

# EMPLOYEE LOYALTY

March 31, 2008

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## Objective

- ✓ To understand perceptions and attitudes of Middle Eastern employees regarding their career, the work they do and the organization they work for.
- ✓ The findings will be used to analyse what this means for employers at large and compare levels of satisfaction with the employment market across countries in the region.

## Project Background

“An organization bound by love is more powerful than one bound by fear” Herb Kelleher, CEO, Southwest Airlines.

- ✓ With the economy improving, and more opportunities opening up, the temptation to transition to new opportunities could become strong. What safety nets do organizations have in place to prevent workers from straying?
- ✓ Keeping the lines of communication open and promoting a culture of mutual respect and loyalty could be the glue that reduces turnover and helps keeps the workforce in place.
- ✓ Employee loyalty is a measure of the well being of the job market and hence the economic condition within a country.
- ✓ If employees are happy with their work environment, it will in turn affect their loyalty & productivity.
- ✓ This will translate into stability, productivity & economic growth for the organization and the country as a whole.
- ✓ This information is useful for professionals, organizations, business people, recruitment consultants/agencies and the general public

## Executive Summary

- ✓ Post war Lebanon & developing nation Pakistan came out really strongly as places where the employment market is now at its peak. Good scores on categories such as professional working environment, good management, scope of career recognition & enhancement, infrastructure and job security to name a few... mean that these countries should be closely watched as employee satisfaction is linked to a boom in the economy.
- ✓ Pakistan reported the highest loyalty & long term retention rates.
- ✓ KSA achieved the lowest scores on many of the above factors. This indicates its attractiveness as a job market may be waning.
- ✓ Bahrain showed substantially lower satisfaction & loyalty levels to the organization. KSA was the second lowest amongst GCC countries.
- ✓ These two countries were even low on satisfaction & loyalty to the actual job and line of work.

## Executive Summary

- ✔ What came out very strongly is that an employee's satisfaction and loyalty to their work and organization have a strong impact on their perceptions of the management, training and recognition, performance measurement, team work and working environment to name a few.
- ✔ This in turn will lead to longer retention, stable environments for organizations and the country as a whole.
- ✔ Given this, employers should try to work towards greater levels of satisfaction and loyalty by working on each of these individual factors.
- ✔ Given a good working environment and enough career enhancement opportunities, employees may not even be looking for a company that pays them top dollar.

## What this means for the UAE

- ✔ The UAE scored slightly lower than the average on satisfaction and loyalty to job and organisation.
- ✔ UAE supported the lowest agreement levels on motivation, commitment to the organisation and work-life balance.
- ✔ As a primarily expat job market, the UAE should be aware of these factors - if they are to continue to remain competitive against the economies from where they currently attract talent.

## Respondent profile

### Age and Gender:

Adult males and females  
Aged 20-62 years

### Nationalities

Local  
Arab Expats  
Western Expats  
Asians

### Country of Residence

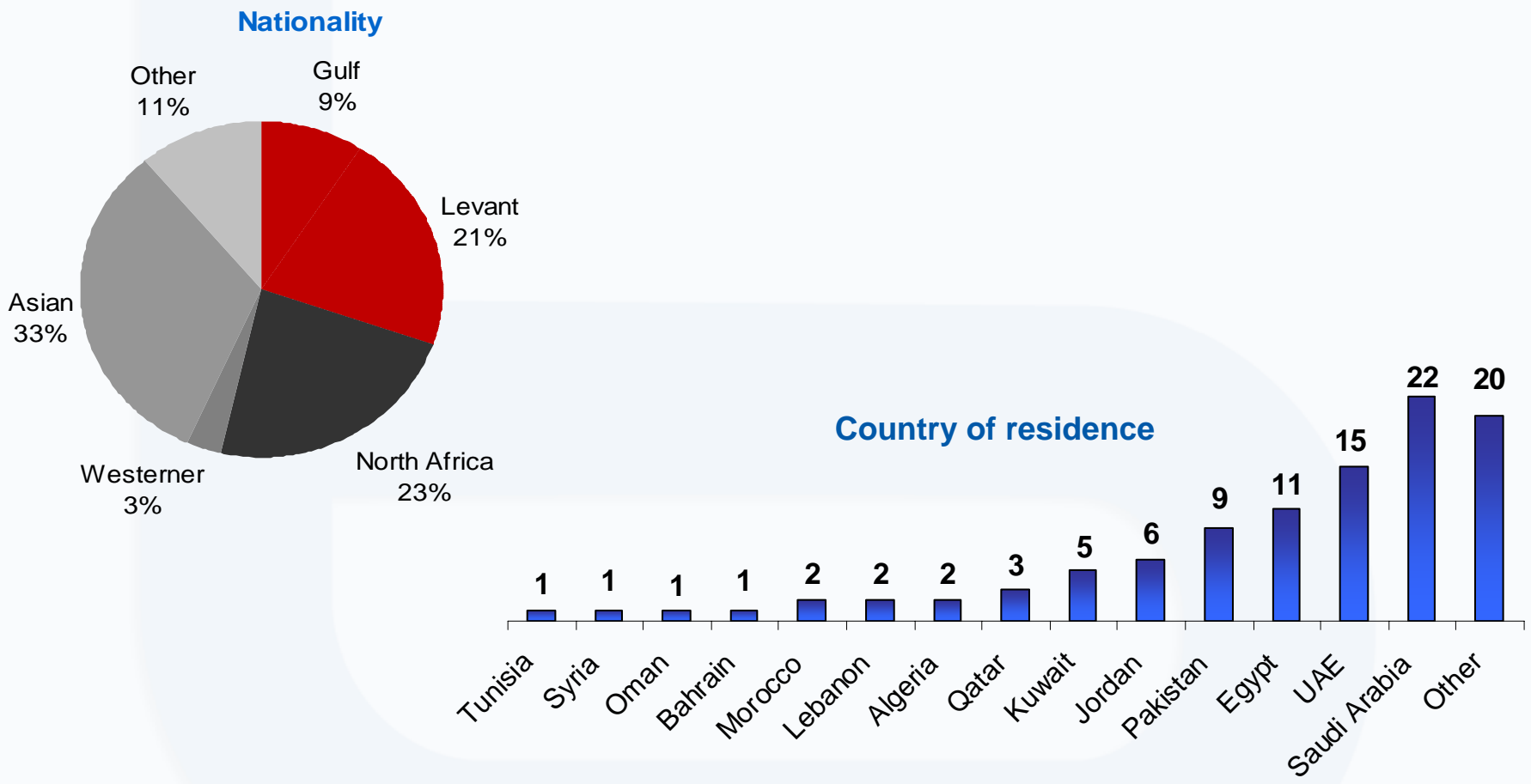
GCC: UAE, KSA, Kuwait, Oman\*, Qatar, Bahrain  
Levant: Lebanon, Syria\*, Jordan  
North Africa: Egypt, Morocco, Algeria, Tunisia\*  
Subcontinent: Pakistan

**\*low samples have not been presented**

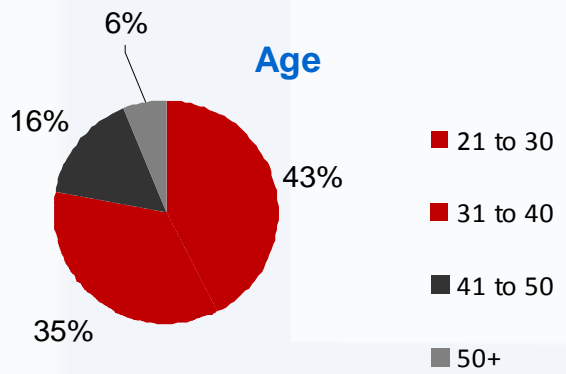
### Methodology:

Online data collection was done between 6<sup>th</sup> and 17<sup>th</sup> March. The total number of respondents achieved was 9,760

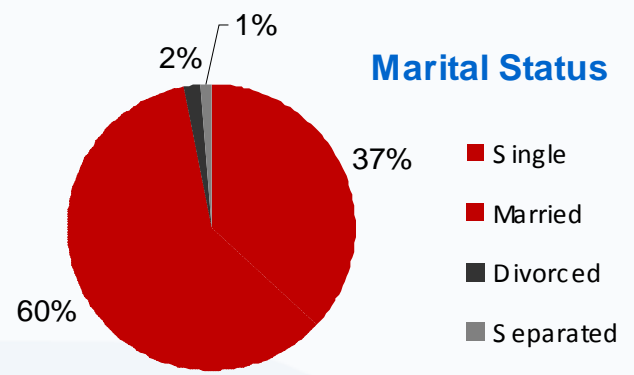
## Respondent profile – Country



## Respondent profile – Personal

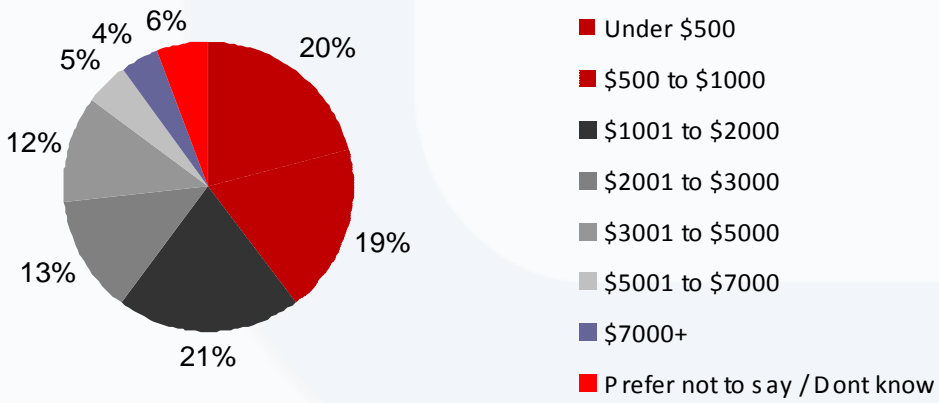


Base: Total Sample – N= 9760



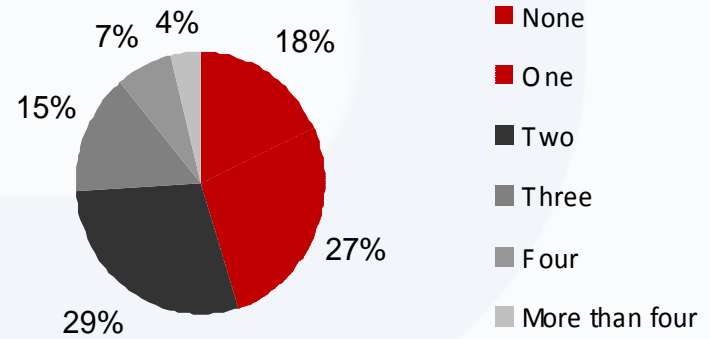
Base: Total Sample – N= 9760

### Monthly Household Income



Base: Total Sample – N= 9760

### No. of children

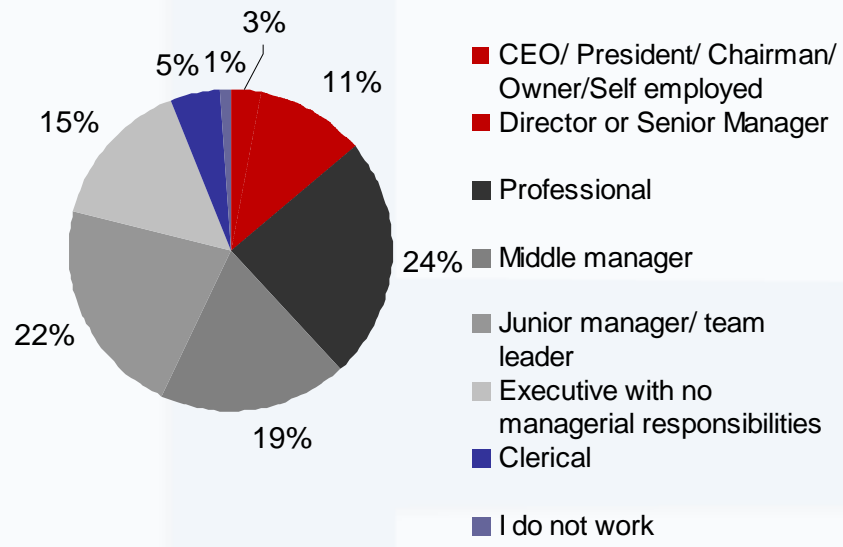


Base: Those who are married – N= 6129

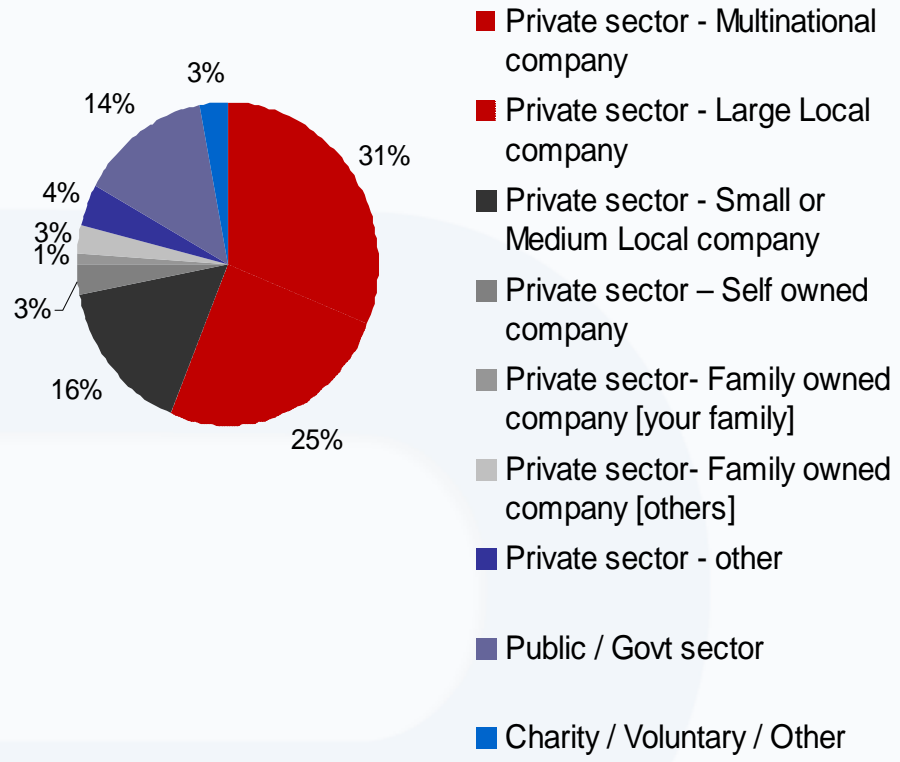


## Respondent profile - Organizational

**Level at work**



**Sector**

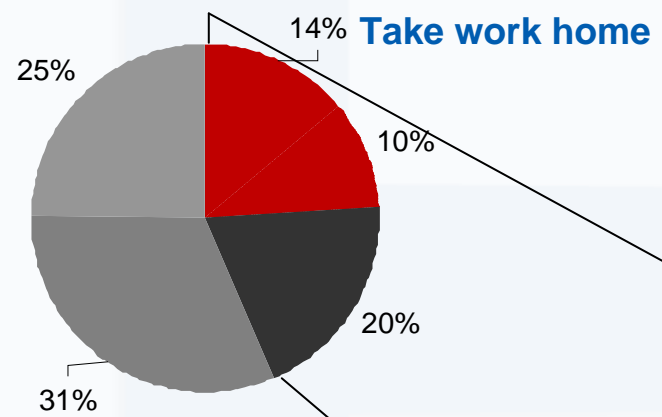


**Working Time**



## Take work home

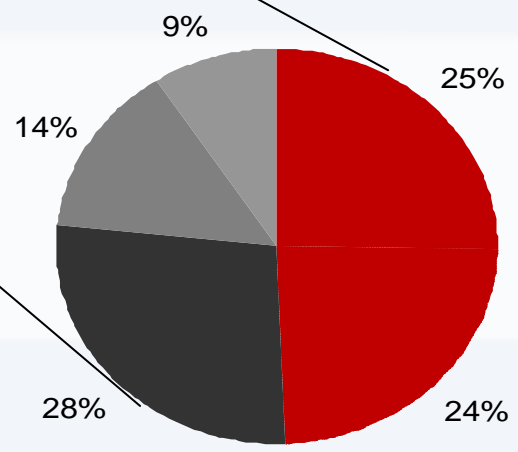
- ✓ Slightly less than half (44%) of working people take work home.
- ✓ Of these, just over three quarters (77%) seem unperturbed by any inconvenience caused. 14% feel burdened by this responsibility.



- Yes, most days
- Yes, once or twice a week
- Yes, occasionally
- Only in exceptional circumstances
- Never

Base: Total Sample – N= 9760

## Attitude towards overtime

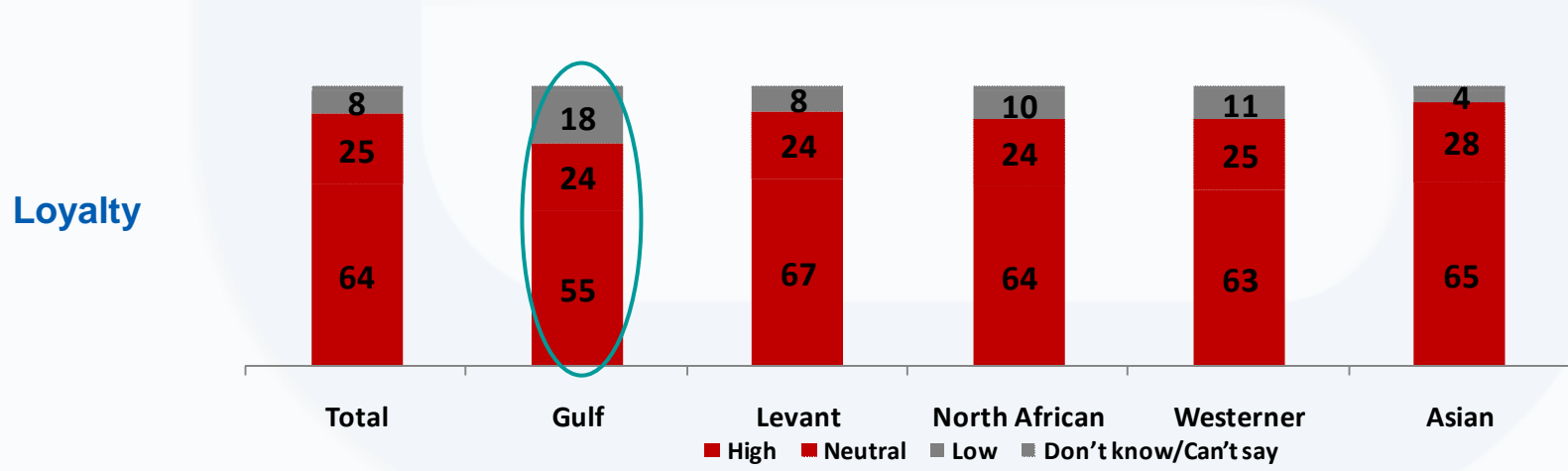
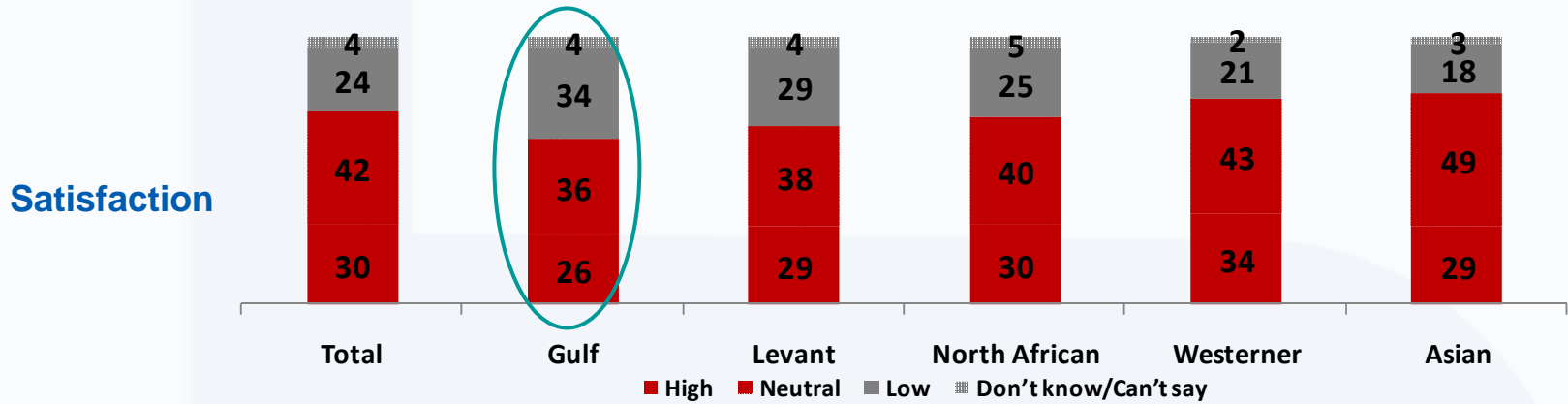


- 'I don't need to take work home but, on the whole, I do so because I like to'
- 'It's a necessary part of my job and, on the whole, I am pleased'
- 'It's a necessary part of my job but, on the whole, I don't mind'
- 'It's a necessary part of my job, and I wish it wasn't'
- None of these

Base: Those who take work home – N= 4258

## Current Job & Work

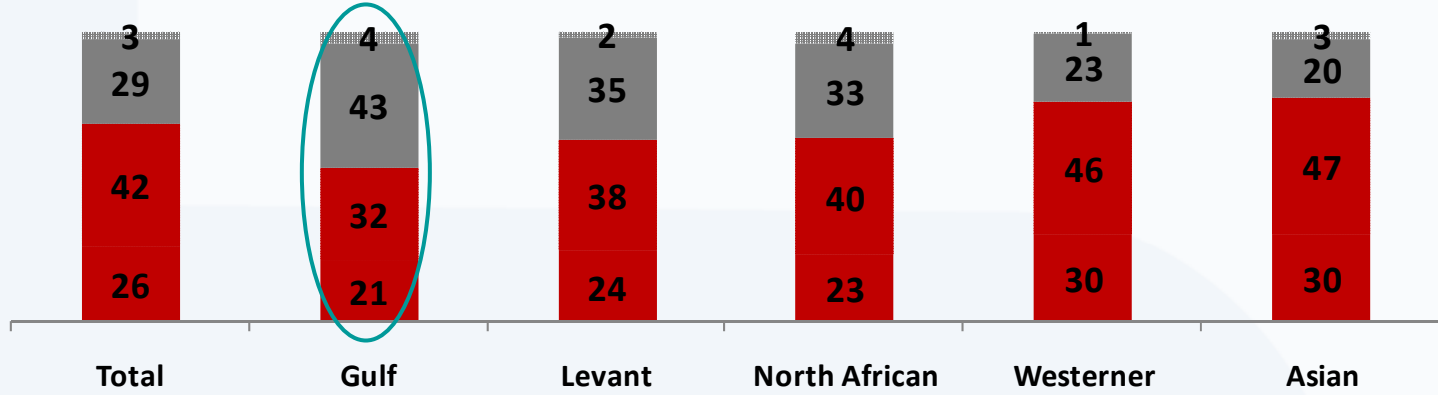
- ✓ GCC nationals have the least satisfaction and loyalty towards their current job & work.
- ✓ Westerners are substantially more satisfied than others.



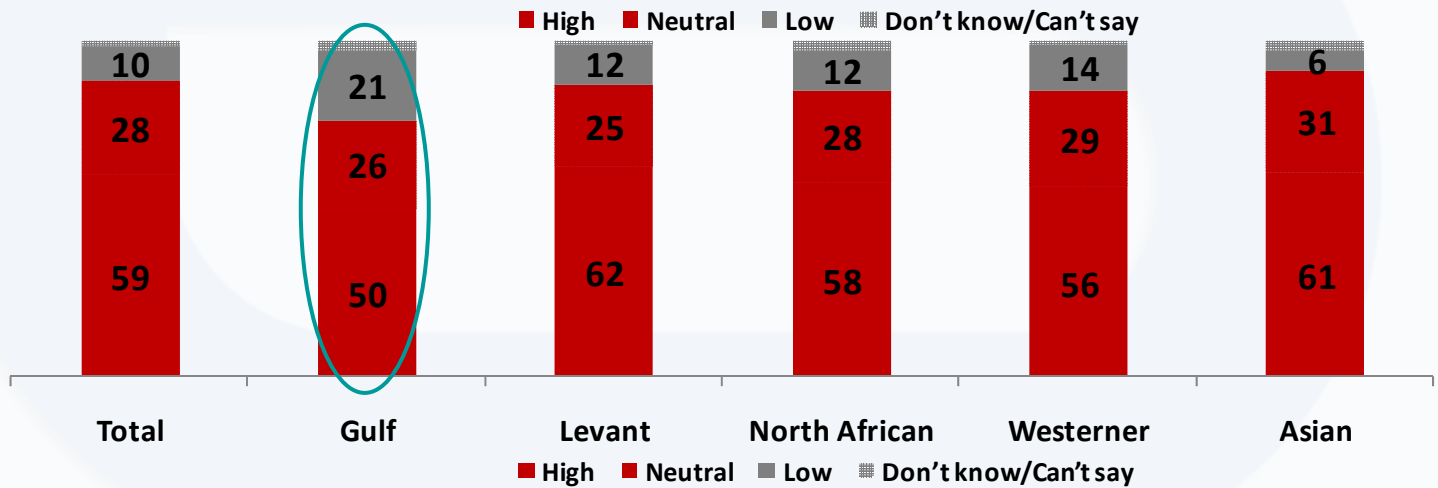
## Organization

- ✓ Relatively lower organizational loyalty & satisfaction amongst GCC nationals.
- ✓ Westerners more satisfied than others

Satisfaction

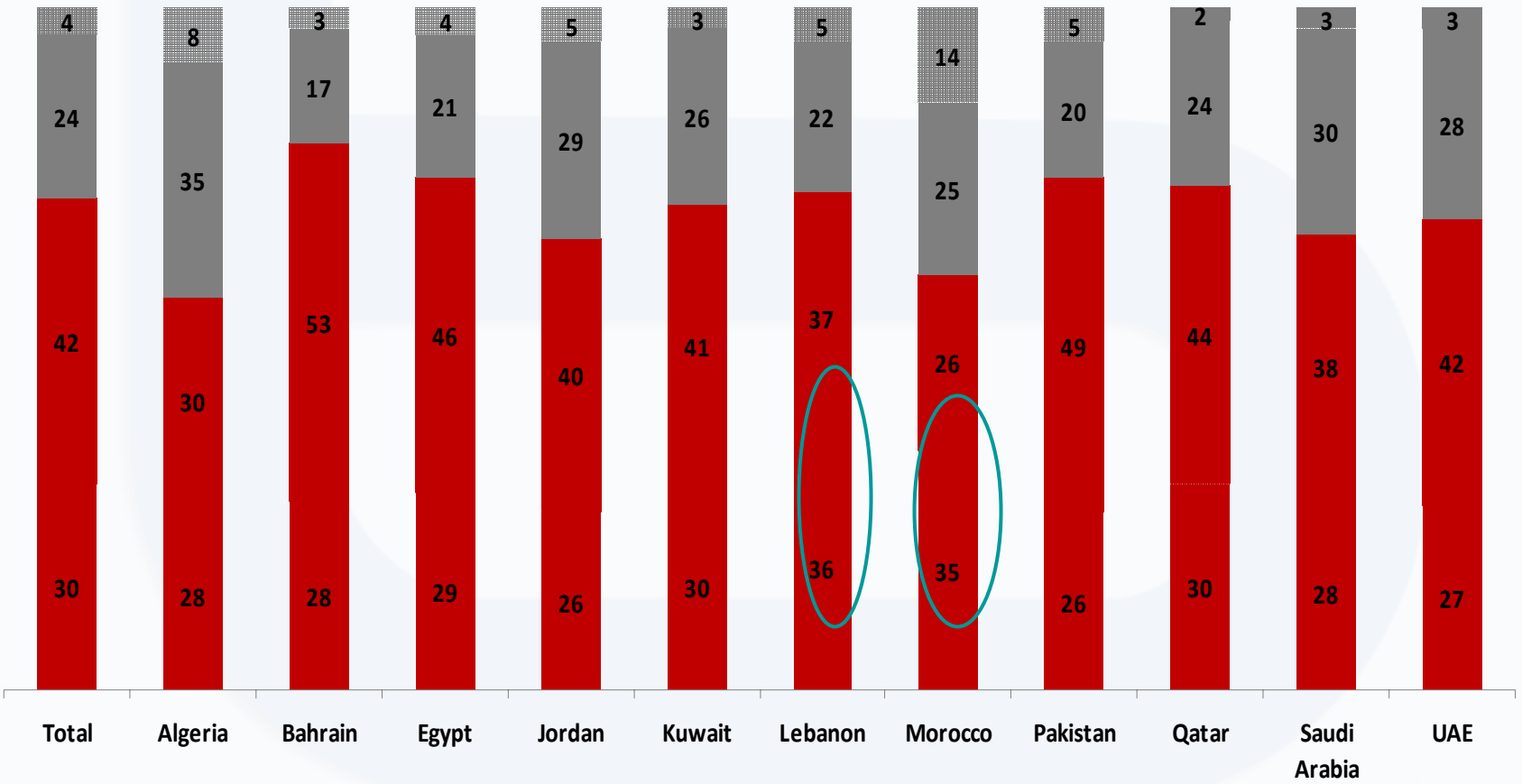


Loyalty



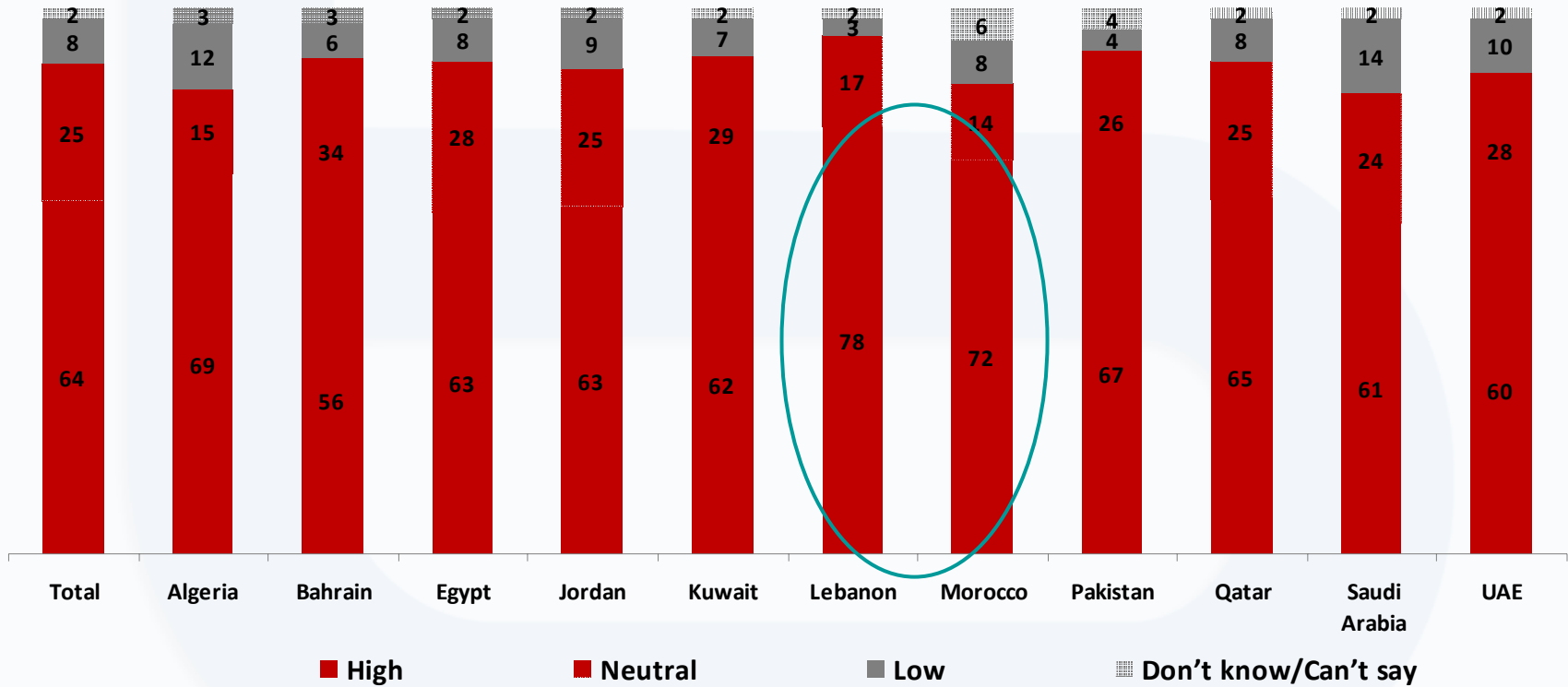
## Satisfaction with current job & work

✓ Lebanon & Morocco score higher on satisfaction.



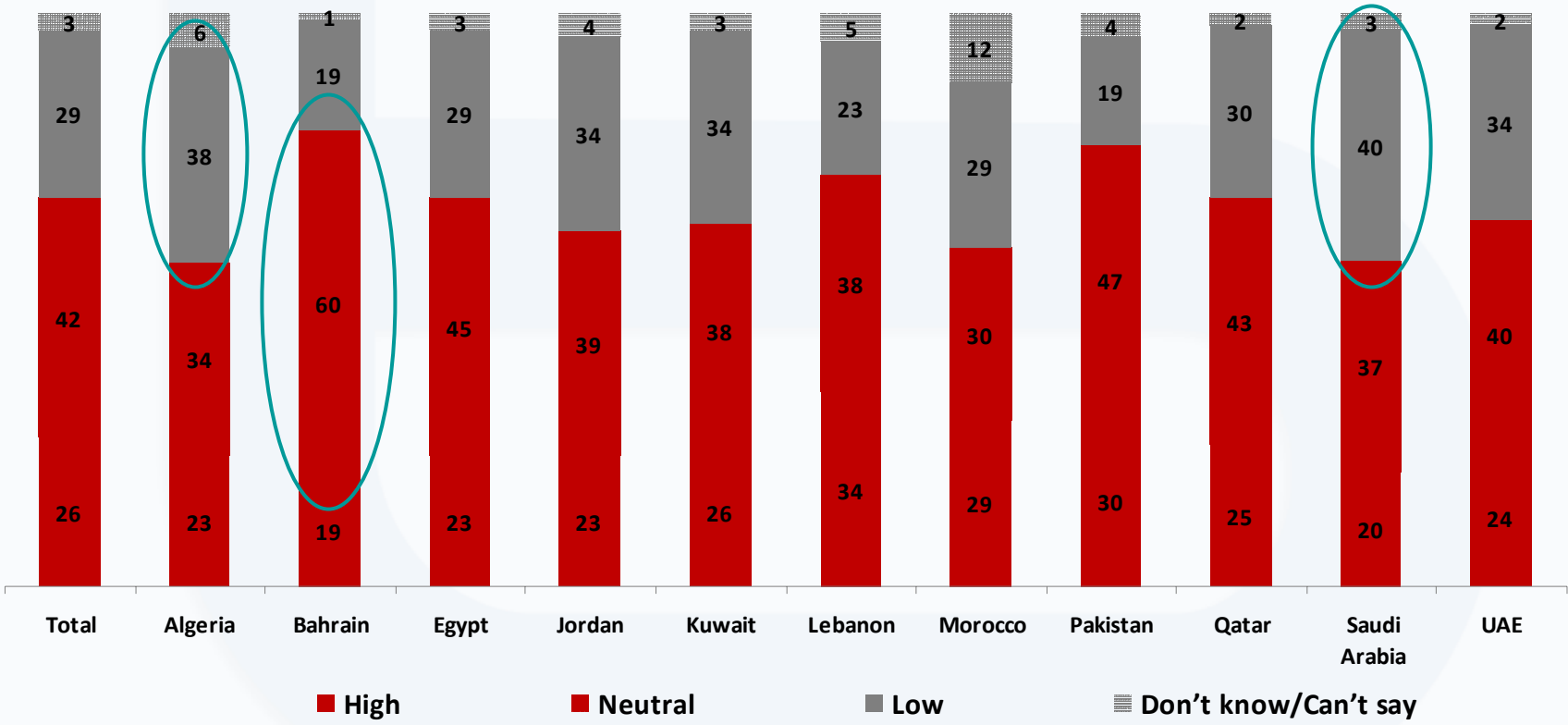
## Loyalty to current job & work

- ✓ The high satisfaction observed for Lebanon & Morocco probably impacts their loyalty.



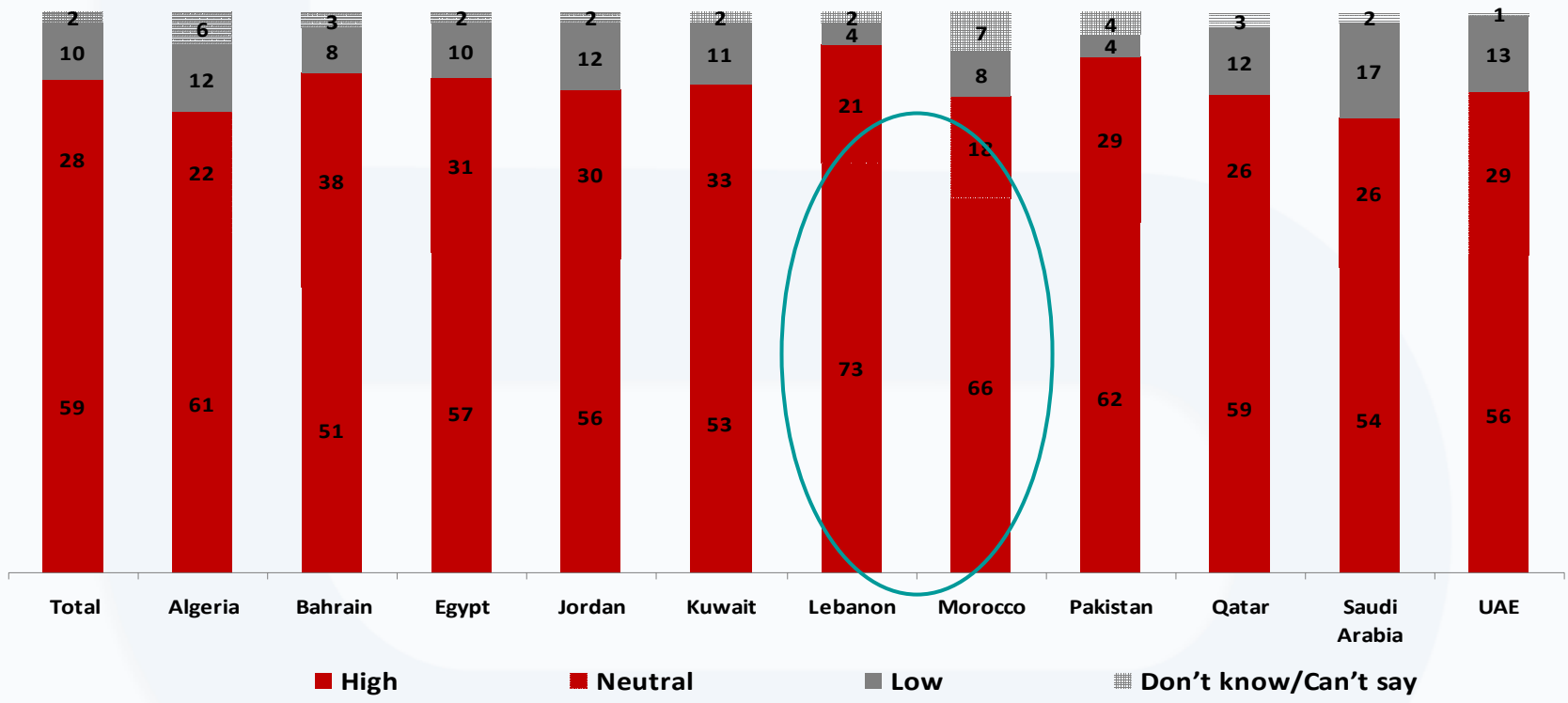
## Satisfaction with organization

- ✓ Relatively higher proportion of dissatisfied employees in KSA & Algeria
- ✓ Employees in Bahrain largely neutral to their organization.



## Loyalty to organization

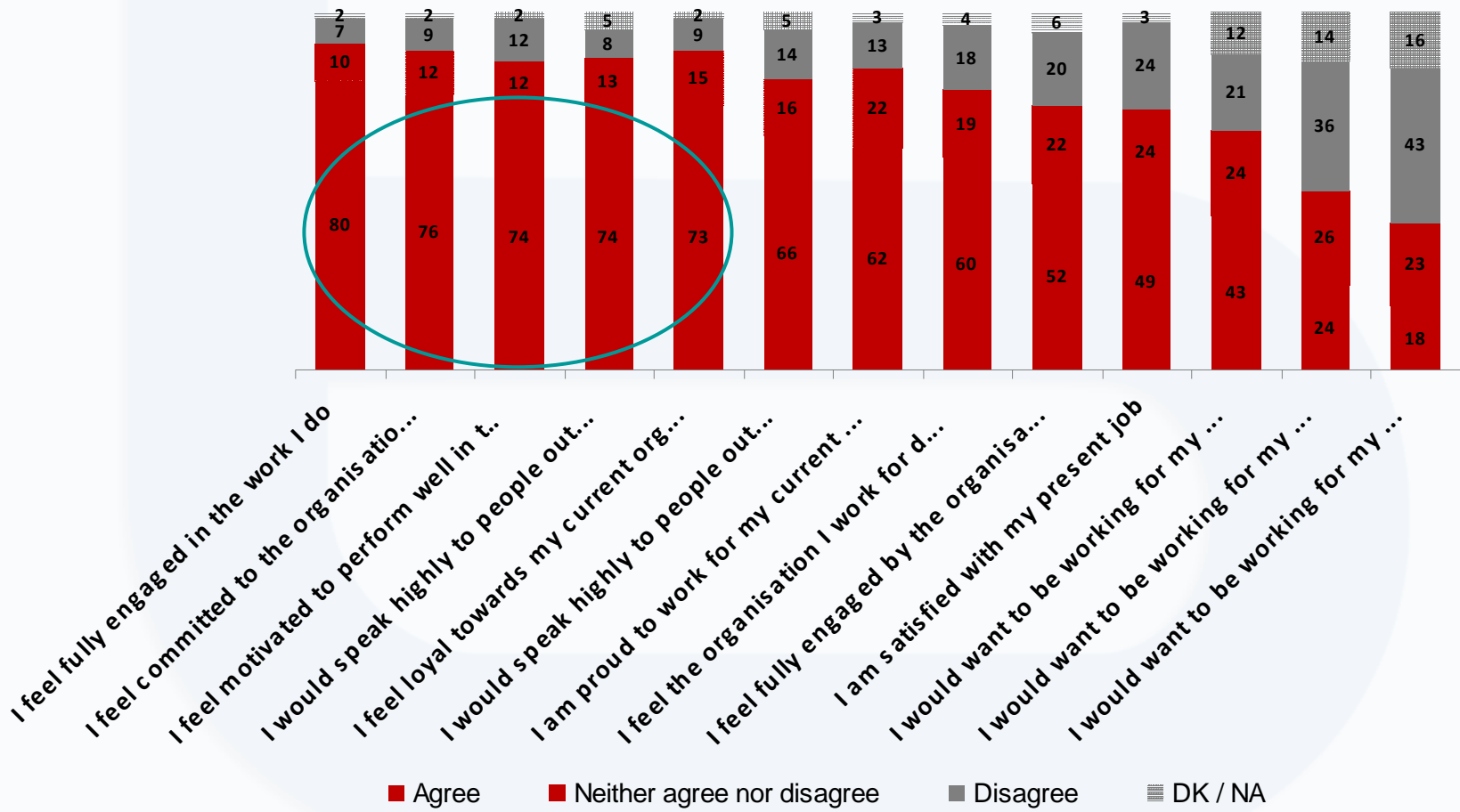
✓ Just as observed in work loyalty, Lebanon & Morocco display higher levels organizational loyalty.





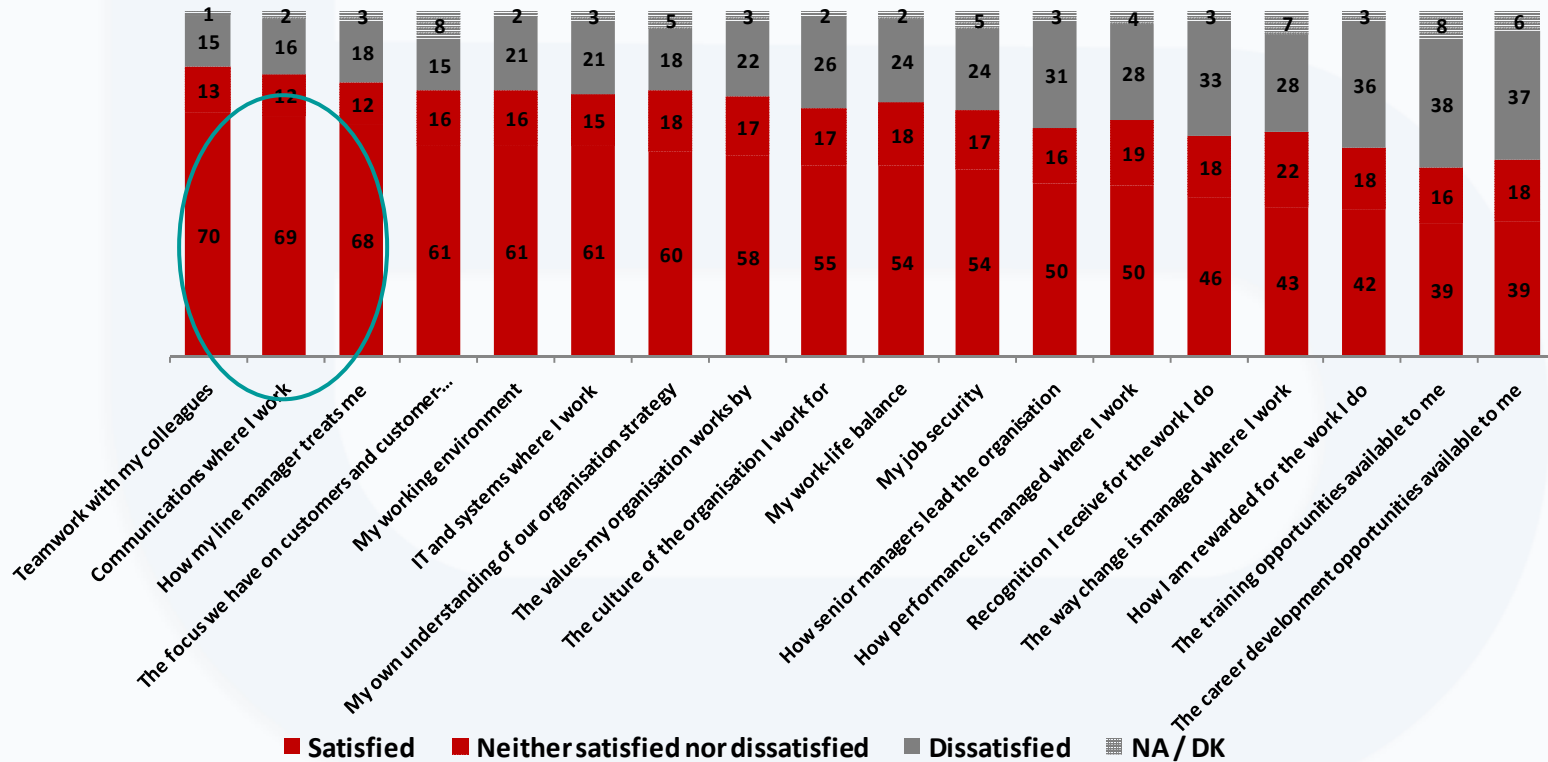
## Your work & Organization

✓ Levels of engagement, commitment, motivation, recommendation & loyalty are quite high which is good news.



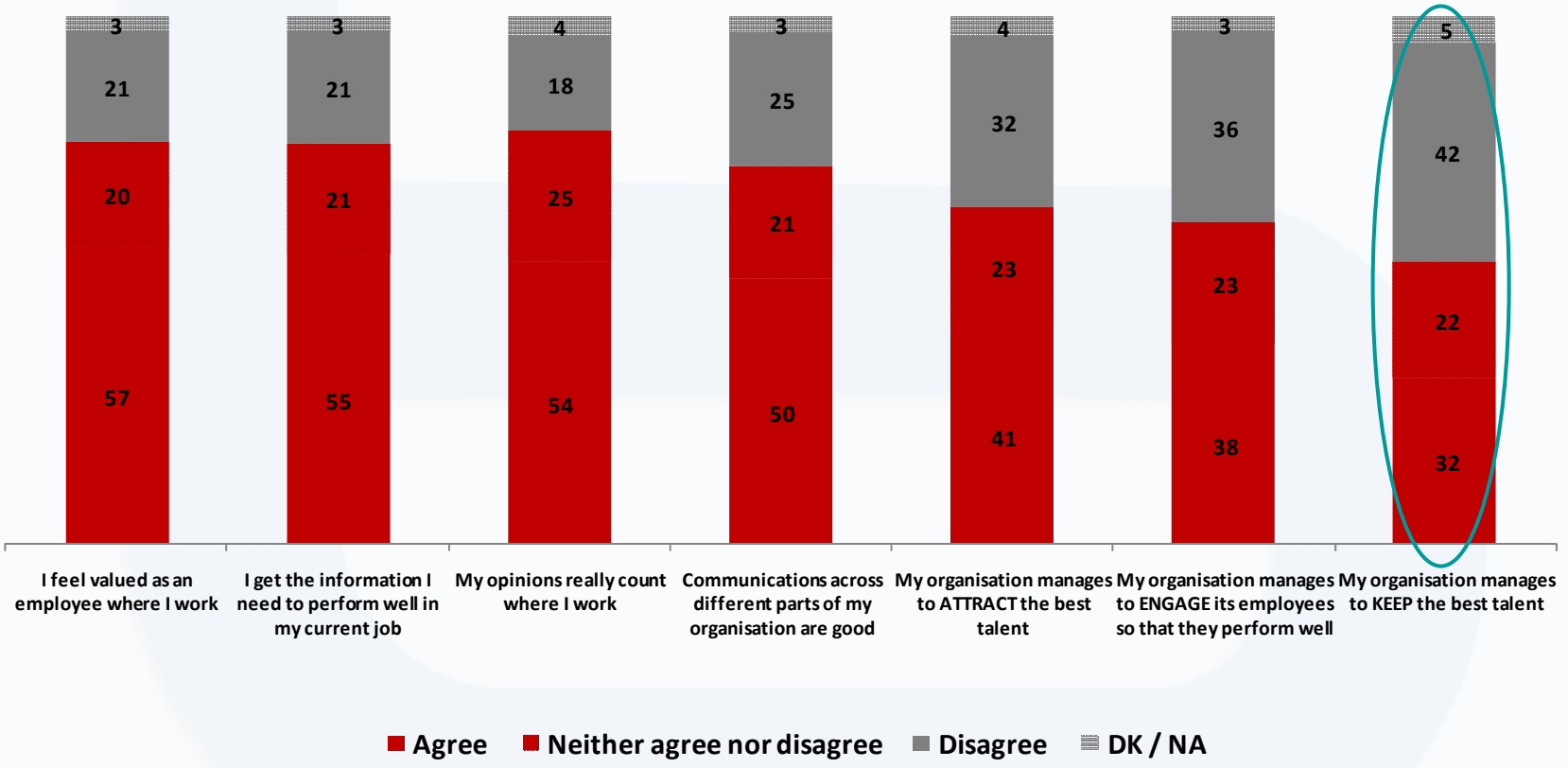
## Satisfaction with your organization

- ✓ Teamwork, effective communication & interaction with the line manager scored high.
- ✓ Rewards, training opportunities and career development opportunities scored lower with the incidence of dissatisfaction almost as high as the incidence of satisfaction in these categories.



## Work life & your organization

✓ Most people believe their organizations DON'T manage to keep the best talent. This could be potentially dangerous for employers.



## Your work & organization

- ✓ Whether you look at the job and work or the organization, one thing comes out very strongly...
- ✓ The higher your satisfaction & loyalty, the more engaged, satisfied, proud, loyal, committed & motivated you are and the longer you are likely to work for that organization.

Thinking about your work and the organisation you work for... To what extent do you agree or disagree with each of the following statements:	Satisfaction with current job & work		Satisfaction with current organization		Loyalty to current job & work		Loyalty to current organization	
	High	Low	High	Low	High	Low	High	Low
<b>Positive Responses</b>								
<b>Base:</b>	<b>2900</b>	<b>2340</b>	<b>2556</b>	<b>2844</b>	<b>6280</b>	<b>801</b>	<b>5769</b>	<b>1016</b>
I feel fully engaged in the work I do	95	57	93	63	89	37	89	48
I am satisfied with my present job	81	13	77	22	58	13	58	17
I feel motivated to perform well in the work I do	91	49	92	55	83	35	83	41
I feel committed to the organisation for which I currently work	89	58	92	58	87	33	91	31
I would speak highly to people outside the organisation about my organisation as an employer	80	46	85	44	74	33	77	29
I would speak highly to people outside the organisation about my organisation's products/service/brands	85	58	88	57	81	46	83	43
I am proud to work for my current organisation	84	32	90	30	72	24	75	21
I feel loyal towards my current organisation	88	49	94	49	87	19	91	15
I feel the organisation I work for deserves my loyalty	78	33	86	29	69	19	73	16
I would want to be working for my current organisation in...1 year's time	52	31	55	32	46	27	47	25
I would want to be working for my current organisation in...3 year's time	38	10	42	10	28	8	29	6
I would want to be working for my current organisation in...10 year's time	30	6	35	6	22	5	23	3
I feel fully engaged by the organisation I work for	71	26	78	27	62	14	65	15

## Your organization

- ✓ Clearly, your satisfaction & loyalty to your work & organization have a strong impact on your perceptions of the management, training & recognition, performance measurement, team work & working environment to name a few.
- ✓ On the flip side of the coin, it can be argued that these aspects result in satisfaction & loyalty.
- ✓ Given this, employers should clearly understand the relationship between these factors and strive to drive satisfaction & loyalty which will then lead to longer retention.

And now thinking about some particular aspects of working at your organisation, to what extent are you satisfied or dissatisfied with each of the following?	Satisfaction with current job & work		Satisfaction with current organization		Loyalty to current job & work		Loyalty to current organization	
	High	Low	High	Low	High	Low	High	Low
<b>Positive Responses</b>								
<b>Base:</b>	<b>2900</b>	<b>2340</b>	<b>2556</b>	<b>2844</b>	<b>6280</b>	<b>801</b>	<b>5769</b>	<b>1016</b>
Communications where I work	84	49	89	49	76	41	78	39
How my line manager treats me	83	46	86	46	73	39	75	42
How senior managers lead the organisation	68	22	80	17	57	17	59	14
The culture of the organisation I work for	72	28	84	23	61	23	65	20
The values my organisation works by	75	32	86	26	66	24	69	20
My work-life balance	73	29	78	32	61	26	63	26
How I am rewarded for the work I do	62	16	71	15	47	14	49	15
Recognition I receive for the work I do	67	18	76	17	52	16	55	15
My job security	69	34	75	34	59	32	60	31
The focus we have on customers and customer-service where I work	75	40	81	39	67	33	70	32
The way change is managed where I work	60	17	70	15	49	14	52	13
The training opportunities available to me	55	18	63	17	44	18	45	17
The career development opportunities available to me	58	16	65	16	44	15	45	15
My own understanding of our organisation strategy	77	39	83	37	67	32	70	30
How performance is managed where I work	69	25	78	22	57	18	59	17
Teamwork with my colleagues	86	51	88	54	77	42	78	47
My working environment	79	34	87	34	69	29	71	29

## Your work & organization

✓ Clearly for organizations that are not in a position to offer the best salaries in the industry, there are other ways to keep your employees engaged and loyal. This will also serve to attract more talent to your organization.

Finally, thinking about some specific aspects of your work life please tell us to what extent you agree or disagree with the following statements?	Satisfaction with current job & work		Satisfaction with current organization		Loyalty to current job & work		Loyalty to current organization	
	High	Low	High	Low	High	Low	High	Low
<b>Base:</b>	<b>2900</b>	<b>2340</b>	<b>2556</b>	<b>2844</b>	<b>6280</b>	<b>801</b>	<b>5769</b>	<b>1016</b>
My organisation manages to ATTRACT the best talent	58	19	69	17	46	18	48	15
My organisation manages to ENGAGE its employees so that they perform well	57	14	69	10	44	11	47	9
My organisation manages to KEEP the best talent	50	11	61	9	38	9	40	6
My opinions really count where I work	75	28	80	30	61	23	64	23
I get the information I need to perform well in my current job	74	30	81	30	62	23	64	22
Communications across different parts of my organisation are good	66	28	77	27	57	23	59	22
I feel valued as an employee where I work	80	27	84	28	65	19	68	20

## Your work & organization

- ✓ Pakistan scores highest on many dimensions. Morocco needs to take steps to increase loyalty & retention.
- ✓ UAE reported lower commitment & motivation figures.

Note: Amongst those who agreed with each of the statements below, we've highlighted the highest (in blue) and the lowest (in red).

Thinking about your work and the organisation you work for, to what extent do you agree or disagree with each of the following statements:	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Pakistan	Qatar	Saudi Arabia	UAE
<b>Base:</b>	9760	181	108	1113	549	481	194	206	925	315	2099	1416
I feel fully engaged in the work I do	80	75	85	75	73	82	81	72	91	81	74	80
I am satisfied with my present job	49	46	48	53	47	47	47	38	48	48	48	42
I feel motivated to perform well in the work I do	74	74	71	78	76	74	73	83	78	73	71	65
I feel committed to the organisation for which I currently work	76	74	78	81	72	75	81	75	80	75	76	71
I would speak highly to people outside the organisation about my organisation as an employer	66	56	72	69	70	63	74	55	69	67	63	63
I would speak highly to people outside the organisation about my organisation's products/service/brands	74	58	81	76	73	72	78	59	79	73	70	74
I am proud to work for my current organisation	62	58	65	64	61	60	71	51	66	59	57	59
I feel loyal towards my current organisation	73	72	73	73	69	70	83	58	86	72	65	69
I feel the organisation I work for deserves my loyalty	60	55	56	56	54	55	68	47	76	63	50	56
I would want to be working for my current organisation in...1 year's time	43	35	45	40	44	47	40	29	47	52	43	45
I would want to be working for my current organisation in...3 year's time	24	20	24	21	24	25	24	13	30	27	24	25
I would want to be working for my current organisation in...10 year's time	18	19	17	16	18	17	19	9	22	17	18	15
I feel fully engaged by the organisation I work for	52	34	64	42	44	53	53	35	69	55	46	53

## Your organization

- ✓ Lebanon and Pakistan are strong on most aspects.
- ✓ KSA scores poorly on nearly all.

And now thinking about some particular aspects of working at your organisation, to what extent are you satisfied or dissatisfied with each of the following?	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Pakistan	Qatar	Saudi Arabia	UAE
Base:	9760	181	108	1113	549	481	194	206	925	315	2099	1416
Communications where I work	69	63	59	71	73	65	75	66	75	72	66	65
How my line manager treats me	68	66	73	71	72	63	77	67	73	70	62	64
How senior managers lead the organisation	50	49	49	45	43	41	61	49	62	49	38	48
The culture of the organisation I work for	55	53	55	50	55	51	68	52	61	54	45	51
The values my organisation works by	58	57	60	53	56	51	68	57	68	57	49	52
My work-life balance	54	52	53	55	52	53	52	51	61	57	50	47
How I am rewarded for the work I do	42	33	41	42	36	39	47	39	51	43	34	40
Recognition I receive for the work I do	46	42	45	44	42	43	54	43	56	46	38	42
My job security	54	60	57	50	53	54	64	49	56	51	48	53
The focus we have on customers and customer-service where I work	61	53	57	61	58	60	72	54	68	58	53	59
The way change is managed where I work	43	40	41	38	38	39	47	44	53	42	34	40
The training opportunities available to me	39	35	35	38	33	34	49	45	45	38	29	35
The career development opportunities available to me	39	34	36	36	43	36	47	45	44	36	32	38
My own understanding of our organisation strategy	60	55	62	58	64	58	72	61	66	60	52	56
How performance is managed where I work	50	48	52	49	51	45	63	52	54	47	41	44
Teamwork with my colleagues	70	77	63	70	68	66	72	72	80	72	63	66
My working environment	61	60	66	59	58	58	67	59	72	60	53	59
IT and systems where I work	61	61	58	61	66	61	62	57	67	57	53	55



## Your work & organization

- ✓ As seen earlier, respondents in Pakistan are amongst the most optimistic.
- ✓ Lebanon is clearly working towards a stable and communicative environment.
- ✓ KSA needs to improve working conditions.

Finally, thinking about some specific aspects of your work life please tell us to what extent you agree or disagree with the following statements?	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Pakistan	Qatar	Saudi Arabia	UAE
<b>Base:</b>	9760	181	108	1113	549	481	194	206	925	315	2099	1416
<b>My organisation manages to ATTRACT the best talent</b>	41	35	42	39	39	35	47	44	52	38	31	39
<b>My organisation manages to ENGAGE its employees so that they perform well</b>	38	28	38	30	32	33	47	36	53	35	26	36
<b>My organisation manages to KEEP the best talent</b>	32	25	32	27	26	27	42	37	46	34	23	29
<b>My opinions really count where I work</b>	54	44	50	56	52	48	63	60	59	50	47	48
<b>I get the information I need to perform well in my current job</b>	55	51	52	55	55	52	63	59	67	53	45	49
<b>Communications across different parts of my organisation are good</b>	50	41	47	49	54	45	65	46	63	45	43	45
<b>I feel valued as an employee where I work</b>	57	52	51	60	55	54	61	61	65	56	51	51

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