



# Top Cities

of the Middle East & North Africa

July 2012



## Objective

- To understand the opinion of people living in the Middle East about the city they reside in.
- To assess the key cities in the Middle East on various aspects that have direct impact on the Quality of Life of its residents.

# Demographic Background & Methodology

- **Age and Gender**
  - Adult males and females
  - Aged 18 plus years
- **Nationalities**
  - GCC Arabs, North Africans, Levant, Western Expats & Asians
- **Country of Residence**
  - GCC: UAE, KSA, Kuwait, Oman, Qatar, Bahrain
  - Levant: Lebanon, Syria, Jordan
  - North Africa: Egypt, Morocco, Algeria, Tunisia
- **Methodology**
  - Online data collection was done between 24<sup>th</sup> June to 4<sup>th</sup> July 2012. The total number of respondents who answered this survey was 9,038.
  - The results depicted from Section 1 onwards are based on a sample size of 6,013 which is a reflection of respondents from all the major cities in the region.

Note: 'Don't know/ Can't Say' has not been included in the charts that follow. Hence the total may not add up to 100%

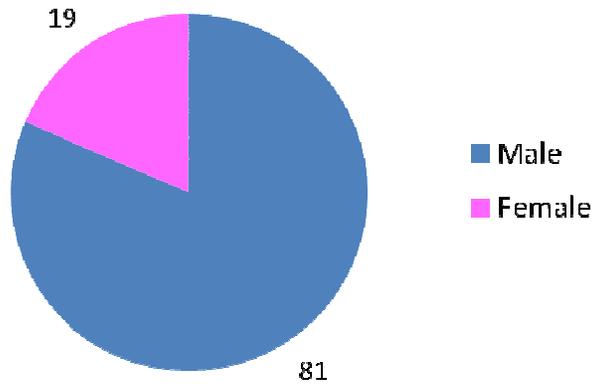
## Cities Covered in the Scope of this Research

Country	City
Algeria	Algiers (n = 193)
Bahrain	Manama (n = 73)
Egypt	Alexandria (n = 312)
	Cairo (n = 940)
Jordan	Amman (n = 456)
Kuwait	Kuwait City (n = 206)
Lebanon	Beirut (n = 113)
Morocco	Casablanca (n = 193)
	Marrakech (n = 72)
	Rabat (n = 81)
Oman	Muscat (n = 143)
Qatar	Doha (n = 382)
Saudi Arabia	Jeddah (n = 543)
	Riyadh (n = 716)
Syria	Aleppo (n = 67)
	Damascus (n = 162)
Tunisia	Tunis (n = 170)
UAE	Abu Dhabi (n = 414)
	Dubai (n = 607)
	Sharjah (n = 170)

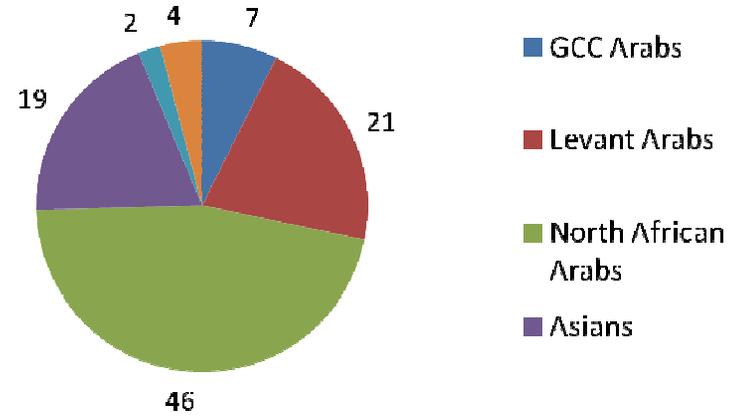
# Respondent profile

# Demographics

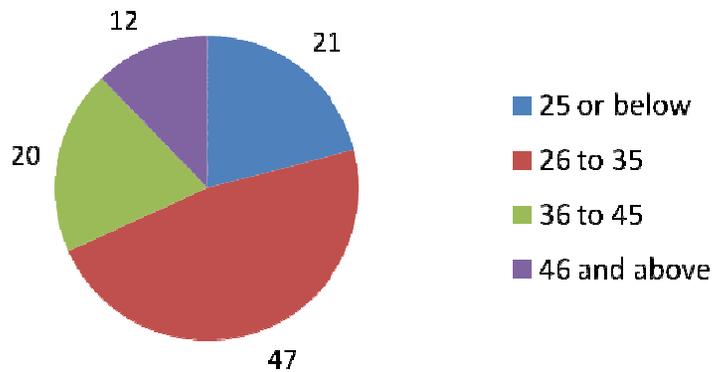
## Gender



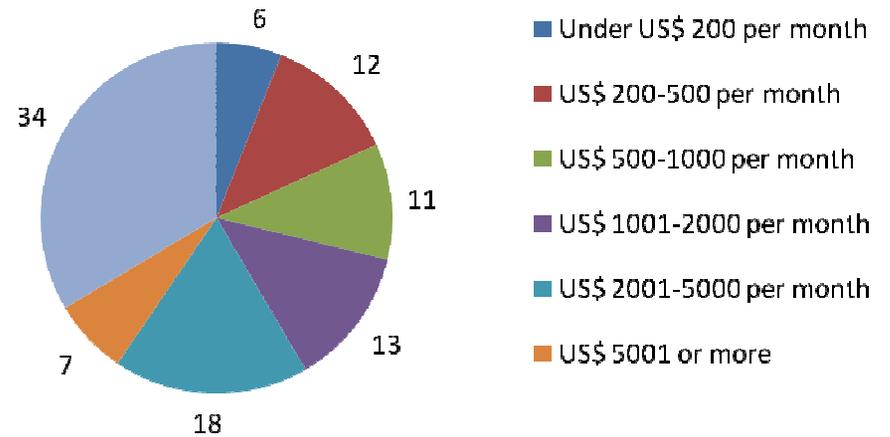
## Nationality Groups



## Age

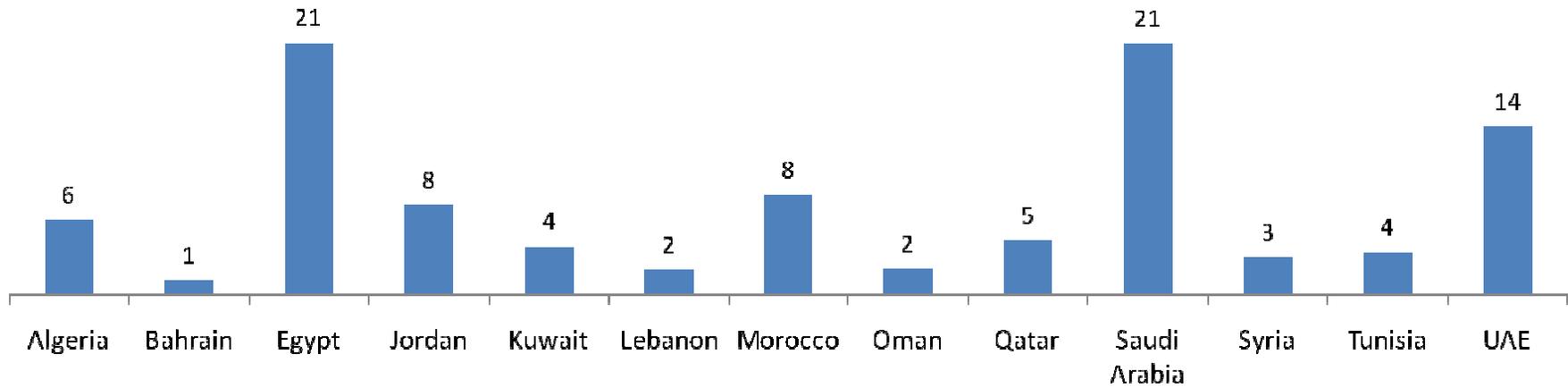


## Income

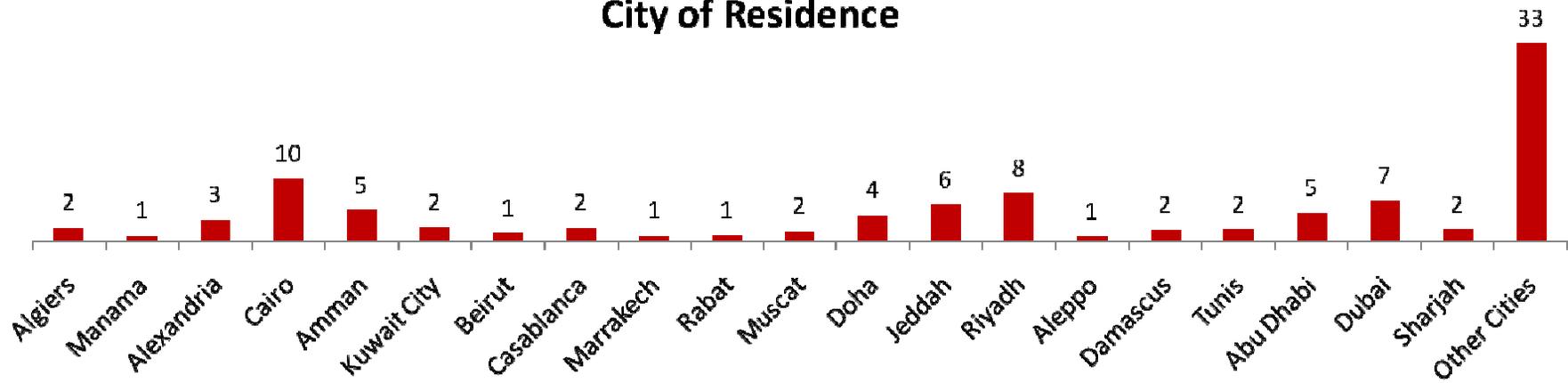


Base: 9,038

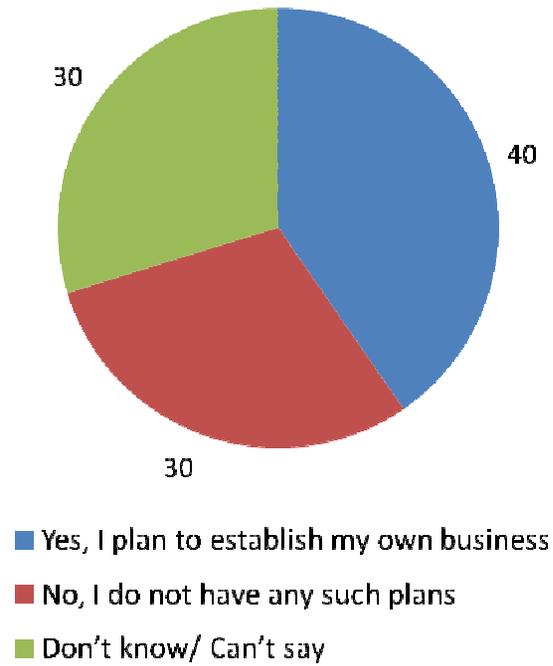
### Country of Residence



### City of Residence



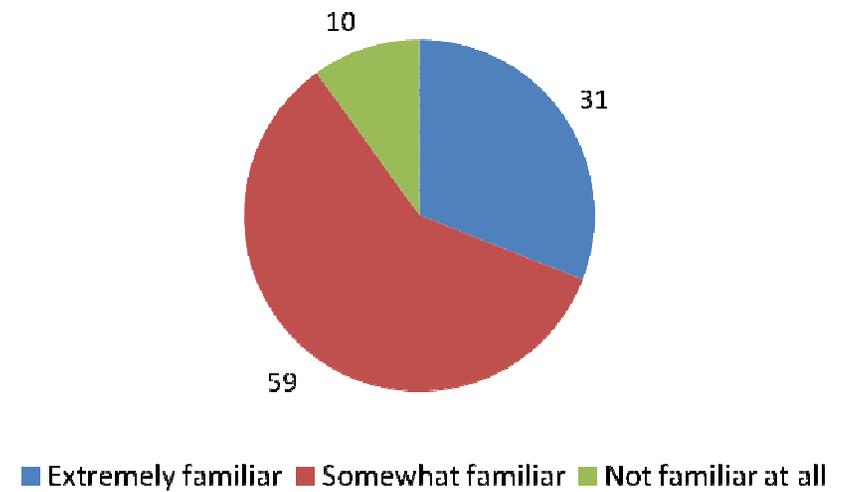
### Plan to establish own business



Base: 9,038



### Familiarity with Labor Laws



Base: Those who plan to establish own business :3,650

# Main report



Section 1

# Economic factors

## Section Overview

In the following section, the respondents were asked to rate the city on some 'Economic Factors' that affect one's daily life. The rating was on a 5 point scale where "1" is "Bad" and "5" is "Excellent". The factors that were rated are as follows:

- Availability of Jobs
- Competitive Salaries
- Affordable Housing
- Cost of Living
- Utilities charges (Water, electricity, sewerage etc.)
- Tax brackets

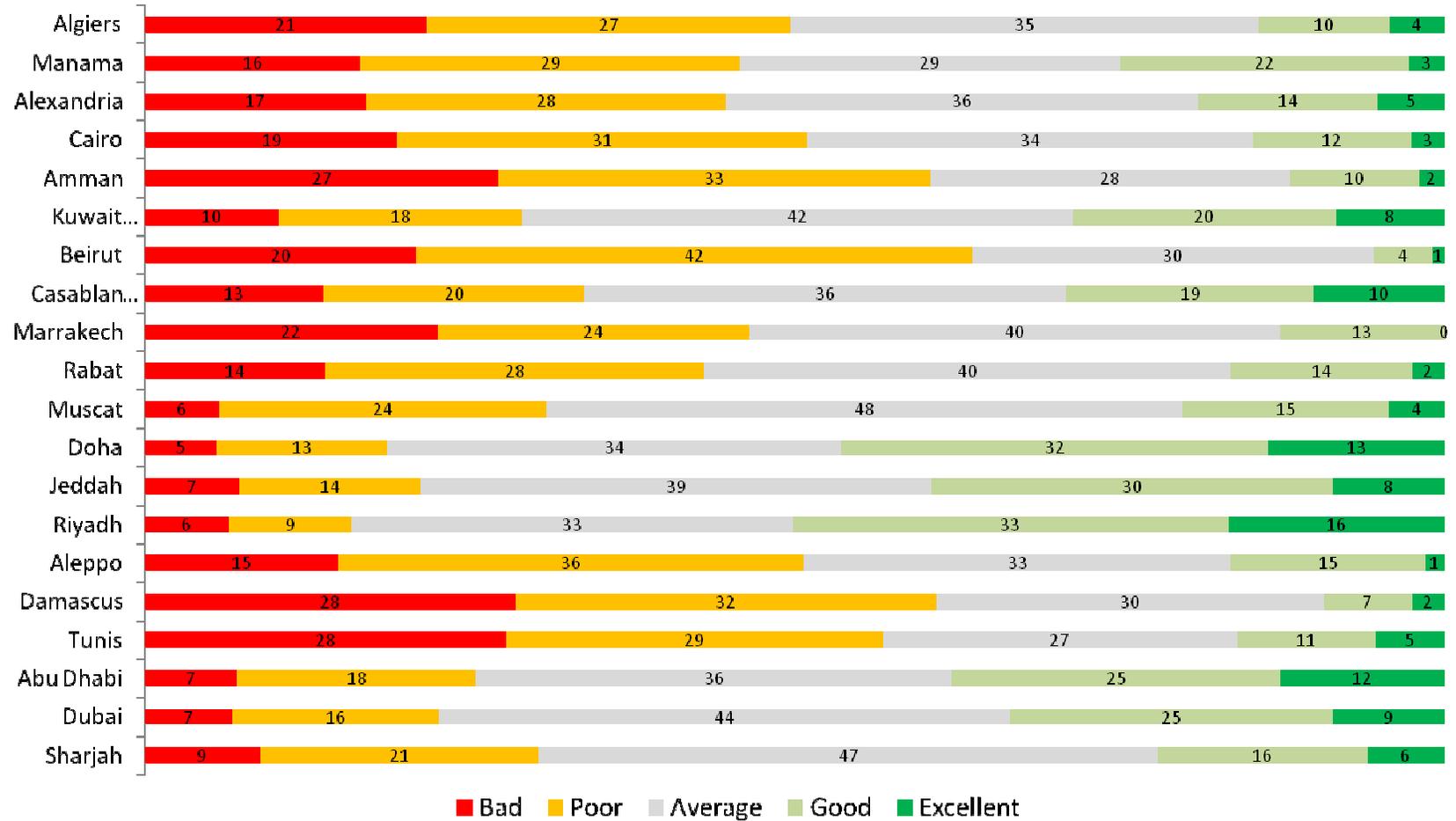
## Summary

- None of the cities are perceived to be excellent in terms of job offering with the exception of Riyadh and Doha whose residents perceive them to be good/ excellent.
- With regards to salaries, 44% of the respondents from Doha claim their city is good/ excellent, followed by Abu Dhabi (41%), Riyadh (40%) and Dubai (38%).
- ‘Availability of affordable housing’ is a region-wide issue, especially in Algiers where 73% think it is bad/poor. On the other hand, 47% of respondents from Sharjah rate their city positively (32% say it’s Good and 15% rate it as Excellent).
- High ‘Cost of Living’ is a common issue faced by the residents of the MENA region, especially by those residing in Levant.
- Respondents from the GCC cities like Manama, Kuwait, Jeddah, Riyadh and Abu Dhabi rate their city highly on ‘affordable utility charges’. On the other hand residents of Amman, Beirut and Moroccan cities (Casablanca and Marrakech) feel otherwise.

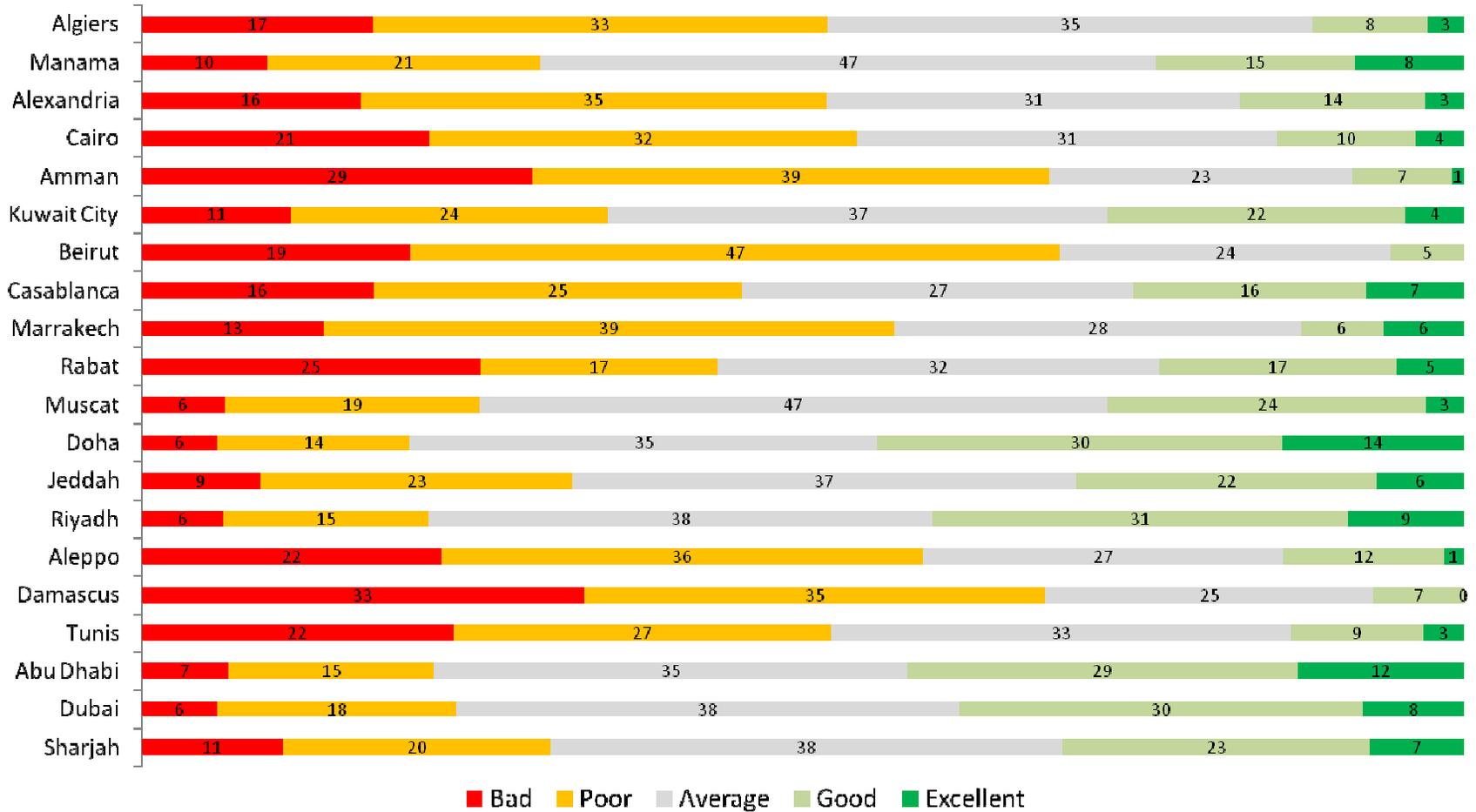
## Top Performers

- Cities that were rated highly by the residents on 'Economic Factors' are:
  - Manama
  - Kuwait
  - Riyadh
  - Doha
  - Abu Dhabi

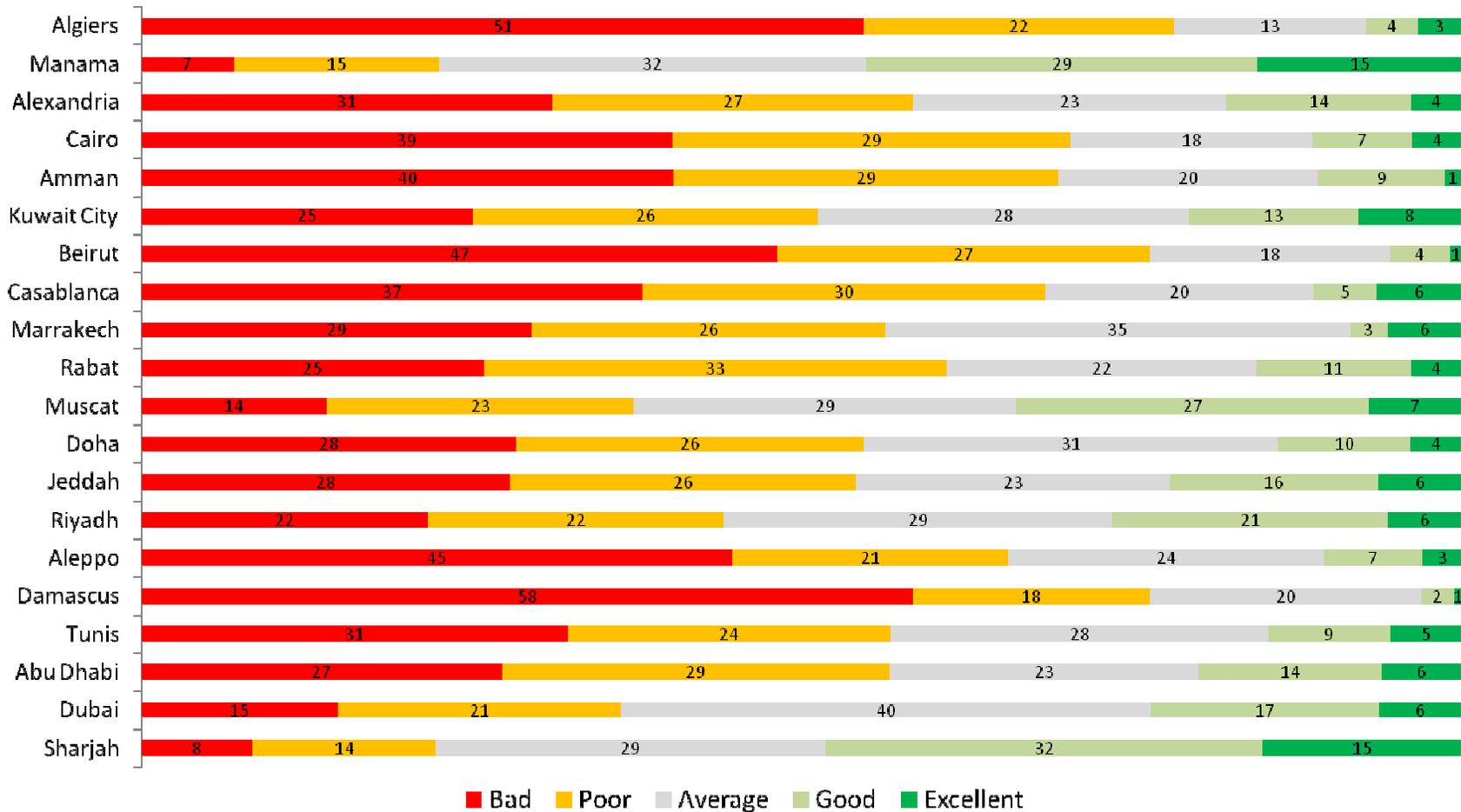
# Availability of Jobs



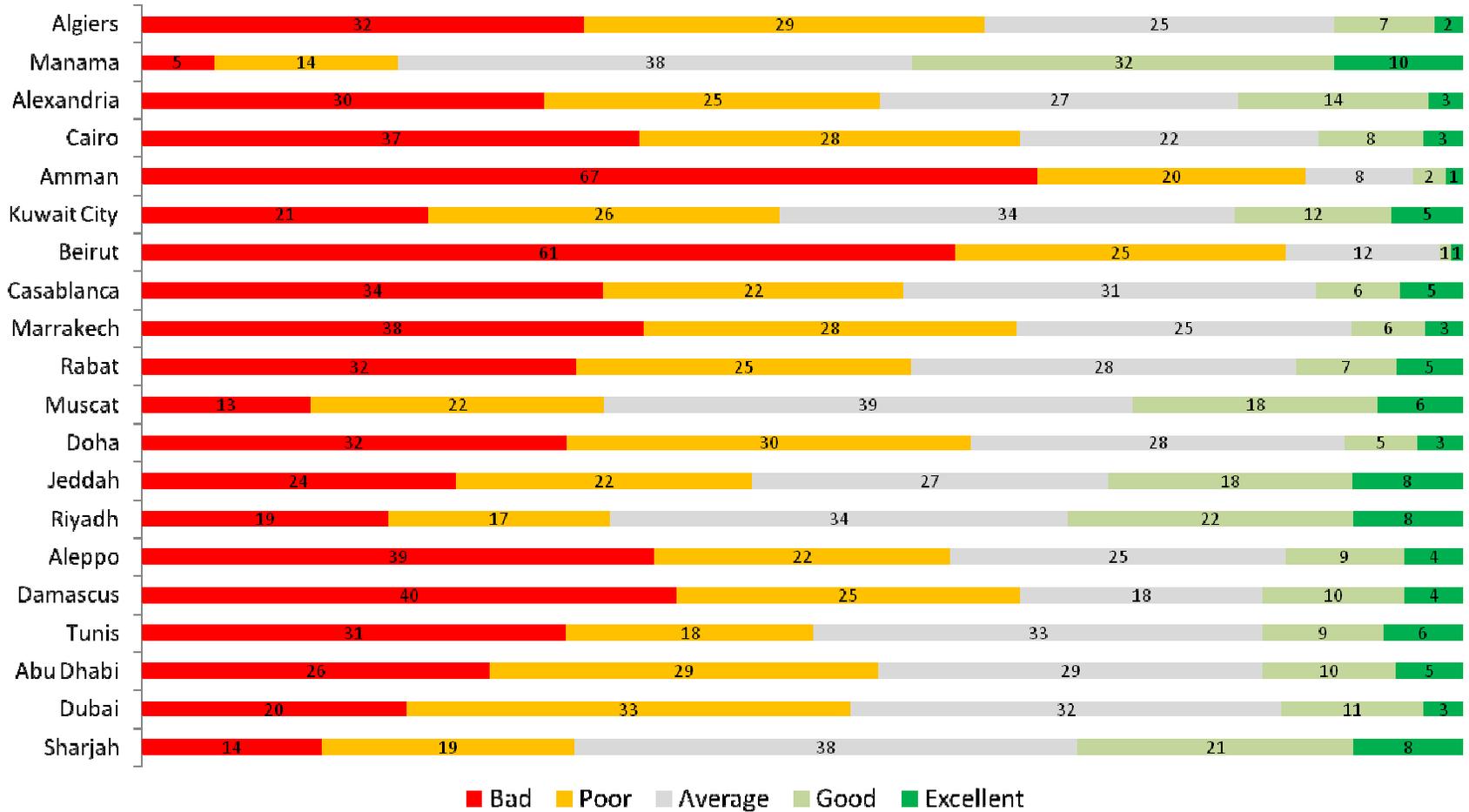
# Competitive Salaries



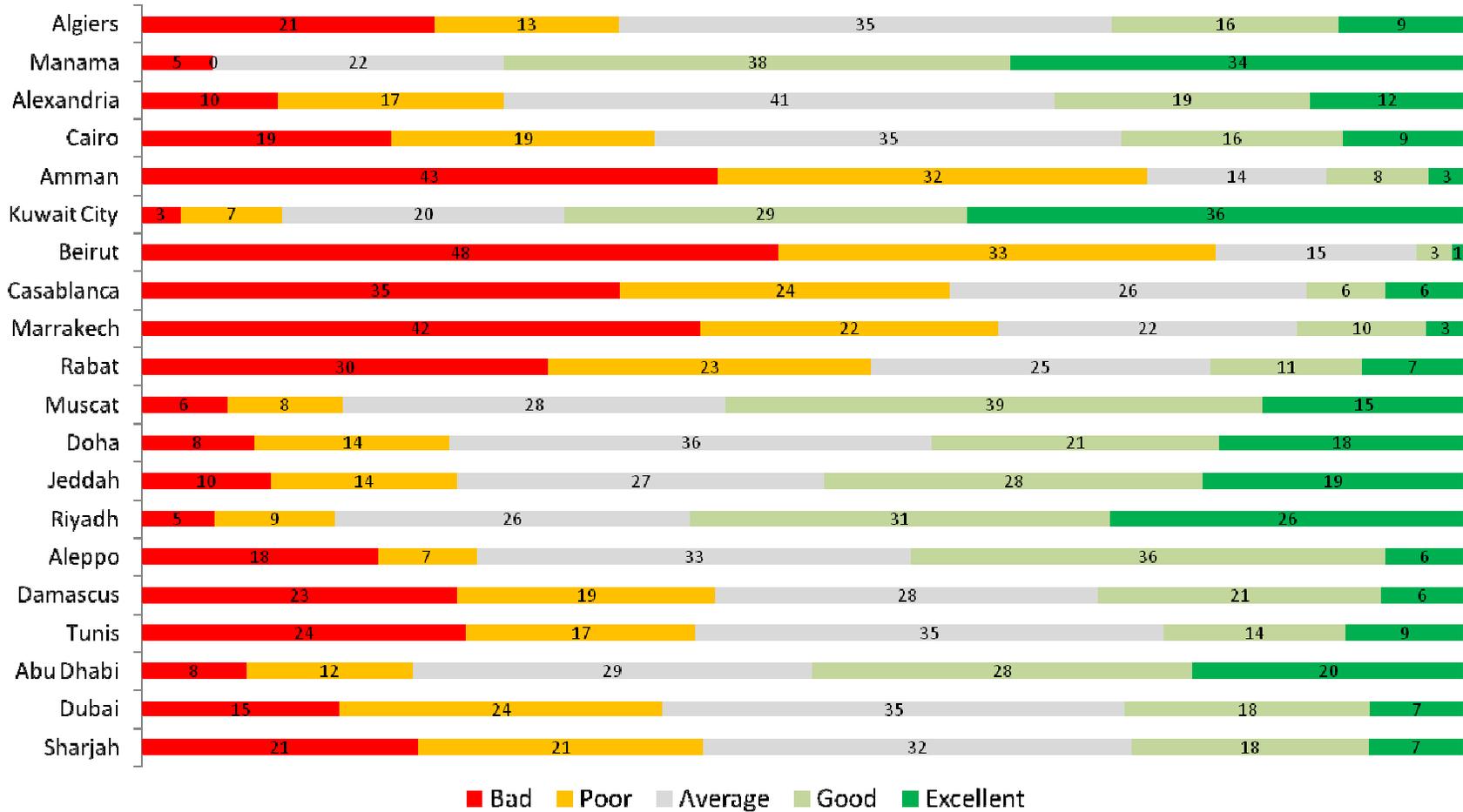
# Availability of affordable housing



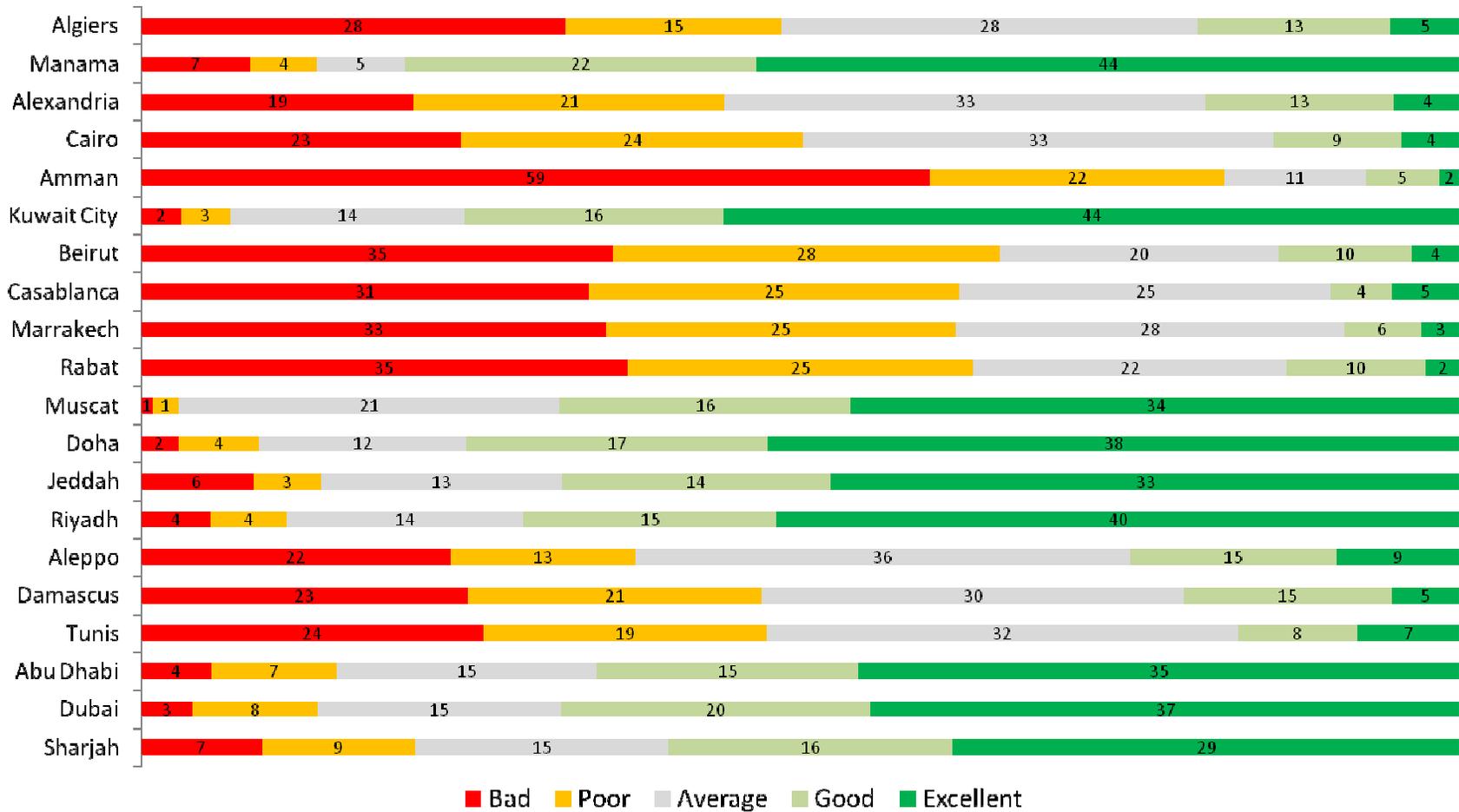
# Low Cost of living



# Affordable utilities charges (Water, electricity, sewerage etc.)



# Low Tax brackets





Section 2

# Entrepreneurship factors

## Section Overview

In the following section, the respondents who plan to start their own business in the near future (next 2 years), were asked to rate the city they live in on some 'Entrepreneurship Factors' that affect one when planning to start a new business. The rating was on a 5 point scale where "1" is "Bad" and "5" is "Excellent".

The factors that were rated are as follows:

- Ease of starting up a new business
- Lack of bureaucracy in procedures and paperwork
- Ease of finding finances to start a business
- Market willingness to accept new ideas and innovations
- Lower competition in the market
- Ability to find local talent to employ
- Low fees and tax rates

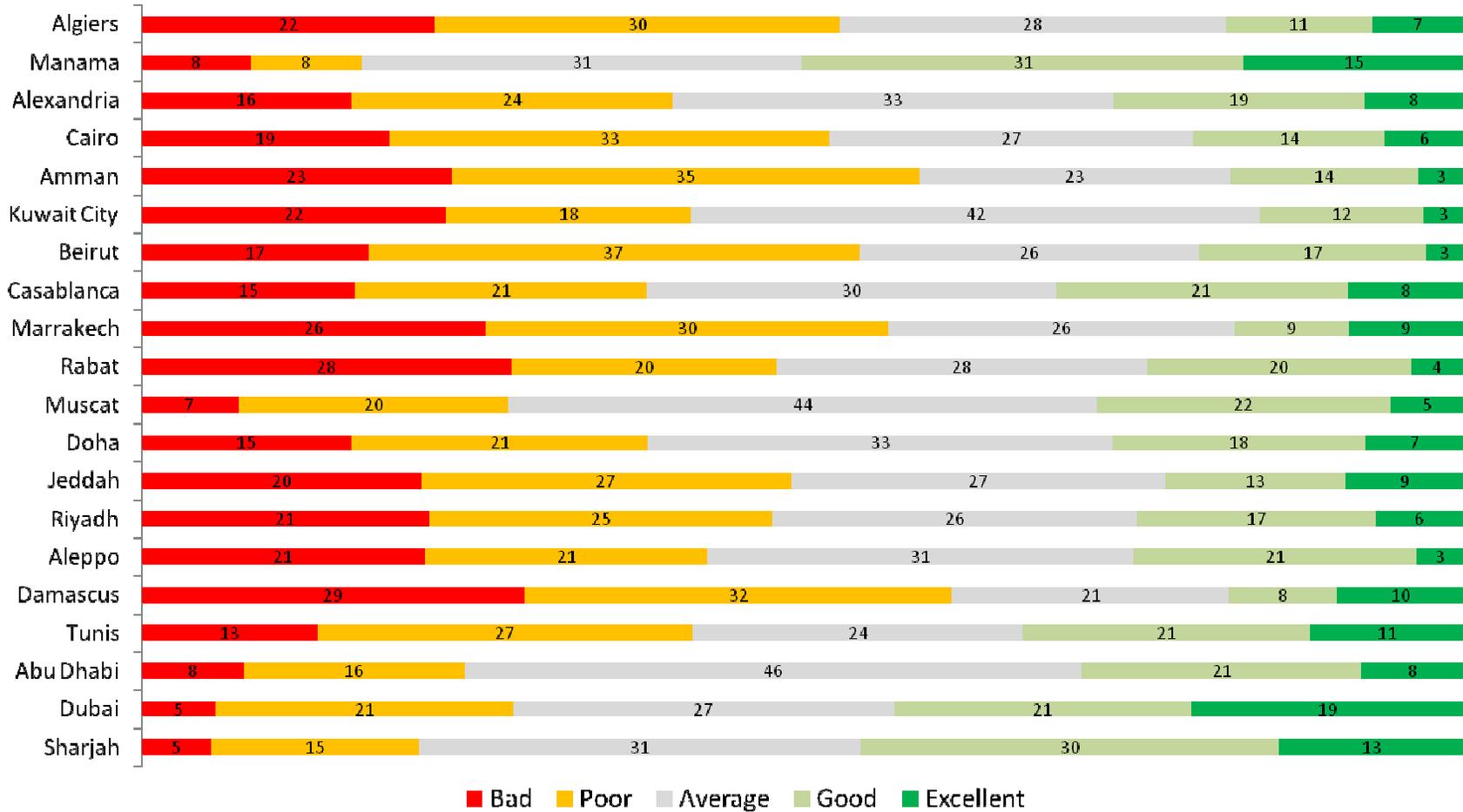
## Summary

- Residents of Dubai (19%), Manama (15%) and Sharjah (13%) appear to have a positive sentiment towards the ease of setting up a new business. However residents of other cities like Amman, Marrakech and Cairo have a more negative outlook towards the same.
- Bureaucracy in paperwork and procedures is a major issue in countries like Syria, Algeria and Egypt as residents from these countries rate their city to be 'Bad' or 'Poor'.
- Finding finance for setting up a new business is considered as a challenge by majority of the residents of the MENA region. According to residents in cities like Manama, Muscat, Abu Dhabi and Dubai it is not as big of a challenge.
- Residents of Abu Dhabi (25%), Dubai (20%) and Sharjah (18%) claim their cities are excellent when it comes to the willingness to accept new ideas and concept.
- Most of the cities are perceived to be average in terms of the level of competition in the market place.
- In comparison with other cities, Tunis has been rated highly in terms of 'ability to find and employ local talent' followed by Beirut.

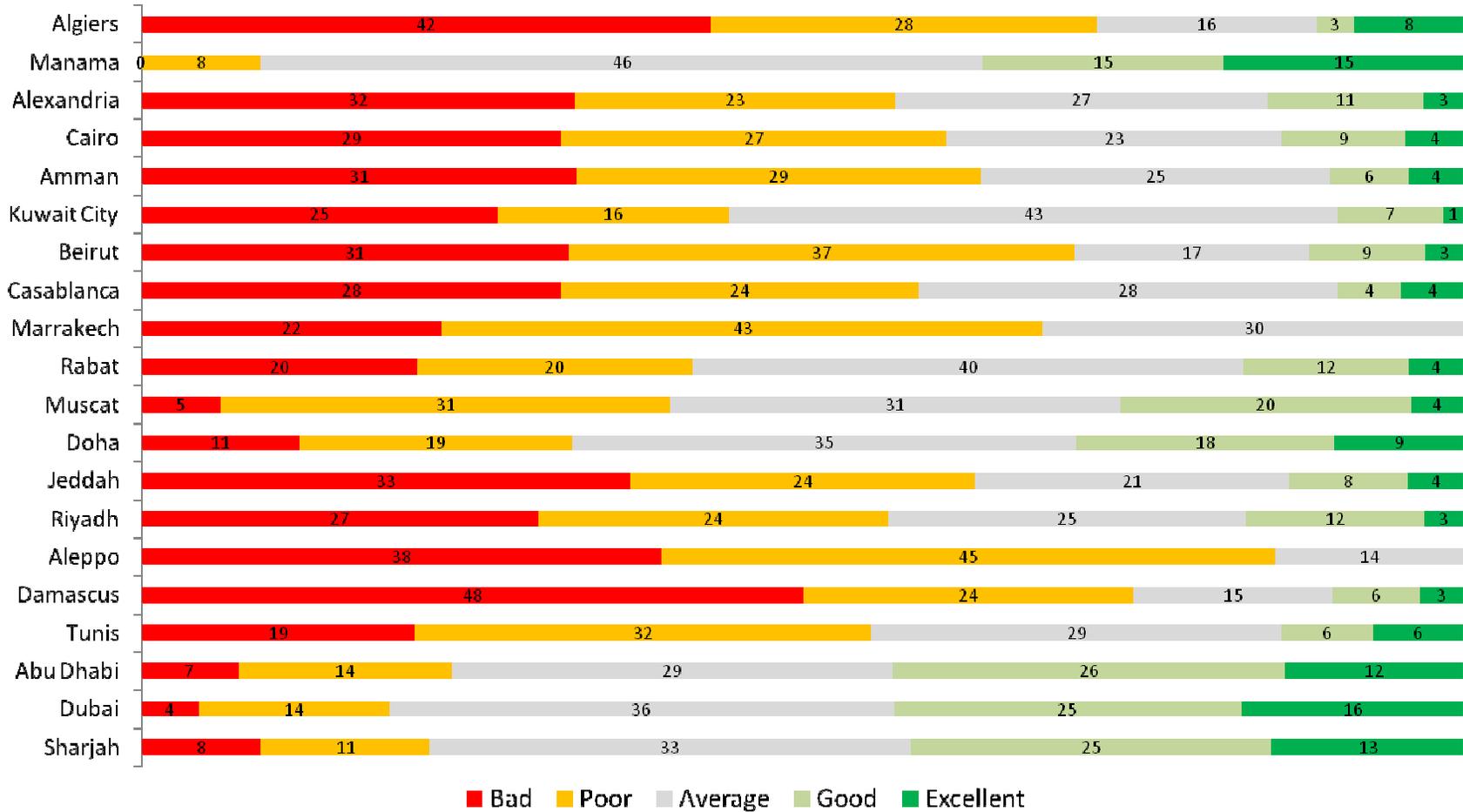
## Top Performers

- Cities that were rated highly by the residents on 'Entrepreneurship Factors' are:
  - Manama
  - Dubai
  - Abu Dhabi
  - Tunis
  - Sharjah

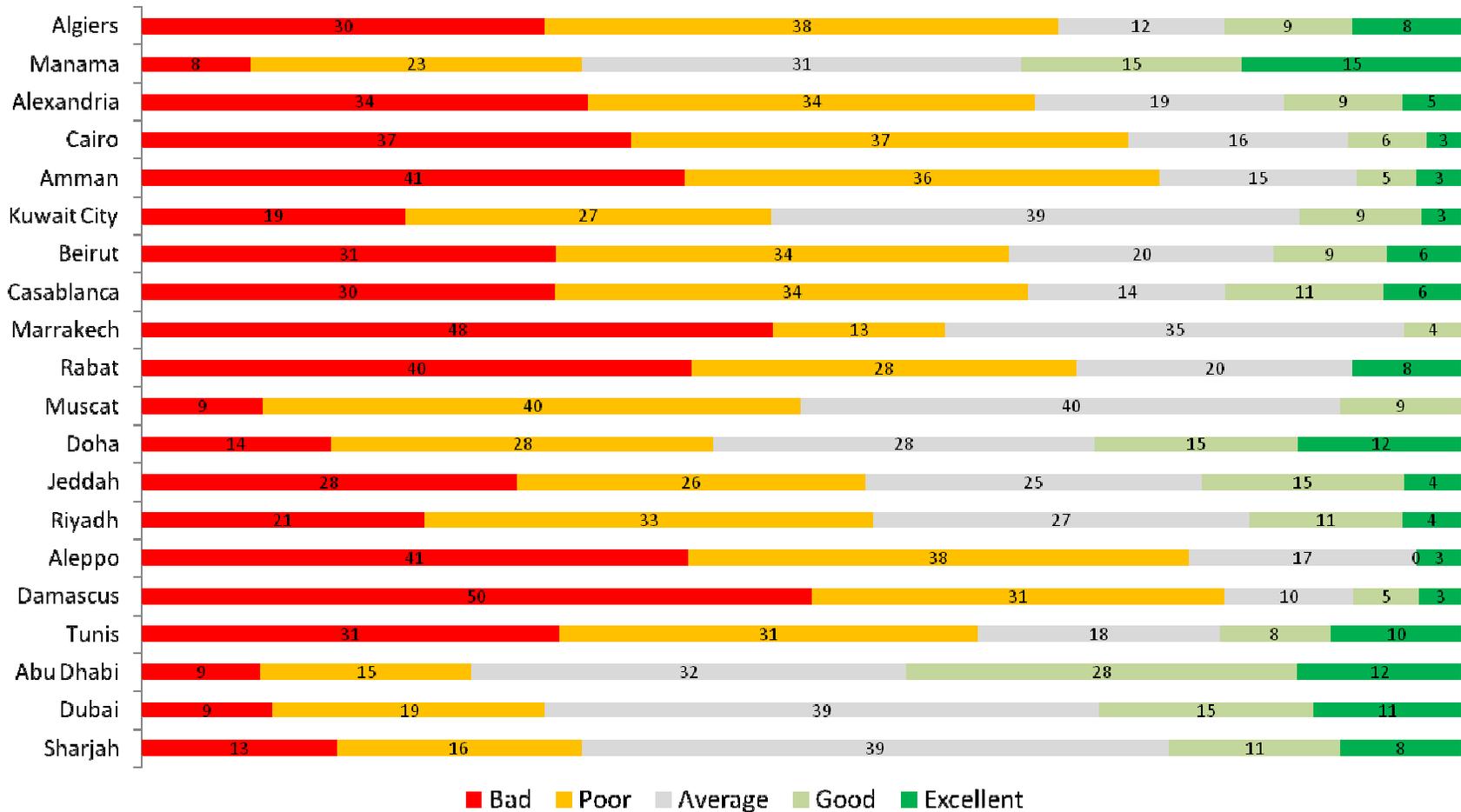
# Ease of starting up a new business



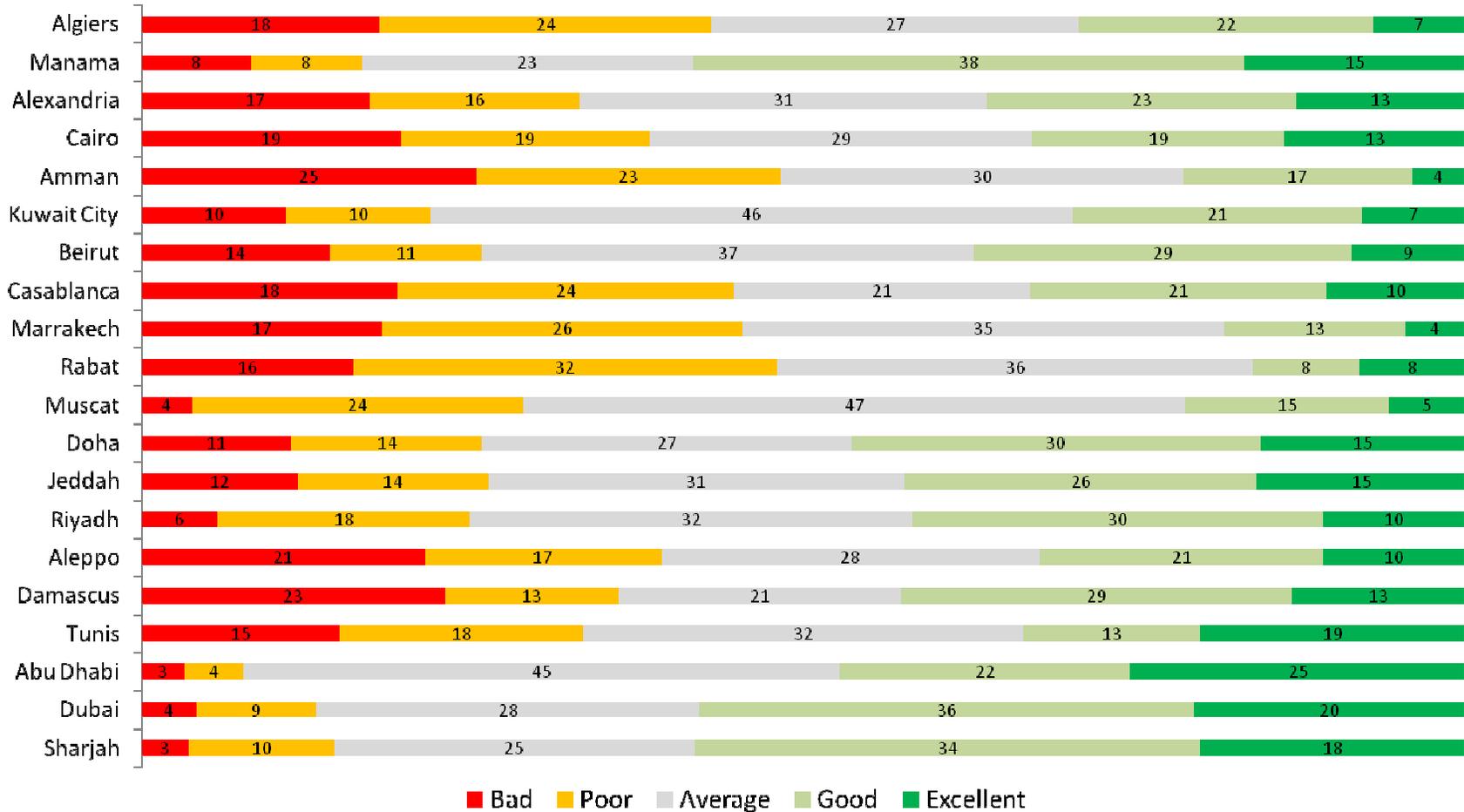
# Lack of bureaucracy in procedures and paperwork



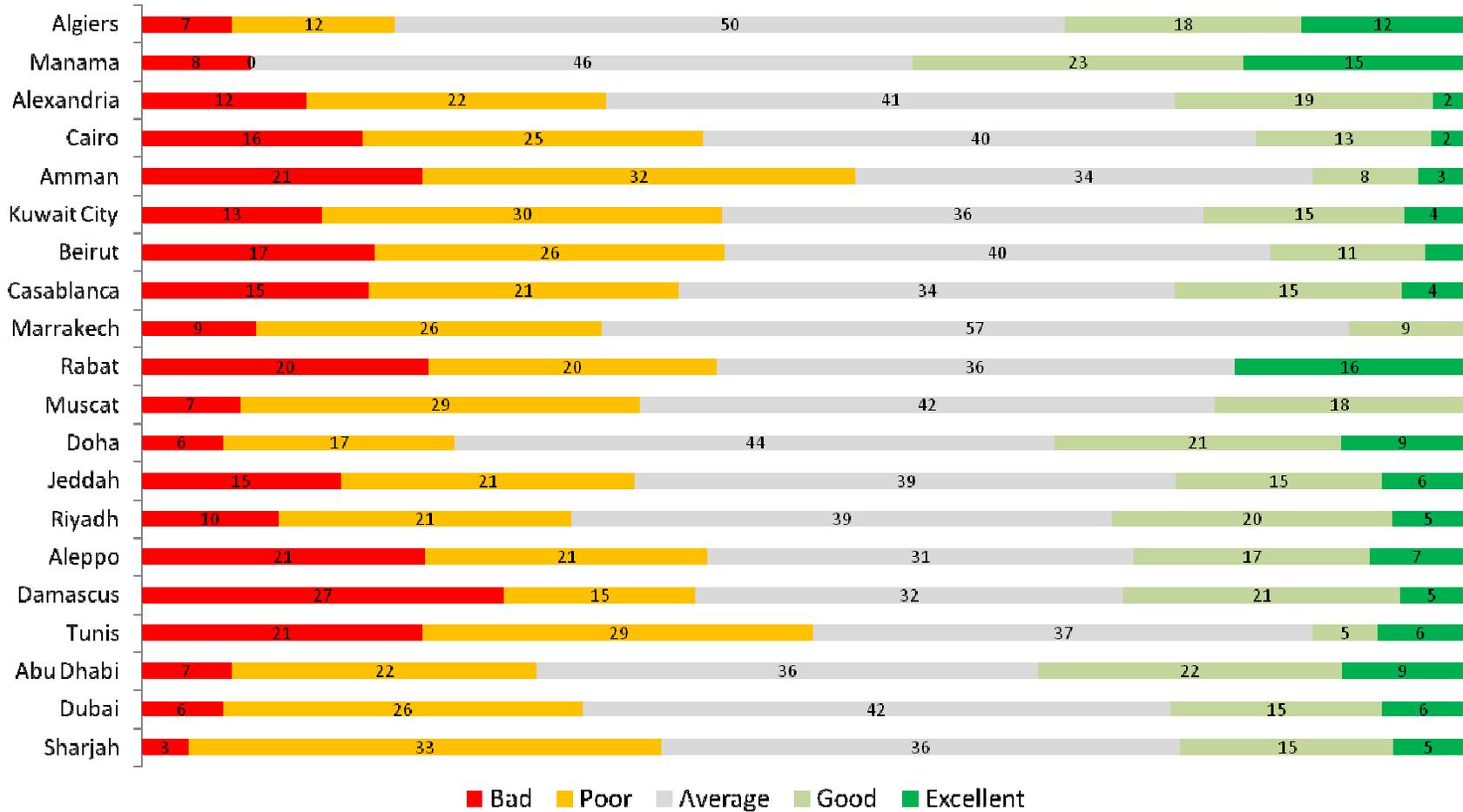
# Ease of finding finances to start a business



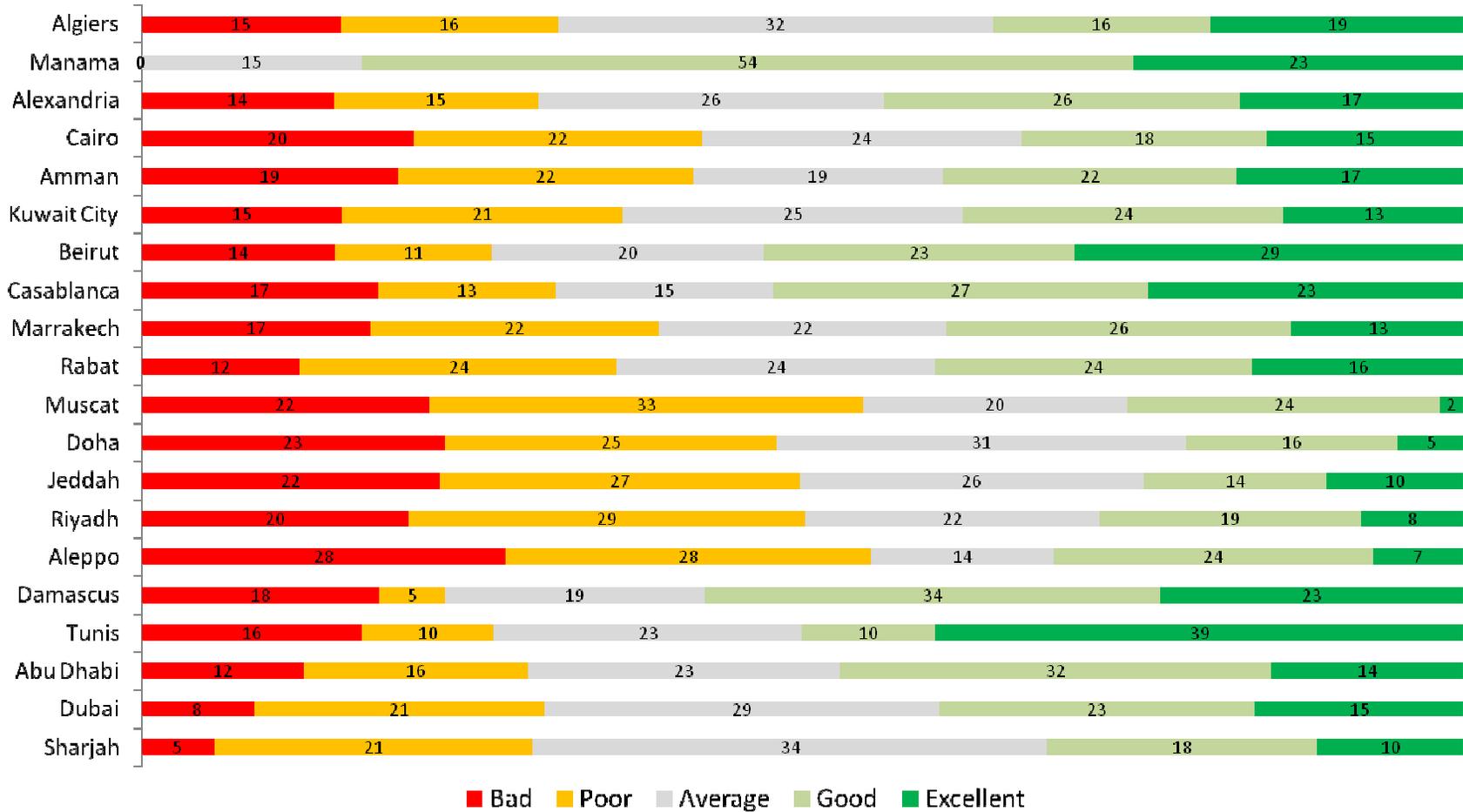
# Market willingness to accept new ideas and innovations



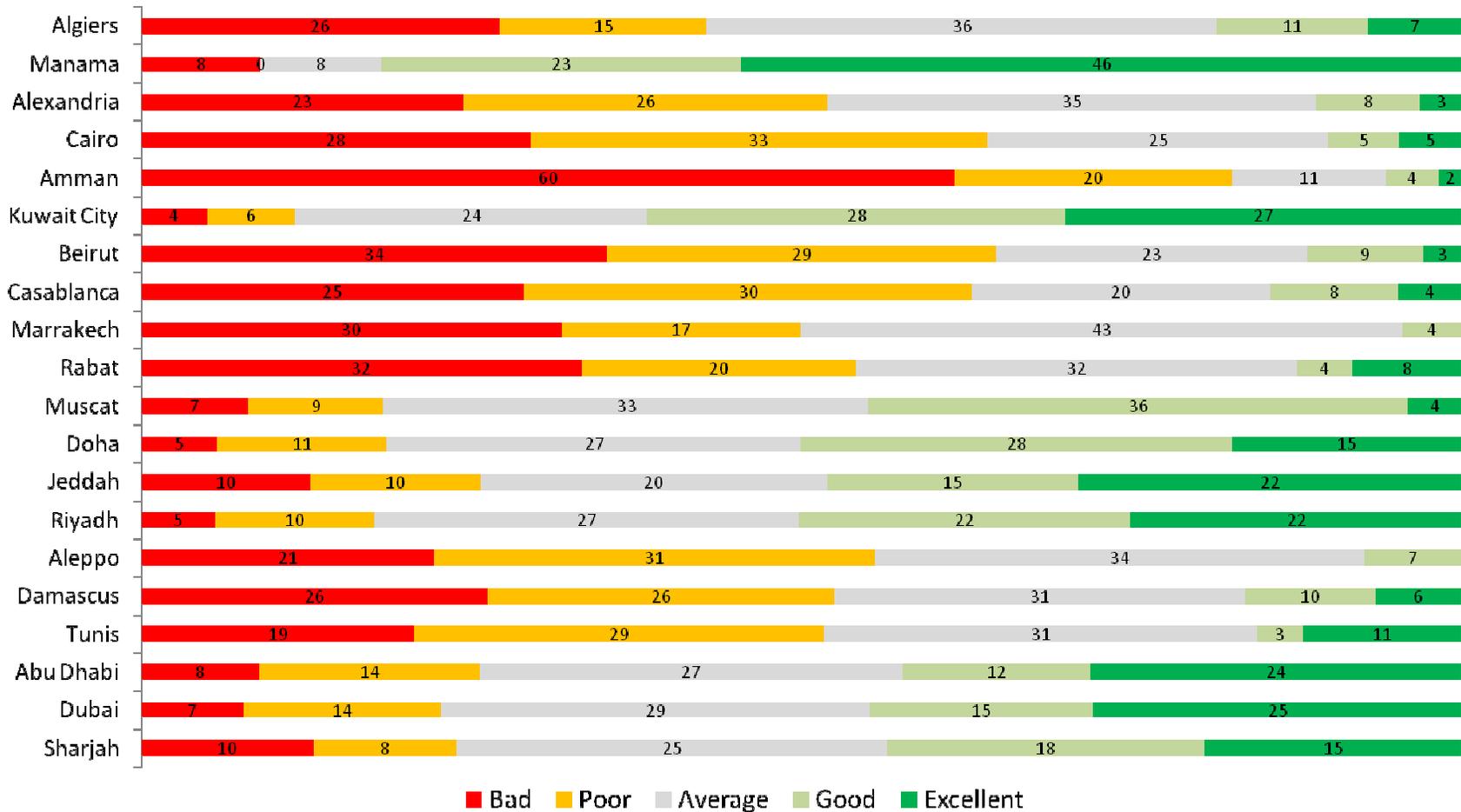
# Lower competition in the market



# Ability to find local talent to employ



# Low fees and tax rates





Section 3

# ^ Labor rights

## Section Overview

In the following section, respondents were asked to rate the city they live in on some 'Labor Rights' related factors that affect one's professional life. The rating was on a 5 point scale where "1" is "Bad" and "5" is "Excellent". The factors that were rated are as follows:

- End-of-service Benefits
- Termination Rights
- Vacation Allowances
- Parenthood Allowances
- Wage Protection System
- Health insurance provision

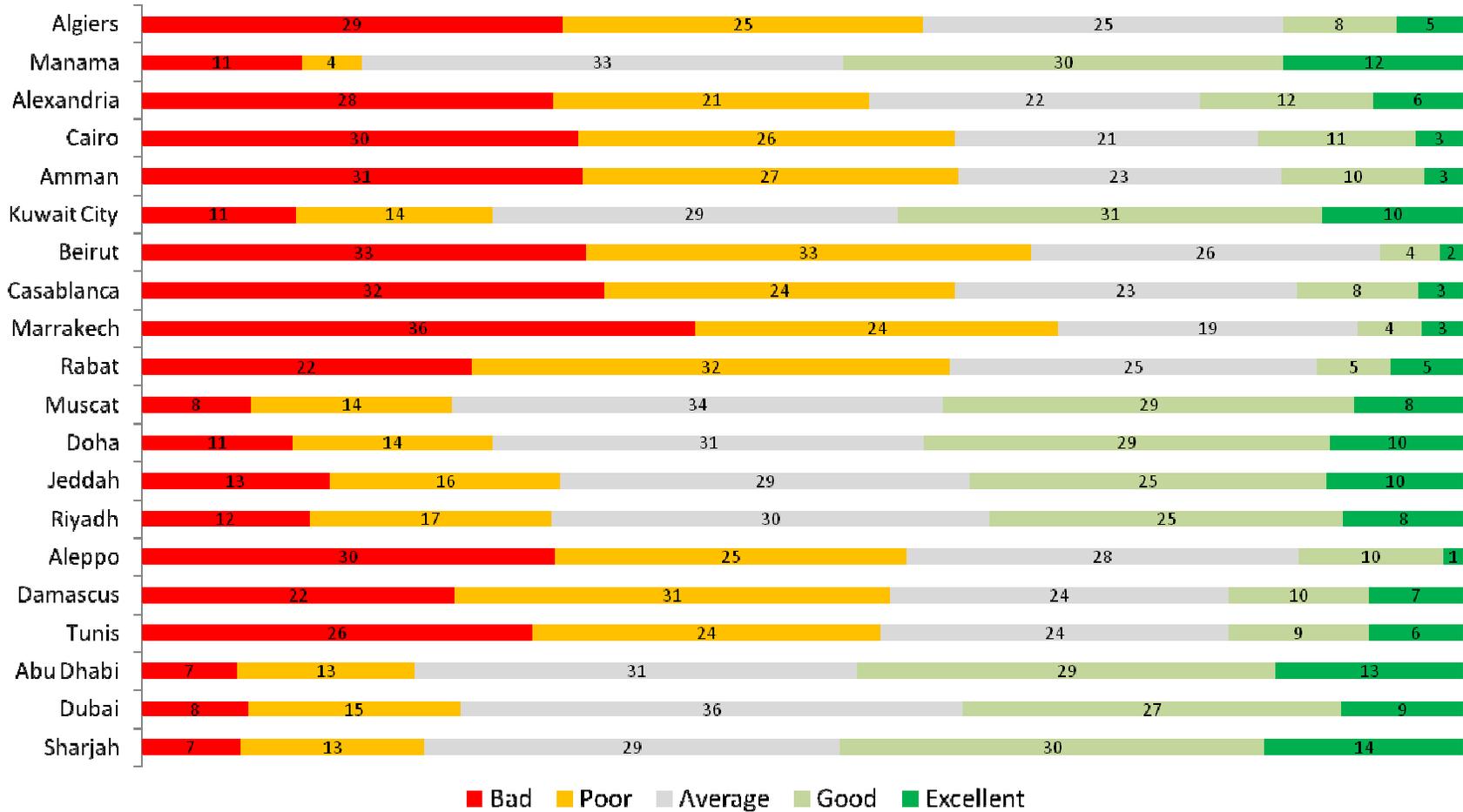
## Summary

- In terms of ‘End of Service benefits’, apart from the GCC countries, residents of all other regions indicate lower ratings, in particular residents of Morocco and Lebanon.
- ‘Vacation allowances’ not very common in the region as most of the cities have been rated as average by their residents.
- ‘Wage protection system’ appears to be well set in the UAE. Other cities in the region have been rated negatively, especially Beirut.
- ‘Health insurance provision’ is an element where GCC cities perform extremely well, probably a function of the country’s labor laws.

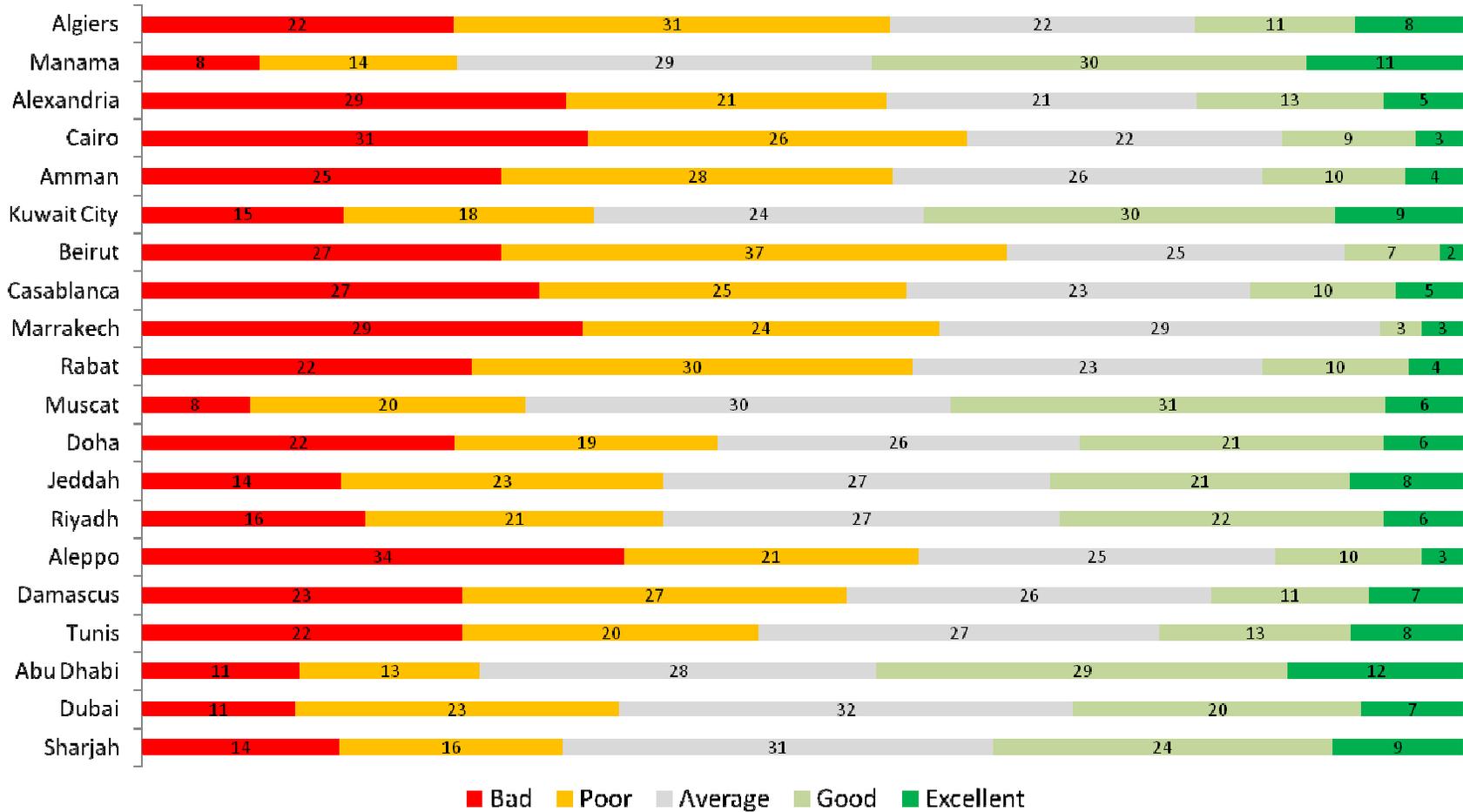
## Top Performers

- Cities that were rated highly by the residents on 'Labor Rights' are:
  - Abu Dhabi
  - Sharjah
  - Manama
  - Doha / Dubai / Kuwait City
  - Jeddah

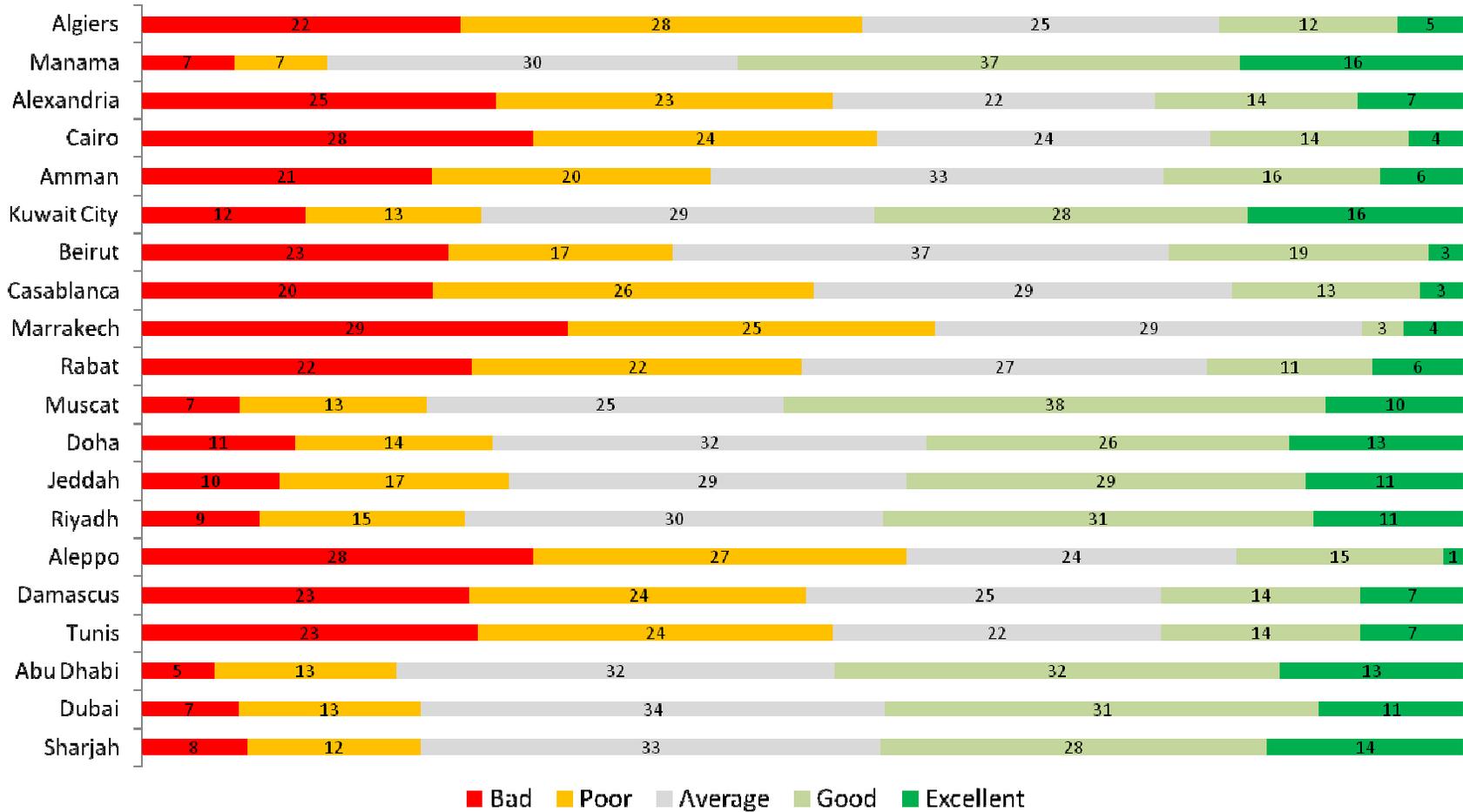
# End-of-service Benefits



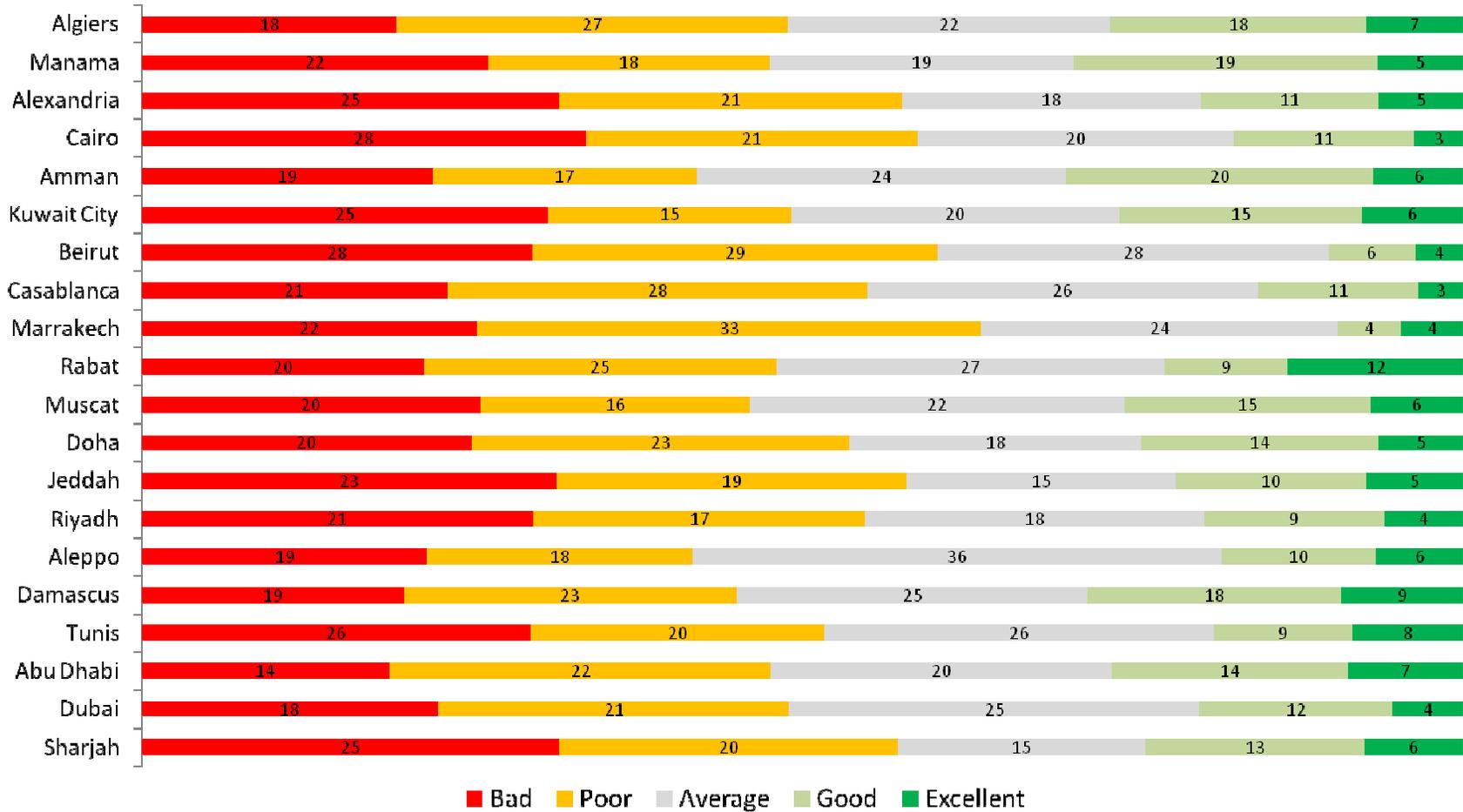
# Termination Rights



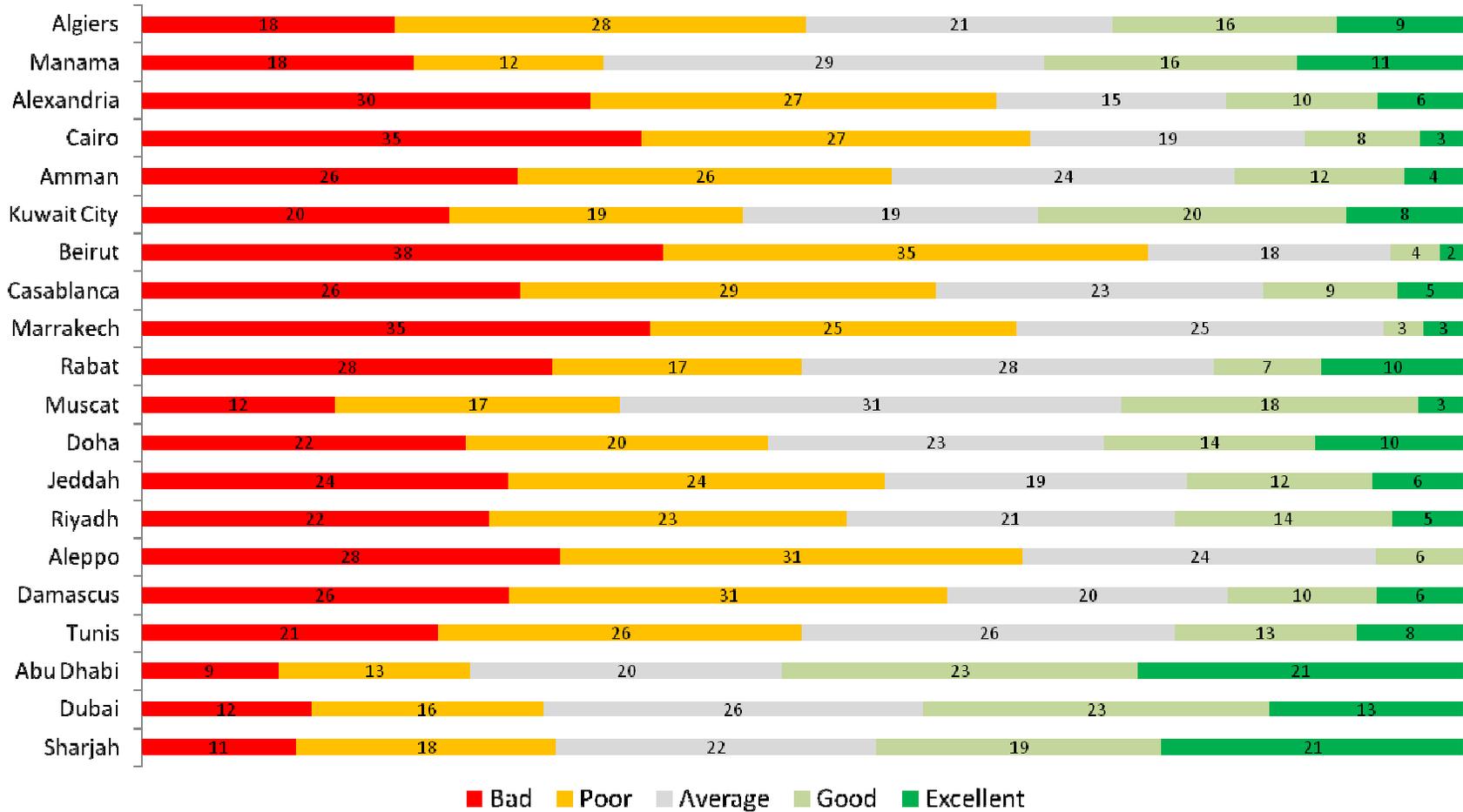
# Vacation Allowances



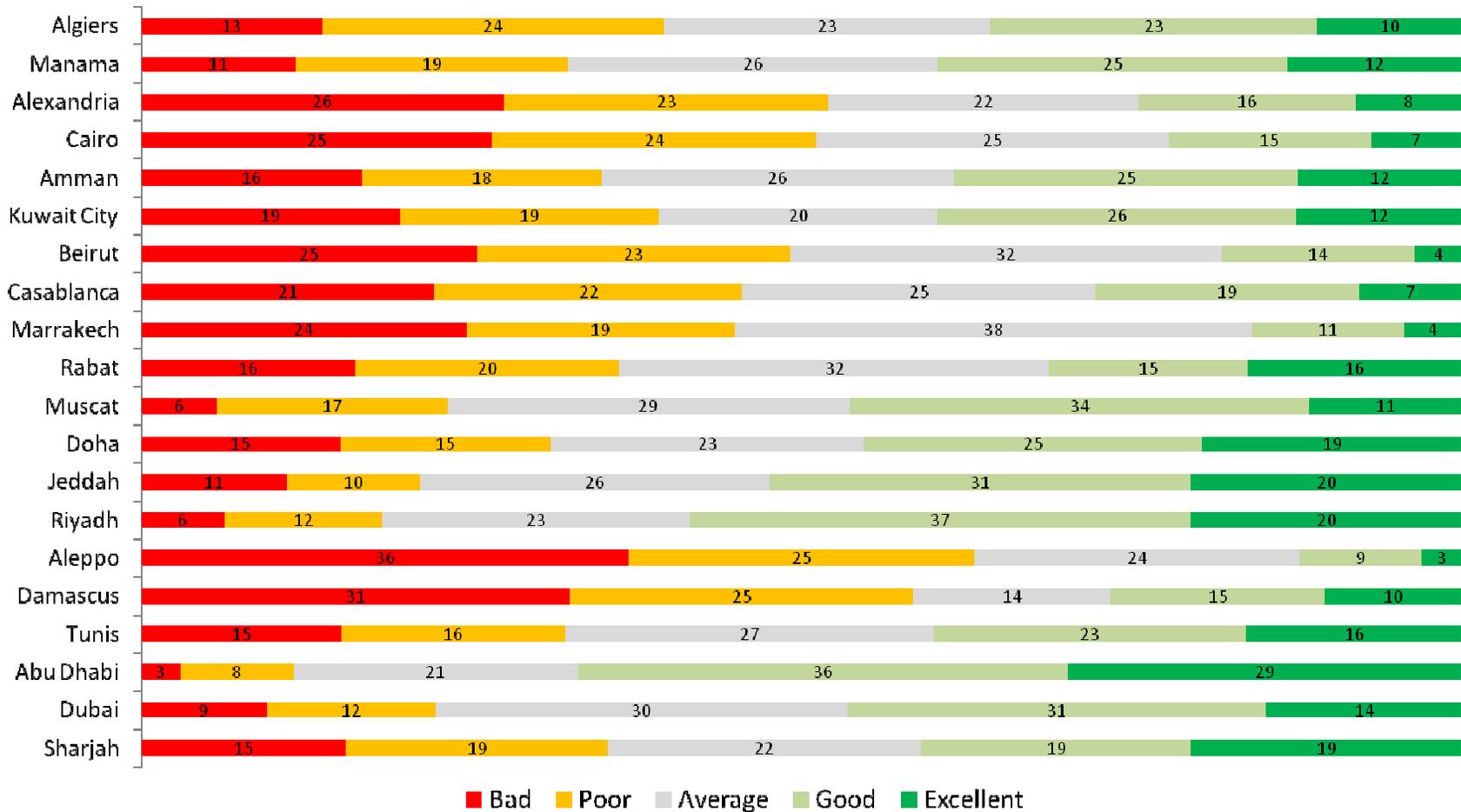
# Parenthood Allowances



# Wage Protection System



# Health insurance provision





Section 4

## Environmental factors

## Section Overview

In the following section, respondents were asked to rate the city they live in on some 'Environmental Factors' that affect one's life in the city. The rating was on a 5 point scale where "1" is "Bad" and "5" is "Excellent". The factors that were rated are as follows:

- Cleanliness of streets and roads
- Levels of air pollution
- Levels of water pollution
- Levels of noise pollution
- Green Space (trees, plants on sideways/ streets etc.)

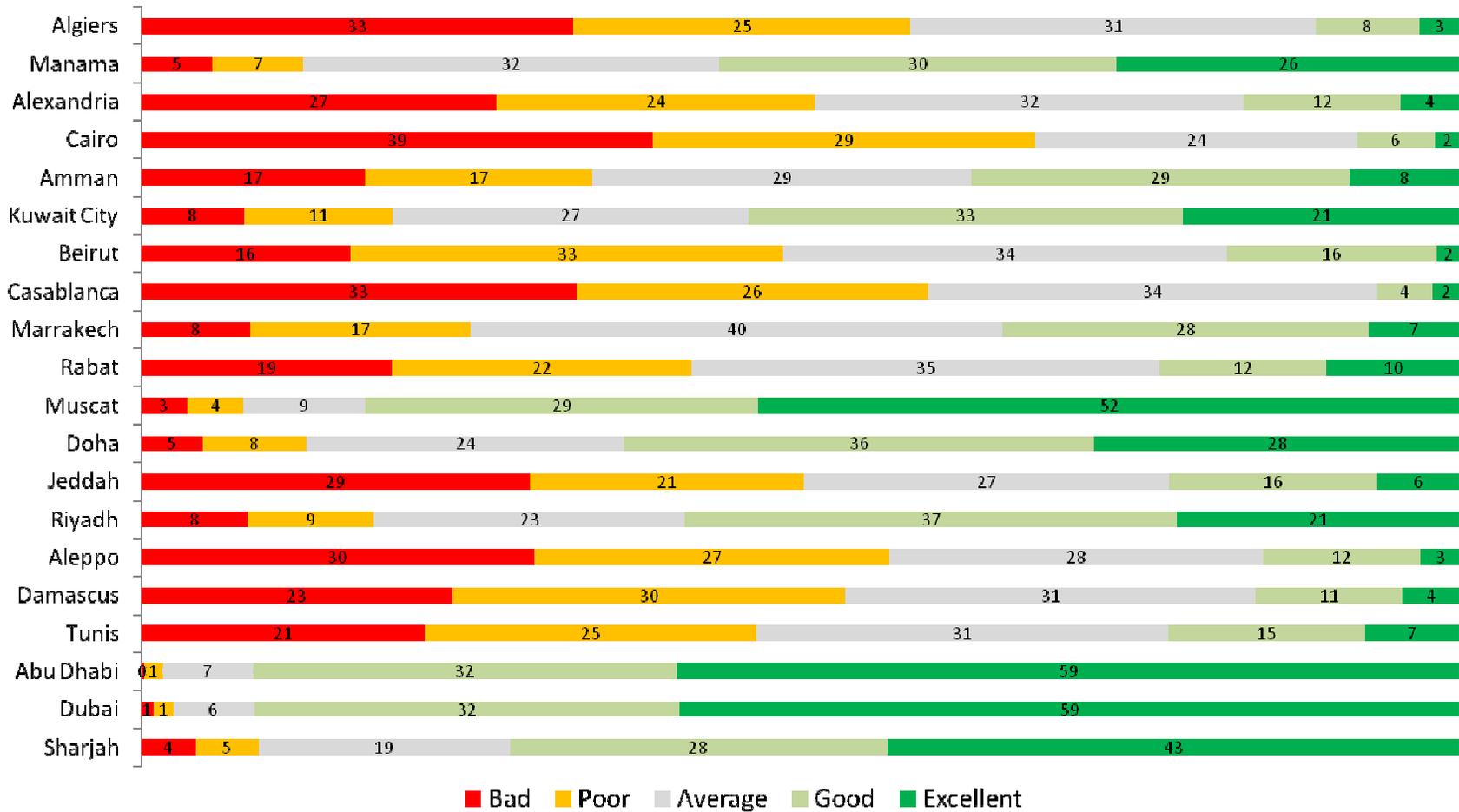
## Summary

- Overall, Muscat performed well on most parameters that contribute to the 'Environmental Factors'
- 91% of the residents of Abu Dhabi and Dubai rate their city positively (59% said excellent and 32% said good) in terms of 'Clean streets and roads', this being highest in the region. Muscat follows with 81% (52% excellent and 29% good).
- Muscat (70% with 21% Excellent and 49% Good) takes the lead when it comes to lower levels of air pollution. The three UAE emirates of Abu Dhabi, Dubai and Sharjah take the second, third and fourth spots respectively.
- Again, Muscat takes the top spot in terms of noise pollution with 71% indicating low levels. Also 64% of Abu Dhabi residents have a similar opinion.
- Muscat and Abu Dhabi share the top spot in terms of 'green space' with 68% of the residents in both cities giving a positive rating.

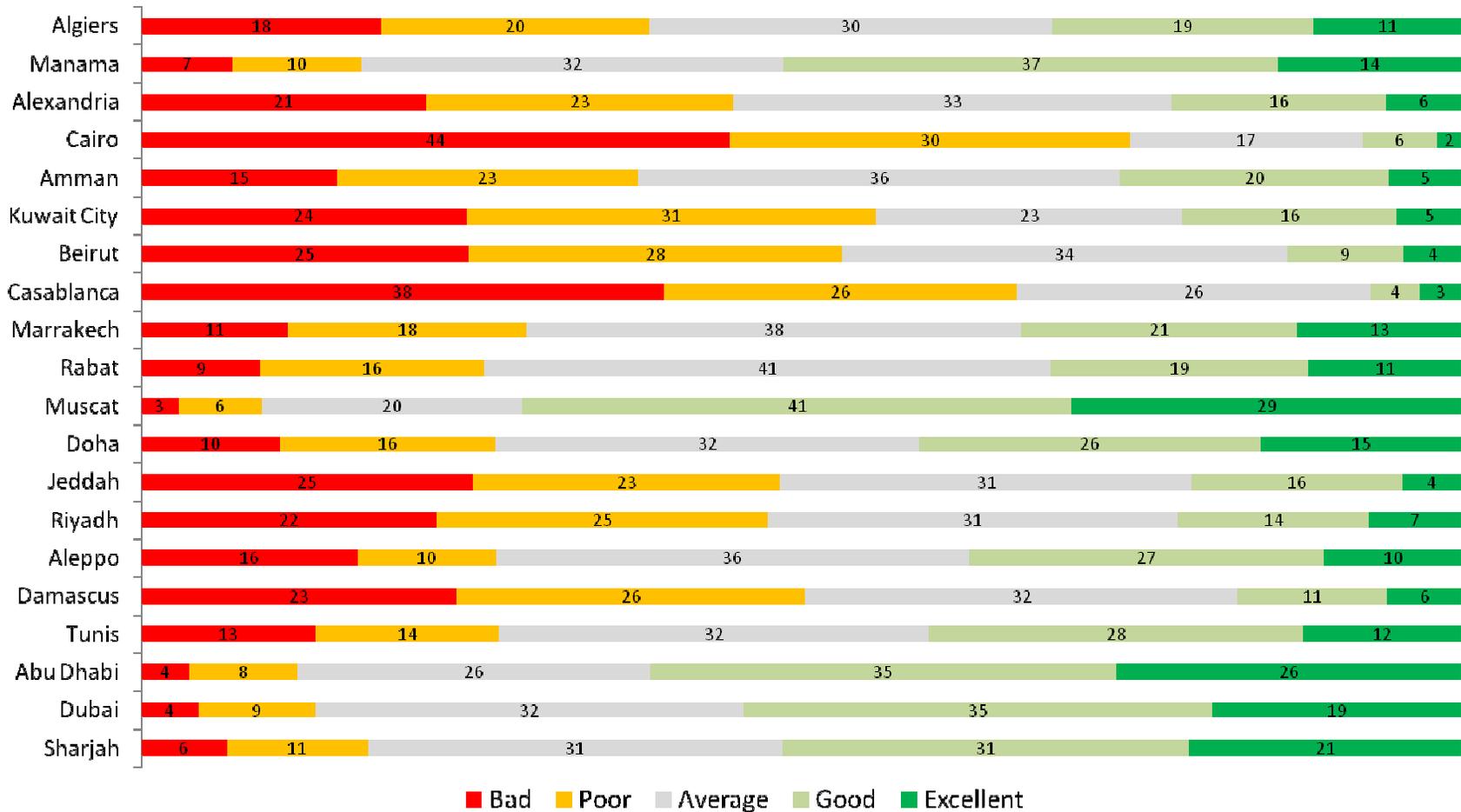
## Top Performers

- Cities that were rated highly by the residents on 'Environmental Factors' are:
  - Muscat
  - Abu Dhabi
  - Dubai
  - Sharjah
  - Doha

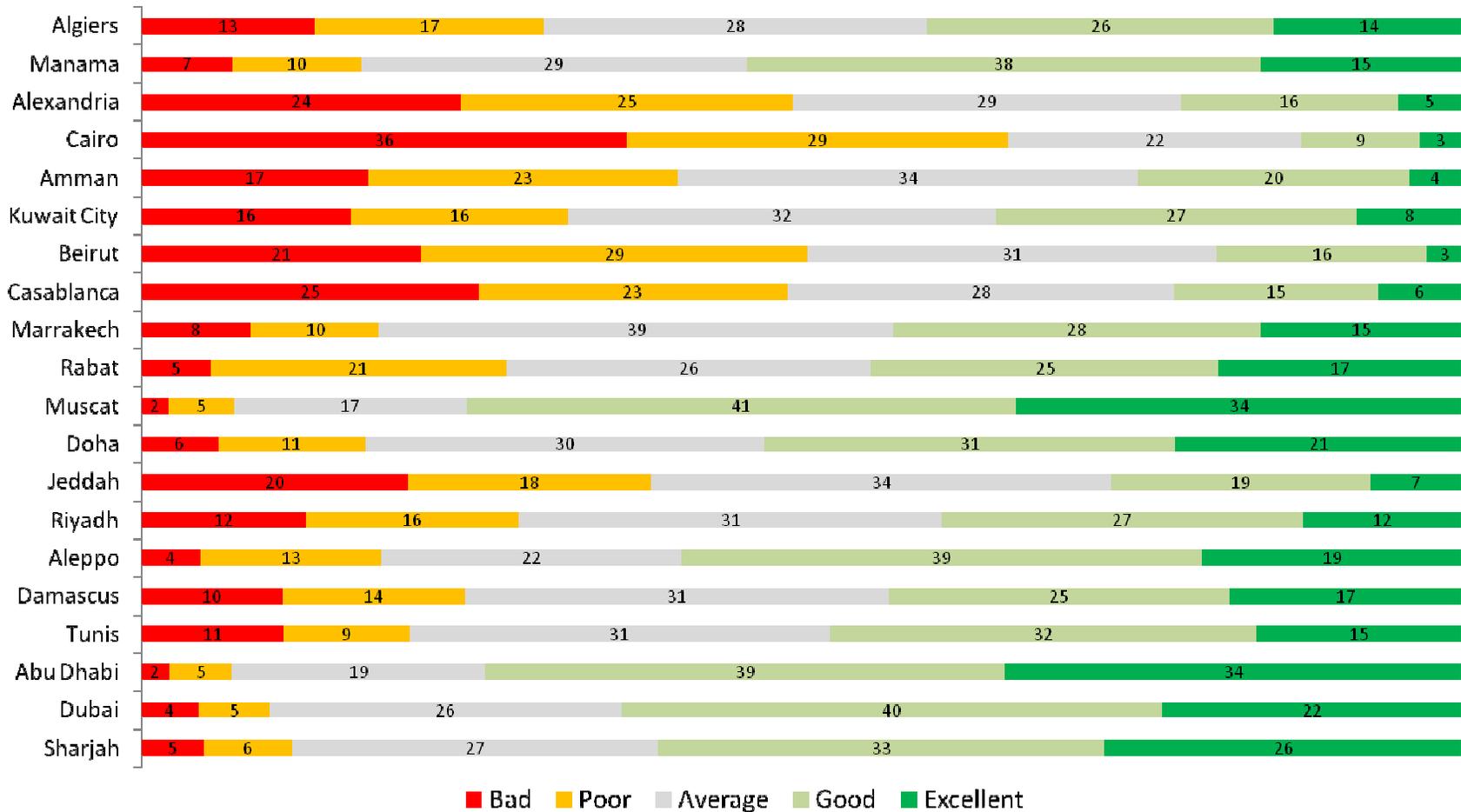
# Clean streets and roads



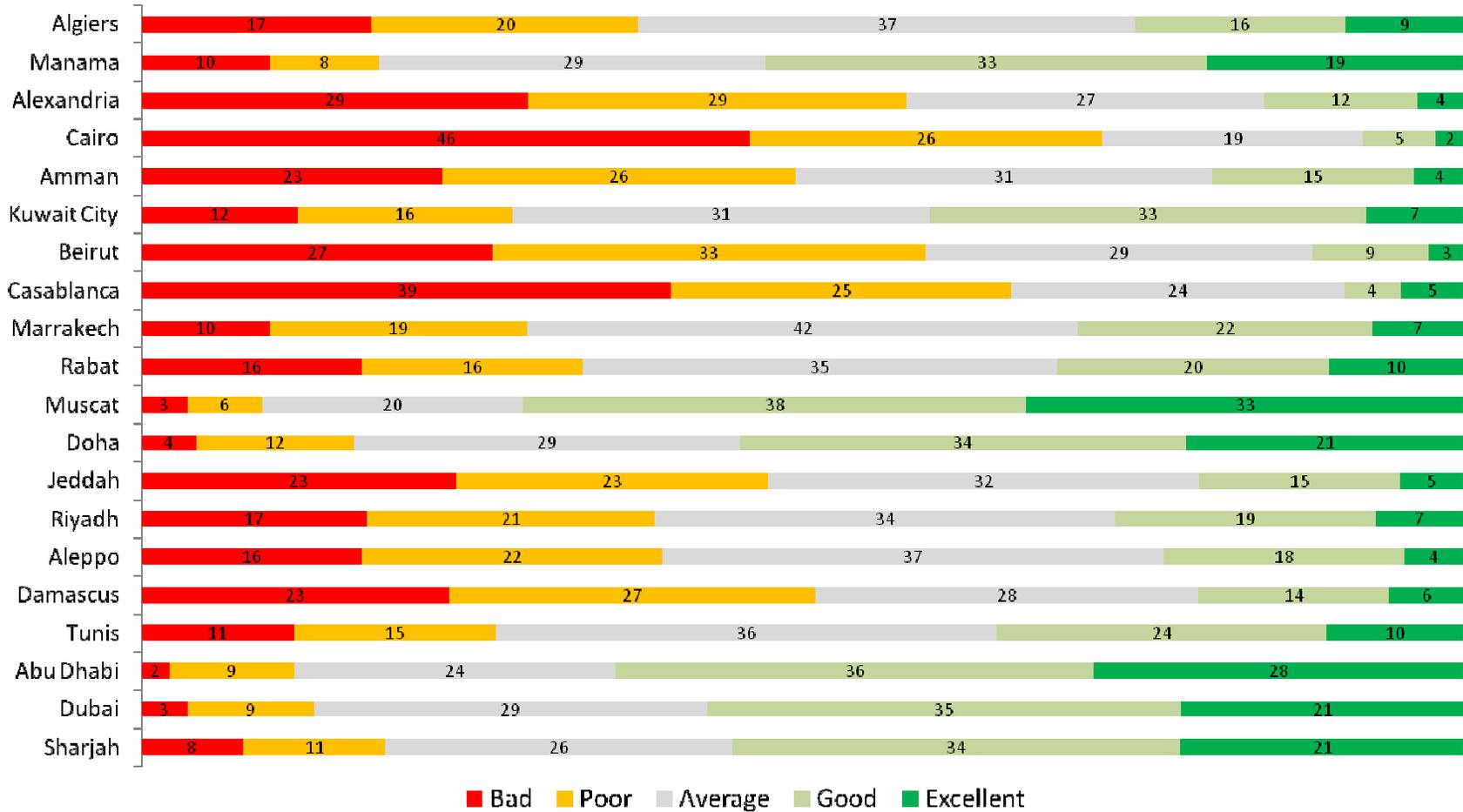
# Low levels of air pollution



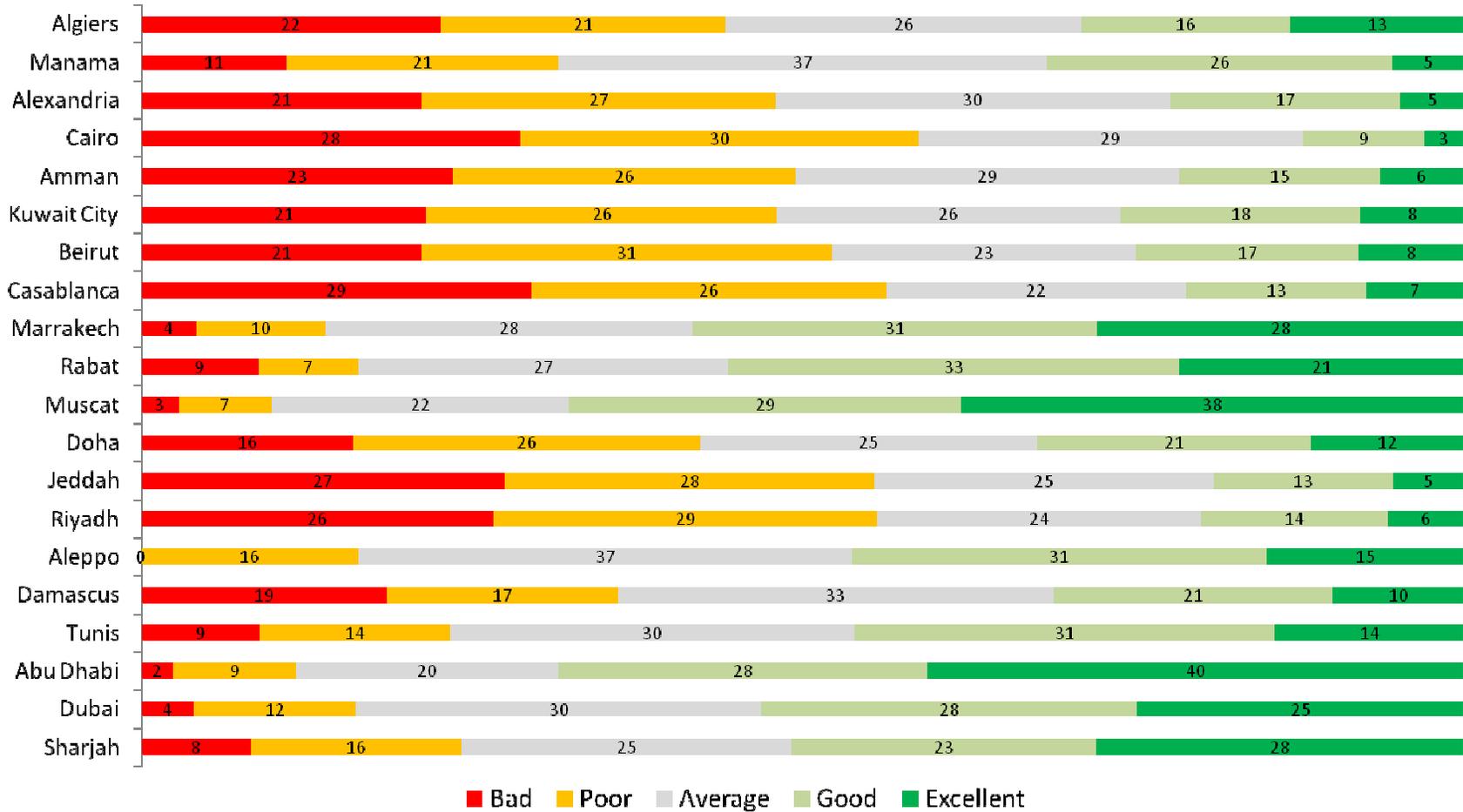
# Low levels of water pollution



# Low levels of noise pollution



# Green Space (trees, plants on sideways/ streets etc.)





Section 5

# Everyday life

## Section Overview

In the following section, respondents were asked to rate the city they live in on some 'Everyday Life' elements that affect one's life in the city. The rating was on a 5 point scale where "1" is "Bad" and "5" is "Excellent". The factors that were rated are as follows:

- Availability of parks/ community gardens
- Availability of health care facilities (i.e. hospitals, qualified doctors)
- Quality of available health care facilities
- Availability of Utility Systems (Water/ Electricity/ Sewage systems)
- Accessibility of public transportation system
- Quality of accessible public transportation system
- Low Traffic congestion
- Availability of walkways/ footpaths for pedestrians
- Availability of wide range of entertainment avenues (restaurants, cinemas, social activities, etc.)
- Availability of educational facilities
- Quality of available educational facilities
- Ease of access to convenience stores (groceries, supermarkets etc.) in residential areas

## Summary

- 34% of those from Abu Dhabi and 31% in Dubai and Sharjah claim their city is excellent in terms of 'availability of parks/ community gardens'. Lowest rating has been given to Beirut where 31% of the respondents feel it is 'Bad' on this aspect.
- Availability of healthcare facilities appear not to be a major issue in the region as most of the cities receive an above average rating.
- Similar to availability of healthcare facilities, 'quality of available healthcare facilities' is also perceived to be average or above in most of the cities with the exception of Casablanca and Marrakech.
- The residents of Dubai and Abu Dhabi rate their cities very high in terms of the accessibility of public transport. 41% and 34% of Dubai and Abu Dhabi residents respectively rate it as excellent.
- Dubai also leads in terms of the 'quality of public transport' with 43% giving it an excellent rating followed by Abu Dhabi (31%).

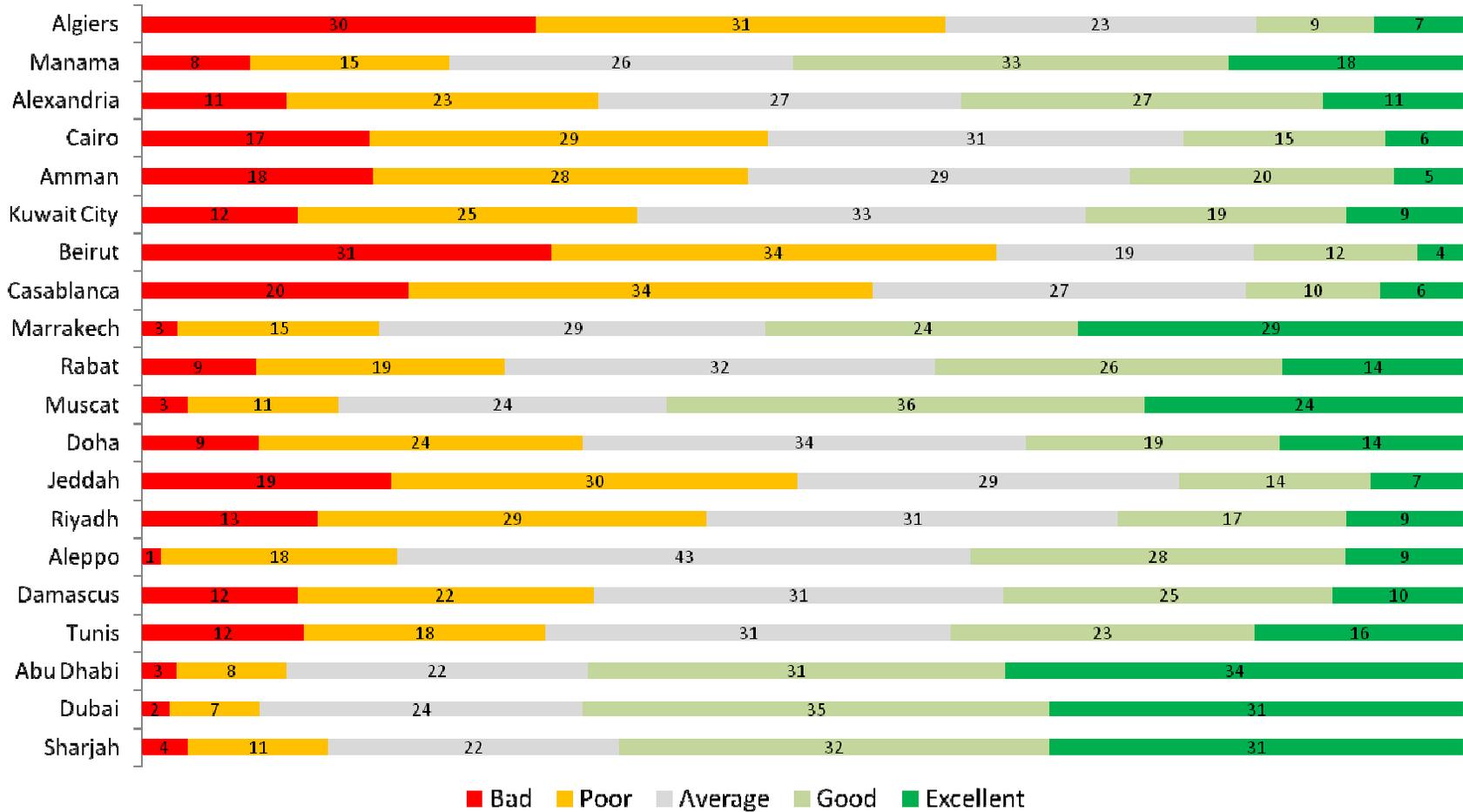
## Summary

- Traffic congestion is a major issue faced by the residents of most of the cities in the region. More so by those residing in Cairo, Beirut and Casablanca.
- Abu Dhabi and Dubai receive extremely positive ratings on ‘availability of walkways/ footpaths for pedestrians’.
- When asked about entertainment facilities, Dubai takes the top spot with 55% of its residents claiming it to be excellent. Beirut comes in second with 52%.
- Beirut is also rated extremely high on the ‘availability’ and ‘quality’ of educational facilities.

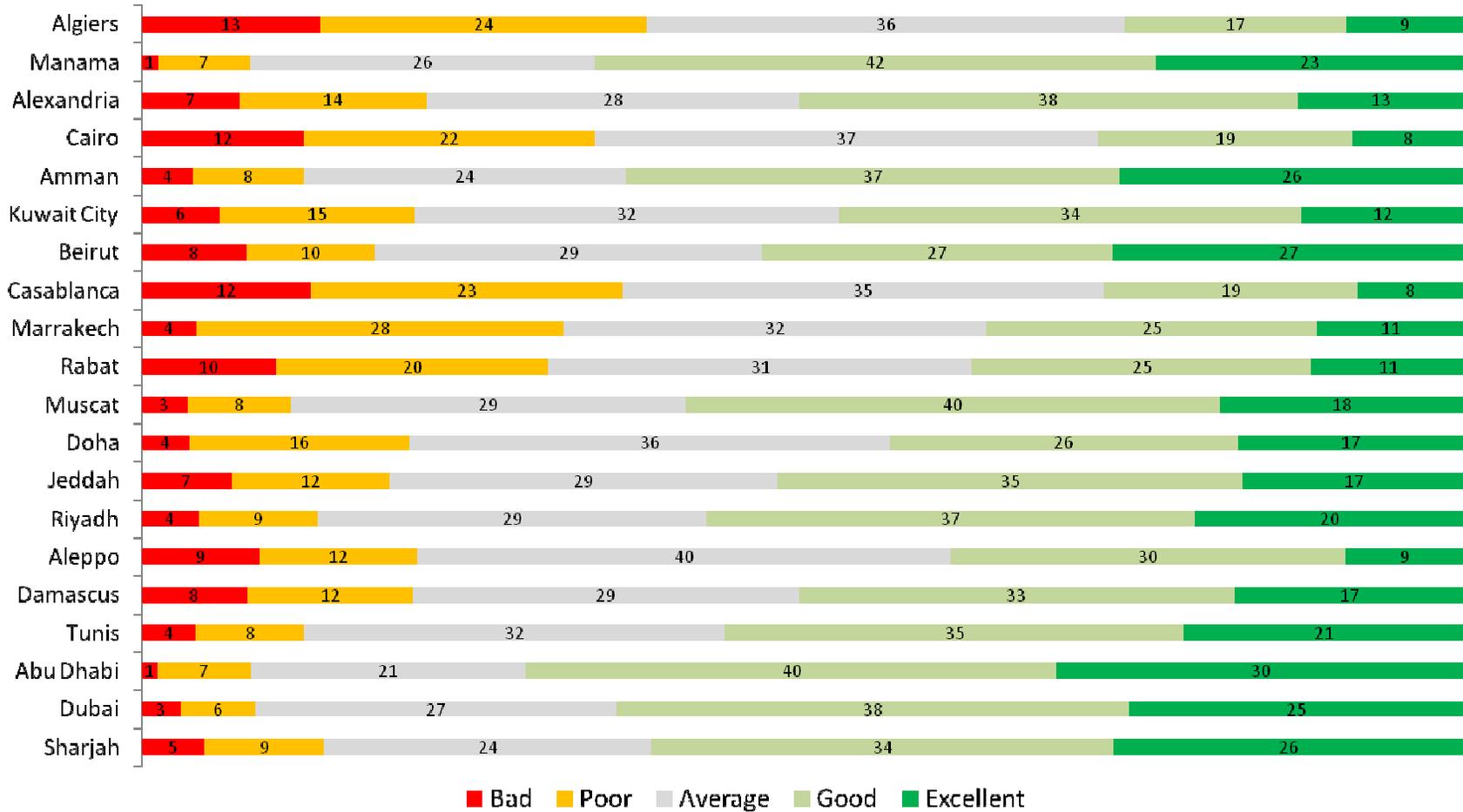
## Top Performers

- Cities that were rated highly by the residents on 'Every day life Elements' are:
  - Abu Dhabi
  - Dubai
  - Sharjah
  - Manama
  - Beirut

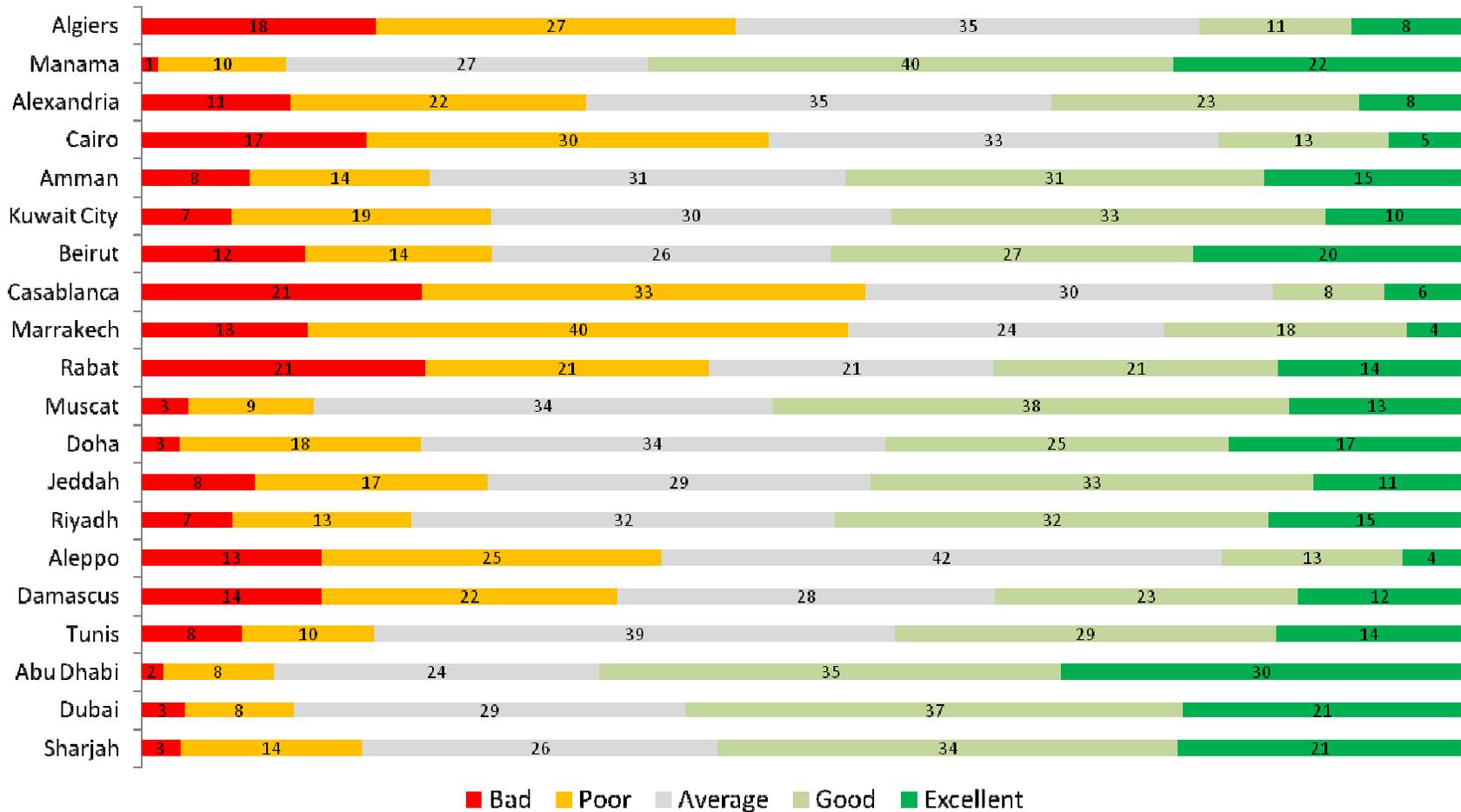
# Availability of parks/ community gardens



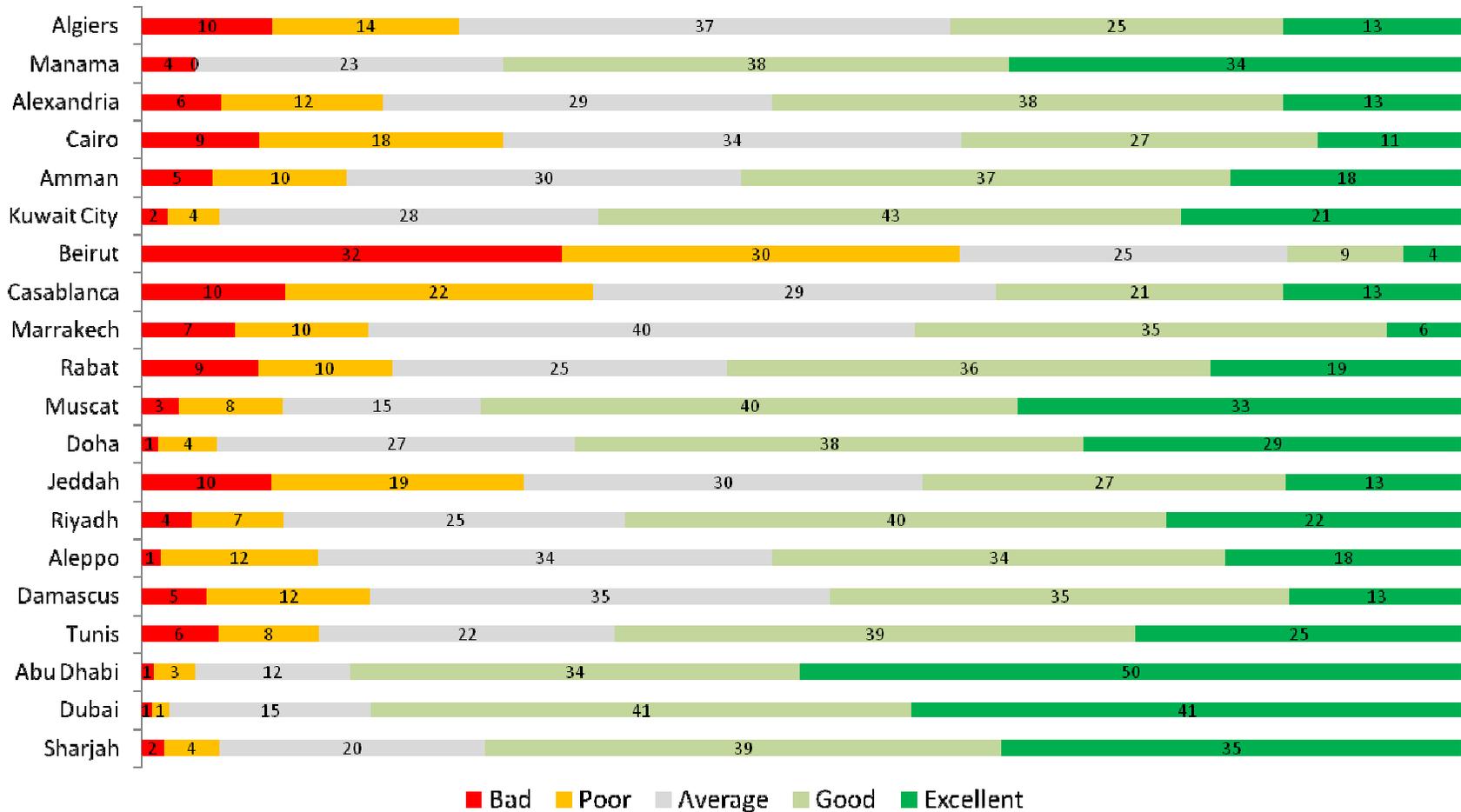
# Availability of health care facilities (i.e. hospitals, qualified doctors)



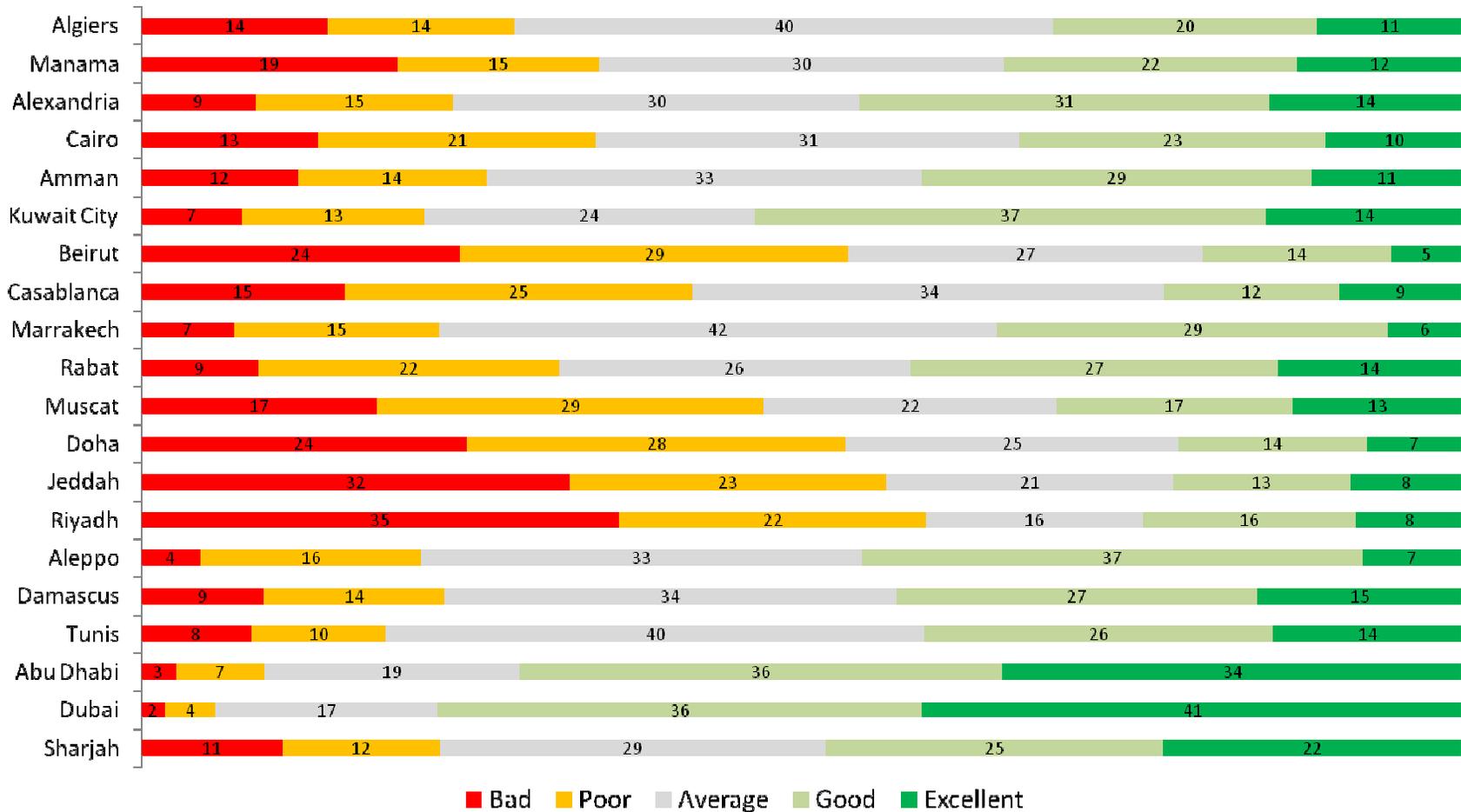
# Quality of available health care facilities



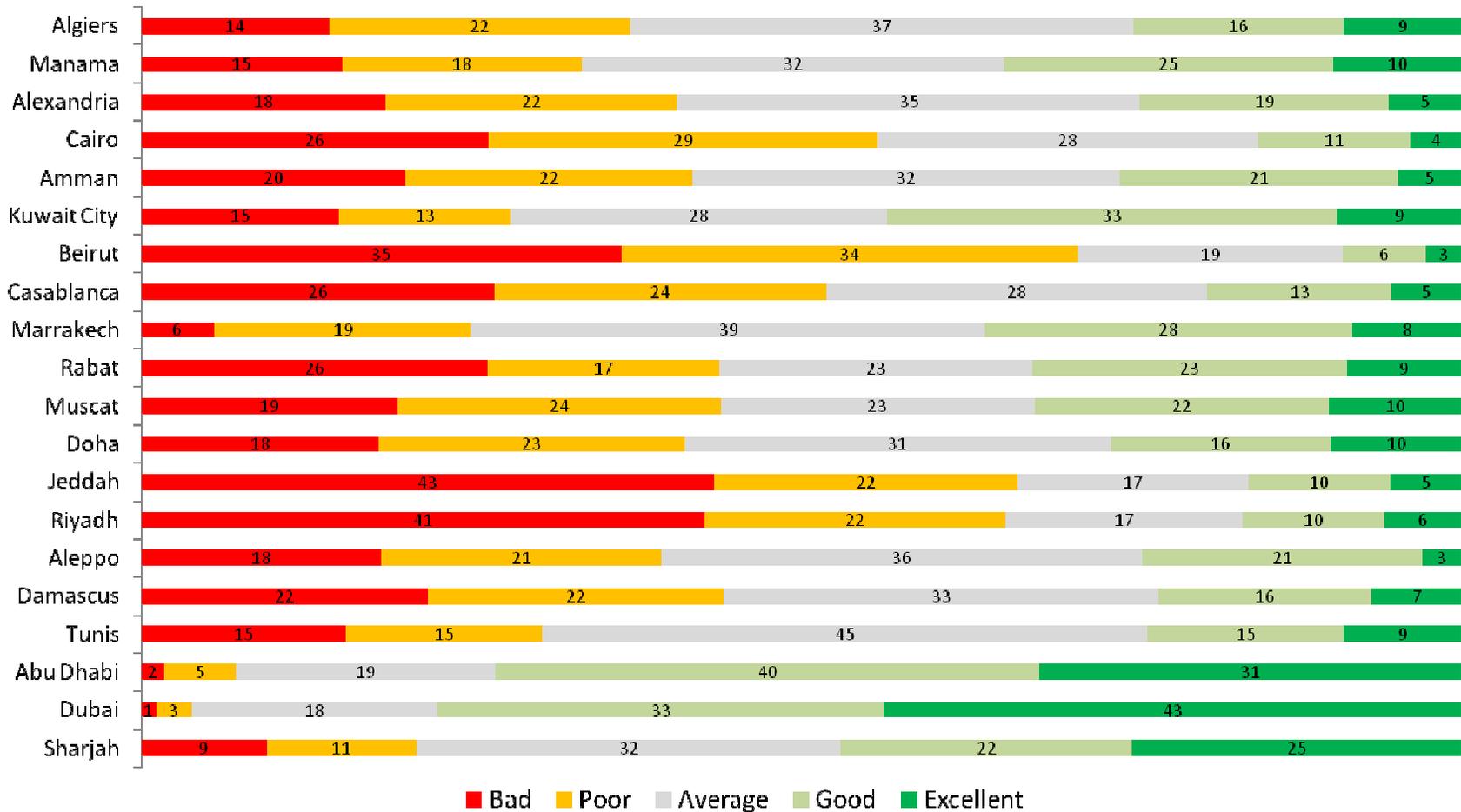
# Availability of Utility Systems (Water/ Electricity/ Sewage systems)



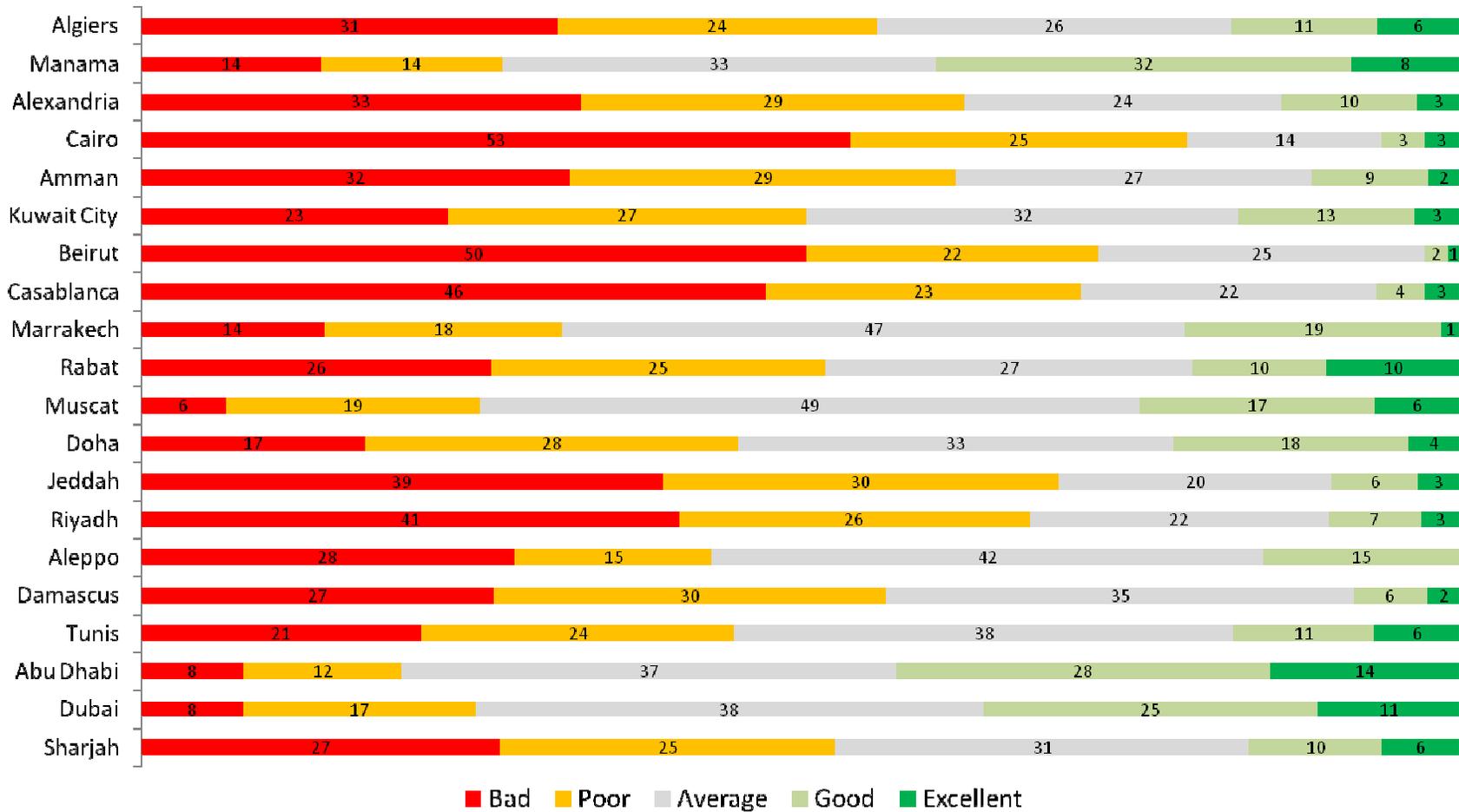
# Accessibility of public transportation system



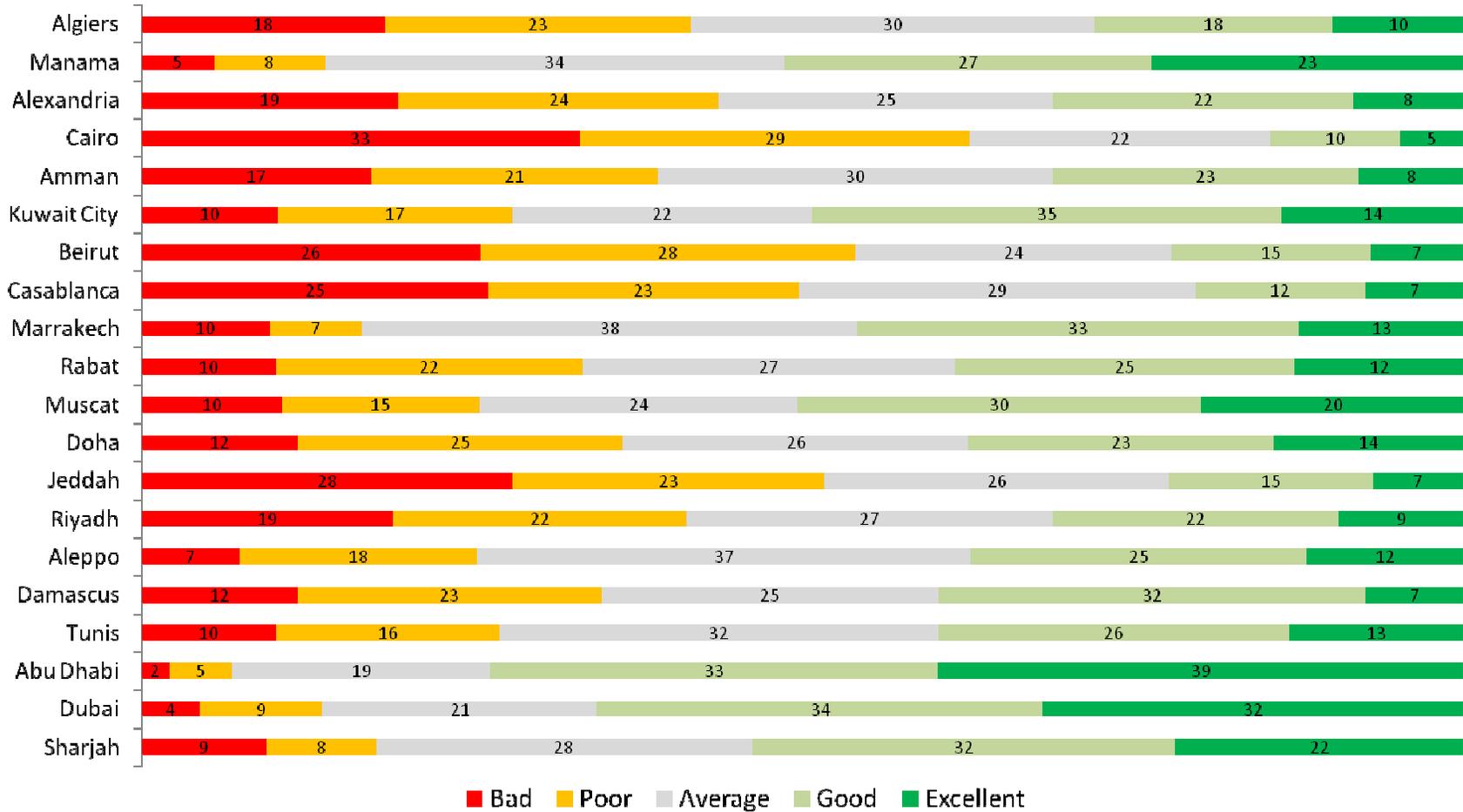
# Quality of accessible public transportation system



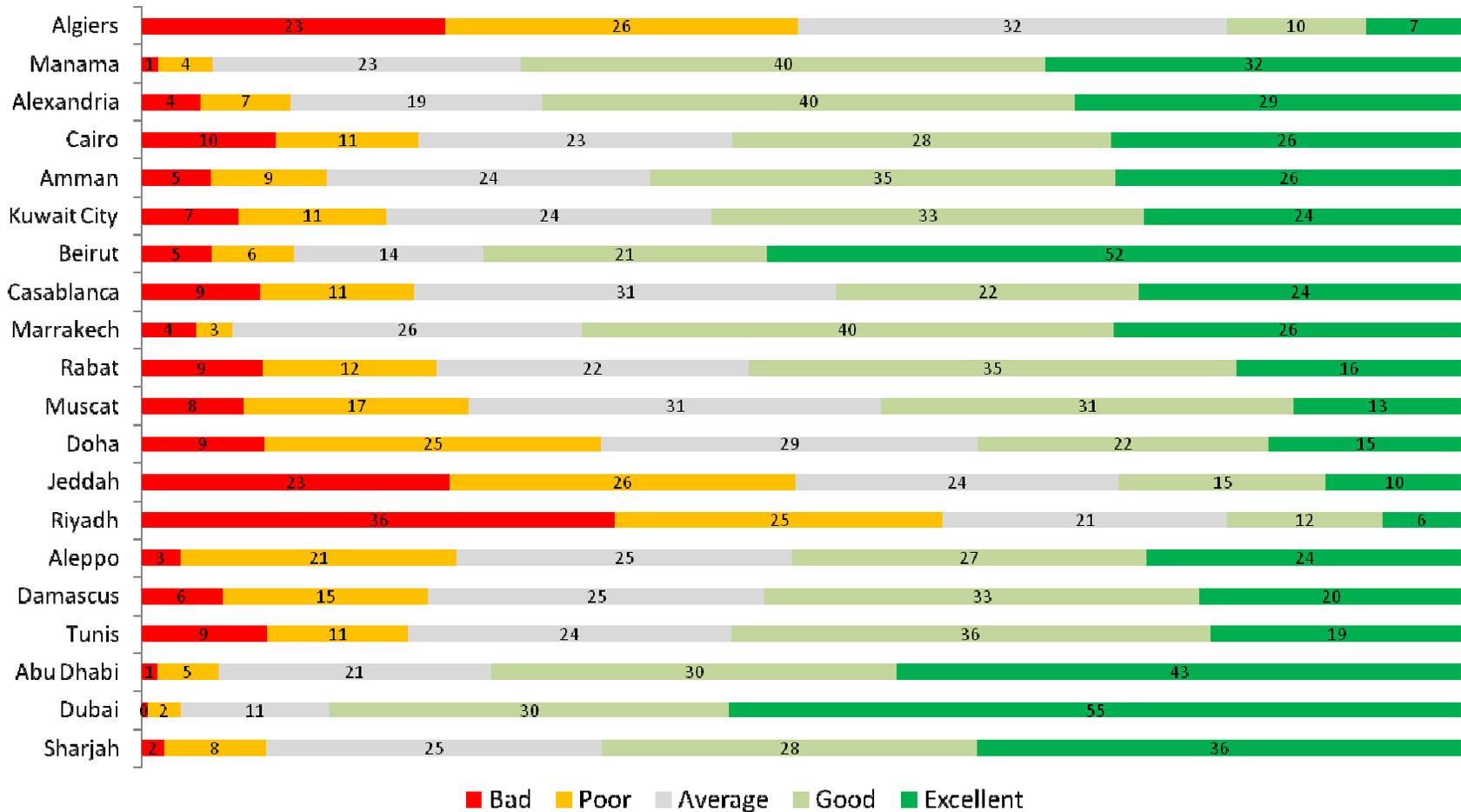
# Low Traffic Congestion



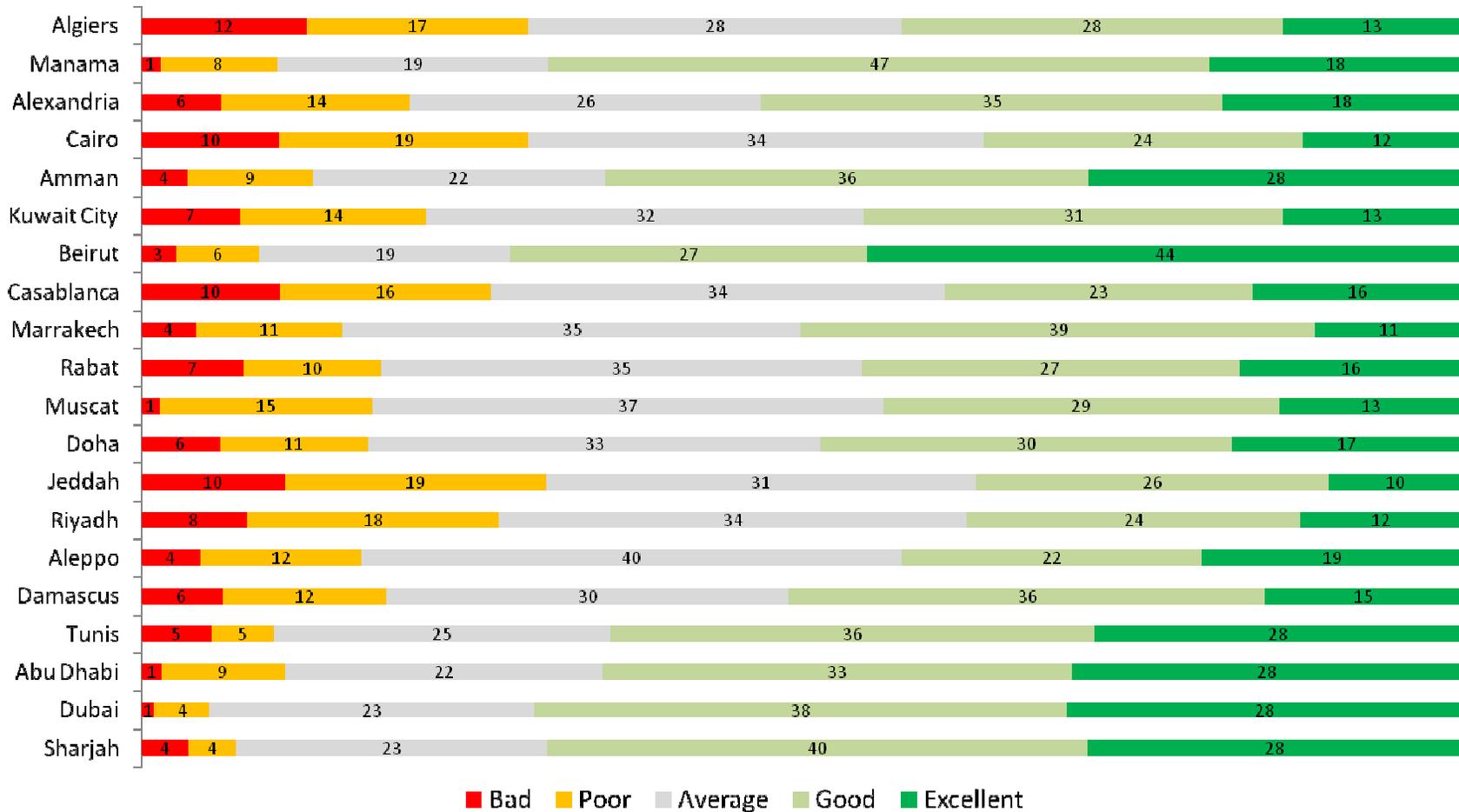
# Availability of walkways/ footpaths for pedestrians



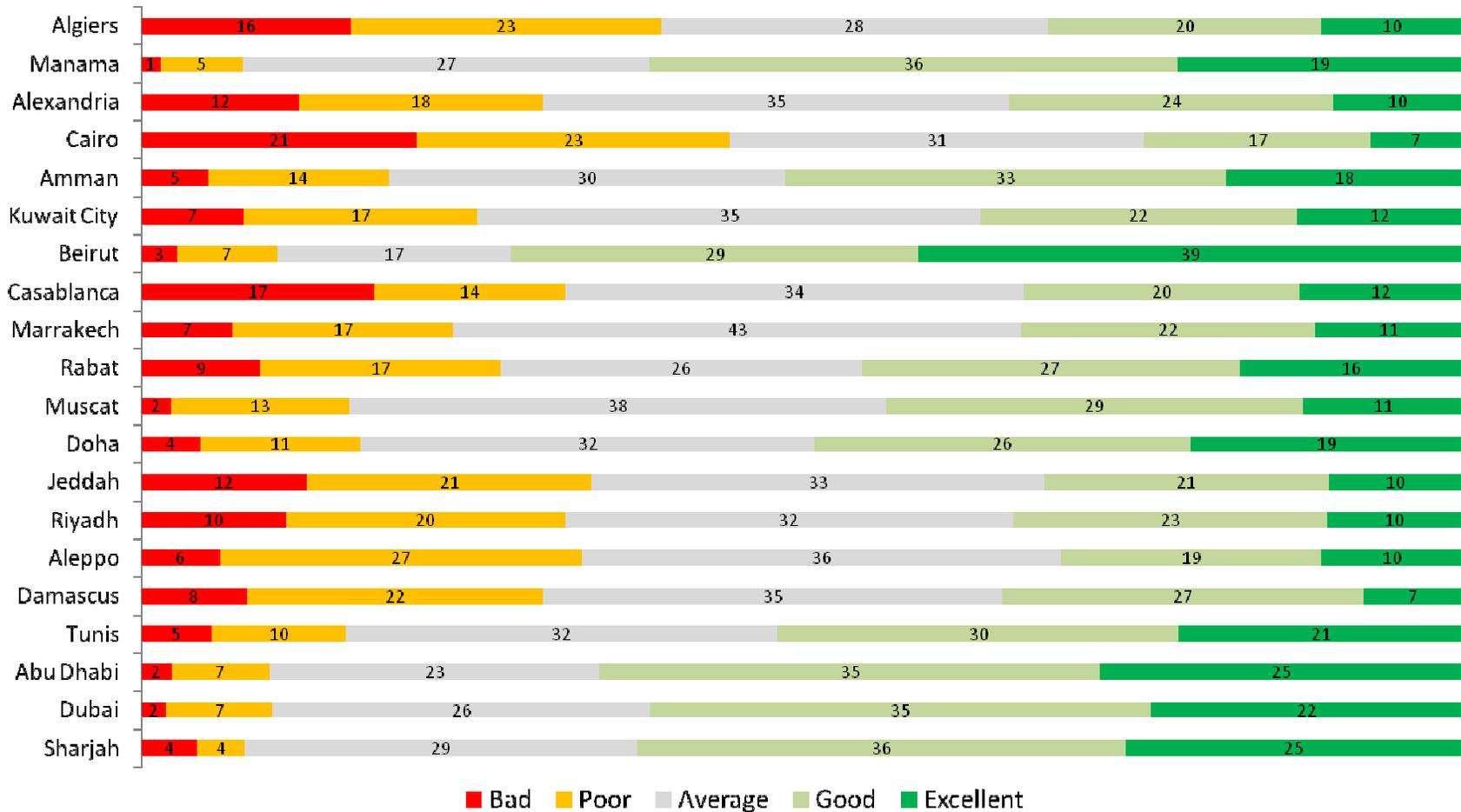
## Availability of wide range of entertainment avenues (restaurants, cinemas, social activities, etc.)



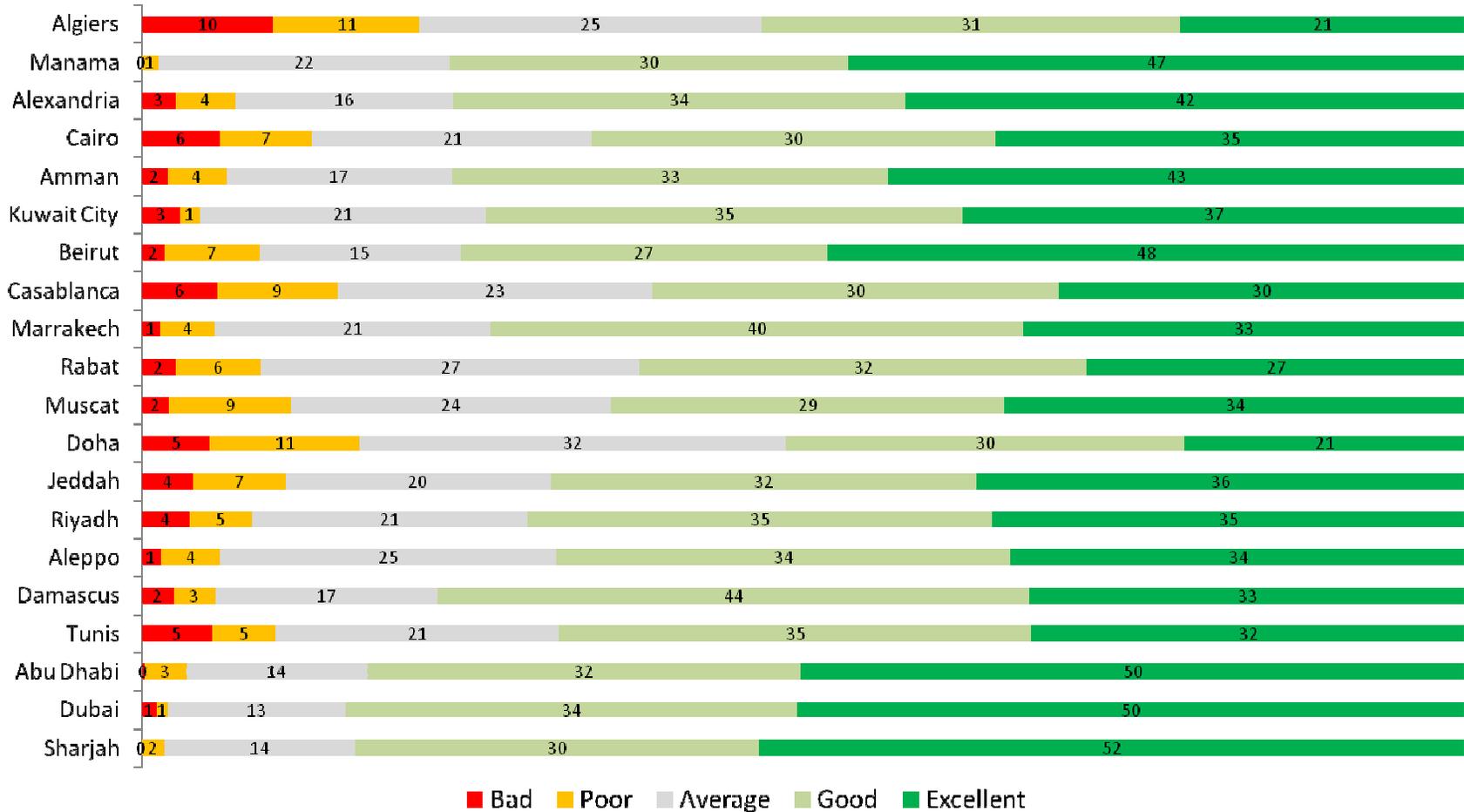
# Availability of educational facilities



# Quality of available educational facilities



## Ease of access to convenience stores (groceries, supermarkets etc.) in residential areas





Section 6

## Socio-cultural factors

## Section Overview

In this last section, respondents were asked to rate the city they live in on some ‘Socio-Cultural Factors’ that affect one’s life in the city. The rating was on a 5 point scale where “1” is “Bad” and “5” is “Excellent”.

The factors that were rated are as follows:

- Equality amongst both genders
- Fair treatment to all nationalities
- Stable political environment
- Low crime rates
- Effective law enforcement
- Freedom of expression
- Tolerance to different cultures

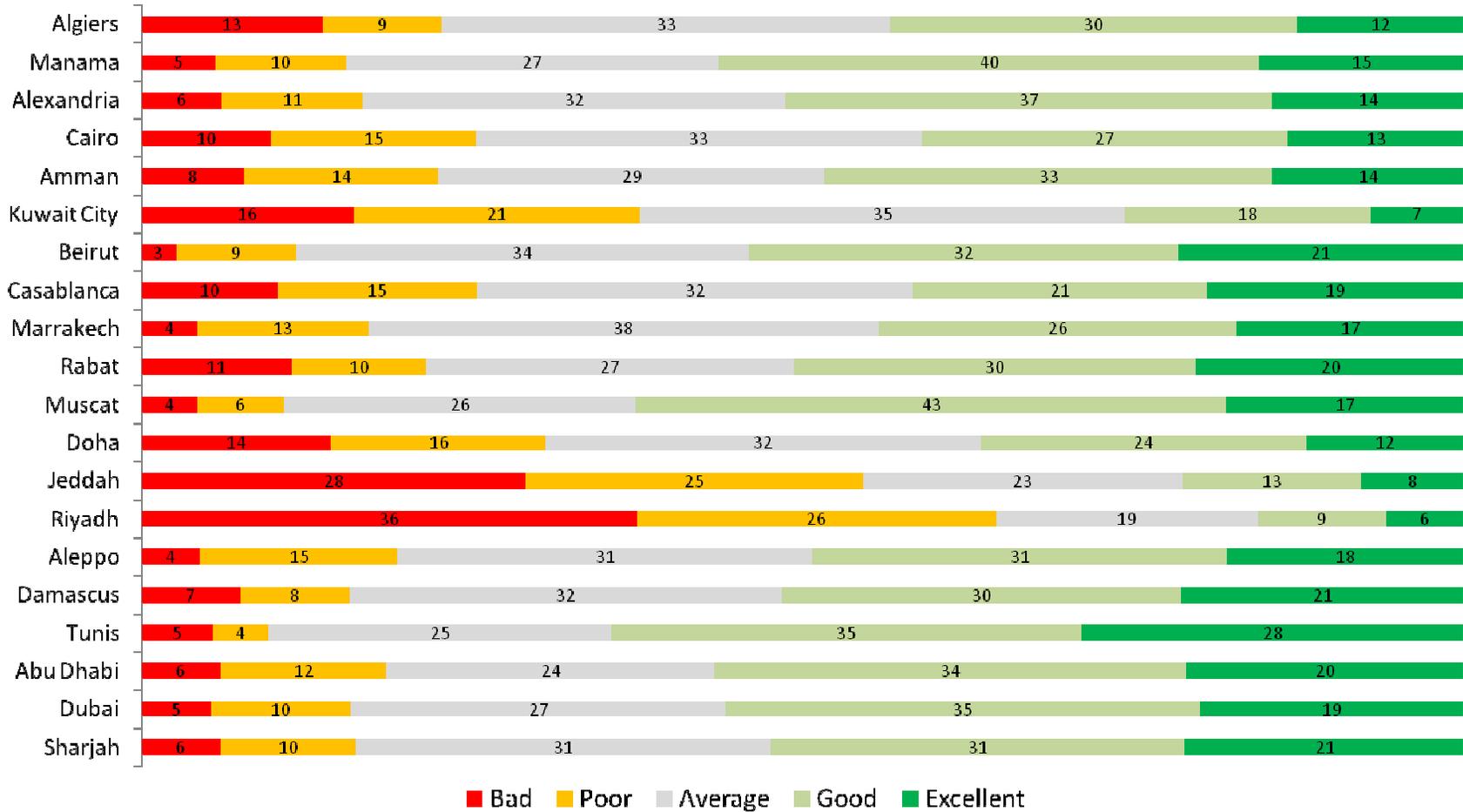
## Summary

- The majority of the cities in the region have received an above the average rating on ‘equality among genders’ and ‘fair treatment to all nationalities’.
- The impact of the Arab Spring and other civic unrest can be seen on the non-GCC cities with residents giving either an average or below the average rating on ‘Stability of Political environment’.
- GCC residents feel their cities are excellent in terms of ‘effective law enforcement’; this is probably one of the reasons for high positive ratings on ‘lower crime rates’.
- In general people in the region feel that their cities are tolerant towards people of different cultures.

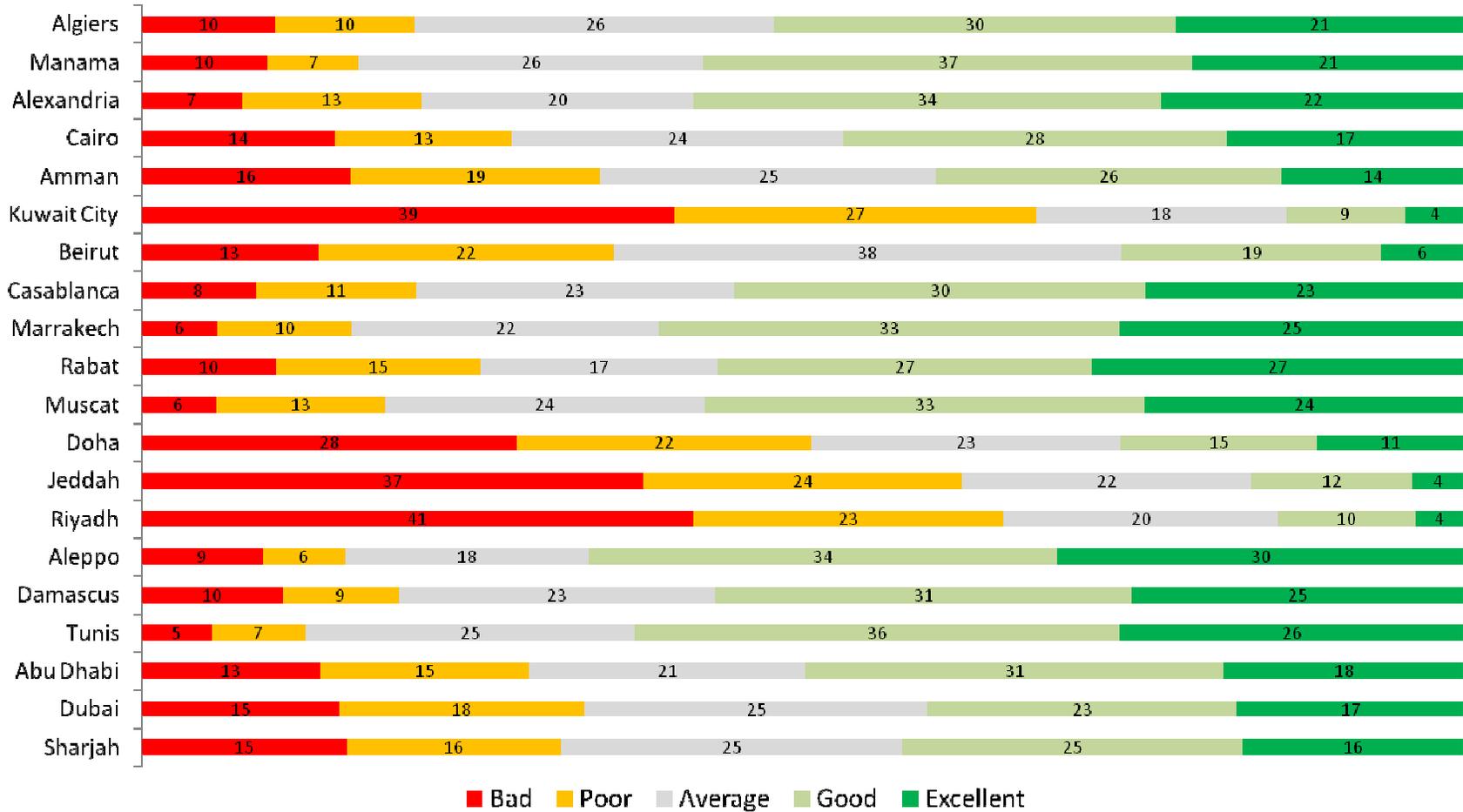
## Top Performers

- Cities that were rated highly by the residents on 'Socio-Cultural Factors' are:
  - Abu Dhabi
  - Sharjah
  - Dubai
  - Muscat
  - Doha

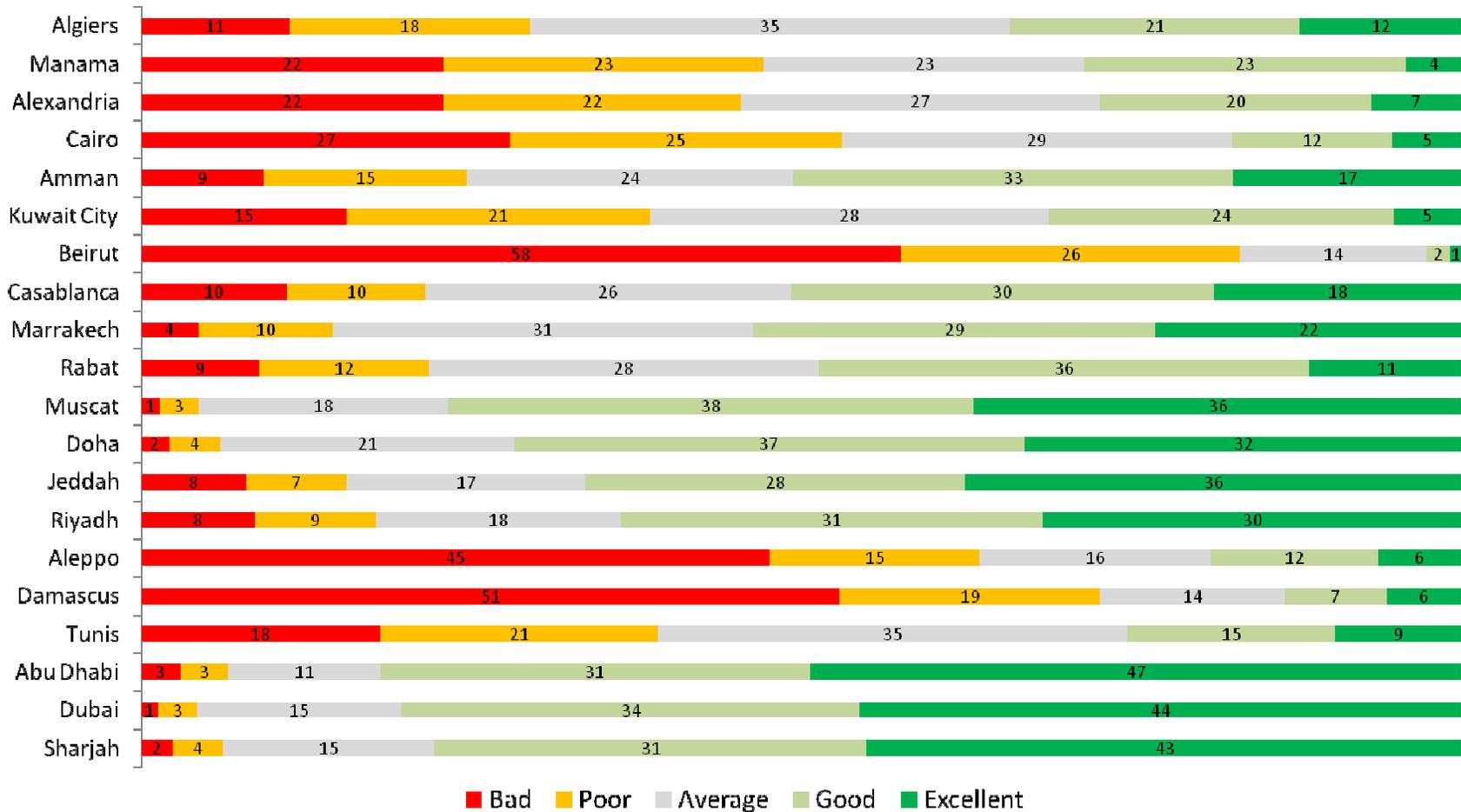
# Equality amongst both genders



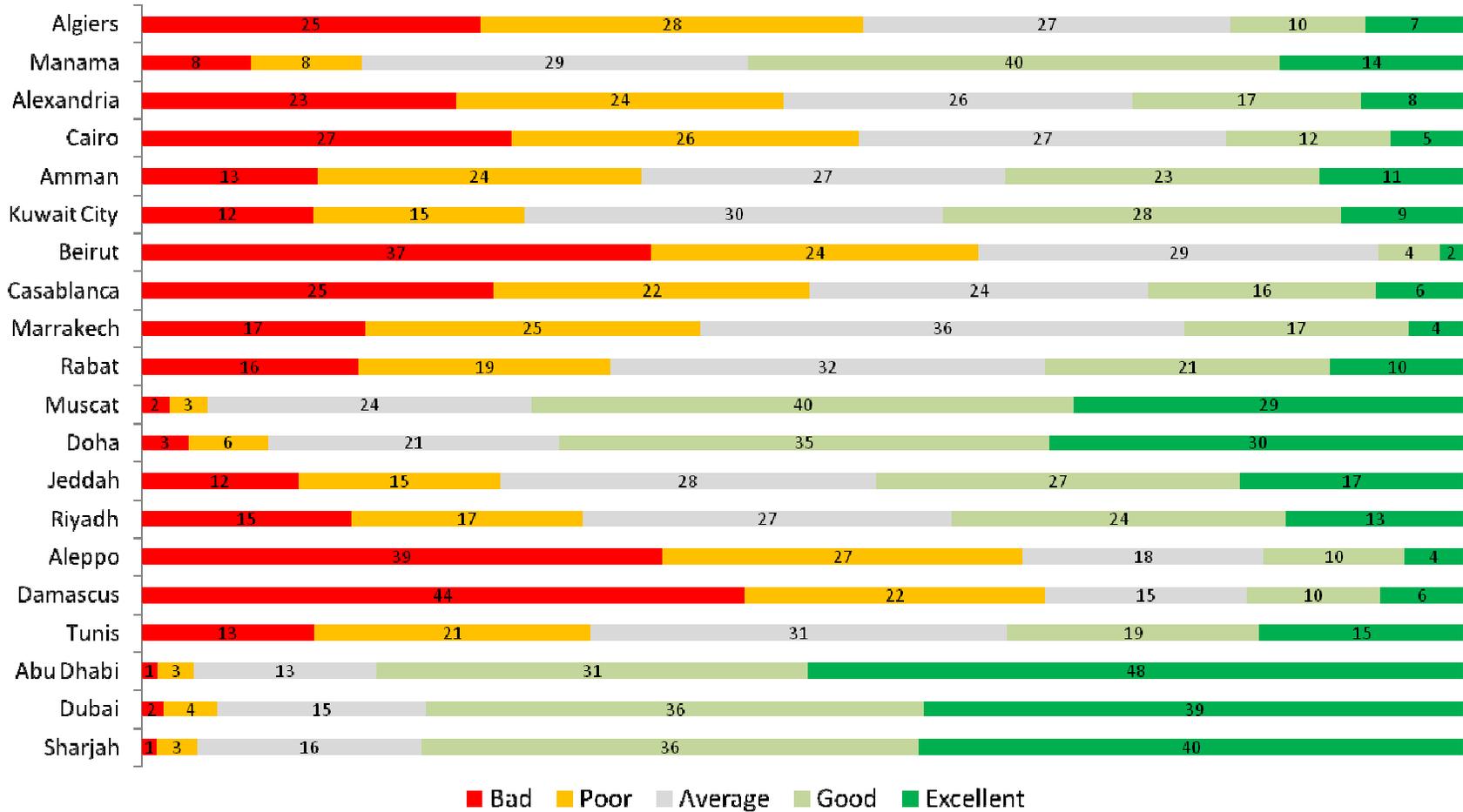
# Fair treatment to all nationalities



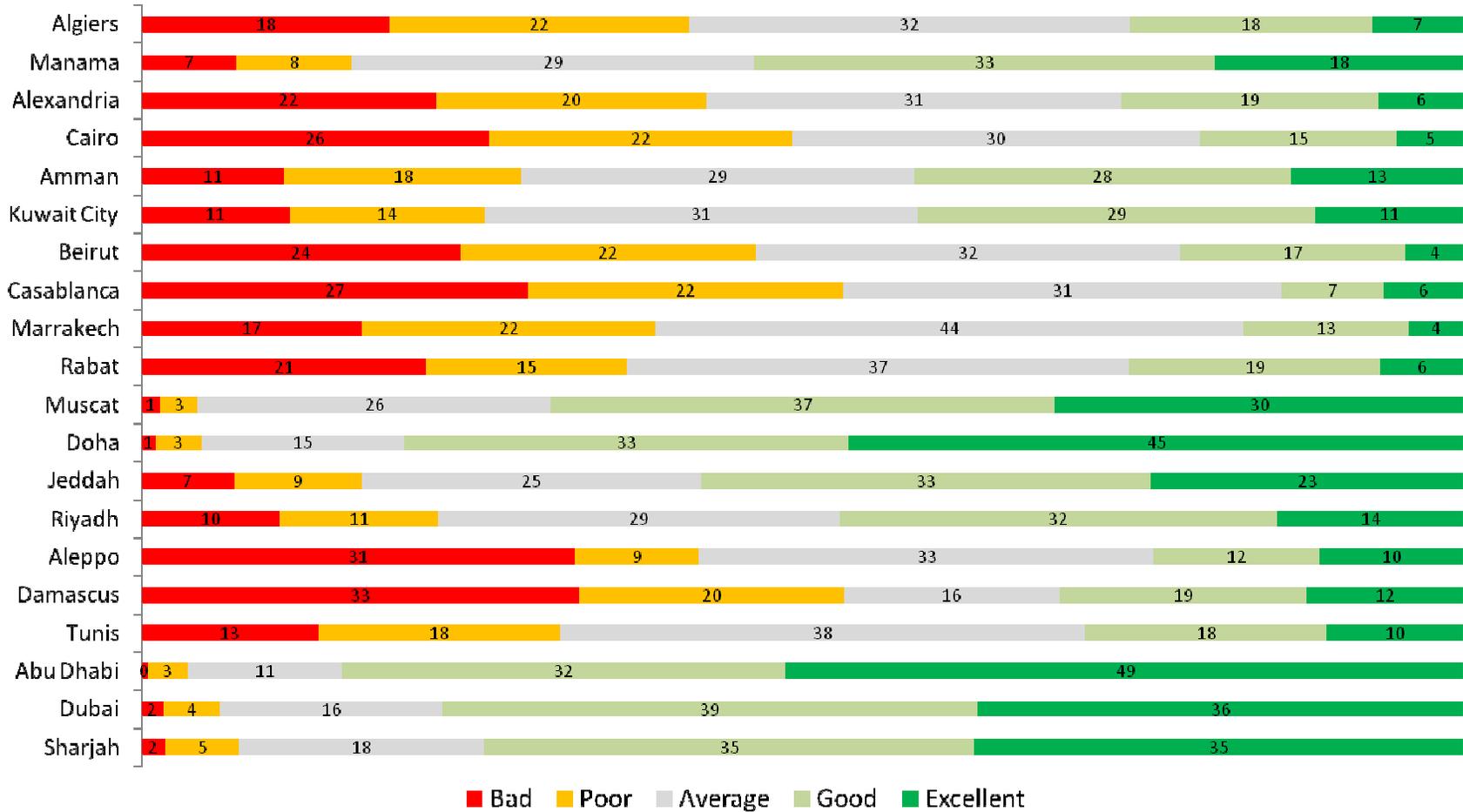
# Stable political environment



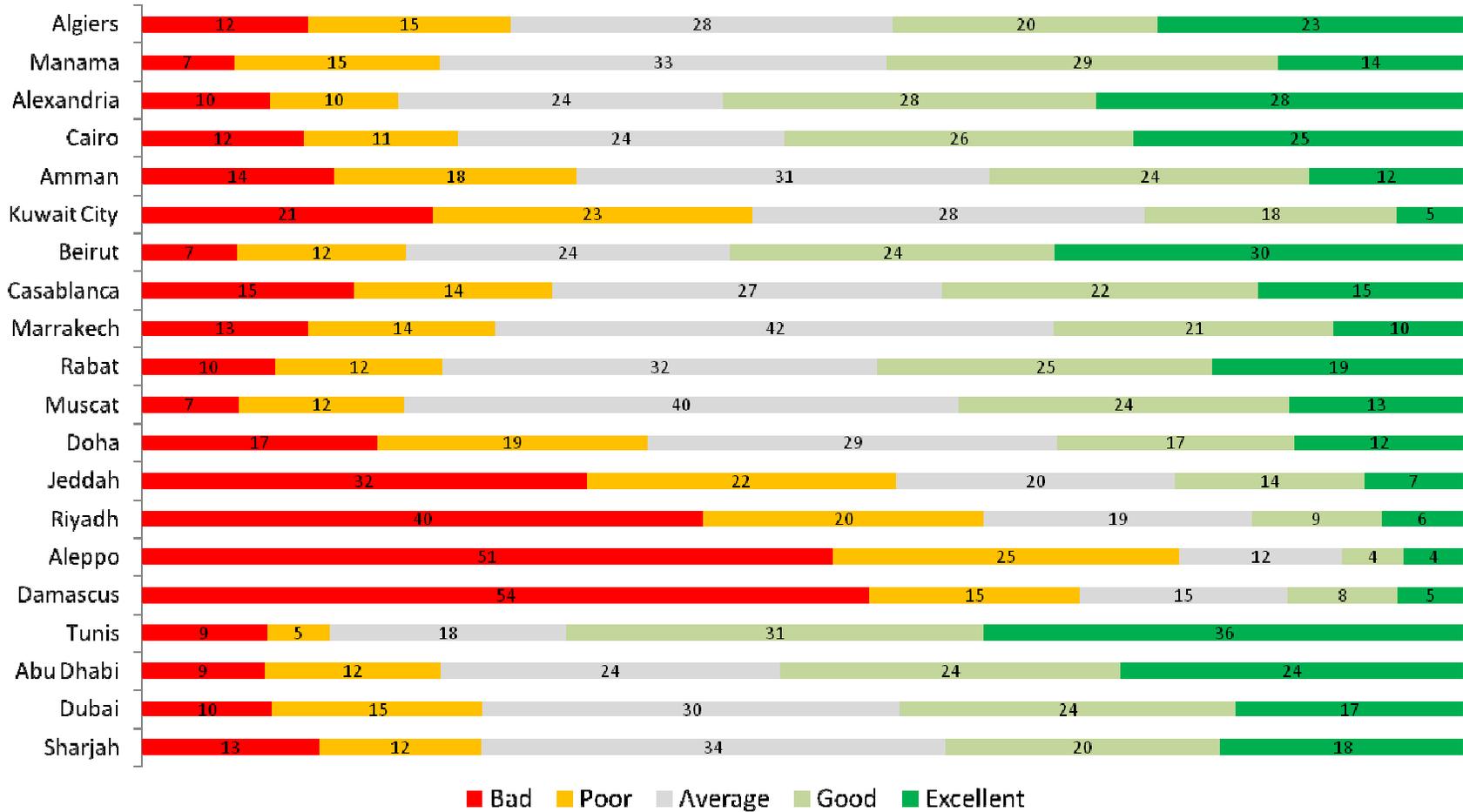
# Effective law enforcement



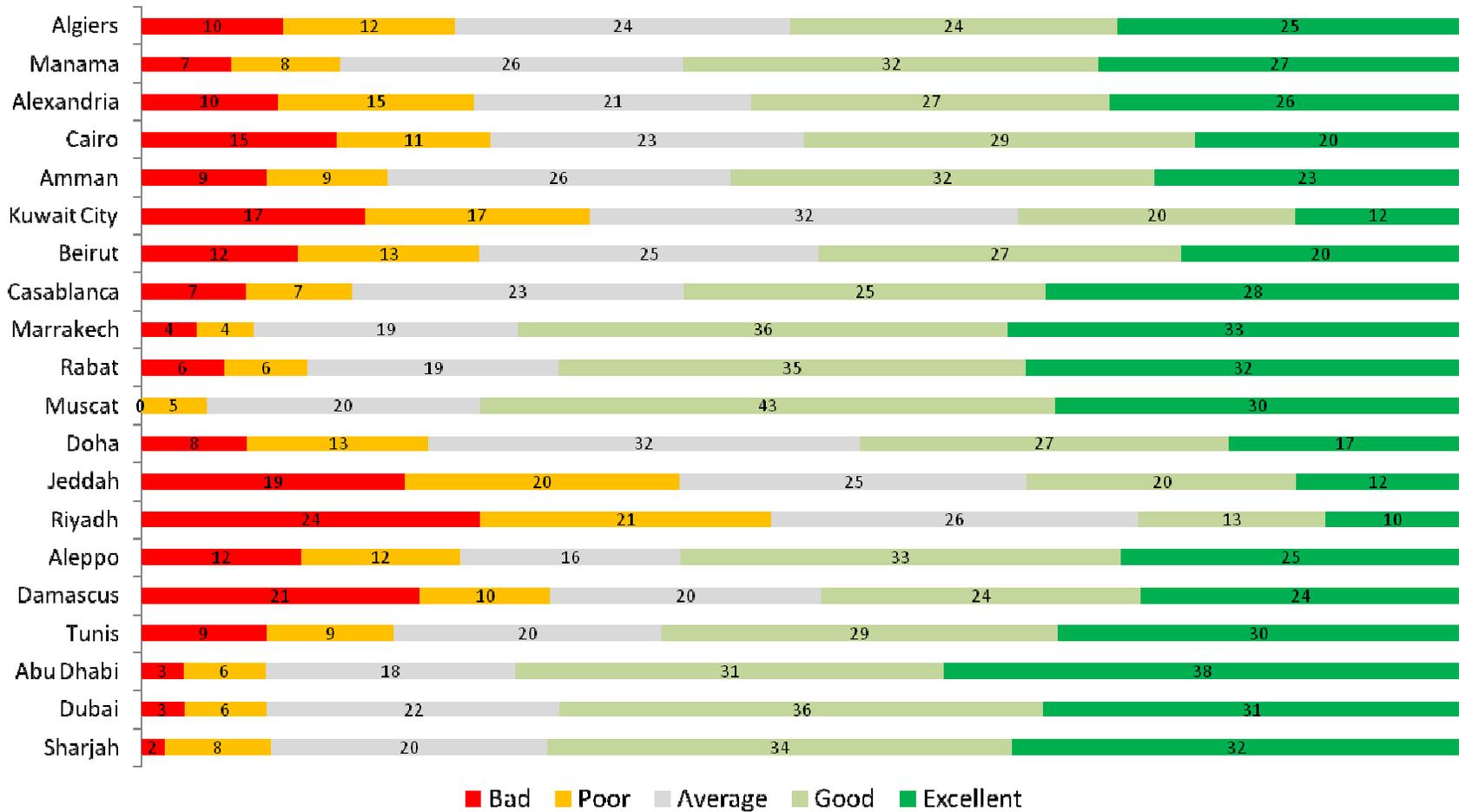
# Low crime rates



# Freedom of expression



# Tolerance to different cultures



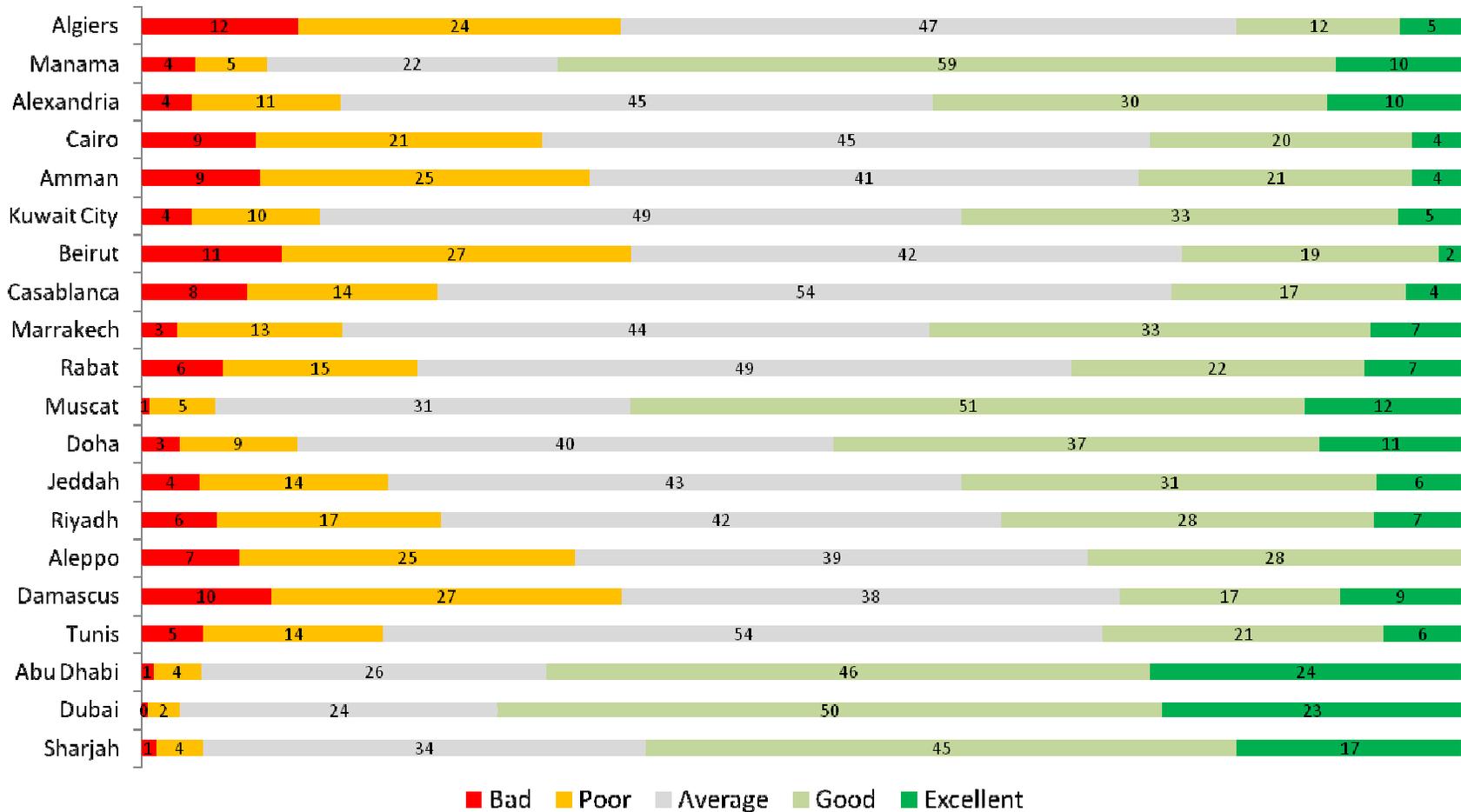


Section 7

Quality of life  
& Option to move to another city

# Overall Quality Of Life

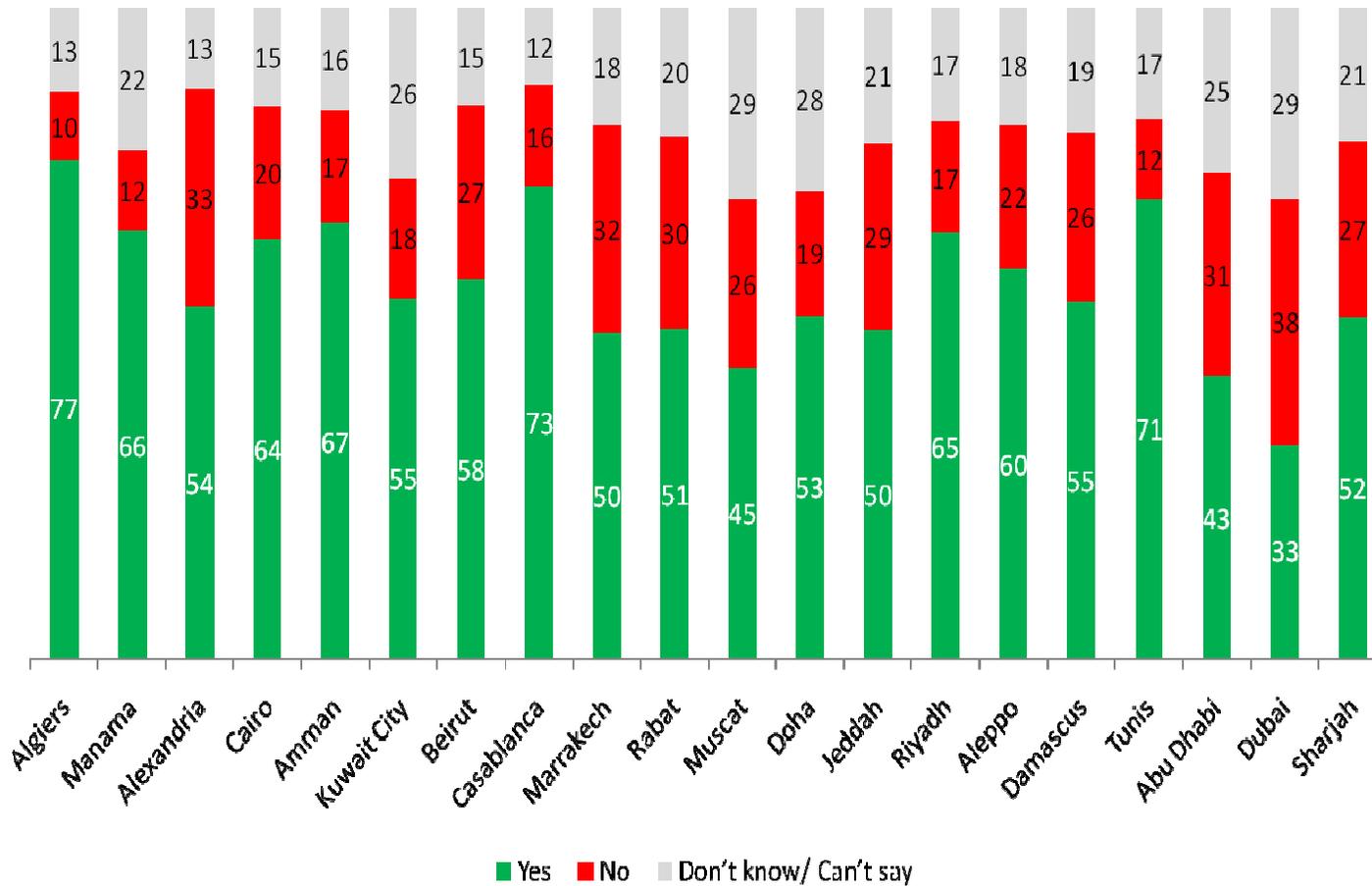
- Abu Dhabi and Dubai take the top spots as residents of these cities consider their 'Quality of Life' to be above average.



Q. Taking into consideration all the factors that you have just rated, please rate the city you live in on 'OVERALL QUALITY OF LIFE'.

## Relocation 1/2

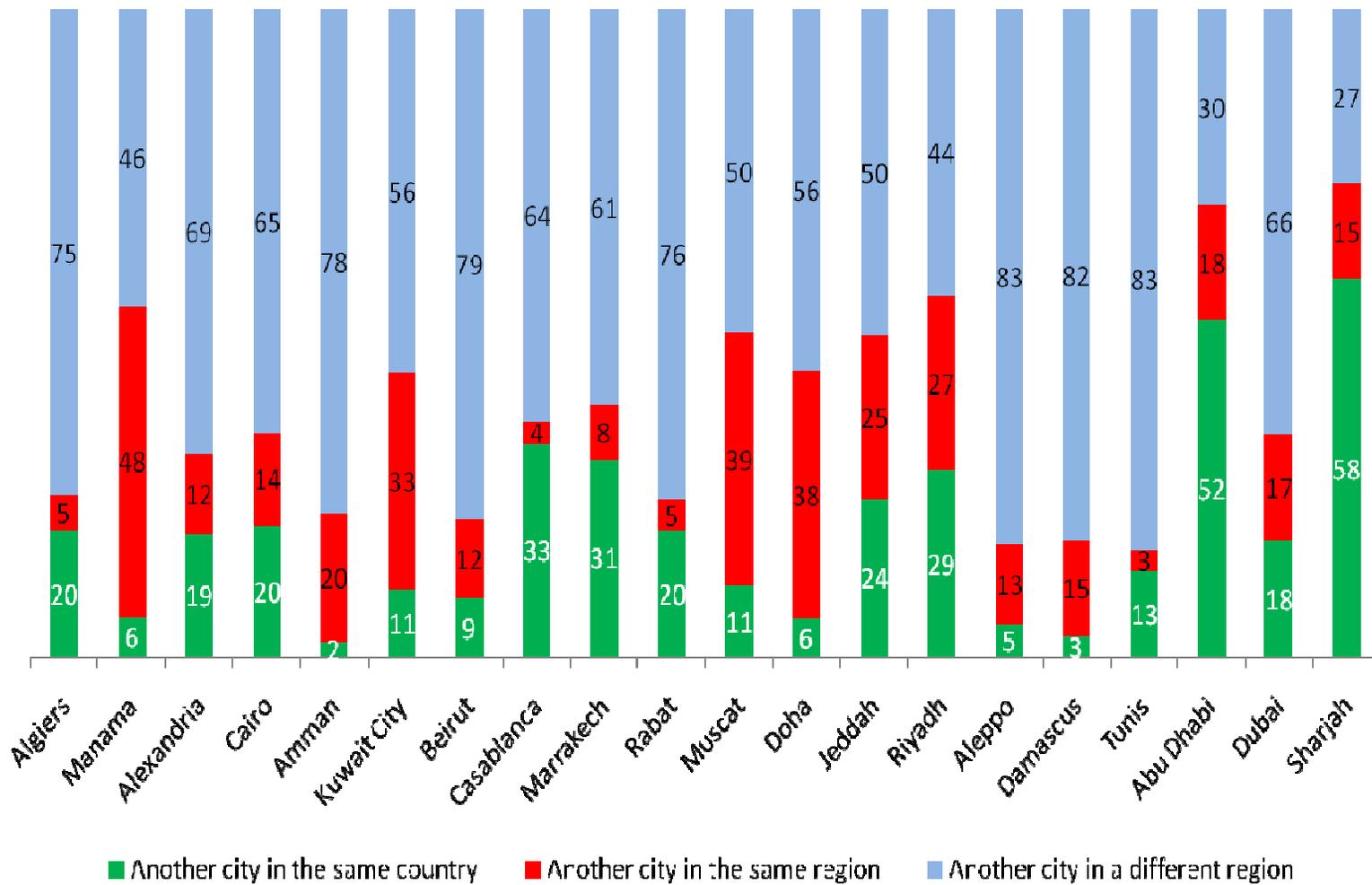
- Over half of the respondents surveyed would like to move to another city if given an option..



Q. Given an option, would you choose to move to another city to live in?

## Relocation 2/2

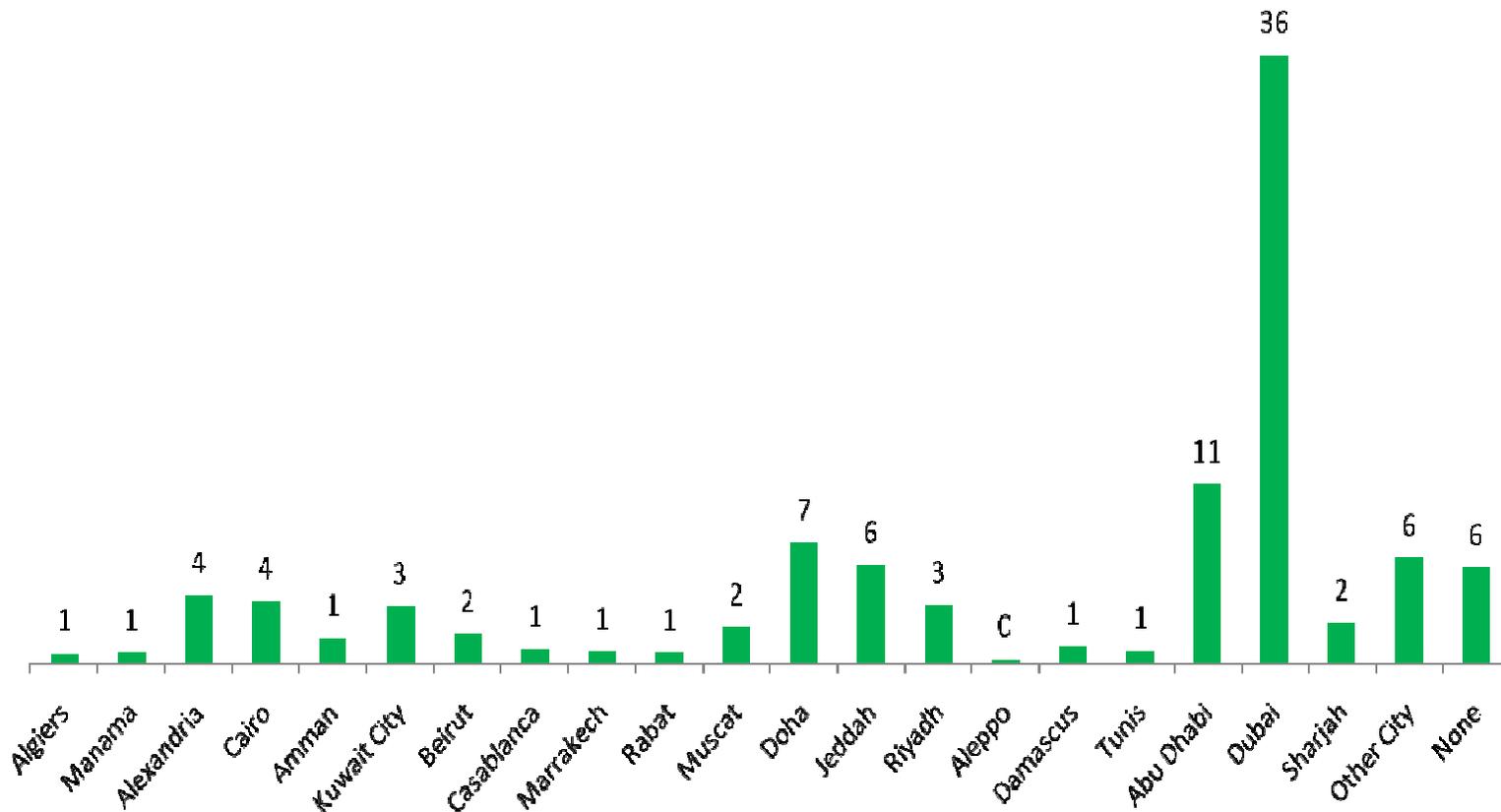
- 60% of those would like to relocate would want to move to another city in a different region.



Q. Given an option, would you choose to move to another city to live in?

## Perceived Best City

- According to 36% of the respondents surveyed 'Dubai' is the best city to live in.
- Followed by Abu Dhabi, which is selected by 11%.



Q. Finally, according to you (taking into account all factors) which city in the Middle East & North African region (MENA) is the best city to live in?



Section 8

Overall top **5**

## Overall TOP 5

Based on the ratings provided by the residents of MENA region, the top 5 cities are:



 **Thank you**

