

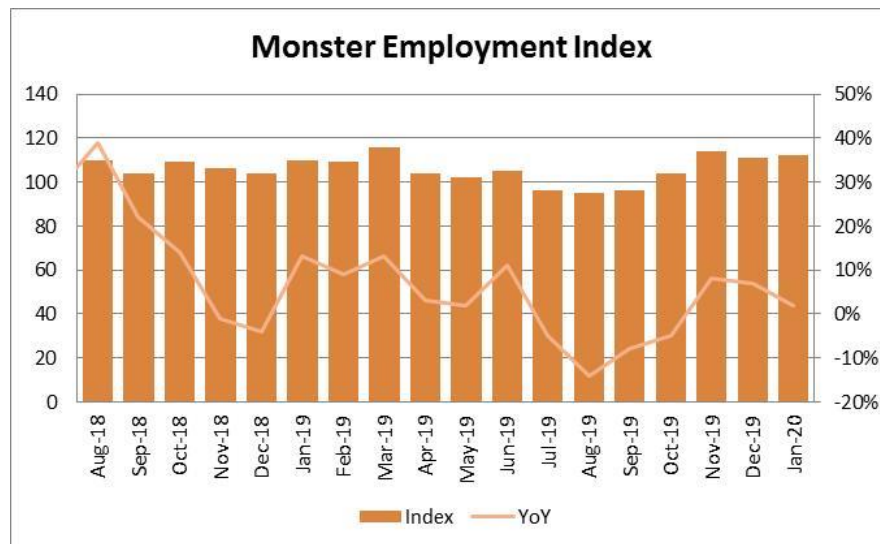
monster[®] EMPLOYMENT INDEX

Monster Employment Index Middle East

January 2020 Index Highlights

- Monster Employment Index Middle East charts annual growth of two percent in January 2020.
- Month-on-month demand increases by one 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:

| 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 | Jan 20 | Y-o-Y |
|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|-------|
| 110 | 104 | 109 | 106 | 104 | 110 | 109 | 116 | 103 | 102 | 105 | 96 | 95 | 96 | 104 | 114 | 111 | 112 | 2% |

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 nine percent) led year-on-year growth in online recruitment activity among industry sectors in January 2020. This was also the steepest hike registered since October 2018. On three-month and six-month (both up four percent) basis as well, the sector recorded positive growth.
- Year-on-year, **Health Care** (up seven percent) ranked among top hiring sectors for the second consecutive month. This was also the most-notable growth recorded since September 2018. On six-month basis, the sector leaped in demand by 13 percent.
- **Consumer Goods/ FMCG, Food & Packaged Food, Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery** (up five percent) witnessed the steepest growth in online hiring activity since November 2018, on-the-year. Monthly demand grew by three percent; up from no growth in December 2019.
- **Advertising, Market Research, Public Relations, Media and Entertainment** (up five percent) saw improved annual growth momentum of three percentage points; up from two percent last month. The sector fared well in the short-run as well; up two percent (month-on-month), up seven percent (three-month) and up eight percent (six-month).
- E-recruitment activity in **IT and Telecom/ISP** (up two percent) recovered positive growth following decline of eight percent in December 2019, on-the-year. In short-term, the sector witnessed increased demand for talents on all parameters; up 12 percent (month-on-month), up 15 percent (three-month) and up 11 percent (six-month).
- **Engineering, Construction and Real Estate** (down 17 percent) registered the most-notable annual decline among sectors in January 2020.

Top Growth Industries

| Year-over-year Growth | Jan 19 | Jan 20 | % Growth Y-o-Y |
|--|--------|--------|----------------|
| Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides | 100 | 109 | 9% |
| Health Care | 136 | 146 | 7% |
| Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery | 152 | 160 | 5% |
| Advertising, Market Research, Public Relations, Media and Entertainment | 61 | 64 | 5% |
| IT and Telecom/ISP | 244 | 248 | 2% |

Lowest Growth Industries

| Year-over-year Growth | Jan 19 | Jan 20 | % Growth Y-o-Y |
|---|--------|--------|----------------|
| BFSI | 90 | 88 | -2% |
| Oil and Gas | 68 | 66 | -3% |
| Retail/Trade and Logistics | 76 | 73 | -4% |
| Hospitality | 97 | 93 | -4% |
| Engineering, Construction and Real Estate | 120 | 100 | -17% |

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

- Online demand for **Hospitality and Travel** (up 22 percent) professionals was highest for the second consecutive month on annual basis. The job-role has been registering double-digit growth since April 2019. On three-month (up three percent) and six-month (up four percent) basis as well, positive growth was registered.
- **Marketing & Communications/Arts/Creative** (up 21 percent) witnessed same annual growth as in December 2019; also exhibited double-digit growth for the third month in a row. In short-term, the occupation category charted growth of seven percent and eight percent on three-month and six-month basis respectively. **Sales and BD** (up 13 percent) ranked among top growth occupations for the first time since October 2019, on-the-year. However, month-on-month, the job-role saw marginal decline of one percent in January 2020.
- Long-term growth momentum for **Health Care** (up 13 percent) professionals improved by four percentage points; up from nine percent in December 2019. In the last six months (between July 2019 and January 2020), the job-role saw the steepest growth among others; up by 11 percent.
- **Finance and Account** (down 16 percent) followed by **Engineering and Production** (down 15 percent) saw the most-notable annual decline among occupation groups.

Top Growth Occupations

| Year-over-year Growth | Jan 19 | Jan 20 | % Growth Y-o-Y |
|--|--------|--------|----------------|
| Hospitality and Travel | 93 | 113 | 22% |
| Marketing & Communications/Arts/Creative | 119 | 144 | 21% |
| Purchase / Logistics / Supply Chain | 92 | 109 | 18% |
| HR & Admin. | 84 | 96 | 14% |
| Sales and BD | 86 | 97 | 13% |

Lowest Growth Occupations

| Year-over-year Growth | Jan 19 | Jan 20 | % Growth Y-o-Y |
|-----------------------------|--------|--------|----------------|
| Software, Hardware, Telecom | 195 | 218 | 12% |
| Customer service | 83 | 88 | 6% |
| Legal | 100 | 90 | -10% |
| Engineering and Production | 110 | 94 | -15% |
| Finance and Account | 100 | 84 | -16% |

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

- **KSA** (up 12 percent) continued to record the steepest uptrend in e-recruitment activity since October 2019 on annual basis. The region witnessed positive growth in short-run as well; up four percent (month-on-month), up eight percent (three-month) and up 19 percent (six-month).
- Year-on-year, **Bahrain** (up eight percent), **Qatar** (up seven percent), **Kuwait** (up six percent), **Oman** (up five percent) and **Egypt** (up one percent) also witnessed increase in hiring demand in January 2020.
- **UAE** (down 14 percent) is the only region to exhibit decline from the year-ago level.

| Year-over-year Growth | Jan 19 | Jan 20 | % Growth Y-o-Y |
|-----------------------|--------|--------|----------------|
| KSA | 113 | 127 | 12% |
| Bahrain | 107 | 116 | 8% |
| Qatar | 86 | 92 | 7% |
| Kuwait | 108 | 114 | 6% |
| Oman | 109 | 114 | 5% |
| Egypt | 93 | 94 | 1% |
| UAE | 77 | 66 | -14% |

COUNTRY-WISE TRENDS

KSA Highlights

- Monster Employment Index **KSA** registers growth of 12 percent on-the-year.
- **Advertising, Market Research, Public Relations, Media and Entertainment** 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 | Jan 19 | Jan 20 | % Growth Y-o-Y |
|---|--------|--------|----------------|
| Advertising, Market Research, Public Relations, Media and Entertainment | 129 | 183 | 42% |
| Health Care | 153 | 213 | 39% |
| IT and Telecom/ISP | 180 | 215 | 19% |

KSA Lowest Growth Industries

| Year-over-year Growth | Jan 19 | Jan 20 | % Growth Y-o-Y |
|---|--------|--------|----------------|
| Hospitality | 94 | 92 | -2% |
| Engineering, Construction and Real Estate | 119 | 116 | -3% |
| Oil and Gas | 124 | 109 | -12% |

KSA Top Growth Occupations

| Year-over-year Growth | Jan 19 | Jan 20 | % Growth Y-o-Y |
|-----------------------------|--------|--------|----------------|
| Hospitality and Travel | 82 | 110 | 34% |
| Sales and BD | 117 | 144 | 23% |
| Software, Hardware, Telecom | 195 | 233 | 19% |

KSA Lowest Growth Occupations

| Year-over-year Growth | Jan 19 | Jan 20 | % Growth Y-o-Y |
|-------------------------------------|--------|--------|----------------|
| Engineering and Production | 96 | 103 | 7% |
| Purchase / Logistics / Supply Chain | 95 | 99 | 4% |
| Finance and Account | 136 | 135 | -1% |

UAE Highlights

- Monster Employment Index **UAE** witnesses decline of 14 percent from the year-ago level.
- **BFSI** 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 | Jan 19 | Jan 20 | % Growth Y-o-Y |
|-----------------------|--------|--------|----------------|
| BFSI | 81 | 99 | 22% |
| Education | 115 | 139 | 21% |
| Hospitality | 75 | 83 | 11% |

UAE Lowest Growth Industries

| Year-over-year Growth | Jan 19 | Jan 20 | % Growth Y-o-Y |
|--|--------|--------|----------------|
| Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery | 137 | 128 | -7% |
| Engineering, Construction and Real Estate | 81 | 67 | -17% |
| Retail/Trade and Logistics | 107 | 77 | -28% |

UAE Top Growth Occupations

| Year-over-year Growth | Jan 19 | Jan 20 | % Growth Y-o-Y |
|--|--------|--------|----------------|
| Engineering and Production | 104 | 143 | 38% |
| Customer service | 53 | 65 | 23% |
| Marketing & Communications/Arts/Creative | 101 | 119 | 18% |

UAE Lowest Growth Occupations

| Year-over-year Growth | Jan 19 | Jan 20 | % Growth Y-o-Y |
|-----------------------------|--------|--------|----------------|
| HR & Admin. | 48 | 38 | -21% |
| Sales and BD | 60 | 43 | -28% |
| Software, Hardware, Telecom | 159 | 106 | -33% |

By Industry

| | 2019 | | | | | | | | | | | | 2020 |
|---|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|------|
| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan |
| Engineering, Construction and Real Estate | 120 | 127 | 133 | 115 | 110 | 116 | 104 | 93 | 90 | 90 | 103 | 99 | 100 |
| BFSI | 90 | 90 | 95 | 84 | 83 | 87 | 82 | 86 | 90 | 80 | 91 | 89 | 88 |
| Production/Manufacturing, Automotive and Ancillary | 95 | 99 | 104 | 106 | 103 | 96 | 102 | 111 | 103 | 94 | 101 | 94 | 95 |
| Retail/Trade and Logistics | 76 | 73 | 74 | 73 | 73 | 77 | 77 | 80 | 76 | 78 | 78 | 74 | 73 |
| Oil and Gas | 68 | 66 | 67 | 63 | 64 | 59 | 58 | 61 | 64 | 65 | 71 | 64 | 56 |
| IT and Telecom/ISP | 244 | 257 | 272 | 242 | 246 | 239 | 223 | 218 | 216 | 216 | 232 | 221 | 218 |
| Hospitality | 97 | 97 | 98 | 88 | 88 | 96 | 97 | 100 | 100 | 102 | 96 | 92 | 93 |
| Education | 116 | 116 | 120 | 115 | 110 | 114 | 111 | 109 | 105 | 105 | 106 | 109 | 115 |
| Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides | 100 | 104 | 104 | 108 | 103 | 104 | 105 | 109 | 109 | 105 | 107 | 109 | 109 |
| Consumer Goods/ FMCG, Food & Packaged Food, Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery | 152 | 158 | 158 | 163 | 157 | 145 | 145 | 166 | 159 | 166 | 156 | 156 | 160 |
| Health Care | 136 | 128 | 134 | 135 | 137 | 138 | 129 | 134 | 134 | 137 | 137 | 136 | 146 |
| Advertising, Market Research, Public Relations, Media and Entertainment | 61 | 62 | 64 | 58 | 58 | 59 | 59 | 60 | 59 | 60 | 63 | 63 | 64 |

By Occupation

| | 2019 | | | | | | | | | | | | 2020 |
|--|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|------|
| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan |
| Engineering and Production | 110 | 117 | 122 | 108 | 106 | 102 | 92 | 93 | 94 | 92 | 95 | 92 | 94 |
| Finance and Account | 100 | 109 | 112 | 106 | 101 | 93 | 92 | 93 | 91 | 87 | 94 | 94 | 84 |
| HR & Admin. | 84 | 88 | 94 | 80 | 79 | 96 | 92 | 93 | 92 | 88 | 103 | 97 | 96 |
| Sales and BD | 86 | 94 | 98 | 95 | 94 | 108 | 107 | 96 | 93 | 93 | 99 | 98 | 97 |
| Purchase / Logistics / Supply Chain | 92 | 97 | 99 | 106 | 104 | 106 | 106 | 109 | 109 | 107 | 117 | 112 | 109 |
| Hospitality and Travel | 93 | 95 | 98 | 101 | 101 | 107 | 109 | 107 | 109 | 110 | 117 | 117 | 113 |
| Health Care | 111 | 103 | 103 | 106 | 113 | 119 | 113 | 114 | 112 | 111 | 116 | 118 | 125 |
| Software, Hardware, Telecom | 195 | 167 | 190 | 195 | 198 | 198 | 202 | 203 | 210 | 207 | 222 | 221 | 218 |
| Marketing & Communications/Arts/Creative | 119 | 104 | 112 | 122 | 120 | 130 | 133 | 131 | 134 | 135 | 144 | 149 | 144 |
| Customer service | 83 | 94 | 80 | 76 | 78 | 89 | 87 | 90 | 89 | 89 | 98 | 95 | 88 |
| Legal | 100 | 101 | 106 | 114 | 112 | 106 | 104 | 106 | 104 | 99 | 107 | 103 | 90 |

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.