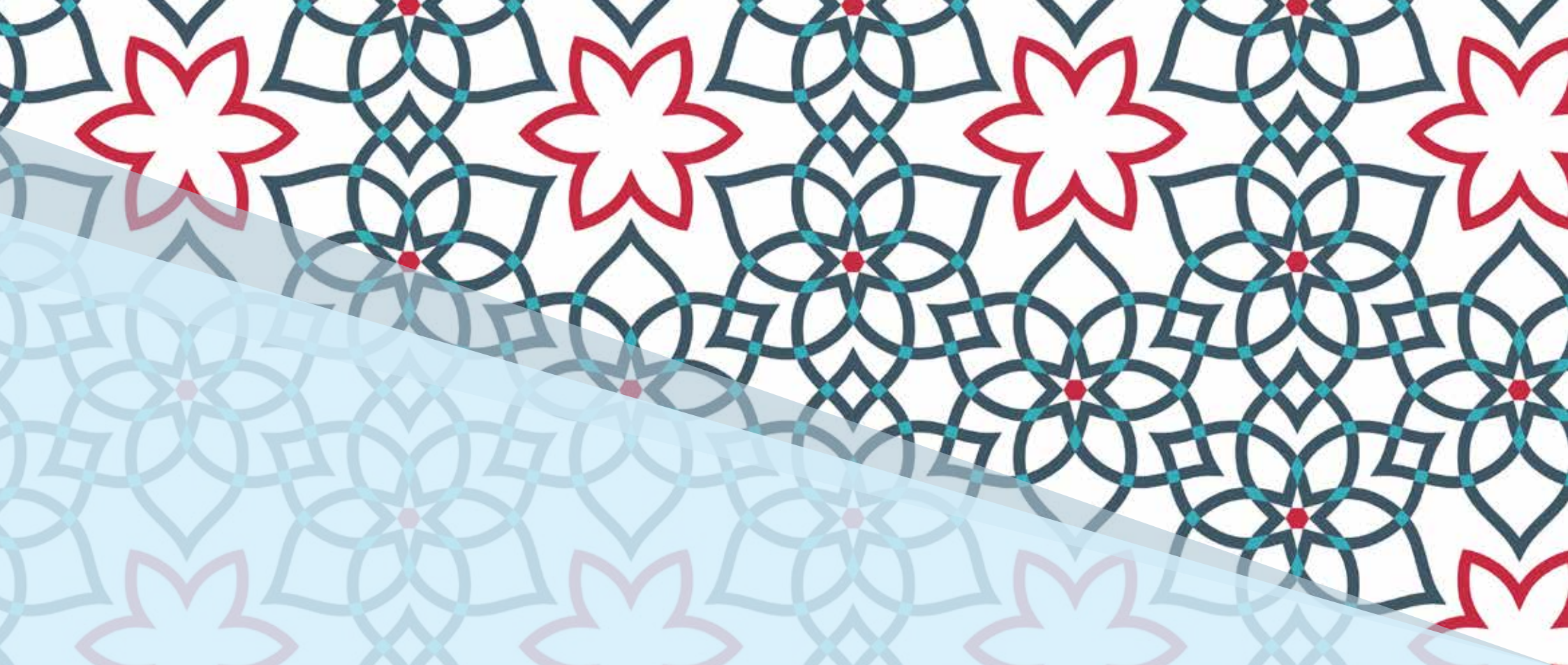




Qatar Employment Report

Insights for 2016

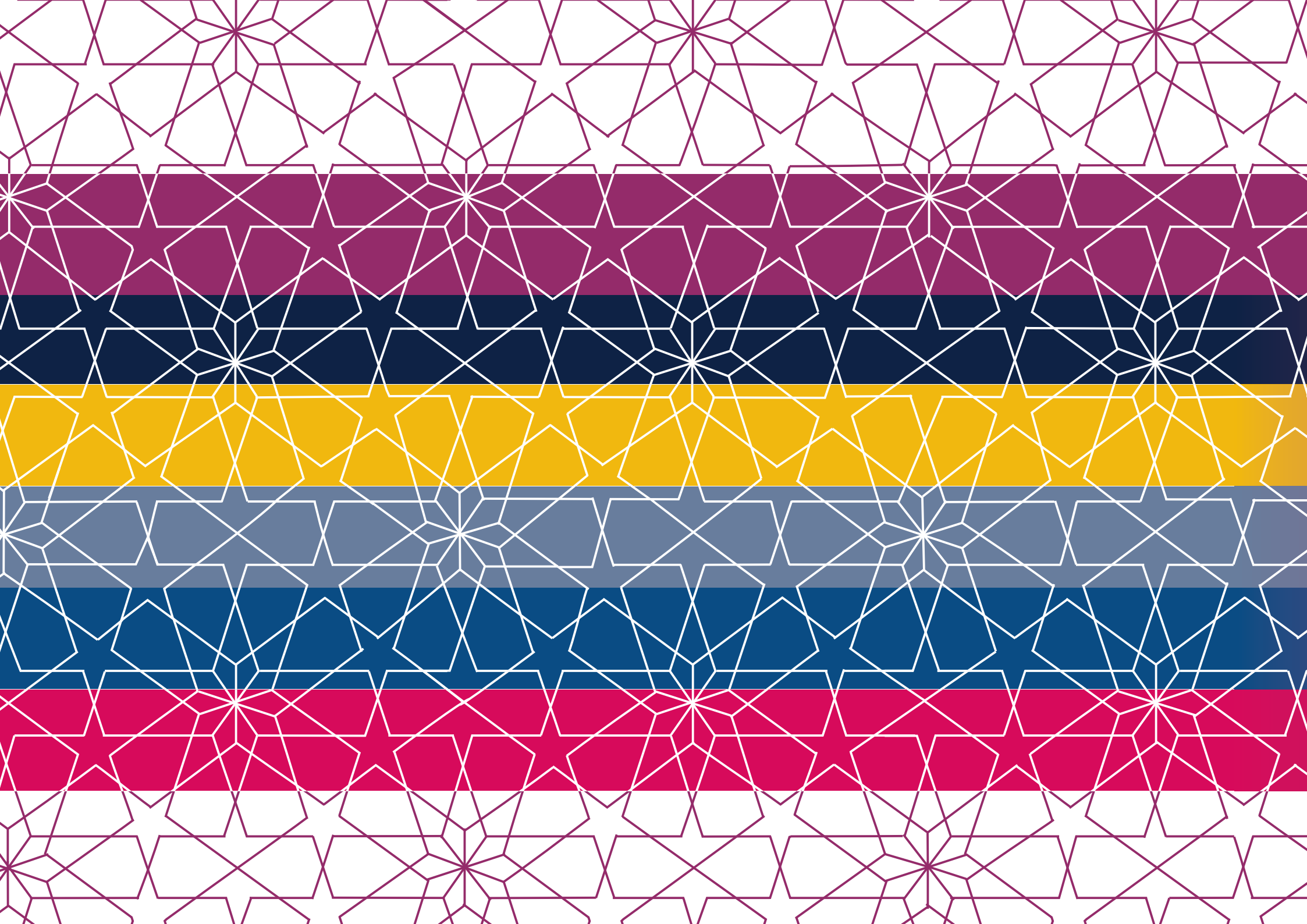
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Introduction



In December of 2015, Oxford Strategic Consulting conducted a survey of Qatari nationals on their opinions pertaining to employment. This report provides a summary of the results and offers new insights underpinning the current and future aspirations of Qataris which will serve as a useful tool to both the private and public sectors as well as governments and organisations. It is clear that there are significant and dynamic shifts in the labour market in terms of motivation, ideal careers and approaches to employment for the under 30s.

Methodology

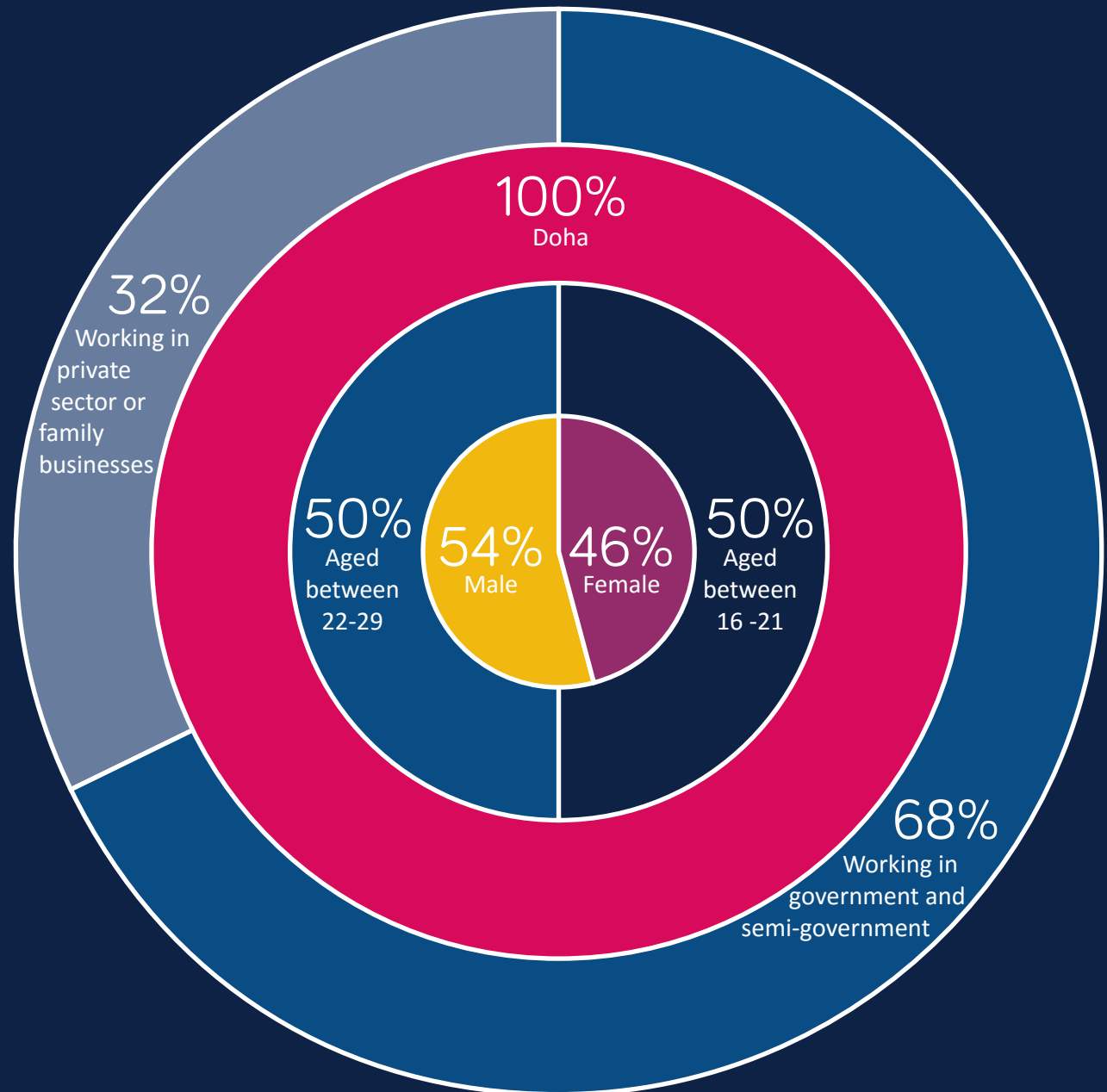


We asked 300 Qatari nationals aged under 30 about their views and attitudes towards employment in Qatar.

- Interviews were conducted over the phone by a third party fieldwork provider.
- The survey covered their motivations, perceptions of the best employers, their ideal job role, the best way for employers to attract nationals, the most & least attractive employment sectors, the importance of the private sector and difficulties faced when searching for jobs.
- The results have been presented at an overall level and also split by gender, age, working status and employment sector. Chi square and correlation tests have been carried out where appropriate.

Sample Breakdown

- The survey was nationally representative of males (54%) and females (46%)
- Respondents were aged between 16 and 29 years old
 - Gen Z - 50% were aged between 16 and 21 years old (mainly students)
 - Gen Y - 50% were aged between 22 and 29 years old (mainly working full or part-time)
- All respondents were based in Doha (100%)
- Two thirds of those who worked full or part-time worked in government or semi-government roles (68%) and the remaining 32% worked in either the private sector or family businesses

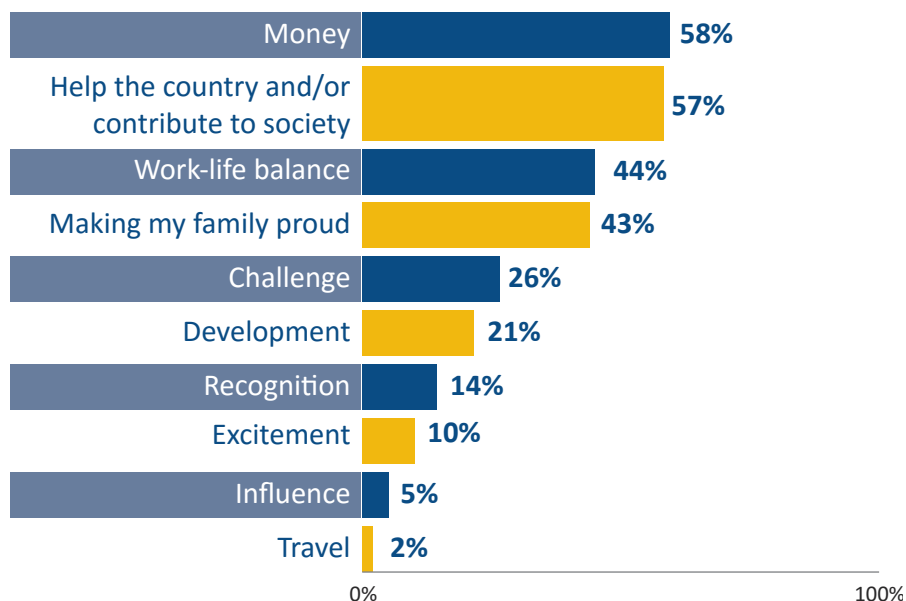


Results

Motivations

Respondents were asked to select up to three things that motivated them the most in life.

Which of the following motivates you the most?



Top-line Insights

Respondents were most likely to be motivated by money (58%) and helping the country / contributing to society (57%). Work-life balance (44%) and making their family proud (43%) were also popular motivators.

Only 10% were motivated by excitement and 5% by influence. Very few respondents were motivated by travel (2%).

Demographic Insights

Males were significantly more likely than females to be motivated by helping the country / contributing to society (64% vs. 48%), recognition (19% vs. 8%) and travel (4% vs. 0%). Whereas females were significantly more likely than males to be motivated by excitement (17% vs. 3%) and influence (11% vs. 1%).

There were no significant differences in motivations by age group or working status.

Those working in the private sector were significantly more likely than those working in government or semi-government roles to be motivated by excitement (20% vs. 7%).

Industry of Choice

Respondents were asked to select which industries they would most like to work in at present. They were allowed to select multiple industries.

Top-line Insights

Six out of ten respondents (60%) would most like to work for the Government / Public Sector and almost half (49%) wanted to work in Defence and Security (49%).

Four out of ten desired a career in Oil and Gas (41%) and a further quarter (26%) wanted to work in Banking and Finance.

Demographic Insights

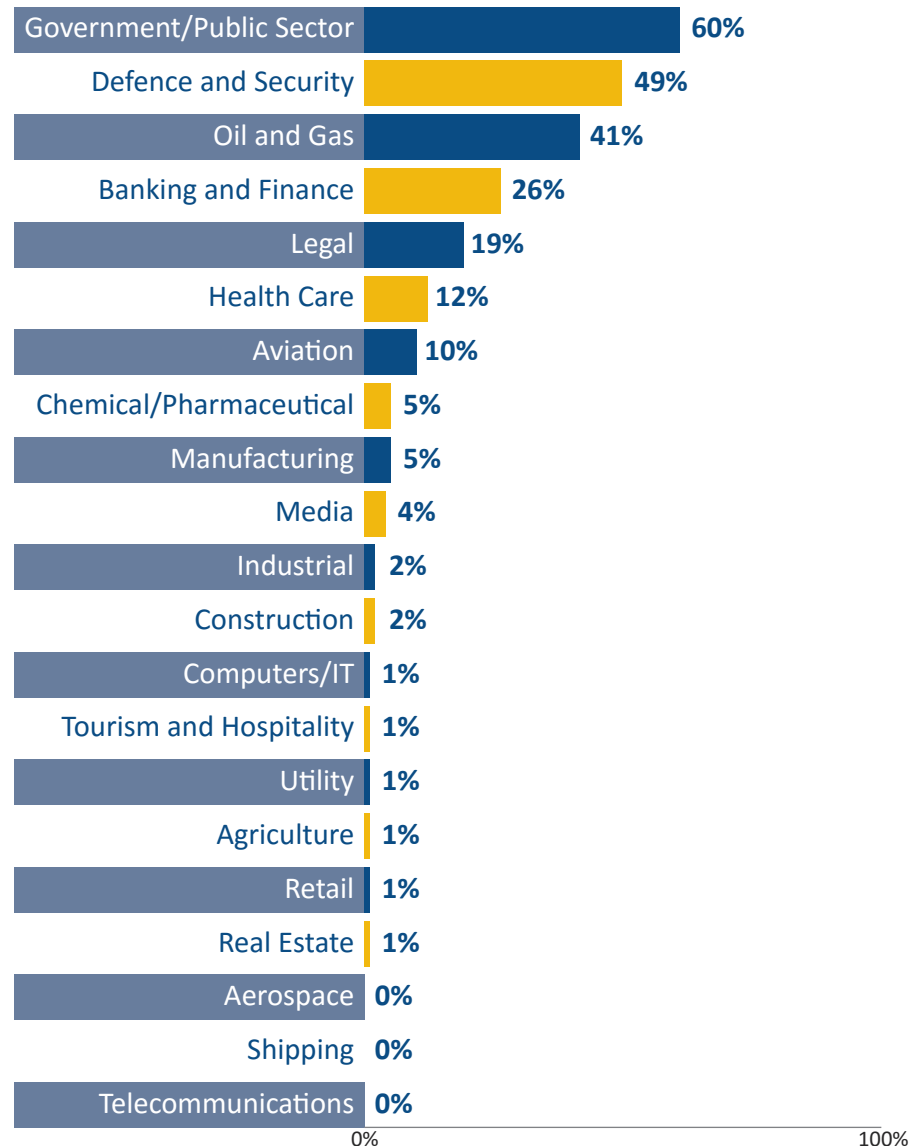
Males were significantly more likely to desire a career in Defence and Security (57% vs. 40%). Whereas females were significantly more likely to desire a career in Banking and Finance (33% vs. 20%) or Health Care (17% vs. 7%).

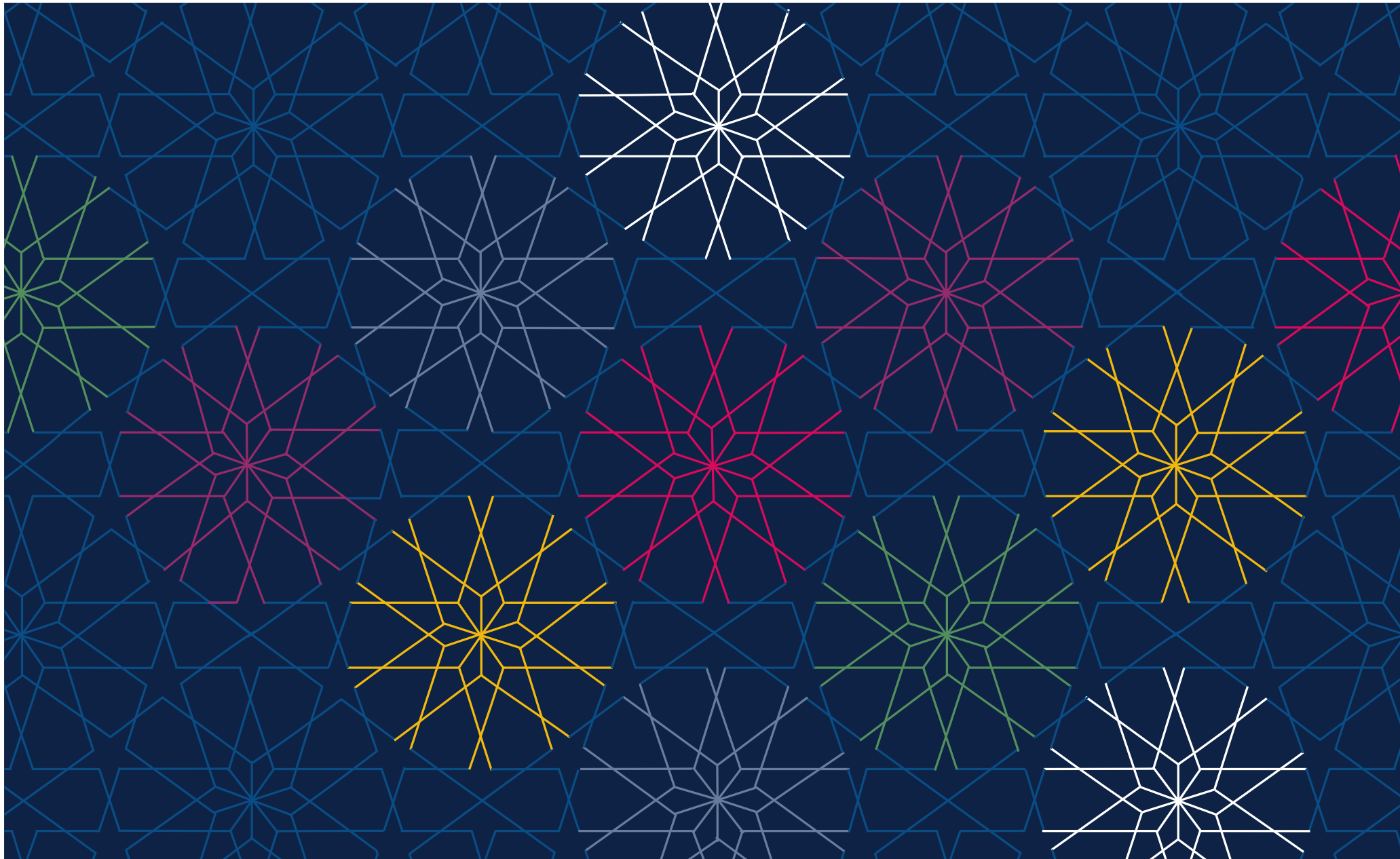
Gen Y (22-29 Years) were significantly more likely to desire a career in Health Care (16% vs. 7%).

Students were significantly more likely than those working full or part-time to desire a career in Government / Public Sector (65% vs. 51%).

There were no significant differences between employment sectors.

Which of the following industries would you most like to work in?

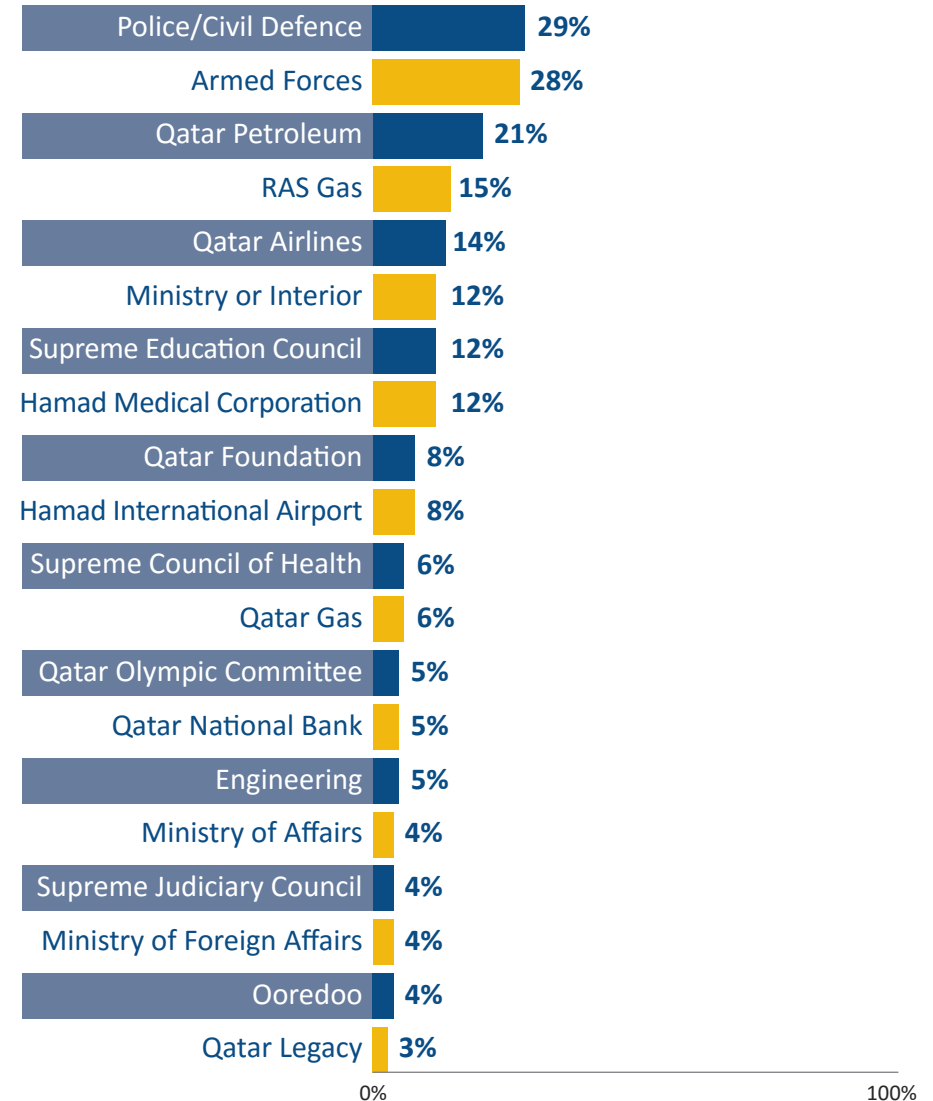




Employers of Choice

Respondents were asked to list up to five organisations where they would ideally like to work in the future. The 300 respondents mentioned a total of 745 organisations – an average of two per respondent. The chart below displays the top 20 organisations mentioned by respondents.

Please tell us the top five organisations you would ideally like to work for in the future.



Top-line Insights

Police / Civil Defence (29%) and the Armed Forces (28%) were the organisations most mentioned by respondents. A further fifth (21%) mentioned Qatar Petroleum and 15% mentioned RAS Gas (15%).

Demographic Insights

Males were significantly more likely than females to want to work for:-

- Police / Civil Defence (51% vs. 4%)
- Armed Forces (47% vs. 6%)
- RAS Gas (25% vs. 3%)
- Qatar Olympic Committee (10% vs. 0%)
- Engineering (9% vs. 0%)
- Qatar Legacy (6% vs. 0%)

Females were significantly more likely than males to want to work for:-

- Supreme Education Council (23% vs. 2%)
- Hamad Medical Corporation (22% vs. 3%)
- Ministry of Interior (17% vs. 7%)
- Hamad International Airport (14% vs. 2%)
- Supreme Council of Health (13% vs. 1%)
- Qatar National Bank (11% vs. 0%)
- Ministry of Affairs (8% vs. 1%)
- Ooredoo (6% vs. 1%)

Gen Z (16-21 Years) were significantly more likely to want to work for the Police / Civil Defence (35% vs. 23%) or the Armed Forces (35% vs. 21%). Whereas Gen Y (22-29 Years) were significantly more likely to want to work for the Supreme Council of Health (10% vs. 3%).

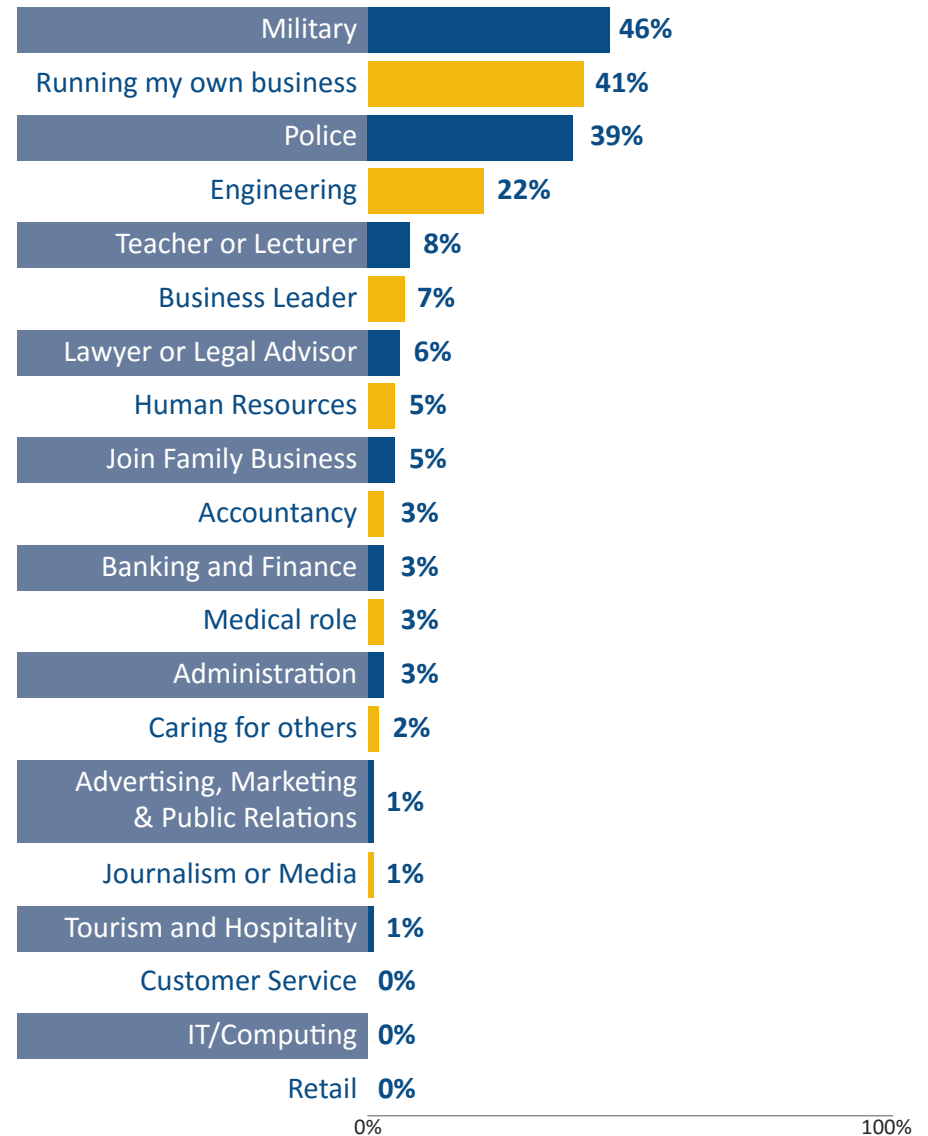
Those working full or part-time were significantly more likely to want to work for RAS Gas (21% vs. 11%) or Qatar Foundation (13% vs. 6%). Whereas students were significantly more likely to want to work for the Police / Civil Defence (38% vs. 15%) or the Armed Forces (37% vs. 13%).

Those working in the private sector were significantly more likely than those working in government or semi-government to want to work for Qatar Foundation (23% vs. 8%) or Hamad International Airport (20% vs. 4%).

Ideal Job Role

Respondents were asked to select their ideal job role. They were allowed to select as many job roles as they wanted.

What would be your ideal role in the future?



Top-line Insights

Almost half of respondents felt their ideal career was in the military (46%) and 39% wanted to work for the police (39%).

Over four out of ten (41%) wanted to run their own business. A further 22% desired a career in engineering.

Demographic Insights

Males were significantly more likely to consider their ideal role in the military (65% vs. 23%), police (57% vs. 17%) or engineering (27% vs. 15%). Whereas females were significantly more likely to consider their ideal role in teaching (15% vs. 2%), human resources (11% vs. 1%), banking and finance (7% vs. 0%), medicine (6% vs. 1%) or caring for others (5% vs. 0%).

Gen Z (16-21 Years) were significantly more likely than Gen Y (22-29 Years) to consider their ideal career in the military (53% vs. 39%) or engineering (27% vs. 16%).

Those working full or part-time were significantly more likely to consider their ideal role as a business leader (11% vs. 9%). Whereas students were significantly more likely to consider their ideal role in the military (53% vs. 33%), police (43% vs. 31%) or engineering (26% vs. 15%).

Those working in government or semi-government roles were significantly more likely than those working in the private sector to consider their ideal role in engineering (20% vs. 3%).

Least Favoured Industry

Respondents were asked to select which industries they would least like to work in. They were allowed to select as many industries as they wanted.

Top-line Insights

The least popular industry to work in was Government / Public Sector (27%), followed by Banking and Finance (17%), Retail (16%) and Construction (16%).

Healthcare (13%), Media (13%) and Legal (13%) were also frequently selected as industries where respondents would least like to work.

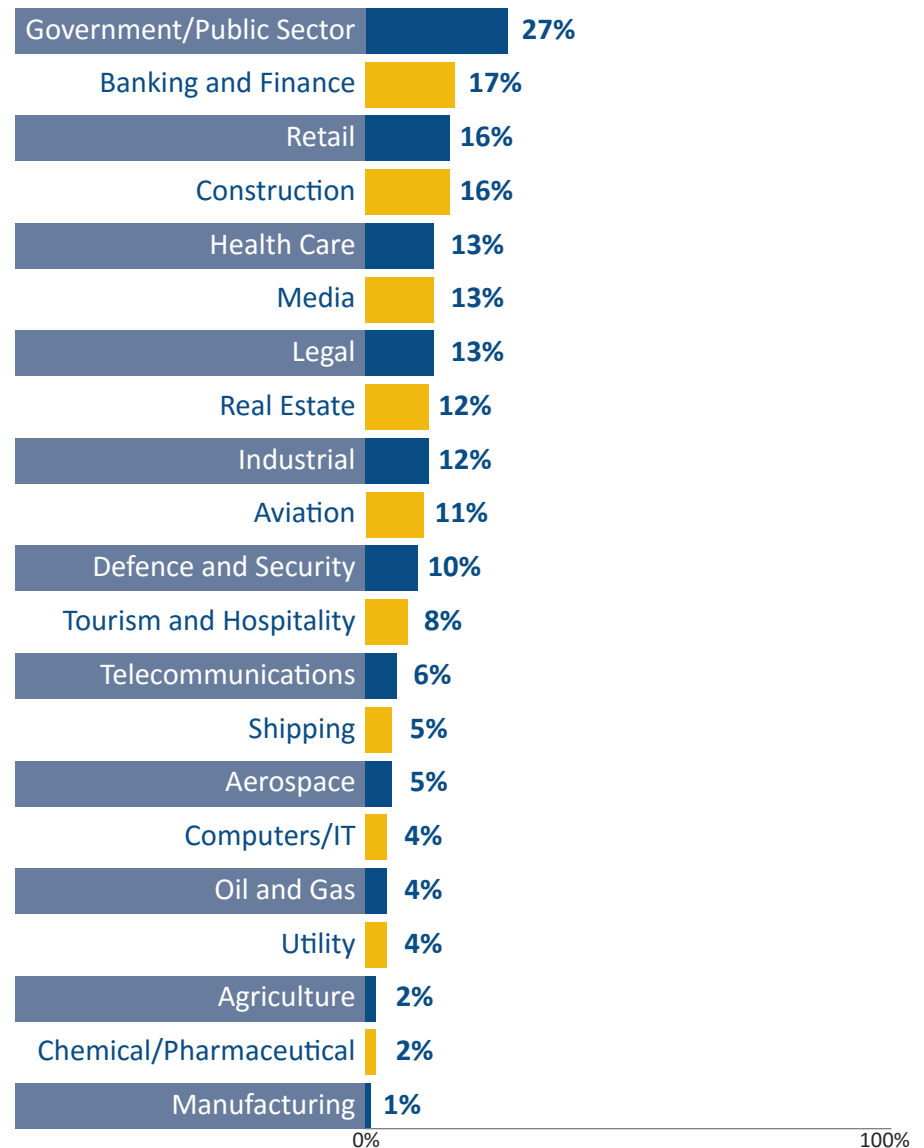
Demographic Insights

Males were significantly more likely to select Retail (20% vs. 12%), Healthcare (21% vs. 4%) and Telecommunications (9% vs. 3%). Whereas females were significantly more likely to select Real Estate (17% vs. 8%), Industrial (17% vs. 7%), Defence and Security (15% vs. 6%), Tourism and Hospitality (15% vs. 3%), Computers/IT (7% vs. 2%), Oil and Gas (8% vs. 1%) or Agriculture (5% vs. 0%).

Gen Z (aged 16-21) were significantly more likely to select Retail (21% vs. 12%) as the industry they would least like to work, whereas Gen Y (22-29) were significantly more likely to select Oil and Gas (7% vs. 1%).

There were no significant differences between working status or sector.

Which of the following industries would you least like to work in?









Importance of the Private Sector

Respondents were asked to rate how important the private sector was for the employment of Qataris in their country.

How important is the private sector for the employment of Qataris in your country?

■ Not important at all ■ Of little importance ■ Somewhat important
■ Very important ■ Extremely important



Top-line Insights

Approximately a fifth of respondents (19%) felt the private sector was extremely (8%) or very important (11%) for the employment of Qatari nationals. The majority (69%) only felt it was somewhat important. A further 12% felt it was not important.

Demographic Insights

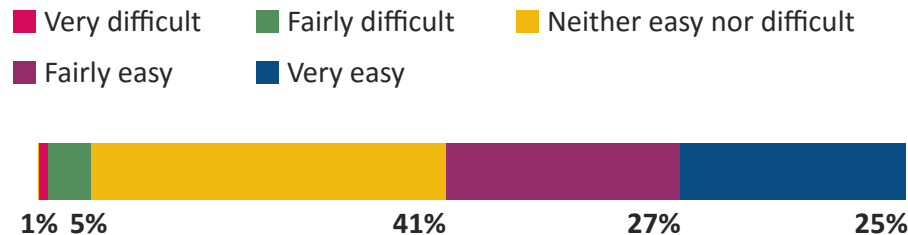
Females were significantly more likely than males to consider the private sector important for the employment of Qatari nationals (29% vs. 12%).

There were no other significant differences between sub groups.

Ease of Finding a Job

Respondents were asked to rate how easy or difficult it was for a Qatari to find a job in their country.

How easy or difficult is it for a Qatari to find a job in your country?

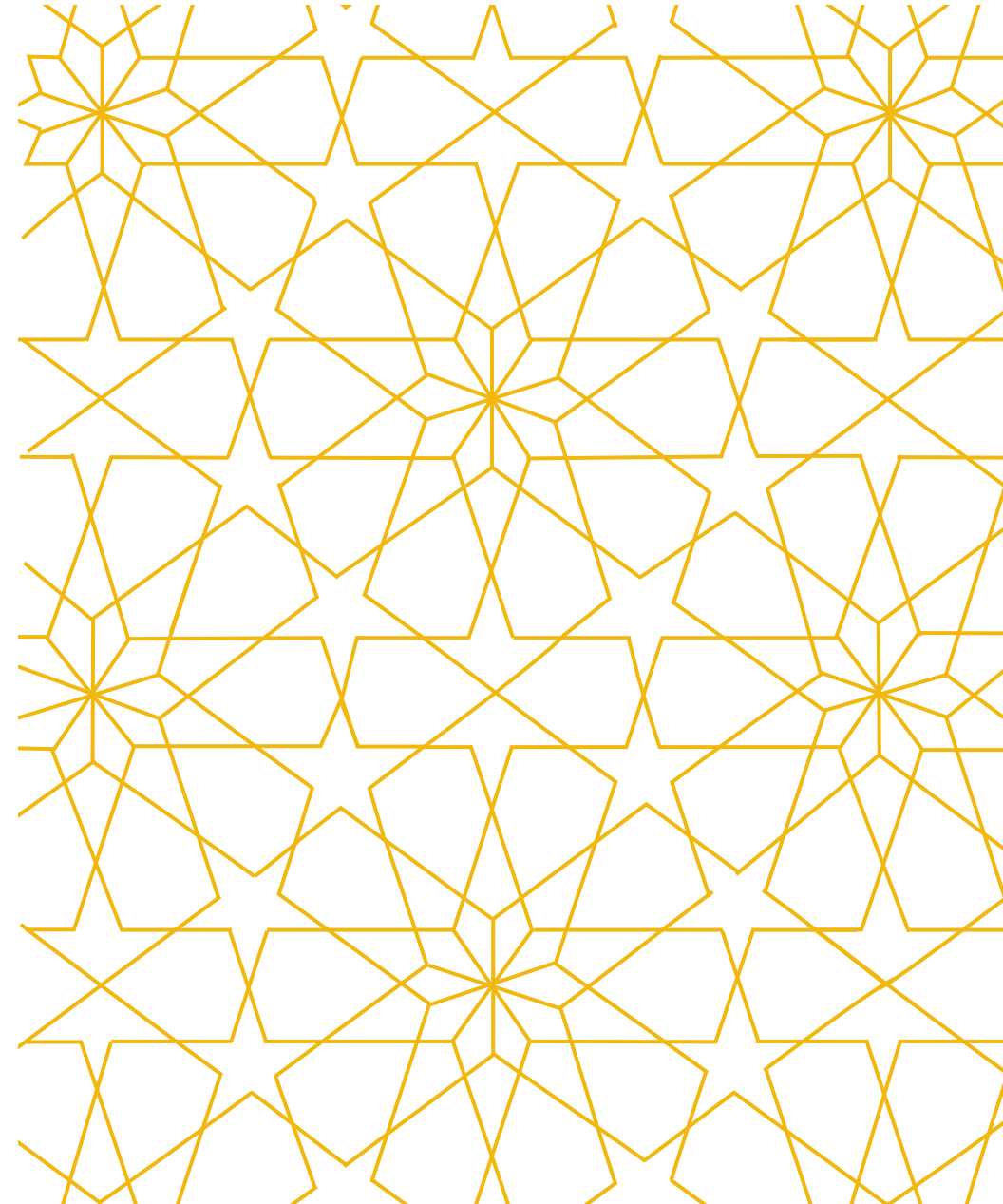


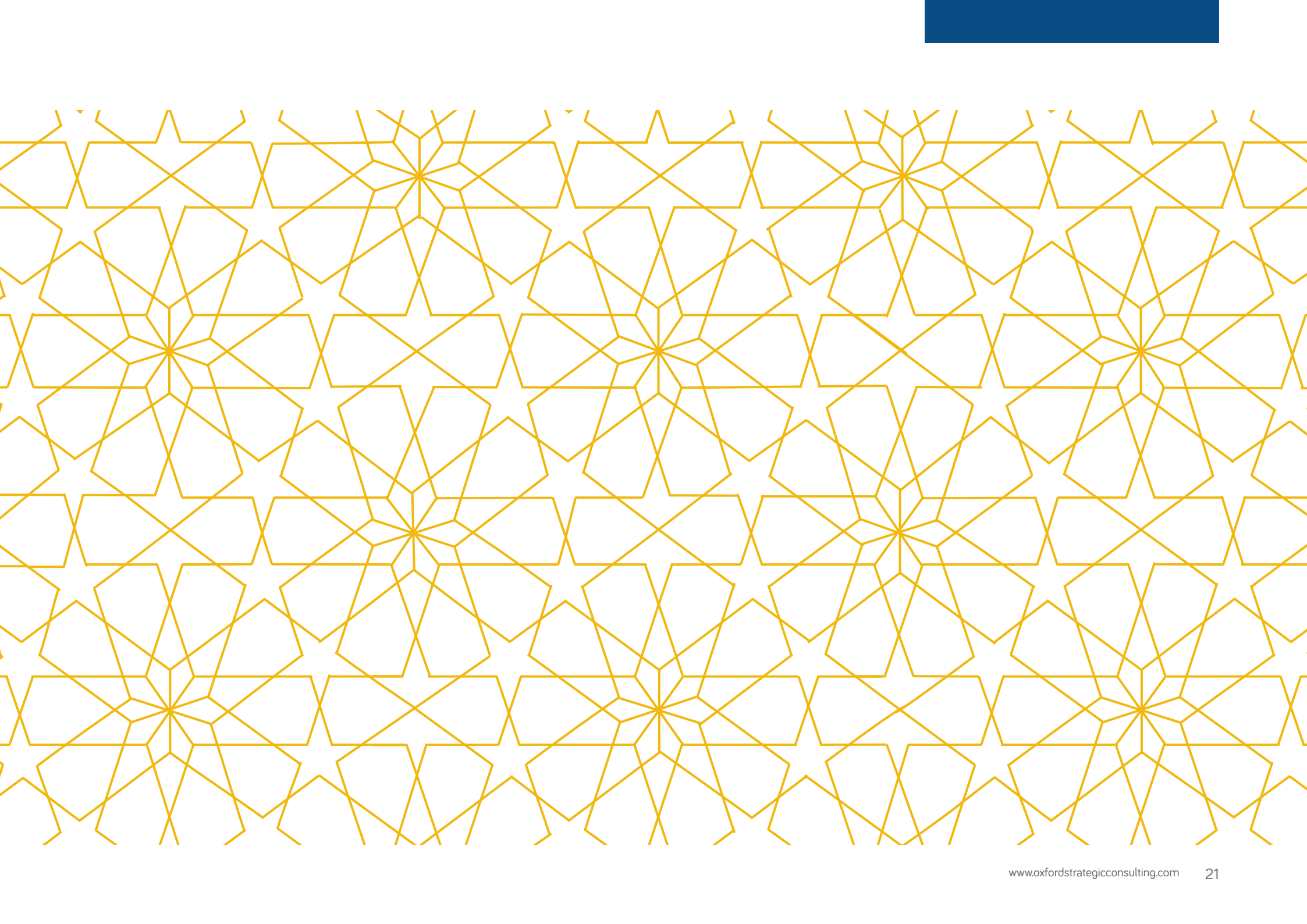
Top-line Insights

Over half of respondents (52%) felt it was very (25%) or fairly easy (27%) for a Qatari national to find a job. A further 41% felt it was neither easy nor difficult and only 6% felt it was difficult.

Demographic Insights

Males were significantly more likely than females to think it was very easy for a Qatari national to find a job (31% vs. 19%).

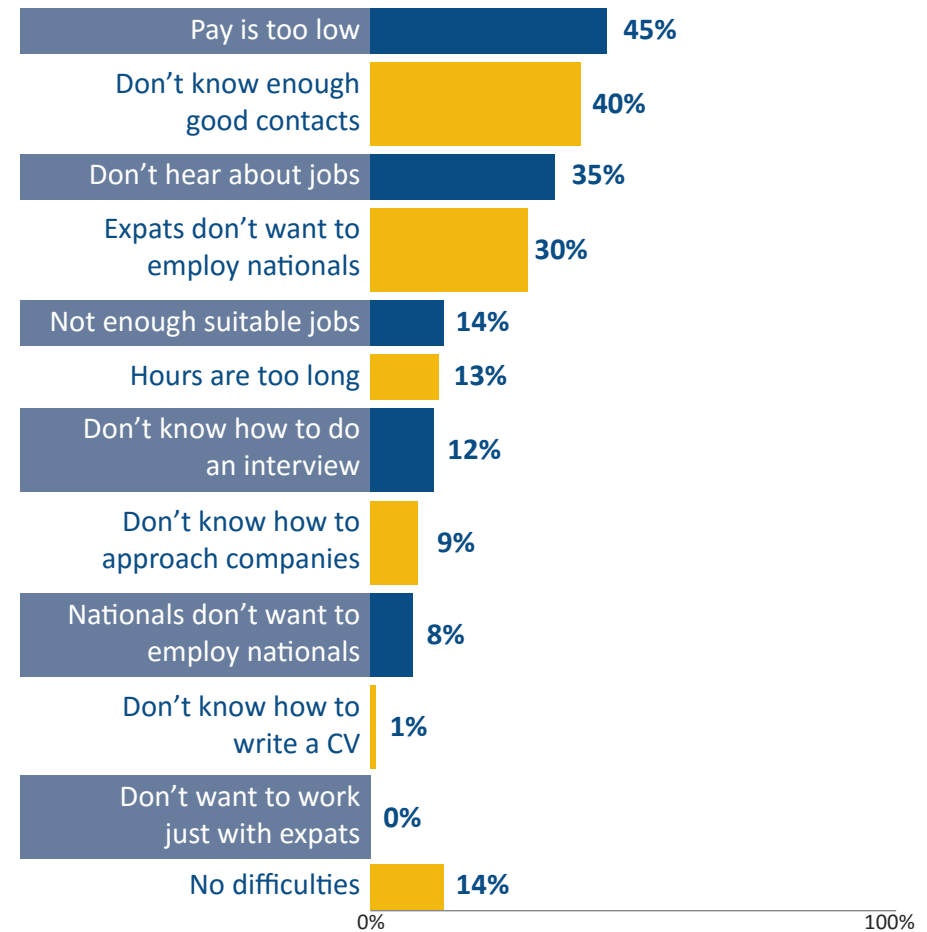




Difficulty Sourcing Employment

Respondents were asked to select any difficulties Qataris face in finding jobs. They were allowed to select as many difficulties as they wanted.

What difficulties (if any) do Qataris face finding jobs?



Top-line Insights

The three main difficulties Qatari nationals faced when finding jobs were low pay (45%), lack of contacts (40%) and not hearing about jobs (35%).

A further three out of ten felt expats did not want to employ nationals (30%).

Demographic Insights

Males were significantly more likely to select lack of contacts (48% vs. 30%), expats not wanting to employ nationals (39% vs. 19%), not knowing how to do an interview (16% vs. 8%), not knowing how to approach companies for jobs (15% vs. 3%). They were also significantly more likely to feel there were no difficulties (20% vs. 6%).

Females were significantly more likely to select low pay (58% vs. 35%), not hearing about jobs (44% vs. 27%), lack of suitable jobs (22% vs. 7%), long hours (25% vs. 2%) and nationals not wanting to employ nationals (12% vs. 5%).

Gen Z (16-21 Years) were significantly more likely than Gen Y (22-29 Years) to feel the main difficulty in finding a job was not knowing how to do an interview (16% vs. 8%).

Those working full or part-time were significantly more likely to select not hearing about jobs (46% vs. 28%) and long hours (18% vs. 9%). Whereas students were significantly more likely to select expats not wanting to employ nationals (34% vs. 23%), not knowing how to do an interview (16% vs. 5%) and not knowing how to approach companies for jobs (13% vs. 4%).

Analysis



Learning to Lead

The exceptional population demographics in Qatar essentially means that there is a shortage of Qatari talent within the country. Rather than view this shortage as a disadvantage, Oxford Strategic Consulting believes that there is a great source of untapped leadership potential. Oxford research found that nearly 80% of Qataris would need to become leaders if all of the business and strategic leadership roles in the country were held by national citizens.

Oxford recommends that all Qataris, and especially women, have access to globally recognised leadership development training and programmes. Not all Qataris will want to become business and strategic leaders – and that is fine. Yet, it is critical for the country that most Qataris assume leadership roles.

Finding the Right Employment for Qataris

Selecting the right career is critical for young Qataris, particularly given the increasingly higher levels of education and advanced qualifications held by Qatari nationals. Our survey found that women are significantly more pessimistic than men about how difficult it is for a national to get a job in Qatar.¹ Conversely, men are more than 4 times as likely to consider low pay as a significant difficulty faced by Qataris when trying to find jobs.²

Qataris are selective when choosing employment that best suits their qualifications, aspirations and suitability. To address these particular employment needs, Oxford Strategic Consulting recommends that recruiters, graduate schemes and industries take the time to perform skill assessments to ensure that young Qataris are fit for their chosen roles.

Qataris, especially females, may also need additional schooling on how to attain their ideal job role. The results of this survey found that female Qataris are more than 3 times as likely to consider ‘not knowing how to apply for a job’ to be a significant difficulty when trying to find suitable employment.³ This finding could provide valuable insight for industries and recruiters alike as they streamline recruitment campaigns and initiatives to attract more women. Moreover, targeted job-search assistance can help highly educated females attain their dream jobs.

1 Test: t test: $t(298) = 4.254$, $p < .001$, $r = .239$.

2 Test: Chi square(1) = 22.153, $p < .001$, Odds Ratio = 4.49.

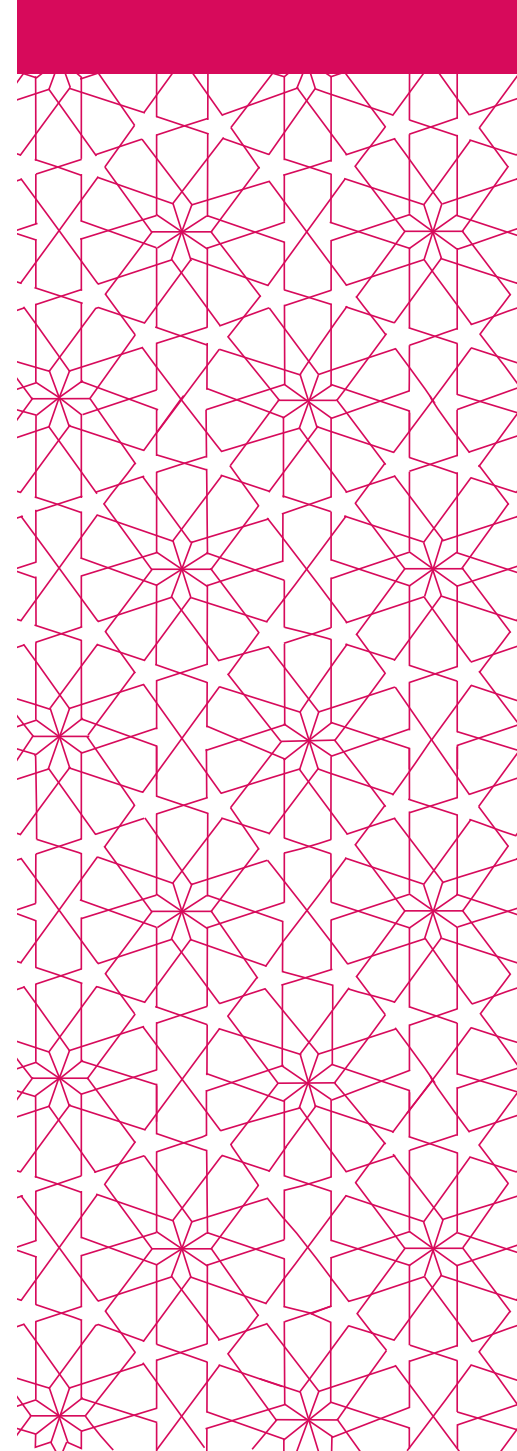
3 Test: Chi Square(1) = 10.312, $p < .01$, Odds Ratio = 3.11.

Qatari Motivations

While Qataris are motivated by money and wages, they are just as motivated by contributing to country and society (57%) as well as work/life balance (44%) and making their family proud (43%). As a result, there is a range of motivations beyond money that employers can tap into when sourcing Qatari candidates for roles. However, these employers must understand that Qataris are motivated in large part by responsibility to their family, society and country. And these great responsibilities will be paramount when Qataris decide on future job roles.

Employers in turn can help align job roles with Qatari motivations in order to increase engagement, an individual's commitment to their work. Here, employers could clearly highlight how positions contribute to key country goals and national development in the job description. Similarly, employers could build more opportunities for community outreach into roles for nationals, as Qataris view contributing to society and making their family proud as key motivations. Any initiatives that increase engagement will in turn reduce levels of attrition found in the workplace.

Recent research on the Gulf Arab Leadership Style found that it can produce engagement levels of 80% within organisations – a significant achievement given that global engagement scores average a modest 25%. The Gulf Arab Leadership Style should be promoted and taught as an additional management skill for Qataris to leverage in the workplace.







Qatari Military & Police

Qataris are significantly more likely to want to work in military and defence roles, with 57% of Qataris listing the police or the military as their ideal roles. These results are unsurprising considering that Qataris are highly motivated by contributing to society and country. This preference for military and defence roles is also likely to be connected to the prestige and stability of roles in this sector.

Military and defence roles, especially leadership roles, should be held by Qataris. While expats play a pivotal role in many parts of the Qatari economy, it is of national interest for Qataris to control this strategic sector. On that note, more can be done to provide flexible service options for Qataris interested in some type of military service, while still allowing these citizens to hold full-time jobs outside of the military. Similar options should exist within various police departments as these active government roles are clearly connected to national interests and reflect a high degree of responsibility.



Entrepreneurism & Industry Insights

Qataris have an appetite for entrepreneurship, and these ambitions should be encouraged through smart, targeted funding. Approximately 41% of Qataris surveyed listed 'running their own business' as their ideal role in the future. This bodes well for increasing employment opportunities in Qatar through SME development. Both private and public sectors should provide entrepreneurial training, youth enterprise schemes and funding to promote risk-taking and innovative start-ups.

Yet support for entrepreneurs must be targeted to those most likely to contribute to employment growth. Most start-ups fail, and those SMEs that survive tend not to make significant contributions to employment. In order to maximise the investment in entrepreneurship, high-potential entrepreneurs who actually contribute to employment growth, known as 'gazelles' should be identified and supported by the private and public sectors. Providing seed funding and early support for high-potential Qatari entrepreneurs is much more cost-effective than employing the equivalent public sector employees for an entire career in the government.

Outside of entrepreneurship, women are 5 times more likely than men to aspire to a career in the medical profession.⁴ The large number of Qatari females interested in the healthcare industry contrasts with a dwindling number of females entering the medical profession in the West, and this has educational implications for universities world-wide. Healthcare is a critical industry for the health of the nation, and employers in this industry can utilise the large population of employable Qatari females eager to work in healthcare.

⁴ Test: Chi Square(1) = 10.312, $p < .01$, Odds Ratio = 3.11.

Perception of the Public and Private Sectors

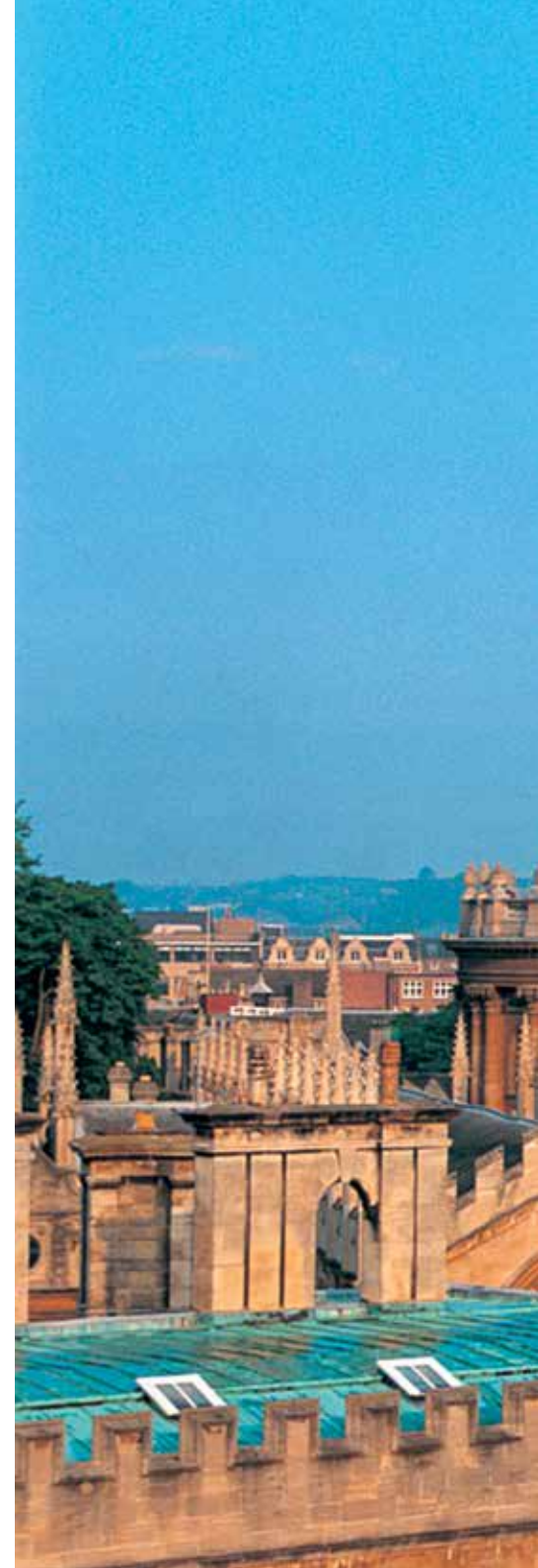
In contrast to widely-held notions about public sector preferences in Qatar, 27% of respondents ranked the public sector as the least preferable industry to work – higher than any other industry mentioned. This represents a stark contrast with neighbouring GCC countries, where the respective surveys revealed persisting and deep preferences for public sector roles. While there remains strong demand for public sector positions in Qatar, these findings reveal a growing constituency of Qataris moving away from the public sector all together.

Is this a reflection of Qatar's transition to a knowledge society that does not want to rely on the government? Or has the private sector in Qatar offered particular advantages to Qatari citizens that do not exist in other countries? Qatar is clearly doing something right to expand the employment preferences of Qatari citizens and promote a healthier labour market. This success needs to be further analysed and shared with neighbouring GCC countries.

Contact & inquiries

For additional information about the survey findings and analyses in this report, or to learn more about Oxford Strategic Consulting's other research on Nationalisation in Qatar, please contact Robert Mogielnicki at robert.mogielnicki@oxfordstrategicconsulting.com.

For more insights, publications and services related to HR in the GCC, please visit www.oxfordstrategicconsulting.com.





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