Situtation Analysis

Hospitality
Industry

Table of Contents

Acronyms

AJK	Azad Jammu Kashmir
B-Tech	Bachelors of Technology
CPEC	China Pakistan Economic Corridor
DTE	Directorates of Technical Education
GIZ	Gesellschaft für Internationale Zusammenarbeit
GB	Gilgit Baltistan
KP	Khyber Pakhtunkhwa
KII	Key Information Interviews
NAVTTC	National Vocational and Technical Training Commission
NSIS	National Skills Information System
PVTC	Punjab Vocational Training Council
SPSS	Statistical Package for Social Science
SDC	Skill Development Councils
SSC	Sector Skills Council
SSP	Sector Support Programme
TEVTAs	Technical and Vocational Training Authorities
TRSP	TVET Reform Support Programme
TVET	Technical and Vocaitonal Education and Training

Foreword

Considering the national and international economic forecasts, Pakistan is expecting a bright future with sustained growth and an alluring avenue for foreign investment. This optimism is based on Pakistan's geographical position, close to some of the world's largest markets; its largely untapped mineral resources; its strengthening infrastructure and young population. This potential is unlikely to be materialized without more educated and skilled workforce. Creation of skilled workforce and linking it up with the employers – the market, is a huge challenge to the government of Pakistan. The government can't respond to this situation all alone because of lacking institutional capacity. Some of the provinces in Pakistan are going through a structural change and creating a youth bulge which can eventually yield demographic dividend. In order to respond to such situations, the social scientists have come up with the concept of the Skills Council to support the governments. Normally Sector Skills Organizations exist in many different countries with different names with a legal framework.

In Pakistan the concept is landed as "Skills Council". The Skills Council aims for improving the standard of the workforce and its acceptability in construction and hospitality sectors in Pakistan. The Council will play the role of an advisor to the Construction Sector both for Technical Training Providers and Industry/End User/Employers. Skills Council in Construction and Hospitality Sector of Pakistan has emerged as the representative voice for issues in technical education and vocational education. It is recognized by the Government of Pakistan through NAVTTC and endorsed by the Pakistan Hotels Association, the Pakistan Food Association and leading private sector employers in the sectors of hospitality and tourism. The Council aims to support in setting of standards and how training is delivered in the sector across Pakistan. In order to achieve the above goals, the SSCH works with employers in the sector, and other stakeholders in designing and implementing training and certification that meets the demand led national standards. The SSCH, therefore, plans to carry out a review of the skills needs and trends in the hospitality and tourism sector, and help develop strategies to meet those skills needs.

The impact of SSCH is measured in terms of the increased in quantum of investment allocated by employers towards training, and how much the performance of the employees in the sector has improved with the introduction of SSHC approved standardized training courses. Thus SSCH has developed a Business Strategy for next three years, i.e. 2018 to 2021. According to the studies, unemployment amongst 15-24 year olds are expected to reach 8.6 million, by 2020. Put another way, we need to create 1.5 million jobs each year to provide opportunities for our young people. If we do this, the benefits – in terms of wealth creation and social cohesion – are immense. If we fail, there will be negative consequences. One of the objectives of Skills Council is to give greater economic empowerment to the people.

The Council is obliged for the time, the feedback and the resources shared by TVET SSP, NSIS and NAVTTC. It honors the reforming efforts of the TVET sector support programme. It acknowledges the initiatives such as the development of national qualifications system for teachers, code of conduct, accreditation system, skill standards and curriculum in priority areas and thereby establishing the National Skills Information System (NSIS) and counts it as a real contribution to the sector.

The Council expresses immense gratification to TVET SSP, GIZ for technically facilitating and supporting the situational analysis study. It could never have been possible without their generous support. The Council highly appreciates TVET SSP, GIZ concern and contribution towards seeding economic development in Pakistan. The continuation of these collaborative efforts can no doubt make a significant impact at the grass root level.

Executive Summary

The intent of the study was to carry out demand and supply analysis of the skilled labor pool in Pakistan. The demand side was governed by the employers and the supply was dealt with the data of TVET institutes. The study was headed around the indicators of 1. An existing skilled workforce with employers 2. Current skilled workforce deficiencies, 3. Future skilled workforce demands. The study has regressed the availability of a skilled workforce with the demand to determine the employment potential and skills acquisition efficacy. The objective of the study also includes strands of employers' preferences, the dynamics of the labor market, skills requirements, training delivery and curriculum alignment with market demands.

The hospitality industry is a subcategory of the services industry. It has four segments 1) Food and Beverages, 2) Travel and Tourism, 3) Lodging, 4) Recreation. Basically, it captures everything that deals with leisure activities. The global hospitality sector has tremendous statistics and its direct contribution is about USD 2.3 trillion, which is about 3.1% of the global GDP in 2016. However, the overall contribution (direct, indirect and induced) of the hospitality industry remains USD 7.6 trillion (10.2% of GDP). By 2027, the global economic impact is forecasted to rise to 11.4% of GDP i.e. USD 11.5 trillion. The hospitality sector provided 3.6 % of direct employment of the total employment and it stands at 108 million. An estimated figure of 2027 is tolled for 138 million direct jobs. The indirect job market induced by the hospitality industry is considerably higher and it recorded 292 million jobs in 2016 i.e. 9.6% of the total employment. The year 2027 forecast is 381 million jobs and it is 11.1% of the total employment with annual growth of 2.5%.

The survey has provided important information regarding the skilled workforce in various provinces and regions. The distribution is divided among TVET, work-based learning, informal sector workers, and skilled workers. Different provinces have different types of workers' combination (figure no 3). The feminine partaking in the skilled workforce is derisory and at most 16% female workers are reported for Sindh, followed by AJK with 7% and Panjab with 6% while KP has just 0.1% of the female workforce (fig. No 4). The didactic job market requirements are heralded by certificates and short courses with a description of 43% and 37.3%, respectively, while diploma gained 20% jobs and DAE and B-Tech received no demand in the market (fig. No 5). The survey has also classified provincial distribution of job market at different educational levels. The AJK, Baluchistan, KP and Punjab labor markets showed a higher demand for certificate courses while GB and Sindh have a higher demand for short courses (Fig. No. 6).

Educational wise, gender share of the workforce across various provinces is greatly slanted and in support of the male labor force. The percentage wise share of skilled workers in the provinces is showing greater female distributions for GB, Sindh, and Baluchistan. While, KP was, at lowest, followed by Punjab and AJK. However, the skewed share can be scaled down through an increase in short and certificate courses (Fig. No. 7 & 8). The absence of relevant jobs for females, lack of quality training at short courses and certificate levels, cultural and behavioral restraints, and adverse working conditions are the primary reasons of a lower percentage of female workers in the labor force at national and provincial levels.

The hospitality industry job profile is remarkably vivid and carries vast potential. The Pakistani job market is influenced by jobs of waiters and Chefs, followed by restaurant managers, housekeeping and receptionist. These counted for approximately 200,000 jobs, which can be bred if the figures for traveling & tourism, café & clubs, and suppliers are included (Figure no 9). Skilled workers deficiency in the leading tourist destinations is evident and northern area demanded skilled workers are 94% larger than the supplied Labors (figure no 10). Indeed, it's a fact that every province receives affluence of local skilled workers. But how to put them in the vacant slot according to the satisfaction of employers is a strategic challenge (figure no 11). The bigger predicament is the workforce transition from the available resource pool to the market. Although mostly the local laborer is available, the satisfaction level of the employer varies from region to region. From figures no 10, 11 & 12, it is established, that all regions have somehow demand for skilled workers, they are available, but the shift to the local market is an issue, while in KP the employer is dissatisfied with available skilled workers and quality become an issue in their case. Figures no 13-to-19 have provided region-wise potential created by the demand and supply variations. It's worth noting that northern areas, AJK and KP exhibited tremendous employment potential if tended properly.

Introduction

Background and Rationale

Recognizing the critical role of skills development in achieving sustained economic and social development, maintaining global competitiveness and responding timely to changes in technology and work patterns, the Government of Pakistan has committed to a major reform of its system of technical, vocational education and training (TVET). Since April 2011, the TVET Reform Support Programmes (TRSP) has assisted the Government of Pakistan in the implementation of its ambitious TVET sector reform. The programme is co-funded by the European Union and the Federal Republic of Germany, The Royal Embassy of Norway and implemented by the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH. Programme partners include the National Vocational and Technical Training Commission (NAVTTC), the Technical and Vocational Training Authorities (TEVTAs) in provinces and regions, and many other stakeholders.

During the first phase, TRSP supported NAVTTC in the establishment of the National Skills Information System (NSIS). NSIS supports decision makers and TVET planners in policy formulation and execution by providing research-based labor market data. It also facilitates career guidance and placement services for TVET graduates and employers. Following is the main purpose of NSIS Cell.

- To develop/provide a reliable National Skills Information System for workforce development in employable skills
- To provide timely and accurate information on demand and supply analysis, to TVET planners, training institutions, industry, academia, students and public in general;
- To establish and facilitate career / vocational guidance and placement services for TVET graduates and potential employers;

Skill Councile in Hospitaltiy Sector (SSHC)

During 2017, the National Vocational and Technical Training Commission (NAVTTC), the apex body for TVET in Pakistan, invited representatives from key economic sectors to discuss how employers could be more closely engaged in skills development – in both policy determination and implementation. As a result of these discussions, a coalition of employers and training providers in the hospitality sector agreed to work together to establish a Sector Skills Council for the sector. On 5 December 2017, a Memorandum of Understanding was agreed between NAVTTC and the Pakistan Hotel Association and the Pakistan Food Association to confirm the mutual commitment to create a Sector Skills Council. On 22 December 2017 NAVTTC formally notified the establishment of an interim Council.

Skills Council in Hospitality Sector (SSCH) has been set up as a national organization in order to ensure that an active role of the private sector is played in planning, designing and delivery of technical

and vocational education and training. The organization has been recognized by the Government of Pakistan through NAVTTC as the representative voice for the sector in technical education and vocational education issues. It has also been endorsed by the Pakistan Hotels Association, the Pakistan Food Association and leading private sector employers in the sectors of hospitality and tourism.

The Sector Skills Council aims to support in setting of standards and how training is delivered in the sector across Pakistan. By doing so, the council envisage to assist in filling in skills gaps and shortages, improve quality and productivity of the workforce, increase opportunities for all individuals in the workforce and improve training service supply. In order to achieve the above goals, the SSCH works with employers in the sector, and other stakeholders in designing and implementing training and certification that meets the national standards. It also endeavors to ensure that the training and certification requirements are 'demand-led', that is, focused on those skills that are required by the employers.

The SSCH, therefore, plans to carry out a review of the skills needs and trends in the hospitality and tourism sector, and help develop strategies to meet those skills needs. This process will be carried out with the active partnership of employers in the sector. The SSCH will profile the sector trades/occupations and their inter-linkages and thereby have in place a fact-based skills gap/needs analysis for the sector. The SSCH will also actively assist in the development of competency-based training and assessment programmes. The SSHC aims to work with training service providers to ensure that they provide programmes that develop the skills required employers.

Objectve of Survey

The objective of the survey is to enhance knowledge of labor market trends, skill profiles, identify skill shortages, skill training needs, skills exceeding demand, and preference/capacities of the employers. It would help to assess the needs of the local market for demanding skills and help in selecting and designing skill specific curricula. The objective of the survey can be summarized as follows.

- Collection of data to determine the gap between demand and supply of skilled workforce in the Hospitality sector.
- Assessment of quality skills in the labor market.
- Design market-based training needs of the Hospitality sector
- Recruitment preference and process in Hospitality industries

Beneficiaries of Survey

Private Sector

The businesses, industries in the private sector and training providers are the major employers of the TVET graduate. It spends huge finance and time to attract and maintain skilled labor. It will enjoy the ease recruitment of the best demand-driven, skilled worker from the labor market. At the same time, the private sector training provider will be benefited from the regulated sector that will sound computation among the rival training institution.

Public Sector

NAVTTC, TEVTAs, and PVTC need reliable data on the demand side and supply and demand gaps in the labor market to prepare a need-based skilled workforce and to formulate effective policies and outcome of NSS. Based on the current market demands and need, the development and introduction of new trades will immensely contribute to the employment of the TVET graduates.

Target Population

The registered units (having at least 5 permanent skilled workers) of the Hospitality sector are part of the target population of the survey.

Sampling Frame

The list of Hospitality industries aren't existing with the newly established sector, therefore, the second option to use the available sampling frame of NSIS cells in each province. The list of hotels & restaurants and tour operator working in tourist spots have been also included in the sampling frame.

Methodology

It is known fact the sample can't represent the character of a population, but suitable stratification and sampling technique can approve the representativeness of population characteristics.

Now the Hospitality sector doesn't have technical expertise in the field of data collection and research, therefore, it is suggested to support the sector to engage field expert (Data collection & data management) with them. The NSIS has been hired local field staff based on workload in each provincial unit. The available time is also very short; therefore, the individual consultant option can complete the data collection exercise in a speedy way, but the NSIS cell can directly control data quality and to build the capacity of sector skills council. A survey has been conducted simultaneously in all provinces unit. Maximum hospitality companies located in the urban area and random sample have been being selected from an urban area in each province.

Field Team

For the hospitality sector, the team of the local individual was selected based on GIZ criteria and following team distribution for each province.

S. No.	Province	Enumerator
1	Punjab	6
2	Sindh	5
3	KPK	4
4	Baluchistan	3
5	AJK	2
G. Total		20

Sampling Technique

When sub-population vary considerably, it is advantageous to sample each subpopulation (stratum) independently. Stratification is the process of grouping members of the population in relatively homogenous subgroups before sampling. Based on the above discussion, it is suggested to use stratified random sampling for each sector.

Sample Size and its allocation

It is presumed that any sample cannot represent population perfectly. Although such "Sampling error" cannot be avoided, it can be reduced by obtaining a sample of sufficiently large size and by using "appropriate sampling technique". Sample sizes depend on the following factors.

- Level of Significance (Which is 95% for this study).
- Variation in target population (Secondary data).
- Available resources for this study (Calculated in a budget portion which already submitted).
- Timeframe.

For a study design based on a simple random sample, the sample size required can be calculated using the following standard formula.

$$n = \frac{t^2 \times p(1-p)}{d^2}$$

Where n = required sample size

t = value for selected alpha level of 0.025 in each tail = 1.96

p = proportion;

d = acceptable margin of error for proportion (0.05 standard practice)

Every provincial unit will be addressed, but the definition of the unit must be followed, based on above, the following unit will be randomly selected from the available list of hospitality sector industries.

S. N	Province	Sample
1	Punjab	1037
2	Sindh	730
3	Khyber Pakhtunkhwa	460
4	Baluchistan	297
5	AJK	290
6	GB	235
7	Islamabad	67
Grand Total		**3116**

Questionnaire Development

At the start, the draft version questionnaire shared with sector skills council for modification based on their requirements and revised based on feedback and need of information under said survey. The questionnaire has the capability to gather the required information, which provides a base for establishing a correlation between different variables.

Field staff hiring and Training

An entire field staff has been trained in one day in Islamabad to enhance the capacity of field staff in conducting the survey, sampling technique, interviewing techniques and probing techniques. Field tests of questionnaire and enumerators have been held after training in the same place

Monitoring and data quality Assurance

The NSIS cell has been utilized its independent monitoring team in the data collection process to ensure data quality through random based spot checking and data editing of all questionnaires.

Data entry

The organization will engage a team of data entry operators with appropriate qualification and experience to feed information in SPSS. Data entry has been taken place in Islamabad to closely monitor the data entry process.

Data Analysis

The Data analyst has been conducting an analysis of the data after data cleaning. The different crosscutting relations have been drawn to achieve the objective of the study. The Data Analyst will also support the STE in reporting, writing and the draft report would be submitted to the partner organization.

Report

The first draft report would be submitted to the partner organization for the validation and comments of the report would be addressed and the final draft will be submitted as per time frame.

Literature Review

The hospitality industry is one of the components of the service industry, which whirl around customer leisure activities such as food & beverages, lodging, event planning, travelling, transportation, hoteling, and theme parks. The hospitality industry is labor intensive and can provide excellent job opportunities to the locals. Broadly, the industry consists of the businesses of; accommodation, restaurants, and travel & tourism. These are further subcategorized into; hotels, motels, inns, resorts, and serviced apartments in the accommodation sub-industry, Bars, Cafes, clubs, restaurants, drink-shops and tea shops in restaurant category and the travel & tourism is divided into travel agents, tour operators, leisure centers and casinos. The word hospitality is attributed to the industry, with the fact that all of the businesses hosted customers by providing them with amusement/refreshment services in the way or the other way. Although automation has taken many jobs rounded off, still to run the affairs smoothly, many hands are needed to run the industry[1]. The hospitality sector is a multi-billion sector with excellent job opportunities for the low and middle-income population. It's a concatenating business which involves many allied businesses (servers, housekeepers, porters, kitchen workers etc.) and jobs[2].

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[1] https://en.wikipedia.org/wiki/Hospitality_industry
[2] https://www.asumh.edu/academics/documents/What%20is%20the%20hospitality%20industry.pdf

Global Hospitality Factsheet

The hospitality sector is mainly contributed by traveling segments. Traveling contributed $1.6 trillion in 2017, making the segment one of the fastest growing sectors in the world. This phenomenal economic contribution is recorded as 10.2 percent of the Global GDP. The global travelers from emerging and developed markets with disposable income flooded to the new destinations to experience the world. The international travel departures across the globe were doubled from 600 million to 1.3 billion in the last two decades[3]. This has contributed by many countries, leaving domestic borders for the first time. These huge numbers of domestic and international travelers have injected billions in the hospitality sector.

The hospitality industry is an important economic activity in most countries. Worldwide two different methodologies are adopted to capture the economic impact of the tourism industry. The UN has adopted "Tourism Satellite Accounting Methodology" which measure only the direct contribution of travel and tourism, however, the world travel & Tourism Council (WTTC) has adopted a mechanism which captured both direct and indirect and induced impacts of the hospitality industry.

DIRECT
Travel & Tourism contribution

COMMODITIES
- Accommodation
- Transportation
- Entertainment
- Attractions

INDUSTRIES
- Accommodation services
- Food & beverage services
- Retail Trade
- Transportation services
- Cultural, sports & recreational services

SOURCES OF SPENDING
- Residents' domestic T&T spending
- Businesses' domestic travel spending
- Visitor exports
- Individual government T&T spending

INDIRECT
Travel & Tourism contribution

- T&T investment spending
- Government collective T&T spending
- Impact of purchases from suppliers

INDUCED
contribution
(spending of direct and indirect employees)

- Food and beverages
- Recreation
- Clothing
- Housing
- Household goods

TOTAL
Travel & Tourism contribution

- To GDP
- To employment

Figure no-1 WTTC Framework

Based on the WTTC methodology, the hospitality sector has directly contributed USD 2.3 trillion, which is about 3.1% of the global GDP in the year 2016. The estimated figures for the year 2017 is 3.8% i.e. 2.39 trillion USD. A growth of 4 % per annum is expected in the hospitality sector direct economic contribution and it will reach 3.1% of GDP i.e. 3.54 trillion USD by 2027. However, the total contribution (direct, indirect and induced) of the hospitality industry stands at USD 7.6 trillion (10.2%

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[3] 2018 travel and hospitality industry outlook by Deloitte

of GDP) and it was raised to 7.8 trillion in 2017. By 2027, the overall economic impact is expected to rise to 11.4% of GDP i.e. 11.5 trillion USD. (See Figure no 2)

WORLD: TOTAL CONTRIBUTION OF TRAVEL & TOURISM TO GDP
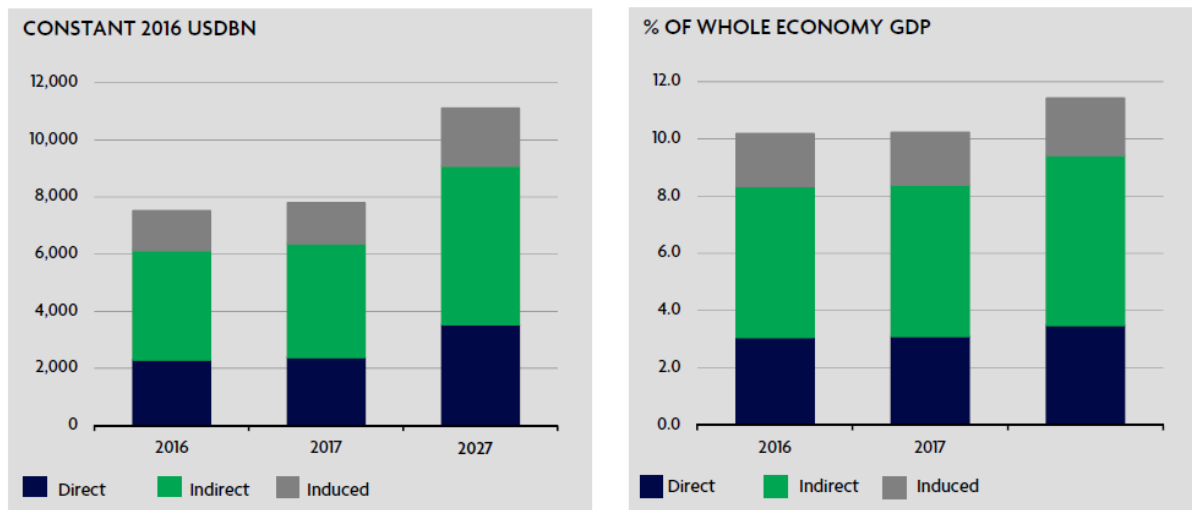
[1] All values are in constant 2016 prices & exchange rates

The hospitality sector provided 3.6 % of direct employment of the total employment and it stands at 108 million in 2016 and it is expected to grow by 2.2% annually. An estimated figure of 2027 is counted for 138 million direct jobs. The indirect job market induced by the hospitality industry is much greater and it recorded 292 million jobs in 2016 i.e. 9.6% of the total employment. The year 2027 forecast is 381 million jobs and it is 11.1% of the total employment with annual growth of 2.5%

Overview of Hospitality Industry in Pakistan

Pakistan's GDP growth for the year 2017-18 was 5.8%, which was a 13-year high.[4] The two main drivers of the growth were Agriculture and Services sector. It is the Services sector that captures the performance of the Hospitality industry. The growth in the Services sector for the previous two years was recorded at 6.43%[5]; it was one of the best performing sectors. Moreover, another highlight of the survey was Private Infrastructure Investment for which Pakistan was 1st in South Asia and the world's 5th biggest Private Participation in Infrastructure (PPI) destination.[6] It clearly shows the eagerness of the private sector to improve the business climate of Pakistan.

In the previous decades, the government has been trying hard to promote the tourism sector of Pakistan's Hospitality industry. For that very purpose, the National Tourism Policy was launched in 1990 by the Ministry of Tourism. It still governs the Tourism industry of Pakistan. According to this policy, tourism has been granted the status of an industry[7]. All tourism facilities will be treated as industrial concerns, and it has been granted "Deemed Export Status."[8] Various initiatives were

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[4] http://www.finance.gov.pk/survey/chapters_18/overview_2017-18.pdf
[5] http://www.finance.gov.pk/survey/chapters_18/overview_2017-18.pdf
[6] http://www.finance.gov.pk/survey/chapters_18/overview_2017-18.pdf
[7] http://www.tourism.gov.pk/pdf/ntp_1990.pdf
[8] http://www.tourism.gov.pk/pdf/ntp_1990.pdf

undertaken in the policy in 1990 which, among others, included concessionary loans, leasing of government land, and duty-free import of equipment[9].

Economic Impact of Tourism

According to a report published by the World Travel and Tourism Council, travel and tourism contributed 10.4% towards global GDP growth[10]. Travel and tourism account for one in every ten jobs around the planet[11]. According to its annual research, travel and tourism will contribute about $8.8 billion dollars, or 2.9%, towards Pakistan's GDP[12] In 2017 travel and tourism supported 1,493,000 jobs in Pakistan, which was 2.5% of total employment.[13] Visitor exports, a measure of contribution by a foreign tourist, contributed 3.7% of the total exports of the country and is forecasted to rise by 6.4% from 2018 up until 2028.[14] In 2017 9.1% of total investment in Pakistan were in the tourism industry.[15]

Hotels and Lodging

Pakistan's hotel industry suffered massively in the wake of the terrorist attack of 9/11. Pakistan's image around the globe has suffered ever since the Soviet invasion of Afghanistan. Pakistan's name gets thrown around the world for all the wrong reasons. Governments on all five continents issued travel advisories and warnings against traveling to Pakistan. The result was a precipitous decline in hotel occupancy rate, which nosedived to a meager 20%[16] post-2001. However, in recent years the industry has recovered somewhat. In the aftermath of Zarb-e-Azb and Raddul-Fassad, the occupancy has climbed back to 60-75%, but the foreign tourist accounts for only 6-7% of the total, which is well below the market expectation of 25%.[17] According to Pakistan Hotel Association, by the end of 2017, there were around 10,000 hotels comprising 50,000 rooms across the country. The revenue per available room in dollar terms is $150, compared to $300-$350 dollars in neighboring India. The Hotel Industry share in GDP is about 3%.[18]

Challenges Faced by Pakistan's Hospitality Industry

Pakistan suffers from a bad image problem. This problem is amplified by the lack of funds and vision to market Pakistan across the globe. Internally, lack of infrastructure and poor governance serves as the biggest hindrance to the growth of the hospitality industry. The regulatory authorities to control the quality of food are hopelessly incompetent. Even if they have improved their performance in recent years, they have yet to restore the confidence of people in their ability. A foreign tourist shuns local restaurants and café pursuant to a lack of healthy food. Then there are some unrelated factors that are draining consumers from the hospitality sector. One is the airfare; the airfare from Karachi to

[9] http://www.tourism.gov.pk/pdf/ntp_1990.pdf
[10] https://www.wttc.org/-/media/files/reports/economic-impact-research/countries-2018/pakistan2018.pdf
[11] https://www.wttc.org/-/media/files/reports/economic-impact-research/countries-2018/pakistan2018.pdf
[12] https://www.wttc.org/-/media/files/reports/economic-impact-research/countries-2018/pakistan2018.pdf
[13] https://www.wttc.org/-/media/files/reports/economic-impact-research/countries-2018/pakistan2018.pdf
[14] https://www.wttc.org/-/media/files/reports/economic-impact-research/countries-2018/pakistan2018.pdf
[15] https://www.wttc.org/-/media/files/reports/economic-impact-research/countries-2018/pakistan2018.pdf
[16] https://profit.pakistantoday.com.pk/2017/12/31/hospitality-industry-resumes-its-northward-trajectory/
[17] https://profit.pakistantoday.com.pk/2017/12/31/hospitality-industry-resumes-its-northward-trajectory/
[18] https://profit.pakistantoday.com.pk/2017/12/31/hospitality-industry-resumes-its-northward-trajectory/

Lahore is more expensive than the airfare from Karachi to Dubai.[19] Regulatory authorities are complicit in the lack of proper sanitation at most of the hospitality locations. There are also cases of gross mismanagement from government authorities. Japanese tourist visits Texla which is home to Buddhist heritage, but the government has not taken the initiative to build a three- or five-star hotel near the site. The result is that tourist has only visited it for a day and then leave.

Tourist Destinations across Pakistan

The Pakistan Tourism Development Corporation is the authority that promotes tourism in Pakistan. Currently, it is working on a new national policy for tourism, the focus of which will be infrastructure development. On its website, it lists all the tourist destinations of Pakistan. It also divides them into Adventure tourism, Ecotourism, Spiritual tourism, Heritage Tourism, and Sports Tourism.[20] Furthermore, it lists the regulatory policies concerning the foreign tourists, and the paperwork they need to carry along.

Messages Captured by Hospitality Industry

The airing of grievances by almost everyone involved in the hospitality industry is quite common. On the supply side of it, hotel and café owners complain about lack of government support. Fluctuating food prices and inflation erodes the profit, while such costs cannot be easily transferred to consumers. Government lags in providing facilities that can increase the attractiveness of a tourist destination. For example, in the valley of Naran, a tourist hotspot, hotel owners must help themselves in supplying water to their facility. There is a stream of sweet water flowing through the valley, yet the government authorities have been unable to provide water connections to hotels, albeit collecting taxes from them.

On the demand side of it, consumer, legitimately, complains about lack of food quality. It is the government's responsibility to ensure that a consumer is provided with the food that is clean, safe, and in full measure. While domestic consumers have learned to cope with it, the foreign tourist remains reluctant to give local food outlets a try.

In Western countries, there is a system of grading the quality of food at each restaurant. The grade is then posted outside for the consumers to see. A restaurant that receives an A for their food handling gets a jump in revenue by attracting new customers. Restaurants that receive a B or C are either given a warning or are closed indefinitely. Although the exact applicability of this system in Pakistan is impractical, some version of it should be tried to restore and improve consumer confidence in the hospitality industry.

According to the World Tourism Organization, the Chinese will invest $15billion in many segments of tourism in 2018. Mustansir Zakir, Chairman of Pakistan Hotels Association, commented that with improved facilities and planning about $1 billion of Chinese tourist money can be earned in Pakistan.[21]

[19] https://profit.pakistantoday.com.pk/2017/12/31/hospitality-industry-resumes-its-northward-trajectory/
[20] http://www.tourism.gov.pk/tourism_in_pakistan.html
[21] https://profit.pakistantoday.com.pk/2017/12/31/hospitality-industry-resumes-its-northward-trajectory/

Tourist Destinations in KPK

Tourism Corporation Khyber Pakhtunkhwa is the government authority responsible for promoting tourism in KPK. On its website, it lists the following places as tourist destinations: Swat, Galiyat, Kaghan, Kalash, Naran, Chitral, Dir, Peshawar, and Southern Region.[22] Within destinations, further places have been mentioned in their history. For example, if you choose Naran, it lists Shinu, Lake Saif ul Mulook, Malika Parbat, Supat Valley, Naran to Babu Sar Pas, Shogran, Paras, and Sharan as recommended destinations[23]. It also provides basic guidance to plan a trip.

Prospects and Challenges of Hospitality in KPK

Khyber Pakhtunkhwa's hospitality industry dependent upon the tourists that visit its mountain valleys towards the North. Each summer it attracts hundreds of thousand tourists because of its exquisite mountain scenery and breathtaking views. British Backpacker Society released its list of 20 adventure travel destinations for 2018, and the top of the list was Pakistan.[24] According to a study, an estimated 1.7 million foreigners visited Pakistan in 2017, and that number is expected to rise to 2018.

In the valleys of the north, the private sector has shouldered the burden of investing in resorts and hotels. Most of these hotels are non-classified. They also undertake cleaning and maintenance of the valley with their own funds. In the valleys of Kaghan and Naran hotel owners contribute money to clear the valley of snow and prepare it for the summer season.

The bane of tourism in KPK is its security perception. The hospitality industry is completely reliant upon the government security apparatus for providing security and improving its image abroad. People only spend on leisure when they feel safe. Despite the huge number of people visiting the northern areas in search of adventure tourism, there are no functioning hospitals or facilities to cope with an emergency. The whole purpose of a vacation is a relaxing experience. To fully realize the potential of tourism, and hospitality industry in general, the government needs to smoothen the travel as much as possible. That requires easing the visa process for foreigners, and facilitation along the travel route.

There also needs to be a presence of regulatory authorities that routinely check the condition of motels. KPK government needs to develop a system where complaints can be lodged against malpractice in the hospitality industry, especially in the mountain valleys. There also needs to be a check on the quality of food these non-classified hotels serve.

KPK government also needs to understand the dynamics of mountain tourism, since most of its hospitality industry is dependent upon it. According to a book published by the United Nation World Tourist Organization, mountain tourism is the only way to promote the economy of mountain valleys.[25]

[22] http://tourism.kp.gov.pk/
[23] http://tourism.kp.gov.pk/page/naran
[24] https://edition.cnn.com/travel/article/pakistan-adventure-travel/index.html
[25] https://www.e-unwto.org/doi/pdf/10.18111/9789284420261

Most people's sustenance in the mountain valley depends upon animal husbandry and agriculture. Visiting tourists are the only other opportunity that they get to improve their living standards. However, promoting mountain tourism requires a degree of carefulness. Many people that visit mountains are conservationists. The priority for them is the sustainability of the environment above everything else. The government of KPK needs to pay extra attention to activities that degrade the ecosystem. Most of the tourist destinations do not have a system of garbage collection or recycling. The waste, mostly ends up in the waterfalls and streams. This has a direct bearing on the hospitality industry. A littered place will not be visited again, and hotels will lose its customers.

Analysis and Results Interpretation

The Existing Workforce Diversity

Figures no 1 to 3, have provided skilled workforce diversity across different regions, by educational level, and by gender. Figure no 1 has presented details of skilled labor picked up for the survey and their provincial shares. The percentage share of the sample from each province was chosen by considering a 95% confidence interval with 5 percent error margin. The majority of the respondents were drawn from Punjab with 30% of the sample size, pursued by KP, Sindh, Baluchistan, AJK, GB, and federal territories. The provincial dispersal of the workforce is given in Figure no 2. The handling was conducted on the basis of types of learning of the respondents. Which is mainly divided into TVET, a work based learner, informal sector and other skilled workers? The AJK, KP, Punjab and Sindh workforce pool are dominated by learning from the informal sector. While for Baluchistan, the TVET is playing the lead role in defining their skilled worker's pool and GB has exhibited work-based learning for a skilled workforce. Figure no. 3 has brought gender wise provincial share of skilled workers. The objective of this question was to ascertain the level and concentration of female skilled workers in comparison with male workers. The results were very shocking and disappointed in terms of female job participation. Sindh is dominating with 16% female works, followed by AJK and Punjab with 7% and 6% respectively. For KP the figure is highly shocking, only 0.1 percent of the entire labor pool is females.

Figure no. 1 (Bar Graph of Provincial wise survey respondents)
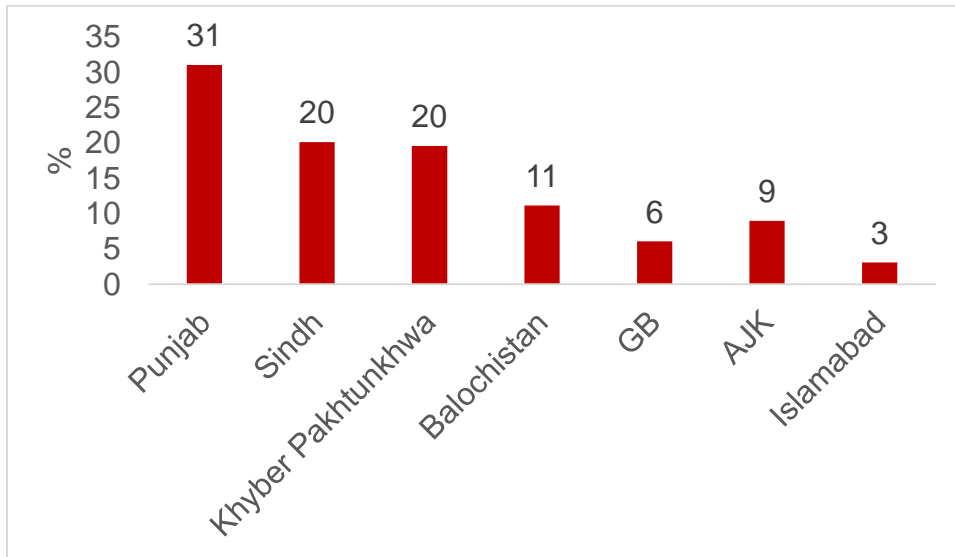
Figure 1: Provincial Coverage (%)

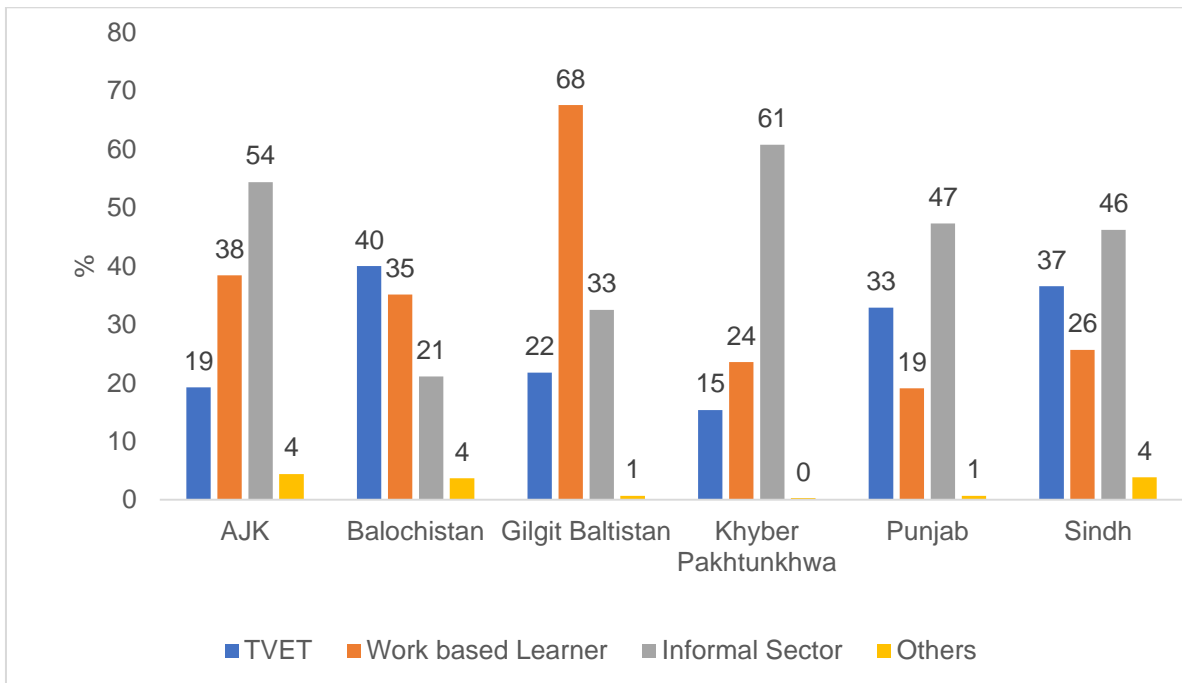**Figure 2: Source of Existing Skilled Workforce**

Figure 3: Gender wise existing skilled workforce
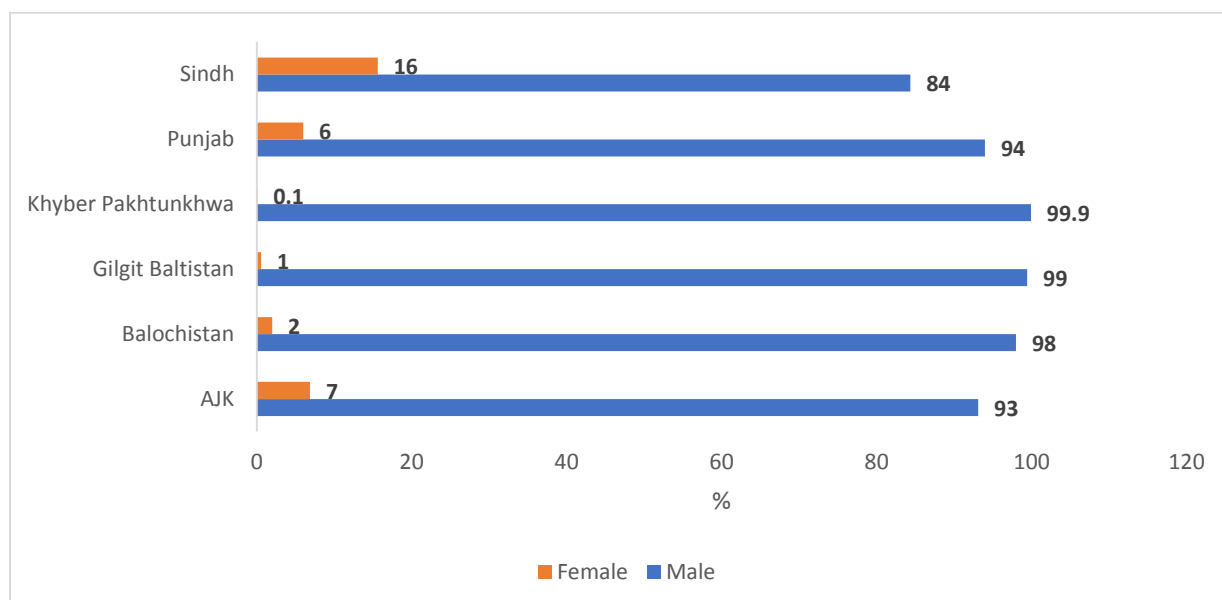
Demand & Supply of skilled workforce (Level, Provincial & Gender Distribution)

Figures no 4-7 have shown the demand and supply of skilled workers in the hospitality industry. The demand and supply are further cross-tabulated along with regions, gender, and educational level.

Figure no 4, has provided educational level wise supply and demand shares in the existing job market. The B-Tech and DAE have no demand, nor its supply was strong enough to pull the job attractions. Around 20% of diploma holders are demanded by the market, but unfortunately, the supply side is very limited and only 2% supply is available. This 18%of supply and demand error is the potential job market for diploma holders and can be filled with policy decisions. The certificate demand and supply is very prominent in the market and it crosses 43% of both demand and supply side and representing the major chunk in the job market. Importantly, the market demand of skilled workforce is considerably filled from the supply side at the certificate level. Short courses have also performed well and attracted 37.3% of the job market, but the supply side needs to be rationalized as the current supply provided to the market is 55% percent which created a superfluous resource in the market which may add to the unemployment. Keeping in mind the market demands of different technical qualifications and supply of the relevant skills, and knowledge, two important decisions shall be taken;

- The supply of diploma holders shall be raised in the market to fill the existing 18% of the gap.
- The error between demand and supply of short courses shall be reduced from 14.7% to 0% to avoid superfluous resources in the market and rationalize the demand and supply in the market, which may have a positive impact on gaining full employment.

Province & Level Wise Skilled workforce demand

The educational standard wise provincial distribution of the labor force is reported in figure no5. The market need was classified with the majority around various certifications in AJK, Baluchistan, KP, and Punjab. While GB and Sindh show more demand for short courses. The demand for skilled workers between the first and 2nd preference of various provinces also shows unequal variations. The percentage change in demand for a certificate and a short course for Baluchistan is almost 52% in favor of certificate demand, while for KP this error is just 20%, in Punjab, it reduced further to a mere 0.4% while in Sindh province the difference is 20.4%. The lower difference between 1st and 2nd choice indicated for a more dynamic and progressive market where the opportunities are more readily available and are subject to exchange with a slight adjustment in skill level. The bottom line is the entire employment heralded around short courses and certification.

Gender & level wise demand of skilled workforce

The gender skilled workforce distribution in the job market is always skewed in favor of male workers. This is because of the lesser congenial work environment, stereotyping regarding lesser efficiency of female workers and other domestic issues. Further, cultural and societal norms, harassment and bullying are the other issues which deteriorated female participation in the labor market. Figure no 6, has provided a percentage classification of male and female employees across a different skill standard., the difference between male and female workers are reduced at a short course level, followed by certificate and diploma levels. The woman's presence in the skilled workforce can be increased by improving the working conditions. Legislation and implementation concerning work abuse, persecution, and exploitation will help a lot.

Province & Gender wise skilled workforce Demand

Figure no 7 has provided the gender share of the skilled workforce in the provinces. The percentage wise distribution of skilled workers in the provinces is showing higher female distributions for GB, Sindh, and Baluchistan. While, KP was, at worst, followed by Punjab and AJK by including female in their job markets. The lower gender concentration in skilled workers in the provinces has created many questions, which needs to be considered at the policy level. These are but not limited to;

- The lack of suitable works for a female in the Pakistani market.
- By contrary to the 1st point, if it is assumed that there are sufficient jobs available, then there may be many reasons contributing to such unfavorable situation in the provinces. E.g. insufficient and low-quality skills, cultural and behavioral barriers, and unfavorable working conditions.
- A detail, tracing study can sort out what are the exact reasons for not having female skilled workers at the job place.
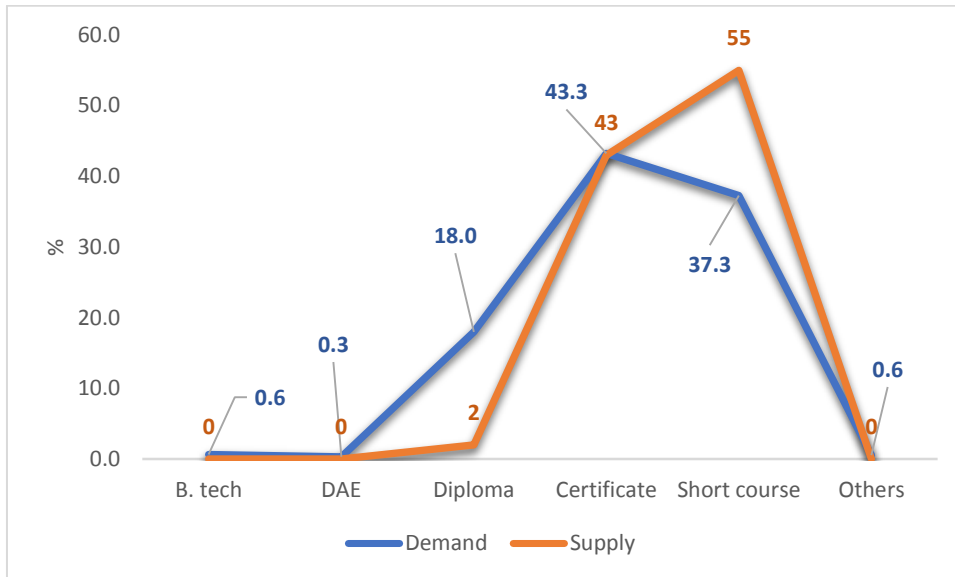
Figure 4: Level wise supply & demand gaps
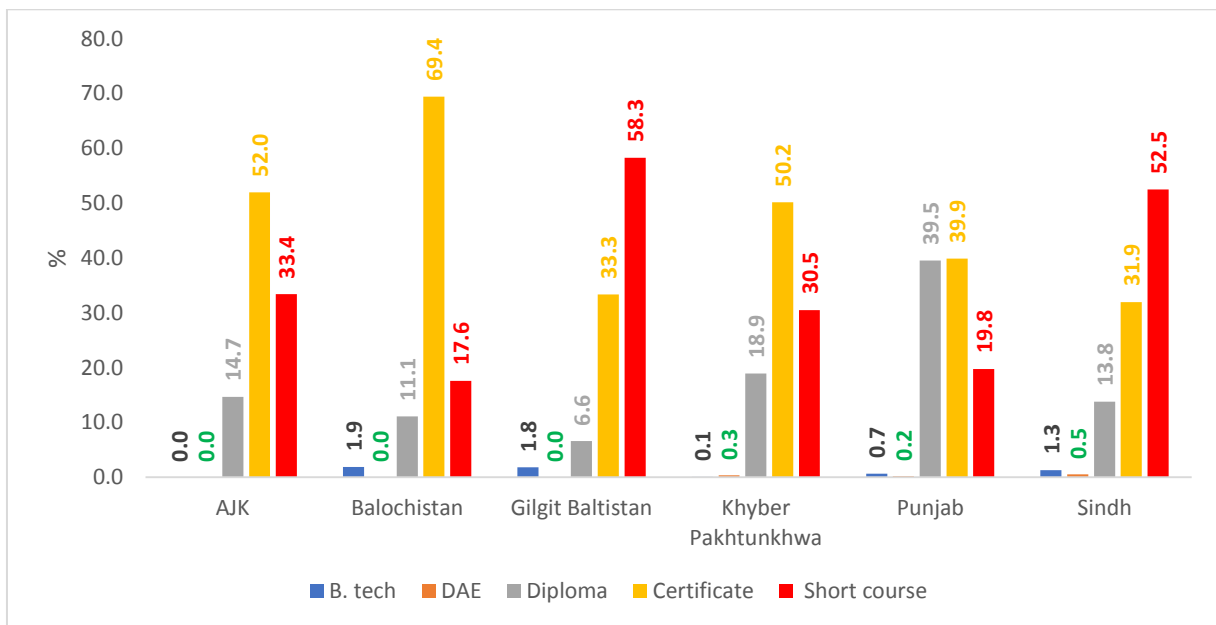

Figure 5: Province and Level wise Skills demand

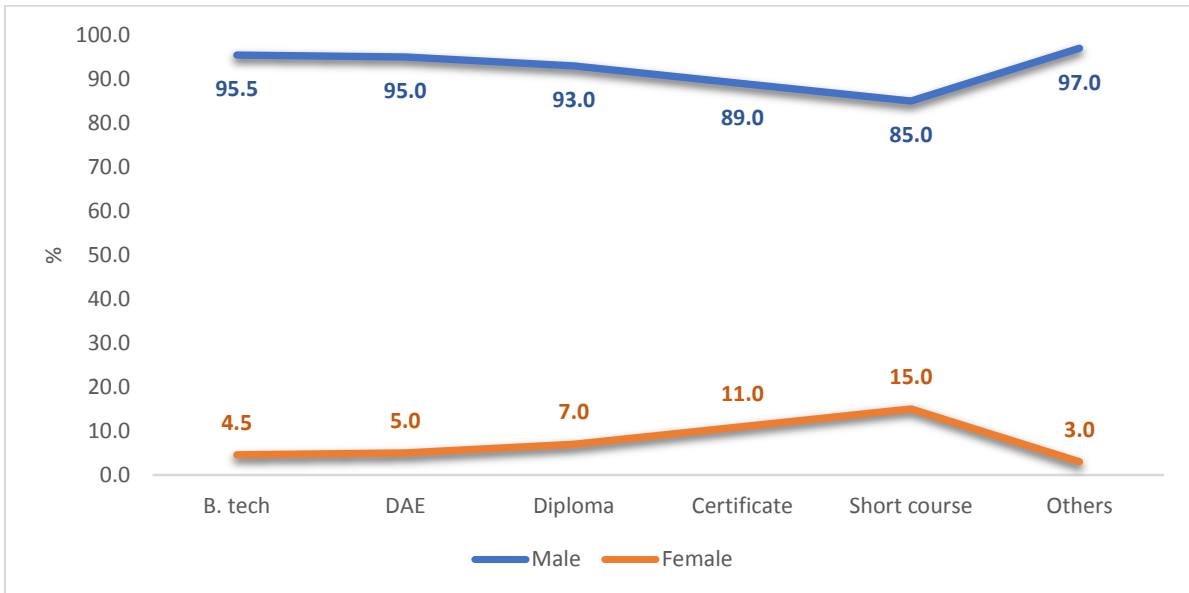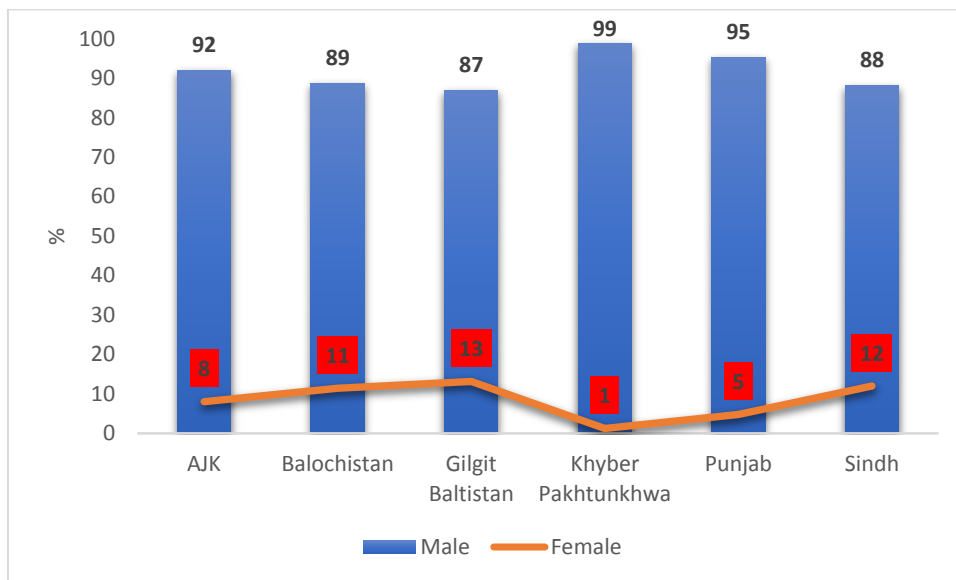**Figure 6: Gender and level wise demand**

Figure 7: Gender wise existing skilled workforce

Market Demand & Supply in the Hospitality Industry

Top 10 leading Trades in the Hospitality Sector

The hospitality sector is remarkably active, pine and challenging in terms of gainful employment. Broadly, the hospitality sector is broken down into four main divisions such as food & beverages, hotels & restaurants, traveling & tourism, café & clubs. These four segments created millions of job opportunities for skilled workers and the associated works and supply chain of these four divisions expanded the volume of jobs linked to the industry. Figure no 8, has presented a peek of some of the trades/skills/ jobs associated with the hospitality industry in Pakistan. The job market is influenced by waiters and Chefs, followed by restaurant managers, housekeeping and receptionist. However, these estimates apparently not speaking of jobs associated with traveling & tourism, café & clubs and jobs related to suppliers, which undoubtedly will increase the demand in the hospitality industry. The leading ten trades counted for almost 200,000 jobs in the hospitality industry. The job description of the most needed trades, i.e. waiters, chefs, and cooks is not greatly fancy and can simply be imparted at any TVET institutions.

Skilled workforce deficiency (Province wise)

Area wise, skilled workforce scarcity of the hospitality industry in Pakistan is presented in figure no 9. Interestingly the northern territories which are likewise distinguished tourism centers expected plenty of skilled workers. Starting from KP, which called for 94% of skilled workers, set up a monumental job market. The AJK & GB and Sindh also asked for skilled employees to include them in their job market. Interestingly, Islamabad, Punjab, and Baluchistan did not call for a skilled workforce. It might have two reasons, either these regions have sufficient skilled workforce or their hospitality industry is not very demanding. The high workforce demand, indicating the vibrant nature of the hospitality industry in Pakistan, which created exceptional job opportunities for local skilled workers. Based on the figure no 9, it can be construed with some qualms that the hospitality sector is considerable demanding in AJK, GB, and KP and the focus shall be relocated to these places without any wait.

Skilled workforce deficiency

Table no 1 at Annex-A has furnished details of most vital jobs/skills in the hospitality sector and skilled laborers availability against these openings in the local market. The analytics of demands of skills (available jobs) and the supply of skilled workers and the difference between the two in the form of Gaps, unveiling astounding findings. The entire table has shown 66 skills/jobs with peak demands of 261,000 and the accessible resources for the entire jobs are just 60,000, leaving 201,000 jobs vacant. While the top 8 jobs worked out for approximately 203,000 jobs and the available resources against the needed jobs are just 2500 having an unfilled 200,000 jobs. Instead of fixating on the full list of 66 jobs in the hospitality industry, the focus shall be on the leading eight jobs with immense employment potential to take up the squatting skilled workers. Namely, these high in demand jobs are waiters, chefs, cooks, restaurant managers, housekeeping, receptionists, room service, and delivery staff.

Skilled Workforce Deficiency (Current)

Table no 2 at Annexure has provided current deficient trades at the provincial level. There are 3426 vacant positions in the Hospitality industry in Pakistan with the majority of positions, laying unfilled in KP & GB followed by AJK and Sind. It is understandable that leading tourist stations are situated at

KP, GB, and AJK and hence the demand is likewise indicated in these areas. Trade wise, the stiffest requirement is revealed by waiters, cooks, housekeeping, managers, and chefs.

Availability of Local Skilled workforce

Figure no 9 has provided flicker an eyelid to recommend which part of the country takes the potential for enhanced hospitality businesses and which bears decreased. Figure no 10 provided data concerning the availability of the local skilled workforce. Every province receives a rich of local accessible skilled personnel. This surely paradoxical to the findings in figure no 8, where the provinces in loftier needs of the skilled workforce also advocating the availability of the local skilled personnel. Now, how to pack the demand for skilled workers in high potential zones from local skilled personnel is a policy question. How to make an effective job market shift and to surmount the quality of skills requirements rest with the policy makers. Figure no 10 gets revealed the percentage of the local skilled workforce. Except for AJK and Islamabad, where resident skilled laborers have a moderate availability while the other parts have a profusion of a local skilled workforce.

Employers Level of Satisfaction

Figure no 11 presented the satisfaction level of the employers from the existing skilled workforce. This indeed an exceedingly critical parameter to determine why the employers are not complied with local skilled workers and how to raise the employer satisfaction from the local skilled workforce. A bigger percentage of the employers (employer satisfaction level) indicating "do not know" choice in Islamabad, AJK, GB, KP, and Punjab. This has pointed out for lesser know-how of how to measure the potency of skilled workers. However, the difference between satisfied and not satisfied in some instances has not established a very distinct divergence. In Islamabad, the employer is not demanding the new skilled workers (figure no 9), and the employers are satisfied as well. In the AJK, the employer is in high demand for skilled workers (figure no 9), the skilled workers are locally available (figure no 10) and the AJK employer is satisfied with the skills (figure no 11) but the transition of skilled workers to the local job market is a big issue to meet the created demand. Same is the situation of GB, Baluchistan, Sindh, and Punjab, While KP's employers are a bit perturbed with existing personnel, indeed locally available to meet the higher deficiency (figure no 10).

From figures no 9, 10 & 11, it is accomplished, that all provinces have somehow demand for skilled workers, these laborers are locally available, but the transition to the local market is an issue, while in KP the employers are dissatisfied with available skilled workers and their quality become an issue.

Figure 8: Top 10 leading Trades in Hospitality sector (Number)

Trade	Number
Waiter	55550
Chef	54892
Cook	37381
Manager Resuturant	15803
House Keeping	14885
Receptionist	14405
Electrician	4900
Professional Chef	4124
Plumber	3788
Hotel Management	2970
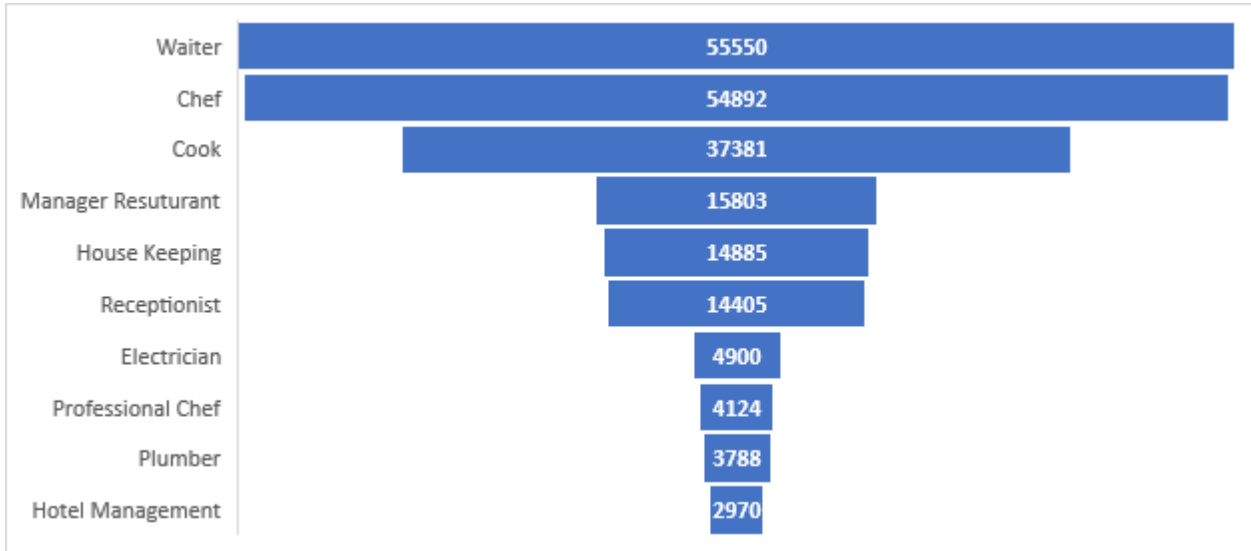
Figure 92: Skilled workforce Deficiency

Region	No	Yes
Islamabad	99	1
AJK	44	56
GB	31	69
Balochistan	84	16
Khyber Pakhtunkhwa	6	94
Sindh	48	52
Punjab	82	18
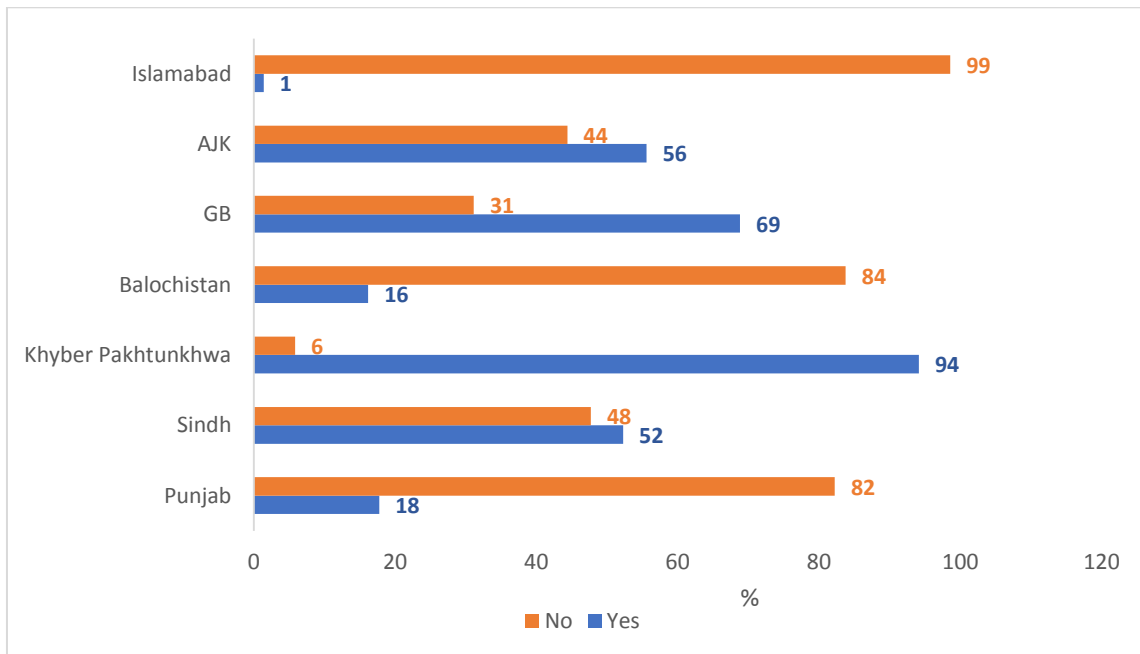
Figure 30: Local Skilled workforce availability
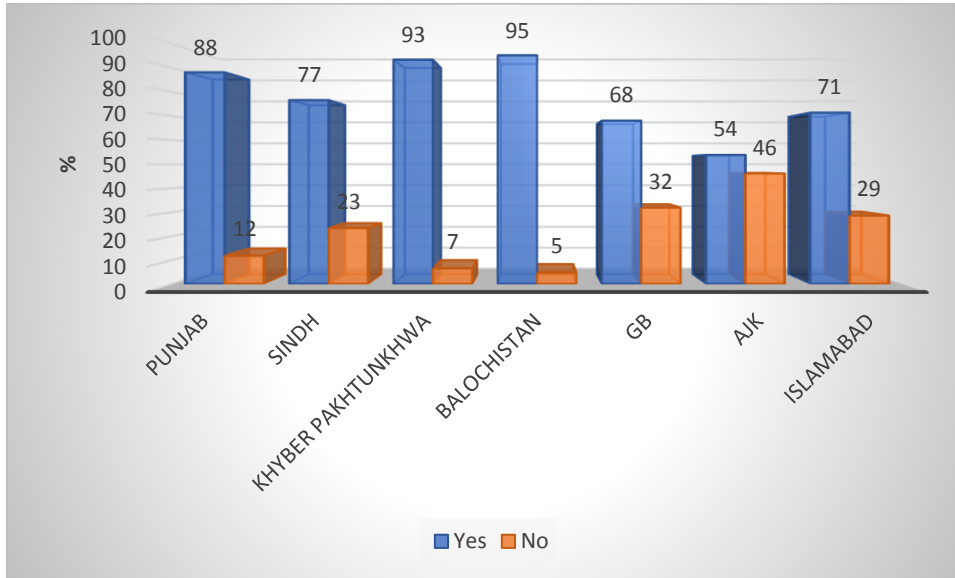
Figure 11: Employers Level of Satisfaction
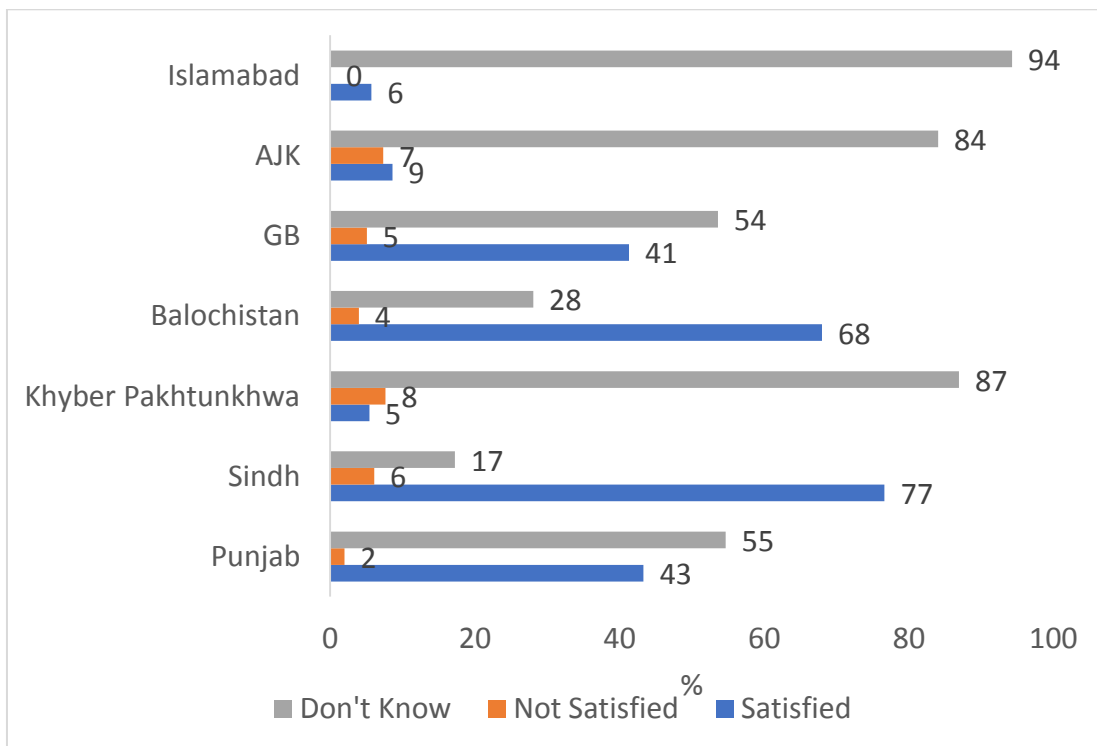
Prior Knowledge about TVET (Technical & Vocational Training) & TVETA/PVTC

It is imperative to perceive the TVET education before placing a skilled worker in one's workforce. Figure no 12 has given region wise percentage investigation of awareness about TVET. Interestingly, KP has led the question with 57% of the yes, pursued by Sindh, GB and Islamabad. Baluchistan carries the flattest figure with just 16% knowledge about TVET and the prop gets no opinion what TVET is all about. Lack of TVET knowledge implies for not picking up a proper job description and fit person to fill the right catch. Further, a detailed knowledge of TVET for both employers and employees can enhance gainful employability. Figure no 13 has brought details of replies on previous knowledge about TVETA and PVTC. KP again has led with 77% of respondents have previous knowledge of TVETA and PVTC. Sindh & AJK have also larger percentages while Baluchistan & GB respondents reported fewer percents of previous knowledge about TVETA and PVTC.

In figure no 12 & 13, the respondent's paucity of prior TVET knowledge has uttered many challenges of the prevalent condition of TVET in Pakistan. The dearth of knowledge leads to an absence of understanding of the local labor market and hence added to unemployment.

Figure 12: Knowledge about TVET
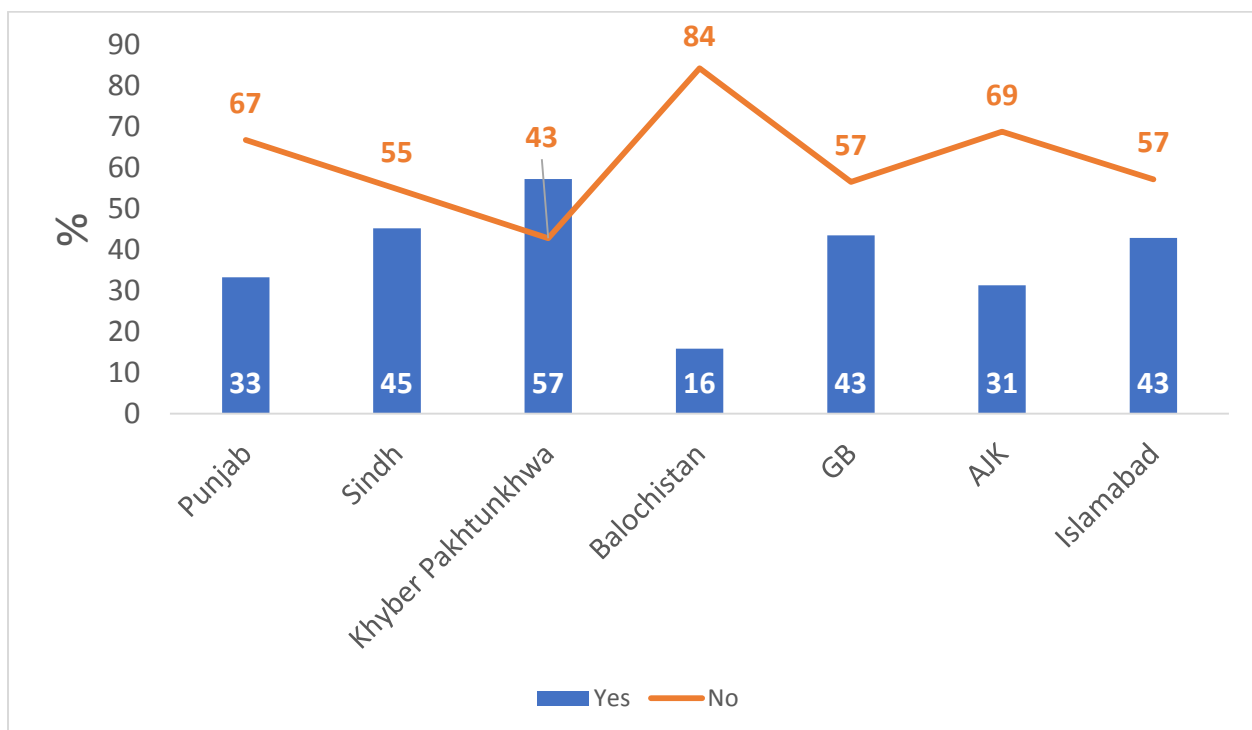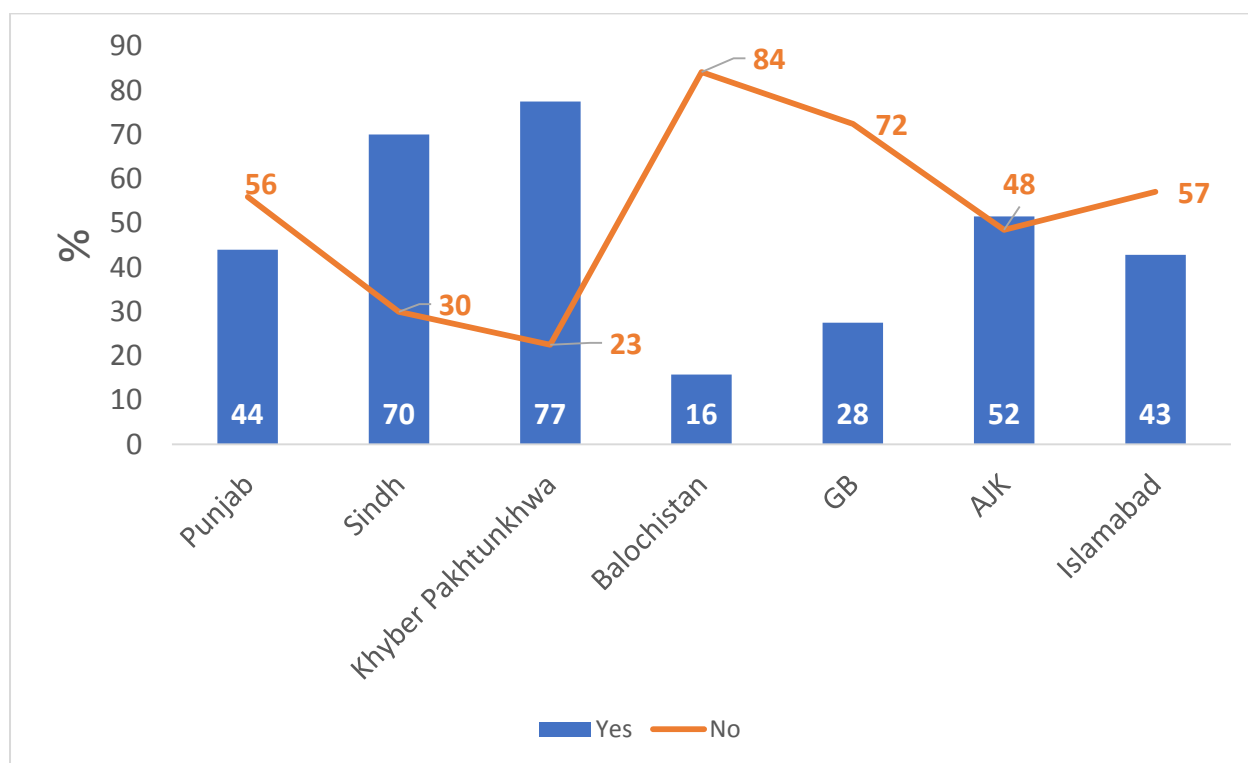
Provincial Skills gaps Analysis

Analytics of the supply and demand of skills/jobs gap analysis of provinces are presented in figures no 14 to 19. The supply and demand of skills for Punjab has various variations, producing the strong potential for employment. The demand for skills such as housekeeping, Chefs, plumbers, Receptionists, and Waiters are remarkably significant while the supply is exceedingly flat, hence, generated the colossal potential for employment. However, the supply of drivers, DAE electrical, plumbers and electricians are high in Panjab, and the demand is at the lower part, setting up a negative impact on job placement.

Table No 15 showed the tendency in the Sindh's demand and supply of the labor market. The trend has demonstrated a drop, with job sophistication, i.e. cooks with lesser job variety and academic needs are in high interest in Sindh, while trained Chef and restaurant manager get a less demand. Further, a potential exists for cook, waiter, delivery boy, and pizza maker. On the supply front, all the professions are at lower side except computer operators. Hence producing any of the said skills will have rich chances of seeing hired.

Interesting findings for KP is evinced by a figure no 16. Demand for professions such as manager-restaurant, professional chef & cooking, waiter and receptionist are very high while the supply is inhibited. It is in contrast with the findings of Sindh, where the delicate job description got a lesser demand. The demand for waiters and managers have touched 16,000 and 13,000 marks while the supply of the jobs just received fewer than 100 laborers for each of the jobs. This immense divergence in supply and demand indicated for vast capacity in the hospitality industry in KP.

Baluchistan Job market demand and supply data are provided in figure no. 17. Conferring to the analytics, Chefs, Cooks, electricians, receptionists, and the waiters have massive potentiality in the hospitality sector of Baluchistan. The demands have struck a cumulative level of almost 10,000 jobs. Indeed, very prolific job market sketch, put in perceiving the resource crisis and the nascent structure of the province. The supply side is not greatly vigorous, and it just returns to the market demand in electrician & cooks, however, the match is just below the 100 laborers allowing a huge potential to be permeated by the TVET graduates in the future. The response function in the trade of a plumber is very trifling and inept as the plumbing has not shown notable demand in Baluchistan.

Figures no 17 & 18 have presented the demand and supply of various trades in GB and AJK. The demand and supply figure for GB is evident and congruence in some cases. Higher demand in computer operators and plumbers are reacted with a mediocre supply with similar spikes. While, less demand in drivers, office assistants, sales officers, front desk officers, and maintenance technicians are answered with lower supply. However, the huge potential existed for the chefs, housekeeping, and restaurant managers, where demand is very high and the supply is not market-based.

In the AJK the skills demand and supply gaps are strong for chefs, housekeeping, receptionists, tour-guides and waiters creating employment potential. The supply side is trivial and has not crossed 100 laborers for oftenest of the occupations except the IT technician which are posted around 250. The total jobs the AJK's hospitality sector has crossed 15,000 marks (approximately) and the supply side is just around 500. The supply & Demand gap makes the AJKs market unusually alluring for TVET graduates (in hospitality sector) and for the policy makers.

Figure 5: Gap Analysis Punjab
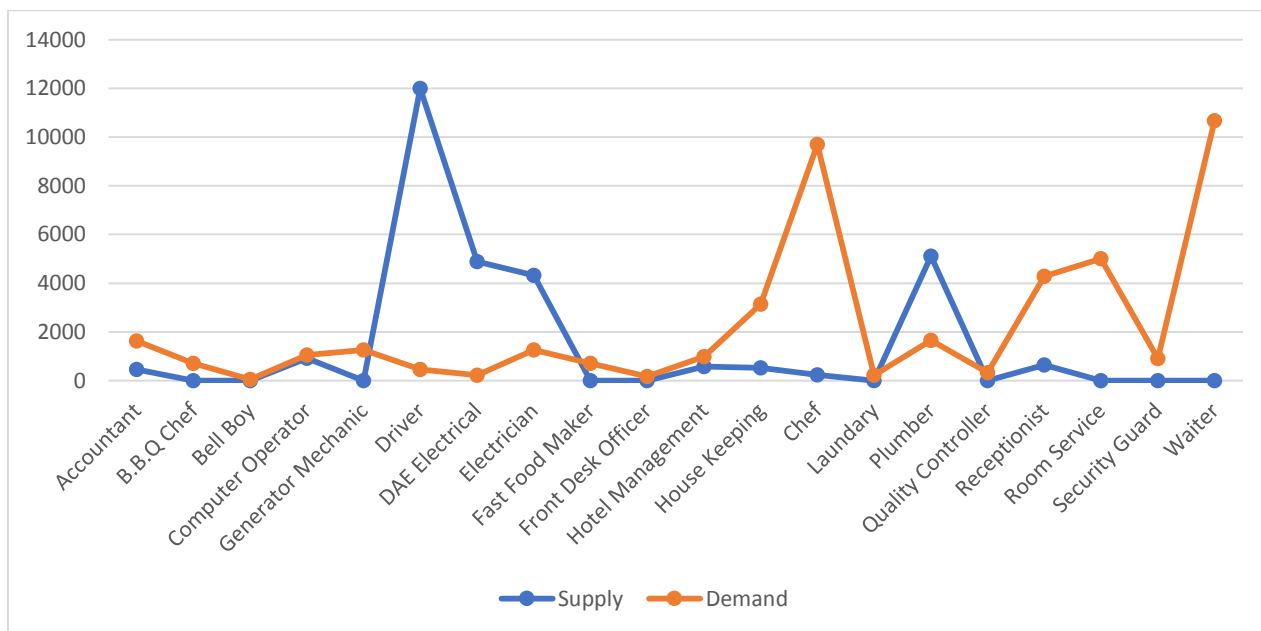
Figure 6: Skills Gap Analysis Sindh
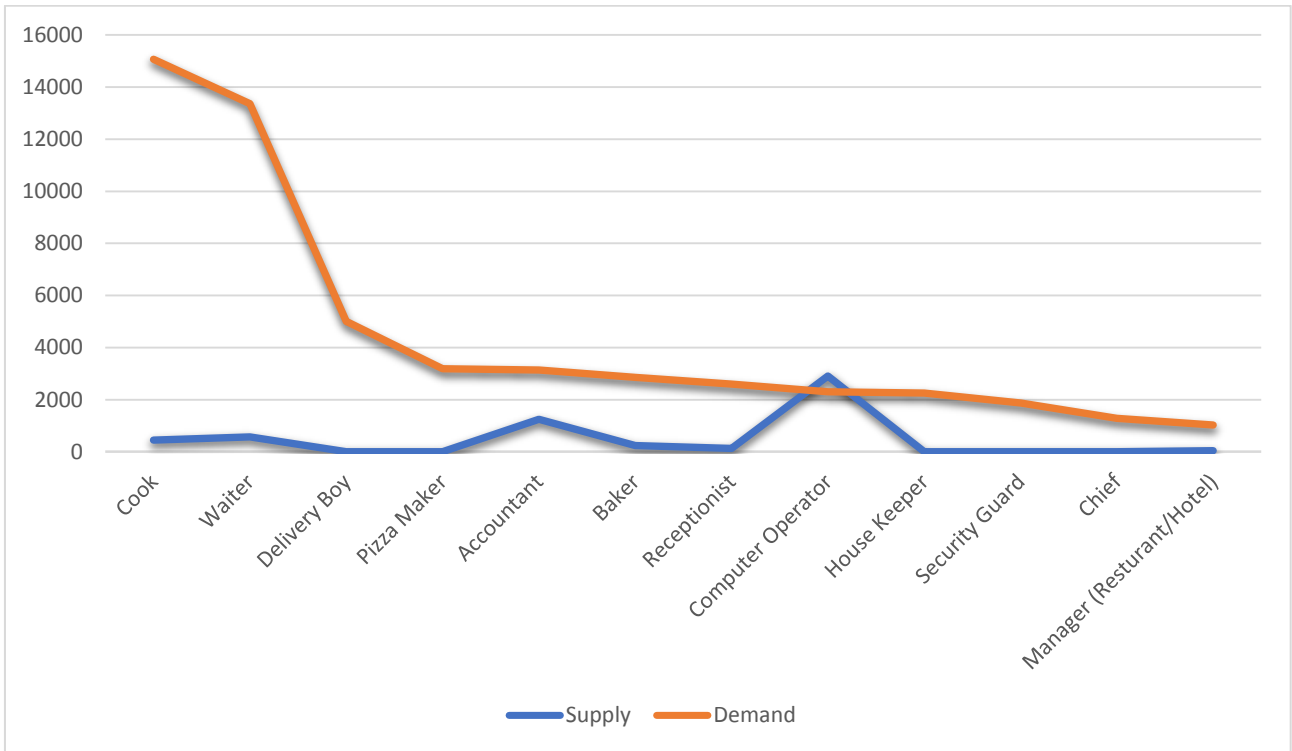
Figure 7: Gaps Analysis KP
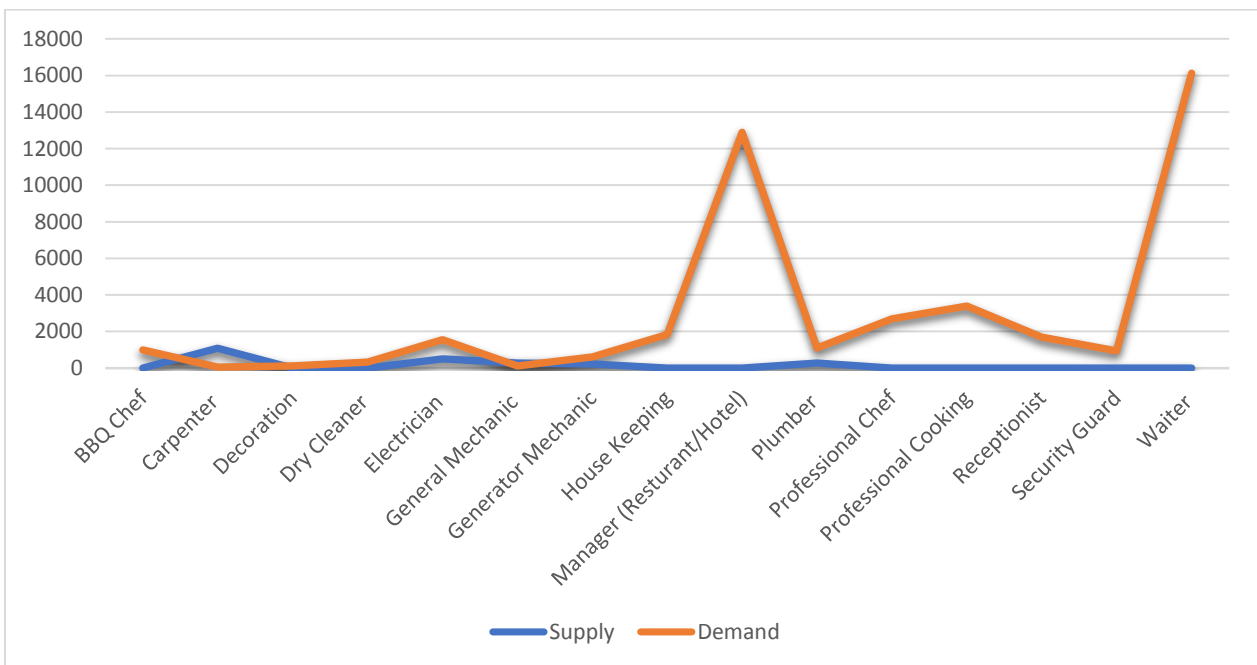
Figure 8: Gaps Analysis Baluchistan
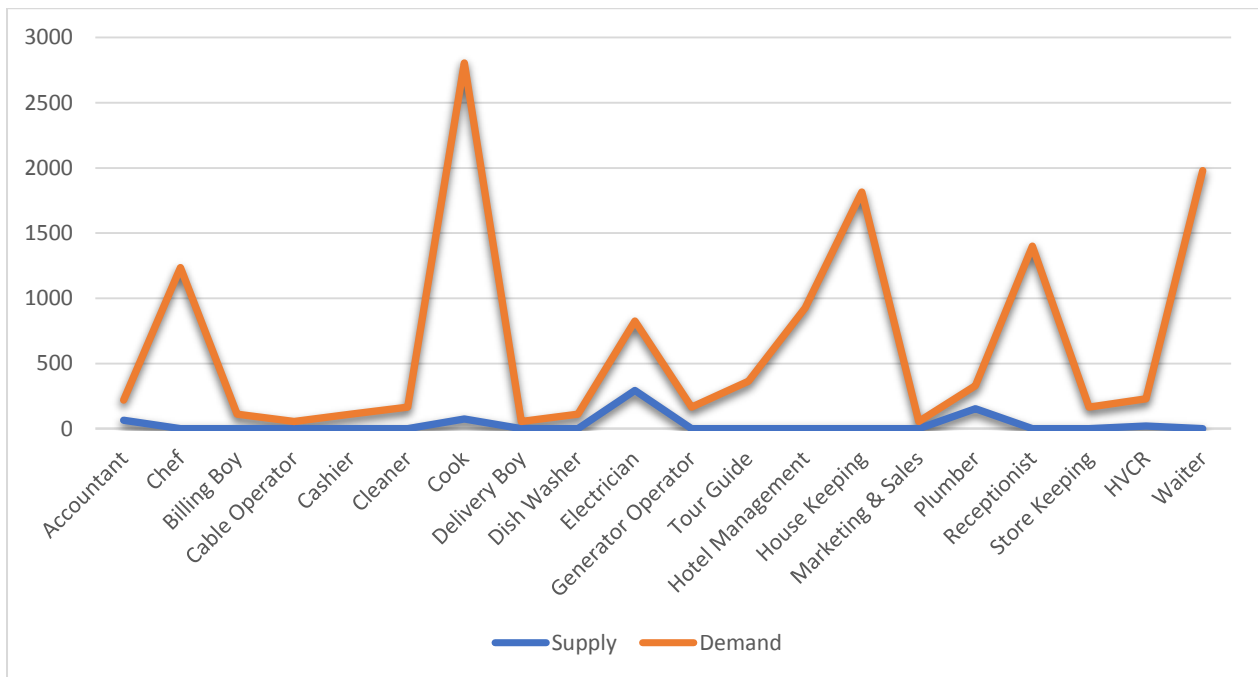
Figure 9: Skills Gap Analysis GB
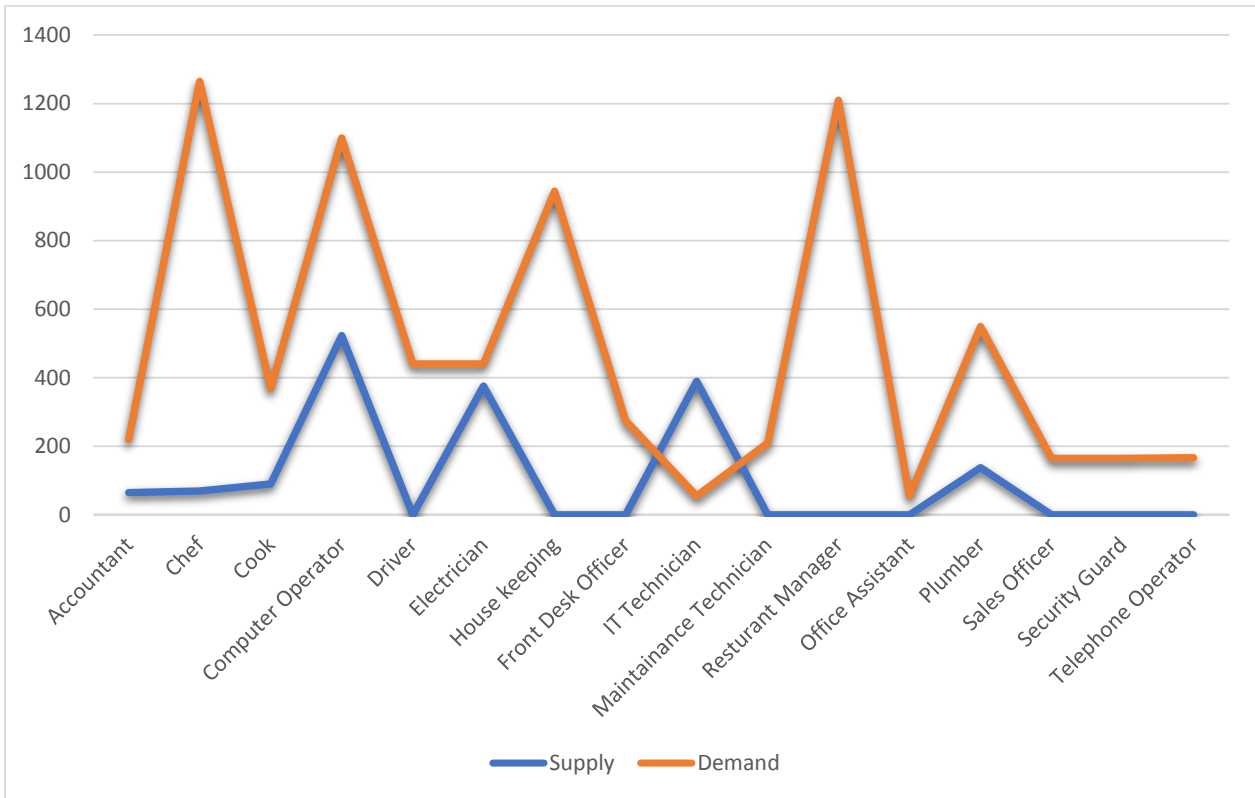
Figure 10: Skills Gap Analysis AJK
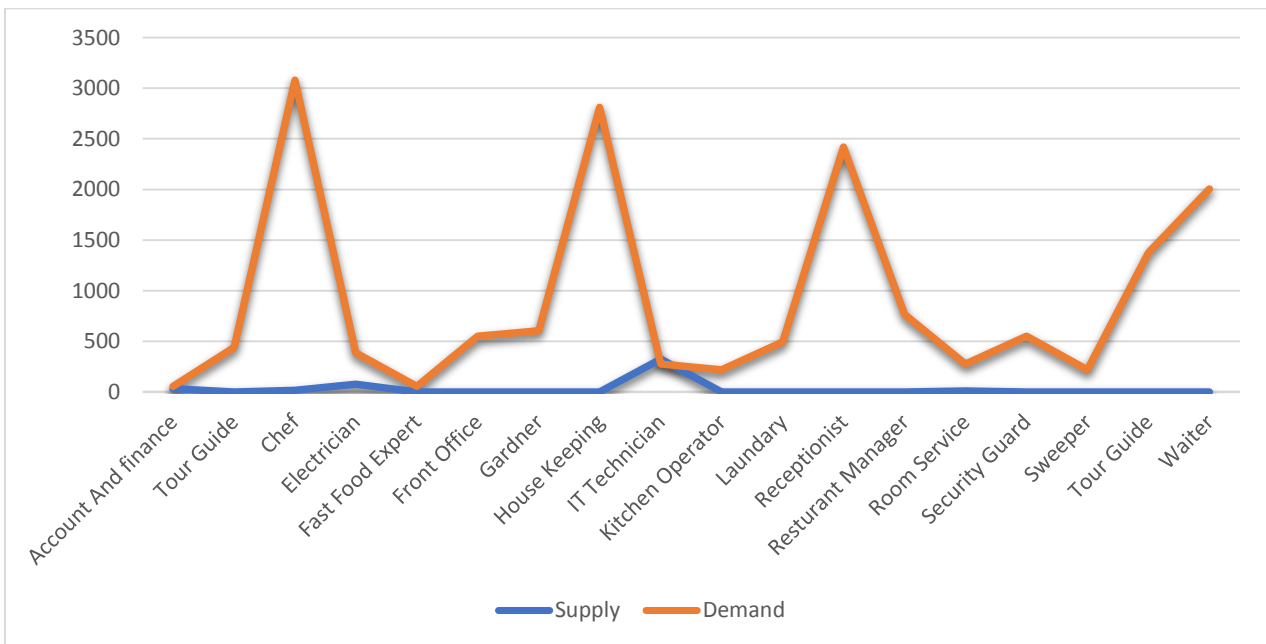
Conclusion & Way Forward

The study has shown the potential and gray zone of employment linked to the hospitality sector. The study reports a great potential for employment in the hospitality sector, but the supply of skilled workers is minimal. The women partaking in the job market is also negligible and many social and economic barriers were associated with women's lesser participation. There are likewise some issues with the quality of education imparted by the TVET institutions and these are not in line with the employer's perceived quality. Most of the long duration courses in TVET not receiving an appropriate place in the local hospitality industry and higher demand are linked with certificate & short courses. Region-wise, most of the employment is available in the northern areas, AJK and KP. These territories are distinguished for their hospitality businesses and tourist destinations. Likewise, the standing demand can be dealt with if the supply of skilled workers in simple trades such as waiter, chef, cook, restaurant manager, and room service is increased. Even the employment can be raised if the other segments such as Bar & Cafe, suppliers, etc. demands are considered and converted the entire hospitality industry into a value chain. For the growth of the Pakistani's hospitality sector, the succeeding initiatives are recommended.

1. Diploma holders shall be raised in the market to capture the existing demand and to fill the 18% supply & demand gap.
2. The error between demand and supply of short courses shall be reduced from 14.7% to 0% with immediate effect to avoid superfluous resource in the market and rationalize the demand and supply in the market. This rationalization will have a positive impact on gainful employment.
3. The excessive supply can be diverted to the international market.
4. Baluchistan has shown a higher percentage of demand and supply error for certificate courses and it creates a window of potential employment, where the supply can be increased up to 52%.
5. The KP & Sindh have also indicated a 20% of potential for employment if the certificate courses are increased.
6. Women's participation in the workforce can be increased by improving the working conditions, legislation regarding exploitation, harassment, and bullying, offering courses regarding women jobs in demand, specifically certificate and short courses.
7. Based on figures no 10 it can be deduced that the hospitality sector is very concentrated and demanding in AJK, GB and KP and the focus shall be shifted to these regions without any delay for higher employment.
8. There is an abundance of local skilled workers, but transiting them to employers is a policy question. How these skilled labor can be up to the mark and satisfy the requirements of the employers and the mobility of these labors from training institutions to the markets, required a dynamic partnership and mechanism.

Annex-A

Supply & Demand Gaps Analysis (future)

Table no 1: Supply & Demand Gaps Analysis

Trade	Supply	Demand of Hospitality Sector	Gaps
Waiter	247	55550	(55,303)
Chef	590	54892	(54,302)
Cook	811	37381	(36,570)
Manager Restaurant	60	15803	(15,743)
House Keeping	349	14885	(14,536)
Receptionist	389	14405	(14,016)
Room Services	0	5390	(5,390)
Delivery staff	0	5115	(5,115)
Electrician	6532	4900	1,632
Professional Chef	811	4124	(3,313)
Plumber	6243	3788	2,455
Computer Operator	12352	3455	8,897
Security Guard	869	3080	(2,211)
Hotel Management	128	2970	(2,842)
Supervisor (Dying & Bleaching)	0	2915	(2,915)
Baker	236	2860	(2,624)
Accountant	977	2805	(1,828)
Quality Control food	0	2805	(2,805)
Kitchen Operator	0	1945	(1,945)
Tour Guide	0	1765	(1,765)
Cashier	0	1760	(1,760)
Front Desk Officer	188	1320	(1,132)
Generator Operator	394	1155	(761)
Food and Beverages	927	990	(63)
Driver	797	935	(138)
Event Manager	0	935	(935)
Floor In charge	0	880	(880)
Laundry	0	880	(880)
IT Technician	751	834	(83)
Office Assistant	1377	715	662
Dish Washer	0	660	(660)

Trade	Supply	Demand of Hospitality Sector	Gaps
Dry Cleaner	0	660	(660)
Generator Mechanic	552	610	(58)
Gardner	0	605	(605)
Record keeper	0	605	(605)
Security Manager	0	550	(550)
Telephone Operator	0	495	(495)
Camping Expert	0	440	(440)
Cleaner	0	440	(440)
Decoration	0	440	(440)
Lift Technician	0	440	(440)
Chef-Helper	0	390	(390)
Food Manager	0	387	(387)
Marketing & Sales	154	1046	(892)
Maintenance Supervisor	201	385	(184)
Store Keeping	0	332	(332)
CCTV Technician	0	220	(220)
Control Room Operator	0	220	(220)
DAE Electrical	16810	220	16,590
Outdoor Order Taker	0	220	(220)
Life Guard	0	165	(165)
Restaurant Staff	0	165	(165)
Health & Hygiene	0	115	(115)
General Mechanic	425	110	315
Packing Services	0	110	(110)
Web & Graphic designer	1262	110	1,152
Cable Operator	0	70	(70)
Network Technician	351	56	295
Carpenter	2529	55	2,474
Cooking Helper	0	55	(55)
Foreman	0	55	(55)
General Manager	0	55	(55)
Public Relation	0	55	(55)
Reservation	0	55	(55)
Temperature controller	0	55	(55)
Web Developer	2904	45	2,859
Grand Total	60216	261933	(201,717)

Deficient Trades (current)

Trade	AJK	Baluchistan	GB	KP	Punjab	Sindh	Grand Total
A.C Mechanic		2		4	12	1	19
Accountant	1	4	3		10	16	34
Auto Mechanic			5				5
B.B.Q Maker	41				3	3	47
Baker						3	3
Bengali Food Maker	1						1
Bar B Q				8			8
Biryani Maker	3						3
Cashier			3			19	22
Chef		26	92		14	4	136
Chinese Chef	89				27		116
Cleaner	1				15		16
Computer Operator	1	13	5			27	46
Continental Food Maker	28				4		32
Cook	4	1	97	416	14	101	633
Cooking & Baking				14			14
Cultural			1				1
Customer Relationship Officer						6	6
Delivery boy						5	5
Dish Washer	3		6	13	4		26
Dispenser				1			1
Driver					2		2
Dry Cleaner				2			2
Electrician	15	16	35	19		3	88
Event Manager			4			6	10
Fast Food Maker	28		2		12		42
Floor In charge						5	5
Food and Beverages			42	2			44
Fried Rice Maker	1						1
Front Desk Officer						2	2
Front Office			6				6
Gardner		1	2				3
Generator Operator	3				15	2	20
Helper					1		1
Hotel Clerk						2	2
Hotel Management	8						8
House Keeping	10		315	13	11	5	354
Italian Good Maker	9				6		15
Jalfarezi Maker	3						3

Trade	AJK	Baluchistan	GB	KP	Punjab	Sindh	Grand Total
Kabli Pullao Maker	2						2
karri Pakora Maker	2						2
Kashmiri Food Maker	103				11		114
Kitchen Operator			4		12	6	22
Laundry			1		2		3
Lift Technician						2	2
Management	2						2
Manager	3	11	144	164	2	6	330
Marketing & Sales	1					2	3
Mutton Karhai Maker	1						1
Nihari Maker	4						4
Office Assistant						1	1
Order Taker	2						2
Outdoor Order Taker	4						4
Pak Food Maker	12				2		14
Pastry Maker							0
Pizza Maker	1						1
Plumber	10	21	16	4			51
Professional Chef				44			44
Professional Cooking				6			6
Public Health (B. Tech Pass)				1			1
Qourma Maker	6					4	10
Quality Control						4	4
Receptionist	27		45	21	20	10	123
Restaurant Manager			6			3	9
Room Service	1		5		52		58
Russian Food Maker	3						3
Russian Salad Maker	1						1
Sales Manager			2			1	3
Security Guard			12	20	8		40
Security In charge	1					5	6
shift Manager			2			3	5
Stem Roast Maker	1						1
Store Keeping	1			11			12
Supervisor (Dying & Bleaching)		1		18			19
Tandoor chi	6				6		12
Telephone Operator			8				8
Tikka Maker	1						1
Tour Guide			7				7
Traditional Food Maker	1						1
Trained Waiter	45		209	346	58	49	707
Weaving Machine Operator				2			2

Trade	AJK	Baluchistan	GB	KP	Punjab	Sindh	Grand Total
Web Developer						3	3
Grand Total	**490**	**106**	**1069**	**1129**	**323**	**309**	**3426**

Annex-B

Questionnaire

Skilled Workforce Demand Side Questionnaires

This information supplied on this format will kept strictly confidential and will be used for research & Planning of National Skills Information System, NAVTTC, Government of Pakistan

Name of organization: _____

Dated: _____for the Year: _____ Organization Contact No: _____

Email: _____ _____ Address of the establishment _____

Name of focal person: _____ Contact no: _____

Sector: _____ Sub-Sector: _____

Existing Skilled Workers (Only Skilled workers)

S.N	Trade Name	No. of workers		Source Codes									
				Male					Female				
		Male	Female	1	2	3	77	Specify in case of other	1	2	3	77	Specify in case of other
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													
11													

12

Code: 1- TVET Graduate, 2- Work based learner, 3- Informal sector, 77- Others (Specify)

2. Skills deficiencies

2.1: Do you face local skilled workforce deficiencies?   1= Yes   2= No (Go to Q.3)

2.2: In case of Yes (Trade and level wise Number)

S.N	Trade name	Level (use codes)							Number
		1	2	3	4	5	77	Specify in case of other	
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									

Codes: 1: B. Tech, 2: DAE, 3= Diploma, 4= Certificate, 5= short course, 6= others (Specify)

3. Future Skills requirement

S.N	Trade Name	Source Codes													Number/Annum	
		Male						Female								
		1	2	3	4	5	77	1	2	3	4	5	77	Male	Female	
1																
2																

3																
4																
5																
6																
7																
8																
9																
10																
11																
12																

Codes: 1: B. Tech, 2: DAE, 3= Diploma, 4= Certificate, 5= short course, 6= others (Specify)

3.1: What is your level of satisfaction from the TVET graduate? **1= Satisfied, 2= Not Satisfied, 3=Don't Know**

Q3.2: Are you agree with the statement that Skilled Workforce Supply meet your requirement?

1 = Yes   2 = No

Q3.3: If "No", what are the reasons? _____

Q3.4: Do you know about TVET (Technical education & Vocational Training)?

1 = Yes   2 = No

Q3.5: Do you know about TEVTA/PVTC?

1 = Yes   2 = No

Q3.6: What is your Suggestion improvement?_____

_____

Name of Enumerator: _____Signature: _____

Name of Data entry operator_____ Status: _____ (Enter/Rejected)