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EMPLOYMENT INDEX

Monster Employment Index Middle East Registers a Five Percent Growth on the Year

September 2014 Index Highlights

- Monster Employment Index Middle East continues to exhibit an upward trend vis-à-vis the previous year. The rate of growth at five percent year-on-year, nevertheless, is the lowest since September 2013
- Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides leads all Industry sector year-on-year. Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery registers the steepest decline
- Online demand expands the most for Hospitality & Travel professionals between September 2013 and 2014
- Egypt followed by UAE leads all monitored countries. Qatar records no growth over the corresponding period a year ago once again

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.

“Although still positive, UAE’s growth rate of 5% year-on-year is at the lowest in 12 months, indicating that the pace of online recruitment growth in the Middle East has somewhat slowed down.

In line with the regional trend, the UAE pace of growth has slowed down year on year, registering an 8 percent growth in September 2014, compared to 26 per cent in August 2014. Sector wise, Hospitality is the lowest growth industry in the country, with online opportunities declining 27 per cent year on year.

Looking at top growth industries in the UAE, BFSI and Healthcare continue to lead the growth momentum with a 39 per cent increase and a 27 per cent increase, respectively. The most sought after occupations are software, hardware and telecom jobs with an 18 per cent increase year on year.

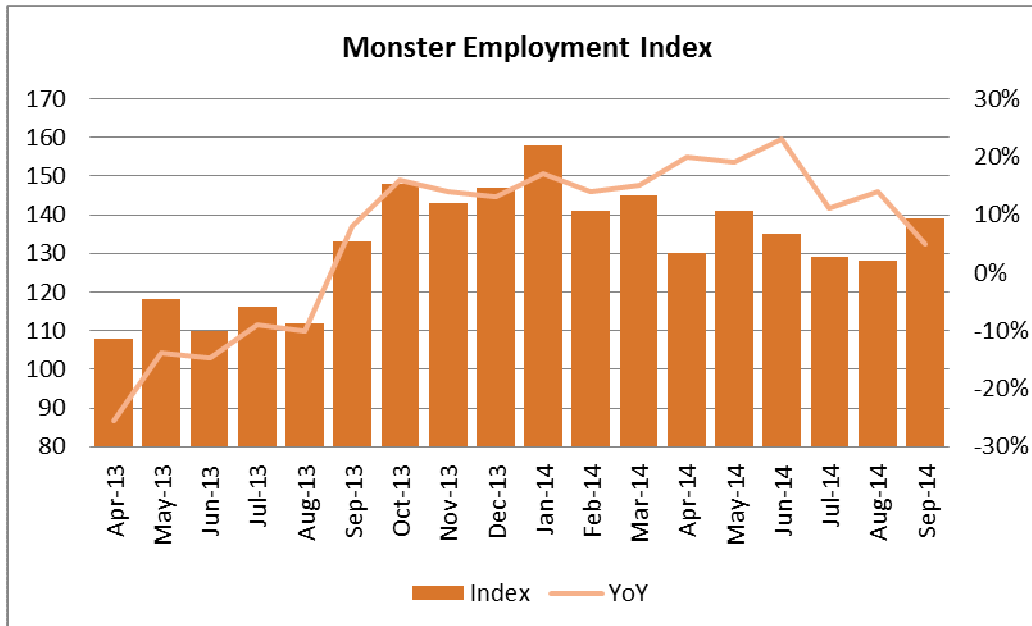
Regionally, Chemicals / Plastic / Rubber / Paints / Fertilizer and Pesticides are leading the growth momentum in the region, up by 26 per cent year on year. Hospitality is the second best performing sector throughout the Middle East region, up 28 per cent year on year, closely followed by Healthcare with a growth of 23 per cent year on year.

The Oil and Gas sector was at its lowest, especially in KSA. The latest HSBC Purchasing Managers Index revealed that business activity in the Gulf was expanding at the fastest pace globally backed mostly by growth in the non-oil producing private sectors - evidence of the region’s efforts in diversifying its economies away from oil reliance. Business conditions are most favorable in KSA, followed by UAE,” **said Sanjay Modi, Managing Director, Monster.com (India/ Middle- East/ South East Asia/ Hong Kong).**

KSA saw a 3 per cent growth in online opportunities year on year. Looking at top growth industries in the Kingdom, Advertising / Market Research / Public Relations / Media and Entertainment continue to register the best annual growth, currently at 31 per cent year on year. The IT and Telecom sector is growing at 23 per cent year on year.

Oil and Gas continues to register the steepest decline, with a negative growth of 22 per cent year on year. The latest HSBC Purchasing Managers Index revealed that business activity in the Gulf was expanding at the fastest pace globally backed mostly by growth in the non-oil producing private sectors - evidence of the region’s efforts in diversifying its economies away from oil reliance. Business conditions are most favorable in KSA, followed by the UAE.

The index shows the most popular occupations are for Finance and Accountant professionals, followed by Purchase / Logistics / Supply Chain and Hospitality and Travel,” said **Sanjay Modi, Managing Director, Monster.com (India/ Middle- East/ South East Asia/ Hong Kong).**



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	Aug 14	Sep 14	Y-o-Y
108	118	110	116	112	133	148	143	147	158	141	145	130	141	135	129	128	139	5%

Industry Year-over-Year Trends: Six of the 12 industry sectors monitored by the Index displayed improved annual growth trends

- **Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides** (up 36 percent) supplanted **Hospitality** (up 28 percent) to lead all monitored industry sectors by the way of long term growth. The year-on-year growth rate in the Hospitality sector eased six percentage points between August and September 2014 in spite of an 11 percent growth in hiring activity on the month.
- **Engineering, Construction and Real Estate** (down three percent) sector exhibited fewer opportunities on the year for the second month in succession.
- Online recruitment activity in **Production/Manufacturing, Automotive and Ancillary** (down 11 percent); and **Oil and Gas** (down one percent) sector slipped below the year-ago level once again having registered marginal growth in August 2014.
- Online hiring in the **Retail/Trade and Logistics** (up five percent) sector continues to trend upward. It is notable however that the growth momentum has eased significantly. The sector registered a single-digit year-on-year growth for the first time since February 2014.
- **Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery** (down 28 percent) registered the steepest year-on-year decline among all sectors.

Top Growth Industries

Year-over-year Growth	Sep 13	Sep 14	% Growth Y-o-Y
Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides	75	102	36%
Hospitality	139	178	28%
Health Care	120	147	23%
BFSI	129	152	18%
Education	162	170	5%

Lowest Growth Industries

Year-over-year Growth	Sep 13	Sep 14	% Growth Y-o-Y
Engineering, Construction and Real Estate	139	135	-3%
IT and Telecom/ISP	101	95	-6%
Advertising, Market Research, Public Relations, Media and Entertainment	136	123	-10%
Production/Manufacturing, Automotive and Ancillary	95	85	-11%
Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	108	78	-28%

Occupation Year-over-Year Trends: Online demand expanded for eight of the 11 occupational groups monitored by the Index.

- Year-on-year, online demand for **Hospitality and Travel** (up 35 percent) professionals continues to grow at a pace faster than any other group. While the rate of growth has hovered around the same range this quarter, the Index reading at 176 is highest in the series.
- Online demand for **Software, Hardware, Telecom** (down six percent) fell short of that in the corresponding period the previous year. The group registered a negative annual growth for the first time since August 2013.
- **Customer service** (down seven percent) saw demand slip below the year ago level yet again. **Purchase / Logistics / Supply Chain** (down 16 percent) charted the steepest annual decline among all groups.

Top Growth Occupations

Year-over-year Growth	Sep 13	Sep 14	% Growth Y-o-y
Hospitality and Travel	130	176	35%
Sales and BD	165	195	18%
Finance and Account	115	135	17%
Marketing & Communications/Arts/Creative	141	165	17%
Health Care	122	141	16%

Lowest Growth Occupations

Year-over-year Growth	Sep 13	Sep 14	% Growth Y-o-y
Legal	90	98	9%
Engineering and Production	122	129	6%
Software, Hardware, Telecom	122	115	-6%
Customer service	87	81	-7%
Purchase / Logistics / Supply Chain	107	90	-16%

Geographic Year-over-year Trends: Five out of seven countries monitored by the Index indicated increase in availability of online jobs year-on-year.

- **Egypt** (up 27 percent) saw the most notable growth in online opportunities between September 2013 and 2014.

- **UAE** was next in the growth ladder charting eight percent growth on the year. It is notable that the pace of growth in UAE has eased 18 percentage points between August and September 2013. UAE exhibited the double-digits growth in online recruitment during the past three months; the steepest among all monitored cities.
- In **Qatar** recruitment levels continue to match with that of the previous year. Bahrain exhibits a three percent drop in hiring activity year-on-year.

Year-over-year Growth	Sep 13	Sep 14	% Growth Y-o-Y
Egypt	120	152	27%
UAE	109	118	8%
Kuwait	113	119	5%
Oman	105	109	4%
KSA	110	113	3%
Qatar	133	133	0%
Bahrain	124	120	-3%

COUNTRY-WISE TRENDS

KSA Highlights

- Monster Employment Index KSA moves up by three percent between September 2013 and 2014
- **Advertising, Market Research, Public Relations, Media and Entertainment** industry exhibit the most notable annual growth
- **Oil and Gas** sector continues to register the steepest decline, year-on-year
- Year-on-year, online demand improved the most for **Finance and Account** professionals followed by **Purchase / Logistics / Supply Chain**

KSA Top Growth Industries

Year-over-year Growth	Sep 13	Sep 14	% Growth Y-o-y
Advertising, Market Research, Public Relations, Media and Entertainment	101	132	31%
IT and Telecom/ISP	87	107	23%
Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides	69	79	14%

KSA Lowest Growth Industries

Year-over-year Growth	Sep 13	Sep 14	% Growth Y-o-y
Retail/Trade and Logistics	135	118	-13%
Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	102	83	-19%
Oil and Gas	134	104	-22%

KSA Top Growth Occupations

Year-over-year Growth	Sep 13	Sep 14	% Growth Y-o-y
Finance and Account	100	109	9%
Purchase / Logistics / Supply Chain	96	98	2%
Hospitality and Travel	111	113	2%

KSA Lowest Growth Occupations

Year-over-year Growth	Sep 13	Sep 14	% Growth Y-o-y
Software, Hardware, Telecom	117	111	-5%
Engineering and Production	115	106	-8%
HR & Admin.	135	116	-14%

UAE Highlights

- Monster Employment Index UAE registers eight percent growth on the year. The pace of growth moderates 18 percentage points; down from 26 percent in August 2014
- Among Industry sectors, **BFSI** continues to lead and **Hospitality** sector records the lowest low
- Year-on-year, online demand expands the most for **Software, Hardware, Telecom** professionals

UAE Top Growth Industries

Year-over-year Growth	Sep 13	Sep 14	% Growth Y-o-y
BFSI	118	164	39%
Health Care	113	144	27%
Engineering, Construction and Real Estate	117	139	19%

UAE Lowest Growth Industries

Year-over-year Growth	Sep 13	Sep 14	% Growth Y-o-y
Retail/Trade and Logistics	140	115	-18%
Advertising, Market Research, Public Relations, Media and Entertainment	120	98	-18%
Hospitality	145	106	-27%

UAE Top Growth Occupations

Year-over-year Growth	Sep 13	Sep 14	% Growth Y-o-y
Software, Hardware, Telecom	94	111	18%
Engineering and Production	102	118	16%
Health Care	144	163	13%

UAE Lowest Growth Occupations

Year-over-year Growth	Sep 13	Sep 14	% Growth Y-o-y
Hospitality and Travel	103	101	-2%
Sales and BD	130	126	-3%
HR & Admin.	106	100	-6%

By Industry

	2013				2014								
	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
Engineering, Construction and Real Estate	139	145	139	147	155	131	129	131	122	127	130	121	135
BFSI	129	154	145	151	159	114	122	121	139	142	136	136	152
Production/Manufacturing, Automotive and Ancillary	95	99	98	87	91	115	110	87	84	81	88	92	85
Retail/Trade and Logistics	150	167	154	143	165	141	156	151	150	154	142	141	157
Oil and Gas	89	90	93	90	89	92	84	82	88	84	90	95	88
IT and Telecom/ISP	101	106	104	102	109	104	92	96	98	93	93	93	95
Hospitality	139	161	150	147	152	134	148	143	152	186	161	161	178
Education	162	156	154	150	159	162	162	166	169	179	165	162	170

Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides	75	68	66	67	72	78	75	78	87	87	92	89	102
Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	108	100	91	89	94	101	111	83	79	74	86	87	78
Health Care	120	120	119	136	143	142	143	145	159	153	146	143	147
Advertising, Market Research, Public Relations, Media and Entertainment	136	146	141	149	154	116	121	117	135	128	119	119	123

By Occupation

	2013				2014								
	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
Engineering and Production	122	130	126	125	129	128	126	124	112	124	131	125	129
Finance and Account	115	133	130	136	139	92	101	106	122	133	127	129	135
HR & Admin.	133	148	147	144	156	154	151	141	143	154	130	133	145
Sales and BD	165	189	165	174	190	182	189	188	194	195	172	174	195
Purchase / Logistics / Supply Chain	107	112	114	99	103	109	107	91	91	90	97	95	90
Hospitality and Travel	130	157	145	148	157	143	154	175	176	184	165	163	176
Health Care	122	127	125	127	145	137	138	143	158	158	155	133	141
Software, Hardware, Telecom	122	136	125	115	136	130	114	95	100	96	110	111	115
Marketing & Communications/Arts/Creative	141	159	155	159	170	164	170	171	179	170	155	160	165
Customer service	87	86	75	69	78	88	85	69	66	62	67	77	81
Legal	90	80	87	96	89	100	93	79	89	79	94	100	98

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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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>.

CONTACTS:

Priyanka Sharma Kaintura
Monster India
(91) 9911822233
priyanka.sharma@monsterindia.com

Emily Franca
Hill+Knowlton Strategies
Phone: +971 56 4144 818
Email: Emily.Franca@hkstrategies.com