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EMPLOYMENT

INDEX

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Monster Employment Index Middle East dips Six Percent on Annual Basis

November 2012 Index Highlights:

- Monster Employment Index Middle East dips six percent on an annual basis
- Hospitality, followed by Retail/Trade and Logistics leads all industry sectors in annual growth
- Among occupation groups, Sales and BD exhibit strongest growth year-over-year; followed by Healthcare occupations
- Qatar leads all countries in annual growth. KSA registers steepest annual 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.

"Employers across Middle East continue to adopt a cautious approach owing to current global economic conditions. This cautious sentiment is reflected in the Monster Employment Index for November," said Sanjay Modi, Managing Director, Monster.com (India/ Middle- East/ South East Asia).



Jun 11	Jul 11	Aug 11	Sep 11	Oct 11	Nov 11	Dec 11	Jan 12	Feb 12	Mar 12	Apr 12	May 12	Jun 12	Jul 12	Aug 12	Sep 12	Oct 12	Nov 12	Y-o-y
93	96	103	112	119	133	137	125	132	141	145	137	129	127	125	123	128	125	-6%

Industry Year-over-Year Trends: Online opportunities exceeded November'11 levels in three of the 12 industry sectors monitored by the index.

- **Hospitality** (up 38 percent) led all sectors followed by **Retail/Trade and Logistics** (up 37 percent)
- **Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides** (down 19 percent) registered the steepest annual decline

Top Growth Industries

Year-over-year Growth	Nov 11	Nov 12	% Growth Y-o-y
Hospitality	103	142	38%
Retail/Trade and Logistics	123	169	37%
Advertising, Market Research, Public Relations, Media and Entertainment	117	119	2%
Education	127	125	-2%
Engineering, Construction and Real Estate	117	113	-3%

Lowest Growth Industries

Year-over-year Growth	Nov 11	Nov 12	% Growth Y-o-y
IT and Telecom/ISP	104	96	-8%
BFSI	126	116	-8%
Health Care	126	116	-8%
Oil and Gas	104	95	-9%
Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides	96	78	-19%

Occupation Year-over-Year Trends: Five of 11 occupation groups registered improved online demand over the year

- **Sales and BD** (up 25 percent) led all occupational groups in year-over-year growth
- **HR & Admin (down 26 percent)** followed by **Legal** (down 18 percent) professionals registered the weakest long-term trend

Top Growth Occupations

Year-over-year Growth	Nov 11	Nov 12	% Growth Y-o-y
Sales and BD	126	158	25%
Health Care	117	120	3%
Marketing & Communications/Arts/Creative	107	109	2%
Customer service	112	114	2%
Hospitality and Travel	118	119	1%

Lowest Growth Occupations

Year-over-year Growth	Nov 11	Nov 12	% Growth Y-o-y
Engineering and Production	116	115	-1%
Software, Hardware, Telecom	111	107	-4%
Finance and Account	126	106	-16%
Legal	95	78	-18%
HR & Admin.	137	102	-26%

Geographic Year-over-year Trends: Online opportunities exceeded November'11 level in four of the seven countries monitored by the Index.

- **Qatar** (up 24 percent) followed by **Bahrain** (up 20 percent) led all countries in year-over-year growth
- **KSA** (down 26 percent) continued to register the steepest decline over the past 12 months

Year-over-year Growth	Nov 11	Nov 12	% Growth Y-o-y
Qatar	97	120	24%
Bahrain	98	118	20%
UAE	120	129	8%
Oman	102	103	1%
Kuwait	117	109	-7%
Egypt	128	118	-8%
KSA	137	102	-26%

COUNTRY-WISE TRENDS

KSA Highlights

- Online recruitment activity in KSA declines 26 percent from November'11 level
- **Hospitality** (up 6 percent) registers the most notable annual growth
- **Purchase / Logistics / Supply Chain** (up one percent) leads in annual growth amongst the occupation groups

KSA Top Growth Industries

Year-over-year Growth	Nov 11	Nov 12	% Growth Y-o-y
Hospitality	120	127	6%
Production/Manufacturing, Automotive and Ancillary	102	102	0%
Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	128	123	-4%

KSA Lowest Growth Industries

Year-over-year Growth	Nov 11	Nov 12	% Growth Y-o-y
Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides	93	66	-29%
Engineering, Construction and Real Estate	115	78	-32%
Advertising, Market Research, Public Relations, Media and Entertainment	156	95	-39%

KSA Top Growth Occupations

Year-over-year Growth	Nov 11	Nov 12	% Growth Y-o-y
Purchase / Logistics / Supply Chain	119	120	1%
Software, Hardware, Telecom	119	113	-5%
Health Care	110	100	-9%

KSA Lowest Growth Occupations

Year-over-year Growth	Nov 11	Nov 12	% Growth Y-o-y
Finance and Account	122	97	-20%
Engineering and Production	131	102	-22%
Marketing & Communications/Arts/Creative	142	97	-32%

UAE Highlights

- UAE registers annual growth of 8 percent
- **Retail/Trade and Logistics** (up 45 percent) records the most notable growth in online opportunities over the year
- **Sales and BD** (up 11 percent) leads in annual growth amongst the occupation groups

UAE Top Growth Industries

Year-over-year Growth	Nov 11	Nov 12	% Growth Y-o-y
Retail/Trade and Logistics	114	165	45%
Hospitality	110	140	27%
BFSI	112	122	9%

UAE Lowest Growth Industries

Year-over-year Growth	Nov 11	Nov 12	% Growth Y-o-y
IT and Telecom/ISP	111	109	-2%
Consumer Goods/ FMCG, Food & Packaged Food, Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	109	101	-7%
Oil and Gas	125	113	-10%

UAE Top Growth Occupations

Year-over-year Growth	Nov 11	Nov 12	% Growth Y-o-y
Sales and BD	119	132	11%
Health Care	131	140	7%
Customer service	107	111	4%

UAE Lowest Growth Occupations

Year-over-year Growth	Nov 11	Nov 12	% Growth Y-o-y
Engineering and Production	111	104	-6%
HR & Admin.	109	102	-6%
Software, Hardware, Telecom	116	106	-9%

By Industry

	2011								2012				
	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
Engineering, Construction and Real Estate	117	128	117	128	134	136	132	127	126	123	111	112	113
BFSI	126	138	134	136	131	134	121	116	109	112	121	117	116
Production/Manufacturing, Automotive and Ancillary	121	122	125	125	124	129	138	124	124	124	118	135	116
Retail/Trade and Logistics	123	129	130	128	152	152	147	145	141	140	142	143	169
Oil and Gas	104	97	90	90	103	105	96	92	91	91	90	96	95
IT and Telecom/ISP	104	108	112	116	114	107	108	102	102	87	97	100	96
Hospitality	103	110	104	105	109	112	108	128	139	126	119	127	142
Education	127	138	138	147	137	125	132	127	132	127	127	120	125
Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides	96	110	101	105	108	114	116	104	93	85	89	100	78
Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	118	112	95	101	117	127	125	115	107	93	95	105	110
Health Care	126	129	119	130	129	118	113	109	111	100	112	114	116
Advertising, Market Research, Public Relations, Media and Entertainment	117	122	124	126	124	122	119	122	124	138	121	120	119

By Occupation

	2011								2012				
	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
Engineering and Production	116	121	111	117	126	125	120	117	119	118	114	117	115
Finance and Account	126	134	124	130	132	138	119	117	114	104	109	104	106
HR & Admin.	137	142	132	130	146	140	135	124	128	116	123	120	102
Sales and BD	126	138	141	146	156	163	157	152	150	137	155	160	158
Purchase / Logistics / Supply Chain	111	117	111	104	124	130	118	109	111	110	102	106	111
Hospitality and Travel	118	111	105	105	108	105	106	113	119	130	121	119	119
Health Care	117	124	122	134	129	124	114	109	110	107	113	116	120
Software, Hardware, Telecom	111	120	135	132	133	127	139	124	123	101	107	115	107
Marketing & Communications/Arts/Creative	107	123	123	130	125	122	116	118	116	109	111	111	109
Customer service	112	88	102	95	127	142	142	116	123	117	104	110	114
Legal	95	94	86	81	92	88	94	94	88	83	76	69	78

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. The Monster Employment Index's underlying data is validated for accuracy by Research America, Inc. – an independent, third-party auditing firm – to ensure that measured online job recruitment activity is within a margin of error of +/- 1.05%. 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.

About Monster Worldwide

Monster Worldwide, Inc. (NYSE: MWW - News), parent company of Monster, the premier global online employment solution for more than a decade, strives to inspire people to improve their lives. With a local presence in key markets in North America, Europe, and Asia, Monster works for everyone by connecting employers with quality job seekers at all levels and by providing personalized career advice to consumers globally. Through online media sites and services, Monster delivers vast, highly targeted audiences to advertisers. To learn more about Monster's industry-leading products and services, visit www.monster.com. More information about Monster Worldwide is available at <http://about-monster.com>.

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