

monster®

EMPLOYMENT INDEX

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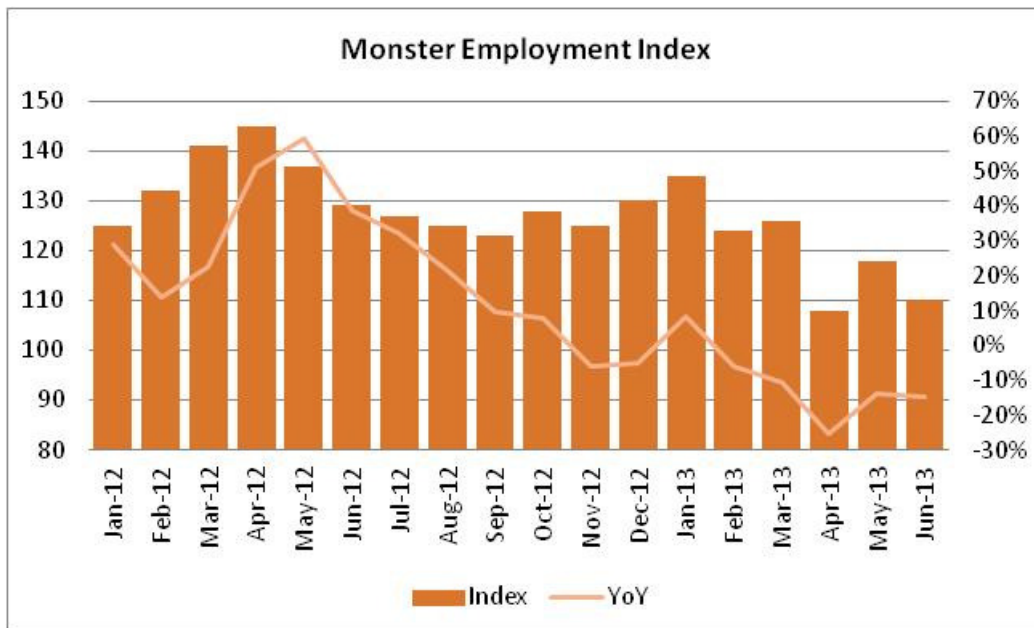
Monster Employment Index Middle East declines 15 Percent on Annual Basis

June 2013 Index Highlights:

- Monster Employment Index Middle East declines 15 percent on an annual basis
- Education followed by Health Care leads all industry sectors in annual growth
- Among occupation groups Health Care exhibit strongest growth year-over-year; Customer Service registers steepest annual decline
- Egypt leads all countries in annual growth. UAE registers steepest annual decline

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.

“Owing to the global business scenario, the employers in the Middle east continue to adopt a cautious approach in hiring. This is reflective in the double digit drop in the Monster Employment Index,” said Sanjay Modi, Managing Director, Monster.com (India/ Middle- East/ South East Asia).



Jan 12	Feb 12	Mar 12	Apr 12	May 12	Jun 12	Jul 12	Aug 12	Sep 12	Oct 12	Nov 12	Dec 12	Jan 13	Feb 13	Mar 13	Apr 13	May 13	Jun 13	Y-o-Y
125	132	141	145	137	129	127	125	123	128	125	130	135	124	126	108	118	110	-15%

Industry Year-over-Year Trends: Online opportunities exceeded June'12 levels in three of the 13 industry sectors monitored by the index.

- **Education** (up 18 percent) led all sectors followed by **Health Care** (up 9 percent)
- **Production/Manufacturing, Automotive and Ancillary** (down 34 percent) registered the steepest annual decline

Top Growth Industries

Year-over-year Growth	Jun 12	Jun 13	% Growth Y-o-y
Education	127	150	18%
Health Care	109	119	9%
Advertising, Market Research, Public Relations, Media and Entertainment	122	123	1%
Hospitality	128	126	-2%
Engineering, Construction and Real Estate	127	122	-4%

Lowest Growth Industries

Year-over-year Growth	Jun 12	Jun 13	% Growth Y-o-y
Retail/Trade and Logistics	145	132	-9%
IT and Telecom/ISP	102	91	-11%
Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	115	99	-14%
Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides	104	74	-29%
Production/Manufacturing, Automotive and Ancillary	124	82	-34%

Occupation Year-over-Year Trends: Three of 11 occupation groups registered improved online demand over the year

- **Healthcare** (up 16 percent) led all occupational groups in year-over-year growth
- **Customer service** (down 25 percent each) professionals registered the weakest long-term trend

Top Growth Occupations

Year-over-year Growth	May 12	May 13	% Growth Y-o-y
Health Care	109	126	16%
Hospitality and Travel	113	116	3%
Marketing & Communications/Arts/Creative	118	121	3%
Engineering and Production	117	112	-4%
Sales and BD	152	139	-9%

Lowest Growth Occupations

Year-over-year Growth	Jun 12	Jun 13	% Growth Y-o-y
HR & Admin.	124	107	-14%
Finance and Account	117	99	-15%
Purchase / Logistics / Supply Chain	109	91	-17%
Software, Hardware, Telecom	124	95	-23%
Customer service	116	87	-25%

Geographic Year-over-year Trends: Online opportunities exceeded June'12 level in four of the seven countries monitored by the Index.

- **Egypt** (up 17 percent) followed by **Qatar** (up 11 percent) led all countries in year-over-year growth
- **UAE** (down 31 percent) registered the steepest decline over the past 12 months

Year-over-year Growth	Jun 12	Jun 13	% Growth Y-o-y
Egypt	109	128	17%
Qatar	119	132	11%
Bahrain	114	124	9%
KSA	112	115	3%
Oman	103	96	-7%
Kuwait	138	114	-17%
UAE	129	89	-31%

COUNTRY-WISE TRENDS

KSA Highlights

- Online recruitment activity in KSA rises three percent from June'12 level
- **Oil & Gas** (up 34 percent) registers positive annual growth.
- Among occupation groups, **Purchase / Logistics / Supply Chain** (up 13 percent) registered highest annual growth

KSA Top Growth Industries

Year-over-year Growth	Jun 12	Jun 13	% Growth Y-o-y
Oil and Gas	107	143	34%
Education	108	122	13%
Health Care	99	100	1%

KSA Lowest Growth Industries

Year-over-year Growth	Jun 12	Jun 13	% Growth Y-o-y
Hospitality	175	163	-7%
Engineering, Construction and Real Estate	100	90	-10%
Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides	81	71	-12%

KSA Top Growth Occupations

Year-over-year Growth	Jun 12	Jun 13	% Growth Y-o-y
Purchase / Logistics / Supply Chain	108	122	13%
Engineering and Production	112	123	10%
Marketing & Communications/Arts/Creative	96	103	7%

KSA Lowest Growth Occupations

Year-over-year Growth	Jun 12	Jun 13	% Growth Y-o-y
HR & Admin.	124	125	1%
Sales and BD	122	121	-1%
Hospitality and Travel	115	114	-1%

UAE Highlights

- UAE registers annual 31 percent annual decline
- **Health Care** (up 8 percent) recorded the highest annual growth
- **Health Care** (up 7 percent each) lead in annual growth amongst the occupation groups

UAE Top Growth Industries

Year-over-year Growth	Jun 12	Jun 13	% Growth Y-o-y
Health Care	109	118	8%
Hospitality	130	127	-2%
Education	122	118	-3%

UAE Lowest Growth Industries

Year-over-year Growth	Jun 12	Jun 13	% Growth Y-o-y
IT and Telecom/ISP	103	90	-13%
Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides	103	89	-14%
Production/Manufacturing, Automotive and Ancillary	129	92	-29%

UAE Top Growth Occupations

Year-over-year Growth	Jun 12	Jun 13	% Growth Y-o-y
Health Care	133	142	7%
Hospitality and Travel	97	93	-4%
HR & Admin.	102	93	-9%

UAE Lowest Growth Occupations

Year-over-year Growth	Jun 12	Jun 13	% Growth Y-o-y
Software, Hardware, Telecom	102	81	-21%
Purchase / Logistics / Supply Chain	87	67	-23%
Customer service	112	61	-46%

By Industry

	2012							2013					
		Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Engineering, Construction and Real Estate	127	126	123	111	112	113	118	123	124	122	112	125	122
BFSI	116	109	112	121	117	116	106	116	110	101	92	109	109
Production/Manufacturing, Automotive and Ancillary	124	124	124	118	135	116	111	113	117	117	99	99	82
Retail/Trade and Logistics	145	141	140	142	143	169	131	139	129	122	119	129	132
Oil and Gas	92	91	91	90	96	95	92	91	89	96	97	93	88
IT and Telecom/ISP	102	102	87	97	100	96	99	100	91	89	87	94	91
Hospitality	128	139	126	119	127	142	151	156	145	133	116	123	126
Education	127	132	127	127	120	125	140	145	146	151	140	158	150
Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides	104	93	85	89	100	78	77	77	78	83	77	71	74
Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	115	107	93	95	105	110	95	98	117	114	101	103	99
Health Care	109	111	100	112	114	116	119	120	128	142	115	126	119
Advertising, Market Research, Public Relations, Media and Entertainment	122	124	138	121	120	119	120	127	117	115	114	121	123

By Occupation

	2012							2013					
		Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Engineering and Production	117	119	118	114	117	115	115	117	117	118	113	110	112
Finance and Account	117	114	104	109	104	106	104	110	104	103	87	100	99
HR & Admin.	124	128	116	123	120	122	126	140	118	110	100	105	107
Sales and BD	152	150	137	155	160	158	163	175	153	142	140	152	139
Purchase / Logistics / Supply Chain	109	111	110	102	106	111	106	107	117	112	103	98	91
Hospitality and Travel	113	119	130	121	119	119	133	144	129	123	116	118	116
Health Care	109	110	107	113	116	120	124	122	133	149	119	131	126
Software, Hardware, Telecom	124	123	101	107	115	107	105	121	91	88	85	97	95
Marketing & Communications/Arts/Creative	118	116	109	111	111	109	122	107	110	112	108	120	121
Customer service	116	123	117	104	110	114	102	117	95	98	88	100	87
Legal	94	88	83	76	69	78	80	75	73	74	74	83	83

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.

About Monster Worldwide

Monster Worldwide, Inc. (NYSE:MWW), is the global leader in successfully connecting job opportunities and people. Monster uses the world's most advanced technology to help people Find Better, matching job seekers to opportunities via digital, social and mobile solutions including monster.com®, our flagship website, and employers to the best talent using a vast array of products and services. As an Internet pioneer, more than 200 million people have registered on the Monster Worldwide network.

Today, with operations in more than 40 countries, Monster provides the broadest, most sophisticated job seeking, career management, recruitment and talent management capabilities globally. For more information visit about.monster.com.

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