Новые тенденции в области онлайн рекрутмента в Мире

Директор
по электронной коммерции

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Июнь 2016

Темы доклада:

1. **Основные игроки рынка онлайн рекрутмента в Мире**

   1. **Indeed.com**
   2. **Linkedin.com**
   3. **Seek.com**
   4. **Stepstone.com**
   5. **Monster.com**
   6. **The Monster**

2. **Новые тенденции**

   3. **Оплата за отклик**

   4. **Обзоры компаний и рейтинг**

   5. **Big Data и Matching**

   6. **ATS и автоматизация**

   7. **Мобильный траффик и видео**

Предпосылки для роста подбора сотрудников за рубежом:

1. Заметное снижение количества трудоспособного населения в России

2. Глобализация экономики

Соотношение количества пенсионеров и трудоспособных граждан в разные годы в СССР и России

млн человек

- все население
- трудоспособное население
- пенсионеры

Прогноз численности трудоспособных граждан и пенсионеров на **2020** год

Год	все население	трудоспособное население	пенсионеры
1926	92,681	47,830	7,945
1959	117,534	68,609	13,827
1979	137,410	82,959	22,436
2009	141,904	89,266	30,97
2020		79	36

По данным Федеральной службы государственной статистики

Население трудоспособного возраста
по прогнозу Минтруда (млн человек)

2013г.	2015г.	2025г.
86,1 млн	84,2 млн	79,5 млн

Profile.ru

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HeadHunter

Важнейшие атрибуты и мотивы хорошей работы по странам

EXHIBIT 9 | Most Important Workplace Attributes, by Nationality of Respondents

	Americas							Asia-Pacific						Africa		Europe												Middle East/North Africa		
---	AR	BR	CA	CL	MX	US	VE	CN	IN	ID	MY	PH	TW	NG	ZA	AT	BE	DK	FR	DE	IT	ES	SE	CH	TR	RU	UA	UK	DZ	MA
1 Appreciation for your work	2	1	4	5		5	3		5	5	2		1		5	2	2	2	5	2	1	3	5	3	1	5	2	4	4	
2 Good relationships with colleagues		5	3										5	1		1	3	1	3	1	4	4	2	1	4			1	2	3
3 Good work-life balance	3	3	2	2	3	3	5	2	2	1	1	3	2		5	1					2	4	4	3			4	2	5	5
4 Good relationships with superiors		4	1			2					5	2		2	2	3	5	4	1	4	3		3	2				3	3	2
5 Company's financial stability			5	4	4	1	2	3		3	3	5			1											1	1			
6 Learning and career development	1	2		1	1		1	1	1		4		4	4	4					2	2	1			5	4	5		1	1
7 Job security	5							4		3		1		5	4							5			2				5	
8 Attractive fixed salary	4			3	2					2	4							4		3						2	3			
9 Interesting job content																4		3		5	5		1	5		3				
10 Company values							4		4				4	3	3	3														
Number of responses	7,075	11,282	3,595	1,792	14,758	12,050	3,675	3,618	4,947	4,610	4,127	2,587	1,687	2,433	2,047	2,105	1,282	1,658	3,214	16,220	5,546	5,293	3,474	4,414	8,627	5,085	3,641	6,363	2,505	1,886

Attribute's rank in importance: 1 2 3 4 5 Not in the top five

Ведущие игроки на рынке онлайн рекрутмента и их выручка

				По оценке
2,9 млрд. долл	Ок. 0,6 млрд. долл	0,666 млрд. долл	0,62 млрд. долл	0,3-0,5 млрд. долл.

Some facts about Indeed.com

Total Global Job Traffic
Source: comScore December 2014

indeed

Chart: Indeed, Monster, CareerBuilder, StepStone, Simply Hired, Seek
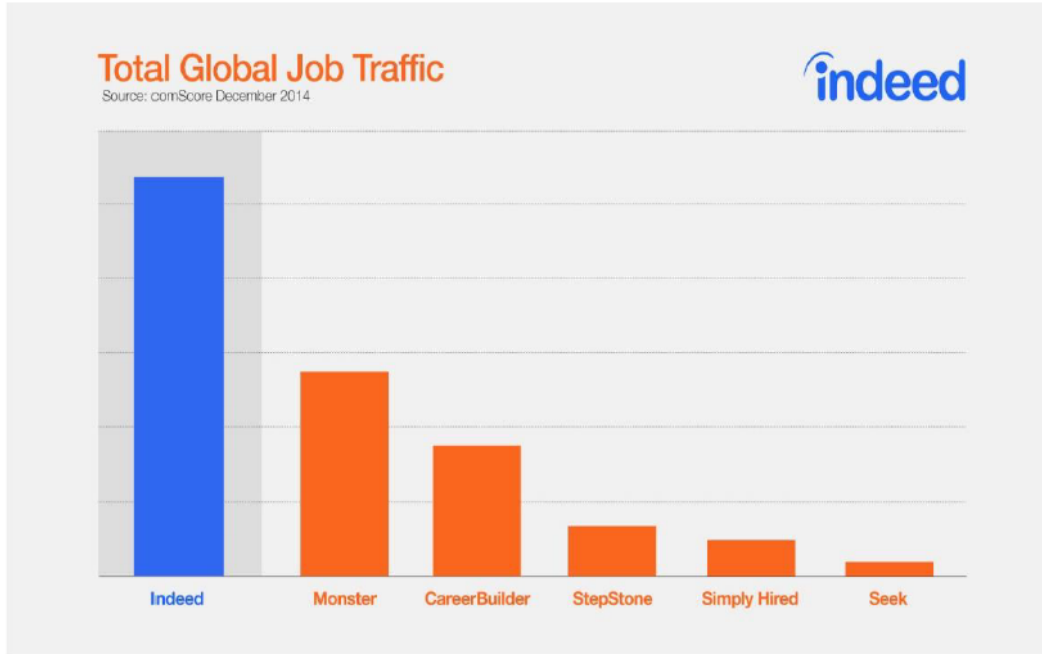
- 200 MIO Unique users in February 2016

- More than 60 countries

- Indeed Half Year 2015 Revenue: $300.3 Million, 57% Year-over-Year Increase

- #1 source of external hires for thousands of companies (sources: SilkRoad & iCIMS)

- Indeed enables to search jobs posted on 1,000's of websites. Employers also post jobs directly on Indeed.

hh.ru HeadHunter

LINKEDIN достиг критической массы

414 000 000

REGISTERED MEMBERS

10M+ CANADA

111M+ UNITED STATES OF AMERICA

7M+ MEXICO

20M+ BRAZIL

3M+ RUSSIA

8M+ CHINA

1M+ JAPAN

1M+ SAUDI ARABIA

28M+ INDIA

1M+ UNITED ARAB EMIRATES

3M+ SOUTH AFRICA

6M+ AUSTRALIA

1M+ NEW ZEALAND

3M+ INDONESIA

2M+ PHILIPPINES

1M+ MALAYSIA

1M+ SINGAPORE
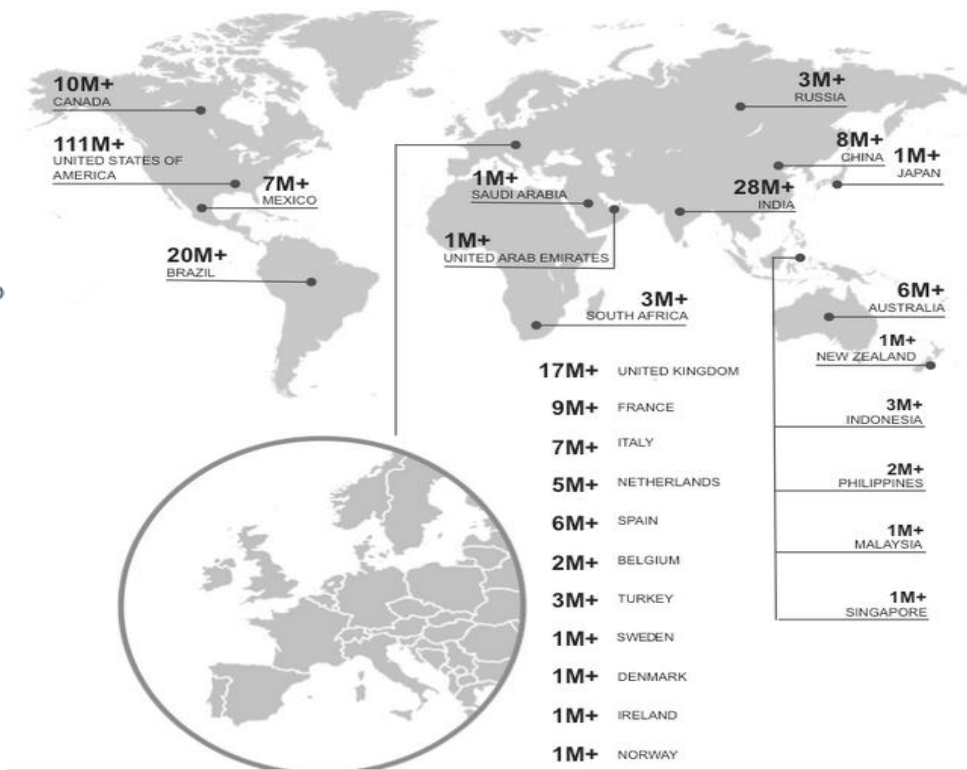
Regional membership

110M+ EMEA
84M+ Europe
64M+ Asia and the Pacific
12M+ Southeast Asia
6M+ DACH
14M+ MENA
48M+ LATAM

17M+ UNITED KINGDOM
9M+ FRANCE
7M+ ITALY
5M+ NETHERLANDS
6M+ SPAIN
2M+ BELGIUM
3M+ TURKEY
1M+ SWEDEN
1M+ DENMARK
1M+ IRELAND
1M+ NORWAY

The Network в мире

- **132 страны**
- **263,000,000 резюме**
- **189,000,000 уник. посет. в мес.**

Профессиональные социальные сети

В России

Профессионалы.ru ок. 6,5 млн. пользователей

Мой Круг ок. 4 млн. пользователей (8 июня перешла от Yandex к Habrhabr и будет узко специализироваться на IT)

LinkedIn 5,5 млн. пользователей

Headhunter – почти 21 млн резюме и более 17 млн. уникальных посетителей в месяц

В Мире

LinkedIn 414 млн. пользователей (более 200 стран)

Viadeo 40 млн. пользователей

Xing 10 млн. пользователей

Общий взгляд на рынок онлайн рекрутмента от Broadbean

6,000 clients

3.5m adverts per month

130,000 users

10m applications per month

3.7m searches per month

210 employees globally

Job volumes remain high and growing

Vacancy Volumes

2014 - 18.4%

2015 - 15.5%

Vacancies

broadbean
technology
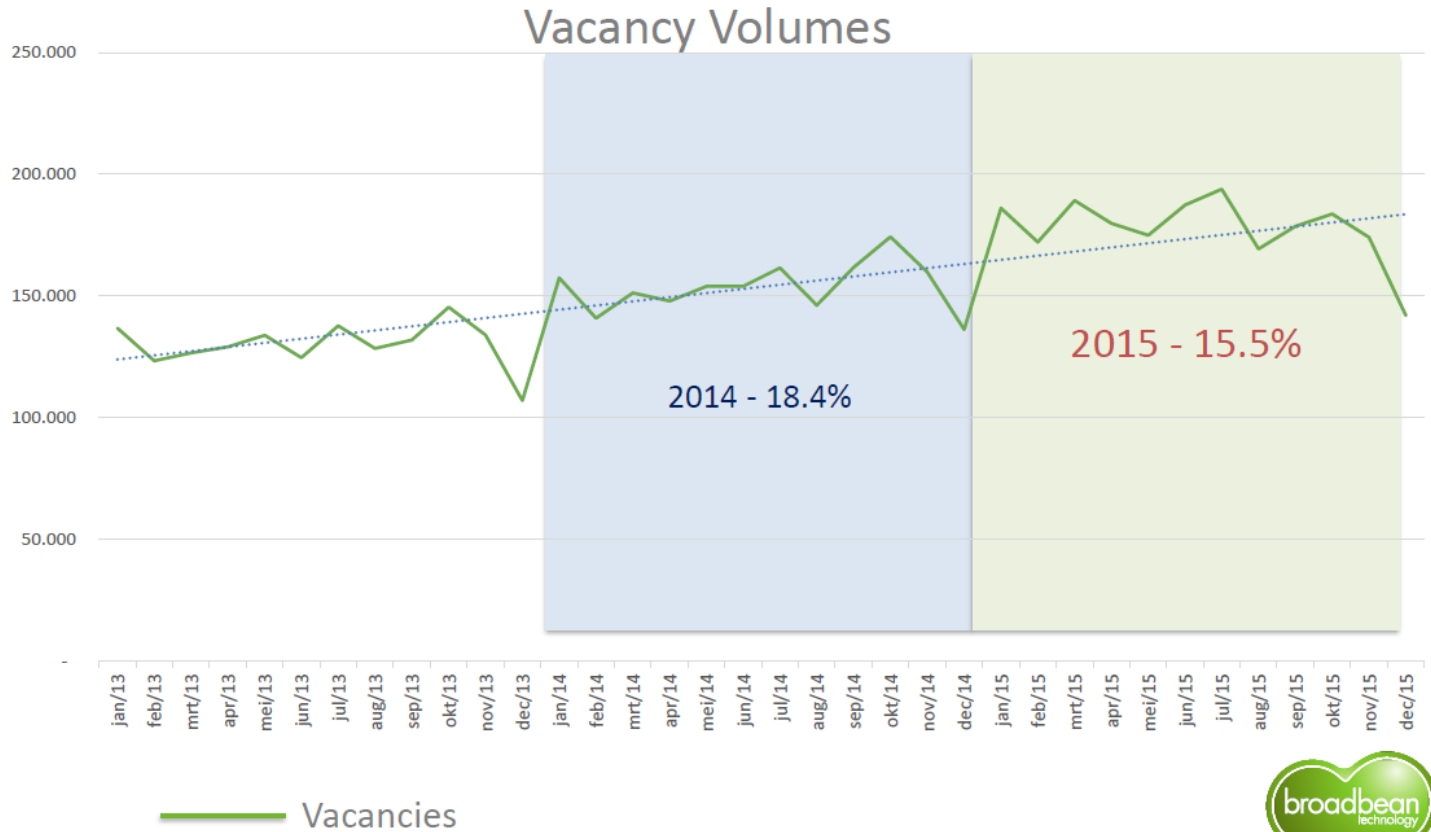
Unemployment Rate	2009	2012	2015
🇺🇸	10.1%	7.5%	5.0%
🇨🇦	8.3%	7.2%	7.1%
🇩🇪	7.3%	5.3%	4.3%
🇫🇷	9.5%	10.3%	10.3%
🇪🇸	18.5%	26.0%	20.9%
🇬🇧	7.8%	8.0%	5.1%

It is becoming a challenging market to hire the best talent

Applications & APV Volumes

2014
15.3% Applications
-2.4% APV

2015
- 1.1% Applications
-11.1% APV
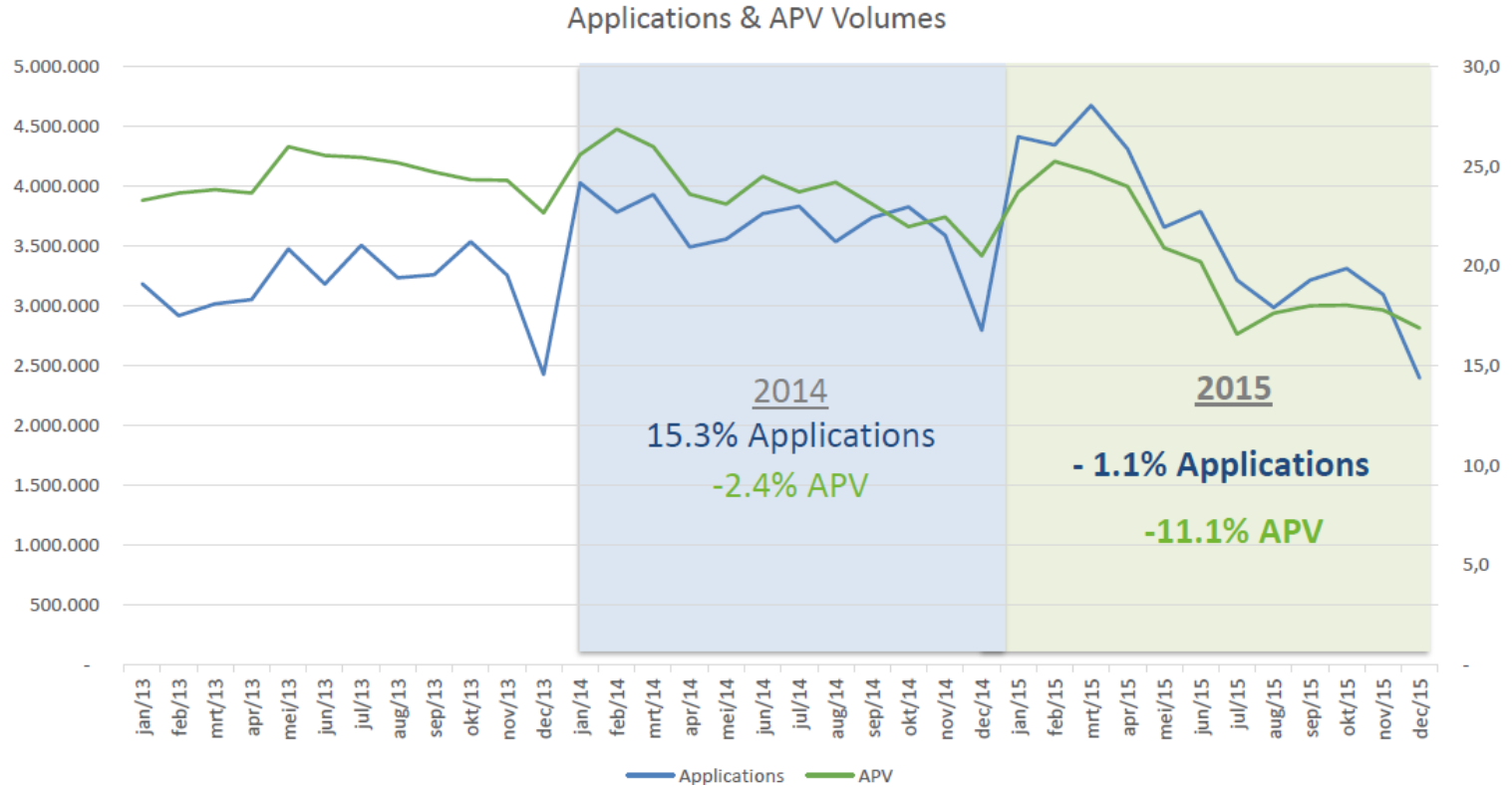
Application per vacancy rates are falling in general...
... but as always the devil is in the detail

Applications per vacancy	APV	2015 Change
Overall Market	16.9	-11.1%
Worst performers		
	3.0	-47%
	8.3	-45%
	32.0	-41%
Best performers		
	17.3	11%
	49.8	8%

broadbean technology

How could/should employers respond to the new dynamic?

Что делать работодателям?

- Focus on candidate experience

- Focus on employer branding

- Adopt more direct sourcing activity

Impact of application process length
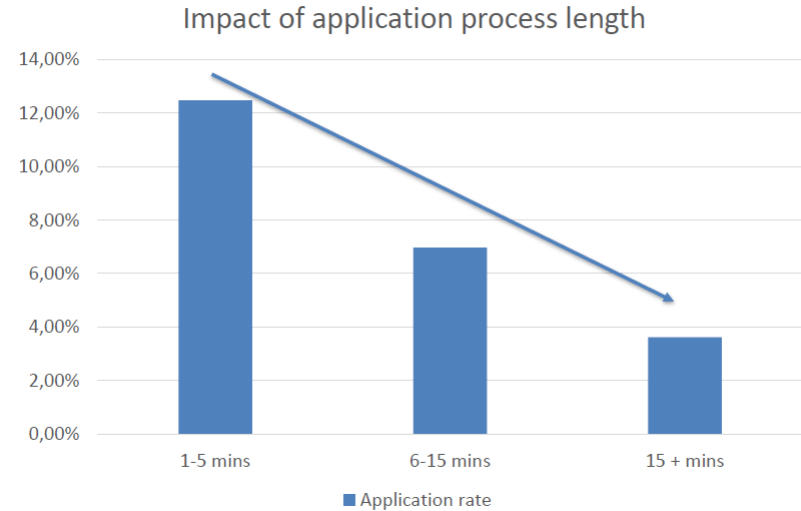
Is the Jobs section of your website optimised for mobile?

Focus on candidate experience
Don't forget the importance of getting the content right

Impact of job title length on application rates

No. Characters

Impact of job description length

No. Characters
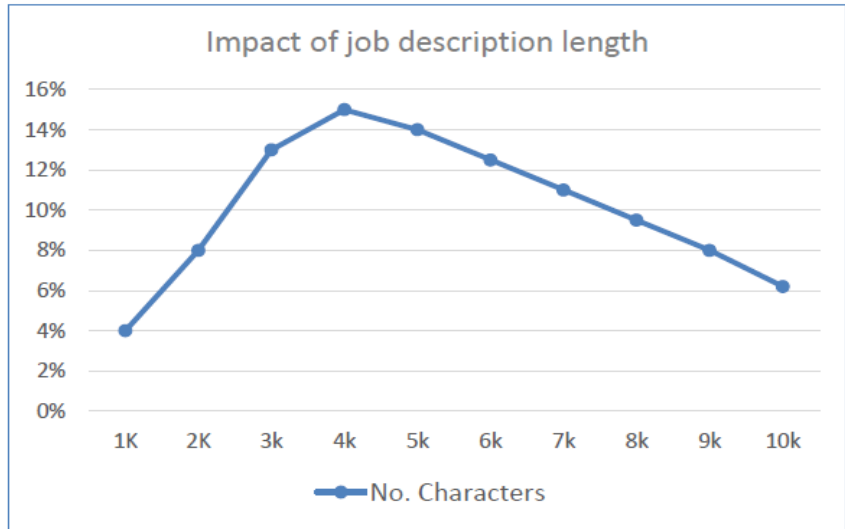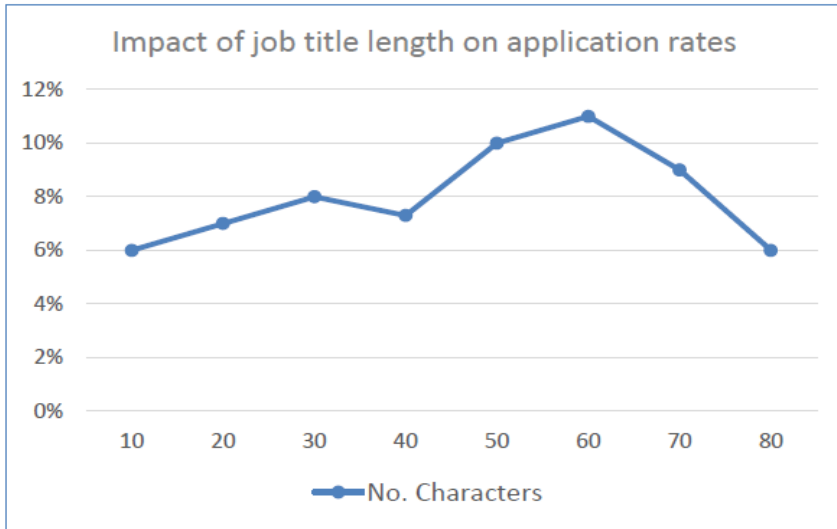
Invest in employer brand
Need to recognize changing candidate expectations

	Career site	Social Media
🇺🇸 USA	80%	70%
🇨🇦 Canada	82%	71%
🇬🇧 UK	81%	63%
🇩🇪 Germany	79%	70%
🇫🇷 France	69%	56%

14.5
Avg research sources

- Focus on mobile, mobile, mobile…… still Мобильные устройства и их пользователи!

- *Must-do in 2016'* Engage with video, video video Видео вакансии, резюме и т.д.! (Pracuj.pl несколько лет назад купил такую платформу)

- Угроза класическим JOB сайтам придет не от LinkedIn.com или Indeed.com, а от новых проектов нацеленых на мобильную молодую аудиторию. модель Тиндеризации (Tinder) (swipe влево не нравится, вправо нравится)

Европа
Active in Spain, London, Paris
Plans to expand throughout Europe
A Round in January: $10 million
Focus on blue-collar, service fields
Swipe right / swipe left
'No. 1 job-search app in Spain'

США
Полусоциальный поиск посменной работы, официанты, курьеры, отели и т.п. С ноября 2015 привлек уже 35 млн. долл. инвестиций!

Мобильная версия стала также важна как и десктопная

50%

Траффик на Glassdoor и на лидирующие Job сайты с мобильных устройств

hh.ru
HeadHunter

Оплата за отклики (не за клики как в Indeed.com)

WORKOPOLIS

- Канада (за отклик),
- Турция (за просмотр отклика),
- Румыния (за принятое приглашение на интервью)

APPLIFY

1. Pay-Per-Applicant
Manage costs by only paying when someone applies.

2. Gain Greater Reach
The Applify Network approach puts your posting in front of more candidates.

3. Easy ROI Tracking
You always know what you're paying for and what you get as a result.

4. No Contracts
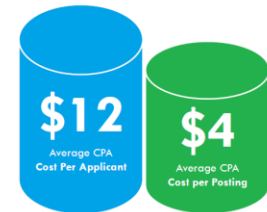You are never locked into a contractual commitment, pay-per-use only.

WHY PAY PER APPLICANT?
The Workopolis story — what about our core "cost per post" offering?

Question: "Are you concerned about cannibalization?"

Answer: **No!**

$12
Average CPA
Cost Per Applicant

$4
Average CPA
Cost per Posting

✓ Currently have 105 clients using the Applify solution representing 2,000+ actively sponsored jobs

Peer opinions are part of the everyday decision making process …. Before buying anything … Before travelling …. Before visiting.
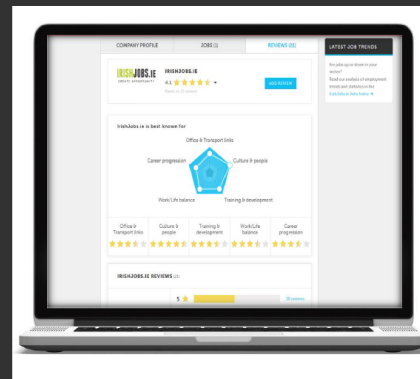
Why not before applying for a job?

Companies are rated on

- Culture & People
- Work/Life Balance
- Training & Development
- Career Progression
- Office and Transport

- The Best Bits
- Areas for Improvement

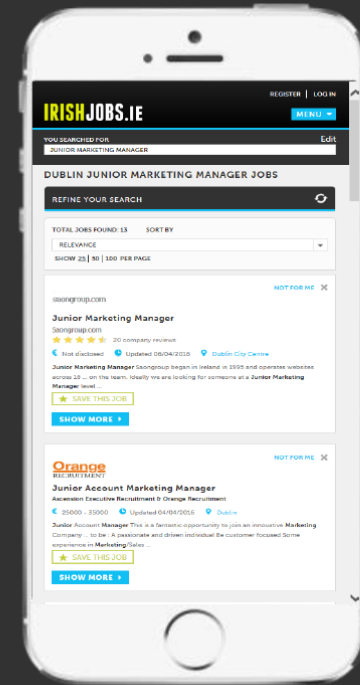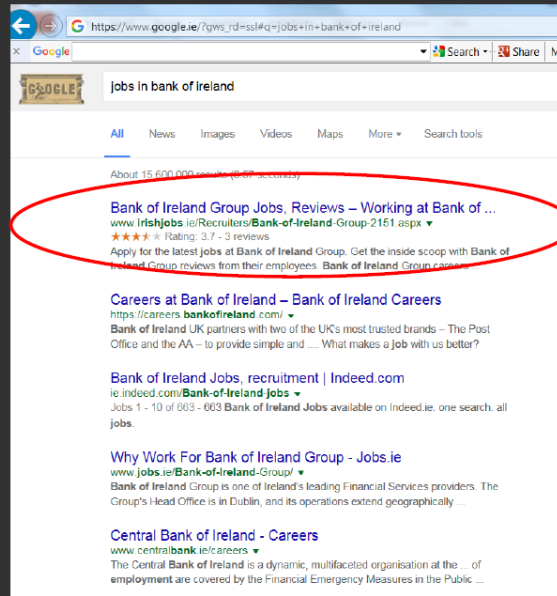- Capturing salary data for Phase 2

Star ratings are surfaced on

- Company profiles

- Search results >3 stars

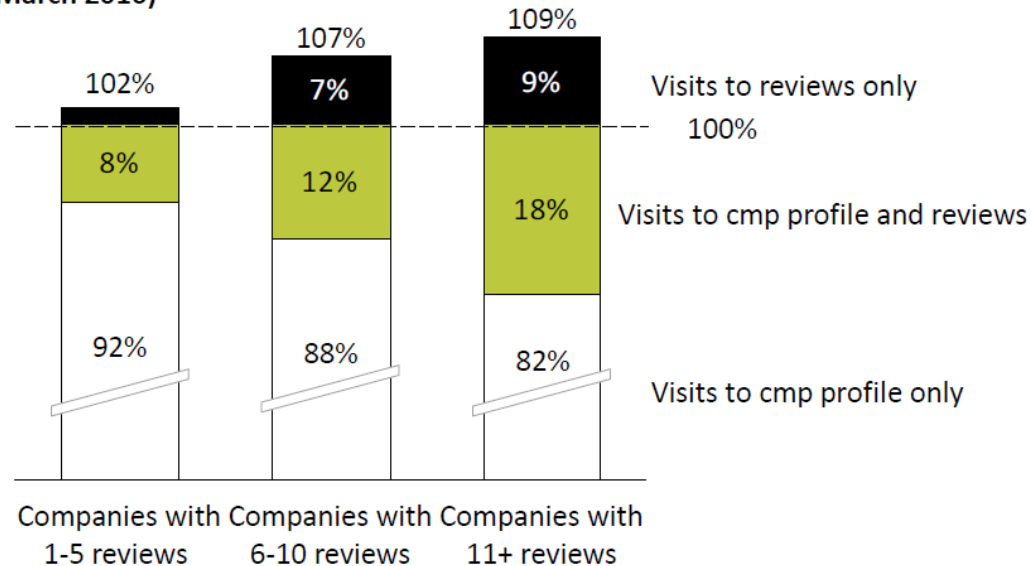- Jobs descriptions >3 stars

What have we learned?

- Company reviews are SEO friendly. This taps into the growing trend for jobseekers to search for jobs by company name

What have we learned?

- Some customers are scared of reviews, but most see the value of better matched candidates and greater visibility for their profile

Visits to company profile and review pages by number of reviews (March 2016)

|		
102%	107%	109%
8%	7%	9% — Visits to reviews only
	12%	18% — Visits to cmp profile and reviews
92%	88%	82% — Visits to cmp profile only
Companies with 1-5 reviews	Companies with 6-10 reviews	Companies with 11+ reviews

Review content is highly effective in driving new users to company pages. As review content grows, we see an increase in visitors to company review and profile pages.

DATA SCIENCE – работа с Big Data, для мэтчинга кандидатов и вакансий

Также известно как Machine Learning, Artificial Intelligence or Big Data, Data Science

RESUME AND JOB POST ARE DECOMPOSED TO UNDERSTAND THE FIT ON HARD SKILLS
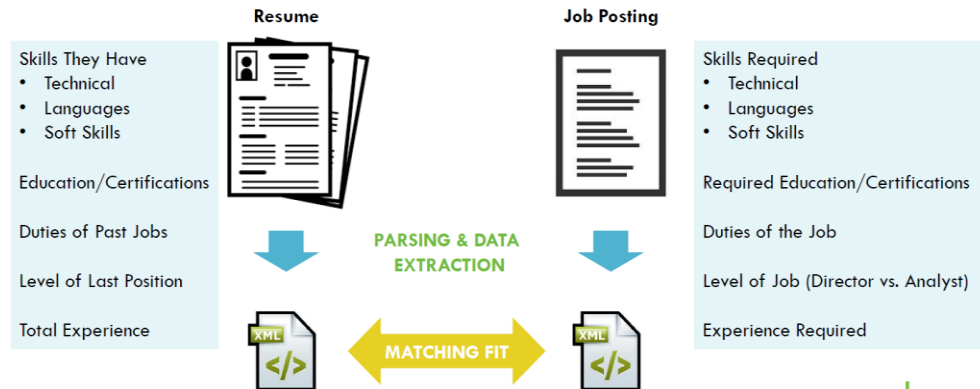
Data Scientist

LOBLAW COMPANIES LIMITED, Toronto, ON, CANADA

Loblaw Digital is the team responsible for building and operating e-commerce businesses for Canada's largest and most successful retailer. So far we've created leading responsive e-commerce experiences for Loblaws Click & Collect (shop.loblaws.ca), Shoppers Drug Mart beautyBOUTIQUE (beautyboutique.ca), and Joe Fresh (joefresh.com), with much more to come.

We are based in downtown Toronto and operate like a start-up with extensive resources. We are an entrepreneurial, fast-paced, collaborate, and fun team working to transform the way Canadians shop.

To achieve this goal, we are looking for talented and passionate individuals who want to solve challenging problems and make a significant and lasting impact on Canadians.

A successful candidate must have hands-on experience working with Hadoop Big Data ecosystem (HDFS, Map/Reduce, Hive, Hbase, Sqoop, etc.), with a deep understanding of data mining and analytical and quantitative concepts, and machine learning techniques.

Duties And Responsibilities

. Research innovative data solutions and solve real market problems
. Develop analytical approaches to meet business requirements
. Continue to implement data pipeline to ingest, clean, aggregate, and integrate data from various data sources
. Work with distributed computing tools (HDFS, Map/Reduce, Hive, Hbase, Sqoop, etc.)
. Support business decisions with ad hoc analysis as needed, and communicate findings to senior management
. Work with the Technology team in delivering Data Science projects into production

Accommodation is available upon request for applicants and colleagues with disabilities.

Job Qualifications

. Degree in a quantitative discipline such as Computer Engineering/Science, Statistics, Machine Learning, Applied Math, or equivalent work experience. Masters/PhD preferred.
. Strong understanding of big data concepts and hands-on experience in working with Hadoop, MapReduce, Hive, Hbase and related big data technologies
. Strong knowledge/experience using machine learning tools and algorithms
. Proficiency with Java, SQL, and python
. Creative problem solver, resourceful in getting things done, and productive working independently or collaboratively
. Strong passion for analytics and data mining to drive business decisions
. Ability to communicate complex quantitative analysis in a clear, precise, and actionable manner

Here are just some of the things Loblaw colleagues enjoy:

. 10% Colleague Discount Program on eligible products sold at Loblaw stores.
. Ongoing career development through in-house training programs, tuition assistance and support for

91%

| Education |
| Work Experience |
| Qualifications |
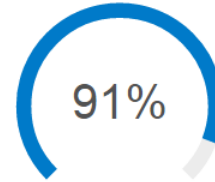
Summary of This Position

Skills

✓ • Data science and big-data skills (Hadoop ecosystem)

✓ • Proficiency with Java, SQL and Python

✓ • Problem solving and teamwork spirit

✓ • Research skills

Work Experience

✓ • None

Education

✓ • Degrees in Math, Statistics or Computer Science; Masters or Ph.D. preferred

AVP, Data Scientist

SUN LIFE FINANCIAL, Toronto, ON, CANADA

Job Description

Sun Life Financial is looking to hire an advanced and experienced Data Scientist who has deep knowledge and expertise in both supervised and unsupervised predictive analytics algorithms with the ability to apply these skills to solve business problems. Superior quantitative, technical and communication skills are needed to be successful in interacting deeply with business units as well as other professionals in the I/T and the Insurance Research Lab. This position reports directly to the Global Head of Reinsurance and Insurance Risk & Research.

This role will focus on modeling complex problems, discovering insights and identifying opportunities through the use of statistical, algorithmic, mining and visualization techniques.

Additional responsibilities of the role will include:

Modelling

- Develops innovative and effective approaches to solve the business unit's analytics problems and communicates results and methodologies.
- Renowned expertise in the vast catalogue of industry data models and approaches and can recommend appropriate approach based on the business problem.
- Works in iterative processes and validates findings.
- Develops experimental design approaches to validate finding or test hypotheses.
- Validates analysis using scenario modeling.
- Identifies/creates the appropriate algorithm to discover patterns.

Data Preparation and Sourcing

- Identifies data relevance, availability and integrity, including internal and external data sources, leveraging new data collection processes.
- Collaborates with subject matter experts to select the relevant sources of information.
- Makes strategic recommendations on data collection, integration and retention requirements incorporating business requirements and knowledge of best practices.

Data Understanding

- Leads discovery processes with stakeholders to identify the business requirements and the expected outcome.
- Using an iterative and dynamic process, suggests other products and queries of interest to the business unit.
- Models and frames business scenarios that are meaningful and which impact on critical business unit processes and/or decisions.

Evaluation and Deployment

- Defines the validity of the information, how long the information is meaningful, and what other information it is related to.
- Provides metrics for the overall project to show improvements.
- Presents and depicts the rationale of their findings in easy to understand terms for the business.
- Educates the organization both from a data and the business perspectives on new approaches, such as testing hypothesis and statistical validation of results.
- Helps the organization understand the principles and the math behind the process to drive organizational buy in.

55%

Education	
Work Experience	
Qualifications	
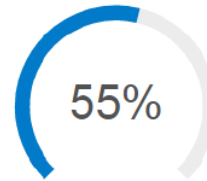
Summary of This Position

Skills

- Data science and big-data skills ✓
- Programming skills in Java framework ✓
- Data modeling using SAS, R or Matlab ✗
- Actuarial knowledge preferred ✗
- Research skills ✓

Work Experience

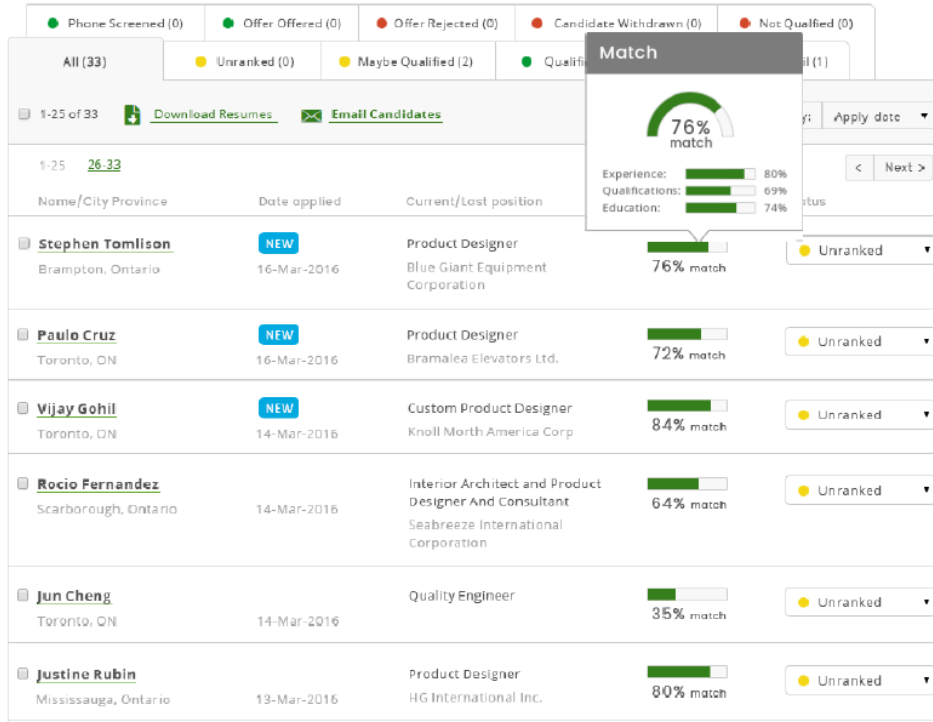- 5+ years of experience of Analytics ?

Education

- Masters in Math, Statistics or Computer Science; Ph.D. degree preferred ✓

# MATCHING SAVES EMPLOYER SCREENING TIME

Applicants for Product Designer

Phone Screened (0)	Offer Offered (0)	Offer Rejected (0)	Candidate Withdrawn (0)	Not Qualified (0)

| All (33) | Unranked (0) | Maybe Qualified (2) | Qualifi... | ...l (1) |

☐ 1-25 of 33   📄 Download Resumes   ✉ Email Candidates   ...y: Apply date ▾

Match

76% match

Experience:	80%
Qualifications:	69%
Education:	74%

1-25   26-33   < | Next >

Name/City Province	Date applied	Current/Last position		...tus
Stephen Tomlison Brampton, Ontario	NEW 16-Mar-2016	Product Designer Blue Giant Equipment Corporation	76% match	● Unranked ▾
Paulo Cruz Toronto, ON	NEW 16-Mar-2016	Product Designer Bramalea Elevators Ltd.	72% match	● Unranked ▾
Vijay Gohil Toronto, ON	NEW 14-Mar-2016	Custom Product Designer Knoll North America Corp	84% match	● Unranked ▾
Rocio Fernandez Scarborough, Ontario	14-Mar-2016	Interior Architect and Product Designer And Consultant Seabreeze International Corporation	64% match	● Unranked ▾
Jun Cheng Toronto, ON	14-Mar-2016	Quality Engineer	35% match	● Unranked ▾
Justine Rubin Mississauga, Ontario	13-Mar-2016	Product Designer HG International Inc.	80% match	● Unranked ▾

Features:

- The platform assesses the 'fit' between a candidate and a job
- We sort the pile of resumes, ensuring that recruiters only have to review the top 30%
- Resume view provides greater candidate insight, e.g. detailed skills assessment

Application:

- Encourage small and medium employers to use our tools for recruiting, instead of email apply
  - Provides critical insights into usage rates and recruiting behaviour
  - Opportunities for cross-sell and upsell
- Provide value-added functionality for our subscription bundles, thus driving renewal rates

WORKOPOLIS

EXPLORE REAL-WORLD CAREER PATHS
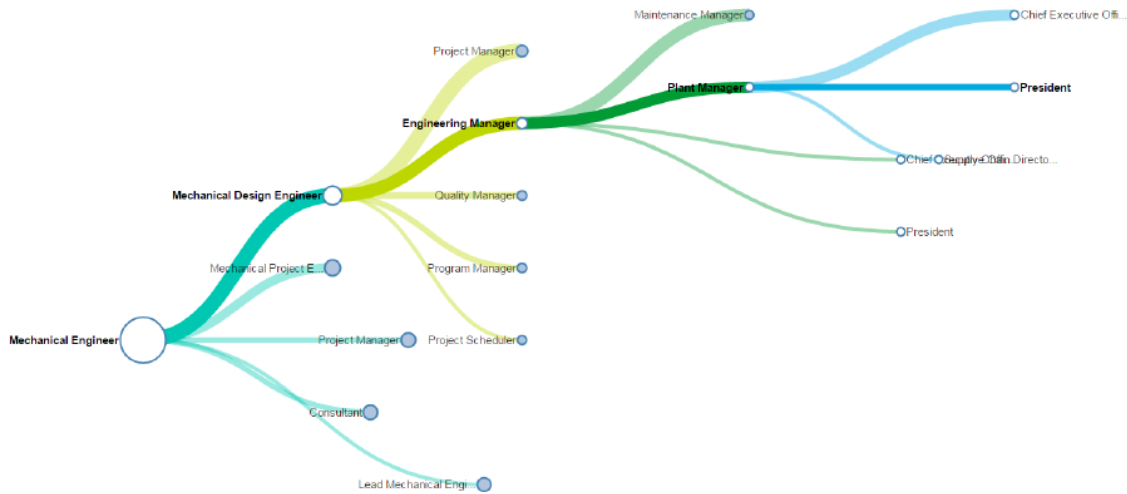
Features:

- Based on millions of resumes, parsed for education, job title and tenure
- Shows most possible career paths and time to attain next promotion

Application:

- Interactive tool aimed at younger job seekers who are making career and education choices
- Useful for guidance counselors or educational institutions promoting their programs
- Drives seeker engagement, including repeat visits, shares, careers and job searches

Навыки в LinkedIn и в hh.ru и на chooseourboss.com

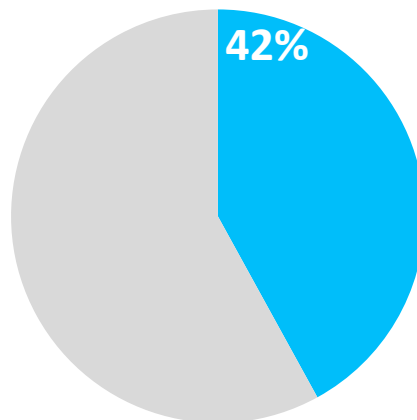# Автоматизация подбора через ATS в Европе

ATS share of total applications (by StepStone)
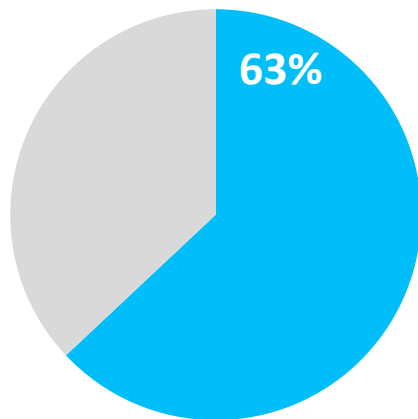
Belgium	Germany	United Kingdom
63%	42%	45%

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HeadHunter
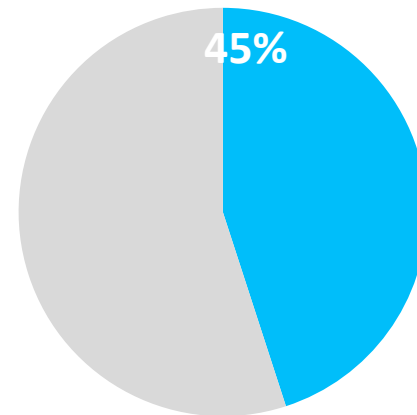
Автоматизация рекрутмента становится интересной для «Больших игроков» по автоматизации бизнеса

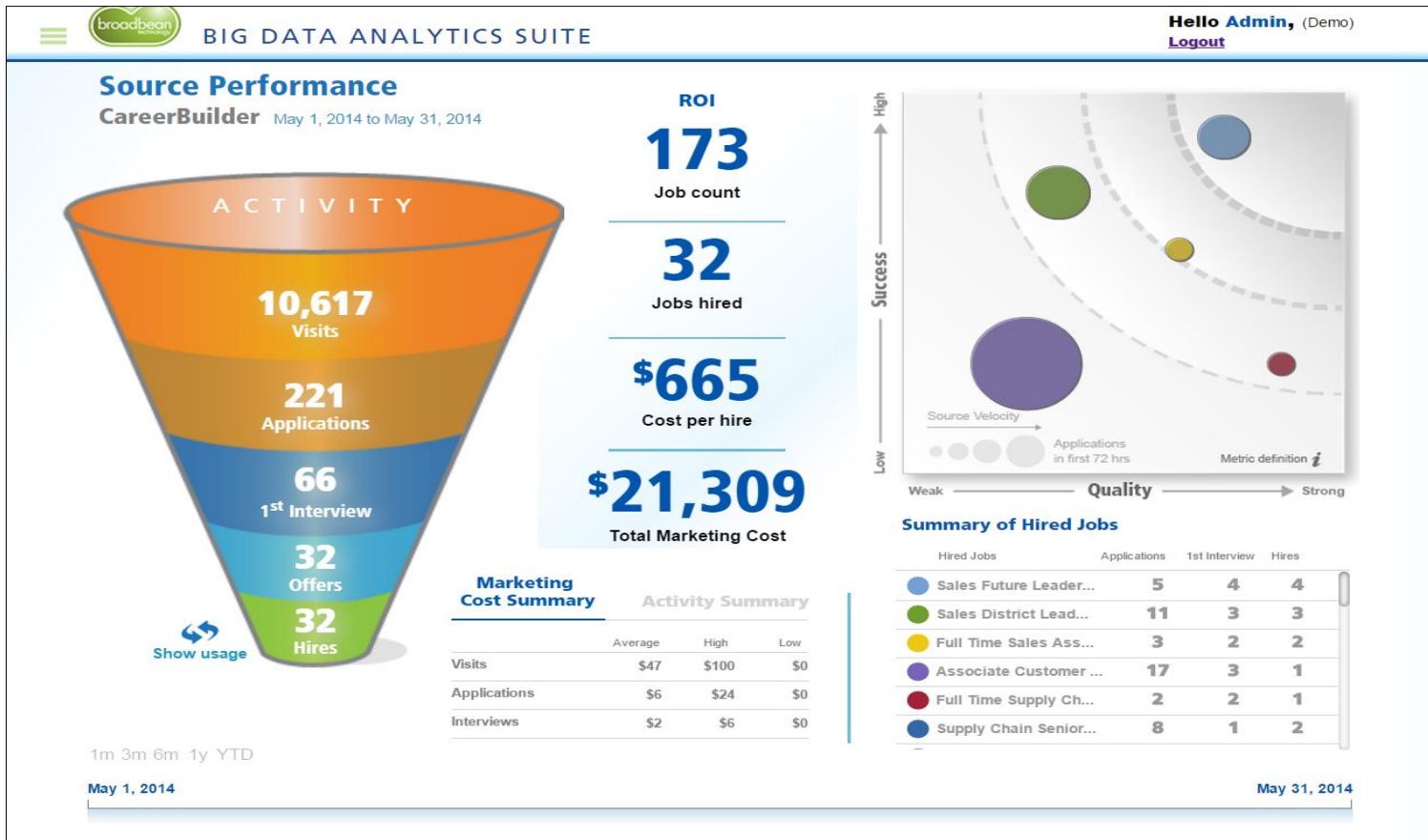| ORACLE | Taleo | $1.9 Billion |
| SAP | successfactors An SAP Company | $3.4 Billion |
| IBM | Kenexa | $1.3 Billion |

hh.ru
HeadHunter

Анализ эффективности рекрутмента

Благодарю за внимание!

Директор по электронной коммерции компании Хэдхантер

Облов Андрей

a.oblov@hh.ru

hh.ru
HeadHunter