

monster® EMPLOYMENT INDEX

Demand soars for jobs in the hospitality industry, reveals Monster Employment Index Middle East

- The banking and financial sector continues to be the best performer, closely followed by the hospitality industry
- Oil and gas registers the steepest online job recruitment decline of all sectors in the region
- Egypt (38% up) and KSA (32% up) continue to lead regional recruitment activity, but the UAE market picks up as well with a 16% increase year on year across industries

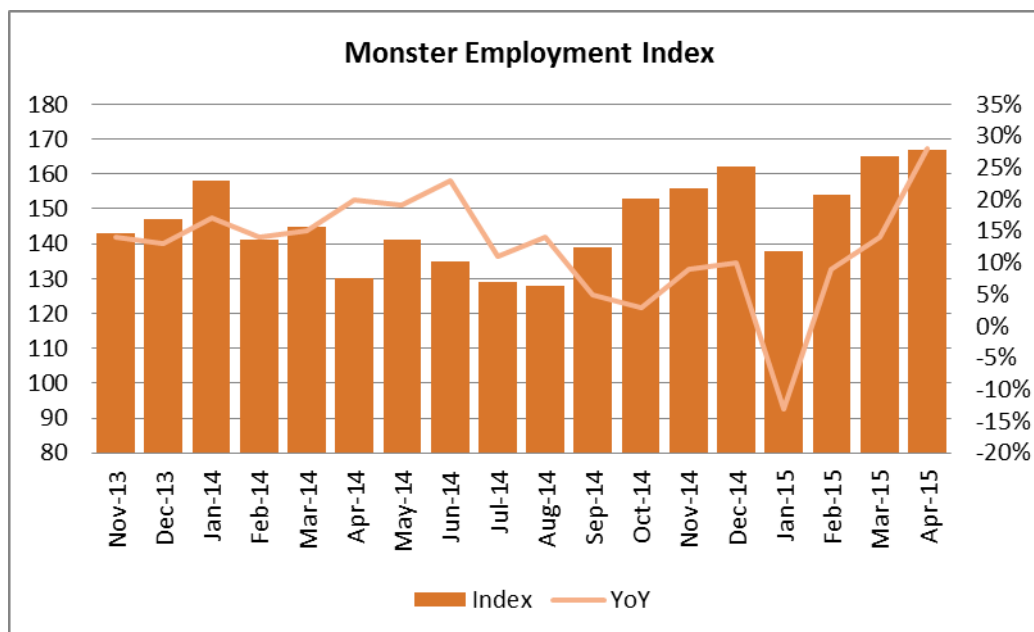
The Monster Employment Index is a monthly gauge of online job posting activity in Middle-East based on a real-time review of tens of thousands of employer job opportunities culled from a large representative selection of career Web sites and online job listings. The Index does not reflect the trend of any one advertiser or source, but is an aggregate measure of the change in job listings across the industry.

“The countries which are hiring the most continue to be KSA, and Egypt, with an increase of 32% and 38% respectively, in online recruitment activity, as compared to April 2014. Bahrain is also one of the top performers for the month of April 2015, with an increase in online job postings of 27% year on year, making it the third best performing country in the region. Online job listings in the UAE are picking up as well, having increased by 16% in April 2015,” said **Sanjay Modi, Managing Director, Monster.com (India, Middle East, South East Asia and Hong Kong)**

“Once again, the banking and finance industry remains strong, taking the lead in online recruitment activity, showing a 79% increase for the region, and a 30% increase for the UAE, as compared to the same period last year. Demand for finance and accounting professionals increased by 79% since April 2014 for the region, and 34% since April 2014 for the UAE. We attribute this growth to the positive developments in the region’s financial and banking sector, including the regulatory updates and the visible push from local governments to adhere to international best practices, good corporate governance and transparency.

“At the same time, we are happy to see a bounce back in hiring activity in the hospitality industry, which was the second best performer in the region, with a 54% increase in job listings in April 2015, as compared to the same period last year. This is not surprising and according to a recent PwC report, growth in the hotel industry is here to stay, with growth fundamentals for the regions’ hotel industry remaining strong. According to the report, the cities best placed for growth in the hotel industry in 2015 are Jeddah and Abu Dhabi.

“A closer analysis of the data shows that demand for hospitality and travel professional is one of the lowest among occupations, with an increase of 17% for the region and only 5% for the UAE. Therefore, we believe the hospitality industry will be hiring a variety of professionals such as IT, marketing, legal, accountants, etc and not only specialised hospitality consultants.”



Nov 13	Dec 13	Jan 14	Feb 14	Mar 14	Apr 14	May 14	Jun 14	Jul 14	Aug 14	Sep 14	Oct 14	Nov 14	Dec 14	Jan 15	Feb 15	Mar 15	Apr 15	Y-o-Y
143	147	158	141	145	130	141	135	129	128	139	153	156	162	138	154	165	167	28%

Industry Year-over-Year Trends: Online opportunities exceed the year-ago level in 10 of the 12 industry sectors monitored by the Index.

- **BFSI** led all industry sectors for the third consecutive month charting a dramatic 79 percent growth on the year. The sector exhibited noticeable growth in opportunities in the last few months. Available opportunities in the sector this month exceeded January 2015 by a robust 24 percent.
- **Consumer Goods/ FMCG, Food & Packaged Food, Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery** (up 10 percent) industry witnessed an increase in online recruitment activity this month. The sector has been charting negative annual growth since October 2013. Nevertheless, the Index reading for the series is still below the baseline.
- Online hiring in **Production/Manufacturing, Automotive and Ancillary** has dropped considerable. The sector has failed to match the year-ago level since November 2012. A five percent annual drop registered this month is 22 percentage points lower than that witnessed in March 2015.
- **Oil and Gas** (down nine percent) registered the steepest annual decline among industry sectors.

Top Growth Industries

Year-over-year Growth	Apr 14	Apr 15	% Growth Y-o-Y
BFSI	121	217	79%
Hospitality	143	220	54%

Lowest Growth Industries

Year-over-year Growth	Apr 14	Apr 15	% Growth Y-o-Y
Retail/Trade and Logistics	151	166	10%
Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	83	91	10%

Advertising, Market Research, Public Relations, Media and Entertainment	117	157	34%
IT and Telecom/ISP	96	120	25%
Education	166	203	22%

Health Care	145	152	5%
Production/Manufacturing, Automotive and Ancillary	87	83	-5%
Oil and Gas	82	75	-9%

Occupation Year-over-Year Trends: Online demand improved for ten occupational groups out of the 11 groups monitored by the Index.

- **Software, Hardware, Telecom** (up 83 percent) professionals witnessed dramatic growth in demand year-on-year. Demand for the group surged the most since January. Between January and April 2015 there has been a 57 percent growth in demand for Software, Hardware, Telecom personnel.
- There is a progressive growth in demand for **Engineering and Production** professionals since February 2015. The group registered a 13 percent growth in demand from the year-ago level this month.
- **Customer service** registered a positive growth this month following seven consecutive declines starting September 2014; up by one percent.
- **Health Care** professionals saw demand slip two percent below the year-ago level. This is the only group to chart negative annual growth this month.

Top Growth Occupations

Year-over-year Growth	Apr 14	Apr 15	% Growth Y-o-Y
Software, Hardware, Telecom	95	174	83%
Finance and Account	106	190	79%
Legal	79	128	62%
Marketing & Communications/Arts/Creative	171	222	30%
HR & Admin.	141	183	30%

Lowest Growth Occupations

Year-over-year Growth	Apr 14	Apr 15	% Growth Y-o-Y
Purchase / Logistics / Supply Chain	91	109	20%
Hospitality and Travel	175	205	17%
Engineering and Production	124	140	13%
Customer service	69	70	1%
Health Care	143	140	-2%

Geographic Year-over-year Trends: Online hiring surpassed the year-ago level in six out of seven countries monitored by the Index.

- **Egypt** (up 38 percent) followed by **KSA** (up 32 percent) chart the steepest year-on growth even this month. In fact the long-term growth momentum improved significantly from March 2015 in both the countries; up by 11 percentage points and 10 percentage points respectively.
- Online recruitment market appears to have rebounded in **UAE** (up 16 percent) as the Index for the series registered the second successive annual growth this month. Hiring activity also exhibited an improved pace of growth. The three-month growth turned positive for the first time this year.

- **Kuwait** (down 13 percent) is the only country to exhibit negative annual growth rate yet again. The rate of growth eased further; down from a negative seven percent in March 2015 to a negative 13 percent this month.

Year-over-year Growth	Apr 14	Apr 15	% Growth Y-o-Y
Egypt	138	190	38%
KSA	113	149	32%
Bahrain	113	143	27%
Qatar	126	149	18%
Oman	102	118	16%
UAE	103	119	16%
Kuwait	144	125	-13%

COUNTRY-WISE TRENDS

KSA Highlights

- Monster Employment Index KSA grows 32 percent on the year
- **Advertising, Market Research, Public Relations, Media and Entertainment** leads all industry groups year-on-year
- **Oil and Gas** registers a marginal one percent growth this month
- Among occupation groups, **Purchase / Logistics / Supply Chain** registers the most notable growth in annual demand

KSA Top Growth Industries

Year-over-year Growth	Apr 14	Apr 15	% Growth Y-o-Y
Advertising, Market Research, Public Relations, Media and Entertainment	99	175	77%
IT and Telecom/ISP	102	140	37%
Engineering, Construction and Real Estate	92	121	32%

KSA Lowest Growth Industries

Year-over-year Growth	Apr 14	Apr 15	% Growth Y-o-Y
Health Care	102	107	5%
Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	96	100	4%
Oil and Gas	102	103	1%

KSA Top Growth Occupations

Year-over-year Growth	Apr 14	Apr 15	% Growth Y-o-Y
Purchase / Logistics / Supply Chain	94	151	61%
Software, Hardware, Telecom	107	166	55%

KSA Lowest Growth Occupations

Year-over-year Growth	Apr 14	Apr 15	% Growth Y-o-Y
HR & Admin.	109	137	26%
Sales and BD	166	190	14%

Marketing & Communications/Arts/Creative	96	143	49%
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Health Care	100	109	9%
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UAE Highlights

- Monster Employment Index UAE exceeds the year-ago level by 16 percent
- **BFSI** tops the long-term growth chart yet again
- Online recruitment activity eases the most in **Oil and Gas** sector
- **Software, Hardware, Telecom** professionals witness the steepest growth in online demand, year-on-year

UAE Top Growth Industries

Year-over-year Growth	Apr 14	Apr 15	% Growth Y-o-Y
BFSI	122	159	30%
IT and Telecom/ISP	85	105	24%
Health Care	132	152	15%

UAE Lowest Growth Industries

Year-over-year Growth	Apr 14	Apr 15	% Growth Y-o-Y
Engineering, Construction and Real Estate	116	112	-3%
Production/Manufacturing, Automotive and Ancillary	102	91	-11%
Oil and Gas	86	73	-15%

UAE Top Growth Occupations

Year-over-year Growth	Apr 14	Apr 15	% Growth Y-o-Y
Software, Hardware, Telecom	71	116	63%
Finance and Account	94	126	34%
Marketing & Communications/Arts/Creative	92	115	25%

UAE Lowest Growth Occupations

Year-over-year Growth	Apr 14	Apr 15	% Growth Y-o-Y
Purchase / Logistics / Supply Chain	107	117	9%
Hospitality and Travel	93	98	5%
Customer service	61	57	-7%

By Industry

	2014									2015			
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
Engineering, Construction and Real Estate	131	122	127	130	121	135	142	151	151	134	146	151	156
BFSI	121	139	142	136	136	152	163	176	194	175	192	201	217
Production/Manufacturing, Automotive and Ancillary	87	84	81	88	92	85	85	85	87	68	78	80	83
Retail/Trade and Logistics	151	150	154	142	141	157	155	155	159	151	162	163	166
Oil and Gas	82	88	84	90	95	88	96	94	97	78	83	83	75
IT and Telecom/ISP	96	98	93	93	93	95	103	104	108	101	110	116	120
Hospitality	143	152	186	161	161	178	185	194	194	197	205	212	220
Education	166	169	179	165	162	170	207	173	186	187	199	197	203
Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides	78	87	87	92	89	102	102	93	94	79	81	81	91
Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	83	79	74	86	87	78	81	82	84	55	78	81	91
Health Care	145	159	153	146	143	147	145	152	162	146	151	151	152
Advertising, Market Research, Public Relations, Media and Entertainment	117	135	128	119	119	123	127	133	139	142	148	155	157

By Occupation

	2014									2015			
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
Engineering and Production	124	112	124	131	125	129	136	140	143	127	131	136	140
Finance and Account	106	122	133	127	129	135	150	159	167	155	172	169	190
HR & Admin.	141	143	154	130	133	145	152	164	165	149	174	179	183
Sales and BD	188	194	195	172	174	195	211	208	199	187	213	232	232
Purchase / Logistics / Supply Chain	91	91	90	97	95	90	94	104	106	99	104	98	109
Hospitality and Travel	175	176	184	165	163	176	187	184	188	189	198	200	205
Health Care	143	158	158	155	133	141	148	150	148	134	140	140	140
Software, Hardware, Telecom	95	100	96	110	111	115	152	142	129	111	141	174	174
Marketing & Communications/Arts/Creative	171	179	170	155	160	165	175	183	191	192	202	212	222
Customer service	69	66	62	67	77	81	82	70	62	52	54	55	70
Legal	79	89	79	94	100	98	106	106	118	111	119	120	128

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) is a global leader in connecting people to jobs, wherever they are. For more than 20 years, Monster has helped people improve their lives with better jobs, and employers find the best talent. Today, the company offers services in more than 40 countries, providing some of the broadest, most sophisticated job seeking, career management, recruitment and talent management capabilities. Monster continues its pioneering work of transforming the recruiting industry with advanced technology using intelligent digital, social and mobile solutions, including our flagship website monster.com® and a vast array of products and services. For more information visit monster.com/about.