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Job Board Service Differentiators 2016

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Job Board Service Differentiators 2016

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Introduction

The Job Board industry began in the early 1990s, and moved to the web in the mid-1990s. Since its inception, it has become a standard part of most employers' recruiting tool kit. But what makes one job board service different from another? Is it simply site traffic, services offered, or are there other differentiators as well?

This report will discuss the core features of Job Boards based on our analysis of the largest globally, and then delve into the additional services and features that differentiate one site from another. We will then examine what types of extended services may be useful to a particular employer – and why.

Finally, we will look at performance metrics, services, and targeted market segments for the largest job board brands – sites that span the globe and most major employment markets. In doing so, we will provide you with insight into how this critical recruiting tool works, and how you can make the most informed buying decision for your organization.

Much of the data in this report is derived from a survey conducted among the world's largest Job Boards between March and April 2016. We believe this report is the first analysis of its kind.

The global Job Board market is estimated to be worth USD 10 to 20 billion in annual revenue. The organizations surveyed in this report represent approximately USD 8.9 billion in annual revenue so represent a significant portion of the entire market.

Trends in the Job Board industry

Job Boards are evolving – and expanding

Since their birth in the 1990s, Job Boards have steadily expanded their reach – from initial efforts in North America and the UK, to their current global stature. It is telling that the first eight companies listed in our *Largest Job Boards Globally 2016* report are operating in multiple countries. As Job Boards have grown, so too have their offerings - ranging from the traditional paid job-posting model, to pay per applicant and/or click, and even to staffing 'shortlists'.

These trends are playing out in the major Job Boards' strategies, but are also driving the development and launch of new companies – some of which have been acquired by major Job Boards. For example, TalentBin, a people aggregator, launched in 2012, was acquired by Monster in 2014 and Bright, a candidate matching service, was acquired by LinkedIn in 2014.

At the same time, the last five years have seen a veritable explosion in new sites and services, driven both by improvements in technology and in venture capital investments. As we look at the global market, some key trends are evident:

- Job ads have become commoditized, both as a result of the increase in Job Boards and the expansion of job aggregators (such as Indeed and Jobs2Careers). The price pressure caused by this has resulted in an increase in non-posting products as well as subscriptions and packages.
- Predictive recruitment analytics have become feasible as a result of improvements in data technology, and several Job Boards (such as CareerBuilder with their acquisition of EMSI) are providing the first generation of these products to aid employers in determining when and where to place their job ads.
- Mobile usage by candidates continues to grow – from an average of 15% of total traffic in 2012, to an average of 40% in 2016. Some sectors such as retail and hourly report usage as high as 70%. [Source: 2012, 2016 Global Job Board Trends Survey, *IAEWS/JobBoardDoctor*]
- The skilled working population in most developed nations is decreasing, which is driving growth in branding efforts by organizations aiming to be the 'employer of choice'. Glassdoor's entire business model revolves around the concept of employer branding.
[\[http://www.reuters.com/article/us-usa-economy-labor-idUSKCN0PU07J20150720\]](http://www.reuters.com/article/us-usa-economy-labor-idUSKCN0PU07J20150720)
- Training is a key part of many Job Boards' strategy for extending their reach beyond pure job postings and resume search. LinkedIn's purchase of Lynda in 2015 is a notable example of this.

A brief history of job posting

From innovation to commodity

When Job Boards first burst on the scene, they were viewed as little more than irritants to print media that had long dominated the classified recruiting industry. Two decades later, it is clear that Job boards were significant disruptors, allowing employers to reach vast geographic audiences with relative ease – and at lower cost.

Job postings also brought two additional attractive features: an essentially unlimited amount of room for text (although this was usually arbitrarily limited by the Job Board), and a direct response mechanism – first via a published email address in the posting, and later via an ‘Apply’ button provided by the Job Board.

Job Board pioneers such as Monster and Jobserve also brought a new metric to the recruiting industry: the number of ‘hits’ or views a job posting would receive. This traffic-based marker in turn drove expectations by employers for ever-increasing response for their job ads.

As Job Boards proliferated, so too did the competition for recruitment dollars. As a result, job postings began to experience price pressure. This was accentuated in the mid-2000s by the advent of job aggregators such as Indeed, whose pay-per-click (PPC) model drove down the cost of candidate responses.

In addition to job postings, Job Boards have long been in a race to accumulate candidate resumes, which in turn spawned the need for more sophisticated search tools. In 2008, Monster acquired Trovix, a semantic search engine, so that employers had an effective tool for poring through millions of resumes.

At present, many of the major boards provide a variety of job posting payment models. Most also bundle job postings into larger packages of recruitment services, thus essentially making it almost impossible to determine the ‘cost’ of a job posting.

A key feature of the business model of early Job Boards was the fact that employers were charged for posting job ads while jobseekers were not charged for accessing or applying for jobs. While this model still prevails, Job boards have faced commoditization for their core services during the past decade. For example, in Monster’s most recent quarterly results, they identified price competition as a key factor in their lowered revenues (<http://seekingalpha.com/article/3971804-monster-worldwide-mww-timothy-t-yates-q1-2016-results-earnings-call-transcript?part=single>). In response to this commoditization, Job Boards have rolled out new services designed to reach deeper into the employer’s recruiting process. CareerBuilderOne combines an applicant tracking system (ATS), employer branding, contingent search, and candidate screening services into a single platform. Other global sites such as Indeed and Monster have responded in kind by adding similar services. Some sites, such as LinkedIn and TheLadders, charge candidates for certain services, such as improved job access or searching. However, this model is still in the minority.

Core functionality

Job Board basics

Almost all Job Boards contain certain core features although how these are implemented can vary widely (although aggregators may lack even these features). For candidates, these include:

- Resume and/or profile posting
- Job search
- Job alert (job search results emailed to candidate)

For employers, basic features typically include:

- Job posting
- Resume search
- Featured job and/or company ad to enhance profile

From these relatively straightforward options, however, springs a fair amount of variation. Some sites offer job and resume search engines utilizing Boolean logic [i.e., using the search terms AND, OR, and NOT to produce relevant search results], whereas others employ semantic search – a methodology that focuses on search item context and ‘natural’ language.

Ads are often delivered in a variety of ways:

- As the result of a candidate search
- Positioned at the top of all searches for a premium fee
- In locations outside the search results – for example, in sidebars on career content pages

Job Boards also differ in how they handle resumes:

- Some sites focus primarily on profiles, which are designed for specific industries or professions, with customized fields
- Some sites parse resumes as they are uploaded, allowing employers a more powerful search capability

Extended functionality

In addition to the basic functions listed above, most of the largest 30 Job Boards (ranked by revenue) offer additional features to enhance an employer's recruiting efforts. Some of these, such as an employer directory, are simply extensions of the basic functions. Others, such as candidate assessment and social media presence, provide another level of services beyond the basics.

The extended features that were identified from among the world's largest 30 Job Boards are as follows:

- Job alerts (text message): email or text messages sent to a candidate with jobs matching his/her criteria
- Mobile-enabled site: the Job Board offers a site design that is responsive (displaying well on multiple screen sizes), thus allowing all site functions to be accessible on any device
- iPhone and/or Android apps: designed to provide an optimized mobile experience of the Job Board for the candidate; some feature special functionality such as resume storage
- Presence on social media (Facebook, LinkedIn, Twitter, Google+): the Job Board provides a specific set of services and visibility on social media channels (such as a Group on LinkedIn or a Company Page on Facebook), allowing employers to reach candidates specific to these media
- Recruiter and/or employer directory: the Job Board provides a specific listing (or set of listings) that allows candidates to easily locate specific employers and recruiters on the site; typically will link to the employer's profile page
- Job posting distribution (beyond the core Job Board): the Job Board will post the employer's jobs to other online locations, including job aggregators, community sites, social media, and other places where relevant candidates may be found
- Career counseling & job search advice for candidates: A variety of career services are provided to candidates, including information on resume creation, conducting a job search, identifying potential employers, and conducting an interview. Most of these candidate services are usually provided free of charge.
- Enhanced reporting to employers showing total applications/job posting: In the Job Board's Employer section, online reporting is provided for a specific employer account showing how many candidates have applied for a particular job. Some Job Boards also provide systems that allow employers to track candidate activity and communicate with them.
- Enhanced reporting to employers showing job distribution data: In the Job Board's Employer section, online reporting provides for a specific employer account that shows where jobs have been distributed. Some Job Boards also provide activity reports for these, with information on the number of job views and applications.
- 'Pay-per-application' pricing model: Instead of charging the employer for a job posting or a click on a job posting, the Job Board charges for each time a candidate actually applies for the job via the site's apply process.
- Candidate assessments: The Job Board provides some type of candidate assessment – either regarding general aptitude or for specific skills – and then reports the assessment data to the employer (usually as part of their dashboard).

Extended functionality (continued)

- Referencing/background checks: The Job Board provides candidate reference and background checks for specific candidates, usually via a 3rd party supplier.
- Predicting hiring and recruiting analytics: The Job Board provides analysis of candidate behavior on the Job Board to help employers identify different ways to improve their hiring efficiency, including job posting content modification, day and time specific job posting, and identification of candidate pools by geography.
- Presence of an "online community" of candidates: The Job Board maintains curated groups of candidates (usually organized by geography or profession) that employers can approach via a variety of methods, including sponsorships, content, and job postings.

Some sites provide additional functionality beyond the above list, such as 'pay per call' pricing (employer can add immediate response phone number to the job ad), verified candidate shortlists, and legal verification services (such as the Office of Federal Contract Compliance Programs or 'OFCCP' in the US). It is also not unusual to see applicant tracking systems (ATS), job scraping, and other SaaS HR tech provided under the umbrella of the Job Board's overall services. Typically these are added to provide the employer with a 'one-stop-shop' for their recruiting needs.

Several Job Boards also participate in The Network (www.the-network.com), a global association of Job Boards active in 130 countries that allows employers to purchase from a local representative, even if they are advertising out of country. For global organizations, The Network offers an alternative way to purchase and manage their recruitment advertising by tapping into strong local providers without necessarily having to limit their procurement initiatives to the few Job Boards that have international networks.

Services provided

A number of Job Boards that responded to our survey have provided details of their services.

It is evident that the larger Job Boards do have quite complex service portfolios with many similar, though by no means identical features.

The most common features among our survey respondents are having a mobile enabled website and a presence on Twitter.

Two features were not offered by any of these companies (referral mechanisms and recruiter and/or employer directory) though we believe these features are offered by many smaller niche boards. It may simply be that these listings become unwieldy when sites exceed a certain size.

Three of the sites said they offered predictive analytics – the ability to help employers identify where to find specific types of candidates – and we anticipate that this ‘big data’ product is just the first of many to come as Job Boards begin to leverage the vast amount of job and candidate data at their disposal.

	Jobindex A/S	InfoJobs	Jobs2Careers	SEEK	Workopolis	Beyond	Stepstone
Job alerts (email)	X	X	X	X	X	X	X
Job alerts (text message)	X	X		X		X	X
Mobile-enabled site	X	X	X	X	X	X	X
Android application	X	X		X		X	X
iPhone application	X	X		X		X	X
Referral mechanism							
Presence on Google+	X		X	X	X		X
Presence on Facebook	X		X	X	X		X
Presence on Twitter	X	X	X	X	X	X	X
Group on LinkedIn	X		X				X
Recruiter and/or employer directory							
Job posting distribution			X	X	X		X
Featured Advertiser/Company option	X	X	X	X	X		X
Job search advice	X		X	X	X	X	X
Career counseling/advice	X		X	X	X		X
Featured Job option for advertisers			X	X	X	X	X
Enhanced reporting to clients showing total apps/posting	X		X		X	X	X
Enhanced reporting to clients showing job distribution data	X						X
Full ecommerce for self-service sign-up and payment		X	X		X	X	X
‘Pay-per-application’ pricing model			X		X	X	
Candidate assessment	X			X	X		X
Reference/background checks				X			
Predictive analytics			X	X	X		
"Online community"						X	
Writing of job ads	X						
Employer brand analysis	X						
Candidate administration	X						
Pay-per-call			X				

Analysis by type

Job Boards can be split into five main categories depending on the primary methods they use to attract jobseekers and/or job advertisers.

Standard Job Board

The most common way in which Job Boards attract jobseekers is to have a large number of paid-for job advertisements. We have defined this as the ‘Standard Job Board’ model. The benefit of this model is that the Job Board has a direct commercial relationship with the organization advertising the job and, therefore, jobseekers can be reassured that the jobs on the site are real and active. This standard model comes in three flavors depending on the Job Board’s geographic or sector focus:

- Global
- Country-specific
- Niche

Job aggregator

Another method is to aggregate jobs from multiple sites in order to achieve scale – the rationale being that a larger number of jobs will attract a larger number of jobseekers. From a jobseeker perspective, aggregators promise the ability to be a ‘one-stop-shop’ for all jobs though, as not all jobs are published online, this perception is not always accurate. From an employer perspective, aggregators promise a wide distribution for their job postings, however, given the volume of postings, they may find that it is more difficult to maintain visibility for their offerings.

Job distributor

Job distributors act as intermediaries between organizations advertising jobs and multiple job Boards given that many organizations will want to post their jobs on multiple Job Boards in order to increase their chances of success. While it is an intermediary, we have decided to categorize this business model as a Job Board given it supplants the relationship of the Standard Job Board and the job advertiser. Some of these Job distributors are significant brands in their own right and some are owned by Standard Job Boards (e.g. Broadbean is owned by TEGNA Inc., the same company that owns CareerBuilder).

Career community

Some business models have been developed that provide other types of useful career services where job listings are an adjunct of the primary focus. A good example of this type of Job Board is Glassdoor whose primary purpose is to allow employees to provide opinions and rankings of their employer. Such rankings are clearly a very useful feature for prospective employees so it is not surprising that Glassdoor is able to leverage this primary feature to attract job advertisers.

Analysis by type (continued)

Social media job site

A number of social media sites have taken advantage of the huge traffic and visibility they have in order to offer job advertisements. The best known example of this is LinkedIn whose primary purpose is to allow users (workers and employers) to create profiles and "connections" to each other in an online social network. LinkedIn started to offer job advertisements two years after its launch. Currently, much of their revenue comes from allowing recruiters, head hunters, and HR personnel to source potential candidates by using advanced search tools.

Online classifieds site

Although online classifieds sites such as Craigslist offer listings for everything from home services to garage sales, a significant amount of their revenue is derived from job postings. Most offer an employer the ability to pick a geographic location, such as a city or state, and a job category, such as sales, to determine where their job postings appear. Online classified sites usually lack any of the more sophisticated, additional features found on traditional Job Boards, such as employer reporting, career information, and 'Apply' buttons.

Analysis by type (continued)

As well as the type of Job Board, it is also useful for prospective Job Board advertisers to look at each company with regard to its HQ location and type of ownership (public, or private).

The table to the right shows the worlds' largest Job Boards by category. For our ranking of these firms by revenue see our report:

<http://www2.staffingindustry.com/Research/Research-Topics-Reports/North-America/Largest-Job-Boards-Globally-2016>

Clearly, Job advertisers have a wide variety of choice in the type of Job Board they may wish to use and should pay attention to this when deciding on their preferred platform to advertise their jobs.

Parent Company	Primary Job Board Brand	Type of Board	Country	Type of Ownership
104 Corp.		Standard Job Board (country-specific)	Taiwan	Private
51Job		Standard Job Board (country-specific)	China	Public
Aspire Media Group	Jobserve	Standard Job Board (country-specific)	UK	Private
Axel Springer	Stepstone	Standard Job Board (country-specific)	Germany	Public; subsidiary
Beyond		Standard Job Board (niche)	US	Private
CareerNet Corp.		Standard Job Board (country-specific)	Korea	Private
Craigslist		Online classifieds site (global)	US	Private
DHI Group	Dice	Standard Job Board (niche)	US	Public
Dip Corp.	Baitoru	Standard Job Board (niche)	Japan	Public
eQuest		Job distributor	US	Private
Glassdoor		Career community	US	Private
Groupe Dassault (Le Figaro Group)	Keljob	Standard Job Board (country-specific)	France	Public; subsidiary
Info Edge	Naukri	Standard Job Board (country-specific)	India	Public
Jobindex		Standard Job Board (country-specific)	Denmark	Public
Jobs2Careers		Job aggregator	US	Private
LinkedIn		Social media job site	US	Public
Mail.ru	Headhunter	Standard Job Board (country-specific)	Russia	Private
Monster		Standard Job Board (global)	US	Public
Navent	Bumeran	Standard Job Board (country-specific)	Brazil	Private
Recruit	Indeed	Job aggregator	Japan	Public; subsidiary
RegionsJob		Standard Job Board (niche)	France	Private
Schibsted Media Group	Infojobs	Standard Job Board (country-specific)	Norway	Public; subsidiary
SEEK		Standard Job Board (country-specific)	Australia	Public
SimplyHired		Job aggregator	US	Private
Symphony Technology Group	Joprapido	Job aggregator	US	Private; holding company
TEGNA Inc.	CareerBuilder	Standard Job Board (global)	US	Public
TheLadders		Standard Job Board (country-specific)	US	Private
Torstar & Power Corp. of Canada	Workopolis	Standard Job Board (country-specific)	Canada	Public; joint venture
Xing		Social media job site	Germany	Private
ZipRecruiter		Job distributor	US	Private

Listed Job Boards by market capitalization

Thirteen of the world's largest Job Boards are publicly listed – either directly or as part of a larger holding company so we are able to rank them according to their market capitalization.

Market capitalization is the market value of a company's outstanding shares calculated by taking the stock price and multiplying it by the total number of shares outstanding. As such, it defines the company's 'true value' based on investor perceptions of growth potential and risk. Please bear in mind that not all of these rankings should be considered like-for-like comparisons as, when a Job Board is part of a larger conglomerate, the value of the business will include other unrelated services. Even so, it does provide you with some insight into the financial viability of your potential supplier(s) and there are some interesting disparities when like-for-like comparisons can be made.

Parent Company	Primary Job Board Brand	Market Cap (USD)*
Recruit	Indeed	17,602,651,811
LinkedIn		15,010,687,800
Schibsted Media Group	Infojobs	6,381,884,248
Axel Springer	Stepstone	6,064,179,345
TEGNA, Inc	CareerBuilder	5,072,022,900
SEEK		4,318,360,596
51Job Inc.		1,799,504,700
Dip Co	Baitoru	1,515,862,800
Info Edge	Nakuri	1,355,946,353
DHI Group	Dice	366,838,750
Monster		287,776,800
Jobindex		273,573,900
Mail.ru	Headhunter	68,719,531

The company with the largest market capitalization is Recruit (USD 17.6 billion) by virtue of the fact that it owns a number of staffing businesses and other commercial operations aside from Job Boards.

LinkedIn is ranked second with a market capitalization of USD 15.0 billion.

The remainder of the top five in our ranking are media conglomerates who also derive revenue from broader services than just Job Boards.

The company with the largest market capitalization that we would categorize as a 'pure' Job Board is Australian-headquartered SEEK.

**Market cap data was calculated by multiplying a firm's outstanding shares by the mid-point of its stock price on May 2, 2016. For stocks denominated in non-US currency, the price was adjusted to USD using the mid-point of the exchange rates on May 2, 2016 as published on Oanda.com.*

N.B. Workopolis is a 50/50 joint venture between two publicly-listed firms; Torstar Corporation & Power Corporation of Canada and is, therefore, omitted from this ranking.

Job Board segmentation

Aside from geography, Job Boards address the employment market via a variety of segmentation: by occupational sector, industry, and employer type. By understanding how a given Job Board focuses its efforts in reaching candidates in a particular segment, employers can make a more efficient and effective buying decision. In short, it is best to match a Job Board to the types of candidates that an employer is targeting.

Occupational segments

Candidate focus can be determined by occupation. For example, Dice focuses on candidates that work in IT roles, whereas MiracleWorkers focuses on healthcare professionals.

Industry

Job Boards may also focus on specific industries – for example, Rigzone targets the energy industry, and WorkInRetail targets retail. Although the number of candidates reached via such sites may be lower than on general sites, the audience is specific to the industry – thus potentially increasing response rates, improving the chance of identifying the right candidate and lowering the cost per hire.

Employer type

Some Job Boards focus exclusively on particular types of employers – for instance, a specific company size, such as enterprise employers or small businesses. For example, ZipRecruiter is explicitly targeted at small-to-medium sized businesses, which it does by combining multiple functions (job posting, job distribution, analytics) into a single lightweight cloud-based platform.

Job Board metrics

In determining which Job Board (or group of boards) is the best fit for a given recruiting requirement, it is useful to look beyond the features mentioned previously, and delve into specific performance metrics. In general, Job Boards act as **recruitment marketing vehicles** – they connect specific groups of candidates with an employer’s job opportunities. So metrics that measure the likelihood that an employer will achieve their hiring objective are most useful, if sometimes hard to come by.

Job Board metrics fall into two general categories: size and volume, and candidate engagement and activity. For each category, we would recommend the following as the most useful:

Size and volume:

- Number of **resumes** available for search and review
- Number of **unique visitors** per month
- Number of **jobs posted per month**. This is particularly useful in gauging how visible – or not – an employer’s job may be, as well as how active the site is, however, you should also consider how visible your specific job vacancy will be on a website with a huge amount of jobs. This metric should be considered alongside others such as unique visitors as well as the quality of the Job Board’s search functionality which is essential in enabling the right candidate to find your job advertisement.

Candidate engagement and activity:

- Number of **jobs viewed** per candidate visit
- Amount of **time spent** per candidate visit
- **Applications** per job posting

By using data from both categories, employers can make more targeted purchases of Job Board services, particularly with regard to job postings.

On the following page, we have looked at some publicly available metrics to compare Job Boards. For those organizations managing more than one Job Board, we have focused on what we believe to be their most prominent Job Board.

Job Board metrics (continued)

Parent Company	Site analyzed	Alexa rank (global)*	Average monthly job listings**	Number of monthly visits**	Ratio visits/job listings***
104 Corp	www.104corp.com	19,794,919	251,655	9,455,117	38:1
51Job	www.51job.com	4,561,757	3,200,000	12,256,909	4:1
Aspire Media Group	www.jobserve.co.uk	29,795	160,482	1,094,341	7:1
Axel Springer	www.stepstone.de	4,659	52,300	5,269,165	101:1
Beyond	www.beyond.com	6,737	16,800	3,808,281	227:1
CareerNet Corp.	www.careernet.co.kr	1,351,807	n/a	1,500,000	n/a
Craigslist	www.craigslist.org	71	1,000,000	334,500,000	335:1
DHI Group	www.dice.com	4,393	86,991	4,951,785	57:1
Dip Corp.	www.baitoru.com	11,166	n/a	7,100,000	n/a
eQuest	www.equest.com	603,667	n/a	181,000	n/a
Glassdoor	www.glassdoor.com	700	492,893	27,811,464	56:1
Groupe Dassault (Le Figaro Group)	www.leljobs.com	33,699	9,500	2,204,765	232:1
Info Edge	www.naukri.com	409	75,000	26,866,836	358:1
Jobindex	www.jobindex.dk	19,938	18,700	1,012,077	54:1
Jobs2Careers	www.jobs2careers.com	14,772	41,300	1,394,914	34:1
LinkedIn	www.linkedin.com	18	n/a	106,000,000	n/a
Mail.ru	www.hh.ru	906	288,659	33,525,758	116:1
Monster	www.monster.com	1,012	200,000	17,244,016	86:1
Navent	www.bumeran.com	15,382	12,386	2,687,696	217:1
Recruit	www.indeed.com	150	2,918,300	118,032,116	40:1
RegionsJob	www.regionsjobs.com	76,954	32,144	2,745,222	85:1
Schibsted Media Group	www.infojobs.net	2,477	39,476	7,966,423	202:1
SEEK	www.seek.com.au	13,369,801	141,101	8,814,784	62:1
SimplyHired	www.simplyired.com	3,612	6,105,000	4,557,254	1:1
Symphony Technology Group	www.jobrapido.com	1,396	n/a	31,500,000	n/a
TEGNA Inc.	www.careerbuilder.com	1,695	100,000	14,700,000	147:1
The Ladders	www.theladders.com	10,240	n/a	2,900,000	n/a
Torstar & Power Corp. of Canada	www.workopolis.com	13,508	230,000	2,083,750	9:1
Xing	www.xing.de	1,150	n/a	26,300,000	n/a
ZipRecruiter	www.ziprecruiter.com	4,272	n/a	15,600,000	n/a

*Alexa's Traffic Ranks are based on the traffic data provided by users in Alexa's global data panel over a rolling three-month period. Traffic Ranks are updated daily. A site's ranking is based on a combined measure of Unique Visitors and Pageviews. Unique Visitors are determined by the number of unique Alexa users who visit a site on a given day. Pageviews are the total number of Alexa user URL requests for a site. We have found that Alexa data is more accurate for North American and European sites but less reliable for other regions. For further information, see <https://support.alexa.com/hc/en-us/articles/200449744-How-are-Alexa-s-traffic-rankings-determined->

** Measured by Similar Web as per May 6, 2016.

***The ratio of candidate visits to job listings can be a useful measure of how likely an employer's job posting will be viewed on a Job Board. A higher ratio may indicate higher viewership – i.e., more candidates to view each job – whereas a lower ratio may indicate lower viewership – i.e., fewer candidates to view each job.

Job Board company profiles (30 largest Job Boards by revenue in alphabetical order)

104 Corp.: 104 Corporation provides online recruitment services for hiring companies and job applicants. The company, which was founded in 1996, also offers professional services for career planning. The company also assists clients in acquiring suitable candidates for their temporary staffing, permanent placement, and outsourced staffing requirements; and proposes executive candidates for clients' interview and selection according to their business strategies and needs. 104 Corporation is headquartered in New Taipei, Taiwan.

51Job: 51job, Inc., incorporated in March 2000 and is a provider of integrated human resource services in China. With a focus on recruitment advertising, the Company operates www.51job.com which is utilized by a base of corporate employers, reaches an audience of job seekers and aggregates job information from over 100 cities across China. It also operates a print publication in the city of Xian. The Company provides other human resource related services, consisting primarily of business process outsourcing, training, campus recruitment and executive search services. In addition, the Company offers marketing tools, such as priority placement of their job postings in keyword search results and direct email marketing campaigns to a targeted group of job seekers, to employers for a fee.

AspireMediaGroup: Aspire Media Group Limited is engaged in the fields of online media and content in the United Kingdom. It offers Job Board solutions, online recruiting tools, media solutions, and consultancy services for online recruitment; and Jobg8, an online marketplace for buying and selling job applications. The company also organizes business-to-business shows and exhibitions. Major Job Boards include Jobserve, Computerwork, Jobnet.com.au, Jobshark, CareerBoard, and Careers4Graduates. Aspire Media Group Limited was formerly known as Jobserve Holdings Limited and changed its name to Aspire Media Group Limited in December 2008. The company was incorporated in 2000 and is based in Colchester, United Kingdom. It has locations/offices in Essex, United Kingdom; Cleveland and Atlanta; Sydney, Australia; Ottawa, Canada; and Bangkok, Thailand.

Axel Springer: Axel Springer founded his publishing house in Hamburg in 1946. Axel Springer SE today is the market leader in the German print business, and also active in more than 40 countries through subsidiaries, joint ventures and licenses. Major Job Board brands include Stepstone, TotalJobs, Jobsite, IrishJobs, CareerJunction, and YourCareer Group. The German-based company employs over 15,000 people throughout the world. Axel Springer secured itself a majority of StepStone ASA as early as September 2009, and now holds 100% of the shares. The site currently generates over 800,000 unique visitors per month and has over 300,000 resumes.

Beyond: Beyond.com, Inc. operates an online career network to connect job seekers and employers through career channels, and industry and regional communities. It offers featured resume listing, resume distribution and writing, career consultation, continuing education, personality assessment, background check, salary calculation, franchising, reputation defender, job search and interviewing, resume and portfolio, and recruitment blog resources. The company has a network of more than 15,000 niche job sites. Beyond's network of 500+ talent communities use integrated social features to help members discover relevant career news, advice and resources.

Job Board company profiles (continued)

CareerNet Corp.: CareerNet is a Korean company that provides several recruitment services, including a Job Board, career fairs, and candidate training. CareerNet typically lists an average of 13 million jobs. It also runs Albaro, which focuses on part-time jobs. The company also provides additional distribution of recruitment content via a network of both online and offline business affiliates.

Craigslist: Craig Newmark began Craigslist in 1995 as an email distribution list to friends, featuring local events in the San Francisco Bay Area. It became a web-based service in 1996 and expanded into other classified categories. It started expanding to other US cities in 2000, and now covers 70 countries. On August 1, 2004, Craigslist began charging \$25 to post job openings on the New York and Los Angeles pages. On the same day, a new section called "Gigs" was added, where low-cost and unpaid jobs and internships can be posted for free. The site serves more than 20 billion page views per month, with more than 49.4 million unique monthly visitors in the United States alone.

DHI Group: DHI Group, Inc., formerly Dice Holdings, Inc., incorporated on June 28, 2005, is a provider of specialized Websites focused on select professional communities. The Company's Tech & Clearance segment consists of the Dice, ClearanceJobs and Dice Europe services, as well as career fairs. The Finance segment includes the eFinancialCareers service around the world. The Energy segment includes the Rigzone service, OilCareers service and career fairs. The Healthcare segment includes Health eCareers and BioSpace services. The Hospitality segment includes Hcareers. BrightMatter focuses on recruitment products and services that are applicable across the Company's brands.

Dip Corp.: DIP Corporation is a Japan-based company primarily involved in the provision of job information and employment agency business through the Internet. It has five business segments. The Baitoru Com segment provides job information to contractors and recruiting companies through part-time job information site Baitoru Com. The Hatarako Net segment offers staff service job information to staffing companies through manpower 'dispatching' the information site Hatarako Net. The Job Engine segment is engaged in the provision of job offerings and career change information to recruiting companies through the site Job Engine. The 'Others' segment offers services to restaurant customers through Baitoru Com. The Agent segment is engaged in employment agency business between nurses and healthcare facilities.

eQuest: eQuest provides domestic and international job posting delivery, Job Board management and Job Board performance analytic consulting. Its primary customer base is Global Fortune 500 companies and its secondary customer base exceeds 20,000 companies. The US-based company posts jobs to any posting destination in the world, reaching over 180 countries and territories and thousands of job posting destinations worldwide. Big Data Division provides comprehensive candidate source tracking analysis for evaluating Job Board performance. Other services include Job Board negotiation, billing aggregation, on-demand analytic tools, and OFCCP (Office of Federal Contract Compliance Programs) services. eQuest has built a global network serving more than 190 countries and territories and moving over 250 million job postings each year.

Glassdoor: Glassdoor.com features profiles of companies and allows users to rate and review their employers and top managers and provide information on interviews and salaries. The website has user-generated reviews of more than 340,000 companies in over 190 countries. Glassdoor claims more than 27 million registered members worldwide. Glassdoor has raised about \$160 million in investment funding thus far, and has a valuation of close to \$1 billion. The company is planning for an initial public offering.

Job Board company profiles (continued)

Groupe Dassault (Le Figaro Group): Dassault Group; GIMD, Groupe Dassault, or the Groupe Industriel Marcel Dassault S.A.) is a France-based group of companies established in 1929 with the creation of Dassault Aviation. It includes the Figaro Group, which operates Keljob and Cadremploi, two leading French Job Boards.

Info Edge: Info Edge India Limited is an India-based online classifieds company. The Company is engaged in the business of Internet-based service delivery operating in four service verticals through Web portals. Its service verticals include Naukri.com for recruitment-related services, Jeevansathi.com for matrimony-related services, 99acres.com for real estate-related services and Shiksha.com for education-related services. It also offers placement search services, resume sales services and real estate broking services. Its recruitment portfolio is supported by the offline executive search business, Quadrangle, and its associated portal, www.quadranglesearch.com. Its Web portal, www.naukrigulf.com caters to the Middle East job markets. It also offers a fresher hiring site, www.firstnaukri.com. The Company also operates in Dubai, Bahrain, Riyadh and Abu Dhabi. Its subsidiaries include Zomato Media Pvt Ltd. and Applect Learning Systems Pvt Ltd.

Jobindex: Jobindex A/S is a Denmark-based company that operates an Internet job database. It provides a search engine, jobindex.dk that searches for job advertisements in over 500 job fairs, employment centers, websites of private companies in Denmark and other advertisement databases. The Company provides links to approximately 10,000 job advertisements and it offers an overview of approximately 90% of all the Danish job advertisements on Internet. The Company operates a Jobsafari job database in 10 European countries and has sales and marketing activities in Sweden and Norway. As of December 31, 2011, the Company was 92.3%-owned by Danielsen.com ApS. In March 2014, it acquired StepStone A/S, a Danish arm of the European StepStone job-portal, and announced establishment of a subsidiary, it-jobbank a/s.

Jobs2Careers: Jobs2Careers is a US-based job search aggregator with more than 20 million registered users and over 800 million monthly searches. The site offers not just professional jobs, but also part-time work and gigs to jobseekers. The company also offers pay-for-performance solutions for employers to locate candidates. Jobs2Careers was founded in 2010 by CEO Bruce Ge and is headquartered in Austin, Texas

LinkedIn: California-based LinkedIn started out in the living room of co-founder Reid Hoffman in 2002, and it officially launched on May 5, 2003. It is now the world's largest professional network with more than 400 million members in 200 countries and territories around the globe. The company has a diversified business model with revenue coming from Talent Solutions, Marketing Solutions and Premium Subscriptions products. Headquartered in Silicon Valley, LinkedIn has offices across the globe. Recent acquisitions targeting its recruiting capabilities include Bright, Rapportive, Careerify, and Connectifier.

Mail.ru: Mail.ru Group Limited is an Internet company which offers a range of online communication products and entertainment services. Major Job Board brands include Headhunter and Rabota.Mail.Ru. The Company's segments include Email, Portal and IM; VKontakte (VK); Social Networks (ex VK); Online Games, and Search, E-Commerce and Other Services. It participates in businesses that operate in the Internet segment, including portals, social

Job Board company profiles (continued)

networking and communications, online marketplaces, 'massively multiplayer online' games (MMO games), social and mobile games. The Email, Portal and IM segment includes e-mail, instant messaging services and the mail.ru portal together with media projects. The Social Networks (ex VK) segment includes Odnoklassniki (OK) and My World social networks. The Online Games segment comprises its browser-based, client-based, mobile and social games. The VK segment includes the VK.com social network. The Search, E-Commerce and Other Services segment includes search services, e-commerce and certain other projects.

Monster: Monster pioneered the business of digital recruiting in 1994, first appearing as the Monster Board. Monster Worldwide, Inc., incorporated on August 30, 1996, is engaged in connecting people to jobs. The Company offers services in over 40 countries, providing job seeking, career management, recruitment and talent management capabilities. Major Job Board brands include Monster, CareerOne, Jobpilot, jobs.cz, profesia, and Workania. The Company's segments include Careers-North America and Careers-International. In addition to their broad portfolio of global websites, Monster offers advertising space on such category properties such as Military.com and FastWeb.com. In 2014, Monster also added job aggregation to its offerings. Over 6.5 million job searches are performed each day, and 5.1 million jobs are viewed. Monster acquired TalentBin, a people aggregator, in 2014.

Navent: Navent Group was established to provide jobs and real estate online listings to people living in Latin America. The company was founded in 2010, and owns five job classifieds websites: Bumeran, Konzerta, Multitrabajos, UniversoBit, and Curriculum, the most popular of which is Bumeran.com. Bumeran has over 5 million individual users per month and lists over 50,000 job postings. As of January 2013, Navent has received \$70 million in venture capital. In November 2012, the company received \$30 million in incremental funding from Riverwood Capital and Tiger Global Management. It is using the funding from Riverwood Capital and Tiger Global Management to develop and expand its geographic presence and strengthen its operations in the region.

Recruit: Recruit Group was founded in 1960 in Japan, and currently employs over 31,000 people in Asia, Europe, North America, and Oceania. The company operates three major segments: Marketing Media, Staffing, and HR Media (which includes Recruit's Job board brands). Major Job Board brands include Indeed, Rikunabi, Town Work, Hatalike, Travaille, and From A Navi whose collective revenues make Recruit the world's largest provider of Job Board services. In addition to its own Job Boards, Recruit partners with 51Jobs in China. The company's staffing brands makes it the world's sixth largest staffing firm.

Regionsjob: Regionsjob was founded in 2000 in France. The Company's line of business includes providing employment and recruitment services. The company runs a network of eight regional sites (EstJob, nordjob, OuestJob, SudOuestJob, RhônealpesJob, CentreJob, PacaJob and Parisjob).

Schibsted Media Group: Schibsted ASA is a Norwegian company primarily engaged in the media sector. The Company has a presence in printed newspapers, online newspapers, classifieds, directories and live pictures. Its major Job Board brand is InfoJobs which caters to the Spanish employment

Job Board company profiles (continued)

market. The Company's operations are structured into two segments: Media Houses and Online Classifieds. The Company's Schibsted Classified Media is an online classifieds business in Europe. In addition, the Company also has Investment in the international online classified business. The Company has operations in several markets in Western Europe and in growing markets in Asia, Eastern Europe and Latin America.

SEEK: SEEK is a group of companies encompassing employment, education and volunteer businesses which span across Australia, New Zealand, China, India, Brazil, Mexico, Indonesia, Nigeria, Bangladesh, Philippines, Vietnam, Thailand, South Africa, Kenya, Malaysia, Hong Kong and Singapore. Major Job Board brands include Seek, Zaopin, JobsDB, JobStreet, OCC, and Brasil Online. SEEK's employment marketplaces receive over 375 million visits each month and have over 3 million job opportunities and over 100 million jobseeker profiles. SEEK Learning offers advice in relation to career related education and Online Education Services (OES) offers online education for working Australian adults.

SimplyHired: Simply Hired, a technology company based in Sunnyvale, California, operates job search engines in 24 countries and 12 languages. With more than 30 million unique visitors per month, the company provides jobseekers access to millions of job openings across all job categories and industries, reaching job seekers on the web, mobile devices, email, and via thousands of partner sites including The Washington Post, Fox Business, Bloomberg Businessweek, Computerworld, International Nurses Association, and Hero2Hired. Simply Hired provides employers with full-service pay-per-click (PPC) and self-service pay-per-post job advertising solutions. Simply Hired was founded in 2005 and is privately held with funding from Foundation Capital and IDG Ventures.

TEGNA, Inc.: TEGNA, a spin-off of Gannett Media's digital media businesses, operates Job boards in 24 countries, including Germany, the US, UK and Singapore. Major job board brands include CareerBuilder, JobsCentral, Broadbean, JobScout24, Sologi, Headhunter, CareerRookie, MiracleWorkers, WorkInRetail, and JobsInMotion. CareerBuilder's acquisition of EMSI resulted in a number of predictive data recruiting services. TEGNA also includes 46 television stations (including those serviced by TEGNA) and is the largest independent station group of major network affiliates in the top 25 markets. TEGNA reaches more than 90 million US adults across broadcast and digital media.

Symphony Technology Group: Symphony Technology Group is a private equity firm based in Palo Alto, California, USA. Its managing partner is Romesh Wadhvani, who founded the firm in 2002. The company's primary Job Board brand is Jobrapido, a job aggregator. Jobrapido lists over 20 million jobs every month, record 35 million monthly unique users, and has more than 60 million registered users. The site conducts business in 58 countries.

The Ladders: Targeting high-level executive positions, TheLadders lists job postings on its website (more than 50,000 jobs are typically featured). The site lists jobs that come with salaries of at least \$100,000; industries covered include sales and marketing, human resources, finance, information technology, and law. It charges companies to post available positions, and job hunters must buy a subscription to receive full access to the postings. TheLadders.com was founded in 2003 by former executives from HotJobs. TheLadders is now used by more than 8 million professionals and 100,000 employers nationwide. Unlike other employment sites that charge companies to post entries, TheLadders charges both job seekers and employers for their listings, and states that they confirm the authenticity and quality of each listing on the site.

Job Board company profiles (continued)

Torstar Corp. & Power Corp. of Canada: Power Corporation of Canada is a diversified management and holding company. The Company has interest in the financial services, communications and other business sectors. Torstar Corporation is a Canadian media and publishing company. The company is primarily a publisher of daily and community papers, including its flagship and namesake, the Toronto Star. These two companies own Workopolis, Canada's largest Job Board.

Xing: The social network for professional contacts in Germany, Austria and Switzerland, with nearly 9 million members, Xing claims to be a clear market leader. The company was founded in 2003 in Hamburg, Germany, is a public company and listed since September 2011. In December 2010, XING took over the Munich-based amando AG, Europe's leading provider of online event management and ticketing. With the purchase of kununu, the market-leading platform for employer reviews in the German-speaking world, XING has further strengthened its position as the market leader in the area of social recruiting. Early in 2015, XING took over the intelligence competence center AG. This makes the Web page Jobbörse.com, one with over 2.5 million jobs and the largest Job Search Machine in German-speaking countries.

Zip Recruiter: US-based ZipRecruiter was founded in 2010. ZipRecruiter's services allow businesses to post vacancies on 50 Job Boards, review applicants in a single list and search for resumes. Jobseekers use its services to get relevant openings through emails and alerts. The company raised \$63 million in 2014 from a group of venture capital firms, led by Institutional Venture Partners.

Conclusion

Job Boards continue to prove a useful source for attracting job candidates. Many Job Boards have expanded their traditional role into new areas, such as contingent recruitment, staffing, candidate screening, and predictive recruiting analytics. By selecting sites on the basis of their geographic and industry focus, employers can increase the effectiveness of their recruiting investments by reaching the specific types of candidates they require, while simultaneously limiting hiring expenses on non-target audiences.

There is huge diversity in the business models and service offerings of Job Boards and it is worth paying attention to this before selecting the appropriate Job Board(s) for your vacancy.

A common thread among the 30 largest Job Boards (by revenue) is a strong mobile presence – which makes sense, given that as much as 70% of current candidate job searches originate on mobile devices (See 2016 Global Job Board Trends Survey, TAtech/JobBoardDoctor). All sites utilize responsive design to support mobile access, and a number of respondents also offer site-specific iPhone and Android apps.

Another common feature is the use of push technology to keep candidates engaged. Job alerts are the most common method for achieving this, but some Job Boards also offer text messages to keep candidates informed of specific job opportunities that fit their profile. As more candidates move to a ‘mobile first’ job search strategy, push technology can keep them engaged with employer opportunities even though they spend less time on a desktop computer.

The global nature of the 30 Job Boards profiled in this report mirrors the global nature of many employers’ recruitment needs. Working with Job Board partners that can reach into diverse geographic areas can be a real plus for global employers. At the same time, many of these same Job Boards provide niche solutions as well, allowing employers to focus exclusive on particular candidate populations. Even as Job Boards increase their reach, we also expect them to continue expanding their niche candidate solutions.

Finally, it is worth noting that Job Boards, while an important part of an employer’s recruitment program, are not the only solution (although some providers are doing their best to provide a single solution through expanded services). Direct sourcing through referrals continue to provide the majority of candidates for most employers while other intermediaries such as staffing agencies play an important role in the market. By coupling a comprehensive referral program with careful use of Job Board services and complemented with effective relationships with staffing firms, employers can ensure that they have the candidates they need, when they want them.

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About JobBoardDoctor LLC

This report was created in conjunction with JobBoardDoctor LLC, a consulting company specializing in job boards and online recruiting. The company is led by Jeff Dickey-Chasins, a veteran of the industry who guided the marketing and sales functions at Dice during its initial years. He has worked with hundreds of job board and recruiting companies around the world, ranging from multinational sites to venture-funded startups. The company provides strategic, technical, and branding guidance for sites in all areas of the online recruiting industry.

For more information: <http://www.jobboarddoctor.com>