

TOP INDUSTRIES IN THE MIDDLE EAST

October 2008

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Background of the research

- The Top Industries in the Middle East research exercise was conducted to gauge consumer opinions about various industry sectors in their countries of residence
- Key issues like most preferred industry, those offering best benefits and those offering a good work-life balance were addressed
- This helps us understand consumer and employee sentiments with regard to each industry which will point out industries which are likely to attract talent
- Another major indicator was the proportion of employed people who had changed their industry or are likely to do so in the near future
- This indicates an impending shortage of talent for industries facing such erosion and a possible surfeit of qualified employees for those industries perceived to be most attractive
- The research was conducted online among 2,927 respondents between 20th of August and 21st of September

Summary (1/3)

- When viewed on the overall or across each country, it is extremely clear that not only do those industries featuring in the top in terms of being most preferred and best paying overlap to a great extent, but are also most capable of attracting the best talent globally.
- Most prominent amongst these industries across countries were Banking / Finance, Oil, Gas & Petrochemicals, IT and Telecommunications.
- On the other hand, Education / Academia is not only seen to be lagging in terms of salary & benefits, but as a sector, it is seen to be struggling to stay financially viable. The only good thing about this sector is seen to be its ability to maintain a healthy work-life balance.

Summary (2/3)

- This clearly points to the fact that industries which are not competitive on the financial aspects are most likely to suffer in terms of being able to attract talent either locally or globally and will eventually struggle to stay afloat.
- It is sectors like Banking / Finance & Oil, Gas & Petrochem which will outshine others in terms of attracting talent for some time to come given that they not only perform well on financials but also on good work life balance.
- Having said that however, Banking / Finance whilst being highly sought after by those considering a change in industry also seem to be experiencing some internal churn from those currently employed within the sector.
- Whilst the compensation for Government / Civil service and Education sectors leave much to be desired, they perform extraordinarily well on work life balance.

Summary (3/3)

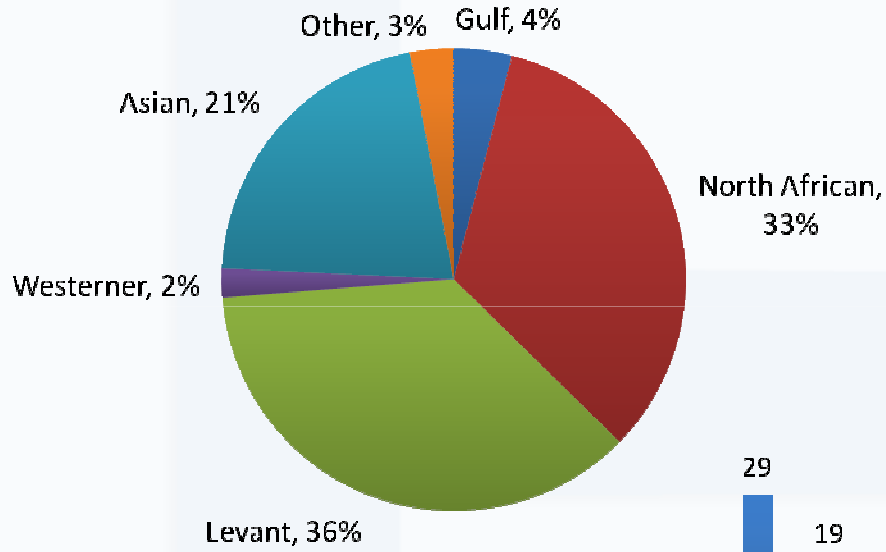
- Overall though Government service is still favorably regarded across most countries except Egypt which is more negative rather than positive.
- As an overall as well as across countries, at least the top two most preferred industries also have the a high number of skilled labour seeking positions and employers seeking to fill those positions within that industry – a sign of a healthy economy.
- The vast majority (57%) of the workforce have either changed or are considering a change in industry. This could be due to increasing competition at the workplace and a need to excel or simply because of the current global economic instability which is causing people to consider shifting to better paying industries. It is none the less alarming.
- Better salaries, career growth and better benefits and bonuses were the top 3 reasons for employees across the region are considering a change in industry. This should serve as a guide to employers on how to retain talent within the industry and stop them from migrating to more lucrative ones.

UAE – A key observation

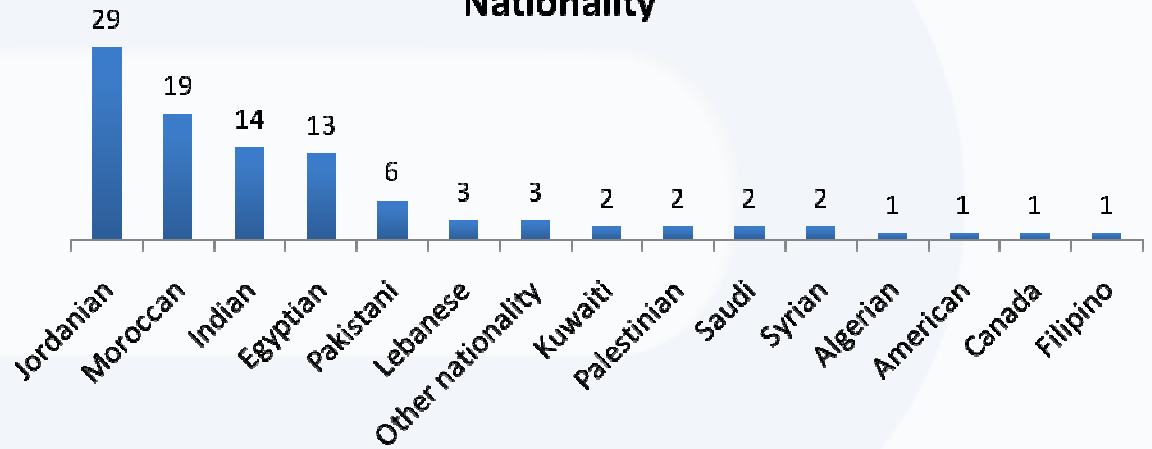
- In the UAE, Banking / Finance took a back seat to Construction and Real Estate in terms of growth.
- However, Construction emerged as the main sector lacking domestic talent. This is especially critical in line with the rapid real estate developments taking place across the UAE.
- Despite the growth of the Construction sector, it was seen to be struggling to cope financially - possibly due to increasing costs of raw materials and labour.

Respondent Profile

Nationality Groups

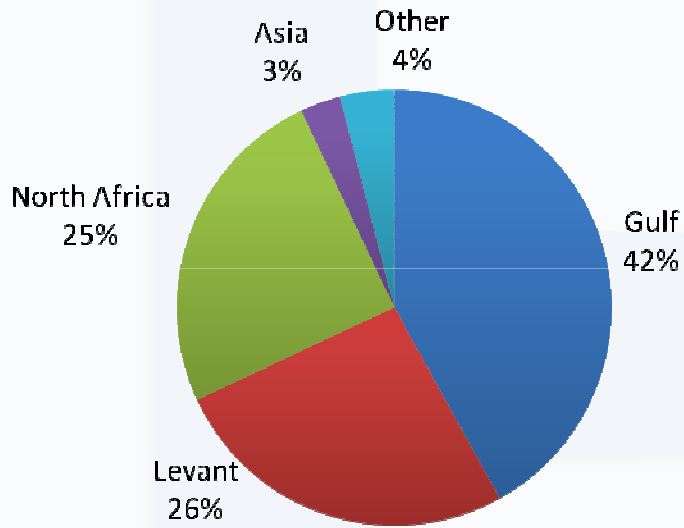


Nationality

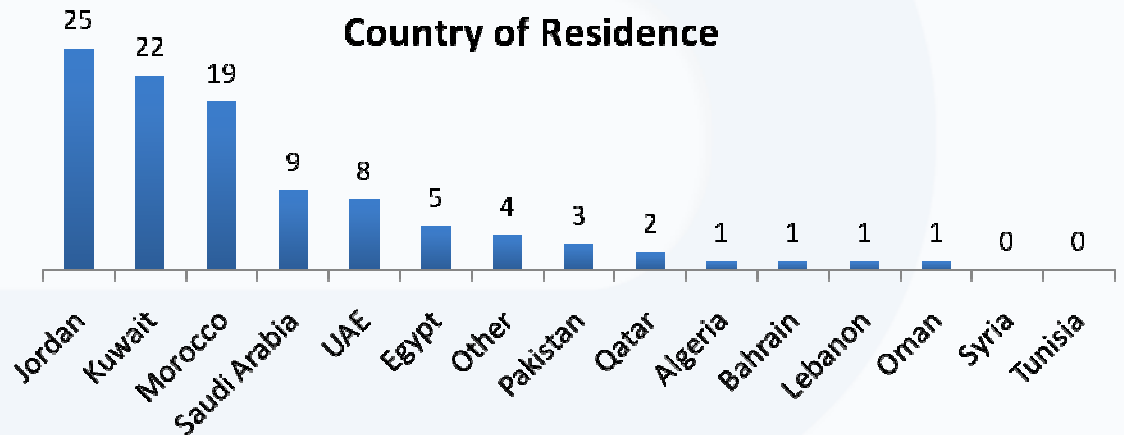


Respondent Profile

Country Grouped

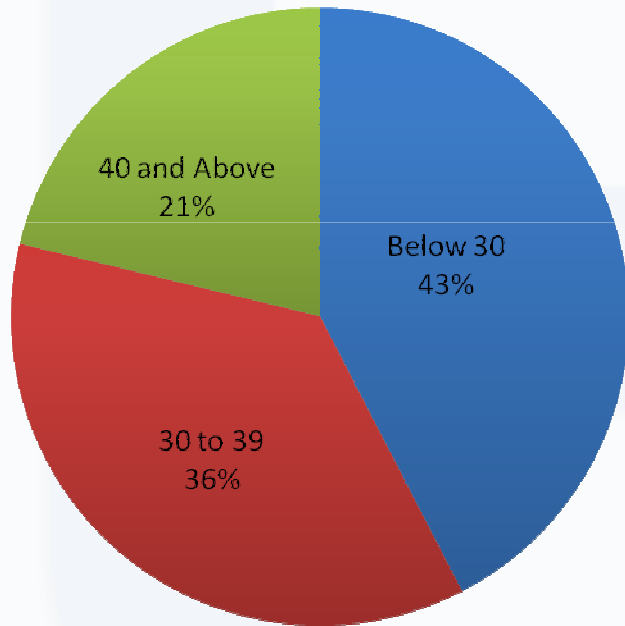


Country of Residence

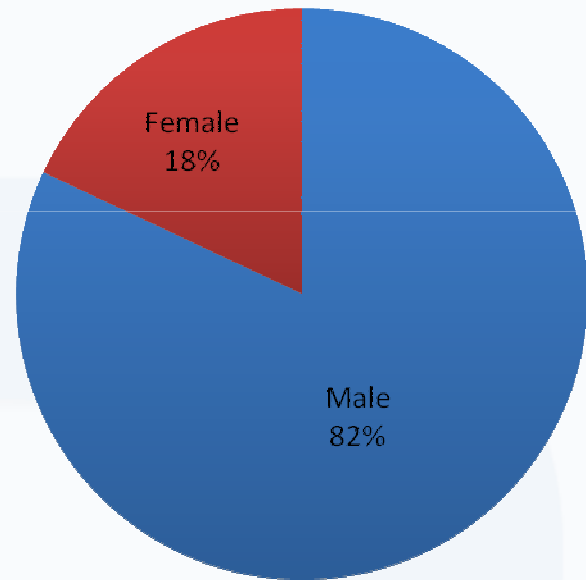


Respondent Profile-Personal

Age

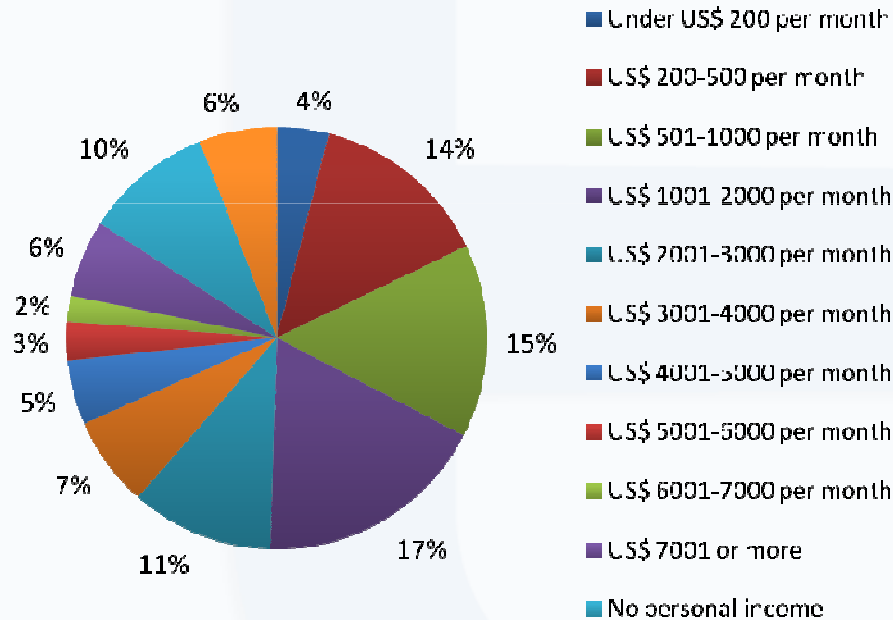


Gender

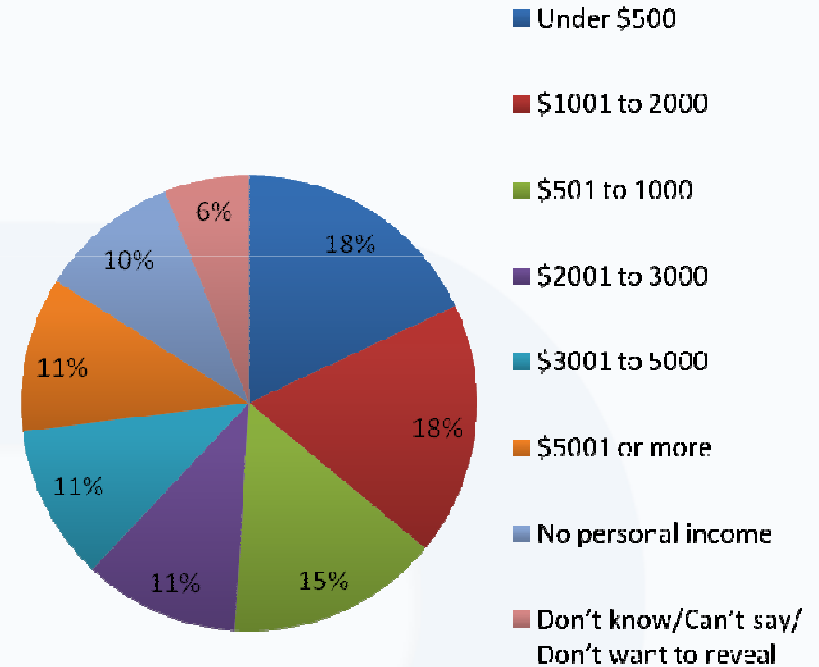


Respondent Profile-Income

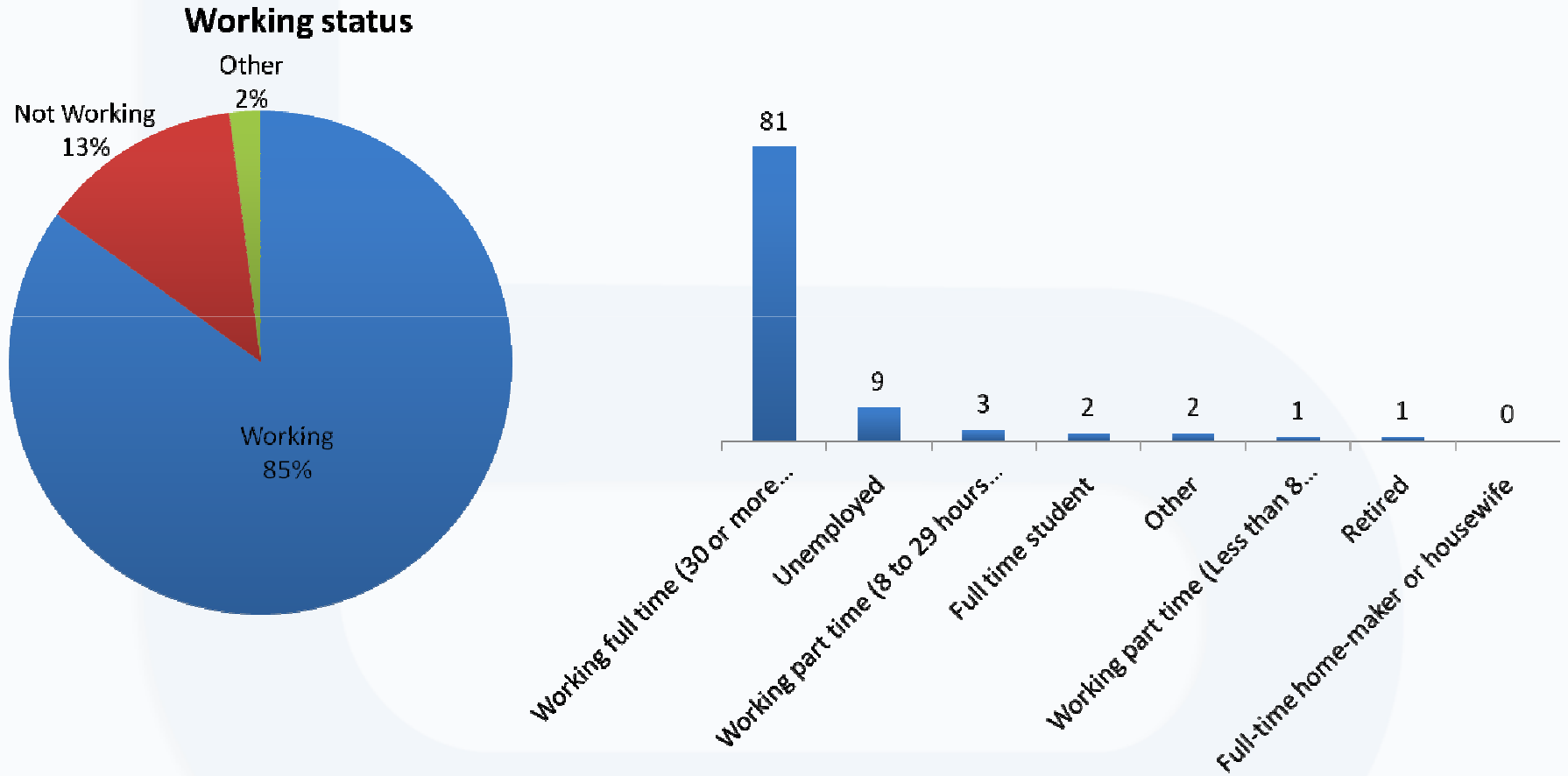
Income



Income groups



Respondent Profile-Working status



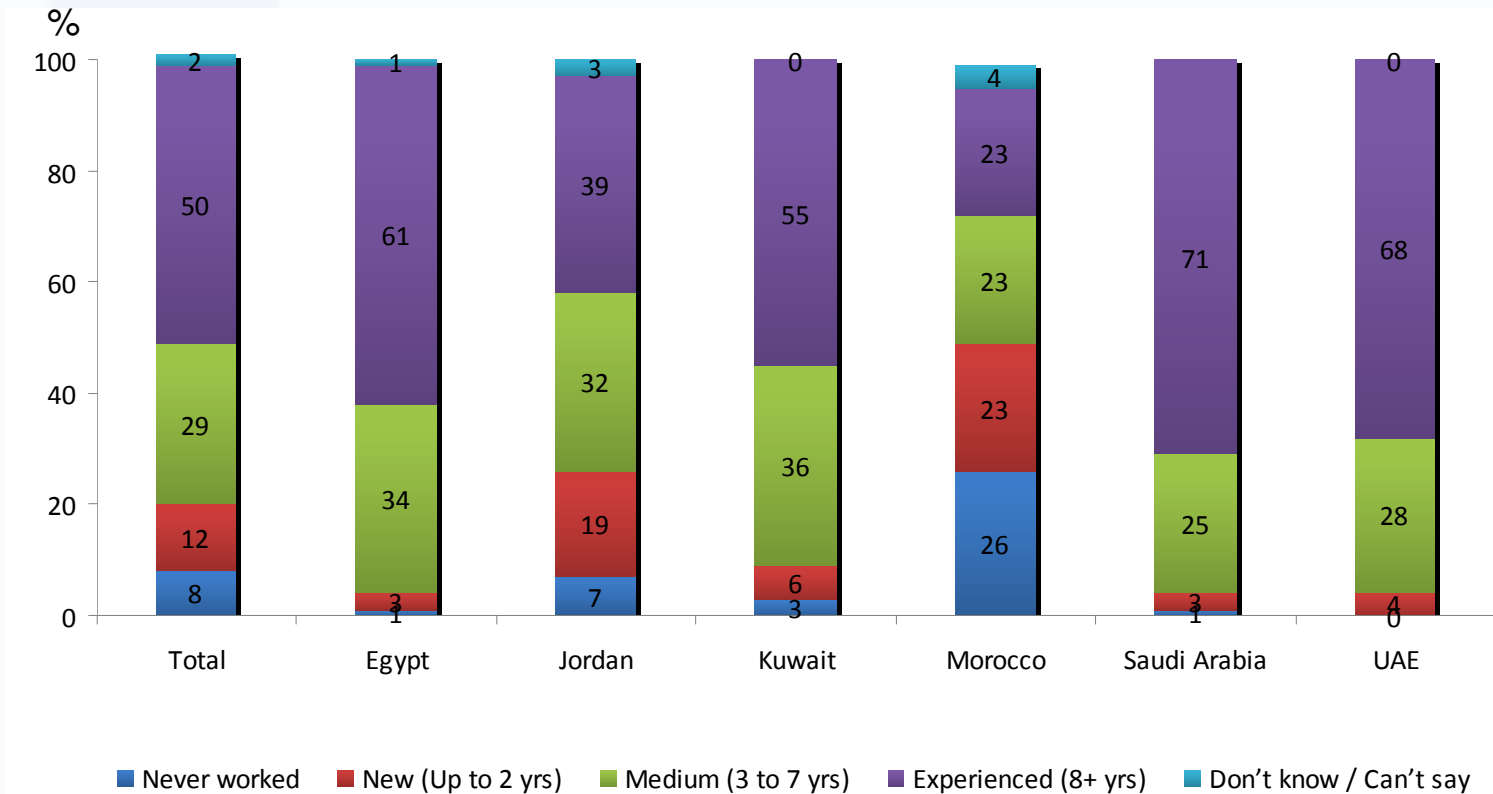
Total Work Experience

Q: How many years have you worked in total? [If you have taken a break, please count years worked before and after your career break]

Note: Results for Egypt are to be interpreted with caution due to small base sizes

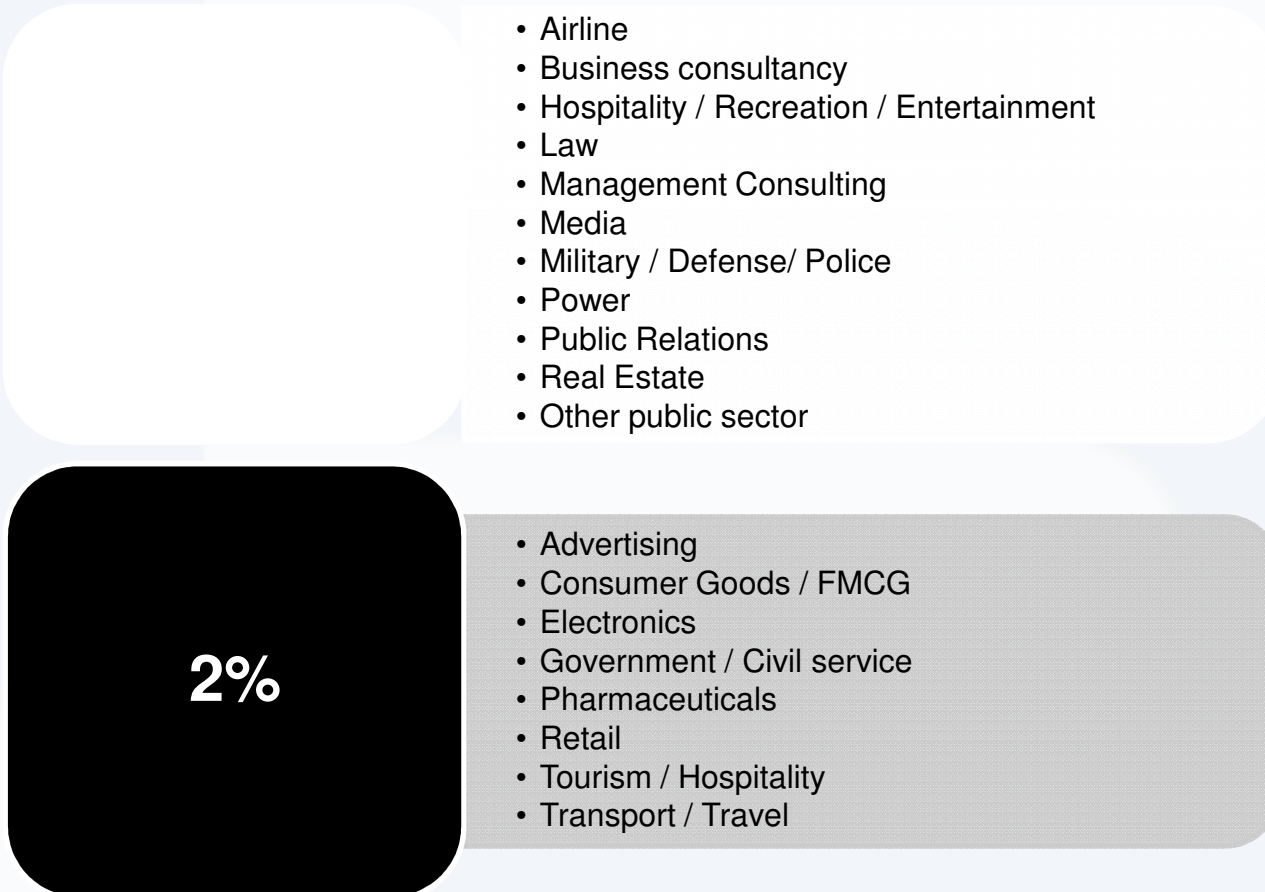
- Relative to other countries, KSA & UAE seem to be attracting more experienced talent whereas Jordan seems to have the most junior workforce.

Base: All 2927 137 736 640 551 262 232



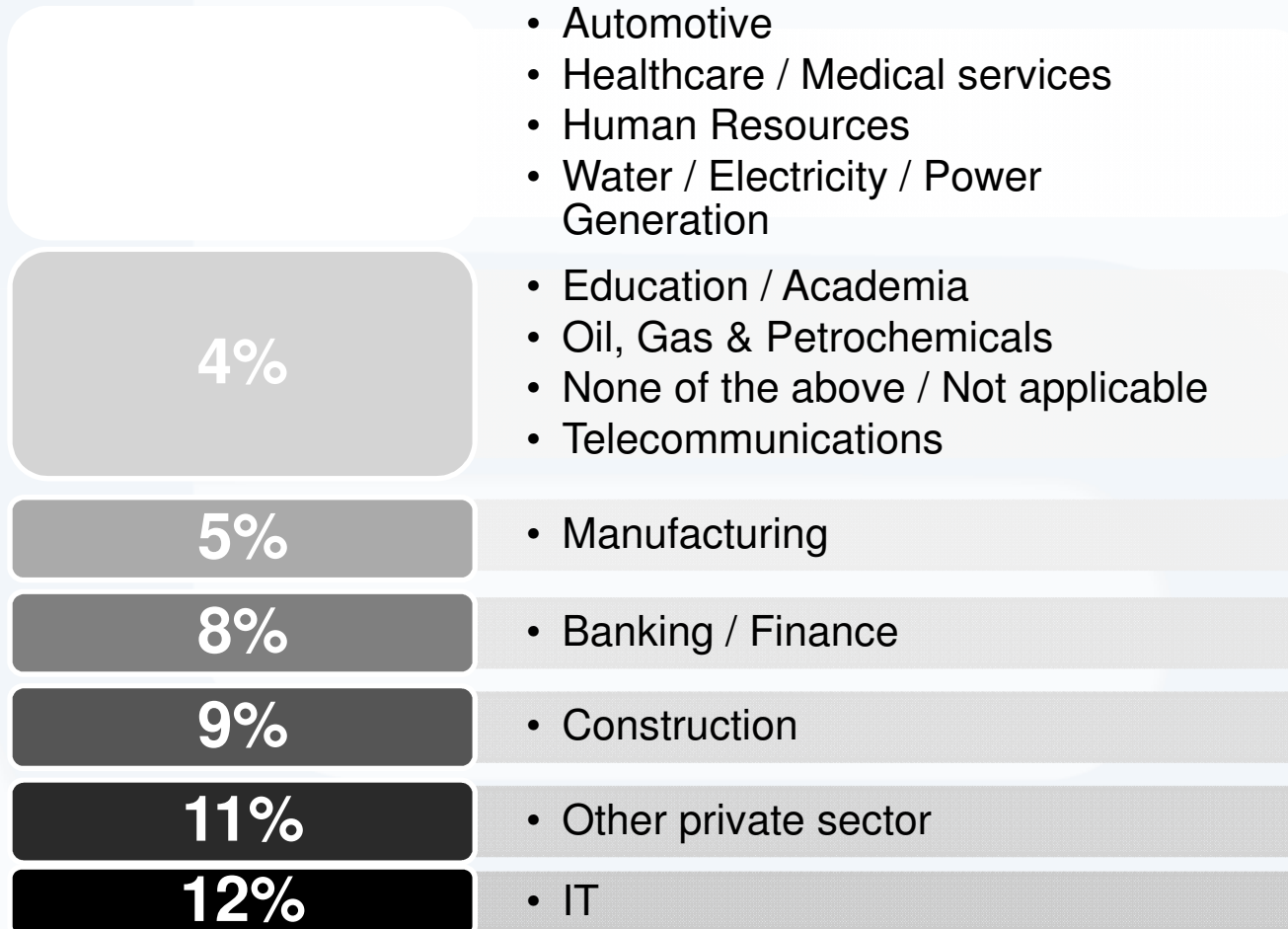
Industries currently worked in

Q: And in which of the following industries do you currently work? If you are currently on a career break, please tell us about your most recent industry.



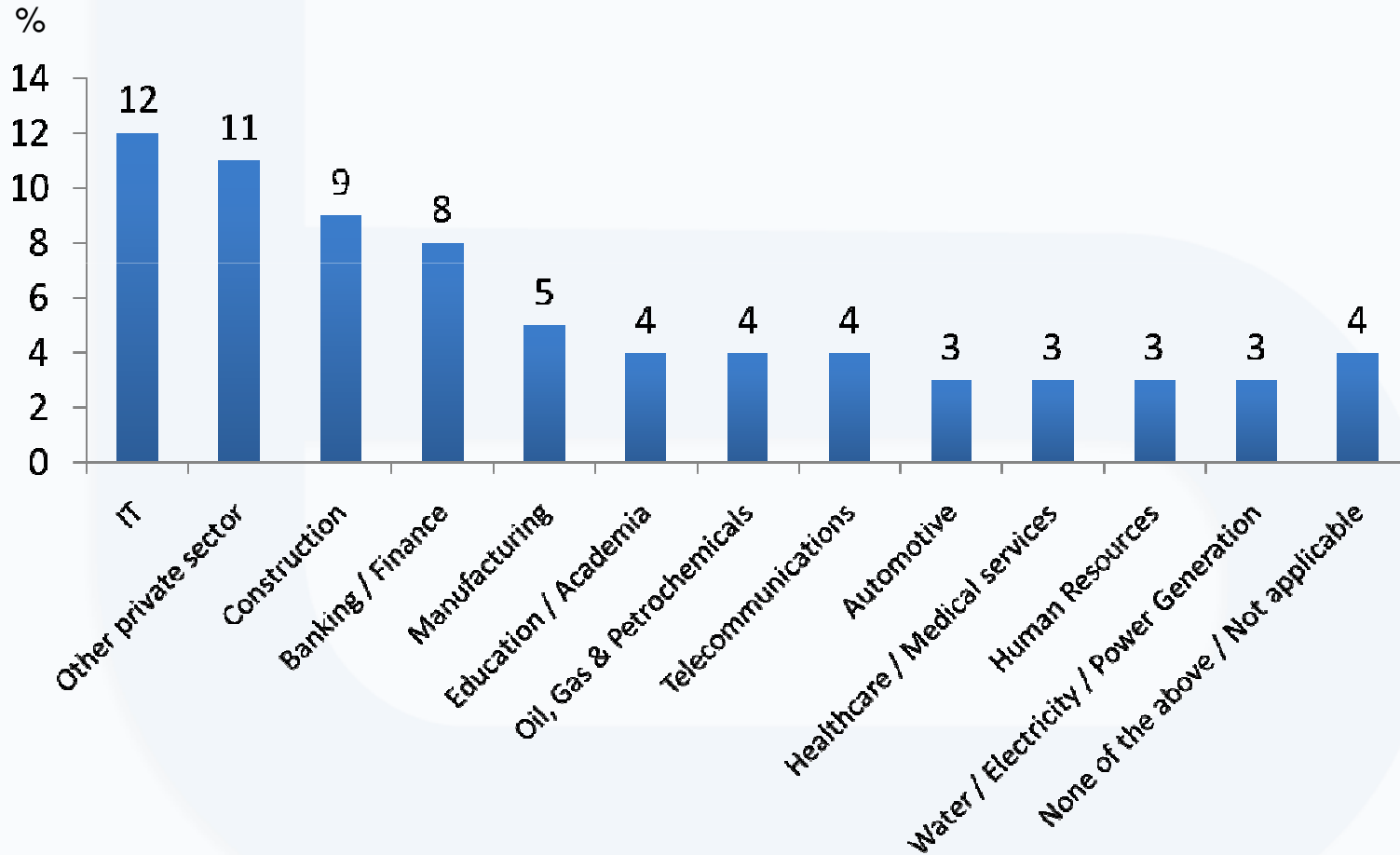
Industries currently worked in

Q: And in which of the following industries do you currently work? If you are currently on a career break, please tell us about your most recent industry.



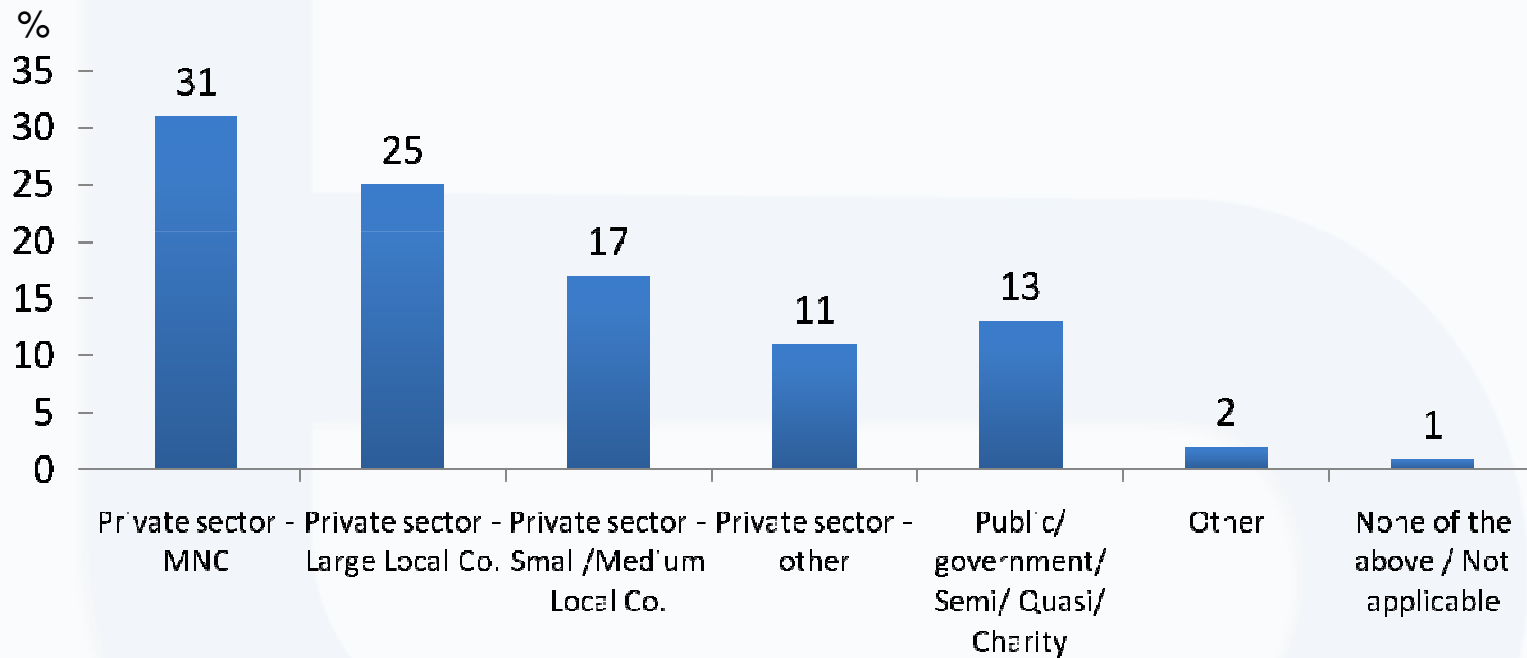
Industries currently worked in

Q: And in which of the following industries do you currently work? If you are currently on a career break, please tell us about your most recent industry.



Sector currently worked in

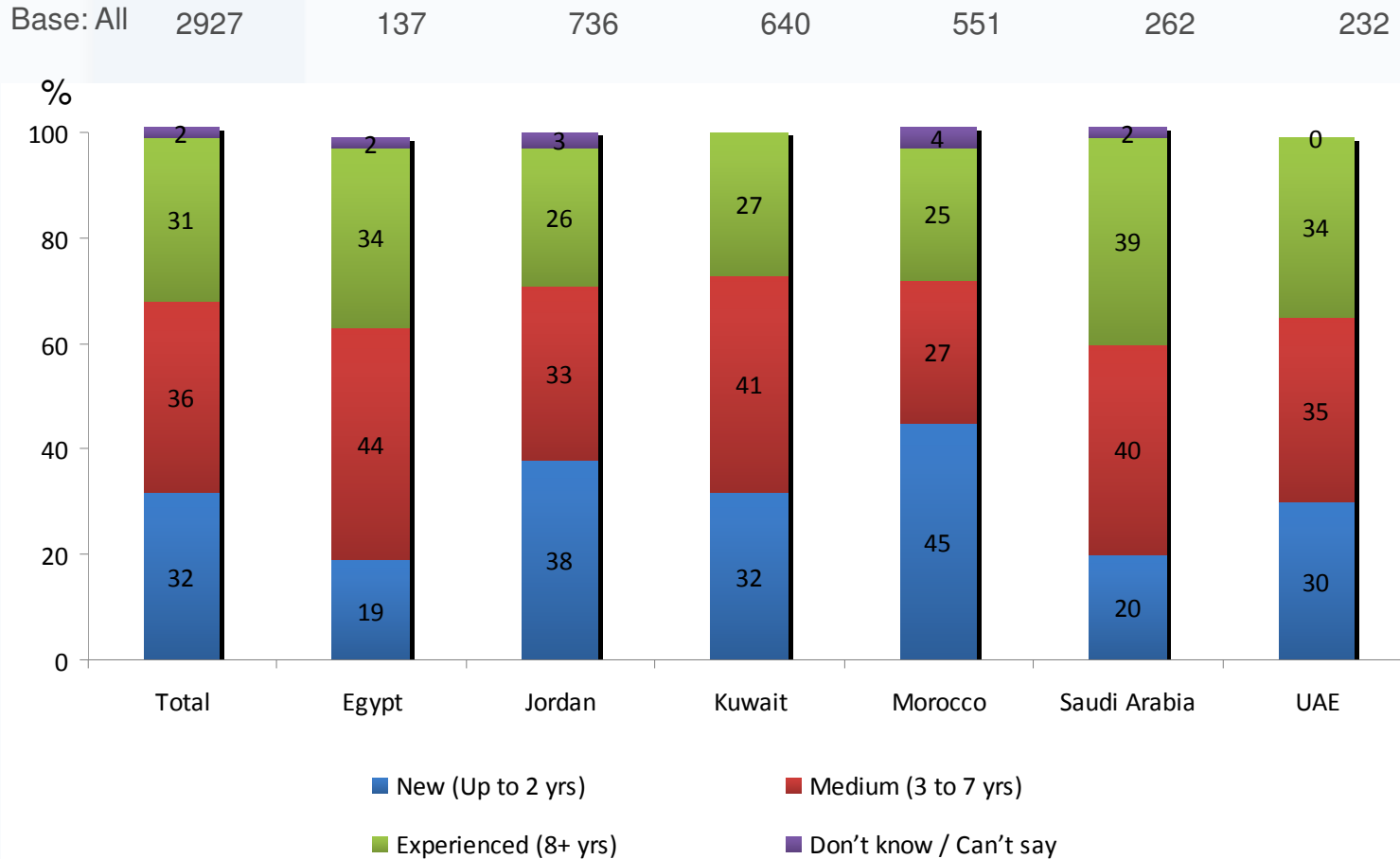
Q: In which of the following sectors do you currently work? If you are currently on a career break, please tell us about your most recent sector.



Current Industry Work Experience

Q: For how many years have you worked in your current industry? [If you have taken a break, please count years worked in current industry before and / or after your career break]

Note: Results for Egypt are to be interpreted with caution due to small base sizes

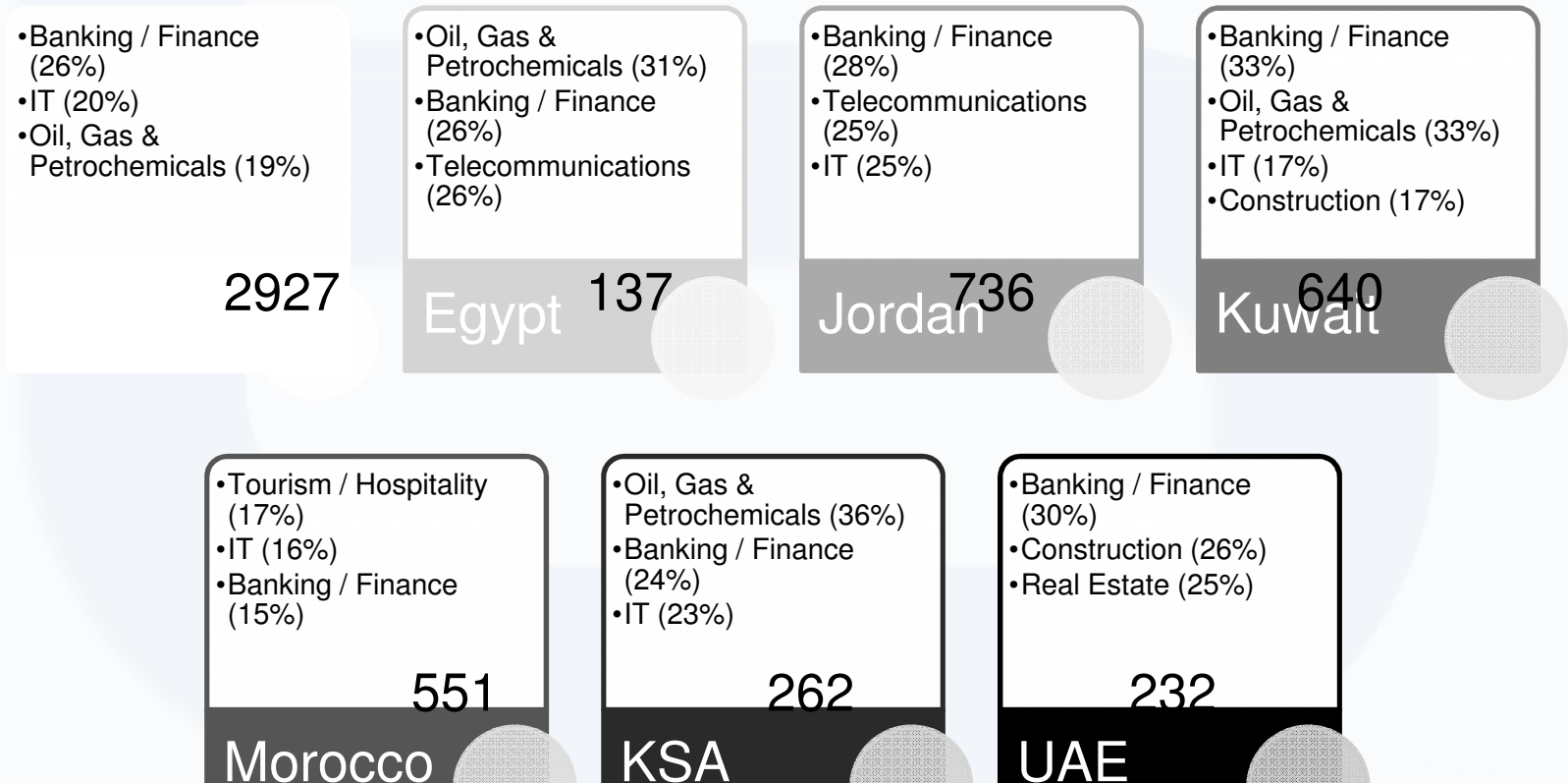


Most preferred industries by country

Q: Which would you say are the MOST preferred industries to work in, in your country of residence? [Please select up to 3 responses]

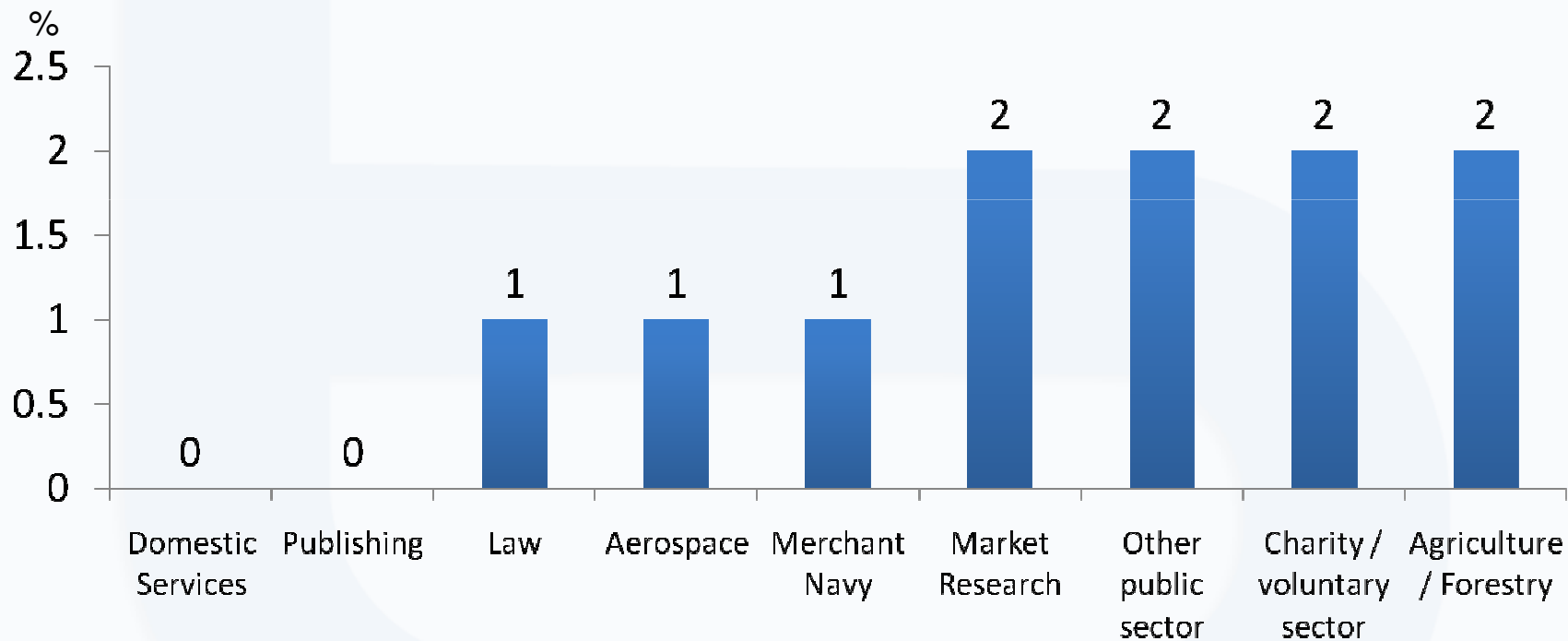
Note: Results for Egypt are to be interpreted with caution due to small base sizes
Figures on the right of total / country denote base sizes

- Top industries emerged to be Banking & Finance, IT , Oil, Gas & Petrochemicals .
- For Morocco, the top industry was Tourism / Hospitality and the UAE saw Construction and Real Estate in the Top 3.



Least preferred industries

Q: Which would you say are the MOST preferred industries to work in, in your country of residence? [Please select up to 3 responses]



Highest paying industries by country

Q: Which industries do you feel are the highest paying in your country of residence? [Please select up to 3 responses]

Note: Results for Egypt are to be interpreted with caution due to small base sizes
Figures on the right of total / country denote base sizes

- Banking / Finance and Oil, Gas & Petrochemicals emerged to be the top paying industries.

- Banking / Finance (35%)
- Oil, Gas & Petrochemicals (28%)
- Airline, IT, Telecommunications (19% EACH)

2927

Morocco

- Oil, Gas & Petrochemicals (47%)
- Telecommunications, Banking / Finance (32% EACH)
- Airline, IT (20%)

Egypt 137

KSA

- Banking / Finance (36%)
- Airline (24%)
- Telecommunications, IT (20% EACH)
- Real Estate (15%)
- Construction (14%)

Jordan 736

UAE

- Oil, Gas & Petrochemicals (50%)
- Banking / Finance (43%)
- IT (16%)
- Telecommunications (15%)
- Airline (13%)

Kuwait 640

- Airline (30%)
- Banking / Finance (22%)
- Real Estate (17%)
- Telecommunications (16%)
- IT, Tourism / Hospitality (14% EACH)

551

- Oil, Gas & Petrochemicals (47%)
- Banking / Finance (40%)
- Telecommunications (24%)
- IT (23%)
- Construction (13%)

262

- Oil, Gas & Petrochemicals (42%)
- Banking / Finance (31%)
- Real Estate (27%)
- Construction (22%)
- Airline (18%)

232

Best benefits by country

Q: Which industries do you feel provide the greatest benefits to employees in your country of residence? [Please select up to 3 responses]

Note: Results for Egypt are to be interpreted with caution due to small base sizes
Figures on the right of total / country denote base sizes

- Banking / Finance & Oil, Gas and Petrochemicals also top employers in terms of benefits offered.

- Banking / Finance (39%)
- Oil, Gas & Petrochemicals (29%)
- Airline (25%)
- Telecommunications (17%)
- Government / Civil service (15%)

2927

- Oil, Gas & Petrochemicals (55%)
- Banking / Finance (39%)
- Airline (33%)
- Telecommunications (23%)
- Military/ Defense/Police (14%)

137

Egypt

- Banking / Finance (45%)
- Airline (29%)
- Telecommunications (24%)
- Military/ Defense/Police (17%)
- IT (16%)

736

Jordan

- Oil, Gas & Petrochemicals (51%)
- Banking / Finance (42%)
- Airline, Government / Civil service (18% EACH)
- Telecommunications

640

Kuwait

- Airline (32%)
- Banking / Finance (30%)
- Government / Civil service (15%)
- Telecommunications, Education / Academia (13% EACH)

551

Morocco

- Oil, Gas & Petrochemicals (49%)
- Banking / Finance (42%)
- Telecommunications (21%)
- Airline (18%)

262

KSA

- Oil, Gas & Petrochemicals (40%)
- Banking / Finance (31%)
- Airline (29%)
- Government / Civil service (25%)

232

UAE

Best worklife balance by country

Q: Which industries do you feel are the most attractive to work in when it comes to maintaining a work life balance?
[Please select up to 3 responses]

Note: Results for Egypt are to be interpreted with caution due to small base sizes
Figures on the right of total / country denote base sizes

- In terms of work life balance, two sectors that are not noteworthy whilst considering financials were now featured quite prominently. They are Government / Civil service and Education.
- Banking / Finance & Oil, Gas & Petrochem perform on financials as well as work life balance.

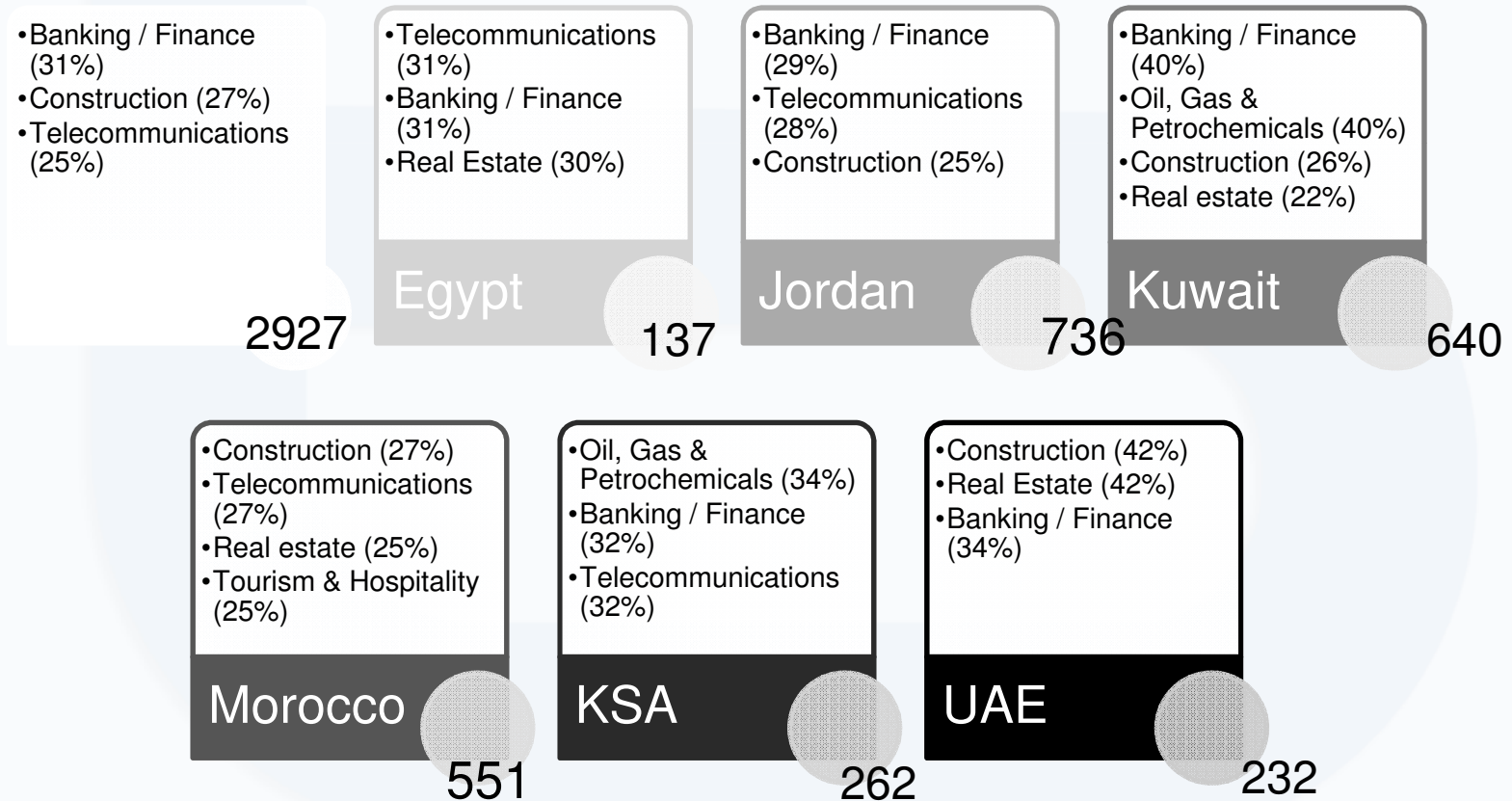


Strongest growth by country

Q: Which industries do you feel have recorded the strongest growth since last year in your country of residence? [Please select up to 3 responses]

Note: Results for Egypt are to be interpreted with caution due to small base sizes
Figures on the right of total / country denote base sizes

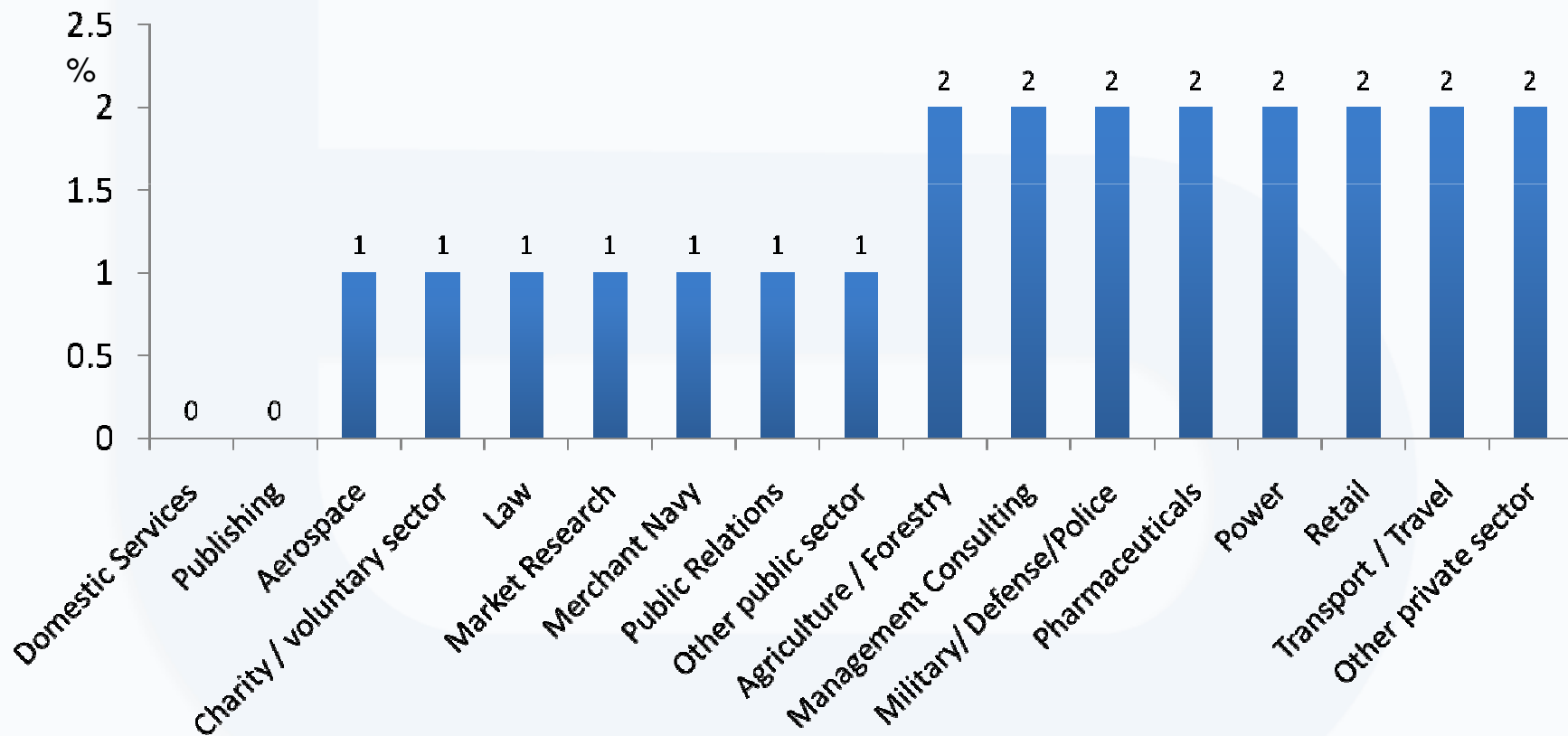
- In the UAE, Banking / Finance took a back seat to Construction and Real Estate in terms of growth.
- Overall though, Banking / Finance emerged on top.



Weakest growth by country

Q: Which industries do you feel have recorded the strongest growth since last year in your country of residence?
[Please select up to 3 responses]

Note: Sectors featuring here could be due to the lack of knowledge on the part of respondents or their relatively lower growth as compared to the top 3.

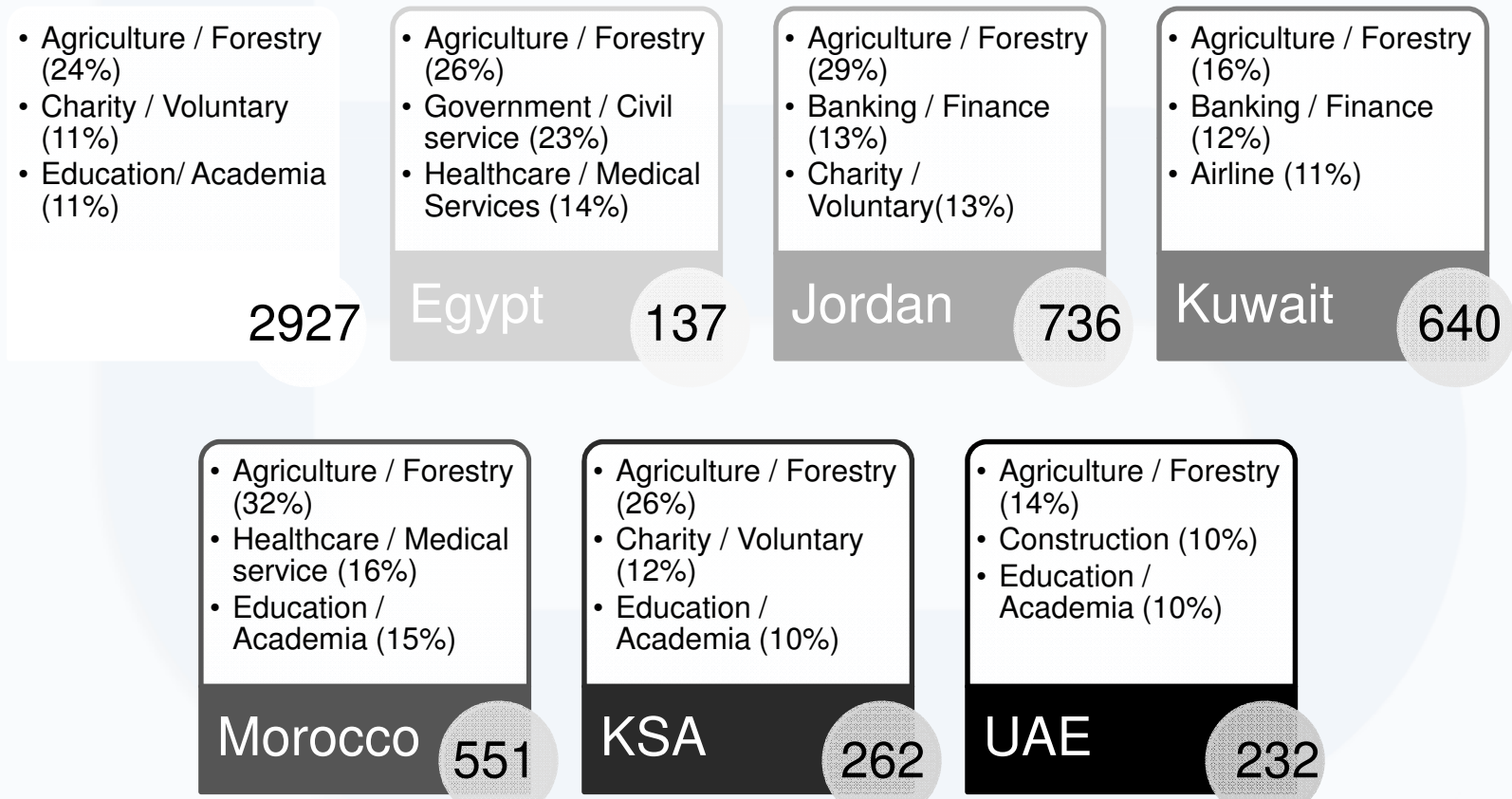


Struggling to stay financially viable...

Q: Which industries are struggling to stay financially viable in your country of residence today? [Please select up to 3 responses]

Note: Results for Egypt are to be interpreted with caution due to small base sizes
Figures on the right of total / country denote base sizes

- Agriculture / Forestry, Charity / Voluntary organisations and Education are struggling to stay financially viable overall.

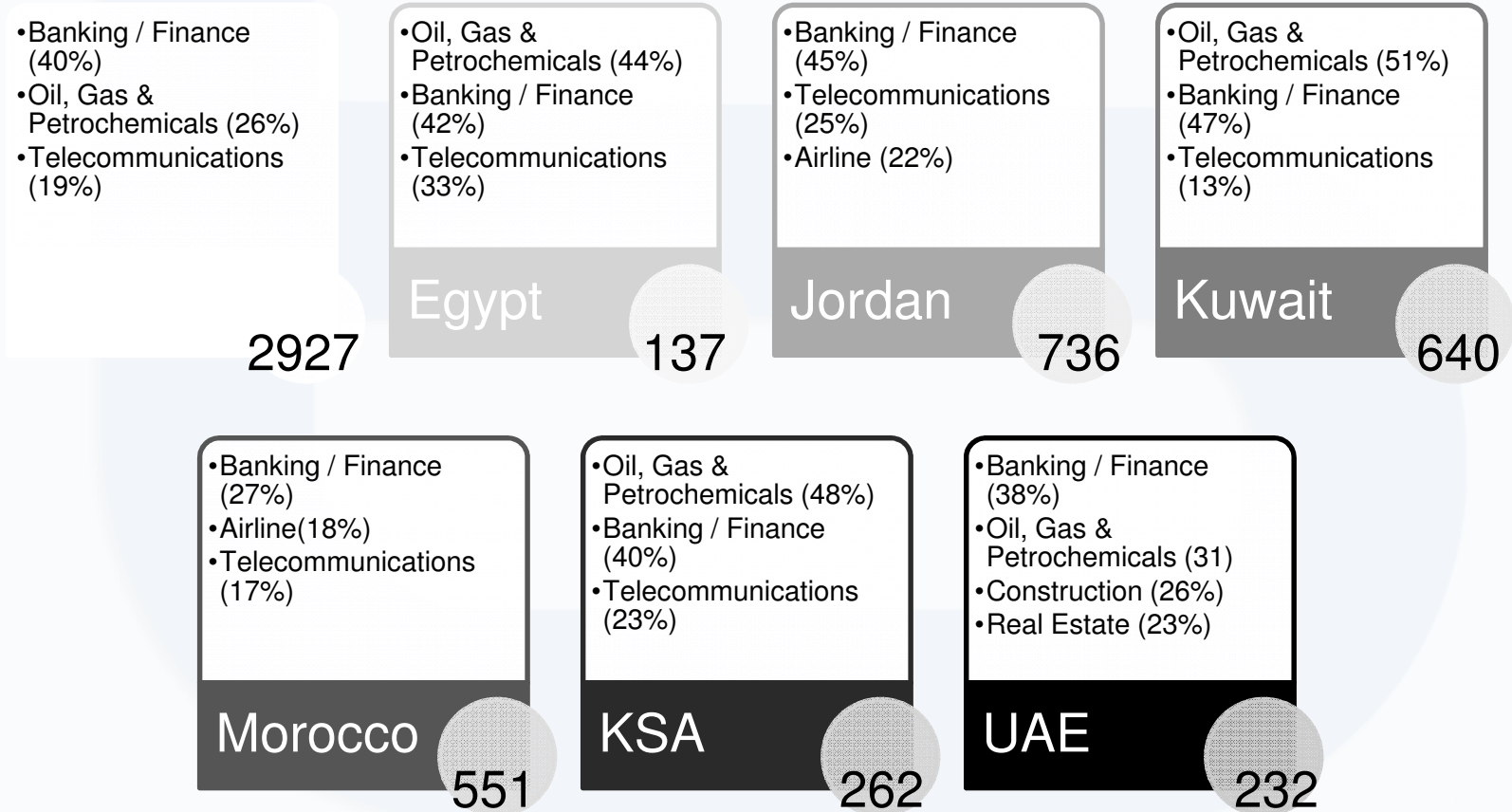


Best increments, bonuses & benefits

Q: As compared to economic growth of the industry annually, which industries do you feel provide the best annual increments, bonuses and benefits to employees? [Please select up to 3 responses]

Note: Results for Egypt are to be interpreted with caution due to small base sizes
Figures on the right of total / country denote base sizes

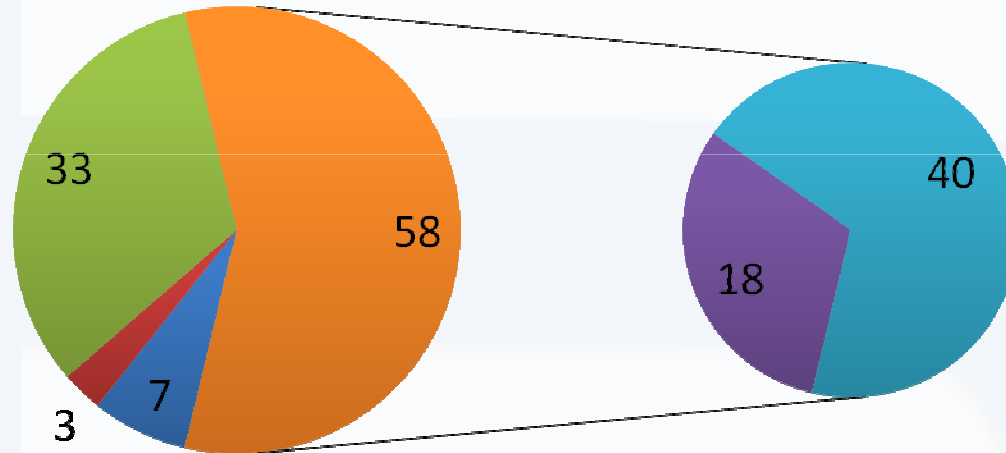
- Banking / Finance and Oil, Gas & Petrochem emerged as the top 2 employers when it comes to increments, bonuses & benefits.



Change of industry

Q: Have you changed your industry in the last 24 months or are you considering moving to a new industry?

- The vast majority have either changed or are considering a change in industry.
- A third of the population though will stick to their current industry.



- Not applicable / Don't know / Can't say
- I have just entered the workforce
- No, I have not changed / am not considering a change
- Yes, I have changed my industry in the last 24 months
- Yes, I am considering a change in industry

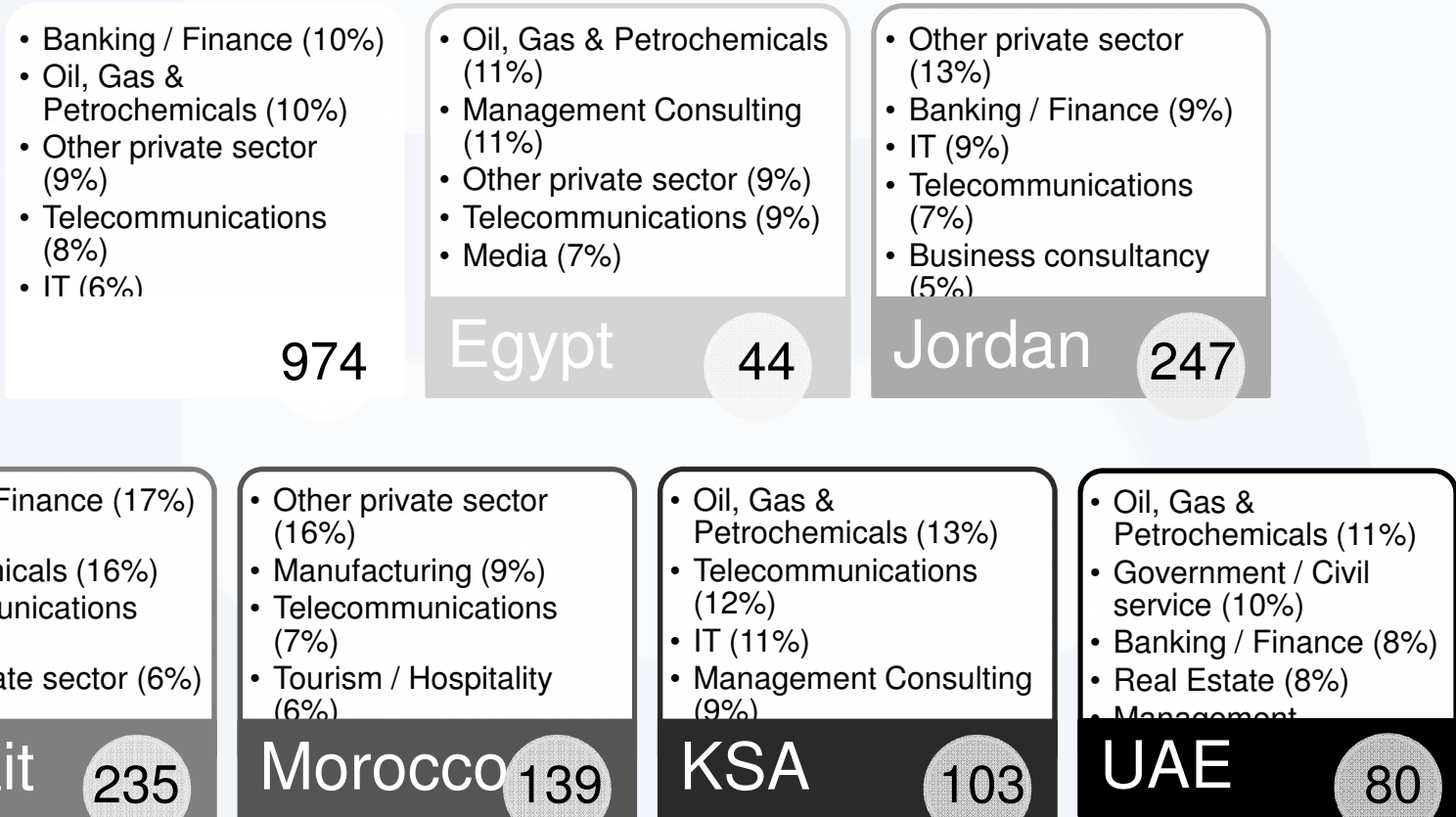
Top industries moving to

Q: To which industry are you considering moving to? [Please select one response]

Note: Results for Egypt are to be interpreted with caution due to small base sizes

Figures on the right of total / country denote base sizes

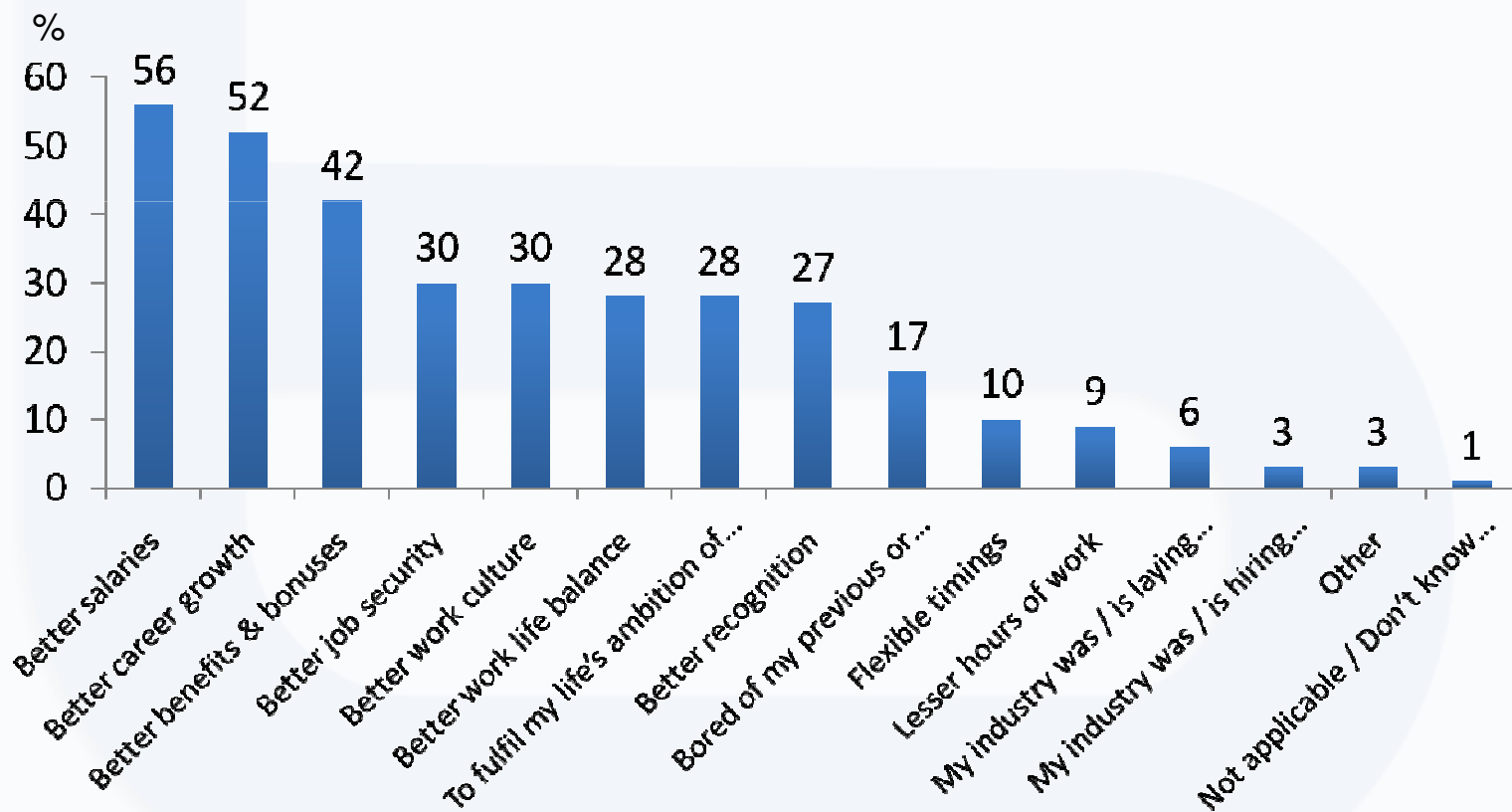
- Popular amongst industries people would like to move to are Banking & Finance, Oil, Gas & Petrochemicals and IT / Telecom.



Reasons for change

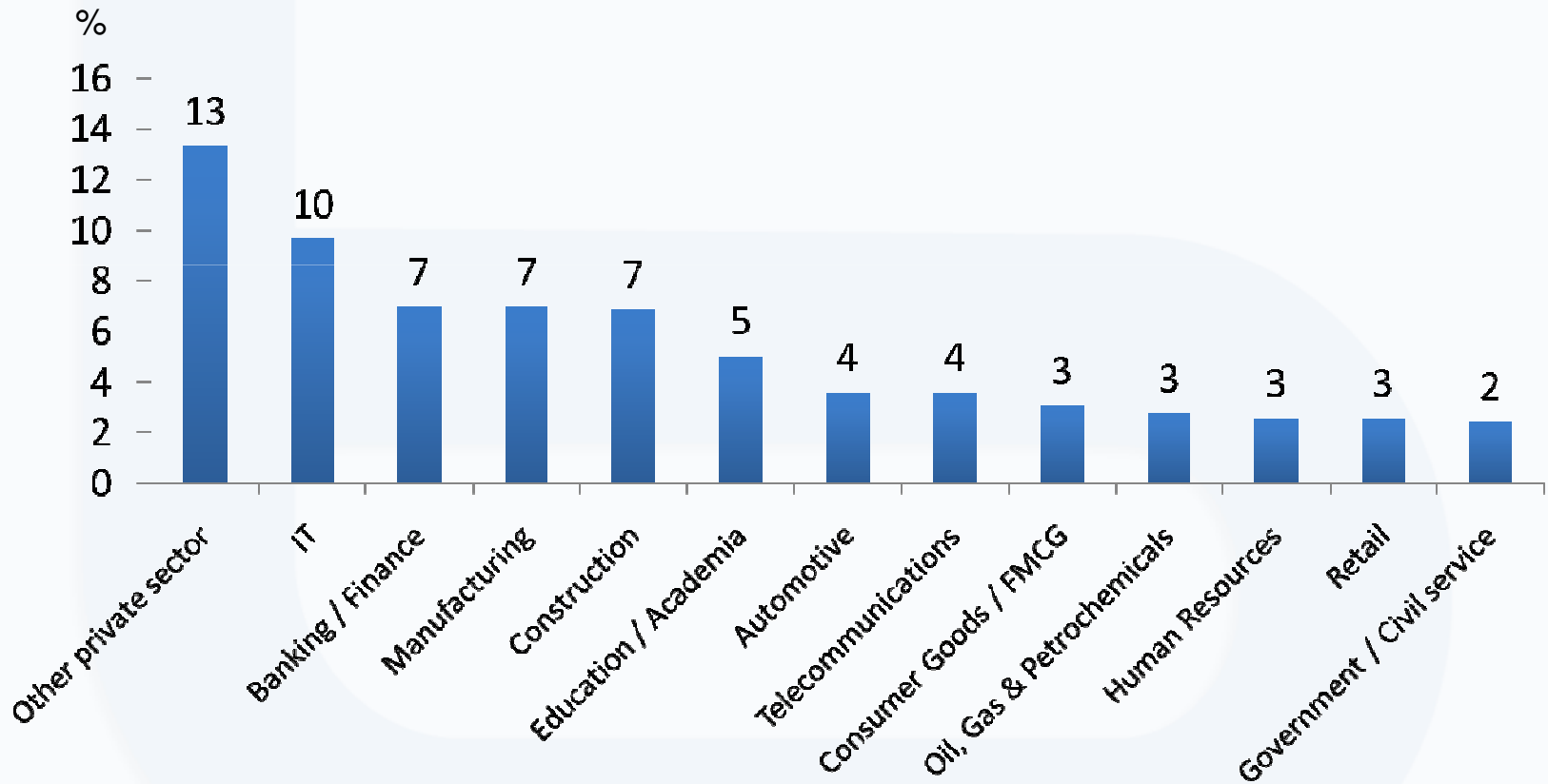
Q: Why have you changed or are considering this change in industry? [Please select all that apply]

- Better salaries, career growth and better benefits and bonuses were the top 3 reasons for employees across the region considering a change in industry.



Current industries of those who are considering a change in industry...

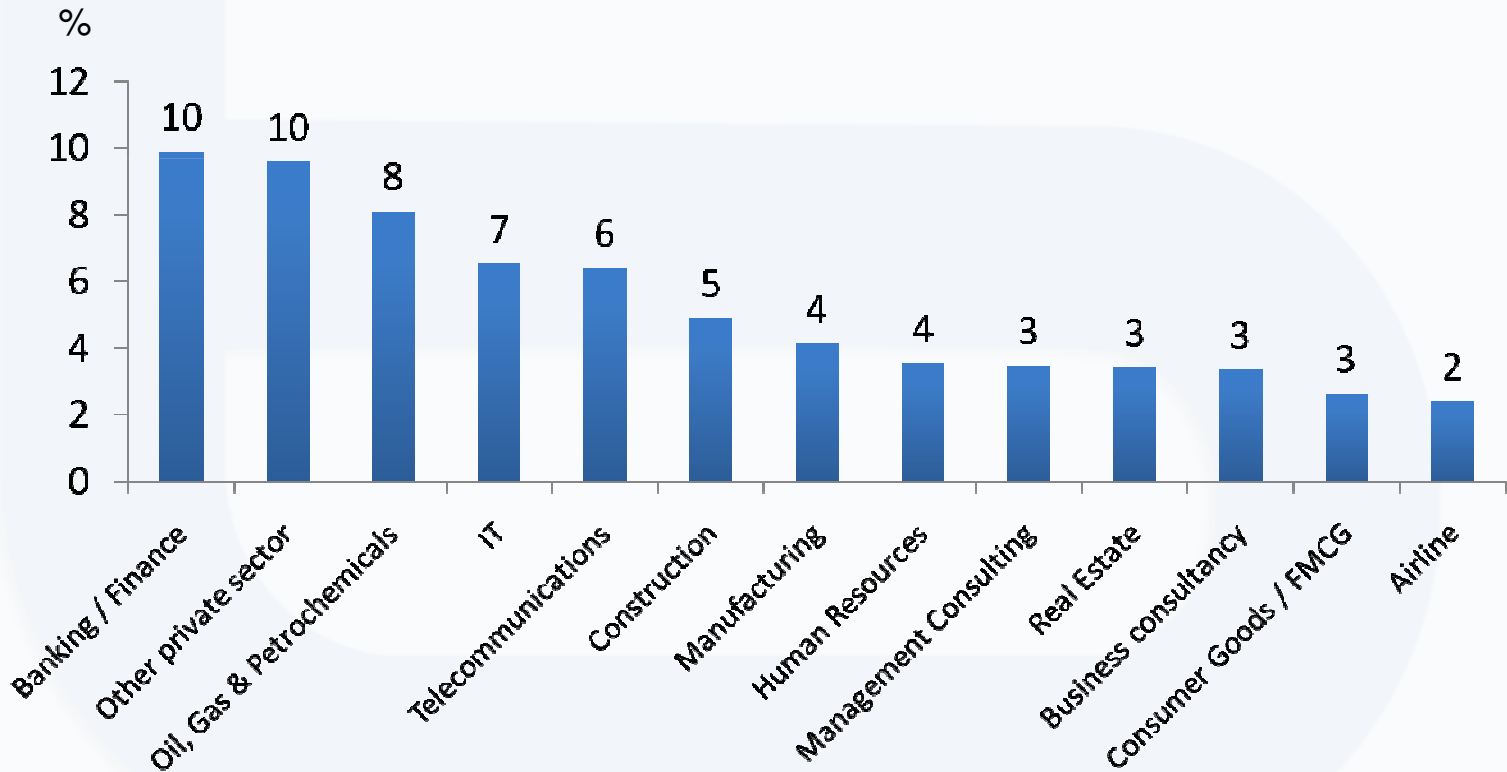
Q: And in which of the following industries do you currently work? If you are currently on a career break, please tell us about your most recent industry. (ONLY THOSE WHO ARE CONSIDERING A CHANGE)



Industries changed / considering a change to...

Q: And in which of the following industries do you currently work? If you are currently on a career break, please tell us about your most recent industry. (THOSE WHO HAVE ALREADY CHANGED)

Q: To which industry are you considering moving to? [Please select one response] (THOSE CONSIDERING A CHANGE)

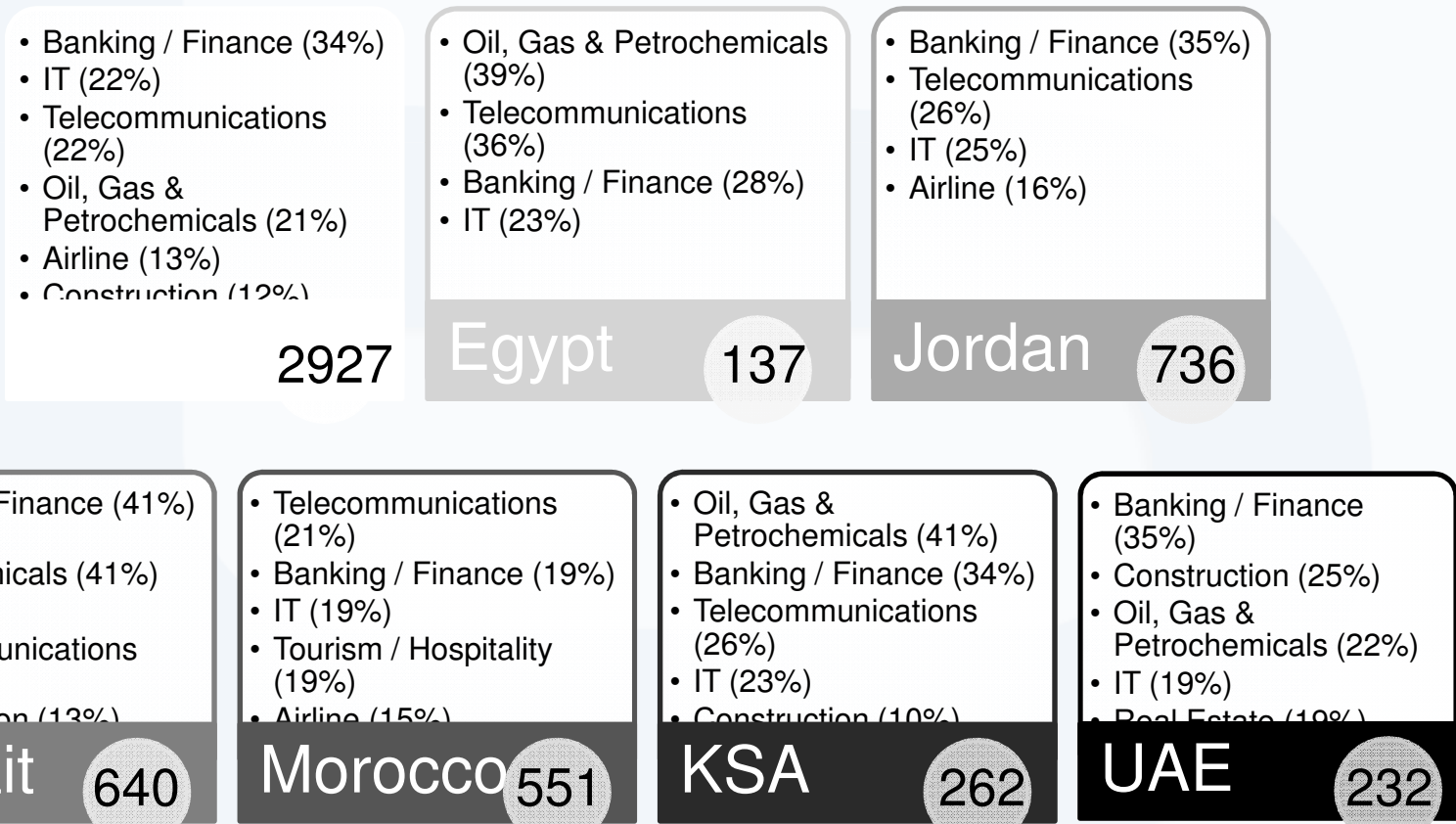


Top industries attracting / retaining talent

Q: Which industries would you say are attracting / retaining the top talent in your country of residence today?
[Please select up to 3 responses]

Note: Results for Egypt are to be interpreted with caution due to small base sizes
Figures on the right of total / country denote base sizes

- Banking / Finance & IT did well across all countries.
- Oil, Gas & Petrochemicals also did well in countries which have oil reserves.



Sectors with shortage of skilled labour

Q: Which industries would you say are suffering from a shortage of skilled labour in your country of residence?

[Please select up to 3 responses]

Note: Results for Egypt are to be interpreted with caution due to small base sizes
Figures on the right of total / country denote base sizes

- Healthcare / medical services and education / academia both vital sectors to humanity's well being seem to be suffering from a shortage of skilled labour.

- Healthcare / Medical services (14%)
- Education / Academia (13%)
- Aerospace (12%)
- Agriculture / Forestry (12%)

2927

- Government / Civil service (22%)
- Aerospace (18%)
- Agriculture / Forestry (17%)
- Manufacturing (16%)
- Education / Academia (15%)

Egypt

137

- Aerospace (17%)
- Agriculture / Forestry (15%)
- Manufacturing (12%)

Jordan 736

- Healthcare / Medical services (16%)
- Education / Academia (14%)
- Construction (13%)

Kuwait

640

- Education / Academia (19%)
- Healthcare / Medical services (17%)
- Aerospace (17%)
- Agriculture / Forestry (15%)

Morocco 551

- Construction (16%)
- IT (16%)
- Healthcare / Medical services (13%)
- Manufacturing (13%)

KSA

262

- Construction (28%)
- Healthcare / Medical services (14%)
- Education / Academia (12%)
- IT (10%)

UAE

232

Sectors sourcing talent internationally

Q: Which industries in your country of residence today are sourcing talent primarily overseas? [Please select up to 3 responses]

Note: Results for Egypt are to be interpreted with caution due to small base sizes
Figures on the right of total / country denote base sizes

- IT is a key sector which sources international talent across all the countries below.

- IT (23%)
- Banking / Finance (14%)
- Construction (13%)
- Airline, Education / Academia, Healthcare / Medical services, Oil, Gas & Petrochemicals (12% each)

2927

- IT (20%)
- Education / Academia (20%)
- Oil, Gas & Petrochemicals (19%)
- Telecommunications (19%)
- Banking / Finance (15%)

Egypt

137

- IT (30%)
- Education / Academia (23%)
- Banking / Finance (20%)
- Healthcare / Medical services (18%)

Jordan 736

- Oil, Gas & Petrochemicals (20%)
- IT (16%)
- Banking / Finance (13%)
- Healthcare / Medical services (12%)
- Construction (12%)

Kuwait

640

- IT (29%)
- Electronics (20%)
- Airline (17%)
- Aerospace (17%)
- Tourism / Hospitality (11%)

Morocco 551

- Oil, Gas & Petrochemicals (21%)
- Construction (16%)
- IT (14%)
- Banking / Finance (12%)

KSA 262

- Construction (25%)
- Banking / Finance (22%)
- IT (15%)
- Airline (15%)

UAE 232

Industries lacking domestic talent pool

Q: In which industries is the domestic talent pool in your country of residence most lacking? [Please select up to 3 responses]

Note: Results for Egypt are to be interpreted with caution due to small base sizes
Figures on the right of total / country denote base sizes

- In the UAE, construction emerged as the main sector lacking domestic talent. This is especially critical in line with the rapid real estate developments taking place across the UAE.

- Aerospace (11%)
- IT (11%)
- Construction (10%)
- Education / Academia (10%)
- Healthcare / Medical services (10%)

2927

- Government / Civil service (15%)
- Aerospace (14%)
- Education / Academia (12%)
- Healthcare / Medical services (12%)

Egypt

137

- Aerospace (14%)
- Agriculture / Forestry (12%)
- Manufacturing (9%)
- Construction (9%)

Jordan

736

- IT (15%)
- Healthcare / Medical services (14%)
- Education / Academia (12%)
- Construction (11%)
- Banking / Finance (11%)

Kuwait

640

- Aerospace (17%)
- Healthcare / Medical services (12%)
- Agriculture / Forestry (11%)
- Electronics (11%)

Morocco

551

- IT (19%)
- Construction (15%)
- Healthcare / Medical services (13%)
- Manufacturing (11%)
- Banking / Finance (10%)

KSA

262

- Construction (16%)
- Banking / Finance (13%)
- IT (10%)
- Education / Academia (9%)

UAE

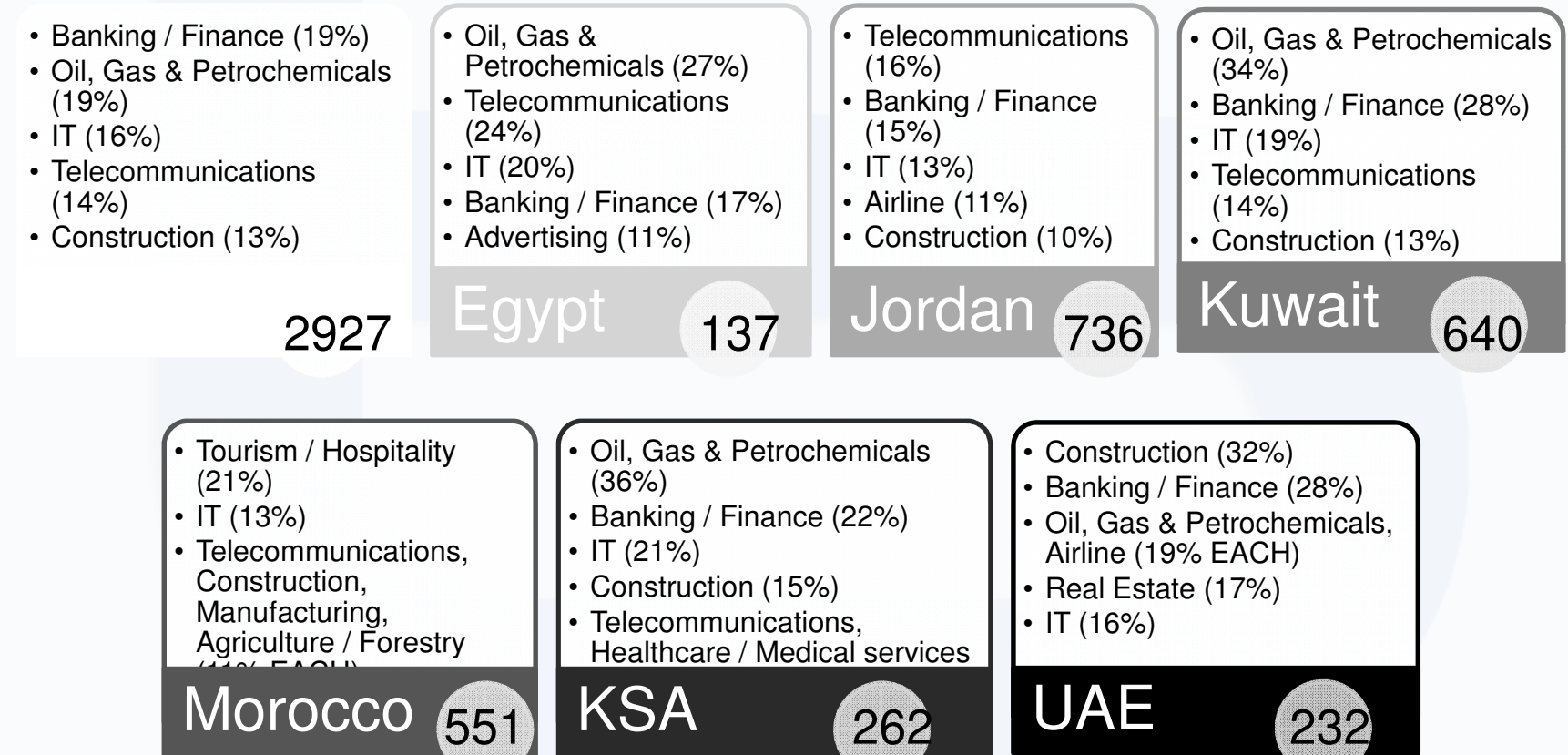
232

Industries successfully attracting global talent

Q: In which industries is the domestic talent pool in your country of residence most lacking? [Please select up to 3 responses]

Note: Results for Egypt are to be interpreted with caution due to small base sizes
Figures on the right of total / country denote base sizes

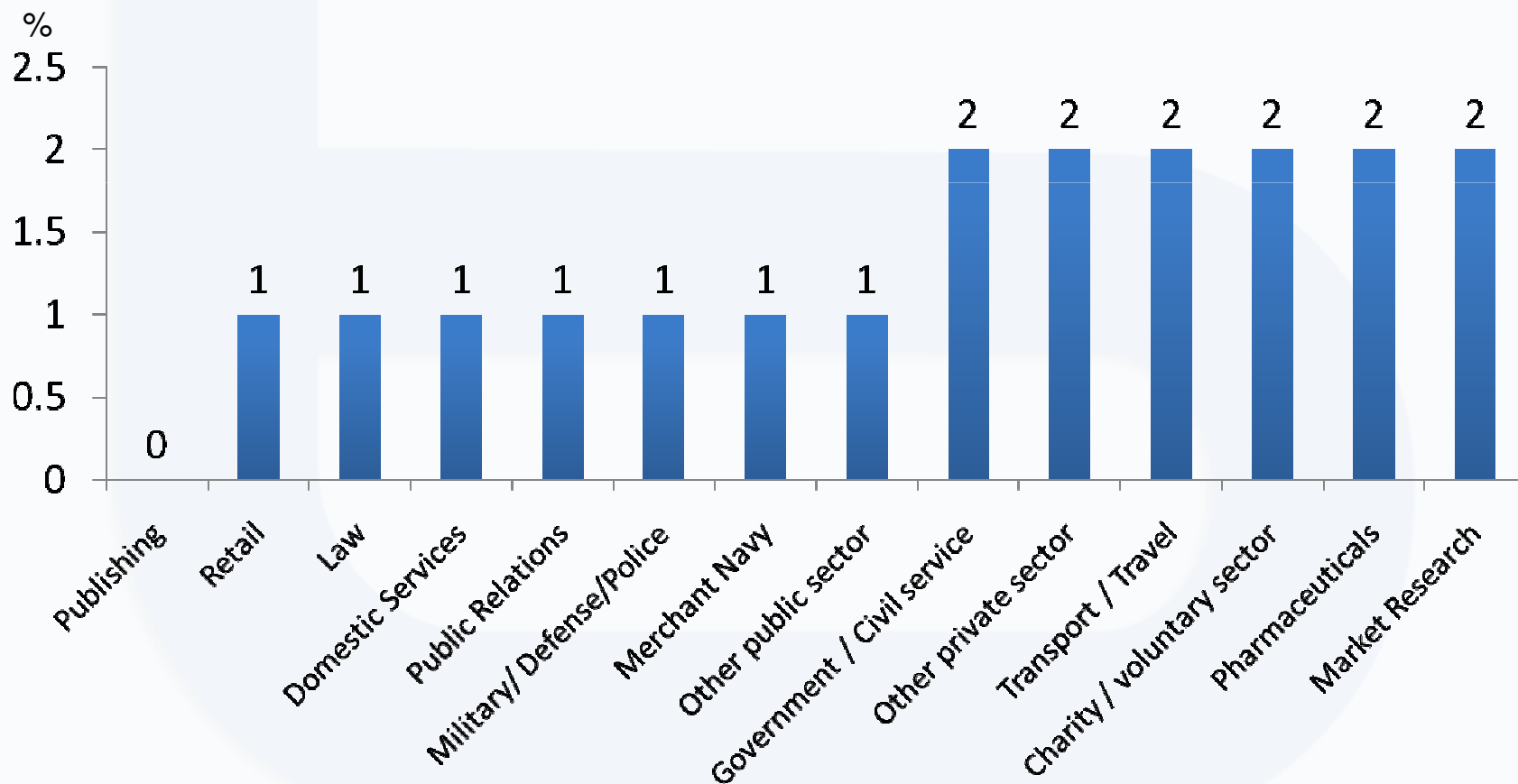
- Banking / Finance and Oil, Gas & Petrochem again emerged on top in terms of being able to attract global talent.



Industries unsuccessful in attracting global talent

Q: In which industries is the domestic talent pool in your country of residence most lacking? [Please select up to 3 responses]

Note: Sectors featuring here could be due to the lack of knowledge on the part of respondents or their relatively lower capability to attract talent as compared to the top 3.



Most sought positions by jobseekers

Q: Which 3 positions are currently most sought after by jobseekers in your country of residence? [Please select up to 3 responses]

Note: Results for Egypt are to be interpreted with caution due to small base sizes
Figures on the right of total / country denote base sizes

- IT / Telecommunications professionals, Banking / Finance professionals and Sales / Marketing Professionals featured in the top positions sought across all countries.

- IT/Telecommunications (38%)
- Banking/Finance (29%)
- Engineer/Automotive/Construction/Oil & Gas (27%)
- Sales/Marketing (19%)
- Architect/Interior (15%)

2927

- IT/Telecommunications (48%)
- Sales/Marketing (32%)
- Engineer/Automotive/Construction/Oil & Gas (29%)
- Banking/Finance (24%)
- HR / Training (17%)

Egypt 137

- IT/Telecommunications (37%)
- Banking/Finance (29%)
- Architect/Interior designer (20%)
- Sales/Marketing (18%)

Jordan 736

- Engineer/Automotive/Construction/Oil & Gas (34%)
- IT/Telecommunications (33%)
- Banking/Finance (33%)
- Sales/Marketing (20%)

Kuwait 640

- IT/Telecommunications (40%)
- Engineer/Automotive/Construction/Oil & Gas (23%)
- Architect/Interior designer (20%)
- Banking/Finance (18%)

Morocco 551

- IT/Telecommunications (38%)
- Engineer/Automotive/Construction/Oil & Gas (34%)
- Banking/Finance (28%)
- Sales/Marketing, Healthcare/Medical (21% EACH)

KSA 262

- Engineer/Automotive/Construction/Oil & Gas (39%)
- Banking/Finance (39%)
- IT/Telecommunications (31%)
- Sales/Marketing, Real estate/Property (21% EACH)

UAE 232

Most sought positions by employers

Q: Which 3 positions do you think are currently most sought after by employers in your country of residence?
[Please select up to 3 responses]

Note: Opinions expressed here are general population perceptions and do not necessarily represent official employer opinion.
Results for Egypt are to be interpreted with caution due to small base sizes
Figures on the right of total / country denote base sizes

- IT / Telecommunications and Sales / Marketing Professionals featured in the top positions sought by employers across all countries.

- IT/Telecommunications (31%)
- Banking/Finance (25%)
- Engineer/Automotive/Construction/Oil & Gas (24%)
- Sales/Marketing (20%)
- HR / Training (15%)

2927

- IT/Telecommunications (36%)
- Sales/Marketing (30%)
- Engineer/Automotive/Construction/Oil & Gas (27%)
- Banking/Finance (22%)
- HR / Training (20%)

Egypt 137

- IT/Telecommunications (30%)
- Banking/Finance (24%)
- Sales/Marketing (22%)
- Architect/Interior designer (18%)

Jordan 736

- IT/Telecommunications Engineer/Automotive/Construction/Oil & Gas (29% EACH)
- Banking/Finance (28%)
- Sales/Marketing (17%)
- Healthcare/Medical (15%)

Kuwait 640

- IT/Telecommunications (34%)
- Engineer/Automotive/Construction/Oil & Gas (21%)
- Sales/Marketing (20%)
- HR / Training (19%)
- Architect/Interior designer (18%)

Morocco 551

- IT/Telecommunications (36%)
- Engineer/Automotive/Construction/Oil & Gas (34%)
- Banking/Finance (24%)
- Sales/Marketing (20%)
- Healthcare/Medical (17%)

KSA 262

- Engineer/Automotive/Construction/Oil & Gas, Banking/Finance (34% EACH)
- IT/Telecommunications (22%)
- Sales/Marketing, Real Estate (18% EACH)

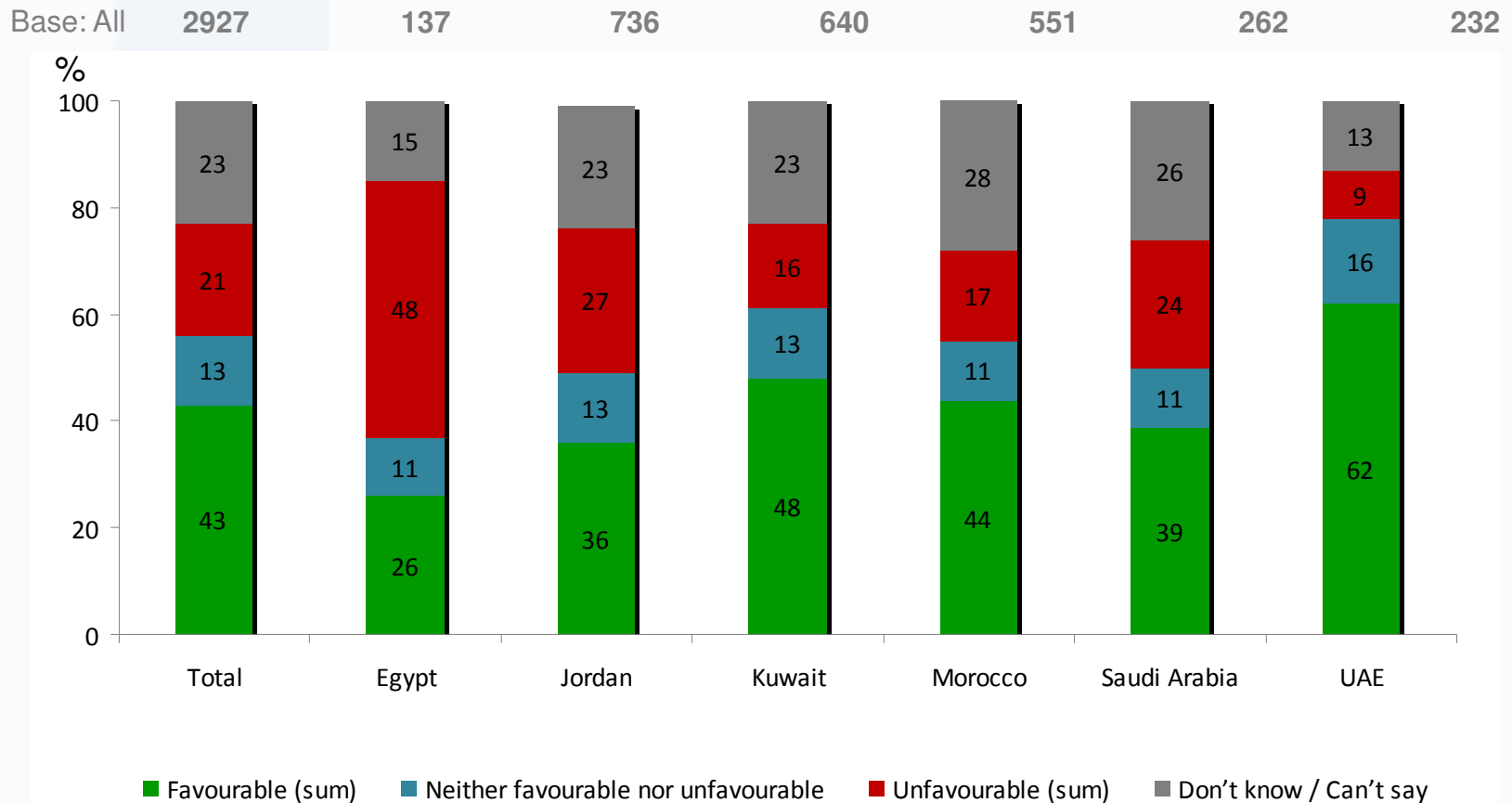
UAE

Government as an employer

Q: How favourable is the government as an employer of choice in your country of residence?

Note: Results for Egypt are to be interpreted with caution due to small base sizes

- Whilst most countries are more in favour of government employment, Egypt are directionally more negative rather than positive.



Total

	Most Preferred Industries	Jobseekers	Employers
IT/Telecommunications	20	38	31
Banking/Finance	26	29	25
Engineer/Automotive/Construction/Oil & Gas		27	24
Sales/Marketing		19	20
HR / Training		13	15
Architect/Interior designer		15	13
Healthcare/Medical		13	13
Oil, Gas & Petrochemicals	19		
Telecommunications	18		
Construction	16		
Real Estate	13		

Egypt

	Most Preferred Industries	Jobseekers	Employers
IT/Telecommunications	20	48	36
Banking/Finance	26	24	22
Engineer/Automotive/Construction/Oil & Gas		29	27
Sales/Marketing		32	30
HR / Training		17	20
Oil, Gas & Petrochemicals	31		
Telecommunications	26		
Construction	17		
Real Estate	15		15
Consumer Goods / FMCG	15		
Creative /Movie / Drama		15	15
Management, Research or Business Consultant			15

Jordan

	Most Preferred Industries	Jobseekers	Employers
IT/Telecommunications	25	37	31
Banking/Finance	28	29	25
Engineer/Automotive/Construction/Oil & Gas		17	24
Sales/Marketing		18	20
HR / Training			15
Telecommunications	25		
Construction	15		
Real Estate	14		
Creative /Movie / Drama		16	
Management, Research or Business Consultant		20	13
Architect/Interior designer			13
Education / Academia	11		
Airline	10		

Kuwait

	Most Preferred Industries	Jobseekers	Employers
IT/Telecommunications	17	33	29
Banking/Finance	33	33	28
Engineer/Automotive/Construction/Oil & Gas		34	29
Sales/Marketing		20	17
HR / Training			14
Telecommunications	14		
Construction	17		
Real Estate	9		
Management, Research or Business Consultant			12
Architect/Interior designer		14	
Healthcare/Medical		16	15
Airline	9		
Oil, Gas & Petrochemicals	33		
Teacher/Educator		14	

Morocco

	Most Preferred Industries	Jobseekers	Employers
IT/Telecommunications	16	40	34
Banking/Finance	15	18	17
Engineer/Automotive/Construction/Oil & Gas		23	21
Sales/Marketing		17	20
HR / Training		15	19
Telecommunications	14		
Construction	14		
Real Estate	13		
Architect/Interior designer		20	18
Tourism / Hospitality	17		
Manufacturing	12		
Consumer Goods / FMCG	12		

Saudi Arabia

	Most Preferred Industries	Jobseekers	Employers
IT/Telecommunications	23	38	36
Banking/Finance	24	28	24
Engineer/Automotive/Construction/Oil & Gas		34	34
Sales/Marketing		21	20
HR / Training		11	
Telecommunications	22		
Construction	16		
Oil, Gas & Petrochemicals	36		
Healthcare / Medical services	11	21	17
Management, Research or Business Consultant		13	16

UAE

	Most Preferred Industries	Jobseekers	Employers
IT/Telecommunications	15	31	22
Banking/Finance	30	39	34
Engineer/Automotive/Construction/Oil & Gas		39	34
Sales/Marketing		21	21
HR / Training		14	14
Construction	26		
Oil, Gas & Petrochemicals	22		
Management, Research or Business Consultant			13
Real estate sales	25	21	21
Architect/Interior designer			13
Airline crew/staff	10	15	
Government / Civil service	10		

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