TOURISM
AND
ECONOMIC DEVELOPMENT

LABOR MARKET INTELLIGENCE REPORT

Technical Education and Skills Development Authority

August 2016

I. BACKGROUND

With the continuing internationalization of trade, complemented by the harmonization of the governance structure and policy environment of various countries, tourism has become a potent tool for economic development. Countries lacking in investment opportunities now stand to leverage their comparative advantage through increased investment in tourism. Along with the expansion of the sector is the increased demand labor necessary for the delivery of its products and services.

With the development opportunities emanating from tourism, the existing talent pool would be inadequate, as far as global statistics are concerned. Data indicate that globally, there is a substantial deficit in the supply of skills, which have economic costs that far outweigh the benefits of tourism expansion. However, the case of the Philippines is different having an oversupply, according to the World Travel & Tourism Council. If remain unaddressed, the demand-supply disconnect will cause the country unrealized economic benefits. It is therefore imperative for various stakeholders to establish a collaborative effort to institutionalize reforms in the industry, in accordance with the demands of internationalization and domestic human resource development, in order to encourage professionals and students to pursue a career in tourism.

II. TOURISM INDUSTRY: A PICTURE OF VIBRANCY

Global Perspective

Based on the 2015 report of the United Nations World Tourism Organization (UNWTO), tourism contributes a significant 9 percent of the world's gross domestic product (GDP). The GDP contribution of the sector is quantified either as direct, indirect or induced impact. In terms of global employment, in 2014 it was recorded that 1 in every 11 jobs is under the tourism sector. The volume of international arrivals also soared from 1.087 billion in 2013 to 1.133 billion in the following year. This particular figure is essential insofar as measuring the success of tourism development is concerned. Revenues generated externally, in the form of visitors exports, are an important part for economic stability. As per UNWTO's methodology, this is measured by international tourism receipts, which in 2014 amounted to USD 1.245 trillion (a 3.7% increase in real terms from the preceding year level). Domestic tourism remains an occupant of the larger bulk of arrivals with five to six billion visitors.

Table 1 shows the top ten countries having the highest number of international arrivals in 2014 while Table 2 shows the leading countries in terms of international tourist receipts.

Table 1. International Arrivals of Top Ten Countries: 2013-2014

International Tourist Arrivals					
Rank	Series	Million		Change (%)	
		2013	2014*	13/12	14*/13
1 France	TF	83.6	83.7	2.0	0.1
2 United States	TF	70.0	74.8	5.0	6.8
3 Spain	TF	60.7	65.0	5.6	7.1
4 China	TF	55.7	55.6	-3.5	-0.1
5 Italy	TF	47.7	48.6	2.9	1.8
6 Turkey	TF	37.8	39.8	5.9	5.3
7 Germany	TCE	31.5	33.0	3.7	4.6
8 United Kingdom	TF	31.1	32.6	6.1	5.0
9 Russian Federation	TF	28.4	29.8	10.2	5.3
10 Mexico	TF	24.2	29.1	3.2	20.5

Source: World Tourism Organization (UNWTO) ©

Table 2 Top Ten Countries in Terms of International Tourism Receipts: 2013-2014

Rank	US$				Local Currencies	
	Billion		Change (%)		Change (%)	
	2013	2014*	13/12	14*/13	13/12	14*/13
1 United States	172.9	177.2	7.0	2.5	7.0	2.5
2 Spain	62.6	65.2	7.6	4.2	4.1	4.2
3 China	51.7	56.9	3.3	10.2	1.4	9.2
4 France	56.7	55.4	5.6	-2.3	2.1	-2.3
5 Macao (China)	51.8	50.8	18.1	-1.9	18.1	-1.9
6 Italy	43.9	45.5	6.6	3.7	3.1	3.7
7 United Kingdom	41.0	45.3	12.1	10.3	13.2	4.8
8 Germany	41.3	43.3	8.2	5.0	4.7	4.9
9 Thailand	41.8	38.4	23.4	-0.8	22.1	-2.7
10 Hong Kong (China)	38.9	38.4	17.7	-1.4	17.7	-1.5

(Data as collected by UNWTO May 2015)

The impact of the internationalization of trade in services on the flourishing of the sector is also noteworthy as evidenced by the fact that the volume of international tourist arrivals has increased by more than 400% from its level half a century ago, from 25 million in 1950 to 1.133 billion in 2014. Innovations must be constantly pursued to sustain this direction and further gain growth in view of the fact the globalization has taken a different expression starting 21^{st} century. Structural adjustments in terms of governance structure and policy environment have been implemented by various states and with these, the tourism sector has a crucial role to take. Services and products as well as the physical and human infrastructures must be leveraged to realize the economic, social and political benefits of internationalization.

Figure 1. World Tourism Key Figures

Source: UNWTO Tourism Highlights 2015

World Tourism Key Figures

9% of GDP- direct, indirect and induced impact

1 in 11 jobs

US$ 1.5 trillion in exports

6% of the world's exports

From 25 million international tourists in 1950

to 1133 million in 2014

5 to 6 billion domestic tourists

1.8 billion international tourists forecast for 2030

The seemingly uninterrupted expansion of the tourism sector is projected to last for a substantial period of time- an opportunity seen by many for the emerging economies to capitalize on to leverage its comparative advantage against that of the developed states. UNWTO projects the volume of international arrivals to reach 1.8 billion in 2030, or a 3.3 % increase annually from the present year. The forecasted increase in tourist arrivals will result in the consequent increase in global GDP and employment share. Other key trends and outlook from UNWTO are provided in Figure 1.

ASEAN Perspective

UNWTO reported a moderate number in the industry in Southeast Asia. After several years of rapid and robust growth, the region only registered a conservative 3% growth in 2014. This is a largely a result of political turmoil in main destination countries such as Thailand, which recorded a -7% growth. Other countries, nevertheless, registered a strong performance such as Myanmar (51%) primarily because of the political impression of restored democracy and economic order. Malaysia, Indonesia and Cambodia logged a similar 7% increase, while Vietnam saw a 4% increase and Singapore, a flat growth rate. Philippines, for its part, recorded a 3.2% increase.

The institutionalization of the Mutual Recognition Agreement (MRA) on Tourism in 2012 among the ASEAN countries can be a potent tool to propel regional tourism back to its height. A discussion of this is provided on the MRA section.

Philippine Perspective

The Philippines boasts a number of the finest tourist spots in the world but has lagged beyond its ASEAN neighbors because of the existing policy environment and good governance issues. The 2015 Annual

Report of the World Travel and Tourism Council (WTTC) reveals that the direct[1] and total[2] contributions of tourism in the Philippines to its GDP in 2014 are both below the world average at US$12 billion (world average is US$19.4 billion) and US$31.8 billion (world average is US$58.3 billion), respectively.

Table 3 Travel and Tourism's Direct Contribution to GDP (2014)

	Travel and Tourism's Direct Contribution to GDP	2014 (US$bn)
2	China	263.0
12	Australia	38.6
14	Thailand	31.9
17	Indonesia	27.5
	Asia Pacific Average	21.7
	World Average	19.4
23	Malaysia	18.6
31	Singapore	14.8
36	**Philippines**	12.0
43	Vietnam	8.6
63	Sri Lanka	3.5
74	Cambodia	2.3
		World Average: US$ 19.4 bn

Source: Travel & Tourism Economic Impact 2015, Philippines

Table 4 Travel and Tourism's Total Contribution to GDP (2014)

	Travel and Tourism's Direct Contribution to GDP	2014 (US$bn)
2	China	943.1
11	Australia	145.7
17	Thailand	79.8
18	Indonesia	72.2
	Asia Pacific Average	67.3
	World Average	58.3
26	Malaysia	49.2
36	**Philippines**	31.8
37	Singapore	30.4
51	Vietnam	17.3
65	Sri Lanka	8.2
83	Cambodia	5.1
		World Average: US$ 58.3 bn

Source: Travel & Tourism Economic Impact 2015, Philippines

In 2014, Philippines ranked 53rd in capital investment and 49th in visitor exports[3]. Specifically, the Philippines generated Php 92.4 (US$ 2.1 Billion) in investment. The visitor exports, on the other hand, amounted to Php 255.7Billion (US$ 5.8 Billion). This is expected to rise by 3.3% in 2015, and rise by 4.8% per annum over the next ten years to PHP151.9 billion in 2025. Below is a table showing the aforementioned data vis-à-vis other countries' standing.

Table 5 Travel and Tourism's Capital

	Travel and Tourism's Capital Investment	2014 (US$bn)
2	China	136.8
10	Australia	18.4
13	Indonesia	14.1
14	Singapore	13.8
	Asia Pacific Average	9.5
20	Thailand	7.2
25	Malaysia	5.9
32	Vietnam	4.6
	World Average	4.5
53	Philippines	2.1
68	Sri Lanka	0.9
93	Cambodia	0.4

Source: Travel & Tourism Economic Impact 2015, Philippines

Table 6 Travel and Tourism's Visitor Exports

	Travel and Tourism's Capital Investment	2014 (US$bn)
3	China	60.8
10	Thailand	40.3
14	Malaysia	22.6
20	Singapore	18.9
21	Australia	18.8
	Asia Pacific Average	12.4
32	Indonesia	11.2
39	Vietnam	7.8
	World Average	7.5
49	**Philippines**	5.8
59	Sri Lanka	3.5
60	Cambodia	3.2

Source: Travel & Tourism Economic Impact 2015, Philippines

When it comes to visitor arrivals, the Federation of Filipino Chinese Chambers of Commerce & Industry, Inc. (2015), citing the Department of Tourism (DOT), says that the Philippine tourism industry had a total of 5,360,682 visitors in 2015- a 10.91% growth from the 4,833,368 visitors in 2014. This excellent performance of the industry is said to have come as a result of the intensified marketing, the influx of visitors during the Christmas holidays, as well as the international media exposure of the country in major international events such as the visit of Pope Francis, APEC 2015 meetings and other tourism events.

[1] The direct contribution of Travel & Tourism to GDP reflects the 'internal' spending on Travel & Tourism (total spending within a particular country on Travel & Tourism by residents and non-residents for business and leisure purposes) as well as government 'individual' spending - spending by government on Travel & Tourism services directly linked to visitors, such as cultural (eg museums) or recreational (eg national parks).- Travel & Tourism Economic Impact 2015, Philippines (WTTC)

[2] The total contribution of Travel & Tourism includes its 'wider impacts' (ie the indirect and induced impacts) on the economy. The 'indirect' contribution includes the GDP and jobs supported by: Travel and tourism investment spending, government 'collective' spending and domestic purchases of goods and services by the sectors dealing directly with tourists. - Travel & Tourism Economic Impact 2015, Philippines (WTTC)

[3] Money spent by foreign visitors to a country

On Employment Share

In terms of employment share, the country registered above the world average rates, highlighting its identity as a service economy. The direct and total contributions to employment stands at 1,259, 800 (world average is 827,000), 3.3% of total employment, and 4,231,900 (world average is 2,076,600) jobs, respectively. The former includes employment by hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). It also includes, for example, the activities of the restaurant and leisure industries directly supported by tourists.

Table 7 Travel and Tourism's Direct Contribution to Employment (2014)

Travel and Tourism's Direct Contribution to Employment		2014 '000 jobs
1	China	23160.0
5	Indonesia	3325.8
8	Thailand	2210.2
	Asia Pacific Average	2000.0
9	Vietnam	1963.5
13	Philippines	1259.8
17	Cambodia	985.4
	World Average	827.0
24	Malaysia	724.3
32	Australia	504.6
41	Sri Lanka	351.9
68	Singapore	152.7

Source: Travel & Tourism Economic Impact 2015, Philippines

Table 8 Travel and Tourism's Total Contribution to Employment (2014)

Travel and Tourism's Total Contribution to Employment		2014 '000 jobs
1	China	66086.2
4	Indonesia	9813.9
7	Thailand	5382.9
	Asia Pacific Average	4673.9
10	Philippines	4231.9
12	Vietnam	4088.6
20	Cambodia	2221.5
	World Average	2076.6
24	Malaysia	1769.9
29	Australia	1415.8
42	Sri Lanka	819.6
84	Singapore	302.9

Source: Travel & Tourism Economic Impact 2015, Philippines

As shown in Table 9, WTTC projects a continuing tourism growth for the country. Direct GDP contribution is predicted to have an average 5.6% growth for the years 2015-2025 while the total GDP contribution is projected to have an average 5.7% in the same period. Direct and total employment contributions are projected to have an identical average growth rate of 2.6 %. International tourist receipt is predicted to grow by 6.6 % in the next 10 years and 4.8 % for investments.

Table 9 Estimates and Forecasts (2014)

Philippines	2014 US$mn[1]	2014 % of total	2015 Growth[2]	US$mn[1]	2025 % of total	Growth[3]
Direct contribution to GDP	12,005.3	4.2	5.0	21,711.4	4.4	5.6
Total contribution to GDP	31,782.1	11.2	5.0	58,149.6	11.6	5.7
Direct contribution to employment[4]	1,259.8	3.3	2.6	1,667.4	3.3	2.6
Total contribution to employment[4]	4,231.9	11.1	2.5	5,613.3	11.3	2.6
Visitor exports	5,759.5	7.9	-0.3	10,929.0	10.5	6.6
Domestic spending	17,680.8	6.2	6.5	30,857.8	6.3	5.1
Leisure spending	16,721.1	3.0	3.9	30,009.9	3.2	5.6
Business spending	6,719.2	1.2	7.	11,776.9	1.2	5.0
Capital investment	2,081.2	3.6	3.2	3,422.3	3.2	4.8

[1]2014 constant prices $exchange rates [2]2015 real growth adjusted for inflation(%) [3]2015-2025annualled real growth adjusted for inflation(%) [4]000 jobs

Source: Travel & Tourism Economic Impact 2015, Philippines

From these figures, we develop an understanding that while the Philippine tourism sector has been growing substantially, the government, private sector and other stakeholders must undertake more aggressive policies and programs aimed at capitalizing on the opportunities brought by internal and external factors.

III. DEMAND-SUPPLY DISCONNECT

The Philippine experience is unique relative to the global landscape as there is still a surplus of skill. In fact, WTTC reports that the country leads three other states (India, Norway and Bahrain) having a skill surplus. Table 10 shows the demand-supply of talent balance in the tourism sector while Table 10 compares the sector with that of the total economy. As can be seen from the figures, countries outside of the Philippines, India, Norway, Bahrain, Egypt, Australia, Germany and Colombia all registered a deficit in the human resource for the tourism sector.

Table 10. Balance between demand for and supply of talent in the Travel and Tourism Sector versus Total Economy (2014-2024)

	Travel and Tourism, All education levels, Long-run (2014-2024)	Total Economy, All Education levels, Long-run (2014-2024)
Philippines	0.3	0.8
India	0.3	0.5
Norway	0.1	0.2
Bahrain	0.1	-0.3
Egypt	0.0	0.2
Australia	0.0	0.3
Germany	0.0	0.3
Colombia	0.0	0.5
Brazil	-0.1	1.1
Barbados	-0.4	0.7
Indonesia	-0.3	0.3
South Africa	-0.4	0.5
Morocco	-0.4	0.7
China	-0.5	0.6
UAE	-0.4	0.7
US	-0.5	0.5
Canada	-0.5	0.6
Japan	-0.6	0.4
Mexico	-0.6	0.9
Chile	-0.6	-0.3
Saudi Arabia	-0.5	0.6
Qatar	-0.6	0.1
Spain	-0.7	-0.4

France	-0.8	0.5
Bermuda	-0.8	-0.2
UK	-0.8	0.2
South Korea	-0.9	0.0
Czech Republic	-0.9	0.2
Austria	-0.9	0.6
Kuwait	-0.7	0.4
Netherlands	-0.9	0.3
Switzerland	-1.0	0.4
Oman	-0.8	1.2
Malaysia	-0.9	0.0
Greece	-1.1	-0.4
Turkey	-1.1	1.2
Italy	-1.5	0.3
Singapore	-1.6	-0.7
Sweden	-1.6	0.5
Argentina	-1.5	0.3
Costa Rica	-1.6	0.2
Peru	-1.6	0.2
Russia	-2.3	0.3
Taiwan	-2.2	0.9
Poland	-2.7	0.3
Thailand	-3.7	0.0

Source: Oxford Economics, WTTC

To develop an understanding of the industry's global standing, it is essential to discuss the three possible types of talent imbalance, identified by WTTC:

1) Shortage or surplus of specific occupations such as chefs and pilots
2) Shortage or surplus of job-specific skills such as use of foreign language and IT expertise; and
3) Shortage or surplus of certain soft skills such as customer service and problem- solving.

The said international organization opines that the tourism sector has unique characteristics that make recruitment and retention of talent and skills an arduous task. These sectoral features include:

- *Career Longevity*

The seasonal nature of the tourism industry makes it uneconomical to chart a year-long full-time employment, which the other industry such as retail can provide. This also leads to the impossibility of clear staff pathways. Moreover, the geographical setting of most tourism facilities also discourages recruitment. The lack of local housing and access rounds further compound the problem. Lastly, the relatively easier entry to the sector can also have a pitfall since it creates an impression that the jobs available are low-paid, menial and low skilled, which is a negative perception for those seeking career longevity.

- *Competition*

The impression of the industry as an infertile soil for career growth also places it in an unfavourable competitive position. With the scarcity of talent and skills, prices of professional service also rise. Different sectors will compete to get the best talents in the pool for its economic success. Choosing between a career path that is seasonal and that which is stable, most professional will choose the latter.

- *Retention*

According to the WTTC survey of member companies, the average annual staff turn-over is eighteen percent (18%). In response to this, recruitment has been made to be more flexible and on-going.

- *Uncompetitive Pay Package*

WTTC member companies pointed out the general tendency of applicants to demand higher compensation than what is necessary or bearable for the firm. The backlog in terms of the availability of applicants, coupled with uncompetitive pay, place the sector in a disadvantaged position.

- *Education Supply*

Most countries lack tourism courses in universities primarily due to the lack of qualified and competent educators and trainers. In countries where tourism courses are offered, more often than not, the curricula are not aligned with the evolving global landscape such as the internationalization of trade and services. As a result, graduates of tourism and related courses often lack the required knowledge and skills for global competitiveness. They end up being designated in menial transient jobs while the higher technical positions are filled with locals who gained an education or training abroad, or by foreigners.

- *Gender Dimension*

Certain jobs in the industries have long been gender-specific. There must be redefinition of normative standards to these jobs in order for the opposing genders to likewise have the opportunity to be employed in jobs traditionally seen as not theirs.

- *Governance Structure and Policy Environment*

Government attention must be redirected towards striking a balance between investing in physical infrastructures and developing an equipped human resource. The present thrust is heavily skewed towards the former. Policies against foreign employment must likewise be eased, if not totally abrogated to enable countries to source their skill requirement from other countries. ASEAN has already crafted an enabling framework for the facilitation of talent flow through the promulgation of MRA.

IV. Economic Cost of Demand-Supply of Talent and Skills Imbalance

The inadequacy of talent and skills to fuel the sector produces economic costs such as below optimal employment level in the short-run and foregone investment in the long term. A basic economic theory known as the production possibility frontier states that an economy is producing efficiently when it is utilizing all its resources for production. In the case of demand-supply imbalance in the talent and skills required by the tourism industry, below optimal employment level is considered as idle resources. According to WTC, the specific economic costs of the talent imbalance are as follows:

- The shortage of talent and skills can result in the permanent vacancies of hard-to-fill jobs (those that require hard skills such as technical expertise). What are lost in the process are unrealized economic potentials and foregone revenues (in the form of taxes) and investment.
- The sectoral characteristics of tourism that make it unattractive for professionals and blue-collar workers put it in an economic disadvantage. The scarcity of talent and skills drives up wages, which will be inimical to firms as it increases production cost.
- The backlog in the talent and skill might compel companies to hire under-qualified and under-experienced staff just to fill the immediate needs but in the process, compromising the quality of services especially on job satisfaction and efficiency.
- Corollary to the aforesaid economic cost is the possibility of also utilizing foreign employment to address the human resource needs of the company. The indigenous identity of the products and services, which is an essential characteristic of the tourism industry, is eroded.
- The high staff turn-over and seasonal nature of the tourism industry limit its ability to deliver services and produce outputs in a sustained manner. High turn-over necessitates higher recruitment expenses, new training costs and related expenses.

The opposite of the above economic costs (that which is a result of skill and talent surplus) also produces negative effects. The oversupply of labor, on the contrary, drives down wage and diminishes career progression- the seeming case of the Philippines.

On the issue of oversupply and insufficient job opportunities in the country, DOLE, in March 2016, said that Filipino applicants' lack of skills, not lack of jobs, is what hounds the country's labor market as only 10 out of 1,000 applicants are getting hired on the average. Furthermore, the labor department posits that *"the vacancies are really out there waiting for the qualified job applicants. Our biggest problem is the jobs and skills mismatch. It is only now that we're aligning our education and training systems with the industry requirements using international benchmarked standards*." Definitely, the unemployed persons supposedly working in the tourism sector means unrealized economic benefits not just for the persons but for the economy as a whole.

Local human resources conglomerate Servicio Filipino Inc. (SFI) said data from the group's operations in the past five years showed only 1% of 1,000 applicants are actually being hired by companies. It appears that the problem lies in finding the right people who qualify with the right skills and credentials.

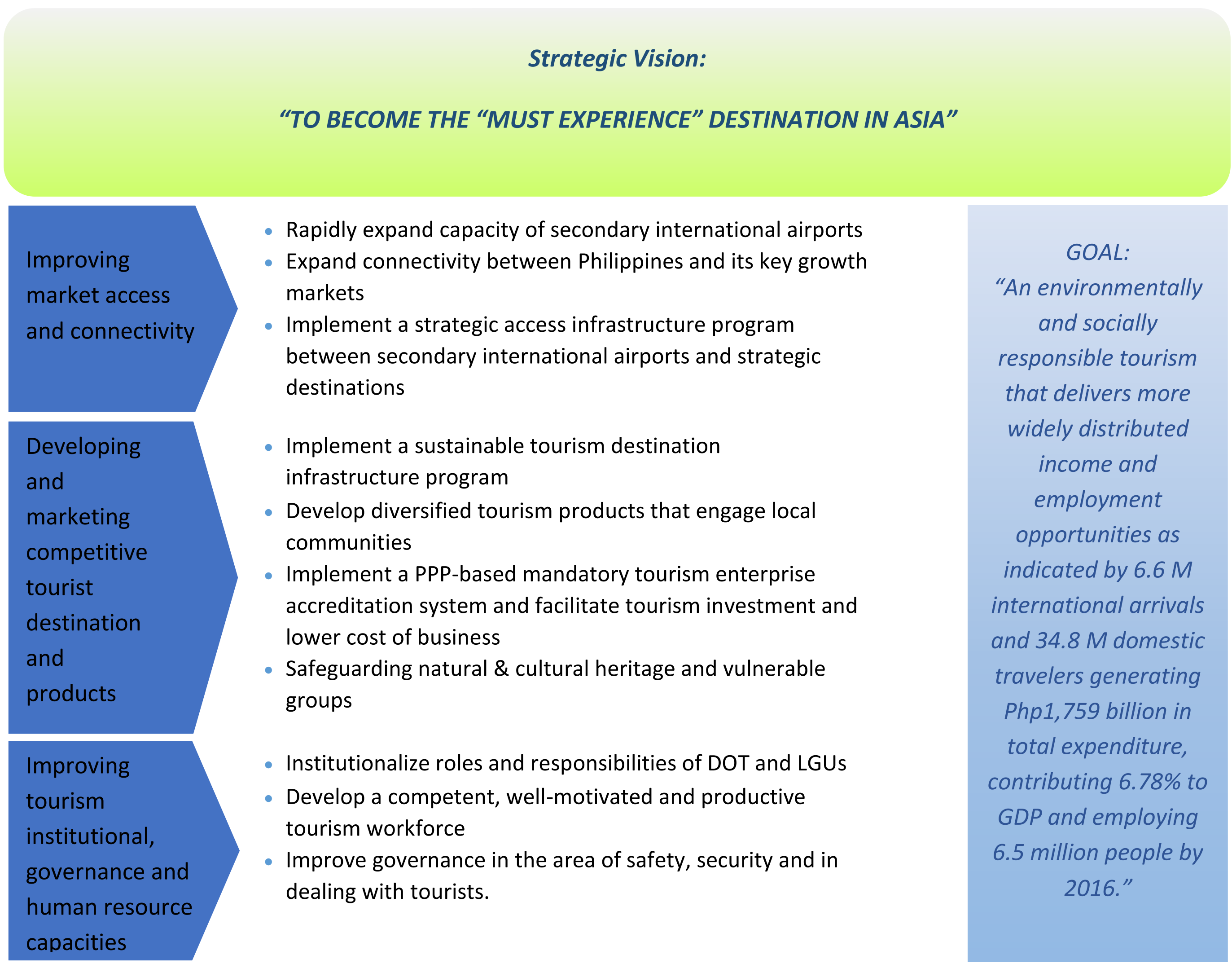
V. EFFORTS IN ADDRESSING THE CONCERNS OF THE SECTOR

A. TOURISM DEVELOPMENT PLAN

As a preliminary step towards addressing the concerns of the sector, the government spearheaded the formulation of The Philippine National Tourism Plan (NTDP). The plan is intended to provide a strategic framework and outline action plan to guide the Department of Tourism (DOT) and other stakeholders in the development of the tourism sector between 2011 and 2016. It is aimed at enhancing the competitiveness of the Philippine tourism sector by focusing on marketing diverse and high quality destinations and products, improving international and domestic access and connectivity and destination infrastructure, and addressing policy and institutional reforms, and improving tourism human resource skills and capabilities.

The figure below gives a snapshot of the stakeholder-based goal and targets, overall vision, and based on addressing the challenges, the strategic directions and actions that the Philippines should take to achieve these.

Figure 2. NTDP Vision and Goal.



The plan provided core actions which will be coordinated and undertaken both at the national and regional level:

1. Improving Market Access & Connectivity
2. Developing and marketing competitive destinations and products
3. Strengthening institutional governance and human resource capacities

While much have been done over the past years, much of the work to clear barriers in developing and marketing more competitive and inclusive destinations and products remains to be achieved. In particular, international access and connectivity, developing sustainable and inclusive destinations and products, and policy and institutional and tourism human resource development remain major barriers in raising the competitiveness of the Philippine tourism sector. With this, the NTDP 2016-2022, which is currently being drafted, was initiated. It seeks to build and upscale the implementation of tourism programs through a focused and prioritized approach designed to deliver a more competitive, sustainable and inclusive tourism sector.

B. Mutual Recognition Agreement: A Tool to Redefine Tourism as a Career Path

Background

Philippines became a party to the MRA in 2012. The MRAs are arrangements between two or more parties to mutually recognize or accept some or all aspects of one another’s conformity with assessment results. One of the objectives of the Mutual Recognition Arrangement on Tourism Professionals (MRA-TP) is to ease the mobility of tourism professionals within ASEAN based on a competency-based tourism qualification/certificates. The MRA was signed by the ASEAN Member States on January 6, 2009 in Hanoi, Vietnam. The objectives are:

a) To facilitate mobility of Tourism Professionals/ Workers;
b) To exchange information on best practices in competency-based education and training for Tourism Professionals; and
c) To provide opportunities for cooperation and capacity building across ASEAN Member States.

The MRA Infrastructure (see figure 3) shows that it is governed at the regional level by the ASEAN Tourism Professional Monitoring Committee (ATPMC) and the ASEAN Tourism Professional Registration System (ATPRS). At the national level it is governed by the National Tourism Professional Board/Agency (NTPB) and the Tourism Professional Certification Board (TPCB). The ATPMC consists of the ASEAN National Tourism Organizations (NTOs) and appointed representatives from the National Tourism Professional Boards (NTPBs). One of its responsibilities is to facilitate the exchange of information concerning assessment procedures, criteria, systems, manuals and publications relating to the MRA.

Figure 3 The MRA Infrastructure

REGIONAL LEVEL
1. ASEAN Tourism Professional Monitoring Committee (ATPMC)
2. ASEAN Tourism Professional Registration System (ATPRS)
NATIONAL LEVEL
1. National Tourism Professional Board/Agency
2. Tourism Professional Certification Board (TPCB)

MRA-TP offers a multitude of benefits which are provided below:

- For governments, MRAs ensure commitment and agreement to international trade, and encourage the sharing of good practices and information between and among partners. This can lead to:
  - ✓ Reduced costs;
  - ✓ Increased competitiveness;
  - ✓ Increased market access; and
  - ✓ Freer flow of trade.

- For tourism professionals and the industry, MRAs provide the following benefits:
  - ✓ Facilitate mobility of tourism professionals based on the tourism competency qualification/ certificate
  - ✓ Enhance conformity of competency based training/education
  - ✓ Recognize skills of tourism professionals
  - ✓ Improve the quality of tourism human resources producing work/job-ready graduates
  - ✓ Enhance the quality of tourism services

- For education and training providers, MRAs provide the following benefits:
  - ✓ A clear set of standards for development of training programs
  - ✓ A competency-based training and assessment system for preparing trainees for the tourism industry
  - ✓ A range of job-based tourism qualifications based on common labor divisions
  - ✓ An opportunity to become one of the preferred education and training providers for the range of ASEAN Common Competency Standards for Tourism Professionals (ACCSTP) qualifications.

In the Philippines, the following are the key stakeholders in the Philippines that are collaborating in the successful implementation of the MRA- TP in the Philippines:

- The DOT takes the lead as the National Tourism Organization (NTO) and represents the Philippines in the ATPMC. One of its responsibilities as NTO is to develop, coordinate and implement work programs/plans to enhance cooperation in tourism. Moreover, as NTO it provides mechanism to promote participation from the private or business sector and non-government organizations.

- TESDA is the lead as TPCB. The TPCB is primarily responsible in the assessment of qualifications and/or competencies of tourism professionals as specified in the ASEAN Common Competency Standards for Tourism Professionals (ACCSTP). Moreover, it issues certificates to tourism professionals whose qualifications and/or competencies comply with the ACCSTP; and develops, processes and maintains a registry of certified tourism professionals and job opportunities. Lastly, the TPCB notifies the NTPB when foreign tourism professionals are no longer qualified or have violated any technical, professional or ethical standards.

- The Tourism Industry Board Foundation, Inc. (TIBFI) is the NTPB. The NTPB refers to the Board for Tourism Professionals composed of representatives from the public and private sectors including the academia and other relevant tourism stakeholders as identified by the NTO. The NTPB is responsible in creating awareness and disseminating information about the ASEAN MRA. It is, likewise, responsible to promote, update, maintain and monitor the ACCSTP and the Common ASEAN Tourism Curriculum (CATC). Moreover, it is responsible to facilitate the exchange of information on assessment procedures, criteria, systems, manuals and publications relating to the MRA, and the exchange of best practices in the tourism sector.

The Key Elements of MRA – TP

Every organization consists of different individuals that possess different responsibilities that are essential to attain the groups' aim. ASEAN MRA-TP, as an initiative of the ASEAN countries, has its key elements as follows:

a) The *ASEAN Tourism Professional Monitoring Committee (ATPMC)* consists of ASEAN National Tourism Organizations (NTOs) and appointed representatives from the National Tourism Professional Boards (NTPBs).

b) The *ASEAN Tourism Professional Registration System (ATPRS)* is a web-based facility to disseminate details of certified Foreign Tourism Professionals within ASEAN.

c) The National Tourism Professional Board (NTPB) refers to the Board for Tourism Professionals composed of representatives from the public and private sectors (including academia and other relevant tourism stakeholders) to be determined by the respective ASEAN NTOs.

d) The Tourism Professional Certification Board (TPCB) refers to the government board and/or agency authorized by the government of each ASEAN Member State primarily responsible for the assessment and certification of Tourism Professionals.

e) Tourism Professional refers to a person who holds the nationality of an ASEAN Member State certified by the Tourism Professional Certification Board.

f) The ASEAN Common Competency Standards for Tourism Professionals (ACCSTP) refers to the minimum requirements of competency standards in hotel and travel services which aim to upgrade tourism services and facilitate the development of MRA between ASEAN Member States.

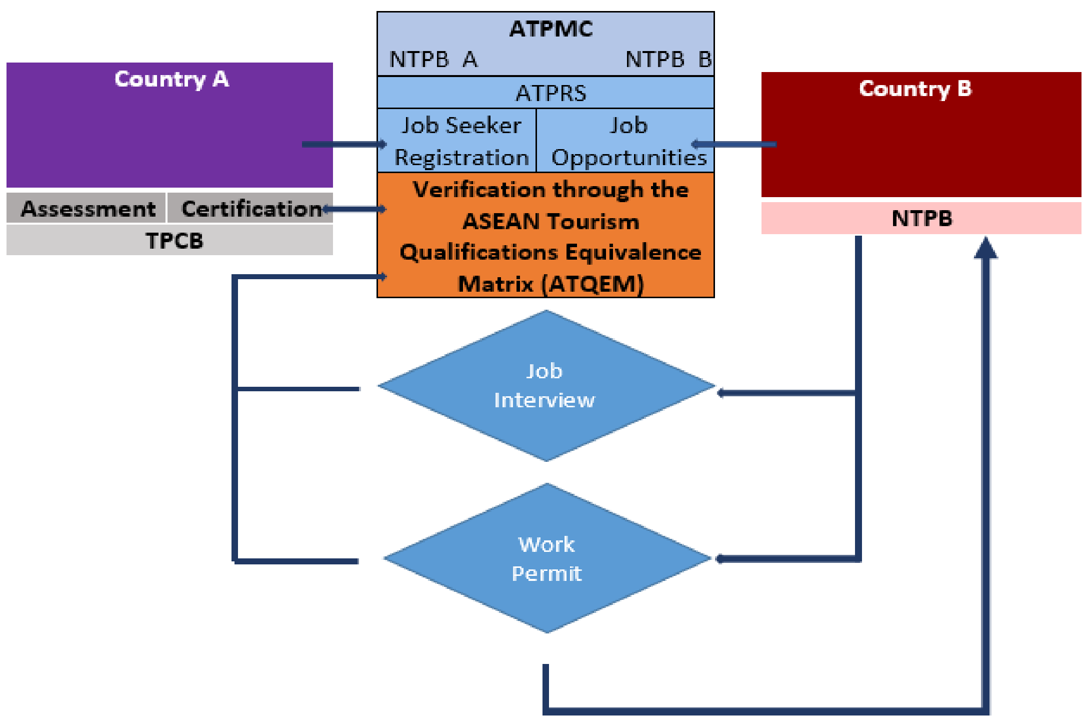
g) The Common ASEAN Tourism Curriculum (CATC) refers to the common curriculum for ASEAN Tourism Professionals as mutually agreed upon by the ASEAN Tourism Ministers upon recommendation by the ASEAN NTOs.

h) Assessment refers to the process of appraising the qualification and/or competencies of Tourism Professionals.

i) Certification refers to the issuance of a certificate to the Tourism Professional whose qualification and/or competencies have met the standards specified in ACCSTP.

j) Verification is the means by which a certificate or qualification is checked against ACCSTP to ensure its compatibility and validity.

Figure 4. Schematic Outline of ASEAN MRA on Tourism Professional Mechanism



Analysis

As discussed on the earlier part of this report, there exists a scarcity of skills and talents in most countries. Thailand is an example of a state that has an imbalance (-3.7 as per WTTC analysis) and a negative tourism growth for 2014 (-7% based on UNWTO report). The scarcity can either be a result of demographic configuration (ageing population thus, lacking manpower) or structural problems such as job-skill mismatch. In both cases, a mechanism is necessary to institutionalize the free flow of technology transfer and knowledge exchanges. It is in this line of reasoning that the institutionalization of MRA appears to be of paramount importance. Thailand, for instance, may seek the help of its neighbors to effectively adjust some of its fundamental economic operations or utilize foreign employment. The country may tap the skill and talent surplus of the Philippines to address its backlog. Theoretically, therefore, MRA is envisioned to be a mechanism that establishes trade, services and human resource equilibrium in the region.

With MRA in place, the problems associated with either the surplus or deficit of talent and skill can already be addressed. What is left for policymakers is to identify key areas of internationalization that can be of valuable use to the tourism development and promulgate new or amend existing rules to institute the said alignment. Job requirements must be elevated to highlight technical professions and vocational jobs with gainful compensation to attract professionals and ultimately, change the perception of tourism as an infertile career path.

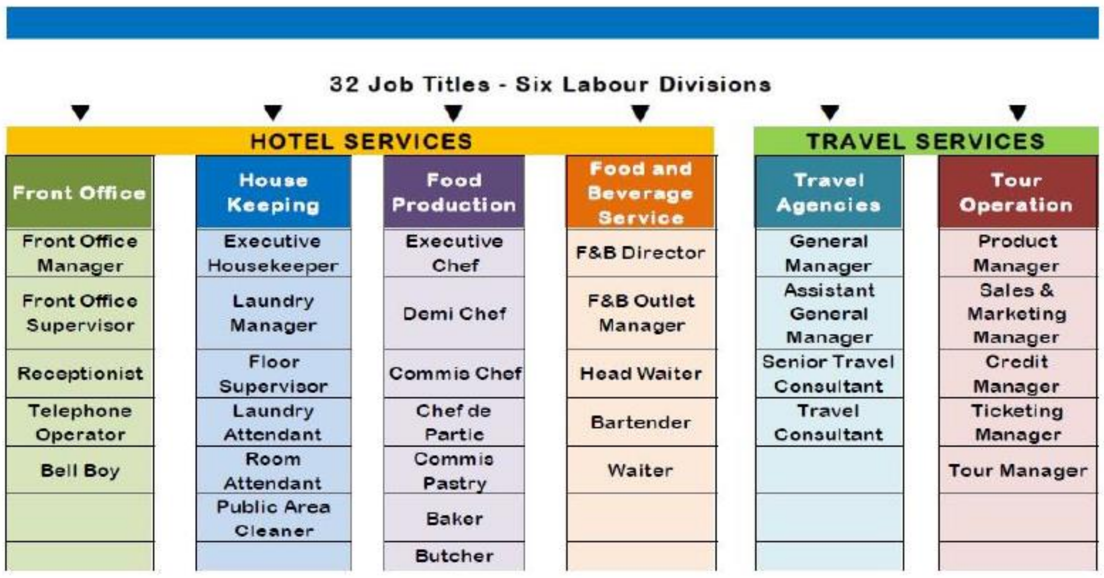
C. THE ROLE OF TESDA

Under the present structure of MRA, TESDA has the following functions: 1) assessment of qualifications and competencies against the standards enshrined in ACCSTP and 2) certification of tourism professionals. With the need to optimize the tourism industry and respond to the demands of internationalization, TESDA shall take a proactive role in developing higher levels of training to produce highly competent technical and vocational workers and professionals who can be employed domestically or in other ASEAN countries.

In 2011-2012, TESDA, together with the TIBFI and the DOT, reviewed its existing Training Regulations (TRs) and Competency-based Curriculum (CBC) against equivalent job titles under the MRA. There are thirty-two (32) job titles categorized into six (6) common labor divisions identified as illustrated in Figure 4.

Referring to Figure 4, the schematic outline of the ASEAN MRA on Tourism Professionals, a Philippine Tourism Professional Certification Board (TPCB) is needed in the facilitation of the assessment and certification of the tourism professionals. In view of TESDA being responsible in the assessment and certification of the skilled workers in the Philippines, TESDA was officially designated as the *Philippine Tourism Professional Certification Board (TPCB)* in 2013. As discussed earlier, the TPCB is responsible for the assessment and certification of Tourism Professionals in the respective ASEAN member state. To facilitate the mobility of tourism professionals in competency-based tourism qualifications within ASEAN countries, TESDA's National Certification serves as a medium for the free movement of skilled and certified tourism labor across the ASEAN region.

Figure 5. Six (6) Labor Divisions and Thirty (32) Job Titles



Source: ASEAN MRA on Tourism Professionals Handbook

VI. TVET Capacity in the Industry

TESDA's enrolled, graduated, assessed and certified individuals for the tourism sector has been increasing. From 242,679 assessed and 213,785 certified in 2011 to 335,905 assessed and 309,936 assessed in 2014 (See Table 12). As a Philippine Tourism Professional Certification Board- designate, TESDA will continuously assess and certify competent individuals complying with the ASEAN Common Competency Standards for Tourism Professionals.

Table 12. Number of Persons Assessed and Certified, 2011-2014[4]

2011			2012			2013			2014		
A	C	%	A	C	%	A	C	%	A	C	%
242,679	213,785	88.1	280,435	247,104	88.1	331,615	302,873	91	335,905	309,937	92

As of March 2016, there is a total of 5,093 registered programs in TESDA under the Tourism (Hotel and Restaurant) and 1,668 TVET providers across the Philippine archipelago.

Table 13. Number of TVET Providers and Registered Programs by Region
(As of March 31, 2016)

Regions	Number of TVET Providers	Number of Registered Programs
NCR	309	1021
CAR	34	104
I	117	431
II	32	76
III	261	862
IV-A	157	365
IV-B	53	122
V	106	305
VI	63	174
VII	100	332
VIII	63	177
IX	75	275
X	82	219
XI	84	269
XII	72	205
CARAGA	37	94
ARMM	23	62
Total	1,668	5,093

[4] See Annex 1 for number of persons assessed and certified 2011-2014

With regard specific training regulations, below are TESDA's corresponding programs to some of the jobs identified in Figure 5:

- Front Office Services NC II
- Housekeeping NC II, III and IV
- Commercial Cooking NC III and IV
- Cookery NC II
- Bread and Pastry Production NC II
- Food and Beverage Services NC II, III and IV
- Bartending NC II
- Travel Services NC II
- Tourism Promotion Services NC II

Identification of these TVET qualifications will facilitate the mobility of workers in the country. Furthermore, this will ensure that workers will enjoy similar benefits and treatment from other workers from other country.

D. Way Forward

The above discussion calls for further development of trainings and certifications that correspond to the identified potential areas for employment under the increased internationalization of labor. Most of these areas can be of high compensation and social esteem, which could well encourage workers to stay in the industry, given the foreign demand. Training regulations (TRs) have to be continuously reviewed to align with the international requirements of the tourism sector and keep up with the demands of the industry to decrease job-skill mismatch. This way, graduates shall have the level of skills and knowledge commensurate to the demands of the industry.

In line with this, TESDA must continuously hold its industry consultations including other stakeholders like schools and training institutions. This way, not only the training regulations are reviewed, but other relevant concerns of the industry are given an avenue for discussion.

It is also imperative to consistently improve the quality of information and career guidance to students on their career choices and employment opportunities in the industry.

Moreover, further research under the area of the tourism sector is recommended to develop more grounded training initiatives and provision for the sector. Possible research collaboration with the World Travel & Tourism Council could be looked into especially under the areas of economic research and policy research.

With these efforts, TESDA can provide a more substantial and up-to-date education to its trainees thereby producing more qualified and competitive workers ready to take the demands of the sector, both national and international.

ANNEX

NUMBER OF PERSONS ASSESSED AND CERTIFIED UNDER THE TOURISM SECTOR, 2011-2014

A. Number of Persons Assessed and Certified by Sex and Qualification, 2011 Tourism (Hotel and Restaurant)						
Qualifications	Assessed		Certified		Total	
	Male	Female	Male	Female	Assessed	Certified
Baking/Pastry Production NC II	1,314	3,060	1,154	2,765	4,374	3,919
Prepare Bakery Products For Patissiers	583	1,095	568	1,049	1,678	1,617
Prepare And Present Gateaux, Tortes and Cakes	374	704	336	644	1,078	980
Prepare And Display Petits Fours	335	534	290	477	869	767
Bartending NC II	6,415	8,487	5,278	6,189	14,902	11,467
Clean Bar Areas	1,254	1,456	1,185	1,340	2,710	2,525
Operate Bar	941	1,094	852	1,003	2,035	1,855
Prepare And Mix Cocktails And Non-Alcoholic Drinks	960	1,153	796	929	2,113	1,725
Provide Wine Service	797	1,005	622	742	1,802	1,364
Bread and Pastry Production NC II	2,648	6,031	2,333	5,316	8,679	7,649
Bread Making	252	438	212	371	690	583
Pastry Making	399	704	367	673	1,103	1,040
Cake Making	403	733	352	659	1,136	1,011
Petits fours Making	191	363	161	338	554	499
Commercial Cooking NC II	11,039	16,295	9,993	14,807	27,334	24,800
Prepare And Bake Pastry Products	2,204	3,522	2,015	3,226	5,726	5,241
Prepare And Cook Hot Meals	1,880	3,175	1,742	2,941	5,055	4,683
Perform Pantry/Cold Kitchen Operations	1,491	2,369	1,278	2,061	3,860	3,339
Commercial Cooking NC III	65	183	58	159	248	217
Plan And Prepare Foods	7	9	2	8	16	10
Plan And Prepare Quantity Of Foods	2	3	1	1	5	2
Plan And Cost Catering Services	3	3	1	-	6	1
Commercial Cooking NC IV	5	1	1	1	6	2
Events Management Services NC III	146	229	99	145	375	244
Event Planning Services	8	9	7	6	17	13
On-Site Event Management Services	5	12	5	12	17	17
Food and Beverage Services NC II	14,932	22,806	12,981	19,860	37,738	32,841
Provide Link Between Kitchen And Service Areas	3,345	5,306	3,037	4,795	8,651	7,832
Provide Food And Beverage Service	2,159	3,677	1,830	3,001	5,836	4,831
Provide Room Service	1,871	3,218	1,536	2,624	5,089	4,160

Continuation of the ***Number of Persons Assessed and Certified by Sex and Qualification, 2011 Tourism (Hotel and Restaurant)***						
Develop And Update Food And Beverage Knowledge	1,711	2,951	1,466	2,476	4,662	3,942
Food and Beverage Services NC III	727	726	640	624	1,453	1,264
Food and Beverage Services NC III (Restaurant and Fine Dining)	31	26	30	24	57	54
Food and Beverage Services NC III (Restaurant and Coffee Shop)	642	451	527	387	1,093	914
Food and Beverage Services NC III (Restaurant, Fine Dining and Coffee Shop)	85	43	74	40	128	114
Food and Beverage Services NC IV (Restaurant)	1	5	1	5	6	6
Food and Beverage Services NC IV (Restaurant and Coffee Shop)	1	7	-	5	8	5
Front Office Services NC II	1,918	4,189	1,602	3,572	6,107	5,174
Receive And Process Reservations	753	1,652	599	1,311	2,405	1,910
Operate Computerized Reservations System	207	644	180	562	851	742
Provide Accommodation Reception Services	209	683	138	513	892	651
Conduct Night Audit	304	911	217	691	1,215	908
Provide Club Reception Services	305	909	236	753	1,214	989
Provide Porter Services	352	977	319	893	1,329	1,212
Housekeeping NC II	15,135	25,202	13,623	23,417	40,337	37,040
Perform Housekeeping	3,444	4,989	2,964	4,334	8,433	7,298
Provide Valet Service	1,814	2,880	1,671	2,716	4,694	4,387
Laundry Linen and Guest Clothes	2,073	3,307	1,998	3,186	5,380	5,184
Housekeeping NC III	153	298	129	242	451	371
Tour Guiding Services NC II	483	1,033	314	730	1,516	1,044
Research Information Relevant To Tour Itinerary	219	453	162	344	672	506
Manage Arrangements For Visitors	117	246	79	179	363	258
Accompany And Guide Visitors In Accordance With The Tour Itinerary	99	202	37	91	301	128
Tourism Promotion Services NC II	30	82	16	57	112	73
Travel Services NC II	32	70	8	32	102	40
Book Travel -Related Reservation	38	101	28	70	139	98
Issue Tickets And Multi-Purpose Documents	19	59	5	11	78	16
Administer Billing And Settlement Plan	17	55	7	14	72	21
Messman, Cook	14,114	793	13,501	701	14,907	14,202
Total	101,061	141,618	89,663	124,122	242,679	213,785

B. Number of Persons Assessed and Certified by Sex and Qualification, 2012 Tourism (Hotel and Restaurant)						
Qualifications	Assessed		Certified		Total	
	Male	Female	Male	Female	Assessed	Certified
Baking/Pastry Production NC II	376	825	226	579	1,201	805
Prepare Bakery Products For Patissiers	174	318	66	195	492	261
Prepare And Present Gateaux, Tortes and Cakes	196	326	75	199	522	274
Prepare And Display Petits Fours	174	236	65	112	410	177
Bartending NC II	8,521	9,329	7,247	8,128	17,850	15,375
Clean Bar Areas	757	809	697	772	1,566	1,469
Operate Bar	736	808	644	727	1,544	1,371
Prepare And Mix Cocktails And Non-Alcoholic Drinks	678	840	508	610	1,518	1,118
Provide Wine Service	554	636	367	444	1,190	811
Bread and Pastry Production NC II	4,861	10,987	4,453	9,987	15,848	14,440
Bread Making	261	694	206	568	955	774
Pastry Making	363	1,084	286	889	1,447	1,175
Cake Making	242	711	177	593	953	770
Petits fours Making	297	920	239	759	1,217	998
Commercial Cooking NC II	16,106	26,355	14,873	24,385	42,461	39,258
Prepare And Bake Pastry Products	1,355	3,098	1,195	2,767	4,453	3,962
Prepare And Cook Hot Meals	1,066	2,480	975	2,250	3,546	3,225
Perform Pantry/Cold Kitchen Operations	669	1,496	520	1,194	2,165	1,714
Commercial Cooking NC III	94	170	67	133	264	200
Plan And Prepare Foods	-	1	-	1	1	1
Plan And Prepare Quantity Of Foods	-	1	-	1	1	1
Commercial Cooking NC IV	2	4	2	4	6	6
Plan And Prepare Specialty Foods	60	57	-	-	117	-
Plan And Implement A Food Safety Program	60	57	-	-	117	-
Plan And Implement A Catering Event	60	57	-	-	117	-
Events Management Services NC III	282	633	204	426	915	630
Event Planning Services	1	6	-	1	7	1
On-Site Event Management Services	3	7	3	6	10	9
Food and Beverage Services NC II	22,769	33,935	20,065	30,451	56,704	50,516
Provide Link Between Kitchen And Service Areas	1,964	2,963	1,675	2,670	4,927	4,345
Provide Food And Beverage Service	1,683	2,739	1,179	2,041	4,422	3,220
Provide Room Service	1,610	2,409	1,235	1,950	4,019	3,185

Continuation of the Number of Persons Assessed and Certified by Sex and Qualification, 2012 *Tourism (Hotel and Restaurant)*						
Develop And Update Food And Beverage Knowledge	1,661	2,512	1,330	2,088	4,173	3,418
Food and Beverage Services NC III	1,434	1,490	1,224	1,313	2,924	2,537
Food and Beverage Services NC III (Restaurant and Fine Dining)	1	3	-	3	4	3
Food and Beverage Services NC III (Restaurant and Coffee Shop)	918	795	847	740	1,713	1,587
Food and Beverage Services NC III (Restaurant, Fine Dining and Coffee Shop)	132	117	125	109	249	234
Food and Beverage Services NC IV	16	23	16	23	39	39
Front Office Services NC II	3,122	6,084	2,479	5,281	9,206	7,760
Receive And Process Reservations	337	669	192	417	1,006	609
Operate Computerized Reservations System	197	399	107	263	596	370
Provide Accommodation Reception Services	203	407	85	198	610	283
Conduct Night Audit	359	672	194	415	1,031	609
Provide Club Reception Services	341	638	193	415	979	608
Provide Porter Services	350	665	245	523	1,015	768
Housekeeping NC II	20,045	34,176	18,220	31,844	54,221	50,064
Perform Housekeeping	1,025	1,665	785	1,343	2,690	2,128
Provide Valet Service	1,236	2,240	1,062	2,043	3,476	3,105
Laundry Linen and Guest Clothes	1,114	1,940	960	1,704	3,054	2,664
Housekeeping NC III	185	348	164	277	533	441
Tour Guiding Services NC II	742	1,533	582	1,207	2,275	1,789
Research Information Relevant To Tour Itinerary	104	216	103	207	320	310
Manage Arrangements For Visitors	112	214	111	217	326	328
Accompany And Guide Visitors In Accordance With The Tour Itinerary	77	156	58	124	233	182
Tourism Promotion Services NC II	31	52	29	52	83	81
Travel Services NC II	132	286	80	174	418	254
Book Travel-Related Reservation	31	82	28	63	113	91
Issue Tickets And Multi-Purpose Documents	27	55	9	11	82	20
Administer Billing And Settlement Plan	23	63	6	13	86	19
Messman, Cook	17,021	994	15,859	853	18,015	16,712
Total	116,950	163,485	102,342	144,762	280,435	247,104

C. Number of Persons Assessed and Certified by Qualification, 2013 Tourism (Hotel and Restaurant)		
Qualification	Assessed	Certified
Attraction & Theme Parks Operation NC II	0	0
Bartending NC II	31,944	27,953
Bread and Pastry Production NC II	25,761	23,719
Baking and Pastry Production NC II	767	653
Cookery NC II	0	0
Commercial Cooking NC II	62,937	58,079
Commercial Cooking NC III	167	130
Commercial Cooking NC IV	25	25
Events Management Services NC III	1,929	1,475
Food and Beverage Service NC II	86,987	78,764
Food and Beverage Service NC III	3,244	3,043
Food and Beverage Service NC III (Restaurant and Fine Dinning)	0	0
Food and Beverage Service NC III (Restaurant and Coffee Sop)	2,118	1,958
Food and Beverage Service NC III (Restaurant, Fine Dining and Coffee Sop)	465	424
Food and Beverage Services NC IV	0	0
Food and Beverage Services NC IV (Restaurant)	0	0
Food and Beverage Services NC IV (Restaurant and Coffee Shop)	0	0
Front Office Services NC II	17,054	14,736
Housekeeping NC II	80,431	75,375
Housekeeping NC III	277	225
Housekeeping NC IV	0	0
Tour Guiding Services NC II	4,087	3,484
Tourism Promotion Services NC II	438	407
Travel Services NC II	606	581
Subtotal	**319,237**	**291,031**

D. Number of Persons Assessed and Certified by Sex and Qualification, 2014 Tourism (Hotel and Restaurant)						
Qualifications	Assessed		Certified		Total	
	Male	Female	Male	Female	Assessed	Certified
Attraction & Theme Parks Operation NC II	-	-	-	-	-	-
Promoting Attractions and Theme Parks	-	-	-	-	-	-
Operating Rides	-	-	-	-	-	-
Operating Water - Based Rides	-	-	-	-	-	-
Operating Games	-	-	-	-	-	-
Operating Animal Exhibits	-	-	-	-	-	-
Baking/Pastry Production NC II	169	563	148	473	732	621
Prepare Bakery Products For Patissiers	9	100	9	84	109	93
Prepare And Present Gateaux, Tortes And Cakes	40	171	40	171	211	211
Prepare And Display Petits Fours	11	88	11	88	99	99
Bartending NC II	11,814	14,278	10,476	12,822	26,092	23,298
Clean Bar Areas	645	807	609	775	1,452	1,384
Operate Bar	610	717	559	682	1,327	1,241
Prepare And Mix Cocktails And Non-Alcoholic Drinks	506	555	420	500	1,061	920
Provide Wine Service	283	334	231	279	617	510
Barista NC II	11	5	5	3	16	8
Bread and Pastry Production NC II	8,852	26,622	8,066	24,286	35,474	32,352
Bread Making	562	1,731	558	1,712	2,293	2,270
Pastry Making	559	2,011	549	1,986	2,570	2,535
Cake Making	404	1,662	402	1,644	2,066	2,046
Petits fours Making	207	547	204	539	754	743
Commercial Cooking NC II	6,682	13,331	6,224	12,379	20,013	18,603
Prepare And Bake Pastry Products	157	443	152	438	600	590
Prepare And Cook Hot Meals	162	459	159	456	621	615
Perform Pantry/Cold Kitchen Operations	113	339	110	335	452	445
Cookery NC II	5,920	9,673	5,358	8,273	15,593	13,631
Prepare And Cook Hot Meals	662	1,313	642	1,268	1,975	1,910
Prepare Cold Meals	356	782	320	721	1,138	1,041
Prepare Sweets	314	571	271	503	885	774

Continuation of the Number of Persons Assessed and Certified by Sex and Qualification, 2014, Tourism (Hotel and Restaurant)						
Commercial Cooking NC III	36	62	32	57	98	89
Plan And Prepare Foods	5	-	4	-	5	4
Plan And Prepare Quantity Of Foods	4	-	4	-	4	4
Plan And Cost Catering Services	5	-	-	-	5	-
Commercial Cooking NC IV	-	-	-	-	-	-
Plan And Prepare Specialty Foods	-	-	-	-	-	-
Plan And Implement A Food Safety Program	-	-	-	-	-	-
Plan And Implement A Catering Event	-	-	-	-	-	-
Events Management Services NC III	820	1,894	721	1,613	2,714	2,334
Event Planning Services	4	22	4	22	26	26
On-Site Event Management Services	6	57	3	42	63	45
Food and Beverage Services NC II	30,570	50,311	27,896	46,409	80,881	74,305
Provide Link Between Kitchen And Service Areas	1,802	3,286	1,735	3,168	5,088	4,903
Provide Food And Beverage Service	1,493	2,536	1,392	2,358	4,029	3,750
Provide Room Service	1,406	2,440	1,321	2,319	3,846	3,640
Develop And Update Food And Beverage Knowledge	1,118	2,025	1,095	1,988	3,143	3,083
Food and Beverage Services NC III	2,797	3,482	2,589	3,231	6,279	5,820
Food and Beverage Services NC IV	-	-	-	-	-	-
Front Office Services NC II	5,628	12,634	4,979	11,351	18,262	16,330
Receive And Process Reservations	238	597	197	520	835	717
Operate Computerized Reservations System	65	157	62	150	222	212
Provide Accommodation Reception Services	43	103	28	93	146	121
Conduct Night Audit	195	437	157	373	632	530
Provide Club Reception Services	212	499	190	451	711	641
Provide Porter Services	189	502	178	482	691	660
Housekeeping NC II	26,363	51,409	24,913	48,658	77,772	73,571
Perform Housekeeping	860	1,836	767	1,688	2,696	2,455
Provide Valet Service	912	1,854	871	1,772	2,766	2,643
Laundry Linen and Guest Clothes	698	1,424	674	1,386	2,122	2,060
Housekeeping NC III	128	368	118	341	496	459
Housekeeping NC IV	-	-	-	-	-	-

Continuation of the Number of Persons Assessed and Certified by Sex and Qualification, 2014, Tourism (Hotel and Restaurant)						
Local Guiding Services NC II	5	9	5	9	14	14
Tour Guiding Services NC II	1,096	2,871	978	2,579	3,967	3,557
Research Information Relevant To Tour Itinerary	64	226	62	214	290	276
Manage Arrangements For Visitors	57	202	57	198	259	255
Accompany And Guide Visitors In Accordance With The Tour Itinerary	7	37	3	21	44	24
Tourism Promotion Services NC II	272	398	251	384	670	635
Travel Services NC II	195	665	152	567	860	719
Book Travel -Related Reservation	21	42	21	40	63	61
Issue Tickets And Multi-Purpose Documents	11	27	10	27	38	37
Administer Billing And Settlement Plan	7	11	6	11	18	17
Total	116380	219525	106998	202939	335905	309937

References

Department of Tourism (2011). National Tourism Development Plan.

Federation of Filipino Chinese Chambers of Commerce and Industry (n.d.) Philippine tourist arrivals reach a record 5.4M in 2015. Retrieved from http://www.ffcccii.org/philippine-tourist-arrivals-reach-a-record-5-4m-in-2015/

TESDA (2015). Number of Persons Assessed and Certified by Sex, Qualification, and Sector: 2011-2014.

TESDA (2014). LMIR: Skills Demand and Supply Mapping.

The Philippine Star (2016). Mismatch hounds labor market – DOLE. Retrieved from http://www.philstar.com/business/2016/03/11/1561618/mismatch-hounds-labor-market-dole

Travel & Tourism: Economic Impact (World) (2015). World Travel and Tourism Council. Retrieved at http://www.wttc.org/-/media/files/reports/economic%20impact%20research/regional%202015/world2015.pdf

Travel & Tourism: Economic Impact (Philippines) (2015). Retrieved at http://www.wttc.org/-/media/files/reports/economic%20impact%20research/regional%202015/southeastasia2015.pdf

United Nations World Trade Organization (2015) UNWTO Tourism Highlights 2015 Edition. Retrieved at http://www.e-unwto.org/doi/book/10.18111/9789284416899.

Planning Office
Office of the Deputy Director General for Policies and Planning
Technical Education and Skills Development Authority
TESDA Complex, East Service Road, South Superhighway,
Taguig City, Metro Manila
Tel. No. (+632) 888 5652 / 817 2675 / 893 1966
www.tesda.gov.ph