# Employment Outlook Report

Comprehensive overview of the mechanics of hiring, job growth, salaries and their drivers, trends and forecasts across 8 cities and 16 sectors in India

HY1-2018-19

TeamLease®
Putting India to Work

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The TeamLease Employment Outlook Report is a forward looking tool for human resource professionals, policy and decision makers, reflecting hiring sentiment across 8 cities and 16 sectors in India. This report carries a snapshot of business hiring sentiment for the first six months of FY 2018-19 on the basis of the survey and analysis carried out during the preceding 5 months [November, 2017 – March, 2018].

The survey covers 695 small, medium and large companies across these 16 sectors, studies employment trends and attrition and gleans information on hiring sentiments. The coverage is spread across 4 geographical areas [Metros, Tier-1, Tier-2/3 and Rural], 4 hierarchical levels [Entry, Junior, Mid and Senior Levels] and 7 functional areas [Sales, Marketing, Information Technology, Engineering, Office Services, Human Resources, Blue Collar].

Tracking critical drivers that influence hiring every half year, the Employment Outlook Report is the only one of its kind seeking to deliver high impact hiring decision support to its stakeholders – Business & HR heads, Senior Management and Policy-makers in industry and the government.

**The report aims to**

- Measure trends in hiring sentiment across the country, and estimate Job Growth, by city and sector.
- Drill across geographies, business size and hierarchy to provide additional dimensions of the statistic.
- Identify the key drivers of hiring sentiment at sector-level.

*Note: The Employment Outlook and Job Growth statistics need to be read together for each sector for better understanding of the trends.*

**Reporting convention: how to interpret outlook statistics**

The Net Employment Outlook is the difference between the number of respondents who are inclined to hire and the number of respondents who are disinclined to hire, over the next 6 months of the financial year (April through September, 2018-19). The Outlook is expressed as a percentage of the total number of respondents.

For the forthcoming half year, for which the Outlook is being reported here, 96% responded positively (hire would increase), 1% responded negatively (hiring would decrease) and 3% responded saying there would not be any change in the volume of hiring, from the previous half year. The Net Employment Outlook, therefore, would be 95%.

GLOBAL TRENDS: Asia Pacific [APAC] leads global markets with a Net Employment Outlook of 62% for the April-September, 2018-19 period. Middle-east [54%], Americas [44%], Africa [43%] and Europe [39%] trail behind APAC by significant margins. Benchmarked against global markets, the employment outlook for India is ahead of APAC (global leader) by 33% and ahead of Europe (global laggard) by 54%.

INDIA: Employment Outlook improves significantly [+4%] for the April-September, 2018-19 half-year and stands at 95%. The overall positive sentiment is in alignment with the growth in GDP.

The outlook improves in 8 out of the 16 sectors, covered as part of the survey, dips in 7 and stays neutral in one for the April-September, 2018-19 period compared to October-March, 2017-18.

- Positive: KPO [+4%], Ecommerce & Tech Start-ups [+3%], Financial Services [+3%], Media & Entertainment [+3%], Retail [+2%], BPO/ITeS [+2%], FMCG/D [+2%] and Construction & Real Estate [+2%]
- Negative: Agriculture & Agrochemicals [-4%], Telecommunications [-4%], IT [-2%], Healthcare & Pharmaceuticals [-2%], Educational Services [-2%], Manufacturing, Engineering & Infrastructure [-2%] and Travel & Hospitality [-1%]
- Neutral: Power & Energy

The outlook improves in 5 out of the total 8 cities covered as part of the survey, and falls in the other 3 cities for the April-September, 2018-19 period compared to October-March, 2017-18.

- Positive: Mumbai [+4%], Delhi [+3%], Bangalore, Hyderabad, Pune [+1% each]
- Negative: Kolkata [-3%], Ahmedabad [-2%], Chennai [-1%]

All geographies** reported improved outlook for the April-September, 2018-19 period compared to October-March, 2017-18. Outlook is up by 3% each in Metro / Tier-1 and Tier-2 cities, and by 1% each in Tier-3 cities and rural areas.

***Please refer Bibliography and Definitions*

The outlook for Junior and Mid-levels of the hierarchy improve significantly [+4%], and the outlook marginally improves for Entry [+2%] and Senior [+1%] levels.

Medium-sized businesses are bullish and report a 5% improvement in outlook. The outlook improves by a significant 4% for large businesses and by 3% for small businesses.



The outlook for Blue Collar roles increases substantially [+5%], and those for Sales and Marketing [+4% each] increase significantly. IT and Engineering roles report marginal improvement [2% and 1% each] and HR and Office Services roles each report a 2% reduction in outlook.

Attrition rates dropped during October-March, 2017-18 compared to FY 2017-18, for 10 of the 16 sectors. Healthcare & Pharmaceuticals (9.49%), Power & Energy (10.16%), Information Technology (10.63%) and Manufacturing, Engineering & Infrastructure (11.26%) had the lowest levels of attrition for the October-March, 2017-18 half-year.

Top sectors (by city) in terms of employment outlook growth:

- Ahmedabad: Ecommerce & Tech Start-ups (5%) | KPO, Construction & Real Estate (4% each)
- Bangalore: Media & Entertainment (5%) | Financial Services, Ecommerce & Tech Start-ups (4% each) | Retail, BPO / ITeS, KPO (3% each)
- Chennai: FMCG/D, Power & Energy, Financial Services, Retail, Media & Entertainment, Ecommerce & Tech Start-ups (3% each)
- Delhi: Media & Entertainment, BPO / ITeS (4% each) | KPO, Construction & Real Estate, Retail (3% each)
- Hyderabad: FMCG/D, Ecommerce & Tech Start-ups, Media & Entertainment (4% each) | Financial Services, Retail, KPO (3% each)
- Kolkata: Financial Services, Ecommerce & Tech Start-ups (4% each) |Retail, KPO, FMCG/D (3% each)
- Mumbai: : Financial Services (4%) | KPO, Construction & Real Estate, Ecommerce & Tech Start-ups, FMCG/D (3% each)
- Pune: FMCG/D, Media & Entertainment (4% each) | Financial Services, Retail (3% each)

# Highlights

- Employment Outlook Trends

# Global Employment Outlook – HY-1, 2018-19

## Major global markets

| | Increase | Decrease | No Change | Net Employment Outlook |
|---|---|---|---|---|
| Africa | 58 | 15 | 27 | 43 |
| Americas | 61 | 17 | 22 | 44 |
| APAC | 74 | 12 | 14 | 62 |
| Europe | 53 | 14 | 33 | 39 |
| Middle-East | 72 | 18 | 10 | 54 |
| INDIA | 96 | 01 | 03 | 95 |

*All numbers are percentages of employers who indicated either an increase, decrease or no change in hiring over April – Septemb*

- Asia-Pacific (APAC) has the most positive net employment outlook (62%) across global markets for the April-September, 2018-19 period compared to October-March, 2017-18.
- The percentage of employers reporting an increase in hiring for the current half-year (April-September, 2018-19) compared to the previous half-year (October-March, 2017-18) is the highest for APAC (74%).
- The percentage of employers reporting a decrease is the lowest for APAC (12%) as well, for the April-September, 2018-19 period compared to October-March, 2017-18.
- Employment outlook for India (95%) is substantially higher than the outlook for all the regions for the April-September, 2018-19 period.
- India has a far higher percentage of employers (96%) who report an increase in their hiring volume for this half-year, compared with the five global markets.

*Data Source: Global Outlook - World Employment and Social Outlook: Trends 2018, ILO; India Outlook – TeamLease survey, Nov, 2017 – Mar, 2018*

*TeamLease survey, Nov, 2017 – Mar, 2018*

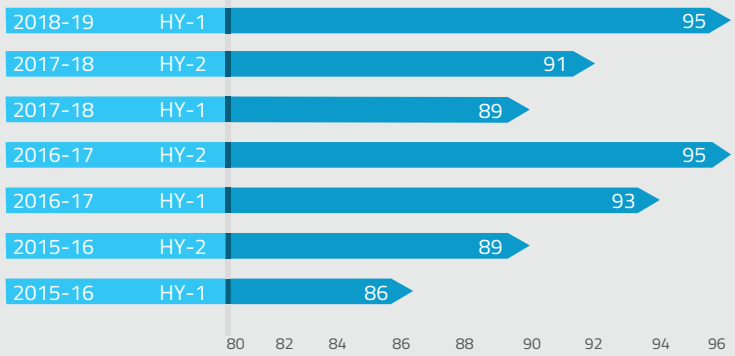
# Global Employment Outlook – HY-1, 2018-19

## Current HY in historical perspective

| | Increase | Decrease | No Change | Net Employment Outlook |
|---|---|---|---|---|
| Oct – Mar, 2015-16 | 93 | 04 | 03 | 89 |
| Apr – Sep, 2016-17 | 94 | 01 | 05 | 93 |
| Oct – Mar, 2016-17 | 96 | 01 | 03 | 95 |
| Apr – Sep, 2017-18 | 93 | 04 | 03 | 89 |
| Oct – Mar, 2017-18 | 92 | 01 | 07 | 91 |
| Apr – Sep, 2018-19 | **96** | **01** | **03** | **95** |

| Quarter | GDP Growth (%) |
|---|---|
| Q4, 2017-18 | 7.7% |
| Q3, 2017-18 | 7.0% |
| Q2, 2017-18 | 6.5% |
| Q1, 2017-18 | 5.7% |
| Q4, 2016-17 | 6.1% |
| Q3, 2016-17 | 6.8% |
| Q2, 2016-17 | 7.6% |
| Q1, 2016-17 | 8.1% |

### Employment Outlook- Over the Years




- There is an appreciable increase of 4% in the Net Employment Outlook for April-September, 2018-19 compared to the October-March, 2017-18 period.
- With the GDP for Q4, 2017-18 touching 7.7% there is a significant improvement in the overall hiring sentiment.
- This half-year continues on the path of a steady upward trend of the past five half-years (exception: April-September, 2017-18).
- Sentiment improves across 5 of the 8 cities surveyed, while 8 sectors report improved sentiment, 7 report dipping sentiments, and one sector is neutral, for the April-September, 2018-19 period.
- The revival of Construction & Real Estate, post-Demonetization, improves sentiment in the sector by 2%.

*The report is based on the analysis of surveys carried out with employers across India. Respondents from 695 small, medium and large businesses across 8 cities and 16 sectors have been surveyed for this edition of the report. All findings are reported as percentages of total respondents at the specific levels of analysis.*

*TeamLease survey, Nov, 2017 – Mar, 2018*

# Employment Outlook Trends – HY-1, 2018-19

## by Geography**

| METRO & TIER-1** | Increase | Decrease | No Change | Net Employment Outlook |
|---|---|---|---|---|
| Oct – Mar, 2017-18 | 97 | 01 | 02 | 96 |
| Apr – Sep, 2018-19 | 99 | 00 | 01 | 99 |
| **TIER-2**** | | | | |
| Oct – Mar, 2017-18 | 24 | 05 | 71 | 19 |
| Apr – Sep, 2018-19 | 27 | 05 | 68 | 22 |
| **TIER-3**** | | | | |
| Oct – Mar, 2017-18 | 09 | 05 | 86 | 04 |
| Apr – Sep, 2018-19 | 10 | 05 | 85 | 05 |
| **RURAL**** | | | | |
| Oct – Mar, 2017-18 | 02 | 02 | 96 | 00 |
| Apr – Sep, 2018-19 | 02 | 01 | 97 | 01 |

*Geographical areas are locations where hiring takes place **

*** Please refer Bibliography and Definitions*

The outlook for the current half-year has substantially improved over the previous half-year, for Metro, Tier-1 and Tier-2 cities. Tier-3 cities and Rural geographies see a marginal improvement in outlook.

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# Employment Outlook Trends – HY-1, 2018-19

## by Business Size**

| | | Increase | Decrease | No Change | Net Employment Outlook |
|---|---|---|---|---|---|
| SMALL | Oct – Mar, 2017-18 | 67 | 10 | 23 | 57 |
| | Apr – Sep, 2018-19 | 69 | 09 | 22 | 60 |
| MEDUIM | Oct – Mar, 2017-18 | 84 | 10 | 06 | 74 |
| | Apr – Sep, 2018-19 | 88 | 09 | 03 | 79 |
| LARGE | Oct – Mar, 2017-18 | 92 | 03 | 05 | 89 |
| | Apr – Sep, 2018-19 | 94 | 02 | 04 | 92 |

***Respondents categorized as Small (less than 500 employees), Medium (500 to 5,000 employees) and Large (greater than 5,000 employees)*

Medium and Large businesses display significantly higher levels of optimism (+5% and +4% respectively) for the April-September, 2018-19 half-year as compared to the previous half-year, while there is cautious optimism amongst Small businesses (+3%).

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# Employment Outlook Trends – HY-1, 2018-19

## by Hierarchy**

| | | Increase | Decrease | No Change | Net Employment Outlook |
|---|---|---|---|---|---|
| ENTRY LEVEL** | Oct – Mar, 2017-18 | 63 | 09 | 28 | 54 |
| | Apr – Sep, 2018-19 | 64 | 08 | 28 | 56 |
| JUNIOR LEVEL** | Oct – Mar, 2017-18 | 78 | 08 | 14 | 70 |
| | Apr – Sep, 2018-19 | 82 | 08 | 10 | 74 |
| MID-LEVEL** | Oct – Mar, 2017-18 | 44 | 10 | 46 | 34 |
| | Apr – Sep, 2018-19 | 47 | 09 | 44 | 38 |
| SENIOR LEVEL** | Oct – Mar, 2017-18 | 46 | 01 | 53 | 45 |
| | Apr – Sep, 2018-19 | 46 | 00 | 54 | 46 |

***The organizational level at which employers plan to hire*
***Please refer Bibliography and Definitions*

Junior and Mid-level hiring is set to improve substantially, with an increase in the proportion of employers wanting to hire during the current half-year (+4% each). There is a modest improvement in outlook for the Entry level (+2%).

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*TeamLease survey, Nov, 2017 – Mar, 2018*

# Employment Outlook Trends – HY-1, 2018-19

## by Functional Area**

| | | Increase | Decrease | No Change | Net Employment Outlook |
|---|---|---|---|---|---|
| SALES | Oct – Mar, 2017-18 | 92 | 02 | 06 | 90 |
| | Apr – Sep, 2018-19 | 95 | 01 | 04 | 94 |
| MARKETING | Oct – Mar, 2017-18 | 80 | 10 | 10 | 70 |
| | Apr – Sep, 2018-19 | 82 | 08 | 10 | 74 |
| INFORMATION TECHNOLOGY | Oct – Mar, 2017-18 | 94 | 04 | 02 | 90 |
| | Apr – Sep, 2018-19 | 95 | 03 | 02 | 92 |
| ENGINEERING | Oct – Mar, 2017-18 | 93 | 02 | 05 | 91 |
| | Apr – Sep, 2018-19 | 93 | 01 | 06 | 92 |
| OFFICE SERVICES | Oct – Mar, 2017-18 | 22 | 09 | 69 | 13 |
| | Apr – Sep, 2018-19 | 22 | 11 | 67 | 11 |

| | | Increase | Decrease | No Change | Net Employ-ment Outlook |
|---|---|---|---|---|---|
| HUMAN RESOURCES | Oct – Mar, 2017-18 | 66 | 18 | 16 | 48 |
| | Apr – Sep, 2018-19 | 65 | 19 | 16 | 46 |
| BLUE COLLAR** | Oct – Mar, 2017-18 | 85 | 01 | 14 | 84 |
| | Apr – Sep, 2018-19 | 89 | 00 | 11 | 89 |

**The functional areas in organizations for which employers plan to hire*

***Please refer Bibliography and Definitions*

> Sales, Marketing and Blue Collar hiring will find favour during the current half-year, with appreciable improvements in their respective levels of employment outlook (+4%, +4% and +5%). Engineering – a consistent high performer over the past – has the lowest level of outlook this half-year (+1%).

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# Sector and City outlook trends

- Leaders and Laggards | Job Market Sweet Spots

# Employment Outlook Trends – HY-1, 2018-19

## by Sector**

LEADERS

| Sectors | Apr-Sep, 2018-19 | Oct-Mar, 2017-18 | % change |
|---|---|---|---|
| Knowledge Process Outsourcing | 99 | 95 | 04 |
| Ecommerce & Technology Start-ups | 93 | 90 | 03 |
| Financial Services | 87 | 84 | 03 |
| Media & Entertainment | 84 | 81 | 03 |
| Retail | 94 | 92 | 02 |
| BPO / ITeS | 75 | 73 | 02 |
| Fast Moving Consumer Goods & Durables | 71 | 69 | 02 |
| Construction & Real Estate | 65 | 63 | 02 |

LAGGARDS

| Sectors | Apr-Sep, 2018-19 | Oct-Mar, 2017-18 | % change |
|---|---|---|---|
| Agriculture & Agrochemicals | 74 | 78 | -04 |
| Telecommunications | 70 | 74 | -04 |
| Information Technology | 97 | 99 | -02 |
| Healthcare & Pharmaceuticals | 96 | 98 | -02 |
| Educational Services | 80 | 82 | -02 |
| Manufacturing, Engineering & Infrastructure | 63 | 65 | -02 |
| Travel & Hospitality | 65 | 66 | -01 |
| Power & Energy | 83 | 83 | 00 |

***Respondents categorized by sector*

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*TeamLease survey, Nov, 2017 – Mar, 2018*

# Employment Outlook Trends – HY-1, 2018-19

## by City**

LEADERS

| Sectors | Apr-Sep, 2018-19 | Oct-Mar, 2017-18 | % change |
|---|---|---|---|
| Mumbai | 90 | 86 | 04 |
| Delhi | 74 | 71 | 03 |
| Bangalore | 98 | 97 | 01 |
| Hyderabad | 72 | 71 | 01 |
| Pune | 77 | 76 | 01 |

LAGGARDS

| Sectors | Apr-Sep, 2018-19 | Oct-Mar, 2017-18 | % change |
|---|---|---|---|
| Kolkata | 45 | 48 | -03 |
| Ahmedabad | 68 | 70 | -02 |
| Chennai | 65 | 66 | -01 |

***Respondents categorized by the city where they are head-quartered*

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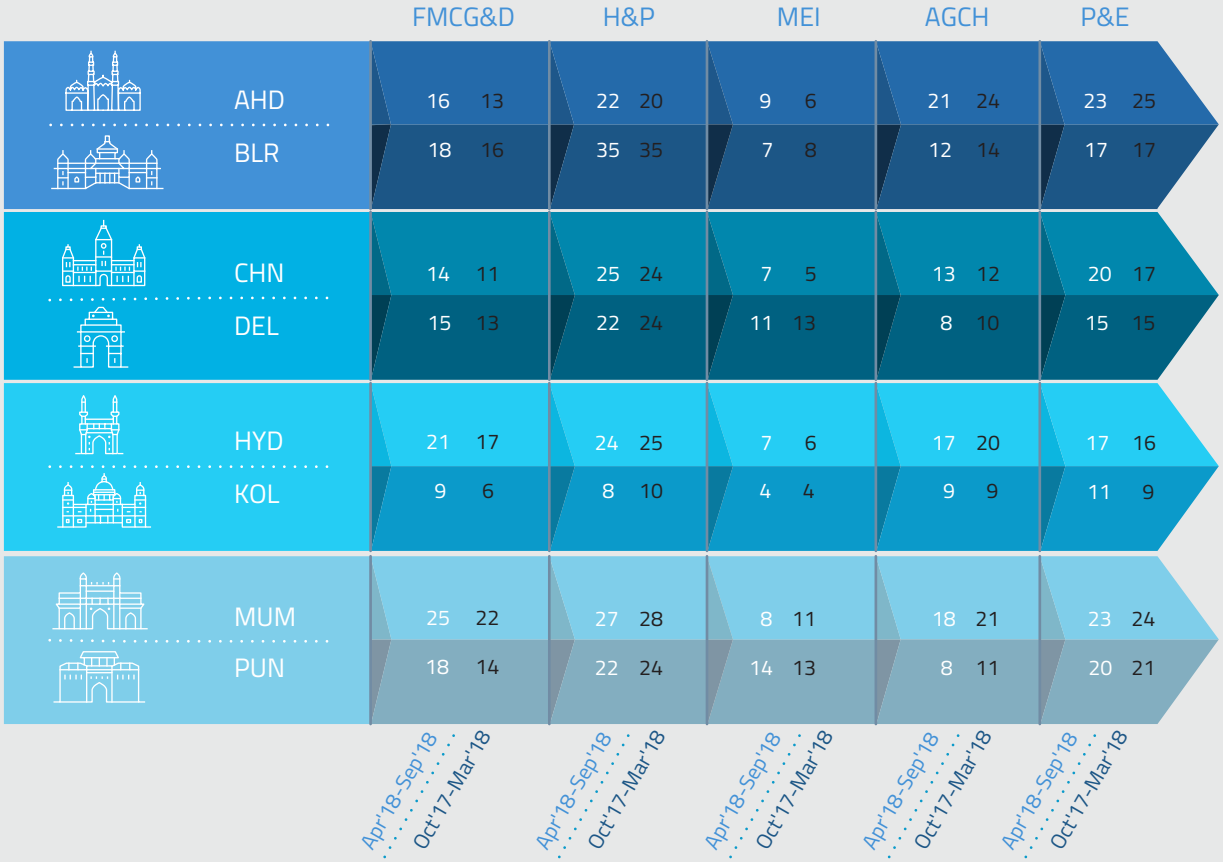
# Job Market Sweet Spots

## City-Sector

### Manufacturing Sectors




| Sectors | Short form |
|---|---|
| Knowledge Process Outsourcing | KPO |
| Ecommerce & Technology Start-ups | EC&TS |
| Financial Services | FS |
| Media & Entertainment | M&E |
| Retail | RET |
| BPO / ITeS | BPO |
| Fast Moving Consumer Goods & Durables | FMCG&D |
| Construction & Real Estate | C&RE |
| Agriculture & Agrochemicals | AGCH |
| Telecommunications | TEL |
| Information Technology | IT |
| Healthcare & Pharmaceuticals | H&P |
| Educational Services | ES |
| Manufacturing, Engineering & Infrastructure | MEI |
| Travel & Hospitality | T&H |
| Power & Energy | P&E |

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# Job Market Sweet Spots

## City-Sector

### Service Sectors

| | TEL | | IT | | FS | | RET | | EC&TS | | M&E | | C&RE | | T&H | | ES | | BPO | | KPO | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Apr'18-Sep'18 | Oct'17-Mar'18 | Apr'18-Sep'18 | Oct'17-Mar'18 | Apr'18-Sep'18 | Oct'17-Mar'18 | Apr'18-Sep'18 | Oct'17-Mar'18 | Apr'18-Sep'18 | Oct'17-Mar'18 | Apr'18-Sep'18 | Oct'17-Mar'18 | Apr'18-Sep'18 | Oct'17-Mar'18 | Apr'18-Sep'18 | Oct'17-Mar'18 | Apr'18-Sep'18 | Oct'17-Mar'18 | Apr'18-Sep'18 | Oct'17-Mar'18 | Apr'18-Sep'18 | Oct'17-Mar'18 |
| AHD | 15 | 18 | 10 | 12 | 18 | 16 | 23 | 21 | 13 | 8 | 21 | 19 | 10 | 6 | 10 | 14 | 19 | 21 | 9 | 9 | 24 | 20 |
| BLR | 22 | 25 | 22 | 24 | 25 | 21 | 32 | 29 | 30 | 26 | 26 | 21 | 14 | 12 | 17 | 17 | 25 | 27 | 17 | 14 | 43 | 40 |
| CHN | 12 | 15 | 14 | 16 | 23 | 20 | 21 | 18 | 19 | 16 | 22 | 19 | 9 | 13 | 6 | 8 | 21 | 22 | 7 | 8 | 21 | 19 |
| DEL | 14 | 16 | 11 | 12 | 21 | 19 | 26 | 23 | 20 | 18 | 23 | 19 | 19 | 16 | 15 | 17 | 20 | 21 | 15 | 11 | 33 | 30 |
| HYD | 18 | 18 | 13 | 15 | 22 | 19 | 27 | 24 | 21 | 17 | 29 | 25 | 21 | 19 | 17 | 15 | 26 | 25 | 8 | 9 | 32 | 29 |
| KOL | 9 | 9 | 8 | 8 | 14 | 10 | 14 | 11 | 11 | 7 | 15 | 13 | 9 | 7 | 12 | 10 | 15 | 18 | 7 | 5 | 17 | 14 |
| MUM | 25 | 27 | 14 | 15 | 26 | 22 | 26 | 24 | 19 | 16 | 21 | 19 | 13 | 10 | 12 | 12 | 20 | 22 | 11 | 13 | 33 | 30 |
| PUN | 15 | 18 | 21 | 21 | 17 | 14 | 28 | 25 | 17 | 15 | 25 | 21 | 19 | 19 | 10 | 13 | 15 | 18 | 9 | 9 | 28 | 27 |

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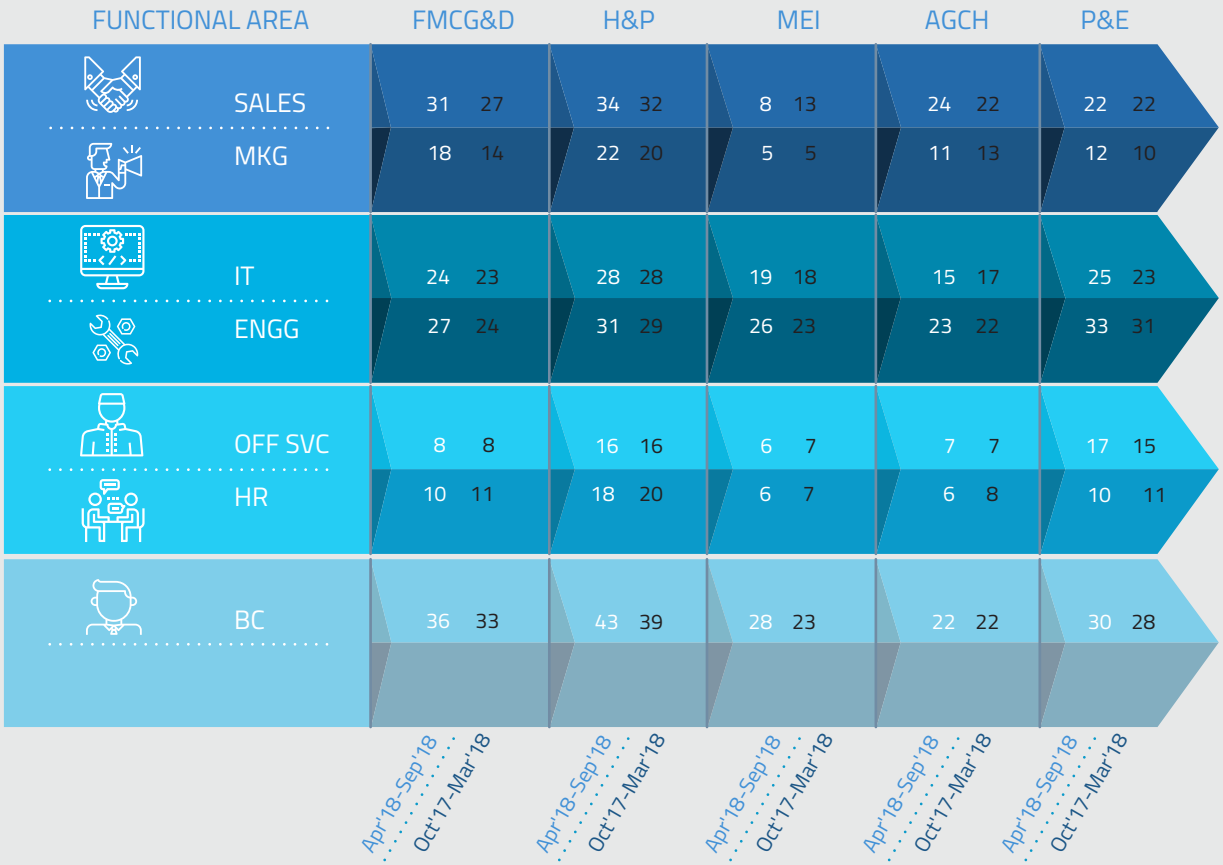
# Job Market Sweet Spots

## Functional Area-Sector

### Manufacturing Sectors

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| BPO / ITeS | BPO |
| Fast Moving Consumer Goods & Durables | FMCG&D |
| Construction & Real Estate | C&RE |
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| Information Technology | IT |
| Healthcare & Pharmaceuticals | H&P |
| Educational Services | ES |
| Manufacturing, Engineering & Infrastructure | MEI |
| Travel & Hospitality | T&H |
| Power & Energy | P&E |

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# Job Market Sweet Spots

## City-Sector

### Service Sectors

| FUNCTIONAL AREA | | TEL | | IT | | FS | | RET | | EC&TS | | M&E | | C&RE | | T&H | | ES | | BPO | | KPO | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Apr'18-Sep'18 | Oct'17-Mar'18 | Apr'18-Sep'18 | Oct'17-Mar'18 | Apr'18-Sep'18 | Oct'17-Mar'18 | Apr'18-Sep'18 | Oct'17-Mar'18 | Apr'18-Sep'18 | Oct'17-Mar'18 | Apr'18-Sep'18 | Oct'17-Mar'18 | Apr'18-Sep'18 | Oct'17-Mar'18 | Apr'18-Sep'18 | Oct'17-Mar'18 | Apr'18-Sep'18 | Oct'17-Mar'18 | Apr'18-Sep'18 | Oct'17-Mar'18 | Apr'18-Sep'18 | Oct'17-Mar'18 |
| SALES | | 22 | 24 | 20 | 17 | 30 | 25 | 38 | 34 | 34 | 32 | 19 | 14 | 12 | 8 | 23 | 21 | 33 | 31 | 25 | 21 | 45 | 40 |
| MKG | | 20 | 21 | 12 | 10 | 18 | 14 | 30 | 27 | 38 | 35 | 11 | 8 | 10 | 7 | 18 | 18 | 17 | 19 | 19 | 17 | 33 | 30 |
| IT | | 22 | 24 | 22 | 24 | 26 | 22 | 27 | 24 | 44 | 40 | 14 | 16 | 18 | 16 | 14 | 15 | 13 | 15 | 18 | 19 | 39 | 37 |
| ENGG | | 22 | 25 | 32 | 30 | 19 | 18 | 30 | 28 | 26 | 28 | 14 | 14 | 22 | 22 | 22 | 23 | 11 | 13 | 23 | 23 | 27 | 26 |
| OFF SVC | | 9 | 8 | 11 | 12 | 11 | 11 | 10 | 8 | 10 | 11 | 12 | 10 | 9 | 9 | 11 | 13 | 10 | 9 | 12 | 9 | 18 | 16 |
| HR | | 13 | 12 | 12 | 12 | 11 | 11 | 12 | 14 | 9 | 7 | 7 | 9 | 8 | 6 | 10 | 10 | 15 | 15 | 15 | 15 | 25 | 22 |
| BC | | 21 | 21 | 25 | 20 | 36 | 34 | 36 | 38 | 55 | 48 | 23 | 23 | 35 | 30 | 31 | 28 | 32 | 28 | 25 | 28 | 28 | 25 |

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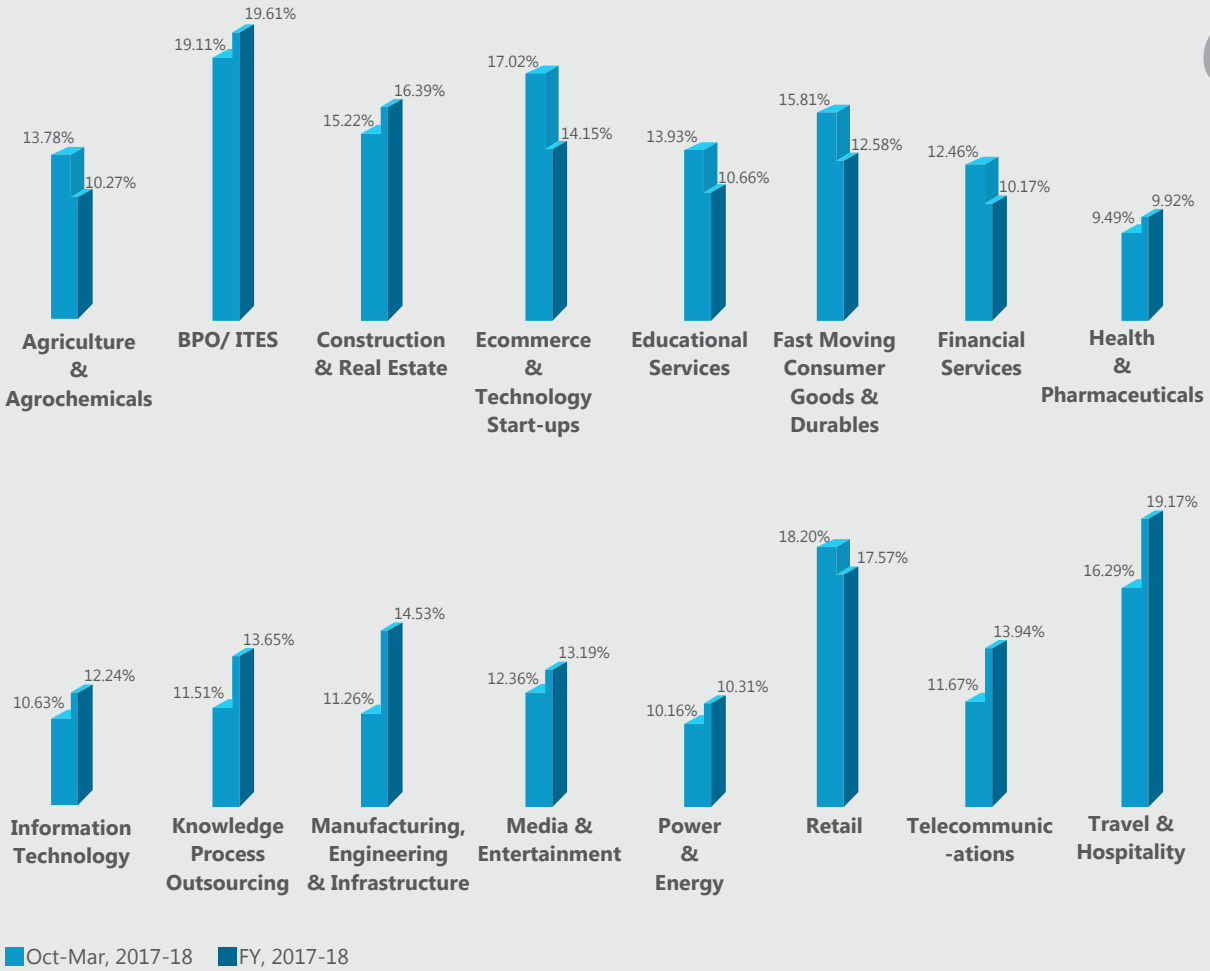
# Spotlight

- Attrition Trends

# Attrition Trends

## Oct-Mar, 2017-18 versus FY 2017-18




- The previous half-year (October-March, 2017-18) saw a lower level of attrition, than during FY 2017-18, for 10 of the 16 sectors.
  BPO / ITeS, Construction & Real Estate, Healthcare & Pharmaceuticals, IT, KPO, Manufacturing, Engineering and Infra-structure, Media & Entertainment, Power & Energy, Telecommunications and Travel & Hospitality saw lower levels of attrition.
- In the remaining 6 sectors attrition rates rose relatively sharply during the previous half-year (October-March, 2017-18).
  Agriculture & Agrochemicals, Ecommerce & Tech Start-ups, Educational Services, Financial Services and Retail witnessed a relatively sharp rise in attrition rates
- BPO / ITeS (19.11%), Retail (18.2%), Ecommerce & Tech Start-ups (17.02%) and Travel & Hospitality (16.29%) have the highest attrition rates for the previous half-year (October-March, 2017-18).
- Healthcare & Pharmaceuticals (9.49%), Power & Energy (10.16%), Information Technology (10.63%) and Manufacturing, Engineering & Infrastructure (11.26%) had the lowest levels of attrition for the previous half-year (October-March, 2017-18).
- Healthcare & Pharmaceuticals (9.92%), Financial Services (10.17%), Agriculture & Agrochemicals (10.27%), Power & Energy (10.31%) and Educational Services (10.66%) had the lowest attrition rates for FY 2017-18.

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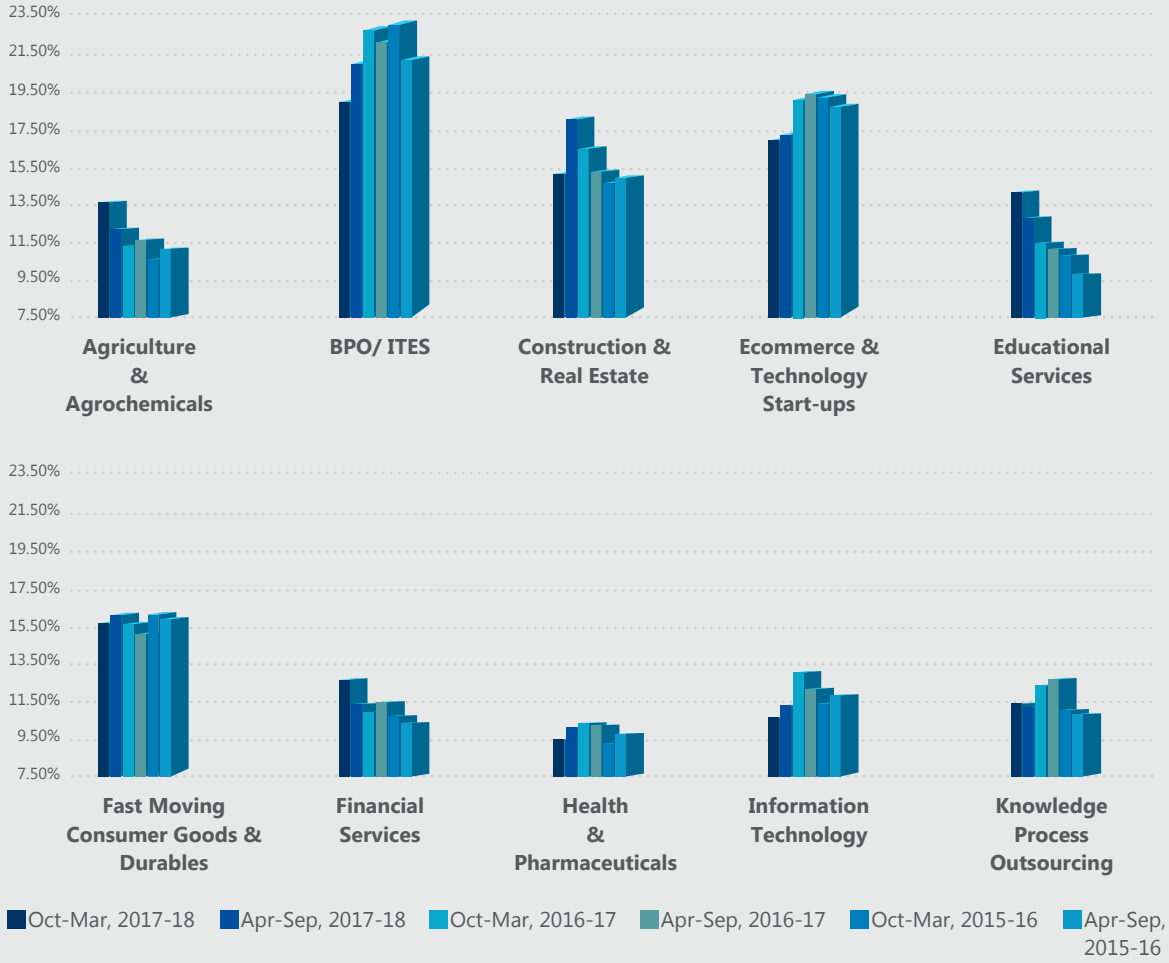
# Attrition Trends

## Past six HYs [fiscal]




- Historical attrition trends vary across sectors – rising for 6 sectors [Educational Services, Agriculture & Agrochemicals, Financial Services, Media & Entertainment, Construction & Real Estate and Power & Energy], falling for 5 [BPO / ITeS, Ecommerce & Tech Start-ups, Information Technology, Healthcare & Pharmaceuticals and Knowledge Process Outsourcing] and mixed trends for the remaining 5 [FMCG & D, Manufacturing, Engineering & Infrastructure Retail, Telecommunications and Travel & Hospitality].
- The steepest rising trends in attrition rates were seen for Educational Services, Agriculture & Agrochemicals, Financial Services and Media & Entertainment.
- Significant downward trends were witnessed in case of BPO / ITeS, Ecommerce & Tech Start-ups and Information Technology.
- In addition to the above three sectors attrition rates seem to be on a downward trajectory for Healthcare & Pharmaceuticals and Knowledge Process Outsourcing as well.
- Healthcare and Pharmaceuticals, Knowledge Process Outsourcing and Fast Moving Consumer Goods / Durables exhibited the most stable attrition trends.

*TeamLease survey, Nov, 2017 – Mar, 2018*

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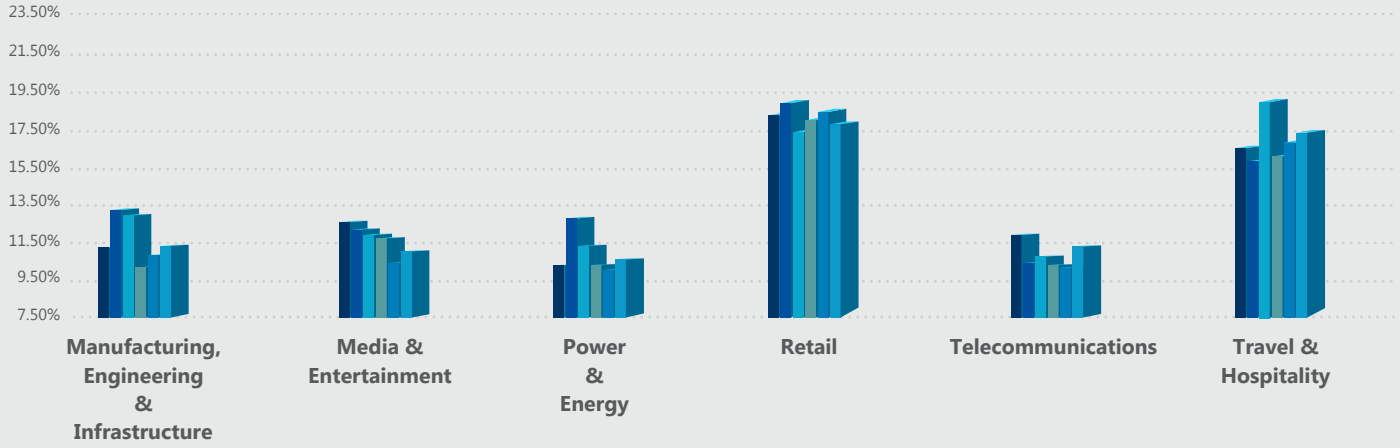
# Attrition Trends

## Past six HYs [fiscal]

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*TeamLease survey, Nov, 2017 – Mar, 2018*

# Annexure- 1

- Sector-Wise Analysis | City-Wise Outlook Statistics

# Sector-wise analysis

## Top sectors

### Knowledge Process Outsourcing

| | Increase | Decrease | No Change | Net Employment Outlook |
|---|---|---|---|---|
| Oct-Mar, 2017-18 | 95 | 00 | 05 | 95 |
| Apr-Sep, 2018-19 | 99 | 00 | 01 | 99 |

Job Growth : 15.2%

- The KPO sector adds 30K jobs every year and employed nearly 2 lac people as of 2017; is set to create 1 lac more jobs by 2020
- Drivers of job growth: Robotic Process Automation, Spending on artificial intelligence (AI) by Indian companies

### Financial Services

| | Increase | Decrease | No Change | Net Employment Outlook |
|---|---|---|---|---|
| Oct-Mar, 2017-18 | 90 | 06 | 04 | 84 |
| Apr-Sep, 2018-19 | 92 | 05 | 03 | 87 |

Job Growth : 12.31%

- The Indian Financial Services sector employed 52 lac people as of 2017 and is likely to create 8 lac new jobs by 2020
- Drivers of job growth: The planned 100 per cent FDI in cash and ATM management companies, Rapid growth of FinTech

### E-commerce & Tech Start ups

| | Increase | Decrease | No Change | Net Employment Outlook |
|---|---|---|---|---|
| Oct-Mar, 2017-18 | 94 | 04 | 02 | 90 |
| Apr-Sep, 2018-19 | 96 | 03 | 01 | 93 |

Job Growth : 13.29%

- The Ecommerce sector employed 1.8 lac people as of 2017; Ecommerce enabled ecosystem will create 800K jobs by 2020
- Drivers of job growth: Digital payments, hyper-local logistics and analytics driven customer engagement

*Job Growth: is the percentage growth of jobs forecast for the current half-year (April-September, 2018-19) over the number of jobs created during the previous half-year (October-March, 2017-18).*

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*TeamLease survey, Nov, 2017 – Mar, 2018 and literature reviews [data sources quoted in the Bibliography section]*

# Sector-wise analysis

## Top sectors

| | Increase | Decrease | No Change | Net Employment Outlook | |
|---|---|---|---|---|---|
| Media & Entertainment | 83 Oct-Mar, 2017-18<br>88 Apr-Sep, 2018-19 | 02 Oct-Mar, 2017-18<br>04 Apr-Sep, 2018-19 | 15 Oct-Mar, 2017-18<br>08 Apr-Sep, 2018-19 | 81 Oct-Mar, 2017-18<br>84 Apr-Sep, 2018-19 | Job Growth : 14.18% |

- The Indian Media & Entertainment (M&E) sector employed 8 lac people as of 2017 and is set to create 4 lac new jobs by 2020
- Drivers of job growth: Digital Content and media, Growing disposable income led by stable economic growth and changing demographics

| | | | | | |
|---|---|---|---|---|---|
| BPO / ITeS | 79 Oct-Mar, 2017-18<br>78 Apr-Sep, 2018-19 | 06 Oct-Mar, 2017-18<br>03 Apr-Sep, 2018-19 | 15 Oct-Mar, 2017-18<br>19 Apr-Sep, 2018-19 | 73 Oct-Mar, 2017-18<br>75 Apr-Sep, 2018-19 | Job Growth : 7.63% |

- BPO / ITeS provided direct employment to 22 lac people as of 2017, and this number is estimated to rise to 65 lac by 2020
- Drivers of job growth: Digital media support services [example: Social Media Measurement and Monitoring]

| | | | | | |
|---|---|---|---|---|---|
| Construction & Real Estate | 74 Oct-Mar, 2017-18<br>77 Apr-Sep, 2018-19 | 11 Oct-Mar, 2017-18<br>12 Apr-Sep, 2018-19 | 15 Oct-Mar, 2017-18<br>11 Apr-Sep, 2018-19 | 63 Oct-Mar, 2017-18<br>65 Apr-Sep, 2018-19 | Job Growth : 6.2% |

- Construction & Real Estate employed 5.94 crore people as of 2017, and will create over 1 crore new jobs by 2020
- Drivers of job growth: The Pradhan Mantri Awaas Yojna for affordable housing, Demand for office space in Tier 2 cities

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# Sector-wise analysis

## Top sectors

| | Increase | Decrease | No Change | Net Employment Outlook | |
|---|---|---|---|---|---|
| Retail | 95 Oct-Mar, 2017-18 | 03 Oct-Mar, 2017-18 | 02 Oct-Mar, 2017-18 | 92 Oct-Mar, 2017-18 | Job Growth : 13.02% |
| | Apr-Sep, 2018-19 97 | Apr-Sep, 2018-19 03 | Apr-Sep, 2018-19 00 | Apr-Sep, 2018-19 94 | |

- The Retail sector employed 4.5 crore people as of 2017, and is set to create 75 lac new jobs by 2020
- Drivers of job growth: 100% FDI in single brand retail via automatic route, penetration of retail in Tier-2 / 3 cities

| | | | | | |
|---|---|---|---|---|---|
| Fast Moving Consumer Goods & Durables | 78 Oct-Mar, 2017-18 | 09 Oct-Mar, 2017-18 | 13 Oct-Mar, 2017-18 | 69 Oct-Mar, 2017-18 | Job Growth : 9.37% |
| | Apr-Sep, 2018-19 80 | Apr-Sep, 2018-19 09 | Apr-Sep, 2018-19 11 | Apr-Sep, 2018-19 71 | |

- FMCG/D employed 87 lac people as of 2017, and this number is estimated to rise to 95 lac by 2020
- Drivers of job growth: Consumption expenditure set to increase at 22.57% CAGR

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# Sector-wise analysis

## Bottom sectors

### Tele-communication

| Increase | Decrease | No Change | Net Employment Outlook | |
|---|---|---|---|---|
| 74 | 00 | 26 | 74 | Job Growth : 7.2% |
| Oct-Mar, 2017-18 | Oct-Mar, 2017-18 | Oct-Mar, 2017-18 | Oct-Mar, 2017-18 | |
| Apr-Sep, 2018-19 | Apr-Sep, 2018-19 | Apr-Sep, 2018-19 | Apr-Sep, 2018-19 | |
| 75 | 05 | 20 | 70 | |

- The Telecommunications sector employed 40 lac people as of 2017; is set to create 5 lac more jobs by 2020
- Drivers of job growth: Emerging technologies such as 5G and M2M, Government of India's boost to production of battery chargers

### Agriculture and Agrochemicals

| | | | | |
|---|---|---|---|---|
| 86 | 08 | 06 | 78 | Job Growth : 9.06% |
| Oct-Mar, 2017-18 | Oct-Mar, 2017-18 | Oct-Mar, 2017-18 | Oct-Mar, 2017-18 | |
| Apr-Sep, 2018-19 | Apr-Sep, 2018-19 | Apr-Sep, 2018-19 | Apr-Sep, 2018-19 | |
| 86 | 12 | 02 | 74 | |

- The sector employed 6.2 crore people as of 2017, and is likely to create 18 lac new jobs by 2020
- Drivers of job growth: Agri-exports expected to increase to $100 billion by 2022, Government of India's Agri-Udaan programme to mentor start-ups

### Healthcare & Pharmaceuticals

| | | | | |
|---|---|---|---|---|
| 99 | 01 | 00 | 98 | Job Growth : 12.71% |
| Oct-Mar, 2017-18 | Oct-Mar, 2017-18 | Oct-Mar, 2017-18 | Oct-Mar, 2017-18 | |
| Apr-Sep, 2018-19 | Apr-Sep, 2018-19 | Apr-Sep, 2018-19 | Apr-Sep, 2018-19 | |
| 98 | 02 | 00 | 96 | |

- The Healthcare and Pharmaceuticals sector employed 25.9 lac people as of 2017; It is expected to create 7 lac new jobs by 2020
- Drivers of job growth: India emerging as a leading destination for high-end diagnostic services, increase in digital adoption leading to market expansion

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# Sector-wise analysis

## Bottom sectors

### Information Technology

| | Increase | Decrease | No Change | Net Employment Outlook |
|---|---|---|---|---|
| Oct-Mar, 2017-18 | 99 | 00 | 01 | 99 |
| Apr-Sep, 2018-19 | 98 | 01 | 01 | 97 |

Job Growth : 11.3%

- The Indian IT sector employed 39 lac people as of 2017, and will create 12 lac new jobs by 2020
- Drivers of job creation: Digital India, Big Data Analytics, AI and robotics, IoT and Blockchain

### Educational Services

| | Increase | Decrease | No Change | Net Employment Outlook |
|---|---|---|---|---|
| Oct-Mar, 2017-18 | 85 | 03 | 12 | 82 |
| Apr-Sep, 2018-19 | 84 | 04 | 12 | 80 |

Job Growth : 13.33%

- The Educational Services sector employed 1.2 crore people as of 2017, and is likely to create 10 lac new jobs by 2020
- Drivers of job creation: Skill development initiatives by the government, transformative and innovative approaches in higher education

### Travel & Hospitality

| | Increase | Decrease | No Change | Net Employment Outlook |
|---|---|---|---|---|
| Oct-Mar, 2017-18 | 77 | 07 | 20 | 70 |
| Apr-Sep, 2018-19 | 75 | 10 | 15 | 65 |

Job Growth : 9.41%

- The Travel and Hospitality sector employed 4 crore people, and is expected to create 50 lac new jobs by 2020
- Drivers of job creation: Foreign tourist arrivals expected to reach 1.53 crore by 2025, expansion of E-visa scheme expected to double tourist inflow

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# Sector-wise analysis

## Bottom sectors

### Manufacturing, Engineering & Infrastructure

| | Increase | Decrease | No Change | Net Employment Outlook |
|---|---|---|---|---|
| Oct-Mar, 2017-18 | 77 | 12 | 11 | 65 |
| Apr-Sep, 2018-19 | 74 | 11 | 15 | 63 |

Job Growth : 5.73%

- Manufacturing, Engineering and Infrastructure employed 6.4 crore people as of 2017; Is expected to add 10 lac new jobs by 2020
- Drivers of job growth: Infrastructure investment of INR 6 lac crore, liberalization of foreign trade policy to promote defence equipment manufacturing

### Power & Energy

| | Increase | Decrease | No Change | Net Employment Outlook |
|---|---|---|---|---|
| Oct-Mar, 2017-18 | 86 | 03 | 11 | 83 |
| Apr-Sep, 2018-19 | 88 | 05 | 07 | 83 |

Job Growth : 11.8%

- The Power and Energy sector employs 15 lac people as of 2017, and this number is estimated to rise to 19 lac by 2020
- Drivers of job growth: Government initiatives linked to India's goal of generating 175 GW electricity from renewable sources by 2022

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# City-wise outlook statistics

| | | Increase | Decrease | No Change | Net Employment Outlook | Job Growth |
|---|---|---|---|---|---|---|
| Mumbai | Oct – Mar, 2017-18 | 89 | 03 | 08 | 86 | 13.07% |
| | Apr – Sep, 2018-19 | 90 | 00 | 10 | 90 | |
| Hyderabad | Oct – Mar, 2017-18 | 77 | 06 | 17 | 71 | 11.69% |
| | Apr – Sep, 2018-19 | 75 | 03 | 22 | 72 | |
| Delhi | Oct – Mar, 2017-18 | 80 | 09 | 11 | 71 | 11.38% |
| | Apr – Sep, 2018-19 | 83 | 09 | 08 | 74 | |
| Ahmedabad | Oct – Mar, 2017-18 | 76 | 06 | 18 | 70 | 9.43% |
| | Apr – Sep, 2018-19 | 74 | 06 | 20 | 68 | |

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# City-wise outlook statistics

| | | Increase | Decrease | No Change | Net Employment Outlook | Job Growth |
|---|---|---|---|---|---|---|
| Kolkata | Oct – Mar, 2017-18 | 55 | 07 | 38 | 48 | 9.28% |
| | Apr – Sep, 2018-19 | 51 | 06 | 43 | 45 | |
| Bengaluru | Oct – Mar, 2017-18 | 98 | 01 | 01 | 97 | 14.39% |
| | Apr – Sep, 2018-19 | 98 | 00 | 02 | 98 | |
| Chennai | Oct – Mar, 2017-18 | 70 | 04 | 26 | 66 | 13.72% |
| | Apr – Sep, 2018-19 | 71 | 06 | 23 | 65 | |
| Pune | Oct – Mar, 2017-18 | 81 | 05 | 14 | 76 | 14.51% |
| | Apr – Sep, 2018-19 | 79 | 02 | 19 | 77 | |

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# Annexure- 2

- The Salary Scene | Research Methodology |
- Sample Design | Bibliography

# The Salary Scene

## What employers pay

| # | City | Sectors | Junior Profile (INR per month) | Mid Profile (INR per month) | Senior Profile (INR per month) |
|---|---|---|---|---|---|
| 1 | Bangalore | BFSI | Operations Executive- 16500 | Finance Analyst- 34000 | Network Engineer- 67000 |
| | | IT | HR Executive- 20100 | Project Lead- 72300 | Digital Marketing Head- 95900 |
| | | EC&TS | Receptionist- 14500 | SEO Manager- 35400 | Chief Technology Officer- 184300 |
| 2 | Mumbai | T&H | Accounts Assistant- 17200 | Data Processing Supervisor- 30700 | Social Media Marketing Manager - 50500 |
| | | M&E | Projectionist- 14600 | Video Editor-Focus- 34900 | Fun Consultant- 49300 |
| | | EC&TS | Reconciliation Executive- 15500 | Research Engineer- 34200 | CRM Manager- 44400 |
| 3 | Delhi | ES | Accountant- 16700 | Academic Advisor- 33800 | Head - Enrollment- 60400 |
| | | RET | Finance Advisor- 25200 | Supervisor- 32900 | HR Officer- 51500 |
| | | TEL | Purchase Executive- 18800 | Testing Engineer- 31900 | Network Architect- 77700 |
| 4 | Chennai | MEI | Cashier- 14800 | Store Manager- 42200 | Production Engineer- 59800 |
| | | IT | Actuary- 36700 | Security Engineer- 46800 | Technical Architect- 108500 |
| | | H&P | Housekeeper- 12300 | Wellness Advisor- 53700 | Director, Operations and Administration- 101100 |
| 5 | Kolkata | C&RE | Commercial Officer - 15300 | Route Patrol Officer- 34700 | Site Engineer- 54600 |
| | | RET | Office Assistant - 12900 | Fashion Consultant - 41500 | Oracle Database Administrator- 91600 |
| | | TEL | Admin Executive- 20200 | Electrical Engineer- 39700 | Design Engineer- 71600 |
| 6 | Hyderabad | RET | Billing Clerk- 13300 | Warehouse Manager- 43500 | Director-HR- 153400 |
| | | FMCD | Store Assistant - 17600 | Quality Controller- 43700 | Company Secretary- 117400 |
| | | IT | Software Engineer- 36200 | Software Testing Engineer- 64200 | Senior Cloud Consultant- 135100 |
| 7 | Pune | AGCH | Agricultural Assistant- 18300 | Safety Officer- 31200 | Head-Operations- 72300 |
| | | BPO/ITeS | Operations Associate- 22600 | Sourcing Manager- 81200 | Project Head- 103500 |
| | | IM&A | Operator- 13100 | Logistics Manager- 48200 | Planning Head- 81200 |
| 8 | Ahmedabad | P&E | Financial Assistant- 22800 | Service Engineer - O&M- 66000 | Structural Engineer-Building- 112500 |
| | | FMCG/D | MIS Executive- 21500 | Sales & Marketing Manager- 51400 | Statistical Analyst- 112200 |
| | | ES | Librarian- 21300 | Training Manager- 57400 | HR Business Partner- 111100 |

| Sectors | Short form |
|---|---|
| Ecommerce & Technology Start-ups | EC&TS |
| Banking, Financial Services & Insurance | BFSI |
| Media & Entertainment | M&E |
| Retail | RET |
| BPO / ITeS | BPO |
| Fast Moving Consumer Goods & Durables | FMCG&D |
| Construction & Real Estate | C&RE |
| Agriculture & Agrochemicals | AGCH |
| Telecommunications | TEL |
| Information Technology | IT |
| Healthcare & Pharmaceuticals | H&P |
| Educational Services | ES |
| Manufacturing, Engineering & Infrastructure | MEI |
| Travel & Hospitality | T&H |
| Power & Energy | P&E |

*Data Source: TeamLease Jobs and Salaries Analysis, 2018*

# Research Methodology

**Sample Design**

Random stratified sampling technique** was used to identify respondents for the survey. Data sources used to collect contact data were:

- Kompass directory for small, medium and large sized companies in the private sector. To ensure continuity with the baseline measurement, the core random sample was drawn from this database.
- NASSCOM / iSPIRT database for IT Services and Ecommerce / Tech start-up companies
- Companies registered with the Bombay Stock Exchange (BSE).

**Respondent Selection**

Target respondents for the study were Business & HR Heads as well as Senior Managers with hiring mandates. The databases offered a contact name for each company listed. 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 TeamLease mobile survey application. Please refer the following section named 'Sample Distribution' for details on city and business size-wise breakup of the sample.

**Secondary Data Sources:**

- Major sources of Indian and international research about informal workforce employment trends in India

***The market is 'stratified' into various segments and respondents are picked at random from each of the segments*

# Sample design

| Respondent profile by Sector/ Cities | MEI | AGCH | P&E | IT | EC&TS | FMCG/D | BFSI | RET | M&E | C&RE | T&H | ES | BPO | KPO | TEL | H&P | TOTAL |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Mumbai | 6 | 6 | 5 | 6 | 5 | 4 | 6 | 5 | 8 | 7 | 8 | 9 | 9 | 7 | 8 | 7 | 106 |
| Delhi | 4 | 7 | 4 | 6 | 4 | 5 | 5 | 6 | 5 | 6 | 8 | 8 | 7 | 6 | 7 | 8 | 96 |
| Bangalore | 5 | 6 | 4 | 7 | 5 | 4 | 6 | 7 | 7 | 8 | 7 | 8 | 8 | 7 | 8 | 8 | 105 |
| Kolkata | 4 | 4 | 5 | 4 | 3 | 4 | 4 | 4 | 6 | 5 | 6 | 6 | 7 | 5 | 6 | 5 | 78 |
| Chennai | 6 | 4 | 3 | 6 | 5 | 6 | 5 | 5 | 6 | 6 | 5 | 8 | 7 | 8 | 6 | 7 | 93 |
| Pune | 4 | 3 | 4 | 4 | 4 | 5 | 4 | 3 | 5 | 4 | 5 | 7 | 6 | 7 | 5 | 6 | 76 |
| Hyderabad | 5 | 4 | 3 | 5 | 3 | 4 | 3 | 4 | 5 | 4 | 6 | 6 | 5 | 6 | 6 | 7 | 76 |
| Ahmedabad | 3 | 3 | 4 | 4 | 4 | 3 | 3 | 3 | 4 | 4 | 5 | 6 | 4 | 5 | 5 | 5 | 65 |
| Total | 37 | 37 | 32 | 42 | 33 | 35 | 36 | 37 | 46 | 44 | 50 | 58 | 53 | 51 | 51 | 53 | 695 |

| Respondent profile by Business Size / Cities | Small [Up to 500 employees] | Medium [500 – 5,000 employees] | Large [5,000 + employees] | TOTAL |
|---|---|---|---|---|
| Mumbai | 26 | 49 | 24 | 99 |
| Delhi | 21 | 47 | 13 | 81 |
| Bangalore | 30 | 52 | 25 | 107 |
| Kolkata | 17 | 44 | 8 | 69 |
| Chennai | 21 | 47 | 15 | 83 |
| Pune | 18 | 44 | 10 | 72 |
| Hyderabad | 25 | 42 | 19 | 86 |
| Ahmedabad | 21 | 49 | 28 | 98 |
| Total | 179 | 374 | 142 | 695 |

| Respondent profile: Candidates | TOTAL |
|---|---|
| Mumbai | 18 |
| Delhi | 19 |
| Bangalore | 21 |
| Kolkata | 12 |
| Chennai | 19 |
| Pune | 18 |
| Hyderabad | 19 |
| Ahmedabad | 19 |
| Total | 145 |

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**Geographies:**

- Metros: A metropolitan city is one having a population of over four million. Delhi, Mumbai, Kolkata, Chennai, Hyderabad, Bangalore, Ahmedabad, Pune, Surat and Nashik are metros.
- Tier-1 cities: Cities that had a population of 100,000 as of Census 2001. Delhi, Mumbai, Kolkata, Chennai, Hyderabad, Bangalore, Ahmedabad, Pune are tier-1 cities.
- Tier-2 cities: are the next level down from Tier I, and are basically smaller cities, statistically 1 million in population, and are usually regional hubs such as state capitals or industrialized centres. Some examples include Pune, Cochin, Mangalore, and Dehra Dun.
- Tier-3 cities: consist of cities with a population of less than a million.
- Rural areas: are villages and have very low population densities.

**Hierarchies:**

- Entry level: Candidates / Employees with less than 1 year work experience.
- Junior level: Employees with greater than 1 year and less than 3 years work experience.
- Mid level: Employees with greater than 3 years work experience and part of the middle management of a company.
- Senior level: Employees with greater than 3 years work experience and part of the senior management of a company.

**Blue Collar:**

- A functional area that comprises manual / hands on labour.

**Business Size:**

- Small businesses: those that employ less than 500 people
- Medium-sized: those that employ 500 to 5,000 employees
- Large businesses: those that employ greater than 5,000 employees

**Job Growth:**

- is the percentage growth of jobs forecast for the current half-year (April-September, 2018-19) over the number of jobs created during the previous half-year (October-March, 2017-18).

TeamLease®

Putting India to Work

**Corporate Office**
6th Floor, BMTC Commercial Complex, 80 Feet Road,
Koramangala, Bangalore - 560 095, Karnataka, India

Tel : + 91-80-3300 2345
Fax : + 91-80-3324 3001
Email : info@teamlease.com
Website : www.teamlease.com

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