

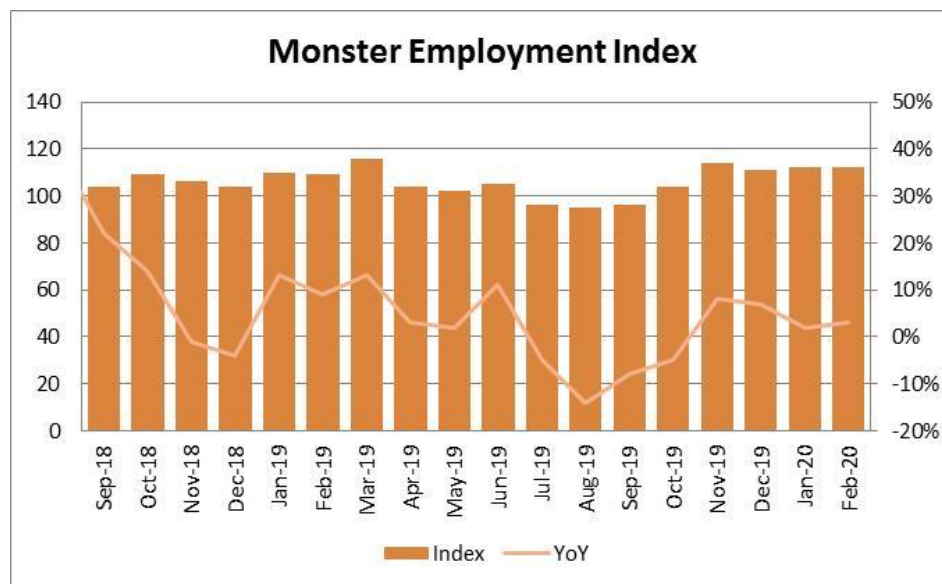
monster[®] EMPLOYMENT INDEX

Monster Employment Index Middle East

February 2020 Index Highlights

- Monster Employment Index Middle East charts annual growth of three percent in February 2020.
- Month-on-month demand saw no growth.
- Among industry sectors, Oil and Gas lead annual growth in online hiring activity.
- Engineering, Construction and Real Estate witnesses the steepest decline, on-the-year.
- Among job-roles, Marketing & Communications/Arts/Creative professionals record the most-notable growth in demand on annual basis.
- Bahrain leads year-on-year growth among regions; whereas UAE is the only country to exhibit annual decline among others.

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:

| 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 | Jan 20 | Feb 20 | Y-o-Y |
|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|-------|
| 104 | 109 | 106 | 104 | 110 | 109 | 116 | 103 | 102 | 105 | 96 | 95 | 96 | 104 | 114 | 111 | 112 | 112 | 3% |

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

- Year-on-year, **Oil and Gas** (up 29 percent) led growth in online hiring activity among industry sectors in February 2020. This was also the steepest growth registered since September 2018. In short-term as well, the sector fared well; up 29 percent (month-on-month), up 20 percent (three-month) and up 39 percent (six-month).
- **Consumer Goods/ FMCG, Food & Packaged Food, Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery** (up 12 percent) saw improved growth momentum of seven percentage points; up from five percent growth in January 2020, on-the-year. The sector ranked among top growth industries for the third consecutive month.
- Long-term growth momentum in **IT and Telecom/ISP** (up 12 percent) improved by 10 percentage points vis-à-vis last month. The sector witnessed increased demand on month-on-month (up 16 percent), three-month (up 24 percent) and six-month basis (up 32 percent) as well.
- **Retail/Trade and Logistics** (up eight percent) recovered positive growth in February 2020 following decline of four percent last month. This was also the most-notable hike since November 2019. Short-run demand also surged on month-on-month (up eight percent) and three-month (up one percent) basis.
- E-recruitment activity in **Hospitality** (up one percent) witnessed positive annual growth for the first time since December 2019. Pace of growth also improved; up from decline of four percent last month. The sector jumped five percent growth on a month-on-month basis.
- **Engineering, Construction and Real Estate** (down 26 percent) registered the most-notable annual decline among sectors in February 2020.

Top Growth Industries

| Year-over-year Growth | Feb 19 | Feb 20 | % Growth Y-o-Y |
|--|--------|--------|----------------|
| Oil and Gas | 66 | 85 | 29% |
| Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery | 158 | 177 | 12% |
| IT and Telecom/ISP | 257 | 287 | 12% |
| Retail/Trade and Logistics | 73 | 79 | 8% |
| Advertising, Market Research, Public Relations, Media and Entertainment | 62 | 67 | 8% |

Lowest Growth Industries

| Year-over-year Growth | Feb 19 | Feb 20 | % Growth Y-o-Y |
|--|--------|--------|----------------|
| Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides | 104 | 106 | 2% |
| Hospitality | 97 | 98 | 1% |
| BFSI | 90 | 89 | -1% |
| Production/Manufacturing, Automotive and Ancillary | 99 | 85 | -14% |
| Engineering, Construction and Real Estate | 127 | 94 | -26% |

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

- **Marketing & Communications/Arts/Creative** (up 44 percent) professionals recorded the steepest annual growth among occupation groups in February 2020. Growth momentum paced up by 23 percentage points vis-à-vis last month. In short-run as well, the job-role fared well; up four percent (month-on-month and three-month) and up 15 percent (six-month).
- E-recruitment activity in **Software, Hardware, Telecom** (up 34 percent) continued to witness double-digit growth since November 2019. On a month-on-month basis, the job-role experienced increased demand of two percent; up from one percent decline in January 2020.
- **Health Care** (up 25 percent) professionals witnessed the steepest year-on-year growth in online demand since September 2017. Between January and February 2020, the job-role saw improved growth rate of 12 percentage points. Even in short-term, positive growth was recorded; up three percent (month-on-month), up 11 percent (three-month) and up 13 percent (six-month).
- Annual online demand for **HR & Admin** professionals registered double-digit growth of 18 percent; up from 14 percent in January 2020. The occupation group continued to rank among the most sought-after talents. Monthly demand (up eight percent) recovered positive growth following decline in the past two months.
- **Finance and Account** (down 24 percent) saw the most-notable annual decline among occupation groups.

Top Growth Occupations

| Year-over-year Growth | Feb 19 | Feb 20 | % Growth Y-o-Y |
|--|--------|--------|----------------|
| Marketing & Communications/Arts/Creative | 104 | 150 | 44% |
| Software, Hardware, Telecom | 167 | 223 | 34% |
| Hospitality and Travel | 95 | 126 | 33% |
| Health Care | 103 | 129 | 25% |
| HR & Admin. | 88 | 104 | 18% |

Lowest Growth Occupations

| Year-over-year Growth | Feb 19 | Feb 20 | % Growth Y-o-Y |
|----------------------------|--------|--------|----------------|
| Customer service | 94 | 100 | 6% |
| Sales and BD | 94 | 98 | 4% |
| Legal | 101 | 97 | -4% |
| Engineering and Production | 117 | 92 | -21% |
| Finance and Account | 109 | 83 | -24% |

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

- **Bahrain** (up 14 percent) charted the most-notable year-on-year growth in online hiring activity among monitored countries; this was also the steepest growth since February 2019. In short-run as well, the region fared well on all parameters; up one percent (month-on-month), up two percent (three-month) and up eight percent (six-month).
- **KSA** followed closely registering a year-on-year growth of 11 percent. In short-run, the region led growth among others on all parameters. **Onam** (up six percent), **Qatar** (up two percent) and **Kuwait** (up one percent) also experienced increased hiring demand on annual basis.

- **UAE** (down three percent) is the only region to exhibit decline from the year-ago level.

| Year-over-year Growth | Feb 19 | Feb 20 | % Growth Y-o-Y |
|-----------------------|--------|--------|----------------|
| Bahrain | 103 | 117 | 14% |
| KSA | 116 | 129 | 11% |
| Oman | 106 | 112 | 6% |
| Qatar | 83 | 85 | 2% |
| Kuwait | 113 | 114 | 1% |
| Egypt | 93 | 93 | 0% |
| UAE | 72 | 70 | -3% |

COUNTRY-WISE TRENDS

KSA Highlights

- Monster Employment Index **KSA** registers growth of 11 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, **Hospitality and Travel** professionals are the most sought-after talent.

KSA Top Growth Industries

| Year-over-year Growth | Feb 19 | Feb 20 | % Growth Y-o-Y |
|--|--------|--------|----------------|
| Advertising, Market Research, Public Relations, Media and Entertainment | 138 | 192 | 39% |
| Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery | 139 | 182 | 31% |
| Health Care | 156 | 201 | 29% |

KSA Lowest Growth Industries

| Year-over-year Growth | Feb 19 | Feb 20 | % Growth Y-o-Y |
|--|--------|--------|----------------|
| Oil and Gas | 126 | 117 | -7% |
| Engineering, Construction and Real Estate | 125 | 110 | -12% |
| Production/Manufacturing, Automotive and Ancillary | 109 | 90 | -17% |

KSA Top Growth Occupations

| Year-over-year Growth | Feb 19 | Feb 20 | % Growth Y-o-Y |
|------------------------|--------|--------|----------------|
| Hospitality and Travel | 88 | 120 | 36% |

KSA Lowest Growth Occupations

| Year-over-year Growth | Feb 19 | Feb 20 | % Growth Y-o-Y |
|----------------------------|--------|--------|----------------|
| Engineering and Production | 103 | 102 | -1% |

| | | | |
|--|-----|-----|-----|
| Marketing & Communications/Arts/Creative | 111 | 151 | 36% |
| Health Care | 131 | 154 | 18% |

| | | | |
|-------------------------------------|-----|-----|-----|
| Purchase / Logistics / Supply Chain | 98 | 97 | -1% |
| Finance and Account | 147 | 135 | -8% |

UAE Highlights

- Monster Employment Index **UAE** witnesses decline of three percent from the year-ago level.
- **Oil and Gas** leads among the monitored sectors, on-the-year.
- **Production/Manufacturing, Automotive and Ancillary** registers the steepest annual decline.
- Among job-roles, **Marketing & Communications/Arts/Creative** exhibits the most-notable increase in demand, year-on-year.

UAE Top Growth Industries

| Year-over-year Growth | Feb 19 | Feb 20 | % Growth Y-o-Y |
|-----------------------|--------|--------|----------------|
| Oil and Gas | 59 | 69 | 17% |
| Hospitality | 73 | 82 | 12% |
| Education | 124 | 134 | 8% |

UAE Lowest Growth Industries

| Year-over-year Growth | Feb 19 | Feb 20 | % Growth Y-o-Y |
|--|--------|--------|----------------|
| Retail/Trade and Logistics | 94 | 74 | -21% |
| Engineering, Construction and Real Estate | 72 | 56 | -22% |
| Production/Manufacturing, Automotive and Ancillary | 98 | 73 | -26% |

UAE Top Growth Occupations

| Year-over-year Growth | Feb 19 | Feb 20 | % Growth Y-o-Y |
|--|--------|--------|----------------|
| Marketing & Communications/Arts/Creative | 82 | 120 | 46% |
| Engineering and Production | 93 | 132 | 42% |
| Customer service | 54 | 70 | 30% |

UAE Lowest Growth Occupations

| Year-over-year Growth | Feb 19 | Feb 20 | % Growth Y-o-Y |
|-----------------------|--------|--------|----------------|
| Finance and Account | 57 | 42 | -26% |
| HR & Admin. | 55 | 40 | -27% |
| Sales and BD | 69 | 44 | -36% |

By Industry

| | 2019 | | | | | | | | | | | 2020 | |
|---|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|------|-----|
| | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb |
| Engineering, Construction and Real Estate | 127 | 133 | 115 | 110 | 116 | 104 | 93 | 90 | 90 | 103 | 99 | 100 | 94 |
| BFSI | 90 | 95 | 84 | 83 | 87 | 82 | 86 | 90 | 80 | 91 | 89 | 88 | 89 |
| Production/Manufacturing, Automotive and Ancillary | 99 | 104 | 106 | 103 | 96 | 102 | 111 | 103 | 94 | 101 | 94 | 95 | 85 |
| Retail/Trade and Logistics | 73 | 74 | 73 | 73 | 77 | 77 | 80 | 76 | 78 | 78 | 74 | 73 | 79 |
| Oil and Gas | 66 | 67 | 63 | 64 | 59 | 58 | 61 | 64 | 65 | 71 | 64 | 56 | 85 |
| IT and Telecom/ISP | 257 | 272 | 242 | 246 | 239 | 223 | 218 | 216 | 216 | 232 | 221 | 218 | 287 |
| Hospitality | 97 | 98 | 88 | 88 | 96 | 97 | 100 | 100 | 102 | 96 | 92 | 93 | 98 |
| Education | 116 | 120 | 115 | 110 | 114 | 111 | 109 | 105 | 105 | 106 | 109 | 115 | 121 |
| Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides | 104 | 104 | 108 | 103 | 104 | 105 | 109 | 109 | 105 | 107 | 109 | 109 | 106 |
| Consumer Goods/ FMCG, Food & Packaged Food, Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery | 158 | 158 | 163 | 157 | 145 | 145 | 166 | 159 | 166 | 156 | 156 | 160 | 177 |
| Health Care | 128 | 134 | 135 | 137 | 138 | 129 | 134 | 134 | 137 | 137 | 136 | 146 | 138 |
| Advertising, Market Research, Public Relations, Media and Entertainment | 62 | 64 | 58 | 58 | 59 | 59 | 60 | 59 | 60 | 63 | 63 | 64 | 67 |

By Occupation

| | 2019 | | | | | | | | | | | 2020 | |
|--|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|------|-----|
| | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb |
| Engineering and Production | 117 | 122 | 108 | 106 | 102 | 92 | 93 | 94 | 92 | 95 | 92 | 94 | 92 |
| Finance and Account | 109 | 112 | 106 | 101 | 93 | 92 | 93 | 91 | 87 | 94 | 94 | 84 | 83 |
| HR & Admin. | 88 | 94 | 80 | 79 | 96 | 92 | 93 | 92 | 88 | 103 | 97 | 96 | 104 |
| Sales and BD | 94 | 98 | 95 | 94 | 108 | 107 | 96 | 93 | 93 | 99 | 98 | 97 | 98 |
| Purchase / Logistics / Supply Chain | 97 | 99 | 106 | 104 | 106 | 106 | 109 | 109 | 107 | 117 | 112 | 109 | 108 |
| Hospitality and Travel | 95 | 98 | 101 | 101 | 107 | 109 | 107 | 109 | 110 | 117 | 117 | 113 | 126 |
| Health Care | 103 | 103 | 106 | 113 | 119 | 113 | 114 | 112 | 111 | 116 | 118 | 125 | 129 |
| Software, Hardware, Telecom | 167 | 190 | 195 | 198 | 198 | 202 | 203 | 210 | 207 | 222 | 221 | 218 | 223 |
| Marketing & Communications/Arts/Creative | 104 | 112 | 122 | 120 | 130 | 133 | 131 | 134 | 135 | 144 | 149 | 144 | 150 |
| Customer service | 94 | 80 | 76 | 78 | 89 | 87 | 90 | 89 | 89 | 98 | 95 | 88 | 100 |
| Legal | 101 | 106 | 114 | 112 | 106 | 104 | 106 | 104 | 99 | 107 | 103 | 90 | 97 |

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.