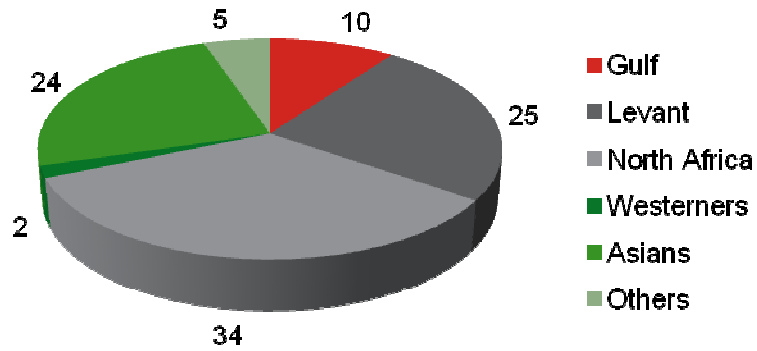


# Bayt.com Middle East Salary Survey

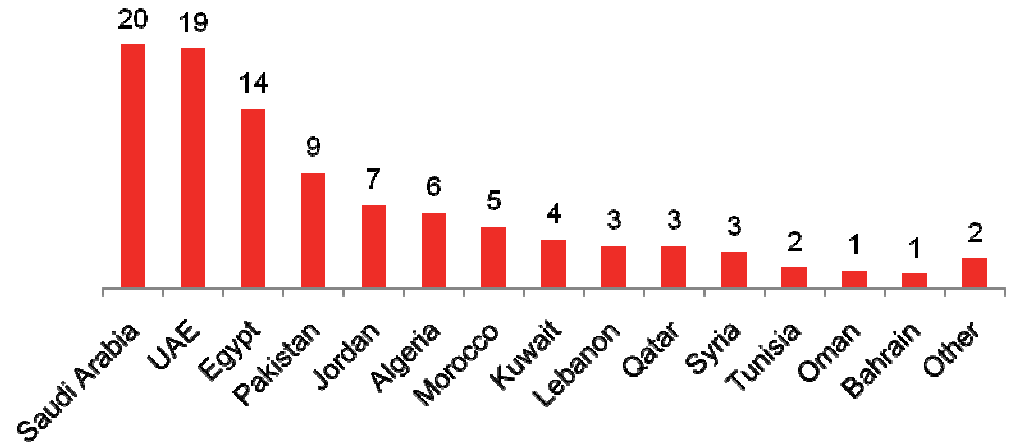
February 2011

# Demographics

## Nationality Group

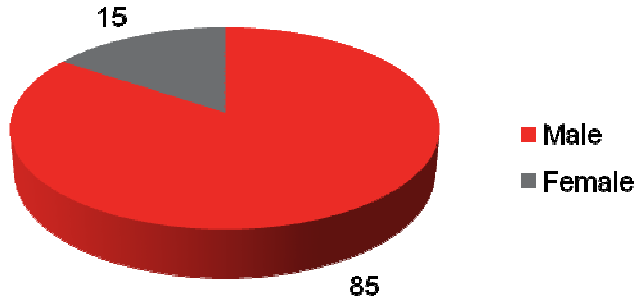


## Country of Residence

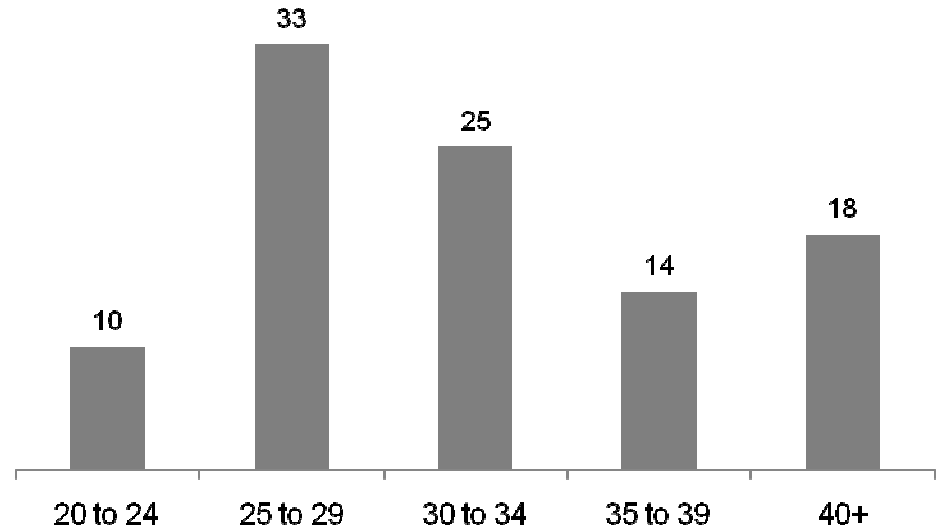


Base: Total (8,565)

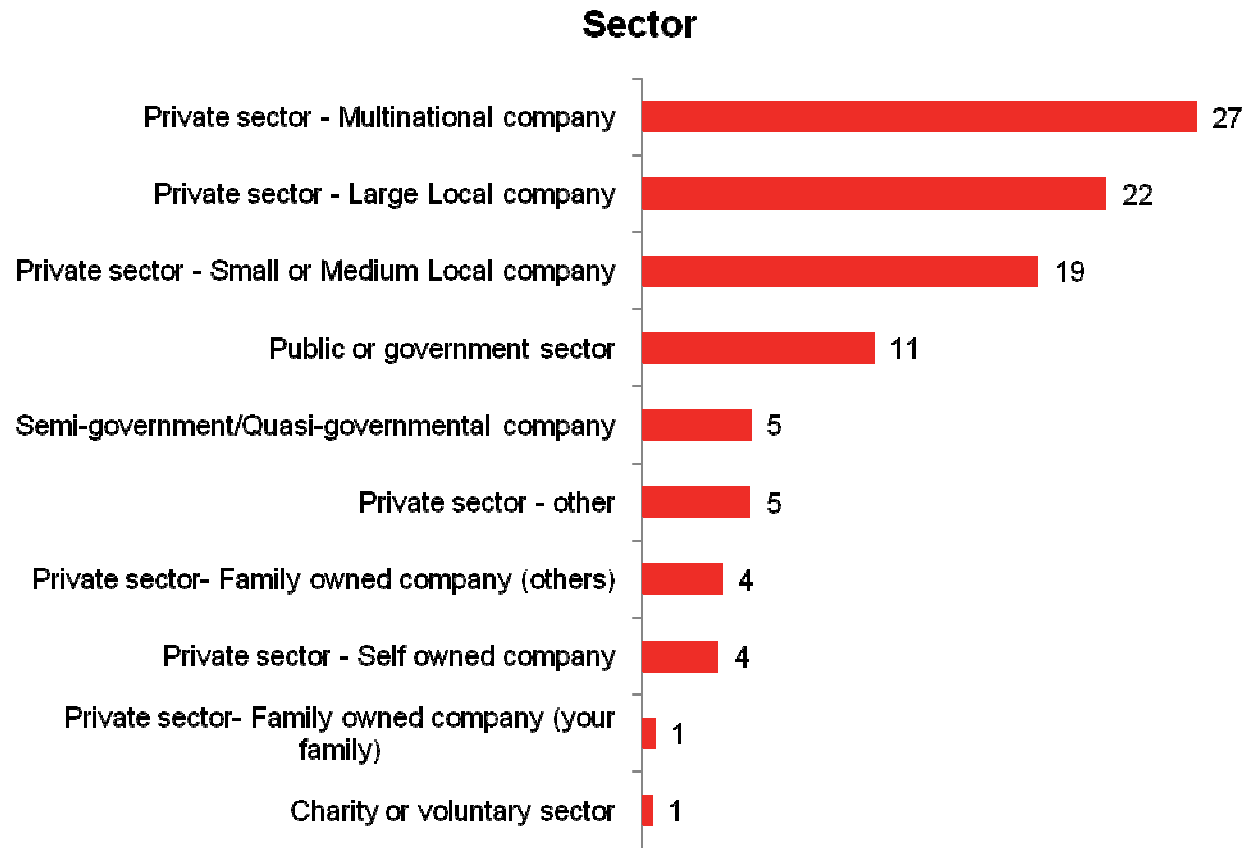
## Gender



## Age

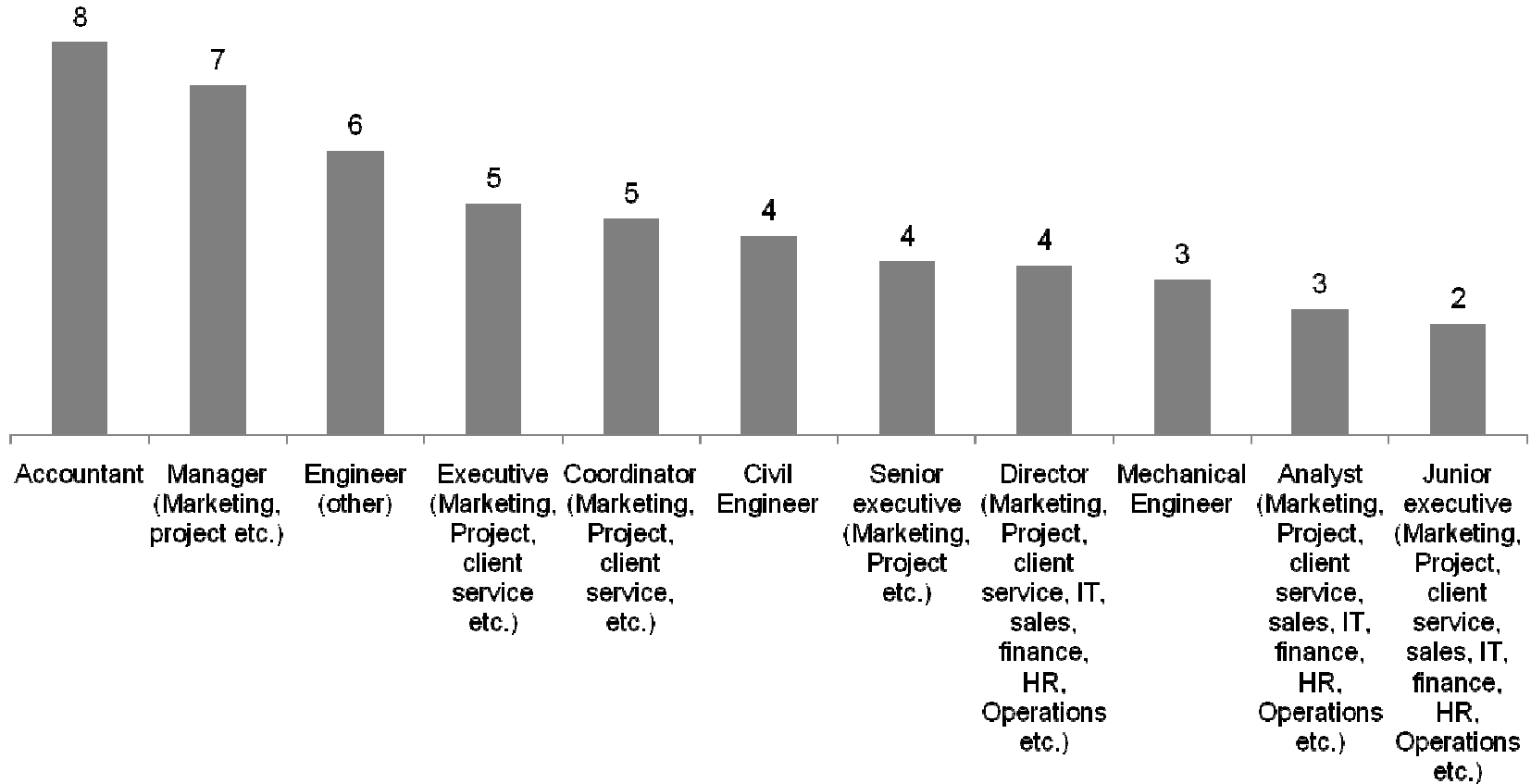


Base: Total (8,565)



Base: Total (8,565)

## Position



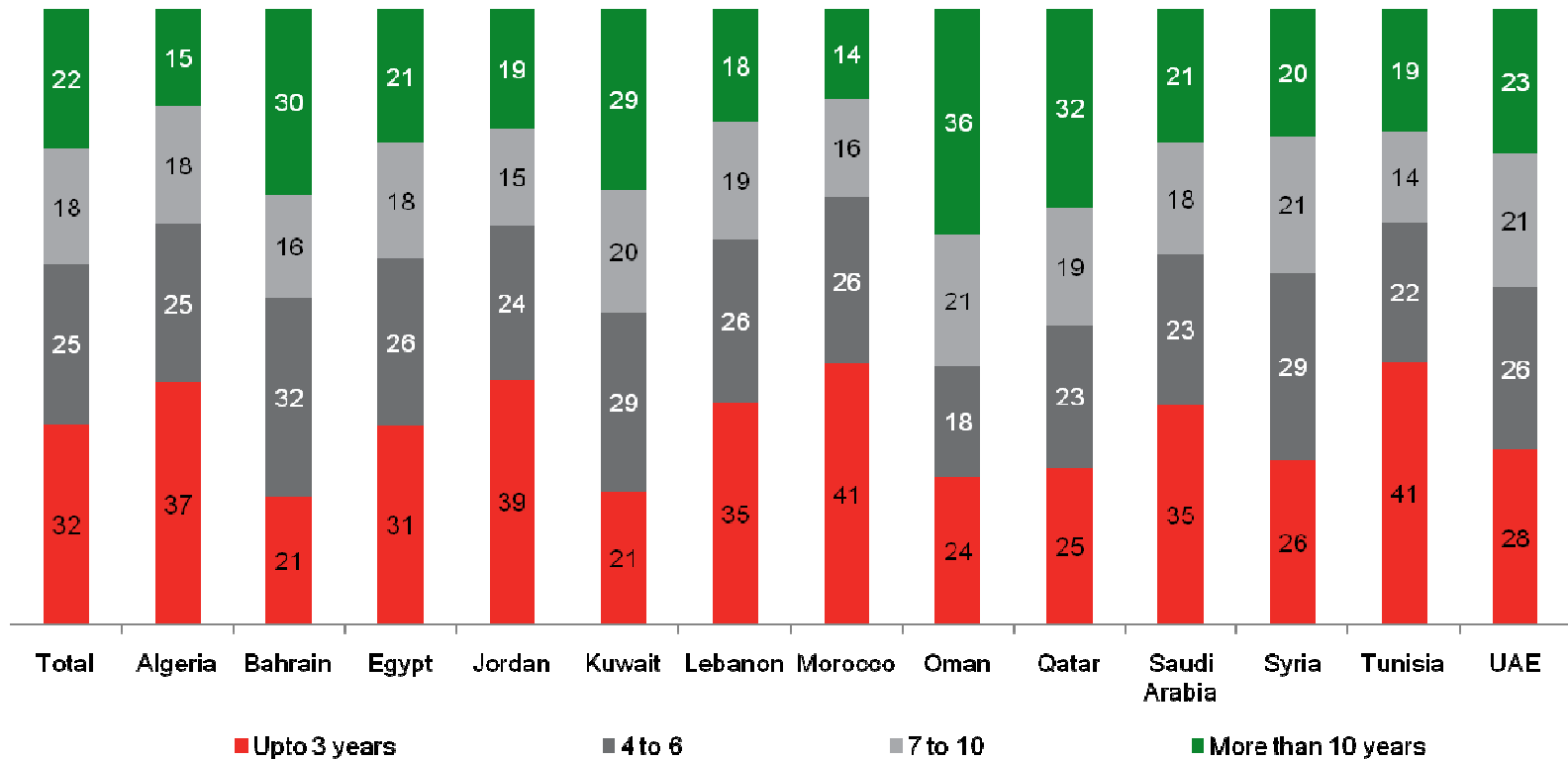
Base: Total (8,565)

# About the respondents

## Number of years of service in the present career path

- Oman, Qatar and Bahrain have a senior talent pool in comparison to countries like Tunisia, Morocco and Jordan that report a younger workforce.
- Recent economic boom in Qatar is a major factor in attracting senior expatriate workforce.

Q: Can you please tell us the total number of years you have been working in your current career path?



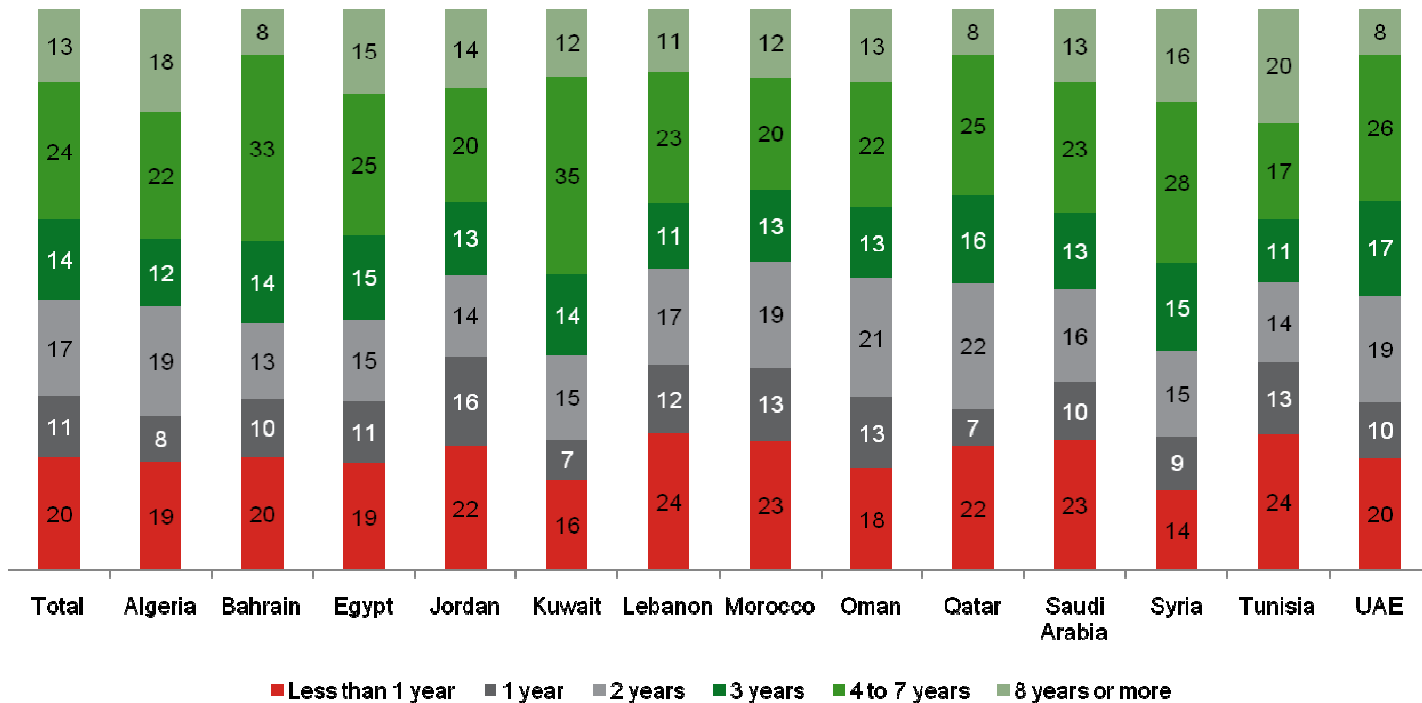
Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)



# Number of years working with the current employer

- **Kuwait (35%)** has a higher percentage of respondents who have stayed longer with their current employer, relative to other countries.
- Higher number of people claiming to be new in the job, indicates the creation of new jobs in the last one year.

Q: Can you please tell us the total duration you have been working with your current employer?

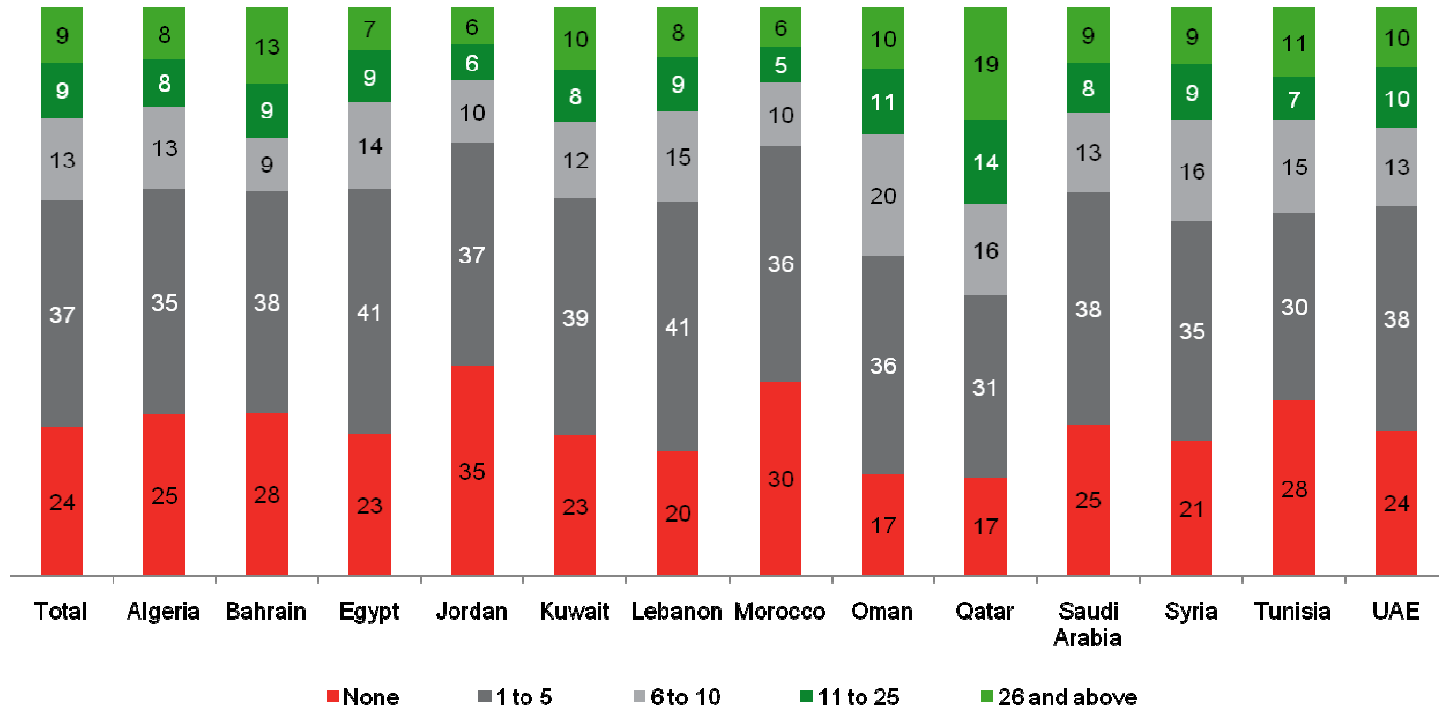


Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

# Number of People Reporting

- Respondents from Qatar, Jordan, Morocco and Tunisia have a larger pool to manage.

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

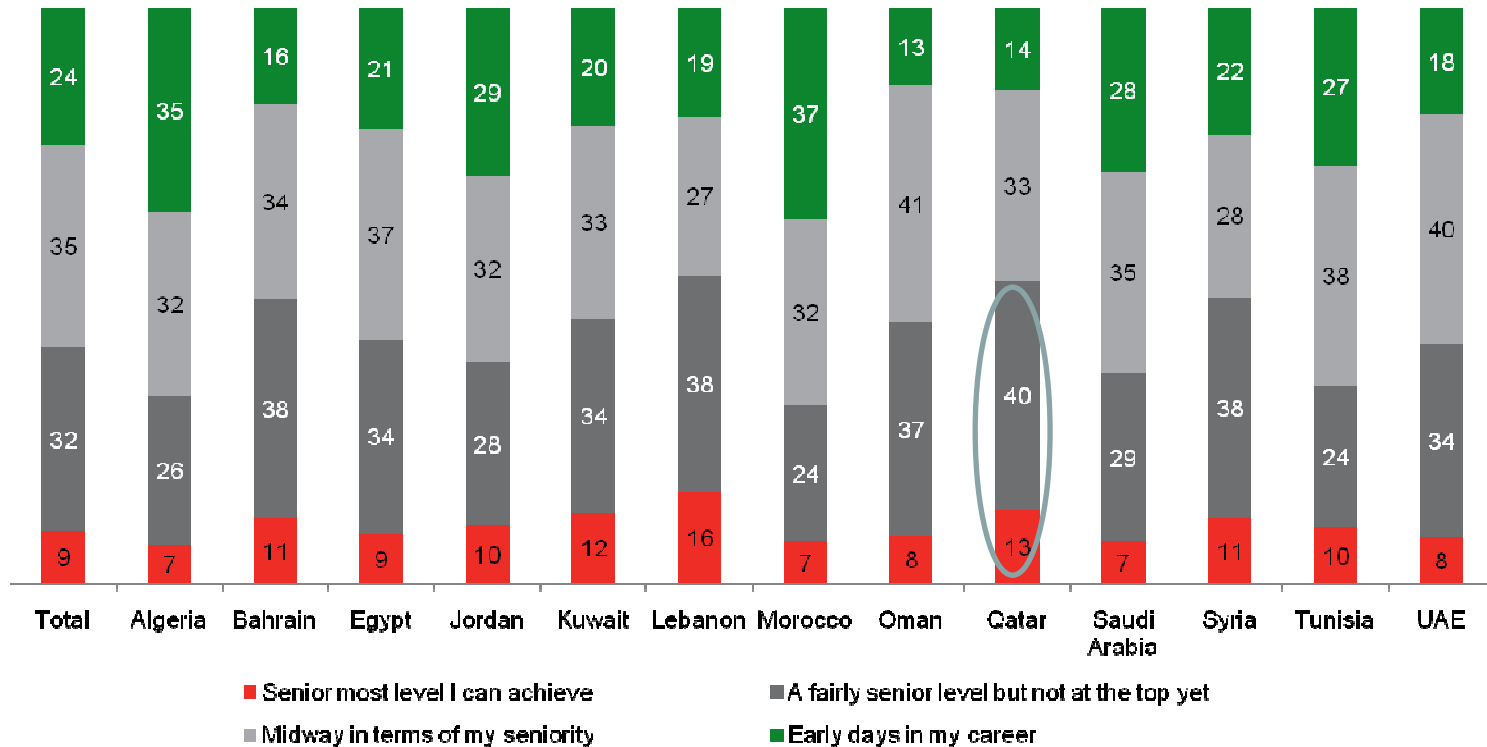


Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

## Position in Career Path

- **Qatar, reports a higher number of senior level employees.**
- **Oman (41%), UAE (40%), and Tunisia (38%) have higher percentage of respondents who claim they are Midway.**
- **Morocco (37%) and Algeria (35%) have relatively higher percentage of entry level respondents.**

Q: Can you tell us which of the following best describes the level you have attained so far within your career path?

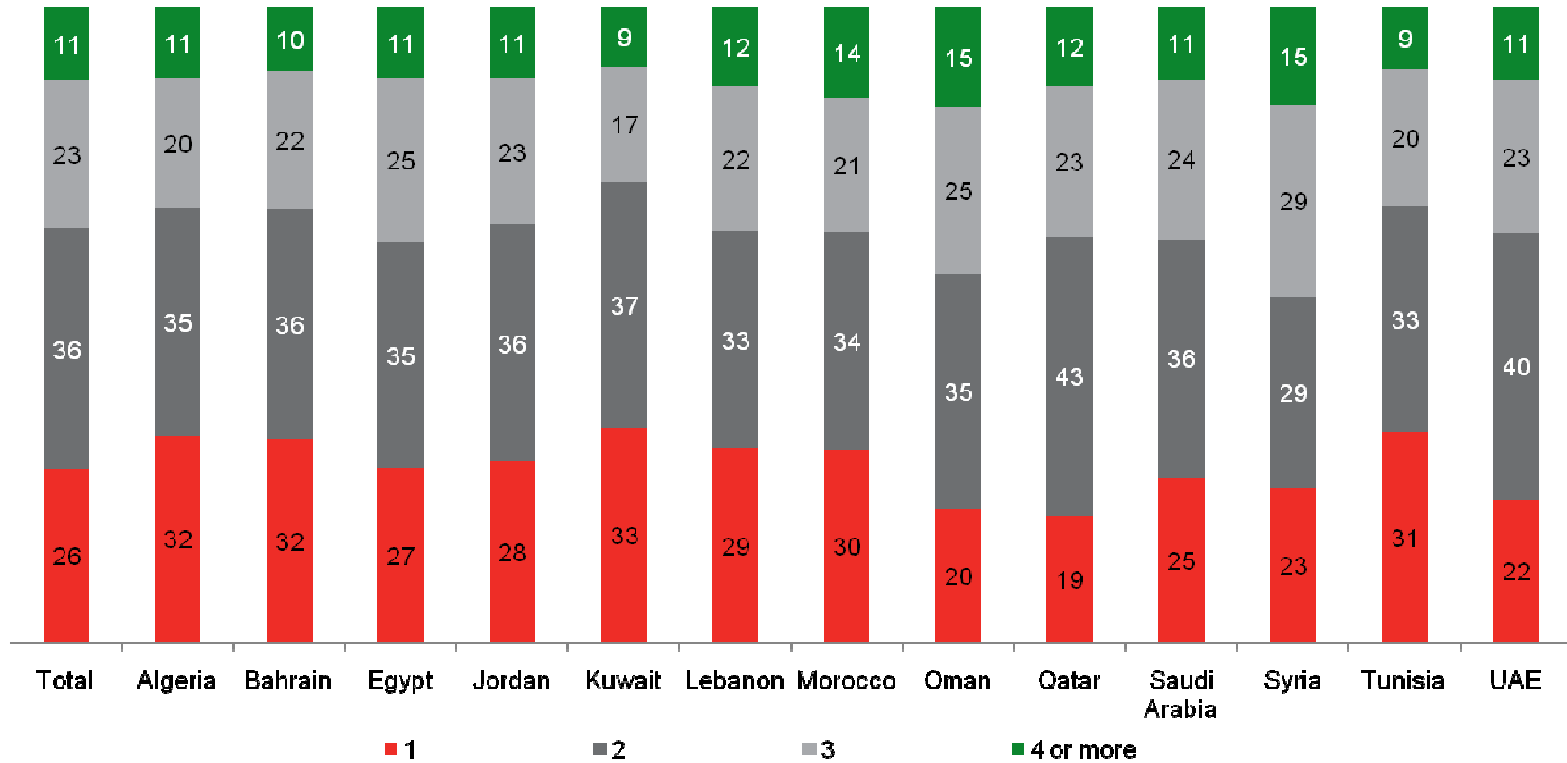


Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

# Number of Jobs Held

- UAE, Qatar and Oman exhibit higher employee turnover.

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

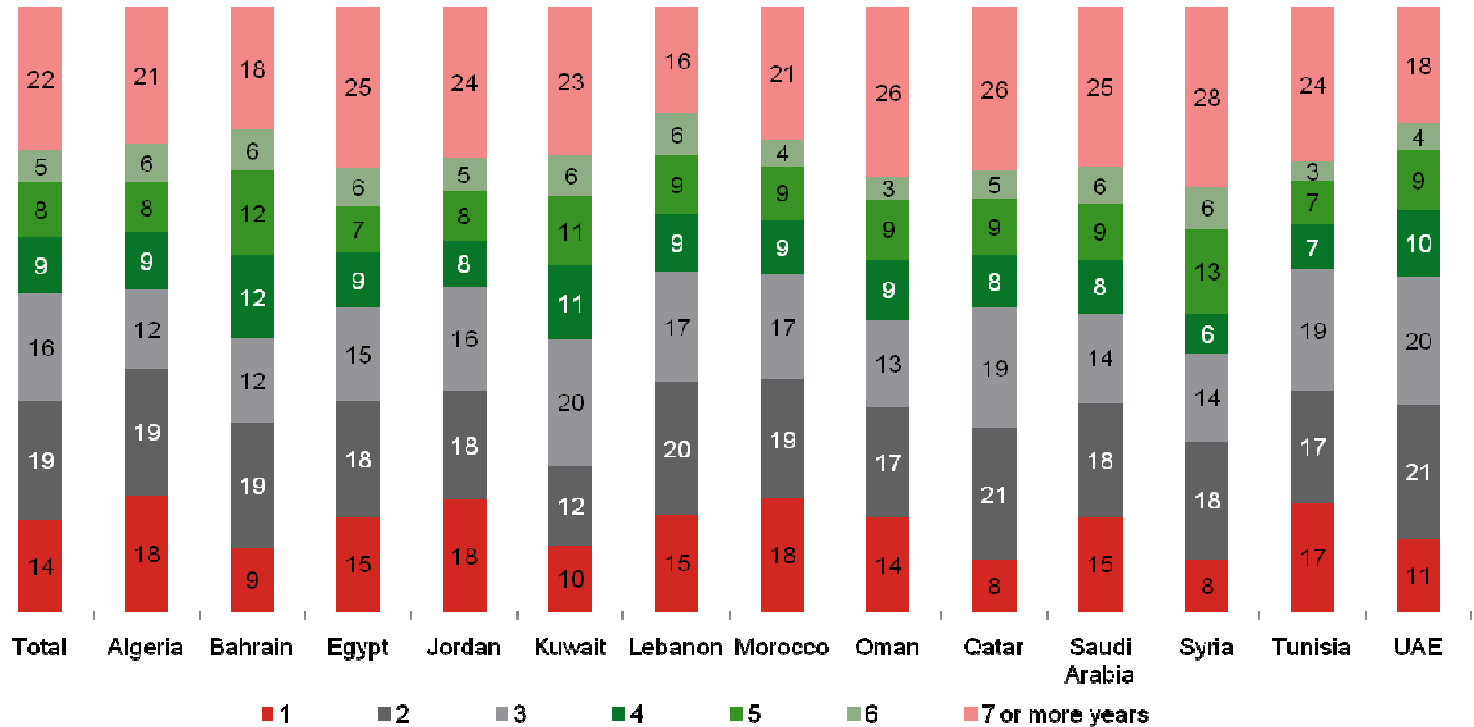


Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

# Average Tenure of a Job Held

- Average tenure of job held across markets is 5.2 years.
- Syria, Egypt and Kuwait exhibit higher than average tenure.
- Lebanon, UAE and Bahrain exhibit lower than average tenure.

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

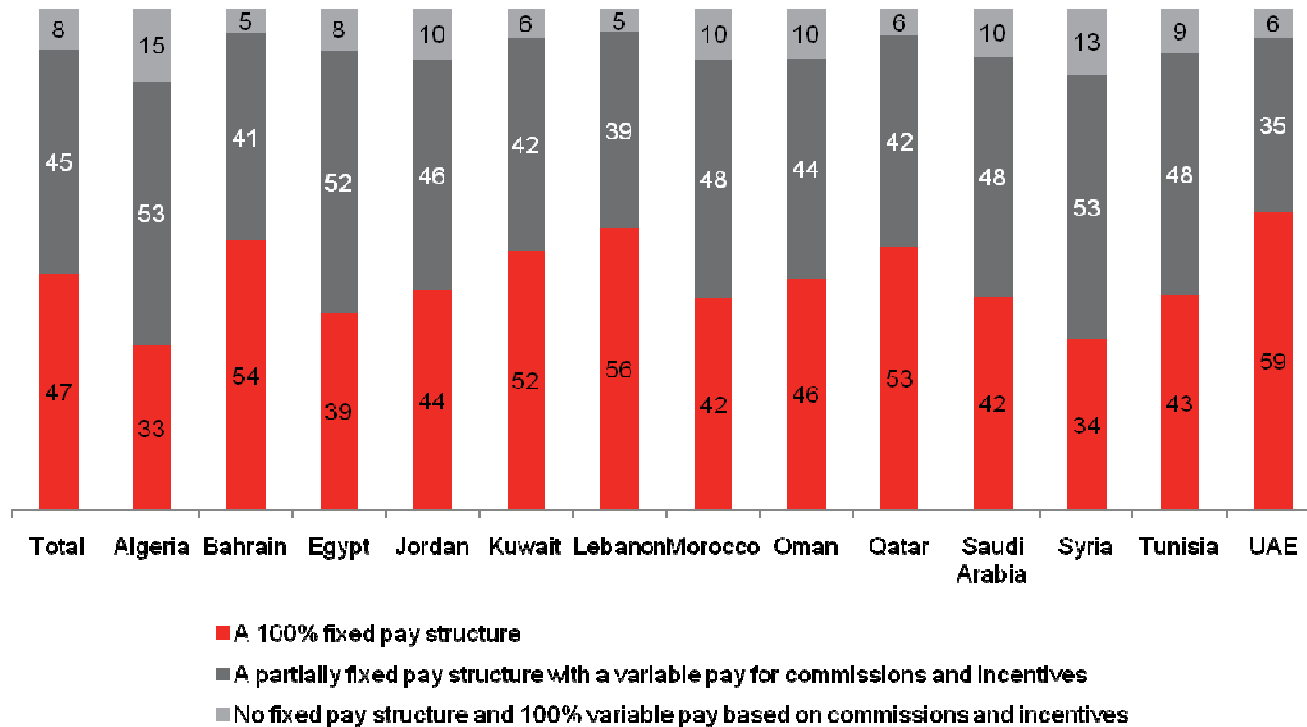


Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

# Preferred pay structure

- Markets with higher expat labor (UAE, Qatar, Bahrain,) show greater acceptance of fixed pay structure.
- Lebanon also shows higher preference for fixed pay structure, this could be a result of the economic scenario.

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

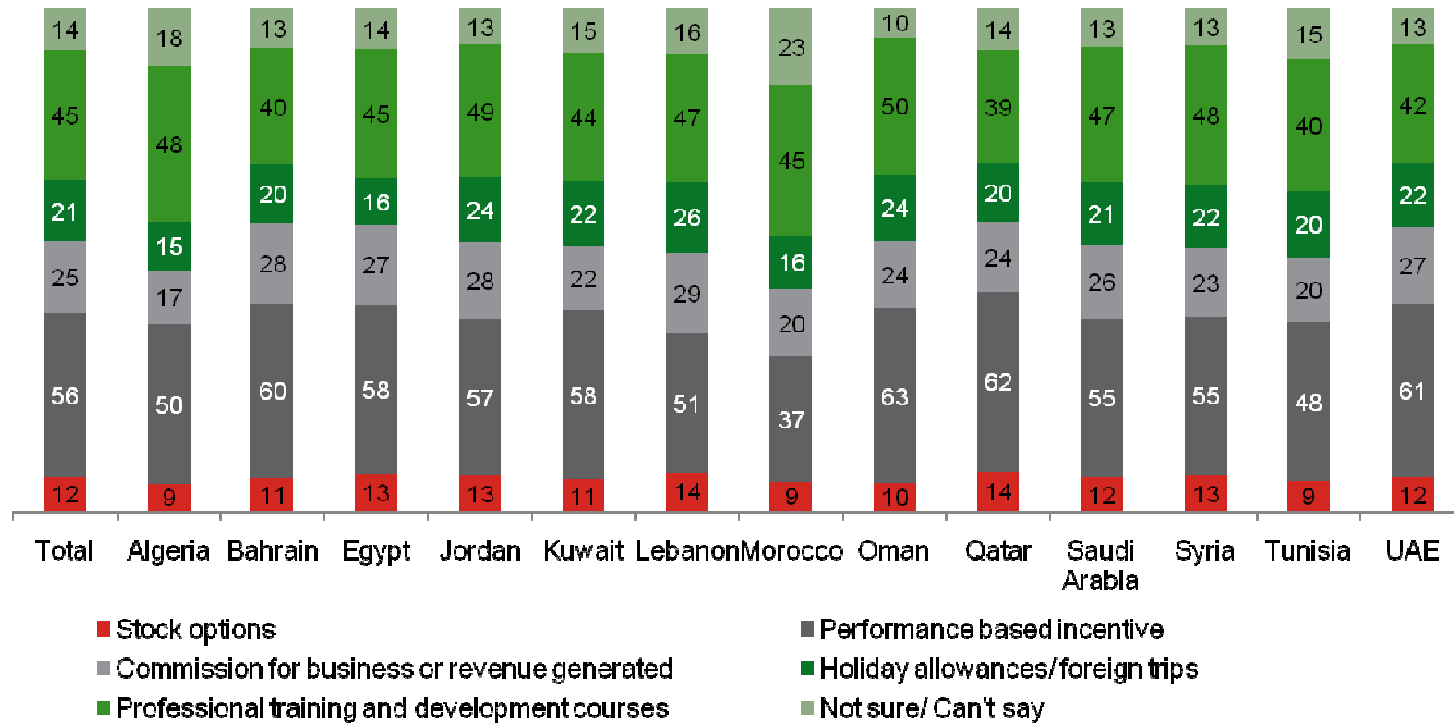


Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

# Additional Incentives

- Performance based incentive is the preferred incentive option, with 56% of the total population opting for it.
- In addition 45% also desire professional training and development courses.

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?



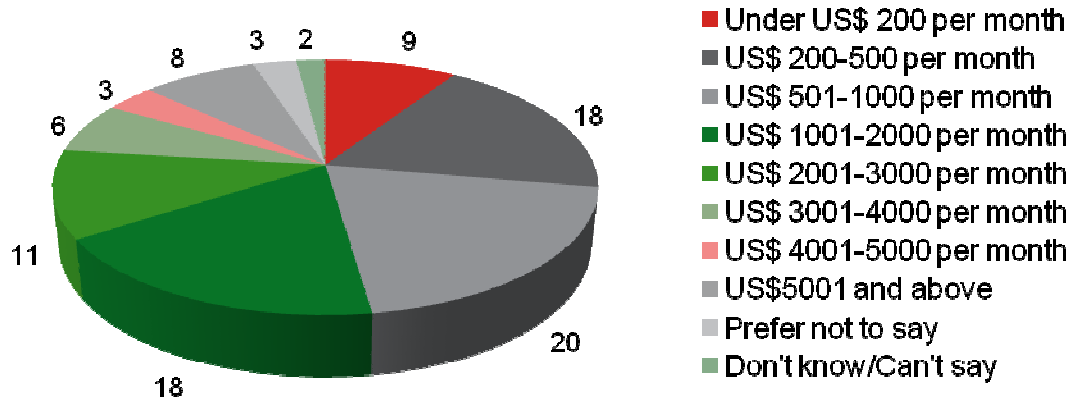
Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

# Current Package

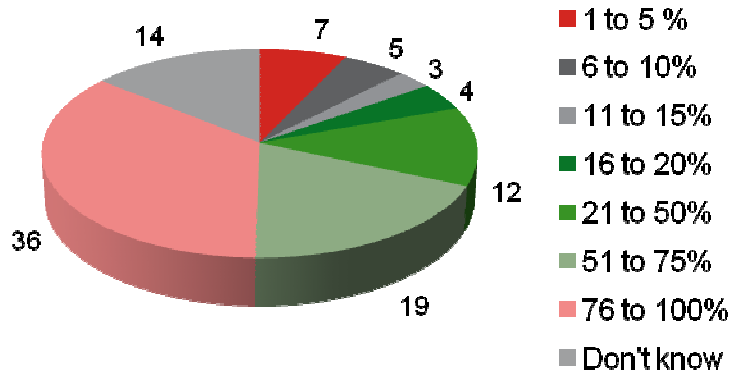


# Monthly Income

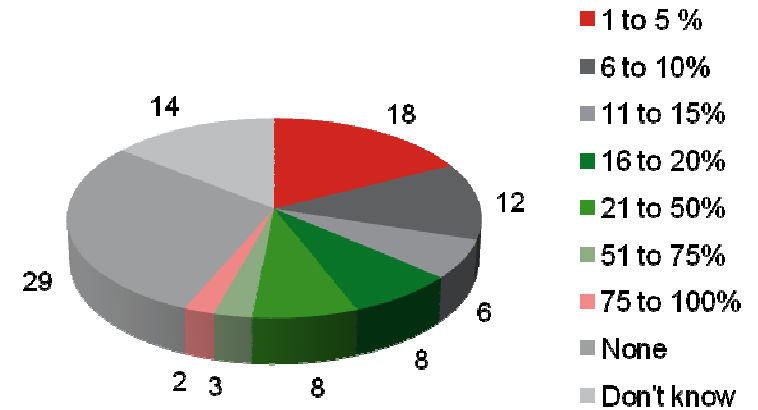
## Personal Income



## Basic salary



## Bonus, commision etc

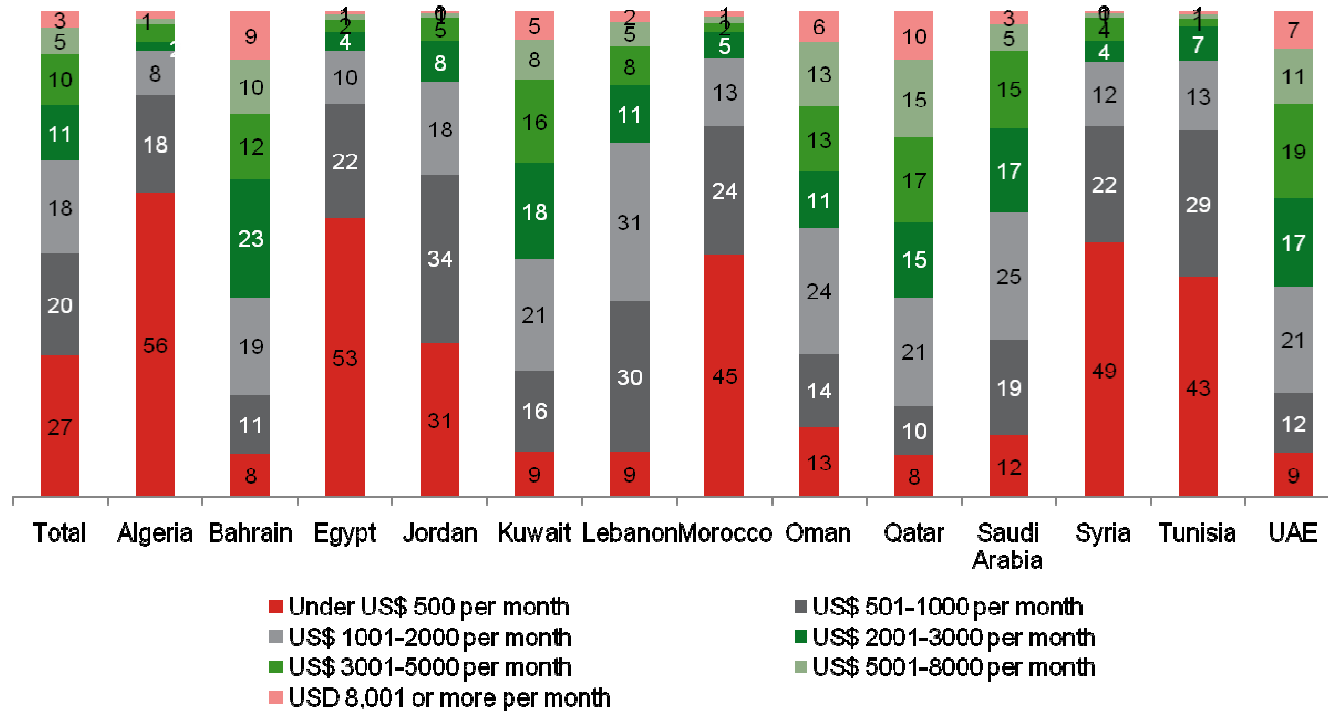


Base: Total (8,565)

# Personal income by country

- Within the GCC, Qatar reports a higher average personal income.
- Similarly in Levant it is Lebanon and North Africa it is Morocco

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

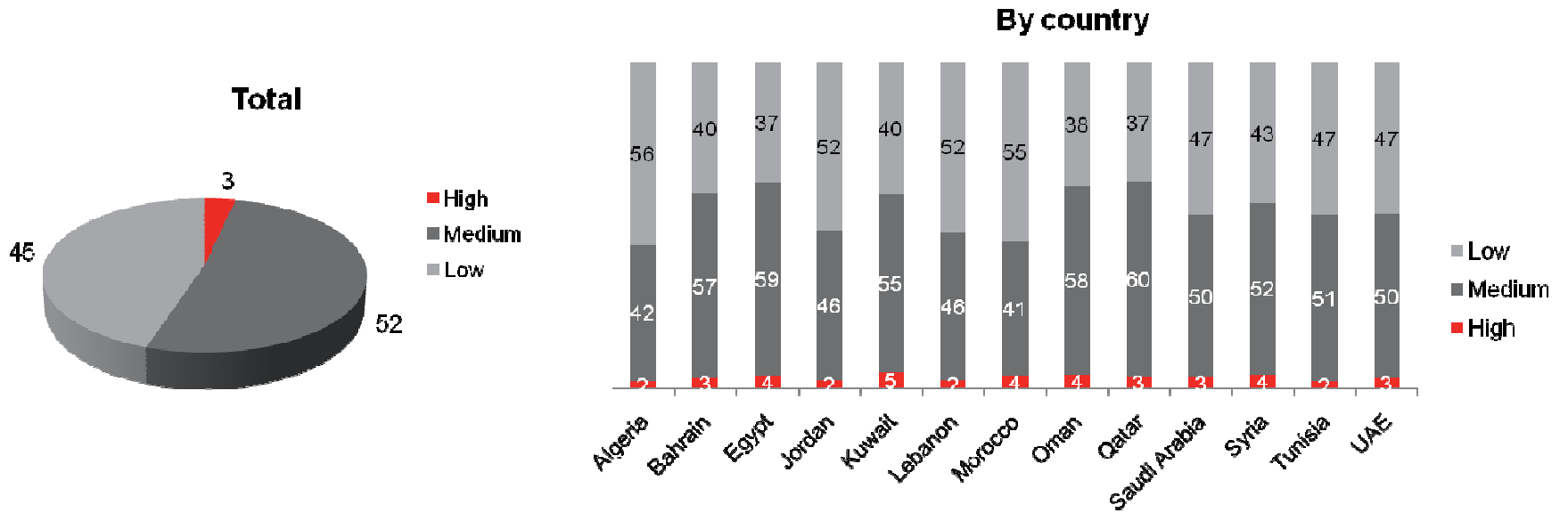


Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

# Satisfaction with Current Salary

- In the GCC, Qatar reports highest number of people who are satisfied with their current salary.
- Relatively higher proportion of dissatisfied employees in Algeria, Morocco and Lebanon.

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



Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

## Additional Benefits

- **Housing and air ticket allowances more prevalent in GCC countries – probably driven by the expatriate labor force.**
- **Housing allowance benefits quite insignificant in Levantine and North African countries**

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
<b>Basic salary</b>	89	79	91	89	90	88	89	85	90	91	94	87	83	92
<b>Personal medical insurance</b>	52	60	39	50	53	38	42	53	48	45	61	43	44	54
<b>Transport allowance</b>	37	31	40	29	27	20	53	22	40	49	48	23	20	43
<b>Housing allowance</b>	33	7	43	8	6	22	6	8	47	51	57	9	8	54
<b>Bonus</b>	31	29	37	42	35	26	36	15	45	36	24	28	18	26
<b>Family medical insurance</b>	27	32	24	16	25	20	12	26	32	23	39	15	24	25
<b>Personal annual air ticket</b>	24	6	37	4	2	28	4	2	46	49	40	9	4	50

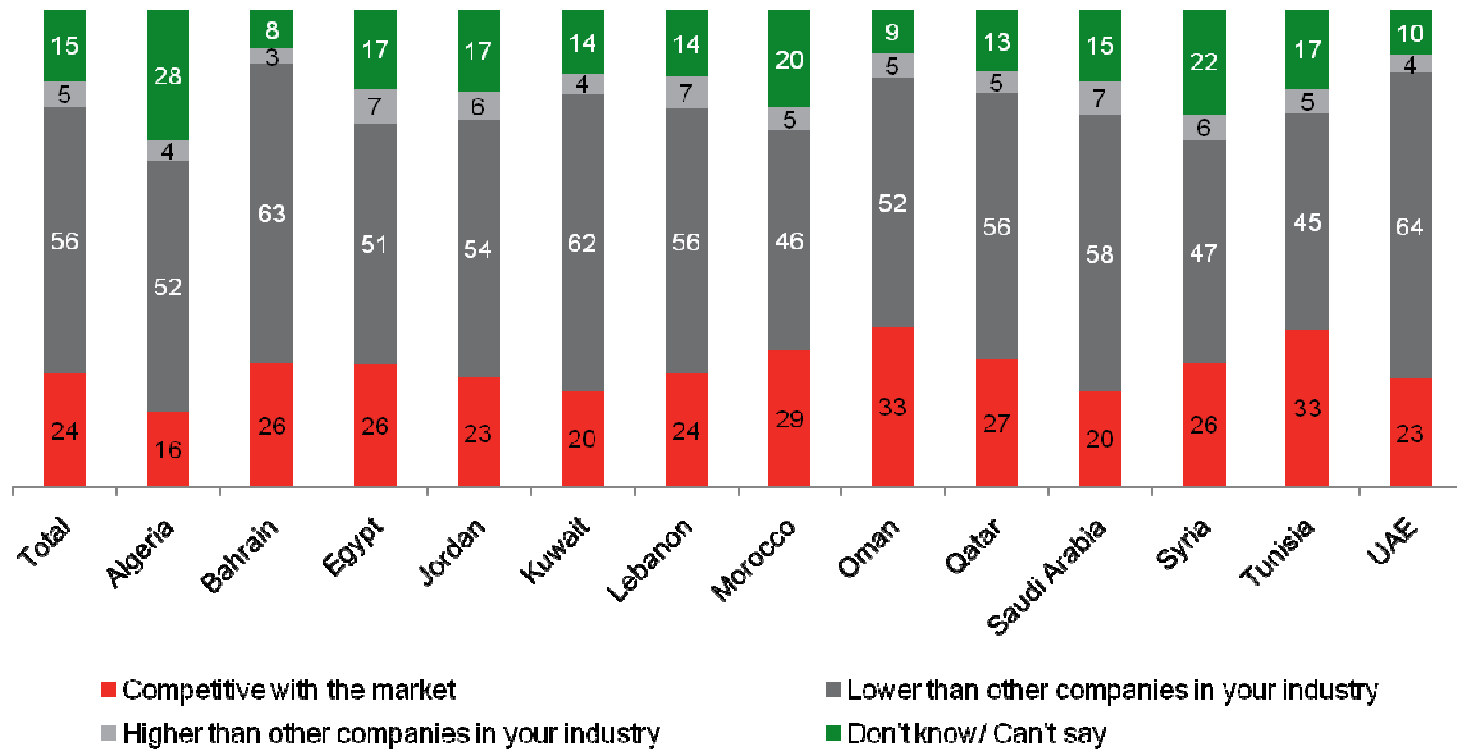
Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

# Salary Comparisons and Expectations

# Level of Competitiveness of Packages

- More than half of the respondents are of the opinion that their current pay is lower than other companies in their industry.
- In Tunisia and Oman one-third the sample opines that their pay is competitive with the market.

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

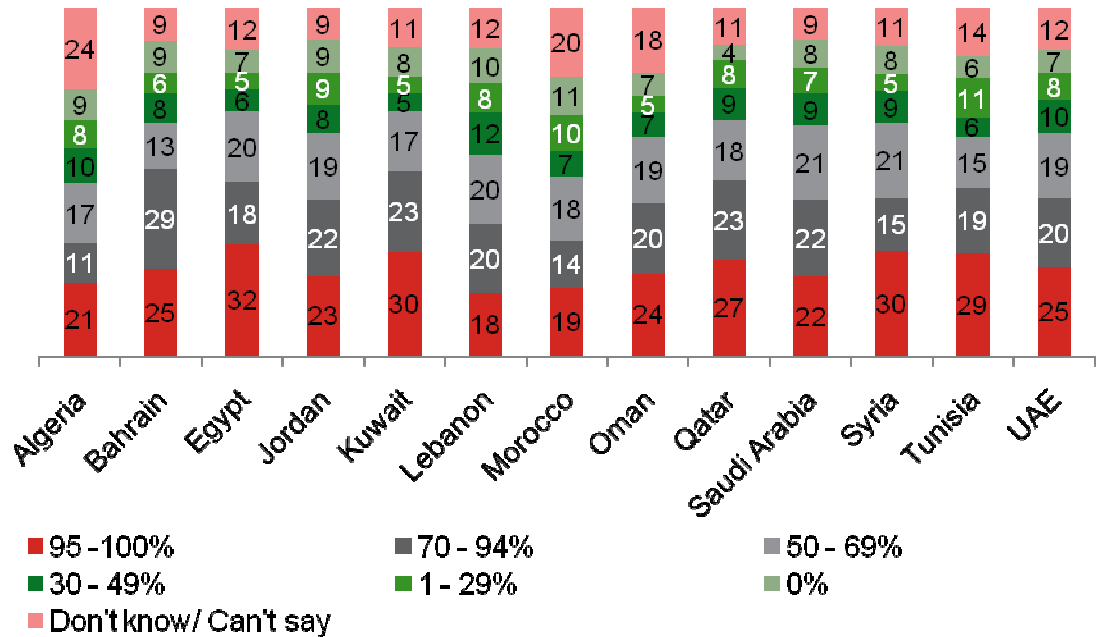
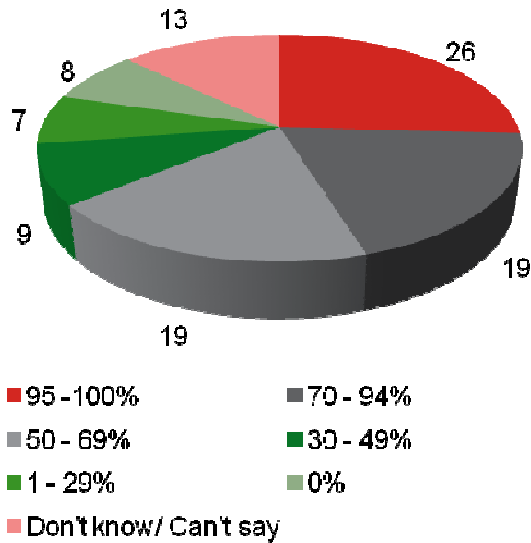


Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

# Loyalty towards the company

- About one fourth attribute their loyalty to the company to the salary they receive.
- Loyalty in Egypt, Kuwait and Syria is more salary driven than other countries.

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



Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

# Drivers for Loyalty

Q: What other variables most strongly drive your loyalty to the company beside pay?

	Total (8565)	Algeria (516)	Bahrain (97)	Egypt (1229)	Jordan (570)	Kuwait (332)	Lebanon (289)	Morocco (420)	Oman (119)	Qatar (289)	Saudi Arabia (1677)	Syria (247)	Tunisia (143)	UAE (1646)
Opportunities for long term career progression	36	29	39	38	46	33	47	29	34	32	35	35	42	39
My line manager	36	26	31	39	48	38	25	30	32	31	45	43	35	32
My colleagues and the environment I work in	32	28	37	39	39	32	31	27	22	30	32	36	29	33
Senior management	32	16	34	37	38	35	25	16	32	31	39	36	14	30
Training and development opportunities	28	31	20	35	35	23	24	24	18	22	33	36	31	23
The nature of my daily responsibilities	28	24	30	31	29	26	28	26	31	26	29	26	29	28
The company brand and reputation	26	20	24	32	29	24	32	17	24	28	23	29	24	30
Physical location of my workplace	17	15	14	21	20	14	18	13	13	10	19	16	18	15
Opportunities to travel	14	14	7	22	17	13	16	9	13	9	14	23	20	10
None - I am primarily interested in pay	8	11	4	7	7	7	6	15	2	8	8	9	8	7



# Increase in Salary in the past 12 months

- Interestingly, it is the Oil based economies where higher number of respondents reported not receiving a raise,

Q: Can you please select the total percentage raise you received in the past 12 months (December 2009 – December 2010)?

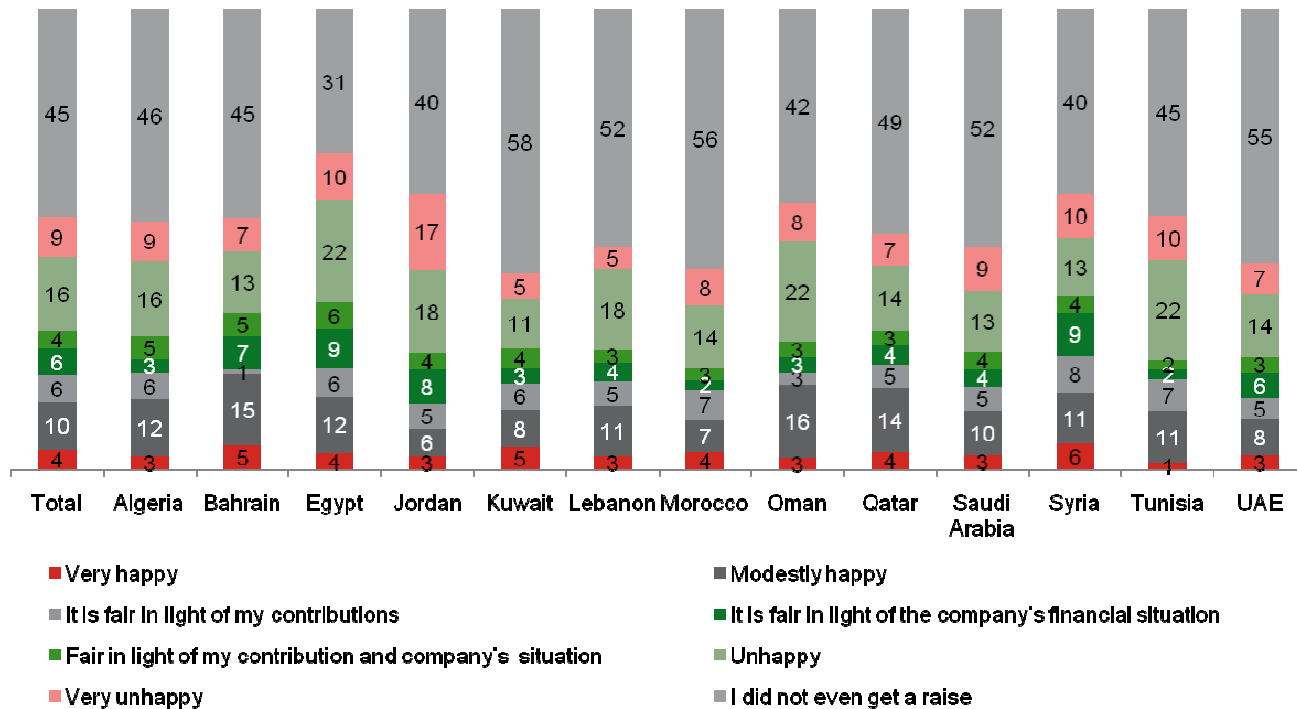
	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
1 to 5 %	19	20	25	16	26	10	18	24	25	20	21	18	22	18
6 to 10%	16	10	11	26	17	14	13	11	16	14	14	18	17	11
11 to 15%	8	7	7	11	7	9	7	5	3	8	7	11	10	6
16 to 20%	7	9	5	9	7	8	8	3	8	5	5	8	5	6
21 to 50%	5	6	3	5	4	6	6	4	5	4	4	5	2	5
51% and above	2	1	2	2	2	1	1	0	1	3	1	2	1	1
I did not get a raise	38	38	38	26	34	48	44	46	35	43	45	33	38	49
Don't Know	5	9	8	6	3	5	2	7	7	3	4	5	4	3

Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

# Satisfaction with raise

- Most respondents did not get a raise – higher proportions in the GCC countries except Oman
- Of those who did, the trend was towards dissatisfaction

Q: Please indicate how satisfied you are with the salary raise you have received this year



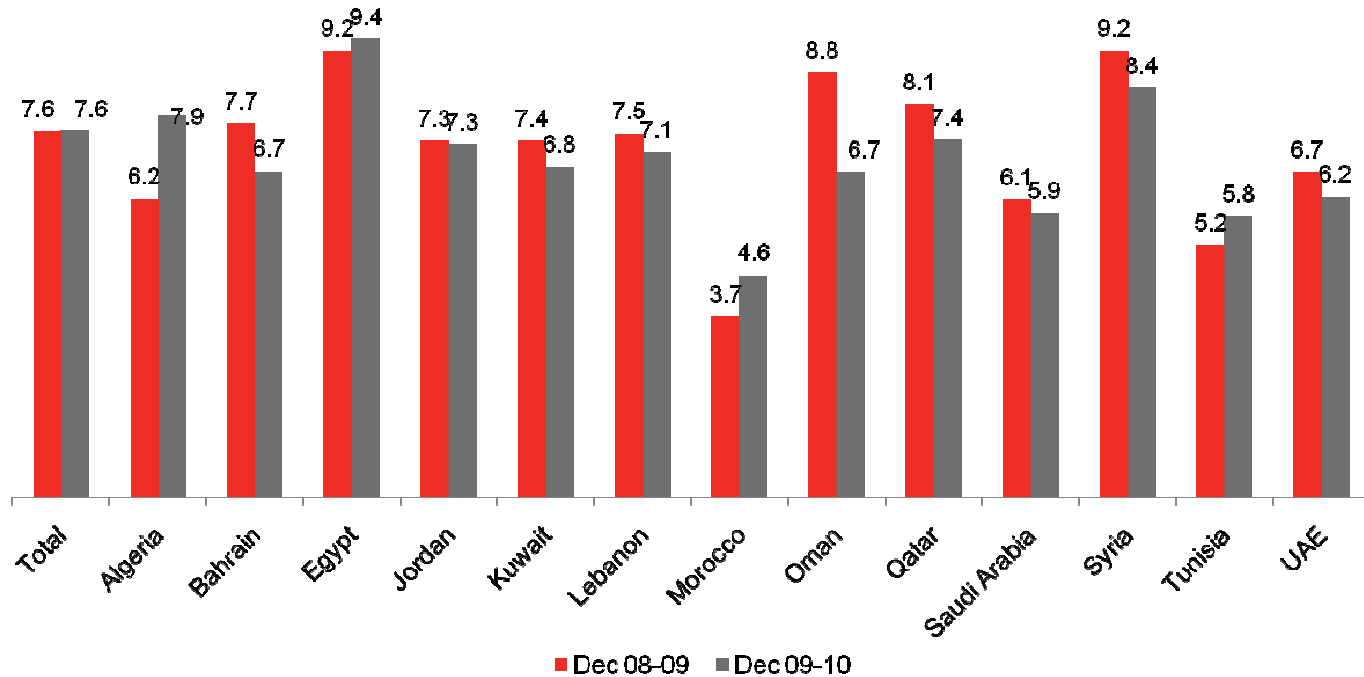
Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

# Salary raise in past 12 months vs. previous year

- The average raise given over the past two years is consistent, exception being Oman.

Q: Can you please select the total percentage raise you received in calendar year 2009 (December 2008 – December 2009)?

Q: Can you please select the total percentage raise you received in the past 12 months (December 2009 – December 2010)?



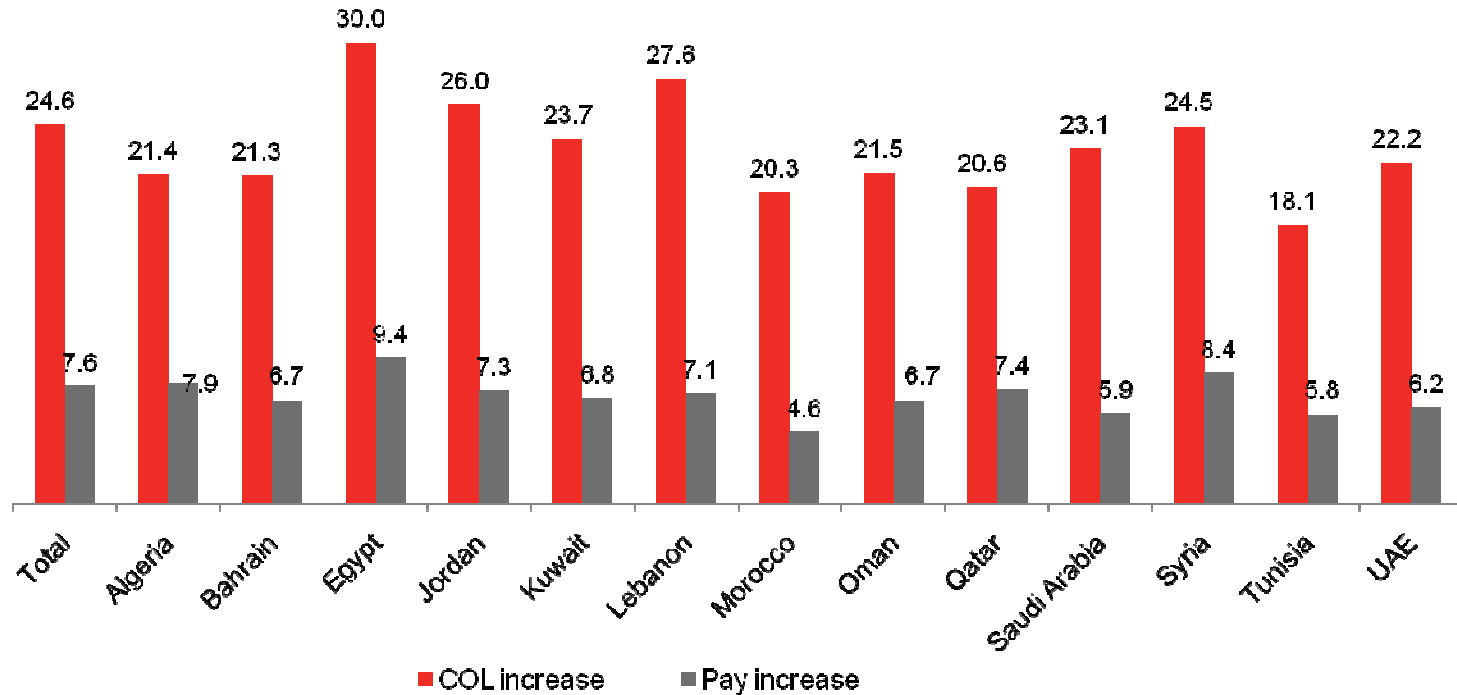
Mean Scores

Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

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

- All countries feel that cost of living has risen 3-4 times more than salary increments

Q: Can you please select the total percentage raise you received in the past 12 months (December 2009 – December 2010)?  
 Q: On average by what percentage do you think your cost of living has increased in the last 12 months?



Mean Scores

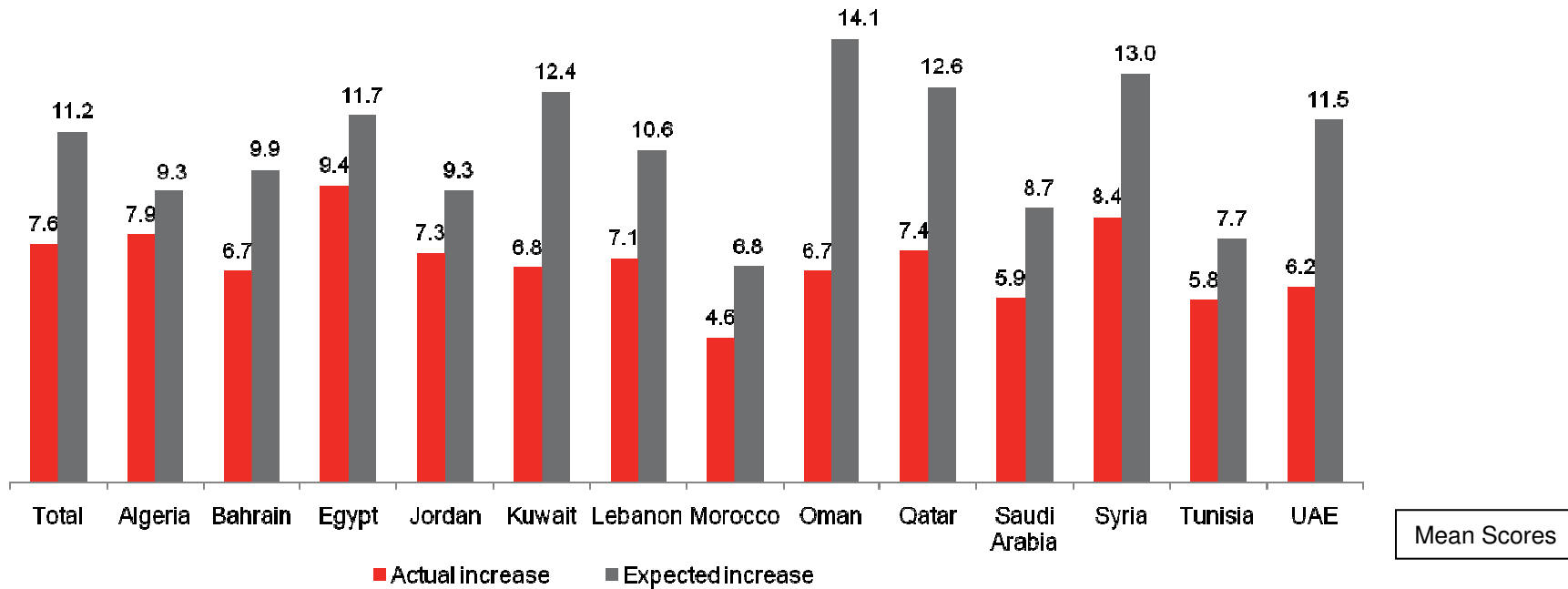
Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

# Salary raise received in the past 12 months vs. expected in the next 12 months

- All countries have an optimistic view of the future.

Q: Can you please select the total percentage raise you received in the past 12 months (December 2009 – December 2010)?

Q: Can you please select the total percentage raise you expect to receive in the next 12 months (December 2010 – December 2011)?



Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

# Percentage of raise DESERVED

Q: Being as realistic as possible, can you please select the total percentage raise you think you currently deserve?

	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
<b>1 to 5%</b>	3	2	5	2	2	2	2	4	0	3	4	1	4	2
<b>6 to 10%</b>	9	6	16	6	8	6	8	10	9	10	12	8	8	9
<b>11 to 15%</b>	12	9	13	12	15	12	9	15	16	14	14	13	16	11
<b>16 to 20%</b>	17	7	18	17	18	17	24	16	15	16	20	16	20	16
<b>21 to 30%</b>	18	11	20	19	23	23	21	11	18	22	17	15	19	19
<b>31 to 50%</b>	17	21	11	18	16	14	18	17	21	13	15	18	16	18
<b>51% and above</b>	15	26	8	16	12	13	12	11	13	12	11	16	8	16
<b>I am at the right level</b>	4	7	2	4	2	6	3	5	3	4	3	6	3	3
<b>Don't know</b>	6	11	6	7	4	7	3	10	6	5	5	6	6	6

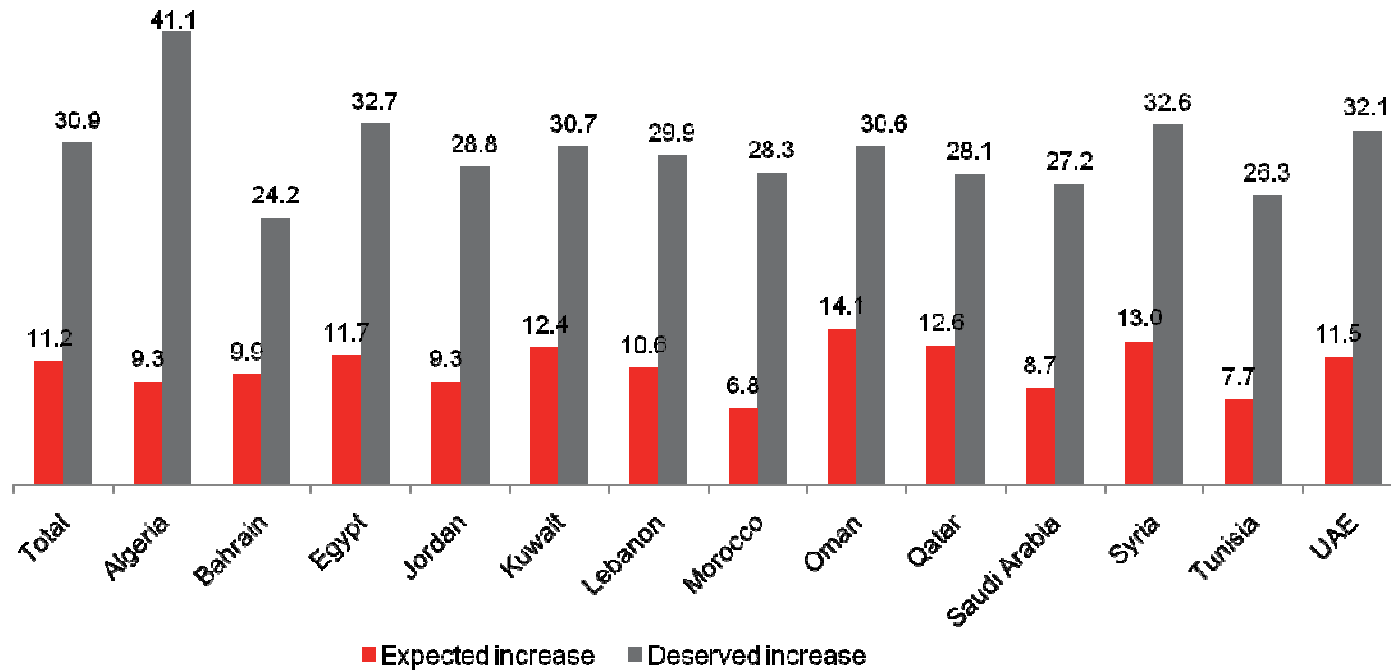
Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

# Percentage of raise DESERVED vs. EXPECTED

- All countries feel that they deserve a pay increase of 2 to 3 times what they are likely to get next year

Q: Can you please select the total percentage raise you expect to receive in the next 12 months (December 2010 – December 2011)?

Q: Being as realistic as possible, can you please select the total percentage raise you think you currently deserve?



Mean Scores

Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

# Proportion of Salary Saved

- Most respondents cannot save anything – highest proportions in Jordan, Morocco and Egypt.
- Kuwait and Qatar has respondents who save a relatively good sum of their salary.

Q: What proportion of your household income is actually saved?

	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
1 to 5 %	16	17	13	15	14	12	16	14	16	17	15	16	24	16
6 to 10%	10	10	9	8	8	10	8	7	11	8	11	9	12	12
11 to 15%	7	6	12	6	5	6	7	6	6	9	6	5	6	8
16 to 20%	8	8	8	7	4	11	8	6	11	13	7	9	10	11
21 to 50%	8	8	16	6	4	14	6	3	13	16	10	6	2	11
51 to 75%	3	1	6	2	1	4	2	1	6	7	4	4	0	2
75 to 100%	1	1	2	1	0	1	1	0	3	1	1	0	1	0
None	42	43	28	49	60	36	46	52	30	23	42	45	40	34
Don't know	6	6	4	7	4	5	6	11	5	7	5	5	5	5

Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)



# Expenses & Savings

## Increase in Cost of Living in past 12 months

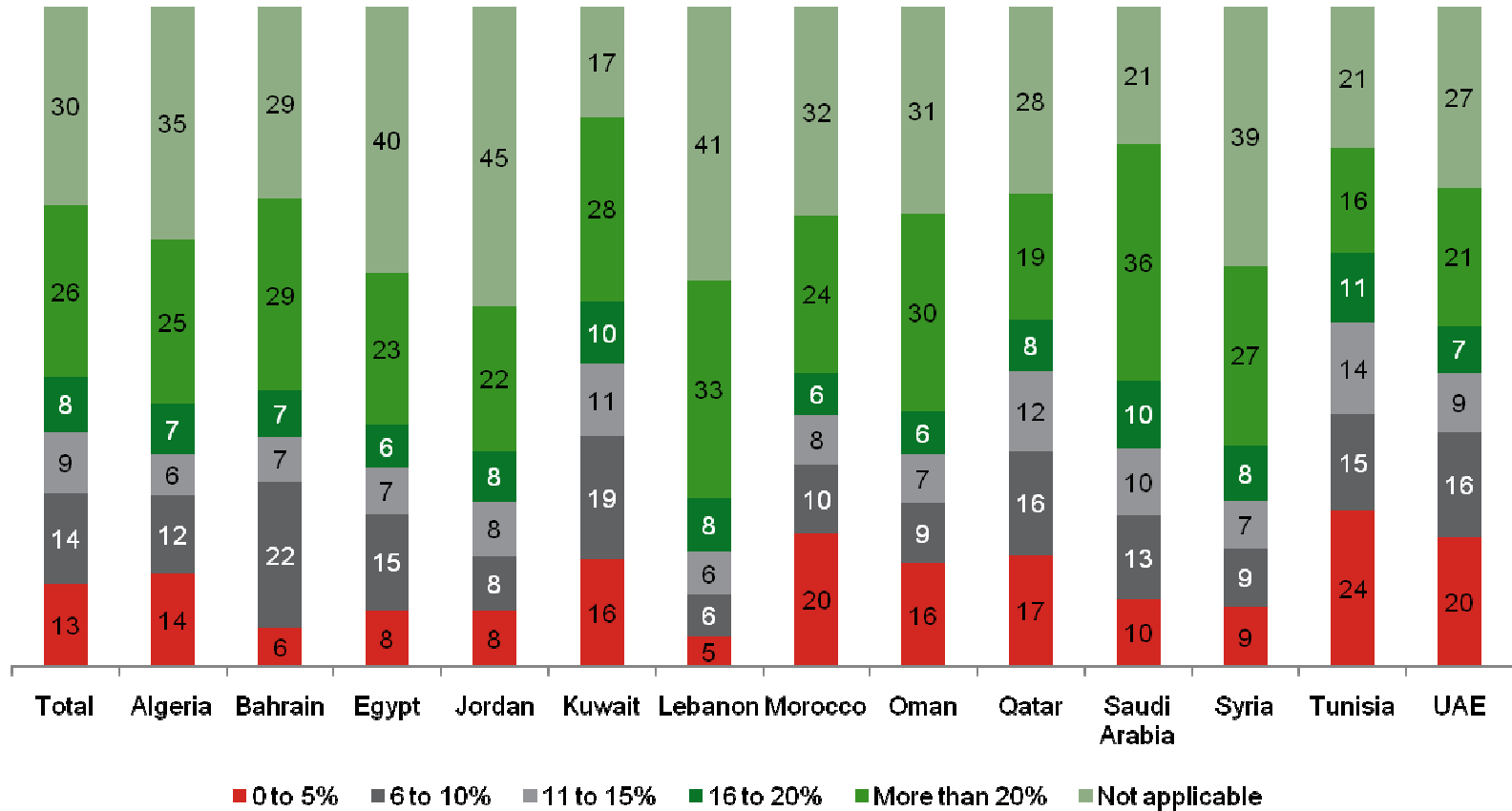
Q: On average by what percentage do you think your cost of living has increased in the last 12 months (December 2009 - December 2010)?

	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
<b>1 to 5%</b>	5	6	9	3	5	3	3	9	14	8	6	6	8	5
<b>6 to 10%</b>	12	11	19	8	8	12	7	15	16	15	14	11	19	14
<b>11 to 15%</b>	13	10	13	9	13	16	14	13	13	16	14	11	20	17
<b>16 to 20%</b>	15	14	12	14	20	17	14	10	15	18	15	17	15	15
<b>21 to 30 %</b>	17	12	15	20	22	17	24	10	10	16	17	18	12	17
<b>31 to 50%</b>	14	13	13	17	14	12	20	10	15	10	13	16	6	11
<b>51% and above</b>	9	7	6	14	9	8	9	8	8	6	8	8	6	7
<b>It decreased in the past 12 months</b>	2	3	2	2	1	1	1	3	0	2	2	1	0	3
<b>Don't know</b>	7	10	5	7	5	8	4	11	4	6	7	7	6	5
<b>It has not changed</b>	6	13	4	5	3	5	3	11	4	4	6	6	9	5

Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

# Increase in Rents

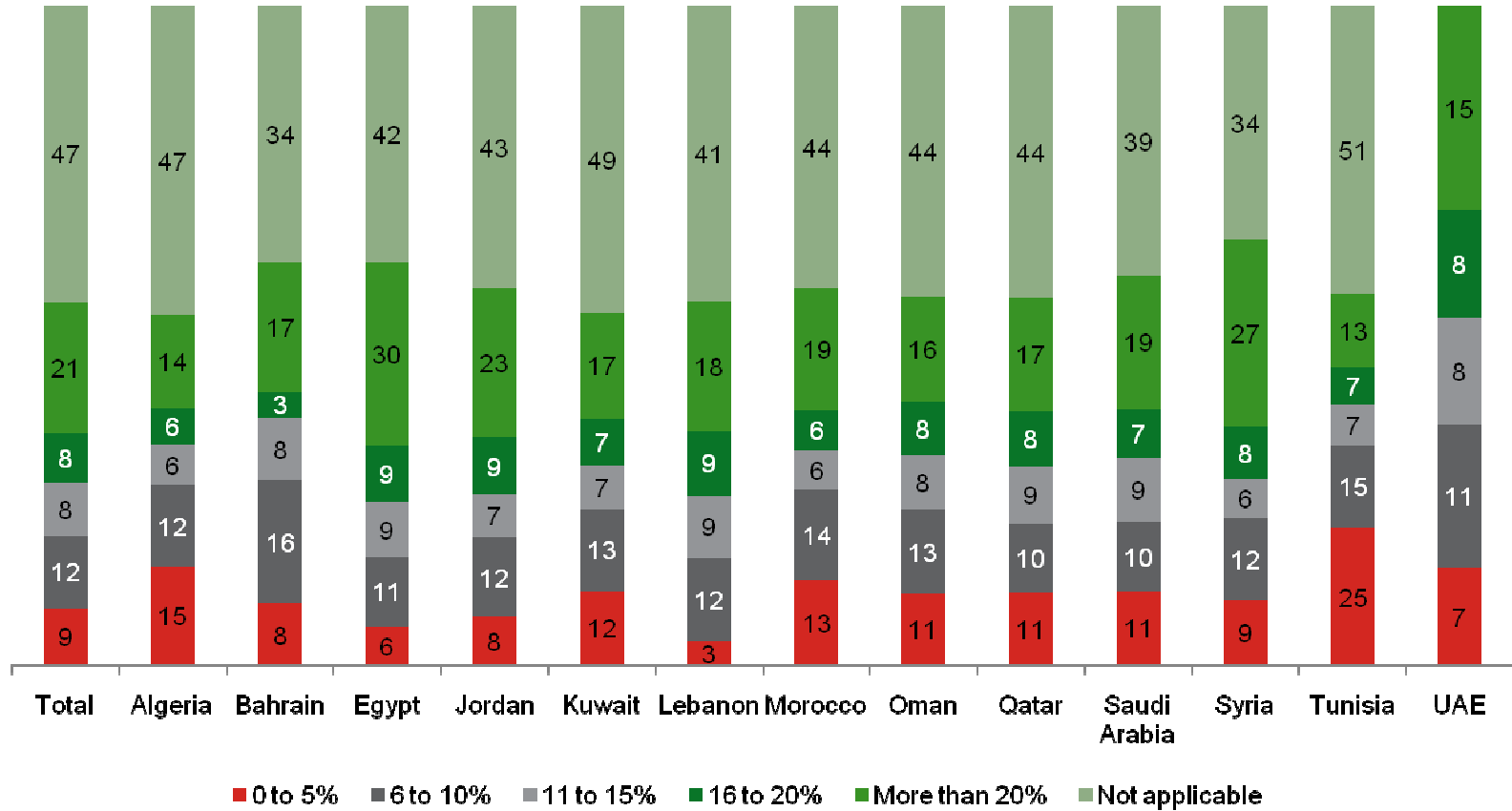
Q: Of this increase in the cost of living, if relevant, please quantify the approximate increase in the following components:



Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

# Increase in Schooling Expenses

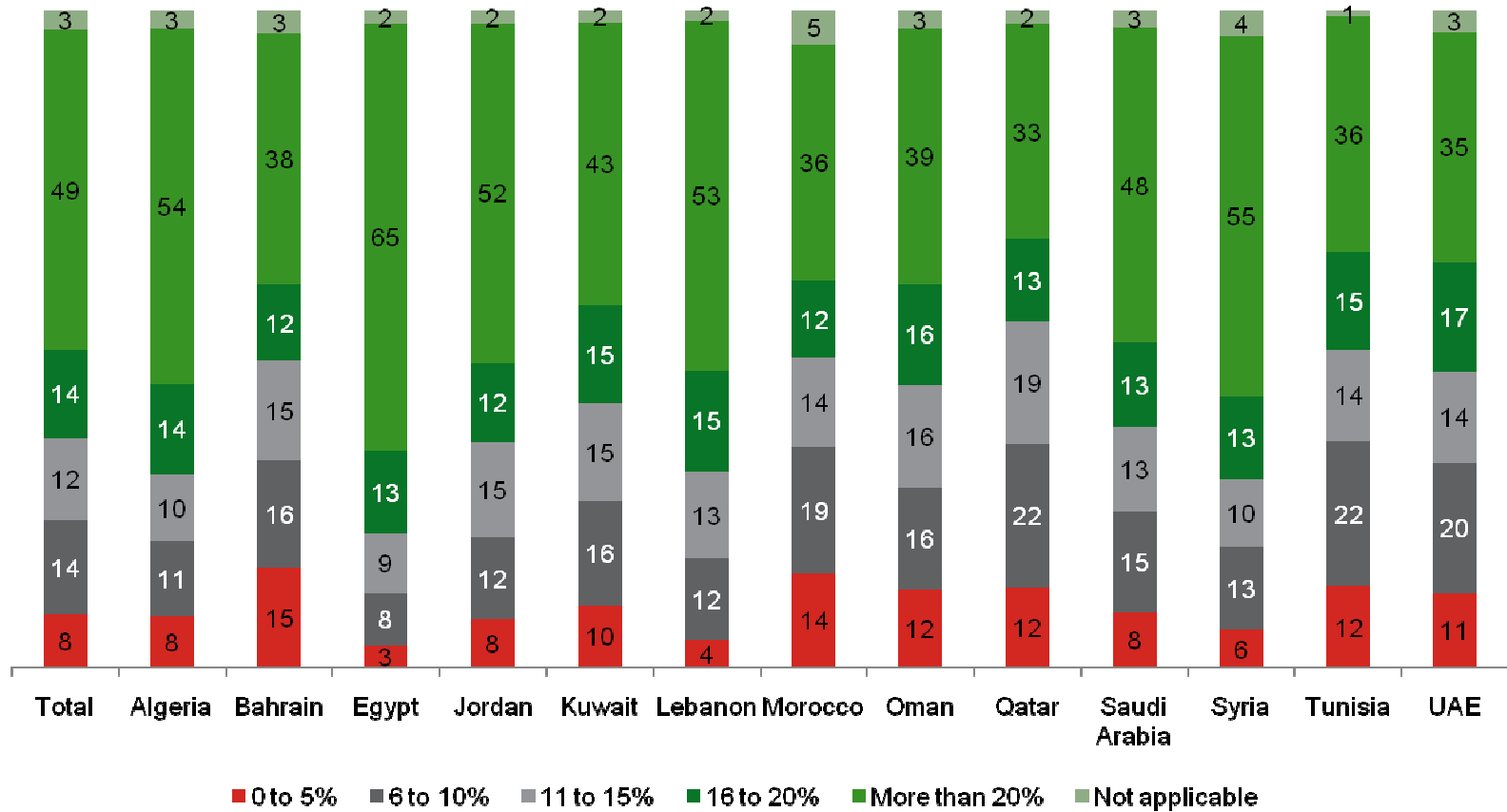
Q: Of this increase in the cost of living, if relevant, please quantify the approximate increase in the following components:



Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

# Increase in Food Expenses

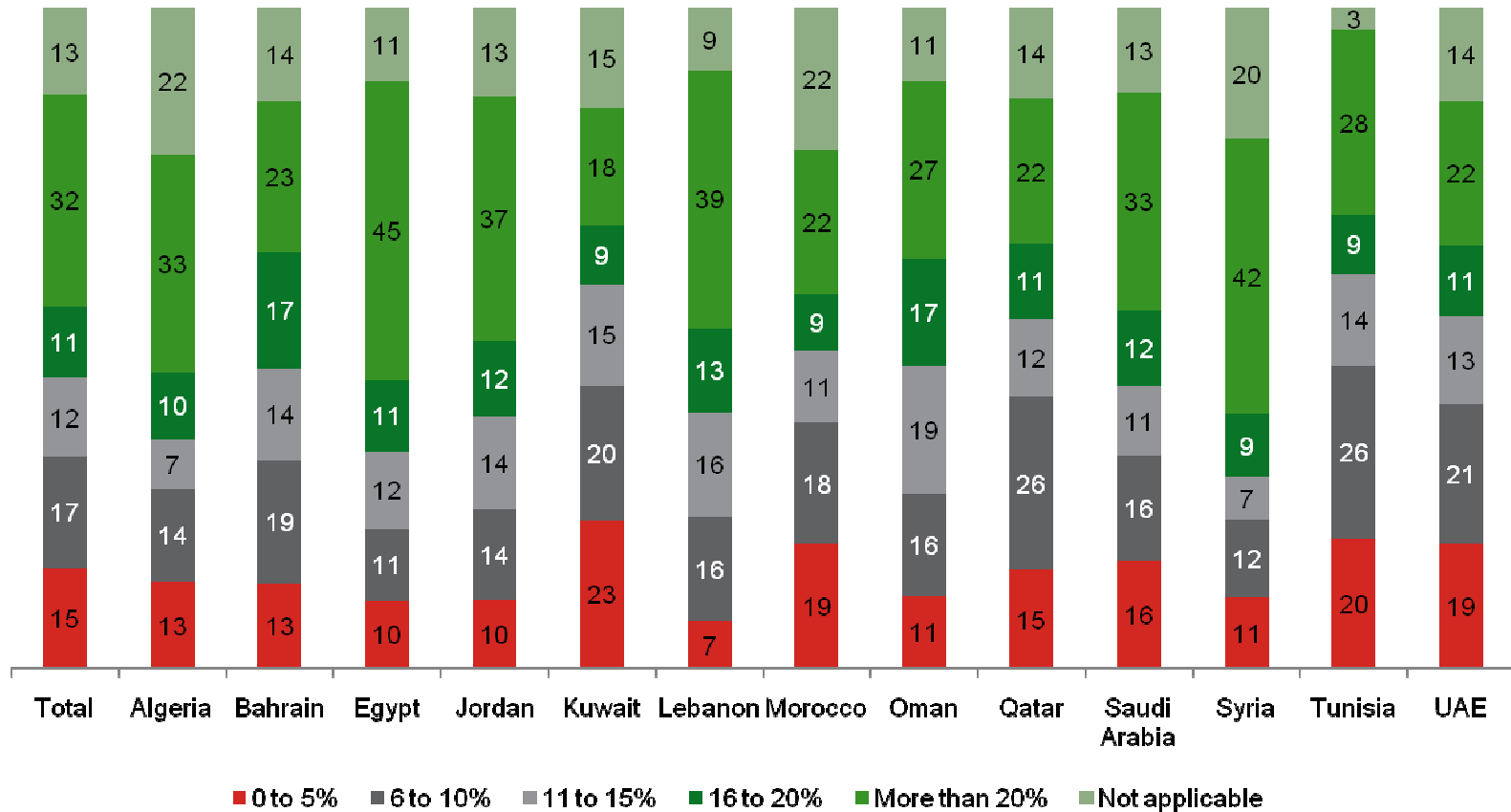
Q: Of this increase in the cost of living, if relevant, please quantify the approximate increase in the following components:



Base Those who said COL has increase: Total (7314), Algeria (375), Bahrain (86), Egypt (1048), Jordan (520), Kuwait (284), Lebanon (266), Morocco (316), Oman (109), Qatar (254), KSA (1444), Syria (212), Tunisia (122), UAE (1427)

# Increase in Entertainment Expenses

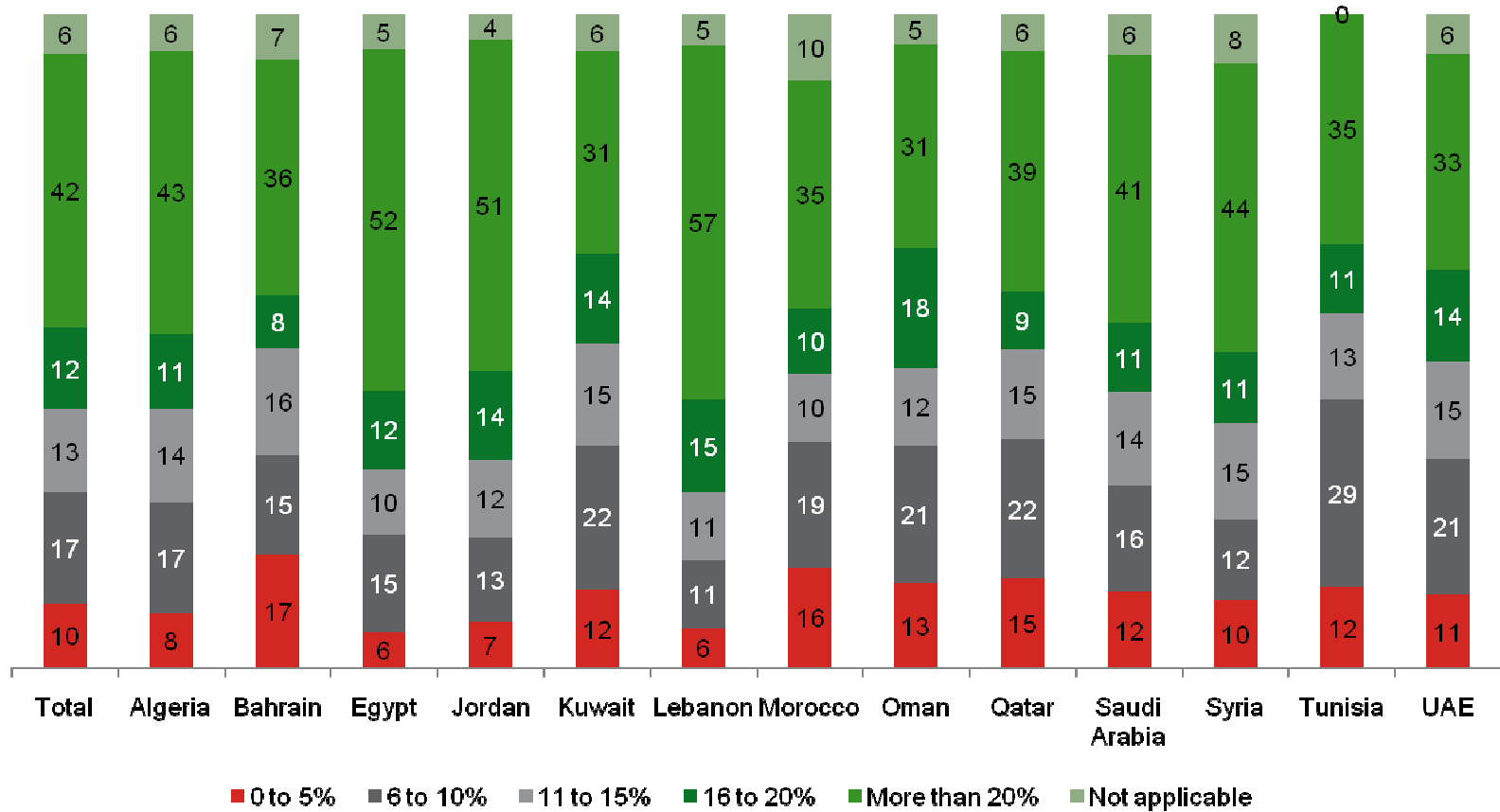
Q: Of this increase in the cost of living, if relevant, please quantify the approximate increase in the following components:



Base Those who said COL has increase: Total (7314), Algeria (375), Bahrain (86), Egypt (1048), Jordan (520), Kuwait (284), Lebanon (266), Morocco (316), Oman (109), Qatar (254), KSA (1444), Syria (212), Tunisia (122), UAE (1427)

# Increase in Other Expenses

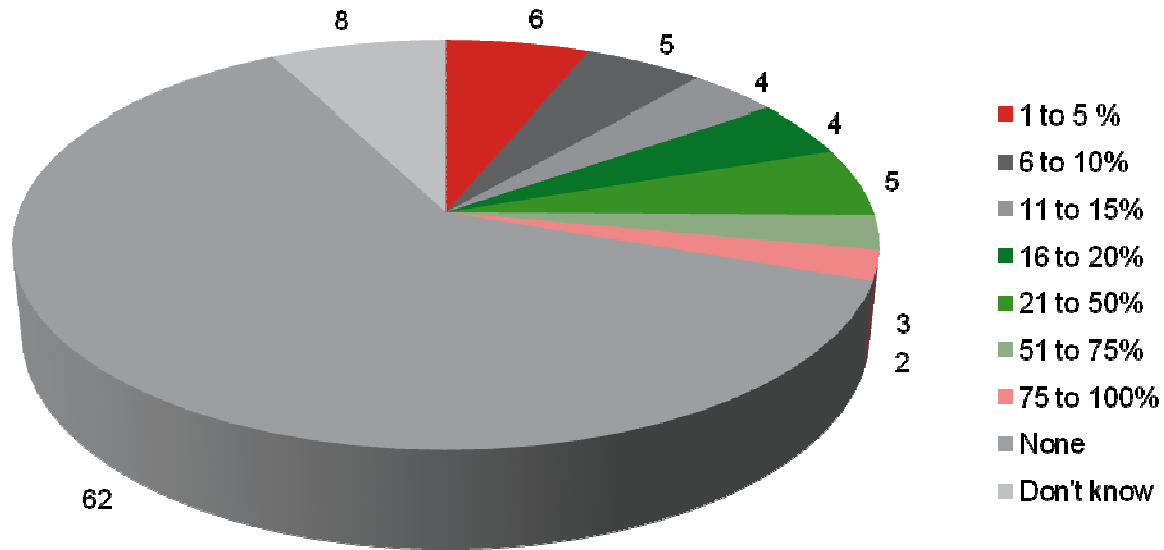
Q: Of this increase in the cost of living, if relevant, please quantify the approximate increase in the following components:



Base Those who said COL has increase: Total (7314), Algeria (375), Bahrain (86), Egypt (1048), Jordan (520), Kuwait (284), Lebanon (266), Morocco (316), Oman (109), Qatar (254), KSA (1444), Syria (212), Tunisia (122), UAE (1427)

# Percentage of savings repatriated to home country

Q: What percentage of your savings if you save are repatriated to home country?

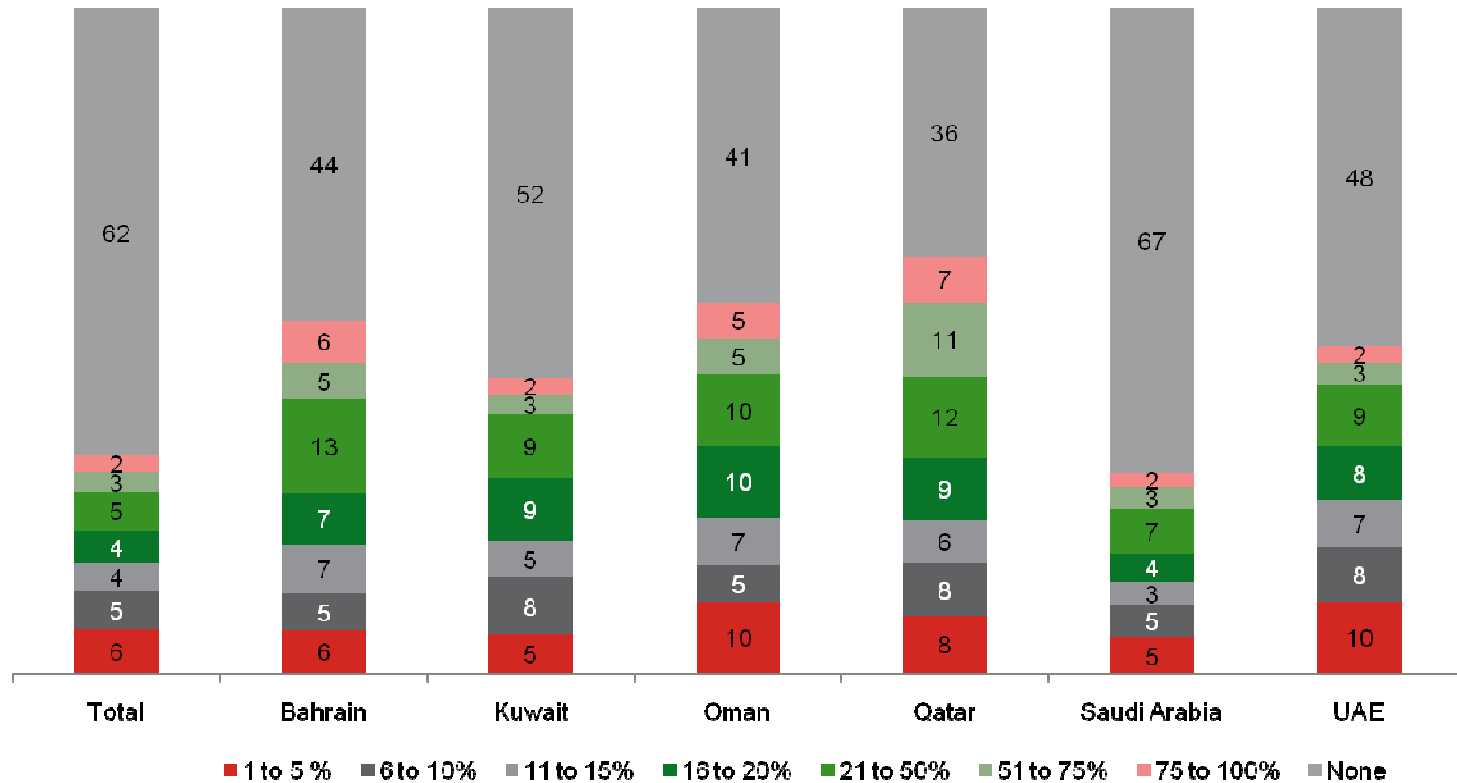


Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)



# Percentage of savings repatriated to Home Country – GCC Countries

Q: What percentage of your savings if you save are repatriated to home country?

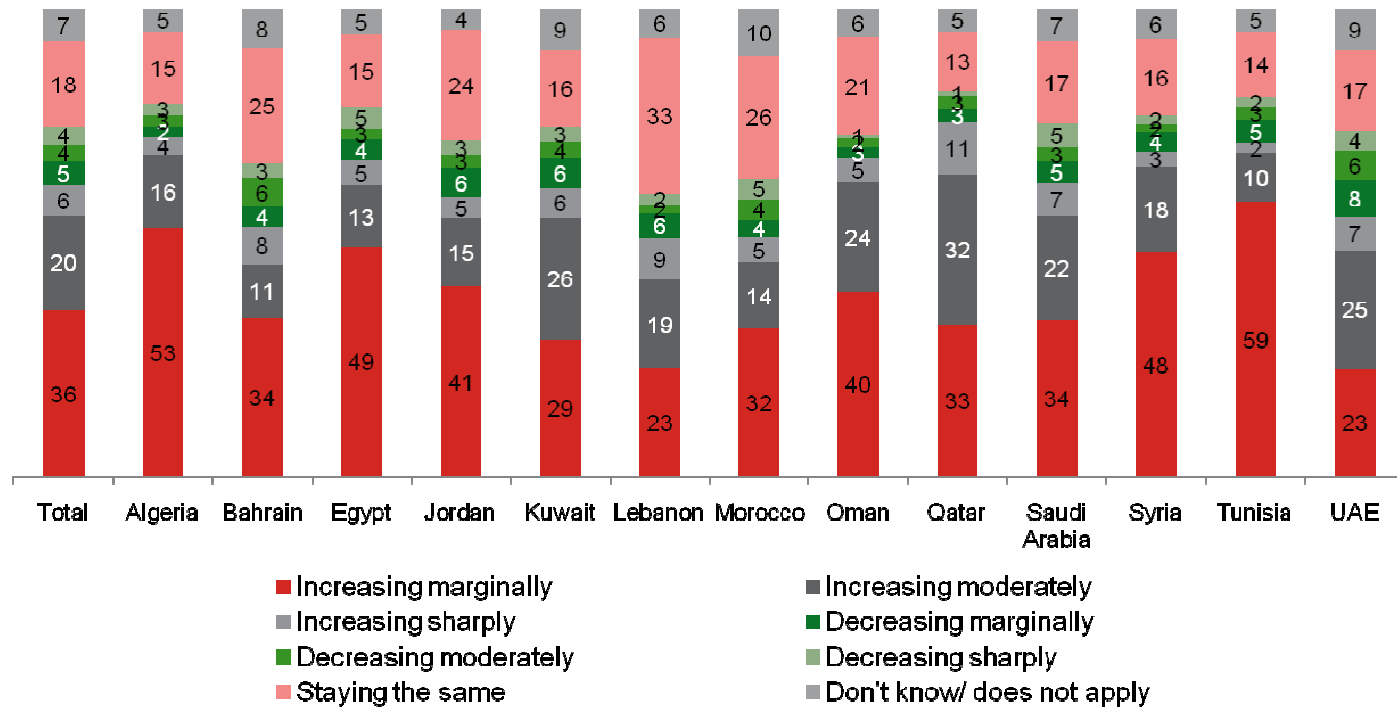


Base: Total (8,565), Bahrain (97), Kuwait (332), Oman (119), Qatar (289), KSA (1677), UAE (1646)

# Change in Salaries within country of Residence

- Respondents from North Africa claim highest increase in salaries.

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

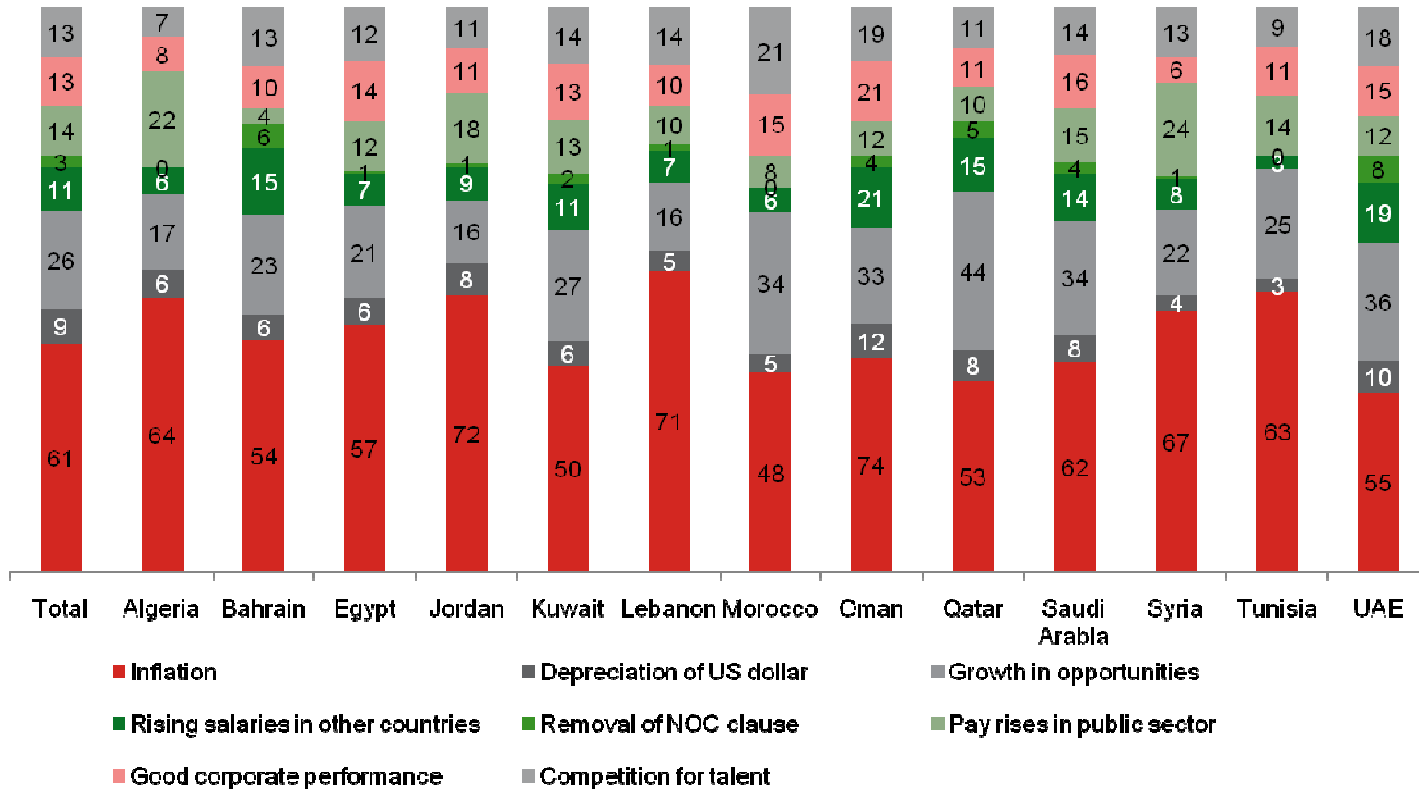


Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

# Factors causing salaries to increase

- Inflation is identified as the main factor for driving salaries upward.

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

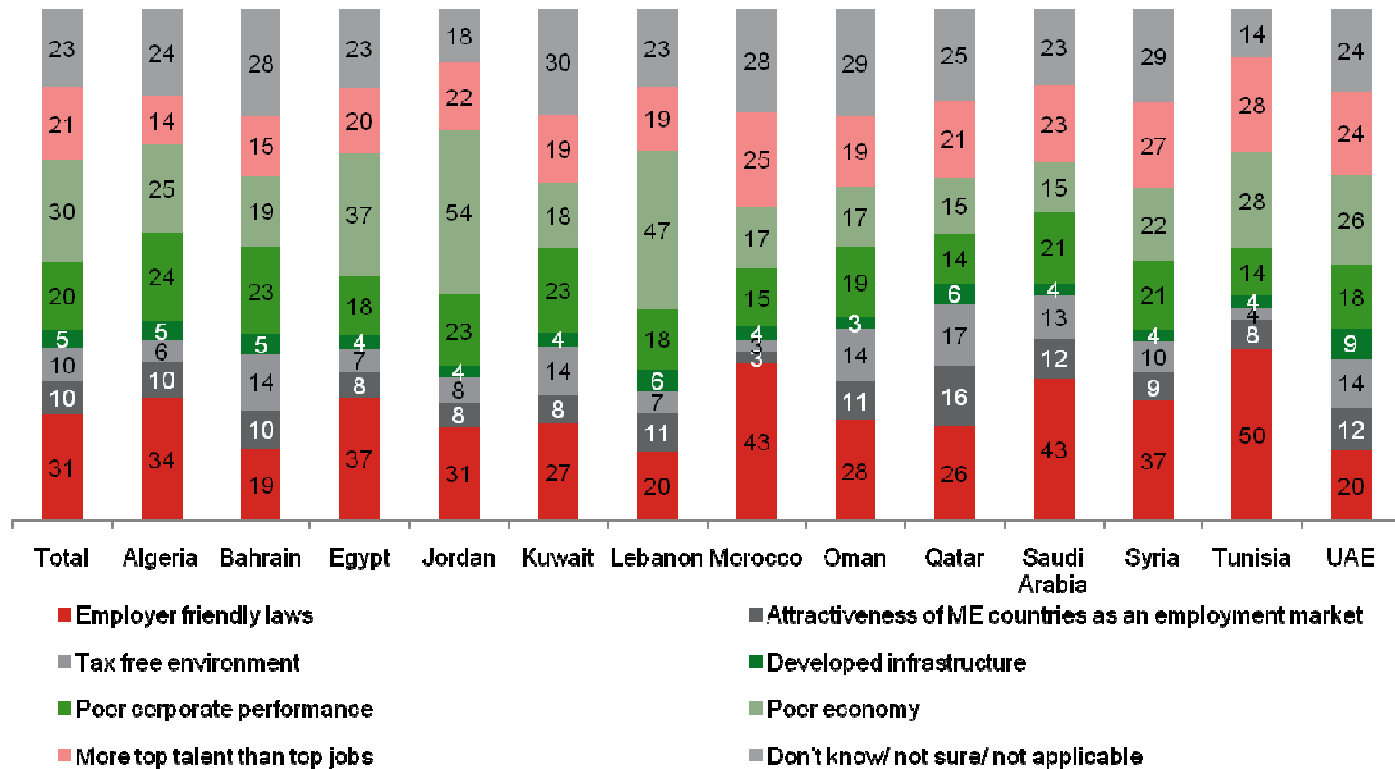


Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

# Reasons for salaries not increasing

- 'Employer friendly laws' the main reason impacting insufficient salary growth closely followed by 'poor economy' and 'poor corporate performance'

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

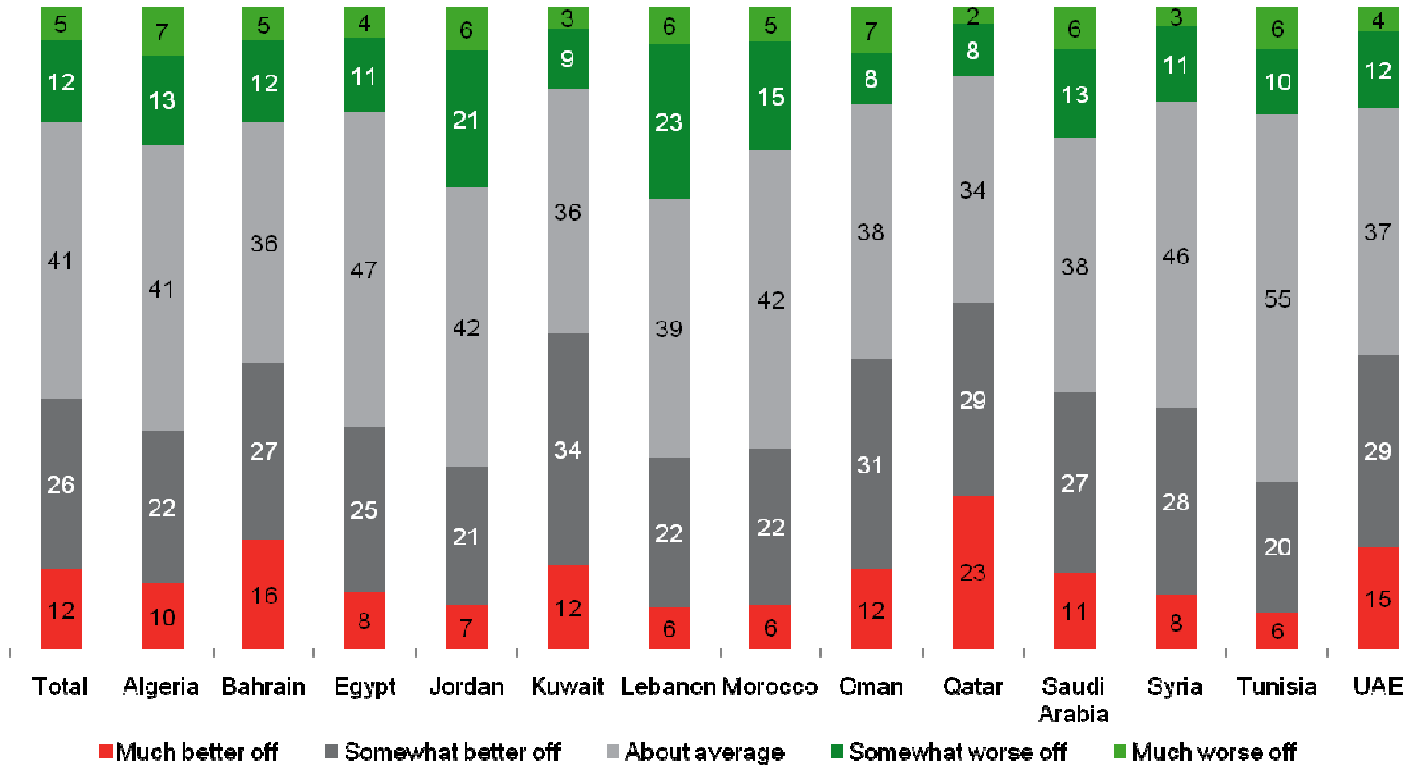


Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

# Are you better or worse off?

- Most employees feel they are either average or somewhat better off than others of their generation.
- Qatar, Kuwait, Bahrain and UAE have a higher optimism in this regard.

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

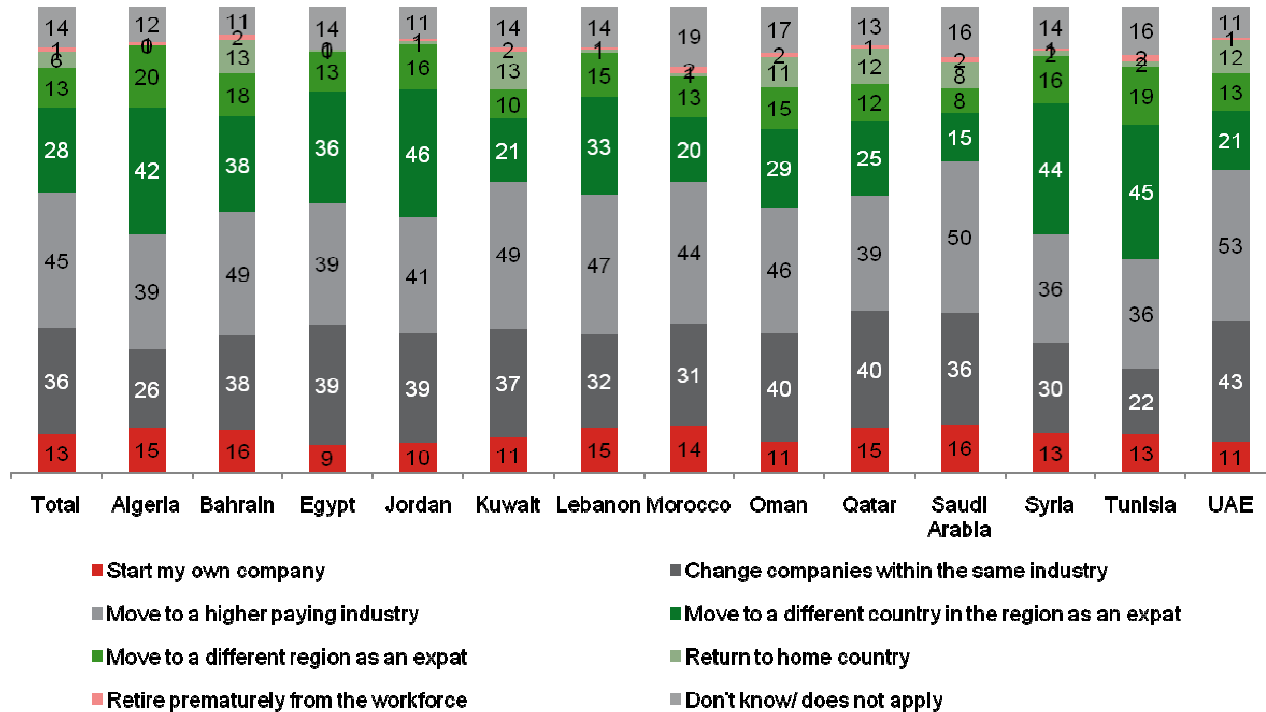


Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

# Actions to improve quality of life

- The spirit of entrepreneurship is lower however people are incline change jobs within the industry or move to higher paying industry to help improve quality of life.

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

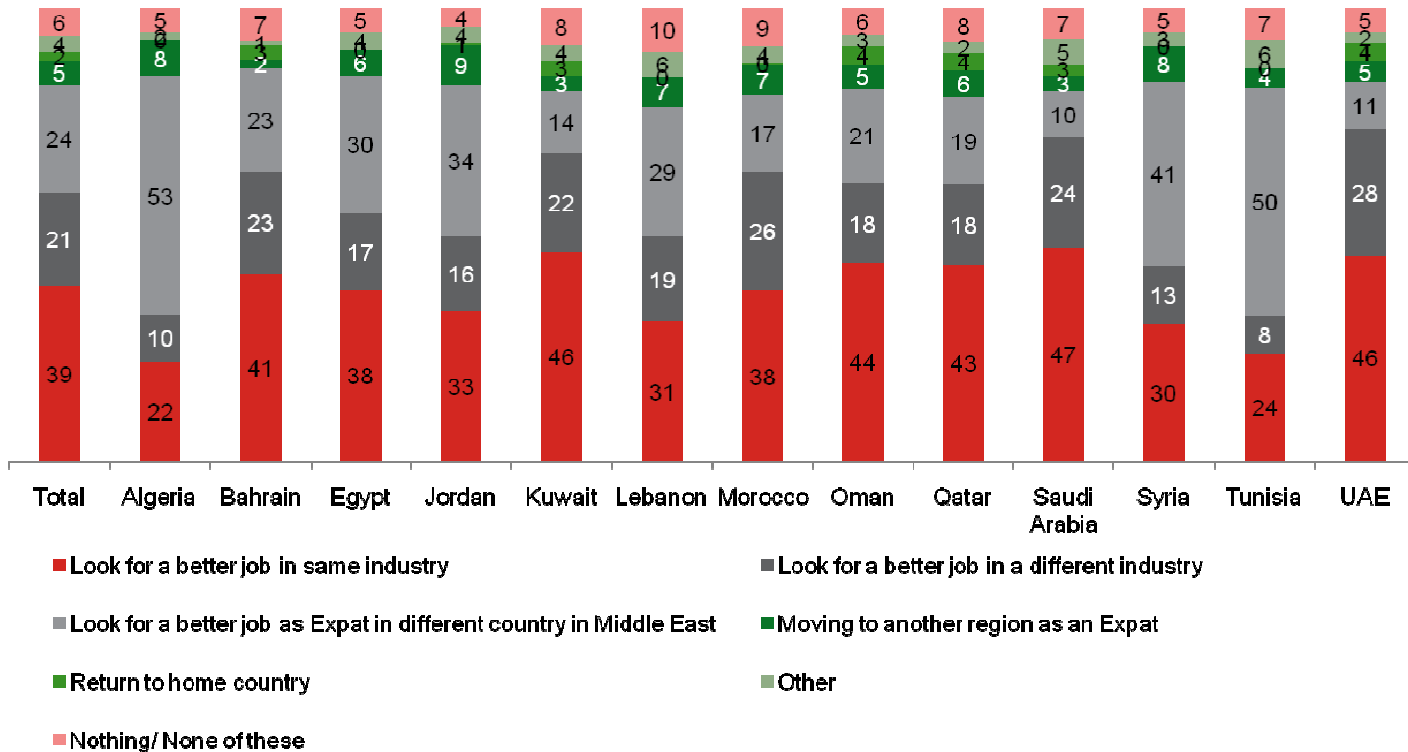


Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

# Actions to tackle rising expenses

- Switching jobs within the industry is the most common response across the region.

Q: Which of these would you consider doing due to the rise in your monthly household expenses?

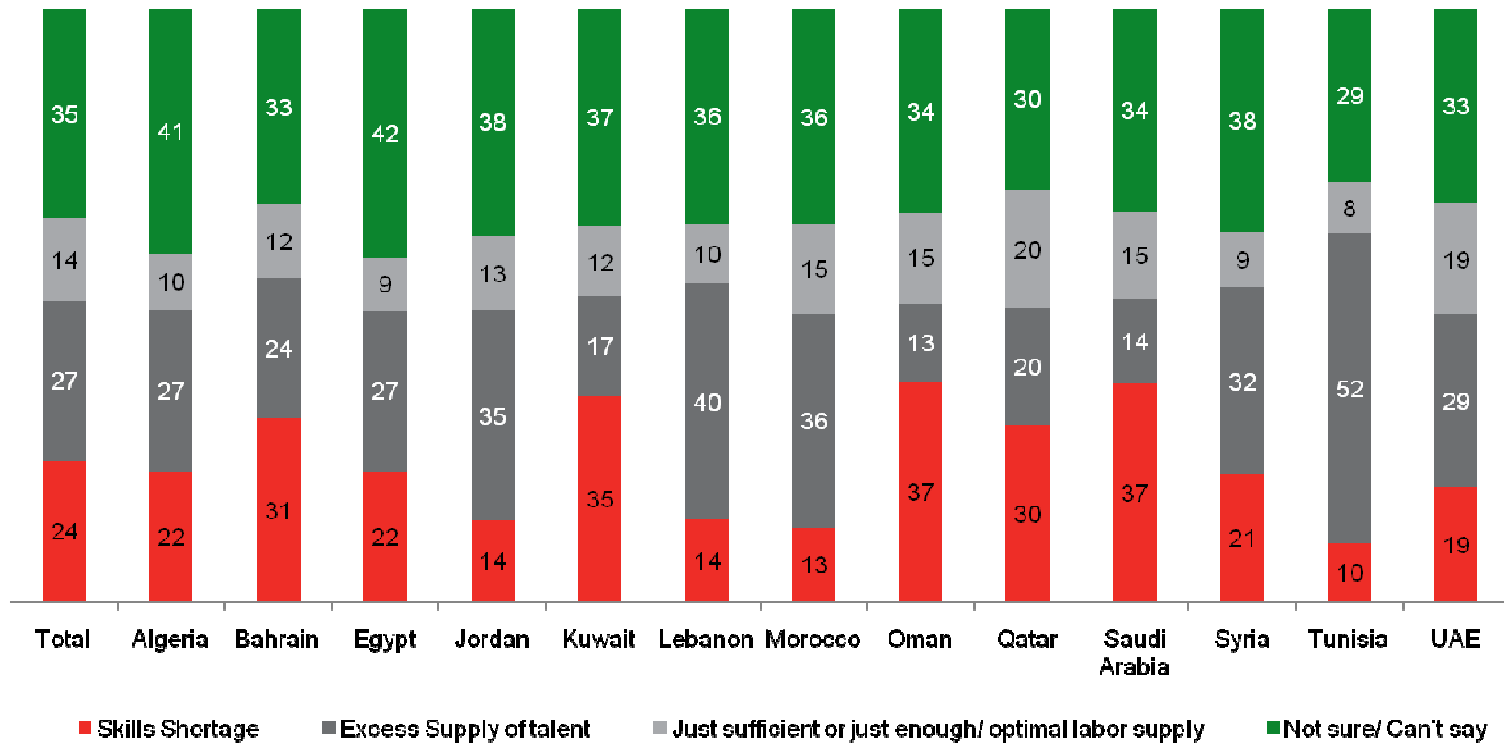


Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

# Skills/ labour supply status in country of residence

- Apart from UAE, other GGC countries report a 'Skills Shortage'.

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



Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

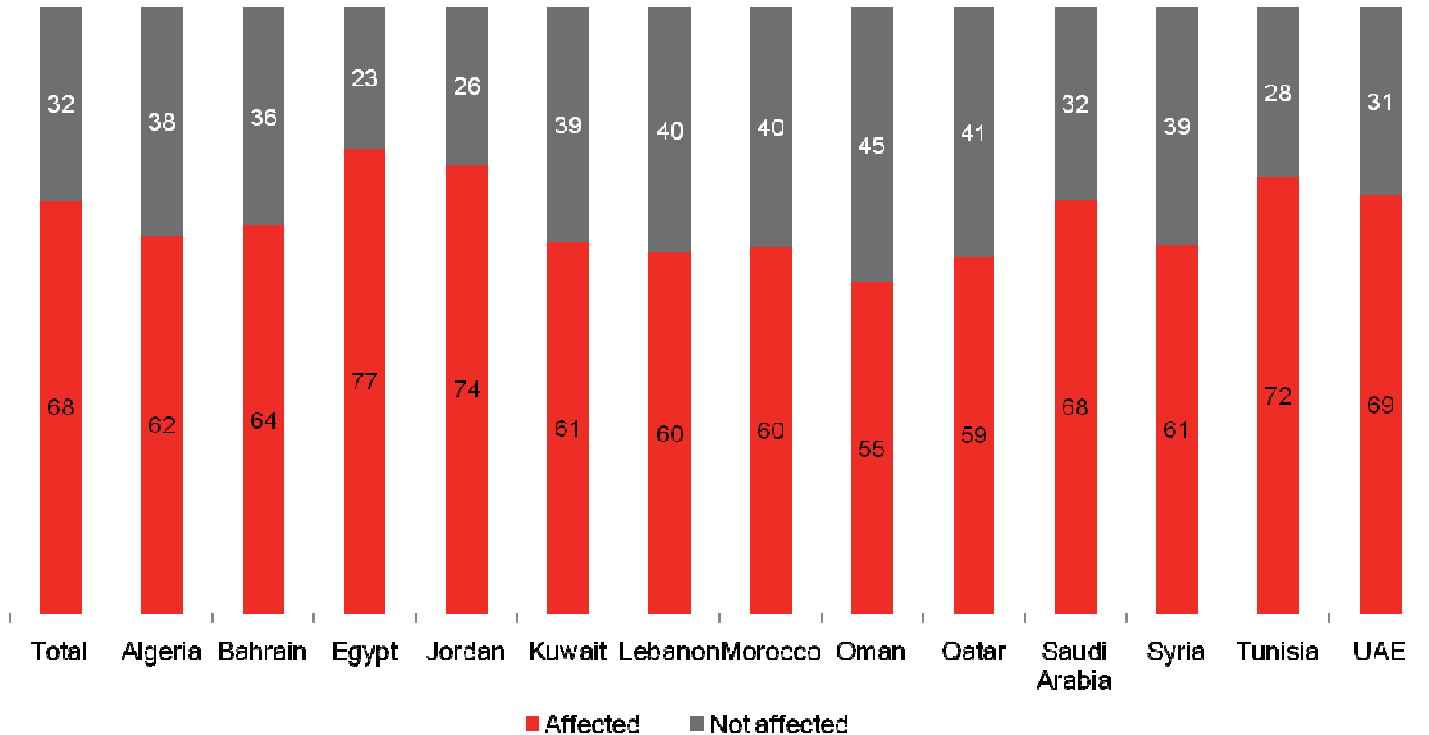


# Impact of Current Economic Situation

## Effect of company actions

- Majority of the respondents claim they are still affected by the tight economic situation through company actions.
- Most affected are the North African countries.

Q: Were you/ are you still affected by the tight economic situation through company actions?



Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

## Actions during tight economic situation 1/2

Q: During the tight economic situation, would you say your company took any of the following actions?  
(Please select all that apply)

	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
Cutting down on unnecessary expenses	26	17	32	26	25	30	27	17	31	29	21	27	17	34
Not giving promotions	25	19	28	24	25	29	24	22	27	27	24	23	15	33
Firing people	25	19	32	25	22	33	13	20	24	28	21	20	21	35
Hiring freezes	24	13	30	27	30	30	16	15	29	26	20	23	13	31
Restructuring job profiles	23	13	26	24	23	27	15	21	19	21	21	19	20	30
Cancellation of bonus	19	12	20	17	18	23	23	20	20	20	17	19	10	28
Reduction/cancellation in increments	19	9	28	18	19	22	9	13	20	20	18	18	8	30
Rehiring vacant positions at a lesser salary	19	21	14	17	22	19	12	18	18	17	23	18	12	20
Cutting down on company get-togethers	14	10	21	14	11	17	10	7	18	14	12	12	6	20
Reduction / cancellation of personal training / development courses allowance	13	10	14	16	16	18	9	6	8	11	12	15	7	13

Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

## Actions during tight economic situation 2/2

Q: During the tight economic situation, would you say your company took any of the following actions?  
(Please select all that apply)

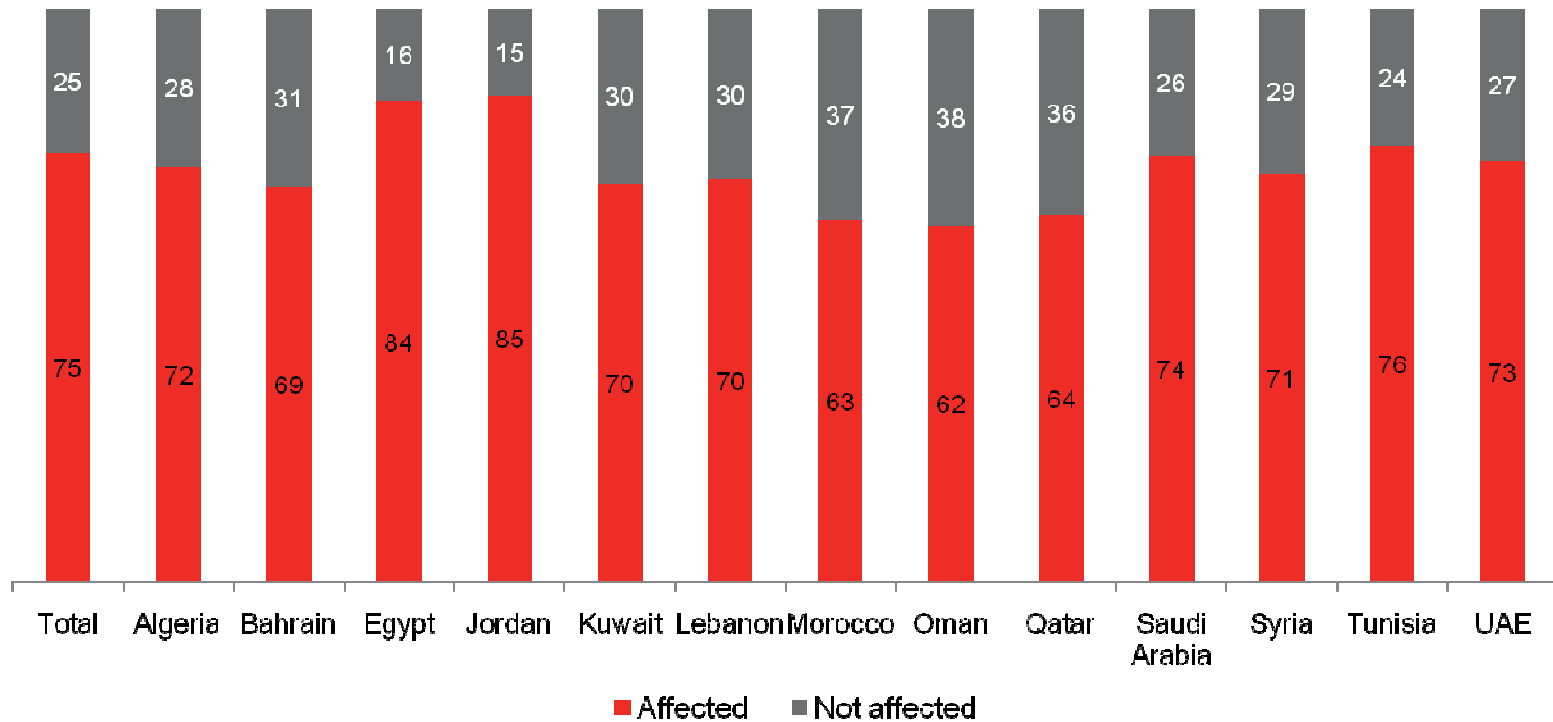
(continued)	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
Reduction / cancellation of personal training / development courses allowance	13	10	14	16	16	18	9	6	8	11	12	15	7	13
Giving only a partial bonus / reduction in bonus	13	8	18	15	14	12	9	11	18	12	13	13	14	12
Reduction/cancellation in other employee benefits	12	10	13	14	12	13	10	8	8	10	12	14	6	13
Revising salary and compensation contracts to a lower value for existing employees	10	7	11	11	8	13	8	6	13	8	8	9	8	13
Reduction / cancellation of holiday allowances / foreign trips	7	7	4	7	6	8	4	5	3	5	6	9	3	6
Reduction / cancellation of children's education allowance	4	2	4	4	2	5	3	3	3	3	3	5	1	4
Reduction / cancellation of stock options	3	2	3	3	3	5	2	2	4	3	3	4	1	3
None / Don't know	29	44	24	28	26	27	38	40	31	29	34	40	31	19

Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

## Personal effect of the economic situation

- Respondents from Egypt (84%) and Jordan (85%) are the most personally affected by the economic situation.

Q: Were you / are you still personally affected by the economic situation?



Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

## Effects of tight economic situation 1/2

Q: Please tell us if any of the following has affected you personally due to the current economic situation.  
(Please select all that apply)

	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
Increase in my workload / responsibilities	43	32	47	39	48	46	30	34	47	43	45	37	28	49
Promotion which was deserved was not given	28	29	30	27	31	33	18	21	31	20	33	29	27	29
Reduction / cancellation of bonus	19	13	28	21	19	21	17	14	15	21	18	19	15	22
Reduction / cancellation of increment	18	11	30	18	20	19	7	11	28	17	17	15	17	25
Lowering of additions to my basic salary (housing allowance, transport allowance, etc...)	16	13	18	18	16	13	11	15	12	14	17	18	12	17
Reduction / cancellation of commissions / incentives	15	13	13	18	17	13	9	16	13	12	18	19	14	14
Reduction/cancellation in other employee benefits	13	14	14	16	13	15	6	8	8	12	13	13	6	14
Lowering of my basic salary	13	12	8	12	10	12	9	9	9	9	11	9	12	14
Reduction / cancellation of personal training / development courses allowance	11	13	12	14	13	11	6	6	11	9	12	17	10	10

Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

## Effects of tight Economic Situation 2/2

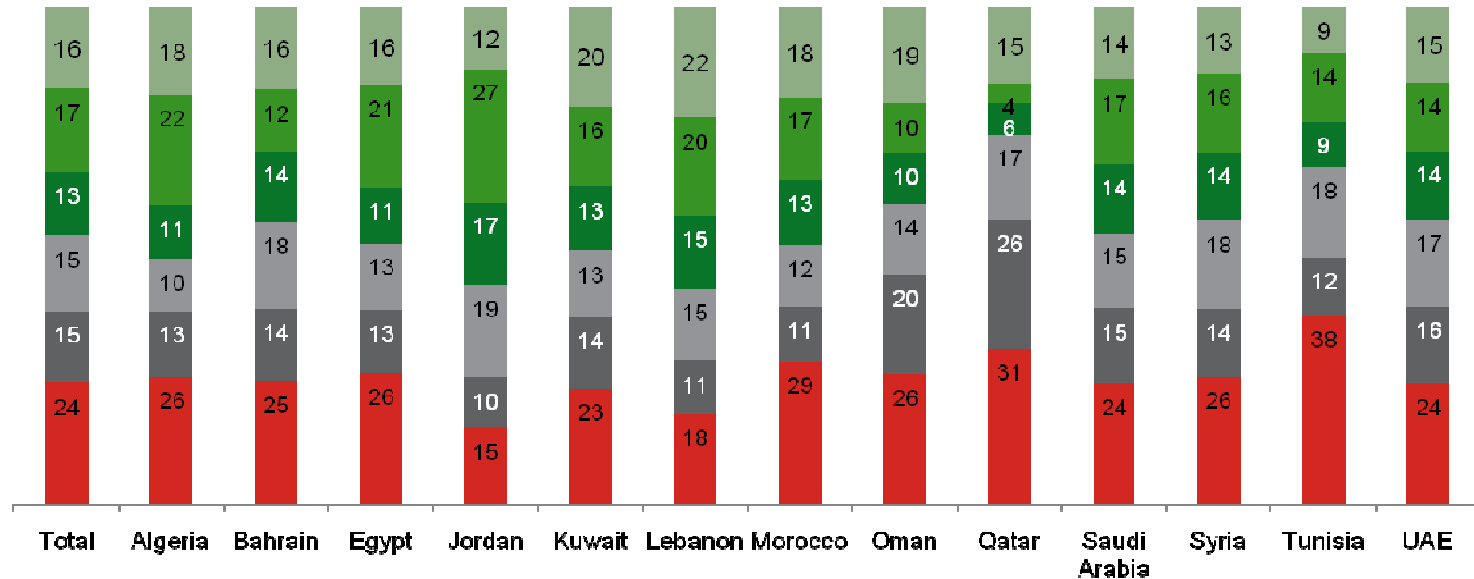
Q: Please tell us if any of the following has affected you personally due to the current economic situation.  
(Please select all that apply)

(continued)	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
Lost my job	7	6	8	7	6	6	5	5	5	7	6	5	8	9
Reduction / cancellation of holiday allowances / foreign trips	6	7	4	6	6	8	1	5	6	6	5	13	5	5
Reduction / cancellation of children's education allowance	3	3	6	3	3	2	1	2	2	3	3	5	0	3
Reduction / cancellation of stock options	2	2	4	3	2	3	0	1	3	3	2	4	1	2
Other	11	17	10	12	15	11	12	14	10	8	11	13	13	9

Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

# Feelings towards Current Climate

Q: Which of the following best sums up your feelings towards the current climate in the job market? Select the one that best describes the way you feel.



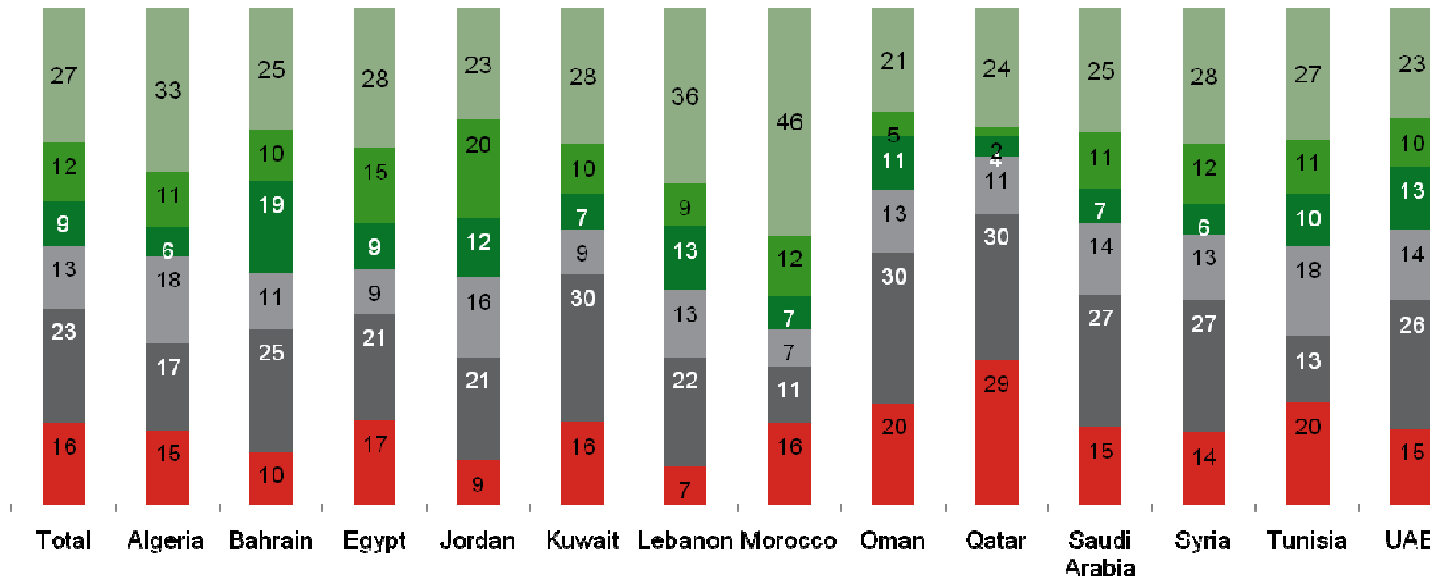
- I am very optimistic that there will still be robust economic growth and plenty of jobs available in my country next year
- I think salaries will continue to rise and the job market in my country will continue to be robust with strong demand for professionals
- I think that the job market in my country of residence will be even more competitive than today especially as high calibre talent who have lost jobs in other markets try to relocate to my country
- I think companies will continue to hire at the same pace and volume but salaries will decline across the board.
- I am quite pessimistic. I think there will be fewer jobs in the market than today and that salaries will also decline.
- Don't know/ None of the above.

Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)



# Effect of Global Trends

Q: How do you feel global salary and unemployment trends will affect your country of residence?  
Select the one that best describes the way you feel.



- Salaries will continue to increase, the pace of hiring will be maintained at a very robust level and there will not be any lasting negative impact on local salary/employment trends
- Middle East salary and employment levels will not be affected beyond what we have already seen to date
- There will be a flight of talent to the Middle East which will cause salaries to decline as the number of top professionals increase
- There will be a little more downsizing and scaling back in hiring in the coming year and then my country's economy will quickly stabilize like the previous years
- There will be substantial firings and downsizings to come
- Don't know/None of the above.

Base: Total (8,565), Algeria (516), Bahrain (97), Egypt (1229), Jordan (570), Kuwait (332), Lebanon (289), Morocco (420), Oman (119), Qatar (289), KSA (1677), Syria (247), Tunisia (143), UAE (1646)

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