

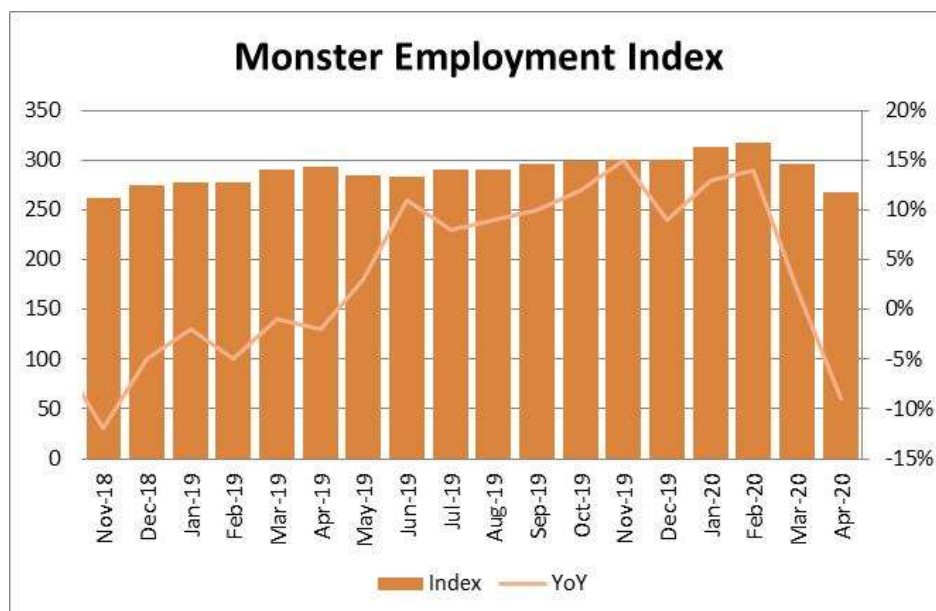
monster[®] EMPLOYMENT INDEX

Monster Employment Index India

April 2020 Index Highlights:

- Monster Employment Index India witnesses annual decline of nine percent in April 2020.
- Month-on-month growth also eased by 10 percent.
- Media & Entertainment leads among the monitored industry sectors, year-on-year.
- Production and Manufacturing records the steepest decline from the year-ago level.
- Among job-roles, only Engineering /Production professionals witness growth in annual online demand.
- Kolkata charts the steepest growth among monitored cities; whereas, Delhi-NCR declines the most.

The Monster Employment Index India is a monthly gauge of online job posting activity based on a real-time review of millions of employer job opportunities culled from a large representative selection of career Web sites and online job listings across India. The Index does not reflect the trend of any one advertiser or source but is an aggregate measure of the change in job listings across the industry.



Monster Employment Index India results for the past 18 months are as follows:

Nov 18	Dec 18	Jan 19	Feb 19	Mar 19	Apr 19	May 19	Jun 19	Jul 19	Aug 19	Sep 19	Oct 19	Nov 19	Dec 19	Jan 20	Feb 20	Mar 20	Apr 20	Y-O-Y
262	275	277	278	290	293	285	283	290	290	296	299	301	301	313	318	296	267	-9%

Industry Year-over-year Trends: Online hiring demand exceeded the year-ago level in four of the 27 industry sectors monitored by the Index.

- Year-on-year, **Media & Entertainment** (up 19 percent) led online hiring activity among industries for the second consecutive month. However, pace of growth eased by 12 percentage points; compared to 31 percent annual growth in March 2020. On six-month basis, the sector registered hike of six percent.
- **Advertising, Market Research, Public Relations** (up 11 percent) continued to record double-digit growth, on-the-year; also ranked among top growth industries. In the short-run, the sector saw receded growth on all parameters; down 10 percent (month-on-month), down nine percent (three-month) and down one percent (six-month).
- Many of the sectors registered year-on-year decline in online hiring due to the recent COVID-19 pandemic. **Retail** (down seven percent), **Real Estate** (down 16 percent), **FMCG/ Food & Packaged Food** (down 22 percent) and **Travel & Tourism** (down 26 percent) among others reported negative annual growth.
- **Production and Manufacturing** (down 42 percent) indicated the most-notable annual decline among industry sectors in April 2020.

Top Growth Industries

Year-over-year Growth	Apr 19	Apr 20	% Growth Y-o-Y
Media & Entertainment	382	456	19%
Advertising, Market Research, Public Relations (PR)	158	176	11%
IT - Hardware, Software	542	585	8%
NGO/Social Services	217	226	4%
Telecom/ISP	262	257	-2%

Lowest Growth Industries

Year-over-year Growth	Apr 19	Apr 20	% Growth Y-o-Y
Travel and Tourism	353	262	-26%
Automotive/ Ancillaries / Tyres	183	124	-32%
Import / Export	105	71	-32%
BPO/ITES	228	150	-34%
Production and Manufacturing	267	155	-42%

E-Commerce: E-commerce saw annual decline of 18 percent in April 2020. On-the-month as well, the sector recorded negative growth of two percent.

Nov 18	Dec 18	Jan 19	Feb 19	Mar 19	Apr 19	May 19	Jun 19	Jul 19	Aug 19	Sep 19	Oct 19	Nov 19	Dec 19	Jan 20	Feb 20	Mar 20	Apr 20	Y-O-Y
121	123	130	132	132	135	125	120	122	121	121	112	115	113	114	115	113	111	-18%

Occupation Year-over-year Trends: Online demand for professionals witnessed growth in only one of the 13 occupation groups monitored by the Index on annual basis.

- **Engineering /Production** (up three percent) is the only job-role to witness positive year-on-year growth in April 2020. This was the least growth registered since May 2019. Monthly demand declined by four percent. Professionals at mid-senior (7-10 years) level charted marginal growth of one percent.
- Online demand for **Software, Hardware, Telecom** (down one percent) professionals declined for the first time since March 2019. Even in the short-run, demand plummeted; down five percent (month-on-month), down eight percent (three-month) and down one percent (six-month). Professionals at all experience levels exhibited receded annual growth.
- As businesses have slowed-down due to COVID-19, hiring activity has also eased among occupation groups. Some of the affected job-roles include- **Customer Service** (down 15 percent), **Finance & Accounts** (down 20 percent) and **HR & Admin** (down 23 percent) among others.
- **Hospitality & Travel** (down 31 percent) professionals recorded the steepest annual decline among occupation groups this month.

Top Growth Occupations

Year-over-year Growth	Apr 19	Apr 20	% Growth Y-o-Y
Engineering /Production	249	257	3%
Software, Hardware, Telecom	366	362	-1%
Marketing & Communications	248	233	-6%
Sales & Business Development	407	378	-7%
Customer Service	268	229	-15%

Lowest Growth Occupations

Year-over-year Growth	Apr 19	Apr 20	% Growth Y-o-Y
Legal	267	217	-19%
Finance & Accounts	270	215	-20%
Arts/Creative	222	176	-21%
HR & Admin	232	178	-23%
Hospitality & Travel	257	177	-31%

Year-over year Trends by Experience level: Occupations

Top Growth Occupations/Experience	0-3 YR	4-6 YR	7-10 YR	11-15 YR	>15 YR
Engineering /Production	-27%	-1%	1%	-4%	-5%
Software, Hardware, Telecom	-6%	-7%	-7%	-13%	-11%
Marketing & Communications	-11%	-13%	-17%	-34%	-39%
Sales & Business Development	2%	4%	5%	-15%	-27%
Customer Service	-4%	-12%	-11%	-26%	-5%

Geographic Year-over-year Trends: Three of the 13 monitored cities by the Index witnessed positive annual growth in online hiring.

- **Kolkata** (up 13 percent) charted the steepest growth in e-recruitment activity among others, on-the-year. This was followed by **Baroda** (up four percent) and **Ahmedabad** (up three percent).
- All the key cities witnessed decreased demand for talents; **Hyderabad** (down eight percent), **Bangalore** (down 10 percent), **Mumbai** (down 18 percent), **Chennai** (down 23 percent) and **Delhi-NCR** (down 25 percent).

Top Growth Cities

Year-over-year Growth	Apr 19	Apr 20	% Growth Y-o-Y
Kolkata	347	391	13%
Baroda	253	264	4%
Ahmedabad	346	357	3%
Hyderabad	274	252	-8%
Kochi	264	240	-9%

Lowest Growth Cities

Year-over-year Growth	Apr 19	Apr 20	% Growth Y-o-Y
Pune	306	268	-12%
Jaipur	336	284	-15%
Mumbai	324	265	-18%
Chennai	270	207	-23%
Delhi-NCR	275	207	-25%

Month-over-month Trends for Key Industries & Occupations in Prime Cities:

- As hiring is stalled due to COVID lockdown across India, all key sectors and occupations reported decline across prime cities.

Industries/Cities

Month-over-month Growth	Bangalore	Chennai	Delhi-NCR	Hyderabad	Mumbai
Banking/ Financial Services, Insurance	-17%	-33%	-23%	-30%	-12%
BPO/ITES	-10%	-11%	-11%	-12%	-9%
Engineering, Cement, Construction, Iron/ Steel	-21%	-18%	-16%	-16%	-17%
IT - Hardware, Software	-6%	-5%	-5%	-6%	-3%
Production and Manufacturing	-15%	-24%	-11%	-15%	-21%

Occupations/Cities

Month-over-month Growth	Bangalore	Chennai	Delhi-NCR	Hyderabad	Mumbai
Marketing & Communications	-11%	-7%	-7%	-12%	-17%
Finance and Accounts	-13%	-29%	-12%	-26%	-14%
HR and Admin	-14%	-17%	-13%	-14%	-17%
Sales & Business Development	-13%	-16%	-10%	-14%	-16%
Software, Hardware, Telecom	-10%	-11%	-9%	-10%	-9%

By Industry

	2019										2020			
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	
IT - Hardware, Software	542	540	528	540	548	563	575	596	589	625	642	616	585	
BPO/ITES	228	232	224	216	216	218	219	217	220	225	228	200	150	
Engineering, Cement, Construction, Iron/Steel	234	221	217	224	222	232	238	250	253	266	270	260	217	
Banking/Financial Services/Insurance	384	373	384	392	391	383	379	397	416	445	468	415	334	
Education	304	294	305	308	304	338	344	308	300	301	340	312	277	
Production and Manufacturing	267	261	243	243	228	250	222	222	225	214	219	208	155	
Automotive/Ancillaries/Tyres	183	179	167	152	159	156	152	152	159	161	173	158	124	
Telecom/ISP	262	274	288	285	264	301	309	317	302	313	304	299	257	
Oil/Gas/Petroleum, Power	166	164	159	171	175	174	168	181	182	182	178	166	143	
Healthcare, Bio Technology & Life Sciences, Pharmaceuticals	381	374	374	378	395	397	399	409	398	422	449	421	349	
Advertising, Market Research, Public Relations	158	176	175	155	167	175	177	186	189	194	202	195	176	
Travel & Tourism	353	349	336	332	343	376	393	405	396	398	392	340	262	
Home Appliances	601	554	556	619	697	684	681	684	698	699	710	620	560	
Media & Entertainment	382	368	379	399	405	424	432	461	447	461	484	483	456	
Chemicals/Plastic/Rubber, Paints, Fertilizer/Pesticides	128	130	131	124	130	129	128	123	133	144	147	134	97	
Consumer Goods/FMCG, Food & Packaged Food	257	244	230	221	227	229	233	252	255	254	265	247	200	
Garments/Textiles/Leather, Gems & Jewellery	139	137	144	144	142	143	145	149	154	159	160	149	112	
Real Estate	175	176	179	180	179	174	176	177	182	185	186	178	147	
Retail	434	431	446	468	506	504	487	506	513	518	502	473	402	
Logistic, Courier/Freight/Transportation	268	258	249	241	254	246	246	241	254	262	266	254	213	
Import/Export	105	108	106	104	131	119	93	95	103	103	100	90	71	
Government/PSU/Defence	86	79	86	85	95	101	94	99	97	102	105	101	84	
Shipping/Marine	125	124	124	123	125	135	133	127	128	123	132	127	107	
Printing/Packaging	156	157	150	148	144	149	149	146	145	144	156	156	129	
NGO/Social Services	217	236	238	244	240	236	223	243	246	239	248	243	226	
Agro based industries	84	87	81	80	81	84	83	84	83	82	85	83	76	
Office Equipment/Automation	129	132	146	147	144	141	135	142	148	153	165	139	113	

By Occupation

	2019									2020			
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
Software, Hardware, Telecom	366	362	350	359	356	358	366	374	372	392	402	380	362
Customer Service	268	269	260	265	263	256	261	267	273	277	284	259	229
Engineering/Production	249	240	236	239	241	251	250	256	261	272	279	267	257
Finance & Accounts	270	280	278	271	272	270	267	269	277	291	292	267	215
Sales & Business Development	407	408	395	395	397	415	428	442	452	456	462	429	378
Senior Management	275	268	252	261	272	266	268	268	270	279	285	264	224
HR & Admin	232	233	224	221	222	218	214	217	220	220	224	209	178
Marketing & Communications	248	242	230	229	232	240	241	251	255	262	263	252	233
Health Care	446	435	433	432	443	439	444	441	423	463	488	457	377
Purchase/Logistics/Supply Chain	202	197	188	195	195	199	199	199	206	203	207	194	172
Hospitality & Travel	257	254	248	252	245	263	265	268	275	281	270	230	177
Legal	267	271	262	249	247	242	242	248	255	269	261	251	217
Arts/Creative	222	184	175	179	184	184	187	185	188	191	191	182	176

By Local Market

	2019									2020			
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
Mumbai	324	323	313	312	301	301	303	312	320	329	336	305	265
Bangalore	362	359	338	354	347	344	347	350	354	369	385	361	324
Delhi-NCR	275	250	240	242	239	237	240	240	248	251	251	233	207
Hyderabad	274	278	271	276	273	274	280	281	281	293	304	283	252
Chennai	270	249	239	251	245	245	245	247	251	251	261	239	207
Pune	306	299	294	304	299	304	295	297	309	317	329	302	268
Kolkata	347	349	342	374	388	390	387	403	412	425	417	387	391
Ahmedabad	346	342	337	369	376	377	391	385	401	413	415	385	357
Chandigarh	346	343	320	342	344	330	342	337	346	372	374	354	304
Kochi	264	258	256	262	263	268	275	275	280	290	305	279	240
Baroda	253	248	252	265	263	252	256	257	298	323	311	280	264
Coimbatore	303	301	304	315	293	304	291	303	315	311	308	294	266
Jaipur	336	315	316	321	312	308	316	317	317	329	318	291	284

About the Monster Employment Index

Launched in May 2010 with data collected since October 2009, the Monster Employment Index is a broad and comprehensive monthly analysis of online job posting activity in India conducted by Monster India. Based on a real-time review of millions of employer job opportunities culled from a large, representative selection of online career outlets, including Monster India, the Monster Employment Index presents a snapshot of employer online recruitment activity nationwide. Monster has taken due care in compiling and processing the data available from various sources for Monster Employment Index, but does not guarantee the accuracy, adequacy or completeness of any information and is not responsible for any errors or omissions or action / decision taken or for the results obtained from the use of such information.