

# EMPLOYEE MOTIVATION STUDY

September 2009

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## Objectives

- To understand how the current environment is impacting the satisfaction levels of an employee in the Middle East.
- Identification of the drivers that motivate an employee to stay longer in an organisation and what makes them refer their work place to others.
- To recognize what do employee's perceive of their immediate line manger in terms of organisational commitment, leadership skills, supportiveness etc.

## Demographic Background & Methodology

### Age and Gender:

Adult males and females  
Aged 21+ years

### Nationalities:

GCC Arabs, North Africans, Levant, Western Expats, Asians & Others

### Country of Residence

GCC: UAE, KSA, Kuwait, Oman, Qatar, Bahrain  
Levant: Lebanon, Syria, Jordan  
North Africa: Egypt, Morocco, Algeria, Tunisia  
Subcontinent: Pakistan\*  
\*low sample

### Methodology:

Online data collection was done between the 3<sup>rd</sup> to 17<sup>th</sup> August 2009. The total number of respondents achieved was 13,376.

Note: Kindly note all comments made on slides that have scaled questions have taken top 2 boxes into consideration.

# RESPONDENT PROFILE

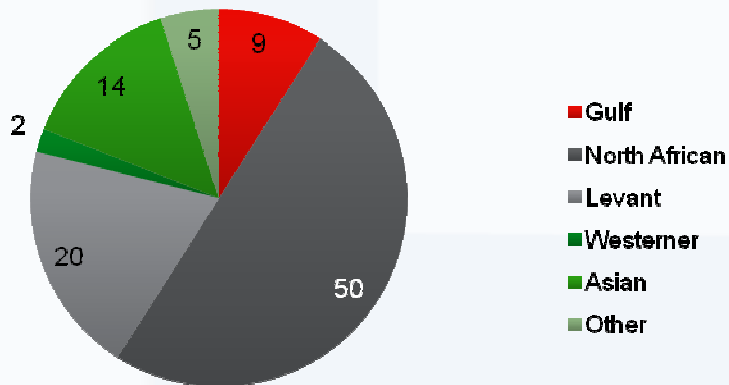
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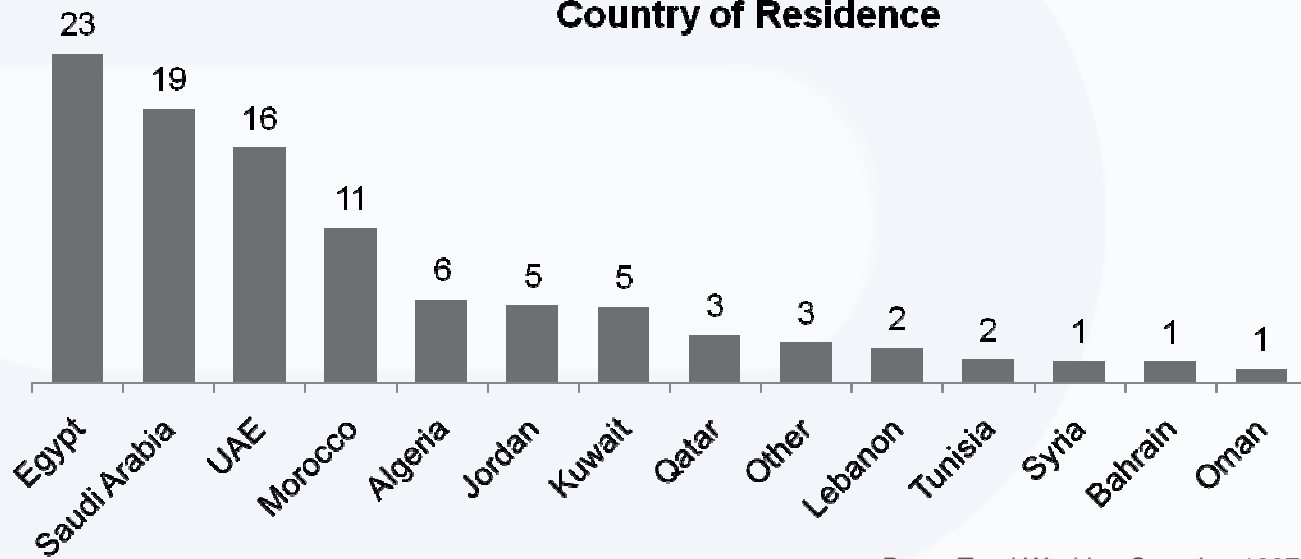
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**Respondent Profile – Country**

**Nationality**

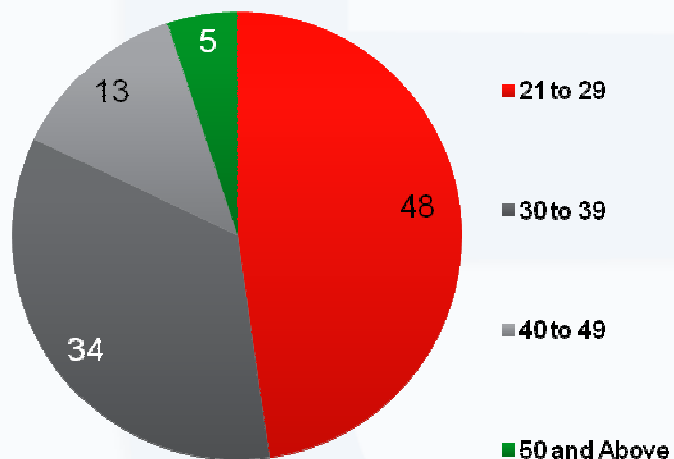


**Country of Residence**

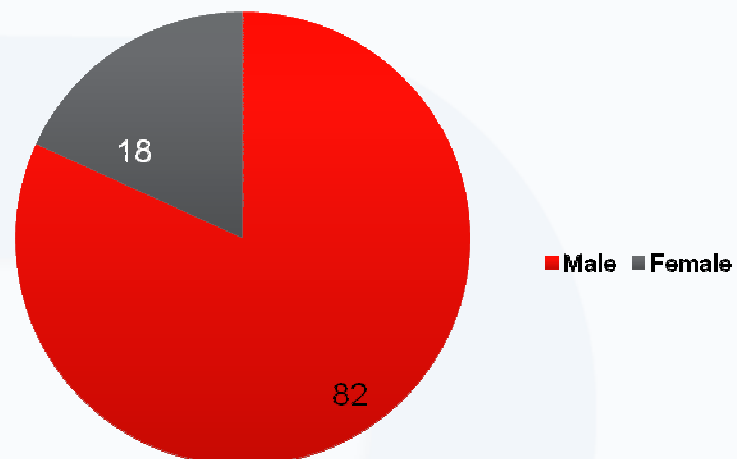


**Respondent Profile - Personal**

**Age**

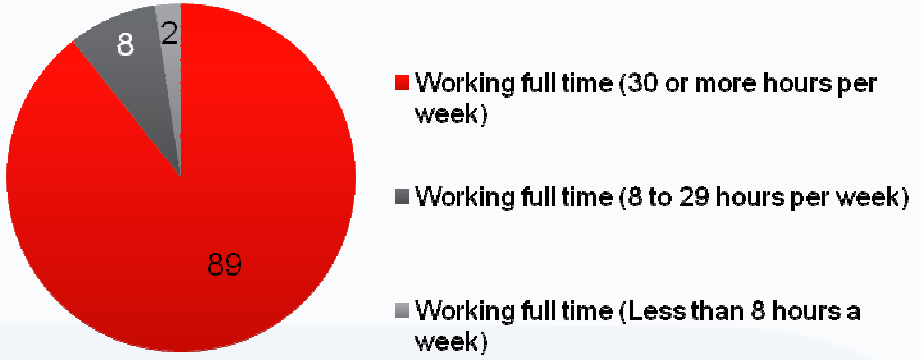


**Gender**

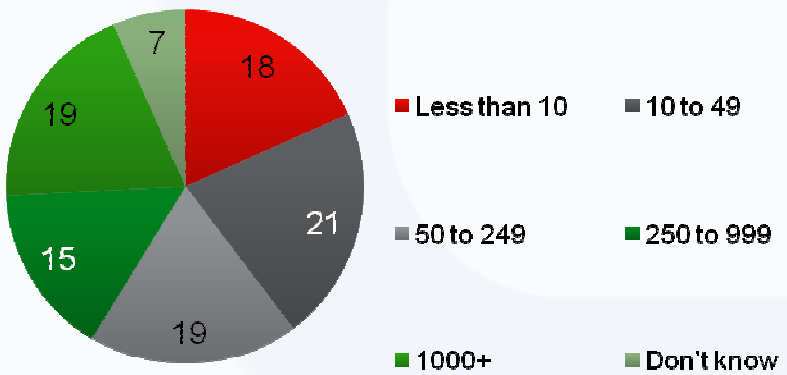


**Respondent Profile - Professional**

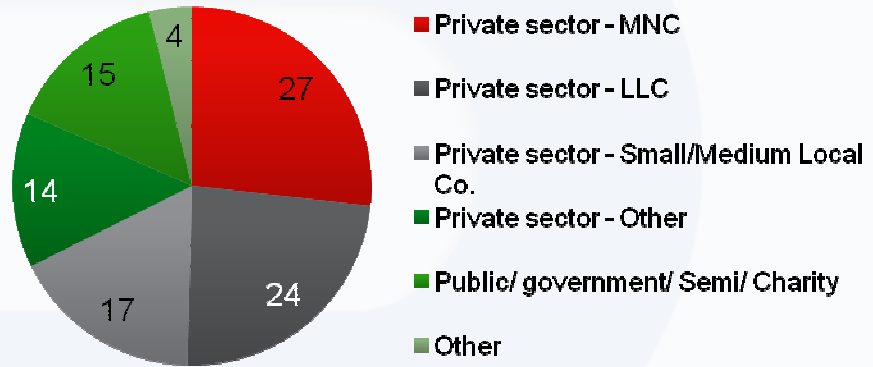
**Working Status**



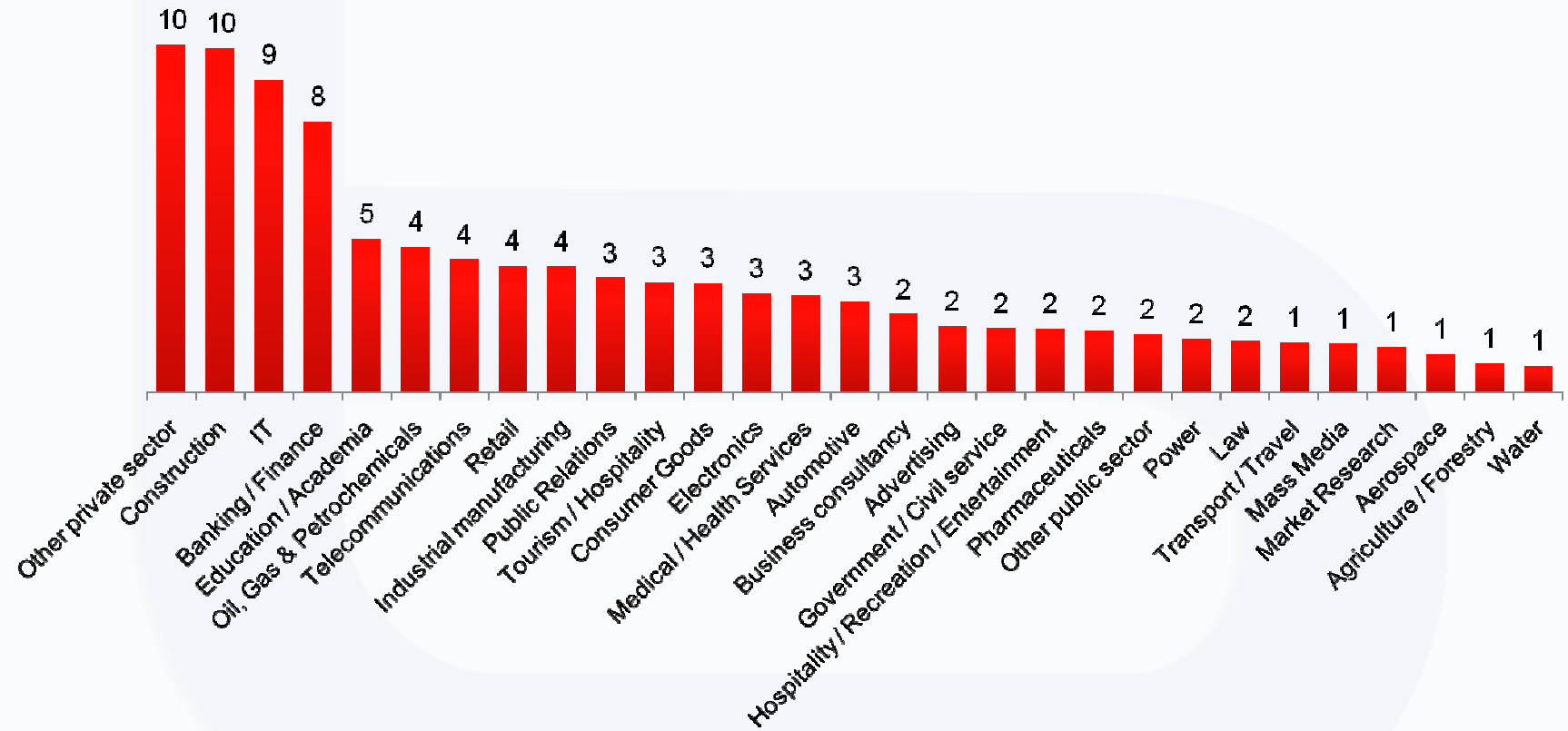
**No. of Employees**



**Sector**



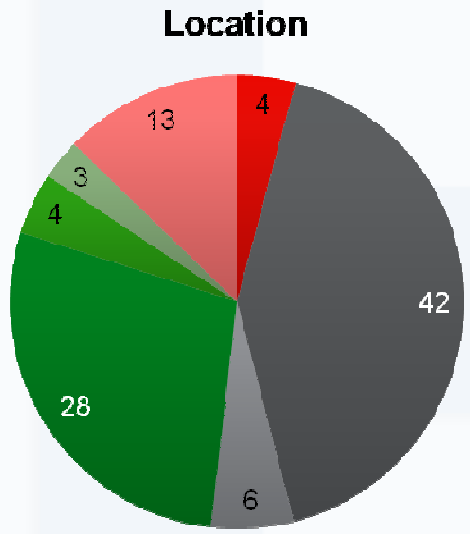
**Respondent Profile - Professional**



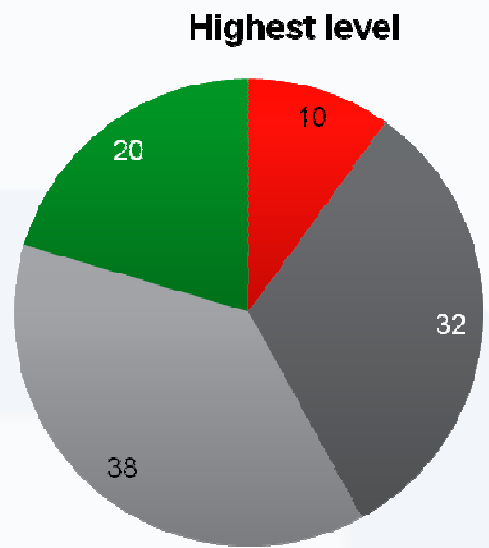


**Location of Work & Highest Level Attained**

Is the site/ location you work at...?  
Can you tell me which of the following best describes the level you have attained so far within your career path?



- An office at home
- An office NCT at home
- A shop/ retail environment
- Other fixed location
- An outdoor location/ series of locations
- Mobile (e.g. driving)
- Other



- I am at the senior most level I can achieve within my career
- I am at a fairly senior level but not at the top yet
- I am at midway in terms of my seniority
- These are still early days in my career and I have some way

# FINDINGS

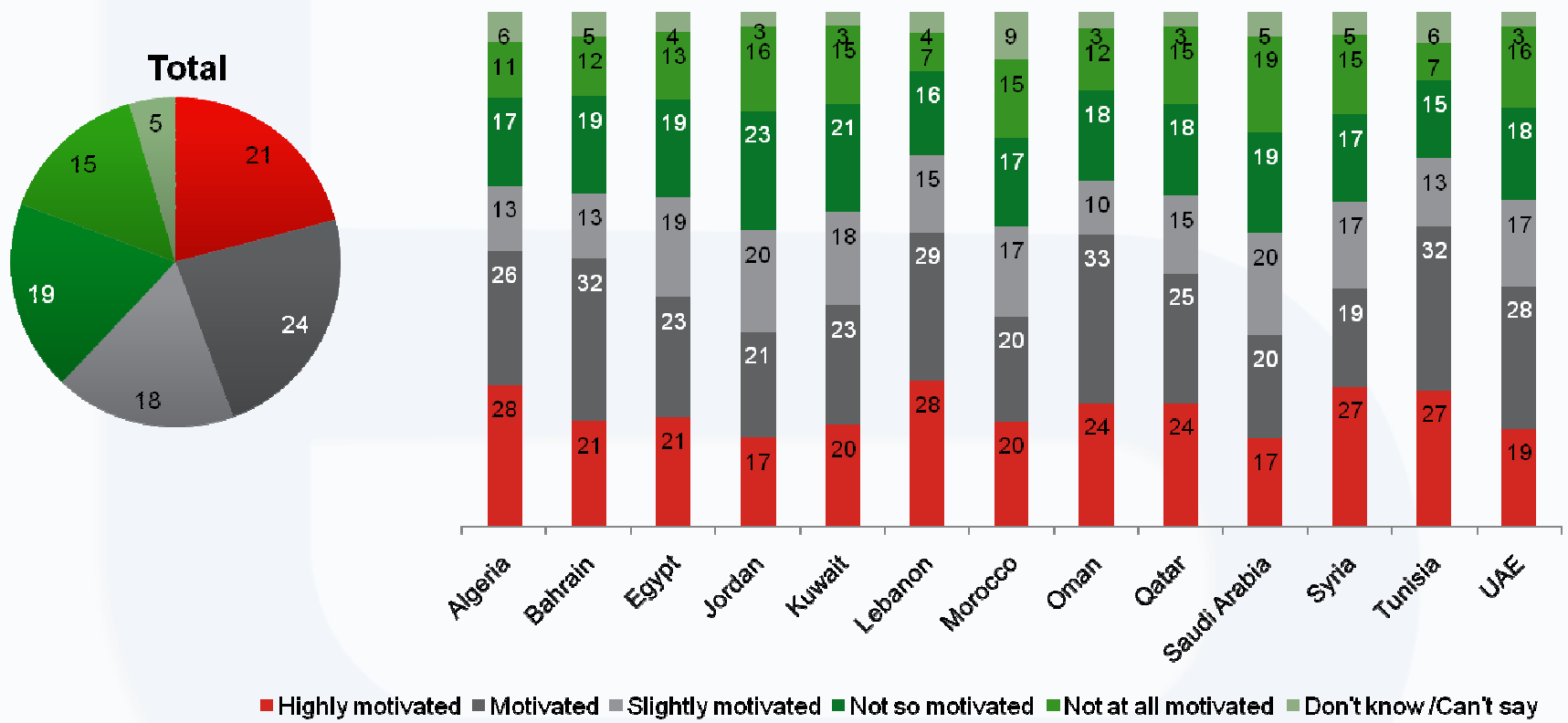
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**Motivation at Work**

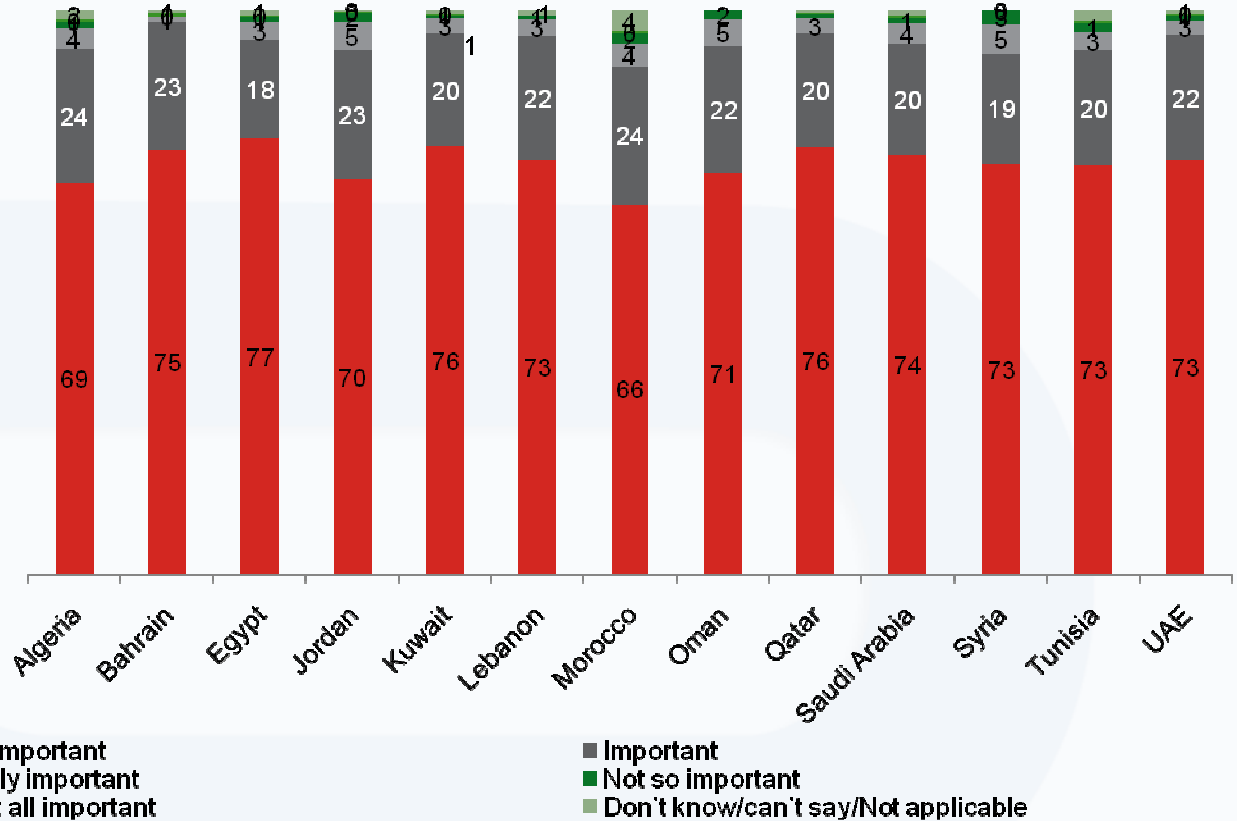
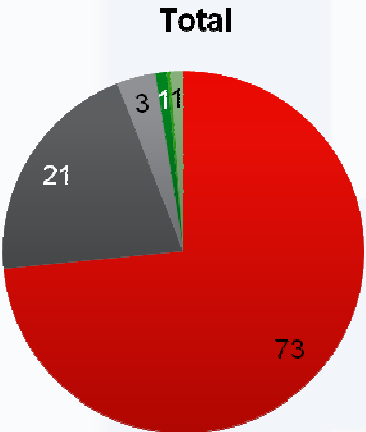
Across countries 45% of all respondents claim being motivated to work. Tunisia followed by Lebanon and Oman exhibit significant 'above average' level of motivation.



How motivated do you feel doing the work that you do every day for your organisation?

**Work-Life Balance**

Achieving a good work-life balance is one of the key factors that could impact an employee's motivation levels at workplace. 91% of the total respondents claim it is important.

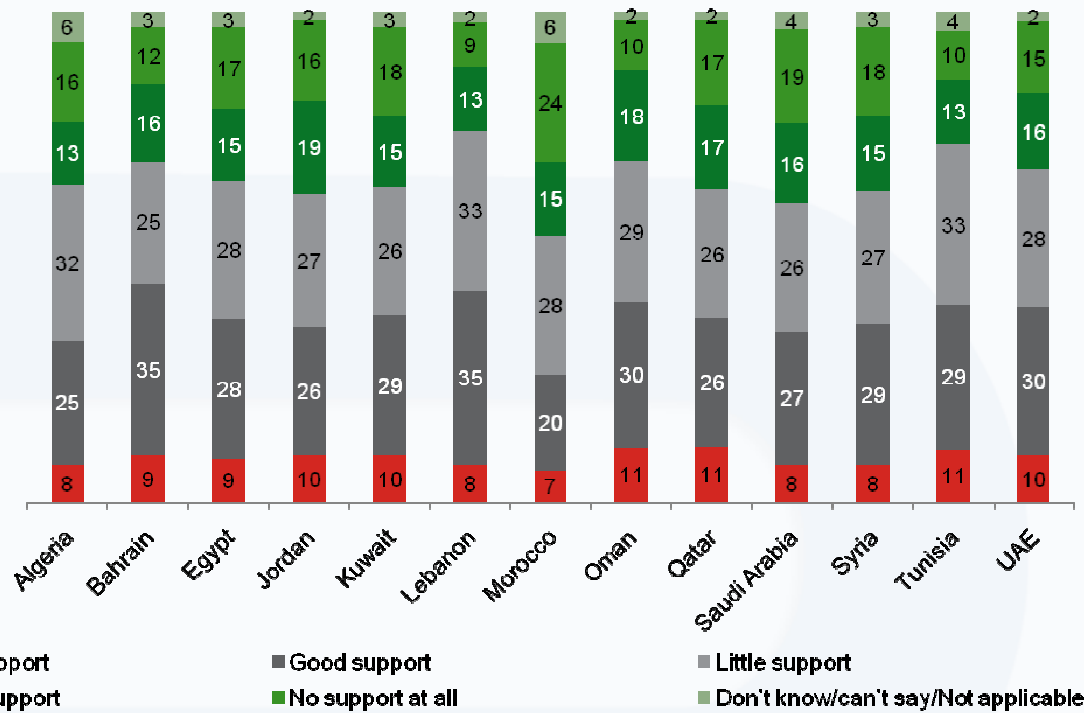
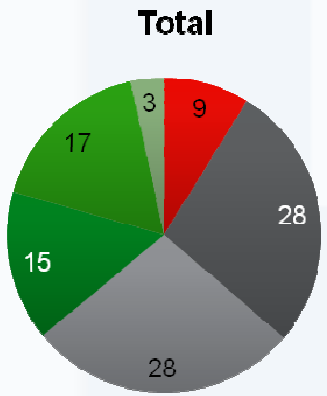


How important is achieving a good work-life balance for you to be motivated at work?

Base: Total Working Sample : 13376

**Organizational Support to Achieve Work-Life Balance**

More than 1/3<sup>rd</sup> the respondents opine that their organization supports achieve work-life balance. 76% of respondents in Lebanon receive support from their organization. 39% of respondents from Morocco feel they do receive good support.

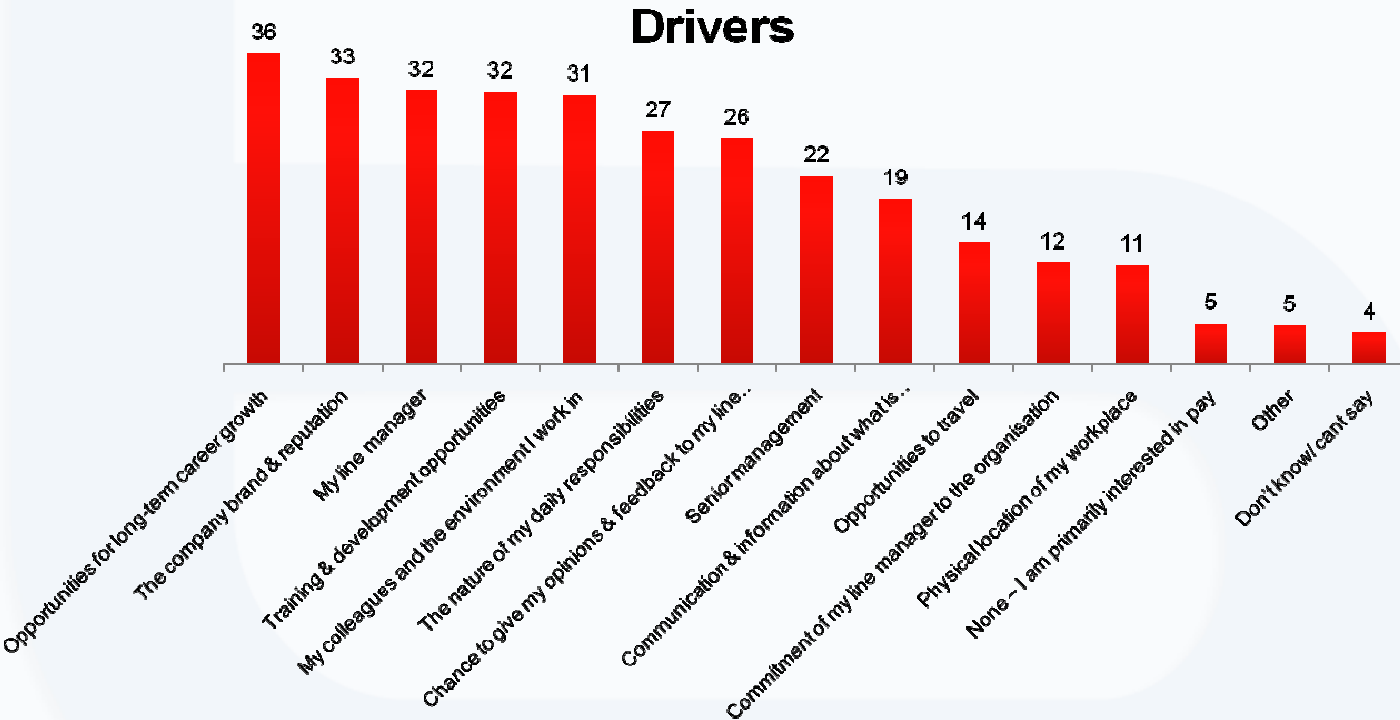


How much support does your current organisation offer to help achieve a good work-life balance?

**Motivation Drivers**

'Long-term growth opportunities' and 'company's reputation' come out to be the top motivating factors with 36% and 33% respectively.

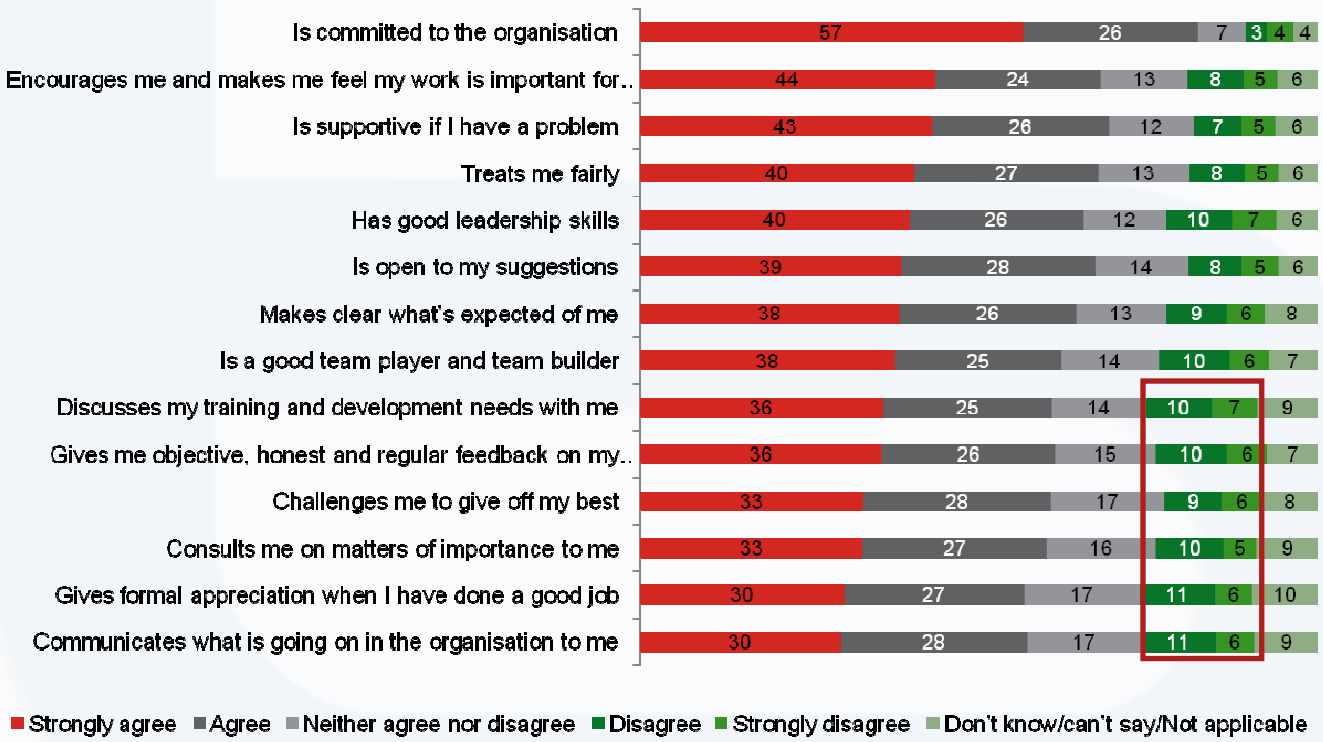
People are not only looking at 'monetary benefits' but a combination of motivators ('Only Pay' selected by a minority as a driver).



Which other variables most strongly drive your motivation levels for your work and your company besides pay?

**Image of Line Manager**

82% of respondents feel that their line manager is committed to the organization (high 57% strongly agree); but when it comes to the personal growth of the employee, the managers do not appear to be as involved in few cases (17% disagree that their managers provide formal appreciation of work done or communicate about what is going on in the organization).



To what extent do you agree or disagree with each of the following statements with regard to your line manager

## Recommendation to Others

'Private sector-MNC' have the highest chance (20% would recommend to others) of being recommended by the people they employ in comparison to any other sector.

	Total	Private sector – MNC (3583)	Private sector – LLC (3158)	Private sector - Small/Medium Local Co. (2301)	Private sector – Other (1872)	Public/ government/ Semi/ Charity (1947)	Other (514)
Strongly recommend	15	20	13	10	12	16	19
Recommend	28	33	30	20	24	27	29
Recommend slightly	31	27	33	36	29	30	23
Ask to avoid	12	9	12	16	13	11	7
Strongly ask to avoid	9	7	8	13	11	9	4
Don't know/can't say/Not applicable	6	4	4	6	11	8	18

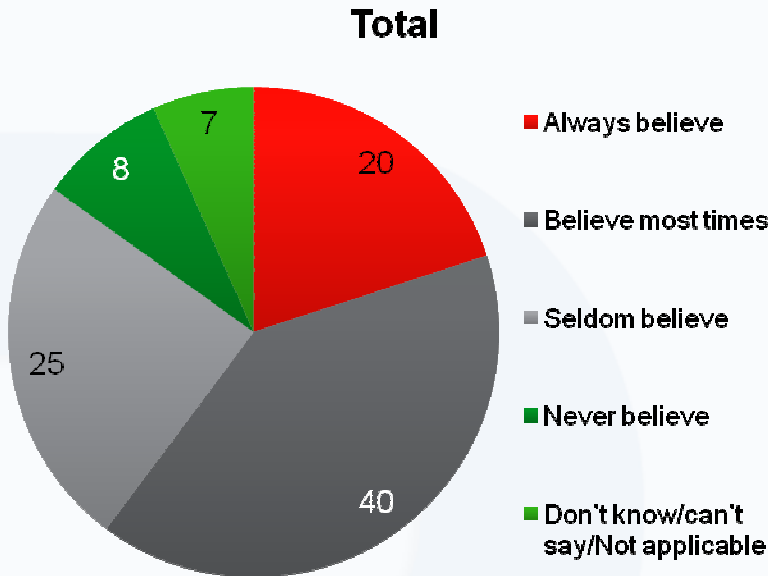
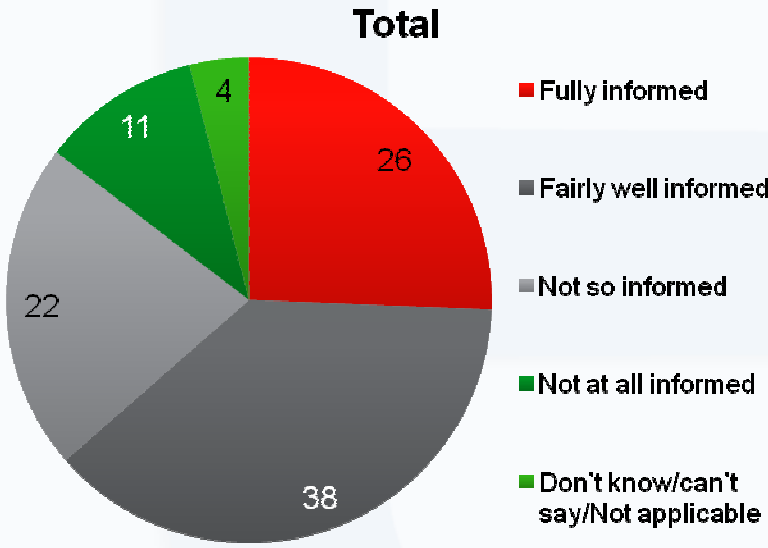
How strongly would you recommend your organisation as an employer to your friends, peers and ex colleagues?

Base: Total Working Sample : 13376



**Internal Communications**

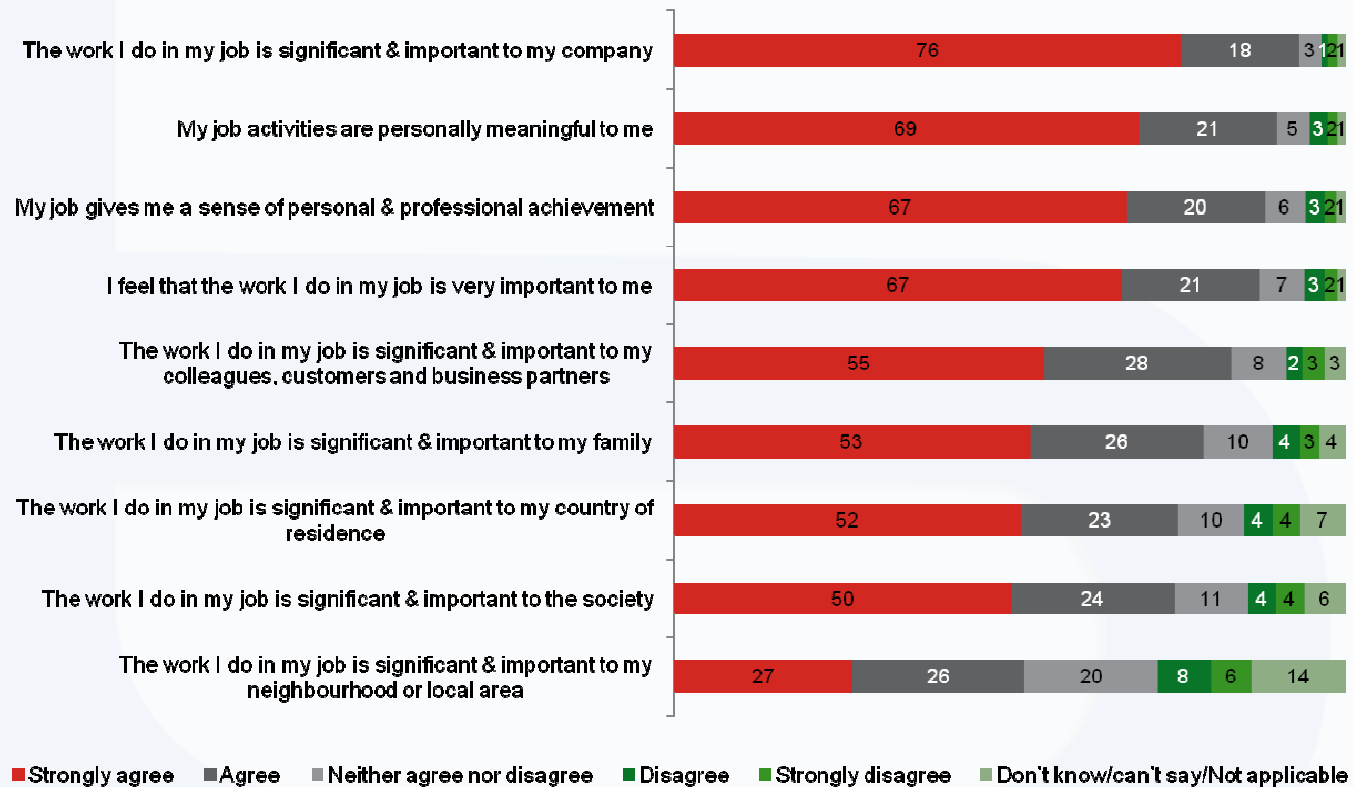
Internal communication is one of the elements that has been well looked upon as 64% of the respondents claim they are well informed of their company's goals.  
60% also claim that they believe the information communicated to them formally.



Q. How informed are you about your company's short term and long term goals as well as recent plans and developments?  
Q. To what extent do you believe the information your company formally communicates to you regarding internal plans and developments?

## Personal Attitude Towards Work - Overall

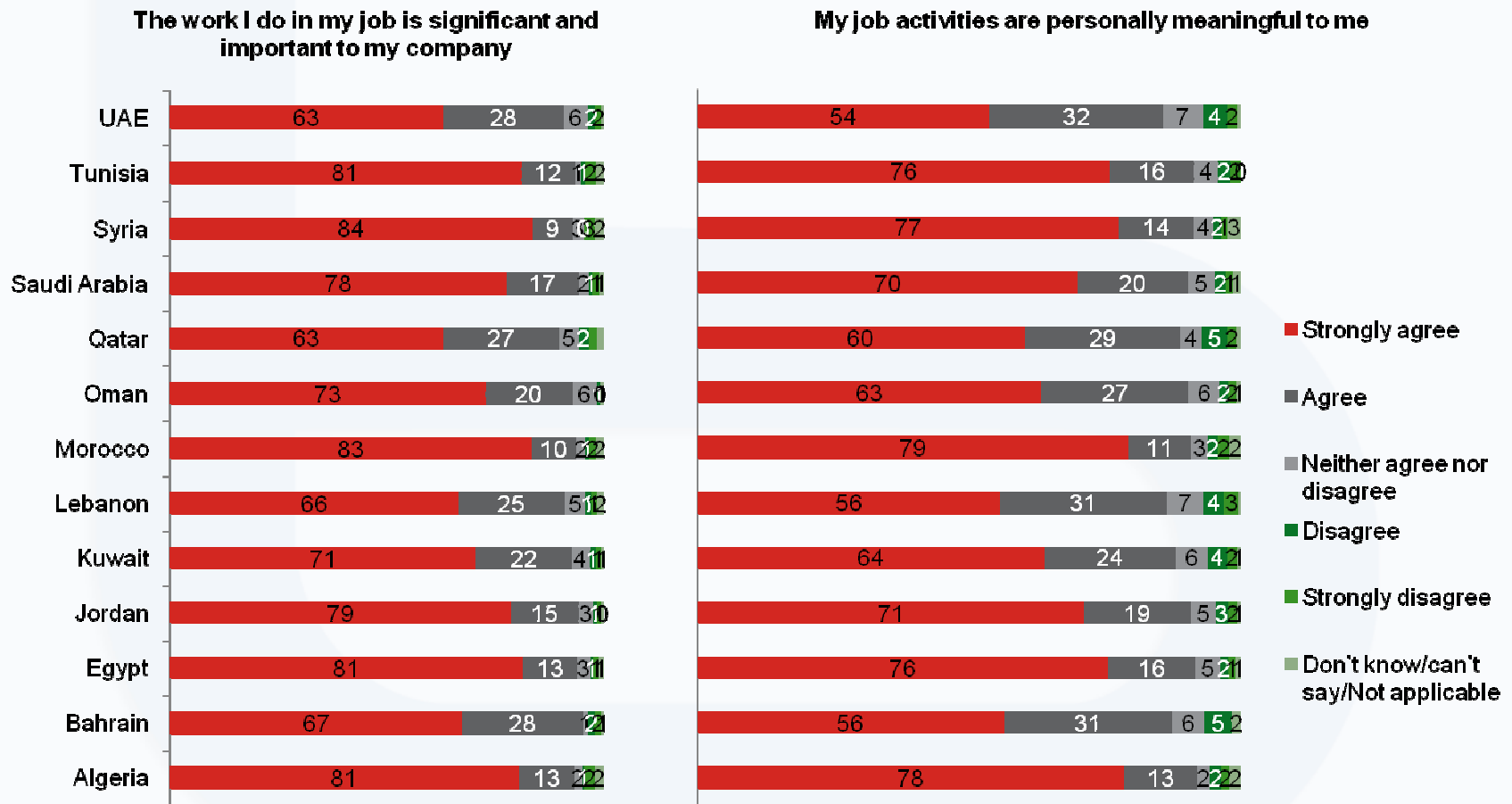
A high majority (94%) of the respondents feel that the work they do is significant to the company and 87% claim that their work gives them sense of achievement.



We will now ask you a few questions on your personal opinion and attitude towards the work you do. Please indicate to what extent do you agree or disagree with each of the following statements

**Personal Attitude Towards Work**

A job's 'significance to the company' and 'personal meaningfulness' is high across all countries.

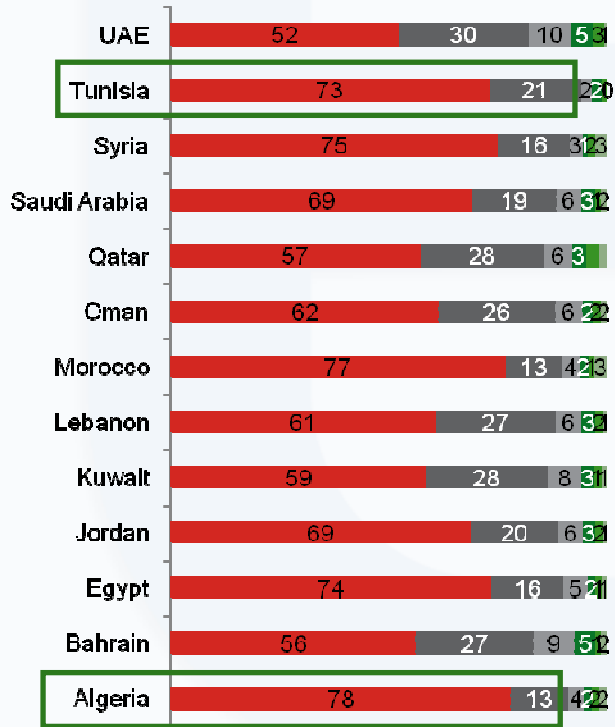


**Personal Attitude Towards Work**

Algeria along with Tunisia is amongst the highest where 91% & 94% of respondents feel their job gives them a sense of personal & professional achievement.

Algeria (92%) followed by Egypt & KSA (88% each) are where respondents feel that the work they do in their job is very important for them

**My job gives me a sense of personal and professional achievement**



**I feel that the work I do in my job is very important to me**



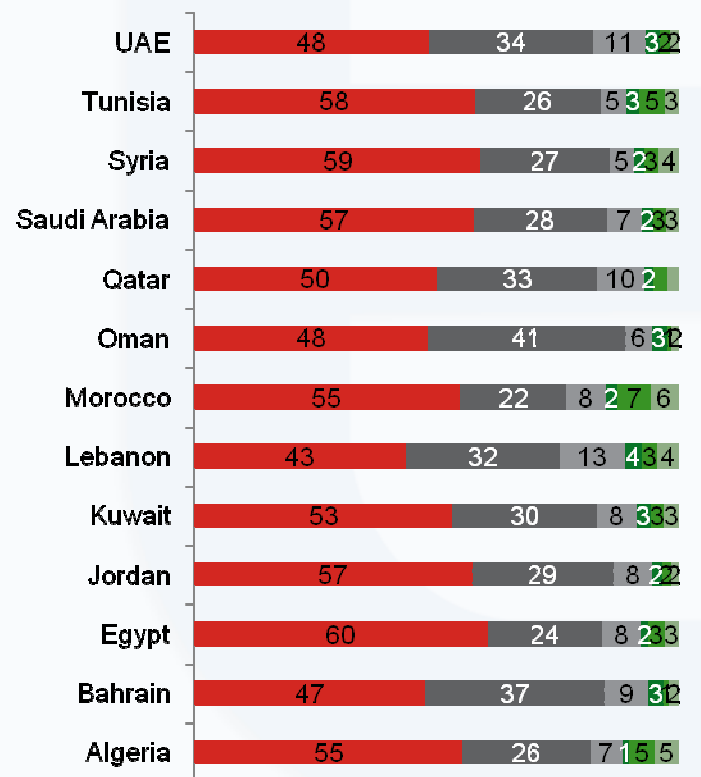
- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree
- Don't know/can't say/Not applicable

**Personal Attitude Towards Work**

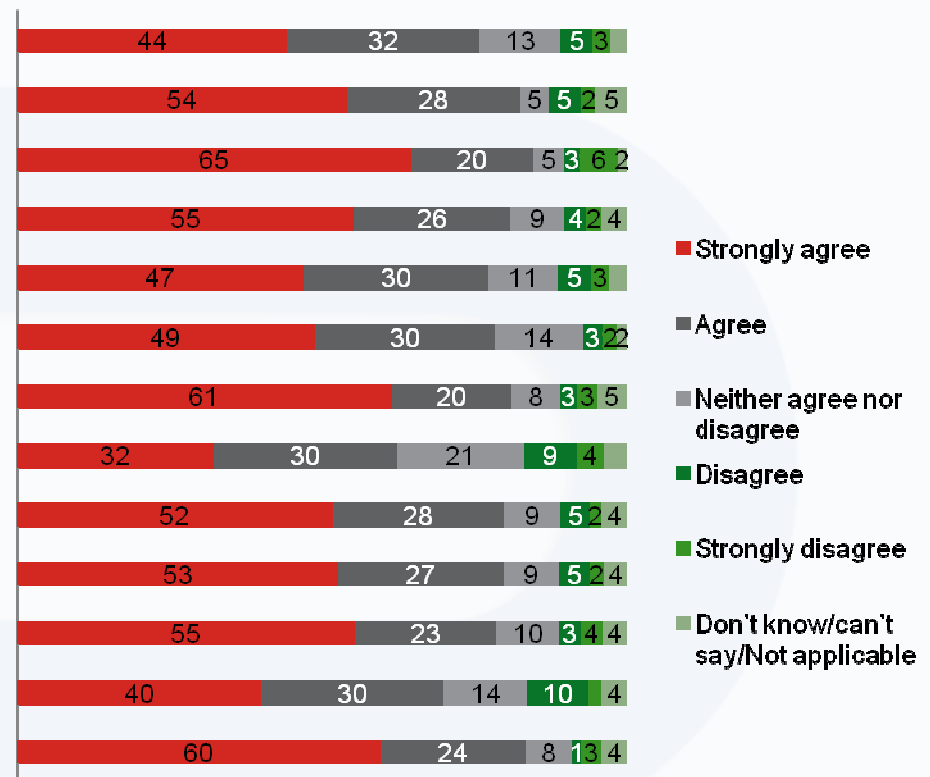
Jordan (86%) followed by Egypt(84%) are where respondents say the work they do in their job is significant & important to their colleagues, customers and business partners.

Only 62% of respondents in Lebanon feel that the work they do in their job is significant and important to their families.

**The work I do in my job is significant and important to my colleagues, customers and business partners**



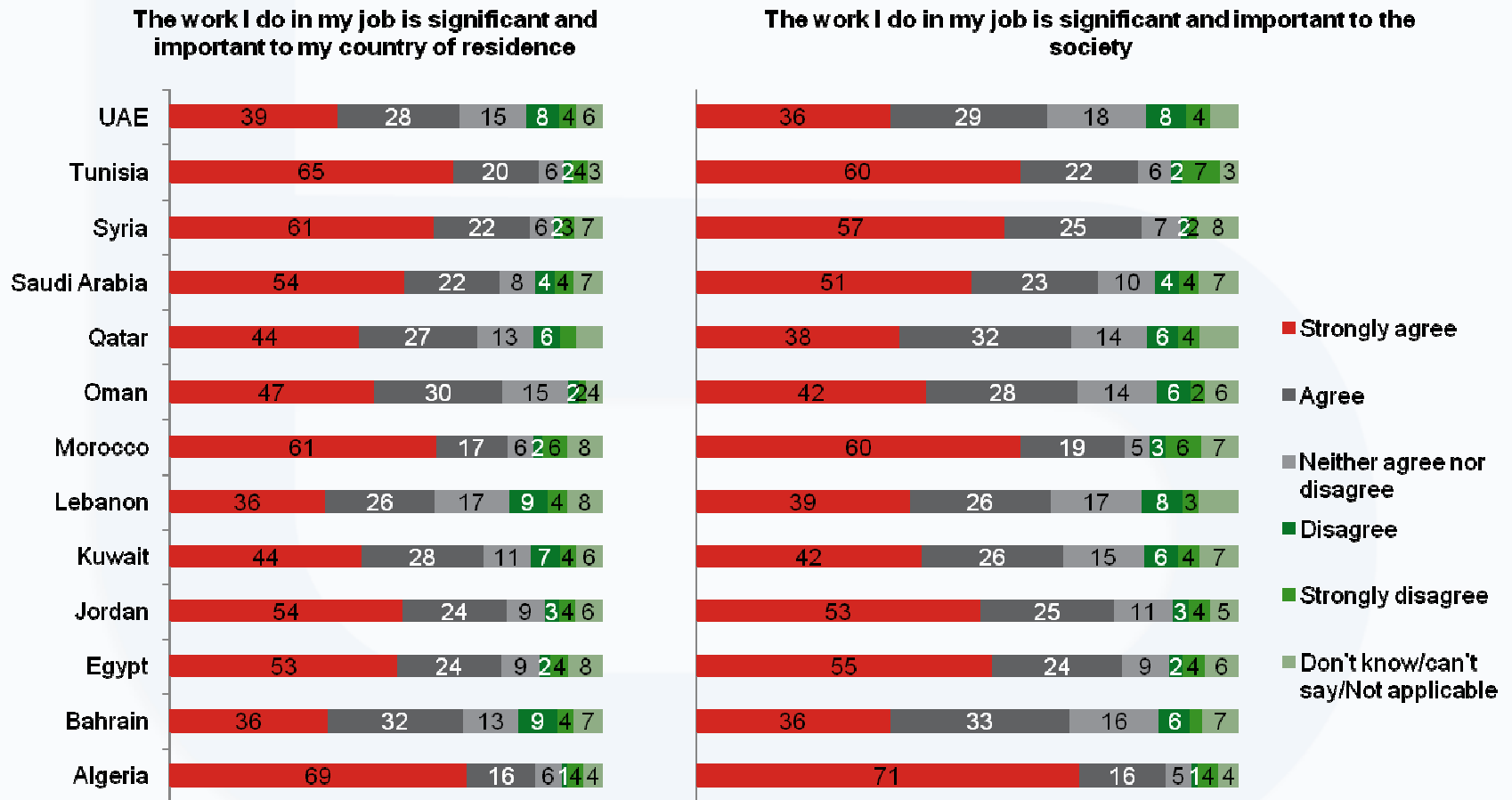
**The work I do in my job is significant and important to my family**



- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree
- Don't know/can't say/Not applicable

## Personal Attitude Towards Work

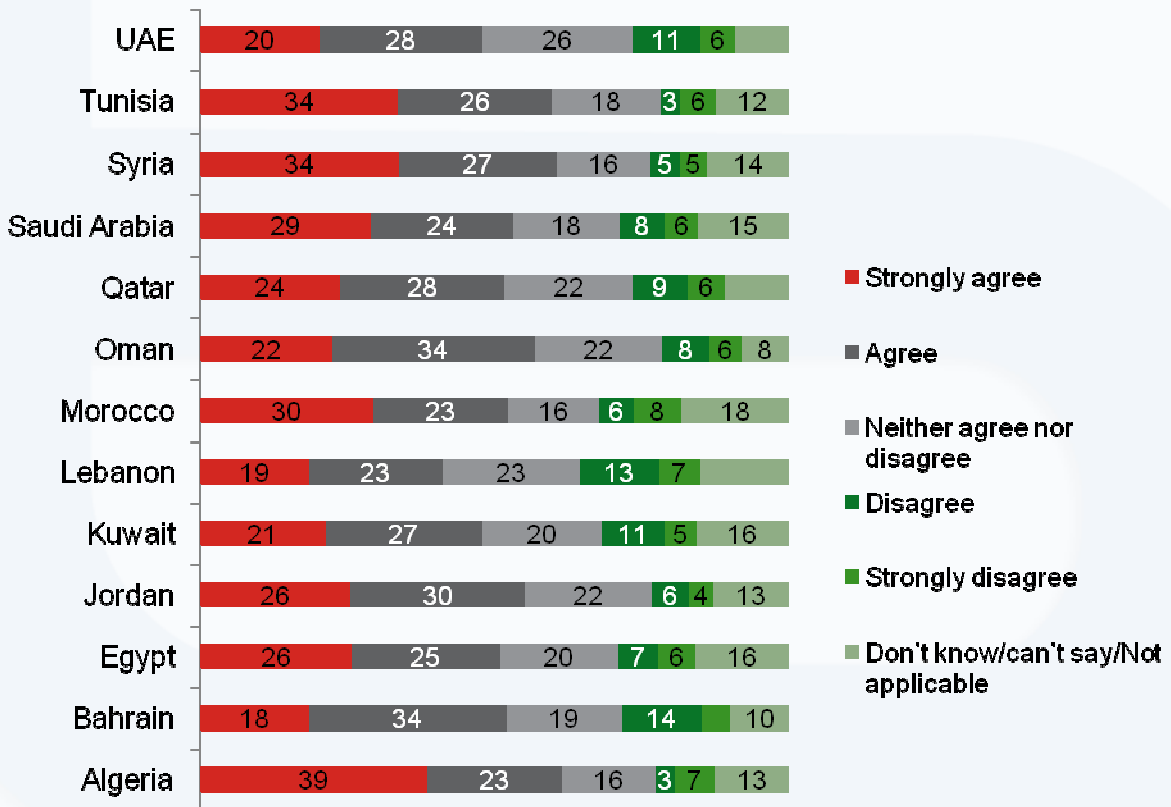
67% of respondents from UAE and 62% from Lebanon feel that their job is significant to the country of their residence.  
87% of respondents from Algeria and 82% from Tunisia feel their job to be significant to the society.



**Personal Attitude Towards Work**

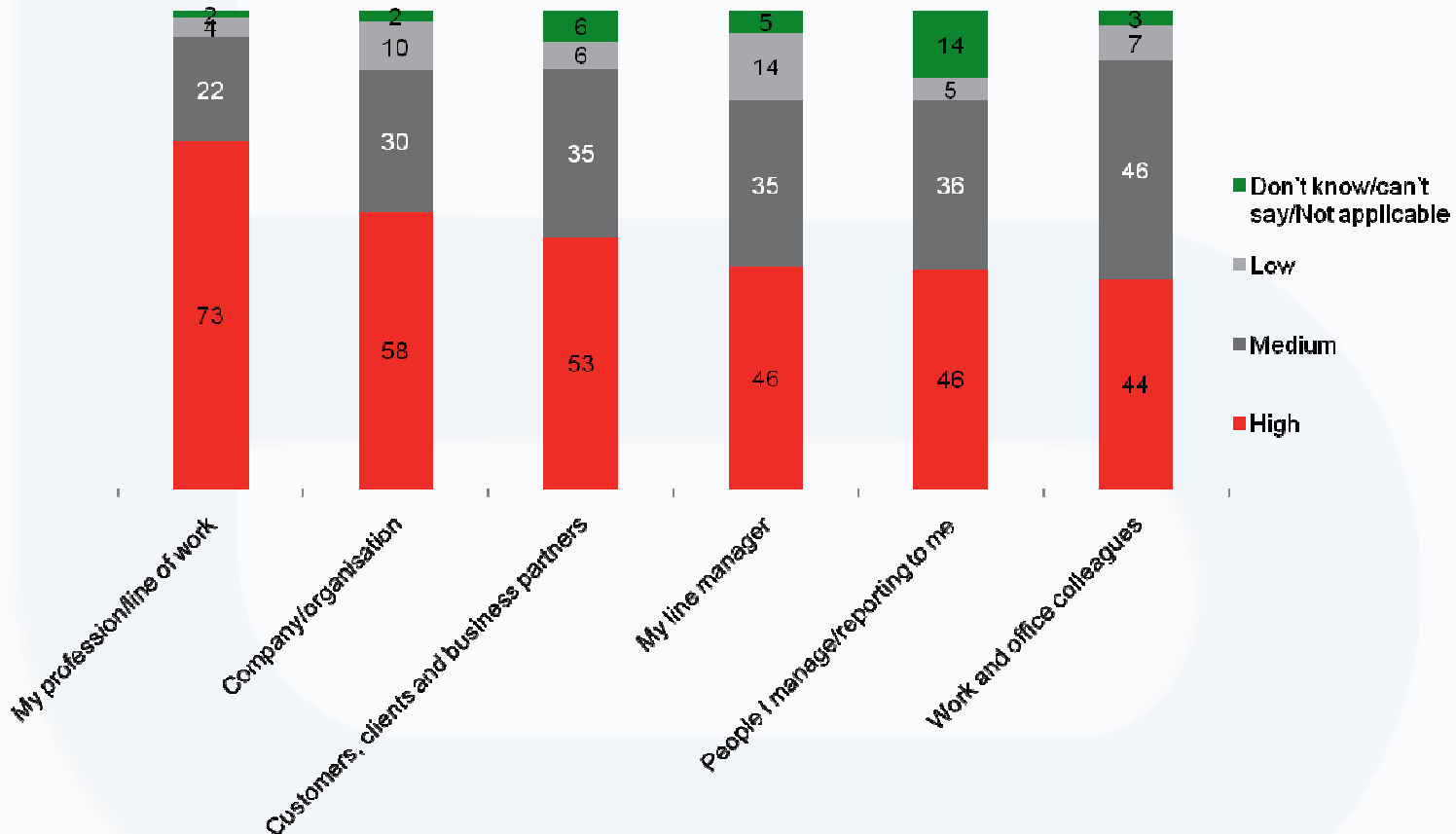
69% of respondents in Algeria agree that their job is significant and important to their neighborhood or local .Only 48% feel the same in UAE.

**The work I do in my job is significant and important to my neighborhood or local area**



**Feeling of Loyalty**

Although high levels of loyalty are exhibited across work groups, if looked individually, only one's 'profession/line of work' commands highest level of loyalty.



Please indicate the extent of loyalty you feel to each of the following work related groups



**Satisfaction with Work & Organisation - Overall**

Although respondents claim being satisfied with their responsibilities and authority to work as well as the work environment, about two in five respondents are not satisfied with the level of job security (career growth is the most important driver) as well as compensation and benefits received (well reflected by the 'motivation to work' at average of 45%)

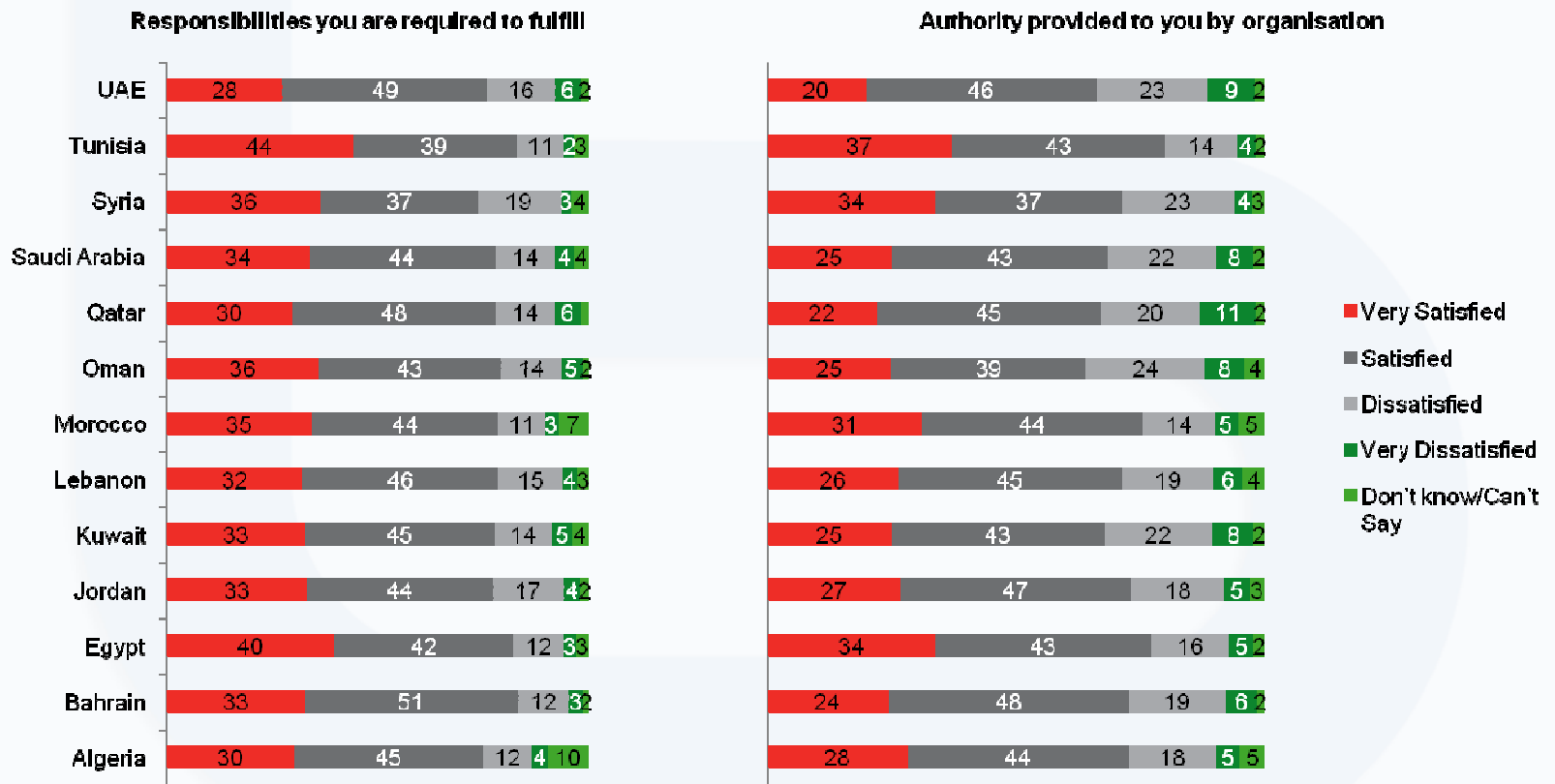


We will now ask you a few questions on your level of satisfaction with the work you do and your organization. Please indicate how satisfied you are with each of the following aspects

## Satisfaction with Work & Organisation

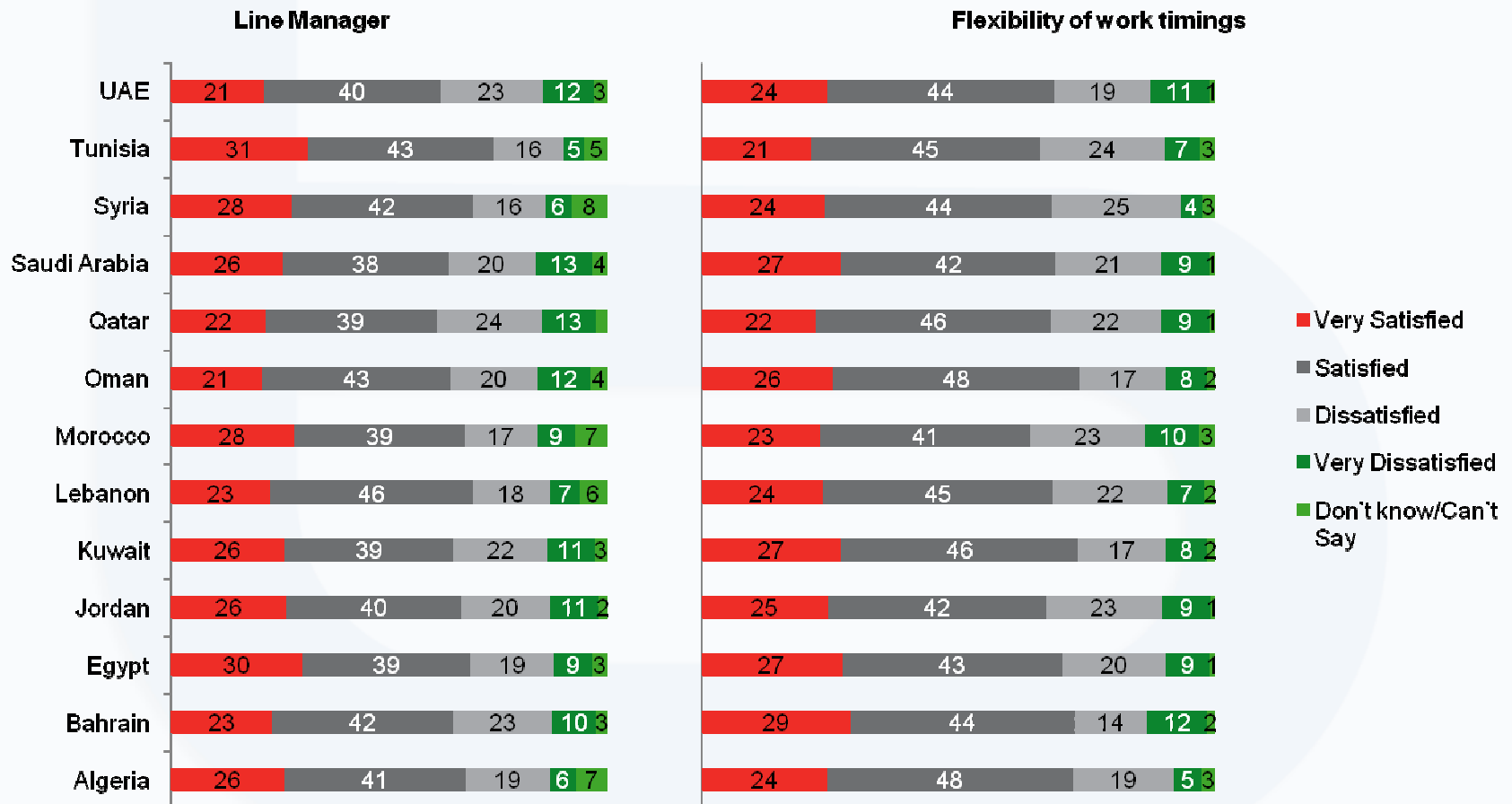
82% in Egypt claim to be satisfied with the responsibilities they are required to fulfill whereas 77% respondents in UAE are say the same.

In Tunisia (80%), the respondents are very satisfied with authority provided to them by their organisation



## Satisfaction with Work & Organisation

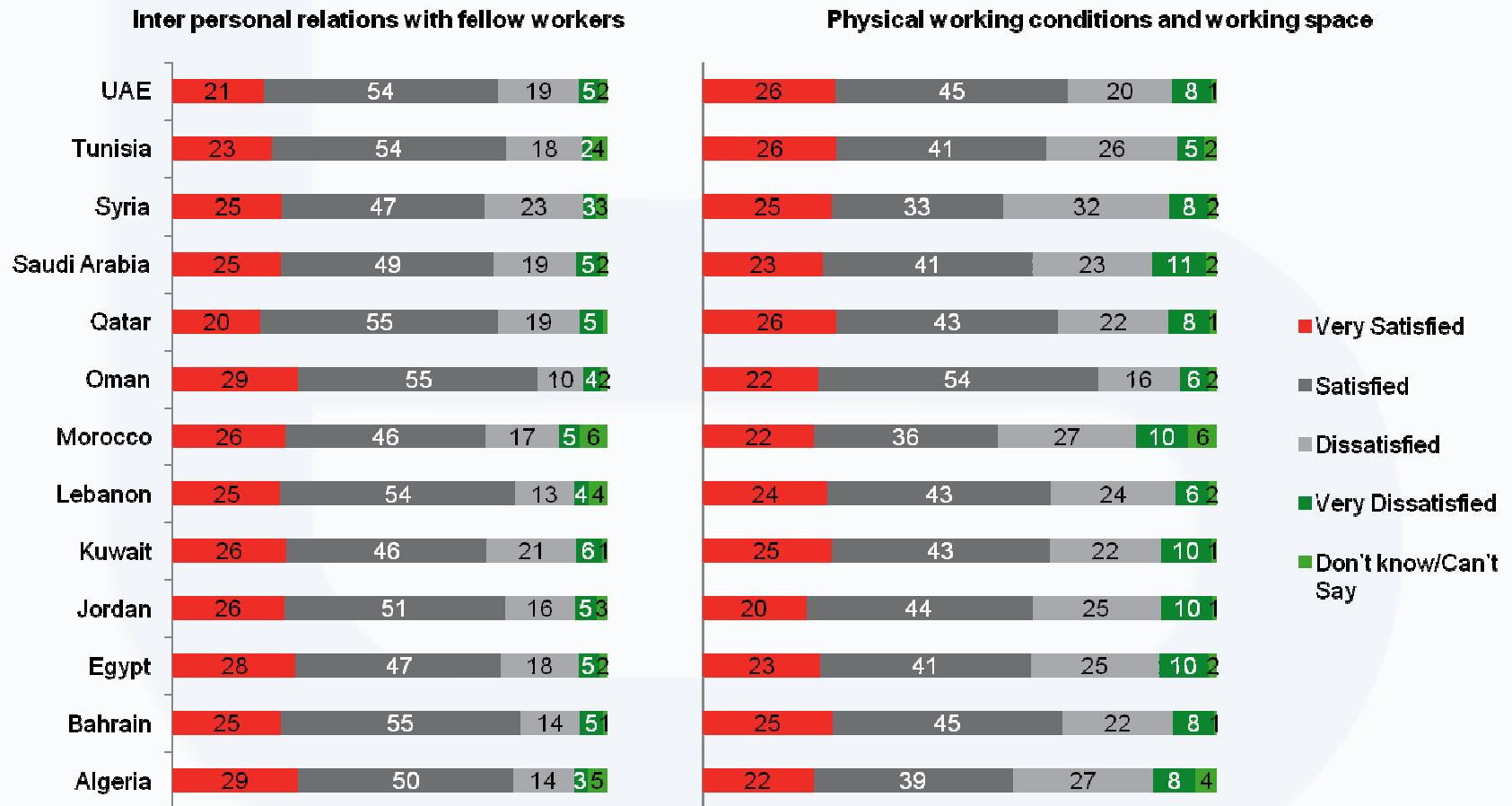
Respondents in Tunisia (74%) are satisfied with their Line Manager followed by Egypt (69%).  
'Flexibility of work timings' has similar levels of satisfaction throughout.



## Satisfaction with Work & Organisation

Satisfaction with inter personal relations with fellow works is highest in Oman (84%).

Satisfaction with physical working conditions and working space in most of the countries are good



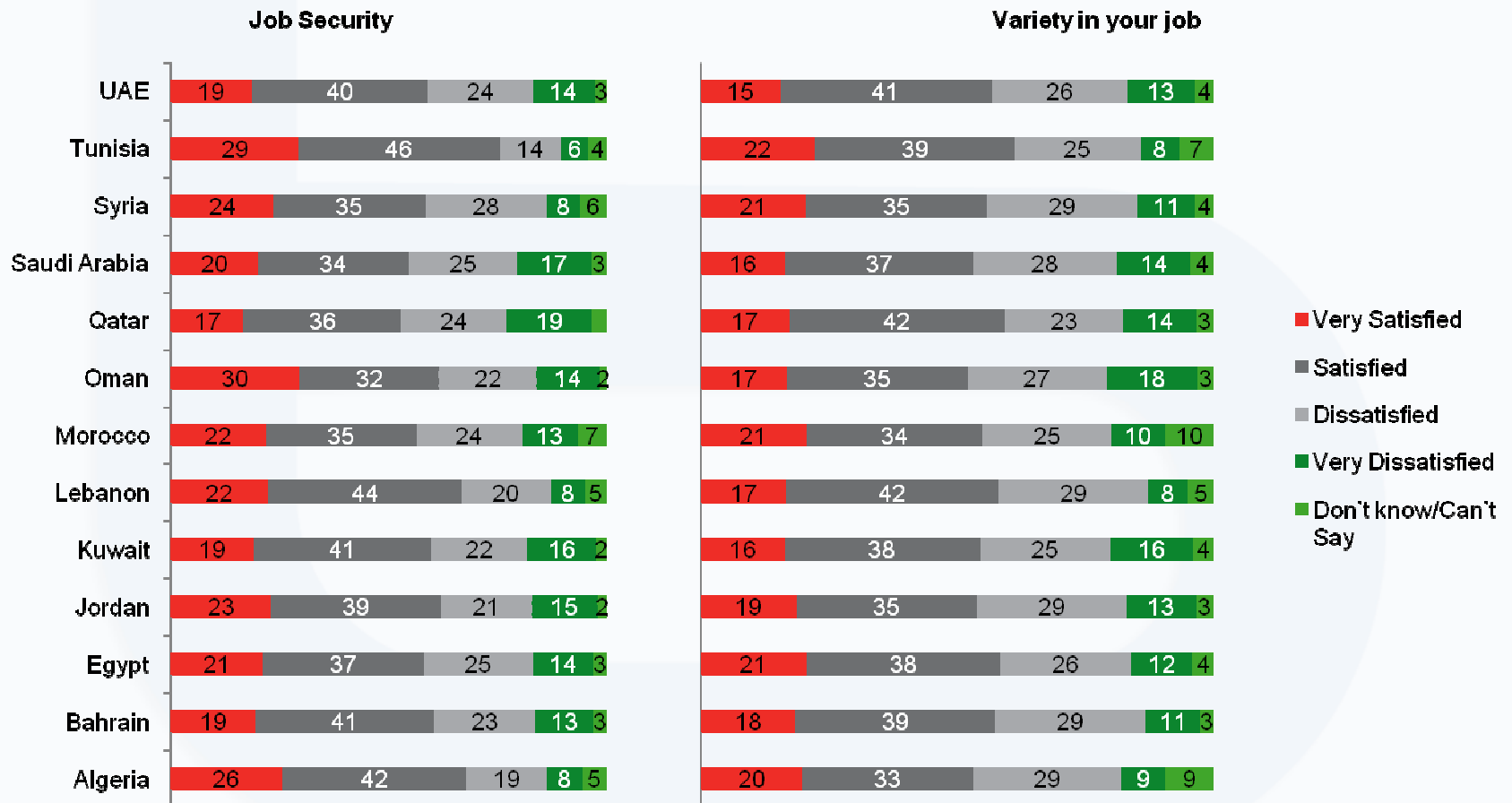
## Satisfaction with Work & Organisation

57% of respondents in UAE are satisfied with the opportunities they get to use their skills and abilities. 44% of the respondents in Bahrain are dissatisfied with the recognition and appreciation for good work in their organization.



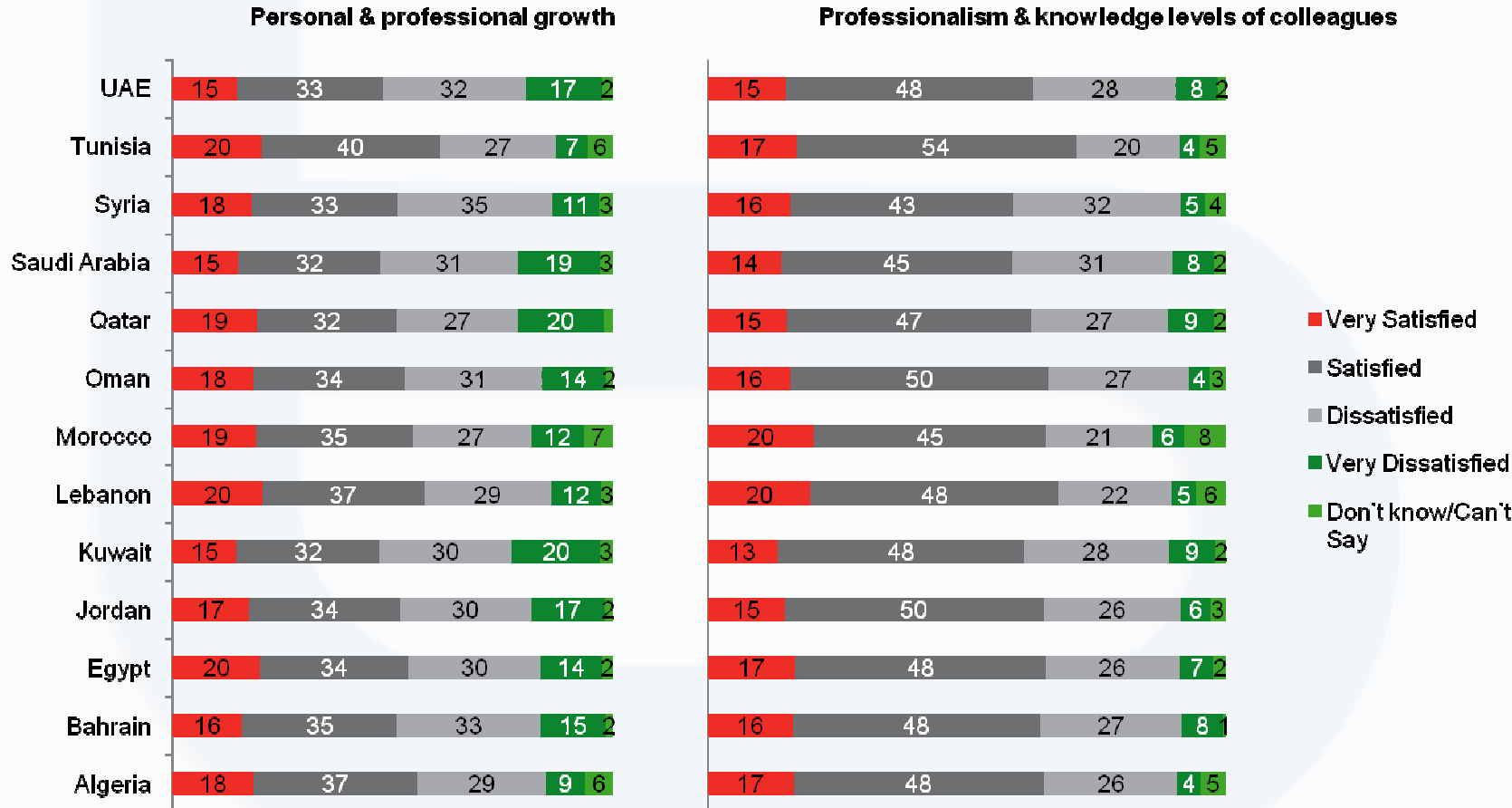
## Satisfaction with Work & Organisation

Oman (62%) of the respondents are satisfied with the job security in their organization. In Kuwait only (54%) respondents are satisfied with variety in their job within their organization.



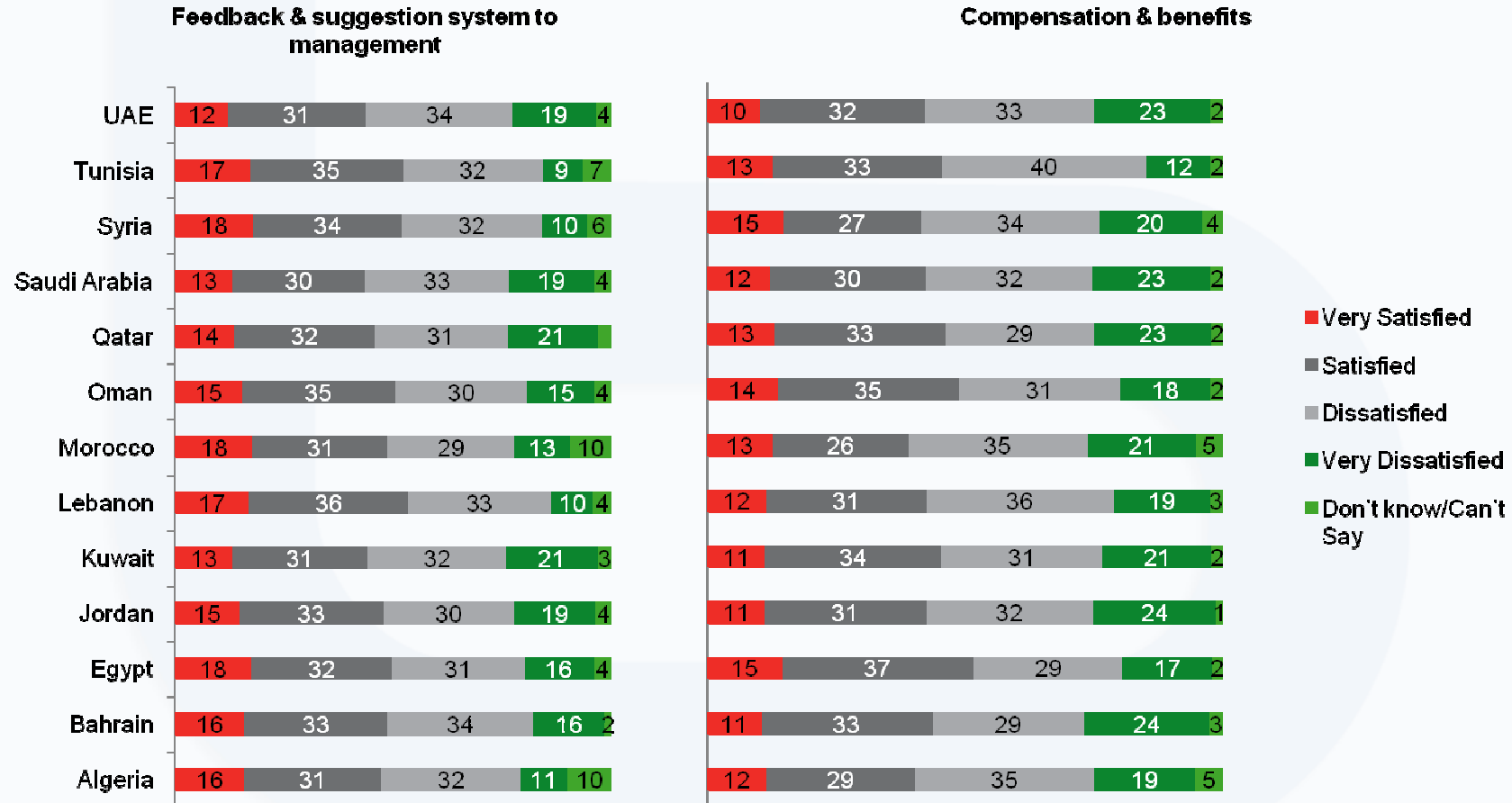
**Satisfaction with Work & Organisation**

60% of the respondents in Tunisia are satisfied with their personal & professional growth within their organization. In UAE, 49% of respondents are dissatisfied with their personal and professional growth. KSA (59%) & Oman (66%), respondents are with professionalism and knowledge levels of colleagues



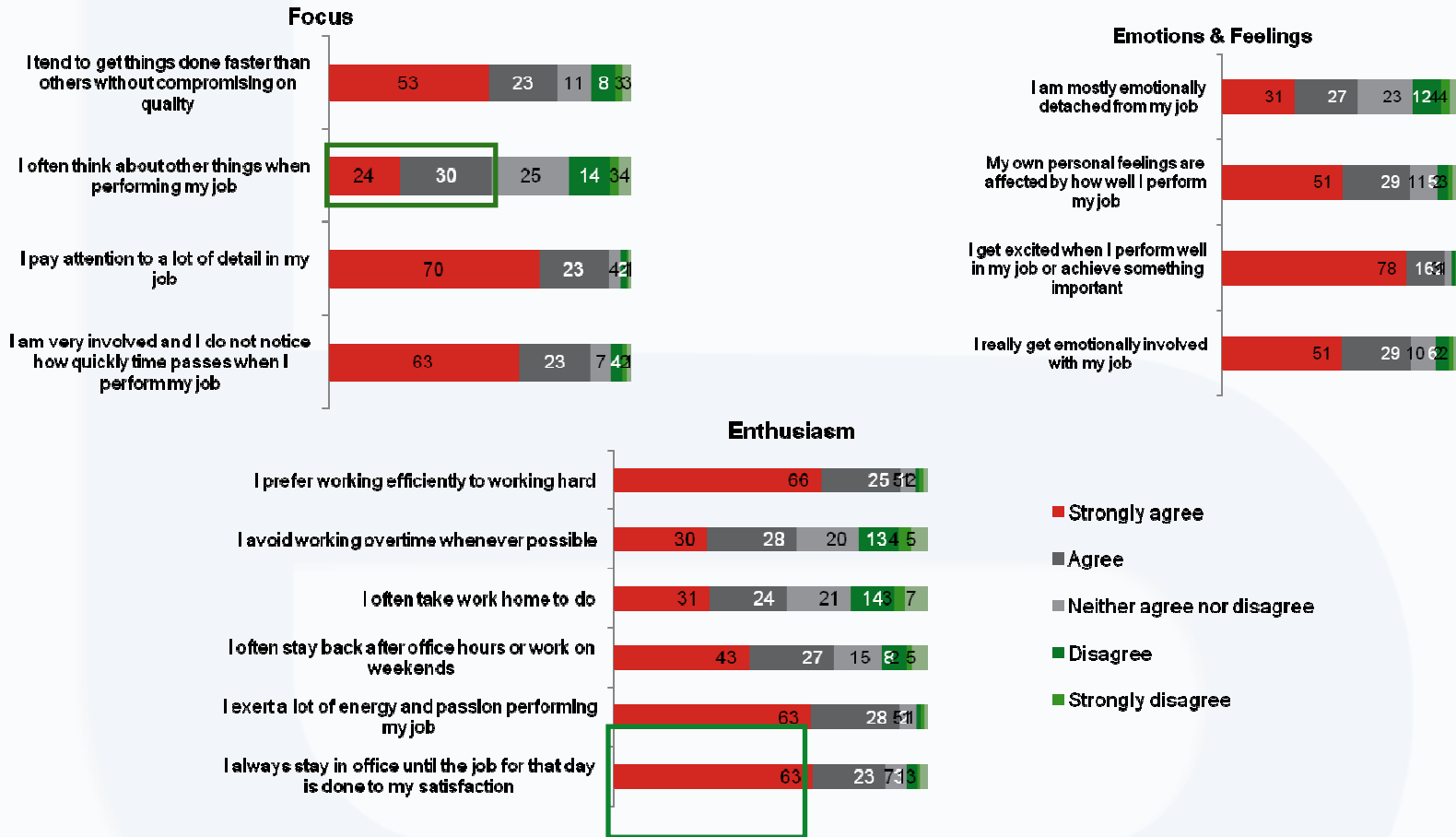
**Satisfaction with Work & Organisation**

Dissatisfaction for 'feedback & suggestion system' is consistent across nations.





## My Work Ethics

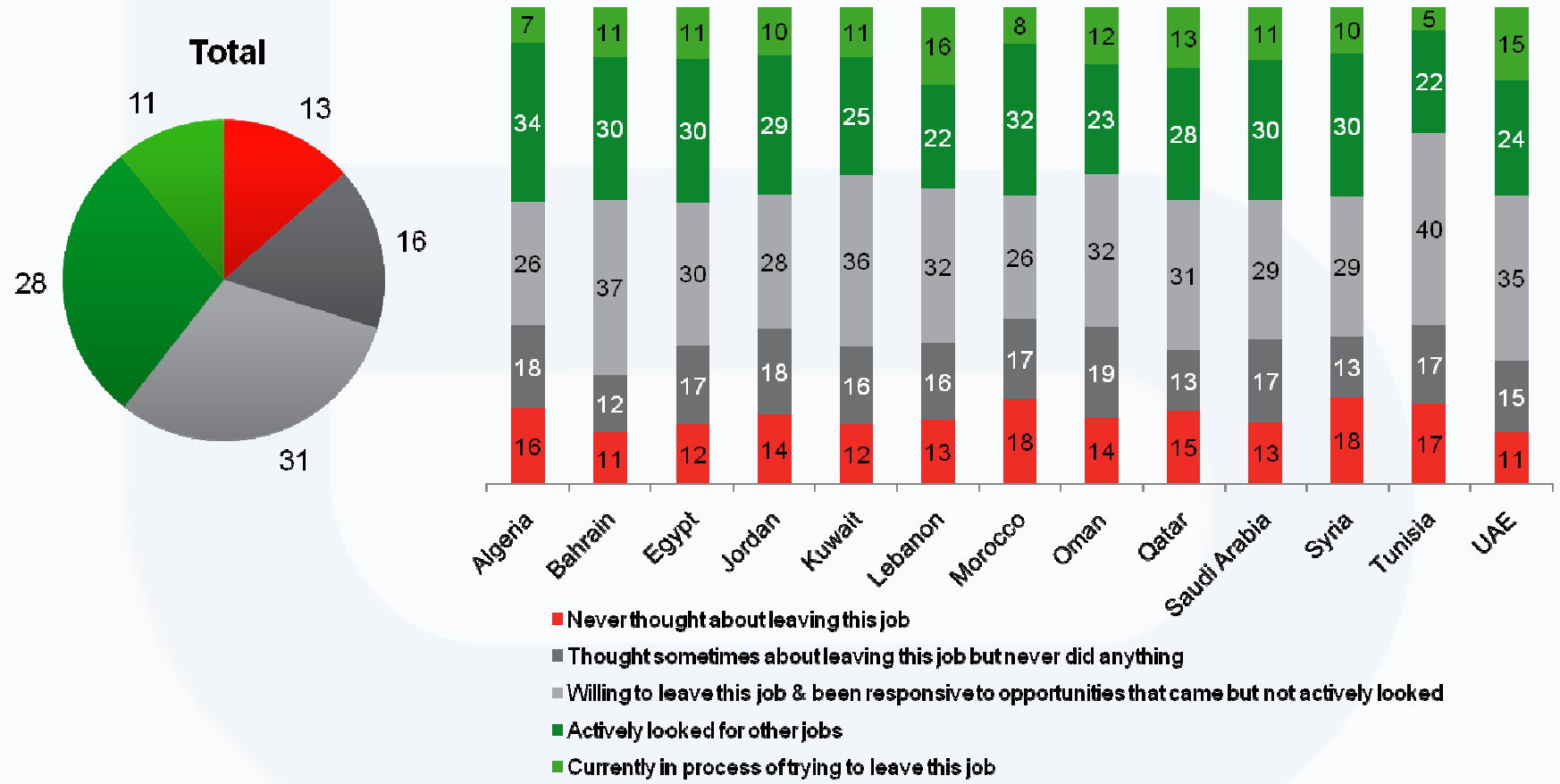


- 1) Please indicate how involved and focused you are with the work you do
- 2) Please indicate your emotions and feelings regarding the work you do.
- 3) Please indicate your energy and enthusiasm regarding the work you do

**Current State of Job**

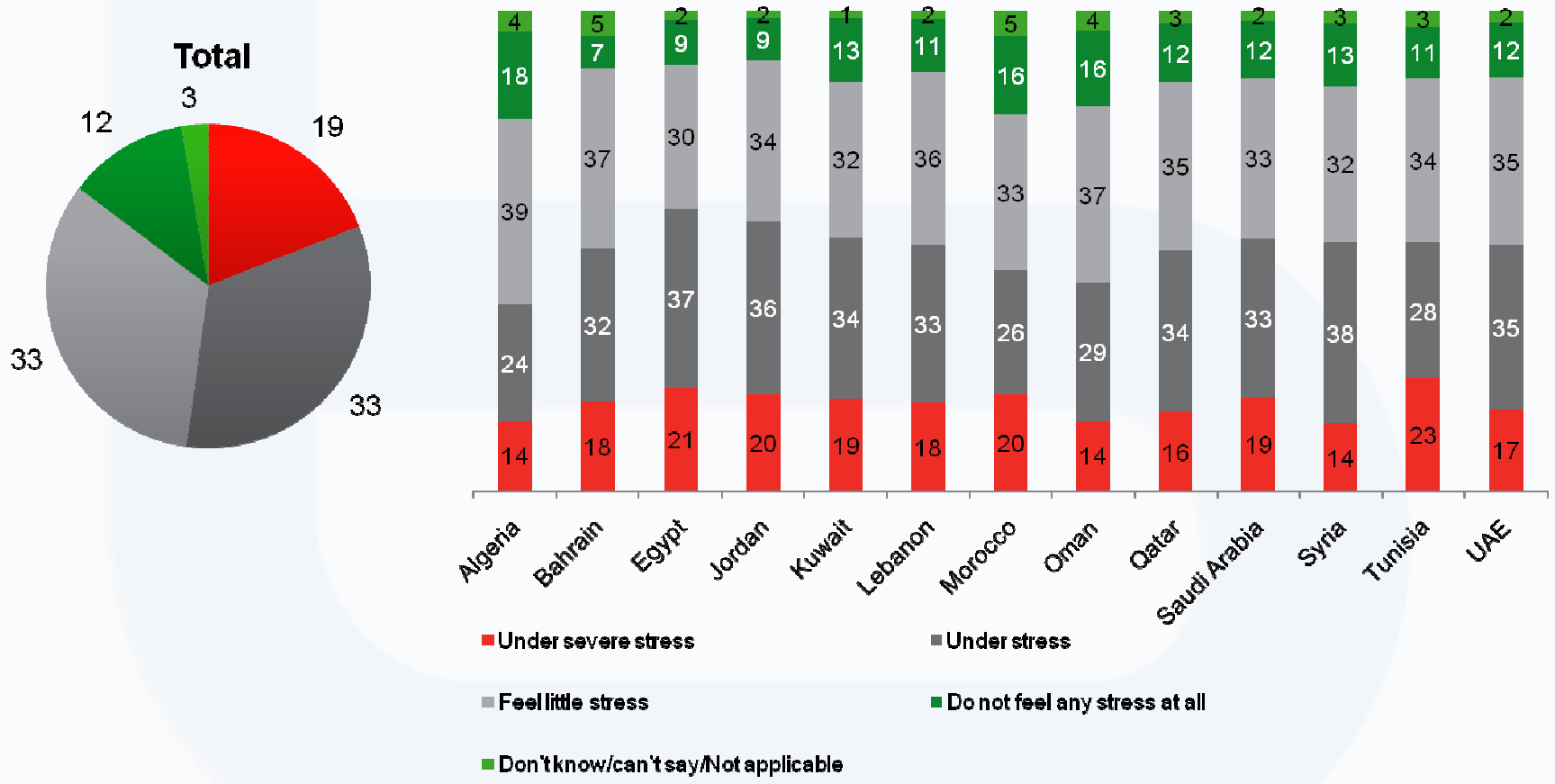
11% of respondents are planning to leave their current job & another 28% are in the process of actively looking for other jobs. Overall indicates unrest in the job market as far as employees are concerned – especially in markets with significant expat populations like UAE, Qatar, Bahrain as well as KSA.

Tunisia and to some extent Oman are more stable when evaluating the Bottom 2 box scores.



**Level of Stress**

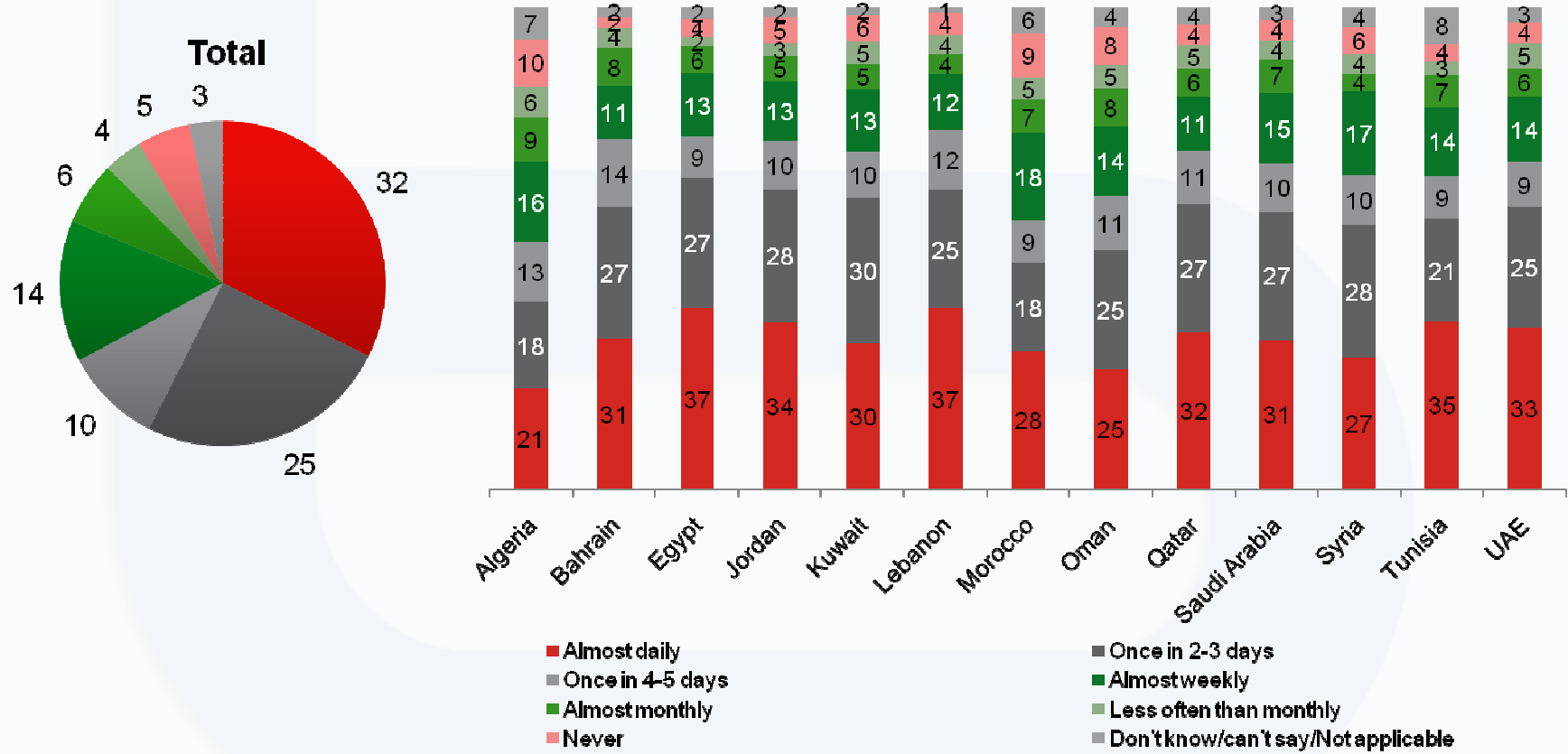
Over half of the respondents claim to have a stressful day at work. The same is true across different countries.



Please indicate how stressed you feel in your job on an average working day

**Excessive Work Pressure**

57% of the total respondents claim to have excessive pressure work on a day to day basis. Respondents from Egypt (64%) followed by Lebanon (62%) take the top spot amongst others.



Please indicate how frequently do you feel you are facing excessive work pressures

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