

2016

Research Report

Bayt.com Entrepreneurship

in the Middle East and North Africa



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About This Report

Stimulating entrepreneurship is intrinsic to creating both sustained economic value and jobs, and it is clear that this goal has become of increasing importance in the Middle East and North Africa (MENA) for creating stability and common prosperity, especially for the youth, with youth entrepreneurship being of particular importance.

Officially, one in four young people (aged 18-29) in the MENA region are unemployed. Unofficially, this number could be much higher, especially when considering the large prevalence of informal unemployment and underemployment in the region. With such diminished job prospects, an emphasis on youth entrepreneurship in the MENA is imperative. If young people cannot find jobs, they should be able to create their own, and ideally generate jobs for others.

In this report, Bayt.com and YouGov provide insights into the current level of understanding and interest in entrepreneurship across the MENA region. Some of the report's findings are already common knowledge among those who have started their own companies: stumbling blocks to growth for companies remain the same, including a lack of access to capital, an inability to communicate or connect with investors, and the need to find the right local partner in order to break into a market.

The key objectives of the study were to understand the following:

- Current work preferences and reasons for being self-employed vs. employed.
- Current level of entrepreneurship in the region.
- The perceived barriers to starting a business.
- The ease of setting up a business in country of residence.
- Perception of entrepreneurs in the region.

Research methodology:

In total, 715 respondents in the MENA region were interviewed for this report. All respondents were screened to ensure they were above 18 years of age.

Country of residence:

- GCC: UAE, KSA, other GCC (Kuwait, Oman, Qatar, Bahrain)
- Levant: Lebanon, Syria, Jordan
- North Africa: Egypt, Morocco, Algeria, Tunisia

Data collection and fieldwork:

All data was collected online amongst 715 respondents. Fieldwork was conducted between the 30th of May and the 24th of July 2016.

Key Findings

The findings show that more than two-thirds (71%) of respondents prefer to be self-employed, with this proportion being considerably lower in Morocco (59%). 'Personal fulfillment' (58%) and 'freedom to choose work-life balance' (41%) emerge as the top reasons for preferring to be self-employed. On the other hand, those who prefer to seek employment in a company, do so mostly to earn a regular income (44%) and to learn new skills (41%).

Of those who are self-employed, 75% of respondents have taken the first step to establish their own business in the last 6 years. 'Gaining greater independence in what they wanted to achieve' (39%), 'feeling the time was right' (34%), 'wanting to do what they love' (34%) and 'earning more income' (33%) arise at the top reasons for having started their own businesses.

6 in 10 are currently thinking of starting their own business, while 15% have already tried but failed, with financial related reasons being the main obstacle preventing them from doing so. This shows that although MENA residents have the entrepreneurial spirit, they may lack the financial resources to put them into action.

Just over a half of respondents claim that it was difficult to start a business in their country of residence with residents in the Levant region claiming that to the greatest extent. Residents in the UAE, Saudi Arabia and Algeria claim it to a lesser extent. A majority also believe that the government could better support entrepreneurs by easing the laws and regulations for setting up a business (60%).

When it comes to perceptions of entrepreneurship, Communications/ Information Technology (18%) and Advertising/Marketing/Public relations (17%) are considered to be the most appealing industries for entrepreneurship, followed by Hospitality and Leisure (14%), Architecture and Engineering (12%) and Finance/Insurance/Real estate (10%). According to respondents, procuring finances (56%) is the top concern while setting up a business.

With regards to the perceived image of entrepreneurs, respondents most strongly agree with the statements that 'entrepreneurs are opportunity-driven' and 'entrepreneurs help in creating new jobs'.

Finally, respondents largely claim that the most important 'key to success' for entrepreneurship is 'innovation'. Respondents from the UAE, however, think otherwise, with the largest proportion believing that "being close to clients or customers" is the most important key to success.

To conclude, being an entrepreneur is considered to be a favorable career by respondents in the MENA region where the majority are not self-employed and who aspire to become

entrepreneurs. However, there are several barriers and gaps, particularly related to finance, which are currently preventing them from setting up their own business.

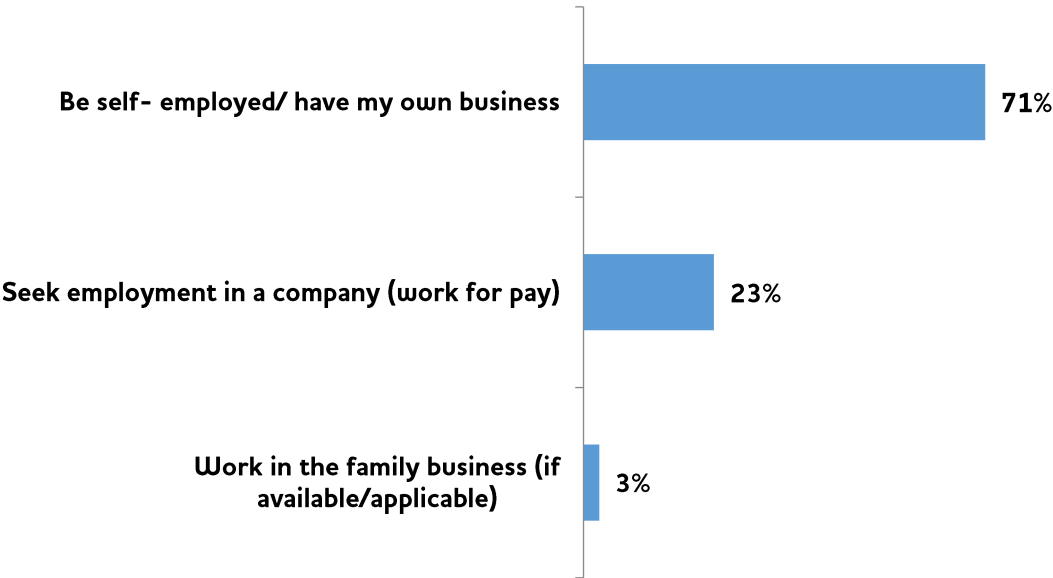


Research Findings

Work style preferences

When asked about their work style preferences, more than two-thirds (71%) of respondents claimed they would prefer to be self-employed. On the other hand, just 23% claimed they would prefer to seek employment in a company.

This proportion was considerably higher in Morocco at 35%, showing a greater interest in working for firms in the North African country.

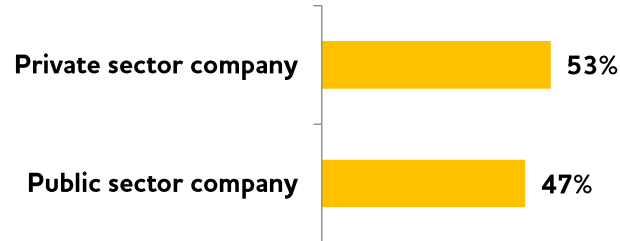


	GCC			Levant		North Africa		
	UAE	KSA	Other G.C.C	Jordan, Lebanon and Syria	Egypt	Morocco	Algeria	Tunisia
Base: All Respondents	128	128	92	55	144	54	84	30
Be self- employed/ have my own business	73%	73%	68%	76%	74%	59%	65%	77%
Seek employment in a company (work for pay)	23%	19%	23%	16%	22%	35%	29%	23%
Work in the family business (if available/applicable)	2%	2%	5%	5%	2%	4%	1%	-

Q: Given a choice what would you like to do? Please select one option from below. ; Base: 715

Choice of sector:

Of those who prefer to seek employment in a company, 53% state that they would prefer to work for the private sector.

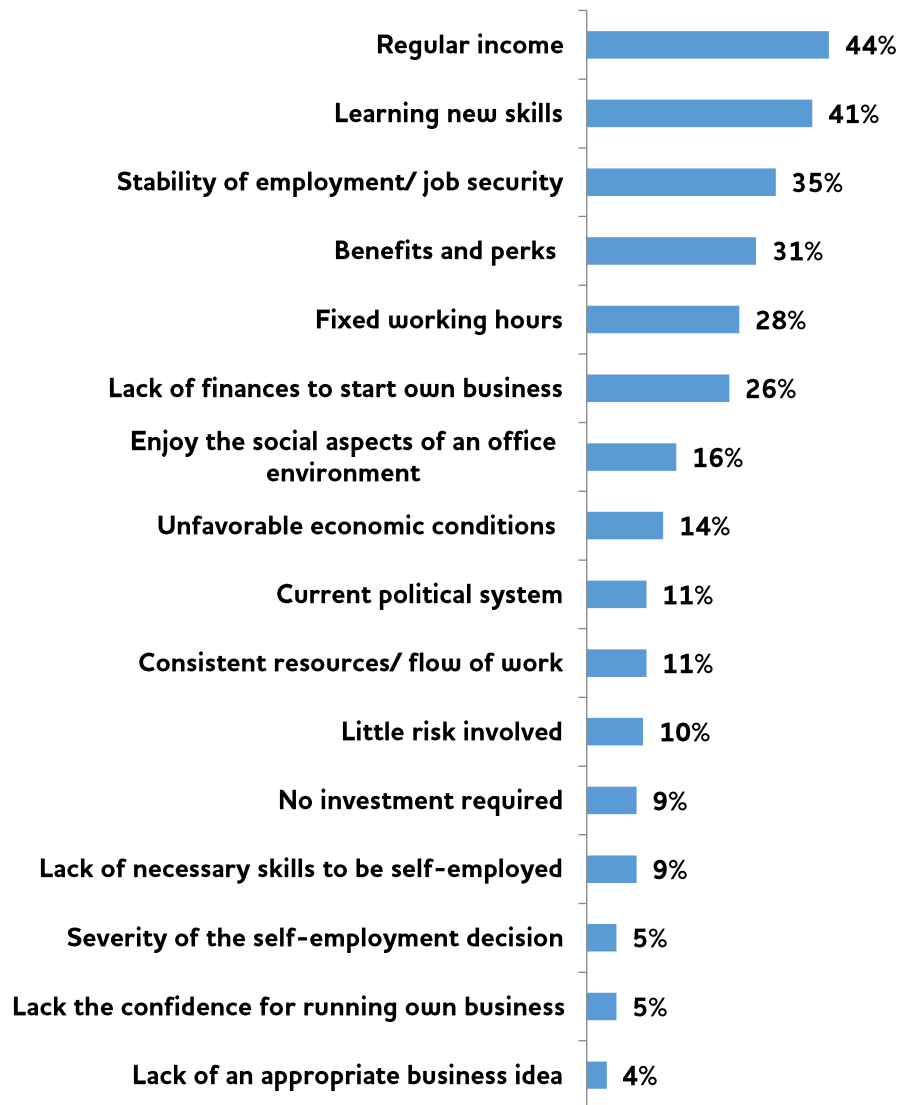


	GCC			Levant	North Africa			
	UAE	KSA	Other G.C.C	Jordan, Lebanon and Syria	Egypt	Morocco	Algeria	Tunisia
Base	29	24	23	9	32	19	25	7
Private sector company	45%	67%	57%	100%	47%	68%	28%	43%
Public sector company	55%	33%	43%	-	53%	32%	72%	57%

Q: Would you prefer to work for? Base (Those who prefer to 'Seek employment in a company (work for pay)'): 168

Reasons for preferring to 'seek employment in a company'

The top reasons why respondents prefer to seek employment in a company are 'regular income' (44%) and 'learning new skills' (41%). This is followed by 'employment stability' (35%), 'benefits and perks' (31%), 'fixed working hours' (28%) and 'lack of finances to start their own business' (26%).

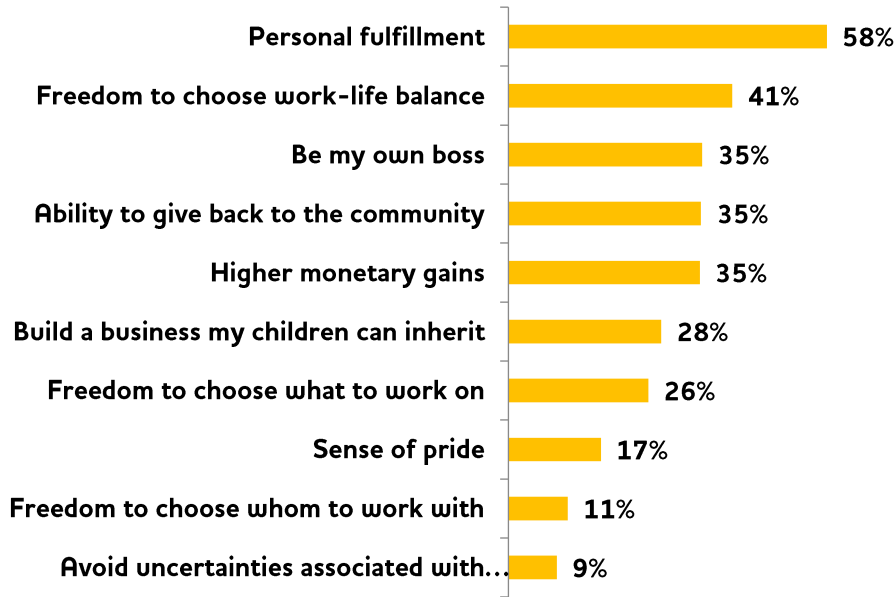


Q: Why do you say that you would prefer to 'Seek employment in a company (work for pay)'? (Select 3 responses only)
 Base (Those who prefer to 'seek employment in a company (work for pay)'): 165

Reasons for preferring to be self-employed

'Personal fulfillment' (58%) and 'freedom to choose work-life balance' (41%) emerge as the top reasons for preferring to be self-employed. 'Be my own boss', 'ability to give back to the community' and 'higher monetary gains' follow, all at 35%.

'Personal fulfillment' is even higher in Morocco (78%), while in the Levant, respondents place somewhat more emphasis on 'higher monetary gains' (52%).



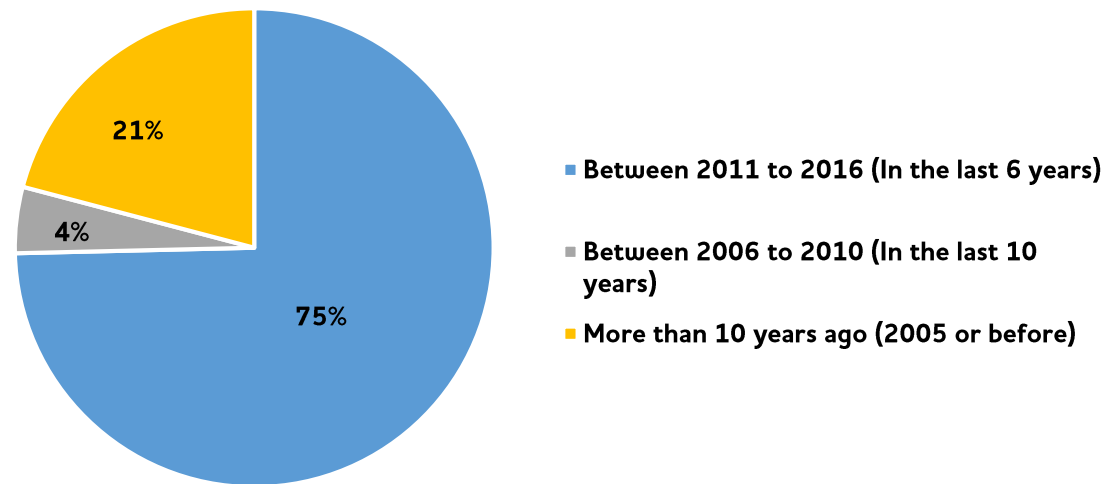
	GCC			Levant		North Africa		
	UAE	KSA	Other G.C.C	Jordan, Lebanon and Syria	Egypt	Morocco	Algeria	Tunisia
Base	94	93	63	42	107	32	55	23
Personal fulfillment	50%	56%	56%	62%	64%	78%	47%	70%
Freedom to choose work-life balance	46%	33%	40%	40%	34%	47%	51%	57%
Be my own boss	35%	34%	32%	33%	32%	38%	40%	57%
Ability to give back to the community	32%	44%	32%	31%	35%	28%	42%	26%
Higher monetary gains	33%	33%	46%	52%	36%	13%	33%	17%
Build a business my children can inherit	26%	25%	24%	36%	36%	22%	29%	17%
Freedom to choose what to work on	29%	31%	25%	12%	24%	41%	18%	17%
Sense of pride	17%	18%	16%	10%	18%	9%	22%	22%
Freedom to choose whom to work with	13%	13%	10%	5%	10%	19%	7%	9%
Avoid uncertainties associated with unemployment	16%	6%	14%	12%	5%	3%	5%	4%

Q: Why do you say that you would prefer to 'Be self- employed/ have my own businesses'? (Select 3 responses only)
 Base (Those who prefer to 'be self- employed/ have their own business'): 509

State of self-employment

Age of business (for those who are self-employed)

Of those who are self-employed, three-quarters of respondents took the first step to establish their business in the last 6 years.



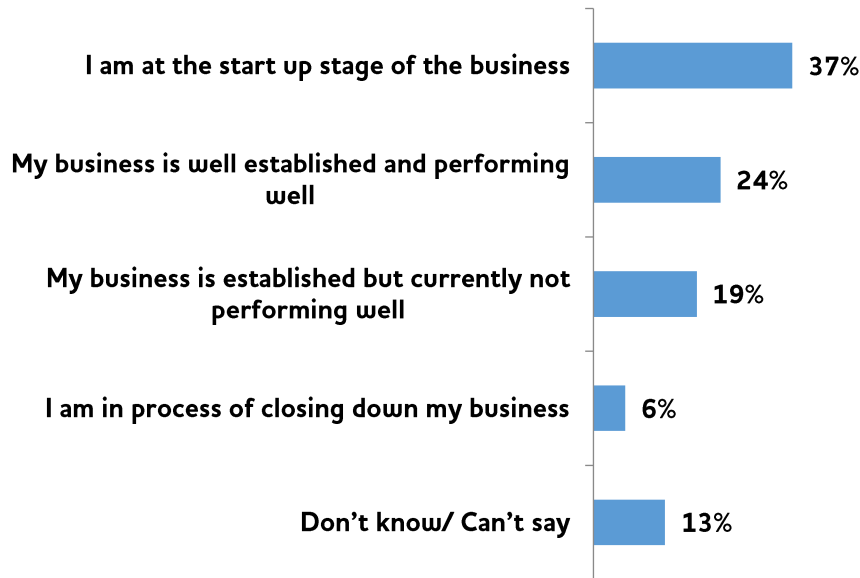
Q: You said you are self-employed / have your own business. When did you take the first step to establish it?

Base (Those who are self-employed): 67*

*Region-wise breakdown not shown due to small base sizes (base sizes below 30)

Current stage of business (those who are self-employed)

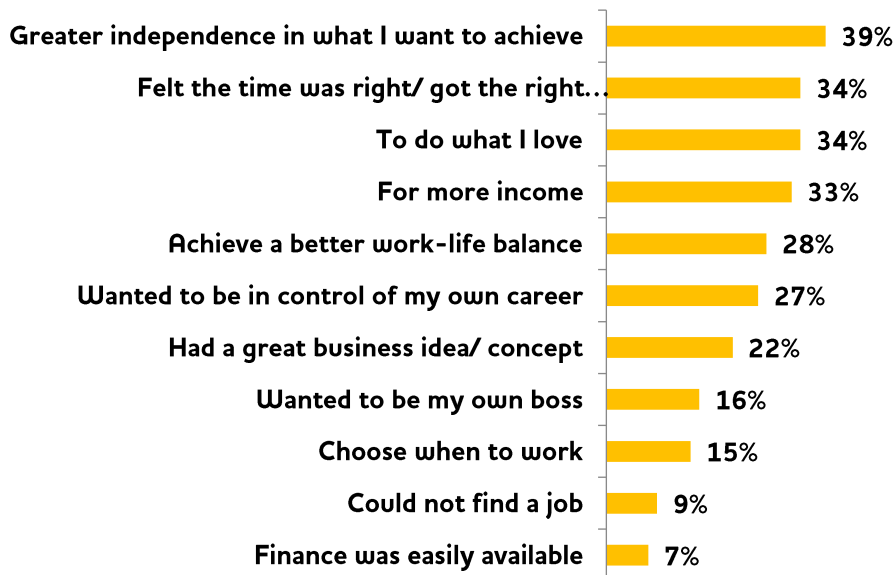
When it comes to the current stage of their business, just over a third of self-employed respondents are at the start-up stage of the business (37%), while approximately a quarter claim that their business is established and performing well (24%). On the other hand, almost a fifth say their business is established but not performing well.



Q: Which of the following best applies to the business you have established, Base (Those who are self-employed): 67*
 *Region-wise breakdown not shown due to small base sizes (base sizes below 30)

Reason for starting own business (those who are self-employed)

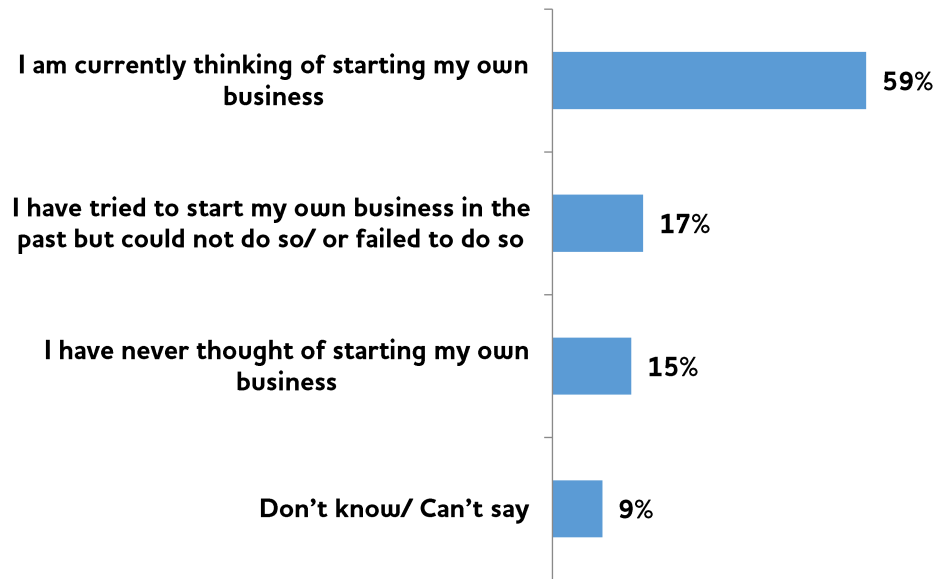
'Gaining greater independence in what they wanted to achieve' (39%), 'feeling the time was right' (34%), 'wanting to do what they love' (34%) and 'for more income' (33%) arise at the top reasons for having started their own business.



Q: Why did you decide to start your own business in the first instance? Base (All those who are self-employed): 67*
 *Region-wise breakdown not shown due to small base sizes (base sizes below 30)

Attempt to start own business (those who are currently employed)

When it comes to those who are currently employed, almost 6 in 10 are currently thinking of starting their own business. 17% of respondents have tried to start their own business but have failed, while 15% never thought of starting their own business.

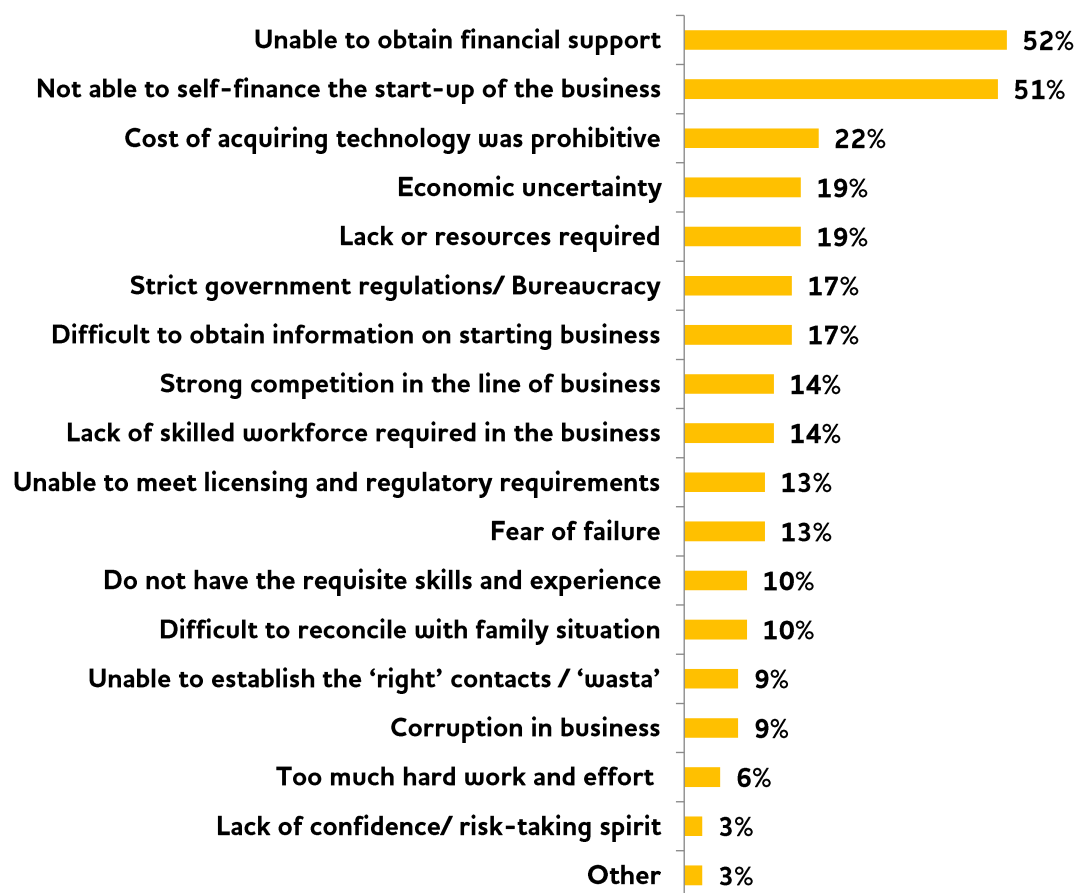


	GCC			Levant		North Africa		
	UAE	KSA	Other G.C.C	Jordan, Lebanon and Syria	Egypt	Morocco	Algeria	Tunisia
Base	87	78	61	28	83	18	37	14
I am currently thinking of starting my own business	68%	64%	59%	61%	48%	50%	49%	71%
I have tried to start my own business in the past but could not do so/ or failed to do so	11%	17%	20%	18%	23%	11%	22%	-
I have never thought of starting my own business	11%	14%	10%	11%	20%	33%	14%	14%
Don't know/ Can't say	9%	5%	11%	11%	8%	6%	16%	14%

Q: Which of the following best describes you with regards to starting your own business?
 Base (Those who are employed in the public or private sector): 406

Challenges faced in starting a business (those who tried but couldn't/ failed to do so)

Of those who had tried to start a business in the past, financial-related obstacles were the main reasons preventing them from doing so. 1 in 2 were unable to obtain financial support, while another half were not able to self-finance the start-up of the business.



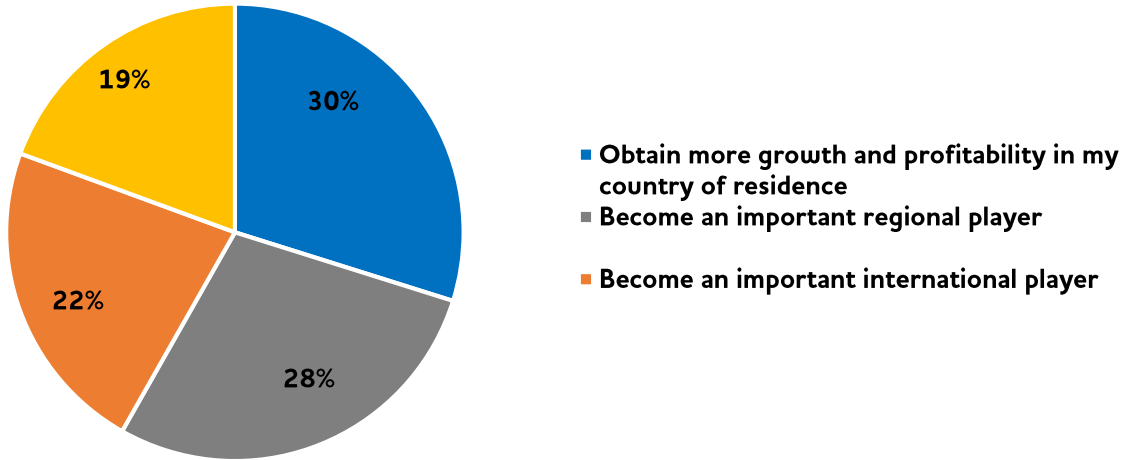
Q: Given below are some reasons that people have identified which could prevent one from starting one's own business. Which of these prevented you from starting your own business?

Base (Those who tried to start a business in the past but could not do so): 69*

*Region-wise breakdown not shown due to small base sizes (base sizes below 30)

Business ambitions (those who are self-employed)

When it comes to future business ambitions, 30% of self-employed respondents want to obtain more growth and profitability in their country of residence, while 28% want their business to become an important regional player. The remainder of respondents want to become an important international player (22%) or a major international group (19%).



Q: Which of the following best describes your personal ambition for your business and future growth?

Base (Those who are self-employed): 67*

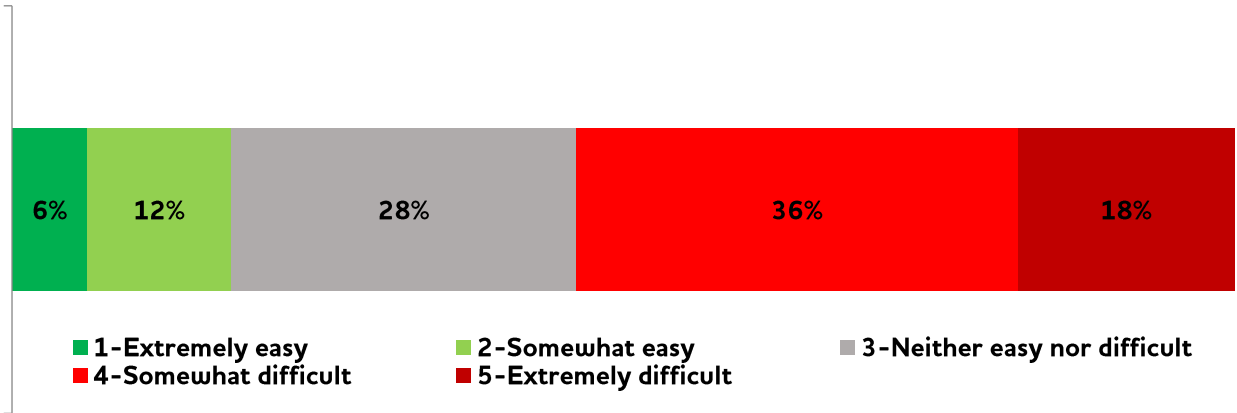
*Region-wise breakdown not shown due to small base sizes (base sizes below 30)

Entrepreneurship in Country of Residence

Ease of setting up own business

Just over half claimed it was difficult to start a business in their country of residence (54%).

Respondents in the Levant believe that to the greatest extent (67%) while respondents in the UAE (48%), Saudi Arabia (47%) and Algeria (50%) believe that the difficulty is relatively lower, when compared to other countries in the Middle East and North Africa.



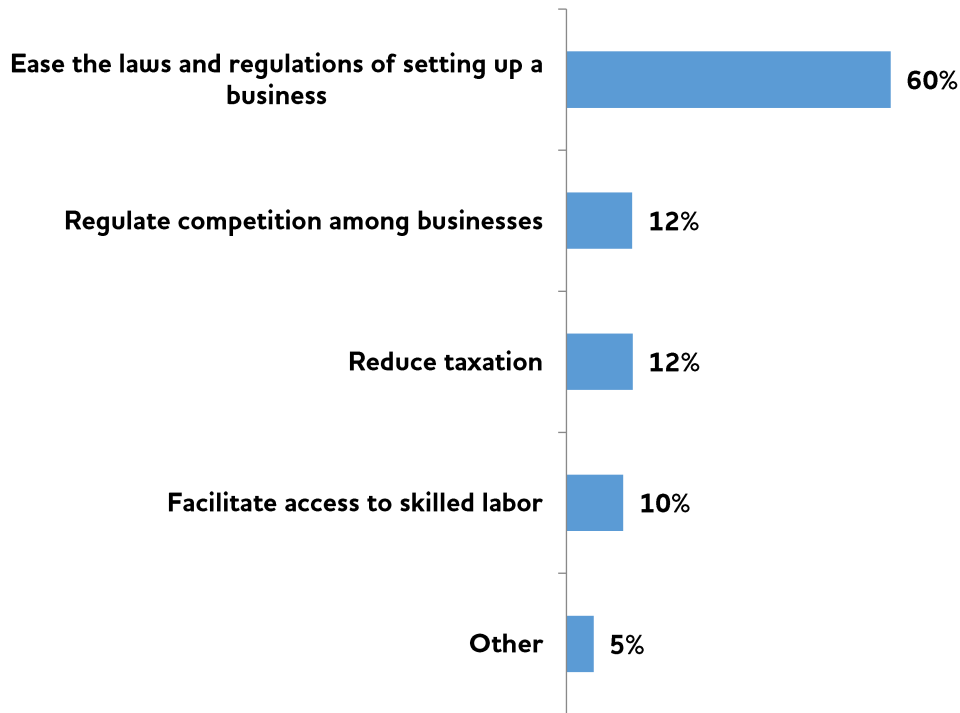
	GCC			Levant		North Africa		
	UAE	KSA	Other G.C.C	Jordan, Lebanon and Syria	Egypt	Morocco	Algeria	Tunisia
Base	128	128	92	55	144	54	84	30
1-Extremely easy	6%	13%	7%	2%	3%	2%	7%	3%
2-Somewhat easy	12%	10%	12%	7%	14%	17%	11%	10%
3-Neither easy nor difficult	34%	30%	27%	24%	24%	20%	32%	30%
4-Somewhat difficult	34%	29%	34%	53%	42%	35%	32%	33%
5-Extremely difficult	13%	18%	21%	15%	17%	26%	18%	23%

Q: How easy/ difficult would you say it is to start your own business in the country you currently live in?
Base: 715

Government support for entrepreneurs

The majority of respondents believe that the government could better support entrepreneurs by easing the laws and regulations for setting up a business (60%).

Reducing taxation is echoed more strongly in Morocco (33%) and in Levant (22%).



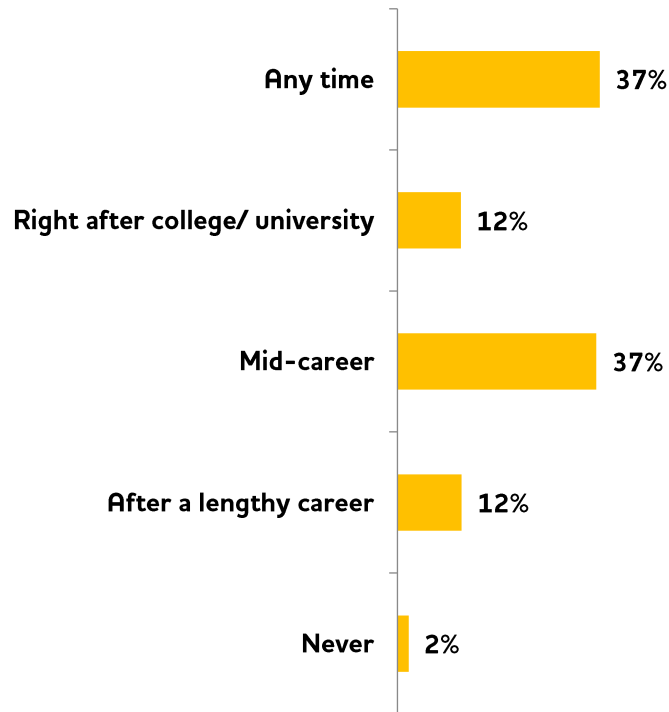
	GCC			Levant		North Africa		
	UAE	KSA	Other G.C.C	Jordan, Lebanon and Syria	Egypt	Morocco	Algeria	Tunisia
Base	128	128	92	55	144	54	84	30
Ease the laws and regulations of setting up a business	63%	61%	67%	44%	65%	43%	54%	73%
Regulate competition among businesses	11%	13%	5%	16%	14%	15%	14%	10%
Reduce taxation	11%	8%	5%	22%	8%	33%	17%	10%
Facilitate access to skilled labor	12%	15%	15%	11%	7%	4%	10%	3%
Other	3%	4%	7%	7%	6%	6%	6%	3%

Q: How do you think governments could better support entrepreneurs? Base: 715

Perception of Entrepreneurship

Best time to start a business

According to respondents, the best time to start a business, appears to be any time (37%) or mid-career (37%).



	GCC			Levant	North Africa			
	UAE	KSA	Other G.C.C	Jordan, Lebanon and Syria	Egypt	Morocco	Algeria	Tunisia
Base	128	128	92	55	144	54	84	30
Any time	40%	42%	40%	31%	34%	31%	36%	43%
Right after college/ university	5%	9%	10%	11%	10%	19%	26%	10%
Mid-career	45%	40%	35%	44%	31%	39%	29%	33%
After a lengthy career	9%	5%	12%	13%	22%	11%	8%	13%
Never	1%	4%	3%	2%	3%	-	1%	-

Q: In your opinion, when is it the best time to start one's own business? Base: 715

Advice to aspiring entrepreneurs

'Not being afraid of failure' (42%) is by far the best advice to aspiring entrepreneurs.

Having a great business plan is considered somewhat more important according to residents from GCC countries, including Bahrain, Kuwait, Oman and Qatar, as it is the second-most important piece of advice chosen by them (20%).



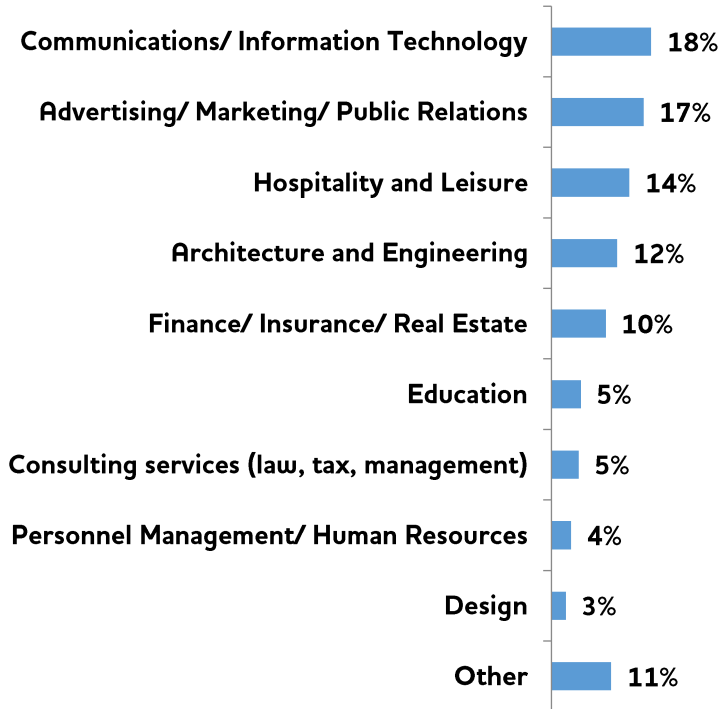
	GCC			Levant		North Africa		
	UAE	KSA	Other G.C.C	Jordan, Lebanon and Syria	Egypt	Morocco	Algeria	Tunisia
Base	128	128	92	55	144	54	84	30
Don't be afraid of failure	44%	41%	46%	42%	33%	43%	48%	43%
Do an extensive amount of market research	15%	9%	12%	9%	17%	17%	5%	13%
Have a great business plan	10%	16%	20%	11%	8%	9%	7%	7%
Have a great marketing plan	10%	9%	7%	7%	13%	7%	8%	7%
Have a great founding team	6%	7%	4%	13%	7%	11%	13%	-
Have a great business idea	7%	8%	5%	4%	9%	6%	6%	13%
Have plenty of financing	4%	4%	4%	9%	7%	4%	10%	3%
Have a concrete exit strategy	2%	5%	-	-	3%	4%	2%	10%

Q: What do you think is the single-best advice to an aspiring entrepreneur?; Base: 715

Most appealing industry for entrepreneurship

The most appealing industries for entrepreneurship are considered to be Communications/ Information Technology (18%) and Advertising/Marketing/Public relations (17%), followed by Hospitality and Leisure (14%), Architecture and Engineering (12%) and Finance/Insurance/Real Estate (10%).

Communications/Information Technology is seen as a somewhat less appealing industry in the UAE (12%) and in the other GCC countries (8%).



	GCC			Levant		North Africa		
	UAE	KSA	Other G.C.C	Jordan, Lebanon and Syria	Egypt	Morocco	Algeria	Tunisia
Base	128	128	92	55	144	54	84	30
Communications/ Information Technology	12%	23%	8%	24%	24%	19%	19%	23%
Advertising/ Marketing/ Public Relations	13%	18%	23%	25%	15%	22%	13%	13%
Hospitality and Leisure	19%	13%	13%	20%	15%	13%	7%	17%
Architecture and Engineering	13%	11%	14%	5%	13%	7%	17%	13%
Finance/ Insurance/ Real Estate	11%	10%	8%	4%	12%	13%	10%	13%
Education	6%	2%	5%	2%	5%	9%	10%	7%

Consulting services (law, tax, management)	5%	3%	9%	7%	3%	7%	6%	3%
Personnel Management/ Human Resources	4%	5%	3%	-	4%	4%	4%	3%
Design	3%	3%	3%	4%	1%	4%	2%	3%
Other	16%	12%	14%	9%	9%	2%	13%	3%

Q: Which industry in your country of residence do you think is most appealing for entrepreneurship; Base: 715

Top concerns while setting up a business

While thinking about setting up their own business, the top concerns amongst respondents would be procuring finances to start (56%), followed by hiring the wrong people (41%) and the uncertainty of profit/ income (35%).

Compared to other regions, hiring the wrong people is a higher concern in Algeria (58%) and Morocco (61%). Uncertainty of profit/ income is the biggest concern in the UAE (54%).

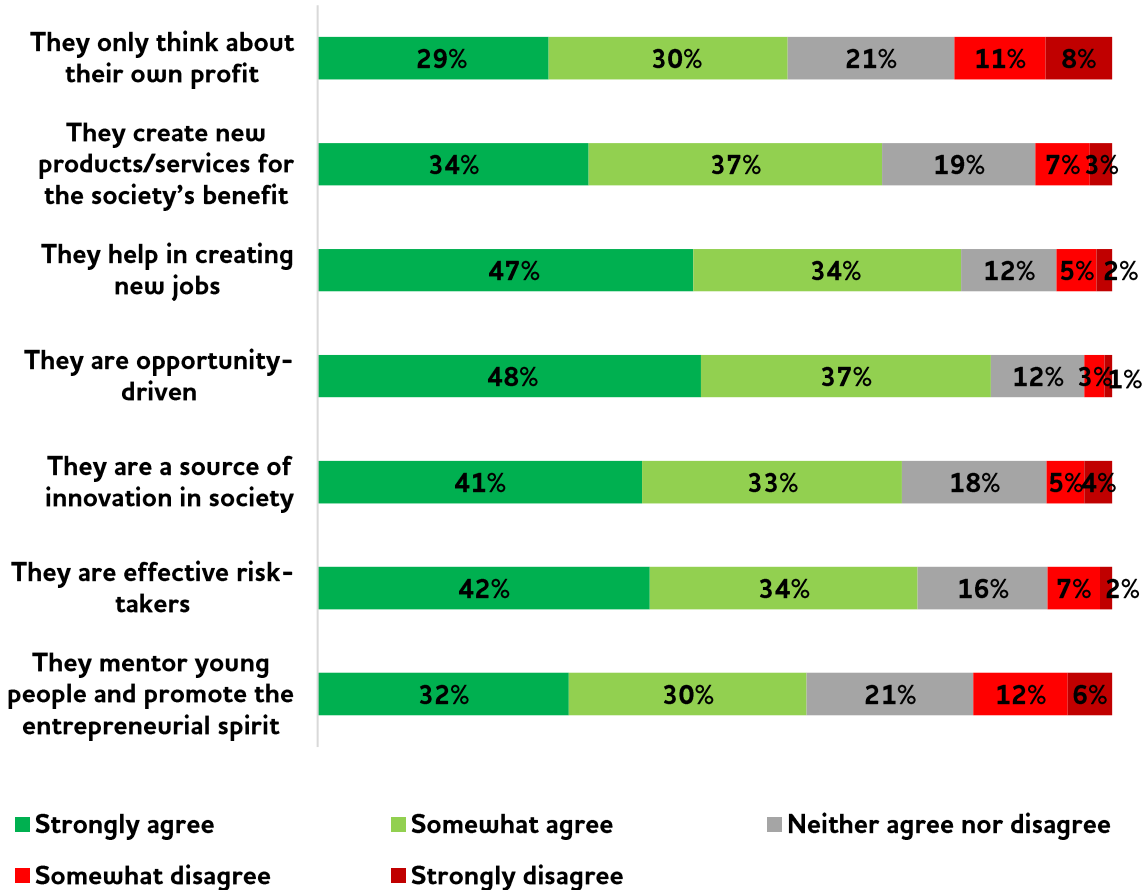


	GCC			Levant	North Africa			
	UAE	KSA	Other G.C.C	Jordan, Lebanon and Syria	Egypt	Morocco	Algeria	Tunisia
Base	128	128	92	55	144	54	84	30
Procuring finances to start	48%	52%	57%	60%	58%	59%	57%	77%
Hiring the wrong people	32%	41%	29%	45%	38%	61%	58%	37%
Uncertainty of profit/income	54%	29%	43%	45%	28%	20%	23%	20%
Making a loss	23%	30%	21%	25%	42%	31%	36%	30%
Need to put in a lot of time, energy and effort	30%	35%	41%	22%	26%	26%	23%	23%
Need to establish the 'right' contacts/ 'wasta'	33%	25%	32%	33%	26%	22%	29%	37%
Business idea not being accepted in the marketplace	27%	27%	21%	31%	28%	17%	23%	33%
Lack of good advice and mentorship	24%	20%	24%	16%	26%	35%	32%	23%
Failure to comply with legislation, regulation and/or standards	17%	17%	16%	4%	17%	19%	15%	7%
Finding the correct insurance cover	9%	20%	11%	13%	10%	7%	4%	10%

Q: Imagine if you were to set up your own business today in the country you live in, what are the top 3 things that you would be most concerned about? Base: 715

Perceived image of entrepreneurs

When it comes to their perception of entrepreneurs, respondents most strongly agreed with the statements 'they are opportunity-driven' (48%) and 'they help in creating new jobs' (47%).



	GCC			Levant		North Africa		
	UAE	KSA	Other G.C.C	Jordan, Lebanon and Syria	Egypt	Morocco	Algeria	Tunisia
Base	128	128	92	55	144	54	84	30
They only think about their own profit								
Strongly agree	20%	31%	27%	33%	31%	37%	35%	20%
Somewhat agree	35%	22%	33%	40%	31%	22%	26%	40%
Neither agree nor disagree	23%	23%	23%	24%	18%	20%	15%	23%
Somewhat disagree	14%	13%	12%	2%	12%	11%	10%	17%
Strongly disagree	8%	11%	5%	2%	9%	9%	14%	-
They create new products/ services for the society's benefit								
Strongly agree	30%	37%	32%	25%	38%	37%	36%	40%

Somewhat agree	43%	37%	42%	36%	33%	31%	37%	27%
Neither agree nor disagree	22%	16%	17%	29%	19%	17%	14%	30%
Somewhat disagree	5%	7%	4%	9%	7%	13%	8%	3%
Strongly disagree	1%	4%	4%	-	3%	2%	5%	-
They help in creating new jobs								
Strongly agree	48%	44%	48%	38%	47%	59%	49%	53%
Somewhat agree	40%	31%	37%	35%	35%	28%	26%	30%
Neither agree nor disagree	9%	13%	12%	15%	12%	9%	15%	13%
Somewhat disagree	3%	9%	3%	11%	3%	2%	7%	3%
Strongly disagree	-	4%	-	2%	3%	2%	2%	-
They are opportunity-driven								
Strongly agree	45%	45%	46%	49%	53%	59%	51%	33%
Somewhat agree	46%	38%	35%	36%	32%	30%	27%	53%
Neither agree nor disagree	6%	11%	17%	15%	10%	11%	18%	10%
Somewhat disagree	3%	2%	2%	-	3%	-	4%	3%
Strongly disagree	-	3%	-	-	2%	-	-	-
They are a source of innovation in society								
Strongly agree	45%	42%	40%	49%	40%	33%	33%	47%
Somewhat agree	35%	33%	34%	33%	35%	30%	26%	33%
Neither agree nor disagree	16%	16%	21%	15%	13%	28%	26%	17%
Somewhat disagree	2%	4%	4%	4%	6%	4%	11%	3%
Strongly disagree	2%	5%	1%	-	7%	6%	4%	-
They are effective risk-takers								
Strongly agree	44%	30%	47%	40%	49%	37%	36%	60%
Somewhat agree	38%	38%	28%	38%	31%	31%	36%	20%
Neither agree nor disagree	14%	17%	16%	15%	15%	26%	17%	17%
Somewhat disagree	3%	13%	7%	5%	3%	6%	10%	3%
Strongly disagree	1%	2%	2%	2%	2%	-	2%	-
They mentor young people and promote the entrepreneurial spirit								
Strongly agree	27%	34%	34%	25%	35%	28%	31%	37%
Somewhat agree	35%	30%	33%	33%	26%	39%	21%	23%
Neither agree nor disagree	25%	24%	17%	24%	19%	19%	17%	20%
Somewhat disagree	9%	8%	11%	16%	13%	11%	18%	13%
Strongly disagree	3%	4%	5%	2%	7%	4%	13%	7%

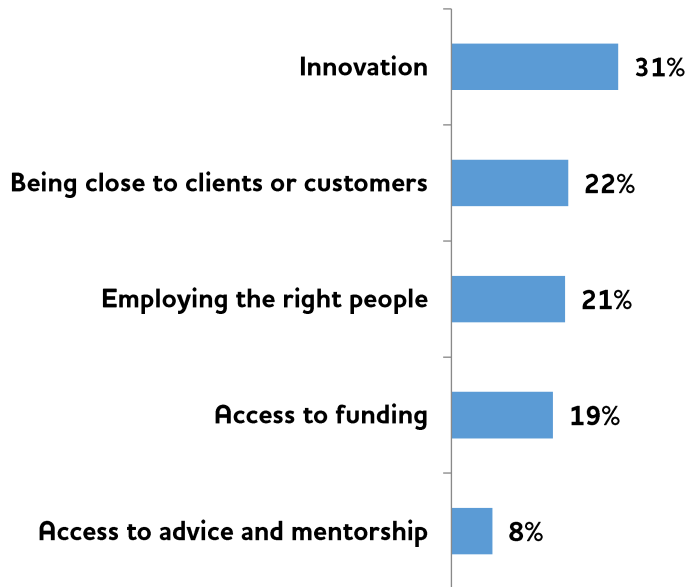
Q: Could you please tell us to what extent you agree or disagree with the following statements related to entrepreneurs?

Base: 715

The key to success as an entrepreneur

Close to a third of respondents believe that 'innovation' is the key to success as an entrepreneur, followed by 'being close to clients or customers' (22%) and 'employing the right people' (21%).

Respondents in the UAE rated being close to clients or customers as the most important 'key to success' (37%).

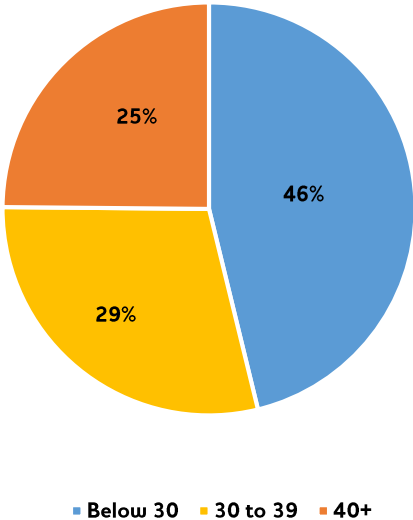


	GCC			Levant		North Africa		
	UAE	KSA	Other G.C.C	Jordan, Lebanon and Syria	Egypt	Morocco	Algeria	Tunisia
Base	128	128	92	55	144	54	84	30
Innovation	18%	30%	26%	29%	47%	31%	31%	30%
Being close to clients or customers	37%	21%	26%	29%	11%	22%	11%	10%
Employing the right people	23%	22%	21%	13%	22%	13%	27%	17%
Access to funding	14%	17%	20%	22%	14%	24%	23%	40%
Access to advice and mentorship	8%	10%	8%	7%	6%	9%	6%	3%

Q: In your opinion, what is the "key to success" as an entrepreneur? ; Base: 715

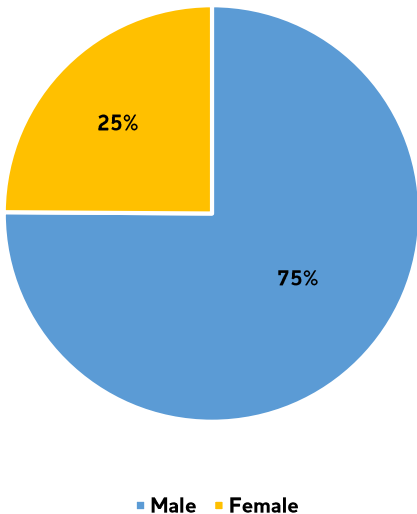
Demographics

Age group



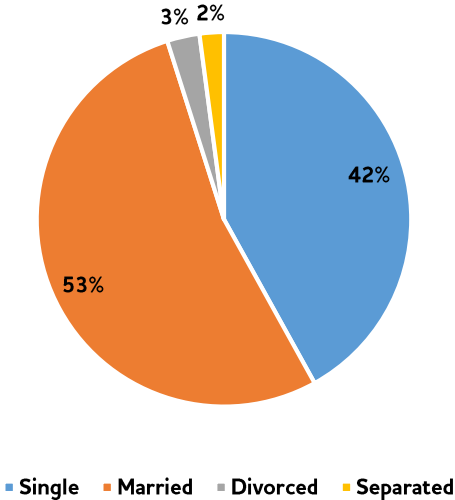
Base: 715

Gender



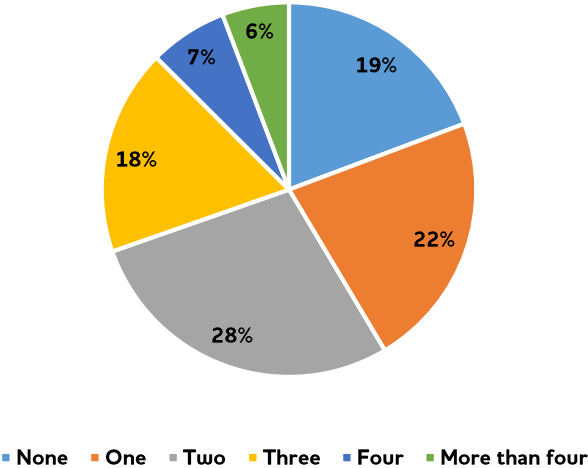
Base: 715

Marital status



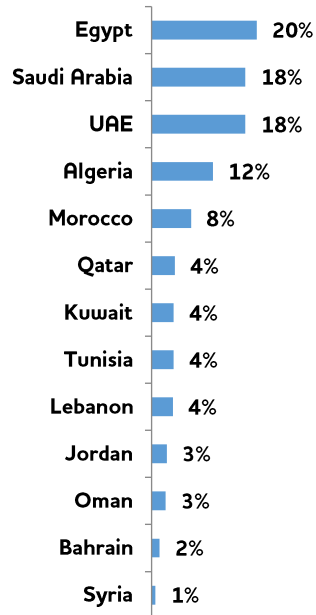
Base: 715

Number of children



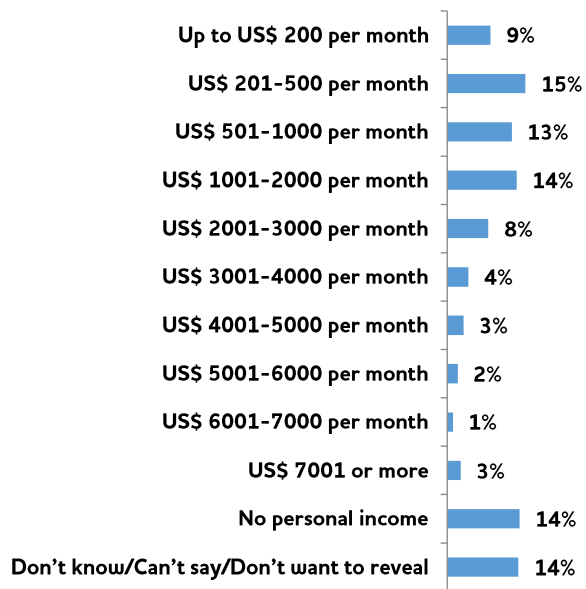
Base (Those who are married/ separated/ divorced): 415

Country of residence



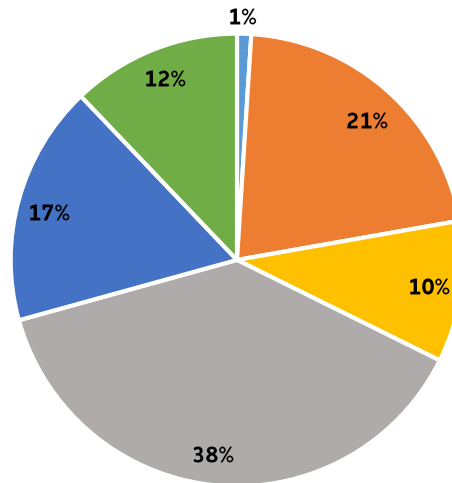
Base: 715

Monthly personal income



Base: 715

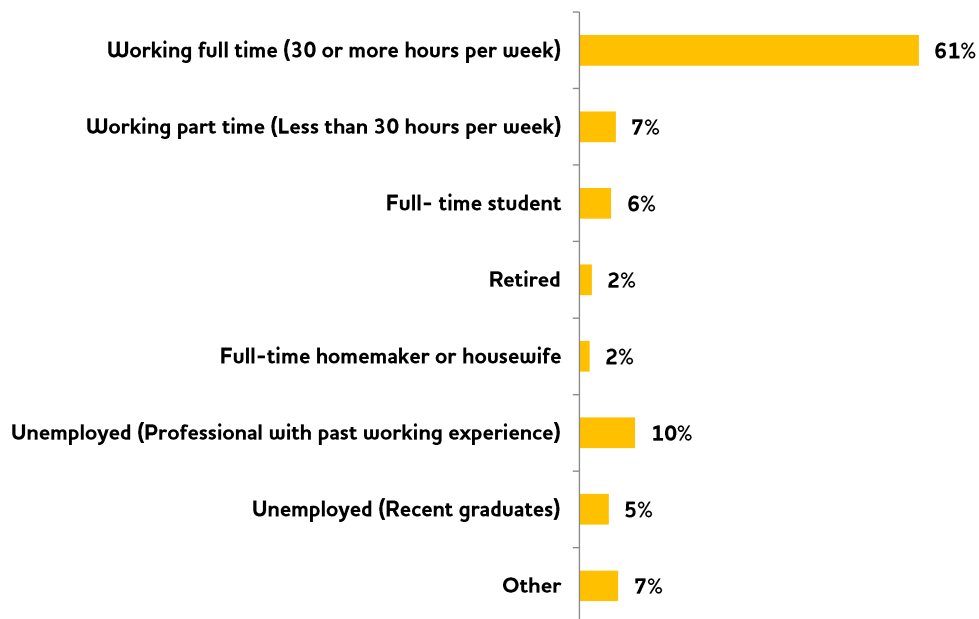
Highest level of education



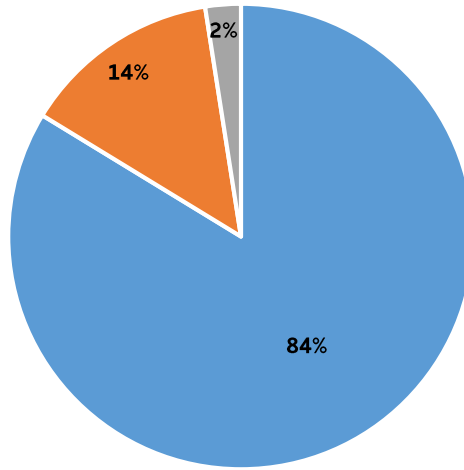
- Elementary school
- Secondary school
- Vocational college education (e.g. to qualify as an electrician, nurse, etc.)
- University first degree (e.g. BA, BSc)
- University higher degree (Masters, MBA, PhD)
- Professional higher education (to qualify as an engineer, doctor, lawyer etc.)

Base: 715

Current employment status



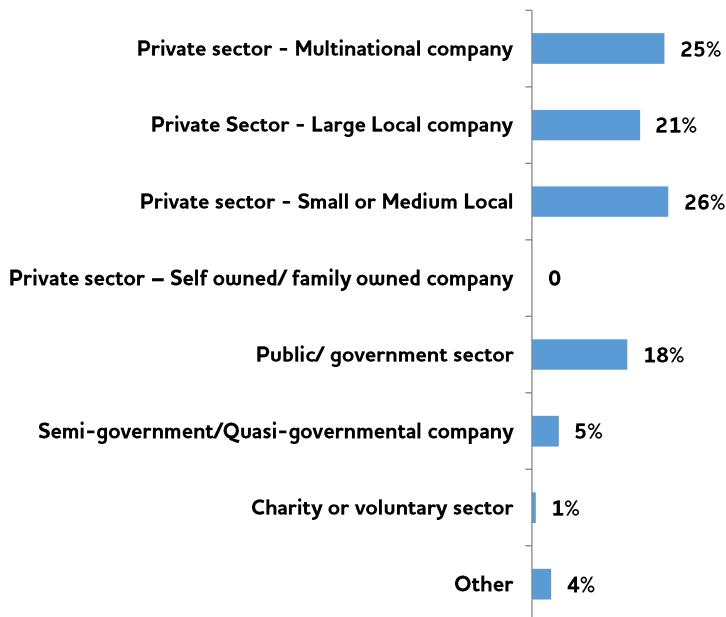
Base: 715



- Employed in the public/ or private sector
- Self-employed/ have my own business
- Work in family business

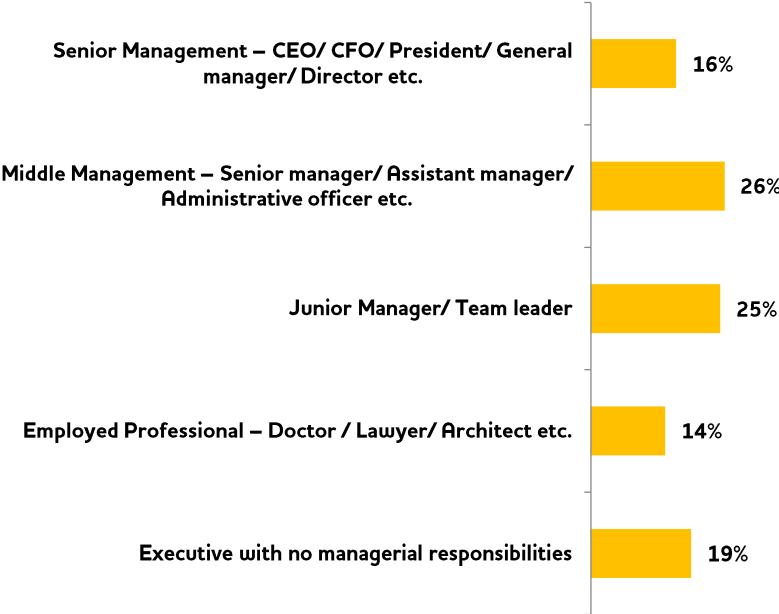
Base (Those who are working full-time or part-time): 485

Work sector



Base (Those employed in the public or private sector): 406

Level of seniority at work



Base (Those who are working full-time or part-time): 485