

The Bayt.com Middle East and North Africa Salary Survey 2013

May 2013



Objective

- The research was conducted to gauge employee satisfaction of their current salaries and factors affecting thereof. The key objectives were as follows:
- Understanding overall satisfaction levels with current salary
- Level of raise received in the past year and satisfaction with the same
- Raise expected in the coming year
- Factors affecting the increase/ decrease in salary levels in country of residence
- Drivers of loyalty towards current employer

Section 1

RESEARCH METHODOLOGY

Sample definition

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

Data Collection

All data was collected online. Fieldwork was done between 28th April to 5th May 2013. The total number of respondents achieved was 15,247.

* Note: Lower sample in Syria

Section 2

RESEARCH FINDINGS

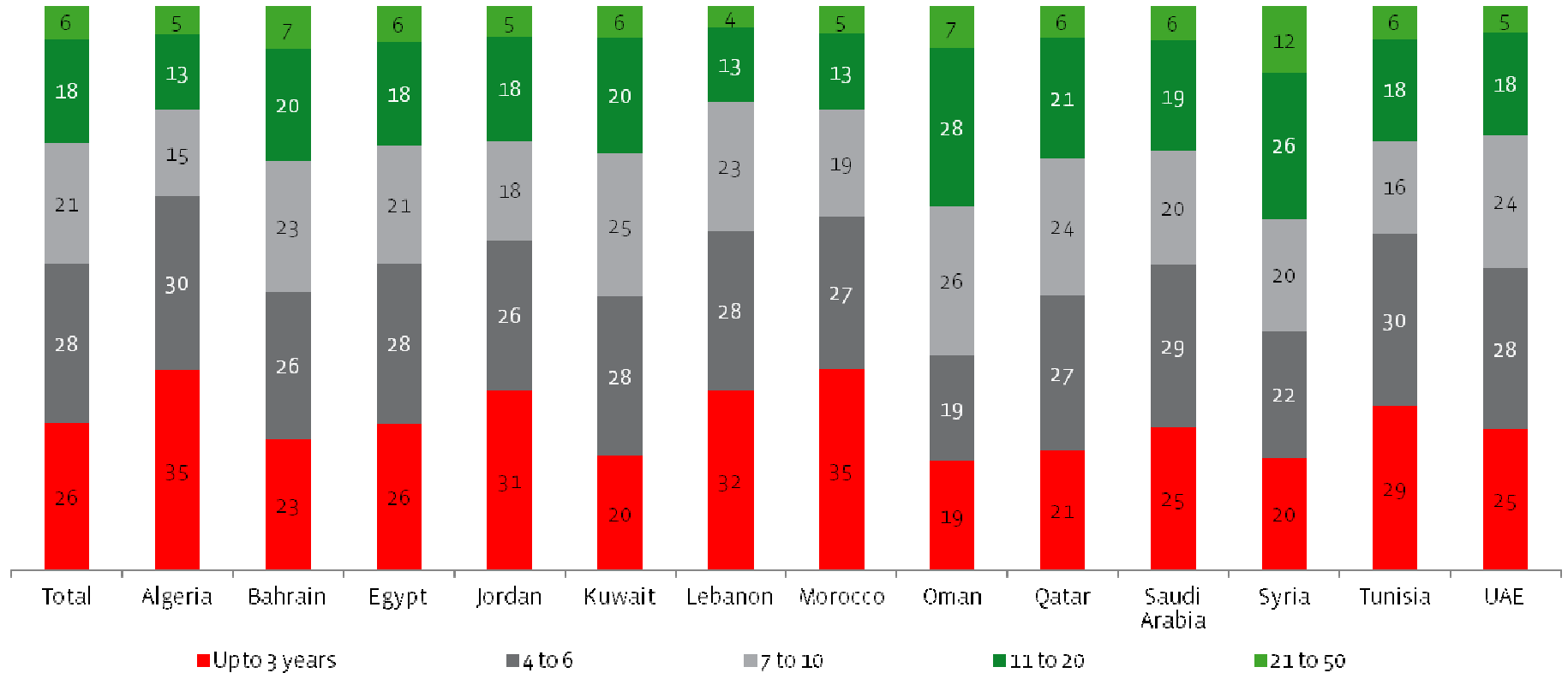
Section 2a

CURRENT JOB

Summary

- A quarter of the respondents claim they have only spent up to 3 years in their current career path; another 28% say 4 to 6 years. Algeria (35%), Morocco (35%), Lebanon (32%), and Jordan (31%) have the higher proportion of those who are new in their career path.
- One in four claim they are still new to their current job as they have spent less than a year at it. Another 26% say they have been working for 1-2 years with the current employer.
- Not surprisingly, 24% claim they do not have other people reporting to them. 21% are of the opinion that they are still early in their career.
- On average most of the respondents have held 2 jobs over the last 5 years.
- 53% prefer to have a '100% fixed pay structure'. Respondents from GCC have a higher preference for fixed structure whereas those from North Africa are divided over fixed pay and partially fixed pay structure.
- Performance based incentives and training and development courses are two most sought out benefits that respondents would like to see in their package apart from their salary.

Number of years of service in the present career path

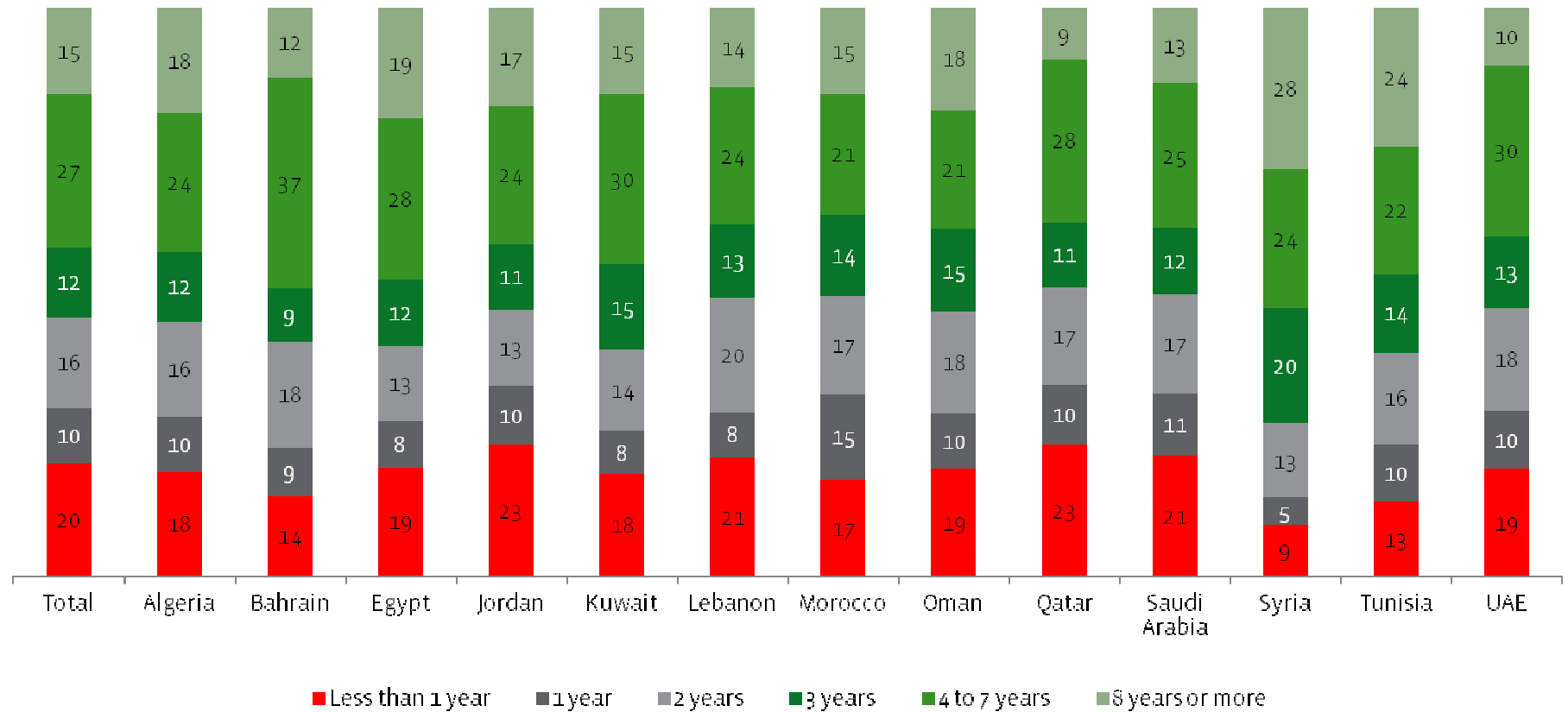


Base: Total (15,247), Algeria (621), Bahrain (174), Egypt (3979), Jordan (836), Kuwait (635), Lebanon (389), Morocco (399), Oman (274), Qatar (776), KSA (3487), Syria (85), Tunisia (243), UAE (3349)

Q. What is the total number of years in which you have been working in your current career path?

All figures are %'s

Number of years working with the current employer

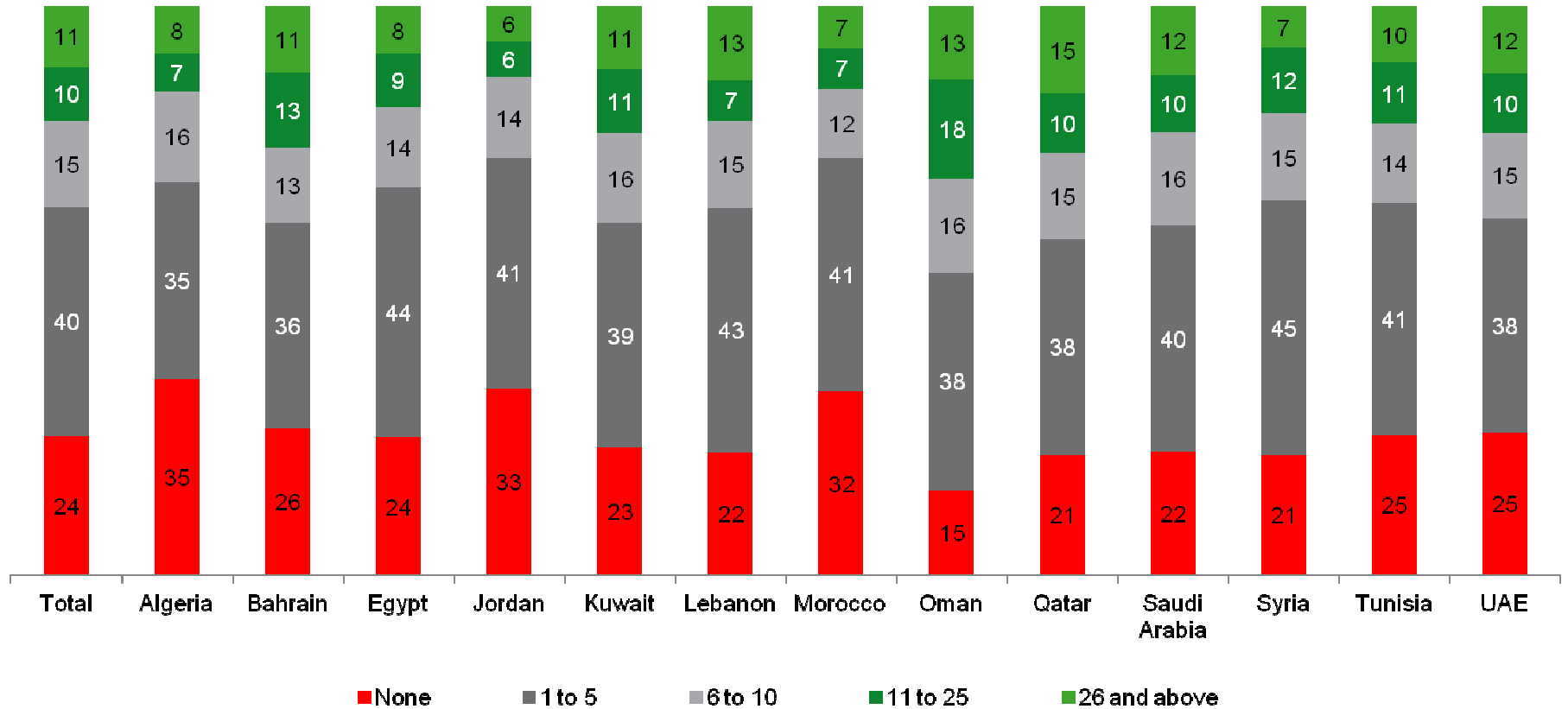


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Q. What is the total duration that you have been working with your current employer?

All figures are %'s

Number of people reporting

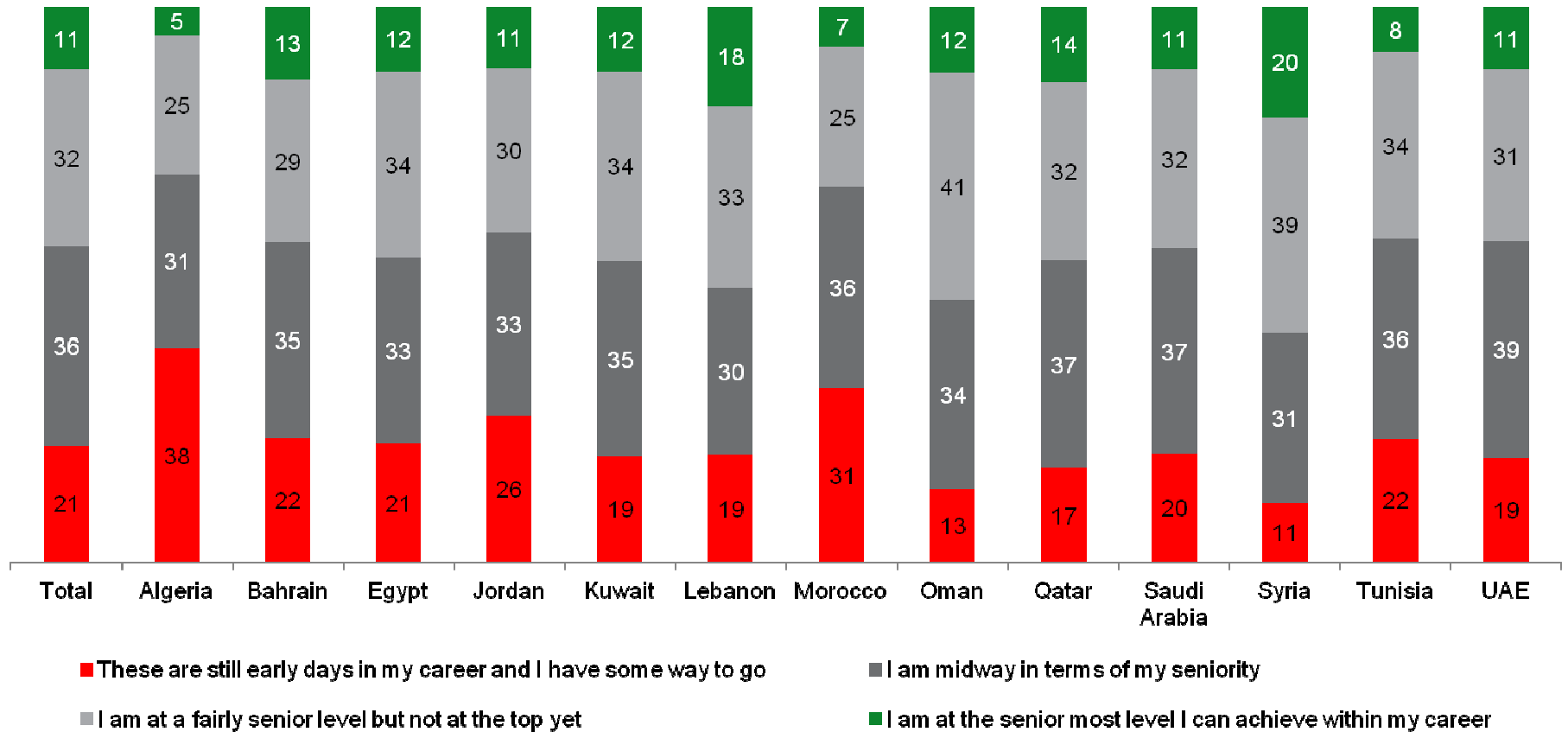


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Q. Can you tell us how many people currently report to you both directly and indirectly?

All figures are %'s

Position in career path

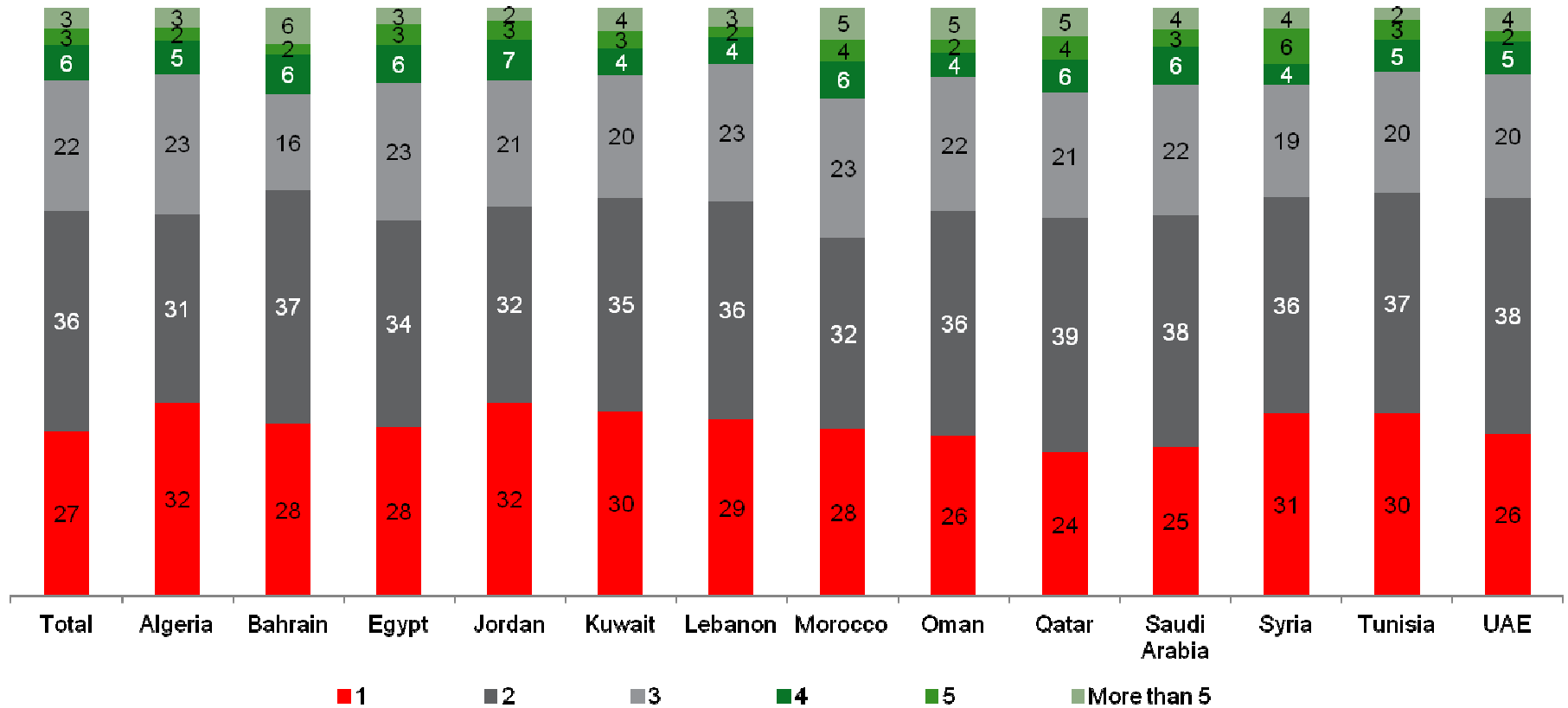


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Q. Which of the following best describes the level that you have attained so far within your career path?

All figures are %'s

Number of jobs held

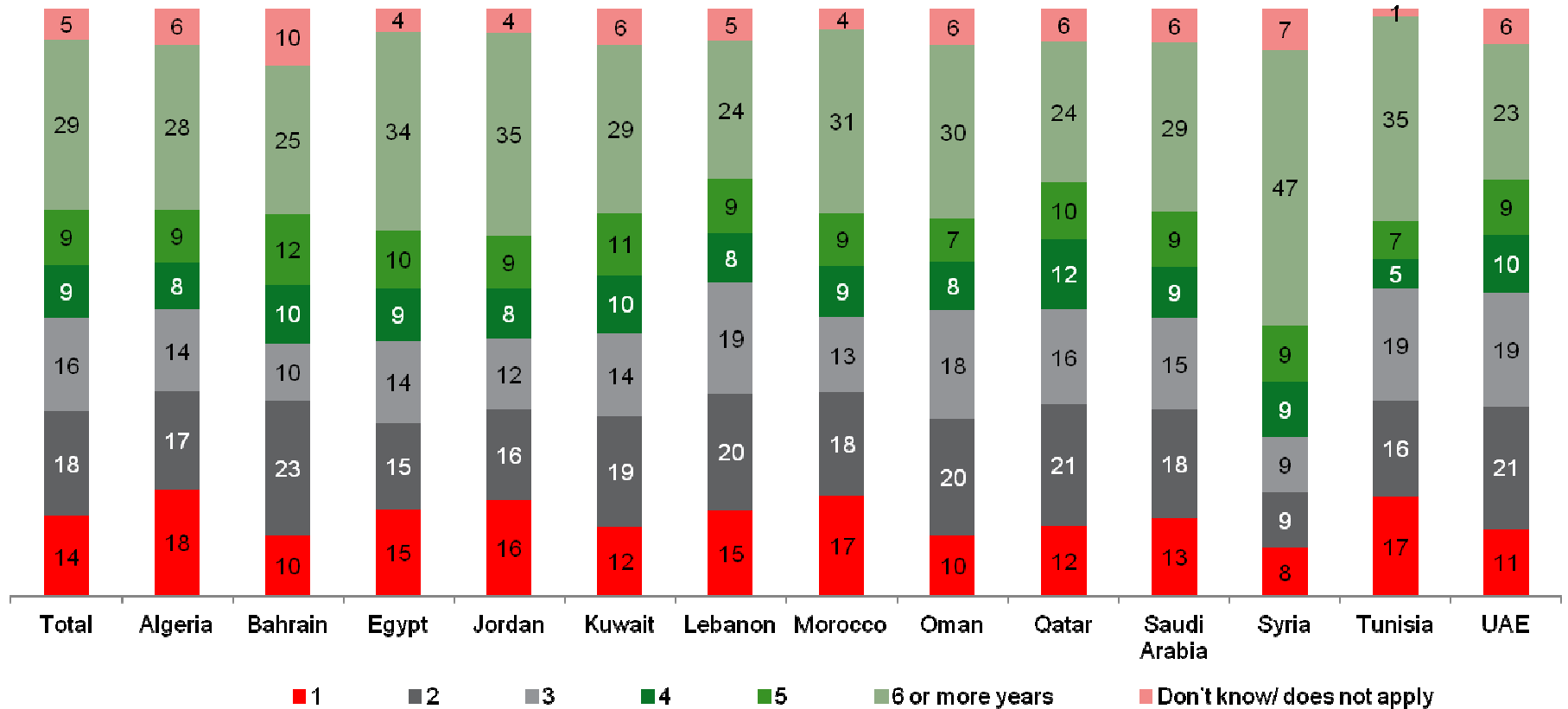


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Q. How many jobs have you held over the past 5 years?

All figures are %'s

Average length of jobs held

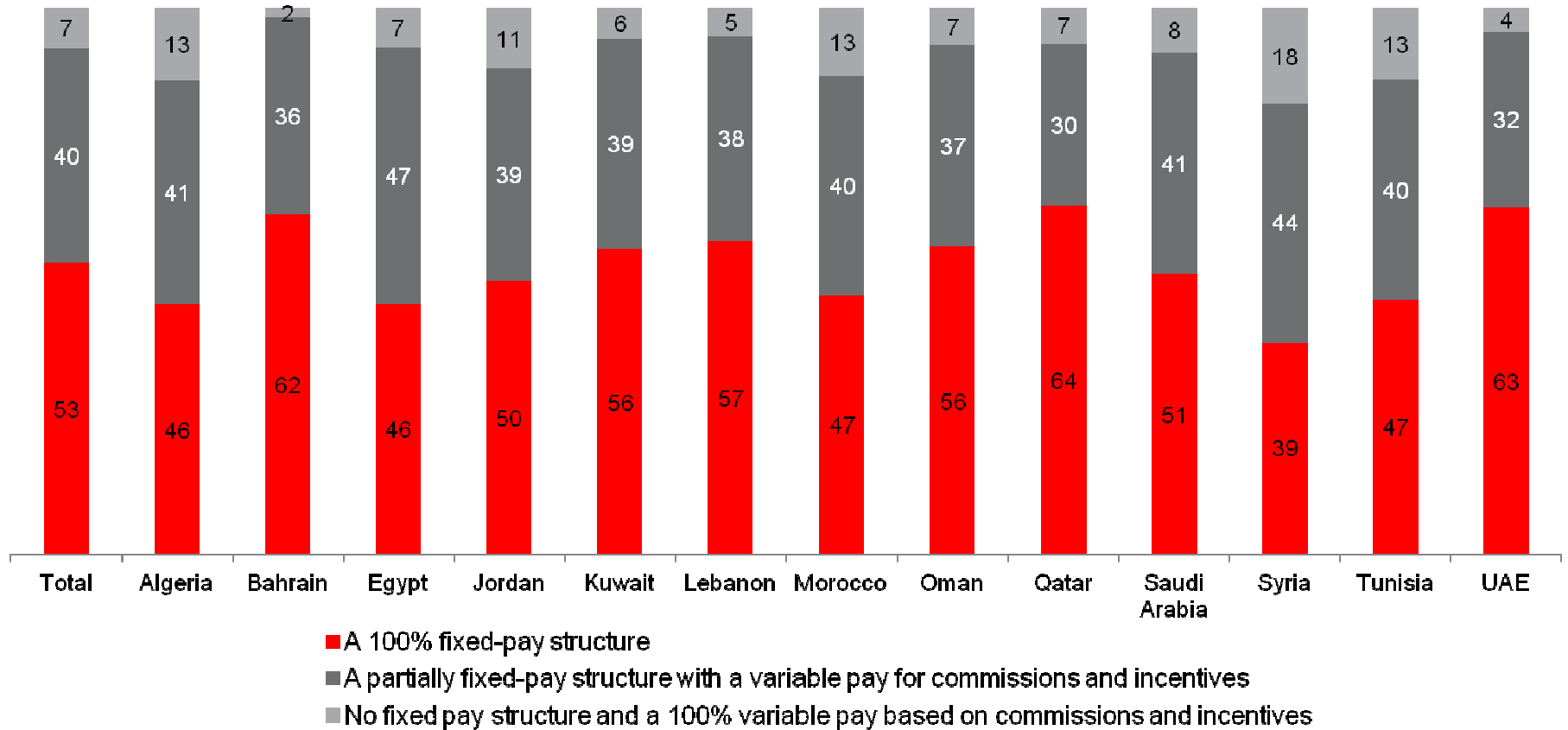


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Q. What is the average length of time that you have held a job for (in years)?

All figures are %'s

Preferred pay structure

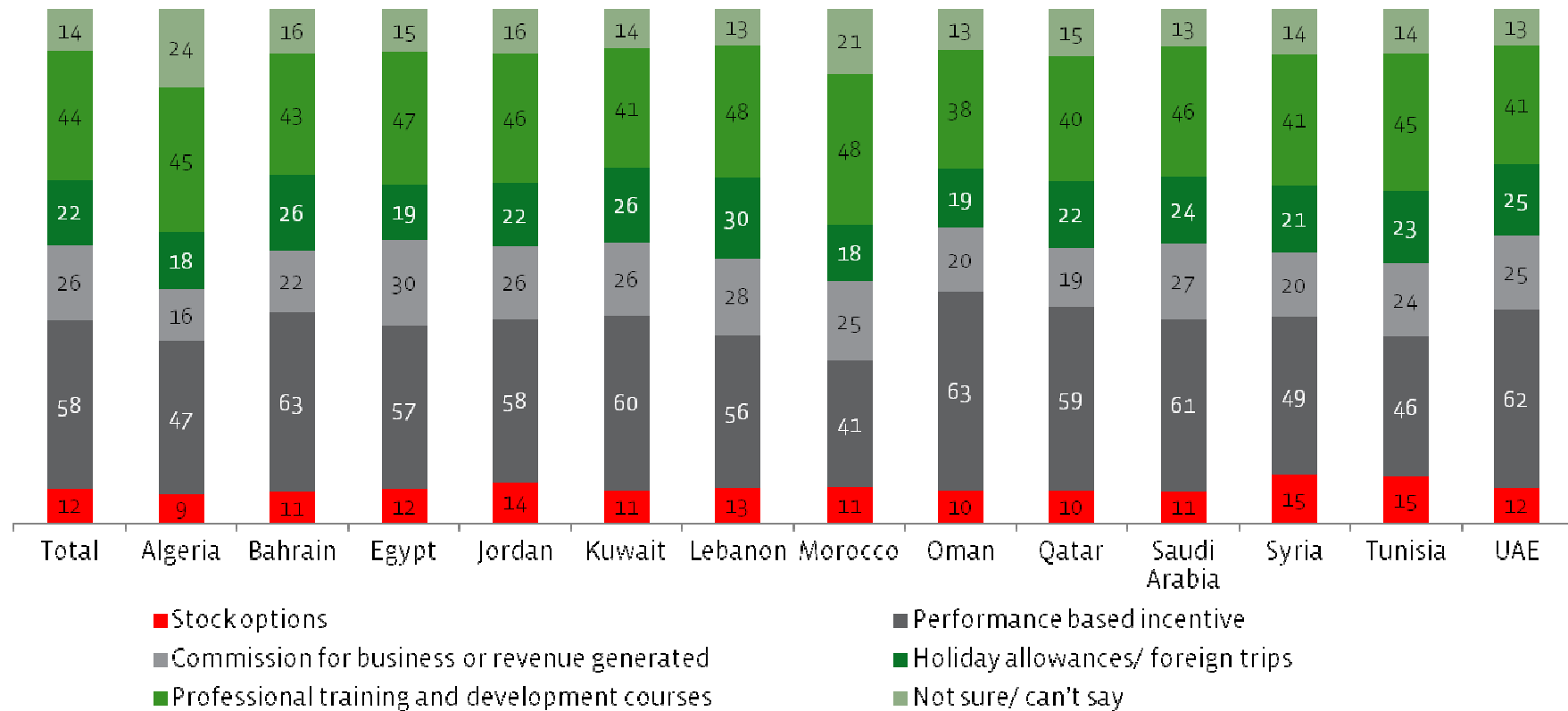


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Q. Which of the following do you think is a better pay structure for you?

All figures are %'s

Additional incentives



Base: Total (15,247), Algeria (621), Bahrain (174), Egypt (3979), Jordan (836), Kuwait (635), Lebanon (389), Morocco (399), Oman (274), Qatar (776), KSA (3487), Syria (85), Tunisia (243), UAE (3349)

Q. Which of the following do you think would be attractive incentives for you to be included in your compensation package in lieu of a proportion of your salary?

All figures are %'s

Additional incentives

	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
Base	15247	621	174	3979	836	635	389	399	274	776	3487	85	243	3349
Performance based incentive	58	47	63	57	58	60	56	41	63	59	61	49	46	62
Professional training and development courses	44	45	43	47	46	41	48	48	38	40	46	41	45	41
Commission for business or revenue generated	26	16	22	30	26	26	28	25	20	19	27	20	24	25
Holiday allowances/ foreign trips	22	18	26	19	22	26	30	18	19	22	24	21	23	25
Stock options	12	9	11	12	14	11	13	11	10	10	11	15	15	12
Not sure/ can't say	14	24	16	15	16	14	13	21	13	15	13	14	14	13

Base: Total (15,247), Algeria (621), Bahrain (174), Egypt (3979), Jordan (836), Kuwait (635), Lebanon (389), Morocco (399), Oman (274), Qatar (776), KSA (3487), Syria (85), Tunisia (243), UAE (3349)

Q. Which of the following do you think would be attractive incentives for you to be included in your compensation package in lieu of a proportion of your salary?

All figures are %'s

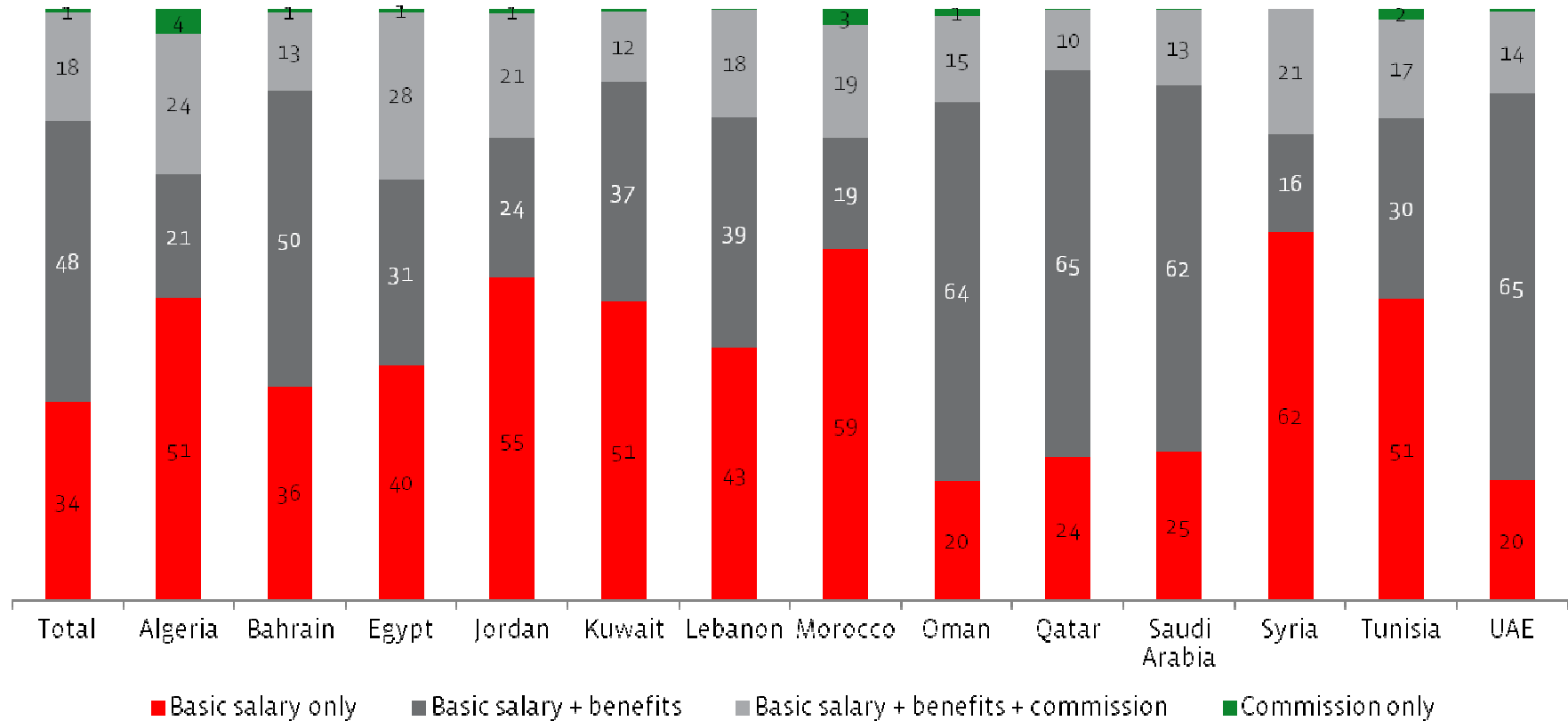
Section 2b

CURRENT PACKAGE

Summary

- Over half of the respondents from North Africa claim their current package only consists of Basic salary. On the other hand those from GCC say their package comprises of basic salary+ some additional benefits.
- Majority of the respondents express moderate to low satisfaction with the current salary they receive.
- Apart from basic salary, personal medical insurance, bonus and transport allowance are the top 3 additional benefits that respondents claim to receive.

Composition of current package

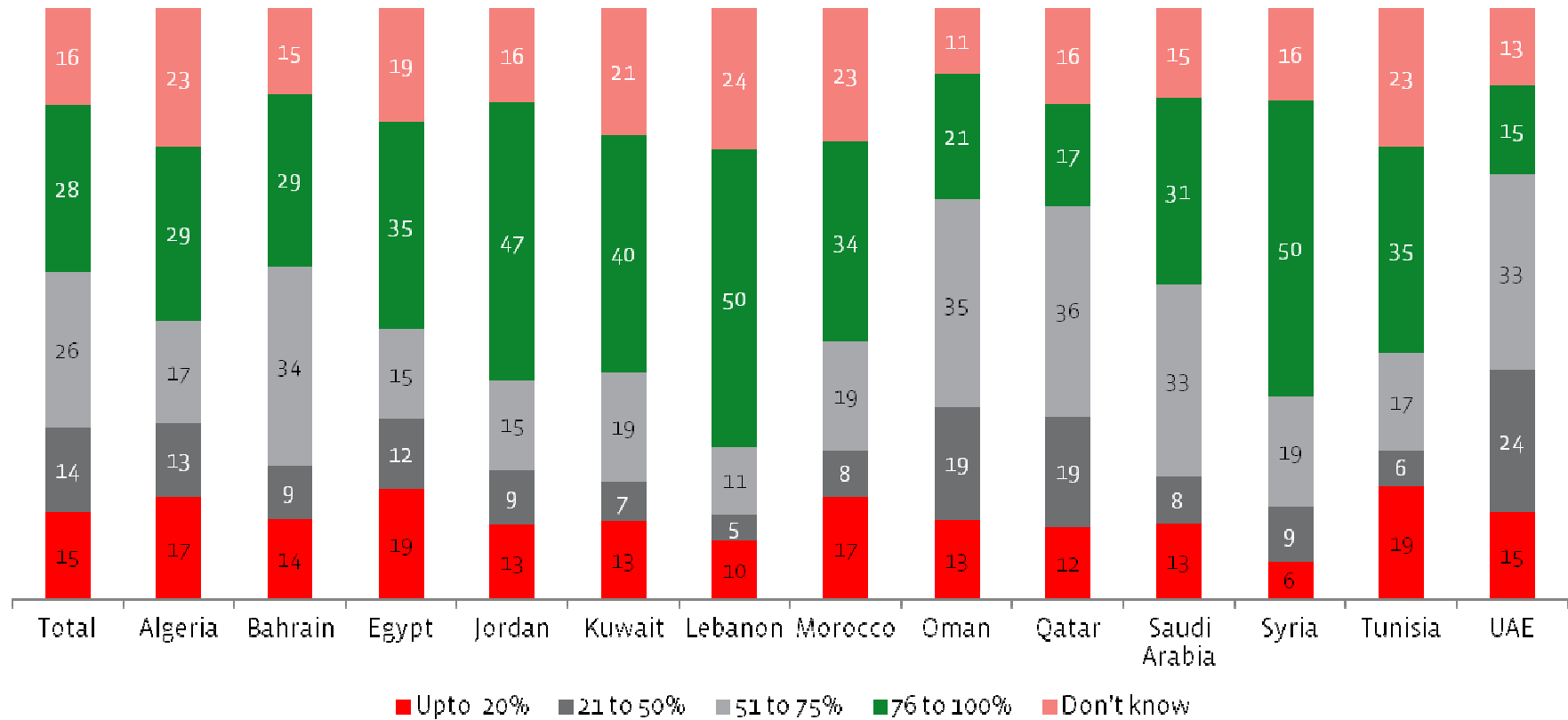


Base: Total (15,247), Algeria (621), Bahrain (174), Egypt (3979), Jordan (836), Kuwait (635), Lebanon (389), Morocco (399), Oman (274), Qatar (776), KSA (3487), Syria (85), Tunisia (243), UAE (3349)

Q. The current salary you get includes:

All figures are %'s

Proportion of basic salary

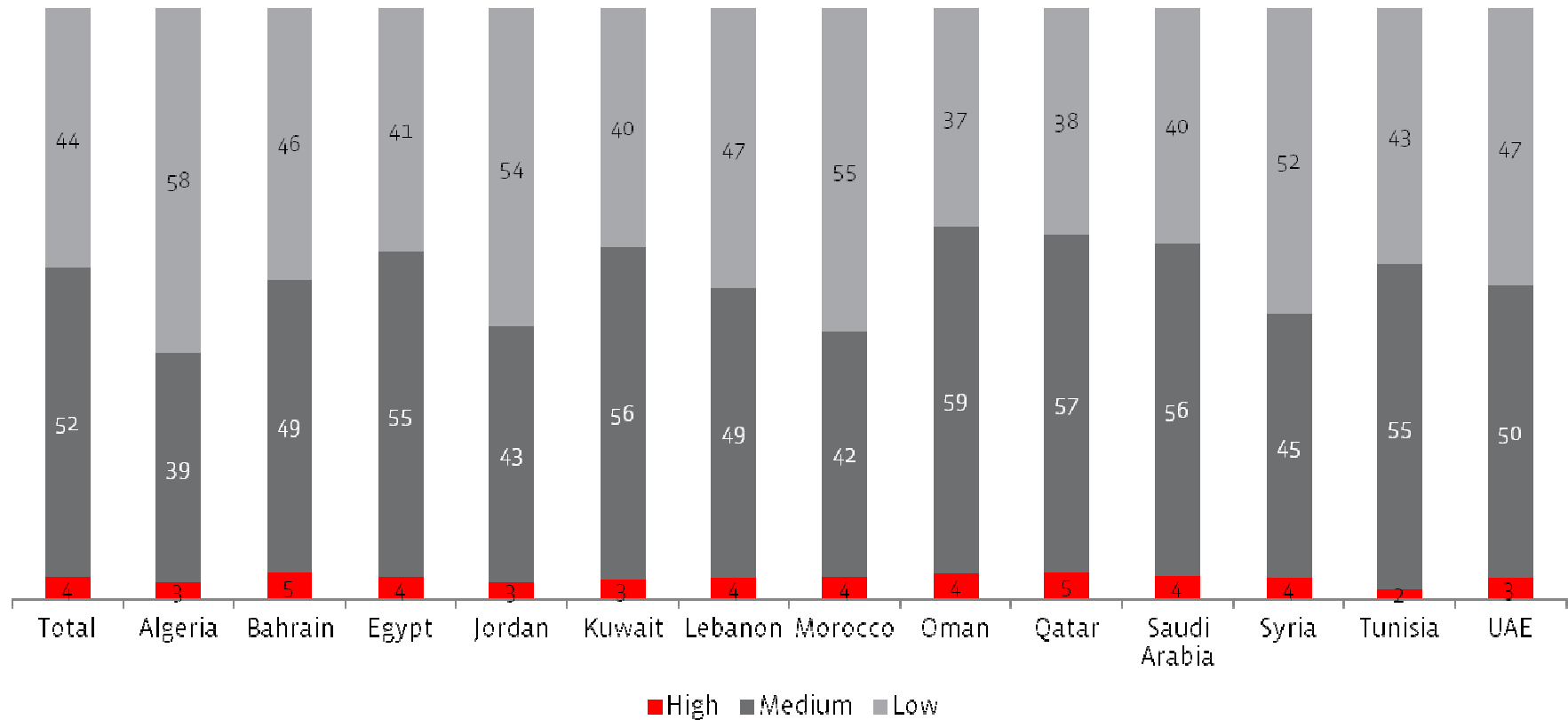


Base: Those who receive salary + Benefits/ commission (10,038), Algeria (278), Bahrain (110), Egypt (2376), Jordan (374), Kuwait (312), Lebanon (222), Morocco (151), Oman (216), Qatar (587), KSA (2605), Syria (32), Tunisia (115), UAE (2660)

Q. What percentage of the total salary package that you receive is your basic MONTHLY salary?

All figures are %'s

Satisfaction with income



Base: Total (15,247), Algeria (621), Bahrain (174), Egypt (3979), Jordan (836), Kuwait (635), Lebanon (389), Morocco (399), Oman (274), Qatar (776), KSA (3487), Syria (85), Tunisia (243), UAE (3349)

Q. Please indicate your level of satisfaction with your current salary.

All figures are %'s

Additional benefits 1/2

	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
Base	15247	621	174	3979	836	635	389	399	274	776	3487	85	243	3349
Personal medical insurance	48	48	35	45	45	32	35	49	50	39	60	39	39	50
Bonus	32	28	32	36	25	30	39	18	43	33	31	33	22	32
Transport allowance	30	24	25	25	20	20	46	23	30	38	39	21	20	30
Personal annual air ticket	27	5	30	4	1	24	4	4	41	50	46	5	3	46
Housing allowance	25	6	28	7	3	16	3	7	31	40	49	5	9	32
Family medical insurance	23	23	22	13	25	13	14	25	31	16	39	13	28	23
Company-provided mobile	18	11	17	17	16	17	10	21	30	20	21	15	16	15
Company-provided car / transport	16	11	21	13	7	15	8	13	31	24	21	13	13	16

Q. Apart from your salary which of the following are included in the compensation / benefits you receive from your current company. (Please select all that apply)

Base: Total (16379)

All figures are %'s

Additional benefits 2/2

	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
Base	15247	621	174	3979	836	635	389	399	274	776	3487	85	243	3349
Company-provided accommodation	16	12	18	9	4	17	4	8	35	29	23	5	8	19
Telecom bills paid by company / allowance	14	8	16	16	10	15	12	13	24	18	14	7	14	13
Gratuity	14	4	12	4	2	10	3	4	33	30	9	6	5	33
Family annual air tickets	12	2	15	2	1	9	2	2	23	18	27	0	2	16
Personal training / development courses allowance	10	9	8	12	9	8	11	8	15	10	10	9	12	8
Holiday allowances / foreign trips	7	5	7	6	3	10	6	4	8	10	10	5	3	7
Children's education allowance	4	2	3	1	2	4	9	2	8	7	6	0	2	6
Stock options	1	1	0	1	1	1	2	0	1	1	1	1	2	1

Q. Apart from your salary which of the following are included in the compensation / benefits you receive from your current company. (Please select all that apply)

Base: Total (16379)

All figures are %'s

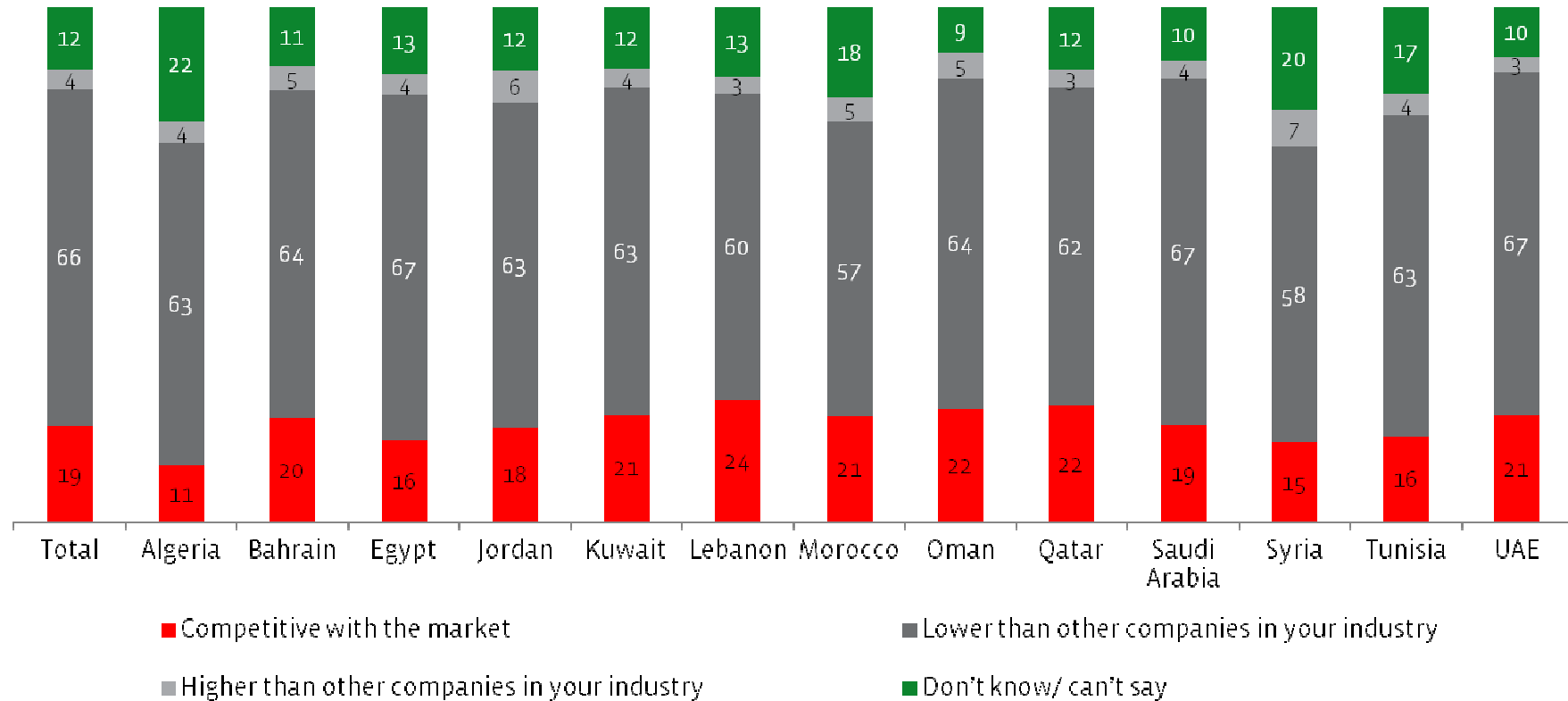
Section 2c

SALARY COMPARISONS AND EXPECTATIONS

Summary

- 66% feel that the salaries paid by their company are 'lower' than other companies in the same industry.
- 38% claim they did not receive a raise in the year 2012. Of those who received, one in five says it was between 1-5%. 31% are unhappy with the raise they have received.

Level of competitiveness of packages

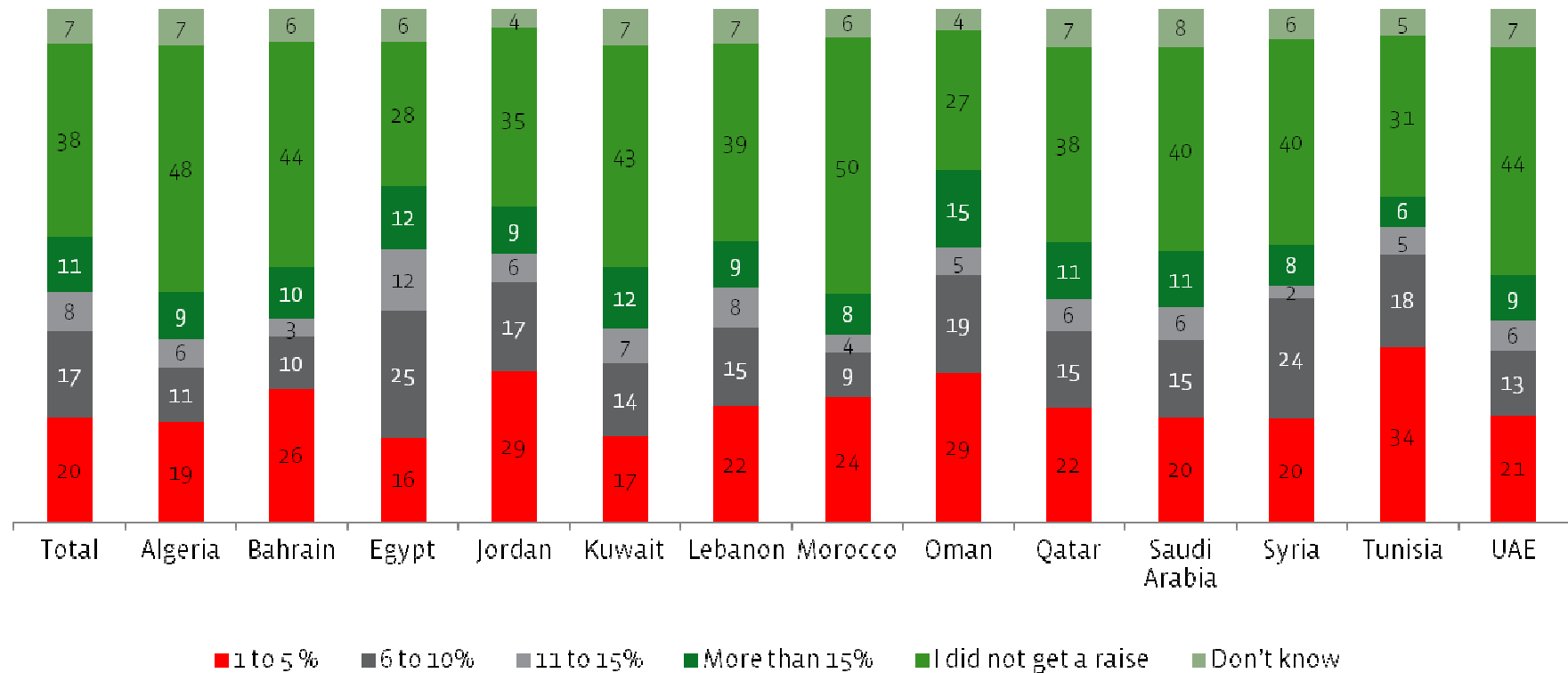


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Q. Do you feel salaries paid in your company are...

All figures are %'s

Raise received



Base: Total (15,247), Algeria (621), Bahrain (174), Egypt (3979), Jordan (836), Kuwait (635), Lebanon (389), Morocco (399), Oman (274), Qatar (776), KSA (3487), Syria (85), Tunisia (243), UAE (3349)

Q. Can you please select the total percentage raise you received in the year 2012 (January 2012 – December 2012)?

All figures are %'s

Views on raise received

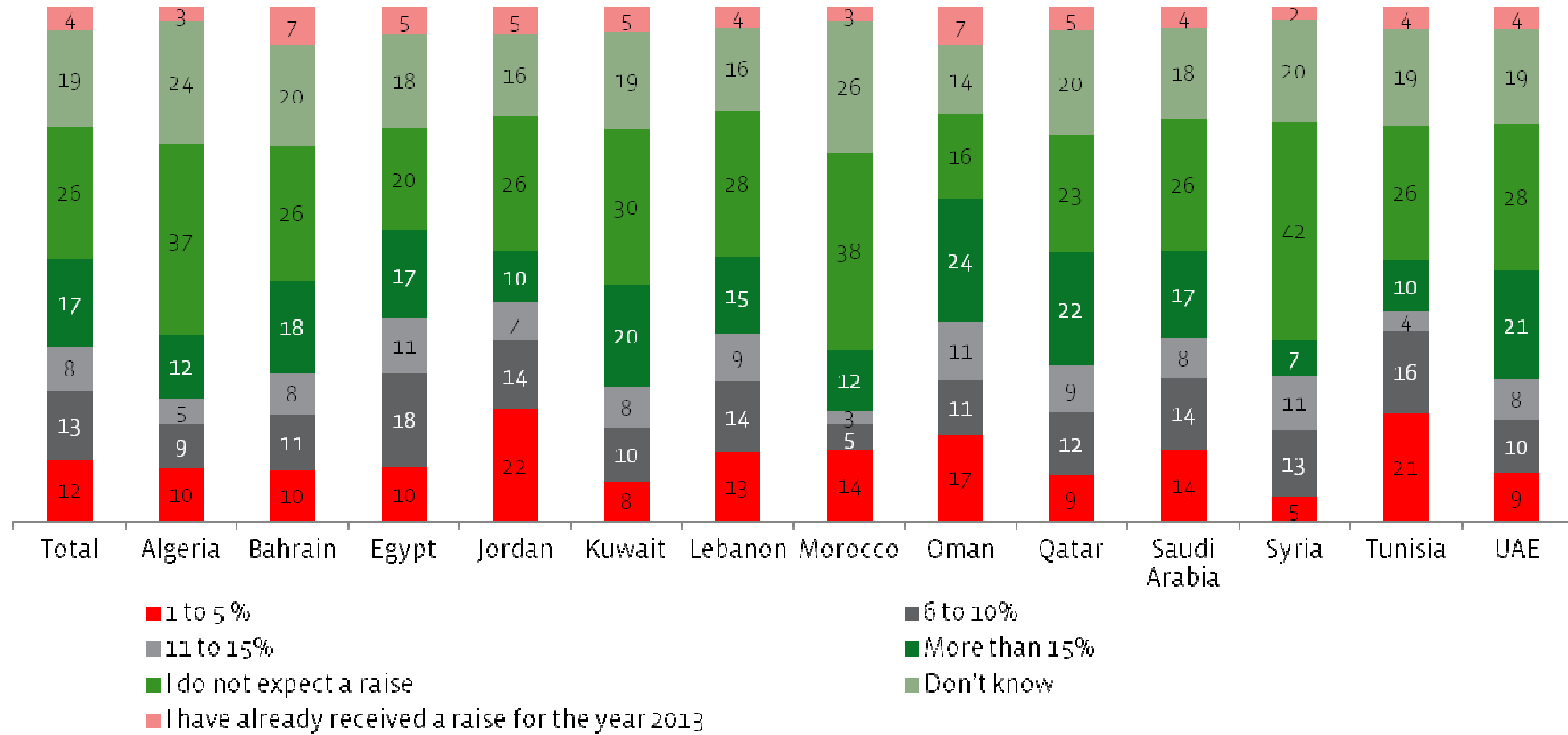
	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
Base: Received salary increase in the year 2012	8449	279	86	2602	513	315	213	177	188	424	1833	46	154	1619
I am very happy with my raise	7	5	9	5	5	10	7	6	9	12	8	4	5	8
I am modestly happy with my raise	17	17	22	16	15	19	14	12	16	17	19	17	15	17
My raise is fair in light of my contributions to the company	11	13	6	9	7	11	12	15	11	10	12	7	5	13
My raise is fair in light of the company's financial situation	9	6	6	13	7	10	11	9	7	9	7	15	10	8
My raise is fair in light of my contribution and the company's financial situation	6	9	5	7	6	5	7	9	7	5	6	7	5	6
I am unhappy with my raise	31	29	23	30	30	33	33	30	30	33	32	30	42	31
I am very unhappy with my raise	18	22	29	19	30	12	16	19	20	14	16	20	19	17

Q. Please indicate how satisfied you are with the salary raise you received in the year 2012 (January 2012 – December 2012)?

Base: Total (16379)

All figures are %'s

Raise expected



Base: Total (15,247), Algeria (621), Bahrain (174), Egypt (3979), Jordan (836), Kuwait (635), Lebanon (389), Morocco (399), Oman (274), Qatar (776), KSA (3487), Syria (85), Tunisia (243), UAE (3349)

Q. Can you please select the total percentage raise you expect to receive in the year 2013 (January 2013 - December 2013)?

All figures are %'s

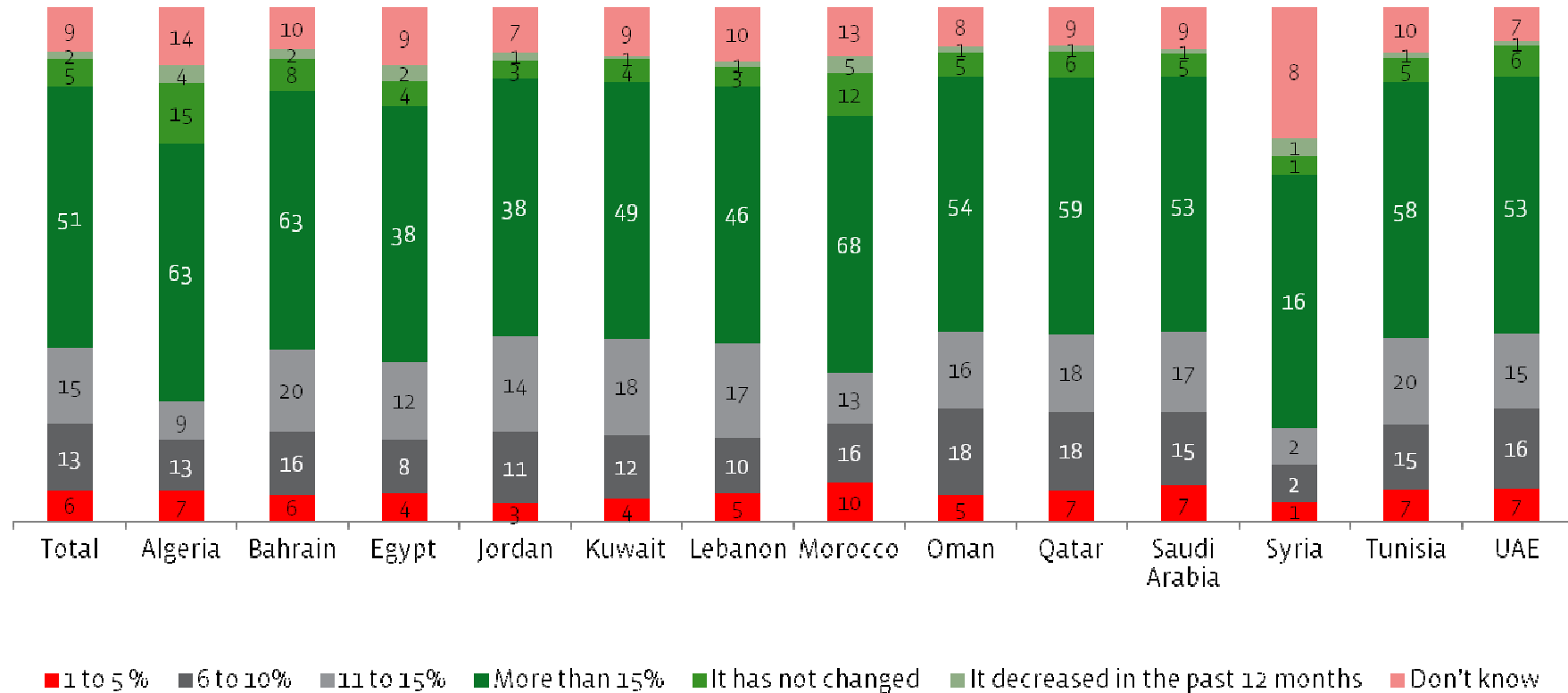
Section 2d

COST OF LIVING AND SAVINGS

Summary

- Half of the respondents claim that Cost of living has increased by more than 15% in the year 2012.
- Food and beverage (81%) and rents (67%) are the two areas that most affected the overall increase in cost of living.
- Respondents across all countries are in consensus that the cost of living would further increase in the year 2013.
- 36% say they do not save any percentage of their monthly income.

Increase in cost of living



Base: Total (15,247), Algeria (621), Bahrain (174), Egypt (3979), Jordan (836), Kuwait (635), Lebanon (389), Morocco (399), Oman (274), Qatar (776), KSA (3487), Syria (85), Tunisia (243), UAE (3349)

Q. On average, by what percentage do you think your cost of living has increased in the year 2012 (January 2012 – December 2012)?

All figures are %'s

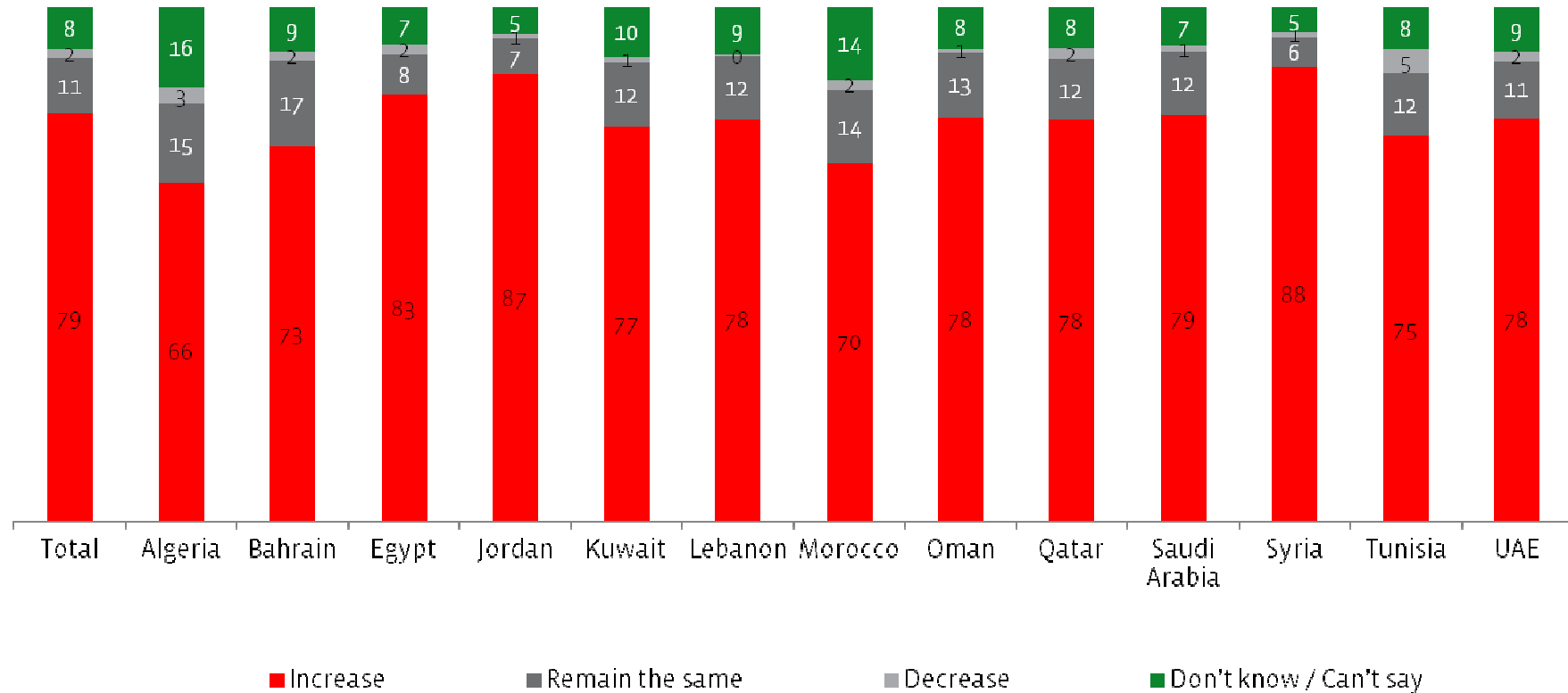
Factors affected by increased cost of living

	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
Base: Cost of living has increased in the year 2012	12877	413	138	3395	748	545	334	283	234	651	2984	76	202	2874
Food and Beverage	81	84	81	88	83	81	86	77	85	78	82	93	94	69
Rents	67	51	60	48	66	82	57	54	59	72	77	72	62	80
Entertainment	42	42	32	51	54	35	58	34	43	34	38	59	49	34
Education (school/ college)	41	14	38	44	48	39	52	32	44	39	42	42	19	38
Utilities (Water, electricity, gas etc.)	8	10	11	10	12	8	7	8	7	5	6	16	6	8
Other	54	50	25	76	86	23	56	60	46	32	36	70	83	49

Q. For which of the following elements have you seen an increase for in the year 2012 (January 2012 – December 2012)?

All figures are %'s

Expectation of future cost of living

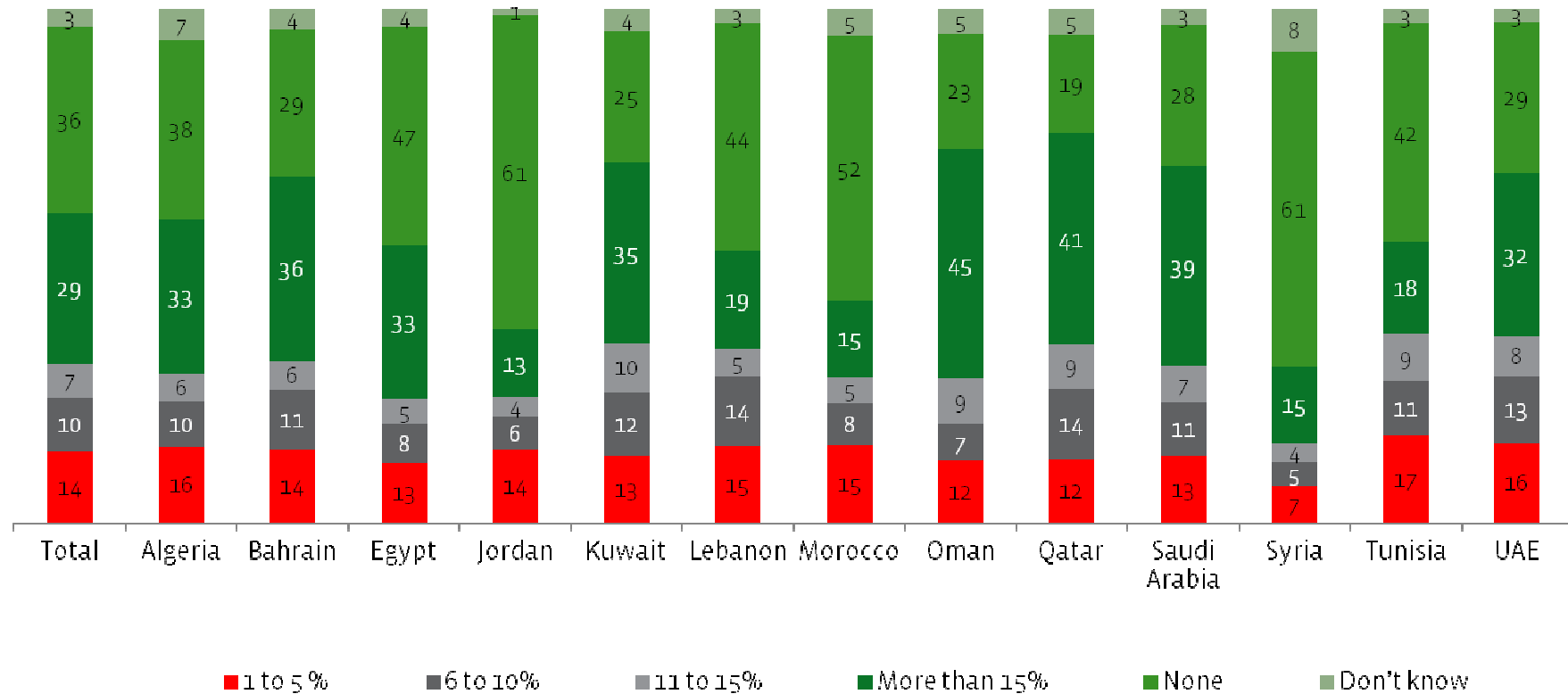


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Q. In the year 2013 (January 2013 - December 2013) you expect your cost of living to:

All figures are %'s

Proportion of salary saved

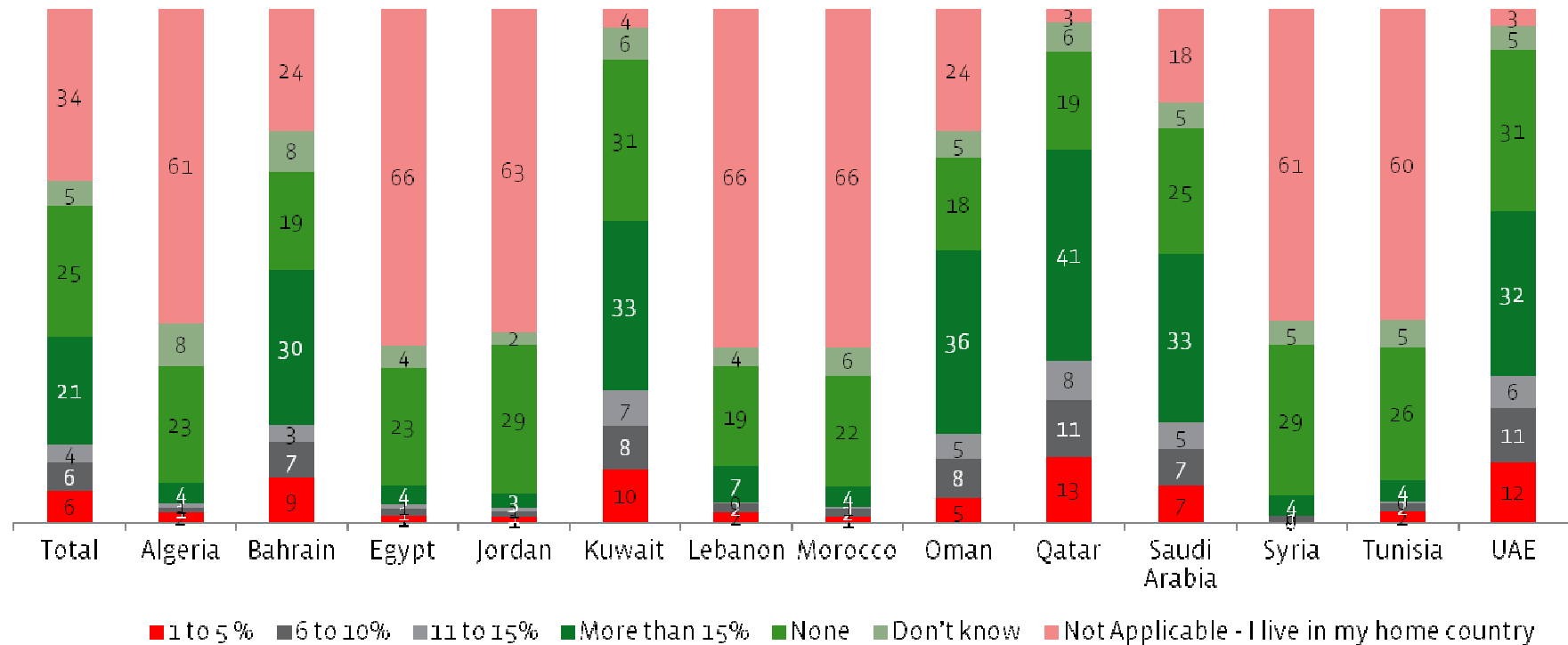


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Q. On an average, what percentage of your monthly personal income do you save?

All figures are %'s

Proportion of salary repatriated



Base: Total (15,247), Algeria (621), Bahrain (174), Egypt (3979), Jordan (836), Kuwait (635), Lebanon (389), Morocco (399), Oman (274), Qatar (776), KSA (3487), Syria (85), Tunisia (243), UAE (3349)

Q. On an average, what percentage of your monthly personal income do you repatriate?

All figures are %'s

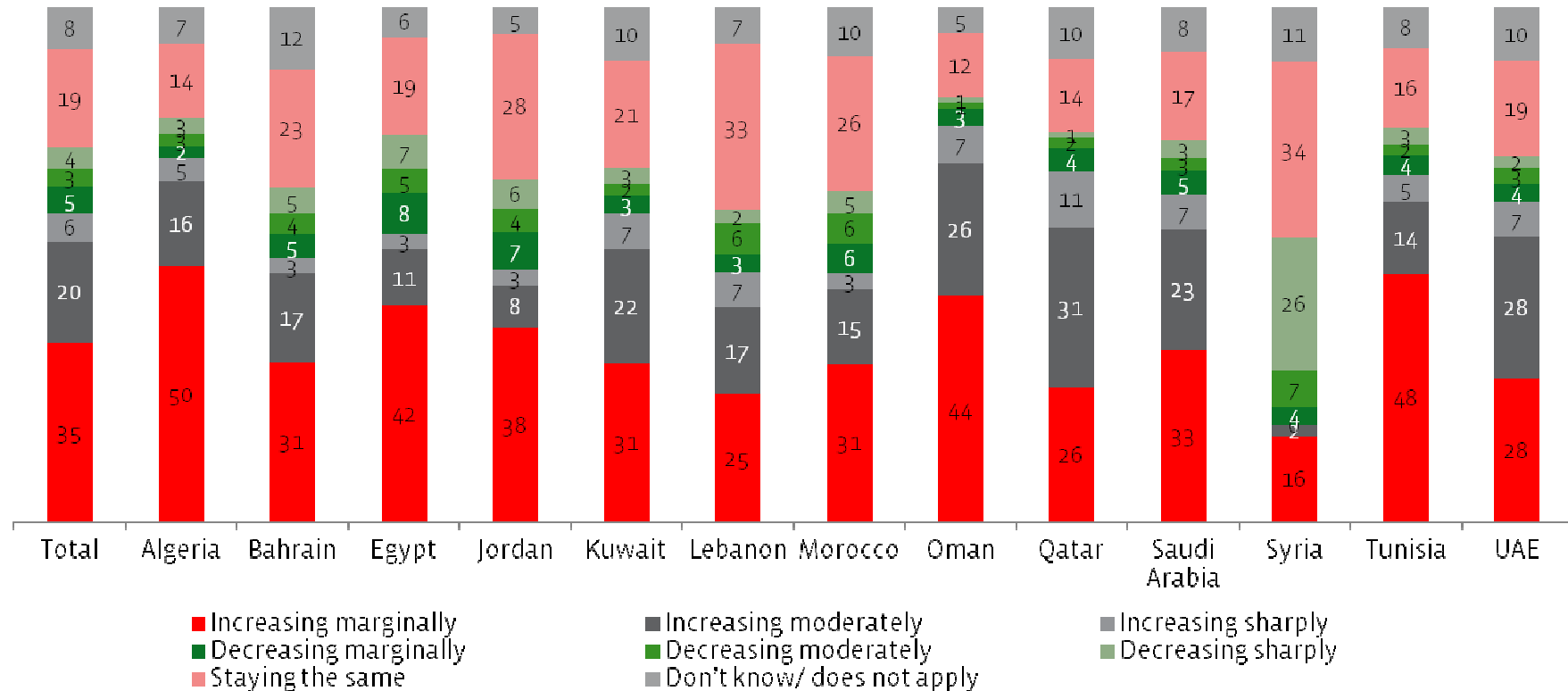
Section 2e

PERCEPTION OF SALARIES IN THE COUNTRY AND QUALITY OF LIFE

Summary

- 61% are of the opinion that salaries in their country of residence are increasing (35% say marginally, 20% say moderately and 6% say sharply).
- The main driver behind increasing salaries is inflation/ increase in costs of living according to 60%.
- Of those who believe that salaries are not increasing sufficiently in their country, 43% cite poor economy as a reason and 31% say it is due to employer-friendly laws.
- In terms of overall quality of life, 41% feel their quality of life is average in comparison to other people of a similar generation in their country of residence.
- 54% say they plan to look for a better job in the same industry in the next 12 months.

Perception of salaries in the country



Base: Total (15,247), Algeria (621), Bahrain (174), Egypt (3979), Jordan (836), Kuwait (635), Lebanon (389), Morocco (399), Oman (274), Qatar (776), KSA (3487), Syria (85), Tunisia (243), UAE (3349)

Q. In general, are salaries increasing or decreasing in your country of residence?

All figures are %'s

Factors causing salaries to increase

	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
Base: Salaries in country of residence is increasing	9139	440	89	2224	409	380	189	193	211	529	2217	16	164	2078
Inflation/rise in cost of living	60	70	57	60	79	57	80	48	62	56	61	75	77	54
Growth in opportunities and economic growth in my country of residence	29	13	24	18	13	26	10	25	38	46	34	0	16	39
Pay rises in public sector	18	26	20	17	20	20	21	12	20	18	18	19	16	15
Good corporate performance	14	5	15	12	11	13	8	12	13	14	16	0	9	17
Economic growth and rising salaries in other countries	14	7	25	10	11	14	8	13	18	16	18	6	3	16
Intense competition for talent	13	5	18	9	9	13	12	10	14	14	15	0	13	16
Depreciation of US dollar	11	4	10	16	7	13	6	3	8	8	11	31	4	9
Removal of NOC clause/ Greater flexibility to switch jobs	4	1	7	2	2	4	2	2	6	8	5	0	2	7
Other	6	8	3	7	11	5	5	7	5	4	7	0	8	4
Don't know/ not sure	10	9	13	13	9	13	10	18	7	5	10	6	9	9

Q. Which of these factors do you think are causing salaries to increase in your country of residence?

All figures are %'s

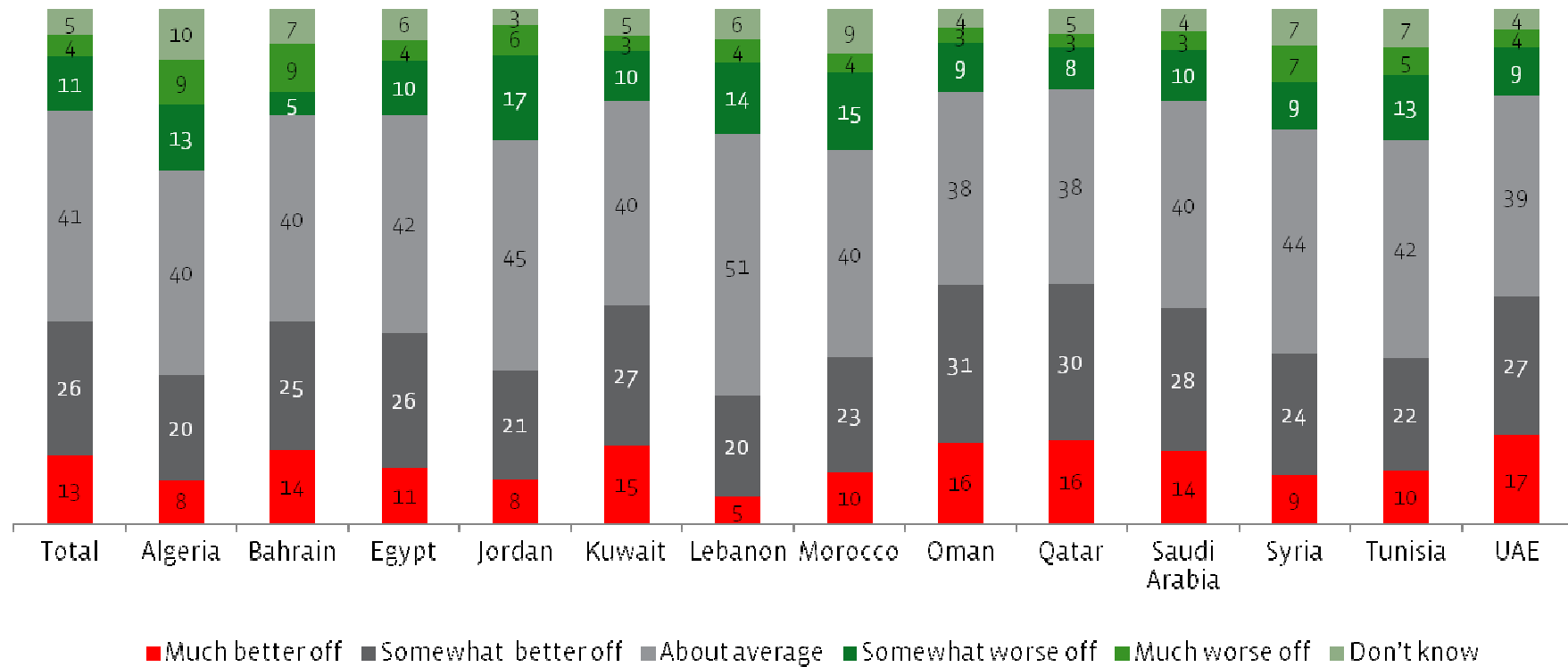
Reasons for salaries not increasing

	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
Base: Salaries in country of residence is decreasing	4872	137	64	1524	384	189	173	168	49	169	974	60	60	921
Poor economy	43	26	47	65	61	24	67	26	29	22	23	60	57	29
Employer-friendly laws	31	34	27	30	38	29	20	47	24	27	41	10	33	21
Poor corporate performance/ profitability	23	18	19	22	27	27	23	27	16	17	24	17	10	23
More top talent than top jobs in local recruitment market today	18	7	16	14	22	18	20	21	18	18	20	5	17	23
Tax-free environment of GCC countries	8	2	13	4	10	12	6	2	6	13	12	3	3	11
Don't know/ not sure/ not applicable	19	31	22	13	16	22	13	18	35	22	23	28	15	23

Q. Which of these factors do you think are causing salaries to not increase sufficiently in your country?

All figures are %'s

Overall quality of life



Base: Total (15,247), Algeria (621), Bahrain (174), Egypt (3979), Jordan (836), Kuwait (635), Lebanon (389), Morocco (399), Oman (274), Qatar (776), KSA (3487), Syria (85), Tunisia (243), UAE (3349)

Q. Thinking about your quality of life, how would you compare yourself to other people of a similar generation in your country of residence?

All figures are %'s

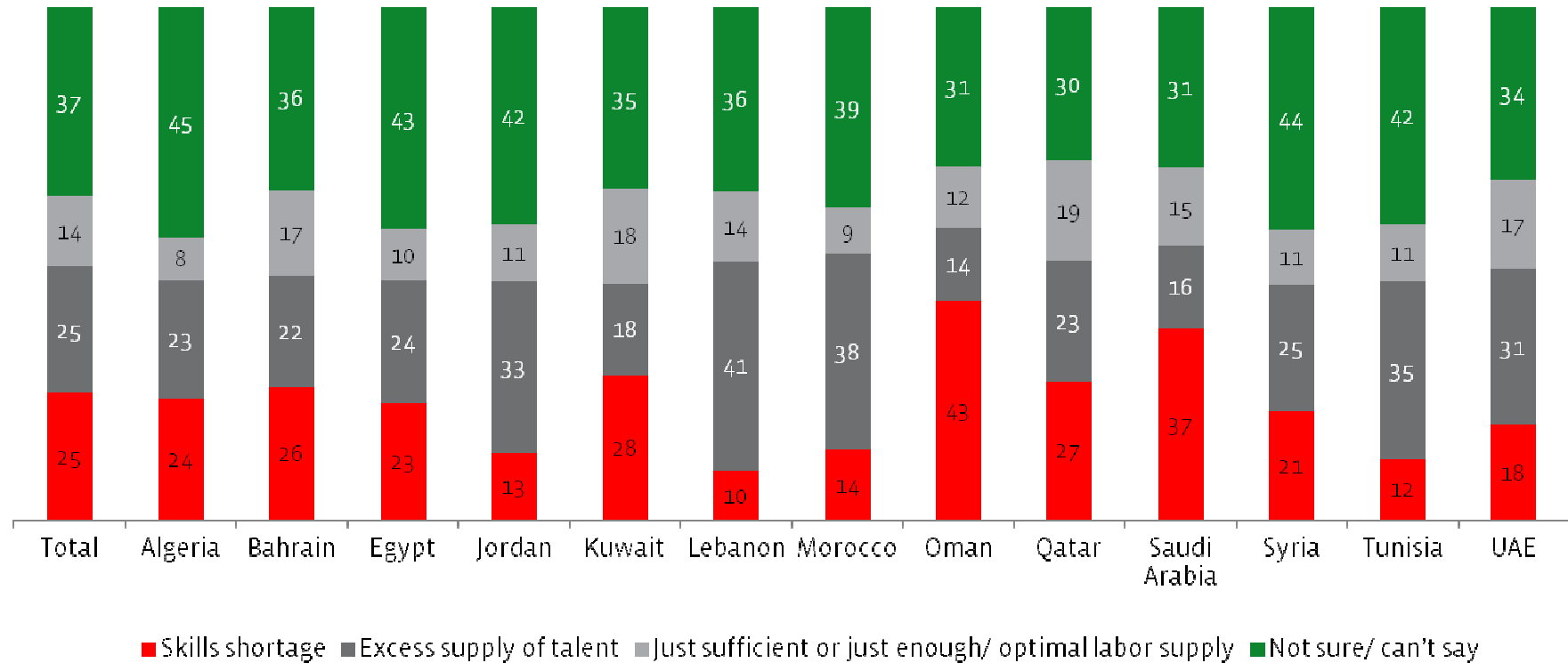
Future plans

	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
Base	15247	621	174	3979	836	635	389	399	274	776	3487	85	243	3349
Look for a better job in same industry	54	37	44	54	51	57	43	46	58	54	56	39	40	60
Look for a better job in a different industry	33	27	41	27	33	34	34	34	33	32	33	16	28	42
Look for a better job as an expat in a different country in Middle East	34	51	40	44	46	23	39	39	27	30	30	61	56	18
Move to another region as an expat	13	21	16	14	21	11	12	16	11	11	12	32	20	11
Return to home country	5	1	3	1	2	12	2	1	8	7	9	1	0	7
Other	4	5	3	4	4	3	6	5	2	3	4	2	4	3
Nothing/ None of these	9	8	9	9	9	10	12	11	10	10	10	6	12	8

Q. Which of the following do you intend to do in the next 12 months?

All figures are %'s

Skills/ labor supply status in country of residence



Base: Total (15,247), Algeria (621), Bahrain (174), Egypt (3979), Jordan (836), Kuwait (635), Lebanon (389), Morocco (399), Oman (274), Qatar (776), KSA (3487), Syria (85), Tunisia (243), UAE (3349)

Q. Do you believe that in your country of residence there is a...

All figures are %'s

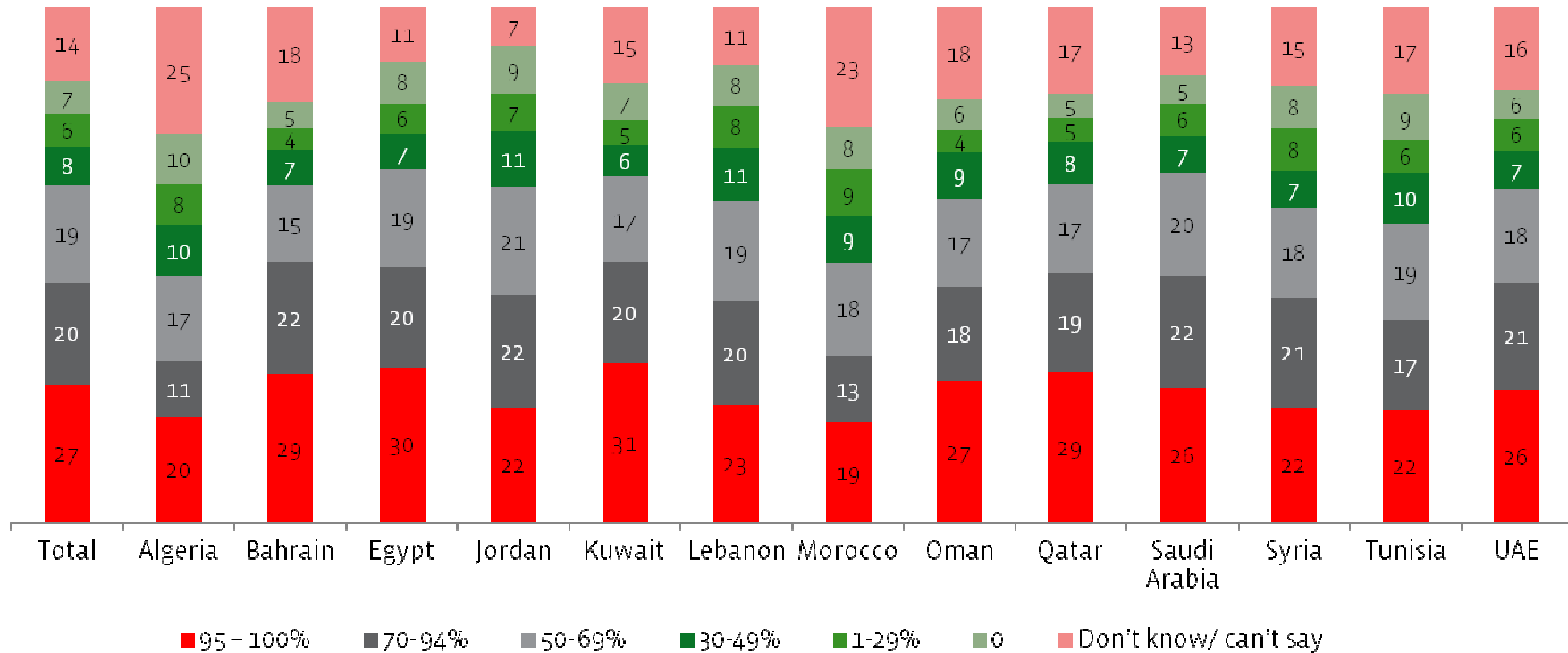
Section 2f

DRIVERS OF LOYALTY

Summary

- Not surprisingly, salary emerges as a strong driver of loyalty as majority claim their loyalty is directly linked to the salary they receive.
- Apart from salary, line manager and opportunities for long term career progression also have an impact on loyalty.

Loyalty towards the company linked to salary



Base: Total (15,247), Algeria (621), Bahrain (174), Egypt (3979), Jordan (836), Kuwait (635), Lebanon (389), Morocco (399), Oman (274), Qatar (776), KSA (3487), Syria (85), Tunisia (243), UAE (3349)

Q. To what extent is your loyalty to your company directly linked to the salary you receive?

All figures are %'s

Loyalty towards the company linked to other variables

	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
Base	15247	621	174	3979	836	635	389	399	274	776	3487	85	243	3349
My line manager	36	23	31	39	49	34	32	31	29	30	39	34	30	32
Opportunities for long term career progression	36	24	35	37	42	36	46	30	30	34	36	22	31	35
My colleagues and the environment I work in	33	28	40	37	38	32	37	30	23	27	31	32	31	32
Senior management	31	17	28	35	35	29	29	17	31	27	35	28	17	26
The nature of my daily responsibilities	28	23	32	29	32	28	28	26	25	28	27	26	23	29
Training and development opportunities	27	23	25	32	33	22	27	23	22	22	28	32	26	21

Q. What other variables most strongly drive your loyalty to the company besides pay?

All figures are %'s

Loyalty towards the company linked to other variables

	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
Base	15247	621	174	3979	836	635	389	399	274	776	3487	85	243	3349
The company brand and reputation	25	12	29	25	25	29	35	18	22	21	24	24	20	29
Physical location of my workplace	19	16	20	22	23	11	21	19	18	12	19	12	22	16
Opportunities to travel	13	11	16	18	18	9	14	9	9	9	12	13	10	10
Other	6	6	6	6	7	5	6	6	4	5	5	5	6	6
None – I am primarily interested in pay	7	15	10	7	7	5	4	13	9	6	7	8	8	6
Don't know – can't say	9	12	10	6	6	14	5	10	9	12	9	6	9	11

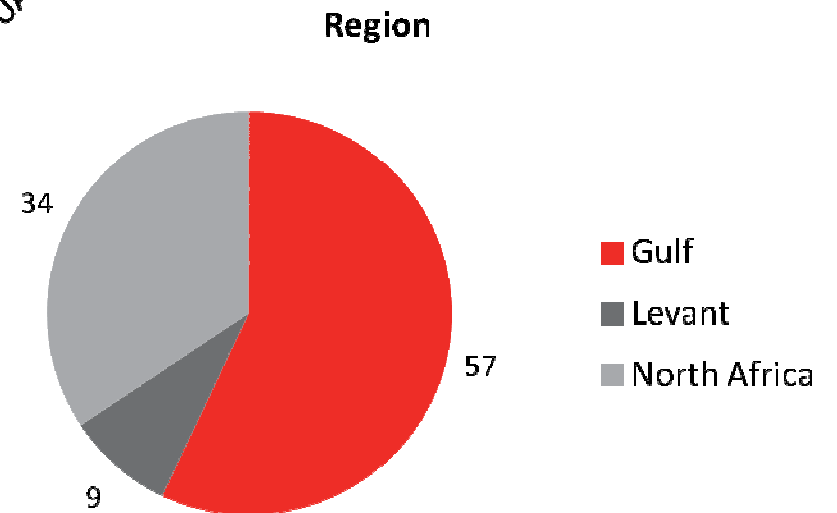
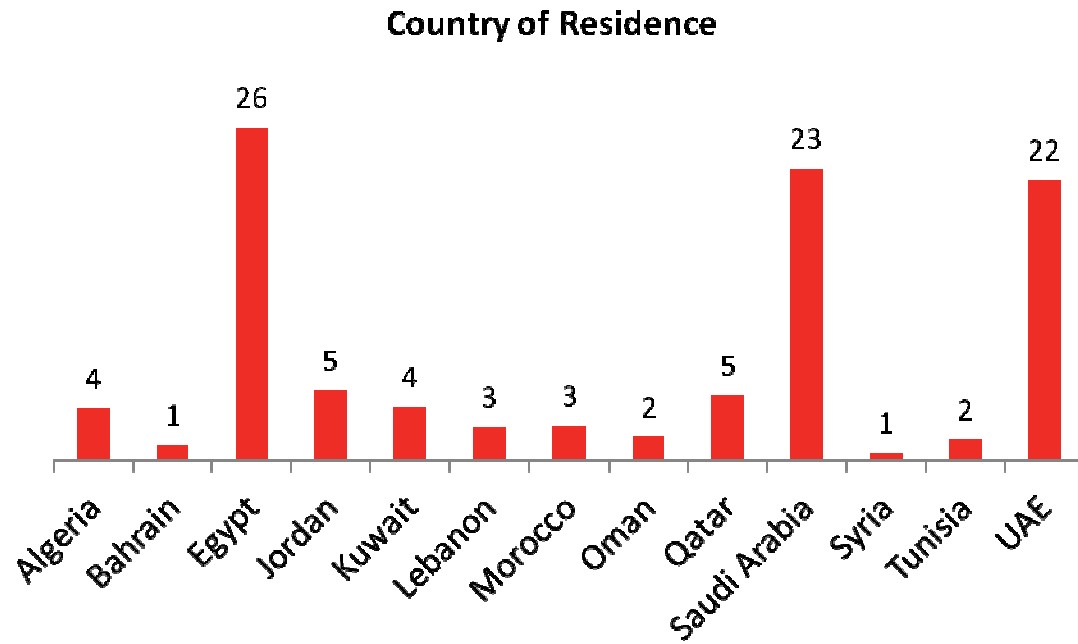
Q. What other variables most strongly drive your loyalty to the company besides pay?

All figures are %'s

Section 3

DEMOGRAPHICS

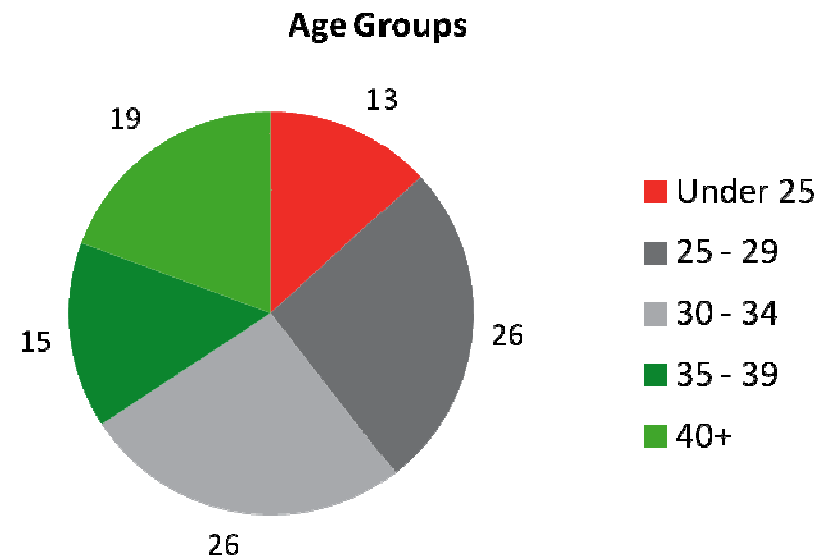
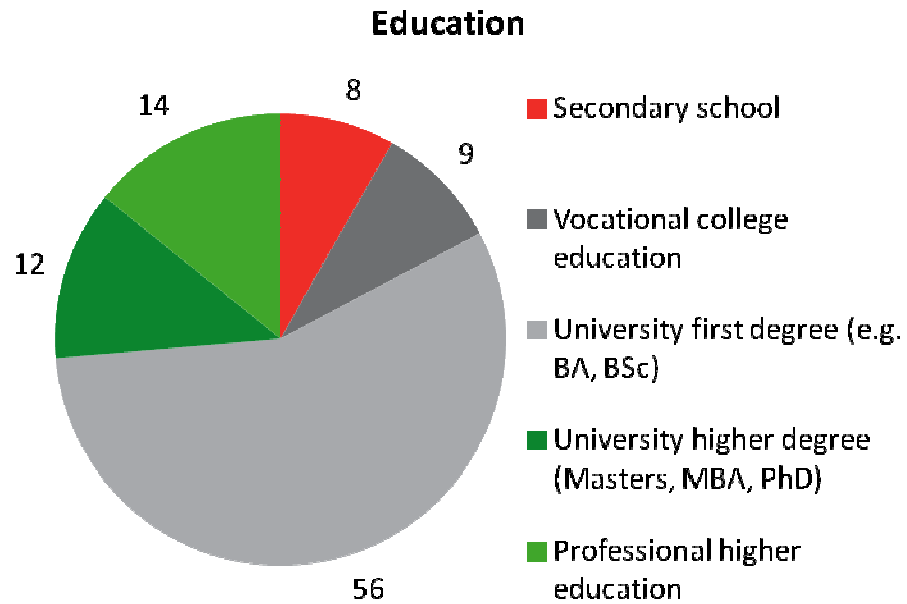
Respondent profile 1/3



Base: Total (15247)

All figures are %'s

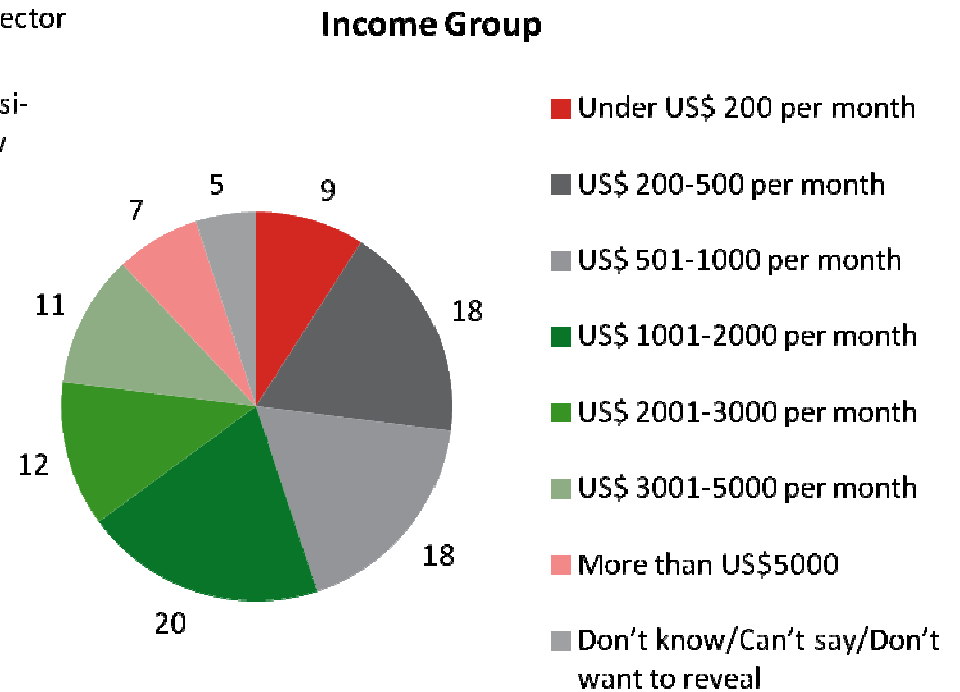
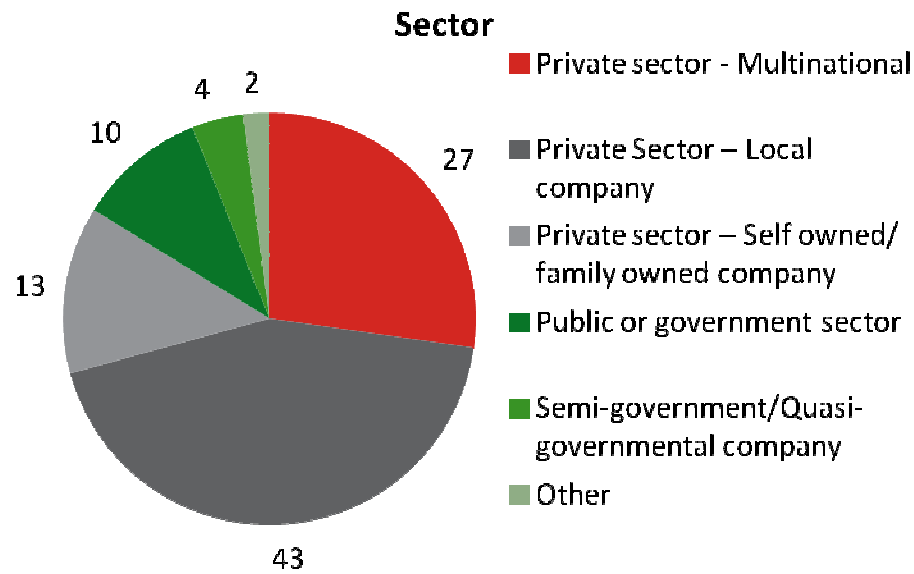
Respondent profile 2/3



Base: Total (15247)

All figures are %'s

Respondent profile 3/3



Base: Total (15247)

All figures are %'s

^ Thank you

