

2016 TATECH – Job Board Doctor

*Global Job
Board Survey*

TATECH

THE ASSOCIATION
FOR TALENT
ACQUISITION
SOLUTIONS

**JOB BOARD
DOCTOR**

SPONSOR



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INTRODUCTION

Dear Colleague:

We're pleased to provide the Final Report for the 2016 TATECH - Job Board Doctor Global Job Board Survey. It includes aggregated data on current job board trends and on job board opportunities, challenges and performance metrics as well as selected comments from survey participants. In short, the report provides a uniquely comprehensive and detailed portrait of today's worldwide job board community.

We'd like to thank Talenetic for serving as the Sponsor of the 2016 Survey. Its commitment to the continuing success of job boards sets them apart in our industry.

The TATECH - Job Board Doctor Survey is one of a number of major research initiatives conducted by TATECH for the global talent acquisition solutions industry. Among its other research initiatives are a survey of ATS providers to identify key trends, developments and issues in that market and a survey of recruiting technology users to determine the state of the art and needed developments in talent acquisition products and services. TATECH also conducts spot surveys of employment site operational and business experiences conducted on its Center of Excellence, Jobboarders.com, and surveys of both job seekers and recruiters to determine how best to serve them in the job market.

In addition to working with TATECH on the Global Job Board Survey, JobBoardDoctor provides a wide range of consulting services for the industry, including strategic planning and assessment, site valuations, and site analyses. JobBoardDoctor also provides research on the job board industry, including surveys on aggregator usage and job seeker behavior on job boards.

Best Regards,

Peter Weddle
CEO, TATECH

Jeff Dickey-Chasins
Job Board Doctor

SURVEY METHODOLOGY

As it has for several years, the 2016 TAtch - Job Board Doctor Global Job Board Survey was conducted to better understand current developments, issues and opportunities in the job board segment of the global talent acquisition solutions industry.

The survey was open and promoted to all job boards worldwide. The questionnaire was developed by Peter Weddle and Jeff Dickey-Chasins and took less than 17 minutes to complete. Respondents could participate anonymously or by name.

The survey included 30 questions covering:

Respondent demographics

Site performance

Organizational business model

2016 plans for business and service development

Perceived risks and opportunities

Survey responses were collected between January and March, 2016. A total of 211 responses were received from job boards around the world, an 8 percent increase over the previous year.

Executive Summary

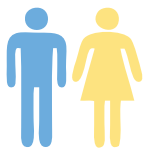
This Survey does not explore whether job boards are still relevant. Just as Mark Twain once quipped, “Reports of my death have been greatly exaggerated,” job boards have refuted their critics and are today neither dead nor ineffective. In fact, as numerous other surveys have found, quite the opposite is true. They are – as they have always been – a major source of talent for employers worldwide.

What this Survey does address is the keys to that success. It provides a unique window on the views of job board owners and operators and the performance of their sites. These insights identify and prioritize the business challenges and opportunities all job boards face and provide an assessment of the strategies and tactics that can be used to sustain their success.

In addition and where appropriate, their responses have been compared to those collected in the 2015 Survey to isolate important shifts in thinking or emphasis and to highlight trends that may be building toward a greater impact on the industry in the future.

Key Findings

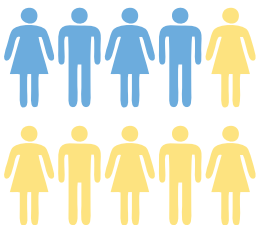
Job seekers vote with their feet, and the sustained level of traffic to job boards is proof positive that they remain important destinations for them. As was the case last year, over half of the respondents reported site traffic of more than 50,000 unique visitors per month.



Similarly, the continued reliance on job boards for talent acquisition underscores their continued importance for employers. ***Almost one-in-two of the respondents (47 percent) posted 500 or more jobs on their site each month.***

No less important, those sites deliver the talent to their customers. ***Over half of the respondents*** said that the jobs posted on their sites generate 11 or more applications per posting.

Not surprisingly, ***over two-thirds of the respondents*** reported that quality of job applicants is the single most important criterion for employers. However, that figure represents a drop of over 25 percent from the 2015 Survey.



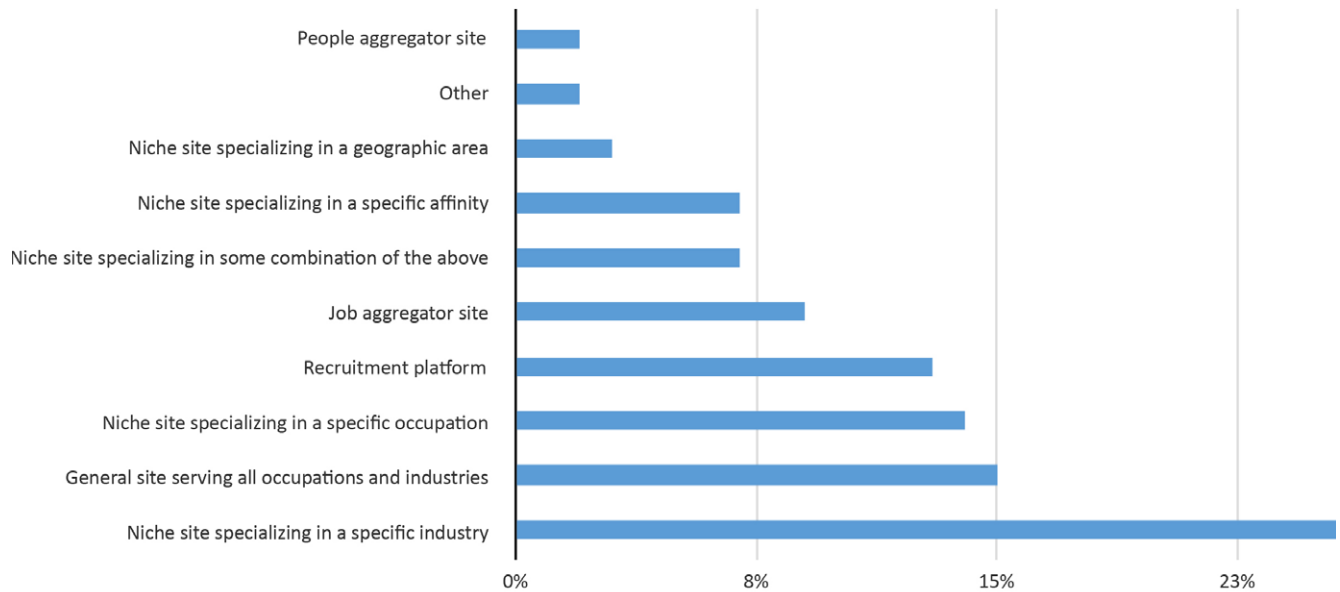
Almost six-out-of-ten of the respondents (59 percent) reported that their sites derive 30 percent or more of their traffic from mobile sources. That finding was up significantly from the less than half of the respondents in the 2015 Survey who said they got 20 percent or more of their traffic from such devices.

Finally, ***better than three-quarters of the respondents (78 percent)*** said they are optimistic about their business opportunities during 2016. That's a very positive outlook, to be sure, but down from the almost 90 percent of respondents in the 2015 Survey who held such a view.

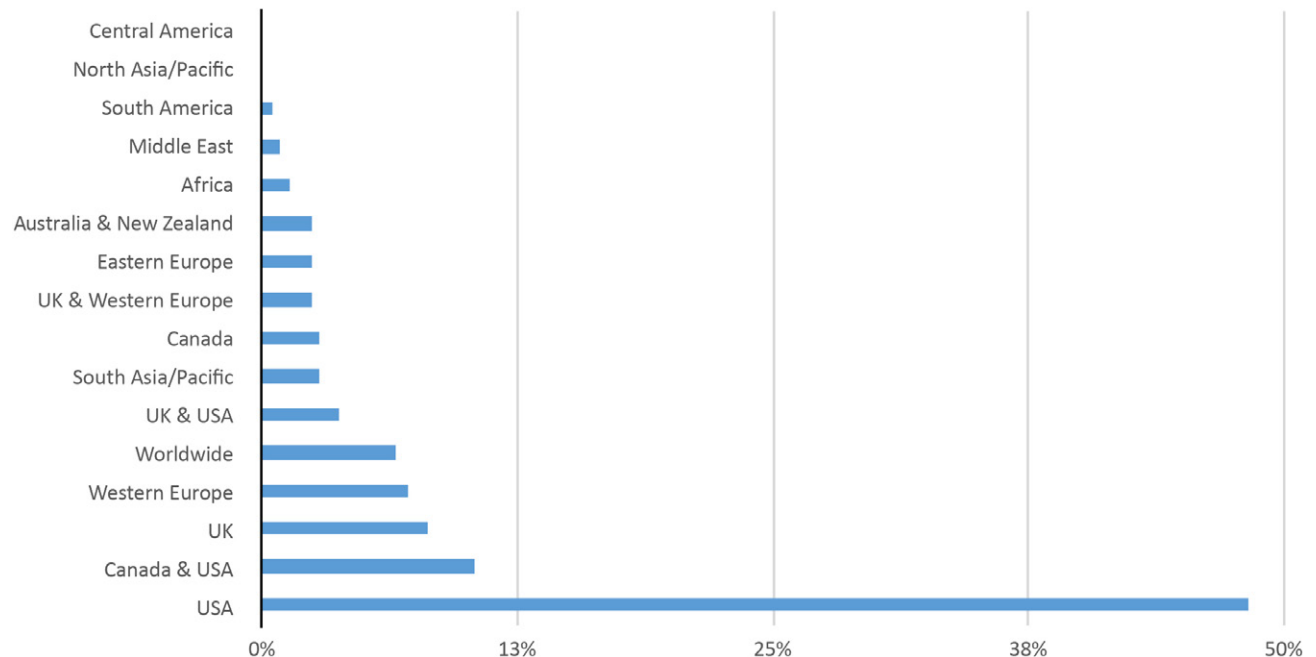
SURVEY RESPONSES

(collected between January and March, 2016)

How would you characterize your site's focus?



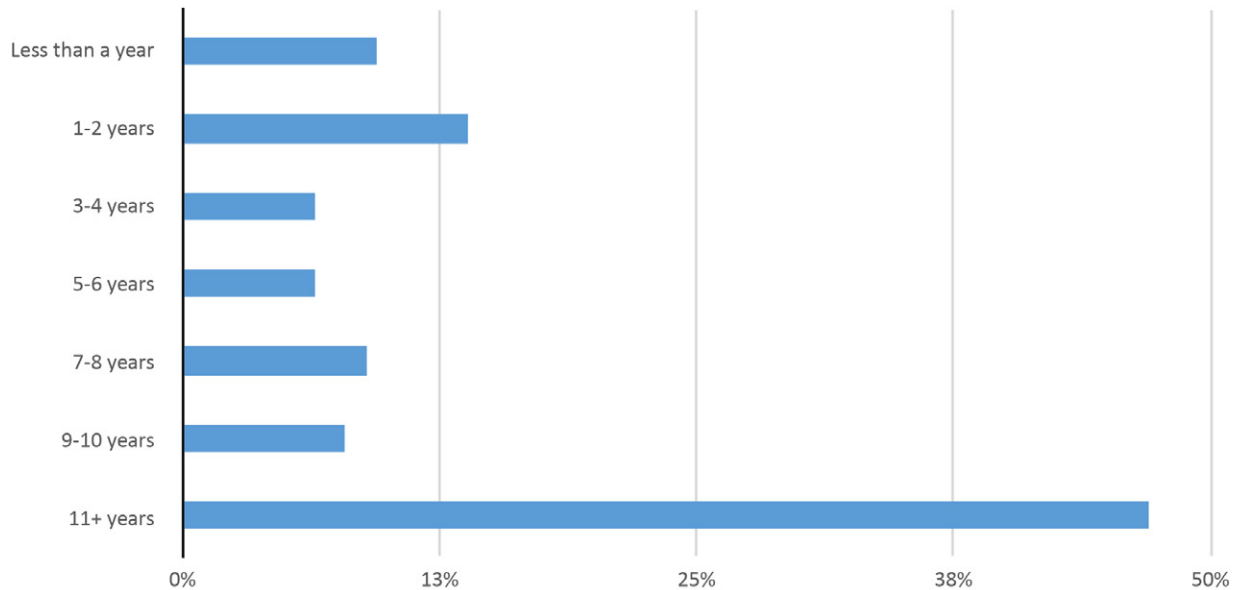
Where is your site's business primarily conducted?



SURVEY RESPONSES

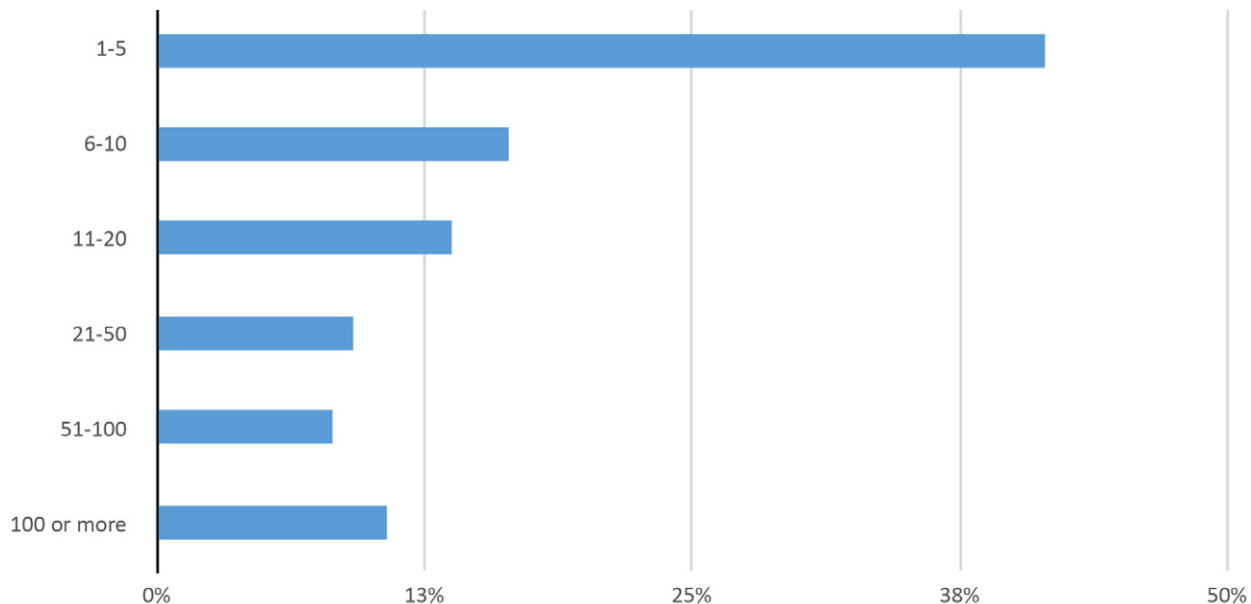
(collected between January and March, 2016)

How long has your site been operating?

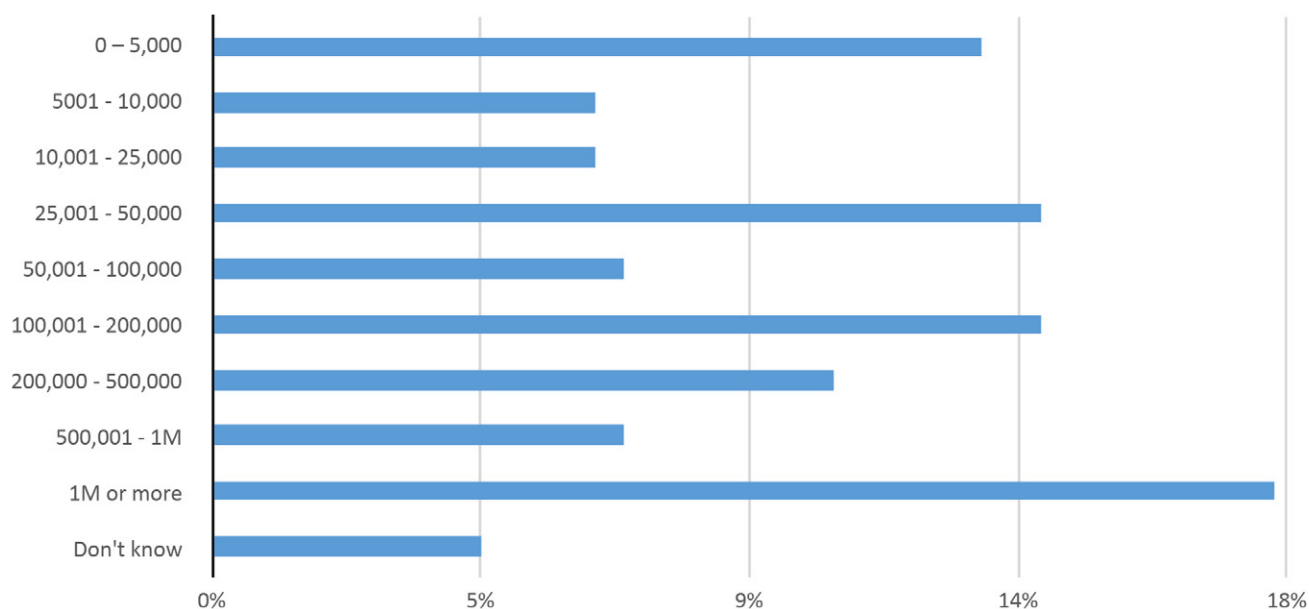


With a low barrier to entry, the job board community sees a large number of new entrants in the marketplace every year. However, almost half of the Survey respondents represented mature sites and businesses that have been in operation for 11 years or more. Further, the significant drop off after the 1-2 year mark suggests that it is an inflection point in job board development. If sites build a business model and brand that gets them beyond that point, they may well have what it takes to stay in operation for a decade or more.

How many employees work for your site?

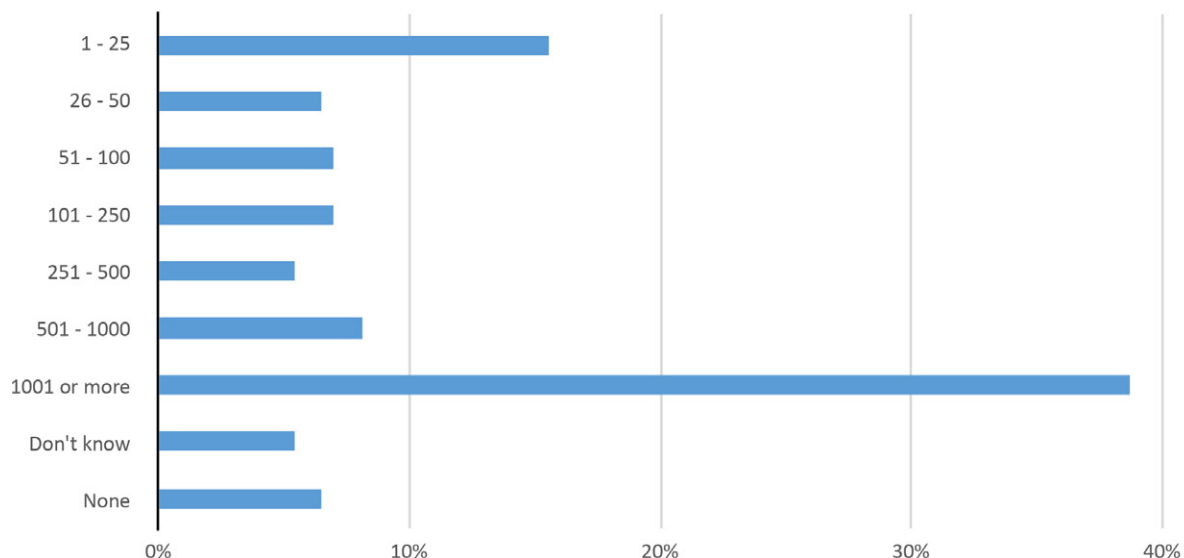


On average, how many unique visitors does your site attract per month?



The number of respondents reporting that they didn't know their site's traffic was down from the 2015 Survey – a positive development. In addition, the number of sites with traffic of 0-5,000 UVM was down from 2015, while the number reporting traffic of 25-50,000 UVM and 100-200,000 UVM was up.

On average, how many new paid jobs are posted on your site each month?

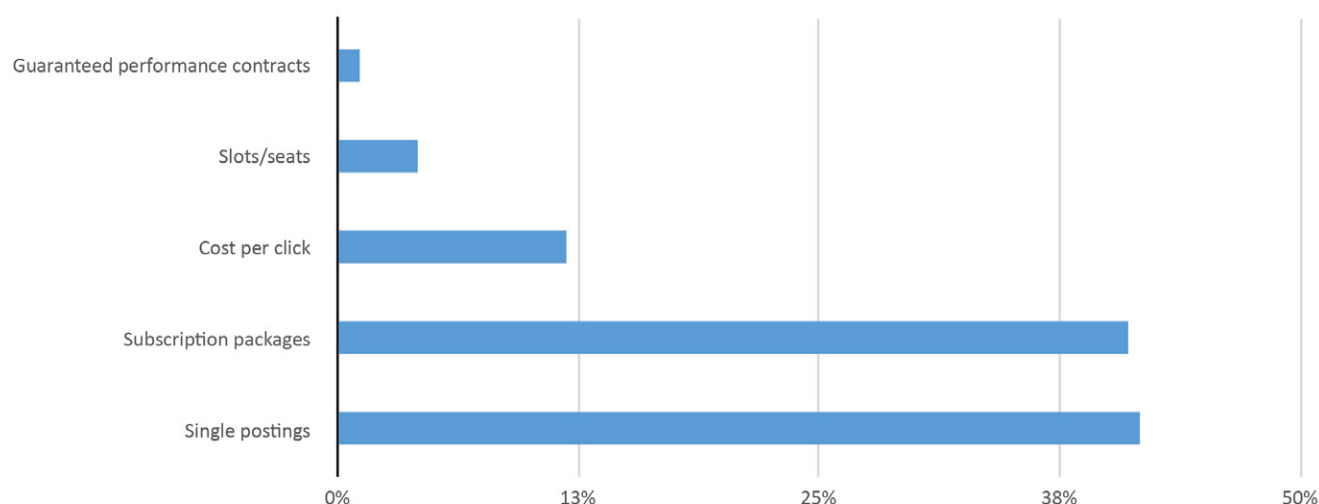


The bimodal distribution of paid jobs (i.e., mostly either 1-25 or 1001 or more) was much more pronounced this year than last.

SURVEY RESPONSES

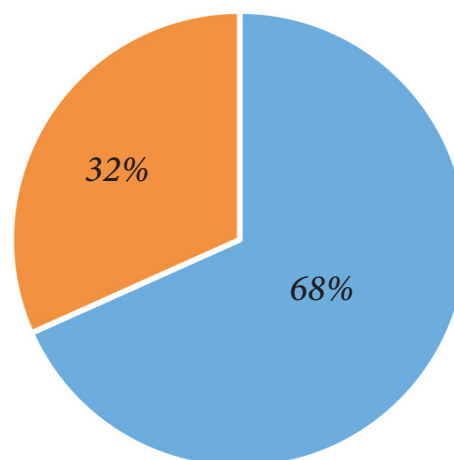
(collected between January and March, 2016)

Regarding your paid jobs, what kind of job posting does the majority represent?

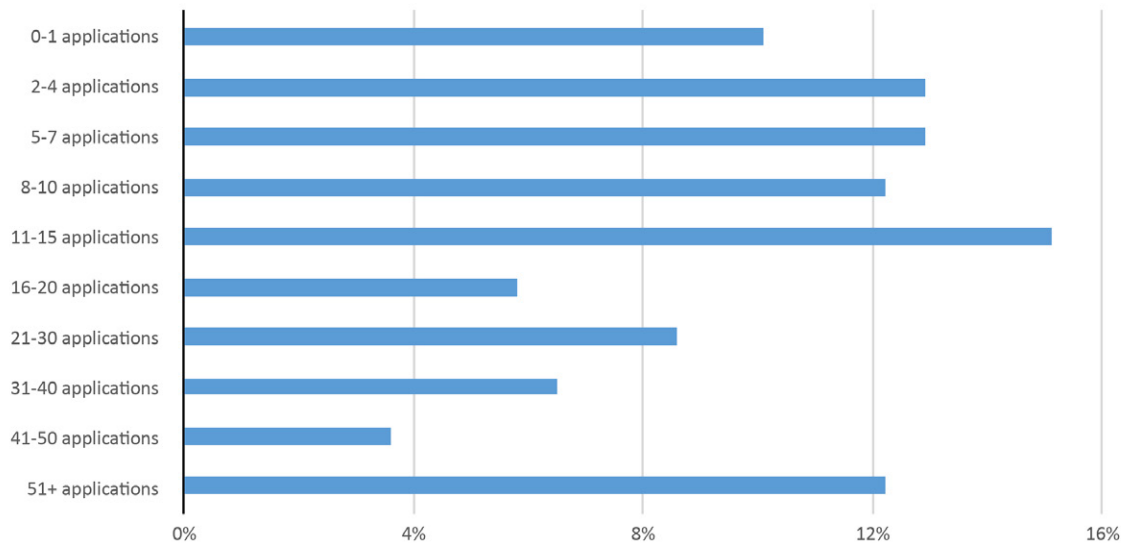


The number of single postings was down this year compared to last, while the number of cost-per-click responses was up. Interestingly, despite the tight budgets of employers, the number of subscription packages was about the same as that reported in 2015.

Do you track the number of applications for each posting on your site?

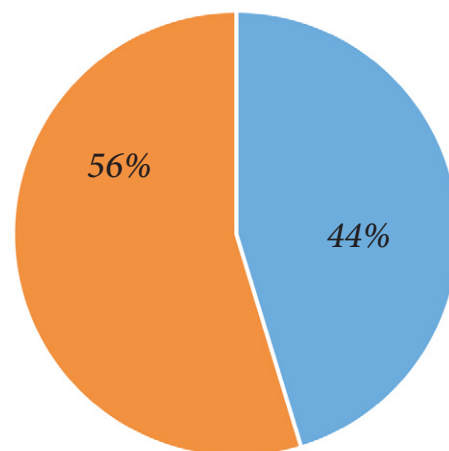


On average, how many applications were made for each posting in 2015?



The number of respondents reporting 51+, 31-40 and 5-7 applications was up this year compared to 2015, while the number reporting 16-20 and 2-4 applications was down.

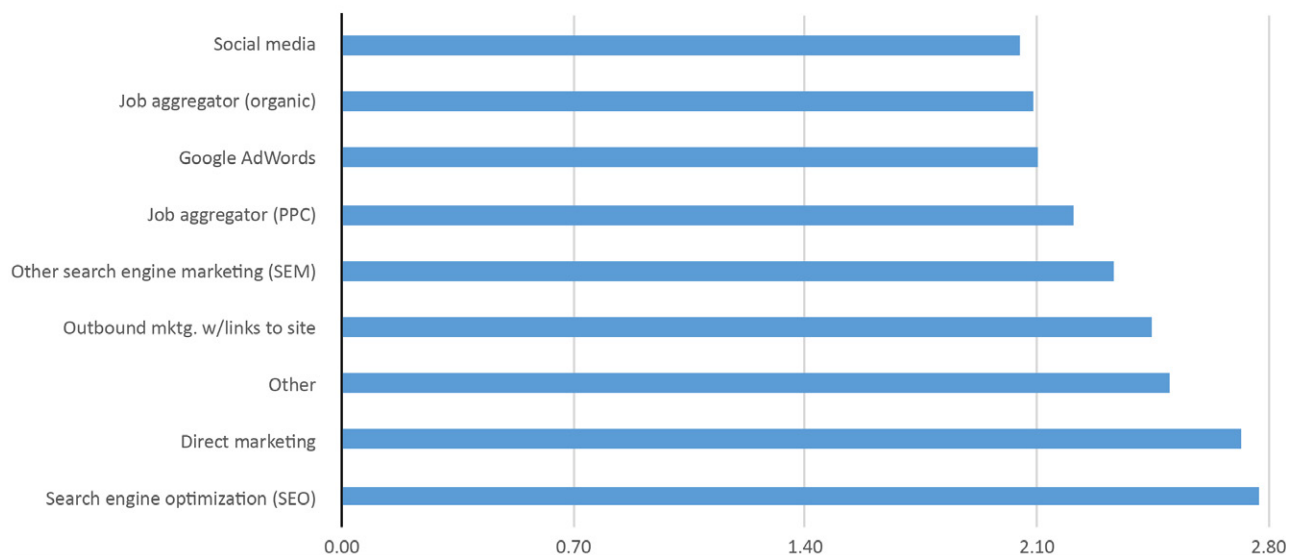
Do you track the conversion rate generated by your job postings (i.e., the number of times a job is clicked divided by the number of applications the posting generates)?



SURVEY RESPONSES

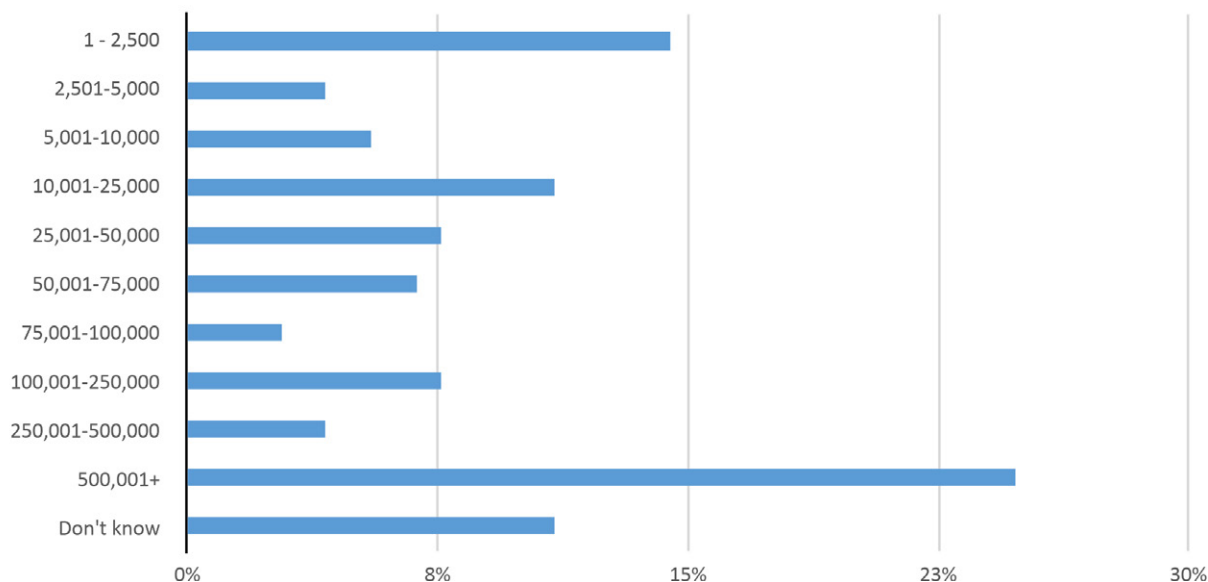
(collected between January and March, 2016)

How would you rate the following sources of traffic to your site, based on the conversion of traffic into applications for your client?

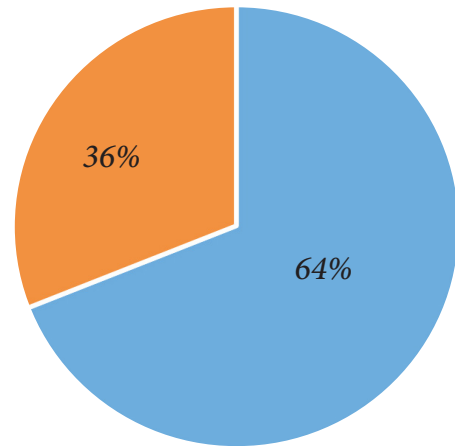
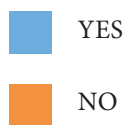


Search engine optimization went from #2 to #1 this year, while Job aggregator (PPC) and Job aggregator (organic) both went down.

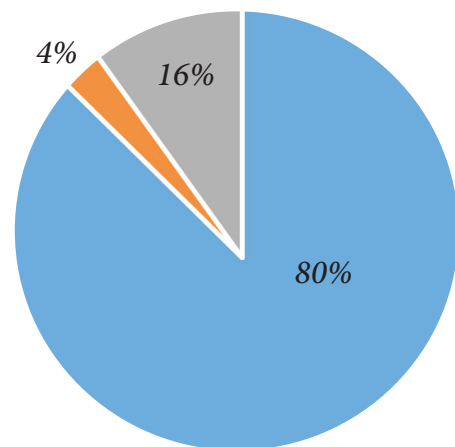
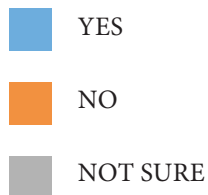
If your site offers a resume or profile database that is accessible by employers, how many resumes or profiles are currently stored in the database?



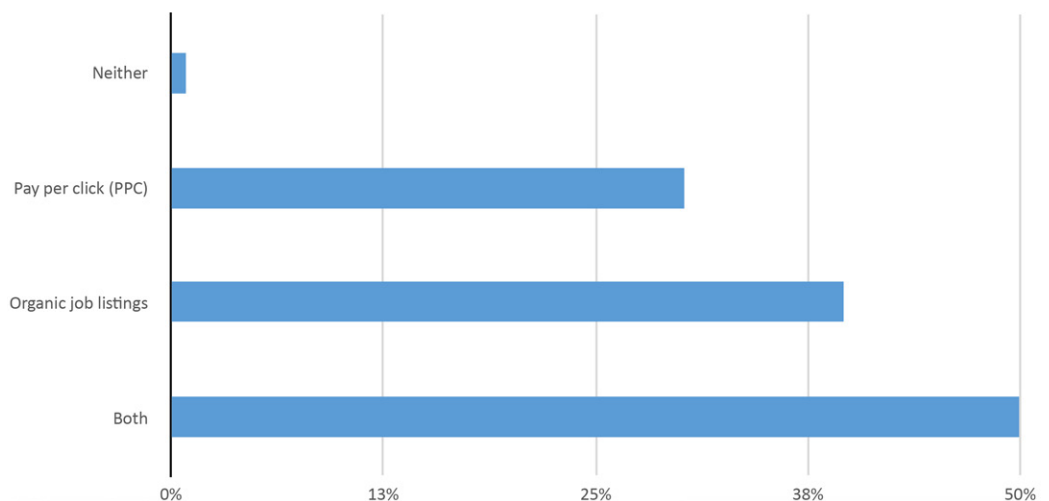
Do you currently use an aggregator (such as Indeed, Simply Hired, LinkUp, etc.) to either provide additional jobs on your site, or to crosspost your jobs to the aggregator site?



Do you plan to continue using an aggregator for the next 12 to 24 months?



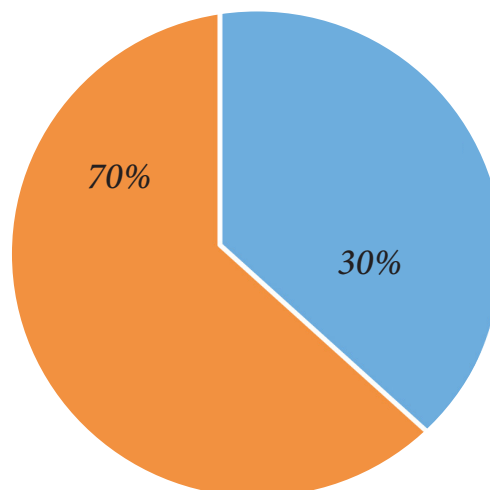
Which of the following aggregator services do you use to increase your traffic?



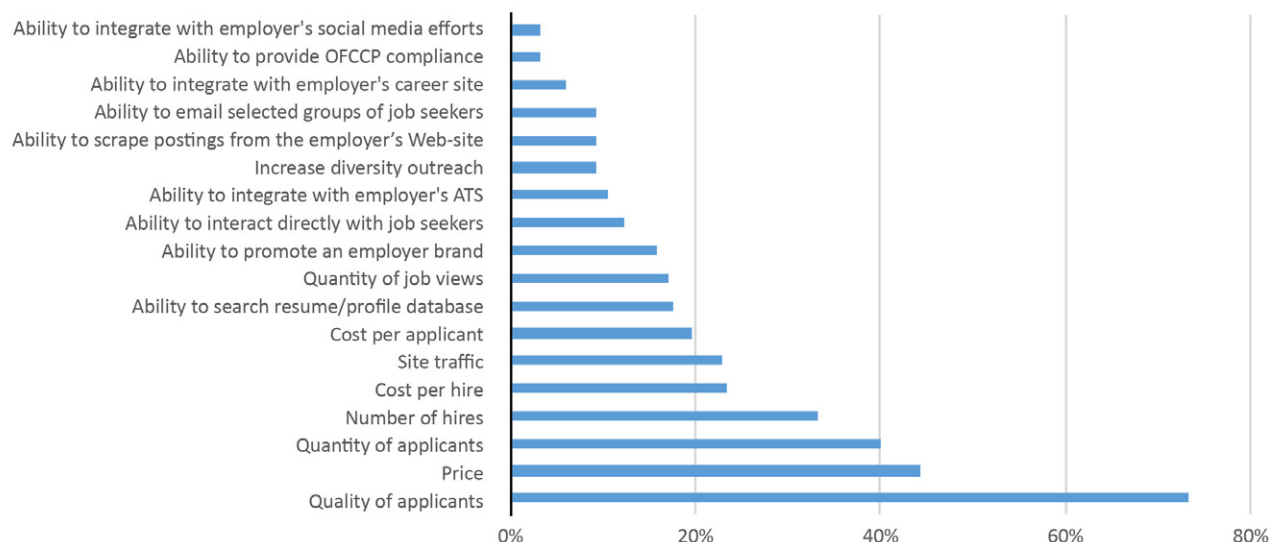
SURVEY RESPONSES

(collected between January and March, 2016)

Do you plan to change the job aggregator you currently use in the next 12 months?

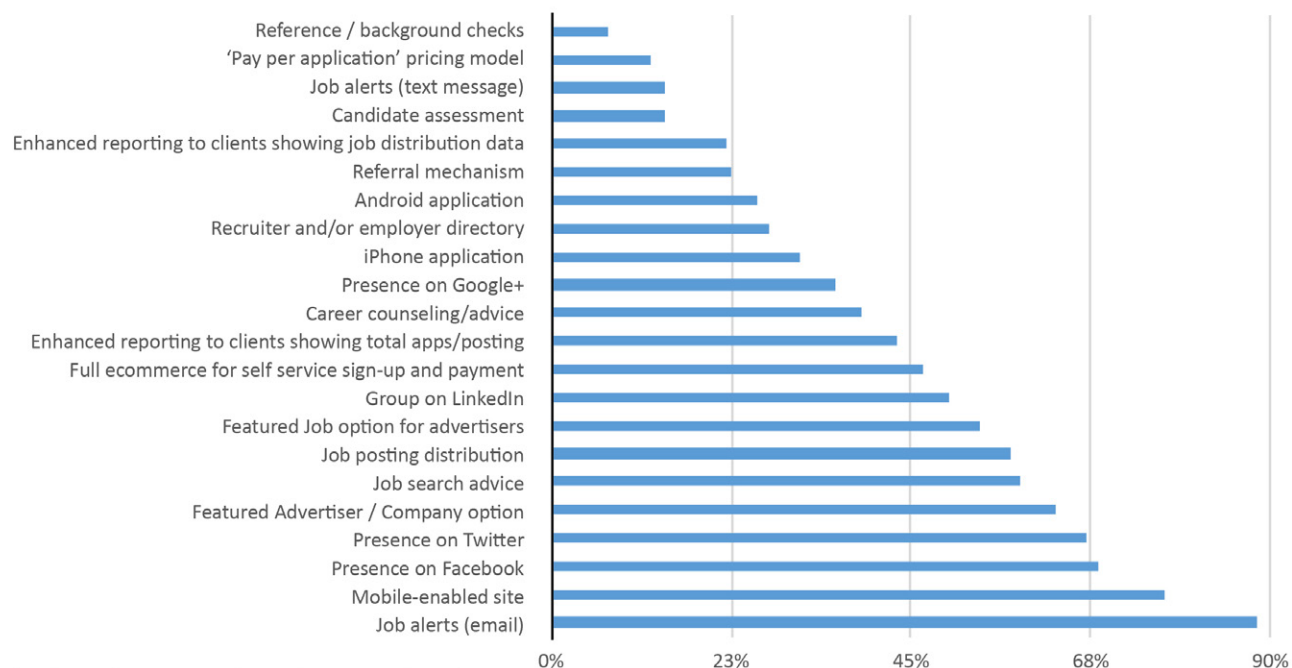


In general, which of the following criteria are most important to with regard to using or renewing your job board's services? (Select 3)

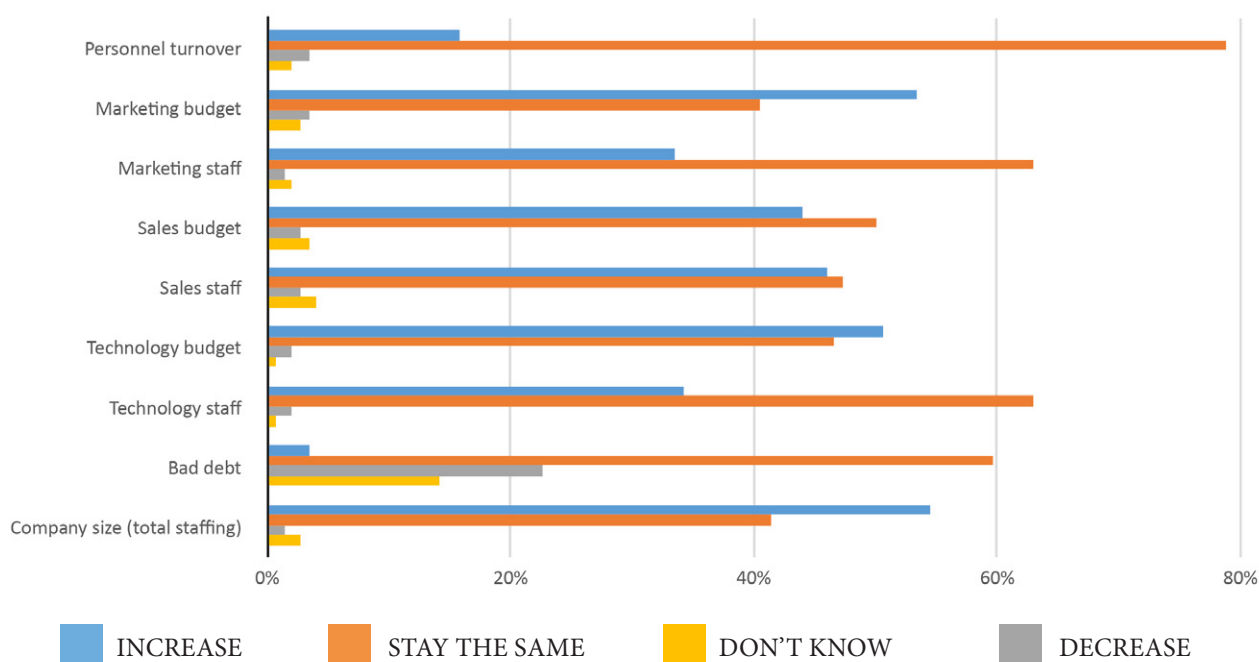


The top three criteria this year were exactly the same as last year. Among those criteria that saw a drop in importance were the Ability to promote an employer brand and the Ability to integrate with an employer's social media efforts.

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



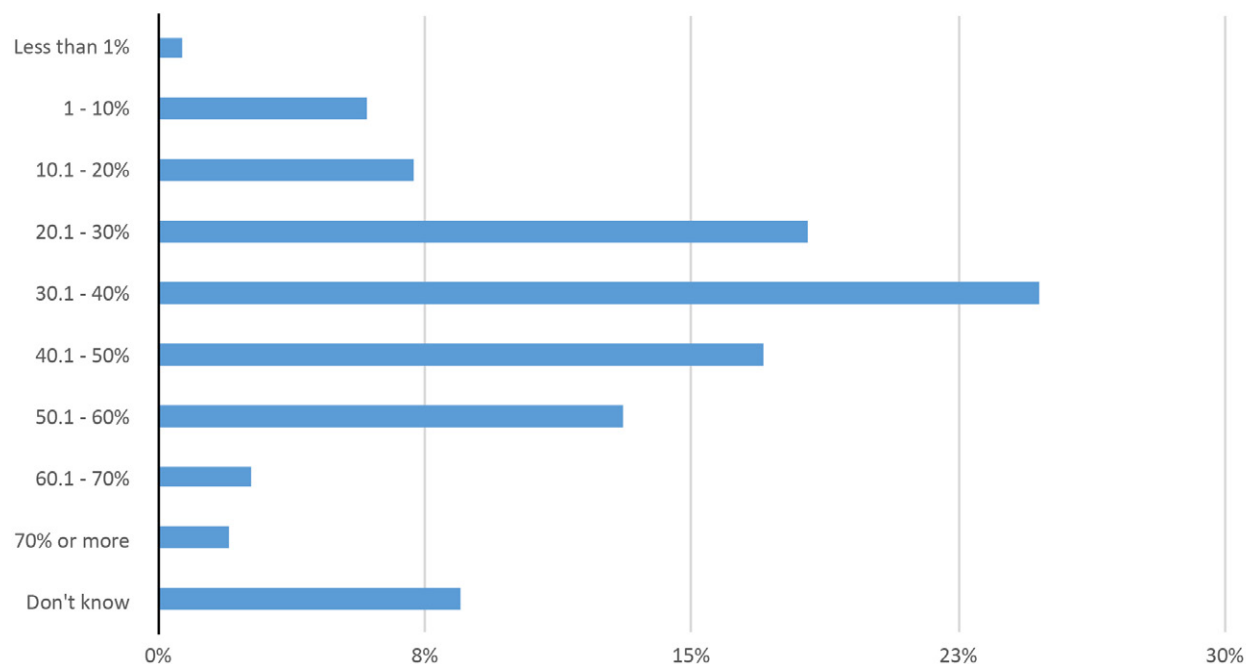
Over the next 12 months, how do you predict the following elements of your job board company to change?



SURVEY RESPONSES

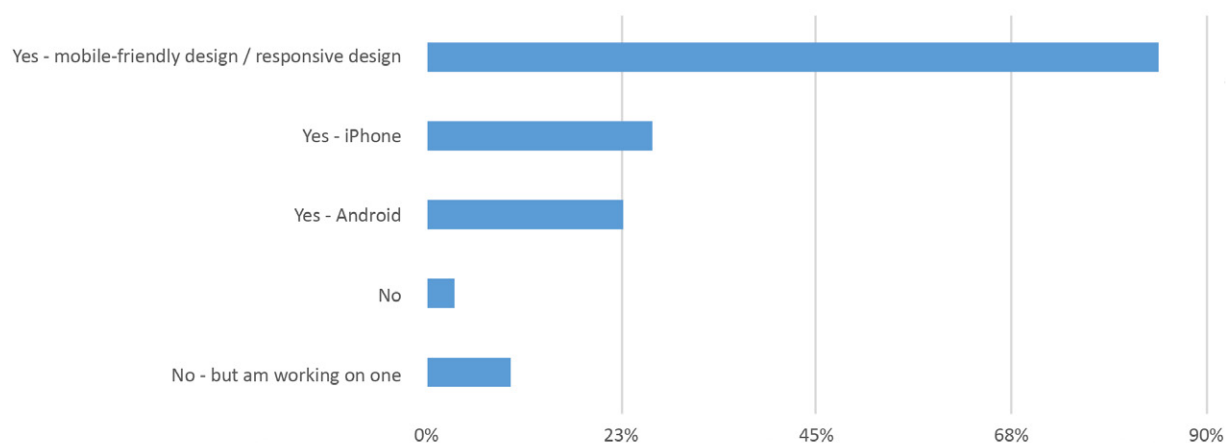
(collected between January and March, 2016)

What percent of your site(s) traffic comes from mobile?

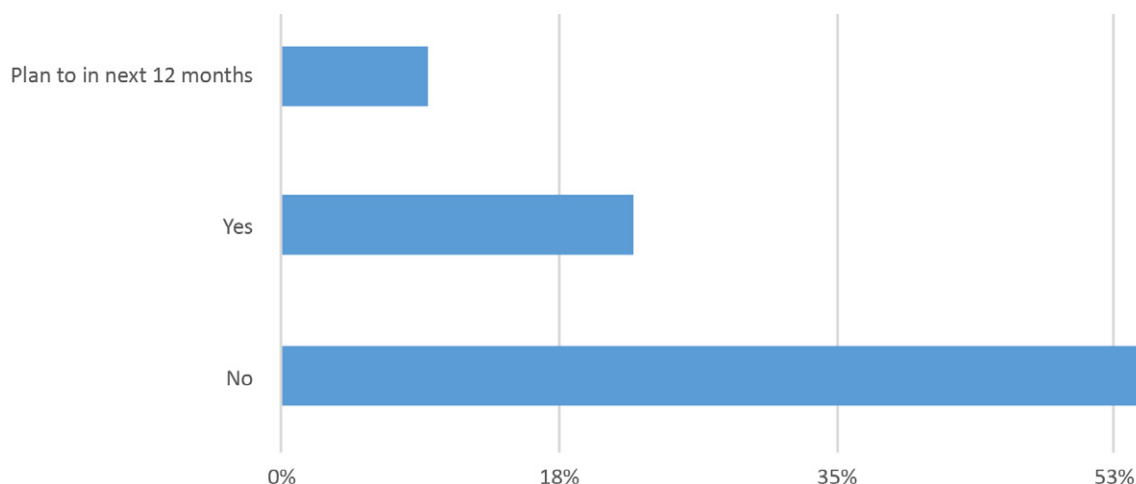


The number of sites reporting 30.1 percent or more of their traffic from mobile saw a dramatic increase from last year.

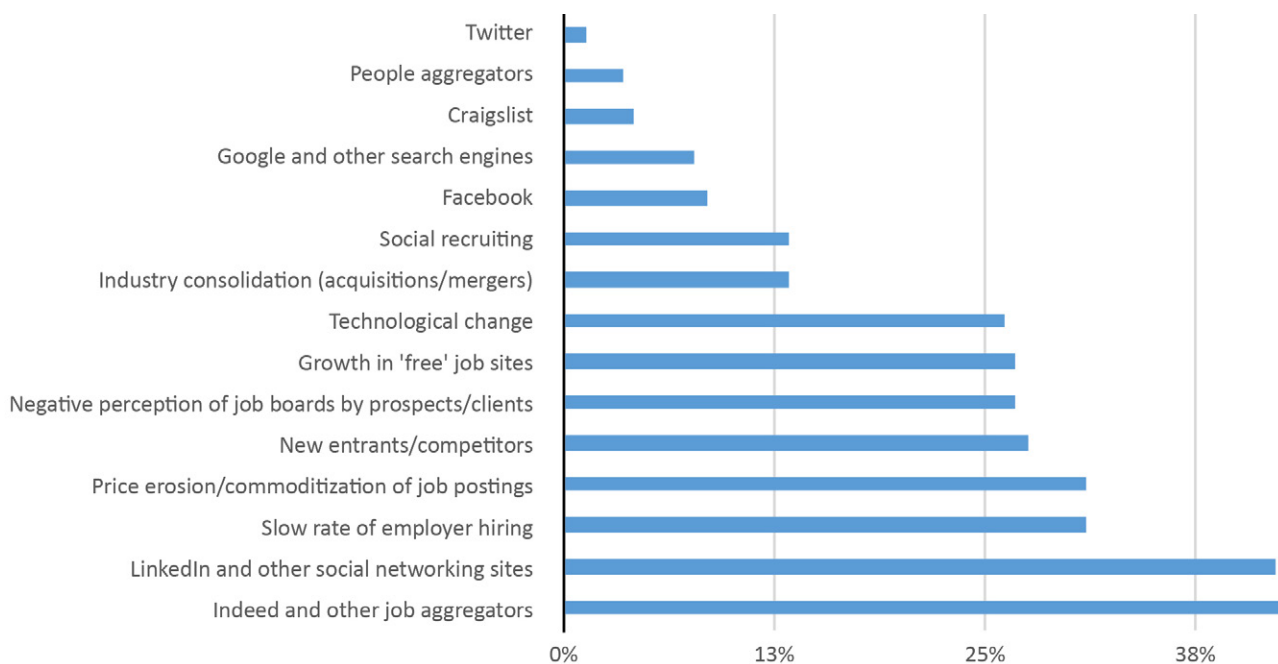
Do you have a mobile-friendly version of your site? (Check all that apply)



Do you offer a programmatic ad buying option?



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

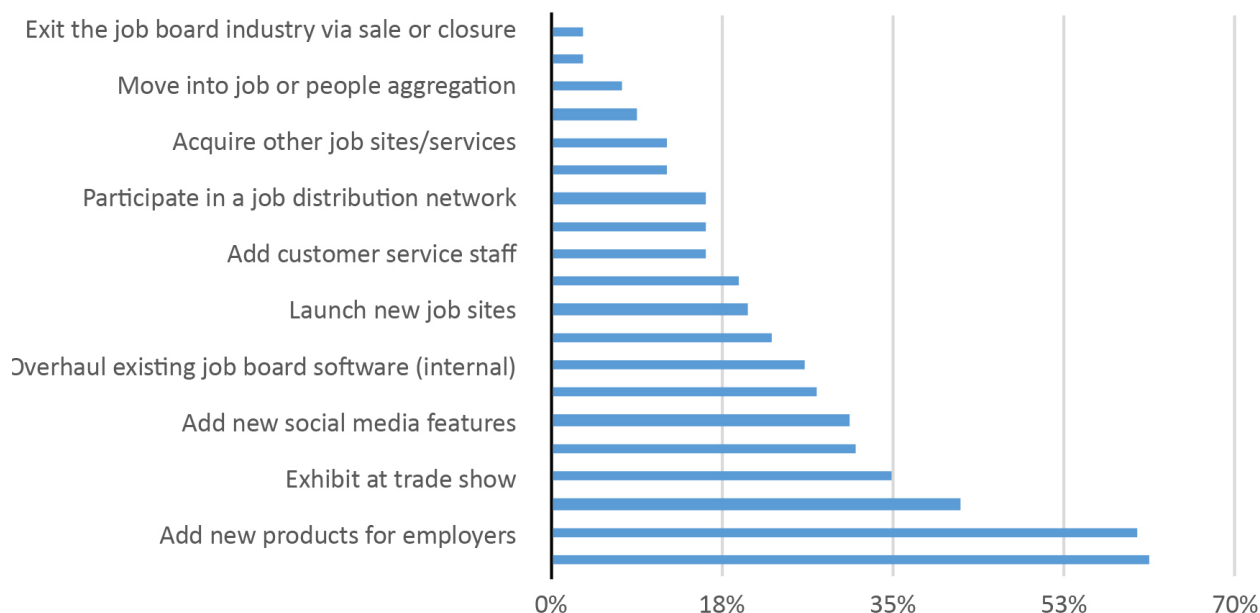


This year's top two threats were the same as those reported in 2015. However, the Slow rate of employer hiring jumped from 9th place last year to 3rd place this year, while New entrants/competitors, Social recruiting, and Google and other search engines all dropped in the rankings.

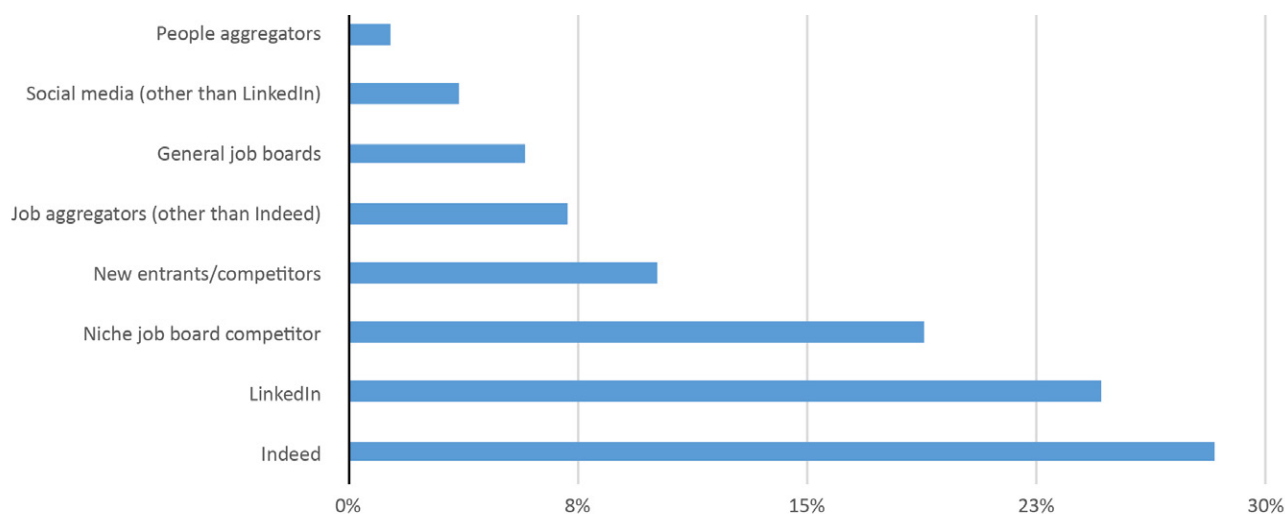
SURVEY RESPONSES

(collected between January and March, 2016)

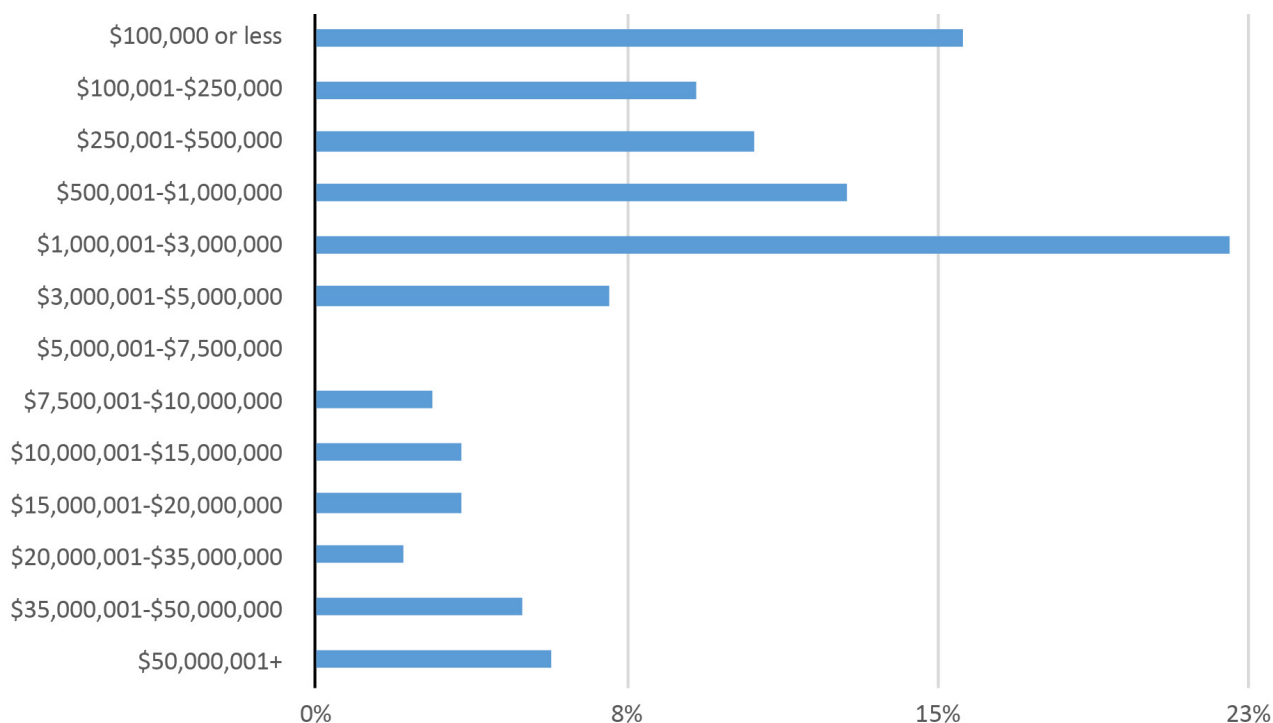
Which of the following actions are you planning (Check all that apply)



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

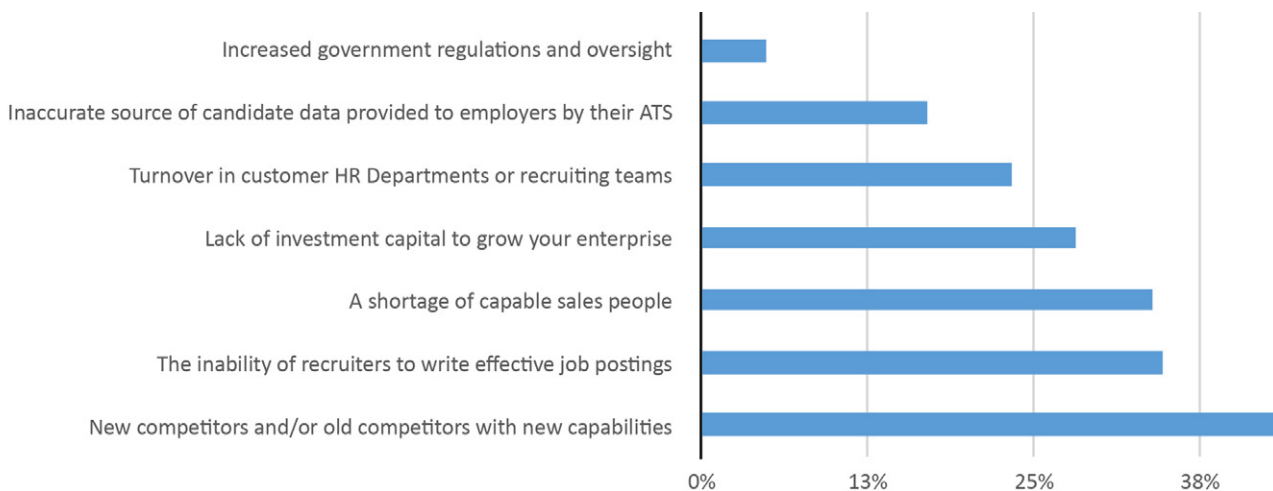


What is your best estimate of revenues for your site in the next 12 months?



This may be the best news from the Survey. The number of respondents reporting projected revenues of \$3-5 and \$1-3 million and \$500k to \$1 million were all up from last year. And perhaps no less important, the number reporting \$100k or less was down.

Which (if any) of the following challenges or impediments *significantly* affect your business during 2015-16? (Check all that apply)

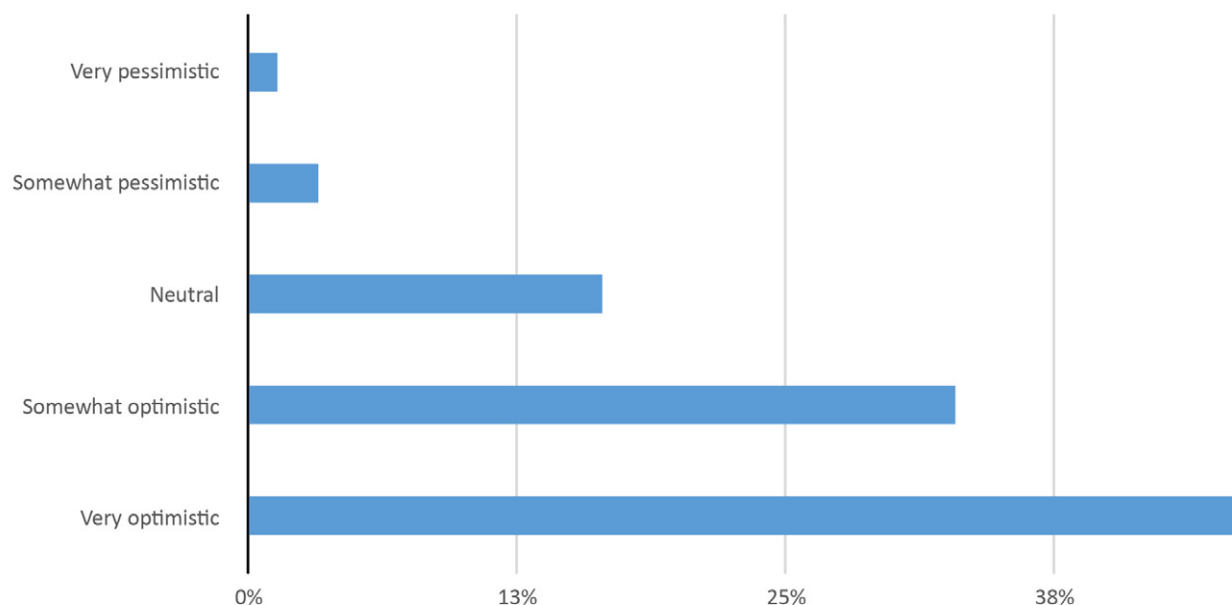


Both The inability of recruiters to write effective job postings and a shortage of capable sales people were up in 2016 over 2015, while the Lack of investment capital to grow your enterprise and Inaccurate source of candidate data provided to employers by their ATS were down.

SURVEY RESPONSES

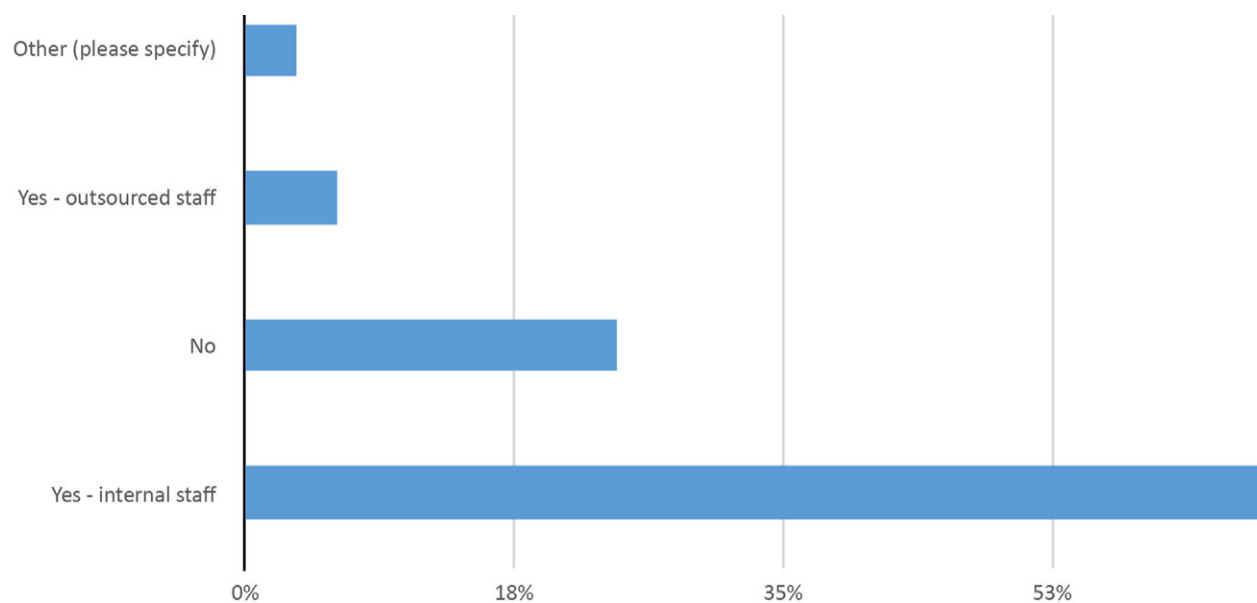
(collected between January and March, 2016)

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

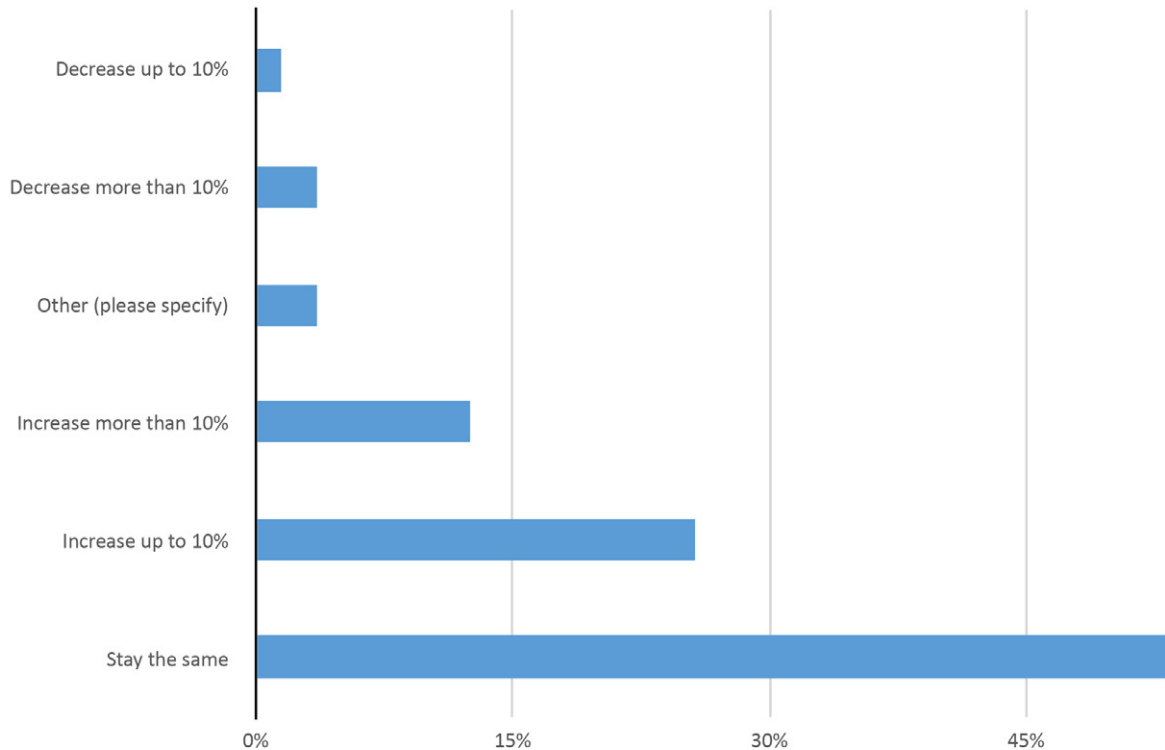


Though still #1 as it was in 2015, the Very optimistic assessment was down slightly this year, while the Neutral assessment was up significantly.

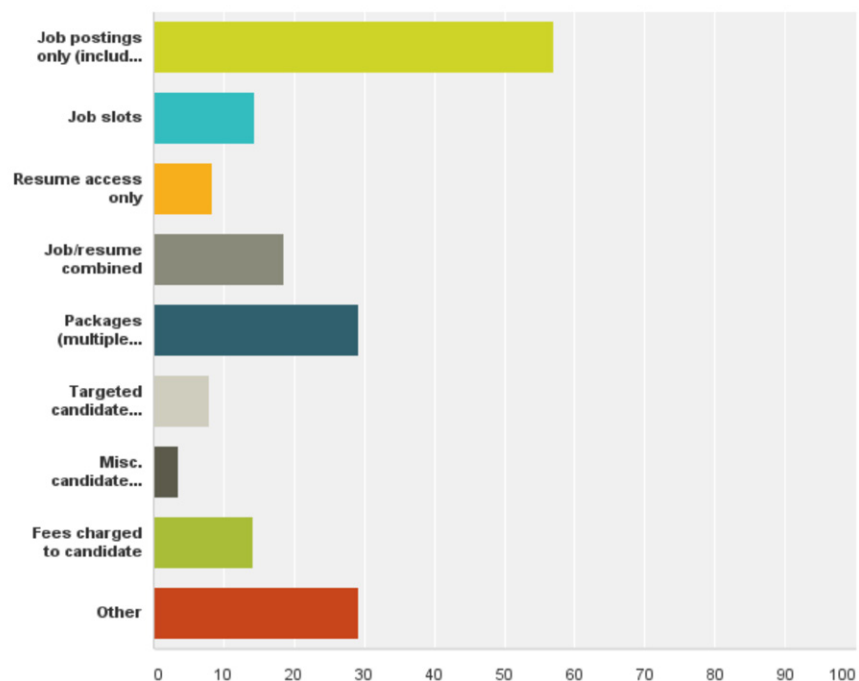
Does your site have a dedicated sales staff?



In 2016, which of the following best describes your overall rate structure for recruiting products and services?



Please enter the correct percentage for each revenue stream in your business (total should equal 100%):



Select participant comments

There seems to be a lot of VC money moving rather quickly through the industry. All of these new products launch with incredible promises of finally providing the “silver bullet” for recruitment advertising, but more often than not they do nothing more than muddy the waters for the market, and then disappear in a few years when the promised ROI isn’t brought back to the investors.

We are very excited at the prospects for obtaining new clients. We just need to improve our software by purchasing software to upgrade what we have in place.

We feel there are a lot of opportunities to grow our employer-related revenue.

Keeping up with technology and competition is ongoing. So many services looking for a slice of the action. Differentiation/USP is something we are looking at strongly.

Recently launched new version of site (now with a platform partner). Reaction has been favorable, and we continue to show good growth. But the media’s pessimistic view of the economy worries me, and the niche profession might suffer as a result.

Moving to a pay for performance, pay per application model which takes majority of risk from customer if advertising efforts and matching are focused on quality and relevancy.

Two years building, 100% increase in sales last year - growing client base/ growing rankings, retaining clients.

We’ve increased prices for the first time in 15 years, plus we have redesigned the site to increase likelihood of clients upgrading jobs at greater cost. So we’re hopeful revenues will increase, all things being equal.

We focus on the startup technology market and have concerns that the industry may slow down soon.

In a lot of ways, we’re on the edge. We expect to double revenues and be acquired within the calendar year but none of that is at all certain.



talenetic.com

Talenetic focuses on three areas: job board solutions and talent acquisition platforms for job boards, recruitment agencies, corporate recruiters and finally strategic consultancy for job boards and recruiters.



Job Board Solutions

Talenetic provides exceptional yet affordable job board technology, tailor made for today's challenge of a world heavily influenced by mobile and social media. It is based on a deep understanding of digital recruitment and honed through in excess of a total of seventy years experience of the management team in founding and running job boards and aggregators successfully in different industries and different parts of the world.

Recruitment Agencies

We believe that recruiters would perform even better, if they behaved like job boards when it comes to candidate attraction. Talenetic provides recruitment agencies with a comprehensive talent acquisition solution that rivals the best of breed job boards. It gets tailored to the recruitment agency's own requirements and can be integrated into existing systems and workflows.

Corporate Recruiters

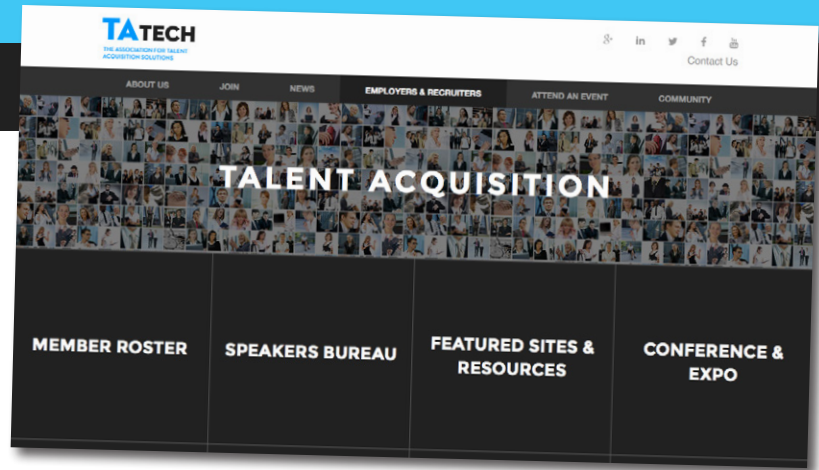
A lot of effort has been spent on making the recruiter workflow smoother and more effective. That is important - it is equally as important however, to spend the same amount of effort on making the candidate workflow smoother and more effective. We, at Talenetic, have specialised in solving this massive problem by understanding and combining both the candidate as well as the recruiter workflow. We have poured all our knowledge into building talent acquisition solutions that operate to the same high standard as market leading job boards and are working seamlessly in the mobile world and are fully integrated into the recruiter workflow.

TATECH

THE ASSOCIATION FOR TALENT
ACQUISITION SOLUTIONS

TATECH.org

TATECH serves the organizations that advance talent acquisition through technology-based products and innovative services.



We are the trade association for the worldwide community of commercial and not-for-profit organizations operating or providing:

- > Applicant tracking systems
- > Association career centers
- > Big data & analytics
- > Candidate screening & assessment
- > Career portals
- > Career site content & services
- > Career site functionality
- > Cloud-based solutions
- > Consultation
- > Digital classifieds
- > Interviewing service & support
- > Job & people aggregation
- > Job ad distribution
- > Job boards
- > Mobile apps
- > Onboarding platforms & services
- > Online ad buying & distribution
- > Recruitment marketing & advertising
- > Social media sites
- > Talent networks & communities

Collectively our members power or operate over 60,000 sites around the globe and offer products and services for every aspect of talent acquisition. As diverse as these enterprises and activities are, they are all linked by the two terms in our name. All of us in TATECH leverage state-of-the-art technology to promote talent acquisition that benefits both employers and recruiters and working men and women around the world. We are committed to their success and work at it each and every day.

For more information, please visit TATECH.org.

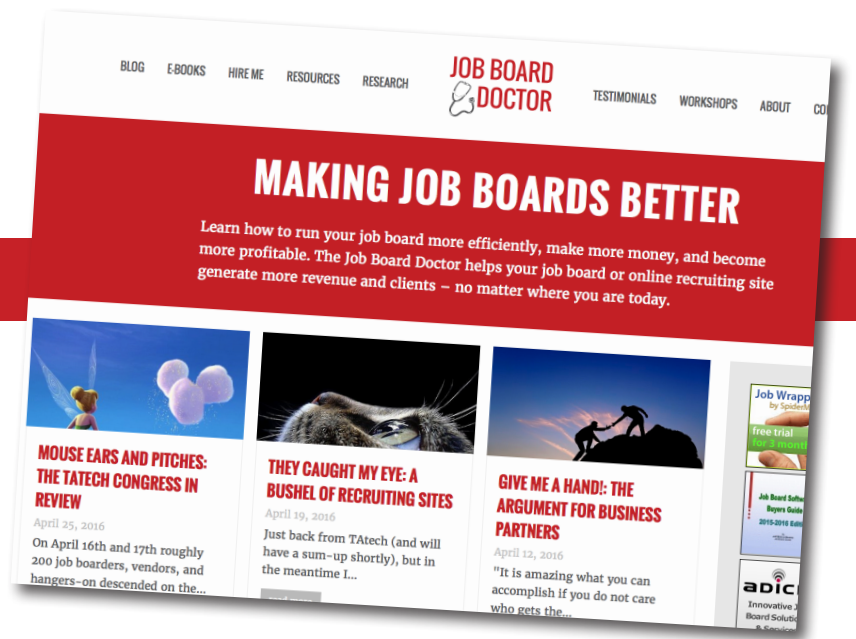


jobboarddoctor.com

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
- > 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 450+ 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.