



UK Online Recruitment Overview

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UK recruitment market



- More recruitment media in the UK than in any other European country
- Few print recruitment launches over last 20 years
- 700 job boards – generalist and niche
- UK online advertising (IAB 2005) - £1.4bn (up 65% on 2004)
- Online recruitment advertising = 22% (in 2005)
- Fastest growing advertising medium in the UK

UK jobseekers



- 41% - UK online population have used the Internet to look for a job *
- 34% - UK working population have used the Internet to look for a job *
- Browsing for jobs is the fastest growing activity on the Internet and the 5th most popular activity overall
- In March 2006 - 3m job seekers visited Totaljobs Group job boards 5.5m times generating 1.4m applications

* BMRB Apr 04-Mar 05

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www.caterer.com - www.salestarget.co.uk - www.catererglobal.com - www.cwjobs.co.uk - www.retailchoice.com - www.totaljobs.com - www.hotelscareers.com

Internet usage is changing



- 65% of adults use the Internet (TGi.Net)
- 64% UK households have broadband access (ONS Feb 2006)
- Broadband uptake is growing at 100% a year
- Job seekers want the right jobs, right now

Trends brought about by E-Recruitment



- Jobseekers are in demand, in control and online
- Organisations need to work harder for applications
- E-recruitment becoming a specialism
- Online means ROI measurement easier – total transparency
- Technology is a given
- Growing awareness of employer branding
- Developing talent pools
- Locally and nationally – online delivers
- Online appeals to diverse range of job seekers (> national averages)

Employers and job boards



- More and more employers are migrating online
- Many myths to overcome – education/proof
- Not all employers measure effectiveness of online (or print)
- Employers need to concentrate on managing applicants
- Job boards spend to deliver the audience
- Online provides a new, low cost, level playing field for employers

Predictions...



- In five years' time - £500m market
- Everyone will look for a job online
- All employers will choose online as part of their recruitment 'mix'
- Four dominant horizontal job boards
+ JobCentre Plus
- Candidate and job matching will be local