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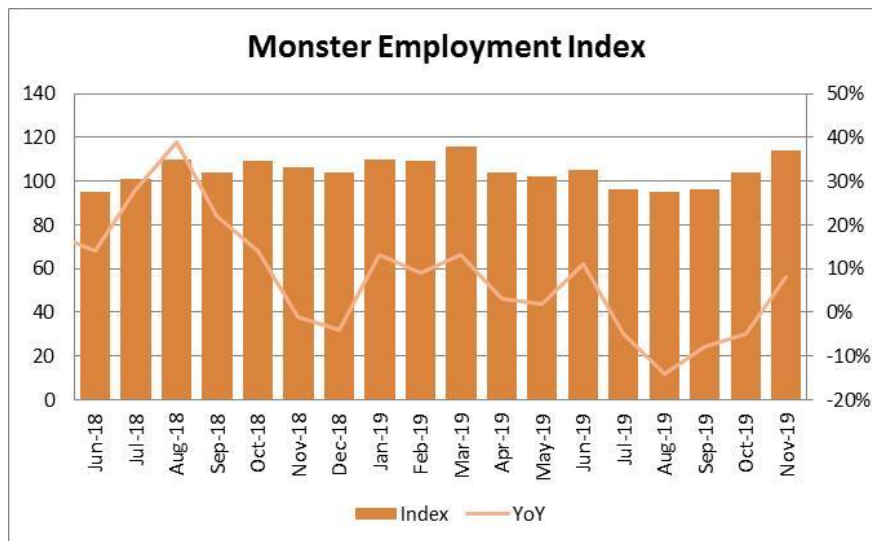
EMPLOYMENT INDEX

Monster Employment Index Middle East

November 2019 Index Highlights

- Monster Employment Index Middle East registers annual growth of eight percent in November 2019.
- Month-on-month, e-recruitment activity witnessed 10 percent growth.
- Among industry sectors, Hospitality leads annual growth in online recruitment activity.
- Engineering, Construction and Real Estate witnesses the steepest decline, on-the-year.
- Among job-roles, HR & Admin professionals record the most-notable growth in demand on annual basis.
- KSA leads year-on-year growth among regions. Online recruitment in Egypt 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:

Jun 18	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	Y-o-Y
95	101	110	104	109	106	104	110	109	116	103	102	105	96	95	96	104	114	8%

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

- **Hospitality** (up nine percent) led annual growth in online hiring activity among others in November 2019. The sector witnessed positive growth for the seventh consecutive month. In short-term (six-month) as well increased demand was recorded; up at nine percent.
- E-recruitment activity in **Retail/Trade and Logistics** (up seven percent) continued to register uptrend since March 2019 on annual basis. However, on a month-on-month (zero percent) basis, the sector saw no growth this month; down from three percent in October 2019.
- **IT and Telecom/ISP** (up two percent) recovered positive year-on-year growth for the first time since August 2019. Growth momentum improved by seven percentage points; up from five percent decline in October 2019. On month-on-month (up seven percent) and three-month (up six percent) basis as well, the sector charted uptrend in hiring activity.
- **Advertising, Market Research, Public Relations, Media and Entertainment** (zero percent) matched the corresponding period a year-ago. Nonetheless, growth rate improved slightly; up from decline of five percent last month. The sector also witnessed increased demand for talents in the short-run; up five percent (month-on-month and three-month) and up nine percent (six-month).
- **BFSI** saw eased pace of annual decline between October (down 11 percent) and November (down three percent) 2019; indicating improving hiring trends in the job market. In the short-term as well; the sector fared well on all other parameters; up 14 percent (month-on-month); up six percent (three-month) and up 10 percent (six-month).
- **Engineering, Construction and Real Estate** (down 18 percent) witnessed the most-notable decline among all sectors, on-the-year.

Top Growth Industries

Year-over-year Growth	Nov 18	Nov 19	% Growth Y-o-Y
Hospitality	88	96	9%
Retail/Trade and Logistics	73	78	7%
Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides	102	107	5%
IT and Telecom/ISP	227	232	2%
Production/Manufacturing, Automotive and Ancillary	101	101	0%

Lowest Growth Industries

Year-over-year Growth	Nov 18	Nov 19	% Growth Y-o-Y
Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	158	156	-1%
Education	109	106	-3%
BFSI	94	91	-3%
Oil and Gas	74	71	-4%
Engineering, Construction and Real Estate	125	103	-18%

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

- **HR & Admin** (up 30 percent) professionals experienced the most-notable demand among job-roles between November 2018 and 2019. Growth momentum paced up by 17 percentage points vis-a-vis last month. In short-run as well, the job-role led growth on all parameters; up 17 percent (month-on-month), up 11 percent (three-month) and up 30 percent (six-month).
- Annual online demand for **Customer service** (up 24 percent) professionals continued to register double-digit growth since the beginning of 2019; also ranked among top growth occupations this month.
- **Purchase / Logistics / Supply Chain** (up 22 percent) saw the most-notable year-on-year growth since July 2015. Pace of growth also improved; up from 13 percent in October 2019. In the last six-months (between May and November 2019), the job role exhibited increased demand of 13 percent.
- Year-on-year, **Marketing & Communications/Arts/Creative** (up 20 percent) witnessed steepest growth since July 2019. On a month-on-month basis, hike of seven percent was recorded.
- **Health Care** professionals saw increased demand of 13 percent from the year-ago level in November 2019. Moreover, in short-term, the job-role charted positive growth; up five percent (month-on-month), up two percent (three-month) and up three percent (six-month).
- **Engineering and Production** (down 19 percent) witnessed the steepest annual decline among the monitored occupation groups.

Top Growth Occupations

Year-over-year Growth	Nov 18	Nov 19	% Growth Y-o-Y
HR & Admin.	79	103	30%
Software, Hardware, Telecom	173	222	28%
Hospitality and Travel	92	117	27%
Customer service	79	98	24%
Purchase / Logistics / Supply Chain	96	117	22%

Lowest Growth Occupations

Year-over-year Growth	Nov 18	Nov 19	% Growth Y-o-Y
Health Care	103	116	13%
Sales and BD	89	99	11%
Legal	104	107	3%
Finance and Account	96	94	-2%
Engineering and Production	117	95	-19%

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

- **KSA** (up 16 percent) saw the steepest year-on-year growth in online recruitment activity among the monitored regions. This was also the highest growth since May 2019. In short-run as well, KSA witnessed increased demand for talents; up three percent (month-on-month), up eight (three-month) and up seven percent (six-month).
- Year-on-year, **Bahrain** recorded double-digit growth of 13 percent; up from five percent growth in September 2019. On a month-on-month basis, the region exhibited uptrend of four percent in e-recruitment activity.

- **Onam** (up three percent), **UAE** (up one percent) and **Kuwait** (up one percent) also charted positive annual growth this month.
- **Qatar** (down two percent) and **Egypt** (down three percent) are the only regions to exhibit decline among the countries on annual basis.

Year-over-year Growth	Nov 18	Nov 19	% Growth Y-o-Y
KSA	105	122	16%
Bahrain	102	115	13%
Oman	107	110	3%
UAE	69	70	1%
Kuwait	115	116	1%
Qatar	92	90	-2%
Egypt	96	93	-3%

COUNTRY-WISE TRENDS

KSA Highlights

- Monster Employment Index **KSA** registers growth of 16 percent on-the-year.
- **Health Care** sector records the most-notable annual growth.
- **Education** 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	Nov 18	Nov 19	% Growth Y-o-Y
Health Care	147	193	31%
Advertising, Market Research, Public Relations, Media and Entertainment	133	172	29%
BFSI	133	165	24%

KSA Lowest Growth Industries

Year-over-year Growth	Nov 18	Nov 19	% Growth Y-o-Y
Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	143	136	-5%
Oil and Gas	124	112	-10%
Education	108	95	-12%

KSA Top Growth Occupations

Year-over-year Growth	Nov 18	Nov 19	% Growth Y-o-Y
Hospitality and Travel	75	108	44%
Finance and Account	115	145	26%

KSA Lowest Growth Occupations

Year-over-year Growth	Nov 18	Nov 19	% Growth Y-o-Y
Engineering and Production	95	98	3%
Software, Hardware, Telecom	197	199	1%

Sales and BD	113	142	26%
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Purchase / Logistics / Supply Chain	97	95	-2%
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UAE Highlights

- Monster Employment Index **UAE** witnesses annual growth of one percent.
- **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	Nov 18	Nov 19	% Growth Y-o-Y
Oil and Gas	61	81	33%
Hospitality	73	87	19%
IT and Telecom/ISP	102	117	15%

UAE Lowest Growth Industries

Year-over-year Growth	Nov 18	Nov 19	% Growth Y-o-Y
Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides	115	101	-12%
Retail/Trade and Logistics	92	73	-21%
Engineering, Construction and Real Estate	92	63	-32%

UAE Top Growth Occupations

Year-over-year Growth	Nov 18	Nov 19	% Growth Y-o-Y
Engineering and Production	102	137	34%
Customer service	52	65	25%
Hospitality and Travel	68	80	18%

UAE Lowest Growth Occupations

Year-over-year Growth	Nov 18	Nov 19	% Growth Y-o-Y
HR & Admin.	41	34	-17%
Sales and BD	60	47	-22%
Software, Hardware, Telecom	131	100	-24%

By Industry

	2018		2019										
	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
Engineering, Construction and Real Estate	125	114	120	127	133	115	110	116	104	93	90	90	103
BFSI	94	99	90	90	95	84	83	87	82	86	90	80	91
Production/Manufacturing, Automotive and Ancillary	101	94	95	99	104	106	103	96	102	111	103	94	101
Retail/Trade and Logistics	73	72	76	73	74	73	73	77	77	80	76	78	78
Oil and Gas	74	68	68	66	67	63	64	59	58	61	64	65	71
IT and Telecom/ISP	227	240	244	257	272	242	246	239	223	218	216	216	232
Hospitality	88	93	97	97	98	88	88	96	97	100	100	102	96
Education	109	110	116	116	120	115	110	114	111	109	105	105	106
Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides	102	101	100	104	104	108	103	104	105	109	109	105	107
Consumer Goods/ FMCG, Food & Packaged Food, Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	158	151	152	158	158	163	157	145	145	166	159	166	156
Health Care	137	134	136	128	134	135	137	138	129	134	134	137	137
Advertising, Market Research, Public Relations, Media and Entertainment	63	62	61	62	64	58	58	59	59	60	59	60	63

By Occupation

	2018		2019										
	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
Engineering and Production	117	108	110	117	122	108	106	102	92	93	94	92	95
Finance and Account	96	88	100	109	112	106	101	93	92	93	91	87	94
HR & Admin.	79	77	84	88	94	80	79	96	92	93	92	88	103
Sales and BD	89	86	86	94	98	95	94	108	107	96	93	93	99
Purchase / Logistics / Supply Chain	96	94	92	97	99	106	104	106	106	109	109	107	117
Hospitality and Travel	92	90	93	95	98	101	101	107	109	107	109	110	117
Health Care	103	108	111	103	103	106	113	119	113	114	112	111	116
Software, Hardware, Telecom	173	180	195	167	190	195	198	198	202	203	210	207	222
Marketing & Communications/Arts/Creative	120	123	119	104	112	122	120	130	133	131	134	135	144
Customer service	79	75	83	94	80	76	78	89	87	90	89	89	98
Legal	104	98	100	101	106	114	112	106	104	106	104	99	107

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.