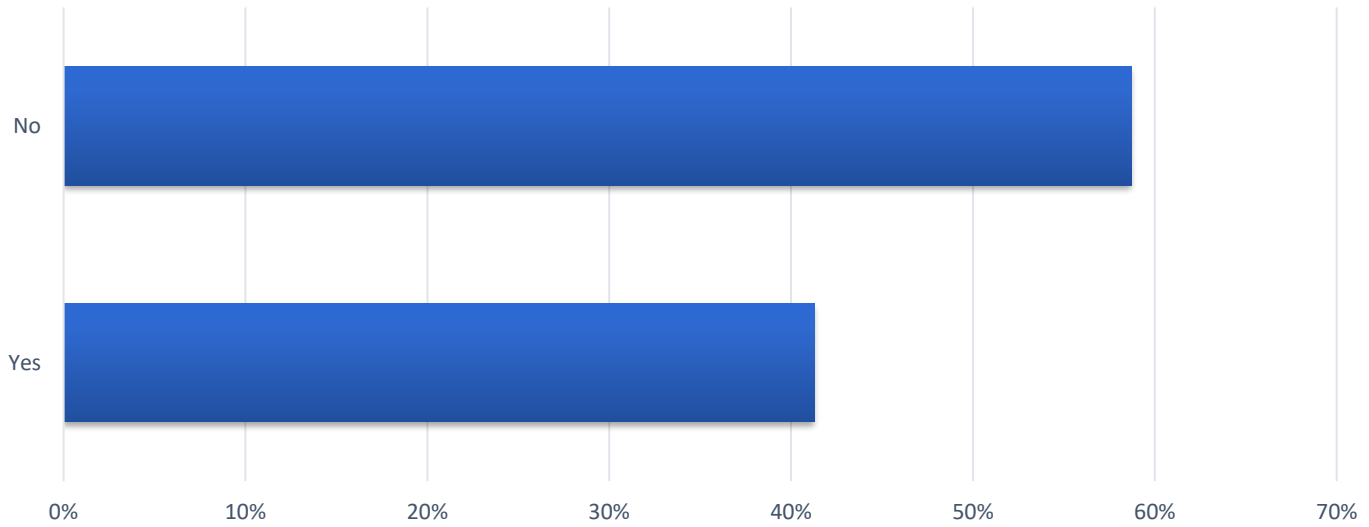
How would you rate the following sources of traffic to your site, based on the *volume and quality* of traffic generated?



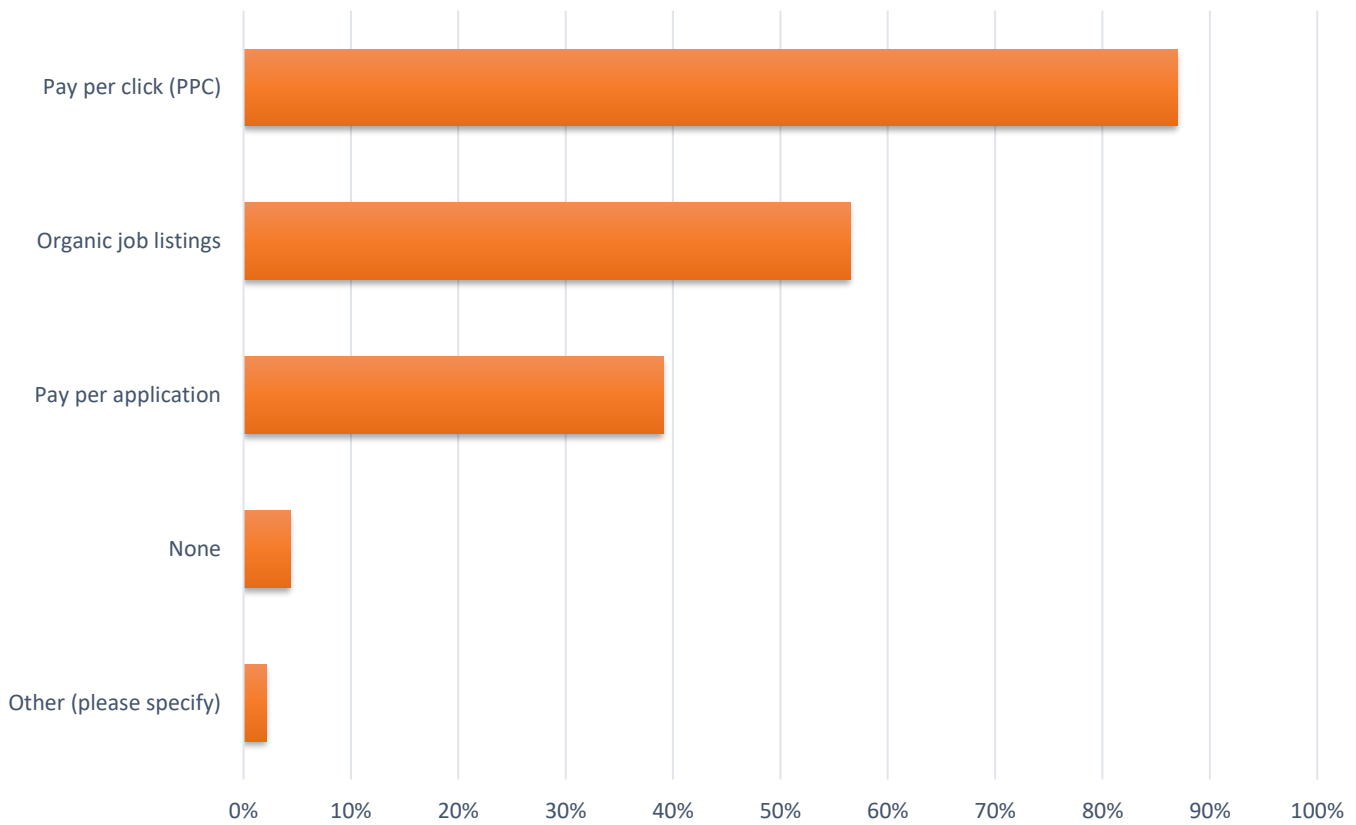
If your service offers a resume or candidate profile database that is accessible by employers, how many resumes or profiles are currently stored in the database?



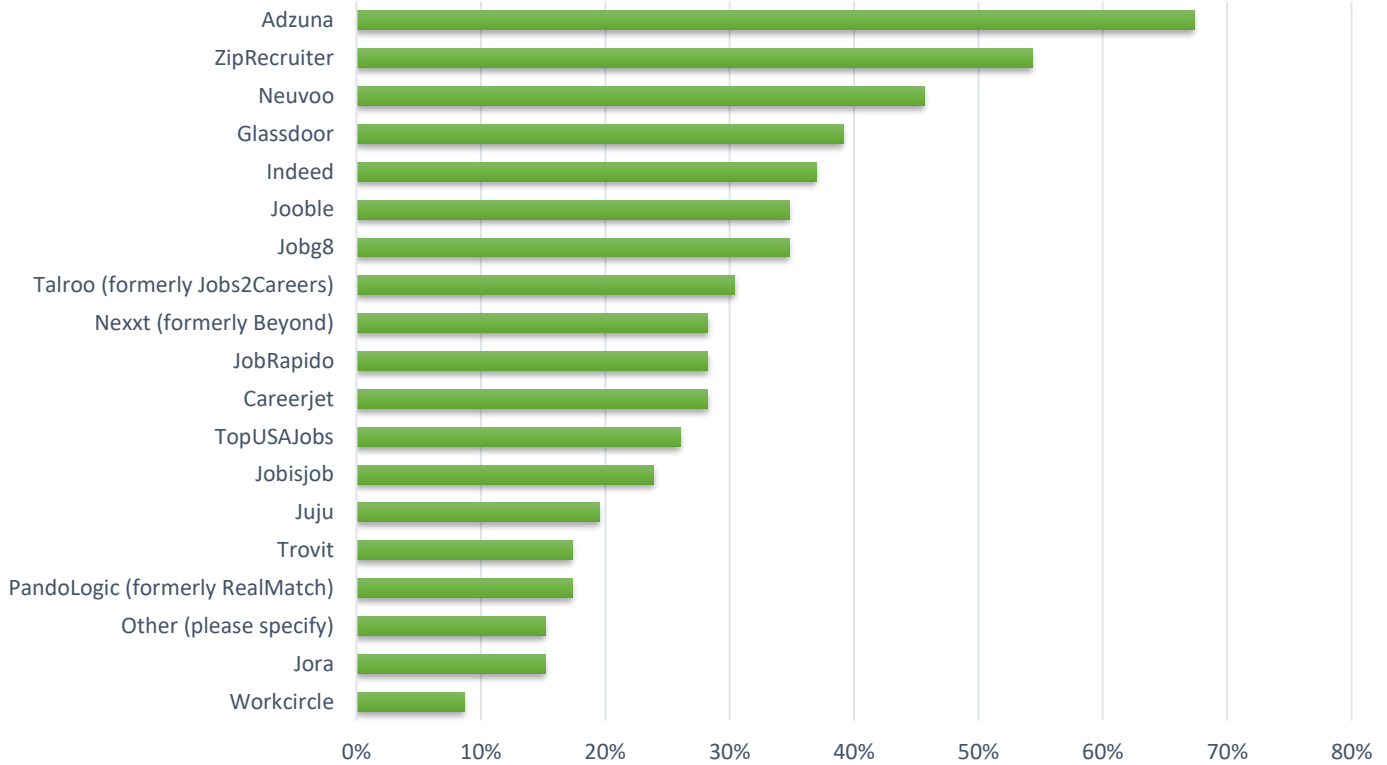
Do you currently use an aggregator?



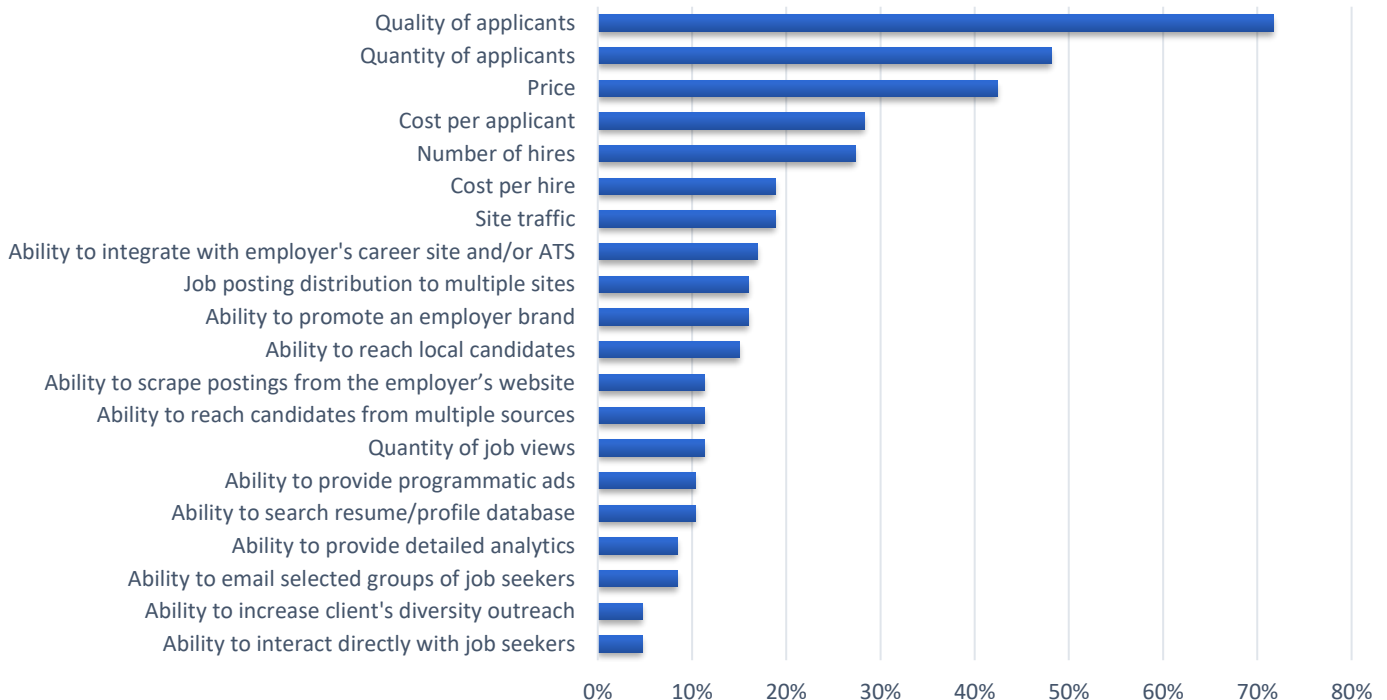
Which of the following aggregator services do you use to increase your traffic?



Which of the following aggregators do you use?



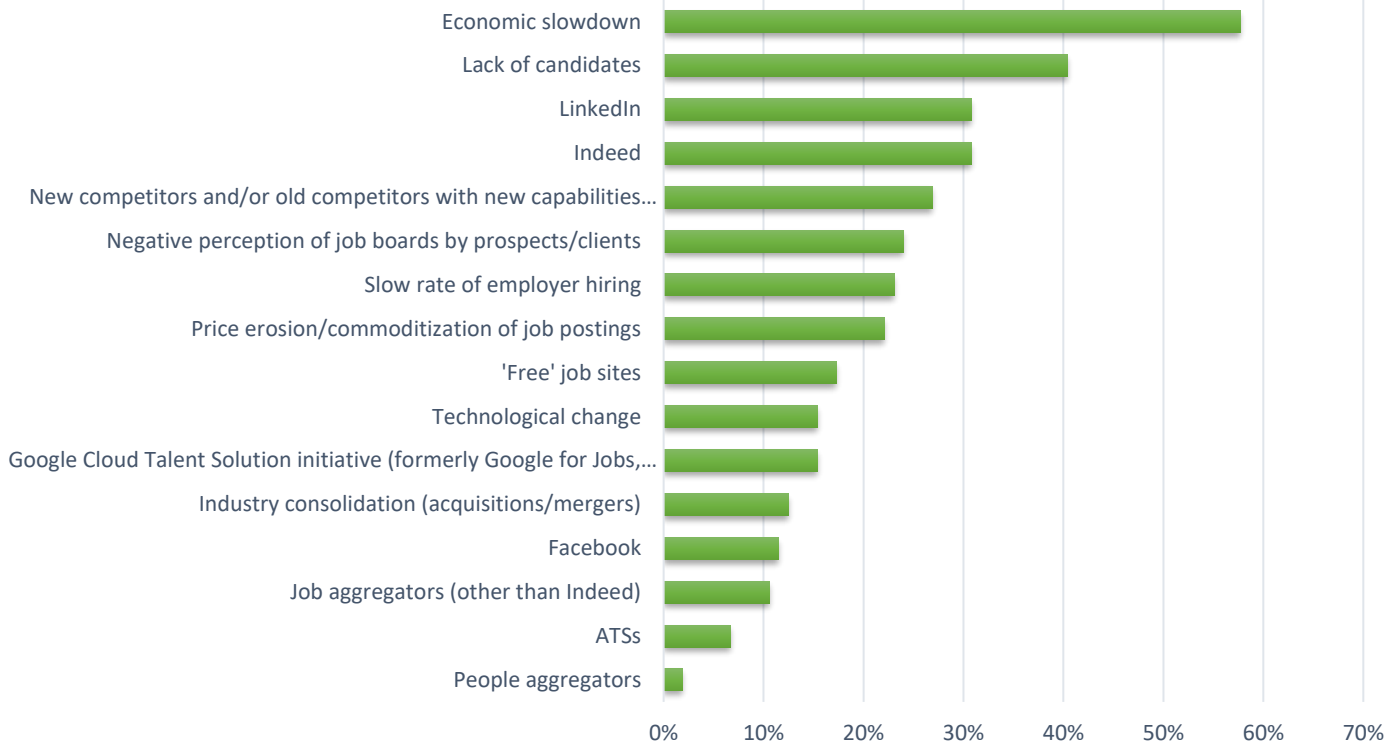
In general, which of the following criteria are most important to your clients with regard to using or renewing your recruiting services?



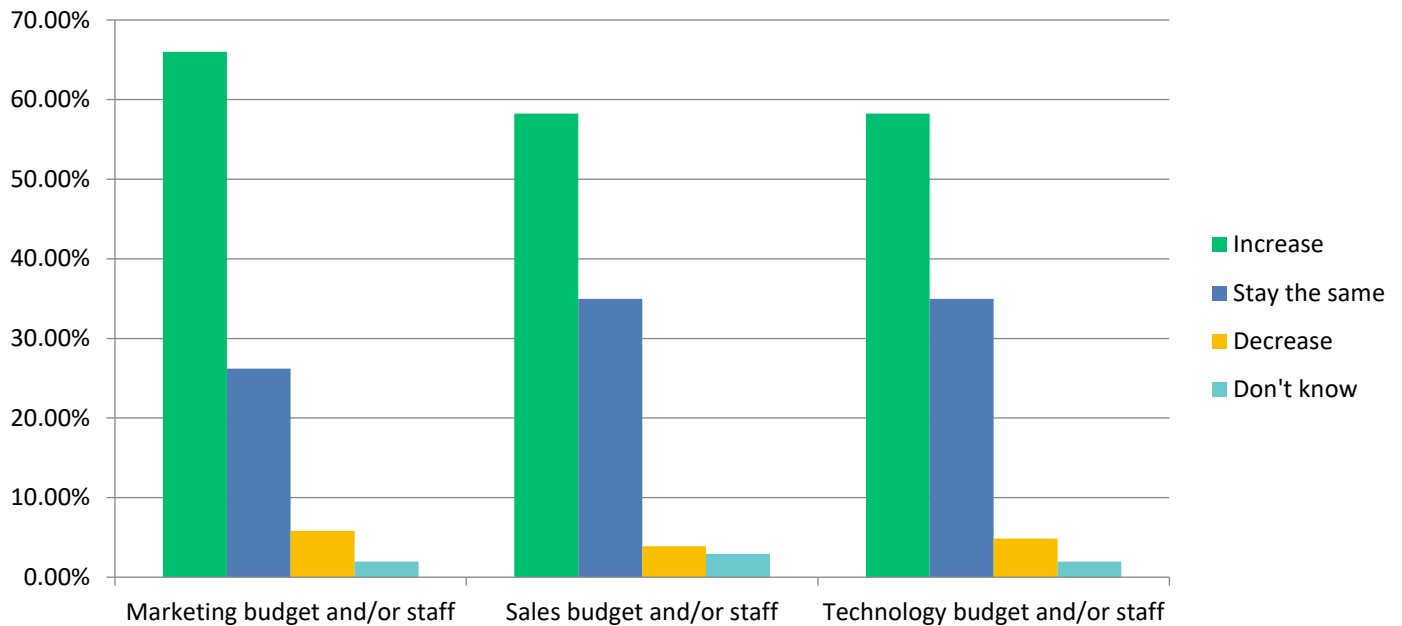
Which of the following services do you currently offer to your clients and candidates?



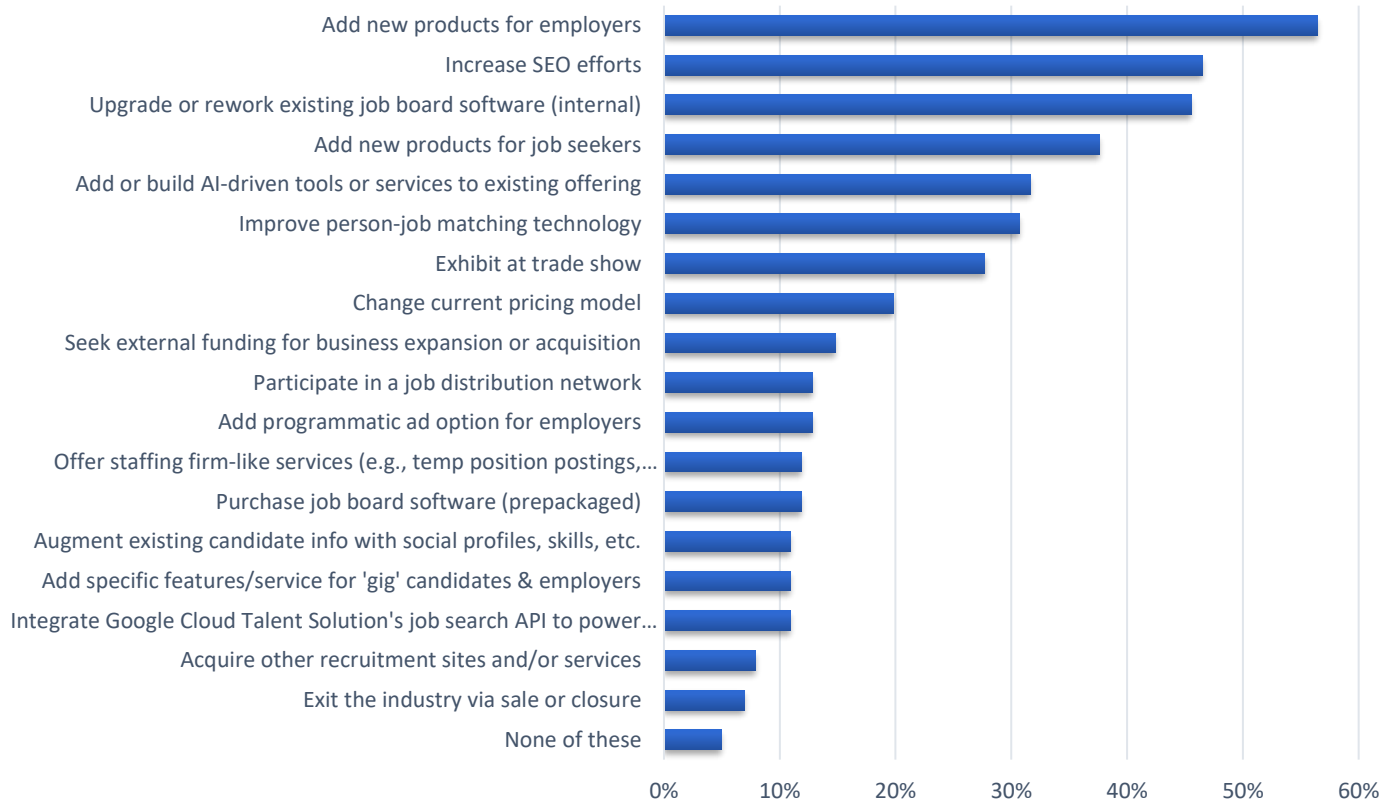
Which of the following do you see as the most significant *threats* to your business in the next 12 to 24 months?



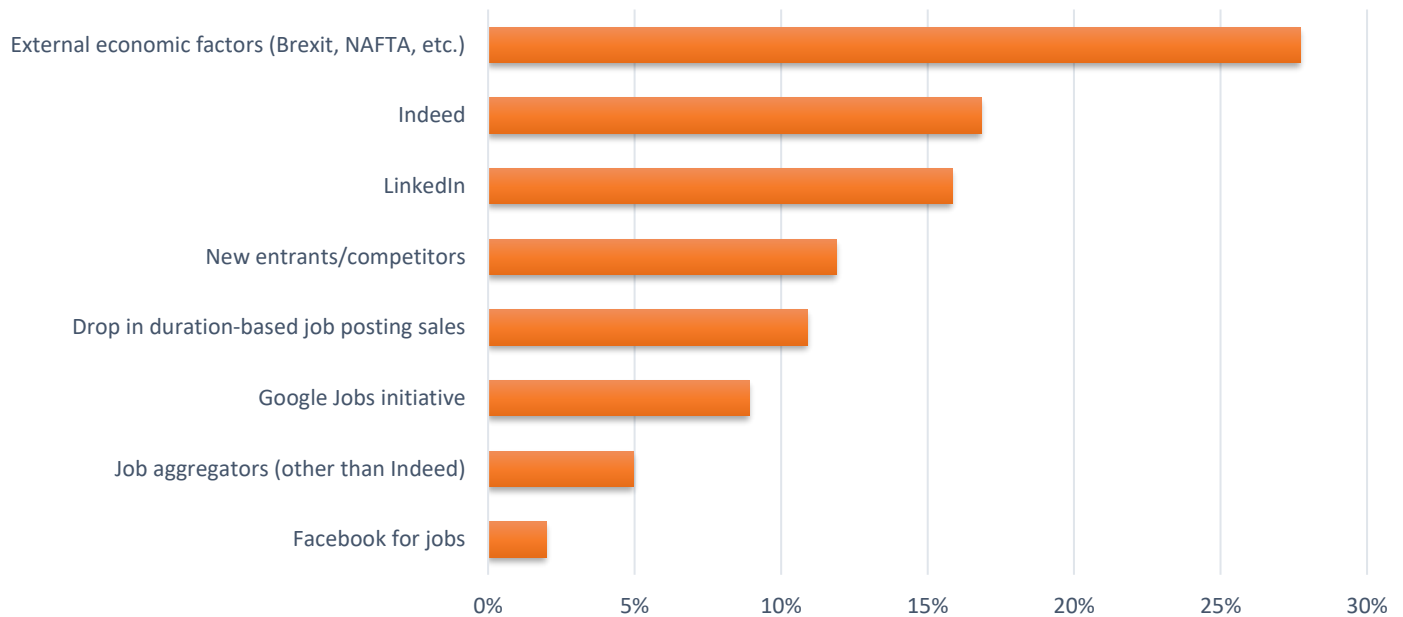
Over the next 12 months, how do you predict the following elements of your business to change?



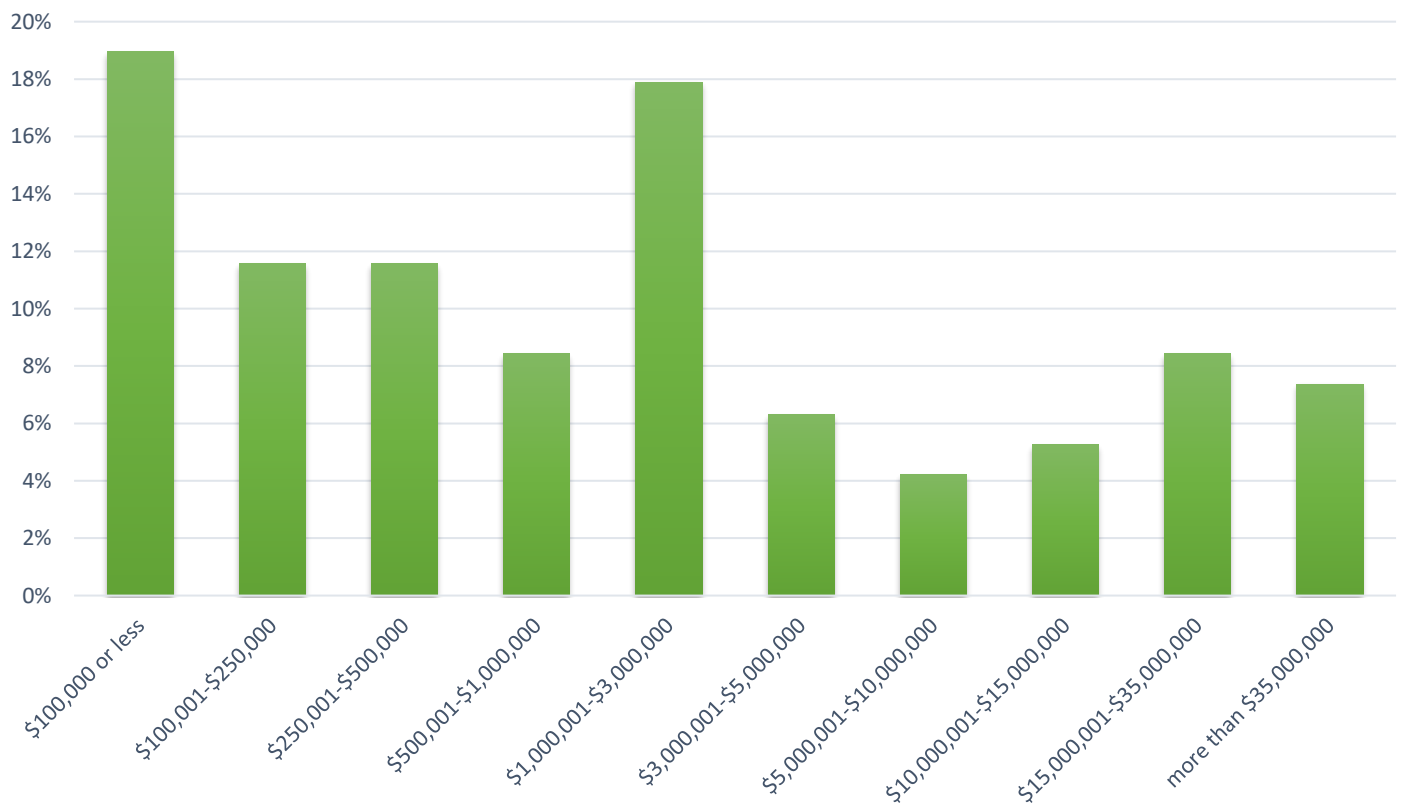
Which of the following actions are you planning in the next 12 months?



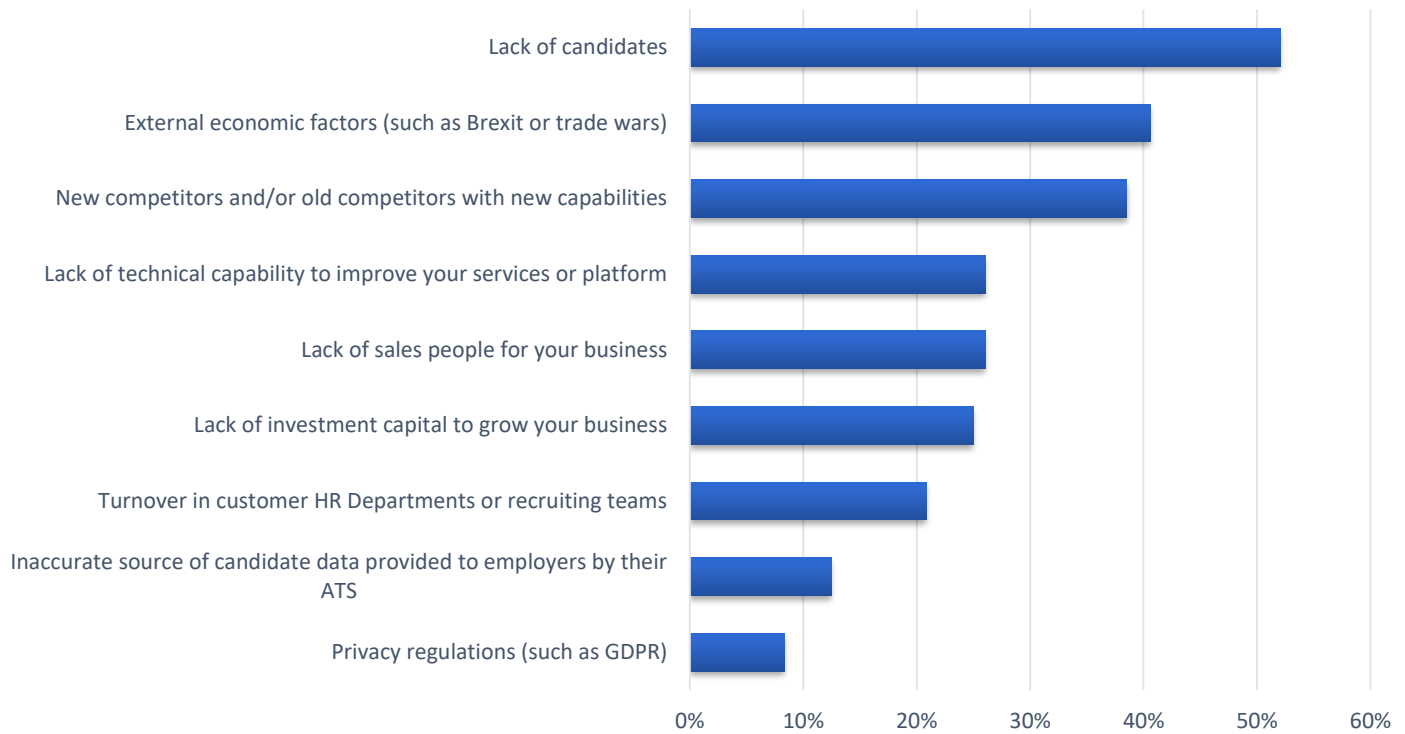
Which of the following do you see as the *single biggest* competitive threat to your business in the next 12 months?



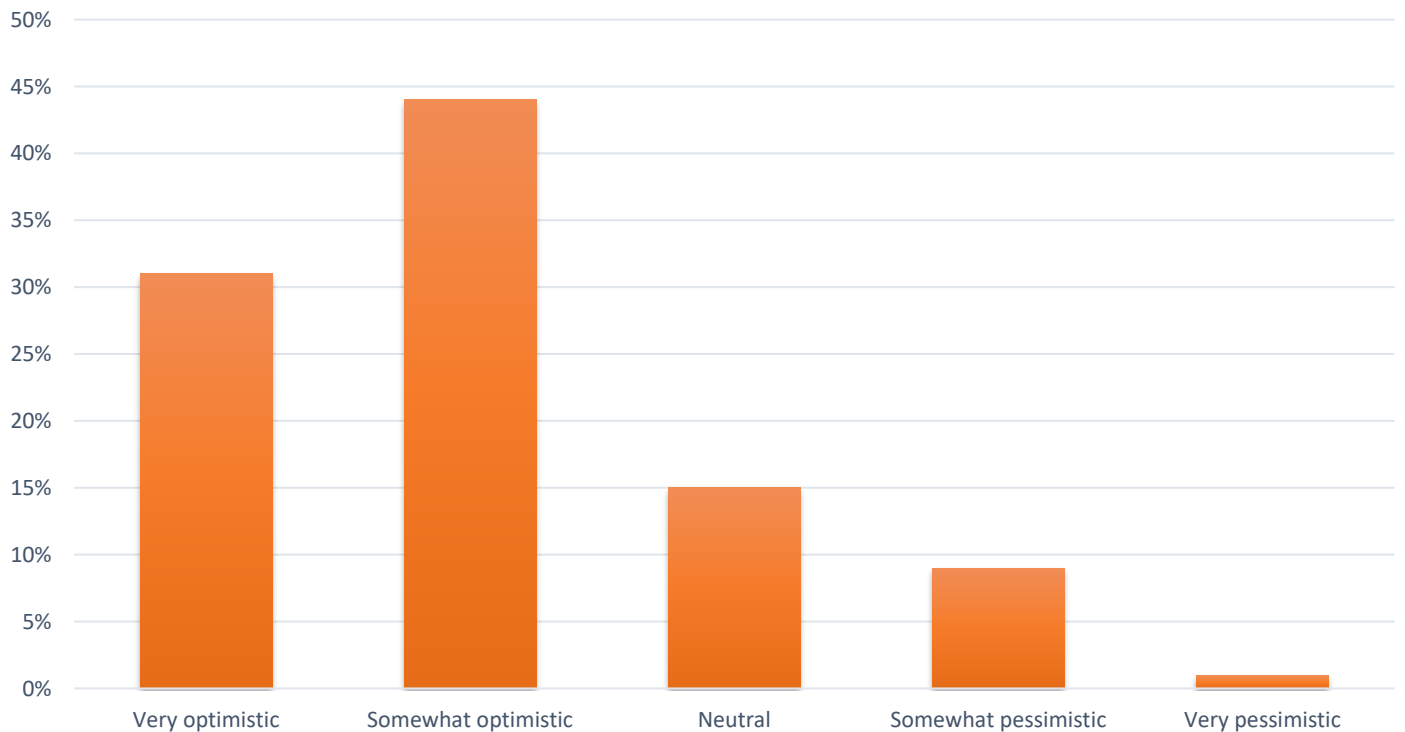
What is your best estimate of revenues for your business in the next 12 months? (in USD)



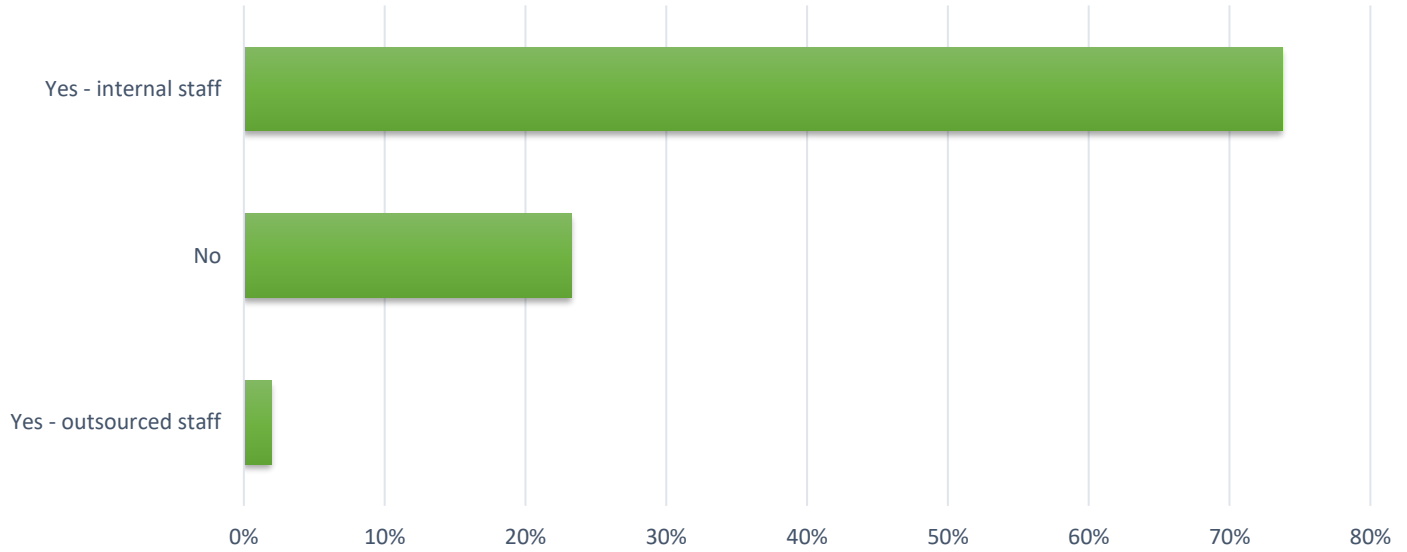
Which (if any) of the following challenges or impediments will ***significantly*** affect your organization during 2019-20?



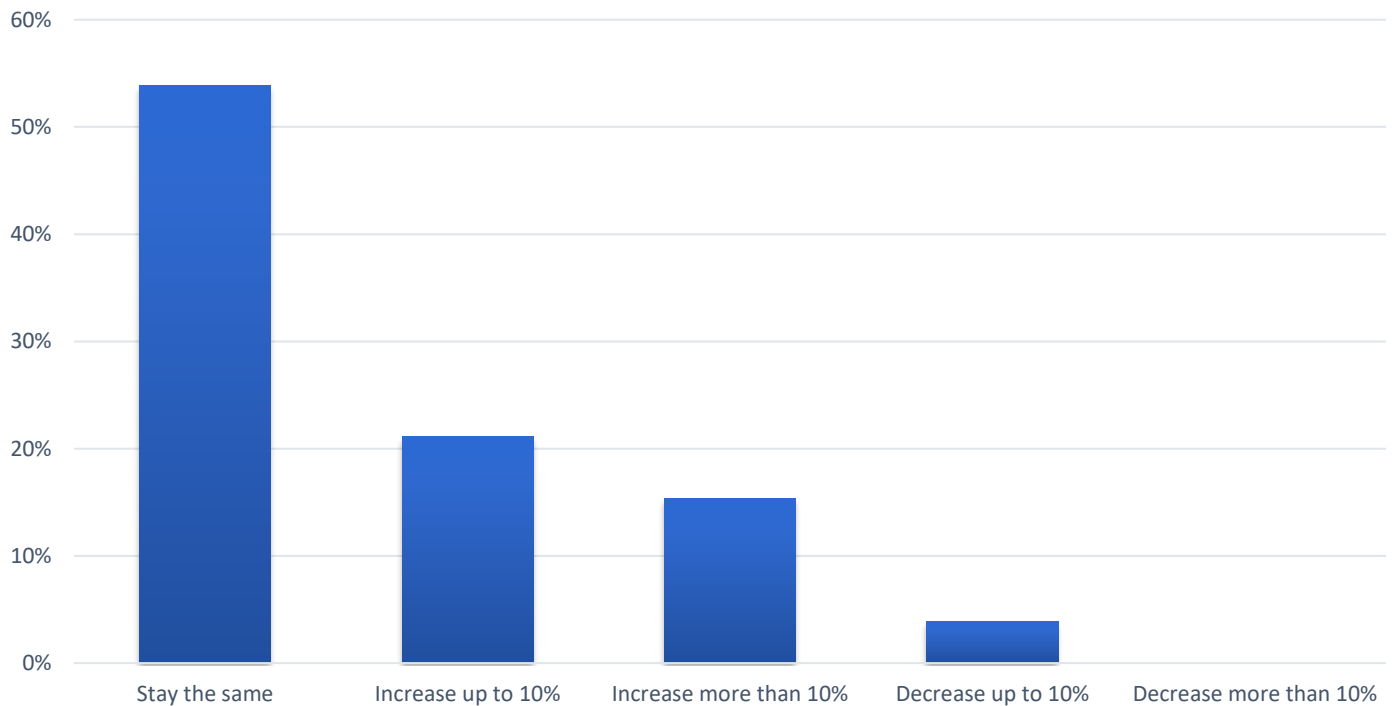
What are your feelings for your organization's opportunities during the next 12 months?



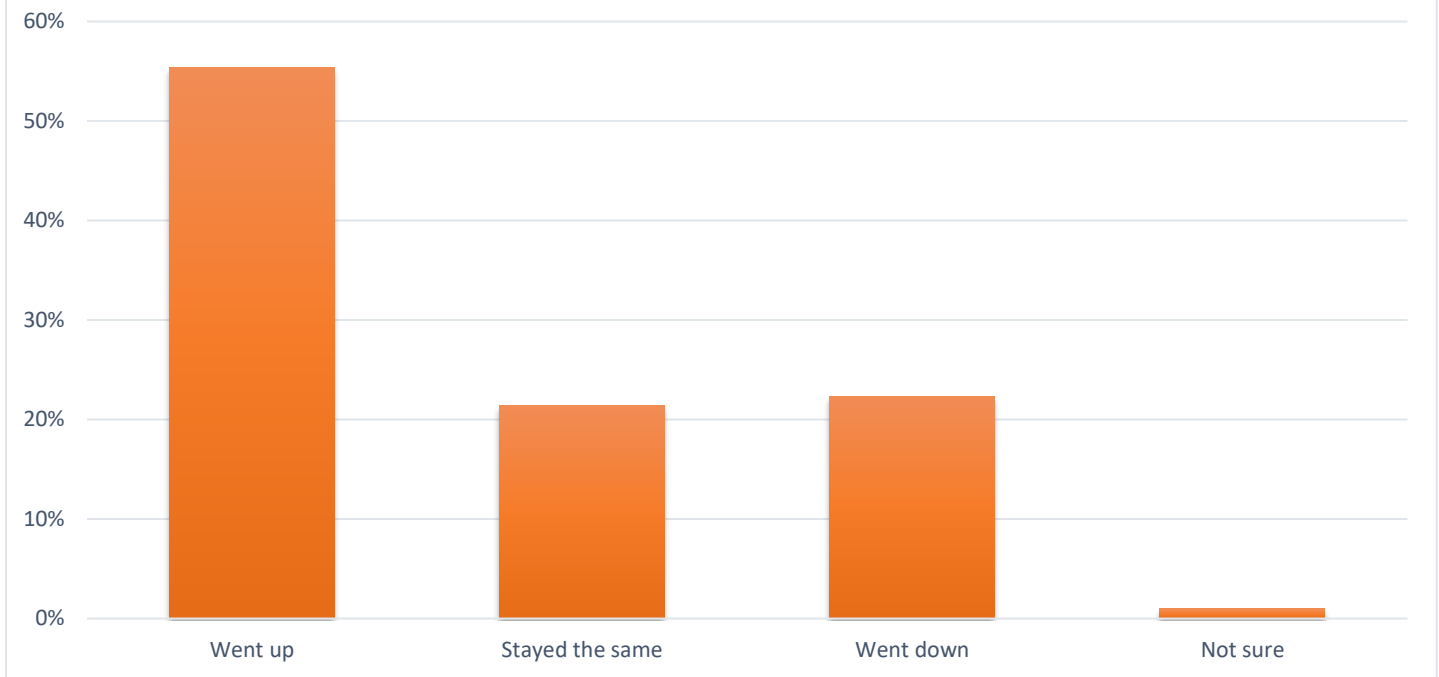
Does your organization have a dedicated sales staff?



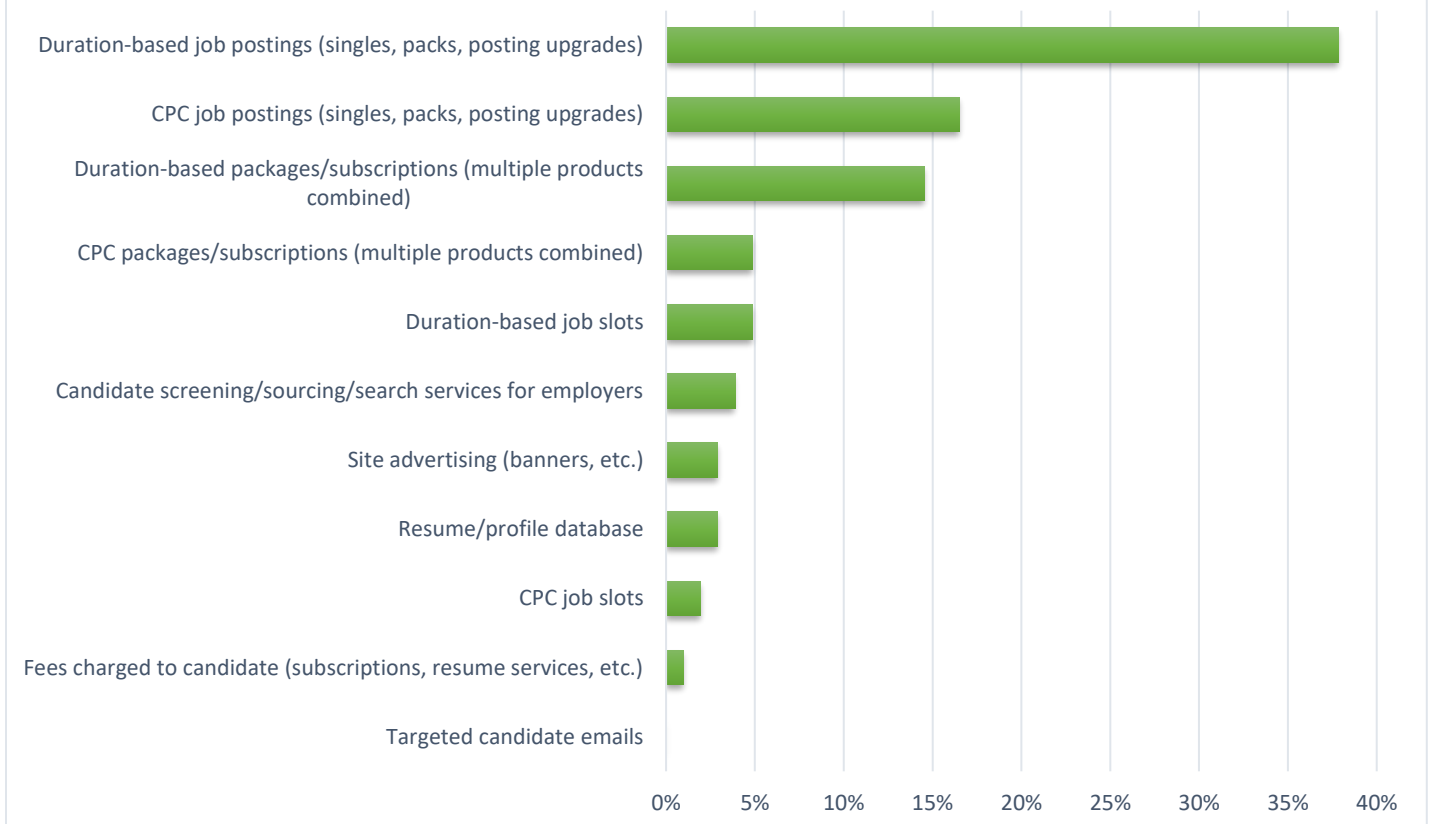
For the coming 12 months, which of the following best describes your overall rate structure for your products and services?



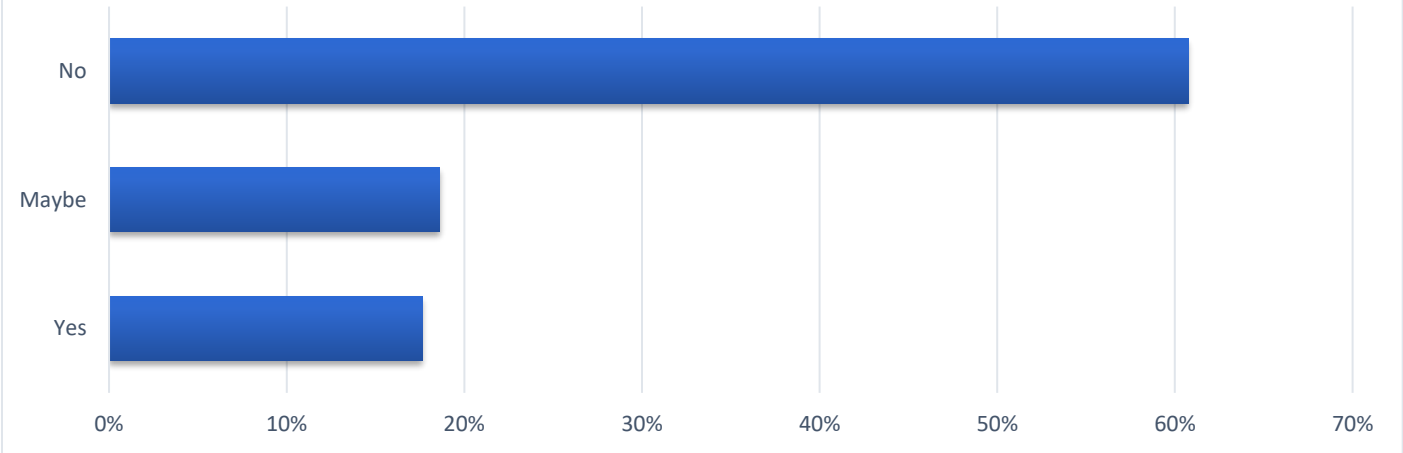
How has your total gross business revenue for the past 12 months changed?



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.)



When marketing your organization to candidates and/or employers, what word or phrase do you use to describe yourself? (i.e., job board, recruiting site, sourcing tool, 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
- 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