

Working Women in the MENA



December 2017

Objectives

- The Bayt.com Working Women in the Middle East Survey explores the status of working women in the Middle East and North Africa (MENA)
- Among other key insights, the survey analyzes the perceptions of women in the region when it comes to equality at work
- It also looks into their motivations for employment, challenges faced at work, as well as career and life ambitions



Section 1

RESEARCH METHODOLOGY



Sample definition

All respondents were working females

Age

Aged 18 years and above

Nationalities

GCC Arabs, North Africans, Levantines, Westerners, Asians, Others

Country of Residence

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

Levant: Lebanon, Jordan

North Africa: Egypt, Morocco, Algeria, Tunisia

Data Collection

All data was collected online. Fieldwork was done from October 26th to November 26th 2017.

The total number of respondents achieved was 4053



Section 2

RESPONDENT PROFILE

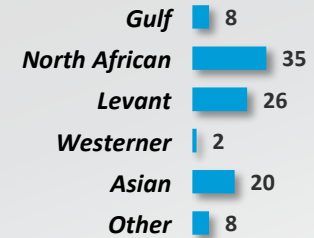
Respondent Profile (1/4)

GENDER



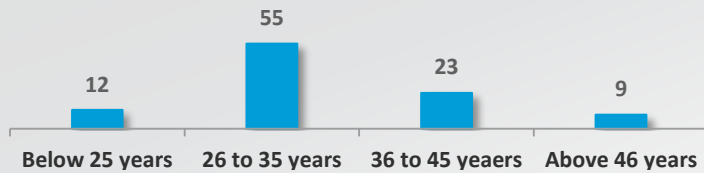
100%

NATIONALITY

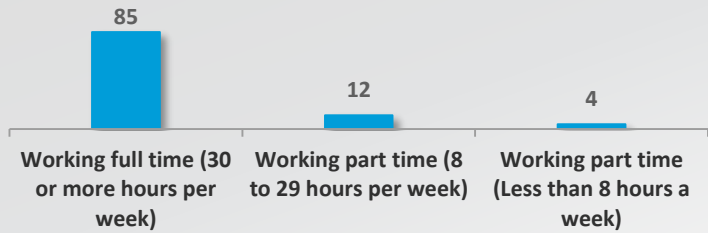


AGE GROUP

Average – 32.39 yrs.



WORKING STATUS



COUNTRY OF RESIDENCE

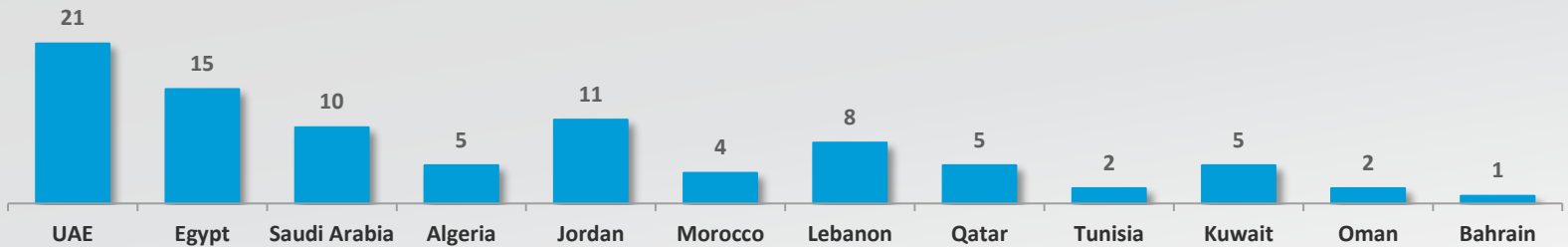


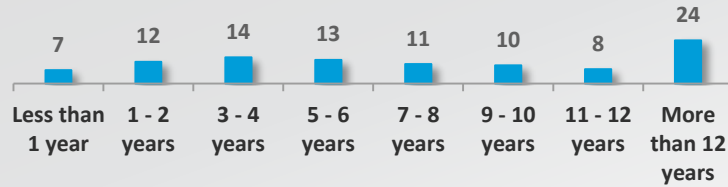
Fig in %

Base: All respondents (n=4053)

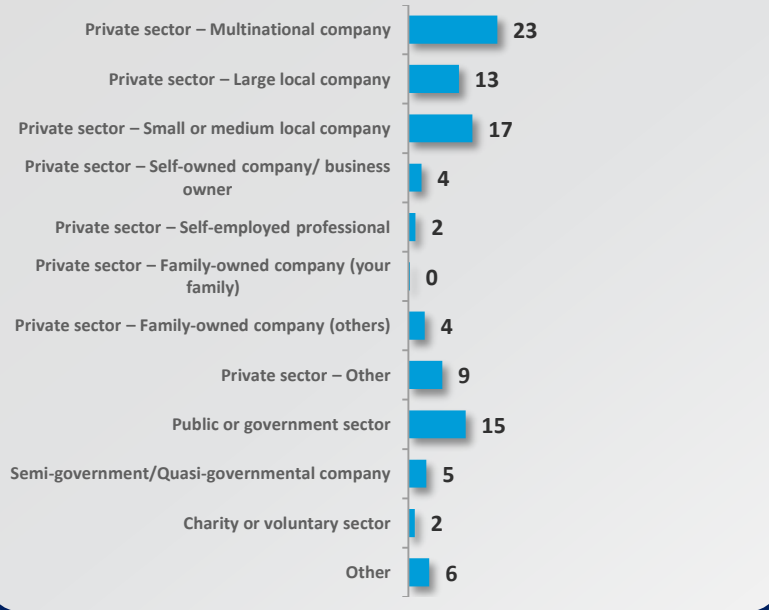
Respondent Profile (2/4)

YEARS OF WORK EXPERIENCE

Average – 8.86 yrs.



SECTOR



TOP 10 INDUSTRIES

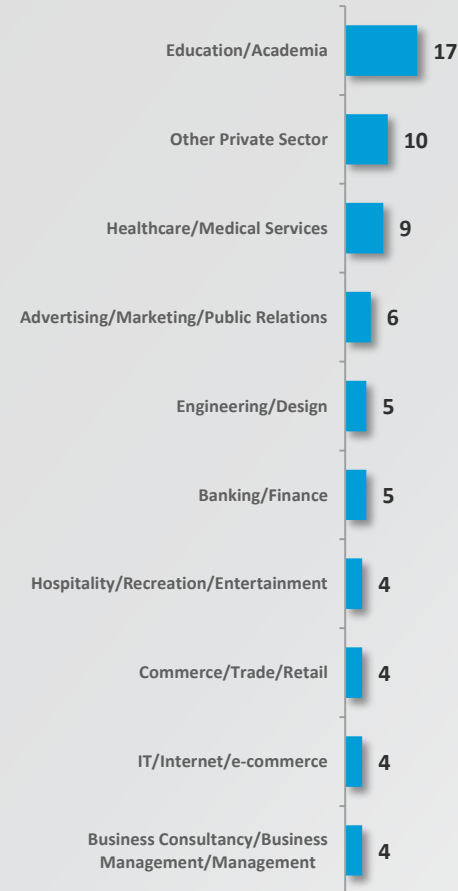
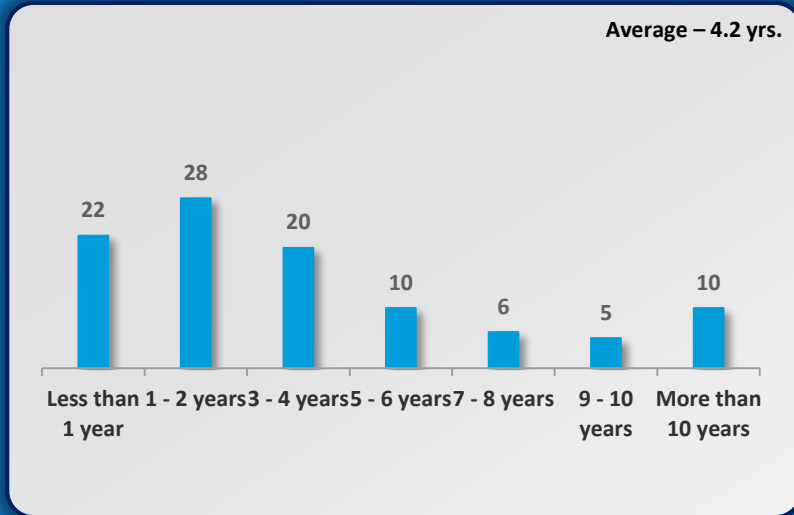


Fig in %

Base: All respondents (n=4053)

Respondent Profile (3/4)

NO. OF YEARS IN CURRENT COMPANY



TOP 10 POSITIONS

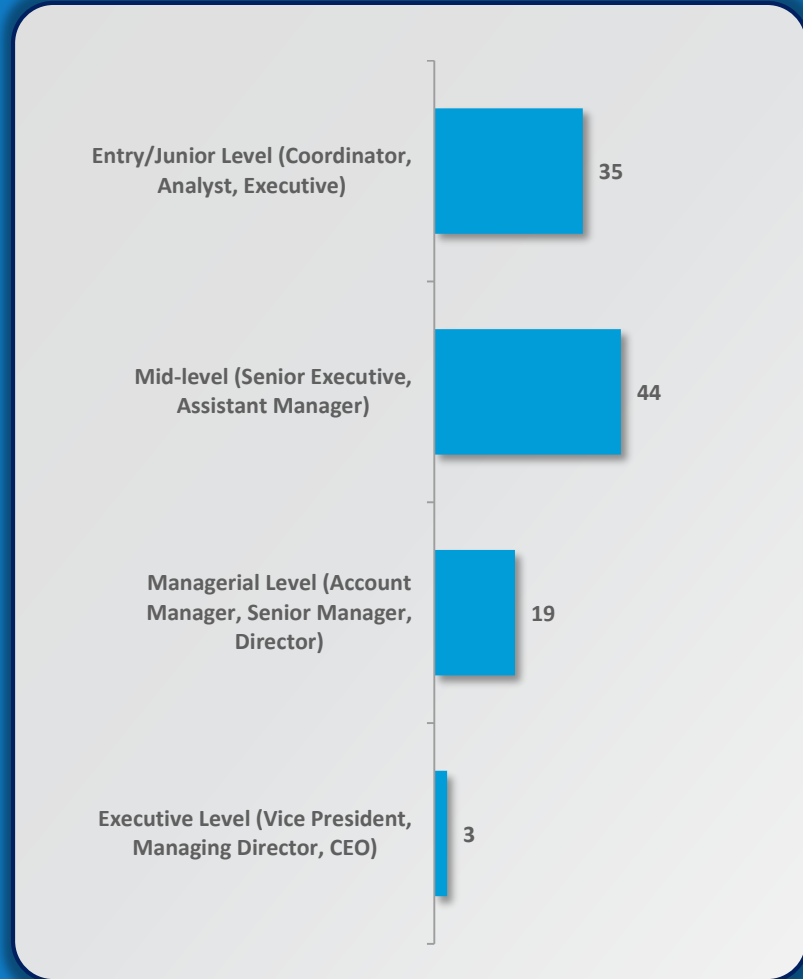
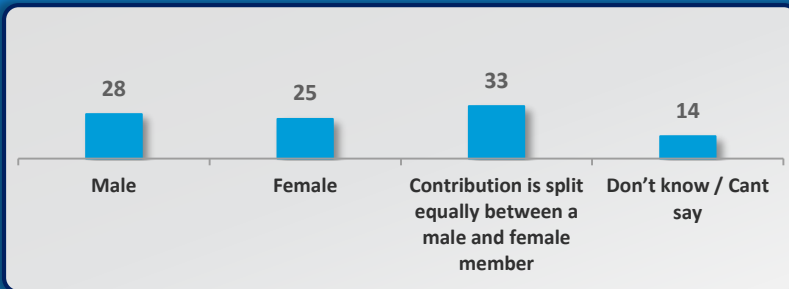


Fig in %

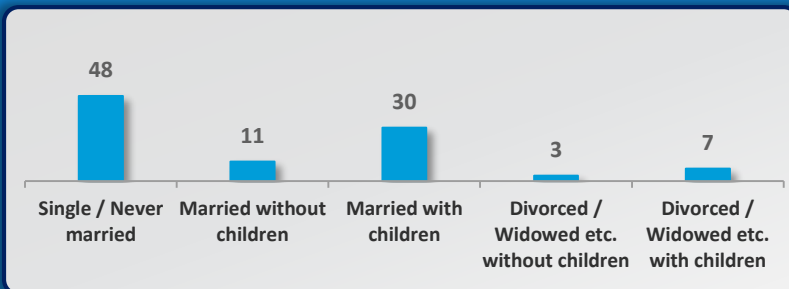
Base: All respondents (n=4053)

Respondent Profile (4/4)

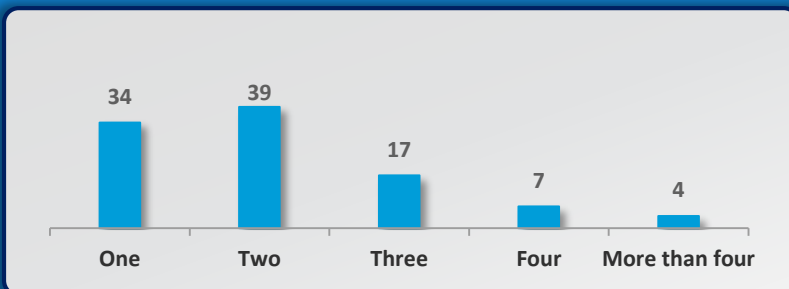
PERSON WHO CONTRIBUTES MOST TO THE HOUSEHOLD INCOME



MARITAL STATUS



NO. OF CHILDREN



MONTHLY INCOME LEVEL



Fig in %

Base: All respondents (n=4053)



Section 3

EXECUTIVE SUMMARY

Summary and key results (1/5)

Reasons for working & Future aspirations

- Financial independence emerges as the top reason for working (59%) followed by the ability to support / financially contribute to the household (50%)

Working in mix gender environment

- Overall, 88% of respondents work in a mix gender environment (together and segregated)except for Saudi Arabia where the proportion of mixed gender workplace is lowest (72%)
- 68% claim to be comfortable in a mix gender environment with only 5% expressing their discomfort in working with male colleagues. The comfort factor is highest in Lebanon (82%) while its lowest in Oman.
- 74% of the respondents currently have male managers. Interestingly, when asked about future preference , only 3% prefer to have female manager while 24% prefer to have male managers & 73% have no preference

Summary and key results (2/5)

Gender Equality at work place

- Overall, a majority females feel that they are treated at par with their male colleagues while around a third feel that males are given preferential treatment over females.
- In general, females feel much stronger gender bias when it comes to remuneration, career progression and even during recruitment and in terms of benefits. They perceive less discrimination in regards to working hours and advice and support, as well as training and development
- 65% of respondents claim to work as much as their male colleagues while only 9% said that their work hours are less than their male counterparts.
- However, when it comes to salary only 46% perceive that they are at par with their male counterparts, while 34% feel that they get paid less. This perception varies by region where in North African countries like Algeria & Tunisia - majority feel at par with male colleagues, in GCC countries like UAE & KSA - females perceive that they are paid less than males.
- Similar trend but with lesser skew is observed for promotions & career progression, where 29% perceive to have lower chance of being promoted than their male counter parts and 57% feel its purely on basis of performance. Similar to salary trends, more females in Algeria, Lebanon and Tunisia feel its entirely based on performance while in KSA & UAE it's the other way around.

Summary and key results (3/5)

- Majority of the females (60%) said their company doesn't provide any special benefits to women per se with exception to Lebanon & Tunisia where they claim to have some additional benefits over male counterparts

Employee welfare & fringe benefits

- Personal health insurance (47%), Paid maternity leave (40%) and Transport allowance/ assistance (34%) are the top 3 additional benefits provided by the employers.
- Although majority said that they get maternity leave, only 11 % expressed their satisfaction with the duration of leave with 27% expressing low levels of satisfaction.
- Half of the respondents surveyed (50%) claim that their company doesn't provide any paternity leave.

Summary and key results (4/5)

Work life balance & future challenges

- Lack of good opportunities (57%), inability to upgrade professional skill set (41%), limited time for relaxation & socializing (36%), Concerns about healthy lifestyle (34%) and having a hard time motivating oneself to set personal goals (27%) are the top 5 challenges working women face currently in their life.
- When it comes to professional challenges, “Less opportunity for promotions” – 44%, “Stressful work environment” – 37%, “Insufficient training & coaching” – 30%, “Lack of job security” - 29% and “Lack of flexible work timings” - 27% tops the list.
- Success in their career (49%) followed by a healthy lifestyle (42%) and travelling (36%) are the top drivers of respondents’ happiness.
- Majority (52%) of unmarried working women feel that their future marriage plan will affect their career choices. While those who are already married, 36% feel that their marital life has been positively impacted by their career choice while 19% said it had a negative impact. While among those who have kids, 54% feels that their decision to have children had impacted their career to a smaller or larger extent.

Summary and key results (5/5)

Familiarity with Government policies

- 40% working women are very familiar and 50% are somewhat familiar with the labor laws of the country in which they work. Familiarity with laws is highest in Tunisia (54%) followed by Oman (49%) while being lowest in Egypt (30%)
- Overall, 22% of respondents reported that the labor laws are fair to women to a large extent and 55% said that they are fair to some extent. This perception is highest in Oman (41%) while its low in Egypt (12%) and Lebanon (7%).

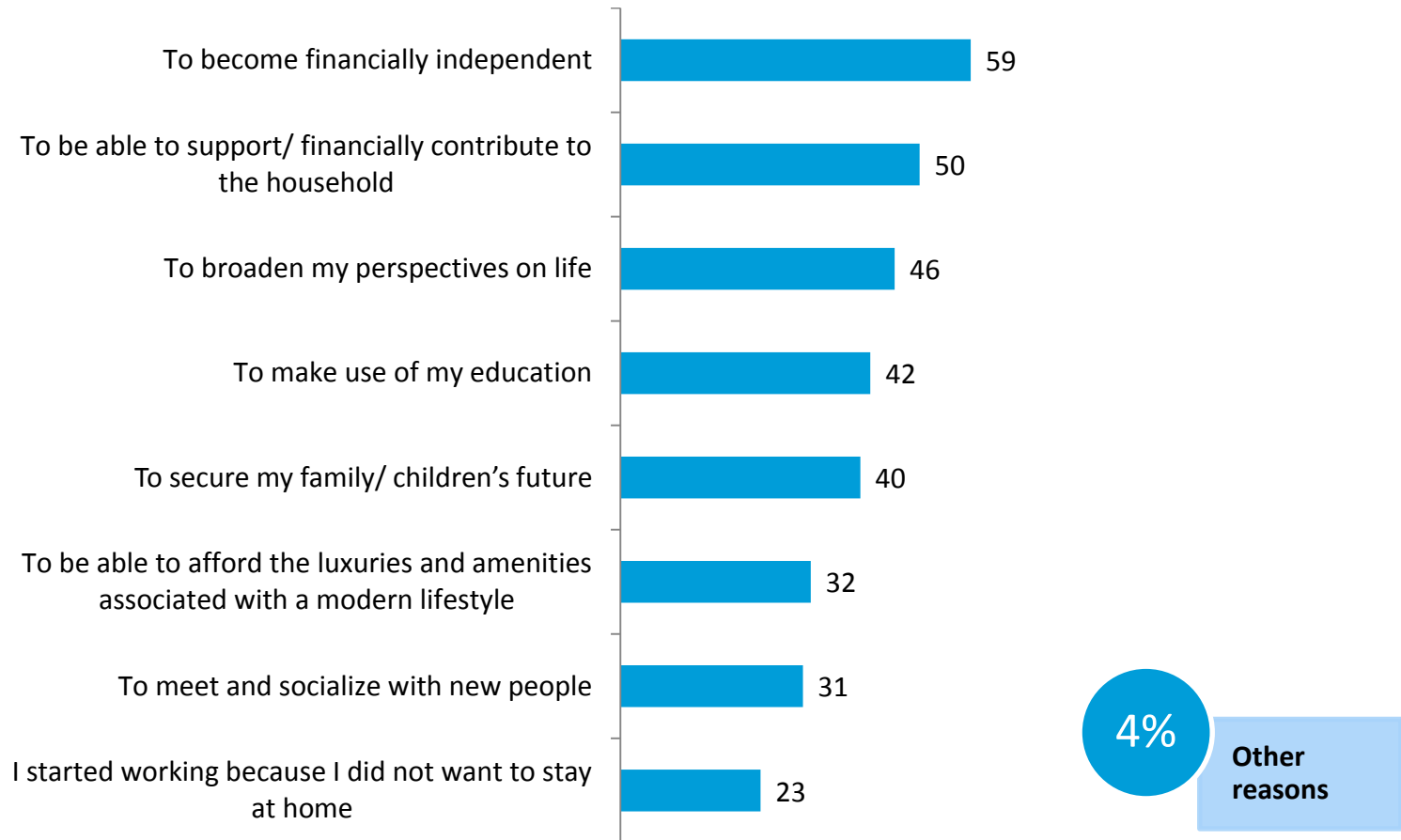


Section 4

RESEARCH FINDINGS

Reasons for seeking employment

Top 3 reasons women seek employment in this region are financial independence (59%), to be able to support / financially contribute to the household (50%) and to broaden perspectives on life (46%)



Q. People like you have cited various reasons for seeking employment. Please select all those that apply to you.

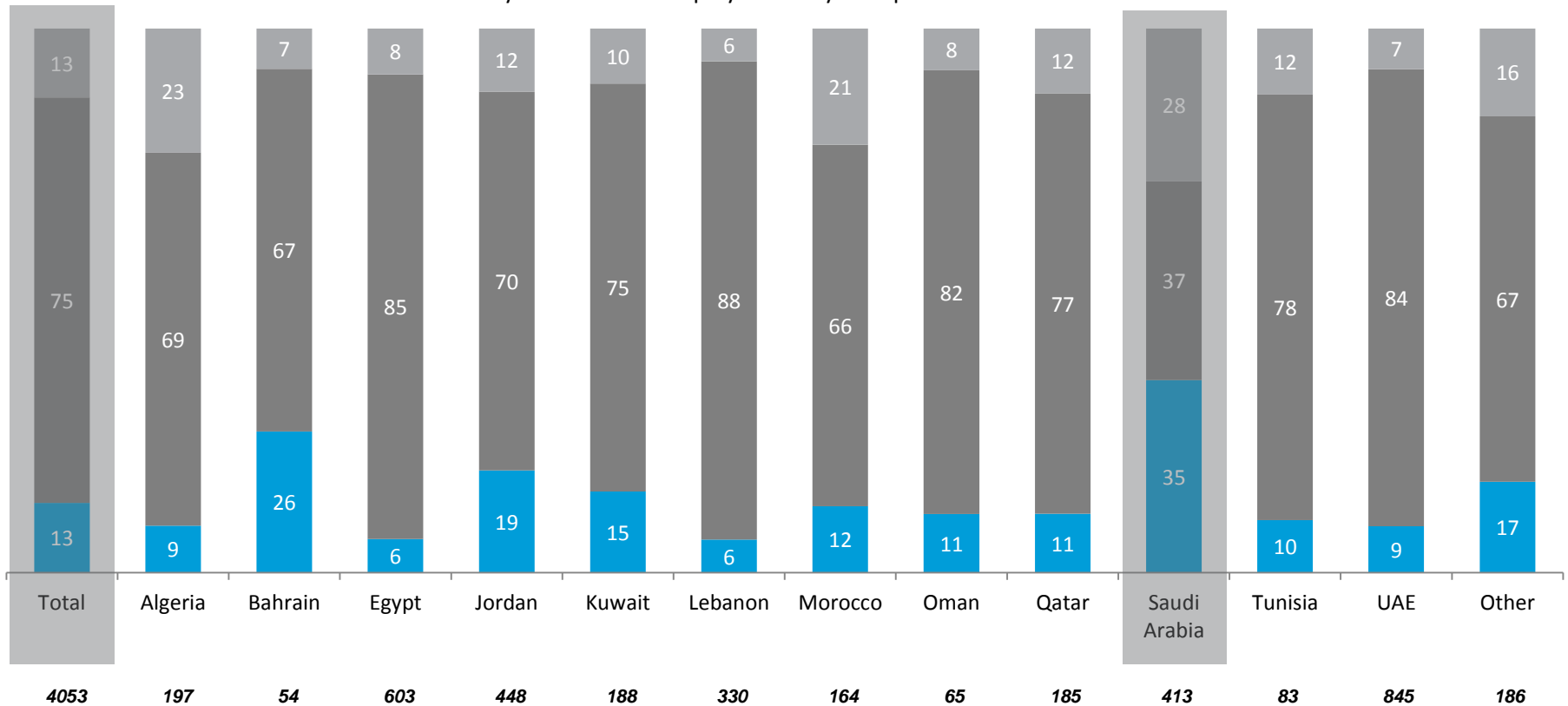
Fig in %

Base: All respondents (n=4053)

Workplace gender segregation

The large majority of respondents (75%) reported having a mix of men and women working together in the same workplace. Significantly more respondents in KSA stated that they work in female only workplaces (35%) or in a workplace with the genders segregated (28%)

- We have a mix of men and women at the work place but in separate sections
- We have a mix of men and women working in the same workplace
- We only have women employees in my workplace



Q. Which of the following best describes your workplace

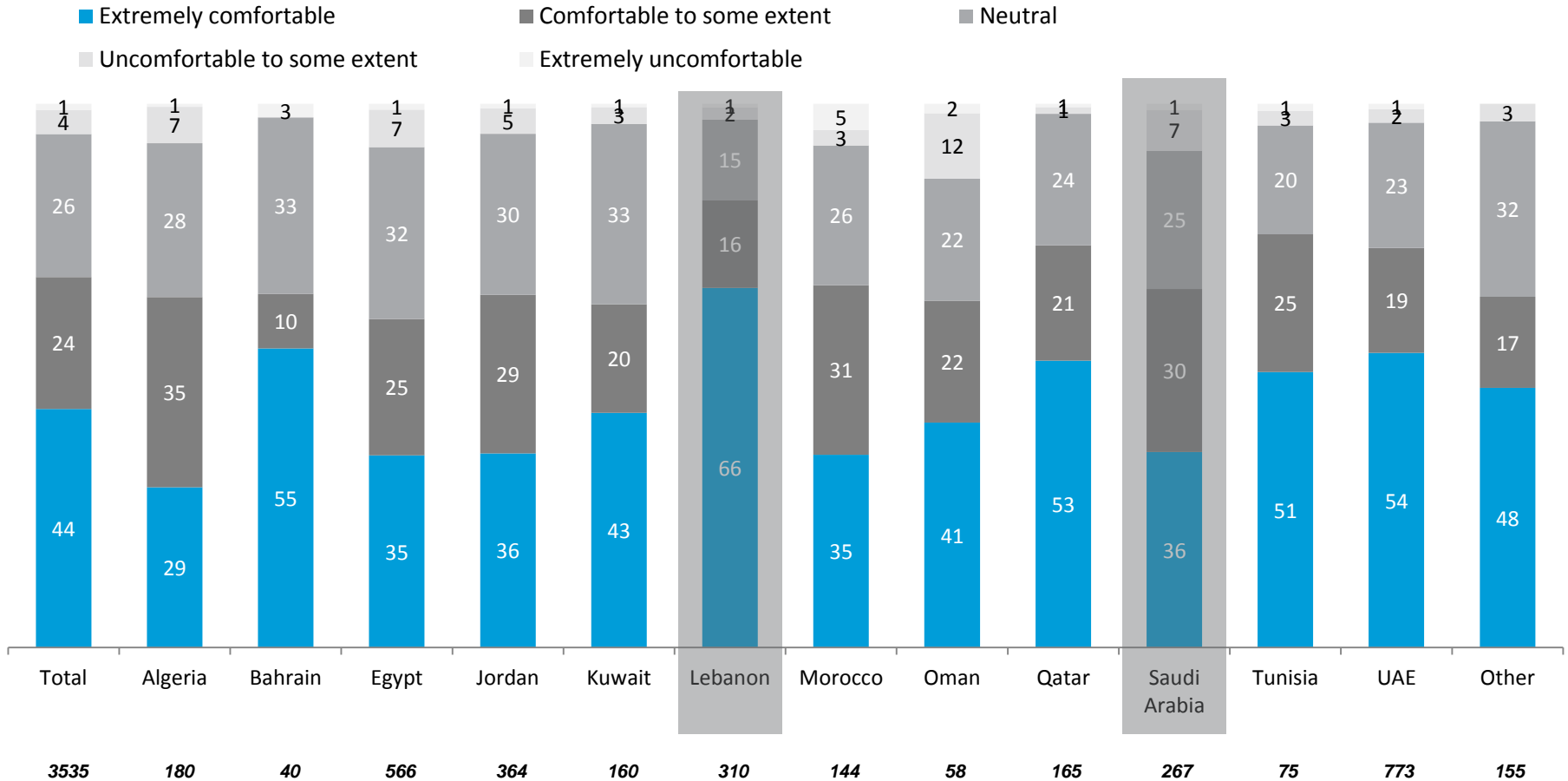
Fig in %

Base: All respondents

** Low base, Interpret with caution

Comfort level working in a mixed gender environment

Overall, majority (68%) of women who work in a mixed gender environment are comfortable with this, with two – fifths of all respondents (44%) reporting that they are extremely comfortable in a mixed – gender environment. Only a small number of respondents (5%) are uncomfortable with mixed – gender environments.



Q. How comfortable are you working in a mixed gender environment?

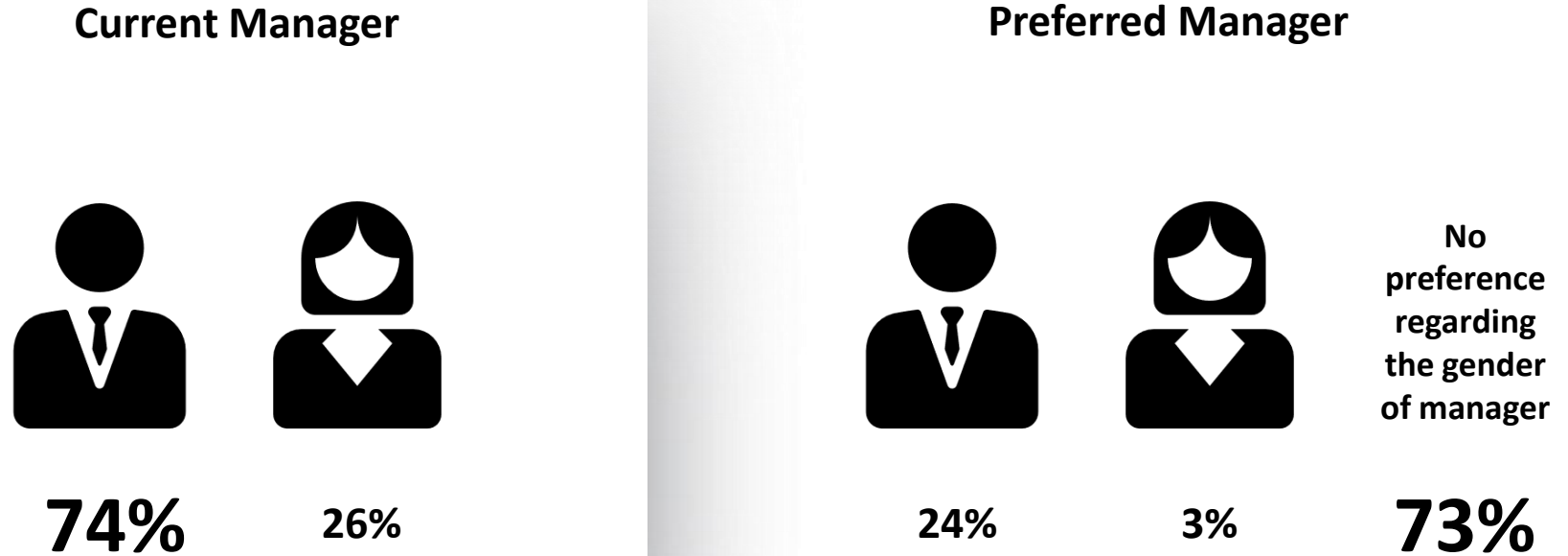
** Low base, Interpret with caution

Fig in %

Base: All respondents who said they have mix of men and women working in their workplace as well as those working in same workplace but in separate sections

Current work place gender scenario

74% of respondents working in a mixed – gender environment report having a male manager at their current organization. Two – thirds (73%) of respondents have no gender – based preference for a manager.



Q. Your current manager is?

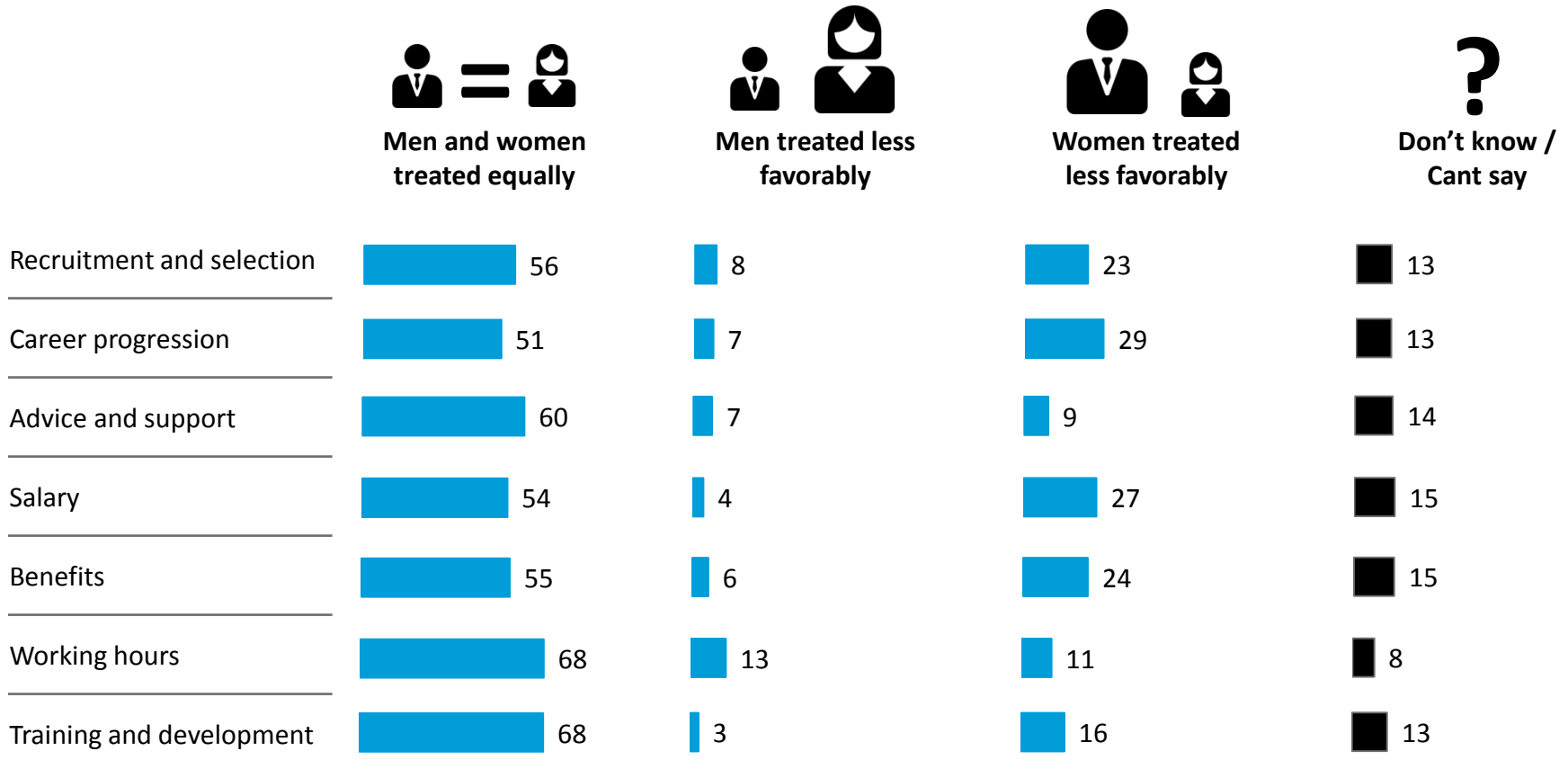
Q. Would you prefer your manager to be?

Fig in %

Base: All respondents who said they have mix of men and women working in their workplace as well as those working in same workplace but in separate sections - 3535

Treatment of men vs. women at workplace

Overall, the majority of respondents believed women and men are treated equally in the workplace across a variety of areas, including working hours, training and development, advice and support, recruitment and selection and benefits. However, 1 in every 4 respondents believe women are treated less favorably in terms of career progression, salary and benefits that they receive.



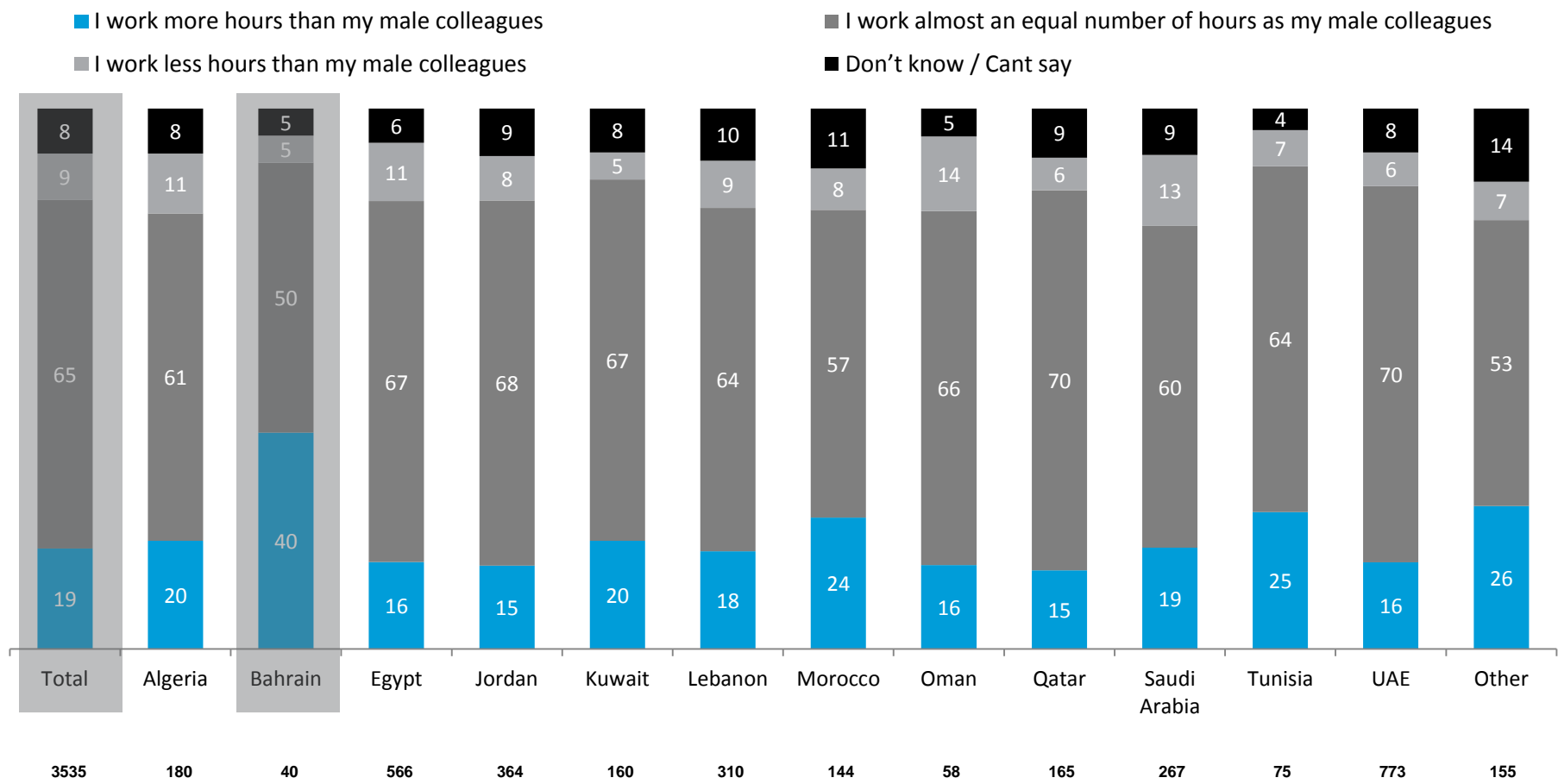
Q. Based on your experience, do you feel men and women in your workplace are treated equally in the following areas?

Fig in %

Base: All respondents who said they have mix of men and women working in their workplace as well as those working in same workplace but in separate sections - 3535

Comparison of work hours

In line with the overall feeling of workplace equality, the majority of the respondents (65%) reported working the same number of hours as male colleagues, while almost one in five (22%) reported working more hours than male colleagues.



Base: 3535, 180, 40, 566, 364, 160, 310, 144, 58, 165, 267, 75, 773, 155

Q. When it comes to working hours, which of the following statements best applies to you:

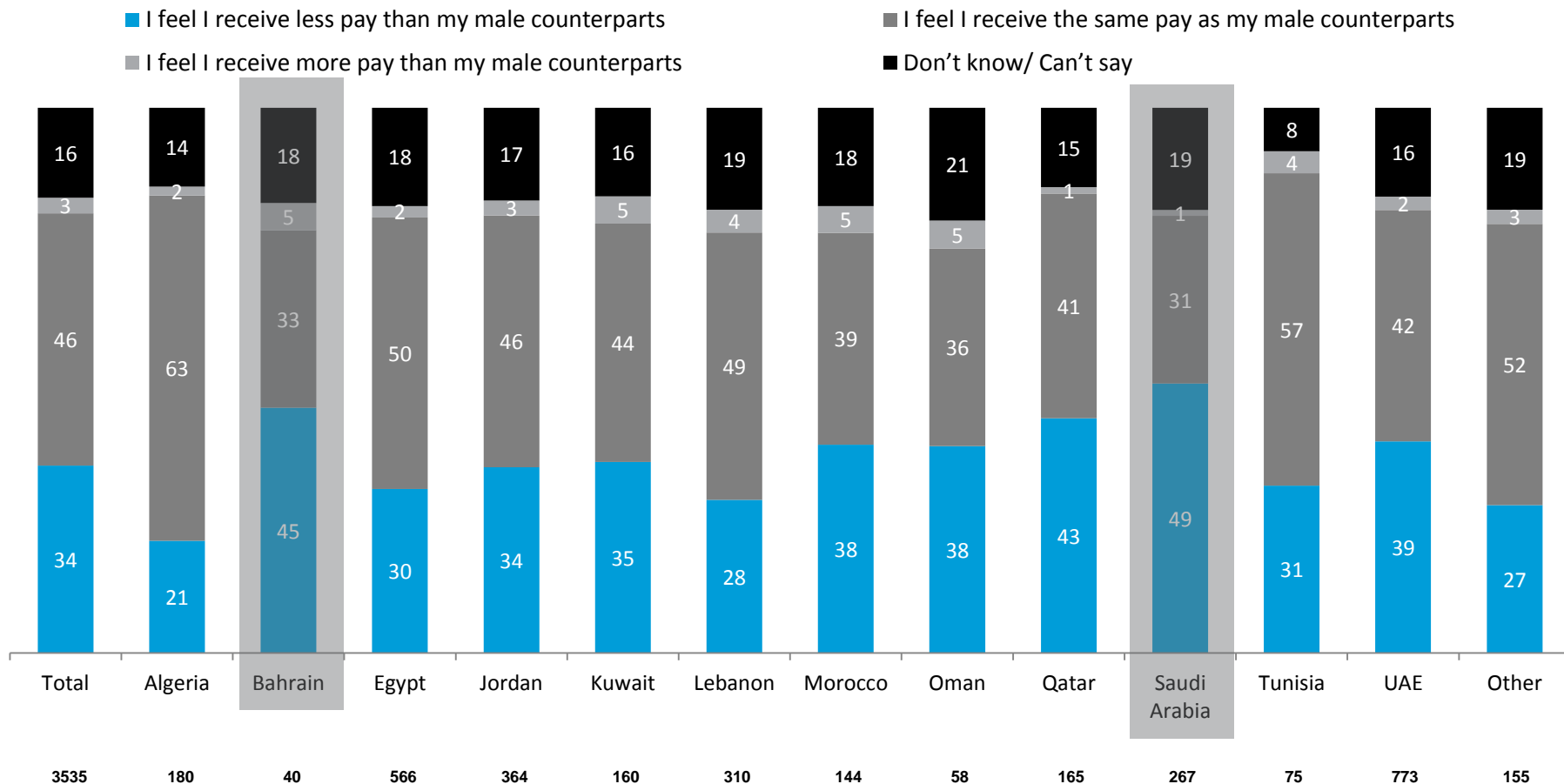
** Low base, Interpret with caution

Fig in %

Base: All respondents who said they have mix of men and women working in their workplace as well as those working in same workplace but in separate sections

Comparison of salary to male colleagues in similar position

Compared to 2016, it is interesting to note that the proportion of women surveyed who feel they receive less pay than male counterparts has come down to 34% from 50% in 2016 (Highest in KSA - 49%, though this too has reduced from 68% last year), compared to 46% who feel they receive the same. Only 3% of respondents feel they receive more pay than male counterparts.



Base

Q. How do you feel your salary compares to those of your male colleagues in a similar position?

** Low base, Interpret with caution

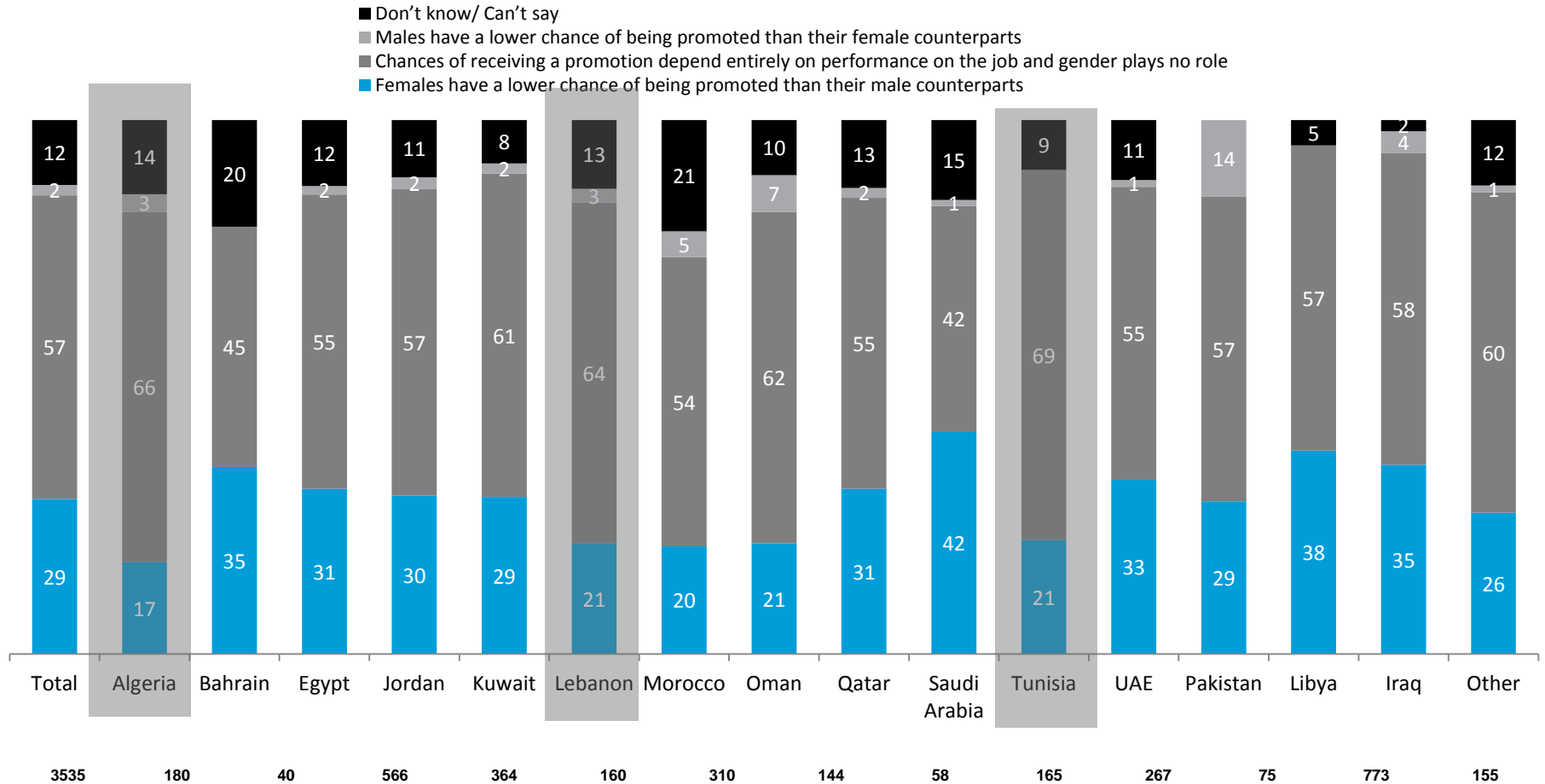
Fig in %

Base: All respondents who said they have mix of men and women working in their workplace as well as those working in same workplace but in separate sections

Comparison of promotions and career growth

29% of respondents believe women have lower chance of being promoted, while more than half of women surveyed (57%) believe promotions depend entirely on job performance and gender plays no role.

Women in Tunisia, Algeria, Lebanon and Morocco were more likely to feel that gender plays no role in promotion decisions.



Q. When it comes to promotions and career growth, which of the following statements best applies to your organization?

Fig in %

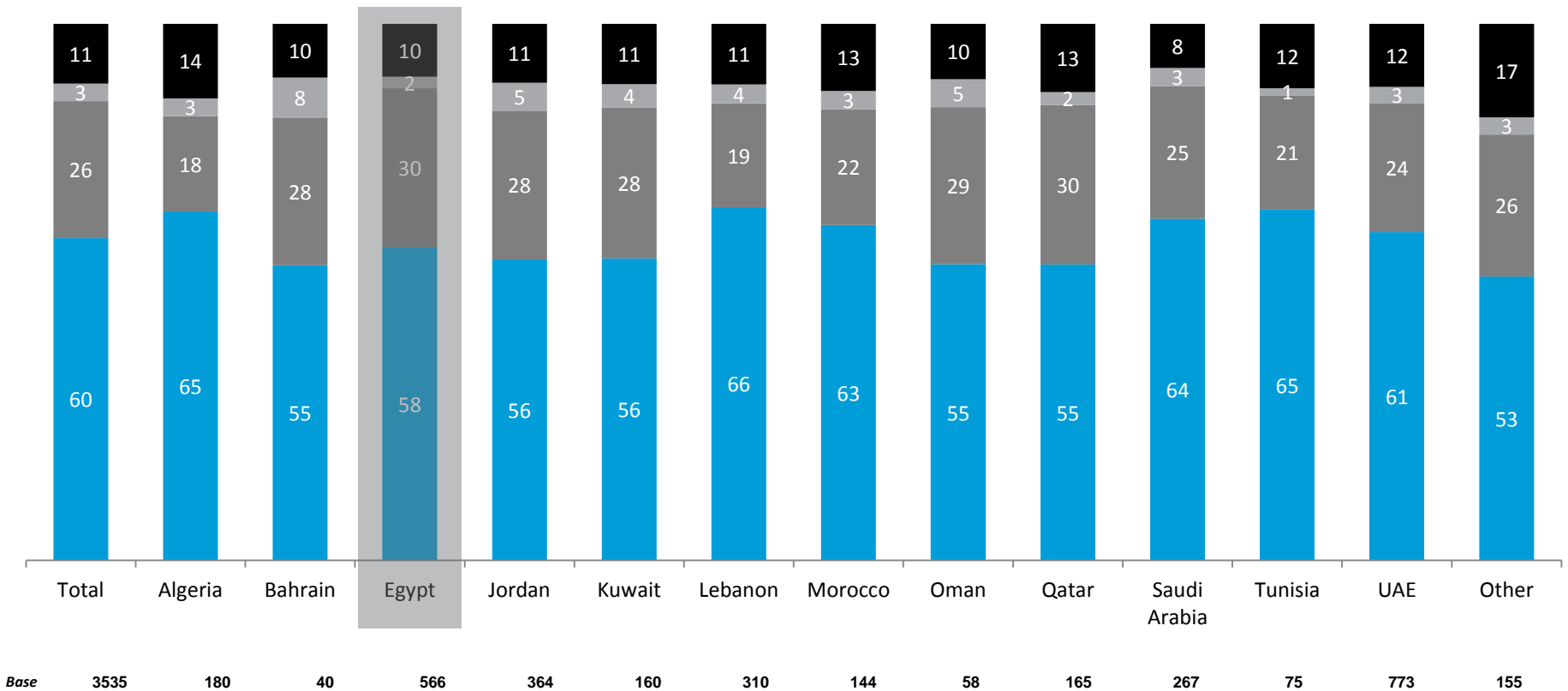
** Low base, Interpret with caution

Base: All respondents who said they have mix of men and women working in their workplace as well as those working in same workplace but in separate sections

Special benefits for women employees!

The majority of respondents (60%) claim their employer provides no special benefits for women employees. However, respondents in Egypt (30%) are the most to say women employees receive some special benefits. Interestingly, women in Bahrain (8%) are more likely to claim that they receive many special benefits.

- There are no special benefits for women employees
- There are some special benefits for women employees
- There are many special benefits for women employees
- Don't know/ Can't say



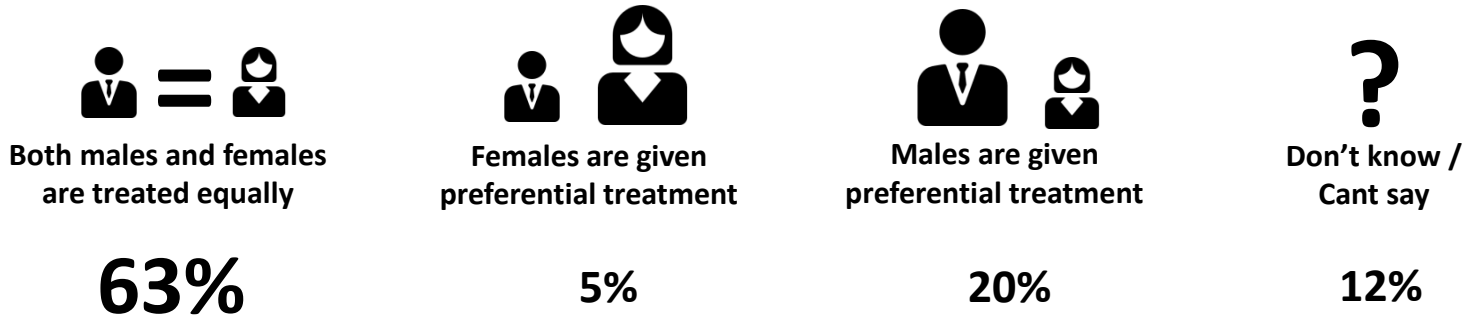
Q. Does your current employer provide any special benefits for women employees?

** Low base, Interpret with caution

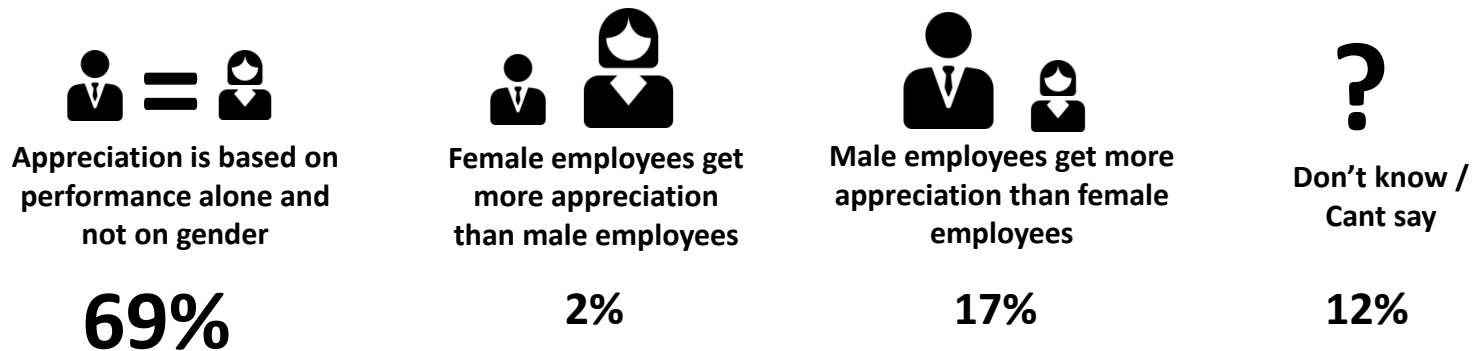
Fig in %

Base: All respondents who said they have mix of men and women working in their workplace as well as those working in same workplace but in separate sections

Perception of equality among male and female employee in the organization



System of appreciation, recognition or rewards in the organization



Q. Which of the following statements describe your perception of equality among male and female employees in your organization?

Q. In your opinion, which of the following best describes the system of appreciation, recognition or rewards in your organization?

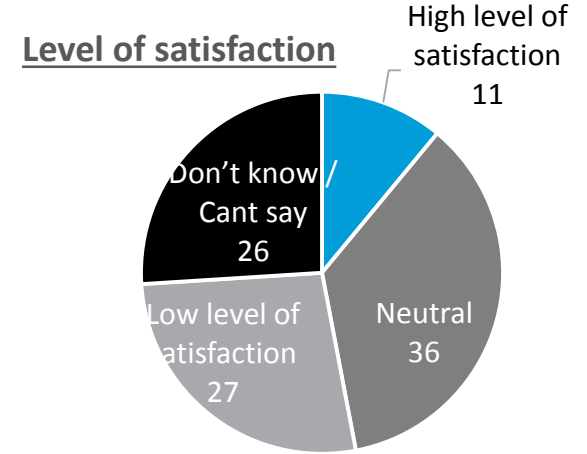
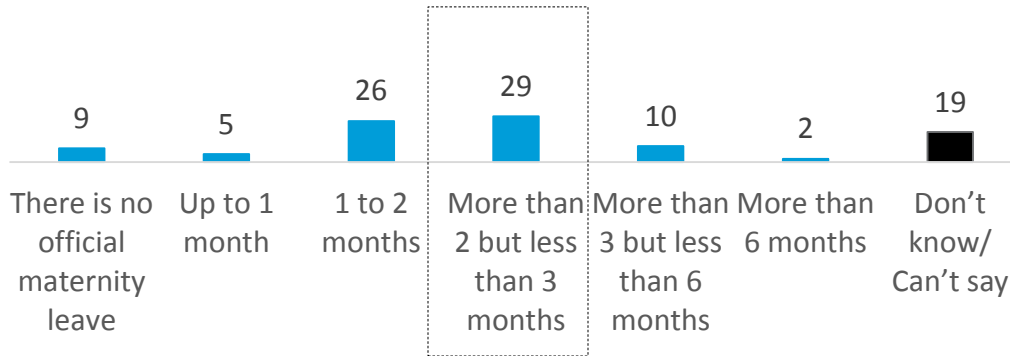
Fig in %

Base: All respondents who said they have mix of men and women working in their workplace as well as those working in same workplace but in separate sections - 3535

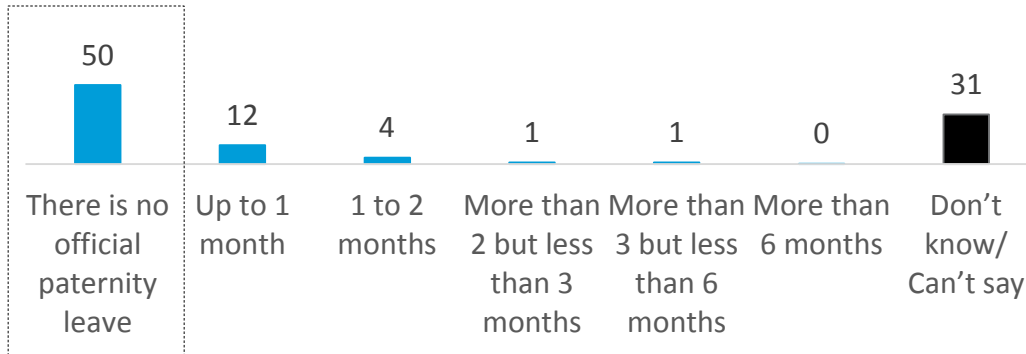
Maternity leave in the organization

Most women reported their organization gives between 2 to 3 months official maternity leave. However, when asked about their satisfaction level, only 11% were highly satisfied.

On the other hand, 50% reported their company does not offer paternity leave to males.



Paternity leave in the organization



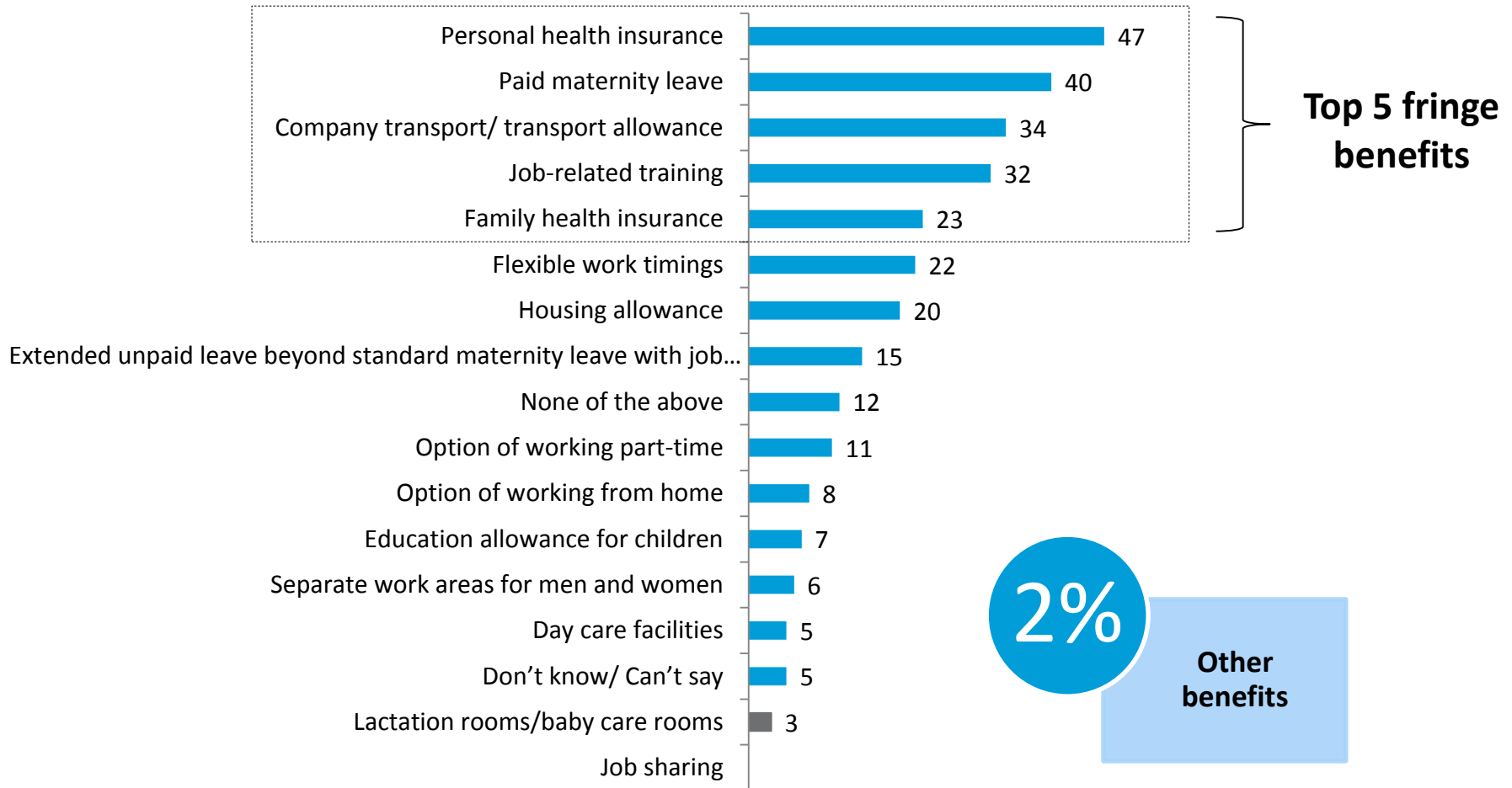
Q. How many months of official maternity leave are women granted in your organization? Base: All respondents - 4053

Q. How would you rate your satisfaction with the maternity leave and benefits available in your current job? Base: All respondents - 4053 Fig in %

Q. How many months of official paternity leave are men granted in your organization? Base: All respondents - 3535

Various fringe benefits provided by the company

Respondents report receiving a variety of company benefits: Personal health insurance (47%), Paid maternity leave (40%), Company transport / transport allowance (34%), Job – related training (32%) and Family Health Insurance (23%) being the most prevalent.



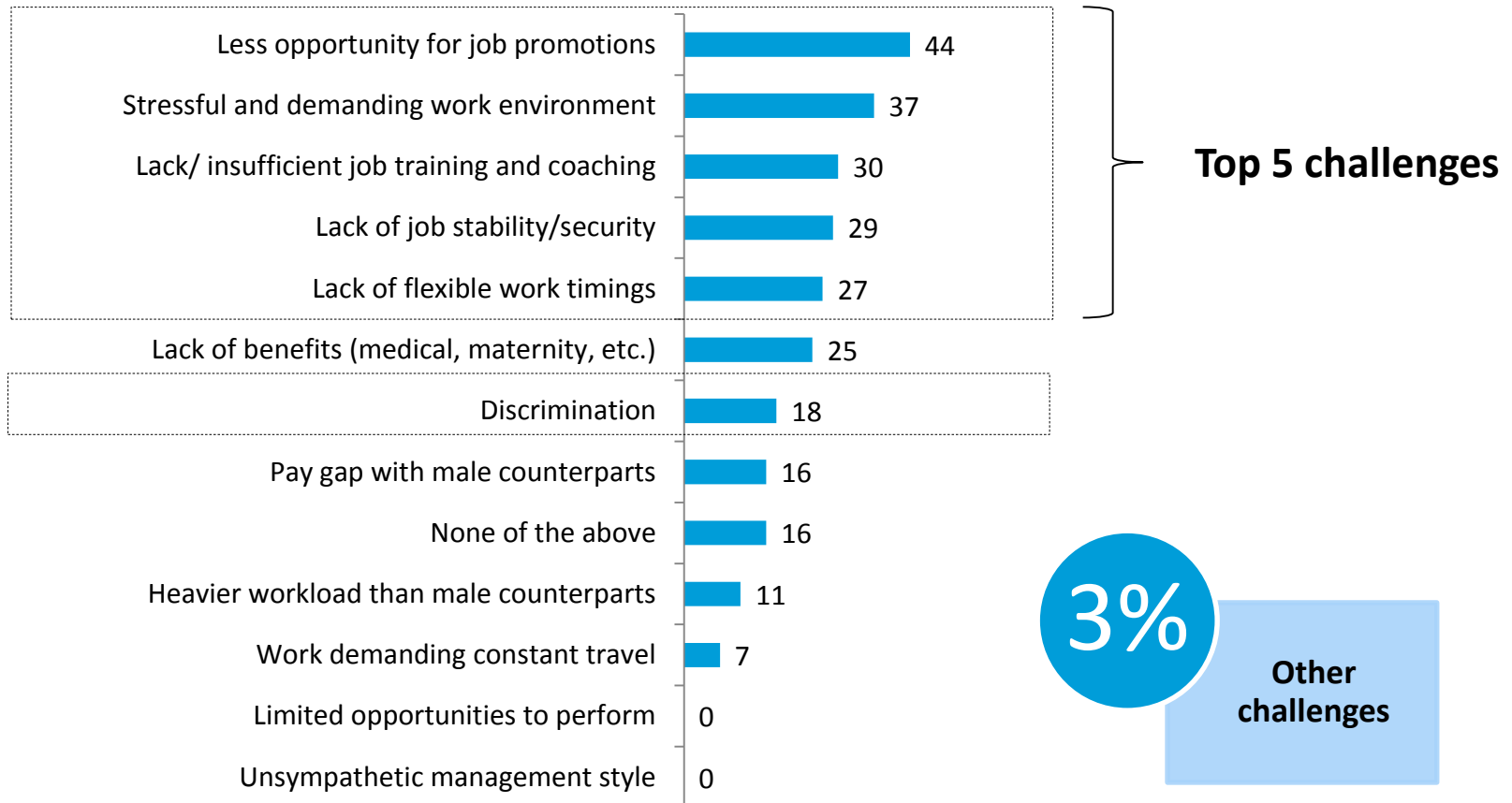
Q. Which of the following does your company provide you with? (Select all that apply)

Fig in %

Base: All respondents (n=4053)

Various challenges women face in their work environment

Less opportunity for job promotions (44%), stressful and demanding work environment (37%), Lack / insufficient job training and coaching (30%), Lack of job stability / security (29%) and Lack of flexible work timings (27%) are reported to be the top 5 challenges women face in their work environment. Having said that, 18% of the respondents also reported discrimination to be one of the key challenges that they face.



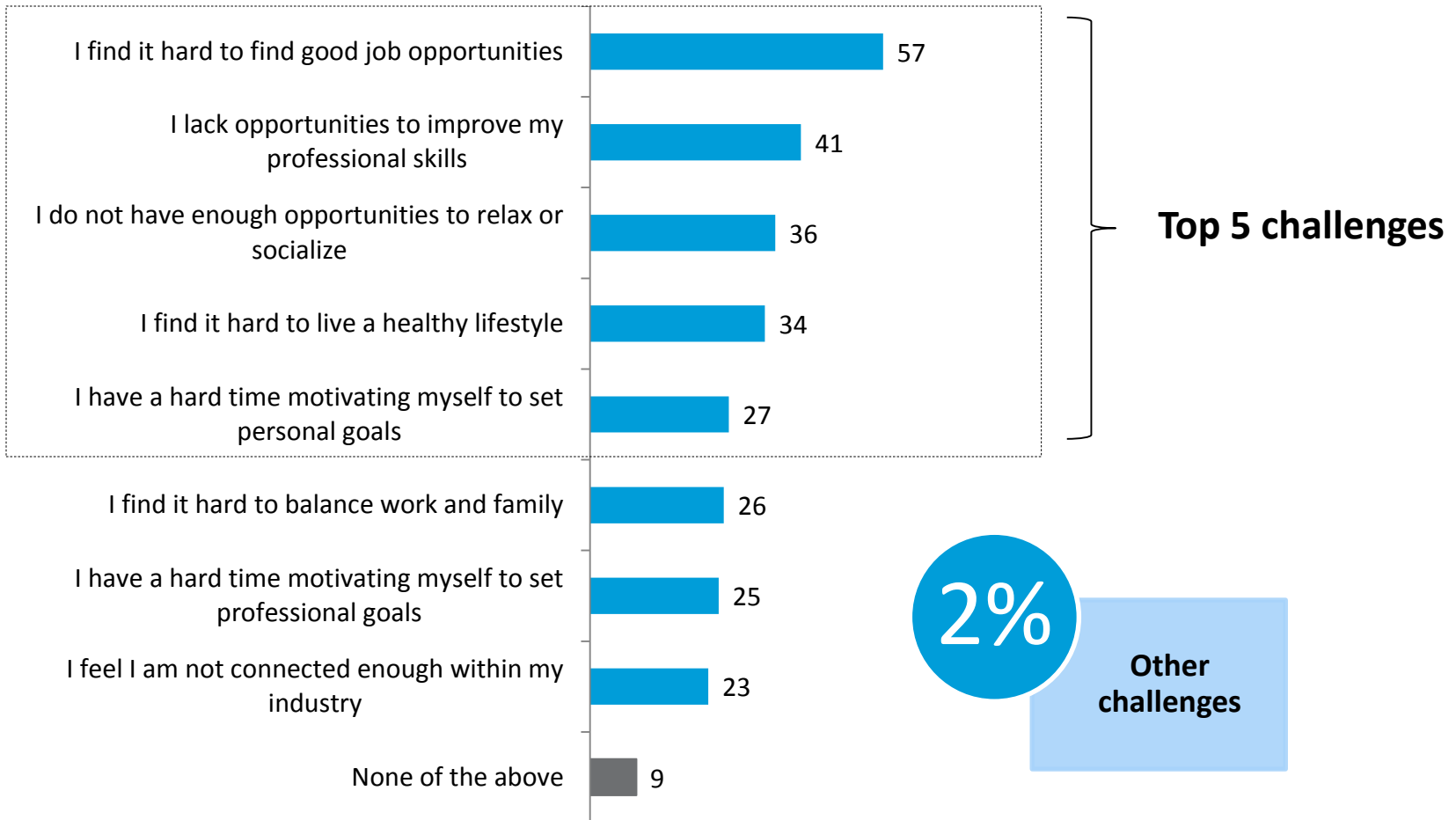
Q. As a woman, what are the challenges you face in your work environment? Please select as many as apply.

Fig in %

Base: All respondents (n=4053)

Key challenges women face in their life

When asked about key challenges in their life, difficulty in finding good job opportunities (57%), lack of opportunities to improve their professional skills (41%), not having enough opportunities to relax or socialize (36%), difficulty to live a healthy lifestyle (34%) and difficulty in motivating the self to set personal goals (27%) emerged as top 5.



Q. And what are the key challenges you face in your life? Please select as many as apply.

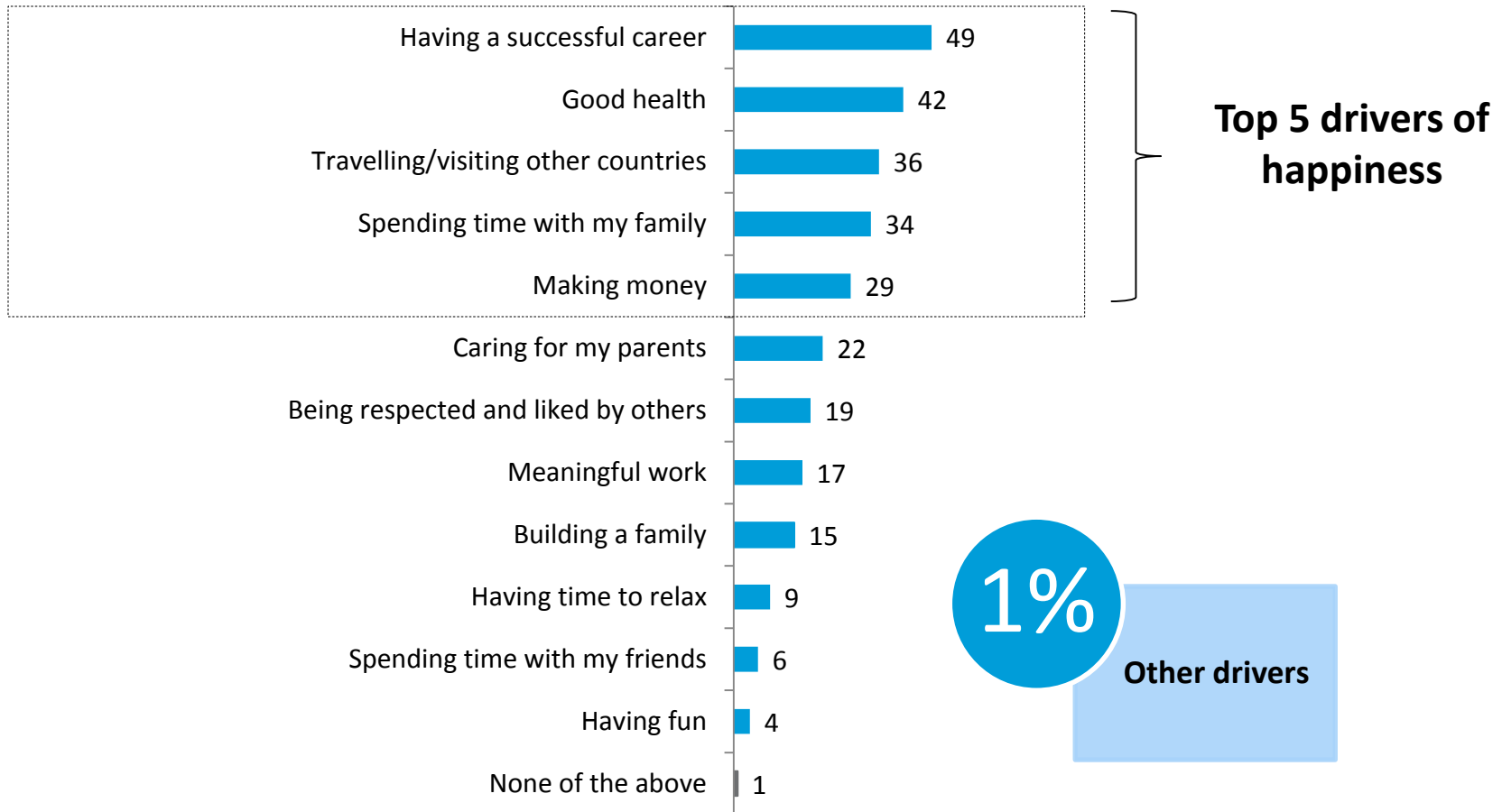
Fig in %

Base: All respondents (n=4053)

Drivers of happiness

Results highlight the importance of career for many working women across the region, with 'having a successful career' emerging as the main source of happiness (49%).

Having said that, maintaining a good health is also critical to them, with 42% selecting 'good health' as the second most important source of happiness, followed by travelling / visiting other countries (36%).



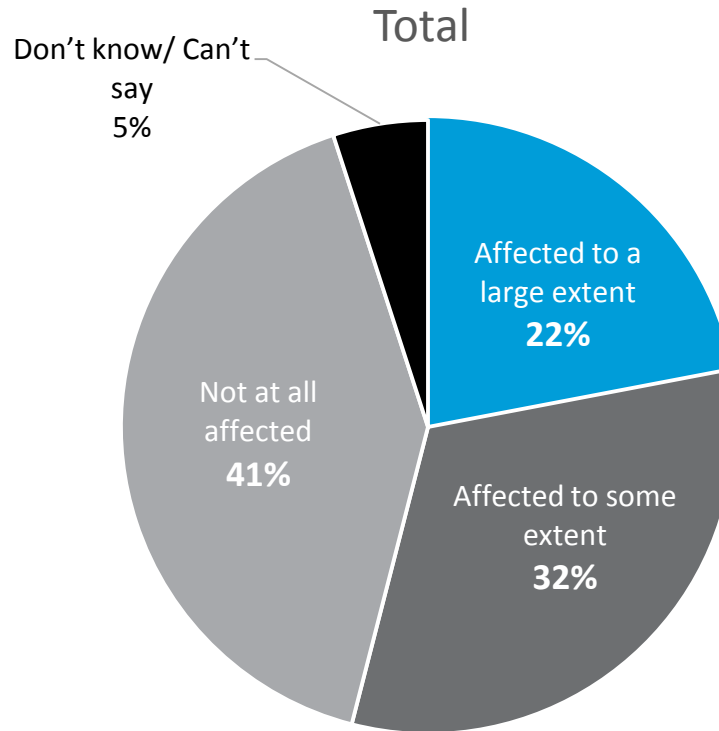
Q. What would make you feel happy in your life? Please select up to three of the following that would bring you the most happiness.

Fig in %

Base: All respondents (n=4053)

Impact of having children on women's career

54% of respondents with children stated that their decision to have children has affected their career, at least to some extent. 41% do not believe that their career was affected at all by having children.



Q. To what extent has your decision to have children affected your career?

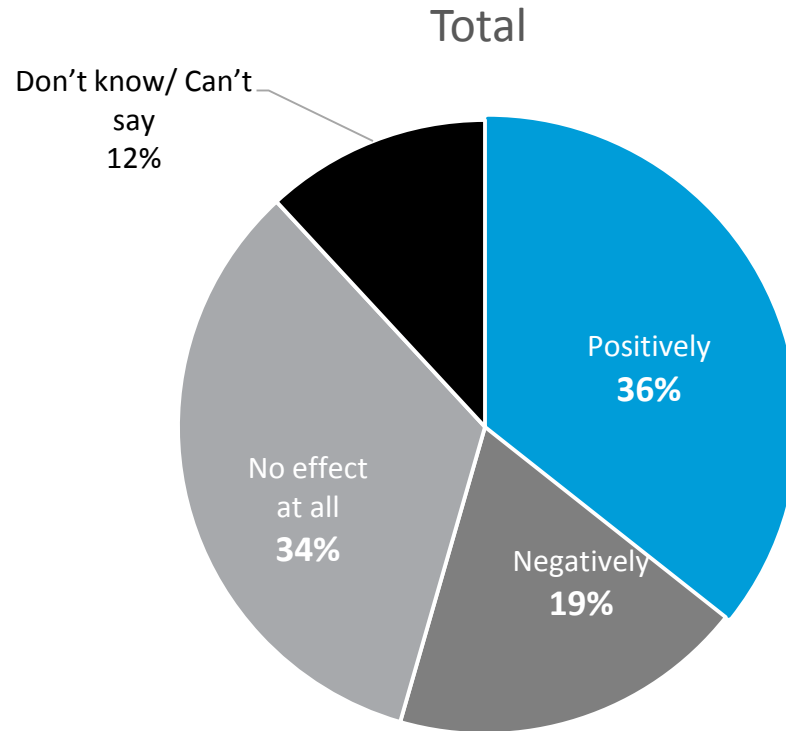
Fig in %

Base: All those with children - 1696

Influence of career choices on marital life

The majority of respondents indicated that their career choices had either a positive effect (36%) or no effect (34%) on their marital life.

On the other hand, almost 1 in 5 married women reported that their marital life has been negatively affected by the career choices (19%)



Q. In what way has your marital life been affected by your career choices?

Fig in %

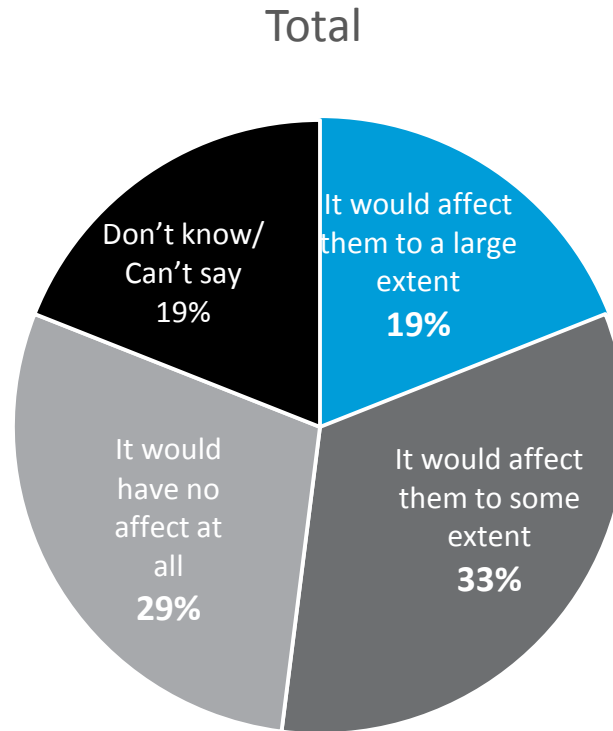
** Low base, Interpret with caution

Base: All those who are married - 1696



Impact of future marriage plans on career

Over half (52%) of those surveyed believe their future marriage plans would affect their career choices, at least to some extent. While, 29% believe these plans will not affect their career choices.



Q. In your opinion to what extent would your future marriage plans affect your career choices?

Fig in %

Base: All those who are either single / never married - 1963

Top 3 benefits most important for working women

Overall, the majority (57%) of respondents selected a higher salary as the most important benefit, one third (35%) stated that opportunities for long term career growth were also very important to them as were the flexible working hours (26%) and Health Insurance for the whole family (26%).

Less travel and separate work areas for men and women appear to be significantly less important.



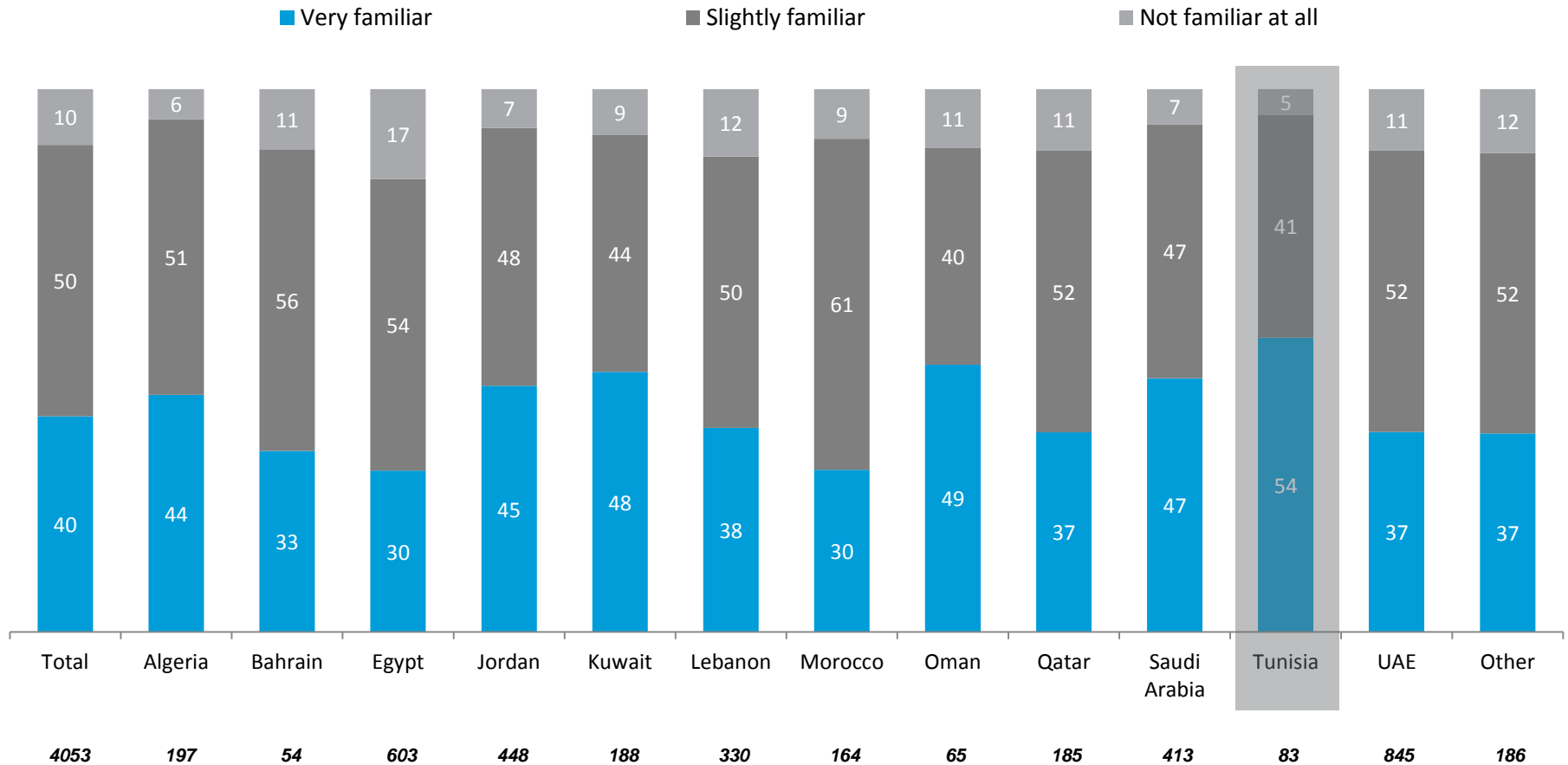
Q. As a working woman, which THREE of the following benefits are most important to you? (Please select 3 answers)

Fig in %

Base: All respondents (n=4053)

Familiarity with labor laws of the country

Almost all (90%) respondents stated they have some familiarity with the labor laws of their country of residence, with two fifths (40%) claiming to be very familiar.



Q. How familiar are you with the labor laws of the country in which you work?

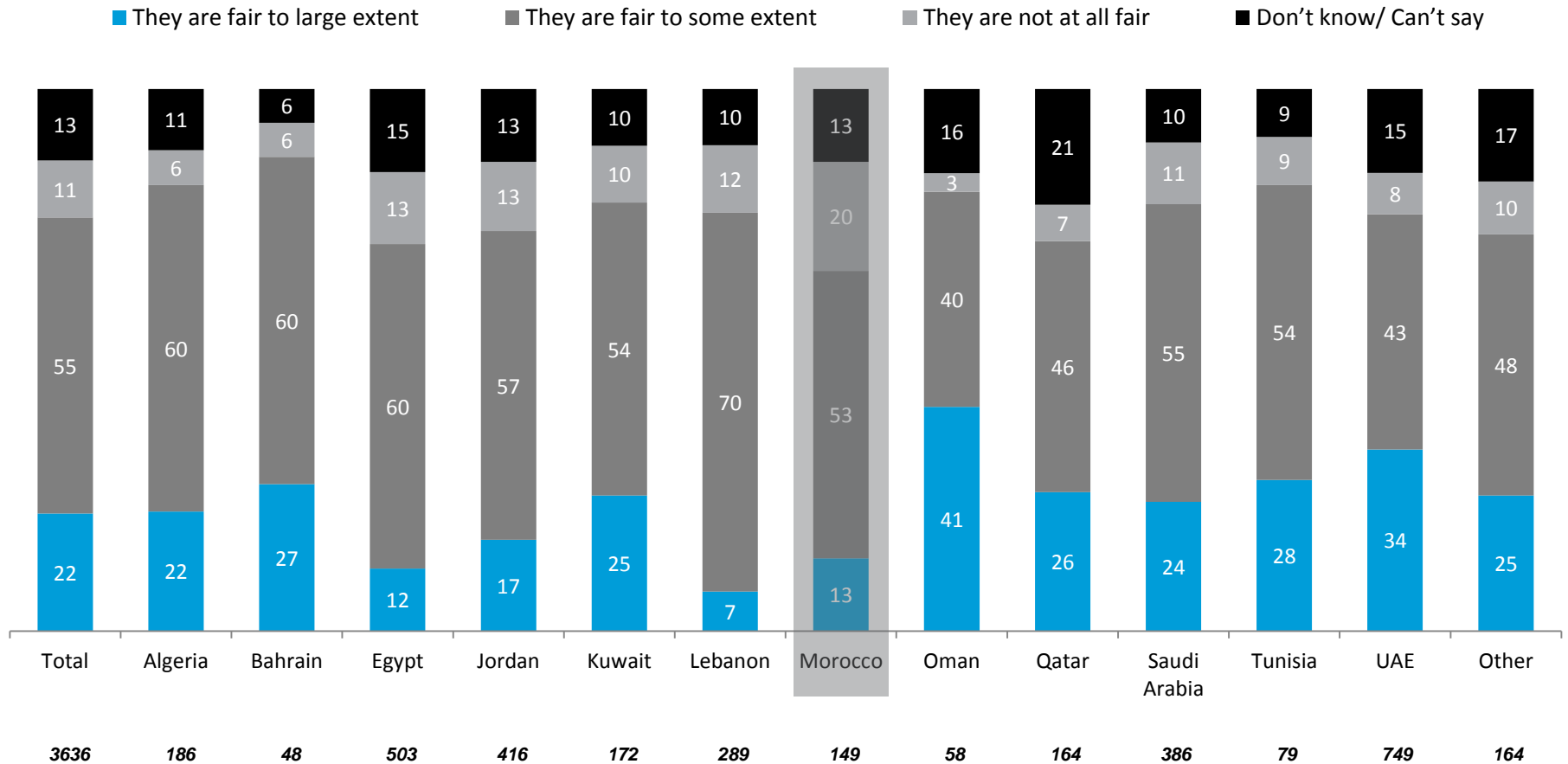
** Low base, Interpret with caution

Fig in %

Base: All respondents

Extent to which the labor laws are fair to women

Of those who are familiar with the labor laws, about three quarters (77%) stated that they are fair to women, at least to some extent.



Q. To what extent do you think that these labor laws are fair to women?

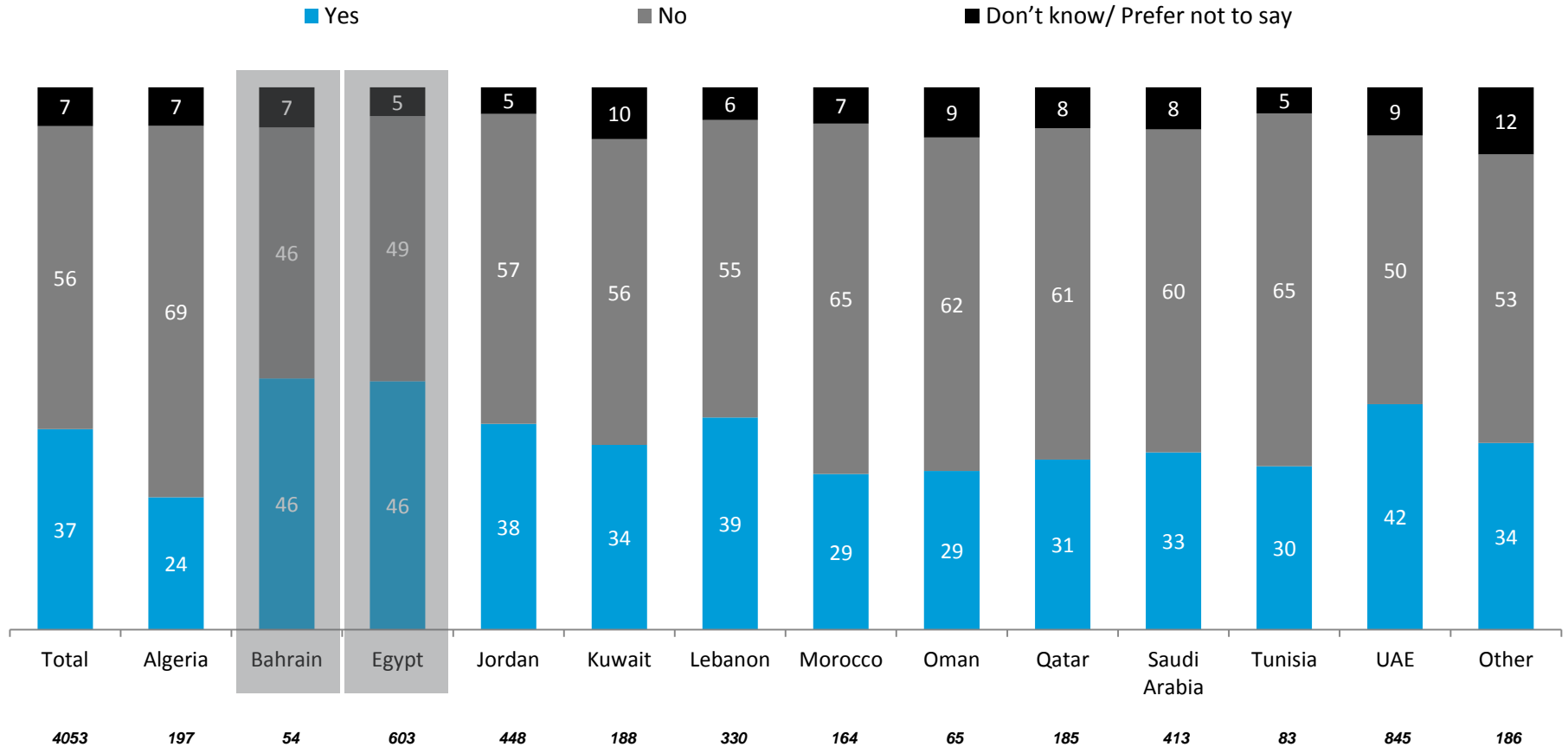
Fig in %

** Low base, Interpret with caution

Base: All those who are familiar with labor laws: 3636

Job interview discrimination among women

37% of the respondents have been asked questions in a job interview that made them feel discriminated against as women. This notion was highest in Egypt (46%) and Bahrain (46%).



Q. Have you ever been asked questions in a job interview that discriminates you as a woman? (For e.g. Are you planning to get married? Are you planning to have children?)
Fig in %

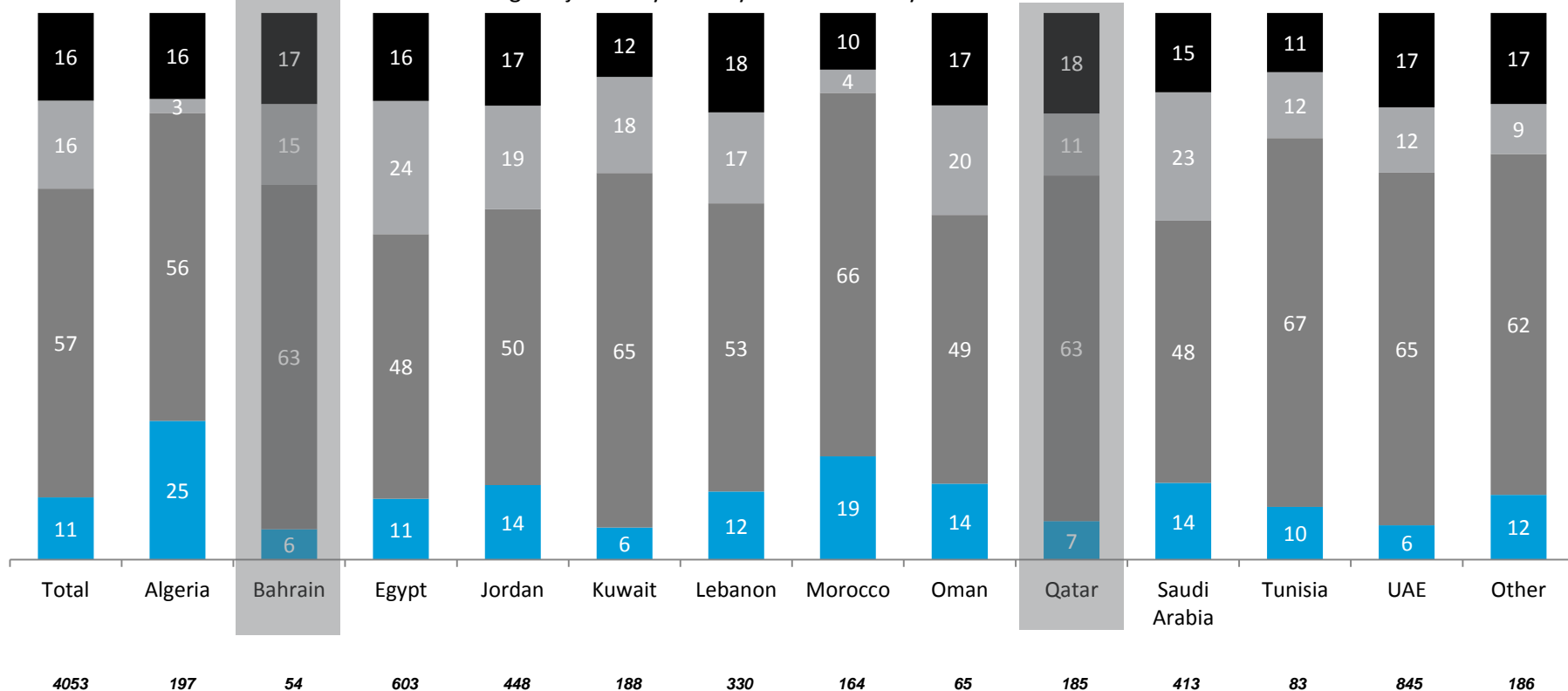
Base: All respondents

** Low base, Interpret with caution

Ease of getting job in country of residence

Majority of the respondents (57%) felt that job offers are based on experience / qualifications and gender plays no role in the decision.

- Don't know/ Can't say
- It is easier to get a job in my country of residence if you are male
- Job offers are based on experience/qualifications and gender plays no role in the decision
- It is easier to get a job in my country of residence if you are female



Base

4053 197 54 603 448 188 330 164 65 185 413 83 845 186

Q. Which of the following statements do you believe is most accurate:

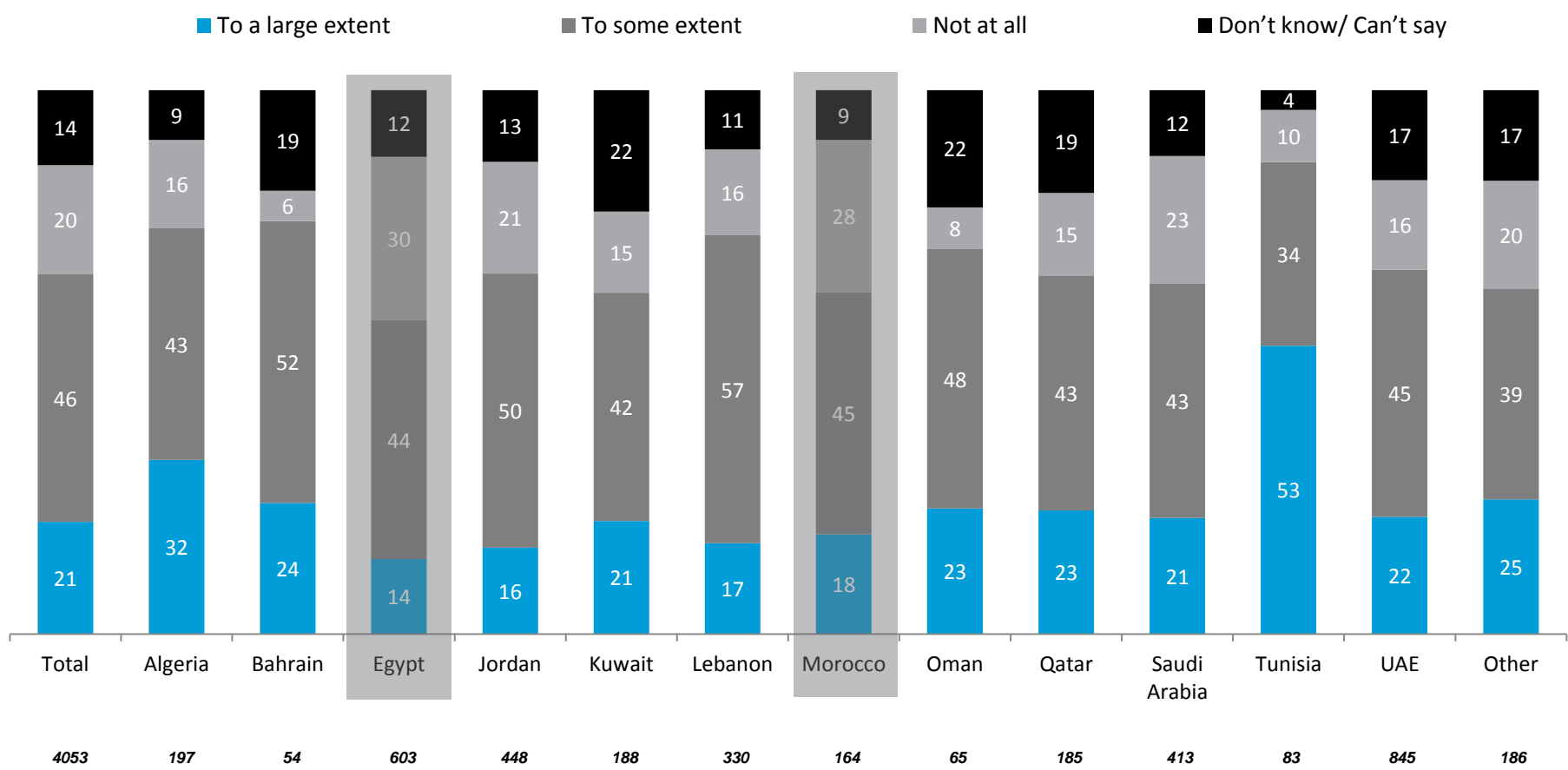
** Low base, Interpret with caution

Fig in %

Base: All respondents

Extent to which women in their country of residence reached the same level of workplace equality as western countries

67% of the respondents reported that women in their country of residence have reached the same level of workplace equality as compared to working women in western countries, at least to some extent.



Base: 4053, 197, 54, 603, 448, 188, 330, 164, 65, 185, 413, 83, 845, 186

Q. Compared to working women in Western countries, to what extent have women in your country of residence reached the same level of workplace equality?

Fig in %

Base: All respondents

** Low base, Interpret with caution



Thank you