

The Middle East Salary Survey

February 2010

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Demographics

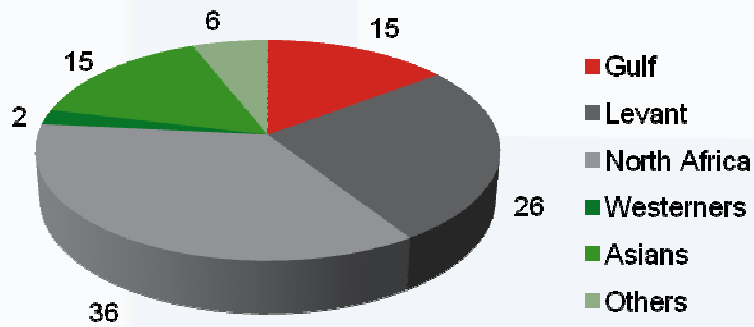
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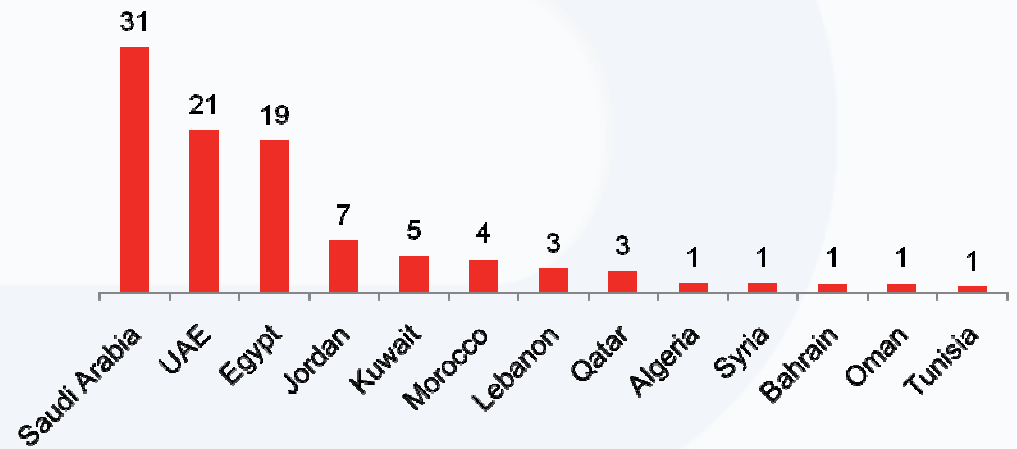
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Respondent Profile 1/2

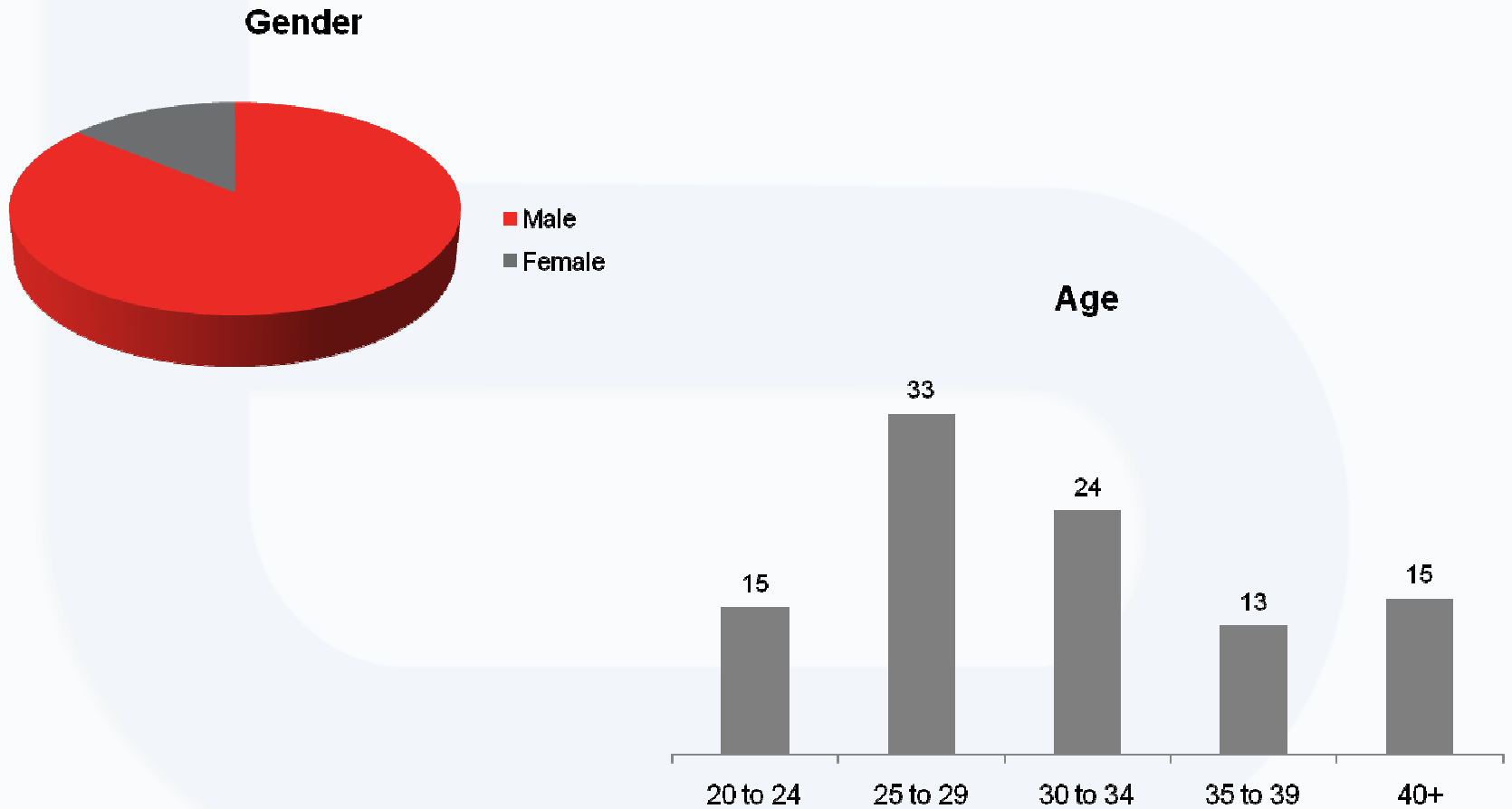
Nationality Group



Country of Residence



Respondent Profile 2/2

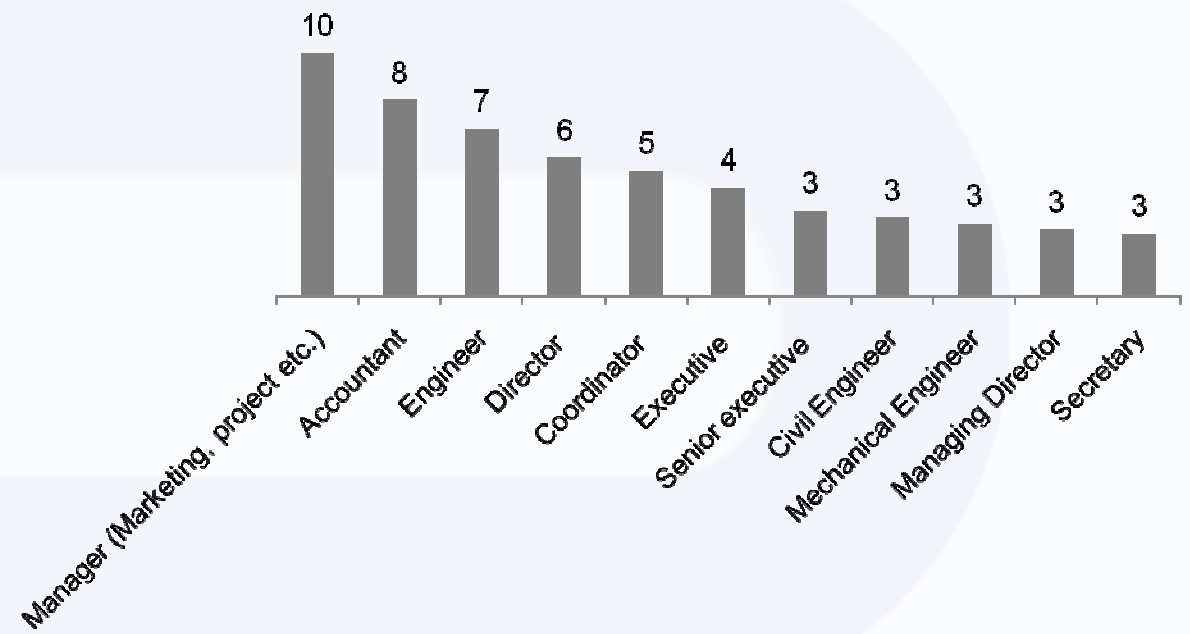


Professional Status

Sector



Position



About the respondents

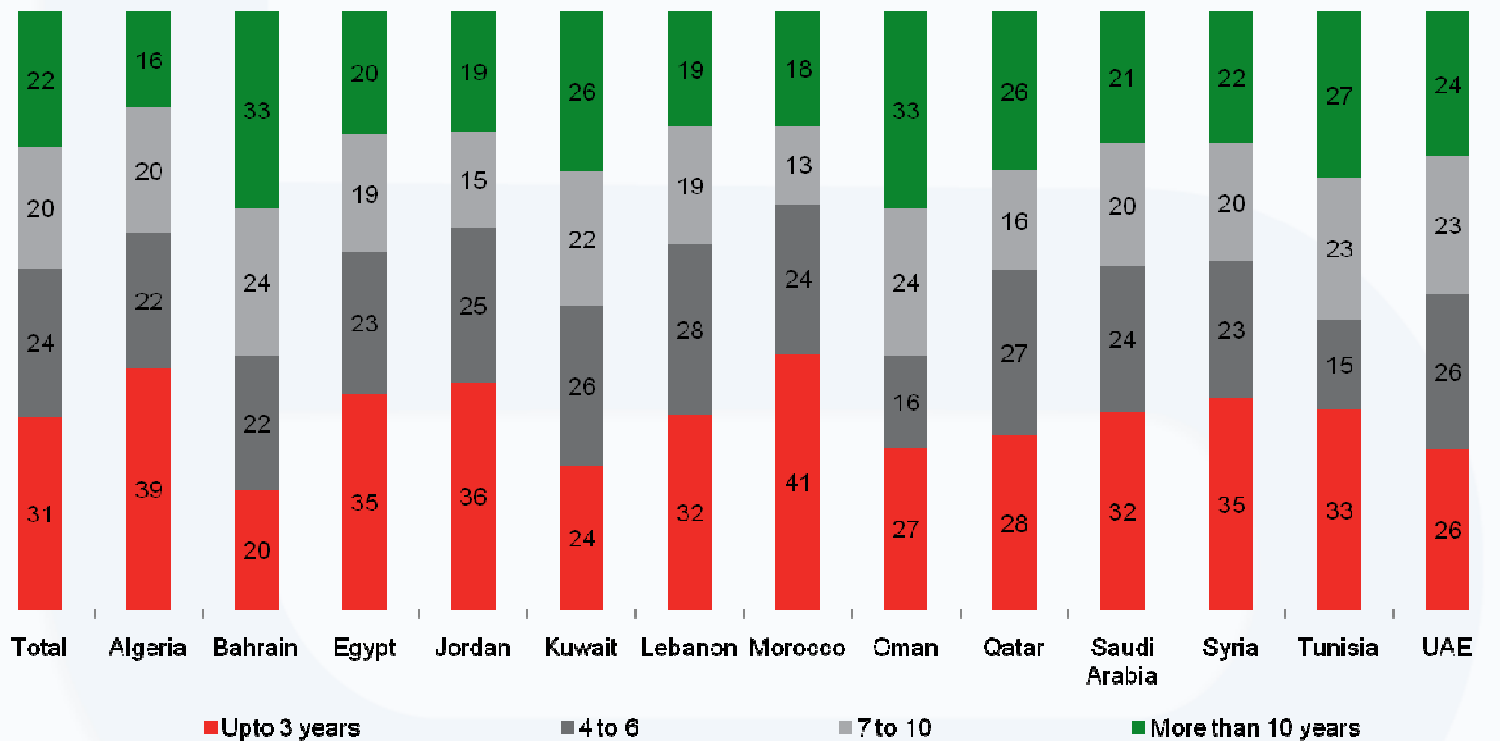
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Number of years of service in the present career path

• Bahrain and Oman seem to have a relatively senior talent pool – is employee retention and loyalty higher in these countries?

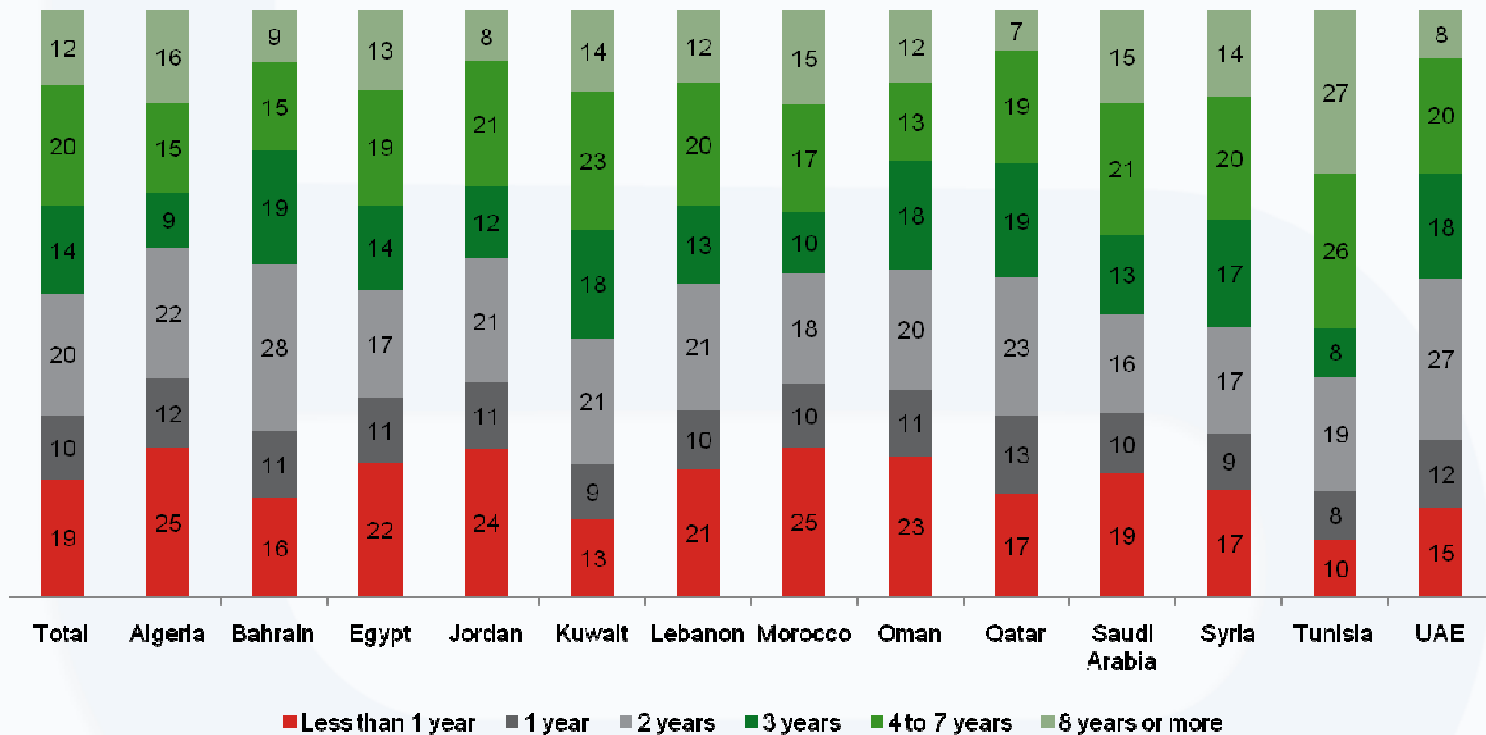


Q: Can you please tell us the total number of years you have been working in your current career path?

Base: Total (10,699), Algeria (129), Bahrain (116), Egypt (2082), Jordan (708), Kuwait (500), Lebanon (313), Morocco (452), Oman (116), Qatar (289), KSA (3391), Syria (123), Tunisia (73), UAE (2225)

Number of years working with the current employer

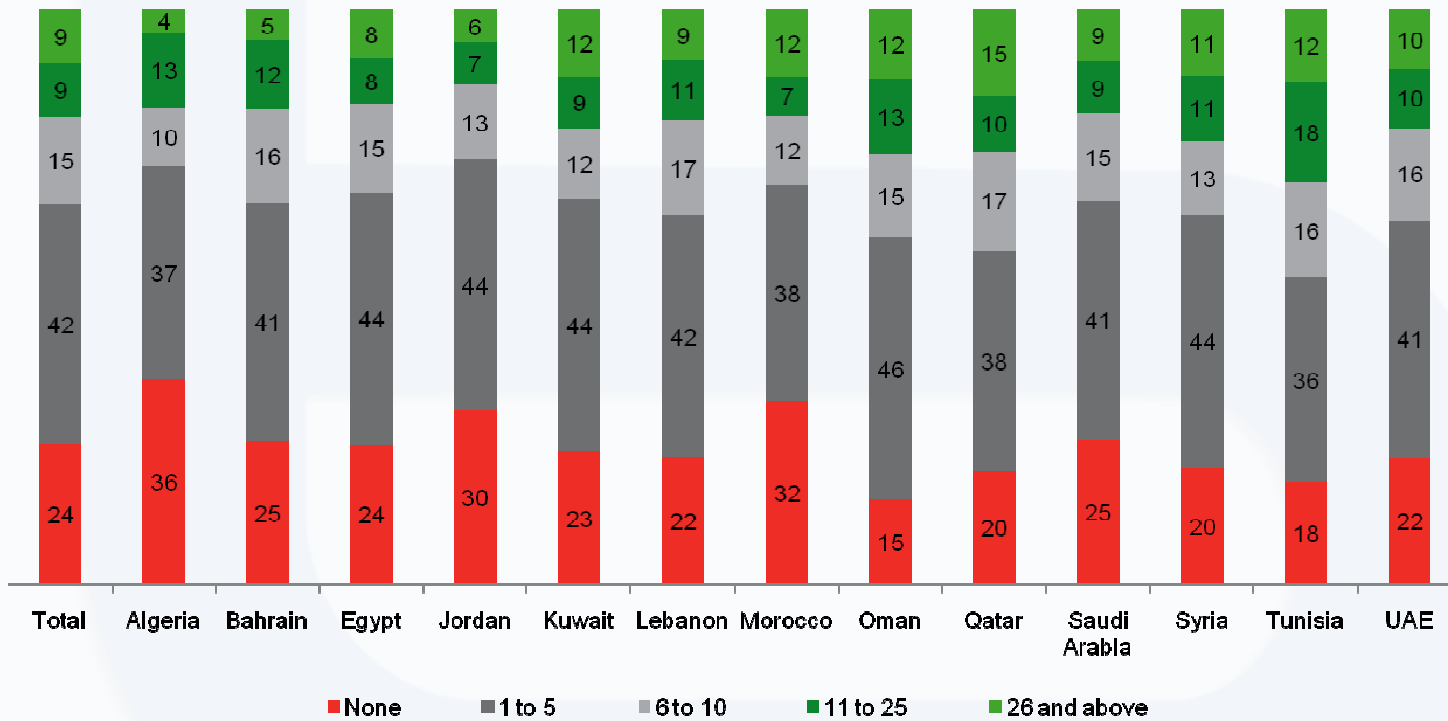
- Higher level of experience in Bahrain and Oman not translating to loyalty
- Tunisia and Saudi Arabia seem to have better retention levels



Q: Can you please tell us the total duration you have been working with your current employer?

Number of People Reporting

- Tunisia, Oman and Qatar respondents have a larger pool of resources to manage

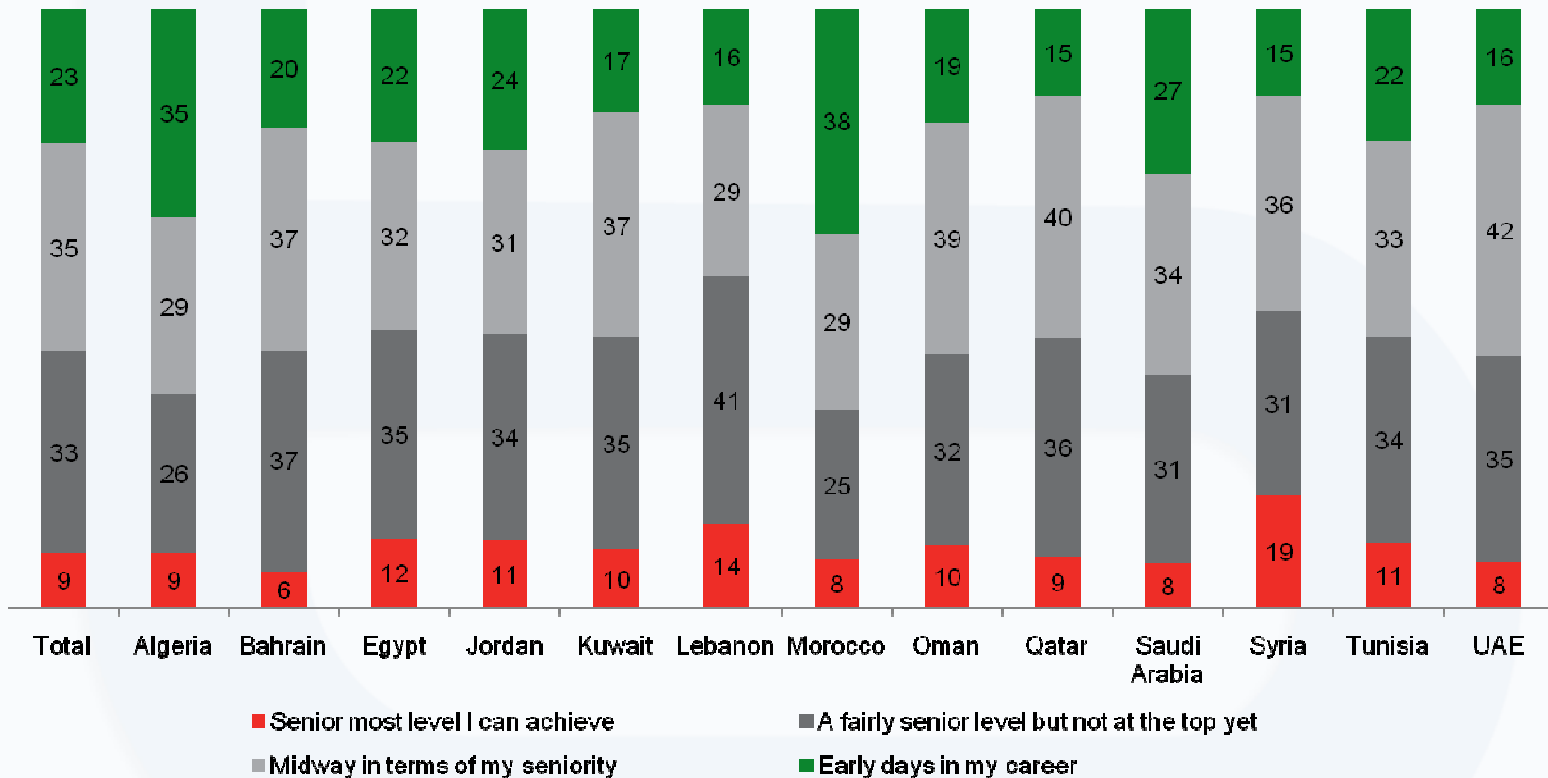


Q: Can you tell us how many people currently report to you both directly and indirectly?

Base: Total (10,699), Algeria (129), Bahrain (116), Egypt (2082), Jordan (708), Kuwait (500), Lebanon (313), Morocco (452), Oman (116), Qatar (289), KSA (3391), Syria (123), Tunisia (73), UAE (2225)

Position in Career Path

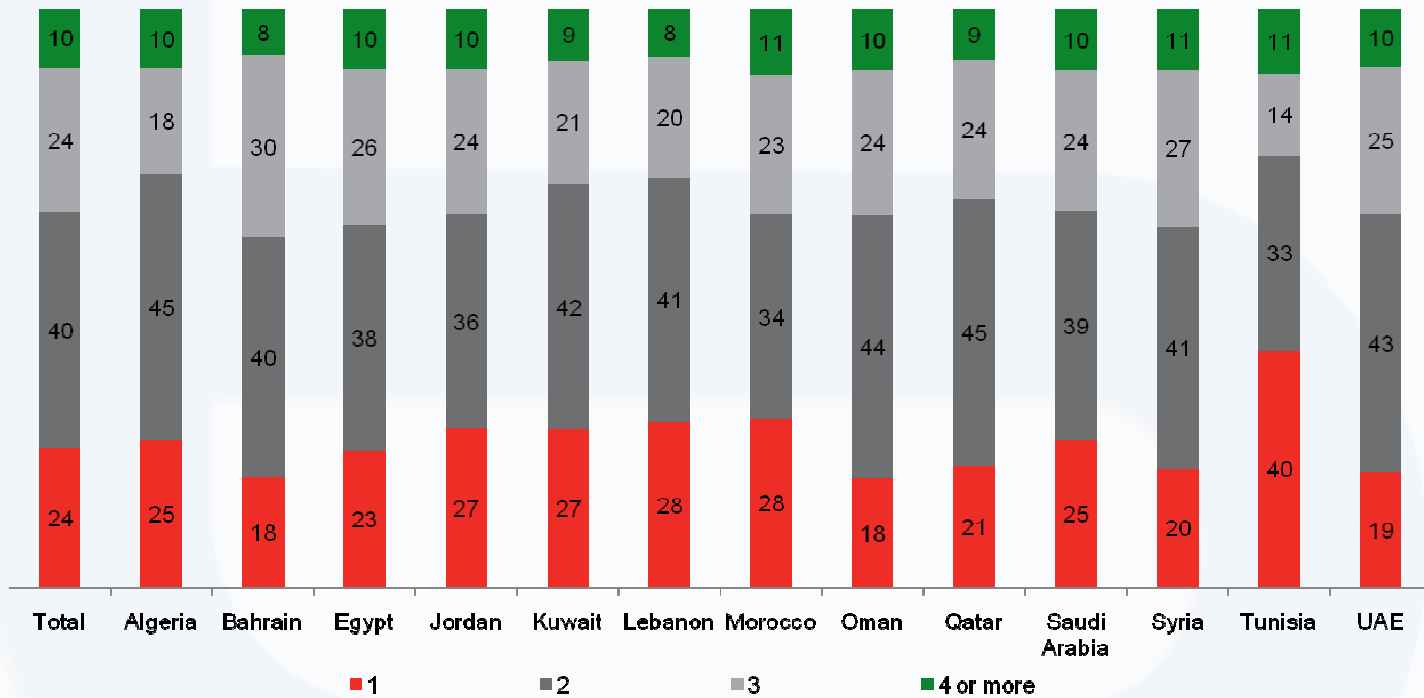
- Lebanon, Syria and Tunisia seem to have a larger base at more senior positions



Q: Can you tell us which of the following best describes the level you have attained so far within your career path?

Number of Jobs Held

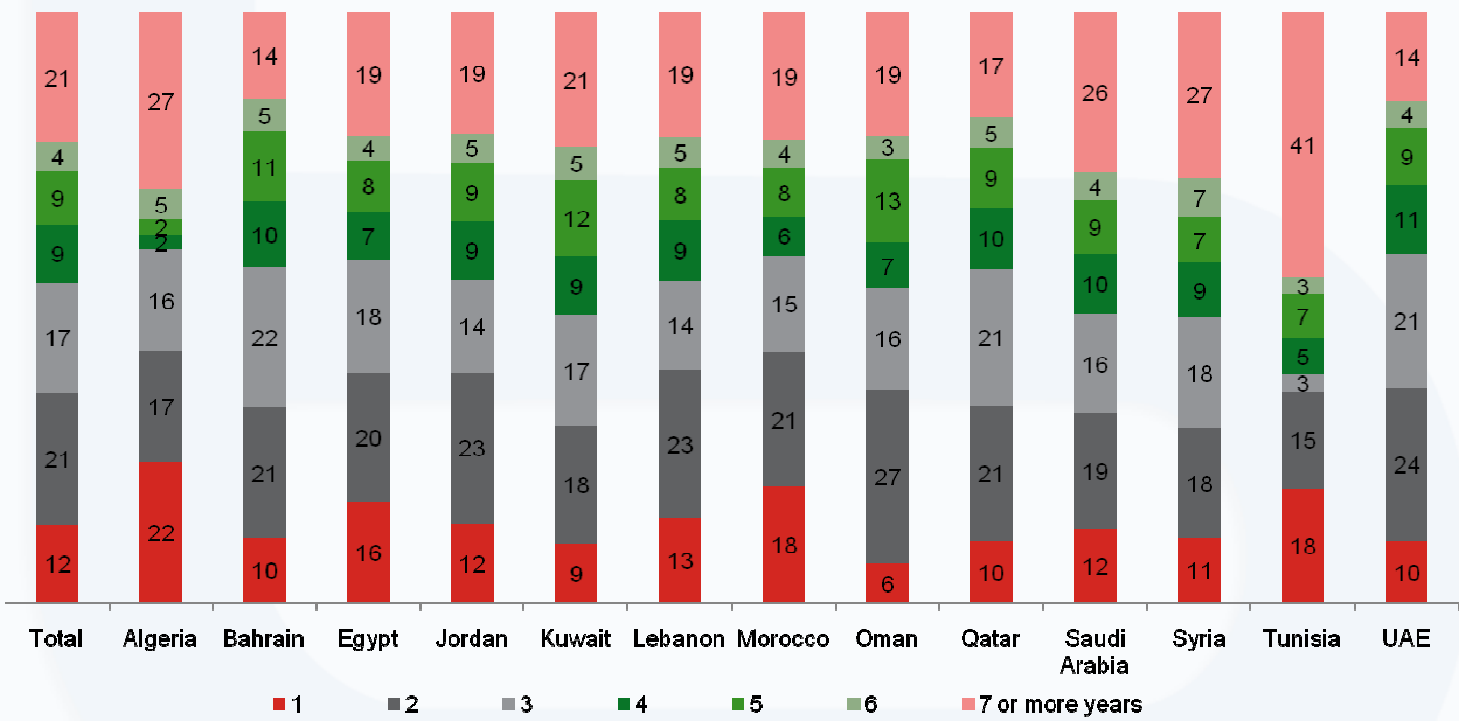
- Job hopping not so common in Tunisia while respondents in Bahrain, Oman and UAE seem to change jobs relatively more frequently



Q: How many jobs have you held over the past 5 years?

Average Length of Jobs Held

- Bahrain and UAE seem to exhibit lower levels of loyalty – fewer respondents spending 7 or more years in the same job
- Algeria displays an interesting pattern – it has a significant proportion of respondents who are more loyal and it also has the largest proportion of job hoppers (those spending an average of one year in a job)

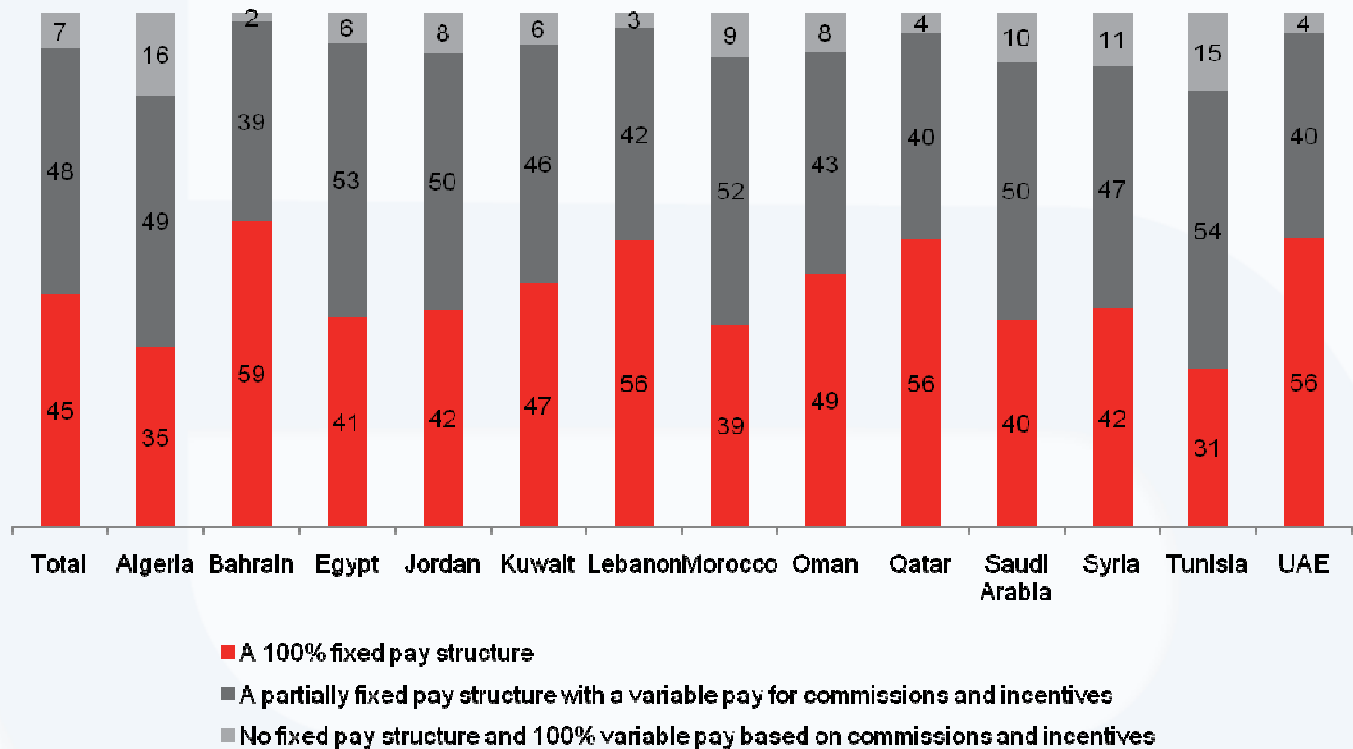


Q What is the average length of time you have ever held a job (in years)?

Base: Total (10,699), Algeria (129), Bahrain (116), Egypt (2082), Jordan (708), Kuwait (500), Lebanon (313), Morocco (452), Oman (116), Qatar (289), KSA (3391), Syria (123), Tunisia (73), UAE (2225)

Preferred pay structure

- Bahrain, Lebanon, Qatar and UAE prefer a fixed income structure while Tunisia, Algeria, Morocco and Saudi skewed towards a variable structure

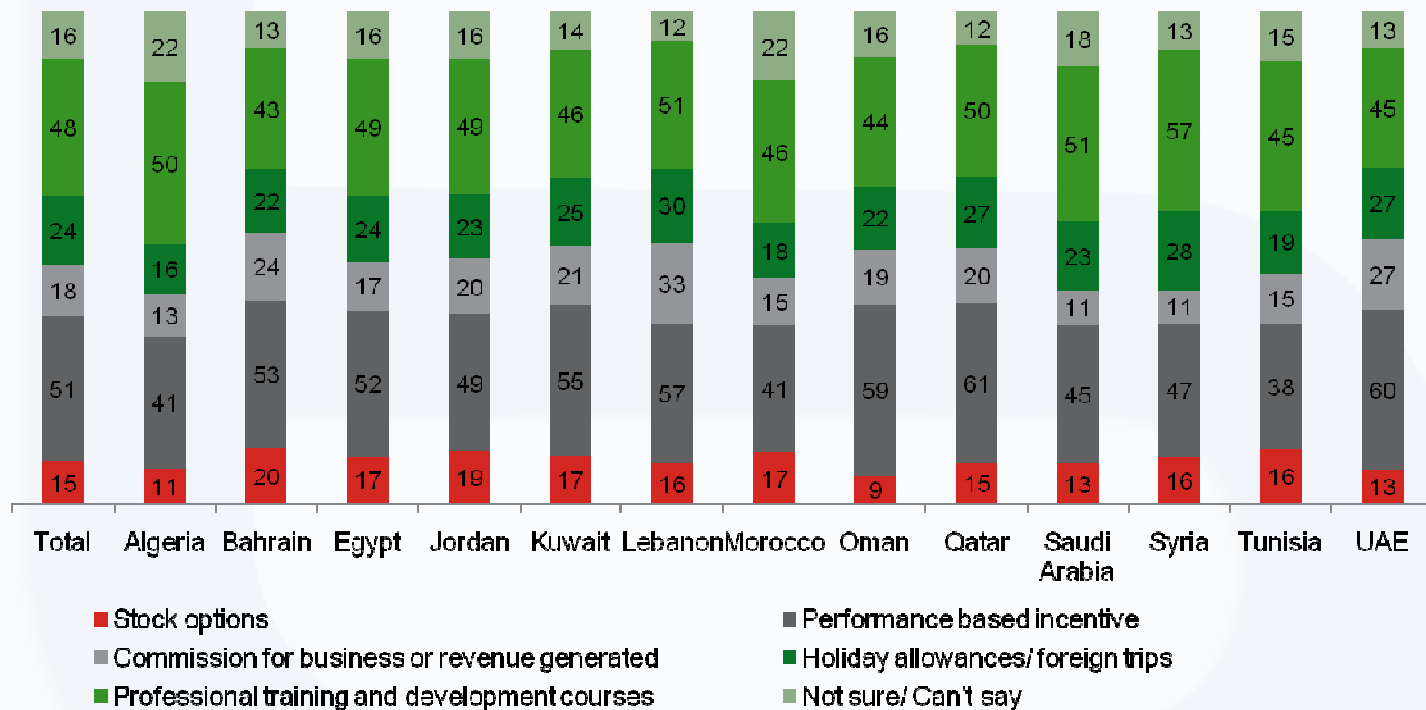


Which of the following do you think is a better pay structure for you?

Base: Total (10,699), Algeria (129), Bahrain (116), Egypt (2082), Jordan (708), Kuwait (500), Lebanon (313), Morocco (452), Oman (116), Qatar (289), KSA (3391), Syria (123), Tunisia (73), UAE (2225)

Additional Incentives

- Qatar, Oman and UAE would like to have performance based incentives while Syria looks for professional training and development



Which of the following do you think would be attractive incentives for you to be included in your compensation package in lieu of a proportion of your salary?

Current Package

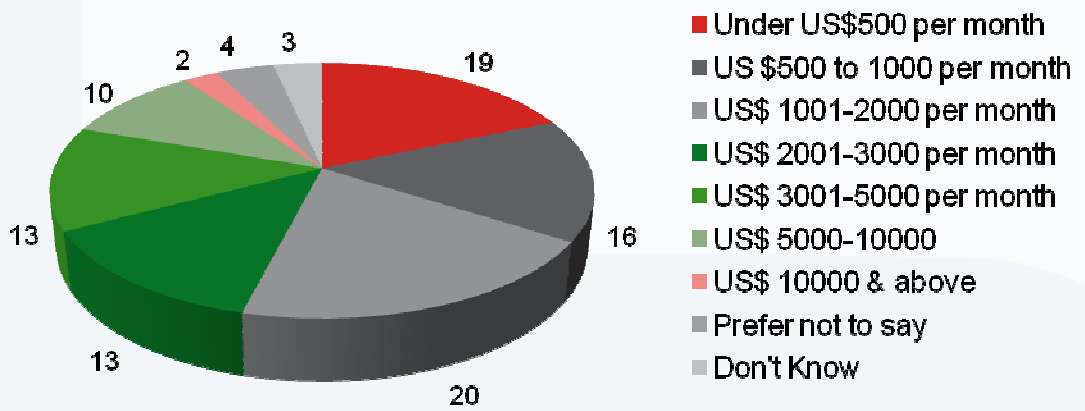
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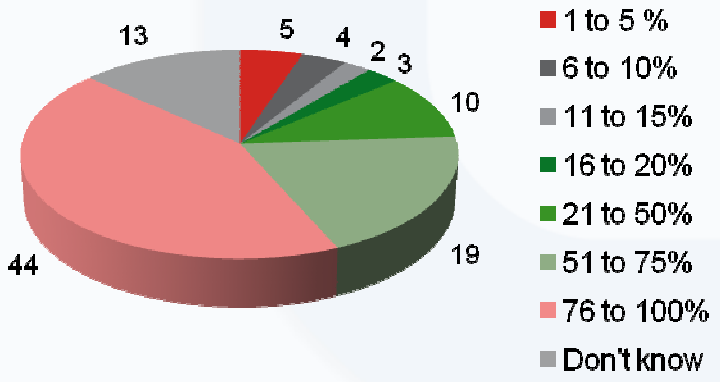
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Monthly Income

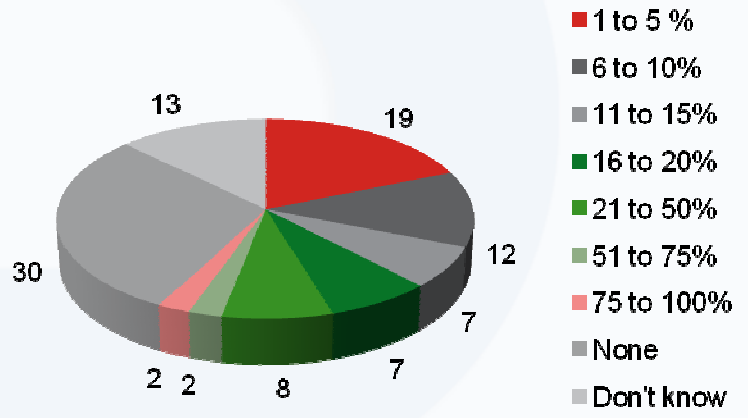
Personal Income



Basic salary

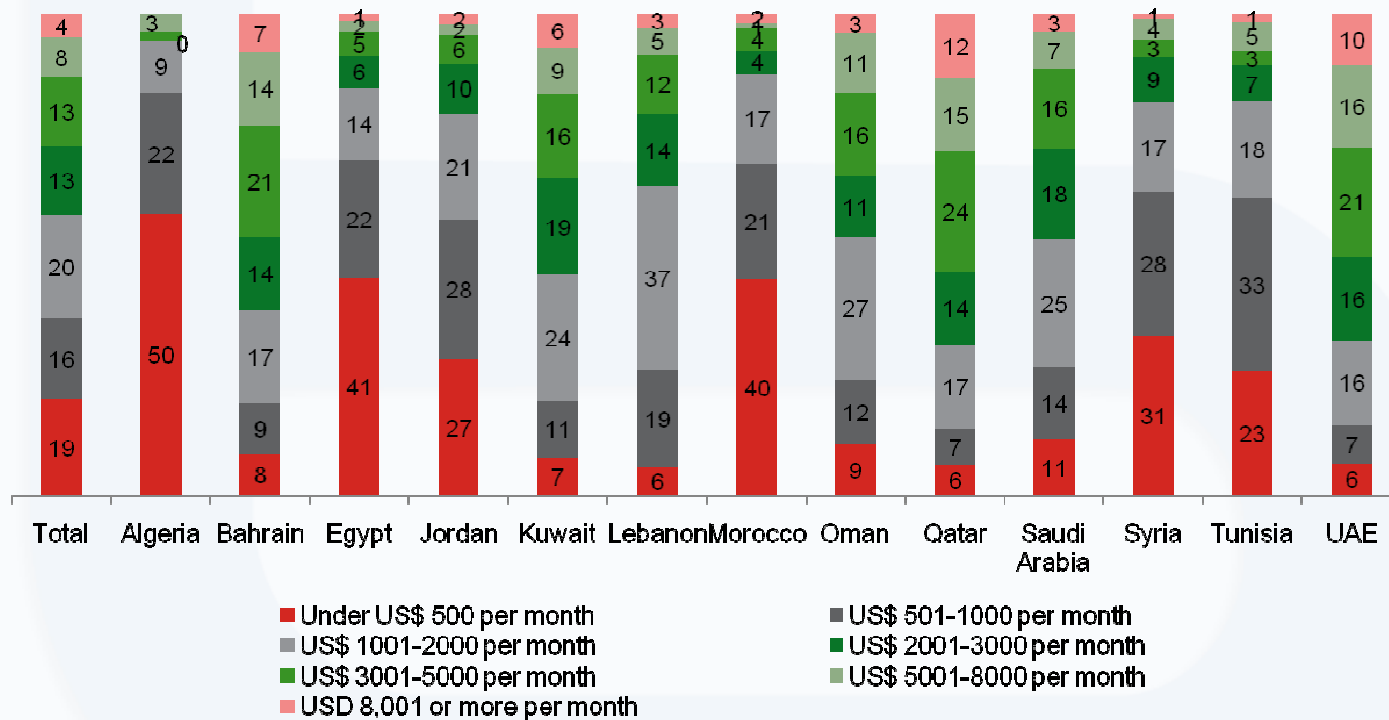


Bonus, commision etc



Personal income by country

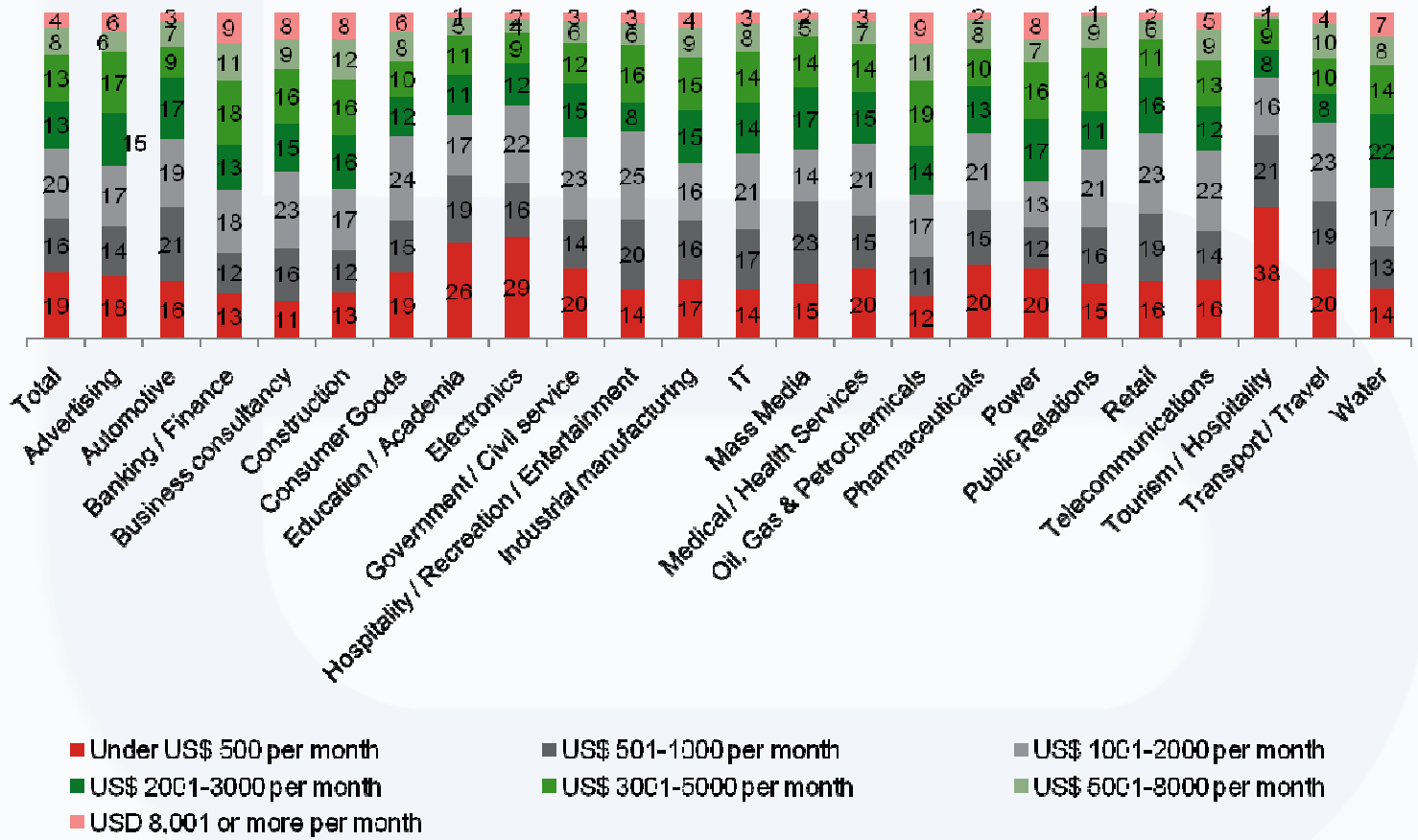
- Among the GCC countries, Qatar and UAE have a higher average income
- Algeria, Egypt and Morocco have lower personal income levels



Q: Which of the following income levels does your personal monthly income fall into?

Personal income by industry

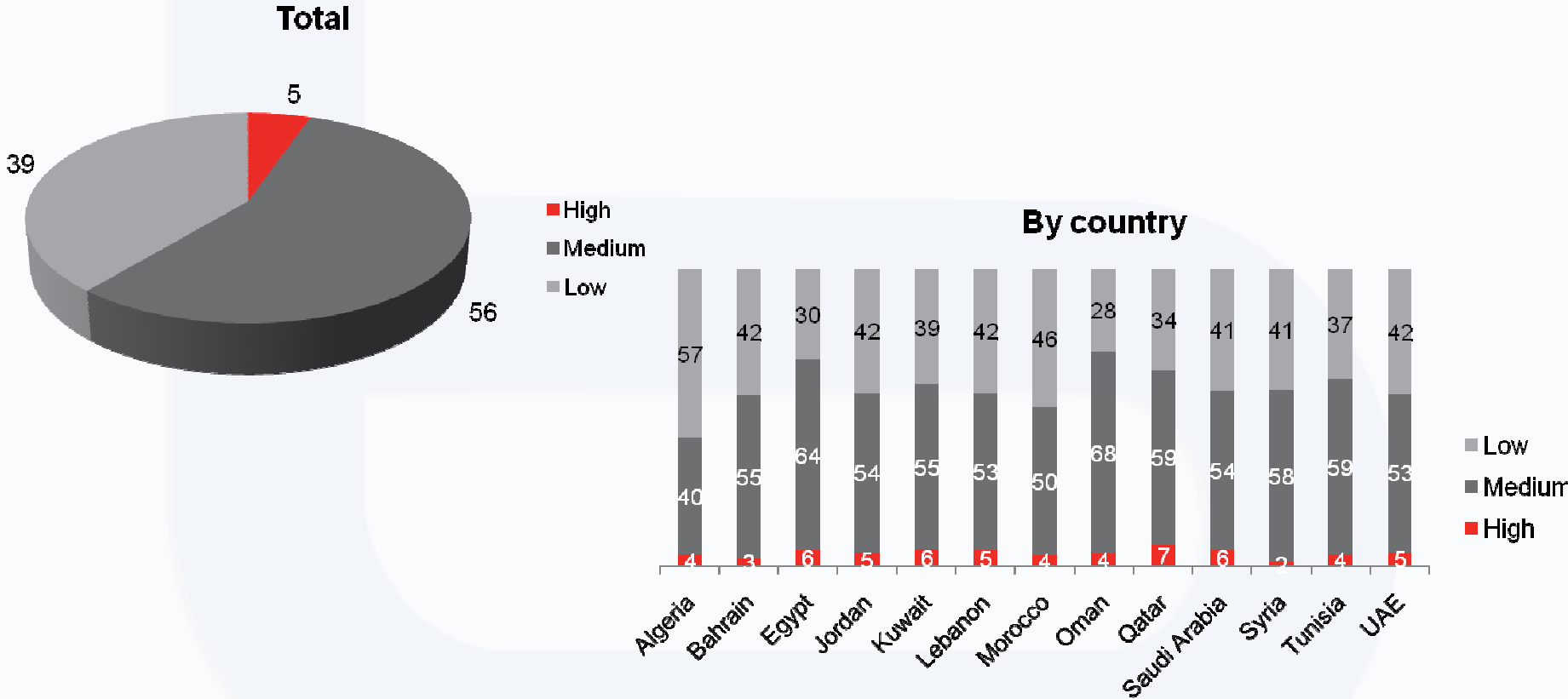
- Banking/Finance, Construction and Oil and Gas more well paid than other industries
- Education, Electronics and Hospitality/Tourism among the lower paid industries



Q: Which of the following income levels does your personal monthly income fall into?

Satisfaction with Income

- Generally, very few people highly satisfied with their salary
- Relatively higher proportion of financially dissatisfied employees in Algeria and Morocco



Q: Please indicate your level of satisfaction with your current salary

Base: Total (10,699), Algeria (129), Bahrain (116), Egypt (2082), Jordan (708), Kuwait (500), Lebanon (313), Morocco (452), Oman (116), Qatar (289), KSA (3391), Syria (123), Tunisia (73), UAE (2225)

Additional Benefits - By Country

- Housing and air ticket allowances more prevalent in GCC countries – probably driven by the expatriate benefits
- Around a quarter claimed to have got a bonus

	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
Basic salary	91	82	96	90	92	89	90	79	95	93	94	89	85	92
Personal medical insurance	52	54	35	49	54	34	42	52	57	45	57	37	51	54
Housing allowance	40	4	38	8	7	25	5	12	56	58	65	11	7	60
Transport allowance	40	35	32	25	26	27	57	25	45	52	50	28	19	45
Family medical insurance	30	27	26	19	30	19	18	31	35	26	40	19	34	30
Personal annual air ticket	28	11	31	5	4	24	4	2	46	53	37	7	1	54
Bonus	27	21	25	37	30	33	41	14	36	35	18	30	27	29

Q: Please tell us which of the following are included in the compensation / benefits you receive from your current company

Base: Total (10,699), Algeria (129), Bahrain (116), Egypt (2082), Jordan (708), Kuwait (500), Lebanon (313), Morocco (452), Oman (116), Qatar (289), KSA (3391), Syria (123), Tunisia (73), UAE (2225)

Salary Comparisons and Expectations

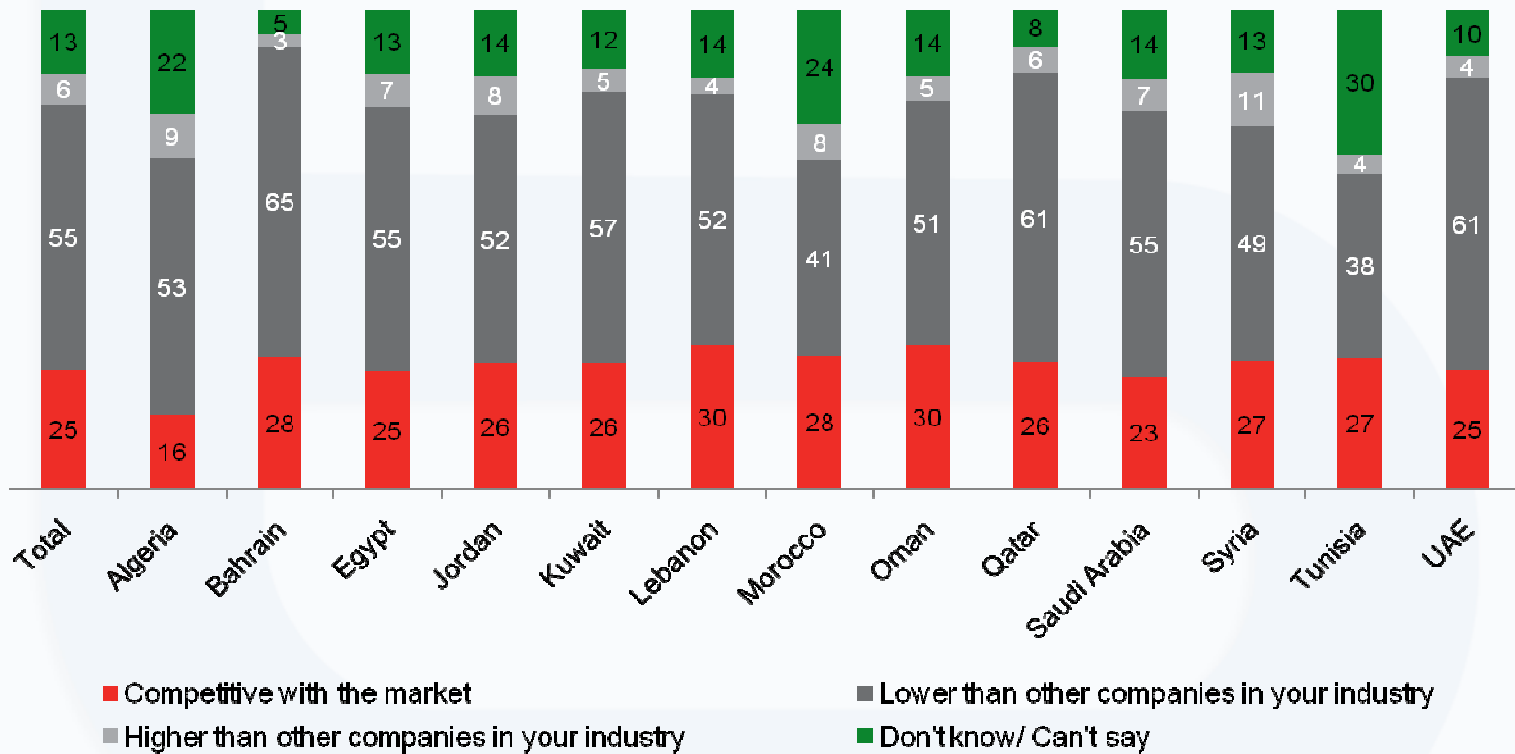
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Level of Competitiveness of Packages

- Employees in Bahrain, Qatar and UAE feel their packages are not as competitive compared to other organizations

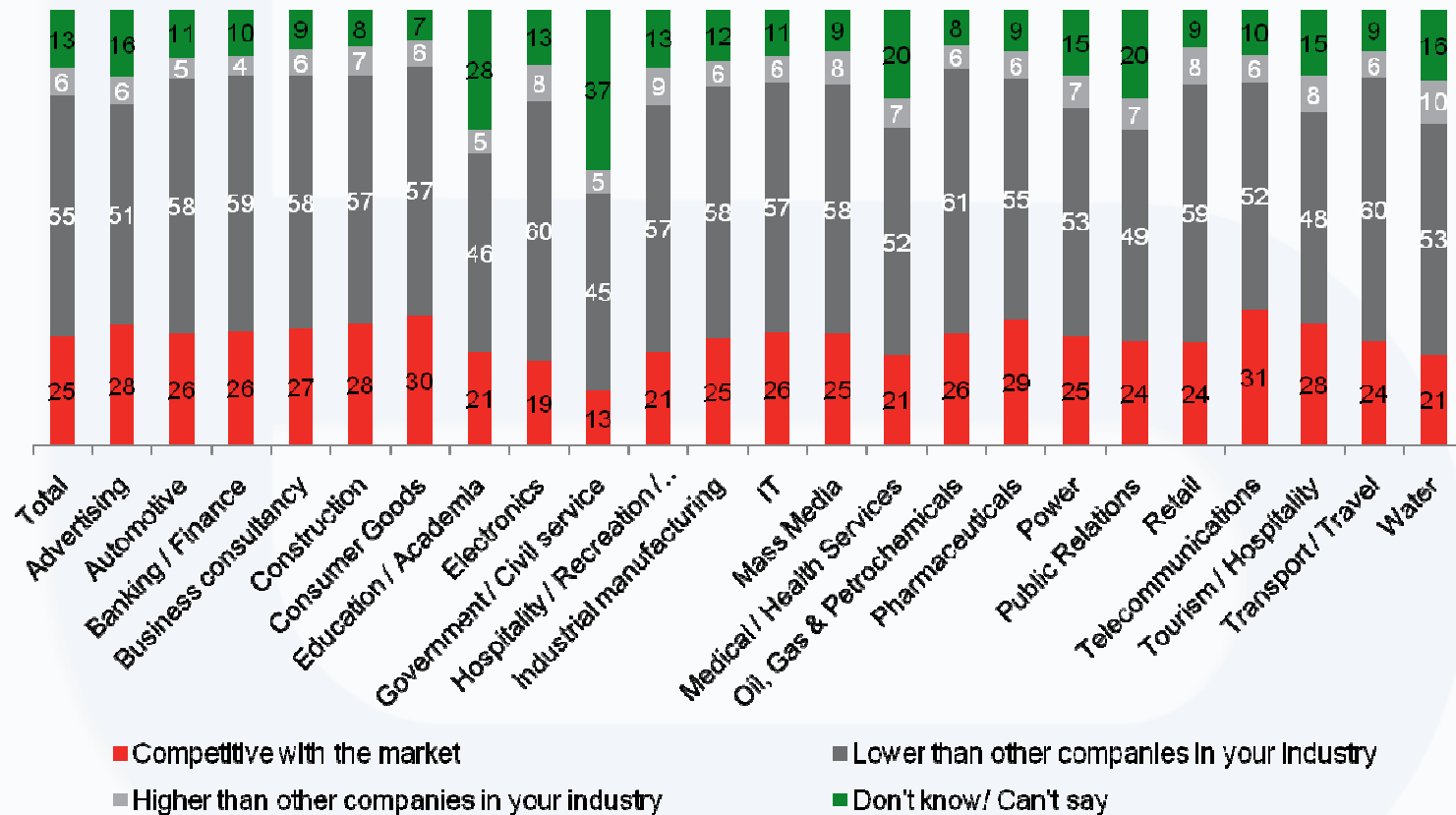


Q: Do you feel pay in your company is...

Base: Total (10,699), Algeria (129), Bahrain (116), Egypt (2082), Jordan (708), Kuwait (500), Lebanon (313), Morocco (452), Oman (116), Qatar (289), KSA (3391), Syria (123), Tunisia (73), UAE (2225)

Level of Competitiveness of Packages by Industry

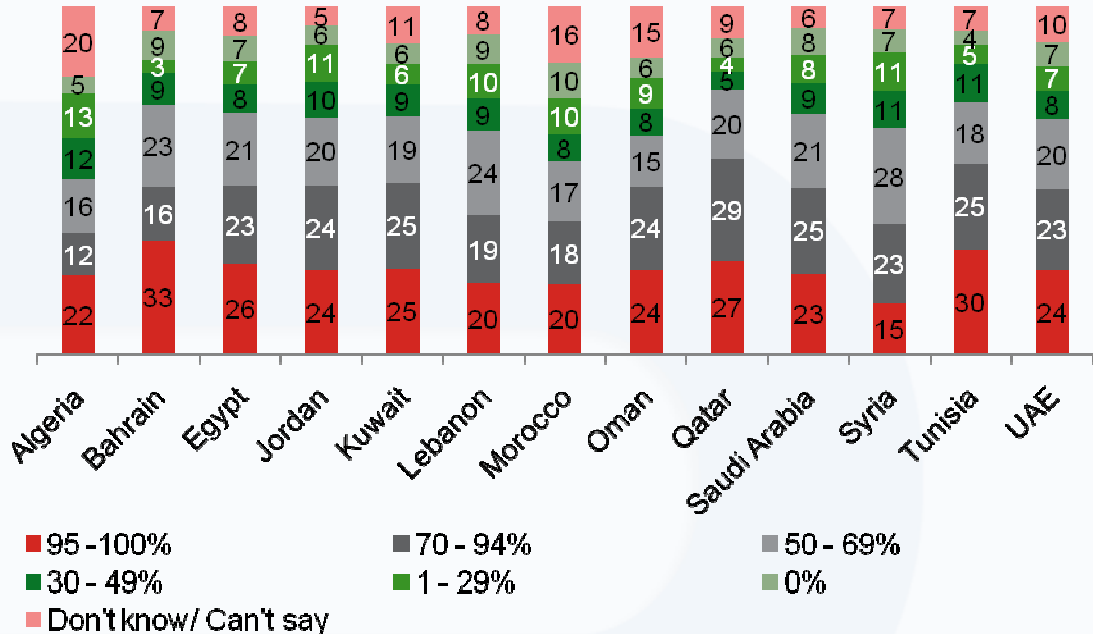
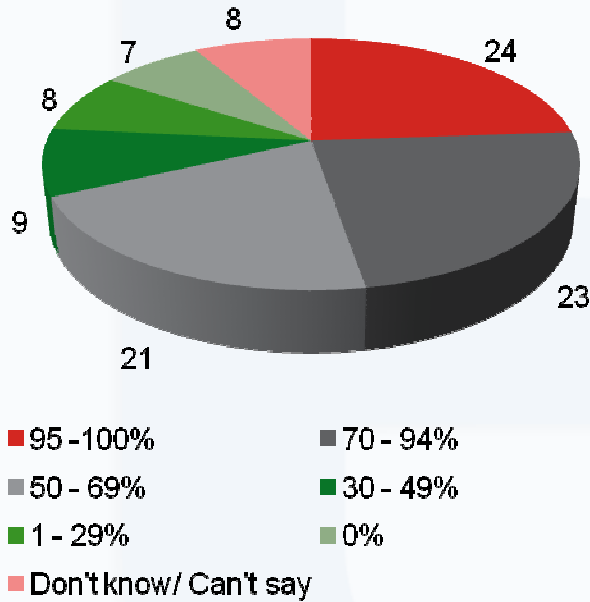
- Those in the oil and gas, transport, electronics, banking and retail industries feel their peers in other organisations within the same industry are getting more



Q: Do you feel pay in your company is...

Loyalty towards the company

- Around a quarter feel that nearly their entire loyalty towards their organisation is dependent on the salary they receive
- Loyalty in Bahrain is more salary driven than other countries

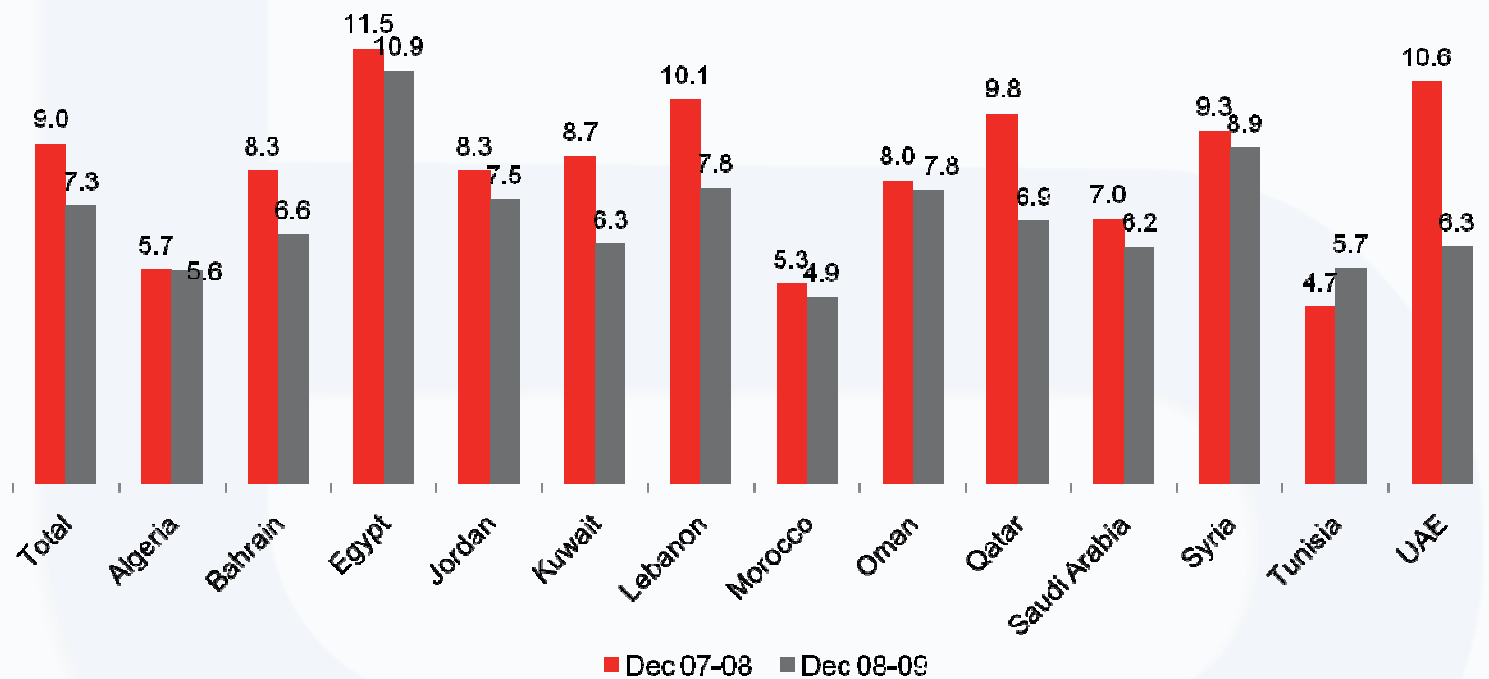


To what extent is your loyalty to your company directly linked to the salary you receive?

Base: Total (10,699), Algeria (129), Bahrain (116), Egypt (2082), Jordan (708), Kuwait (500), Lebanon (313), Morocco (452), Oman (116), Qatar (289), KSA (3391), Syria (123), Tunisia (73), UAE (2225)

Salary raise in past 12 months vs. previous year by country

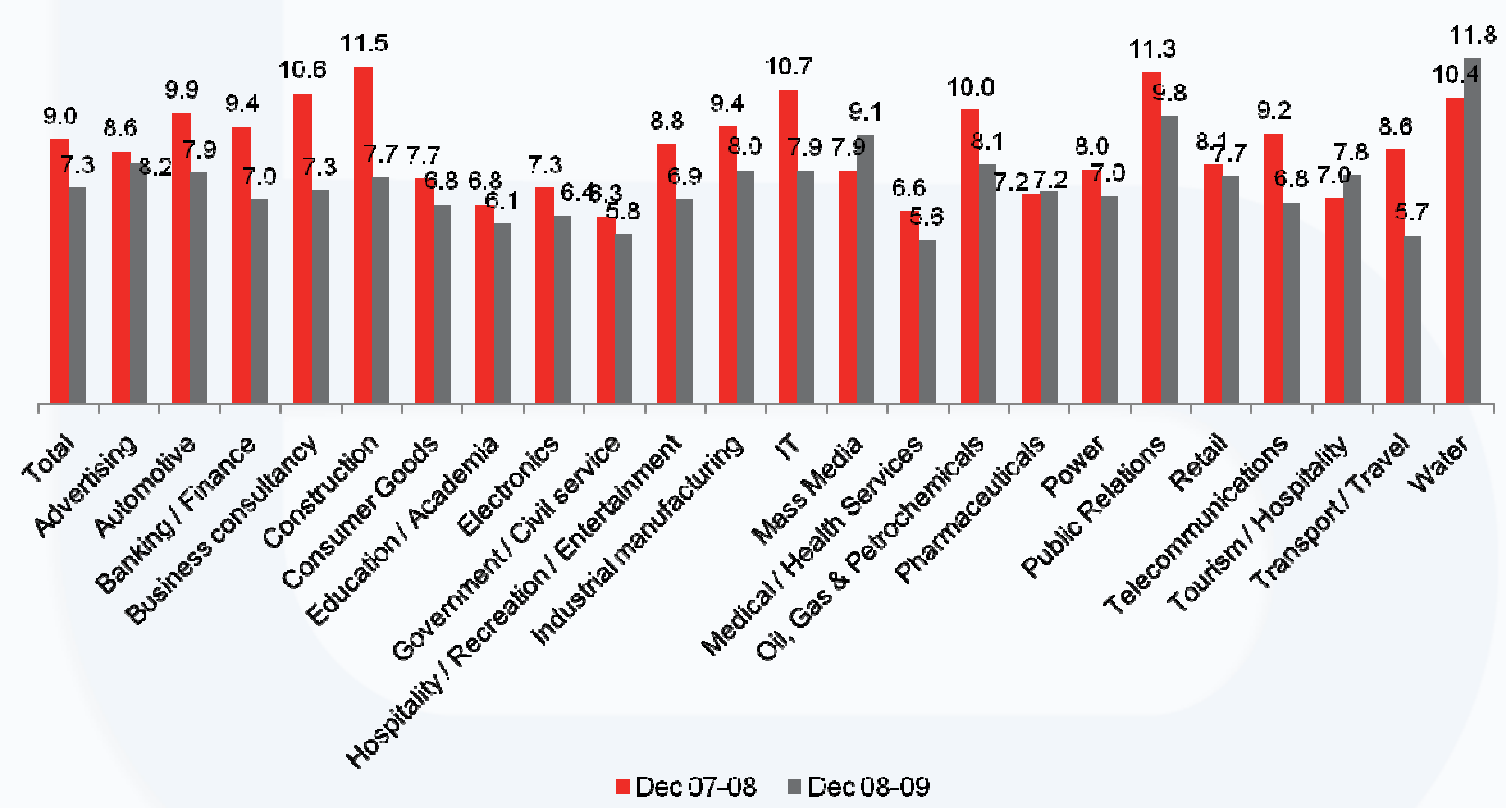
- Most countries received a larger raise in the previous year (2008) than in 2009 – gap is highest in the UAE



Q: Can you please select the total percentage raise you received in calendar year 2008 (December 2007 – December 2008)?
Q: Can you please select the total percentage raise you received in the past 12 months (December 2008 – December 2009)?

Salary raise in past 12 months vs. previous year – by industry

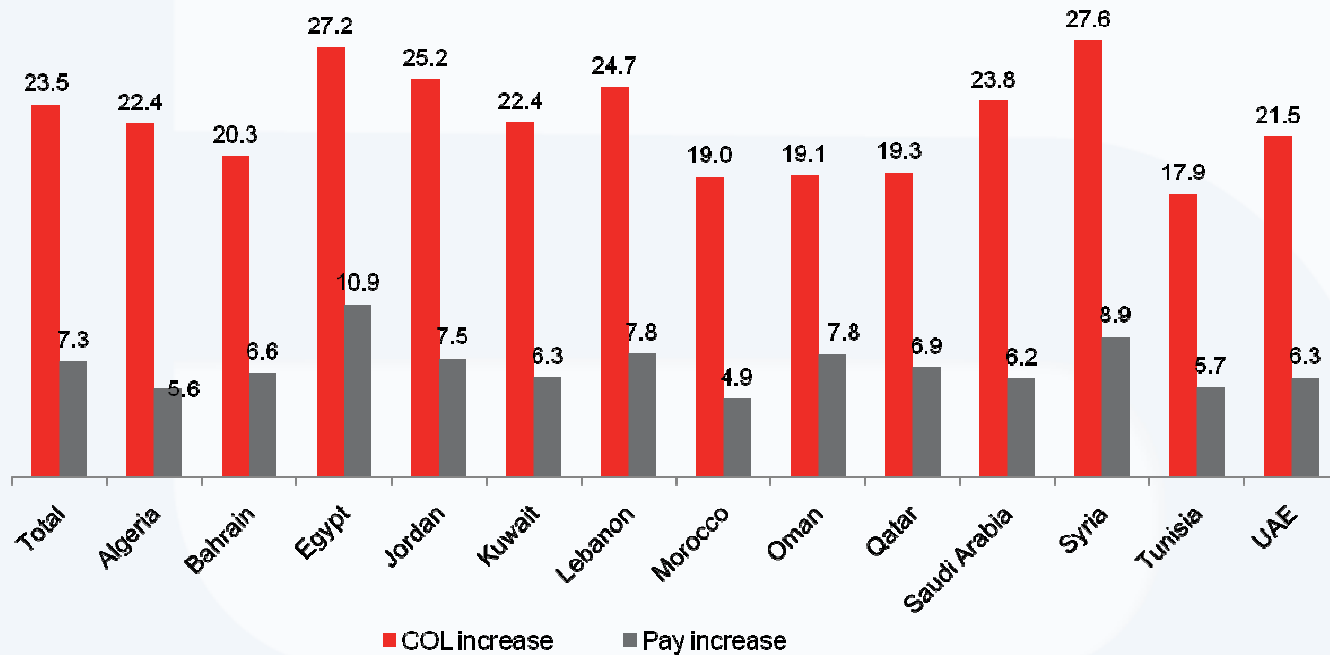
- Business consultancy, transport/travel, IT, telecoms, construction and banking/finance among the hardest hit



Q: Can you please select the total percentage raise you received in calendar year 2008 (December 2007 – December 2008)?
 Q: Can you please select the total percentage raise you received in the past 12 months (December 2008 – December 2009)?

Average salary raise in the past 12 months against Cost of Living (COL) raise in the past 12 months

- All countries feel that cost of living has risen 3-4 times more than salary increments

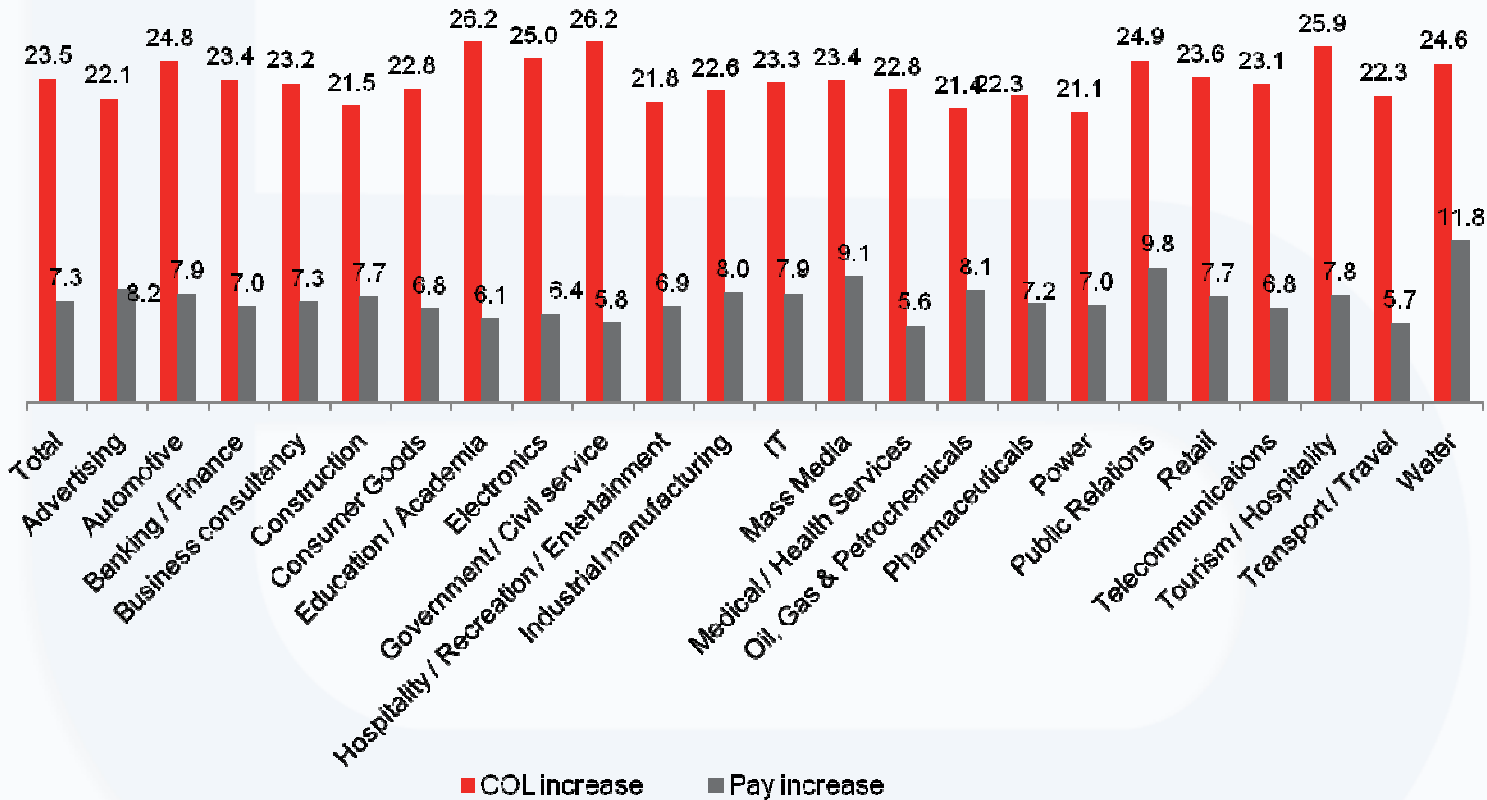


Q: Can you please select the total percentage raise you received in the past 12 months (December 2008 – December 2009)?
 Q: On average by what percentage do you think your cost of living has increased in the last 12 months?

Base: Total (10,699), Algeria (129), Bahrain (116), Egypt (2082), Jordan (708), Kuwait (500), Lebanon (313), Morocco (452), Oman (116), Qatar (289), KSA (3391), Syria (123), Tunisia (73), UAE (2225)

Average salary raise in the past 12 months against COL raise in the past 12 months – by industry

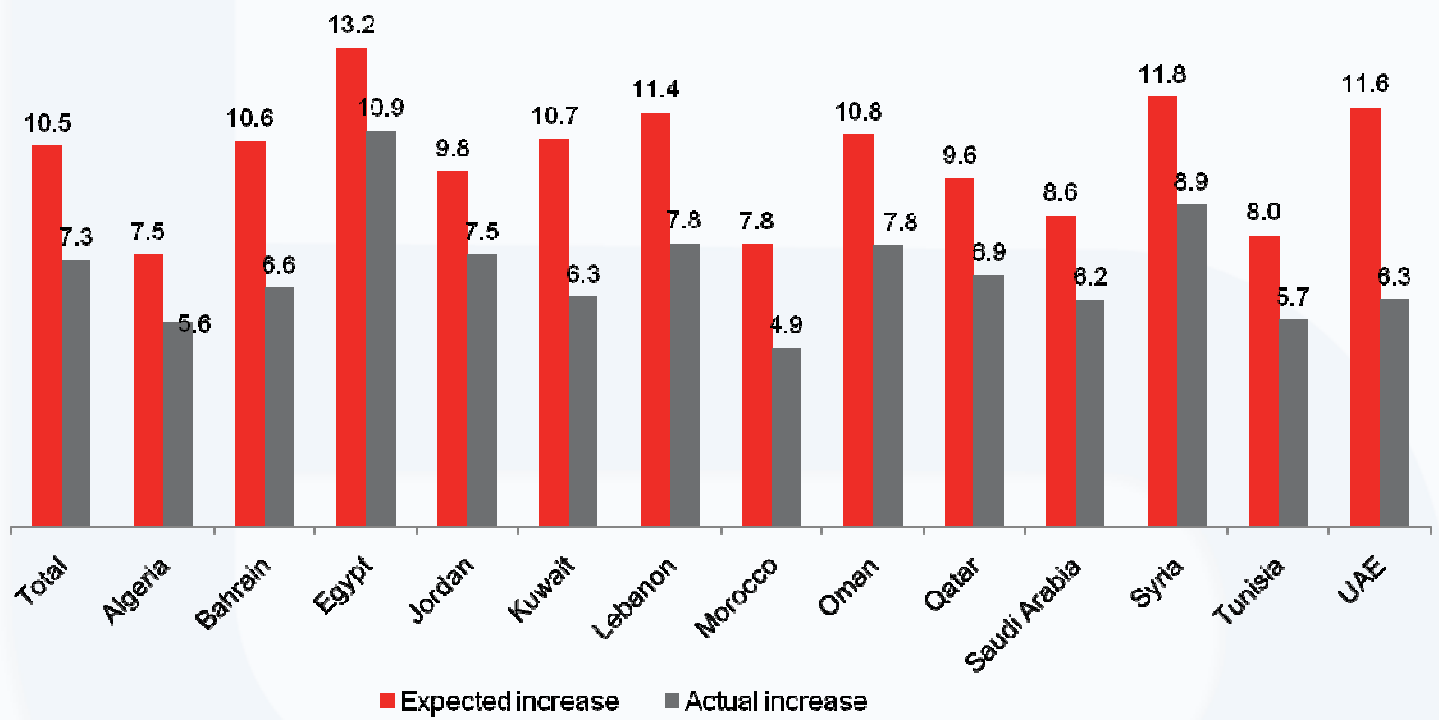
- The fact that salary has been unable to keep pace with cost of living has been felt across industries



Q: Can you please select the total percentage raise you received in the past 12 months (December 2008 – December 2009)?
 Q: On average by what percentage do you think your cost of living has increased in the last 12 months?

Salary raise received in the past 12 months vs. expected in the next 12 months

All countries have an optimistic view of the future



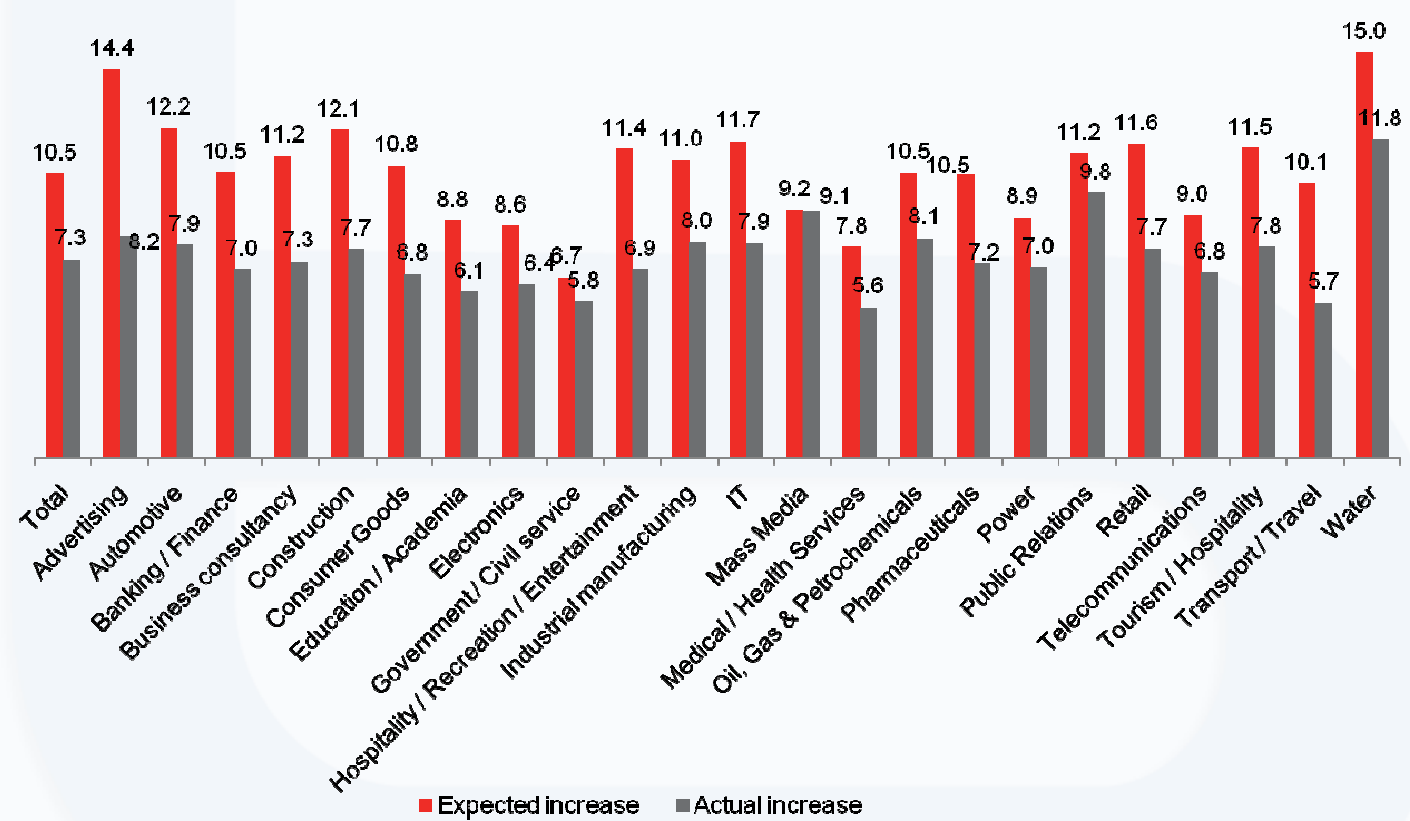
Q: Can you please select the total percentage raise you received in the past 12 months (December 2008 – December 2009)?

Q: Can you please select the total percentage raise you expect to receive in the next 12 months (December 2009 – December 2010)?

Base: Total (10,699), Algeria (129), Bahrain (116), Egypt (2082), Jordan (708), Kuwait (500), Lebanon (313), Morocco (452), Oman (116), Qatar (289), KSA (3391), Syria (123), Tunisia (73), UAE (2225)

Salary raise received in the past 12 months vs. expected in the next 12 months – by industry

- Advertising and water industries feel that they would get significantly higher increases than last year
- Government and mass media employees opine that their increments would remain similar to those of last year

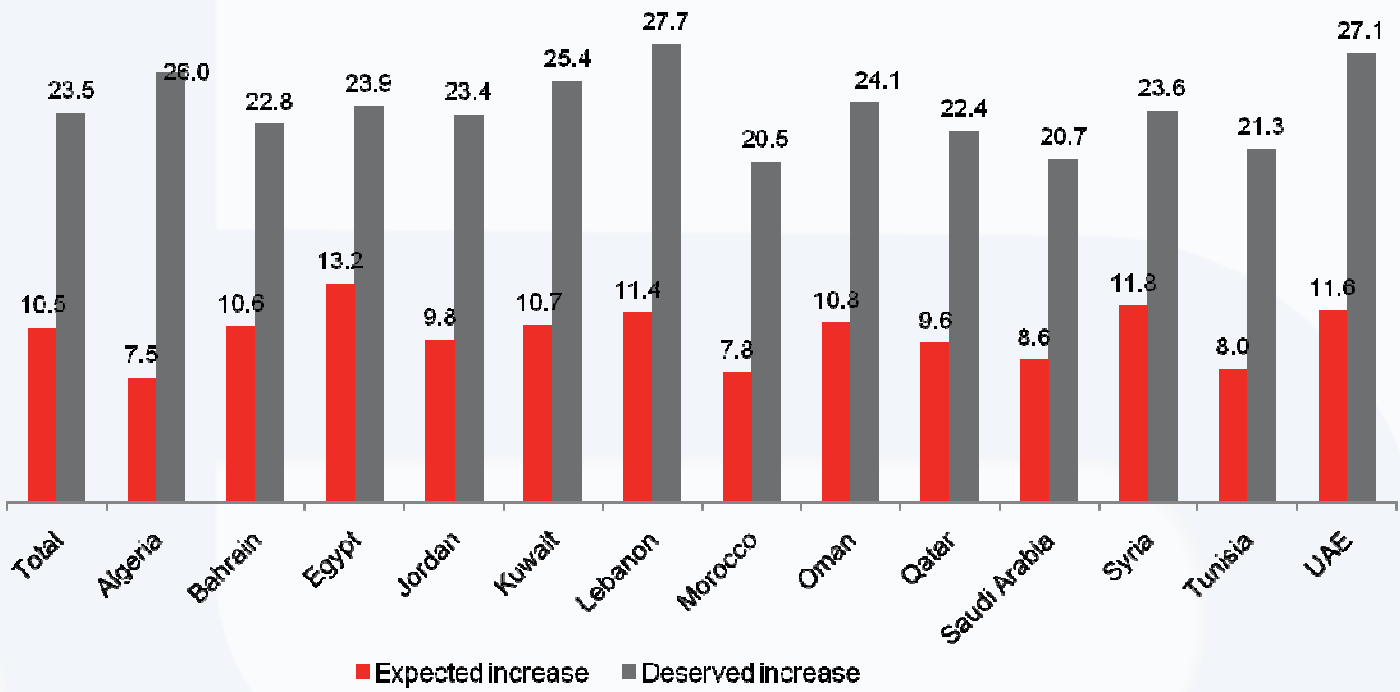


Q: Can you please select the total percentage raise you received in the past 12 months (December 2008 – December 2009)?

Q: Can you please select the total percentage raise you expect to receive in the next 12 months (December 2009 – December 2010)?

Percentage of raise DESERVED vs. EXPECTED

- All countries feel that they deserve a pay increase of 2 to 3 times what they are likely to get next year



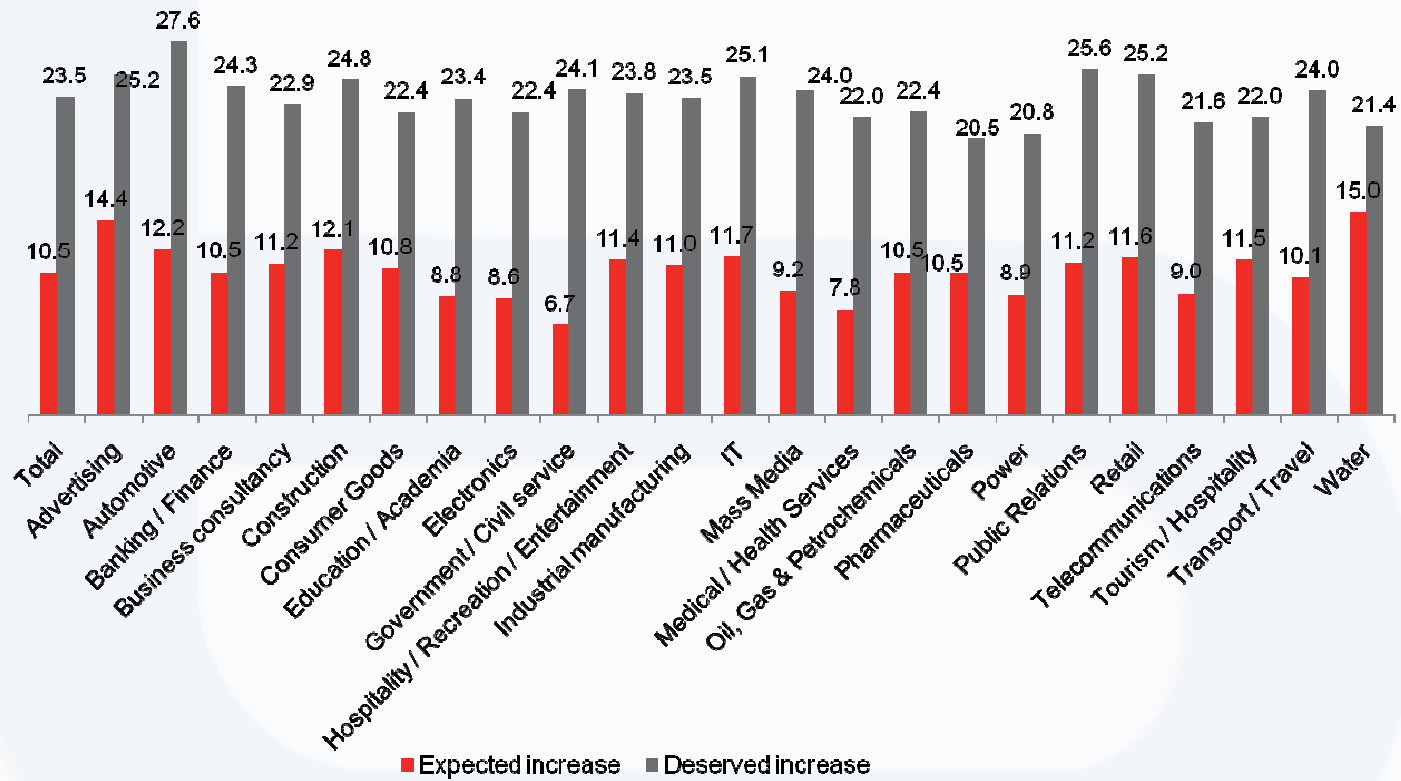
Q: Can you please select the total percentage raise you expect to receive in the next 12 months (December 2009 – December 2010)?

Q: Being as realistic as possible, can you please select the total percentage raise you think you currently deserve?

Base: Total (10,699), Algeria (129), Bahrain (116), Egypt (2082), Jordan (708), Kuwait (500), Lebanon (313), Morocco (452), Oman (116), Qatar (289), KSA (3391), Syria (123), Tunisia (73), UAE (2225)

Percentage of raise DESERVED vs. EXPECTED – by industry

- Across industries, a 20+% increment is thought to be deserved

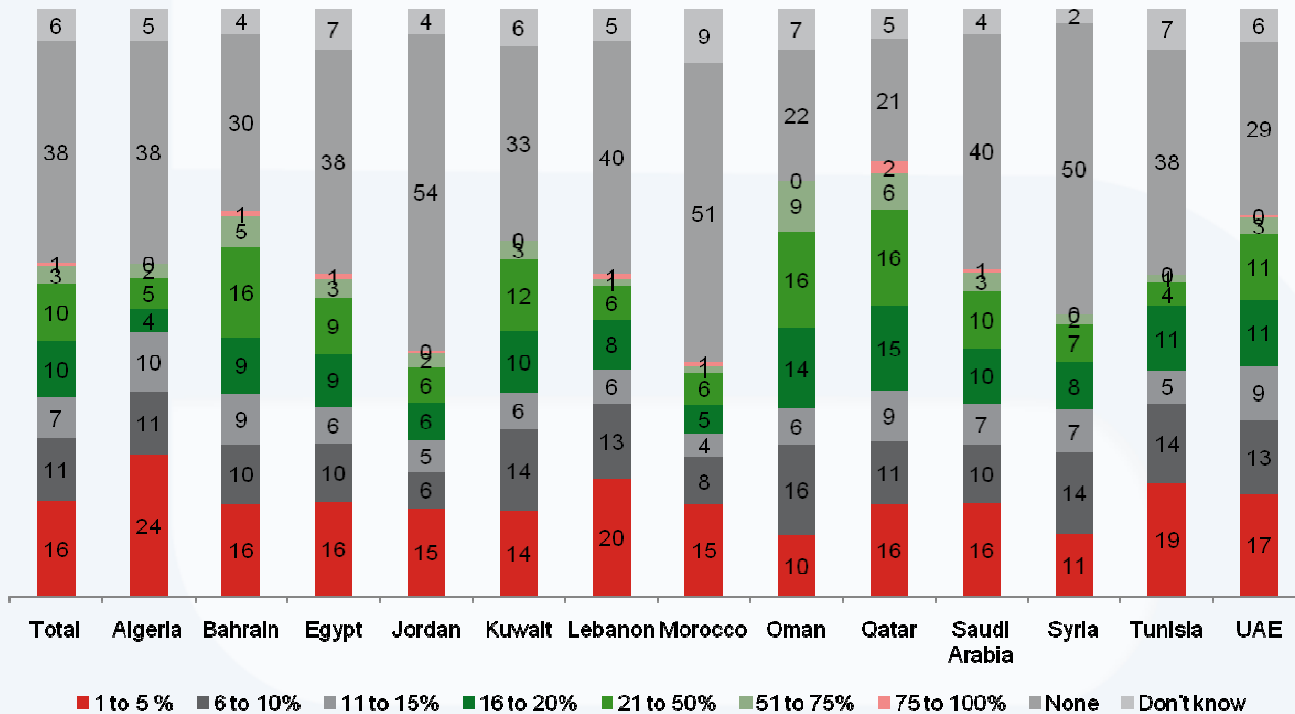


Q: Can you please select the total percentage raise you expect to receive in the next 12 months (December 2009 – December 2010)?

Q: Being as realistic as possible, can you please select the total percentage raise you think you currently deserve?

Proportion of Salary Saved

- Most respondents cannot save anything – highest proportions in Jordan, Morocco and Syria

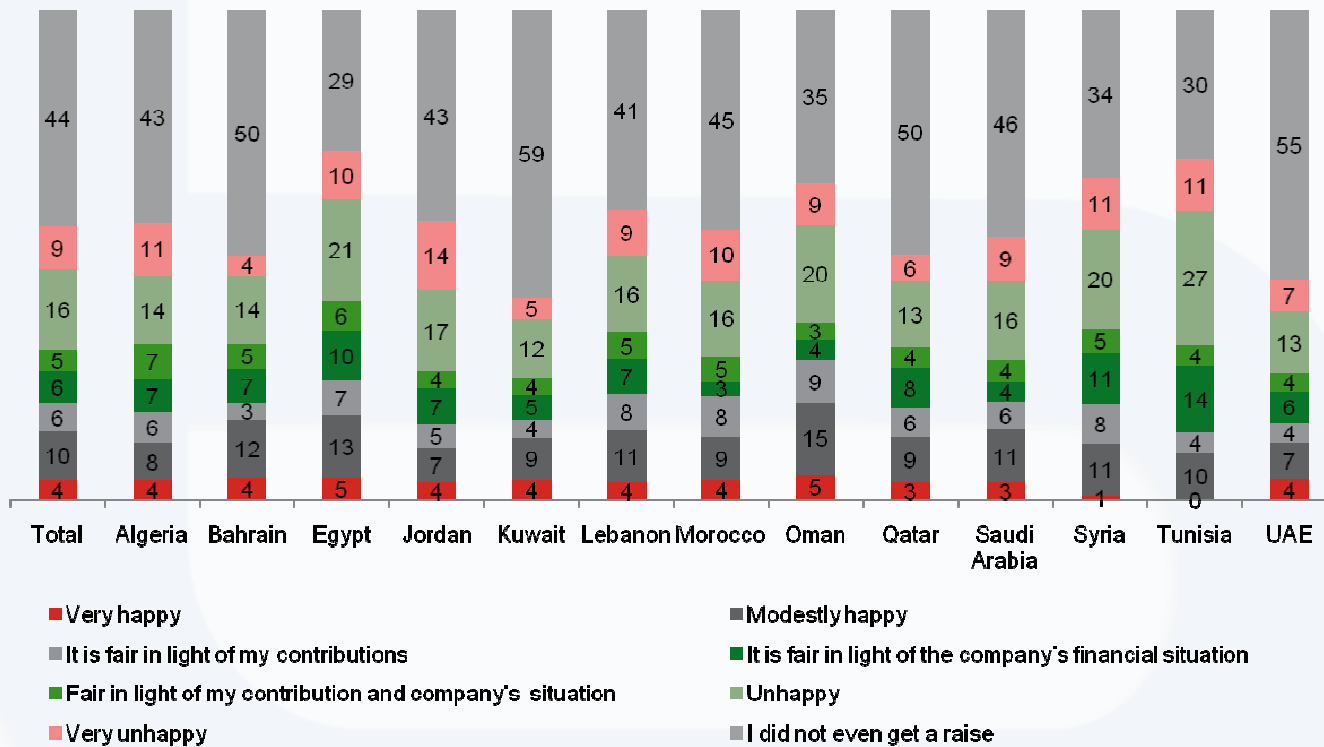


Q: What proportion of your household income is actually saved?

Base: Total (10,699), Algeria (129), Bahrain (116), Egypt (2082), Jordan (708), Kuwait (500), Lebanon (313), Morocco (452), Oman (116), Qatar (289), KSA (3391), Syria (123), Tunisia (73), UAE (2225)

Satisfaction with raise

- Most respondents did not get a raise – higher proportions in the GCC countries except Oman
- Of those who did, the trend was towards dissatisfaction

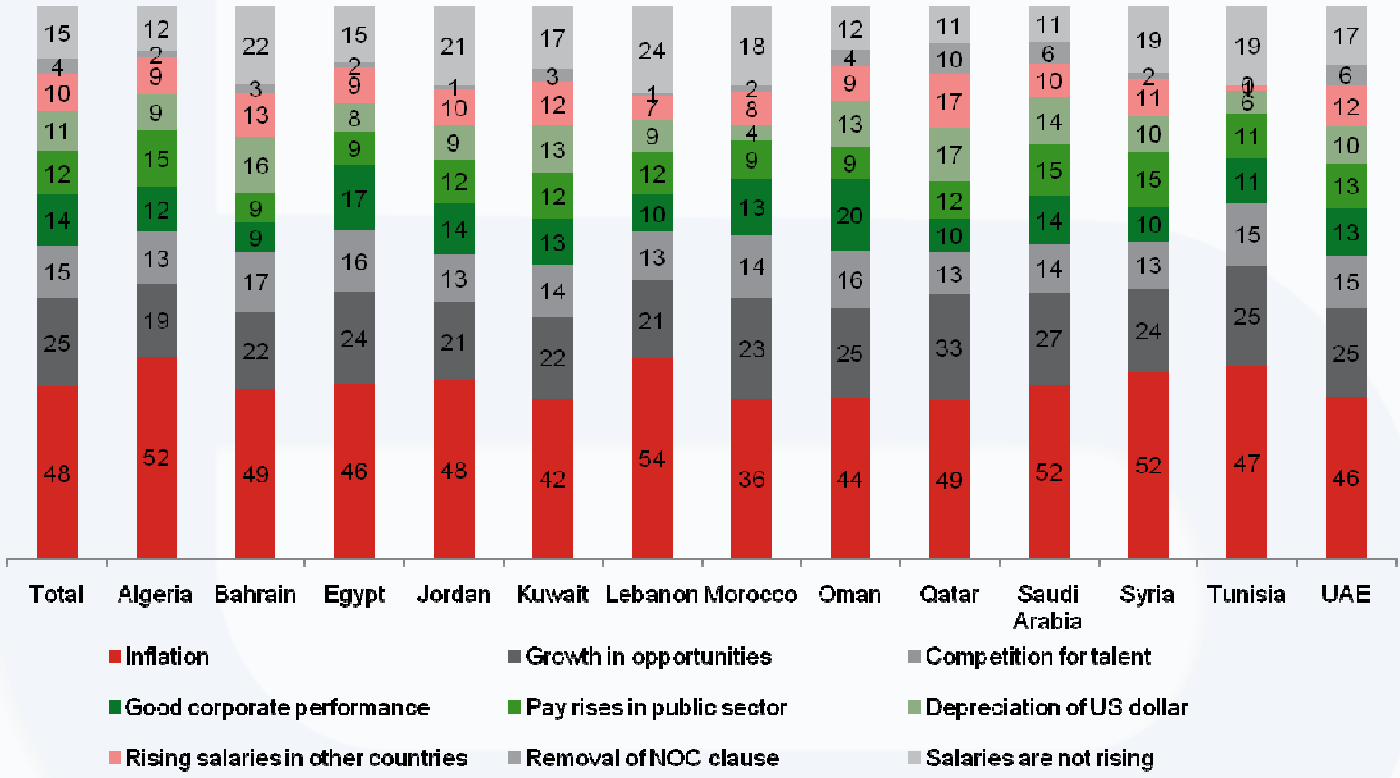


Q: Please indicate how satisfied you are with the salary raise you have received this year

Base: Total (10,699), Algeria (129), Bahrain (116), Egypt (2082), Jordan (708), Kuwait (500), Lebanon (313), Morocco (452), Oman (116), Qatar (289), KSA (3391), Syria (123), Tunisia (73), UAE (2225)

Factors causing salaries to increase

- Inflation followed by growth in opportunities felt to be the major drivers
- For some, salaries have not increased at all

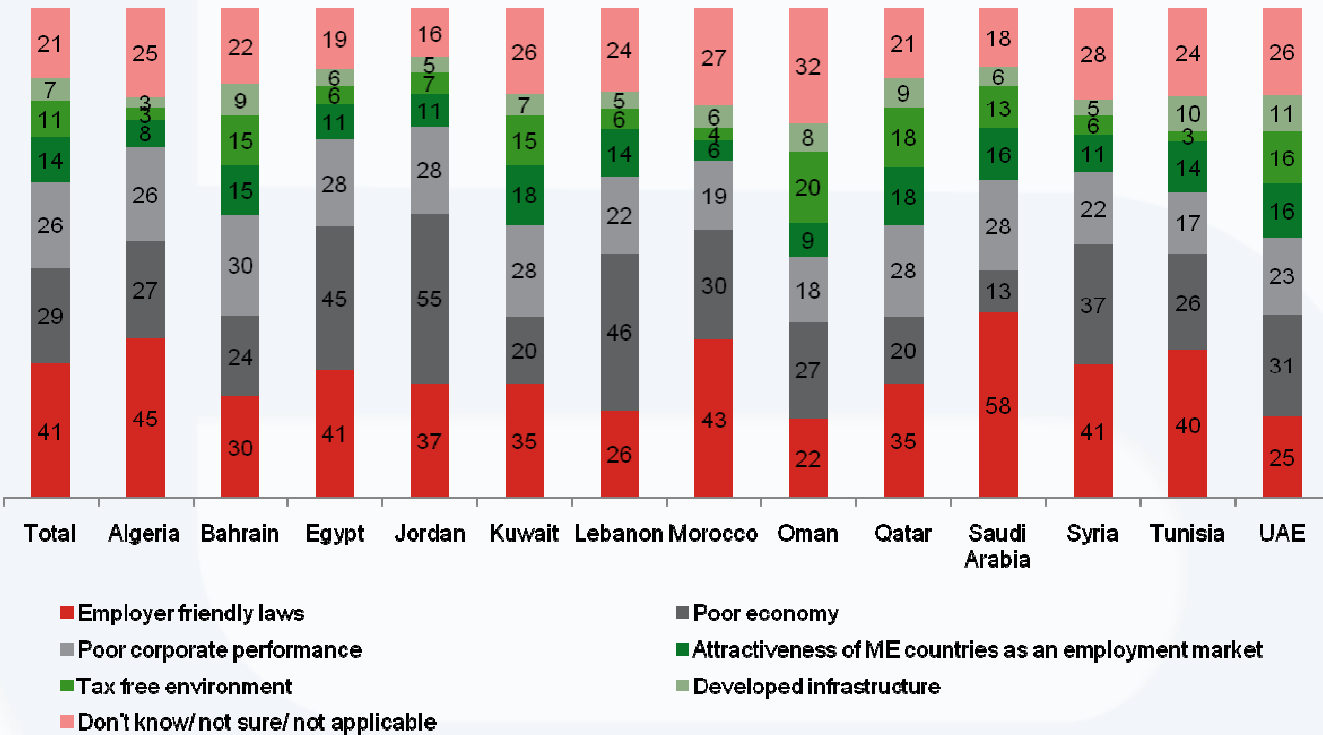


Q: Which of these factors do you think are causing salaries to increase in your country of residence?

Base: Total (10,699), Algeria (129), Bahrain (116), Egypt (2082), Jordan (708), Kuwait (500), Lebanon (313), Morocco (452), Oman (116), Qatar (289), KSA (3391), Syria (123), Tunisia (73), UAE (2225)

Reasons for salaries not increasing

- Employer friendly laws seem to be the salient reason that impacts salary growth of employees followed by poor economy and corporate performance

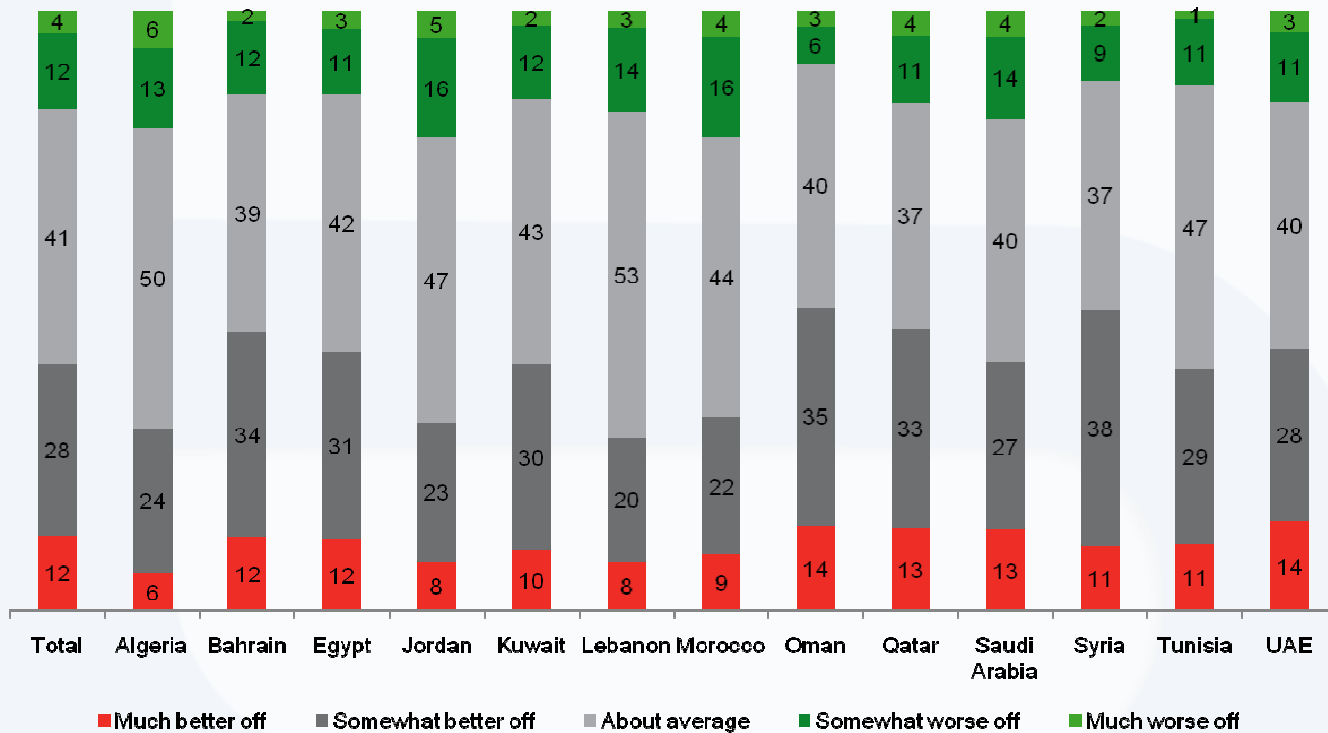


Q: Which of these factors do you think are causing salaries to not increase sufficiently in your country?

Base: Total (10,699), Algeria (129), Bahrain (116), Egypt (2082), Jordan (708), Kuwait (500), Lebanon (313), Morocco (452), Oman (116), Qatar (289), KSA (3391), Syria (123), Tunisia (73), UAE (2225)

Are you better or worse off?

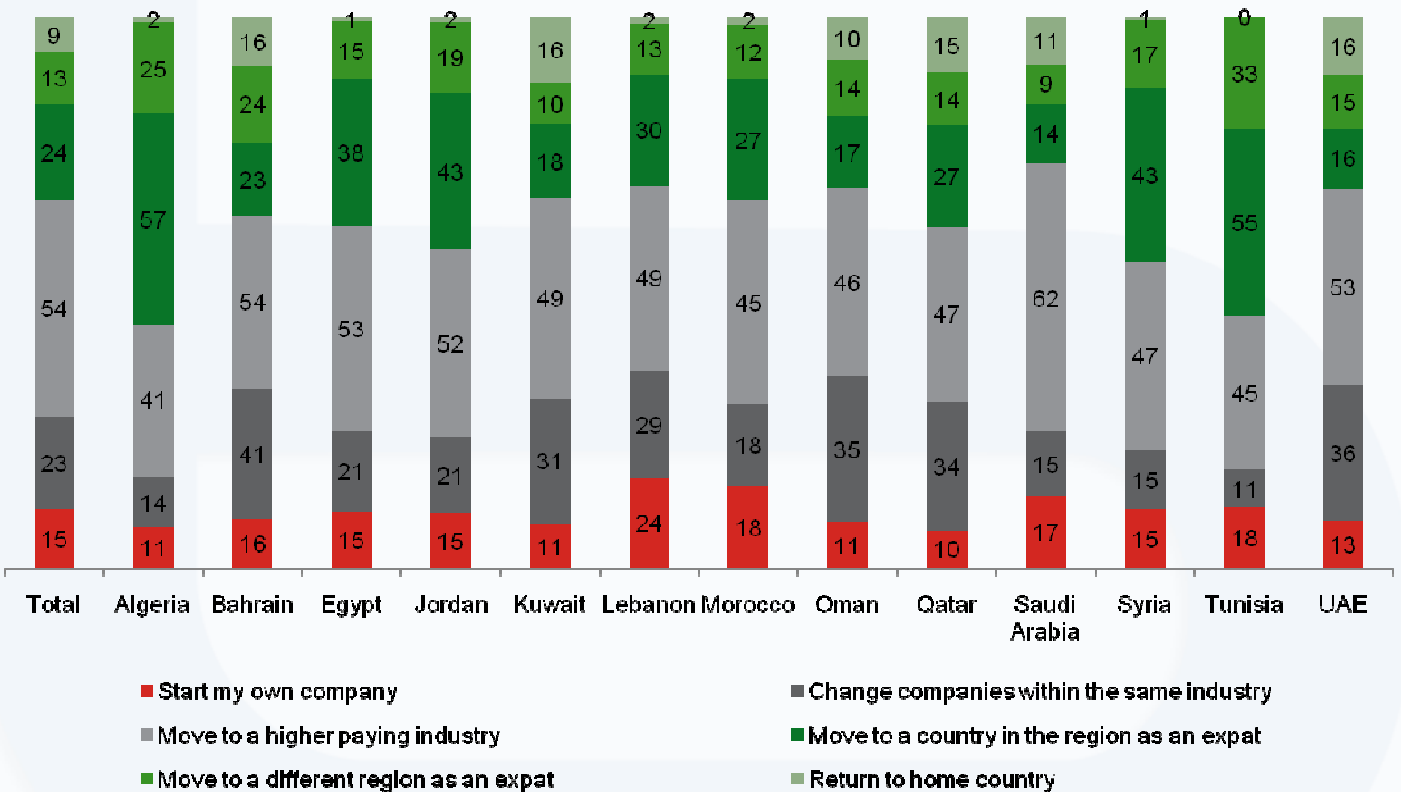
- Most employees feel they are either average or somewhat better off than others
- Oman and Syria have a higher optimism in this regard



Q: Thinking about your quality of life, how would you compare yourself to other people of a similar generation in your country of residence?

Actions to improve quality of life

- Most would move to a higher paying industry and those in non GCC countries plan to move to another country
- Except Saudi, employees in the other GCC countries will consider changing companies in the same industry

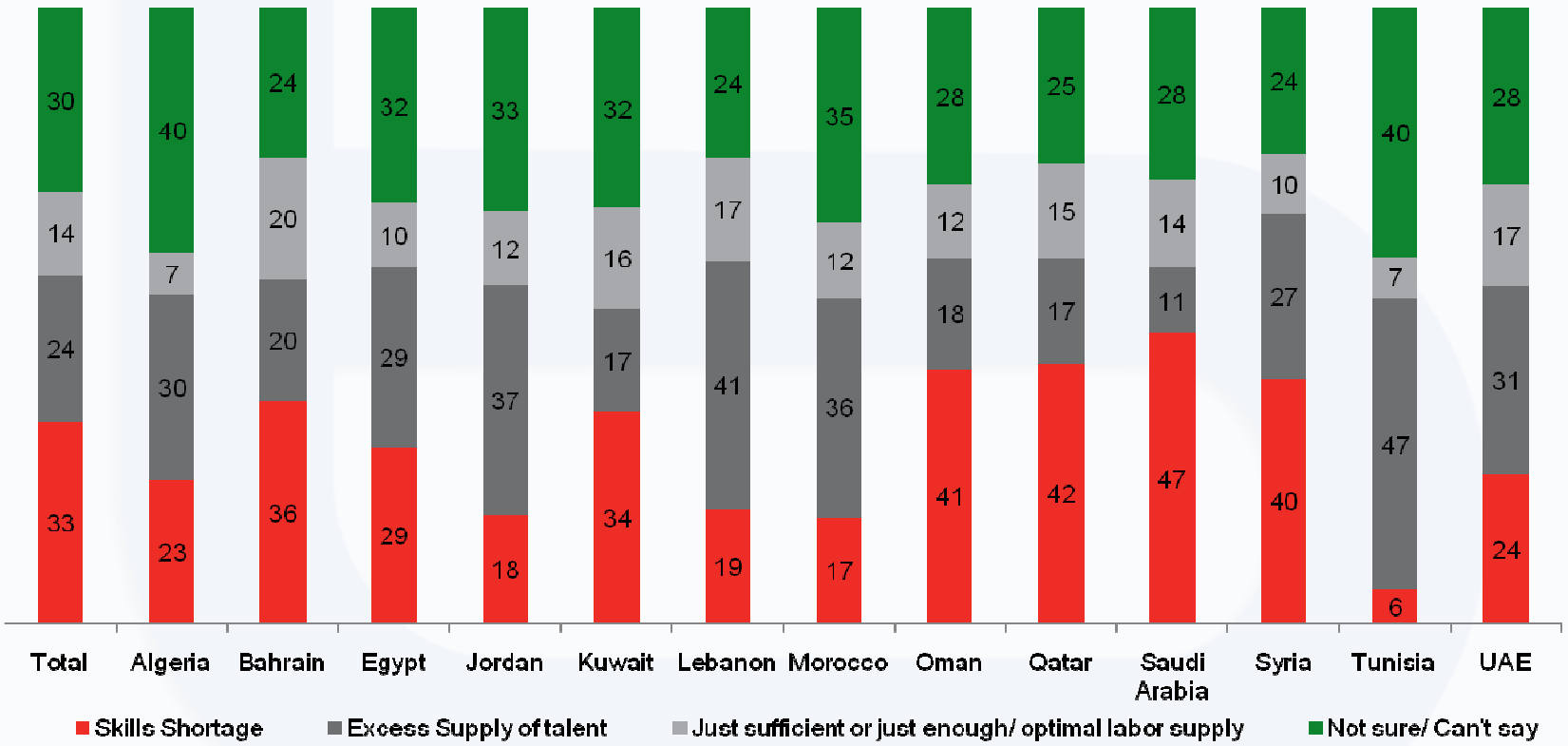


Q: Will quality of life considerations induce you to do any of the following in the next 12 months?

Base: Total (10,699), Algeria (129), Bahrain (116), Egypt (2082), Jordan (708), Kuwait (500), Lebanon (313), Morocco (452), Oman (116), Qatar (289), KSA (3391), Syria (123), Tunisia (73), UAE (2225)

Skills/labour supply status in country of residence

Do you believe that in your country of residence there is a...



Base: Total (10,699), Algeria (129), Bahrain (116), Egypt (2082), Jordan (708), Kuwait (500), Lebanon (313), Morocco (452), Oman (116), Qatar (289), KSA (3391), Syria (123), Tunisia (73), UAE (2225)

Impact of Current Economic Situation

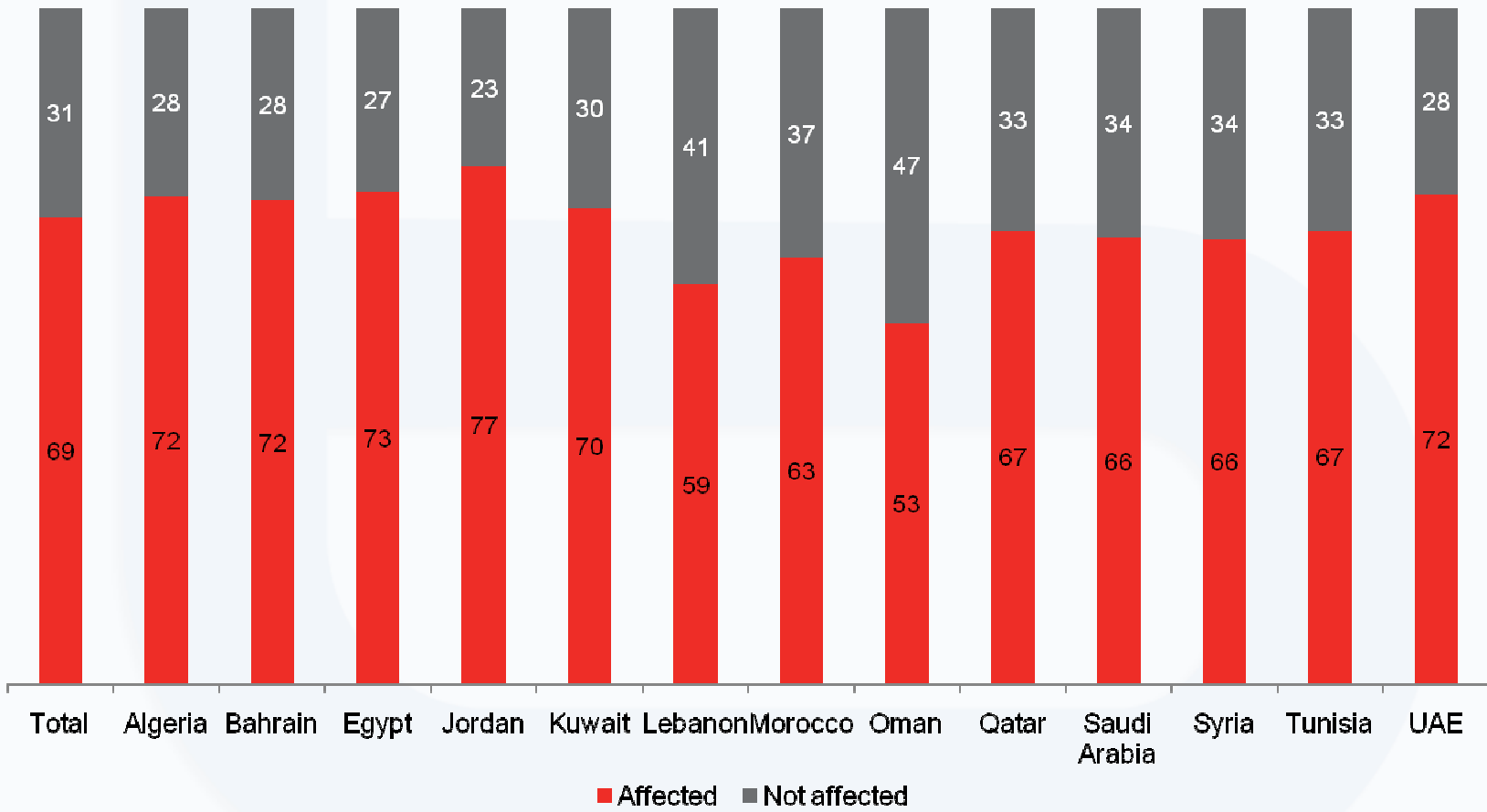
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Effect of company actions

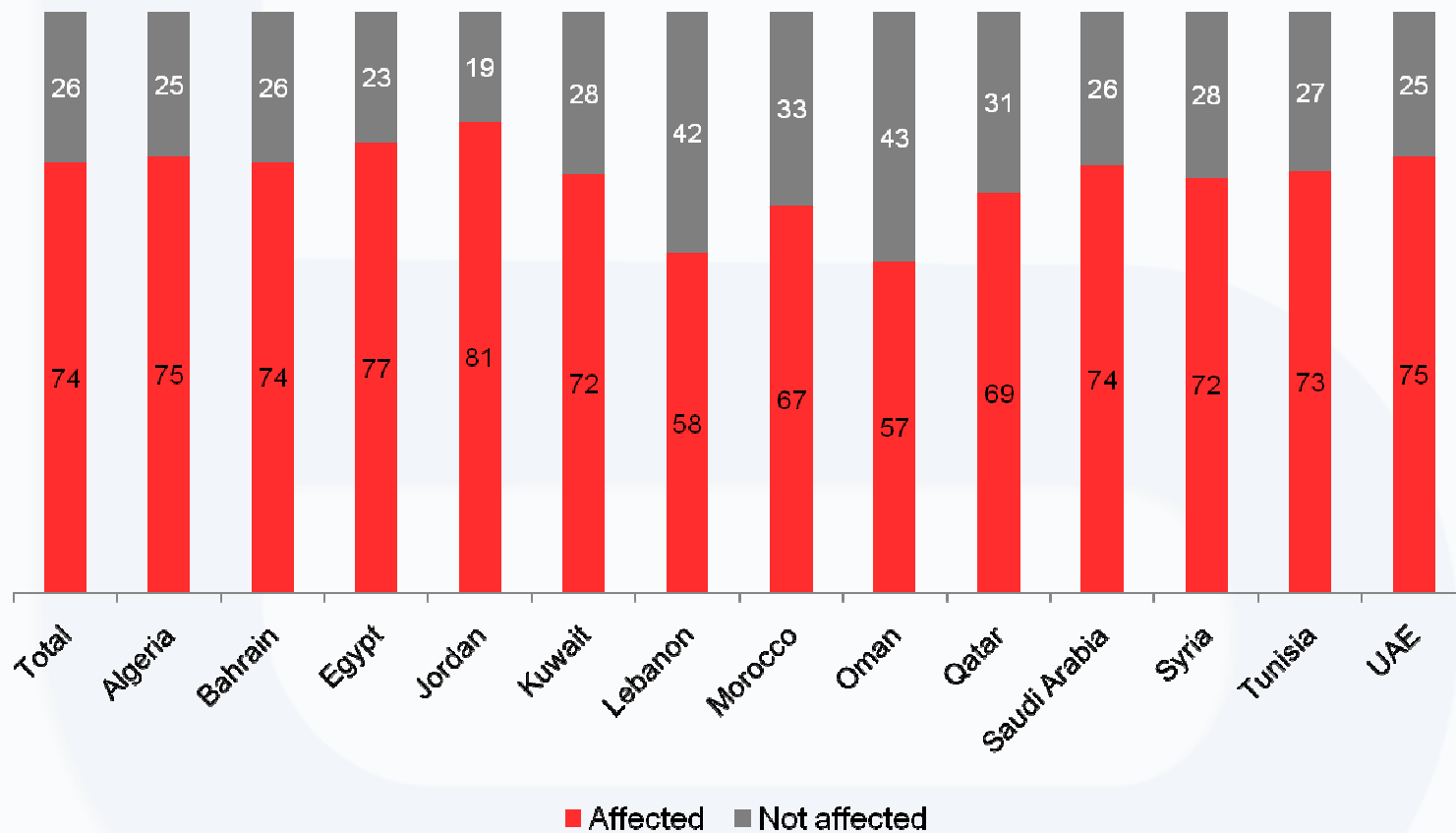
Were you/ are you still affected by the tight economic situation through company actions?



Base: Total (10,699), Algeria (129), Bahrain (116), Egypt (2082), Jordan (708), Kuwait (500), Lebanon (313), Morocco (452), Oman (116), Qatar (289), KSA (3391), Syria (123), Tunisia (73), UAE (2225)

Personal effect of the economic situation

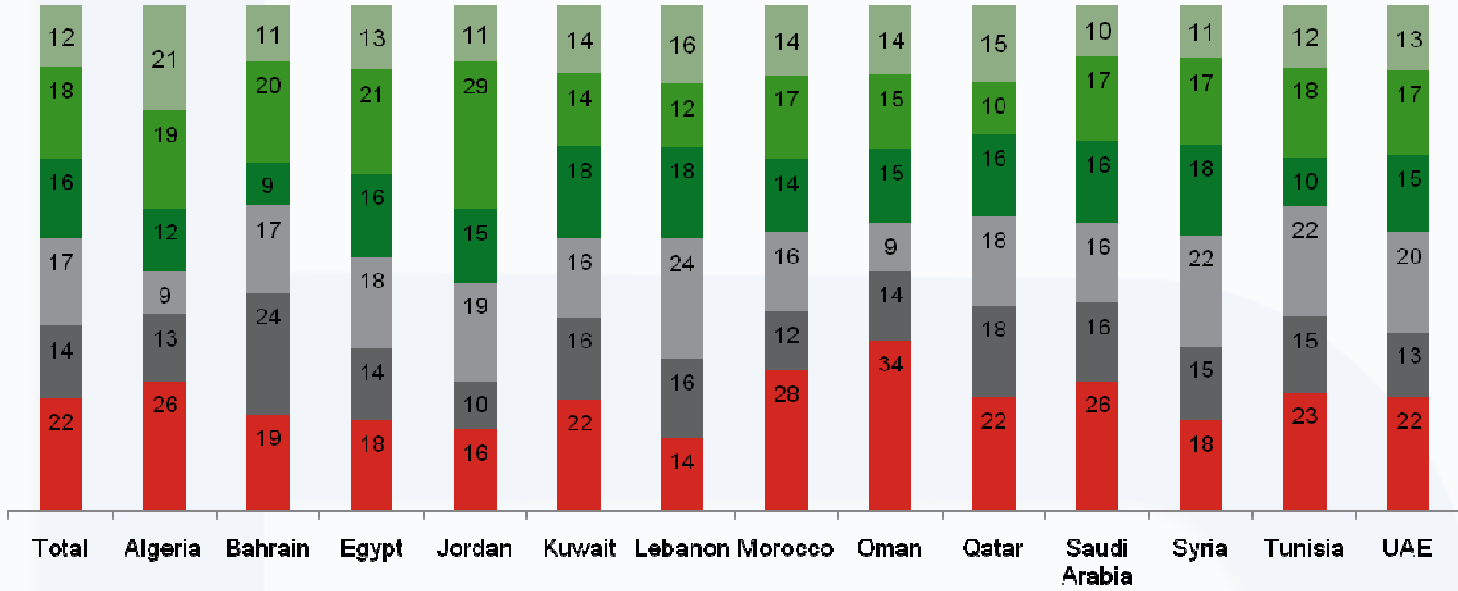
Were you / are you still personally affected by the economic situation?



Base: Total (10,699), Algeria (129), Bahrain (116), Egypt (2082), Jordan (708), Kuwait (500), Lebanon (313), Morocco (452), Oman (116), Qatar (289), KSA (3391), Syria (123), Tunisia (73), UAE (2225)

Feelings towards current climate

Which of the following best sums up your feelings towards the current climate in the job market? Select the one that best describes the way you feel.

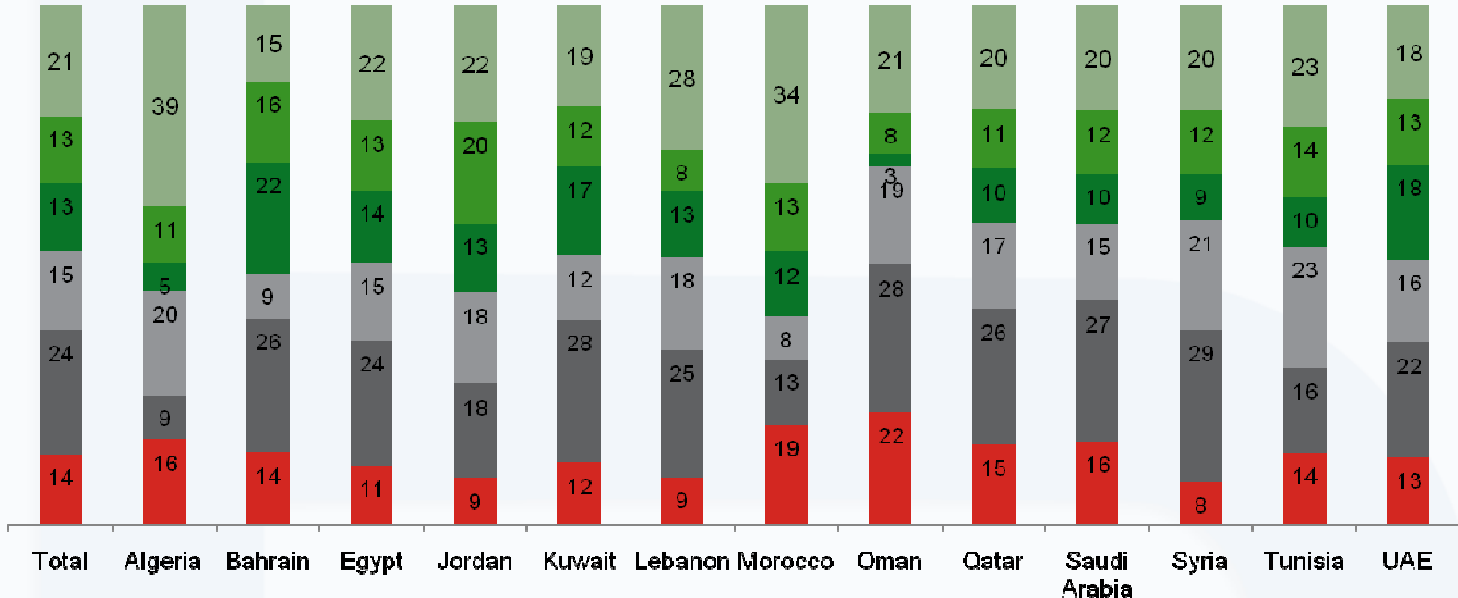


- I am very optimistic that there will still be robust economic growth and plenty of jobs available in my country next year
- I think salaries will continue to rise and the job market in my country will continue to be robust with strong demand for professionals
- I think that the job market in my country of residence will be even more competitive than today especially as high calibre talent who have lost jobs in other markets try to relocate to my country
- I think companies will continue to hire at the same pace and volume but salaries will decline across the board.
- I am quite pessimistic. I think there will be fewer jobs in the market than today and that salaries will also decline.
- Don't know/ None of the above.

Base: Total (10,699), Algeria (129), Bahrain (116), Egypt (2082), Jordan (708), Kuwait (500), Lebanon (313), Morocco (452), Oman (116), Qatar (289), KSA (3391), Syria (123), Tunisia (73), UAE (2225)

Effect of Global Trends

How do you feel global salary and unemployment trends will affect your country of residence? Select the one that best describes the way you feel.



- Salaries will continue to increase, the pace of hiring will be maintained at a very robust level and there will not be any lasting negative impact on local salary/employment trends
- Middle East salary and employment levels will not be affected beyond what we have already seen to date
- There will be a flight of talent to the Middle East which will cause salaries to decline as the number of top professionals increase
- There will be a little more downsizing and scaling back in hiring in the coming year and then my country's economy will quickly stabilize like the previous years
- There will be substantial firings and downsizings to come
- Don't know/ None of the above.

Base: Total (10,699), Algeria (129), Bahrain (116), Egypt (2082), Jordan (708), Kuwait (500), Lebanon (313), Morocco (452), Oman (116), Qatar (289), KSA (3391), Syria (123), Tunisia (73), UAE (2225)

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