

monster®

EMPLOYMENT INDEX

Monster Employment Index Middle East records 14 Percent Growth in Online Recruitment Activity, Year-on-Year

August 2014 Index Highlights

- Monster Employment Index Middle East registers a 14 percent growth in online recruitment between August 2013 and 2014
- Hospitality sector among industries charts the steepest growth on the year. Advertising, Market Research, Public Relations, Media and Entertainment exhibits the most notable decline
- Among Occupations groups, Hospitality & Travel professionals register the steepest growth in demand year-on-year
- UAE continues to lead all monitored countries whereas Qatar indicated no growth over 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.

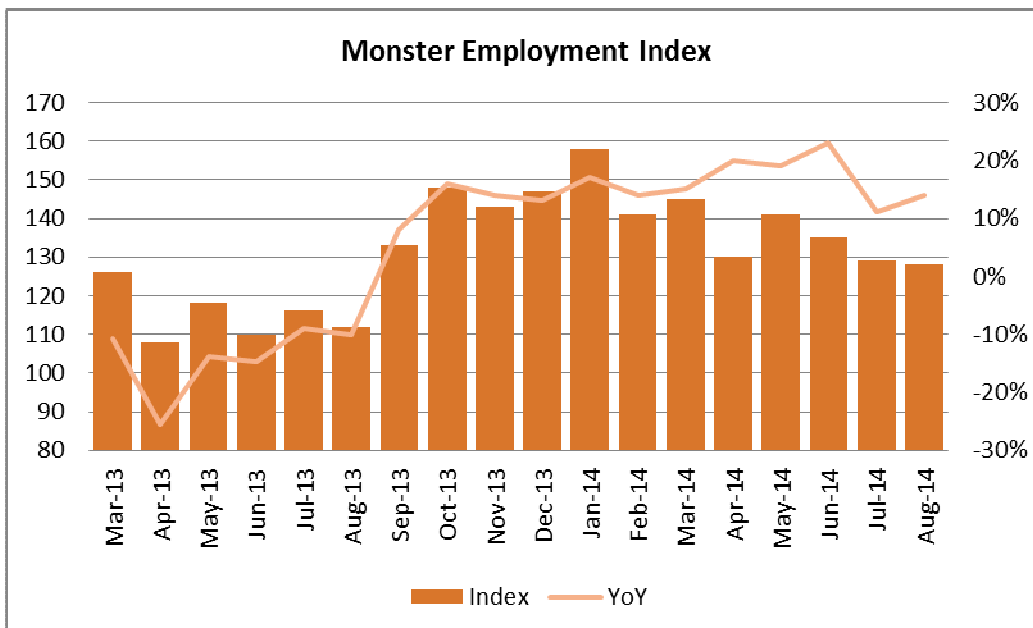
“We are seeing continued growth in the online recruitment activity in the region, with the Monster Employment Index Middle East indicating a steady increase of 14 per cent year on year. Geographically, the UAE market is the primary growth stimulator, while Hospitality and Tourism are the main growth drivers sector wise,” said **Sanjay Modi, Managing Director, Monster.com (India/ Middle- East/ South East Asia/ Hong Kong)**.

“The UAE index increased a healthy 26 per cent year on year, with the UAE BFSI sector increasing 46 per cent and the UAE Oil & Gas increasing 27 per cent. Customer service professionals registered the most notable growth in demand, with a 63 per cent increase year on year. Other top growth occupations in the UAE for the month of August 2014 were Purchase / Logistics / Supply Chain, with a strong 58% per cent growth year on year and Software / Hardware / Telecom with a healthy 35 per cent increase year on year.

“With the improved economy and the growing attractiveness of the UAE as a job destination, hiring in the UAE will see a significant improvement over the next three to twelve months. Overall, the region's hiring outlook for the coming months is reasonably positive,” continued Modi.

“In Saudi Arabia, the best performing sectors in online job availability were IT and Telecom / ISP, followed by Advertising / Market Research / Public Relations / Media and Entertainment, with a year on year growth of 28 per cent and 21 per cent, respectively. The Saudi Oil & Gas sector exhibited the steepest decline in online job availability, with a decrease of 25 per cent year on year.

“Regionally, the Hospitality and Travel sector increased 24 per cent, Finance and Accounting 26 per cent and, surprisingly Customer Service was at its strongest as compared to the last 17 months, increasing 26 per cent as well. Other sectors that performed well are HR & Admin and Marketing & Communications / Arts / Creative, with a 25 per cent and 22 per cent increase, respectively.” opined Modi.



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	Aug 14	Y-o-Y
126	108	118	110	116	112	133	148	143	147	158	141	145	130	141	135	129	128	14%

Industry Year-over-Year Trends: Of the 13 industry sectors followed by the Index, eight have displayed improved annual growth trends this month

- **Hospitality** (up 34 percent) led all the industry sectors, year-on-year. Furthermore, the annual growth rate this month surpassed that of previous month by five percentage points. The index reading for the series remained steady at 161 following a 13 percent drop between June and July 2014.
- **Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides;** and **Health Care** charted a 25 percent growth in online recruitment respectively and were next only to the Hospitality sector in terms of long-term gain. Nevertheless, the long-term growth momentum in each of these sectors eased between July 2014 and August 2014.
- **Production/Manufacturing, Automotive and Ancillary** (up five percent) sector registered a positive growth on the year for the first time since October 2012. At the same time there has been an upward movement in monthly hiring for the second time in succession indicating that the sector is on a path of recovery. The related **Oil and Gas** sector also registered a six percent growth in online recruitment activity from the corresponding period a year-ago following low level the previous months.
- Year-on-year, **Advertising, Market Research, Public Relations, Media and Entertainment** (down nine percent) has exhibited steepest fall in online recruitment activity among all industry sectors. The annual growth rate for the sector has been consistently falling for the past three months and this has been the lowest figure recoded since February 2014. **Engineering, Construction and Real Estate** (down eight percent) has also displayed a negative annual growth this month.

Top Growth Industries

Lowest Growth Industries

Year-over-year Growth	Aug 13	Aug 14	% Growth Y-o-Y
Hospitality	120	161	34%
Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides	71	89	25%
Health Care	114	143	25%
BFSI	120	136	13%
Retail/Trade and Logistics	126	141	12%

Year-over-year Growth	Aug 13	Aug 14	% Growth Y-o-Y
Production/Manufacturing, Automotive and Ancillary	88	92	5%
IT and Telecom/ISP	96	93	-3%
Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	92	87	-5%
Engineering, Construction and Real Estate	131	121	-8%
Advertising, Market Research, Public Relations, Media and Entertainment	131	119	-9%

Occupation Year-over-Year Trends: Online recruitment in all the 11 occupational groups monitored by the Index has exhibited a rise.

- **Hospitality and Travel** (up 34 percent) professionals witnessed steepest growth in demand between July 2014 and August 2014.
- **Customer service** exhibited a dramatic 26 percent growth in demand after 17 months of negative growth on the year since March 2013. The groups also recorded the steepest growth month-on-month among all occupation groups. Online demand for **Legal** (up 11 percent) professionals also surpassed the year-ago level this month having charted negative growth in the previous two months.
- While **Health Care** (up 13 percent) continues to display significant improvement in online demand from the year-ago the growth momentum has slipped by 17 percentage points as compared to previous month. The groups also witnessed a 14 percent drop in demand month-on-month; the steepest among all occupation groups.
- **Engineering and Production** (up six percent) among occupation groups saw the most controlled growth in demand annually.

Top Growth Occupations

Year-over-year Growth	Aug 13	Aug 14	% Growth Y-o-y
Hospitality and Travel	122	163	34%
Finance and Account	102	129	26%
Customer service	61	77	26%
HR & Admin.	106	133	25%
Marketing & Communications/Arts/Creative	131	160	22%

Lowest Growth Occupations

Year-over-year Growth	Aug 13	Aug 14	% Growth Y-o-y
Sales and BD	149	174	17%
Health Care	118	133	13%
Software, Hardware, Telecom	99	111	12%
Legal	90	100	11%
Engineering and Production	118	125	6%

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

- Year-on-year, **UAE** (up 26 percent) continues to lead for the third successive month in terms of online jobs growth among all the countries monitored. The annual growth rate has hovered around the same range during this period. It is notable however that online recruitment in the region has eased slightly from the six-month level; down three percent between February and August 2014.
- KSA** (up five percent); **Kuwait** (up eight percent) indicates positive but slow pace in the movement of growth. Prior to this month, Kuwait has been registering growth in double digits for the past eight months.
- Online recruitment levels in **Qatar** matched that of the previous year and also the six-month ago level this month. Qatar recorded fewer opportunities on the year in June and July.

Year-over-year Growth	Aug 13	Aug 14	% Growth Y-o-Y
UAE	85	107	26%
Kuwait	99	107	8%
Egypt	136	145	7%
Bahrain	117	123	5%
KSA	110	115	5%
Oman	100	101	1%
Qatar	130	130	0%

COUNTRY-WISE TRENDS

KSA Highlights

- Monster Employment Index KSA registers a five percent growth in online job availability over the year
- IT and Telecom/ISP** followed by **Advertising, Market Research, Public Relations, Media and Entertainment** display the steepest annual growth among monitored industry sectors
- Oil and Gas** sector exhibits the steepest decline, year-on-year
- Among occupation groups, online demand improved the most for **Purchase / Logistics / Supply Chain** professionals between August 2013 and 2014

KSA Top Growth Industries

Year-over-year Growth	Aug 13	Aug 14	% Growth Y-o-y
IT and Telecom/ISP	87	111	28%
Advertising, Market Research, Public Relations, Media and Entertainment	94	114	21%
Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides	65	73	12%

KSA Lowest Growth Industries

Year-over-year Growth	Aug 13	Aug 14	% Growth Y-o-y
Hospitality	165	135	-18%
Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	110	86	-22%
Oil and Gas	134	100	-25%

KSA Top Growth Occupations

Year-over-year Growth	Aug 13	Aug 14	% Growth Y-o-y
Purchase / Logistics / Supply Chain	108	132	22%

KSA Lowest Growth Occupations

Year-over-year Growth	Aug 13	Aug 14	% Growth Y-o-y
Marketing & Communications/Arts/Creative	114	105	-8%

Sales and BD	123	135	10%
Finance and Account	104	110	6%

Engineering and Production	119	101	-15%
HR & Admin.	133	107	-20%

UAE Highlights

- Monster Employment Index UAE registers 26 percent growth on the year
- Among Industry sectors, **BFSI** continues to lead and **Advertising, Market Research, Public Relations, Media and Entertainment** sector records the lowest low yet again
- **Customer Service** professionals register the most notable growth in demand year-on-year

UAE Top Growth Industries

Year-over-year Growth	Aug 13	Aug 14	% Growth Y-o-y
BFSI	101	147	46%
Oil and Gas	81	103	27%
Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	79	100	27%

UAE Lowest Growth Industries

Year-over-year Growth	Aug 13	Aug 14	% Growth Y-o-y
Retail/Trade and Logistics	103	96	-7%
Hospitality	118	109	-8%
Advertising, Market Research, Public Relations, Media and Entertainment	106	94	-11%

UAE Top Growth Occupations

Year-over-year Growth	Aug 13	Aug 14	% Growth Y-o-y
Customer service	48	78	63%
Purchase / Logistics / Supply Chain	55	87	58%
Software, Hardware, Telecom	77	104	35%

UAE Lowest Growth Occupations

Year-over-year Growth	Aug 13	Aug 14	% Growth Y-o-y
Engineering and Production	97	110	13%
HR & Admin.	85	92	8%
Hospitality and Travel	91	96	5%

By Industry

	2013						2014						
	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Engineering, Construction and Real Estate	131	139	145	139	147	155	131	129	131	122	127	130	121
BFSI	120	129	154	145	151	159	114	122	121	139	142	136	136
Production/Manufacturing, Automotive and Ancillary	88	95	99	98	87	91	115	110	87	84	81	88	92
Retail/Trade and Logistics	126	150	167	154	143	165	141	156	151	150	154	142	141
Oil and Gas	90	89	90	93	90	89	92	84	82	88	84	90	95
IT and Telecom/ISP	96	101	106	104	102	109	104	92	96	98	93	93	93
Hospitality	120	139	161	150	147	152	134	148	143	152	186	161	161
Education	153	162	156	154	150	159	162	162	166	169	179	165	162

Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides	71	75	68	66	67	72	78	75	78	87	87	92	89
Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	92	108	100	91	89	94	101	111	83	79	74	86	87
Health Care	114	120	120	119	136	143	142	143	145	159	153	146	143
Advertising, Market Research, Public Relations, Media and Entertainment	131	136	146	141	149	154	116	121	117	135	128	119	119

By Occupation

	2013						2014						
	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Engineering and Production	118	122	130	126	125	129	128	126	124	112	124	131	125
Finance and Account	102	115	133	130	136	139	92	101	106	122	133	127	129
HR & Admin.	106	133	148	147	144	156	154	151	141	143	154	130	133
Sales and BD	149	165	189	165	174	190	182	189	188	194	195	172	174
Purchase / Logistics / Supply Chain	81	107	112	114	99	103	109	107	91	91	90	97	95
Hospitality and Travel	122	130	157	145	148	157	143	154	175	176	184	165	163
Health Care	118	122	127	125	127	145	137	138	143	158	158	155	133
Software, Hardware, Telecom	99	122	136	125	115	136	130	114	95	100	96	110	111
Marketing & Communications/Arts/Creative	131	141	159	155	159	170	164	170	171	179	170	155	160
Customer service	61	87	86	75	69	78	88	85	69	66	62	67	77
Legal	90	90	80	87	96	89	100	93	79	89	79	94	100

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 - 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>.

CONTACTS:

Priyanka Sharma Kaintura
Monster Gulf
(91) 99118 22233
Priyanka.Sharma@monsterindia.com

Masa Milhem
Hill+Knowlton Strategies
Phone: + +971 4 334 4930
Email: Masa.Milhem@hkstrategies.com