

INDUSTRY RESEARCH 2026

Global Recruitment Site Platforms Survey

Comprehensive analysis of digital job advertising solutions, AI adoption, and industry outlook from 103 job board operators worldwide.

103

RESPONDENTS

68%

AI ADOPTION

13+

COUNTRIES



About This Survey



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Industry analyst and consultant providing independent research and strategic guidance for the talent acquisition technology sector.

2026 Survey Redesign

This year's Global Recruitment Site Platforms Survey has been completely redesigned to provide deeper insights into the evolving job board industry. Key improvements include:

Expanded traffic source analysis with volume AND qualified attraction.

New product revenue ranking to identify top performers

Actionable recommendations for traffic and revenue diversification

Special Thanks

For support with survey partnership and distribution

Job Boards



Connect

Industry Events & Community

jobboardsconnect.com



Leading Job Board Software

www.jobiqo.com

Thank you for helping make this research possible.



Key Findings

1 AI dominates the conversation — 68% are testing or have integrated AI tools

2 Job posting volumes are declining — 48% report flat or declining YoY volumes

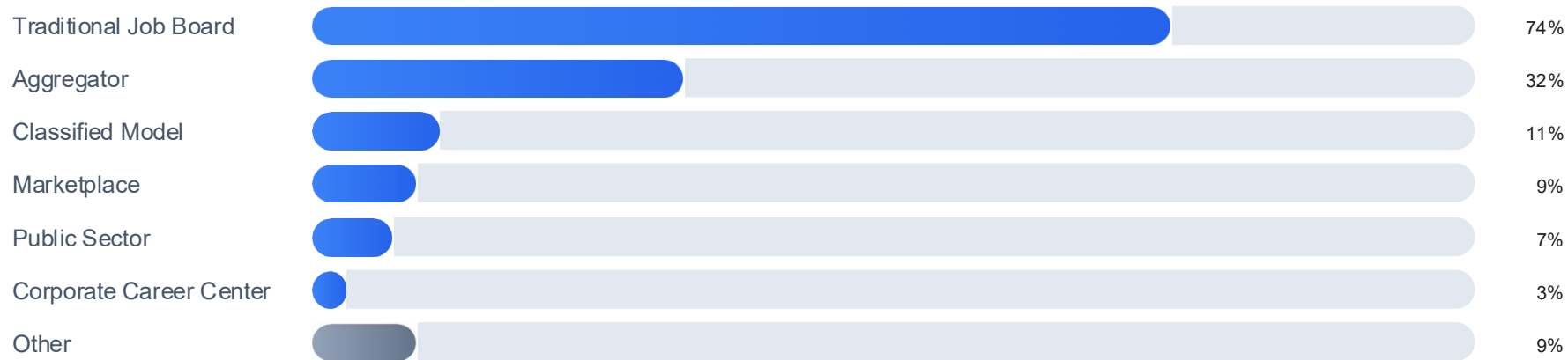
3 Quality over quantity shift — Industry moving toward match accuracy metrics

4 Cautious optimism prevails — 51% optimistic about the next 12 months

5 Direct sales remain dominant — 43 cite direct sales as primary revenue driver

Business Types

What type(s) of digital job advertising solution does the business offer?

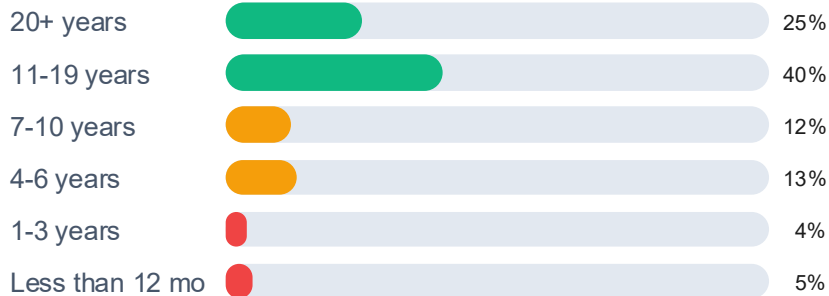


Note: Respondents could select multiple types.

Experience & Team Size

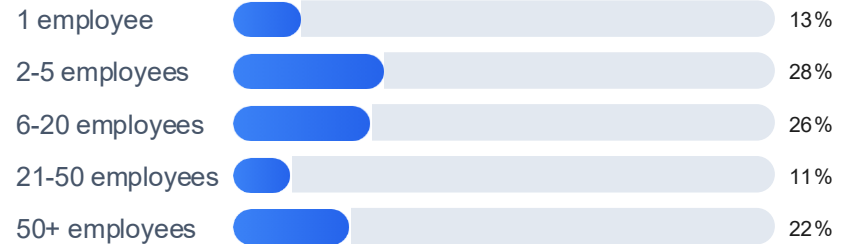
Years in Business

65% have 11+ years experience



Employee Count

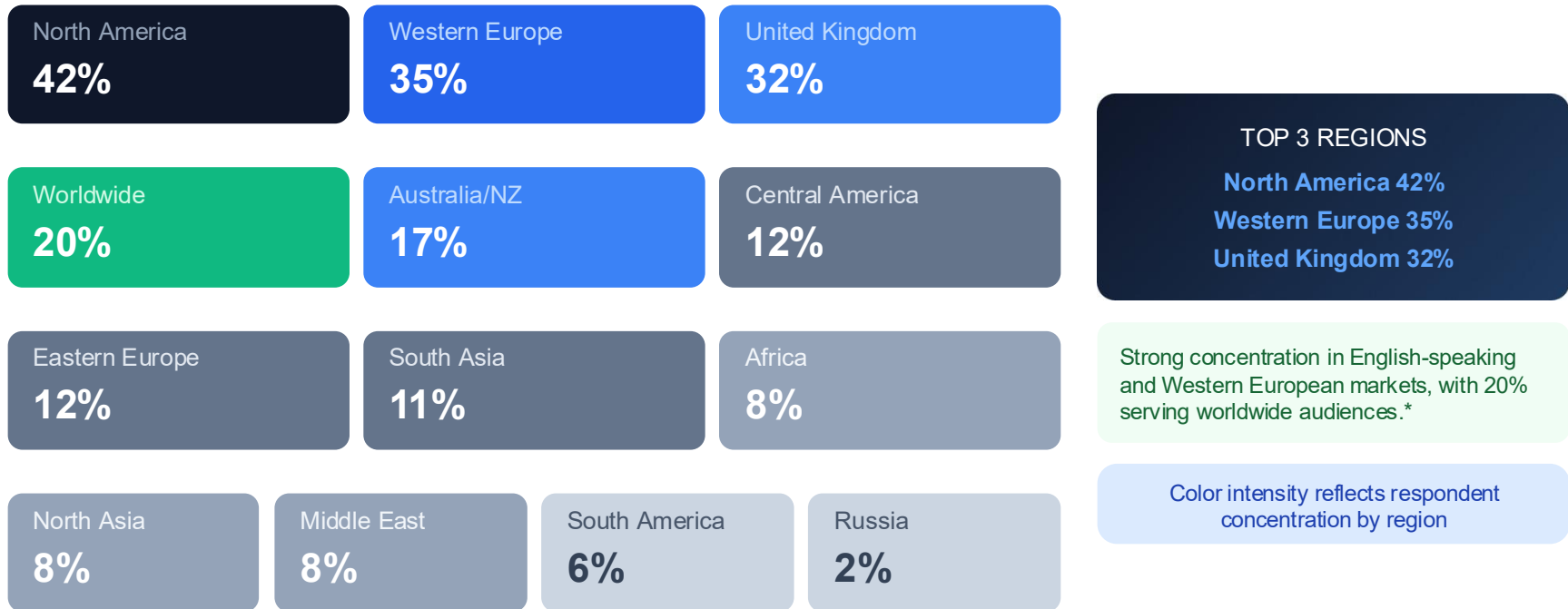
66% have 20 or fewer employees



Most job boards operate as lean organizations with small teams

Geographic Reach

Respondents serve 13 regions worldwide



*Broader representation across non-English speaking and non-Western dominant markets is a recognized opportunity for future survey deployment.

Target Audience

Audience Type

Nearly even split between general and niche focus

49%

General Audience

48%

Targeted Niche

2%

Students/Alumni Groups

Niche Breakdown

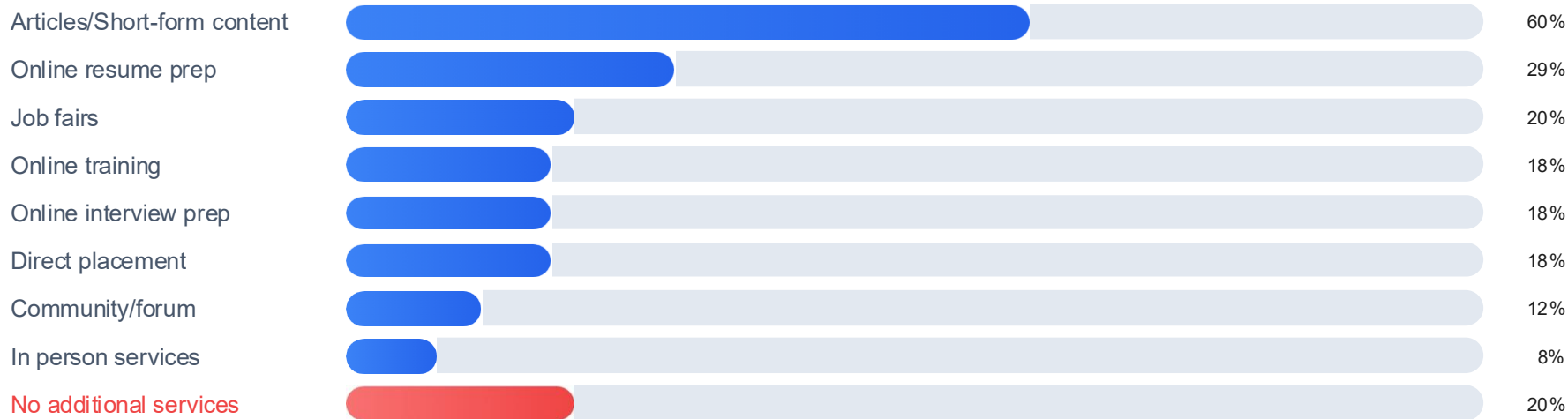
Of those targeting niche audiences



Industry-specific niches (e.g., healthcare) lead, followed by role-specific (e.g., engineers)

Job Seeker Resources

Additional services offered to job seekers beyond job listings



Note: Respondents could select multiple options.

Daily Job Volume

Average number of active jobs listed on any given day



57%
have under 5,000 daily jobs

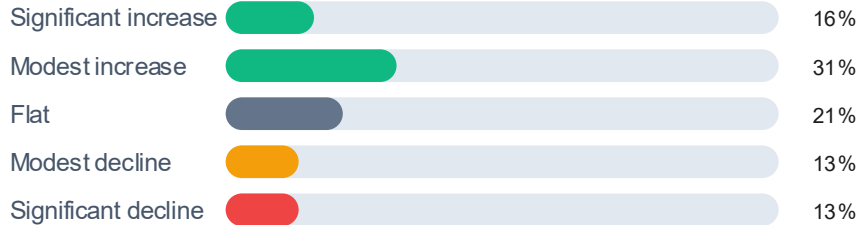
13%
are large aggregators with 5M+ jobs

Range reflects wide mix of niche boards and large aggregators

Market Performance (YoY Changes)

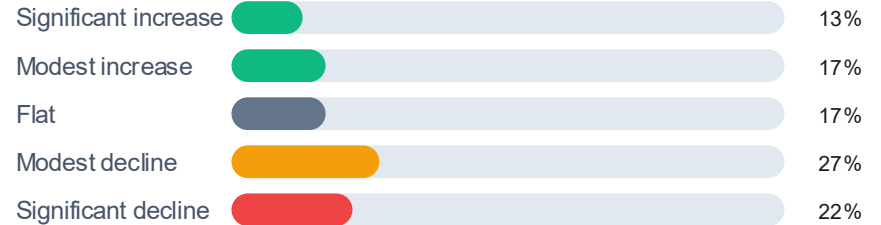
Job Seeker Activity

47% report growth in traffic



Job Posting Volume

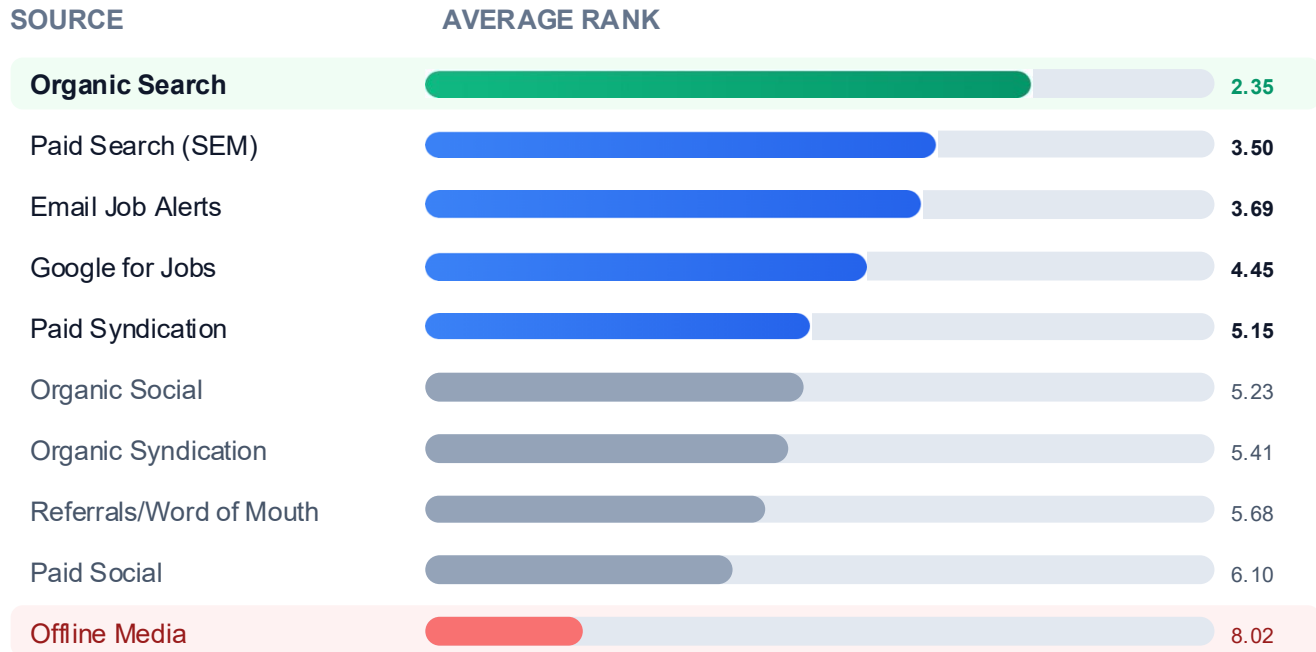
48% report flat or declining



The Volume Gap: Divergence between job seeker activity and posting volume suggests more candidates competing for fewer positions.

Traffic Sources by Volume

Respondents ranked sources from highest volume (1) to lowest volume (10)



TOP VOLUME DRIVER

Organic Search

Avg rank 2.35 of 10

Key Insights

- SEO remains the dominant traffic source
- Paid search and email alerts nearly tied
- Offline media ranks last for volume

Scale: 1 = highest volume, 10 = lowest volume

Methodology: Average rank calculated as weighted mean of all rankings per source. Lower average = higher volume. Sources with N/A responses excluded from that source's calculation.

Traffic Sources by Quality

Respondents rated each source as Higher Quality, Average Quality, or Lower Quality



TOP QUALITY SOURCE

Email Job Alerts

72% rate as higher quality

Key Insights

- Email alerts: high volume AND quality
- Referrals underused but high quality
- Paid syndication: lowest quality rating

Note: Google for Jobs ranks 4th for volume but only 36% rate it higher quality

Methodology: Percentage of respondents who rated each source as "Higher Quality" out of those who provided a rating. N/A responses excluded.

Traffic Source Recommendations

Expansion opportunities based on adoption rates and quality ratings

EXPAND FIRST - High Quality, Underutilized

Paid Search (SEM)

28% not using | 45% rate high quality
Strong ROI, 2nd best volume driver

Referrals/Word of Mouth

17% not using | 59% rate high quality
Low-cost, high-trust channel

CONSIDER TESTING - Moderate Opportunity

Google for Jobs

28% not using | 36% rate high quality
Free traffic - worth testing

Organic Syndication

43% not using | 30% rate high quality
Vet partners carefully

OPTIMIZE - Already Well Adopted

Email Job Alerts

89% using | 72% rate high quality
Best-in-class - maximize it

Organic Search (SEO)

92% using | 67% rate high quality
Universal - invest in optimization

DEPRIORITIZE - Low Quality, High Cost

Paid Syndication

46% not using | Only 17% rate high quality

Offline Media

58% not using | Only 26% rate high quality

KEY TAKEAWAY

Paid Search and Referrals offer the best expansion ROI - high quality ratings but still underutilized by many job boards.

Quick Wins

1. Launch referral program
2. Test Google for Jobs
3. Audit SEM campaigns
4. Double down on email alerts

Based on N/A response rates (sources not used) cross-referenced with quality ratings.

Product Revenue Ranking

Products ranked by gross revenue generation over prior 12 months (1=highest, 7=lowest)

PRODUCT	REVENUE SCORE (higher = more revenue)	ADOPTION
Duration-Based Postings	1.83	77%
Subscriptions (Unlimited)	2.11	62%
Duration-Based Slots/Seats	2.29	39%
Pay Per Click (PPC/CPC)	2.43	49%
Pay Per Application (PPA/CPA)	3.24	48%
Pay Per Hire (PPH/CPH)	4.64	23%
Job Seeker Products/Solutions	4.84	31%

TOP REVENUE DRIVER

Duration-Based

77% offer | Highest revenue

Key Insights

- Traditional posting models still dominate revenue generation
- Subscriptions strong despite lower adoption
- Performance models (PPA) underperform

Slots/seats model scores high (5.71) but only 39% offer it

Methodology: Score is weighted average of rankings (7=ranked #1, 1=ranked #7). Adoption = % of respondents offering this product

Client Types & Revenue Drivers

Client Types

Who generates revenue for your solution?



Revenue Growth Drivers

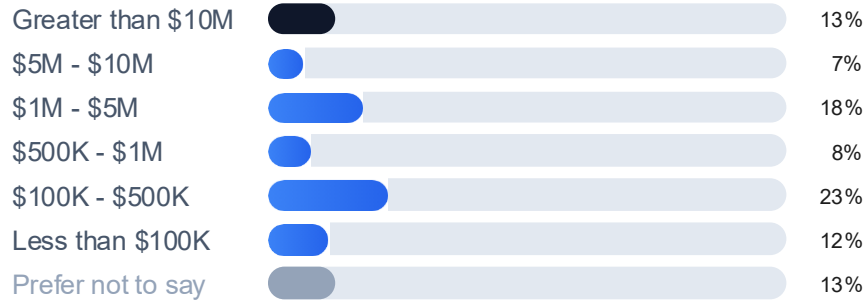
Most significant drivers (choose up to 2)



Direct sales dominates, but AI tools emerging as a growth driver

Revenue Profile

Annual Revenue (USD)



Revenue from Job Advertising

% of total business revenue



HIGH RISK: REVENUE CONCENTRATION

48% derive 81-100% of revenue from job advertising

When hiring slows, these businesses face significant revenue disruption. Diversification into subscriptions, performance pricing, and partnerships can reduce this vulnerability.

48%
at high risk

Revenue Diversification Recommendations

Employer-focused strategies to build resilience when job posting volume fluctuates

THE RISK: Heavy Dependence on Job Advertising

48% of job boards derive 81-100% of revenue from job advertising alone. When hiring slows, these businesses are most vulnerable.

POSSIBLE EXPANSION: Underutilized Employer Products

Pay Per Hire (PPH)*

Only 23% offer this model
Premium pricing, aligned incentives with employers

Pay Per Application (PPA)

48% offer this model
Performance-based, scales with qualified delivery

Subscription Model

62% offer | Room to grow
Predictable recurring revenue, smooths cycles

Slots/Seats Model

Only 39% offer this model
Stable revenue, enterprise-friendly packaging

GROW: Partnership and Channel Revenue

Recruitment Agency Partnerships

21 cite as top growth driver
White-label, reseller, or referral programs

New Products/Features

16 cite as top growth driver
Employer branding, analytics, ATS integrations

PROVEN: Top Revenue Growth Drivers

43

Direct Sales

21

Partnerships

18

Organic SEO

16

New Products

8

AI Tools

RESILIENCE STRATEGY

Reduce job ad dependency below 50% through subscription models, performance pricing, and partnership channels.

Action Items

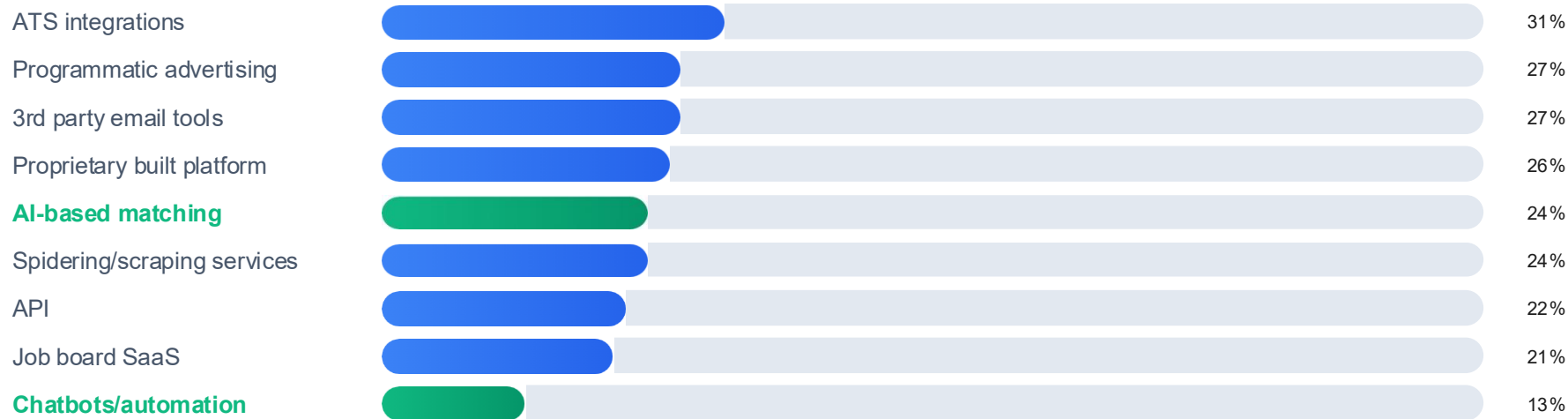
1. Launch subscription tier for SMBs
2. Test pay-per-hire with key accounts
3. Build agency partner program
4. Add employer branding tools

**PPH and PPQA create significant reward opportunities for job boards, but also considerable risk.*

These models will work for certain boards but should not be considered universally.

Technology Stack

Technologies supporting digital job advertising solutions



Note: Respondents could select multiple technologies

AI Adoption



SURVEY RESPONSES ARE NOT RECOMMENDATIONS

Information below is based on survey responses and use cases should not be construed as recommendations from the Job Board Doctor for AI implementation.

Current AI Status

68% are integrated or testing AI

28%

Deeply Integrated

40%

Testing

19%

Considering

11%

No AI Usage

Top AI Cited Use Cases

Candidate Matching

Improving accuracy to increase engagement and application quality

Job Description Assistance

AI-powered tools to help employers write better job descriptions

Automated Engagement

Chatbots and AI assistants to guide candidates through applications

Relevance Rating

AI systems to score and rank candidate-job fit for employers

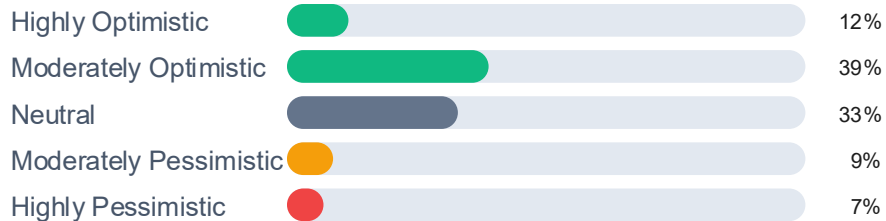
FROM THE SURVEY

"Helping jobseekers match and find jobs on our board that would be a good fit for them by searching descriptions instead of just the job titles."

Business Outlook

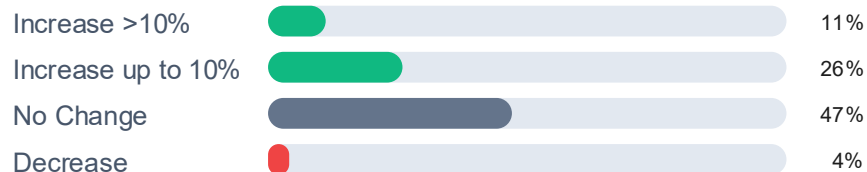
12-Month Optimism

51% are optimistic



Pricing Strategy

37% plan increases; 4% decreases



Pricing confidence suggests continued value perception

FROM THE SURVEY

"AI and automation are reshaping job advertising, but not every organization will be ready to fully adopt these tools right away. The need for hyper-personalization in campaigns will remain strong."

Major Trends (Next 2-3 Years)

AI Pervasiveness

AI tools for matching, filtering, interviewing will become ubiquitous.

Quality Over Volume

Industry shifts from clicks to outcome-based metrics.

Performance-Based Pricing

CPA and outcome-based models grow as employers demand accountability.

AIO and SEO

AI-optimized content becomes critical as search traffic declines.

Consolidation

Expect continued M&A activity and job board mergers.

Tech Giant Competition

LinkedIn and major platforms continue capturing market share.

FROM THE SURVEY

"We expect the industry to shift from a 'volume clicks' model to one focused on quality of match. Platforms that can use data, matching algorithms, and behavioural signals to ensure the right people see the right roles will win."

Conclusions

68%

AI ADOPTION

51%

OPTIMISTIC

37%

PRICE INCREASES

Winners in the next 2-3 years will:

- 1 Successfully integrate AI effectively and fairly
- 2 Shift metrics from clicks to outcomes and demonstrate qualified candidate attraction
- 3 Build proprietary candidate data and relationships
- 4 Double down on niche expertise rather than competing on volume

The Time to Act is Now

Those who act decisively now will thrive; those who wait risk irrelevance as the industry consolidates and evolves.