

Scottish Monthly Recruitment Market Update

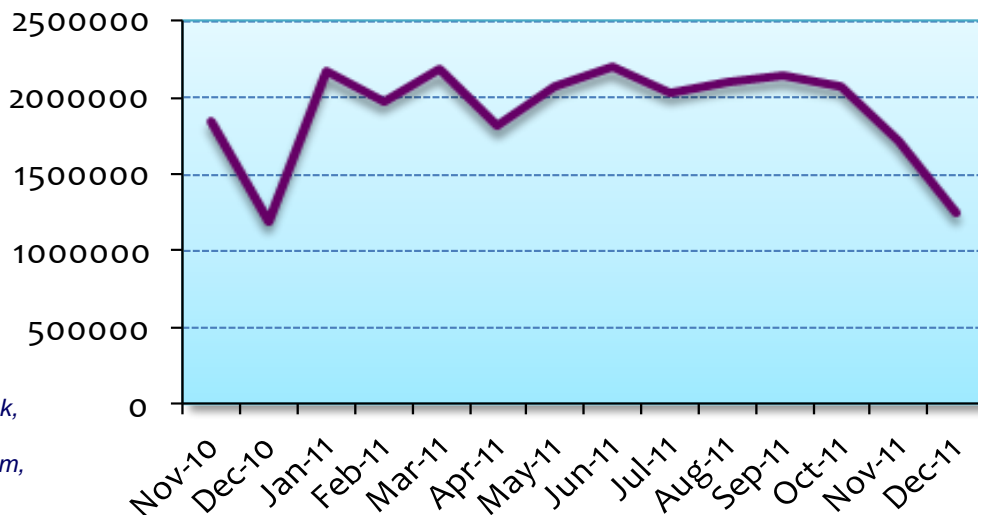
Welcome to the Scottish 'Recruitment Market Update' for December 2011, detailing total market statistics for the 9 largest commercial recruitment sites in Scotland, along with an update on s1jobs.com for the period.

As thoughts turned to Christmas and the season's festivities, the overall market showed the usual trends in terms of reduced user traffic. However, in line with recent months the year-on-year trends were still up for overall user sessions and the general consultancy market stayed active for longer in terms of the level of job postings. In addition, the Financial Services sector came alive in the last 5 weeks of 2011 with more vacancies posted than the preceding 4 or 5 months. For s1jobs, 2011 showed very strong growth in client vacancies and revenues, so there are continuing signs of optimism in the wider recruitment marketplace.

Market Update: s1jobs & Identified Comparative Competitors

Source: Hitwise - December 2011

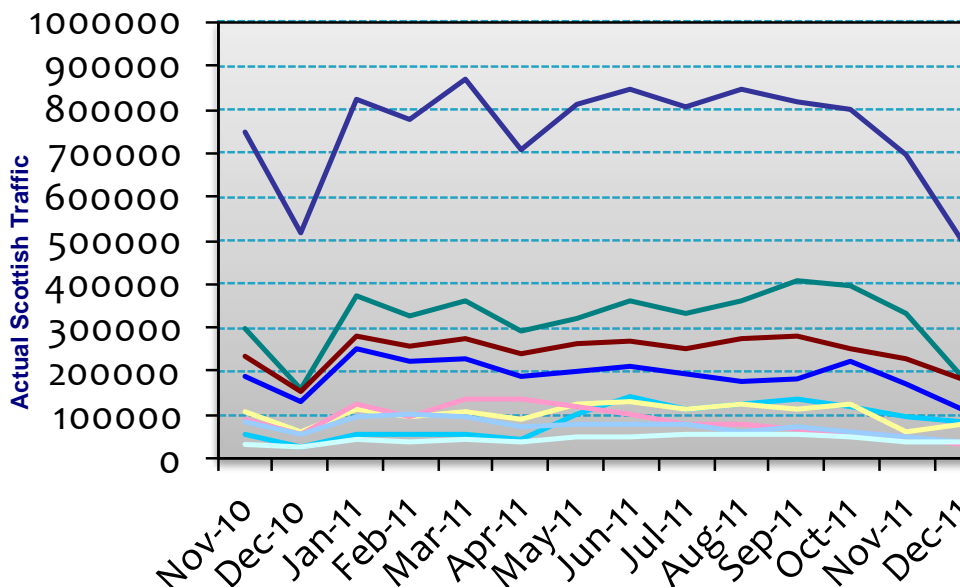
The total number of searches in December 2011 shows the typical seasonal decline with 1,245,202 individual user sessions across the 9 largest commercial recruitment sites in Scotland (as below). However, that's up 53,809 searches on December 2010.



9 largest commercial recruitment sites in Scotland: s1jobs.com, totaljobs.com, reed.co.uk, jobsite.co.uk, monster.co.uk, scotcareers.co.uk, jobs.stv.tv, jobs.scotman.com, jobs.guardian.co.uk

Scottish Traffic: s1jobs & Identified Comparative Competitors

Source: Hitwise - December 2011



Independent 'Hitwise' statistics show s1jobs attracted a total of 592,677 individual user sessions for December 2011 - 83.9% of those sessions from within Scotland.

- www.s1jobs.com
- www.totaljobs.com
- www.reed.co.uk
- www.jobsite.co.uk
- www.monster.co.uk
- www.scotcareers.co.uk
- www.jobs.stv.tv
- Scotsman Jobs
- jobs.guardian.co.uk

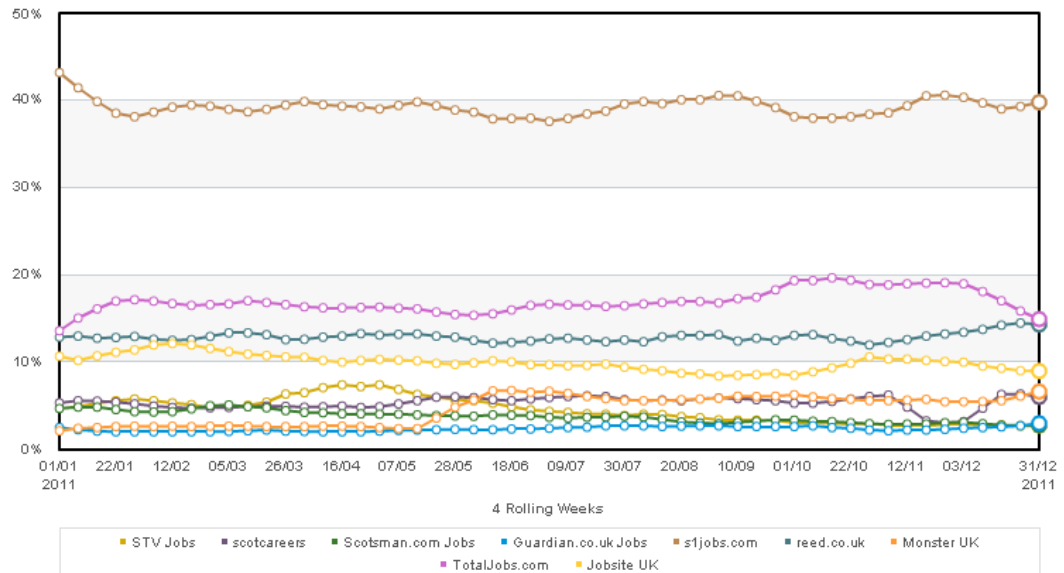
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Market share: s1jobs & Identified Comparative Competitors

Source: Hitwise - December 2011

s1jobs' share of total audience traffic (user sessions), within the 9 largest commercial recruitment sites in Scotland was 39.81% in December 2011.

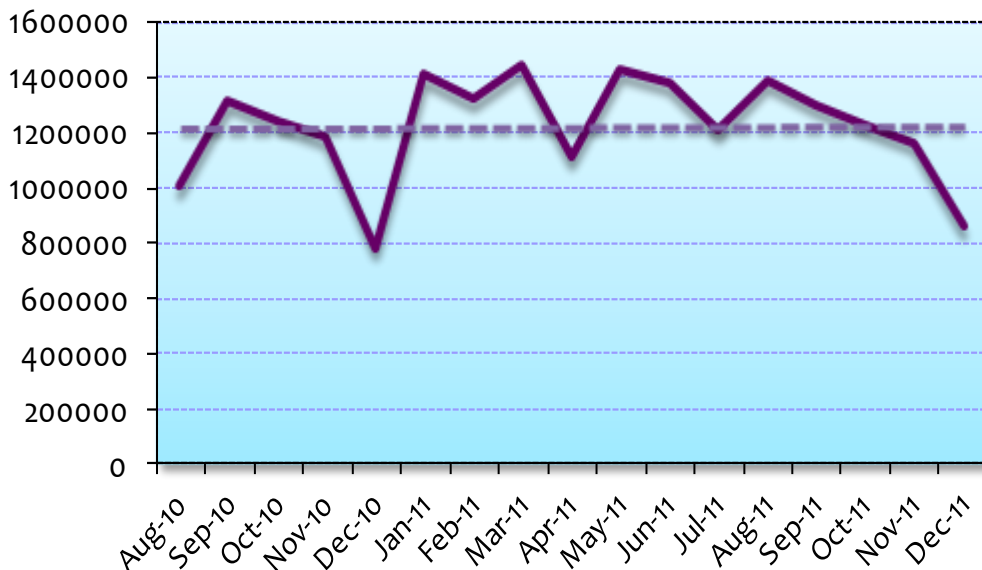
Although s1jobs ran no TV advertising throughout 2011, it continued to enjoy a share of 40% across the year - and, still generates more Scottish user sessions than the next 3 largest job sites combined.



s1jobs: Job Searches by Sector

Source: Internal

s1jobs generated a total of 858,953 individual job searches in December 2011. That's an increase of 9.4%, or 74,089 searches versus December 2010.



Some sectors have increased the number of searches from December last year:

Social Services - up 29% from December 2010 to 28,789 searches in December 2011.

Legal - up 16% from December 2010 to 8,132 searches in December 2011.

Customer Services - up 4% from December 2010 to 15,632 searches in December 2011.

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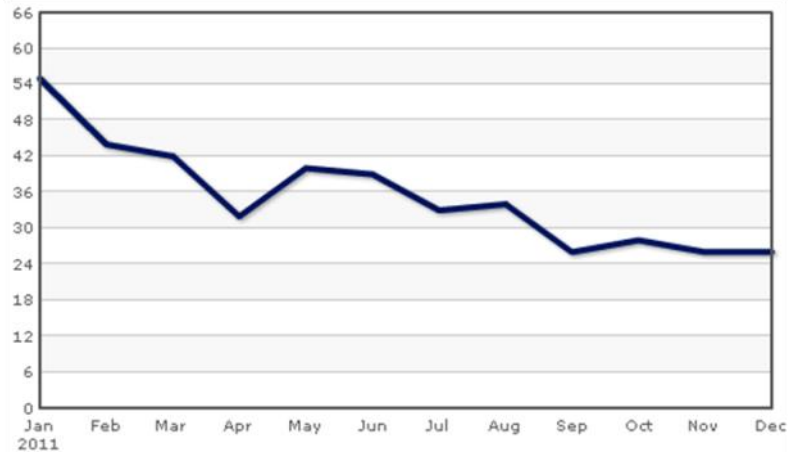
s1jobs: Applications per Vacancy

Source: Internal

An average of 26 applications were received per 'direct employer' vacancy posted in December 2011.

The **Hospitality, Catering and Tourism** sector has seen a massive spike in the number of applications per vacancy in comparison to December 2010 - increasing by 200% to 21 apps per vacancy in December 2011.

The **Customer Service** sector has also seen an increase with an average of 43 applications per vacancy in December 2011 - up by 39% on the same month in 2010.



s1jobs: Key Statistics

Source: Internal

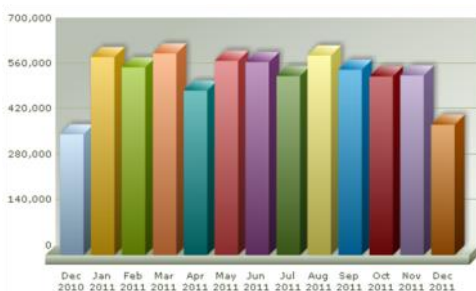
Number of jobs posted

A total of **14,245** jobs were posted on s1jobs in December 2011. With an increase of **28%** 'direct employer' vacancies from December 2010.

Industry sectors such as **Financial Services & Construction** have been strong in comparison to December last year with an average increase of **52.5%** of 'direct employer' vacancies posted in both sectors.

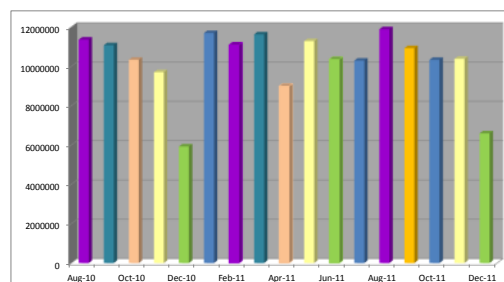
The number of vacancies posted for the **Retail** sector has declined slightly with 25% less 'direct Employer' vacancies posted this December in comparison to December 2010.

Unique users



The number of unique users to s1jobs in December was **401,308**. Up by 29,787 unique users from December 2010.

Page views



s1jobs users generated a total of **6,597,121** page views in December. An increase of over 670,000 from December 2010.

Email alerts



In December s1jobs sent **2.4 million** individual email alerts to registered job seekers. And a total of **209,839** candidates had registered their CV on s1jobs.