

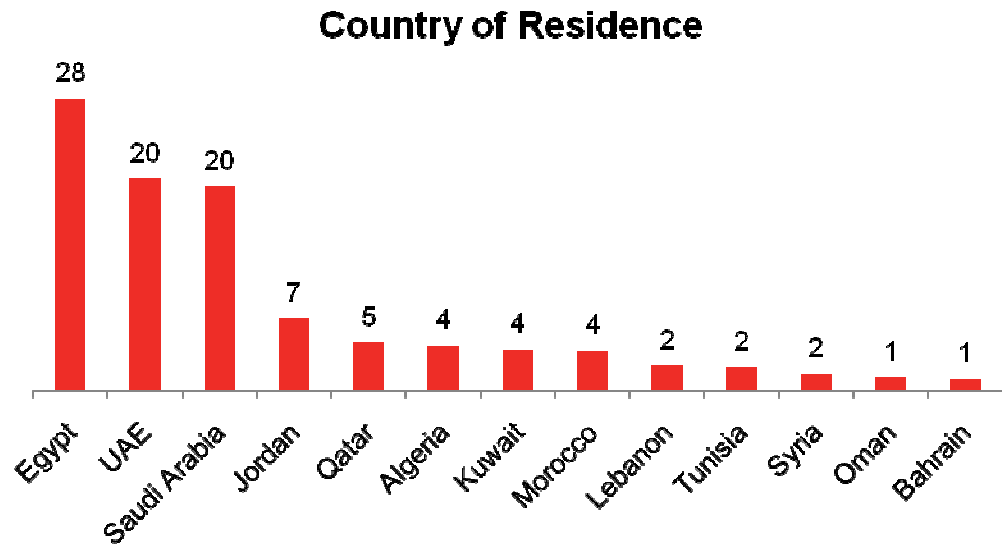
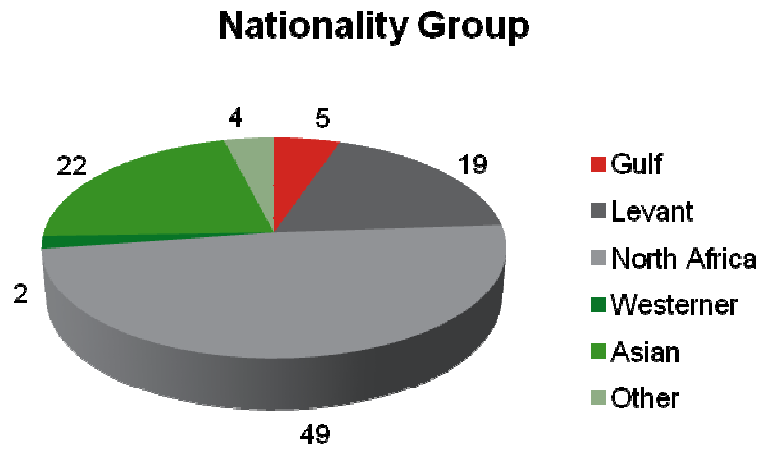
Bayt.com Middle East Salary Survey

March 2012

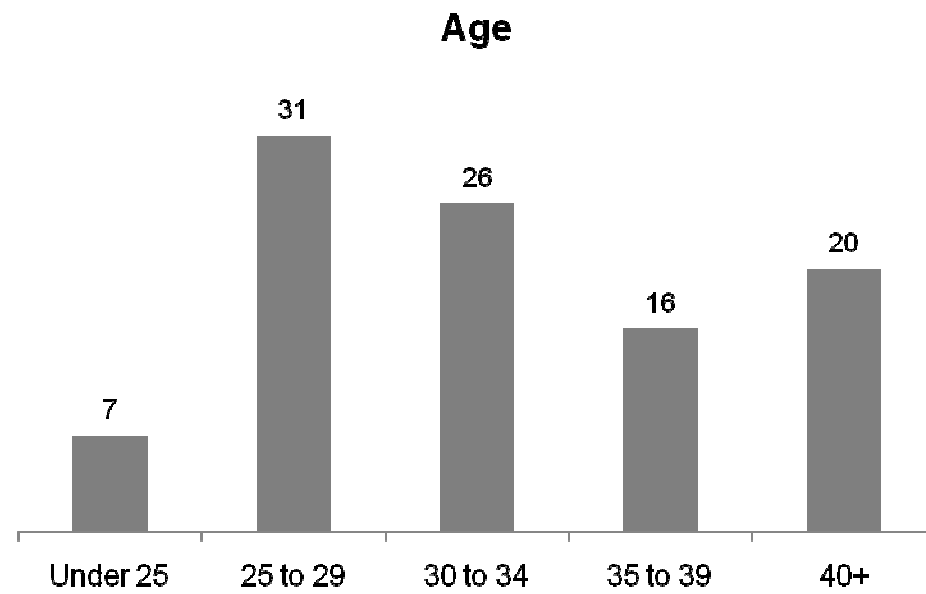
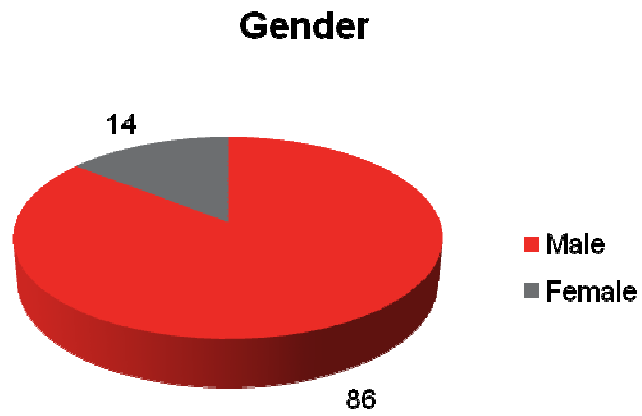


Demographics

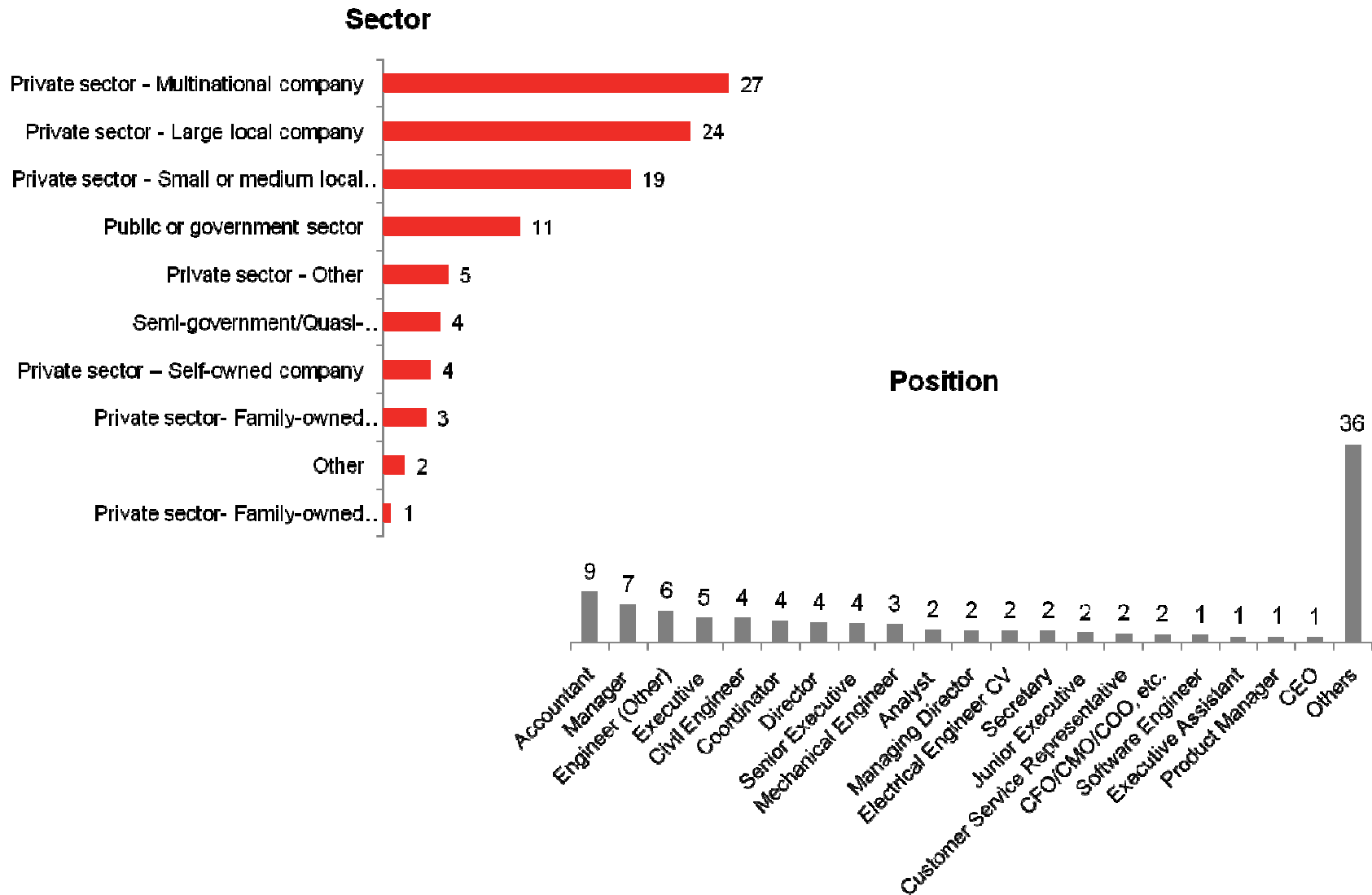
Respondent Profile 1/2



Respondent Profile 2/2



Professional Status

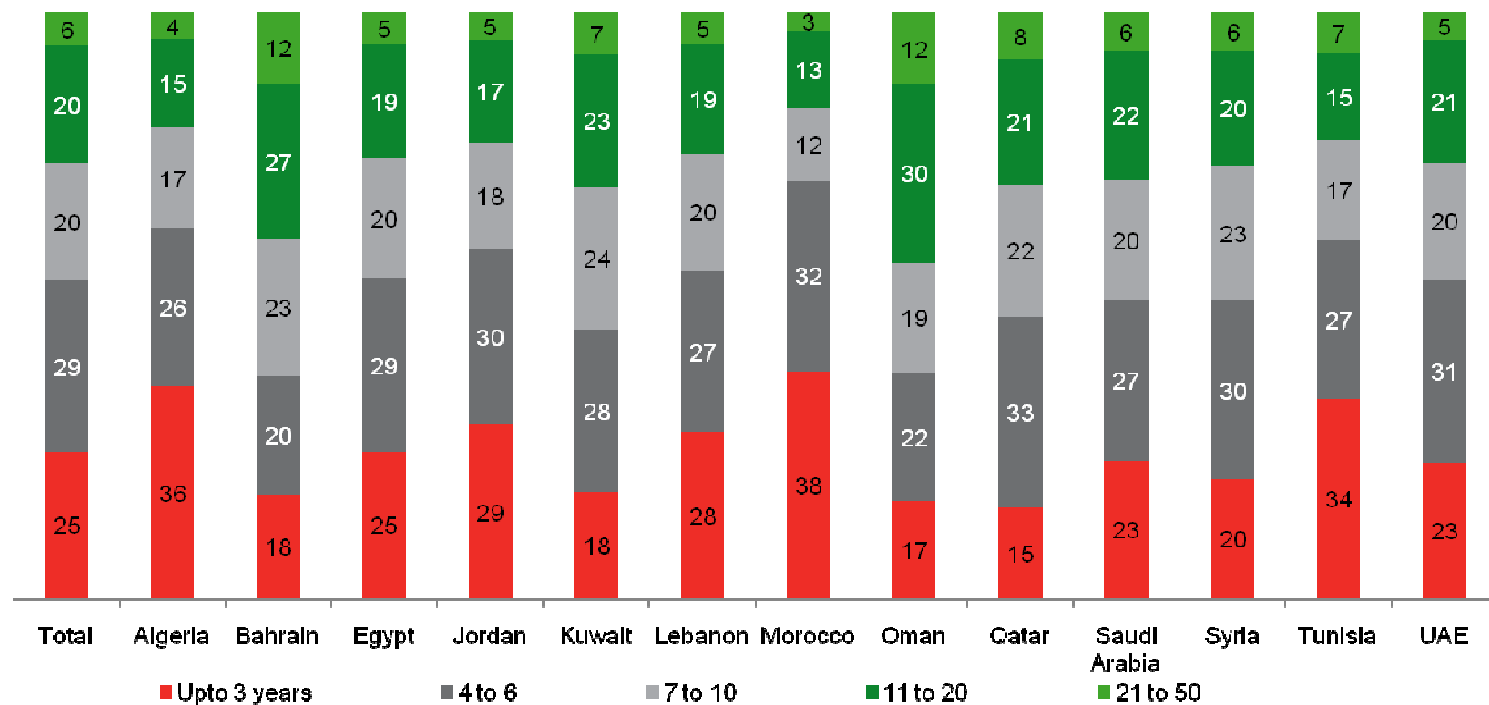


^ About the respondents

Number of years of service in the present career path

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

- Bahrain and Oman have a senior talent pool in comparison to other countries in the region.
- Morocco on the other hand has a younger talent pool.

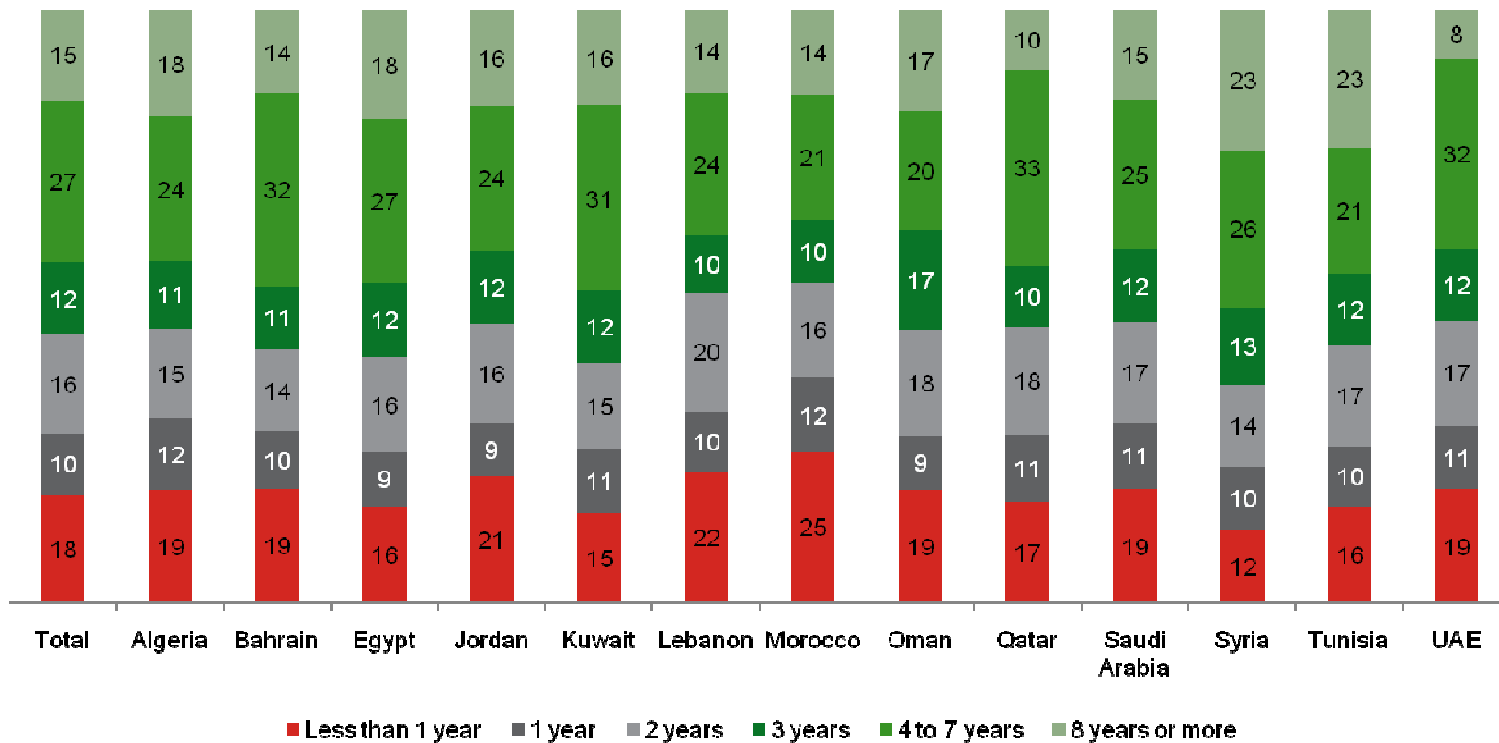


Base: Total (16,067), Algeria (684), Bahrain (168), Egypt (4515), Jordan (1116), Kuwait (627), Lebanon (381), Morocco (604), Oman (197), Qatar (730), KSA (3155), Syria (251), Tunisia (363), UAE (3276)

Number of years working with the current employer

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

- Kuwait and Bahrain have the highest employee retention amongst the GCC nations.

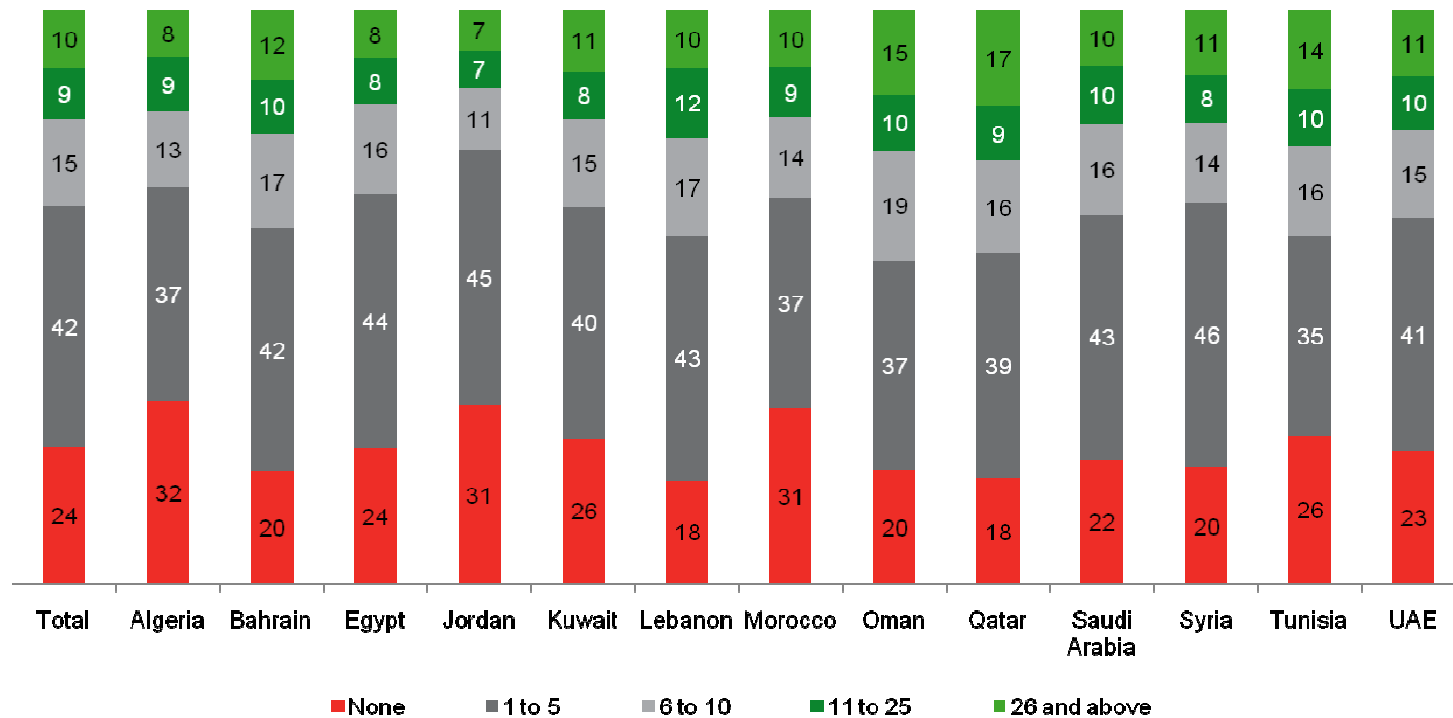


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Number of People Reporting

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

- People in Oman, Qatar and Tunisia have larger pools of people to manage.

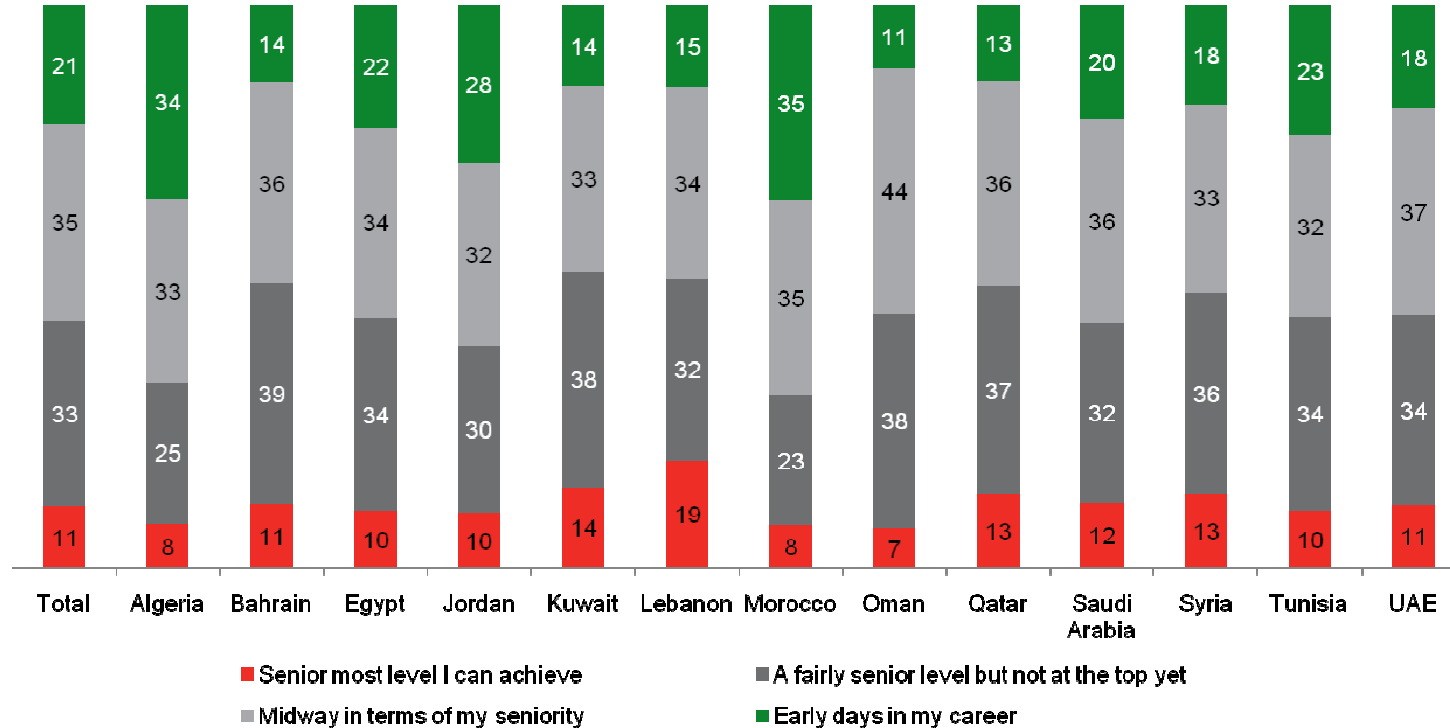


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Position in Career Path

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

- 19% in Lebanon claim they are at the senior most level they can achieve.
- As seen earlier, Morocco has a younger talent pool and they claim they still are in the early days of their career.

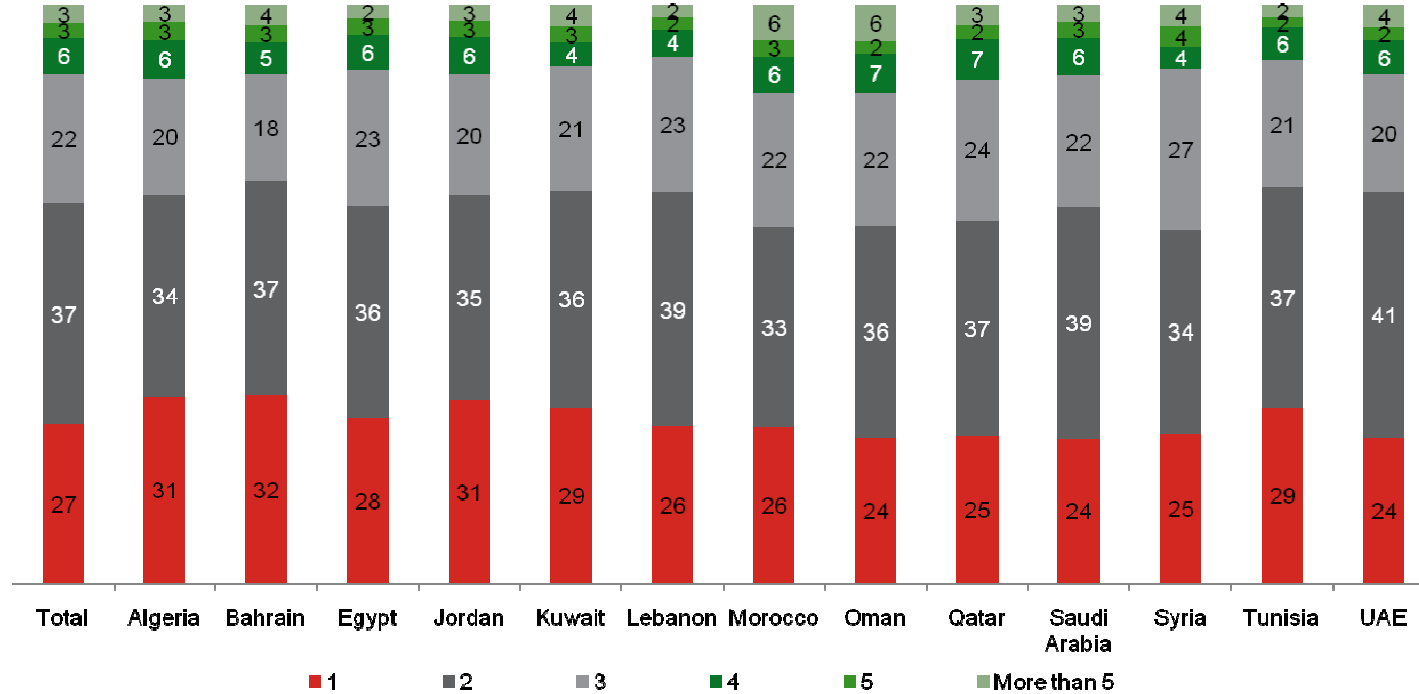


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Number of Jobs Held

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

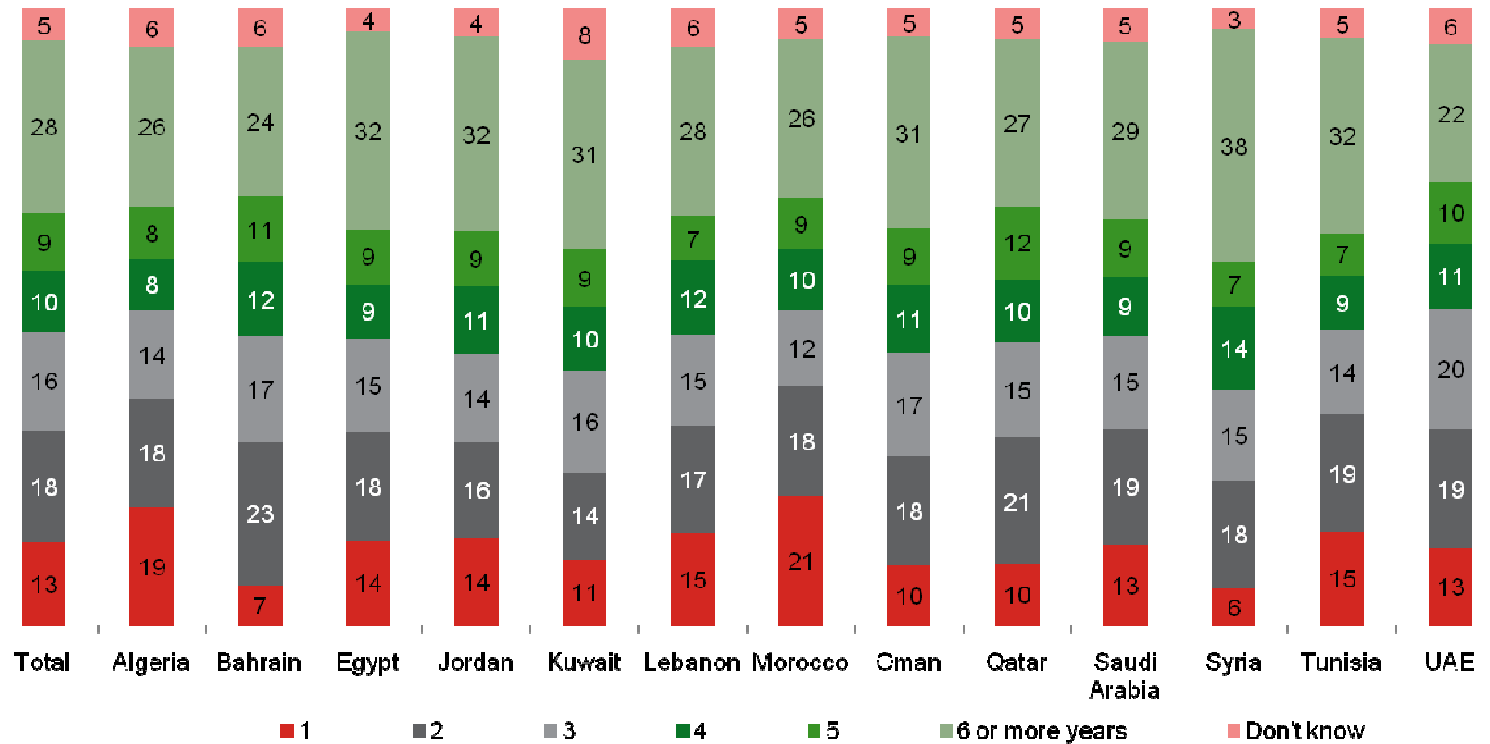
- Across the region 37% of the respondents claim they have held 2 jobs over the past 5 years.



Base: Total (16,067), Algeria (684), Bahrain (168), Egypt (4515), Jordan (1116), Kuwait (627), Lebanon (381), Morocco (604), Oman (197), Qatar (730), KSA (3155), Syria (251), Tunisia (363), UAE (3276)

Average Length of Jobs Held

Q: What is the average length of time you have ever held a job (in years)?

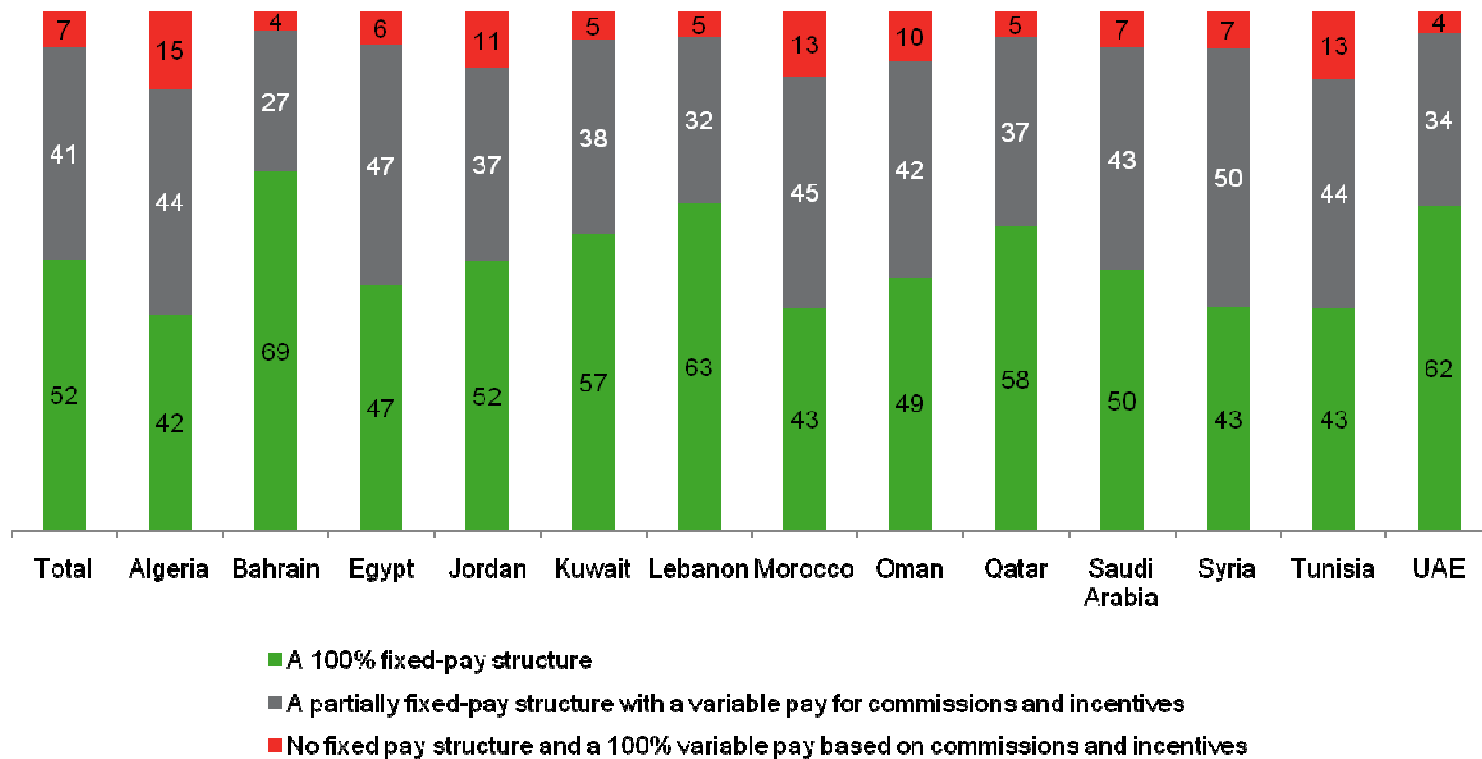


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Preferred pay structure

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

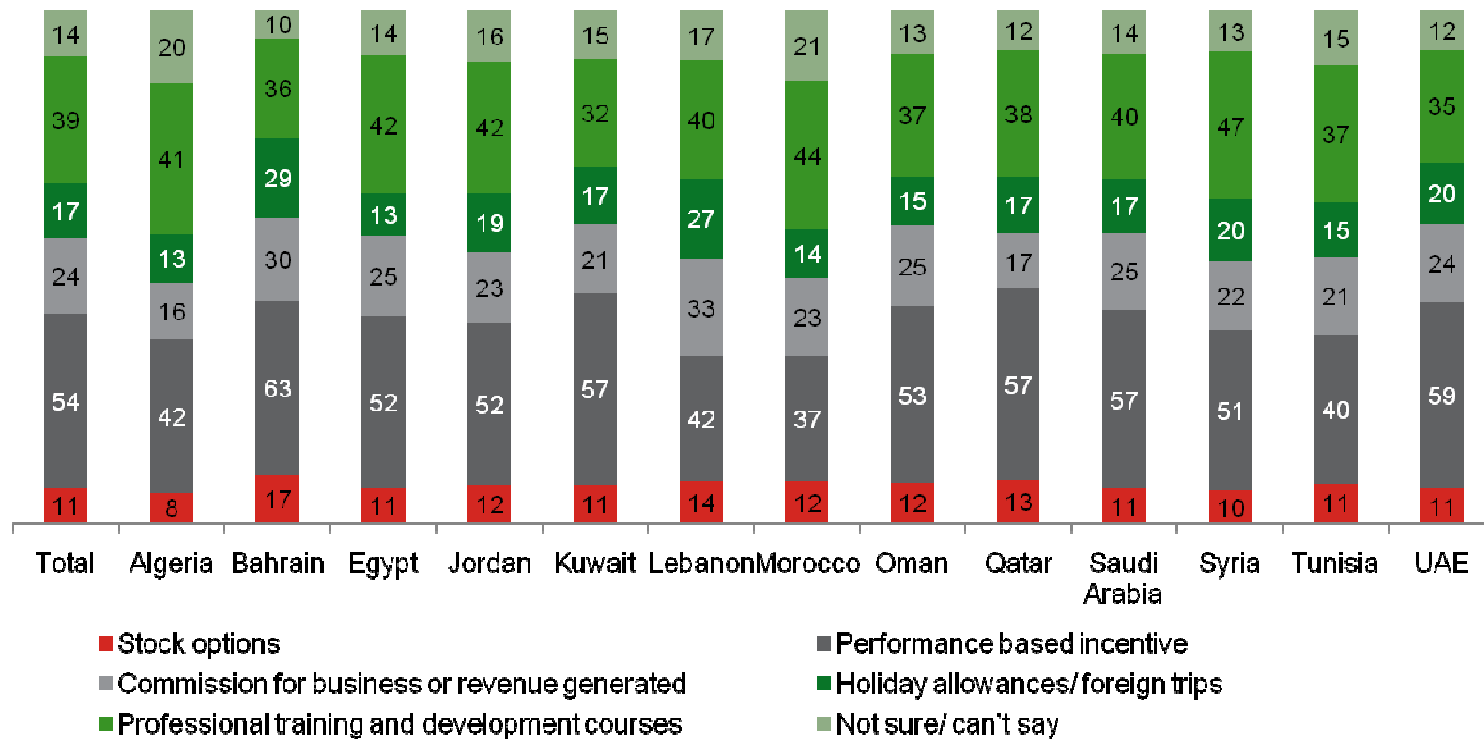
- Bahrain, Lebanon and UAE have higher preference towards having a 'Fixed-pay' structure.
- On the other hand people in Egypt (47%) and Morocco (45%) prefer 'partial' structure.



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Additional Incentives

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?

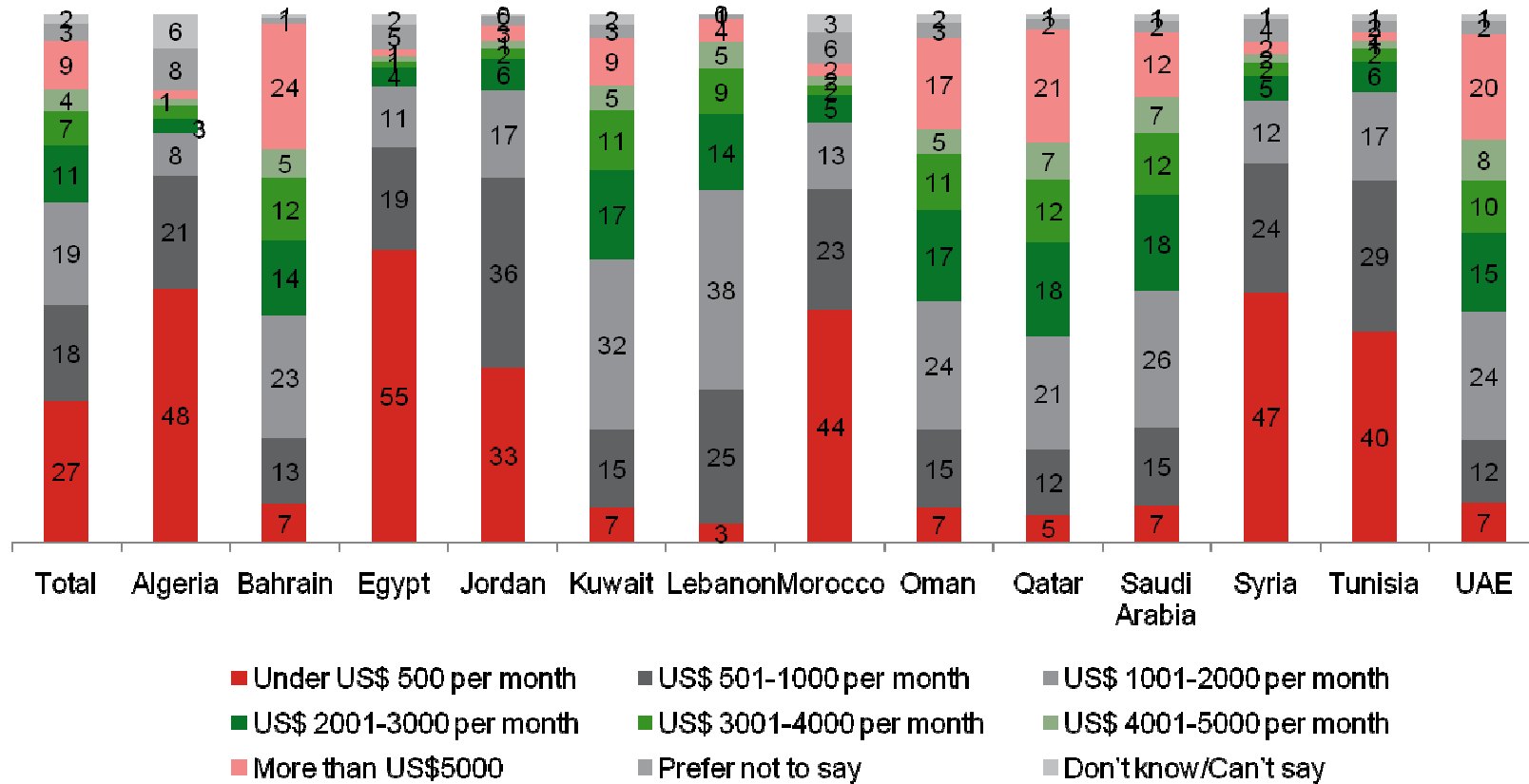


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Current Package

Personal Income

Q: Which of the following income levels does your personal monthly income fall into?

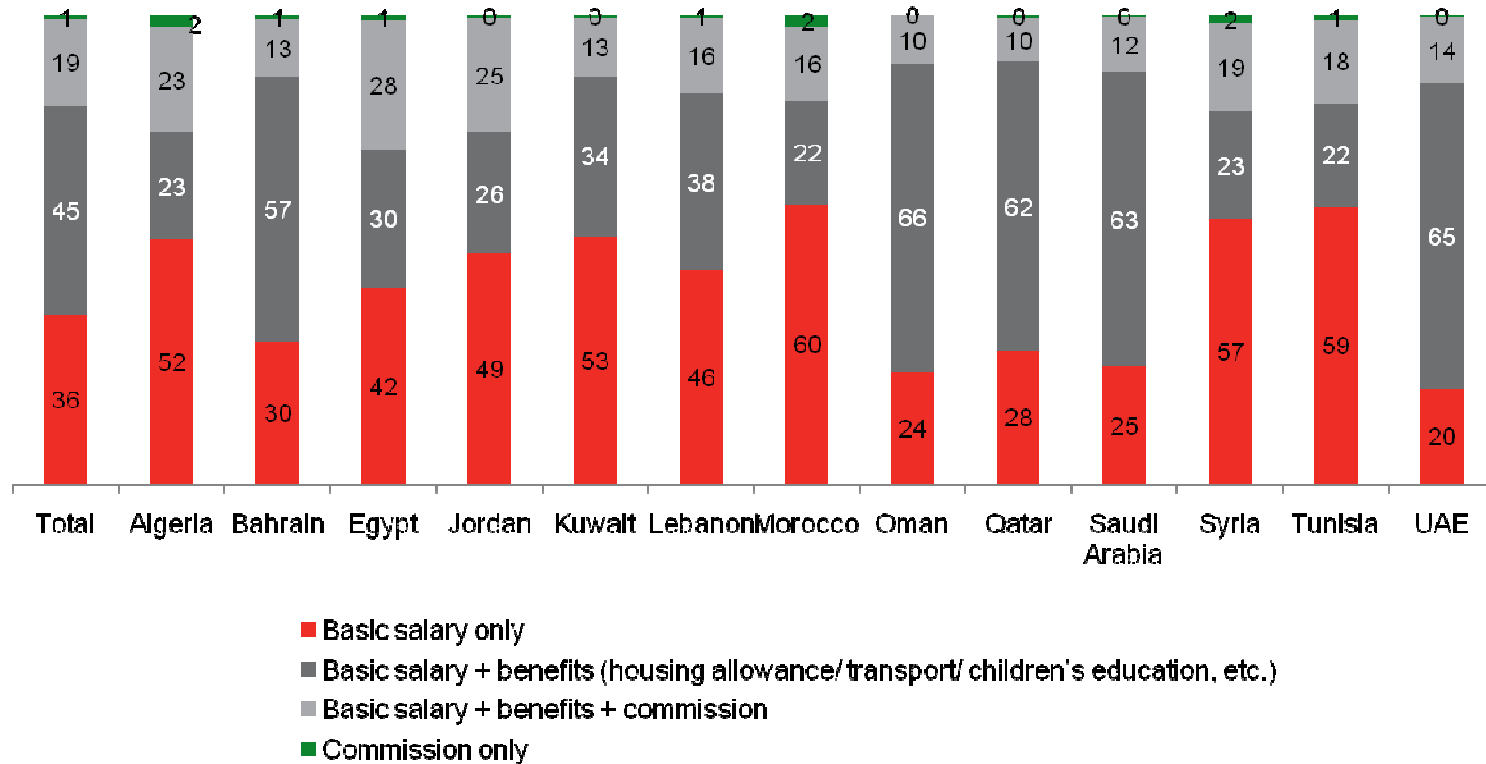


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Composition of Current Package

Q: The current salary you get includes:

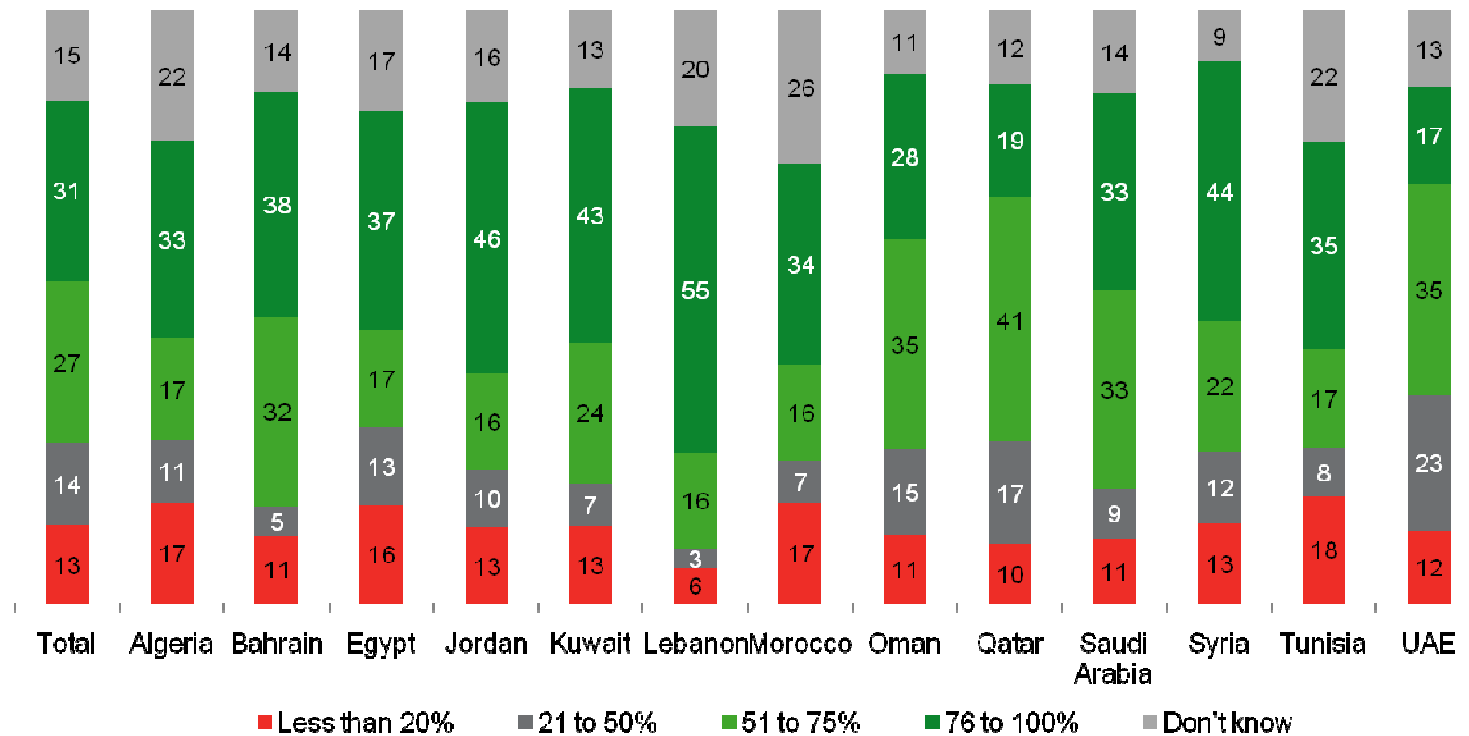
- 'Basic salary + Benefits' is more common in the GCC countries.
- In North African countries 'Basic Salary only' appears to be the norm.



Base: Total (16,067), Algeria (684), Bahrain (168), Egypt (4515), Jordan (1116), Kuwait (627), Lebanon (381), Morocco (604), Oman (197), Qatar (730), KSA (3155), Syria (251), Tunisia (363), UAE (3276)

Proportion of Basic Salary

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

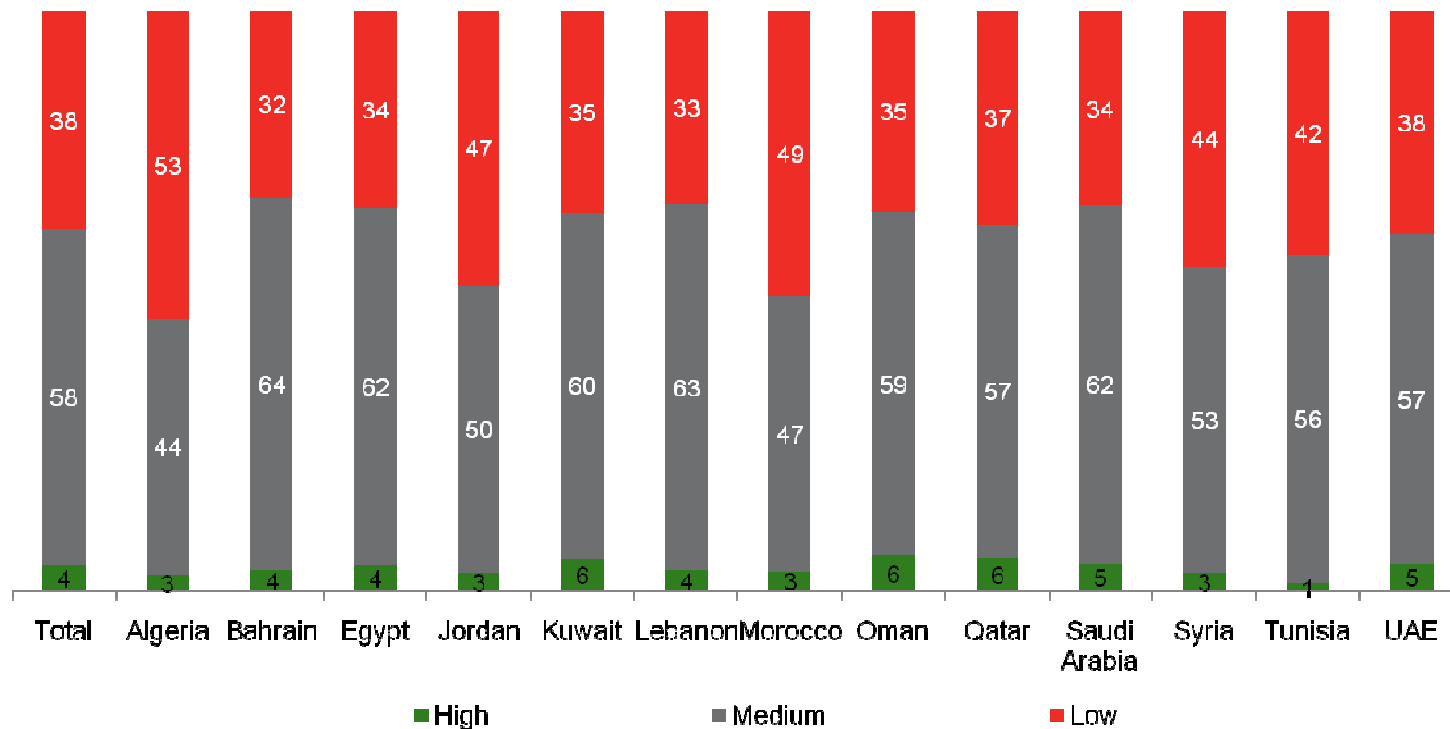


Base: Those who receive salary + Benefits/ commission (10,194), Algeria (311), Bahrain (116), Egypt (2589), Jordan (564), Kuwait (293), Lebanon (205), Morocco (229), Oman (150), Qatar (150), KSA (2360), Syria (105), Tunisia (145), UAE (2607)

Satisfaction with Income

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

- Medium to low satisfaction with current package can be seen across the region.



Base: Total (16,067), Algeria (684), Bahrain (168), Egypt (4515), Jordan (1116), Kuwait (627), Lebanon (381), Morocco (604), Oman (197), Qatar (730), KSA (3155), Syria (251), Tunisia (363), UAE (3276)

Additional Benefits 1/2

Q: Please tell us which of the following are included in the compensation / benefits you receive from your current company.

- 'Personal Medical insurance' and 'Bonus' are the two most common benefits included in the compensation provided.
- 'Personal air ticket' is provided in the GCC.

	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
Personal medical insurance	49	50	42	46	47	35	38	50	54	41	62	37	40	49
Bonus	34	30	42	37	31	30	36	21	49	37	34	25	25	35
Transport allowance	30	27	25	24	22	19	51	24	32	35	43	24	25	30
Personal annual air ticket	26	6	41	4	3	26	3	5	46	52	49	6	6	48
Family medical insurance	25	27	24	15	27	13	13	29	32	21	43	14	24	26
Housing allowance	24	6	27	8	5	18	3	9	36	39	54	9	8	34
Company-provided mobile	19	11	26	18	18	19	9	20	31	25	23	25	22	17
Company-provided accommodation	15	13	14	9	6	14	4	6	32	31	23	8	10	19

Additional Benefits 2/2

Q: Please tell us which of the following are included in the compensation / benefits you receive from your current company

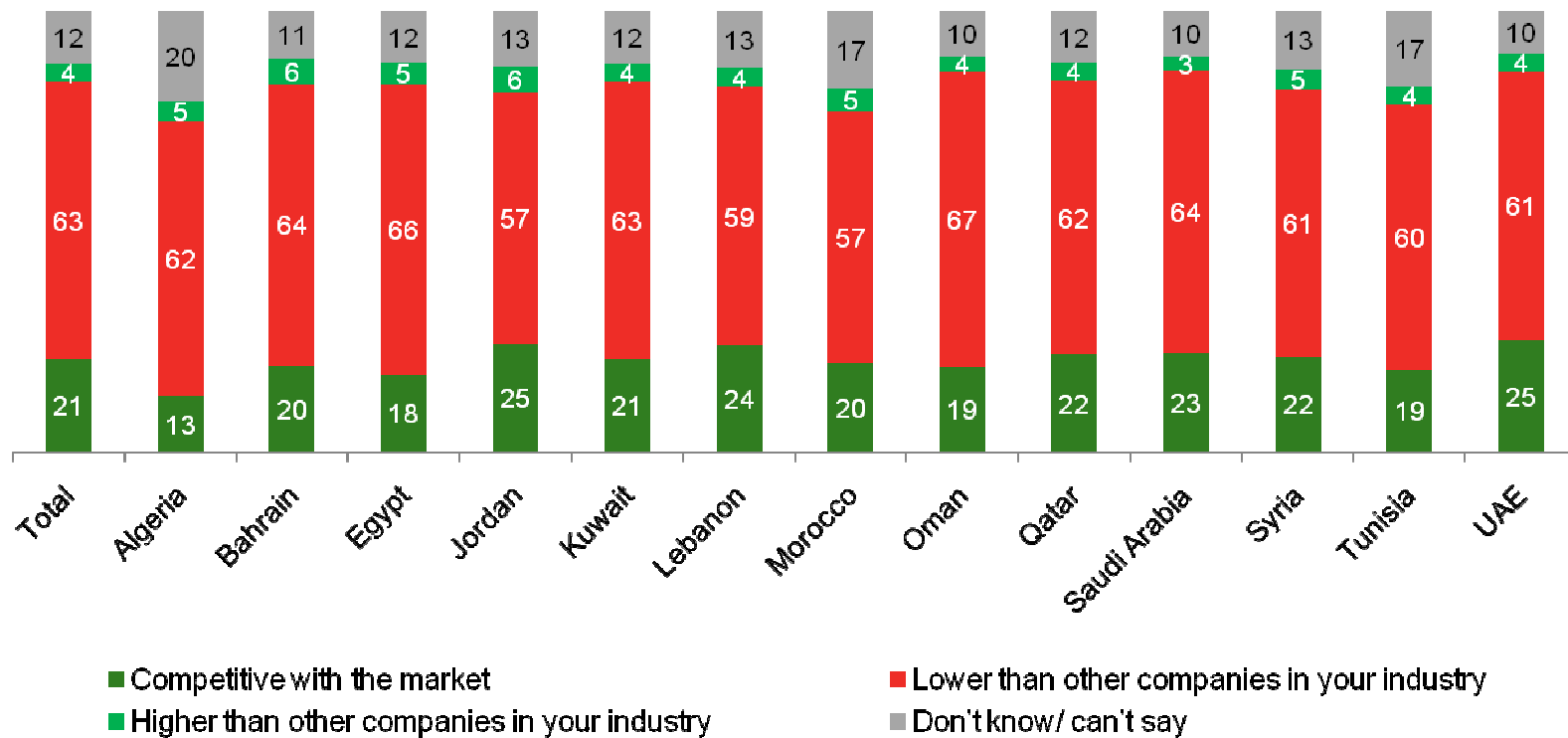
	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
Telecom bills paid by company / allowance	15	9	21	16	11	16	10	12	25	22	15	13	14	15
Gratuity	13	5	23	6	3	8	2	5	33	34	8	5	8	33
Family annual air tickets	13	0	23	2	2	10	1	2	26	26	31	3	3	19
Personal training / development courses allowance	12	9	14	14	12	7	12	10	14	10	13	13	10	10
Holiday allowances / foreign trips	8	7	13	6	4	10	5	5	9	12	12	6	4	9
Children's education allowance	5	4	10	1	2	4	9	4	11	9	8	4	3	8
Stock options	1	1	2	1	1	2	2	1	2	1	1	0	1	2
None / Don't know	19	29	17	25	28	24	23	31	11	9	10	31	27	11

Salary Comparisons and Expectations

Level of Competitiveness of Packages

Q: Do you feel pay in your company is...

- 63% of the total respondents feel that their salaries are lower than the industry standards.
- Interestingly, a quarter of respondents in the UAE and Kuwait claim their salaries are competitive with the market.

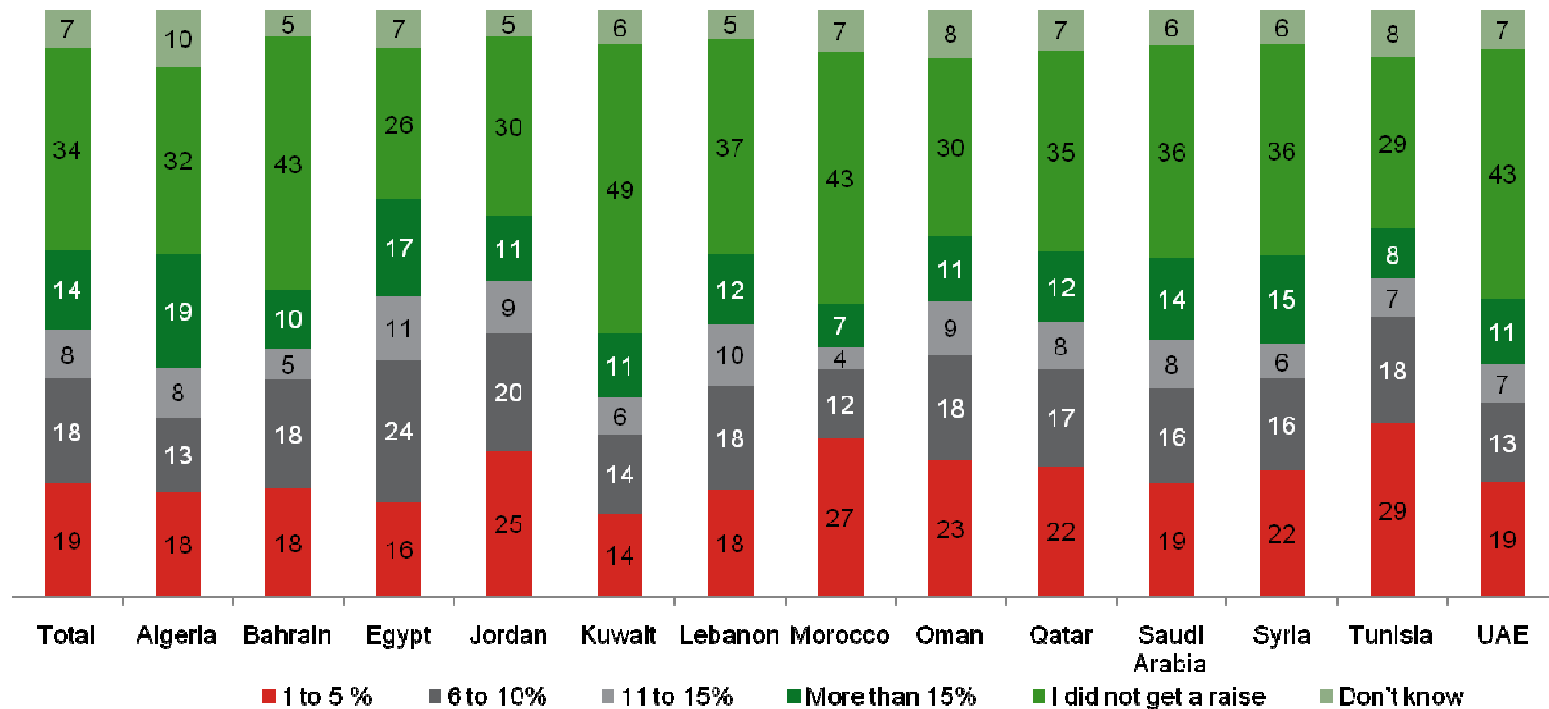


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Raise Received

Q. Can you please select the total percentage raise you received in the past 12 months (December 2010 – December 2011)?

- One in three respondents claim they have not received a raise in the past 12 months.



Base: Total (16,067), Algeria (684), Bahrain (168), Egypt (4515), Jordan (1116), Kuwait (627), Lebanon (381), Morocco (604), Oman (197), Qatar (730), KSA (3155), Syria (251), Tunisia (363), UAE (3276)

^ Satisfaction With Raise Received

Q: Please indicate how satisfied you are with the salary raise you received in 2010-2011?

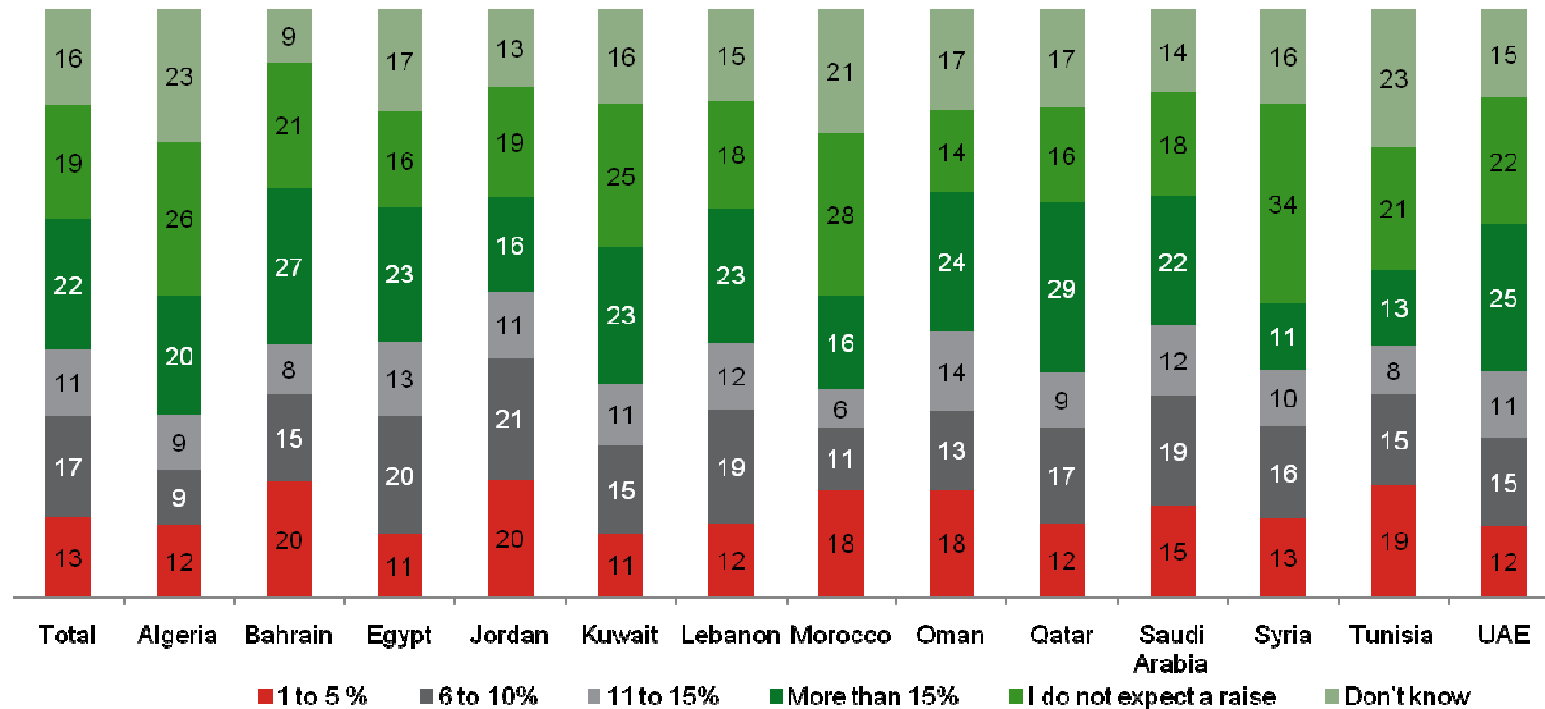
- 46% of the respondents are very unhappy/ unhappy with the raise they received.

	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
BASE: Those who received a RAISE	9482	399	88	3060	725	281	222	301	121	428	1821	146	227	1663
I am very happy with my raise	7	5	6	6	5	6	4	7	9	10	9	2	2	9
I am modestly happy with my raise	19	21	26	19	17	17	20	18	24	18	21	23	19	19
My raise is fair in light of my contributions to the company	10	12	9	9	7	15	14	12	9	13	11	9	10	11
My raise is fair in light of the company's financial situation	10	7	13	14	7	9	13	8	8	9	8	10	13	10
My raise is fair in light of my contribution and the company's financial situation	7	6	8	9	6	5	3	7	3	4	6	9	9	7
I am unhappy with my raise	30	32	28	28	33	35	29	29	31	32	31	29	26	31
I am very unhappy with my raise	16	17	10	15	25	13	17	20	16	14	14	18	21	13

Raise Expected

Q Can you please select the total percentage raise you expect to receive in the next 12 months (December 2011 – December 2012)?

- 65% of the respondents expect to get a raise in the next 12 months.
- 22% expect to get more an increase of more than 15%.



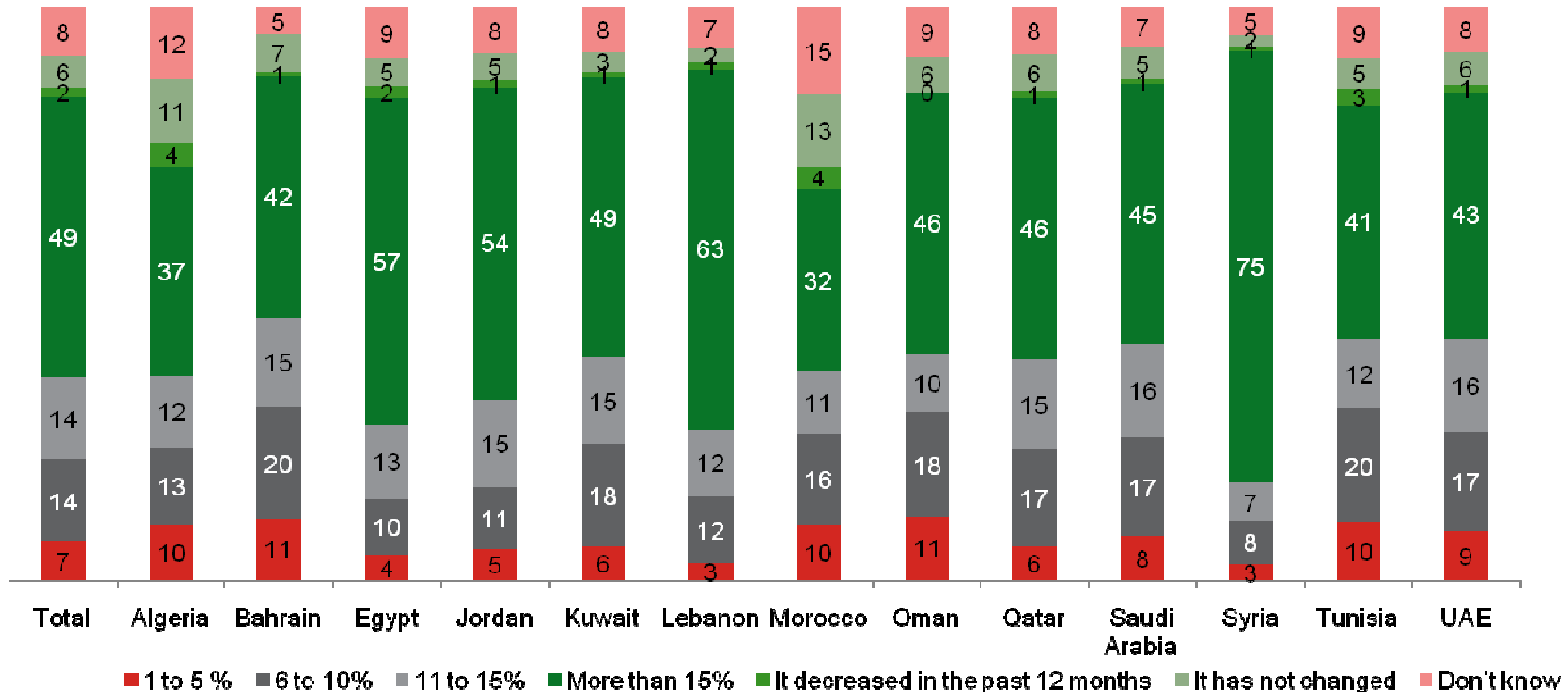
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Cost of Living and Savings

Increase in Cost of Living

Q On average, by what percentage do you think your cost of living has increased in the last 12 months (December 2010 – December 2011)?

- Almost half of the respondents feel that cost of living has gone up 'More than 15%'
- Highest increment is claimed by respondents from Syria.

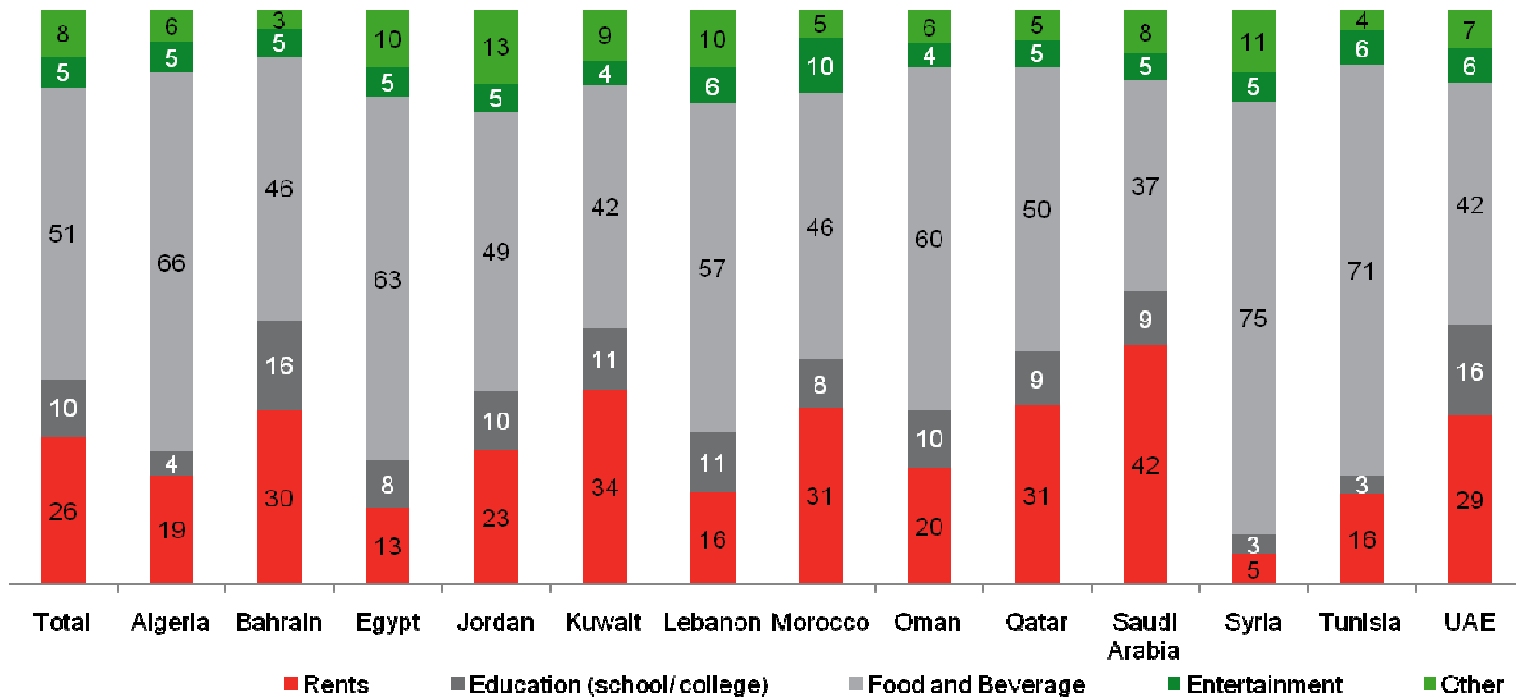


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Factors affected by Increased Cost of Living

Q For which of the following elements have you seen an increase for in the past 12 months?

- Food and Beverage followed by rents are the most affect by the increase in costs.

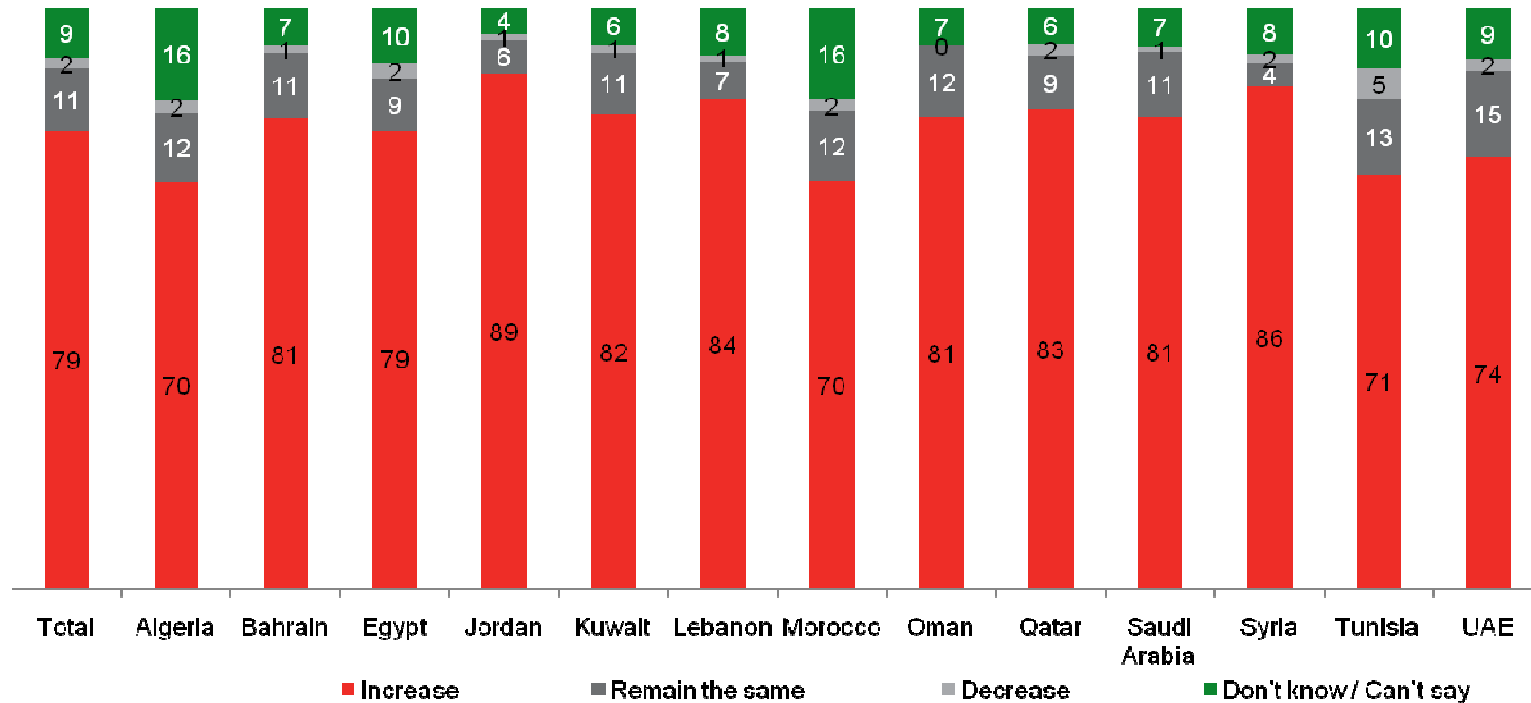


Base: Those who say COL has increased (13,552), Algeria (495), Bahrain (148), Egypt (3804), Jordan (960), Kuwait (550), Lebanon (340), Morocco (412), Oman (168), Qatar (615), KSA (2734), Syria (232), Tunisia (301), UAE (2793)

Expectation of Future Cost of Living

Q: In the next 12 months you expect your cost of living to to:

- Majority of the respondents expect the cost of living to increase further.



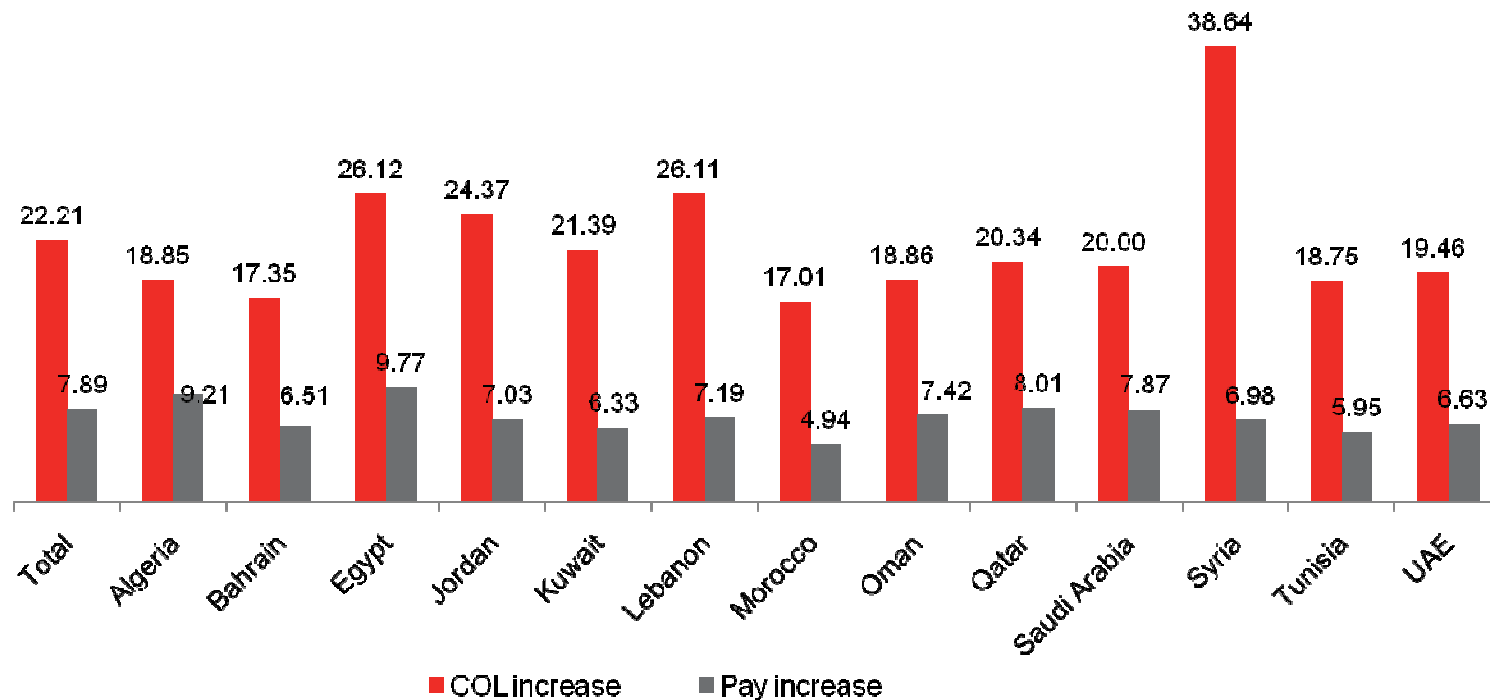
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Average salary raise in the past 12 months against Cost of Living (COL) raise in the past 12 months

Q: Can you please select the total percentage raise you received in the past 12 months (December 2010 – December 2011)?

Q: On average, by what percentage do you think your cost of living has increased in the last 12 months (December 2010 – December 2011)?

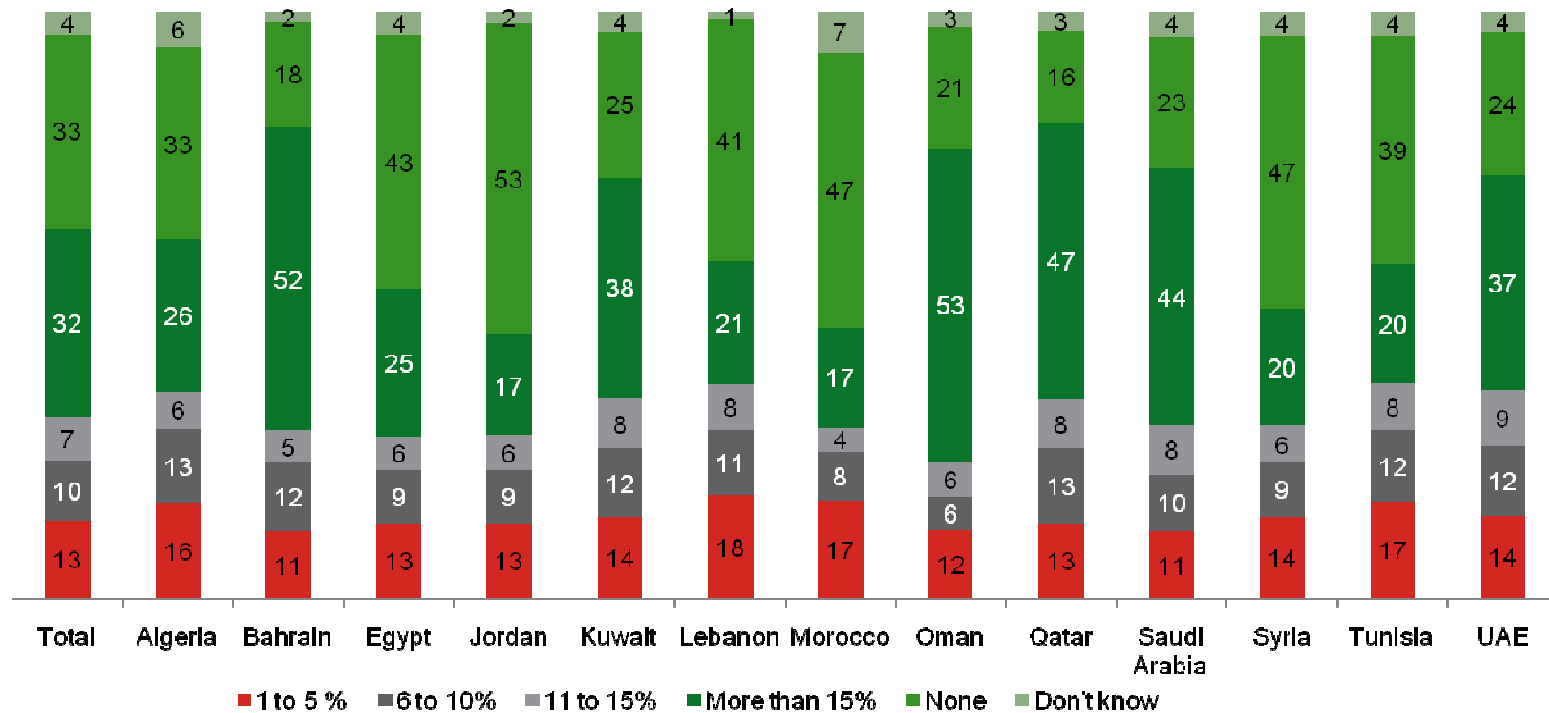
- All countries feel that cost of living has risen 2-3 times more than salary increments
- Syria worst affected.



Proportion of Salary Saved

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

- Respondents from Oman, Bahrain and Qatar claim highest savings in the region.

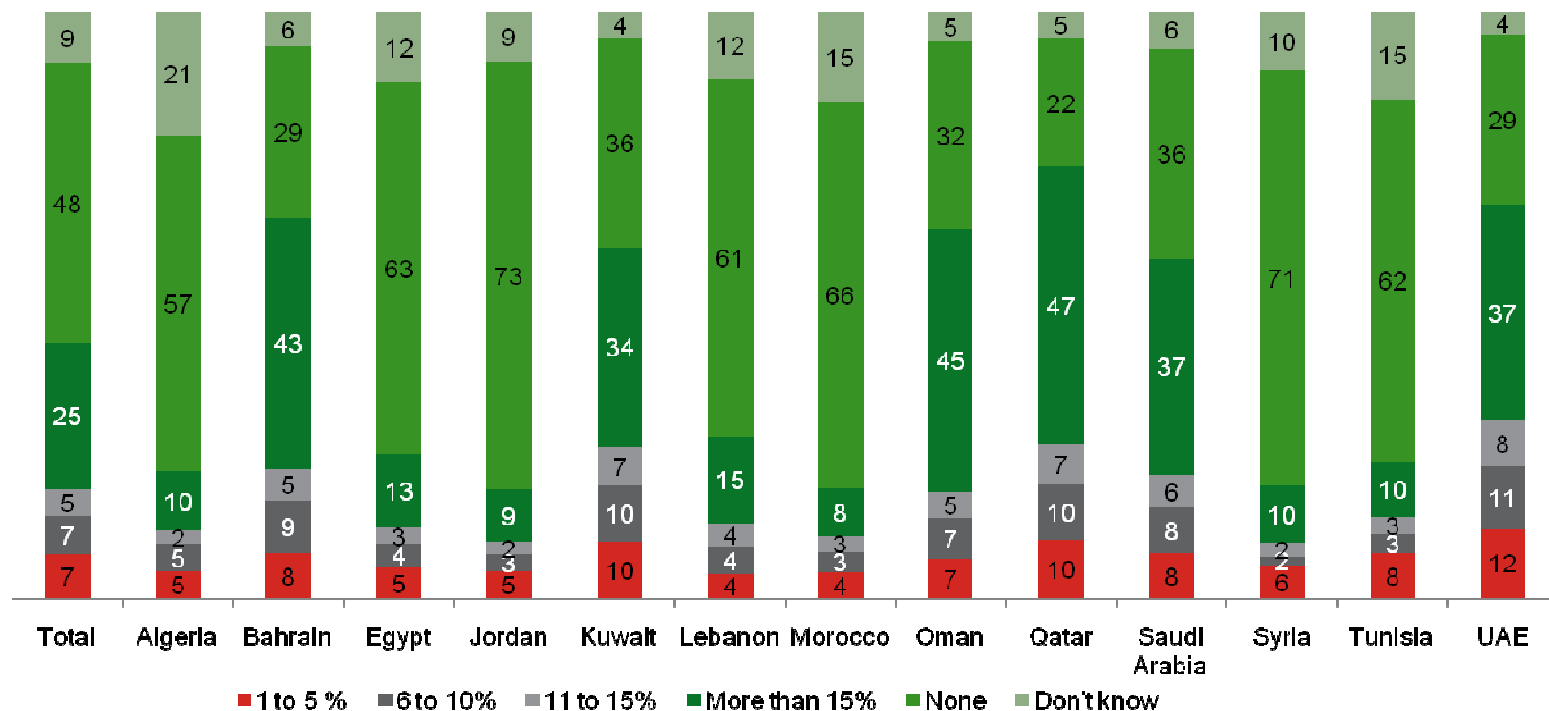


Base: Total (16,067), Algeria (684), Bahrain (168), Egypt (4515), Jordan (1116), Kuwait (627), Lebanon (381), Morocco (604), Oman (197), Qatar (730), KSA (3155), Syria (251), Tunisia (363), UAE (3276)

Proportion of Salary Repatriated

Q: What percentage of your savings do you repatriate to your home country?

- GCC countries see higher repatriation of savings, this being a result of majority expat population in these countries.



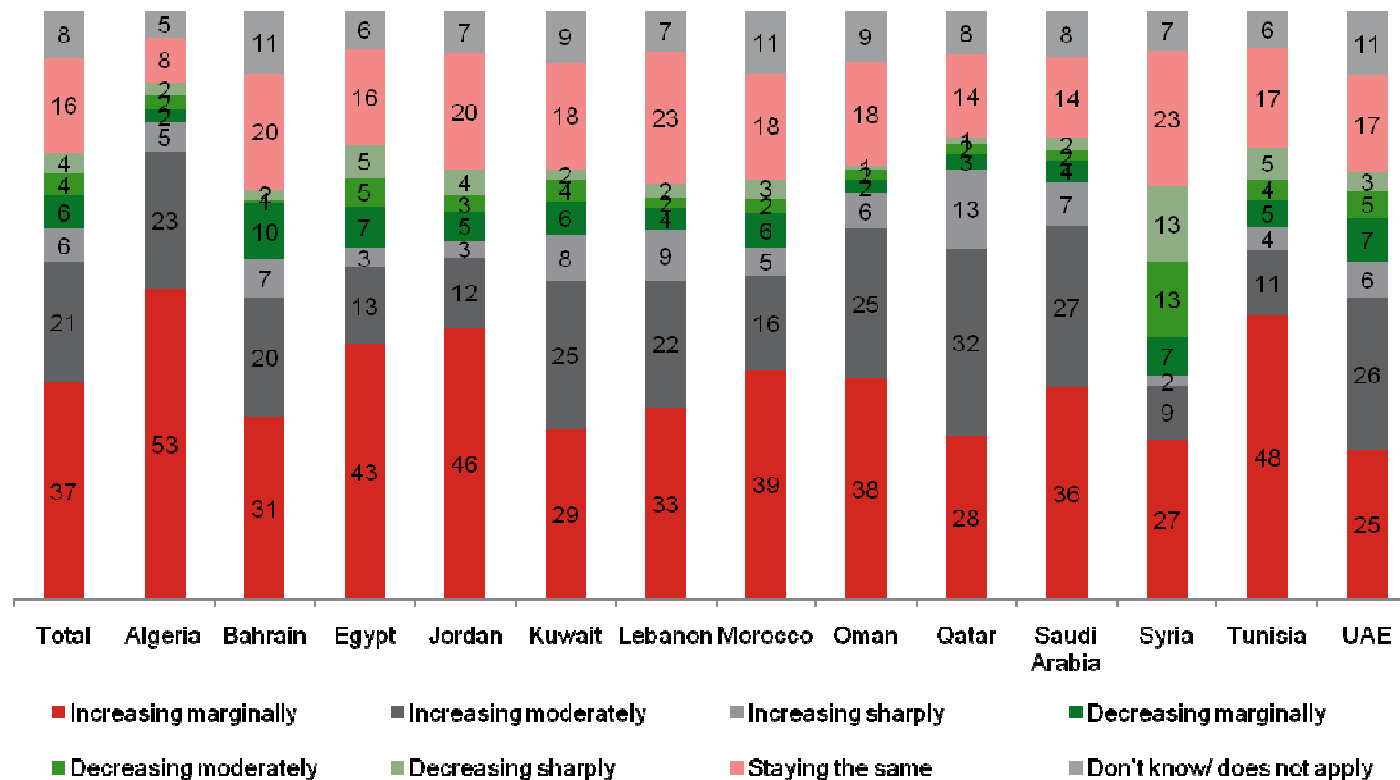
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^ Perception of Salaries in the Country

Perception of Salaries in the Country

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

- Respondents of the opinion that salaries are in general increasing in their country of residence.



Base: Total (16,067), Algeria (684), Bahrain (168), Egypt (4515), Jordan (1116), Kuwait (627), Lebanon (381), Morocco (604), Oman (197), Qatar (730), KSA (3155), Syria (251), Tunisia (363), UAE (3276)

Factors causing salaries to increase

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

- Inflation is cited as the prime reason for salaries to increase.

	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
Inflation/rise in cost of living	58	65	59	56	72	51	81	55	60	54	59	63	61	52
Growth in opportunities and economic growth in my country of residence	25	16	12	18	10	25	7	25	32	43	36	8	15	32
Pay rises in public sector	16	28	13	15	18	16	13	14	19	18	16	13	11	13
Good corporate performance	11	4	6	11	8	10	3	13	15	10	13	3	8	13
Intense competition for talent	10	5	9	8	9	8	5	13	24	7	13	8	9	14
Economic growth and rising salaries in other countries	10	5	14	7	9	13	6	7	19	11	14	4	8	11
Depreciation of US dollar	7	5	14	6	5	10	4	2	7	6	8	17	3	9
Removal of NOC clause/ Greater flexibility to switch jobs	3	1	3	2	1	3	1	1	4	5	4	1	1	8
Other	6	6	9	6	8	6	7	6	4	5	5	4	7	4
Don't know/ not sure	10	8	13	13	11	11	8	11	6	5	8	14	13	10

Base: Those who say salaries increasing in country of residence :Total (10,115), Algeria (554), Bahrain (97), Egypt (2695), Jordan (680), Kuwait (388), Lebanon (239), Morocco (360), Oman (136), Qatar (532), KSA (2234), Syria (95), Tunisia (229), UAE (1876)

Reasons for salaries not increasing

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

- Those who claim salaries are not increasing, cite the 'Poor economy' as the key reason.

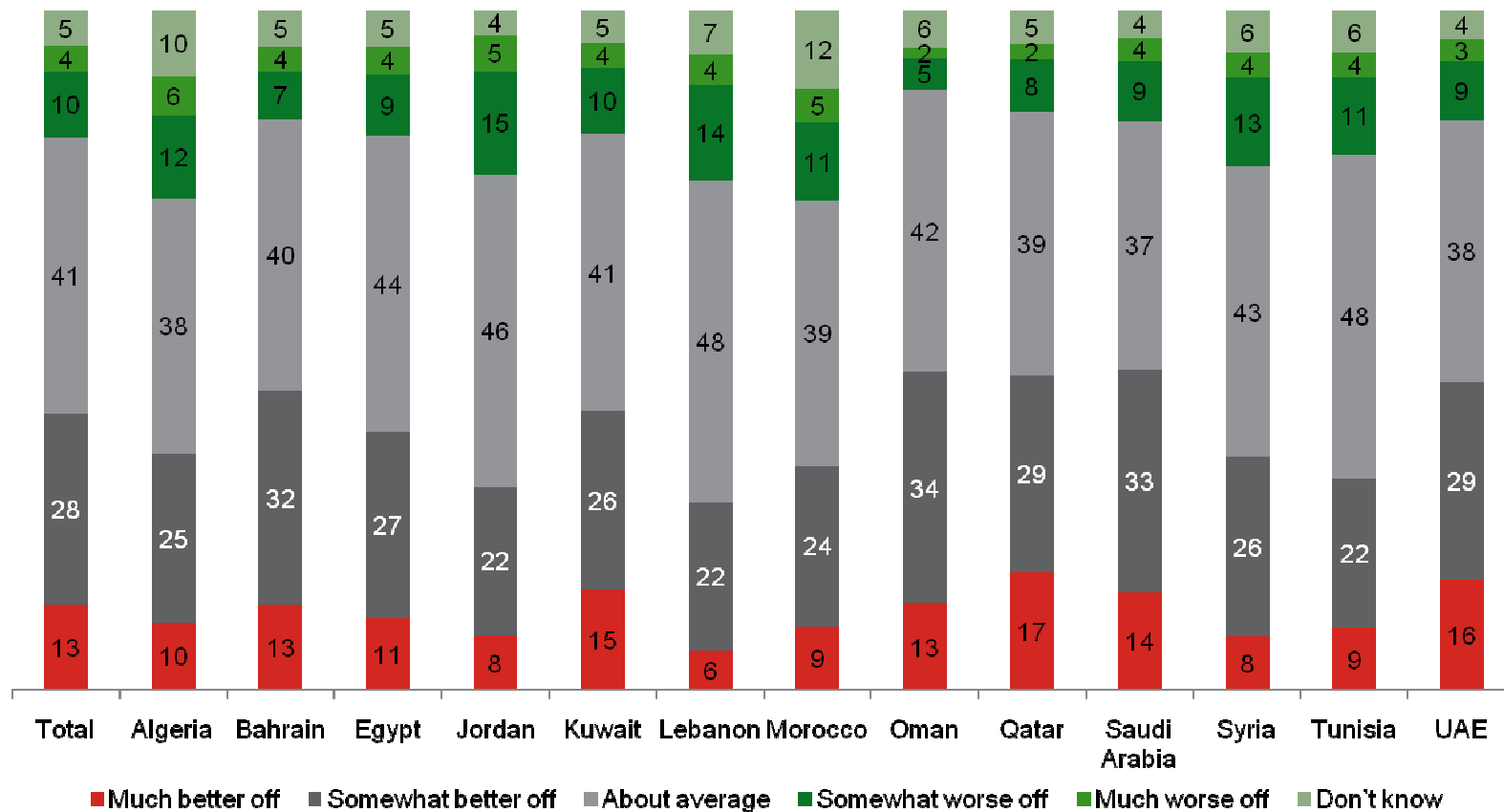
	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
Poor economy	40	20	58	53	54	19	59	26	11	31	22	50	41	34
Employer-friendly laws	26	32	9	31	29	26	23	44	18	18	33	20	28	14
Poor corporate performance/ profitability	21	19	34	23	26	25	24	18	25	19	17	17	19	20
Don't know/ not sure/ not applicable	19	31	11	15	12	26	14	17	27	21	22	26	12	22
More top talent than top jobs in local recruitment market today	17	10	13	14	21	21	16	24	14	11	19	9	17	19
Attractiveness of Middle Eastern countries as an employment market as compared to other countries	10	11	2	7	5	9	5	5	14	16	11	6	9	15
Tax-free environment of GCC countries	8	6	9	4	7	7	6	6	14	8	11	3	8	11
Developed infrastructure and modern lifestyle that the region offers	5	9	6	3	3	2	2	6	16	4	4	1	5	8

Base: Those who say salaries not increasing in country of residence :Total (4,666), Algeria (99), Bahrain (53), Egypt (1527), Jordan (355), Kuwait (184), Lebanon (116), Morocco (180), Oman (44), Qatar (143), KSA (674), Syria 139), Tunisia (111), UAE (1041)

 Quality of Life

Are you better or worse off?

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



Base: Total (16,067), Algeria (684), Bahrain (168), Egypt (4515), Jordan (1116), Kuwait (627), Lebanon (381), Morocco (604), Oman (197), Qatar (730), KSA (3155), Syria (251), Tunisia (363), UAE (3276)

Actions to improve quality of life

Q: Will quality of life considerations induce you to do any of the following in the next 12 months?

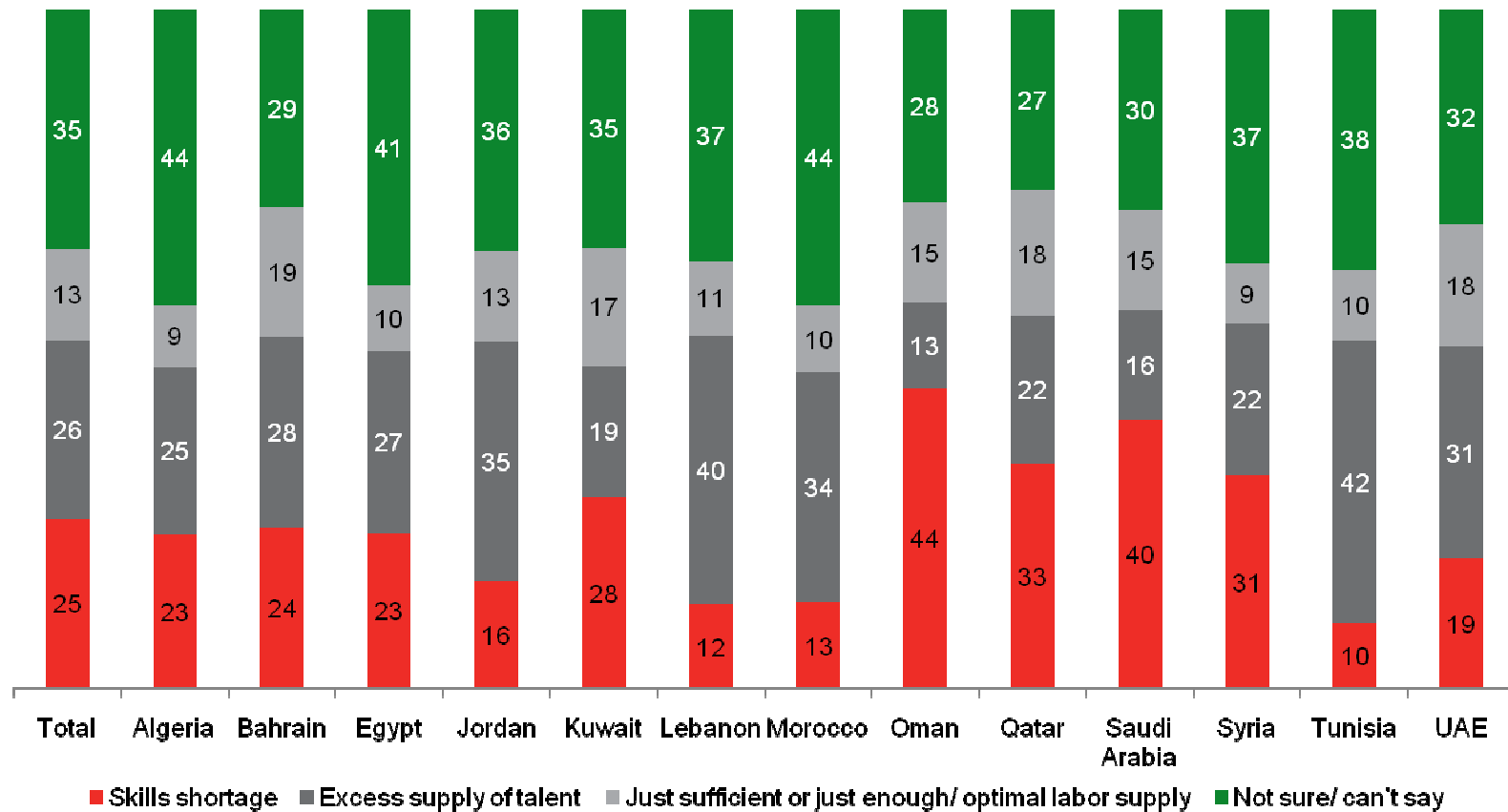
- Most would move to a higher paying industry.

	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
Look for a better job in same industry	52	32	53	51	46	56	46	43	49	51	57	42	40	57
Look for a better job as an expat in a different country in Middle East	31	57	36	38	42	21	33	32	31	28	24	49	50	17
Look for a better job in a different industry	27	22	29	23	26	30	31	29	24	24	28	16	18	35
Move to another region as an expat	10	16	18	9	17	8	8	14	12	11	9	16	15	9
Nothing/ None of these	10	8	10	10	10	9	15	12	16	11	11	6	9	10
Return to home country	4	1	4	1	0	9	1	1	10	9	8	1	1	7
Other	4	3	3	4	6	2	7	5	2	5	4	3	2	3

Base: Total (16,067), Algeria (684), Bahrain (168), Egypt (4515), Jordan (1116), Kuwait (627), Lebanon (381), Morocco (604), Oman (197), Qatar (730), KSA (3155), Syria (251), Tunisia (363), UAE (3276)

Skills/ labour supply status in country of residence

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



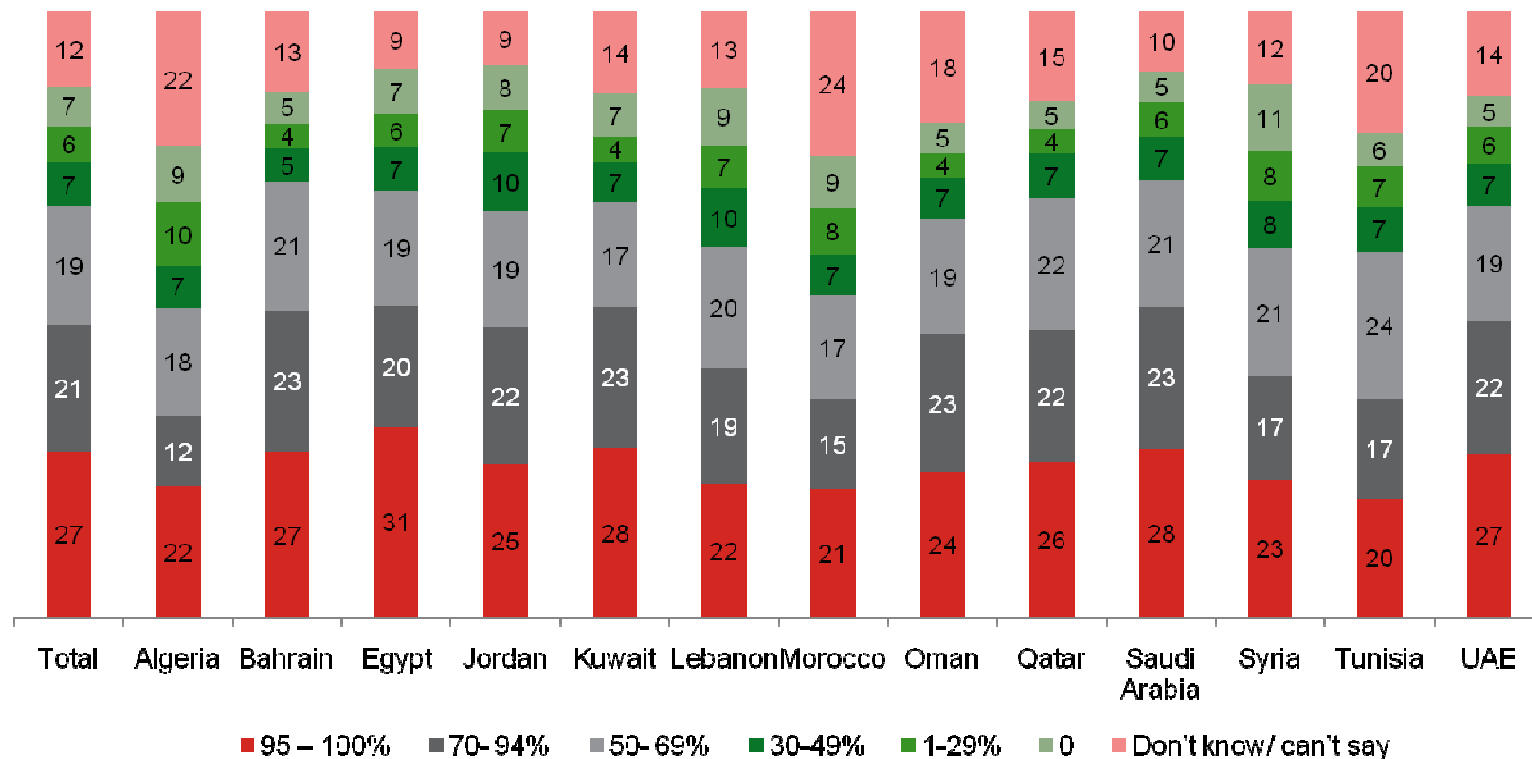
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Drivers of Loyalty

Loyalty towards the company linked to Salary

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

- Over a quarter feel that nearly their entire loyalty towards their organization is dependent on the salary they receive.



Base: Total (16,067), Algeria (684), Bahrain (168), Egypt (4515), Jordan (1116), Kuwait (627), Lebanon (381), Morocco (604), Oman (197), Qatar (730), KSA (3155), Syria (251), Tunisia (363), UAE (3276)

Loyalty towards the company linked to other Variables

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

- Apart from salary, 'Long term opportunities' and 'My line manger' are significant drivers of loyalty.

	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
Opportunities for long term career progression	34	25	35	34	40	30	40	25	35	35	36	36	31	34
My line manager	34	21	27	36	41	33	33	24	31	30	40	42	27	30
Senior management	30	19	30	34	32	29	28	16	33	26	36	29	17	26
My colleagues and the environment I work in	29	25	33	31	33	26	31	22	29	25	30	31	26	28
The nature of my daily responsibilities	25	21	35	24	27	23	26	23	32	27	25	23	22	26

Base: Total (16,067), Algeria (684), Bahrain (168), Egypt (4515), Jordan (1116), Kuwait (627), Lebanon (381), Morocco (604), Oman (197), Qatar (730), KSA (3155), Syria (251), Tunisia (363), UAE (3276)

^ Loyalty towards the company linked to other Variables

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

	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
Training and development opportunities	25	24	18	28	31	19	22	21	29	18	28	32	23	19
The company brand and reputation	23	17	30	22	21	24	29	15	29	25	25	22	17	27
Physical location of my workplace	15	16	18	16	17	9	19	15	13	9	16	15	13	14
Opportunities to travel	12	10	10	15	14	8	12	8	11	8	11	16	11	8
Other	5	6	3	5	7	6	5	6	2	6	5	6	4	5
None - I am primarily interested in pay	7	13	5	6	8	7	5	12	5	6	7	12	9	6
Don't know - can't say	8	11	7	6	5	10	8	11	7	11	7	6	10	9

Base: Total (16,067), Algeria (684), Bahrain (168), Egypt (4515), Jordan (1116), Kuwait (627), Lebanon (381), Morocco (604), Oman (197), Qatar (730), KSA (3155), Syria (251), Tunisia (363), UAE (3276)

 **Thank you**

