

---

---

## **TEAMLEASE EMPLOYMENT OUTLOOK SURVEY**

Quarter –**XIII** (Jan – Mar 2010)

---

---

### **Synovate India Private Limited**

2nd Floor, AML Centre 1, Off. Mahakali Caves Road, Andheri (East), Mumbai – 400 093

Tel: + 91 22 4091 8000 – 483 Fax: + 91 22 4091 8001 Web: [www.synovate.com](http://www.synovate.com)

<b>INDEX</b>	<b>Page</b>
I. Background	2
Key Findings	3
II. Objective	4
III. Methodology	4
Sample Design	4
Sample Size	5
Respondent Selection	5
Data Collection	5
Questionnaire Design	6
Fieldwork	6
IV. Indices Used	7
Quarter Comparison Sheet	8
V. Employment Outlook	16
VI. Business Outlook	20
VII. Employment Scenario	24
Hiring across Geographical Spread	24
Hiring across Managerial Level	25
Hiring across Functions	26
Attrition Rate	27
Cross Industry Movements	28
VIII. Appendix	30
Sample Profile	30
Reason for Job shifting	31

## **I. BACKGROUND**

To share the right picture on the Employment scene with policy makers and the human resources community, TeamLease continuously conducts regular surveys on quarterly basis, thus providing for a better planning and management of country's human capital. The survey reports are available for the quarters of October-December 2006, January-March 2007, April-June 2007, July-September 2007, October-December 2007, January-March 2008, April-June 2008, July-September 2008, October- December 2008, January-March 2009, April-June 2009 ,July-Sept 2009 and Oct-Dec 09 would be made available for the subsequent quarter of Jan-Mar 2010 on [www.teamlease.com](http://www.teamlease.com) .

The study covers India's organized sector providing adequate representation across various verticals of Manufacturing (Mfg) & Engineering (Eng), Financial Services (Fns), IT, ITES, Infrastructure (Infra), Retail, Media & FMCG (RMF), Telecom, Health care (Health) & Pharma (Phar) . The survey focuses on employment growth potential and hiring forecasts, for the next three months and provides an overview of hiring pattern with relation to location and company profile.

It goes further to explore hiring requirements by management levels, function and age group and captures the responses of HR Heads, CEOs and the Senior Management professionals responsible for hiring decisions in their respective organizations.

## Key Findings

- ★ Employment Outlook Index for Quarter –XIII (Jan-Mar 2010) stands at 47 index points, which is 1% higher than the previous quarter. Among the sectors covered, there is an increase in index points of all sectors except Financial Services, Health care/Hospitality and Pharma. Infrastructure (with 69 points) has the highest index points followed by IT (with 59 points).
- ★ Among cities, there is an increase in Employment Outlook index points of all cities except Mumbai, Delhi, Hyderabad and Ahmedabad. The Employment Outlook Index points of Pune increased the most (by 50 points) while it dropped the most for Delhi (by 24 points).
- ★ In Quarter – XIII, the Net Business Outlook Index have shown an **increase** of 41 index points. The index points of most sectors are on the increase except Telecom and Pharma. The ITES sector increased the most (by 31 points).
- ★ Among cities, there is an **increase** in Business Outlook index points of all cities except Mumbai, Delhi and Hyderabad. The Business Outlook Index points of Pune increased the most (by 63 points).
- ★ It is observed that there is a **decrease** in the intention to hire at all Managerial levels.
- ★ It is observed that there is an **increase** in the intention to hire in Marketing and Customer Service functions.
- ★ During the past 3 months as well as the last 1 year, Hyderabad, Kolkata and Delhi had the highest attrition rates compared to other cities. Ahmedabad had the lowest attrition rate in both last 3 months as well as in last 1 year.

## **II. OBJECTIVE**

The objective of the proposed survey is to track and understand the hiring expectations of the private sector in India; this will further enable the HR sourcing companies to develop strategies with respect to their hiring/making skilled resources available respectively. It also helps the Corporate Houses to understand the employment trend in the present market situation in major cities.

## **III. METHODOLOGY**

The TeamLease-Employment Outlook Survey follows a rigorous, statistically validated process adhering to the highest standards in Marketing Research.

### **Sample Design**

For the purpose of sampling a combination of database, and random sampling as a technique has been used. For non-IT/ITES companies and non-financial, we have used the Kompass directory. The Kompass directory is enlisting 70% of the registered companies in the organised sector. Particularly, it provides good coverage of small, medium and large sized companies. To ensure continuity with the baseline measurement, the core random sample was drawn from this database. However to have a better understanding of the dynamics in specific industry segments such as IT and ITES companies, we supplemented the above sample with random sample of companies selected from NASSCOM in case of IT, companies registered with the website of [www.bpo.india.org](http://www.bpo.india.org) in the case of ITES and a database of financial companies registered with the Bombay Stock Exchange (BSE) in the case of financial services.

### Sample Size:

Sectors	Mum	Del	B'lore	Kol	Chn	Pun	Hyd	Ahd	Total
Manufacturing & Engineering	10	4	9	10	19	14	8	5	79
Retail, Media & FMCG	25	11	6	11	11	-	-	11	75
Financial Services	10	10	18	-	17	10	13	-	78
IT	9	9	10	-	8	5	4	-	45
ITES	15	5	7	-	5	-	-	5	37
Infrastructure	10	12	4	5	6	-	8	-	45
Telecom	20	22	12	1	4	1	-	-	60
Health Care	5	5	5	4	5	-	4	5	33
Pharma	15	5	3	5	5	-	-	20	53
<b>Total</b>	<b>119</b>	<b>83</b>	<b>74</b>	<b>36</b>	<b>80</b>	<b>30</b>	<b>37</b>	<b>46</b>	<b>505</b>

Reference: Mum: Mumbai, Del: Delhi, 'B'lore: Bangalore, Kol: Kolkata, Chn: Chennai, Pun: Pune, Hyd: Hyderabad, Ahd: Ahmedabad

### Respondent Selection

The target respondents for the study were those who were responsible for recruitment such as HR Managers etc. The database offered a contact name for each company listed. Synovate interviewers called into each of these companies and obtained the names of the appropriate individuals who were responsible for hiring decisions.

### Data Collection

The survey instrument was then administered to the target respondents using the CATI (Computer Aided Telephonic Interview) methodology. Computer software called Surveycraft™ was used for data collection as well as for data tabulation. Given the concentration of most companies and their headquarters in the top 8 major cities of Mumbai, Delhi, Bangalore, Kolkata, Chennai, Hyderabad, Pune and Ahmedabad, this study was restricted to covering only companies with a presence in these cities. A random sample was drawn from within each city with proper representation in terms of employee size.

**Questionnaire Design:**

A structured questionnaire was used for filling in responses to capture the following information areas:

- Over all business improvement (last three months and next three months)
- Over all recruitment needs (last three months and next three months)
- Recruitment trends (across age band, across geographies, across functions, across levels)
- Attrition rates
- Cross industry movement of the workforce
- Demographic information about the organization

**Fieldwork:**

A total of 505 interviews were covered during the month of Oct and Dec 2009 from the database. The database was a combination of Kompass, NASSCOM, NSE and [www.bpo.india.org](http://www.bpo.india.org). Sufficient care was taken to get an equitable representation across the industries to remove any bias or variation which might be an attribute of a particular industry.

#### **IV. INDICES USED:**

We have computed certain indices to elaborate and analyze the trends in the data. A description of those indices follows:

##### **Employment Outlook Index:**

The Employment Outlook Index is computed as the difference in the proportion of respondents who report an increase in hiring needs and those who report a decline in hiring needs over the next three months.

##### **Employment Trend Index:**

The Employment Trend Index is calculated by dividing the Current Employment Outlook Index with the baseline index and converting the same in percentages by multiplying with 100.

##### **Business Outlook Index:**

Index computed by subtracting the percentage respondents who say business in the next three months is likely to decrease from the percentage who say it will increase.

##### **Business Confidence Index:**

Business Confidence Index is computed by dividing the Current Business Outlook Index with the baseline business outlook index, and converting the same in percentages, by multiplying with 100.



## QUARTER COMPARISON SHEET

### **Net Employment Outlook:**

The 'Net Employment Outlook' is derived in Percentages as the difference in the proportion of respondents reporting an increase in hiring needs and those who report a decline in hiring needs over the next three months.

Quarter	Period	<i>(Figures in percentage)</i>			
		Increase	Decrease	No Change	Net Employment Outlook
13	Jan-Mar 2010	51	4	46	+47
12	Oct-Dec 2009	52	6	42	+46
11	Jul-Sept 2009	51	5	43	+46
10	Apr-Jun 2009	35	11	54	+24
9	Jan-Mar 2009	44	10	46	+34
8	Oct-Dec 2008	67	3	29	+64

The Quarter XIII Net Employment Outlook Index points of +47% has increased by 1% from the previous Quarter.

**Net Employment Outlook growth sector wise:**

The Net Increase/Decrease in the Employment Outlook growth sector-wise is derived by subtracting the percentage of responses of Quarter- 12 from Quarter- 13

Sectors	<i>(Figures in percentage)</i>						
	Quarter						Net Increase/ Decrease
	13	12	11	10	9	8	
<b>IT</b>	59	55	53	13	34	78	<b>+04</b>
<b>ITES</b>	47	36	33	22	53	87	<b>+11</b>
<b>Financial Services</b>	45	64	49	40	44	59	<b>-19</b>
<b>Retail, Media &amp; FMCG</b>	38	35	46	27	36	64	<b>+03</b>
<b>Infrastructure</b>	69	48	53	38	26	88	<b>+21</b>
<b>Manufacturing &amp; Engineering</b>	38	30	36	5	24	55	<b>+08</b>
<b>Telecom</b>	50	49	55	39	60	60	<b>+01</b>
<b>Health Care</b>	55	61	44	22	*	*	<b>-06</b>
<b>Pharma</b>	24	32	42	12	*	*	<b>-08</b>

\* Not covered in previous quarters

**Net Employment Outlook Growth City wise:**

The Net Increase/Decrease in the Employment Outlook growth city-wise is derived by subtracting the percentage of responses of Quarter - 12 from Quarter – 13

City	<i>(Figures in percentage)</i>						
	Quarter						Net Increase/ Decrease
	13	12	11	10	9	8	
<b>Mumbai</b>	41	51	49	30	22	60	<b>-10</b>
<b>Delhi</b>	35	59	67	34	70	81	<b>-24</b>
<b>Bangalore</b>	55	41	48	39	29	62	<b>+14</b>
<b>Kolkata</b>	47	34	34	30	17	58	<b>+13</b>
<b>Chennai</b>	54	34	53	16	14	43	<b>+20</b>
<b>Pune</b>	70	20	13	-20	45	82	<b>+50</b>
<b>Hyderabad</b>	54	76	33	5	40	90	<b>-22</b>
<b>Ahmedabad</b>	37	41	25	18	16	23	<b>-04</b>

**Net Business Outlook:**

The 'Net Business Outlook' is derived in Percentages as the difference in the proportion of respondents reporting an increase in Business and those who report a decline in Business over the next three months.

Quarter	Period	<i>(Figures in percentage)</i>			
		Increase	Decrease	No Change	Net Business Outlook
13	Jan-Mar 2010	50	9	41	+41
12	Oct-Dec 2009	45	14	41	+31
11	Jul-Sept 2009	40	16	43	+24
10	Apr-Jun 2009	25	27	48	- 02
9	Jan-Mar 2009	34	28	39	+06
8	Oct-Dec 2008	66	10	23	+56

Quarter XIII Net Business Outlook Index points are 41% up by 10% compared to the previous quarter.

**Net Business Outlook growth sector wise:**

The Net Increase/Decrease in the Business Outlook growth sector wise is derived by subtracting the percentage of responses of Quarter - 12 from Quarter – 13

Sectors	<i>(Figures in percentage)</i>						
	Quarter						Net Increase/ Decrease
	13	12	11	10	9	8	
IT	48	44	24	-17	-8	53	<b>+04</b>
ITES	44	13	9	9	35	57	<b>+31</b>
Financial Services	45	31	35	-12	-24	31	<b>+14</b>
Retail, Media & FMCG	22	14	21	3	7	61	<b>+08</b>
Infrastructure	55	35	30	10	-41	91	<b>+20</b>
Manufacturing & Engineering	41	25	19	-12	15	57	<b>+16</b>
Telecom	32	32	38	22	44	60	<b>00</b>
Health Care	64	40	12	-11	*	*	<b>+24</b>
Pharma	27	33	22	6	*	*	<b>-06</b>

\* Not covered in previous quarters

**Net Business Outlook growth city wise:**

The Net Increase/Decrease in the Business Outlook growth city wise is derived by subtracting the percentage of responses of Quarter - 12 from Quarter - 13

City	<i>(Figures in percentage)</i>						Net Increase/ Decrease
	Quarter						
	13	12	11	10	9	8	
<b>Mumbai</b>	21	25	16	-15	-37	50	<b>-04</b>
<b>Delhi</b>	36	40	43	10	28	79	<b>-04</b>
<b>Bangalore</b>	49	22	33	15	7	36	<b>+27</b>
<b>Kolkata</b>	58	39	40	-3	-6	63	<b>+19</b>
<b>Chennai</b>	60	30	30	1	3	30	<b>+30</b>
<b>Pune</b>	77	14	7	-40	57	88	<b>+63</b>
<b>Hyderabad</b>	35	68	13	10	16	43	<b>-33</b>
<b>Ahmedabad</b>	31	16	0	-7	0	22	<b>+15</b>

**Employment scenario:**

The Net Increase/Decrease in the Employment scenario is derived by subtracting the percentage of responses of Quarter – 12 from Quarter – 13

City	<i>(Figures in percentage)</i>						
	Quarter						Net Increase/ Decrease
	13	12	11	10	9	8	
<b>Metro</b>	87	82	89	90	75	77	<b>+05</b>
<b>Class - I</b>	15	17	14	13	24	23	<b>-02</b>
<b>Class - II</b>	2	4	4	2	13	8	<b>-02</b>
<b>Class – III</b>	1	2	3	0	5	5	<b>-01</b>
<b>Rural</b>	2	2	2	1	2	1	<b>00</b>

**Managerial level hiring:**

The Net Increase/Decrease in the Intention to hire across Managerial Levels is derived by subtracting the percentage of responses of Quarter - 12 from Quarter – 13

Level	<i>(Figures in percentage)</i>						
	Quarter						Net Increase/ Decrease
	13	12	11	10	9	8	
<b>Entry Level</b>	26	28	24	39	40	52	<b>-02</b>
<b>Junior Level</b>	40	45	42	44	53	57	<b>-05</b>
<b>Middle Level</b>	40	41	32	38	50	45	<b>-01</b>
<b>Senior Level</b>	20	20	22	17	26	24	<b>00</b>
<b>Not Hiring</b>	26	23	25	-	-	-	<b>+03</b>

**Intention to hire across functions:**

The Net Increase/Decrease in the Intention to hire across Functions is derived by subtracting the percentage of responses of Quarter - 12 from Quarter – 13

Sectors	<i>(Figures in percentage)</i>						Net Increase/ Decrease
	Quarter						
	13	12	11	10	9	8	
<b>Marketing</b>	46	39	36	41	38	46	<b>+07</b>
<b>System / IT</b>	19	24	23	19	19	21	<b>-05</b>
<b>Production</b>	26	28	29	25	41	53	<b>-02</b>
<b>Finance</b>	16	20	16	12	13	19	<b>-04</b>
<b>Administration</b>	7	12	12	9	14	22	<b>-05</b>
<b>HR</b>	3	4	9	4	3	8	<b>-01</b>
<b>Customer Service</b>	25	20	27	25	15	20	<b>+05</b>
<b>Other</b>	12	12	6	12	0	1	<b>00</b>
<b>Not hiring</b>	-	-	7	-	-	-	<b>-</b>



## V. EMPLOYMENT OUTLOOK:

The **Employment Outlook Index**, which is the difference in proportion of respondents who report an increase in hiring needs and those who report decline in hiring needs over the next three months, is at 47.

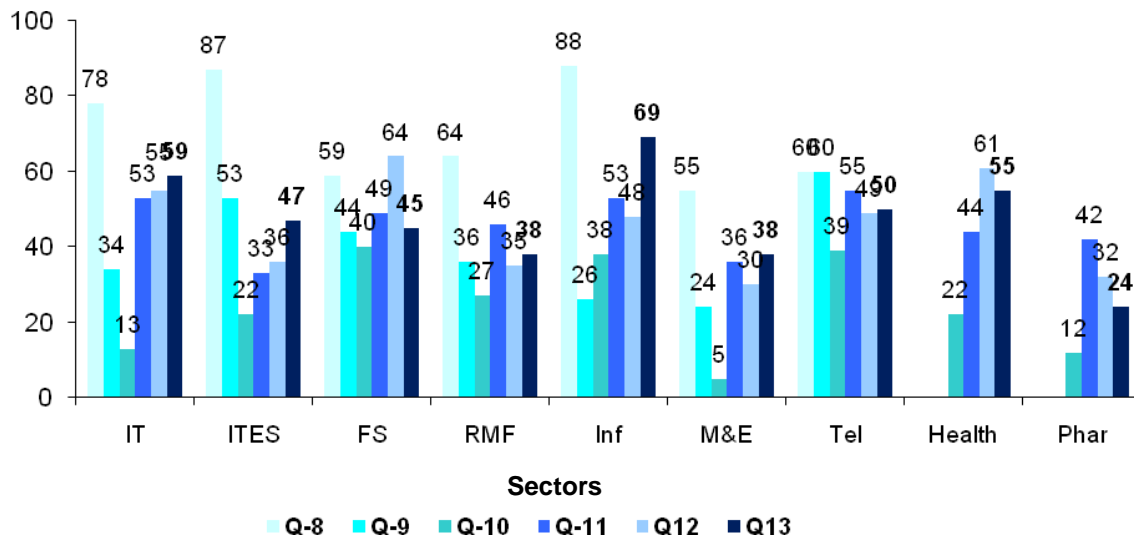
<b>Employment Outlook Index</b>	Quarter-13: Jan 2010	47
	Quarter-12: Oct 2009	46
	Quarter-11: July 2009	46
	Quarter-10: Apr 2009	24
	Quarter-9: Jan 2009	34
	Quarter-8: Oct 2008	64
	Quarter-1: Jan 2007	81

When compared to the previous quarter of Oct- December 2009 (Quarter – 12) the Employment Outlook Index has increased by 1% only. .

The **Employment Trend Index** which is calculated by dividing the Current Employment Outlook Index with the baseline index and converting the same in percentages by multiplying with 100 is at 58.

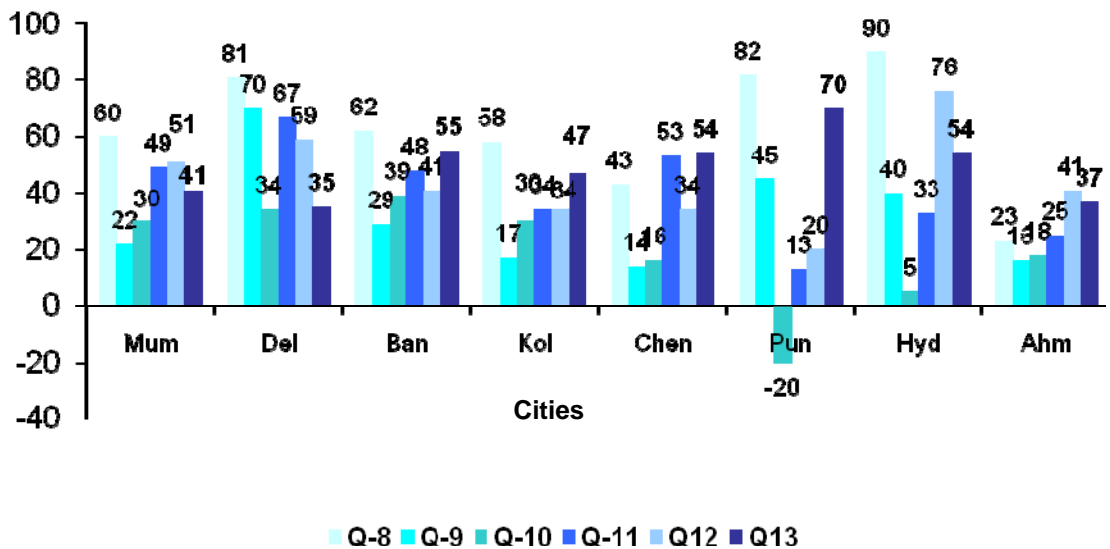
<b>Employment Trend Index</b>	Quarter-13: Jan 2010	58
	Quarter-12: Oct 2009	57
	Quarter-11: July 2009	57
	Quarter-10: Apr 2009	30
	Quarter-9: Jan 2009	42
	Quarter-8: Oct 2008	79

**Employment Outlook Index – Sector Wise:**



In Quarter–13, there has been an increase in Employment Outlook Index points across all sectors, except Financial Services; Healthcare/Hospitality and Pharma. Increase has been the maximum for the Infrastructure while least for the Telecom sector.

**Employment Outlook Index – City Wise:**



In Quarter- 13, the index points for all cities improved compared to Quarter-12, except Mumbai, Delhi, Hyderabad and Ahmedabad. Index for Pune increased the most while that of Delhi decreased the most.

### Employment Growth across Cities:

City	Qtr	Total	Sector								
			IT	ITES	FS	RMF	Inf	M&E	Tel	Health	Phar
Mumbai	13	42	9	4	5	2	8	2	7	4	1
	12	51	8	5	8	3	9	2	5	7	5
	11	49	4	4	4	4	7	8	7	4	7
	10	30	5	4	4	1	10	0	3	2	1
	9	22	5	2	12	-1	1	2	1	*	*
	8	60	10	5	17	11	5	9	2	*	*
Delhi	13	33	9	2	1	4	6	5	2	4	0
	12	59	10	7	9	5	6	6	7	7	2
	11	67	4	4	7	9	9	6	8	9	11
	10	34	3	2	11	16	4	13	10	-13	-12
	9	70	8	2	7	23	3	11	16	-	-
	8	81	12	5	7	23	10	12	12	-	-
Bangalore	13	56	5	5	11	2	3	6	8	9	7
	12	41	4	0	9	6	0	5	5	4	7
	11	48	7	4	7	5	0	4	4	11	7
	10	39	6	8	2	6	0	3	4	7	3
	9	29	6	16	-	6	2	-	-	*	*
	8	62	20	16	-	6	6	12	2	*	*
Kolkata	13	46	0	0	7	0	20	12	0	-5	12
	12	34	0	0	12	0	9	4	0	4	5
	11	34	0	0	12	0	9	4	0	5	4
	10	30	0	0	7	0	4	4	0	8	7
	9	17	-	-	2	3	2	11	-	*	*
	8	58	-	-	6	8	6	38	-	*	*

City	Qtr	Total	Sector								
			IT	ITES	FS	RMF	Inf	M&E	Tel	Health	Phar
Chennai	13	54	3	5	8	8	7	4	7	10	2
	12	34	5	3	8	-3	6	-1	3	11	3
	11	53	6	8	9	7	7	7	4	5	0
	10	16	1	1	3	0	2	-1	2	5	3
	9	14	5	-	-2	2	-	5	4	*	*
	8	43	9	-	4	5	-	21	4	*	*
Pune	13	69	31	25	0	0	0	13	0	0	0
	12	20	8	10	0	0	0	2	0	0	0
	11	13	11	0	0	0	0	2	0	0	0
	10	-20	-10	-5	0	0	0	-5	0	0	0
	9	45	2	-	-	4	-	39	-	*	*
	8	82	29	-	-	29	-	24	-	*	*
Hyderabad	13	54	8	14	0	0	16	2	0	14	0
	12	76	18	20	0	0	12	14	0	11	0
	11	33	26	0	0	0	7	7	0	-7	0
	10	5	-1	3	0	0	3	-3	0	3	0
	9	40	7	10	17	3	3	-	-	*	*
	8	90	17	27	17	13	17	-	-	*	*
Ahmedabad	13	37	0	0	5	14	0	3	0	10	5
	12	41	0	0	8	13	0	3	0	13	3
	11	25	0	0	4	8	0	0	0	8	5
	10	18	0	0	7	0	0	0	0	7	4
	9	16	-3	-	11	-	-	8	-	*	*
	8	23	3	-	6	-	-	14	-	*	*

[Reference: IT – Information Technology; ITES – IT Enabled Services; FS – Financial Services; RMF – Retail, Media & FMCG; Inf – Infrastructure; M&E – Manufacturing & Engineering; Tel – Telecom; Health Care- Health; Pharma-Phar]

In Quarter – 13, Financial Services is the major contributor of employment growth in Bangalore. Infrastructure, Manufacturing & Engineering and Pharma are major contributors in Kolkata. While IT & ITES is the major contributor of employment growth in Pune. Infrastructure, ITES and Health care are the major contributors for Hyderabad's growth. Retail, Media & FMCG and Health Care are the major contributors for Ahmadabad's growth.

## VI. BUSINESS OUTLOOK:

The **Business Outlook Index**, computed by subtracting the percentage respondents who say business in the next three months is likely to increase from the percentages who say it will decrease, stands at **41**.

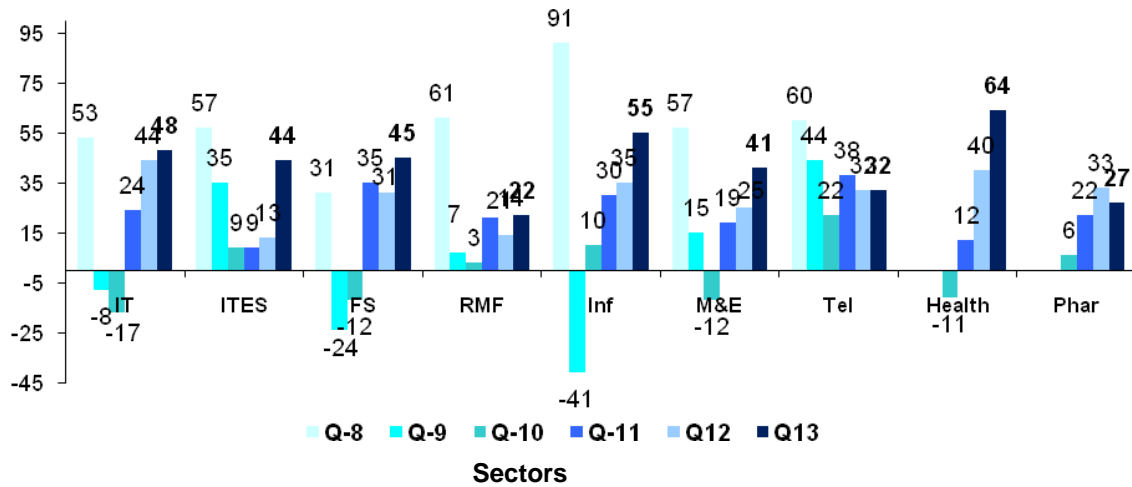
<b>Business Outlook Index</b>	Quarter-13: Jan 2010	41
	Quarter-12: Sept 2009	31
	Quarter-11: July 2009	24
	Quarter-10: April 2009	-02
	Quarter-9: January 2009	06
	Quarter-8: October 2008	56
	Quarter-1: January 2007	91

Business Outlook Index Point in Quarter – 13 as compared to the previous quarter has increased by 10 Index points.

The **Business Confidence Index** computed by dividing the Current Business Outlook Index with the baseline business outlook index, and converting the same in percentages, by multiplying with 100 stands at **45**.

<b>Business Confidence Index</b>	Quarter-13: Jan 2010	45
	Quarter-12: Sept 2009	34
	Quarter-11: July 2009	26
	Quarter-10: Apr 2009	-02
	Quarter-9: January 2009	07
	Quarter-8: October 2008	62

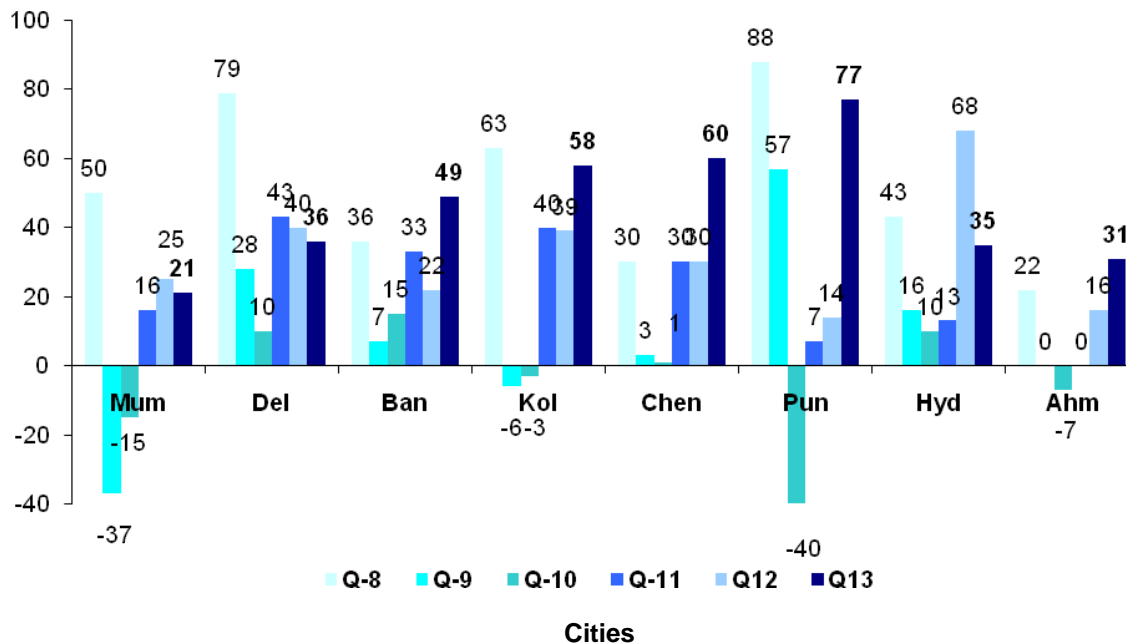
**Business Outlook Index – Sector Wise:**



In Quarter – 13, the Business Outlook Index for all the sectors have been improved except Telecom and Pharma.

The Business Outlook index increased the most for ITES (31 points) followed by Healthcare (24 points).

**Business Outlook Index – City Wise:**



In Quarter – 13, all cities show a positive Business Outlook Index except Mumbai, Delhi and Hyderabad.

The Business Outlook Index increased the most for Pune, followed by Chennai.

**Sector Growth across Cities:**

City	Qtr	Total	Sector								
			IT	ITES	FS	RMF	Inf	M&E	Tel	Health	Phar
Mumbai	13	21	2	1	2	-2	7	4	1	4	2
	12	25	5	-1	4	-3	5	2	1	6	5
	11	16	-1	0	4	-1	1	4	1	6	2
	10	-15	-5	3	-2	-4	8	-7	-2	-5	-1
	9	-37	-5	-2	-10	-14	-2	-4	-	*	*
	8	50	9	4	6	10	5	10	5	*	*
Delhi	13	37	6	2	3	8	6	5	1	6	0
	12	40	6	5	1	6	2	5	6	6	2
	11	43	3	3	6	5	9	5	8	-3	8
	10	10	0	0	-10	34	-13	20	32	-40	-13
	9	28	4	1	-3	14	-6	6	12	*	*
	8	79	12	5	4	21	11	14	12	*	*
Bangalore	13	48	3	3	10	1	5	3	8	8	7
	12	22	2	-4	4	9	0	1	4	-2	7
	11	33	4	1	7	3	0	2	4	7	4
	10	16	2	6	-3	4	0	0	1	4	2
	9	08	-8	16	-	4	-2	-2	-	*	*
	8	36	4	10	-	4	6	8	4	*	*
Kolkata	13	58	0	0	13	0	20	10	0	15	0
	12	39	0	0	13	0	8	4	0	5	8
	11	40	0	0	14	0	8	4	0	5	8
	10	-3	0	0	9	0	-4	-4	0	4	-8
	9	-6	-	-	-3	2	-5	-	-	*	*
	8	63	-	-	3	11	8	41	-	*	*

City	Qtr	Total	Sector								
			IT	ITES	FS	RMF	Inf	M&E	Tel	Health	Phar
Chennai	13	61	6	8	11	9	7	5	8	9	-2
	12	30	4	4	3	-2	6	2	2	6	4
	11	30	4	1	2	7	0	4	8	2	2
	10	1	-1	0	0	0	-1	0	1	1	1
	9	04	-	-	-2	4	-	-2	4	*	*
	8	30	9	-	2	7	-	14	-2	*	*
Pune	13	77	32	26	0	0	0	19	0	0	0
	12	14	6	6	0	0	0	2	0	0	0
	11	7	4	0	0	0	0	3	0	0	0
	10	-40	-21	-11	0	0	0	-8	0	0	0
	9	57	4	-	-	4	-	50	-	*	*
	8	88	32	-	-	40	-	16	-	*	*
Hyderabad	13	34	6	16	0	0	0	4	0	8	0
	12	68	16	14	0	0	4	19	0	14	0
	11	13	33	0	0	0	20	0	0	-40	0
	10	10	1	8	0	0	1	0	0	0	0
	9	17	-3	10	7	-	3	-	-	*	*
	8	43	-6	10	13	13	13	-	-	*	*
Ahmedabad	13	32	0	0	0	9	0	0	0	13	10
	12	16	0	0	0	3	0	7	0	3	3
	11	0	0	0	0	0	0	0	0	0	0
	10	-7	0	0	1	-2	0	-3	0	-3	0
	9	0	-	-	-	-	-	-	-	*	*
	8	22	-	-	6	-	-	16	-	*	*

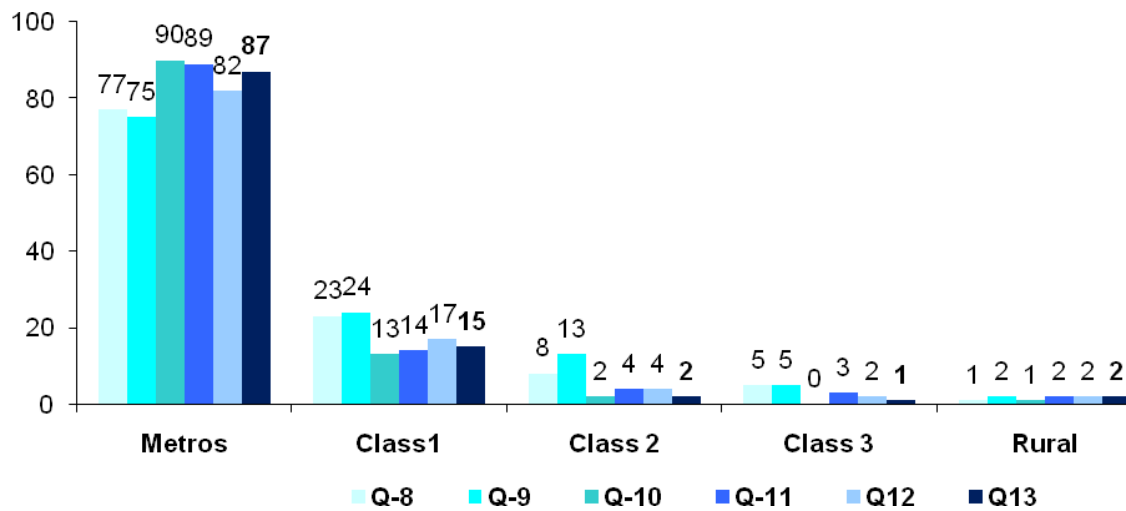
[Reference: IT – IT; ITES – ITES; FS – Financial Services; RMF – Retail, Media & FMCG; Inf – Infrastructure; M&E – Manufacturing & Engineering; Tel – Telecom; Health Care- Health; Pharma-Phar ]

In the Quarter – 13, Infrastructure contributes the most for growth in Kolkata. IT, ITES, M&E contributes the most for growth in Pune.



## VII. EMPLOYMENT SCENARIO:

### Hiring across Geographical Spread



*[Metro cities - having population of 40 lakhs & above: Mumbai, Delhi, Kolkata, Chennai & Bangalore*

*Class-I towns - having population of 20- 40 lakhs: Hyderabad, Ahmedabad & Pune*

*Class-II towns - having population of 10- 20 lakhs*

*Class-III towns - having population less than 10 lakhs but more than 0.5 lakhs*

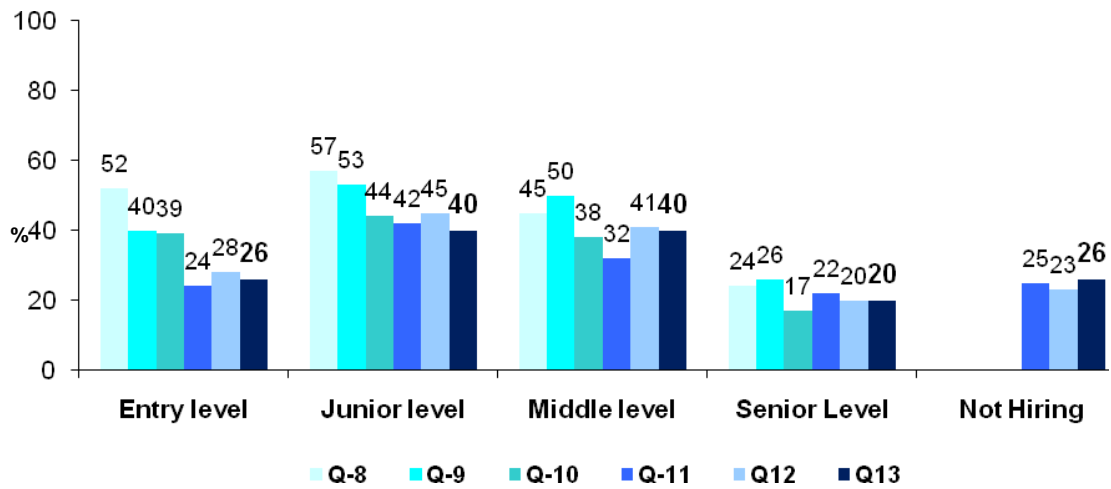
*Rural: Towns with population less than 0.5 lakhs]*

Respondents were asked to evaluate their intention to hire from Metro, Class -I, Class II, Class III, cities and Rural areas.

Compared to the previous quarter, there is an upward hiring trend in Metros, and downward trend in Class-1, 2 & 3 cities. Hiring intention in rural areas is steady.

## Hiring across Managerial Level:

Intention to hire across all levels on the decline



*Entry Level:* No Experience

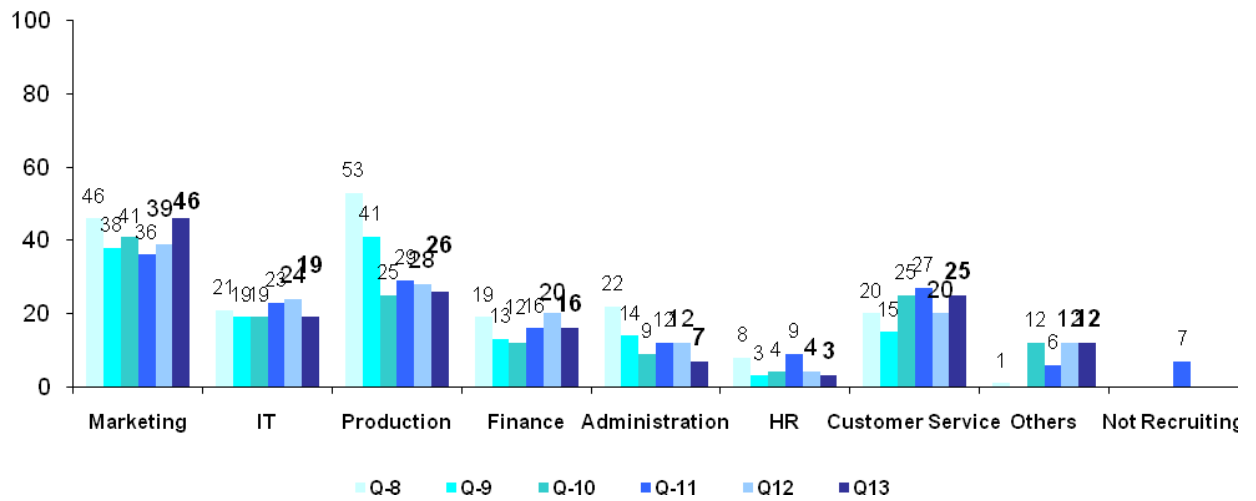
*Jr. Level:* 1-3 years experience

*Middle Level:* 3-7 years experience

*Sr. Level:* More than 7 years experience

It has been observed that there is a decrease in recruitment at all the levels except at the Senior level in Quarter-13, which is on par with Quarter-12. Whereas, 'not-to-hire' intention has been increased

### Hiring across functions:



\* Others include Technical, Sales, etc.

In Quarter–13, the recruitment has increased for Marketing, and customer service.

	Mum	Del	Blr	Kol	Chn	Pun	Hyd	Ahd	Responses	
Samples Targeted	119	83	74	36	80	30	37	46	No's	%
Marketing	36	57	33	17	28	13	10	36	230	29.87
Production	27	6	16	7	28	16	7	22	129	16.75
Finance	26	14	6	12	8	6	1	8	81	10.51
Customer Service	30	28	19	7	16	8	8	10	126	16.36
IT	10	20	20	2	17	13	12	0	94	12.20
Administration	7	8	5	3	3	6	1	2	35	4.54
HR	4	0	6	3	1	1	0	1	16	2.07
Others	26	10	8	5	4	0	6	0	59	7.66
<b>Total</b>	<b>166</b>	<b>143</b>	<b>113</b>	<b>56</b>	<b>105</b>	<b>63</b>	<b>45</b>	<b>79</b>	<b>770</b>	<b>100%</b>

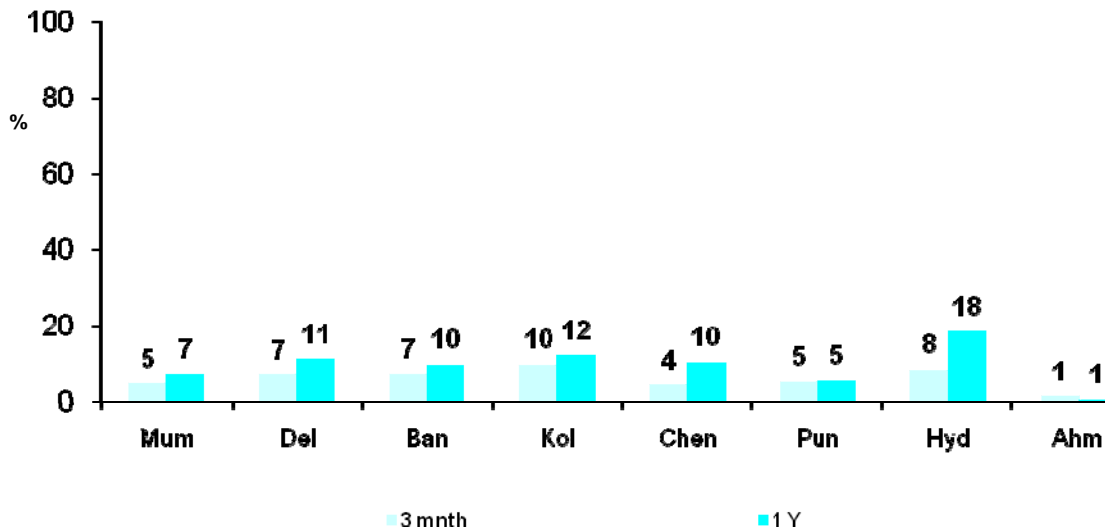
Reference: Mum: Mumbai, Del: Delhi, 'Blr: Bangalore, Kol: Kolkata, Chn: Chennai,

Pun: Pune, Hyd: Hyderabad, Ahd: Ahmedabad

At the time of study the survey instrument was administered to target respondents and there were multiple responses in terms of hiring across various functions

Note: Against a sample of 505, the number of responses recorded was 770 for Quarter XIII.

### Attrition rate city-wise:

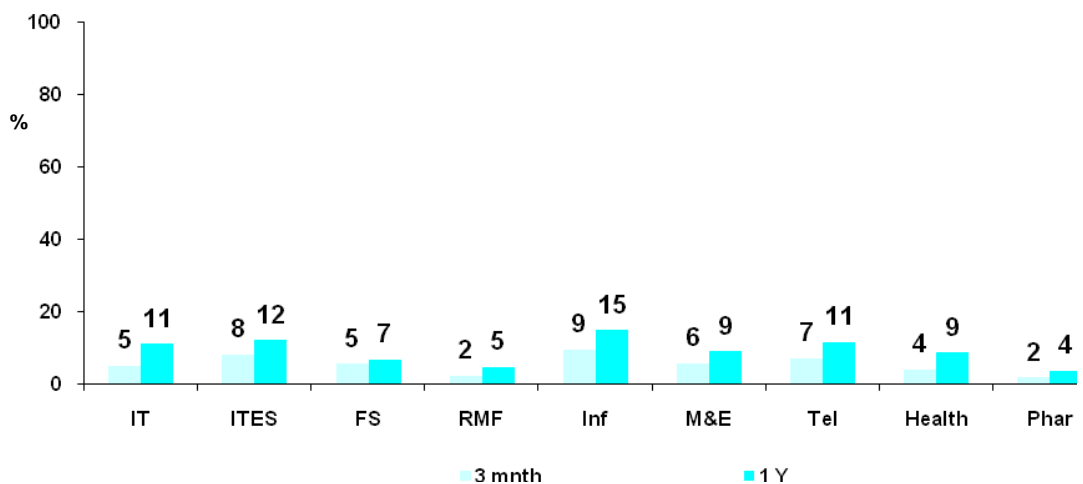


During the past three months, Kolkata, Hyderabad, Delhi and Bangalore cities were having the highest attrition rates at 10%, 8%, 7% and 7% respectively; while the other cities were having comparatively lower attrition rates.

During the past one year, Hyderabad, Kolkata, and Delhi cities were having the highest attrition rates at 18%, 12%, and 11% respectively; while the other cities were having comparatively lower attrition rates (10% and lower).

Ahmedabad has the lowest attrition rate in last 3 months as well as in the last 1 year.

### Attrition rate by sector-wise:



During the past three months Infrastructure sector was having the highest attrition rates at 9%; while the other sectors were having comparatively lower attrition rates.

During the past year, Infrastructure, ITES, Telecom and IT sectors were having the highest attrition rates at 15%, 12%, 11% and 11% respectively; while the other sectors were having comparatively lower attrition rates (10% and lower).

### Cross Industry Movements:

#### Inbound Movement

Sector		Sector moving in (in percentage)								
		M&E	FS	IT	ITES	RMF	INF	TEL	Health	Phar
Sector originating	M&E	61	2	2	2	5	8	4	24	53
	FS	1	62	1	0	3	2	4	0	6
	IT	9	1	88	23	0	2	7	3	2
	ITES	3	3	8	73	3	2	10	3	0
	RMF	6	13	1	0	42	3	9	11	29
	INF	3	1	0	0	35	54	5	5	0
	TEL	4	0	0	0	0	0	1	0	0
	Health	0	0	0	0	0	3	0	43	0
	Pharma	0	2	0	0	0	11	1	0	0
	Others	13	15	0	2	13	15	58	10	10

[Reference: IT – IT; ITES – ITES; FS – Financial Services; RMF – Retail, Media & FMCG; Inf – Infrastructure; M&E – Manufacturing & Engineering; Tel – Telecom; Health Care- Health; Pharma-Phar, Others-Agricultural, Trading, Transport, Textile, Chemical, Service ]

In most sectors the employees were moving within the same sector. But a sizeable number of employees from Retail, Media & FMCG also moved to Pharma; and many Infrastructure employees moved to Retail, Media & FMCG sector.

## Outbound Movement

Sector		Sector originating from (in percentage)								
		M&E	FS	IT	ITES	RMF	INF	TEL	Health	Phar
Sector moving to	M&E	64	3	5	5	0	18	8	7	16
	FS	1	63	1	0	5	0	3	2	5
	IT	3	2	82	27	3	4	6	0	0
	ITES	3	5	7	64	0	2	11	0	0
	RMF	0	2	0	0	62	6	5	7	0
	INF	3	3	0	0	0	59	0	0	0
	TEL	4	1	0	3	4	2	52	0	0
	Health	1	0	0	0	0	0	0	43	0
	Pharma	2	1	1	0	0	0	0	30	37
	Others	19	20	4	2	26	10	15	10	42

[Reference: IT – IT; ITES – ITES; FS – Financial Services; RMF – Retail, Media & FMCG; Inf – Infrastructure; M&E – Manufacturing & Engineering; Tel – Telecom; Health Care- Health; Pharma – Phar; Others-Agricultural, Trading, Transport, Textile, Chemical, Service]

In most sectors the employees were moving out within the same sector

## VIII. APPENDIX

The table below gives the sample profile vis-à-vis

- Employee base (No. of Employees)
- Turnover base (Rs in Cr.)

### Sample Profile

#### Employee Base (No. of Employees)

City	< 250	250 - 500	501 - 1000	>1000	Total
Ahmedabad	45	0	0	1	46
Bangalore	60	6	4	4	74
Chennai	64	7	3	6	80
Delhi	55	24	3	1	83
Hyderabad	30	2	2	3	37
Kolkata	17	7	5	7	36
Mumbai	88	16	6	9	119
Pune	15	4	3	8	30
<b>Total</b>	<b>374</b>	<b>66</b>	<b>26</b>	<b>39</b>	<b>505</b>
<b>% on total</b>	<b>74.05</b>	<b>13.07</b>	<b>5.14</b>	<b>7.72</b>	<b>100</b>

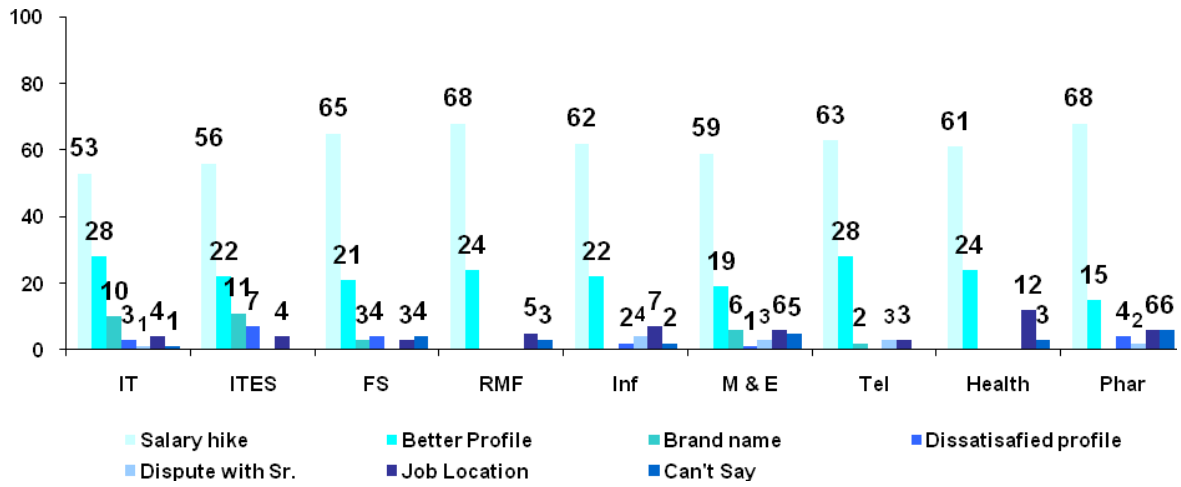
#### Turnover Base (Rs. in Cr.)

City	< 50	50 - 100	101 - 250	251 - 500	501 - 1000	>1000	Not Disclosed	TOTALS
Ahmedabad	41	4	1	0	0	0	0	46
Bangalore	42	0	0	2	1	1	28	74
Chennai	25	5	1	1	0	0	48	80
Delhi	28	4	4	1	4	0	42	83
Hyderabad	0	0	1	0	1	0	35	37
Kolkata	10	3	1	1	0	6	15	36
Mumbai	48	14	2	5	3	3	44	119
Pune	13	3	3	3	3	5	0	30
<b>Total</b>	<b>207</b>	<b>33</b>	<b>13</b>	<b>13</b>	<b>12</b>	<b>15</b>	<b>212</b>	<b>505</b>
<b>% on Total</b>	<b>40.99%</b>	<b>6.53%</b>	<b>2.57%</b>	<b>2.57%</b>	<b>2.38%</b>	<b>2.97%</b>	<b>41.98%</b>	<b>100</b>

\* Not disclosed – the turnover of the company; however they shared the rest of the information as desired in the questionnaire

## Reason's for Job shifting:

### Sector-wise



### City-wise

