



TEAMLEASE
QUARTERLY EMPLOYMENT OUTLOOK
REPORT

October – December 2007
Quarter IV



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Executive Summary

TeamLease has taken up regular survey on quarterly basis to provide information to policy makers and human resources community for better planning and management of country's human capital. The survey reports are available for the quarters of October 2006, January 2007, April 2007, July 2007 and would be made available for the subsequent quarter of October 2007 on 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 and Telecom. The survey focuses on employment growth potential and hiring forecasts, and provides an overview of hiring pattern with relation to location and company profile. The study also explores hiring requirements by management levels, function and age group; the survey captures the responses of HR Heads, CEOs and the Senior Management professionals responsible for hiring decisions in their respective organizations.

In our constant endeavor to provide value and employment update to corporate India, we have added a new element to the report: **Attrition**. Kolkata and Bangalore have shown the highest attrition rate (above 15%) across various sectors while Chennai and Pune (below 5%) have enjoyed the lowest attrition rate in the country. The report also throws light on the hiring pattern and organizations have shown less preference in hiring from rural areas. Tier I cities are showing decreased hiring while metro and tier II cities have seen an increase in employment outlook index.



SURVEY FINDING

- ✦ The overall **net employment outlook** for the quarter beginning October 2007 has **declined by 6%** as compared to the previous quarter, indicating a temporary decrease in hiring needs for the next three months.
- ✦ **New Delhi and Bangalore have shown an increase in net employment outlook by 6% and 3% respectively.** Net employment remains constant across Pune and Hyderabad, while Mumbai, Kolkata, Chennai and Ahmedabad have shown a marginal decline in net employment outlook.
- ✦ **The net employment outlook index points of 78% and net business outlook of 81% for the quarter beginning Oct '07 is the lowest among all the four quarters in the current calendar year.**
- ✦ While all the sectors have shown a decline in net business outlook for the current quarter, New Delhi is the only city that has shown a significant increase of 12% in the net business outlook.
- ✦ ITES and Manufacturing & Engineering services sector have shown an increase of 5% and 2% in employment outlook while Financial Services, Infrastructure, IT, Retail, Media and FMCG have shown a marginal decline in employment outlook for Q4. Telecom sector has shown the 2nd highest hiring index.
- ✦ Retail, Media & FMCG sector has shown increase of 1% in business outlook while all other sectors have either remained constant or shown a marginal decline. New Delhi is the only city that shows a significant increase (12%) in business outlook for the current quarter.
- ✦ **Bangalore and Hyderabad** are the only two cities showing gradual increase in employment growth **in more than two sectors**
- ✦ **Four out of five persons hired** are in metro cities. **Tier I cities** (population between 20-40 lakhs) **have shown decrease in hiring** as compared to Tier II cities (population between 10-20 lakhs). Hiring levels from rural areas (towns with population less than 0.5 lakhs) is the lowest.
- ✦ Recruitment for marketing and production function are the highest (20% & above), while the lowest is for HR and administration (8% each).
- ✦ During the past quarter, Kolkata and Bangalore had highest average attrition rates of 19% and 17% respectively whereas **Chennai and Pune had the lowest at 2% and 5%** respectively.
- ✦ Over the past one year, **attrition rates in Kolkata and New Delhi were the highest at 28% and 23%** respectively.
- ✦ Over the past quarter, infrastructure sector has seen the highest attrition rate at 13% closely followed by manufacturing & engineering services, retail, media & FMCG and IT at 12%.



II. OBJECTIVE

The objective of the proposed survey is to track and understand the hiring expectations of the private sector in India; this will ultimately 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 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	15	15	10	45	30	45	0	30	190
Retail, Media & FMCG	30	30	5	10	5	5	5	0	90
Financial Services	30	10	0	5	5	0	5	5	60
IT	10	15	15	0	10	5	5	0	60
ITES	5	5	10	0	0	0	10	0	30
Infrastructure	5	10	5	5	0	0	5	0	30
Telecom	5	15	0	5	5	0	0	0	30
Total	100	100	45	70	55	55	30	35	490

*Reference: Mum: Mumbai, Del: Delhi, Blore: Bangalore, Kol: Kolkata, Chn: Chennai,
Pun: Pune, Hyd: Hyderabad, Ahd: Ahmedabad*

Respondent Selection

The target respondents for the study were the HR Heads. The database offered a contact name for each company listed. MARCH 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 on the telephone and the responses obtained were coded at the time of data collection. Post the data collection the collated file was sent for the analysis. The analysis was then done using the software called Statistical Package for the Social Sciences (SPSS) package, which is used across the research and consulting organizations across the globe. 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 size.



Questionnaire Design

A questionnaire was used for filling the 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 490 interviews was covered during the month of August 2007 from the database. The database was a combination of Kompass, NASSCOM and 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
4	Oct-Dec 2007	79	1	20	+78
3	Jul-Sep 2007	85	1	14	+84
2	Apr-Jun 2007	83	1	16	+82
1	Jan-Mar 2007	82	1	17	+81

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 3 from Quarter 4

Sectors	<i>(Figures in percentage)</i>				
	Quarter				Net Increase/ Decrease
	4	3	2	1	
IT	78	86	87	89	-8
ITES	92	87	85	90	+5
Financial Services	79	89	84	85	-10
Retail, Media & FMCG	76	84	86	78	-8
Infrastructure	71	82	78	71	-11



Manufacturing & Engineering	78	76	73	71	+2
Telecom	83	*	*	*	0

* 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 - 3 from Quarter - 4

City	<i>(Figures in percentage)</i>				
	Quarter				Net Increase/ Decrease
	4	3	2	1	
Mumbai	77	91	93	90	-14
Delhi	87	81	76	88	+6
Bangalore	96	93	94	90	+3
Kolkata	68	69	64	57	-1
Chennai	64	93	93	74	-29
Pune	80	80	76	82	0
Hyderabad	73	73	70	76	0
Ahmedabad	77	80	80	76	-3

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 Employment Outlook
4	Oct-Dec 2007	82	1	17	+81
3	Jul-Sep 2007	91	1	8	+90
2	Apr-Jun 2007	91	1	8	+90
1	Jan-Mar 2007	93	2	5	+91



The Net Employment Outlook index points of +78% and the Net Business Outlook of +81% of the Quarter IV are the lowest among all the four quarters.

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 - 3 from Quarter – 4

Sectors	<i>(Figures in percentage)</i>				
	Quarter				Net Increase/ Decrease
	4	3	2	1	
IT	77	89	90	96	-12
ITES	87	91	91	92	-4
Financial Services	80	96	91	93	-16
Retail, Media & FMCG	91	90	90	80	+1
Infrastructure	64	96	91	92	-32
Manufacturing & Engineering	82	86	87	90	-4
Telecom	83	*	*	*	0

* 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 - 3 from Quarter - 4

City	<i>(Figures in percentage)</i>				
	Quarter				Net Increase/ Decrease
	4	3	2	1	
Mumbai	83	95	97	97	-12
Delhi	91	79	75	90	+12
Bangalore	89	93	89	97	-4
Kolkata	79	93	93	85	-14



Chennai	58	95	93	87	-37
Pune	85	94	94	89	-9
Hyderabad	81	87	88	86	-6
Ahmedabad	80	93	93	91	-13

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 78.

Employment Outlook Index	Quarter-4: Oct 2007	78
	Quarter-3: July 2007	84
	Quarter-2: April 2007	82
	Quarter-1: January 2007	81

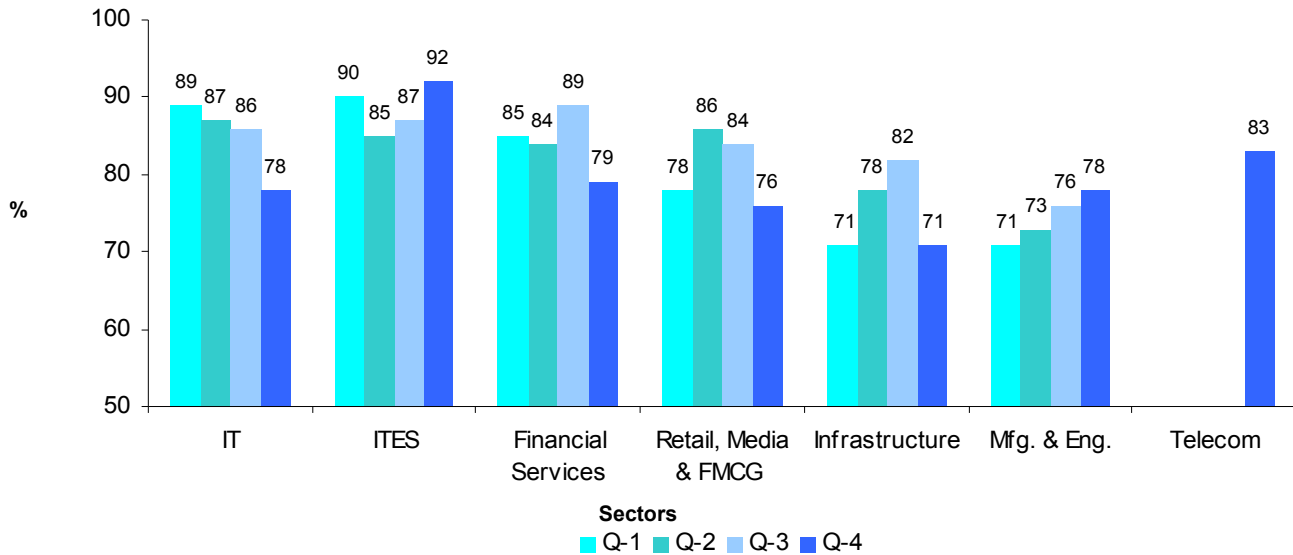
When compared to the previous quarter of July 2007 (Quarter – 3) the Employment Outlook Index has shown a decrease.

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 96.

Employment Trend Index	Quarter-4: Oct 2007	96
	Quarter-3: July 2007	104
	Quarter-2: April 2007	101



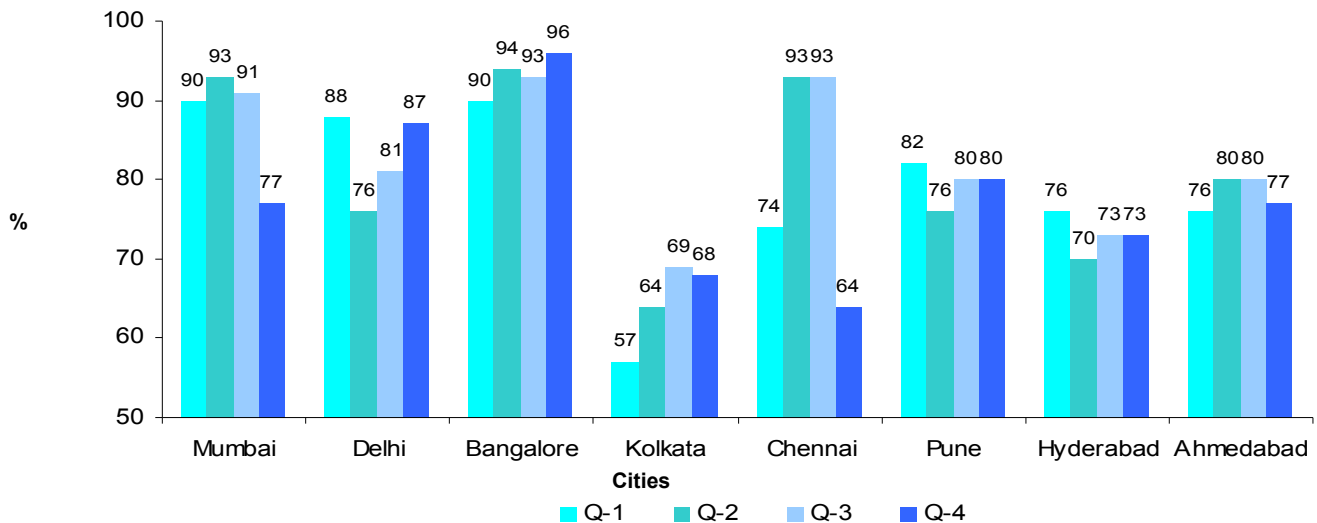
Employment Outlook Index – Sector Wise



In Quarter – 4, there is an increase in Employment Outlook Index points in ITES and Manufacturing & Engineering sectors. The decreases in index points are in Infrastructure, Financial Services, IT and Retail Media & FMCG sectors. Telecom sector which is included in this quarter onwards, index points are the 2nd highest (next to ITES).

Comparing with previous quarters, there is a gradual increase of index points in Manufacturing & Engineering sector and the gradual decrease in index points of IT sector for the current quarter.

Employment Outlook Index – City Wise



In Quarter- 4, there is an increase in Employment Outlook Index points in the cities of Delhi and Bangalore. The index points remain the same for Hyderabad and Pune. The decreases in index points are in the cities of Chennai, Mumbai, Ahmedabad and Kolkata.

Comparing to the last three quarters, the index points for the cities of Delhi, Pune and Hyderabad are increasing; where as the index points of Mumbai, Chennai and Ahmedabad cities are decreasing.

Employment Growth across Cities:

City	Qtr	Total	Sector						
			IT	ITES	FS	RMF	Inf	M&E	Tel
Mumbai	4	77	7	5	22	25	2	12	4
	3	91	9	11	34	12	6	19	-
	2	93	11	11	33	12	6	20	-
	1	90	10	8	24	14	5	29	-
Delhi	4	87	13	4	9	27	6	14	14
	3	81	10	23	10	11	7	20	-
	2	76	13	18	11	9	9	16	-
	1	88	16	24	14	7	12	15	-
Bangalore	4	96	37	22	-	11	9	17	-



	3	93	34	22	11	6	6	14	-
	2	94	34	23	12	6	5	14	-
	1	90	29	24	12	7	8	10	-
Kolkata	4	68	-	-	5	17	5	36	5
	3	69	7	7	18	9	11	17	-
	2	64	9	4	9	11	7	24	-
	1	57	11	5	14	7	2	18	-
Chennai	4	64	10	-	4	6	-	38	6
	3	93	18	18	18	7	6	26	-
	2	93	18	23	18	9	7	18	-
	1	74	24	20	12	11	7	0	-
Pune	4	80	7	-	-	9	-	64	-
	3	80	18	16	8	6	10	22	-
	2	76	16	18	8	6	10	18	-
	1	82	5	8	5	8	5	51	-
Hyderabad	4	73	13	21	13	14	12	-	-
	3	73	18	18	13	5	7	12	-
	2	70	17	19	10	7	7	10	-
	1	76	20	22	10	8	5	11	-
Ahmedabad	4	77	-	-	14	-	-	63	-
	3	80	13	17	14	13	13	10	-
	2	80	10	17	13	13	10	17	-
	1	76	14	13	12	12	11	14	-

[Reference: IT – IT; ITES – ITES; FS – Financial Services; RMF – Retail, Media & FMCG;

Inf – Infrastructure; M&E – Manufacturing & Engineering; Tel – Telecom]



In Quarter – 4, Manufacturing & Engineering sector is the major contributor of employment growth in four out of eight cities. The cities are: Pune, Ahmedabad, Chennai and Kolkata. Retail, Media & FMCG is the major contributor for Mumbai and Delhi's employment growth. In the remaining sectors, major contributors are IT for Bangalore and ITES for Hyderabad. Financial Services is the 2nd major contributor of employment growth for the cities of Mumbai and Ahmedabad. It is also observed that Telecom sector has significant contribution of employment growth in Delhi.

Comparing to the previous quarter, the employment growth in Retail, Media & FMCG is growing in many cities. Those cities are: Delhi, Mumbai, Kolkata, Hyderabad, Bangalore and Pune. An increase in employment growth in Manufacturing & Engineering sector is also found in five out of eight cities. The cities are: Pune, Ahmedabad, Kolkata (all three having a high growth), Chennai and Bangalore. The IT sector is growing in the cities of Bangalore and Delhi. An increase in Infrastructure sector's employment growth is found in Hyderabad and Bangalore; whereas for ITES it is Hyderabad. Though there was no increase in growth in employment of Financial Services in any of the cities, Ahmedabad and Hyderabad are showing neither any increase nor any decrease.

While comparing all the four quarters, it is also observed that the employment growth in the following sectors are gradually increasing in:

Manufacturing & Engineering - in Chennai and Bangalore

Financial Services – in Ahmedabad and Hyderabad

IT – in Bangalore

Infrastructure – in Hyderabad

This shows that Bangalore and Hyderabad are showing gradual increase in employment growth for more than two sectors.

The sectors those having gradual decreases are in the cities of:

Manufacturing & Engineering – in Mumbai

IT – in Chennai

Financial Services – in Delhi

Retail, Media & FMCG – in Chennai



ITES – in Bangalore

Infrastructure – in Delhi

Chennai and Delhi are showing a gradual decline in growth for more than one sector.

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 81.

Business Outlook Index	Quarter-4: October 2007	81
	Quarter-3: July 2007	90
	Quarter-2: April 2007	90
	Quarter-1: January 2007	91

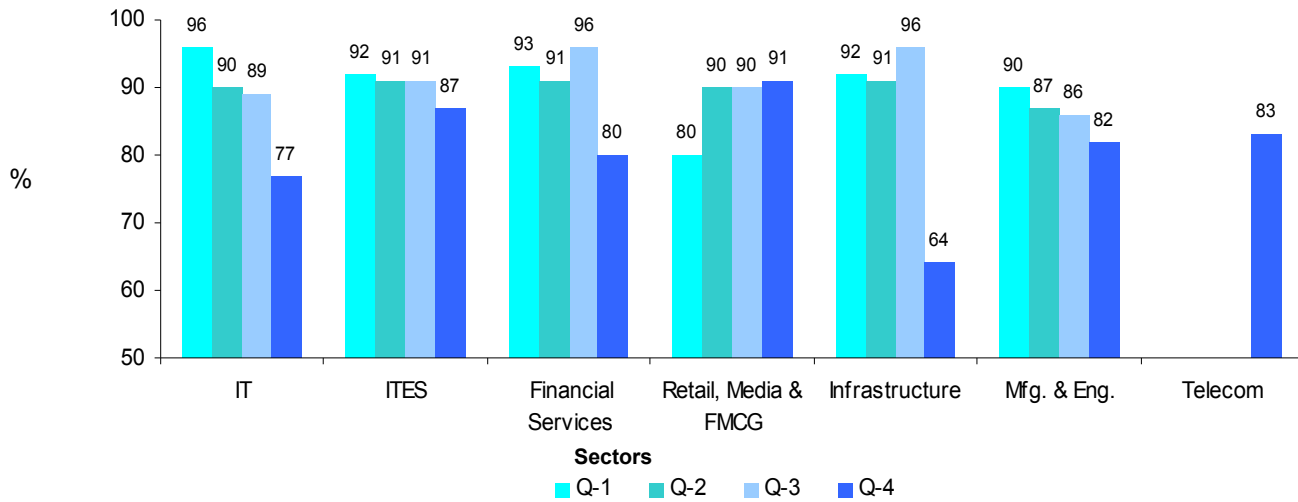
Business Outlook Index Point in Quarter - 4 as compared to the previous quarter has decreased by 9 Index points.

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 89.

Business Confidence Index	Quarter-4: October 2007	89
	Quarter-3: July 2007	99
	Quarter-2: April 2007	99



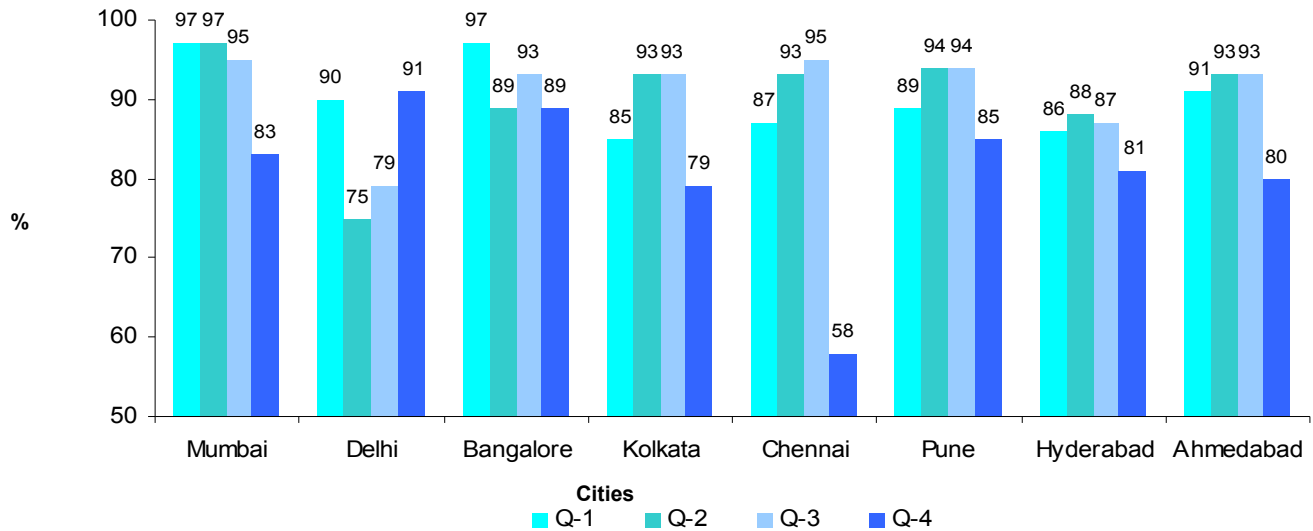
Business Outlook Index – Sector Wise



In Quarter – 4, the Business Outlook Index points has not shown any significant increase in any of the sectors, except a slight increase in Retail, Media & FMCG; which is also having highest index points (91). Especially, index points of Infrastructure have majorly decreased.

Comparing to the last three quarters also, only Retail Media & FMCG is having a slight increase in Business Outlook Index points. The sectors which show gradual decreases are: IT, Manufacturing & Engineering and ITES.

Business Outlook Index – City Wise



In Quarter – 4, Business Outlook Index points for Delhi shows an increase. Rest of the cities shows decrease in index points. A major decrease in index points is observed in the index points of Chennai (by 37 points).

Among all the four quarters, Delhi has got the highest ever index points in Quarter – IV; whereas for rest of the cities, the index points in Quarter – IV are the lowest ever.

Sector Growth across Cities:

City	Qtr	Total	Sector						
			IT	ITES	FS	RMF	Inf	M&E	Tel
Mumbai	4	83	9	5	26	25	2	13	3
	3	95	12	11	35	11	6	20	-
	2	97	9	9	33	20	11	15	-
	1	97	12	6	26	12	6	35	-
Delhi	4	91	14	4	10	24	10	13	16
	3	79	8	20	13	11	11	16	-
	2	75	11	13	10	14	16	11	-
	1	90	16	22	13	6	13	20	-
Bangalore	4	89	25	19	-	11	10	24	-
	3	93	33	21	12	6	6	15	-
	2	89	31	18	11	10	9	10	-



	1	97	34	21	12	8	6	16	-
Kolkata	4	79	-	-	7	9	4	54	5
	3	93	11	11	20	11	11	29	-
	2	93	11	11	18	11	11	31	-
	1	85	11	12	16	13	7	26	-
Chennai	4	58	8	-	4	6	-	34	6
	3	95	18	18	18	8	7	26	-
	2	93	18	16	18	10	9	22	-
	1	87	19	25	15	5	8	15	-
Pune	4	85	8	-	-	10	-	67	-
	3	94	18	20	8	8	10	30	-
	2	94	18	20	10	8	10	28	-
	1	89	4	13	4	10	3	55	-
Hyderabad	4	81	15	31	12	11	12	-	-
	3	87	20	22	13	7	8	17	-
	2	88	22	21	13	7	8	17	-
	1	86	23	22	13	11	6	11	-
Ahmedabad	4	80	-	-	15	-	-	65	-
	3	93	17	17	16	13	17	13	-
	2	93	17	17	13	13	16	17	-
	1	91	5	12	4	10	3	57	-

In the Quarter – 4, Manufacturing & Engineering is the major contributor for sector growth in four out of eight cities. Those are: Pune, Ahmedabad, Kolkata and Chennai. ITES is the major contributor of growth in Hyderabad; Financial Services for Mumbai; IT for Bangalore; and Retail, Media, FMCG for Delhi. The contributions of Manufacturing & Engineering and Retail, Media & FMCG to Bangalore and Mumbai respectively are very close to the major contributors.

Comparing to the previous quarter, Manufacturing & Engineering sector is growing in five out of eight cities. Those are: Pune, Ahmedabad, Kolkata, Chennai and Bangalore. Retail, Media & FMCG is growing in four out of eight cities. The cities are: Mumbai, Delhi, Hyderabad, Bangalore and Pune. Among the rest of the sectors, Infrastructure is growing in the cities of Hyderabad and Bangalore, ITES in Hyderabad and IT in Delhi. It is also observed that Hyderabad, Bangalore, Pune and Delhi have reported growth in more than one sector.

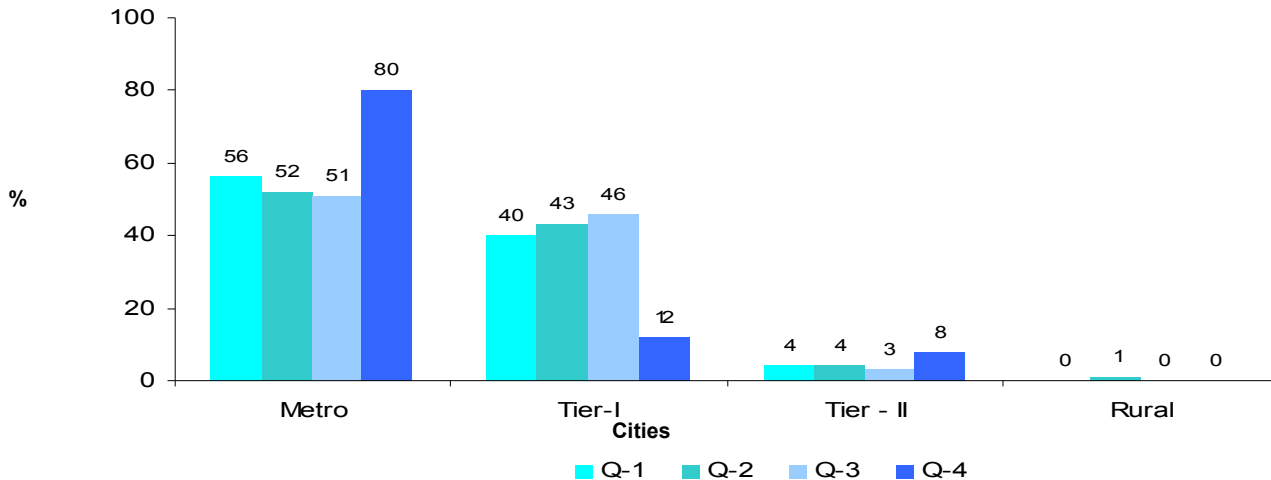


While comparing the last four quarters, Manufacturing & Engineering is gradually growing in Chennai and Infrastructure is growing in Hyderabad. Hyderabad and Chennai have shown a decline in IT and Retail, Media and FMCG has shown a decline in Kolkata.

VII. EMPLOYMENT SCENARIO

4 out of 5 persons are hired in Metro cities.

Hiring across Geographical Spread



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

Tier-I cities - having population of 20- 40 lakhs: Hyderabad, Ahmedabad & Pune

Tier-II cities - having population of 10- 20 lakhs

Rural: Towns with population less than 0.5 lakhs]

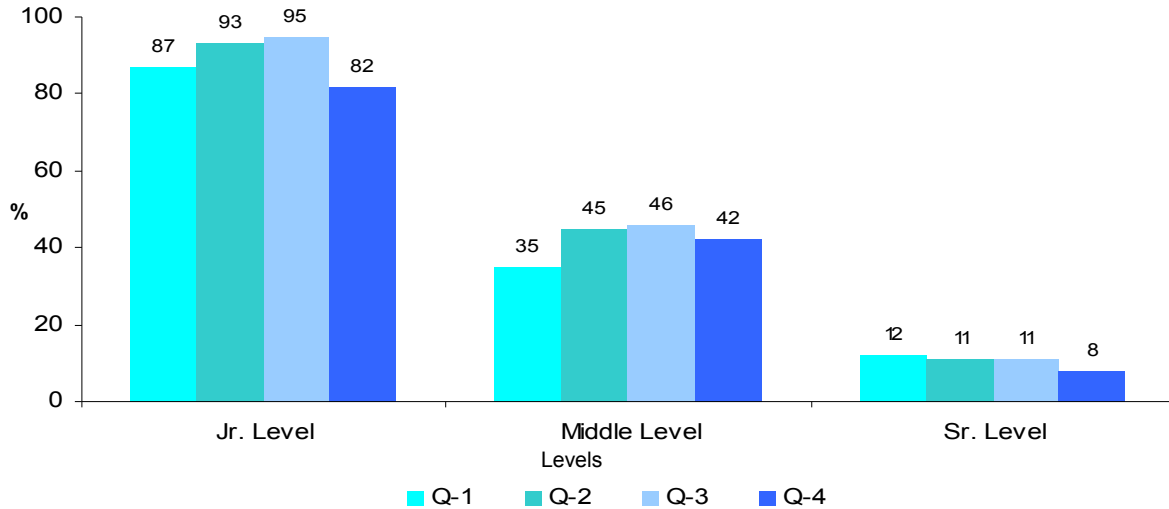
Respondents were asked to evaluate their intention to hire from Metro, Tier -I, Tier II cities and Rural areas.

Comparing to the previous quarter, the hiring trend in Metro Cities is majorly increasing; where as in Tier -I cities, it is decreasing. It is also observed that there is an increase in hiring in Tier-II cities.



Hiring across Managerial Level

Intention to hire across all the three levels are decreasing



[Jr. Level: 0-3 years experience]

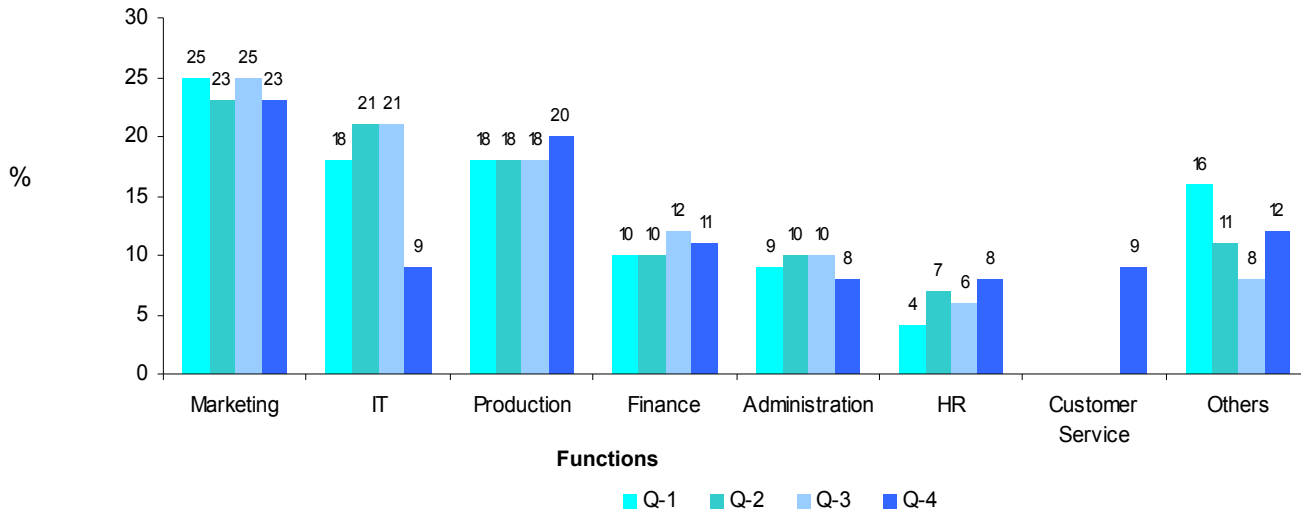
[Middle Level: 3-7 years experience]

[Sr. Level: More than 7 years experience]

In Quarter – 4, it has been observed that the recruitment of Middle and Senior levels proportionate with the recruitments of the Jr. Level at the ratio of 10:5:1. Comparing to all the four quarters, the recruitment of Senior Level is decreasing.



Hiring across functions



* Others include Quality Assurance and Maintenance, etc.

In Quarter – 4, the recruitment for Marketing and Production functions are the highest one (20% & above); and the lowest one are HR and Administration (each 8%). There is a significant amount of recruitment for Customer Service (9%). There is a slight increase in recruiting for the Production function.

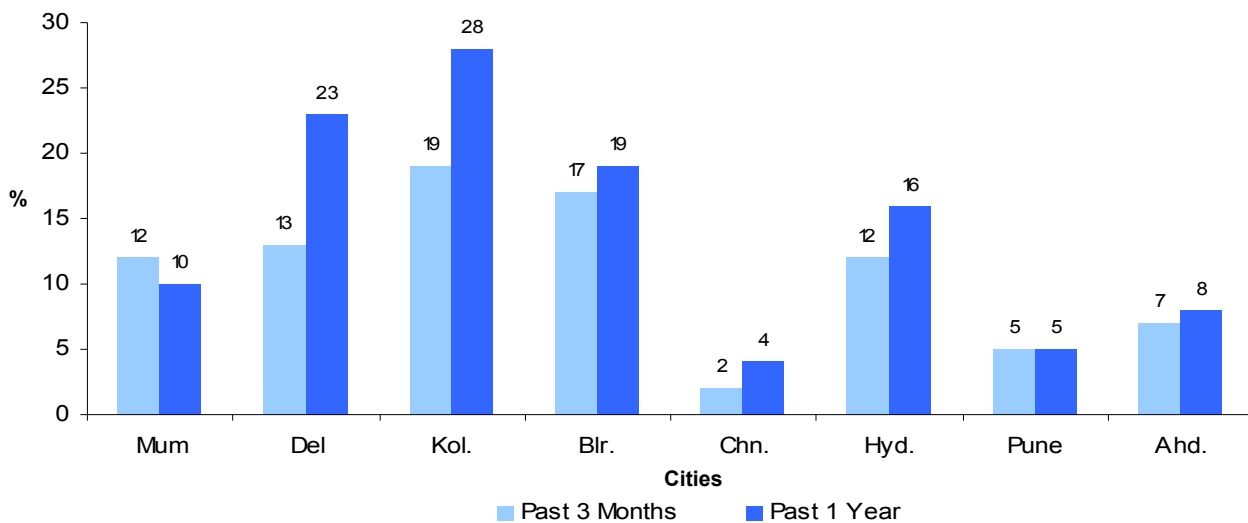
Particulars	Mum	Del	Kol	Blore	Chn	Hyd	Pun	Ahd	Responses	
Samples Targeted	100	100	70	45	55	30	55	35	No.s	%
Marketing	43	54	33	12	19	11	34	19	225	23
Production	33	29	38	6	16	6	35	21	184	19
Finance	28	30	8	11	6	6	11	10	110	11
Customer Service	13	31	9	9	4	8	13	5	92	10
IT	9	22	5	19	8	13	10	3	89	9
Administration	8	17	11	6	15	6	10	7	80	8
HR	7	17	9	9	8	7	10	7	74	8
Others	12	16	15	15	20	12	17	10	117	12
Total	153	216	128	87	96	69	140	82	971	100



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 490 the number of responses was 971 for Quarter-4

Attrition rate city-wise



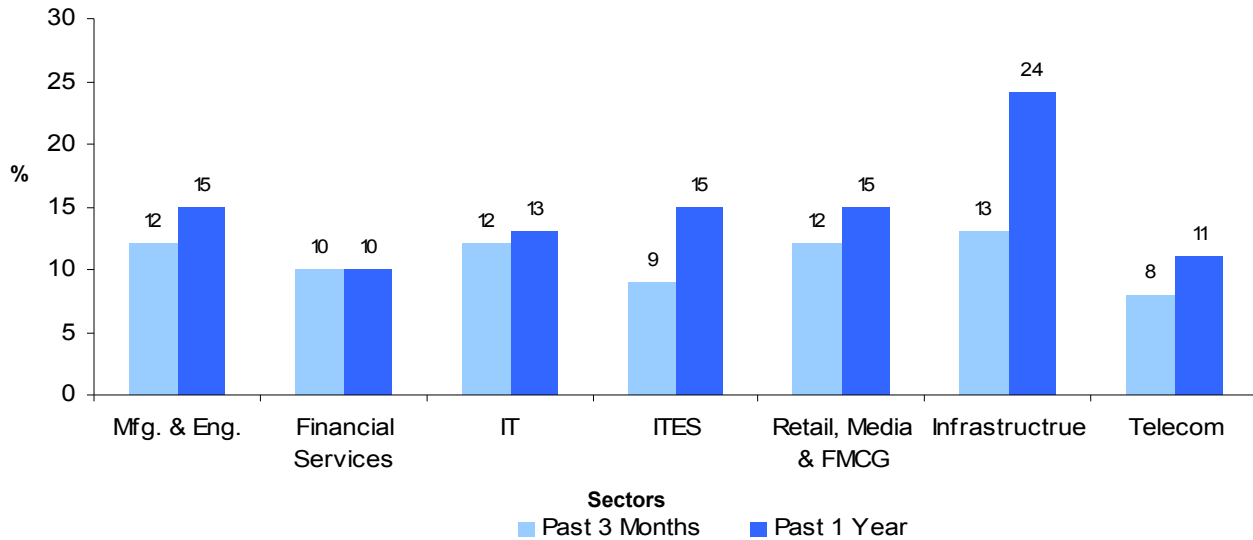
During the past three months, Kolkata and Bangalore cities were having the highest attrition rates with 19% and 17% respectively; whereas Chennai and Pune was having the lowest attrition rates (2% and 5% respectively).

During the past one year period, the attrition rates in Kolkata and Delhi were the highest (28% and 23% respectively); whereas, Chennai and Pune were having the lowest attrition rates (2% and 5% respectively).

While comparing with the past one year period, during the past three months the attrition rates in majority of the cities are lower. Especially, those cities having high attrition rates like Kolkata and Delhi, the changes are significant. The attrition rate in Pune remains the same for both the periods.



Attrition rate by sector-wise



The attrition rate is above 10% in 4 out of 7 sectors in the past three month’s period. Among these, Infrastructure sector is the highest one with 13%, closely followed by Manufacturing & Engineering, Retail, Media & FMCG and IT sectors (each 12%).

During the past one year period, Infrastructure is the highest one with 24% and the Financial Services is the lowest one with 10%. While comparing the past one year with the past three months period, across all the Sectors the attrition rate is lower. Especially, it is observed in Infrastructure sector, which is having the highest attrition rate.



Cross Industry Movements

Inbound Movement

Sector		Sector moving in (in percentage)						
		Manfg & Engg	Financial Services	IT	ITES	Retail, Media & FMCG	Infra-structure	Telecom
Sector originating from	Manfg & Engg	42.1	0	13.3	0	14.8	13.3	6.7
	Financial Services	1.1	23.1	5.0	0	2.3	0	3.3
	IT	15.8	13.5	36.7	0	6.8	10.0	30.0
	ITES	1.6	5.8	10.0	58.3	0	3.3	0
	Retail Media & FMCG	6.3	15.4	3.3	8.3	27.3	0	0
	Infrastructure	1.6	0	0	0	0	30.0	0
	Telecom	0	0	0	0	0	0	20.0
	Others	0.5	0	0	0	1.1	0	3.3
	Can not say	31.1	42.3	31.7	33.3	47.7	43.3	36.7

More than 1/3rd of the respondents could not say that to which sectors the employees are moving. Only in ITES Sector, more than half of the employees are moving within the sector. In Manufacturing & Engineering and IT sectors, more than 1/3rd of the employees are moving with in the same sector.

Outbound Movement

Sector		Sector originating from (<i>in percentage</i>)						
		Manfg & Engg	Financial Services	IT	ITES	Retail, Media & FMCG	Infra-structure	Telecom
Sector moving to	Manfg & Engg	28.4	23.3	21.7	0	13.3	6.7	10.0
	Financial Services	7.3	30.0	5.0	3.3	2.2	0	6.7
	IT	11.2	13.3	21.7	0	6.7	13.3	13.3
	ITES	3.9	0	5.0	30.0	1.1	0	0
	Retail Media & FMCG	6.1	0	3.3	0	27.8	0	3.3
	Infrastructure	2.4	0	0	0	0	33.3	0
	Telecom	2.0	0	0	0	1.1	0	30.0
	Others	0.2	0	0	0	1.1	0	0
	Can not say	38.4	33.3	43.3	66.7	46.7	46.7	36.7

In ITES sector, 2/3rd of the respondents could not say from which sector the employees are coming from. In other sectors also, more than 1/3rd of the respondents could not say from which sector they are coming from.



IX. 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	Sample Targeted
Mumbai	65	21	7	7	100
Delhi	63	20	10	7	100
Bangalore	51	11	5	3	45
Kolkata	32	13	0	0	70
Chennai	25	5	7	18	55
Pune	23	6	0	1	55
Hyderabad	35	6	7	7	30
Ahmedabad	25	3	4	3	35
Total	319	85	40	46	490
% on total	65	17	9	9	100

Turnover Base (Rs. in Cr.)

City	<250	250 - 1000	>1000	Not Disclosed*	Sample Targeted
Mumbai	65	7	3	25	100
Delhi	27	5	4	64	100
Bangalore	31	6	3	30	45
Kolkata	26	1	2	16	70
Chennai	15	2	15	23	55



Pune	16	2	0	12	55
Hyderabad	37	5	4	9	30
Ahmedabad	21	3	0	11	35
Total	238	31	31	190	490
% on total	49	6	6	39	100

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

Industry Sub – Classification

The Survey captures specific Industry sub classification across Manufacturing and Financial sector on account of its diversity as against other sectors like IT, ITES, Retail, Media & FMCG and Infrastructure.

Industry Sub – Classification (Manufacturing)

City	Engineering	Industrial	Food Processing	Others	Sample Targeted
Mumbai	4	6	3	2	15
Delhi	2	6	4	3	15
Kolkata	8	30	5	2	45
Bangalore	3	5	2	-	10
Chennai	5	15	10	-	30
Hyderabad	-	-	-	-	0
Pune	13	20	10	2	45
Ahmedabad	3	15	10	2	30
Total	38	97	44	11	190

Industry Sub – Classification (Financial Services)

City	Finance	Banks	Insurance	Securities	Others	Sample Targeted
Mumbai	5	8	12	5	-	30
Delhi	1	4	3	2	-	10



Kolkata	1	1	1	2	-	5
Bangalore	-	-	-	-	-	0
Chennai	-	2	3	-	-	5
Hyderabad	-	2	1	2	-	5
Pune	-	-	-	-	-	0
Ahmedabad	2	1	1	1	-	5
Total	9	18	21	12	-	60

Hiring Across Functions:

The tables below indicate the percentage of the responses taken against specific functions for Hiring Intentions.

Quarter - 1

Hiring across various functions/ city	Sample Targeted	% of responses against specific function							Total
		Mktg	IT	Prdn	Fin	Admn	HR	Others	
Mumbai	85	5	3	4	2	3	2	4	23
Delhi	80	4	3	2	1	1	1	2	14
Bangalore	85	3	4	2	1	1	0	3	14
Kolkata	45	2	1	2	1	0	0	1	7
Chennai	55	2	2	1	1	0	0	1	7
Pune	50	3	1	3	1	1	0	0	9
Hyderabad	60	3	3	3	2	1	1	2	15
Ahmedabad	30	3	1	1	1	2	0	3	11
Total	490	25	18	18	10	9	4	16	100

Quarter - 2

Hiring	Sample	% of responses against specific function	Total
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across various functions/ city	Targeted	Mktg	IT	Prdn	Fin	Admn	HR	Others	
Mumbai	85	7	4	3	5	4	3	1	27
Delhi	80	4	3	2	1	1	0	3	14
Bangalore	85	1	3	2	1	0	0	3	10
Kolkata	45	2	1	3	0	0	0	0	6
Chennai	55	1	2	2	1	1	1	2	10
Pune	50	4	3	2	1	2	1	0	13
Hyderabad	60	2	3	2	1	1	1	2	12
Ahmedabad	30	2	2	2	0	1	1	0	8
Total	490	23	21	18	10	10	7	11	100

Quarter - 3

Hiring across various functions/ city	Sample Targeted	<i>% of responses against specific function</i>							Total
		Mktg	IT	Prdn	Fin	Admn	Others	HR	
Mumbai	85	8	4	3	4	4	1	2	26
Delhi	80	4	3	2	1	1	1	0	12
Bangalore	85	1	1	0	1	0	0	1	4
Kolkata	45	1	4	2	2	0	2	0	11
Chennai	55	1	2	3	1	1	2	1	11
Pune	50	4	3	3	1	2	0	0	13
Hyderabad	60	4	2	3	1	1	1	1	13
Ahmedabad	30	2	2	2	1	1	1	1	10
Total	490	25	21	18	12	10	8	6	100



Quarter - 4

Hiring across various functions/ city	Sample Targeted	<i>% of responses against specific function</i>								Total
		Mktg	Prdn	Others	Fin	IT	Custmr Serv	HR	Admn	
Mumbai	100	4	3	1	3	1	1	1	1	15
Delhi	100	6	3	2	2	2	3	1	1	20
Bangalore	45	3	4	1	1	1	1	1	1	13
Kolkata	70	1	1	2	1	2	1	1	1	10
Chennai	55	2	2	2	1	1	0	1	2	11
Pune	55	1	1	1	1	1	1	1	1	8
Hyderabad	30	4	3	2	1	1	1	1	0	13
Ahmedabad	35	2	2	1	1	1	1	1	1	10
Total	490	23	19	12	11	10	9	8	8	100