seeking and finding work in the labour market

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contents

01

background

Research into how job seekers search for and find a job, and how companies search for workers and find them, is relevant for many reasons.

Firstly, such research gives deeper insight into how the job market actually works. When the search and find methods for job seekers and companies are closely connected, the chances of finding a match are greater. The search and find behaviour also evolves over time, companies and job seekers influence each other on this point. Some channels disappear, new channels appear and existing channels change character. These changes happen slowly over time.

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This type of research is also policy relevant. The ideas developed in the 70s about the importance of informal channels in the job market (e.g. Granovetter, 1974, etc.) as well as the extensive follow-up studies on the role of social networks contributed, for example, to inspiring the development of programmes to support job seekers in their search for work. Many studies found that these channels were not always the most utilised but were in many cases the most effective. Even more policy relevant is the insight that it delivers in light of the activation policy of the last 20 years, which is after all the leading principle in the employment market.

Moreover, such research offers relevant data about the impact of public employment services (PES). As public figures, they have been given a crucial role both nationally and internationally (ILO, OECD, EU, etc.) in the context of an active labour market policy. Furthermore, in some cases, they use up ample public funds. It is therefore quite logical that this should lead to a reasonable share of the market for public intermediaries. What can be considered reasonable is up for discussion and always depends on political expectations and use of resources.[1]

This type of study also emphasises the impact of private players (temporary work agencies, recruitment and selection, executive search, etc.) on the labour market. This is also important for policymakers. From a historical perspective, the growing impact of private employment services (PRES) was relatively crucial in the elimination of the public monopoly on employment services at the end of the last century and the adoption of Convention 181 by the International Labour Organisation.[2]

1 Historically, the main task of the PES, aside from the payment of unemployment benefits, has undoubtedly been the regulation of offer and demand on the labour market, but over time the mission in most countries has become much broader and the differences between countries can be large. The OECD foresees 5 broad assignments for the public figure.

- gathering labour market information (vacancies and job seekers)
- work placement services
- implementation of labour market policies
- payment of unemployment benefits
- implementation of (im)migration policies.

2 This Convention abolished the public employment services monopoly in 1997.

in the meantime, it also became clear that, in most of the developed countries, the impact of private intermediaries on the labour market is not inferior to that of public players, on the contrary.

This growing impact forced the organisation into a paradigm shift in which the PRES was no longer considered a necessary evil but, on the contrary, as a (more than) necessary complement to the public initiative in light of an ever more complex labour market. Later, this type of study in Belgium also made it clear that the growth of private employment services did not happen at the cost of public services. Previously, this concern had been a very important reason for establishing the public employment services monopoly and then for maintaining it for a considerable time.

In the meantime, it also became clear that, in most developed countries, the impact of the PRES on the labour market was not inferior to that of the PES, on the contrary. This study provides new supporting data. This insight led the policymakers in several countries to allow the private sector to also play a role in the implementation of the labour market policies.[3]

Of course, the most important new development is the arrival and development of internet or digital players (job sites, social media). This development is not really so recent, given that it is already a quarter of a century old. A British study showed that in 2009 already 80% of job seekers were searching through the internet. (Green and others, 2011). Besides, the digitalisation of the employment market, in general, can be seen not only with the arrival of new players but also in that the traditional players are also going digital in many different ways.

3 The strongest example of this comes from Australia where, at the end of the 90s, it was decided to terminate the PES and to replace it by a network of private and public providers that were expected to win assignments from the government via tenders. 20 years later the system is still in place and there are no indications that anyone wants to go back to the old system.

Another example comes from Belgium, where the Employment Minister in 2004, Frank Vandenbroucke, purposely included Temporary Work agencies in the launch of the system of (Service Vouchers) for home cleaning.

This doesn't detract from the fact that it is interesting to gain insight into the impact of digital job sites, on the one hand, and social media platforms, on the other hand. The most important development here is the arrival of algorithms that automatically match offer and demand and applications that allow individuals to connect and interact using their smartphone. According to Osborne & Frey (2015), the position of job consultant was one of the functions that could be completely digitalised in the near future.

In any case, it is remarkable that with the breakthrough of the PRES 30-40 years ago (with temporary work agencies leading the way), many government bodies went to a lot of efforts to monitor/control this new sector. This was seen as strictly necessary for maintaining good order in the employment market. This is no longer the case in this era of digital players. Nonetheless, their impact (measured purely in the number of jobs filled using this channel) is probably not less than that of the traditional players. It is clear that by decreasing the costs of the search, digitalisation has certainly increased the use of all search channels. (Stevenson, 2008). Another possible impact of these new players could be the stimulation of more mobility in the job market. At the very least, digital players make the search for work easier. In many cases the digital players will even draw the attention of job seekers to new vacancies. Through the use of algorithms, digital players can also be quite discriminatory without realising it, especially in the cases where the algorithms are self-learning. With regard to discrimination, government and activists always have a critical eye on the traditional employment intermediaries, albeit mostly the PRES, but much less, or none at all, on the purely digital players.

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Finally, this type of study allows us to evaluate to what extent we can now really speak of disintermediation on the employment market. This disintermediation can be found in various areas of the economy. The traditional intermediary between producer and consumer is disappearing due to the arrival of digital networks (Tapscott, 2015).[4]

4 Readers of the original Tapscott text will notice that the author's description of disintermediation is much more nuanced than in later, more popularised versions. Tapscott writes 'Middle businesses, functions and people need to move up the value chain to create new value or they face being disintermediated'. The disintermediation does not occur automatically but is reliant upon the new value that the intermediary creates.

02

introduction

the most obvious question is what impact do these digital networks have at this time.

How companies search for employees on the labour market and how job seekers search for a new job remains an interesting but strongly underexposed research topic.

Both companies and job seekers use a broad range of channels to search for and find work. Just knowing which channels are used by whom and how successful they are, provides important information to all the stakeholders in the job market.

Historically, a distinction was made between formal (PES and PRES etc.) and informal channels (friends and acquaintances, spontaneous applications). Today, in 2019, a third category has been added: the digital networks which may be considered either formal or informal according to their approach. The most obvious question is what impact do these digital networks have at this time. How often are they used as a search resource and, more importantly, how often do they lead to a new job, whether in combination with another channel or not?

To answer this question, we are using the research data that was gathered in the context of the Randstad Employer Brand Research.[5]

We first asked the respondents if they had changed jobs in the previous year, either within or outside the organisation. We then asked if they were planning to change in the coming year. Next, we asked which channels they had used to search for a job and through which channels they had eventually found a new job. Naturally, several choices were possible.

5 This study analyses the attractiveness of large private employers. The study was developed in Belgium in 2001 and was later expanded to 32 countries on 4 continents. (Randstad, 2019). The following countries are involved: Belgium, France, Netherlands, Germany, Poland, Spain, UK, Italy, Australia, New Zealand, India, Japan, Singapore, Canada, USA, Argentina, Hong Kong, China, Switzerland, Hungary, Sweden, Russia, Portugal, Malaysia, Luxembourg, Brazil, Greece, Czechia, Austria, Norway, Romania, Ukraine. In some countries the number of respondents is rather limited, see appendix (pg. 33). The research was carried out at the end of 2018/ beginning 2019 by Kantar, commissioned by Randstad Holding.

03

changing jobs (internally or externally, actually or intentionally)

According to the workers themselves, the proportion that have changed jobs during the last year is 26%. In 19% of cases, it was an external change. In 7% of cases, it was a change of job within the company.

These numbers seem to confirm the idea that companies tend to look to the outside to fill vacancies and disregard internal talent. On the other hand, it is quite logical that internal mobility is somewhat lower than external. The external possibilities for fulfilling a new job are many times greater than the internal. In many small companies, the possibility of changing jobs internally is very limited.

Naturally, there are large differences internationally. We note the highest numbers in India where no less than 42% indicate they have changed jobs, 29% externally and on top of this 13% internally. In both cases, these are the highest numbers. Hong Kong also shows high numbers (respectively 27% and 10%). Brazil shows an average score for external mobility (20%) but just above average for internal mobility (12%). The same is true although in reverse for China (16% and 11%). The other extreme is Japan where external mobility barely reaches 11% and internal mobility is 6%. The European countries, the USA and Canada and New Zealand fall between these extremes. We find the highest external mobility in Europe in Russia, Sweden, Hungary and Ukraine (23%). Australia also achieves this score. Internal mobility in Europe, other than Sweden (11%), is no higher than 9% (Norway). The lowest external mobility in Europe is for Luxembourg (9%) and Belgium (14%). Belgium also scores very low on internal mobility (5%) next to Austria (4%). Many other European countries also only reach 5% (Netherlands, Germany, Italy, Switzerland, Portugal, Luxembourg, Czechia and Ukraine). Of the non-European countries, only the USA, surprisingly, shows such a low number (5%).

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Only one variable shows a variation regarding external mobility: age. It appears, as expected, that external mobility decreases significantly after a certain age. As we know, the turning point is very low: at best 34 years old. In the 25-34 age group, 26% is still changing jobs externally, in the 35-54 age group it is still 14%. After the age of 55, this decreases to 8%. There is no difference between men and women and the same is true for different levels of qualifications. It is likely that voluntary mobility is higher in the higher qualified group and involuntary mobility is lower in the less qualified group. These phenomena compensate each other. We also observe largely the same pattern with internal mobility. After the age of 34, internal mobility in the company strongly decreases. After 55 it becomes almost inexistent (3%). In this instance, we do see a difference according to the level of qualifications. People with higher qualifications change their jobs internally more frequently than people with lower qualifications (9% versus 5%).

only 8 of the 32 countries researched combine an average higher external mobility with an average lower internal mobility or vice versa.

We note quite a strong consistency between external and internal mobility, although it is perhaps not what is expected. In theory, there are several possible consistencies. Strong external mobility could be consistent with weak internal mobility. Employees would then be leaving because they do not have enough opportunities internally.[6] Conversely, countries with a strong internal employment market (and therefore high internal mobility) could demonstrate low external mobility. However, neither phenomenon appears in the numbers. Only 8 of the 32 countries researched combine a higher average external mobility with a lower average internal mobility or vice versa (U.S.A., China, Switzerland, Portugal, Czechia, Norway, Romania and Ukraine). An employer wishing to encourage more internal mobility could unintentionally encourage external mobility. It looks like changing jobs internally in fact also lowers in many cases the threshold for changing externally.

As expected, the intention to change is higher than the actual change. 28% express the wish to change externally, 11% wish to change internally. In both cases, the level of intention lies around 50% higher. We also have to take into account that the actual changes from the previous year were not always voluntary (therefore probably not intentional). It is a well-known fact that intentions don't necessarily always lead to actions. There are a number of inhibiting factors and practical obstacles that can get in the way. People do not always turn intentions into actions, their intentions may change and there is no guarantee of success even if actions are taken. People who express their wish to change jobs internally within a company will not necessarily (immediately) have their wish granted. In the same way, the search for work outside of the company can also fail.

On the other hand, a person may have no intention of changing jobs but an event happens that leads to a change. These days it is sufficient to be registered on LinkedIn to be contacted for a change of job. These people are often not even actively searching for work.

6 Within HR circles it is a generally accepted principle. See e.g. Robin Erickson (2018) Are you overlooking your greatest source of talent? Deloitte Insights.

Through social media sites such as LinkedIn, the group of passive job seekers has by definition strongly increased. It's also true that the threshold for actively seeking work oneself has been lowered thanks to social media and job sites. Yet there are still few or no indications that this has increased the (voluntary) mobility on the labour market. This also means that popular ideas such as 'changing is the new normal' (Gershon, 2017) should be taken with a serious pinch of salt. The development of voluntary mobility is a little strange when compared to the job seeking behaviour that has indeed increased since the crisis of 2009. However, here again, for example in Belgium, we are far below the levels of 1999 and 2000 (Hendrickx, 2018). Internet jobsites therefore probably don't automatically lead to more structurally intensive search behaviour. This means that although internet jobsites have already had a positive impact on search behaviour and mobility, this has been more than countered by other forces such as ageing.

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As far as intentions are concerned, age is a varying variable. In the group aged up to 34 years old, 34% still think they will change jobs externally in the next year. After 34, this decreases to 24%. After 55 it goes down even further to 13%. The same is true for the intentions regarding internal job mobility. After 55, there is almost no difference between actual mobility and intentions (respectively 3% and 4%).

Although there doesn't appear to be any significant difference between lower and higher levels of education, regarding external mobility, we can see a difference regarding intentions. These are higher for people with higher qualifications (30% versus 23% for lower qualifications). This is also true for internal mobility (13% versus 8%).

We also note a strong link between actually changing jobs (internally and externally) and the intention to change jobs in the future. In countries with higher external and internal mobility, the workers also expressed a higher level of intention to change jobs externally or internally in the near future.

04

how do people search for new work?

People who found new work last year or who were planning to look for new work were asked how they had searched and, in the case they found a new job, how they had found a new job. In both cases, more than one channel could be indicated, but logically, more search channels are ticked than find channels.

the different search and find channels on the labour market

There is no generally accepted classification tool for search and find channels on the labour market. A number of channels reappear every time and everywhere: Public Employment Services (PES) and Private Employment Services (PRES). For the latter and for this research, we are looking at the distinction between the recruitment and selection/search and staffing companies. In practice, there will certainly be some overlap because a lot of temporary employment companies also offer recruitment and selection as a service. Furthermore, there are, of course, also personal connections and referrals. In this case, there is sometimes a distinction between family, friends and acquaintances. Then, there are job advertisements. Historically, these were to be found in various printed media. In many studies, they turned out to be the most used search channel. Today, this channel has become largely digitalised. In Belgium, these printed advertisements have been around for a long time, and even now, they haven't yet disappeared. That doesn't mean to say that in Belgium too, their role has been taken over by job portals. Aside from the jobportals (Indeed, Monster, etc.), there is, of course, social media where international companies such as Google, Facebook, LinkedIn and Twitter are the most important, supplemented in some countries with (very) large national players (China, Germany, Australia, etc.). Historically, spontaneous applications also played an important role. This channel has also largely been digitalised. Whereas spontaneous applications were previously carried out in the form of sending CV's (by post) or spontaneously presenting oneself to the company, nowadays this has largely been replaced by reacting digitally (often to job offers) on company websites. Not forgetting job fairs that come in a variety of forms and also remain very relevant internationally in these digital times. Those who take a broader perspective can also add schools and universities to this list. Often, this takes place through the job fairs mentioned above.

That leads us to the following 11 retained channels.[7]

- recruitment agencies/search
- staffing companies
- public employment services
- job portals
- job fairs
- personal connections/referrals
- company (web)sites
- google
- linkedin
- facebook
- twitter

7 The channels retained for this study are only the ones that are deployed internationally and in the majority of countries covered; local channels are not included.

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Job portals are, without dispute, the most-used channel worldwide to search for jobs at this time. No less than 59% of all respondents worldwide searched using this channel in the past year. Only in 5 countries it was not the most widely used search channel: France, Belgium and Sweden, where PES is the most important search channel, Greece where personal connections weighed in more heavily, and India where LinkedIn and Google just beat the job portals. The highest scores are found in Ukraine (79%), Portugal (77%) New Zealand (74%), Spain and Malaysia (73%), and Russia (71%). Job portals are used for searching more by women than men worldwide (64% versus 54%). Regarding age, there is no difference. 59% of people over 55 also used this channel last year. Regarding education, there is a difference. People with a lower level of education make less use of it than the medium and higher levels (51% versus 64% and 59%).

personal connections (references) and digital company websites

Personal connections (references) (41%) and digital company websites (40%) come reasonably close to the job portals. In terms of connections/references, scores from different countries vary greatly. Japan (17%) in Asia and the UK in Europe (25%) have the lowest scores. Greece (71%!), various Eastern European countries such as Ukraine (64%), Hungary (60%) and Russia (57%) and somewhat surprisingly, the Netherlands (57%) score the highest. Connections/references gain in importance as age increases (54% at 55+ versus 40% for those under 35). The medium and the highly qualified are also clearly found to be looking more via personal connections and references than the lesser qualified (42% and 43% versus 34%). On digital company websites, the scores also vary within reason. From only 20% to 21% in France and Russia to 57% and 56% in Russia and Greece. Company websites are mainly used by the highly qualified (46% versus 26% for the less qualified).

recruitment/search companies and google

In shared place, we find recruitment/search companies and Google with 35% each. In recruitment/search the national scores are also extremely varied with top scores in China and Singapore (62% and 55%) and very low scores in Italy (8%), Ukraine (13%), and Russia (16%). For Google, most country's scores are reasonably close to the global average of 35%. It is in Asia that extreme variations are to be found. For India, the results are positive (54%). India is the only country where Google is already the most used search channel after LinkedIn. Whereas in Japan and China, the results are more negative (13% and 11%). As with most search channels, there is little to no difference between men and women. However, there is a strong age impact, with 46% for the under 25 year olds versus 19% for the 55+ group. It is also mainly the low and medium qualified people who use Google (39% and 41% versus 28% for the highly qualified). But with 28% among the highly qualified, Google falls barely below LinkedIn for the same group (31%).

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linkedin

LinkedIn can be found in sixth place worldwide, with an average score of 29%. The lowest scores are once again in China and Japan (respectively 11% and 3%). In Europe, most Eastern European countries score low (Russia barely 5%), but also Germany (14%). In that country, local players have a strong market share. In contrast, in Europe, there are high scores in the Netherlands (49%!) and Spain (42%). The highest score is in India (59%). There are not many differences between the sub-groups. Only the lesser-qualified deviate in a negative way (19%).

staffing companies

Staffing companies have a market share of 26%. Combined with the share of recruiting companies (35%), the PRES (private employment agencies) have a share of 61%. Even if we take into account a certain overlap between recruitment and staffing, it is clear that the market share of the PRES search channel is quite a bit higher than the PES, the latter having to be content with eighth place. The highest shares are found in Italy (50%) and China (44%). In some countries, the market share is nil (e.g. Poland, Hong Kong, Czech Republic, Ukraine). Presumably, in those countries, the overlap with recruitment companies is very strong. Differences between subgroups are limited.

Job fairs account for 23%. China is a strong outlier here, with 49%. In New Zealand (6%) Switzerland (7%) and Italy too (8%), this channel is virtually non-existent. Job fairs are much less used by the 55+ group (16%). In the case of highly qualified workers, it's the reverse (30%).

facebook achieves the highest market share in search behaviour in hungary (43%), whereas the lowest is in japan (5%) and russia (7%).

PES

PES can be found in ninth place with a market share of 21%. In a number of European countries, the channel plays a prominent role with shares of 50% or more (Belgium, France, Sweden and Austria). Norway accounts for 49%. In North America, we see a big difference between the US (9%) and Canada (36%). In Japan, too, the public intermediary obtains a reasonable market share (37%). With surprisingly low shares, the PES in Germany and the Netherlands reach 18% and 10%. If we put PES up against PRES, the conclusion is very clear. In almost all countries, the latter has a larger market share. The exceptions can be found in Eastern Europe: Poland, Russia and Ukraine.

A little worrying is the even lower market share among young people (15%). In contrast to what is often assumed, the differences between qualification levels are small. The difference between less qualified and highly qualified workers is irrelevant (24% versus 21%).

facebook and twitter

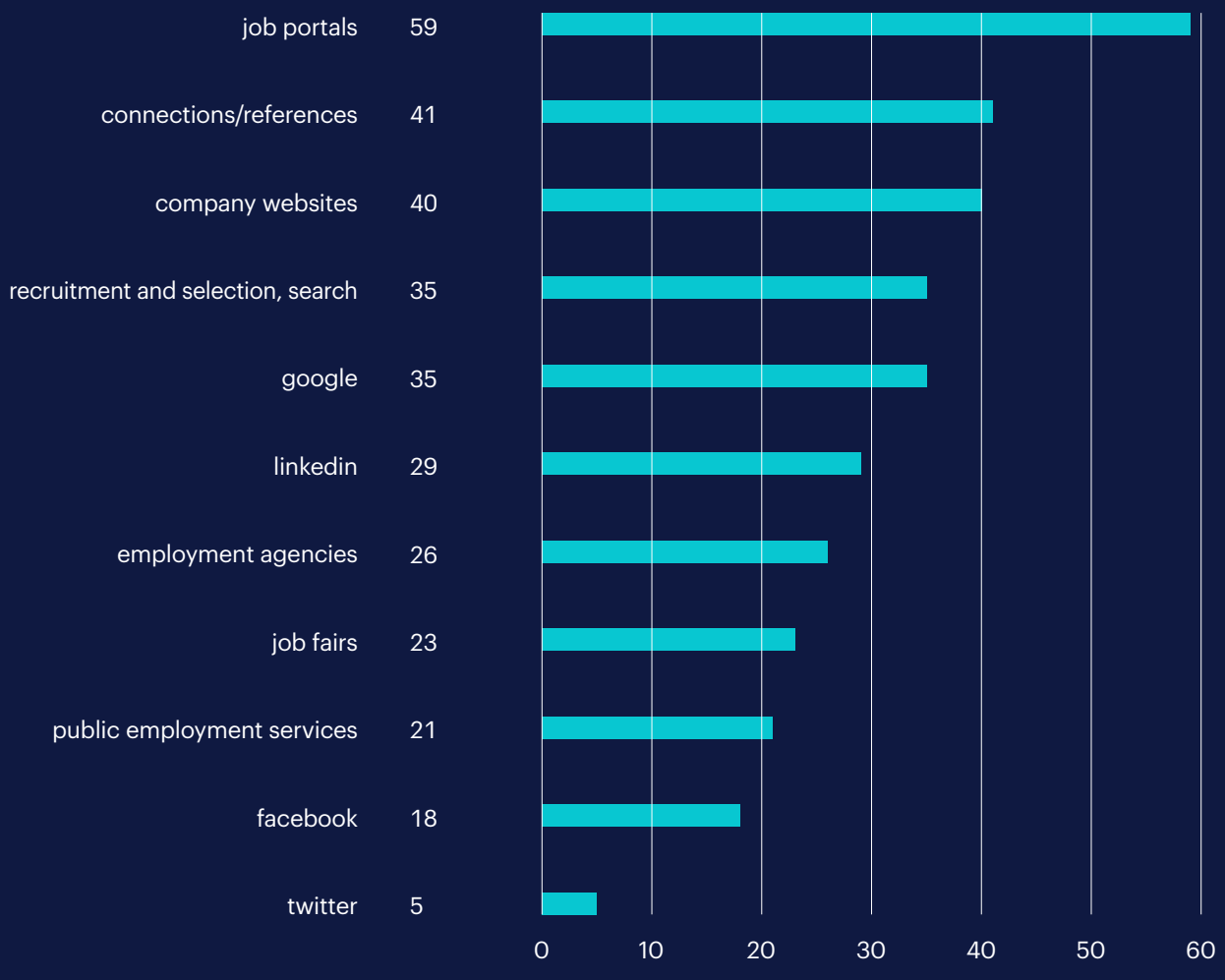
The list concludes with two important social media: Facebook and Twitter (respectively 18% and 5%). Combined with Google and LinkedIn, these media account for as much as 87%. However, the fact that these media are often used in combination must be taken into account (especially in search behaviour), but this shouldn't detract from the fact that these media already hold a solid place alongside the ubiquitous job portals of the job market landscape, and that they will almost certainly strengthen this position in the near future.

Facebook achieves the highest market share in search behaviour in Hungary (43%), whereas the lowest is in Japan (5%) and Russia (7%). Overall, Facebook is the number three in social media, but at a country level, there are some exceptions. It is only in Hungary that Google has to let Facebook take the lead. The difference with LinkedIn is less pronounced. Facebook can respectably compete with LinkedIn in a reasonable number of countries (Belgium, New Zealand, Germany, etc.). In a number of countries, Facebook even precedes LinkedIn (Russia, Poland, Romania, Ukraine, Greece and Hungary, quoted previously). The most striking result can be found in China. Facebook fetches 10% (despite a ban), which is about the same as 11% for LinkedIn, which is permitted.

Like all social media, Facebook is clearly less used by the 55+ group (13%) and the highly qualified (13%). In that segment, LinkedIn, is as expected, clearly stronger (31%)

Twitter gets modest results overall, not above 10% anywhere, except for in India. In China, the social medium does not score because it is banned just like Facebook. For the 55+ group, it is practically absent (2%). The share is also not substantially higher for the highly qualified (6%).

the proportion of global workforce that uses this channel when searching for work (multiple channels are possible)



unweighted average of 32 countries
N = 40,933

overall, it's only the development of the job portals that is really relevant.

how has the importance of search channels evolved over time?

the belgian case

Of course, with this research, we cannot show the importance of how search channels have evolved over time. To gain some insight, we can use the Labour Force Survey (European Union), where the demand for search behaviour has been established for many years. We do not have a known analysis for the European Union as a whole to map the evolution of search channels. For Belgium, an interesting analysis is available (Hendrickx, 2018). According to the Labour Force Survey (LFS), the share of PES as a search channel has been declining since 2004 for the employed, and remains, as expected, stable at a very high level for the unemployed. The share of the PRES (both for recruitment and staffing) among the employed rose until 2005 but has remained stable since then at a slightly lower level than the PES. The proportion of staffing companies among job seekers has risen continuously since 1999. This is at least in part as a consequence of the increased activity of job seekers. In that period, the share almost doubled. But, it still remains below that of the PES.

Job portals have seen an uninterrupted increase since 1999 with both the employed and the unemployed and have been the most widely used search channel for the employed since 2002. For the unemployed, it is the second search channel after the PES. The problem is that, in the Belgian LFS, printed and digital job sites are counted together, and therefore the movement from print to digital cannot be detected.

Personal connections are slightly dropping for the employed since the financial crisis but remain clearly the second most important search channel after the job sites. For job seekers, this channel gained importance until 2010 but has yet to gain back some ground since then.

Overall, it's only the development of the job portals that is really relevant. The clear increase in this channel has only been at the expense of PES and personal connections to a limited extent, and not at all for the PRES. That means that the emergence of the job portals resulted mainly in an increase in channels and hence led the search behaviour.

We can also conclude that the disintermediation theory, which is spoken about in the introduction, is not confirmed, at least not for Belgium. The rise of job portals has not led to a weakening of the PES and PRES. Therefore, we cannot speak of disintermediation. On the contrary, in fact, we can also view the job portals and social media as an intermediary. From this perspective, there is even further intermediation in the labour market.

05

how do people find (new) work?

the average number of find channels is higher than in previous studies. This also coincides with the arrival of digital channels that often have a very low entry threshold and are often combined with other channels.

Looking for work is one thing, finding work is something else. Traditionally, we have found that the ranking of the diverse channels for searching for work on the job market, varies somewhat from that of the channels for finding work.

As always, the number of channels used for finding work is lower than the number for searching for work. Each respondent reports an average of 3.3 search channels and 2 find channels.[8] The average number of find channels is higher than in previous studies. This also coincides with the arrival of digital channels that often have a very low entry threshold and are often combined with other channels.

job portals

Job portals are not just the most utilised search channel but also, without a doubt, the most utilised find channel worldwide. No less than 38% of all respondents who have found (other) work have done this (partly) using a job portal. Here too the differences between countries are gigantic. In Ukraine the job portals reach up to 67%. Malaysia and Russia are two more countries where job portals reach over 50% (57% and 53%). Countries with lower percentages are the Netherlands (15%), Hungary (16%), Greece (17%), Belgium (18%), Sweden (18%) and France (23%). Belgium, Sweden and France are also countries where the PES scores high, thanks partly to digital services. It is likely that this has slowed down the rise of job portals.

Women appear to find work through job portals more than men (42% versus 35%). Whereas there appears to be no difference in search behaviour according to age (each age group searches through job portals with the same intensity) there is a clear difference with regard to finding a job (41% of under 25-year-olds versus 31% of 55+). Nevertheless, job portals remain the second most important channel for finding a job for the 55+ group (after personal connections). Lower qualified workers also appear to find work less through job portals (31% of lower qualified workers versus 40% for medium and higher qualified workers).

8 Both the average number of search channels and find channels are somewhat underestimated because, for this analysis, only the international channels were included. Local channels within each country were also researched but not included in this analysis.

personal connections/references

Personal connections/references are the only channel that remains somewhat in the same range as the job portals with 31%. Ukraine and Greece are the only countries where a majority finds a job using this channel (57% and 54%). Russia and Hungary achieve 47%. The Netherlands and Luxembourg achieve surprisingly high scores of 44%. The lowest scores are for the U.K. (16%) and Japan (17%).

For this channel there is little difference between men and women, as for many other channels. Historically, men found much more work than women by using this channel. With the feminisation of the employment market, this difference has gradually disappeared. Once again, age plays an important role. Younger people find work in 28% of cases through personal connections/references whereas for the 55+ group it's 44%. Also, for the 35-54 age group, personal connections/references are just as important as the job portals (33% versus 34%). It is interesting that there is also little difference between the different levels of qualification. Lower qualified workers reach 27%, medium and highly qualified 32%.

recruitment agencies

Far behind the job portals we find recruitment agencies with 20%. In Singapore, China and Hong Kong this channel scores 38%, 37% and 34%. In Romania it scores 34%. In Spain, Italy, Hungary, Russia, Greece and Ukraine it is under 10%. It is mostly the higher qualified workers who find work using this channel (27%).

company (web)site

The company (web)site is in fourth place with 19%. China is a high-flyer here with no less than 36%. In France, Poland, Japan, Russia and Ukraine this channel doesn't reach 10%. Once again, it's mostly the highly qualified workers who find work using this channel (24%).

staffing companies and google

Staffing companies and Google each make 17%. As mentioned earlier, the first channel must be looked at together with recruitment agencies because there is quite likely an overlap between these two. The highest market share is in China (28%) – a high score when we take into account that this country already scored high for recruitment agencies – Belgium (26%), France (23%) and Italy (21%). In various countries this channel has no share, probably because the activities were reported under recruitment agencies (e.g. Poland and Hong Kong). For this channel there were no substantial differences within the subgroups. Staffing companies and recruitment agencies together (PRES) achieve a higher market share than the PES almost everywhere. The difference is quite significant in some countries.

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the 55+ group hasn't really discovered the google channel yet (7%), contrary to the younger people (20%). This was also apparent in the search channels.

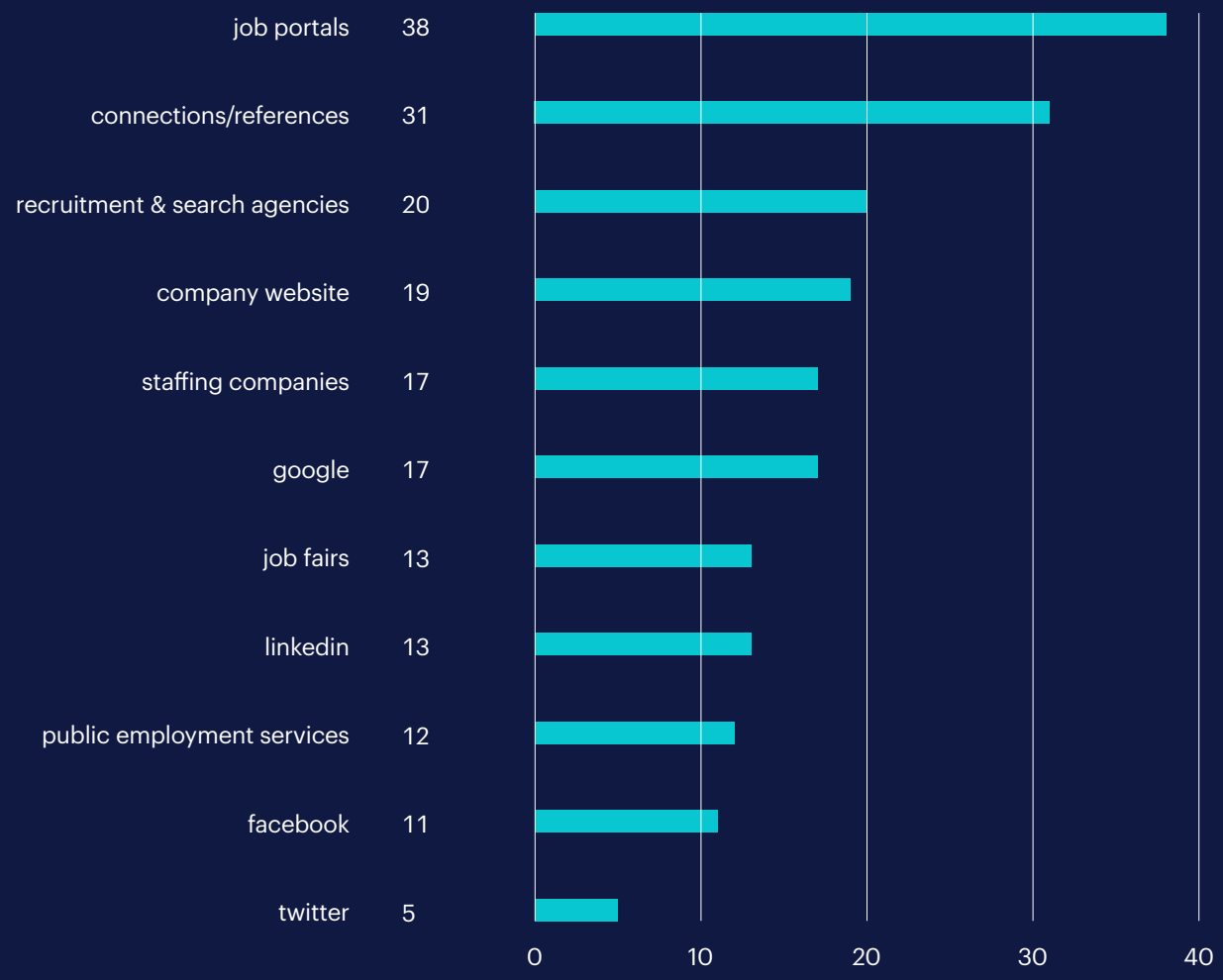
Google, as a private company, now reaches the same market share as staffing companies. If we don't take into account the very specific result from India (42%), the differences between countries are quite small. We note the same phenomenon with other social media sites. The vast majority are situated between 10% and 20%, which shows that these large companies are developing internationally. The Netherlands scores are very low, strangely enough (5%). Also, in Japan and Russia, Google doesn't reach 10%. Romania achieves the highest European score (30%). Men appear to find more work through Google than women (19% versus 14%). The 55+ group hasn't really discovered this channel yet (7%), contrary to the younger people (20%). This was also apparent in the search channels.

job fairs and linkedin

Job fairs and LinkedIn achieve 13%. China is the highflyer at job fairs reaching no less than 38%. India also scores high with 20%. In the Netherlands this channel is virtually inexistent (1%). The channel is particularly successful with the highly qualified people (20%).

LinkedIn (13%) must allow Google to take the lead as the most used social medium. Once again India is at the top with 39%. Otherwise, the differences between countries are not so large, meaning that its worldwide growth is happening quite evenly, a phenomenon that we observe for all social media. The lowest scores are for Japan (3%) – a country that scores far below average for all international social media – and a number of Eastern European countries such as Czechia and Russia (2%), Hungary and Ukraine (3%). In some countries LinkedIn has to contend with local competition which also has an impact (e.g. Germany 6%). Just like Google, men find more work via LinkedIn (15% versus 11%). As can be expected, this is also the case for more highly qualified people (16%). However, Google is also ahead in this group (17%). LinkedIn also scores lower with the 55+ age group but the difference is smaller here than with other social media (9% versus 14% for younger categories).

proportion of global workforce who found work through the specified channel (several channels are possible)



unweighted average of 32 countries
N = 21,100

PES

The PES achieves disappointing results overall, with barely 12%. Sweden (32%), France (29%), Belgium (28%), Norway and Japan (24%) and Austria (22%) achieve the highest scores in this category. The higher score probably goes together with a solid digitalisation strategy and also, in some cases, close collaboration with the PRES. We find the lowest scores in the Netherlands (2%), USA (5%), Switzerland and Romania (7%). Even less positive news for PES is that young people reach an even lower score (8%).

in some countries the PES achieves a better than average result. The higher score probably goes together with a solid digitalisation strategy and also, in some cases, close collaboration with the PRES.

facebook

Facebook is the third social medium after Google and LinkedIn with 11%. Once again India achieves the highest score (27%). Hungary also scores high (21%). In China the company is forbidden which explains the 0 score. Also, the Netherlands (6%) and Russia (3%) achieve low scores. Facebook is the only social medium where there is no difference between men and women. The 55+ group scores surprisingly low with barely 3%, a phenomenon which we observe for all social media.

twitter

Twitter concludes the list with 5%, making it the only channel that manages to reach the same score as the search channels, which shows high efficiency. Once again men use it more than women (7% versus 4%). The same is true for highly qualified people (7%). This channel is totally missing for the 55+ group.

For social media, there is definitely a gender as well as an age effect. With the exception of Facebook, men find more work through social media than women and the 55+ group finds work through this channel in fewer cases than their younger colleagues. The difference is the lowest for LinkedIn.

06

the efficiency of the different search channels

personal connections and references are (after twitter) the most efficient channel globally. This is not surprising and has been confirmed by studies for many decades.

As a conclusion, we are calculating the efficiency by channel. To do this, we are comparing the search proportion with the find proportion. It goes without saying that this is a very rough measure and that not too many conclusions can be extracted from this.

Personal connections and references are globally (after Twitter) the most efficient channel. This is not surprising and has been confirmed by studies for many decades.[9]

Earlier in this report, we established that personal connections stand the test of digitalisation very well. They are still very much in use for finding a job and the efficiency doesn't appear to be decreasing under the influence of digitalisation. Staffing companies seem to be more efficient than public employment channels. This was also established in a previous study (Denolf, 1999). Job portals achieve a relatively high score. The difference with social media sites, Google and LinkedIn, reaches over 10 percentage points.

The divergent scores for social media are also notable, with the previously mentioned exceptional score for Twitter. Facebook comes in second quite a way behind, then Google and LinkedIn follow at an even greater distance.

table 1

global efficiency of search and find channels on the employment market

proportion 'find channel' divided by proportion 'search channel'

twitter	100.0
personal connections	88.6
staffing companies	65.4
job portals	64.4
facebook	61.1
PES	57.1
recruitment search companies	57.1
job fairs	56.5
google	48.6
company sites	47.5
linkedin	44.8

9 Blau, D. M. and others, (1990) established in a study in 1990 that the use of personal contacts is twice as effective as other channels.

07

summary and conclusions

- In 2018, 26% of respondents worldwide changed jobs. In 19% of cases this was an external move and in the other cases it was internal (7%).

- The intention to change jobs in the coming year is naturally higher. Up to 28% are thinking of changing externally, 11% internally.

- Globally speaking, from this study it doesn't appear that increased internal mobility would slow down external mobility. Countries with an average high external mobility generally do not combine this with a lower average internal mobility or vice versa. For example, Japan has an extremely low external mobility combined with a somewhat lower than average internal mobility. We observe the same in Belgium, Germany, the Netherlands, Italy, and Spain. In countries such as India, Sweden and Brazil we again see a combination of high external and internal mobility. This suggests that internal and external mobility in many cases do not compensate for each other (although widely accepted in HR circles) but often strengthen each other in some way.

- As expected, the intentions regarding mobility strongly depends on the actual behaviour. Where there is higher actual mobility, the intentions are also higher.

- Currently there are no direct indications that the arrival of internet search and find channels on the job market and the digitalisation of existing channels has led to an increase in external mobility. An important feature of the internet channels is that they have strongly decreased the costs of searching. In theory this should be a stimulus for external and even internal mobility. Since the internet channels are clearly on the rise, we would expect that mobility (regardless of the economic climate) would also increase. Until now however, there have been no signs of this. In Belgium for example, the level of search over the past few years has been lower than the level at the end of the previous century. This has probably to do with the ageing of the workforce.

the most popular search channel by far, worldwide, is the job portal. 59% indicated that they have found work through this channel.

- The most popular search channel by far, worldwide, is the job portal. No less than 59% indicated that they have found work through this channel. Women appear to search for work through this channel significantly more than men (respectively 64% and 54%). We see no difference according to age. The 55+ group also use this channel intensively.

- Far behind the job portals we find personal connections and company sites with 41 and 40%. Lower qualified workers make less than average use of these connections (34%), 55+ above average (54%). Company sites are used much more by the highly qualified workers than by the lower qualified workers (46% versus 26%).

- Recruitment & search companies and Google take the fourth place with 35%. Recruitment & search companies are used mostly by the highly qualified group (47%). For Google there is a strong age impact, 46% of the younger generation use it, for the 55+ group this decreases to 19%.

- LinkedIn, with 29%, has to concede the position of most used search channel to Google. However, contrary to Google, there is no age impact for LinkedIn. The 55 + group use it just as intensively. Qualifications, on the other hand, do come into play. Both lower and medium qualified workers use Google more than LinkedIn and even in the higher qualified group, LinkedIn only makes a small difference (31% versus 28%).

- Staffing companies worldwide take a share of 26% of the search channels. These numbers should be considered together with those of recruitment agencies. Both recruitment agencies and staffing companies achieve a higher share than the PES.

- Job fairs seem to be an important channel worldwide with almost a quarter of all respondents who indicate it as a search channel. It seems to be mostly highly qualified people who use this channel (30%). The 55+ group show a much lower share (16%).

- The PES only makes ninth place with a market share of 21%. It is worrying that the under 25s are even lower with 15%. In almost all countries researched, the PRES (recruitment and staffing) is a little higher than the PES. If we include job portals and social media we can only conclude that the PES plays a minor role, internationally speaking, in the allocation of the employment market. Countries where this isn't the case (Belgium, France, Sweden, Norway, etc.) are countries where digitalisation has been well implemented and where there is good collaboration with the PRES.

- Facebook and Twitter bring up the rear with 18% and 5%. In both cases the 55+ group is a little lower (13% and 2%). Facebook is also slightly less used by the highly qualified group (13%).

- Job portals aren't just the most popular search channel, but it is also through this channel that by far the most jobs are found (38%). This preponderance is true for all subcategories: man/woman, age and qualifications. The lower qualified and 55+ groups find work a little less through this channel but for them too, job portals are the most popular way to find work in 2019.

- Personal connections/referrals are the second most popular find channel with 31%. In the past, women found less work through this channel than men but that difference has disappeared in the meantime, probably due to the feminisation of the work market. The 55+ group find relatively more work through this channel while the lower qualified find less.

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next to the job portals, social media also play an important role in the allocation process on the job market.

- Next to the job portals, social media also play an important role in the allocation process on the job market. Google achieves the highest score (17%), followed by LinkedIn (13%), Facebook (11%) and Twitter (5%). Together they reach a market share of 46%. Even if we take some overlapping into account, this is still a large share. We observe an age, gender and qualification effect for all the social media retained. Without exception, men always find more work than women using these media. Age also plays a clear role (with the exception of LinkedIn). The 55+ group finds less work than the younger categories using these channels. Only at LinkedIn is the difference limited. This has partly to do with the search behaviour.

- With an average market share of only 12%, the PES in many countries doesn't play a leading role in finding work. The market share of the PRES (recruitment (20%) and staffing (17%) is substantially higher in all the countries researched. The countries where the PES achieves a much better than average result (Belgium, France, Sweden, Norway, Austria and Japan) are those where digitalisation and structured collaboration with the PRES have been heavily implemented.

- From the information gathered in this research, we certainly can't conclude that there is disintermediation on the labour market. The impact of the PES and PRES (together 49%) remains quite high, although we cannot rule out the possibility that this has decreased over time. Besides, there are also many reasons for considering the new digital channels and social media as a sort of intermediary. If we take these into account, we can even speak of further intermediation of the market, a process that will surely continue to develop in the future.

- On the basis of a comparison between the search and find percentages, personal connections appear (after Twitter) worldwide as the most efficient search channel by far. This superior efficiency was established a long time ago in scientific studies. It looks as if job portals and social media have not made any difference here.

- From this study, it also appeared that the situation of search and find channels can vary greatly by country. The national proportions can vary greatly. There are countries where the PES does play a prominent role. In other countries the PRES are less present because they are strongly limited by the law. In other countries again, some social media sites play no role at all because they are forbidden. Then there are some local social media sites that in some cases can have a large presence (China, Germany, Australia, etc.). Therefore, the global results cannot be extended to national results.

appendix

search channels and find channels by country

table 2

search channels by country

	global	belgium	france	nether-lands	germany	poland	spain	UK	italy	australia	new zealand
unweighted base	40,933	1,974	1,712	2,481	1,017	2,342	2,098	1,499	1,418	2,185	851
recruiters (agencies/headhunters)	35%	33%	27%	26%	23%	25%	16%	44%	8%	41%	38%
staffing agencies	26%	-	32%	-	18%	-	38%	27%	50%	19%	20%
public employment services	21%	54%	53%	10%	18%	30%	36%	20%	21%	23%	22%
job portals (zonajobs, bumeran, trabajando.com, empleos clarín, indeed.com.ar, jobisjob.com.ar, trovit, jobsmart.com.ar)	59%	39%	46%	58%	49%	65%	73%	56%	48%	67%	74%
job fairs	23%	15%	16%	9%	12%	15%	9%	16%	8%	10%	6%
personal connections/referrals	41%	35%	39%	57%	42%	52%	48%	25%	40%	32%	44%
company career site	40%	34%	20%	50%	40%	28%	41%	30%	42%	30%	36%
google	35%	36%	30%	30%	40%	40%	35%	37%	34%	37%	34%
linkedin	29%	24%	29%	49%	14%	18%	42%	27%	36%	30%	29%
facebook	18%	23%	18%	16%	18%	27%	19%	24%	22%	24%	28%
twitter	5%	5%	6%	2%	6%	4%	7%	9%	5%	7%	4%

	india	japan	singa-pore	canada	USA	argen-tina	hong-kong	china	switser-land	hungary	sweden
unweighted base	870	675	573	1,011	1,378	890	851	656	1,014	1,557	1,339
recruiters (agencies/headhunters)	41%	30%	55%	30%	25%	23%	49%	62%	34%	18%	31%
staffing agencies	23%	22%	25%	23%	22%	27%	-	44%	24%	21%	32%
public employment services	21%	37%	31%	35%	9%	27%	23%	16%	21%	23%	52%
job portals (zonajobs, bumeran, trabajando.com, empleos clarín, indeed.com.ar, jobisjob.com.ar, trovit, jobsmart.com.ar)	49%	54%	67%	58%	65%	63%	56%	60%	70%	46%	39%
job fairs	27%	11%	23%	23%	20%	14%	16%	49%	7%	18%	10%
personal connections/referrals	41%	17%	35%	38%	40%	40%	26%	47%	47%	60%	47%
company career site	37%	25%	33%	38%	37%	49%	30%	57%	42%	39%	24%
google	54%	13%	27%	44%	47%	37%	25%	10%	37%	39%	30%
linkedin	59%	3%	34%	38%	34%	41%	25%	15%	26%	10%	30%
facebook	33%	5%	14%	23%	22%	33%	20%	-	15%	43%	23%
twitter	18%	6%	4%	8%	6%	7%	-	-	4%	1%	6%

search channels by country
(continued)

	russia	portugal	malaysia	luxem-bourg	brazil	greece	czech republic	austria	norway	rumania	ukraine
unweighted base	3,290	1,122	577	138	912	863	940	754	678	1,004	2,264
recruiters (agencies/headhunters)	16%	32%	44%	16%	32%	19%	28%	25%	28%	50%	13%
staffing agencies	-	14%	-	11%	18%	11%	-	17%	29%	29%	-
public employment services	25%	40%	32%	29%	28%	37%	37%	51%	49%	18%	21%
job portals (zonajobs, bumeran, trabajando.com, empleos clarín, indeed.com.ar, jobisjob.com.ar, trovit, jobsmart.com.ar)	71%	77%	73%	63%	55%	43%	64%	59%	68%	-	79%
job fairs	21%	10%	31%	9%	10%	13%	10%	9%	10%	34%	13%
personal connections/referrals	57%	51%	34%	57%	47%	71%	53%	55%	47%	55%	64%
company career site	21%	34%	46%	35%	34%	56%	50%	53%	43%	46%	28%
google	23%	40%	39%	30%	45%	47%	39%	38%	26%	47%	34%
linkedin	5%	47%	35%	29%	40%	29%	14%	15%	24%	26%	10%
facebook	7%	30%	34%	27%	31%	33%	32%	18%	24%	26%	24%
twitter	3%	2%	-	1%	4%	3%	3%	2%	4%	3%	2%

table 3

find channels by country

	global	belgium	france	nether-lands	germany	poland	spain	UK	italy	australia	new zealand
unweighted base	21,100	1,060	942	1,309	572	1,200	952	848	608	1,265	473
recruiters (agencies/headhunters)	20%	16%	16%	14%	13%	14%	8%	22%	4%	28%	24%
staffing agencies	17%	-	23%	-	12%	-	21%	17%	21%	12%	11%
public employment services	12%	28%	29%	2%	10%	11%	12%	10%	8%	10%	11%
job portals (zonajobs, bumeran, trabajando.com, empleos clarín, indeed.com.ar, jobisjob.com.ar, trovit, jobsmart.com.ar)	38%	15%	23%	18%	26%	38%	42%	33%	13%	44%	47%
job fairs	13%	6%	7%	1%	7%	5%	5%	10%	3%	8%	4%
personal connections/referrals	31%	26%	30%	44%	32%	37%	37%	16%	38%	25%	34%
company career site	19%	12%	8%	17%	14%	9%	14%	15%	13%	13%	14%
google	17%	17%	14%	5%	18%	10%	13%	18%	12%	16%	12%
linkedin	13%	9%	11%	11%	8%	6%	13%	13%	13%	13%	8%
facebook	11%	13%	9%	6%	12%	12%	9%	17%	12%	15%	14%
twitter	5%	7%	5%	1%	7%	4%	5%	8%	5%	7%	2%

find channels by country
(continued)

	india	japan	singa-pore	canada	USA	argen-tina	hong-kong	china	switser-land	hungary	sweden
unweighted base	485	370	252	551	766	395	529	277	564	778	739
recruiters (agen-cies/headhunters)	28%	17%	38%	16%	14%	10%	34%	37%	19%	7%	26%
staffing agencies	16%	19%	16%	16%	15%	16%	-	28%	12%	9%	21%
public employment services	14%	24%	17%	12%	5%	10%	16%	13%	7%	9%	32%
job portals (zonajobs, bumeran, trabajando.com, empleos clarín, indeed.com.ar, jobisjob.com.ar, trovit, jobsmart.com.ar)	35%	41%	46%	38%	43%	37%	44%	48%	35%	16%	18%
job fairs	20%	4%	16%	12%	10%	8%	14%	38%	5%	4%	7%
personal connec-tions/referrals	28%	17%	22%	28%	29%	30%	21%	38%	30%	47%	37%
company career site	22%	9%	14%	16%	16%	14%	18%	36%	14%	10%	13%
google	42%	7%	11%	20%	19%	11%	16%	12%	16%	13%	14%
linkedin	39%	3%	14%	14%	15%	13%	14%	10%	8%	3%	12%
facebook	27%	3%	13%	12%	14%	18%	18%	-	9%	21%	15%
twitter	16%	3%	6%	6%	7%	5%	-	-	6%	1%	7%

	russia	portugal	malaysia	luxem-bourg	brazil	greece	czech republic	austria	norway	rumania	ukraine
unweighted base	1,604	544	266	59	396	423	527	432	358	443	1,113
recruiters (agen-cies/headhunters)	8%	15%	26%	19%	15%	8%	14%	11%	17%	34%	8%
staffing agencies	-	6%	-	6%	8%	6%	-	6%	15%	16%	-
public employment services	14%	14%	24%	19%	12%	14%	14%	22%	24%	7%	12%
job portals (zonajobs, bumeran, trabajando.com, empleos clarín, indeed.com.ar, jobisjob.com.ar, trovit, jobsmart.com.ar)	53%	44%	57%	19%	24%	17%	35%	26%	32%	-	67%
job fairs	7%	2%	15%	2%	4%	4%	3%	3%	6%	13%	4%
personal connec-tions/referrals	47%	40%	27%	44%	31%	54%	38%	38%	36%	39%	59%
company career site	8%	10%	23%	18%	26%	14%	16%	18%	16%	24%	9%
google	9%	12%	17%	10%	15%	15%	11%	10%	10%	30%	13%
linkedin	2%	14%	16%	5%	11%	5%	2%	4%	8%	10%	3%
facebook	3%	11%	23%	7%	13%	13%	11%	7%	10%	18%	10%
twitter	2%	1%	-	-	4%	1%	2%	1%	4%	2%	1%

appendix

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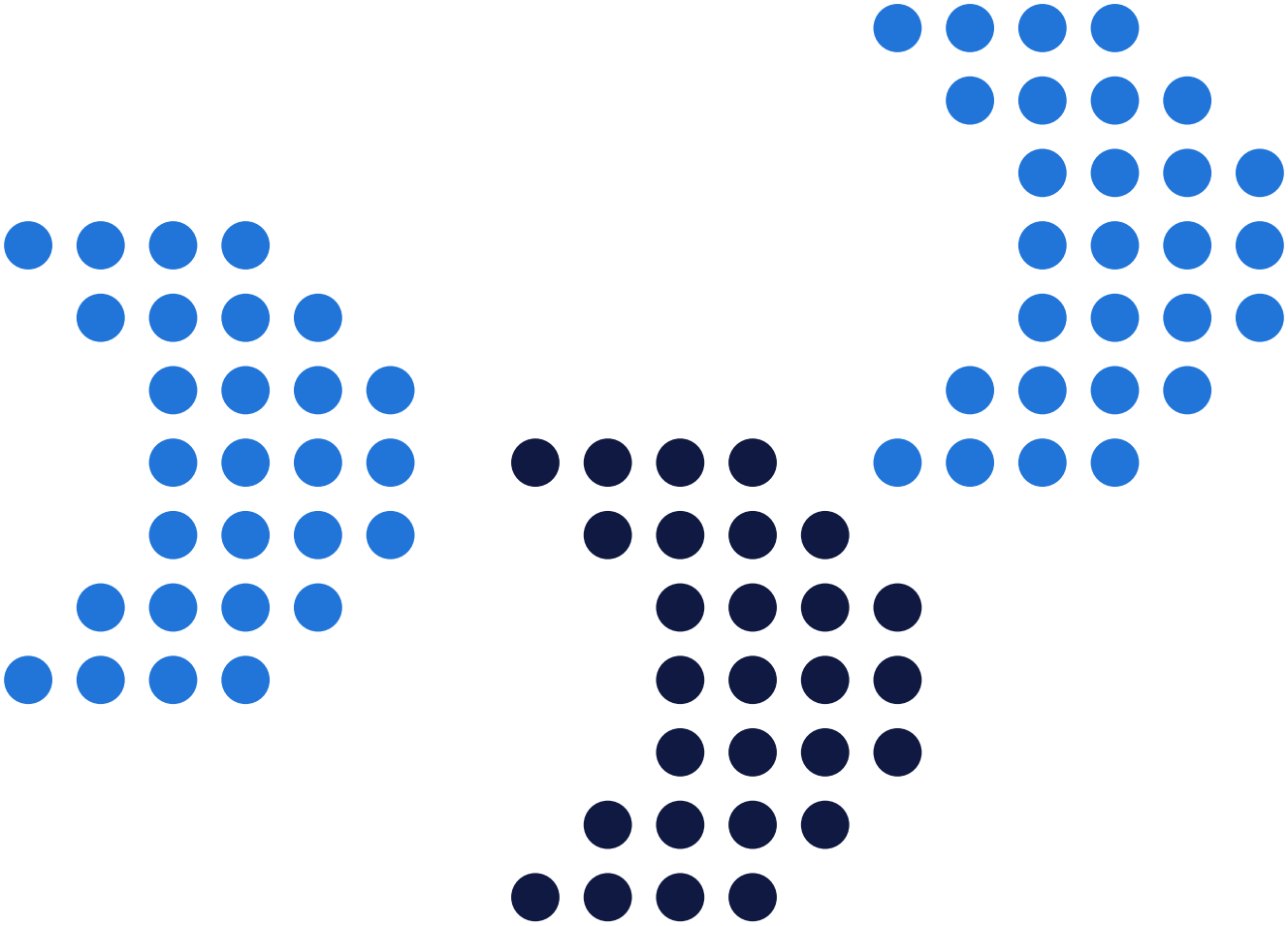

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