

## SENTIMENT SURVEY: THE EFFECTS OF COVID-19 ON HOSPITALITY & TRAVEL INDUSTRY STAFF AND OWNERS

*"It will take a long time to recover  
and we might not stay afloat."*

*"That Philippine borders will be  
closed for my target audience;  
foreign guests."*



# MYRANGGO

YOUR HOSPITALITY HUB

In June 2020 MY RANGGO launched a survey for Hospitality and Tourism professionals and owners to establish how the COVID-19 Pandemic and ECQ (Enhanced Community Quarantine) is affecting them, their jobs and their business.

8.26 Million Tourists visited the Philippines in 2019; a 15.24% growth on 2018's visitors. The tourism sector has, up until 2020, been a key economic driver of the Philippines with tourism revenue reaching a total of USD9.31 billion, in 2019.

Whilst a number of Tourism-based surveys have been launched in the Philippines, the majority focused on Industry Recovery or Confidence.

MY RANGGO felt it was equally important to hear the concerns and experiences of the people who work in the Hospitality & Tourism Industry, and those who own Businesses.

MY RANGGO is an internationally distributed in-print, on-line and digital magazine for the Hospitality & Tourism Industry in the Philippines.

Being the first of its kind in the Philippines, it is our fervent wish to foster a close-knit community within the hospitality, tourism and service industry which builds upon the synergies of those who get involved.

**172**

Total Number of People Surveyed



**93**

Hospitality & Tourism Professionals Surveyed



**79**

Hospitality & Tourism Owners, Senior Managers Surveyed



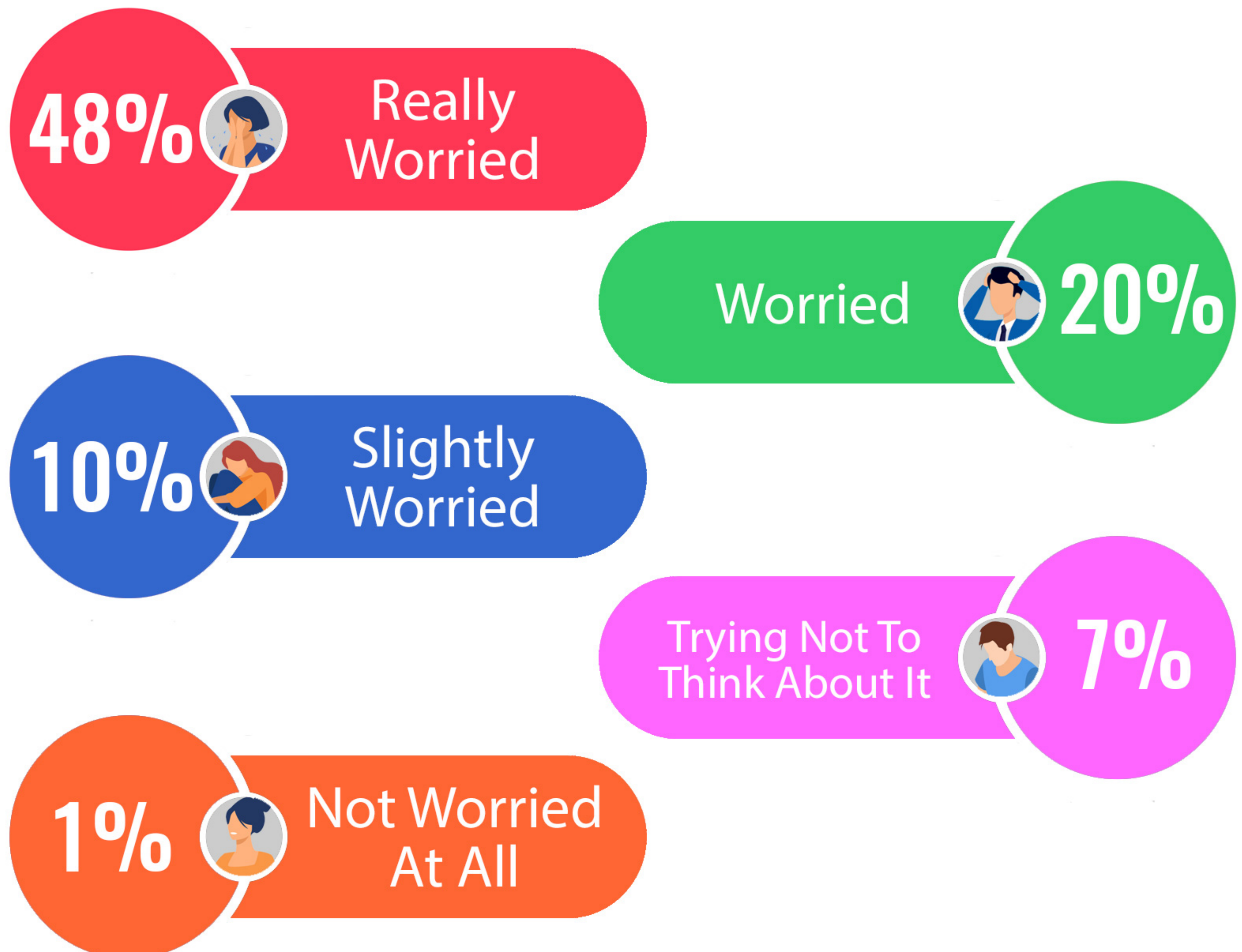
## INTRODUCTION

### HOSPITALITY & TOURISM INDUSTRY PROFESSIONALS AND OWNERS SENTIMENT SURVEY

We surveyed 93 Hospitality & Tourism Professionals, and 79 Owners to learn their thoughts, concerns and worries about the impact of the COVID-19 Pandemic and ECQ (Enhanced Community Quarantine) on their jobs, the industry they work in, and on themselves.

We hope that the insights in this document will be useful in identifying areas for support, not just for the Tourism Industry as a whole but for those who work within it or who own related businesses.

#### HOW WORRIED ARE YOU ABOUT COVID-19?

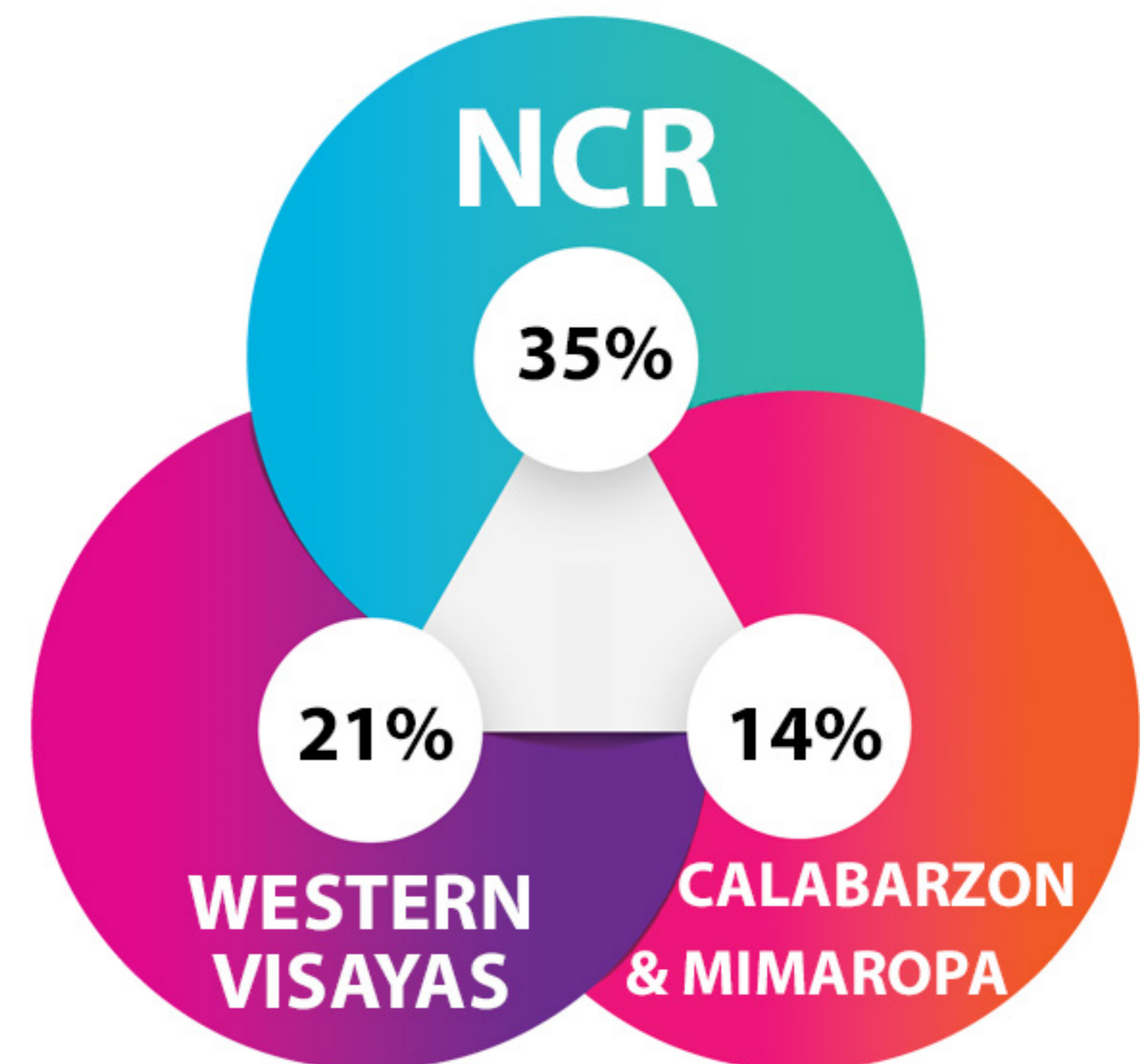
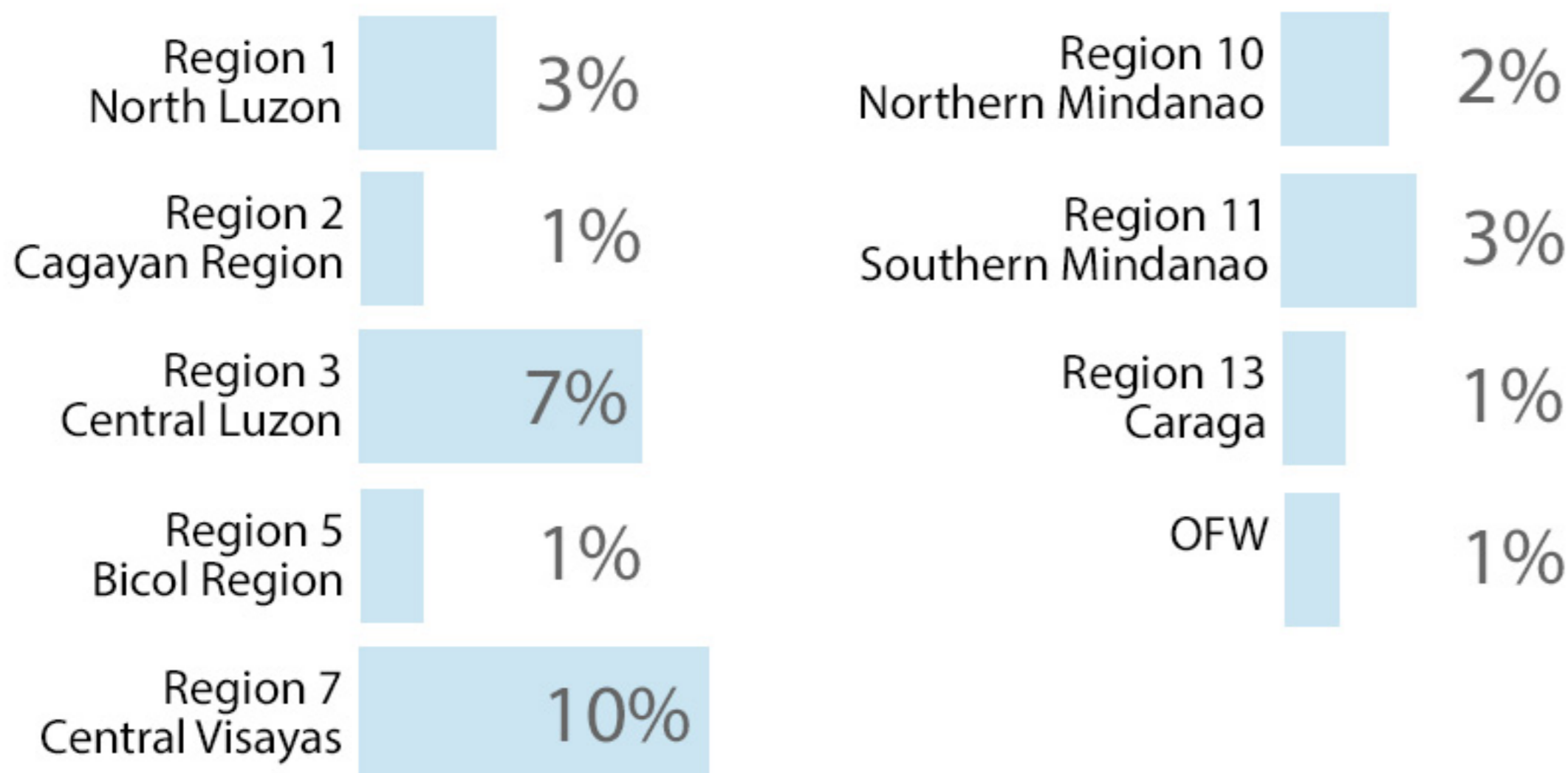


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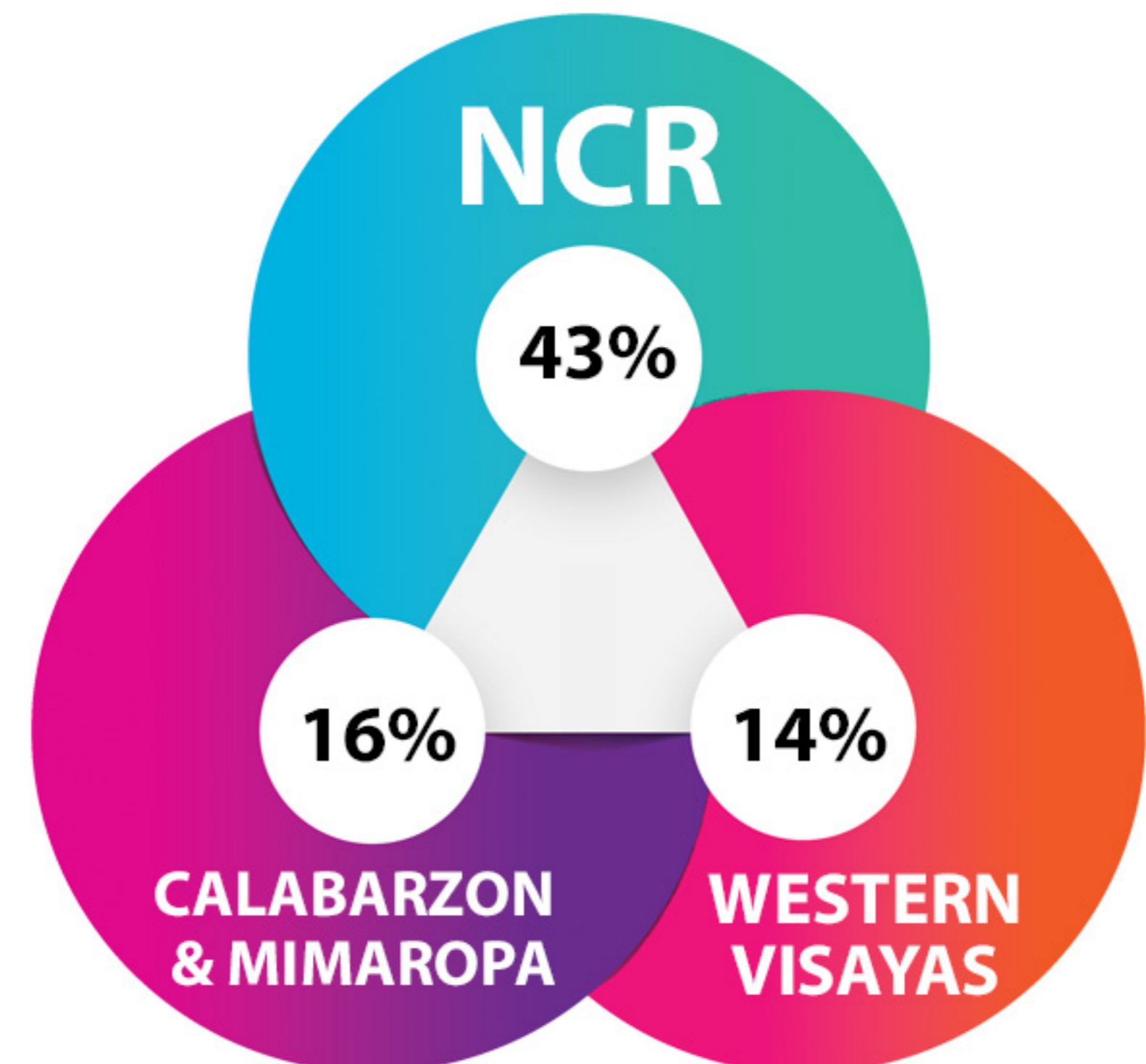
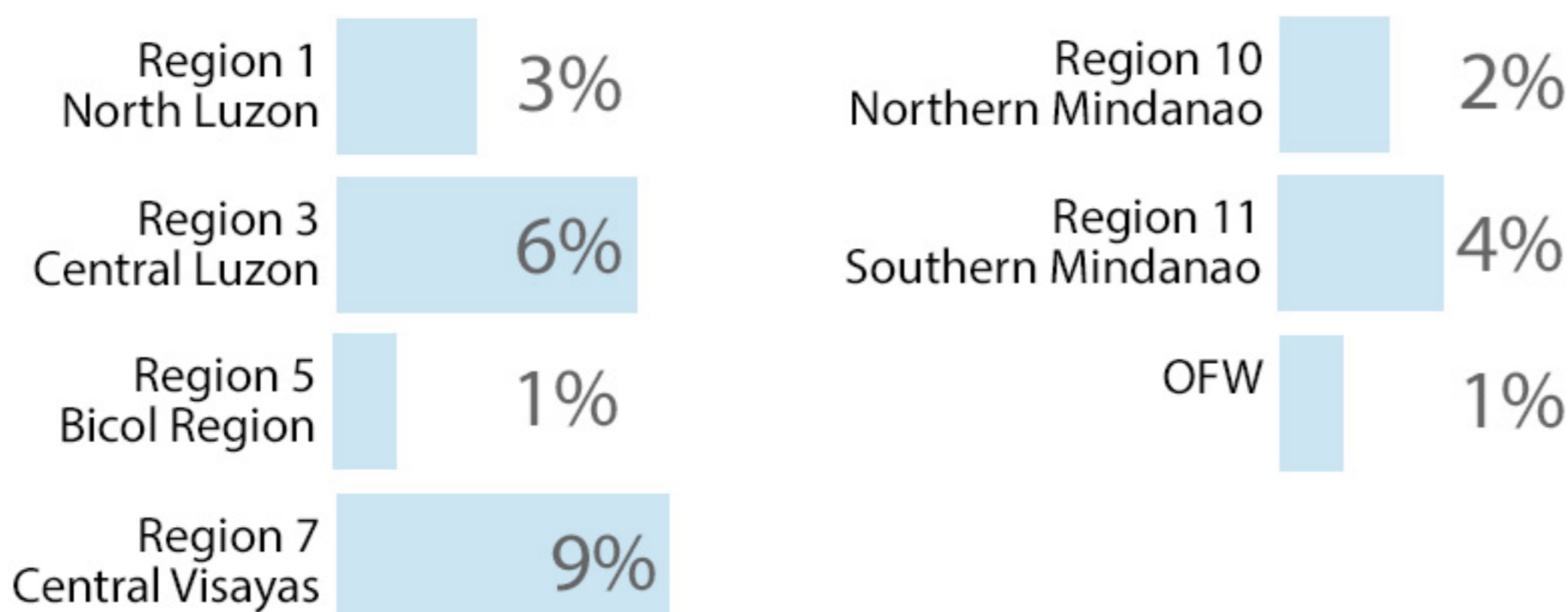
## 1. What Region Do You Work In Or Have A Business In?

The top 3 regions for people taking part in the survey were NCR, Western Visayas (Region 6) and Calabarzon & MIMAROPA (Region 4).



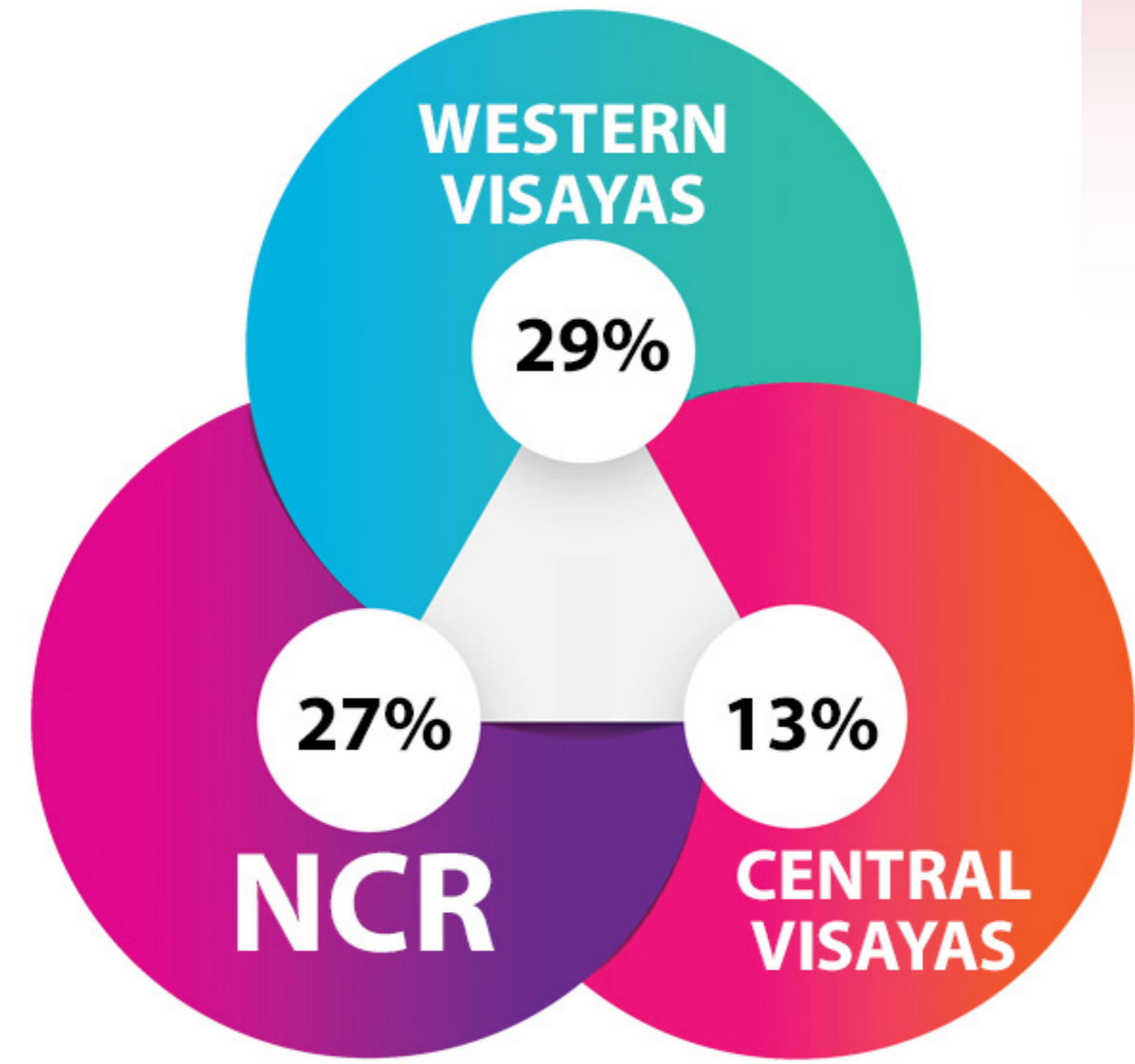
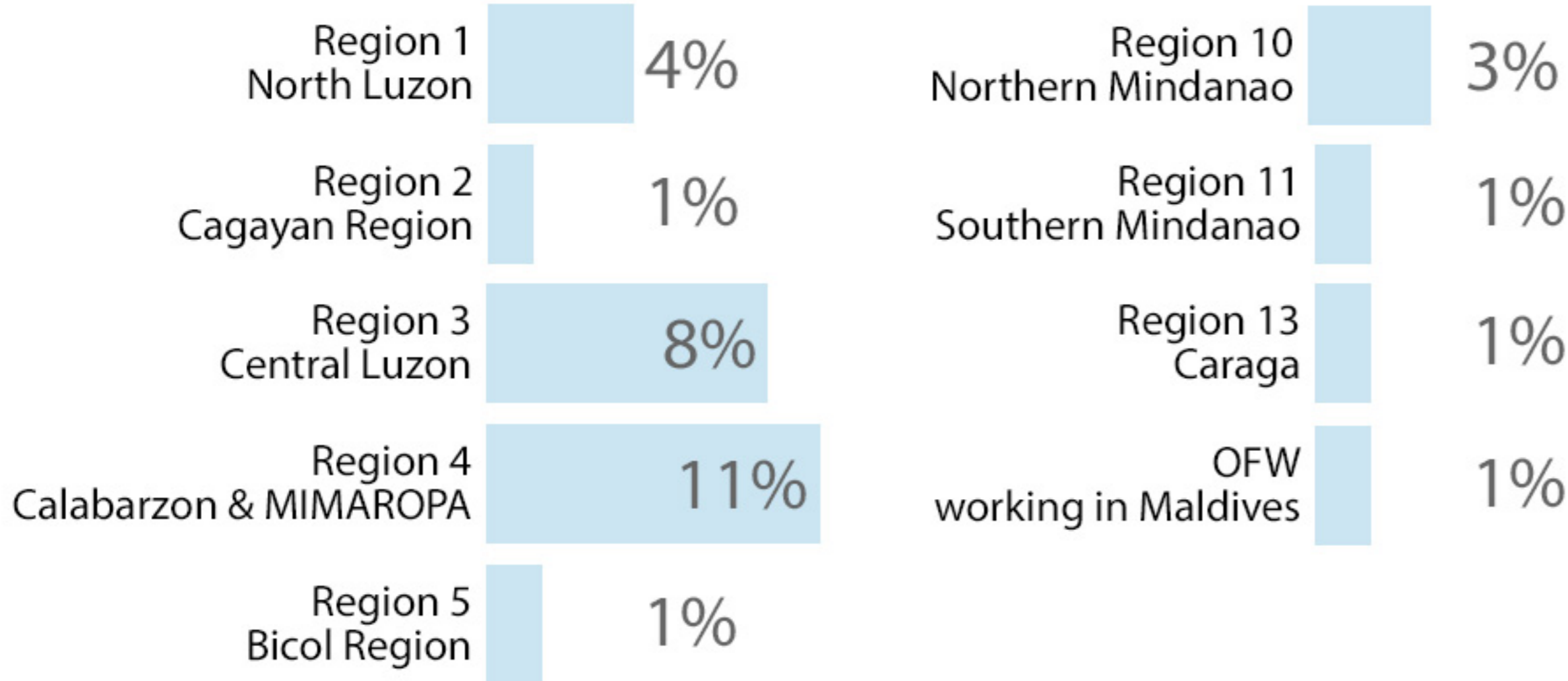
WHICH REGION DO YOU NORMALLY WORK IN?

For Hospitality & Tourism Professionals 43% were working in NCR prior to the ECQ. 16% were working in Region 4 (Calabarzon & MIMAROPA) and just under 14% were working in Region 6 (Western Visayas).



WHICH REGION DO YOU NORMALLY WORK IN?  
HOSPITALITY & TOURISM PROFESSIONALS

For Owners, Directors & Managers 29% have a business in Region 6 (Western Visayas), 27% in NCR, just over 13% in Central Visayas (Region 7) and 11% in Region 4 (Calabarzon & MIMAROPA).



WHICH REGION DO YOU NORMALLY WORK IN?  
OWNERS, DIRECTORS & MANAGERS

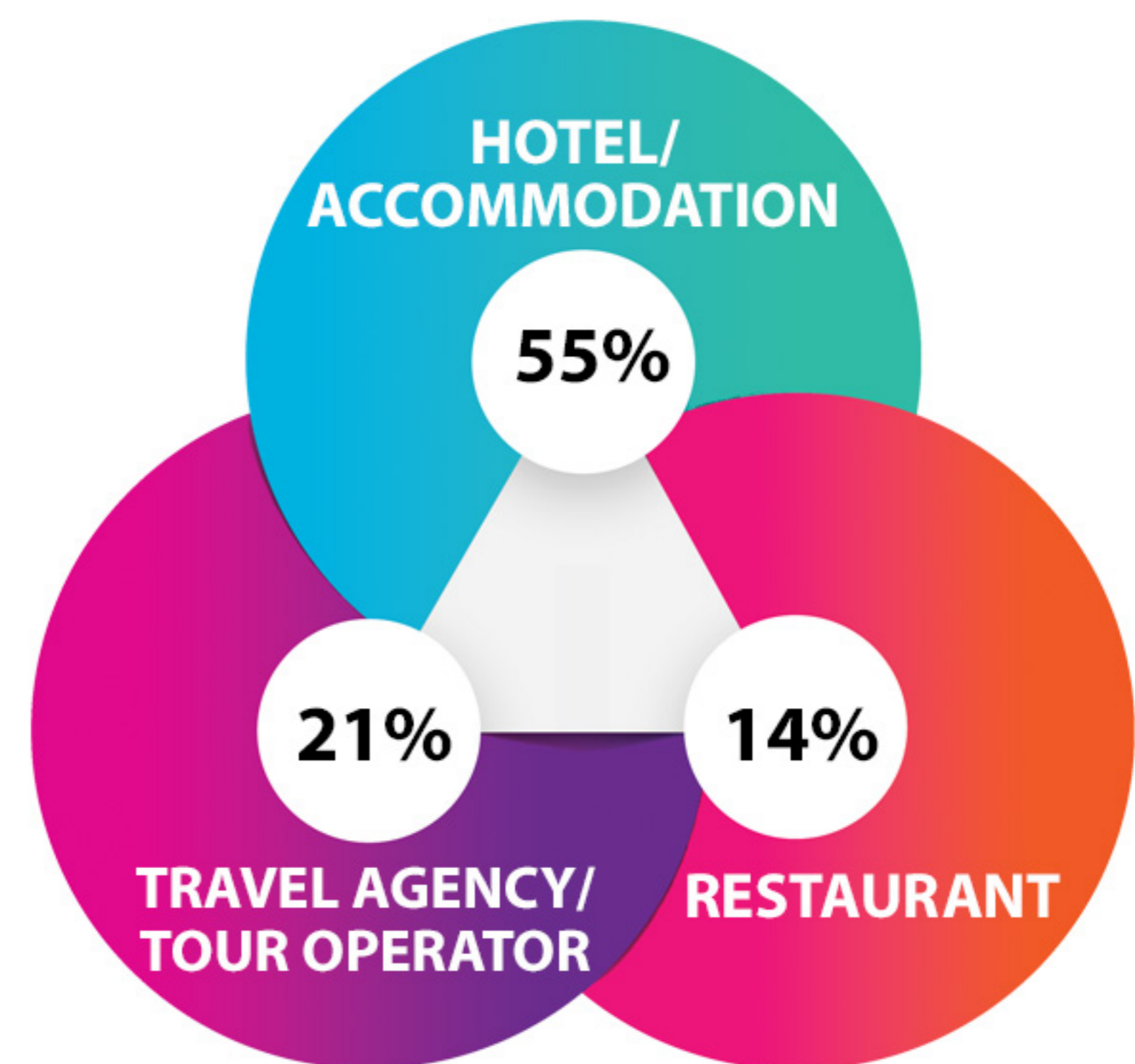
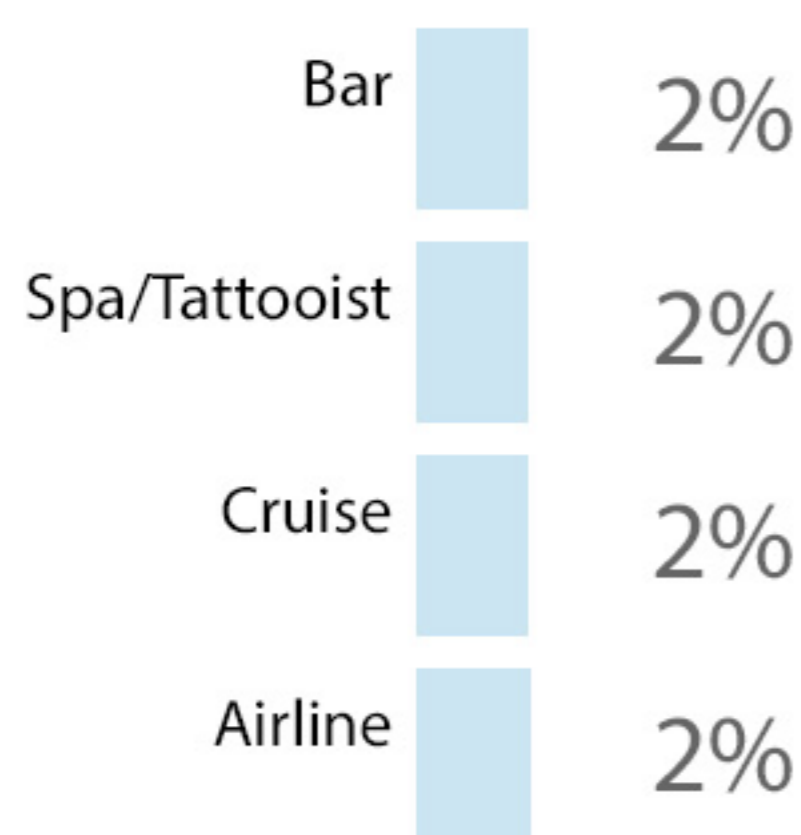
## 2. Impact of ECQ & COVID-19 On Hospitality & Tourism Professionals

### WHAT HOSPITALITY/TOURISM SECTOR DO YOU WORK IN?

55% of the Hospitality & Tourism employees who took part in our survey, were working in the Hotel/Accommodation sector.

14% of respondents were working in a Restaurant, and 21% were working for a Travel Agency or Tour Operator. The remaining respondents were working in a Bar (2%), Spa or Tattoo Studio (2%), Cruise Company (2%) or Airline (3%).

#### WHAT HOSPITALITY/TOURISM SECTOR DO YOU WORK IN?



WHICH SECTOR DO YOU WORK IN?

## 51 People Work in the Hotel or Accommodation Sector

Of the 51 people working in a Hotel, 41% work within a hotel, 11% advised they were working in a Hotel-based Bar or Restaurant, 2% were working for a Hotel-based Travel Agency and 1% was working in a Hotel-based Spa.

1 person working in a Hotel did not answer this question.

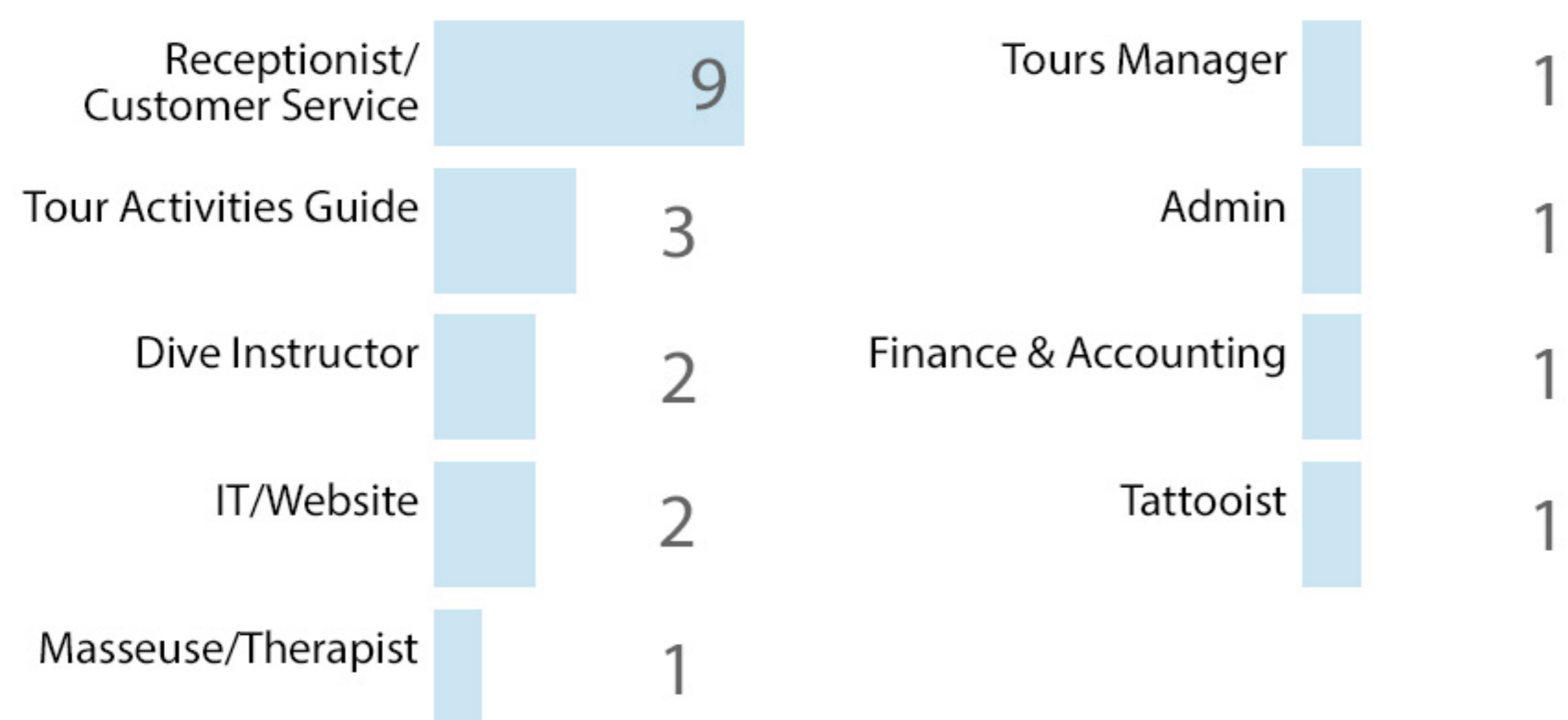


## 15 People Work in a Restaurant or Bar

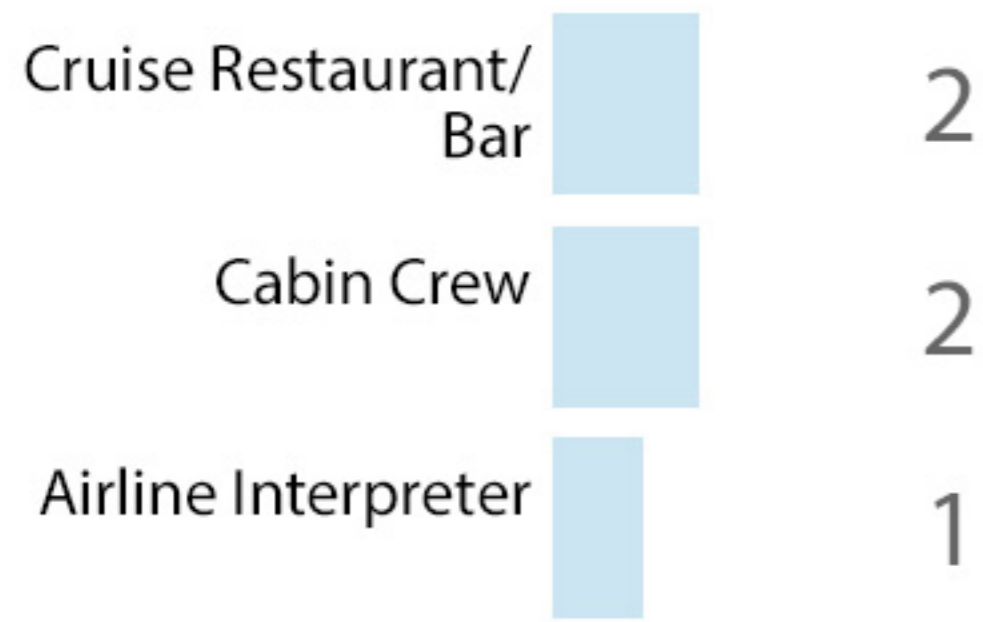


## 22 People Work for a Travel Agency, Tour Operator Or Activities Company

1 Musician employed in a bar has another parttime job, as a Guest Photographer for a Tours & Activities company in Western Visayas.



## 5 People Work For An Airline or Cruise Company.



## WHAT IS YOUR CURRENT EMPLOYMENT SITUATION?

62% of respondents stated that they have been placed on “No Work, No Pay” status. A total of 58 people out of the 93 people surveyed.

32 of these are hotel employees, 11 are Bar & Restaurant employees, 12 people were working for a Travel Agency or Tour Operator, 2 people were working for a cruise or airline. 1 person was working at a Spa.

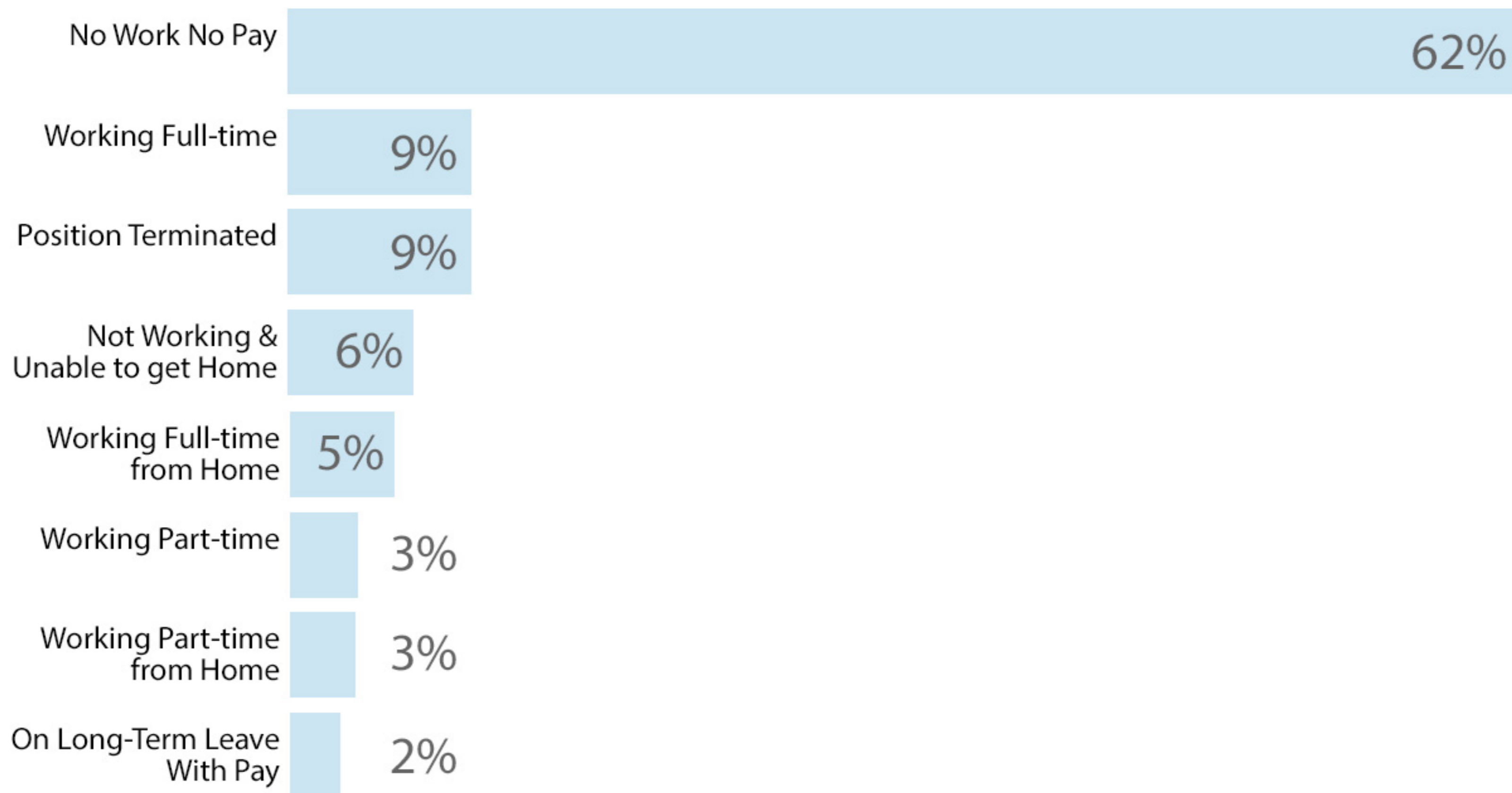
9% of those surveyed remain employed full-time and this is predominantly people working in a Hotel or Resort; 6 employees. A further 8 employees from the Hotel, Cruise and Airline sectors have been fortunate to be employed on a full or part-time basis, working from home.

9% of those surveyed have had their position terminated completely. These were employees working for a Hotel (3), Hotel Spa (1), Restaurant (2) and Travel Agency (2).

6% answered that they have no job and are Locally Stranded Individuals (LSI); employees stranded in the region where they work and unable to get home. This includes 4 people working for a Hotel, 1 person working for a Restaurant and 1 Person working for a Travel Agency.

Only 1 person working as Cabin Crew for an Airline remains working on a part-time basis, for Repatriation Flights. The Airline Interpreter advises they are employed part-time at home.

### What Is Your Current Work Situation?



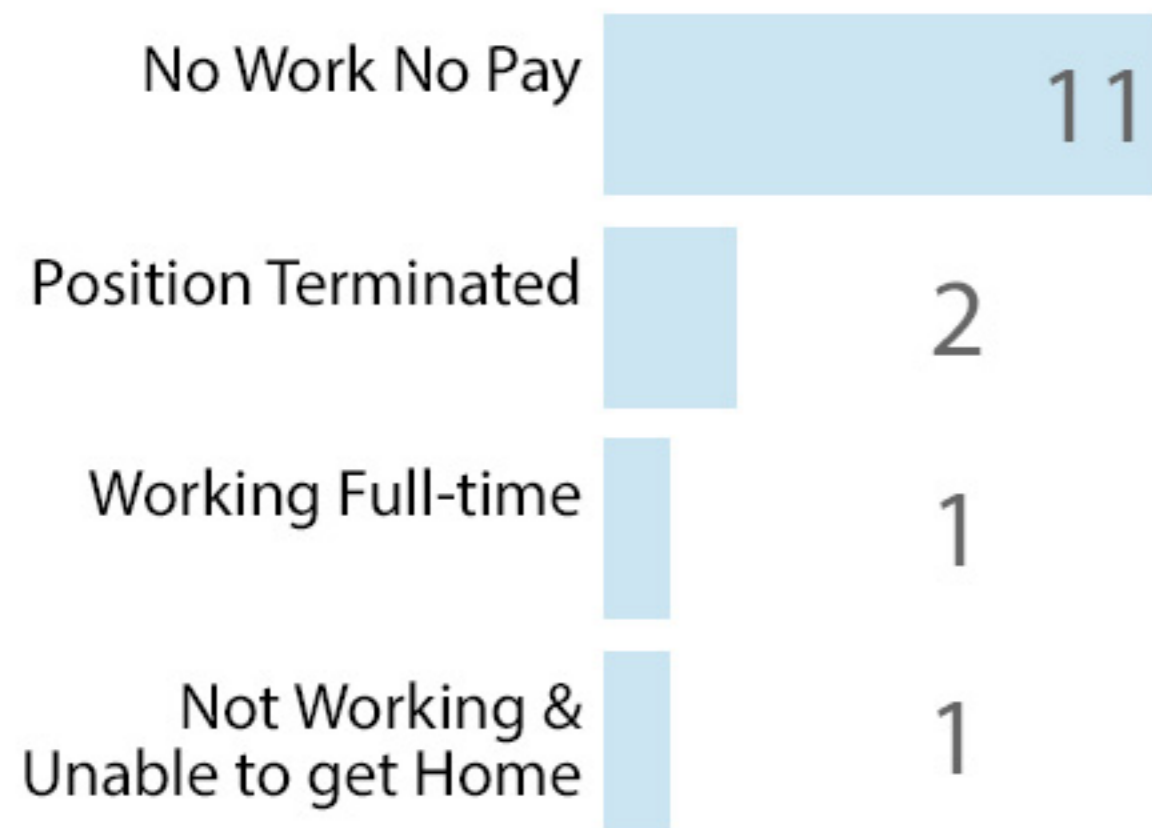
### What Is Your Current Work Situation – Hotel Staff





Two people remain employed Full-Time at their place of work for a Restaurant and a Tour Operator, in an Accounts and Admin role respectively. 1 person has been able to continue to work part-time, undertaking tattoos for locals and stranded foreign tourists at their place of work.

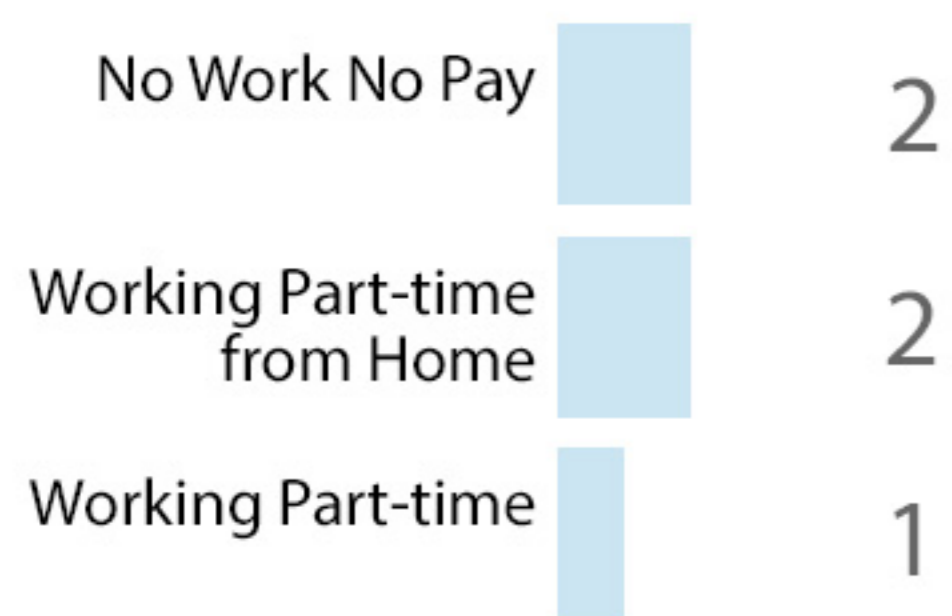
### What Is Your Current Work Situation – Restaurant/Bar Staff



### What Is Your Current Work Situation – Travel Agency, Tour Operator Or Activities Company



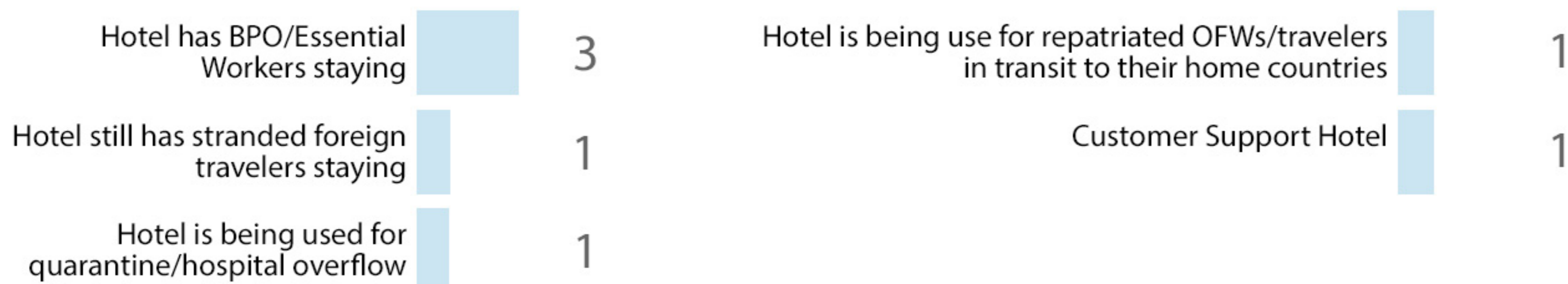
### What Is Your Current Work Situation – Cruise/Airline



Of those still working full or part-time for a Hotel during ECQ,

- 1 person is at a hotel which had foreign tourists booked in prior to March 17.
- 3 people are working at a hotel which has BPO or Essential Workers staying.
- 1 Person is working in a hotel being used for quarantine.
- 1 person is working in a hotel which is hosting Overseas Foreign Workers (OFW's) and repatriating Foreign Nationals.
- 1 person remains in hotel employment to deal with Customer Services.

### Hotel Employees Still Working during lock-down



Two people remain employed Full-Time at their place of work for a Restaurant and a Tour Operator, in an Accounts and Admin role respectively.

1 person has been able to continue to work part-time, undertaking tattoos for locals and stranded foreign tourists.

4 people working for a Travel Agency are working Full-Time from home. They did not specify their duties for home working

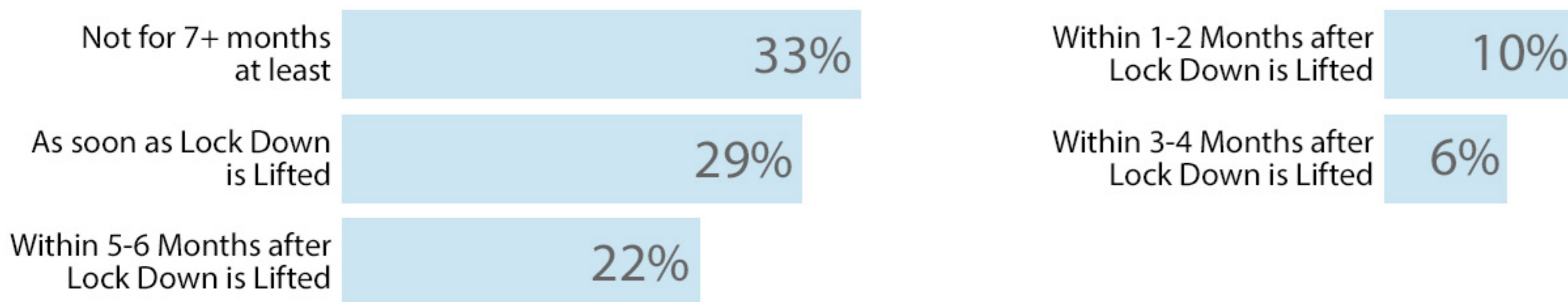
## THOUGHTS ON RETURNING TO WORK

A lack of confidence in the industry bouncing back from the COVID Pandemic, and a lack of communications from Employers can result in employees looking for work elsewhere or leaving the industry entirely.

Certainly one of the concerns of 37% of the Hospitality & Tourism Business Owners surveyed is that some of their employees won't return to work (What Are Your Main Concerns page 34 ).

We asked the 72 responders who are either Working From Home, on leave or on No Work No Pay, when they expect to be asked back to work.

### When do you think you will be asked to go back to work?



29% of people felt confident that tourism would be quick to restart and they'd be called back to work as soon as Lock Down was lifted. Almost 55% felt that it would be 5 months or longer before they were called back to work.

16% felt it would be between 1-4 months.

There was no particular industry sector where employees showed greater optimism for a quicker recovery and call back to work. The sentiments were evenly split, by industry sector, for a very quick or very slow recovery period.

## DO YOU THINK YOU WILL STILL HAVE A JOB TO GO BACK TO?

We asked the 78 responders who are either Working From Home, on leave, on No Work No Pay, or who are currently Without Work and Stranded, how confident they felt that they would still have a job to go back to.

21% were confident or really confident that they would have a job to return to. Worryingly, Nearly 34% said that they were not confident they would still have a job to return to. And nearly 45% were unsure if they would still have a job to return to.

For those who were working in a Hotel, almost 73% were unsure or not confident about having a job to return to. That ran to 83% among those working in a Restaurant or Bar. And 89% among those working in a Travel Agency, for a Tour Operator or Activities.

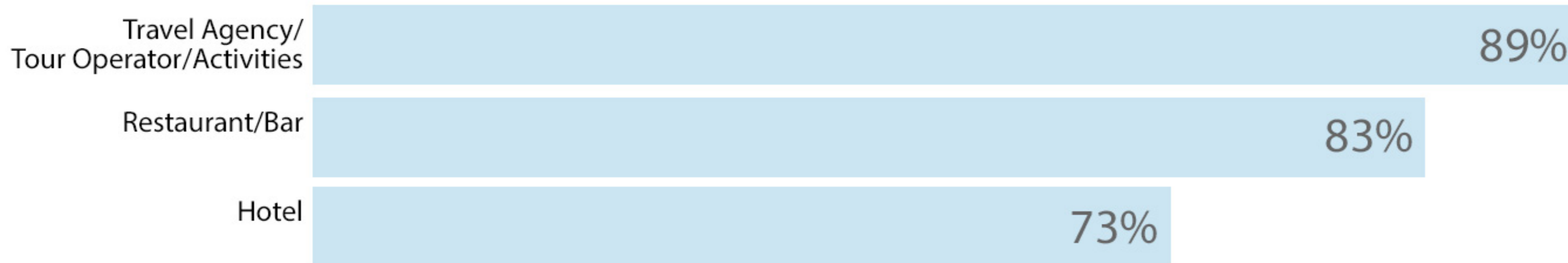
This level of concern may be realistic when 62% of the Business Owners and Senior Managers surveyed said they were considering dissolving the business (21%), and/or selling the business (41%). (What Actions Are You Considering To Manage Your Business During Closure page 28)

In addition, 49% of Owners and Managers said they would be reducing the number of Full-Time Employees, and 17% said they would be reducing the number of Part-Time Employees, in order to reduce their Overheads once they begin to re-open (Survival Mode page 30).



HOW CONFIDENT ARE YOU THAT YOU WILL HAVE A JOB TO RETURN TO

## CONFIDENCE BY INDUSTRY SECTOR

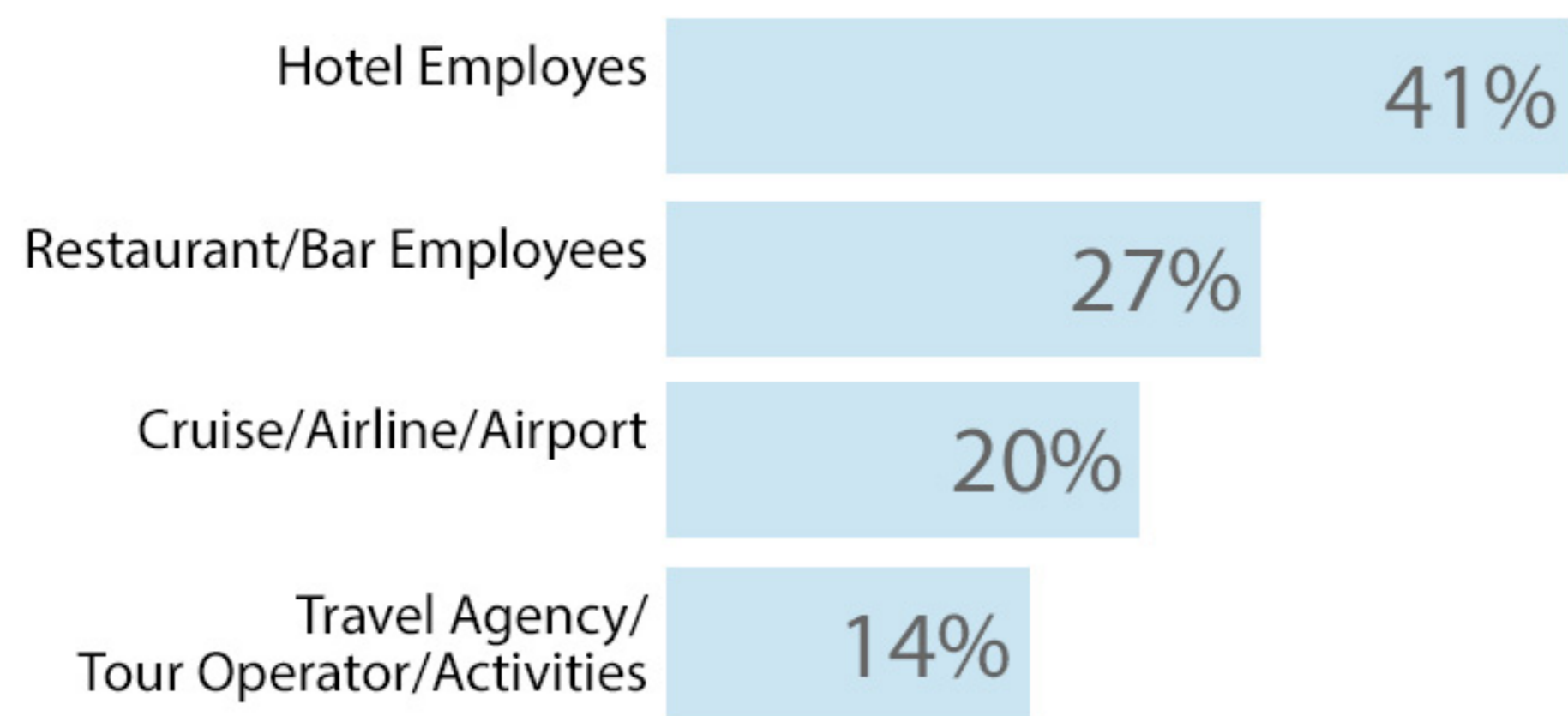


## ARE EMPLOYEES RETHINKING THEIR CAREERS?

When asked if they planned to return to their workplace, 32% of all respondents said they either won't return to their job or are not sure if they will return.

Two people working in a Hotel Restaurant, and One person working in a Hotel Travel Agency, have already secured work online that they are enjoying. One person previously working in a hotel, has started their own online business. Four people working in a Hotel, Hotel Restaurant or Hotel Travel Agency will be looking for a job closer to their home town. Eight people want to work abroad. Two people want to stay at home with their family. One person wants to go back to college. Two people no longer want to work in hospitality.

### EMPLOYEES WHO ARE UNSURE OR WON'T RETURN TO THEIR JOBS?



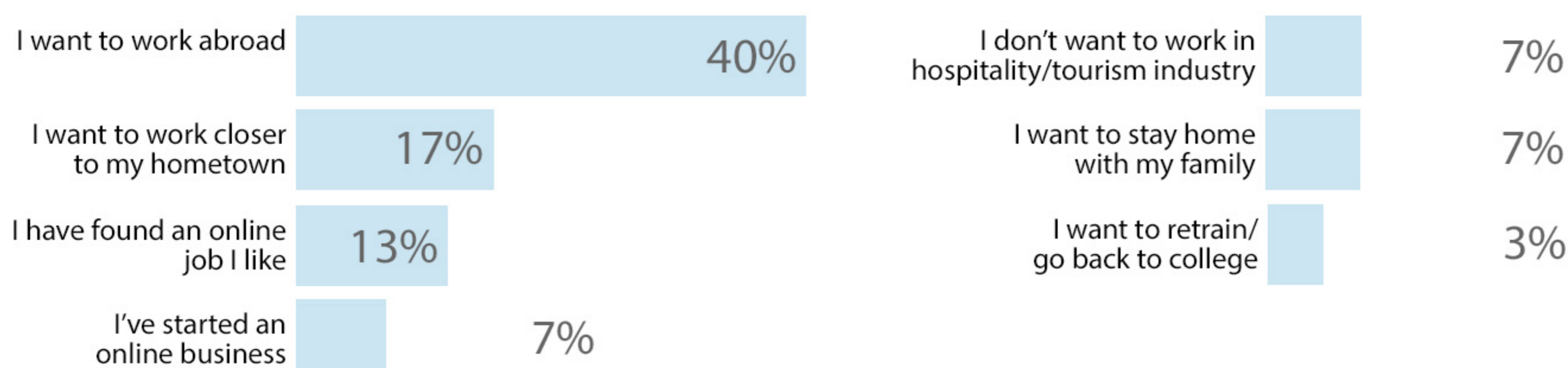
### TRAVEL AGENCY/TOUR OPERATOR/ACTIVITIES EMPLOYEES RETHINKING THEIR CAREER

Only 3 people are rethinking their future. One Person has secured an Online Job, One person wants to work closer to home, and one person wants to work abroad.

### RESTAURANT/BAR EMPLOYEES RETHINKING THEIR CAREER

One person has started their own Online Business and two people want to work abroad. One person will remain in the restaurant industry but is looking for a new chef position. One person advises they are leaving their job due to "Poor Management". Another is thinking to leave their current job because "The company is not giving us clear instruction about what they will do to us."

### IF YOU HAVEN'T DECIDED, OR DON'T PLAN TO GO BACK TO THE SAME JOB, WHY?



## COMMUNICATION FROM EMPLOYERS

One way to encourage confidence in employees would be to give regular updates and communications. This can be achieved with direct emails or texts. If a business has no real news to offer its employees there is still a need to keep a feeling of “team togetherness”. Businesses could consider holding regular online Team Meetings, or encourage Managers and Supervisors to either hold online team meetings or ‘touch base’ with their team members.

Communications may be about the destination where their place of work is located, such as predicted re-opening dates, what the LGU is doing to prepare to re-open or to protect the area from further outbreaks. Or it may be about advising employees when the business is submitting papers for accreditation to re-open.

However, realistically for many areas still affected by active COVID-cases, business owners are as much in the dark as their employees.

43% people said that they were unhappy or really unhappy with how their employers were updating them about their jobs. Such sentiments can result in employees looking for opportunities elsewhere, or leaving the industry entirely.

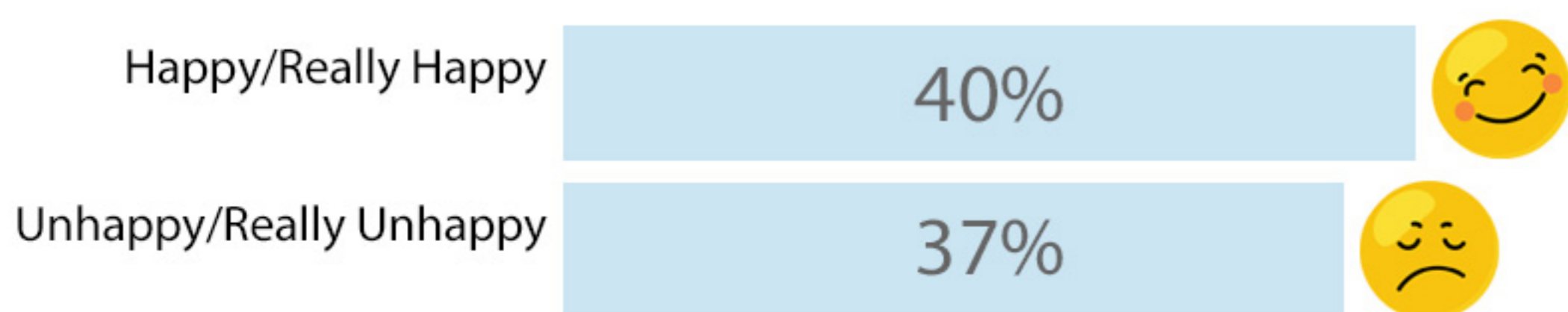
However, 31% were very happy or happy with the communication from their employers.

Only 1 person working for the Airlines was happy with communications, the other two respondents, and 2 Cruise workers were either Unhappy or Really Unhappy.

Despite being unhappy with the level of communication from their employers only one of those working for a Cruise Company is unsure about returning to their job, and is considering looking for work abroad.

### HOW HAPPY ARE YOU WITH THE COMMUNICATIONS FROM YOUR EMPLOYER?

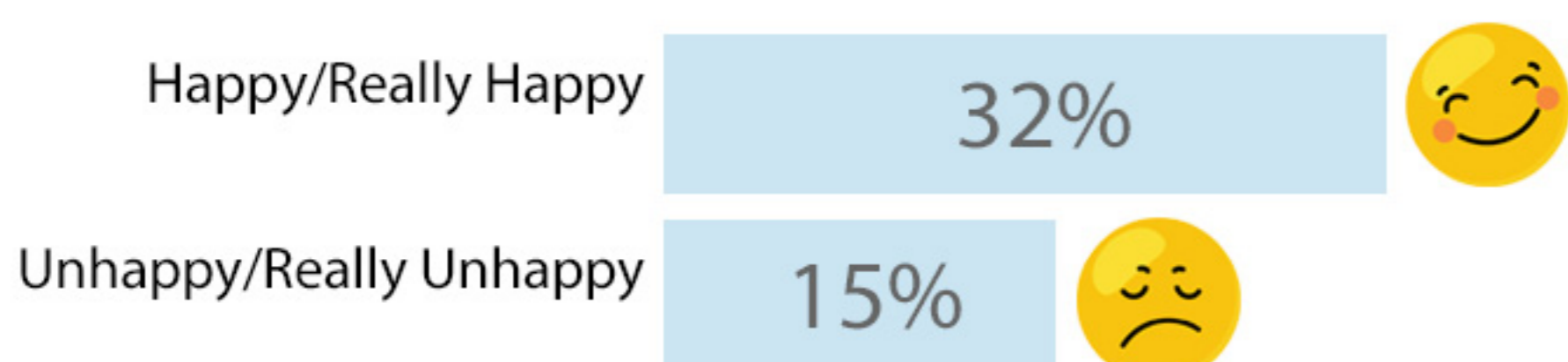
#### HOTELS



#### RESTAURANT/BAR



#### TRAVEL AGENCY/TOUR OPERATOR/ACTIVITIES



## REFRESHER TRAINING

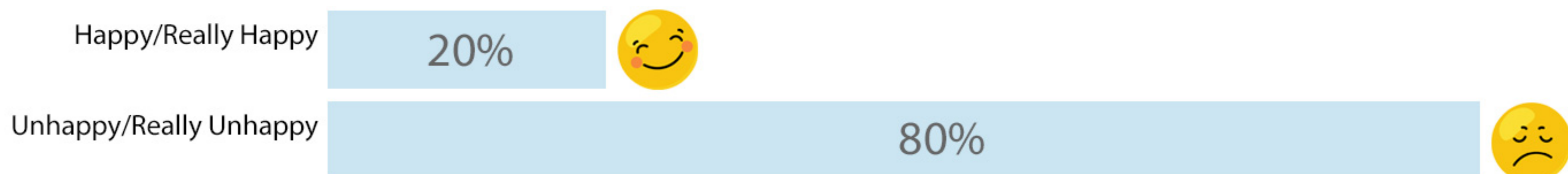
Another way to boost confidence among employees, particularly confidence that they will still have a job to return to is to offer interim refresher training.

For those where the employees live locally, and quarantine levels have been relaxed, this will be simpler than those in areas where travel is still restricted or they're still under higher level quarantine.

However, Refresher Training could be provided via podcasts, Zoom, training videos uploaded to YouTube and Quizzes aimed at refreshing knowledge, skills and best practices.

At the time of the survey only 20% of the respondents had received any refresher training, and only 26% of Owners and Managers have said they will be offering staff training in order to better position themselves for the Tourism Bounce Back (Positioning For Recovery page 31).

### HAVE YOU RECEIVED ANY REFRESHER TRAINING DURING ECQ?



## FINANCIAL SUPPORT DURING COVID-19

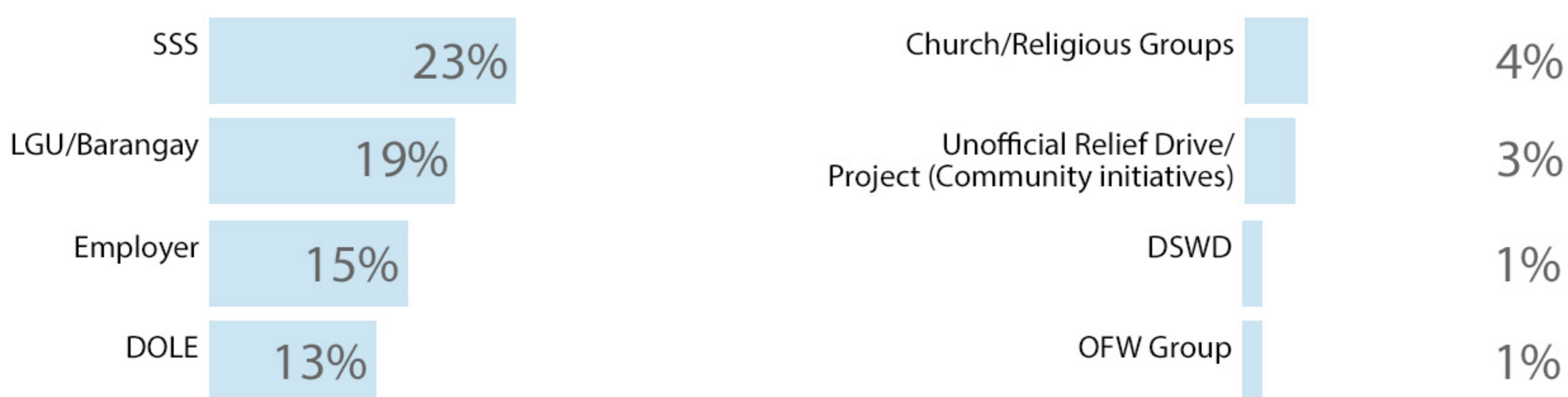
20% of employees taking the survey have said that they have received no financial assistance or support at all, since the start of ECQ and the loss of their job.

Those working for a Travel Agency, Tour Operator or in the Activities Sector (Spa) were more likely to have received DOLE (AMP) money than any of the other sectors.

The highest numbers of employees reporting no financial support at all are those working for a Restaurant or Bar and those working in the Cruise or Airline/Airport Industry.

The survey results show that those who did receive financial support were more likely to have received it through SSS at 23%, or their LGU at 19%, than through DOLE at 13%.

### HAVE YOU RECEIVED ANY FINANCIAL ASSISTANCE OR OTHER SUPPORT?



Of those working in a Hotel, only 5 had received a DOLE payment at the time of the survey (June), 14 had received a SSS payment, 9 had received money from their LGU/Barangay, and 7 people received money from their employer. 4 people had received no financial support or assistance.

Of those working in a Restaurant or Bar, 2 people received money from DOLE, 2 from SSS, 1 from their LGU and 1 from their employer. 3 had received support from unofficial Relief Drives or Church groups. 5 people had received no support.

5 people working for a Travel Agency had received money from DOLE, 5 people working for a Travel Agency or Tour Operator received money from SSS. 1 Travel Agent received support from DSWD. 6 people working for a Travel Agency, Tour Operator or Activities received support from their LGU, and 6 from their employer. 2 had received support from unofficial Relief Drives or Church groups. 4 people had received no support.

4 people working for Cruise Companies or Airlines have received no support. 1 person working for an Airline had received support from their employer.

47% of Owners and Senior Managers reported that they had applied to the DOLE (AMP) but had been declined or told that there was no more budget available.

## COVID-19 WORRIES

85% of employees surveyed said they were either worried or very worried about the COVID pandemic and its impacts on them and the industry.

1% were not worried, 9% were slightly worried and 5% said they were trying not to think about it.

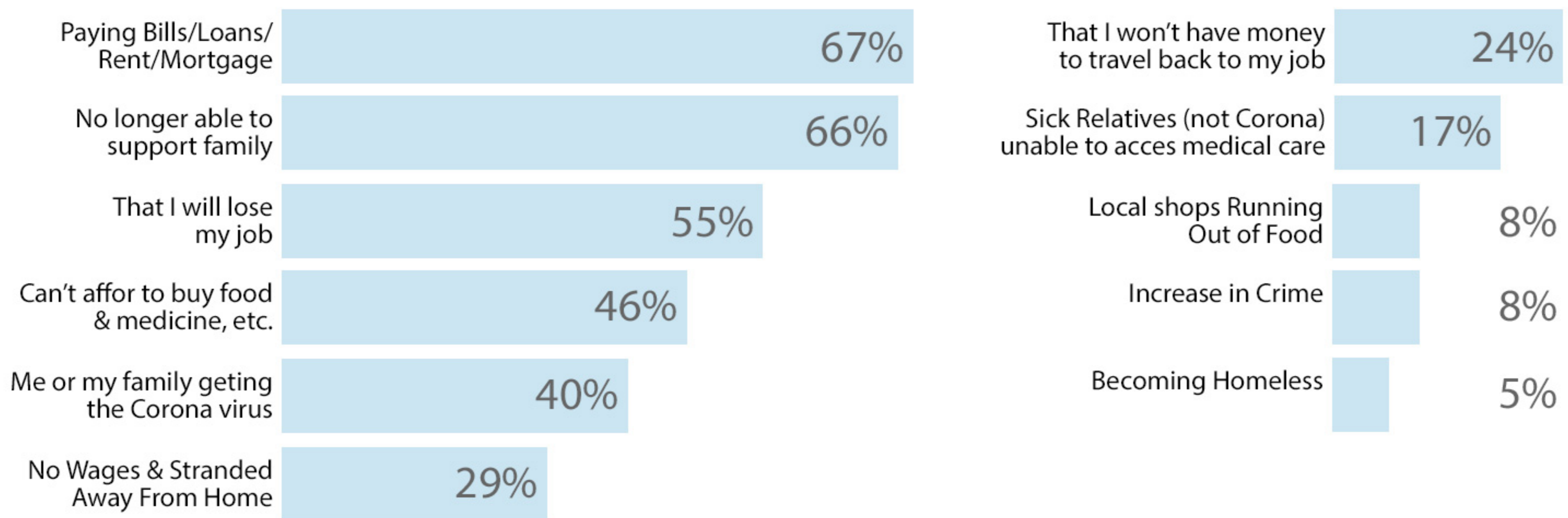
9 people declined to answer.

We asked those who said they were worried or did not want to think about it, what their concerns were. Many had more than one concern. 4 people declined to answer.



HOW WORRIED ARE YOU ABOUT COVID-19?

### WHAT ARE YOU WORRIED ABOUT?

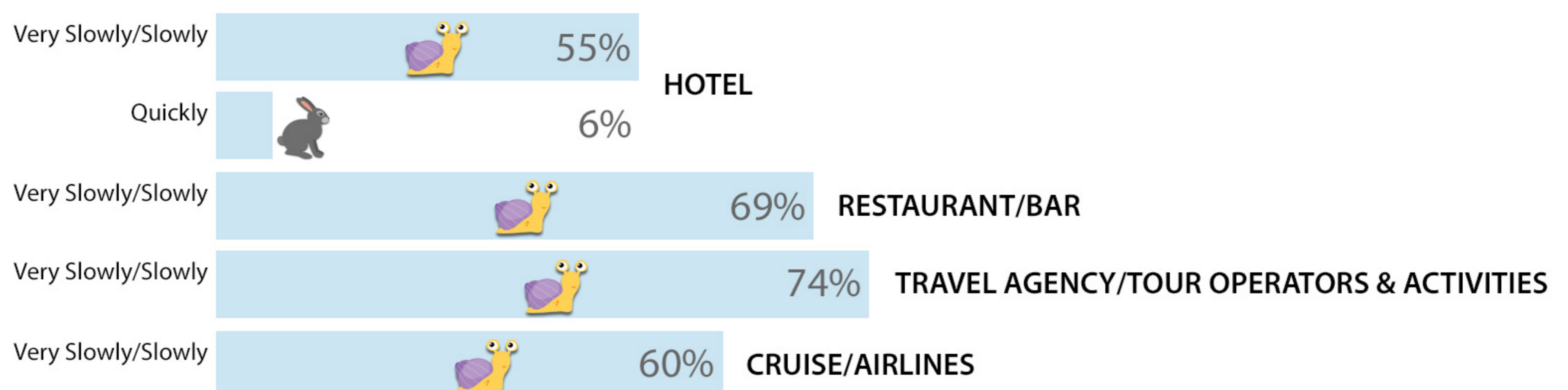


## INDUSTRY BOUNCE BACK CONFIDENCE LEVEL

Whilst 39% of employees surveyed felt they would be called back to their jobs immediately or within 2 months of ECQ being lifted, only 3% felt that the Philippine Hospitality & Tourism Industry would Bounce Back quickly.

59% felt that the Industry would recover slowly or very slowly. 27% said they didn't know how quickly or slowly the industry would recover. 10% declined to answer.

### HOW QUICKLY DO YOU THINK PHILIPPINE TOURISM WILL BOUNCE BACK?



## OBSERVATIONS

Of the 93 employees who took this survey 80% are not working or earning (74 people). It can't be absolutely stated that this indicative of the 5.7 million people working in the Philippine Hospitality & Tourism Industry. But it probably does offer a reasonable reflection of the impact COVID-19 and ECQ has had on the people at the heart of an industry which contributed P3 trillion to the country's economy in 2019.

One-third of those who took part in this survey have stated that they have either already found work, or created businesses, away from the Industry, or that they are not sure if they will return to their jobs. If this sentiment is reflected across the whole Hospitality & Tourism Industry it will have a detrimental impact on recovery and the industry's ability to Bounce Back.

Staff shortages are one thing but losing employees can have a range of knock-on effects including:

- Loss of key skills and experience, from an industry that relies on providing a quality service.
- Costs associated with recruiting, or up-skilling and training less qualified or less experienced staff.
- Other employees leaving; especially if the departing employee has regular contact with team mates. Their departure, and their excitement for a new career or job, can act as an inspiration to others to follow suit.
- Productivity Loss, which impacts on the remaining team mates left to pick up duties and responsibilities, creating frustration and malcontent, whilst a replacement is being sought.

Of those who said they were unsure if they would return to their job, 40% said that they want to work abroad. This is something which could warrant further investigation by the Industry. Is it purely that people are looking for a new, exciting life overseas? Do people in the Hospitality and Tourism Industry perceive working overseas as more lucrative, stable or having better prospects than here in the Philippines?

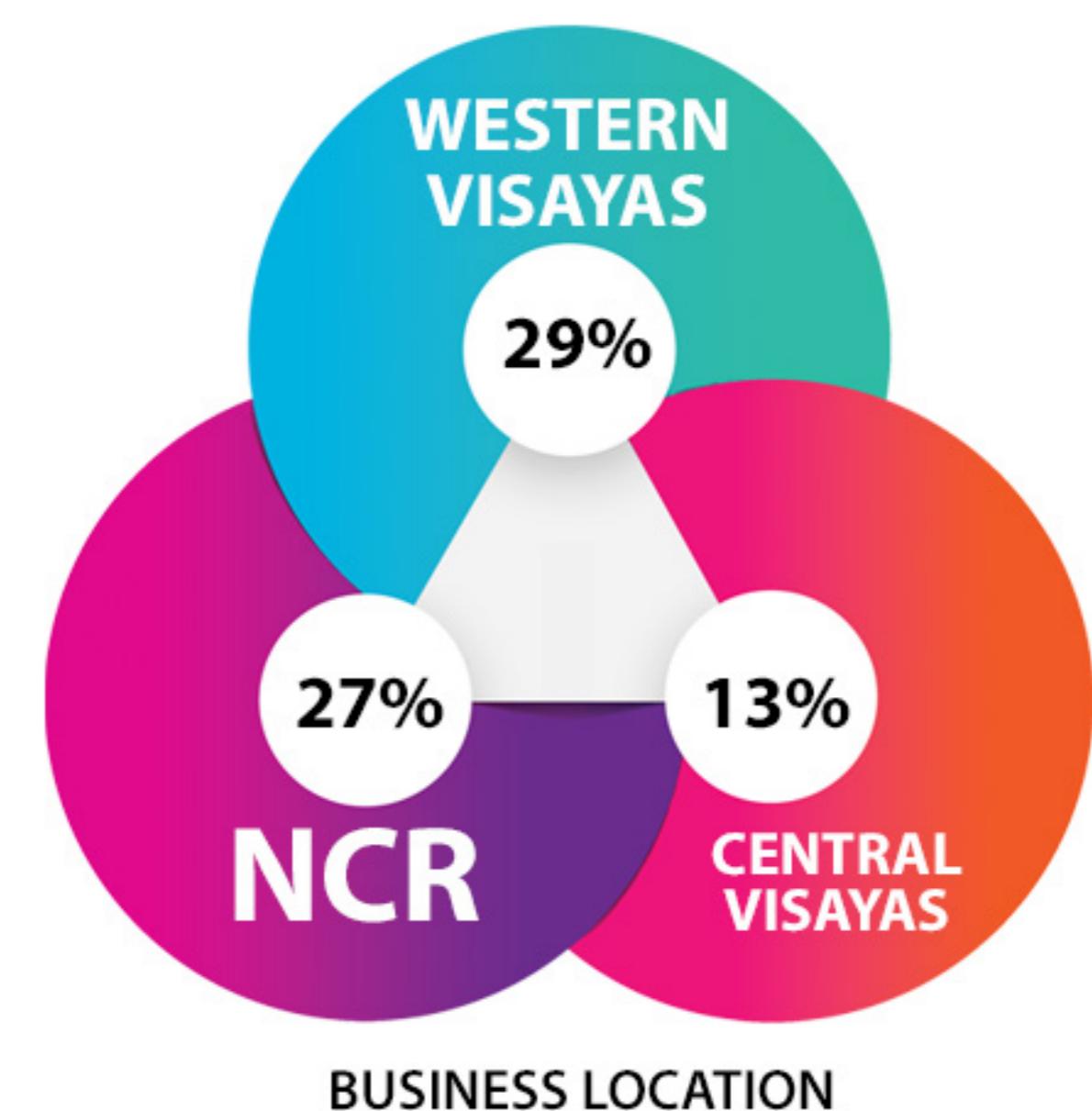
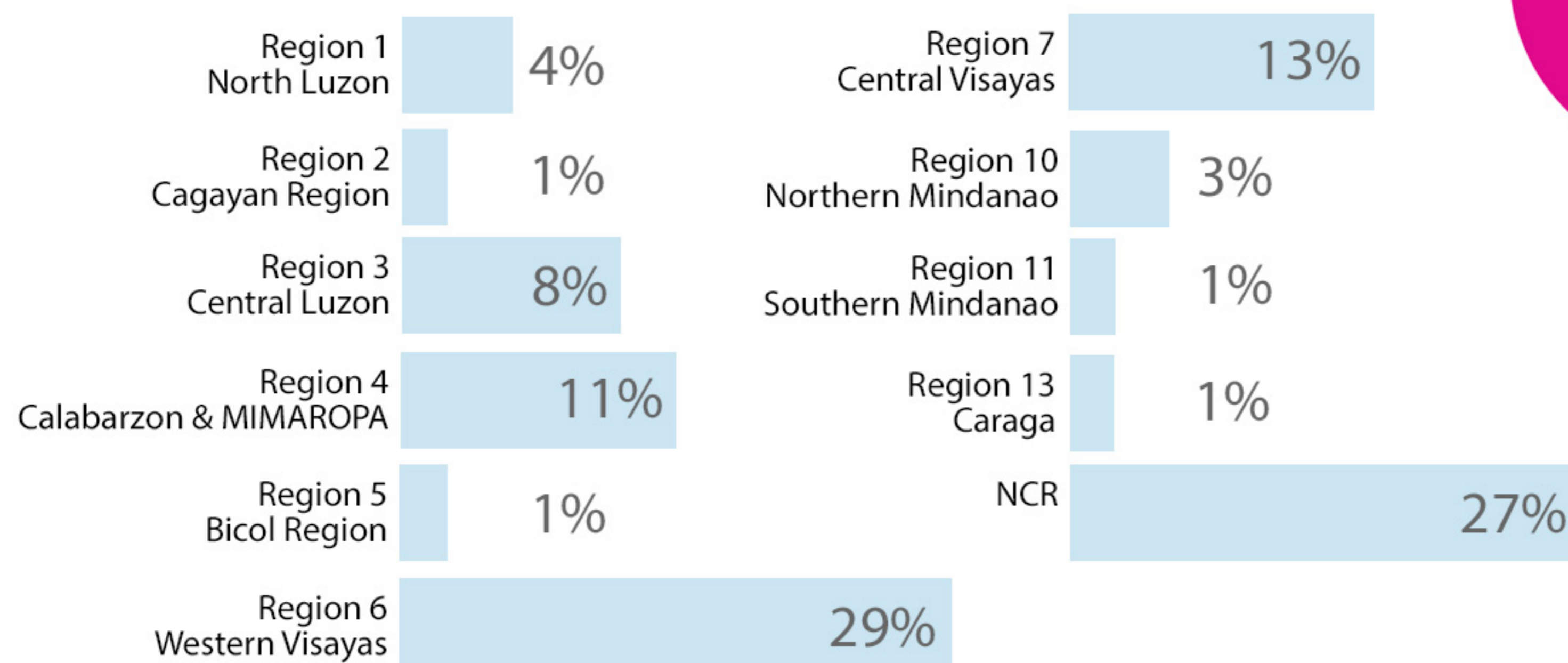
What is clear is that employees are both uncertain about the future of the Hospitality and Tourism Industry in the Philippines, or if they wish to stay part of the industry. For a country which sees a growing Tourism bringing P3 Trillion to the economy, an industry which is currently struggling to stay alive, further loss of qualified and experienced employees needs to be minimized.

## 3. Impact on Business Owners, Directors & Senior Management

### BUSINESS LOCATION

Owners and Senior Managers taking part in the survey were predominantly from Western Visayas (23), NCR (21), Central Visayas (10) and Calabarzon & MIMAROPA (9). See Appendix 1.

#### WHERE IS YOUR BUSINESS LOCATED?



1 person taking part, is a Filipino managing a Hotel in the Maldives with over 100 staff.

3 people from **North Luzon** (Region 1) took part in the survey; one owner of a Hotel, one Senior Manager of a Bar and one owner of an Online Travel Agency (OTA).

1 Hotel Senior Manager from **Cagayan** (Region 2) took part in the survey.

5 Hotel Senior Managers and 1 Restaurant Owner took part in the survey, from **Central Luzon** (Region 3).

**Calabarzon and MIMAROPA** (Region 4) featured 2 Hotel Owners and 3 Senior Hotel Managers, 1 Director of a Traditional Travel Agency and 1 Owner of an Online Travel Agency. As well as 1 Dive Shop Senior Manager, and 1 Owner of a Tour Operator Business.

1 Senior Hotel Manager from **Bicol** (Region 5) took part in the survey.

**Western Visayas** (Region 6), saw 5 Hotel Owners, 7 Senior Hotel Managers and 1 Director of a Hotel take part in the survey. 1 Owner of a Long-stay Accommodation and 1 Owner of a Hotel Restaurant & Bar also contributed. One Owner of a Restaurant and 1 Senior Restaurant Manager, as well as 2 Bar Owners and 1 Senior Bar Manager completed the survey. Finally, 1 Spa Owner and 1 Shop Manager from Western Visayas took the survey.

There were 4 Hotel Owners, 4 Senior Hotel Managers and 1 Director of a Hotel from **Central Visayas** (Region 7) and 1 Dive Shop Senior Manager.

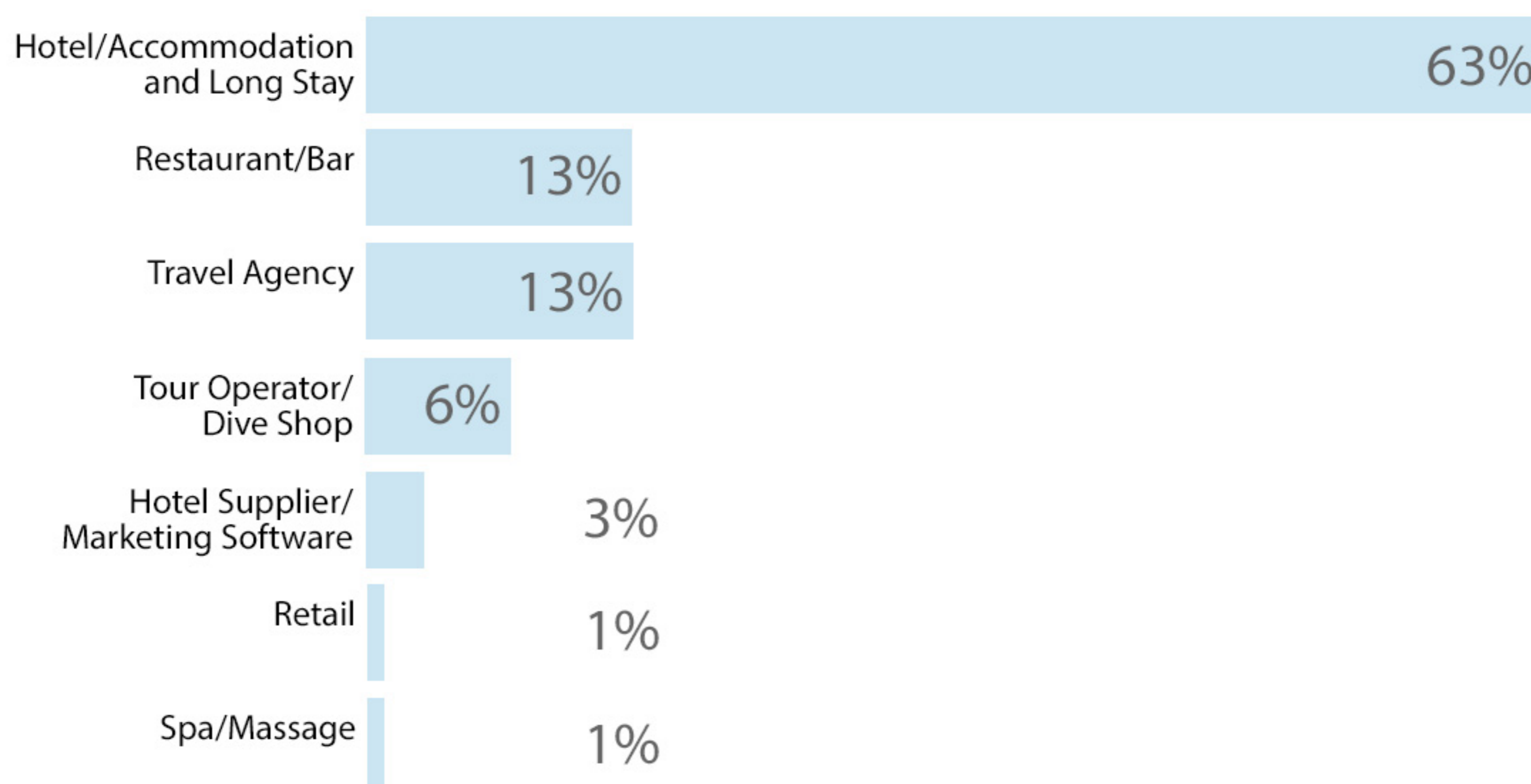
1 Senior Manager and 1 Hotel Owner from **Northern Mindanao** (Region 10) took part. 1 Owner of a Traditional Travel Agency from **South Mindanao** (Region 11). And 1 Hotel Owner from **Caraga** (Region 13).

Those taking part from NCR included 8 Hotel Senior Managers or Directors, 1 Restaurant Owner and 2 Restaurant Senior Managers, 1 Director and 1 Owner of an Online Travel Agents, 3 Traditional Travel Agency Owners and 1 Owner of a Traditional & Online Travel Agency. Two Senior Managers of a Tour Operator from NCR, also took part, as well as 1 Owner of a Hotel Supplier and 1 Digital Marketing business Owner.

## BREAKDOWN BY SECTOR

34% of Hotel Owners/Managers taking part in the survey have a business in Region 6 (Western Visayas). It is not altogether surprising that so many opted to take part in the survey; Region 6 is home to Boracay, an island that has previously experienced the economic impact of a 6 month tourism closure in 2018. Therefore, arguably, experiencing a second tourism closure impact is something that few can afford. The same can certainly be said for their employees too.

### WHAT AREA OF TOURISM/HOSPITALITY DO YOU WORK IN?



16% of Hotel Owners/Managers have a business in NCR (National Capitol Region).

57% of Owners/Managers of traditional Travel Agencies (High Street shop front), Online Travel Agencies (OTA's) and Tour Operators have a business in NCR.

The remaining business sectors were spread out across 11 Philippine Regions and 1 Hotel Owner where the business is located in the Maldives.



## DESIGNATION

Of the 79 people surveyed 49% are Business Owners:

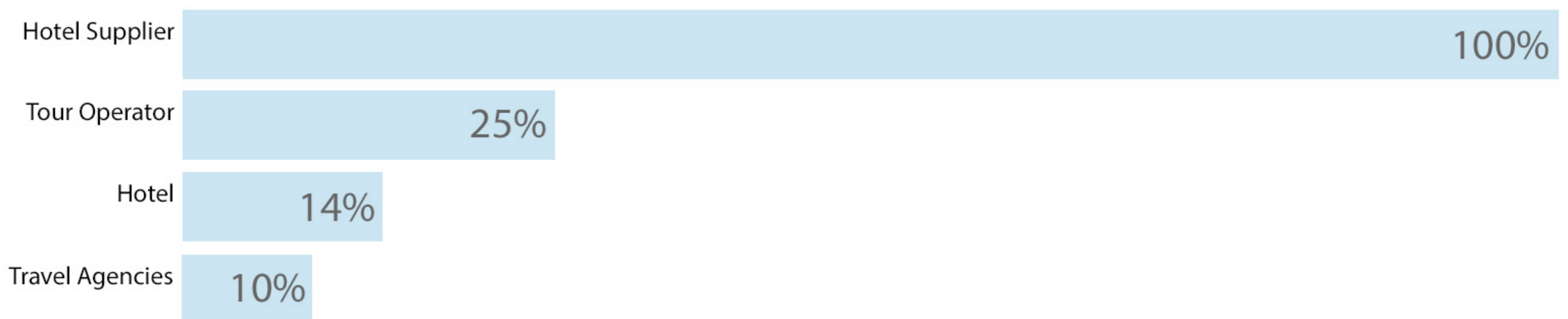


3 Hotel Directors & 1 Hotel CEO took part, as well as 1 Online Travel Agency Director & 1 Tour Operator Director. The remaining people surveyed were Senior Manager level.

## TRAVEL MARKETS CATERED TO BY THOSE TAKING PART IN THE SURVEY

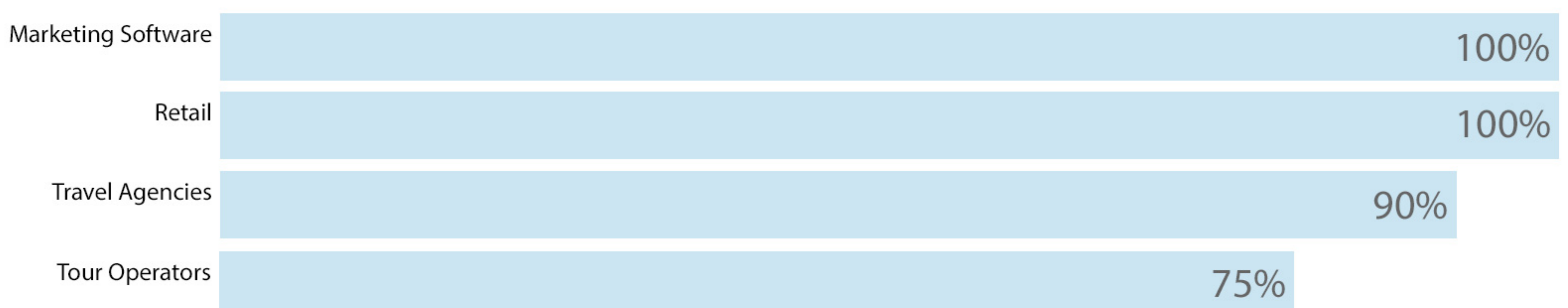
### LUXURY/HIGH END

7 Hotels, including a large hotel in the Maldives cater for the Luxury/High End Market. The Hotel Supply business market is Luxury/High End Hotels. 1 Online Travel Agency and 1 Tour Operator cater to the Luxury/High End Travel Market.



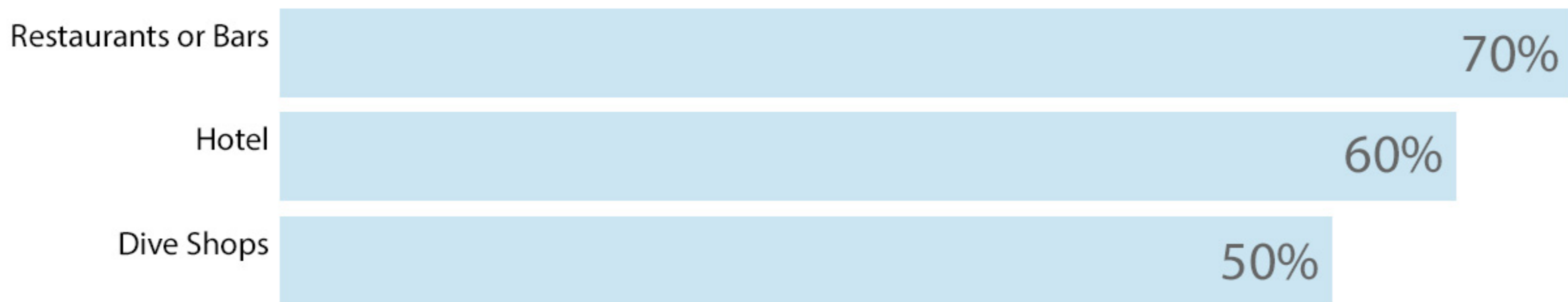
### MID-RANGE

29 Hotels and 1 Hotel Restaurant & Bar cater to the Mid-Range Travel Market. 5 Restaurants and 2 Bars are aimed at the mid-range customer. 90% of the Travel Agency businesses taking part in the survey are for the mid-range travel market; 5 Traditional (store front) Travel Agencies, 3 Online Travel Agencies and 1 Traditional & Online Travel Agency. 2 Tour Operators and 1 Dive Shop cater to mid-range Budget travellers. The 1 Retail Shop taking part in the survey is for Mid-range customers.



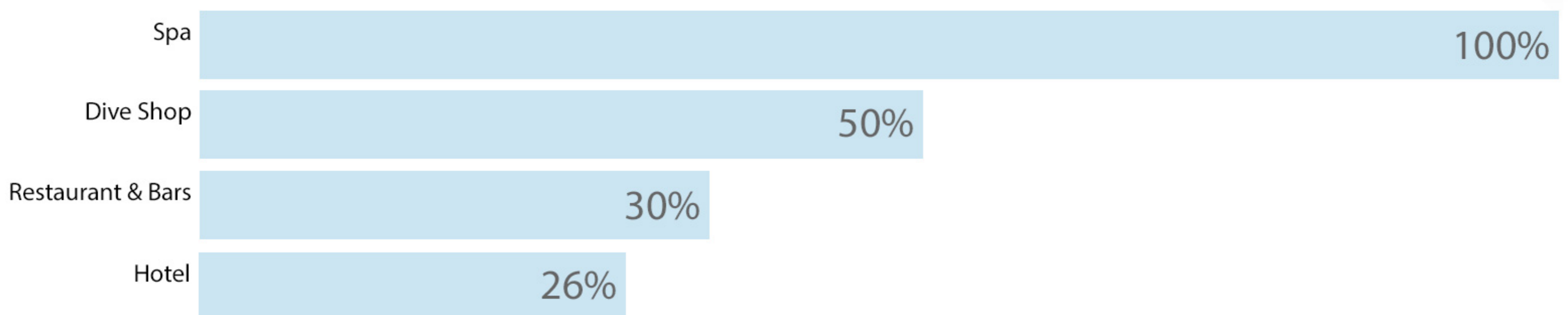
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## BUDGET

The remainder cater to the Budget Travel Market: 1 Spa, 12 Hotels, 1 Long-Stay Accommodation, 2 Bars, 1 Restaurant and 1 Dive Shop.

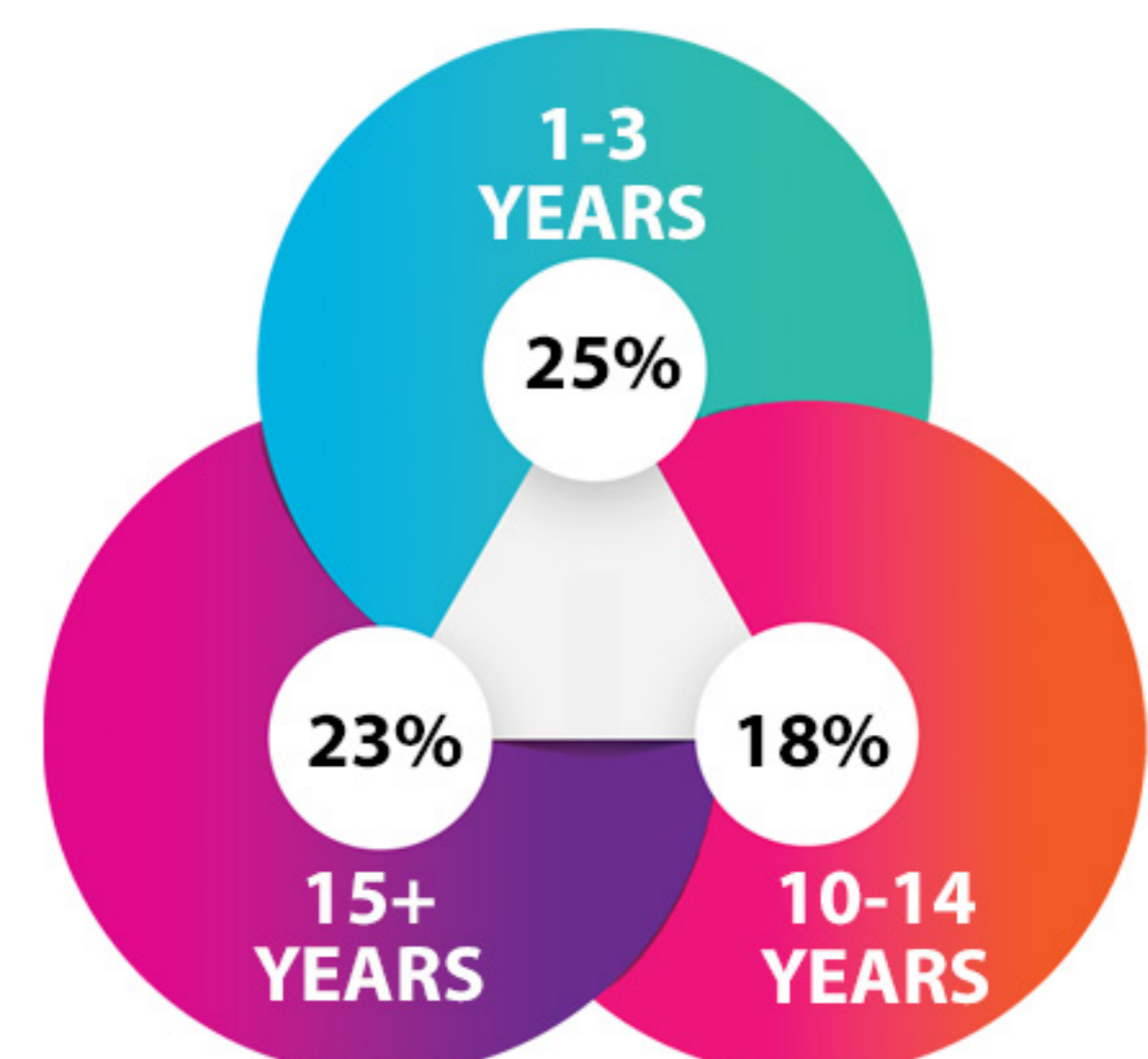
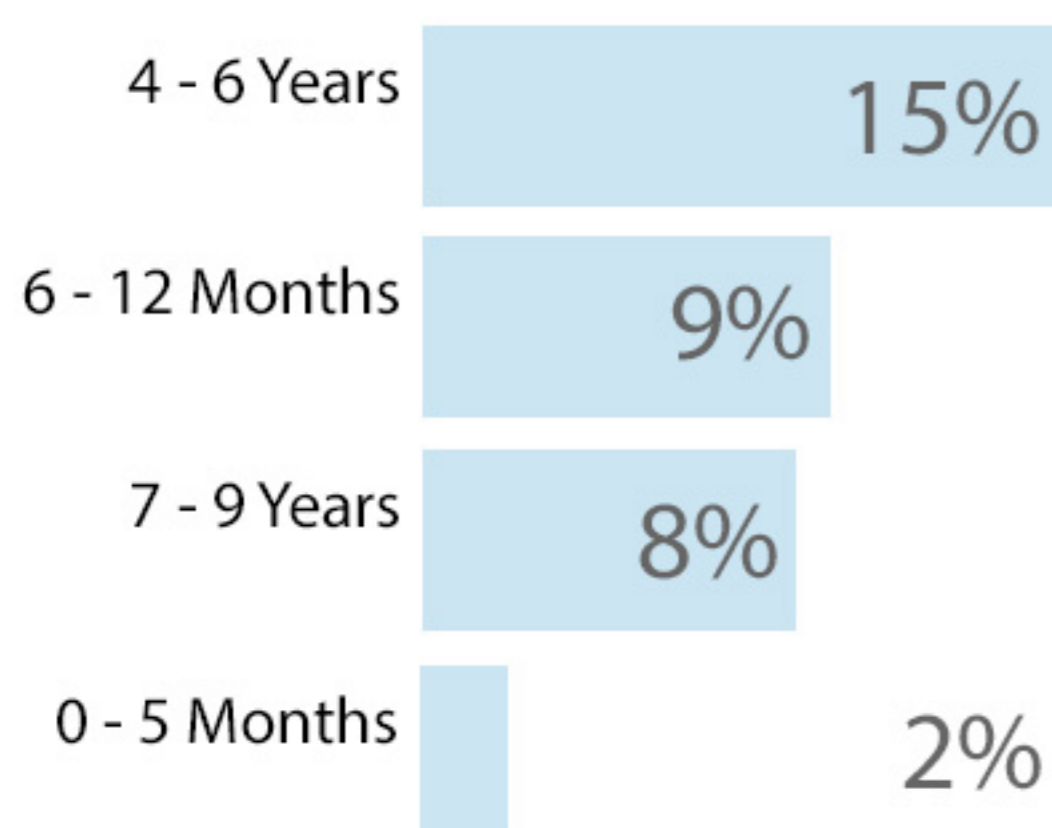


## HOW LONG HAS THE BUSINESS BEEN OPERATING?

25% surveyed said that their business had only been operating for between 1-3 years. This includes 12 hotels and 1 Long Stay Accommodation. 4 Travel Agencies and 1 Tour Operator were also among this group.

9 Businesses (11%) have only opened in the last 12 months, including 1 Region 5 and 1 Region 6 Hotel both of which opened in the last 5 months. 4 Hotels opened in the last 6-12 months; 2 in Region 7 and 1 each in Region 2 and 4. 3 Travel Agencies opened between 6-12 months ago; 1 in Region 4, 1 in Region 7 and 1 OTA in Region 4.

Many will have gone in to business due to the growing strength of the Philippine Hospitality & Tourism Industries.



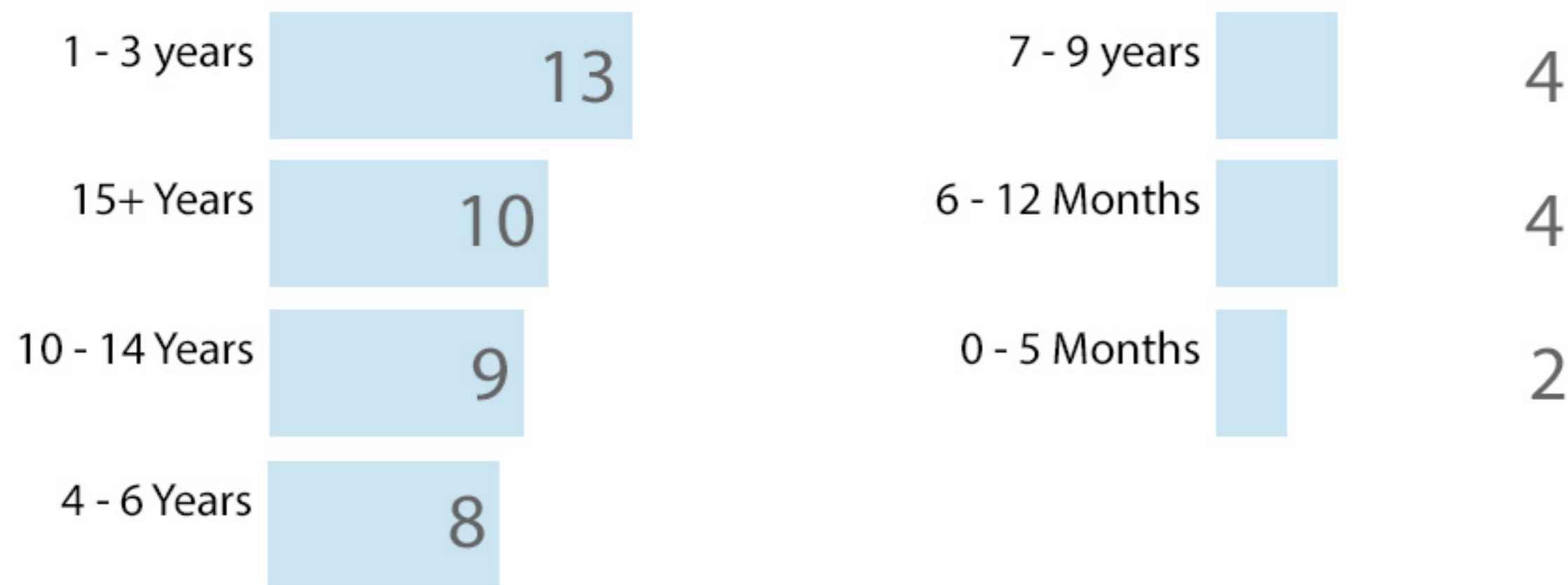
HOW LONG HAS YOUR BUSINESS BEEN OPERATING?

10 Hotels have been in operation for more than 15 years, 4 of these hotels employ more than 100 workers and 2 employ between 51-100 people. 8 Hotels and 1 Hotel Restaurant & Bar have been operating between 10-14 years, and 8 have been in operation for 4-6 years. 4 Hotels have been open between 7-9 years.

13 Hotels have only been operating for between 1-3 years. 4 of these are large hotels employing 100+ people and 3 hotels with 51-100 employees. These 13 Hotels are likely to be just starting to turn a profit for their owners.

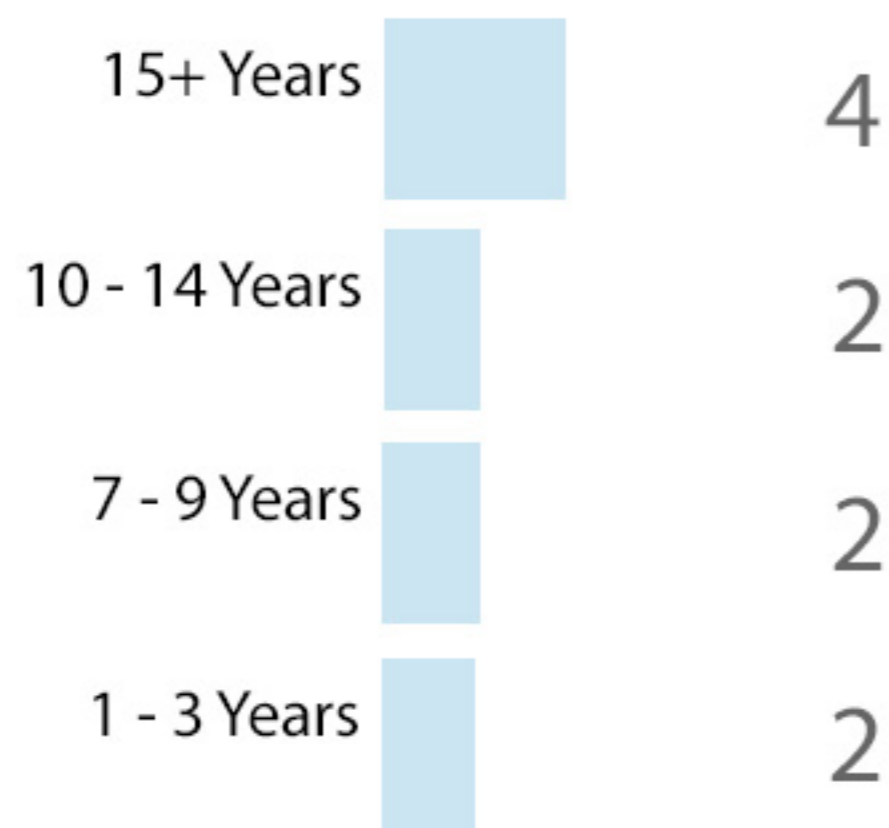
6 Hotels each employing between 1-25 people, have only opened in the last 12 months.

## HOW LONG HAS YOUR HOTEL BEEN OPERATING?



2 Bars and 2 Restaurants have been operating for more than 15 years. 1 Bar and 1 Restaurant have been operating for 10-14 years, 2 Restaurants have been in operation for between 7-9 years and 1 Bar and 1 Restaurant have only been operating for 1-3 years. All of the Bars employ between 1-25 people, except 1 which employs between 26-50 people. 3 Restaurants employ between 1-25 people, and 3 employ 26-50 people.

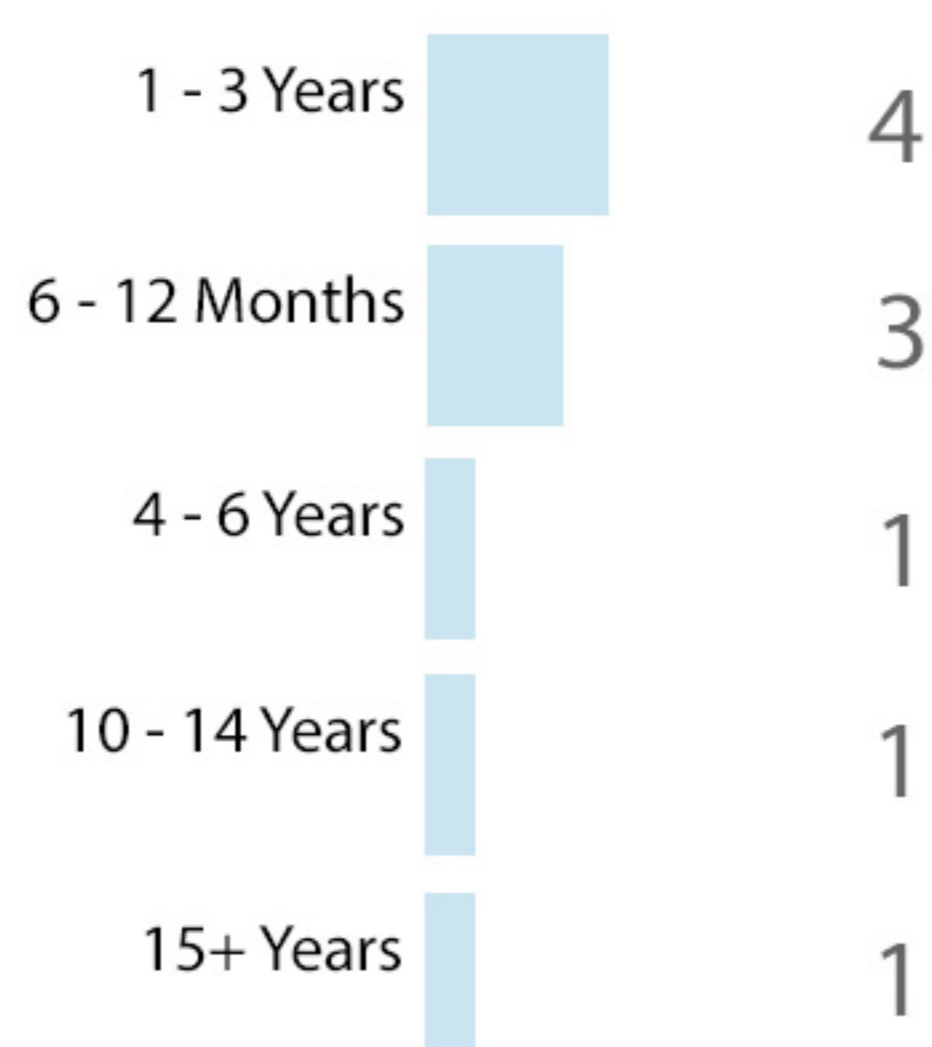
## TITLE HOW LONG HAS YOUR RESTAURANT/BAR BEEN OPERATING?



1 Traditional Travel Agency which also now offers Online Travel Agency (OTA) has been in operation for 15 years or more. 1 Traditional Travel Agency has been in operation for 10-14 years. 2 Traditional Travel Agencies and 1 OTA have only been operating between 6 months and 1 year. 2 OTA's and 2 Traditional Travel Agencies have been operating for 1-3 years. 1 Traditional Travel Agency has been in operation for 4-6 years.

All of the Traditional Travel Agencies and Online Travel Agencies are employing between 1-25 people each. However, the Traditional Travel Agency which expanded to also include Online Travel bookings employs more than 100 people.

## HOW LONG HAS YOUR TRAVEL AGENCY BEEN OPERATING?



1 **Dive Center** has been in operation for more than 15 years and employs more than 100 people. The other Dive Center has been operating for 4-6 years and has between 1-25 employees. 1 **Tour Operator** has only been operating for 1-3 years and employs between 1-25 people. Another **Tour Operator** also employs 1-25 people and has been open for 4-6 years. The third **Tour Operator** has been in the High End/Luxury Travel Business for more than 15 years and employs between 26-50 people.

## HOW LONG HAS YOUR DIVE CENTER/TOUR OPERATOR BEEN IN BUSINESS?



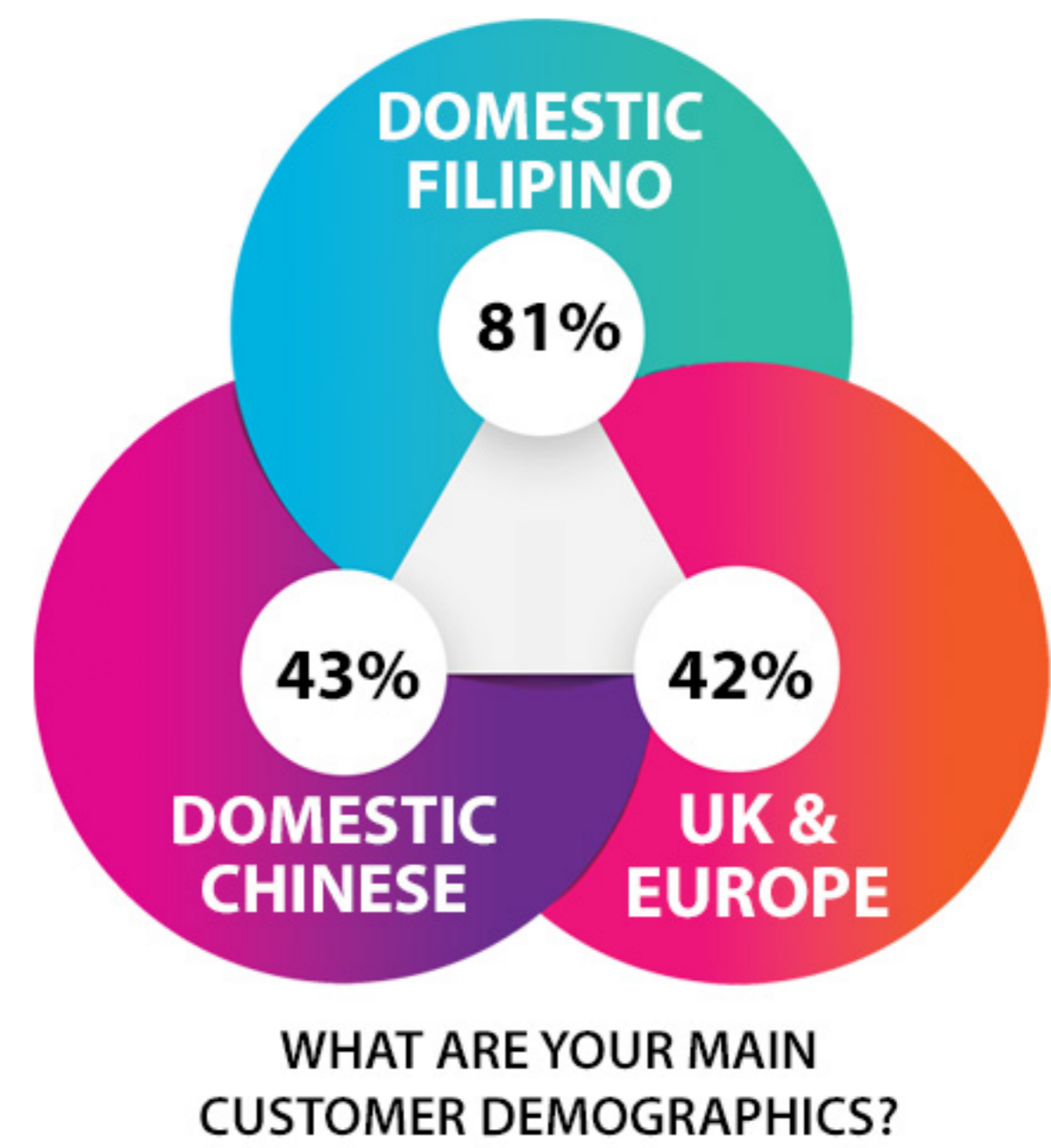
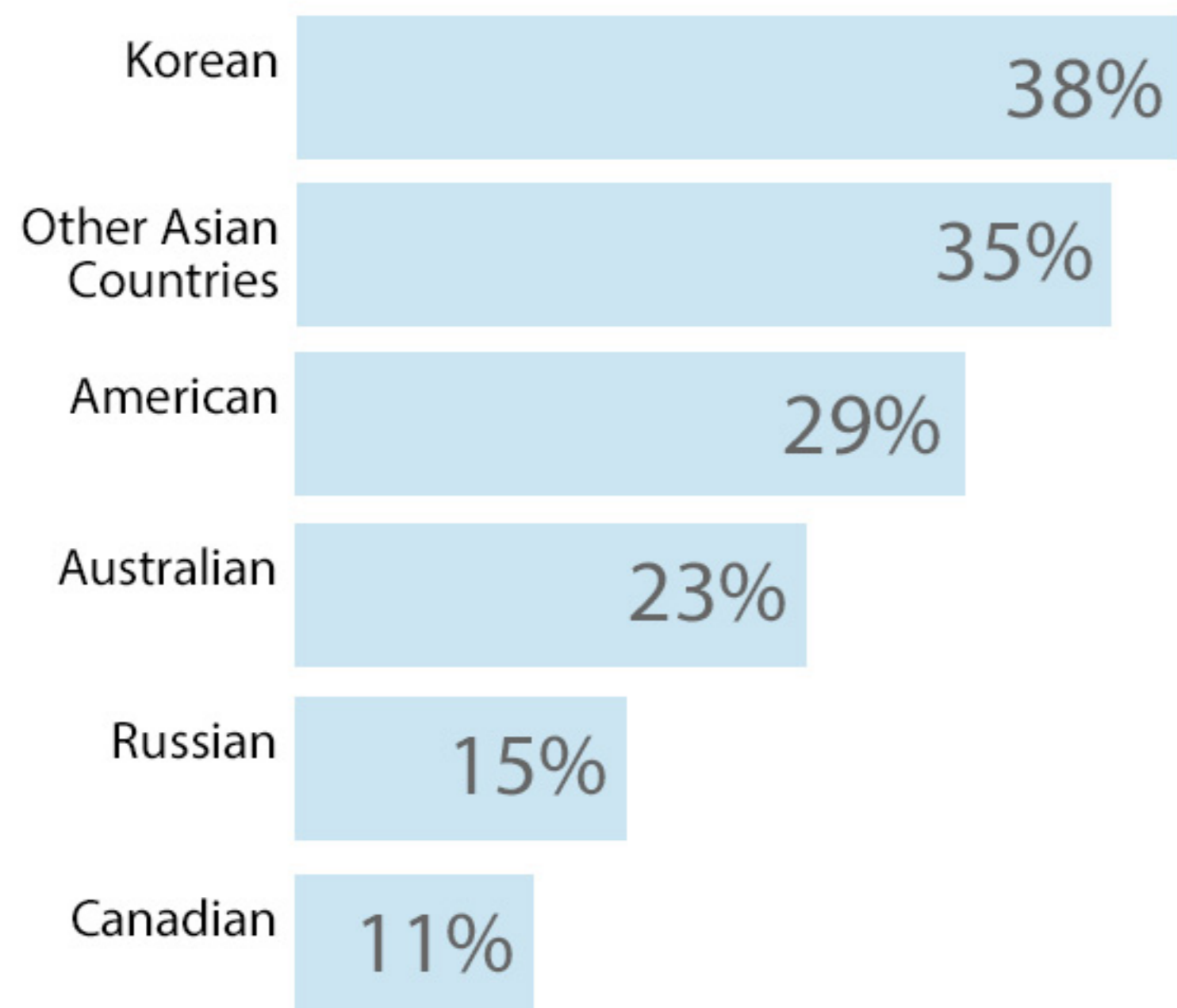
The Spa has been in business for 4-6 years with between 1-25 employees. The Digital Marketing business has been supporting hotels in the Philippines for 10-14 years and has 1-25 employees. The Luxury Retail outfit has also been operating between 10-14 years, with 1-25 employees. The luxury Hotel Supplier has been supplying hotels for 15 or more years, and employs between 1-25 people

## WHAT ARE YOUR MAIN TOURIST/CUSTOMER DEMOGRAPHICS?

We asked those surveyed to tell us their Top 3 Customer Demographics.

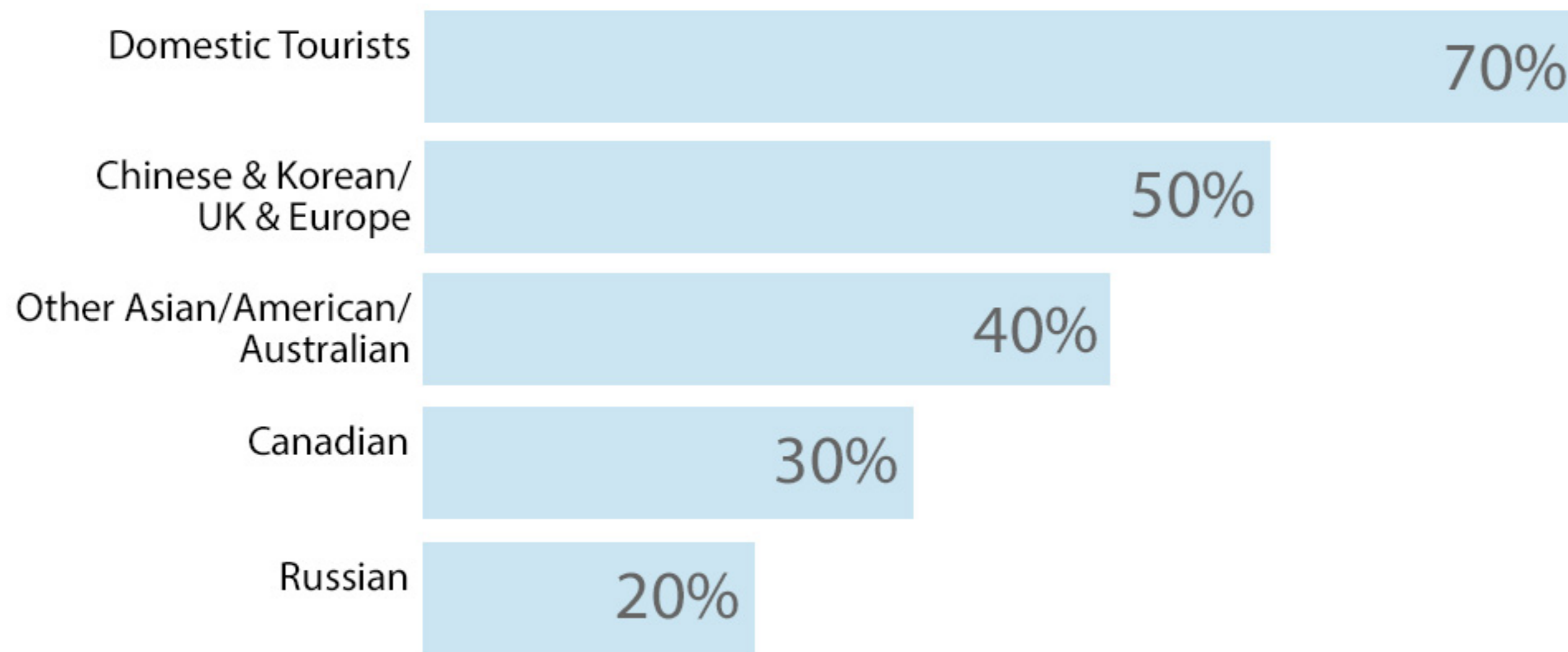
These were Domestic Tourists (81%), Chinese Tourists (43%) and Korean Tourists (38%) when viewed across all the Hospitality & Tourism sectors represented.

### WHAT ARE YOUR MAIN CUSTOMER DEMOGRAPHICS?



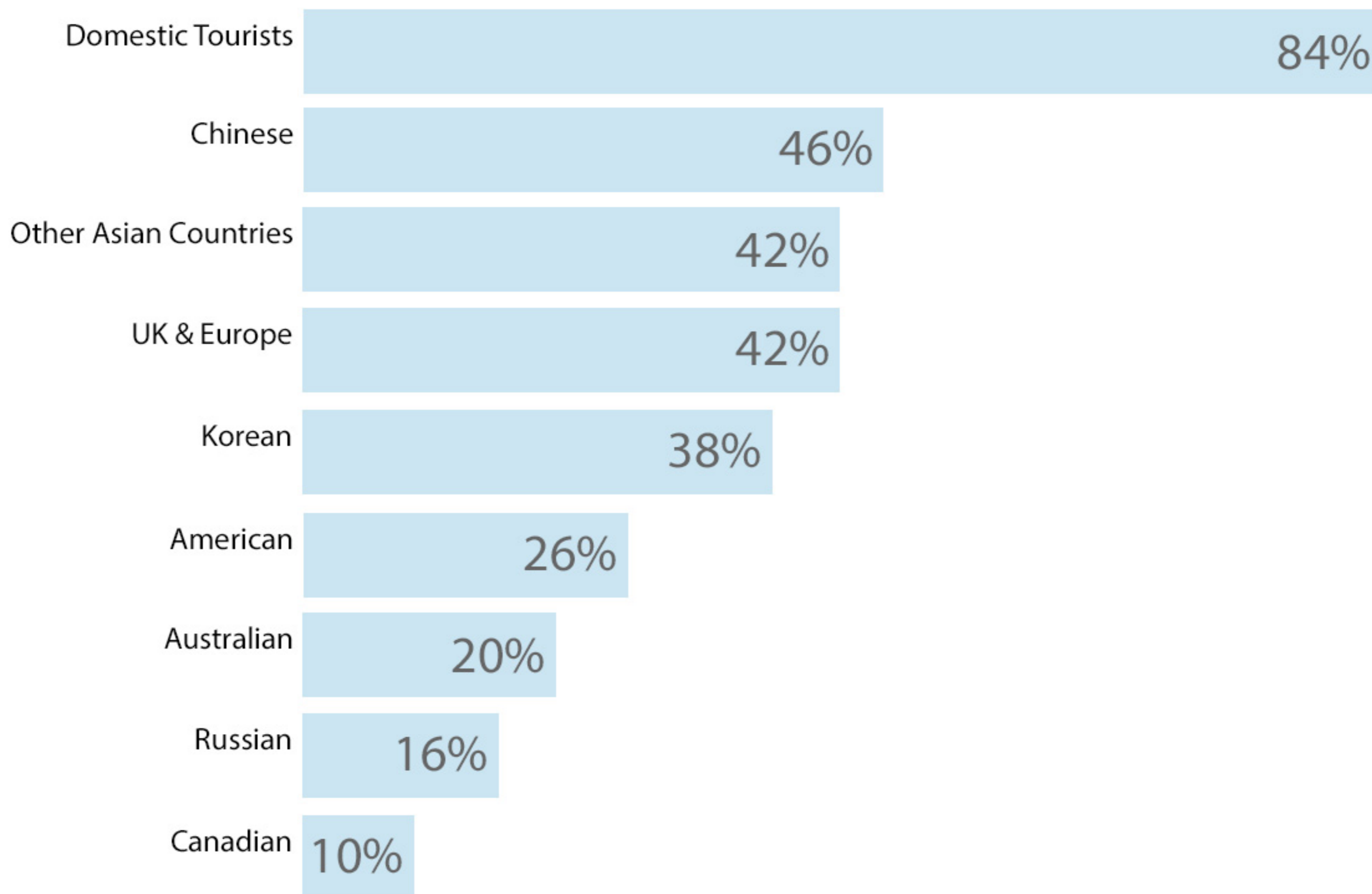
When viewed across the different sectors surveyed this remained relatively consistent, in terms of Top 3. Although the Restaurant/Bar Sector reflected a more even split across all the nationalities.

## MAIN RESTAURANT/BAR CUSTOMER DEMOGRAPHICS



For **Hotels** there were 5 leading guest demographics, although Domestic Tourism remained the main guest Demographic.

## MAIN HOTEL CUSTOMER DEMOGRAPHICS



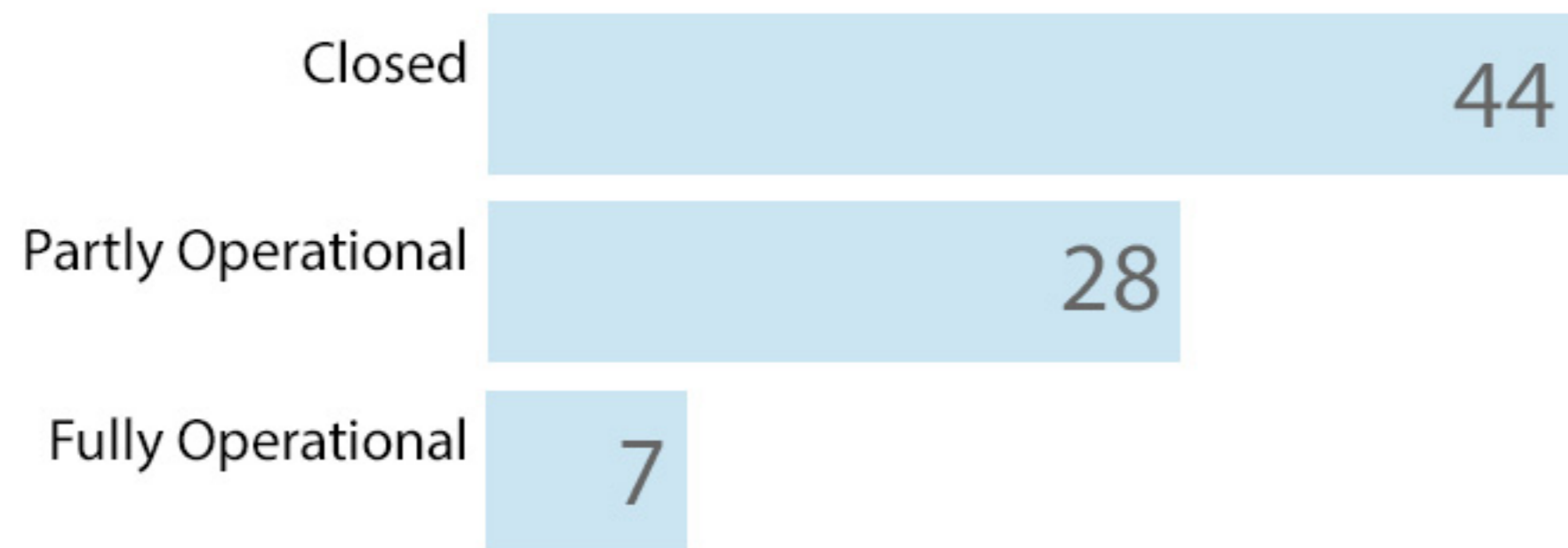
For **Travel Agencies and Online Travel Agencies** their main demographic was also Domestic Tourism (90%). Their second top demographic was both Korean and American at 30% each. Their remaining guests were 10% Chinese, 10% Other Asian Countries and 10% UK & European.

The **Tour Operator and Dive Center** Sectors bucked the trend with their Top Demographic being the UK & European Market at 100%; everyone stated that this tourism market was one of their top 3 demographics. Followed by 80% Australian Tourists and 60% Domestic Tourists or 60% American Tourists.

## IS YOUR BUSINESS FULLY OPERATIONAL?

9% of those taking part advised that their business is Fully Operational. 35% advised that they are Partly Operational. The remaining 56% of businesses are closed (see Appendix 1).

### IS YOUR BUSINESS FULLY OPERATIONAL?

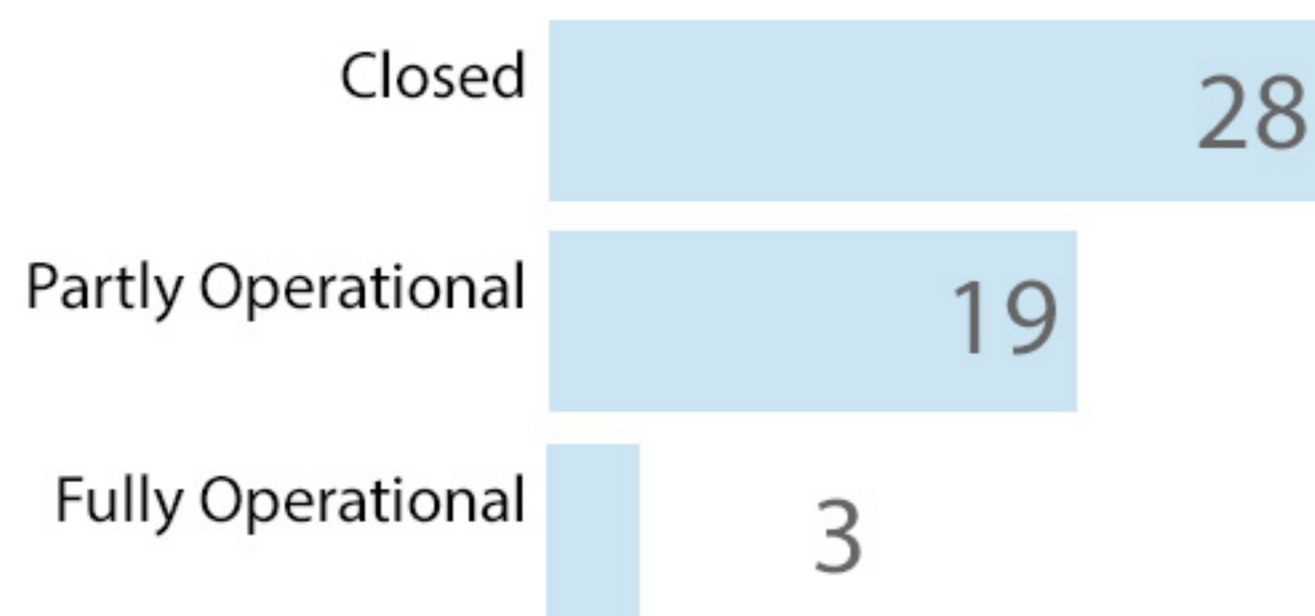


Within the **Hotel Sector** only 6% said they were Fully Operational: 1 Hotel in Region 6, 1 Hotel in Region 13 and 1 Hotel in NCR.

38% of Hotels were Partly Operational, 1 Hotel in Region 1 and Region 4, 2 Hotels in Region 3, 4 Hotels in Region 6 and in Region 7. There were 2 partly operating Hotel in Region 10 and 5 Hotels in NCR.

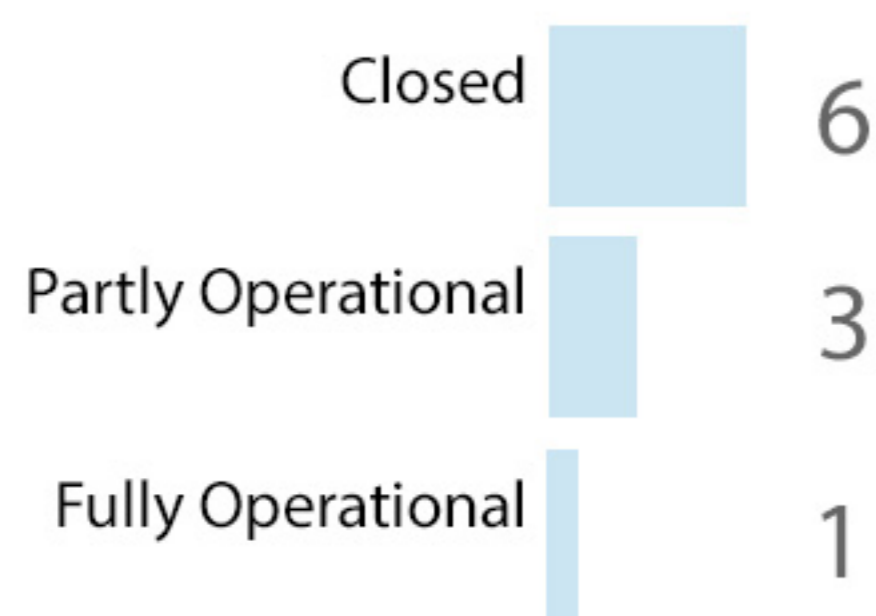
3 of the Hotels, that were listed as closed, were still offering some services (What % Of Your Employees Are Working During ECQ pages 24-26)

### IS YOUR HOTEL FULLY OPERATIONAL?



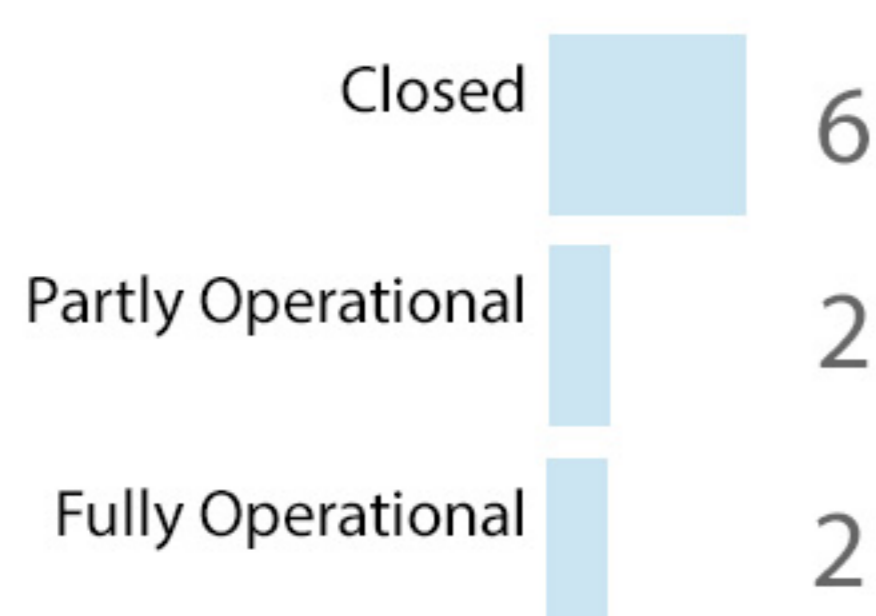
Within the **Restaurant/Bar Sector** 1 Restaurant in Region 6 was Fully Operational. 3 Restaurants were Partly Operational; 1 in Region 3 and 2 in NCR.

### IS YOUR RESTAURANT/BAR FULLY OPERATIONAL?



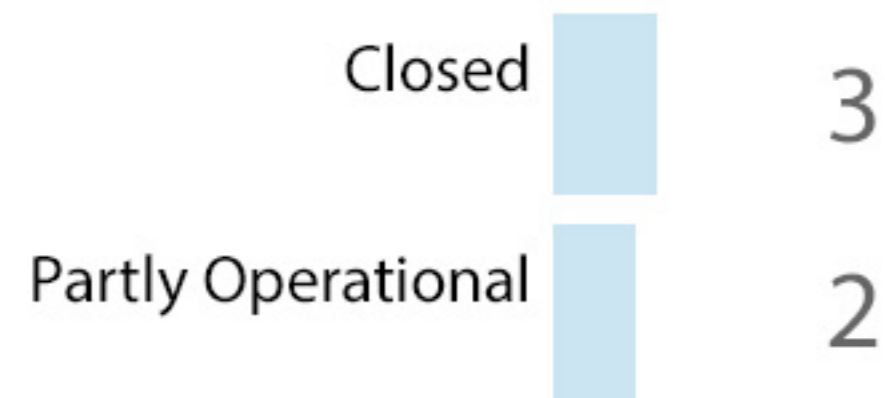
There were a total of 4 **Travel Agencies** who were Fully, or Partly Operational. 1 OTA in Region 1 and 1 Traditional Travel Agency in Region 11 answered that they were Fully Operational. One OTA in Region 1 and 1 OTA in NCR were Partly Operational. The remaining 6 were closed.

### IS YOUR TRAVEL AGENCY FULLY OPERATIONAL?



2 **Tour Operators** in NCR were Partly Operational but did not indicate what they were doing. The other Tour Operator was closed, as were the 2 Dive Centers.

### IS YOUR TOUR OPERATOR/DIVE CENTER FULLY OPERATIONAL?



The **Hotel Supplier** and **Marketing Software** companies were both Partly Operational and based in NCR.

The **Retail Business** is located in Region 6 and remains Fully Operational.

### HOTEL SECTOR BY REGION

28 Hotels were closed during ECQ, and at the time they undertook this survey. Of the 22 Hotels who were Fully or Partly Open, and the 3 that were closed but still providing services:

Region	Guests prior to 17th March	Guests from other hotels prior to 17th March	Essential Workers Staying	BPO Staff Staying	OFW	Quarantine	Food Contracts for BPO or Essential Workers	Kitchen Open for Take-out/Delivery	Airport Transfer OFW or Foreign Nationals
2	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>						
3	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			
3	<input checked="" type="checkbox"/>								
3			<input checked="" type="checkbox"/>						
3					<input checked="" type="checkbox"/>				
4					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
4								<input checked="" type="checkbox"/>	
6			<input checked="" type="checkbox"/>						
6	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>	
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7	<input checked="" type="checkbox"/>							<input checked="" type="checkbox"/>	
7					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
7	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
10	<input checked="" type="checkbox"/>								
10	<input checked="" type="checkbox"/>								
13	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>							
NCR						<input checked="" type="checkbox"/>			
NCR	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>		
NCR	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>				
NCR	<input checked="" type="checkbox"/>								
NCR					<input checked="" type="checkbox"/>				

### PARTLY OPEN & OPEN RESTAURANTS OR BARS

6 Restaurants and Bars were closed. Of the remaining 4 Restaurants:

- Four Restaurants remained Open For Takeout & Delivery (Region 3, Region 6 and 2 in NCR)
- 1 NCR-based Restaurant was also undertaking Food Drives/Relief and had a contract to Provide Food to Essential Workers.

## PARTLY OPEN & OPEN TRADITIONAL TRAVEL AGENCIES & ONLINE TRAVEL AGENCIES

Of the 2 Travel Agencies and 2 OTA's which remained Fully or Partly Open:

- 1 Region 11 Travel Agency was taking bookings for Late 2020 & Handling Cancellations, Refunds and Re-bookings.
- 1 NCR Travel Agency and 2 OTA's were handling Cancellations, Refunds and Re-bookings (Region 1 & NCR).

## PARTLY OPEN NCR-BASED HOTEL SUPPLIER & MARKETING SOFTWARE COMPANIES

The Marketing Software company remained Partly Open to assist existing Hotel clients with their websites, existing bookings, Cancellations and Re-bookings, along with any issues with the software.

The Hotel Supplier Partly opened again as some Regions or locations entered in to relaxed quarantine levels and began to prepare to re-open.

## HOW MANY PEOPLE DO YOU NORMALLY EMPLOY?

56% of those surveyed stated that they normally employ between 1-25 people; 22 Hotels, 3 Bars, 3 Restaurants, 5 Traditional Travel Agents, 4 OTA's, 1 Dive Centre, 1 Tour Operator, 1 Spa, 1 Supplier, 1 Marketing Software company and 1 Retail Shop.

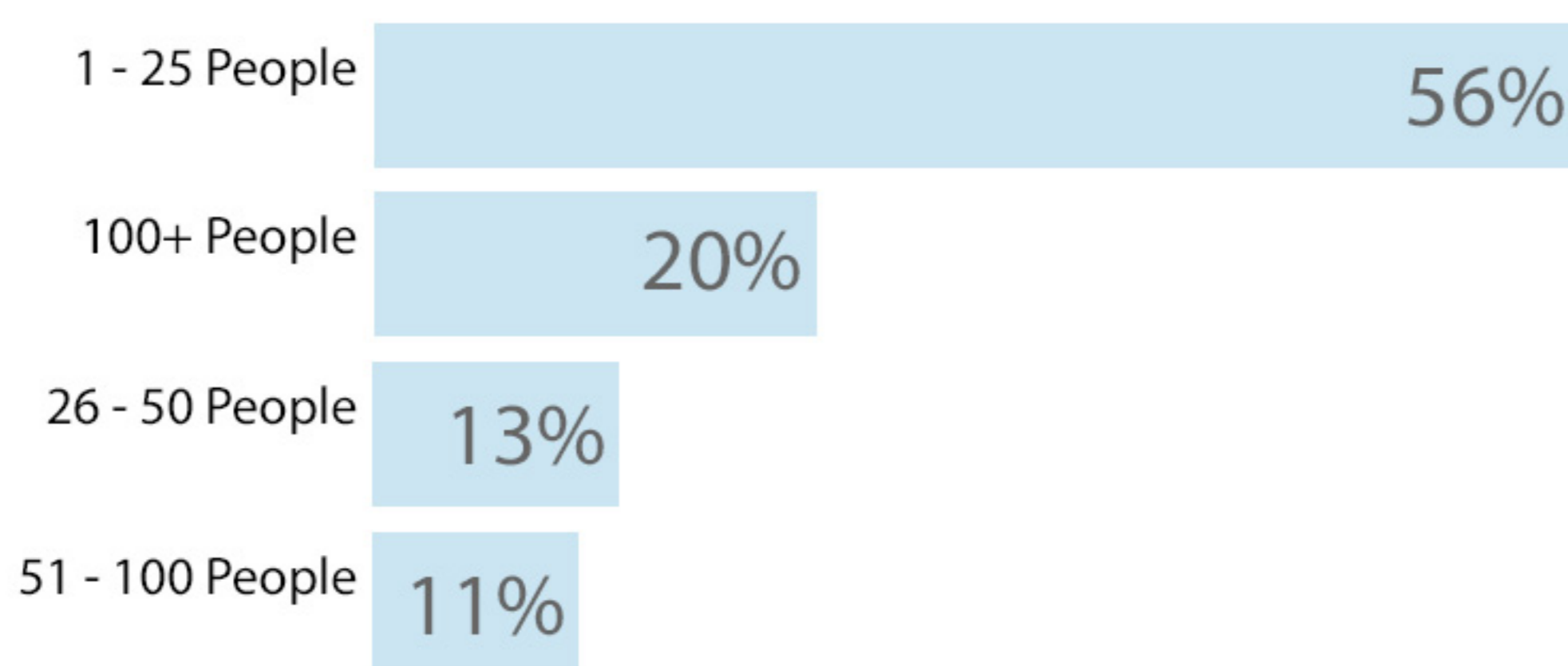
20% normally employ more than 100 people; 13 Hotels including a hotel in the Maldives managed by a Filipino, 1 Traditional & Online Travel Agency, 1 Dive Centre and 1 Tour Operator.

13% of businesses normally employ 26-50 people; 6 Hotels, 3 Restaurants and 1 Bar.

A further 9 Hotels normally employ 51-100 people.

We next asked the respondents what the current situation was for their employees.

### HOW MANY PEOPLE DO YOU NORMALLY EMPLOY?



## WHAT % OF YOUR EMPLOYEES ARE WORKING FULL-TIME DURING ECQ?

The largest group responding to this survey was from the Hotel Sector (50 people). Their response was broken down by the number of people they normally employ, to indicate the impact of ECQ on employment levels within Hotels.

The hotels with lower numbers of staffing (1-25 employees) were more likely to retain 100% of their employees on a Full-Time Basis, or retain 100% of their employees on a Part-Time Basis (32%). However 27% of this group had placed 100% of their employees on No Work No Pay. 14% of hotels have retained a mix of Part and Full time staffing. Only one hotel had already terminated some of their staff contracts.

There were no Hotels, with between 26-50 employees, that had retained staff on either 100% Full or 100% Part-time hours. And 1/3rd of this category of Hotel have 100% of their staff on No Work No Pay. However, no Hotels in this group have terminated any staff contracts.

Only 1 Hotel with between 51-100 Employees has 100% of staff on No Work No Pay. However, 1/3rd have 50% or more of their staff on No Work No Pay. 1/3rd of this group have also terminated some of their staff contracts.

The largest hotels, with 100+ employees, were less likely than the other groups to have kept 100% of their staff on Full or Part-time Hours; only one hotel did. 15% of this group have 100% of their staff on No Work No Pay.



31% of these largest hotels had terminated the contracts of some of their staff. 38% of these larger hotels had a mixed approach, retaining some Full and some Part-Time staff, placing some on No Work No Pay and terminating some contracts.

The Full break down is below.

## OF THE 22 HOTELS WHICH NORMALLY EMPLOY BETWEEN 1-25 PEOPLE

Region	Age of Business	Status	Full-Time	Part-Time	No Work No Pay	Terminated	
4	6 - 12 Months	Closed	100%				
4	1 - 3 Years	Closed			100%		
5	0 - 5 Months	Closed			100%		
6 Hotel Restaurant Bar	10 - 14 Years	Closed		100%			
6	0 - 5 Months	Partly Open		100%			
6	10 - 14 Years	Closed	40%			20%	
6	10 - 14 Years	Partly Open	70%		30%		
6	3 - 4 Years	Closed			100%		
6	4 - 6 Years	Closed			100%		
6	1 - 3 Years	Partly Open			3 people		
6	4 - 6 Years	Partly Open	Declined To Answer				
6 (Long-Stay Accom)	1 - 3 Years	Closed		100%			
7	6 - 12 Months	Partly Open		100%			
7	6 - 12 Months	Partly Open	20%	30%			
7	15+ Years	Closed			100%		
7	7 - 9 Years	Closed	Declined To Answer				
7	4 - 6 Years	Closed	Declined To Answer				
10	7 - 9 Years	Partly Open	50%	50%			
10	7 - 9 Years	Partly Open			100%		
13	1 - 3 Years	Open	100%				
NCR	1 - Years	Partly Open	100%				
NCR	4 - 6 Years	Open	100%				

## OF THE 6 HOTELS WHICH NORMALLY EMPLOY BETWEEN 26-50 PEOPLE

Region	Age of Business	Status	Full-Time	Part-Time	No Work No Pay	No Mention of Other Staff
1	15+ Years	Partly Open	10%			90%
2	6 - 12 Months	Closed			100%	
3	1 - 3 Years	Partly Open	30%			70%
3	4 - 6 Years	Closed	50%	50%		
7	15+ Years	Partly Open			50%	50%
NCR	15+ Years	Closed		2%	98%	

## OF THE 9 HOTELS WHICH NORMALLY EMPLOY BETWEEN 51-100 PEOPLE

Region	Age of Business	Status	Full-Time	Part-Time	No Work No Pay	Terminated
4	10 - 14 Years	Closed	40%		60%	
4	1 - 3 Years	Closed	1%	5%	44%	55%
6	15+ Years	Open	25%	35%		
6	10 - 14 Years	Partly Open	10%	20%	65%	5%
6	1 - 3 Years	Closed		17%	83%	
NCR	1 - 3 Years	Partly Open		50%	50%	
NCR	15+ Years	Closed			100%	
NCR	10 - 14 Years	Partly Open			50%	
NCR	10 - 14 Years	Partly Open	20%		70%	10%

## OF THE 13 HOTELS NORMALLY EMPLOYING 100+ PEOPLE

Region	Age of Business	Status	Full-Time	Part-Time	No Work No Pay	Terminated	
3	15+ Years	Closed		100%			
3	4 - 6 Years	Partly Open			100%		
3	15+ Years	Closed			100%		
4	10 - 14 Years	Partly Open	20%	20%	30%	30%	
6	1 - 3 Years	Closed		80%			
6	4 - 6 Years	Closed	5%	3%	92%		
6	15+ Years	Closed		10%	40%	50%	
6	1 - 3 Years	Closed	Declined To Answer				
7	15+ Years	Closed	2%		98%		
7	1 - 3 Years	Partly Open	10		90%		
7	10 - 14 Years	Closed		40%	50%	10%	
NCR	7 - 9 Years	Partly Open	10%	5%	20%	65%	
Maldives	1 - 3 Years	Closed	10%		90%		

Of the other Hospitality & Tourism sectors represented in this survey (29 people), only 21% have kept some of their staff on Full-Time, with 2 managing to retain 100% of their employees on Full-Time Hours. One was an Online Travel Agency, the other a Restaurant, both are operating in NCR.

38% have been able to retain some of their employees on Part-Time Hours. Two Businesses had 100% of their employees on Part-Time hours, at the time of the survey (June/July 2020). 1 was a Retail Shop in Region 6 and 1 was a Traditional Travel Agent & OTA in NCR. Both have been operating for more than 14 years.

31% of businesses have 100% of their workforce on No Work No Pay

## OF THE 22 BUSINESSES WHICH NORMALLY EMPLOY BETWEEN 1-25 PEOPLE

Region	Business Type	Age of Business	Status	Full-Time	Part-Time	No Work No Pay	Terminated	
1	OTA	1 - 3 Years	Partly Open		20%	80%		
3	Restaurant	7 - 9 Years	Partly Open		80%	20%		
4	OTA	6 - 12 Months	Closed			100%		
4	Travel Agency	6 - 12 Months	Closed			100%		
4	Dive Centre	4 - 6 Years	Closed	38%	62%			
4	Tour Operator	1 - 3 Years	Closed	Declined To Answer				
6	Retail Shop	10 - 14 Years	Open		100%			
6	Bar	1 - 3 Years	Closed			100%		
6	Bar	15+ Years	Closed			100%		
6	Bar	10 - 14 Years	Closed	Declined To Answer				
6	Spa	4 - 6 Years	Closed			100%		
11	Travel Agency	6 - 12 Months	Open			100%		
NCR	OTA	1 - 3 Years	Open	100%				
NCR	OTA	1 - 3 Years	Partly Open	50%				
NCR	Restaurant	1 - 3 Years	Partly Open	100%				
NCR	Restaurant	15+ Years	Partly Open	30%		70%		
NCR	Travel Agency	1 - 3 Years	Closed			100%		
NCR	Travel Agency	1 - 3 Years	Closed	Declined To Answer				
NCR	Travel Agency	10 - 14 Years	Closed			25%		
NCR	Tour Operator	4 - 6 Years	Partly Open		50%			
NCR	Marketing Software	10 - 14 Years	Partly Open	10%	30%	10%	50%	
NCR	Hotel Supplier	15+ Years	Partly Open		75%	25%		

## OF THE 5 BUSINESSES WHICH NORMALLY EMPLOY BETWEEN 26-50 PEOPLE

Region	Business	Status	Age of Business	Part-Time	No Work No Pay
1	Bar	Open	15+ Years	Declined To Answer	
6	Restaurant	Open	15+ Years	50%	
6	Restaurant	Closed	10 - 14 Years		100%
NCR	Tour Operator	Partly Open	15+ Years	30%	70%
NCR	Restaurant	Closed	7 - 9 Years		100%

## OF THE 2 BUSINESSES WHICH NORMALLY EMPLOY BETWEEN 100+ PEOPLE

Region	Business	Status	Age of Business	Part-Time	No Work No Pay
7	Dive Centre	Closed	15+ Years	25%	75%
NCR	Travel Agent & OTA	Closed	15+ Years	100%	

## ADAPTING YOUR BUSINESS DURING ECQ

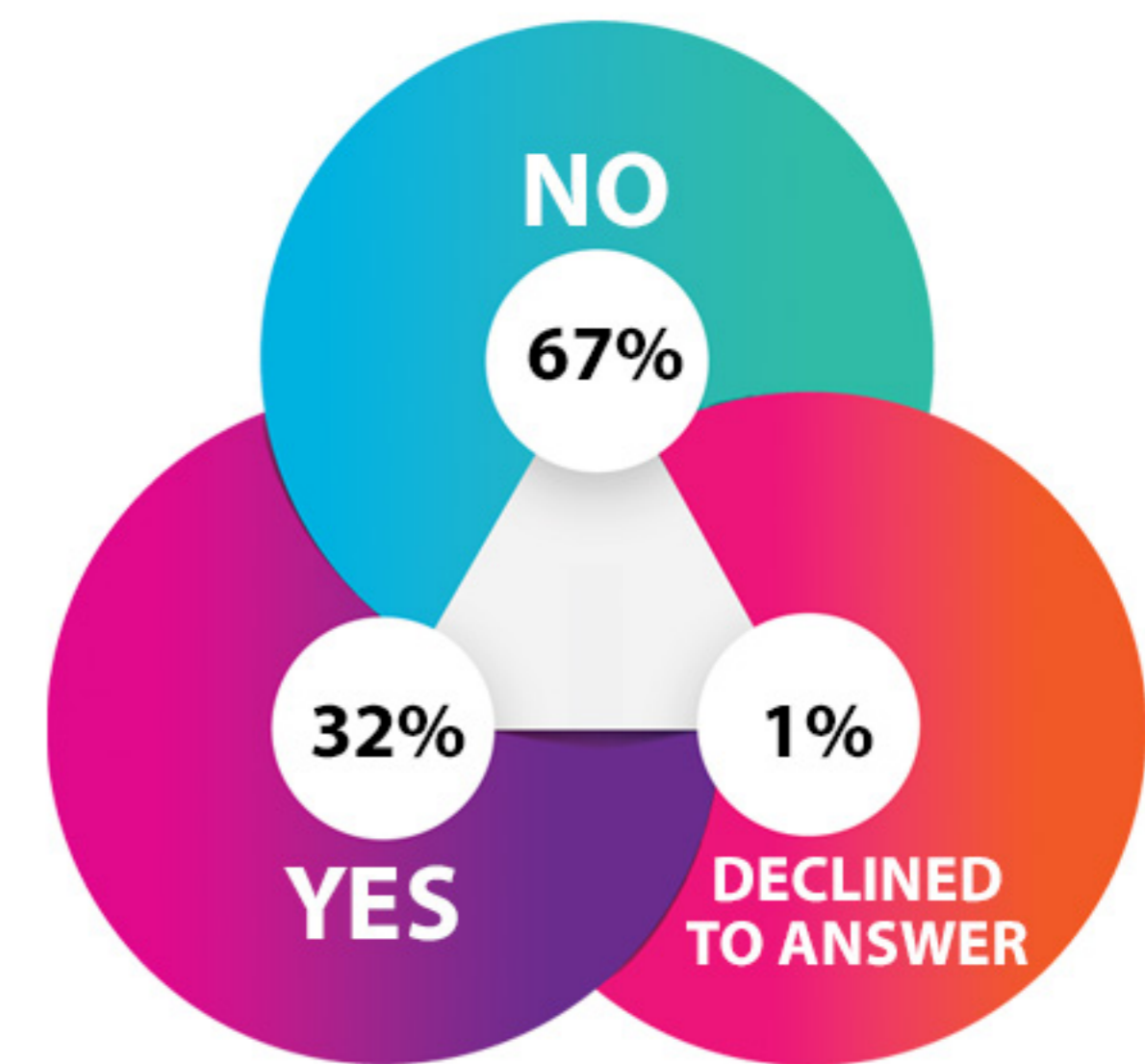
32% had been able to adapt their business to enable some employees to work from home. 26% of Hotels, 20% of Restaurants, 60% of Travel or Online Travel Agencies, 40% of Tour Operator or Dive Centres, the Hotel Supplier and the Marketing Software company.

Of the 13 Hotels, 71% have between 1-25% of their employees working from Home, 14% have 26-50% of their employees working from Home. 7% have 75-84% working from Home.

Of the two Restaurants, 1 has 1-25% of their employees working from Home. The other has between 85-100% working from Home.

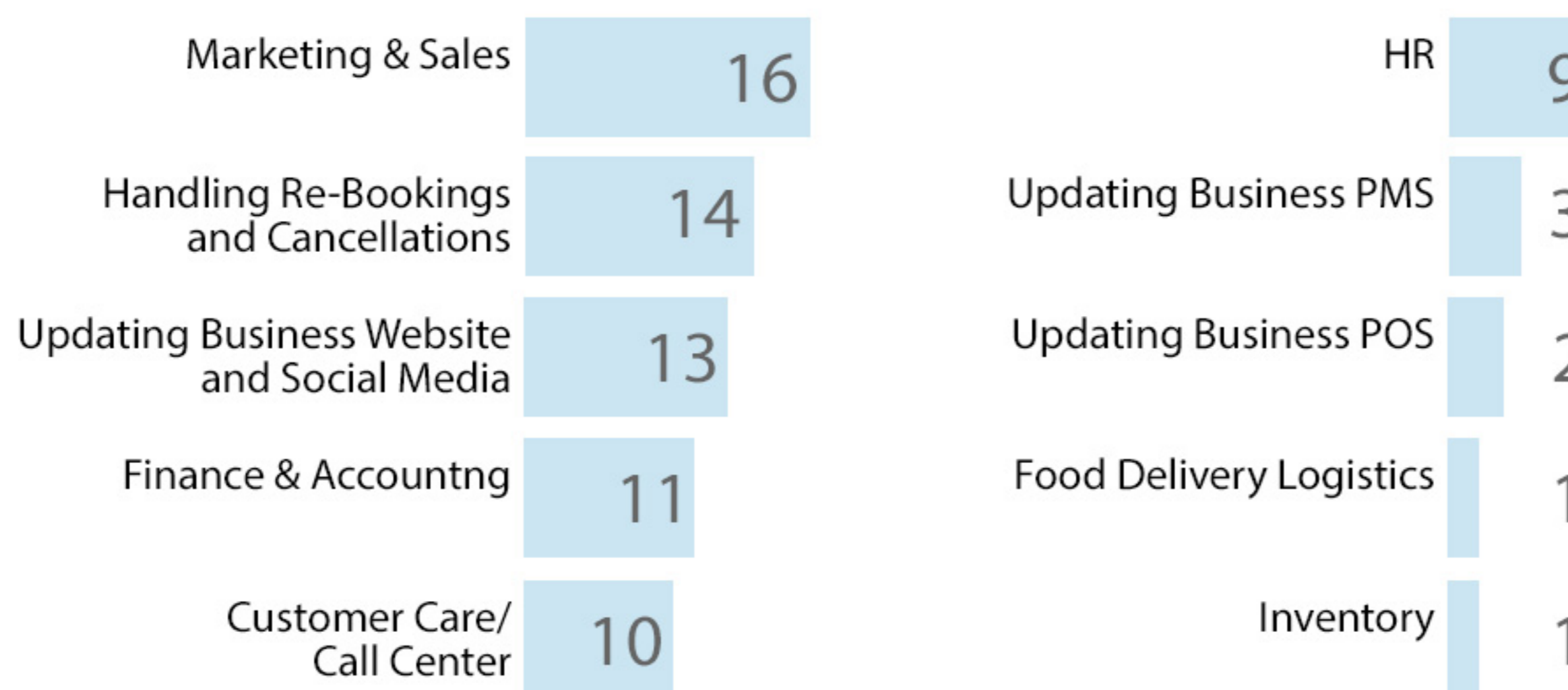
Of the 6 Travel and Online Travel Agencies 60% have between 1-25% of their employees working from Home. 1 Online Travel Agency has 54-70% working from Home. 1 Online Travel Agency and 1 Traditional Travel Agency has 85-100% working from Home.

2 Tour Operators have 24-49% of their employees working from Home. The Hotel Supplier has 1-24% working from Home and the Marketing Software Company has 85-100% of their remaining employees working from Home and advise they will not be renewing the lease on their office.



HAVE YOU BEEN ABLE TO ADAPT YOUR BUSINESS?

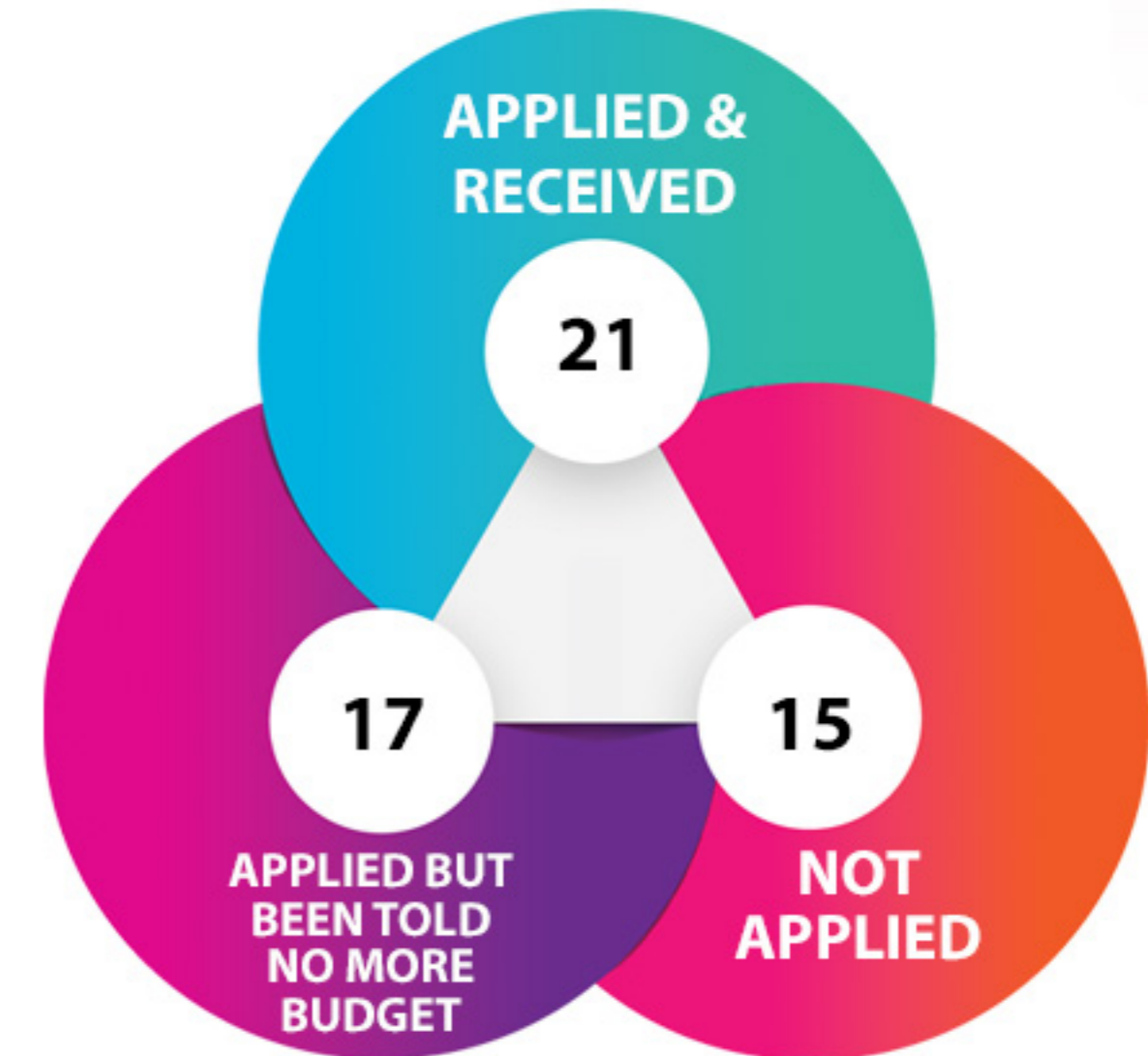
## WHAT WORK IS BEING UNDERTAKEN BY HOME-WORKING STAFF?



## HAVE YOU APPLIED FOR DOLE (AMP) FOR YOUR EMPLOYEES?

52 Owners or Senior Managers, out of 79, stated that they had applied for DOLE (AMP) at the time of the survey (June/July 2020). 15 did not apply and 12 declined to answer the question.

- 40% Applied and received the payment.
- 33% Applied and were told No More Budget
- 15% Applied and were declined
- 6% applied and received acknowledgement of their application
- 6% applied and were waiting for acknowledgement of their application

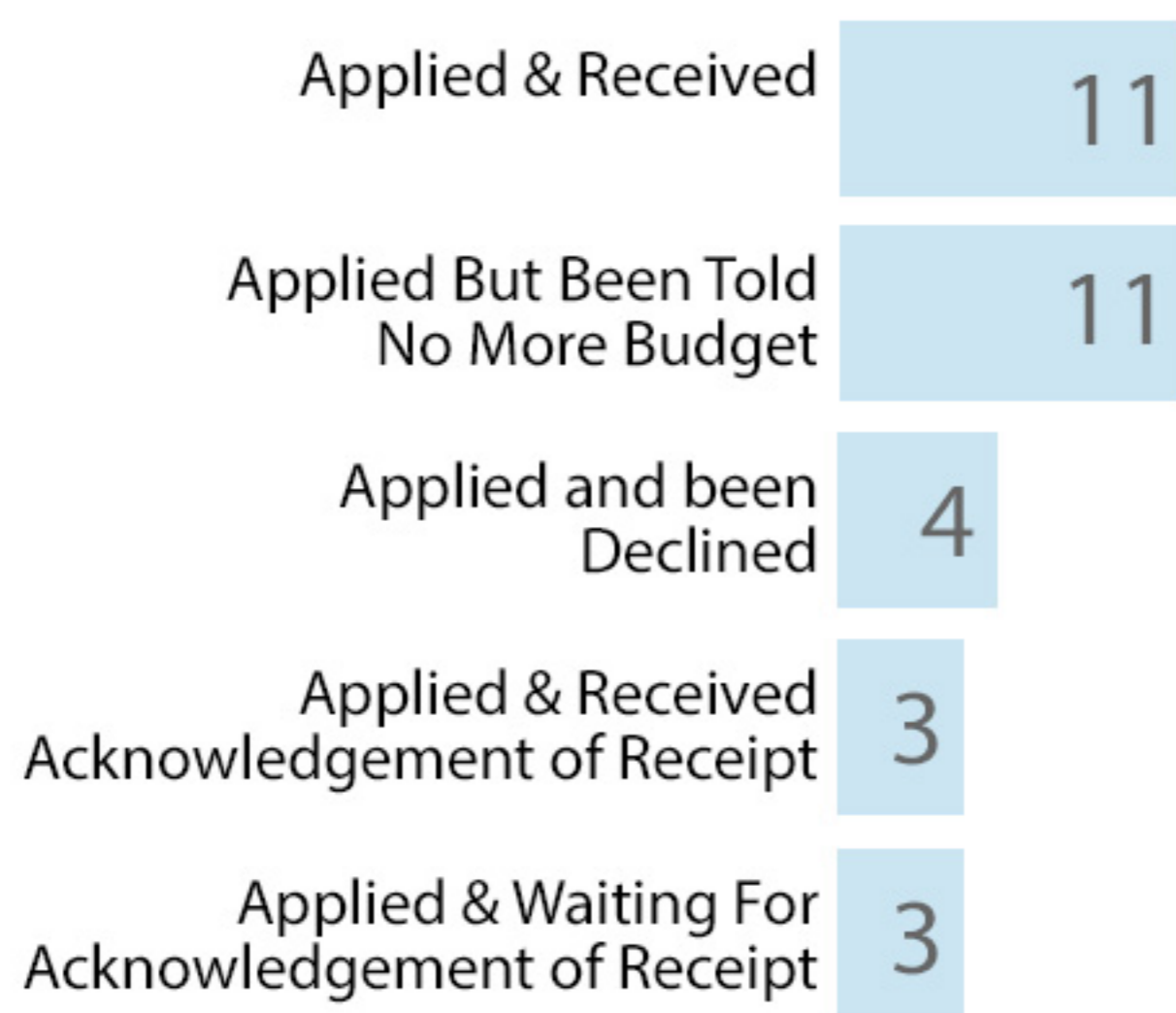


HAVE YOU APPLIED FOR DOLE (AMP)?

### Hotels

- 22% Applied & Received DOLE (AMP)
- 22% applied and were told no more budget.
- 8% applied and were declined
- 6% applied and received acknowledgement of their application
- 6% applied and were awaiting acknowledgement of their application
- 18% hadn't applied.

### HOTELS – THAT APPLIED FOR DOLE (AMP)



### Restaurant/Bars

- 1 Bar (Region 1) and 3 Restaurants (1 Region 3 and 2 in Region 6) applied and received DOLE (AMP).
- 2 Bars in Region 6 and 1 NCR based Restaurant applied and were told there was no more budget available.

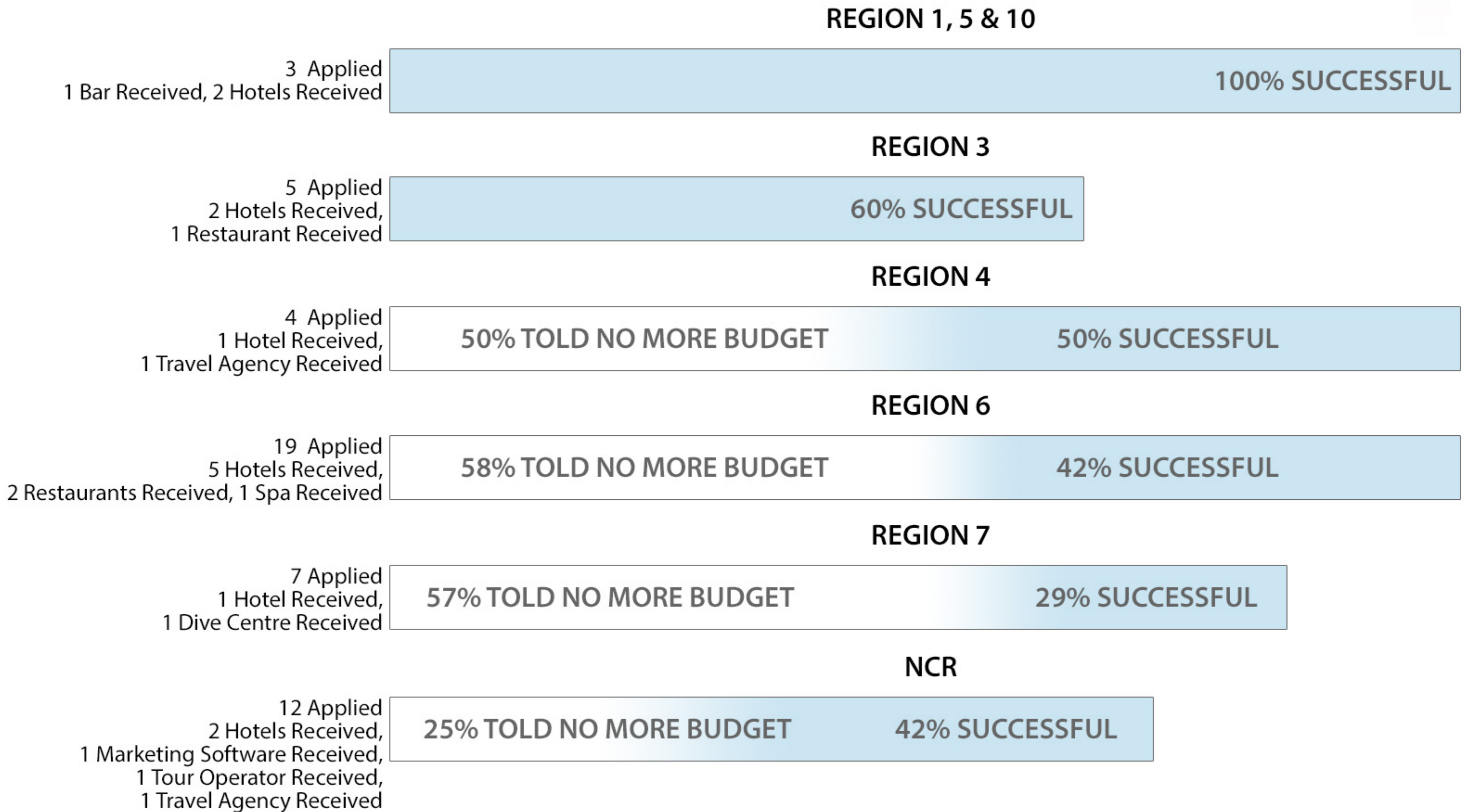
### Travel Agencies & OTA's

- 1 Travel Agency in NCR, and 1 in Region 4 received DOLE (AMP).
- 4 applied but were declined; 1 Travel Agency in Region 11 1 NCR based Travel Agency, 1 Travel Agency & OTA in NCR and 1 NCR based OTA.

### Tour Operator/Dive Centre

- 1 NCR based Tour Operator and 1 Dive Centre in Region 7 Applied for, and received DOLE (AMP).
- 1 NCR based Tour Operator Applied but was declined. 1 Region 4 Tour Operator applied and was told there was no more budget.
- Region 4 Dive Centre declined to answer.
- The Region 6 Spa applied and received.
- The NCR Based Marketing Software company applied, was declined but then received.
- The Region 6 Retail shop applied but was told there was no more budget.

## DOLE (AMP) APPLICATIONS BROKEN DOWN BY REGION

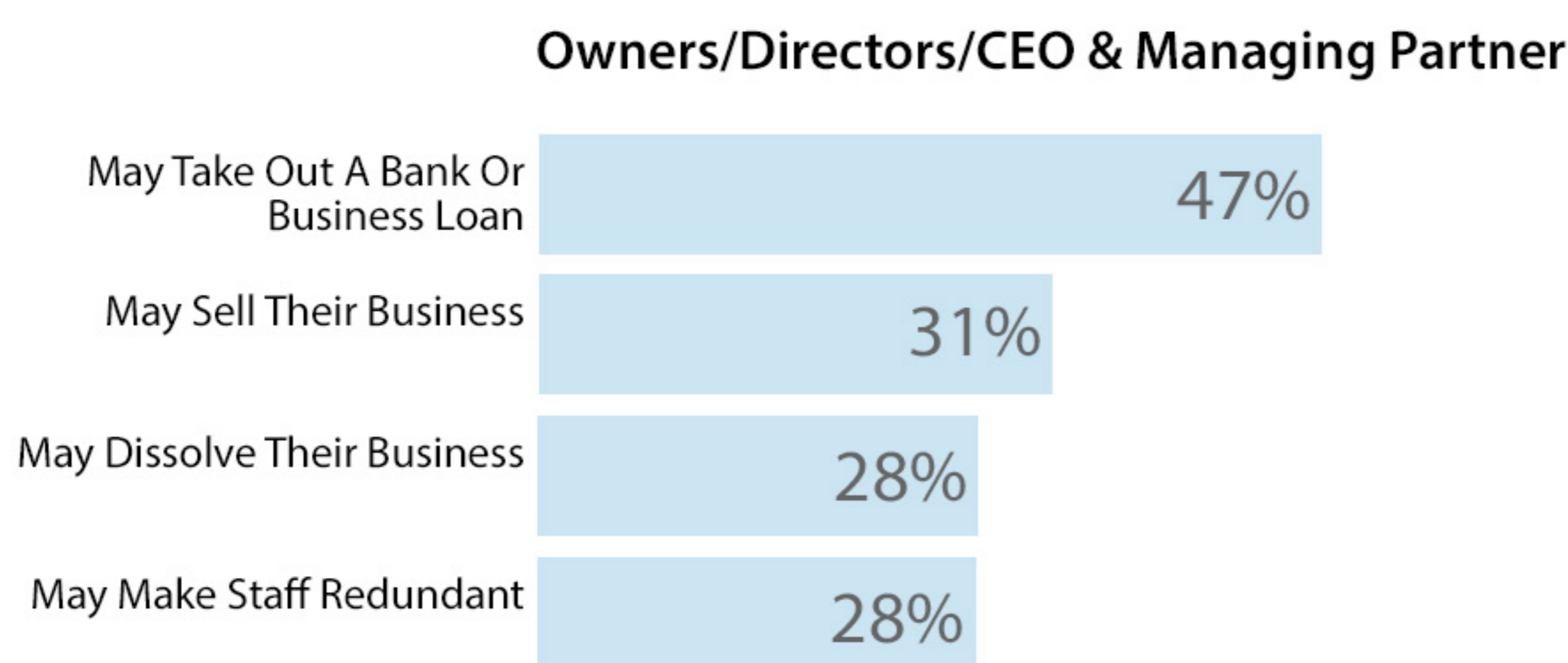


### 8 Business had their (DOLE AMP) Applications Declined:

- Region 5: 1 Hotel (1-25 Employees)
- Region 6: 1 Hotel (1-25 Employees) and 1 Hotel Restaurant & Bar (1-25 Employees)
- Region 7: 1 Hotel (1-25 Employees)
- Region 11: 1 Travel Agency (1-25 Employees)
- NCR: 1 Tour Operator (1-25 Employees), 1 Travel Agency & OTA (100+ employees) and 1 Travel Agency (1-25 employees)

## WHAT ACTIONS ARE YOU CONSIDERING IN ORDER TO MANAGE YOUR BUSINESS DURING CLOSURE?

27 Owners, 3 Directors, 1 CEO and 1 Managing Partner were surveyed. 56% of this group said they are considering either dissolving or selling their hotel. Between them these hotels potentially employ 500 people (based on information provided re: number of employees). 33% of these Hotels are each employing between 1-25 people.

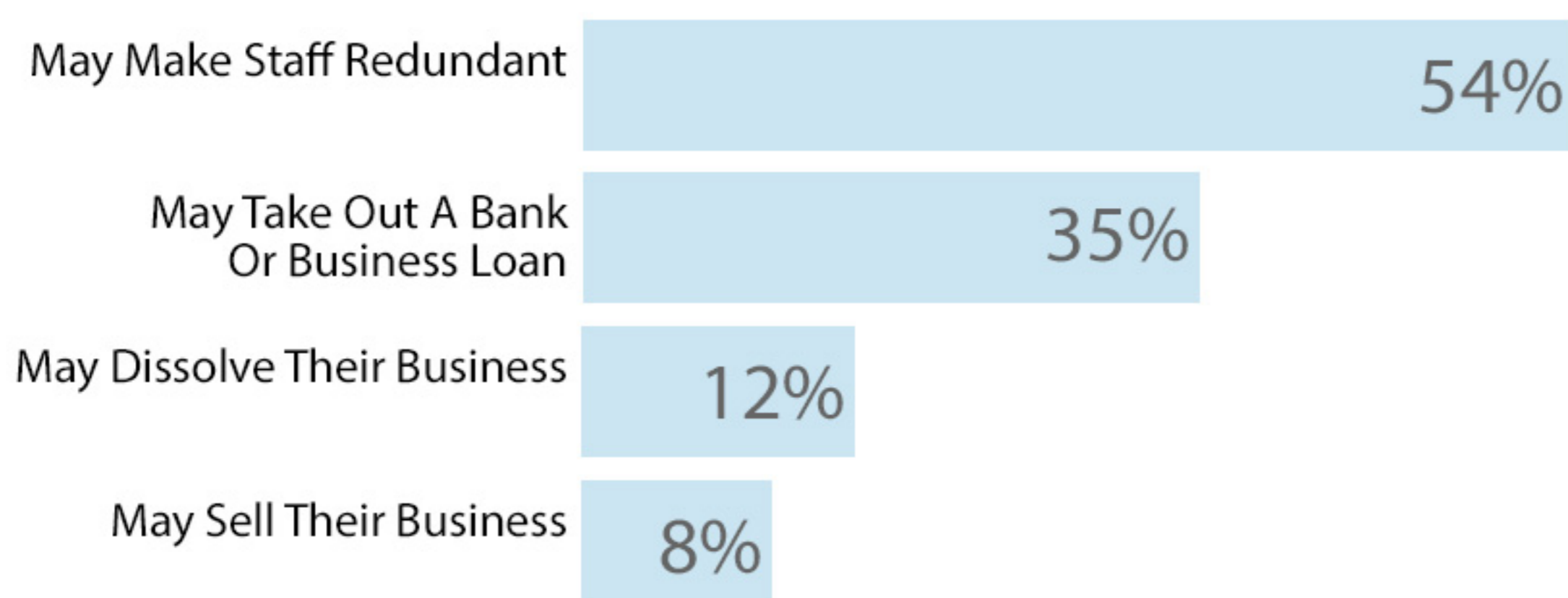


28% of Hotel Owners were considering staff redundancies, with a combined 375 employee work force; 2 Hotels with 100+ employees said redundancies were being considered.

3 Travel Agencies, 2 Restaurants, the Spa and the Marketing Software Owners were considering taking out a Bank or Business Loan. 39% of Hotel Owners were considering a Bank or Business Loan.

50% of Travel Agencies/OTA Owners were considering dissolving their business and/or 38% were looking at Staff Redundancies.

## Senior Managers



Among the 26 Senior Managers surveyed 54% stated that the business was looking at Staff Redundancies in order to get through the lock down period and beyond.

It was to be expected that Managers would list Redundancies as, effectively, this is an area within their responsibility/decision-making level.

Understandably, as Managers are not the overall decision makers only 20% advised that dissolving or selling the business was being considered. This may be because such decisions are not being discussed with them at this point. Many would, however, be aware that companies or owners are considering a bank loan as an option.

A Total of 54% of Businesses were considering a Bank Loan or Business Loan when they took the survey in June/July. This was already 3 months in to ECQ in the Philippines and whilst some Regions were being earmarked for soft opening to Domestic Tourists from within the same region, the reality has shown that the local market has not 'bounced back' as hard as the Industry had hoped. Most likely because so many people have been affected by the ECQ with job losses, loss of salary and an inability to travel outside of their own region. Added factors such as the requirements and papers for traveling, the likelihood of a period of quarantine or self-isolation on their return, as well as fear of the virus itself, may impact on people's willingness to take a holiday.

When we also compare this against the Number 1 demographic highlighted earlier; Domestic Tourism, this is worrying. For almost all of the sectors represented in this survey, Domestic Tourism is one they rely on most and even this is almost non-existent due to varying degrees of Community Quarantine across the country and cancelled Domestic Flights, restricting travel. Other countries that have been hit hard by the virus, in terms of contraction and death rates, have already reduced lock-down levels and actively encouraged Domestic Tourism during their summer months, in order to boost the economy and save the Industry.

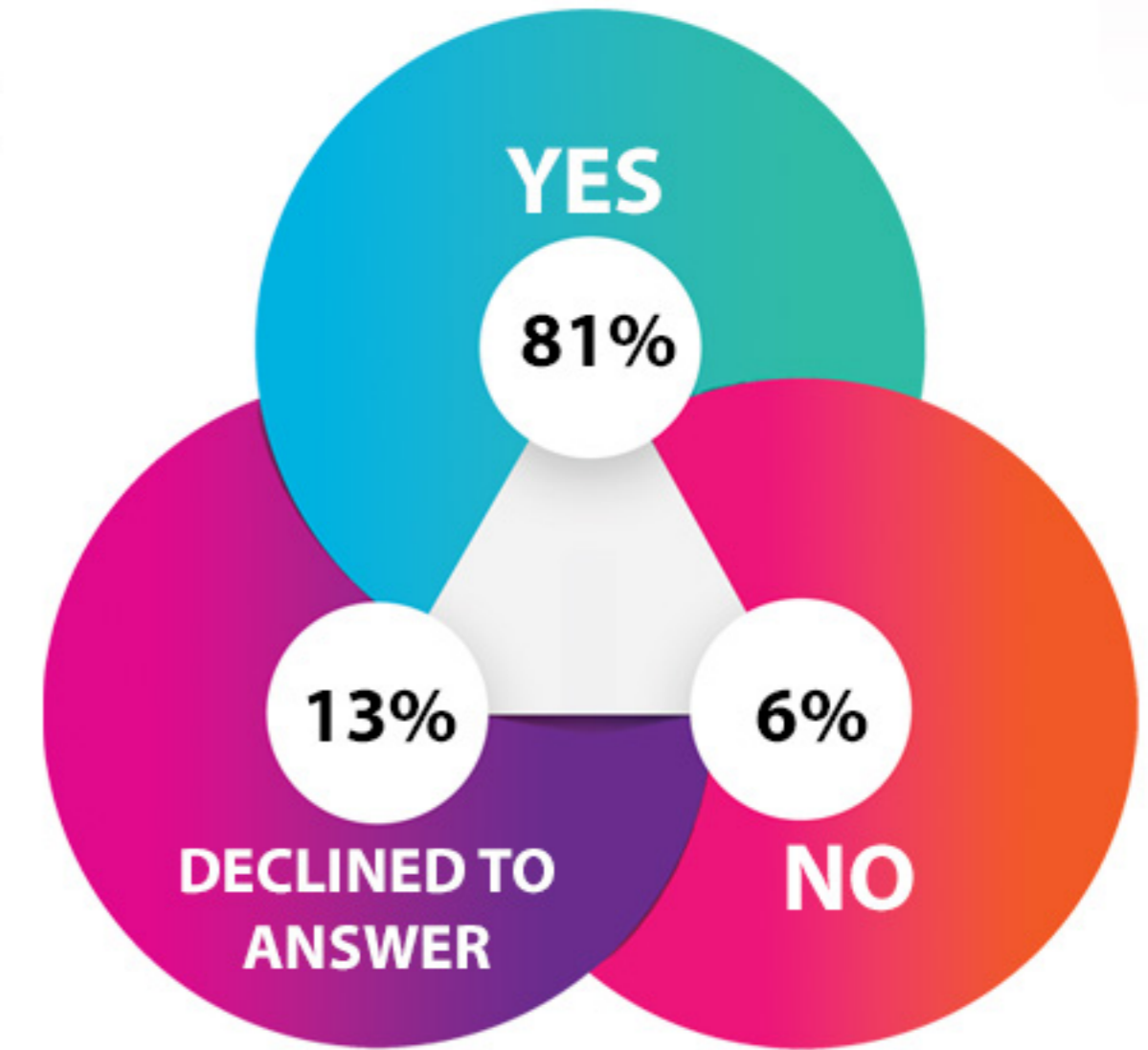
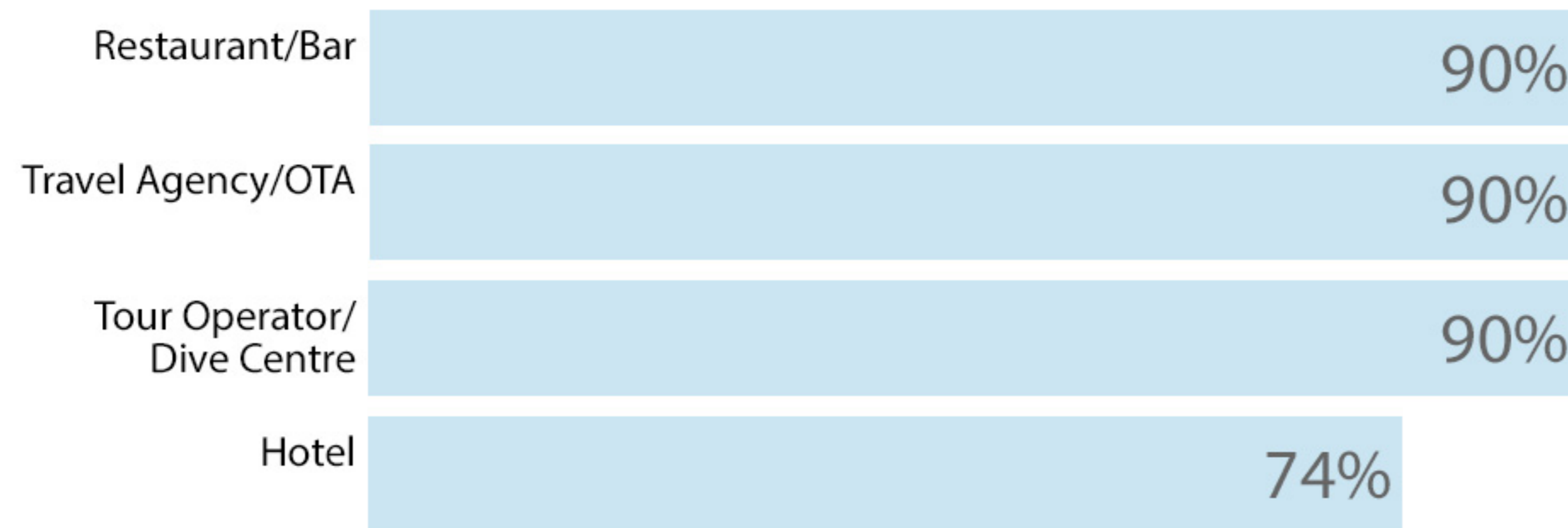
Returning to the 54% of Businesses considering a Bank or Business Loan Is it realistic to expect successful applications for loans for Hospitality & Tourism businesses? Not just because of the current financial climate but also due to the country's borders remaining closed to International Tourists and its destinations remaining closed to Domestic Tourists. Hospitality & Tourism Businesses will also be competing for Bank or Business Loans against other industries, which will most likely be in full operation long before them.

Of the businesses represented in this survey 35% have been in operation for three years or less (see Appendix 2). This is quite indicative of a significant growth period for the Philippine Tourism Industry in recent years, which has seen visitor numbers increase year on year after successful and targeted Ad Campaigns. 8.26 Million Tourists visited the Philippines in 2019; a 15.24% growth on 2018's year-end figure of 7.16 million. The tourism sector has, up until 2020, been a key economic driver of the Philippines with tourism revenue reaching a total of USD9.31 billion, in 2019.

In terms of Bank and Business Loans Hospitality and Tourism may well have been a 'safe bet' in 2018 or 2019. Whether it will be considered so for those applying for loans in 2020 is another matter, when much of the World is 'locked down.'

## SURVIVAL MODE

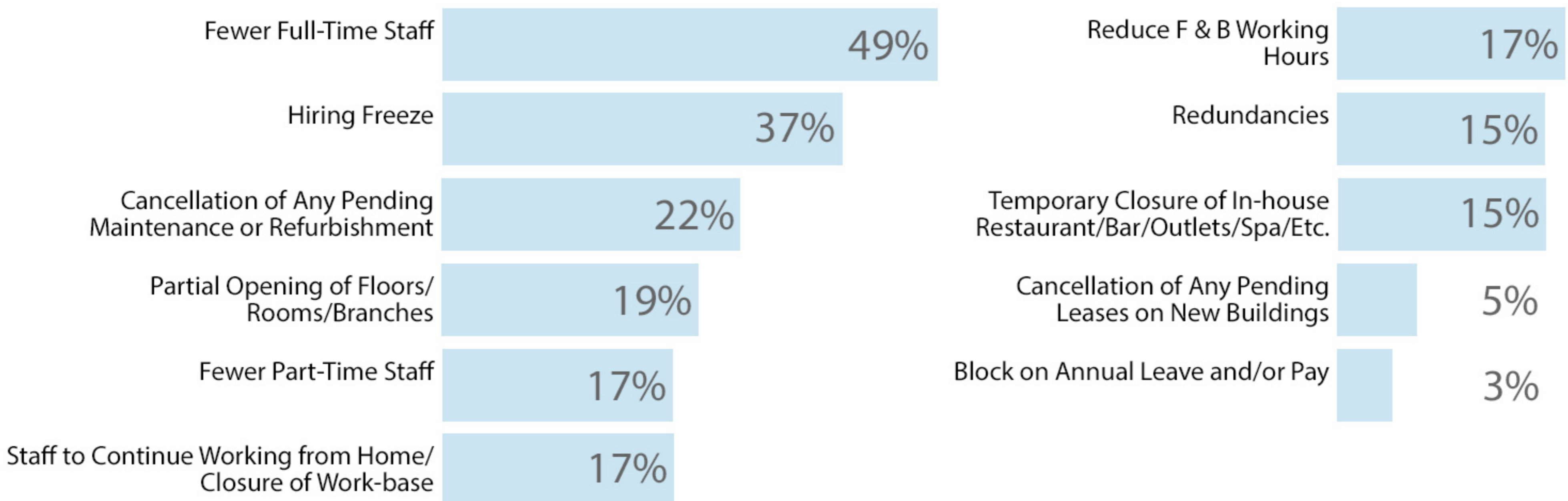
We asked Owners and Managers if they would apply any cost-cutting methods to reduce their overheads. 81% said they would be making cuts to areas of expenditure to try to survive this period of reduced tourism. 6% said that they wouldn't be making any other expenditure cuts and 13% declined to answer.



HAVE YOU REDUCED OVERHEADS DURING ECQ?

The Spa, Hotel Supplier, Marketing Software and Retail business all said they would be reducing their overheads

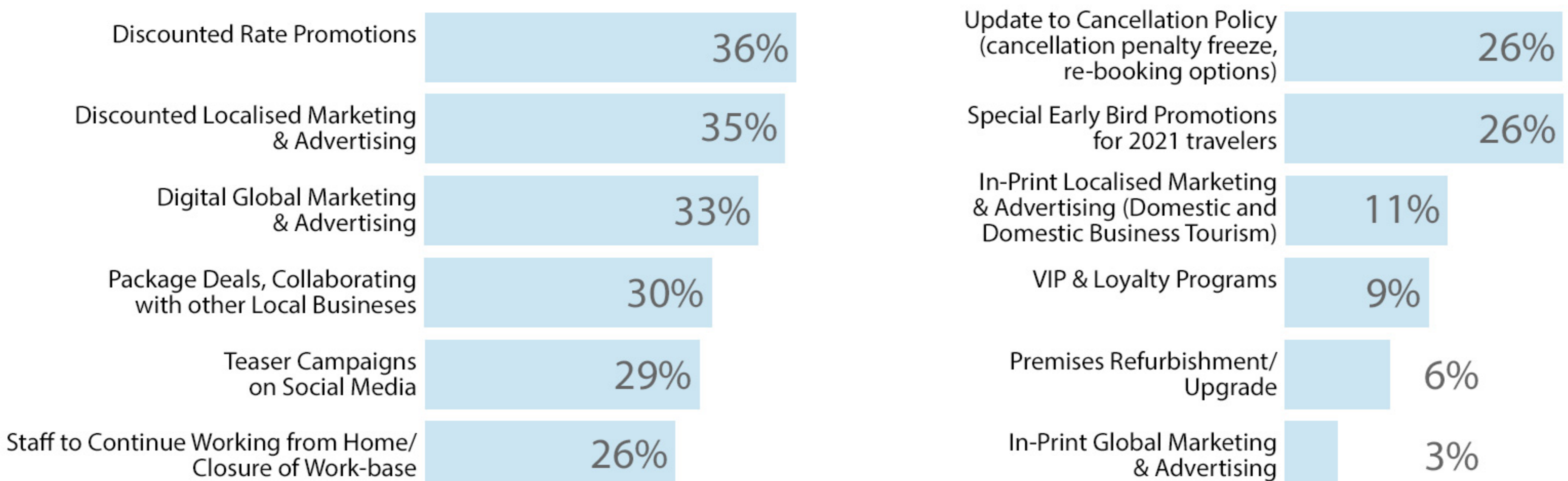
### How Will You Reduce Your Overheads?



## POSITIONING FOR RECOVERY

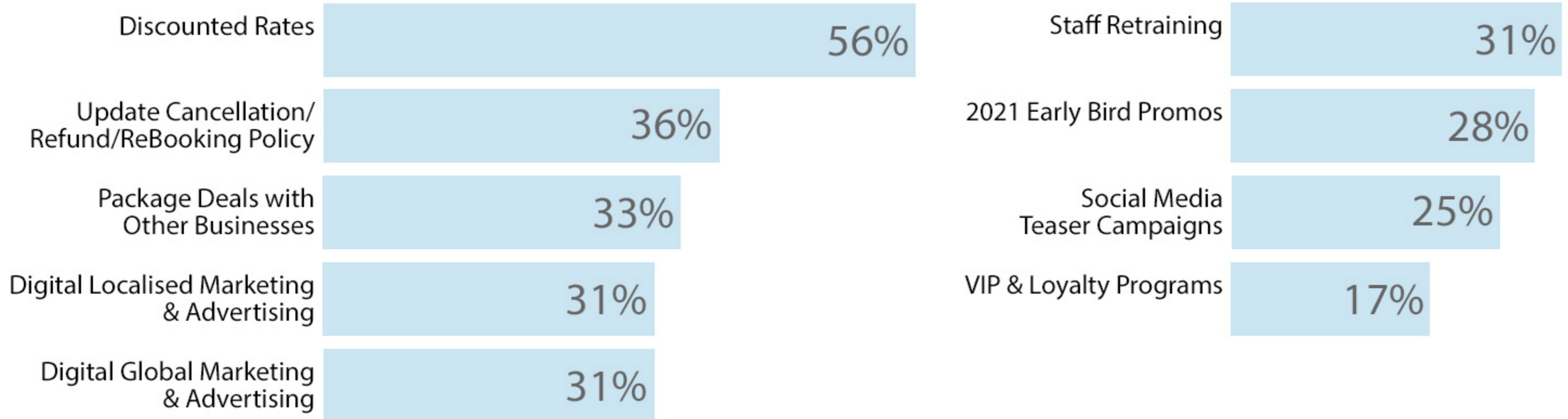
We also asked Owners and Managers if they intended to increase expenditure or activity in other areas to encourage bookings when they are able to open again. 68% said that they would increase expenditure or activities in some areas.

### Are you considering increasing your spending or focus in any areas to better position yourself for the Tourism Bounce-Back?

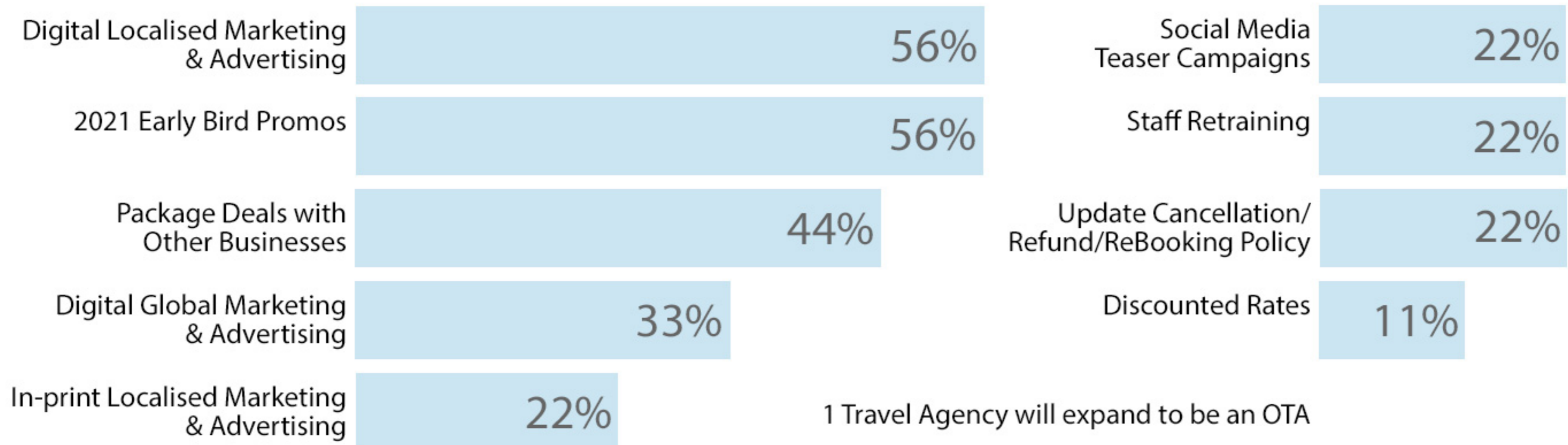


Intentions to increase expenditure or activity in other areas, by sector:

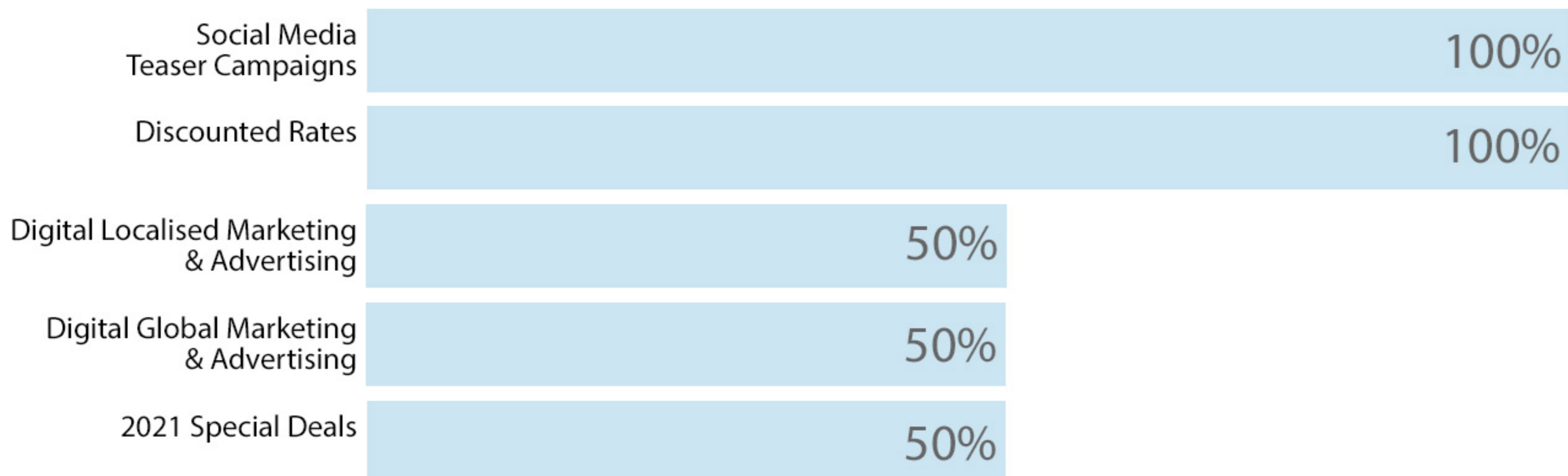
36 Hotel Owners & Managers



9 Travel Agency/OTA's

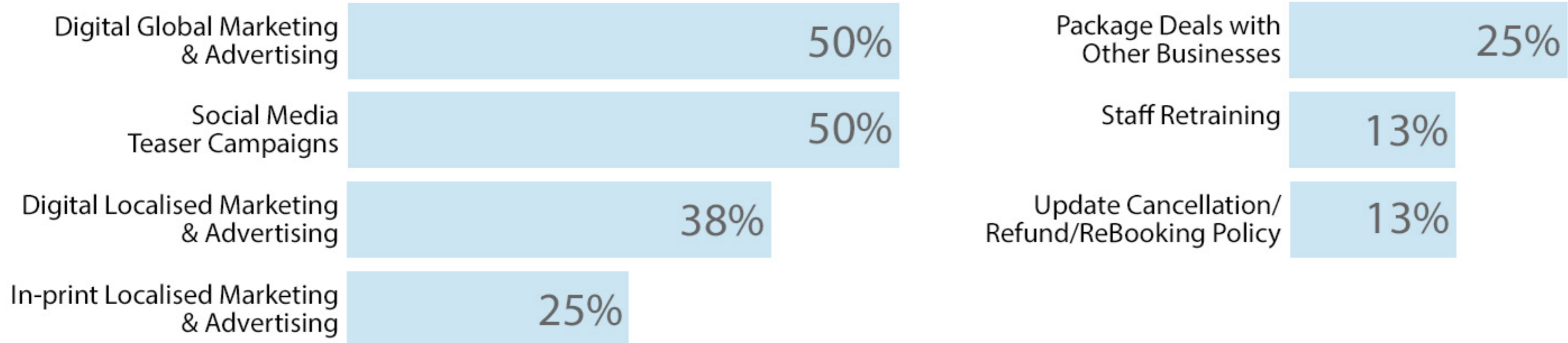


Hotel Supplier/Marketing Software

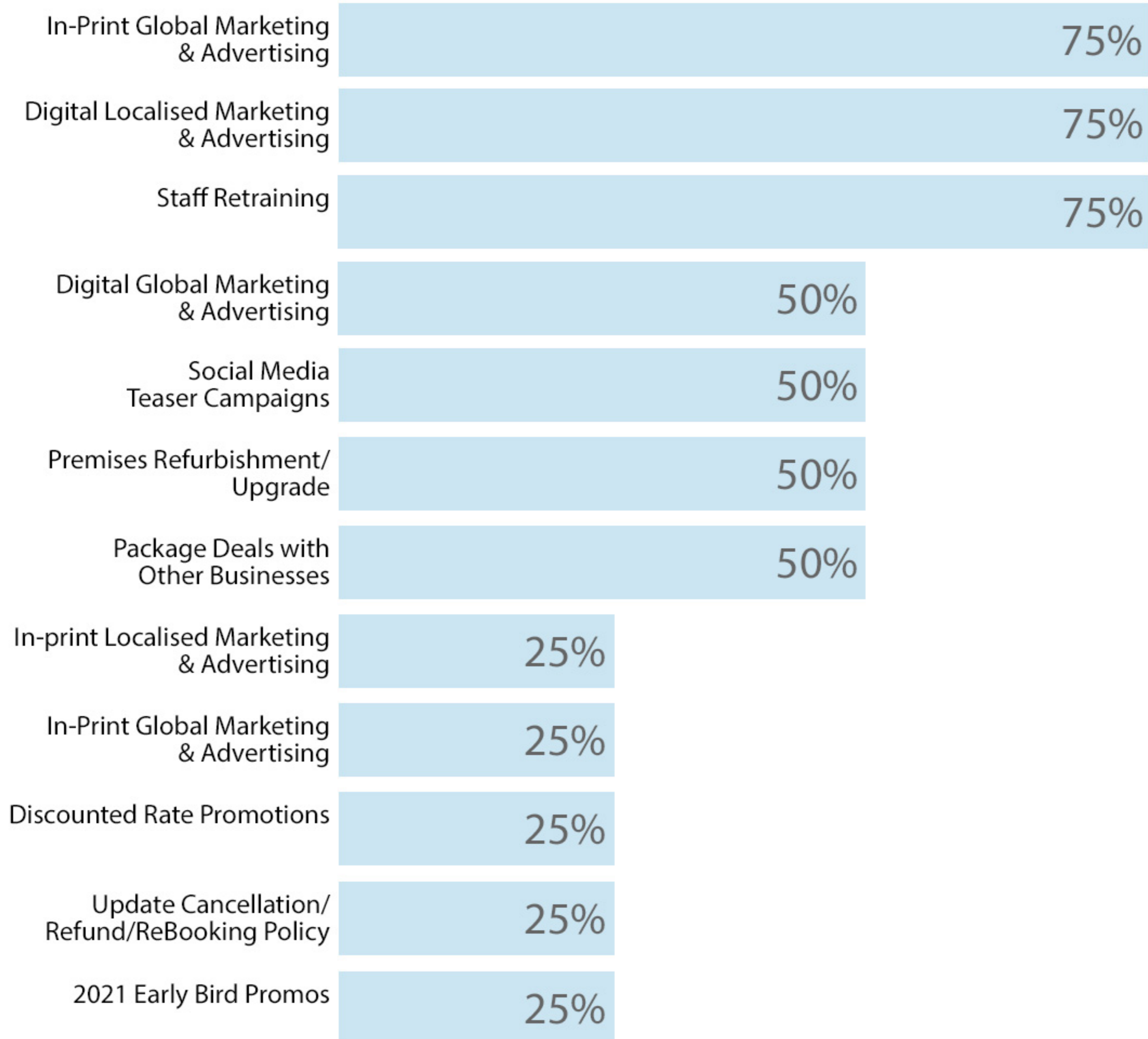




## 8 Restaurant/Bar Owners & Managers



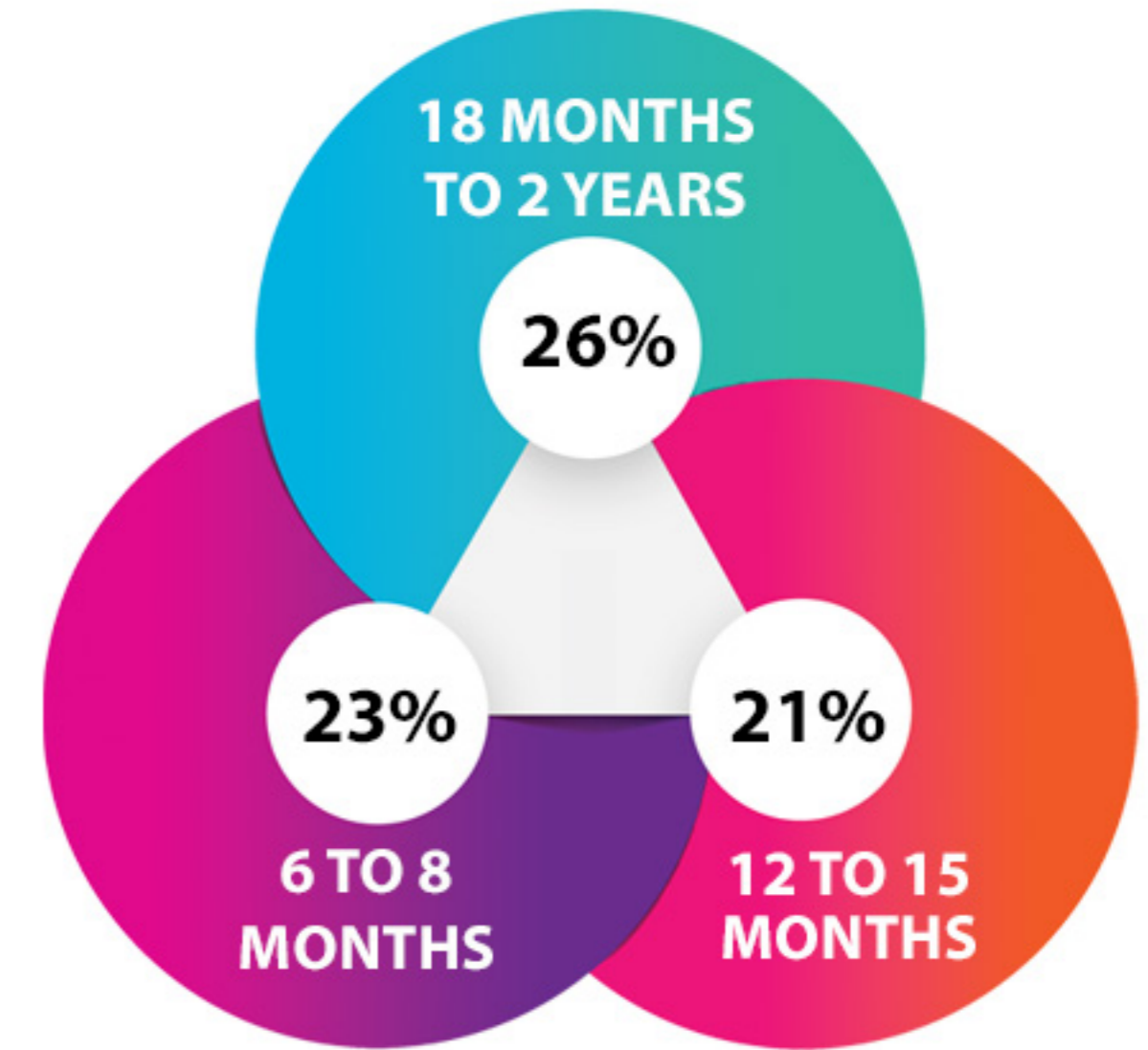
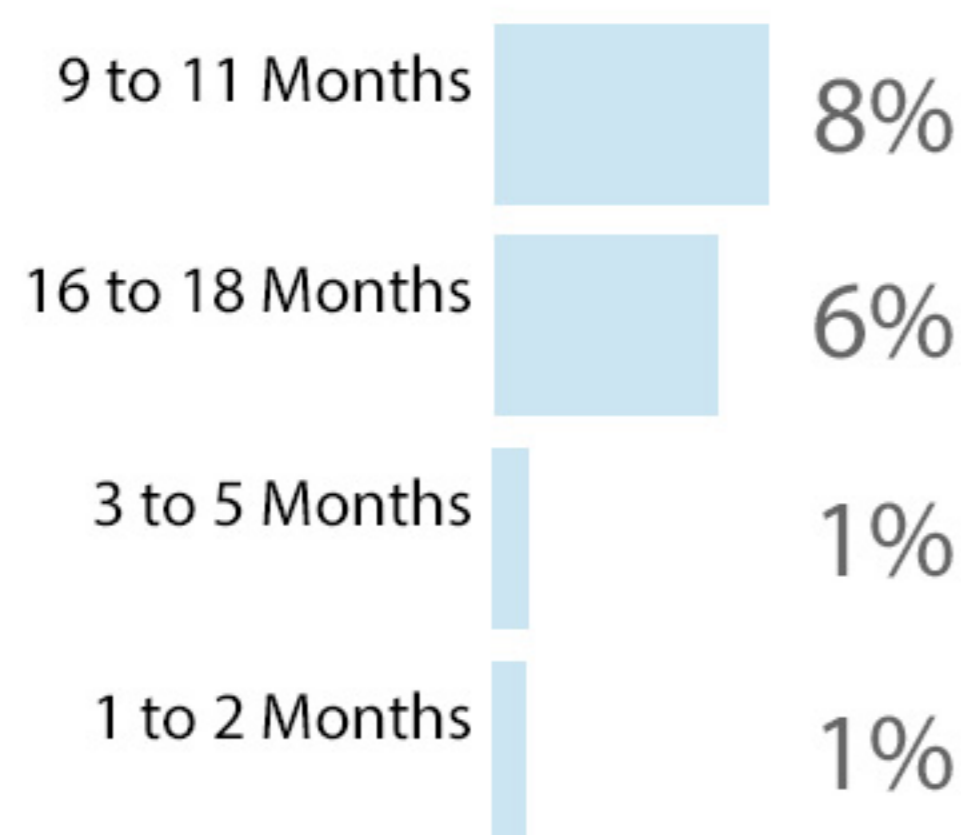
## 3 Tour Operator & 1 Dive Centre



## HOW LONG BEFORE CUSTOMER NUMBERS WILL BE BACK TO PRE-COVID LEVELS - PHILIPPINE HOSPITALITY & TOURISM RECOVERY PROGNOSIS

We asked the Owners and Managers what their thoughts were regarding how quickly or slowly the Hospitality and Tourism Industry would recover.

### How Long Before Customer Numbers Will Be Back To Pre-COVID Levels?



HOW LONG BEFORE CUSTOMER NUMBERS WILL BE BACK TO PRE-COVID LEVELS?

**Only 2 Hotels** were optimistic that their guest numbers would be back up within 1-5 Months; one was a small hotel in Region 7, with 1-25 employees, which has been operating for between 6-12 Months. The other was a large Hotel in NCR, with 51-100 employees, which has been open for more than 15 years.

27% of Hotel Owners and Managers felt it would be 18 Months to 2 Years before their guest numbers were back to pre-COVID levels. 41% felt they would be back to guest number normality within 6 Months to 1 year. 17% felt it would take them 1 Year to 18 Months.

**33% of Restaurant & Bar Owners** felt it would be 6-8 Months; 1 Bar in Region 1, and 2 Restaurants in NCR. 2 Bars in Region 6 (33%) felt it would take 9-15 Months, and 33% felt it would be 16 Months to 2 years; 1 Restaurant in Region 3 and 2 in Region 6.

**60% of Travel Agencies & OTA's** think it will be 12-18 Months before their bookings are back to pre-COVID levels. 20%, however, think it will take 18 Months to 2 years. 20% are optimistic and think their bookings will recover between 6-12 months.

**80% of Tour Operators & Dive Centres** think it will take between 1-2 years for bookings to recover.

The Hotel Supplier expects to recover sales within 9-12 Months, whilst the Marketing Software company and the Retail Shop think it will take 18 Months to 2 years.

Overall, Restaurants and Bars were the most optimistic of a quick recovery, once they were allowed to re-open to tourists and locals.

## HOW WORRIED ARE YOU ABOUT COVID AND ECQ?

58% of the Owners and Manager surveyed said that they were Worried or Really Worried. 13% were Slightly Worried and 9% said they were 'Trying Not To Think About It'. 19% declined to answer.

### Worried or Really Worried



The Spa Owner was Worried, The Marketing Software Owner was Really Worried and the Hotel Supplier and Retail Shop were “trying not to think about it”

21% of Hotel Owners or Managers, 22% of Restaurant or Bar Owner/Managers and 11% of Travel Agency Owner/Managers, were either Not Worried or Slightly Worried.



## WHAT ARE YOUR MAIN CONCERNS?

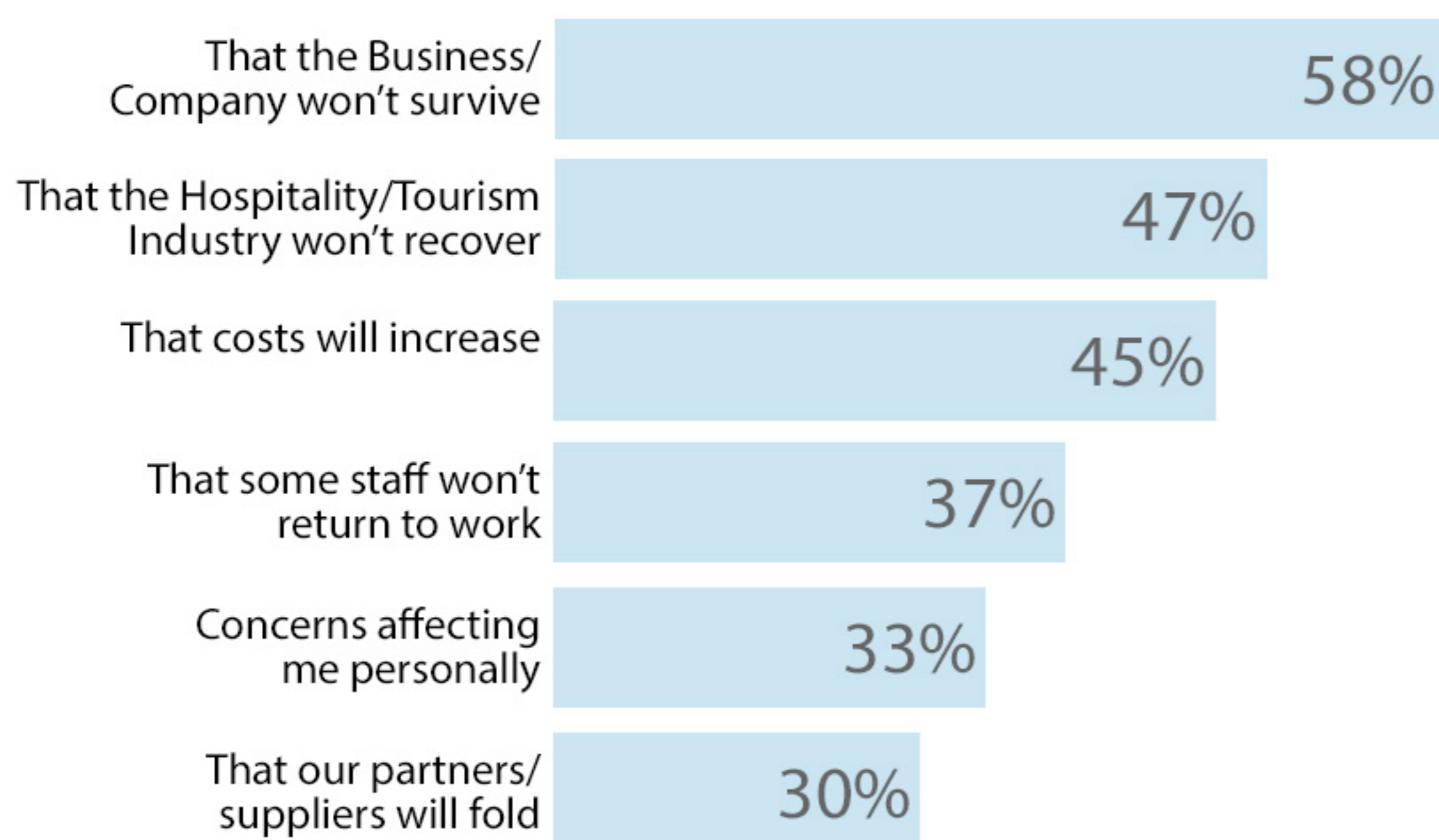
The greatest concern voiced by all was that their business would not survive (58%). The second greatest concern (47%) was that the Hospitality & Tourism Industry won't recover.

Certainly 53% of Owners and Managers believe that it will be 1-2 years before their guest numbers are back to pre-COVID Levels. And 20% are already considering dissolving or selling their business because of the impact of a World-wide stop on travel.

Overall, 37% of Owners and Managers were concerned that their employees wouldn't return to their jobs and this may be a reality when 32% of employees surveyed answered that they don't intend to go back to their job (8%) or were not sure if they would (24%).

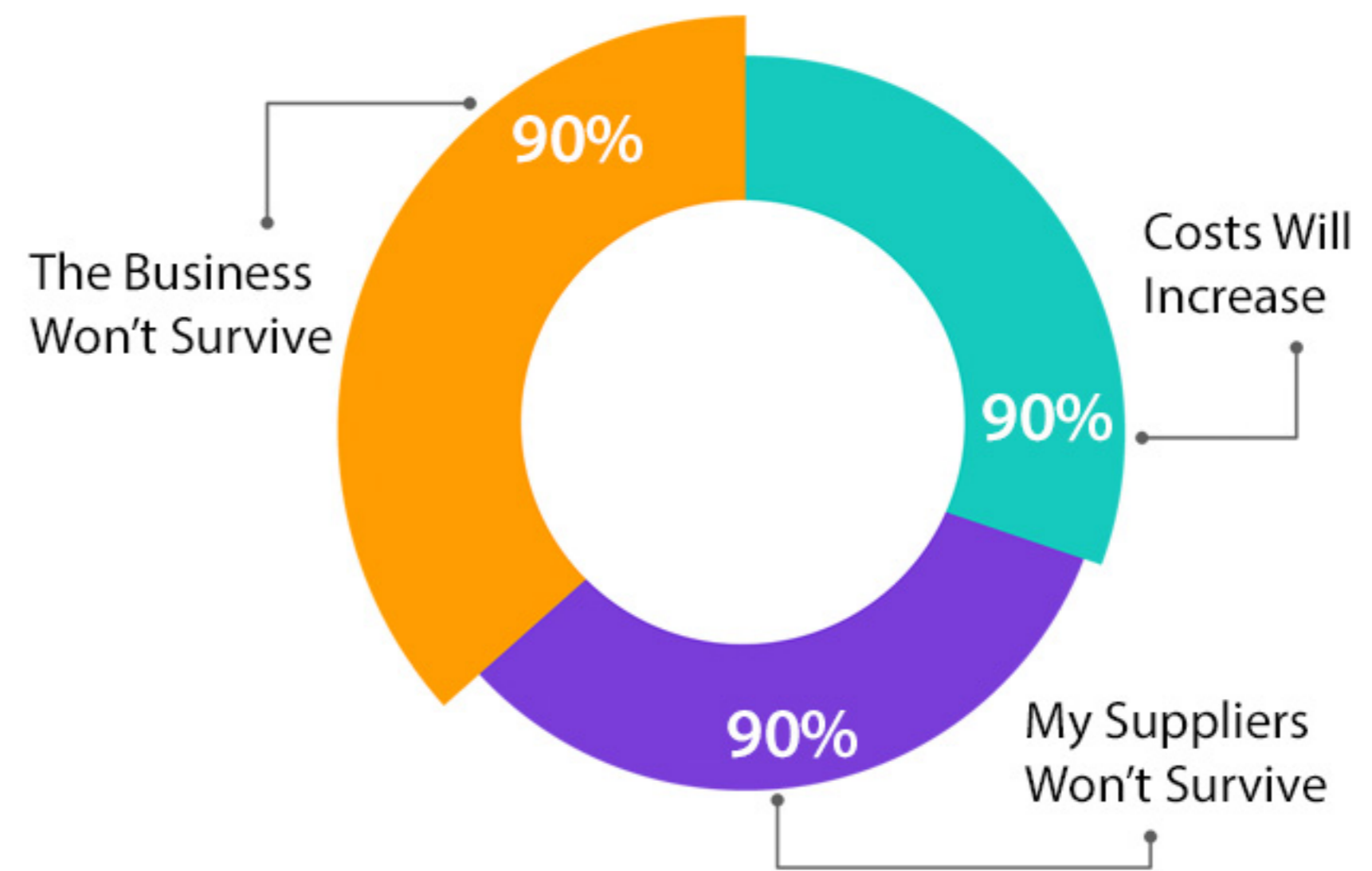
Not everyone was as concerned about the Industry recovering, suggesting either confidence that it would recover or that they feared that their business wouldn't survive to benefit from a recovery. Travel Agencies, including OTA's, Tour Operators, the Spa and Marketing Software company either didn't select this option, or 50% or less did.

### Main Concerns About COVID & ECQ



## Travel Agency Owners

The top 3 concerns of the Travel Agencies ranked equally at 90%; the business won't survive, their suppliers will fold and costs will increase. All, except one Agency, caters to the mid-range spend market. So it isn't surprising that they are concerned their partners may not survive, or that prices may need to increase in order for their partners to survive.

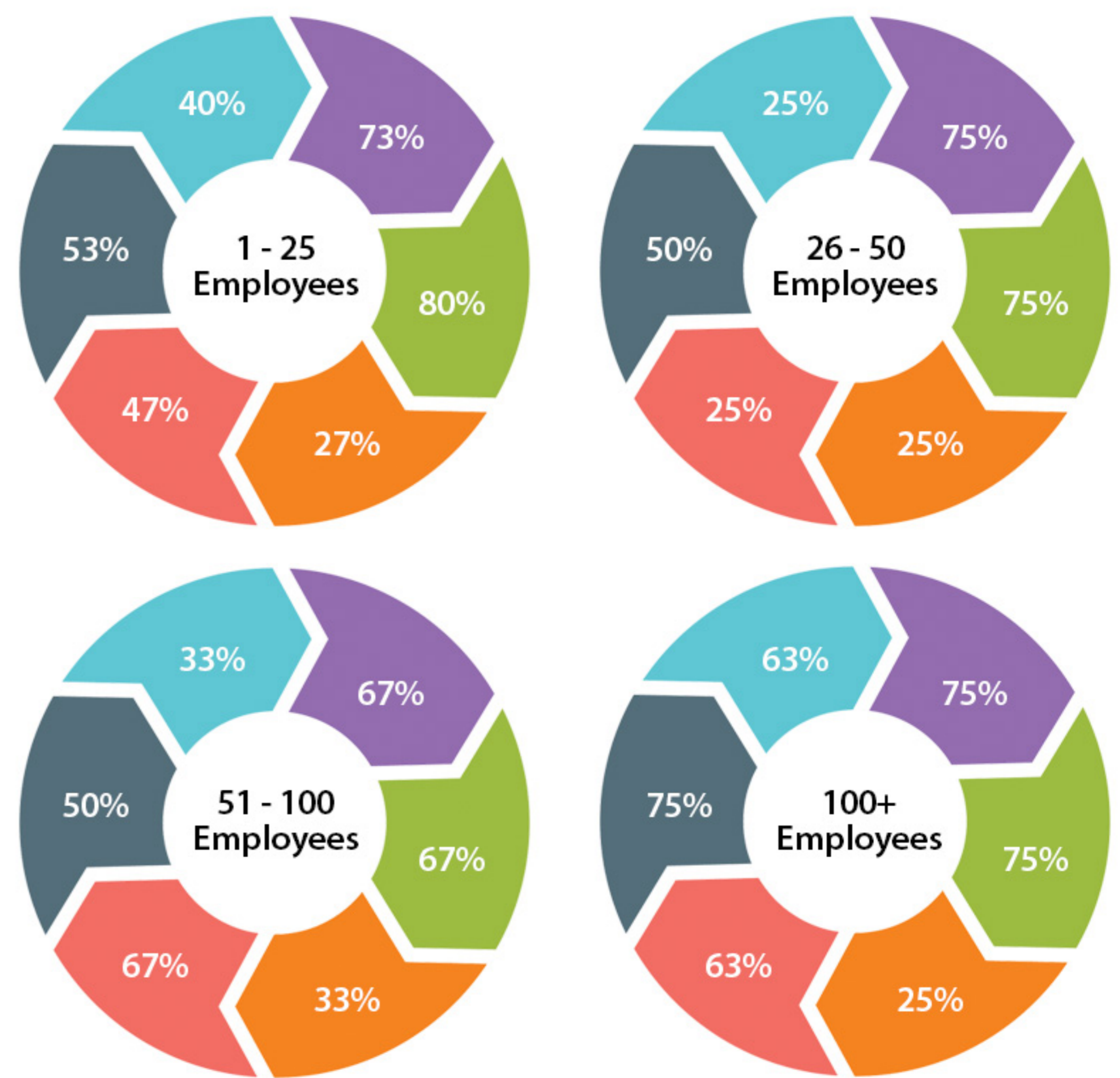


## Hotels

The smallest hotels, with between 1-25 employees, were more concerned about the Tourism Industry recovering than their business surviving, with a 7% margin. These were their two main concerns with significantly fewer being concerned that staff might not return to work or that costs might increase. Their overheads will, of course, be lower than larger hotels and they may well own the property rather than lease it.

The other hotels, that we've grouped together, were as equally concerned about their businesses survival as they were about Industry Recovery. For Hotels with 26-50 employees, their 3rd greatest concern, at 50%, was whether their employees would return to work for them. Hotels with 51-100 employees ranked their concern about costs increasing, equally with their business surviving and the Industry Recovering. Half of them were worried staff wouldn't return to work.

The largest hotels, with more than 100 employees ranked their concern that staff wouldn't return to work equally with the business surviving and concerns about Industry Recovery. Slightly below this was the concern that costs would increase.



## Concerns By Region

The differences in concern levels, when viewed across the 4 most surveyed Regions, may be of interest; Region 4 (7 answered), Region 6 (17 answered) Region 7 (7 answered) NCR (14 answered).

What Are Your Concerns?	Region 4	Region 6	Region 7	NCR
The business won't survive	86%	88%	43%	93%
The tourism industry won't recover	71%	76%	100%	43%
That our suppliers/partners will fold	43%	29%	0%	86%
That costs will increase	86%	76%	29%	79%
That some staff won't return to work	57%	65%	57%	29%

Those surveyed in Region 7 were less concerned about their business surviving and were more worried about the recovery of the Tourism Industry. For the other 3 regions their greatest concern was the survival of their Business.

Region 4 owners were equally concerned that cost may increase, as they were that their Business wouldn't survive, whilst Region 7 had cost increases as their lowest concern. Region 6 was concerned that the Industry wouldn't recover and that costs would increase equally.

Region 6 also showed more concern about losing some of their employees than the other regions. For NCR businesses this was their lowest concern.

### Some people surveyed left additional comments:

**A Region 3 Restaurant**, in operation for 7-9 years with 1-25 employees, ticked every concern option listed and added:



*"We might lose relevance in the industry and eventually lose our customers."*

**A Region 4 Hotel**, open for only 1-3 years with 1-25 employees, was concerned about their "Lease payments".



**A Region 4 Hotel**, open for only 6-12 months with 1-25 employees added:



*"We cannot access our place due to LGU Policy; the practice from NCR is different from Tagaytay, they are very strict. The IATF Guidelines are not implemented in Tagaytay; they have their own policy. Even unit owners cannot access their own unit."*

**A Region 4 Hotel**, operating for 10-14 Years with more than 100 employees added:

*"It will take a long time to recover and we might not stay afloat."*



**A Region 7 Hotel**, in operation for 4-6 years with 1-25 employees said that an added concern was:



*"That Philippine borders will be closed for my target audience; foreign guests."*

**An NCR Hotel**, in operation for 7-9 years with over 100 employees, added:

*"The expenses were piling up without assurance on when can hotels can actually re-open? Including events even for small groups."*



## OBSERVATIONS

There are around 5.7 Million people employed in the Hospitality & Tourism Industries, which contributed almost 13% of the Philippines Gross Domestic Product in 2019.

Almost 70% of Tourism Stakeholders fall within the MSME's (Micro, Small, and Medium Enterprises) category. And 144,535 accommodation, food and service businesses are considered MSME's, according to the Philippines Statistics Authority. This accounts for 99.9% of the Accommodation and Food Services sectors.

100% of the businesses of the Owners, Directors, Partners and Senior Managers who took part in this survey would qualify as an MSME based on the information provided in their answers.

*"MSMEs have a very important role in developing the Philippine economy.  
They help reduce poverty by creating jobs for the country's growing labor force.  
They stimulate economic development in rural and far-flung areas.  
They serve as valuable partners to large enterprises as suppliers and providers of support services. ....  
A vibrant MSME sector is thus an indication of a thriving and growing economy." senate.gov.ph*

Worryingly, 56% of the Owners etc. who took part in the survey stated that they were considering dissolving or selling their business due to COVID-19 & ECQ Impacts. And 47% said they were considering taking out a Bank or Business Loan. Bearing in mind these answers were provided in June/July 2020.

However Senate.gov.ph acknowledges that most MSME's have difficulty accessing funds through banks and government financial institutions because of: (1) insufficient collateral, limited credit histories and banking relationships; (2) inadequate financial records and business plans; and (3) high interest rates (<https://www.senate.gov.ph/publications/AG%202012-03%20-%20MSME.pdf>).

79% of the Hospitality & Tourism employees surveyed said that they were currently on Leave without Pay, No Work No Pay, had been made redundant or were without work and stranded in the destination where they had been employed.

At the time of the survey 13% of Owners had reduced some of their employees to part-time hours, 24% of Owners had put employees on No Work No Pay and 1 Owner had already made staff redundant. In addition, 31% of Businesses advised that they were considering making some of their staff redundant in order for the business to survive in the immediate term, during ECQ.

The survey also shows that Businesses looking to reduce Overheads, once they can re-open to tourists, were planning for reduced operation with Fewer Full-Time Staff (49%), Fewer Part-time Staff (17%), a Hiring Freeze (37%) and Redundancies (15%).

**The World Travel & Tourism Council (WTTC)**, which represents the Travel & Tourism sector globally, urges governments to implement policies that will directly support the sector during this pandemic crisis. They have made three recommendations to protect the industry:

Protect the Livelihoods of Workers: Financial help to be granted to protect the incomes of the millions of workers in severe difficulty.

Fiscal Support: Governments to extend vital, unlimited interest-free loans to small and medium-sized businesses as a stimulus to prevent them from collapse. Government dues and financial demands on the Travel & Tourism sector to be waived with immediate effect for at least the next 12 months.

Injecting Liquidity & Cash: Cash flow assistance to support players big and small of the Travel & Tourism sector is critical as well as to offer targeted support to severely affected industries within the sector.

The Philippines Senate Bill No. 1564, or the Bayanihan to Recover as One Act (referred to as "Bayanihan 2") originally allotted 10 billion for working capital loans for the tourism industry, and approved another P100 million for training and subsidies to tourist groups. In the 2nd week of August concerns were raised by Tourism Stakeholder groups that on the Bill's 2nd Reading the allocation had been earmarked instead for infrastructure projects under the Tourism Infrastructure and Enterprise Zone Authority (TIEZA).

After some focused negotiations and lobbying, by key Tourism Stakeholder Groups, 6 billion has been allocated for loans to tourism MSMEs. This will be administered through the Small Business Guarantee and Finance Corporation of the Department of Trade and Industry, and will be coordinated by the DOT. 3 billion has been allocated for assisting displaced and unemployed tourism workers, administered through the Department of Labor and Employment (DOLE). The remaining 1 billion has been allocated for tourism road infrastructure programs, under the Department of Public Works and Highways.

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Finally, the other factors to consider in all of this, are the knock-on effects of these businesses being closed; the “informal” workers who were employed as a by-product of the tourism industry in their area and the CSR Programs, which many Hospitality & Tourism businesses operate for the benefit of their local communities. Initiatives such as those reflected in MY RANGGO’s first Hospitality Heroes Award program, launched back in March 2020 (<http://www.yourhospitalityheroes.com/>) :

- Local Wanderers Travel Services, which donates a % of their tour sales to funding outreach services and school supplies for local children; they were working to raise funds to build a mini school library in 2020
- Feeding Programs for the children of the Dagat Dagatan community, as supported by Herald Suites Manila
- Feeding Programs for street kids and the homeless organised by the Head Chef of Carnivores Snack Shack
- The DAHON Initiative by Binalot Restaurants; a thriving Community Livelihood Program working with impoverished farmers in Nagcarlan, who supply produce to the restaurants.
- Relief Drive Programs, most recently for victims of the Taal Volcano, by AutoConnect Transport
- El Nido Boutique Art Café’s environmental, community and sustainability programs
- Soul Kitchen, which offers a Free Meal Ticket scheme; every meal purchased comes with a free meal ticket, to be claimed by an El Nido Local
- Chicken Shack (now permanently closed as a result of the economic impacts of ECQ), which supported the Brave Warrior Kids Foundation; 500+ under-privileged children with cancer and Spinal Muscular Atrophy
- Lemoni Cafe, Boracay - supporter of The Friends of The Flying Foxes; an endangered bat species on the island, vital for the island and mainland’s ecology.
- Eco Hotels Philippines, which has community programs in each of their hotel locations.
- Encenada Beach Resort, Puerto Galera working with The Stairway Foundation to hold football clinics for rescued street children from Manila

So much more is at risk when the future of the Hospitality & Tourism Industries are at risk.

## APPENDIX 1. TYPES AND STATUS OF 79 BUSINESSES SURVEYED.

Region	Business Type	Age of Business	Status	Number of Staff
1	Bar	15+ Years	Open	26-50
1	Hotel	15+ Years	Partly Open	26-50
1	Online Travel Agency	1-3 Years	Partly Open	1-25
2	Hotel	15+ Years	Closed	26-50
3	Restaurant	7-9 Years	Partly Open	1-25
3	Hotel	4-6 Years	Partly Open	100+
3	Hotel	15+ Years	Closed	100+
3	Hotel	4-6 Years	Closed	26-50
3	Hotel	15+ Years	Closed	100+
3	Hotel	1-3 Years	Partly Open	26-50
4	Dive Centre	4-6 Years	Closed	1-25
4	Hotel	10-14 Years	Closed	51-100
4	Hotel	6-12 Months	Closed	1-25
4	Hotel	1-3 Years	Closed	1-25
4	Hotel	10-14 Years	Partly Open	100+
4	Hotel	1-3 Years	Closed	51-100
4	Online Travel Agency	6-12 Months	Closed	1-25
4	Tour Operator	1-3 Years	Closed	1-25
4	Traditional Travel Agency	6-12 Months	Closed	1-25
5	Hotel	10-14 Years	Closed	1-25
6	Bar	1-3 Years	Closed	1-25
6	Bar	10-14 Years	Closed	1-25
6	Bar	15+ Years	Closed	1-25
6	Hotel Restaurant & Bar	10-14 Years	Closed	1-25
6	Hotel	4-6 Years	Partly Open	1-25
6	Hotel	10-14 Years	Partly Open	1-25
6	Hotel	1-3 Years	Partly Open	1-25
6	Hotel	4-6 Years	Closed	1-25
6	Hotel	10-14 years	Closed	1-25
6	Hotel	0-5 Months	Closed	1-25
6	Hotel	4-6 Years	Closed	1-25
6	Hotel	15+ Years	Open	51-100
6	Hotel	10-14 Years	Partly Open	51-100
6	Hotel	1-3 Years	Closed	51-100
6	Hotel	4-6 Years	Closed	100+
6	Hotel	15+ Years	Closed	100+
6	Hotel	1-3 Years	Closed	100+
6	Hotel	1-3 Years	Closed	100+
6	Long-Stay Accommodation	1-3 Years	Closed	1-25
6	Restaurant	10-14 Years	Closed	26-50
6	Restaurant	15+ Years	Open	26-50
6	Retail Shop	10-14 Years	Open	1-25
6	Spa	4-6 Years	Closed	1-25
7	Dive Centre	15+ Years	Closed	100+
7	Hotel	6-12 Months	Partly Open	1-25
7	Hotel	7-9 Years	Closed	1-25
7	Hotel	4-6 Years	Closed	1-25
7	Hotel	15+ Years	Closed	1-25
7	Hotel	6-12 Months	Partly Open	1-25
7	Hotel	15+ Years	Partly Open	26-50
7	Hotel	1-3 Years	Partly Open	100+
7	Hotel	15+ Years	Closed	100+
7	Hotel	10-14 Years	Closed	100+
10	Hotel	7-9 Years	Partly Open	1-25
10	Hotel	7-9 Years	Partly Open	1-25
11	Traditional Travel Agency	6-12 Months	Open	1-25
13	Hotel	1-3 Years	Open	1-25
NCR	Hotel Supplier	15+ Years	Partly Open	1-25
NCR	Hotel	1-3 Years	Open	1-25
NCR	Hotel	4-6 Years	Partly Open	1-25
NCR	Hotel	15+ years	Closed	26-50
NCR	Hotel	1-3 Years	Partly Open	51-100
NCR	Hotel	15+ years	Closed	51-100
NCR	Hotel	10-14 Years	Partly Open	51-100
NCR	Hotel	10-14 Years	Partly Open	51-100
NCR	Hotel	7-9 Years	Partly Open	100+
NCR	Online Travel Agency	1-3 Years	Open	1-25
NCR	Online Travel Agency	1-3 Years	Partly Open	1-25
NCR	Restaurant	15+ Years	Partly Open	1-25
NCR	Restaurant	1-3 Years	Partly Open	1-25
NCR	Restaurant	7-9 Years	Closed	26-50
NCR	Marketing Software for Hotels	10-14 Years	Partly Open	1-25
NCR	Tour Operator	4-6 Years	Partly Open	1-25
NCR	Tour Operator	15+ Years	Partly Open	26-50
NCR	Traditional Travel Agency & OTA	15+ Years	Closed	100+
NCR	Travel Agency	1-3 Years	Closed	1-25
NCR	Travel Agency	1-3 Years	Closed	1-25
NCR	Travel Agency	10-14 Years	Closed	1-25
OFW	Hotel	1-3 Years	Closed	100+



## APPENDIX 2: WHAT ARE YOU CONSIDERING IN ORDER TO MANAGE YOUR BUSINESS DURING CLOSURE?

### Owners/Managing Partner/CEO/Director

Region	Type	Status	Age of Business	Number of Staff	Bank/Business Loan	Dissolving Business	Staff Redundancies	Selling Business
1	Hotel	Owner	15+ years	26-50			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1	OTA	Owner	1-3 years	1-25	<input checked="" type="checkbox"/>			
3	Restaurant	Owner	7-9 years	1-25	<input checked="" type="checkbox"/>			
4	Hotel	Owner	6-12 months	1-25		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
4	Hotel	Owner	1-3 years	1-25		<input checked="" type="checkbox"/>		
4	OTA	Owner	6-12 months	1-25		<input checked="" type="checkbox"/>		
6	Hotel Restaurant & Bar	Owner	10-14 years	1-25	<input checked="" type="checkbox"/>			
6	Bar	Owner	1-3 years	1-25				<input checked="" type="checkbox"/>
6	Bar	Owner	15+ years	1-25	<input checked="" type="checkbox"/>			
6	Hotel	Owner	4-6 years	1-25		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
6	Hotel	Owner	0-5 months	1-25				<input checked="" type="checkbox"/>
6	Hotel	Owner	4-6 years	1-25	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
6	Hotel	Owner	10-14 years	1-25	<input checked="" type="checkbox"/>			
6	Hotel	Managing Partner	10-14 years	1-25	<input checked="" type="checkbox"/>			
6	Hotel	Owner	1-3 years	1-25	<input checked="" type="checkbox"/>			
6	Hotel	Owner	4-6 years	1-25				<input checked="" type="checkbox"/>
6	Spa	Owner	4-6 years	1-25	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
6	Hotel	Director	15+ years	100+			<input checked="" type="checkbox"/>	
7	Hotel	Director	10-14 years	100+			<input checked="" type="checkbox"/>	
7	Hotel	Owner	6-12 months	1-25	<input checked="" type="checkbox"/>			
7	Hotel	Owner	4-6 years	1-25				<input checked="" type="checkbox"/>
7	Hotel	Owner	15+ years	26-50		<input checked="" type="checkbox"/>		
11	Travel Agency	Owner	6-12 months	1-25	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
NCR	Long-Stay Accom	Owner	1-3 years	1-25		<input checked="" type="checkbox"/>		
NCR	OTA	Owner	1-3 years	1-25			<input checked="" type="checkbox"/>	
NCR	Marketing Software	Owner	10-14 years	1-25	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
NCR	Travel Agent & OTA	Owner	15+ years	100+	<input checked="" type="checkbox"/>			
NCR	Travel Agency	Owner	1-3 years	1-25			<input checked="" type="checkbox"/>	
NCR	Travel Agency	Owner	1-3 years	1-25		<input checked="" type="checkbox"/>		
NCR	Travel Agency	Owner	10-14 years	1-25		<input checked="" type="checkbox"/>		
NCR	Hotel	CEO	10-14 years	51-100	<input checked="" type="checkbox"/>			
NCR	Tour Operator	Director	15+ years	26-50	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	

## APPENDIX 2: WHAT ARE YOU CONSIDERING IN ORDER TO MANAGE YOUR BUSINESS DURING CLOSURE?

### Senior Managers

Region	Type	Status	Age of Business	Number of Staff	Bank/Business Loan	Dissolving Business	Staff Redundancies	Selling Business
3	Hotel	Manager	15+ years	100+			<input checked="" type="checkbox"/>	
3	Hotel	Team Leader	4-6 years	26-50			<input checked="" type="checkbox"/>	
3	Hotel	Manager	15+ years	100+		<input checked="" type="checkbox"/>		
4	Hotel	Manager	10-14 years	51-100			<input checked="" type="checkbox"/>	
4	Hotel	Manager	10-14 years	100+			<input checked="" type="checkbox"/>	
4	Hotel	Manager	1-3 years	51-100			<input checked="" type="checkbox"/>	
4	Travel Agent	Manager	6-12 months	1-25	<input checked="" type="checkbox"/>			
5	Hotel	Manager	0-5 months	1-25			<input checked="" type="checkbox"/>	
6	Bar	Manager	10-14 years	1-25	<input checked="" type="checkbox"/>			
6	Hotel	Manager	1-3 years	100+	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
6	Hotel	Manager	15+ years	51-100				<input checked="" type="checkbox"/>
6	Hotel	Manager	1-3 years	100+			<input checked="" type="checkbox"/>	
6	Hotel	Manager	4-6 years	100+	<input checked="" type="checkbox"/>			
6	Restaurant	Manager	10-14 years	26-50		<input checked="" type="checkbox"/>		
6	Retail	General Manager	10-14 years	1-25	<input checked="" type="checkbox"/>			
7	Dive Centre	Manager	15+ years	100+	<input checked="" type="checkbox"/>			
7	Hotel	Manager	1-3 years	100+			<input checked="" type="checkbox"/>	
7	Hotel	Senior Manager	6-12 months	1-25			<input checked="" type="checkbox"/>	
7	Hotel	Manager	15+ years	100+			<input checked="" type="checkbox"/>	
10	Hotel	Manager	7-9 years	1-25	<input checked="" type="checkbox"/>			
NCR	Hotel Supplier	Manager	15+ years	1-25			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
NCR	Hotel	Manager	7-9 years	100+			<input checked="" type="checkbox"/>	
NCR	Hotel	Manager	15+ years	51-100			<input checked="" type="checkbox"/>	
NCR	Restaurant	Manager	7-9 years	26-50			<input checked="" type="checkbox"/>	
NCR	Tour Operator	Manager	4-6 years	1-25	<input checked="" type="checkbox"/>			
OFW	Hotel	Manager	1-3 years	100+	<input checked="" type="checkbox"/>			