

Job Situation in the recession

April 2009

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Objective

- To understand how the current recession is affecting people's professional and to an extent financial aspect of their personal lives.
- The survey aims to provide some kind of clarity to job seekers and employers in the current scenario. It is by no means meant to provide information from an economic angle but rather from an HR point of view.

Demographic Background & Methodology

Age and Gender

Adult males and females

Aged 21+ years

Nationalities

GCC Arabs, North Africans, Levant, Western Expats, Asians & Others

Country of Residence

GCC: UAE, KSA, Kuwait, Oman*, Qatar, Bahrain*

Levant: Lebanon*, Syria*, Jordan

North Africa: Egypt, Morocco, Algeria, Tunisia*

Subcontinent: Pakistan

*low sample

Methodology

Online data collection was done between 17th March to 6th April 2009. The total number of respondents achieved was 10,781.

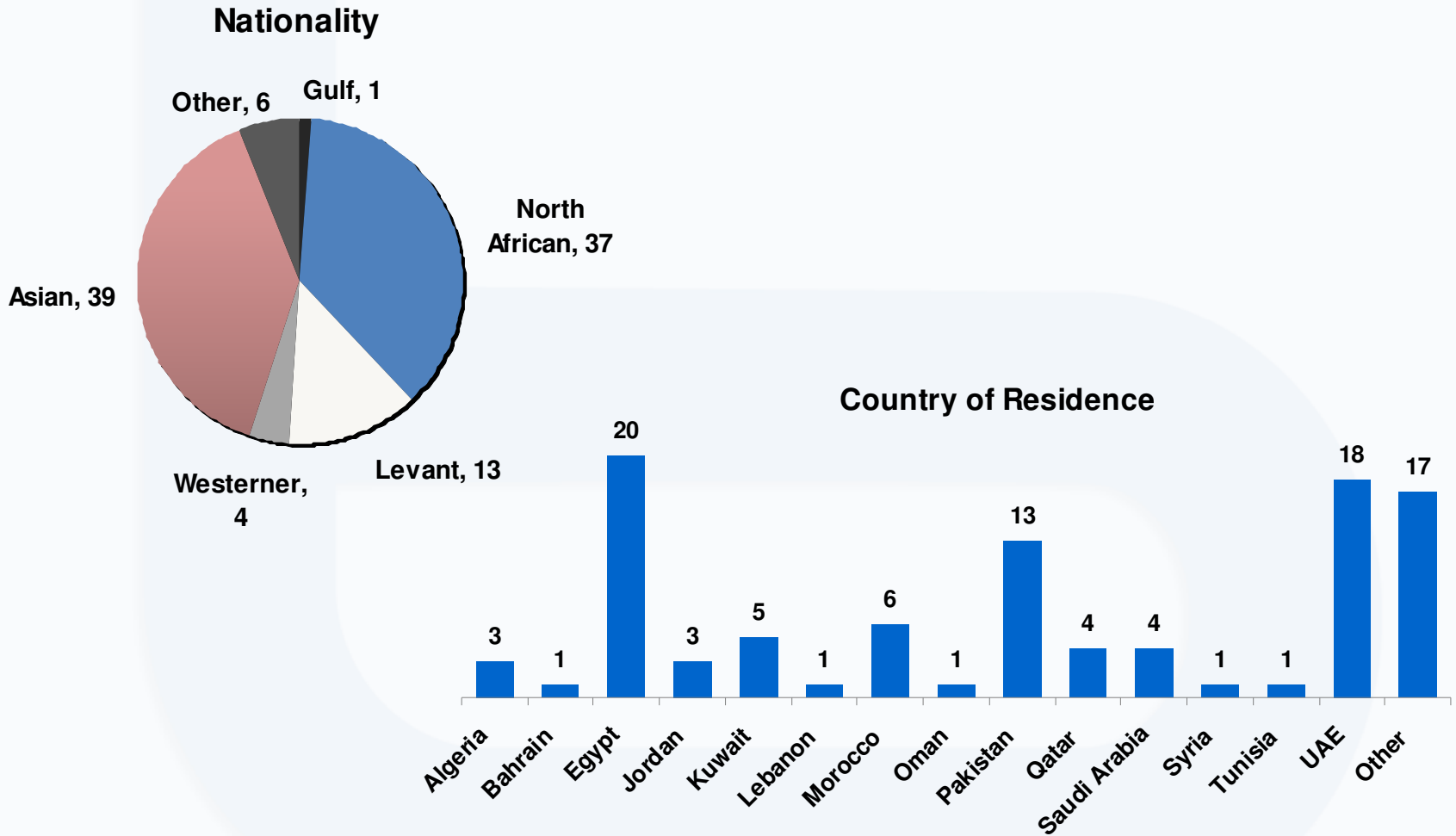
RESPONDENT PROFILE

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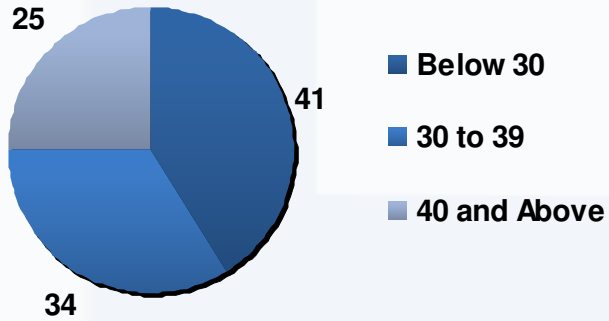
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Respondent profile – Country

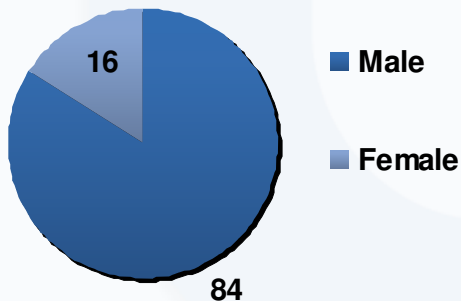


Respondent profile - Personal

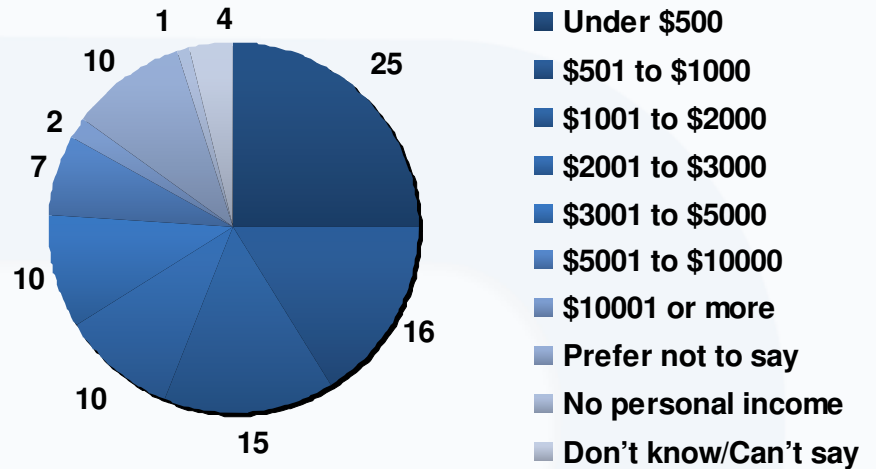
Age



Gender

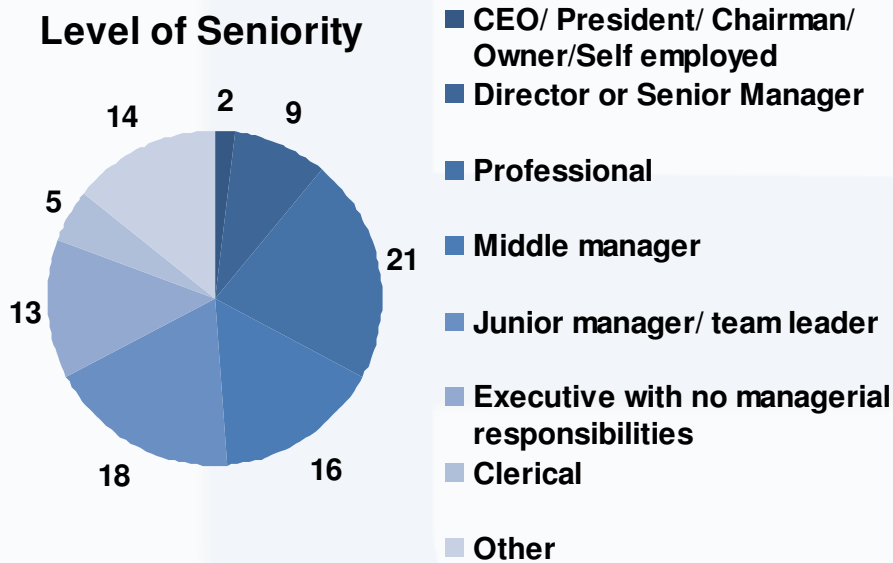


Monthly Personal Income

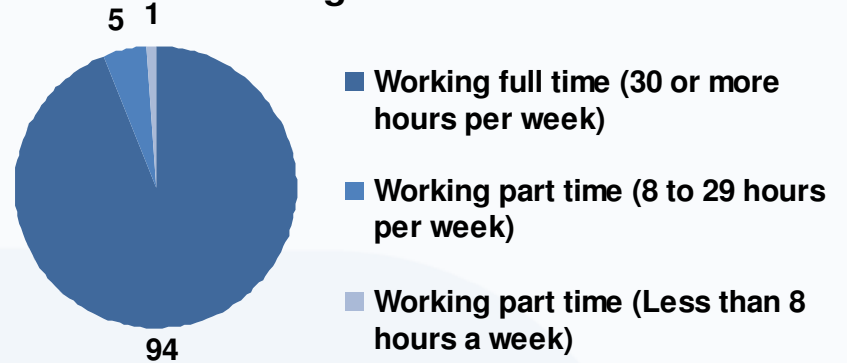


Respondent profile - Professional

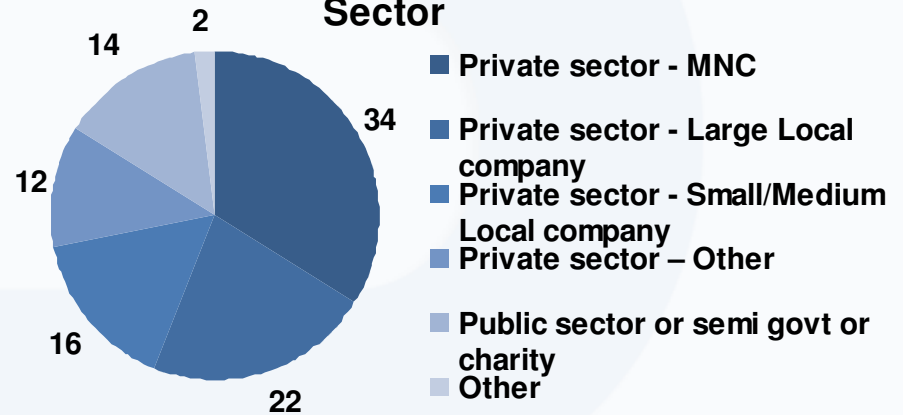
Level of Seniority



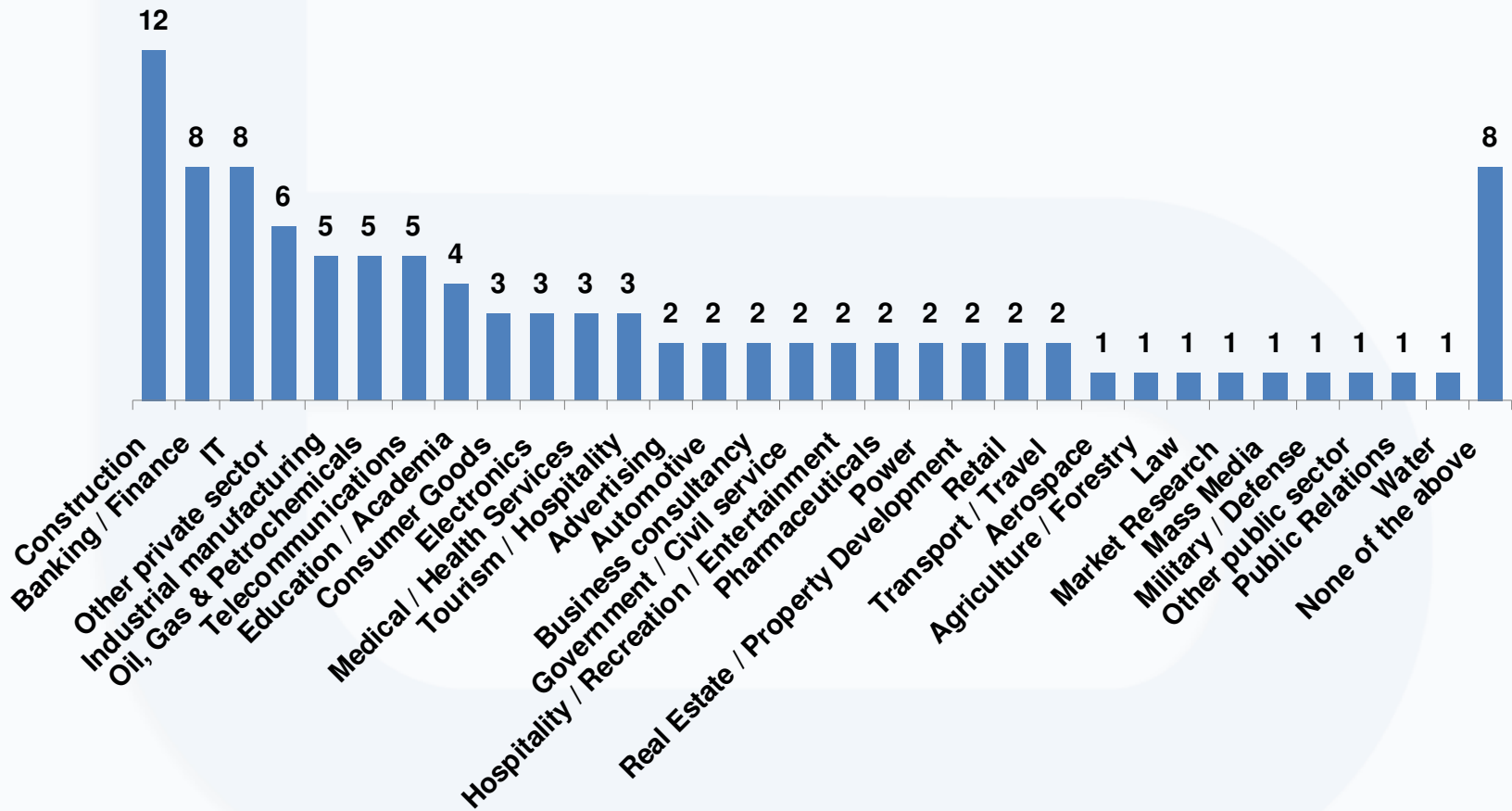
Working Status



Sector



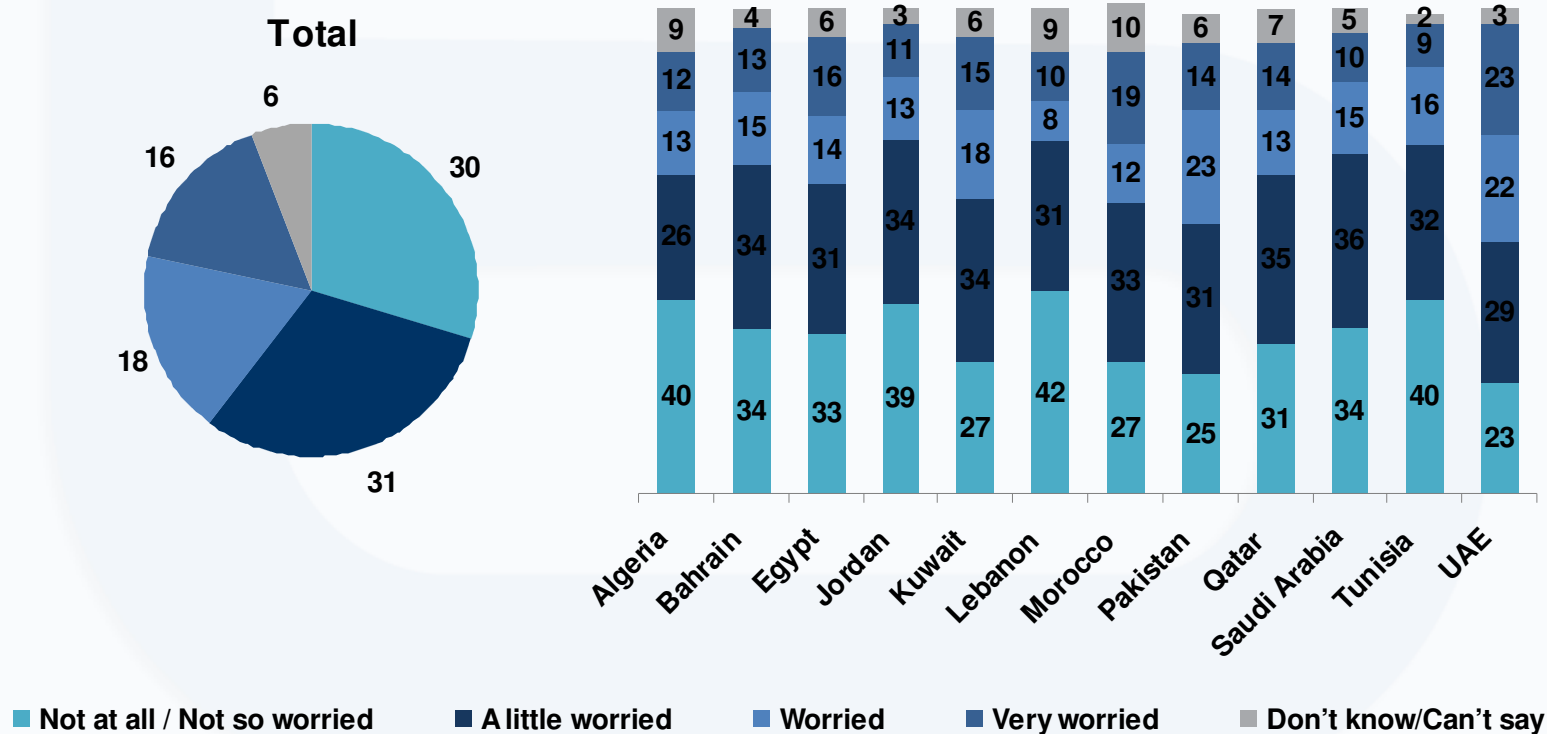
Respondent profile - Professional



Are people secure?

- On the whole, 65% worried to varying extents.
- UAE has the most serious job concerns with close to a quarter very worried.

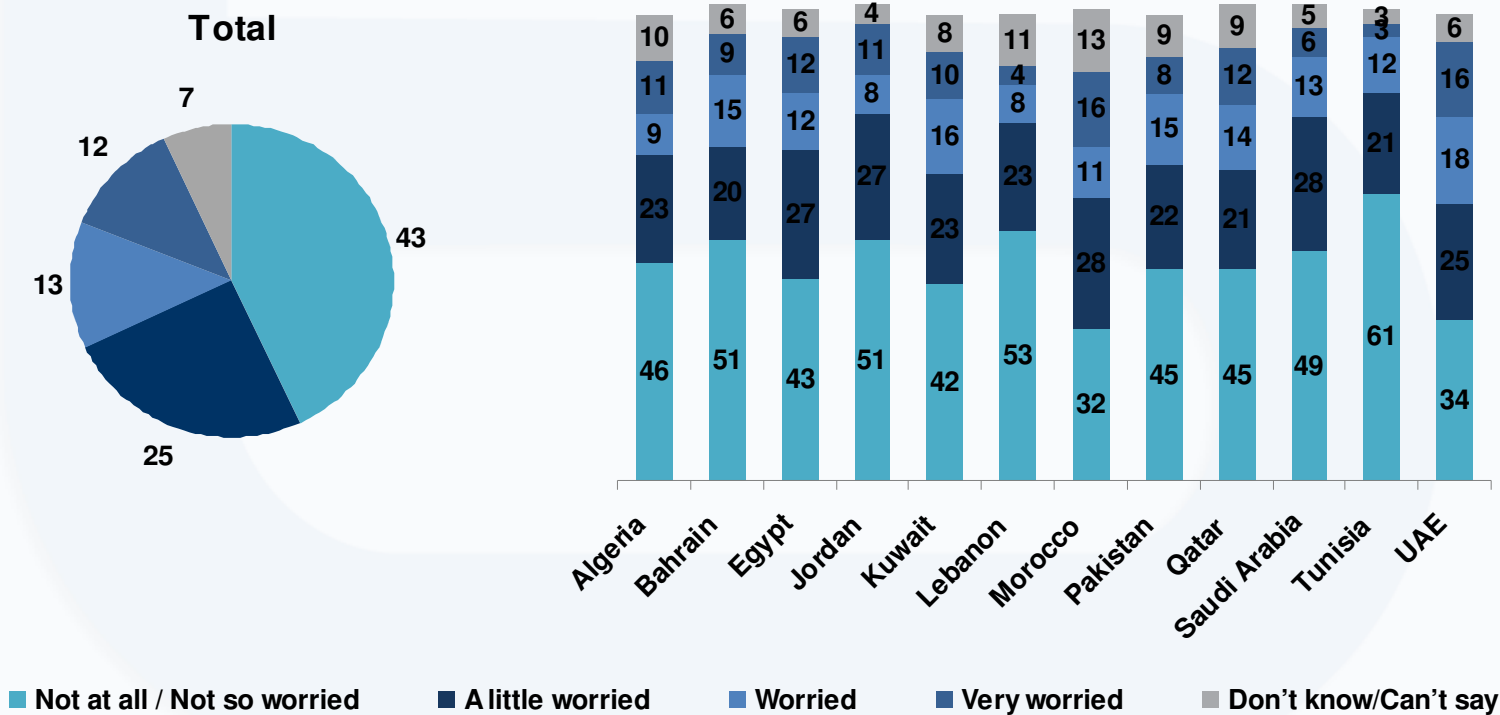
Q: How worried are you about the situation of your current job?



Are companies secure?

- Majority believe companies are quite resilient and will be able to survive the current economic downturn.
- UAE again amongst the most worried with Morocco bagging second place.

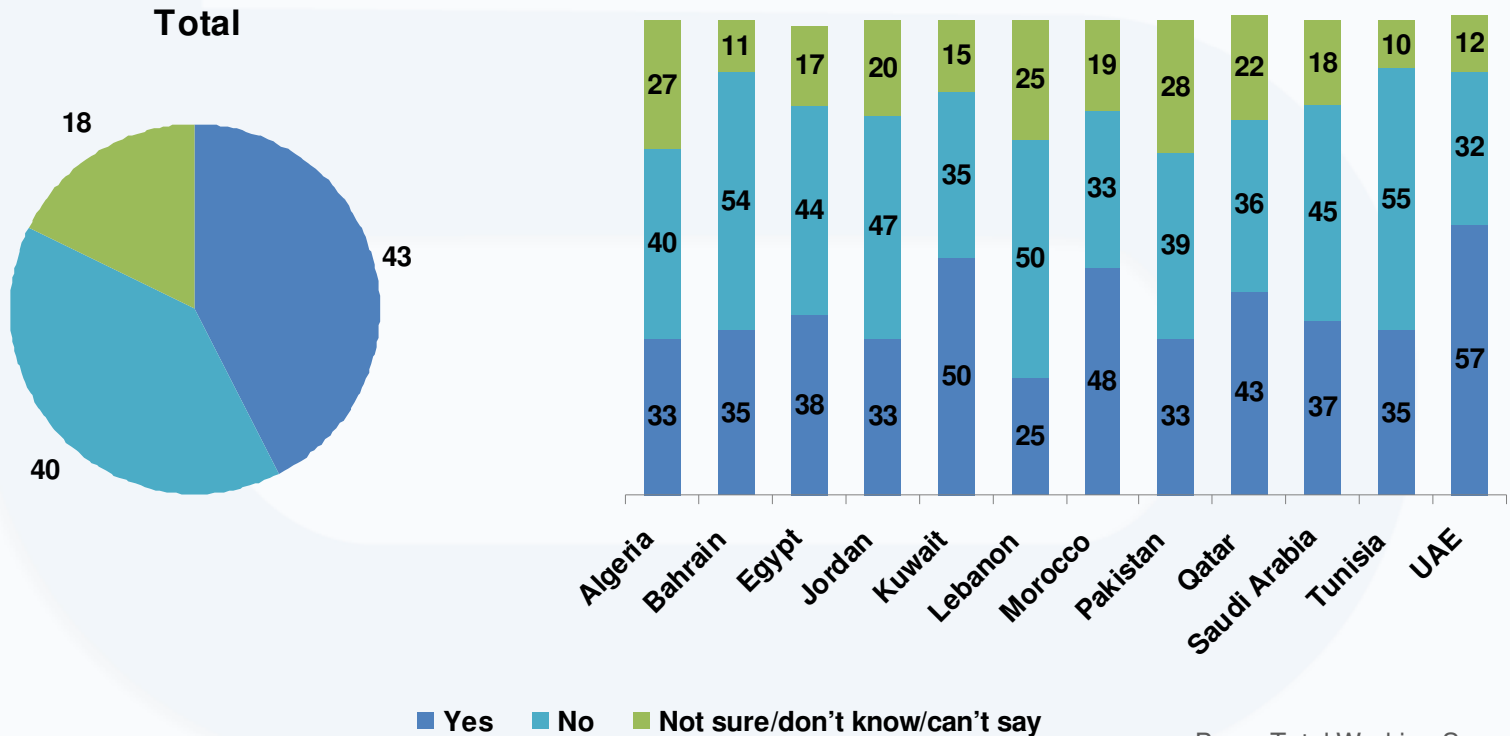
Q: How worried are you about the survival of your company?



Job cuts in current company

- At an overall level, there are slightly more companies who have had to fire staff than those who have managed to retain staff thus far.
- UAE understandably shaken with the highest number of companies witnessing job cuts. Kuwait and Morocco are also feeling the impact of the recession only marginally less than the UAE.

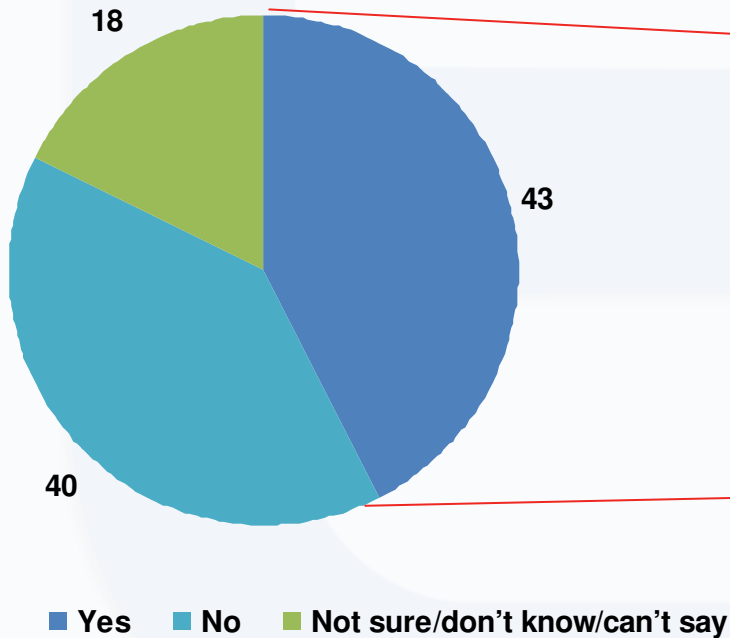
Q: Have there been any job cuts in your company?



Number of jobs lost

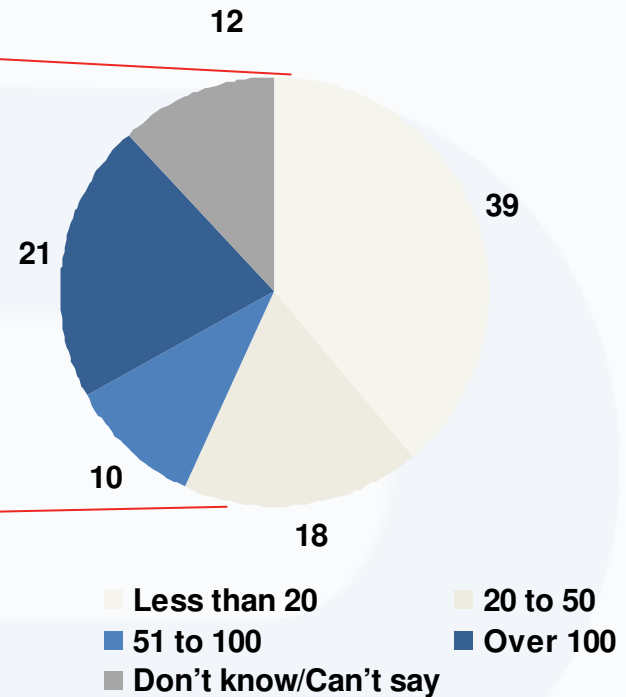
- Amongst those who have said there were job cuts in their company, 21% witnessed over 100 job cuts.

Q: Have there been any job cuts in your company?



Base: Total Working Sample : 10781

Q: How many employees of your company have lost their jobs?

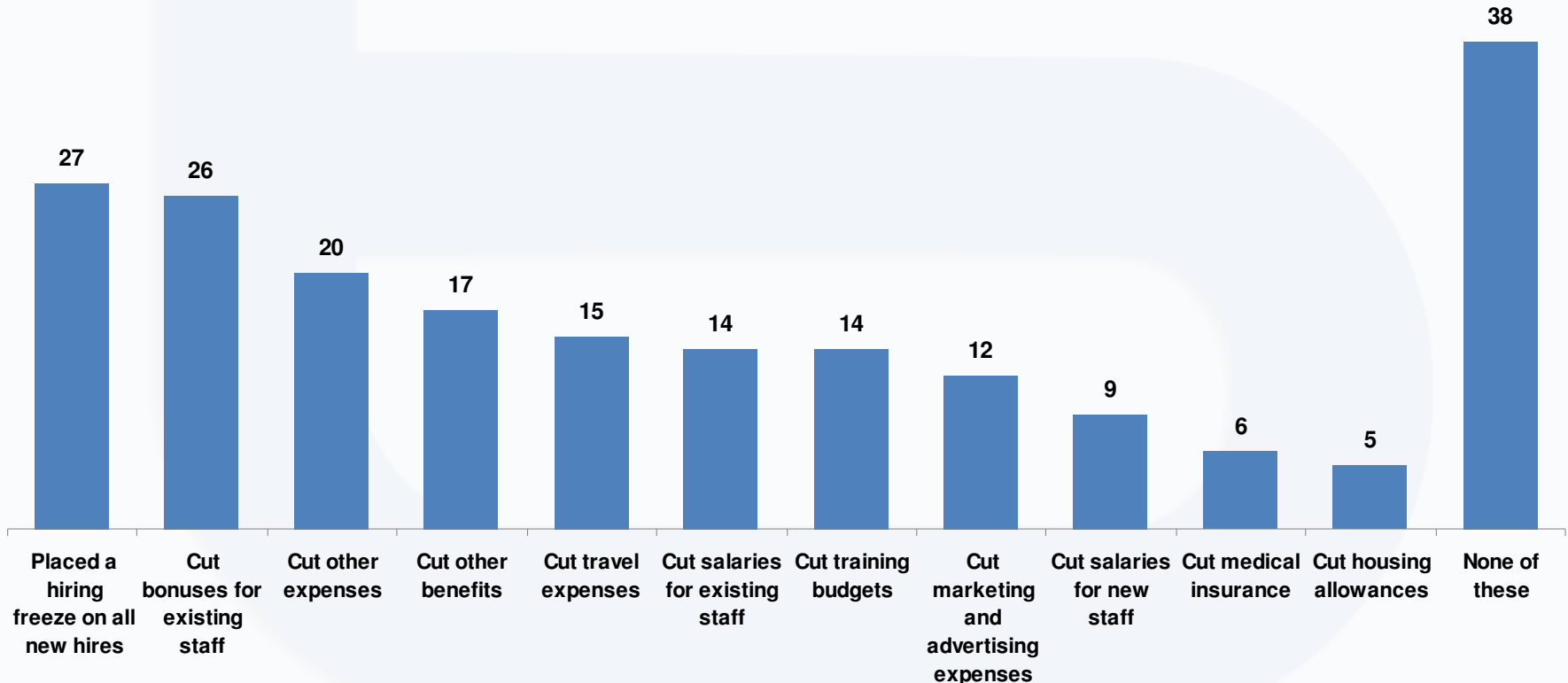


Base: Those who said there are job cuts in their company :4595

Steps taken by companies to combat the situation

- Top steps taken by companies to survive in the current scenario were placing a freeze on new hires, cut bonuses of existing staff and an attempt to cut down on expenses and benefits.

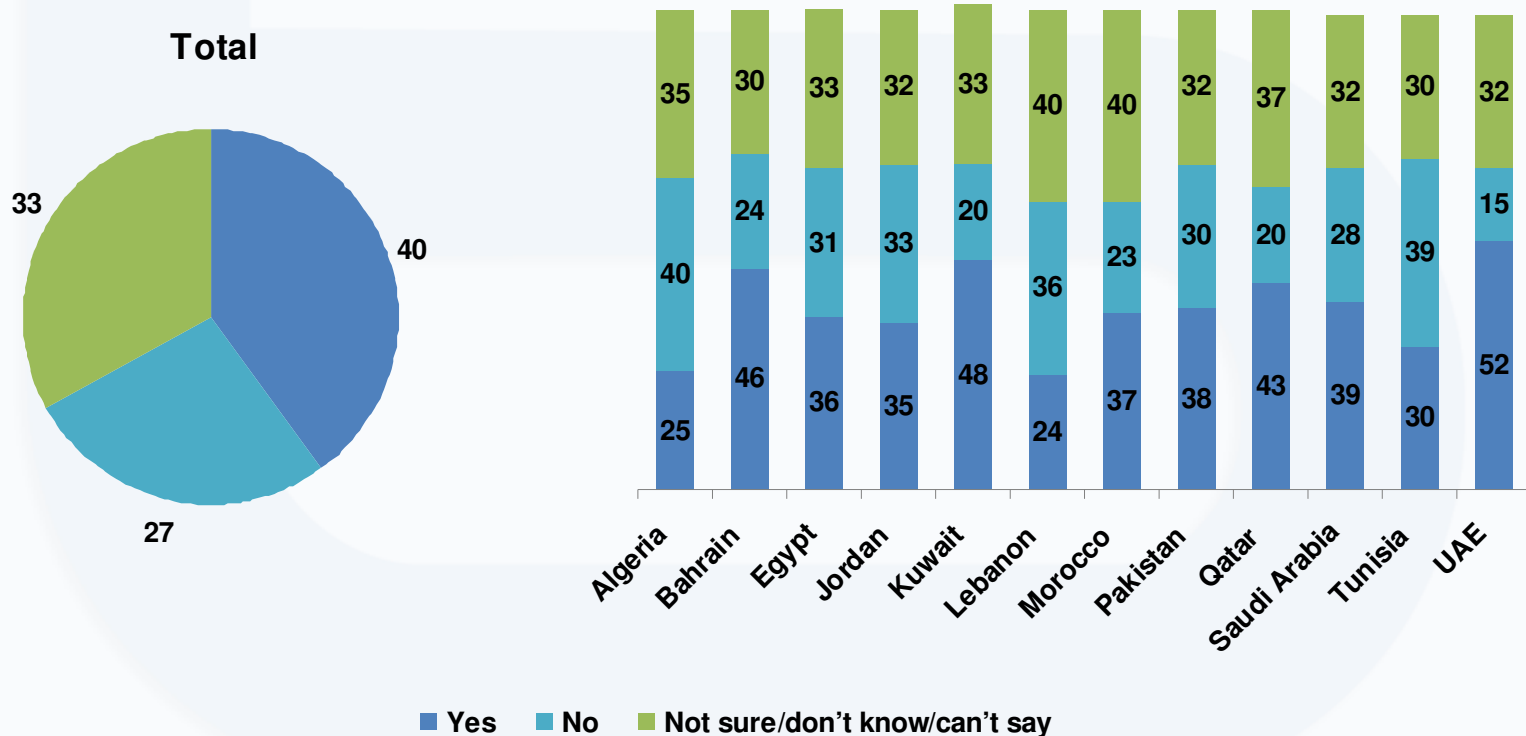
Q: Has your company taken any of the following steps in the last 9 months? Please select all that apply.



Expected job cuts in current company

- Overall, there seem to be far more people who are expecting job cuts than those who aren't.
- UAE, Kuwait, Bahrain & Qatar are the most worried about the current situation and expecting to see the highest number of job redundancies.

Q: Do you expect any job cuts in your company in the future?

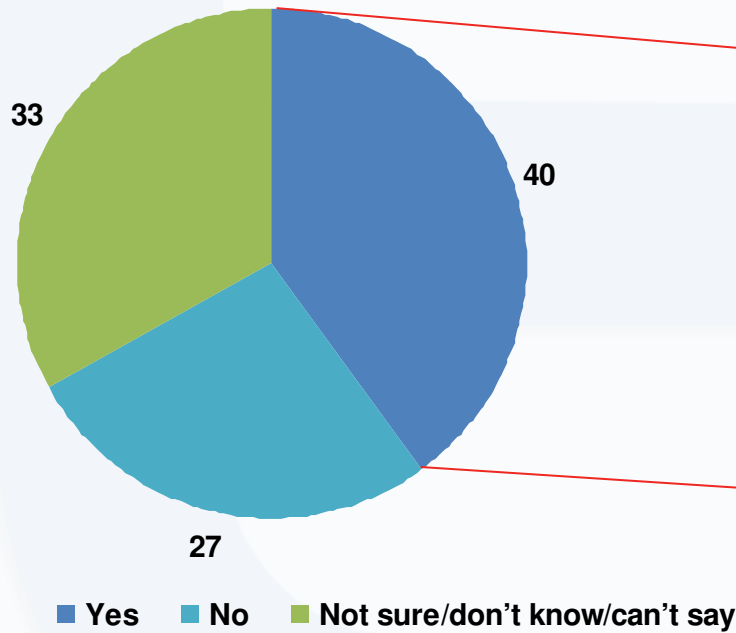


Number of jobs expected to be lost

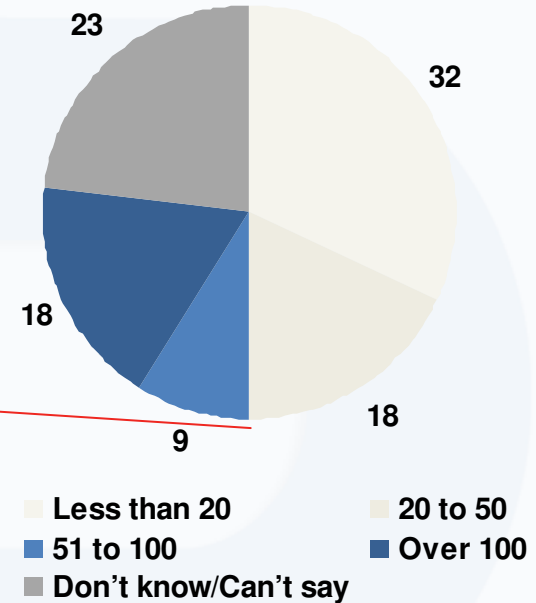
- 40% believe there are still more redundancies expected to be announced in their companies.

Q: Do you expect any job cuts in your company in the future?

Q: How many employees of your company do you expect will lose their jobs?



Base: Total Working Sample : 10781



Base: Base: Those who expect any job cuts in their company in the future :4365

Current Hiring

- Although most companies who have cut jobs or are expected to cut jobs haven't taken on any new staff, there are quite a few companies who have hired a few additional staff seeming to indicate that they have used the crunch to cut non productive members of staff and rehire more prudently for a few positions.

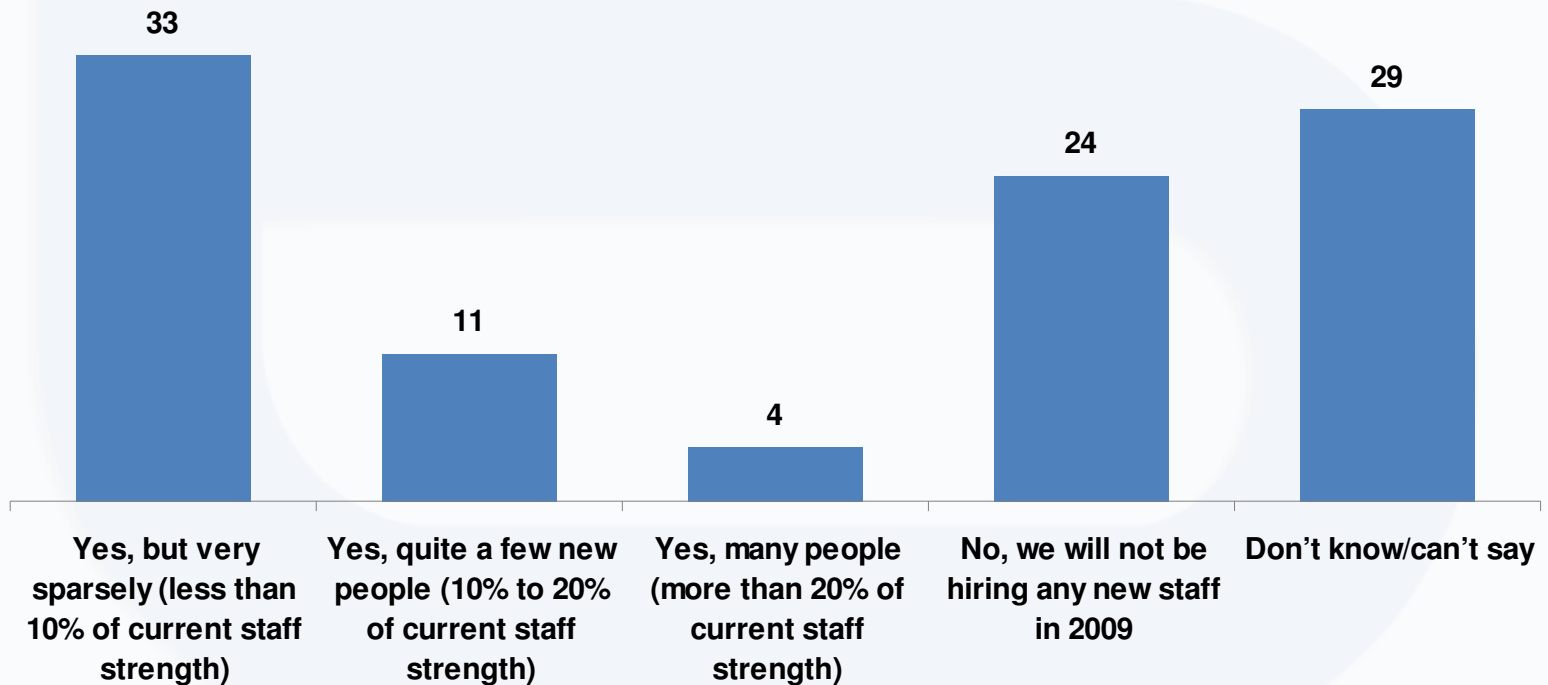
Q: Is your company currently hiring new staff?

Is your company currently hiring new staff?	Have there been any job cuts in your company?				Do you expect any job cuts in your company in the future?		
	Total	Yes	No	Not sure/don't know/can't say	Yes	No	Not sure/don't know/can't say
Yes, but only for a very small number of positions (less than 10% of current staff strength)	31	29	34	31	29	35	31
Yes, for quite a few positions (10% to 20% of current staff strength)	9	6	11	7	6	13	9
Yes, for many positions (more than 20% of current staff strength)	4	2	5	4	2	6	4
No, we are not hiring any new staff currently	43	53	38	33	55	33	37
Don't know/can't say	13	9	12	26	8	13	19

Hiring in 2009

- Slightly over half the respondents are either unsure of whether their companies will be hiring or feel they will not be doing so.
- 33% feel their companies will open up a few positions indicating that although hiring is slow, there are a few vacancies available.

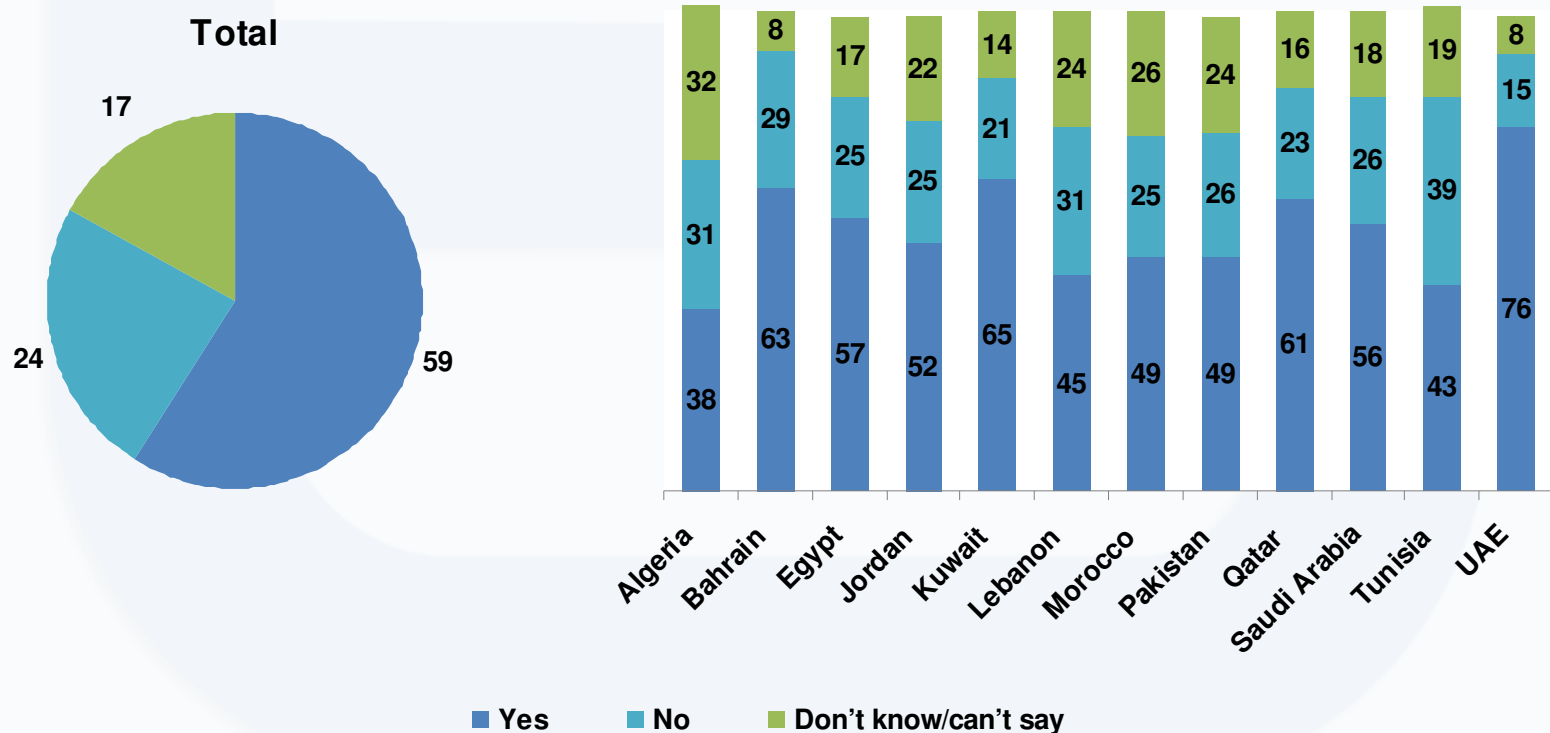
Q: Do you expect your company will be hiring in 2009?



Ripple Effect

- Overall, almost 6 in 10 people know of someone who has lost their job due to the recession.
- In the UAE, this figure is the highest at over three quarters of the respondents – clearly fuelling the worry.

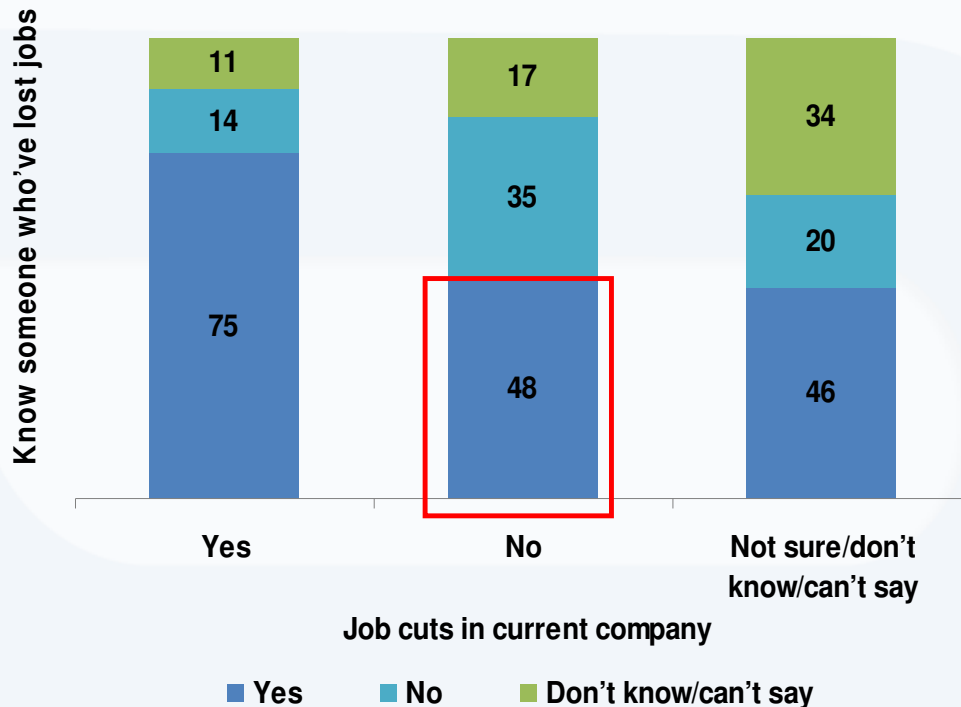
Q: Apart from your current work colleagues, do you personally know any others who have lost their jobs in the last few months like your friends, neighbors, ex colleagues, relatives?



Ripple Effect

- Even amongst those who had not witnessed any job cuts in their own companies, close to half (48%) knew someone externally (out of their workplace) who had lost their job.

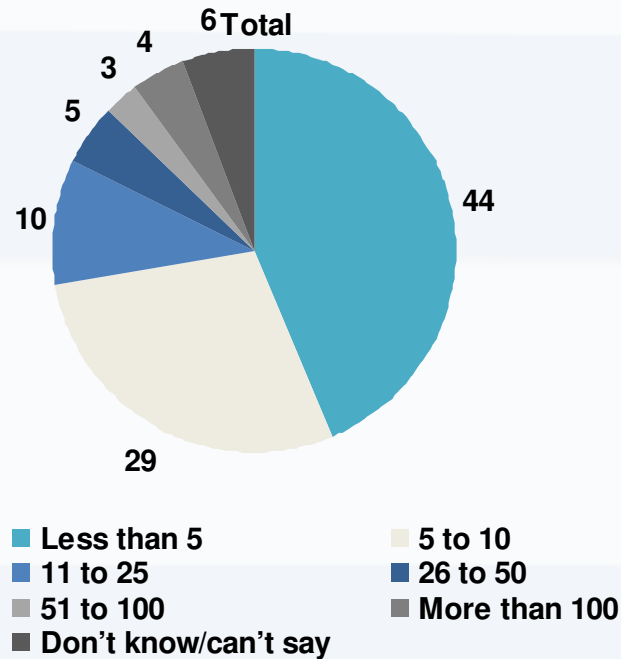
Q: Apart from your current work colleagues, do you personally know any others who have lost their jobs in the last few months like your friends, neighbors, ex colleagues, relatives?



How many people do you know who've lost jobs?

- Majority know less than 5 people who have lost jobs.

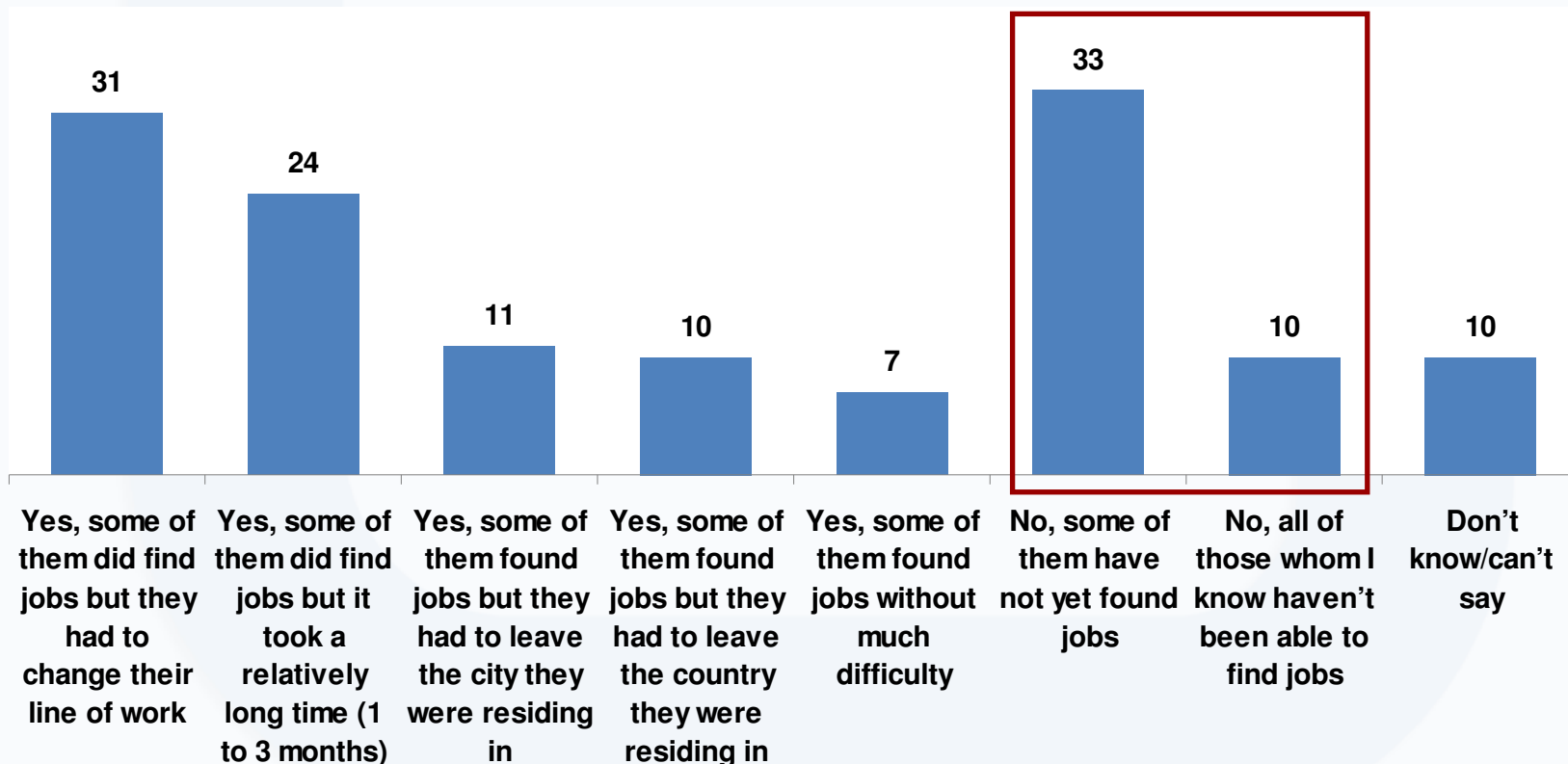
Q: Among those you know personally, how many people have lost their jobs in the past 9 months?



Ability to find a job after being made redundant.

- 43% of those who know people who've lost jobs say at least some haven't managed to find work.

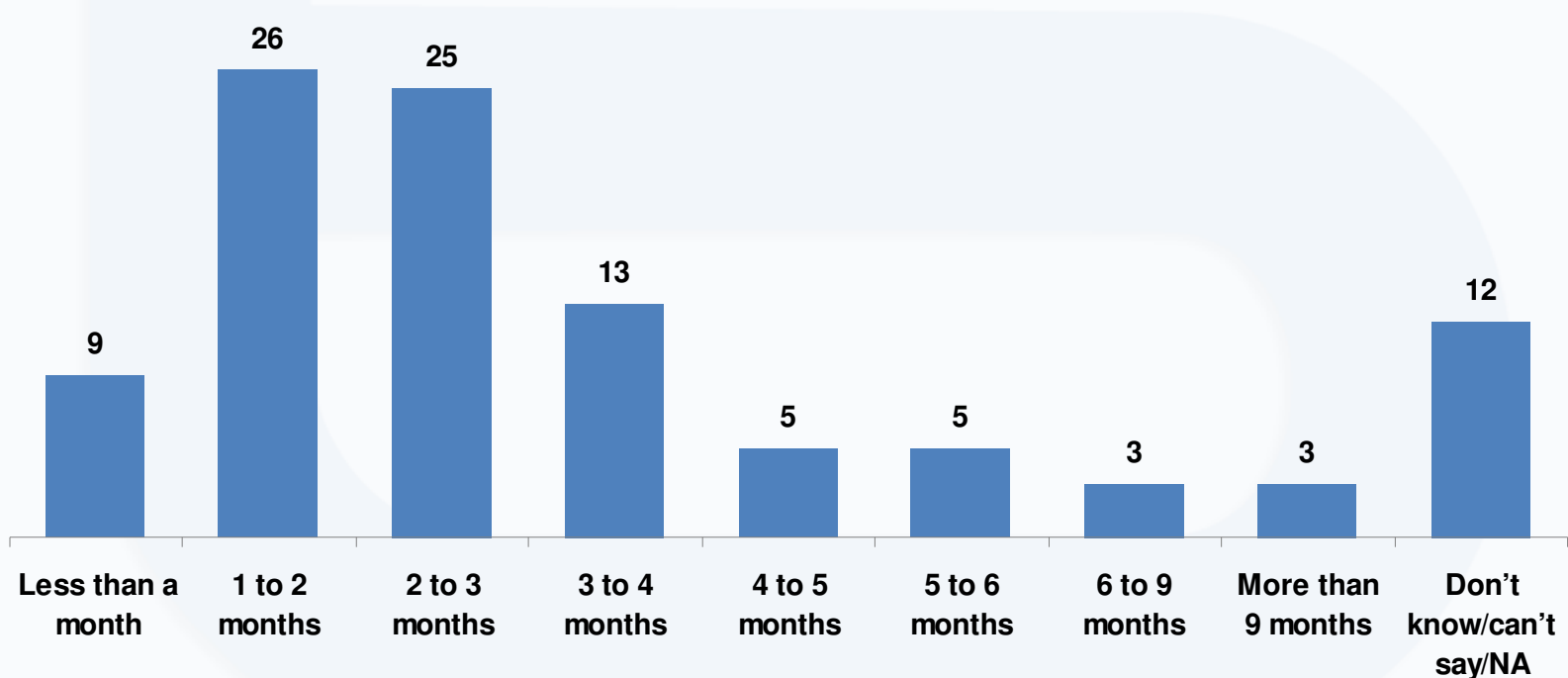
Q: Have they been able to find jobs?(Please select all that apply)



Time period taken to find alternative work

- For those lucky enough to find jobs in the current scenario after being laid off from their previous jobs, the average duration has been between 1 and 3 months for the majority which is not too bad.

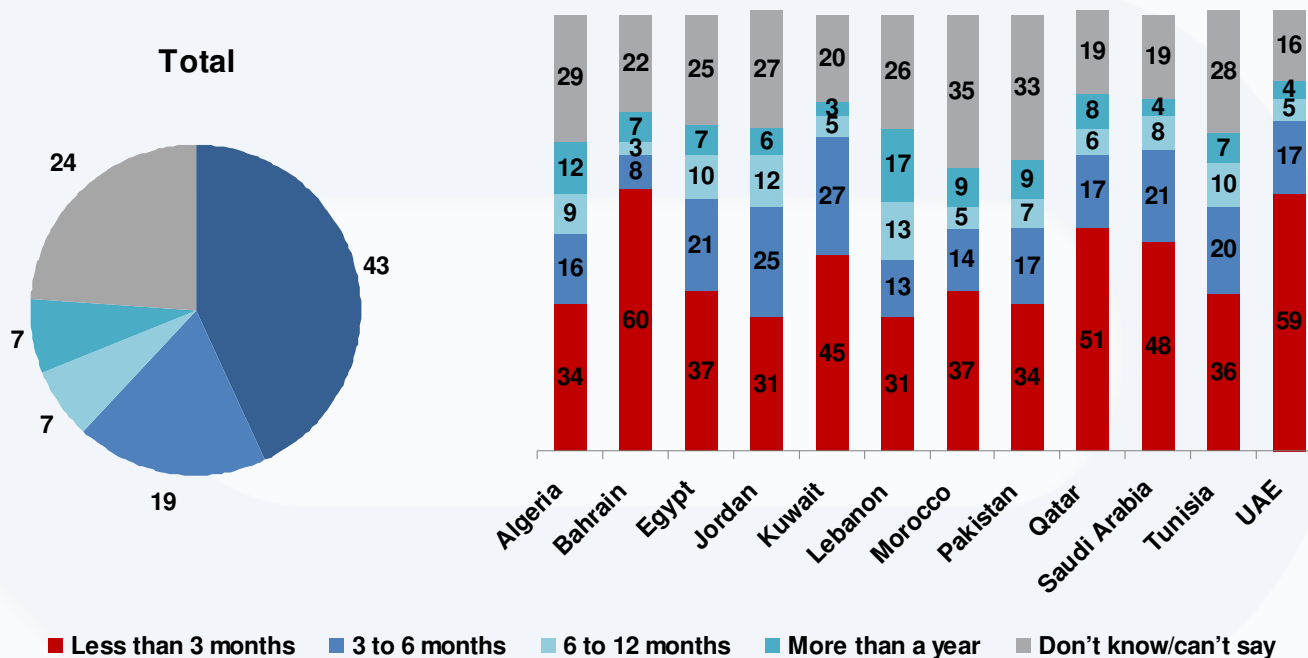
Q: How long has it taken them to find jobs? If there are different time periods for each of those you know, please select an average time period



Duration of stay without a job

- If jobs are lost, 43% of people would not stay in their country of residence for more than 3 months. This on its own is quite alarming. Luckily figures seem to indicate most have been able to find alternative work in 1 to 3 months (see previous chart).
- Due to the cost of living, Bahrain (60%) and UAE (59%) will be the worst hit by the exodus out of the country.

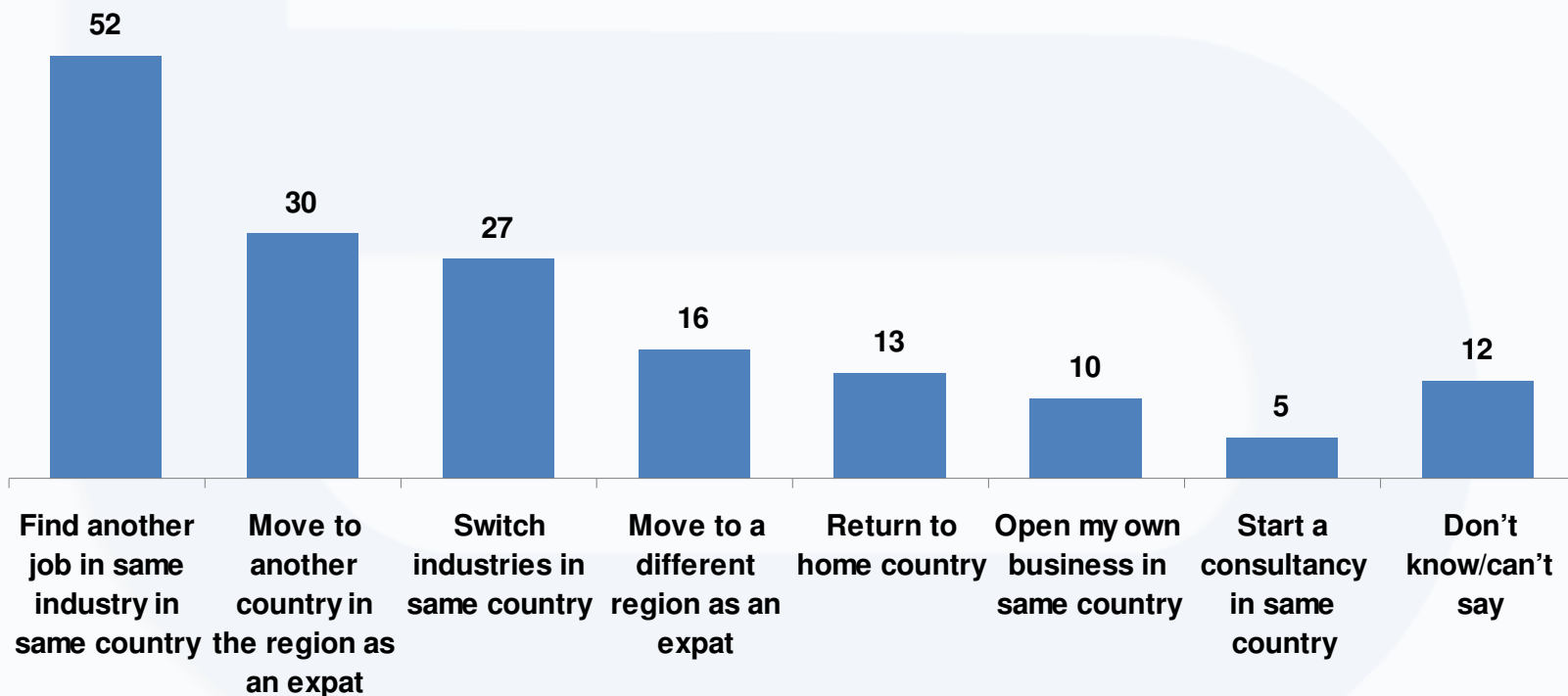
Q: If, unfortunately, you were to lose your job or your business, how long do you expect to stay in your present country of residence till you find an alternative employment or business opportunity?



Potential alternatives to job loss

- More than half would attempt to find a job in the same country in the same industry. The scenario however clearly indicates that they would also keep their other options open.

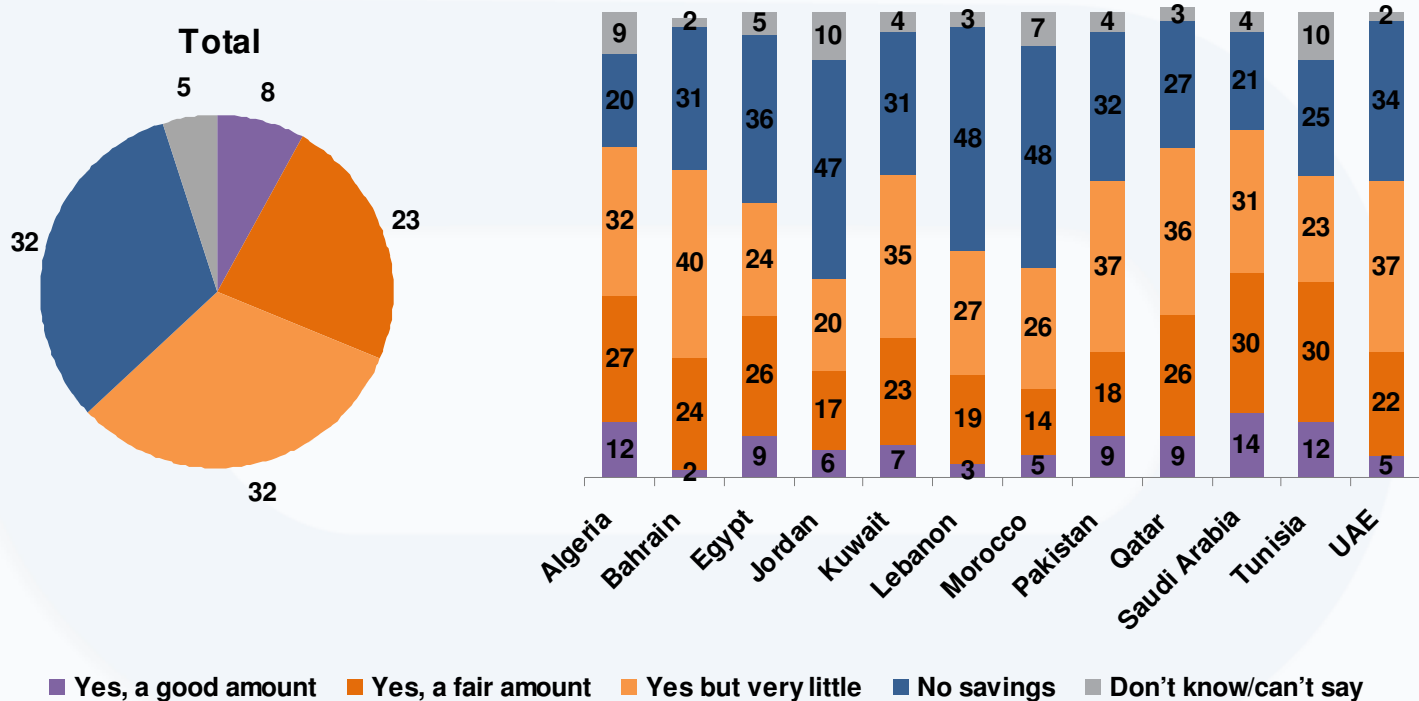
Q: In case of your job loss, which of the following would be your potential alternatives? Please select all that apply:



Savings to survive a rainy day

- Lebanon, Morocco and Jordan will be most hit if there are many job losses as close to half do not have any savings to back them up.

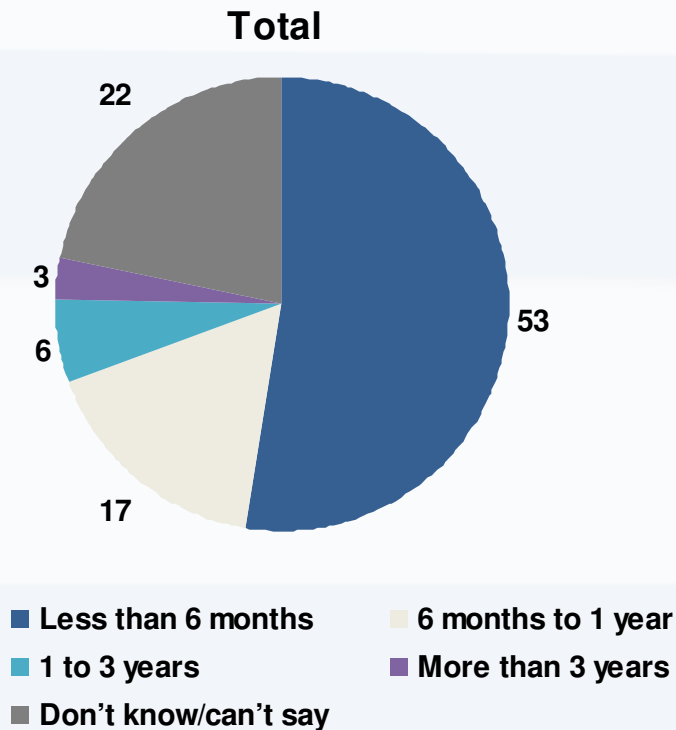
Q: Have you been able to save money through your past employment in this country which you are currently residing in?



Duration of savings sustaining

- 53% would only be able to survive for a maximum of 6 months should they be out of a job.
- In the UAE (62%), Bahrain (60%) & Kuwait (59%), this figure is slightly higher.

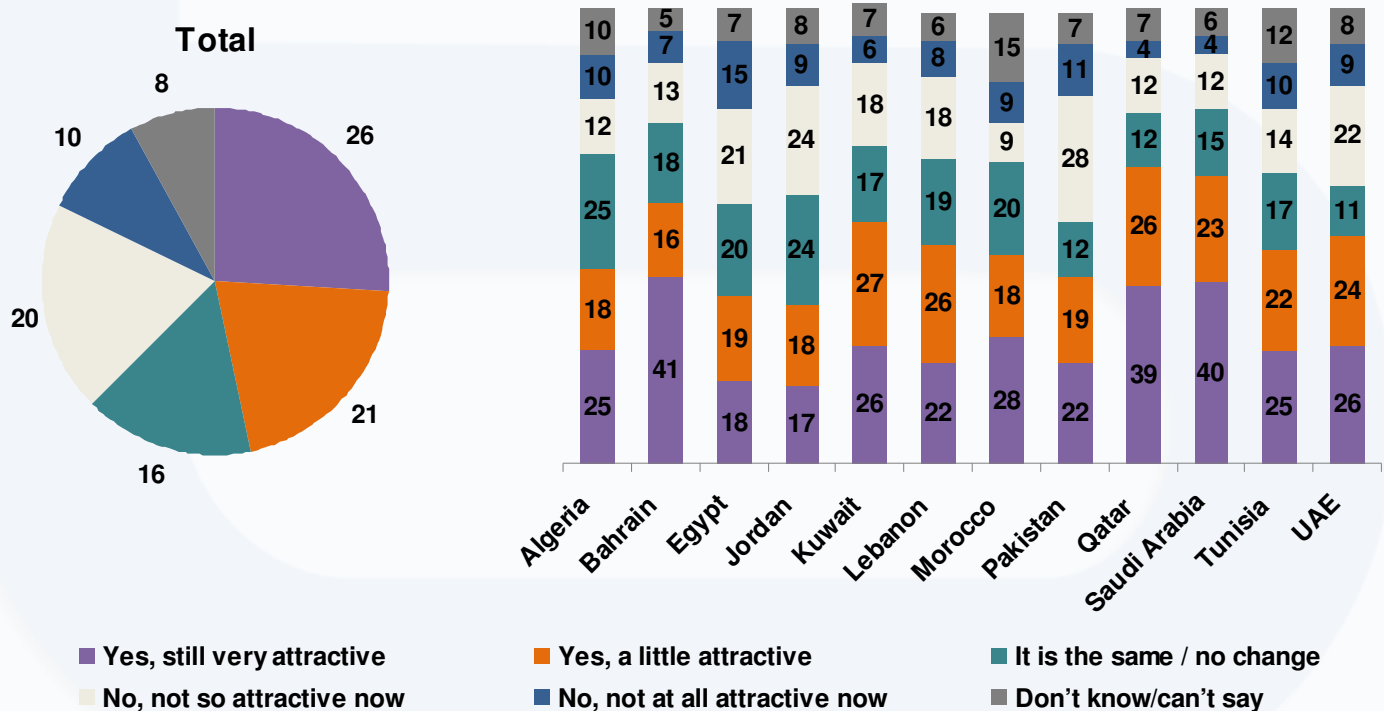
Q: How long do you anticipate your savings can sustain you if necessary in case of a job loss or such situations?



Country of residence attractiveness

- Qatar & KSA strongly believe their countries are still very attractive.
- Egypt, Jordan & Pakistan are almost equally polarised in their opinions of their country.

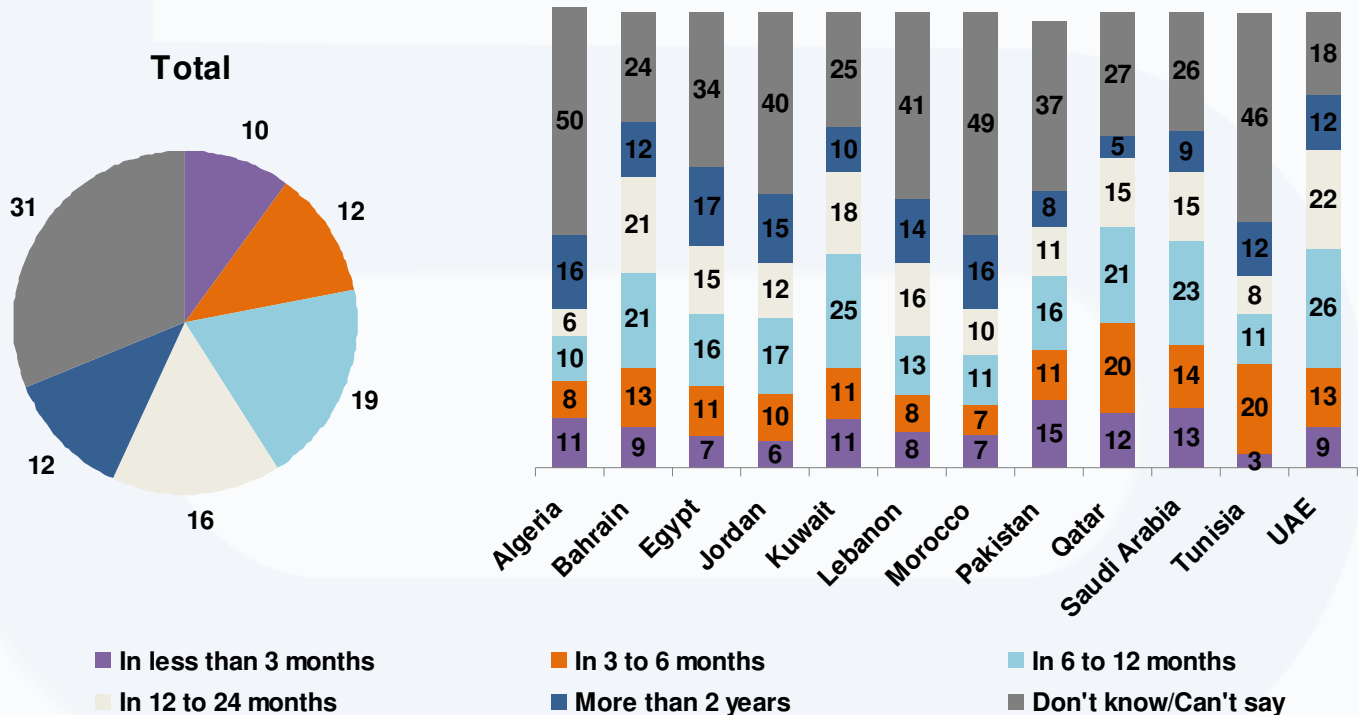
Q: Is your country of residence still a lucrative and attractive place to live and work?



Anticipated job market improvements

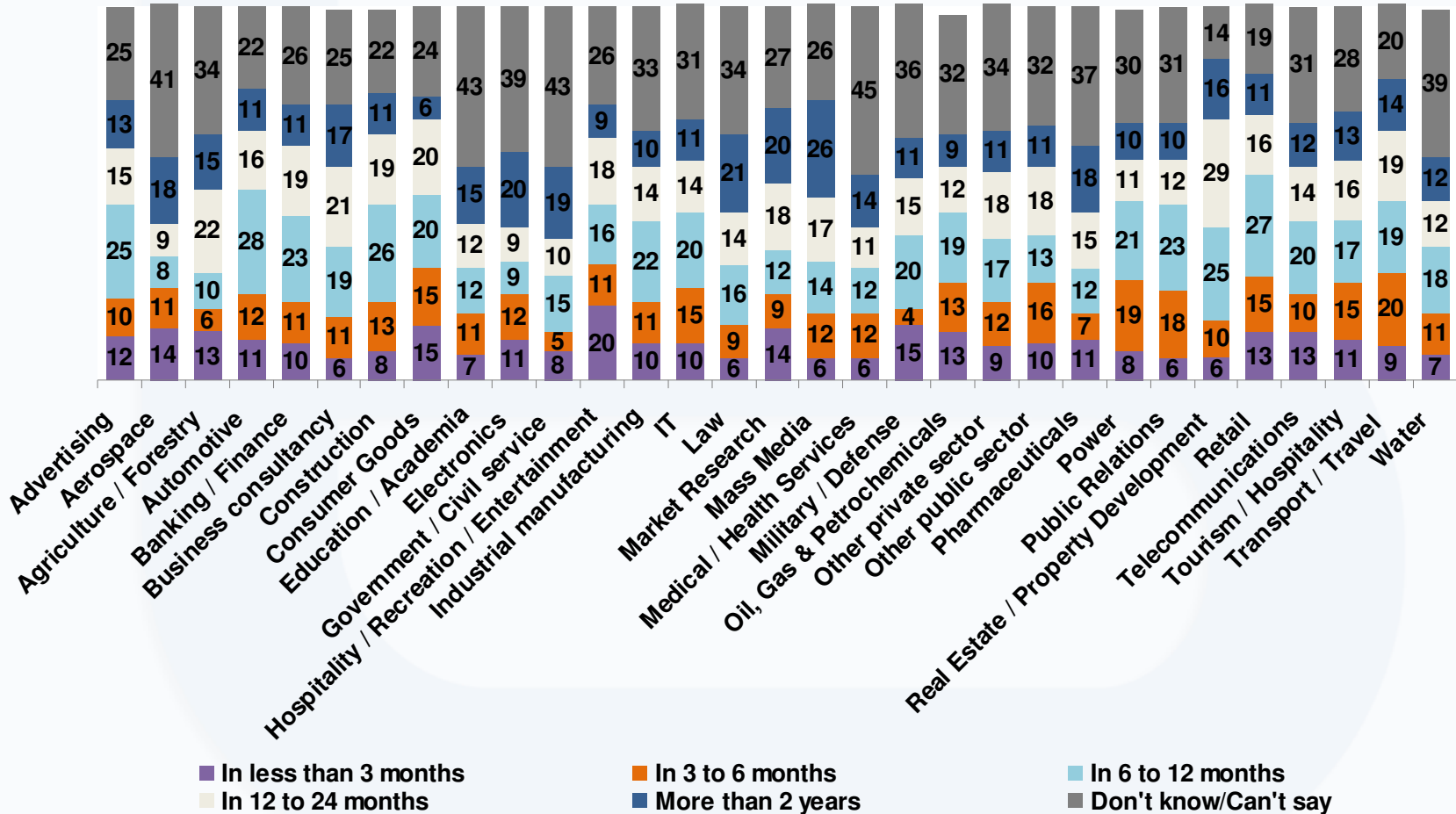
- Qatar was most optimistic it will recover in a very short while (up to 12 months timeframe).
- Clearly residents of the UAE showed a strong faith in their country– whilst some felt it may take time for the economy to rebound, the fewest number of people (18%) felt they were unsure of *when* it would turnaround.

Q: When do you anticipate the regional job market will improve in your industry?



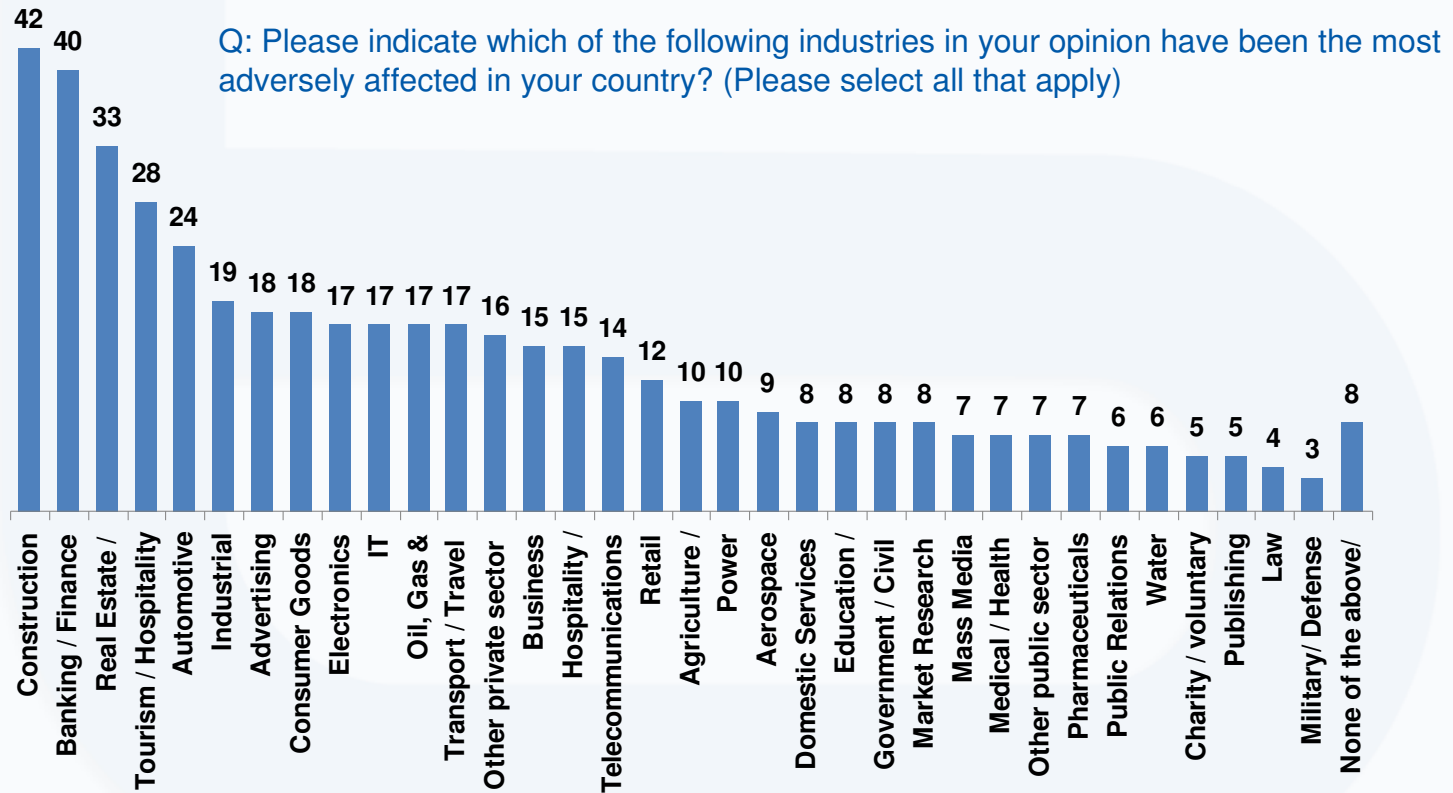
Anticipated job market improvements – by industry

Q: When do you anticipate the regional job market will improve in your industry?



Industries most adversely affected

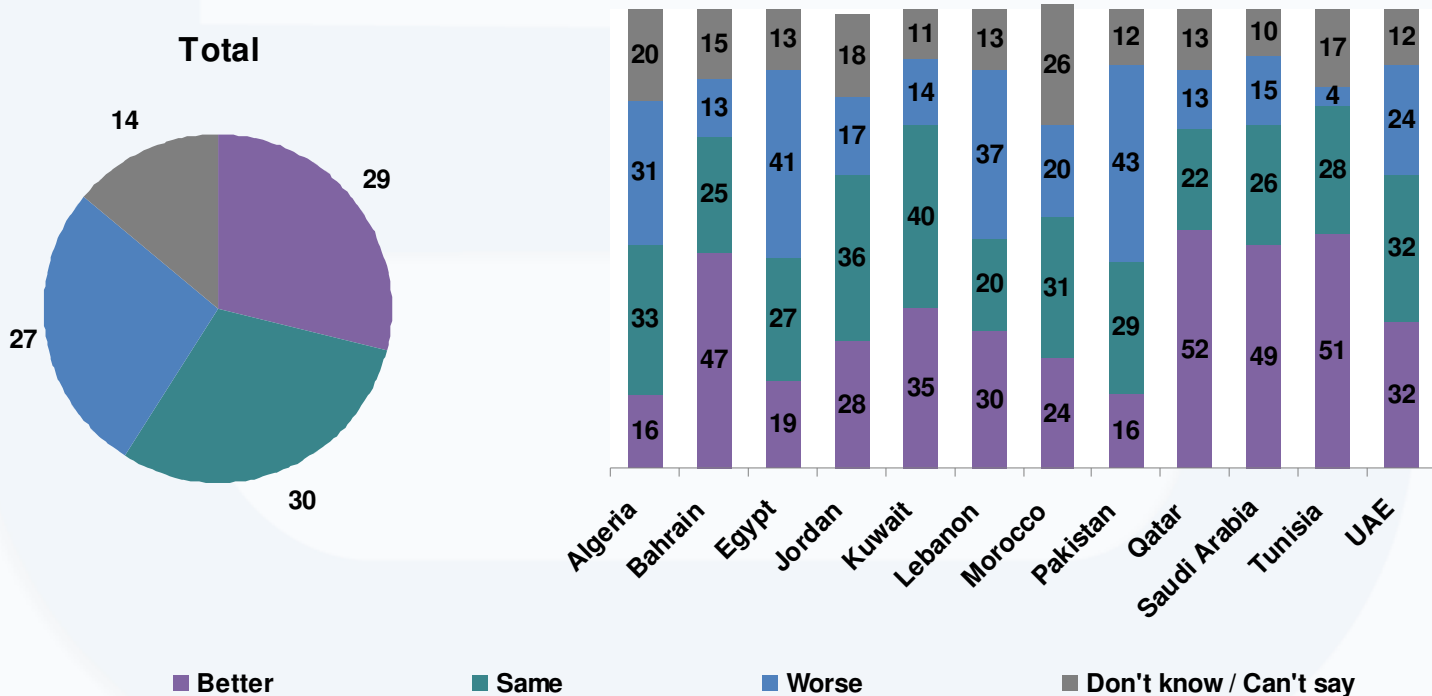
- Construction, Banking / Finance & Real estate / property are seen to be the most adversely affected.



COR confidence at a regional level

- Pakistan and Egypt are by far the most negative about the state of economical competitiveness when compared at a regional level.
- Qatar very positive about their ability to beat the odds regionally.

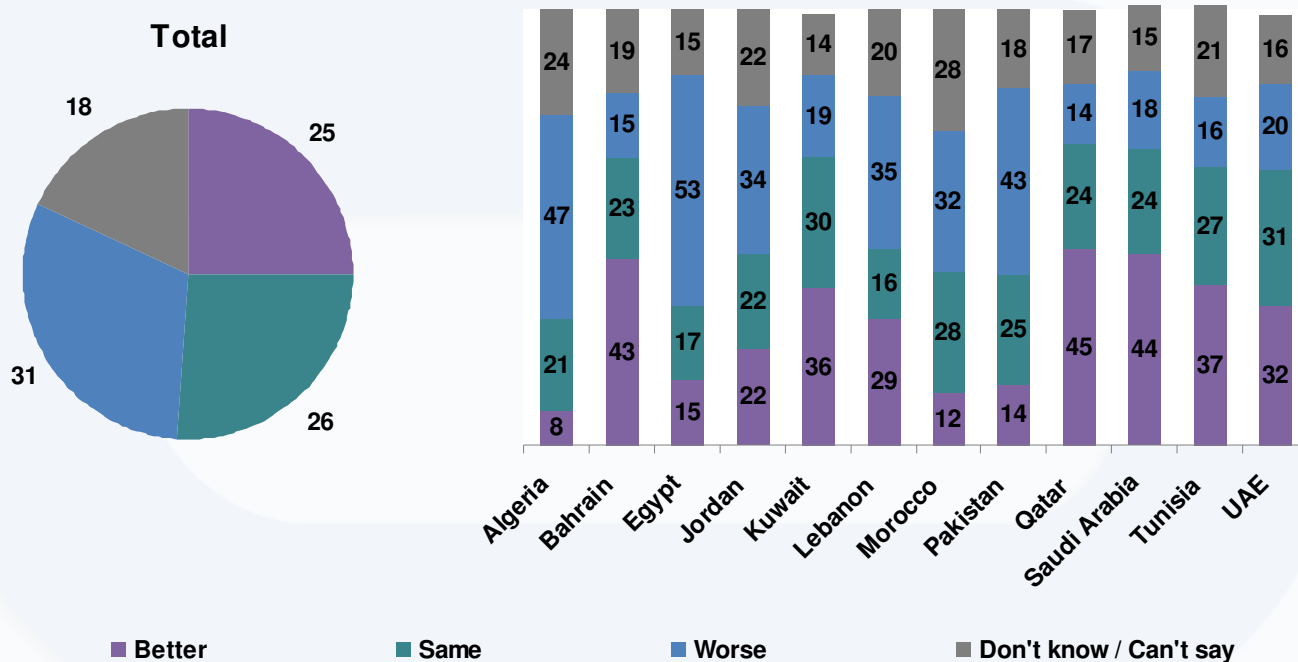
Q: How do you feel your country is faring economically relative to other countries in the region?



COR confidence outside the regional level

- Egypt, Algeria & Pakistan don't think they are performing well economically compared to countries outside the region.
- Qatar, KSA & Bahrain very positive about their comparative performance.

Q: How do you feel your country is faring economically relative to other countries outside the region?



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