



TECHNICAL EDUCATION AND SKILLS DEVELOPMENT AUTHORITY



**SKILLS NEEDS ANTICIPATION
WORKPLACE SKILLS AND SATISFACTION SURVEY
(TOURISM SECTOR)**

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OPERATIONAL DEFINITION OF TERMS

Employment Status – defined based on the following classifications:

- Time-Rated
 - Full-Time Regular Employment applies to a person who works 40 hours or more during the reference week. A worker is paid on the basis of a time unit of work such as an hour, a day or a month.
 - Part-Time Employment applies to a person who works less than 40 hours during the reference week and is paid on the basis of a time unit of work such as an hour, a day or a month.
- Full-Time Non-Regular workers are workers who work full time but with temporary status classified into probationary, casual, contractual, seasonal or apprentices/learners.
- Outsourced Workers are workers hired outside a company to perform tasks, handle operations or provide services.
- Commission Workers applies to a person who is hired only to complete a service or task with the control and supervision of the employer. This may include workers with basic pay and commission or purely paid on commission.
- Output Workers are workers who are not subjected to full supervision and control of employer but are paid in relation to their output (i.e., piece-rate, quota, pakyao, “takay”, or task)

Facility/Enterprises – refers to the enterprises/facilities, services and attractions primarily engaged in whole or in part in tourism and for the purposes of attracting to and within the Philippines. For the purposes of this survey, a facility does not necessarily require a DOT accreditation.

Occupational Type – based on the 2012 Philippine Standard Occupational Classification, the following occupational types and definitions are followed:

- Managers - workers that plan, direct, coordinate and evaluate the overall activities of enterprises, governments and other organizations, or of organizational units within them, and formulate and review their policies, laws, rules and regulations. Examples include HR manager, marketing executive, travel agency manager, museum manager, cafe manager
- Professionals - workers that increase the existing stock of knowledge, apply scientific or artistic concepts and theories, teach about the foregoing in a systematic manner, or engage in any combination of these activities. Examples include sculptor, painting restorer, building architect, digital artist, graphic designer/artist, lecturer, sales executive, advertising assistant.
- Technicians and Associate Professionals - workers that perform mostly technical and related tasks connected with research and the application of scientific or artistic concepts and operational methods, and government or business regulations. Examples include horse riding instructor, sailing instructor, underwater diving instructor, photographer, interior designer, gallery/museum technician, chef.
- Clerical Support Workers - workers record, organize, store, compute and retrieve information-related; and perform a number of clerical duties in connection with money-handling operations, travel arrangements, requests for information, and appointments. Examples include secretary, maintenance clerk, office clerk, travel agency clerk, customer service representative, hotel receptionist, payroll clerks, and library clerks.
- Service and Sales Workers - workers provide personal and protective services related to travel, housekeeping, catering, personal care, or protection against fire and unlawful acts, or demonstrate and sell goods in wholesale or retail shops and similar establishments, as well as at stalls and on markets. Examples: Museum guard, Doorkeeper, Bouncer

- Skilled Agricultural, Forestry and Fishery Workers - workers grow and harvest field or tree and shrub crops, gather wild fruits and plants, breed, tend or hunt animals, produce a variety of animal husbandry products, cultivate, conserve and exploit forests, breed or catch fish and cultivate or gather other forms of aquatic life in order to provide food, shelter and income for themselves and their households. Examples: crop grower, livestock producer, hunter and trappers
- Craft and Related Trades Workers - workers apply specific knowledge and skills in the fields to construct and maintain buildings, form metal, erect metal structures, set machine tools, or make, fit, maintain and repair machinery, equipment or tools, carry out printing work produce or process foodstuffs, textiles, or wooden, metal and other equipment or tools, carry out printing work produce or process foodstuffs, textiles, or wooden, metal and other articles, including handicraft goods. Examples include baker, confectioner, pastry maker, coffee/food taster, and underwater divers.
- Plant and Machine Operators, and Assemblers - workers operate and monitor industrial and agricultural machinery and equipment on the spot or by remote control, drive and operate trains, motor vehicles and mobile machinery and equipment, or assemble products from component parts according to strict specifications and procedures. Examples include bread/bakery product machine operator, laundry machine operator,
- Elementary Occupations - involve the performance of simple and routine tasks which may require the use of hand-held tools and considerable physical effort. Examples include hotel cleaners and helpers, kitchen helper, messenger, package deliverer, hand launderer, and valet.

EXECUTIVE SUMMARY

The tourism industry has long been a key driver of economic growth worldwide. In 2019, it was the third-largest category in global exports, generating US\$1.7 trillion in revenue and providing 100-200 million direct jobs. The Philippines mirrored this trend, with tourism contributing 12.8% to the national GDP and employing 5.7 million Filipinos, 60% of whom were women. However, the COVID-19 pandemic in 2020 severely disrupted the industry, leading to a 17.5% decline in employment and a sharp reduction in GDP contribution from 12.8% to 5.4%.

The pandemic underscored the need for transformation in the sector. Health and safety measures became a top priority for both businesses and consumers. Sustainable tourism gained traction, emphasizing reduced environmental footprints and resource efficiency. Digital transformation accelerated, with many enterprises adopting e-platforms for transactions and customer engagement. While these innovations improved efficiency, they also reduced demand for certain jobs, particularly in front-office operations.

A scoping study identified key challenges facing the tourism industry, including gaps in workforce skills, lack of training on emerging technologies, high employee turnover, and insufficient site maintenance competencies. The study also emphasized the importance of enhancing inclusivity and sensitivity regarding persons with disabilities, gender, culture, and religion.

Recognizing the critical role of skilled labor in tourism recovery, a joint effort among TESDA, the Department of Tourism (DOT), the Department of Education (DepEd), and the Commission on Higher Education (CHED) was established to strengthen tourism education and workforce development. This initiative aligns with the Philippine Tourism Human Capital Development Plan (PTHCDP) and the Reformulated National Tourism Development Plan (NTDP) 2021-2022.

To further address skills mismatches and labor market demands, the Skills Needs Anticipation - Workplace Skills and Satisfaction Survey on the Tourism Sector was conducted. Its objectives include assessing skills gaps, identifying emerging competencies, and evaluating employer satisfaction with TVET graduates. The findings will serve as a foundation for policy recommendations, curriculum enhancements, and workforce development strategies tailored to the evolving needs of the tourism industry. The study focuses on enterprises across four key tourism industries: Accommodation (Hotels, Resorts, Mabuhay Accommodation), Food and Beverage (Restaurants), Recreational Activities (Sun and Beach), and Tangible Cultural Services (Museums). Respondents were categorized by enterprise size, based on employee and asset classifications defined by the Philippine Statistics Authority (PSA) and the Magna Carta for MSMEs.

The survey results indicate that the participating tourism enterprises employ a relatively young workforce, primarily between 18 to 34 years old. The majority of employees hold elementary occupations and work as full-time regular employees, with 45.25% being college graduates. In terms of enterprise size, 42.86% are categorized as small enterprises, with assets ranging from PhP 3,000,001 to PhP 15,000,000, while another 42.86% are micro-enterprises, employing fewer than 10 workers based on Philippine Statistics Authority

(PSA) classifications. Additionally, while the Philippine tourism industry has a high representation of women, their occupational distribution reflects gender-based disparities. Although 45.74% of managerial positions are held by women, the majority of women employees work in clerical support roles, which are traditionally associated with lower wages and poorer working conditions.

Regarding employment trends, most enterprises reported either stable or increasing workforce size from 2021 to 2022, reflecting the industry's gradual recovery from pandemic-induced setbacks. As businesses reopened, job demand increased, but certain occupations remain hard-to-fill. Key shortages were noted in Muslim-Friendly Food Production (Halal Muslim), Laundry Management, Acoustic Design, Photogrammetry, and Guest Relations Management. The Accommodation Industry particularly struggles to fill high-level positions, often requiring a bachelor's degree, despite the fact that the necessary skills can be sufficiently addressed by TVET programs and National Certificate (NC) qualifications.

By industry policy, 57.22% of positions require a college degree, yet many enterprises acknowledge the importance of continuous learning and development for more than half of their workforce. Training and upskilling programs are commonly implemented for high-potential employees, while job reassignments, mentoring, and intensified supervision are among the key interventions for underperforming staff. Moreover, many tourism enterprises plan to expand infrastructure, promote sustainability and innovation, and enhance human resource development, particularly to create more jobs. Investments in both physical infrastructure and human capital remain vital to ensuring the continued growth and service quality of the tourism sector.

The survey findings also reveal that TVET graduates and TVET-certified employees constitute only 10% to 13% of the workforce, with the highest percentages found in Mabuhay Accommodation and Recreational Activities (Sun and Beach tourism). Despite their relatively low representation, tourism enterprises expressed satisfaction with the performance of their TVET hires. However, significant challenges remain in the areas of workforce development, business resilience, and technological adaptation. The COVID-19 pandemic significantly impacted micro and small enterprises, causing revenue losses and downsizing, though there is a strong recognition of the need for workforce upskilling and reskilling. The level of implementation, however, varies across tourism subsectors.

Identified Gaps and Challenges

Several gaps were identified across key areas, including workforce development, organizational performance, sustainability, and technological adaptation. One major concern is the limited representation of TVET graduates, despite industry recognition that TVET skills align with tourism job requirements. Current policies and hiring preferences still favor college degree holders, with fewer than 6% of employees identifying as TechVoc graduates.

Other challenges include job security, low wages, and better opportunities as they act as barriers to recruitment. Many enterprises report experiencing fast employee turnover, particularly at entry-level positions, due to the seasonality of tourism employment. Some

occupations fail to offer long-term, sustainable opportunities, leading to persistent vacancies despite high workforce demand.

Additionally, gender-based imbalances remain evident in employment patterns. While women are well represented in tourism, their occupational distribution suggests sex stereotyping and segregation, limiting their access to higher-paying and leadership roles. Women dominate in clerical support, managerial, and technical positions, but remain underrepresented in STEM-related and frontline tourism jobs.

A lack of awareness on emerging skills in green jobs was also noted, despite most enterprises (19 out of 21) expressing commitments to sustainability. While several firms have received or sought government support under the Philippine Green Jobs Act, only two enterprises (both under the National Museum) demonstrated an understanding of the emerging skills required for green jobs. The majority of enterprises identified a strong need for knowledge enhancement on sustainability trends and green competencies.

Another pressing issue is the varying capacity for investment in learning and development programs. While larger enterprises have demonstrated a greater ability to invest in workforce development, smaller businesses struggle due to limited financial resources. Similarly, micro and small enterprises lag behind in technological adaptation, citing financial constraints, inadequate digital infrastructure, and limited access to training as key barriers. The disparity in digital adoption means that emerging skills such as AI and Big Data are perceived as both highly demanded and inapplicable, depending on the enterprise's size and operational model.

Recommendations and Policy Implications

To address workforce development challenges, TESDA should prioritize the development and implementation of training programs for key tourism occupations, especially those classified as hard-to-fill, such as Front Office Managers and Museum Guides. The Tourism Industry Board Foundation Inc. (TIBFI) should be consulted to ensure industry-driven competency standards and curriculum development. Training programs should focus on emerging skills such as digital technology, crisis management, emergency response, basic foreign languages, sign language interpretation, inclusive tourism, and sustainability governance. TESDA should also review and update Training Regulations (TRs) for tourism-related programs to align with current industry needs. Additionally, micro-credential programs are recommended to be considered to enhance employability beyond seasonal work, and emerging green competencies must be continuously integrated in the existing tourism-related TVET programs.

To enhance the employability of TVET graduates, TESDA should collaborate with the Department of Tourism (DOT) and the Department of Labor and Employment (DOLE) to strengthen employer engagement programs. The Enterprise-Based Education and Training (EBET) Act could serve as a mechanism to encourage businesses to hire more TVET graduates. Tourism enterprises should also invest in structured learning and development programs, leveraging government support to address their financial constraints.

To improve workforce conditions, the tourism industry must conduct a comprehensive review of compensation and benefits. Efforts should focus on competitive wages, better working conditions, structured career pathways, and succession planning to mitigate high turnover rates. Gender disparities in employment should also be addressed through targeted recruitment strategies and initiatives promoting equal opportunities in traditionally male-dominated roles.

Finally, businesses must enhance technological adoption by investing in digital infrastructure and workforce training. Tourism enterprises should explore automation, digital marketing, and performance management systems to improve business resilience. Greater emphasis should be placed on sustainability strategies, including green skills training and the creation of green jobs with government incentives.

Survey Process Enhancements

To improve future survey data collection, TESDA should consider more personalized outreach strategies, including phone calls, in-person interviews, and alternative data collection methods. Language barriers should also be addressed by providing Filipino translations of survey materials. Given the survey's length and complexity, incentives such as certificates of participation may encourage higher response rates.

By addressing these workforce and business challenges, TESDA, tourism enterprises, and relevant government agencies can work collaboratively to strengthen workforce development, promote sustainability, and enhance the long-term resilience of the Philippine tourism sector.

CHAPTER 1 INTRODUCTION

Looking at the pre-pandemic activities, in the year 2019, tourism was considered the 3rd largest category when it comes to global exports. The United Nations World Tourism Organization (UNWTO) reported during the same year that over 1.5 billion international tourists generated a total of US\$1.7 trillion in export revenues. It was also observed that 50% of the total exports in many small developing countries can be attributed to tourism revenues. Further, tourism was also able to generate 100-200 million direct jobs, employed women accounting for 54% share of the workforce, and even gave employment to the youth (United Nations World Tourism Organization, 2020).

The same trend can be observed in the Philippine tourism industry during the same year 2019. Through the expenditures and investments, the industry boosted a 12.8% share of the country's gross domestic product (GDP), allowing the employment of an additional 300,000 workers, and employing a total of 5.7 million Filipinos, accounting for a 13.6% share in terms of national employment (Department of Tourism, 2021). Additionally, the industry helps promote women's empowerment as 60% of the 5.7 million tourism workforce are women. Tourism, recognizing its importance through the Tourism Act of 2009, once again proved its power to contribute to the country's socio-economic development (Department of Tourism, 2021b, 2).

However, by the year 2020, the tourism industry experienced an unexpected shock. By March, the World Health Organization (WHO) declared the COVID-19 health outbreak as a global pandemic. Due to its contagious nature, disadvantageous effects on mobility and travel were felt. Extensive containment measures were implemented in every country including the closure of both the international and domestic borders in order to prevent the spread of the deadly disease.

The pandemic left a negative impact and effect on the tourism industry. The operations of most tourism businesses, especially travel agencies, transport services, hotels, and tour operations in the country were halted or in some cases, closed due to minimal or no revenue at all. By numbers, such difficulty can be equated to an estimated PHP 3 billion or PHP 63 billion for a 21-day work month (Department of Tourism, 2021a, 29).

As for the employment level, it declined from 5.7 million in 2019 to 4.7 million in 2020, a total of 17.5% reduction (Department of Tourism, 2021, 1). Following this decline, the Department of Tourism (DOT) observed that 4.8 million jobs out of the 5.7 million are impacted or affected especially during the period when lockdowns were imposed.

In a webinar hosted by the Department of Tourism (DOT) and the Philippine Statistics Authority (PSA) in 2021 regarding digital transformation and statistical products and services, it was shared that due to the pandemic, lockdowns, and movement restrictions, the slowing down of tourism activities impacted the country's Gross Domestic Product (GDP). The PSA informed that from a 12.8% GDP national economic share in 2019 (equivalent to PhP 2 trillion), the GDP share had fallen to 5.4% (PHP 973 billion) in 2020 — which should have been growing to 8.6% instead according to the World Travel and Tourism Council (WTTC) (Philippines Statistics Authority, 2021; Department of Tourism, 2021).

The facilitated industry consultations of the Regional Offices of the Technical Education and Skills Development Authority (TESDA), in view of the Area-Based and Demand-Driven TVET, had revealed that many of the tourism workers, for instance, tour guides have shifted work to survive the economic downturn caused by the health crisis. Although many did find employment in other sectors, others remained jobless.

Due to the pandemic and other developments in the industry, a few things are being given attention, including

(1) Health and safety: With the sudden occurrence of the COVID-19 pandemic, consumers now give priority to the ability of workers and organizations to apply necessary health-related measures, food safety practices as well as having a Business Continuity Plan (BCP) and safety and security-related skills in place with a heightened focus on immediate response skills. Although such practices were already existing even before the pandemic, this requirement is now considered at the topmost level among all consumer concerns.

(2) Sustainable tourism: The shift towards a green economy particularly by reducing environmental footprint (e.g. utilization of digital tools, resource efficiency) is more highlighted.

(3) Digital transformation: Due to the limitations posed by movement restrictions during the first two years of the COVID-19 pandemic, the sector harnessed the potential of technology, digitalization, and automation to remain competitive. The emergence of electronic platforms(e-platforms) to conduct tourism businesses is now in the spotlight. Most tourism sites now have an e-transactional platform in place compared to the traditional cash and onsite payment method. In order to also keep the carrying capacity in check in accordance with existing protocols, tourists are mostly required to pre-register and they also prefer to do this in a convenient and touchless manner.

Nevertheless, the downside is that such development can affect employment opportunities. According to an accommodation facility owner during the conducted industry scoping meeting for this study, the need for marketing and sales personnel especially booking staff is quite relevant to their organization back in 2010 to 2012. However, after the pandemic, they adapted day-to-day operations without such a position using current technologies like automated booking systems. With work becoming more efficient, they realized that the need for front positions can be lessened.

Aside from these aforementioned concerns, a few other challenges were identified during the scoping for the tourism industry (Technical Education and Skills Development Authority, 2022b, 3-16):

- Lack of capacity-building efforts;
- Need to update and realign the tourism education and workforce skills;
- Insufficient competency concerning site maintenance (especially for cultural and natural heritage);
- Training on new technologies (e.g. automated systems for front office and all other aspects of most services – on check in and check out, ordering systems in restaurants)
- Need for knowledge and information sharing practices;
- Improvements in the field of research;
- Lack of equipment in tourism sites;
- Employee/Worker piracy;

- High turnover rate; and
- Sensitivity and inclusivity (e.g. for Persons with Disabilities, Religion, Gender, and Culture)

In terms of skills development, the DOT noted that when tourists go to certain destinations, what they consume or ‘buy’ is not only the place or attraction itself but also the skills and services of tourism employees. As such, the quality of the current workforce becomes the measurement of success when it comes to how service and product standards are delivered in accordance with meeting the existing and future demand of the market specifically for tourism (Department of Tourism, 2021a, 35).

According to the department, the goal now is to create a sincere, enthusiastic, and dedicated workforce to solve the absence of a systematic approach when it comes to human capital development which includes the development of tourism training programs focused on boosting employee productivity and industry competitiveness (Department of Tourism, 2021a, 34-35). Especially with the latest developments and trends in the industry along with the recovering state of the sector, the strengths and vulnerabilities of markets, destinations, people, and institutions were highlighted.

When it comes to upgrading tourism education and skills training, a joint effort among different agencies was formed to improve its state. A Memorandum of Understanding (MOU) was signed by the DOT, the Department of Education (DepEd), TESDA, the Commission on Higher Education (CHED), and the Tourism Industry Board Foundation, Inc. (TIBFI) on November 5, 2020, regarding the convergence of efforts towards Tourism and Hospitality Education and Training (Arimado, 2020).

The objectives include “strengthening of an industry-led education and training that will standardize academic and practical instructions with an end result of producing world-class tourism manpower”; fostering the “spirit of cooperation and complementation of efforts, commit to supporting the plans and programs, projects, and activities, for the development of human resources for the Philippine tourism industry”; and work together and “collaborate in their tourism human resource development plans and programs to synchronize its commitment in the Association of Southeast Asian Nations (ASEAN)” (Department of Tourism, 2021a, 40).

Harmonization efforts are vital, provided that the DOT also implements programs for skills development and with the TIBFI’s launching of The Academy: The Tourism and Hospitality Education platform. All of these programs from various agencies and organizations are in line with the Philippine Tourism Human Capital Development Plan (PTHCDP).

For TESDA, although the agency is continuing its best efforts to produce the country’s skilled and competent graduates, the importance of evidence-based policies in the economic and social recovery of the tourism sector should still be re-evaluated and cannot be overemphasized. As the tourism facilities reopen and additional talent is needed, the availability of timely, relevant, and reliable statistics complemented with labor market information will be critical in rebuilding the tourism industry. Consequently, the labor market analysis will require an examination of the current situation and its future direction vis-a-vis skills needs, jobs, and learning needs.

The role of TESDA towards the realization of the stated goals is recognized in Republic Act No. 9593 or the Tourism Act of 2009 which mandates TESDA to “develop, in conjunction with the Department of Tourism, programs for the training of tourism entrepreneurs by providing programs for languages, history, and cultural appreciation, and small business management” (*Tourism Act of 2009*).

Hence, the conduct of the Skills Needs Anticipation - Workplace Skills and Satisfaction Survey (SNA-WSS) for the Tourism sector will not just aid in the accomplishment of the United Nations Sustainable Development Goals (UN SDGs) specifically SDG 4 (Quality Education), SDG 8 (Decent Work and Economic Growth), and SDG 12 (Responsible Consumption and Production) but will also complement the goals and vision of the Reformulated National Tourism Development Plan (NTDP) 2021-2022 and the PTHCDP 2021-2025, stating the need to address the skills gaps and prepare people for employment.

1.1. Objectives of the Study

The result of the SNA-WSS Survey aims to provide information to Technical-Vocational Education and Training (TVET) stakeholders about the employers' desired skills and competencies of their workers in the next 5 years and beyond, job-skills mismatch, and the satisfaction of employers with TESDA graduates in response to meeting the requirements of the tourism industry.

Consequently, the results shall serve as the basis for the identification of actions that can be undertaken to address the requirements of the tourism sector, including the review and development of policies to improve and enhance the system. The specific objectives of the study are as follows:

1. Provide quantitative measures on skills, e.g. skills gaps, skills shortages, and skills utilization in the workplace;
2. Assess factors that are likely to impact skills use;
3. Identify emerging future skills; and
4. Determine the satisfaction of employers with the competencies and performance of TVET graduates in the workplace.

1.2. Scope and Limitations of the Study

For the purposes of this study, the term “enterprise” was used as the unit of analysis. Tourism enterprise is defined as “facilities, services, and attractions involved in tourism” (*Republic Act 9593*) such as but not limited to the identified tourism industry in this study. Tourism Industry, on the other hand, refers to the tourism sector's subgroups which is a collective term for businesses involved in the production of tourism goods and services.

Primarily, this study aims to anticipate the needs of the tourism sector, particularly in terms of employee skills by looking at the current state and practices of different tourism enterprises in the Philippines. Current trends that are already affecting or may likely impact the sector were also covered to know the awareness and preparations of these enterprises. In order to gather the appropriate respondents for

the study, the survey population was obtained from the databases of relevant national agencies and associations concerned with the study.

As part of defining the scope of this study, it is imperative to understand the nature of the industry. The tourism industry is a cross-sectoral industry that includes forward linkages (directed at suppliers) and backward linkages (towards consumers); thus, referred to by Von der Ropp and Kleshchenko (2020) as “a complex system” as it also cuts across various industries including “transportation, building, and construction, food and waste management, among others”.

The nature of the sector may likewise be observed in the 2019 Philippine Standard Industrial Classification (PSIC) which shows that there is no stand-alone industry classification for tourism. Rather, the industry can be seen in various industries and sectoral mapping in PSIC such as Transportation and Storage, Accommodation and Food Services, and Arts, Entertainment, and Recreation.

Relative to this, several tourism industries exist, which, according to the United Nations World Tourism Organization’s Glossary of Terms (n.d), may otherwise be called tourism activities that “typically produces tourism characteristic products”.

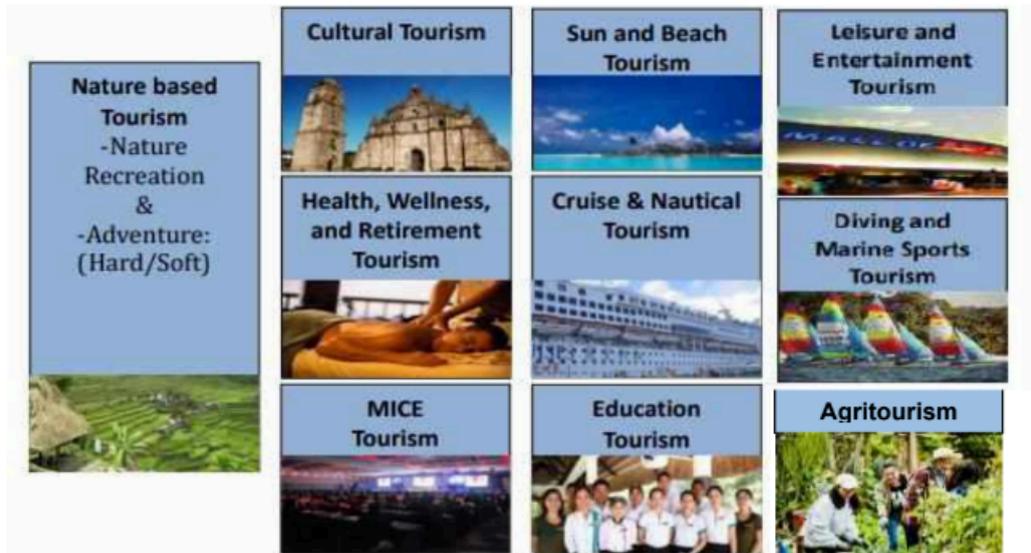
The following are the different tourism-related industries based on the Philippine Tourism Satellite Account:

- 1) Accommodation, Food & Beverage
- 2) Passenger Transport (land, water, & air)
- 3) Travel Agents, Tour Operators, & Tour Guides
- 4) Recreation, Entertainment & Cultural Services
- 5) Retail Trade on Tourism-characteristics Goods
- 6) Miscellaneous (including Health & Wellness, etc.)

Among these six tourism industries (also sometimes called tourism characteristic industry), this study considered the following in identifying the industries to be covered:

- Six common labor divisions in the ASEAN Mutual Recognition Arrangement on Tourism Professionals;
- Most affected by the COVID-19 pandemic, particularly those that greatly suffered the quarantine protocols and lockdown restrictions;
- Suffered the highest decline in inbound tourism expenditure (visit of foreign visitors and nationals permanently residing abroad) and domestic tourism expenditure; and
- Convergence with the priority core tourism products identified in the reformulated NTDP needed to rebound the Tourism Sector and the Philippine Economy.

Figure 1.
Philippine Tourism Product Portfolio



Provided the mentioned considerations, the study initially focused on the resulting tourism industries:

- Accommodation
- Food and Beverages
- Travel Agencies and Tour Operations
- Recreational Activities (Sun and Beach; Nature-Based)
- Tangible Cultural Heritage
- Intangible Cultural Heritage

Yet, due to the difficulties faced during the conduct of the study such as lack of industry participation, incomplete database information, and insufficient responses resulting to lack of representation, the study proceeded with four tourism industries, further classified in terms of specific products and services offered to result in the following:

1. Accommodation - Hotel
2. Accommodation - Resort
3. Accommodation - Mabuhay Accommodation
4. Food and Beverage - Restaurant
5. Recreational Activities - Sun and Beach
6. Tangible Cultural Services - Museum

Additionally, participating respondents were also further sub-categorized based on their enterprise size which is defined by two considerations, in terms of employee size and in terms of asset size. The scope follows the description of the PSA and the Magna Carta for Micro, Small and Medium Enterprises (MSMEs) respectively:

- 1) Enterprise size (by employee size)
 - a) Micro: enterprises with less than 10 employees
 - b) Small: enterprises with 10 to 99 employees
 - c) Medium: enterprises with 100 to 199 employees

- d) Large: enterprises with 200 or more employees
- 2) Enterprise size (by asset size)
- a) Micro: enterprises owning up to Php 3,000,000 asset size
 - b) Small: enterprises owning Php 3,000,001 to 15,000,000 asset size
 - c) Medium: enterprises owning Php15,000,0001 to 100,000,000 asset size
 - d) Large: enterprises owning Php 100,000,001 and above asset size

In order to clearly define each identified tourism industry used in the study, a detailed description was provided below.

1.2.1 Accommodation

Based on the DOT Memorandum Circular No. 2022-001 “accommodation establishments” shall refer to establishments operating primarily for accommodation purposes including, but not limited to, hotels, resorts, apartment hotels, mabuhay accommodation establishments (tourist inns, motels, pension houses, bed and breakfast, vacation homes, hostels, and other similar accommodation establishments) private homes used for homestay, ecolodges, serviced apartments, and condotels (Department of Tourism, 2022, 1).

Table 1.
Classification of Accommodation Industry

Classification	Characteristic
Hotel	shall refer to full-service accommodation with a reception and guest rooms generally offering private facilities with dining facilities and services
Resort	shall refer to full-service accommodation located in a more natural, relaxed environment, with a reception and guest rooms generally offering private facilities with dining and recreation facilities and services
Mabuhay Accommodation	shall refer to Tourist Inns, Pension Houses, Motels, Bed and Breakfast, Vacation Homes, Hostels, and other similar accommodation establishments according also to a respondent for this study, Mabuhay accommodation can be differentiated from other accommodation facilities by looking at the number of rooms, the size of each room, and the facilities offered (those that have a spa, pool, and gym services may already be classified as hotels). Mabuhay accommodations also have a size of less than 21 square meters and are now the term used for inns, condotel, transient houses, etc. in the Philippines. Accommodations under this category are usually cheap and are popular to those tourists that are on a budget.

Note. Based on the DOT Memorandum Circular No. 2022-001 entitled “Revised Interim Guidelines Governing Applications for Accreditation During the State of Calamity due to COVID-19”

Tourism enterprises included in the study classified by the definitions above mostly are DOT accredited, while some are also members of the Calamianes Association of Tourism Establishments (CATE), an association based in Coron, Palawan (Region IV-B) involved in the study.

1.2.2 Food and Beverage

The food and beverage industry by definition, includes “establishments primarily engaged in preparing meals, snacks, and beverages, to customer order, for immediate consumption on and off the premises” (Anderson & Westcott, 2020, 71). During the validation of the research design and questionnaire, the DOT representative noted that regardless of the offered product/service (e.g. cafe, pastries, fast food), they only use one classification which is restaurants. Thus, this study followed the DOT classification for food and beverage.

1.2.3 Recreational Activities

In view of the top priority core tourism products, sun and beach was considered as a subcategory. For reasons already specified above, nature-based which covers leisure activities for recreational parks, ecotourism sites, and the natural environment are not covered.

Table 2.

Classification of Recreation Industry

Classification	Characteristic
Sun and Beach	enjoyment and relaxation based on sun, sea, and sand still remain the basis of coastal tourism (González et al., 2018, 11). May also refer to coastal tourism which refers to land-based tourism activities including swimming, surfing, sun bathing, and other coastal recreation activities taking place on the coast (Organisation for Economic Co-operation and Development, 2021b)

1.2.4 Cultural Services

This industry refers to the type of tourism activity in which the visitor’s essential motivation is to learn, discover, experience and consume the tangible and intangible cultural attractions/products in a tourism destination (United Nations World Tourism Organization, 2017).

For the purposes of this study and in connection with the 2016 Philippine Tourism Statistical Classification System (PTSCS), cultural activities shall only refer to

tangible cultural heritage or those that include museums and historic sites/buildings/landscapes (United Nations World Tourism Organization, 2016) (Philippine Statistics Authority, 2016, 3) and intangible cultural heritage (i.e. music and performing arts, and visual arts) (UNESCO, 2003 as cited in United Nations World Tourism Organization, 2012, 1).

While two categories of cultural services were introduced, it was only the tangible cultural heritage, specifically museums that were included in the final sample size. Almost all of the enterprises included under this industry are members of the National Historical Commission of the Philippines/National Commission for Culture and the Arts (NHCP/NCCA), specifically the museums, this is the reason why only the museums were considered under this industry; endorsement from the mentioned organizations helped in gathering the sufficient number of responses needed for the study.

1.2.5 Characteristics of the Respondents

Before proceeding with the survey, the facility/enterprise willing to participate must satisfy both the following conditions (particularly for tangible cultural enterprises):

1. **Employment generating.** If the facility is being managed by the LGU, it should have a different set of employees, either working as full-time, part-time, or outsourced
2. **Income generating.** For instance, there is an entrance fee in order to enter the facility.

As for the characteristics of the respondents, the respondent matrix found in Table 3 was designed to ensure that the parts of the questionnaire will be answered by the appropriate department and individuals concerned.

Table 3.
Respondent Matrix

Respondent	Questionnaire Section
To be answered by the respondent with the most sections completed.	Section O
HR Manager/HR Personnel	Section A. Basic Organizational Background Section B. Critical Human Resources Section C. Skills in Your Business Section D. Emerging Skills Associated with Industry Development Section F. Learning and Development Section K. Workforce Matters
Operations Supervisor	Section E. Green Jobs Section G. Work and Employment Practice Section I. Work Processes and Technology

In the absence or unavailability of the positions mentioned above, the researchers allowed multiple employees to answer the survey so long as they are working on a function similar in the developed matrix.

Moreover, in view of the cluster approach strategy in the adopted NTDP, the survey only covered enterprises in Regions III, IV-B, VII, and NCR. This will be further explained in the methodology section of this report.

CHAPTER 2

REVIEW OF RELATED LITERATURE

In order to capture the need for more comprehensive and updated information about tourism employment, this chapter covers first the performance of the tourism sector over the past few years, and how favorable and beneficial it is to every country, especially in terms of employment and GDP. Additionally, the performance of the sector in the Philippine setting will also be discussed specifically information and data from 2016 to 2019. The drastic change experienced by the sector due to the disruptive health crisis from 2019 to 2020 and its adverse effects on the country's employment is also included along with other challenges and trends.

Establishing the need for improvement and reconditioning of tourism employment in the country, especially when it comes to skills and education, the second part of this chapter will dive into efforts done to develop this specific issue in the said sector. Included in this part are the information-gathering efforts of government agencies that seek to understand the current state of tourism employment in the Philippines and which also serve as the basis for the sector's improvement and long-term plans starting with the DOT's Learning Needs Assessment (LNA) to TESDA's SNA-WSS Survey.

2.1. The Tourism Sector

Tourism is and always has been one of the most impactful and important driving forces for socio-economic development in any country or region. Every country will include tourism as one of its most popular and greatest assets added to its very unique and culturally-rich nature that no wonder the level of priority every country invests just to make sure their respective tourism are known world-wide. Aside from its ability to beautifully distinguish a country from another, the tourism sector's very high potential to influence various enterprises and job creation either to local, rural, coastal, and remote communities makes every effort worthwhile given that such efforts will facilitate public services and infrastructure development (International Labour Organization, 2022, 8). According to WTTC, the tourism sector globally is at a period of almost constant growth and diversification from 2013 to 2019. In 2019,

tourism was one of the world's fastest-growing and largest economic sectors. It represents at that time, 10.4% of the total global gross domestic product (GDP) (World Travel and Tourism Council, 2020, 1).

When it comes to employment, tourism and travel in 2019 was responsible for over 334 million jobs globally which accounts for 10.6% of the total employment worldwide (World Travel and Tourism Council, 2021, 3). In the same year, the sector consists of 7 million employers, with the majority belonging to MSMEs specifically, enterprises having less than 50 employees. 30% of the sector's workforce found employment in microenterprises (number of employees ranging from 2 to 9. (International Labour Organization, 2022, 11).

Looking at the performance of the Philippines' tourism sector from 2016 to 2019, it can be seen that it aligns directly with the global performance of said sector. Share to GDP can be seen as increasing as well as employment in millions and its percent share to the overall employment of the country.

Table 4.
Tourism in Figures (2016-2019)

Indicators	2016	2017	2018	2019
Expenditures (Php Billion)				
Inbound	2,191	2,805	3,292	3,742
Domestic	315	453	446	600
Tourism Gross Value Added (Php Billion)	1,876	2,353	2,846	3,142
Share to GDP (%)	10.4	11.7	12.3	12.8
Employment (Million)	5.2	5.3	5.4	5.7
Share to Total Employment (%)	12.8	13.1	13	13.6
Visitors (Millions)				
Inbound	6	6.6	7.2	8.3
Domestic	75.7	86	98.6	109.8
Investments (Php Billion)	738	839	540	605

Source. Philippine Tourism Satellite Amounts (PTSA) 2019

Before going into 2016, the Department of Tourism generated a National Tourism Development Plan (NTDP) for 2016 to 2022, below is the comparison of the targets for the year 2019 against the actual performance of the said year. Although we can see that most of the indicators included showed an increase in terms of the sector's performance, some indicators on the other hand, exhibited a slight decrease: inbound revenue, employment in million and its share to the country's total employment.

Table 5.
DOT 2019 Comparative Tourism Indicators

Indicators	2019 Targets	2019 Actual
Revenue (Php Billion)	2,888	1,595
Inbound	564	482.15
Domestic	2,324	3,100
Tourism Gross Value Added (Php Billion)	1,588	2,480
Share to GDP (%)	8.6	12.7
Employment (Million)	5.8	5.7
Share to Total Employment (%)	13.6	13.5
Visitors (Millions)		
Inbound	8.2	8.26
Domestic	79.3	109

Source. National Tourism Development Plan (NTDP) 2016-2022
Department of Tourism 2019 Tourist Arrivals

Such decrease especially in terms of employment is attributed to the COVID-19 pandemic, tourism was not spared and has been one of the hardest hit among the other economic sectors affected by the pandemic. Implementation of containment measures in many countries made a profound impact on the sector, from 1.5 billion in 2019, international tourism arrivals fell to 381 million in 2020, a decrease of 74%. Such impact was even more felt in Asia and the Pacific wherein the decrease fell to 84% (United Nations World Tourism Organization, 2021). Due to the pandemic, the contributions of the tourism sector to the global economy collapsed. Employment supported by the sector also fell by 18.5% which is equivalent to 272 million, an equivalent of 62 million jobs were lost (World Travel and Tourism Council, 2021, 5).

As for the Philippines, results of the Philippine Tourism Satellite Accounts (PTSA) for the year 2020 from the PSA and DOT which was released in June 2021, it can be observed below that performance indicators for the Philippine tourism sector were not favorable: the sector's share to Philippine GDP declined from 12.8% in 2019 to 5.4% in 2020. It can also be seen that employment levels also dropped from 5.7 million to 4.7 million, looking at the 2019 versus the 2020 data respectively, such a decrease is equivalent to 18.1% (Department of Tourism, 2021b, 18-19).

Table 6.
COVID-19 Impacts on the Philippine Tourism Sector

Indicators	2019	2020	% Change
Expenditures (Php Billion)	3742	689	-81.6
Inbound	600	133	-77.9

Domestic	3,142	557	-82.3
Tourism Gross Value Added (Php Billion)	2,507	973	-61.2
Share to GDP (%)	12.8	5.4	-57.8
Employment (Million)	5.7	4.7	-18.1
Share to Total Employment (%)	13.6	11.9	-12.8
Visitors (Millions)			
Inbound	8.3	1.5	-81.9
Domestic	109.8	24.2	-78.0
Investments (Php Billion)	605	431	-28.8

Source. Philippine Tourism Satellite Amounts (PTSA) 2020

In addition to this, as illustrated in the table below, it can be seen that all of the tourism industries also felt the disadvantageous effects of the pandemic in terms of employment. The recreation, entertainment, and cultural services industry was revealed to have the largest percentage of decline due to the health crisis. The accommodations and food and beverage industry on the other hand, experienced the largest displacement of up to 400 thousand employees when based on absolute numbers (Department of Tourism, 2021b, 19). All of these industries as mentioned in the earlier sections are concerned and included in the study.

Table 7.

COVID-19 Impacts on Philippine Tourism Employment

Tourism Characteristic Industries	2019	2020	% Change
Accommodations and food and beverage	1933	1468	-24.0
Passenger transport	2,184	1,870	-14.4
Travel Agents, tour operations and tourism guides	40	38	-4.9
Recreation, entertainment and cultural services	402	231	-42.6
Retail trade on tourism-characteristic goods	369	356	-3.4
Miscellaneous	792	718	-9.3
Total	5720	4681	-18.1

Source. Reformulated National Tourism Development Plan (2021-2022)

Apart from the economic challenges and the unprecedented job losses brought about by the pandemic, several other difficulties are faced by the sector combined with the different global trends, trends which arose because of the pandemic, being in the age of the 4th industrial revolution or because of the ever-changing nature of the sector itself. The tourism sector even before, harbors decent work deficits: excessively long

working hours, a high turnover rate, gender-based discrimination, low wages, and a lack of social protection. Added to this, shifting and night work, seasonality, temporary and part-time employment, and the increase in outsourcing and subcontracting are also commonly found in tourism. These challenges or barriers if not addressed will lead to difficulties in maximizing the sector's potential in contributing to economic development and also in the improvement of the sector's sustainability (International Labour Organization, 2022, 12).

Affecting such economic contribution and improvement to the sector's sustainability are emerging trends in the tourism sector in which most enterprises are now required to adapt. Some of these are influenced or accelerated by the recent health crisis: consumer demand for health-related practices; digitization of tourism especially when it comes to payment methods, registrations, booking systems, and the like; emergence of interactive and modern technologies such as Augmented and Virtual Reality (AVR); the emergence of sustainable tourism and green jobs (Department of Tourism, 2021a, 21-23).

While some of these trends might likely impact the sector more strongly than others (smart technologies, for example, can remove certain tasks from certain job titles), these trends also add a few other skill sets required for those jobs that were transformed or modified (Department of Tourism, 2021a, 23). And while threats such as these can affect employment in the tourism sector, personal or human interaction is still vital to the sector. Many customers especially in the hospitality industry prefer exchanges with an employee or staff (Smallwood, 2021). According to industry experts, although there is a need to embrace changes and advancements specifically the use of technology, the human factor should not be removed because the basic reason why people travel as added by them, is for human interaction (Carruthers, 2022). In connection with this is the fact that when tourists go to destinations, they buy not only the attractions, food and merchandise but also the skills and services of the tourism employees (Department of Tourism, 2021a, 35).

2.2. DOT's Learning Needs Assessment and the Development of the SNA-WSS Survey

However, with the intention of keeping up with the latest trends and advancements in the tourism sector, gaps in the supply of and demand for skills will surface. Low- and medium-skilled jobs might now need to combine with other complementary skills along with the existing skill sets. Skills shortages affect tourism enterprises of any size, especially MSMEs since it is more difficult to attract skilled workers or train them in order to ensure that the necessary skills mix is present. This is where technical and vocational education and training (TVET) and skills development comes into play to respond to the tourism sector's requirements of today in order to create and secure decent jobs, to improve productivity, employability, and social inclusion, and to maximize the opportunities and well-being of the general workforce. Knowing that the sector is currently facing major skill gaps, TVET and skills development have a very significant role in boosting productivity and profitability (International Labour Organization, 2022, 26).

With the existence of skills mismatches and a lack of access to skills development

opportunities, TVET programs become crucial to the tourism sector. TVET for the Philippines falls under the jurisdiction of the Technical Education and Skills Development Authority or TESDA, legally mandated based on the Republic Act 7796 or TESDA Act established on August 25, 1994. When it comes to TVET for the tourism sector, TESDA currently offers 35 tourism qualifications registered under the Philippine Qualification Register, looking also at the agency's statistics for the 4th Quarter of 2020 along with the past statistical data, tourism (hotel and restaurant) is always considered as one of the top three sectors with the most graduates (Department of Tourism, 2021a, 64).

Although the sector performs favorably in terms of creating graduates and certified future tourism employees (the tourism sector shows a 95.49% certification rate and is considered the sector with the most number of assessment and certification output), TESDA further exerted its efforts to improve the sector. Being aware of the challenges faced by the sector as well as the gaps that resulted from these challenges, the agency identified priority sectors that shall be the focus of the National Technical Education and Skills Development Plan (NTESDP) for 2018 to 2022, tourism along with seven other sectors were included given that the sector is also identified as one of the major employee generators of the country (Technical Education and Skills Development Authority, 2018, 64).

As an effort to also respond to the recent challenges and trends of these priority sectors especially in terms of employee skills education and development, research activities were conducted by different agencies. One of which is the Learning Needs Assessment (LNA) in 2019 by the Pioneer Professional Academy of Asia in collaboration with the Department of Tourism Office of Industry Manpower Development. This LNA targeted tourism professionals in the tourism value chain, in which respondents from each region were asked to rank 45 tourism-related competencies in terms of importance and proficiency. The study also categorized these competencies in terms of the training type (Department of Tourism, 2021a, 84-85):

- a. Skills – Operational skills needed by employees to perform their assigned tasks.
- b. Soft Skills – Additional skills that may not be directly related to the process in completing the tasks but are important in performing effectively (ex. Communication skills, interpersonal skills).
- c. Technical – Trainings that are meant to teach technological aspects of the job, such as use of programs/software or systems.
- d. Quality – Trainings that impart knowledge on quality standards.
- e. Professional - Provides the trainees with continuing education allowing them to be up to date in their professional fields.
- f. Leadership – Trainings that prepare employees for leadership roles.
- g. Health/Safety – Trainings that provide know-how on health and safety standards and planning for health and safety issues.

The study revealed that according to the respondents, more than 50% of the competencies are considered as hard skills training, professional training and training

concerning health and safety. It was also found out that when it comes to the importance of tourism-related competencies; tourism awareness, sustainable tourism, leadership and people management, communication and interaction skills, and tourism product development makes up the top five. In terms of proficiency on the other hand, tourism awareness is still on 1st, followed by communication and interaction skills, personality development, leadership and people management, and problem solving and decision making. Through these ranking process, the study was also able to rank the competencies with the biggest gap, the top five of these are: technology and digitalization in tourism, future of tourism in the 4th industrial revolution, tourism trends and forecasts, barrier-free tourism, and understanding muslim travelers (Department of Tourism, 2021a, 85-89).

Being the arm of the government for technical education and skills development, TESDA also created their means of knowing the employment status of their prioritized sectors mentioned earlier. A study specifically, the Skills Needs Anticipation - Workplace Skills and Satisfaction (SNA-WSS) was created for such a purpose. Initially conducted for the Information Technology – Business Process Management (IT-BPM) and construction sector in 2019, the SNA-WSS survey was constructed to provide quantitative measures on skills, assess factors that may or may not impact employee skills, identify emerging future skills, and to also determine employer satisfaction when it comes to TVET graduate competencies and performance (Philippine Statistical Research and Training Institute, 2022).

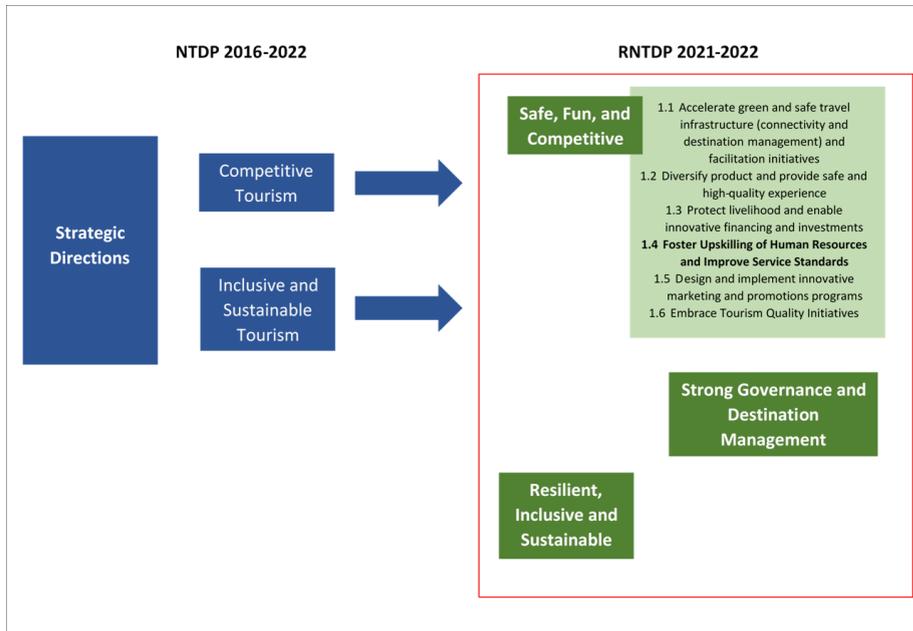
In a wider scale, the survey and the study are part of TESDA's efforts in addressing, identifying, and providing information about the different industries' challenges in employment such as skills mismatch and labor demand-supply. Especially skills shortages which are seen to affect tourism companies of all sizes but in particular, MSMEs. According to the data of PSA, close to 100% of tourism and tourism-related enterprises are considered micro, small and medium. Specifically, out of 144,640 companies in the accommodation and food service industry in 2018, 144,535 are MSMEs and in general, 998,342 of the 1 million establishments (Arnaldo & Nicolas, 2020). And these enterprise sizes struggle to attract skilled workers or train workers, affecting the future of the sector in which necessary skills mix exists mostly due to financial resources since the sector is characterized by its seasonal revenue flows (International Labour Organization, 2022, 45).

Results of SNA-WSS survey will also serve as one of the basis in the development of TESDA's policies, strategies, and training programs in order for these to be more aligned to the current and future needs of the different sectors, specifically, tourism as what this study is centered on (Employers Confederation of the Philippines, 2022).

The SNA-WSS survey and study will also be beneficial to other government agencies in the Philippines especially the Department of Tourism as the Reformulated National Tourism Development Plan (RNTDP) for 2021 to 2022 includes the upskilling of human resources and the improvement of service standards under their first strategic direction (promoting safe, fun, and competitive tourism) as seen in the figure below. DOT's plan will be carried out through the collaboration with CHED, TIBFI, DENR, and most importantly, TESDA, facilitating tourism education and training through the

formulation and conduct of training programs among others.

Figure 2.
COVID-19 Impacts on Philippine Tourism Employment



Source. Reformulated National Tourism Development Plan (RNTDP) 2021-2022

CHAPTER 3 METHODOLOGY

3.1. Research Methodology

The main objective of the study is to determine the current skills supply and demand in the workplace, emerging skills requirements and competencies, and the existing job-skills mismatches, which can help in the projection of future skills needs. As mentioned above, this study will help complement other government agencies' programs and policies for the industry such as DOT's PTHCDP.

With all the mentioned trends and challenges for the tourism sector, amplified by the recent health crisis that evidently impacted how the sector operates, a strong public-private partnership through a well-crafted technical education and skills development program for the tourism workforce will enable the improvement of capacity building and innovation of the said sector. In order to effectively do this, a descriptive cross-sectional design is fitting and shall be used.

This research design provides a "snapshot of the frequency and characteristics of a condition in a population at a particular point in time" (Ihudiebube-Splendor & Chikeme, 2020). It will allow skills measurement of TVET graduates while describing its relationship among phenomena (e.g. employer's satisfaction). Following this, probability sampling was employed to capture various representatives of the population.

Given the characteristics of the sampling frame as adopted from the previous conduct of the WSS survey, the said research methodology was proven to be appropriate.

3.2. Questionnaire

The survey questionnaire developed through the technical assistance of the International Labour Organization (ILO), used since the pilot of the SNA-WSS survey, was enhanced based on the observations and experiences during the data-gathering process in 2021 for the Health and Logistics sectors.

Although there is a standard questionnaire used for all the sectors covered in the 2022 SNA-WSS survey, TESDA learned that the survey design and questionnaire would still vary depending on the characteristics or profile of the sector. As such, minor modifications were made to the survey tool for the Tourism sector to better cover the context of the sector and ensure the acceptability of the target respondents.

Based on the results of the scoping meeting conducted for the sector, the developed questionnaire was validated by the industry associations/organizations through a validation meeting conducted in September 2022. Particularly, the following organizations/industry associations were involved in the development and validation of the research questionnaire:

- Department of Tourism — Office of Industry Manpower Development
- Tourism Industry Board Foundation, Inc.
- Calamian Association of Tourism Establishments, Inc
- Philippine Parks and Biodiversity
- National Parks Development Committee
- International Council on Monuments and Sites Philippines
- Asian School of Hospitality Arts
- Center for Culinary Arts, Manila

The questionnaire was divided into 12 sections in accordance with the SNA Manual and as listed below, to achieve the survey objectives.

1. Profile of the Company

This gathers information such as the position of the respondent, the name of the facility, the location, and the industry to which the facility belongs.

2. Basic Organizational Background

This section asks for information on the distribution of employees by occupational type and employment status, highest educational attainment, age group, and gross monthly salary (PhP). This section also asks for the percentage of female employees and gathers information on which tourism enterprises are part of multinational organizations and the location of their main offices.

3. Critical Human Resources

This particular section asks about the status of employee size from 2021 to 2022, the expected change in employee size for the succeeding years, the presence of

unfilled positions in the last six (6) months, whether or not the tourism enterprise has fast turnover and the occupational types that are difficult to retain, in addition to the reasons for fast turnover. Likewise, it inquires about the approximate percentage of employees who would be difficult to replace within three months if they resigned, as well as the top three jobs that would be difficult to replace in the event of resignation, the percentage of employees who left due to resignation, contract termination, or retirement, and the top three reasons for resignation.

Moreover, this section gathers information on the percentage of vacancies in the tourism enterprise relative to education requirements, the number of employees promoted to managerial and supervisory positions, the presence of structured program for high potential employees, the percentage of employees with outstanding performance, and, the percentage of employees supported by career or structured planning policies or practices for future development.

4. Skills in the Business

For this section, respondents were asked on the percentage of employees according to their performance (able to perform the job, unable to perform the job, and have the potential to perform with more demanding duties), reasons behind poor performance and corresponding actions applied, whether actions were done for those with more potential and whenever applicable, the reason why no action was done.

Correspondingly, the respondents were also asked on the percentage of all positions in the facility that by policy require specific educational attainment, more than two (2) weeks of induction training, continuous learning or developmental activities, and at least three (3) years industry-relevant experience. Different industry-related jobs or skills that may or may not be applicable to the participating facilities, their projections if either these jobs may have a shortage, no change, surplus, or will be hard to fill in the next five (5) years were also asked. Added to these is the information whether those occupations/skills needs/requirements may be addressed by either a basic education, technical vocational, or higher education graduate employee, if a technical vocational/national certificate is required for those basic education or TVET graduate employees/applicants and whether such qualifications are needed nationwide or only to a specific area.

Furthermore for this section, the percentage of women employed in Science, Technology, Engineering, and Math (STEM) related occupations is also included, along with the reasons for low representation of women if the percentage is below twenty-five percent (25%) and the three (3) STEM-related occupations in their enterprise that have low women representation.

5. Emerging Skills Associated with Industry Developments

This section contains questions on the emerging skills that are related to STEM, the fourth industrial revolution, the new normal, and other industry developments, and how likely those skills will impact skills demand for the sector in the next 1-5 years. This section also inquires on the readiness for the emerging skills, actions

undertaken by the facilities that are ready, preparations done for the human resource relative to the emerging skills, and reasons why the enterprise is not taking any actions for those that are not ready for the emerging skills introduced.

6. Green Jobs and the Health Sector

Questions under this section include the extent of implementation of each facility on various aspects of green jobs and provisions for any aspects of green jobs. The section also inquires whether the facility has received support or is seeking support from any government agency, the name of the agency/agencies, and in what ways/aspect the enterprise received support or is seeking support from this/these agency/agencies. Added to this is the list of emerging skills identified relative to green jobs and the relevance of the green industry developments to the current and near-future business needs in terms of knowledge, skills, and attitude.

7. Learning and Development

This section seeks information such as the percentage of payroll expenditure allotted for training developed and conducted by the facility and/or by external providers. It also seeks the facility's rating of various training-related statements using a 5-point scale where 5 means "strongly agree" and 1 means "strongly disagree".

8. Work and Employment Practice

For this section, questions are about the facility's policies covering various documents (i.e. business, training, and staff development plans, training budget, and development for high potential staff), the percentage of full-time permanent and contractual employees entitled to various rewards or opportunities, and the extent of information sharing in the tourism enterprise concerning financial information, business plans, operational challenges, and market analysis.

9. Business Strategy

Under this section, the facilities were asked to rate various statements regarding the approach to business and the extent of implementation of actions for different areas of business development. Questions on plans of expansion on other areas of business development were likewise included.

10. Work Processes and Technology

This section primarily focuses on gathering information on how up-to-date the facility's core equipment used in the production of goods and services is compared to the best commonly available technology in the country and overseas.

11. Organizational Performance

This particular section asks about the status of business outcomes such as profitability, total sales or revenue, and market share for the period 2021 to 2022. Moreover, it seeks information on the percentage of employees exhibiting various behaviors at work.

12. Workforce Matters

The last section of the questionnaire gathers information on the percentage of employees in the participating facilities who are TVET graduates. Likewise, the facilities were asked to give satisfaction ratings on the work and performance of TVET graduates and TVET-certified employees.

The questionnaire was converted online using JotForm, an online and code-free application used to create custom online forms. However, a PDF version of the questionnaire was also provided as requested to aid those who are not well-versed in online platforms. The questionnaires answered through other methods were also converted and encoded in the form of a JotForm submission.

3.3. Sampling and Sampling Techniques

The DOT's online database and CATE's member database served as the study's main sampling frame for accommodations, food and beverages, and recreational - sun and beach enterprises. For the Cultural Services - Museum, the museums under the National Historical Commission of the Philippines (NHCP) and the NCCA Philippine Registry of Cultural Property were utilized. All the databases were consolidated and further refined by removing all the duplicates and other survey considerations.

If there are cases where an enterprise has multiple branches operating in the same or in multiple regions, only one (preferably main) branch was considered (e.g. 3 branches of Go Hotels belonging under the accommodations industry are all found within NCR). In the event of refusal from the facility/office occurred, replacement will be obtained randomly from other branches.

As mentioned in Chapter 1, four regions (NCR, III, IV-B, and VII) were considered in the study based on the clusters identified from DOT's tourism cluster concept. The clustering entails connecting Tourism Development Areas (TDAs) into logical groups, resulting in 20 thematic clusters and 78 TDAs in the DOT's Reformulated NTDP 2021-2022.

Figure 3

Tourism Cluster Concept

Develop a globally competitive, environmentally sustainable and socially responsible tourism industry that promotes inclusive growth through employment generation and equitable distribution of income thereby contributing to building a foundation for a high-trust society.

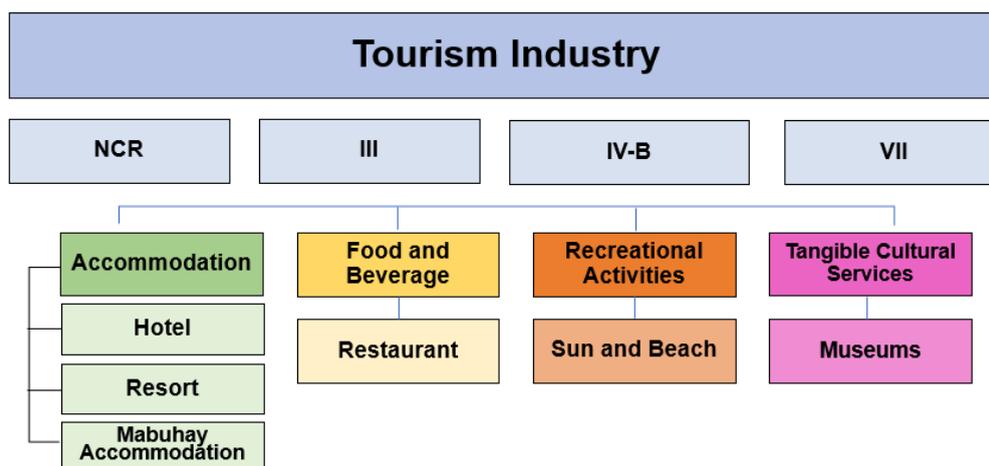


Source. Reformulated National Tourism Development Plan (2021-2022)

Half of the 20 clusters are considered as the country’s priority narrowed down by the researchers using the Flagship Tourism Enterprise Zone (TEZ) Projects and Designated Tourism Enterprise Zones, as well as the regions that have tourism as the common priority industry relative to the area-based and demand-driven (ABDD) TVET initiative of TESDA (Annex A).

Shown in Figure 4 is the framework used for determining the sample size.

Figure 4
Framework for the Sample Size



In reference to the said prerequisites, a total of 1,061 enterprises served as the universe of the study. Table 8 presents the distribution of the enterprises by the tourism industry.

Table 8.
Distribution of Tourism Enterprises by Industry

Tourism Industry	Number of Enterprises
Accommodation	
• Hotel	240
• Resort	50
• Mabuhay Accommodation	430
Food and Beverage (Restaurant)	118
Recreational Activities (Sun and Beach)	48
Tangible Cultural Services (Museum)	175
Total	1061

In order to identify the sample size per subsector, stratified random sampling was used together with circular systematic sampling to determine the actual respondents who will participate in the study. The unit of analysis is “enterprises”; as such, the respondents shall only provide information about the operations of their respective enterprises, unless stated otherwise.

For the survey, a three-day heuristic guideline was taken into consideration wherein a three-day attempt for a week could be:

1. Combination of email and calls
 - 2 days of email and 1 day of the call
 - 1-day email and 2 days of call
2. Pure calls
 - 3 days of calls

The data-gathering process faced certain challenges such as difficulty in contacting or confirming participation. To solve this, a contingency protocol is set in place. For cases where the enumerator is unable to communicate with the sampled enterprise such that no responses from emails, SMS, or phone calls were received, the contingency is that a substitution replacement will be conducted. There should be an attempt of 2-3 times of calls with at least 15 minutes of intervals or at different times of the day for it to be considered as a one (1) day follow-up call. Emails and calls done per day may not be necessarily done on consecutive days.

Substitution, however, was not applied for sampled respondents with minimal to no information available (especially in terms of contacts) and cannot be found through available methods (i.e. asking the association they are a part of, desktop research). Included also are those respondents who refused or have expressed their non-commitment or non-participation such as hectic schedule, prior commitments, and some other business or operation-related reason/s, for the reason that data imputation, for this case, would only result in a survey bias. These types of respondents although not included in the data analysis will be classified as nonresponse errors.

Given that resources, especially time, are limited, including the nonresponse error, this study considered a 10% margin of error and 95% confidence level in calculating the sample size. The computation, as a result, generated a final sample size of 212.

Table 9.
Distribution of Final Sample Size by Industry

Tourism Industry	Number of Enterprises
Accommodation	
• Hotel	26
• Resort	7
• Mabuhay Accommodation	48
Food and Beverage (Restaurant)	49
Recreational Activities (Sun and Beach)	58
Tangible Cultural Services (Museum)	24
Total	212

3.4. Preparation for the Survey

For the survey's appropriate implementation and standardization, an interviewer manual was prepared and developed, derived from the past SNA-WSS Survey. The necessary adjustments and modifications were made to correctly match Tourism's questionnaire and data-gathering procedure.

An interviewee survey guide was also provided in order to assist the respondents in answering and accomplishing the questionnaire especially since respondents may answer on their own through the online survey tool and through the traditional pen-and-paper approach. Guidelines and instructions for specific questionnaire sections are also included in the guide along with explanations of some of the terminologies used to further make their answering more convenient and accurate. The guidelines on using the survey tool are incorporated in the actual JotForm link.

The researchers utilized mail merge for the efficient customization and sending out of invitation letters and other attachments via email. In line with this, a database for the mail merge function, which also served as the monitoring and status sheet for the responses and participation of tourism enterprises was prepared.

3.5. Data Collection Strategies and Processes

Although strict health restrictions and protocols were slowly being lifted at the conduct of this study, face-to-face interviews were still not done and discouraged given the limitations in resources, especially time and enumerators. As a result, the assistance of the various associations involved in the study was sought, especially in the data collection. Still, even the endorsement of the DOT and CATE, among others, did not yield an increase in the number of respondents. However, in the case of tangible cultural services - museums, the endorsement of the NHCP was proven to be critical.

For the survey operation, the following data collection strategies were used as influenced by the respondent's preference:

- Researcher-administered via a recorded zoom interview;
- Self-administered using the online tool;
- Self-administered using the traditional pen-and-paper/pdf method;
- Phone interview.

Regardless of the method used, JotForm was utilized especially during data encoding and validation.

For those tourism enterprises who opted for the researcher-administered survey via Zoom, they were given the link for the online survey to give them time to prepare the data/information required. Participants were also encouraged to answer some parts or sections of the questionnaire in advance for a more efficient and less time consuming interview. The zoom interview was also used as an avenue to probe/ask additional questions that will help validate/support the results of the survey. As such, the researchers made sure that all of the tourism industries will have a representation for this data collection method.

For respondents who opted for self-administered surveys, validation had been facilitated to prevent the survey responses from being incomplete or invalid.

The data collection period was from October to November of 2022, following the specific data collection process as outlined below:

1. The survey team will inform the involved industry associations that the team will start contacting their member facilities.
2. An email invitation will be sent to the sampled respondents containing guidelines for those who wish to participate in the survey including the mode of data collection, tourism industry, online survey link and form password, and important reminders from the survey guide. The initial email shall contain the following attachments, for the respondent's reference:
 - Invitation letter signed by the TESDA Director General;
 - Endorsement letter from the associations (as applicable);
 - Survey guide; and
 - Consent form
3. The survey team will make a series of follow-up emails and calls depending on the responses to the email invitation. A replacement guide will be established and followed to avoid yielding low response rates due to the consistent unresponsiveness of the sampled respondents.
4. Once the sampled respondent agrees to participate, a subsequent email will be sent containing key reminders before and after answering the link and the JotForm guide. The schedule regarding the validation interview will be facilitated as well.
5. If the respondents declined the invitation, reasons will be noted to form part of the recommendations.

3.6. Editing, Encoding, and Analysis

After the collection of data from the participating tourism enterprises and before proceeding to the next step, the gathered responses and submissions were checked if there were missed questions, possible errors, or inconsistencies using the developed clarification guide. Upon final clarification and verification with the respondents, the database was considered cleaned accordingly.

Additionally, some of the related responses were coded and combined to generate and correlate various indices. This study considered indices with correlation values of 0.4 and above or those that are at least moderately correlated with one another.

The tables generated, the highlights as well as the interpretations and analysis are reported in the succeeding section/chapter.

CHAPTER 4 RESULTS AND DISCUSSION

This chapter contains the survey findings in the form of summary statistics and tabulations, which are organized by section following the format of the questionnaire.

During the data collection process, several issues had been encountered which affected the response rate for this survey. In some cases, especially for Tangible Cultural Services - Museum, no database was received from relevant associations, except for NHCP museums. As such, finding the working contact details was proven challenging. Another is the responsiveness of the target respondents. Based on the monitoring of the research team, besides frequent emails, 81.13% of the respondents were contacted at least once through phone calls — many of which were either unattended or not answering.

Thus, replacements were generated as necessary. However, provided this study's limitations alongside other factors discussed in previous chapters, the survey still yielded low response rates.

A total of 21 out of the 212 computed sample size participated in the study, yielding an overall response rate of 9.91%. Five out of these 21 enterprises were surveyed via Zoom/Phone Call interview.

It should be noted, however, that although six tourism industries were initially covered in the study, incomplete submission (i.e. several missing sections) have been received from the Accommodation (Resort) and Food and Beverage (Restaurant), making the received responses as invalid that may affect the other responses. Therefore all succeeding tables from Table 10 will not include these two tourism industries.

Table 10
Distribution of Participating Tourism Enterprises and the Response Rate by Industry

Tourism Industry	Number of Tourism Enterprises	Response Rate (%)
Accommodation		
• Hotel	6	23.08
• Resort	0	0.00
• Mabuhay Accommodation	3	6.25
Food and Beverage (Restaurant)	0	0.00
Recreational Activities (Sun and Beach)	1	1.72
Tangible Cultural Services (Museum)	11	45.83
Total	21	9.91

Further, as shown in Table 11, the highest percentage (42.86%) of participating enterprises for both enterprise sizes are micro enterprises (in terms of employee size) and small enterprises (in terms of asset size).

It may be observed that in some cases, there is a discrepancy between the asset and employee size (i.e. the capacity of the enterprises in terms of increasing its employee size vis-a-vis its asset size is not currently maximized). During the interviews, this was found to be attributable to the COVID-19 pandemic where some of the enterprises just reopened during the second to last quarter of 2021; many are just recovering from the situation. Employers are slowly increasing the number of employees with the hope of bouncing back to the pre-pandemic state.

Table 11
Distribution of Participating Tourism Enterprises by Enterprise Size

Enterprise Size		Number of Tourism Enterprises	%
Employee Size	Micro	9	42.86
	Small	5	23.81
	Medium	2	9.52
	Large	5	23.81
	Total	21	100
Asset Size	Micro	4	19.05
	Small	9	42.86
	Medium	2	9.52
	Large	6	28.57
	Total	21	100

When the participating enterprises are analyzed by industry and sex, table 12 reveals that most of the tourism industries, except in Recreational Activities (Sun and Beach), are dominated by male employees. The lowest number of employed female workers are in Tangible Cultural Services (Museum) with a little over 25%. At least a quarter of the total number of employees in each tourism industry are women, which is consistent with the 2019 reported data of PSA and DOT observing how the tourism industry helps promote women empowerment by having a high representation of women in its workforce. Still, the data shall be cross-analyzed against the type of occupations where women are currently represented.

Table 12
Distribution of Employees by Industry, by Sex

Tourism Industry	Tourism Enterprises (%)		
	Male	Female	Total
Accommodation			
• Hotel	57.94	42.06	100
• Mabuhay Accommodation	64.67	35.33	100
Recreational Activities (Sun and Beach)	38.6	61.4	100
Tangible Cultural Services (Museum)	74.41	25.59	100

4.1 Basic Organizational Background

The occupational types presented in Table 13 follow the nine major groups of the 2012 Philippine Standards Occupational Classification (PSOC) to ensure consistency and improve the comparability of this survey to the classification systems used by the PSA and other government agencies.

As shown in the succeeding table, 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. Service and Sales Workers are also among the most common at 25.35% including occupations such as cook, salesman/saleslady, sales/shop supervisor/coordinator, and security guards.

On the other hand, the lowest percentage (0.51%) is in Skilled Agricultural, Forestry, and Fisheries (AFF) Workers. The latter may be attributed to the covered tourism industries since there is a separate growing tourism industry more related to this occupational group (i.e. Agrotourism), which is unfortunately not covered in this study. The specific occupation of the Skilled AFF Worker, however, was not identified.

The results of the survey are consistent with the October 2022 Labor Force Survey (Philippine Statistics Authority, 2022, Table 1) showing that the largest share of the employed is in elementary occupations (28.7%) followed by service and sales workers (23.1%).

The same is true when data is presented by industry and occupational type (Table 14). Other than skilled AFF workers, there are little to no employees identified for Plant and Machine Operators, and Assemblers and Craft and Related Trade Workers in all four tourism industries except Accommodation (Hotel).

The definitions and other examples for each of the occupational types can be found in the operational definition of terms.

In terms of the TESDA policies and programs, the generated tables may be used as guides in identifying what groups to focus on in the tourism industry provided the economic performance and jobs availability in the sector. The results of this one shall be cross-referenced with the other generated tables, particularly for the priority technical and emerging skills.

Table 13
Distribution of Employees by Occupational Type

Occupational Type	%
Managers	11.80
Professionals	9.22
Technicians and Associate Professionals	6.53
Clerical Support Workers	11.41
Service and Sales Workers	25.35
Skilled Agricultural, Forestry and Fisheries Worker	0.51

Plant and Machine Operators, and Assemblers	2.05
Craft and Related Trade Worker	1.53
Elementary Occupation	31.59
Total	100.00

Table 14
Distribution of Employees by Industry and Occupational Type

	Occupational Type (%)									Total
	Managers	Professionals	Technicians and Associate Professionals	Clerical Support Worker	Service and Sales Worker	Skilled Agricultural, Forestry and Fisheries Worker	Plant and Machine Operators, and Assemblers	Craft and Related Trade Worker	Elementary Occupation	
Tourism Industry										
Accommodation										
• Hotel	14.14	4.43	2.27	18.27	30.25	0.00	6.36	4.45	19.82	100.00
• Mabuhay Accommodation	11.53	20.00	4.00	12.00	28.47	4.00	0.00	0.00	20.00	100.00
Recreational Activities (Sun and Beach)	5.13	0.00	5.13	7.69	43.59	0.00	0.00	0.00	38.46	100.00
Tangible Cultural Services (Museum)	11.59	10.55	9.71	8.05	19.14	0.00	0.50	0.53	39.93	100.00

In terms of the sex distribution, male dominate across all the occupational types, with skilled AFF workers having all male employees. The highest percentage of female employees (47.12%) are in clerical support workers, which includes front office/reception types of work. This may be reflective of the stereotypical perspective that commodifies female characteristics, as Jordan (1997) as cited in the International Labour Organization (2013) had described. The study, conducted in the United Kingdom, noted that women represents “an image of the sector such as care, patience, and hospitality” therefore, giving them positions in the forefront and customer interface (Jordan, 1997 as cited in International Labour Organization, 2013).

As the Philippine tourism industry boasts of the high representation of women in the industry, it is critical to examine the specific opportunities being given to women. For instance, in Table 15, it is evident that there is little representation of female employees for highly technical and manual jobs like plant and machine operators and assemblers. Although 45.74% of the managerial positions are handled by women in the sector, inclusive and increased participation is one of the characteristics highlighted for women empowerment in TESDA’s Labor Market Intelligence Report No. 1, s. 2022 (Technical Education and Skills Development Authority, 2022).

Although we cannot generalize such observations, it can be noticed at least for the enterprises observed in this study that gender issues still exist and are prevalent especially within the tourism sector. According to the gender and development (GAD) checklist of

NEDA, gender-role stereotyping is still one of the sector’s major barriers. In formal sector employment in tourism-related industries, sex stereotyping, and sex segregation heavily influence the quality and type of work available to women. “Women are usually employed as waitresses, chambermaids, cleaners, travel agency salespersons, flight attendants, and front desk personnel. Meanwhile, men are employed as barmen, gardeners, construction workers, drivers, pilots, etc.” Traditional gender roles and gender identity give rise to such stereotypes which in turn create the idea that men and women are suitable for certain, gender-appropriate jobs (National Economic and Development Authority, 2020, 2).

Additionally, women’s roles in the tourism sector inclined to traditional societal roles (e.g. food preparation, serving, and cleaning) also represent lower pay rates, and are subjected to poor working conditions (Garofano et al., 2017, 14).

Table 15
Distribution of Employees by Occupational Type, by Sex

Occupational Type	Tourism Enterprises (%)		
	Male	Female	Total
Managers	54.26	45.74	100.00
Professionals	71.16	28.84	100.00
Technicians and Associate Professionals	58.63	41.37	100.00
Clerical Support Workers	52.88	47.12	100.00
Service and Sales Workers	69.36	30.64	100.00
Skilled Agricultural, Forestry and Fisheries Worker	100.00	0.00	100.00
Plant and Machine Operators, and Assemblers	98.75	1.25	100.00
Craft and Related Trade Worker	68.75	31.25	100.00
Elementary Occupation	71.22	28.78	100.00

The table below (Table 16) presents the different employment statuses with reference to the Integrated Survey on Labor and Employment of PSA. Although the study initially considered output-rated and commissioned workers, no respondent identified employees under the said employment status.

As seen in the table below, among the overall number of employees currently working in the participating tourism enterprises, time-rated, specifically full-time regular employees accounted for the highest distribution with 53.85%. This was followed by outsourced and full-time non-regular employees at 28.21% and 12.82 respectively. It can be observed however, that time-rated part-time employees are at the lowest with 5.13%.

Although not necessarily applicable to the tourism sector in general, it can be deduced that for the tourism enterprises observed, full-time regular employees are still more common among the other employment statuses offered.

Being the second highest among other employment statuses below, according to PSA, subcontracting is still strong in the tourism sector. Two in three establishments, according to

the agency, outsource services and jobs within their area. This equates to an estimated 70,000 employees in tourism enterprises hired through contracting agencies (The Philippine Star, 2016).

Table 16
Distribution of Employees by Employment Status

Employment Status	%
Time-rated	
• Full-time Regular	53.85
• Part time	5.13
Full-time Non-regular	12.82
Oversourced	28.21
Total	100

In connection with the previous table, in order to further specify where these employees are located, Table 17 is created wherein the distribution of employees based on their employment status as well as the industry they belong to can be referred to.

It should be noted, however, that the number of responses received per sector affects the presentation of the data below since some industries received a higher number of responses compared to others. For full-time regular employees, it can be seen that they are concentrated in the tangible cultural services industry at 49.32%, followed by the hotel industry under accommodation at 30.14%. The other subcategory for the accommodations industry, mabuhay accommodations, on the other hand, has a distribution of 13.70% while the recreational activities sector has the lowest distribution of full-time regular employees at 6.85%.

Looking at the data for the part-time employees, half (50%) of the distribution is located in the accommodations industry specifically, the hotel industry while the other half (50%) is found in the recreational activities industry.

Similar to the distribution of part-time employees, full-time regular employees were also shared by two industries: but this time, most of the distribution can be found in the accommodations-hotel industry at 58.33% while the remaining 41.67% was obtained by the tangible cultural services, specifically museums at 41.67%.

In terms of the outsourced employees, the highest distribution at 46.67% was located at the tangible cultural services industry, followed by the accommodation-hotel industry at 33.33%. The mabuhay accommodations industry was next with 13.33% while the recreational activities sector obtained the lowest distribution at 6.67%.

It can be observed that comparing the distribution of employees between those under full-time regular and outsourced, their percentages are not that far from each other. This is because seasonality and temporary or part-time employment which includes a growing rate of subcontracting and outsourcing are frequent in tourism (International Labour Organization, 2022, 36). In fact, this is exactly what they do according to a Mabuhay accommodation

enterprise, since the sector is also characterized by its seasonality, at times where customers or guests are expected to be high in number especially during what they call 'peak season', the enterprise will then hire temporary workers to help in the facility. These outsourced employees are usually those she already hired before, usually within their area, and were recommended by people the owner already knows.

Moreover during the interviews, some tourism enterprises referred to their previous employees as "on-call" since the employers cannot still provide a permanent or more regular position shortly after the re-opening but will be asked for as the need arises.

Table 17
Distribution of Employees by Industry and Employment Status

Tourism Industry	Employment Status (%)			Outsourced
	Time-rated		Full-time Non-regular	
	Full-time Regular	Part-time		
Accommodation				
• Hotel	30.14	50	58.33	33.33
• Mabuhay Accommodation	13.70	0	0.00	13.33
Recreational Activities (Sun and Beach)	6.85	50	0.00	6.67
Tangible Cultural Services (Museum)	49.32	0	41.67	46.67
Total	100.00	100.00	100.00	100.00

Similar to the preceding tables on sex distribution, female employees have lower percentages compared to male counterparts in terms of employment status. The highest share of male is outsourced at 76.27%, which is expected considering that in Table 15, the majority of the employees in the elementary occupations are male; according to interview respondents, majority of the outsourced workers are those in utility services which are part of elementary occupations.

Table 18
Distribution of Employees by Employment Status, by Sex

Employment Status	Tourism Enterprises (%)		
	Male	Female	Total
Time-rated			
• Full-time Regular	62.83	37.17	100.00
• Part time	50.00	50.00	100.00
Full-time Non-regular	71.08	28.92	100.00
Outsourced	76.27	23.73	100.00

Exploring the demographics of tourism sector employees, Table 19 presents age ranges and where on such ranges the employees of the observed tourism enterprises belong. It is to be noted that included here are only those workers paid by these enterprises, no workers were counted twice regardless if they were rehired frequently. Most of the

employees as observed below are 18 to 34 years of age as indicated by 41.03%. 30.77% of employees on the other hand, consist of those who are 35 to 44 years old while the last age group, 45 and above makes up 28.21% of the tourism employees.

The younger workforce being the highest among the age ranges below can be explained by the observation made by the Asia-Pacific Economic Cooperation (APEC), wherein such young employees are considered as the ‘frontline’ or most visible element of the tourism sector. This resulted from tourism being often viewed as a gap-filler role while studying or traveling before taking on a ‘real’ career, such a condition was utilized by tourism enterprises especially since younger employees working in SMEs entrepreneurial tourism businesses are responsible for at most 80% of the workforce. While young people seem to have a reasonably positive attitude towards long-term employment in tourism describing it as “dynamic”, “fun”, and “sociable” according to a report from the Tourism Hospitality Career in Australia, young employees still face great levels of unemployment in the sector compared to older members of the workforce since they have more years of experience securing senior and more permanent roles meanwhile pushing the youth to contingent work specifically through part-time, split-shift, and remote location work (Garofano et al., 2017, 112-113).

Table 19
Percentage of Employees by Age Group

Age Group	%
18 to 34	41.03
35 to 44	30.77
45 and above	28.21
Total	100.00

Looking at these age groups more closely, it can be seen from Table 20 that male tourism employees, at least from the enterprises observed—are higher in percentages than female employees. The highest percentage of female employees (35.57%) among these age groups are from the 35 to 44 years age range while for the males, the largest proportion (77.84%) were identified as being 45 years and above among other age ranges.

Table 20
Distribution of Employees by Age Group, by Sex

Age Group	Tourism Enterprises (%)		
	Male	Female	Total
18 to 34	67.46	32.54	100
35 to 44	64.43	35.57	100
45 and above	77.84	22.16	100

Adding the types of tourism industry into the mix, it can be observed in Table 21 that for the respondents in the hotel accommodation industry, most of their female employees (42.70%) are aged between 18 to 34 years old. For Mabuhay accommodation, the majority of the female employees—specifically 41.83%, are 45 and above in terms of age. The highest

percentage of female employees (73.81%) for recreational activities are also in the young age group of 18 to 34 years old while the opposite can be said for the tangible cultural services industry wherein the highest percentage of female employees are aged 45 and above (19.95%).

Table 21 and Table 19 correlate to ILO’s observation that while tourism typically attracts young workers, the demographic changes in such a way that the sector’s future workforce will be increasingly multigenerational and diverse (International Labour Organization, 2022, 47). However, the existence of a younger workforce was proven to be advantageous, one of the respondents under Mabuhay accommodation stated that due to the relatively young population of its workforce, the enterprise is not experiencing difficulty in terms of digital skills since their existing workers are quite familiar or are digitally savvy. With this, learning and development efforts and programs are easier to develop and provide, making trends and developments in the tourism industry—especially technological advancements, manageable and more susceptible to adaptation.

On the other hand, the recreational activities enterprise described their observations regarding their older employees stating that such employees seem to lack dreams or aspirations, the respondent also seemed to be frustrated with this matter especially since such employees also lack interest in training, mental toughness and does not seem to be interested in learning new things. Such observations align with the study from the University of National and World Economy (UNWE) wherein according to respondents, perceived disadvantages of hiring older workers include less drive than younger workers, inability to keep up with technology, fear of changes at the workplace, lower flexibility compared to younger workers, and the preference to work on known tasks with known methods (Daskalova, 2009).

The observations above do not, however, mean that older workers are more likely to be disadvantageous than younger workers in general since the employment of younger workers also comes with downsides such as lack of stability, failure to handle pressure, high dependence on technology, and generational conflict among others (Reed, 2022). Older employees in the company are also advantageous in terms of greater loyalty, beneficial experiences, established work contacts and clients, and stronger work ethic (Daskalova, 2009).

Table 21
Distribution of Female Employees by Age Group, Industry, and Sex

Tourism Industry	Age Group (years) (%)											
	18 to 34			35 to 44			45 and above			Total		
	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total
Accommodation												
• Hotel	57.30	42.70	100.00	73.14	26.86	100.00	61.37	38.63	100.00	62.25	37.75	100.00
• Mabuhay Accommodation	68.84	31.17	100.00	75.00	25.00	100.00	58.17	41.83	100.00	63.62	36.38	100.00
Recreational Activities (Sun and Beach)	26.19	73.81	100.00	0.00	0.00	0.00	33.89	66.11	100.00	30.59	69.41	100.00
Tangible Cultural Services (Museum)	83.89	16.11	100.00	80.81	19.19	100.00	80.05	19.95	100.00	80.99	19.01	100.00

Employees of the observed tourism enterprises were categorized according to another demographic, their highest educational attainment which can be referred to in Table 22. Similar to the age group, the data were obtained only from paid employees and no employees were counted twice.

Out of the listed and presented attainments below, college graduate employees are the highest with a percentage of 45.25%, this was followed by the old curriculum secondary education graduates accounting for 23.96% of the distribution. The remaining percentages were then shared by other educational levels but almost all are now less than 10%, two of these are quite higher than others being more than 5%: college graduate employees (9.57%) and old curriculum secondary education undergraduate employees (7.09%). The lowest among these educational attainments, excluding those with no percentages (primary education and no level completed) were from employees with doctoral degrees (0.12%) and K-12 lower secondary education undergraduates (0.10%)

Table 22
Distribution of Employees by Highest Educational Attainment

Highest Educational Attainment	%
No Level Completed	0.00
Primary Education (Grade 1-6)	0.00
Old Curriculum Secondary Education Undergraduate	7.09
Old Curriculum Secondary Education Graduate	23.96
K-12 Lower Secondary Education Undergraduate (<i>JHS</i>)	0.10
K-12 Lower Secondary Education Graduate (<i>JHS</i>)	1.64
K-12 Upper Secondary Education Undergraduate (<i>SHS</i>)	0.52
K-12 Upper Secondary Education Graduate (<i>SHS</i>)	2.24
TechVoc Course Undergraduate	2.00
TechVoc Course Graduate	4.33
College Undergraduate	9.57
College Graduate	45.25
Master's Degree	3.19
Doctoral Degree	0.12
Total	100.00

Such observations from Table 22 can be reflected in the table below (Table 23) wherein almost all of the tourism industries employees are mostly concentrated in the college graduate level with hotel accommodations higher than others with 69.37%, followed by the enterprise under recreational activities (44.12%), and then by the graduates from Mabuhay accommodation. For tangible cultural services, college graduate employees are placed only on the second highest with 34.65% of distribution, the highest for this industry are the old curriculum secondary education graduates consisting of 42.47% of the industry's distribution.

As for the second most common educational attainment among these industries' employees, old curriculum secondary education undergraduates are the second highest for the hotel accommodations industry while college undergraduates for Mabuhay accommodation (33.67%). For the surveyed recreational activities enterprise, TechVoc course graduates are their second most common educational attainment (24.51%) and as said earlier, college graduates for those in the tangible cultural activities industry.

The least common levels on the other hand, excluding again those that have zero percentages, consist of K-12 upper secondary education undergraduates from the hotel accommodations industry (0.17%), old curriculum secondary education undergraduates from Mabuhay accommodations (1.96%), old curriculum secondary education graduates from the respondent from the recreational activities industry (1.96%), and doctoral graduate students from tangible cultural services (0.22%).

Table 23
Distribution of Employees by Highest Educational Attainment, by Industry

Highest Educational Attainment	Tourism Industry (%)			
	Accommodation		Recreational Activities (Sun and Beach)	Tangible Cultural Services (Museum)
	Hotel	Mabuhay Accommodation		
No Level Completed	0.00	0.00	0.00	0.00
Primary Education (Grade 1-6)	0.00	0.00	0.00	0.00
Old Curriculum Secondary Education Undergraduate	12.67	1.96	0.00	6.11
Old Curriculum Secondary Education Graduate	0.83	9.80	1.96	42.47
K-12 Lower Secondary Education Undergraduate	0.33	0.00	0.00	0.00
K-12 Lower Secondary Education Graduate	0.33	6.67	0.00	1.14
K-12 Upper Secondary Education Undergraduate	0.17	0.00	9.80	0.00
K-12 Upper Secondary Education Graduate	4.50	0.00	19.61	0.00
TechVoc Course Undergraduate	0.33	0.00	0.00	3.64
TechVoc Course Graduate	1.50	11.67	24.51	2.01
College Undergraduate	6.83	33.67	0.00	5.37
College Graduate	69.37	36.23	44.12	34.66
Master's Degree	3.13	0.00	0.00	4.39
Doctoral Degree	0.00	0.00	0.00	0.22
Total	100.00	100.00	100.00	100.00

Looking at these highest educational attainments and how common these are in terms of asset size, Table 24 was created. For micro-sized enterprises, most of their employees (35.54%) are lower secondary education undergraduates (old curriculum) while the least

(excluding those with no percentages) are from the lower secondary education graduate (K-12) with 5%. Most of the employees from small-sized enterprises (41.09%) are from lower secondary education graduates (old curriculum) while the least are those with master's degrees (0.62%). College graduates make up most of the employees for medium- and large-scale enterprises (54.12 and 70.71% respectively) while the least are those with master's degrees (5.88%--medium-size enterprises) and those with doctorate degree (0.41%--large-scale enterprises).

Table 24
Distribution of Employees by Highest Educational Attainment, by Asset Size

Highest Educational Attainment	Asset Size (%)			
	Micro	Small	Medium	Large
No Level Completed	0.00	0.00	0.00	0.00
Primary Education (Grade 1-6)	0.00	0.00	0.00	0.00
Lower Secondary Education Old Curriculum Undergraduate	35.54	0.65	0.00	0.17
Lower Secondary Education Old Curriculum Graduate	19.82	41.09	20.00	2.40
Lower Secondary Education K-12 Undergraduate	0.00	0.00	0.00	0.33
Lower Secondary Education K-12 Graduate	5.00	1.39	0.00	0.33
Upper Secondary Education Undergraduate	0.00	0.00	0.00	1.83
Upper Secondary Education Graduate	6.25	0.00	0.00	3.65
TechVoc Course Undergraduate	0.00	0.00	20.00	0.33
TechVoc Course Graduate	0.00	5.28	0.00	7.25
College Undergraduate	13.57	13.41	0.00	4.34
College Graduate	19.82	37.56	54.12	70.71
Master's Degree	0.00	0.62	5.88	8.26
Doctoral Degree	0.00	0.00	0.00	0.41
Total	100.00	100.00	100.00	100.00

After looking through the distribution of employees in terms of educational attainment, Table 25 explores which of the observed tourism enterprises are part of a larger multinational organization. A multinational organization is referred to in this study as a business entity that has operations in more than one country, and it can be obviously observed that enterprises belonging to such organizations are only found in hotel accommodations.

It shall be noted, however, there are only 2 out of the 21 tourism enterprises that are part of multinational organizations. When specifically asked about the location of their main offices, an enterprise responded that their head office is located in Paris, France while another stated that it is located in the United States.

Table 25
Percentage of the Multinational Tourism Enterprises by Industry

Tourism Industry	%
Accommodation	
- Hotel	100
- Mabuhay Accommodation	0
Recreational Activities (Sun and Beach)	0
Tangible Cultural Services (Museum)	0

After identifying how much of the tourism enterprises are owned by multinational organizations, the proceeding table (Table 28) distributes their employees based on the gross monthly salary they are receiving. A large percentage of employees (50.43%) are being given a salary above the minimum wage but not more than Php 26,000. Next to these employees are those that earn minimum wages and below (28.79%) while 16.57% are currently earning a salary of Php 26,000 to less than Php 50,000. Second to the least of the distribution includes those that are given Php 50,000 to less than Php 70,000 as their salary (2.64%) while the lowest percentage of 1.58% were distributed to those employees having Php 70,000 or more gross monthly salary.

Table 26
Distribution of the Employees by Gross Monthly Salary

Gross Monthly Salary (Php)	%
Minimum wage or below	28.79
Above minimum wage to less than 26,000	50.43
26,000 to less than 50,000	16.57
50,000 to less than 70,000	2.64
70,000 or more	1.58
Total	100.00

Examining these monthly salaries per industry in Table 27, it can be observed that the observation above is reflected since most of the employees under all of the industries observed acquire a monthly salary above the minimum wage but not more than Php 26,000: the enterprise from the recreational activities declared that 70% of their employees are being given such salary range, for Mabuhay accommodations 62.75%, for the hotel accommodation enterprises 51.23% while for tangible cultural services, 44.85% of employees.

Similar above, the monthly salary enjoyed by the least number of employees applicable to all the industries observed is the salary range of Php 70,000 and above: only 5% for the recreational activities enterprise, 3.33% of the employees from hotel accommodation enterprises, 0.74% from tangible cultural services industry while none are receiving such monthly salary from the enterprises under mabuhay accommodations.

Table 27*Distribution of Employees by Gross Monthly Salary, by Industry*

Tourism Industry	Gross Monthly Salary (in Php) (%)					Total
	Minimum wage or below	Above minimum wage to less than 26,000	26,000 to less than 50,000	50,000 to less than 70,000	70,000 or more	
Accommodation						
• Hotel	25.00	51.23	15.94	4.50	3.33	100.00
• Mabuhay Accommodation	33.33	62.75	1.96	1.96	0.00	100.00
Recreational Activities (Sun and Beach)	0.00	70.00	15.00	10.00	5.00	100.00
Tangible Cultural Services (Museum)	32.23	44.85	21.03	1.15	0.74	100.00

Micro-sized hotel and Mabuhay accommodation enterprises offer their employees a monthly salary based on the minimum wage or lower while most (40.18%) of the micro-enterprises under tangible cultural services provide a salary above the minimum wage but not more than Php 26,000 to their employees. The majority of employees under small-sized hotels, mabuhay accommodation, and tangible cultural services are being paid a monthly salary above the minimum wage but less than Php 26,000 (80%, 94.12%, and 47.96% respectively).

For medium-sized enterprises which consist only of hotel accommodation and tangible cultural services industries (since enterprises under Mabuhay accommodation are only micro- to small-sized and the enterprises under recreational activities are considered to be large-scale), a large percentage of employees from hotel accommodation (82.35%) are obtaining a monthly salary above the minimum wage to less than Php 26,000 while for the tangible cultural services, the major percentage (40%) consist of those that are paid with a minimum wage salary and below.

Lastly, for the large-scale enterprises, the largest number of employees in all of the industries are being given a salary above the minimum wage but not more than Php 26,000 except Mabuhay accommodation: 48.33% of employees from hotel accommodation industries, 70% from the recreational enterprise employees, and 47.62% from the employees of tangible cultural service enterprises.

It may be observed that as the asset size of the tourism enterprise becomes bigger, so is its capacity to provide a higher gross monthly salary to the employees. The capacity of the enterprises to provide a higher salary may be attributed to the availability of the occupations, the type of positions, and the complexity of the jobs. For instance, in the case of the accommodation industry, the various classifications of accommodation generally lie in the number of rooms, the size of the rooms, the facilities offered, and the type of workers needed.

Table 28
Distribution of Employees by Gross Monthly Salary, Industry, and Asset Size

Asset Size	Tourism Industry	Gross Monthly Salary (in Php) (%)					Total
		Minimum wage or below	Above minimum wage to less than 26,000	26,000 to less than 50,000	50,000 to less than 70,000	70,000 or more	
Micro	Accommodation						
	• Hotel	100	0	0	0	0	100.00
	• Mabuhay Accommodation	100	0	0	0	0	100.00
	Recreational Activities (Sun and Beach)	0	0	0	0	0	0.00
	Tangible Cultural Services (Museum)	33.93	40.18	25.89	0	0	100.00
Small	Accommodation						
	• Hotel	0	80	20	0	0	100.00
	• Mabuhay Accommodation	0	94.12	2.94	2.94	0	100.00
	Recreational Activities (Sun and Beach)	0	0	0	0	0	0.00
	Tangible Cultural Services (Museum)	41.11	47.96	10.93	0.00	0.00	100.00
Medium	Accommodation						
	• Hotel	0	82.35	17.65	0	0	100.00
	• Mabuhay Accommodation	0	0	0	0	0	0.00
	Recreational Activities (Sun and Beach)	0	0	0	0	0	0.00
	Tangible Cultural Services (Museum)	40	30	30	0	0	100.00
Large	Accommodation						
	• Hotel	16.67	48.33	19.33	9.00	6.67	100.00
	• Mabuhay Accommodation	0.00	0.00	0.00	0.00	0.00	0.00
	Recreational Activities (Sun and Beach)	0.00	70.00	15.00	10.00	5.00	100.00
	Tangible Cultural Services (Museum)	0.00	47.62	42.02	6.32	4.05	100.00

4.2 Critical Human Resources

Tables 29 and 30 investigate the educational qualifications required for the vacancies as observed when the tourism enterprises opened during their recruitment in 2021. Out of all the qualifications below, the enterprises across all the tourism industries opened positions that mostly require college graduates among others, specifically 50.61% of the total vacancies.

Despite the educational background, the industry noted that since within the first two years of the pandemic, the new graduates were out of training and school, there are not enough workers with the required skills following the economy's re-opening. Hence, the need for a refresher course on the basics and standards of the industry has been highlighted.

Second to this are vacancies for old curriculum secondary education graduates which consists of 19.54% of available positions. Going back again to Table 30, the same observation (the educational qualification being the second highest) can be said for mabuhay accommodation (44.12%) and tangible cultural service enterprises (28.06%) but for the enterprises under hotel accommodation, college undergraduates are more prioritized for the second highest vacancies (22.20%) while the remaining 10% from the enterprise under recreational activities, these positions were offered to TechVoc course graduates.

College undergraduates were given 16.14% of vacancies next but for the three remaining industries, the third most needed qualifications were K-12 upper secondary education undergraduates for hotel accommodations (12% of vacancies), TechVoc course and graduates and college undergraduates for Mabuhay accommodation enterprises (both at 5% of vacant positions), and college undergraduates also for tangible cultural service enterprises (17.15% of vacancies).

The qualification with the least open vacancies (aside from those with no indicated percentages—no level completed, primary education graduates, K-12 lower secondary education graduates, and undergraduates, K-12 upper secondary education graduates, TechVoc course undergraduates, and doctorate graduates) are those with master's degrees (2.74%).

Although vacancies still exist in the tourism enterprises observed, some of the respondents stated that their businesses were discontinued and were only reopened during the given year 2021, this, in turn, resulted in the unavailability of open positions and non-applicability of the specific question for this section to some enterprises.

Table 29
Distribution of the Vacancies in the Tourism Enterprises by Required Educational Qualification

Required Educational Qualification	%
No Level Completed	0.00
Primary Education (Grade 1-6)	0.00
Old Curriculum Secondary Education Undergraduate	3.51
Old Curriculum Secondary Education Graduate	19.54
K-12 Lower Secondary Education Undergraduate	0.00
K-12 Lower Secondary Education Graduate	0.00
K-12 Upper Secondary Education Undergraduate	3.75
K-12 Upper Secondary Education Graduate	0.00
TechVoc Course Undergraduate	0.00
TechVoc Course Graduate	3.71

College Undergraduate	16.14
College Graduate	50.61
Master's Degree	2.74
Doctoral Degree	0.00
Total	100.00

Table 30

Distribution of the Vacancies in the Tourism Enterprises by Required Educational Qualification, by Industry

Required Educational Qualification	Tourism Industry (%)			
	Accommodation		Recreational Activities (Sun and Beach)	Tangible Cultural Services (Museum)
	Hotel	Mabuhay Accommodation		
No Level Completed	0.00	0.00	0.00	0.00
Primary Education (Grade 1-6)	0.00	0.00	0.00	0.00
Old Curriculum Secondary Education Undergraduate	0.00	0.00	0.00	7.02
Old Curriculum Secondary Education Graduate	0.00	44.12	0.00	28.06
K-12 Lower Secondary Education Undergraduate	0.00	0.00	0.00	0.00
K-12 Lower Secondary Education Graduate	0.00	0.00	0.00	0.00
K-12 Upper Secondary Education Undergraduate	12.00	0.00	0.00	0.00
K-12 Upper Secondary Education Graduate	0.00	0.00	0.00	0.00
TechVoc Course Undergraduate	0.00	0.00	0.00	0.00
TechVoc Course Graduate	4.00	5.00	10.00	2.42
College Undergraduate	22.20	5.00	0.00	17.15
College Graduate	61.80	45.88	90.00	39.88
Master's Degree	0.00	0.00	0.00	5.47
Doctoral Degree	0.00	0.00	0.00	0.00
Total	100.00	100.00	100.00	100.00

Based on Table 31 below, the employee size from 2021 to 2022 increased for 38.10% of the participating tourism enterprises. This is attributed to all tourism industries except Mabuhay Accommodation, where none of the tourism enterprises in this tourism industry experienced an increase in employee size, as seen in Table 32.

Moreover, the largest percentage of tourism enterprises in Recreational Activities (Sun and Beach) and Tangible Cultural Services (Museum) increased their employee size (Table 32).

Meanwhile, a similar percentage of 38.10% of all participating tourism enterprises experienced no change in employee size during the same period. This accounts for the vast majority of Accommodation's tourism enterprises.

Such observations are aligned with the fact that during the given years 2021 to 2022, closed businesses are now slowly recovering and opening—from 38 down to 16% (Crisundo, 2021). Such reopening would mean more demand for jobs and data shows that employment in the tourism sector is starting to increase again following its performance from 4.68 million employed in 2020 to 4.90 million in 2021 (Statista, 2022).

But as seen below, the percentage of responses under ‘no change’ and ‘increased’ were the same, this may be explained by the answers of some enterprises during the survey interviews conducted that although there had been a large decrease in the number of employees during the pandemic, hiring decisions “depend on the organization or association we belong”, especially for museums that are under the National Museum’s management. Hiring also requires budget and resources and given that the tourism sector like many other sectors is in the recovery period, cost-effective plans should be in place.

Table 31

Distribution of the Tourism Enterprises by Status of Employee Size, 2021 to 2022

Status of Employee Size	%
Decreased	23.81
No Change	38.10
Increased	38.10
Total	100.00

Table 32

Distribution of the Tourism Enterprises by Status of Employee Size, by Industry (2021 to 2022)

Tourism Industry	Status of Employee Size (%)			
	Decreased	No Change	Increased	Total
Accommodation				
• Hotel	16.67	50.00	33.33	100.00
• Mabuhay Accommodation	33.33	66.67	0.00	100.00
Recreational Activities (Sun and Beach)	0.00	0.00	100.00	100.00
Tangible Cultural Services (Museum)	27.27	27.27	45.45	100.00

Tables 33 and 34 below show the distribution of the separated employees from the tourism enterprises in 2021. Instances of absence without leave (AWOL) were also considered in

this study under “termination of contract.” AWOL is defined in this study as the continuous absence for at least 30 working days and shall be separated from the service or dropped from the roles without prior notice.

As shown in Table 33, the majority of the employees left the tourism enterprises due to resignation (69.20%). In Table 34, it can be seen that this is true for the majority of the tourism enterprises in all of the tourism industry except for Mabuhay accommodation, in which the reasons for separation are equally distributed among resignation, end of contract, and termination of contract.

It may be worth noting that while resignation is the reason for separation for the majority of Tangible Cultural Services (Museum) employees, a comparable percentage of 45.65% of employees have left the tourism enterprise due to retirement. This coincides with the observations made in Table 21 wherein it was seen that for the tangible cultural services enterprises, most of the employees both male and female are quite high in percentage—especially the females, belonging under the 45 and above age group. (80.08% males, 19.95% females).

Resignation being the highest among these reasons can be related to the data that the Philippines experienced a 176% increase in voluntary resignations across all industries during the health crisis, this global phenomenon was referred to as “The Great Resignation” (MindYou, 2022). Although the trend was seen in different industries, it was noticed that companies involved in the services sector, especially health care, education, and hospitality saw the highest rate of employee resignations around the world (which is true as seen in Table 34). A study was conducted and it was revealed that 83% of surveyed respondents are planning to resign in 2022, 9% are unsure, and only 8% are planning to stay in their current jobs (Daxim, 2022).

Table 33.
Distribution of Separated Employees from the Tourism Enterprises by Reason for Leaving

Reason for Leaving	%
Resignation	69.20
End of Contract	3.61
Termination of Contract	3.69
Retirement	23.49
Total	100.00

Table 34.
Distribution of Separated Employees from the Tourism Enterprises by Reason for Leaving, by Industry

Tourism Industry	Reason for Leaving (%)				Total
	Resignation	End of Contract	Termination of Contract	Retirement	
Accommodation					
• Hotel	95.25	2.50	0.25	2.00	100.00
• Mabuhay	33.34	33.33	33.33	0.00	100.00

Accommodation					
Recreational Activities (Sun and Beach)	90.00	0.00	10.00	0.00	100.00
Tangible Cultural Services (Museum)	54.35	0.00	0.00	45.65	100.00

Relative to the tourism enterprises that have lost a percentage of their employees due to resignation, specific reasons are listed in Table 35. As the table shows, there are a variety of reasons for employee resignation across the tourism industry. The most frequently cited reasons are management/supervisor-related and the desire for higher pay and better job opportunities (including job security). Given that some employees are hired on a temporary basis added to the uncertainties on the sector's recovery, the desire for a more permanent job and the movement to other industries are inevitably significant reasons for resignation.

Moreover, the COVID-19 pandemic undoubtedly had an impact on the tourism industry, particularly Mabuhay Accommodation and Tangible Cultural Services (Museum). The pandemic was seen to have caused widespread forced unemployment. In fact, according to DOLE, an estimated number of 420,000 Filipinos lost their jobs in 2020 due to discontinued business operations. Moreover, unemployed Filipinos are doubling in number from 2.4 million in January 2020 to almost 4 million by January 2021. In connection to the identified reasons below, it was found that major reasons for leaving work aside from forced unemployment include work-life balance, uncertainty over the recession, salary cuts, availability of benefits from competitors, lack of career development and advancement, and lack of training for leadership and management chains promoting psychologically safe workspaces (MindYou, 2022).

Table 35
Identified Reasons for Resignation by Industry

Tourism Industry	Reasons for resignation
Accommodation	
<ul style="list-style-type: none"> ● Hotel 	<ul style="list-style-type: none"> ○ Work Overseas/Abroad ○ Better Opportunity/Work Opportunities ○ Better Salary ○ Personal Reason ○ Joined other employer (different industry) ○ Joined other employer (same industry/competitor) ○ Went into personal business
<ul style="list-style-type: none"> ● Mabuhay Accommodation 	<ul style="list-style-type: none"> ○ The facility is not generating income due to the pandemic. ○ Employees are temporarily hired. ○ Employees found a better and more regular job.
Recreational Activities (Sun and Beach)	<ul style="list-style-type: none"> ○ Work environment (Malungkot) (Geographical Location) ○ Management (boss)

Tourism Industry	Reasons for resignation
Tangible Cultural Services (Museum)	<ul style="list-style-type: none"> ○ Change of job ○ Higher offer in government job ○ Covid ○ Insufficient funds ○ Dissatisfaction with supervisor or co-worker ○ Dissatisfaction with salary and benefits ○ Pregnancy and/or home/family needs

Current employees across the tourism industries are distributed according to the percentage of those who will be difficult to replace within three months of resignation, as summarized in Table 36. It can be seen that the distribution is almost equally distributed for all of the tourism industries except for Recreational Activities (Sun and Beach) where 100% will have difficulty replacing 10-50% of their current employees. However, note that this only accounts for one participating tourism enterprise.

Table 36.
Distribution of Current Employees who would be Difficult to Replace Within Three Months of Resignation

Tourism Industry	Tourism Enterprises (%)				Total
	None	< 10	10-50	> 50	
Accommodation					
• Hotel	33.33	33.33	16.67	16.67	100.00
• Mabuhay Accommodation	33.33	33.33	33.33	0.00	100.00
Recreational Activities (Sun and Beach)	0.00	0.00	100.00	0.00	100.00
Tangible Cultural Services (Museum)	36.36	9.09	45.45	9.09	100.00

In connection to the previous table, Table 37 now dives deeper and explores what specific job positions will be difficult to replace once an employee resigns. Culinary/chef/cook/kitchen staff or F&B positions, in general, are common among hotel, mabuhay accommodation, and recreational activities. Another is housekeeping, common for both Mabuhay accommodation and the recreational activities industry. Administrative officers are also common for both the Mabuhay accommodation and tangible cultural services.

Aside from engineering staff and finance staff or cashiers, most of the jobs identified in the hotel accommodation industry are in executive or managerial positions specifically, managers and executives, general managers, hotel managers, HR supervisors, directors, and other licensed jobs. The operations manager is also included in the Mabuhay accommodation together with the front desk and laundry officers.

Aside from directors, enterprises under the tangible cultural services identified job positions quite specific to their industry such as shrine curator II, museum guides, museum technicians, museum curators, museum researchers, and docents. They also included regular employees and utility and security personnel for this section.

According to the tangible cultural enterprise interviewed, in curatorship, there is yet an available course specific to museum curation, most commonly known as museology. As a result, curators found in the country were hired based on their background or experience from other museums. There are also not that many museums found in the Philippines, museum personnel usually do not want to move to other museums because they are already used to the culture and type of work they do in their respective museums. With such a low supply of employees, especially curators, museum guides, and technicians, it is difficult to find and hire additional workforce.

Table 37.
Identified Jobs that will be Difficult to Replace in Case of Resignation

Tourism Industry	Jobs that are difficult to replace
Accommodation	
<ul style="list-style-type: none"> ● Hotel 	<ul style="list-style-type: none"> ○ Culinary/ Chef / Cook/ Kitchen Staff ○ Managers and Executives ○ General Manager ○ Hotel Manager ○ HR supervisor ○ Directors ○ License Jobs ○ Engineering staff ○ Finance Staff/Cashiers
<ul style="list-style-type: none"> ● Mabuhay Accommodation 	<ul style="list-style-type: none"> ○ Operations Manager ○ Administrative Officer ○ Cook ○ Housekeeping ○ Front Desk ○ Laundry
Recreational Activities (Sun and Beach)	<ul style="list-style-type: none"> ○ Housekeeping ○ Kitchen Staff ○ F&B
Tangible Cultural Services (Museum)	<ul style="list-style-type: none"> ○ Shrine Curator II ○ Museum Guide ○ Museum Technician ○ Museum Curator ○ Museum Researcher ○ Director ○ Docent ○ Regular Employees ○ Utility Personnel ○ Security Personnel ○ Administrative Officers

Table 38 below investigates if there is a fast turnover among the different tourism enterprises observed. Fast turnover involves the difficulty of retaining employees for more than six (6) months of their stay. Although the recreational activities industry obtained a percentage of

100, it has to be noted that only one respondent answered for this industry, which explains why such a percentage is at the maximum. It can still be concluded, however, that the enterprise under this industry still experienced a fast turnover. Therefore, if the recreational activities industry were disregarded due to its low number of respondents, hotel accommodations would have the highest responses when it comes to fast turnover (50%). Mabuhay accommodations followed this with 33.33% while tangible cultural services have the least number of responses or enterprises with fast turnovers at 18.18%.

Fast turnovers can be explained by the tourism sector’s seasonality and fluctuations, especially at the entry level. The demand for employment in the tourism sector does not usually provide long-term and sustained opportunities, especially for those who want to be employed in jobs in the said sector. The DOT described such conditions as “ad hoc, informal, and lacking professional standards” (Department of Tourism, 2021a, 34) resulting in high labor turnover and can be considered as one of the major barriers to the recruitment of quality tourism professionals.

Table 38.
Percentage of Tourism Enterprises with Fast Turnover per Industry

Tourism Industry	%
Accommodation	
• Hotel	50.00
• Mabuhay Accommodation	33.33
Recreational Activities (Sun and Beach)	100.00
Tangible Cultural Services (Museum)	18.18

Looking at these turnovers more specifically, it can be observed from the table below (Table 39) that service and sales workers have the fastest turnover at least according to the participating tourism enterprises (71.43%). Second to these are the managers as responded by 57.14% of the surveyed enterprises. Professionals and workers under elementary occupations followed with 42.86%, while technicians and associate professionals, clerical support workers, and craft and related trade workers received the same number of responses at 28.57%. Plant and machine operators, and assemblers as well as skilled agricultural, forestry, and fisheries workers obtained no responses (0%) as such occupations are deemed not applicable or not yet existing in the tourism enterprises that answered the survey.

When linked to Table 13 (Distribution of Employees by Occupational Type), it is noticeable that although in a different order, the same top three occupational types have the fastest turnover rate (*Service and Sales Workers, Managers, and Elementary Occupations*). This may indicate that the most number of occupations needed by the tourism industries are likewise the same that are difficult to retain, which may pose an implication to the capacity of the enterprises to ensure the provision of quality services — an attribute crucial for the services sector like Tourism.

Table 39.
Percentage of Tourism Enterprises with Fast Turnover by Occupational Type

Occupational Type	%
Manager	57.14
Professionals	42.86
Technicians and Associate Professionals	28.57
Clerical Support Workers	28.57
Service and Sales Workers	71.43
Skilled Agricultural, Forestry, and Fisheries Worker	0.00
Plant and Machine Operators, and Assemblers	0.00
Craft and Related Trade Worker	28.57
Elementary Occupation	42.86

Note: Multiple responses were allowed.

Combining the fast turnovers per occupation and industry, Table 40 can be referred to below. For the hotel accommodations industry, most of the responses specifically 18.18% stated that managers, clerical support, services and sales workers, and elementary occupations are those that have fast turnovers. All of the respondents in the Mabuhay accommodation industry responded that service and sales workers have the fastest turnover rates among other occupations. Responses of the enterprise under the recreational activities industry are divided among managers, professionals, technicians and associate professionals, and craft and related trade workers (25%). Most of the tangible cultural services (40%) agreed that service and sales workers have the fastest turnover rate.

It can be said that such observation parallels with the previous table above that service and sales workers are considered as the occupational type with the fastest turnover rate among the other presented occupations, as most of the respondents per industry are concentrated in this occupational type.

Table 40.
Distribution of Tourism Enterprises with Fast Turnover by Industry, by Occupational Type

Tourism Industry	Occupational Type (%)									Total
	Manager	Professionals	Technicians and Associate Professionals	Clerical Support	Service and Sales Workers	Skilled Agricultural, Forestry, and Fisheries Worker	Plant and Machine Operators, and Assemblers	Craft and Related Trade Worker	Elementary Occupation	
Accommodation										
• Hotel	18.18	9.09	9.09	18.18	18.18	0.00	0.00	9.09	18.18	100.00
• Mabuhay Accommodation	0.00	0.00	0.00	0.00	100.00	0.00	0.00	0.00	0.00	100.00
Recreational Activities (Sun and Beach)	25.00	25.00	25.00	0.00	0.00	0.00	0.00	25.00	0.00	100.00
Tangible Cultural Services (Museum)	20.00	20.00	0.00	0.00	40.00	0.00	0.00	0.00	20.00	100.00

Note: Multiple responses were allowed.

Table 41 presents the possible reasons why enterprises have difficulties in retaining their employees and investigates as well, the most common factors for these fast turnovers.

Unattractive conditions of employment and other factors are the reasons that received the most number of responses from the observed tourism enterprises with both at 42.86%. These were then followed by four other reasons with 28.57% of the responses, specifically low wages offered compared to other facilities or companies, staff that are not interested in a long-term commitment, shift to other opportunities locally or abroad, and poaching which refers to the practice of hiring current or former employees from a competitor or a similar company.

One of the associations emphasized that domestically, one of the practices is for the bigger establishments to poach employees from smaller establishments; whereas on a much bigger scale, employees especially from the hotel and restaurant industries are being pirated by the cruise line industry and hotel industry abroad (e.g., South Korea, Japan, and other countries). The industry laments that the employees will be trained extensively only to find other employment. This is driven by the desire to earn more and acquire more benefits.

All other factors or reasons are the same in terms of percentages (14.29%) which are also considered as the reasons with the least number of responses, these include the geographical location of the facility, lack of career prospects, long working hours, unsocial hours (night shifts), not enough people interested in the line of work they belong, and lack of access to training.

When it comes to the other reasons mentioned earlier, an enterprise in the hotel accommodations industry indicated that 'benefits' are one of the reasons. A recreational activities respondent added that 'online work or the work-from-home setup' is preferred by those who left while for a tangible cultural services enterprise, employee retention is difficult since most of their employees are outsourced. They have no control in terms of the hiring and employment process of new employees since such employees were hired by the larger establishment in which the enterprise is under and these employees are also usually hired temporarily.

In connection with the top factor (unattractive conditions of employment) and the other reasons raised by the enterprises, as mentioned earlier "The Great Resignation" and quiet quitting also occurred due to the pandemic. Many employees during the health crisis were stuck at home, working remotely, as a result, they got the opportunity to reevaluate their work-life balance and such employees realized that they had to make some changes. In fact, according to a study by PageGroup, "a significant 67 percent of respondents are willing to accept a lower salary, or forgo a pay rise or promotion for better work-life balance, overall well-being, and happiness" (Daxim, 2022).

In addition to employment conditions being unattractive, the respondent belonging under the recreational activities industry stated that some employees consider their work unappealing because they are required to be "out in the sun" adding a motivation to pursue work-from-home jobs.

Table 41.
Percentage of Tourism Enterprises with Fast Turnover per Reason for the Difficulty in Retaining Employees

Reasons	%
Low wage offered compared to other facilities/companies	28.57
Geographical location of the facility	14.29
Unattractive conditions of employment (e.g. risky job, etc.)	42.86
Lack of career prospect	14.29
Long working hours	14.29
Unsocial hours (night shift)	14.29
Not enough people who are interested in this type of work	14.29
Staff are not interested in long term commitment	28.57
Poaching	28.57
Lack of access to training	14.29
Shift to other employment opportunities locally or abroad	28.57
Others	42.86
• Benefits	
• Online work/WFH setup is preferred	
• Most employees are outsourced	

Note. Multiple responses were allowed.

The question is only applicable to seven tourism enterprises as the others do not have a fast turnover.

Looking at these reasons by industry (Table 42), it can be observed that the reason with the most responses earlier—low wages offered compared to other facilities or companies are agreed upon by all of the hotel accommodation respondents. Aside from such a reason, lack of career prospects, long working hours, unsocial hours, staff not being interested in long-term commitment, and lack of access to training also obtained 100% of the responses from the hotel accommodation industry. Mabuhay accommodation enterprises on the other hand, only identified poaching as their reason for the fast turnover, specifically 50% of them. The geographical location of the facility and the lack of people who are interested in the type of work they offer are identified by the observed recreational activities enterprise as the main reasons for the industry’s fast turnover. Meanwhile, enterprises (50%) under the tangible cultural services aside from the other reasons as seen below, have a problem with employees shifting to other employment opportunities either locally or abroad.

Table 42.
Distribution of Tourism Enterprises with Fast Turnover per Reason for the Difficulty in Retaining Employees, by Industry

Reasons	Tourism Industry (%)				Total
	Accommodation		Recreational Activities (Sun and Beach)	Tangible Cultural Services (Museum)	
	Hotel	Mabuhay Accommodation			
Low wage offered compared to other facilities/companies	100.00	0.00	0.00	0.00	100.00
Geographical location of the	0.00	0.00	100.00	0.00	100.00

Reasons	Tourism Industry (%)				Total
	Accommodation		Recreational Activities (Sun and Beach)	Tangible Cultural Services (Museum)	
	Hotel	Mabuhay Accommodation			
facility					
Unattractive conditions of employment (e.g. risky job, etc.)	66.67	0.00	33.33	0.00	100.00
Lack of career prospect	100.00	0.00	0.00	0.00	100.00
Long working hours	100.00	0.00	0.00	0.00	100.00
Unsocial hours (night shift)	100.00	0.00	0.00	0.00	100.00
Not enough people who are interested in this type of work	0.00	0.00	100.00	0.00	100.00
Staff are not interested in long term commitment	100.00	0.00	0.00	0.00	100.00
Poaching	50.00	50.00	0.00	0.00	100.00
Lack of access to training	100.00	0.00	0.00	0.00	100.00
Shift to other employment opportunities locally or abroad	50.00	0.00	0.00	50.00	100.00
Others	33.33	0.00	33.33	33.33	100.00

Note. Multiple responses were allowed.

These reasons and factors for the difficulty in employee retention were further observed in terms of employee and asset sizes seen below in Table 43. Interestingly, for micro-enterprises both in terms of employee and asset size, aside from the 33.33% of responses in 'Others', no other reasons were identified. As for the small-sized enterprises, lack of career prospects, long working hours, reporting at unsocial hours (night shifts), and shift to other employment opportunities locally or abroad are among the reasons which most if not all, responses are at 100% (in terms of employee and asset size).

Several reasons identified by most of the respondents under the medium-sized enterprises do not coincide in terms of employee and asset size. Observing the table below, in terms of employee size, geographical location of the facility, and not enough people interested in the type of work are classified as the enterprises' main reasons for fast turnover. However, while looking in terms of asset size, lack of career prospects was seen as the main reason according to 84% of medium-sized enterprises.

For large enterprises in terms of employee size, low wages offered compared to other facilities or companies and the lack of access to training are identified as major reasons (100% of respondents) while for the same enterprise size in terms of asset size, aside from these two reasons, all of the respondents (100%) also identified geographical location of the facility or workplace and insufficiency of people not interested in the type of work and 84% also identified lack of career prospects.

Table 43.

Percentage of Tourism Enterprises with Fast Turnover by Reason for the Difficulty in Retaining Employees, by Enterprise Size

Reasons	Enterprise Size (%)									
	Employee Size					Asset Size				
	Micro	Small	Medium	Large	Total	Micro	Small	Medium	Large	Total
Low wage offered compared to other facilities/companies	0.00	0.00	0.00	100.00	100.00	0.00	0.00	0.00	100.00	100.00
Geographical location of the facility	0.00	0.00	100.00	0.00	100.00	0.00	67.00	0.00	100.00	167.00
Unattractive conditions of employment (e.g. risky job, etc.)	0.00	33.33	33.33	33.33	100.00	0.00	33.33	0.00	66.67	100.00
Lack of career prospect	0.00	100.00	0.00	0.00	100.00	0.00	83.00	84.00	85.00	252.00
Long working hours	0.00	100.00	0.00	0.00	100.00	0.00	100.00	0.00	0.00	100.00
Unsocial hours (night shift)	0.00	100.00	0.00	0.00	100.00	0.00	100.00	0.00	0.00	100.00
Not enough people who are interested in this type of work	0.00	0.00	100.00	0.00	100.00	0.00	0.00	0.00	100.00	100.00
Staff are not interested in long term commitment	0.00	50.00	0.00	50.00	100.00	0.00	50.00	0.00	50.00	100.00
Poaching	0.00	50.00	0.00	50.00	100.00	0.00	50.00	0.00	50.00	100.00
Lack of access to training	0.00	0.00	0.00	100.00	100.00	0.00	0.00	0.00	100.00	100.00
Shift to other employment opportunities locally or abroad	0.00	100.00	0.00	0.00	100.00	0.00	100.00	0.00	0.00	100.00
Others	33.33	0.00	33.33	33.33	100.00	0.00	33.33	0.00	66.67	100.00

Note. Multiple responses were allowed.

As part of skills anticipation, the enterprises were provided a list of jobs and skills requirements based on their particular tourism industry and value chain to determine which of these requirements would be demanded in the next five years. Additional jobs and skills requirements may also be given if necessary. Table 4 presents the list of the jobs/skills per tourism industry and value chain and respondents were specifically asked if the requirement is applicable to their industry.

For the Accommodation Tourism Industry, the majority of the enterprises identified the following as applicable: *Food Production* (Executive Chef, Banquet Head Cook/Chef, Head Chef); *Front Office* (Front Office Manager, Front Office Supervisor, Guest Staff, Hotel Front Desk Clerk, Hotel Receptionist, Reservation Clerk, Bell Boy, Luggage Porter); *Housekeeping* (Executive Housekeeper, Floor Supervisor, Floor Supervisor, Room Attendant); *Others* (Hotel Manager).

For Recreational (Sun and Beach), the following are identified as the top requirements that are applicable: Beach Resort Experience Manager/Beach Resort Manager, Sea Patrol (Bantay Dagat), Surf Instructor, Sailing Coach, Environmental Officer, Safety Officer, Boat Operator.

For Tangible Cultural Heritage, the majority of the enterprises identified the following as applicable: Museum Researcher, Library Technician, Documentation Specialist, Records Manager, Preventive Site Maintenance, Park Sweeper, Acoustic Design, and Photogrammetry.

The other applicable requirements across all of the tourism industries are as follows: Human Resource Assistant, Purchasing Officer, Security Guard, and Maintenance Technician.

In terms of the percentage share, the majority of the jobs and skills requirements are identified as not applicable by most of the tourism enterprises. For the accommodation industry, only 14 of 58 jobs/skills (24.14%) are applicable to the majority of the enterprises; for the recreational (sun and beach) 7 of 10 jobs/skills (70%) are applicable to the majority of the enterprises, for the housekeeping 8 of 31 job/skills (25.81%) are applicable to the majority of the enterprises, and for the cross-sectoral requirements only 4 of 52 job/skills (7.69%) are applicable to the majority of the enterprises.

Among the list of requirements, there are four that are considered as not applicable by all of the tourism enterprises; as such removed from the next table (Table 45): Recreation Facilities Attendant/Aide, Facilitator, Lecturer, and Researcher.

Table 44

Percentage of Tourism Enterprises Based on the Applicability of the Skills Needs Requirements to their Industry

Tourism Industry	Value Chain	Skills/Jobs	%
Accommodation	Food Production	Executive Chef	66.67
		Banquet Head Cook/Chef	55.56
		Head Chef	55.56
		Head Cook	44.44
		Chef de Partie - Main Course Chef	44.44
		Chef de Partie - Entremetier	44.44
		Chef de Partie - Saucier	44.44
		Chef de Partie - Butcher Chef	44.44
		Commis Chef	44.44
		Commis Helper	44.44
		Demi Chef	33.33
		Sous-chef	44.44
		R&D Chef	22.22
		Kitchen Assistant/Kitchenhand/Kitchen Porter	44.44
		Kitchen Manager/Supervisor	33.33
		Pantry Attendant	33.33
		Roundsman	22.22
		Dishwasher	44.44
		Baker (general)	44.44
		Patissier and Confectioner	44.44
Delivery Helper	22.22		

Tourism Industry	Value Chain	Skills/Jobs	%
		Deliveryman/crew	22.22
		Food Safety Officer	44.44
		Muslim Friendly Food Production (Halal Muslim)	33.33
		Food Handling and Sanitation	44.44
	Front Office	Front Office Manager	75.00
		Guest Relations Manager	50.00
		Front Office Supervisor	75.00
		Guest Staff	57.14
		Hotel Attendants	42.86
		Hotel Front Desk Clerk	71.43
		Hotel Receptionist	75.00
		Reservation Clerk	57.14
		Bell Boy/Luggage Porter	57.14
		Concierge	42.86
		Housekeeping	Executive Housekeeper
	Assistant Executive Housekeeper		37.50
	Floor Supervisor		62.50
	Laundry Manager		25.00
	Laundry Supervisor		25.00
	Laundry Attendant		50.00
	Laundry Worker/Operator (Hand or Machine)		25.00
	Laundry Valet/Runner		25.00
	Presser (Hand or Machine)		25.00
	Linen Attendant		37.50
	Tailor and Seamstress		37.50
	Room Attendant		87.50
	Window Cleaner		25.00
	Cloakroom Attendant		12.50
	Others	Hotel Manager	100.00
		Hotel Supervisor	50.00
		Head Gardener	25.00
		Gardener	37.50
Landscaper		37.50	
Florist		37.50	
Butler		37.50	
House Detective (hotel)		37.50	
Pool Lifeguards		50.00	
Recreational (Sun and Beach)	-	Beach Resort Experience Manager/Beach Resort Manager	54.55
		Beach Recreation Associate	45.45
		Sea Patrol (Bantay Dagat)	100.00

Tourism Industry	Value Chain	Skills/Jobs	%
		Surf Instructor	54.55
		Underwater Diving Instructor	36.36
		Sailing Coach	54.55
		Environmental Officer	100.00
		Safety Officer	81.82
		Boat Operator	90.91
		Beach Lifeguards	18.18
Tangible Cultural Heritage	-	Gallery Assistant	36.36
		Gallery Technician	9.09
		Art Gallery/Museum Curator	27.27
		Painting Restorer	45.45
		Picture Restorer	27.27
		Exhibits Specialist	27.27
		Museum Guide	27.27
		Museum Researcher	63.64
		Museum Technician	9.09
		Heritage Planner	18.18
		Heritage Site Guide	9.09
		Heritage Tourism Operator	27.27
		Heritage Tradesperson/Heritage Conservation Technician	36.36
		Librarian	18.18
		Librarian Assistant	27.27
		Library Clerk	45.45
		Library Technician	54.55
		Archivist	45.45
		Bibliographer	36.36
		Cataloguer	18.18
		Genealogist	27.27
		Documentation Specialist	100.00
		Records Manager	100.00
		Recreation Facilities Attendant/Aide	0.00
		Facilitator	0.00
		Lecturer	0.00
Researcher	0.00		
Preventive Site Maintenance	100.00		
Park Sweeper	100.00		
Acoustic Design	100.00		
Photogrammetry	100.00		
Cross Sectoral	-	General Office Clerk	50.00
		Cash Clerk/Cashier	50.00
		Wages/Payroll Clerk	45.00
		Bookkeeping Clerk	40.00

Tourism Industry	Value Chain	Skills/Jobs	%
		Human Resource Assistant	55.00
		Purchasing Officer	60.00
		Secretary	35.00
		Welcome Assistant	15.00
		Customer Services Manager	20.00
		Customer Service Representative	15.00
		Communication Telephone Operator	15.00
		Company Driver	45.00
		Parking Attendant	5.00
		Parking Valet	10.00
		Elevator Technician	10.00
		Elevator Attendant	15.79
		Surveillance Officer (CCTV Operation)	20.00
		Security Guard	70.00
		Disaster Risk Management Officer	40.00
		Safety Officer (Maintenance and Engineering)	45.00
		Pollution Control Officer	35.00
		Interior Architect	20.00
		Interior Decorator	10.00
		Interior Designer	10.00
		Engineering Aide	40.00
		Maintenance Technician	55.00
		Plant Care Technician	15.00
		Public Area Supervisor	15.00
		Public Attendant/Public Area Cleaner	30.00
		Project Development Associate/Officer	20.00
		Project Development Manager	15.00
		Sales and Marketing Executive/Manager	25.00
		Sales and Marketing Assistant	25.00
		Sales and Marketing Personnel/Officer	10.00
		Advertising Manager	20.00
		Advertising Clerk	10.00
		Graphic Designer	35.00
		Social Media Manager	30.00
		Web Designer	30.00
		Video Specialist	15.00
		Videographer	25.00
		Photographer	25.00

Tourism Industry	Value Chain	Skills/Jobs	%
		Content Writer	20.00
		Brand Ambassador	5.00
		Handicraft Workers	0.00
		Cultural Dancer	5.00
		Translator	20.00
		Sign Language Interpreter	15.00
		First Aid Responder	35.00
		Basic Life Support	25.00
		Drowning Prevention	15.00
		Tourism Ethics	20.00

Among the list of requirements, the respondents were asked to project the skills supply of the jobs/skills for the next five years for those that are applicable to the industry. The respondents only answered the sections relevant to their industry and asked as well to identify the projection for the “cross sectoral” requirements. From the ILO and OECD report (2018) it was highlighted that “while all forecasts are forward-looking, the time span and frequency of forecasting varies. Exercises to anticipate future skills needs can anticipate short (generally 6 months), medium term (2-5 years) or longer term (5 years or more)”. As most forecasts cover medium term to provide a period for review and updating, TESDA follows the same reference period for its skills anticipation.

From the projected distribution of the skills supply in Table 45 it can be seen that for the next five years, 60% of the job requirements in the Accommodation Industry are projected to have no change for more than 60% of the tourism enterprises. All of the tourism enterprises identified as no change the following jobs under the Accommodation Industry: Roundsman, Dishwasher, Delivery Helper, Deliveryman/crew, Front Office Supervisor, Bell Boy/Luggage Porter, Laundry Attendant, Laundry Worker/Operator (Hand or Machine), Laundry Valet/Runner, Presser (Hand or Machine), Linen Attendant, Window Cleaner, Cloak Room Attendant, Head Gardener, Gardener, Landscaper, Florist, Butler, and House Detective (hotel).

Additionally, Muslim Friendly Food Production (Halal Muslim), Laundry Manager, Heritage Site Guide, Documentation Specialist, Records Manager, Preventive Site Maintenance, Park Sweeper, Acoustic Design, and Photogrammetry are projected to have the highest shortage at 100%. This is followed by Banquet Head Cook/Chef, Head Chef, Guest Relations Manager, and Underwater Diving Instructor at 75%. The result is consistent with the results of a Learning Needs Assessment (LNA) conducted in 2019 revealing that barrier-free tourism and understanding Muslim travelers are among the gaps identified for the sector (Department of Tourism, 2021a, 85-89).

In cases where there is a surplus of workers, it accounts for 8% to 40% of the all responding enterprises.

Furthermore, it shall be noted that the following are the required skills by the government agencies such as the Department of Environment and Natural Resources (DENR): (1)

Safety Officer (Maintenance/Engineering Department), (2) Pollution Control Officer, (3) Disaster Risk Management Officer.

Table 45.

Distribution of the Projected Skills Supply for the Next 5 years by Industry

Tourism Industry	Value Chain	Skills/Jobs	Changes (%)			
			Shortage	No change	Surplus	Total
Accommodation	Food Production	Executive Chef	60.00	20.00	20.00	100.00
		Banquet Head Cook/Chef	75.00	25.00	0.00	100.00
		Head Chef	75.00	25.00	0.00	100.00
		Head Cook	66.67	33.33	0.00	100.00
		Chef de Partie - Main Course Chef	66.67	33.33	0.00	100.00
		Chef de Partie - Entremetier	66.67	33.33	0.00	100.00
		Chef de Partie - Saucier	66.67	33.33	0.00	100.00
		Chef de Partie - Butcher Chef	66.67	33.33	0.00	100.00
		Commis Chef	33.33	66.67	0.00	100.00
		Commis Helper	33.33	66.67	0.00	100.00
		Demi Chef	50.00	50.00	0.00	100.00
		Sous-chef	33.33	66.67	0.00	100.00
		R&D Chef	50.00	50.00	0.00	100.00
		Kitchen Assistant/Kitchenhand/Kitchen Porter	33.33	66.67	0.00	100.00
		Kitchen Manager/Supervisor	50.00	50.00	0.00	100.00
		Pantry Attendant	50.00	50.00	0.00	100.00
		Roundsman	0.00	100.00	0.00	100.00
		Dishwasher	0.00	100.00	0.00	100.00
		Baker (general)	33.33	66.67	0.00	100.00
		Patissier and Confectioner	66.67	33.33	0.00	100.00
		Delivery Helper	0.00	100.00	0.00	100.00
		Deliveryman/crew	0.00	100.00	0.00	100.00
		Food Safety Officer	33.33	66.67	0.00	100.00
		Muslim Friendly Food Production (Halal Muslim)	100.00	0.00	0.00	100.00
	Food Handling and Sanitation	66.67	33.33	0.00	100.00	
	Front Office	Front Office Manager	33.33	66.67	0.00	100.00
		Guest Relations Manager	75.00	25.00	0.00	100.00
		Front Office Supervisor	0.00	100.00	0.00	100.00
		Guest Staff	0.00	75.00	25.00	100.00

		Hotel Attendants	33.33	66.67	0.00	100.00
		Hotel Front Desk Clerk	40.00	60.00	0.00	100.00
		Hotel Receptionist	16.67	83.33	0.00	100.00
		Reservation Clerk	25.00	75.00	0.00	100.00
		Bell Boy/Luggage Porter	0.00	100.00	0.00	100.00
		Concierge	33.33	66.67	0.00	100.00
	Housekeeping	Executive Housekeeper	62.50	37.50	0.00	100.00
		Assistant Executive Housekeeper	66.67	33.33	0.00	100.00
		Floor Supervisor	40.00	60.00	0.00	100.00
		Laundry Manager	100.00	0.00	0.00	100.00
		Laundry Supervisor	50.00	50.00	0.00	100.00
		Laundry Attendant	0.00	100.00	0.00	100.00
		Laundry Worker/Operator (Hand or Machine)	0.00	100.00	0.00	100.00
		Laundry Valet/Runner	0.00	100.00	0.00	100.00
		Presser (Hand or Machine)	0.00	100.00	0.00	100.00
		Linen Attendant	0.00	100.00	0.00	100.00
		Tailor and Seamstress	33.33	66.67	0.00	100.00
		Room Attendant	42.86	57.14	0.00	100.00
		Window Cleaner	0.00	100.00	0.00	100.00
		Cloakroom Attendant	0.00	100.00	0.00	100.00
	Others	Hotel Manager	50.00	50.00	0.00	100.00
		Hotel Supervisor	50.00	50.00	0.00	100.00
		Head Gardener	0.00	100.00	0.00	100.00
		Gardener	0.00	100.00	0.00	100.00
		Landscaper	0.00	100.00	0.00	100.00
		Florist	0.00	100.00	0.00	100.00
		Butler	0.00	100.00	0.00	100.00
House Detective (hotel)		0.00	100.00	0.00	100.00	
Pool Lifeguards		50.00	50.00	0.00	100.00	
Recreational (Sun and Beach)	-	Beach Resort Experience Manager/Beach Resort Manager	33.33	50.00	16.67	100.00
		Beach Recreation Associate	40.00	20.00	40.00	100.00
		Sea Patrol (Bantay Dagat)	45.45	45.45	9.09	99.99
		Surf Instructor	50.00	16.67	33.33	100.00
		Underwater Diving Instructor	75.00	0.00	25.00	100.00
		Sailing Coach	33.33	50.00	16.67	100.00
		Environmental Officer	36.36	54.55	9.09	100.00
		Safety Officer	55.56	33.33	11.11	100.00
		Boat Operator	60.00	20.00	20.00	100.00

		Beach Lifeguards	0.00	100.00	0.00	100.00
Tangible Cultural Heritage	-	Gallery Assistant	0.00	100.00	0.00	100.00
		Gallery Technician	0.00	100.00	0.00	100.00
		Art Gallery/Museum Curator	33.33	66.67	0.00	100.00
		Painting Restorer	0.00	80.00	20.00	100.00
		Picture Restorer	0.00	66.67	33.33	100.00
		Exhibits Specialist	0.00	66.67	33.33	100.00
		Museum Guide	0.00	66.67	33.33	100.00
		Museum Researcher	28.57	57.14	14.29	100.00
		Museum Technician	0.00	100.00	0.00	100.00
		Heritage Planner	50.00	50.00	0.00	100.00
		Heritage Site Guide	100.00	0.00	0.00	100.00
		Heritage Tourism Operator	33.33	66.67	0.00	100.00
		Heritage Tradesperson/Heritage Conservation Technician	25.00	75.00	0.00	100.00
		Librarian	0.00	100.00	0.00	100.00
		Librarian Assistant	0.00	100.00	0.00	100.00
		Library Clerk	20.00	60.00	20.00	100.00
		Library Technician	0.00	83.33	16.67	100.00
		Archivist	20.00	60.00	20.00	100.00
		Bibliographer	0.00	50.00	50.00	100.00
		Cataloguer	0.00	100.00	0.00	100.00
		Genealogist	66.67	33.33	0.00	100.00
		Documentation Specialist	100.00	0.00	0.00	100.00
		Records Manager	100.00	0.00	0.00	100.00
		Preventive Site Maintenance	100.00	0.00	0.00	100.00
Park Sweeper	100.00	0.00	0.00	100.00		
Acoustic Design	100.00	0.00	0.00	100.00		
Photogrammetry	100.00	0.00	0.00	100.00		
Cross Sectoral	-	General Office Clerk	0.00	80.00	20.00	100.00
		Cash Clerk/Cashier	10.00	90.00	0.00	100.00
		Wages/Payroll Clerk	0.00	100.00	0.00	100.00
		Bookkeeping Clerk	0.00	87.50	12.50	100.00
		Human Resource Assistant	18.18	81.82	0.00	100.00
		Purchasing Officer	8.33	83.33	8.33	99.99
		Secretary	0.00	100.00	0.00	100.00
		Welcome Assistant	0.00	75.00	25.00	100.00
		Customer Services Manager	40.00	40.00	20.00	100.00

	Customer Service Representative	50.00	50.00	0.00	100.00
	Communication Telephone Operator	0.00	75.00	25.00	100.00
	Company Driver	30.00	70.00	0.00	100.00
	Parking Attendant	0.00	100.00	0.00	100.00
	Parking Valet	0.00	100.00	0.00	100.00
	Elevator Technician	0.00	100.00	0.00	100.00
	Elevator Attendant	25.00	75.00	0.00	100.00
	Surveillance Officer (CCTV Operation)	0.00	100.00	0.00	100.00
	Security Guard	14.29	78.57	0.00	92.86
	Disaster Risk Management Officer	25.00	62.50	12.50	100.00
	Safety Officer (Maintenance and Engineering)	33.33	55.56	11.11	100.00
	Pollution Control Officer	42.86	42.86	14.29	100.01
	Interior Architect		80.00	20.00	100.00
	Interior Decorator	0.00	66.67	33.33	100.00
	Interior Designer	0.00	66.67	33.33	100.00
	Engineering Aide	11.11	77.78	11.11	100.00
	Maintenance Technician	45.45	45.45	9.09	99.99
	Plant Care Technician	25.00	50.00	25.00	100.00
	Public Area Supervisor	33.33	66.67	0.00	100.00
	Public Attendant/Public Area Cleaner	33.33	50.00	16.67	100.00
	Project Development Associate/Officer	20.00	60.00	20.00	100.00
	Project Development Manager	0.00	75.00	25.00	100.00
	Sales and Marketing Executive/Manager	40.00	60.00	0.00	100.00
	Sales and Marketing Assistant	16.67	66.67	16.67	100.01
	Sales and Marketing Personnel/Officer	0.00	100.00	0.00	100.00
	Advertising Manager	50.00	25.00	25.00	100.00
	Advertising Clerk	0.00	66.67	33.33	100.00
	Graphic Designer	42.86	57.14	0.00	100.00
	Social Media Manager	50.00	33.33	16.67	100.00
	Web Designer	28.57	57.14	14.29	100.00
	Video Specialist	0.00	75.00	25.00	100.00
	Videographer	16.67	66.67	16.67	100.01
	Photographer	16.67	66.67	16.67	100.01

		Content Writer	0.00	80.00	20.00	100.00
		Brand Ambassador	0.00	100.00	0.00	100.00
		Handicraft Workers	0.00	100.00	0.00	100.00
		Cultural Dancer	0.00	100.00	0.00	100.00
		Translator	20.00	60.00	20.00	100.00
		Sign Language Interpreter	25.00	50.00	25.00	100.00
		First Aid Responder	28.57	57.14	14.29	100.00
		Basic Life Support	40.00	40.00	20.00	100.00
		Drowning Prevention	25.00	75.00	0.00	100.00
		Tourism Ethics	0.00	100.00	0.00	100.00

Table 46 lists the projected hard-to-fill jobs/skills of the enterprises for the next five years. Among the list, the top requirements per tourism industry are as follows:

- Accommodation Industry
 - Kitchen Manager/Supervisor
 - Muslim-Friendly Food Production (Halal Muslim)
 - Guest Relations Manager
 - Laundry Manager

- Tangible Cultural Heritage
 - Heritage Planner
 - Heritage Tourism Operator
 - Librarian Assistant
 - Library Clerk
 - Library Technician
 - Bibliographer
 - Cataloguer
 - Genealogist
 - Acoustic Design
 - Photogrammetry

- Recreational (Sun and Beach)
 - Beach Resort Experience Manager/Beach Resort Manager
 - Beach Recreation Associate
 - Environmental Officer
 - Safety Officer
 - Boat Operator
 - Beach Lifeguards

- Cross Sectoral
 - Elevator Attendant
 - Project Development Associate/Officer
 - Project Development Manager

One of the observations is that all of the top hard-to-fill requirements for the Accommodation Industry (except for Muslim friendly food production) are all higher-level qualifications. This is similar to the clamor of the Tourism Industry Board Foundation Inc. (TIBFI) to develop

programs focusing on higher-level qualifications (NC III and NC IV) in view of the ASEAN Mutual Recognition Agreement for Tourism Professionals. The results of the study (considering the projected demand and the difficulty in filling up the position) may be considered in the identification of the programs to be developed. Moreover, all of the requirements under the Recreational (Sun and Beach) are considered hard-to-fill.

Linked with Table 45, those that are considered as hard-to-fill and projected to have a high shortage of workers are Muslim Friendly Food Production (Halal Muslim), Laundry Manager, Acoustic Design, Photogrammetry, and Guest Relations Manager.

On the other hand, there are four requirements that are considered as not hard-to-fill by all of the tourism enterprises; as such removed from the table below: Sea Patrol (Bantay Dagat), Surf Instructor, Underwater Diving Instructor, and Sailing Coach.

Table 46.
Percentage of the Tourism Enterprises based on the Nature (Hard-to-fill) of the Skills/Job by Industry

Tourism Industry	Value Chain	Skills/Jobs	%
Accommodation	Food Production	Executive Chef	80.00
		Banquet Head Cook/Chef	75.00
		Head Chef	75.00
		Head Cook	66.67
		Chef de Partie - Main Course Chef	66.67
		Chef de Partie - Entremetier	66.67
		Chef de Partie - Saucier	66.67
		Chef de Partie - Butcher Chef	66.67
		Commis Chef	66.67
		Commis Helper	33.33
		Demi Chef	50.00
		Sous-chef	33.33
		R&D Chef	50.00
		Kitchen Assistant/Kitchenhand/Kitchen Porter	33.33
		Kitchen Manager/Supervisor	100.00
		Pantry Attendant	50.00
		Roundsman	0.00
		Dishwasher	33.33
		Baker (general)	33.33
		Patissier and Confectioner	33.33
Delivery Helper	0.00		
Deliveryman/crew	0.00		
Food Safety Officer	66.67		
Muslim Friendly Food Production (Halal Muslim)	100.00		
Food Handling and Sanitation	66.67		

	Front Office	Front Office Manager	66.67
		Guest Relations Manager	100.00
		Front Office Supervisor	33.33
		Guest Staff	0.00
		Hotel Attendants	33.33
		Hotel Front Desk Clerk	40.00
		Hotel Receptionist	33.33
		Reservation Clerk	25.00
		Bell Boy/Luggage Porter	0.00
		Concierge	66.67
		Housekeeping	Executive Housekeeper
	Assistant Executive Housekeeper		66.67
	Floor Supervisor		40.00
	Laundry Manager		100.00
	Laundry Supervisor		50.00
	Laundry Attendant		25.00
	Laundry Worker/Operator (Hand or Machine)		0.00
	Laundry Valet/Runner		0.00
	Presser (Hand or Machine)		50.00
	Linen Attendant		33.33
	Tailor and Seamstress		66.67
	Room Attendant		28.57
	Window Cleaner		33.33
	Cloakroom Attendant		0.00
	Others	Hotel Manager	75.00
		Hotel Supervisor	25.00
		Head Gardener	50.00
		Gardener	0.00
		Landscaper	0.00
		Florist	33.33
		Butler	33.33
		House Detective (hotel)	33.33
		Pool Lifeguards	50.00
Tangible Cultural Heritage	-	Gallery Assistant	33.33
		Gallery Technician	40.00
		Art Gallery/Museum Curator	72.73
		Painting Restorer	83.33
		Picture Restorer	75.00
		Exhibits Specialist	33.33
		Museum Guide	54.55
		Museum Researcher	55.56
		Museum Technician	80.00
	Heritage Planner	100.00	

		Heritage Site Guide	25.00
		Heritage Tourism Operator	100.00
		Heritage Tradesperson/Heritage Conservation Technician	66.67
		Librarian	60.00
		Librarian Assistant	100.00
		Library Clerk	100.00
		Library Technician	100.00
		Archivist	71.43
		Bibliographer	100.00
		Cataloguer	100.00
		Genealogist	100.00
		Documentation Specialist	100.00
		Records Manager	0.00
		Recreation Facilities Attendant/Aide	0.00
		Facilitator	33.33
		Lecturer	40.00
		Researcher	66.67
		Preventive Site Maintenance	40.00
		Park Sweeper	0.00
		Acoustic Design	100.00
		Photogrammetry	100.00
Recreational (Sun and Beach)	-	Beach Resort Experience Manager/Beach Resort Manager	100.00
		Beach Recreation Associate	100.00
		Environmental Officer	100.00
		Safety Officer	100.00
		Boat Operator	100.00
		Beach Lifeguards	100.00
Cross Sectoral	-	General Office Clerk	20.00
		Cash Clerk/Cashier	30.00
		Wages/Payroll Clerk	22.22
		Bookkeeping Clerk	12.50
		Human Resource Assistant	36.36
		Purchasing Officer	16.67
		Secretary	28.57
		Welcome Assistant	25.00
		Customer Services Manager	40.00
		Customer Service Representative	50.00
		Communication Telephone Operator	0.00
		Company Driver	40.00
		Parking Attendant	0.00
		Parking Valet	0.00
		Elevator Technician	66.67

	Elevator Attendant	75.00
	Surveillance Officer (CCTV Operation)	25.00
	Security Guard	14.29
	Disaster Risk Management Officer	50.00
	Safety Officer (Maintenance and Engineering)	66.67
	Pollution Control Officer	71.43
	Interior Achitect	40.00
	Interior Decorator	33.33
	Interior Designer	33.33
	Engineering Aide	33.33
	Maintenance Technician	45.45
	Plant Care Technician	0.00
	Public Area Supervisor	33.33
	Public Attendant/Public Area Cleaner	16.67
	Project Development Associate/Officer	80.00
	Project Development Manager	75.00
	Sales and Marketing Executive/Manager	60.00
	Sales and Marketing Assistant	50.00
	Sales and Marketing Personnel/Officer	0.00
	Advertising Manager	50.00
	Advertising Clerk	0.00
	Graphic Designer	42.86
	Social Media Manager	50.00
	Web Designer	42.86
	Video Specialist	25.00
	Videographer	50.00
	Photographer	50.00
	Content Writer	60.00
	Brand Ambassador	50.00
	Handicraft Workers	0.00
	Cultural Dancer	0.00
	Translator	40.00
	Sign Language Interpreter	25.00
	First Aid Responder	71.43
	Basic Life Support	60.00
	Drowning Prevention	25.00
	Tourism Ethics	50.00

Among the list of requirements, there are four job requirements that are considered as not applicable by all of the tourism enterprises; as such removed from table below (Table 47) since enterprises do not need to identify its highest educational qualification: Recreation Facilities Attendant/Aide, Facilitator, Lecturer, and Researcher.

Analyzing the distribution of the supply of applicable projected skills for the next five years according to the required highest educational attainment by industry (Table 47), it can be seen that the tourism industry favors higher education, with many seemingly entry-level positions requiring college degrees across the entire industry's value chains. However, basic education is still given continued importance as it serves as a minimum entry point for most positions, and TVET, in particular, plays a crucial role in specific areas like food production, housekeeping, and certain recreational jobs, demonstrating its importance in developing practical skills. However, its importance seems less pronounced in management, administrative, and specialized professional roles.

A closer look at specific industries within tourism reveals distinct educational patterns. In the accommodation industry, food production relies heavily on TVET, particularly for the different types of Chef de Partie, bakers, and food processing personnel. This can be possibly attributed to the available TVET programs that produce these jobs, such as Cookery NC II, Bread and Pastry Production NC II, food production programs up to NC level IV, and food processing programs also up to NC level IV. However, management roles, like Banquet Head Cook/Chef, still require higher education (75%). With this, it should be noted that according to its training regulations, graduates of the TVET program Food Production (Professional Cookery NC III) can become banquet head cooks or chefs.

The value chains in housekeeping and other services also present a wider educational spectrum. Management roles in the front office and housekeeping (i.e. hotel manager, laundry manager, and front office managers all at 100%), and specialized roles like florists and butlers (both at 66.67%) increasingly favor higher education, while other roles remain accessible through TVET, since, again, there are available TVET programs for these roles, for example, Landscape Installation and Maintenance (Softscape) NC II for landscapers, and Housekeeping NC II for laundry workers/operators (hand or machine) and laundry valet/runner (both of which had 100% response for TVET).

Meanwhile, the recreation industry leans toward higher education since it is not just the managerial roles that require a college degree and above, but also officers (i.e. safety officer at 88.89% and environmental officer at 81.82%) and specialized roles such as surf instructors (66.67%) and boat operators (70%). With the availability of TVET programs in Lifeguard Services NC II and NC III, it is interesting to note that 100% of the respondents require higher education for beach lifeguards. With these findings, a potential mismatch between academic qualifications and industry needs raises concerns about the availability of practically skilled workers, emphasizing the importance of balancing TVET and higher education to enhance career mobility and industry readiness.

For the tangible cultural heritage industry, jobs like gallery technician, art gallery/museum curator, painting restorer, picture restorer, museum technician, heritage site guide, library clerk, library guide, documentation specialist, and records manager most likely require a combination of historical knowledge, tourism expertise, highly-specialized skills, and potentially some management skills since 100% of the respondents require their employees to be higher education graduates. Based on the previous sections, these jobs are also hard to fill due to the nature of their roles. In the same industry, skills in acoustic design and photogrammetry only require TVET certification.

Further supporting the inclination of the industry toward higher education, the cross sectoral data also shows a preference for the same since most of the listed roles have 100% or significant percentages requiring higher educational attainment, such as Sales and Marketing Executive/Manager, Advertising Manager, Graphic Designer, Social Media Manager, Web Designer, Video Specialist, Photographer, and Translator. Meanwhile, Security Guard (42.86%), Maintenance Technician (72.73%), Public Area Supervisor (66.67%), Videographer (50%), Cultural Dancer (50%), and First Aid Responder (71.42%) all lean toward TVET graduates, with some equal with higher or basic education. Parking Attendant, Parking Valet, Elevator Technician, Handicraft Workers, Basic Life Support, and Drowning Prevention all had 100% in the requirement for TVET graduates. The rest of the roles, which is majority of the list, show 0% or very low percentages for TVET qualifications. This suggests that while practical skills are undoubtedly important, formal technical training may not be the primary pathway into these professions. Instead, a traditional academic route culminating in a higher education degree seems to be the dominant model.

Table 47.
Distribution of the Projected Skills Supply for the Next 5 years by Highest Educational Qualification Needed, by Industry

Tourism Industry	Value Chain	Skills/Jobs	Highest Educational Qualification Needed (%)			
			Basic Education Graduate (HS Grad Old Curriculum or SHS Graduate K-12 Curriculum)	Technical Vocational Education (TVET) Graduate	Higher Education Graduate (College Degree and above)	Total
Accommodation	Food Production	Executive Chef	0.00	0.00	100.00	100.00
		Banquet Head Cook/Chef	0.00	25.00	75.00	100.00
		Head Chef	0.00	50.00	50.00	100.00
		Head Cook	33.33	33.33	33.33	100.00
		Chef de Partie - Main Course Chef	0.00	66.67	33.33	100.00
		Chef de Partie - Entremetier	0.00	66.67	33.33	100.00
		Chef de Partie - Saucier	0.00	66.67	33.33	100.00
		Chef de Partie - Butcher Chef	0.00	66.67	33.33	100.00
		Commis Chef	0.00	66.67	33.33	100.00
		Commis Helper	0.00	100.00	0.00	100.00
		Demi Chef	0.00	50.00	50.00	100.00
		Sous-chef	0.00	66.67	33.33	100.00
		R&D Chef	0.00	0.00	100.00	100.00

		Kitchen Assistant/Kitchenhand/ Kitchen Porter	33.33	66.67	0.00	100.00
		Kitchen Manager/Supervisor	0.00	0.00	100.00	100.00
		Pantry Attendant	0.00	100.00	0.00	100.00
		Roundsman	0.00	100.00	0.00	100.00
		Dishwasher	100.00	0.00	0.00	100.00
		Baker (general)	0.00	100.00	0.00	100.00
		Patissier and Confectioner	0.00	66.67	33.33	100.00
		Delivery Helper	50.00	50.00	0.00	100.00
		Deliveryman/crew	50.00	50.00	0.00	100.00
		Food Safety Officer	0.00	0.00	100.00	100.00
		Muslim Friendly Food Production (Halal Muslim)	0.00	0.00	100.00	100.00
		Food Handling and Sanitation	0.00	0.00	100.00	100.00
	Front Office	Front Office Manager	0.00	0.00	100.00	100.00
		Guest Relations Manager	0.00	0.00	100.00	100.00
		Front Office Supervisor	16.67	0.00	83.33	100.00
		Guest Staff	25.00	0.00	75.00	100.00
		Hotel Attendants	0.00	33.33	66.67	100.00
		Hotel Front Desk Clerk	20.00	0.00	80.00	100.00
		Hotel Receptionist	16.67	0.00	83.33	100.00
		Reservation Clerk	0.00	0.00	100.00	100.00
		Bell Boy/Luggage Porter	25.00	50.00	25.00	100.00
		Concierge	0.00	0.00	100.00	100.00
	Housekeeping	Executive Housekeeper	12.50	12.50	75.00	100.00
		Assistant Executive Housekeeper	0.00	0.00	100.00	100.00
		Floor Supervisor	40.00	0.00	60.00	100.00
		Laundry Manager	0.00	0.00	100.00	100.00
		Laundry Supervisor	0.00	0.00	100.00	100.00
		Laundry Attendant	50.00	50.00	0.00	100.00
		Laundry Worker/Operator (Hand or Machine)	0.00	100.00	0.00	100.00
		Laundry Valet/Runner	0.00	100.00	0.00	100.00
		Presser (Hand or Machine)	50.00	50.00	0.00	100.00
		Linen Attendant	33.33	66.67	0.00	100.00

		Tailor and Seamstress	33.33	66.67	0.00	100.00
		Room Attendant	28.57	57.14	14.29	100.00
		Window Cleaner	100.00	0.00	0.00	100.00
		Cloakroom Attendant	100.00	0.00	0.00	100.00
	Others	Hotel Manager	0.00	0.00	100.00	100.00
		Hotel Supervisor	25.00	0.00	75.00	100.00
		Head Gardener	0.00	100.00	0.00	100.00
		Gardener	66.67	33.33	0.00	100.00
		Landscaper	33.33	66.67	0.00	100.00
		Florist	33.33	0.00	66.67	100.00
		Butler	0.00	33.33	66.67	100.00
		House Detective (hotel)	0.00	0.00	100.00	100.00
		Pool Lifeguards	25.00	75.00	0.00	100.00
Recreational (Sun and Beach)	-	Beach Resort Experience Manager/Beach Resort Manager	0.00	33.33	66.67	100.00
		Beach Recreation Associate	0.00	40.00	60.00	100.00
		Sea Patrol (Bantay Dagat)	0.00	0.00	100.00	100.00
		Surf Instructor	0.00	33.33	66.67	100.00
		Underwater Diving Instructor	0.00	50.00	50.00	100.00
		Sailing Coach	0.00	33.33	66.67	100.00
		Environmental Officer	0.00	18.18	81.82	100.00
		Safety Officer	0.00	11.11	88.89	100.00
		Boat Operator	10.00	20.00	70.00	100.00
		Beach Lifeguards	0.00	0.00	100.00	100.00
	Tangible Cultural Heritage	-	Gallery Assistant	25.00	25.00	50.00
		Gallery Technician	0.00	0.00	100.00	100.00
		Art Gallery/Museum Curator	0.00	0.00	100.00	100.00
		Painting Restorer	0.00	0.00	100.00	100.00
		Picture Restorer	0.00	0.00	100.00	100.00
		Exhibits Specialist	0.00	33.33	66.67	100.00
		Museum Guide	0.00	33.33	66.67	100.00
		Museum Researcher	0.00	14.29	85.71	100.00
		Museum Technician	0.00	0.00	100.00	100.00
		Heritage Planner	0.00	50.00	50.00	100.00
		Heritage Site Guide	0.00	0.00	100.00	100.00
		Heritage Tourism Operator	0.00	33.33	66.67	100.00
		Heritage Tradesperson/Heritage	0.00	25.00	75.00	100.00

		Conservation Technician				
		Librarian	0.00	50.00	50.00	100.00
		Librarian Assistant	33.33	0.00	66.67	100.00
		Library Clerk	0.00	0.00	100.00	100.00
		Library Technician	0.00	0.00	100.00	100.00
		Archivist	40.00	20.00	40.00	100.00
		Bibliographer	75.00	25.00	0.00	100.00
		Cataloguer	0.00	50.00	50.00	100.00
		Genealogist	0.00	66.67	33.33	100.00
		Documentation Specialist	0.00	0.00	100.00	100.00
		Records Manager	0.00	0.00	100.00	100.00
		Preventive Site Maintenance	0.00	0.00	100.00	100.00
		Park Sweeper	0.00	0.00	100.00	100.00
		Acoustic Design	0.00	100.00	0.00	100.00
		Photogrammetry	0.00	100.00	0.00	100.00
Cross Sectoral	-	General Office Clerk	10.00	10.00	80.00	100.00
		Cash Clerk/Cashier	0.00	10.00	90.00	100.00
		Wages/Payroll Clerk	0.00	0.00	100.00	100.00
		Bookkeeping Clerk	0.00	0.00	100.00	100.00
		Human Resource Assistant	0.00	0.00	100.00	100.00
		Purchasing Officer	0.00	0.00	100.00	100.00
		Secretary	0.00	0.00	100.00	100.00
		Welcome Assistant	0.00	0.00	100.00	100.00
		Customer Services Manager	0.00	0.00	100.00	100.00
		Customer Service Representative	0.00	0.00	100.00	100.00
		Communication Telephone Operator	0.00	0.00	100.00	100.00
		Company Driver	50.00	40.00	10.00	100.00
		Parking Attendant	0.00	100.00	0.00	100.00
		Parking Valet	0.00	100.00	0.00	100.00
		Elevator Technician	0.00	100.00	0.00	100.00
		Elevator Attendant	66.67	33.33	0.00	100.00
		Surveillance Officer (CCTV Operation)	50.00	25.00	25.00	100.00
		Security Guard	42.86	42.86	14.28	100.00
		Disaster Risk Management Officer	0.00	50.00	50.00	100.00

		Safety Officer (Maintenance and Engineering)	0.00	44.44	55.56	100.00
		Pollution Control Officer	0.00	14.29	85.71	100.00
		Interior Architect	0.00	0.00	100.00	100.00
		Interior Decorator	0.00	0.00	100.00	100.00
		Interior Designer	0.00	0.00	100.00	100.00
		Engineering Aide	22.22	22.22	55.56	100.00
		Maintenance Technician	0.00	72.73	27.27	100.00
		Plant Care Technician	0.00	100.00	0.00	100.00
		Public Area Supervisor	0.00	66.67	33.33	100.00
		Public Attendant/Public Area Cleaner	50.00	33.33	16.67	100.00
		Project Development Associate/Officer	0.00	20.00	80.00	100.00
		Project Development Manager	0.00	0.00	100.00	100.00
		Sales and Marketing Executive/Manager	0.00	0.00	100.00	100.00
		Sales and Marketing Assistant	0.00	0.00	100.00	100.00
		Sales and Marketing Personnel/Officer	0.00	0.00	100.00	100.00
		Advertising Manager	0.00	0.00	100.00	100.00
		Advertising Clerk	0.00	0.00	100.00	100.00
		Graphic Designer	0.00	28.57	71.43	100.00
		Social Media Manager	0.00	0.00	100.00	100.00
		Web Designer	0.00	14.29	85.71	100.00
		Video Specialist	0.00	0.00	100.00	100.00
		Videographer	0.00	50.00	50.00	100.00
		Photographer	0.00	33.33	66.67	100.00
		Content Writer	0.00	20.00	80.00	100.00
		Brand Ambassador	0.00	0.00	100.00	100.00
		Handicraft Workers	0.00	100.00	0.00	100.00
		Cultural Dancer	0.00	50.00	50.00	100.00
		Translator	0.00	20.00	80.00	100.00
		Sign Language Interpreter	0.00	25.00	75.00	100.00
		First Aid Responder	14.29	71.42	14.29	100.00
		Basic Life Support	0.00	100.00	0.00	100.00
		Drowning Prevention	0.00	100.00	0.00	100.00
		Tourism Ethics	0.00	0.00	100.00	100.00

In terms of tourism enterprises requiring technical vocational certificate or national certification for the given skills/jobs, data shows that they do require this type of certification for most job roles, highlighting the crucial role of TVET in the industry. While data from the previous table revealed an inclination toward higher education as the highest educational level needed for the job, Table 48 still shows that TVET serves as a primary pathway for these roles. This means that the highest educational attainment and certification requirements complement each other.

The accommodation, recreational, and cross-sectoral industries show a very high percentage of jobs requiring certification. This highlights the importance of standardized skills and training in these customer-facing and operationally critical areas, water safety, environmental protection, and guest experience management in a recreational setting, and other tourism-related businesses across all departments. In particular, roles in the accommodation industry show high demand for certification since a significant portion of enterprises (often 66.67% to 100%) requires the certification for roles like Chefs (Executive Chef, Chef de Partie, etc.), Bakers, and even some Housekeeping positions (Laundry Manager, Floor Supervisor). The additional jobs identified by the respondents in the accommodation industry, such as Bartender/Barkeeper, Waiter (Busser and Server), F&B Service Attendant (Host/Hostess), reflect consistency in that the highest educational qualification needed for them is TVET graduate and that they require technical vocational/national certification. It should be noted, however, that these three jobs are not hard to fill, suggesting that the supply of individuals with the necessary TVET qualifications for these common hospitality roles is relatively adequate, or that on-the-job training may be a viable alternative to formal certification in these specific areas.

The recreational (sun and beach) industry stands out for its strong emphasis on technical vocational training, with all roles—except for Boat Operator, though still significant at 66.67%—receiving 100% affirmative responses from enterprises requiring a technical vocational certificate or national certification. This trend likely reflects the industry's need for specialized, safety-critical skills, as many roles involve direct interaction with tourists in potentially hazardous environments, such as water-based activities or adventure sports. Certifications ensure that workers meet standardized competency levels, enhancing both service quality and safety standards, which are crucial in maintaining the industry's reputation and regulatory compliance.

Results from the tangible cultural heritage industry shows some similarities with the other sectors in that majority of the jobs require certification, but as recalled from the analysis from the previous table, most of the respondents deem higher education necessary for almost all of the jobs in that industry. Be that as it may, both analyses still highlight the significance of TVET in the industry.

More specifically, based on Table 48, the following are the job/skill requirements that do not require a Technical Vocational Certificate/National Certificate to do the job and thus may not be prioritized for TVET program development:

- Accommodation
 - Dishwasher
 - Delivery Helper
 - Cloakroom Attendant

- Gardener
- Landscaper
- Tangible Cultural Heritage
 - Museum Researcher
 - Librarian
 - Librarian Assistant
- Cross Sectoral
 - Communication Telephone Operator
 - Parking Attendant
 - Parking Vallet
 - Elevator Attendant
 - Interior Achitect

This suggests that while these roles might benefit from practical skills, employers prioritize other qualifications, likely higher education degrees, as discussed in the previous analysis. For instance, 0% of the responding enterprises require TVET for Hotel Managers. The rest of the roles in the list received at least 22.22% responses, giving a possible implication that for the majority of tourism-related jobs, some level of technical or vocational training, even if not the primary qualification, is still considered valuable or even necessary by a substantial portion of employers.

Another thing that should be noted is that most of these skills/jobs are needed nationwide (Annex B), which is understandable since tourism is a significant economic driver across the entire country. There are, however, a handful of jobs that are required only in specific areas, like Sea Patrol (Bantay Dagat) and Heritage Site Guide, given the local geographic and cultural context in certain parts of the country.

Table 48.

Percentage of Tourism Enterprises based on the Technical Vocational Certificate/National Certificate Requirement, by Industry

Tourism Industry	Value Chain	Skills/Jobs	%
Accommodation	Food Production	Executive Chef	100.00
		Banquet Head Cook/Chef	100.00
		Head Chef	66.67
		Head Cook	33.33
		Chef de Partie - Main Course Chef	66.67
		Chef de Partie - Entremetier	66.67
		Chef de Partie - Saucier	66.67
		Chef de Partie - Butcher Chef	66.67
		Commis Chef	66.67
		Commis Helper	66.67
		Demi Chef	50.00
		Sous-chef	66.67
		R&D Chef	100.00
		Kitchen Assistant/Kitchenhand/Kitchen Porter	66.67

		Kitchen Manager/Supervisor	100.00
		Pantry Attendant	50.00
		Roundsmen	50.00
		Dishwasher	0.00
		Baker (general)	66.67
		Patissier and Confectioner	66.67
		Delivery Helper	0.00
		Deliveryman/crew	50.00
		Food Safety Officer	100.00
		Muslim Friendly Food Production (Halal Muslim)	100.00
		Food Handling and Sanitation	100.00
	Front Office	Front Office Manager	100.00
		Guest Relations Manager	100.00
		Front Office Supervisor	33.33
		Guest Staff	50.00
		Hotel Attendants	50.00
		Hotel Front Desk Clerk	50.00
		Hotel Receptionist	33.33
		Reservation Clerk	100.00
		Bell Boy/Luggage Porter	25.00
		Concierge	100.00
	Housekeeping	Executive Housekeeper	50.00
		Assistant Executive Housekeeper	100.00
		Floor Supervisor	66.67
		Laundry Manager	100.00
		Laundry Supervisor	100.00
		Laundry Attendant	25.00
		Laundry Worker/Operator (Hand or Machine)	50.00
		Laundry Valet/Runner	50.00
		Presser (Hand or Machine)	50.00
		Linen Attendant	33.33
		Tailor and Seamstress	33.33
		Room Attendant	50.00
		Window Cleaner	33.33
	Cloakroom Attendant	0.00	
	Others	Hotel Manager	50.00
Hotel Supervisor		50.00	
Head Gardener		50.00	
Gardener		0.00	
Landscaper		0.00	
Florist		50.00	
Butler		50.00	

		House Detective (hotel)	100.00
		Pool Lifeguards	100.00
Recreational (Sun and Beach)	-	Beach Resort Experience Manager/Beach Resort Manager	100.00
		Beach Recreation Associate	100.00
		Sea Patrol (Bantay Dagat)	100.00
		Surf Instructor	100.00
		Underwater Diving Instructor	100.00
		Sailing Coach	100.00
		Environmental Officer	100.00
		Safety Officer	100.00
		Boat Operator	66.67
		Beach Lifeguards	100.00
Tangible Cultural Heritage	-	Gallery Assistant	100.00
		Gallery Technician	100.00
		Art Gallery/Museum Curator	100.00
		Painting Restorer	100.00
		Picture Restorer	100.00
		Exhibits Specialist	100.00
		Museum Guide	100.00
		Museum Researcher	0.00
		Museum Technician	66.67
		Heritage Planner	100.00
		Heritage Site Guide	100.00
		Heritage Tourism Operator	100.00
		Heritage Tradesperson/Heritage Conservation Technician	100.00
		Librarian	0.00
		Librarian Assistant	0.00
		Library Clerk	100.00
		Library Technician	100.00
		Archivist	33.33
		Bibliographer	25.00
		Cataloguer	100.00
		Genealogist	100.00
		Documentation Specialist	100.00
		Records Manager	100.00
		Recreation Facilities Attendant/Aide	0.00
		Facilitator	0.00
		Lecturer	0.00
		Researcher	0.00
Preventive Site Maintenance	33.33		
Park Sweeper	25.00		
Acoustic Design	100.00		

		Photogrammetry	100.00
Cross Sectoral	-	General Office Clerk	66.67
		Cash Clerk/Cashier	100.00
		Wages/Payroll Clerk	100.00
		Bookkeeping Clerk	100.00
		Human Resource Assistant	100.00
		Purchasing Officer	100.00
		Secretary	100.00
		Welcome Assistant	100.00
		Customer Services Manager	100.00
		Customer Service Representative	100.00
		Communication Telephone Operator	0.00
		Company Driver	22.22
		Parking Attendant	0.00
		Parking Valet	0.00
		Elevator Technician	33.33
		Elevator Attendant	0.00
		Surveillance Officer (CCTV Operation)	66.67
		Security Guard	58.33
		Disaster Risk Management Officer	80.00
		Safety Officer (Maintenance and Engineering)	80.00
		Pollution Control Officer	100.00
		Interior Architect	0.00
		Interior Decorator	100.00
		Interior Designer	100.00
		Engineering Aide	40.00
		Maintenance Technician	75.00
		Plant Care Technician	75.00
		Public Area Supervisor	50.00
		Public Attendant/Public Area Cleaner	40.00
		Project Development Associate/Officer	100.00
		Project Development Manager	100.00
		Sales and Marketing Executive/Manager	100.00
		Sales and Marketing Assistant	50.00
		Sales and Marketing Personnel/Officer	100.00
Advertising Manager	100.00		
Advertising Clerk	100.00		
Graphic Designer	100.00		
Social Media Manager	100.00		

		Web Designer	100.00
		Video Specialist	100.00
		Videographer	50.00
		Photographer	66.67
		Content Writer	50.00
		Brand Ambassador	100.00
		Handicraft Workers	100.00
		Cultural Dancer	50.00
		Translator	100.00
		Sign Language Interpreter	100.00
		First Aid Responder	83.33
		Basic Life Support	80.00
		Drowning Prevention	75.00
		Tourism Ethics	100.00

Table 49 looks into the frequency of promoted employees to managerial and supervisory positions specifically from the year 2021 to 2022. Examining this by industry, it can be seen that most of the enterprises in all of the industries have not promoted their employees during the given period. However, next to these large percentages, 33.33% of hotel accommodation enterprises promoted less than 10% of their employees while 16.67% of these enterprises promoted more than 50%. The 33.33% of Mabuhay accommodation also promoted less than 10% during the given period while the sole enterprise under recreational activities did not facilitate promotions. A small percentage, specifically 18.18% of the tangible cultural services granted such promotions to less than 10% of their employees.

A recreational activities enterprise revealed that although their employees are eligible for promotion, the employees themselves refuse due to the added responsibilities it may entail. Their employees also lack confidence or self esteem, thinking that their educational background is not enough to be in such positions.

For other industries, the problem is with the job itself, specifically the requirements it demands from the employees. An example of this is from the tangible cultural enterprise interviewed, which stated that one of the reasons why promotion is difficult to offer is because their positions are considered as government jobs (the enterprise is a under the management of the national museum), and when it comes to such jobs, a civil service exam is required which sometimes, even though the employee is qualified, he/she does not possess a civil service license.

Table 49

Distribution of the Employees Promoted to Managerial and Supervisory Positions by Industry

Tourism Industry	Tourism Enterprises (%)				Total
	None	< 10	10-50	> 50	
Accommodation					
• Hotel	50.00	33.33	0.00	16.67	100.00
• Mabuhay	66.67	33.33	0.00	0.00	100.00

Accommodation					
Recreational Activities (Sun and Beach)	100.00	0.00	0.00	0.00	100.00
Tangible Cultural Services (Museum)	81.82	18.18	0.00	0.00	100.00

Career or structured succession planning policy or practice as defined in this study, refers to a talent management planning policy or practice in which a pool of trained workers were built with the goal of preparing them for future promotion to key roles especially if leaders and other key employees step down or if the position becomes vacant. The table below (Table 50) investigates how much of the participating tourism enterprises' employees were subjected to such policies or practices per industry.

Hotel accommodations, more specifically 33.33% of enterprises provide career or structured succession planning policies or practices to 10 to 50% of their employees, another 33.33% provide it to more than 50%. Responses of Mabuhay accommodation enterprises were divided into those who do not facilitate such policies and practices (33.33%), those who provide it to less than 10% of their employees (33.33%), and those who offer it to 10 to 50% of their workforce (33.33%).

The enterprise under recreational activities responded that less than 10% of their employees are supported by such practices or policies, most of the tangible cultural services (45.45%) also responded the same while the remaining respondents (27.27%) indicated that 10 to 50% are supported, the other 27.27% however answered with 'None.'

Most of the enterprises under each enterprise except for hotel accommodation as observed are providing career/structured succession planning policy/services to less than 10% of their employees.

Table 50.
Distribution of Employees Supported by Career/Structured Succession Planning Policy/Practices for Current and Future Development by Industry

Tourism Industry	Tourism Enterprises (%)				Total
	None	< 10	10-50	> 50	
Accommodation					
• Hotel	16.67	16.67	33.33	33.33	100.00
• Mabuhay Accommodation	33.33	33.33	33.33	0.00	100.00
Recreational Activities (Sun and Beach)	0.00	100.00	0.00	0.00	100.00
Tangible Cultural Services (Museum)	27.27	45.45	27.27	0.00	100.00

Table 51 captures how much of the observed tourism enterprises' employees contribute outstanding performance to their respective tourism industries. Most of the hotel accommodation enterprises (66.67%) stated that 10 to 50% of their employees are performing in an outstanding manner while the other 33.33% claimed that more than 50% are on such level of performance. Responses from Mabuhay accommodation enterprises were divided (33.33%) to less than 10%, 10 to 50%, and more than 50% of employees that are performing excellently while the enterprise under recreational activities industry responded that less than 10% of their employees are doing their work in such a manner. For tangible cultural services, most of the respondents (36.36%) also stated the same percentage of employees (less than 10%) but the industry also obtained a very small percentage (9.09%) of those that do not have employees working outstandingly.

Similar to the previous table, most of the tourism enterprises under each industry responded that less than 10% of their employees contribute favorably in terms of performance except again for hotel accommodation which was higher at 10-50%.

Table 51.
Distribution of Employees Contributing Outstanding Performance to the Tourism Enterprises by Industry

Tourism Industry	Tourism Enterprises (%)				Total
	None	< 10	10-50	> 50	
Accommodation					
• Hotel	0.00	0.00	66.67	33.33	100.00
• Mabuhay Accommodation	0.00	33.33	33.33	33.33	100.00
Recreational Activities (Sun and Beach)	0.00	100.00	0.00	0.00	100.00
Tangible Cultural Services (Museum)	9.09	36.36	27.27	27.27	100.00

Table 52 focuses on the management of high potential employees working on the observed tourism enterprises specifically if a structured program is in place for them. High potential employees as defined are those employees who can perform high or more demanding tasks and/or work in multi-skilled positions, and as seen below, 83.33% of enterprises under the hotel industry develop such a program (the highest among other industries). The 33.33% of enterprises from mabuhay accommodation industry also have this while the same program is being provided by the enterprise observed under recreational activities. For tangible cultural services, 36.36% of enterprises also manage high potential employees through such a program.

Table 52.
Percentage of Tourism Enterprises with Structured Program for Managing High Potential Employees by Industry

Tourism Industry	%
Accommodation	
• Hotel	83.33
• Mabuhay Accommodation	33.33

Recreational Activities (Sun and Beach)	100.00
Tangible Cultural Services (Museum)	36.36

4.3 Skills in the Business

The table below (Table 53) looks through the performance of full-time regular and full-time non-regular employees working under the tourism industries covered. Those employees who are unable to perform the job given to them is at the lowest at 2.86%.

Employees that can perform their job but not beyond the given description or task are considered the highest among the performance evaluations given (55.87%). Such performance—doing just what is required and not doing anything beyond or above the given task is now known as quiet quitting. And according to a study conducted by Milieu Insight, 60% of employees in the Philippines have engaged in quiet quitting mainly because of low salary and the lack of opportunities to improve in the company (Desiderio, 2023). And while such employees also recognize that just doing the bare minimum would make others see them as lazy or slacking, disinterested and being seen as unreliable, they prioritize the benefits more: having less stress, better mental health and work-life balance (Daxim, 2022).

The percentage of those employees who have the potential to perform with more demanding duties than they currently have, on the other hand, is also quite high at 41.27%.

Table 53.
Distribution of the Employees by Performance Evaluation

Performance Evaluation	%
Able to perform the job but not beyond	55.87
Unable to perform the job	2.86
Have the potential to perform with more demanding duties than they currently have	41.27
Total	100.00

In continuation to the table above, Table 54 looks into the same performance evaluations of employees but this time in terms of the tourism industry they belong to. Looking at the responses of the hotel accommodation enterprises, it can be seen that most of their employees are able to perform the job but not beyond (66.11%), 32.22% exceed the job given to them while 1.67% were unable to perform the given work. Almost the same distributions can be observed from the responses of Mabuhay accommodation enterprises, 60% are able to perform the job but not beyond, 33.33% have the potential to perform more than what is expected from them while the lowest distribution of 6.67% employees are unable to perform the job.

For the recreational activities sector which as mentioned earlier, only involves one enterprise, most (60%) of their employees are considered as those who are able to perform the given work but not beyond, however half of these distribution (30%) are

employees who are unable to perform the job. The lowest distribution (10%) are those that have the potential to perform more than what is asked.

Distribution of the tangible cultural services' employees are quite different from the rest of the industries, most of their employees (51.21%) as seen below were considered to have potential when it comes to performing more demanding duties while the rest of the distribution (48.79%) are those that are able to perform the job but not beyond what is asked. There seems to be no distribution for non-performing employees.

Table 54.
Distribution of the Employees by Industry and Performance Evaluation

Tourism Industry	Performance Evaluation (%)			Total
	Able to perform the job but not beyond	Unable to perform the job	Have the potential to perform with more demanding duties than they currently have	
Accommodation				
• Hotel	66.11	1.67	32.22	100.00
• Mabuhay Accommodation	60.00	6.67	33.33	100.00
Recreational Activities (Sun and Beach)	60.00	30.00	10.00	100.00
Tangible Cultural Services (Museum)	48.79	0.00	51.21	100.00

After distributing the enterprises' employees in terms of performance evaluation as seen from the table above, the next table (Table 55) will now look into the reasons why performance of those employees unable to perform their job are poor. Out of the ten presented possible reasons, six reasons were identified by the enterprises along with examples also provided by them. The reason with the highest number of responses was due to lack of specialized technical skills for the tourism sector with a percentage of 100, the examples given by the enterprises were lack of technical skills in accommodation, tour guiding, housekeeping, and knife skills.

The second highest number of responses (66.67%) came from those who believe they lack basic tourism skills including the Filipino core values as well as lack of soft skills wherein identified examples consist of communication skills, social skills, attendance problems (absenteeism), lack of aspirations, and lack of effort in learning new skills.

Lastly, 33.33% of respondents identified that lack of socio-emotional skills (example: mindfulness), lack of leadership and people management skills, and lack of industry specific STEM knowledge are also among the reasons for underperforming employees' poor performance.

It may be recalled that in a study conducted by Pioneer Professional Academy of Asia in 2019, communication and interaction skills as well as leadership and management skills were among the top five tourism-related competencies that tourism industry workers and practitioners should possess.

Table 55.
Percentage of Tourism Enterprises with Underperforming Employees per Reason

Reason	%
Lack of basic tourism skills including Filipino core values (e.g, tourism awareness (101), tour guiding and coordination, accommodation and hospitality skills, destination marketing and promotions, etc.)	66.67
Lack of specialized technical skills for the tourism sector	100.00
- Accommodation	
- Tour guiding	
- Housekeeping	
- Lacking knife skills	
Lack of advanced tourism sector skills	100.00
- Social skills	
Lack of soft skills (e.g. communication and interaction, interpersonal skills, collaboration and teamwork, multicultural awareness, personality development, etc.)	66.67
- Communication skills	
- Attendance problems (absenteeism), lack of aspirations, lacking effort in learning new skills	
Lack of socio-emotional skills (e.g. extraversion, emotional stability, agreeableness, grit, consciousness, decision-making, openness, etc.)	33.33
- Mindfulness	
- Inability to accept mistakes/constructive criticisms	
Lack of Leadership and People Management Skills	33.33
Lack of language skills (including listening, speaking, reading, and writing skills; foreign-language skills)	0.00
Lack of office and admin skills	0.00
Lack of digital skills (e.g., effective technology use, system and software knowledge, social media knowledge and skills, video production, etc.)	0.00
Lack of industry specific STEM knowledge (e.g. patterns; cause and effect; scale, proportion, and quantity; etc.)	33.33

Note. Multiple responses were allowed.

Only three tourism enterprises responded.

In addition to the table above, Table 56 followed-up by asking how frequent various actions or interventions were implemented to those employees performing poorly. All of the given actions/interventions received a response that enterprises implement them sometimes or when deemed necessary with 'application of corresponding disciplinary procedures of the company', 'addition of people to complement the work', and 'changing work practices' obtaining the highest with 100% of responses.

Only two interventions however, received responses under 'Never' which are 'reallocating work' and 'review of appraisals or performance' with 33.33%. The enterprise under the recreational activities industry added additional actions or interventions they implement within their organization. When it comes to underperforming employees they sometimes acknowledge good work and also provide social activities when necessary.

Although not tabulated (because responses were received only from micro and large enterprises), these actions or interventions were analyzed in terms of enterprise size, specifically asset size. Only three enterprises responded that they indeed have underperforming employees, one of these three is a micro enterprise, and according to them, they sometimes or when necessary, implement all of the given actions or interventions except the reallocation of work and conducting a performance review which they never do. The two other enterprises under large asset size, identified that they both sometimes 'reallocate work', 'apply corresponding disciplinary procedures of the company', 'add people to complement work', and 'change work practices' when it comes to underperforming employees.

Table 56.
Distribution of Tourism Enterprises by Frequency of Implementation of Various Actions or Interventions for Underperforming Employees

Actions/Interventions	Percentage of Implementation (%)			
	Never	Sometimes or when necessary	Always or regularly	Total
Increase training activity / spend or increase/expand trainee programs	0.00	66.67	33.33	100.00
Conduct of re-training	0.00	66.67	33.33	100.00
Reallocating work	33.33	66.67	0.00	100.00
Review of appraisals / performance	33.33	33.33	33.33	100.00
Conduct mentoring	0.00	66.67	33.33	100.00
Intensify supervision of staff	0.00	66.67	33.33	100.00
Apply corresponding disciplinary procedures of the company	0.00	100.00	0.00	100.00
Add people to complement the work	0.00	100.00	0.00	100.00
Change work practices	0.00	100.00	0.00	100.00

In connection to Table 57, enterprises with employees having the potential to perform more demanding duties were also asked if they have undertaken actions and interventions to develop or utilize such potentials. The enterprise under the recreational activities industry said yes, most of the enterprises under the hotel accommodation and tangible cultural services industry also responded positively, specifically 83.33 and 81.82% of them respectively. Responses under Mabuhay accommodations industry on the other hand, was the lowest with 33.33%.

Table 57.

Percentage of Tourism Enterprises that have Undertaken Actions or Interventions to Employees with the Potential to Perform More Demanding Duties by Industry

Tourism Industry	%
Accommodation	
• Hotel	83.33
• Mabuhay Accommodation	33.33
Recreational Activities (Sun and Beach)	100.00
Tangible Cultural Services (Museum)	81.82

Table 58 investigates what specific actions or interventions were done by these enterprises in terms of these high-potential employees. Among the presented interventions, 'learning and development' received the most number of responses with 84.21%, this was followed by 'job reassignments' (36.84%) and 'salary increase' (26.32%). 'Promotion' was next with 21.05%, while 'other incentives (e.g. travel)' and other interventions not presented as options obtained the lowest number of responses with 15.79 and 5.26% respectively. The additional intervention under 'others' were given by the enterprise under the recreational activities industry stating that they also provide them 'awards and recognition'.

Table 58.

Percentage of Tourism Enterprises that have Undertaken Actions or Interventions to Employees with the Potential to Perform More Demanding Duties

Response	%
Learning and Development (e.g., training, mentoring, etc.)	84.21
Job reassignments (e.g., job rotation, deployment, etc.)	36.84
Promotion	21.05
Salary Increase	26.32
Other incentives (e.g., travel, etc.)	15.79
Others	5.26

Note. Multiple responses were allowed.

In terms of asset size, given the same interventions in the previous table, it can be seen from Table 54 that when it comes to learning and development for high-potential employees, all (100%) of the enterprises of any size implement it.

Job reassignments are being done by half (50%) of the small, medium and large enterprises while promotion is only offered by medium (50%) and large enterprises (50%). Medium (50%) and large enterprises (50%) also offer salary increases along with a small portion of small-sized enterprises.(16.67%). For other incentives (e.g. travel), it was offered by half (50%) of micro and medium enterprises along with a small percentage of large enterprises (16.67%).

Table 59.
Percentage of Tourism Enterprises that have Undertaken Actions or Interventions to Employees with the Potential to Perform More Demanding Duties by Asset Size

Response	Asset Size (%)			
	Micro	Small	Medium	Large
Learning and Development (e.g., training, mentoring, etc.)	100.00	100.00	100.00	100.00
Job reassignments (e.g., job rotation, deployment, etc.)	0.00	50.00	50.00	50.00
Promotion	0.00	0.00	50.00	50.00
Salary Increase	0.00	16.67	50.00	50.00
Other incentives (e.g., travel, etc.)	50.00	0.00	50.00	16.67
Others	0.00	0.00	0.00	16.67
- Awards and recognition				

Contrary to the positive response from Table 58, Table 60 wanted to know the reasons why enterprises are not undertaking actions or interventions to utilize the potential of high-performing employees (*those who answered 'No'*). As observed below, most of these enterprises responded that although they are aware of their potential, there are no definite plans made yet (66.67%). Next to these enterprises are those who responded that they are not fully aware of these employees' potential and what it can do (33.33%) as well as those who responded that their organizational structure and work practices currently do not allow changes to acknowledge and do something about such employees (33.33%). No responses however, were obtained under the fourth reason (*the organization is aware of the potential performance capability and it will review and re-deploy if necessary*).

Table 60.
Percentage of Tourism Enterprises that have not Undertaken Actions or Interventions to Employees with the Potential to Perform More Demanding Duties by Reasons

Response	%
The management is not fully aware of the potential capability.	33.33
The management is aware of the potential, but there are no definite plans yet.	66.67
The current organizational structure and work practices do not allow changes.	33.33
The organization is aware of the potential performance capability and it will review and re-deploy if necessary.	0.00

Note. Multiple responses were allowed.

The question is only applicable to three tourism enterprises.

Table 61 wanted to find out the educational attainment needed for vacant positions in accordance with the enterprises' policy requirements. As seen below, most of the positions offered by the observed tourism enterprises require higher education graduates—baccalaureate and above (57.22%), positions for basic education graduates—either old curriculum high school graduates or senior high school K-12

graduates were then prioritized with a distribution of 35.33%. Following this, TechVoc course graduates were given 5.87% of the positions while 1.59%—the lowest of the distribution was for those that have no level of education completed.

Table 61.
Distribution of Positions by the Educational Attainment Policy of the Existing Job Positions

Requirements by Policy (Highest Educational Attainment)	%
No level Completed	1.59
Basic Education Graduate (HS Grad Old Curriculum or SHS Graduate K-12 Curriculum)	35.33
Tech Voc Course Graduate	5.87
Higher Education Graduate (Baccalaureate and Above)	57.22
Total	100.00

The educational attainments above based on the enterprises' policies were further analyzed in Table 62. Looking at the distribution by the type of tourism industry, it can be seen that positions requiring no educational qualification were offered by the enterprise under the recreational activities industry only (3.03%). Positions needing basic education graduates are highest under the Mabuhay accommodation industry (41.67%) followed by the recreational activities enterprise (38.62%), hotel accommodation (28.67%) and tangible cultural services enterprises at 20%.

Positions in which TechVoc course graduates are needed are highest under the tangible cultural services industry (20%) while the other tourism industries seem to have low distributions, with percentages below 10%. For positions requiring higher education graduates, all of the tourism enterprises are above 50%---with hotel accommodation enterprises obtaining the highest percentage of the distribution with 66.67%, then by tangible cultural enterprises (60%), mabuhay accommodation enterprises (55%), and the recreational activities enterprise (52.42%).

However, when cross analyzed with the distribution of the existing workers (Table 23) and the vacancies (Table 3) by educational attainment, it would appear that although by policy, the highest percentage of the positions that require TechVoc graduates are in the Tangible Cultural Services (Museum), in terms of the implementation, the tourism industry have the lowest share in both existing and job vacancies.

Table 62.
Distribution of the Existing Job Positions by the Educational Attainment Policy by Industry

Highest Educational Attainment	Tourism Industry (%)			
	Accommodation		Recreational Activities (Sun and Beach)	Tangible Cultural Services (Museum)
	Hotel	Mabuhay Accommo-		

	ation			
No level Completed	0.00	0.00	3.03	0.00
Basic Education Graduate (HS Grad Old Curriculum or SHS Graduate K-12 Curriculum)	28.67	41.67	38.62	20.00
Tech Voc Course Graduate	4.67	3.33	5.92	20.00
Higher Education Graduate (Baccalaureate and Above)	66.67	55	52.42	60.00
Total	100.00	100.00	100.00	100.00

Aside from the policy requirement covering educational attainments, Table 63 then examines other provisions obligated by the participating tourism industries. Among the three, continuous learning/developmental activities are required by 51.59% of the tourism enterprises, this was then followed by 43.57% of tourism enterprises requiring induction training of more than two weeks before the post-holder can perform the given job. While the lowest percentage of responses were obtained by those that require at least three years of industry-relevant experience to carry out the specific job (30.75%).

Table 63.
Percentage of Tourism Enterprises per Specific Policy Requirements of the Existing Job Positions

Requirements by Policy	%
Induction training of more than two weeks before the post-holder can perform assigned work	43.57
Continuous learning/developmental activities	51.59
At least 3 years of industry-relevant experience to do the job	30.75

Looking at the table below (Table 64), the same additional requirements mentioned in the previous table were paired or analyzed in terms of the tourism industry classification. For the first requirement—induction training of more than two weeks before the post-holder can perform assigned work, the recreational activities enterprise responded that all of its positions require such provision (100%), followed by the hotel accommodation enterprises with 88.33% of positions. Continuous learning/developmental activities were given to 58.48% of positions under the tangible cultural services industry (highest) while hotel accommodation enterprises followed with a total of 57.50% of job positions.

The highest percentage of positions requiring at least three years of industry-relevant experience before carrying out the job is obtained also by the tangible cultural services enterprises (43.71%), and then by enterprises under hotel accommodations with 21.67% of positions. It can also be observed however, that Mabuhay accommodation enterprises had the lowest percentages for all the presented requirements.

Table 64.
Percentage of Tourism Enterprises per Specific Policy Requirements of the Existing Job Positions by Industry

Requirements by Policy	Tourism Industry (%)
------------------------	----------------------

	Accommodation		Recreational Activities (Sun and Beach)	Tangible Cultural Services (Museum)
	Hotel	Mabuhay Accommodation		
Induction training of more than two weeks before the post-holder can perform assigned work	88.33	16.67	100.00	21.36
Continuous learning/developmental activities	57.50	23.33	25.00	58.48
At least 3 years of industry-relevant experience to do the job	21.67	6.67	15.00	43.71

In Table 65, the majority of the participating enterprises have identified that at least 25% of their female employees are in STEM-related occupations, and it is true for all of the tourism industries except for Tangible Cultural Services (Museum). For the latter, 63.64% of women occupy less than 25% of the STEM-related jobs. When linked to the distribution of employees by occupational type and sex, it may be recalled that the highest percentage of female employees are in clerical support work including front office and reception type of work.

Table 65.
Percentage of Women in STEM-related Occupations by Industry

Tourism Industry	Percentage of Tourism Enterprises (%)		
	less than 25	25 or more	Total
Accommodation			
- Hotel	33.33	66.67	100.00
- Mabuhay Accommodation	50.00	50.00	100.00
Recreational Activities (Sun and Beach)	0.00	100.00	100.00
Tangible Cultural Services (Museum)	63.64	36.36	100.00

The table below presents the reasons for women's low representation in STEM-related occupations. The common responses include limited job opportunities especially provided the nature of the enterprise, low female applicants, and lack of control over the recruitment process. It may be observed that the reasons rely more on the enterprises' capacity to employ rather than any other matters that may be controlled or directly addressed by the management.

Table 66.
Reasons for Low Representation of Women in STEM-related Occupations by Industry

Tourism Industry	Reasons
Accommodation	No Response Provided
- Hotel	- Small employee size - Gardening
- Mabuhay Accommodation	- Positions and job titles are inexistent. - The transient house is too small for complicated job types. - Transient house does not require complicated operations and

	management.
Recreational Activities (Sun and Beach)	Not Applicable
Tangible Cultural Services (Museum)	<ul style="list-style-type: none"> - Main office personnel section dictates the qualifications for the said position - Recruitment comes from the Archdiocese (the museum doesn't have female employee) - The museum is not that big enough yet to require such roles - Insufficient resources to hire such jobs - There are no female employees in the facility/museum - Such positions if needed are being outsourced temporarily from the central office. - Museum has no control over the recruitment process. - Position is not required. - Low number of female applicants

The occupations listed in Table 67 are mostly under technicians and professionals in terms of the occupational type. This low representation of women is consistent when cross-analyzed with Table 15 showing that these two occupational types are male-dominated occupations.

Table 67.
STEM-related Occupations with Low Representation of Women by Industry

Tourism Industry	STEM-related Occupations
Accommodation	No Response Provided
- Hotel	<ul style="list-style-type: none"> - Engineering Technician - Duty Engineer - Hotel Maintenance - Repair Maintenance - Engineering - IT - Finance
- Mabuhay Accommodation	No Response Provided
Recreational Activities (Sun and Beach)	Not Applicable
Tangible Cultural Services (Museum)	<ul style="list-style-type: none"> - Conservator - Engineer - Architect - Administrative Aide - Museum Technician - Lab Aide - Museum Researcher

4.4 Emerging Skills Associated with Industry Developments

In terms of the distribution on the impact of the projected skills demand over the next five years, Table 68 below shows a significant shift in more demanded competencies,

emphasizing the need for proactive adaptation and investment in human capital. Understandably, the emerging skill on Digital Technology and Solutions has the highest percentage overall at 76.19%, highlighting the pervasive impact of digital technologies in light of the digital transformation efforts pushed by the tourism industry in the new normal. To further support this, Digital Registration Process (61.91%) is also one of the top in-demand emerging skills. Beyond technology, the data highlights a growing emphasis on safety, preparedness, and inclusivity. The second highest in-demand emerging skill is Emergency Response System (66.67%). Crisis Management also has a large demand at 61.9%. It can be recalled that aside from digital transformation, health and safety are also emphasized in the sector due to the pandemic. Moreover, this points to a heightened focus on responsible and resilient tourism practices. Other emerging skills with increasing demand include Basic Foreign Language (57.14%) and Sign Language Interpretation (57.14%), further reinforcing this trend towards inclusivity and global connectivity.

While there are more emerging skills demanded, there is still a significant number of emerging skills that will stay the same in the next five years. This suggests that while new skills are crucial, core competencies will remain relevant. Of these, hygiene preparedness (61.9%) has the highest percentage share of an emerging skill that will stay the same in the next five years, followed by complaints handling (57.14%), and business continuity, customer relationship management, and effective customer service/customer engagement skills each at 52.38%.

The relatively low percentages in the "Fewer Skills Demanded" category indicate that the evolving landscape is more likely to add to skill requirements rather than replace existing ones entirely. All of the listed emerging skills, except for the use of hotel reservation platform (e.g., Airbnb) are either demanded or staying the same. It should be noted, however, that an equal share of respondents view the use of hotel reservation platform (e.g., Airbnb) as staying the same and less demanded (both at 19.05%), while the majority found it not applicable.

For the emerging skills that are not applicable to the respondents, data shows that while high percentages in certain areas (e.g., service robots) may reflect a realistic assessment of their limited adoption in the near future, others (e.g., "AI and Big Data") might point to a lack of understanding or awareness regarding their potential impact. This highlights the need for further education and dialogue to ensure the industry is prepared for the future. However, it should also be noted that the same percentage of respondents view AI and Big Data as demanded and not applicable. This may be due to the varying levels of digital adoption across enterprises relative to different factors, such as size and profitability. Tech-driven enterprises may see them as essential, while others with limited automation or data reliance may find them irrelevant to their operations. Furthermore, emerging skills on Automated Ordering System, Service Robots, Virtual Reality/ Augmented Reality, Use of Hotel Reservation Platform (e.g., Airbnb), Remote Work Skills, Brewers, Chemical Handling, Nature Interpretation and Guiding, Parks and Gardens Rangers, and Pastry and Specialty Chefs all have the largest percentage of being not applicable to the tourism enterprises respondents. One probable reason for this is the varying nature of their businesses, with some relying more on traditional operations and in-person services rather than advanced technologies or specialized roles.

Table 68.
Percentage Distribution on the Impact of Skills Demand in Emerging Skills for 5 Years

Industry Developments	Emerging Skills	Impact on Skills Demand (%)				
		More skills demanded	Staying the same	Fewer skills demanded	Not Applicable	Total
Fourth Industrial Revolution	AI and Big Data (e.g., recommender systems in mobile devices)	33.33	19.05	14.29	33.33	100.00
	Automated Booking System	38.10	28.57	19.05	14.28	100.00
	Automated Ordering System	23.80	14.29	19.05	42.86	100.00
	Automated Systems for Front Office Services	38.10	9.51	14.29	38.10	100.00
	Digital Scanning (i.e. digitization)	47.62	28.57	14.29	9.52	100.00
	Effective Technology Use (e.g. use of digital platforms)	38.10	38.10	9.51	14.29	100.00
	Online Market Identification	47.62	23.81	9.52	19.05	100.00
	Service Robots	9.52	4.77	9.52	76.19	100.00
	Use of Security Technologies (e.g. CCTV Operation)	28.57	47.62	14.29	9.52	100.00
	Virtual Reality/ Augmented Reality	33.33	23.81	0.00	42.86	100.00
	Technology and Digitalization in Tourism	52.37	14.29	14.29	19.05	100.00
	Future of Tourism in the 4th Industrial Revolution	47.62	4.76	14.29	33.33	100.00
	Use of Hotel Reservation Platform (e.g., Airbnb)	14.29	19.05	19.05	47.61	100.00
New Normal	Business Continuity	23.81	52.38	0.00	23.81	100.00
	Contact Tracing	33.33	38.10	9.52	19.05	100.00
	Contactless Transaction	42.86	23.80	19.05	14.29	100.00
	Data Collection	47.62	33.33	4.76	14.29	100.00
	Product and Services Marketing and Promotions (e.g. Digital Marketing)	42.86	28.57	9.52	19.05	100.00
	Digital Registration Process	61.91	19.05	9.52	9.52	100.00
	Digital Technology and Solutions	76.19	9.52	4.77	9.52	100.00
	Financing Digitization (e.g. Contactless Payment)	38.10	23.81	9.52	28.57	100.00
	Hygiene Preparedness	23.81	61.90	4.77	9.52	100.00
	Online Writing	33.33	47.62	4.76	14.29	100.00
	Remote Work Skills	9.52	42.86	4.76	42.86	100.00

Industry Developments	Emerging Skills	Impact on Skills Demand (%)				
		More skills demanded	Staying the same	Fewer skills demanded	Not Applicable	Total
	Research	28.57	38.10	9.52	23.81	100.00
	Telework	9.52	42.86	9.52	38.10	100.00
	Tourism Planning	38.10	33.33	9.52	19.05	100.00
	Video Production	47.62	23.81	9.52	19.05	100.00
STEM (Science, Technology, Engineering, Mathematics)	Basic Foreign Language (i.e. Chinese, Japanese, Korean)	57.14	4.77	9.52	28.57	100.00
	Brewers	9.52	14.29	4.76	71.43	100.00
	Chemical Handling	23.81	23.81	0.00	52.38	100.00
	Effective Communication of Biodiversity, Natural, and Cultural Assets	47.62	23.81	0.00	28.57	100.00
	Knowledge and Information Sharing	38.09	42.86	4.76	14.29	100.00
	Museums/Zoos/Aquariums Personnel	28.57	28.57	4.76	38.10	100.00
	Nature Interpretation and Guiding	28.57	9.52	4.77	57.14	100.00
	Nature Photography	23.81	14.29	0.00	61.90	100.00
	Parks and Gardens Rangers	14.29	9.52	4.76	71.43	100.00
	Pastry and Specialty Chefs	23.81	9.52	4.77	61.90	100.00
	Sign Language Interpretation	57.14	4.76	4.77	33.33	100.00
Other Industry Developments (e.g Philippine laws, code, roadmap)	Complaints Handling	33.33	57.14	0	9.53	100.00
	Crisis Management (e.g., Mental Health Awareness, Disaster Risk Reduction and Management)	61.9	33.33	0	4.77	100.00
	Customer Relationship Management	38.1	52.38	0	9.52	100.00
	Destination Resilience	28.57	42.86	0	28.57	100.00
	Effective Customer Service/Customer Engagement Skills	28.57	52.38	4.76	14.29	100.00
	Emergency Preparedness and Resiliency	57.14	38.1	0	4.76	100.00
	Emergency Response System	66.67	28.57	0	4.76	100.00
	Financial, Pricing, and Revenue Management	28.57	47.62	0	23.81	100.00
	Inclusive Tourism (Cultural Sensitivity)	57.14	38.1	0	4.76	100.00
	Inclusive Tourism (Gender Sensitivity)	52.38	38.1	0	9.52	100.00

Industry Developments	Emerging Skills	Impact on Skills Demand (%)				
		More skills demanded	Staying the same	Fewer skills demanded	Not Applicable	Total
	Barrier Free Tourism - Accessibility (PWD Facilitation)	57.14	38.1	0	4.76	100.00
	Muslim-friendly tourism (e.g., Halal Tourism)	47.62	38.1	0	14.28	100.00
	Tourism Product Development	42.86	33.33	0	23.81	100.00
	Product and Services Design	47.62	28.57	0	23.81	100.00
	Product and Services Packaging	38.1	23.81	4.76	33.33	100.00
	Safety and Health Protocols/ Occupational Safety	47.62	42.86	0	9.52	100.00
	Sustainable Tourism Governance (in light of the Mandanas Ruling Implementation)	52.38	23.81	4.76	19.05	100.00
	Visitor Management	47.62	42.86	0	9.52	100.00
	Filipino Brand of Service Excellence	52.38	42.86	0	4.76	100.00
	Destination Marketing and Promotions	52.38	28.57	0	19.05	100.00
	Tourism Branding and Marketing	52.38	28.57	0	19.05	100.00
	Tourism Trends and Forecasts	52.38	23.81	0	23.81	100.00

The following tables (Tables 69-73) show data on how tourism enterprises are preparing for the emerging skills needs – whether they are aware and ready or have already taken action, and what are the specific actions they have taken.

Awareness of emerging skills is relatively high, at least 50% in most industries and with the hotel industry completely aware and ready. However, the Tangible Cultural Services (Museum) industry is not aware nor ready for the emerging skills. Translating the awareness and readiness for emerging skills also poses a challenge. The accommodation industry as a whole has more respondents that have taken action relative to the emerging skills. In contrast, none of the respondents from the Recreational Activities (Sun and Beach) industry have taken action. This is a major red flag, especially if emerging skills are crucial for this sector's future. It suggests a potential lack of awareness, resources, or understanding of the importance of these skills. While not as high as hotels, the Tangible Cultural Services (Museum) industry has 45.45% of its respondents that have taken action, which is considerably better than recreational activities. This suggests some level of recognition and response to the need for emerging skills in this sector.

Meanwhile, the analysis of tourism enterprises' actions on emerging skills (Table 71) reveals a strong focus on human resource development, with 100% of proactive enterprises prioritizing upskilling and reskilling their workforce (Table 72). Additionally, 81.82% have established structured plans, reflecting a proactive stance towards skill adaptation. However, investment in equipment and materials is lower at 63.64%, suggesting that financial constraints and uncertainty about technological needs may be influencing priorities. Despite the high awareness of emerging skills, the adoption rate varies across industries, with hotels and accommodations demonstrating greater readiness compared to sectors like Tangible Cultural Services and Recreational Activities (Sun and Beach), which face more barriers.

The primary challenges preventing some enterprises from taking action (Table 73) include financial constraints (77.78%), lack of digital infrastructure (77.78%), and inadequate physical infrastructure (44.44%). The disparity in digital adoption levels may explain why some emerging skills, such as AI and Big Data, are viewed as both highly demanded and not applicable. Larger, tech-driven enterprises see these as essential, while smaller or traditionally operated businesses may not yet perceive their relevance. Additionally, skills related to automation, remote work, and specialized roles in niche tourism areas are often deemed inapplicable, reflecting the sector's reliance on traditional operations. Addressing these systemic issues requires targeted financial assistance, investments in digital connectivity, and shared training facilities. Additionally, promoting cost-effective training models, such as online courses and public-private partnerships, can bridge skill gaps. By implementing these interventions, tourism enterprises can create a more resilient and competitive workforce, ensuring sustainable adaptation to emerging industry demands.

Table 69

Percentage of the Tourism Enterprises that are Aware and Ready for the Emerging Skills by Industry

Tourism Industry	%
Accommodation	
• Hotel	100.00
• Mabuhay Accommodation	50.00
Recreational Activities (Sun and Beach)	54.55
Tangible Cultural Services (Museum)	0.00

Note. 13 of the 21 tourism enterprises are aware and ready for the emerging skills

Table 70

Percentage of the Tourism Enterprises that have Taken Actions relative to the Emerging Skills by Industry

Tourism Industry	%
Accommodation	
• Hotel	83.33
• Mabuhay Accommodation	50.00
Recreational Activities (Sun and Beach)	0.00
Tangible Cultural Services (Museum)	45.45

Table 71

Percentage of the Tourism Enterprises that are Ready and Have Taken Actions for the Emerging Skills by Relative Actions Taken

Tourism Industry	%
Established plans to address the requirements.	81.82
Started some initiatives/programs in terms of preparing your human resource.	100.00
Started some initiatives/programs for the acquisition of equipment and materials relevant for the requirements.	63.64

Note. Multiple responses were allowed.

Table 72

Percentage of the Tourism Enterprises that are Ready and Have Taken Actions for the Emerging Skills by Preparations on Human Resource

Tourism Industry	%
Hire new employee/s who have the required skills	54.55
Reskill existing employee/s to acquire the required competencies	63.64
Upskill existing employee/s to acquire the required competencies	100.00

Note. Multiple responses were allowed. The table reflects the responses of tourism enterprises that are aware, ready, and have taken actions towards emerging skills.

Table 73

Percentage of Tourism Enterprises by Reasons Why No Action Is Taken for the Emerging Skills

Reasons	%
No budget to conduct the training/learning and development initiatives	77.78
No physical infrastructure/facility to conduct training/learning and development initiatives	44.44
No digital infrastructure/facility to conduct training/learning and development initiatives	77.78
Others	11.11
- Lack of person to hire/availability of the workforce	

Note. Multiple responses were allowed.

4.5 Green Jobs and the Tourism Sector

The recent health crisis amplified the fact that a healthy life and workplaces, productive economies and decent work all depend on a healthy environment. This truth is also very much applicable to the tourism sector, given the fact that it directly impacts and is also impacted by the socio-economic and environmental dimensions of sustainability as well as climate change (Organisation for Economic Co-operation and Development, 2021a, 10).

In connection to this, Section E explores the various aspects and components relative to the implementation of the Green Jobs Act. Starting with Table 74, it explores the covered enterprises' efforts and plans towards the current trend on tourism sustainability in the form of 'green jobs'. Green jobs, as defined in the study, are jobs that contribute to the

preservation and restoration of the environment. Examples of this are sustainable tour guides, environmental architecture, environmental consultants, etc.

When asked to what extent the observed enterprises started to create jobs that will contribute to decarbonization (decarbonization being the decreasing of CO₂ (Carbon Dioxide) and greenhouse gas emissions caused by the burning of fossil fuels for electricity generation), 38.10% of respondents responded that they have no action so far and no plan in the near future, the same percentage of respondents also responded that they have no action so far but they are planning to act. Those that already created or changed some jobs as described obtained the lowest percentage of 23.81%.

When asked about their extent in contributing to the protection of the ecosystem and biodiversity, most (42.86%) of the respondents answered that they have no action so far but they are planning to act on it while 33.33% have created or changed some jobs.

As for their efforts in contributing to energy, materials, and water consumption reduction, the highest percentage of respondents stated that they already have created or changed some of their jobs (52.38%) while the lowest percentage stated that they have no action so far and have no plan regarding this in the future.

The same responses can be observed when it comes to minimization of waste and pollution, wherein most of the respondents answered that they are already creating or changing some jobs (52.38%) while the lowest percentage (19.05%) have no action and future plans when it comes to such matters.

For all aspects of green jobs as indicated in the table below, 2 out of 21 participating enterprises have no action so far and no plan in the near future, which still translates to the majority of the enterprises moving towards greening the industry.

Table 74.
Distribution of the Tourism Enterprises by Extent of Implementation of Different Aspects of Green Jobs

Aspects of Green Jobs	Extent of Implementation (%)			Total
	No action so far and no plan in the near future	No action so far but planning to act	Have created/changed some jobs as described	
...contribute to 'decarbonization'	38.10	38.10	23.81	100.00
...contribute to 'protecting the ecosystem and biodiversity'	23.81	42.86	33.33	100.00
...contribute to 'reducing energy, materials and water consumption'	19.05	28.57	52.38	100.00
... contribute to 'minimizing waste and pollution'	19.05	23.81	57.14	100.00

Table 75 below presents the example of provisions given by the observed tourism enterprises when it comes to 'green jobs'. Few job positions and disciplines were given as

examples such as environmental engineers, environmental interior design, pollution control officers, and green/environmental architecture. Pollution Control Officers or PCOs according to one of the observed tourism enterprises, are now required by the Department of Environment and Natural Resources (DENR).

Environment-friendly practices were also provided such as the non-usage of single-use plastics, installation of an in-house wastewater treatment facility wherein treated waters are being used in the enterprise’s garden, plans on maximizing waste materials and pollution/repurposing of old/unused items, active recycling, regular participation to earth hour, reduction of energy, materials, and water consumption, waste segregation, sharing of information/advocacies through social media, and conduct of research works on the Philippine ecosystem and biodiversity.

Such research was being done by one of the enterprises under the tangible cultural services, during the pandemic and the temporary closure of the museum, they still provided educational information to their clients and customers using social media. They posted articles using their Facebook page and Instagram usually about the preservation and conservation of cultural heritage, flora and fauna. They also wrote articles on national and international celebrations specially on preservation and conservation of the environment and their advocacy in promoting the green movement. Another museum stated that they are now reducing the use of materials. They also sometimes release a memo that specifies the period to lessen their water consumption. During events, after the pandemic especially after the new normal, they have already adopted online programs. They also no longer prepare tarpaulins and other materials that are non-biodegradable (e.g. marketing paraphernalia), opting to make and distribute such materials online to lessen carbon.

Several management systems and programs were also mentioned such as Plant for Planet, deep well system, use of online reservation systems, and the participation in programs facilitated by the local government. An example was given from the local government program of Angeles wherein plastic trash were collected and given to their city hall to be exchanged for rice, this, as a result, encourages segregation. Ultimately, these collected plastics are converted by the LGU as floor tile blocks.

An enterprise under Mabuhay accommodation stated that when it comes to greening practices, their staff are encouraged to use green transportation such as bicycles; there is also a mention of the stricter implementation of the Quezon City government in areas such as solid waste management. Sewerage system plans are also required in view of the Philippine Clean Water Act of 2004 (RA 9725) and the Philippine Clean Air Act of 1999 (RA 8749). On the other hand, the enterprise under the recreational activities industry is planning to utilize renewable energy such as solar energy in its facility hopefully by 2023 as being also established in a mangrove area provides more effort to be environment-friendly.

Table 75.
Examples of Organizational Provisions from any Aspects of Green Jobs by Industry

Tourism Industry	Provisions
Accommodation	
<ul style="list-style-type: none"> Hotel 	No to Single Use Plastic

	Plant for Planet
	Installation of an in-house wastewater treatment facility (treated waters are being used in the garden)
	Environmental Engineer
	Environmental interior design (repurposing of old items)
	Plans to maximize waste materials and pollution
	Active Recycling
• Mabuhay Accommodation	Minimizing use of plastic
	Training and assignment of a Pollution Control Officer
Recreational Activities (Sun and Beach)	Pollution Control Officer (Requirement of DENR)
Tangible Cultural Services (Museum)	Regular Participation to Earth Hour
	Online Reservation for Museums
	Participation in Local Government Programs (Angeles' Program of swapping plastic trash to rice grains).
	Deep Well System
	Reduction of energy, materials and water consumption
	Waste Segregation (Biodegradable, non-biodegradable, recyclable)
	Environment Architecture
	Green Architecture
	Research studies on the ecosystem and biodiversity across the Philippines
	Sharing of Information/Advocacies through Social Media**

Among the 19 tourism enterprises who have plans in any of the aspects of green jobs, only six have received or sought support from any of the government agencies stipulated in the Philippine Green Jobs Act. Excluding the recreational activities (which only has one respondent), not even half of the enterprises for all of the tourism industries have taken advantage of the government's support when it comes to green jobs as shown in Table 76.

Table 76.
Percentage of Tourism Enterprises that have Received/Sought Support from any Government Agency by Industry

Tourism Industry	%
Accommodation	
• Hotel	20.00
• Mabuhay Accommodation	33.33
Recreational Activities (Sun and Beach)	100.00
Tangible Cultural Services (Museum)	30.00

For those that have received or sought government support, the enterprises were asked the specific government agencies that they have connected with (*take note that the list of government agencies are still based on the provisions in the Philippine Green Jobs Act*). The most common responses in Table 77 are DENR and DOT, which may be expected provided that the enterprises are directly governed by several regulations and required certifications under these two Agencies. For instance, accommodation industries undergo DOT's

accreditation process. Additionally, it was shared by the associations that for accommodation and food and beverages, the DENR requires the establishments to have certain occupations including the Pollution Control Officer.

Table 77.

Government Agencies where the Facilities Receive/Seek Assistance in relation to Green Jobs by Industry

Tourism Industry	Government Agencies
Accommodation	Department of Environment and Natural Resources (DENR)
• Hotel	Department of Tourism (DOT)
• Mabuhay Accommodation	Department of Environment and Natural Resources (DENR)
	Department of Tourism (DOT)
Recreational Activities (Sun and Beach)	Department of Environment and Natural Resources (DENR)
	Department of Tourism (DOT)
Tangible Cultural Services (Museum)	Department of Agriculture (DA)
	Department of Environment and Natural Resources (DENR)
	Department of Public Works and Highways (DPWH)

Note. Multiple responses were allowed.

In terms of the specific support received, the highest percentage (33.33%) is equally distributed to (1) Facility, curriculum, and instructional materials development; (2) Special business facilitation program for business enterprises creating green jobs; (3) Sustainable tourism planning; and Green building practices. Most of which are related to the development and expansion of the infrastructure needed to implement green jobs.

Table 78.

Percentage of Tourism Enterprises in terms of Support Received/Sought from the Government Agencies

Ways/Aspects of Support	%
Tax incentives and/or import duties exemption programs	0.00
Technical assistance to ensure labor law compliance to green jobs	16.67
Data/Information request as reference in the formulation of strategies and potential green jobs development	16.67
Facility, curriculum, and instructional materials development	33.33
Program registration, assessment, and certification including green goods and services	0.00
Skills development relating to Green Jobs/Skills	0.00

Special business facilitation program for business enterprises creating green jobs	33.33
Business development support (e.g. prototyping/modeling of technologies, clean technology development)	0.00
Environmentally friendly modes of transport	0.00
Sustainable tourism planning	33.33
Green building practices	33.33

Note. Multiple responses were allowed.

Despite 19 of 21 tourism enterprises having plans for any of the aspects of green jobs, unfortunately, only two are aware of the emerging skills resulting from green jobs. Both of the enterprises are from Tangible Cultural Services (Museum) specifically a part of the National Museum. When the two enterprises were asked to identify these specific green jobs, both identified the following: Chief Sustainability Officer, Conservation Scientists, and Soil and Plant Scientists.

Table 79.

Percentage of Tourism Enterprises that are Aware of Emerging Skills Resulting from Green Jobs by Industry

Tourism Industry	%
Accommodation	
• Hotel	0.00
• Mabuhay Accommodation	0.00
Recreational Activities (Sun and Beach)	0.00
Tangible Cultural Services (Museum)	18.18

Table 80 lists specific green industry development for the tourism industry. Among the list, only Sustainable Food Value Chain (e.g., Food Waste Monitoring and Reduction in Kitchens) had been identified by the majority of the respondents as not applicable to their specific enterprise. This despite being shared in the industry consultations that food safety has been given more importance in the food industry after the pandemic. Hence, the need to train in food safety management, food waste management, and plastic management (upscaling and recycling).

Further, since as reflected in Table 79, almost all of the enterprises lack awareness about emerging green skills, the majority of the enterprises rated as highest the need to have knowledge on all of the green industry developments — with the largest share being given to sewerage system and septage management, solid waste management facilities, and water supply and sanitation system. In terms of competencies, the highest percentage share has been given to the same top 3 developments in need for enhanced knowledge.

Table 80.

Percentage of the Tourism Enterprises by ‘Green’ Industry Developments Relevant to (Current and Near-future) Business Needs

Green Industry Developments	Areas with Business Need (%)			
	Knowledge (Critical Understanding, theories, and principles)	Skills (Skills mastery and innovation for solving complex problems)	Competencies (Managing activities and tasks)	Not Applicable
Climate Change Impact Integration on Products	57.14	23.81	28.57	42.86
Green Design	61.90	52.38	47.62	19.05
Green Financing	57.14	38.10	33.33	38.10
Green Transportation (e.g., use of bicycles)	57.14	47.62	28.57	38.10
Nature Preservation, Protection, Restoration, and Habitat Conservation	66.67	47.62	52.38	23.81
Retrofit or Adopt Environment-Friendly Technologies	71.43	52.38	47.62	14.29
Sewerage System and Septage Management	85.71	61.90	57.14	9.52
Solid Waste Management Facilities	80.95	71.43	66.67	4.76
Sustainable Energy (e.g., Smart Hotels and Venues, Solar-Powered Facilities)	57.14	42.86	47.62	38.10
Sustainable Food Value Chain (e.g., Food Waste Monitoring and Reduction in Kitchens)	42.86	33.33	38.10	52.38
Sustainable Tourism (i.e., geohazard maps, climate change resilience)	61.90	38.10	42.86	33.33
Water Supply and Sanitation System	76.19	57.14	57.14	14.29
Natural and Cultural Environmental Planning	71.43	42.86	52.38	23.81

Note. Multiple responses were allowed.

4.6 Learning and Development

Table 81 presents how much of the participating tourism enterprises' payroll expenditures are utilized for learning and development (L&D) programs either by external providers or by the tourism companies/enterprises themselves. It can be seen that for hotel accommodations, most of them specifically 50%, allocates 10 to 50% of their payroll expenditures to L&D programs developed and provided by the company. While for Mabuhay accommodation, under the same type of L&D programs, allocations were equally distributed to less than 10% and 10 to 50% of their payroll expenditure along with those that have no allocations for in-company L&D.

In-company L&D programs for the recreation activities sector, at least for the enterprise observed, have a payroll expenditure allocation of 10-50%. Participating tangible cultural

services enterprises on the other hand, mostly (36.36%) allocates more than 50% of their payroll expenditure for the said programs.

As for the learning and development programs provided by external providers (either public or private in nature), it can be observed that for hotels under accommodation, most of the enterprises allocates 10 to 50% of their payroll expenditure similar to their responses to in-company L&D programs only higher this time at 66.67%. However for enterprises under mabuhay accommodation, although allocations are still equally distributed to less than 10% and 10 to 50%, it can be seen that for this type of L&D program, unlike the responses for in-company L&D, there are no responses for 'None' seeing as allocations of more than 50% of the payroll expenditure is now included with 33.33% of the responses.

According to the interviewed enterprise under Mabuhay accommodation, although they don't have the resources to provide their own learning and development programs, they see to it that they actively participate in L&D developed by external providers, especially those that are required and have no charge.

For the enterprise under the recreational activities industry, 10 to 50% of payroll expenditures are allocated to this type of L&D program similar to the earlier type (in-company) while for the tangible cultural activities industry, responses are equally distributed to more than 50%, less than 10% and no allocations.

Generally, a large proportion of the tourism enterprises allocate more than 10% of their payroll expenditures to L&D programs, whether conducted in-company or through external providers. The industry's high regard for training and skill development is also reflected in their treatment towards employees particularly for those with potential to perform more demanding duties (Table 58). As the Department of Tourism highlighted, for the sector, the quality of the workforce is one of the measures of success particularly as tourists also acquire the experience from the people in the industry.

Table 81.
Distribution of Payroll Expenditure Allocated for Learning and Development Programs Developed and Conducted by Various Providers by Industry

Learning and Development Programs Provider	Tourism Industry	Payroll Expenditure (%)				Total
		None	< 10%	10-50	> 50%	
In-company	Accommodation					
	• Hotel	0.00	16.67	50.00	33.33	100.00
	• Mabuhay Accommodation	33.33	33.33	33.33	0.00	100.00
	Recreation Activities (Sun and Beach)	0.00	0.00	100.00	0.00	100.00
	Tangible Cultural Services (Museum)	27.27	27.27	9.09	36.36	100.00
External providers (public and private training providers)	Accommodation					
	• Hotel	0.00	33.33	66.67	0.00	100.00
	• Mabuhay	0.00	33.33	33.33	33.33	100.00

Accommodation					
Recreation Activities (Sun and Beach)	0.00	0.00	100.00	0.00	100.00
Tangible Cultural Services (Museum)	27.27	27.27	18.18	27.27	100.00

To establish the connection between payroll expenditure allocations for learning and development programs with the enterprise size, table 82 is created below. It can be observed that for micro enterprises (in terms of employee size), most of them responded that there is no allocation for learning and development programs developed and provided by the company themselves (44.44%) However when we take a look on the responses of the same enterprise size (micro) and their payroll expenditure allocation to L&D programs provided by external entities, it can be seen that although there is still a percentage that has no allocation, the same percentage (33.33%) of responses is showing that a 10 to 50% of allocation is existing.

Still in terms of employee size, it can also be noticed that for small- and medium-sized enterprises, allocations for both external and in-company L&D programs are at less than 10% and 10 to 50%. Meanwhile, large-scale enterprises responded that they allocate more than 50% of their payroll expenditure to in-company L&D programs (80%) while for L&D programs developed by external providers their allocations are mostly on 10 to 50% and more than 50%.

Looking at the responses in terms of asset size, half (50%) of the micro enterprises have an allocation of 10 to 50% of payroll expenditures to L&D programs provided by their company while the other half has no allocation. For L&D programs provided by external providers, micro enterprises mostly responded with the same number (50%) when it came to allocation of 10 to 50%. Similar to the observation earlier, small- and medium-sized enterprises in terms of asset size, are seen to have their allocations mostly distributed at less than 10% and 10 to 50% of their payroll expenditure both for external and in-company provided L&D programs. For large enterprises, responses for in-company L&D programs are mostly (66.67) distributed at more than 50% of payroll expenditure allocation while allocation for external L&D programs decreased to 10 to 50%.

Looking at the responses under those that have no payroll expenditures allocated for learning and development programs ('None') either by the company or an external provider, it can be seen that micro- and small-scale enterprises among other enterprise sizes have existing values all throughout, much larger when it comes to in-company L&D development programs. This can be explained by MSMEs' capacity to allocate resources, especially financial in nature. Due to the tourism sector's seasonality of operations, the amount of revenue also comes in terms of season. These enterprises, especially micro and small, face serious constraints in financing and offering extensive training and development opportunities to their employees. What happens as a result of this is that on-the-job training becomes ad-hoc and delivered informally, wherein mentors train new employees who themselves "learnt by doing" or were given unstructured training (Stacey, 2015, 64). For small-sized enterprises, such an informal training is most of the time, the only and most

cost-effective option (Garofano et al., 2017, 68) while larger-sized enterprises usually have the budget for such programs.

Such observation was testified by the interviewed enterprise from Mabuhay accommodation (categorized as micro to small in size) wherein they stated that unlike larger-sized accommodation, the earnings from their operations barely covers their day-to-day needs as well as the enterprise's expenses. These enterprise sizes cannot typically afford to allot the necessary budget for other business-related developments such as learning and development programs. However, as mentioned earlier, if there are training programs and seminars offered by government agencies, especially those that require compliance or attendance, they actively participate. Being a member also of an association helps them to be well-informed about the news and updates in their industry especially when it comes to government policies and recent ordinances as well as information about training and seminars available.

Table 82.
Distribution of Payroll Expenditure Allocated for Learning and Development Programs Conducted by Various Providers, by Enterprise Size

Learning and Development Programs Provider	Enterprise Size	Payroll Expenditure (%)				Total		
		None	< 10%	10-50	> 50%			
In-company	Employee Size	Micro	44.44	22.22	22.22	11.11	100.00	
		Small	0.00	40.00	40.00	20.00	100.00	
		Medium	0.00	50.00	50.00	0.00	100.00	
		Large	0.00	0.00	20.00	80.00	100.00	
	Asset Size	Micro	50.00	0.00	50.00	0.00	100.00	
		Small	22.22	44.44	11.11	22.22	100.00	
		Medium	0.00	50.00	50.00	0.00	100.00	
		Large	0.00	0.00	33.33	66.67	100.00	
	External providers (public and private training providers)	Employee Size	Micro	33.33	22.22	33.33	11.11	100.00
			Small	0.00	40.00	40.00	20.00	100.00
			Medium	0.00	50.00	50.00	0.00	100.00
			Large	0.00	20.00	40.00	40.00	100.00
Asset Size		Micro	25.00	0.00	50.00	25.00	100.00	
		Small	22.22	44.44	22.22	11.11	100.00	
		Medium	0.00	50.00	50.00	0.00	100.00	
		Large	0.00	16.67	50.00	33.33	100.00	

To have a clearer vision with regards to the learning and development efforts of the observed tourism enterprises, various statements related to L&D were presented and can be referred to below (Table 83). Majority (47.62%) of the enterprises observed agree that they provide in-house learning and training programs, upon closer look, at Table 84, such statement is true for hotel accommodation, mabuhay accommodation, and enterprises under tangible cultural services, however we should take note that such statement is not applicable to some enterprises under mabuhay accommodation since a

percentage responded with strongly disagree (33.33%). For the recreational activities industry, the enterprise strongly agrees with the statement.

As for the second statement regarding their support of learning and training programs conducted by providers either private or public in nature, most of the surveyed respondents strongly agree (61.90%). Such response is true for all the types of tourism industries observed (accommodation-hotel and mabuhay, recreational activities, and tangible cultural services industry) wherein most are concentrated on ‘Strongly Agree.’

The third statement follows the enterprises’ support and provision of learning and training programs but only those that are required by the job, as seen below, most of the enterprises (52.38%) agree with the statement. This can be seen as true to the accommodation industry (hotels and mabuhay) as well as the tangible cultural services industry. The enterprise under the recreational activities on other hand, disagrees with the statement.

Most of the surveyed tourism enterprises also agree that their employees have a say in their own learning and training needs as well as their their L&D programs covering future skills needs (38.10 and 47.62 respectively), it can be seen that such is true to mabuhay accommodations, recreation activities and tangible cultural services while hotel accommodations’ responses were divided to neutral and strongly agree (fourth statement). Recreation activities, hotel and mabuhay accommodations correspond to this agreement with the fifth statement while tangible cultural services strongly agree.

Lastly, tourism enterprises mostly (33.33%) agree and are neutral to their learning and training programs covering STEM skills and competencies. It can be said that such is true for mabuhay accommodation and tangible cultural services but for hotels and recreation activities, their responses are mostly on ‘agree’ and ‘strongly disagree’ (50% and 100% respectively).

Table 83.
Distribution of Tourism Enterprises by Rating Various Statements related to Learning and Development

Statement	Rating Scale (%)					Total
	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	
We provide in-house learning and training programs.	4.76	0.00	4.76	47.62	42.86	100.00
We support learning and training programs conducted by private and public training providers.	0.00	0.00	0.00	38.10	61.90	100.00

We only provide or support learning and training programs that are required by the job (includes both in-house and external programs).	0.00	14.29	14.29	52.38	19.05	100.00
Employees have a say in their own learning and training needs.	0.00	4.76	28.57	38.10	28.57	100.00
Our learning and training programs cover future skills needs.	0.00	4.76	9.52	47.62	38.10	100.00
Our learning and training programs specifically cover STEM skills and competencies.	0.00	14.29	33.33	33.33	19.05	100.00

Table 84

Distribution of Tourism Enterprises by Rating Various Statements related to Learning and Development by Industry

Statements	Tourism Industry	Rating Scale (%)					Total
		Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	
We provide in-house learning and training programs.	Accommodation						
	• Hotel	0.00	0.00	0.00	50.00	50.00	100.00
	• Mabuhay Accommodation	33.33	0.00	0.00	33.33	33.33	100.00
	Recreation Activities (Sun and Beach)	0.00	0.00	0.00	0.00	100.00	100.00
	Tangible Cultural Services (Museum)	0.00	0.00	9.09	54.55	36.36	100.00
We support learning and training programs conducted by private and public training providers.	Accommodation						
	• Hotel	0.00	0.00	0.00	33.33	66.67	100.00
	• Mabuhay Accommodation	0.00	0.00	0.00	33.33	66.67	100.00
	Recreation Activities (Sun and Beach)	0.00	0.00	0.00	0.00	100.00	100.00
	Tangible Cultural Services (Museum)	0.00	0.00	0.00	45.45	54.55	100.00
We only provide or support learning and training programs	Accommodation						
	• Hotel	0.00	16.67	50.00	33.33	0.00	100.00
	• Mabuhay Accommodation	0.00	0.00	0.00	33.33	66.67	100.00

that are required by the job (includes both in-house and external programs).	Recreation Activities (Sun and Beach)	0.00	100.00	0.00	0.00	0.00	100.00
	Tangible Cultural Services (Museum)	0.00	9.09	0.00	72.73	18.18	100.00
Employees have a say in their own learning and training needs.	Accommodation						
	• Hotel	0.00	0.00	50.00	0.00	50.00	100.00
	• Mabuhay Accommodation	0.00	0.00	33.33	66.67	0.00	100.00
	Recreation Activities (Sun and Beach)	0.00	0.00	0.00	100.00	0.00	100.00
Our learning and training programs cover future skills needs.	Tangible Cultural Services (Museum)	0.00	9.09	18.18	45.45	27.27	100.00
	Accommodation						
	• Hotel	0.00	0.00	0.00	50.00	50.00	100.00
	• Mabuhay Accommodation	0.00	0.00	33.33	66.67	0.00	100.00
Our learning and training programs specifically cover STEM skills and competencies	Recreation Activities (Sun and Beach)	0.00	0.00	0.00	100.00	0.00	100.00
	Tangible Cultural Services (Museum)	0.00	9.09	9.09	36.36	45.45	100.00
	Accommodation						
	• Hotel	0.00	0.00	33.33	16.67	50.00	100.00
	• Mabuhay Accommodation	0.00	33.33	33.33	33.33	0.00	100.00
	Recreation Activities (Sun and Beach)	0.00	0.00	0.00	100.00	0.00	100.00
	Tangible Cultural Services (Museum)	0.00	18.18	36.36	36.36	9.09	100.00

Looking at the responses for the same statements but this time in terms of asset size, for micro-sized enterprises although there are still quite high percentages for 'agree' and 'strongly agree' (50 to 75%), a noticeable distribution (25 and 50%) of tourism enterprises responded with 'strongly disagree' and 'disagree.' 25% strongly disagreed that they provide in-house learning and training programs, 25% disagreed that their employees have a say in their own learning and training needs, and 25% also disagreed that their learning and training programs cover future skills needs.

In contrast to the distribution of micro enterprises, most of the responses from small-sized enterprises are concentrated in agreeing to the statements (1 to 5). Most of the responses for medium-sized enterprises are also distributed to 'Agree' and 'Strongly Disagree' (50 to 100%), the same goes for large-scale enterprises (33.33 to 83.33%).

Responses for the third statement (we only provide or support learning and training programs that are required by the job, both in-house and external programs) ranges from 'Neutral' (medium- with 50% and large-scale enterprises with 33.33%) to 'Agree' (micro- with 50% and small-sized enterprises with 77.78%)

Observing the responses for the sixth statement (our learning and training programs specifically cover STEM skills and competencies), it can be seen that only large-scale enterprises have the most distribution for 'Agree' (66.67%), small-sized enterprises mostly responded with 'Neutral' at 55.56% while micro- and medium-sized enterprises both has the highest percentage on 'Disagree' at 50%

Table 85.
Distribution of Tourism Enterprises by Rating Various Statements related to Learning and Development by Asset Size

Asset Size	Statement	Rating Scale (%)					Total
		Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	
Micro	We provide in-house learning and training programs.	25.00	0.00	0.00	75.00	0.00	100.00
	We support learning and training programs conducted by private and public training providers.	0.00	0.00	0.00	50.00	50.00	100.00
	We only provide or support learning and training programs that are required by the job (includes both in-house and external programs).	0.00	25.00	0.00	50.00	25.00	100.00
	Employees have a say in their own learning and training needs.	0.00	25.00	50.00	25.00	0.00	100.00
	Our learning and training programs cover future skills needs.	0.00	25.00	0.00	75.00	0.00	100.00
	Our learning and training programs specifically cover STEM skills and competencies.	0.00	50.00	25.00	0.00	25.00	100.00
	Small	We provide in-house learning and training programs.	0.00	0.00	11.11	66.67	22.22
	We support learning and training programs conducted by private and public training providers.	0.00	0.00	0.00	55.56	44.44	100.00
	We only provide or support learning and training programs that are required by the job (includes both in-house and external programs).	0.00	11.11	0.00	77.78	11.11	100.00

	Employees have a say in their own learning and training needs.	0.00	0.00	33.33	55.56	11.11	100.00
	Our learning and training programs cover future skills needs.	0.00	0.00	22.22	55.56	22.22	100.00
	Our learning and training programs specifically cover STEM skills and competencies.	0.00	0.00	55.56	33.33	11.11	100.00
Medium	We provide in-house learning and training programs.	0.00	0.00	0.00	0.00	100.00	100.00
	We support learning and training programs conducted by private and public training providers.	0.00	0.00	0.00	0.00	100.00	100.00
	We only provide or support learning and training programs that are required by the job (includes both in-house and external programs).	0.00	0.00	50.00	50.00	0.00	100.00
	Employees have a say in their own learning and training needs.	0.00	0.00	0.00	50.00	50.00	100.00
	Our learning and training programs cover future skills needs.	0.00	0.00	0.00	0.00	100.00	100.00
	Our learning and training programs specifically cover STEM skills and competencies.	0.00	50.00	0.00	0.00	50.00	100.00
Large	We provide in-house learning and training programs.	0.00	0.00	0.00	16.67	83.33	100.00
	We support learning and training programs conducted by private and public training providers.	0.00	0.00	0.00	16.67	83.33	100.00
	We only provide or support learning and training programs that are required by the job (includes both in-house and external programs).	0.00	16.67	33.33	16.67	33.33	100.00
	Employees have a say in their own learning and training needs.	0.00	0.00	16.67	16.67	66.67	100.00
	Our learning and training programs cover future skills needs.	0.00	0.00	0.00	33.33	66.67	100.00
	Our learning and training programs specifically cover STEM skills and competencies.	0.00	0.00	16.67	66.67	16.67	100.00

4.7 Work and Employment Practice

Table 86 illustrates how many of the participating tourism enterprises have existing policies with regard to different business documents. By definition, a business plan is a document that details the strategies and plans of a business on how to attain its goals, and as seen below, 47.62% of the respondents cover such a plan. A training plan, on the other hand, is a document that identifies the training programs that the employees need to complete for a specific period of time. Correspondingly, a training budget is the financial aspect of the training plan to carry out the training programs in the training plan, both of these documents, as can be referred to below, are covered by 71.43% of the respondents.

The staff development policy or plan obtained the highest percentage, wherein over 90.48% of the respondents covered such a document. The staff development plan is a document that details plan(s) on improving on increasing capabilities of staff through access to education and training opportunities in the workplace, through outside organizations, or through watching others perform the job. This is consistent with the findings on their payroll allocations for learning and development programs. The document with the lowest percentage was however received by the development for high potential staff at 42.86%.

Table 86.
Percentage of Tourism Enterprises with Policies Covering Various Documents

Documents	%
Business Plan	47.62
Training Plan	71.43
Training Budget	71.43
Staff Development Policy/Plan	90.48
Development for High Potential Staff	42.86

Note: Multiple responses were allowed.

As seen below in Table 87, all of the tourism enterprises covered have policies covering the five different business documents. For the accommodations industry, specifically for hotel accommodation, almost all of the respondents can be observed having these documents signified by the high percentages, especially the staff development policy/plan wherein all of the respondents responded positively. The same goes for Mabuhay accommodation although development for high potential staff and staff development policy/plan, unlike in hotel accommodation, is quite lower compared to the other documents (33.33%).

For the respondent under the recreation activities, they seem to also cover these documents in their policies since percentages are all at 100%. Lastly, for the tangible cultural services, although the training plan, training budget, and staff development policy/plan are covered by most of the respondents under their policies, the low percentage from the business plan and development for high potential staff indicates that not all enterprises are currently covering such documents.

Table 87.
Percentage of Tourism Enterprises with Policies Covering Various Documents by Industry

Tourism Industry	Document (%)				
	Business Plan	Training Plan	Training Budget	Staff Development Policy/Plan	Development for High Potential Staff
Accommodation					
• Hotel	66.67	66.67	66.67	100.00	83.33
• Mabuhay Accommodation	66.67	66.67	66.67	33.33	33.33
Recreation Activities (Sun and Beach)	100.00	100.00	100.00	100.00	100.00
Tangible Cultural Services (Museum)	27.27	72.73	72.73	100.00	18.18

Looking at the coverage of these documents under the policies of tourism enterprises by asset size, it is quite noticeable that while four of the documents are covered by micro enterprises (business plan, training plan, training budget, and staff development policy/plan), development for high potential staff seems to be inexistent (0%).

Above half of the small-sized enterprises can be seen covering the training plan, training budget, and staff development policy/plan while less than half (44.44%) responded positively to business plan and development for high potential staff. Four of five documents are covered by half of the respondents under the medium-sized enterprises, staff development policy/plan, on the other hand is at 100%. As for the large enterprises, the second to fourth of the documents are all covered by the respondents while the other two at 50 and 66.67% respectively.

Table 88.
Percentage of Tourism Enterprises with Policies Covering Various Documents by Asset Size

Asset Size	Document (%)				
	Business Plan	Training Plan	Training Budget	Staff Development Policy/Plan	Development for High Potential Staff
Micro	50.00	75.00	50.00	75.00	0.00

Small	44.44	55.56	66.67	88.89	44.44
Medium	50.00	50.00	50.00	100.00	50.00
Large	50.00	100.00	100.00	100.00	66.67

Note. Multiple responses were allowed.

Table 89 presents how much of the observed tourism enterprises cover the different rewards and opportunities under their respective organizational policies. The 47.62% of the respondents cover individual performance-related pay, 52.38% have policies regarding opportunities for job rotation at other locations, while 61.90% on the other hand, offer opportunities for internal promotion as well as overtime pay. Most of the respondents, specifically 76.19% cover bonuses based on overall organizational performance as well as non-pay benefits since some of these are mandated (e.g. health insurance) while the least percentage can be seen on share options for employees (28.57%) which is plausible because these types of benefits are not that familiar in the country given also its risky and complicated concept that most employees cannot easily understand, share options were then followed by other benefits not presented in the survey options (15%). Although the specific policies listed under “others” may likewise be classified under non-pay benefits.

Table 89.
Percentage of Tourism Enterprises with Policies Covering Various Rewards and Opportunities

Rewards or Opportunities	%
Individual performance-related pay	47.62
Bonuses based on overall organizational performance	76.19
Share options for employees	28.57
Eligible for internal promotion	61.90
Non-pay benefits (such as child-care, health insurance, travel allowance, study leave, food subsidies etc.)	76.19
Opportunities for job rotation at other locations (including overseas)	52.38
Overtime pay	61.90
Others	
- Awards and recognitions	15.00
- Benefits from the employee’s organization	
- Compensatory time-off	

To know the percentage of full-time employees per industry eligible for the rewards and opportunities presented in the previous table, a table below (Table 90) was created. As observed, most if not all of the full-time employees from hotel accommodation (90%), recreational activities (100%), and tangible cultural services industries (100%) are entitled to individual performance-related pay except for the employees under Mabuhay accommodation which can be explained due to the small nature of its operations resulting also to revenue just enough to cover employee wages. Full-time employees in this industry (Mabuhay) are also not entitled to bonuses based on overall organizational

performance and share options as signified by the zero percentage. It can also be seen that the enterprise under recreational activities does not offer share options to its full-time employees.

For the succeeding rewards and opportunities (eligible for internal promotion to overtime pay), most of the full-time employees under each tourism industry, especially hotel accommodation, recreational activities, and tangible cultural services are entitled. Although some enterprises under Mabuhay accommodation now offer these rewards to its full-time employees, it is noticeable that the industry still has the lowest percentages except for overtime pay wherein all of its employees are entitled to.

Other benefits to which 15% of the tourism enterprises responded as seen in the table earlier (Table 89) were obtained by identifying those who provided specific and additional rewards and opportunities not included in the questionnaire, after the processing of data, three responses were obtained. One was from recreational activities in which an enterprise added 'awards and recognitions' entitled to all (100%) of their full-time employees, the other one was from a tangible cultural services enterprise or museum in which 'compensatory time-off' is offered to all its full-time employees (100%), the last one was also from the tangible cultural services industry: 'benefits from employee's organization' in which the respondent gave an 'NA or not applicable' response when it comes to the percentage of full-time employees entitled to such a reward. Due to this, for the computation of the 15% for 'Others' in the previous table, instead of the initial 21 respondents, only 20 respondents were utilized since no percentage was given by the tangible cultural services enterprise.

Table 90.
Percentage of Full-Time Employees in Tourism Enterprises Entitled to Various Rewards or Opportunities by Industry

Rewards or Opportunities	Tourism Industry (%)			
	Accommodation		Recreational	Tangible
	Hotel	Mabuhay Accommodation	Activities (Sun and Beach)	Cultural Services (Museum)
Individual performance-related pay	90.00	0.00	100.00	100.00
Bonuses based on overall organizational performance	84.00	0.00	100.00	84.33
Share options for employees	83.33	0.00	0.00	100.00
Eligible for internal promotion	100.00	50.00	100.00	80.00
Non-pay benefits (such as child-care, health insurance, travel allowance, study leave, food subsidies etc.)	100.00	60.00	100.00	91.98
Opportunities for job rotation at other locations (including	100.00	50.00	100.00	90.00

overseas)				
Overtime pay	95.00	100.00	100.00	76.25

Similar to the previous tables, table 91 illustrates the percentage of full-time employees entitled to the same rewards and opportunities but this time, categorized by the enterprise size in terms of employee and asset size. As seen below, individual performance related pay is enjoyed and offered to all employees of micro to medium-sized enterprises may it be in terms of asset or employee size, percentages for large enterprises although not 100% is still quite high at over 80%. Bonuses based on overall organizational performance are also entitled to high percentages of full-time employees in all enterprise sizes with responses ranging from 70 to 100%. For share options, most of the tourism enterprise sizes offer this type of reward to almost all of their full-time employees (75 to 100%) except for medium-sized enterprises in terms of employee size wherein none (0%) of the full-time employees are entitled.

The third reward or opportunity (eligible for internal promotion) is also given to almost all of the full-time employees under each enterprise size with medium-sized (in terms of asset and employee size) obtaining the lowest at 65%. High percentages of full-time employees can also be seen for the fifth and sixth reward for every enterprise size while the last reward (overtime pay) most of the percentages are also high (90-100%) with exception again for the medium-sized enterprises (employee and asset size) wherein percentage of 62.50% was obtained, quite a low value compared to other enterprise sizes.

Table 91.
Percentage of Full-Time Employees in Tourism Enterprises Entitled to Various Rewards or Opportunities by Enterprise Size

Rewards or Opportunities	Enterprise Size (%)							
	Employee Size				Asset Size			
	Micro	Small	Medium	Large	Micro	Small	Medium	Large
Individual performance-related pay	100.00	100.00	100.00	83.33	100.00	100.00	100.00	87.50
Bonuses based on overall organizational performance	93.75	77.78	100.00	70.00	100.00	83.33	100.00	76.00
Share options for employees	87.50	100.00	0.00	100.00	75.00	100.00	100.00	100.00
Eligible for internal promotion	91.67	83.33	65.00	100.00	100.00	83.33	65.00	100.00
Non-pay benefits (such as child-care, health insurance, travel allowance, study leave, food subsidies etc.)	100.00	69.56	100.00	100.00	100.00	78.26	100.00	100.00

Opportunities for job rotation at other locations (including overseas)	100.00	75.00	75.00	100.00	100.00	87.50	75.00	100.00
Overtime pay	95.00	100.00	62.50	90.00	100.00	96.67	62.50	92.50

Data regarding how much of the various organizational information are being shared to in-house or permanent employees can be referred to in Table 100. And as seen below, most (57.14%) of the tourism enterprises observed in this study share financial information only with some of their employees while 38.10% share it with all employees. A small percentage of enterprises (4.76%), on the other hand, do not generally share such information. When it comes to business plans, although almost evenly distributed, a higher proportion of tourism enterprises share this information with all employees (52.38%) while the rest only share it with some employees.

Information regarding operational challenges are also mostly shared with all employees (76.19%). As for the market analysis, a higher percentage of tourism enterprises (57.14%) responded that they only share this information with some employees while the remaining percentage (42.86%) share their market analysis with all employees.

Table 100.
Distribution of Tourism Industries by Extent of Sharing Various Information

Information	Extent of Sharing (%)			Total
	Not generally shared	Only with some employees e.g. management only	Shared with all employees	
Financial Information	4.76	57.14	38.10	100.00
Business Plans	0.00	47.62	52.38	100.00
Operational Challenges	0.00	23.81	76.19	100.00
Market Analysis	0.00	57.14	42.86	100.00

Looking at the extent of sharing from a more specific perspective—in terms of employee size, most of the participating micro-enterprises as observed below (Table 101), share four out of four information (financial information, business plans, operational challenges, and market analysis) to all of their employees (66.67, 66.67, 77.78, and 55.56 respectively).

Most of the small-sized enterprises on the other hand, only share financial information, business plans, and market analysis to some of their employees (80%, 100%, and 80%) while for operational challenges, most, specifically 80% share it with all their employees. Noticeably, 20% of small enterprises also responded that they don't generally share their financial information with their employees.

When it comes to the responses of medium-sized enterprises, it can be seen that all of them (100%) share their business plans and operational challenges with all of their employees, financial information is shared only to some employees (100%), and for market analysis, half (50%) responded that it is shared only to some employees while the other half share it will all their employees.

As for the large enterprises, most of the respondents answered that their financial information and market analysis are shared only to some of their employees (60%), business plans and operational challenges, however, are shared with all employees according to most of the respondents, similar to medium enterprises (60%).

The table shows that smaller tourism enterprises, particularly micro and small businesses, tend to share financial and operational information more selectively, often limiting access to management or specific employees. In contrast, larger enterprises exhibit a higher tendency to share business-related information more widely across all employees, reflecting a more transparent and structured approach to information dissemination. This trend suggests that as company size increases, so does the level of openness and structured communication, likely due to more complex organizational needs and governance structures.

Table 101.

Distribution of Tourism Industries by Extent of Sharing Various Information by Employee Size

Employee Size	Information	Extent of Sharing (%)			Total
		Not generally shared	Only with some employees e.g. management only	Shared with all employees	
Micro	Financial Information	0.00	33.33	66.67	100.00
	Business Plans	0.00	33.33	66.67	100.00
	Operational Challenges	0.00	22.22	77.78	100.00
	Market Analysis	0.00	44.44	55.56	100.00
Small	Financial Information	20.00	80.00	0.00	100.00
	Business Plans	0.00	100.00	0.00	100.00
	Operational Challenges	0.00	20.00	80.00	100.00
	Market Analysis	0.00	80.00	20.00	100.00
Medium	Financial Information	0.00	100.00	0.00	100.00
	Business Plans	0.00	0.00	100.00	100.00
	Operational Challenges	0.00	0.00	100.00	100.00
	Market Analysis	0.00	50.00	50.00	100.00

Large	Financial Information	0.00	60.00	40.00	100.00
	Business Plans	0.00	40.00	60.00	100.00
	Operational Challenges	0.00	40.00	60.00	100.00
	Market Analysis	0.00	60.00	40.00	100.00

4.8 Business Strategy

Table 102 shows the different business approaches in the form of various statements as seen below and how the different tourism enterprises (categorized by asset size) align themselves with these approaches and statements through ratings.

The first statement wanted to know if there are more-than-average amount of customization in the participating enterprises' products and services compared to other tourism enterprises. Most of the micro-sized enterprises agreed with the statement (50%), while small-sized enterprises mostly responded with 'Neutral' (55.56%). Most of the medium- and large-scale enterprises on the other hand, both responded with 'strongly agree' with 100 and 50% respectively.

In comparison again to other tourism enterprises, the second statement looks into the competitive success of the enterprises' products and services, specifically if it is dependent on price in most cases. Micro enterprises agreed with the statement (75%), small-sized enterprises responded with 'Neutral' and 'Agree' both at 44.44%, half (50%) of the responses from medium enterprises were neutral to the statement while the other 50% disagreed. Responses from large enterprises were evenly distributed to those that are neutral, those who agreed, and strongly agreed (33.33%).

The third statement determines which of the tourism enterprises mostly compete in a market of premium quality products and services. For most micro enterprises, being in such a market is true as 75% agreed. For small enterprises, most of the responses are from those that are neutral and those that agreed (both at 33.33%). Half of the medium-sized enterprises agree while the other half strongly agree, while most of the large-scale enterprises (66.67%) also strongly agree.

The last statement discovers if their products and services rely on the development of unique or innovative products and services. As for most of the micro and small-scale enterprises, such a condition is true as signified by the high percentage of 'Agree' responses at 75 and 55.56%, respectively. Half (50%) of the responses from medium-sized enterprises are neutral, while the other half strongly agree. Most of the respondents from large-sized enterprises also strongly agree with such a statement (50%).

It can also be noticed that no enterprise responded with 'Strongly Agree' in any of the statements and while 'Disagree' responses are seen from micro and small-sized enterprises, a small to no percentage can be seen from medium to large enterprises.

Table 102.

Distribution of Tourism Enterprises by Rating Various Approaches to Business by Asset Size

Asset Size	Approach to Business	Rating Scale (%)					Total
		Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	
Micro	Compared to other enterprises in the tourism sector, there is a 'more-than-average' amount of customization in our products and services	0.00	25.00	25.00	50.00	0.00	100.00
	Compared to other other enterprises in the tourism sector the competitive success of our products and services is dependent on price in the vast majority of cases	0.00	25.00	0.00	75.00	0.00	100.00
	Our business mostly competes in a market of premium quality products or services	0.00	0.00	25.00	75.00	0.00	100.00
	Our products and services rely on developing unique or innovative products or services	0.00	0.00	25.00	75.00	0.00	100.00
Small	Compared to other enterprises in the tourism sector, there is a 'more-than-average' amount of customization in our products and services	0.00	11.11	55.56	33.33	0.00	100.00
	Compared to other other enterprises in the tourism sector the competitive success of our products and services is dependent on price in the vast majority of cases	0.00	11.11	44.44	44.44	0.00	100.00
	Our business mostly competes in a market	0.00	22.22	33.33	33.33	11.11	100.00

	of premium quality products or services Our products and services rely on developing unique or innovative products or services	0.00	0.00	33.33	55.56	11.11	100.00
Medium	Compared to other enterprises in the tourism sector, there is a 'more-than-average' amount of customization in our products and services	0.00	0.00	0.00	0.00	100.00	100.00
	Compared to other other enterprises in the tourism sector the competitive success of our products and services is dependent on price in the vast majority of cases	0.00	50.00	50.00	0.00	0.00	100.00
	Our business mostly competes in a market of premium quality products or services	0.00	0.00	0.00	50.00	50.00	100.00
	Our products and services rely on developing unique or innovative products or services	0.00	0.00	50.00	0.00	50.00	100.00
Large	Compared to other enterprises in the tourism sector, there is a 'more-than-average' amount of customization in our products and services	0.00	0.00	33.33	16.67	50.00	100.00
	Compared to other other enterprises in the tourism sector the competitive success of our products and services is dependent on price in the vast majority of cases	0.00	0.00	33.33	33.33	33.33	100.00

Our business mostly competes in a market of premium quality products or services	0.00	0.00	33.33	0.00	66.67	100.00
Our products and services rely on developing unique or innovative products or services	0.00	0.00	33.33	16.67	50.00	100.00

Table 103 demonstrates how far collaborations are between tourism enterprises and the academe as well as government education agencies when it comes to future skills supply. Looking at the responses by industry, for hotel accommodation, half (50%) of the enterprises answered that there are no actions so far but they are planning to act, while the other half had already created or changed some jobs as described. A large portion (66.67%) of mabuhay accommodations have no actions so far but they are already planning to implement such collaborations while noticeably, the remaining 33.33% have no actions so far and have no plan in the near future.

For the enterprise under recreational activities, they already have created or changed some jobs through these collaborations. Majority of the tangible cultural services (54.55%) also have developed and modified some jobs as described, some of these enterprises, specifically museums (36.36%) have yet to act but are in the process of planning, while the remaining 9.09% have not yet acted and at the same time, have no plans for such collaborations in the near future.

Table 103.

Distribution of Tourism Enterprises by Extent of Implementation on Collaborating with the Academe and the Government Education Agencies for Future Skills Supply by Industry

Tourism Industry	Extent of Implementation (%)			Total
	No action so far and no plan in the near future	No action so far but planning to act	Have created/changed some jobs as described	
Accommodation				
• Hotel	0.00	50.00	50.00	100.00
• Mabuhay Accommodation	33.33	66.67	0.00	100.00
Recreational Activities (Sun and Beach)	0.00	0.00	100.00	100.00
Tangible Cultural Services (Museum)	9.09	36.36	54.55	100.00

The table below (Table 104) investigates the expansion plans of the observed tourism enterprises in terms of other areas of development—ideally excluding development for employee skills and education. Half of the respondents under hotel accommodation (50%) have such plans while for mabuhay accommodation enterprises, only 33.33% are planning to expand such areas, accounting for the smallest percentage among the other tourism

industries. The tourism enterprise under recreational activities is also already planning to expand while less than half (45.45%) of the respondents under tangible cultural services have the same plans.

Table 104.

Percentage of Tourism Enterprises with Plans to Expand on Other Areas of Development by Industry

Tourism Industry	%
Accommodation	
• Hotel	50.00
• Mabuhay Accommodation	33.33
Recreational Activities (Sun and Beach)	100.00
Tangible Cultural Services (Museum)	45.45

In connection to the previous table, those participating enterprises (10 out of 21 enterprises) that have plans for expansion were also asked to specify these other areas of development. The identified areas of development may be categorized as follows:

1. Infrastructure and Facilities Development
 - Utilization of extra or unutilized space for future expansion
 - Development of a vacant lot
 - Construction plan for a specific and not yet utilized island
 - Development of the island into a picnic area
 - Expansion into a farm tourism site
 - Opening of other national museum branches
 - Establishment of laboratory facilities for conservation
2. Sustainability and Innovation
 - Sustainability projects
 - Digitalization
3. Human Resource and Skills Development
 - Development and enhancement of employee skills
4. Tourism and Economic Growth
 - Creation of additional jobs and guest activities

Table 105.

Areas of Development for Expansion by Industry

Tourism Industry	Identified Areas of Development
Accommodation	
• Hotel	Sustainability Projects Extra/Unutilized space at the back of the hotel for future expansion. Guest facilities
• Mabuhay Accommodation	Developing and enhancing employees skills

Recreational Activities (Sun and Beach)	Vacant lot for development Additional jobs and activities for guest Construction plan for Paca Island
Tangible Cultural Services (Museum)	Laboratory facilities for conservation Opening other national museum branches Facilities and employee's skill development Digitalization

4.9 Work Process and Technology

The assessment of core equipment utilized by the observed tourism enterprises, specifically how up-to-date these equipment are compared to the best commonly available technology, reveals significant insights. Table 106 offers a comprehensive breakdown of how the enterprises' core equipment aligns with the best commonly available technology, encompassing a range of tourism enterprises.

For the available technologies found and used by tourism enterprises within the country, among hotel accommodations, 33.33% of enterprises report being up to date, another 33.33% are 1-5 years behind, and also 33.33% are more than five years behind. For Mabuhay accommodations, a significant 66.67% find themselves 1-5 years behind, indicating potential technological gaps. Notably, the recreational activities sector stands out with all enterprises being up to date.

Contrasting local conditions with overseas counterparts reveals further nuances. In the hotel accommodations realm, 50% of enterprises perceive that they are more than five years behind overseas, and 33.33% lag 1-5 years behind, underscoring the need for technological catch-up. The picture shifts for Mabuhay accommodations overseas, with an equal distribution of 33.33% each for being up to date, 1-5 years behind, and more than five years behind. Similarly, the recreational activities industry, which has a reported full technology readiness for its local counterparts, now sees a shift toward being 1-5 years behind its overseas counterparts.

For the enterprise under the recreational activities industry, the technologies utilized consist of genset, walk-in chiller, freezer, air conditioning units, swimming pool filtration system, laundry washing machine and dryer, and a large ironing machine. They also have technological systems in place, hotel management system, point-of-sale system, telephone and CCTV equipment. This is why the enterprise's responses when it comes to equipment within the country are up-to-date.

Mabuhay accommodation industry respondents acknowledge their lag in technological advancements, aiming to digitize processes to become more technologically capable. A respondent noted that there is no foreseen problem with the plan to digitize the process and make the enterprise more technologically capable and gave examples and areas to digitize such as reservation, booking, and payment mechanisms.

During the consultation with the industry, the move to digital spaces and the utilization of digital platforms also comes with some challenges in terms of human resources. Although new jobs and skills may be needed such as graphic designers and video specialists, some jobs may not be completely obsolete, but the number of workers required for a particular position may be reduced. For instance, marketing/booking staff is an essential part of their organization until 2020. But, because of the pandemic and the closure of the establishment, they have not relied on the particular occupation as they could pursue their business without it. It was shared that with new technology, there is less need for a front office because channel managers automate the booking system. Work becomes more efficient.

Moreover, a respondent from the tangible cultural services industry expressed disparities compared to overseas facilities. They noted specific gaps in accessibility and security measures, highlighting the need for improvement and adaptation. For example, they now have tactile collections for visually impaired visitors which were based on technologies found abroad. They also admitted that they are behind when it comes to reservation systems, management of museum collections as well as security. As compared to the heightened security systems overseas wherein museums have motion sensors and laser detectors, Philippine museums struggle with just the management of CCTV operations, stating the need for a dedicated employee monitoring the equipment aside from the guards and other security personnel. In terms of current equipment, they stated that when it comes to collections conservation, they already have data loggers which automatically detect the museum's environment, locating where important collections are found making it easier for them to know how to take care of such collections. As for other technological advancements in the industry, both local and international, the respondent also expressed their readiness and willingness to adapt and acquire them if given the opportunity.

The distribution of technology readiness among enterprises offers valuable insights when cross-analyzed with the areas of development for expansion identified within various tourism industries provided in the previous table. In the hotel industry, where sustainability projects, expansion of unused space, and guest facility improvements are targeted, the technology distribution is fairly balanced locally. This suggests a mix of technological adoption levels, presenting opportunities for advancements in line with their development goals. Similarly, Mabuhay accommodations within the country are aiming to enhance employee skills, but the technology distribution is less even. This indicates a potential gap in technology readiness that aligns well with the need for skills development.

On the other hand, the sector of recreational activities focused on sun and beach experiences boasts 100% technology readiness. While their areas of development include expanding job opportunities, activities, and construction plans, their strong technological foundation sets them up well for these expansion efforts. Meanwhile, the tangible cultural services sector, such as museums, is keen on laboratory facilities, new branches, improved facilities and skills, and digitalization. Here, the local technology distribution is more varied. This mix suggests an avenue for technological modernization to align with their comprehensive development aspirations.

Table 106.

Distribution of the Tourism Enterprises by Core Equipment Condition as Compared with the Best Commonly Available Technology by Industry

Comparison	Tourism Industry	How up-to-date is the equipment (%)			
		Up to date	1 to 5 years behind	More than 5 years behind	Total
Within the Country	Accommodation				
	• Hotel	33.33	33.33	33.33	100.00
	• Mabuhay Accommodation	33.33	66.67	0.00	100.00
	Recreational Activities (Sun and Beach)	100.00	0.00	0.00	100.00
	Tangible Cultural Services (Museum)+	54.55	36.36	9.09	100.00
Overseas	Accommodation				
	• Hotel	16.67	33.33	50.00	100.00
	• Mabuhay Accommodation	33.33	33.33	33.33	100.00
	Recreational Activities (Sun and Beach)	0.00	100.00	0.00	100.00
	Tangible Cultural Services (Museum)	9.09	63.64	27.27	100.00

Tables 107 and 108 below now detail the equipment condition in terms of employee and asset sizes of the participating tourism enterprises. Upon analysis, it is evident that when comparing equipment conditions within the country, micro-sized enterprises, categorized by employee size (Table 107), predominantly find themselves falling behind by one (1) to five (5) years (55.56%). In contrast, a significant proportion of small-sized enterprises indicate being technologically up to date (40%), alongside another 40% acknowledging their technology lag of one (1) to five (5) years. Notably, all medium-sized enterprises confirm being technologically up to date. Interestingly, within the realm of large enterprises, a considerable 80% report their alignment with the latest technology, while the remaining 20% note a slight delay of one (1) to five (5) years.

When examining the equipment's status in comparison to those utilized overseas, micro-sized enterprises, still categorized by employee size, continue to showcase a prevalent trend of being one (1) to five (5) years behind, constituting 66.67% of responses. Conversely, the remaining 33.33% indicate a more extensive time lag of over five (5) years. Remarkably, no micro-sized enterprise reports to being up to date in this context. Turning to small-sized enterprises, a substantial 60% reveal a noticeable technology gap exceeding five years. However, a modest fraction (20%) is identified as being up to date. For medium-sized enterprises, a balanced distribution is observed, with 50% confirming technological alignment with the latest advancements, while the remaining 50% admit to trailing by one (1) to five (5) years. Lastly, within the domain of large-scale enterprises, concerning overseas equipment comparison, a notable 60% report being behind by one (1) to five (5) years. The remaining responses exhibit an equitable split between acknowledging being up-to-date (20%) and facing a more substantial delay of over five (5) years (20%).

Table 107.

Distribution of Tourism Enterprises by Core Equipment Condition as Compared with the Best Commonly Available Technology by Employee Size

Comparison	Employee Size	How up-to-date is the equipment (%)			
		Up to date	1 to 5 years behind	More than 5 years behind	Total
Within the Country	Micro	22.22	55.56	22.22	100.00
	Small	40.00	40.00	20.00	100.00
	Medium	100.00	0.00	0.00	100.00
	Large	80.00	20.00	0.00	100.00
Overseas	Micro	0.00	66.67	33.33	100.00
	Small	20.00	20.00	60.00	100.00
	Medium	50.00	50.00	0.00	100.00
	Large	20.00	60.00	20.00	100.00

In terms of asset size presented by Table 108 below, local micro-sized enterprises echo the trend observed in the previous table, with the majority concentrated on lagging one (1) to five (5) years behind, accounting for 50% of responses. Similarly, among small-sized enterprises, a significant proportion—55.56%—also find themselves trailing behind by one (1) to five (5) years. A notable divergence arises within medium-sized enterprises, where half (50%) affirm their alignment with current technology, while the remaining 50% acknowledge a delay of more than five (5) years. Meanwhile, local large enterprises stand out with a substantial 83.33% indicating technological currency, juxtaposed against the 16.67% reporting a shortfall of one (1) to five (5) years behind.

In comparison to these larger entities, both micro and small enterprises predominantly exhibit gaps—either spanning one to five years or more than five years—highlighting a prevalent challenge faced by Micro, Small, and Medium Enterprises (MSMEs). This challenge revolves around adapting to swiftly evolving market demands and technological shifts. Various factors tied to their smaller scale, encompassing limitations in financial resources, skilled labor, market access, market information, and notably, technology, contribute to this predicament.

Micro and small enterprises, especially, grapple with maintaining pace with available technologies and equipment, given their constrained resources. A micro-enterprise manager affirmed this sentiment, shedding light on their financial constraints. Most of their income is channeled toward immediate family needs, leaving minimal resources for business upkeep and technological updates. Consequently, they rationalize that if customers demand high-tech offerings, they would instinctively gravitate toward larger establishments capable of providing such services.

Moreover, when queried about their willingness to embrace new technologies potentially subsidized by the local government, these enterprises expressed reluctance due to the unfamiliarity of the owner and employees with advanced technology operations. Their reservations stem from concerns that a lack of tech-savviness could hinder their effective utilization of these technologies.

Evaluating the equipment employed by observed tourism enterprises on an international scale, notable disparities emerge. Among medium-sized enterprises, a considerable 50% boast current technology adoption, while the remaining half confront a time lag of more than five (5) years. However, both micro and large enterprises exhibit a different dynamic, with substantial proportions—75% and 66.67%, respectively—acknowledging a lag of one (1) to five (5) years. Small enterprises present a more balanced distribution, with 44.44% in each category: 'one (1) to five (5) years behind' and 'more than five (5) years behind'.

Table 108.

Distribution of Tourism Enterprises by Core Equipment Condition as Compared with the Best Commonly Available Technology by Asset Size

Comparison	Asset Size	How up-to-date is the equipment (%)			
		Up to date	1 to 5 years behind	More than 5 years behind	Total
Within the country	Micro	25.00	50.00	25.00	100.00
	Small	33.33	55.56	11.11	100.00
	Medium	50.00	0.00	50.00	100.00
	Large	83.33	16.67	0.00	100.00
Overseas	Micro	0.00	75.00	25.00	100.00
	Small	11.11	44.44	44.44	100.00
	Medium	50.00	0.00	50.00	100.00
	Large	16.67	66.67	16.67	100.00

4.10 Organizational Performance

Table 109 takes a look at the different business outcomes of the observed tourism enterprises from 2021 to 2022. For hotel accommodations, most of the enterprises responded that their profits as well as total revenue and sales have increased (50 and 66.67%). Thirty-three percent (33%), on the other hand, responded otherwise for both profits and total sales and revenue. In terms of market share, half of the respondents indicated that there was no change within the given year, 33.33% responded that it increased, while a small percentage of 16.67% incurred a decrease. The enterprise observed under recreational activities, on the other hand, experienced an increase in all three of the business outcomes below.

All of the enterprises in Mabuhay accommodation (100%) suffered a decrease in profits, total sales and revenues, as well as market share. This can be explained by the occurrence of the recent health crisis, due to the risks brought about by COVID-19, strict health protocols were implemented and with these, lockdowns and stay-at-home orders were given affecting travel and ultimately, the tourism sector. According to Asian Development Bank Institute (ADB), from among the MSMEs in the Philippines, a more serious impact was felt by microenterprises (Shinozaki & Rao, 2021, 21). And with the micro to small nature of Mabuhay accommodations as defined in the earlier sections, it is with no doubt that this industry was heavily affected by the pandemic. According to a Mabuhay accommodation enterprise interviewed for this study, due to the negative effects of COVID-19 to their

business especially in terms of financial performance, they were forced to downsize and lessen their manpower to 60 to 70% from the original 55-80 employees and have to also temporarily close in 2021. They recently reopened in January of 2022. Continuing their business operations after the pandemic, which was referred to as the recovery period, they are also now striving to cut costs in order to earn back their losses and keep up with the new normal.

Another respondent from Mabuhay accommodation also expressed how they were affected by the pandemic. After closing from 2020 to 2021, customers became lower in numbers than usual, and only 1-2 rooms are being accommodated on average. They also have to incur additional expenses due to the heightened and strict health protocols especially in terms of traveling and sanitation. Before reopening, they also had to secure accreditation from DOT. While the agency assisted in the processing and required no fees for the documents, expenses were still incurred. Aside from these, the enterprise also faces tight competition, being located in one of the major tourist destinations. The enterprise rarely becomes full since many accommodation facilities already exist within the area and with larger accommodation enterprises offering more high-quality services with affordable prices. Most customers sometimes prefer to avail them over smaller-sized accommodations.

Interestingly, most of the enterprises under tangible cultural services responded with 'Not Applicable', specifically 63.64% to all three outcomes. Eighteen point eighteen percent (18.18%) experienced no change in terms of profits while the other 18.18% experienced a decrease. When it comes to total sales/revenues and market share, 27.27% of tangible cultural services experienced no change, while the other 9.09% felt a decrease in both of these business outcomes. This non-applicability can be explained by the response given by one of the tangible cultural enterprises who responded that most of the museums (especially those included in this study as samples) usually surrender their earnings to the national museum. Most of them also opt not to charge entrance fees during these years (2021-2022) or as mentioned, 'recovery period' to drive or motivate people to visit the museum.

In addition, an enterprise interviewed under the tangible cultural services industry also felt the pandemic's impact. They were completely closed for the whole year of 2020. For 2021, they limited their opening and had to lay off some employees (usually those that were outsourced e.g. building attendants, security guards). Before officially reopening and during their recovery, they started to hire employees again and rehired those employees they have lost. Reservations are still implemented especially for large groups of visitors (15 individuals and above). They also have to do additional measures such as thorough disinfection, fogging, schedules areas for cleaning especially those areas with a higher volume of guests. These impacts may account for those industries under the tangible cultural services industry which experienced a decrease in their financial performance.

Table 109.
Distribution of Tourism Enterprises by Rating of Different Outcomes from 2021 to 2022, by Industry

Outcomes	Tourism Industry	Rating (%)				Total
		Decreased	No change	Increased	Not Applicable	

Profitability	Accommodation					
	• Hotel	33.33	16.67	50.00	0.00	100.00
	• Mabuhay					
	Accommodation	100.00	0.00	0.00	0.00	100.00
	Recreational Activities (Sun and Beach)	0.00	0.00	100.00	0.00	100.00
Total Sales/ Revenue	Tangible Cultural Services (Museum)	18.18	18.18	0.00	63.64	100.00
	Accommodation					
	• Hotel	33.33	0.00	66.67	0.00	100.00
	• Mabuhay					
	Accommodation	100.00	0.00	0.00	0.00	100.00
Market Share	Recreational Activities (Sun and Beach)	0.00	0.00	100.00	0.00	100.00
	Tangible Cultural Services (Museum)	9.09	27.27	0.00	63.64	100.00
	Accommodation					
	• Hotel	16.67	50.00	33.33	0.00	100.00
	• Mabuhay					
	Accommodation	100.00	0.00	0.00	0.00	100.00
	Recreational Activities (Sun and Beach)	0.00	0.00	100.00	0.00	100.00
	Tangible Cultural Services (Museum)	9.09	27.27	0.00	63.64	100.00

The findings from Tables 110 and 111 highlight similar trends in the financial performance of tourism enterprises when analyzed by employee size (Table 110) and asset size (Table 111). The impact of the COVID-19 pandemic is evident, particularly among micro, small, and medium enterprises (MSMEs), with many reporting declines in profitability, total sales/revenue, and market share.

For micro enterprises, across both tables, around 50-55% of micro enterprises found financial metrics not applicable, particularly in tangible cultural enterprises. Among those that provided responses, declines were dominant, with profitability decreasing for 44.44% (Table 110) and 50% (Table 111). Market share and revenue losses were significant, reflecting the heavy impact of the pandemic.

As for the small enterprises, a consistent pattern emerges: 60% reported declines in profitability and sales/revenue by employee size (Table 110), while 44.44% found these metrics not applicable by asset size (Table 111). Meanwhile for medium enterprises, the responses were divided equally (50-50%) between those experiencing growth and those finding financial outcomes not applicable in both tables. Medium enterprises showed stronger recovery signs compared to micro and small enterprises, with half reporting increased profitability, total sales/revenue, and market share.

Lastly, large enterprises were observed to be more resilient, with half seeing profitability and market share increases, and most (66.67%) experiencing revenue growth. This suggests that firms with larger asset bases had stronger financial buffers and adaptability during economic disruptions.

Looking at the study conducted by the Asian Development Bank Institute (ADBI) for MSMEs in the Philippines, it was found out that 59.9% of micro enterprises obtained zero sales in March of 2020 due to the sudden closure of businesses, this was followed by small businesses specifically, 44.80% and medium-sized firms at 35.80%. It was also reported that those MSMEs that operated during the imposed lockdowns faced a significant decrease in sales (27.70% of micro, 43.60% of small, and 41% of medium-sized enterprises). More than half of the MSMEs observed also had no sales immediately after the lockdowns. The same can be said to their revenues, most MSMEs have no revenue and have experienced a sharp decline (Shinozaki & Rao, 2021, 21-22).

Table 110.

Distribution of Tourism Enterprises by Rating of Different Outcomes from 2021 to 2022, by Employee Size

Outcomes	Employee Size	Rating (%)				Total
		Decrease	Stay the same	Increase	Not Applicable	
Profitability	Micro	44.44	0.00	0.00	55.56	100.00
	Small	60.00	0.00	20.00	20.00	100.00
	Medium	0.00	0.00	50.00	50.00	100.00
	Large	0.00	60.00	40.00	0.00	100.00
Total Sales/ Revenue	Micro	33.33	11.11	0.00	55.56	100.00
	Small	60.00	0.00	20.00	20.00	100.00
	Medium	0.00	0.00	50.00	50.00	100.00
	Large	0.00	40.00	60.00	0.00	100.00
Market Share	Micro	22.22	22.22	0.00	55.56	100.00
	Small	60.00	20.00	0.00	20.00	100.00
	Medium	0.00	0.00	50.00	50.00	100.00
	Large	0.00	60.00	40.00	0.00	100.00

Table 111.

Distribution of Tourism Enterprises by Rating of Different Outcomes from 2021 to 2022, by Asset Size

Outcomes	Asset Size	Rating (%)				Total
		Decreased	No change	Increased	Not Applicable	
Profitability	Micro	50.00	0.00	0.00	50.00	100.00
	Small	44.44	0.00	11.11	44.44	100.00
	Medium	50.00	0.00	0.00	50.00	100.00

	Large	0.00	50.00	50.00	0.00	100.00
Total Sales/ Revenue	Micro	50.00	0.00	0.00	50.00	100.00
	Small	33.33	11.11	11.11	44.44	100.00
	Medium	50.00	0.00	0.00	50.00	100.00
	Large	0.00	33.33	66.67	0.00	100.00
Market Share	Micro	25.00	25.00	0.00	50.00	100.00
	Small	33.33	22.22	0.00	44.44	100.00
	Medium	50.00	0.00	0.00	50.00	100.00
	Large	0.00	50.00	50.00	0.00	100.00

The table below (Table 112) explores the different behaviors of employees at work and how much (in percentage) of these employees are distributed among the observed tourism enterprises. Consistent with the results in Table 53 showing that above 50% of the employees are able to perform their job but not beyond, most of the tourism enterprises responded that 10 to 50% of their employees go above and beyond what is expected from them without any directives or instructions to do so. According to most of the respondents, less than 10% take up the duties of a co-worker even without an order. Although almost all are more than 25%, responses for 10 to 50% percent are higher when it comes to those employees who regularly put in more hours than what is required and contractually expected to them (38.10%). Lastly, most of the respondents also answered that 10 to 50% of their employees make up those who think of helpful suggestions for improving their organizations' operations.

Table 112.

Distribution of Tourism Enterprises by Percentage of Employees Exhibiting Various Behavior at Work

Behavior	Tourism Enterprises (%)				Total
	None	< 10	10-50	> 50	
Go above and beyond the 'call of duty' without being asked	4.76	28.57	52.38	14.29	100.00
Take up the duties of a colleague without being asked	4.76	42.86	14.29	38.10	100.00
Regularly put in more hours than contractually expected into their jobs	0.00	28.57	38.10	33.33	100.00
Make helpful suggestions for improving the operation within the organization	0.00	28.57	47.62	23.81	100.00

4.11 Workforce Matters

In connection to TESDA's priority to Technical Vocational Education, the table below (Table 113), shows the overall percentage of TVET Graduate and Certified employees out of those enterprises that responded with a specific quantity (in terms of %). Out of all the existing

employees of these enterprises, 13.02% are TVET graduates, while 12.95% of these are TVET certified.

Looking back at the data on educational attainment (Table 22-24), it was revealed that 'College Graduates', 'Old Curriculum Secondary Education Graduates' and 'College Undergraduates' consist the top three educational attainments with the highest number of employees, which explains such low percentages below.

Interestingly, TESDA's TVET Statistics of the 4th Quarter of 2022 along with past statistical data of TVET shows that the Tourism industry, specifically, hotel and restaurant is always included in the top three sectors with the most number of enrolled and graduated students (16.02% - enrollees, 15.84% - graduates). For the same publication under the same quarter of the same year, the tourism sector still had the highest number of assessed and certified TVET individuals with a percentage of 22.22% and 22.76% respectively (Technical Education and Skills Development Authority, 2022a, 6-7).

As such, the employability of the TVET graduates as well as the acceptability and recognition of the tourism enterprises must be explored. Provided that the current Study on the Employability of TVET Graduates (SETG) does not include the sectors/industries as its strata, it will be impossible to gain insights on the actual employment rate of the industry to compare the indicators for graduates vs employed.

Table 113.
Percentage of TVET Graduate Employees and TVET-Certified Employees

TVET Workforce	%
TVET Graduate Employees	13.02
TVET Certified Employees	12.95

Table 114 further distributes these TVET Graduate and Certified employees into the respective tourism industries. It can be observed that Mabuhay accommodations have the most of the overall TVET graduate employees with 38.41% which is followed by the recreational activities sector with 27.44%, tangible cultural activities has 24.28% of these employees while hotel accommodation has the least percentage at 9.88%.

In the case of TVET-certified employees, enterprises from Mabuhay accommodation still have most of the distribution with 38.62%, followed again by the recreational activities enterprises at 27.59%. Unlike the previous paragraph, hotel accommodation now has the third most percentage of the distribution with 23.17%, while tangible cultural services has now obtained the least of the distribution with 10.52%.

Table 114.
Distribution of TVET Graduate Employees and TVET-Certified Employees, by Industry

	Tourism Industry (%)
TVET Workforce	

	Accommodation		Recreational Activities (Sun and Beach)	Tangible Cultural Services (Museum)	Total
	Hotel	Mabuhay Accommodation			
TVET Graduate Employees	9.88	38.41	27.44	24.28	100.00
TVET Certified Employees	23.17	38.62	27.59	10.62	100.00

TVET Graduate and TVET Certified employees as seen in Table 115 below were then rated by the tourism enterprises, specifically how satisfied they are in terms of their work and performance. Most of the participating tourism enterprises (66.67%) for both types of TVET workforce considered such rating or section as not applicable since they are not currently employing TVET graduate and certified employees. Nevertheless for those enterprises that do have such employees in their workforce, 28.57% responded that they are indeed satisfied with their work and performance (as signified by the 'Agree' responses), both for TVET graduates and TVET certified employees. The remaining 4.76% of tourism enterprises, on the other hand, are neutral when it comes to satisfaction.

Table 115.

Distribution of Tourism Enterprises with TVET-Graduate and TVET Certified Employees by Satisfaction Rating on Employees' Work and Performance

TVET Workforce	Satisfaction Rating (%)						Total
	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Not Applicable	
TVET Graduate	0.00	0.00	4.76	28.57	0.00	66.67	100.00
TVET Certified	0.00	0.00	4.76	28.57	0.00	66.67	100.00

4.12 Indices

To provide additional analysis on how skills development and organizational practices impact both employee well-being and business performance, scores on various indices per responding tourism enterprise based on their responses to selected survey questions.

1. Skills Content Index (SCI) - The Skills Content Index assesses the level of skills required for specific jobs within an organization or economy. It evaluates factors such as required qualifications, training and continuous learning and development activities. Higher SCI values indicate positions that are more skill-intensive.

In Table 116, hotel accommodation enterprises secured the top 1 and 2 scores for SCI. This suggests that these enterprises likely have a significant number of skill-intensive positions. An enterprise under Mabuhay accommodation received the

lowest score in SCI, which signifies that their current job requirements are less skill-intensive.

Table 116.
SCI Score per Tourism Enterprise

Respondent Code	Subsector	College Degree	Induction Training of More than 2 weeks	Continuous learning/developmental activities	At least 3 years of industry-relevant experience to do the job	Sum
7	1. Accommodation a. Hotel	95	100	100	80	375
12	1. Accommodation a. Hotel	100	100	100	25	325
1	3. Tangible Cultural Services a. Museum	80	40	80	80	280
9	3. Tangible Cultural Services a. Museum	33.4	100	100	16.4	249.8
20	1. Accommodation a. Hotel	20	100	100	0	220
18	3. Tangible Cultural Services a. Museum	87.82	0	85	45	217.82
8	4. Recreational Activities - Sun and Beach	60	100	25	15	200
19	3. Tangible Cultural Services a. Museum	97.44	10	40	50	197.44
6	1. Accommodation a. Hotel	95	90	5	5	195
2	1. Accommodation c. Mabuhay Accommodation	90	50	30	20	190
5	3. Tangible Cultural Services a. Museum	50	30	50	50	180
13	1. Accommodation a. Hotel	70	40	40	20	170
16	3. Tangible Cultural Services	50	40	40	25	155

	a. Museum					
	3. Tangible Cultural Services					
3	a. Museum	50	15	15	70	150
	3. Tangible Cultural Services					
15	a. Museum	50	0	100	0	150
	3. Tangible Cultural Services					
17	a. Museum	50	0	100	0	150
	3. Tangible Cultural Services					
4	a. Museum	28	0	0	100	128
	1. Accommodation					
14	a. Hotel	20	100	0	0	120
	1. Accommodation					
11	c. Mabuhay Accommodation	50	0	40	0	90
	3. Tangible Cultural Services					
21	a. Museum	0	0	33.33	44.44	77.77
	1. Accommodation					
10	c. Mabuhay Accommodation	25	0	0	0	25

2. People Focus Index - The People Focus Index measures the emphasis an organization places on providing staff development opportunities.

In Table 117, hotel accommodation enterprises captured the top three positions for the people focus index score. An enterprise under tangible cultural services received the lowest people index score. It can be inferred from these results that more staff development opportunities are provided by hotel accommodation enterprises.

Table 117.
People Focus Index Score per Tourism Enterprise

Respondent Code	Subsector	We provide in-house learning and training programs.	We support learning and training programs conducted by private and public training providers.	We only provide or support learning and training programs that are required by the job (includes both in-house and external programs).	Employees have a say in their own learning and training needs.	Our learning and training programs cover future skills needs.	Our learning and training programs specifically cover STEM skills and competencies.	Sum
12	1. Accommodation a. Hotel	5	5	3	5	5	5	28
6	1. Accommodation a. Hotel	5	5	3	5	5	4	27
7	1. Accommodation a. Hotel	5	5	2	5	5	5	27
21	3. Tangible Cultural Services a. Museum	3	5	4	5	5	5	27
8	4. Recreational Activities - Sun and Beach	5	5	4	4	4	4	26
14	1. Accommodation a. Hotel	4	5	4	3	4	5	25
18	3. Tangible Cultural Services a. Museum	5	5	1	5	5	4	25
19	3. Tangible Cultural Services a. Museum	5	5	1	5	5	4	25
5	3. Tangible Cultural Services a. Museum	4	5	2	4	5	4	24
17	3. Tangible Cultural Services a. Museum	5	5	2	4	5	2	23
9	3. Tangible Cultural Services a. Museum	5	5	2	3	4	3	22

15	3. Tangible Cultural Services a. Museum	4	4	2	4	4	4	22
1	3. Tangible Cultural Services a. Museum	4	4	2	4	4	3	21
2	1. Accommodation c. Mabuhay Accommodation	4	4	2	3	4	4	21
10	1. Accommodation c. Mabuhay Accommodation	5	5	1	4	3	3	21
13	1. Accommodation a. Hotel	4	4	3	3	4	3	21
3	3. Tangible Cultural Services a. Museum	4	4	2	3	4	3	20
16	3. Tangible Cultural Services a. Museum	4	4	2	4	3	3	20
20	1. Accommodation a. Hotel	4	4	2	3	4	3	20
11	1. Accommodation c. Mabuhay Accommodation	1	5	1	4	4	2	17
4	3. Tangible Cultural Services a. Museum	4	4	2	2	2	2	16

3. Mutual Gains Index (MGI) - The Mutual Gains Index evaluates the extent to which both employers and employees benefit from workplace arrangements. It considers factors like employee compensation, job security, and career advancement opportunities. A higher MGI signifies a workplace that creates win-win scenarios for all parties involved.

In Table 118, one enterprise each from Recreational Activities - Sun and Beach, Tangible Cultural Services, and Hotel Accommodation achieved the same MGI score, indicating that their employees receive a range of benefits. However, a respondent

from Mabuhay Accommodation reported the lowest score, with a zero (0) in this index.

Table 118.
MGI Score per Tourism Enterprise

Respondent Code	Subsector	Individual performance related pay	Bonuses based on overall organizational performance	Share options for employees	Eligible for internal promotion	Non-pay benefits	Opportunities for job rotation at other locations	Overtime pay	Others	Sum
8	4. Recreational Activities - Sun and Beach	100	100	0	100	100	100	100	100	700
9	3. Tangible Cultural Services a. Museum	100	100	100	100	100	100	100	0	700
12	1. Accommodation a. Hotel	100	100	100	100	100	100	100	0	700
13	1. Accommodation a. Hotel	100	100	100	100	100	100	70	0	670
3	3. Tangible Cultural Services a. Museum	100	100	100	100	100	100	0	0	600
15	3. Tangible Cultural Services a. Museum	100	100	100	100	0	100	0	0	500
20	1. Accommodation a. Hotel	100	100	0	100	100	0	100	0	500
1	3. Tangible Cultural Services a. Museum	0	100	0	100	100	100	80	0	480
14	1. Accommodation	0	100	50	100	100	0	100	0	450

	a. Hotel									
	1. Accommodation									
7	a. Hotel	100	0	0	100	0	100	100	0	400
	3. Tangible Cultural Services									
17	a. Museum	100	0	0	30	100	50	25	0	305
	3. Tangible Cultural Services									
5	a. Museum	0	100	0	0	100	0	100	0	300
	1. Accommodation									
6	a. Hotel	50	20	0	0	0	100	100	0	270
	1. Accommodation									
2	c. Mabuhay Accommodation	0	0	0	50	20	50	100	0	220
	3. Tangible Cultural Services									
4	a. Museum	0	100	0	0	100	0	0	0	200
	3. Tangible Cultural Services									
18	a. Museum	0	80	0	0	100	0	0	0	180
	3. Tangible Cultural Services									
19	a. Museum	0	80	0	0	100	0	0	0	180
	3. Tangible Cultural Services									
16	a. Museum	0	50	0	50	0	0	0	0	100
	3. Tangible Cultural Services									
21	a. Museum	0	33.33	0	0	27.8	0	0	27.8	88.93
	1. Accommodation									
10	c. Mabuhay Accommodation	0	0	0	0	100%	0	100%	0	2
	1. Accommodation									
11		0	0	0	0	0	0	0	0	0

	ation c. Mabuhay Accommod ation									
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4. Employee Participation Index - The Employee Participation Index gauges the level of involvement employees have in decision-making processes within the organization. It assesses the degree to which employees can influence workplace practices, policies, and innovations, promoting a sense of ownership and engagement.

In Table 119, three enterprises in tangible cultural services, two in hotel accommodation, and one in Mabuhay accommodation obtained the highest scores for employee participation. In contrast, four enterprises in tangible cultural services, as well as one from hotel accommodation and one from Mabuhay accommodation, received the lowest scores. These findings highlight the variability in employee participation practices within the tourism sector.

Table 119.

Employee Participation Index Score per Tourism Enterprise

Respondent Code	Subsector	Financial information	Business plans	Operational challenges	Market analysis	Sum
4	3. Tangible Cultural Services a. Museum	3	3	3	3	12
5	3. Tangible Cultural Services a. Museum	3	3	3	3	12
6	1. Accommodation a. Hotel	3	3	3	3	12
7	1. Accommodation a. Hotel	3	3	3	3	12
9	3. Tangible Cultural Services a. Museum	3	3	3	3	12
11	1. Accommodation c. Mabuhay Accommodation	3	3	3	3	12
15	3. Tangible Cultural Services a. Museum	3	3	3	3	12
1	3. Tangible Cultural Services a. Museum	3	3	3	2	11
8	4. Recreational Activities - Sun and Beach	2	3	3	3	11
2	1. Accommodation c. Mabuhay Accommodation	2	2	3	3	10

13	1. Accommodation a. Hotel	2	3	3	2	10
17	3. Tangible Cultural Services a. Museum	2	3	3	2	10
14	1. Accommodation a. Hotel	2	2	3	2	9
20	1. Accommodation a. Hotel	2	2	3	2	9
21	3. Tangible Cultural Services a. Museum	2	2	3	2	9
3	3. Tangible Cultural Services a. Museum	2	2	2	2	8
10	1. Accommodation c. Mabuhay Accommodation	2	2	2	2	8
12	1. Accommodation a. Hotel	1	2	3	2	8
16	3. Tangible Cultural Services a. Museum	2	2	2	2	8
18	3. Tangible Cultural Services a. Museum	2	2	2	2	8
19	3. Tangible Cultural Services a. Museum	2	2	2	2	8

5. Value-Add Index -The Value-Add Index measures the additional value created by employees through their work. It considers how effectively employees utilize their skills to enhance productivity, innovation, and overall organizational performance.

In Table 120, an enterprise in tangible cultural services achieved the highest score for value-add, followed by an enterprise in hotel accommodation. Conversely, another enterprise in hotel accommodation recorded the lowest score in the value-add index. These results indicate the variability in how employees within the sector apply their skills to enhance overall organizational performance.

Table 120.*Value-Add Index Score per Tourism Enterprise*

Respondent Code	Subsector	Compared to other enterprises in the tourism sector, there is a 'more-than-average' amount of customization in our products and services	Compared to other enterprises in the tourism sector the competitive success of our products and services is dependent on price in the vast majority of cases	Our business mostly competes in a market of premium quality products or services	Our products and services rely on developing unique or innovative products or services	Sum
17	3. Tangible Cultural Services a. Museum	5	4	4	5	18
7	1. Accommodation a. Hotel	5	2	5	5	17
6	1. Accommodation a. Hotel	5	1	5	5	16
8	4. Recreational Activities - Sun and Beach	5	1	5	5	16
12	1. Accommodation a. Hotel	5	3	5	3	16
4	3. Tangible Cultural Services a. Museum	3	4	4	4	15
13	1. Accommodation a. Hotel	4	2	5	4	15
2	1. Accommodation c. Mabuhay Accommodation	4	2	4	4	14
3	3. Tangible Cultural Services a. Museum	4	2	4	4	14
15	3. Tangible Cultural Services a. Museum	4	2	4	4	14
20	1. Accommodation a. Hotel	2	3	4	5	14
21	3. Tangible Cultural Services a. Museum	3	3	5	3	14
5	3. Tangible Cultural Services a. Museum	3	4	2	4	13

10	1. Accommodation c. Mabuhay Accommodation	4	2	3	4	13
9	3. Tangible Cultural Services a. Museum	3	3	2	4	12
11	1. Accommodation c. Mabuhay Accommodation	2	2	4	4	12
16	3. Tangible Cultural Services a. Museum	3	3	3	3	12
18	3. Tangible Cultural Services a. Museum	3	3	3	3	12
19	3. Tangible Cultural Services a. Museum	3	3	3	3	12
1	3. Tangible Cultural Services a. Museum	3	2	3	3	11
14	1. Accommodation a. Hotel	4	0	3	3	10

6. State of Technology Index - The State of Technology Index assesses the level of technological advancement within an organization. It evaluates the adoption and integration of modern technologies in work processes, which can influence productivity and the nature of work tasks.

In Table 121, one enterprise each from Mabuhay accommodation, hotel accommodation, and tangible cultural services achieved the highest score in the state of technology index. Conversely, one enterprise in tangible cultural services and another in hotel accommodation received the lowest score. These results signify varying perceptions of the state of technology within the tourism sector.

Table 121.

State of Technology Index Score per Tourism Enterprise

Respondent Code	Subsector	Compared with those in the country	Compared with those in the overseas	Sum
2	1. Accommodation c. Mabuhay Accommodation	3	3	6
6	1. Accommodation a. Hotel	3	3	6
17	3. Tangible Cultural Services a. Museum	3	3	6
3	3. Tangible Cultural Services a. Museum	3	2	5

7	1. Accommodation a. Hotel	3	2	5
8	4. Recreational Activities - Sun and Beach	3	2	5
9	3. Tangible Cultural Services a. Museum	3	2	5
18	3. Tangible Cultural Services a. Museum	3	2	5
19	3. Tangible Cultural Services a. Museum	3	2	5
4	3. Tangible Cultural Services a. Museum	2	2	4
10	1. Accommodation c. Mabuhay Accommodation	2	2	4
15	3. Tangible Cultural Services a. Museum	2	2	4
16	3. Tangible Cultural Services a. Museum	2	2	4
21	3. Tangible Cultural Services a. Museum	3	1	4
1	3. Tangible Cultural Services a. Museum	2	1	3
11	1. Accommodation c. Mabuhay Accommodation	2	1	3
13	1. Accommodation a. Hotel	2	1	3
14	1. Accommodation a. Hotel	1	2	3
20	1. Accommodation a. Hotel	2	1	3
5	3. Tangible Cultural Services a. Museum	1	1	2
12	1. Accommodation a. Hotel	1	1	2

7. Organizational Performance Index - The Organizational Performance Index measures the overall effectiveness of an organization in achieving its goals. It encompasses various performance metrics, including financial outcomes, market position, and operational efficiency.

In Table 122, two enterprises under Hotel accommodation and one enterprise under Recreational activities received the highest score in the organizational performance index. However, 7 enterprises under Tangible cultural services scored zero (0) in this index. For these enterprises that scored 0 in this index, they may have different goals and objectives which are not necessarily concerned with profitability, sales, revenue and market share.

Table 122.*Organizational Performance Index Score per Tourism Enterprise*

Respondent Code	Subsector	Profitability	Total sales/revenue	Market share	Sum
6	1. Accommodation a. Hotel	3	3	3	9
7	1. Accommodation a. Hotel	3	3	3	9
8	4. Recreational Activities - Sun and Beach	3	3	3	9
20	1. Accommodation a. Hotel	3	3	2	8
13	1. Accommodation a. Hotel	2	3	2	7
18	3. Tangible Cultural Services a. Museum	2	2	2	6
19	3. Tangible Cultural Services a. Museum	2	2	2	6
1	3. Tangible Cultural Services a. Museum	1	2	2	5
14	1. Accommodation a. Hotel	1	1	2	4
2	1. Accommodation c. Mabuhay Accommodation	1	1	1	3
5	3. Tangible Cultural Services a. Museum	1	1	1	3
10	1. Accommodation c. Mabuhay Accommodation	1	1	1	3
11	1. Accommodation c. Mabuhay Accommodation	1	1	1	3
12	1. Accommodation a. Hotel	1	1	1	3
3	3. Tangible Cultural Services a. Museum	0	0	0	0
4	3. Tangible Cultural Services a. Museum	0	0	0	0
9	3. Tangible Cultural Services a. Museum	0	0	0	0

15	3. Tangible Cultural Services a. Museum	0	0	0	0
16	3. Tangible Cultural Services a. Museum	0	0	0	0
17	3. Tangible Cultural Services a. Museum	0	0	0	0
21	3. Tangible Cultural Services a. Museum	0	0	0	0

8. Discretionary Effort Index - The Discretionary Effort Index evaluates the extent to which employees are willing to go beyond their basic job requirements. It reflects the level of employee engagement and motivation to contribute additional effort towards organizational success.

In Table 123, two enterprises under tangible cultural services received the highest score in discretionary effort. Conversely, there are also two enterprises under tangible cultural services along with two Hotel accommodation enterprises that scored the lowest in discretionary effort. These results show that employee engagement varies across enterprises in the tourism sector.

Table 123.

Discretionary Effort Index Score per Tourism Enterprise

Respondent Code	Subsector	Go above and beyond the 'call of duty' without being asked	Take up the duties of a colleague without being asked	Regularly put in more hours than contractually expected into their jobs	Make helpful suggestions for improving the operation within the organization	Sum
4	3. Tangible Cultural Services a. Museum	3	3	3	3	12
9	3. Tangible Cultural Services a. Museum	3	3	3	3	12
2	1. Accommodation c. Mabuhay Accommodation	2	3	3	3	11
7	1. Accommodation a. Hotel	3	3	3	2	11
6	1. Accommodation a. Hotel	1	3	3	3	10
13	1. Accommodation a. Hotel	2	3	3	2	10

10	1. Accommodation c. Mabuhay Accommodation	2	3	2	2	9
15	3. Tangible Cultural Services a. Museum	0	3	3	3	9
3	3. Tangible Cultural Services a. Museum	2	2	2	2	8
12	1. Accommodation a. Hotel	2	2	2	2	8
8	4. Recreational Activities - Sun and Beach	2	1	2	2	7
16	3. Tangible Cultural Services a. Museum	2	2	1	2	7
21	3. Tangible Cultural Services a. Museum	2	1	2	2	7
5	3. Tangible Cultural Services a. Museum	2	0	2	2	6
11	1. Accommodation c. Mabuhay Accommodation	2	1	2	1	6
17	3. Tangible Cultural Services a. Museum	2	1	2	1	6
1	3. Tangible Cultural Services a. Museum	1	1	1	2	5
14	1. Accommodation a. Hotel	1	1	1	1	4
18	3. Tangible Cultural Services a. Museum	1	1	1	1	4
19	3. Tangible Cultural Services a. Museum	1	1	1	1	4
20	1. Accommodation a. Hotel	1	1	1	1	4

The study also analyzed the relationships between the index scores by examining their correlations. The SCI and MGI showed a correlation coefficient of 0.54, indicating a positive correlation. This positive correlation suggests that higher skill content in jobs is linked to better mutual gains for both employers and employees. This also implies that workplaces in the tourism sector that have more skill-intensive roles often experience positive outcomes such as increased productivity, improved wages, enhanced job satisfaction, and stronger employer-employee relationships. This also highlights that investing in skills benefits

individual workers with higher wages and career advancement while simultaneously boosting business performance and competitiveness.

CHAPTER 5 CONCLUSIONS AND RECOMMENDATIONS

The survey collected data on various topics ranging from facility-specific information (employee demographics, performance, competencies, and skills gaps of existing employees, and satisfaction on TVET graduate and certified employees) to industry-wide information (jobs and skills projections, emerging skills, and green jobs), among others. All these collected data and information are critical inputs to the SNA study.

In summary, the participating tourism enterprises have a relatively young workforce (ages 18 to 34 years old); the highest percentage of employees are in elementary occupation, work as full-time regular employees, and the majority are college graduates (45.25%). Additionally, in terms of asset size, the highest percentage (42.86%) are small enterprises, which according to the Magna Carta for SMEs has an asset of PhP 3,000,001 - PhP 15,000,000. With regards to the employee size, the highest percentage (also at 42.86%) are micro enterprises, defined by the Philippine Statistical Authority (PSA) as having less than 10 employees. Although the Philippine Tourism Industry boasts of the high representation of women, as also reflected in the results of the study, it will be critical to examine the type of occupations being held by women. Although 45.74% of the managerial occupations are held by women, the most women-dominated occupations are still on clerical support workers, which may be inclined to the traditional societal roles for women representing lower pay rates, and are subjected to poor working conditions (Garofano et al., 2017, 14).

The highest percentage of the facilities experienced either no change or an increase in their employee size from 2021 to 2022, which may be attributed to the imposed lockdowns and stricter restrictions during the pandemic. Businesses are still slowly recovering and opening in 2022 which may mean more demand for jobs.

On the projection of the skills supply in the next five years, several jobs are projected to be hard-to-fill across all the tourism industries, with some of the occupations also having the highest shortage of workers namely Muslim Friendly Food Production (Halal Muslim), Laundry Manager, Acoustic Design, Photogrammetry, and Guest Relations Manager. For the hard-to-fill requirements under the Accommodation Industry, it may be observed that all are higher-level qualifications; most of which require a Bachelor's degree but are still identified as addressable by TVET and require a TechVoc or National Certificate. Regardless of the need for a bachelor's degree, the skills requirements of several tourism-related jobs are determined to be sufficiently addressed by TVET.

By policy, 57.22% of the positions require a college degree, and the majority also indicated that in more than 50% of the existing positions, continuous learning or development activities are required. As such, training and capacity-development initiatives may be considered critical for the Tourism sector. Relative to this, the conduct of learning and development programs is one of the most common interventions used by the facilities for high-potential

employees, together with job reassignments. Although the expansion of trainee programs and re-training are conducted for underperforming employees, sometimes or as necessary, reviewing of appraisals/performance, mentoring, and intensifying staff supervision are regularly performed.

Moreover, the most tourism enterprises are planning to expand in infrastructure and facilities development, as well as actions for sustainability and innovation, human resource and skills development, and tourism and economic growth, particularly on the creation of additional jobs. Investing in infrastructure and other forms of capital formation (including human capital) is vital in the Tourism sector, provided that these impact the quality of services provided.

The presence and demand of TVET graduates and TVET certified employees mostly range to 10% to 13% of the total employees, with the highest percentage observed for Mabuhay Accommodation followed by Recreational Activities (Sun and Beach). Nonetheless, the facilities are at least satisfied with the performance of the TVET employees that they have.

Further, the report highlights key challenges and insights regarding the Tourism Sector, particularly in the areas of workforce development, business resilience, and technological adaptation. The impact of COVID-19 pandemic has also been substantial, particularly on micro and small enterprises, leading to revenue losses and downsizing. Despite these, there is a strong recognition among enterprises of the need for workforce upskilling and reskilling, although the extent of implementation varies by tourism industry.

Listed below are the specific gaps identified in several areas including workforce development, organizational and business performance, sustainability, and technological adaptation.

Gaps Identified:

1. Limited representation of TVET Graduates — Regardless of the need for a bachelor's degree, the skill requirements of several tourism-related jobs are determined to be sufficiently addressed by TVET and identified by the tourism enterprises as in need for a National Certificate. However, by policy and by distribution of the current employees, those who are TechVoc Graduates as the highest educational attainment are only below 6%.
2. Job security, low wages, and better opportunities as barriers to recruitment — High turnover rates and resignation are experienced in the Sector. Except for Tangible Cultural Services (Museum), for all of the tourism industries at least 30% of the tourism enterprises experience a fast turnover which may be attributed to the tourism sector's seasonality and fluctuations (e.g. some employees hired on a temporary basis), especially at entry-level. Although there is a high demand for workers, some occupations do not provide long-term and sustained opportunities; thus difficulty in filling the vacancies.
3. Prevalence of gender-based imbalances in employment — Generally, women are well-represented in the industry, with the distribution of employees per tourism industry being at 25% to 61%. When analyzed against the occupational type, the top three occupational groups being held by women are Clerical Support Workers,

Managers, and Technicians and Associate Professionals. The low representation on non-traditional trades, and STEM-related occupations is reflective of how sex stereotyping and sex segregation may still heavily influence the quality and type of work available to women.

4. Lack of awareness on emerging requirements related to Green Jobs — The majority of the enterprises (19 out of 21) are moving towards greening the industry, particularly with the call for a more sustainable industry. Several initiatives were identified and six enterprises have already received or sought support from any of the government agencies stipulated in the Philippine Green Jobs Act. However, only 2 out of 21 enterprises were aware of the emerging skills resulting from green jobs and both of which are part of the National Museum which may explain the case. Provided this, the majority also rated as highest the need to have knowledge on all of the green industry developments followed by the need to enhance competencies.
5. Varying capacity for investment in learning and development programs — Skills and workforce development is recognized as a crucial aspect for all of the tourism enterprises, regardless of their employee and asset size. Still, it is observed that larger enterprises have demonstrated a greater capacity for investment in learning and development programs, while smaller enterprises struggle with resource allocation.
6. Financial constraints and infrastructure availability as a challenge for technological adaptation — The findings indicate that micro and small enterprises face significant barriers in keeping up with technological advancements, often lagging behind their global counterparts by one to five years more. Financial constraints, lack of digital infrastructure, and limited access to training contribute to these challenges.
7. Readiness of the enterprises to emerging skills and new industry developments — The awareness of emerging skills is relatively high, at least 50% in most industries and the results suggest a strong focus on human resource development (prioritizing the upskilling and reskilling of their workforce). Still, the disparity in digital adoption levels may explain why some emerging skills, such as AI and Big Data, are viewed as both highly demanded and not applicable. Larger, tech-driven enterprises see these as essential, while smaller or traditionally operated businesses may not yet perceive their relevance.

To address these gaps, the following are the recommendations specific to the industry, TESDA, and other relevant government agencies on the identified issues and policy implication on several areas covering the development of the Tourism Industry:

On addressing workforce skills development:

1. As part of the prioritization process, TESDA shall facilitate the presentation of the priority requirements for Training Regulations development to the TESDA Board.
 - a. The following are the priority requirements identified for Training Regulations development and pending for presentation to the TESDA Board:

Tourism Industry	Value Chain	Job / Skill Requirement for Competency Standards Development	Priority Ranking
Accommodation	Housekeeping	Executive Housekeeper	High (Priority 1)
	Food Production	Executive Chef	High (Priority 1)
	Others	Hotel Manager	High (Priority 1)
		Hotel Supervisor	Medium (Priority 2)
Tangible Cultural Heritage	Museum	Art Gallery/Museum Curator	High (Priority 1)
		Museum Technician	High (Priority 1)
		Museum Researcher	High (Priority 1)
		Painting Restorer	High (Priority 1)
Recreational - Sun and Beach	N/A	Boat Operator	High (Priority 1)
Cross Sectoral	N/A	Maintenance Technician	Medium (Priority 2)

b. The office shall consult with the Tourism Industry Board Foundation Inc. (TIBFI) as the designated Industry TVET Board for Tourism and other key stakeholders who shall then serve as industry champions and lead the presentation to the TESDA Board.

2. TESDA shall prioritize the development and implementation of training programs to fulfill the requirements of the tourism industry, especially for the identified jobs that are difficult to replace and the jobs that are most applicable across the tourism subsectors.

a. The following job and skill requirements are identified as a priority and recommended for the development of a competency standard (*categorized as high and medium priority*)

Tourism Industry	Value Chain	Job / Skill Requirement for Competency Standards Development	Priority Ranking
Accommodation	Front Office	Front Office Manager	High (Priority 1)
		Hotel Front Desk Clerk	Medium (Priority 2)
		Bell Boy/Luggage Porter	Medium (Priority 2)
		Guest Staff	Medium (Priority 2)
	Housekeeping	Room Attendant	Medium (Priority 2)
Tangible Cultural Heritage	Museum	Museum Guide	High (Priority 1)

		Gallery Assistant	Medium (Priority 2)
		Exhibits Specialist	Medium (Priority 2)
Cross Sectoral	N/A	Purchasing Officer	Medium (Priority 2)
		Human Resource Assistant	Medium (Priority 2)
		General Office Clerk	Medium (Priority 2)

- b. Except for boat operator, maintenance technician, bell boy/luggage porter, and room attendant, all the other listed occupations were considered by majority of the tourism enterprises (60% to 100%) as in need of a Bachelor's Degree although they also responded that these jobs would still require a National Certificate. Thus, the participation of the TIBFI will be critical, in all the processes from the development of competency standards/training regulations, development of curriculum, development of trainers and assessors, and in serving as implementers of the training programs.
- c. In terms of the emerging skills, the following are anticipated to be more demanded in the next five years and may also be considered for program development or for embedment as part of the common competencies:
- i. Digital technology and solutions
 - ii. Emergency response system
 - iii. Digital registration process
 - iv. Crisis Management (e.g. Mental Health Awareness, Disaster Risk Reduction and Management)
 - v. Basic Foreign Language (i.e Chinese, Japanese, Korean)
 - vi. Sign language interpretation
 - vii. Emergency preparedness and resiliency
 - viii. Inclusive tourism (cultural sensitivity)
 - ix. Barrier free tourism - accessibility (PWD facilitation)
 - x. Inclusive tourism (gender sensitivity)
 - xi. Sustainable Tourism Governance (in light of the Mandanas Ruling Implementation)
 - xii. Filipino Brand of Service Excellence
 - xiii. Destination marketing and promotions
 - xiv. Tourism branding and marketing
 - xv. Tourism trends and forecasts
 - xvi. Technology and digitalization in Tourism
- d. TESDA to continuously integrate emerging green competencies in the existing tourism-related TVET programs.
- e. In view of the development of programs, TESDA shall also consider micro-credential programs to equip tourism workers with additional skills (e.g. hospitality, customer service, and digital marketing), making them employable beyond seasonal work.

- f. TESDA shall also prioritize the review of Training Regulations for the job requirements identified to have a corresponding TVET Program but based on the focus group discussion conducted as part of the TR Evaluation process shall be subjected to review and updating. The requirements are as follows:

Tourism Job/Skill Requirements	Corresponding TVET Program for TR Review
Reservation Clerk	Travel Services NC II
Laundry Attendant	Housekeeping NC II
Butler	Housekeeping NC II
Photographer	Photography NC II
Gardener	Landscape Installation and Maintenance (Softscape) NC II

3. TESDA shall explore mechanisms to enhance the employability of the TVET graduates.
- a. The Agency shall work with the Department of Tourism (DOT), TIBFI, and other associations to enhance the reputation and employability of the TVET graduates.
 - b. The Agency shall likewise collaborate with the Department of Labor and Employment (DOLE) to facilitate employer engagement programs to encourage the higher recruitment of TVET graduates.
 - c. The Agency shall collaborate with the Department of Education (DepEd) and Commission on Higher Education (CHED) to integrate TVET pathways to tourism education, in view of the ASEAN Mutual Recognition Agreement of Tourism Professionals.
 - d. The Agency may try to encourage the industry to update hiring policies to recognize TVET graduates and TVET certified as qualified candidates, particularly in occupations whose technical skills and competencies outweigh academic qualifications. Additionally, the industry may be encouraged to pursue skills-based hiring rather than degree-based requirements to attract competent TVET-trained professionals.
4. The tourism industry shall invest in upskilling and reskilling initiatives to address the lack of specialized technical and advanced skills in the tourism sector, including basic tourism skills, Filipino core values, and Filipino Brand of Service Excellence.
- a. Provided the varying capacity for investment in learning and development programs the industry, especially for micro and small enterprises, can leverage on government programs and incentives (e.g. training programs, sustainable tourism initiatives) to support workforce development.
 - b. TESDA may extend assistance to the industry for the conduct of learning and development programs (i.e. upskilling and reskilling programs) through

scholarship provisions. The scholarship programs may also target women in non-traditional tourism jobs.

On addressing workforce and business operation challenges:

1. The industry may address the gender disparities among the nature of the occupations being given to women through more targeted recruitment strategies and initiatives that promote equal opportunities. It is also encouraged that gender-inclusive hiring policies be developed to reduce workplace biases and increase female representation particularly for technical and operational roles.
2. The industry shall spearhead a comprehensive review of the compensation and benefit packages provided the high turnover and resignation rates experienced.
 - a. Among others, the review shall explore the following:
 - i. Competitive wages, improved working conditions, and opportunities for professional development (training, promotion) to attract and retain talent;
 - ii. Development of targeted recruitment strategies to address the difficulty in replacing employees in critical roles;
 - iii. Proactive talent management strategies given the low percentage of enterprises with structured succession planning; and
 - iv. Strengthening of mentorship programs and leadership development initiatives to cultivate future leaders within the organization
3. As part of improving business operations and processes, the tourism enterprises may explore on the following:
 - a. Implement structured performance management programs to identify high-potential employees and provide targeted support;
 - b. Prepare comprehensive sustainability plans and strategies that will help address the allocation of resources, and incorporate sustainability into core business operations that will ensure compliance with relevant environmental regulations;
 - c. Conduct regular employee surveys to identify areas for improvement and gauge employee satisfaction;
 - d. Invest in digital infrastructure and capacity-building of the employees to support the adoption of technology and digital solutions (e.g., automated booking systems, digital marketing).
 - a. Strengthen digital marketing and promotion efforts to attract a wider range of tourists.

On the conduct of the survey:

TESDA shall explore the following recommendations aimed at improving the conduct of the survey, particularly in terms of the data collection process, which proves as one of the most challenging phases in the survey operation:

1. Future data gathering procedures should be conducted at a comfortable pace to enable more participation given also that other necessary resources are in place (e.g. budget, sufficient workforce/enumerators, etc.).

2. Non-participation of enterprises is always likely to happen, thus the replacements should always be included as early as survey development.
3. It would be best to know about the best data gathering methods for the respondents and categorize those that can accomplish the survey on their own and those who may need assistance from the researchers. Face-to-face and phone interviews may be considered. A portion of the respondent enterprises encountered difficulties in answering the survey via the online tool, Jotform. Future surveys might need to explore other data gathering instruments.
4. After sending the request to participate in the survey, a phone call should be made since most respondents stated that they do not regularly check their emails and have yet to read the invitation to participate. This is a preferable option since some email addresses are also already inactive or not used by the corresponding person of interest.
5. Some respondents expressed difficulties in understanding the survey questionnaire itself. Some are not proficient in understanding the language used (English). It might be best to have a version translated (preferably in Filipino), depending on the respondents especially if a large number of them are expected to have difficulty in understanding the questions.
6. A significant number of respondents expressed that the survey questionnaire is quite long but due to the objective of the study to be as comprehensive as possible, it would be recommended to offer a simple token or something in return in order to boost their willingness to participate and to fully complete the survey (e.g. a simple certificate of participation).
7. Although assistance from the organizations are helpful in reaching out to respondents and gathering their contact information, it would be best to communicate with the enterprises/respondents directly if no feedback was received after a specific time.

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Annex A

Mapping of the Priority Gateway Clusters vis-a-vis TEZs and ABDD Skills Priority

Priority Gateway Clusters - Region	Priority Gateway Province	Flagship TEZ/ Designated TEZ ¹	Region	
NP5: Central Luzon	NP5-A	Zambales	Region III	
		Bataan		Mt. Samat Shrine
	NP5-B	Clark		
		Subic		
		Tarlac		
		Pampanga		
	NP5-C	Bulacan		Ciudad Victoria
		Nueva Ecija		
		Aurora		
	NP6: Metro Manila and Environs	NP6-A		Metro Manila (e.g. Quezon City, Makati City, Manila City)
CP3: Palawan	CP3-A	Calamianes Group of Islands		Region IV-B (MIMAROPA)
	CP3-B	North Main Land	San Vicente Palawan	
	CP3-C	South Main Land (Puerto Princesa)		
CP5: Central Visayas and Negros Island	CP5-A	Cebu	Queen's Castle	Region VII (Central Visayas)
	CP5-B	Negros Oriental		
		Negros Occidental		
		Siquijor		
CP5-C	Bohol	South Palms		
SP5: Davao Gulf and Coast**	SP5-A	Davao Del Norte	Hijo, Davao	Region XI (Davao Region)
		Davao City		
		Samal Island		
	SP5-B	Davao Del Sur		
		Davao Occidental		
	SP5-C	Compostela Valley		
		Davao Oriental		

Source. ¹ RNTDP 2021-2022

Annex B.

Projected Distribution of the Skills Supply, Hard-to-Fill Skills, Educational Requirement, and Skills Addressable by TVET Programs for the Next 5 Years

Tourism Industry	Skills/Jobs	C6.1.		C6.2.			C6.3.		C6.4.			C6.5.		C6.6.		
		Is the skill applicable to your facility?		Will there be shortage, no change, or surplus in the skills supply?			Is the job hard to fill or not?		What is the highest educational qualification needed to perform the job?			Is a Technical Vocational Certificate/ National Certificate required?		Is this needed nationwide or only to a specific area?		
		If 1 - No, proceed to the next row. If 2 - Yes, proceed to C6.2 to C6.4.							If Code 2 "TVET Grad", proceed to C6.5 and C6.4. Else, proceed to the next row.			Answer only if response to C6.4 is Code 2 "TVET Grad"				
		1	2	1	2	3	1	2	1	2	3	1	2	1	2	3
		No	Yes	Shortage	No change	Surplus	Hard to fill	Not hard to fill	Basic Education Graduate (HS Grad Old Curriculum or SHS Graduate K-12 Curriculum)	Technical Vocational Education (TVET) Graduate	Higher Education Graduate (College Degree and above)	No	Yes	Nationwide	Specific Area Only	If needed only to a specific area, please specify the area.
A. Accommodation	A.1. Food Production															
	Executive Chef	33.33	66.67	60.00	20.00	20.00	80.00	20.00	0.00	0.00	100.00	0.00	100.00	100.00	0.00	
	Banquet Head Cook/Chef	44.44	55.56	75.00	25.00	0.00	75.00	25.00	0.00	25.00	75.00	0.00	100.00	100.00	0.00	
	Head Chef	44.44	55.56	75.00	25.00	0.00	75.00	25.00	0.00	50.00	50.00	33.33	66.67	100.00	0.00	
	Head Cook	55.56	44.44	66.67	33.33	0.00	66.67	33.33	33.33	33.33	33.33	66.67	33.33	100.00	0.00	
	Chef de Partie - Main Course Chef	55.56	44.44	66.67	33.33	0.00	66.67	33.33	0.00	66.67	33.33	33.33	66.67	100.00	0.00	

Chef de Partie - Entremetier	55.56	44.44	66.67	33.33	0.00	66.67	33.33	0.00	66.67	33.33	33.33	66.67	100.00	0.00		
Chef de Partie - Saucier	55.56	44.44	66.67	33.33	0.00	66.67	33.33	0.00	66.67	33.33	33.33	66.67	100.00	0.00		
Chef de Partie - Butcher Chef	55.56	44.44	66.67	33.33	0.00	66.67	33.33	0.00	66.67	33.33	33.33	66.67	100.00	0.00		
Commis Chef	55.56	44.44	33.33	66.67	0.00	66.67	33.33	0.00	66.67	33.33	33.33	66.67	100.00	0.00		
Commis Helper	55.56	44.44	33.33	66.67	0.00	33.33	66.67	0.00	100.00	0.00	33.33	66.67	100.00	0.00		
Demi Chef	66.67	33.33	50.00	50.00	0.00	50.00	50.00	0.00	50.00	50.00	50.00	50.00	100.00	0.00		
Sous-chef	55.56	44.44	33.33	66.67	0.00	33.33	66.67	0.00	66.67	33.33	33.33	66.67	100.00	0.00		
R&D Chef	77.78	22.22	50.00	50.00	0.00	50.00	50.00	0.00	0.00	100.00	0.00	100.00	0.00	100.00	None Specified	
Kitchen Assistant/Kitchenhand/ Kitchen Porter	55.56	44.44	33.33	66.67	0.00	33.33	66.67	33.33	66.67	0.00	33.33	66.67	100.00	0.00		
Kitchen Manager/Supervisor	66.67	33.33	50.00	50.00	0.00	100.00	0.00	0.00	0.00	100.00	0.00	100.00	100.00	0.00		
Pantry Attendant	66.67	33.33	50.00	50.00	0.00	50.00	50.00	0.00	100.00	0.00	50.00	50.00	100.00	0.00		
Roundsman	77.78	22.22	0.00	100.00	0.00	0.00	100.00	0.00	100.00	0.00	50.00	50.00	50.00	50.00	None Specified	
Dishwasher	55.56	44.44	0.00	100.00	0.00	33.33	66.67	100.00	0.00	0.00	100.00	0.00	100.00	0.00		
Baker (general)	55.56	44.44	33.33	66.67	0.00	33.33	66.67	0.00	100.00	0.00	33.33	66.67	100.00	0.00		
Patissier and Confectioner	55.56	44.44	66.67	33.33	0.00	33.33	66.67	0.00	66.67	33.33	33.33	66.67	100.00	0.00		
Delivery Helper	77.78	22.22	0.00	100.00	0.00	0.00	100.00	50.00	50.00	0.00	100.00	0.00	50.00	50.00	None Specified	
Deliveryman/crew	77.78	22.22	0.00	100.00	0.00	0.00	100.00	50.00	50.00	0.00	50.00	50.00	50.00	50.00	None Specified	
Food Safety Officer	55.56	44.44	33.33	66.67	0.00	66.67	33.33	0.00	0.00	100.00	0.00	100.00	100.00	0.00		
Muslim Friendly Food Production (Halal Muslim)	66.67	33.33	100.00	0.00	0.00	100.00	0.00	0.00	0.00	100.00	0.00	100.00	100.00	0.00		
Food Handling and Sanitation	55.56	44.44	66.67	33.33	0.00	66.67	33.33	0.00	0.00	100.00	0.00	100.00	100.00	0.00		
A.2. Front Office																
Front Office Manager	25.00	75.00	33.33	66.67	0.00	66.67	33.33	0.00	0.00	100.00	0.00	100.00	100.00	0.00		

Guest Relations Manager	50.00	50.00	75.00	25.00	0.00	100.00	0.00	0.00	0.00	100.00	0.00	100.00	100.00	0.00		
Front Office Supervisor	25.00	75.00	0.00	100.00	0.00	33.33	66.67	16.67	0.00	83.33	66.67	33.33	50.00	50.00	QC	
Guest Staff	42.86	57.14	0.00	75.00	25.00	0.00	100.00	25.00	0.00	75.00	50.00	50.00	100.00	0.00		
Hotel Attendants	57.14	42.86	33.33	66.67	0.00	33.33	66.67	0.00	33.33	66.67	50.00	50.00	100.00	0.00		
Hotel Front Desk Clerk	28.57	71.43	40.00	60.00	0.00	40.00	60.00	20.00	0.00	80.00	50.00	50.00	100.00	0.00		
Hotel Receptionist	25.00	75.00	16.67	83.33	0.00	33.33	66.67	16.67	0.00	83.33	66.67	33.33	50.00	50.00	QC	
Reservation Clerk	42.86	57.14	25.00	75.00	0.00	25.00	75.00	0.00	0.00	100.00	0.00	100.00	100.00	0.00		
Bell Boy/Luggage Porter	42.86	57.14	0.00	100.00	0.00	0.00	100.00	25.00	50.00	25.00	75.00	25.00	100.00	0.00		
Concierge	57.14	42.86	33.33	66.67	0.00	66.67	33.33	0.00	0.00	100.00	0.00	100.00	100.00	0.00		
A.3. Housekeeping																
Executive Housekeeper	0.00	100.00	62.50	37.50	0.00	62.50	37.50	12.50	12.50	75.00	50.00	50.00	66.67	33.33	QC	
Assistant Executive Housekeeper	62.50	37.50	66.67	33.33	0.00	66.67	33.33	0.00	0.00	100.00	0.00	100.00	100.00	0.00		
Floor Supervisor	37.50	62.50	40.00	60.00	0.00	40.00	60.00	40.00	0.00	60.00	33.33	66.67	100.00	0.00		
Laundry Manager	75.00	25.00	100.00	0.00	0.00	100.00	0.00	0.00	0.00	100.00	0.00	100.00	100.00	0.00		
Laundry Supervisor	75.00	25.00	50.00	50.00	0.00	50.00	50.00	0.00	0.00	100.00	0.00	100.00	100.00	0.00		
Laundry Attendant	50.00	50.00	0.00	100.00	0.00	25.00	75.00	50.00	50.00	0.00	75.00	25.00	100.00	0.00		
Laundry Worker/Operator (Hand or Machine)	75.00	25.00	0.00	100.00	0.00	0.00	100.00	0.00	100.00	0.00	50.00	50.00	100.00	0.00		
Laundry Valet/Runner	75.00	25.00	0.00	100.00	0.00	0.00	100.00	0.00	100.00	0.00	50.00	50.00	100.00	0.00		
Presser (Hand or Machine)	75.00	25.00	0.00	100.00	0.00	50.00	50.00	50.00	50.00	0.00	50.00	50.00	100.00	0.00		
Linen Attendant	62.50	37.50	0.00	100.00	0.00	33.33	66.67	33.33	66.67	0.00	66.67	33.33	100.00	0.00		
Tailor and Seamstress	62.50	37.50	33.33	66.67	0.00	66.67	33.33	33.33	66.67	0.00	66.67	33.33	100.00	0.00		
Room Attendant	12.50	87.50	42.86	57.14	0.00	28.57	71.43	28.57	57.14	14.29	50.00	50.00	100.00	0.00		
Window Cleaner	75.00	25.00	0.00	100.00	0.00	33.33	66.67	100.00	0.00	0.00	66.67	33.33	100.00	0.00		
Cloakroom Attendant	87.50	12.50	0.00	100.00	0.00	0.00	100.00	100.00	0.00	0.00	100.00	0.00	0.00	100.00	None Specified	

A.4. Others																
	Hotel Manager	0.00	100.00	50.00	50.00	0.00	75.00	25.00	0.00	0.00	100.00	50.00	50.00	50.00	50.00	QC
	Hotel Supervisor	50.00	50.00	50.00	50.00	0.00	25.00	75.00	25.00	0.00	75.00	50.00	50.00	100.00	0.00	
	Head Gardener	75.00	25.00	0.00	100.00	0.00	50.00	50.00	0.00	100.00	0.00	50.00	50.00	100.00	0.00	
	Gardener	62.50	37.50	0.00	100.00	0.00	0.00	100.00	66.67	33.33	0.00	100.00	0.00	100.00	0.00	
	Landscaper	62.50	37.50	0.00	100.00	0.00	0.00	100.00	33.33	66.67	0.00	100.00	0.00	100.00	0.00	
	Florist	62.50	37.50	0.00	100.00	0.00	33.33	66.67	33.33	0.00	66.67	50.00	50.00	100.00	0.00	
	Butler	62.50	37.50	0.00	100.00	0.00	33.33	66.67	0.00	33.33	66.67	50.00	50.00	100.00	0.00	
	House Detective (hotel)	62.50	37.50	0.00	100.00	0.00	33.33	66.67	0.00	0.00	100.00	0.00	100.00	100.00	0.00	
	Pool Lifeguards	50.00	50.00	50.00	50.00	0.00	50.00	50.00	25.00	75.00	0.00	0.00	100.00	100.00	0.00	
B. Tangible Cultural Heritage	Gallery Assistant	45.45	54.55	33.33	50.00	16.67	33.33	66.67	0.00	33.33	66.67	0.00	100.00	66.67	33.33	Museum Assignment
	Gallery Technician	54.55	45.45	40.00	20.00	40.00	40.00	60.00	0.00	40.00	60.00	0.00	100.00	66.67	33.33	Museum Assignment
	Art Gallery/Museum Curator	0.00	100.00	45.45	45.45	9.09	72.73	27.27	0.00	0.00	100.00	0.00	100.00	0.00	100.00	Museum Assignment
	Painting Restorer	45.45	54.55	50.00	16.67	33.33	83.33	16.67	0.00	33.33	66.67	0.00	100.00	66.67	33.33	Division
	Picture Restorer	63.64	36.36	75.00	0.00	25.00	75.00	25.00	0.00	50.00	50.00	0.00	100.00	100.00	0.00	
	Exhibits Specialist	45.45	54.55	33.33	50.00	16.67	33.33	66.67	0.00	33.33	66.67	0.00	100.00	66.67	33.33	Division
	Museum Guide	0.00	100.00	36.36	54.55	9.09	54.55	45.45	0.00	18.18	81.82	0.00	100.00	66.67	33.33	Museum Assignment
	Museum Researcher	18.18	81.82	55.56	33.33	11.11	55.56	44.44	0.00	11.11	88.89	0.00	100.00	50.00	50.00	Division
	Museum Technician	9.09	90.91	60.00	20.00	20.00	80.00	20.00	10.00	20.00	70.00	33.33	66.67	66.67	33.33	Museum Assignment
	Heritage Planner	81.82	18.18	0.00	100.00	0.00	100.00	0.00	0.00	0.00	100.00					
Heritage Site Guide	63.64	36.36	0.00	100.00	0.00	25.00	75.00	25.00	25.00	50.00	0.00	100.00	66.67	33.33	Local	
Heritage Tourism Operator	90.91	9.09	0.00	100.00	0.00	100.00	0.00	0.00	0.00	100.00						

	Heritage Tradesperson/Heritage Conservation Technician	72.73	27.27	33.33	66.67	0.00	66.67	33.33	0.00	0.00	100.00					
	Librarian	54.55	45.45	0.00	80.00	20.00	60.00	40.00	0.00	0.00	100.00					
	Librarian Assistant	72.73	27.27	0.00	66.67	33.33	100.00	0.00	0.00	0.00	100.00					
	Library Clerk	72.73	27.27	0.00	66.67	33.33	100.00	0.00	0.00	33.33	66.67	0.00	100.00	100.00	0.00	
	Library Technician	72.73	27.27	0.00	66.67	33.33	100.00	0.00	0.00	33.33	66.67	0.00	100.00	50.00	50.00	Main Office
	Archivist	36.36	63.64	28.57	57.14	14.29	71.43	28.57	0.00	14.29	85.71	100.00	0.00			
	Bibliographer	90.91	9.09	0.00	100.00	0.00	100.00	0.00	0.00	0.00	100.00					
	Cataloguer	81.82	18.18	50.00	50.00	0.00	100.00	0.00	0.00	50.00	50.00	0.00	100.00	50.00	50.00	Main Office & Museum Assignment
	Genealogist	90.91	9.09	100.00	0.00	0.00	100.00	0.00	0.00	0.00	100.00					
	Documentation Specialist	72.73	27.27	33.33	66.67	0.00	100.00	0.00	0.00	33.33	66.67	0.00	100.00	100.00	0.00	
	Records Manager	63.64	36.36	25.00	75.00	0.00	0.00	100.00	0.00	25.00	75.00	0.00	100.00	50.00	50.00	Museum Assignment
	Recreation Facilities Attendant/Aide	81.82	18.18	0.00	100.00	0.00	0.00	100.00	0.00	50.00	50.00	100.00	0.00			
	Facilitator	72.73	27.27	0.00	100.00	0.00	33.33	66.67	33.33	0.00	66.67	100.00	0.00	0.00	100.00	
	Lecturer	54.55	45.45	20.00	60.00	20.00	40.00	60.00	0.00	0.00	100.00					
	Researcher	45.45	54.55	0.00	83.33	16.67	66.67	33.33	0.00	0.00	100.00					
	Preventive Site Maintenance	54.55	45.45	20.00	60.00	20.00	40.00	60.00	40.00	20.00	40.00	66.67	33.33	66.67	33.33	Main Office
	Park Sweeper	63.64	36.36	0.00	50.00	50.00	0.00	100.00	75.00	25.00	0.00	75.00	25.00	100.00	0.00	
	Acoustic Design	81.82	18.18	0.00	100.00	0.00	100.00	0.00	0.00	50.00	50.00	0.00	100.00	50.00	50.00	Museums
	Photogrammetry	72.73	27.27	66.67	33.33	0.00	100.00	0.00	0.00	66.67	33.33	0.00	100.00	66.67	33.33	Main Office and Museums
C. Recreational - Sun and Beach	Beach Resort Experience	0.00	100.00	100.00	0.00	0.00	100.00	0.00	0.00	0.00	100.00					

	Manager/Beach Resort Manager																
	Beach Recreation Associate	0.00	100.00	100.00	0.00	0.00	100.00	0.00	0.00	0.00	100.00						
	Sea Patrol (Bantay Dagat)	100.00	0.00														
	Surf Instructor	100.00	0.00														
	Underwater Diving Instructor	100.00	0.00														
	Sailing Coach	100.00	0.00														
	Environmental Officer	0.00	100.00	100.00	0.00	0.00	100.00	0.00	0.00	0.00	100.00						
	Safety Officer	0.00	100.00	100.00	0.00	0.00	100.00	0.00	0.00	0.00	100.00						
	Boat Operator	0.00	100.00	100.00	0.00	0.00	100.00	0.00	0.00	100.00	0.00	0.00	100.00	100.00	0.00		
	Beach Lifeguards	0.00	100.00	100.00	0.00	0.00	100.00	0.00	0.00	100.00	0.00	0.00	100.00	100.00	0.00		
D. Cross Sectoral	General Office Clerk	50.00	50.00	0.00	80.00	20.00	20.00	80.00	10.00	10.00	80.00	33.33	66.67	60.00	40.00		Main Office QC
	Cash Clerk/Cashier	50.00	50.00	10.00	90.00	0.00	30.00	70.00	0.00	10.00	90.00	0.00	100.00	100.00	0.00		
	Wages/Payroll Clerk	55.00	45.00	0.00	100.00	0.00	22.22	77.78	0.00	0.00	100.00	0.00	100.00	50.00	50.00		Main Office
	Bookkeeping Clerk	60.00	40.00	0.00	87.50	12.50	12.50	87.50	0.00	0.00	100.00	0.00	100.00	50.00	50.00		Main Office
	Human Resource Assistant	45.00	55.00	18.18	81.82	0.00	36.36	63.64	0.00	0.00	100.00	0.00	100.00	50.00	50.00		Main Office
	Purchasing Officer	40.00	60.00	8.33	83.33	8.33	16.67	83.33	0.00	0.00	100.00	0.00	100.00	50.00	50.00		Main Office
	Secretary	65.00	35.00	0.00	100.00	0.00	28.57	71.43	0.00	0.00	100.00	0.00	100.00	50.00	50.00		Main Office
	Welcome Assistant	85.00	15.00	0.00	75.00	25.00	25.00	75.00	0.00	0.00	100.00	0.00	100.00	50.00	50.00		Museums
	Customer Services Manager	80.00	20.00	40.00	40.00	20.00	40.00	60.00	0.00	0.00	100.00	0.00	100.00	100.00	0.00		
	Customer Service Representative	85.00	15.00	50.00	50.00	0.00	50.00	50.00	0.00	0.00	100.00	0.00	100.00				
	Communication Telephone Operator	85.00	15.00	0.00	75.00	25.00	0.00	100.00	0.00	0.00	100.00	100.00	0.00	100.00	0.00		
	Company Driver	55.00	45.00	30.00	70.00	0.00	40.00	60.00	50.00	40.00	10.00	77.78	22.22	83.33	16.67		Main Office

Parking Attendant	95.00	5.00	0.00	100.00	0.00	0.00	100.00	0.00	100.00	0.00	100.00	0.00	100.00	0.00	
Parking Valet	90.00	10.00	0.00	100.00	0.00	0.00	100.00	0.00	100.00	0.00	100.00	0.00	100.00	0.00	
Elevator Technician	90.00	10.00	0.00	100.00	0.00	66.67	33.33	0.00	100.00	0.00	66.67	33.33	66.67	33.33	
Elevator Attendant	84.21	15.79	25.00	75.00	0.00	75.00	25.00	66.67	33.33	0.00	100.00	0.00	100.00	0.00	
Surveillance Officer (CCTV Operation)	80.00	20.00	0.00	100.00	0.00	25.00	75.00	50.00	25.00	25.00	33.33	66.67	100.00	0.00	
Security Guard	30.00	70.00	14.29	78.57	0.00	14.29	85.71	42.86	42.86	14.29	41.67	58.33	85.71	14.29	Main Office and Museums
Disaster Risk Management Officer	60.00	40.00	25.00	62.50	12.50	50.00	50.00	0.00	50.00	50.00	20.00	80.00	83.33	16.67	Main Office
Safety Officer (Maintenance and Engineering)	55.00	45.00	33.33	55.56	11.11	66.67	33.33	0.00	44.44	55.56	20.00	80.00	83.33	16.67	Main Office
Pollution Control Officer	65.00	35.00	42.86	42.86	14.29	71.43	28.57	0.00	14.29	85.71	0.00	100.00	100.00	0.00	
Interior Architect	80.00	20.00		80.00	20.00	40.00	60.00	0.00	0.00	100.00	100.00	0.00	100.00	0.00	
Interior Decorator	90.00	10.00	0.00	66.67	33.33	33.33	66.67	0.00	0.00	100.00	0.00	100.00	100.00	0.00	
Interior Designer	90.00	10.00	0.00	66.67	33.33	33.33	66.67	0.00	0.00	100.00	0.00	100.00	100.00	0.00	
Engineering Aide	60.00	40.00	11.11	77.78	11.11	33.33	66.67	22.22	22.22	55.56	60.00	40.00	75.00	25.00	Main Office
Maintenance Technician	45.00	55.00	45.45	45.45	9.09	45.45	54.55	0.00	72.73	27.27	25.00	75.00	87.50	12.50	Main Office and Museums
Plant Care Technician	85.00	15.00	25.00	50.00	25.00	0.00	100.00	0.00	100.00	0.00	25.00	75.00	100.00	0.00	
Public Area Supervisor	85.00	15.00	33.33	66.67	0.00	33.33	66.67	0.00	66.67	33.33	50.00	50.00	100.00	0.00	
Public Attendant/Public Area Cleaner	70.00	30.00	33.33	50.00	16.67	16.67	83.33	50.00	33.33	16.67	60.00	40.00	100.00	0.00	
Project Development Associate/Officer	80.00	20.00	20.00	60.00	20.00	80.00	20.00	0.00	20.00	80.00	0.00	100.00	50.00	50.00	Main Office
Project Development Manager	85.00	15.00	0.00	75.00	25.00	75.00	25.00	0.00	0.00	100.00	0.00	100.00	50.00	50.00	Main Office
Sales and Marketing Executive/Manager	75.00	25.00	40.00	60.00	0.00	60.00	40.00	0.00	0.00	100.00	0.00	100.00	100.00	0.00	

Sales and Marketing Assistant	75.00	25.00	16.67	66.67	16.67	50.00	50.00	0.00	0.00	100.00	50.00	50.00	50.00	50.00	QC
Sales and Marketing Personnel/Officer	90.00	10.00	0.00	100.00	0.00	0.00	100.00	0.00	0.00	100.00	0.00	100.00	100.00	0.00	
Advertising Manager	80.00	20.00	50.00	25.00	25.00	50.00	50.00	0.00	0.00	100.00	0.00	100.00	100.00	0.00	
Advertising Clerk	90.00	10.00	0.00	66.67	33.33	0.00	100.00	0.00	0.00	100.00	0.00	100.00	100.00	0.00	
Graphic Designer	65.00	35.00	42.86	57.14	0.00	42.86	57.14	0.00	28.57	71.43	0.00	100.00	66.67	33.33	Main Office
Social Media Manager	70.00	30.00	50.00	33.33	16.67	50.00	50.00	0.00	0.00	100.00	0.00	100.00	50.00	50.00	Main Office and Museums
Web Designer	70.00	30.00	28.57	57.14	14.29	42.86	57.14	0.00	14.29	85.71	0.00	100.00	66.67	33.33	Main Office
Video Specialist	85.00	15.00	0.00	75.00	25.00	25.00	75.00	0.00	0.00	100.00	0.00	100.00	50.00	50.00	Main Office
Videographer	75.00	25.00	16.67	66.67	16.67	50.00	50.00	0.00	50.00	50.00	50.00	50.00	75.00	25.00	Main Office
Photographer	75.00	25.00	16.67	66.67	16.67	50.00	50.00	0.00	33.33	66.67	33.33	66.67	75.00	25.00	Main Office
Content Writer	80.00	20.00	0.00	80.00	20.00	60.00	40.00	0.00	20.00	80.00	50.00	50.00	66.67	33.33	Main Office
Brand Ambassador	95.00	5.00	0.00	100.00	0.00	50.00	50.00	0.00	0.00	100.00	0.00	100.00	100.00	0.00	
Handicraft Workers	100.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Cultural Dancer	95.00	5.00	0.00	100.00	0.00	0.00	100.00	0.00	50.00	50.00	50.00	50.00	100.00	0.00	
Translator	80.00	20.00	20.00	60.00	20.00	40.00	60.00	0.00	20.00	80.00	0.00	100.00	66.67	33.33	Main Office
Sign Language Interpreter	85.00	15.00	25.00	50.00	25.00	25.00	75.00	0.00	25.00	75.00	0.00	100.00	100.00	0.00	
First Aid Responder	65.00	35.00	28.57	57.14	14.29	71.43	28.57	14.29	71.43	14.29	16.67	83.33	85.71	14.29	Main Office and Museums
Basic Life Support	75.00	25.00	40.00	40.00	20.00	60.00	40.00	0.00	100.00	0.00	20.00	80.00	100.00	0.00	
Drowning Prevention	85.00	15.00	25.00	75.00	0.00	25.00	75.00	0.00	100.00	0.00	25.00	75.00	100.00	0.00	
Tourism Ethics	80.00	20.00	0.00	100.00	0.00	50.00	50.00	0.00	0.00	100.00	0.00	100.00	50.00	50.00	Main Office and Museums

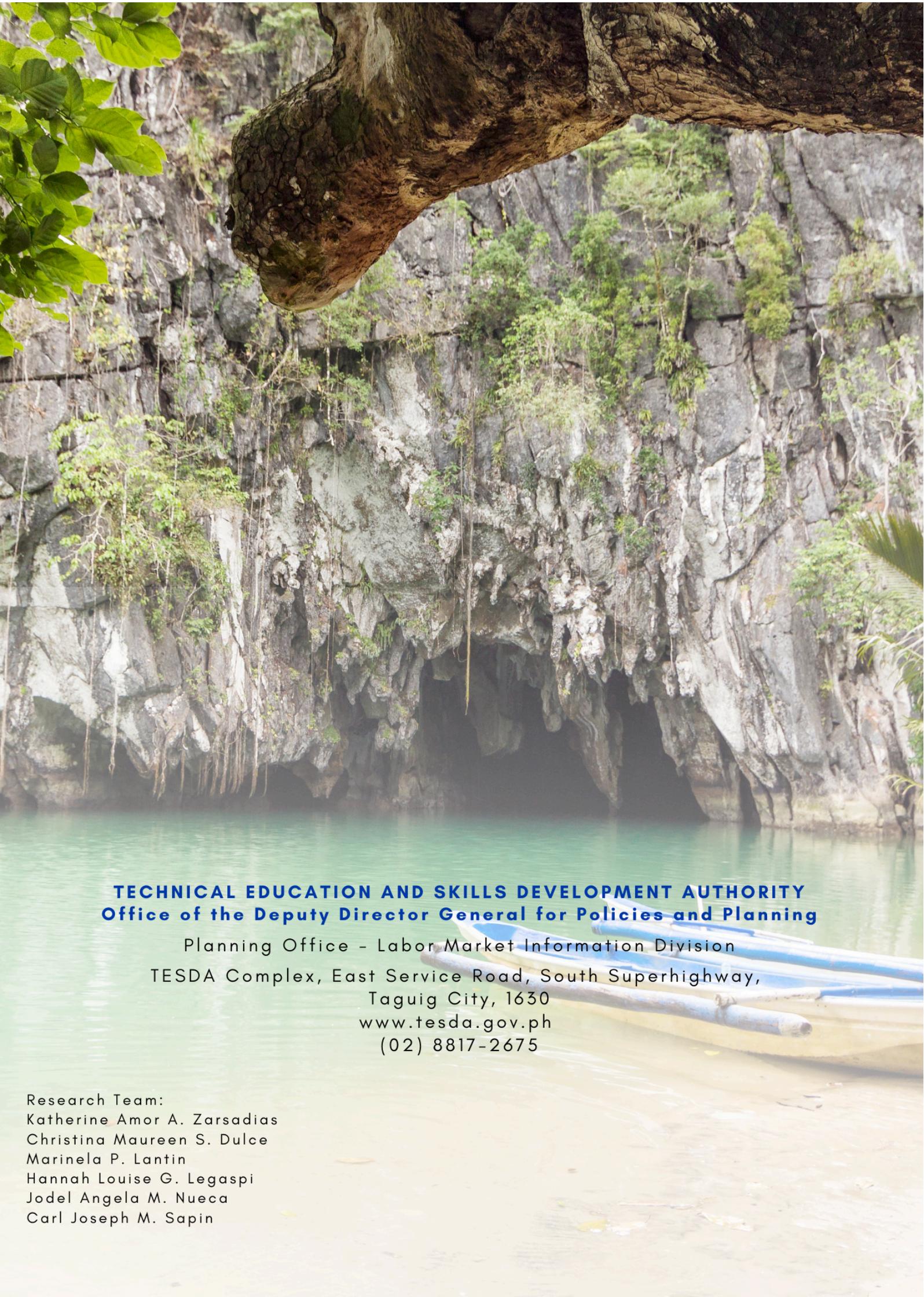
Annex C.

List of Emerging Skills Expected to be More Demanded in the Next Five Years by Tourism Industry

Emerging Skills	Value Chain			
	Accommodation - Hotel	Accommodation - Mabuhay Accommodation	Recreational Activities - Sun and Beach	Tangible Cultural Services - Museum
FOURTH INDUSTRIAL REVOLUTION				
AI and Big Data (e.g., recommender systems in mobile devices)	33.33	33.33	0.00	36.36
Automated Booking System	33.33	0.00	100.00	45.45
Automated Ordering System	33.33	0.00	100.00	18.18
Automated Systems for Front Office Services	33.33	33.33	100.00	36.36
Digital Scanning (i.e. digitization)	33.33	33.33	100.00	54.55
Effective Technology Use (e.g. use of digital platforms)	33.33	33.33	100.00	36.36
Online Market Identification	33.33	33.33	100.00	54.55
Service Robots	0.00	0.00	0.00	18.18
Use of Security Technologies (e.g. CCTV Operation)	16.67	0.00	100.00	36.36
Virtual Reality/ Augmented Reality	16.67	0.00	100.00	45.45
Technology and Digitalization in Tourism	33.33	33.33	100.00	63.64
Future of Tourism in the 4th Industrial Revolution	33.33	33.33	100.00	54.55
Use of Hotel Reservation Platform (e.g., Airbnb)	33.33	0.00	100.00	0.00
NEW NORMAL				
Business Continuity	16.67	33.33	100.00	18.18
Contact Tracing	16.67	66.67	0.00	36.36
Contactless Transaction	33.33	33.33	100.00	45.45
Data Collection	16.67	66.67	100.00	54.55
Product and Services Marketing and Promotions (e.g. Digital Marketing)	33.33	33.33	100.00	45.45
Digital Registration Process	33.33	33.33	100.00	81.82

Digital Technology and Solutions	50.00	33.33	100.00	100.00
Financing Digitization (e.g. Contactless Payment)	33.33	0.00	100.00	45.45
Hygiene Preparedness	33.33	0.00	100.00	18.18
Online Writing	33.33	33.33	100.00	36.36
Remote Work Skills	0.00	0.00	0.00	18.18
Research	16.67	0.00	0.00	45.45
Telework	0.00	0.00	0.00	18.18
Tourism Planning	33.33	0.00	100.00	45.45
Video Production	33.33	0.00	100.00	63.64
STEM (Science, Technology, Engineering, Mathematics)				
Basic Foreign Language (i.e. Chinese, Japanese, Korean)	50.00	66.67	100.00	54.55
Brewers	0.00	33.33	100.00	0.00
Chemical Handling	33.33	0.00	100.00	18.18
Effective Communication of Biodiversity, Natural, and Cultural Assets	33.33	66.67	100.00	45.45
Knowledge and Information Sharing	16.67	33.33	100.00	45.45
Museums/Zoos/Aquariums Personnel	0.00	33.33	0.00	45.45
Nature Interpretation and Guiding	0.00	33.33	100.00	36.36
Nature Photography	0.00	33.33	100.00	27.27
Parks and Gardens Rangers	0.00	66.67	0.00	9.09
Pastry and Specialty Chefs	50.00	0.00	100.00	9.09
Sign Language Interpretation	33.33	66.67	100.00	63.64
Other Industry Developments (e.g Philippine laws, code, roadmap)				
Complaints Handling	50.00	0.00	100.00	27.27
Crisis Management (e.g., Mental Health Awareness, Disaster Risk Reduction and Management)	50.00	33.33	100.00	72.73
Customer Relationship Management	33.33	0.00	100.00	45.45
Destination Resilience	33.33	33.33	100.00	18.18
Effective Customer Service/Customer Engagement Skills	16.67	0.00	100.00	36.36

Emergency Preparedness and Resiliency	66.67	33.33	100.00	54.55
Emergency Response System	66.67	33.33	100.00	72.73
Financial, Pricing, and Revenue Management	50.00	0.00	100.00	18.18
Inclusive Tourism (Cultural Sensitivity)	66.67	33.33	100.00	54.55
Inclusive Tourism (Gender Sensitivity)	66.67	33.33	100.00	45.45
Barrier Free Tourism - Accessibility (PWD Facilitation)	66.67	33.33	100.00	54.55
Muslim-friendly tourism (e.g., Halal Tourism)	66.67	33.33	100.00	36.36
Tourism Product Development	66.67	0.00	100.00	36.36
Product and Services Design	66.67	0.00	100.00	45.45
Product and Services Packaging	66.67	0.00	100.00	27.27
Safety and Health Protocols/ Occupational Safety	66.67	0.00	100.00	45.45
Sustainable Tourism Governance (in light of the Mandanas Ruling Implementation)	66.67	33.33	0.00	54.55
Visitor Management	33.33	33.33	100.00	54.55
Filipino Brand of Service Excellence	33.33	33.33	100.00	63.64
Destination Marketing and Promotions	50.00	33.33	100.00	54.55
Tourism Branding and Marketing	50.00	33.33	100.00	54.55
Tourism Trends and Forecasts	50.00	33.33	100.00	54.55



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