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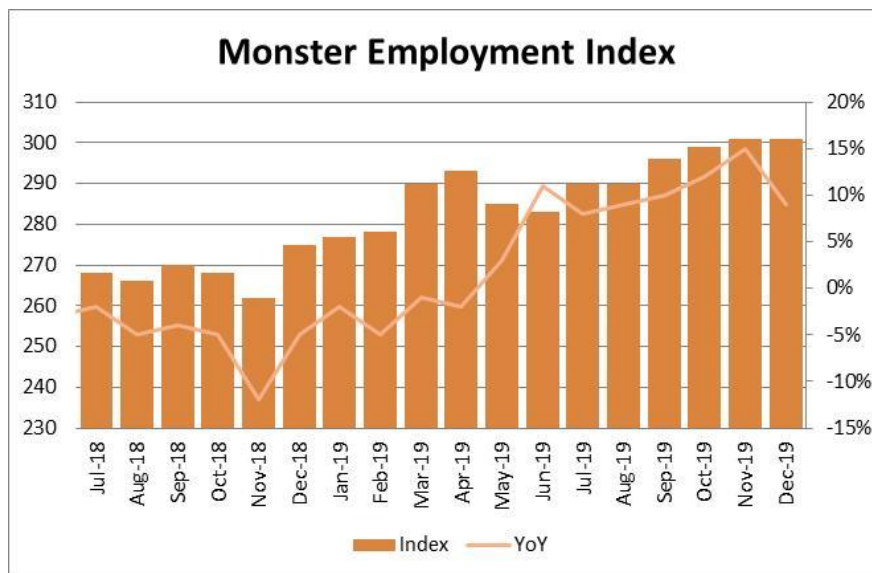
EMPLOYMENT INDEX

Monster Employment Index India

December 2019 Index Highlights:

- Monster Employment Index India witnesses annual growth of nine percent in December 2019.
- Month-on-month registers no growth.
- Retail leads among the monitored industry sectors, year-on-year.
- Agro based industries indicates the steepest decline from the year-ago level.
- Among job-roles, Hospitality & Travel professionals witness the most-notable annual growth in online demand.
- Baroda charts the steepest growth among monitored cities and Jaipur registers the least growth.

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:

Jul 18	Aug 18	Sep 18	Oct 18	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	Y-O-Y
268	266	270	268	262	275	277	278	290	293	285	283	290	290	296	299	301	301	9%

Industry Year-over-year Trends: Online demand exceeded the year-ago level in 22 of the 27 industry sectors monitored by the Index.

- Online hiring activity in **Retail** (up 46 percent) continued to lead annual growth among industry sectors. In short-term as well, the sector fared well on all parameters; up one percent (month-on-month), up two percent (three-month) and up 15 percent (six-month).
- **Travel and Tourism** (up 24 percent) witnessed double-digit annual growth throughout 2019; and also ranked among top growth industries this month. However, growth momentum eased by seven percentage points vis-à-vis 31 percent growth in November 2019. On six-month basis, the sector registered hike of 18 percent; the steepest in the last 10 months.
- E-recruitment activity in **IT - Hardware, Software** (up 11 percent) witnessed uptrend in online recruitment activity for the seventh consecutive month. In short-run, the sector recorded growth of five percent and 12 percent on three-month and six-month basis respectively. **Telecom/ISP** (up 27 percent) continued to rank among the top hiring sectors since October 2019. Monthly demand witnessed decline of five percent.
- **Banking/ Financial Services, Insurance** (up 18 percent) charted the steepest year-on-year hike since July 2019. Pace of growth also improved by five percentage points compared to 13 percent last month. On month-on-month (up five percent), three-month (up nine percent) and six-month (up eight percent) basis as well, the sector registered growth.
- **Agro based industries** (down 50 percent) exhibited the steepest year-on-year decline among the monitored sectors.

Top Growth Industries

Year-over-year Growth	Dec 18	Dec 19	% Growth Y-o-Y
Retail	351	513	46%
Media & Entertainment	348	447	28%
Home Appliances	544	698	28%
Telecom/ISP	237	302	27%
Travel and Tourism	319	396	24%

Lowest Growth Industries

Year-over-year Growth	Dec 18	Dec 19	% Growth Y-o-Y
Printing/ Packaging	146	145	-1%
Import / Export	105	103	-2%
Production and Manufacturing	234	225	-4%
Automotive/ Ancillaries / Tyres	185	159	-14%
Agro based industries	165	83	-50%

E-Commerce: E-commerce witnessed decline of eight percent between December 2018 and 2019. Even in short-run, the sector saw receded growth; down two percent (month-on-month), down seven percent (three-month) and down six percent (six-month).

Jul 18	Aug 18	Sep 18	Oct 18	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	Y-O-Y
117	112	116	121	121	123	130	132	132	135	125	120	122	121	121	112	115	113	-8%

Occupation Year-over-year Trends: Online demand for professionals witnessed growth in 11 of the 13 occupation groups monitored by the Index on annual basis.

- Year-on-year, **Hospitality & Travel** (up 24 percent) professional led growth in online demand in December 2019. The job-role saw uptrend in growth in short-run as well; up three percent (month-on-month), up five percent (three-month) and up 11 percent (six-month). Professionals at entry level (0-3 years) witness the most-notable growth in demand; up at 28 percent.
- **Sales & Business Development** (up 22 percent) professionals continued to chart double-digit growth for the third consecutive month. The job-role led growth among others on three-month and six-month basis; up nine percent and 14 percent respectively. Demand for professionals was high at mid-senior (7-10 years), entry (0-3 years) and intermediate (4-6 years) levels; up by 30 percent, 27 percent and 21 percent.
- Online demand for **Customer Service** professionals saw nine percent growth on annual basis. The job-role out-performed on other parameter as well; up two percent (month-on-month), up seven percent (three-month) and up five percent (six-month). Growth was mostly propelled by demand for professionals at intermediate level (4-6 years); up by three percent.
- **Purchase/ Logistics/ Supply Chain** (up one percent) saw positive annual growth for the second month in a row. Monthly demand charted growth of four percent in December 2019; the steepest among others.
- **HR & Admin** (down six percent) is the only job-role to record negative growth among occupation groups, on-the-year.

Top Growth Occupations

Year-over-year Growth	Dec 18	Dec 19	% Growth Y-o-Y
Hospitality & Travel	221	275	24%
Sales & Business Development	370	452	22%
Senior Management	245	270	10%
Software, Hardware, Telecom	341	372	9%
Finance & Accounts	254	277	9%

Lowest Growth Occupations

Year-over-year Growth	Dec 18	Dec 19	% Growth Y-o-Y
Marketing & Communications	239	255	7%
Purchase/ Logistics/ Supply Chain	204	206	1%
Health Care	420	423	1%
Legal	255	255	0%
HR & Admin	235	220	-6%

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
Hospitality & Travel	28%	10%	-1%	-19%	-57%
Sales & Business Development	27%	21%	30%	6%	-11%
Software, Hardware, Telecom	4%	10%	11%	7%	-2%
Finance & Accounts	4%	10%	9%	-10%	-24%
Customer Service	-1%	3%	-2%	-13%	-9%

Geographic Year-over-year Trends: 12 of the 13 monitored cities by the Index witnessed positive annual growth in online hiring.

- Online hiring activity in **Baroda** (up 31 percent) led growth among monitored cities between December 2018 and 2019. This was followed by **Kolkata** and **Ahmedabad**; up by 26 percent and 25 percent respectively.
- All of the key cities recorded uptrend in e-recruitment activity; **Hyderabad** (up seven percent), **Delhi-NCR** (up six percent), **Bangalore** (up five percent), **Chennai** (up four percent) and **Mumbai** (up three percent).
- All monitored cities except **Chandigarh** (zero percent) witnessed positive annual growth in December 2019.

Top Growth Cities

Year-over-year Growth	Dec 18	Dec 19	% Growth Y-o-Y
Baroda	227	298	31%
Kolkata	328	412	26%
Ahmedabad	321	401	25%
Kochi	258	280	9%
Pune	287	309	8%

Lowest Growth Cities

Year-over-year Growth	Dec 18	Dec 19	% Growth Y-o-Y
Coimbatore	302	315	4%
Chennai	241	251	4%
Mumbai	312	320	3%
Jaipur	314	317	1%
Chandigarh	345	346	0%

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

- **Banking/ Financial Services, Insurance** saw increased hiring demand in all the key cities. Chennai and Delhi-NCR (both at 10 percent) lead monthly growth followed by Hyderabad (up eight percent), Bangalore (up three percent) and Mumbai (up one percent).
- Chennai (up eight percent) saw the most-notable growth in hiring activity in **Production and Manufacturing** sector. Hyderabad and Mumbai followed up by four percent and three percent respectively.
- Among occupation groups, **Marketing & Communications** and **Sales & Business Development** professionals were in demand in all the key cities. **Finance and Accounts** and **HR and Admin** were most in-demand in Delhi-NCR; whereas, demand for **Software, Hardware, Telecom** professionals was led by Chennai.

Industries/Cities

Month-over-month Growth	Bangalore	Chennai	Delhi-NCR	Hyderabad	Mumbai
Banking/ Financial Services, Insurance	3%	10%	10%	8%	1%
BPO/ITES	-3%	-7%	5%	-3%	0%
Engineering, Cement, Construction, Iron/ Steel	0%	-3%	1%	2%	0%
IT - Hardware, Software	0%	2%	2%	0%	2%
Production and Manufacturing	-1%	8%	1%	4%	3%

Occupations/Cities

Month-over-month Growth	Bangalore	Chennai	Delhi-NCR	Hyderabad	Mumbai
Marketing & Communications	8%	3%	2%	8%	5%
Finance and Accounts	0%	1%	3%	1%	2%
HR and Admin	0%	-3%	4%	-4%	2%
Sales & Business Development	2%	6%	3%	4%	4%
Software, Hardware, Telecom	0%	3%	2%	0%	2%

By Industry

	2018	2019											
	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
IT - Hardware, Software	529	535	530	548	542	540	528	540	548	563	575	596	589
BPO/ITES	201	199	199	227	228	232	224	216	216	218	219	217	220
Engineering, Cement, Construction, Iron/Steel	214	209	212	219	234	221	217	224	222	232	238	250	253
Banking/Financial Services/Insurance	354	359	364	378	384	373	384	392	391	383	379	397	416
Education	296	307	319	306	304	294	305	308	304	338	344	308	300
Production and Manufacturing	234	246	242	239	267	261	243	243	228	250	222	222	225
Automotive/Ancillaries/Tyres	185	186	187	193	183	179	167	152	159	156	152	152	159
Telecom/ISP	237	240	259	253	262	274	288	285	264	301	309	317	302
Oil/Gas/Petroleum, Power	160	158	160	169	166	164	159	171	175	174	168	181	182
Healthcare, Bio Technology & Life Sciences, Pharmaceuticals	372	379	383	382	381	374	374	378	395	397	399	409	398
Advertising, Market Research, Public Relations	156	156	162	164	158	176	175	155	167	175	177	186	189
Travel & Tourism	319	319	322	342	353	349	336	332	343	376	393	405	396
Home Appliances	544	558	561	588	601	554	556	619	697	684	681	684	698
Media & Entertainment	348	347	357	368	382	368	379	399	405	424	432	461	447
Chemicals/Plastic/Rubber, Paints, Fertilizer/Pesticides	125	124	123	129	128	130	131	124	130	129	128	123	133
Consumer Goods/FMCG, Food & Packaged Food	251	249	255	267	257	244	230	221	227	229	233	252	255
Garments/Textiles/Leather, Gems & Jewellery	131	133	135	138	139	137	144	144	142	143	145	149	154
Real Estate	172	171	171	176	175	176	179	180	179	174	176	177	182
Retail	351	370	325	394	434	431	446	468	506	504	487	506	513
Logistic, Courier/Freight/Transportation	245	270	249	265	268	258	249	241	254	246	246	241	254
Import/Export	105	101	100	99	105	108	106	104	131	119	93	95	103
Government/PSU/Defence	87	88	88	86	86	79	86	85	95	101	94	99	97
Shipping/Marine	127	127	133	124	125	124	124	123	125	135	133	127	128
Printing/Packaging	146	162	159	157	156	157	150	148	144	149	149	146	145
NGO/Social Services	244	234	233	225	217	236	238	244	240	236	223	243	246
Agro based industries	165	121	91	109	84	87	81	80	81	84	83	84	83
Office Equipment/Automation	124	134	135	130	129	132	146	147	144	141	135	142	148

By Occupation

	2018	2019											
	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Software, Hardware, Telecom	341	350	350	364	366	362	350	359	356	358	366	374	372
Customer Service	251	251	258	265	268	269	260	265	263	256	261	267	273
Engineering/Production	241	240	236	243	249	240	236	239	241	251	250	256	261
Finance & Accounts	254	251	249	267	270	280	278	271	272	270	267	269	277
Sales & Business Development	370	387	395	406	407	408	395	395	397	415	428	442	452
Senior Management	245	254	257	275	275	268	252	261	272	266	268	268	270
HR & Admin	235	233	227	235	232	233	224	221	222	218	214	217	220
Marketing & Communications	239	243	247	252	248	242	230	229	232	240	241	251	255
Health Care	420	435	439	451	446	435	433	432	443	439	444	441	423
Purchase/Logistics/Supply Chain	204	199	198	202	202	197	188	195	195	199	199	199	206
Hospitality & Travel	221	219	220	244	257	254	248	252	245	263	265	268	275
Legal	255	251	252	265	267	271	262	249	247	242	242	248	255
Arts/Creative	175	176	212	227	222	184	175	179	184	184	187	185	188

By Local Market

	2018	2019											
	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Mumbai	312	308	317	323	324	323	313	312	301	301	303	312	320
Bangalore	336	340	347	365	362	359	338	354	347	344	347	350	354
Delhi-NCR	233	232	241	247	275	250	240	242	239	237	240	240	248
Hyderabad	262	257	262	272	274	278	271	276	273	274	280	281	281
Chennai	241	236	241	252	270	249	239	251	245	245	245	247	251
Pune	287	290	292	299	306	299	294	304	299	304	295	297	309
Kolkata	328	336	344	350	347	349	342	374	388	390	387	403	412
Ahmedabad	321	320	326	341	346	342	337	369	376	377	391	385	401
Chandigarh	345	350	343	352	346	343	320	342	344	330	342	337	346
Kochi	258	256	262	272	264	258	256	262	263	268	275	275	280
Baroda	227	223	234	246	253	248	252	265	263	252	256	257	298
Coimbatore	302	280	293	301	303	301	304	315	293	304	291	303	315
Jaipur	314	317	322	331	336	315	316	321	312	308	316	317	317

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.