

# The Bayt.com Middle East Jobseeker Confidence Survey

August 2017





Section 1

# PROJECT BACKGROUND

# Objectives

- To gauge perceptions and attitudes of jobseekers regarding the economy of their countries.
- To identify trends in the Middle East and North Africa job market.
- To provide an understanding of their personal financial and job situation, their likelihood to purchase and invest.

# Project Background

- Jobseeker confidence is a measure of the economic wellbeing of a country.
- It is a reflection of jobseeker satisfaction levels and expectations based on various factors in the economy, i.e. inflation, stock market performance, job opportunities, salary structures, unemployment, business growth, state economic policies, infrastructure, cost of living, interest rates, exchange rates, etc. Such satisfaction levels and expectations will have an effect on economic variables.
- For example, if jobseekers are positive about the economy and have disposable income levels that are perceived as sufficient, they tend to spend more on consumer goods. This, in turn, will drive business dependent on consumer spending and create further economic growth.
- On the other hand, a pessimistic view of the economy would cause jobseekers to rein in their spending, creating a spending recession which could effectively cause business losses and economic downturn.

# Project Background

- Similarly, if employable adults are optimistic about job prospects, opportunities and job security; have healthy salary expectations; and are hopeful about their career growth and development, it will be reflected in their attitudes towards work and the economy as a whole, as well as their spending behaviors.
- Therefore, the following trends in jobseeker and employee expectations could help forecast economic variables.
- This information is useful for professionals, manufacturers/business people, recruitment consultants/agencies, economists, and the general public.

\*Note: the name of the survey was previously Consumer Confidence Index (CCI) and became Jobseeker Confidence index, with few changes to the questionnaire.



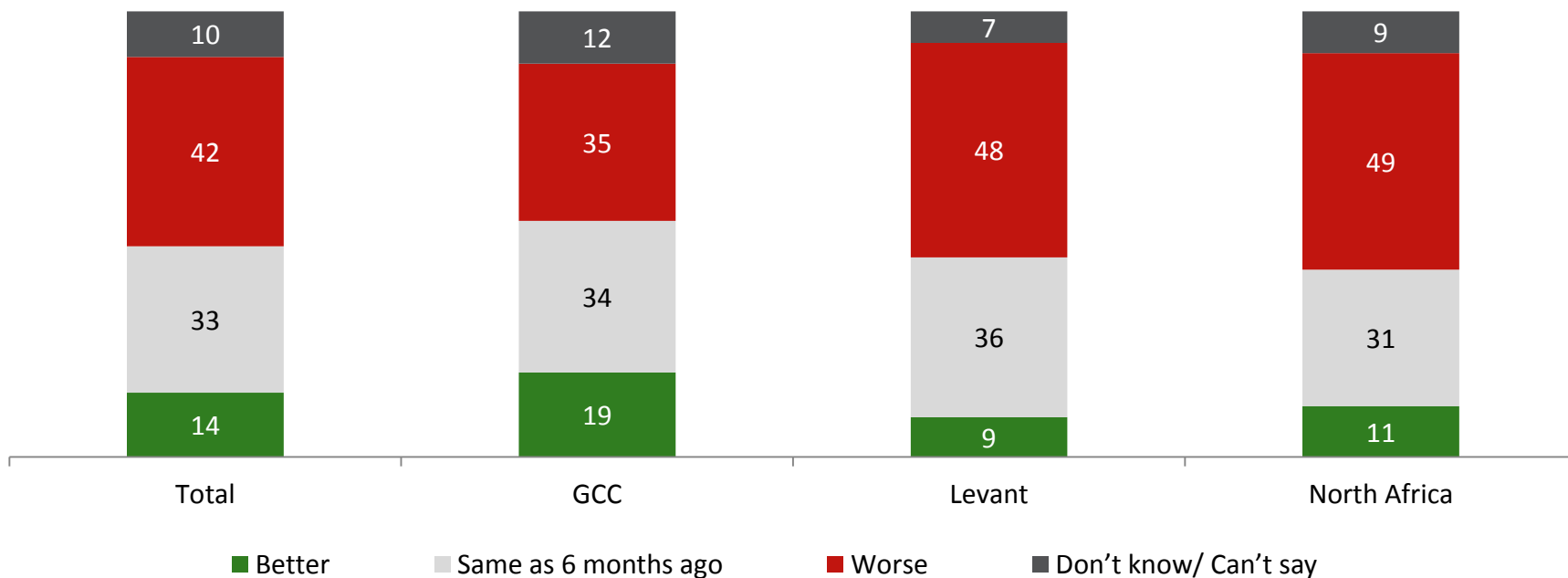
Section 2a

# PERSONAL ECONOMIC SITUATION

# Personal Finance – Evaluation of Current Scenario

- Overall, only 14% believe that their financial condition is better now than it was 6 months ago.
- A significantly higher proportion of GCC residents (19%) believe that their financial condition is better now as compared to respondents in Levant and North Africa (9% and 11%, respectively).

All in %



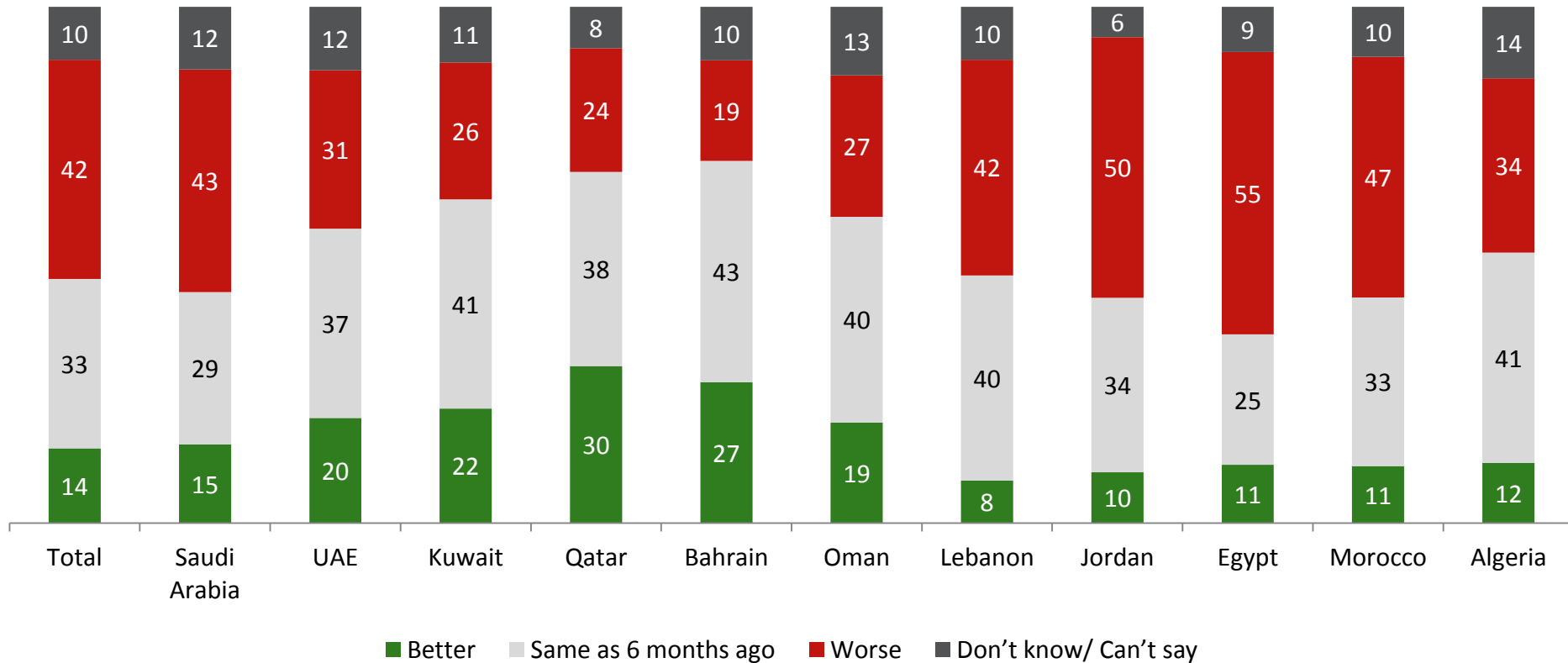
Q. Compared to 6 months ago, my or my family's current financial position is:

Base: Total sample (4224), GCC (1714), Levant (594), North Africa (1634)

# Personal Finance – Evaluation of Current Scenario

- Among GCC residents, Qatar (30%), Bahrain (27%) and Kuwait (22%) consider their financial position to be better.
- 55% of Egyptian residents state that their financial condition is worse now as compared to 6 months ago, the highest amongst any country in the MENA region.

All in %



Q. Compared to 6 months ago, my or my family's current financial position is:

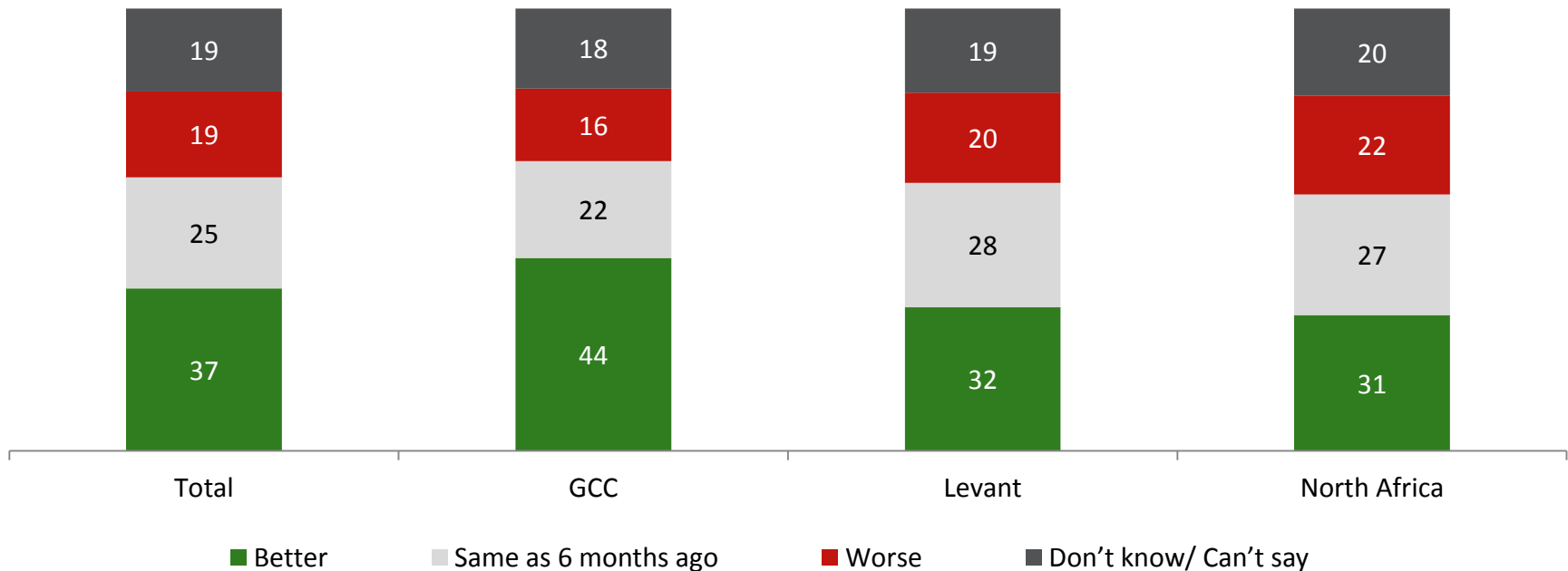
Base: Total (4,224), KSA (865), UAE (349), Kuwait (185), Qatar (125), Bahrain (77), Oman (113), Lebanon (146), Jordan (305), Egypt (870), Morocco (309), Algeria (317)



# Personal Finance – Expectations for the Future

- Overall, close to two-fifths (37%) expect their financial condition to improve in the next 6 months.
- This belief is significantly higher in the GCC (44%) as compared to other MENA regions (Levant: 32%, North Africa: 31%).

All in %



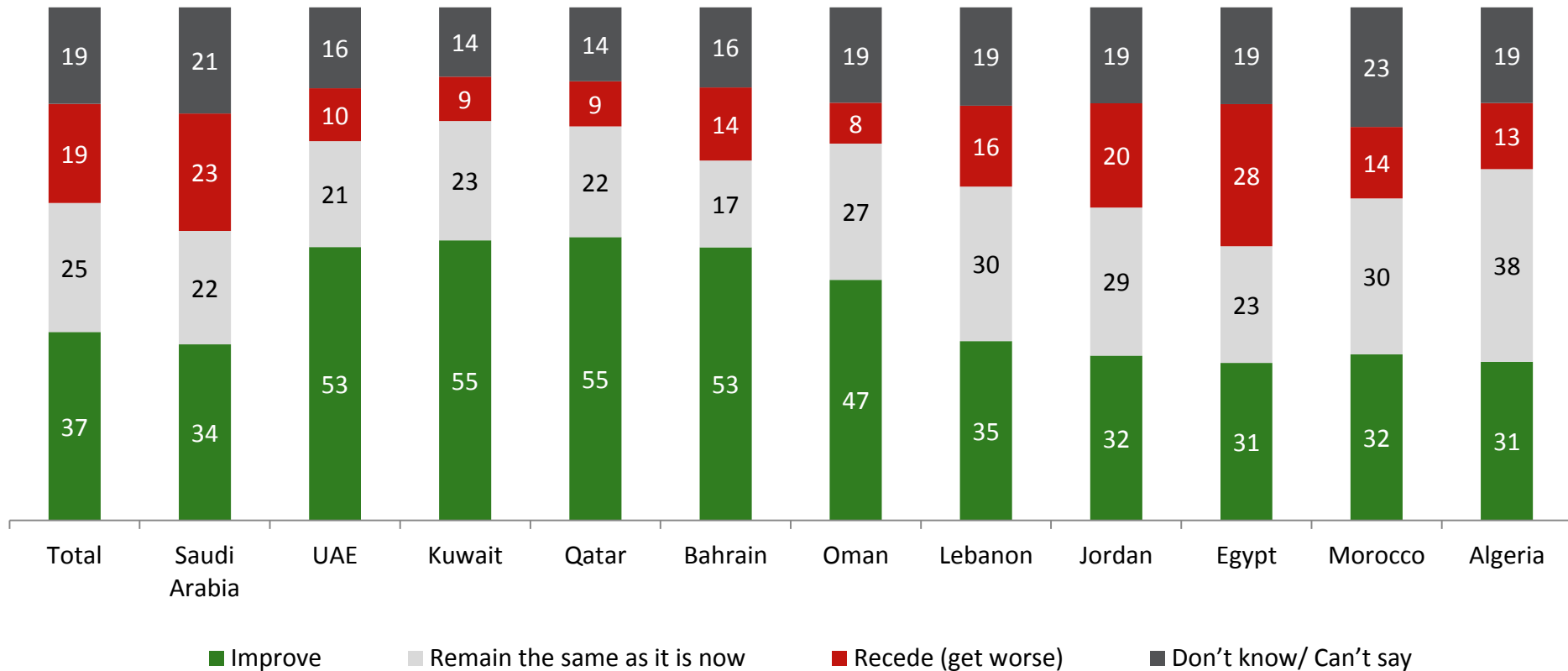
Q. In comparison to the current period, in the next 6 months I expect my or my family's financial position to to:

Base: Total sample (4224), GCC (1714), Levant (594), North Africa (1634)

# Personal Finance – Expectations for the Future

- The GCC countries where this view is higher include Qatar and Kuwait (both at 55%), followed by the UAE and Bahrain (both at 53%).
- Residents of Egypt seem more pessimistic about their future financial position, with 28% expecting it to get worse. This is followed by Saudi Arabia (23%) and Jordan (20%).

All in %



Q. In comparison to the current period, in the next 6 months I expect my or my family's financial position to:

Base: Total (4,224), KSA (865), UAE (349), Kuwait (185), Qatar (125), Bahrain (77), Oman (113), Lebanon (146), Jordan (305), Egypt (870), Morocco (309), Algeria (317)

# Cost of Living

- Majority of respondents (72%) expect the cost of living to increase in the next 6 months.
- This is higher in the Levant (76%) and in North Africa (75%) as compared to the GCC (68%).
- This sentiment is especially high in Egypt (83%), Jordan and Lebanon (both at 78%).

All in %

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Jordan	Egypt	Morocco	Algeria
<b>Base:</b>	<b>4,224</b>	<b>865</b>	<b>349</b>	<b>185</b>	<b>125</b>	<b>77</b>	<b>113</b>	<b>146</b>	<b>305</b>	<b>870</b>	<b>309</b>	<b>317</b>
Cost of living to increase	72	73	59	74	56	71	64	78	78	83	61	63
Cost of living to remain the same	13	12	18	15	22	12	18	11	13	7	21	17
Cost of living to decrease	6	6	9	6	11	4	8	4	3	4	5	7
Don't know / can't say	9	9	14	6	11	13	11	7	6	6	13	12

Q. In the next 6 months, I expect ...

# Change in Savings

- Three-fifths of respondents (60%) believe that their savings have decreased in comparison to last year, while only 15% believe the opposite.
- A lower proportion of CGG residents (53%) claim that, as compared to Levant and North Africa residents (67% and 64% respectively).
- A higher percentage of residents in Egypt and Jordan (both at 68%) believe that their savings have decreased.

All in %

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Jordan	Egypt	Morocco	Algeria
<b>Base:</b>	<b>4,224</b>	<b>865</b>	<b>349</b>	<b>185</b>	<b>125</b>	<b>77</b>	<b>113</b>	<b>146</b>	<b>305</b>	<b>870</b>	<b>309</b>	<b>317</b>
Increased	15	15	19	25	25	21	20	15	10	13	11	10
Remained the same	19	17	24	24	27	31	27	13	18	15	23	25
Decreased	60	61	48	44	40	43	44	64	68	68	59	57
Don't know / Can't say	2	2	9	5	6	4	4	5	-	1	1	-

Q. In comparison to last year, my savings have:

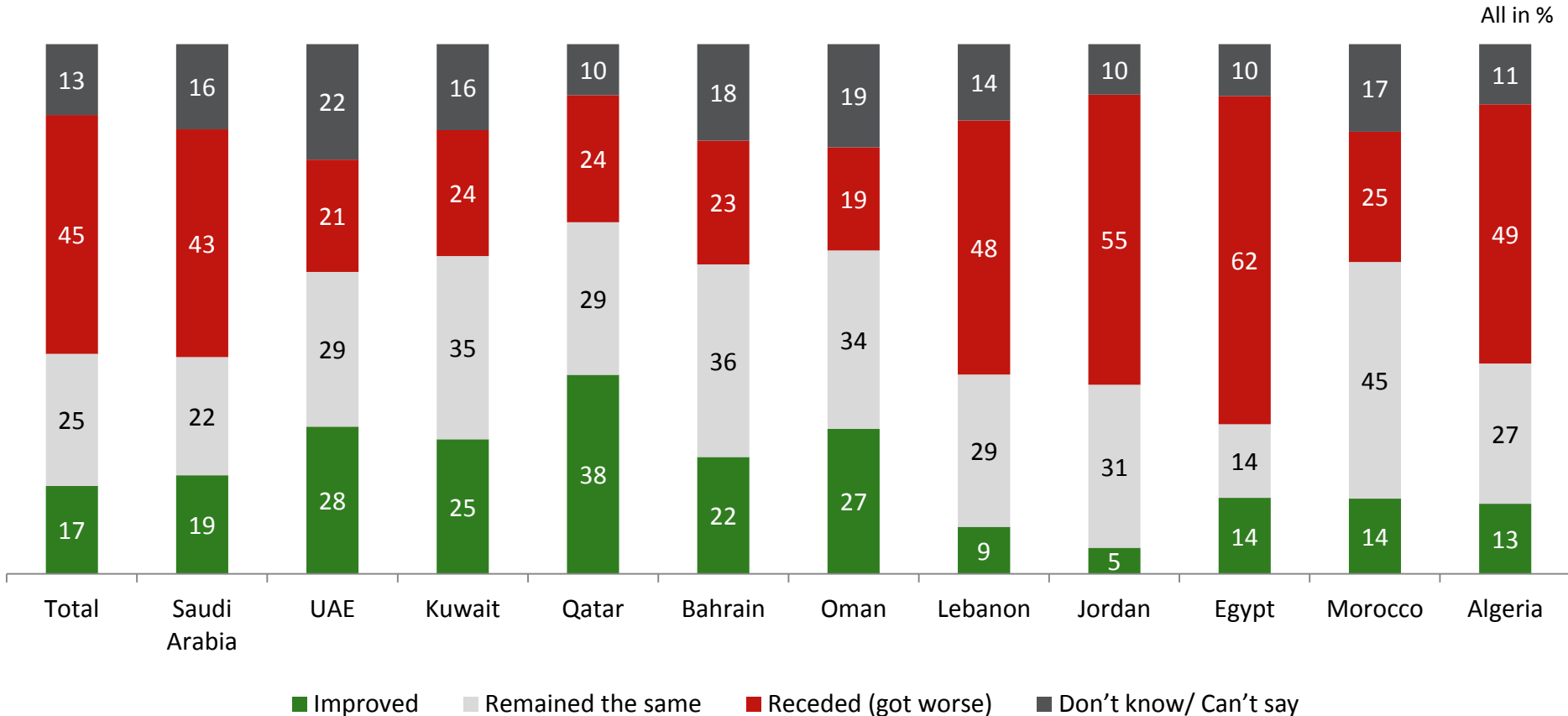


Section 2b

# COUNTRY'S ECONOMIC SITUATION

# Country's Economy – Evaluation of Current Scenario

- 45% of respondents believe that their country's economy has gotten worse compared to 6 months earlier, while only 17% believe the opposite. Those from North Africa and the Levant are more negative about their country's economy, with 54% and 53% respectively stating that it has receded (GCC: 33%).
- A significantly higher proportion of respondents from Egypt (62%) followed by Jordan residents (55%) believe that their country's economy has gotten worse.



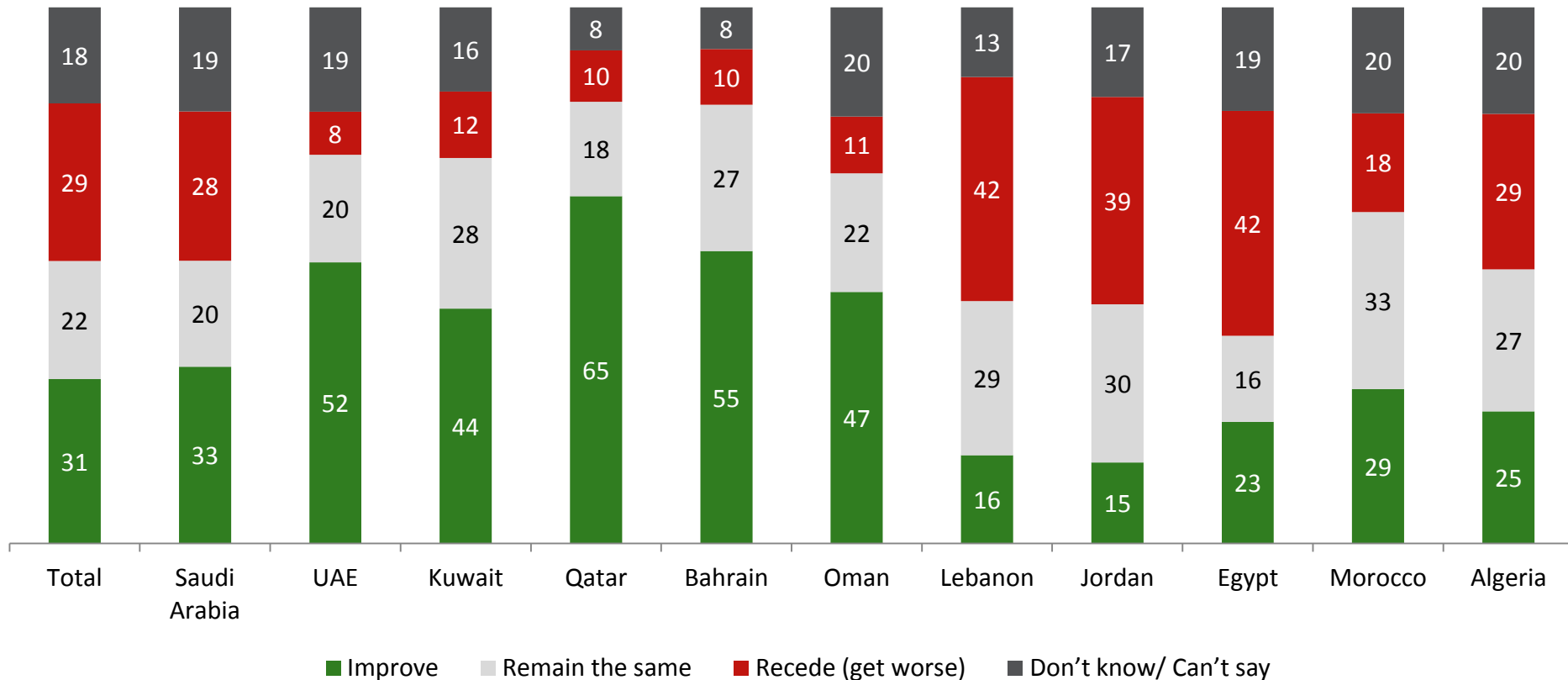
Q. Compared to 6 months earlier, my country's economy has:

Base: Total (4,224), KSA (865), UAE (349), Kuwait (185), Qatar (125), Bahrain (77), Oman (113), Lebanon (146), Jordan (305), Egypt (870), Morocco (309), Algeria (317)

# Country's Economy – Expectations for the Future

- Almost a third (31%) of respondents expect the economy in their country of residence to improve in the next 6 months, while 29% expect the opposite.
- Those living in the GCC and especially residents of Qatar (65%) and Bahrain (55%) are more optimistic about their country's future economy (GCC: 42%) as compared to those living in the Levant (15%) and in North Africa (24%).

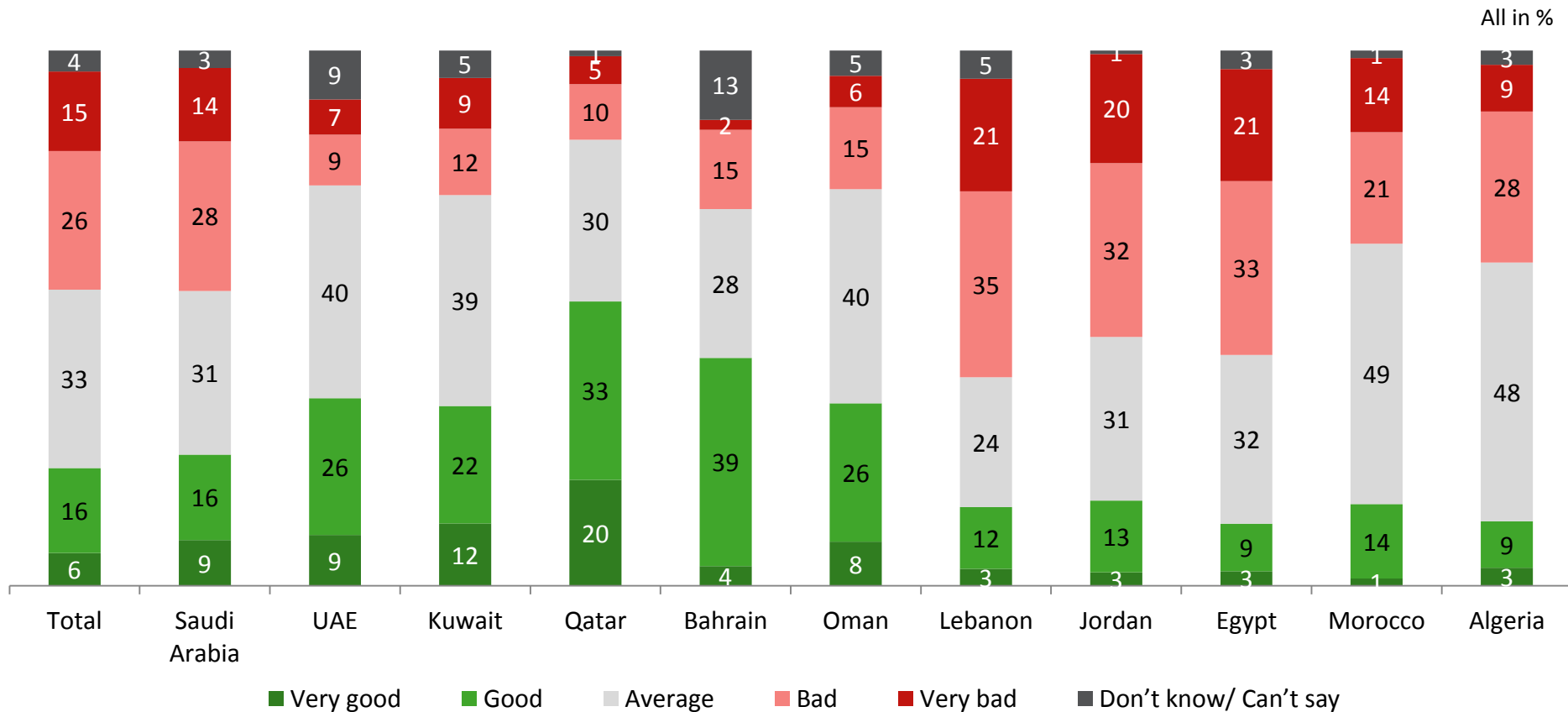
All in %



Q. In comparison to the current period, in the next 6 months I expect my country's economy to:  
 Base: Total (4,224), KSA (865), UAE (349), Kuwait (185), Qatar (125), Bahrain (77), Oman (113), Lebanon (146), Jordan (305), Egypt (870), Morocco (309), Algeria (317)

# Present Business Conditions

- 22% of respondents are positive about the current business conditions. Perception is more positive among GCC residents (very good/ good: 32%) in comparison to respondents from the Levant and North Africa (very good/ good: 13% and 11%, respectively).
- Residents in Lebanon (bad/ very bad: 56%), Jordan and Egypt (both having bad/ very bad: 53%) seem more pessimistic.



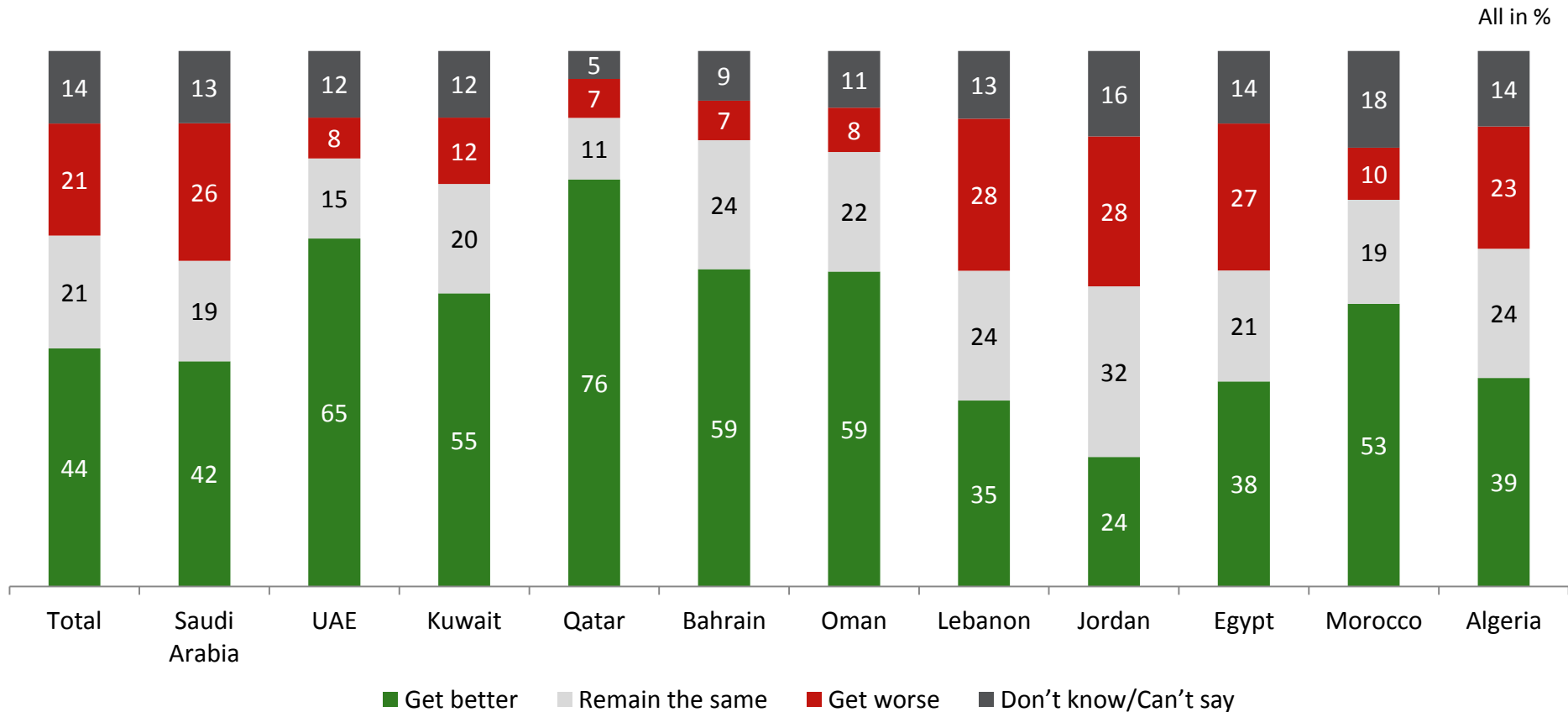
Q. Overall, presently business conditions in my country of residence are...

Base: Those employed (2466), KSA (490), UAE (274), Kuwait (137), Qatar (96), Bahrain (54), Oman (85), Lebanon (95), Jordan (157), Egypt (517), Morocco (72), Algeria (149)



# Expectations of Future Business Conditions

- Overall, 44% of MENA residents expect the business conditions to get better within the next year.
- GCC residents and especially those living in the Qatar (76%) and in the UAE (65%), are more optimistic about the future business conditions in their country of residence (GCC: 54%, Levant 28%, North Africa: 39%).



Q. In a year's time, I expect the business conditions to:

Base: Those employed (2466), KSA (490), UAE (274), Kuwait (137), Qatar (96), Bahrain (54), Oman (85), Lebanon (95), Jordan (157), Egypt (517), Morocco (72), Algeria (149)

# Current Availability of Jobs

- 38% believe that there are few jobs available across few industries, while 20% state that there are few jobs available across various industries.

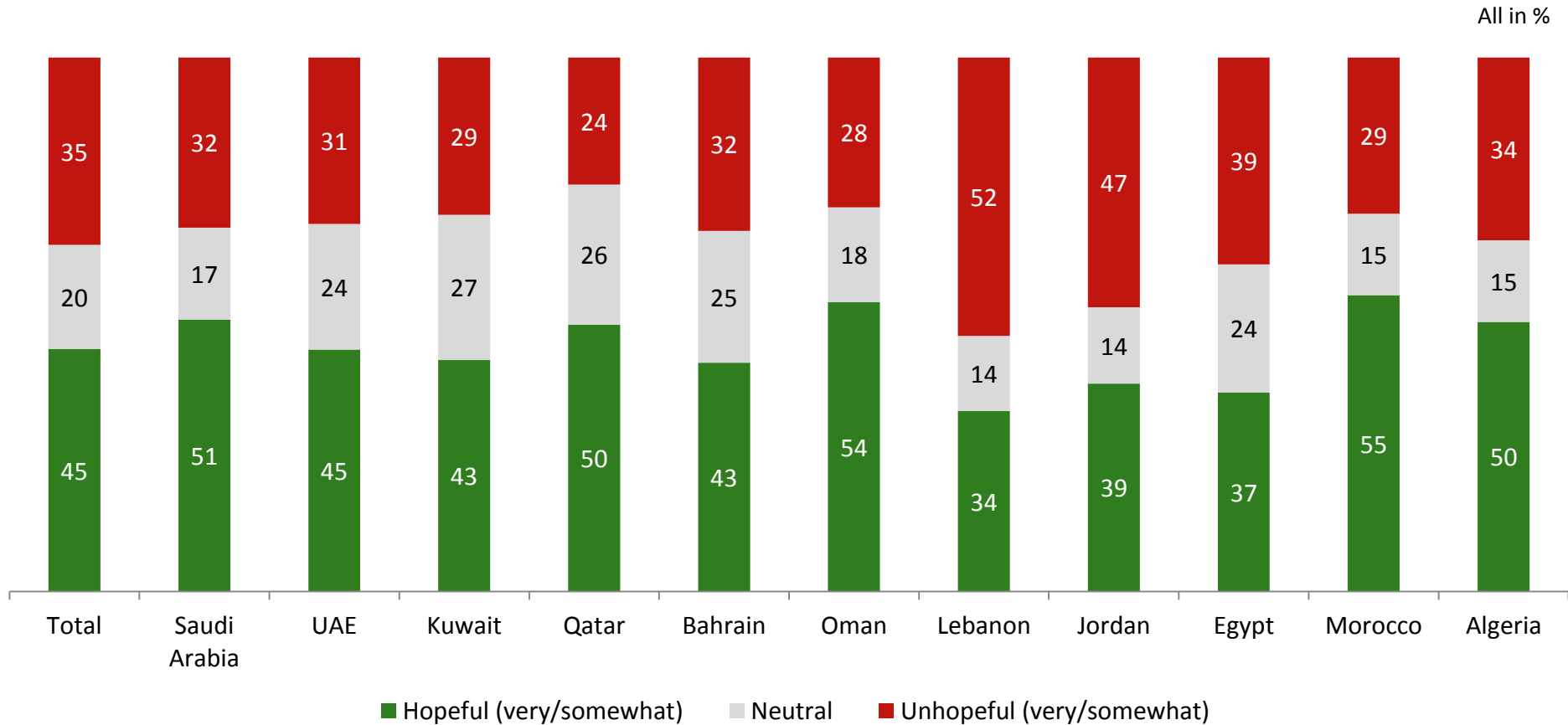
All in %

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Jordan	Egypt	Morocco	Algeria
<b>Base</b>	<b>4,224</b>	<b>865</b>	<b>349</b>	<b>185</b>	<b>125</b>	<b>77</b>	<b>113</b>	<b>146</b>	<b>305</b>	<b>870</b>	<b>309</b>	<b>317</b>
There are few jobs available across few industries	38	37	20	23	18	18	34	44	49	40	41	40
There are few jobs available across various industries	20	21	19	19	12	22	15	22	25	20	23	25
There are plenty of jobs available but across a few industries only	14	13	18	18	24	14	19	11	10	17	13	12
There are plenty of jobs available across various industries	12	14	25	23	30	19	15	8	6	8	6	8
Don't know/ Can't say	16	15	18	16	15	26	17	16	10	15	17	15

Q. Which of the following best describes your opinion on the current availability of jobs in your country of residence:

# Expectations to find ideal job in the Future

- 45% of respondents are hopeful to find their ideal job in the next 6 months, while 35% of respondents are pessimistic about it.



Q. How hopeful are you that you will find your ideal job in the next 6 months..?

Base: Total (4,086), KSA (835), UAE (340), Kuwait (180), Qatar (122), Bahrain (77), Oman (107), Lebanon (142), Jordan (293), Egypt (842), Morocco (301), Algeria (307)

# Future Availability of Jobs

- 28% of respondents expect the number of jobs available in the next 6 months to decrease while another 26% expect them to increase and 29% expect it to remain the same.
- GCC residents are more optimistic and expect the jobs available to increase (34%) while Levant residents expect them to decrease (40%).

All in %

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Jordan	Egypt	Morocco	Algeria
Base:	4,224	865	349	185	125	77	113	146	305	870	309	317
Increase	26	30	40	34	46	36	38	13	13	21	27	23
Remain the same	29	24	23	28	23	25	23	26	36	33	33	32
Decrease	28	33	14	17	16	21	23	43	39	31	17	25
Don't know/Can't say	17	13	23	22	14	18	16	18	12	15	24	20

Q. In the next 6 months, the number of jobs available in my country will....

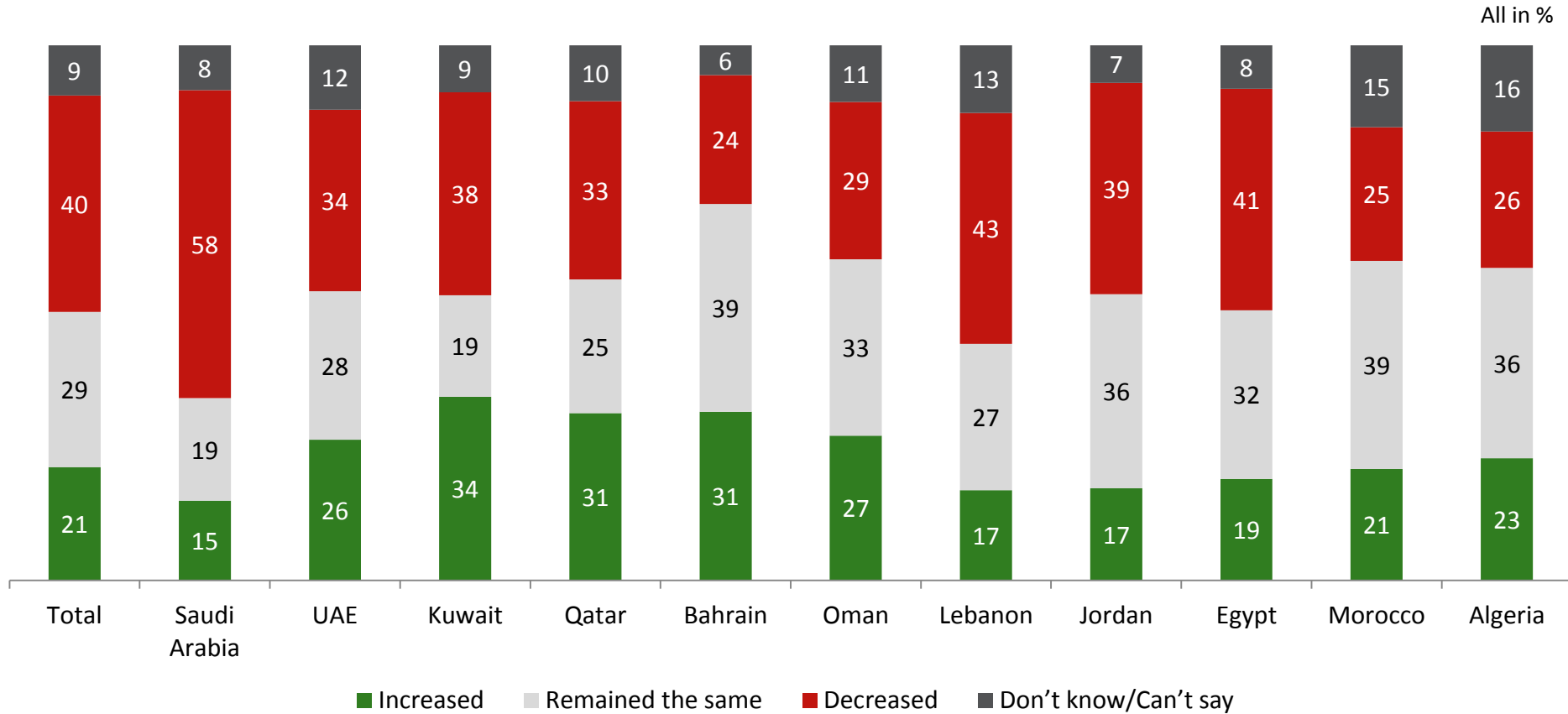


Section 2c

# CURRENT JOB

# Change in Number of Employees

- 40% of respondents state that the number of employees in their company has decreased in comparison to 6 months ago, while 21% believe that it has increased.
- A somewhat higher proportion of GCC residents (23%) claim that this number has increased as compared to Levant (17%) and North Africa (20%). This is mainly due to Kuwait (34%).

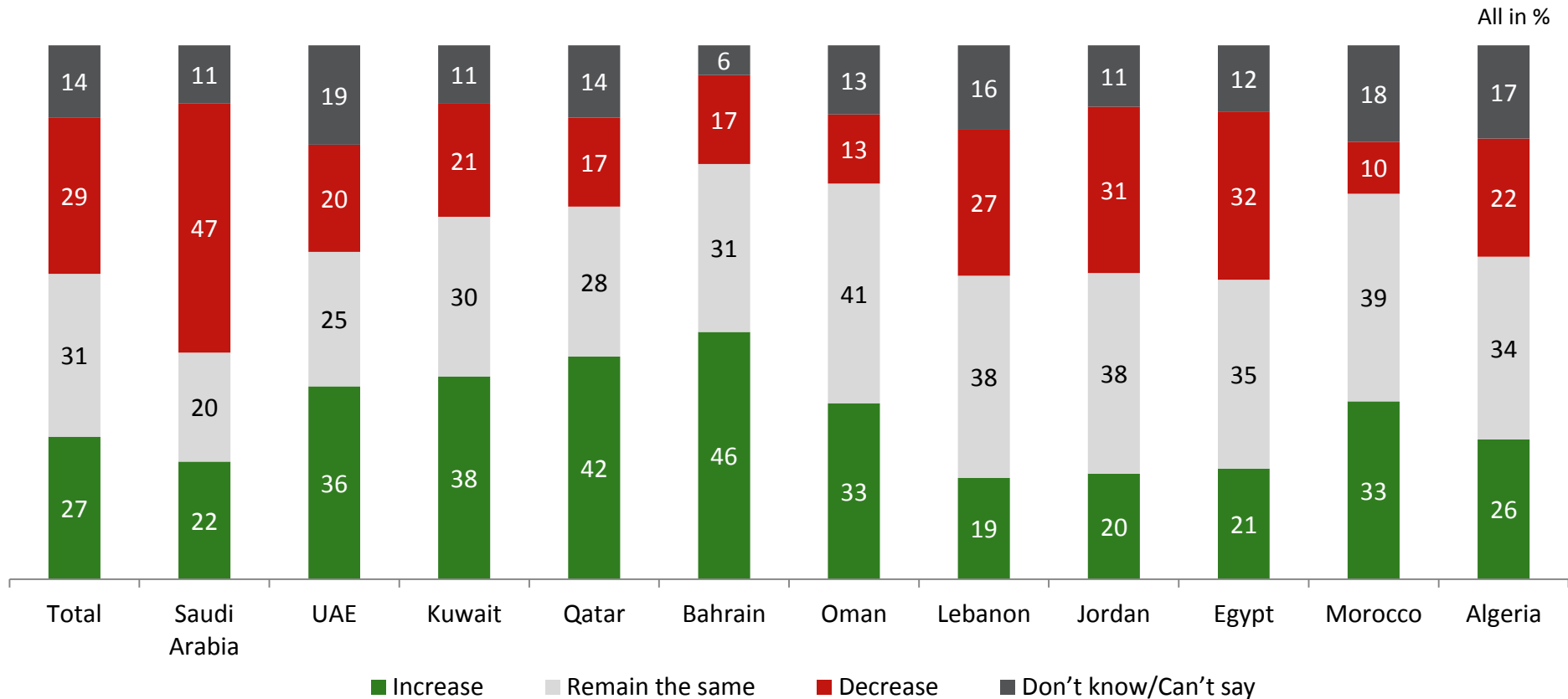


Q. In comparison to 6 months ago, the number of employees in the organization where I work has:

Base: Those employed (2466), KSA (490), UAE (274), Kuwait (137), Qatar (96), Bahrain (54), Oman (85), Lebanon (95), Jordan (157), Egypt (517), Morocco (72), Algeria (149)

# Expected Change in Number of Employees

- 29% of respondents expect the number of employees in their company to decrease in the next 6 months, while about the same proportion (27%) expect the opposite.
- GCC residents are significantly more optimistic (31%) in comparison to Levant (20%) and North Africa (22%).
- Those living in the Bahrain (46%) are the most positive, followed by Qatar residents (42%).



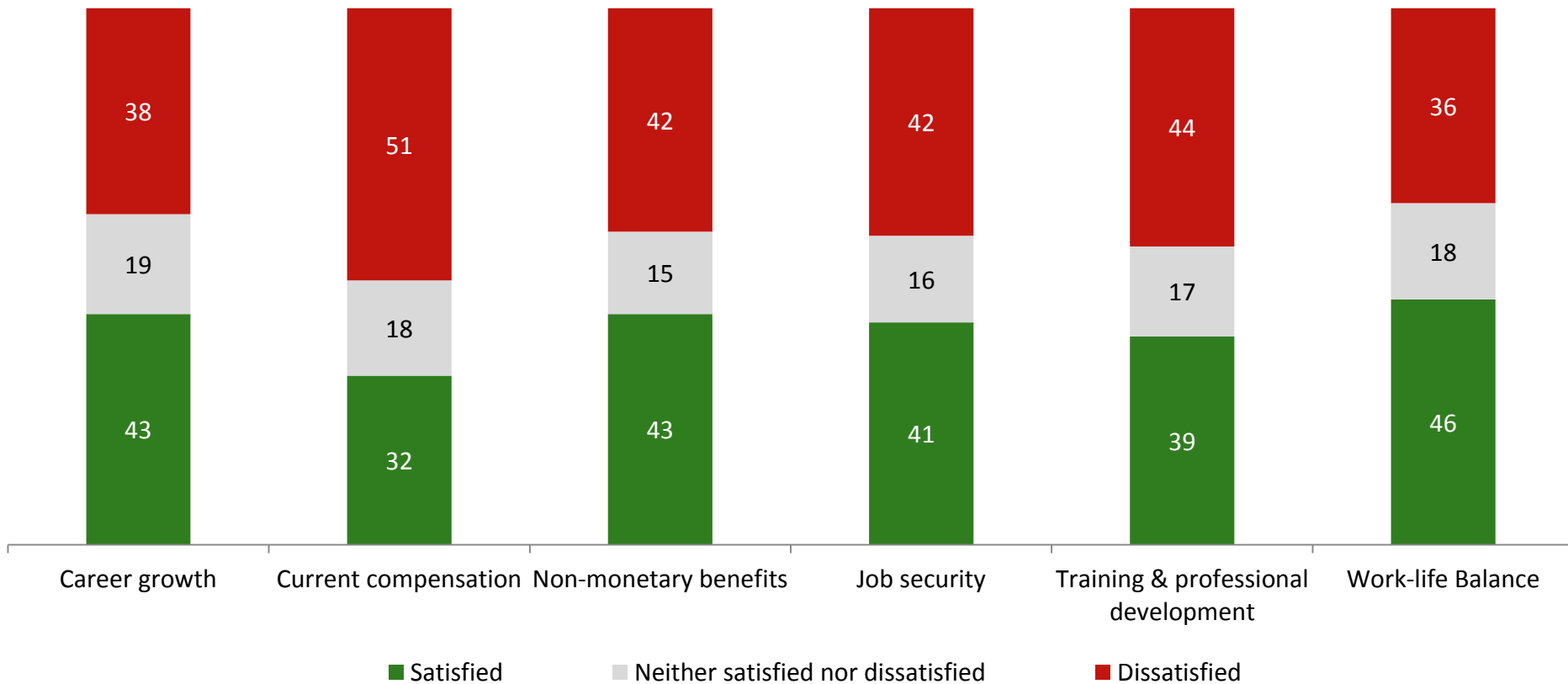
Q. In the next 6 months, I expect the number of employees in my organization to:

Base: Those employed (2466), KSA (490), UAE (274), Kuwait (137), Qatar (96), Bahrain (54), Oman (85), Lebanon (95), Jordan (157), Egypt (517), Morocco (72), Algeria (149)

# Satisfaction levels – Job Attributes

- Generally, respondents are satisfied with the work-life balance (46%), non-monetary benefits and career growth (both at 43%). However, slightly over half of respondents are dissatisfied with their current compensation (51%).

All in %



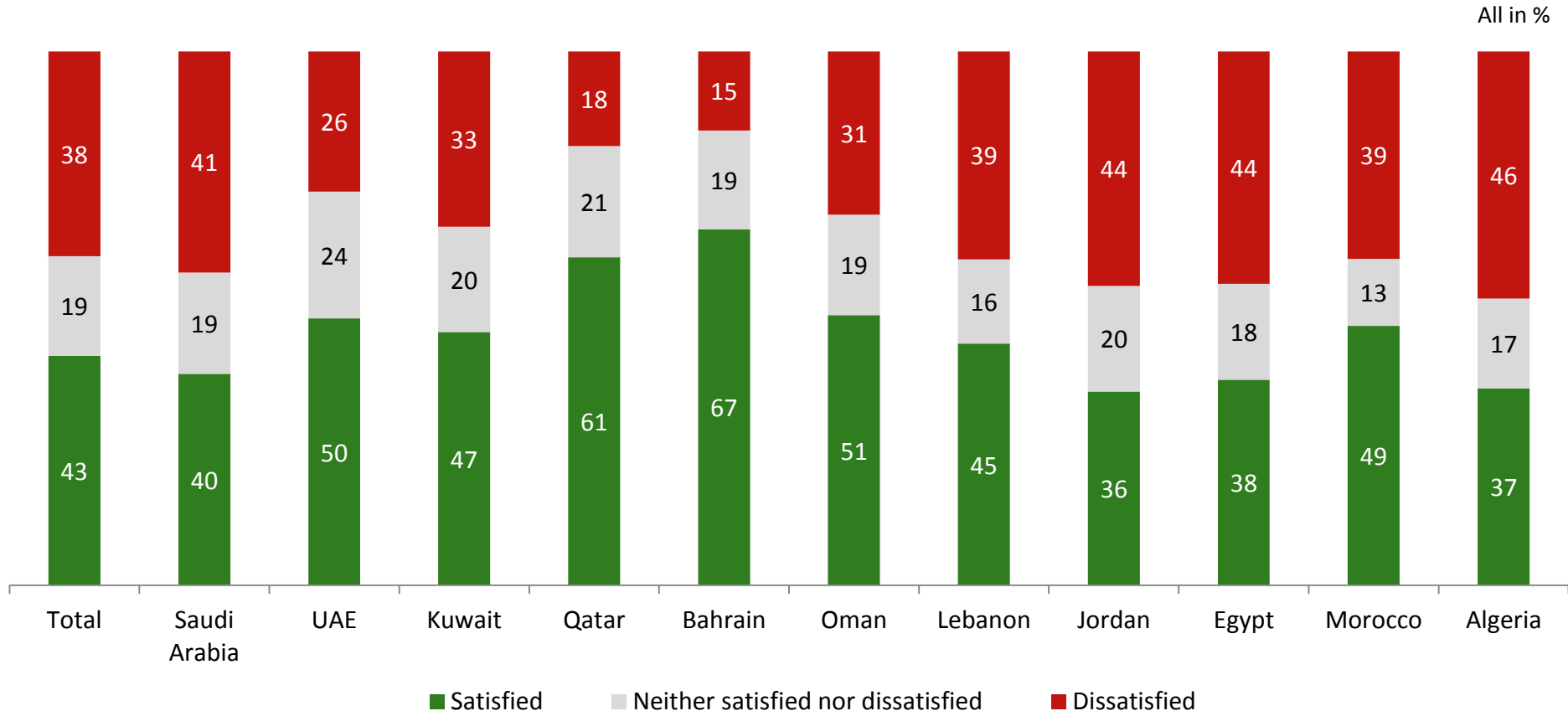
Q. On an overall level, how satisfied are you with the following attributes related to your job?

Base: Those employed (2466), KSA (490), UAE (274), Kuwait (137), Qatar (96), Bahrain (54), Oman (85), Lebanon (95), Jordan (157), Egypt (517), Morocco (72), Algeria (149)



# Satisfaction Levels: Career Growth Opportunities

- 43% claim that they are satisfied with the career growth opportunities in their current job, while 38% state the opposite. Overall, GCC residents are more satisfied (47%) compared to Levant (37%) and North Africa (38%).
- Residents of Algeria (46%), Egypt and Jordan (both at 44%) seem the least satisfied in this aspect.



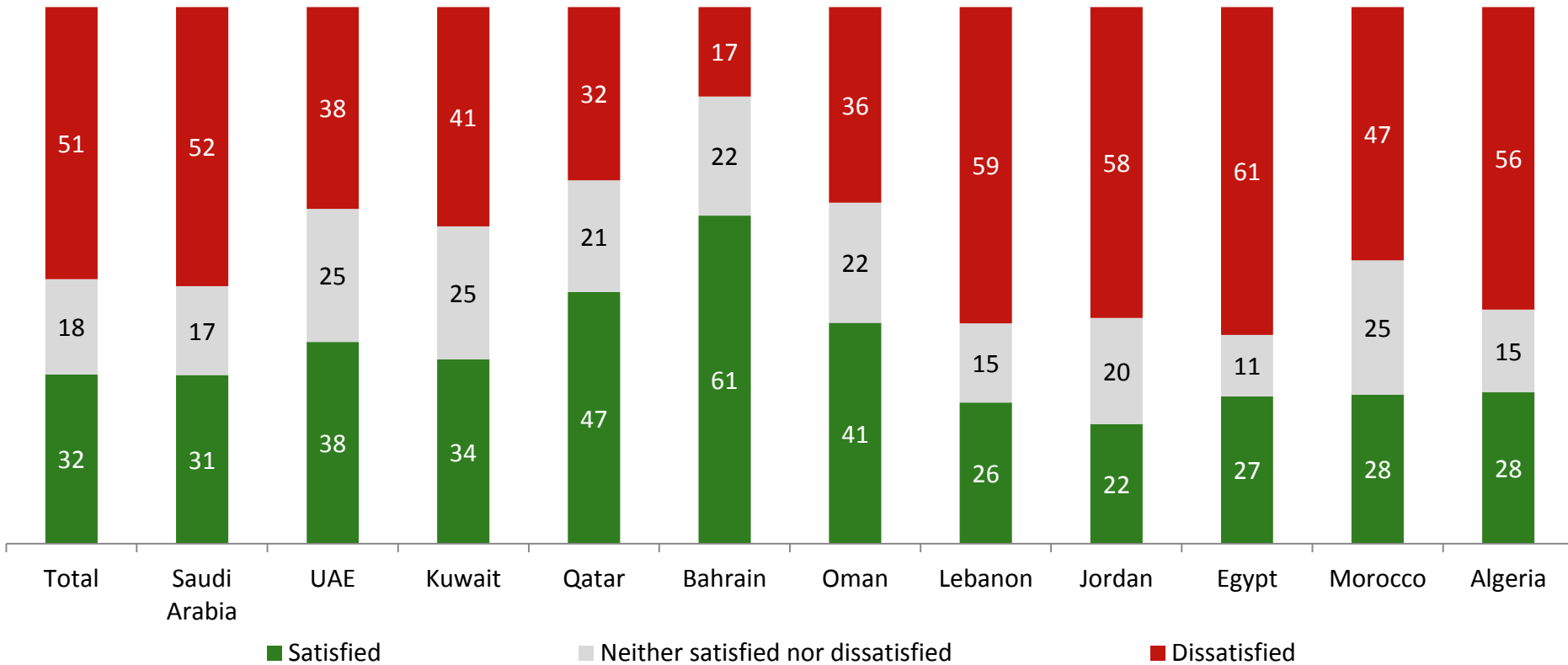
Q. On an overall level, how satisfied are you with the following attributes related to your job?

Base: Those employed (2466), KSA (490), UAE (274), Kuwait (137), Qatar (96), Bahrain (54), Oman (85), Lebanon (95), Jordan (157), Egypt (517), Morocco (72), Algeria (149)

# ^ Satisfaction Levels: Current Compensation (Salary & Allowances)

- Slightly over half (51%) of employed respondents are dissatisfied with their current compensation.
- Dissatisfaction levels tend to be higher amongst residents of Levant and North Africa (both at 59% vs. 43% in GCC).
- Residents of Bahrain (61%) are satisfied whereas residents of Egypt (61%) and Lebanon (59%) are dissatisfied.

All in %



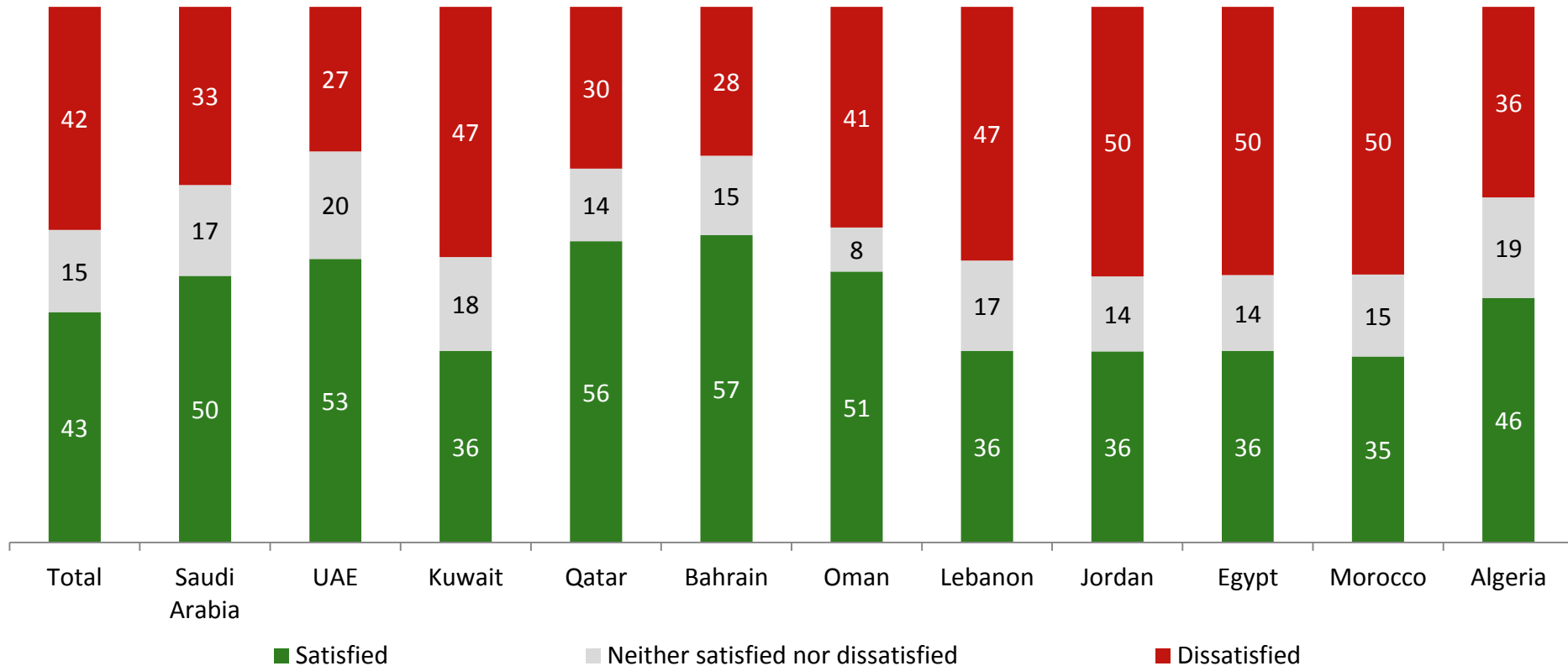
Q. On an overall level, how satisfied are you with the following attributes related to your job?

Base: Those employed (2466), KSA (490), UAE (274), Kuwait (137), Qatar (96), Bahrain (54), Oman (85), Lebanon (95), Jordan (157), Egypt (517), Morocco (72), Algeria (149)

# Satisfaction Levels: Non-monetary Benefits

- When it comes to the non-monetary benefits employed respondents receive at their current job, 43% are satisfied while 42% claim to be unsatisfied in this aspect.
- GCC residents present higher satisfaction levels (50% vs. 34% in Levant and 36% in North Africa).
- Bahrain residents seem to be satisfied (57%) while Morocco, Egypt and Jordan residents (all 50%) are dissatisfied.

All in %

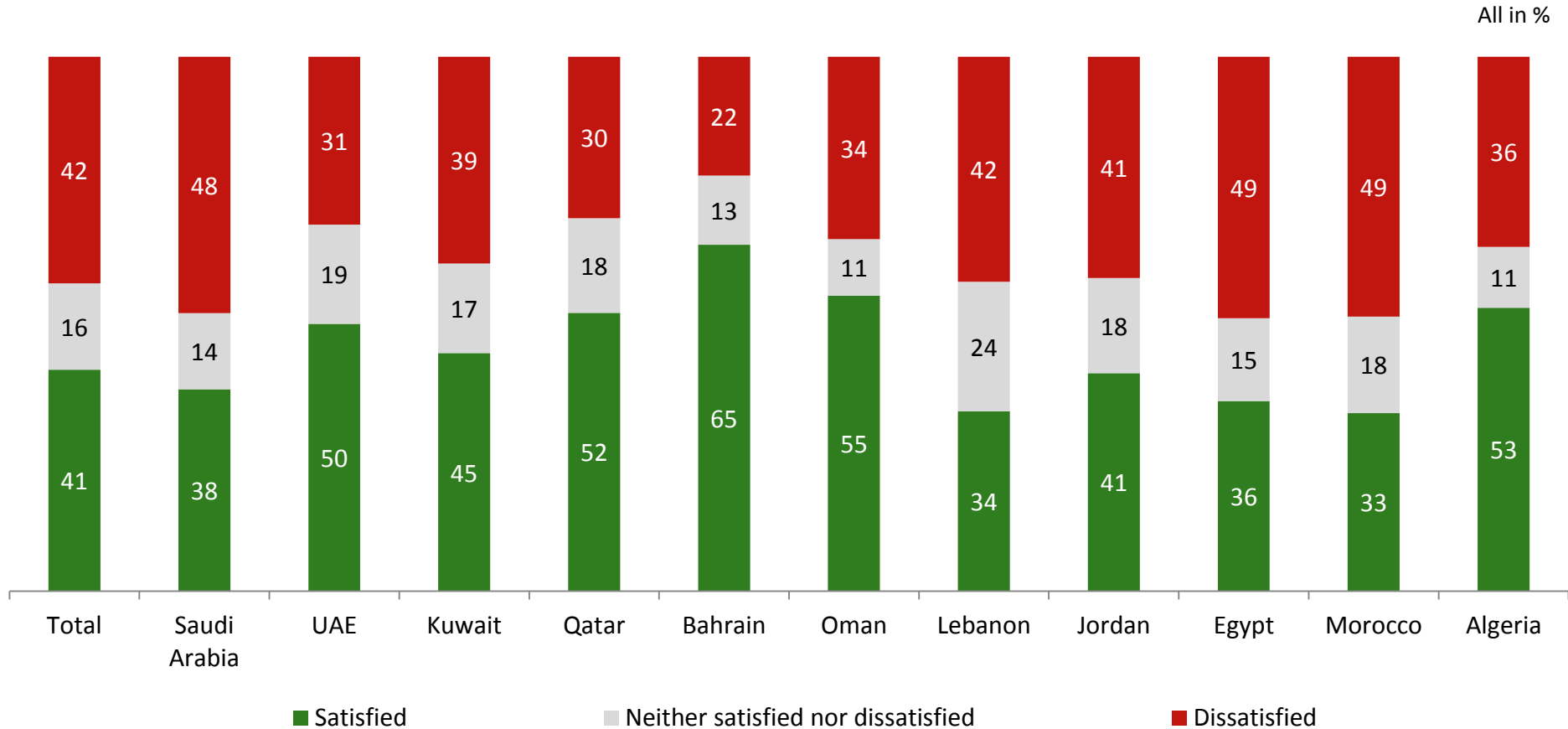


Q. On an overall level, how satisfied are you with the following attributes related to your job?

Base: Those employed (2466), KSA (490), UAE (274), Kuwait (137), Qatar (96), Bahrain (54), Oman (85), Lebanon (95), Jordan (157), Egypt (517), Morocco (72), Algeria (149)

# Satisfaction Levels: Job Security

- 41% are satisfied with the job security in their current organization, while 42% claim to be unsatisfied.
- Residents of Bahrain (65%) and Oman (55%) are highly satisfied whereas residents of Egypt and Morocco (both at 49%) and those in Saudi Arabia (48%) are dissatisfied.

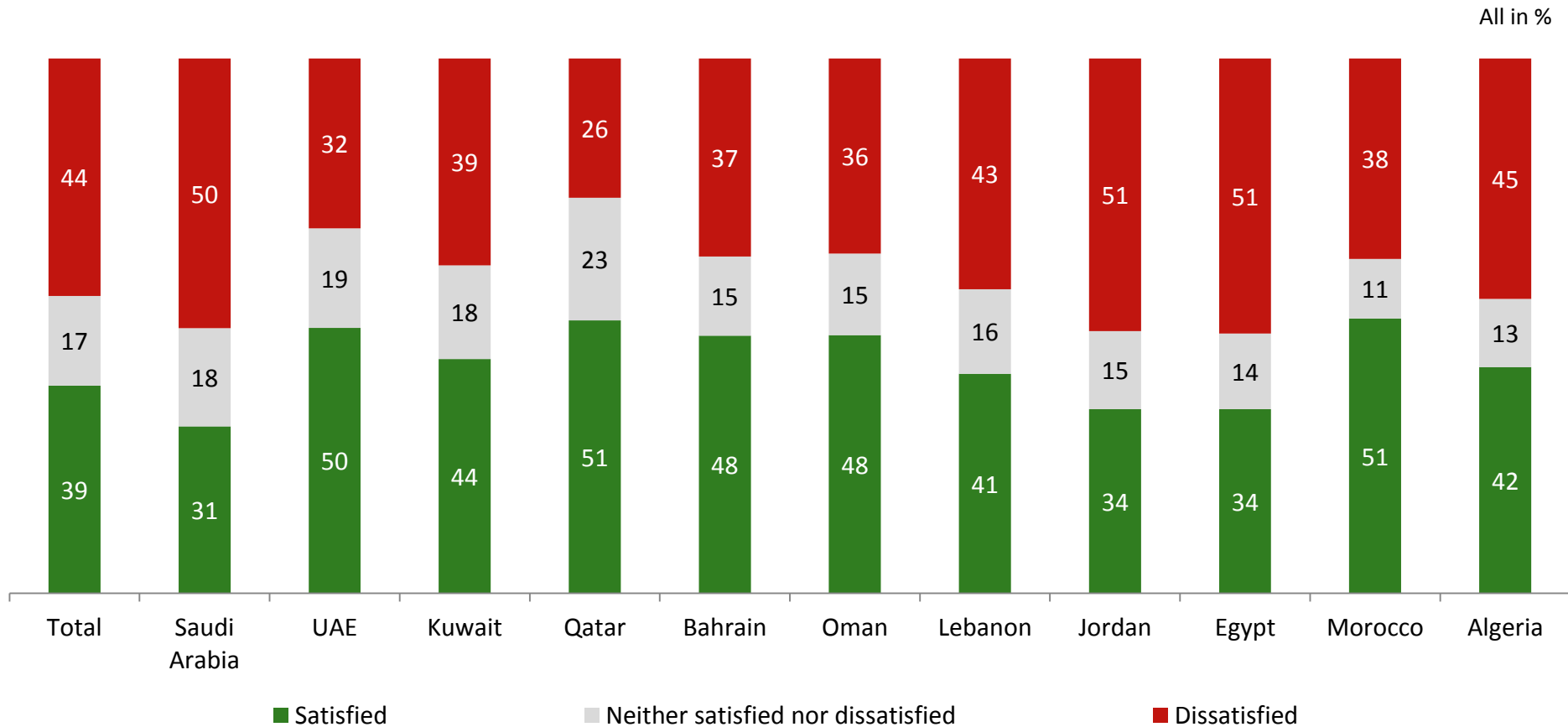


Q. On an overall level, how satisfied are you with the following attributes related to your job?

Base: Those employed (2466), KSA (490), UAE (274), Kuwait (137), Qatar (96), Bahrain (54), Oman (85), Lebanon (95), Jordan (157), Egypt (517), Morocco (72), Algeria (149)

# Satisfaction Levels: Training & professional development

- 44% of respondents claim to be unsatisfied with the training and professional development, while 39% are satisfied.
- Residents of Qatar and Morocco (both at 51%) are highly satisfied whereas residents of Egypt and Jordan (both at 51%) and those in Saudi Arabia (50%) are dissatisfied.

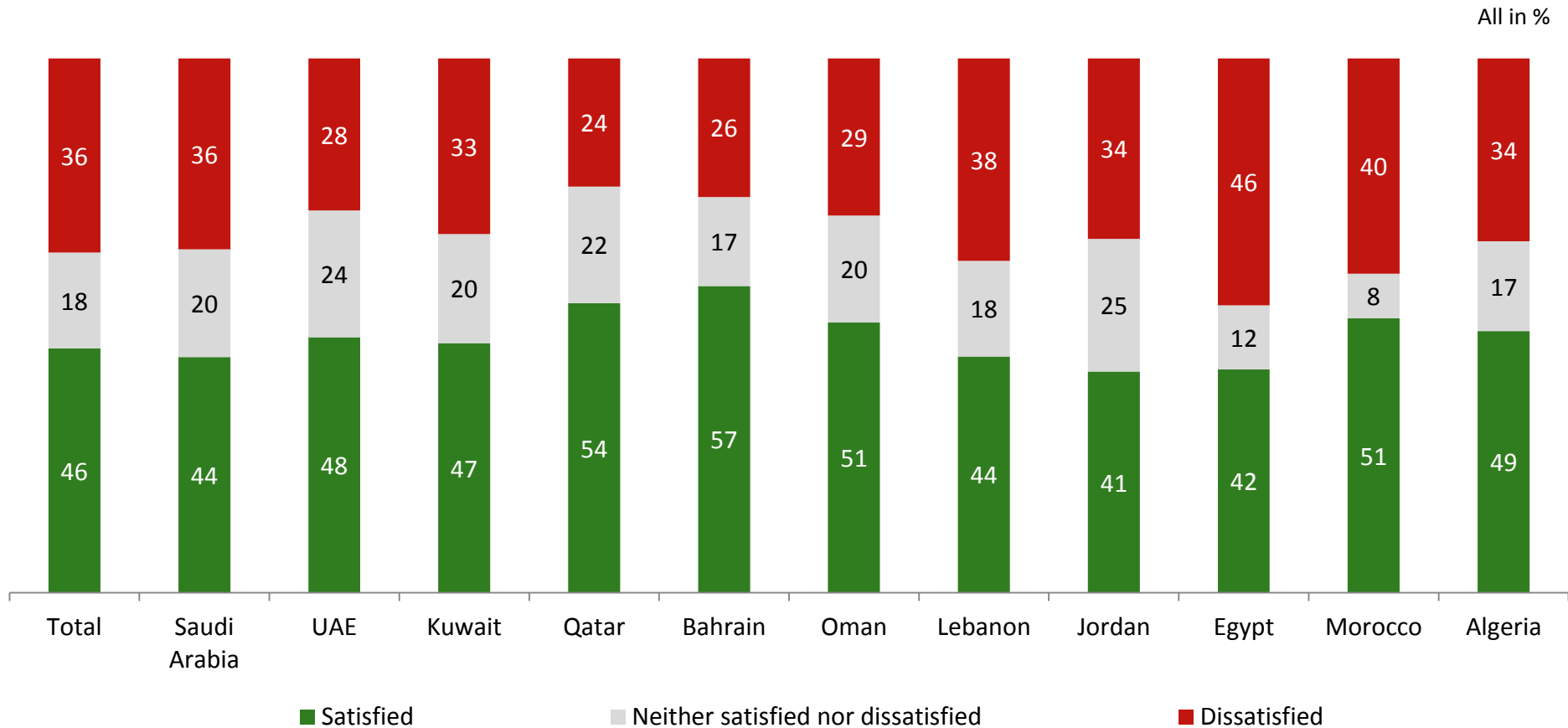


Q. On an overall level, how satisfied are you with the following attributes related to your job?

Base: Those employed (2466), KSA (490), UAE (274), Kuwait (137), Qatar (96), Bahrain (54), Oman (85), Lebanon (95), Jordan (157), Egypt (517), Morocco (72), Algeria (149)

# Satisfaction Levels: Work-life Balance

- 46% are satisfied with the work-life balance in their current organization, while 36% claim to be unsatisfied.
- Residents of Bahrain (57%) and Qatar (54%) are highly satisfied whereas residents of Egypt (46%) are dissatisfied.



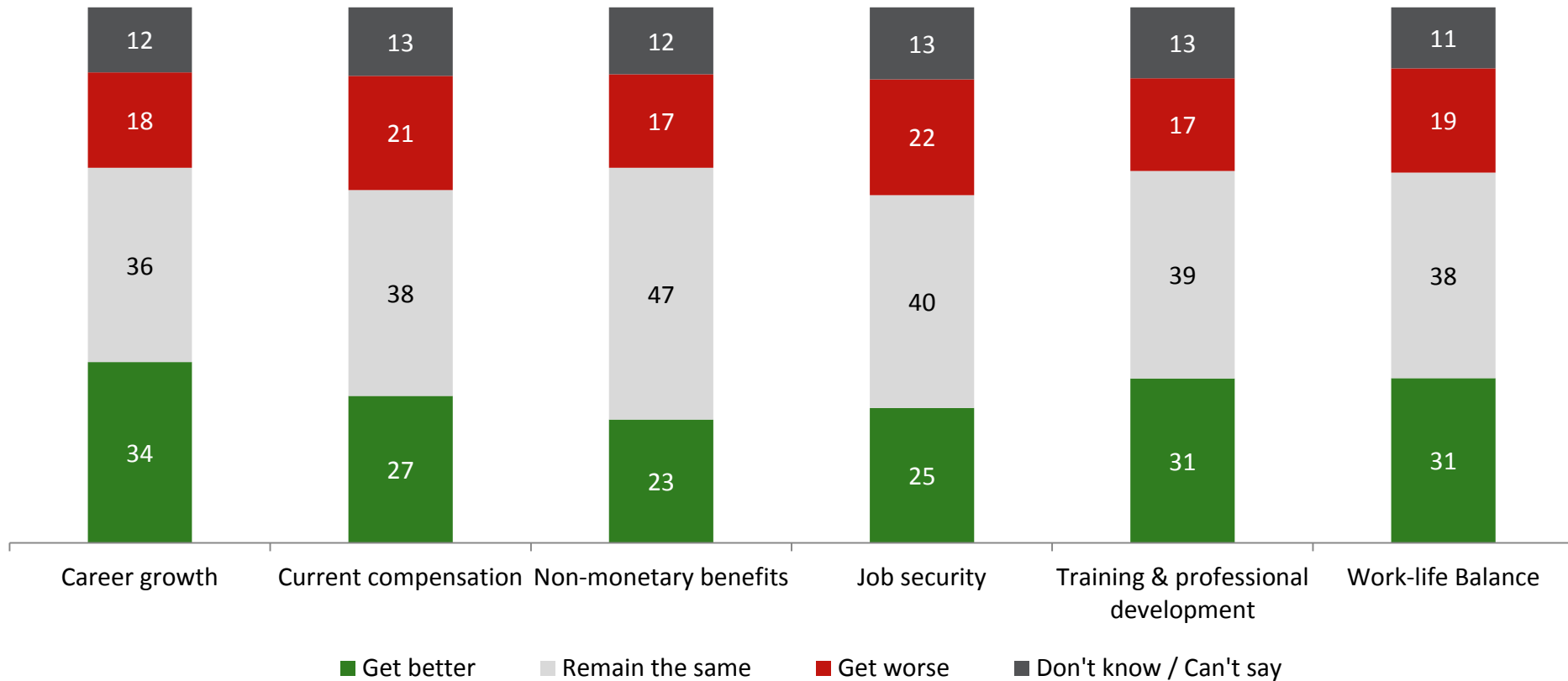
Q. On an overall level, how satisfied are you with the following attributes related to your job?

Base: Those employed (2466), KSA (490), UAE (274), Kuwait (137), Qatar (96), Bahrain (54), Oman (85), Lebanon (95), Jordan (157), Egypt (517), Morocco (72), Algeria (149)

# Expected change in job attributes

- Generally, respondents expect their job attributes to improve over the next 6 months, especially with regards to career growth (34%), training and professional development and work-life balance (both at 31%).

All in %



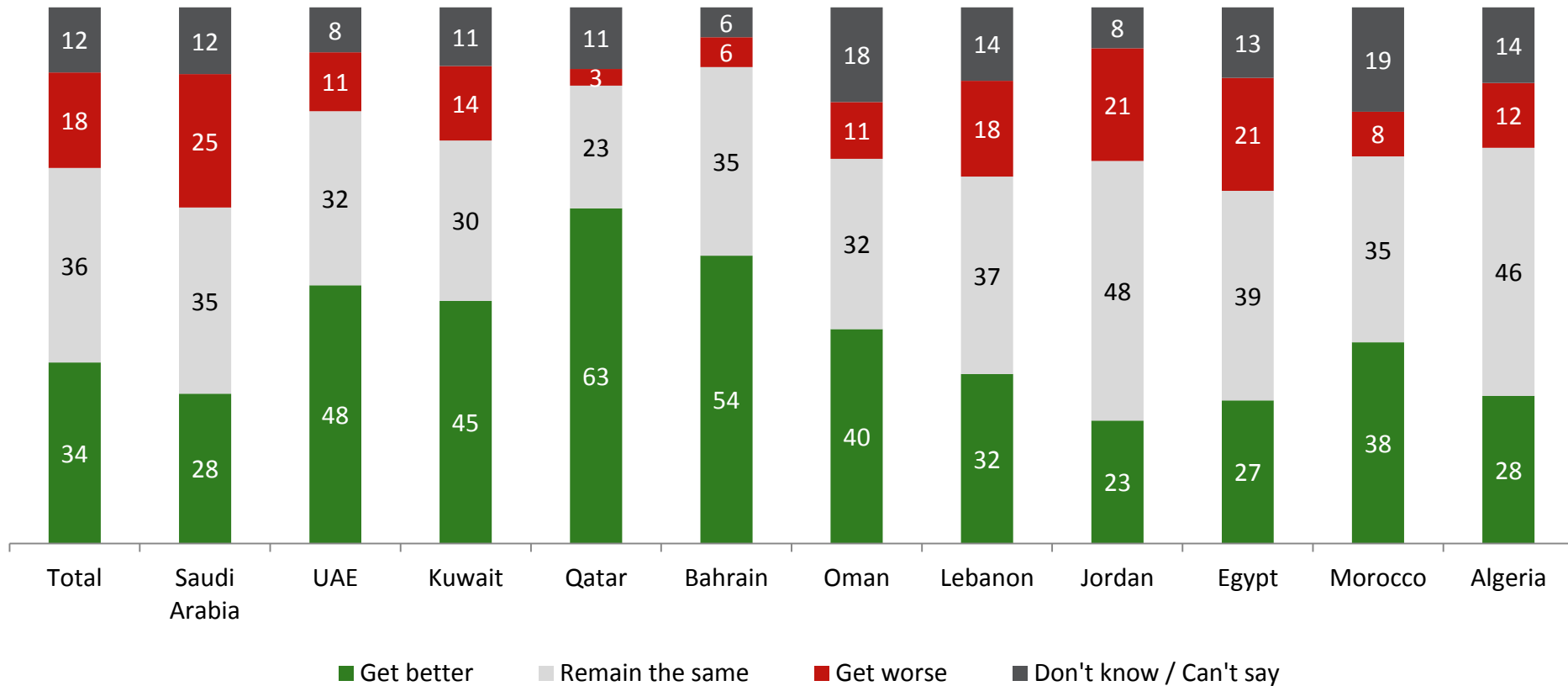
Q. How do you expect these job attributes to change over the next 6 month?

Base: Those employed (2466), KSA (490), UAE (274), Kuwait (137), Qatar (96), Bahrain (54), Oman (85), Lebanon (95), Jordan (157), Egypt (517), Morocco (72), Algeria (149)

# Expected change in job attributes: Career growth opportunities

- Slightly over a third (34%) expect the career growth opportunities to get better in the next 6 months.
- GCC residents expect a positive change (40%), highest being among residents of Qatar (63%) and Bahrain (54%).

All in %



Q. How do you expect these job attributes to change over the next 6 month?

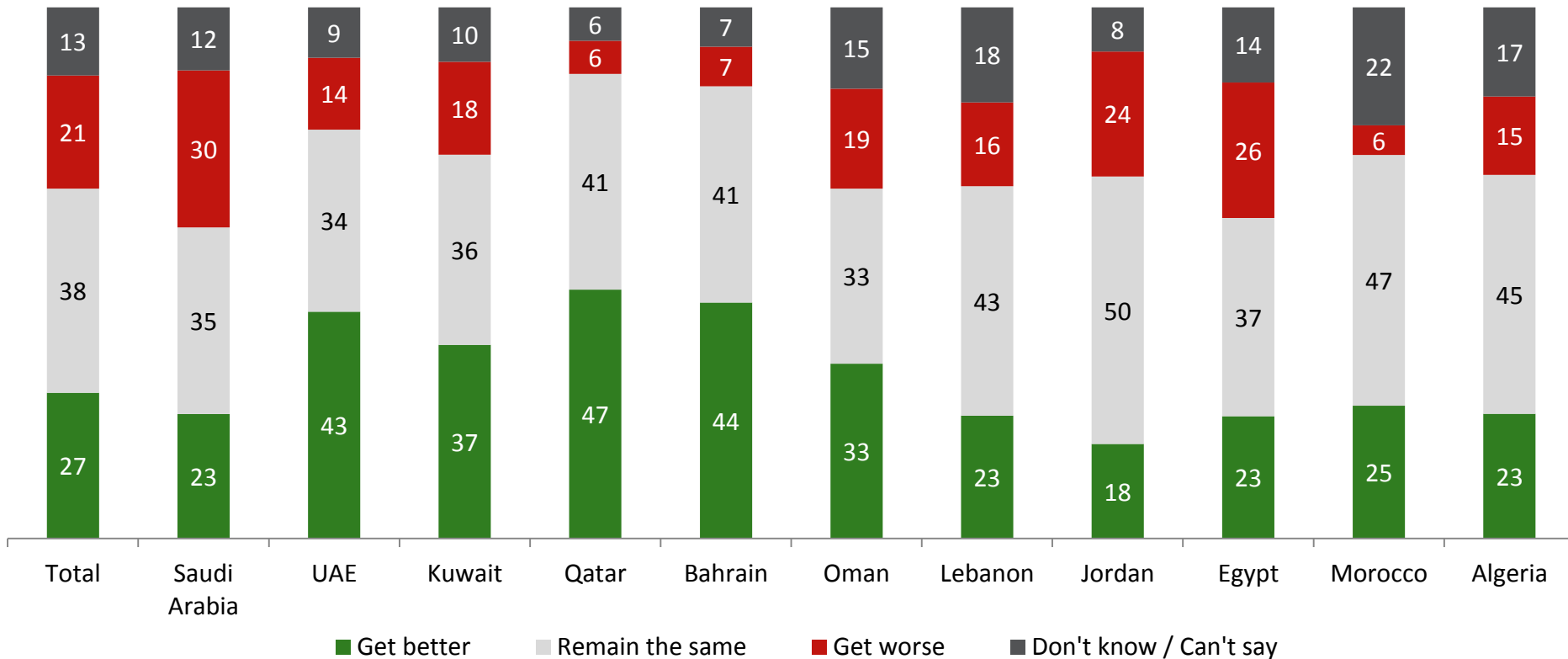
Base: Those employed (2466), KSA (490), UAE (274), Kuwait (137), Qatar (96), Bahrain (54), Oman (85), Lebanon (95), Jordan (157), Egypt (517), Morocco (72), Algeria (149)



# Expected change in job attributes: Current compensation (salary & allowances)

- 27% of respondents expect the current compensation to get better in the next 6 months, while another 21% expect it to get worse.
- GCC residents expect a positive change (33%) compared to 18% in Levant and 23% in North Africa. Residents of Qatar (47%) and Bahrain (44%) are most optimistic about the positive change in current compensation.

All in %



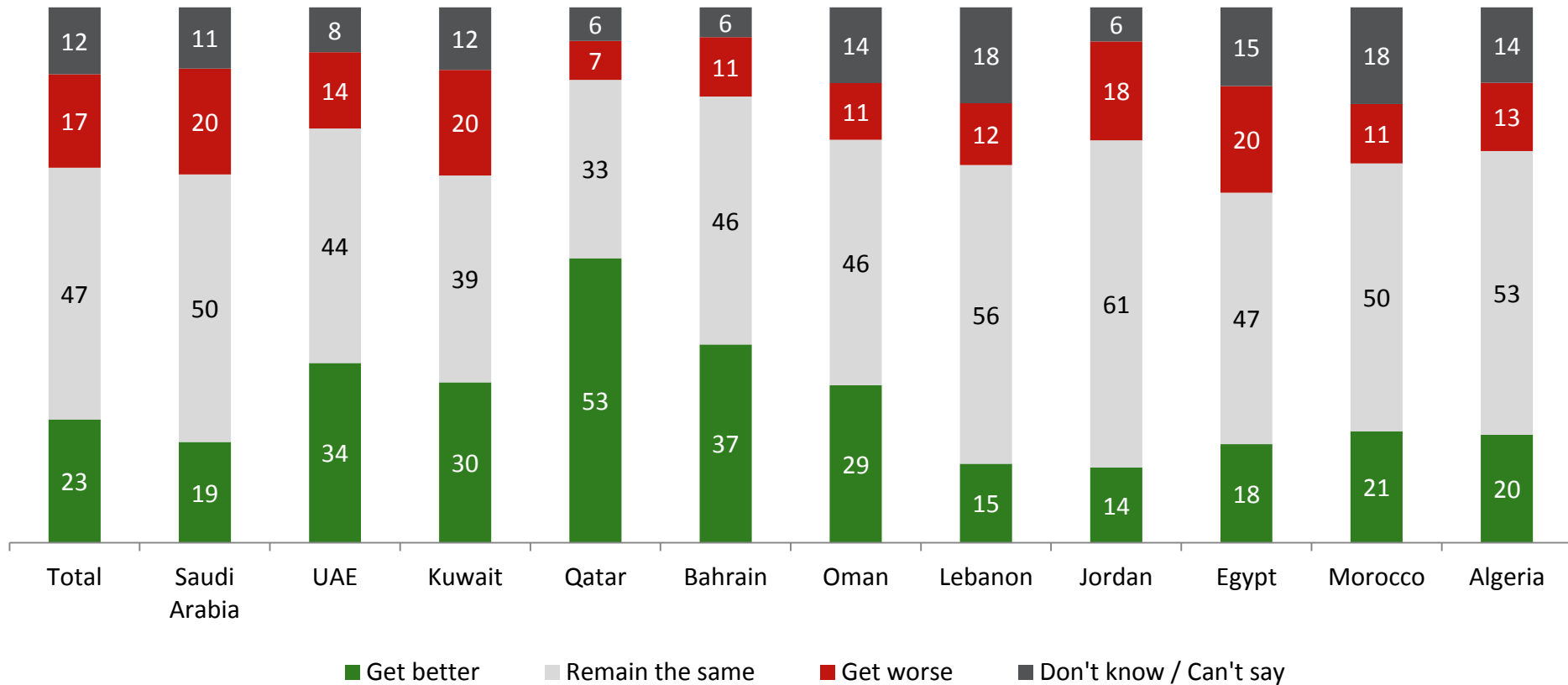
Q. How do you expect these job attributes to change over the next 6 month?

Base: Those employed (2466), KSA (490), UAE (274), Kuwait (137), Qatar (96), Bahrain (54), Oman (85), Lebanon (95), Jordan (157), Egypt (517), Morocco (72), Algeria (149)

# Expected change in job attributes: Non-monetary benefits

- 47% of respondents claim that the non-monetary benefits will remain the same over the next 6 months, especially among residents of Jordan (61%) and Lebanon (56%).

All in %

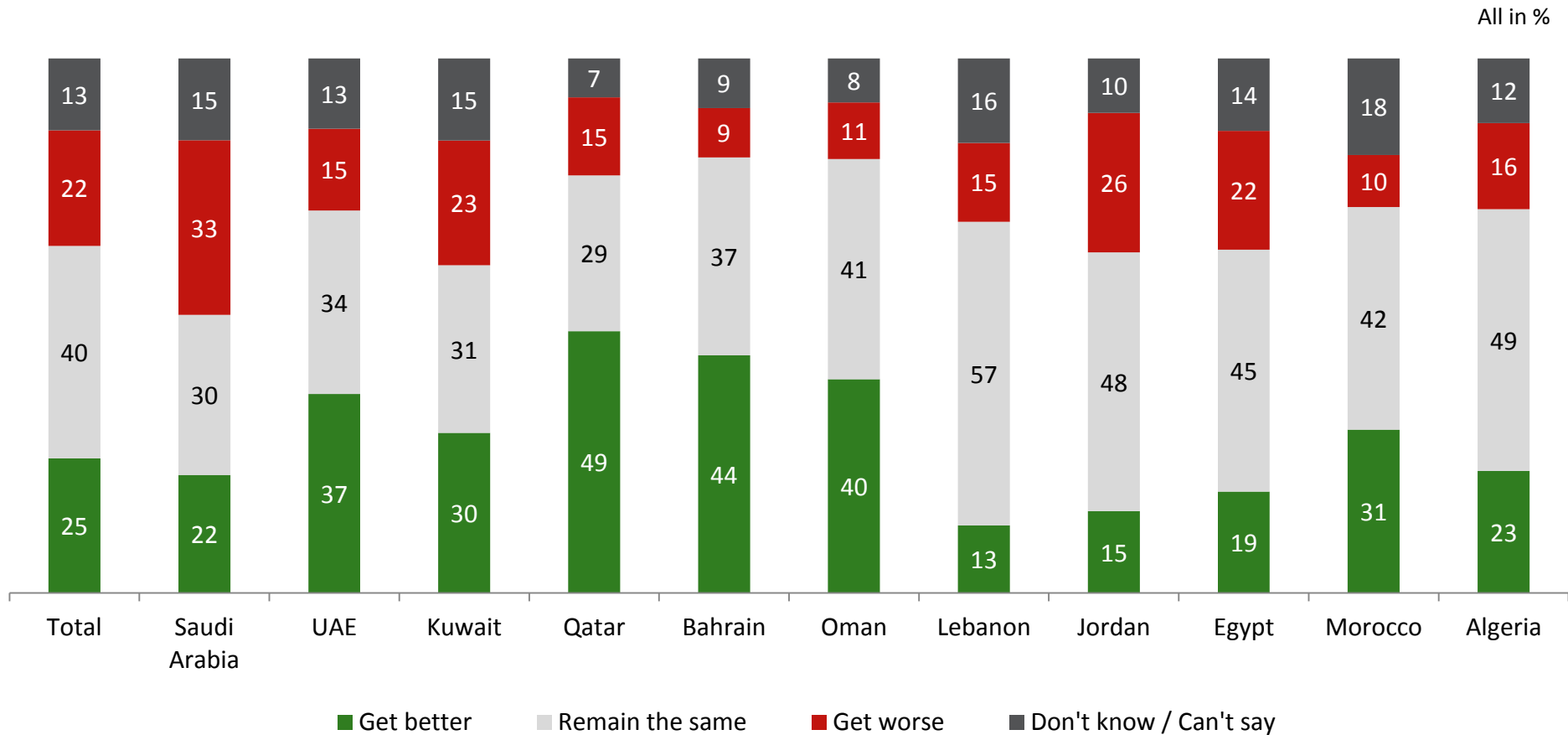


Q. How do you expect these job attributes to change over the next 6 month?

Base: Those employed (2466), KSA (490), UAE (274), Kuwait (137), Qatar (96), Bahrain (54), Oman (85), Lebanon (95), Jordan (157), Egypt (517), Morocco (72), Algeria (149)

# Expected change in job attributes: Job security

- A quarter of respondents expect their job security to get better in the next 6 months, especially in Qatar (49%) and Bahrain (44%).

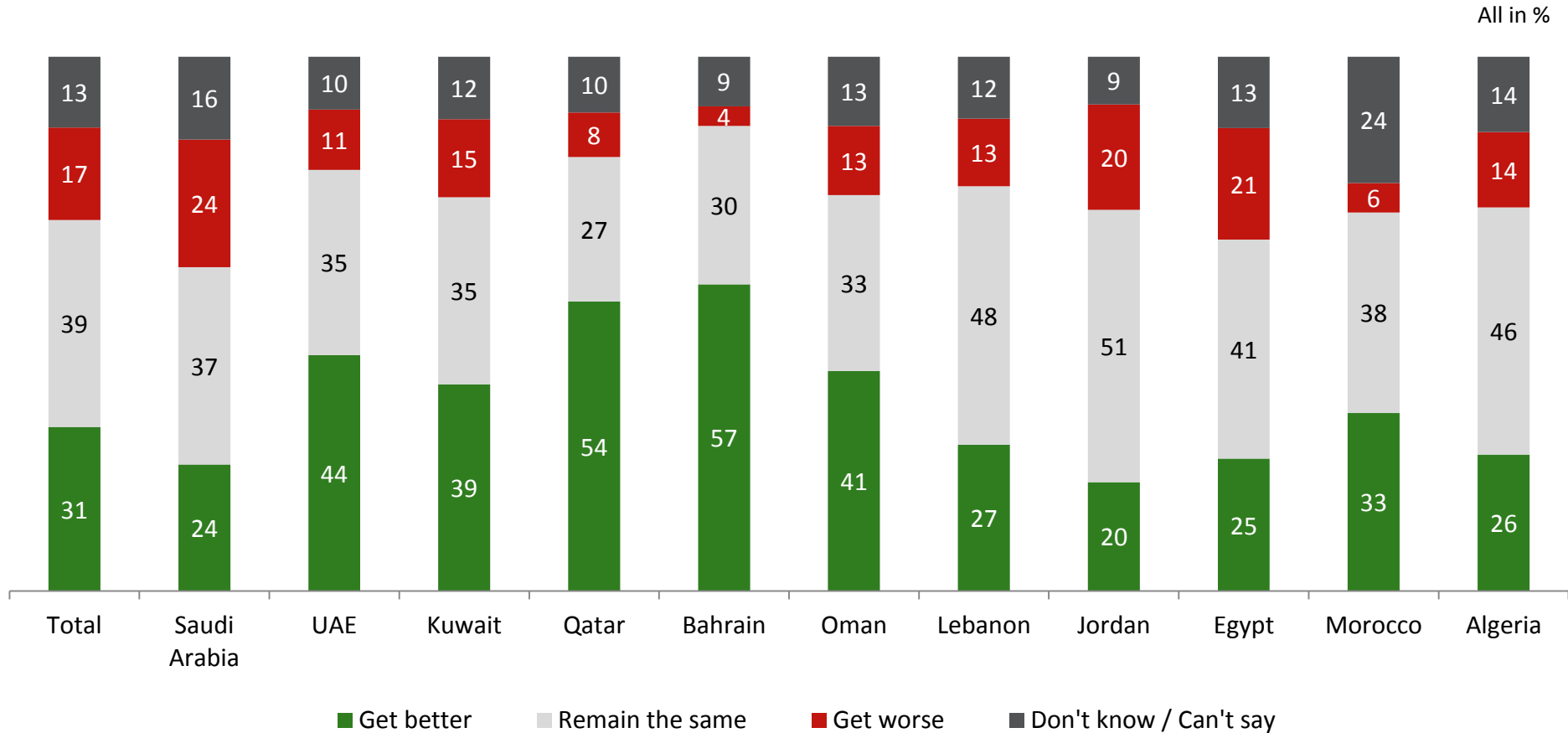


Q. How do you expect these job attributes to change over the next 6 month?

Base: Those employed (2466), KSA (490), UAE (274), Kuwait (137), Qatar (96), Bahrain (54), Oman (85), Lebanon (95), Jordan (157), Egypt (517), Morocco (72), Algeria (149)

# Expected change in job attributes: Training & professional development

- Nearly one-third of respondents are positive that the training and professional benefits at their job will get better in the next 6 months, especially among GCC residents (36%) compared to 21% in Levant and 26% in North Africa.



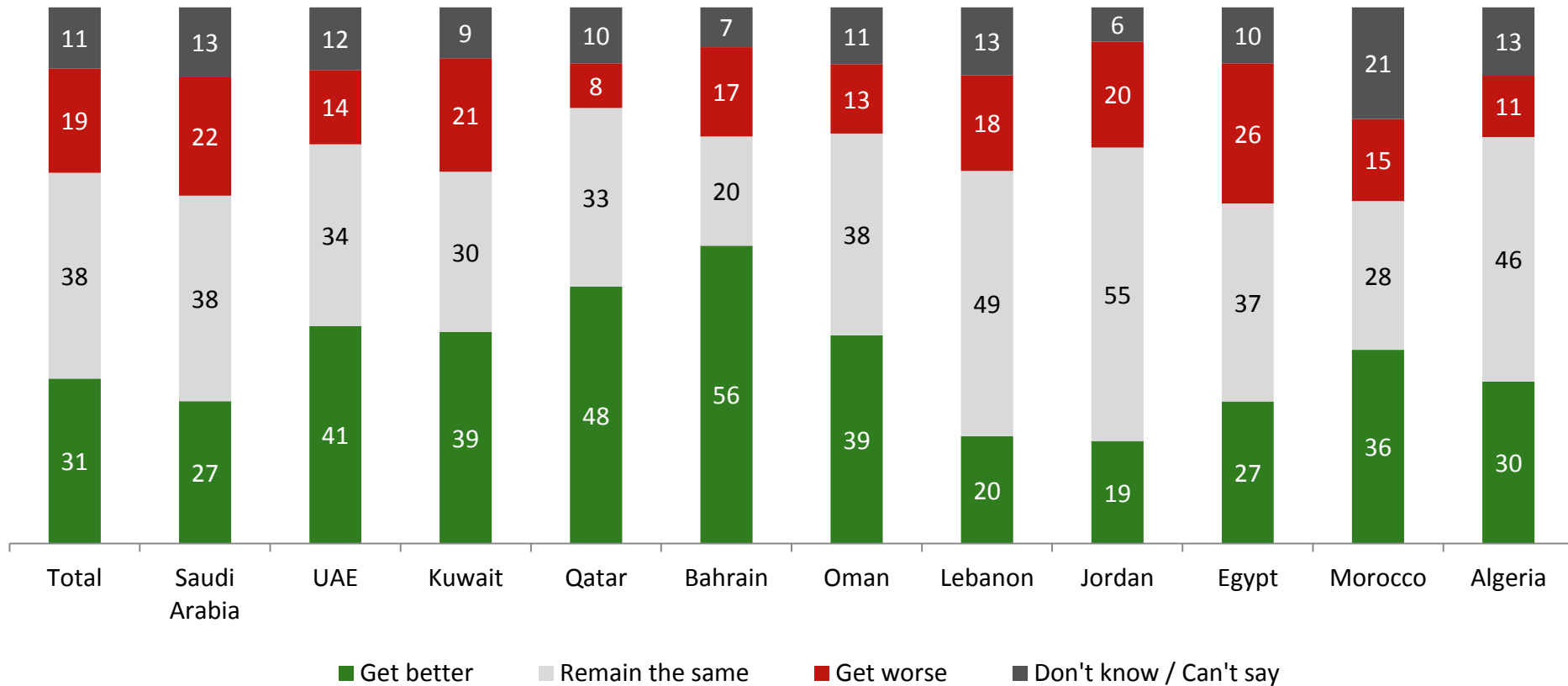
Q. How do you expect these job attributes to change over the next 6 month?

Base: Those employed (2466), KSA (490), UAE (274), Kuwait (137), Qatar (96), Bahrain (54), Oman (85), Lebanon (95), Jordan (157), Egypt (517), Morocco (72), Algeria (149)

# Expected change in job attributes: Work-life Balance

- Nearly one-third of respondents are positive that the training and professional benefits at their job will get better in the next 6 months, especially among residents of Bahrain (56%) and Qatar (48%).

All in %



Q. How do you expect these job attributes to change over the next 6 month?

Base: Those employed (2466), KSA (490), UAE (274), Kuwait (137), Qatar (96), Bahrain (54), Oman (85), Lebanon (95), Jordan (157), Egypt (517), Morocco (72), Algeria (149)



Section 2d

# SUMMARY

# Summary- Personal Economic Situation

- Overall, only 14% believe that their financial condition is better now than it was 6 months ago.
- Among GCC residents, Qatar (30%), Bahrain (27%) and Kuwait (22%) consider their financial position to be better. 55% of Egyptian residents state that their financial condition is worse now as compared to 6 months ago, the highest amongst any country in the MENA region.
- Overall, close to two-fifths (37%) expect their financial condition to improve in the next 6 months. This belief is significantly higher in the GCC (44%) as compared to other MENA regions (Levant: 32%, North Africa: 31%).
- Majority of respondents (72%) expect the cost of living to increase in the next 6 months. This sentiment is higher in the Levant (76%) and in North Africa (75%) as compared to the GCC (68%).
- Three-fifths of respondents (60%) believe that their savings have decreased in comparison to last year, while only 15% believe the opposite. A lower proportion of CGG residents (53%) claim that, as compared to Levant and North Africa residents (67% and 64% respectively).

# Summary- Country's Economic Situation

- 45% of respondents believe that their country's economy has gotten worse compared to 6 months earlier, while only 17% believe the opposite. Those from North Africa and the Levant are more negative about their country's economy, with 54% and 53% respectively stating that it has receded (GCC: 33%).
- Almost a third (31%) of respondents expect the economy in their country of residence to improve in the next 6 months, while 29% expect the opposite. Those living in the GCC and especially residents of Qatar (65%) and Bahrain (55%) are more optimistic about their country's future economy (GCC: 42%) as compared to those living in the Levant (15%) and in North Africa (24%).
- 22% of respondents are positive about the current business conditions. Perception is more positive among GCC residents (very good/ good: 32%) in comparison to respondents from the Levant and North Africa (very good/ good: 13% and 11%, respectively).
- Overall, 44% of MENA residents expect the business conditions to get better within the next year.
- 38% believe that there are few jobs available across few industries, while 20% state that there are few jobs available across various industries.
- 45% of respondents are hopeful to find their ideal job in the next 6 months, while 35% of respondents are pessimistic about it.
- 28% of respondents expect the number of jobs available in the next 6 months to decrease while another 26% expect them to increase and 29% expect it to remain the same.



# Summary- Current Job

- 40% of respondents state that the number of employees in their company has decreased in comparison to 6 months ago, while 21% believe that it has increased.
- A somewhat higher proportion of GCC residents (23%) claim that this number has increased as compared to Levant (17%) and North Africa (20%).
- 29% of respondents expect the number of employees in their company to decrease in the next 6 months, while about the same proportion (27%) expect the opposite.
- GCC residents are significantly more optimistic (31%) in comparison to Levant (20%) and North Africa (22%).
- Generally, respondents are satisfied with the work-life balance (46%), non-monetary benefits and career growth (both at 43%). However, slightly over half of respondents are dissatisfied with their current compensation (51%).
- Respondents expect their job attributes to improve over the next 6 months, especially with regards to career growth (34%), training and professional development and work-life balance (both at 31%).



Section 3

# RESEARCH METHODOLOGY

# Sample Definition

- Age and Gender:
  - Adult males and females
  - Aged 18+ years
- Nationalities:
  - GCC Arabs, North Africans, Levant, Western Expats and Asians
- Country of Residence
  - GCC: UAE, KSA, Kuwait, Oman, Qatar, Bahrain
  - Levant: Lebanon, Jordan
  - North Africa: Egypt, Morocco, Algeria
- Data Collection
  - All data was collected online.
  - Fieldwork was conducted between 1st August – 22nd August, 2017. The total number of respondents achieved was 4,224



Section 4

# INDICES

# Average of Past Indices: April 2007 – October 2012

	UAE	Saudi Arabia	Kuwait	Qatar	Lebanon	Egypt	Algeria
<i>Consumer Expectancy Index (CEI)</i>	88.5	89.4	90.7	91.9	103.7	98.2	92.0
<i>Propensity to Consume (PCI)</i>	86.7	83.0	81.4	81.6	109.3	81.0	81.2
<i>Consumer Confidence Index (CCI)</i>	85.0	85.8	86.9	86.9	107.1	89.3	89.6
<i>Employee Confidence Index (ECI)</i>	80.3	84.3	84.5	84.8	99.5	89.1	89.1

# Base Period Values – March 2013

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
<b>Base:</b>	<b>16379</b>	<b>2730</b>	<b>1976</b>	<b>457</b>	<b>509</b>	<b>120</b>	<b>220</b>	<b>506</b>	<b>252</b>	<b>1700</b>	<b>7784</b>	<b>1002</b>	<b>992</b>	<b>431</b>
<i>Current Economic Scenario</i>	81.14	112.91	114.07	102.52	117.49	92.08	115.45	77.15	24.01	51.21	56.35	83.73	111.14	66.36
<i>Expected Economic Scenario</i>	89.19	103.71	112.90	185.74	116.11	101.11	111.36	67.33	43.39	66.41	77.27	93.31	98.49	88.55
<i>Employee Outlook</i>	115.50	131.06	128.61	122.90	140.93	122.96	140.61	101.43	69.21	97.40	102.88	146.26	123.41	111.53
<b>Overall Consumer Confidence</b>	285.83	347.69	355.58	330.16	374.52	316.15	367.43	222.90	136.60	215.02	236.50	290.31	333.04	266.44

# Period Values – September 2013

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
<b>Base:</b>	<b>6585</b>	<b>1097</b>	<b>717</b>	<b>151</b>	<b>183</b>	<b>78</b>	<b>141</b>	<b>210</b>	<b>145</b>	<b>669</b>	<b>1871</b>	<b>426</b>	<b>1465</b>	<b>252</b>
<i>Current Economic Scenario</i>	88.47	110.16	110.74	103.14 6	122.40	110.90	123.05	57.86	31.72	77.04	73.81	92.37	111.78	62.70
<i>Expected Economic Scenario</i>	141.50	149.92	157.51	153.20	159.38	138.46	156.97	116.67	97.24	120.78	141.71	142.41	142.79	126.46
<i>Employee Outlook</i>	117.90	126.96	128.49	127.50	142.29	116.80	144.55	96.10	65.12	97.50	146.03	119.04	123.03	146.07
<b>Overall Consumer Confidence</b>	347.87	387.04	396.74	384.34	424.08	366.16	424.57	270.63	194.08	272.31	328.77	353.82	377.60	302.22

# Period Values – February 2014

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
<b>Base:</b>	<b>6585</b>	<b>1097</b>	<b>717</b>	<b>151</b>	<b>183</b>	<b>78</b>	<b>141</b>	<b>210</b>	<b>145</b>	<b>669</b>	<b>1871</b>	<b>426</b>	<b>1465</b>	<b>252</b>
<i>Current Economic Scenario</i>	83.72	185.49	116.52	94.86	115.22	97.22	131.36	44.55	51.61	43.31	68.88	78.88	94.89	83.99
<i>Expected Economic Scenario</i>	137.21	185.12	158.60	185.03	153.62	135.19	161.52	112.32	103.94	114.55	133.39	134.22	135.31	140.38
<i>Employee Outlook</i>	146.02	124.65	138.77	129.00	139.35	107.50	139.29	89.27	63.02	89.22	99.96	107.49	117.09	118.17
<b>Overall Consumer Confidence</b>	333.95	376.27	413.66	370.89	408.19	339.91	432.16	246.14	218.58	247.09	302.23	320.59	347.29	342.77



# Period Values – August 2014

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
<b>Base:</b>	<b>5075</b>	<b>1090</b>	<b>847</b>	<b>187</b>	<b>230</b>	<b>69</b>	<b>65</b>	<b>158</b>	<b>63</b>	<b>377</b>	<b>1013</b>	<b>330</b>	<b>505</b>	<b>141</b>
<i>Current Economic Scenario</i>	95.06	109.86	146.16	102.14	121.30	105.07	119.23	59.18	52.38	62.47	78.04	87.27	103.27	61.35
<i>Expected Economic Scenario</i>	142.26	185.92	152.89	185.06	156.23	135.27	153.33	111.18	146.76	124.31	140.80	135.45	140.92	130.50
<i>Employee Outlook</i>	120.16	129.41	133.87	120.61	140.94	119.146	131.73	101.33	75.60	100.96	185.57	106.40	119.34	103.17
<b>Overall Consumer Confidence</b>	357.49	387.19	399.93	369.81	418.47	359.98	404.29	271.69	241.73	287.74	323.40	329.12	363.53	295.01

# Period Values – January 2015

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
<b>Base:</b>	<b>4263</b>	<b>819</b>	<b>495</b>	<b>135</b>	<b>131</b>	<b>94</b>	<b>107</b>	<b>189</b>	<b>77</b>	<b>234</b>	<b>1061</b>	<b>298</b>	<b>501</b>	<b>145</b>
<i>Current Economic Scenario</i>	88.63	103.11	109.80	86.67	114.50	97.34	108.41	61.38	25.93	146.96	84.21	98.15	71.26	62.76
<i>Expected Economic Scenario</i>	136.12	141.27	152.39	139.01	148.85	134.75	138.32	111.82	97.53	122.22	137.04	138.14	125.22	131.95
<i>Employee Outlook</i>	146.94	123.14	131.78	106.63	134.77	119.02	124.43	98.43	66.89	101.46	101.93	112.75	108.63	110.00
<b>Overall Consumer Confidence</b>	338.70	367.53	393.97	332.31	397.89	351.11	371.15	271.62	190.35	288.63	323.18	349.05	305.11	304.71

# Period Values – July 2015

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
<b>Base:</b>	<b>8882</b>	<b>1748</b>	<b>1011</b>	<b>2146</b>	<b>255</b>	<b>114</b>	<b>144</b>	<b>231</b>	<b>63</b>	<b>703</b>	<b>2118</b>	<b>733</b>	<b>1465</b>	<b>363</b>
<i>Current Economic Scenario</i>	93.01	111.04	114.94	102.84	114.71	99.12	118.75	46.75	34.13	69.35	90.30	91.68	80.22	77.68
<i>Expected Economic Scenario</i>	140.73	185.10	156.81	150.13	156.73	142.11	150.69	109.38	185.23	126.03	144.13	139.15	127.37	122.68
<i>Employee Outlook</i>	114.90	127.13	136.19	122.94	136.83	109.29	136.69	81.08	71.32	86.91	185.39	111.62	105.70	93.04
<b>Overall Consumer Confidence</b>	348.65	385.27	407.94	375.90	408.27	350.52	406.13	237.21	209.68	282.29	338.82	342.45	313.29	270.40

# Period Values – January 2016

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
<b>Base:</b>	<b>3,905</b>	<b>660</b>	<b>629</b>	<b>2146</b>	<b>161</b>	<b>1146</b>	<b>168</b>	<b>175</b>	<b>24</b>	<b>176</b>	<b>585</b>	<b>302</b>	<b>486</b>	<b>111</b>
<i>Current Economic Scenario</i>	76.12	83.33	95.79	79.92	90.06	61.59	81.55	50.86	52.08	55.11	76.41	81.79	56.89	51.35
<i>Expected Economic Scenario</i>	130.03	139.39	137.78	129.92	137.68	120.73	131.55	108.38	100.00	119.32	131.28	136.42	116.39	124.32
<i>Employee Outlook</i>	100.52	107.08	115.23	95.98	111.90	93.75	101.95	84.65	63.19	78.65	95.44	98.67	87.45	96.31
<b>Overall Consumer Confidence</b>	306.67	329.81	348.80	305.83	339.14 6	276.07	315.04	243.88	215.28	253.08	303.13	316.88	260.73	271.98

# Period Values – August 2016

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Syria	Jordan	Egypt	Morocco	Algeria	Tunisia
<b>Base:</b>	<b>2,893</b>	<b>490</b>	<b>279</b>	<b>119</b>	<b>183</b>	<b>40</b>	<b>108</b>	<b>95</b>	<b>23</b>	<b>165</b>	<b>587</b>	<b>245</b>	<b>419</b>	<b>140</b>
<i>Current Economic Scenario</i>	72.05	81.33	100.90	82.35	100.00	80.00	87.04	69.47	34.78	58.18	47.70	87.55	62.89	49.146
<i>Expected Economic Scenario</i>	128.85	134.97	145.04	132.77	139.71	139.17	136.11	146.33	97.10	121.82	117.55	140.82	123.15	116.67
<i>Employee Outlook</i>	96.87	94.59	125.28	102.13	106.65	109.78	111.23	82.50	69.53	85.16	83.23	185.66	90.43	91.07
<b>Overall Consumer Confidence</b>	297.77	310.88	371.22	317.25	346.36	328.95	334.38	265.31	201.42	265.16	248.48	333.03	276.47	257.38

# Last Period Values – January 2017

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Jordan	Egypt	Morocco	Algeria	Tunisia
<b>Base:</b>	<b>4,224</b>	<b>865</b>	<b>341</b>	<b>185</b>	<b>185</b>	<b>77</b>	<b>146</b>	<b>146</b>	<b>146</b>	<b>573</b>	<b>226</b>	<b>391</b>	<b>71</b>
<i>Current Economic Scenario</i>	74.96	79.46	106.25	185.33	116.33	108.33	90.63	72.66	51.03	42.93	87.61	67.26	146.79
<i>Expected Economic Scenario</i>	129.43	130.99	148.81	143.91	185.85	146.30	125.52	139.06	120.32	115.42	131.56	122.34	133.80
<i>Employee Outlook</i>	101.77	91.03	125.97	122.67	121.19	125.87	118.75	111.49	88.02	84.57	109.80	102.89	96.63
<b>Overall Consumer Confidence</b>	305.93	301.47	381.03	370.91	385.36	380.50	334.90	323.21	259.36	242.91	328.98	292.49	295.23

# Current Period Values – August 2017

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Jordan	Egypt	Morocco	Algeria
<b>Base:</b>	<b>4224</b>	<b>865</b>	<b>349</b>	<b>185</b>	<b>125</b>	<b>77</b>	<b>146</b>	<b>146</b>	<b>305</b>	<b>870</b>	<b>309</b>	<b>317</b>
<i>Current Economic Scenario</i>	71.79	73.87	98.14	98.65	110.00	103.25	100.00	63.70	77.75	77.48	77.02	71.14
<i>Expected Economic Scenario</i>	128.29	127.78	145.75	148.29	148.80	150.22	143.66	122.60	120.87	120.84	128.37	123.24
<i>Employee Outlook</i>	96.98	84.46	119.16	115.60	129.43	125.69	118.97	85.53	83.76	86.90	111.63	100.59
<b>Overall Consumer Confidence</b>	297.06	286.12	363.05	362.77	388.23	379.16	362.63	271.83	259.39	262.22	317.03	294.96

# Overall Indices

	Total	Saudi Arabia	UAE	Kuwait	Qatar	Bahrain	Oman	Lebanon	Jordan	Egypt	Morocco	Algeria
<i>Current Economic Scenario (CES)</i>	88.48	65.43	86.03	96.23	93.63	112.12	86.61	117.63	106.93	96.69	91.99	146.01
<i>Expected Economic Scenario (EES)</i>	143.84	123.21	129.09	141.58	128.15	148.57	129.00	182.10	182.01	156.38	137.57	125.13
<i>Employee Outlook (ECI)</i>	83.97	146.45	92.65	94.06	91.84	102.22	84.61	84.32	86.00	84.46	98.56	81.50
<b>Overall Consumer Confidence (CCI)</b>	103.93	82.29	102.10	109.81	103.66	119.93	98.69	121.95	120.146	110.88	109.20	88.57





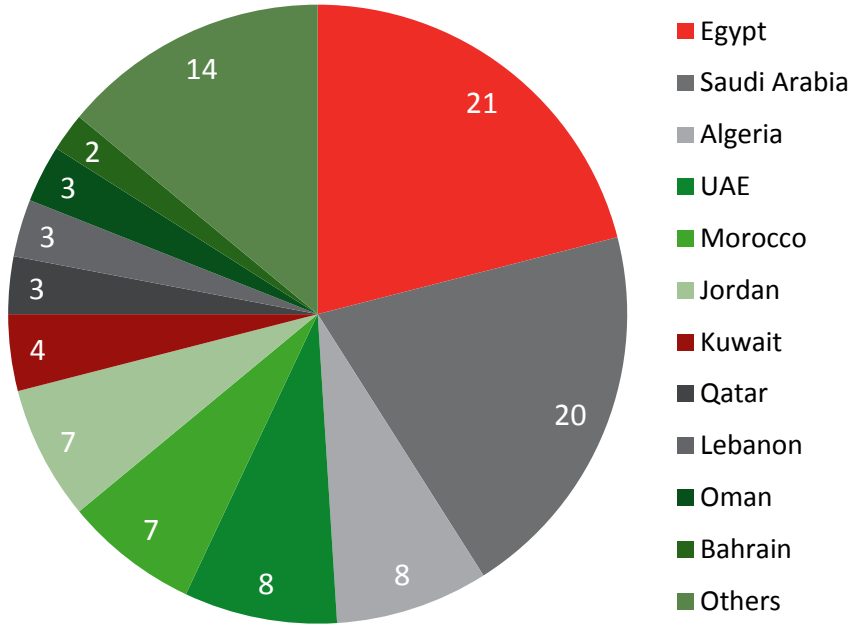
Section 5

# DEMOGRAPHICS

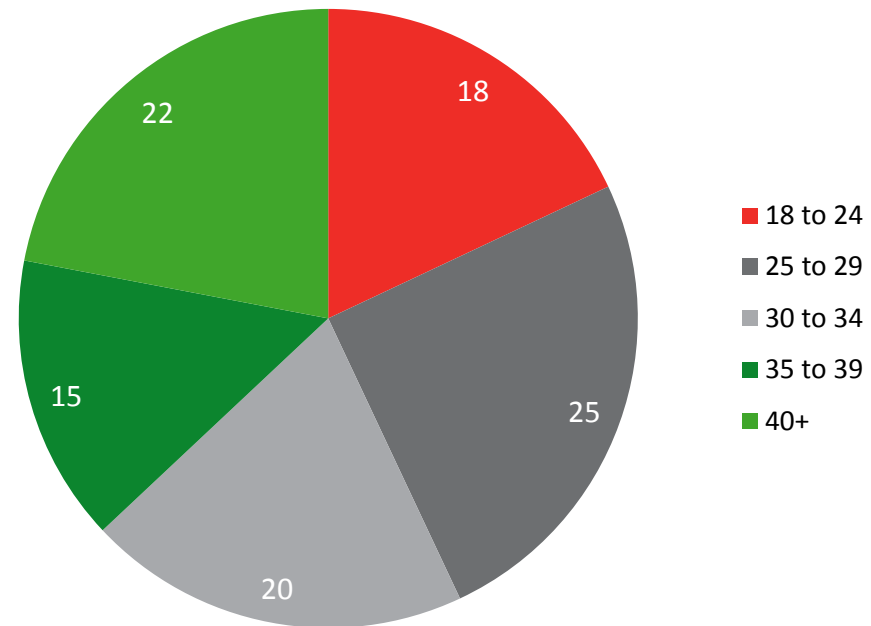
# Respondent Profile 1/4 – Personal

All in %

### Country of residence



### Age Groups

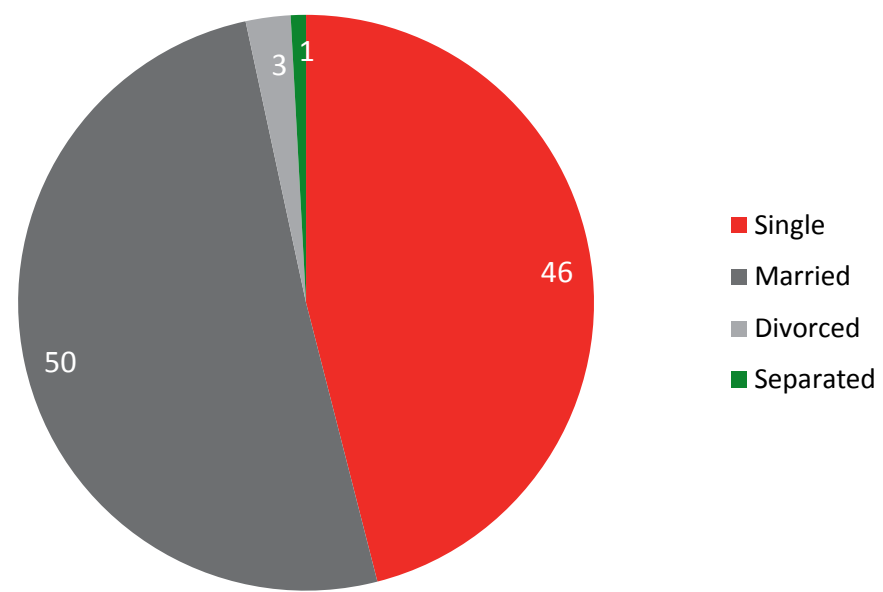


Base: Total (4,224)

# Respondent Profile 2/4 – Personal

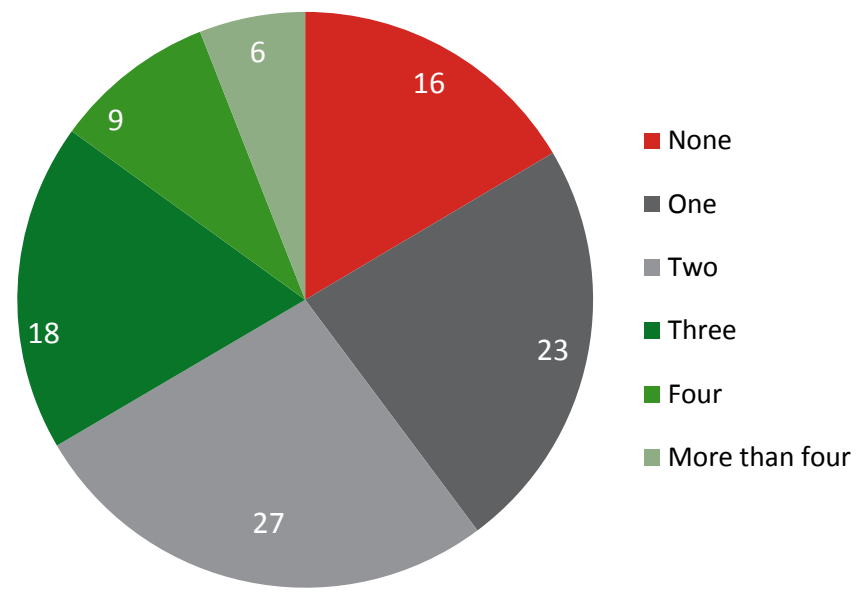
All in %

### Marital Status



Base: Total (4,224)

### No. of children

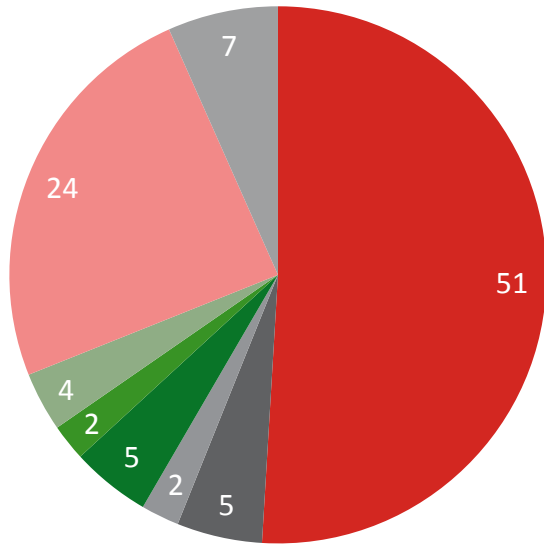


Base: Those Married/Divorced/Separated (2287)

# Respondent Profile 3/4 – Professional

All in %

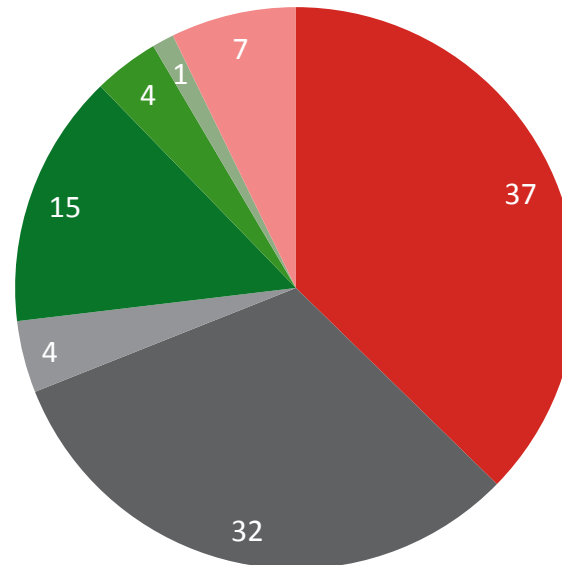
## Work Status



- Working full time
- Working part time (8 to 29 hrs/wk)
- Working part time (< 8 hrs/ wk)
- Full-time student
- Retired
- Full-time homemaker
- Unemployed
- Other

Base: Total (4,224)

## Sector



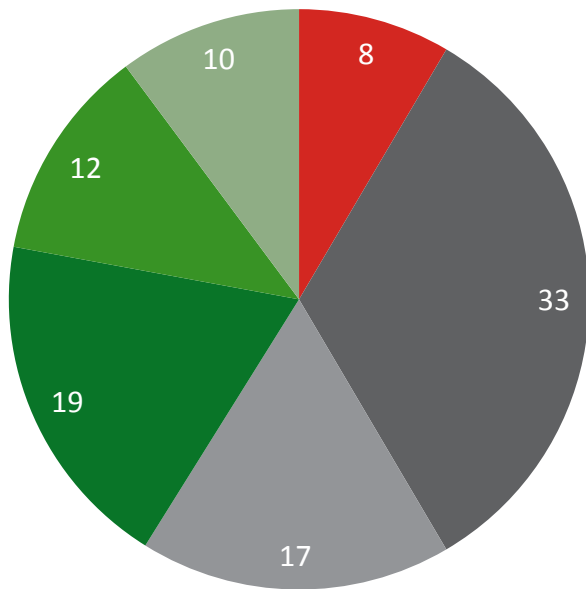
- Private sector – Multinational company
- Private sector – Local company
- Private sector – Self-owned/family-owned company
- Public or government sector
- Semi-government/Quasi-governmental company
- Charity or voluntary sector
- Other

Base: Those employed (2466)

# Respondent Profile 4/4 – Professional

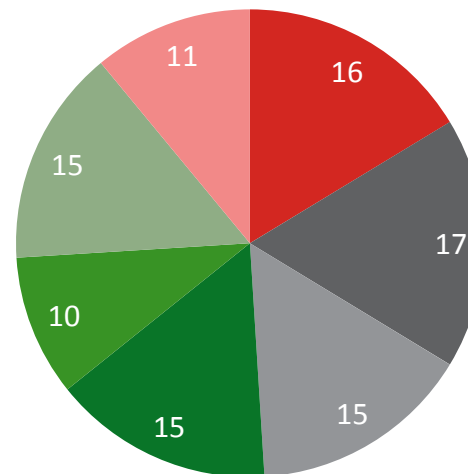
All in %

## Seniority



- Senior Management
- Middle Management
- Junior Manager/ Team leader
- Employed Professional – Doctor / Lawyer/ Architect, etc.
- Executive with no managerial responsibilities

## Income Group



- Under US\$ 200 per month
- US\$ 200-500 per month
- US\$ 501-1,000 per month
- US\$ 1,001-2,000 per month
- US\$ 2,001-3,000 per month
- US\$ 3,001 or more
- Don't know/ Can't say

Base: Those employed (2466)



**THANK YOU**