

The Bayt.com Ideal Workplace in the Middle East and North Africa Survey 2017

January 2018



Objectives

- To understand how the current environment is impacting the satisfaction levels of an employee/job seeker in the Middle East.
- Identification of the drivers that motivate an employee/job seeker to stay longer in an organization and what makes them refer their work place to others.
- To recognize how employees / job seekers perceive their immediate line manager in terms of organizational commitment, leadership skills, supportiveness etc.



Section 1

RESEARCH METHODOLOGY



Sample definition

Age and Gender:

Working men and women

Aged 18+ years

Nationalities:

GCC Arabs, North Africans, Levantines, Western and Asian expatriates

Country of Residence

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

Levant: Lebanon, Syria*, Jordan

North Africa: Egypt, Morocco, Algeria, Tunisia

*Small data sample thus not presented in the report

Data Collection

All data was collected online. Fieldwork was done between 6th to 22nd December 2017. The total number of respondents achieved was 4,418.



Section 2

RESEARCH FINDINGS



CURRENT JOB

Summary

- 62% of respondents are currently employed in middle or junior management roles. There is a relatively higher incidence of respondents employed in senior management roles in Lebanon and Egypt.
- Majority of respondents (66%) have been working with their current employer for up to 6 years.
- One in four respondents (24%) are satisfied with their current salaries; there is a higher dissatisfaction among respondents in North Africa compared to other regions.
- Personal medical insurance (38%) followed by transportation allowance (24%) and bonuses (23%) emerge as the top compensation benefits given by employers. Employees in the Gulf are more likely to have benefits included in compensation (84%) than compared to other regions.
- Training and development opportunities (36%) and opportunities for long-term career advancement (32%) are the key drivers of loyalty after salary.
- 69% of respondents are either in the process of leaving their job (7%) or actively looking for other jobs (62%).
- Of the respondents looking to transition, only 13% of respondents employed in the Gulf are considering moving out of the region, while 43% of respondents from Levant markets are looking for employment as expats in Gulf countries.

Current position/title

- 62% of respondents are currently employed in middle or junior management roles. There is a relatively higher incidence of respondents employed in senior management roles in Lebanon and Egypt.

	Total	UAE	Saudi Arabia	Qatar	Kuwait	Bahrain	Oman	Lebanon	Jordan	Egypt	Morocco	Algeria	Tunisia
Senior Management – CEO/ CFO/ President/ General Manager/ Director, etc.	11	4	8	3	7	3	7	16	11	16	3	9	14
Middle Management – Senior Manager/ Assistant Manager, etc.	23	21	24	27	25	18	33	25	23	23	17	16	9
Junior Manager/ Team leader/ Supervisor	29	36	33	37	35	37	26	31	27	24	22	20	27
Employed Professional – Doctor / Lawyer/ Architect, etc.	19	17	17	13	15	13	15	13	19	22	15	28	27
Executive with no managerial responsibilities	19	22	17	20	18	29	20	14	21	14	43	28	23

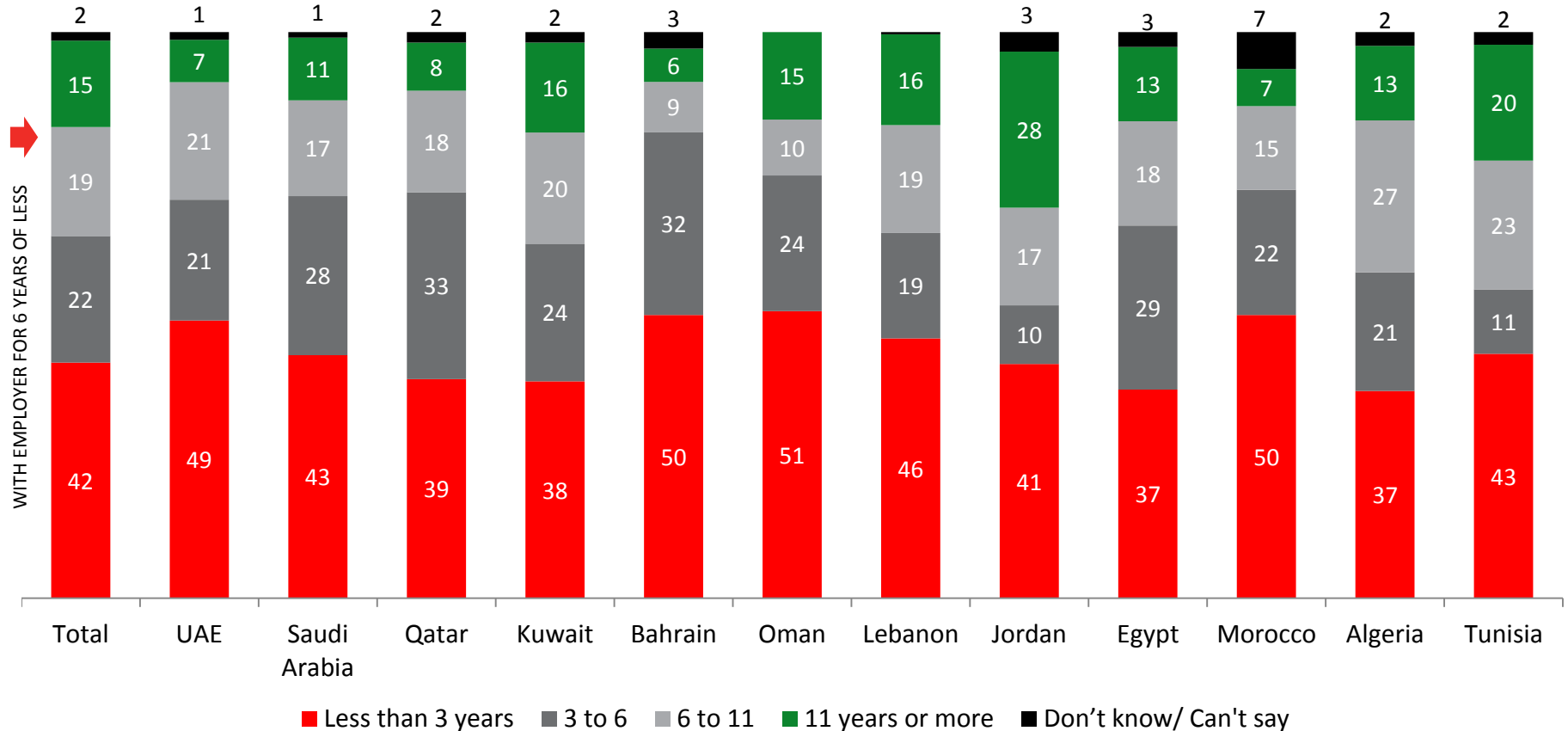
Base: Total (4,418), UAE (449), Saudi Arabia (1,066), Qatar (125), Kuwait (122), Bahrain (38), Oman (46), Lebanon (91), Jordan (322), Egypt (1,179), Morocco (213), Algeria (258), Tunisia (64)

Q. Which of the following do you intend to do in the next 12 months?

All figures are %'s

Number of years working with current employer

- Majority of respondents (66%) have been working with their current employer for up to 6 years.



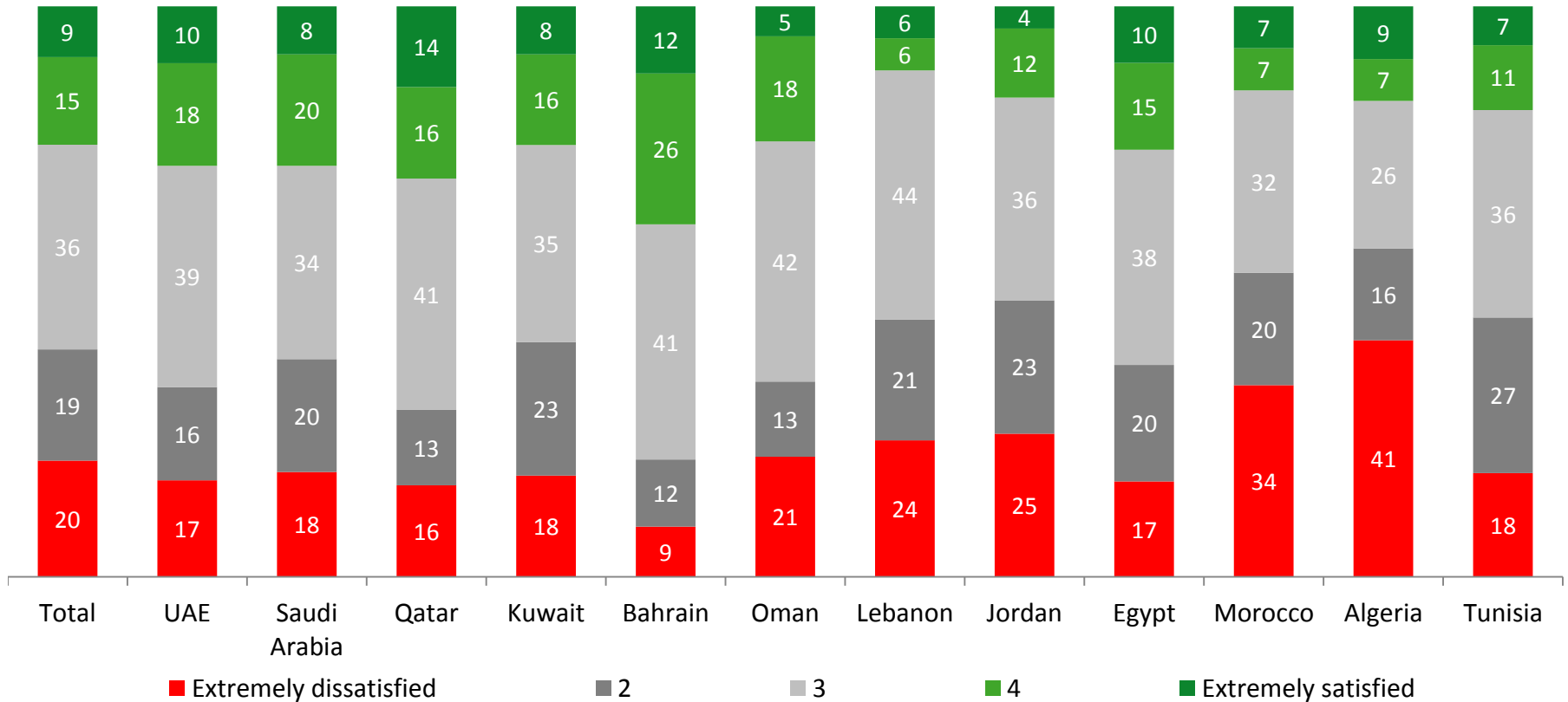
Base: Total (3,456), UAE (361), Saudi Arabia (794), Qatar (106), Kuwait (107), Bahrain (34), Oman (38), Lebanon (71), Jordan (231), Egypt (986), Morocco (122), Algeria (205), Tunisia (44)

Q. Which of the following best describes your current / last job position or title?

All figures are %'s

Satisfaction with current salary

- One in four respondents (24%) are satisfied with their current salaries.
- There is a higher dissatisfaction among respondents in North Africa compared to other regions.



Base: Total (3,456), UAE (361), Saudi Arabia (794), Qatar (106), Kuwait (107), Bahrain (34), Oman (38), Lebanon (71), Jordan (231), Egypt (986), Morocco (122), Algeria (205), Tunisia (44)

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

All figures are %'s

Additional benefits

- Personal medical insurance (38%) followed by transportation allowance (24%) and bonuses (23%) emerge as the top benefits given by employers.
- Employees in the Gulf are more likely to have benefits included in compensation (84%) compared to other regions.

	Total	UAE	Saudi Arabia	Qatar	Kuwait	Bahrain	Oman	Lebanon	Jordan	Egypt	Morocco	Algeria	Tunisia
Personal medical insurance	38	50	50	26	32	29	30	31	34	35	35	35	39
Transportation allowance	24	29	33	32	16	42	20	26	17	22	14	9	20
Bonus	23	24	25	22	30	24	9	26	16	27	16	10	25
Family medical insurance	21	18	31	10	9	18	9	20	24	13	22	26	22
Housing allowance	19	27	41	39	19	21	13	5	4	8	7	2	6
Personal annual air ticket	17	36	31	33	25	29	22	13	4	5	3	3	6
Company-provided mobile	14	16	15	16	18	13	17	9	11	13	11	9	11
Company-provided accommodation	14	27	19	26	23	24	13	10	5	7	8	7	16
Company-provided car / transport	13	22	15	22	17	16	11	15	7	12	10	5	16
Telecom bills paid by company	12	13	13	13	15	16	13	12	6	15	4	7	19
Gratuity	9	22	9	21	4	11	22	4	8	5	9	3	8
Holiday allowances / foreign trips	9	14	13	10	16	13	2	9	3	6	3	3	5
Personal training / development courses allowance	9	12	9	9	7	5	2	13	7	9	4	3	11
Family annual air tickets	8	12	17	13	8	18	11	4	2	3	2	2	3
Other benefits	5	7	5	6	7	3	7	5	5	6	5	6	5
Children's education allowance	3	7	4	6	2	3	-	11	6	1	1	3	3
Fitness benefits (e.g. gym membership)	3	5	4	8	3	3	-	1	2	2	2	3	5
Childcare facility	1	2	1	2	1	-	-	2	1	1	1	3	2
Stock options	1	1	1	1	-	-	2	2	0	1	1	-	3
None / Don't know	25	11	18	14	21	13	28	37	30	28	36	35	28

Base: Total (4,418), UAE (449), Saudi Arabia (1,066), Qatar (125), Kuwait (122), Bahrain (38), Oman (46), Lebanon (91), Jordan (322), Egypt (1,179), Morocco (213), Algeria (258), Tunisia (64)

Q. Apart from your salary, which of the following are included in the compensation benefits you receive from your current company/ received from your last company? (Please select all that apply)

All figures are %'s

Loyalty towards employers

- Training and development opportunities (36%) and opportunities for long-term career advancement (32%) are the key drivers of loyalty after salary.

	Total	UAE	Saudi Arabia	Qatar	Kuwait	Bahrain	Oman	Lebanon	Jordan	Egypt	Morocco	Algeria	Tunisia
My line manager	19	17	21	14	24	16	17	12	22	22	11	8	11
Senior management	12	12	12	12	13	9	11	13	9	14	6	8	8
The company brand and reputation	18	21	16	25	15	20	14	19	15	19	16	15	19
Opportunities for long-term career advancement	32	37	30	37	40	44	29	37	35	34	21	27	35
My colleagues	17	17	16	16	12	16	17	13	15	19	16	16	19
Physical location of my workplace	13	9	13	12	8	2	13	11	15	16	15	18	9
Training and development opportunities	36	34	36	38	35	38	33	41	35	35	29	37	53
Opportunities to travel	13	9	10	7	6	7	8	21	10	16	16	20	21
The nature of my daily responsibilities	16	23	14	22	20	22	21	18	13	16	15	17	14
Fun office environment	21	16	21	14	18	22	24	22	23	19	27	25	26
Flexibility of work timings	17	20	17	17	22	24	17	19	15	15	20	12	16
Independence and control over my work	22	25	18	28	23	18	19	27	25	21	18	22	32
Job security	27	28	36	36	26	29	38	22	38	20	20	23	20
Other	3	4	3	4	1	7	-	7	2	3	4	3	6
None – I am primarily interested in the salary	7	5	7	4	9	7	11	3	6	7	14	11	4
Don't know – can't say	5	5	5	1	3	2	2	3	3	4	8	5	-

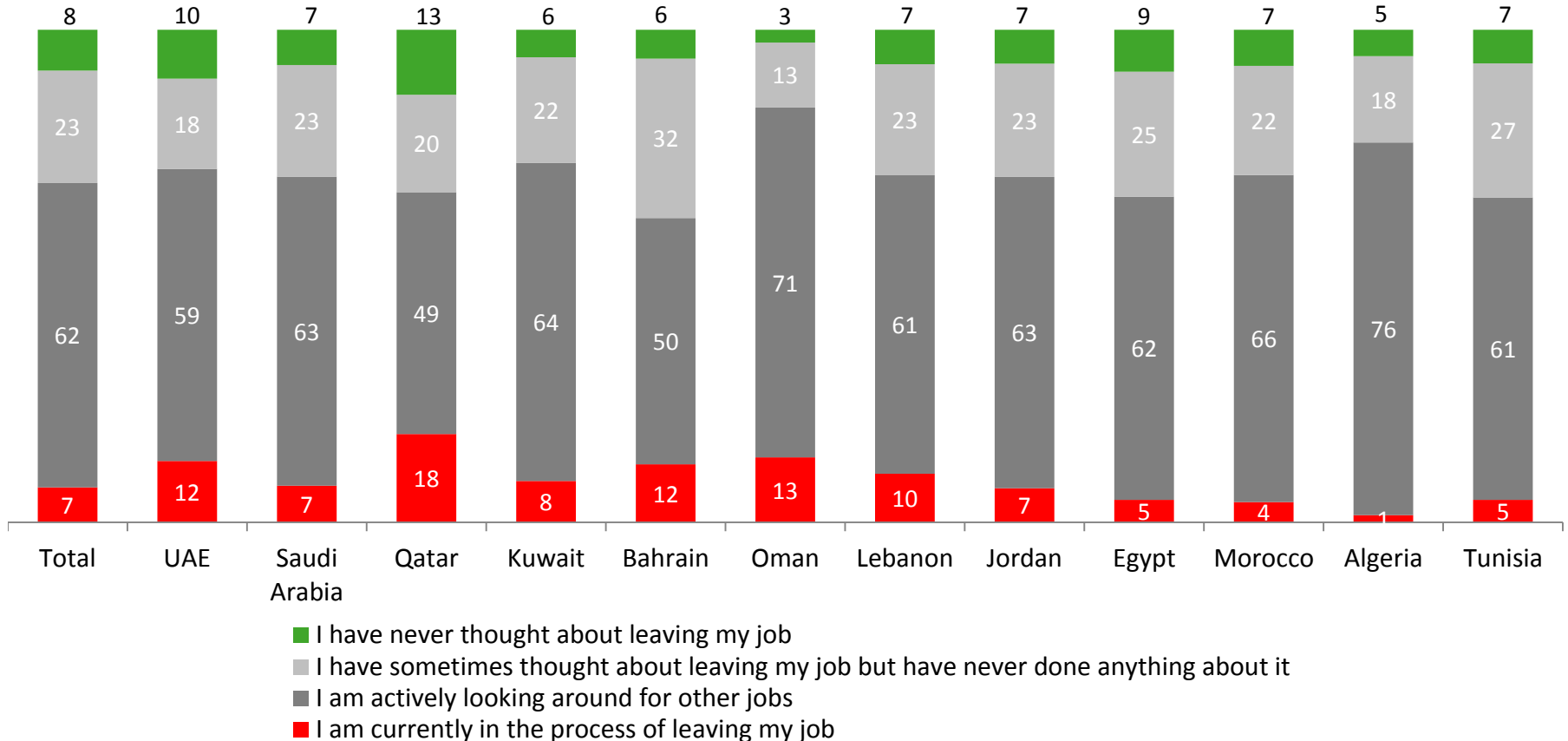
Base: Total (5,624), UAE (505), Saudi Arabia (1,363), Qatar (138), Kuwait (141), Bahrain (45), Oman (63), Lebanon (116), Jordan (422), Egypt (1,452), Morocco (361), Algeria (383), Tunisia (85)

Q. Which of the following variables most strongly drive your loyalty to the company besides salary? Please select your top 3 variables.

All figures are %'s

Outlook on current job

- 69% of respondents are either in the process of leaving their job (7%) or actively looking for other jobs (62%).



Base: Total (3,456), UAE (361), Saudi Arabia (794), Qatar (106), Kuwait (107), Bahrain (34), Oman (38), Lebanon (71), Jordan (231), Egypt (986), Morocco (122), Algeria (205), Tunisia (44)

Q. Which of these statements is most applicable to you and your current job?

All figures are %'s

Future plans

- Of the respondents looking to transition, majority employed in Algeria (53%) are looking for a better job as an expat in a different country in the Middle East. The overall proportion to move out of the region entirely is observed to be quite low (6%).

	Total	UAE	Saudi Arabia	Qatar	Kuwait	Bahrain	Oman	Lebanon	Jordan	Egypt	Morocco	Algeria	Tunisia
Look for a better job in the same industry	33	44	37	28	43	41	32	29	38	33	29	16	17
Look for a better job in a different industry	24	37	29	39	30	13	43	29	20	17	21	16	5
Look for a better job as an expat in a different country in the Middle East	30	8	20	16	13	25	19	18	28	39	35	53	61
Move to another region as an expat	6	2	4	5	3	3	3	15	10	5	7	14	15
Return to home country	1	1	4	4	4	6	-	-	-	0	-	-	-
Other	3	5	3	3	2	6	3	6	2	3	4	1	2
Nothing/ None of these	3	2	3	3	6	6	-	3	3	3	4	1	-

Base: Total (3,169), UAE (325), Saudi Arabia (737), Qatar (92), Kuwait (101), Bahrain (32), Oman (37), Lebanon (66), Jordan (215), Egypt (902), Morocco (113), Algeria (194), Tunisia (41)

Q. Which of the following do you intend to do in the next 12 months?

All figures are %'s



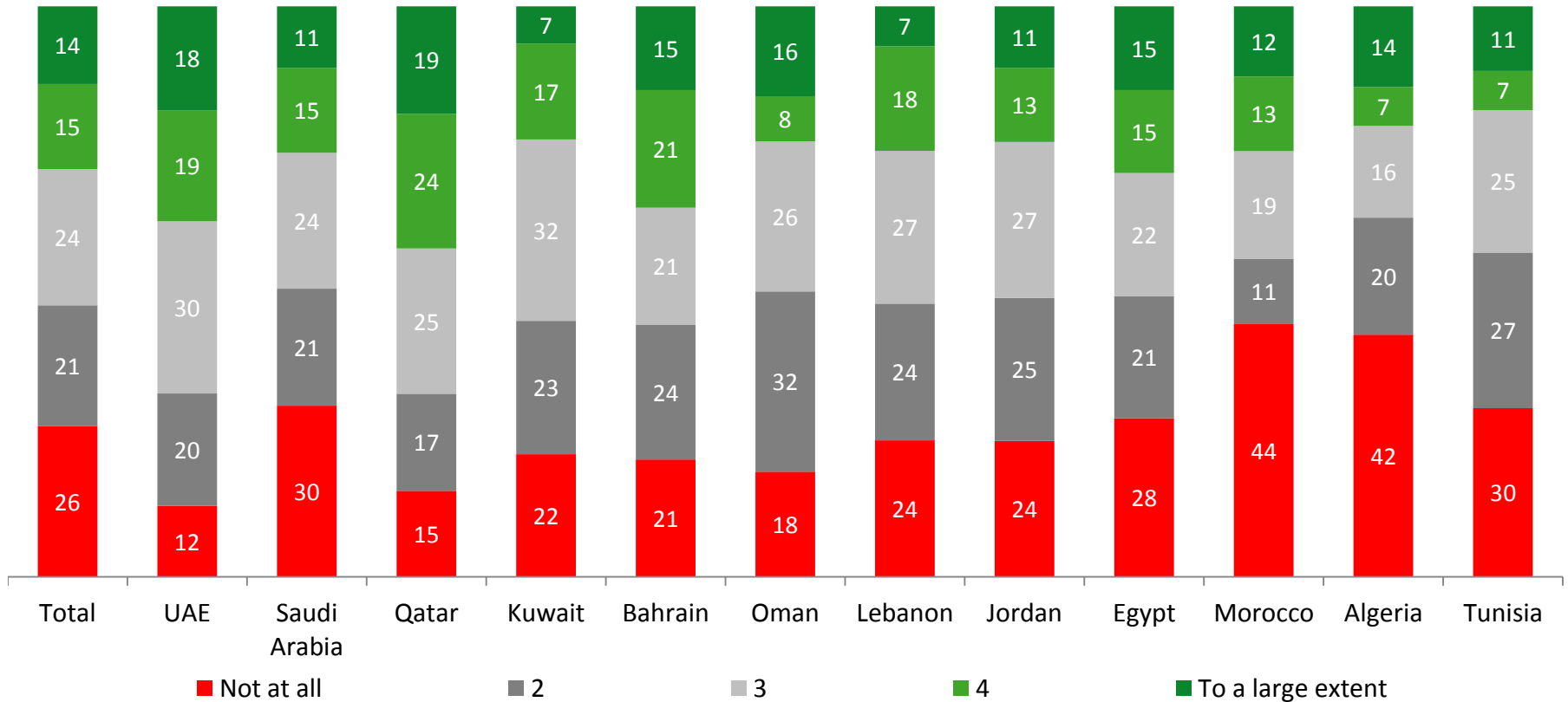
CURRENT WORKPLACE – ATTRIBUTES

Summary

- Overall 30% of respondents believe that their workplace encourages innovation and creativity. This perception is stronger among respondents employed in UAE (38%) and Qatar (42%).
- Only a quarter of respondents (24%) feel their workplace has an attractive design/layout; there is better perception among respondents in the Gulf than compared to other regions.
- More than half (58%) of respondents feel there is a lack of flexibility. In the Gulf, companies in UAE (31%) and Qatar (39%) are seen as offering most flexibility while KSA is seen as the least flexible (17%)
- About a quarter of respondents (27%) perceive that there is diversity in the workplace.
- Among respondents who are currently employed, 2 in 5 (38%) believe their company nurtures a trustworthy relationship with their employees.
- 34% of respondents believe their company communicates with their employees transparently.
- 27% of respondents believe their company promotes team-building and fun activities.
- 39% of respondents claim their employers promote the use of advanced technologies in their workplace.

Workplace attributes - Encourages innovation and creativity

- Overall 29% of respondents believe that their workplace encourages innovation and creativity.
- This perception is stronger among respondents employed in UAE (38%) and Qatar (42%).



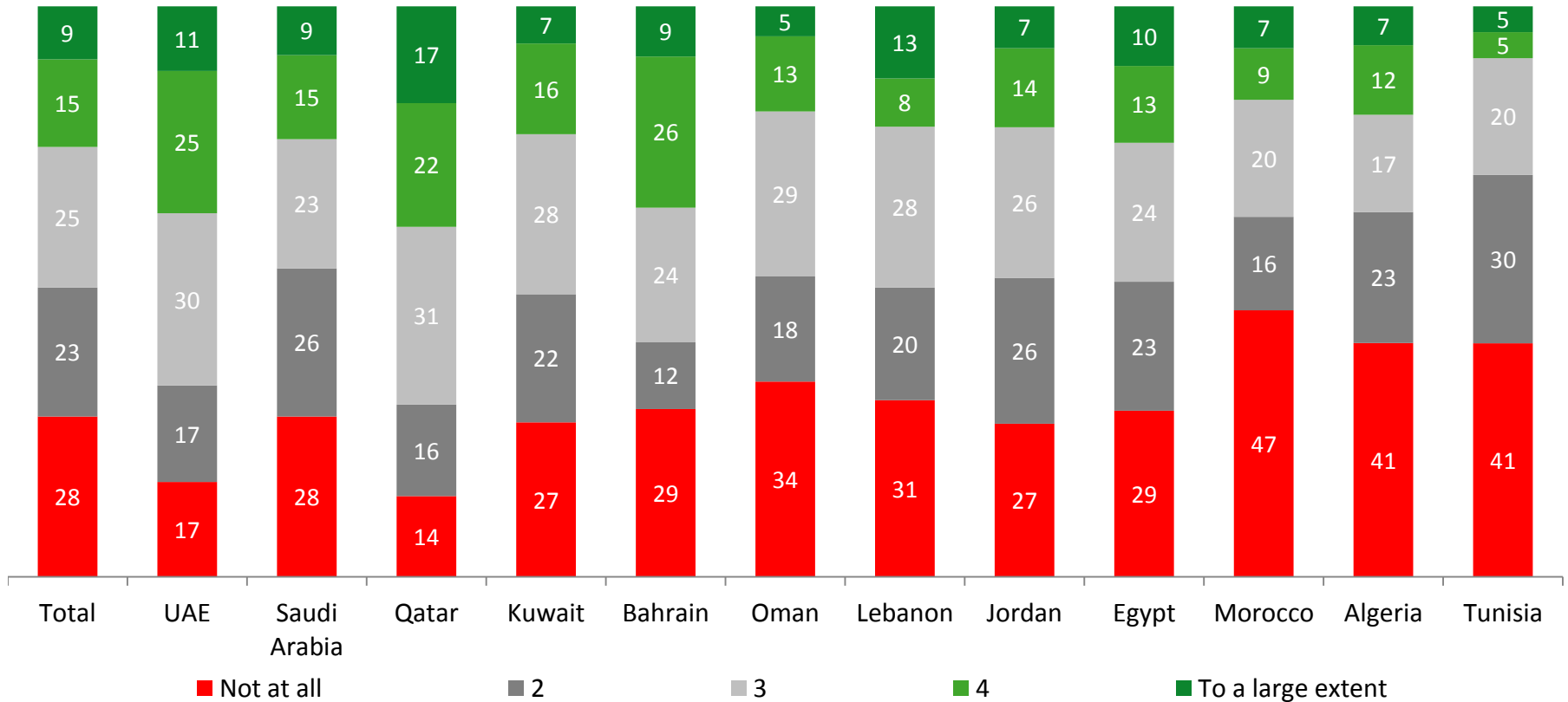
Base: Total (3,456), UAE (361), Saudi Arabia (794), Qatar (106), Kuwait (107), Bahrain (34), Oman (38), Lebanon (71), Jordan (231), Egypt (986), Morocco (122), Algeria (205), Tunisia (44)

Q. Please indicate to what extent you feel that the following attributes exist at your workplace. My workplace...

All figures are %'s

Workplace attributes - Has an attractive office design/ layout

- Only a quarter of respondents (24%) feel their workplace has an attractive design/layout; there is better perception among respondents in the Gulf than compared to other regions.



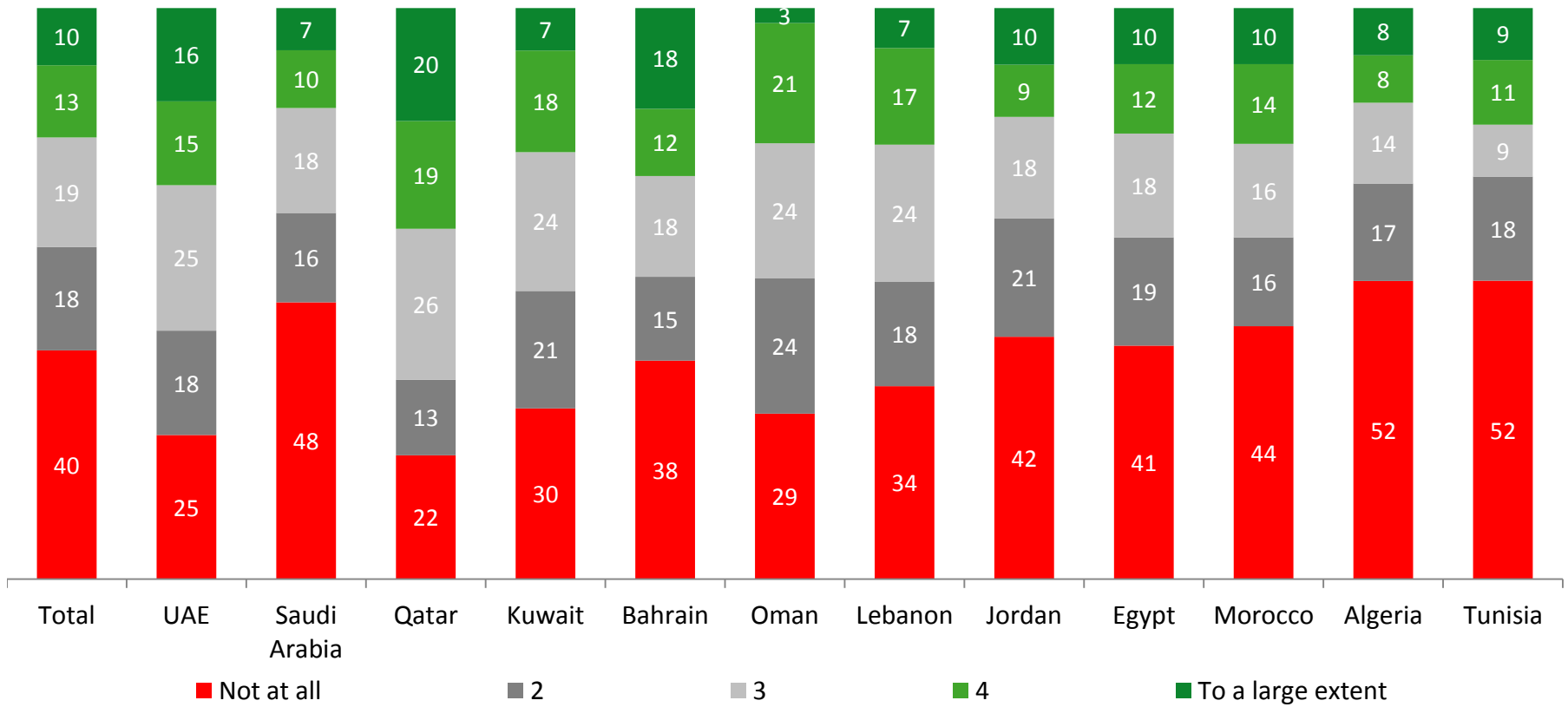
Base: Total (3,456), UAE (361), Saudi Arabia (794), Qatar (106), Kuwait (107), Bahrain (34), Oman (38), Lebanon (71), Jordan (231), Egypt (986), Morocco (122), Algeria (205), Tunisia (44)

Q. Please indicate to what extent you feel that the following attributes exist at your workplace. My workplace...

All figures are %'s

Workplace attributes - Promotes flexibility by giving employees the option to work remotely

- More than half (58%) of respondents feel there is a lack of flexibility.
- In the Gulf, companies in UAE (31%) and Qatar (39%) are seen as offering most flexibility while KSA is seen as the least flexible (17%).



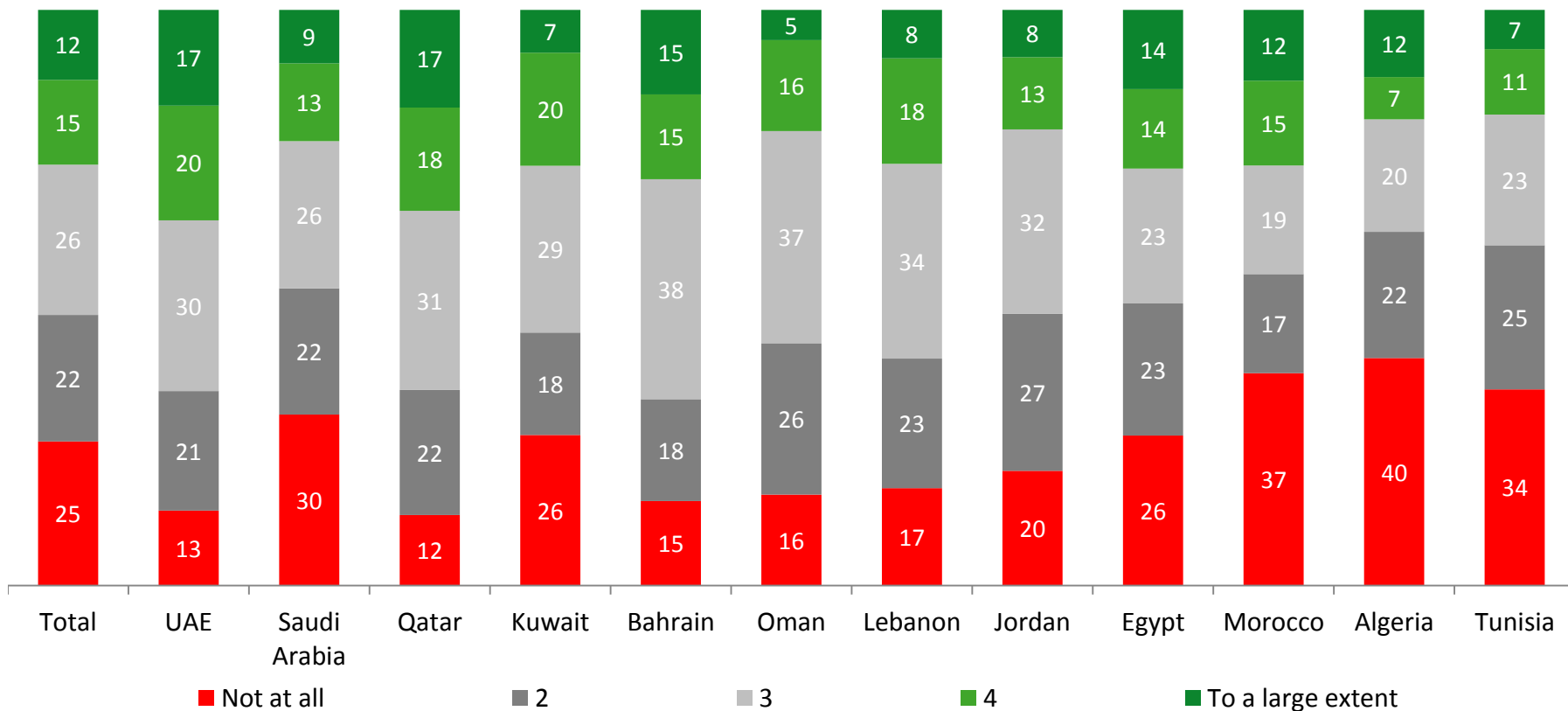
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Q. Please indicate to what extent you feel that the following attributes exist at your workplace. My workplace...

All figures are %'s

Workplace attributes - Encourages diversity

- About a quarter of respondents (27%) perceive that there is diversity in the workplace



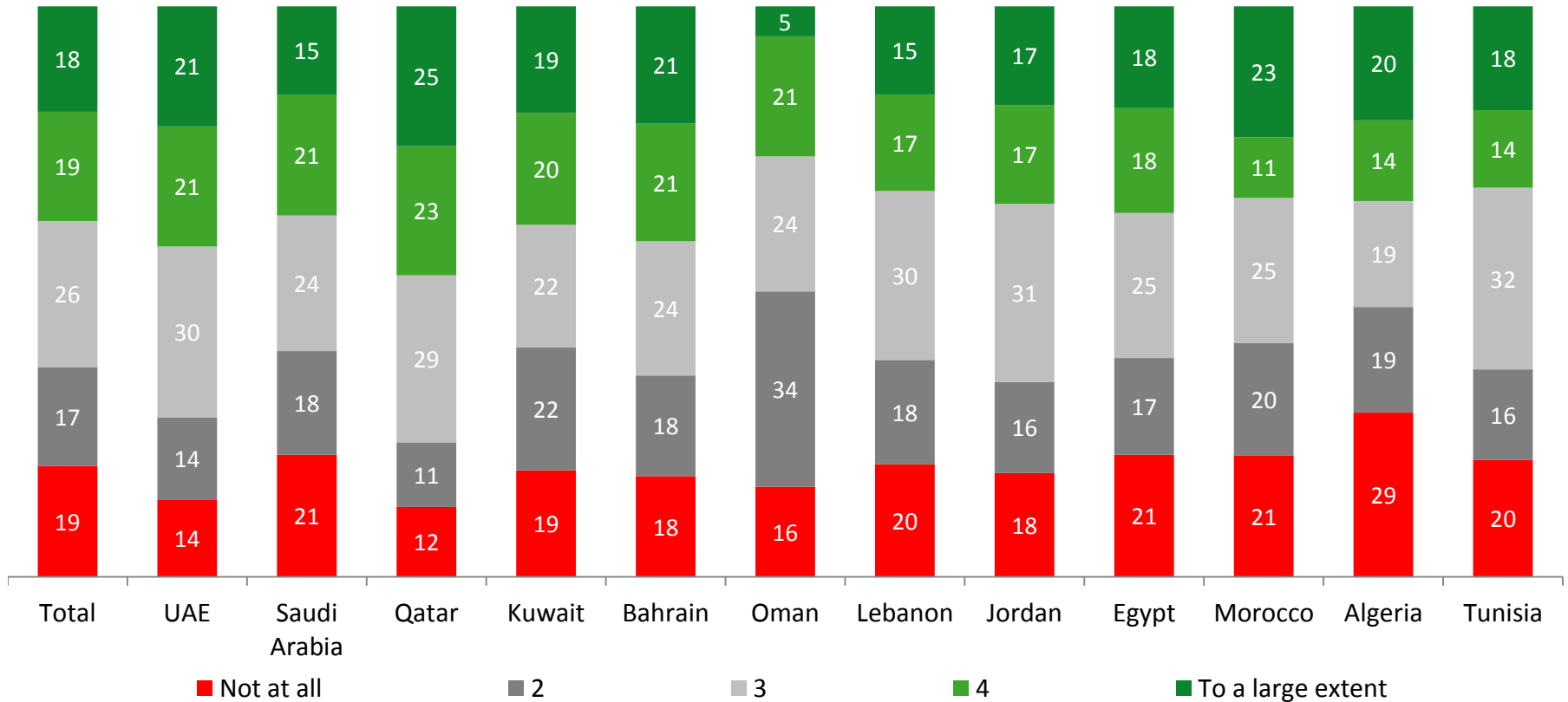
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Q. Please indicate to what extent you feel that the following attributes exist at your workplace. My workplace...

All figures are %'s

Workplace attributes - Nurtures a trustworthy relationship with its employees

- Among respondents who are currently employed, 2 in 5 (38%) believe their company nurtures a trustworthy relationship with their employees.



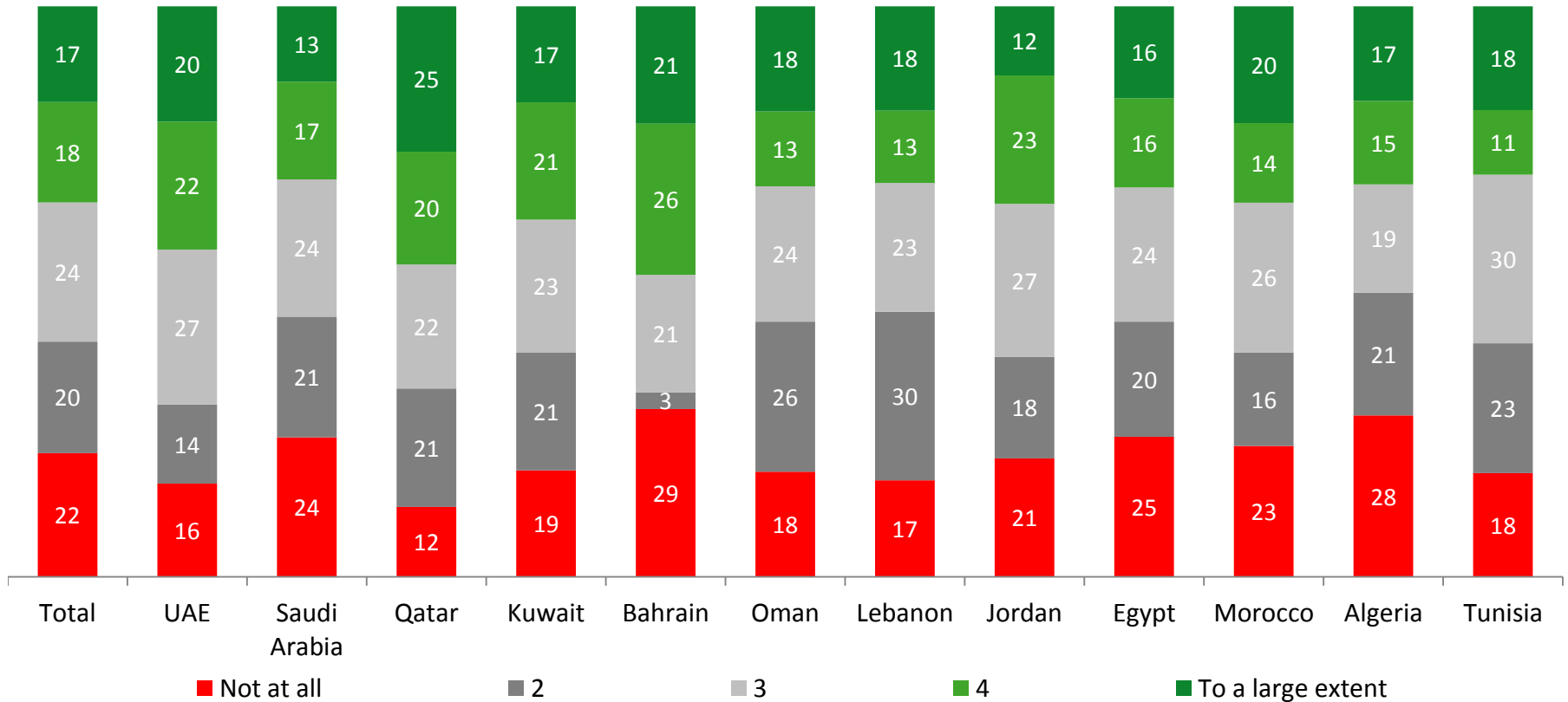
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Q. Please indicate to what extent you feel that the following attributes exist at your workplace. My workplace...

All figures are %'s

Workplace attributes - Communicates with employees transparently

- 34% of respondents believe their company communicates with their employees transparently.



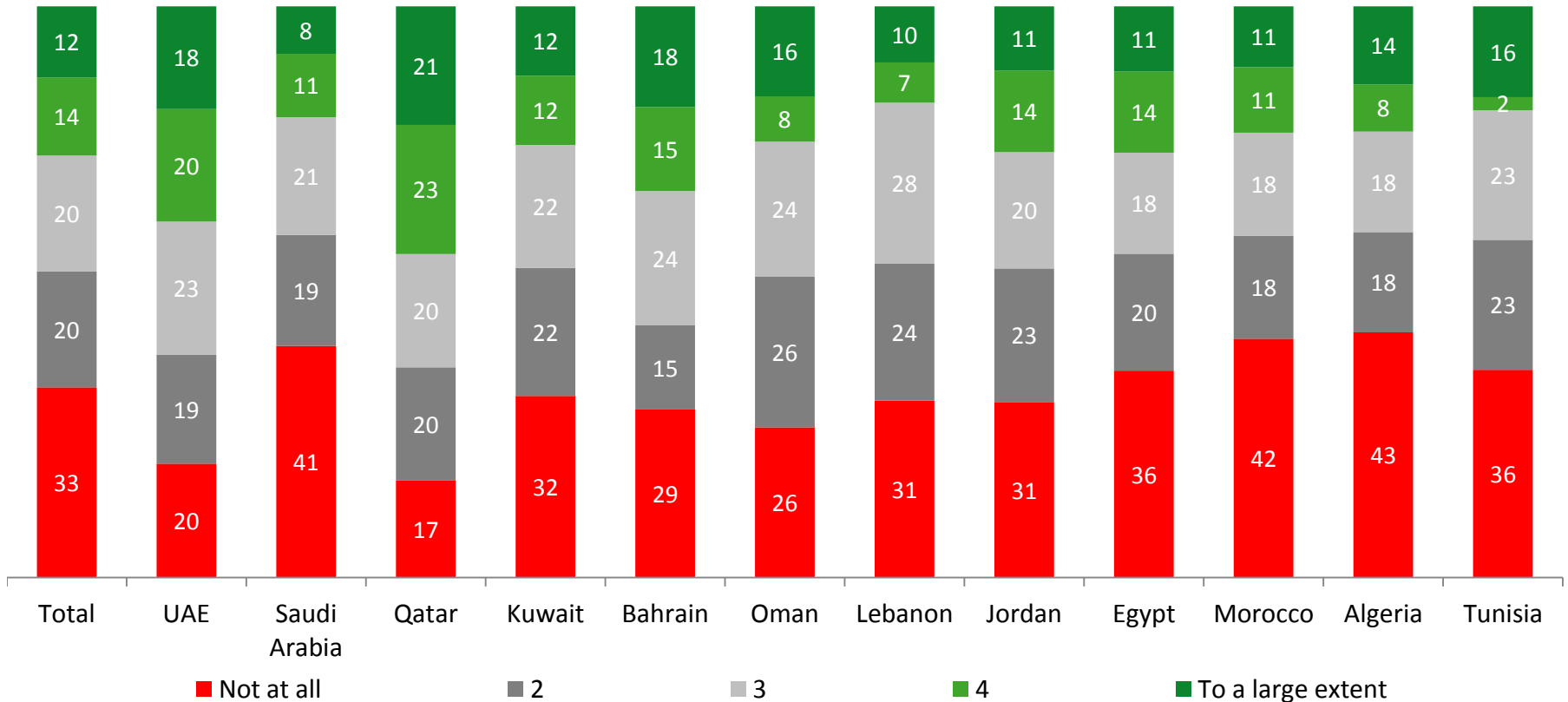
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Q. Please indicate to what extent you feel that the following attributes exist at your workplace. My workplace...

All figures are %'s

Workplace attributes - Promotes team-building and fun activities

- 27% of respondents believe their company promotes team-building and fun activities.



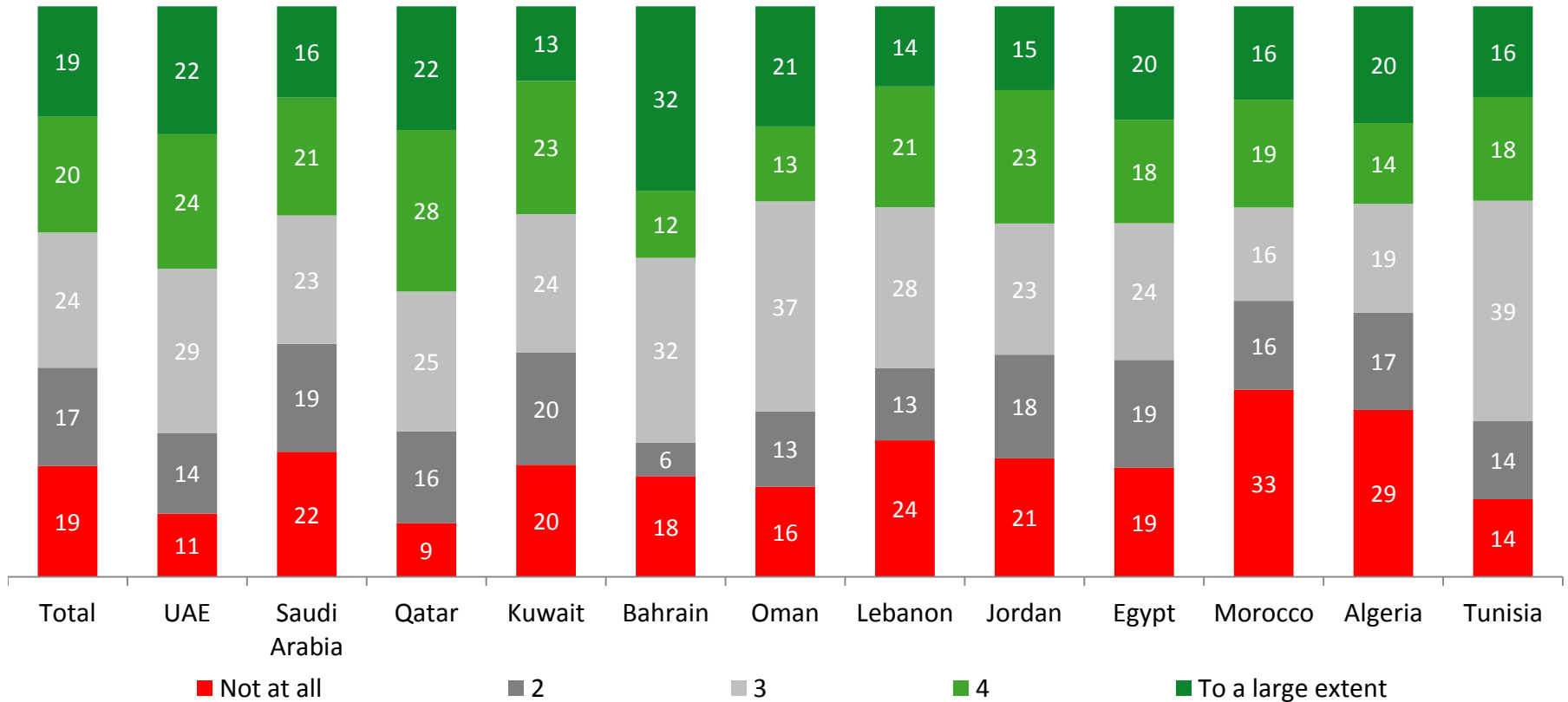
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Q. Please indicate to what extent you feel that the following attributes exist at your workplace. My workplace...

All figures are %'s

Workplace attributes - Promotes the use of advanced technology

- 39% of respondents claim their employers promote the use of advanced technologies in their workplace.



Base: Total (3,456), UAE (361), Saudi Arabia (794), Qatar (106), Kuwait (107), Bahrain (34), Oman (38), Lebanon (71), Jordan (231), Egypt (986), Morocco (122), Algeria (205), Tunisia (44)

Q. Please indicate to what extent you feel that the following attributes exist at your workplace. My workplace...

All figures are %'s



WORKPLACE ENVIRONMENT

Summary

- 37% of respondents claim the interior design of their office reflects their company's brand and values. This is significantly higher among respondents based in the Gulf (42%) than in the Levant (33%) and North Africa (36%)
- 31% of respondents feel that they were allowed to personalize their workspace. A significant number of respondents (62%) in Morocco claim they are not allowed to personalize their workspace.
- Closed rooms (27%) followed by open plan (22%) are the most preferred office layout plans. Preference for closed rooms is higher in Qatar (33%) and Kuwait (34%).



Interior design of office

- 37% of respondents claim the interior design of their office reflects their company's brand and values.
- This is significantly higher among respondents based in the Gulf (42%) than in the Levant (33%) and North Africa (36%)

	Total	UAE	Saudi Arabia	Qatar	Kuwait	Bahrain	Oman	Lebanon	Jordan	Egypt	Morocco	Algeria	Tunisia
Yes	37	56	36	52	39	45	35	42	34	36	23	25	20
No	37	24	40	30	43	24	33	30	41	40	31	40	34
Don't know	26	20	24	18	19	32	33	29	25	25	46	35	45

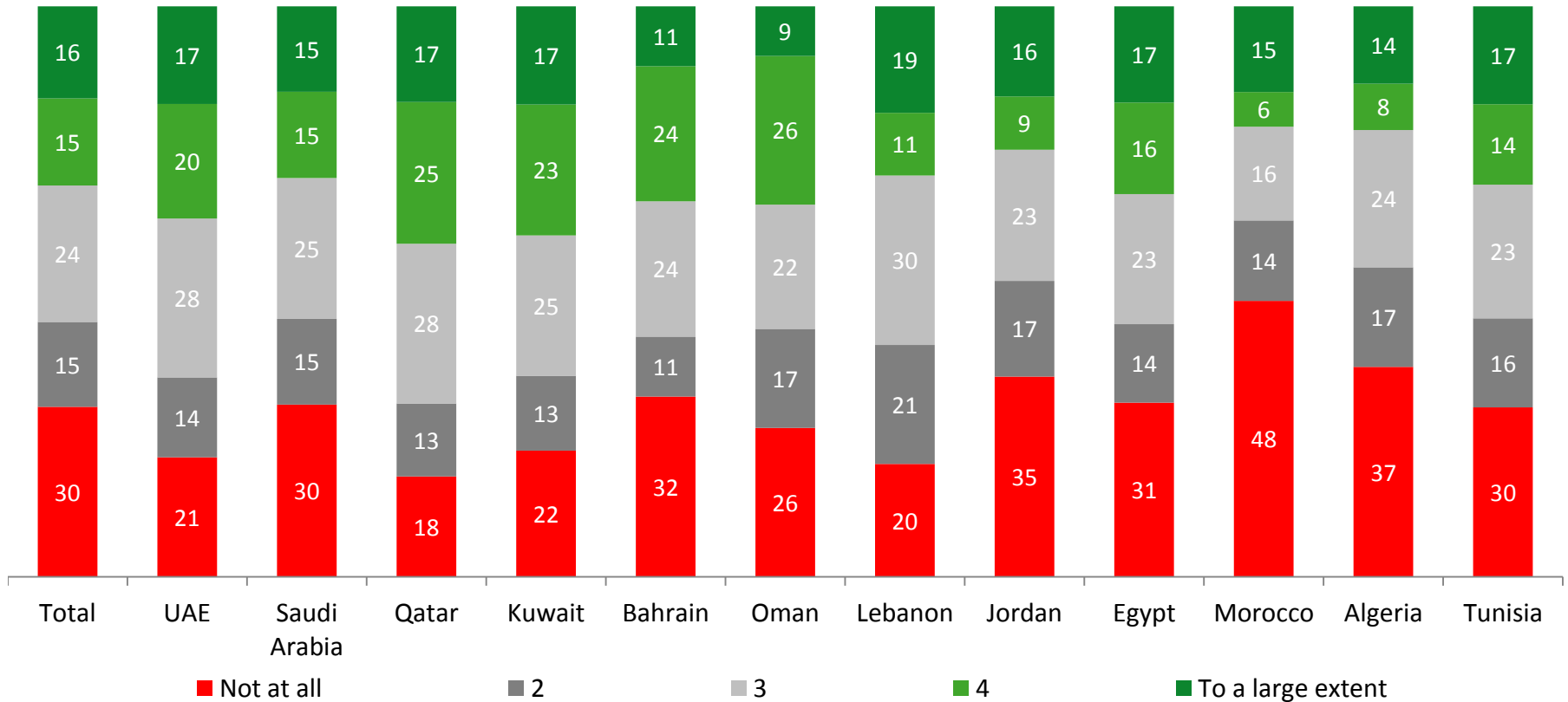
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Q. Does the interior design of your office reflect the company's brand and values?

All figures are %'s

Personalizing workspace

- 31% of respondents feel that they were allowed to personalize their workspace.
- A significant number of respondents (62%) in Morocco claim they are not allowed to personalize their workspace.



Base: Total (4,418), UAE (449), Saudi Arabia (1,066), Qatar (125), Kuwait (122), Bahrain (38), Oman (46), Lebanon (91), Jordan (322), Egypt (1,179), Morocco (213), Algeria (258), Tunisia (64)

Q. To what extent are / were you permitted to personalize your workspace?

All figures are %'s



Preferred office layout

- Closed rooms (27%) followed by open plan (22%) are the most preferred office layout plans. Preference for closed rooms is higher in Qatar (33%) and Kuwait (34%).

	Total	UAE	Saudi Arabia	Qatar	Kuwait	Bahrain	Oman	Lebanon	Jordan	Egypt	Morocco	Algeria	Tunisia
Closed rooms	27	22	31	33	34	20	17	31	25	31	17	18	20
Open plan	22	23	22	20	18	13	17	29	22	20	29	25	22
Cubicles	12	14	13	12	10	4	13	8	14	12	10	9	12
Workstations	12	17	8	15	13	18	24	3	14	11	13	14	15
Others	5	6	4	4	5	16	3	7	4	5	4	3	5
No preference	22	19	21	17	20	29	25	22	22	22	27	31	26

Base: Total (5,624), UAE (505), Saudi Arabia (1,363), Qatar (138), Kuwait (141), Bahrain (45), Oman (63), Lebanon (116), Jordan (422), Egypt (1,452), Morocco (361), Algeria (383), Tunisia (85)

Q. Which is your preferred type of office layout?

All figures are %'s



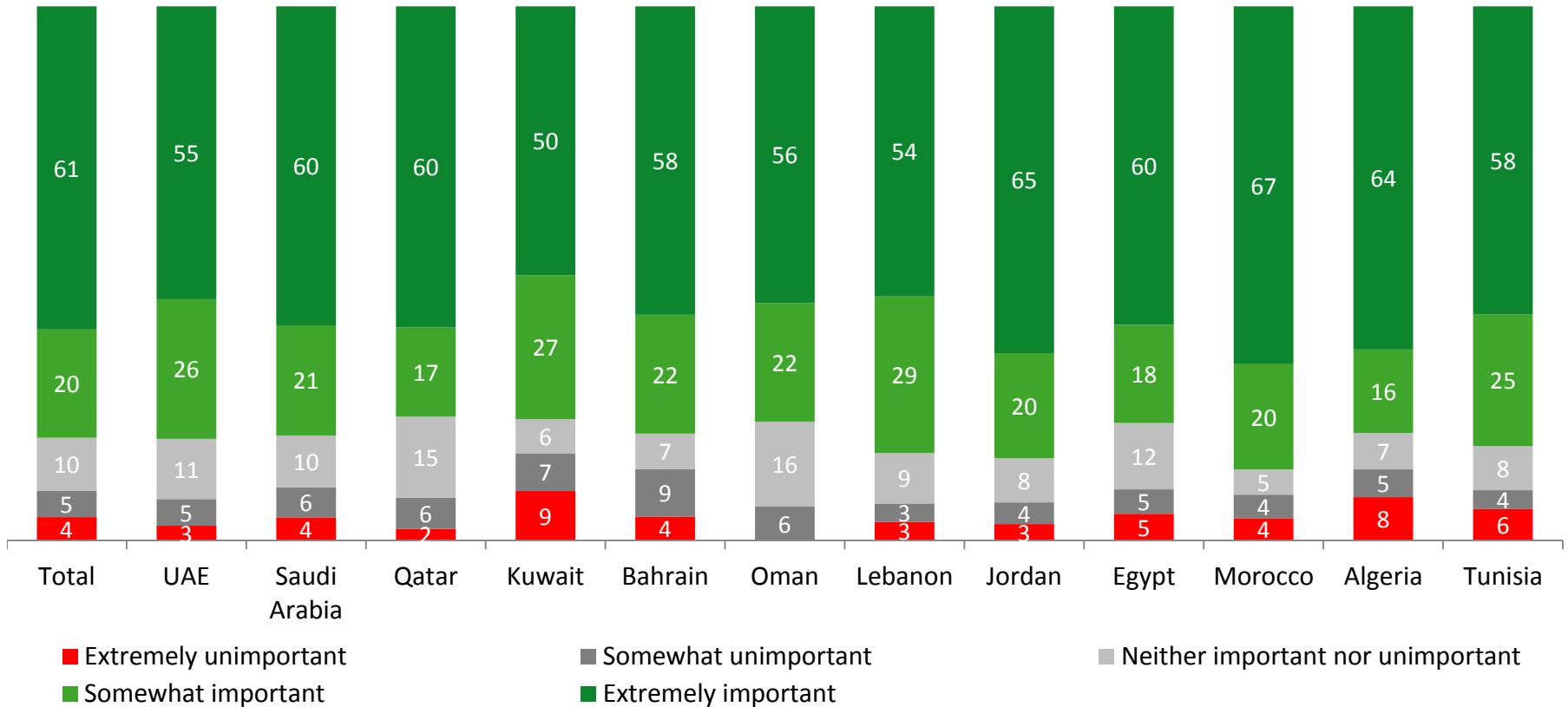
IMPORTANT FACTORS IN WORKPLACE

Summary

- 81% of respondents feel that innovation and creativity are important factors in the workplace.
- 71% of respondents feel the design and layout of the office is an important factor in the workplace. This attribute is seen as being of lower importance in Kuwait (62%) and Tunisia (60%).
- 57% of respondents claim remote work options are an important aspect in their workplace.
- Overall, 70% of respondents feel having diversity is an important factor in the workplace. This perception is lower in Bahrain (56%) compared to other countries.
- While, overall, 80% of respondents feel transparent communication is important in a workplace, this belief is significantly higher in Morocco (88%).
- 74% of respondents claim having team-building and fun activities is important in a workplace.
- 83% of respondents claim the use of advanced technology is important in a workplace.
- Overall, 81% of respondents feel having fair evaluation is important in a workplace; this perception is lower in Bahrain (67%) compared to other countries.
- Overall, 79% of respondents feel that having challenging work is an important factor; this belief is marginally higher in UAE (84%) and Tunisia (86%)
- Only 9% of respondents claim that having a work-life balance is not an important aspect.

Important factors in workplace - Innovation and creativity

- 81% of respondents feel that innovation and creativity are important factors in the workplace.



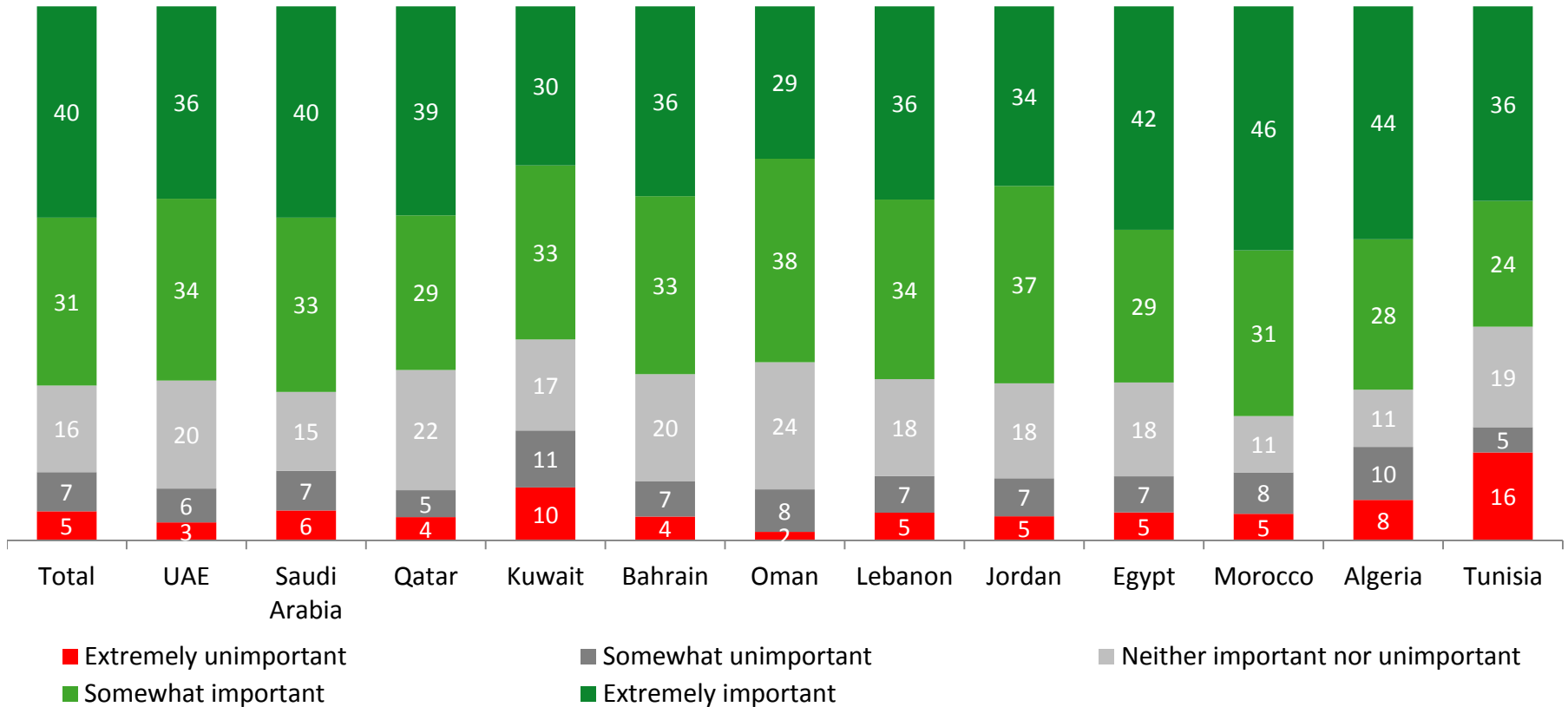
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Q. How important are the following attributes in your workplace?

All figures are %'s

Important factors in workplace - Design/ layout

- 71% of respondents feel the design and layout of the office is an important factor in the workplace. This attribute is seen as being of lower importance in Kuwait (62%) and Tunisia (60%).



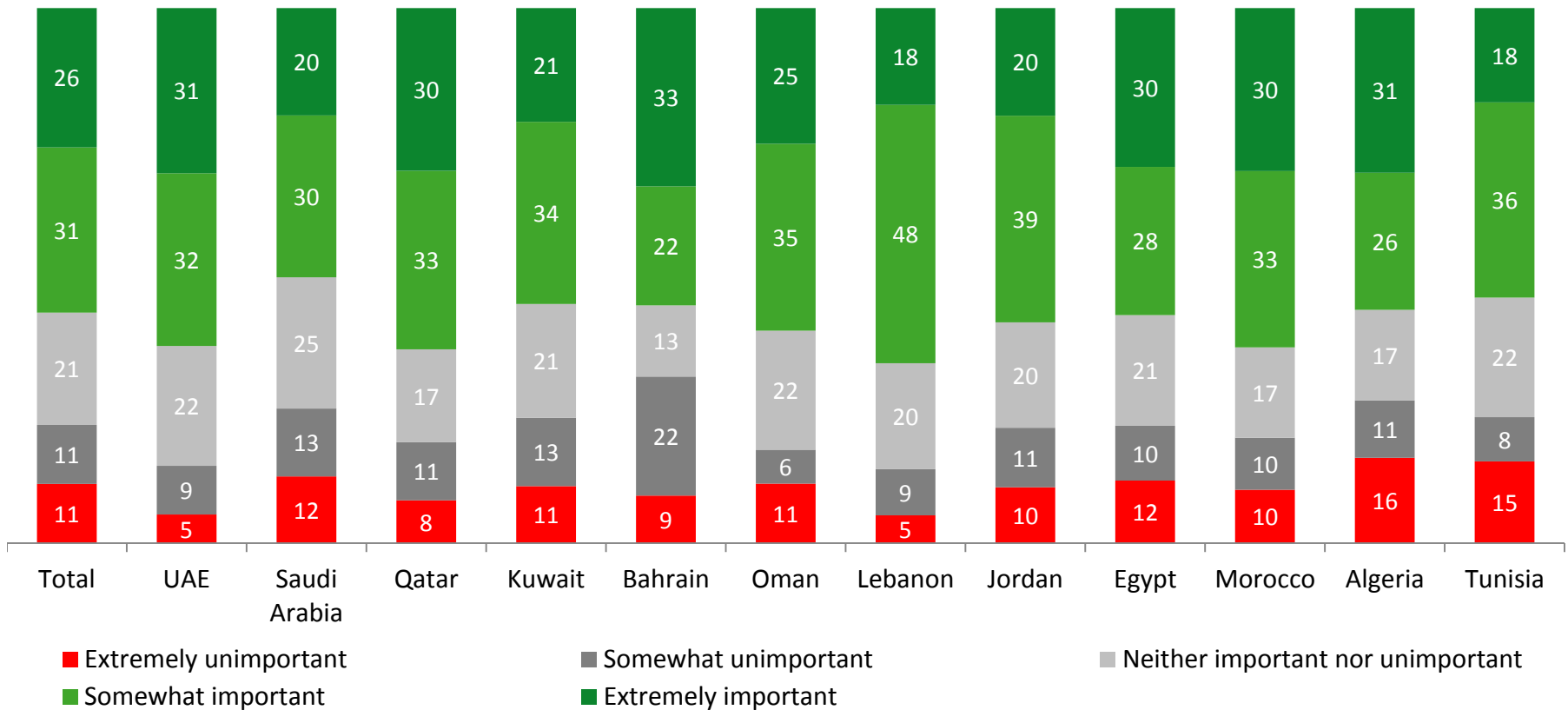
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Q. How important are the following attributes in your workplace?

All figures are %'s

Important factors in workplace - Remote work options

- 57% of respondents claim remote work options are an important aspect in their workplace.



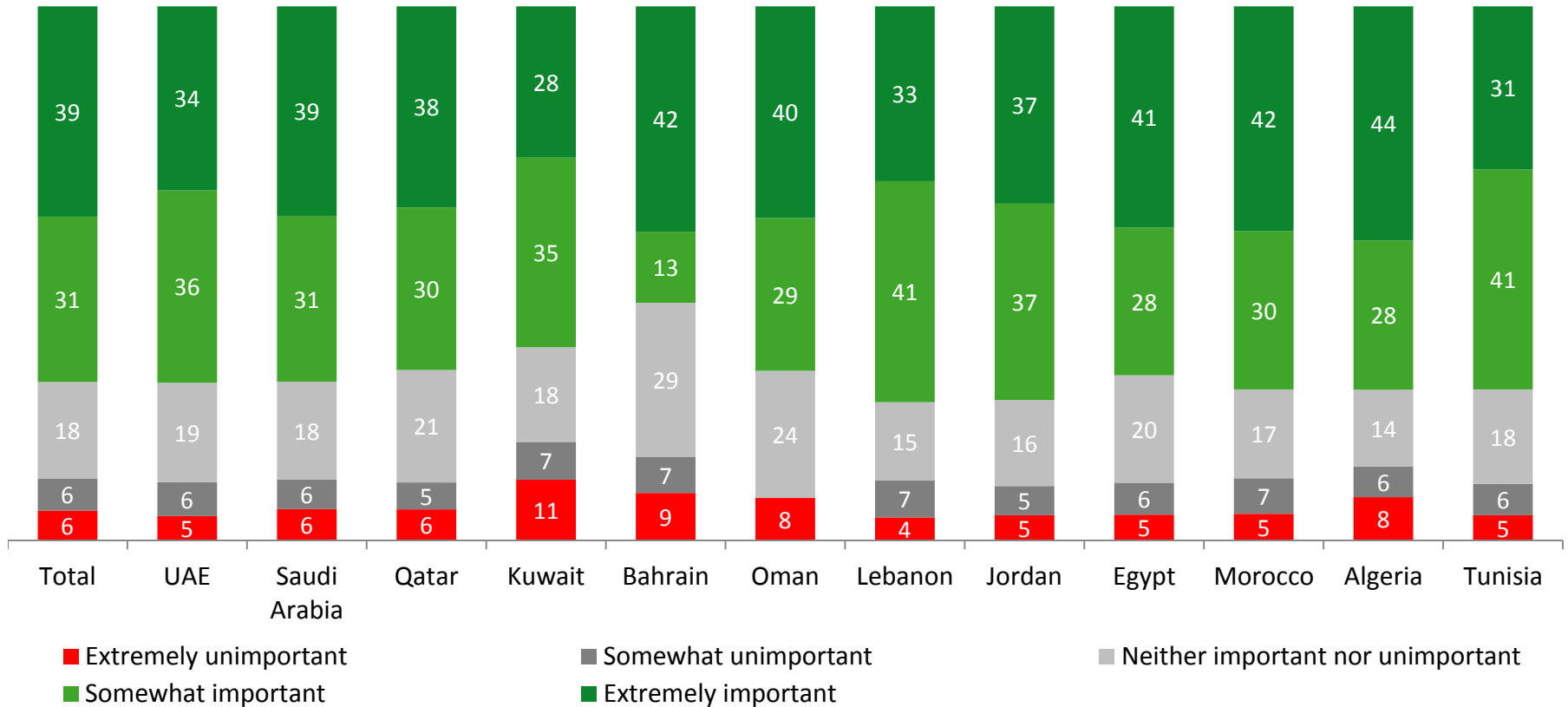
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Q. How important are the following attributes in your workplace?

All figures are %'s

Important factors in workplace - Diversity

- Overall 70% of respondents feel having diversity is an important factor in the workplace. This perception is lower in Bahrain (56%) compared to other countries.



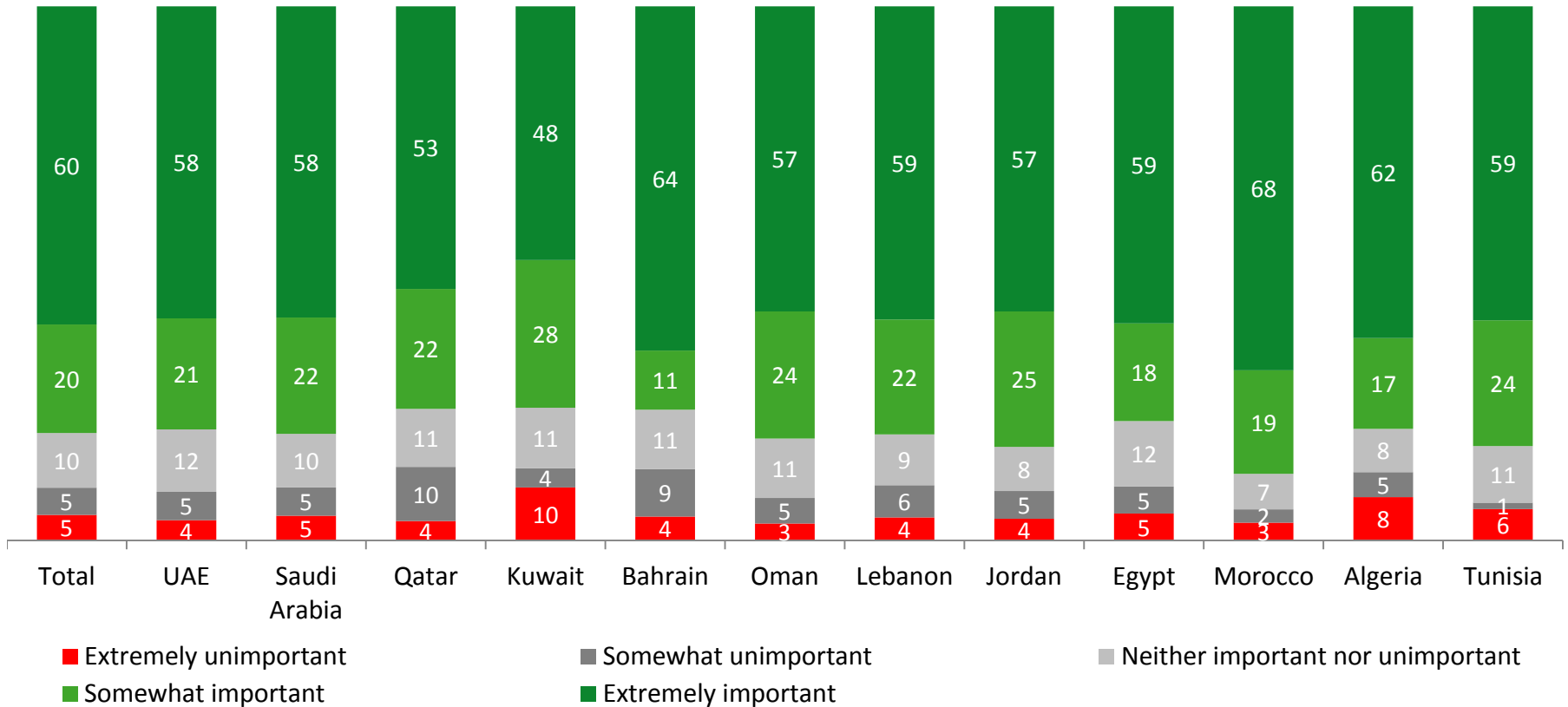
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Q. How important are the following attributes in your workplace?

All figures are %'s

Important factors in workplace - Transparent communication

- While, overall, 80% of respondents feel transparent communication is important in a workplace, this belief is significantly higher in Morocco (88%).



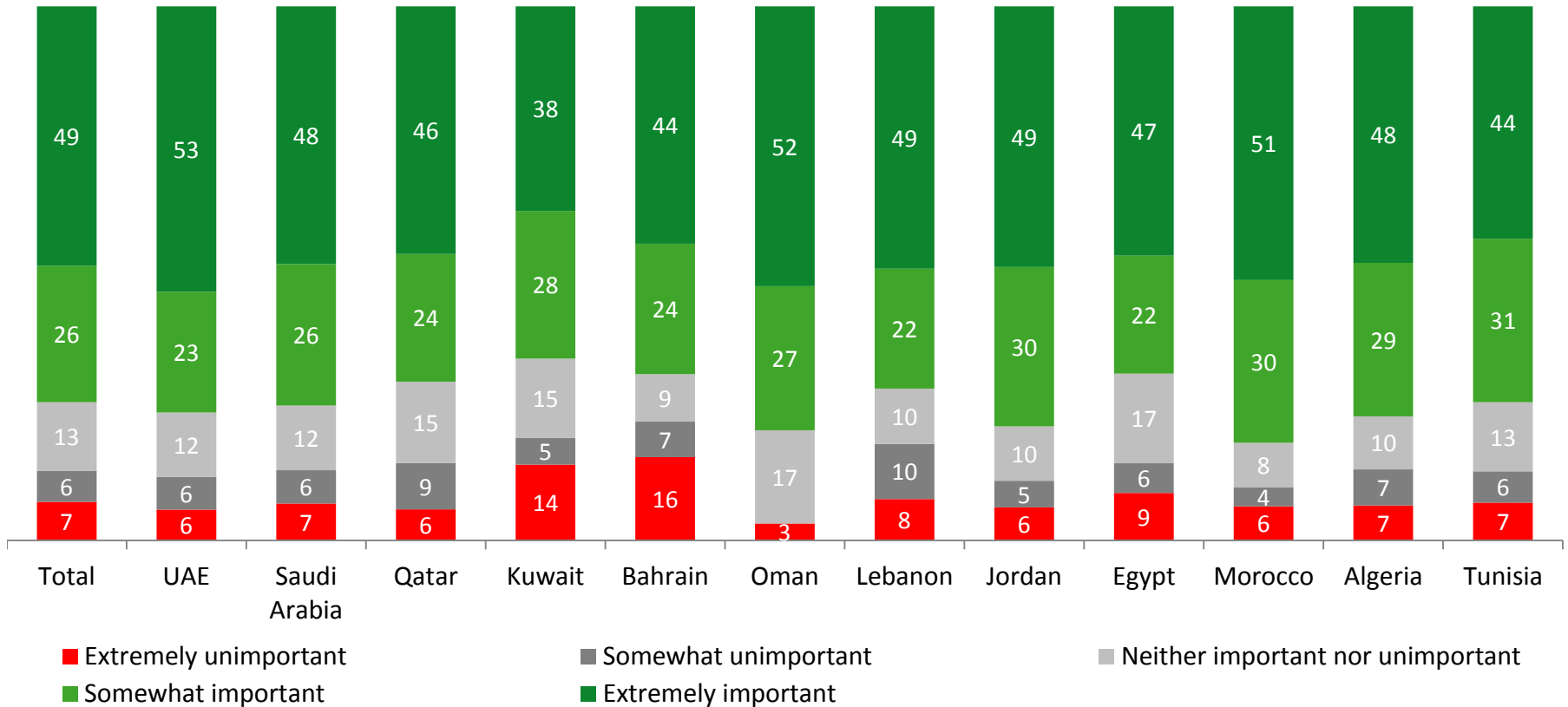
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Q. How important are the following attributes in your workplace?

All figures are %'s

Important factors in workplace - Team-building and fun activities

- 74% of respondents claim having team-building and fun activities is important in a workplace.



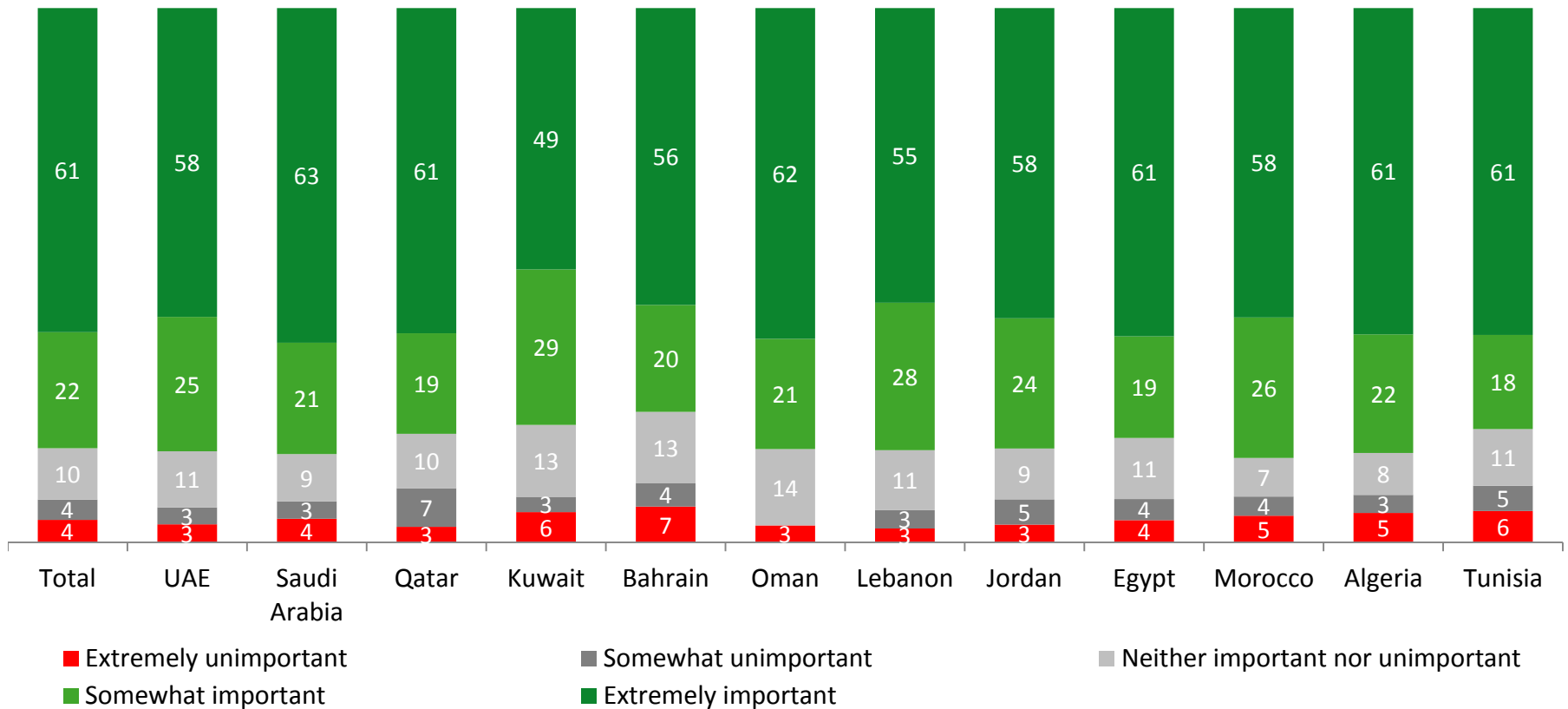
Base: Total (5,624), UAE (505), Saudi Arabia (1,363), Qatar (138), Kuwait (141), Bahrain (45), Oman (63), Lebanon (116), Jordan (422), Egypt (1,452), Morocco (361), Algeria (383), Tunisia (85)

Q. How important are the following attributes in your workplace?

All figures are %'s

Important factors in workplace - Use of advanced technology

- 83% of respondents claim the use of advanced technology is important in a workplace.



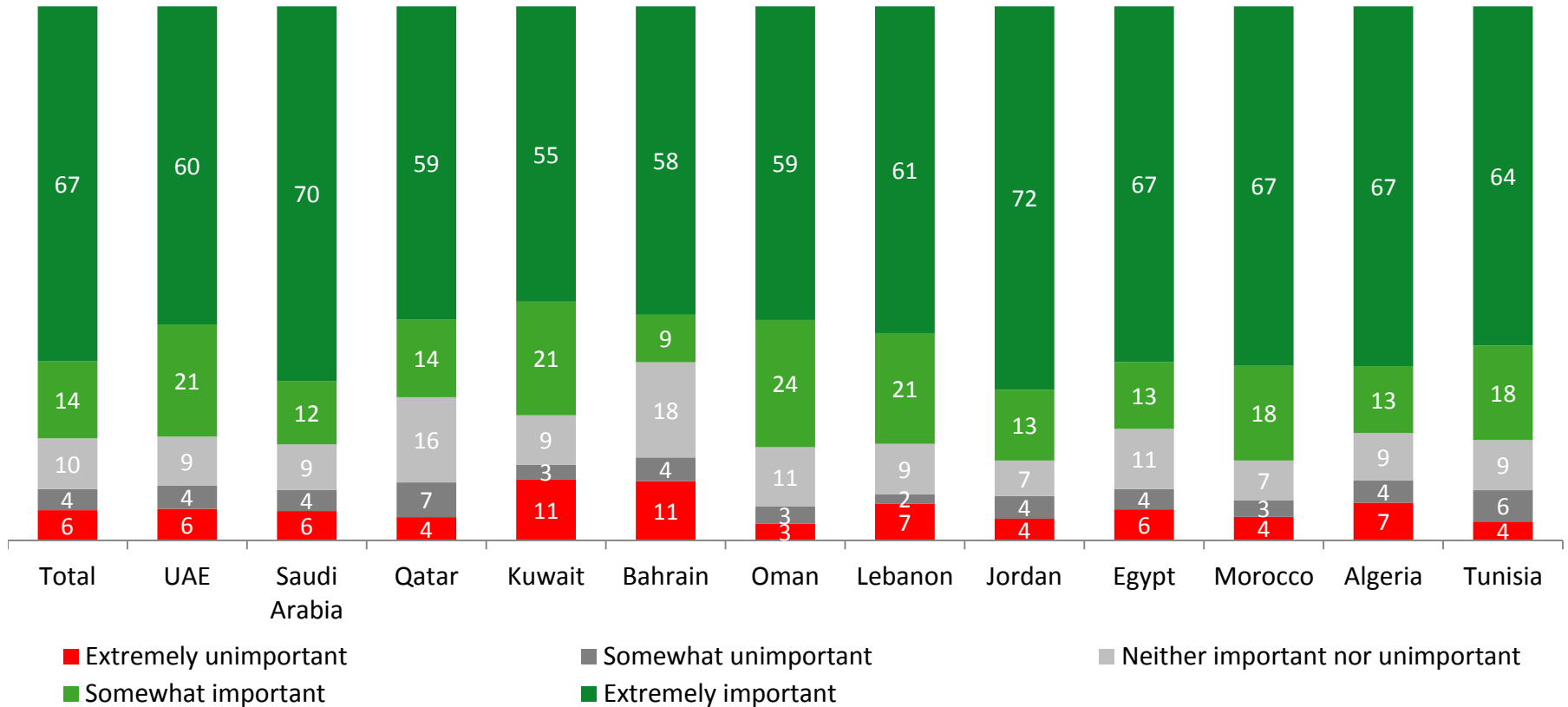
Base: Total (5,624), UAE (505), Saudi Arabia (1,363), Qatar (138), Kuwait (141), Bahrain (45), Oman (63), Lebanon (116), Jordan (422), Egypt (1,452), Morocco (361), Algeria (383), Tunisia (85)

Q. How important are the following attributes in your workplace?

All figures are %'s

Important factors in workplace - Fair Evaluation

- Overall, 81% of respondents feel having fair evaluation is important in a workplace; this perception is lower in Bahrain (67%) compared to other countries.



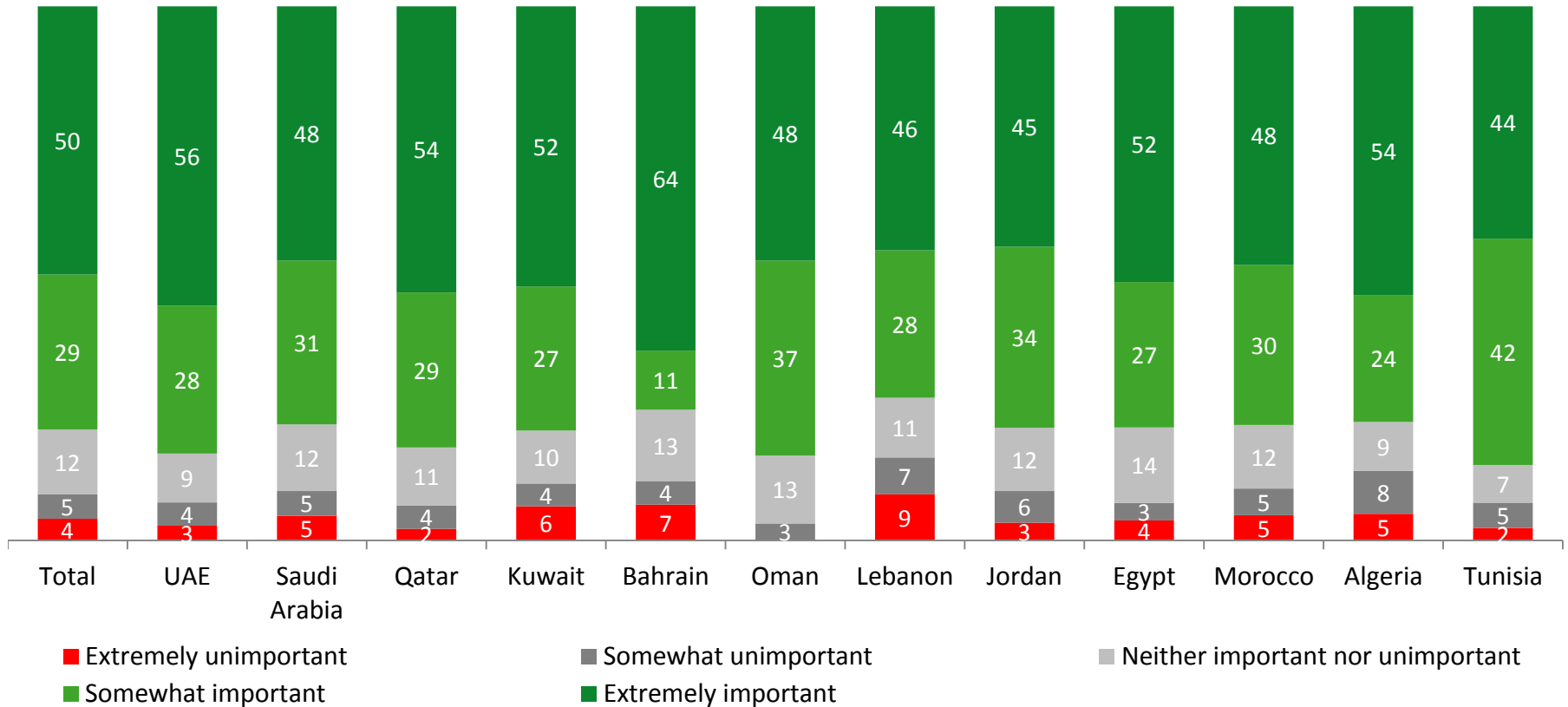
Base: Total (5,624), UAE (505), Saudi Arabia (1,363), Qatar (138), Kuwait (141), Bahrain (45), Oman (63), Lebanon (116), Jordan (422), Egypt (1,452), Morocco (361), Algeria (383), Tunisia (85)

Q. How important are the following attributes in your workplace?

All figures are %'s

Important factors in workplace - Challenging work

- Overall, 79% of respondents feel that having challenging work is an important factor; this belief is marginally higher in UAE (84%) and Tunisia (86%).



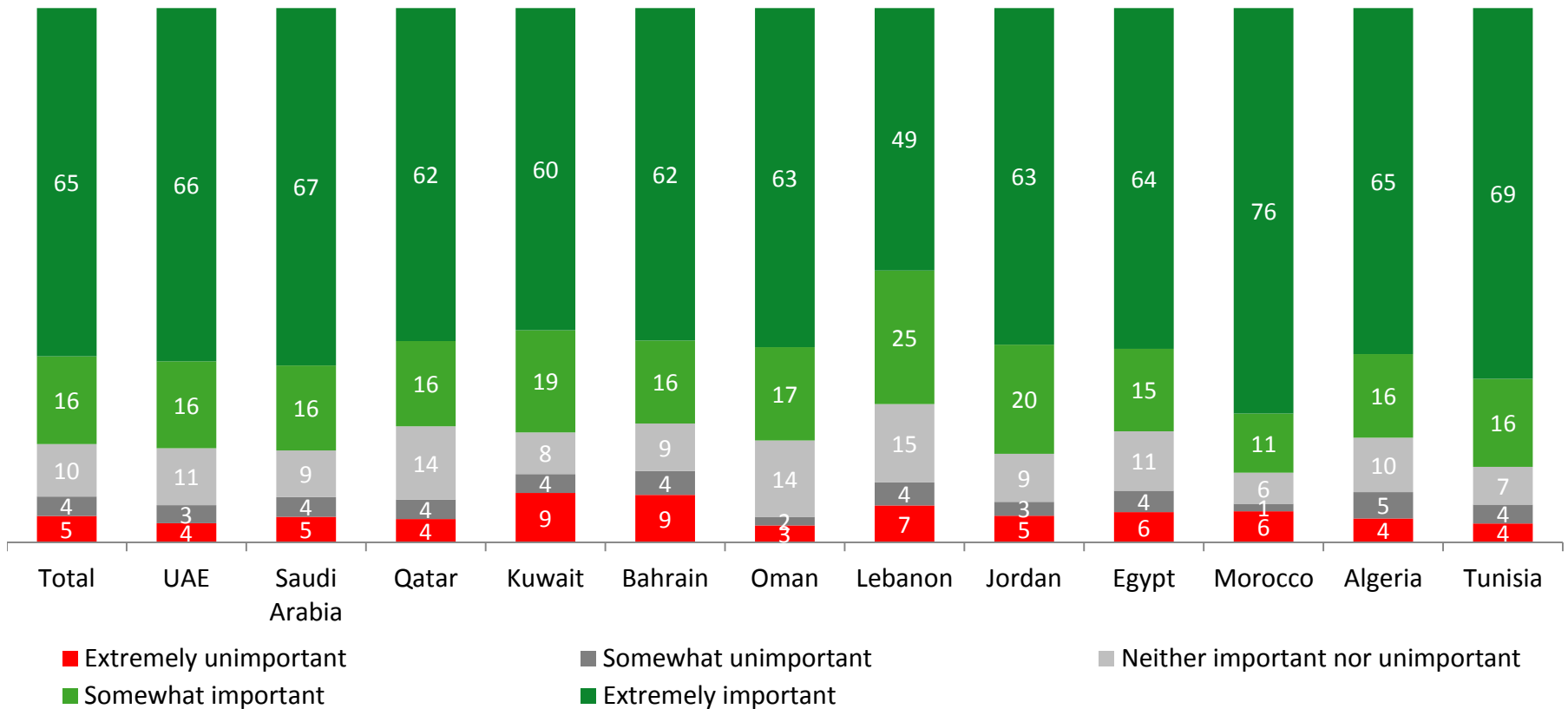
Base: Total (5,624), UAE (505), Saudi Arabia (1,363), Qatar (138), Kuwait (141), Bahrain (45), Oman (63), Lebanon (116), Jordan (422), Egypt (1,452), Morocco (361), Algeria (383), Tunisia (85)

Q. How important are the following attributes in your workplace?

All figures are %'s

Important factors in workplace - Work life Balance

- Only 9% of respondents claim that having a work-life balance is not an important aspect.



Base: Total (5,624), UAE (505), Saudi Arabia (1,363), Qatar (138), Kuwait (141), Bahrain (45), Oman (63), Lebanon (116), Jordan (422), Egypt (1,452), Morocco (361), Algeria (383), Tunisia (85)

Q. How important are the following attributes in your workplace?

All figures are %'s



IDEAL WORKPLACE SIZE AND CULTURE

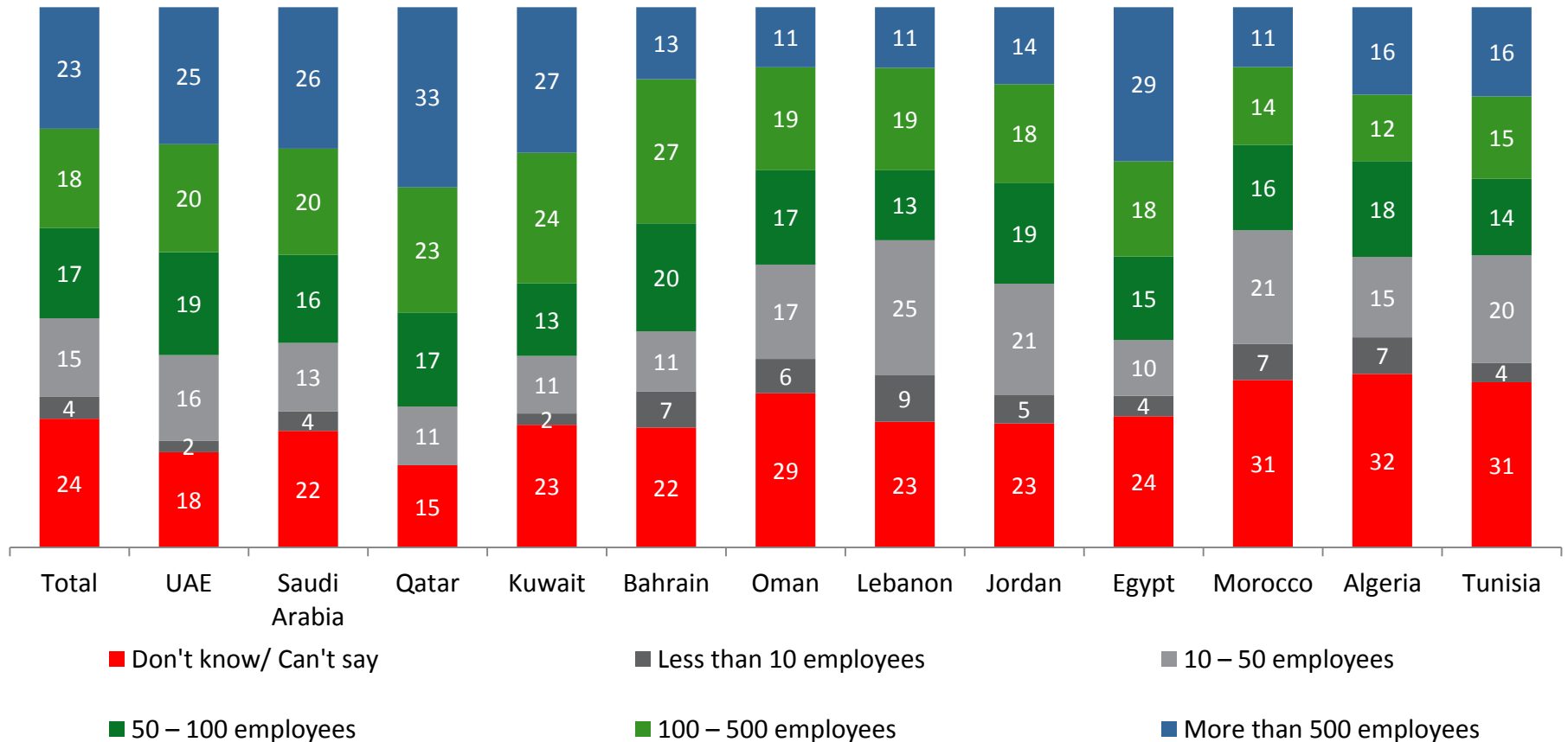
Summary

- A higher preference for larger companies can be observed as 59% of respondents feel an ideal company should have 50+ employees.
- 40% of respondents claim it is easy to access information about company culture and environment when applying for a job.
- Word of mouth (25%) followed by online company pages targeting job seekers (24%) and social media (22%) are perceived as the best ways to promote company culture among job seekers.
- Good ethics and practices (53%) and friendly company culture (37%) are the top two most attractive business values to job seekers.
- Company benefits and perks (60%), followed by employee testimonials and reviews (38%) are the most sought-after information that would most excite respondents to join a company.
- Half (48%) of respondents claim company culture is a determining factor in joining a company.



Ideal company size

- A higher preference for larger companies can be observed as 59% of respondents feel an ideal company should have 50+ employees.



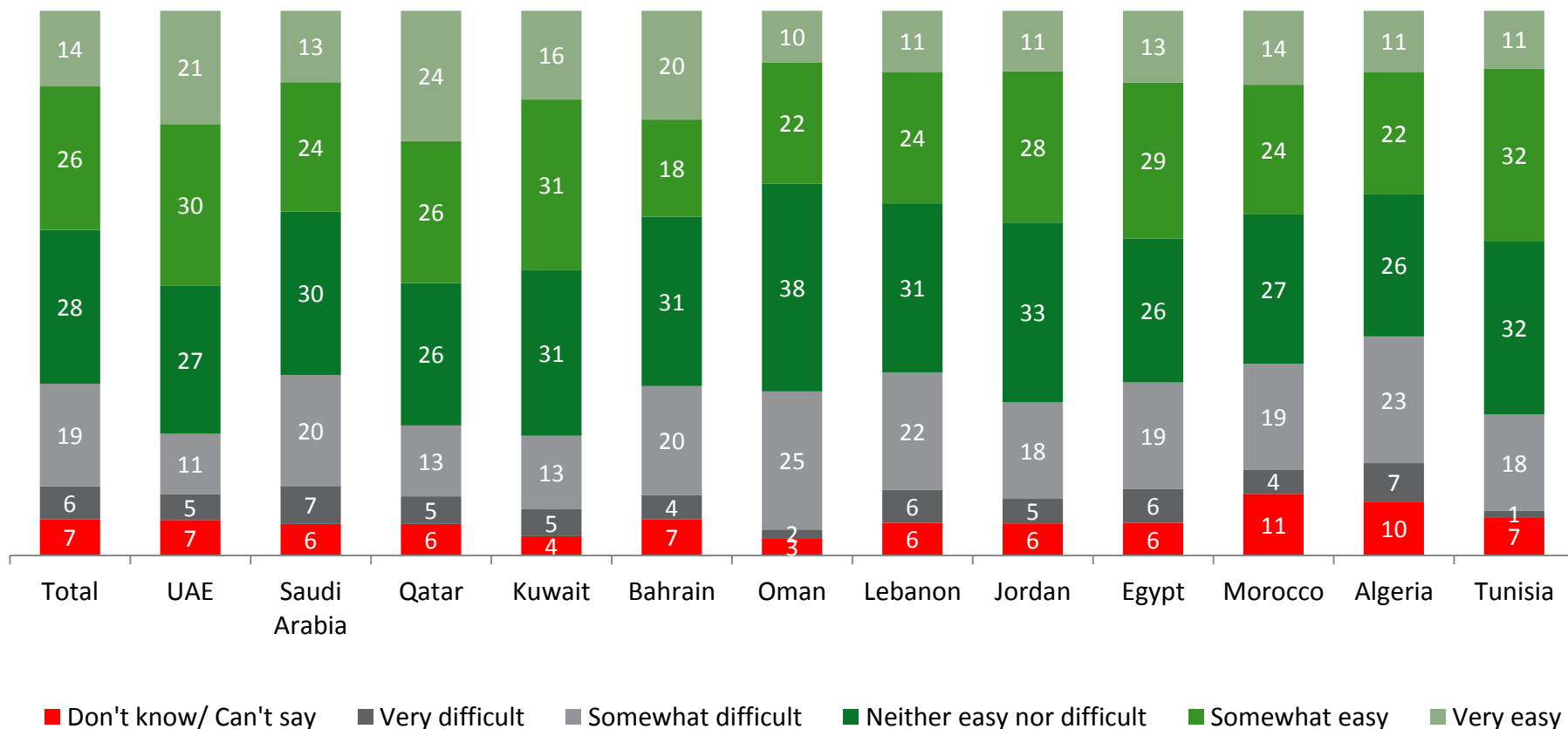
Base: Total (5,624), UAE (505), Saudi Arabia (1,363), Qatar (138), Kuwait (141), Bahrain (45), Oman (63), Lebanon (116), Jordan (422), Egypt (1,452), Morocco (361), Algeria (383), Tunisia (85)

Q. What according to you is the ideal size of a company?

All figures are %'s

Ease of access to information on company culture

- 40% of respondents claim it is easy to access information about company culture and environment when applying for a job.



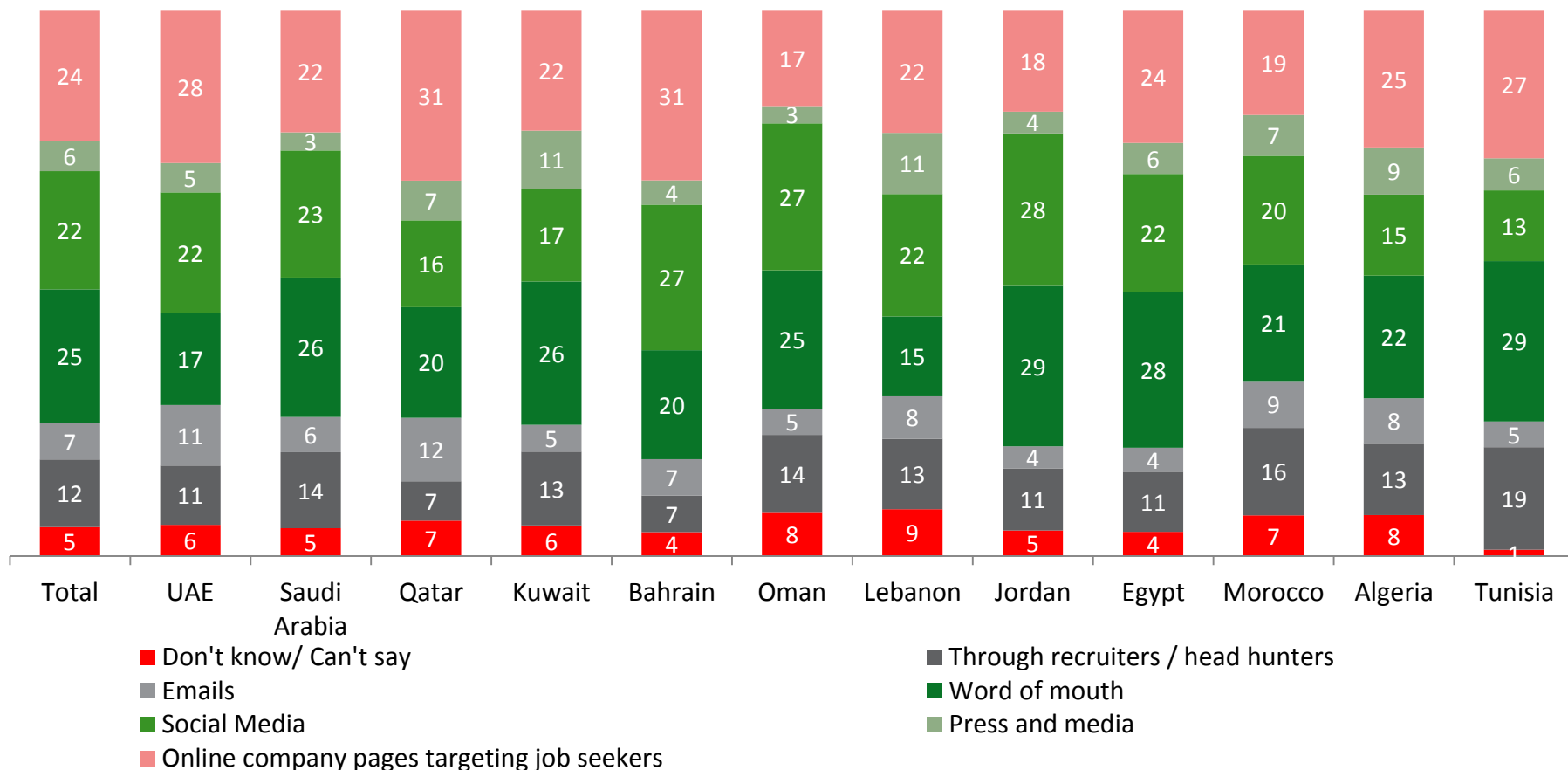
Base: Total (5,624), UAE (505), Saudi Arabia (1,363), Qatar (138), Kuwait (141), Bahrain (45), Oman (63), Lebanon (116), Jordan (422), Egypt (1,452), Morocco (361), Algeria (383), Tunisia (85)

Q. How easy is it for you to access information about company culture and work environment when applying for jobs?

All figures are %'s

Ways of promoting company culture

- Word of mouth (25%) followed by online company pages targeting job seekers (24%) and social media (22%) are perceived as the best ways to promote company culture among job seekers.



Base: Total (5,624), UAE (505), Saudi Arabia (1,363), Qatar (138), Kuwait (141), Bahrain (45), Oman (63), Lebanon (116), Jordan (422), Egypt (1,452), Morocco (361), Algeria (383), Tunisia (85)

Q. What is the best way for companies to promote their company culture to job seekers?

All figures are %'s

Attractiveness of business values

- Good ethics and practices (53%) and friendly company culture (37%) are the top two most attractive business values to job seekers.

	Total	UAE	Saudi Arabia	Qatar	Kuwait	Bahrain	Oman	Lebanon	Jordan	Egypt	Morocco	Algeria	Tunisia
Corporate Social Responsibility (CSR)	24	24	25	28	18	29	14	22	17	24	30	25	38
Friendly company culture	37	42	38	37	42	40	43	41	33	36	38	31	49
Green consciousness / efforts	12	10	12	12	8	9	5	9	10	12	17	10	4
Good ethics and practices	53	52	52	50	45	58	54	54	54	51	57	60	55
Don't know/ Can't say	14	9	15	6	16	7	5	9	14	17	12	13	6

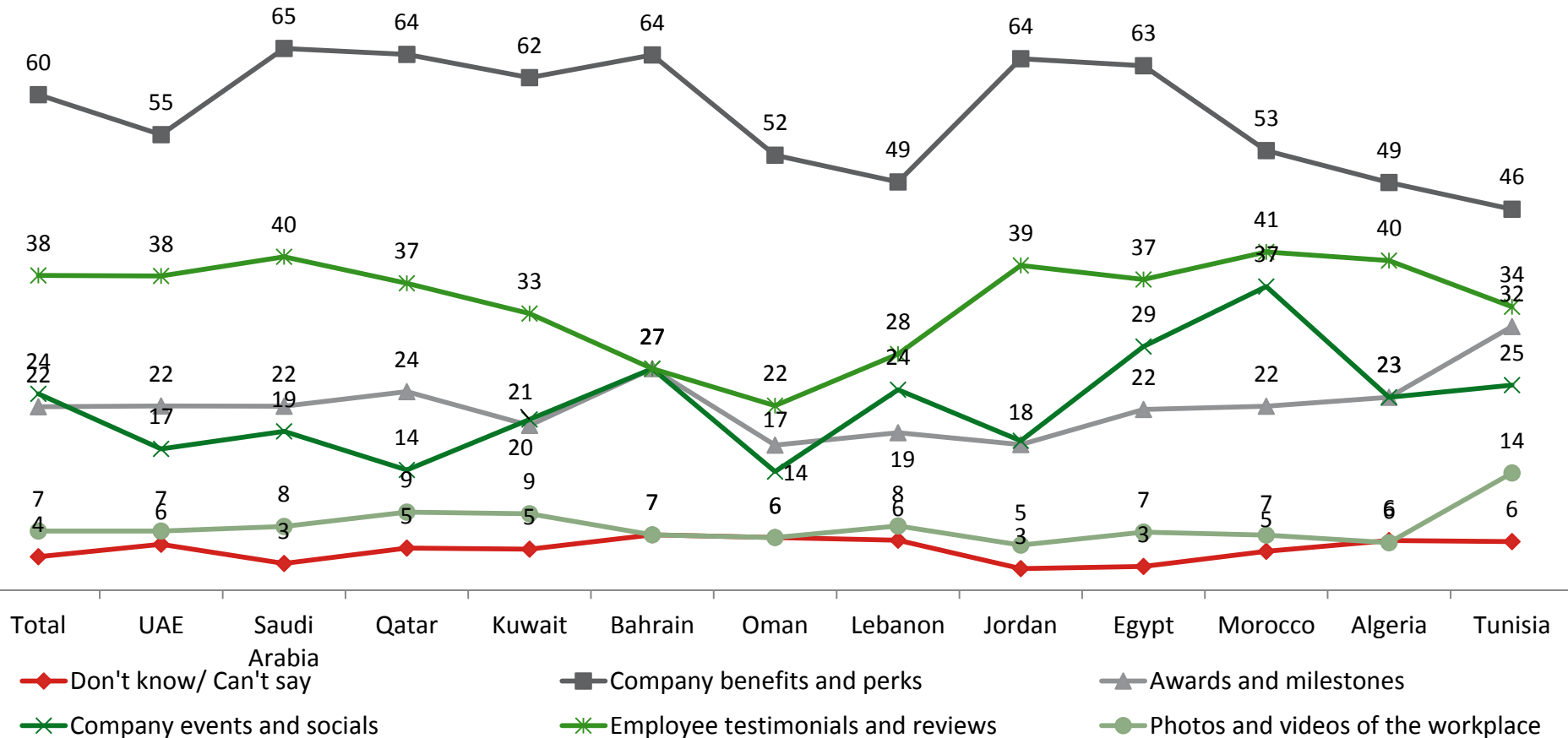
Base: Total (5,624), UAE (505), Saudi Arabia (1,363), Qatar (138), Kuwait (141), Bahrain (45), Oman (63), Lebanon (116), Jordan (422), Egypt (1,452), Morocco (361), Algeria (383), Tunisia (85)

Q. In your opinion, what business values make a company most attractive for job seekers?

All figures are %'s

Most useful company information for job seekers

- Company benefits and perks (60%), followed by employee testimonials and reviews (38%) are the most sought-after information that would most excite respondents to join a company.



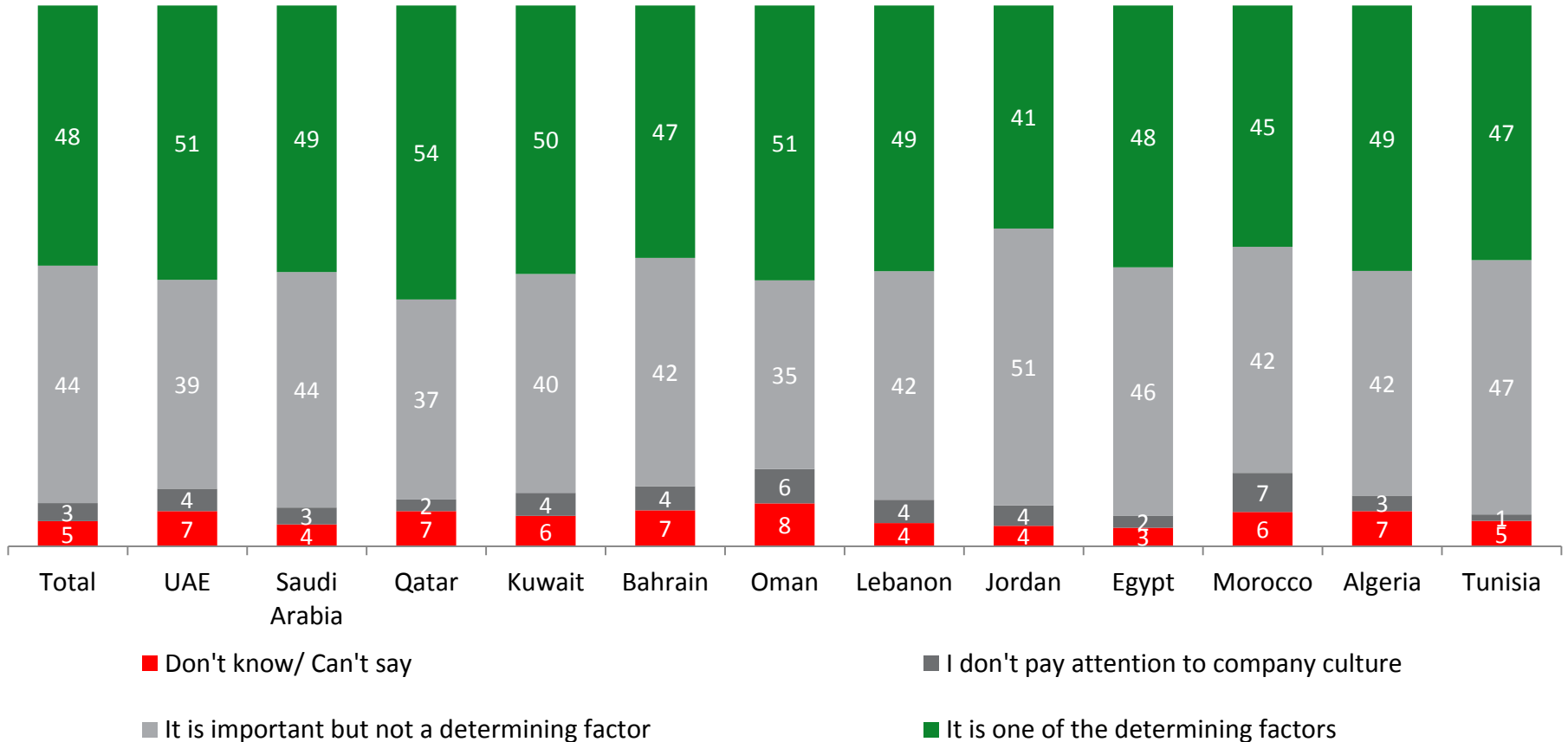
Base: Total (5,624), UAE (505), Saudi Arabia (1,363), Qatar (138), Kuwait (141), Bahrain (45), Oman (63), Lebanon (116), Jordan (422), Egypt (1,452), Morocco (361), Algeria (383), Tunisia (85)

Q. What type of information would most excite you to join a company as an employee?

All figures are %'s

Importance of company culture

- Half (48%) of respondents claim company culture is a determining factor in joining a company.



Base: Total (5,624), UAE (505), Saudi Arabia (1,363), Qatar (138), Kuwait (141), Bahrain (45), Oman (63), Lebanon (116), Jordan (422), Egypt (1,452), Morocco (361), Algeria (383), Tunisia (85)

Q. What type of information would most excite you to join a company as an employee?

All figures are %'s



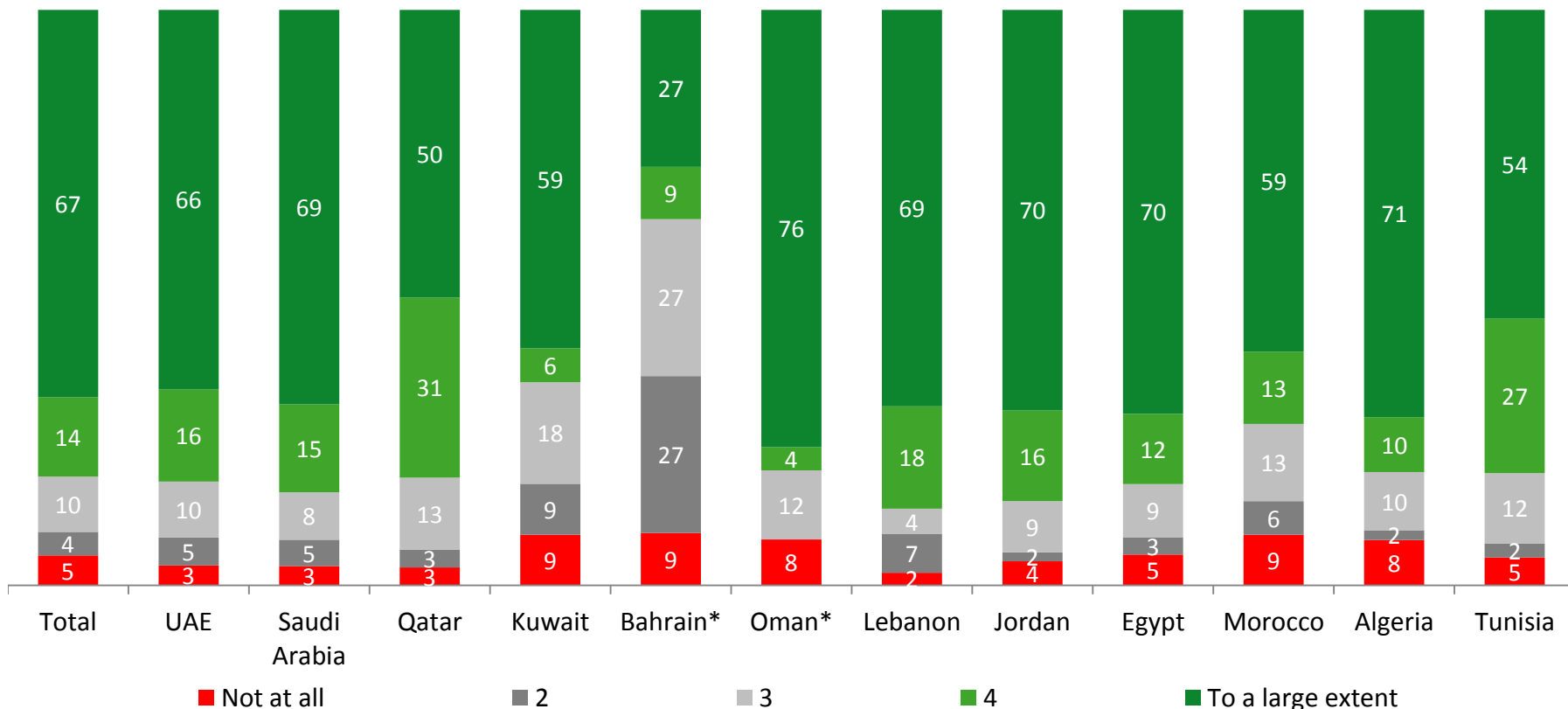
ATTRIBUTES SOUGHT IN POTENTIAL WORKPLACE

Summary

- 81% of potential job seekers seek a workplace that encourages innovation and creativity.
- Overall, 59% of potential job seekers feel that a workplace should have an attractive design/layout. This perception is higher among respondents in the Gulf (66%) when compared to Levant (56%) and North Africa (56%).
- Across the region, 58% of respondents feel that their potential workplace should promote flexibility by giving employees the option to work remotely.
- Among respondents who are not working, 7 in 10 feel that their potential work place should promote diversity.
- 81% feel that their potential workplace should nurture a trustworthy relationship with its employees; this belief is relatively lower in Kuwait (62%).
- 4 in 5 (82%) respondents feel that their potential workplace should communicate with employees transparently.
- 77% of respondents feel that their potential workplace should promote team-building and fun activities; this expectation is lower among respondents in Lebanon (66%).
- 83% feel their potential workplace should promote the use of advanced technology.

Potential workplace - Should encourage innovation and creativity

- 81% of potential job seekers seek a workplace that encourages innovation and creativity.



*Data for Bahrain and Oman on small base

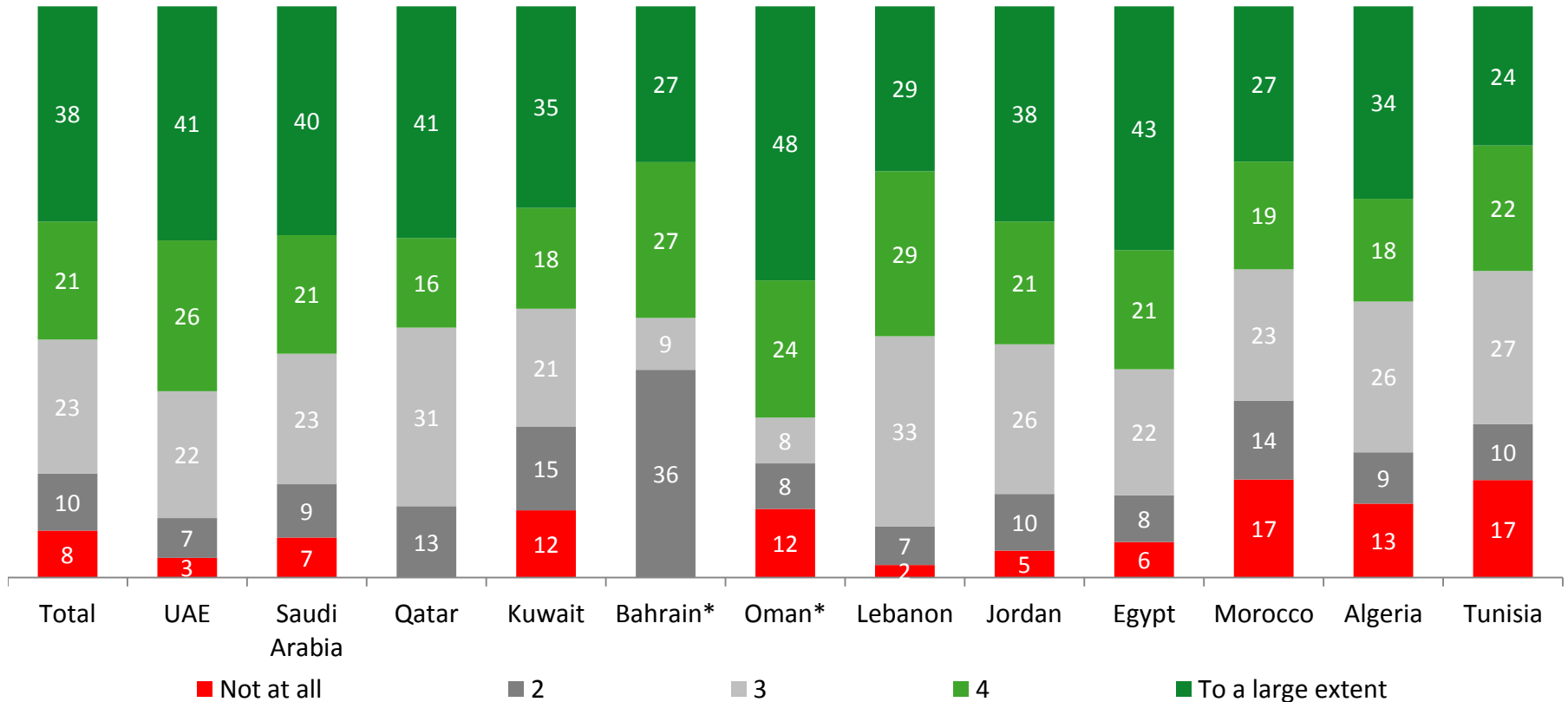
Base: Total (2,168), UAE (144), Saudi Arabia (569), Qatar (32), Kuwait (34), Bahrain (11*), Oman (25*), Lebanon (45), Jordan (191), Egypt (466), Morocco (239), Algeria (178), Tunisia (41)

Q. Please indicate to what extent you feel that the following attributes should exist at your potential workplace. My potential workplace....

All figures are %'s

Potential workplace - Should have an attractive office design/layout

- Overall, 59% of potential job seekers feel that a workplace should have an attractive design/layout. This perception is higher among respondents in the Gulf (66%) when compared to Levant (56%) and North Africa (56%).



*Data for Bahrain and Oman on small base

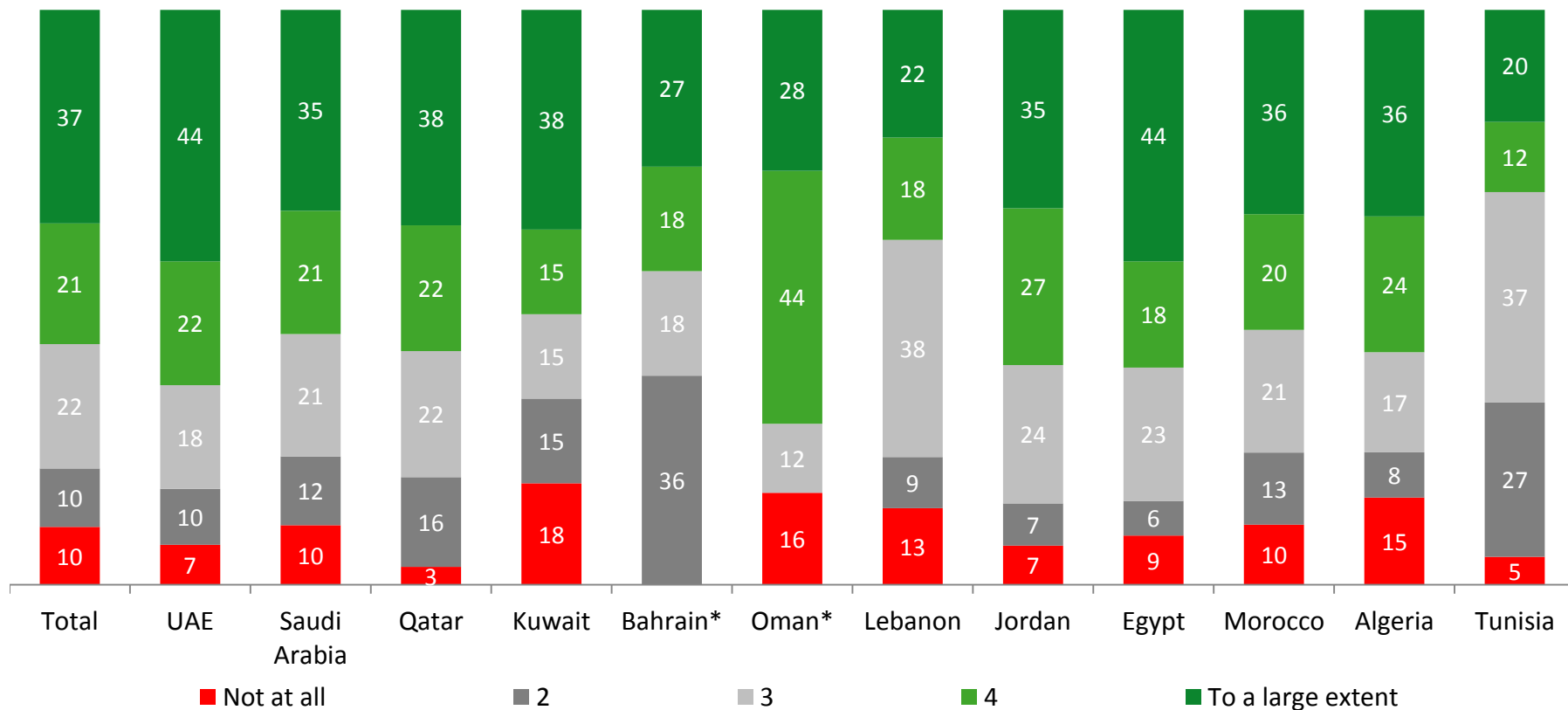
Base: Total (2,168), UAE (144), Saudi Arabia (569), Qatar (32), Kuwait (34), Bahrain (11*), Oman (25*), Lebanon (45), Jordan (191), Egypt (466), Morocco (239), Algeria (178), Tunisia (41)

Q. Please indicate to what extent you feel that the following attributes should exist at your potential workplace. My potential workplace....

All figures are %'s

Potential workplace - Should promote flexibility by giving employees the option to work remotely

- Across the region, 58% of respondents feel that their potential workplace should promote flexibility by giving employees the option to work remotely.



*Data for Bahrain and Oman on small base

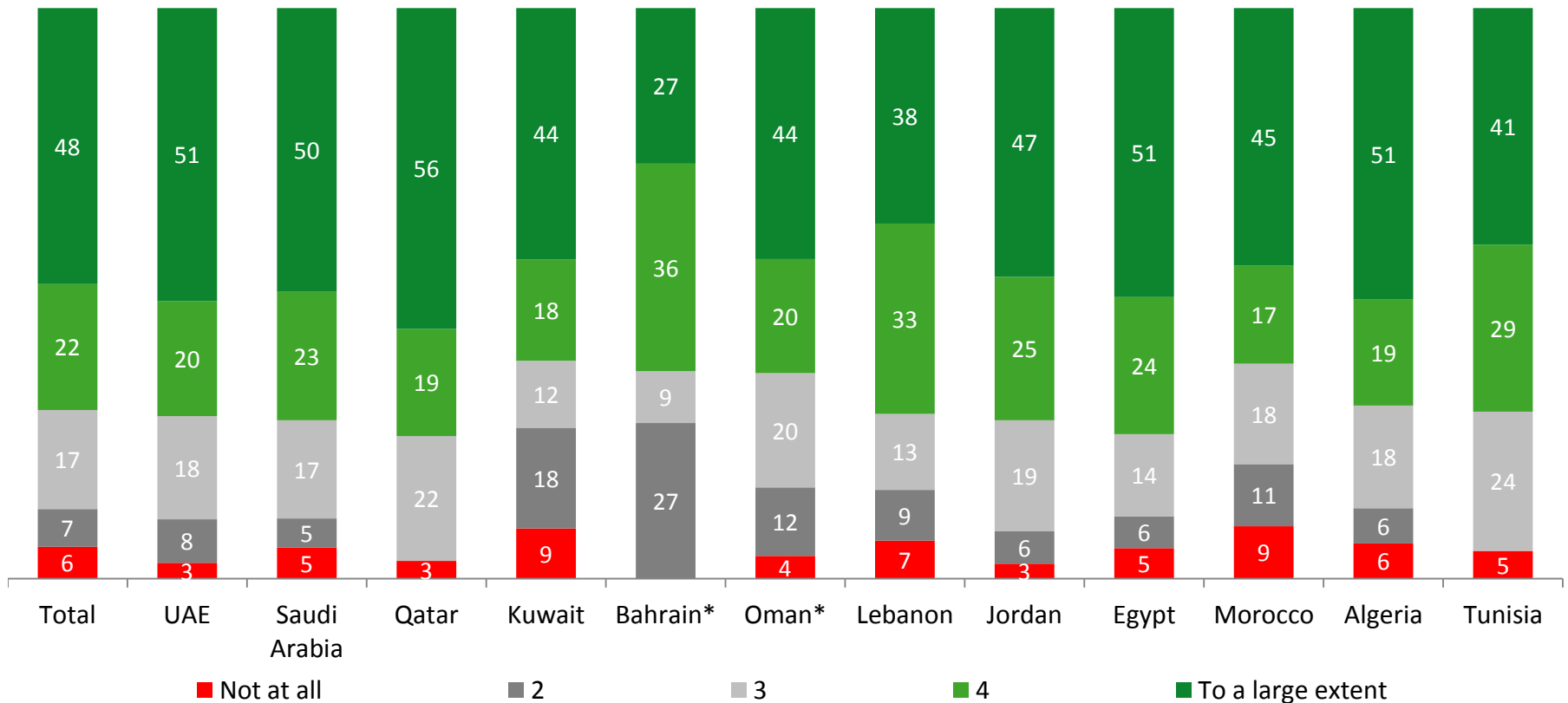
Base: Total (2,168), UAE (144), Saudi Arabia (569), Qatar (32), Kuwait (34), Bahrain (11*), Oman (25*), Lebanon (45), Jordan (191), Egypt (466), Morocco (239), Algeria (178), Tunisia (41)

Q. Please indicate to what extent you feel that the following attributes should exist at your potential workplace. My potential workplace....

All figures are %'s

Potential workplace - Should encourage diversity

- Among respondents who are not working, 7 in 10 feel that their potential work place should promote diversity.



*Data for Bahrain and Oman on small base

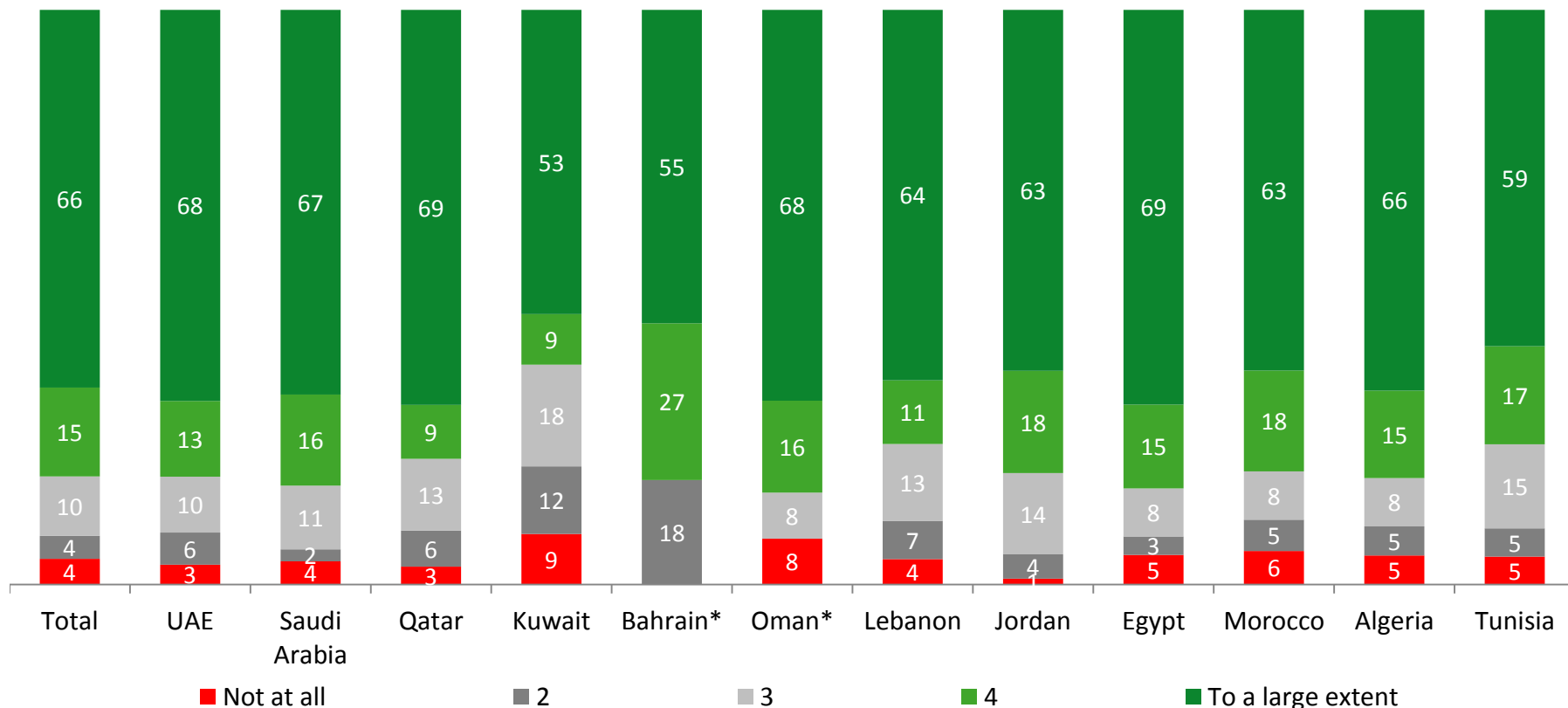
Base: Total (2,168), UAE (144), Saudi Arabia (569), Qatar (32), Kuwait (34), Bahrain (11*), Oman (25*), Lebanon (45), Jordan (191), Egypt (466), Morocco (239), Algeria (178), Tunisia (41)

Q. Please indicate to what extent you feel that the following attributes should exist at your potential workplace. My potential workplace....

All figures are %'s

Potential workplace - Should nurture a trustworthy relationship with its employees

- 81% feel that their potential workplace should nurture a trustworthy relationship with its employees; this belief is relatively lower in Kuwait (62%).



*Data for Bahrain and Oman on small base

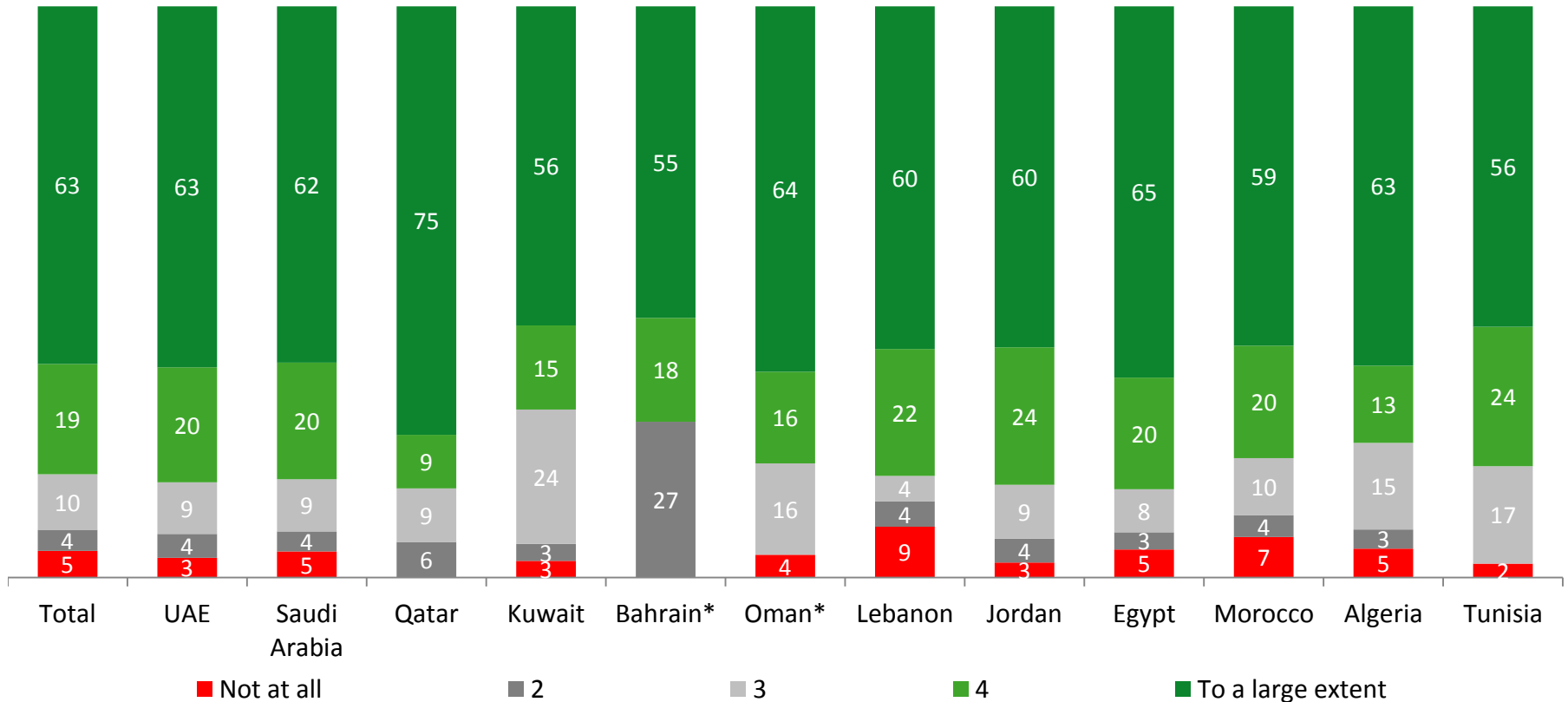
Base: Total (2,168), UAE (144), Saudi Arabia (569), Qatar (32), Kuwait (34), Bahrain (11*), Oman (25*), Lebanon (45), Jordan (191), Egypt (466), Morocco (239), Algeria (178), Tunisia (41)

Q. Please indicate to what extent you feel that the following attributes should exist at your potential workplace. My potential workplace....

All figures are %'s

Potential workplace - Should communicate with employees transparently

- 4 in 5 (82%) respondents feel that their potential workplace should communicate with employees transparently.



*Data for Bahrain and Oman on small base

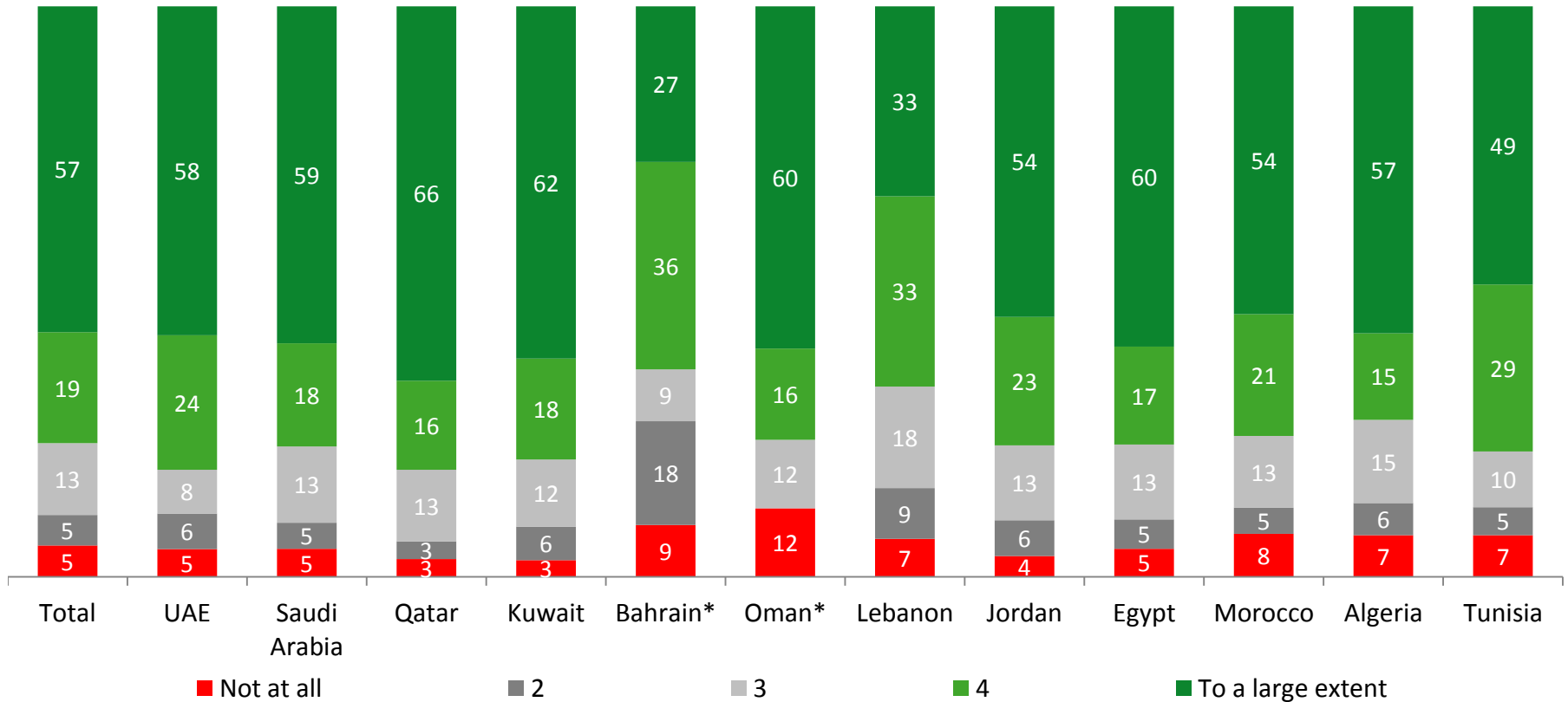
Base: Total (2,168), UAE (144), Saudi Arabia (569), Qatar (32), Kuwait (34), Bahrain (11*), Oman (25*), Lebanon (45), Jordan (191), Egypt (466), Morocco (239), Algeria (178), Tunisia (41)

Q. Please indicate to what extent you feel that the following attributes should exist at your potential workplace. My potential workplace....

All figures are %'s

Potential workplace - Should promote team-building and fun activities

- 77% of respondents feel that their potential workplace should promote team-building and fun activities; this expectation is lower among respondents in Lebanon (66%).



*Data for Bahrain and Oman on small base

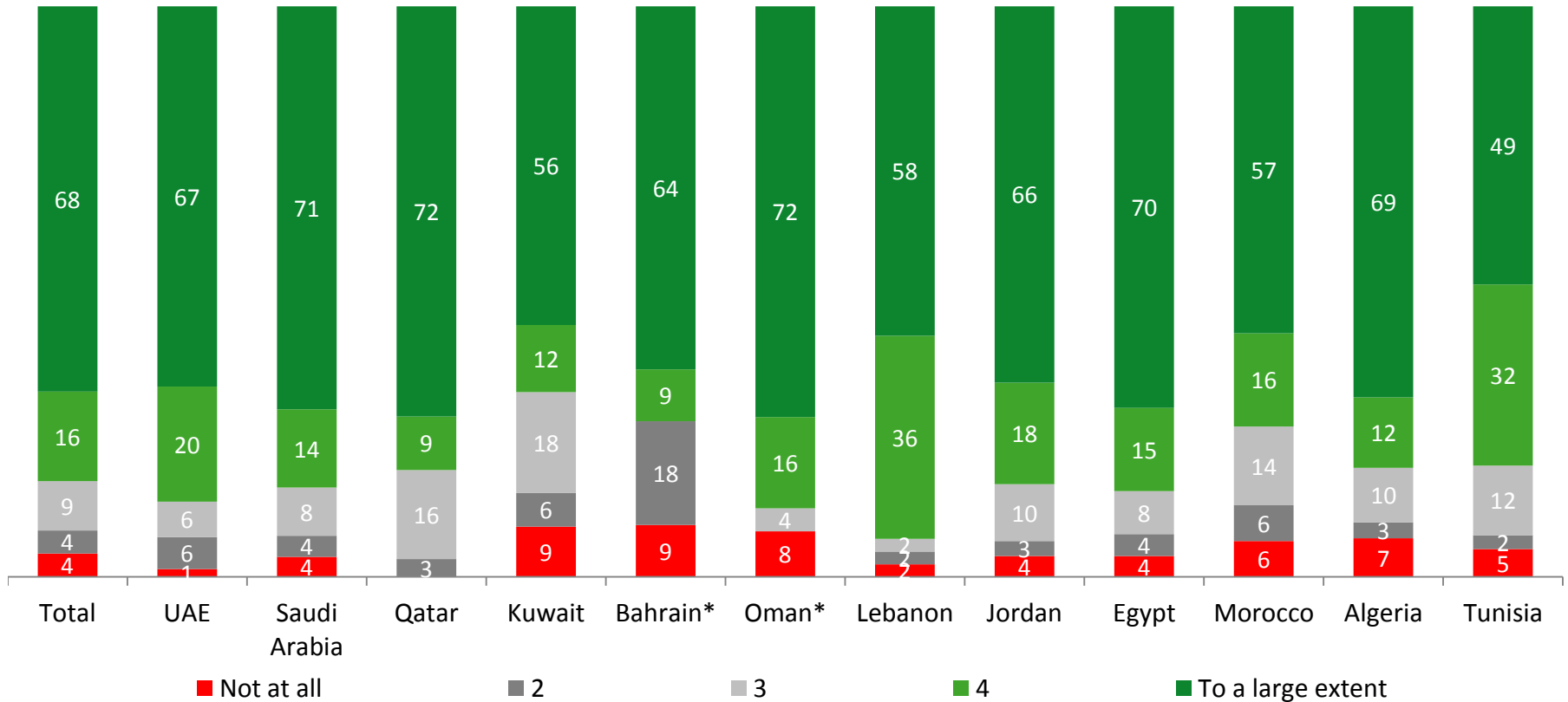
Base: Total (2,168), UAE (144), Saudi Arabia (569), Qatar (32), Kuwait (34), Bahrain (11*), Oman (25*), Lebanon (45), Jordan (191), Egypt (466), Morocco (239), Algeria (178), Tunisia (41)

Q. Please indicate to what extent you feel that the following attributes should exist at your potential workplace. My potential workplace....

All figures are %'s

Potential workplace - Should promote the use of advanced technology

- 83% feel their potential workplace should promote the use of advanced technology.



*Data for Bahrain and Oman on small base

Base: Total (2,168), UAE (144), Saudi Arabia (569), Qatar (32), Kuwait (34), Bahrain (11*), Oman (25*), Lebanon (45), Jordan (191), Egypt (466), Morocco (239), Algeria (178), Tunisia (41)

Q. Please indicate to what extent you feel that the following attributes should exist at your potential workplace. My potential workplace....

All figures are %'s



Section 3

DEMOGRAPHICS

Respondent Profile

Gender

- Male – 79%
- Female – 21%

Age

- 18-24 – 9%
- 25-34 – 56%
- 35-44 – 25%
- 45+ – 10%

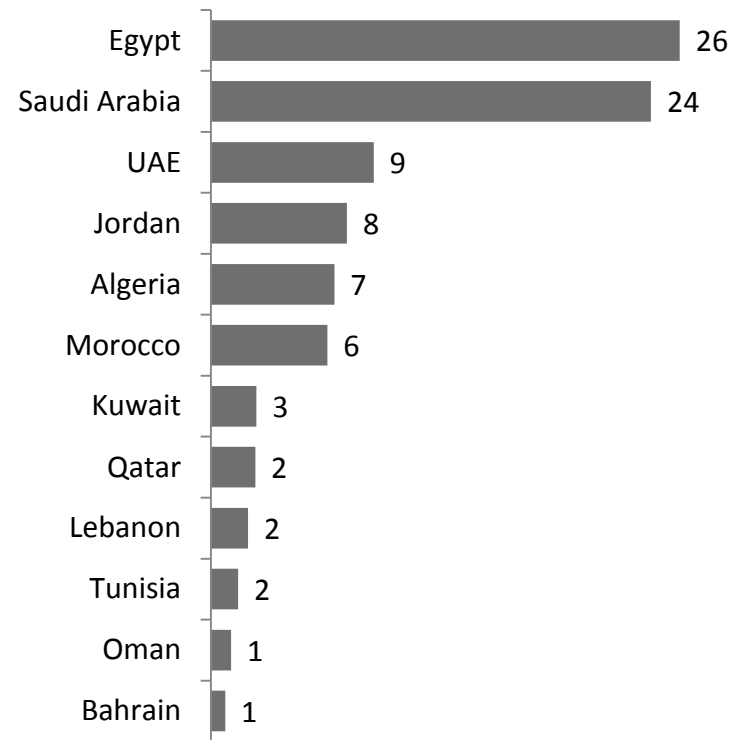
Nationality group

- Gulf – 15%
- Levant – 16%
- North African – 51%
- Westerner – 0%
- Asian – 10%
- Other – 5%

Main income earner

- Yes – 72%
- No – 28%

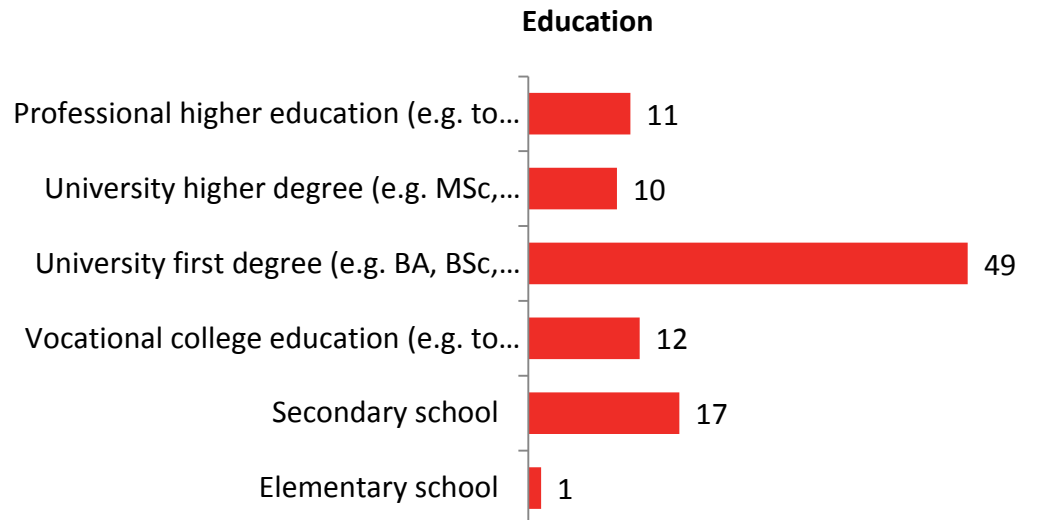
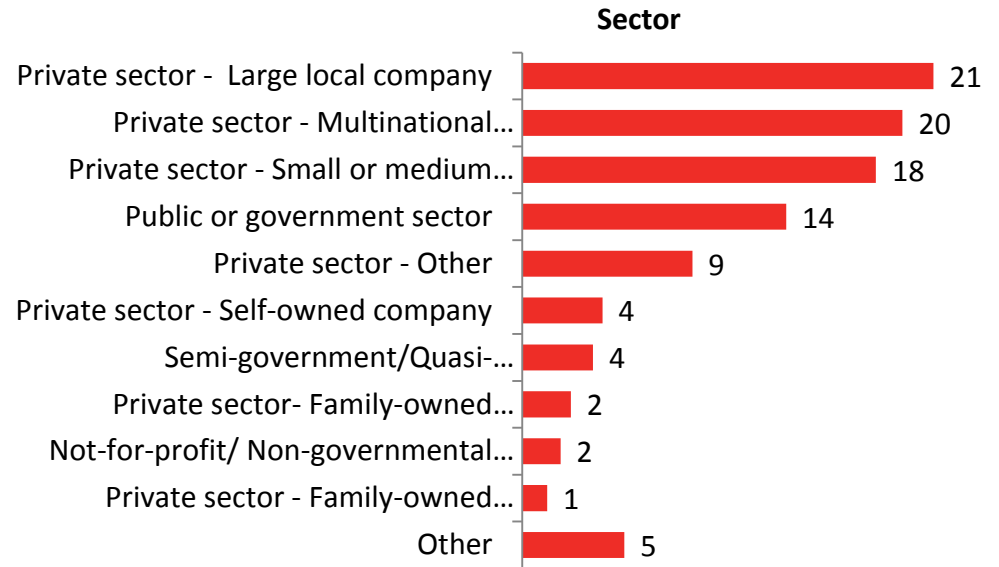
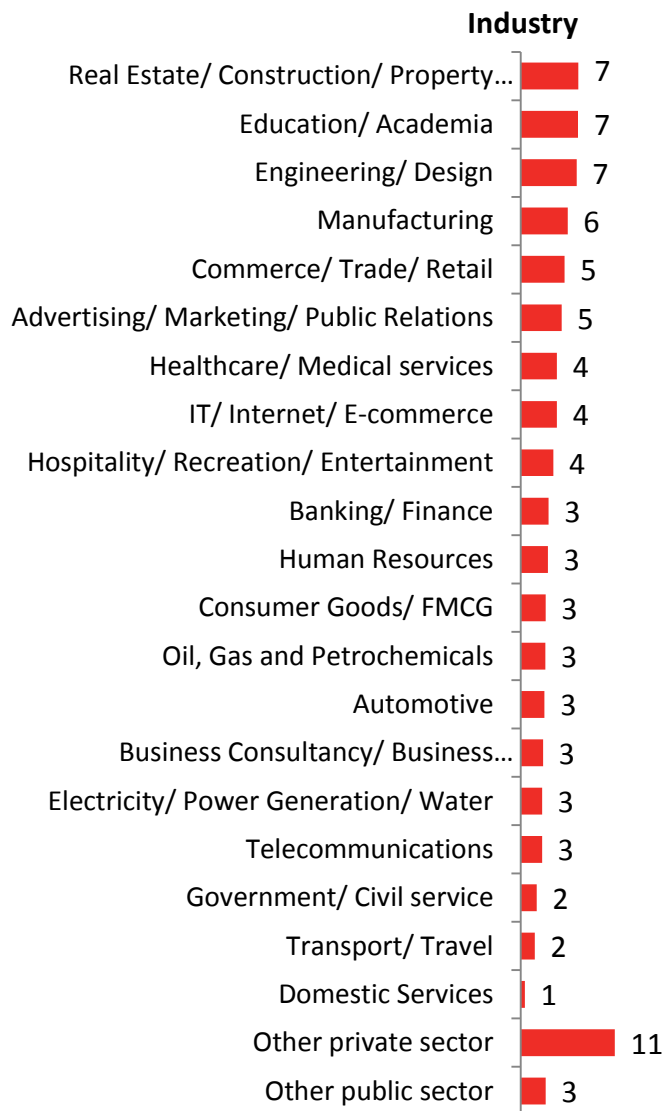
Country of residence



Base: Total (3,879)

All figures are %'s

Respondent Profile



Base: Total (3,879)

Other: 10%

All figures are %'s



Thank you