

THE GCC PEOPLE PULSE

Q3 2026

The latest insights into the word on work

Trust holds. Strain returns after
the summer holidays. Views of
AI remain unsettled.



ABOUT THIS REPORT

EXE: Employee Experience Exchange and Ipsos launched the GCC People Pulse: Word on Work in June 2026, the region's first dedicated monthly workforce sentiment tracker.

The GCC is navigating unprecedented change, from Vision 2030 and AI disruption to geopolitical instability and evolving labour markets. Yet most organisations are still relying on assumptions about what their people think. The GCC People Pulse replaces assumption with evidence.

Each month, employees across the GCC answer the same core questions. Wave 01 established the baseline in June. This report, Wave 02, combines the July, August and September waves and, for the first time, shows how workforce sentiment is shifting and where it is holding steady.

This quarter, the tracker has also expanded to include ten new questions on how employees use AI at work and how they feel about its role in recruitment.

REAL DATA.
REAL PEOPLE.
REAL CHANGE.



METHODOLOGY

WAVE 02: Q3 2026

The **GCC People Pulse** is a monthly workforce sentiment tracker conducted by **EXE: Employee Experience Exchange**, in partnership with **Ipsos**. Q3 results combine three monthly waves of online fieldwork: July (n=500), August (n=500) and September (n=700), a total of 1,700 employees across the UAE, Saudi Arabia, Kuwait and Qatar.

Respondents were adults in full-time or part-time employment at the time of fieldwork. Changes are shown against Q2 (June, n=1,500). The 11 core questions are asked every month. New for Q3: ten questions on AI at work and in recruitment, plus a question on role.

Core questions:

- 1 I would recommend my organisation as a great place to work
- 2 Leaders in my organisation do what they say they will
- 3 I feel confident about the future direction of my organisation
- 4 In recent months, I have felt under constant strain at work
- 5 I feel able to be myself at my organisation
- 6 My organisation demonstrates visible commitment to the country's nationalisation agenda
- 7 When changes are planned at my organisation, I feel involved and am prepared for the change
- 8 I plan to stay working for my employer for the next three or more years
- 9 My organisation encourages open and honest feedback
- 10 I believe that AI will make my organisation more competitive
- 11 I am concerned about the impact of AI on my job security

Focus on AI (September, n=700):

- 12 My organisation is helping me build the AI skills I need to succeed in my role
- 13 How often do you use AI tools provided by your organisation?
- 14 I am clear about when and how I am expected to use AI at work
- 15 Openness to AI being used in the hiring process
- 16 I would be comfortable with my initial job application being screened by AI
- 17 I would be comfortable with the final decision in my job application being taken by AI
- 18 I would participate in a first-round / screening interview conducted by an AI agent
- 19 I would be less likely to apply for a job at a company that uses AI to make hiring choices
- 20 I would withdraw from a recruitment process if I discovered my application was being decided by AI
- 21 I trust AI to evaluate my job application fairly

Respondent demographic breakdown:

COUNTRY

- **KSA** = 41%
- **UAE** = 41%
- **Qatar** = 9%
- **Kuwait** = 9%

AGE

- **18-34** = 54%
- **35-49** = 41%
- **50+** = 5%

NATIONALITY

- **Local** = 42%
- **Arab expat** = 25%
- **Asian** = 27%
- **Western/other** = 6%

GENDER

- **Female** = 46%
- **Male** = 54%

KEY FINDINGS (OVERVIEW)

1

STRAIN IS THE REGION'S MOST VOLATILE RISK.

51% of employees report constant strain at work

Strain was the only measure to show a significant change this quarter, increasing from a low of 46% in July to 52% in September. Employees concerned are considerably more likely to report strain (65% vs 38%).

2

EMPLOYEES ACCEPT AI SUPPORT, NOT AI AUTHORITY.

44% of employees would be comfortable with AI making a final hiring decision

Acceptance is higher for AI-led screening interviews (59%). Senior leaders are twice as comfortable as team members with AI making final hiring decisions (67% vs 33%). More than two in five (42%) employees would fully withdraw from a process if they found out it was being decided by AI.

3

THE FRONT LINE RISKS BEING LEFT BEHIND.

20-point gap in advocacy between senior leaders and team members

Team members are also more than twice as likely as senior leaders to say they intend to leave their organisation within two years (28% vs 12%).

4

CLARITY AND CAPABILITY DRIVE AI ADOPTION.

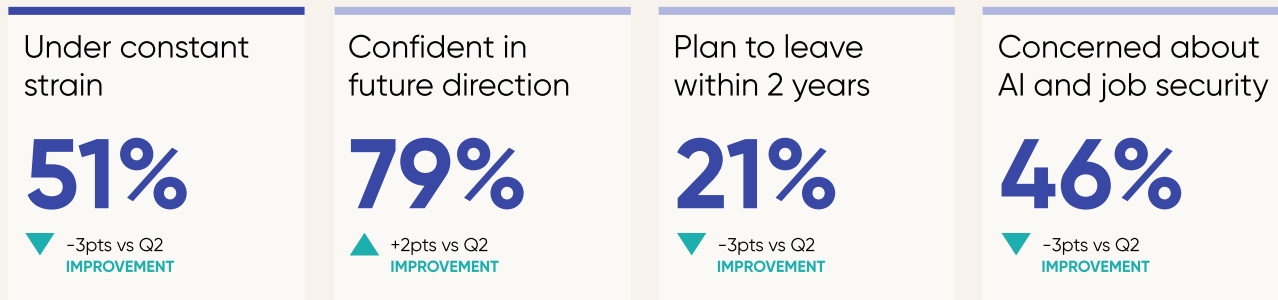
71% use AI weekly when they are clear on its use and supported to build skills

While 77% of employees are clear on how AI should be used, only 63% are being supported to build the skills to use it. Closing this capability gap is key to accelerating adoption.

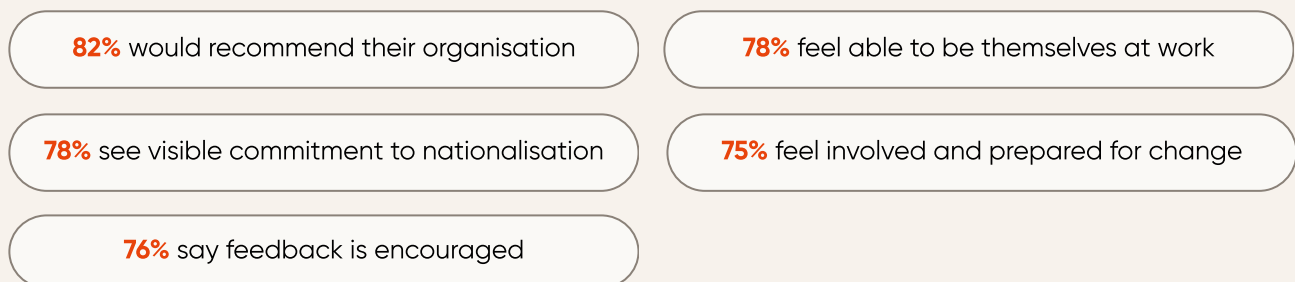
KEY FINDINGS (Q2 VS Q3)

Four measures improved this quarter. The remainder of the employee experience held steady.

Where sentiment improved:



Where sentiment held steady:



What this means



All four movements since Q2 are positive, though only the fall in strain is statistically significant. Strain and AI concern were also the most volatile measures month to month, while advocacy, confidence and trust in leadership stayed within a stable range.

Why this matters



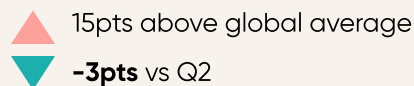
Stability in core measures during a period of regional uncertainty and rapid AI adoption points to a resilient foundation. The volatility of strain points to the opposite: a measure that can shift within weeks and should be tracked closely alongside the more stable indicators.

STRAIN IS THE REGION'S MOST VOLATILE RISK.

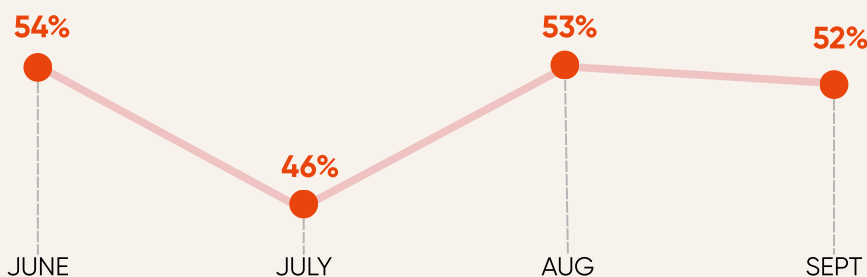
Strain fell to 51% this quarter, with the UAE recording the largest decrease (-7pts).



of employees report feeling under constant strain at work



Employees under constant strain, by month:



Except where otherwise stated, base for all data is: n=1,700

What this means



Strain fell significantly from 54% in Q2, but swung between 46% and 53% month to month. Employees concerned about AI and job security are considerably more likely to report strain (65% vs 38%).



Why this matters

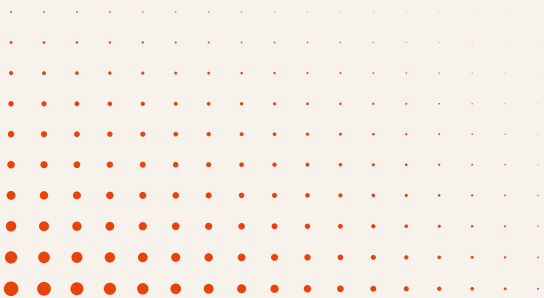


Strain is highly responsive to the wider environment, shifting with regional conditions, seasonal factors such as the summer holiday period, and concerns about AI and job security. This makes strain an important indicator of how employees are responding to changes around them, rather than simply an internal workplace measure. The level and volatility of strain highlight the need for regular monitoring and targeted support to identify emerging pressures before they affect wellbeing, engagement and retention.

-8 pts

decrease in strain among employees aged 18 to 34 since Q2, the largest improvement of any age group.

Base: 18-34 n=924 (Q2 n=755).



EMPLOYEES ACCEPT AI SUPPORT, NOT AI AUTHORITY.

Acceptance of AI declines as its role shifts from supporting hiring decisions to making them.

Acceptance of AI hiring (higher % = more accepting)

Comfortable with AI screening their application

Would take part in an AI screening interview

Trust AI to evaluate their application fairly

Comfortable with AI making the final decision

GCC	KSA	UAE	KUWAIT	QATAR
55%	59%	58%	42%	34%
59%	61%	61%	52%	36%
55%	61%	55%	46%	32%
44%	50%	44%	36%	16%

Resistance to AI hiring (higher % = more resistant)

Less likely to apply to an organisation using AI to decide

Would withdraw from a process if AI was deciding

GCC	KSA	UAE	KUWAIT	QATAR
49%	47%	51%	42%	48%
42%	44%	42%	46%	28%

What this means



Qatar-based employees are the most sceptical of AI. Yet once in a process, they are the least likely to withdraw (28% vs 42% across the GCC), even though nearly half (48%) would be less likely to apply in the first place.

Why this matters



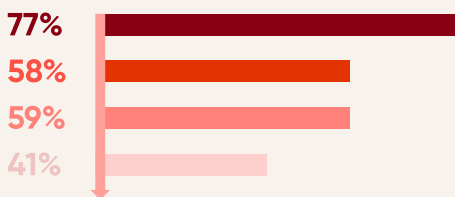
As AI moves from supporting recruitment to making career-defining decisions, organisations risk losing candidate trust and damaging their reputation as an employer. To avoid this, they will need to be transparent about where AI is used and ensure clear human accountability remains in place.

LEADERS TRUST AI MORE THAN THEIR PEOPLE DO.

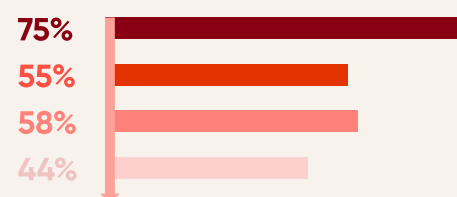
Comfort with AI making decisions about people increases with seniority.

■ Senior leader ■ Senior manager ■ People manager ■ Team member

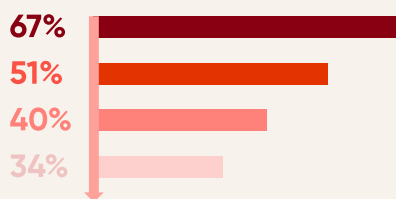
Comfortable with AI screening applications



Trust AI to evaluate applications fairly



Comfortable with AI making the final decision



What this means



Senior leaders are more comfortable with AI in recruitment, with managers sitting between the two.



Why this matters



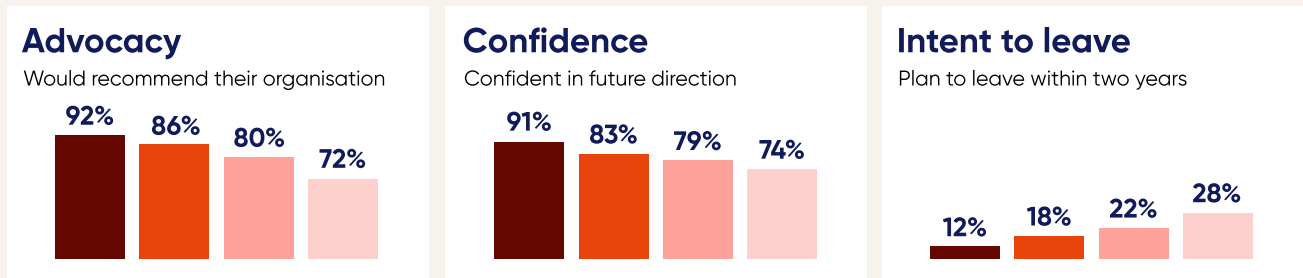
Those designing and approving AI-enabled processes are the most comfortable with the technology, while those most affected by it are the least. This is typically where resistance to adoption emerges. Successful implementation will depend less on the capability of the technology and more on clarity: when AI is used, how decisions are made, where human oversight remains and who is ultimately accountable.

THE FRONT LINE RISKS BEING LEFT BEHIND.

Team members trail senior leaders on every key measure, and are the most critical of how change is managed.

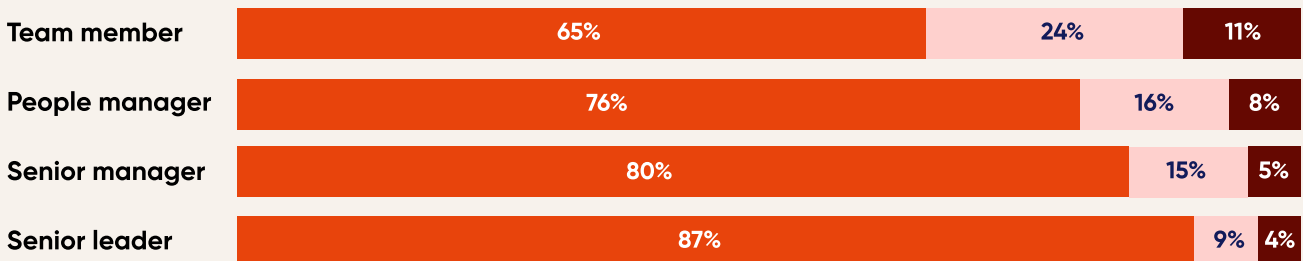
Key measures by level

Senior leader Senior manager People manager Team member



Involvement in change, by level

Feel involved and prepared Neutral Do not feel involved



What this means



Advocacy, confidence and intent to stay all weaken further down the organisation, and the gap is sharpest in change. Only 65% of team members feel involved and prepared, compared with 87% of senior leaders, and they are almost three times as likely to say they are not involved (11% vs 4%).

Why this matters



Ipsos research across more than 280,000 employees shows that organisational change has a significant impact on advocacy and psychological safety. Team members carry the greatest risk to both. Keeping employees informed and involved throughout change is critical.

1/4

of team members do not use AI at work at all.

compared to only

1/10

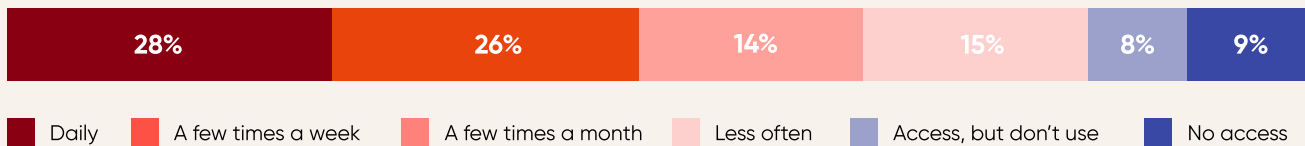
of senior leaders.



CLARITY AND CAPABILITY DRIVE AI ADOPTION.

83% of employees use AI tools provided by their employer, and more than half use them weekly. But adoption is uneven, and clarity plus capability make the difference.

How often employees use AI tools provided by their organisation



Employees using AI weekly or more, when they:

Are clear on how to use AI and are supported to build AI skills:



Have neither clarity or capability:

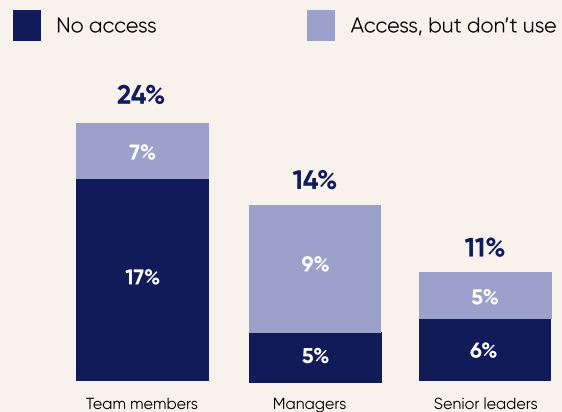


What this means



77% of employees are clear on how to use AI, and only 63% are supported to build the skills to use it. Employees with both clarity and skills support are almost four times as likely to use AI weekly. Non-use is highest among team members, one in four of whom do not use AI at all.

Employees not using AI at work:



Why this matters



Access alone does not drive adoption. At the front line, the barrier is access to AI tools; amongst managers, it is reluctance to use tools that are already available. In both cases, clarity and skills are key, but the needs differ across the organisation. Investing in capability, not just technology, is what turns AI from a source of concern into a source of competitive value.



32%

of Kuwait-based employees have no access to AI tools at work, more than three times the GCC average.

Base: Sept. 2026 (n=50). GCC total n=700



TRUST CONTINUES TO UNDERPIN ADVOCACY.

Advocacy, confidence and trust in leadership remained high and stable throughout the quarter.

82% ▲ +1pt vs Q2
▲ +10pts vs global avg.
▲ +1pt vs MENA avg.

would recommend their organisation as a great place to work

79% ▲ +2pts vs Q2
▲ +24pts vs global avg.
▲ +3pts vs MENA avg.

are confident about the future direction of their organisation

77% ▲ +2pts vs Q2
▲ +7 pts vs global avg.
▲ +5 pts vs MENA avg.

believe leaders do what they say they will

Employees planning to leave within two years when...

are confident in their organisation's direction



are not confident in their organisation's direction



What this means



Advocacy and confidence remain strong, with 82% recommending their organisation and 79% confident in its future.

Qatar saw the largest increase (+13 points to 79%), while Kuwait fell 5 points to 63%.

Employees who lack confidence are more than three times as likely to plan to leave (49% vs 14%).



Why this matters



Trust is not simply a sentiment measure. It is closely linked to the outcomes organisations care about most. Employees who are confident in their organisation's direction are significantly more likely to recommend it and to stay. The widening gap between markets means regional averages can mask real risk, so organisations operating across the GCC should look at each country separately rather than rely on a single regional picture.

Advocacy among employees who believe
leaders do what they say they will

94%

Advocacy among employees who do not

40%



ATTRITION: FEWER EYE THE EXIT. THE GAP IS WHO.

Intent to stay has risen to 79%. But the people most likely to leave are the ones organisations can least afford to lose.



of employees plan to stay working for their current employer for three years or more.

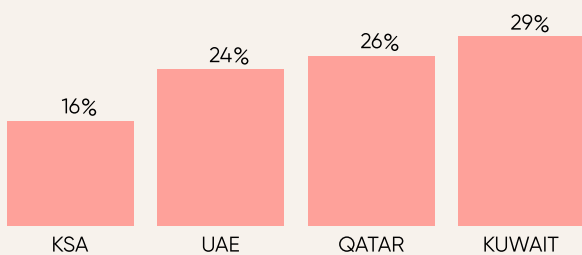
- ▲ +5pts above global average
- ▲ +1pt above MENA average
- ▲ +3pts vs Q2

What this means

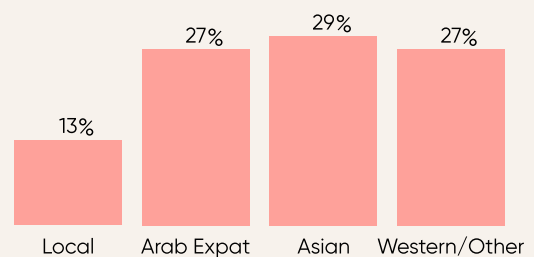


21% of employees plan to leave within two years, down from 24% in Q2. Intention to leave is more than twice as high among expat employees as among GCC nationals. By market, Kuwait has the highest proportion planning to leave and KSA the lowest.

BY COUNTRY



BY NATIONALITY



Why this matters



Intention to stay is a strong predictor of actual turnover. As nationalisation programmes progress, expat attrition risk can easily be overlooked, yet expat employees hold much of the region's specialist and operational capability. Confidence remains the clearest lever: employees who are confident in their organisation's direction are far more likely to stay.

28%

of team members plan to leave their organisation in the next two years.

More than double the rate among senior leaders (12%).



Base: September, team members n=227, senior leaders n=103.

LOOKING FORWARD

What you can do to stand out
from the crowd



WHAT YOU CAN DO

RIGHT NOW

01

Treat strain as a live metric.

Strain moved 7 points within a single month. Monitor it continuously and act as soon as it rises.

02

Define where AI stops.

Be explicit about where human judgement remains in hiring and people decisions.

03

Close the access gap on the front line.

17% of team members have no access to AI tools at work.

NEXT QUARTER

01

Involve team members earlier in change.

They feel 22 points less involved than senior leaders.

02

Pair every AI rollout with clarity and skills.

Weekly use is 71% with both, and 19% with neither.

03

Don't let nationalisation success mask expat attrition risk.

27% to 29% of expat employees plan to leave within two years.

FOR LEADERSHIP

01

Protect your credibility.

Following through on commitments remains the strongest driver of advocacy.

02

Test your comfort with AI against your people's.

Leaders are twice as comfortable as team members with AI making hiring decisions.

03

Keep direction visible.

79% are confident in their organisation's future. That confidence is worth protecting.

BEHIND THIS REPORT



EXE: Employee Experience Exchange, is a UAE-based community and consultancy on a mission to transform society by transforming work. We believe workplaces sit at the centre of our lives – and that when people thrive at work, communities and economies thrive too. We audit, advise and partner with organisations to create employee experiences that match their ambition. We bring together HR, internal communications, culture and leadership professionals across the GCC who share a belief that work can and should be better.



Ipsos is one of the largest market research and polling companies globally, operating in 90 markets and employing 19,000 people. Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data from our surveys, social media monitoring, and qualitative techniques.

DON'T MISS OUT!

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Got questions?

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