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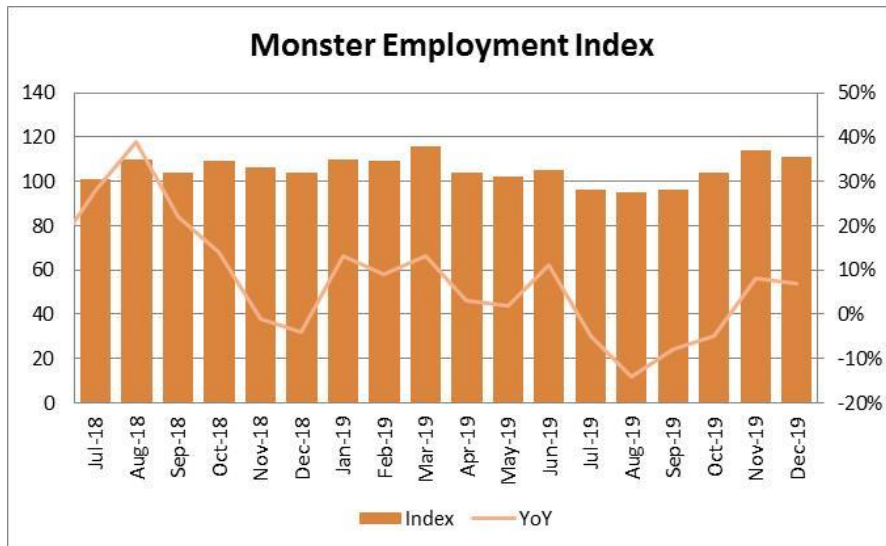
EMPLOYMENT INDEX

Monster Employment Index Middle East

December 2019 Index Highlights

- Monster Employment Index Middle East witnesses uptrend of seven percent in online recruitment activity, on-the-year.
- Month-on-month demand declines by three percent.
- Among industry sectors, Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides lead 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.
- KSA leads year-on-year growth among regions. Online recruitment in UAE records the most-notable 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.



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

Jul 18	Aug 18	Sep 18	Oct 18	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	Y-o-Y
101	110	104	109	106	104	110	109	116	103	102	105	96	95	96	104	114	111	7%

Industry Year-over-Year Trends: Five of the 12 sectors monitored by the Index, indicated positive annual growth.

- **Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides** (up eight percent) saw the most-notable year-on-year growth among industry sectors in December 2019; also the steepest since October 2018. Growth momentum improved by three percentage points vis-a-vis last month. In short-term as well, the sector fared well; up two percent (month-on-month) and up five percent (six-month).
- Long-term growth momentum in **Consumer Goods/ FMCG, Food & Packaged Food, Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery** (up three percent) paced up by four percentage points from one percent decline last month. On six-month basis, the sector recorded hike of eight percent; the steepest growth in 2019.
- **Retail/Trade and Logistics** (up three percent) sector continued to register increased hiring demand on annual basis. However, in short-term, growth underperformed on all parameters; down five percent (month-on-month), down three percent (three-month) and down four percent (six-month).
- Online recruitment activity in **Advertising, Market Research, Public Relations, Media and Entertainment** (up two percent) recovered positive growth for the first time since February 2018. On three-month and six-month (both seven percent) basis as well, the sector charted growth.
- **Engineering, Construction and Real Estate** (down 13 percent) witnessed the most-notable decline among all sectors, on-the-year. Nonetheless, pace of growth improved slightly by five percentage points compared to November (down 18 percent) 2019.

Top Growth Industries

Year-over-year Growth	Dec 18	Dec 19	% Growth Y-o-Y
Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides	101	109	8%
Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	151	156	3%
Retail/Trade and Logistics	72	74	3%
Advertising, Market Research, Public Relations, Media and Entertainment	62	63	2%
Health Care	134	136	1%

Lowest Growth Industries

Year-over-year Growth	Dec 18	Dec 19	% Growth Y-o-Y
Hospitality	93	92	-1%
Oil and Gas	68	64	-6%
IT and Telecom/ISP	240	221	-8%
BFSI	99	89	-10%
Engineering, Construction and Real Estate	114	99	-13%

Occupation Year-over-Year Trends: Growth in online demand for professionals was positive in 10 of the 11 job-roles monitored by the Index.

- **Hospitality and Travel** (up 30 percent) professionals led annual online demand in December 2019. This was also the steepest growth witnessed since the beginning of the year. In short-term as well, the job-role witnessed growth; up seven percent (three-month) and up nine percent (six-month).
- Year-on-year, **Customer service** registered double-digit growth of 27 percent; up from 24 percent in November 2019. In the last six-months (between June and December 2019), the occupation group jumped by seven percent.
- **Marketing & Communications/Arts/Creative** (up 21 percent) ranked among top growth occupations for the first time in December 2019, on-the-year. In short-run, the job-role led growth on all parameters; up three percent (month-on-month), up 11 percent (three-month) and up 15 percent (six-month).
- Online demand for **Sales and BD** professionals paced up by three percentage points between November (up 11 percent) and December (up 14 percent) 2019. Growth increased on three-month (up five percent) basis as well.
- **Engineering and Production** (down 15 percent) is the only job-role to witness decline between December 2018 and 2019.

Top Growth Occupations

Year-over-year Growth	Dec 18	Dec 19	% Growth Y-o-Y
Hospitality and Travel	90	117	30%
Customer service	75	95	27%
HR & Admin.	77	97	26%
Software, Hardware, Telecom	180	221	23%
Marketing & Communications/Arts/Creative	123	149	21%

Lowest Growth Occupations

Year-over-year Growth	Dec 18	Dec 19	% Growth Y-o-Y
Sales and BD	86	98	14%
Health Care	108	118	9%
Finance and Account	88	94	7%
Legal	98	103	5%
Engineering and Production	108	92	-15%

Geographic Year-over-year Trends: Online demand exceeded the year-ago level in three of the seven countries monitored by the Index.

- **KSA** (up 14 percent) continued to record uptrend in e-recruitment activity for the third consecutive month, on-the-year. In short-term as well, the region led growth among others; up 11 percent (three-month) and up six percent (six-month).
- Year-on-year, **Bahrain** and **Oman** also witnessed increase in hiring demand in December 2019; up nine percent and four percent respectively.
- **UAE** (down 11 percent) exhibits the most-notable year-on-year decline among the regions.

Year-over-year Growth	Dec 18	Dec 19	% Growth Y-o-Y
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KSA	107	122	14%
Bahrain	105	114	9%
Oman	105	109	4%
Egypt	95	94	-1%
Qatar	88	85	-3%
Kuwait	118	109	-8%
UAE	72	64	-11%

COUNTRY-WISE TRENDS

KSA Highlights

- Monster Employment Index **KSA** registers growth of 14 percent on-the-year.
- **Health Care** sector records the most-notable annual growth.
- **Oil and Gas** registers the steepest decline, year-on-year.
- Among occupation categories, **Hospitality and Travel** professionals are the most sought-after talent.

KSA Top Growth Industries

Year-over-year Growth	Dec 18	Dec 19	% Growth Y-o-Y
Health Care	149	200	34%
Advertising, Market Research, Public Relations, Media and Entertainment	135	180	33%
BFSI	135	179	33%

KSA Lowest Growth Industries

Year-over-year Growth	Dec 18	Dec 19	% Growth Y-o-Y
Production/Manufacturing, Automotive and Ancillary	99	99	0%
Education	109	99	-9%
Oil and Gas	126	111	-12%

KSA Top Growth Occupations

Year-over-year Growth	Dec 18	Dec 19	% Growth Y-o-Y
Hospitality and Travel	81	103	27%
Finance and Account	113	140	24%
Health Care	126	152	21%

KSA Lowest Growth Occupations

Year-over-year Growth	Dec 18	Dec 19	% Growth Y-o-Y
Software, Hardware, Telecom	198	208	5%
Engineering and Production	94	94	0%
Purchase / Logistics / Supply Chain	96	85	-11%

UAE Highlights

- Monster Employment Index **UAE** witnesses decline of 11 percent from the year-ago level.
- **Oil and Gas** leads among the monitored sectors, on-the-year.
- **Engineering, Construction and Real Estate** 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	Dec 18	Dec 19	% Growth Y-o-Y
Oil and Gas	60	69	15%
BFSI	80	90	13%
Hospitality	76	84	11%

UAE Lowest Growth Industries

Year-over-year Growth	Dec 18	Dec 19	% Growth Y-o-Y
Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides	114	101	-11%
Retail/Trade and Logistics	88	69	-22%
Engineering, Construction and Real Estate	85	57	-33%

UAE Top Growth Occupations

Year-over-year Growth	Dec 18	Dec 19	% Growth Y-o-Y
Engineering and Production	94	136	45%
Customer service	52	65	25%
Hospitality and Travel	69	79	14%

UAE Lowest Growth Occupations

Year-over-year Growth	Dec 18	Dec 19	% Growth Y-o-Y
HR & Admin.	43	33	-23%
Software, Hardware, Telecom	134	97	-28%
Sales and BD	62	42	-32%

By Industry

	2018	2019											
	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Engineering, Construction and Real Estate	114	120	127	133	115	110	116	104	93	90	90	103	99
BFSI	99	90	90	95	84	83	87	82	86	90	80	91	89
Production/Manufacturing, Automotive and Ancillary	94	95	99	104	106	103	96	102	111	103	94	101	94
Retail/Trade and Logistics	72	76	73	74	73	73	77	77	80	76	78	78	74
Oil and Gas	68	68	66	67	63	64	59	58	61	64	65	71	64
IT and Telecom/ISP	240	244	257	272	242	246	239	223	218	216	216	232	221
Hospitality	93	97	97	98	88	88	96	97	100	100	102	96	92
Education	110	116	116	120	115	110	114	111	109	105	105	106	109
Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides	101	100	104	104	108	103	104	105	109	109	105	107	109
Consumer Goods/ FMCG, Food & Packaged Food, Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	151	152	158	158	163	157	145	145	166	159	166	156	156
Health Care	134	136	128	134	135	137	138	129	134	134	137	137	136
Advertising, Market Research, Public Relations, Media and Entertainment	62	61	62	64	58	58	59	59	60	59	60	63	63

By Occupation

	2018	2019											
	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Engineering and Production	108	110	117	122	108	106	102	92	93	94	92	95	92
Finance and Account	88	100	109	112	106	101	93	92	93	91	87	94	94
HR & Admin.	77	84	88	94	80	79	96	92	93	92	88	103	97
Sales and BD	86	86	94	98	95	94	108	107	96	93	93	99	98
Purchase / Logistics / Supply Chain	94	92	97	99	106	104	106	106	109	109	107	117	112
Hospitality and Travel	90	93	95	98	101	101	107	109	107	109	110	117	117
Health Care	108	111	103	103	106	113	119	113	114	112	111	116	118
Software, Hardware, Telecom	180	195	167	190	195	198	198	202	203	210	207	222	221
Marketing & Communications/Arts/Creative	123	119	104	112	122	120	130	133	131	134	135	144	149
Customer service	75	83	94	80	76	78	89	87	90	89	89	98	95
Legal	98	100	101	106	114	112	106	104	106	104	99	107	103

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.