



Middle East Workforce

Hopes and Fears

Survey 2022

What 1,565 people in the region think
about work today



pwc.com/me/hopes-and-fears



Introduction

Workers have been living with almost constant volatility over the past two years – first as a result of Covid-19 and then the rebound, with rapid transformation and technological change all contributing to people’s uncertainty about the future. Amid so much change, employees are thinking more carefully than ever about their career: **“Is it fulfilling and are the company’s values in tune with my own?”** Questions such as these are being asked more frequently, with around 30% of Middle East respondents saying they were ‘extremely likely’ or ‘very likely’ to look for a new job in the next year, compared with a global survey average of 19%.

Organisations need a strong and capable workforce in order to grow. In practical terms, that means fostering organisational transparency, enhancing workers’ skills, improving productivity and taking steps to retain top talent. Across our region, organisations are responding by upskilling employees to close the skills gap and by taking greater care of their mental and physical wellbeing. Employers are looking at new ways to build trust and retain employees, acknowledging that ways of working and people’s expectations about the working environment have changed forever.

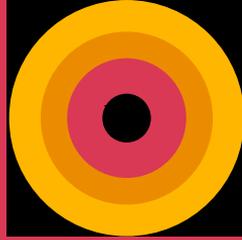


About the survey

For the third year running, we have captured the sentiments of the workforce across the region in our Middle East Hopes and Fears Survey. From our global survey of 52,000 respondents across 44 countries and territories, we focus here on the findings from 1,565 workers.



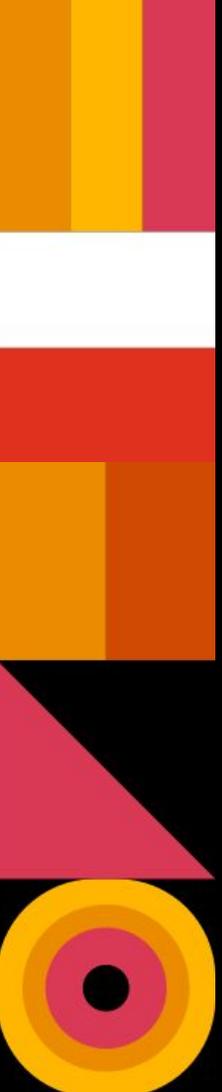
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Explore our key themes

We have identified six key themes emerging from our survey results. These are around – encouraging conversations at work, designing retention strategies, meeting societal goals, and adapting hybrid work models.



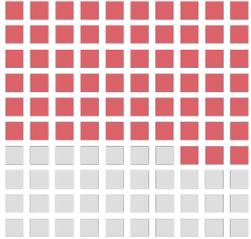
Flexibility is
important

01

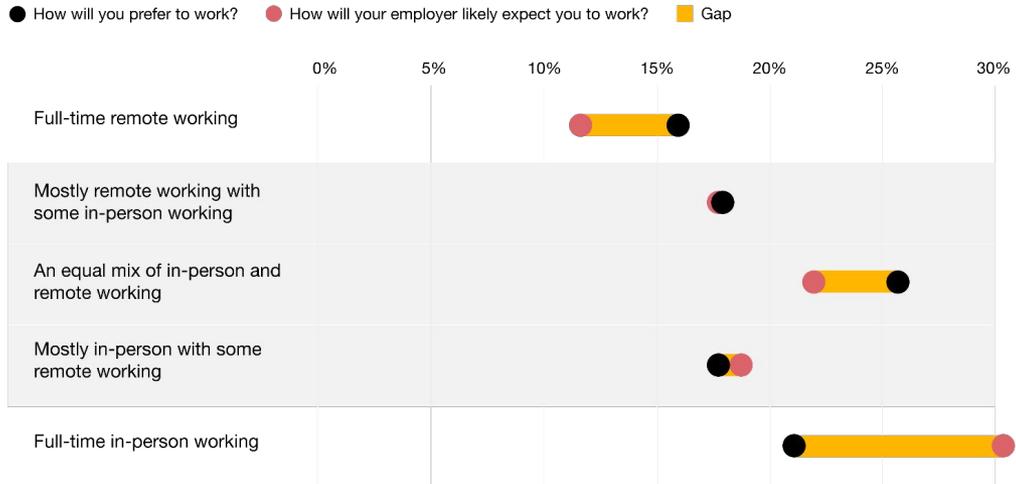
Younger employees have a stronger preference for full-time remote and hybrid working arrangements

Flexibility makes hybrid work models succeed - Middle East

63% of respondents are able to work remotely



Employee expectations for their current job roles 12 months from now



Source: PwC's 2022 Middle East Workforce Hopes and Fears Survey of 1,565 workers across 4 countries

Younger employees have a stronger preference for full-time remote and hybrid working arrangements

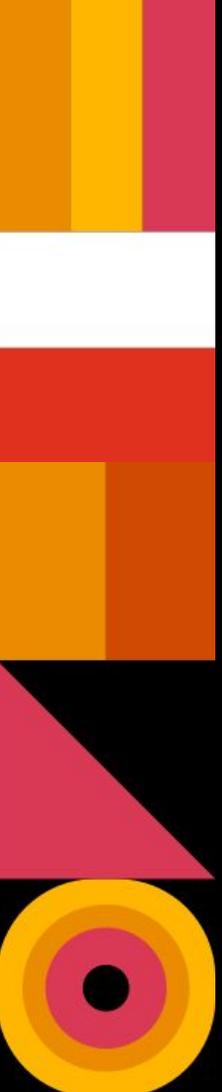
Coming out of the pandemic, 63% of respondents said they were capable of performing their job remotely. Yet almost three out of 10 (28%), more than double the global average, said they were working full-time in-person, highlighting the complexity of adjusting work models to suit all employees.

The potential mismatch between employees' and employers' expectations is evident in the Middle East, where 31% of employees surveyed, compared with 18% globally, said their companies wanted them to work full-time in-person. Across all demographics, only 23% stated that this was their preferred method of working.

Furthermore, the younger the workforce, the stronger the preference for hybrid or fully remote working models. For example, 43% of Gen Z respondents in the Middle East preferred a remote or mostly remote full-time arrangement, with only 15% opting for full-time working in the office or other workplaces. Employers in the Middle East should also take note that these 18 to 25 year olds – the workforce of the future – behave rather differently at work than their older colleagues.

However, the value of a face-to-face presence is still felt in our region, as respondents who work full-time in-person were least likely to feel overlooked for career advancement. Employers need to address this gap in remote working preferences, while considering how to manage and fairly recognise their workforce in an increasingly hybrid world.





Promoting open
discussions
at work

02

Employees feel comfortable discussing societal and contemporary topics

In line with their global counterparts, 86% of all respondents in the Middle East had conversations with other employees about societal and contemporary issues on occasion, allowing them to better understand their colleagues (43%) and create a more open and inclusive work environment (36%). Furthermore, having these conversations made employees in the region feel more confident in sharing their views (37% vs 27% globally), and the impacts of having these discussions in the workplace were twice as likely to be positive than negative.

Findings from last year's Middle East Hopes and Fears Survey indicated that many organisations were receptive to genuine, fully inclusive conversations about how to build more diverse and purpose-led workplaces. While employees overall feel empowered to have more open discussions, there is still some progress to be made. Of the employees in our region who 'never' engaged in such discussions, 24% stated this was due to their company discouraging conversations of this nature – double the global response at 12%.

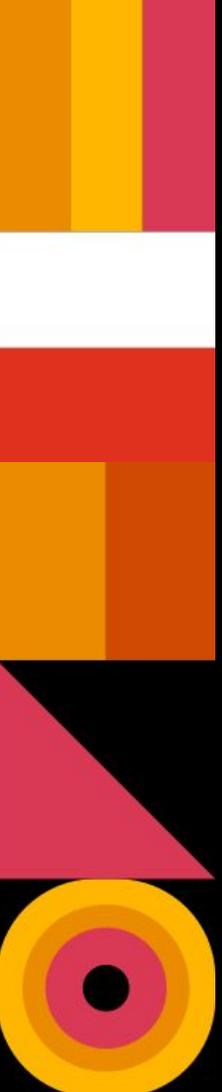


Employees feel comfortable discussing societal and contemporary topics

The positive impact of having open conversations with colleagues at work (% of respondents)



Source: PwC's 2022 Middle East Workforce Hopes and Fears Survey of 1,565 workers across 4 countries

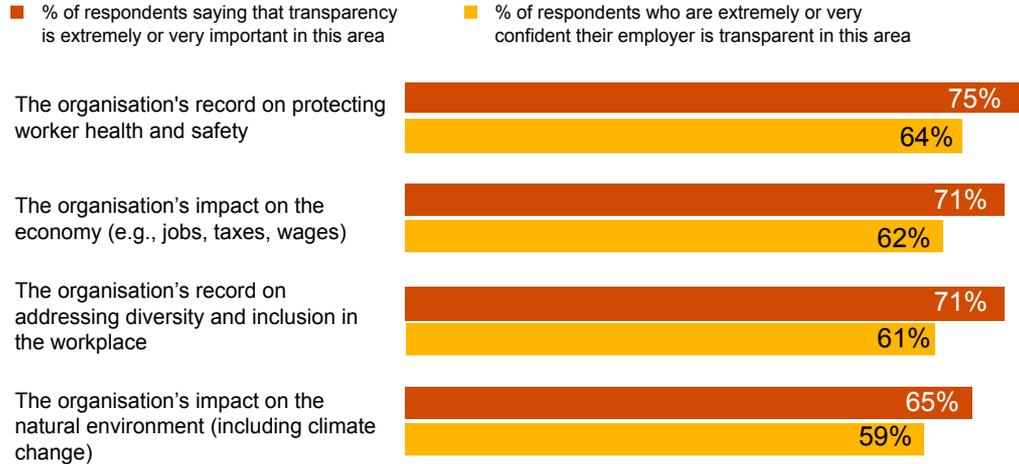


Building trust &
transparency
is essential

03

Employers are more transparent about workplace health and safety, diversity and inclusion and economic and environmental impacts

In company disclosures, safety and social issues outweigh climate change



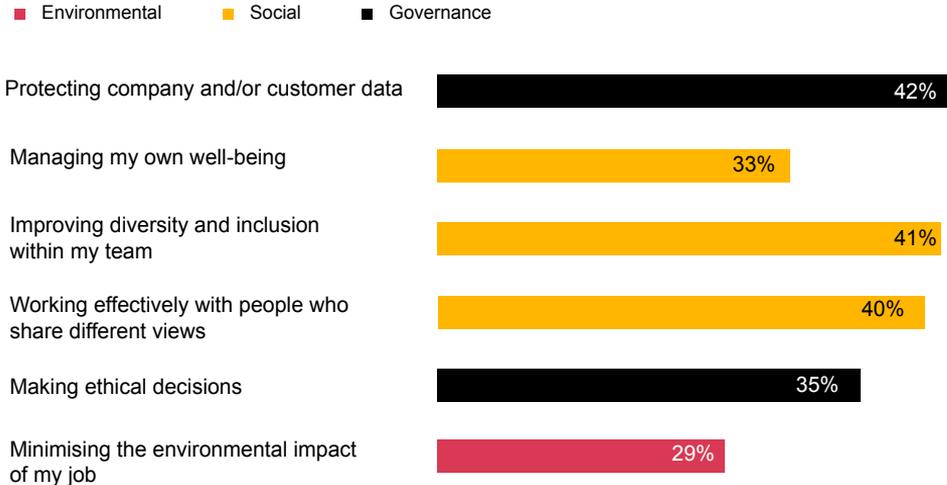
Proportionately more respondents in the Middle East than globally believed that their employers were more transparent about workplace health and safety (64% vs 54%), diversity and inclusion (61% vs 49%) and economic and environmental impacts (62% vs 50%). An even higher proportion of regional respondents (71% vs 58% globally) stressed the importance of transparency by employers on these issues.

Source: PwC's 2022 Middle East Workforce Hopes and Fears Survey of 1,565 workers across 4 countries

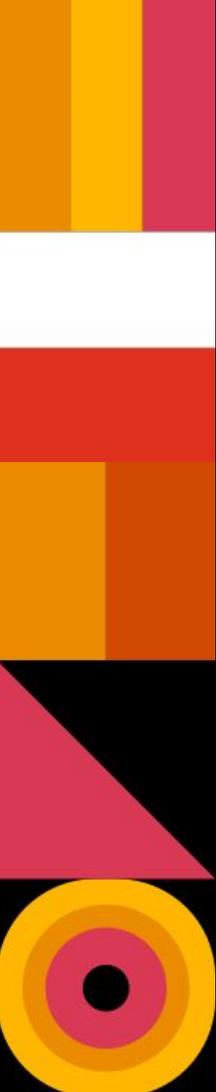
Employers are providing more support in the areas of Social and Governance

In this context, it is worth noting that on ESG issues, employees in the Middle East felt they were given more support and resources with regard to governance and social matters, in areas such as protecting company and customer data, diversity and inclusion and wellbeing, than on environmental matters. It is relevant that, according to this year's Middle East CEO Survey, only 5% of business leaders in the region have committed to Net Zero targets.

Has your employer provided support and resources to help you with any of the following? (% of respondents)



Source: PwC's 2022 Middle East Workforce Hopes and Fears Survey of 1,565 workers across 4 countries



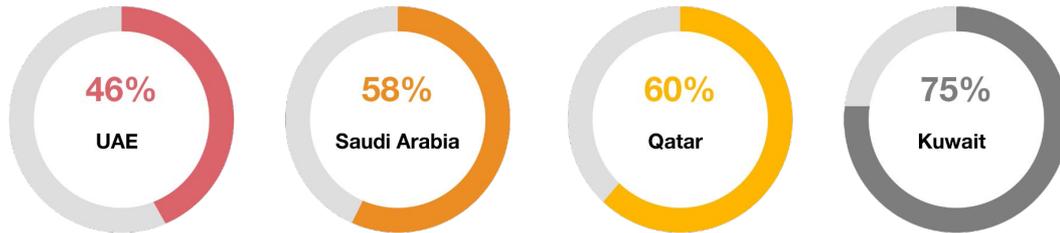
Closing the skills gap

04

To address skills shortages, many employers are focusing on internal measures

Some 75% of the employees surveyed in Kuwait, 60% in Qatar, 58% in Saudi Arabia and 46% in the UAE believed their country had a shortage of people with specialised skills. However, respondents in the region were more confident than the global survey average (47% vs 40% globally) that their employers were prioritising upskilling. This is consistent with the latest [Middle East CEO Survey](#), where almost half the respondents said they were planning double-digit investments in leadership and skills over the next three years. Also, several recent initiatives underscore the commitment by Middle Eastern governments to support employers in equipping employees for increasingly digitalised workplaces, as part of the regional drive to create highly skilled digital economies.

Respondents who believe their country has a shortage of people with specialised skills



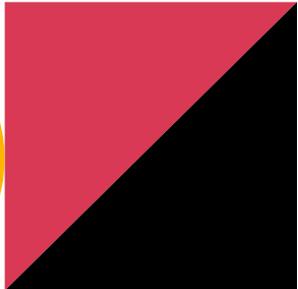
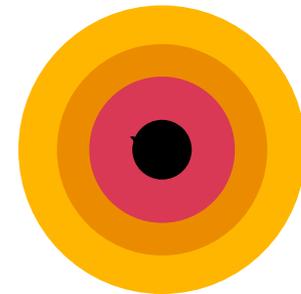
Source: PwC's 2022 Middle East Workforce Hopes and Fears Survey of 1,565 workers across 4 countries

To address skills shortages, many employers are focusing on internal measures

It is also encouraging that 38% of respondents in the Middle East, slightly more than the global average, said their companies had increased salaries as a retention strategy to retain skilled workers. This may reflect the increasing tendency of employers, especially in Saudi Arabia and the UAE, to raise salaries rather than hire scarce and therefore expensive foreign talent to address skills and labour shortages.

Against this background, 32% of employees in the Middle East said their companies were using technology to automate and upgrade the workplace, slightly more than the global survey average, while 41% compared with 30% globally were worried about their jobs being replaced by new technologies over the next three years. It is therefore concerning that 53% of respondents in the region (vs 40% globally) reported that there were limited opportunities to learn from colleagues with advanced technical or digital skills.

Clearly employers in the Middle East, like their global counterparts, need to implement new technologies judiciously, remaining sensitive to these anxieties. The best way to resolve them is to build loyalty and trust by investing in upskilling programmes, for which there will be no shortage of participants. Any employer who is in doubt should take on board the following finding: more than 60% of respondents in the Middle East said some kind of specialist training was a necessity in their jobs, substantially higher than the global average (48%).

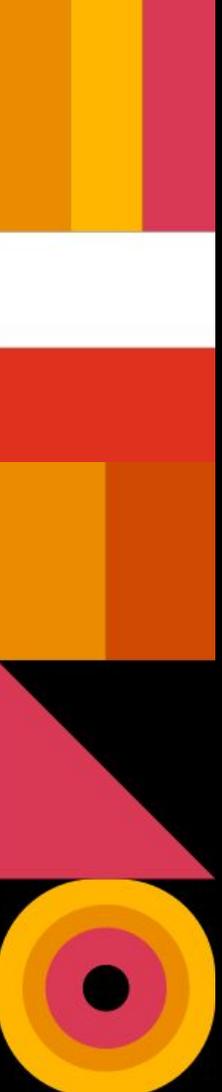


To address skills shortages, many employers are focusing on internal measures

Actions employers are taking to address skills and labour shortages (% of respondents)



Source: PwC's 2022 Middle East Workforce Hopes and Fears Survey of 1,565 workers across 4 countries



Pay and
promotion

05

Employees are confident asking for recognition

When it comes to asking for a pay rise, respondents in the Middle East (54% vs 35% globally) were more likely to do so than their international counterparts, while 54% were extremely or very likely to ask for a promotion, almost double the global average. Across the region, millennials were the most likely age group to do both, or leave to seek new employment.

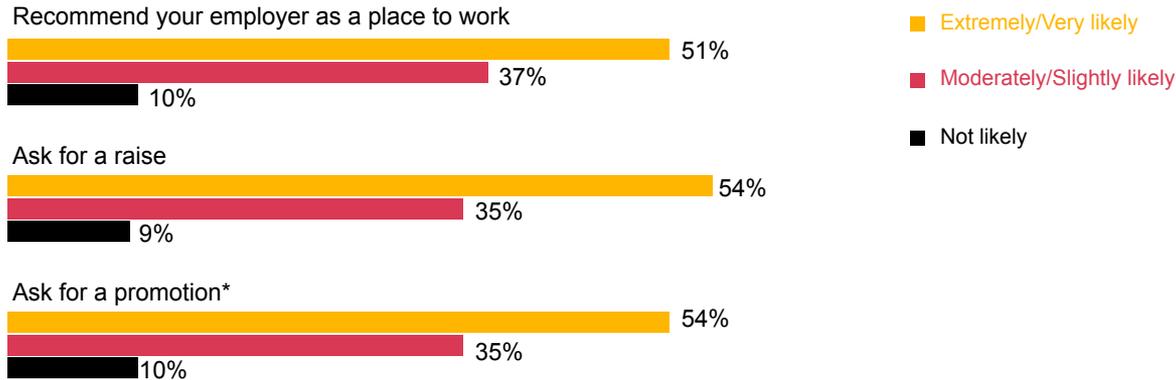
How to explain their relative self-confidence? To some extent, it may reflect the region's accelerating transformation. Despite the uncertain global economic outlook, growth – and therefore jobs – has returned to the Middle East. Furthermore, younger employees across the region have directly benefited in recent years from the massive investments made by governments and employers in ICT training and education. Many of them are highly employable and, as we discuss below, share a youthful mindset in which job-hopping is regarded as entirely normal.

Lastly, some younger Middle East employees evidently had a positive view of their employers' openness to their demands. It is striking, for example, that among Qatari respondents, "recommending your employer as a place to work" featured more prominently than asking for a wage increase or a promotion.



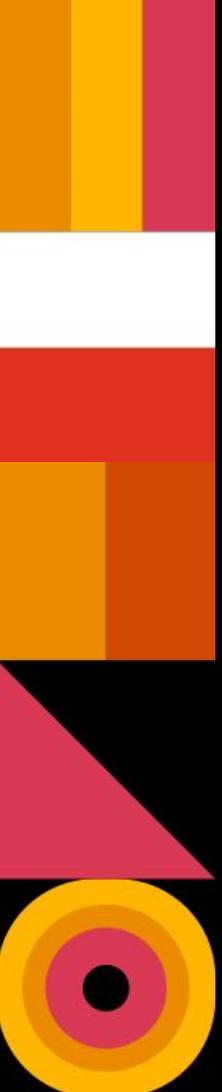
Employees are confident asking for recognition

How likely people are to take the following actions in the workplace (% of respondents)



*Please note "Ask for a promotion" was not asked to those respondents who selected CEO as their job role
Source: PwC's 2022 Middle East Workforce Hopes and Fears Survey of 1,565 workers across 4 countries

Scarcity of skills also plays a part in triggering these workplace actions. Employees in the Middle East who believed their skills to be in short supply were generally more likely to feel listened to by managers, to ask for a pay rise in the coming year, be satisfied with their job, request a promotion and recommend their employer as a place to work.



Motivation to move roles

06

Employees are considering new opportunities

30% of respondents in the Middle East said they were extremely or very likely to look for a new job in the next year, a considerably higher proportion than the global survey average (19%). When we looked closer at the data on employees who said they were extremely or very likely to look for another job, we found this was particularly true of Gen Z and millennials across the region.

As noted above, the region's rapid tech-driven transformation helps account for the greater mobility of younger workers, with vacancies abounding for employees with the right digital skills. On a personal level, popular reasons for wishing to seek pastures new include job fulfilment and the opportunity to be themselves at work.

Most important factors when considering a job change % of respondents ¹



¹ Respondents who selected extremely important

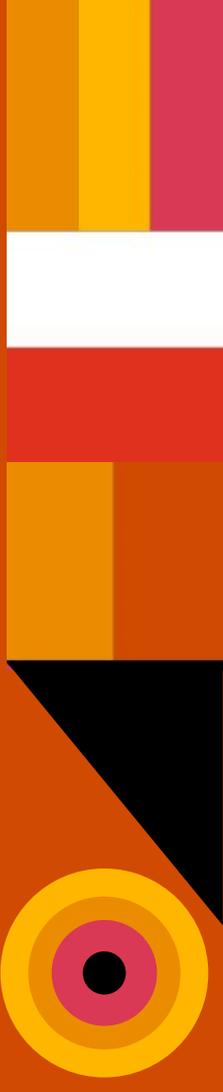
Source: PwC's 2022 Middle East Workforce Hopes and Fears Survey of 1,565 workers across 4 countries

Employees are considering new opportunities

It is notable that wellbeing at work matters more to Middle East respondents, compared with the survey as a whole; 35% thought it was 'extremely important' (vs 24% globally). At the same time, employees in the region were generally more ambitious than their international peers, with 35% saying that career advancement was 'extremely important', compared with a survey average of 22%.

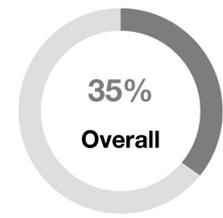
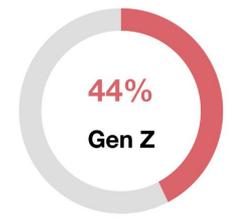
Overall, the findings are a wake-up call for managers and companies, which need to retain their brightest talent in an increasingly competitive environment where skills are at a premium. Amid the global phenomenon of 'the great resignation', employers must ensure they offer the best possible workplace for younger employees in particular to pursue financially and personally rewarding careers.

Gen Z employee snapshot

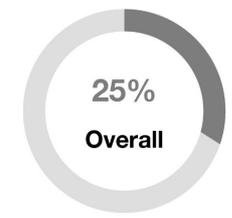
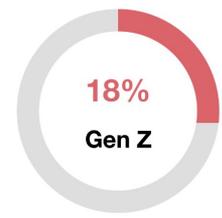


Top characteristics

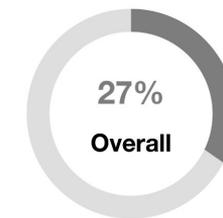
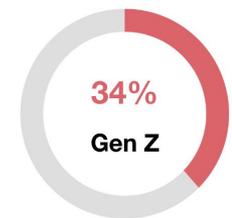
More concerned about support and resources provided by employers for making ethical decisions



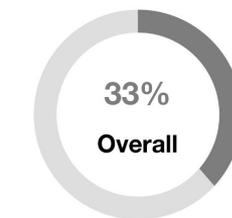
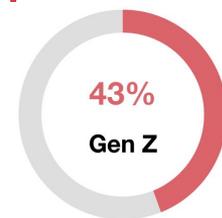
Less confident about employer transparency on addressing diversity and inclusion in the workplace



More likely to chat 'frequently' about social and contemporary issues with colleagues



Stronger preference for full time or mostly remote working arrangements



*Gen Z represents the 18-25 year old age demographic

**Overall represents Gen Z, Millennials, Gen X and Baby Boomers age demographic

Conclusion



Key takeaways and practical steps for senior leaders

The worldwide workforce trends identified in our survey, including the rise in hybrid working, demands for greater upskilling, increased employee empowerment and the need to build trust through greater transparency and purpose, are all having an impact on employers in the Middle East. Companies need to dig deep into their own employee data and listen closely to the hopes and fears of their workforce to tailor a strategy that will benefit employees and employers alike. Businesses must also be mindful that they are dealing with a new generation of young workers who can – and will – switch jobs if they feel other employers offer them more fulfilling opportunities.

In view of the survey findings, Middle East companies should take the following specific actions:

Identify the key drivers of employee turnover and retention

Use data to inform workplace strategies and tailor them to different employee segments

Align the company's strategic goals with the demands of employees for greater purpose and trust

Build an environment where employees are empowered to openly discuss their views

Commit to pay transparency and reinforce diversity and inclusion

Further support hybrid working

Invest more in upskilling to bridge the skills gap

By addressing the hopes and fears of their employees, employers can create the optimal working environment to ensure that their most valuable asset – the workforce – is fully engaged, motivated and able to achieve their full potential, now and into the future.

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Read more at: www.pwc.com/me/hopes-and-fears

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