

monster[®]

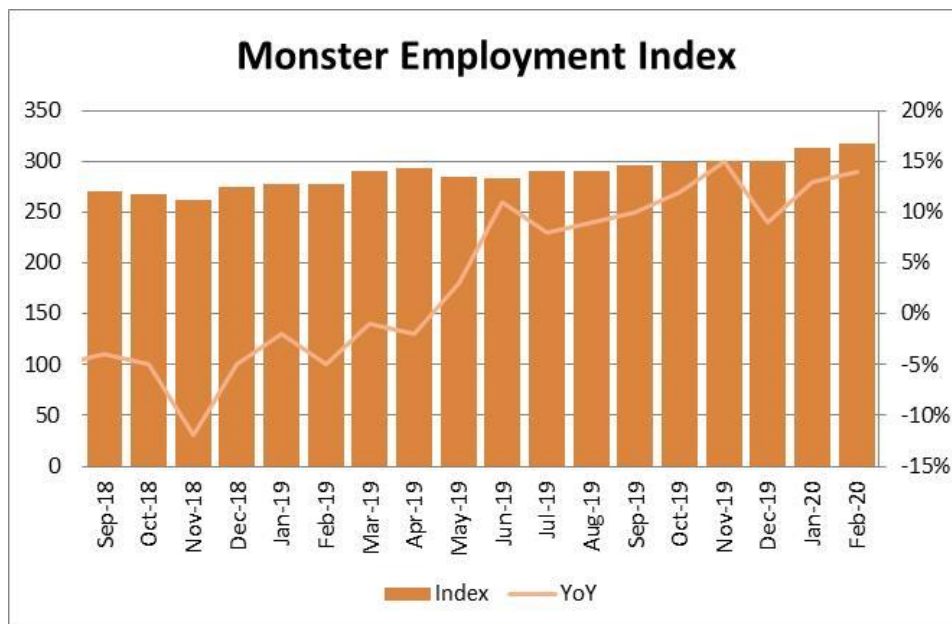
EMPLOYMENT INDEX

Monster Employment Index India

February 2020 Index Highlights:

- Monster Employment Index India witnesses annual growth of 14 percent in February 2020.
- Month-on-month registers uptrend of two percent.
- Retail leads among the monitored industry sectors, year-on-year.
- Production and Manufacturing 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; whereas, Jaipur is the only city to register annual decline.

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:

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	Jan 20	Feb 20	Y-O-Y
270	268	262	275	277	278	290	293	285	283	290	290	296	299	301	301	313	318	14%

Industry Year-over-year Trends: Online demand exceeded the year-ago level in 21 of the 27 industry sectors monitored by the Index.

- **Retail** (up 54 percent) registered the most-notable growth among industry sectors from the year-ago level. Between January and February 2020, growth momentum paced up by 14 percentage points. However, on-the-month, the sector recorded decline of three percent.
- Year-on-year, **Banking/ Financial Services, Insurance** saw double digit growth of 29 percent in February 2020. This was the steepest hike in the series since May 2018. In short-term as well, the sector fared well; up five percent (month-on-month), up 18 percent (three-month) and up 20 percent (six-month).
- **IT - Hardware, Software** (up 21 percent) continued to witness uptrend in online hiring activity for the ninth consecutive month on annual basis. Pace of growth picked up by four percentage points; up from 17 percent in January 2020. **BPO/ITES** (up 15 percent) saw the most-notable growth in the last six-month, on-the-year. Monthly demand increased marginally by one percent.
- E-recruitment activity in **Healthcare, Bio Technology & Life Sciences, Pharmaceuticals** charted year-on-year growth of 17 percent; up from 11 percent last month. The sector registered increased demand on month-on-month (up six percent), three-month (up 10 percent) and six-month (up 14 percent) basis.
- **Education** (up seven percent) recovered positive annual growth in February 2020; up from decline of two percent in January 2020. On-the-month (up 13 percent), the sector witnessed the steepest growth among others.
- **Production and Manufacturing** (down 10 percent) indicated the most-notable annual decline among industry sectors this month.

Top Growth Industries

Year-over-year Growth	Feb 19	Feb 20	% Growth Y-o-Y
Retail	325	502	54%
Media & Entertainment	357	484	36%
Banking/ Financial Services , Insurance	364	468	29%
Engineering, Cement, Construction, Iron/ Steel	212	270	27%
Home Appliances	561	710	27%

Lowest Growth Industries

Year-over-year Growth	Feb 19	Feb 20	% Growth Y-o-Y
Shipping/Marine	133	132	-1%
Printing/ Packaging	159	156	-2%
Agro based industries	91	85	-7%
Automotive/ Ancillaries / Tyres	187	173	-7%
Production and Manufacturing	242	219	-10%

E-Commerce: E-commerce exhibited de-growth of 13 percent in February 2020 from the year-ago level. In the short-run, the sector saw increased demand on month-on-month (up one percent) basis.

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	Jan 20	Feb 20	Y-O-Y
116	121	121	123	130	132	132	135	125	120	122	121	121	112	115	113	114	115	-13%

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.

- Annual online demand for **Hospitality & Travel** (up 23 percent) professionals continued to witness double-digit growth since September 2019. On six-month basis, the job-role saw a leap of 10 percent. Growth was primarily propelled by rise in demand at entry (0-3 years) and intermediate (4-6 years) level; up by 30 percent and 17 percent respectively.
- **Engineering /Production** (up 18 percent) ranked among top growth occupations for the second consecutive month, on-the-year. The short-term growth parameters also indicated increased hiring for Engineering/Production professionals; up three percent (month-on-month), up nine (three-month) and up 16 percent (six-month). Professionals at intermediate (4-6 years), mid-senior (7-10), senior (11-15) and top management level (\geq 16 years) charted growth.
- Long-term growth momentum in **Health Care** (up 11 percent) saw improved growth of five percentage points vis-à-vis last month. In short-term, the job-role recorded the steepest growth among others on month-on-month (up five percent) and three-month (up 11 percent) basis.
- **Arts/Creative** (down 10 percent) professionals recorded the steepest annual decline among occupation groups this month.

Top Growth Occupations

Year-over-year Growth	Feb 19	Feb 20	% Growth Y-o-Y
Hospitality & Travel	220	270	23%
Engineering /Production	236	279	18%
Finance & Accounts	249	292	17%
Sales & Business Development	395	462	17%
Software, Hardware, Telecom	350	402	15%

Lowest Growth Occupations

Year-over-year Growth	Feb 19	Feb 20	% Growth Y-o-Y
Marketing & Communications	247	263	6%
Purchase/ Logistics/ Supply Chain	198	207	5%
Legal	252	261	4%
HR & Admin	227	224	-1%
Arts/Creative	212	191	-10%

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	30%	17%	8%	-18%	-65%
Engineering /Production	-4%	5%	5%	6%	4%
Finance & Accounts	24%	29%	28%	-12%	-28%
Sales & Business Development	33%	25%	27%	3%	-15%
Software, Hardware, Telecom	19%	17%	20%	12%	-4%

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

- **Baroda** (up 33 percent) continued to lead online recruitment activity among others, on-the-year. In short-term as well, demand increased; up 21 percent (three-month) and up 18 percent (six-month). This was closely followed by **Ahmedabad** (up 27 percent) and **Kolkata** (up 21 percent).
- All the key cities indicated growth in online hiring activity; **Hyderabad** (up 16 percent), **Bangalore** (up 11 percent), **Chennai** (up eight percent), **Mumbai** (up six percent) and **Delhi-NCR** (up four percent).
- **Jaipur** (down one percent) is the only city to witness receded growth in February 2020, on-the-year.

Top Growth Cities

Year-over-year Growth	Feb 19	Feb 20	% Growth Y-o-Y
Baroda	234	311	33%
Ahmedabad	326	415	27%
Kolkata	344	417	21%
Kochi	262	305	16%
Hyderabad	262	304	16%

Lowest Growth Cities

Year-over-year Growth	Feb 19	Feb 20	% Growth Y-o-Y
Chennai	241	261	8%
Mumbai	317	336	6%
Coimbatore	293	308	5%
Delhi-NCR	241	251	4%
Jaipur	322	318	-1%

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

- Delhi-NCR aside, all key cities recorded increase in hiring demand in **Banking/ Financial Services, Insurance** sector this month; up by 15 percent in Hyderabad and up three percent in Bangalore, Chennai and Mumbai
- **BPO/ITES** and **IT - Hardware, Software** recorded increased monthly demand in all the key cities. **Production and Manufacturing** and **Engineering, Cement, Construction, Iron/ Steel** saw the most notable jump in Chennai; up by seven percent each.
- Among occupation groups, **Finance and Accounts** led double-digit growth in Hyderabad; up by 12 percent. **HR and Admin, Sales & Business Development** and **Software, Hardware, Telecom** professionals were sought after in all key cities

Industries/Cities

Month-over-month Growth	Bangalore	Chennai	Delhi-NCR	Hyderabad	Mumbai
Banking/ Financial Services, Insurance	3%	3%	-2%	15%	3%
BPO/ITES	10%	11%	3%	10%	11%
Engineering, Cement, Construction, Iron/ Steel	2%	7%	-1%	6%	6%

IT - Hardware, Software	10%	6%	1%	6%	5%
Production and Manufacturing	5%	7%	-5%	3%	0%

Occupations/Cities

Month-over-month Growth	Bangalore	Chennai	Delhi-NCR	Hyderabad	Mumbai
Marketing & Communications	-6%	6%	-1%	-9%	5%
Finance and Accounts	6%	-1%	1%	12%	7%
HR and Admin	2%	6%	1%	4%	5%
Sales & Business Development	4%	5%	3%	4%	10%
Software, Hardware, Telecom	8%	7%	1%	5%	5%

By Industry

	2019											2020	
	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
IT - Hardware, Software	530	548	542	540	528	540	548	563	575	596	589	625	642
BPO/ITES	199	227	228	232	224	216	216	218	219	217	220	225	228
Engineering, Cement, Construction, Iron/Steel	212	219	234	221	217	224	222	232	238	250	253	266	270
Banking/Financial Services/Insurance	364	378	384	373	384	392	391	383	379	397	416	445	468
Education	319	306	304	294	305	308	304	338	344	308	300	301	340
Production and Manufacturing	242	239	267	261	243	243	228	250	222	222	225	214	219
Automotive/Ancillaries/Tyres	187	193	183	179	167	152	159	156	152	152	159	161	173
Telecom/ISP	259	253	262	274	288	285	264	301	309	317	302	313	304
Oil/Gas/Petroleum, Power	160	169	166	164	159	171	175	174	168	181	182	182	178
Healthcare, Bio Technology & Life Sciences, Pharmaceuticals	383	382	381	374	374	378	395	397	399	409	398	422	449
Advertising, Market Research, Public Relations	162	164	158	176	175	155	167	175	177	186	189	194	202
Travel & Tourism	322	342	353	349	336	332	343	376	393	405	396	398	392
Home Appliances	561	588	601	554	556	619	697	684	681	684	698	699	710
Media & Entertainment	357	368	382	368	379	399	405	424	432	461	447	461	484
Chemicals/Plastic/Rubber, Paints, Fertilizer/Pesticides	123	129	128	130	131	124	130	129	128	123	133	144	147
Consumer Goods/FMCG, Food & Packaged Food	255	267	257	244	230	221	227	229	233	252	255	254	265
Garments/Textiles/Leather, Gems & Jewellery	135	138	139	137	144	144	142	143	145	149	154	159	160
Real Estate	171	176	175	176	179	180	179	174	176	177	182	185	186
Retail	325	394	434	431	446	468	506	504	487	506	513	518	502

Logistic, Courier/Freight/Transportation	249	265	268	258	249	241	254	246	246	241	254	262	266
Import/Export	100	99	105	108	106	104	131	119	93	95	103	103	100
Government/PSU/Defence	88	86	86	79	86	85	95	101	94	99	97	102	105
Shipping/Marine	133	124	125	124	124	123	125	135	133	127	128	123	132
Printing/Packaging	159	157	156	157	150	148	144	149	149	146	145	144	156
NGO/Social Services	233	225	217	236	238	244	240	236	223	243	246	239	248
Agro based industries	91	109	84	87	81	80	81	84	83	84	83	82	85
Office Equipment/Automation	135	130	129	132	146	147	144	141	135	142	148	153	165

By Occupation

	2019											2020	
	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Software, Hardware, Telecom	350	364	366	362	350	359	356	358	366	374	372	392	402
Customer Service	258	265	268	269	260	265	263	256	261	267	273	277	284
Engineering/Production	236	243	249	240	236	239	241	251	250	256	261	272	279
Finance & Accounts	249	267	270	280	278	271	272	270	267	269	277	291	292
Sales & Business Development	395	406	407	408	395	395	397	415	428	442	452	456	462
Senior Management	257	275	275	268	252	261	272	266	268	268	270	279	285
HR & Admin	227	235	232	233	224	221	222	218	214	217	220	220	224
Marketing & Communications	247	252	248	242	230	229	232	240	241	251	255	262	263
Health Care	439	451	446	435	433	432	443	439	444	441	423	463	488
Purchase/Logistics/Supply Chain	198	202	202	197	188	195	195	199	199	199	206	203	207
Hospitality & Travel	220	244	257	254	248	252	245	263	265	268	275	281	270
Legal	252	265	267	271	262	249	247	242	242	248	255	269	261
Arts/Creative	212	227	222	184	175	179	184	184	187	185	188	191	191

By Local Market

	2019											2020	
	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Mumbai	317	323	324	323	313	312	301	301	303	312	320	329	336
Bangalore	347	365	362	359	338	354	347	344	347	350	354	369	385

Delhi-NCR	241	247	275	250	240	242	239	237	240	240	248	251	251
Hyderabad	262	272	274	278	271	276	273	274	280	281	281	293	304
Chennai	241	252	270	249	239	251	245	245	245	247	251	251	261
Pune	292	299	306	299	294	304	299	304	295	297	309	317	329
Kolkata	344	350	347	349	342	374	388	390	387	403	412	425	417
Ahmedabad	326	341	346	342	337	369	376	377	391	385	401	413	415
Chandigarh	343	352	346	343	320	342	344	330	342	337	346	372	374
Kochi	262	272	264	258	256	262	263	268	275	275	280	290	305
Baroda	234	246	253	248	252	265	263	252	256	257	298	323	311
Coimbatore	293	301	303	301	304	315	293	304	291	303	315	311	308
Jaipur	322	331	336	315	316	321	312	308	316	317	317	329	318

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.