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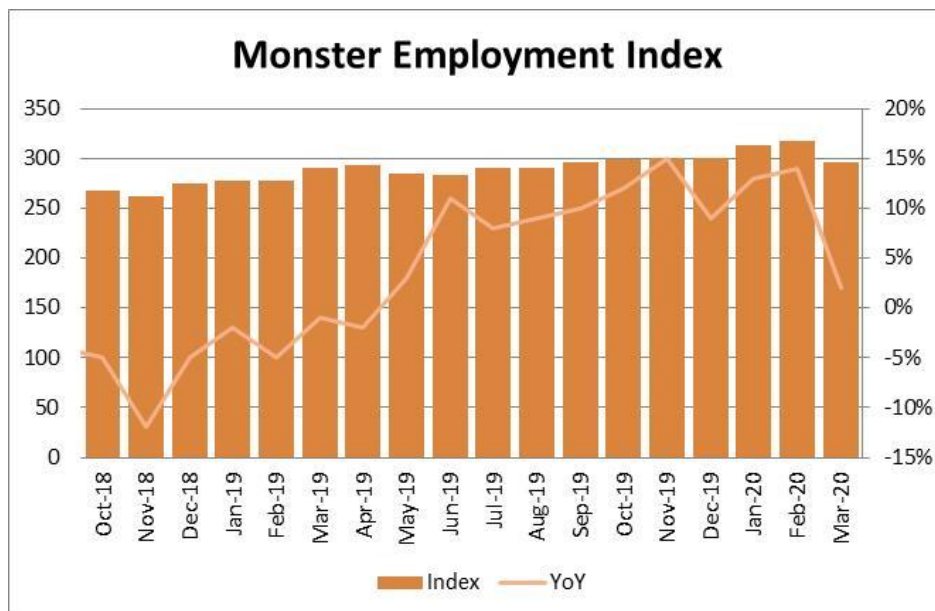
EMPLOYMENT INDEX

Monster Employment Index India

March 2020 Index Highlights:

- Monster Employment Index India registers marginal growth of two percent from the year-ago level.
- Month-on-month eased by seven percent.
- Media & Entertainment leads among the monitored industry sectors, year-on-year.
- Agro based industries indicates the steepest decline from the year-ago level.
- Among job-roles, Engineering /Production professionals witness the most-notable annual growth in online demand.
- Baroda charts the steepest growth among monitored cities; whereas, Jaipur 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:

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	Mar 20	Y-O-Y
268	262	275	277	278	290	293	285	283	290	290	296	299	301	301	313	318	296	2%

Industry Year-over-year Trends: Online hiring demand exceeded the year-ago level in 17 of the 27 industry sectors monitored by the Index.

- Year-on-year, **Media & Entertainment** (up 31 percent) led online hiring activity among industry sectors. However, growth momentum eased by five percentage points compared to 36 percent leap last month. In short term as well, the sector saw positive growth; up eight percent (three-month) and up 14 percent (six-month).
- **Advertising, Market Research, Public Relations** (up 19 percent) ranked among top hiring sectors in March 2020, on-the-year. The sector witnessed increased demand on three-month (up three percent) and six-month (up 11 percent) basis as well.
- Online hiring activity in **IT - Hardware, Software** (up 12 percent) continued to register double-digit annual growth since October 2019. Though, monthly demand declined by four percent in March 2020. **BPO/ITES** (down 12 percent) witnessed year-on-year decline in March following a series of vigorous growth in the past months.
- **Banking/ Financial Services, Insurance** (up 10 percent) saw uptrend in e-recruitment activity in March 2020, on-the-year. Pace of growth eased by 19 percentage points; down from 29 percent last month. On six-month basis, the sector registered hike of eight percent.
- **Agro based industries** (down 24 percent) indicated the most-notable annual decline among industry sectors this month.

Top Growth Industries

Year-over-year Growth	Mar 19	Mar 20	% Growth Y-o-Y
Media & Entertainment	368	483	31%
Retail	394	473	20%
Advertising, Market Research, Public Relations (PR)	164	195	19%
Engineering, Cement, Construction, Iron/ Steel	219	260	19%
Telecom/ISP	253	299	18%

Lowest Growth Industries

Year-over-year Growth	Mar 19	Mar 20	% Growth Y-o-Y
Import / Export	99	90	-9%
BPO/ITES	227	200	-12%
Production and Manufacturing	239	208	-13%
Automotive/ Ancillaries / Tyres	193	158	-18%
Agro based industries	109	83	-24%

E-Commerce: E-commerce saw annual decline of 15 percent in March 2020. On-the-month as well, the sector recorded negative growth of two percent.

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	Mar 20	Y-O-Y
121	121	123	130	132	132	135	125	120	122	121	121	112	115	113	114	115	113	-15%

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

- Online demand for **Engineering /Production** (up 10 percent) professionals was most-notable among the monitored job-roles in March 2020. Pace of growth slowed down by eight percentage points; down from 18 percent last month. Professionals at all experience level saw decreased annual demand.
- **Software, Hardware, Telecom** witnessed leap in year-on-year demand by four percent; down from 15 percent in February 2020. On six-month basis, the job-role recorded growth of six percent. Demand was primarily led by mid-senior (7-10 years) level professionals; up by four percent.
- Year-on-year, **Health Care** (up one percent) professionals continued to witness increased online demand. The job-role fared well in short-term as well; up eight percent (three-month) and up four percent (six-month). Entry level (0-3 years) professionals were most in-demand across experience level; up by 25 percent.
- **Hospitality & Travel** (down six percent) witnessed receded annual growth for the first time since May 2019. In short-term, the job-role exhibited the steepest decline among others on all parameters; down 15 percent (month-on-month), down 16 percent (three-month) and down 13 percent (six-month).
- **Arts/Creative** (down 20 percent) professionals recorded the steepest annual decline among occupation groups this month.

Top Growth Occupations

Year-over-year Growth	Mar 19	Mar 20	% Growth Y-o-Y
Engineering /Production	243	267	10%
Sales & Business Development	406	429	6%
Software, Hardware, Telecom	364	380	4%
Health Care	451	457	1%
Finance & Accounts	267	267	0%

Lowest Growth Occupations

Year-over-year Growth	Mar 19	Mar 20	% Growth Y-o-Y
Senior Management	275	264	-4%
Legal	265	251	-5%
Hospitality & Travel	244	230	-6%
HR & Admin	235	209	-11%
Arts/Creative	227	182	-20%

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	-23%	-10%	-5%	-8%	-7%
Sales & Business Development	17%	12%	10%	-7%	-17%
Software, Hardware, Telecom	0%	1%	4%	-2%	-7%
Health Care	25%	-7%	-7%	-10%	-14%
Finance & Accounts	2%	8%	5%	-22%	-24%

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

- **Baroda** (up 14 percent) continued to lead online recruitment activity among others, on-the-year. This was closely followed by **Ahmedabad** (up 13 percent) and **Kolkata** (up 11 percent).
- Of the key cities, only **Hyderabad** (up four percent) charted growth in online hiring activity. **Bangalore** (down one percent), **Chennai** (down five percent), **Mumbai** and **Delhi** (down six percent) registered decline.
- **Jaipur** (down 12 percent) saw the steepest year-on-year decline among the monitored cities in March 2020.

Top Growth Cities

Year-over-year Growth	Mar 19	Mar 20	% Growth Y-o-Y
Baroda	246	280	14%
Ahmedabad	341	385	13%
Kolkata	350	387	11%
Hyderabad	272	283	4%
Kochi	272	279	3%

Lowest Growth Cities

Year-over-year Growth	Mar 19	Mar 20	% Growth Y-o-Y
Coimbatore	301	294	-2%
Chennai	252	239	-5%
Mumbai	323	305	-6%
Delhi-NCR	247	233	-6%
Jaipur	331	291	-12%

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

- **BPO/ITES** (up two percent) recorded increased monthly demand in Delhi-NCR alone.
- Rest all the key sectors and occupations reported either decline or no growth across all prime cities.

Industries/Cities

Month-over-month Growth	Bangalore	Chennai	Delhi-NCR	Hyderabad	Mumbai
Banking/ Financial Services, Insurance	-3%	-5%	-12%	-1%	-4%
BPO/ITES	2%	-11%	-6%	-14%	-6%
Engineering, Cement, Construction, Iron/ Steel	-3%	-6%	-5%	-5%	-4%
IT - Hardware, Software	-8%	-6%	-6%	-4%	-8%
Production and Manufacturing	0%	-9%	-3%	-6%	-11%

Occupations/Cities

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

By Industry

	2019											2020	
	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
IT - Hardware, Software	548	542	540	528	540	548	563	575	596	589	625	642	616
BPO/ITES	227	228	232	224	216	216	218	219	217	220	225	228	200
Engineering, Cement, Construction, Iron/Steel	219	234	221	217	224	222	232	238	250	253	266	270	260
Banking/Financial Services/Insurance	378	384	373	384	392	391	383	379	397	416	445	468	415
Education	306	304	294	305	308	304	338	344	308	300	301	340	312
Production and Manufacturing	239	267	261	243	243	228	250	222	222	225	214	219	208
Automotive/Ancillaries/Tyres	193	183	179	167	152	159	156	152	152	159	161	173	158
Telecom/ISP	253	262	274	288	285	264	301	309	317	302	313	304	299
Oil/Gas/Petroleum, Power	169	166	164	159	171	175	174	168	181	182	182	178	166
Healthcare, Bio Technology & Life Sciences, Pharmaceuticals	382	381	374	374	378	395	397	399	409	398	422	449	421
Advertising, Market Research, Public Relations	164	158	176	175	155	167	175	177	186	189	194	202	195
Travel & Tourism	342	353	349	336	332	343	376	393	405	396	398	392	340
Home Appliances	588	601	554	556	619	697	684	681	684	698	699	710	620
Media & Entertainment	368	382	368	379	399	405	424	432	461	447	461	484	483
Chemicals/Plastic/Rubber, Paints, Fertilizer/Pesticides	129	128	130	131	124	130	129	128	123	133	144	147	134
Consumer Goods/FMCG, Food & Packaged Food	267	257	244	230	221	227	229	233	252	255	254	265	247
Garments/Textiles/Leather, Gems & Jewellery	138	139	137	144	144	142	143	145	149	154	159	160	149
Real Estate	176	175	176	179	180	179	174	176	177	182	185	186	178
Retail	394	434	431	446	468	506	504	487	506	513	518	502	473
Logistic, Courier/Freight/Transportation	265	268	258	249	241	254	246	246	241	254	262	266	254
Import/Export	99	105	108	106	104	131	119	93	95	103	103	100	90
Government/PSU/Defence	86	86	79	86	85	95	101	94	99	97	102	105	101
Shipping/Marine	124	125	124	124	123	125	135	133	127	128	123	132	127
Printing/Packaging	157	156	157	150	148	144	149	149	146	145	144	156	156
NGO/Social Services	225	217	236	238	244	240	236	223	243	246	239	248	243
Agro based industries	109	84	87	81	80	81	84	83	84	83	82	85	83
Office Equipment/Automation	130	129	132	146	147	144	141	135	142	148	153	165	139

By Occupation

	2019											2020	
	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
Software, Hardware, Telecom	364	366	362	350	359	356	358	366	374	372	392	402	380
Customer Service	265	268	269	260	265	263	256	261	267	273	277	284	259
Engineering/Production	243	249	240	236	239	241	251	250	256	261	272	279	267
Finance & Accounts	267	270	280	278	271	272	270	267	269	277	291	292	267
Sales & Business Development	406	407	408	395	395	397	415	428	442	452	456	462	429
Senior Management	275	275	268	252	261	272	266	268	268	270	279	285	264
HR & Admin	235	232	233	224	221	222	218	214	217	220	220	224	209
Marketing & Communications	252	248	242	230	229	232	240	241	251	255	262	263	252
Health Care	451	446	435	433	432	443	439	444	441	423	463	488	457
Purchase/Logistics/Supply Chain	202	202	197	188	195	195	199	199	199	206	203	207	194
Hospitality & Travel	244	257	254	248	252	245	263	265	268	275	281	270	230
Legal	265	267	271	262	249	247	242	242	248	255	269	261	251
Arts/Creative	227	222	184	175	179	184	184	187	185	188	191	191	182

By Local Market

	2019											2020	
	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
Mumbai	323	324	323	313	312	301	301	303	312	320	329	336	305
Bangalore	365	362	359	338	354	347	344	347	350	354	369	385	361
Delhi-NCR	247	275	250	240	242	239	237	240	240	248	251	251	233
Hyderabad	272	274	278	271	276	273	274	280	281	281	293	304	283
Chennai	252	270	249	239	251	245	245	245	247	251	251	261	239
Pune	299	306	299	294	304	299	304	295	297	309	317	329	302
Kolkata	350	347	349	342	374	388	390	387	403	412	425	417	387
Ahmedabad	341	346	342	337	369	376	377	391	385	401	413	415	385
Chandigarh	352	346	343	320	342	344	330	342	337	346	372	374	354
Kochi	272	264	258	256	262	263	268	275	275	280	290	305	279
Baroda	246	253	248	252	265	263	252	256	257	298	323	311	280
Coimbatore	301	303	301	304	315	293	304	291	303	315	311	308	294
Jaipur	331	336	315	316	321	312	308	316	317	317	329	318	291

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.