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EMPLOYMENT INDEX

Monster Employment Index Middle East registers 11 Percent Growth in Online Recruitment Activity, Year-on-Year

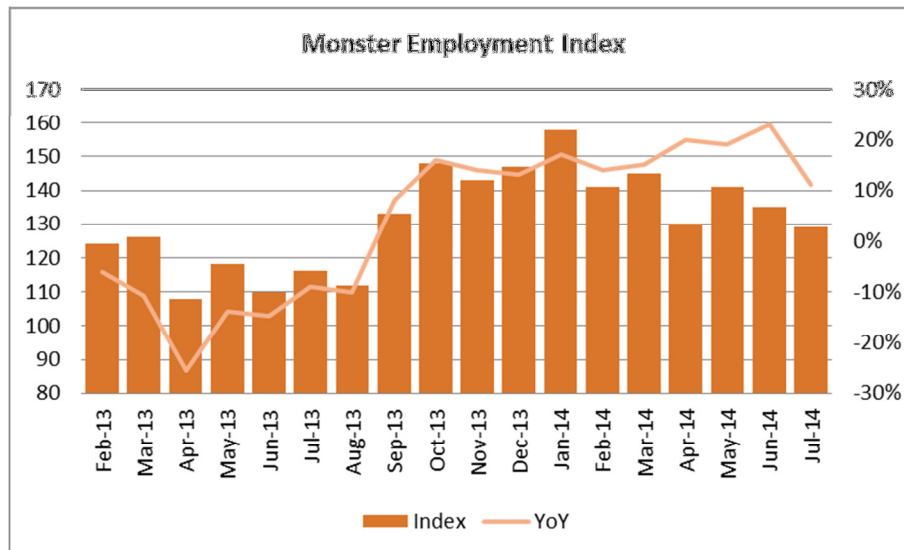
July 2014 Index Highlights

- Monster Employment Index Middle East surges 11 percent between July 2013 and 2014. The annual growth is significant despite moderation in pace of growth
- Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides industry registers the steepest growth in online recruitment year-on-year
- Online recruitment activity eased the most in Consumer Goods/ FMCG, Food & Packaged Food, Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery sector
- Hospitality and Travel witness the most notable growth in demand annually
- UAE continues to exhibit the steepest annual growth in online recruitment while Qatar is the only country to record a negative growth on the year

The Monster Employment Index is a monthly gauge of online job posting activity in Middle-East based on a real-time review of tens of thousands of employer job opportunities culled from a large representative selection of career Web sites and online job listings. The Index does not reflect the trend of any one advertiser or source, but is an aggregate measure of the change in job listings across the industry.

"Online recruitment as per the Monster Employment Index is significantly above that in the corresponding period a year ago. However, the growth momentum this month is the lowest since September 2013. The growth impetus in the region this year has been primarily driven by growth in BFSI; Retail/Trade and logistics; Hospitality; and also the Healthcare sector. The UAE continued an upward trend, with a 26 percent year-on-year growth."

"KSA edged up by eight percent between July 2013 and 2014 with Advertising, Market Research, Public Relations, Media and Entertainment charting the steepest annual growth among all industry sectors. While the Oil and Gas industry is showing a notable annual decline, the Sales and BD professionals continue to lead the way in terms of long-term growth," said **Sanjay Modi, Managing Director, Monster.com (India/ Middle- East/ South East Asia/ Hong Kong).**



Feb 13	Mar 13	Apr 13	May 13	Jun 13	Jul 13	Aug 13	Sep 13	Oct 13	Nov 13	Dec 13	Jan 14	Feb 14	Mar 14	Apr 14	May 14	Jun 14	Jul 14	Y-o-Y
124	126	108	118	110	116	112	133	148	143	147	158	141	145	130	141	135	129	11%

Industry Year-over-Year Trends: Seven of the 13 industry sectors monitored by the Index exhibited improved annual growth trends this month

- **Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides** (up 30 percent) saw the steepest growth in online recruitment, year-on-year, among all industry groups. The Index reading for the series at 92 has drawn closer to the baseline of 100 following low level since October 2013.
- **Hospitality** (up 29 percent) saw annual growth momentum ease 19 percentage points between June and July 2014. Nevertheless, online recruitment in the sector is significantly above the year-ago level. The group ranked second for the top by the way of long-term growth rate. The sector saw fewer opportunities on the month, down by 13 percent having charted steep growth the previous month.
- There has been significant growth in **Retail/Trade and Logistics** sector as well from the year-ago. The group witnessed a 10 percentage point's improvement in the pace of long-term growth; from 17 percent in June to 27 percent in July. It is notable however that online recruitment in the sector has eased much from the six month level (i.e. January 2014).
- **IT and Telecom/ISP** (down one percent) saw fewer opportunities on the year for the first time since July 2013. The index reading for the sector has hovered below the baseline since March 2014.
- Online recruitment in **Production/Manufacturing, Automotive and Ancillary** (down five percent) continues to be lower than the level attained in the corresponding period the previous year. The sector has been charting incessant negative annual growth rates since November 2012. In the **Oil and Gas** sector, online recruitment matched the year-ago level.
- Online recruitment in **Consumer Goods/ FMCG, Food & Packaged Food, Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery** dropped 20 percent from July 2013; the steepest decline among all monitored industry sectors.

Top Growth Industries

Year-over-year Growth	Jul 13	Jul 14	% Growth Y-o-Y
Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides	71	92	30%
Hospitality	125	161	29%
Retail/Trade and Logistics	112	142	27%
Health Care	116	146	26%
BFSI	121	136	12%

Lowest Growth Industries

Year-over-year Growth	Jul 13	Jul 14	% Growth Y-o-Y
Oil and Gas	90	90	0%
IT and Telecom/ISP	94	93	-1%
Production/Manufacturing, Automotive and Ancillary	93	88	-5%
Advertising, Market Research, Public Relations, Media and Entertainment	130	119	-8%
Consumer Goods/ FMCG, Food & Packaged Food, Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	108	86	-20%

Occupation Year-over-Year Trends: Online demand expanded in nine of the eleven occupation groups monitored by the Index.

- **Hospitality and Travel** (up 38 percent) charted steep growth in online demand between July 2013 and 2014. Despite moderation in pace, demand for the group has been the highest in terms of year-on-year growth.
- **Purchase / Logistics / Supply Chain** registered a sharp 23 percent growth in demand year-on-year following low levels since December 2013. The group ranked among top five in the long-term growth ladder. The group also saw a positive growth in demand on the month for the first time since February 2014. The Index reading for the series, nevertheless, continues to remain below the baseline of 100.
- Year-on-year, **Software, Hardware, and Telecom** (up one percent) has exhibited only marginal growth in demand. The sector which exhibited double-digit annual growth rates from September 2013 until April 2014 saw the rate of long term-growth ease to a one-digit level in May 2013. Online demand for the group has stayed close to the year-ago level since then.
- **Health Care** (up 20 percent); and **Engineering and Production** (up 12 percent) aside all occupation groups monitored by the Index saw the rate of growth of long-term demand ease between June and July 2014.
- **Legal** (down three percent); and **Customer Service** (down eight percent) are the only groups to exhibit a negative annual growth. It is notable, while Customer Service continues to chart the steepest annual decline among all occupation groups, the growth momentum has improved from a negative 29 percent in June 2014 to a negative eight percent in July 2014.

Top Growth Occupations

Year-over-year Growth	Jul 13	Jul 14	% Growth Y-o-y
Hospitality and Travel	120	165	38%
Health Care	119	155	30%
Purchase / Logistics / Supply Chain	79	97	23%
Marketing & Communications/Arts/Creative	127	155	22%
Finance and Account	105	127	21%

Lowest Growth Occupations

Year-over-year Growth	Jul 13	Jul 14	% Growth Y-o-y
Engineering and Production	117	131	12%
HR & Admin.	117	130	11%
Software, Hardware, Telecom	109	110	1%
Legal	97	94	-3%
Customer service	73	67	-8%

Geographic Year-over-year Trends: Online job availability improved in six of the seven countries monitored by the Index.

- **UAE** (up 26 percent) registered the most notable growth in online opportunities, year-on-year, among all monitored countries yet again. This is the third positive growth in succession following fourteen months of slump. UAE also registered a marginal one percent growth from June 2014 and was the only country to witness a positive growth on the month.
- **KSA** (up eight percent) saw further improvement in the long-term growth momentum while online recruitment in **Bahrain** exceeded the year ago level by marginal one percent. The growth momentum in **Egypt** slowed this month. Online recruitment in Egypt surpassed the year-ago level by three percent; the first single-digit annual growth in 14 months.
- **Qatar** is the only country to exhibit a negative annual growth even in July. Recruitment trend worsened further as available opportunities slipped down by eight percent from the year-ago level from a negative five percent in June 2014.

Year-over-year Growth	Jul	Jul	% Growth
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	13	14	Y-o-Y
UAE	89	112	26%
Kuwait	114	125	10%
Oman	96	105	9%
KSA	112	121	8%
Egypt	138	142	3%
Bahrain	118	119	1%
Qatar	133	122	-8%

COUNTRY-WISE TRENDS

KSA Highlights

- Monster Employment Index KSA edges up by eight percent between July 2013 and 2014
- **Advertising, Market Research, Public Relations, Media and Entertainment** charts the steepest annual growth among all monitored industry sectors
- **Oil and Gas** sector registers the most notable annual decline
- Among occupation groups, **Sales and BD** professionals continues to lead by the way of long-term growth

KSA Top Growth Industries

Year-over-year Growth	Jul 13	Jul 14	% Growth Y-o-y
Advertising, Market Research, Public Relations, Media and Entertainment	99	118	19%
Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides	69	79	14%
Retail/Trade and Logistics	110	125	14%

KSA Lowest Growth Industries

Year-over-year Growth	Jul 13	Jul 14	% Growth Y-o-y
Education	107	108	1%
Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	118	94	-20%
Oil and Gas	137	98	-28%

KSA Top Growth Occupations

Year-over-year Growth	Jul 13	Jul 14	% Growth Y-o-y
Sales and BD	117	154	32%
Health Care	100	113	13%
Engineering and Production	118	127	8%

KSA Lowest Growth Occupations

Year-over-year Growth	Jul 13	Jul 14	% Growth Y-o-y
Purchase / Logistics / Supply Chain	122	115	-6%
Software, Hardware, Telecom	121	106	-12%
HR & Admin.	135	115	-15%

UAE Highlights

- Monster Employment Index UAE continues to trend upward; grows 25 percent year-on-year

- Year-on-year, **BFSI** leads all industry sectors yet again. Online recruitment contracts the most in **Advertising, Market Research, Public Relations, Media and Entertainment** sector
- **Purchase / Logistics / Supply Chain professionals** registers a dramatic 71 percent growth in demand and tops the long-term growth chart

UAE Top Growth Industries

Year-over-year Growth	Jul 13	Jul 14	% Growth Y-o-y
BFSI	112	157	40%
Engineering, Construction and Real Estate	105	145	38%
Health Care	107	132	23%

UAE Lowest Growth Industries

Year-over-year Growth	Jul 13	Jul 14	% Growth Y-o-y
Retail/Trade and Logistics	111	115	4%
IT and Telecom/ISP	90	91	1%
Advertising, Market Research, Public Relations, Media and Entertainment	109	93	-15%

UAE Top Growth Occupations

Year-over-year Growth	Jul 13	Jul 14	% Growth Y-o-y
Purchase / Logistics / Supply Chain	59	101	71%
Engineering and Production	93	127	37%
Customer service	54	69	28%

UAE Lowest Growth Occupations

Year-over-year Growth	Jul 13	Jul 14	% Growth Y-o-y
Sales and BD	107	117	9%
Hospitality and Travel	92	100	9%
HR & Admin.	94	98	4%

By Industry

	2013						2014						
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
Engineering, Construction and Real Estate	128	131	139	145	139	147	155	131	129	131	122	127	130
BFSI	121	120	129	154	145	151	159	114	122	121	139	142	136
Production/Manufacturing, Automotive and Ancillary	93	88	95	99	98	87	91	115	110	87	84	81	88
Retail/Trade and Logistics	112	126	150	167	154	143	165	141	156	151	150	154	142
Oil and Gas	90	90	89	90	93	90	89	92	84	82	88	84	90
IT and Telecom/ISP	94	96	101	106	104	102	109	104	92	96	98	93	93
Hospitality	125	120	139	161	150	147	152	134	148	143	152	186	161
Education	148	153	162	156	154	150	159	162	162	166	169	179	165
Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides	71	71	75	68	66	67	72	78	75	78	87	87	92
Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	108	92	108	100	91	89	94	101	111	83	79	74	86
Health Care	116	114	120	120	119	136	143	142	143	145	159	153	146
Advertising, Market Research, Public Relations, Media and Entertainment	130	131	136	146	141	149	154	116	121	117	135	128	119

By Occupation

	2013						2014						
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
Engineering and Production	117	118	122	130	126	125	129	128	126	124	112	124	131
Finance and Account	105	102	115	133	130	136	139	92	101	106	122	133	127
HR & Admin.	117	106	133	148	147	144	156	154	151	141	143	154	130
Sales and BD	151	149	165	189	165	174	190	182	189	188	194	195	172
Purchase / Logistics / Supply Chain	79	81	107	112	114	99	103	109	107	91	91	90	97
Hospitality and Travel	120	122	130	157	145	148	157	143	154	175	176	184	165
Health Care	119	118	122	127	125	127	145	137	138	143	158	158	155
Software, Hardware, Telecom	109	99	122	136	125	115	136	130	114	95	100	96	110
Marketing & Communications/Arts/Creative	127	131	141	159	155	159	170	164	170	171	179	170	155
Customer service	73	61	87	86	75	69	78	88	85	69	66	62	67
Legal	97	90	90	80	87	96	89	100	93	79	89	79	94

About the Monster Employment Index

Launched in April 2011 with data collected since October 2010, the Monster Employment Index is a broad and comprehensive monthly analysis of online job posting activity in the Middle East conducted by Monster.com. Based on a real-time review of tens of thousands of employer job opportunities culled from a large, representative selection of online career outlets, including Monster Gulf, the Monster Employment Index presents a snapshot of employer online recruitment activity nationwide. The Monster Employment Index's underlying data is validated for accuracy by Research America, Inc. – an independent, third-party auditing firm – to ensure that measured online job recruitment activity is within a margin of error of +/- 1.05%. Monster has taken due care in compiling and processing the data available from various sources for Monster Employment Index, but does not guarantee the accuracy, adequacy or completeness of any information and is not responsible for any errors or omissions or action / decision taken or for the results obtained from the use of such information.

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Monster Worldwide, Inc. (NYSE: MWW - News), parent company of Monster, the premier global online employment solution for more than a decade, strives to inspire people to improve their lives. With a local presence in key markets in North America, Europe, and Asia, Monster works for everyone by connecting employers with quality job seekers at all levels and by providing personalized career advice to consumers globally. Through online media sites and services, Monster delivers vast, highly targeted audiences to advertisers. To learn more about Monster's industry-leading products and services, visit www.monster.com. More information about Monster Worldwide is available at <http://about-monster.com>.

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