

Bayt.com Middle East Consumer Confidence Index

September 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 July 27 – August 2, 2015. The total number of respondents achieved was 8,882.

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
Base:	16379	2730	1976	457	509	120	220	506	252	1700	5484	1002	992	431
<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
Overall Consumer Confidence	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
Base:	6585	1097	717	151	183	78	141	210	145	669	1871	426	645	252
<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
Overall Consumer Confidence	347.87	387.04	396.74	384.34	424.08	366.16	424.57	270.63	194.08	272.31	328.54	353.82	377.60	302.22

Period Values – February 2014

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
Base:	6585	1097	717	151	183	78	141	210	145	669	1871	426	645	252
<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
Overall Consumer Confidence	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

Period Values – August 2014

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
Base:	5075	1090	847	187	230	69	65	158	63	377	1013	330	505	141
<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
Overall Consumer Confidence	357.49	387.19	399.93	369.81	418.47	359.98	404.29	271.69	241.73	287.74	323.40	329.12	363.53	295.01

Last Period Values – January 2015

	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
<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
Overall Consumer Confidence	338.70	367.53	393.97	332.31	397.89	351.11	371.15	271.62	190.35	288.63	323.18	349.05	305.11	304.71

Current Period Values – July 2015

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
Base:	8882	1748	1011	264	255	114	144	231	63	703	2118	733	1135	363
<i>Current Economic Scenario</i>	93.01	111.04	114.94	102.84	114.71	99.12	118.75	46.75	34.13	69.35	90.30	91.68	80.22	54.68
<i>Expected Economic Scenario</i>	140.73	147.10	156.81	150.13	156.73	142.11	150.69	109.38	104.23	126.03	144.13	139.15	127.37	122.68
<i>Employee Outlook</i>	114.90	127.13	136.19	122.94	136.83	109.29	136.69	81.08	71.32	86.91	104.39	111.62	105.70	93.04
Overall Consumer Confidence	348.65	385.27	407.94	375.90	408.27	350.52	406.13	237.21	209.68	282.29	338.82	342.45	313.29	270.40

Overall Indices

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
<i>Current Economic Scenario (CES)</i>	114.63	98.34	100.76	100.32	97.63	107.64	102.85	86.34	142.15	135.43	160.26	109.49	72.18	82.41
<i>Expected Economic Scenario (EES)</i>	157.78	141.84	138.89	143.33	134.99	140.54	135.32	162.46	240.24	189.77	186.52	149.13	129.33	138.54
<i>Employee Outlook (ECI)</i>	99.48	97.00	105.90	100.03	97.09	88.88	97.21	79.94	103.06	89.23	101.47	98.55	85.65	83.42
Overall Consumer Confidence (CCI)	121.98	110.81	114.72	113.86	109.01	110.87	110.54	106.42	153.50	131.29	143.26	117.96	94.07	101.49

Section 3a

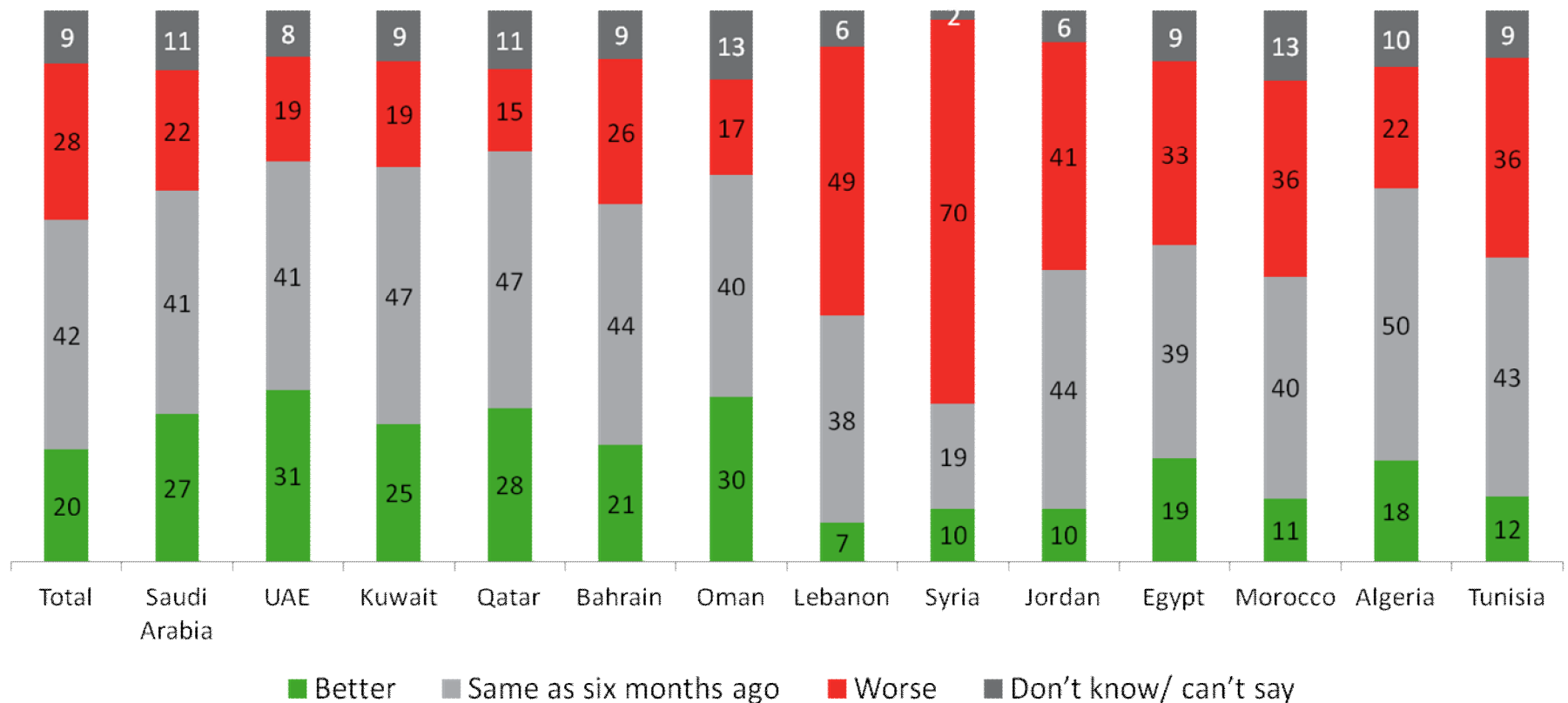
PERSONAL ECONOMIC SITUATION

Summary

- One-fifth (20%) believe that their financial position is better now than it was 6 months ago.
- Just over two-fifths (43%) 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 (54%).
- Majority of respondents (73%) expect cost of living to increase in the next 6 months, regardless of region of residence.
- About 1 in 2 state that their savings have decreased in comparison to last year, with a higher proportion of respondents from Levant making this claim (Levant: 67%, GCC: 43%, North Africa: 55%).
- Just over one-third of respondents (36%) claim they are planning to buy at least one vehicle for their personal use in the next year, with intention to purchase being higher in GCC as compared to Levant and North Africa (44%, 34% and 30% respectively).
- Over one-fifth (22%) plan to invest in property within the next year. Respondents from Levant are less likely to invest in property (12%) as compared to those from GCC and North Africa (29% and 19%, respectively).

Personal Finance – Evaluation of Current Scenario

- “ Overall, a fifth (20%) believe that their financial position is better now than it was 6 months ago.
- “ A smaller proportion of respondents in Levant believe that their current financial position is better, with only 9% of them believing so (in comparison to 28% and 17% for GCC and North Africa, respectively).
- “ Approximately 1 out of 2 respondents from Lebanon believe that their financial position is worse compared to 6 months ago.



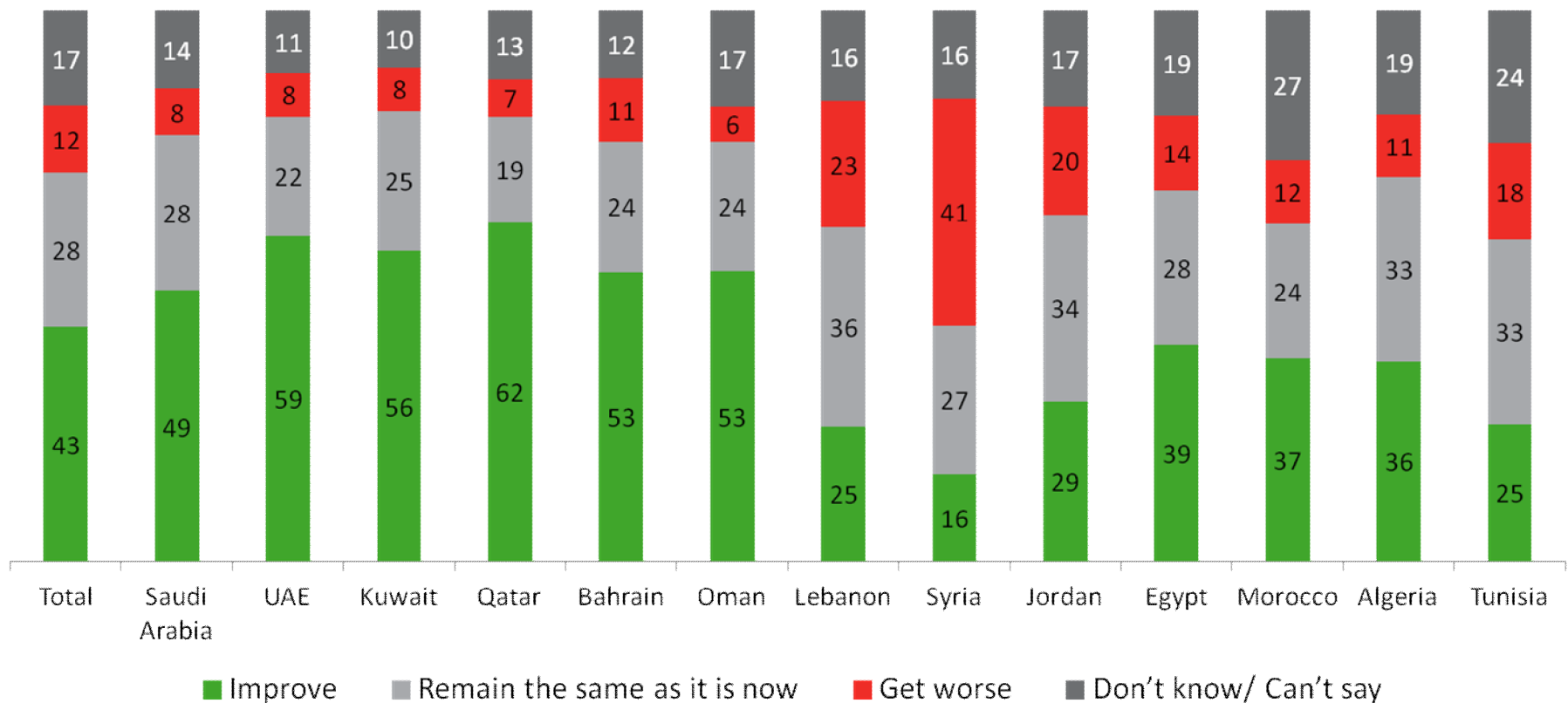
Q. Compared to 6 months ago, my or my family's current financial position is:

Base: Total (8882), KSA (1748), UAE (1011), Kuwait (264), Qatar (255), Bahrain (114), Oman (144), Lebanon (231), Syria (63), Jordan (703), Egypt (2118), Morocco (733), Algeria (1135), Tunisia (363)

All figures are %'s

Personal Finance – Expectations for the Future

- “ Just over two-fifths (43%) 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 (54%).
- “ Respondents in Lebanon and in Jordan are more pessimistic about their financial position, with 23% and 20% respectively 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 (8882), KSA (1748), UAE (1011), Kuwait (264), Qatar (255), Bahrain (114), Oman (144), Lebanon (231), Syria (63), Jordan (703), Egypt (2118), Morocco (733), Algeria (1135), Tunisia (363)

All figures are %’s

Cost of Living

“ Majority of respondents (74%) expect cost of living to increase in the next 6 months, regardless of region of residence.

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
Base:	8882	1748	1011	264	255	114	144	231	63	703	2118	733	1135	363
Cost of living to increase	74	67	76	77	65	76	64	68	87	81	80	67	72	73
Cost of living to remain the same	15	22	10	11	22	12	21	23	8	12	10	18	16	16
Cost of living to decrease	4	3	7	6	7	5	1	3	2	1	3	3	4	2
Don't know can't say	8	8	6	6	6	6	14	6	3	6	7	11	8	8

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

All figures are %'s

Change in Savings

“ About 1 in 2 state that their savings have decreased in comparison to last year, with a higher proportion of respondents from Levant making this claim (Levant: 67%, GCC: 43%, North Africa: 55%).

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
Base:	8882	1748	1011	264	255	114	144	231	63	703	2118	733	1135	363
Increased	17	21	22	15	24	18	26	10	8	9	14	15	15	12
Remained the same	27	29	30	33	33	29	33	20	13	21	26	23	28	15
Decreased	52	44	43	46	39	49	35	65	78	67	55	56	51	68
Don't know/Can't say	5	6	5	5	4	4	6	5	2	4	4	6	6	5

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

All figures are %'s

Investment in Vehicle

- “ Just over one-third of respondents (36%) claim they are planning to buy at least one vehicle for their personal use in the next year, with intention to purchase being higher in GCC as compared to Levant and North Africa (44%, 34% and 30% respectively).
- “ Among those planning to buy a vehicle in the next 12 months, 38% intend to buy a new one while 37% intend to buy a used one.

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
Base:	8882	1748	1011	264	255	114	144	231	63	703	2118	733	1135	363
Yes	36	46	43	38	49	35	44	30	10	37	29	26	38	18
No	50	43	44	46	37	51	40	56	84	49	56	56	48	69
Don't know/Can't Say	14	11	13	17	14	14	16	13	6	14	15	18	15	13
Type of Vehicle														
Base(Plan to buy):	3197	797	434	99	125	40	64	70	6*	261	620	190	426	65
New	38	48	43	32	45	40	42	17	17	18	37	25	36	25
Used	37	29	34	37	36	40	39	49	50	50	43	48	32	49
Combination of new and used	17	16	18	20	14	18	19	20	17	23	12	21	23	18
Don't know/Can't say	8	8	6	10	6	3	-	14	17	10	9	5	9	8

*very small base

Q. Do you plan to buy at least one 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

- “ Over one-fifth (22%) plan to invest in property within the next year. Respondents from Levant are less likely to invest in property (12%) as compared to those from GCC and North Africa (29% and 19%, respectively).
- “ A higher proportion of respondents from Qatar (35%) state they are planning to invest in property in the next 12 months.

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
Base:	8882	1748	1011	264	255	114	144	231	63	703	2118	733	1135	363
Yes	22	28	29	30	35	24	30	10	6	13	19	17	23	12
No	61	54	53	52	47	62	51	78	89	73	65	62	59	75
Don't know/Can't Say	17	18	17	18	17	14	19	12	5	14	16	21	17	13

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
Kind of Property														
Base(Plan to buy):	1965	484	297	80	90	27	43	24	4	90	396	122	266	42
Apartment	52	40	45	50	42	33	28	67	25	71	63	76	60	29
Villa/ townhouse/ bungalow	24	33	29	30	34	33	47	17	25	10	17	7	16	33
Commercial property (office/ shop etc.)	20	19	24	20	18	19	21	8	50	12	18	20	21	31
Other	12	17	12	14	11	26	9	13	-	10	10	3	11	17
Status of Property														
Base(Plan to buy):	1965	484	297	80	90	27	43	24	4	90	396	122	266	42
New	53	54	54	51	60	56	58	58	25	48	55	52	50	43
Pre-owned	18	17	19	15	16	11	19	17	50	20	14	22	25	17
Combination of new and pre-owned	16	17	21	20	18	19	14	17	-	14	16	13	10	26
Don't know/Can't say	13	13	7	14	7	15	9	8	25	18	15	13	16	14

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
Base:	8882	1748	1011	264	255	114	144	231	63	703	2118	733	1135	363
Tablet or Smartphone	23	22	28	22	28	22	24	13	22	17	20	27	25	25
Furniture	22	27	22	21	26	16	24	13	13	20	18	21	27	16
Desktop or Laptop	20	22	27	22	24	21	19	18	16	17	15	21	22	17
Air Conditioner	15	17	11	11	11	18	18	8	8	12	17	9	21	13
LCD or Plasma Television	14	16	14	14	19	14	15	8	8	9	12	14	17	10
Washing Machine	10	13	11	10	13	12	13	6	5	8	5	12	13	7
Refrigerator	9	13	11	9	14	11	7	6	6	6	6	11	12	6
Digital Camera	7	7	10	9	13	4	9	3	3	5	4	6	9	7
Cooking Range	6	7	8	7	9	7	10	2	5	4	3	7	9	4
Vacuum Cleaner	5	8	6	6	9	4	8	2	2	6	4	4	4	2
Home Theatre System	4	6	9	6	9	11	6	1	-	2	2	2	2	2
Clothes Dryer	4	6	5	4	5	8	7	2	2	3	1	5	4	2
Normal or Digital Camcorder	4	4	4	2	4	4	4	1	5	3	3	5	5	4
Normal Color Television	3	4	4	2	2	4	4	2	2	2	1	3	5	1
DVD or VCD Recorder or Player	3	3	3	4	5	5	5	2	-	3	1	3	2	2

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

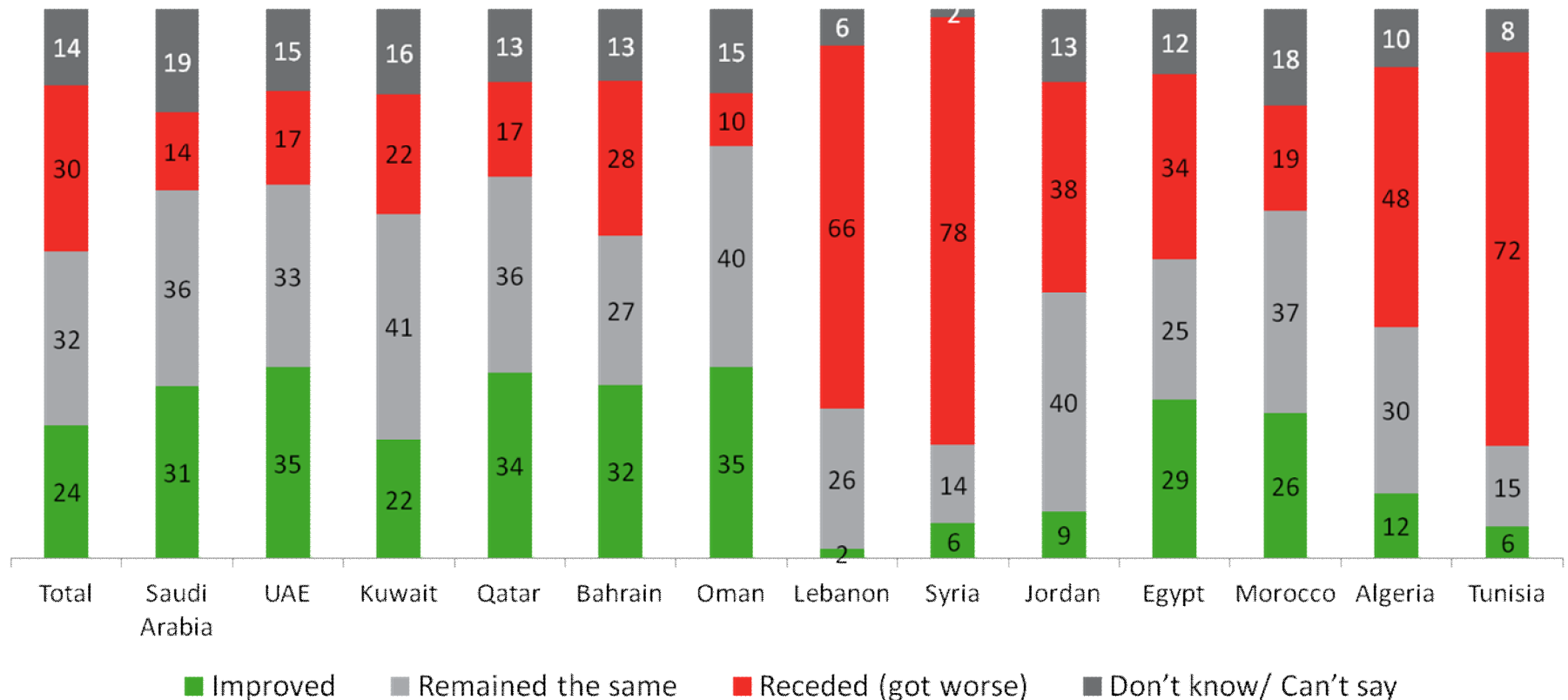
COUNTRY'S ECONOMIC SITUATION

Summary

- Close to a quarter (24%) of respondents believe that their country's economy has improved relative to the past 6 months while about one-third (30%) think it has gotten worse.
- Two-fifths expect the economy in their country to improve in the next 6 months.
- About one-third of employed respondents believe that present business conditions are either very good or good (31%). A much higher proportion of those from GCC have that sentiment as compared to those from Levant and North Africa (47% vs 14% and 16%, respectively).
- A little over half of respondents expect the business conditions to improve in the next year (51%).
- 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.
- Over a quarter of respondents are positive about the future availability of jobs in their country (27% 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, about one-third (30%) think it has gotten worse.
- “ Only 7% of respondents in Levant think their country's economy has improved (GCC:32%, North Africa:22%).
- “ Respondents from Syria and Lebanon are more negative about their country's economy with 78% and 66% of them thinking it has receded as compared to 6 months prior.



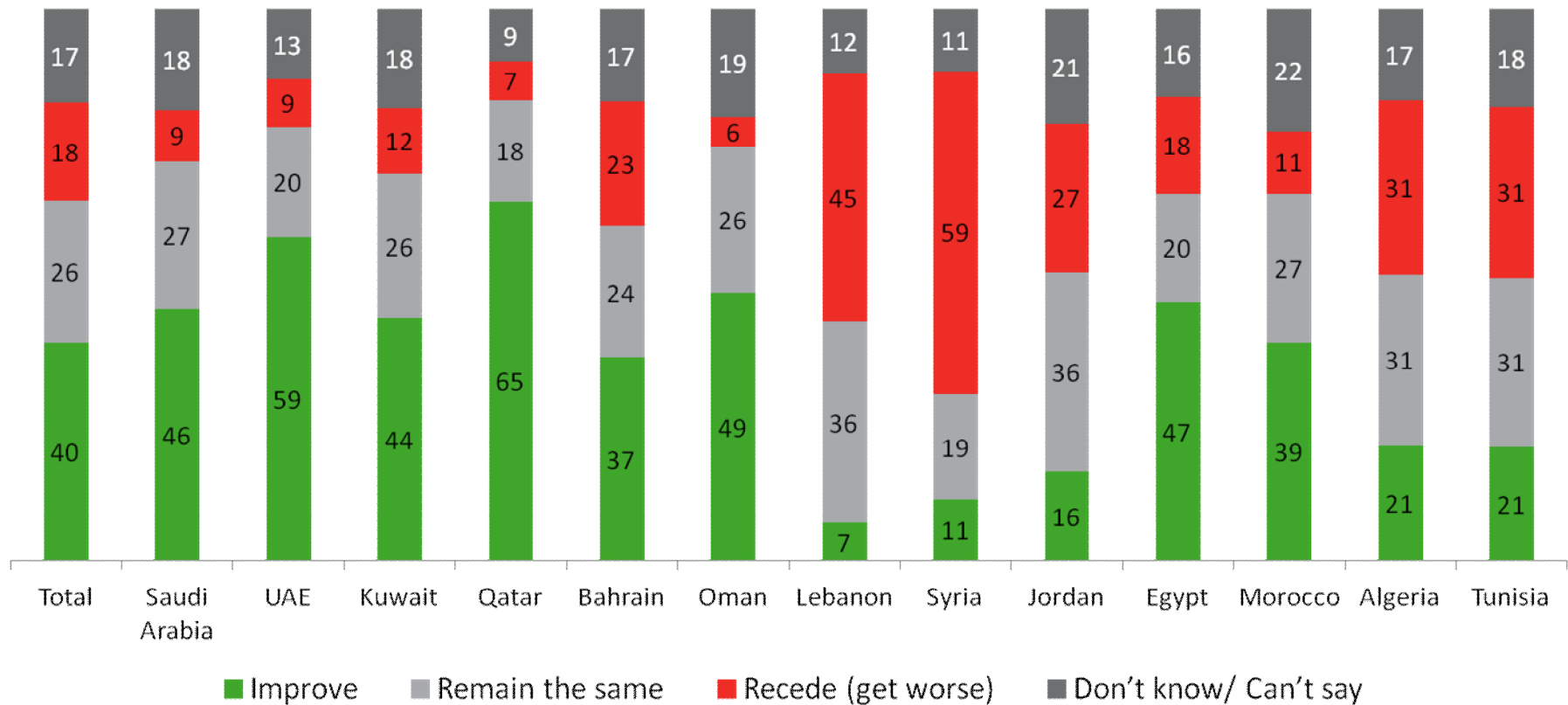
Q. Compared to 6 months earlier, my country's economy has:

Base: Total (8882), KSA (1748), UAE (1011), Kuwait (264), Qatar (255), Bahrain (114), Oman (144), Lebanon (231), Syria (63), Jordan (703), Egypt (2118), Morocco (733), Algeria (1135), Tunisia (363)

All figures are %'s

Country's Economy – Expectations for the Future

- “ Two-fifths expect the economy in their country to improve in the next 6 months.
- “ A higher proportion of respondents from Levant expect their country's economy to recede in the next 6 months (33% versus 10% for GCC and 21% for North Africa).



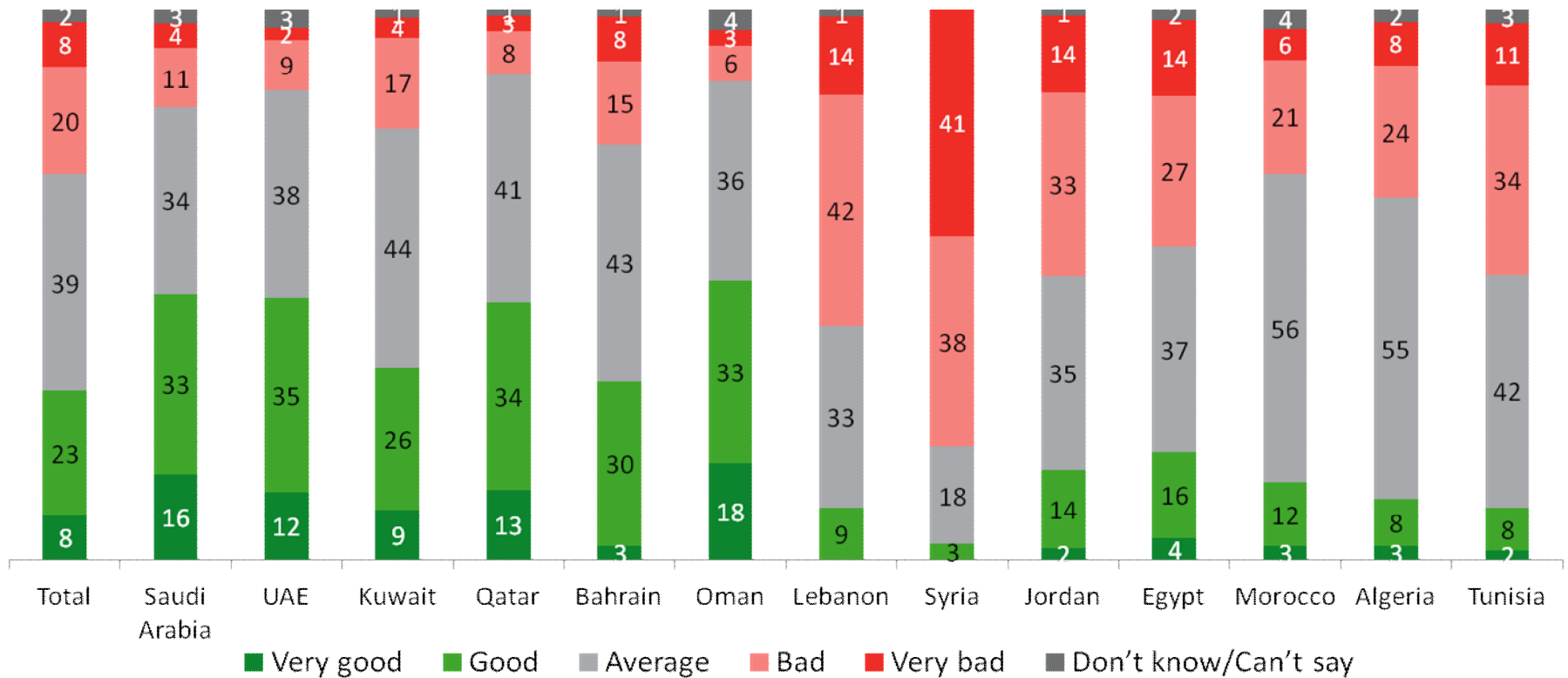
Q. In comparison to the current period, in the next 6 months I expect the economy in my country of residence to :

Base: Total (8882), KSA (1748), UAE (1011), Kuwait (264), Qatar (255), Bahrain (114), Oman (144), Lebanon (231), Syria (63), Jordan (703), Egypt (2118), Morocco (733), Algeria (1135), Tunisia (363)

All figures are %'s

Present Business Conditions

- “ About one-third of employed respondents believe that present business conditions are either very good or good (31%). A much higher proportion of those from GCC have that sentiment as compared to those from Levant and North Africa (47% vs 14% and 16%, respectively).
- “ A higher percentage of Lebanon residents (56%) consider the present business conditions to be bad



**small base*

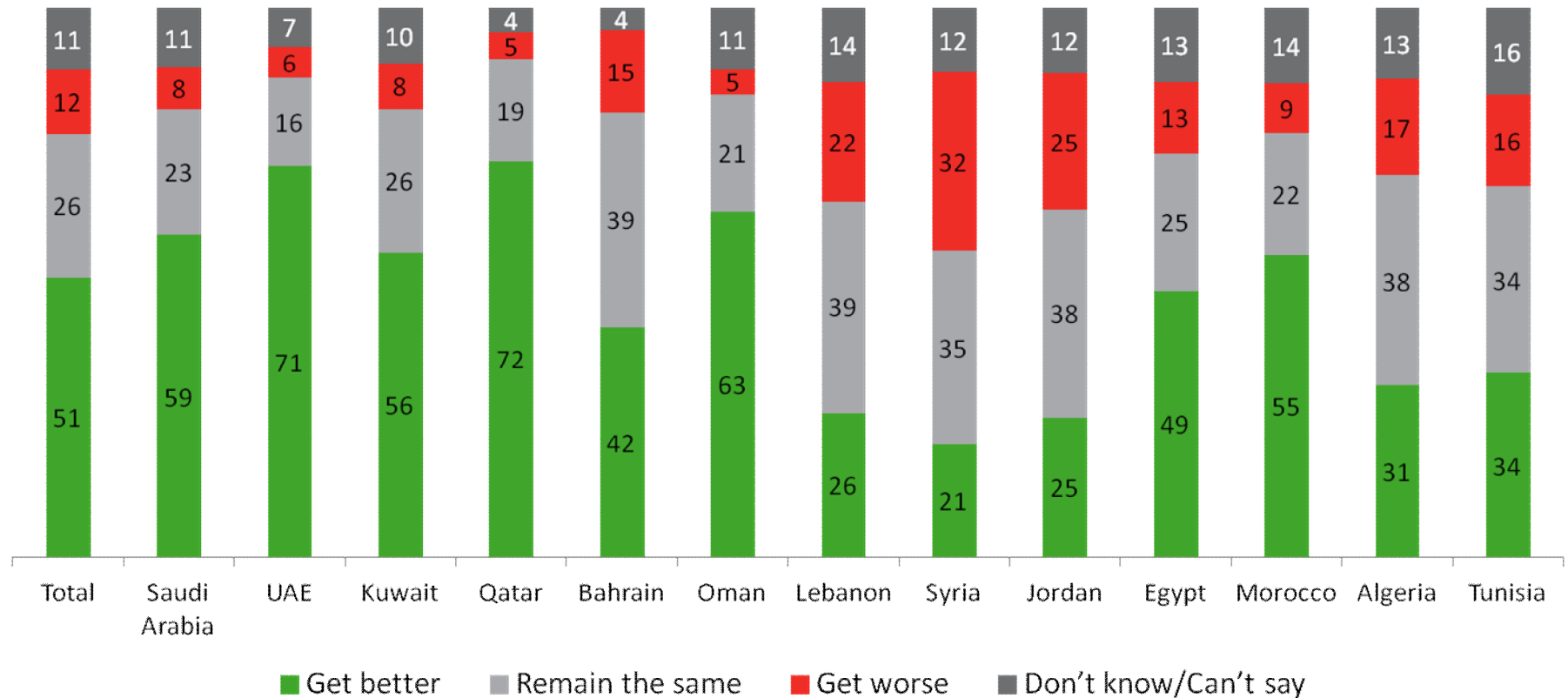
Q. Overall, presently the business conditions are...

Base: Those employed (5503), KSA (1274), UAE (804), Kuwait (218), Qatar (205), Bahrain (74), Oman (108), Lebanon (148), Syria* (34), Jordan (404), Egypt (1299), Morocco (198), Algeria (579), Tunisia (158)

All figures are %'s

Expectations of Future Business Conditions

“ A little over half of respondents expect the business conditions to improve in the next year (51%).
 “ Majority of respondents in the GCC have this positive outlook (63%); this proportion is 25% in Levant and 44% in North Africa.



**small base*

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

Base: Those employed (5503), KSA (1274), UAE (804), Kuwait (218), Qatar (205), Bahrain (74), Oman (108), Lebanon (148), Syria* (34), Jordan (404), Egypt (1299), Morocco (198), Algeria (579), Tunisia (158)

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 (26% across various industries; 22% across a few industries only) as compared to Levant (3% across various industries; 12% across a few industries only) and North Africa (7% across various industries; 16% across a few industries only).

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
Base:	8882	1748	1011	264	255	114	144	231	63	703	2118	733	1135	363
There are plenty of jobs available across various industries	14	25	29	20	32	16	22	3	3	3	8	6	7	2
There are plenty of jobs available but across a few industries only	18	24	21	20	25	12	21	7	10	14	17	18	16	7
There are few jobs available across various industries	25	18	22	22	18	24	21	32	21	33	24	31	32	33
There are few jobs available across few industries	31	17	12	23	10	39	16	47	63	42	40	34	37	53
Don't know/Can't say	12	15	16	16	16	10	20	10	3	7	12	11	9	6

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

- “ Over a quarter of respondents are positive about the future availability of jobs in their country (27% of them expecting it to increase in the next 6 months). Those from Levant seem less optimistic as compared to those from GCC and North Africa (9% vs 37% and 23%, respectively).
- “ Respondents from Qatar and UAE are the most positive about it (both 46%), followed by those from Oman (38%).

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
Base:	8882	1748	1011	264	255	114	144	231	63	703	2118	733	1135	363
Increase	27	32	46	32	46	21	38	2	13	11	30	21	17	10
Remain the same	30	32	26	28	23	37	23	36	22	31	29	28	32	35
Decrease	21	14	9	17	7	22	17	45	46	40	19	22	30	33
Don't know/Can't say	22	22	20	23	24	20	22	17	19	18	22	29	21	21

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

All figures are %'s

Section 3c

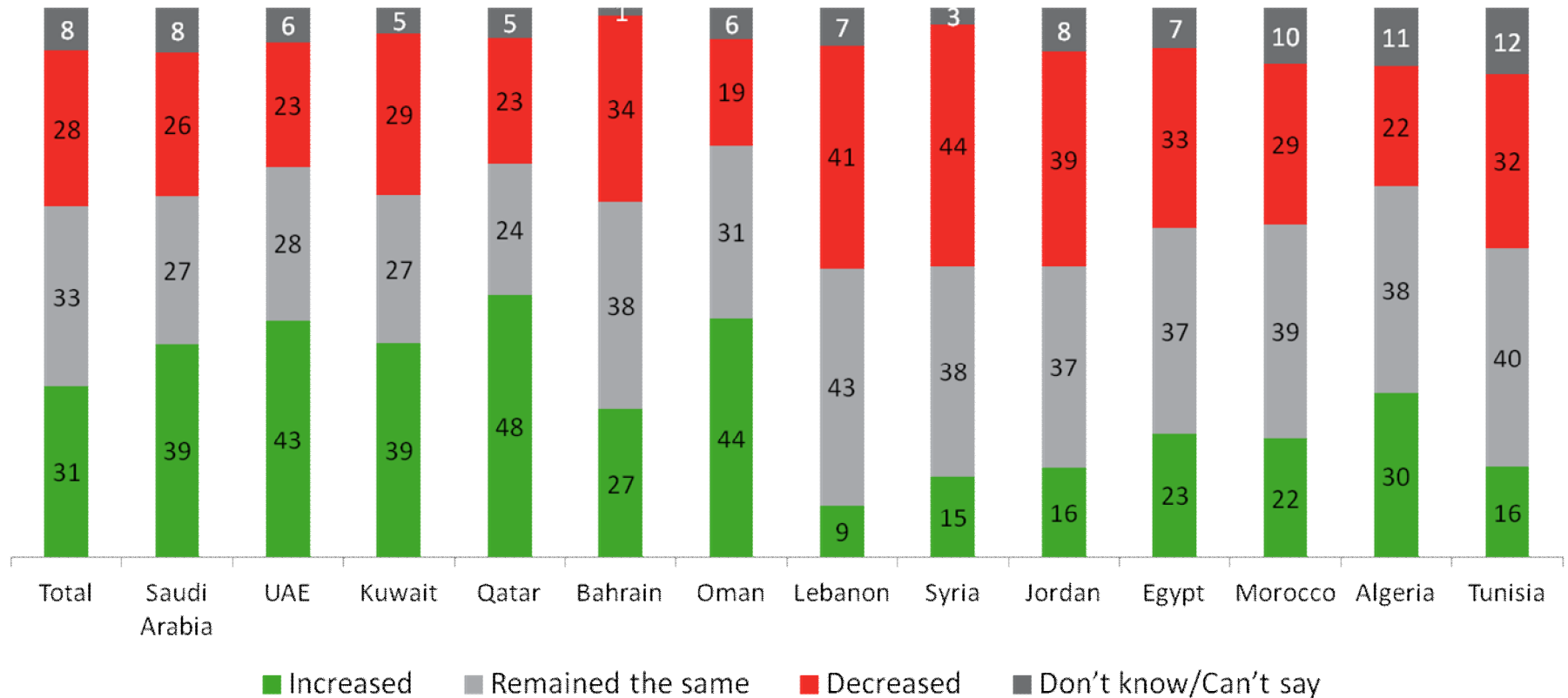
CURRENT JOB

Summary

- Close to a third (31%) state that the number of employees in their organization has increased in comparison to 6 months ago.
- Overall, just over one-third (35%) expect the number of employees in their organization to increase in the next 6 months.
- 44% of employed respondents are satisfied with the career growth opportunities in their current job. Employed respondents from Oman tend to be happier in this regard (57%).
- Close to half of employed respondents are dissatisfied about their current compensation (48%).
- Over two fifths (44%) are satisfied with the non-monetary benefits they receive at their current job.
- About 2 in every 5 employed respondents (43%) are satisfied with their job security.

Change in Number of Employees

- “ Close to a third (31%) state that the number of employees in their organization has increased in comparison to 6 months ago.
- “ A higher proportion of GCC residents (41%) claim that their organization’s employee count has increased as compared to Levant (15%) and North Africa (24%).



**small base*

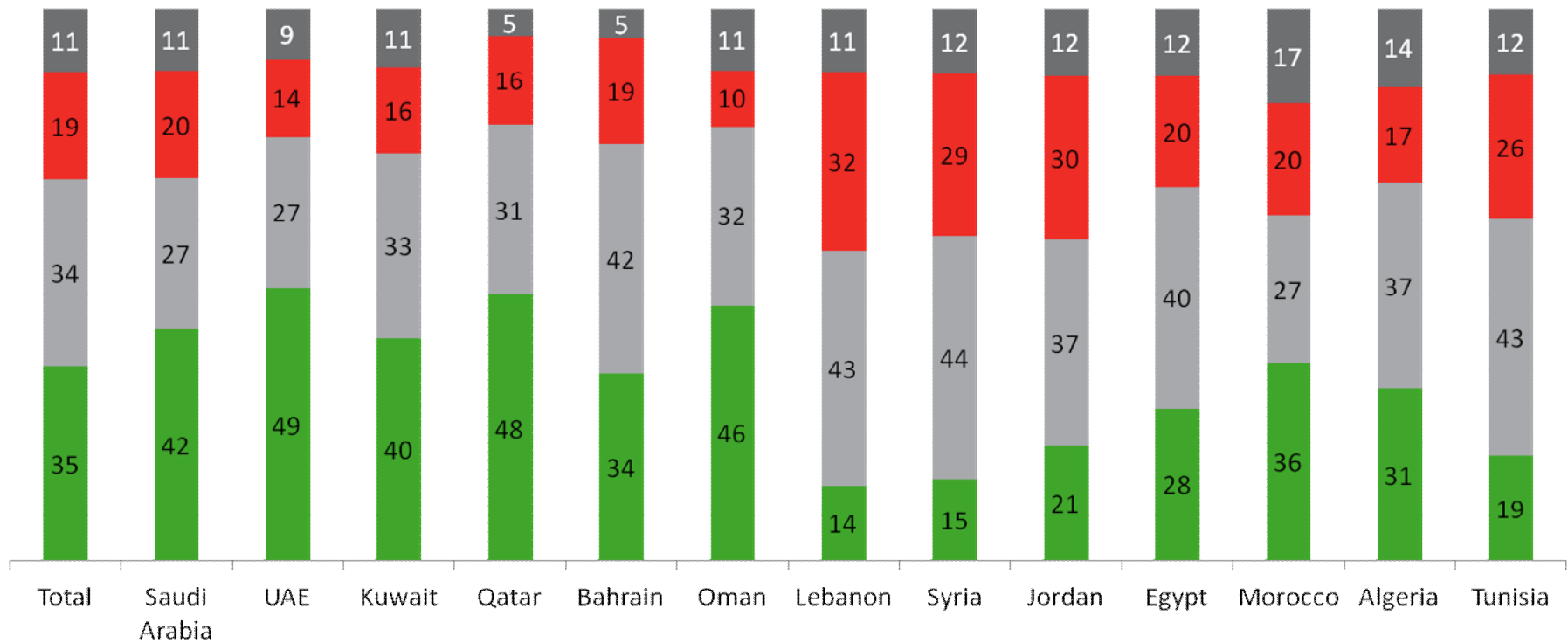
Q. In comparison to 6 months ago, the number of employees in the organization where I work has:

Base: Those employed (5503), KSA (1274), UAE (804), Kuwait (218), Qatar (205), Bahrain (74), Oman (108), Lebanon (148), Syria* (34), Jordan (404), Egypt (1299), Morocco (198), Algeria (579), Tunisia (158)

All figures are %'s

Expected Change in Number of Employees

- “ Overall, just over one-third (35%) expect the number of employees in their organization to increase in the next 6 months.
- “ 45% of GCC residents have this positive outlook regarding their company size, a percentage that is higher than those of Levant and North Africa residents (19% and 29%, respectively).



■ Increase ■ Remain the same ■ Decrease ■ Don't know/Can't say

**small base*

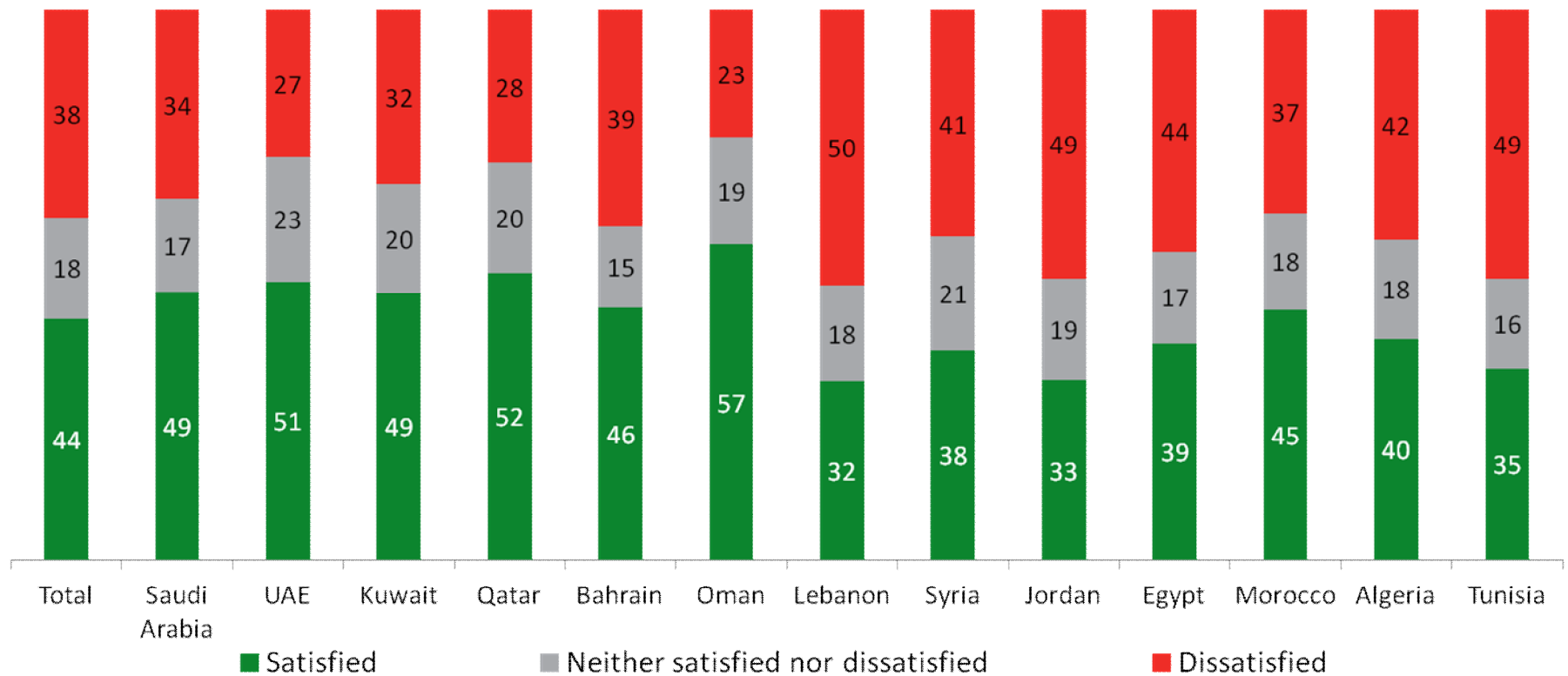
Q. In the next 6 months, I expect the number of employees in my organization to:

Base: Those employed (5503), KSA (1274), UAE (804), Kuwait (218), Qatar (205), Bahrain (74), Oman (108), Lebanon (148), Syria* (34), Jordan (404), Egypt (1299), Morocco (198), Algeria (579), Tunisia (158)

All figures are %'s

Satisfaction Levels: Career Growth Opportunities

- “ 44% of employed respondents are satisfied with the career growth opportunities in their current job. Employed respondents from Oman tend to be happier in this regard (57%).
- “ Employed Levant residents seem less satisfied with the career growth opportunities as compared to the employed residents of GCC and North Africa (33% vs 50% and 40%).



**small base*

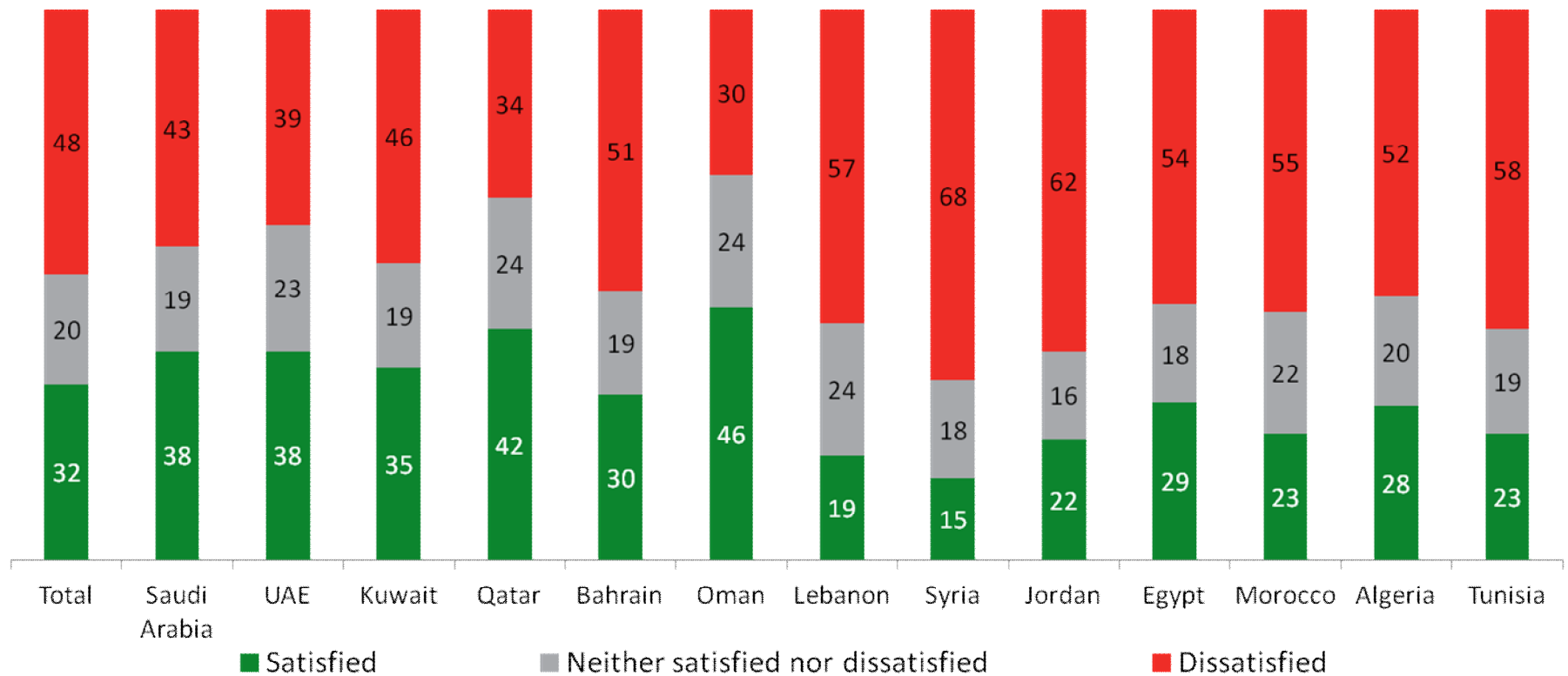
Q. On an overall level, how satisfied are you with the following attributes related to your job?

Base: Those employed (5503), KSA (1274), UAE (804), Kuwait (218), Qatar (205), Bahrain (74), Oman (108), Lebanon (148), Syria* (34), Jordan (404), Egypt (1299), Morocco (198), Algeria (579), Tunisia (158)

All figures are %'s

Satisfaction Levels: Current Compensation (Salary & Allowances)

- “ Close to half of employed respondents are dissatisfied about their current compensation (48%).
- “ Dissatisfaction levels tend to be higher among employed residents of Levant and North Africa (61% and 54%, respectively versus 41% for GCC).



**small base*

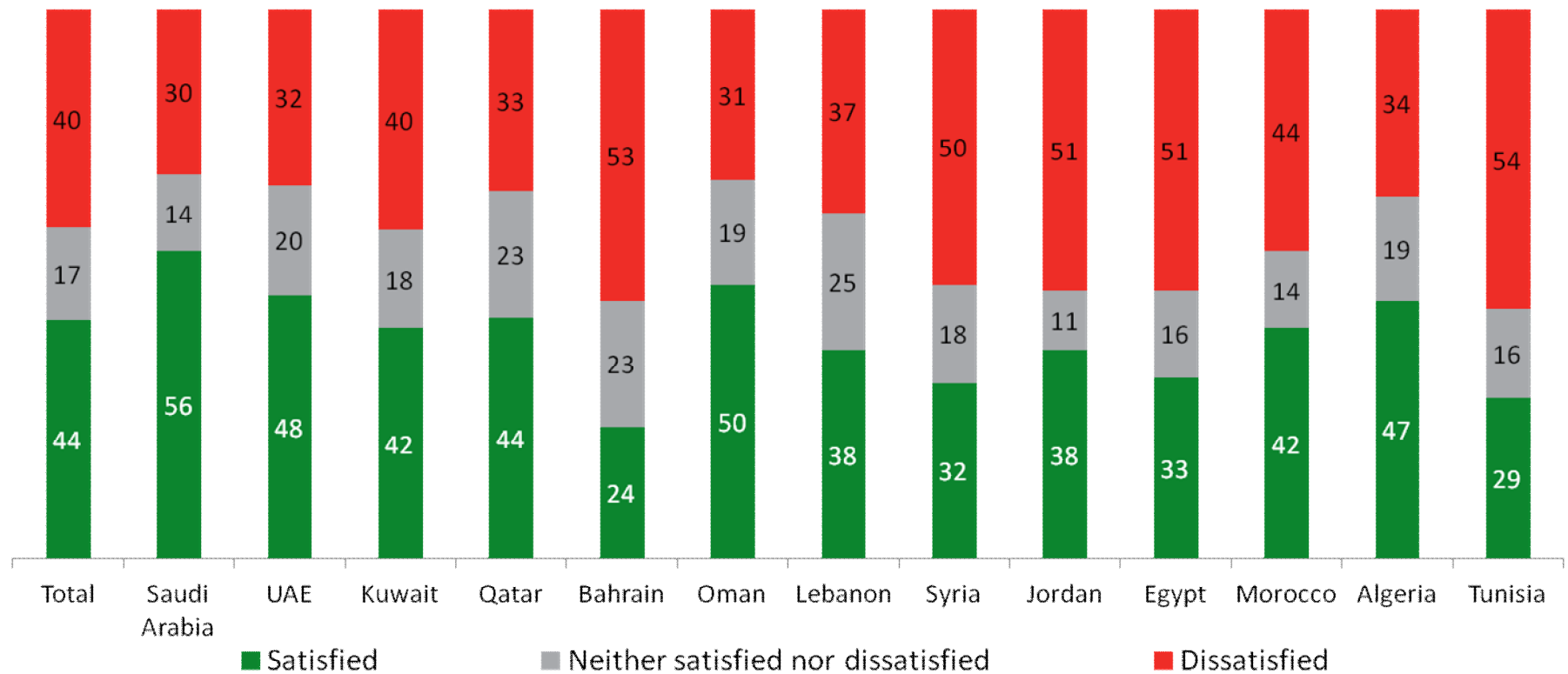
Q. On an overall level, how satisfied are you with the following attributes related to your job?

Base: Those employed (5503), KSA (1274), UAE (804), Kuwait (218), Qatar (205), Bahrain (74), Oman (108), Lebanon (148), Syria* (34), Jordan (404), Egypt (1299), Morocco (198), Algeria (579), Tunisia (158)

All figures are %'s

Satisfaction Levels: Non-monetary Benefits

- “ Over two fifths (44%) are satisfied with the non-monetary benefits they receive at their current job.
- “ Employed residents from GCC are more satisfied in this aspect (50% vs 38% for Levant and 37% for North Africa).
- “ Employed residents from Saudi tend to be happier in terms of the non-monetary benefits they are getting from their job (56%).



**small base*

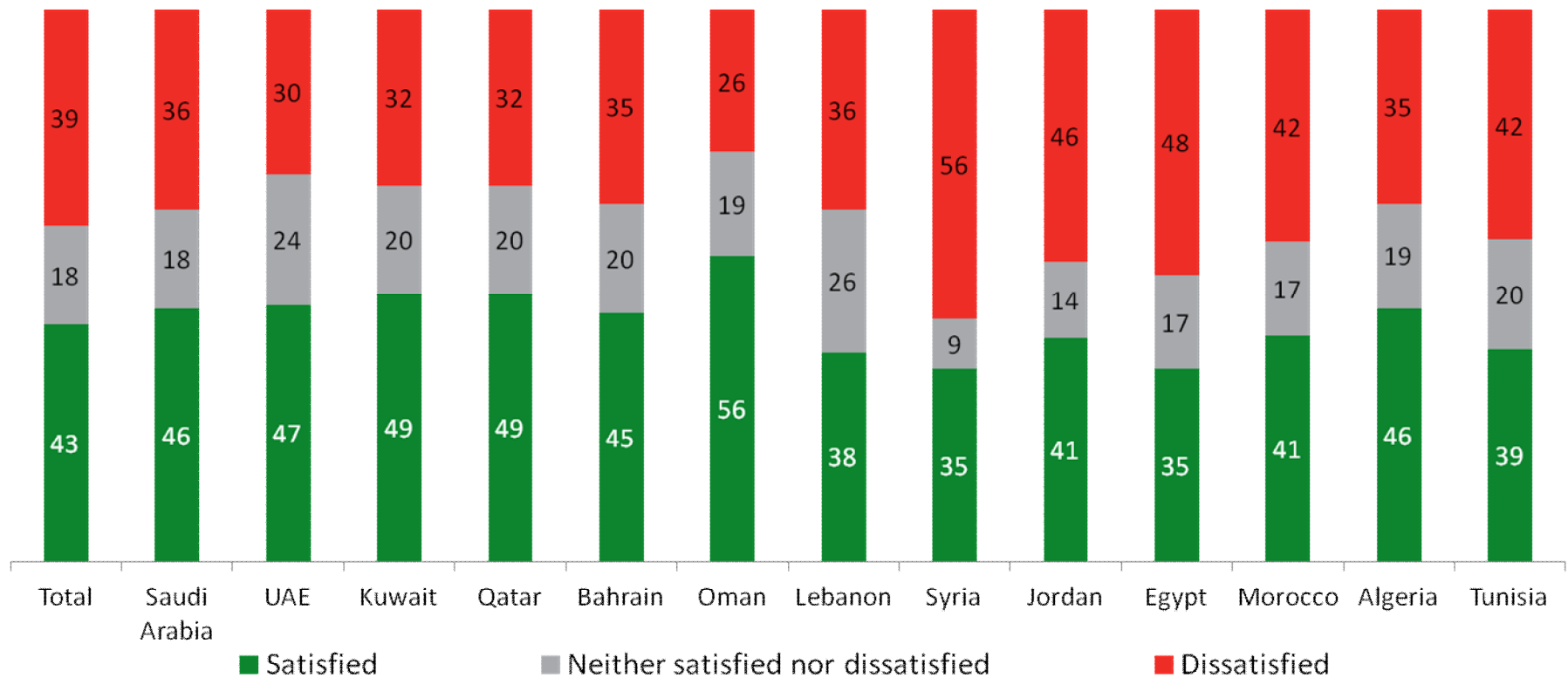
Q. On an overall level, how satisfied are you with the following attributes related to your job?

Base: Those employed (5503), KSA (1274), UAE (804), Kuwait (218), Qatar (205), Bahrain (74), Oman (108), Lebanon (148), Syria* (34), Jordan (404), Egypt (1299), Morocco (198), Algeria (579), Tunisia (158)

All figures are %'s

Satisfaction Levels: Job Security

“ About 2 in every 5 employed respondents (43%) are satisfied with their job security. Satisfaction is highest in Oman at 56%.



**small base*

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

Base: Those employed (5503), KSA (1274), UAE (804), Kuwait (218), Qatar (205), Bahrain (74), Oman (108), Lebanon (148), Syria* (34), Jordan (404), Egypt (1299), Morocco (198), Algeria (579), Tunisia (158)

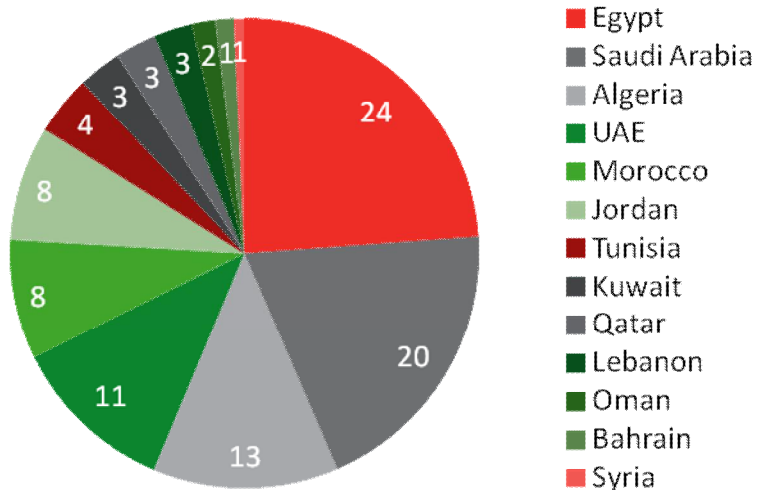
All figures are %'s

Section 4

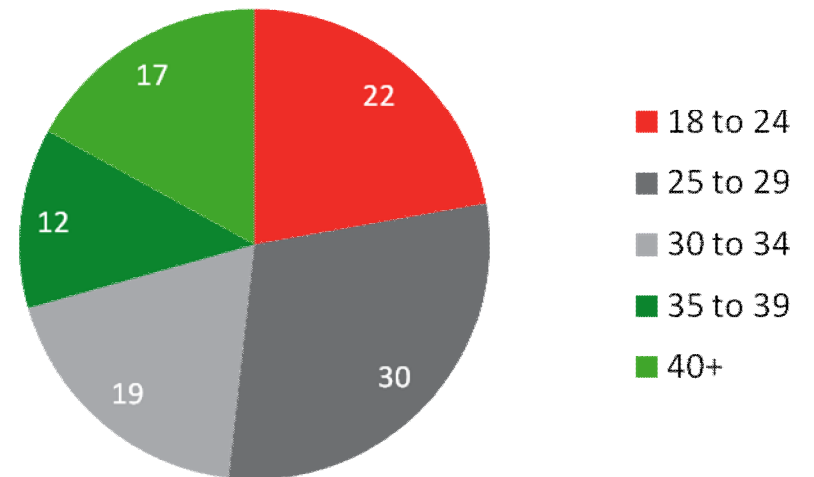
DEMOGRAPHICS

Respondent Profile 1/4 – Personal

Country of residence



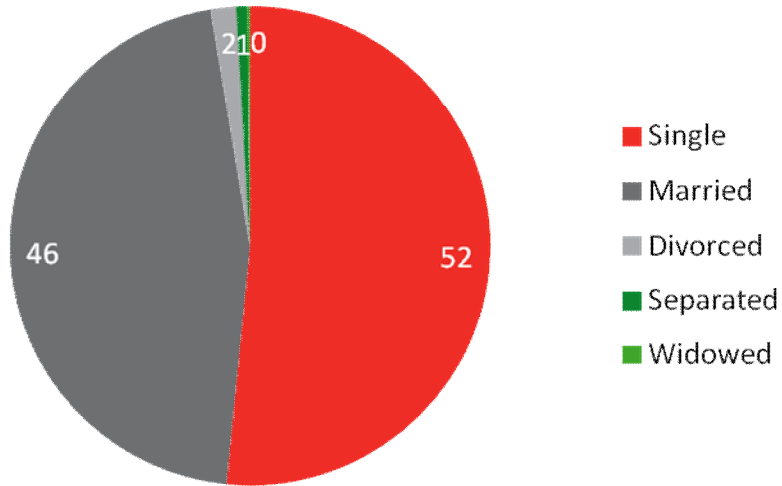
Age Groups



Base: Total (8882)
All figures are %'s

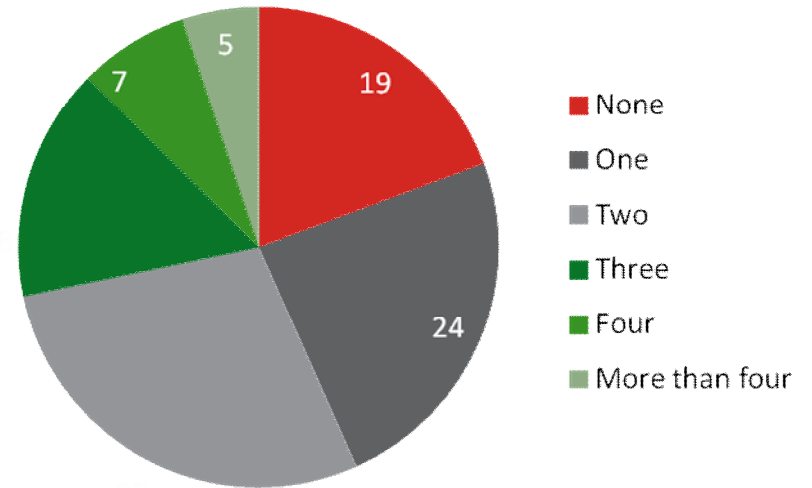
Respondent Profile 2/4 – Personal

Marital Status



Base: Total (8882)

No. of children



Base: Those Married/Divorced/Separated/ Widowed (4302)

All figures are %'s

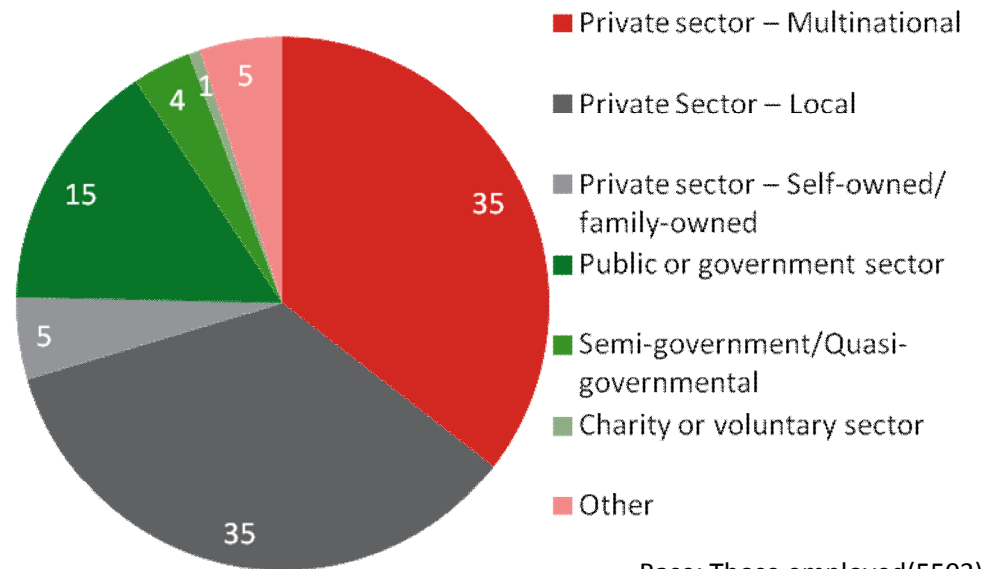
Respondent Profile 3/4 – Professional

Work Status



Base: Total (8882)

Sector

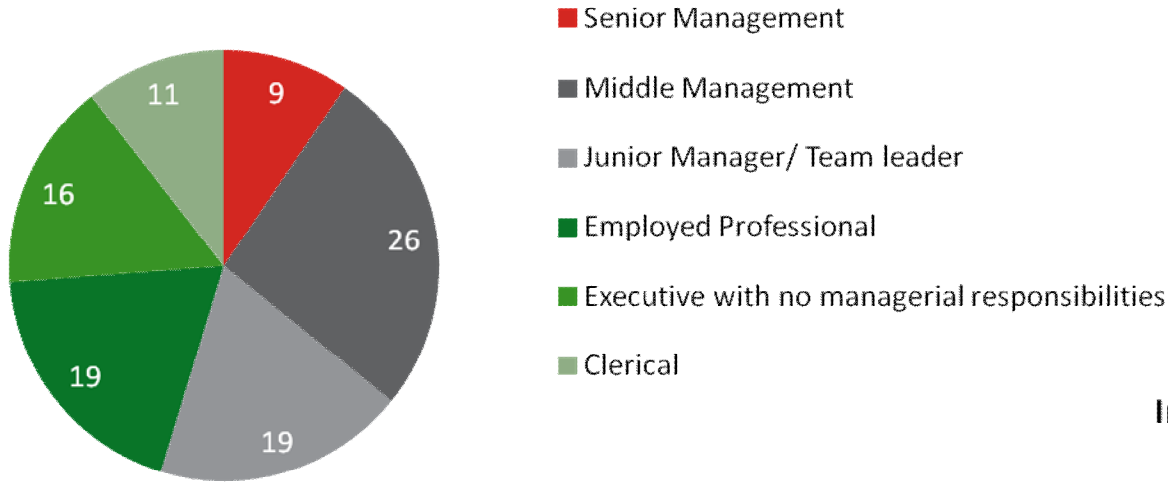


Base: Those employed(5503)

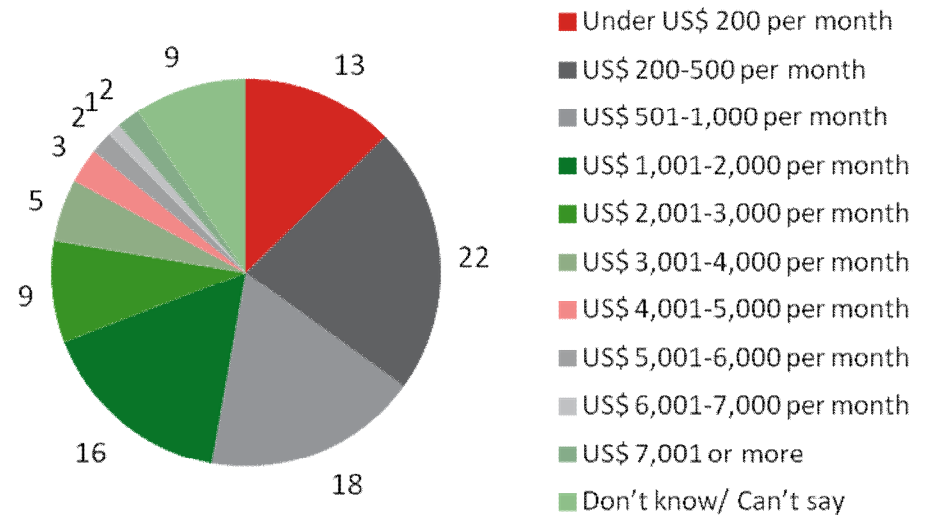
All figures are %'s

Respondent Profile 4/4 – Professional

Seniority



Income Group



Base: Those employed (5503)

All figures are %'s

Thank You

