

THE EMERGING JOB MARKET ON THE INTERNET

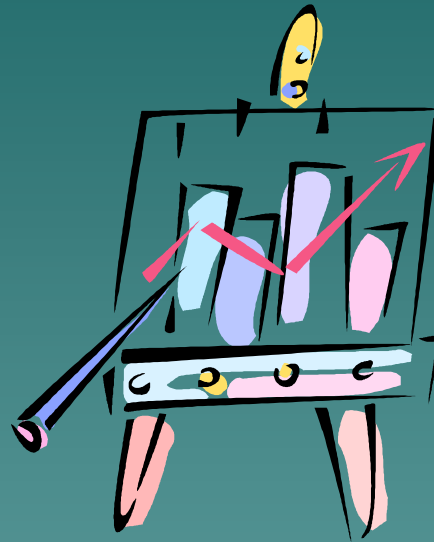
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A RAPIDLY EVOLVING INNOVATION

EXPLOSIVE
GROWTH



NEW
INSTITUTIONS

THE EMPLOYERS' PERSPECTIVE

- ◆ CONSERVATIVE INITIAL USE
- ◆ REDUCED TIME TO FILL VACANCIES
- ◆ LOWER COST PER VACANCY FILLED
- ◆ EXPANDED POOL OF APPLICANTS
- ◆ INCREASINGLY BROAD RANGE OF OCCUPATIONS

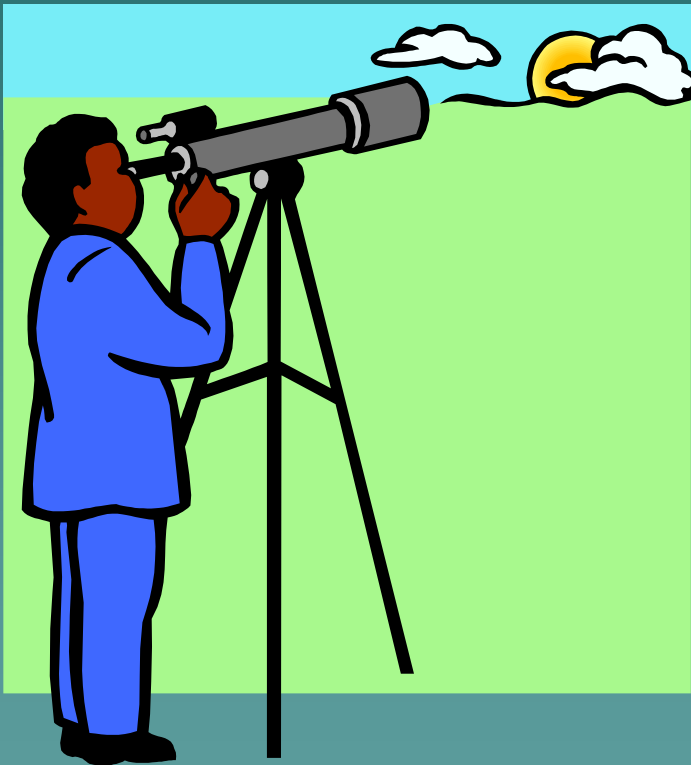


THE JOB SEEKERS' PERSPECTIVE



- ◆ LOW COST
- ◆ SUPPLEMENTS CONVENTIONAL SEARCH METHODS
- ◆ SOME SUBSTANTIAL DIGITAL DIVIDES
- ◆ PAIRED RESUME TESTS, EQUAL RESPONSES AT INITIAL CONTACT
- ◆ SEARCH BY *EMPLOYED* -- REDUCED LOYALTY? MARKET PRESSURE?

THE FUTURE



- ◆ **ADDITIONAL GROWTH IN US MARKET. OTHER MARKETS = ?**
- ◆ **DISPLACE CONVENTIONAL JOB SEARCH METHODS?**
- ◆ **ON-LINE STAGES BEYOND INITIAL CONTACT?**
- ◆ **CONTINUED CONSOLIDATION OF SUPPLIERS?**