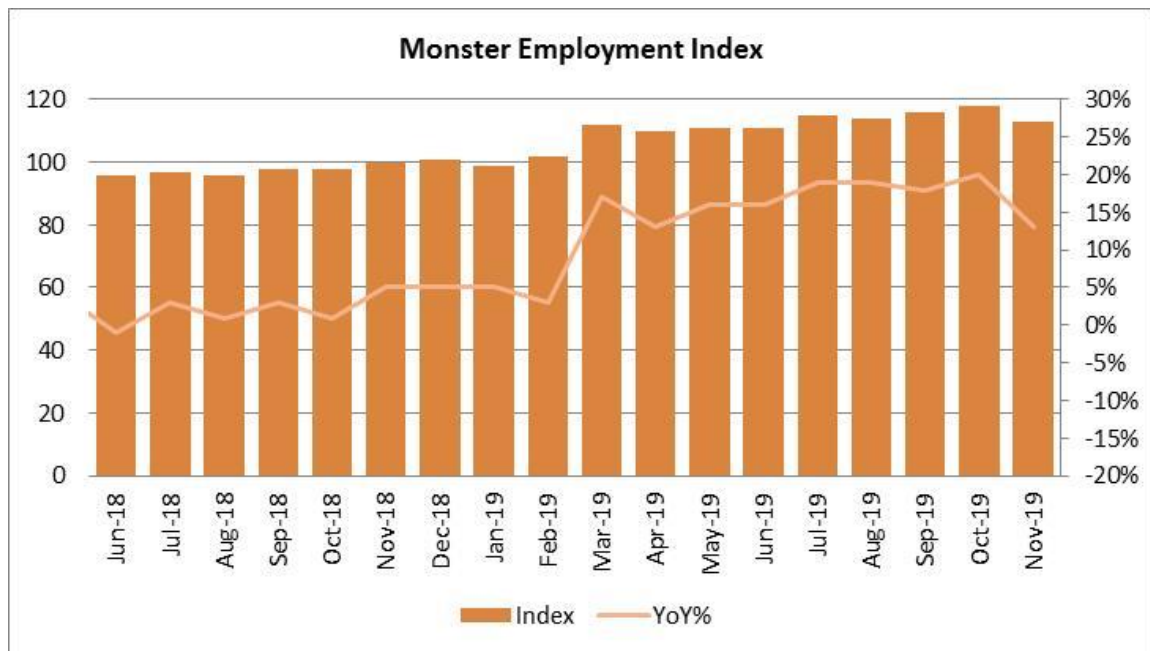


monster[®] EMPLOYMENT INDEX

Monster Employment Index Singapore

November 2019 Index Highlights:

- Monster Employment Index Singapore records annual growth of 13 percent in November 2019.
- Among industry sectors, IT, Telecom/ISP and BPO/ITES witnesses the most-notable growth; and, Shipping/Marine registers the least growth, on-the-year.
- Hospitality professionals record the steepest growth in online demand, on annual basis.



Monster Employment Index Singapore results for the past 18 months are as follows:

Jun 18	Jul 18	Aug 18	Sep 18	Oct 18	Nov 18	Dec 18	Jan 19	Feb 19	Mar 19	Apr 19	May 19	Jun 19	Jul 19	Aug 19	Sep 19	Oct 19	Nov 19	Y-O-Y
96	97	96	98	98	100	101	99	102	112	110	111	111	115	114	116	118	113	13%

Industry Year-over-year Trends: 13 of the 14 industry sectors monitored by the Index surpassed the year-ago level.

- **IT, Telecom/ISP and BPO/ITES** (up 29 percent) continued to lead annual growth in online hiring activity among sectors since September 2018. In the last six-months (between May and November 2019), the sector registered seven percent growth.
- E-recruitment activity in **Hospitality** witnessed double-digit growth of 26 percent in November 2019. However, growth momentum eased by seven percentage points vis-à-vis last month. On a month-on-month basis, the sector witnessed decline of three percent.
- **Advertising, Market Research, Public Relations, Media and Entertainment** (up 21 percent) continued to indicate increased hiring demand for talents on annual basis; also continued to rank among top growth industries since September 2018. On six-month (up 11 percent) basis, the sector led growth among others.
- Year-on-year, **Health Care** (up 12 percent) continued to charted positive growth since March 2019. In short-term as well, the sector fared well; up two percent (three-month) and up four percent (six-month).
- **Engineering, Construction and Real Estate** saw year-on-year growth of five percent this month; down from nine percent in October 2019. The sector witnessed decline in growth on other parameters in short-term; down four percent (month-on-month and three-month) and down one percent (six-month).
- **Production/Manufacturing, Automotive and Ancillary** (zero percent) is the only sector that did not record growth, on-the-year.

Top Growth Industries

Year-over-year Growth	Nov 18	Nov 19	% Growth Y-o-Y
IT, Telecom/ISP and BPO/ITES	169	218	29%
Hospitality	109	137	26%
Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	87	108	24%
Advertising, Market Research, Public Relations, Media and Entertainment	118	143	21%
Education	103	122	18%

Lowest Growth Industries

Year-over-year Growth	Nov 18	Nov 19	% Growth Y-o-Y
Oil and Gas	95	101	6%
Engineering, Construction and Real Estate	97	102	5%
Import/Export	82	86	5%
Shipping/Marine	90	92	2%
Production/Manufacturing, Automotive and Ancillary	104	104	0%

Occupation Year-over-year Trends: Growth in online demand for professionals was positive in 11 of the 12 job roles monitored by the Index.

- **Hospitality** (up 27 percent) registered the most-notable year-on-year growth among monitored occupation groups in November 2019. Even in short-term, the job-role led growth among others; up two percent (three-month) and up 13 percent (six-month).
- Online demand for **Software, Hardware, Telecom** (up 23 percent) professionals continued to chart strong double-digit growth since March 2019, on-the-year. However, growth momentum slowed down vis-à-vis 37 percent last month. The job-role saw hike in short-term as well; up one percent (three-month) and up six percent (six-month).
- **Sales & Business Development** surpassed the year-ago level by 13 percent this month. The job-role continued to rank among top growth occupations since May 2019. In the last six-months (between May and November 2019), Sales & BD professionals experienced a six percent increase in demand.
- **Customer Service** (up seven percent) professionals experienced upsurge in online demand from the year-ago level. However, this was the least growth witnessed in the last eight months. In short-term, the job-role fared well; up one percent (three-month) and up three-percent (six-month).
- **Real Estate** (down two percent) is the only job-role to witness decline on annual basis.

Top Growth Occupations

Year-over-year Growth	Nov 18	Nov 19	% Growth Y-o-Y
Hospitality & Travel	96	122	27%
Software, Hardware, Telecom	130	160	23%
Health Care	106	121	14%
Sales & Business Development	97	110	13%
Marketing & Communications	82	91	11%

Lowest Growth Occupations

Year-over-year Growth	Nov 18	Nov 19	% Growth Y-o-Y
HR & Admin	83	88	6%
Engineering /Production	99	104	5%
Legal	103	107	4%
Purchase/ Logistics/ Supply Chain	92	93	1%
Real Estate	88	86	-2%

COUNTRY-WISE TRENDS

Philippines Highlights

- Monster Employment Index Philippines exhibits annual growth of 15 percent in November 2019.
- Advertising, Market Research, Public Relations, Media and Entertainment witnesses the most-notable annual growth among industry sectors; whereas, Health Care registers the least growth.
- Among job-roles, HR & Admin exhibits the most-notable demand from the year-ago level.

Philippines Top Growth Industries

Year-over-year Growth	Nov 18	Nov 19	% Growth Y-o-Y
Advertising, Market Research, Public Relations, Media and Entertainment	128	160	25%
Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	106	132	25%
BFSI	153	190	24%

Philippines Lowest Growth Industries

Year-over-year Growth	Nov 18	Nov 19	% Growth Y-o-Y
Hospitality	130	140	8%
Engineering, Construction and Real Estate	90	92	2%
Health Care	132	133	1%

Philippines Top Growth Occupations

Year-over-year Growth	Nov 18	Nov 19	% Growth Y-o-Y
HR & Admin	128	173	35%
Finance & Accounts	155	195	26%
Marketing & Communications	135	164	21%

Philippines Lowest Growth Occupations

Year-over-year Growth	Nov 18	Nov 19	% Growth Y-o-Y
Sales & Business Development	132	142	8%
Engineering /Production, Real Estate	91	92	1%
Health Care	125	120	-4%

Malaysia Highlights

- Monster Employment Index Malaysia charts year-on-year growth of three percent in November 2019.
- Among industries, IT, Telecom/ISP and BPO/ITES register the most-notable year-on-year growth and Logistic, Courier/ Freight/ Transportation, Shipping/ Marine exhibits the steepest decline.
- Customer Service professionals witness the steepest growth in online demand among occupation groups, on-the-year.

Malaysia Top Growth Industries

Year-over-year Growth	Nov 18	Nov 19	% Growth Y-o-Y
IT, Telecom/ISP and BPO/ITES	119	149	25%
Hospitality	54	66	22%
Retail	40	45	13%

Malaysia Lowest Growth Industries

Year-over-year Growth	Nov 18	Nov 19	% Growth Y-o-Y
Engineering, Construction and Real Estate	60	58	-3%
Oil and Gas	103	99	-4%
Logistic, Courier/ Freight/ Transportation, Shipping/ Marine	61	58	-5%

Malaysia Top Growth Occupations

Year-over-year Growth	Nov 18	Nov 19	% Growth Y-o-Y
Customer Service	19	30	58%
Hospitality & Travel	38	53	39%
Software, Hardware, Telecom	67	78	16%

Malaysia Lowest Growth Occupations

Year-over-year Growth	Nov 18	Nov 19	% Growth Y-o-Y
Finance & Accounts	62	60	-3%
Purchase/ Logistics/ Supply Chain	68	65	-4%
Engineering /Production, Real Estate	64	61	-5%

By Industry

	2018		2019										
	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
IT, Telecom/ISP and BPO/ITES	169	174	170	184	201	200	204	209	217	220	228	233	218
BFSI	155	159	153	161	178	174	179	181	184	183	189	191	177
Health Care	112	112	111	113	119	117	120	121	123	122	125	127	125
Hospitality	109	112	113	116	125	123	126	132	136	138	140	141	137
Government/ PSU/ Defence	78	81	79	80	83	83	84	82	83	83	84	84	83
Education	103	106	104	109	115	114	117	116	120	121	123	128	122
Retail/Trade and Logistics	111	111	108	112	123	122	118	119	123	121	124	125	120
Engineering, Construction and Real Estate	97	100	97	98	105	103	103	105	107	106	104	106	102
Production/Manufacturing, Automotive and Ancillary	104	104	102	103	111	106	104	106	107	106	106	104	104
Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	87	91	91	92	95	96	97	100	106	108	111	111	108
Advertising, Market Research, Public Relations, Media and Entertainment	118	120	119	127	135	134	129	134	142	149	152	153	143
Shipping/Marine	90	91	91	91	92	99	92	92	92	92	92	92	92
Import/Export	82	82	83	83	85	85	86	86	87	87	87	87	86
Oil and Gas	95	96	95	96	98	200	98	99	101	101	102	102	101

By Occupation

	2018		2019										
	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
Software, Hardware, Telecom	130	128	123	133	150	147	151	153	160	158	163	167	160
Finance & Accounts	88	86	80	88	100	95	101	100	102	98	102	103	95
Sales & Business Development	97	97	93	97	109	104	104	105	109	108	111	113	110
Customer Service	107	107	102	105	112	110	112	112	116	114	118	120	115
Marketing & Communications	82	83	82	84	88	87	87	88	89	92	94	93	91
HR & Admin	83	82	80	84	92	90	90	89	91	90	92	94	88
Engineering /Production	99	99	95	97	107	105	104	107	109	108	109	107	104
Hospitality & Travel	96	96	96	97	109	104	108	117	119	120	122	124	122
Health Care	106	103	100	104	115	114	117	118	121	119	121	126	121
Legal	103	106	105	105	109	108	107	106	108	110	109	107	107
Purchase/ Logistics/ Supply Chain	92	92	92	93	97	96	95	94	96	94	95	96	93
Real Estate	88	90	82	80	89	85	83	88	89	89	96	92	86