

Online Recruiting Survey
Fall 2011
Job Boards

November 2011



**Job Board
Doctor**

Survey Structure:

The Online Recruiting Fall 2011 survey of job boards was conducted to better understand the current state of the job board industry. Particular focus was placed on the utilization of new technologies and the effectiveness of other recruitment tools on the job boards.

There were a total of 153 responses. The survey was conducted during October 2011.

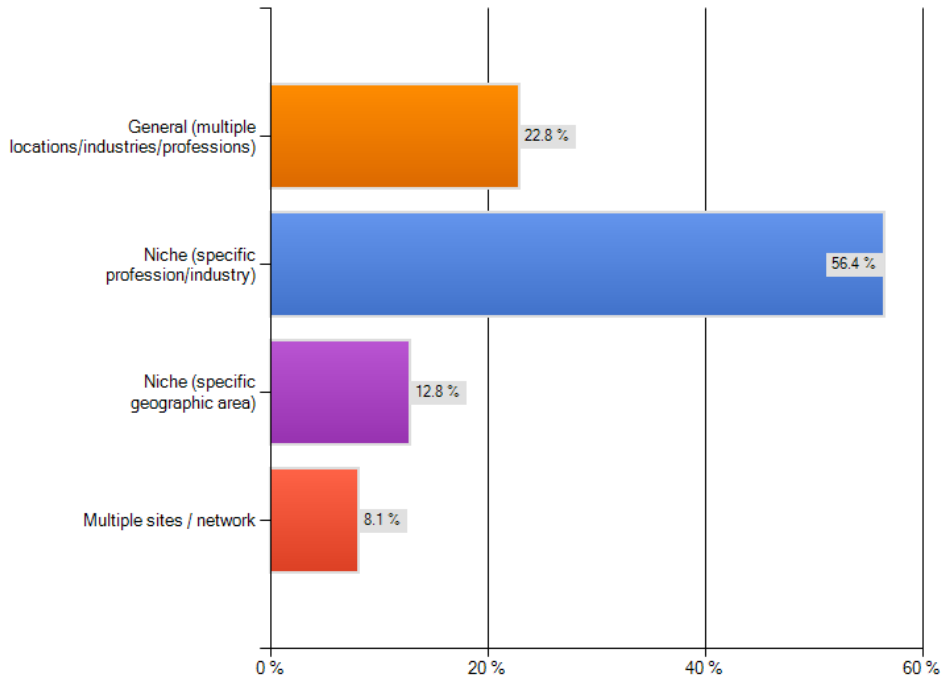
Executive Summary

Job Board Doctor has been conducting surveys of the job board industry since 2009. This survey represents the largest and most comprehensive survey to date, comprising responses from 153 job boards around the globe.

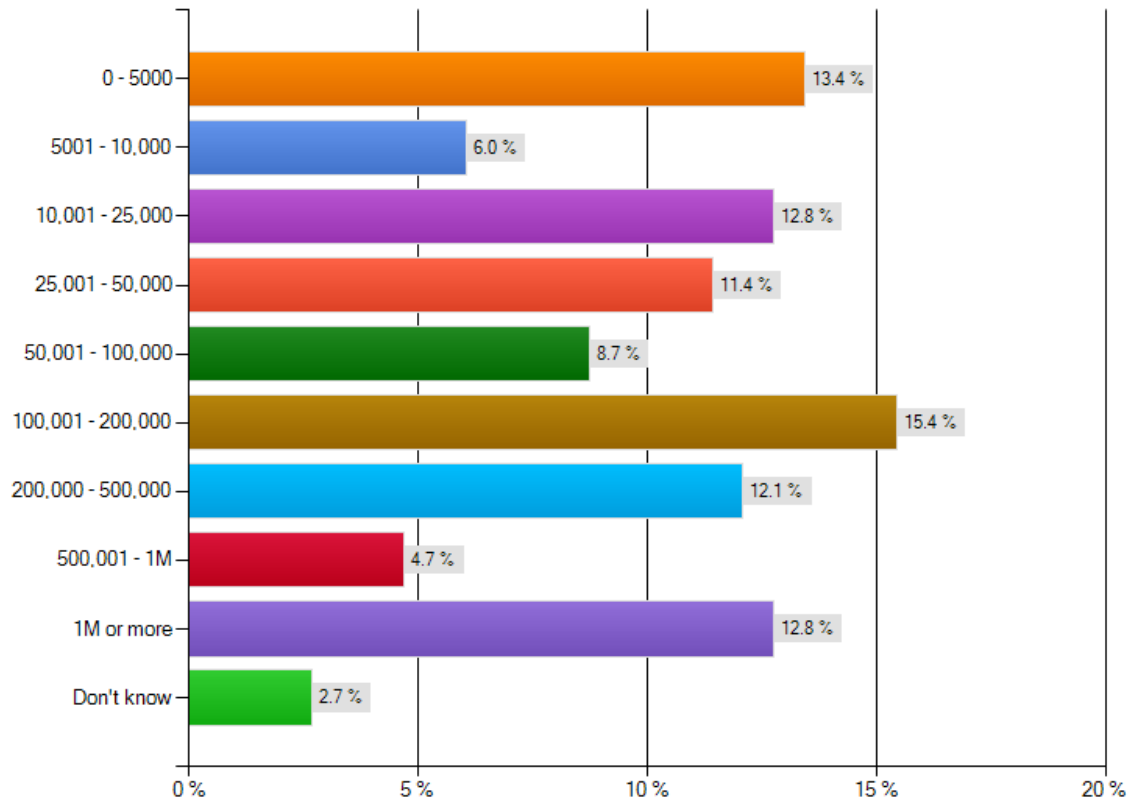
Key findings from this year's survey:

- One-third of respondents have a **mobile-friendly site** – and another third are working on creating such a site for the coming year
- Use of aggregators such as Indeed and SimplyHired by job boards has **increased by 14%** in the past 12 months
- Respondents are **less worried** about .jobs, the recession, search engines, and 'free' job sites than they were a year earlier
- Respondents are **more worried** about LinkedIn, technological change, and price erosion
- Job boards are focusing on SEO, social media, launching new products, and increasing sales staff during the coming year
- An impressive 88% are optimistic about opportunities for their job boards in the next 12 months

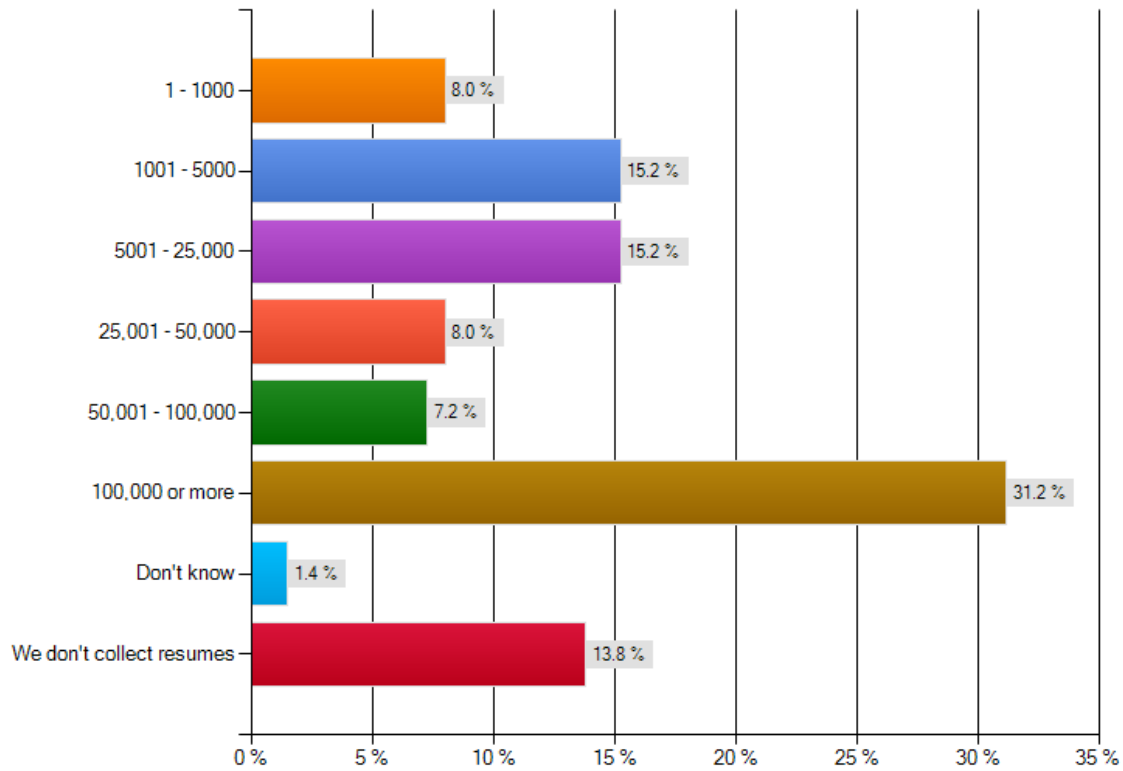
How would you characterize your job board's focus?



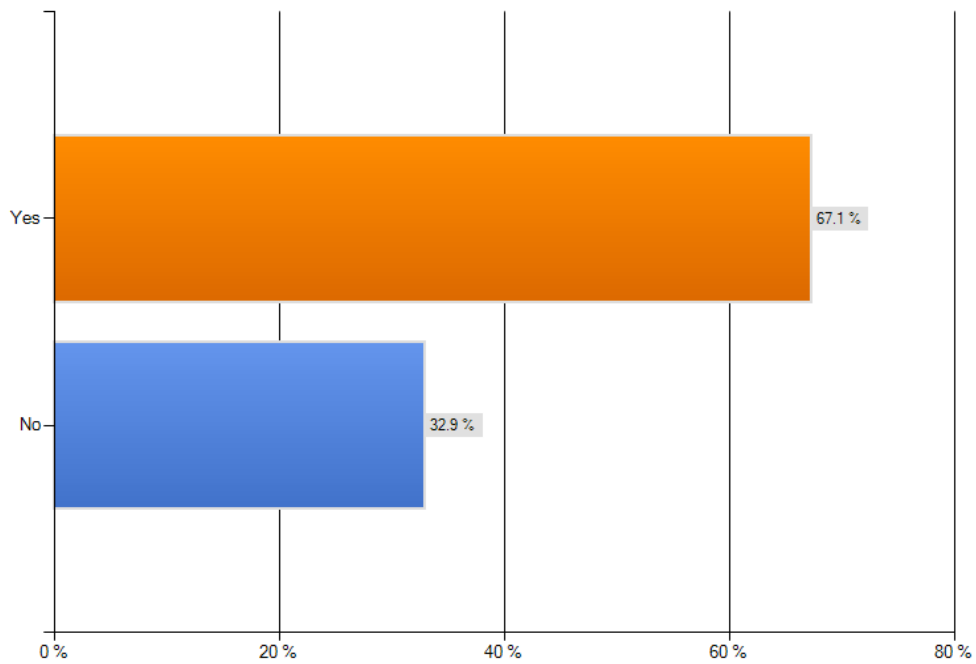
On average, how many unique visitors does your site have per month?



Approximately how many current or active resumes do you have in your resume database?

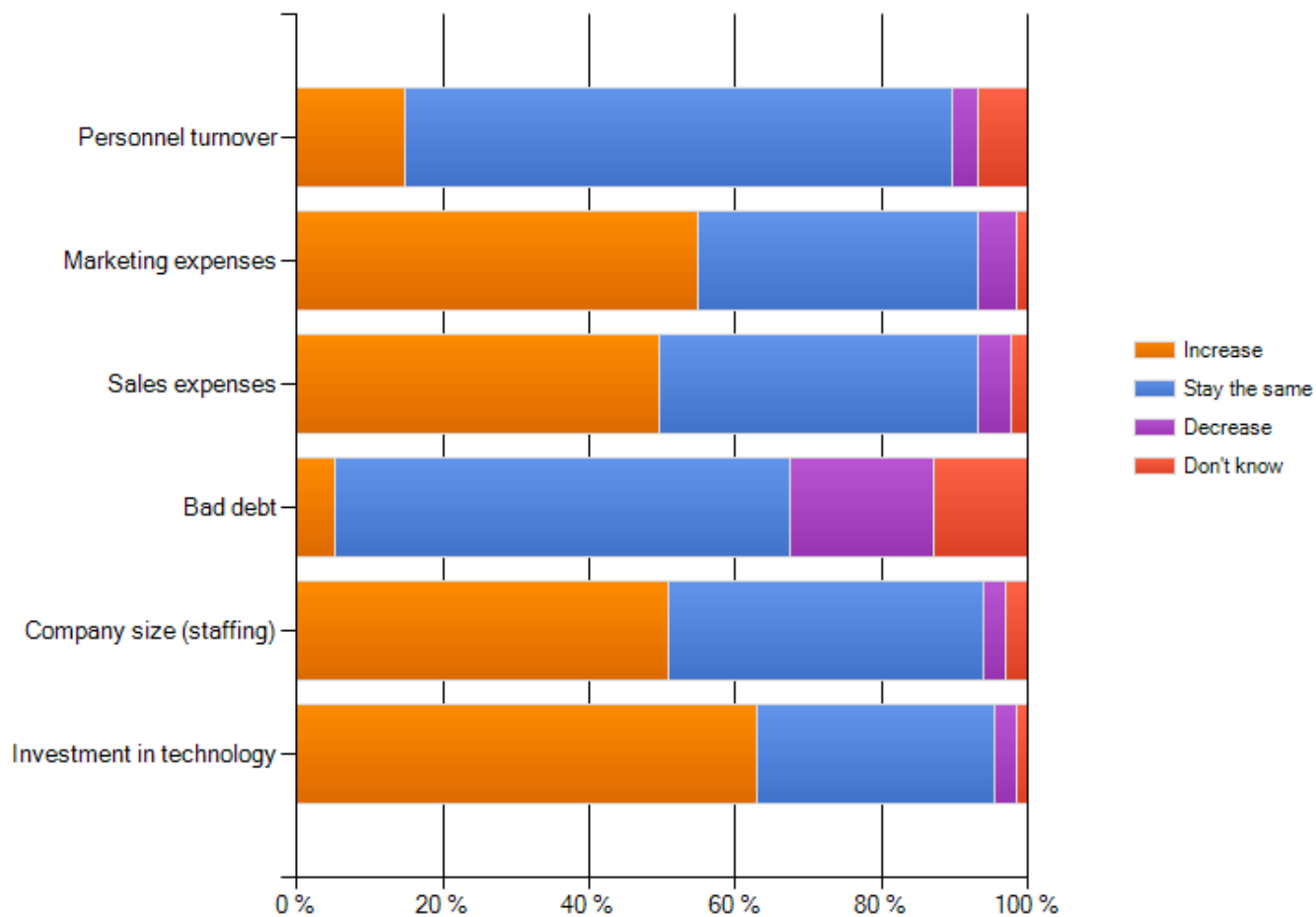


Do you use an aggregator (such as Indeed or Simply Hired) to either provide additional jobs on your site, or to crosspost your jobs to the aggregator site?

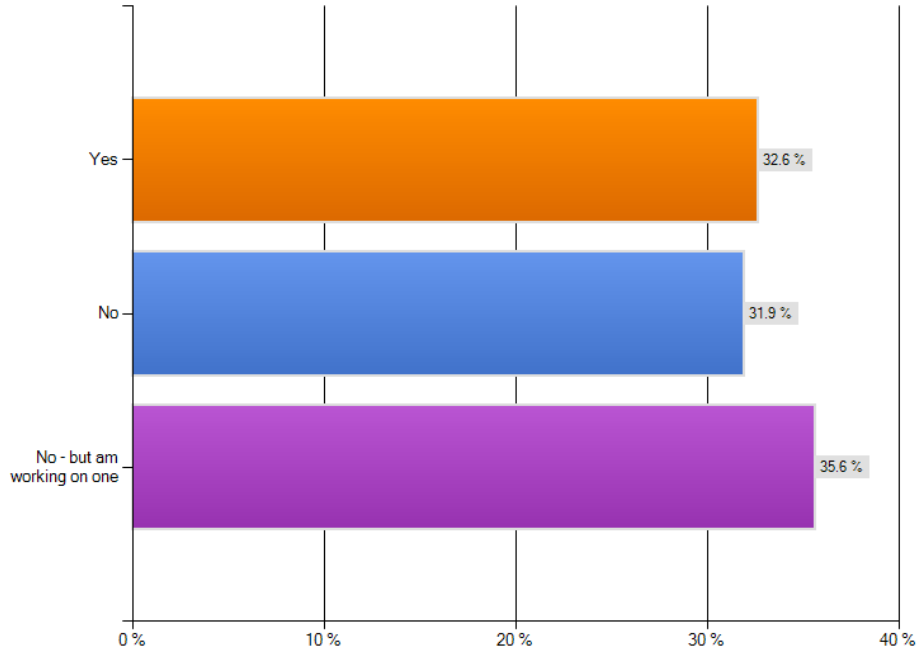


Comment: This represents a 14.9% increase since fall 2010.

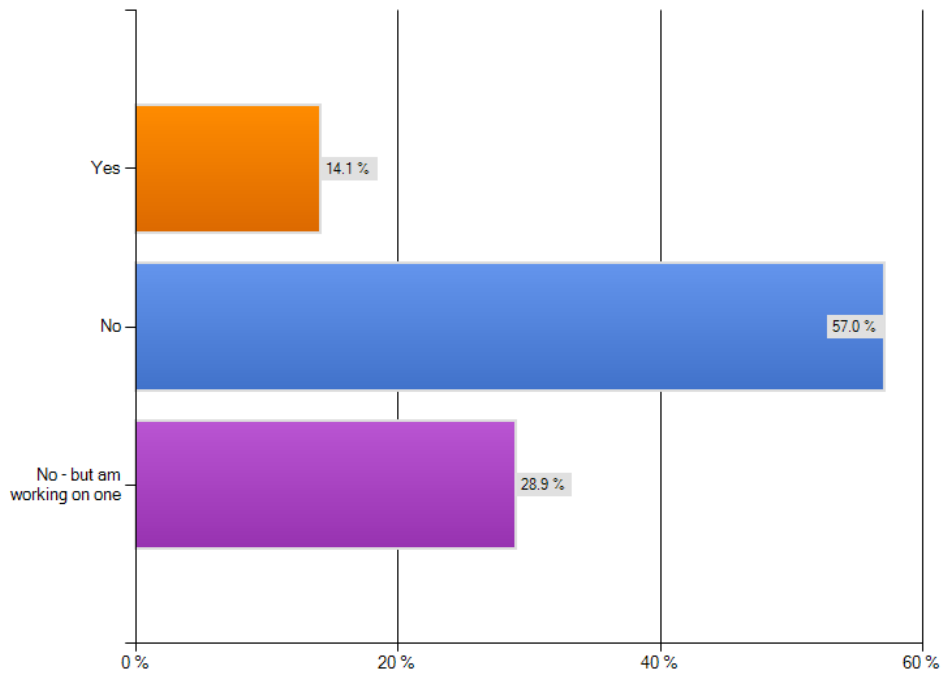
Over the next 12 months, how do you predict the following elements of your job board company to change?



Do you have a mobile-friendly version of your site?

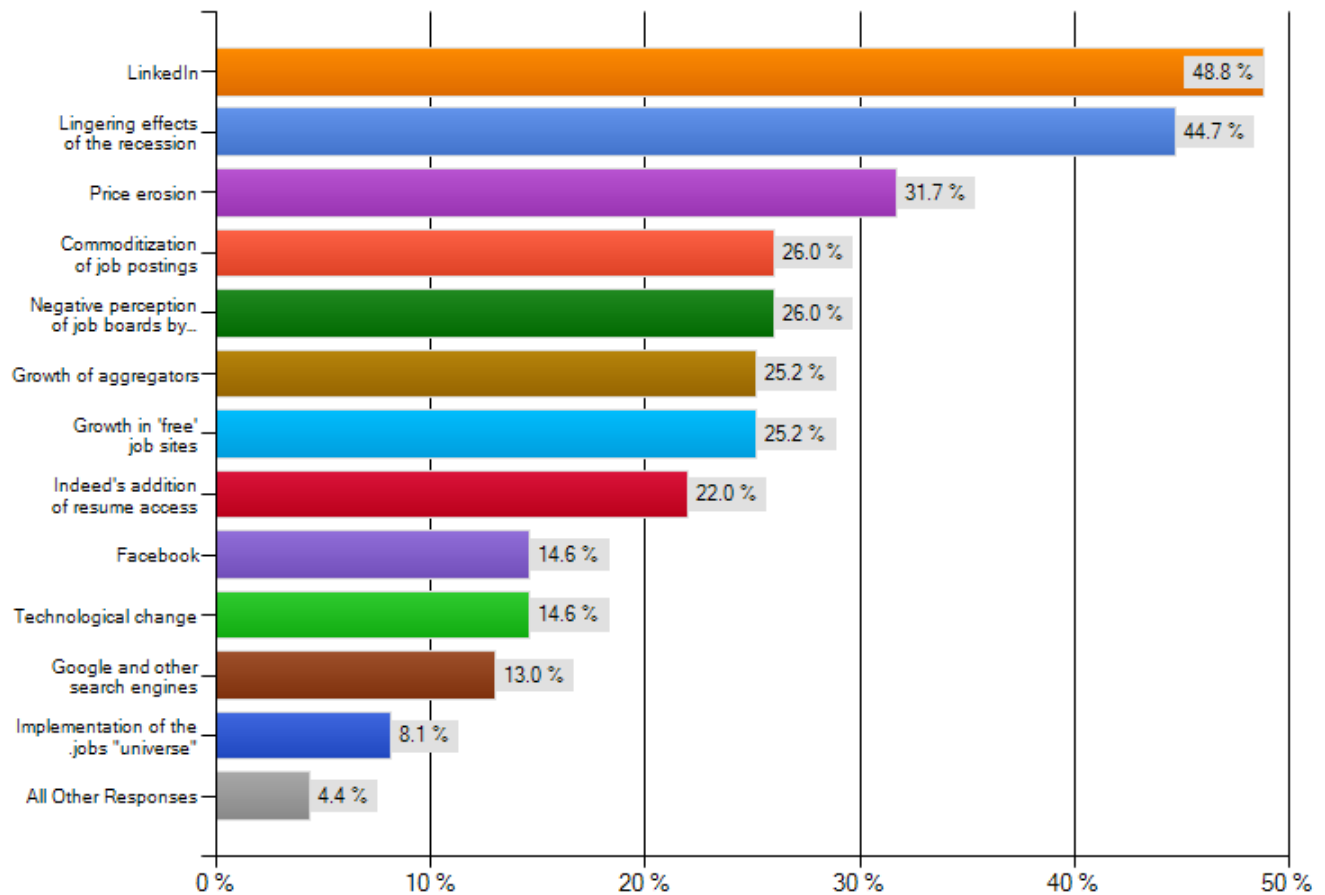


Do you have a mobile app (iPhone or Android) for your job board?



Comment: when these responses are filtered by job board revenue, an interesting – and perhaps predictable – pattern emerges: sites with \$100,000 or more in revenue are 2-3 times more likely to have either a mobile-enabled site or a mobile app than those under \$100K

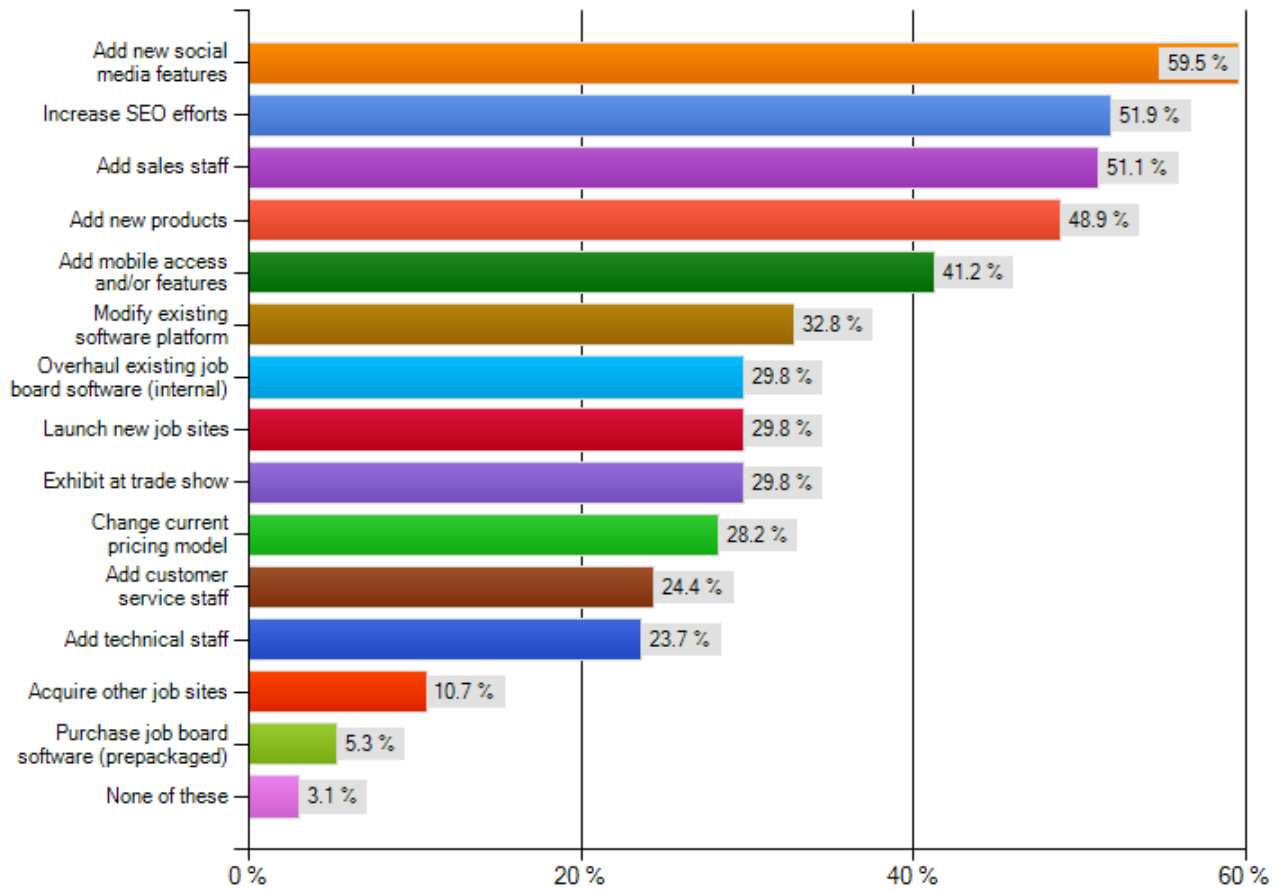
Which of the following do you see as the biggest threats to your job board company in the coming 12 to 24 months? (Check all that apply)



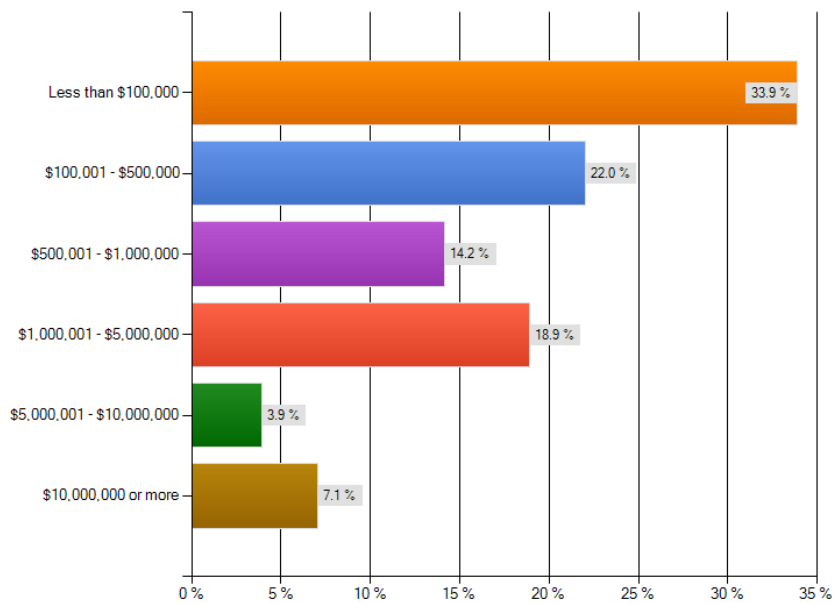
Comments: In comparing this year's responses with the Fall 2010 survey, some interesting changes are evident:

- Concern about LinkedIn has grown by 13%
- Worry about 'free' job sites has dropped by 14%
- The 2nd largest increase in concern (after LinkedIn) is regarding price erosion, which climbed by 11%
- Other areas of *decreased concern* were: the .jobs universe (-9%); the recession (-10%), and Google/search engines (-12%)

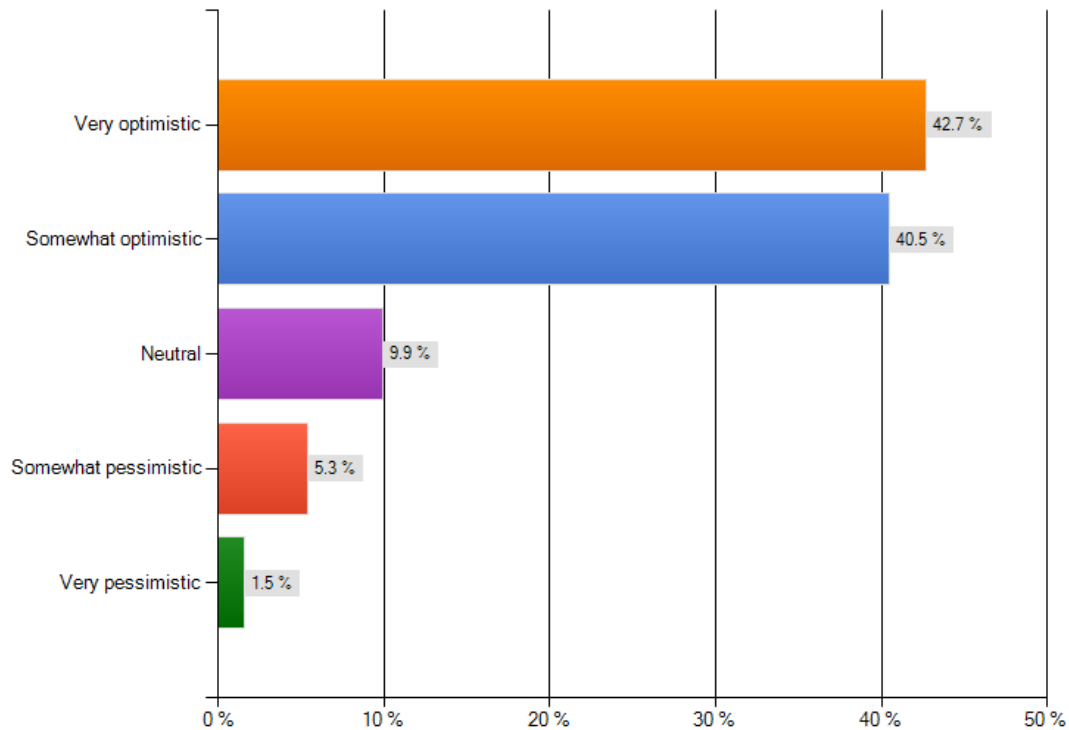
Which of the following actions are you planning in the next 12 months? (Check all that apply)



What is your best estimate of revenues for your site in the next 12 months?



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



Comments from respondents:

- *“Vertical market “talent community” based boards are displacing standard traditional horizontal job boards”*
- *“Much of the competition are locking down their business. Their immobility presents opportunity.”*
- *“Differentiation through actionable data, technology innovations on the client side, robust early success in advanced projects, and three words: mobile, social, global.”*
- *“I think our overhaul will have positive effects, but overall the job board business has commoditized and leaves little room for revenue increases/stability.”*
- *“We're well positioned and will be rolling out new product enhancements.”*
- *“Revenues have been good last 12 or so months and even better over the past six months and even better over the past three months.”*
- *“Improved employment market, clients understanding social media and what we are doing.”*
- *“The online job board industry is being alienated by Social Media sites. Eventually, jobs will find you and one won't need to hunt for them.”*
- *“Growth in new markets/niches.”*
- *“Our niche, repeat businesses and new alliances give me optimism.”*
- *“Struggling internally to keep pace with industry technically.”*

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
- Product development and launch
- Sales and marketing
- 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 numerous job boards, software companies, and HR-related sites over the past 20 years.

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