

# LABOR MARKET INTELLIGENCE REPORT | 2024

## Beyond Borders: Bridging Mobility for Domestic Filipino Workers



BAGONG PILIPINAS



## I. Industry Overview

- In terms of TVET sector grouping, the Social Community Development and Services Industry consists of various sectors that offer services to people with activities ranging from personal care to household services, performing arts, security services, and other services.
- When linked to the Philippine Standard Industrial Classification (PSIC)<sup>1</sup> of the Philippine Statistics Authority (PSA), household services fall under the classification of Other Service Activities, with the division category of other personal service activities (964000: Domestic Services). Notably, the division (other personal service activities) includes types of services such as washing and dry cleaning of textiles and fur products, among others.
- Domestic services, based on PSIC (2019) include maids, drivers, cooks, houseboys, gardeners, tutors, personal secretaries, etc. employed in private households.
- The Philippines is recognized as a significant provider of top-notch human talent for the service industry. As the nation progresses with reforms aimed at fostering a more conducive business environment, there's anticipation of increased investment. This influx of investments directly fuels a rising need for services, resulting in expanded business and quality employment opportunities for MSMEs and the Filipino workforce<sup>2</sup>.
- In the last few years, domestic work has become an important sector of employment for migrant workers. For instance, in the case of the Philippines, the Overseas Filipino Workers (OFWs) have been considered as one of the domestic economy's growth operators. This is particularly observed in the personal remittances sent to families and loved ones in the Philippines<sup>3</sup>. The total remittances reached to PhP197 billion in 2022 (PSA, 2022).
- On the distribution of Overseas Filipino Workers by Place of Work, PSA's 2022 Survey on Overseas Filipinos reveals Saudi Arabia as the leading destination of OFWs (23%), followed by the United Arab Emirates (13.7%), Kuwait (7.7%), Hong Kong (6.1%), Qatar (5.8%), and Singapore (5.0%).

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<sup>1</sup> 2019 Updates to the 2009 Philippine Standards Industrial Classification

(<https://library.psa.gov.ph/cgi-bin/koha/opac-shelves.pl?op=view&shelfnumber=140&sortfield=copyrightdate>)

<sup>2</sup> The Philippine Services Sector and APEC

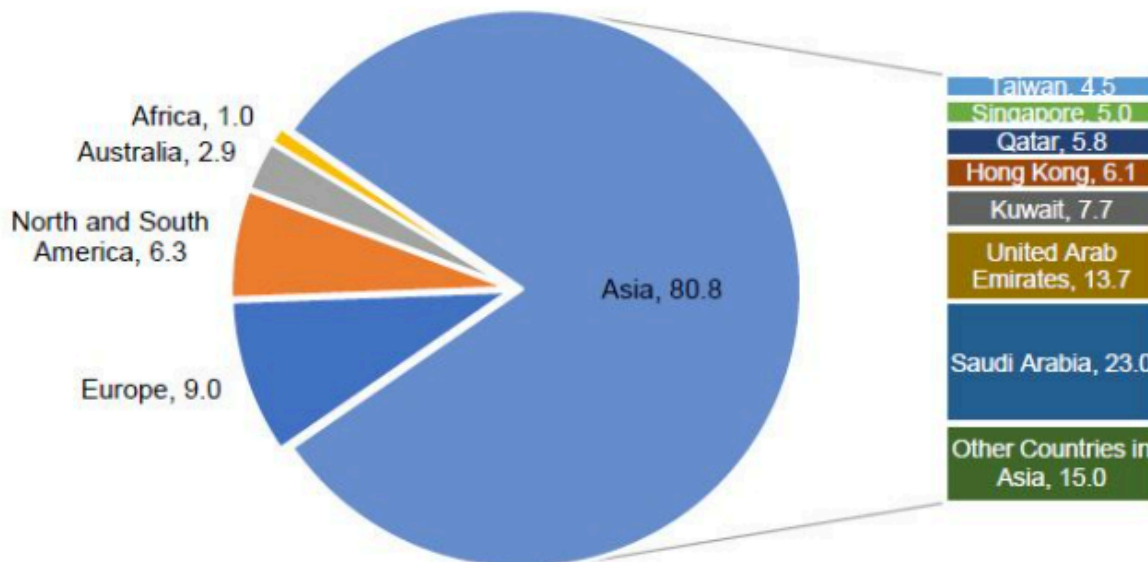
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<sup>3</sup> 2022 Labor Market Intelligence Report No. 3: Migrant Workers

(<https://www.tesda.gov.ph/Uploads/File/LMIR/2022/2022.09.29%20draft%20LMIR%20No.%203%20%20Migrant%20Workers%20-%20for%20posting.pdf>)



**Figure 1. Percent Distribution of Overseas Filipino by Age Group and Place of Work**



**Notes:**

1. The estimates cover overseas Filipinos whose departure occurred within the last five years and who are working or had worked abroad during the past six months (April to September) of the survey period.
2. Sum of details may not add up to 100% due to rounding.











Source: Philippine Statistic Authority, 2022 Survey on Overseas Filipinos

Source. Philippine Statistics Authority (2022 Survey on Overseas Filipinos)

- The other countries leading in terms of land-based OFWs in 2023 are Taiwan, Japan, Malaysia, and the United Kingdom.



**Figure 2. Landbased Total by Top 10 Destinations (2022 vs 2023)**

	SAU	143,847	▲	419,776		KWT	100,619	▼	70,124
	ARE	166,171	▲	282,896		TWN	19,978	▲	66,475
	SGP	74,734	▲	182,331		JPN	24,575	▲	45,724
	HKG	44,839	▲	175,877		MYS	15,094	▲	29,884
	QAT	82,046	▲	138,193		UK	11,750	▲	21,206

Source. Department of Migrant Workers (4th Quarter 2023 Overseas Deployment Statistics)

- On the data for OFW deployment by occupation, by country, the latest administrative data publicly available in the DMW is the 2010 report revealing the following countries as the top destinations for domestic helpers and related household workers:
  - Hong Kong
  - Kuwait
  - United Arab Emirates
  - Saudi Arabia
  - Qatar
- As it may be observed, the top 5 countries employing domestic helpers in 2010 are the same countries included in the top 10 destinations of OFWs in 2022 and 2023 based on the 4th Quarter, 2023 overseas deployment statistics report of DMW and the PSA's 2022 Survey on Overseas Filipinos.
- But besides migrant workers, the Quick LMI on Social Services in 2021 has mentioned two types of domestic workers: 1) Migrant (foreign) domestic workers; and 2) Local domestic workers.
- Concerning the distribution of workers by sex, the International Labour Organization (2012) reported that women make up more than four-fifths of the domestic workforce in the Philippines, roughly translating to 80%. Likewise, a 2020 report from the National Economic and Development Authority (NEDA) cited that "women are usually employed as waitresses, chambermaids, cleaners, travel agency sales persons, flight attendants, and front desk personnel"; further contributing to the idea of gender-appropriate jobs. Thus, as one of the industries benefiting from



housekeeping/household-related services, TESDA's Skills Needs Anticipation - Workplace Skills and Satisfaction (SNA-WSS) Survey for the Tourism Sector reiterated the criticality of examining the specific opportunities being given to women in view of the Philippine tourism industry boasting of the women's high industry representation.

- Moreover, the industry is also not exempted from the effect of technological changes with the TESDA's Training Regulations Evaluation report for the Tourism Industry noting that other countries have already implemented the automation of critical services such as housekeeping and front office services.

## II. Relevant Laws and Policies

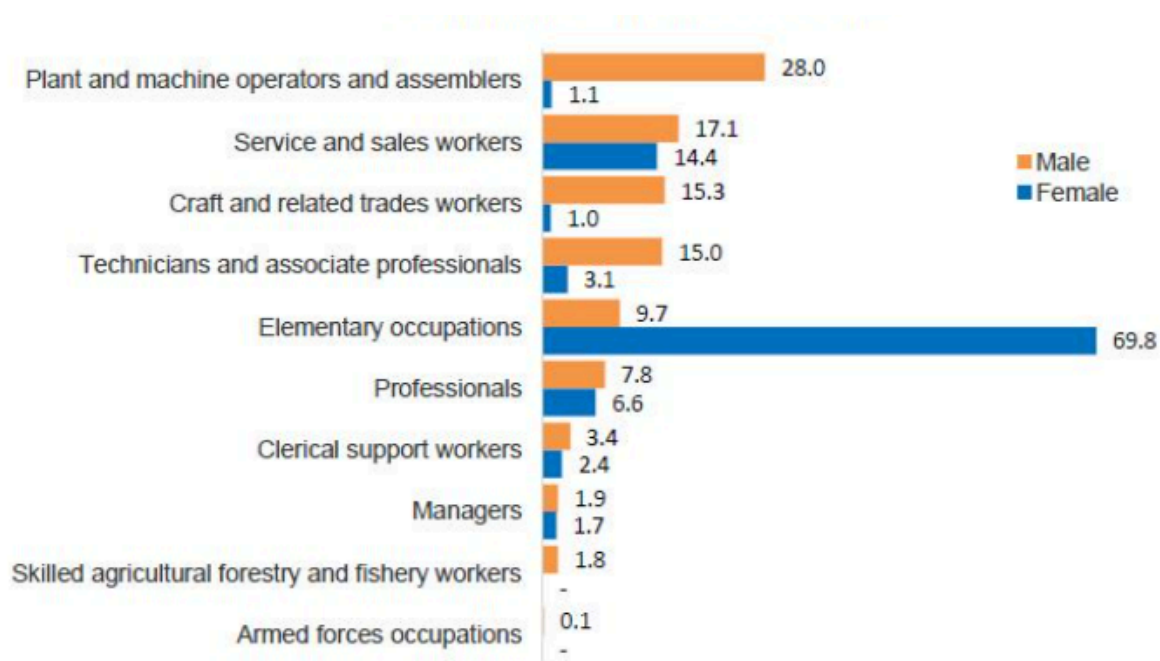
- With the labor issues surrounding domestic workers, particularly on salary and wages, various laws have been enacted to ensure the labor and social protection of these employed workers.
- The LMIR on Migrant Workers specified the following relevant laws and policies concerning domestic workers:
  - Republic Act No. 11641: The Department of Migrant Workers Act which led to the creation of a new department to expand assistance and expedite the delivery of services in light of the protection and promotion of the OFWs.
  - Republic Act No. 8042: Migrant Workers and Overseas Filipinos Act of 1995 which affirms the government's support and protection of the OFWs. The law also mandates government agencies involved in training and livelihood development, including the Technical Education and Skills Development Authority (TESDA) to prioritize returning OFWs employed as domestic workers and entertainers as a mechanism to assist the reintegration of Filipino migrant workers into the Philippine society. Additionally, this will help promote and facilitate local employment.
- Moreover, Republic Act No. 10361 also known as the Domestic Workers Act or the Batas Kasambahay aims to protect all domestic workers employed and working within the country. The law also stipulates the right of domestic workers to education and training, including access to technical and vocational training. In this case, TESDA is mandated to "facilitate access of domestic workers to efficient training, assessment, and certification based on a duly promulgated training regulation".



### III. Economic Contributions

- In the PSA's 2012 Philippine Standards Occupational Classification (PSOC), elementary occupations include cleaners and helpers in its sub-major group. On the other hand, personal service workers, including activities related to housekeeping and child and personal care, are a sub-major group under the Service and Sales Workers occupational type.
- The 2022 Survey on Overseas Filipinos conducted by PSA shows that the largest share (44.4%) of OFWs in 2022 were engaged in elementary occupations; followed by those engaged in service and sales and those working as plant machine operators and assemblers, 15.5 percent and 12.4 percent, respectively.

**Figure 3. Percent Distribution of Overseas Filipinos by Major Occupation Group and Sex: 2022**



**Note:**

The estimates cover overseas Filipinos whose departure occurred within the last five years and who are working or had worked abroad during the past six months (April to September) of the survey period.

Source. Philippine Statistics Authority (2022 Survey on Overseas Filipinos)



- Meanwhile, to further study the performance and economic trends of the country's formal sector, the results of the Annual Survey of the Philippine Business and Industry (ASPBI) may be revisited, particularly covering the Other Service Activities.
- From the sample extracted from the list of establishments, the 2021 survey round reported a total of 9,564 establishments engaged in other service activities. However, out of this, only 0.9% are in other personal service activities where domestic service is included. Still, it should be noted that the ASPBI only covered sampled establishments and did not include those employed in the households, as well as those not reported as part of the formal economy.

**Table 1. Statistics for Other Service Activities Establishments by Industry Group (Other Personal Service Activities): Philippines, 2021**

Industry	No. of Establishments	Employment as of November 15	Average Number of Workers per Establishment	Average Annual Compensation per Paid Employee (PhP)
Other Service Activities (Total)	9,564	64,372	7	98,731
Other Personal Service Activities, n.e.c.	85	387	5	104,042

Source. Philippine Statistics Authority (Table on Summary Statistics for Other Service Activities Establishments by Industry Group)

- Regarding the compensation, the 2021 ASPBI mentioned an average annual compensation of PhP 104,042 equivalent to about PhP 8,670 monthly. Whereas, PSA's 2022 Occupational Wages Survey reported that under elementary occupations – other service activities, the average monthly compensation is PhP 13,579.
- The prevailing wages for the industry are a testament that ILO's observation in its 2012 report maintains the same, indicating that as the population of domestic workers is rising, on average, they remain one of the lowest earners compared to other wage earners.

#### IV. Skills Requirements (In-Demand and Emerging Requirements)

##### A. Labor Market Forecast 2022–2025

- Table 2 lists the domestic work-related in-demand and emerging occupations based on the Department of Labor and Employment's Labor Market Forecast



2022-2025 identified based on the regional consultations of the DOLE Regional Offices.

**Table 2. In-Demand and Emerging Occupations in Domestic Services**

<b>Region</b>	<b>In-Demand Occupation</b>	<b>Emerging Occupation</b>
CAR	Cook Domestic helper	
Region II	Cook	
Region III	Domestic helper	
Region X	Kitchen helper	
Region XIII		Cook

*Source. DOLE Labor Market Forecast 2022-2025*

#### **B. TESDA's Workplace Skills and Satisfaction Survey for the Tourism Industry**

- On the side of TESDA, the Agency conducts Skills Needs Anticipation - Workplace Skills and Satisfaction (SNA-WSS) Survey for selected industries to examine how labor markets and jobs, skills, and learning needs are changing. It signals current and possible future skill mismatches and informs decisions on addressing them. One of the industries covered in 2022 was the Tourism Industry with the following highlights and results relevant to the domestic service industry:
  - Among the six tourism-related industries based on the Philippine Tourism Satellite Account of the Philippine Statistics Authority (PSA) and the 10 core tourism products specified in the Department of Tourism's (DOT) Philippine Tourism Human Capital Development Plan 2021-2025, the WSS Survey covered accommodation as one of the priority tourism industries.
  - In the Survey, 21 tourism enterprises participated across the identified tourism industries. Out of these respondents, 43% comprise the accommodation sector.
  - In terms of the value chain, the accommodation tourism industry explored the technical and emerging requirements of Food Production, Front Office, Housekeeping, and Other Services.
  - Following the PSOC and PSIC classification of domestic service-related occupations, the SNA-WSS Survey shows that the highest percentage of





workers are employed in Elementary Occupations at 31.59%. Some of the occupations classified as elementary occupations are cleaners, room attendants, kitchen helpers, dishwashers, and baggage handlers.

- Below are the domestic services-related occupations included in the SNA-WSS Survey for Tourism Industry.

**Table 3. Occupations/Skills Requirements in Domestic-Related Services**

Value Chain	Occupation
Food Production	<ul style="list-style-type: none"> <li>● Kitchen assistant/kitchenhand/kitchen porter<sup>a</sup></li> <li>● Muslim friendly food production<sup>b</sup></li> <li>● Food handling and sanitation<sup>b</sup></li> </ul>
Housekeeping	<ul style="list-style-type: none"> <li>● Presser (hand or machine)<sup>a</sup></li> <li>● Laundry worker<sup>a</sup></li> <li>● Window cleaner<sup>a</sup></li> <li>● Laundry attendant<sup>c</sup></li> </ul>
Other Services	Gardener <sup>a</sup>

Source. TESDA's SNA-WSS Survey for the Tourism Sector

Note:

- <sup>a</sup> Addressable by TVET; Not in-demand nor hard to fill
  - <sup>b</sup> Addressable by TVET; Emerging
  - <sup>c</sup> Addressable by TVET; In-demand
- Despite not being included in the list of in-demand positions, the same survey revealed specific positions that will be difficult to replace once an employee resigns including housekeeping, cook, kitchen staff, and laundry worker. However, the lack of technical skills in housekeeping is also mentioned as one of the reasons for underperforming employees in tourism enterprises (100%) followed by a lack of soft skills including communication skills (66.67%).
  - The survey also highlighted the need for multiskilling especially for small-scale businesses as one worker may be assigned to multiple




functions. Other training needs mentioned include food handling, customer service, and housekeeping.

### C. 2022 Labor Market Intelligence Report on Migrant Workers

- Based on the 2018 Overseas Employment Statistics of New Hires OFWs issued by the Philippine Overseas Employment Administration, the top jobs for migrant workers include:
  - Domestic cleaners and helpers
  - Cleaners, helpers in offices hotels, and other establishments,
  - Home-based personnel, care workers, and kitchen helpers
- The other skills requirements mentioned in the LMIR are as follows:
  - Hand launderers and pressers
  - Window cleaner
  - Cook
  - Another cleaning worker
- As an update to the 2022 LMIR on Migrant Workers, in the 4th Quarter, 2023 report of the Department of Migrant Workers, domestic cleaners and helpers are the topmost newly-hired occupations in 2022 and 2023 respectively, followed by domestic housekeepers. On the other hand, cleaners and helpers in offices, hotels, and other establishments come in 4th while cooks are in the top 8.

**Figure 4. Newly-hired OFWs by top 10 skills (2022 vs 2023)**



**Newly-hired OFWs by top 10 skills  
2022 vs 2023**

Domestic Cleaners and Helpers	108,797	▲	157,812
Domestic Housekeepers	44,545	▲	115,218
Manufacturing Labourers	21,327	▲	26,643
Cleaners and Helpers in Offices, Hotels and Other Establishments	7,060	▲	19,771
Nursing Professionals	9,060	▲	13,223
Waiters	8,963	▲	10,699
Welders and Flamecutters	4,277	▲	7,818
Cooks	2,678	▲	4,531
Motor Vehicle Mechanics and Repairers	1,918	▲	4,197
Stationary Plant and Machine Operators	1,279	▲	3,992

Source. Department of Migrant Workers (4th Quarter 2023 Overseas Deployment Statistics)



- In terms of soft skills (as one of the reasons for underperforming employees in the SNA-WSS Survey for the Tourism Sector), the LMIR cited the study entitled, Soft Skills and Job Opportunities of Migrants: Systematic Relationships in the Labor Market, with the following 15 Soft Skills identified for migrant workers:
  - Ideas Creation
  - Coordination ability
  - Multicultural ability
  - Planning ability
  - Learning ability
  - Professionalism
  - Leadership
  - Information management ability
  - Ethics
  - Communication ability
  - Social responsibility
  - Entrepreneurship development
  - Collaborative governance
  - Sustainable development
  - Dealing with others

## V. TVET Statistics

- The table below lists the jobs/skills requirements in Section IV mapped vis-a-vis the equivalent TVET Programs.

**Table 4. Mapping of Jobs/Skills Requirements and the Equivalent TVET Program**

<b>Jobs/Skills Requirements</b>	<b>Equivalent TVET Program</b>
Kitchen assistant/kitchenhand/kitchen porter	No Equivalent TVET Program
Kitchen helper	Domestic Work NC II
Domestic cleaners and helper	Domestic Work NC II
Domestic housekeeper	Domestic Work NC II



	Housekeeping NC II
Cook	Cookery NC II
Cleaners, helpers in offices hotels, and other establishments	No Equivalent TVET Program
Home-based personnel and care workers	No Equivalent TVET Program
Hand launderers and pressers/laundry workers/laundry attendants	Domestic Work NC II
	Housekeeping NC II
Window cleaner	Domestic Work NC II
Gardener	No Equivalent TVET Program
Muslim-friendly food production	Halal Awareness
Food handling and sanitation	No Equivalent TVET Program

- In terms of the existing TVET Program, the equivalent jobs as specified in Section I of the Training Regulations as well as its Core Competencies are as follows:

**Table 5. Mapping of the Existing Training Regulation vis-a-vis the Equivalent Jobs**

TVET Program	Equivalent Jobs (Section I)
Domestic Work NC II	<ul style="list-style-type: none"> <li>• Domestic Worker</li> <li>• Houseboy</li> <li>• Housemaid</li> <li>• Housekeeper</li> <li>• Hand-launderer</li> <li>• Helper, Kitchen</li> <li>• Cleaner, Hotel</li> </ul>
Housekeeping NC II	<ul style="list-style-type: none"> <li>• Junior Cleaner</li> <li>• Assistant Cleaner</li> </ul>



	<ul style="list-style-type: none"> <li>• Assistant Public Area Cleaner</li> <li>• Cleaner</li> <li>• Public Area Cleaner</li> <li>• Attendant</li> <li>• Room/Cabin Attendant/Room Maid</li> <li>• Laundry Attendant</li> <li>• Housekeeping Attendant</li> <li>• Butler</li> </ul>
Cookery NC II	<ul style="list-style-type: none"> <li>• Cook or Commis</li> <li>• Assistant Cook</li> </ul>

- In terms of the EGAC outputs, it may be observed that for the housekeeping Training Regulation, the trend is increasing. Meanwhile, the Domestic Work NC II experience a downward trend with a negative growth rate of 65.25% (2023 vs 2021 data).

**Table 6. Enrolled, Graduates, Assessed, and Certified for Domestic Service-Related Training Regulations (2021-2023)**

Training Regulation	2021				2022				2023			
	E	G	A	C	E	G	A	C	E	G	A	C
Housekeeping NC II	8,889	8,257	16,672	16,068	11,053	10,178	35,448	34,281	14,569	8,014	49,186	47,849
Cookery NC II	16,880	16,558	24,219	23,405	19,232	18,718	36,992	35,814	23,340	19,982	57,615	55,863
Domestic Work NC II	10,791	9,210	97,542	87,680	6,496	6,825	102,855	94,201	3,750	3,609	114,180	107,423

Source. ICTO processed by the Planning Office

- Despite the demand for Housekeeping NC II, the program has a relatively lower number of trainers than Domestic Work NC II.



**Table 7. TVET Infrastructure on Service-Related Training Regulations (2021–2023)**

<b>Training Regulation</b>	<b>Registered Programs</b>	<b>Assessment Center</b>	<b>Competency Assessor</b>	<b>NTTC Holder</b>
Housekeeping NC II	691	364	533	2,034
Cookery NC II	701	371	705	2,506
Domestic Work NC II	91	124	410	683

*Source. Certification Office processed by the Planning Office*

## **VI. Conclusion and Recommendations**

### **1. Provide the necessary upskilling and reskilling programs.**

Considering the adopt and adapt system of TESDA, new competency standards shall be developed on emerging requirements such as Muslim-friendly food production and food handling and sanitation. Part of the development is the exploration and adoption of methodologies wherein specific requirements of recipient countries may be embedded.

Other skills training necessary includes technical skills such as language training (e.g. Arabic, English, Japanese), cultural sensitivity training, as well as soft skills including communication, coordination, professionalism, and dealing with others.

Further, the continuous strengthening of the implementation of TESDA's programs allows migrant workers to access quality TVET, for instance, through the use of the TESDA Online Program.

### **2. Protecting domestic worker's rights through increased participation in training and strengthened assessment and certification.**

In terms of the major occupational group, most of the deployed OFWs are employed in elementary occupations. Moreover, due to the general view that domestic workers are less educated and the occupation requires a low skill level, they also receive the lowest average pay compared to other wage earners. With the labor issues surrounding domestic workers, particularly in light of working



conditions and wages, the Philippines enacted various laws that aimed to ensure the labor and social protection of the employed workers.

The provision of training and the conduct of assessment and certification for migrant workers provide an avenue for TESDA to assist in the better integration of the program graduates into the workforce. With the new and emerging demand in the industry, the role of the TVET in skills training, retooling, and upgrading is critical to provide better opportunities for domestic workers.

For the local domestic workers, TESDA ensures the availability and sufficiency of its assessment infrastructure as reflected in Table 7. Whereas, for migrant domestic workers, the conduct of the Overseas Assessment Program (OAP) to Overseas Filipino Workers (OFWs) had been resumed in 2023, following the temporary halting of operations during the pandemic. After the pilot implementation in South Korea, the OAP was implemented in Saudi Arabia and the United Arab Emirates, two of the topmost OFW destinations.

The OAP aims to provide free assessment services to OFWs where they can be certified of their competencies acquired through prior training or work experience. This is part of the Agency's continued efforts to reach out to the OFWs dubbed as the country's modern-day heroes<sup>4</sup>.

### **3. Collaboration with other national and international government agencies, and industry organizations.**

From the development of the standards and implementation of the assessment and certification to the recognition of the National Certificate, engagement with the industry stakeholders and government agencies (local and international) is a critical factor to success.

For instance, bilateral agreements entered by the Philippines with foreign governments concerning skills training and development shall be maximized in aid of ensuring the availability of a skilled workforce in the country. These partnerships may also be utilized to ensure that the Philippines' skills training are at par with the international standards. Moreover, the commitment of the industry and government agencies are essential in the promotion and recognition of the program graduates.

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<sup>4</sup> <https://hir.harvard.edu/overseas-filipino-workers-the-modern-day-heroes-of-the-philippines/>



The partnership with DMW may be further explored in view of the conduct of onsite training and assessment particularly in countries that are top recipients of Filipino migrant workers.

#### **4. Review of relevant Training Regulations.**

Although the Training Regulation for Domestic Work NC II is experiencing a downward trend, the review of administrative data for the TR Evaluation (Phase 1) reveals that the TR is the least in terms of priority for review (Priority 4). Still, the downward trend may be further explored in view of its relevance to the industry needs. The social, community and other services sector may be considered as one of the priority sectors for TR Evaluation, following as well the implementation of the TESDA sa Barangay Program.

Moreover, as highlighted in the SNA-WSS Survey, the updating and upgrading of the Training Regulations and curriculum is essential in consideration of the following:

- a. New technology especially;
- b. New equipment in other skills;
- c. Other policies; and
- d. Environmental/green practices in the hotel and restaurant industry

#### **5. Advocacy and promotion of TVET Programs.**

TESDA has to intensify its awareness drive for relevant and available TVET training programs using online platforms (e.g. social media) and other forms of media to encourage more people to take TVET courses in this sector.





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