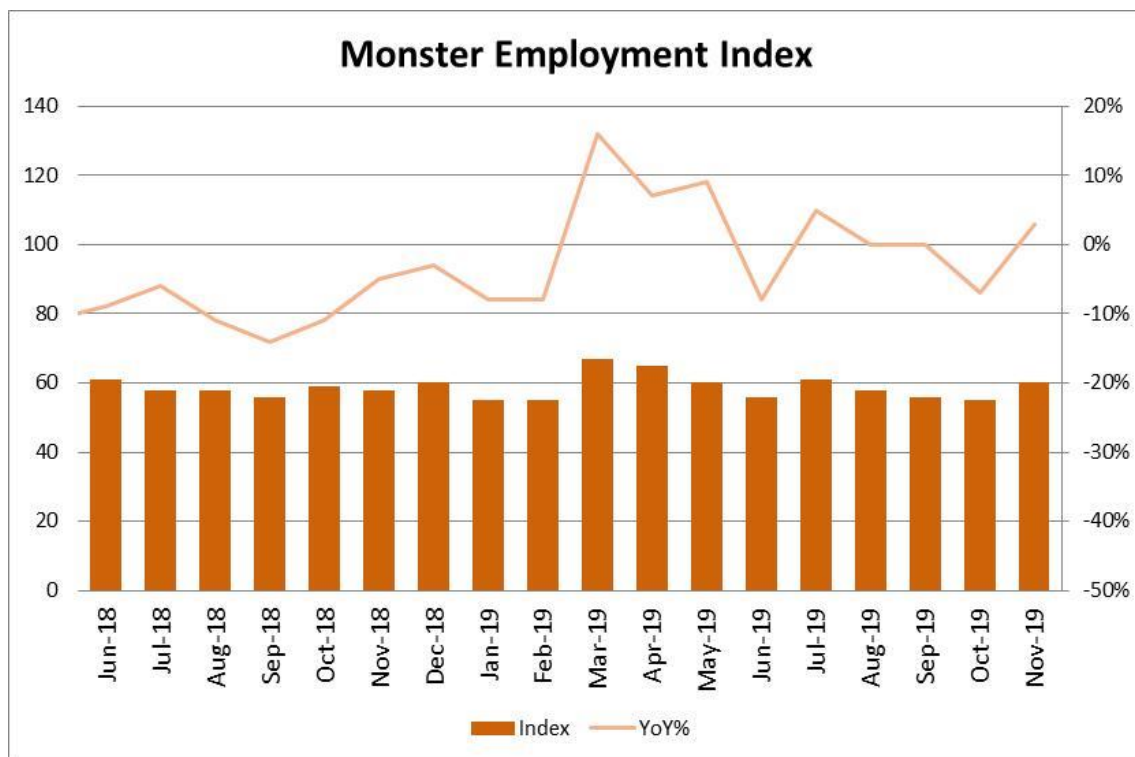


monster[®] EMPLOYMENT INDEX

Monster Employment Index Malaysia

November 2019 Index 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.



Monster Employment Index Malaysia 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
61	58	58	56	59	58	60	55	55	67	65	60	56	61	58	56	55	60	3%

Industry Year-over-year Trends: Five of the nine industry sectors monitored by the Index, witnessed growth in online recruitment activity.

- **IT, Telecom/ISP and BPO/ITES** (up 25 percent) registered the most-notable annual growth among industry sectors. Pace of growth improved by 14 percentage points vis-à-vis last month. In short-run as well, the sector charted positive growth; up eight percent (month-on-month), up four percent (three-month) and up 17 percent (six-month).
- Year-on-year, **Hospitality** leaped by 22 percent in November 2019; up from five percent in October. On a month-on-month basis the sector, at 14 percent, saw the steepest growth among others.
- Long-term growth momentum in **Retail** (up 13 percent) paced up by 20 percentage points; up from decline of seven percent in October 2019. In short-term (month-on-month), the sector saw a jump of 13 percent in e-recruitment activity.
- **Advertising, Market Research, Public Relations, Media and Entertainment** (up nine percent) recovered positive annual growth following a decline of two percent last month. This was also the most-notable hike since June 2019. On other parameters as well, the sector charted growth; up seven percent (month-on-month) and up five percent (three-month and six-month).
- **Engineering, Construction and Real Estate** (down three percent) continued to register year-on-year decline since April 2019. However, growth rate witnessed improvement of seven percentage points; down from decline of 10 percent in October 2019. Monthly demand exhibited four percent growth.
- **Logistic, Courier/ Freight/ Transportation, Shipping/ Marine** (down five percent) saw the steepest decline among monitored sectors on annual basis.

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%
Advertising, Market Research, Public Relations, Media and Entertainment	56	61	9%

Lowest Growth Industries

Year-over-year Growth	Nov 18	Nov 19	% Growth Y-o-Y
Production/Manufacturing, Automotive and Ancillary	90	89	-1%
Engineering, Construction and Real Estate	60	58	-3%
Oil and Gas	103	99	-4%
Logistic, Courier/ Freight/ Transportation, Shipping/ Marine	61	58	-5%

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

- **Customer Service** (up 58 percent) charted the most-notable annual growth among the monitored occupation categories; also the steepest hike in the series. Month-on-month, the job-role saw growth of 25 percent.
- Online demand for **Software, Hardware, Telecom** (up 16 percent) professionals continued to witness double-digit annual growth since March 2019. In short-run as well, the job-role recorded increased growth; up one percent (month-on-month), up five percent (three-month) and up 10 percent (six-month).
- **Marketing & Communications** (up three percent) recovered positive year-on-year growth in November 2019. Growth momentum improved by six percentage points vis-à-vis last month. The job-role also exhibited increased demand on month-on-month (up four percent) and three-month (up three percent) basis.
- **HR & Admin** professionals experienced two percent hike in online demand from the year-ago level. Moreover, the occupation category registered four percent growth on-the-month.
- **Engineering /Production, Real Estate** (down five percent) registered the steepest decline, on-the-year.

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%
Marketing & Communications	77	79	3%

Lowest Growth Occupations

Year-over-year Growth	Nov 18	Nov 19	% Growth Y-o-Y
Sales & Business Development	74	75	1%
Finance & Accounts	62	60	-3%
Purchase/ Logistics/ Supply Chain	68	65	-4%
Engineering /Production, Real Estate	64	61	-5%

COUNTRY-WISE TRENDS

Singapore 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, Production/Manufacturing, Automotive and Ancillary matches the corresponding period a year-ago.
- Hospitality professionals record the steepest growth in online demand, on annual basis.

Singapore 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%

Singapore Lowest Growth Industries

Year-over-year Growth	Nov 18	Nov 19	% Growth Y-o-Y
Import/Export	82	86	5%
Shipping/Marine	90	92	2%
Production/Manufacturing, Automotive and Ancillary	104	104	0%

Singapore 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%

Singapore Lowest Growth Occupations

Year-over-year Growth	Nov 18	Nov 19	% Growth Y-o-Y
Legal	103	107	4%
Purchase/ Logistics/ Supply Chain	92	93	1%
Real Estate	88	86	-2%

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%

By Industry

	2018			2019									
	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
IT, Telecom/ISP and BPO/ITES	119	118	118	121	134	134	127	125	136	141	139	138	149
Engineering, Construction and Real Estate	60	59	56	55	68	62	59	54	59	56	56	56	58
BFSI	61	61	60	62	76	71	65	59	68	64	62	57	63
Production/Manufacturing, Automotive and Ancillary	90	91	88	91	95	93	89	88	91	88	88	87	89
Oil and Gas	103	98	102	103	99	106	99	102	110	116	102	98	99
Hospitality	54	56	55	58	61	63	63	59	66	71	61	58	66
Retail	40	40	35	33	55	54	47	42	48	45	45	40	45
Logistic, Courier/ Freight/ Transportation, Shipping/ Marine	61	64	63	54	80	73	68	59	71	63	59	59	58
Advertising, Market Research, Public Relations, Media and Entertainment	56	55	53	52	64	63	58	55	60	58	56	57	61

By Occupation

	2018			2019									
	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
Software, Hardware, Telecom	67	62	62	64	85	82	71	68	78	74	75	77	78
Finance & Accounts	62	61	60	60	70	67	63	59	65	61	60	56	60
Sales & Business Development	74	76	69	69	83	82	77	74	78	75	75	71	75
Customer Service	19	15	16	15	22	23	23	22	27	22	23	24	30
Marketing & Communications	77	78	75	75	84	83	79	77	80	77	76	76	79
HR & Admin	56	58	56	56	65	62	59	56	60	56	56	55	57
Engineering /Production, Real Estate	64	63	60	59	70	66	62	59	64	60	60	60	61
Hospitality & Travel	38	52	34	32	33	39	37	47	41	44	39	40	53
Purchase/ Logistics/ Supply Chain	68	71	65	64	80	76	72	65	74	69	67	66	65