

# Bayt.com Middle East Consumer Confidence Index

March 2015





Section 1

# PROJECT BACKGROUND

# Objectives

- To understand perceptions and attitudes of consumers in the Middle East regarding the economy of their countries, their personal financial and job situation, their likelihood to purchase and invest, and the job market in general.

# Project Background

- Consumer confidence is a measure of the economic wellbeing of a country.
- It is a reflection of consumer satisfaction levels and expectations based on various factors in the economy, i.e. inflation, stock market performance, job opportunities, salary structures, unemployment, investment avenues and returns, business growth, state economic policies, infrastructure, cost of living, interest rates, exchange rates, etc.
- Such consumer satisfaction levels and expectations will have an effect on economic variables.
- For example, if consumers are positive about the economy and have disposable income levels that are perceived as sufficient, they will tend to spend more on consumer goods. This in turn will drive business dependent on consumer spending, thereby creating further economic growth.
- On the other hand, a pessimistic view of the economy would cause consumers to rein in their spending, creating a spending recession which could effectively cause business losses and economic downturn.



## Project Background

- Similarly, if employable adults are optimistic about job prospects and opportunities, job security, have healthy salary expectations and are hopeful about their career growth and development, it will be reflected in their attitudes towards work and the economy as a whole, as well as their spending behaviors.
- Therefore, the following trends in consumer and employee expectations could help forecast economic variables.
- This information is useful for professionals, manufacturers/business people, recruitment consultants/agencies, economists, and the general public.



Section 2

# RESEARCH METHODOLOGY



# Sample Definition

## **Age and Gender:**

Adult males and females

Aged 18+ years

## **Nationalities:**

GCC Arabs, North Africans, Levant, Western Expats and Asians

## **Country of Residence**

GCC: UAE, KSA, Kuwait, Oman, Qatar, Bahrain\*

Levant: Lebanon, Syria\*, Jordan

North Africa: Egypt, Morocco, Algeria, Tunisia

\*Small sample size

## **Data Collection**

All data was collected online. Fieldwork was done between January 19-31, 2015. The total number of respondents achieved was 4,263.



Section 3

# RESEARCH FINDINGS

## Average of Past Indices: April 2007 – October 2012

	Saudi Arabia	UAE	Kuwait	Qatar	Lebanon	Egypt	Algeria
<i>Consumer Expectancy Index (CEI)</i>	89.4	88.5	90.7	91.9	103.7	98.2	92.0
<i>Propensity to Consume (PCI)</i>	83.0	86.7	81.4	81.6	109.3	81.0	81.2
<i>Consumer Confidence Index (CCI)</i>	85.8	85.0	86.9	86.9	107.1	89.3	89.6
<i>Employee Confidence Index (ECI)</i>	84.3	80.3	84.5	84.8	99.5	89.1	89.1

## Base Period Values – March 2013

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
<b>Base:</b>	<b>16379</b>	<b>2730</b>	<b>1976</b>	<b>457</b>	<b>509</b>	<b>120</b>	<b>220</b>	<b>506</b>	<b>252</b>	<b>1700</b>	<b>5484</b>	<b>1002</b>	<b>992</b>	<b>431</b>
<i>Current Economic Scenario</i>	81.14	112.91	114.07	102.52	117.49	92.08	115.45	54.15	24.01	51.21	56.35	83.73	111.14	66.36
<i>Expected Economic Scenario</i>	89.19	103.71	112.90	104.74	116.11	101.11	111.36	67.33	43.39	66.41	77.27	93.31	98.49	88.55
<i>Employee Outlook</i>	115.50	131.06	128.61	122.90	140.93	122.96	140.61	101.43	69.21	97.40	102.88	113.26	123.41	111.53
<b>Overall Consumer Confidence</b>	285.83	347.69	355.58	330.16	374.52	316.15	367.43	222.90	136.60	215.02	236.50	290.31	333.04	266.44

# Period Values – September 2013

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
<b>Base:</b>	<b>6585</b>	<b>1097</b>	<b>717</b>	<b>151</b>	<b>183</b>	<b>78</b>	<b>141</b>	<b>210</b>	<b>145</b>	<b>669</b>	<b>1871</b>	<b>426</b>	<b>645</b>	<b>252</b>
<i>Current Economic Scenario</i>	88.47	110.16	110.74	103.64	122.40	110.90	123.05	57.86	31.72	54.04	73.81	92.37	111.78	62.70
<i>Expected Economic Scenario</i>	141.50	149.92	157.51	153.20	159.38	138.46	156.97	116.67	97.24	120.78	141.71	142.41	142.79	126.46
<i>Employee Outlook</i>	117.90	126.96	128.49	127.50	142.29	116.80	144.55	96.10	65.12	97.50	113.03	119.04	123.03	113.07
<b>Overall Consumer Confidence</b>	<b>347.87</b>	<b>387.04</b>	<b>396.74</b>	<b>384.34</b>	<b>424.08</b>	<b>366.16</b>	<b>424.57</b>	<b>270.63</b>	<b>194.08</b>	<b>272.31</b>	<b>328.54</b>	<b>353.82</b>	<b>377.60</b>	<b>302.22</b>

# Period Values – February 2014

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
<b>Base:</b>	<b>6585</b>	<b>1097</b>	<b>717</b>	<b>151</b>	<b>183</b>	<b>78</b>	<b>141</b>	<b>210</b>	<b>145</b>	<b>669</b>	<b>1871</b>	<b>426</b>	<b>645</b>	<b>252</b>
<i>Current Economic Scenario</i>	83.72	104.49	116.52	94.86	115.22	97.22	131.36	44.55	51.61	43.31	68.88	78.88	94.89	83.99
<i>Expected Economic Scenario</i>	137.21	147.12	158.60	147.03	153.62	135.19	161.52	112.32	103.94	114.55	133.39	134.22	135.31	140.38
<i>Employee Outlook</i>	113.02	124.65	138.54	129.00	139.35	107.50	139.29	89.27	63.02	89.22	99.96	107.49	117.09	118.17
<b>Overall Consumer Confidence</b>	333.95	376.27	413.66	370.89	408.19	339.91	432.16	246.14	218.58	247.09	302.23	320.59	347.29	342.54

# Last Period Values – August 2014

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
<b>Base:</b>	<b>5075</b>	<b>1090</b>	<b>847</b>	<b>187</b>	<b>230</b>	<b>69</b>	<b>65</b>	<b>158</b>	<b>63</b>	<b>377</b>	<b>1013</b>	<b>330</b>	<b>505</b>	<b>141</b>
<i>Current Economic Scenario</i>	95.06	109.86	113.16	102.14	121.30	105.07	119.23	59.18	52.38	62.47	78.04	87.27	103.27	61.35
<i>Expected Economic Scenario</i>	142.26	147.92	152.89	147.06	156.23	135.27	153.33	111.18	113.76	124.31	140.80	135.45	140.92	130.50
<i>Employee Outlook</i>	120.16	129.41	133.87	120.61	140.94	119.64	131.73	101.33	75.60	100.96	104.57	106.40	119.34	103.17
<b>Overall Consumer Confidence</b>	<b>357.49</b>	<b>387.19</b>	<b>399.93</b>	<b>369.81</b>	<b>418.47</b>	<b>359.98</b>	<b>404.29</b>	<b>271.69</b>	<b>241.73</b>	<b>287.74</b>	<b>323.40</b>	<b>329.12</b>	<b>363.53</b>	<b>295.01</b>

# Current Period Values – January 2015

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
<b>Base:</b>	<b>4263</b>	<b>819</b>	<b>495</b>	<b>135</b>	<b>131</b>	<b>94</b>	<b>107</b>	<b>189</b>	<b>54</b>	<b>234</b>	<b>1061</b>	<b>298</b>	<b>501</b>	<b>145</b>
<i>Current Economic Scenario</i>	88.63	103.11	109.80	86.67	114.50	97.34	108.41	61.38	25.93	64.96	84.21	98.15	71.26	62.76
<i>Expected Economic Scenario</i>	136.12	141.27	152.39	139.01	148.85	134.75	138.32	111.82	97.53	122.22	137.04	138.14	125.22	131.95
<i>Employee Outlook</i>	113.94	123.14	131.78	106.63	134.54	119.02	124.43	98.43	66.89	101.46	101.93	112.75	108.63	110.00
<b>Overall Consumer Confidence</b>	<b>338.70</b>	<b>367.53</b>	<b>393.97</b>	<b>332.31</b>	<b>397.89</b>	<b>351.11</b>	<b>371.15</b>	<b>271.62</b>	<b>190.35</b>	<b>288.63</b>	<b>323.18</b>	<b>349.05</b>	<b>305.11</b>	<b>304.71</b>

# Overall Indices

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
<i>Current Economic Scenario (CES)</i>	109.24	91.32	96.26	84.54	97.46	105.71	93.90	113.34	107.99	126.86	149.46	117.22	64.12	94.58
<i>Expected Economic Scenario (EES)</i>	152.62	136.21	134.97	132.72	128.20	133.27	124.20	166.08	224.80	184.04	177.35	148.04	127.14	149.01
<i>Employee Outlook (ECI)</i>	98.65	93.96	102.47	86.76	95.47	96.80	88.49	97.04	96.65	104.17	99.08	99.55	88.02	98.63
<b>Overall Consumer Confidence (CCI)</b>	118.50	105.71	110.80	100.65	106.24	111.06	101.01	121.86	139.34	134.24	136.65	120.23	91.61	114.36



Section 3a

# PERSONAL ECONOMIC SITUATION

## Summary

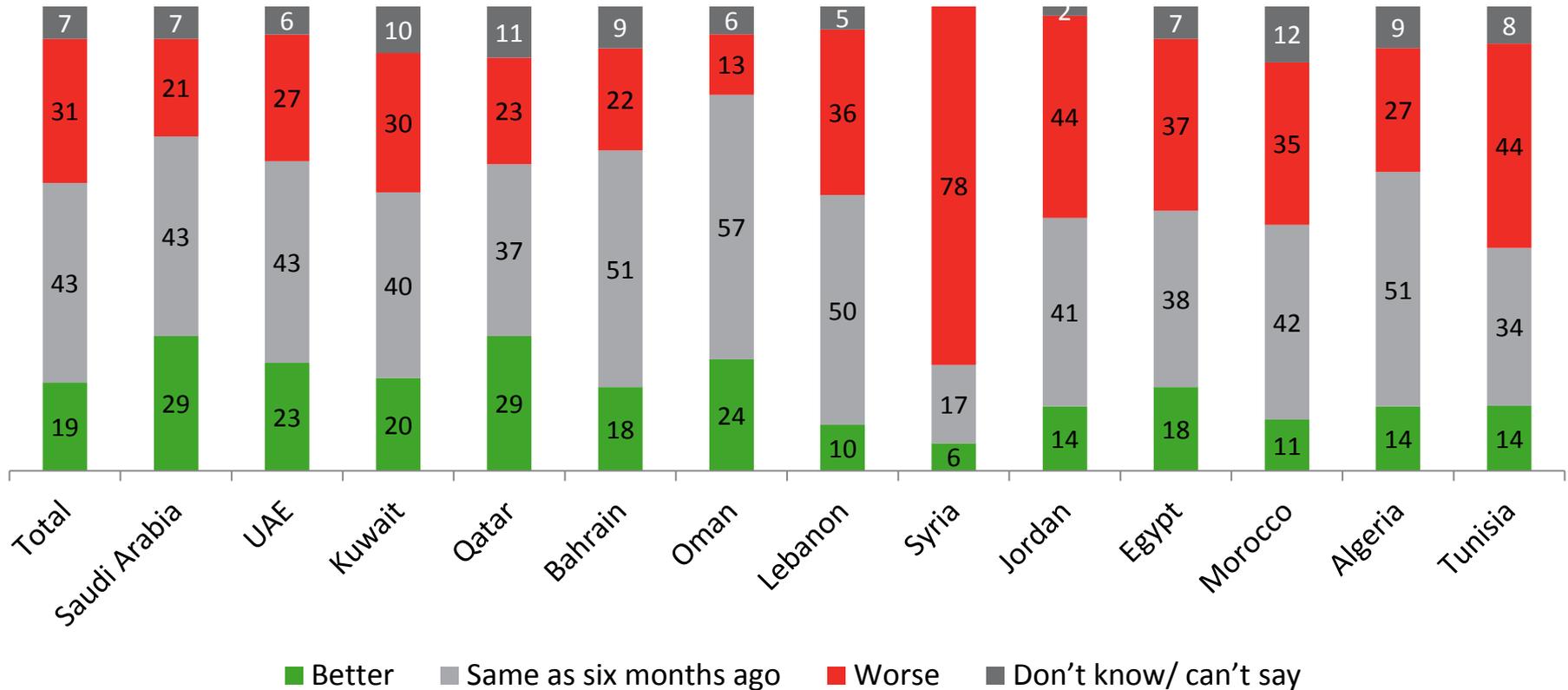
- Overall, close to a fifth (19%) believe that their financial position is better now than it was 6 months ago.
- On another positive note, four in ten (42%) expect their financial position to improve in the next 6 months. This sentiment is primarily driven by respondents in the GCC, with over half of them stating so (51%).
- Majority of respondents (73%) expect cost of living to increase in the next 6 months.
- More than half of respondents state that their savings have decreased in comparison to last year (54%). A higher proportion of respondents from Syria than respondents from other countries made this claim (78%).

## Summary

- Close to a third of respondents claim they are planning to buy a vehicle for their personal use in the next year (30%). Among those planning to buy a vehicle in the next 12 months, 46% intend to buy a new one.
- About a quarter (23%) of respondents plan to invest in property within the next year. Among those planning to invest in property, close to half (46%) intend to invest in apartments; majority intend to invest in new ones.
- Close to a quarter (23%) plan to purchase a desktop or laptop computer in the next 6 months; 18% plan to buy furniture, while 14% plan to purchase an LCD or plasma TV.

# Personal Finance – Evaluation of Current Scenario

- Overall, close to a fifth (19%) believe that their financial position is better now than it was 6 months ago.
- A larger proportion of respondents in the GCC believe that their current financial position is better (26%) as compared to respondents in Levant and North Africa (11% and 15%, respectively).
- A much higher percentage of respondents from Syria believe that their financial position is worse compared to 6 months ago, with 78% of them believing so.



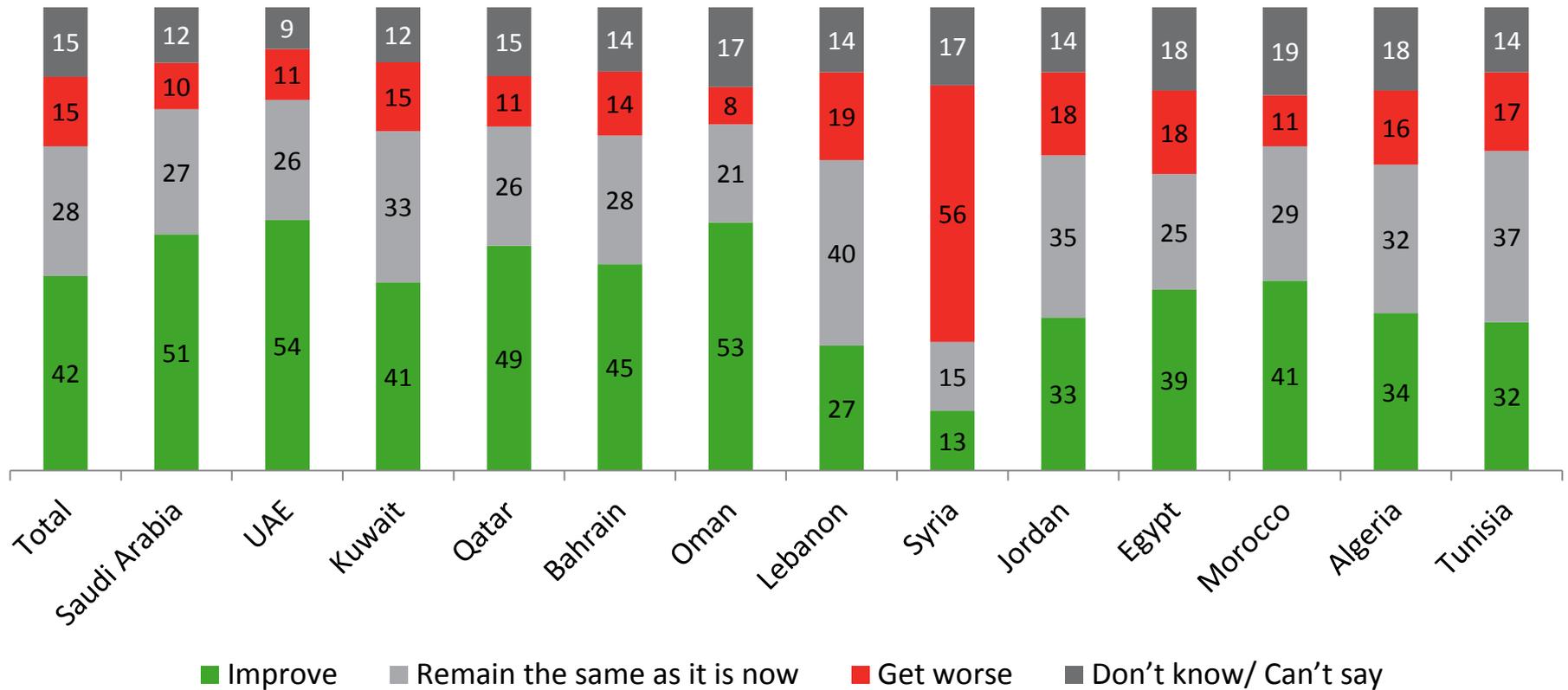
Q. Compared to 6 months ago, my or my family's current financial position is:

Base: Total (4263), KSA (819), UAE (495), Kuwait (135), Qatar (131), Bahrain (94), Oman (107), Lebanon (189), Syria (54), Jordan (234), Egypt (1061), Morocco (298), Algeria (501), Tunisia (145)

All figures are %'s

# Personal Finance – Expectations for the Future

- Over four in ten (42%) expect their financial position to improve in the next 6 months. This sentiment is primarily driven by respondents in the GCC, with over half of them stating so (51%).
- Respondents in Syria were much more pessimistic about their financial position, with over half of them (56%) expecting it to get worse.



Q. In comparison to the current period, in the next 6 months I expect my or my family's financial position to:

Base: Total (4263), KSA (819), UAE (495), Kuwait (135), Qatar (131), Bahrain (94), Oman (107), Lebanon (189), Syria (54), Jordan (234), Egypt (1061), Morocco (298), Algeria (501), Tunisia (145)

All figures are %'s

# Cost of Living

- Majority of respondents (73%) expect cost of living to increase in the next 6 months.
- More respondents from Syria and Kuwait expect cost of living to increase in the next 6 months (94% and 86%, respectively).

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
<b>Base:</b>	<b>4263</b>	<b>819</b>	<b>495</b>	<b>135</b>	<b>131</b>	<b>94</b>	<b>107</b>	<b>189</b>	<b>54</b>	<b>234</b>	<b>1061</b>	<b>298</b>	<b>501</b>	<b>145</b>
Cost of living to increase	73	65	74	86	69	64	66	57	94	79	80	57	78	78
Cost of living to remain the same	17	23	15	7	18	23	29	28	6	12	11	26	13	15
Cost of living to decrease	5	6	7	4	7	5	1	7	-	7	3	9	3	5
Don't know can't say	5	6	4	3	7	7	4	7	-	1	6	9	6	2

Q. In the next 6 months, I expect ...

All figures are %'s

# Change in Savings

- More than half (54%) state that their savings have decreased in comparison to last year, with a higher proportion of respondents from Syria making this claim (78%).
- In parallel, more respondents in GCC stated that their savings have increased (19% versus 11% for Levant and 13% for North Africa).

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
<b>Base:</b>	<b>4263</b>	<b>819</b>	<b>495</b>	<b>135</b>	<b>131</b>	<b>94</b>	<b>107</b>	<b>189</b>	<b>54</b>	<b>234</b>	<b>1061</b>	<b>298</b>	<b>501</b>	<b>145</b>
Increased	15	22	16	11	21	11	26	11	7	12	12	11	15	13
Remained the same	26	29	28	21	32	31	34	29	13	21	24	28	26	21
Decreased	54	44	52	63	41	52	36	57	78	66	59	53	54	62
Don't know/Can't say	5	5	4	5	5	6	4	4	2	-	5	8	6	3

Q. In comparison to last year, my savings have:

All figures are %'s

# Investment in Vehicle

- About a third of respondents claim they are planning to buy a vehicle for their personal use in the next year (30%).
- Intention to purchase a vehicle is higher among respondents in Qatar and Oman (49% and 40%, respectively) and lower among respondents in Syria and Tunisia (15% and 12%, respectively).
- Among those planning to buy a vehicle in the next 12 months, 46% intend to buy a new one.

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
<b>Base:</b>	<b>4263</b>	<b>819</b>	<b>495</b>	<b>135</b>	<b>131</b>	<b>94</b>	<b>107</b>	<b>189</b>	<b>54</b>	<b>234</b>	<b>1061</b>	<b>298</b>	<b>501</b>	<b>145</b>
Yes	30	37	37	30	49	28	40	29	15	28	22	27	31	12
No	56	50	50	56	41	57	50	61	83	58	63	56	53	72
Don't know/Can't Say	14	13	13	14	10	15	10	10	2	14	15	17	16	17
<b><u>Type of Vehicle</u></b>														
<b>Base(Plan to buy):</b>	<b>1282</b>	<b>307</b>	<b>185</b>	<b>41</b>	<b>64</b>	<b>26*</b>	<b>43</b>	<b>54</b>	<b>8*</b>	<b>67</b>	<b>237</b>	<b>79</b>	<b>154</b>	<b>17*</b>
New	46	55	49	54	42	73	44	35	38	22	41	33	47	41
Used	48	40	43	46	44	23	37	59	62	70	51	63	49	59
Don't know/Can't say	6	5	8	-	14	4	19	6	-	7	7	4	5	-

*\*very small base*

Q. Do you plan to buy a vehicle for personal use in the next 12 months?

Q. Which of the following types of vehicle would it be?

All figures are %'s

# Investment in Property

- Close to a quarter (23%) plan to invest in property within the next year.
- Respondents from the GCC were more likely to make such claim (30% versus 14% for Levant and 19% for North Africa).

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
Base:	4263	819	495	135	131	94	107	189	54	234	1061	298	501	145
Yes	23	31	27	27	37	21	33	15	17	13	18	22	19	12
No	62	55	57	58	46	61	50	71	76	72	66	62	63	77
Don't know/Can't say	15	14	15	16	17	18	17	14	7	15	16	16	18	11

Q. Do you plan to invest in property within the next 12 months?

All figures are %'s

# Investment in Property – Type of Property

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
<b><u>Kind of Property</u></b>														
<b>Base(Plan to buy):</b>	<b>972</b>	<b>255</b>	<b>137</b>	<b>36</b>	<b>49</b>	<b>20</b>	<b>36</b>	<b>28</b>	<b>9</b>	<b>31</b>	<b>194</b>	<b>65</b>	<b>95</b>	<b>17</b>
Apartment	46	39	41	53	43	30	42	57	56	29	60	49	51	35
Villa/ townhouse/ bungalow	21	27	26	19	29	30	22	11	-	23	16	12	16	24
Commercial property (office/ shop etc.)	21	21	23	8	20	25	14	18	44	29	16	31	21	29
Other	12	13	10	19	8	15	22	14	-	19	7	8	13	12
<b><u>Status of Property</u></b>														
<b>Base(Plan to buy):</b>	<b>973</b>	<b>255</b>	<b>137</b>	<b>36</b>	<b>49</b>	<b>20</b>	<b>36</b>	<b>28</b>	<b>9</b>	<b>31</b>	<b>194</b>	<b>65</b>	<b>96</b>	<b>17</b>
New	55	60	57	58	55	50	58	46	22	52	59	52	48	35
Pre-owned	27	26	26	19	27	35	22	32	78	19	24	31	31	59
Don't know/Can't say	17	15	17	22	18	15	19	21	-	29	17	17	21	6

Q. What type of property are you planning to invest in?  
 Q. Which of the following types of property would it be?

All figures are %'s

# Consumer Goods

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
<b>Base:</b>	<b>4263</b>	<b>819</b>	<b>495</b>	<b>135</b>	<b>131</b>	<b>94</b>	<b>107</b>	<b>189</b>	<b>54</b>	<b>234</b>	<b>1061</b>	<b>298</b>	<b>501</b>	<b>145</b>
Desktop or Laptop	23	22	29	21	30	20	20	13	20	18	22	26	23	21
Furniture	18	20	22	15	23	17	23	13	13	17	14	22	20	14
LCD or Plasma Television	14	14	14	14	14	11	13	10	15	10	12	18	17	10
Washing Machine	10	11	10	10	11	6	11	9	6	8	5	14	15	6
Air Conditioner	10	12	8	6	15	7	14	5	11	12	10	7	13	12
Refrigerator	9	10	9	7	12	7	13	6	7	7	5	12	12	6
Digital Camera	8	8	10	7	11	11	13	4	6	4	7	11	10	4
Cooking Range	6	7	9	5	9	6	5	3	4	6	2	8	7	3
Home Theatre System	5	7	9	6	8	4	5	2	4	4	3	3	2	3
Normal or Digital Camcorder	5	6	3	2	8	1	4	2	6	3	4	7	7	5
Vacuum Cleaner	5	8	6	2	8	6	6	6	4	5	3	6	5	3
Normal Colour Television	4	4	5	4	5	2	7	2	2	1	2	7	4	3
DVD or VCD Recorder or Player	4	4	4	5	5	2	7	2	2	3	3	6	5	5
Clothes Dryer	4	6	4	4	8	5	4	4	2	3	3	6	5	5

Q. Lastly, could you please tell us which of the following are you planning to invest in within the next 6 months? (Please tick all that apply)

All figures are %'s



Section 3b

# COUNTRY'S ECONOMIC SITUATION



## Summary

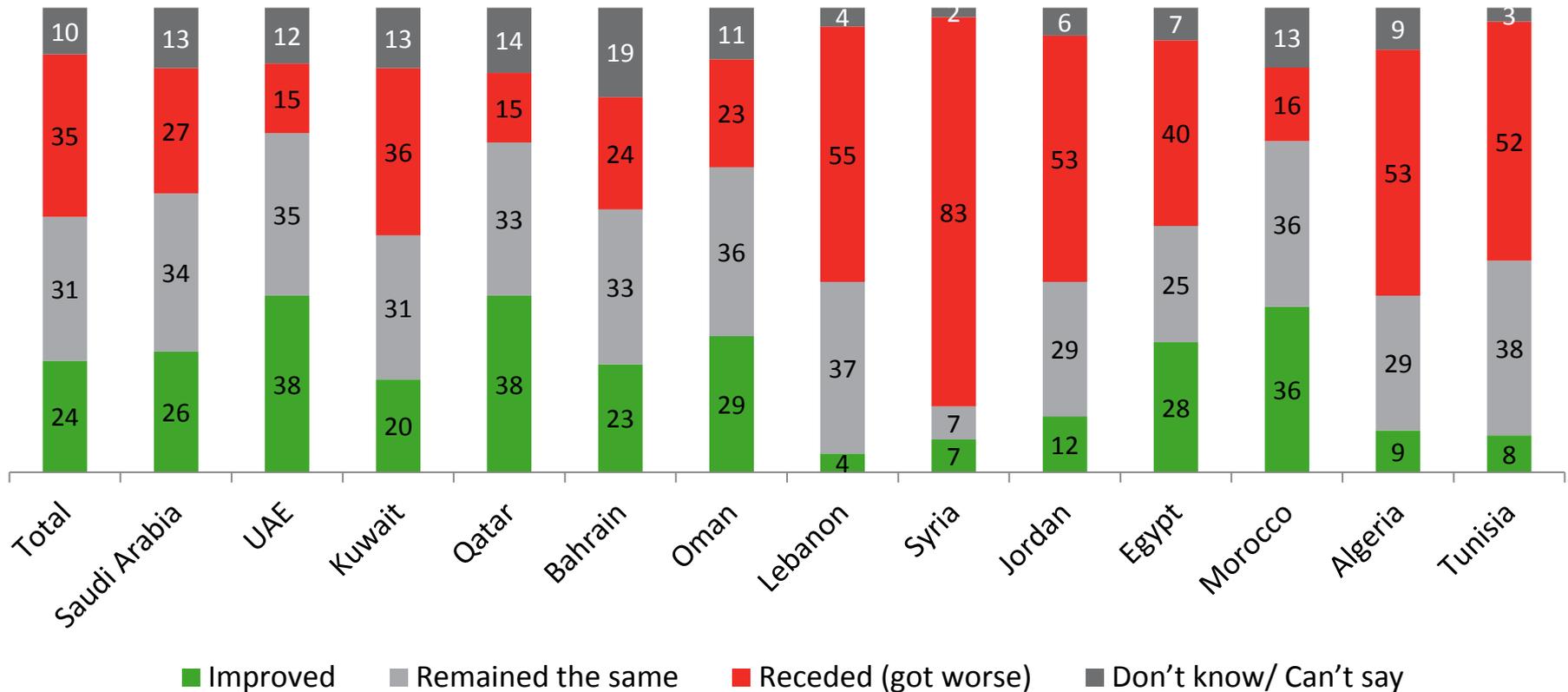
- While close to a quarter (24%) of respondents believe that their country's economy has improved relative to the past 6 months, over one third (35%) think it has gotten worse. Those in Syria were the most negative about their country's economy with 83% of them thinking it has receded as compared to 6 months prior.
- 38% of respondents expect the economy in their country to improve in the next 6 months, while a quarter expect it to get worse.
- Overall, only 7% believe that present business conditions are 'very good'; 24% think business conditions are 'good'.
- Half of respondents expect business conditions in their country to improve in the next year.
- Respondents from Syria tended to be more pessimistic about future business conditions with about half of them (49%) thinking it will get worse.

## Summary

- Close to a third (31%) believe that there are few jobs available across few industries, while a quarter state that there are few jobs available across various industries.
- About one third of respondents are positive about the future availability of jobs in their country with 30% of them expecting it to increase in the next 6 months.

# Country's Economy – Evaluation of Current Scenario

- While close to a quarter (24%) of respondents believe that their country's economy has improved relative to the past 6 months, over one-third (35%) think it has gotten worse.
- Respondents in Levant were less likely to see the improvement (9% versus 30% for GCC and 23% for North Africa).
- Those from Syria were the most negative about their country's economy with 83% of them thinking it has receded as compared to 6 months prior.



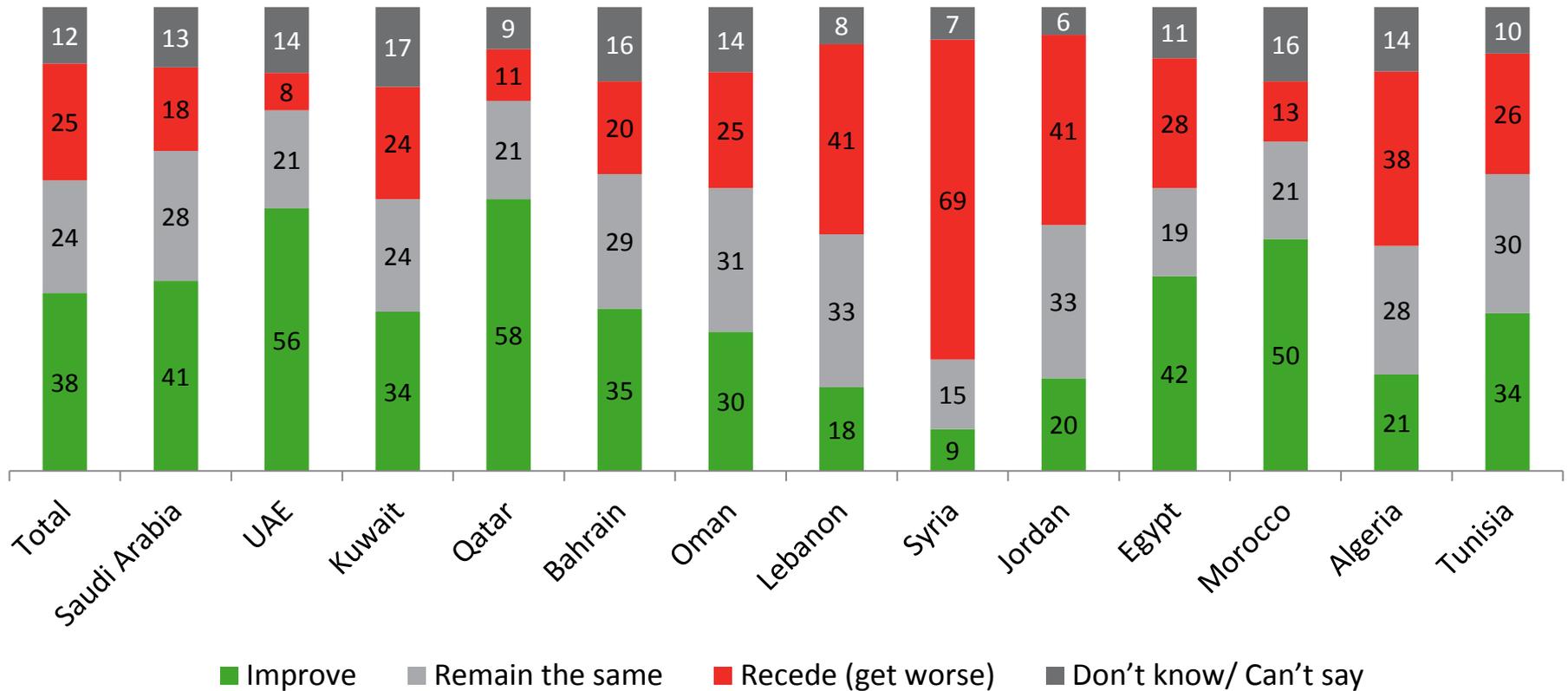
Q. Compared to 6 months earlier, my country of residence's economy has:

Base: Total (4263), KSA (819), UAE (495), Kuwait (135), Qatar (131), Bahrain (94), Oman (107), Lebanon (189), Syria (54), Jordan (234), Egypt (1061), Morocco (298), Algeria (501), Tunisia (145)

All figures are %'s

# Country's Economy – Expectations for the Future

- 38% expect the economy in their country to improve in the next 6 months, while 25% expect it to get worse.
- Those from the Levant region were also less likely to expect an improvement in their country's economy (18% versus 45% for GCC and 37% for North Africa).
- In line with earlier findings, respondents in Syria tended to be more pessimistic with 69% of them believing that their country's economy will get worse in the next 6 months.



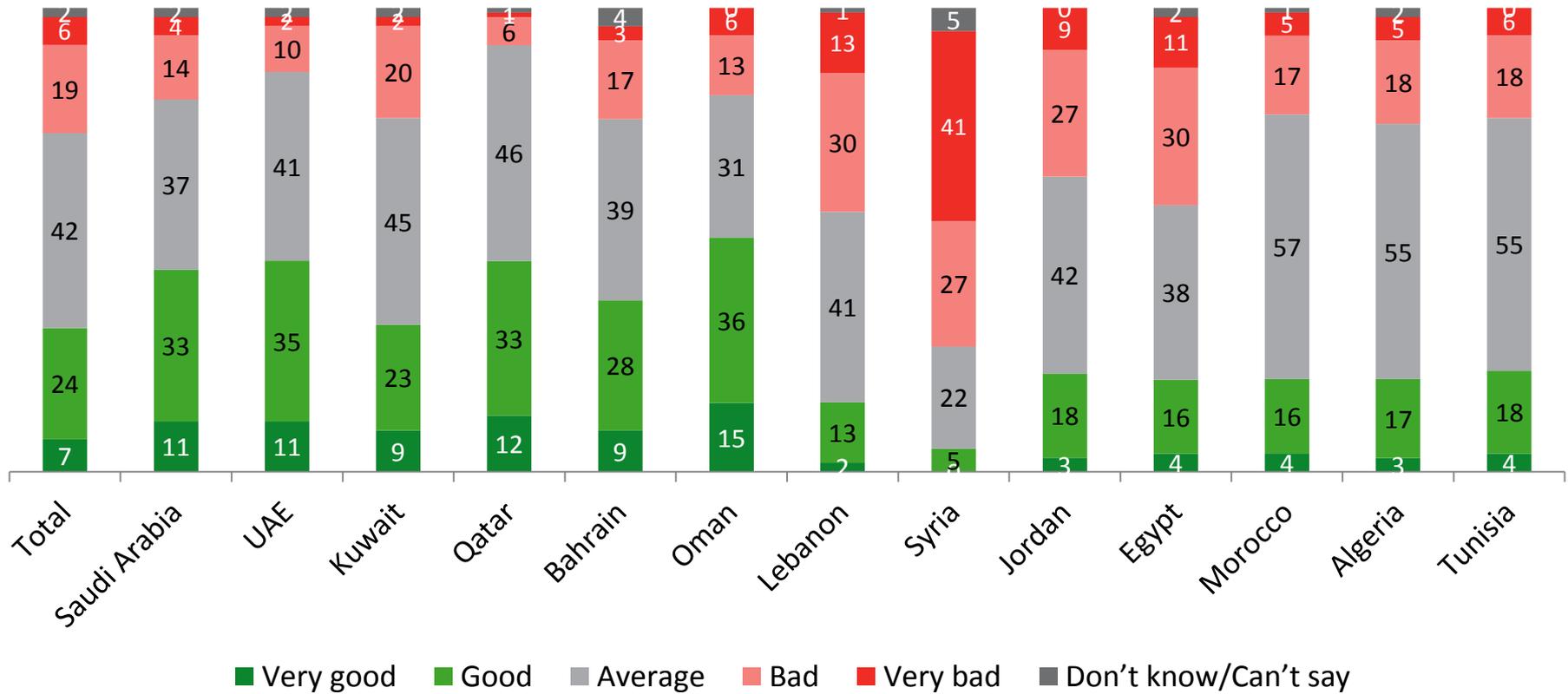
Q. In comparison to the current period, in the next 6 months I expect the economy in my country of residence to :

Base: Total (4263), KSA (819), UAE (495), Kuwait (135), Qatar (131), Bahrain (94), Oman (107), Lebanon (189), Syria (54), Jordan (234), Egypt (1061), Morocco (298), Algeria (501), Tunisia (145)

All figures are %'s

# Present Business Conditions

- Only 7% believe that present business conditions are very good while 24% think business conditions are good.
- A higher proportion of respondents from GCC had a positive feedback (very good: 11%, good: 33%) in comparison to respondents from Levant (very good: 3%, good: 15%) and North Africa (very good: 4%, good: 16%).
- A much higher percentage of Syria residents consider the present business conditions to be very bad (41%).



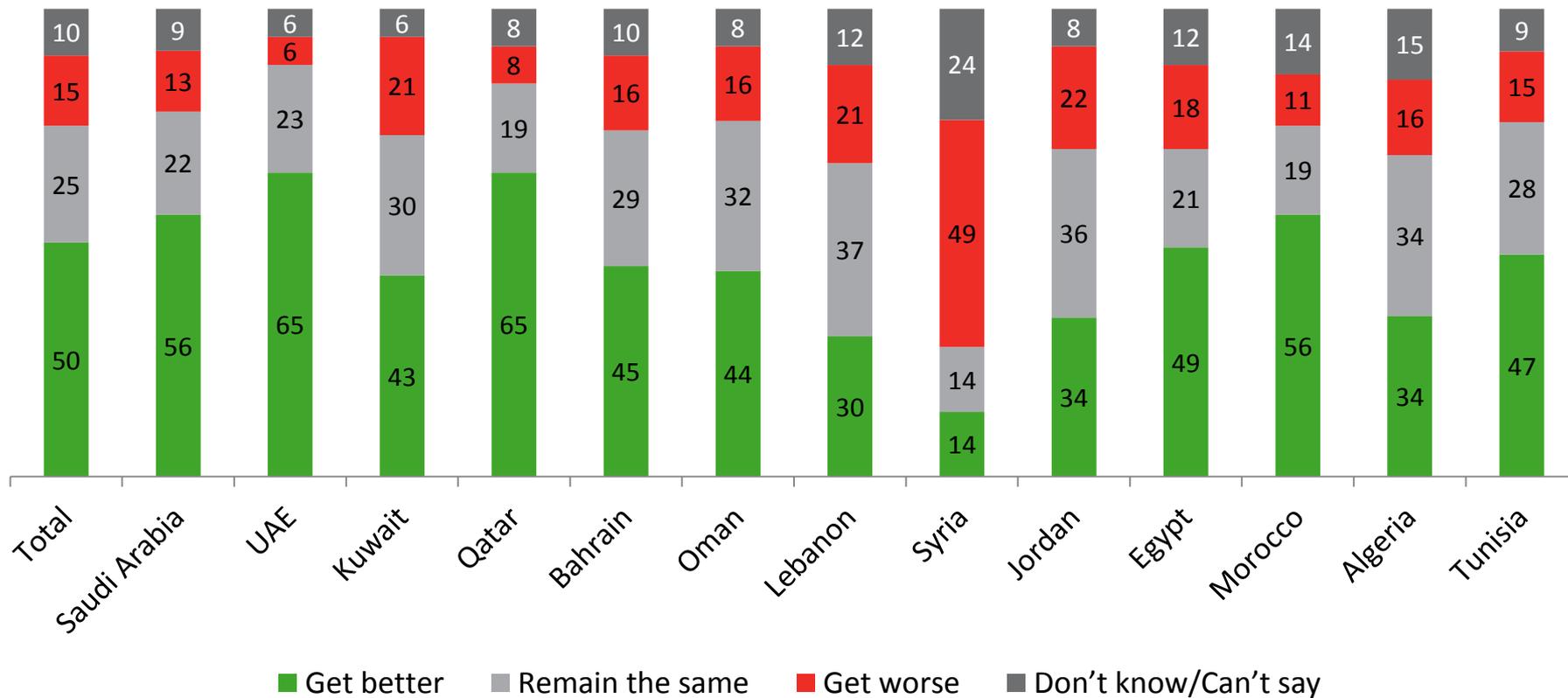
Q. Overall, presently the business conditions are...

Base: Those employed(2914), KSA (660), UAE (411), Kuwait (115), Qatar (97), Bahrain (69), Oman (87), Lebanon (135), Syria (37), Jordan (146), Egypt (680), Morocco (101), Algeria (291), Tunisia (85)

All figures are %'s

# Expectations of Future Business Conditions

- Half of respondents expect the business conditions to improve in the next year.
- Majority of respondents in the GCC have this positive outlook (57%); 30% in Levant and 46% in North Africa.
- Respondents in Syria tended to be more pessimistic about future business conditions with about half of them (49%) thinking it will get worse.



Q. In a year's time, I expect the business conditions to:

Base: Those employed(2914), KSA (660), UAE (411), Kuwait (115), Qatar (97), Bahrain (69), Oman (87), Lebanon (135), Syria (37), Jordan (146), Egypt (680), Morocco (101), Algeria (291), Tunisia (85)

All figures are %'s

# Current Availability of Jobs

- Close to a third (31%) believe that there are few jobs available across few industries while a quarter state that there are few jobs available across various industries.
- More respondents in GCC believe that there are plenty of jobs available (24% across various industries; 24% across a few industries only) as compared to Levant (4% across various industries; 12% across a few industries only) and North Africa (8% across various industries; 17% across a few industries only).

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
<b>Base:</b>	<b>4263</b>	<b>819</b>	<b>495</b>	<b>135</b>	<b>131</b>	<b>94</b>	<b>107</b>	<b>189</b>	<b>54</b>	<b>234</b>	<b>1061</b>	<b>298</b>	<b>501</b>	<b>145</b>
There are plenty of jobs available across various industries	14	26	25	15	33	16	21	4	4	3	9	9	8	3
There are plenty of jobs available but across a few industries only	19	26	24	16	28	12	17	12	6	13	17	20	17	10
There are few jobs available across various industries	25	20	24	36	14	16	22	33	19	35	24	27	28	28
There are few jobs available across few industries	31	16	14	24	12	37	23	43	67	43	41	32	40	53
Don't know/Can't say	10	12	13	10	13	19	16	7	6	5	9	12	7	7

Q. Which of the following best describes your opinion on the current availability of jobs in your country of residence:

All figures are %'s

# Future Availability of Jobs

- Overall, about one third of respondents are positive about the future availability of jobs in their country with 30% of them expecting it to increase in the next 6 months.
- Those from Qatar were the most positive about it (59%), followed by those from UAE (42%) and Saudi (36%).
- In contrast, more of those from Levant said they expect that the number of jobs to decrease (39%), as compared to respondents from GCC (16%) and North Africa (27%).

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
<b>Base:</b>	<b>4263</b>	<b>819</b>	<b>495</b>	<b>135</b>	<b>131</b>	<b>94</b>	<b>107</b>	<b>189</b>	<b>54</b>	<b>234</b>	<b>1061</b>	<b>298</b>	<b>501</b>	<b>145</b>
Increase	30	36	42	23	59	24	26	12	13	15	33	34	12	23
Remain the same	30	32	27	33	18	34	33	36	26	36	28	27	32	37
Decrease	24	16	13	24	10	21	25	37	52	37	24	16	41	23
Don't know/Can't say	16	16	18	21	13	20	16	15	9	12	16	23	14	17

Q. In the next 6 months, the number of jobs available in my country of residence will...

All figures are %'s



Section 3c

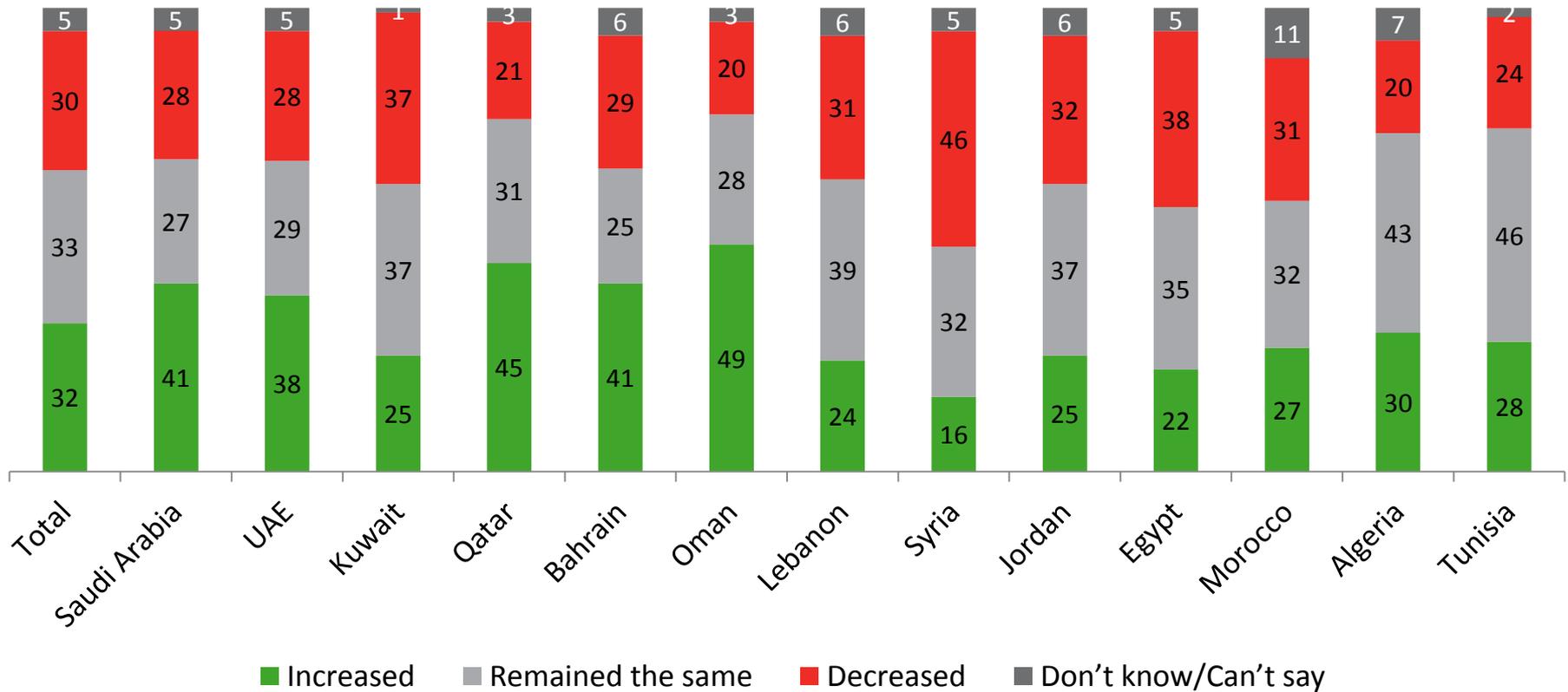
# CURRENT JOB

## Summary

- Close to a third (32%) state that the number of employees in their organization has increased in comparison to the last 6 months.
- Overall, over one third (36%) expect the number of employees in their organization to increase in the next 6 months. 43% of GCC residents have this positive outlook regarding their company size, a percentage that is much higher than those of Levant and North Africa residents (both 28%).
- At least two fifths of employed respondents were satisfied with their career growth opportunities, job security and non-monetary benefits (40%, 41% and 43%, respectively).
- On the other hand, close to half of employed respondents across the region were dissatisfied with their current compensation (46%).

# Change in Number of Employees

- Close to a third (32%) state that the number of employees in their organization has increased in comparison to 6 months ago.
- A higher proportion of GCC residents (40%) claim that this number has increased as compared to Levant (24%) and North Africa (25%).



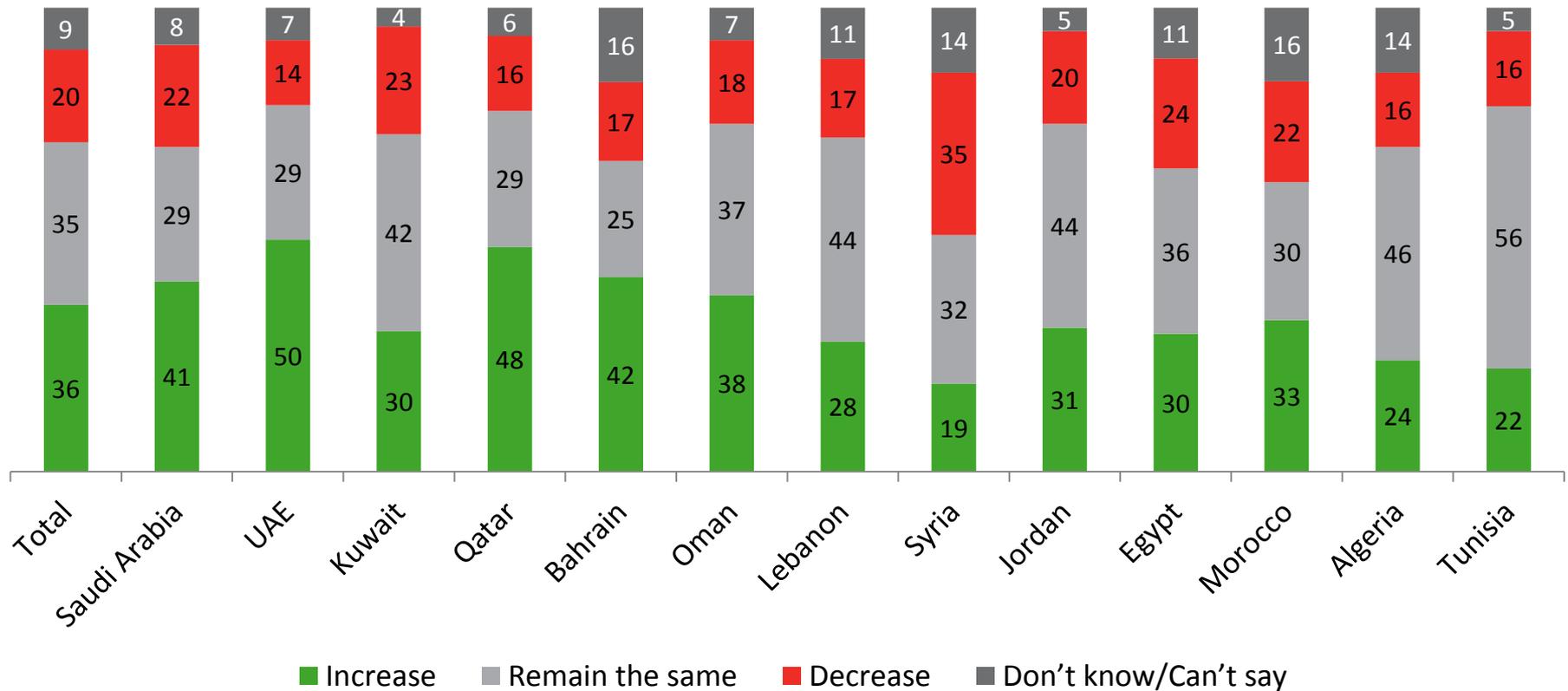
Q. In comparison to 6 months ago, the number of employees in the organization where I work has:

Base: Those employed(2914), KSA (660), UAE (411), Kuwait (115), Qatar (97), Bahrain (69), Oman (87), Lebanon (135), Syria (37), Jordan (146), Egypt (680), Morocco (101), Algeria (291), Tunisia (85)

All figures are %'s

# Expected Change in Number of Employees

- Overall, over one third (36%) expect the number of employees in their organization to increase in the next 6 months.
- 43% of GCC residents have this positive outlook regarding their company size, a percentage that is much higher than those of Levant and North Africa residents (both 28%).



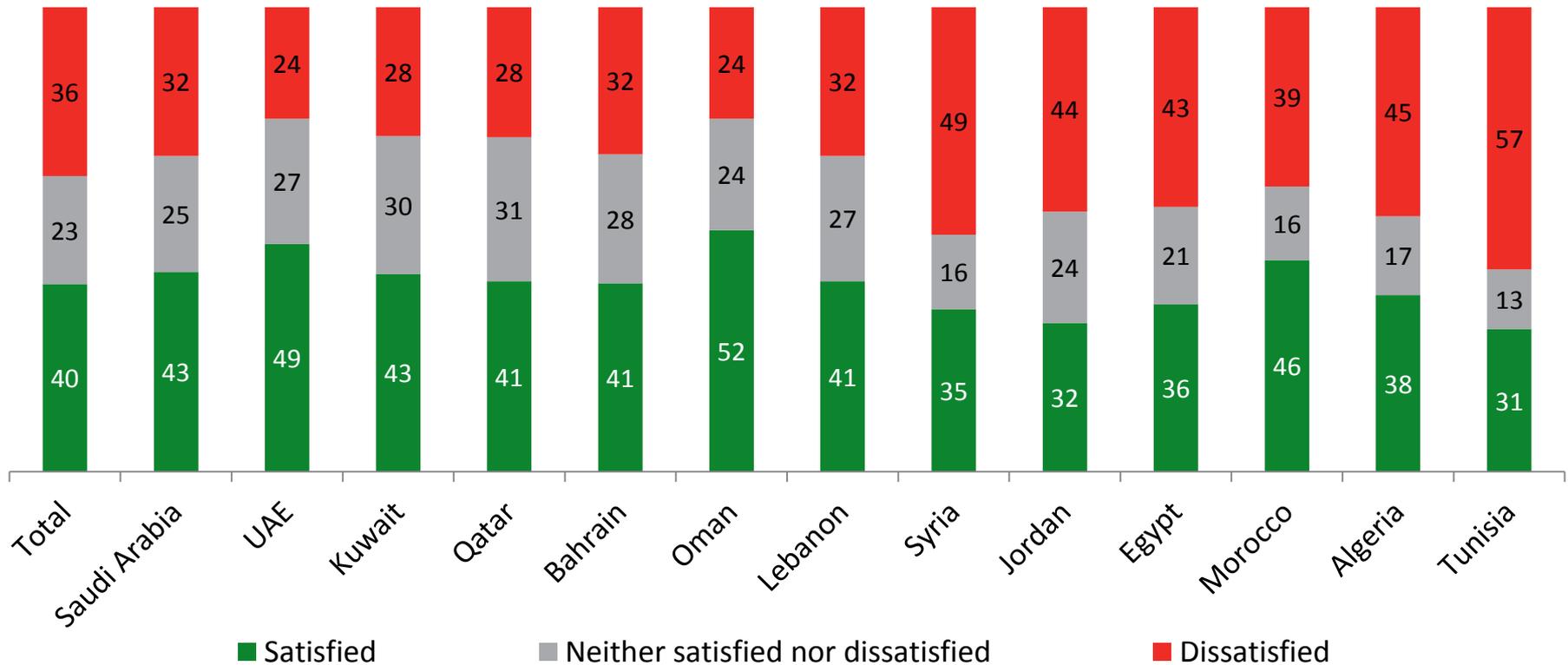
Q. In the next 6 months, I expect the number of employees in my organization to:

Base: Those employed(2914), KSA (660), UAE (411), Kuwait (115), Qatar (97), Bahrain (69), Oman (87), Lebanon (135), Syria (37), Jordan (146), Egypt (680), Morocco (101), Algeria (291), Tunisia (85)

All figures are %'s

# Satisfaction Levels: Career Growth Opportunities

- Two-fifths of employed respondents are satisfied with the career growth opportunities in their current job.
- Respondents from Oman, UAE and Morocco tend to be happier in this regard with 52% in Oman, 49% in the UAE and 46% in Morocco expressing their satisfaction.
- Levant and North Africa residents were more dissatisfied about their career growth opportunities (40% and 44%, respectively) in comparison to GCC residents (29%).



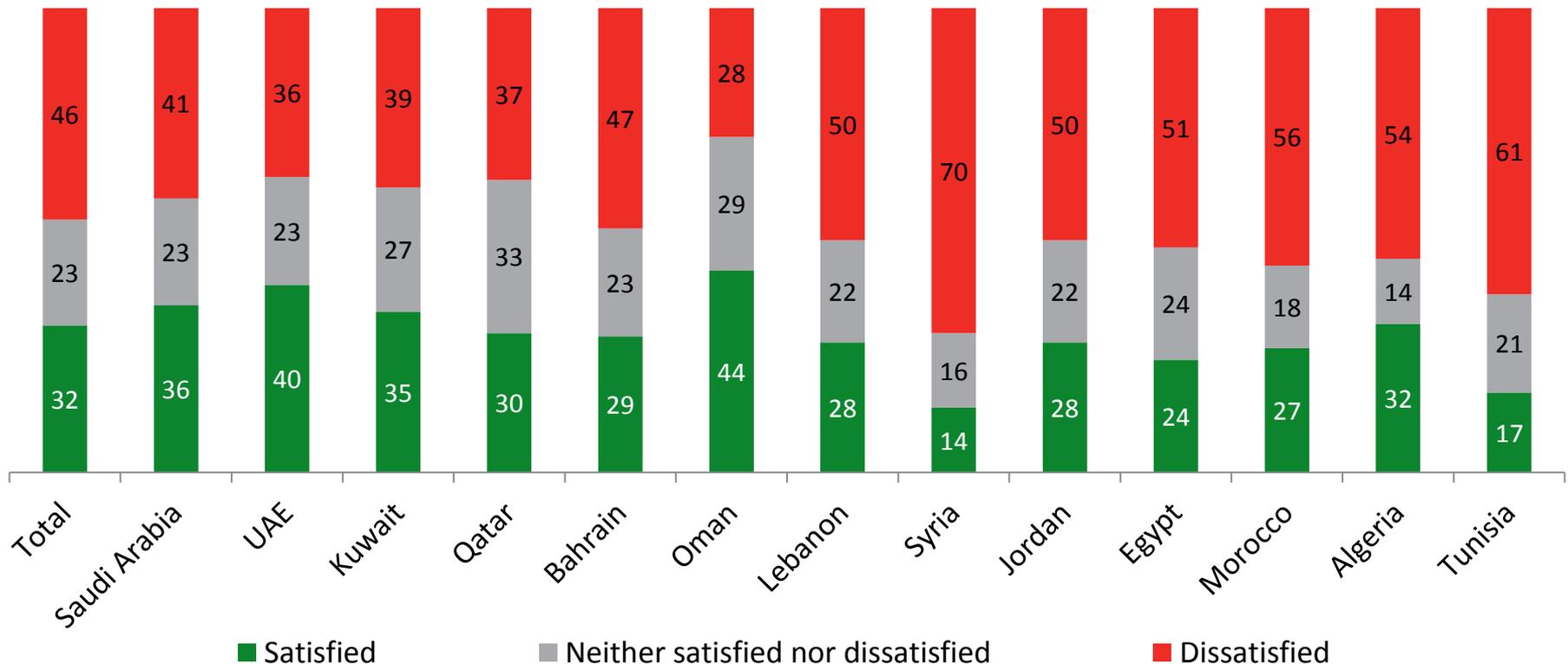
Q. On an overall level, how satisfied are you with the following attributes related to your job?

Base: Those employed(2914), KSA (660), UAE (411), Kuwait (115), Qatar (97), Bahrain (69), Oman (87), Lebanon (135), Syria (37), Jordan (146), Egypt (680), Morocco (101), Algeria (291), Tunisia (85)

All figures are %'s

# Satisfaction Levels: Current Compensation (Salary & Allowances)

- Close to half of employed respondents are dissatisfied about their current compensation (46%).
- Dissatisfaction levels tend to be higher among residents of Levant and North Africa (52% and 53%, respectively versus 39% for GCC).
- Respondents in Syria are the most unhappy about the compensation given in their current jobs (70%), followed by Tunisia (61%).



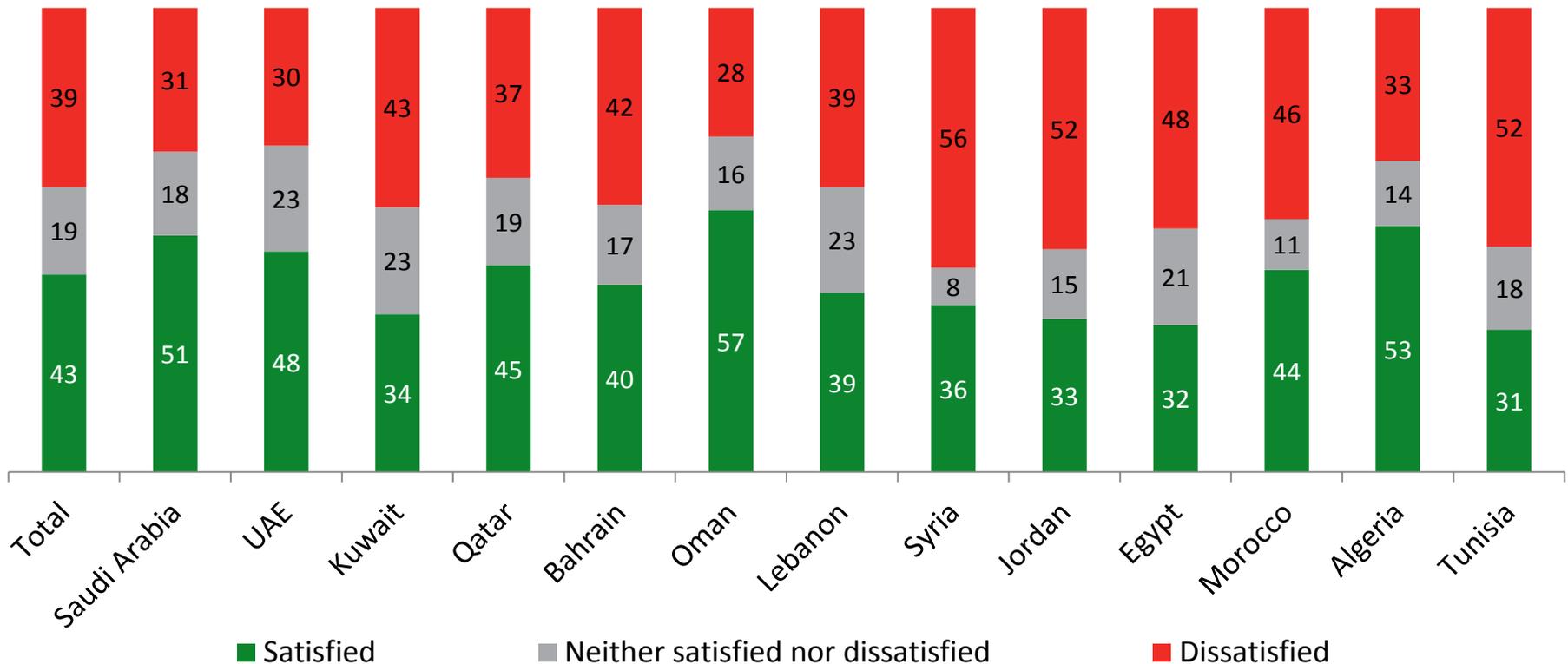
Q. On an overall level, how satisfied are you with the following attributes related to your job?

Base: Those employed(2914), KSA (660), UAE (411), Kuwait (115), Qatar (97), Bahrain (69), Oman (87), Lebanon (135), Syria (37), Jordan (146), Egypt (680), Morocco (101), Algeria (291), Tunisia (85)

All figures are %'s

# Satisfaction Levels: Non-monetary Benefits

- Over two fifths (43%) are satisfied with the non-monetary benefits they receive at their current job.
- GCC nationals were more satisfied in this aspect (49% versus 35% for Levant and 37% for North Africa).
- Oman, Algeria and Saudi residents tended to be happier in terms of the non-monetary benefits with the majority of them being satisfied (57%, 53% and 51% respectively).



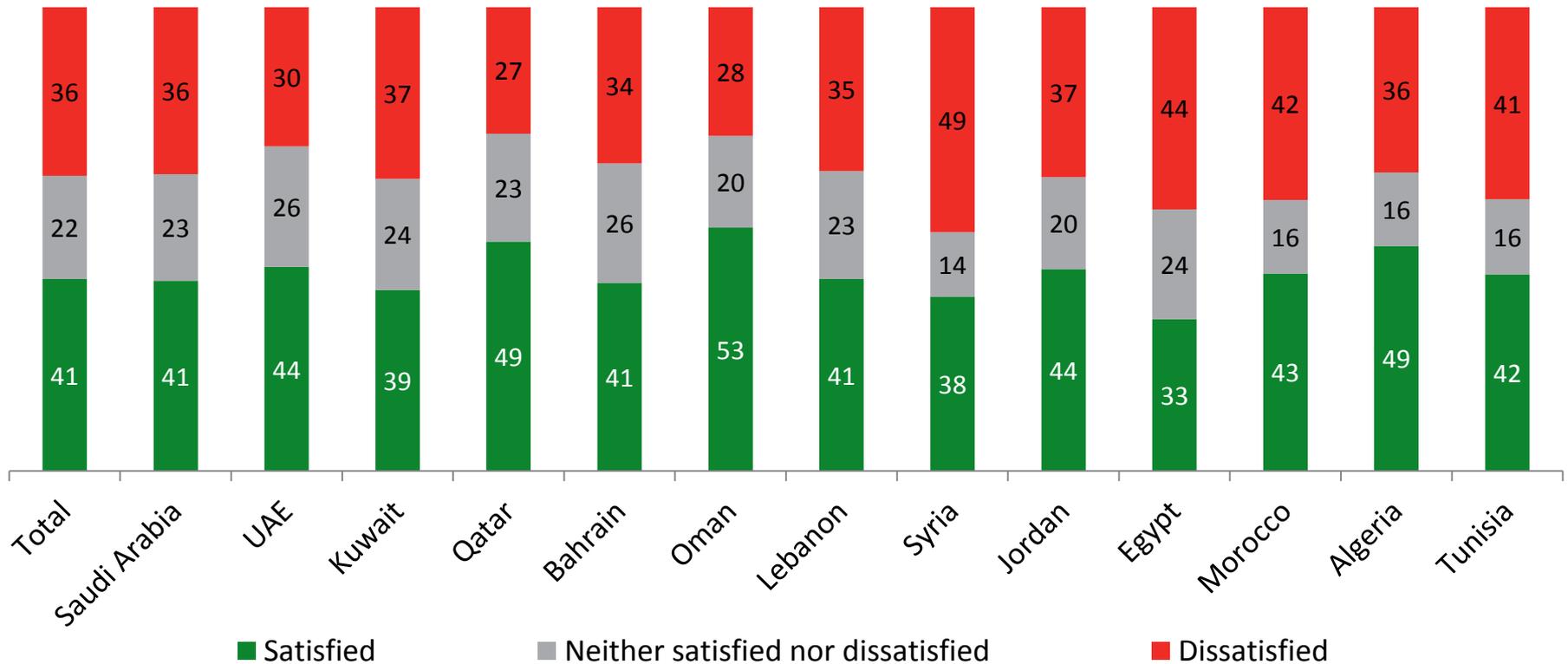
Q. On an overall level, how satisfied are you with the following attributes related to your job?

Base: Those employed(2914), KSA (660), UAE (411), Kuwait (115), Qatar (97), Bahrain (69), Oman (87), Lebanon (135), Syria (37), Jordan (146), Egypt (680), Morocco (101), Algeria (291), Tunisia (85)

All figures are %'s

# Satisfaction Levels: Job Security

- 2 in every 5 respondents (41%) were satisfied with their job security.
- Satisfaction with job security is highest in Oman, Algeria and Qatar.
- A higher proportion of residents from Syria are unhappy about their job security (49%).



Q. On an overall level, how satisfied are you with the following attributes related to your job?

Base: Those employed(2914), KSA (660), UAE (411), Kuwait (115), Qatar (97), Bahrain (69), Oman (87), Lebanon (135), Syria (37), Jordan (146), Egypt (680), Morocco (101), Algeria (291), Tunisia (85)

All figures are %'s

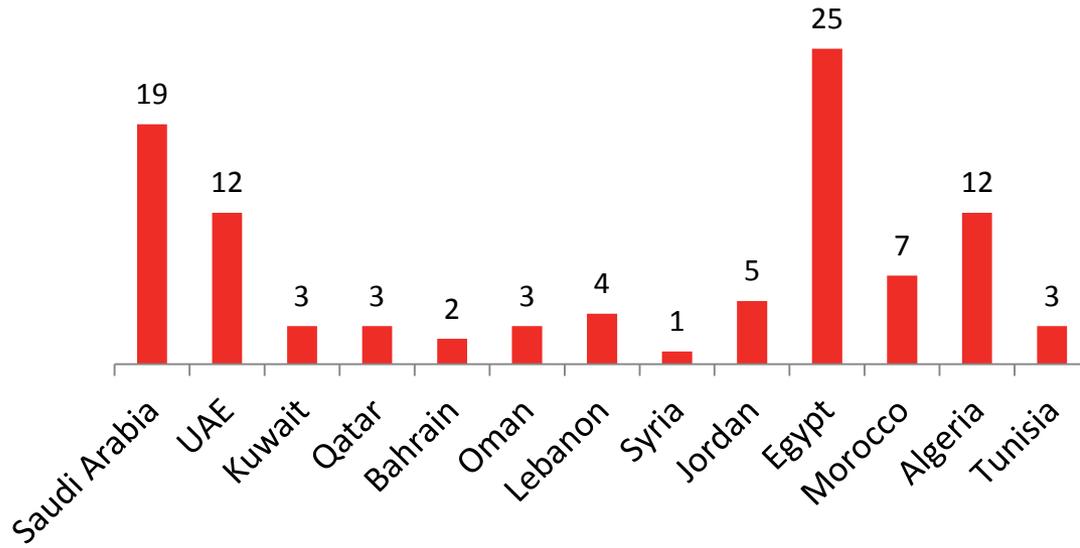


Section 4

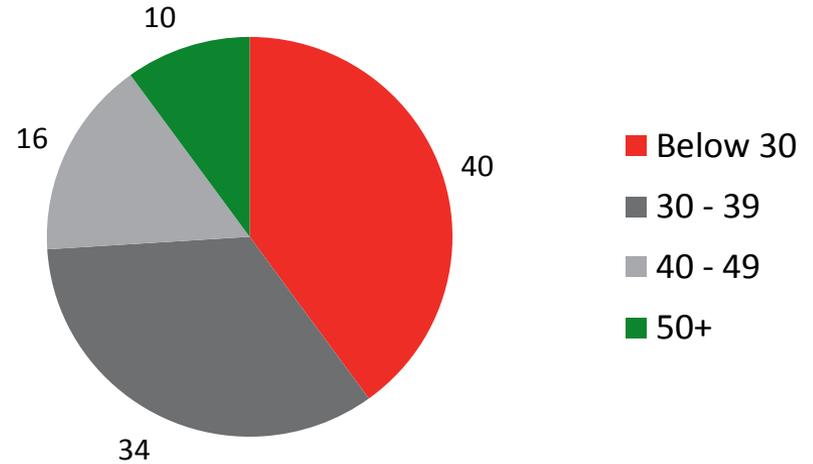
# DEMOGRAPHICS

# Respondent Profile 1/4 – Personal

### Country of Residence



### Age Groups

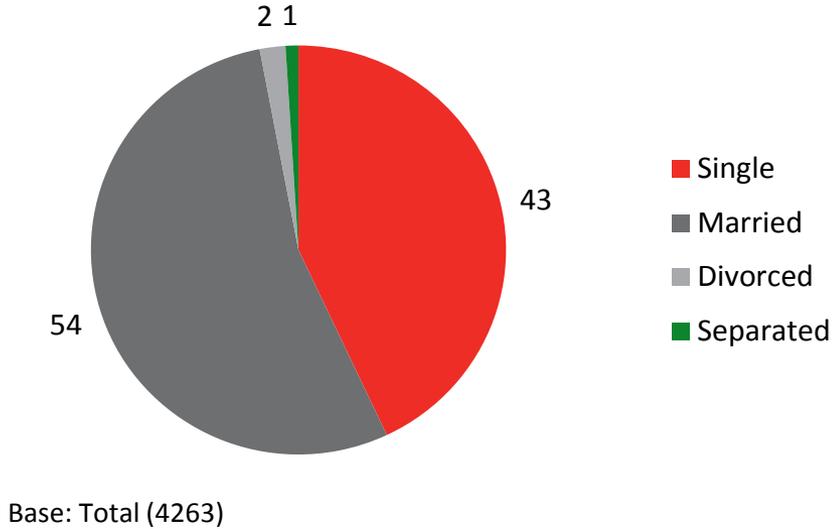


Base: Total (4,263)

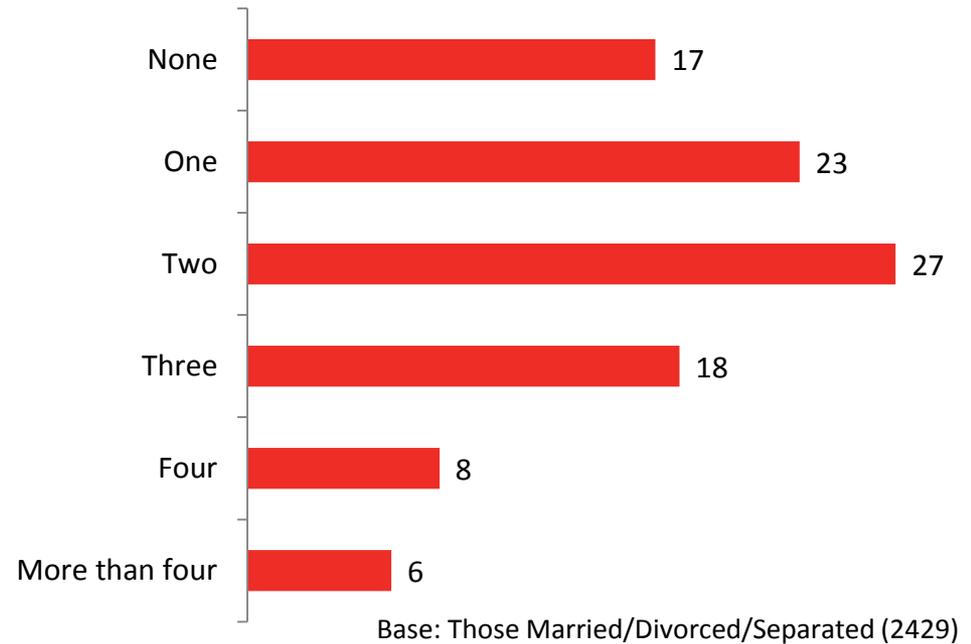
All figures are %'s

# Respondent Profile 2/4 – Personal

### Marital Status

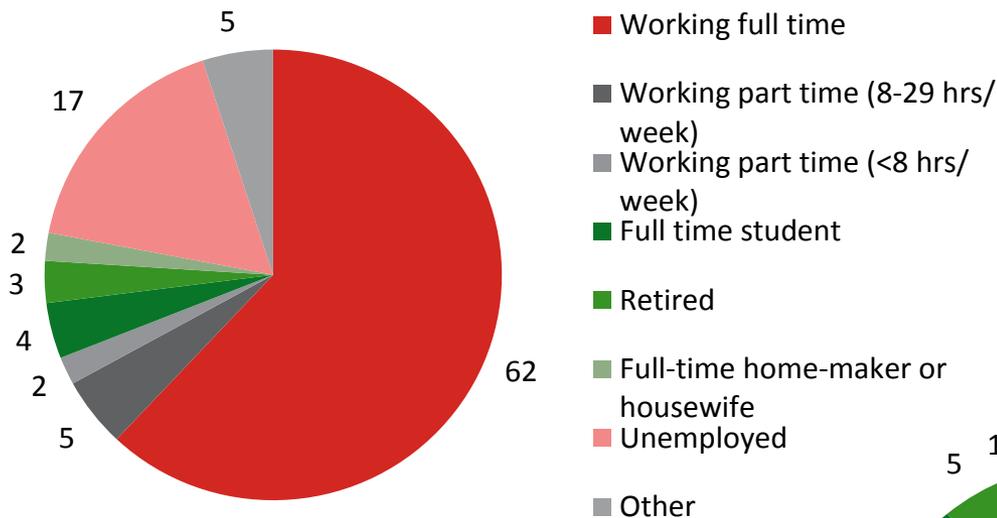


### No. of children



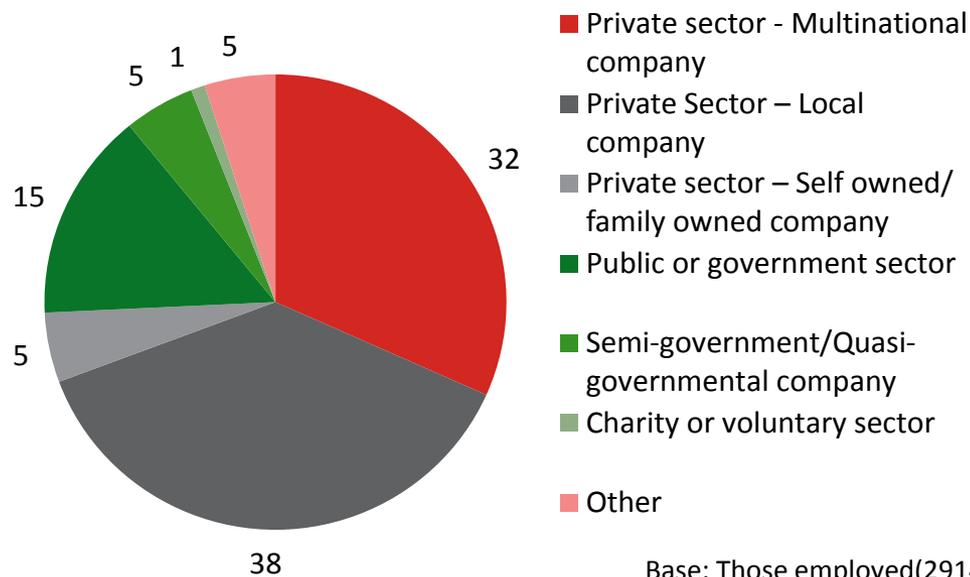
# Respondent Profile 3/4 – Professional

## Work Status



Base: Total (4263)

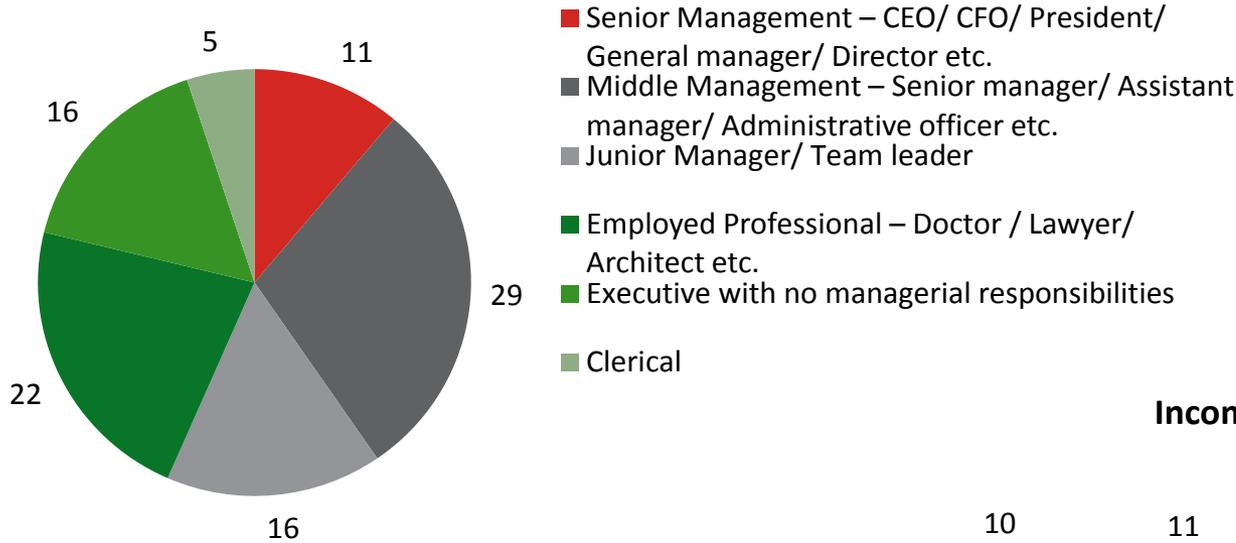
## Sector



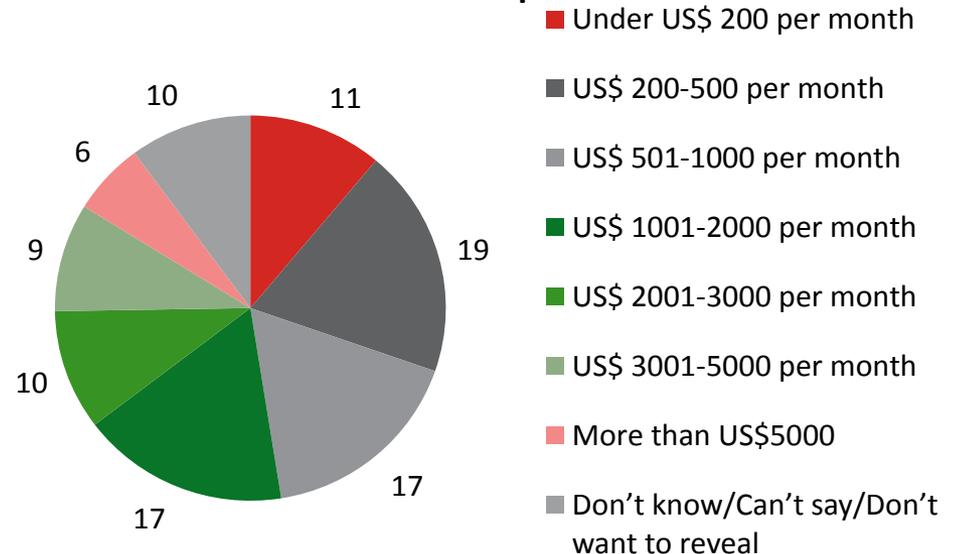
Base: Those employed(2914)

# Respondent Profile 4/4 – Professional

## Seniority



## Income Group



Base: Those employed (2914)

All figures are %'s

**Thank you**

