

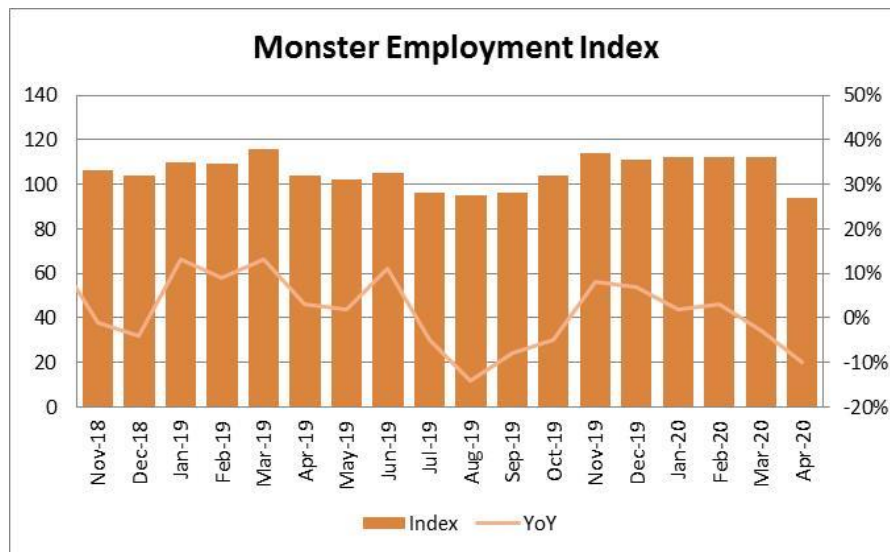
monster[®] EMPLOYMENT INDEX

Monster Employment Index Middle East

April 2020 Index Highlights

- Monster Employment Index Middle East registers annual decline of 10 percent in April 2020.
- Month-on-month demand plummeted by 16 percent.
- Among industry sectors, Oil and Gas leads annual growth in online hiring activity.
- Engineering, Construction and Real Estate witnesses the steepest decline, on-the-year.
- Among job-roles, Hospitality and Travel professionals record the most-notable growth in demand on annual basis.
- Bahrain is the only country to witness positive annual growth.

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.



Monster Employment Index Middle East results for the past 18 months are as follows:

Nov 18	Dec 18	Jan 19	Feb 19	Mar 19	Apr 19	May 19	Jun 19	Jul 19	Aug 19	Sep 19	Oct 19	Nov 19	Dec 19	Jan 20	Feb 20	Mar 20	Apr 20	Y-o-Y
106	104	110	109	116	103	102	105	96	95	96	104	114	111	112	112	112	94	-10%

Industry Year-over-Year Trends: Four of the 12 sectors monitored by the Index indicated positive annual growth. All the sectors recorded decline on month-on-month basis owing to COVID-19 crisis.

- **Oil and Gas** (up 24 percent) saw the most-notable annual growth among industry sectors in April 2020. The sector witnessed double-digit growth for the third consecutive month in a row. However, on-the-month, decline of seven percent was recorded.
- Year-on-year, **IT and Telecom/ISP** (up seven percent) continued to register uptrend in online hiring activity. Growth momentum improved by three percentage points; up from four percent in March 2020. Month-on-month growth eased by eight percent.
- **Advertising, Market Research, Public Relations, Media and Entertainment** (up seven percent) continued to rank among top growth industries since November 2019. Monthly demand slowed down by seven percent.
- Several sectors have also slowed hiring amid COVID-19 on annual basis. **Retail/Trade and Logistics** (down eight percent) slipped from seven percent growth last month. **Consumer Goods/ FMCG, Food & Packaged Food, Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery** (down six percent) saw receded growth for the first time since December 2019. **Petrochemicals** (down 10 percent) recorded the most-notable annual decline in the series since the beginning of the year.
- **Engineering, Construction and Real Estate** (down 28 percent) exhibited the steepest year-on-year decline among the monitored industry sectors.

Top Growth Industries

Year-over-year Growth	Apr 19	Apr 20	% Growth Y-o-Y
Oil and Gas	63	78	24%
IT and Telecom/ISP	242	260	7%
Advertising, Market Research, Public Relations, Media and Entertainment	58	62	7%
Education	115	116	1%
Health Care	135	135	0%

Lowest Growth Industries

Year-over-year Growth	Apr 19	Apr 20	% Growth Y-o-Y
Consumer Goods/ FMCG, Food & Packaged Food, Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	163	153	-6%
Retail/Trade and Logistics	73	67	-8%
Petrochemicals	108	97	-10%
Production/Manufacturing, Automotive and Ancillary	106	78	-26%
Engineering, Construction and Real Estate	115	83	-28%

Occupation Year-over-Year Trends: Growth in online demand for professionals was positive in four of the 11 job-roles monitored by the Index.

- Online demand for **Hospitality and Travel** (up five percent) professionals was most-notable from the year-ago level. However, growth momentum eased by 22 percentage points; down from 28 percent in March 2020. On-the-month, demand fell by 15 percent.
- **Health Care** exhibited year-on-year hike of five percent in April 2020; also ranked among top growth occupations. However, in short-term, hiring weakened on all parameters; down eight percent (month-on-month), down 11 percent (three-month) and no growth (six-month).
- COVID-19 has also disrupted hiring among occupation categories, on-the-year. **Sales and BD** (down 15 percent) saw annual decline for the first time since December 2018. **Purchase / Logistics / Supply Chain** (down nine percent) slipped by 19 percentage points; down from growth of 10 percent last month. **Software, Hardware, Telecom** (down six percent) saw negative growth for the first time in the last seven months.
- **Finance and Account** (down 34 percent) registered the most-notable annual decline among occupation groups.

Top Growth Occupations

Year-over-year Growth	Apr 19	Apr 20	% Growth Y-o-Y
Hospitality and Travel	101	106	5%
Health Care	106	111	5%
Marketing & Communications/Arts/Creative	122	127	4%
HR & Admin.	80	82	2%
Customer service	76	74	-3%

Lowest Growth Occupations

Year-over-year Growth	Apr 19	Apr 20	% Growth Y-o-Y
Purchase / Logistics / Supply Chain	106	96	-9%
Sales and BD	95	81	-15%
Engineering and Production	108	85	-21%
Legal	114	79	-31%
Finance and Account	106	70	-34%

Geographic Year-over-year Trends: COVID-19 pandemic has slowed down hiring across regions. Online demand exceeded the year-ago level in only one of the seven countries monitored by the Index.

- **Bahrain** (up one percent) recorded only a marginal growth in online hiring activity. However, pace of growth eased by five percentage points vis-à-vis six percent growth last month. The region recorded decline on month-on-month (down 10 percent), three-month (down 13 percent) and six-month (down nine percent) basis.
- Rest all other regions witnessed drop in hiring activity on annual basis. Of which, **UAE** (down 57 percent) saw the most-notable decline.

Year-over-year Growth	Apr 19	Apr 20	% Growth Y-o-Y
Bahrain	100	101	1%
KSA	118	116	-2%
Oman	108	103	-5%
Egypt	93	88	-5%
Qatar	86	80	-7%
Kuwait	122	93	-24%
UAE	72	31	-57%

COUNTRY-WISE TRENDS

KSA Highlights

- Monster Employment Index **KSA** registers decline of two percent on-the-year.
- **Advertising, Market Research, Public Relations, Media and Entertainment** sector records the most-notable annual growth.
- **Production/Manufacturing, Automotive and Ancillary** registers the steepest decline, year-on-year.
- Among occupation categories, **Marketing & Communications/Arts/Creative** professionals are the most sought-after talent.

KSA Top Growth Industries

Year-over-year Growth	Apr 19	Apr 20	% Growth Y-o-Y
Advertising, Market Research, Public Relations, Media and Entertainment	144	183	27%
Health Care	162	185	14%
BFSI	148	158	7%

KSA Lowest Growth Industries

Year-over-year Growth	Apr 19	Apr 20	% Growth Y-o-Y
Engineering, Construction and Real Estate	117	105	-10%
Oil and Gas	122	109	-11%
Production/Manufacturing, Automotive and Ancillary	101	79	-22%

KSA Top Growth Occupations

Year-over-year Growth	Apr 19	Apr 20	% Growth Y-o-Y
Marketing & Communications/Arts/Creative	113	136	20%
Hospitality and Travel	89	105	18%
Health Care	127	137	8%

KSA Lowest Growth Occupations

Year-over-year Growth	Apr 19	Apr 20	% Growth Y-o-Y
Purchase / Logistics / Supply Chain	97	89	-8%
Finance and Account	145	129	-11%
Engineering and Production	109	93	-15%

UAE Highlights

- Monster Employment Index **UAE** witnesses decline of 57 percent from the year-ago level.
- **Petrochemicals** leads among the monitored sectors, on-the-year.
- **Retail/Trade and Logistics** registers the steepest annual decline.
- Among job-roles, **Engineering and Production** exhibits the most-notable increase in demand, year-on-year.

UAE Top Growth Industries

Year-over-year Growth	Apr 19	Apr 20	% Growth Y-o-Y
Petrochemicals	105	119	13%
Health Care	127	132	4%
Oil and Gas	58	60	3%

UAE Lowest Growth Industries

Year-over-year Growth	Apr 19	Apr 20	% Growth Y-o-Y
Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	148	97	-34%
Engineering, Construction and Real Estate	77	48	-38%
Retail/Trade and Logistics	86	48	-44%

UAE Top Growth Occupations

Year-over-year Growth	Apr 19	Apr 20	% Growth Y-o-Y
Engineering and Production	90	90	0%
Customer service	53	52	-2%
Health Care	73	69	-5%

UAE Lowest Growth Occupations

Year-over-year Growth	Apr 19	Apr 20	% Growth Y-o-Y
Finance and Account	53	32	-40%
Sales and BD	74	26	-65%
HR & Admin.	51	17	-67%

By Industry

	2019									2020			
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
Engineering, Construction and Real Estate	115	110	116	104	93	90	90	103	99	100	94	89	83
BFSI	84	83	87	82	86	90	80	91	89	88	89	92	81
Production/Manufacturing, Automotive and Ancillary	106	103	96	102	111	103	94	101	94	95	85	86	78
Retail/Trade and Logistics	73	73	77	77	80	76	78	78	74	73	79	79	67
Oil and Gas	63	64	59	58	61	64	65	71	64	56	85	84	78
IT and Telecom/ISP	242	246	239	223	218	216	216	232	221	218	287	284	260
Hospitality	88	88	96	97	100	100	102	96	92	93	98	96	83
Education	115	110	114	111	109	105	105	106	109	115	121	122	116
Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides	108	103	104	105	109	109	105	107	109	109	106	105	97
Consumer Goods/ FMCG, Food & Packaged Food, Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	163	157	145	145	166	159	166	156	156	160	177	175	153
Health Care	135	137	138	129	134	134	137	137	136	146	138	138	135
Advertising, Market Research, Public Relations, Media and Entertainment	58	58	59	59	60	59	60	63	63	64	67	67	62

By Occupation

	2019									2020			
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
Engineering and Production	108	106	102	92	93	94	92	95	92	94	92	90	85
Finance and Account	106	101	93	92	93	91	87	94	94	84	83	84	70
HR & Admin.	80	79	96	92	93	92	88	103	97	96	104	107	82
Sales and BD	95	94	108	107	96	93	93	99	98	97	98	98	81
Purchase / Logistics / Supply Chain	106	104	106	106	109	109	107	117	112	109	108	109	96
Hospitality and Travel	101	101	107	109	107	109	110	117	117	113	126	125	106
Health Care	106	113	119	113	114	112	111	116	118	125	129	120	111
Software, Hardware, Telecom	195	198	198	202	203	210	207	222	221	218	223	222	184
Marketing & Communications/Arts/Creative	122	120	130	133	131	134	135	144	149	144	150	151	127
Customer service	76	78	89	87	90	89	89	98	95	88	100	99	74
Legal	114	112	106	104	106	104	99	107	103	90	97	96	79

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. 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.