

# The Bayt.com Working Women in the Middle East Survey

December 2016



## Objectives

- The Bayt.com Working Women in the Middle East Survey explores the status of working women in the Middle East and North Africa (MENA).
- Among other key insights, the survey analyzes the perceptions of women in the region when it comes to equality at work.
- It also looks into their motivations for employment, challenges faced at work, as well as career and life ambitions.

Section 1

# RESEARCH METHODOLOGY

# Sample definition

**All respondents were working females**

## **Age**

Aged 18 years and above

## **Nationalities**

GCC Arabs, North Africans, Levantines, Westerners, Asians, Others

## **Country of Residence**

GCC: UAE, KSA, Kuwait, Oman (\*), Qatar, Bahrain (\*)

Levant: Lebanon, Jordan, Syria (\*)

North Africa: Egypt, Morocco, Algeria, Tunisia

(\*) Low bases

## **Data Collection**

All data was collected online. Fieldwork was done from November 6<sup>th</sup> to 22<sup>nd</sup> 2016. The total number of respondents achieved was 888.

Section 2

# RESPONDENT PROFILE

# Respondent Profile (1/4)

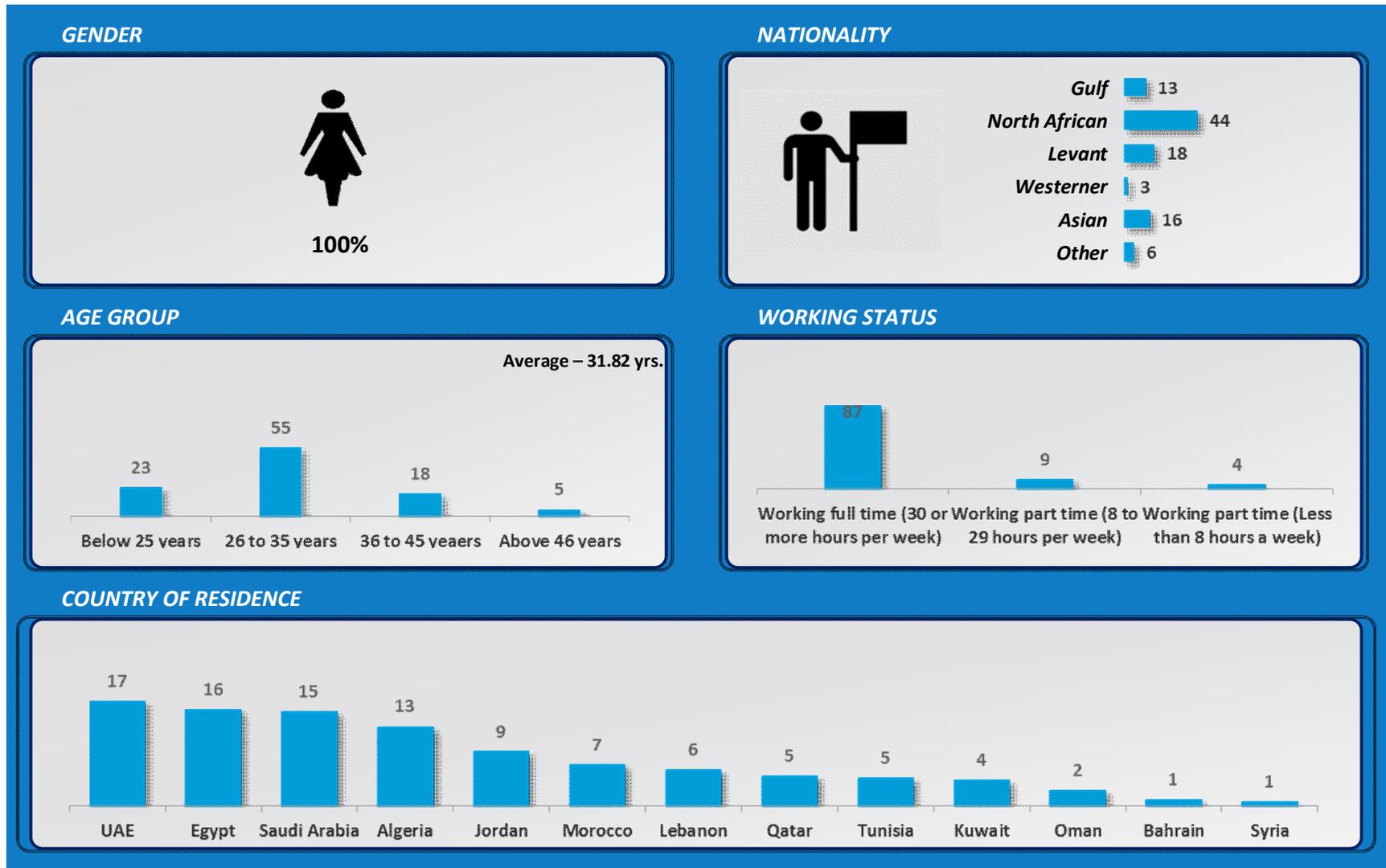


Fig in %

Base: All respondents (n=888)

# Respondent Profile (2/4)

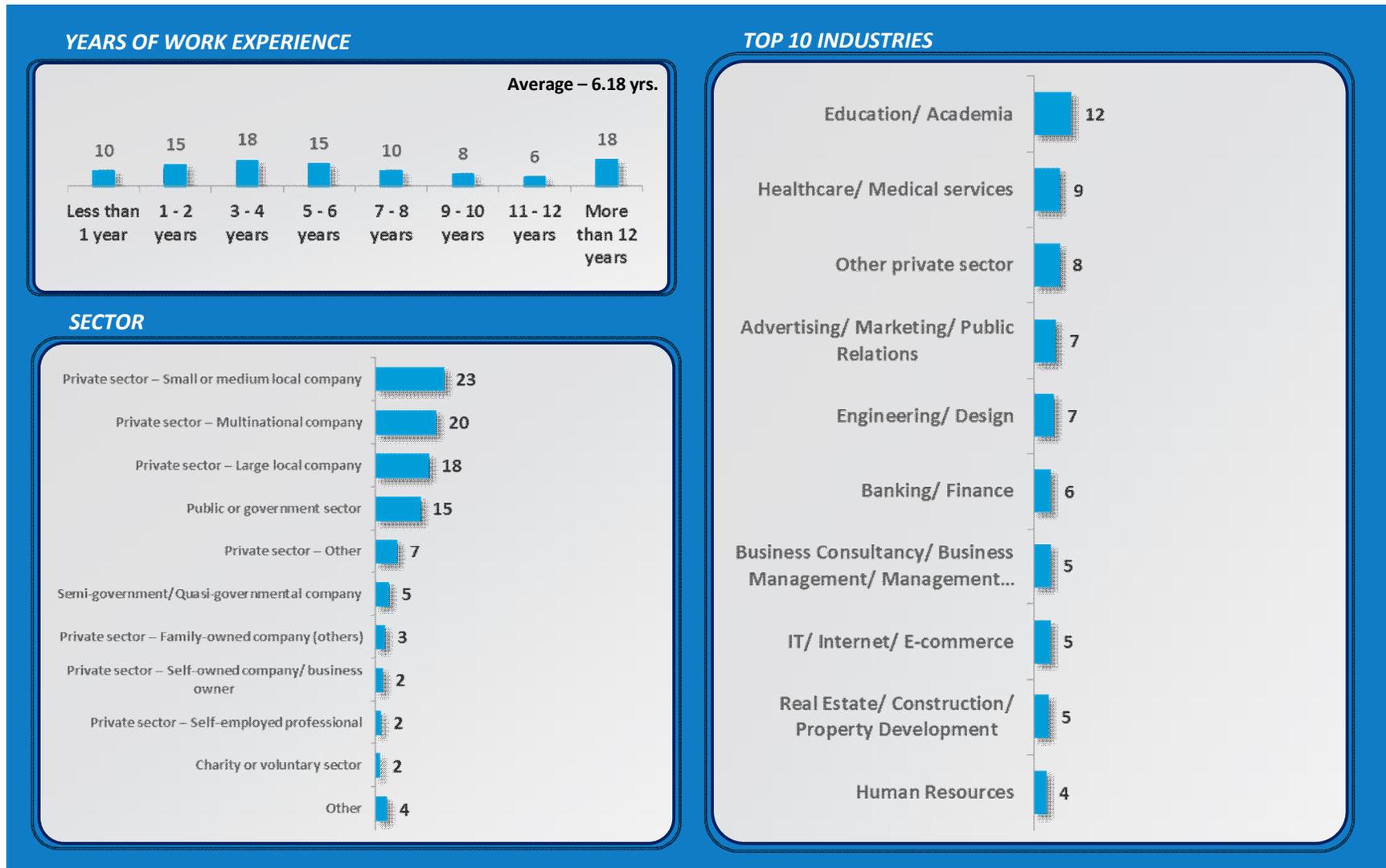
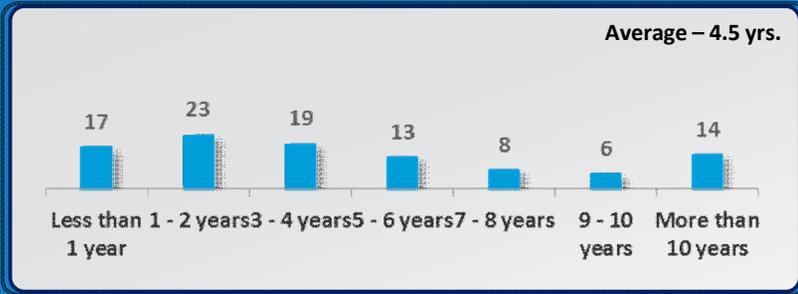


Fig in %

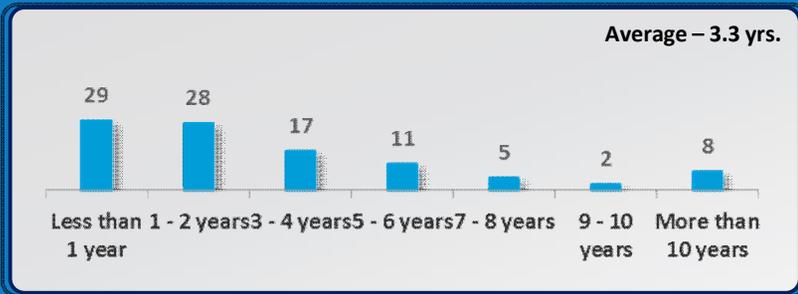
Base: All respondents (n=888)

# Respondent Profile (3/4)

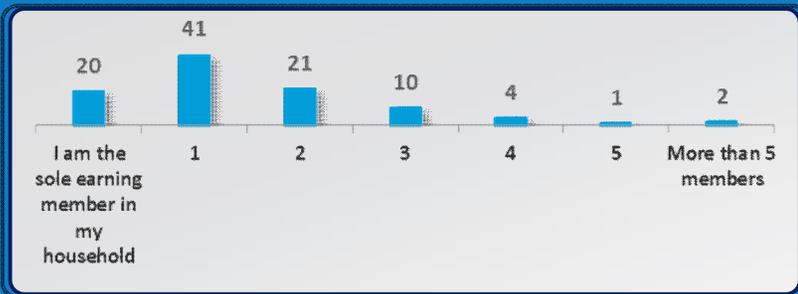
## NO. OF YEARS IN CURRENT INDUSTRY



## NO. OF YEARS IN CURRENT COMPANY



## NO. OF EARNING MEMBERS IN THE FAMILY



## TOP 10 POSITIONS



Fig in %

Base: All respondents (n=888)

# Respondent Profile (4/4)

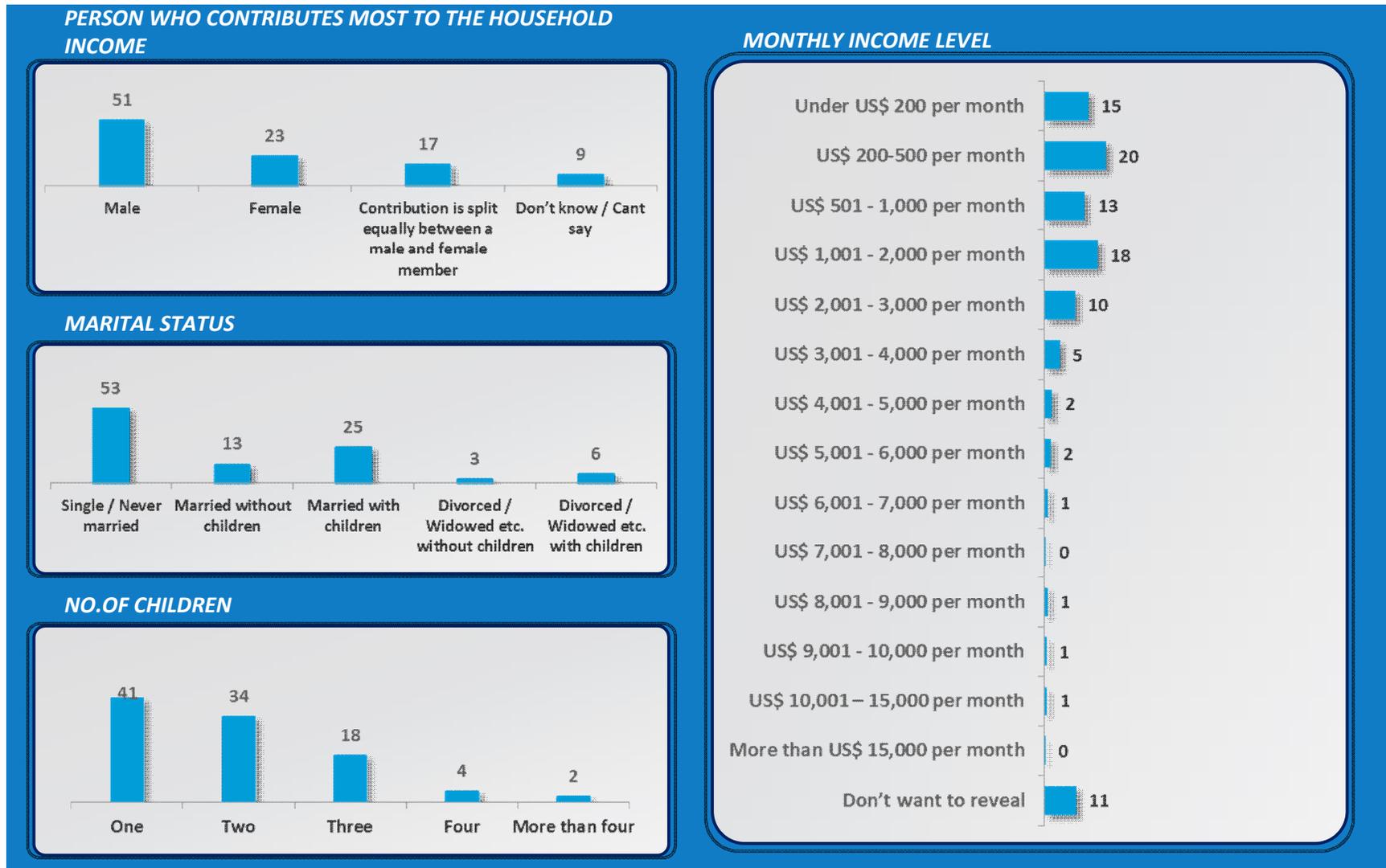


Fig in %

Base: All respondents (n=888)

Section 3

# EXECUTIVE SUMMARY

## Summary and key results (1/5)

### Reasons for working & Future aspirations

- Financial independence emerges as the top reason for working (57%) followed by need to widen perspective in life (50%)
- Top 3 drivers to switch jobs are: Better salary (67%), Better benefits (34%) and Higher designation (23%)

### Working in mix gender environment

- Overall, 90% of respondents work in a mix gender environment except for Saudi Arabia where the proportion of mixed gender workplace is lowest (74%)
- 75% claim to be comfortable in a mix gender environment with only 6% expressing their discomfort in working with male colleagues. The comfort factor is highest in Lebanon (85%) while its lowest in North African countries like Algeria & Tunisia.
- 80% of the respondents currently have male managers. Interestingly, when asked about future preference , only 4% prefer to have female manager while 26% prefer to have male managers & 69% have no preference

## Summary and key results (2/5)

### Gender Equality at work place

- Overall, 48% females feel that they are treated at par with their male colleagues while one in three (33%) feel that males are given preferential treatment over females.
- In general, females feel much stronger gender bias when it comes to remuneration, career progression and even during recruitment. They perceive less discrimination in regards to working hours and training & development of employees
  - 63% of respondents claim to work as much as their male colleagues while only 8% said that their work hours are less than their male counterparts.
  - However, when it comes to salary only 34% perceive that they are at par with their male counterparts. In fact, 50% feel that they get paid less. This perception varies by region where in North African countries like Algeria & Tunisia - majority feel at par with male colleagues, in GCC countries like UAE & KSA - females perceive that they are paid less than males.
  - Similar trend but with lesser skew is observed for promotions & career progression, where 41% perceive to have lower chance of being promoted than their male counter parts and only 48% feel its purely on basis of performance. Similar to salary trends, more females in Algeria & Tunisia feel its entirely based on performance while in KSA & UAE it's the other way around.

## Summary and key results (3/5)

- Majority of the females (64%) said their company doesn't provide any special benefits to women per se with exception to Lebanon & Jordan where they claim to have some additional benefits over male counterparts
- When it comes to recruitment, almost half (48%) said that they were asked questions about their future plans for marriage/ family planning. This being highest in Egypt (61%) and lowest in Morocco (29%)
- Apart from gender bias, 58% feel that some employees do get preferential treatment at their work place.

### Employee welfare & fringe benefits

- Personal health insurance (48%), Paid maternity leave (35%) and Transport allowance/ assistance (31%) are the top 3 additional benefits provided by the employers.
- Although majority said that they get maternity leave, only 8 % expressed their satisfaction with the duration of leave with 33% expressing low levels of satisfaction.
- Majority (60%) claims that their company doesn't provide any paternity leave.

## Summary and key results (4/5)

### Work life balance & future challenges

- Lack of good opportunities (57%), inability to upgrade professional skill set (43%), limited time for relaxation & socializing (38%), Concerns about healthy lifestyle (37%) and challenge to maintain work-family balance (29%) are the top 5 challenges working women face currently in their life.
- When it comes to professional challenges, “Less opportunity for promotions” – 51%, “Stressful work environment” – 39%, “Insufficient training & coaching” – 35%, “Lack of flexible work timings” - 31% and “Lack of job security” - 30% tops the list.
- Success in their career (50%) followed by a healthy lifestyle (43%) and travelling (37%) are the top drivers of respondents’ happiness.
- Majority (56%) of unmarried working women feel that their future marriage plan will affect their career choices. While those who are already married, 33% feel that their marital life has been positively impacted by their career choice while 26% said it had a negative impact. While among those who have kids, 70% feels that their decision to have children had impacted their career to a smaller or larger extent.

## Summary and key results (5/5)

### **Familiarity with Government policies**

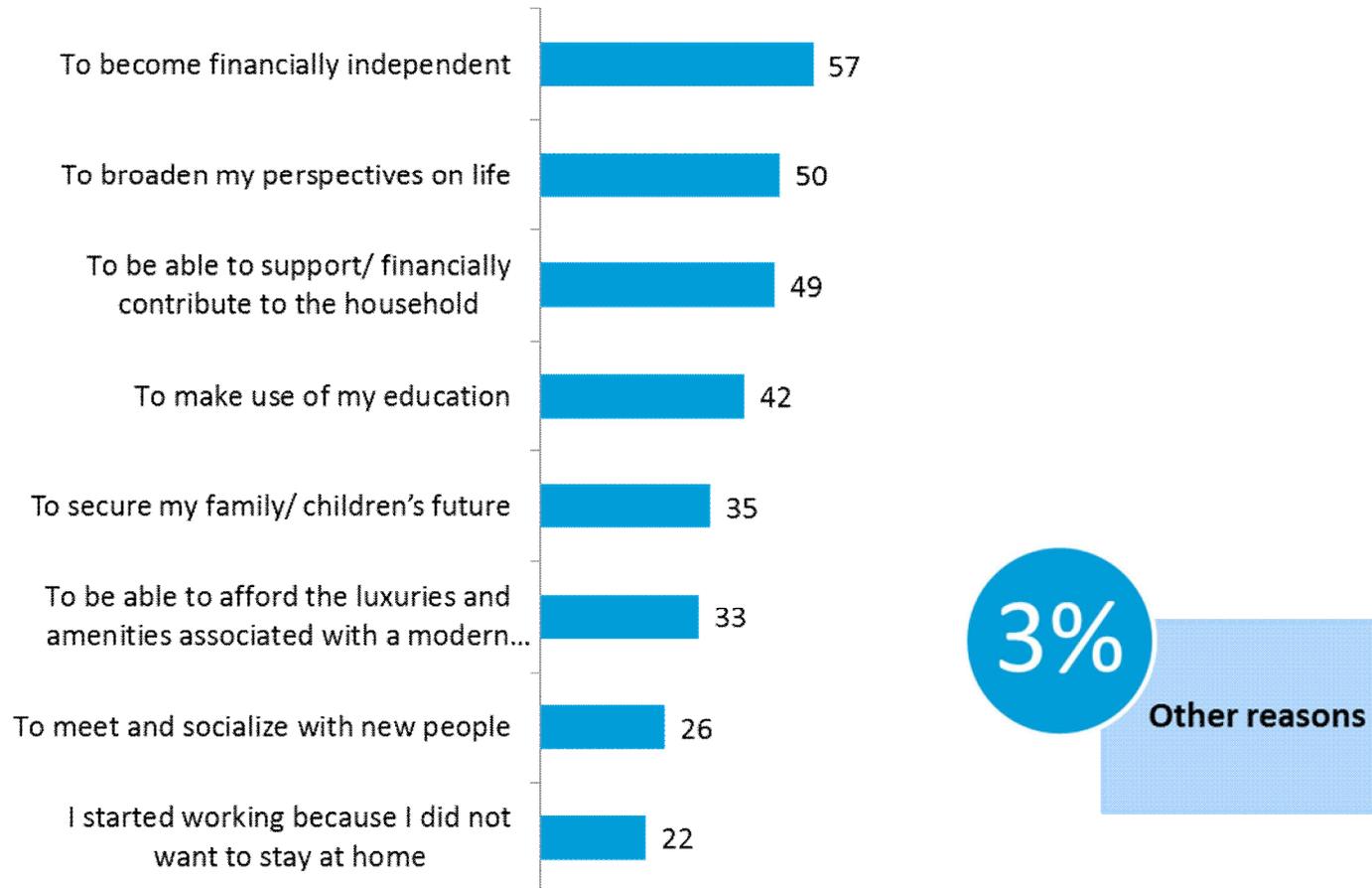
- 44% working women are very familiar and 47% are somewhat familiar with the labor laws of the country in which they work. Familiarity with laws is highest in Tunisia (60%) followed by Jordan (56%) while being lowest in Egypt (34%)
- Overall, 19% of respondents reported that the labor laws are fair to women to a large extent and 56% said that they are fair to some extent. This perception is highest in UAE (34%) while its low in Saudi Arabia (15%) and Egypt (7%).

Section 4

# RESEARCH FINDINGS

## Reasons for seeking employment

Top 3 reasons women seek employment in this region are financial independence (57%), to broaden perspectives on life (50%) and to be able to support / financially contribute to the household (49%).



Q. People like you have cited various reasons for seeking employment. Please select all those that apply to you.

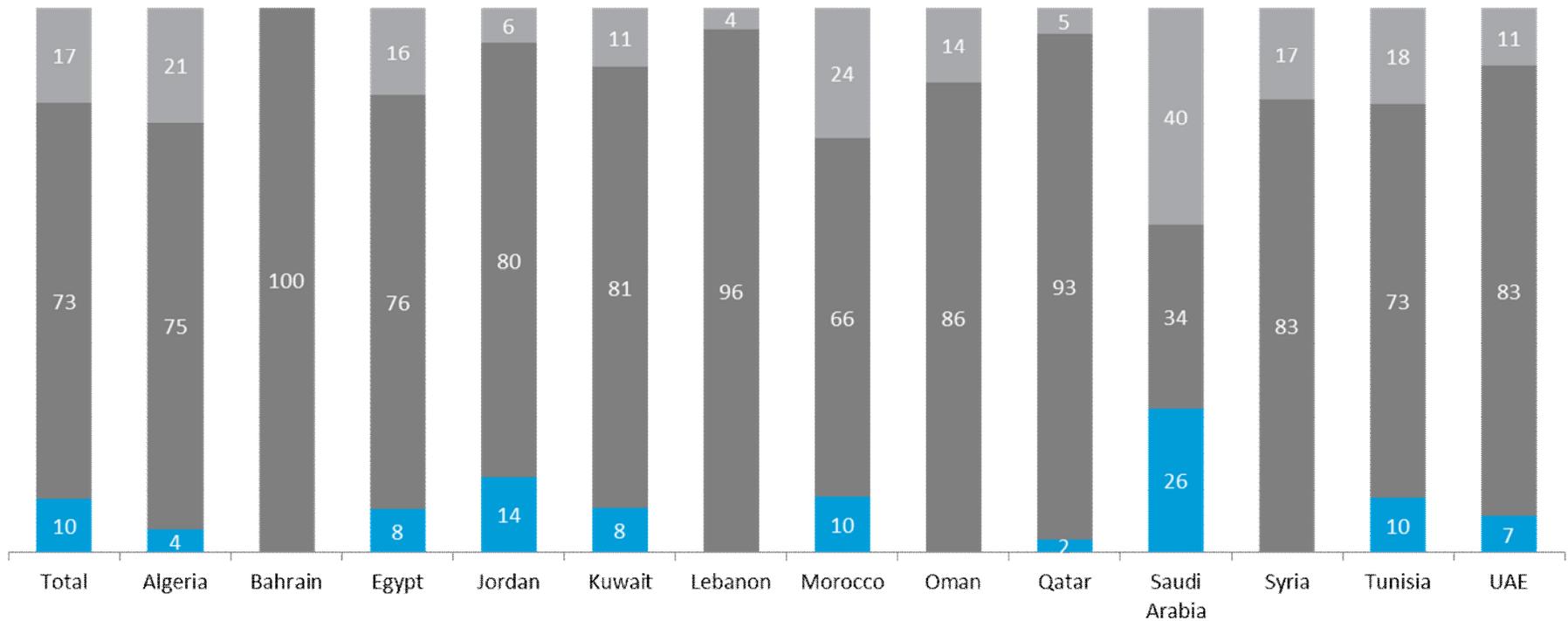
Fig in %

Base: All respondents (n=888)

# Workplace gender segregation

The large majority of respondents (73%) reported having a mix of men and women working together in the same workplace. Significantly more respondents in KSA stated that they work in female only workplaces (26%) or in a workplace with the genders segregated (40%)

- We have a mix of men and women at the work place but in separate sections
- We have a mix of men and women working in the same workplace
- We only have women employees in my workplace



Base: 888 (Total), 115 (Algeria), 9\*\* (Bahrain), 139 (Egypt), 79 (Jordan), 37 (Kuwait), 52 (Lebanon), 59 (Morocco), 22\*\* (Oman), 43 (Qatar), 136 (Saudi Arabia), 6\*\* (Syria), 40 (Tunisia), 151 (UAE)

Q. Which of the following best describes your workplace

Fig in %

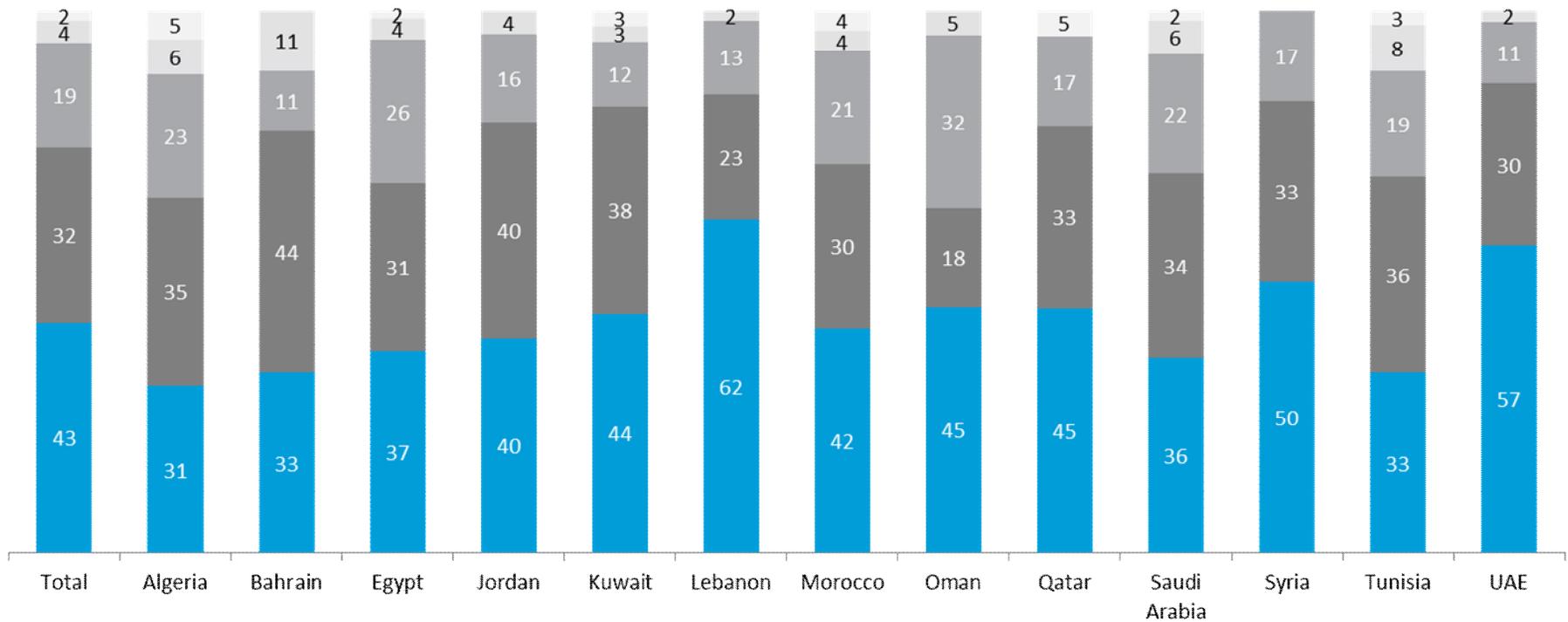
Base: All respondents

\*\* Low base, Interpret with caution

# Comfort level working in a mixed gender environment

Overall, majority (75%) of women who work in a mixed gender environment are comfortable with this, with two – fifths of all respondents (43%) reporting that they are extremely comfortable in a mixed – gender environment. Only a small number of respondents (6%) are uncomfortable with mixed – gender environments.

- Extremely comfortable
- Comfortable to some extent
- Neither comfortable nor uncomfortable
- Uncomfortable to some extent
- Not at all comfortable



Base: 802, 110, 9\*\*, 129, 68, 34, 52, 53, 22\*\*, 42, 100, 6\*\*, 36, 141

Q. How comfortable are you working in a mixed gender environment?

\*\* Low base, Interpret with caution

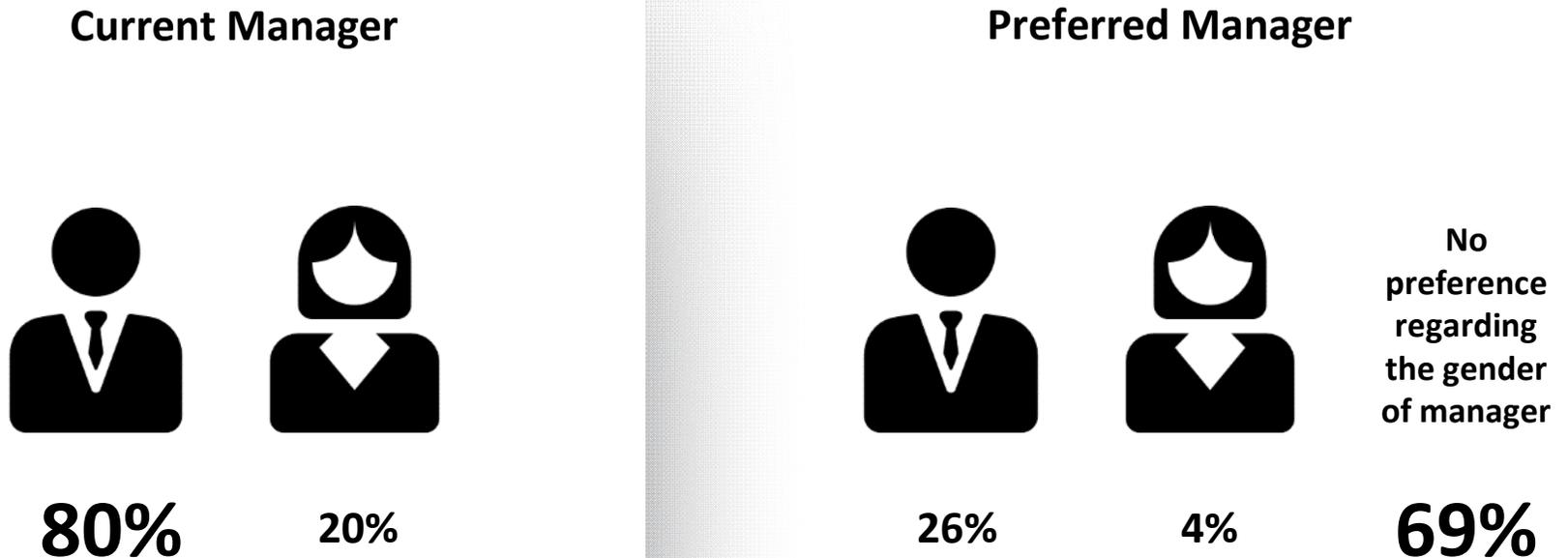
Fig in %

Base: All respondents who said they have mix of men and women working in their workplace as well as those working in same workplace but in separate sections



# Current work place gender scenario

80% of respondents working in a mixed – gender environment report having a male manager at their current organization. Two – thirds (69%) of respondents have no gender – based preference for a manager.



Q. Your current manager is?

Q. Would you prefer your manager to be?

Fig in %

Base: All respondents who said they have mix of men and women working in their workplace as well as those working in same workplace but in separate sections - 802

## Treatment of men vs. women at workplace

Overall, the majority of respondents believed women and men are treated equally in the workplace across a variety of areas, including working hours, training and development, advice and support, recruitment and selection and benefits. However, 1 in every 4 respondents believe women are treated less favorably in terms of career progression and salary that they receive.



Q. Based on your experience, do you feel men and women in your workplace are treated equally in the following areas?

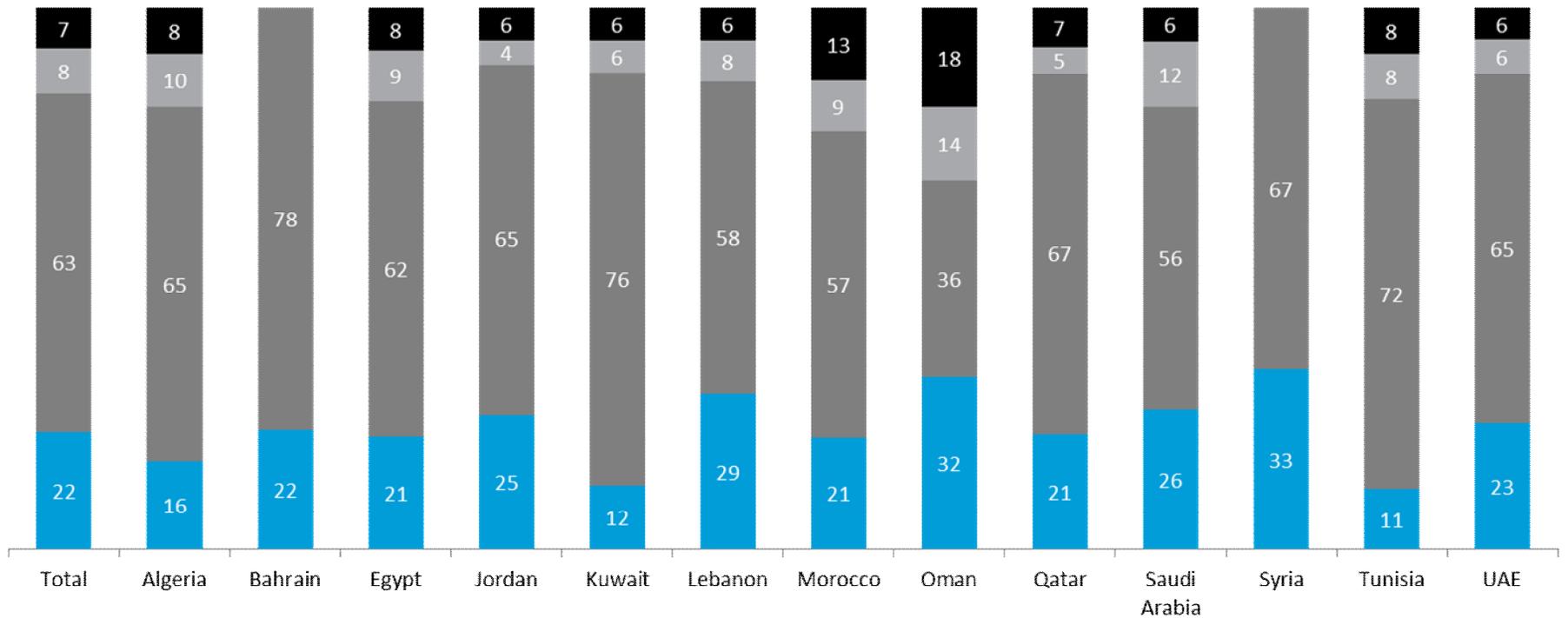
Fig in %

Base: All respondents who said they have mix of men and women working in their workplace as well as those working in same workplace but in separate sections - 802

# Comparison of work hours

In line with the overall feeling of workplace equality, the majority of the respondents (63%) reported working the same number of hours as male colleagues, while one in five (22%) reported working more hours than male colleagues.

- I work more hours than my male colleagues
- I work almost an equal number of hours as my male colleagues
- I work less hours than my male colleagues
- Don't know / Cant say



Base: 802 (Total), 110 (Algeria), 9\*\* (Bahrain), 129 (Egypt), 68 (Jordan), 34 (Kuwait), 52 (Lebanon), 53 (Morocco), 22\*\* (Oman), 42 (Qatar), 100 (Saudi Arabia), 6\*\* (Syria), 36 (Tunisia), 141 (UAE)

Q. When it comes to working hours, which of the following statements best applies to you:

\*\* Low base, Interpret with caution

Fig in %

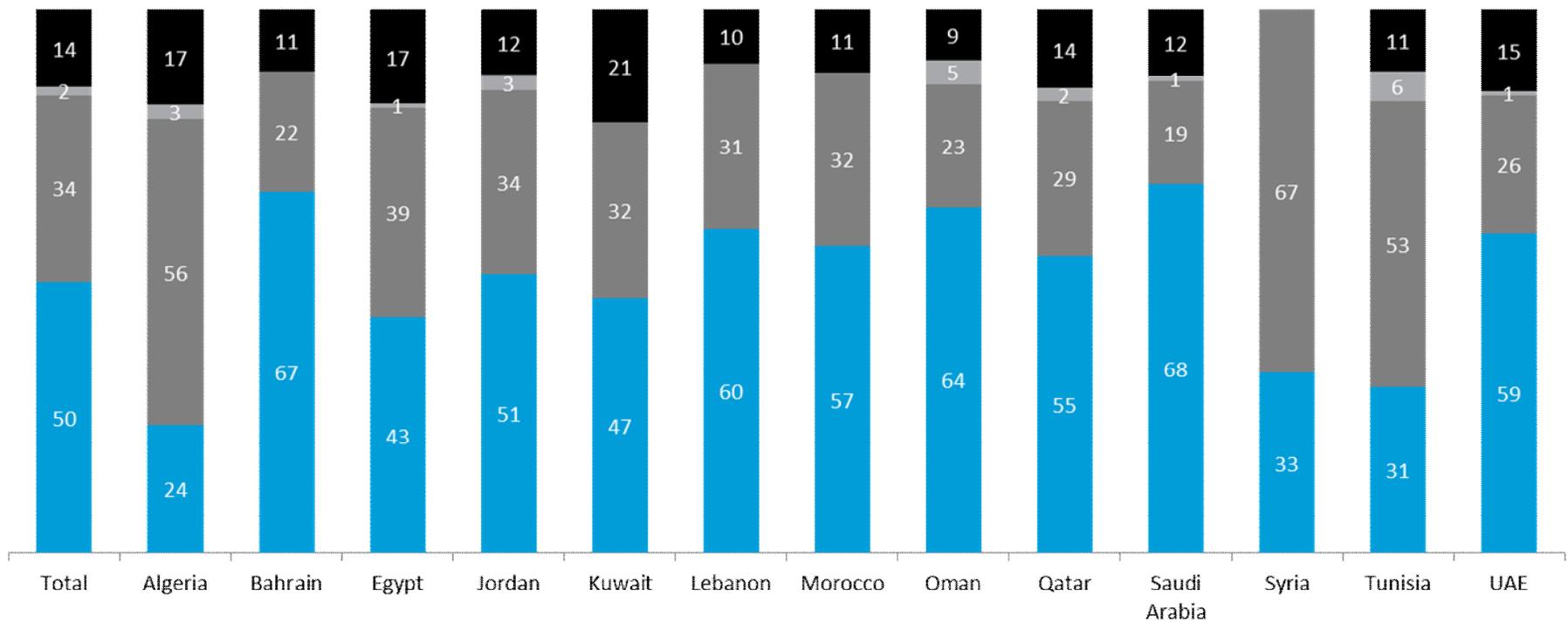
Base: All respondents who said they have mix of men and women working in their workplace as well as those working in same workplace but in separate sections



# Comparison of salary to male colleagues in similar position

Despite an overall feeling of equality across many aspects, it is interesting to note that a considerable proportion of women surveyed still feel they receive less pay than male counterparts - 50% (Highest in KSA - 68%), compared to 34% who feel they receive the same. Only 2% of respondents feel they receive more pay than male counterparts.

- I feel I receive less pay than my male counterparts
- I feel I receive the same pay as my male counterparts
- I feel I receive more pay than my male counterparts
- Don't know / Cant say



Base: 802 (Total), 110 (Algeria), 9\*\* (Bahrain), 129 (Egypt), 68 (Jordan), 34 (Kuwait), 52 (Lebanon), 53 (Morocco), 22\*\* (Oman), 42 (Qatar), 100 (Saudi Arabia), 6\*\* (Syria), 36 (Tunisia), 141 (UAE)

Q. How do you feel your salary compares to those of your male colleagues in a similar position?

\*\* Low base, Interpret with caution

Fig in %

Base: All respondents who said they have mix of men and women working in their workplace as well as those working in same workplace but in separate sections

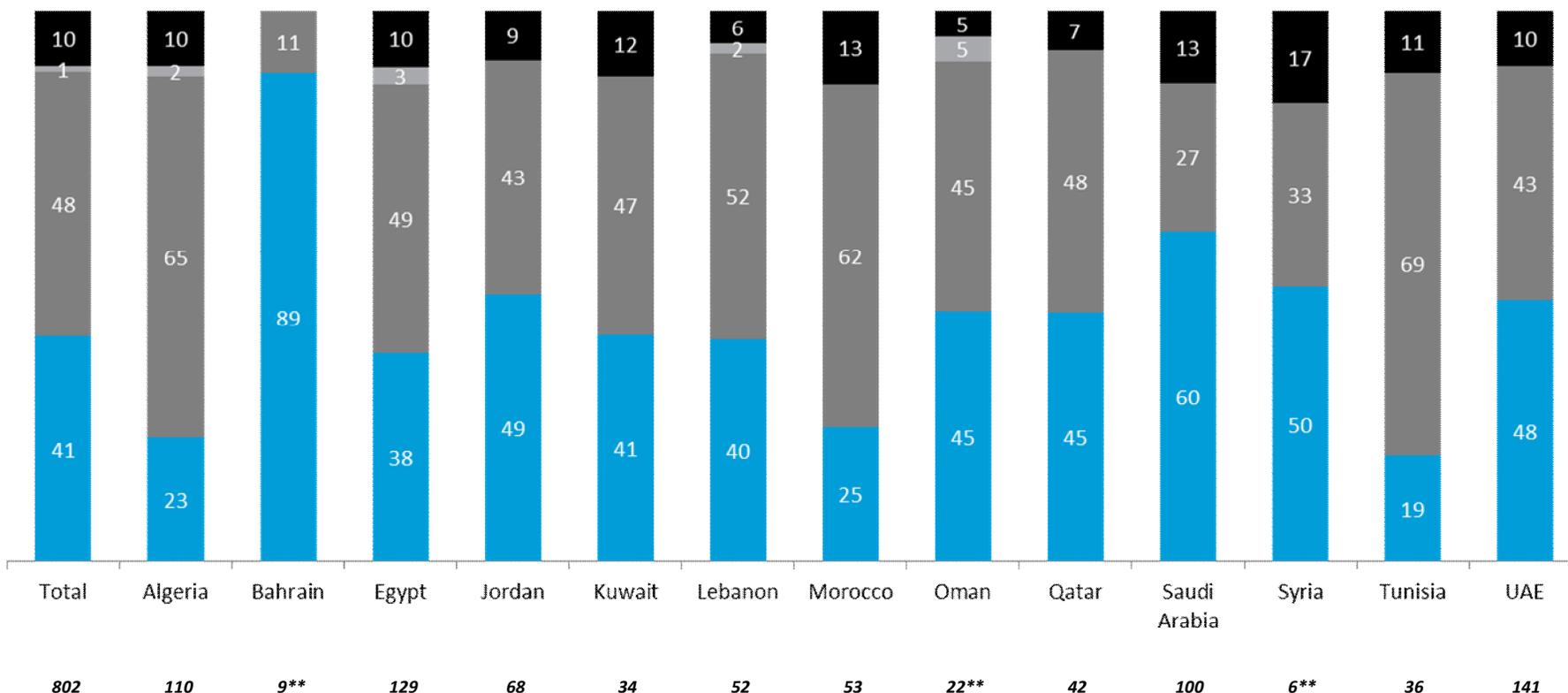


# Comparison of promotions and career growth

While 41% of respondents believe women have lower chance of being promoted, half of women surveyed (48%) believe promotions depend entirely on job performance and gender plays no role.

Women in Tunisia, Algeria and Morocco were more likely to feel that gender plays no role in promotion decisions.

- Don't know / Cant say
- Males have a lower chance of being promoted than their female counterparts
- Chances of receiving a promotion depend entirely on performance on the job and gender plays no role
- Females have a lower chance of being promoted than their male counterparts



Q. When it comes to promotions and career growth, which of the following statements best applies to your organization?  
Fig in %

\*\* Low base, Interpret with caution

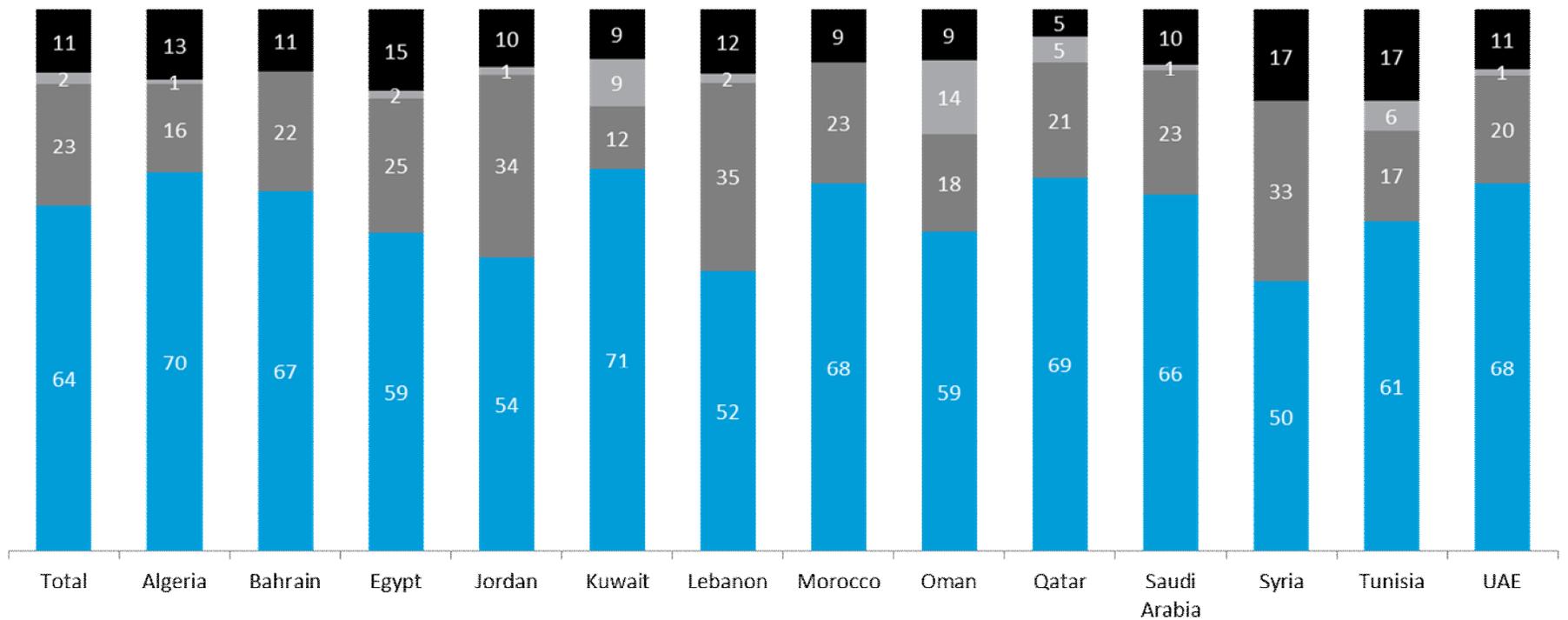
Base: All respondents who said they have mix of men and women working in their workplace as well as those working in same workplace but in separate sections



# Special benefits for women employees!

The majority of respondents (64%) claim their employer provides no special benefits for women employees. However, respondents in Lebanon (35%) and Jordan (34%) are the most to say women employees receive some special benefits. Interestingly, women in Oman (14%) and Kuwait (9%) are more likely to claim that they receive many special benefits.

- There are no special benefits for women employees
- There are some special benefits for women employees
- There are many special benefits for women employees
- Don't know / Cant say



Base: 802 (Total), 110 (Algeria), 9\*\* (Bahrain), 129 (Egypt), 68 (Jordan), 34 (Kuwait), 52 (Lebanon), 53 (Morocco), 22\*\* (Oman), 42 (Qatar), 100 (Saudi Arabia), 6\*\* (Syria), 36 (Tunisia), 141 (UAE)

Q. Does your current employer provide any special benefits for women employees?

\*\* Low base, Interpret with caution

Fig in %

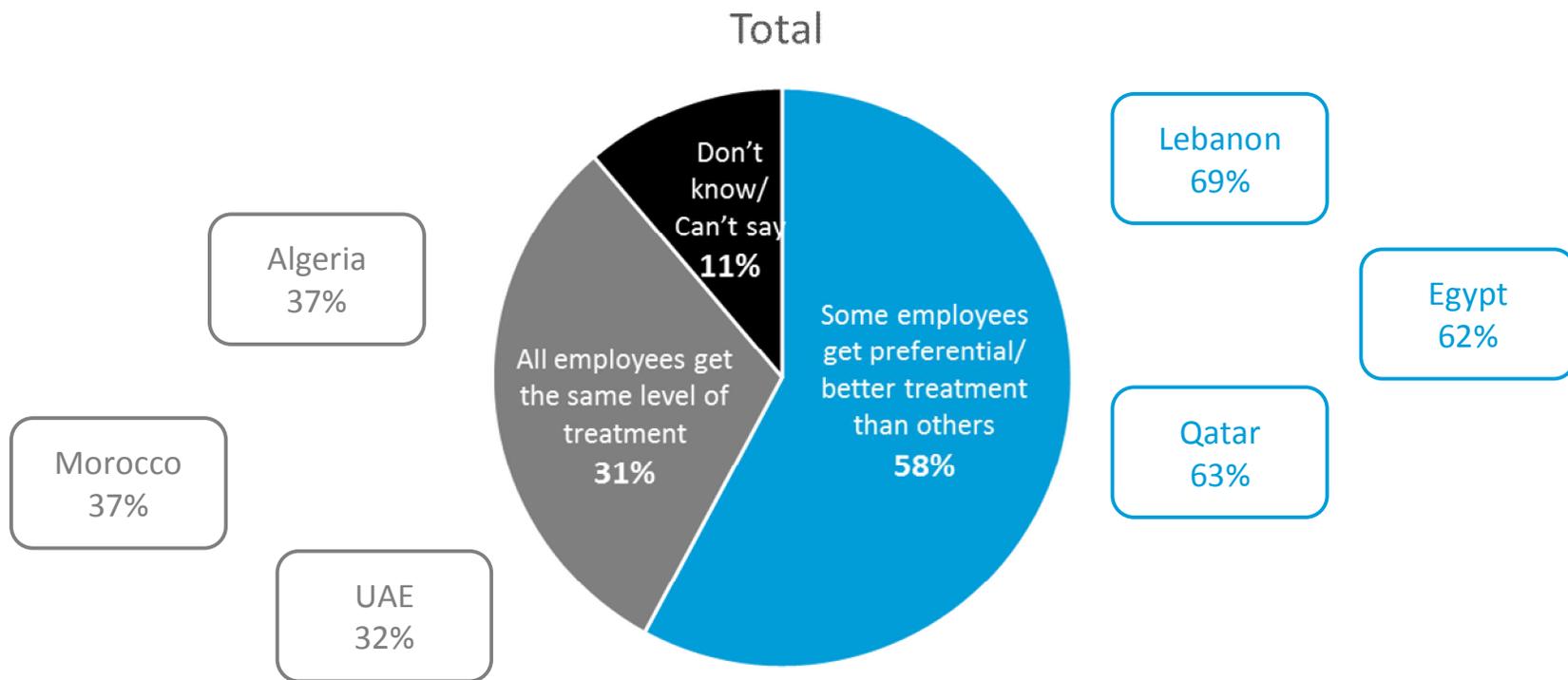
Base: All respondents who said they have mix of men and women working in their workplace as well as those working in same workplace but in separate sections

## Preferential treatment in the workplace

While the majority of respondents (58%) reported that some employees get better / preferential treatment than others, it appears that the preferential treatment is not always gender – related, with half (48%) of those working in a mixed gender environment stating both males and females are treated equally.

Of those who claim some employees get better treatment than others, a larger proportion seem to think men are given a preferential treatment (33% vs. 6% feeling women get a preferential treatment).

Similarly, appreciation is also not seen as being linked to gender, with the majority (59%) of respondents reporting that appreciation at the workplace is based on performance alone. (Refer to next slide)

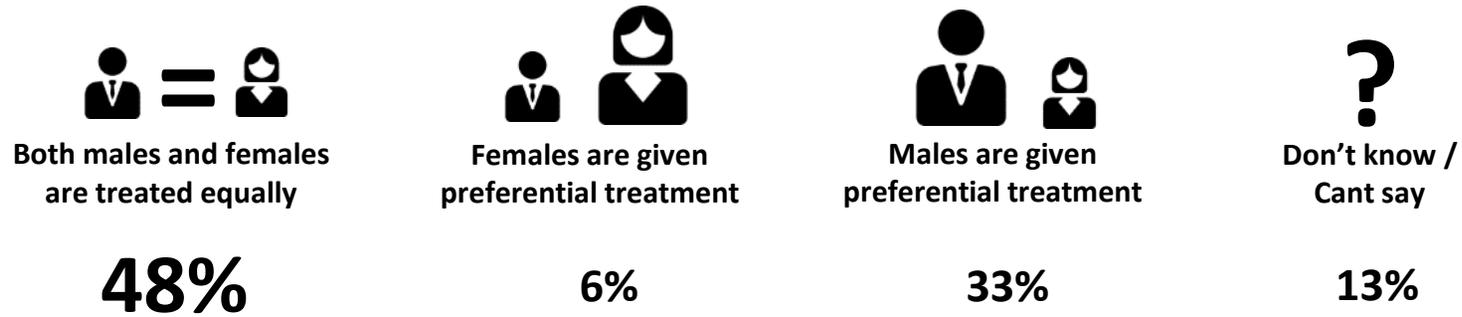


In terms of treatment at your workplace, which of the following best describes your views:

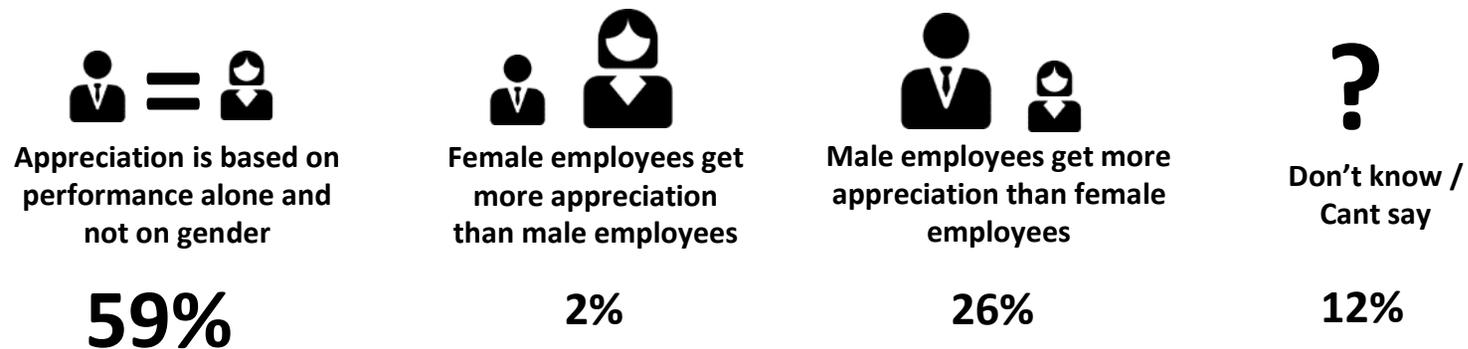
Fig in %

Base: All respondents - 888

## Perception of equality among male and female employee in the organization



## System of appreciation, recognition or rewards in the organization



Q. Which of the following statements describe your perception of equality among male and female employees in your organization?

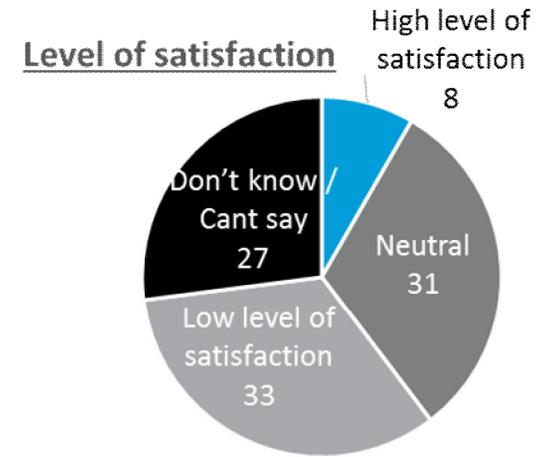
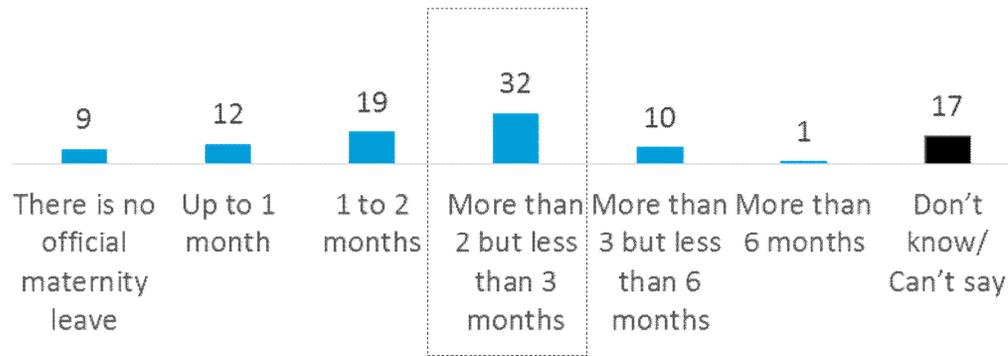
Q. In your opinion, which of the following best describes the system of appreciation, recognition or rewards in your organization?

Fig in %

Base: All respondents who said they have mix of men and women working in their workplace as well as those working in same workplace but in separate sections - 802

# Maternity leave in the organization

Most women reported their organization gives between 2 to 3 months official maternity leave. However, when asked about their satisfaction level, only 8% were highly satisfied. On the other hand, 60% reported their company does not offer paternity leave to males.



# Paternity leave in the organization



Q. How many months of official maternity leave are women granted in your organization?

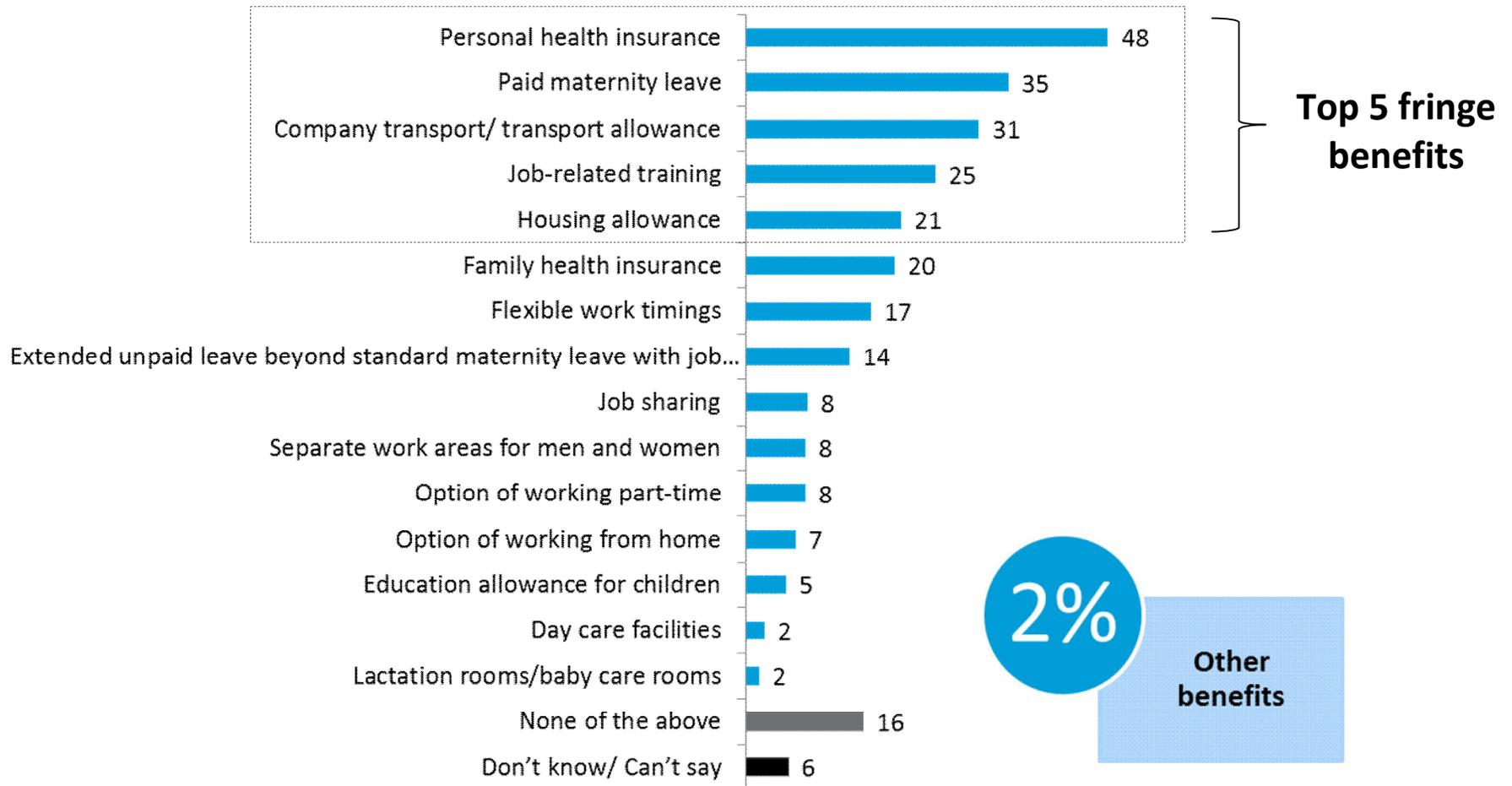
Q. How would you rate your satisfaction with the maternity leave and benefits available in your current job?

Q. How many months of official paternity leave are men granted in your organization?

Fig in %

## Various fringe benefits provided by the company

Respondents report receiving a variety of company benefits: Personal health insurance (48%), Paid maternity leave (35%), Company transport / transport allowance (31%), Job – related training (25%) and Housing allowance (21%) being the most prevalent.



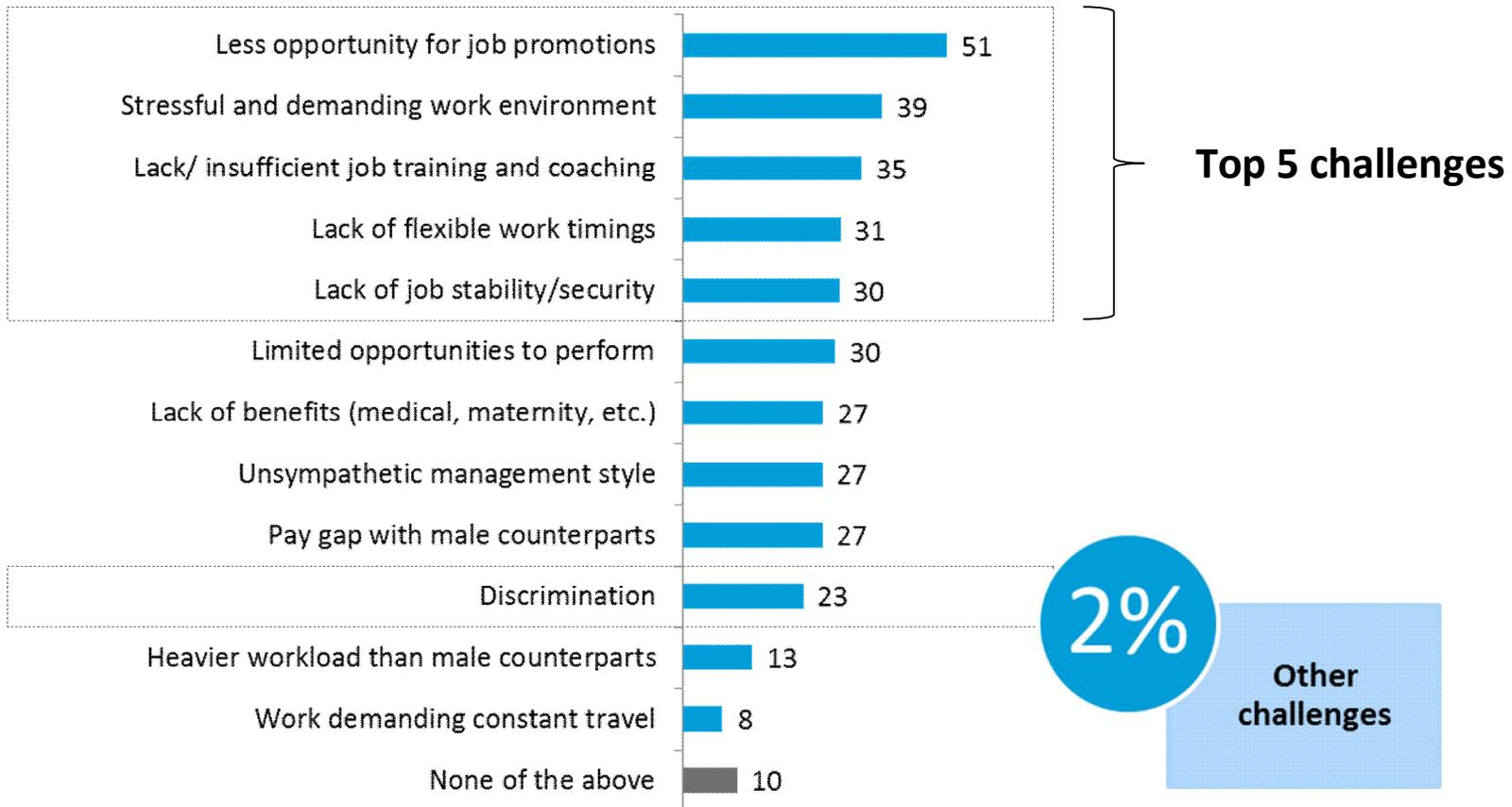
Q. Which of the following does your company provide you with? (Select all that apply)

Fig in %

Base: All respondents (n=888)

## Various challenges women face in their work environment

Less opportunity for job promotions (51%), stressful and demanding work environment (39%), Lack / insufficient job training and coaching (35%), Lack of flexible work timings (31%) and Lack of job stability / security (30%) are reported to be the top 5 challenges women face in their work environment. Having said that, 23% of the respondents also reported discrimination to be one of the key challenges that they face.



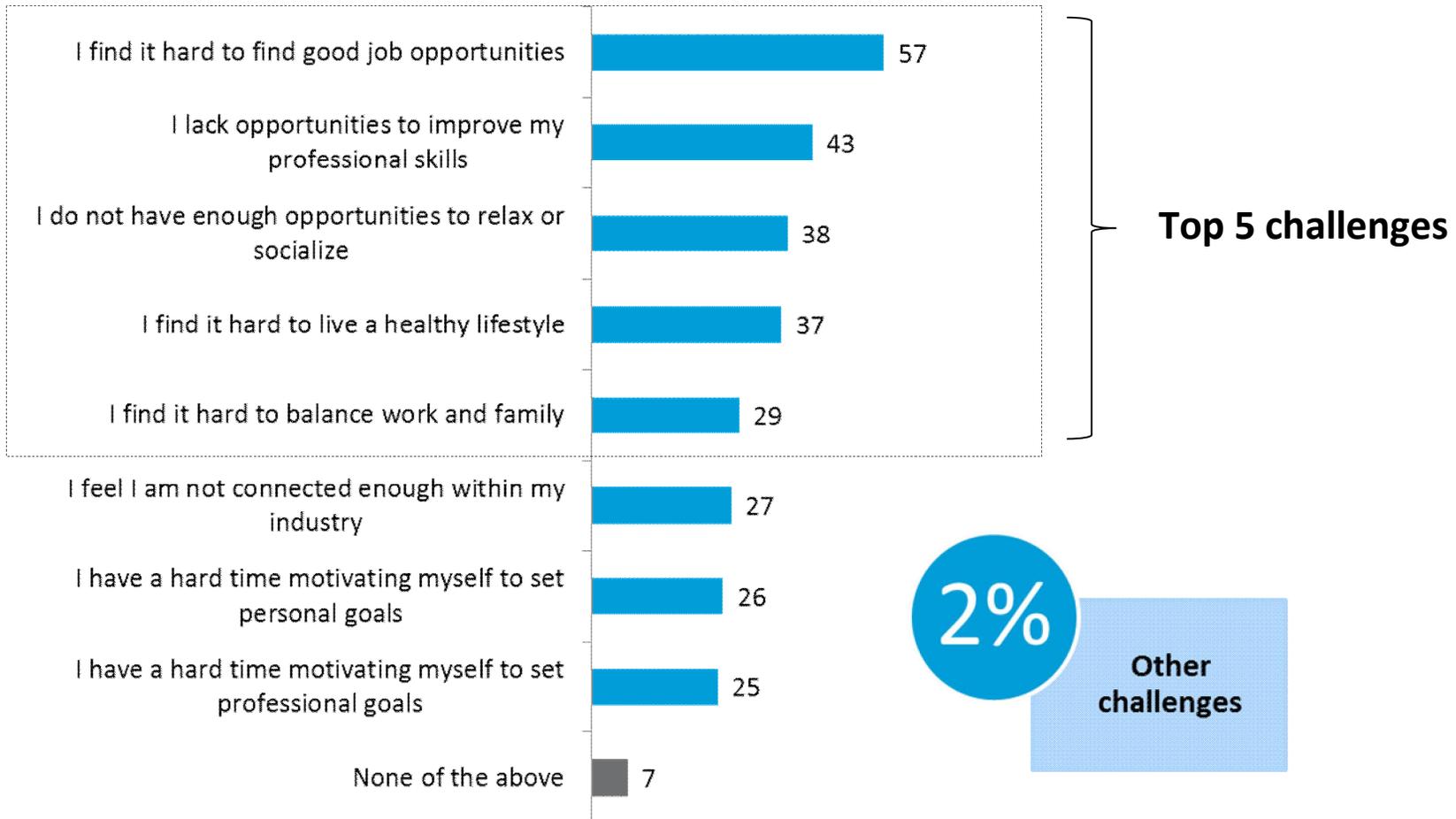
Q. As a woman, what are the challenges you face in your work environment? Please select as many as apply.

Fig in %

Base: All respondents (n=888)

## Key challenges women face in their life

When asked about key challenges in their life, difficulty in finding good job opportunities (57%), lack of opportunities to improve their professional skills (43%), not having enough opportunities to relax or socialize (38%), difficulty to live a healthy lifestyle (37%) and difficulty in having a balance between work and family (29%) emerged as top 5.



Q. And what are the key challenges you face in your life? Please select as many as apply.

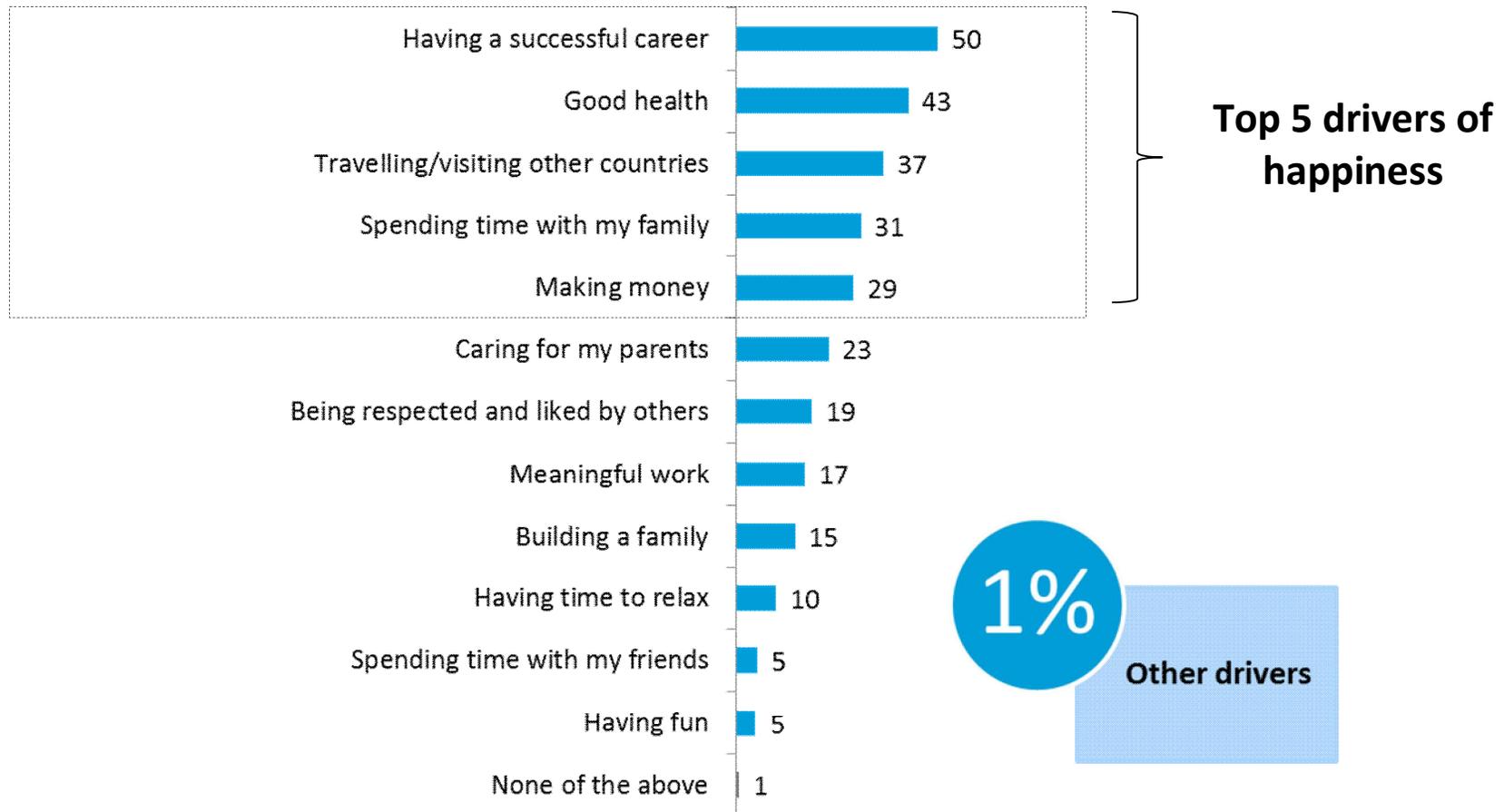
Fig in %

Base: All respondents (n=888)

## Drivers of happiness

Results highlight the importance of career for many working women across the region, with 'having a successful career' emerging as the main source of happiness (50%).

Having said that, maintaining a good health is also critical to them, with 43% selecting 'good health' as the second most important source of happiness, followed by travelling / visiting other countries (37%).



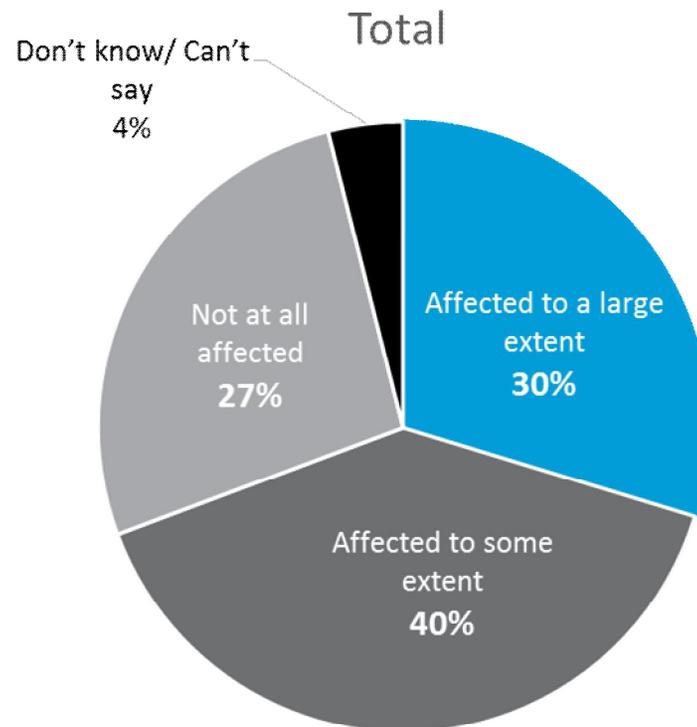
Q. What would make you feel happy in your life? Please select up to three of the following that would bring you the most happiness.

Fig in %

Base: All respondents (n=888)

## Impact of having children on women's career

70% of respondents with children stated that their decision to have children has affected their career, at least to some extent. 27% do not believe that their career was affected at all by having children.



Q. To what extent has your decision to have children affected your career?

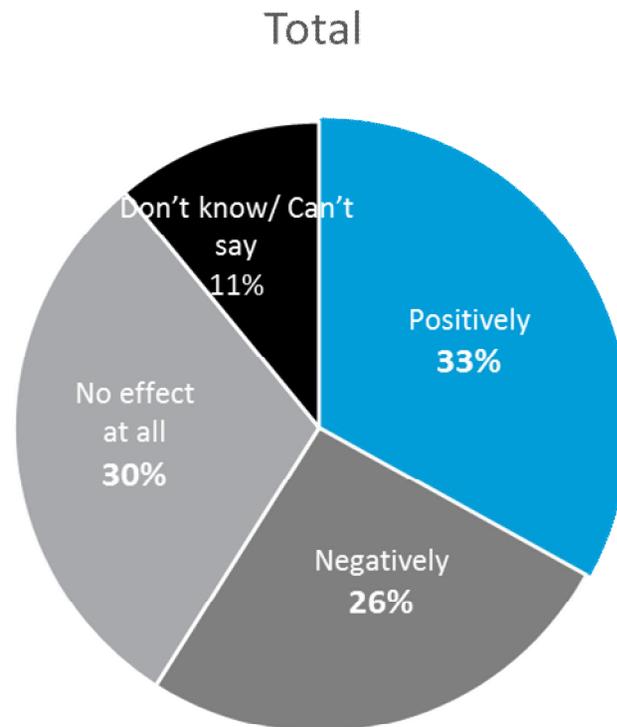
Fig in %

Base: All those with children - 278

## Influence of career choices on marital life

The majority of respondents indicated that their career choices had either a positive effect (33%) or no effect (30%) on their marital life.

On the other hand, one – fourth reported that their marital life has been negatively affected by the career choices



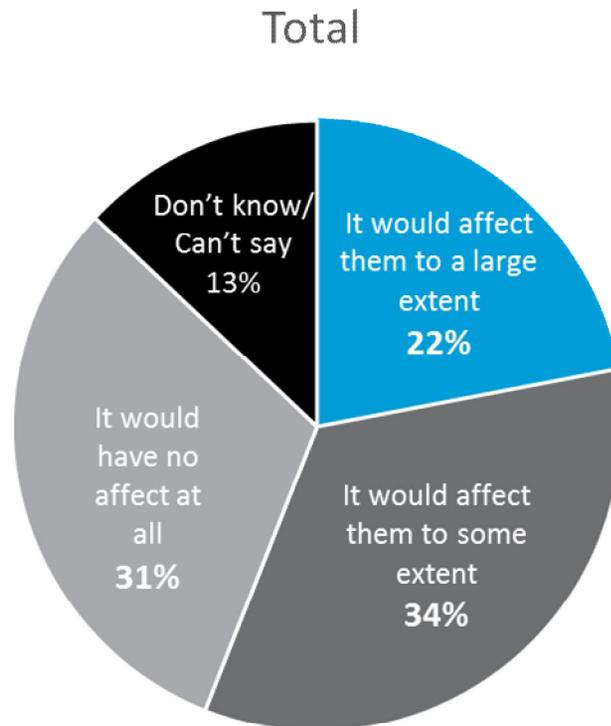
Q. In what way has your marital life been affected by your career choices?

Fig in %

\*\* Low base, Interpret with caution

## Impact of future marriage plans on career

Over half (56%) of those surveyed believe their future marriage plans would affect their career choices, at least to some extent. While, 31% believe these plans will not affect their career choices.



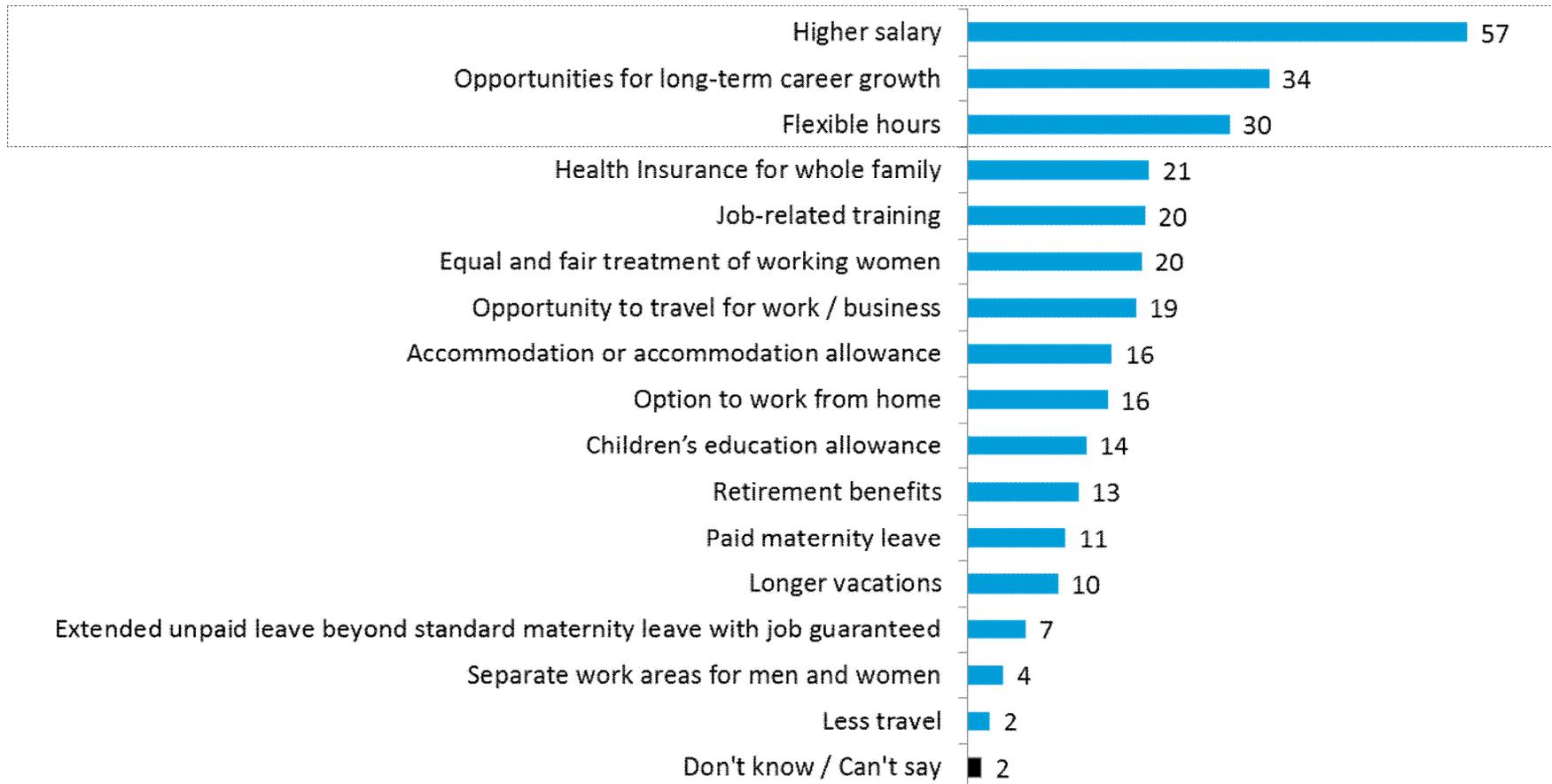
Q. In your opinion to what extent would your future marriage plans affect your career choices?

Fig in %

Base: All those who are either single / never married - 468

## Top 3 benefits most important for working women

Overall, the majority (57%) of respondents selected a higher salary as the most important benefit, one third (34%) stated that opportunities for long term career growth were also very important to them as were the flexible working hours (30%). Less travel and separate work areas for men and women appear to be significantly less important.



Q. As a working woman, which THREE of the following benefits are most important to you? (Please select 3 answers)

Fig in %

Base: All respondents (n=888)

## Top 3 reasons that might influence to switch jobs

When asked what would most influence them to change jobs, a better salary emerged as the main driver (67%). This was followed by better benefits (apart from salary) (34%) and higher designation / position (23%).



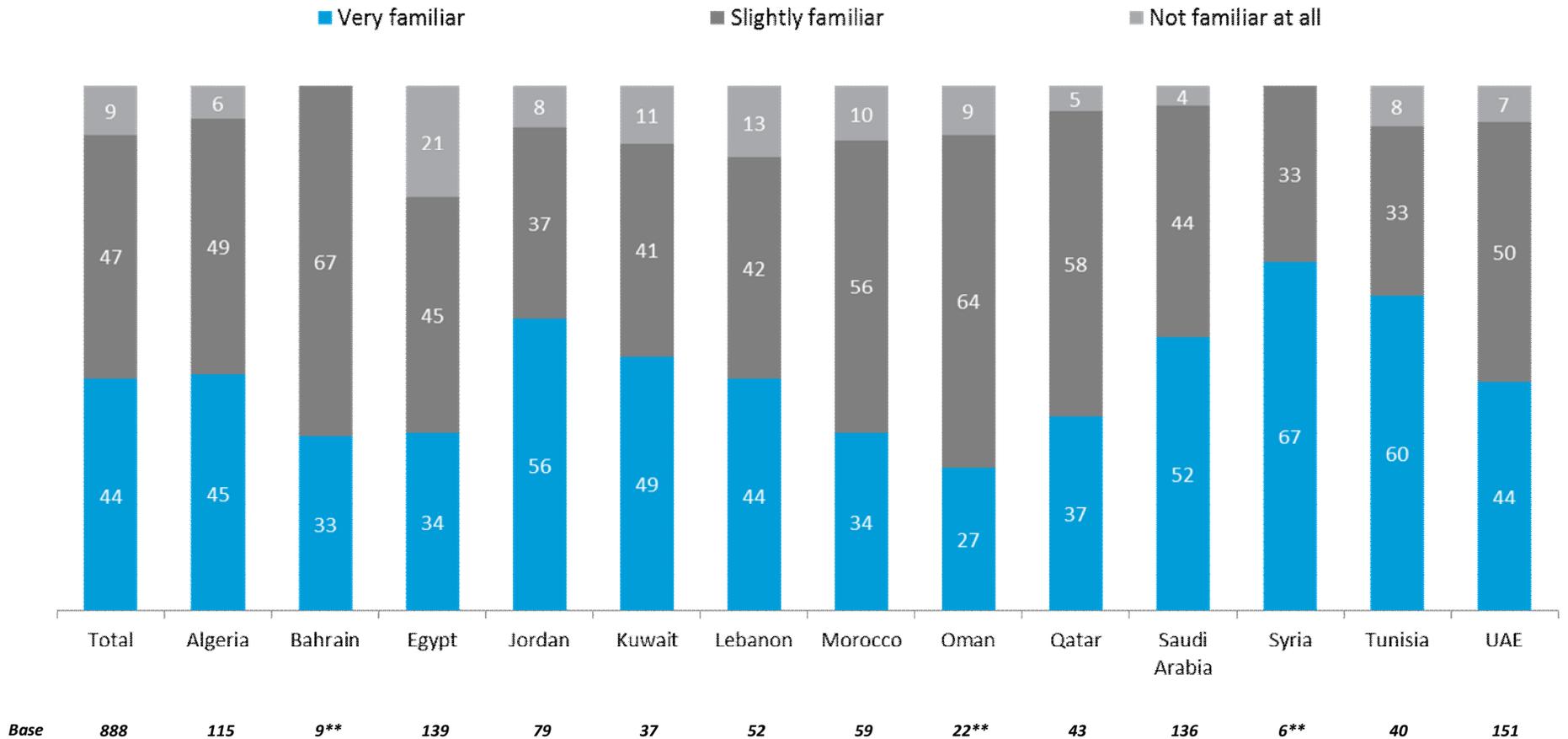
Q. Please indicate the three most important reasons that might influence you to switch jobs? (Please select any three)

Fig in %

Base: All respondents (n=888)

# Familiarity with labor laws of the country

Almost all (91%) respondents stated they have some familiarity with the labor laws of their country of residence, with over two fifths (44%) claiming to be very familiar.



Q. How familiar are you with the labor laws of the country in which you work?

Fig in %

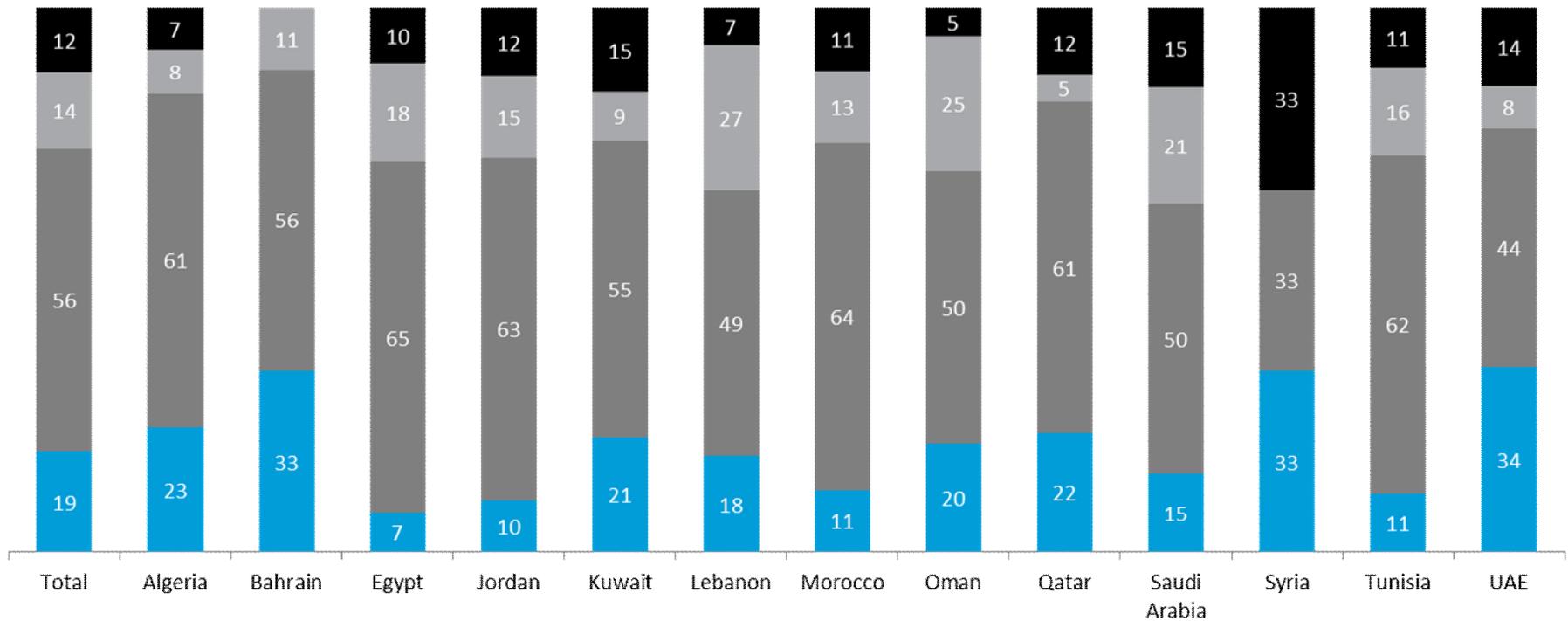
Base: All respondents

\*\* Low base, Interpret with caution

# Extend to which the labor laws are fair to women

Of those who are familiar with the labor laws, about three quarters (75%) stated that they are fair to women, at least to some extent.

■ They are fair to large extent   ■ They are fair to some extent   ■ They are not at all fair   ■ Don't know/ Can't say



Base: 807 (Total), 108 (Algeria), 9\*\* (Bahrain), 110 (Egypt), 73 (Jordan), 33 (Kuwait), 45 (Lebanon), 53 (Morocco), 20\*\* (Oman), 41 (Qatar), 131 (Saudi Arabia), 6\*\* (Syria), 37 (Tunisia), 141 (UAE)

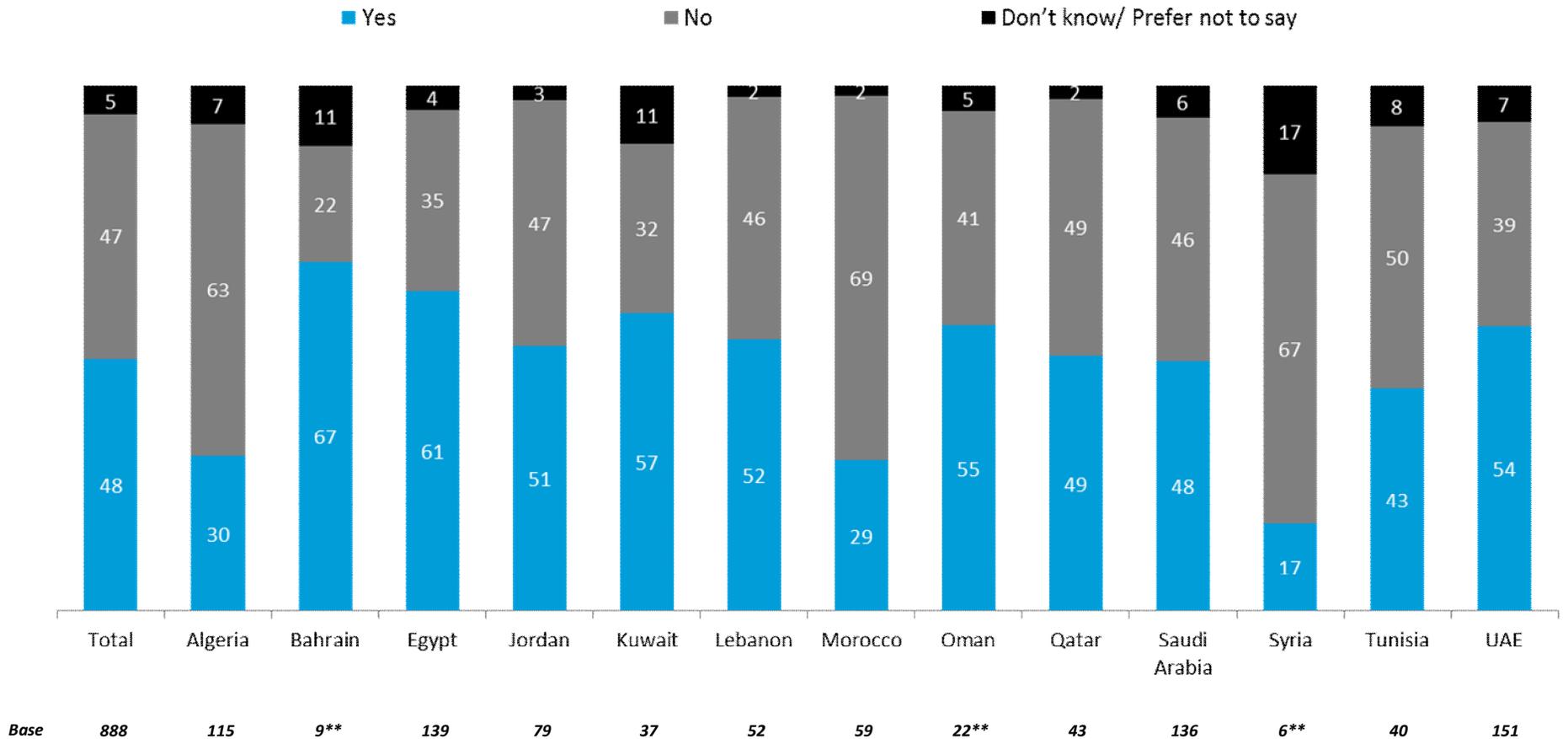
Q. To what extent do you think that these labor laws are fair to women?

Fig in %

\*\* Low base, Interpret with caution

# Job interview discrimination among women

48% of the respondents have been asked questions in a job interview that made them feel discriminated against as women. This notion was highest in Egypt (61%) followed by Kuwait (57%).



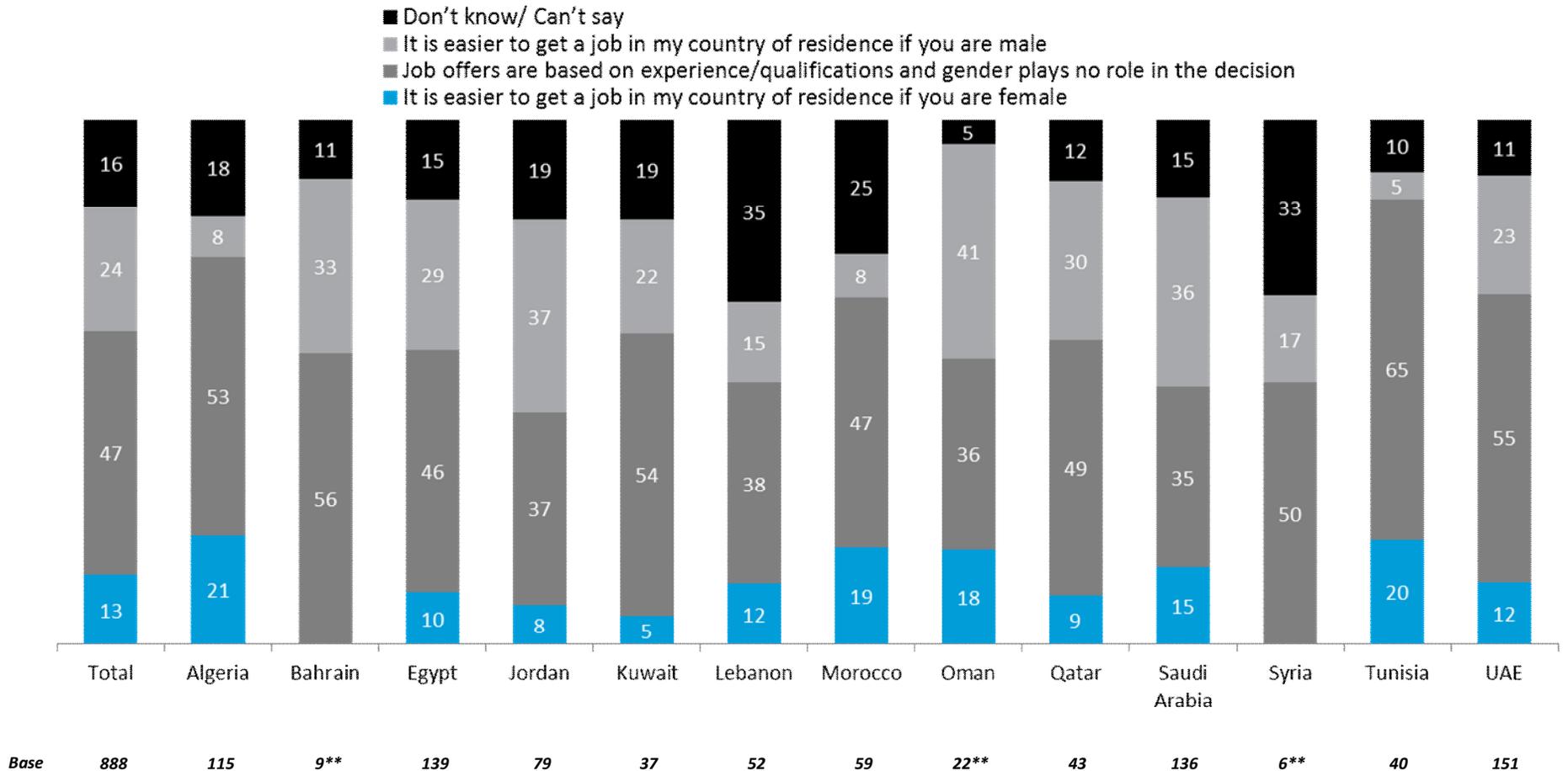
Q. Have you ever been asked questions in a job interview that discriminates you as a woman? (For e.g. Are you planning to get married? Are you planning to have children?)  
Fig in %

Base: All respondents

\*\* Low base, Interpret with caution

# Ease of getting job in country of residence

Majority of the respondents (47%) felt that job offers are based on experience / qualifications and gender plays no role in the decision.



Q. Which of the following statements do you believe is most accurate:

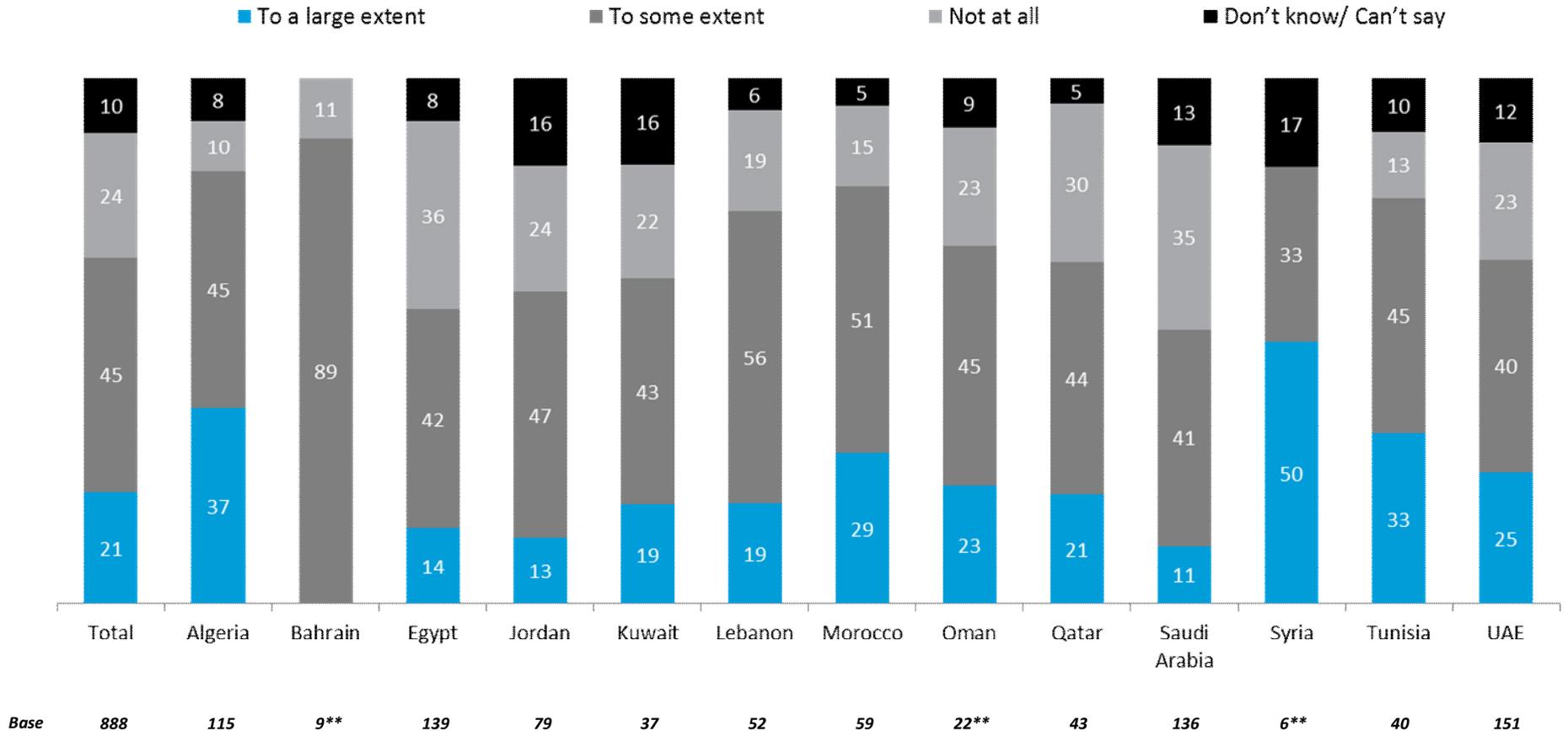
Fig in %

Base: All respondents

\*\* Low base, Interpret with caution

## Extent to which women in their country of residence reached the same level of workplace equality as western countries

66% of the respondents reported that women in their country of residence have reached the same level of workplace equality as compared to working women in western countries, at least to some extent.



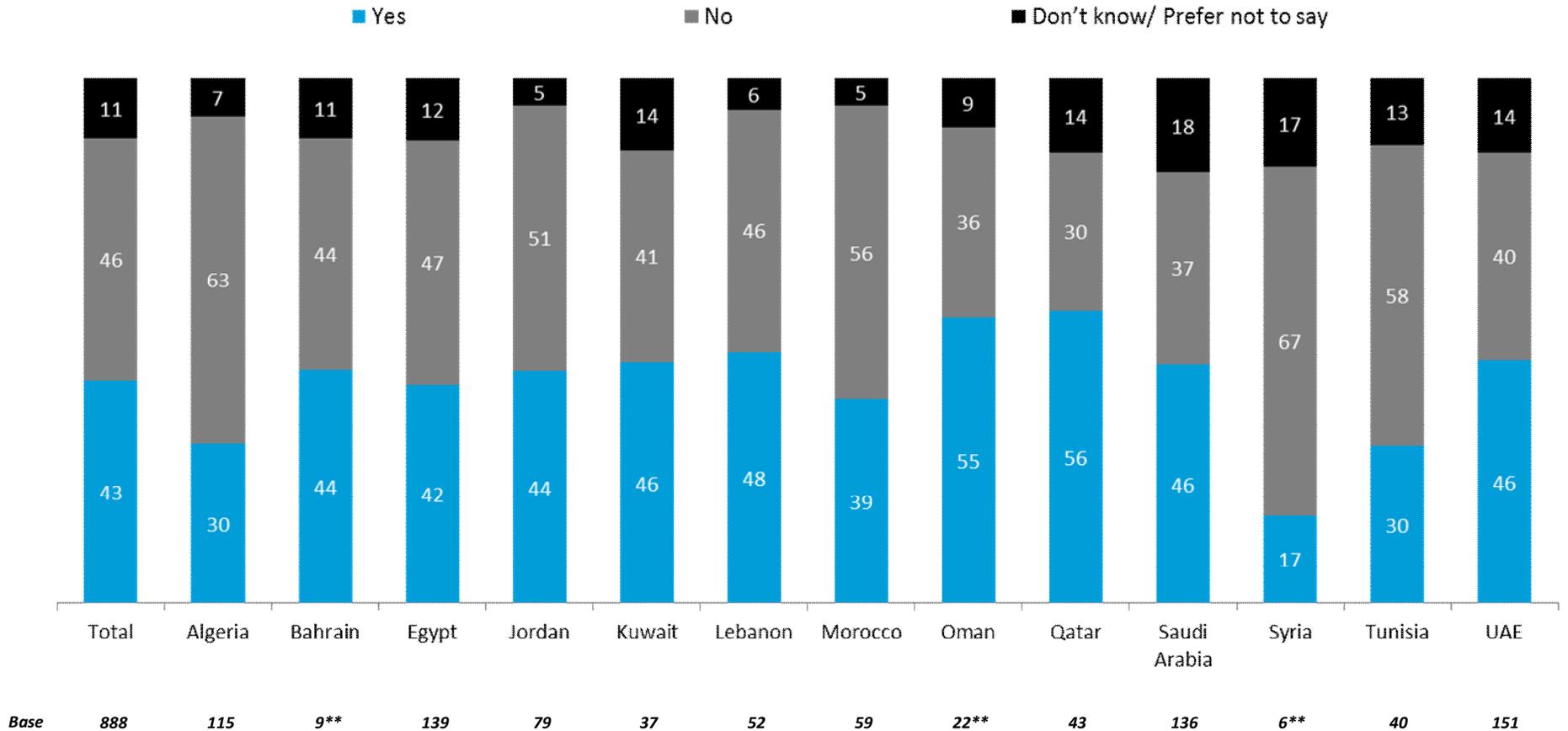
Q. Compared to working women in Western countries, to what extent have women in your country of residence reached the same level of workplace equality?  
Fig in %

Base: All respondents

\*\* Low base, Interpret with caution

# Occasion at workplace where women felt less favorably treated or discriminated against due to their gender

43% women did feel that they were treated less favorably or discriminated against as women on certain occasions at workplace.



Q. Finally, can you think of any occasion at your workplace where you feel you were treated less favorably or discriminated against due to your gender?

Fig in %

Base: All respondents

\*\* Low base, Interpret with caution

Thank You

