Establishment Survey in the Hotel Sector in Honduras

Preliminary Results

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IMPAQ INTERNATIONAL

Establishment Survey in the Hotel Sector in Honduras
Summary Report
Honduras

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Project

Labor Market Supply and Demand in the Northern Triangle: Leveraging Data to Build and Efficient labor Market

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Recognitions

We would like to thank Trevor Hayes, Adam Taube, and Paula Mian from the IMPAQ International team, for their support in developing this report.

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Disclaimer: This material does not necessarily reflect the views or policies of the United States Department of Labor, nor does mention of trade names, commercial products, or organizations imply endorsement by the United States government. One hundred percent of the costs of the project in the three countries of El Salvador, Guatemala, and Honduras have been financed with federal funds, for a total of $4,435,000 US Dollars.

Introduction

IMPAQ International is implementing the project *Labor Market Supply and Demand in the Northern Triangle: Leveraging Data to Build an Efficient Labor Market*, funded by the US Department of Labor Bureau of International Labor Affairs. The objective of this project is to provide technical assistance to El Salvador, Guatemala, and Honduras (the Northern Triangle countries) to improve labor market efficiency and performance by assisting all three countries to develop labor market information (LMI) systems that publish reliable, comprehensive, and current LMI in user-friendly formats. It also seeks to create local capacities in the use of LMI. One of the main components of this project is to facilitate the creation of a pilot establishment survey that captures labor demand data in a high-growth economic sector.

In collaboration with the *Consejo Hondureño de la Empresa Privada* (COHEP) and the *Cámara Nacional de Turismo de Honduras* (CANATURH), the IMPAQ team carried out a pilot establishment survey between October and December 2019 in the tourism sector, specifically with hotel establishments.

What is an Establishment Survey?

An establishment survey collects data to generate and disseminate LMI related to employment characteristics that are in demand in a country's private sector.

The IMPAQ team used standardized methodologies and international best practices to collect information to:

- Characterize the labor demand of the primary positions in the chosen sector (for example, educational training, requirements, and competencies).
- Determine the number of current vacancies and hires, as well as future demand for jobs in the private sector.
- Identify the current and medium-term training needs of the chosen sector.

Implementation of the Establishment Survey in the Hotel Sector in Honduras

Geographic Reach

The IMPAQ team implemented the survey in nine high-tourism departments in Honduras: Francisco Morazán, Colón, Cortés, Copán, Atlántida, Islas de la Bahía, Comayagua, Intibucá, and Lempira. Exhibit 1 shows the geographic distribution of the surveyed establishments.

Exhibit 1. Geographic Reach of the Establishment Survey
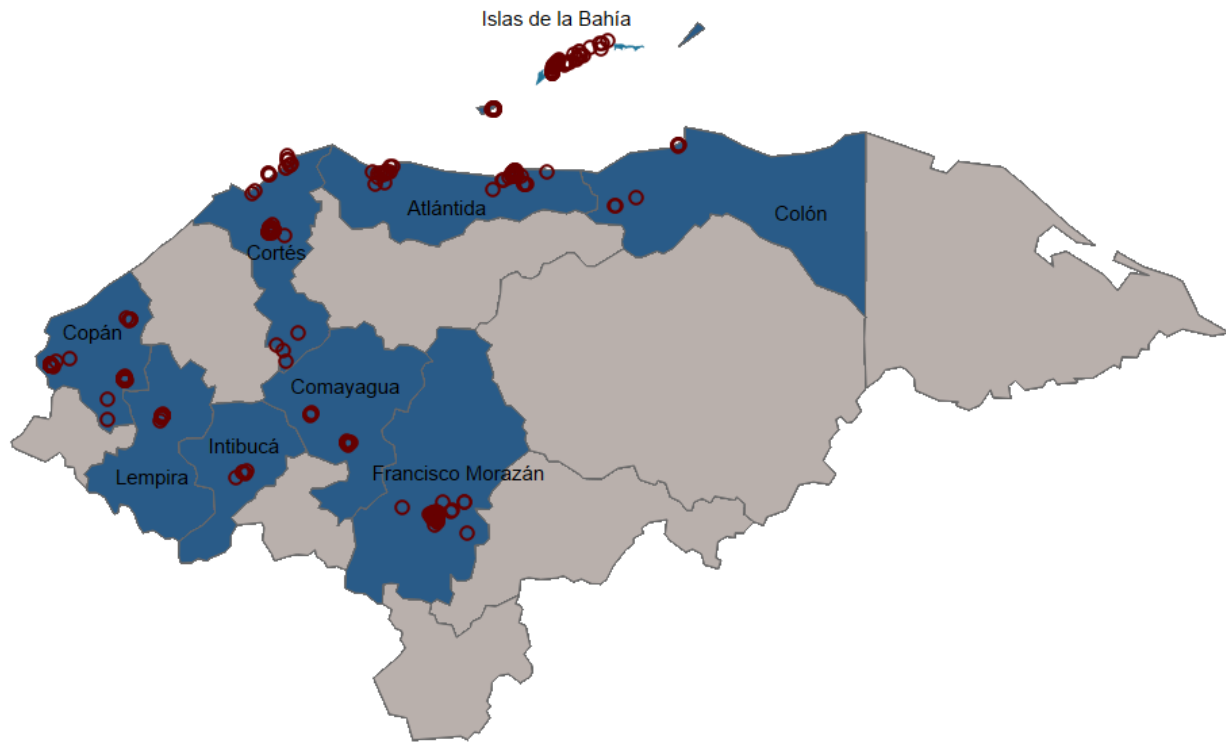
Coverage by Size

In very small establishments, workers usually carry out a wide variety of tasks that correspond to more than one job position. This makes it difficult to classify them. For this reason, during the survey and data cleaning phase, the IMPAQ team decided to exclude establishments with fewer than two workers.

Unit of Analysis and Key Informants

The unit of analysis is the hotel establishment, compensated employees, and job positions (filled and vacant). In the majority of cases, the informant was the establishment's owner, manager, administrator, or human resources manager.

Design and Sample Selection

The IMPAQ team constructed the sampling frame for the survey using the *Registro Nacional de Turismo* (RNT) and the *Directorio de Establecimientos Turísticos* (DET). Both business registries organize lodging venues in Honduras according to name, location, and contact information. One hundred percent of active hotels in the RNT were included. Subsequently, using the DET list, the IMPAQ team included hotels that met the following requirements:

- Located in the nine selected departments
- Have more than 10 rooms

The sample consists of 774 hotels across nine departments in Honduras.

Survey Implementation

The team implemented the survey over a period of eight weeks, between October and December 2019. The data collection team collected data using the SurveyCTO mobile application, during face-to-face interviews. The response rate was 65 percent – 448 hotels completed the survey.[1]

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[1] After data cleaning, we arrived at a final dataset comprised of 437 Honduran hotel establishments. To calculate the response rate, we divided the number of complete surveys by the number of establishments in the sample that were eligible to participate in the study.

Preliminary Results

In this section, we present general information about the investigated establishments, as well as demographic data about their workers. We also analyze the characteristics of the key positions in the hotel industry, their educational requirements, vacancies, and future demand for staff.

We display the results by room rate (high-rate, medium-rate, and low-rate)[2] and/or by department. In the annexes, we break down the results by number of rooms, following the ranges established by the Honduran Institute of Tourism. The reader should note that the results of this survey depict the characteristics of the job positions, not of the workers who occupy these positions.

Exhibit 2. Distribution of Hotels, by Rate

Low-Rate ($50 or less)	270
Medium-Rate ($51-$101)	108
High-Rate ($101 or more)	59
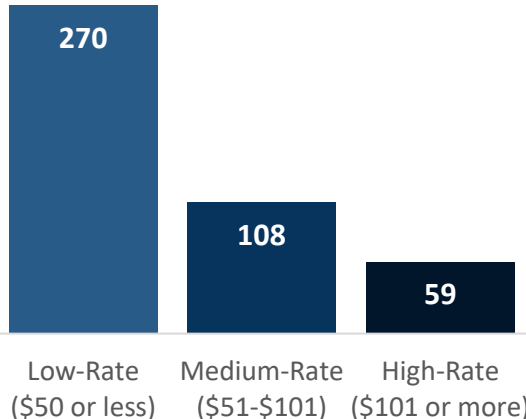
Estimates of the Number of Establishments

In total, we use 437 Honduran hotel establishments for this analysis. Sixty-two percent of survey respondents are low-rate hotels, 25 percent are medium-rate hotels, and 14 percent are high-rate hotels (Exhibit 2). As shown in Exhibit 3, most establishments are concentrated in the department of Cortés, followed by Atlántida and Islas de la Bahía.

Exhibit 3. Distribution of Hotels, by Department

All Hotels   High-Rate   Medium-Rate   Low-Rate

Department	All Hotels	High-Rate	Medium-Rate	Low-Rate
Intibuca	6	0	2	4
Colón	18	2	2	14
Comayagua	20	0	1	19
Lempira	22	0	3	19
Francisco Morazán	58	4	10	44
Copán	65	3	14	48
Islas de la Bahía	72	28	30	14
Atlántida	77	14	16	47
Cortés	99	8	30	61

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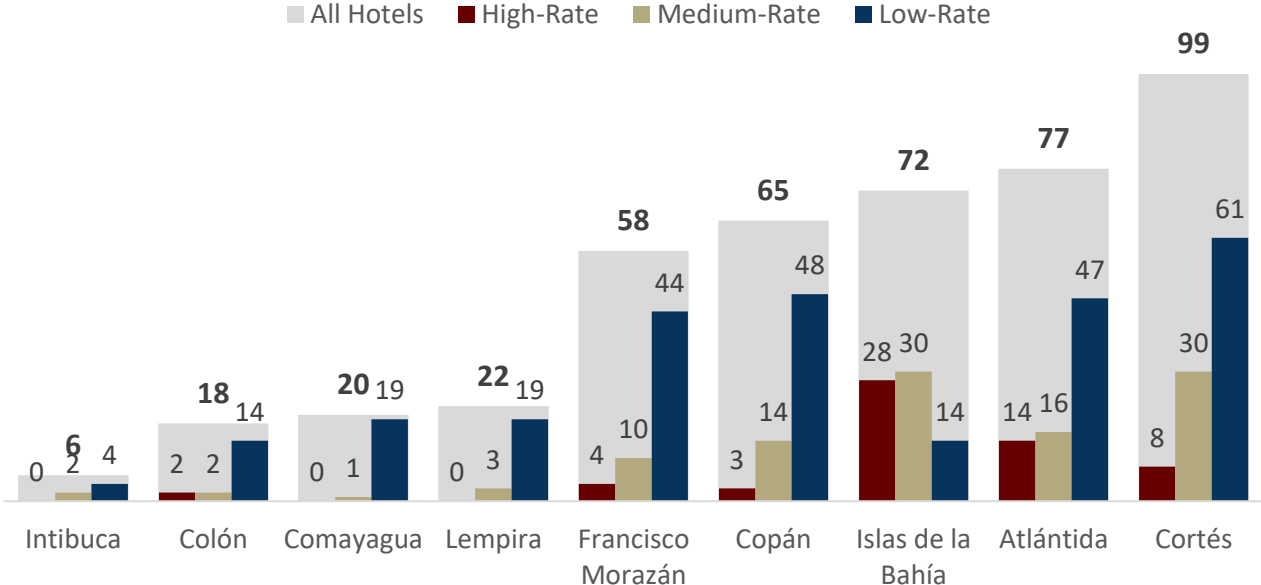
[2] To facilitate the comparability of survey results with those in Guatemala and El Salvador, IMPAQ created the classification by room rate based on the ranges established by the Guatemalan Institute of Tourism (INGUAT). The high-rate tier includes hotels costing the equivalent of $100 or more per night, the mid-rate tier $51-100, and the low-rate tier $50 or less.

General Findings about Workers

The establishments included in the analysis reported 6,678 workers at the time of the survey. High-rate hotels reported 3,383 workers, equivalent to an average of 57 employees per establishment. Medium-rate hotels reported an average of 15 workers, while low-rate hotels reported an average of 6 (Exhibit 4).

On average, female workers represent 53 percent of personnel employed in the hotels (Exhibit 5). Low-rate hotels reported the highest level of female labor participation (59 percent), followed by medium-rate hotels (57 percent). High-rate hotels have the lowest level of female participation (47 percent).

Exhibit 4. Employment in Surveyed Establishments, by Hotel Rate
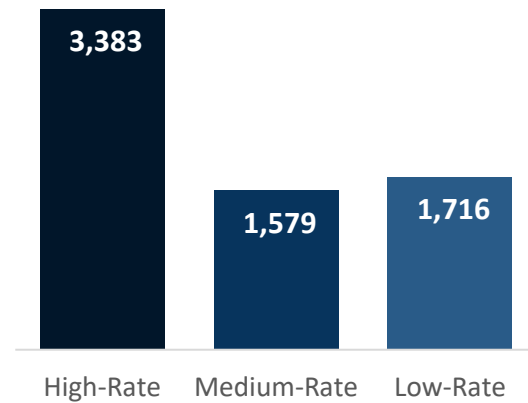
Exhibit 5. Female Labor Participation in Hotels, by Rate

All Hotels	53%
High-Rate	47%
Medium-Rate	57%
Low-Rate	59%
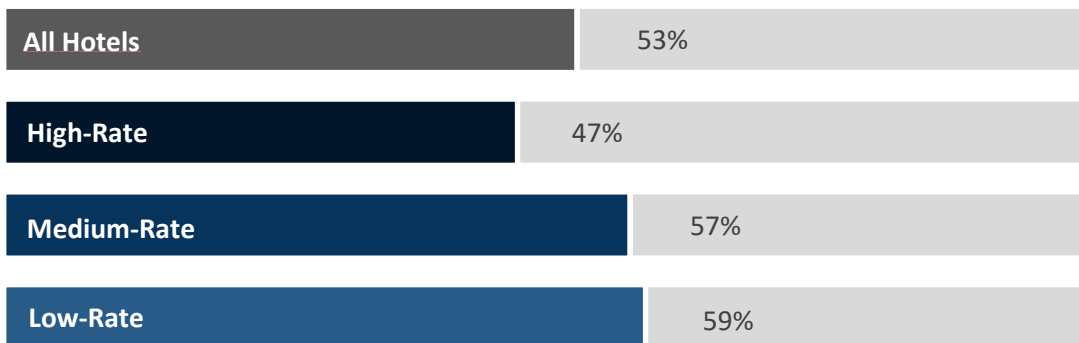
Regarding the age distribution of the hotel personnel, the most highly represented age group is 21 to 40 years (74 percent). Another 21.4 percent of employees are older than 41, while only 4 percent of employees are younger than 20 (Exhibit 6).

Key Positions in the Hotel Industry

In this section, we present the characteristics of key positions in the hotel industry. To carry out this analysis, the IMPAQ team consulted experts in the tourism sector about the most important job positions in the hotel industry and the positions with the highest recruitment volume. Through these consultations, IMPAQ narrowed a broad list of hotel sector positions to 16 key ones. Then, the IMPAQ team asked respondents to choose up to six positions that they consider to be the most common, that is, with a greater volume of recruitment.[3] We present the results both in general and for the top four or five most common positions.

Exhibit 6. Worker Age Distribution

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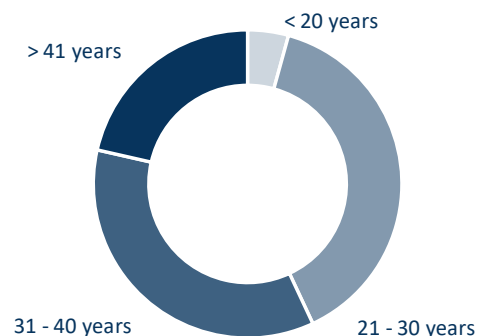
[3] Low-rate hotels selected up to three positions per establishment, and in some cases, reported only two jobs. The 16 key positions on the list were: cook, kitchen assistant, waiter, housekeepers, receptionist, cleaning staff, laundry staff, housekeeping

Most Common Positions

Exhibit 7 shows the job positions with the highest volume of recruitment and the number of personnel employed in each. Receptionist was the most commonly reported position, with 58 percent of establishments mentioning it as a high-volume position. Housekeeper was the second most commonly reported (47 percent), followed by hotel cleaning staff (32 percent).[4] Hotels indicated that they had 722 people employed as housekeepers, 702 people as receptionists, 640 as waiters, and 560 as cooks.
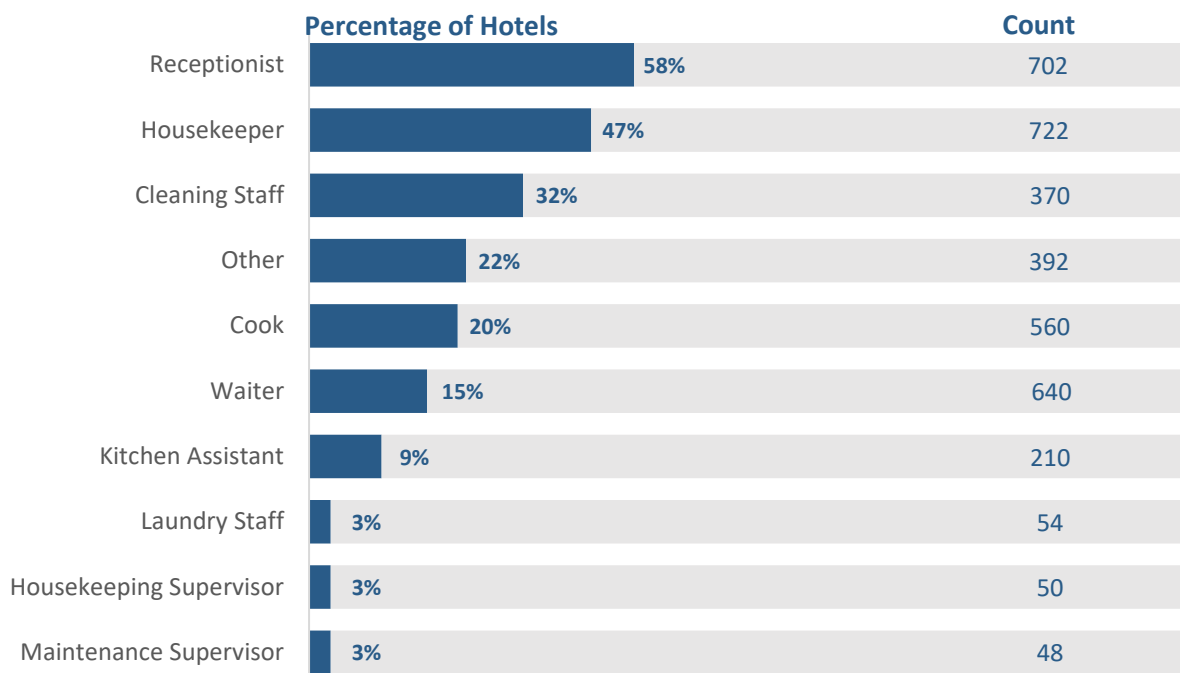
Exhibit 7. Job Positions, by Recruitment and Employment Level

	Percentage of Hotels	Count
Receptionist	58%	702
Housekeeper	47%	722
Cleaning Staff	32%	370
Other	22%	392
Cook	20%	560
Waiter	15%	640
Kitchen Assistant	9%	210
Laundry Staff	3%	54
Housekeeping Supervisor	3%	50
Maintenance Supervisor	3%	48

Number of Workers by Season

The survey asked respondents about average seasonal demand for different job positions. When comparing the high and low seasons, demand for waiters increased more than any other position: from an average of 9.6 per hotel in the low season to 16.3 per hotel in the high season, or a 70 percent rise. Demand for cleaning staff increased by 38 percent, from 2.7 workers during low season to 3.7 workers average during high season. Demand for housekeepers increased by 34 percent, and demand for cooks increased by 29 percent. In contrast, the demand for receptionists increased only 10 percent (Exhibit 8). It is important to note that the data collection team obtained this information during the low season.

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supervisor, maintenance supervisor, purchasing manager, concierge, bellboy, accounting assistant, office assistant, computer specialist, and other.

[4] While the positions of housekeeper, cleaning staff, and housekeeping supervisor have similar functions, there are some key differences in their responsibilities: housekeepers are in charge of cleaning and organizing hotel rooms, cleaning staff mainly clean hallways and common areas, and housekeeping supervisors supervise the work of the two aforementioned positions.

Exhibit 8. Average Number of Workers in Hotels, by Season and Job Position

Position	Low Season	High Season	Percent Increase
Housekeeper	3.5	4.7	34%
Receptionist	2.8	3.1	10%
Cleaning Staff	2.7	3.7	38%
Cook	6.4	8.2	29%
Waiter	9.6	16.3	70%

● Low Season   ● High Season
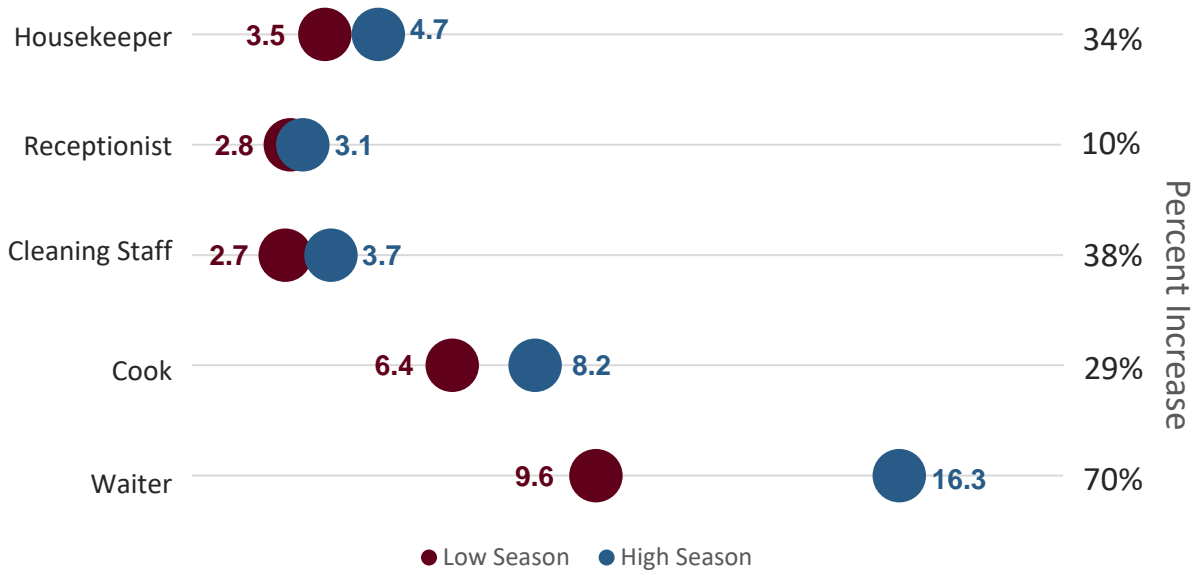
Hotel Sector Remuneration

Exhibit 9 shows the Honduran hotel sector's monthly average remuneration rates among the analyzed job positions, disaggregated by rate type. Nearly 50 percent of high-rate hotels offered an average salary between 10,000 and 14,999 Honduran lempiras (1 lempira = US $0.04), while only 14 percent of low-rate hotels offered the same average range. Nearly half of the medium-rate hotels offered average remuneration between 8,000 and 9,999 lempiras, while 85 percent of low-rate hotels offer less than 10,000 lempiras. It is important to note that each salary range includes base salary, overtime, benefits, in-kind remuneration, and other types of remuneration.

Exhibit 9. Monthly Salary Range, by Rate Type

■ High-Rate   ■ Medium-Rate   ■ Low-Rate

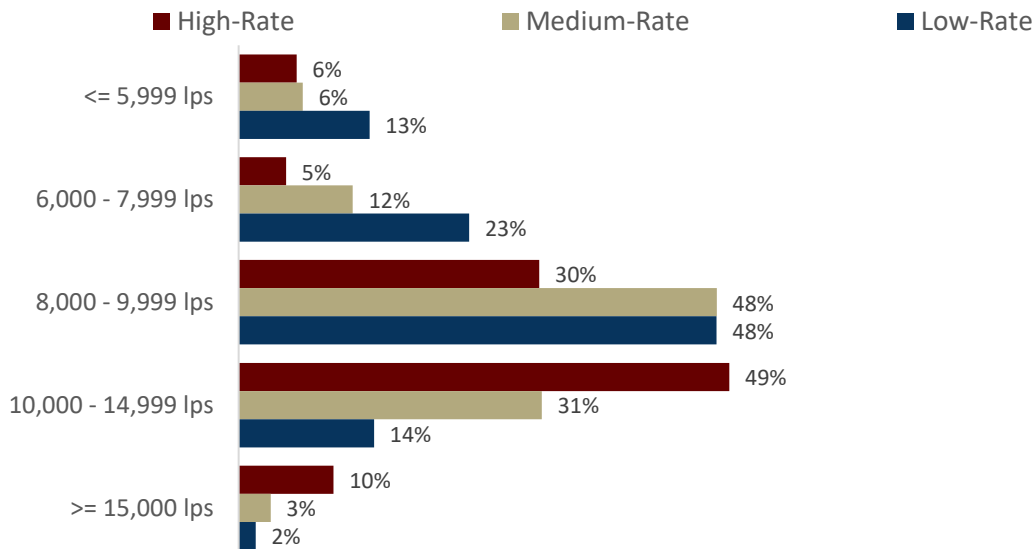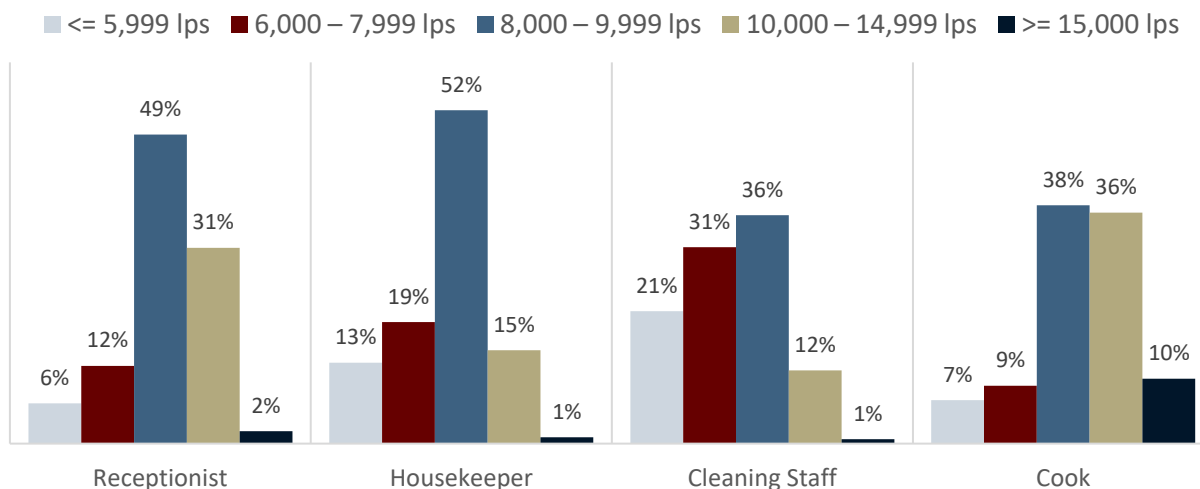| Salary Range	High-Rate	Medium-Rate	Low-Rate
<= 5,999 lps	6%	6%	13%
6,000 - 7,999 lps	5%	12%	23%
8,000 - 9,999 lps	30%	48%	48%
10,000 - 14,999 lps	49%	31%	14%
>= 15,000 lps	10%	3%	2%

Exhibit 10 shows average salaries offered for the four most frequently mentioned positions. Nearly half of the hotels reported a salary between 8,000 and 9,999 lempiras for receptionists and housekeepers (49

percent and 52 percent, respectively). For cooks, 47 percent of hotels offered a salary greater than 10,000 lempiras. Fifty percent of hotels offered their cleaning staff less than the minimum wage.

Exhibit 10. Monthly Salary Range, by Position

Legend: ■ <= 5,999 lps ■ 6,000 – 7,999 lps ■ 8,000 – 9,999 lps ■ 10,000 – 14,999 lps ■ >= 15,000 lps

Position	<= 5,999 lps	6,000 – 7,999 lps	8,000 – 9,999 lps	10,000 – 14,999 lps	>= 15,000 lps
Receptionist	6%	12%	49%	31%	2%
Housekeeper	13%	19%	52%	15%	1%
Cleaning Staff	21%	31%	36%	12%	1%
Cook	7%	9%	38%	36%	10%

Academic Training, Competencies, and other Requirements

Exhibit 11 shows the average educational requirements for hotel employment in the job positions with the highest volume of recruitment. The majority of hotels require at least a primary education for the positions included in the analysis. High-rate hotels require more education, with 20 percent requiring that their average employee have a technical degree and four percent requiring a university degree. Forty-nine percent of medium-rate hotels require at least a secondary education. Low-rate hotels require less education: 14.7 percent do not require any education, and 4.1 percent require a technical degree.

Exhibit 11. Minimum Required Academic Training, by Rate Type

Legend: ■ High-Rate ■ Medium-Rate ■ Low-Rate

	High-Rate	Medium-Rate	Low-Rate
No School	11%	10%	15%
Primary	20%	18%	32%
Secondary	45%	49%	45%
Technical School	20%	14%	4%
University	4%	9%	4%
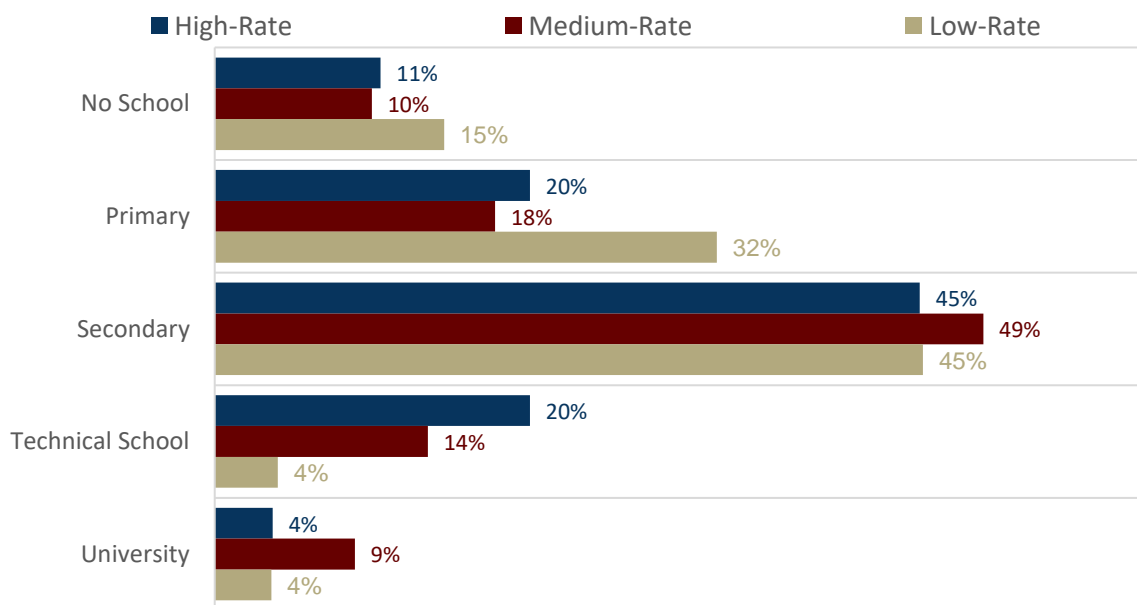
When analyzing the academic training required for the four most common positions, we observe that, on average, receptionists require more education than other positions: 70 percent of establishments require

secondary education, 8 percent a technical degree, and 15 percent a university degree. In contrast, 23 percent of cleaning staff do not require schooling and only 24 percent require secondary education.

Exhibit 12. Minimum Required Academic Training, by Position
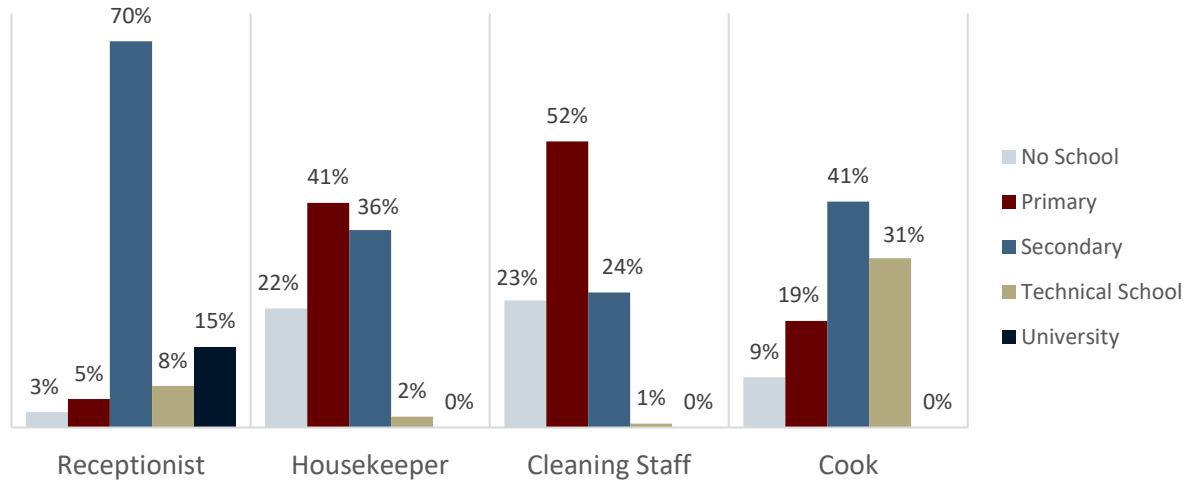
IMPAQ asked respondents to report on the most important skills for employees in different job positions. For housekeepers, cooks, and waiters, the most important skill was being proactive and able to work under pressure. The most important reported skill for receptionists was effective and clear written and spoken communication, while for cleaning staff it was attention to detail. Other frequently mentioned skills were teamwork and problem solving (Exhibit 13).

Exhibit 13. Required Skills in Order of Importance, by Job Position

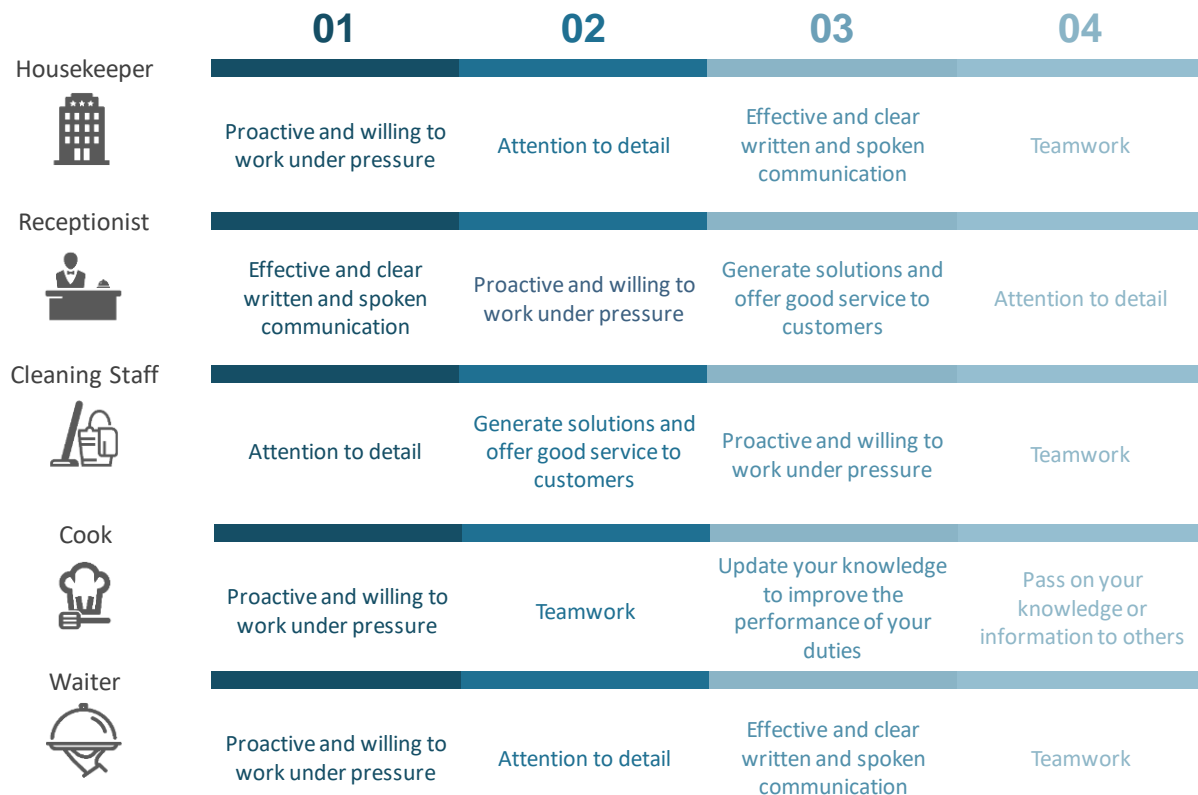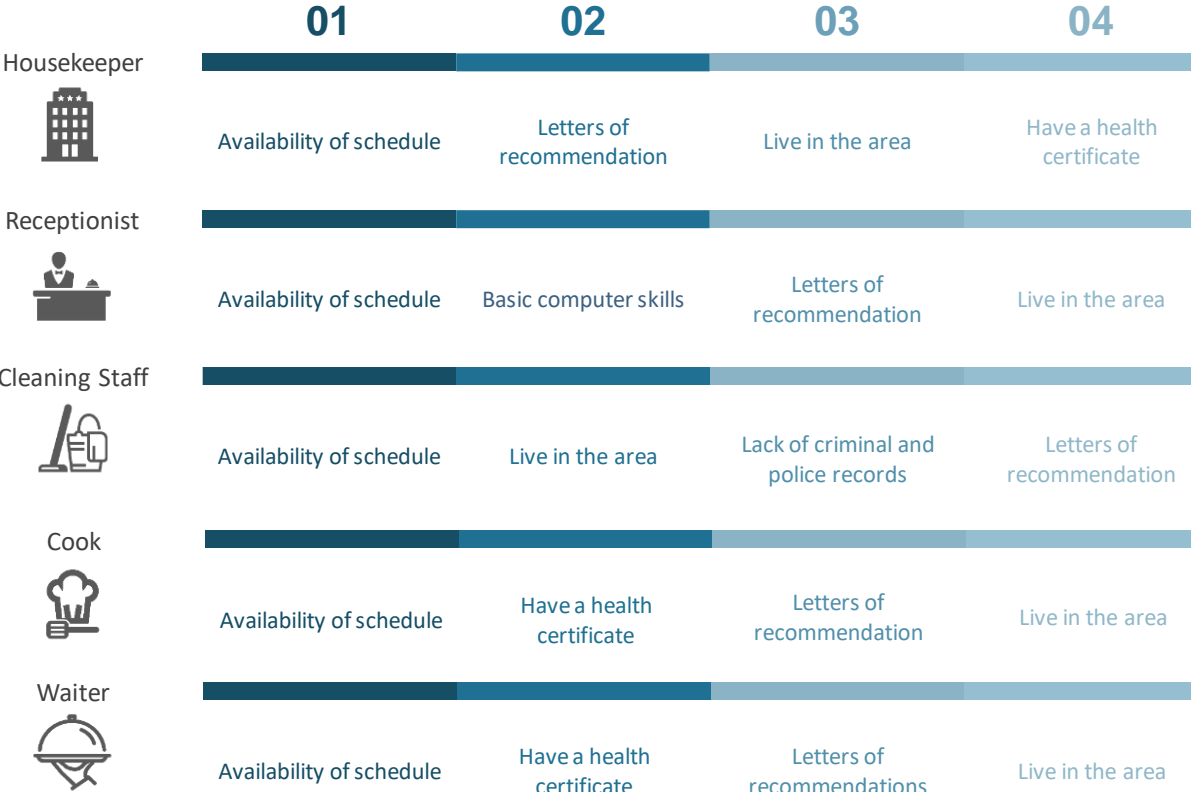|	01	02	03	04
Housekeeper	Proactive and willing to work under pressure	Attention to detail	Effective and clear written and spoken communication	Teamwork
Receptionist	Effective and clear written and spoken communication	Proactive and willing to work under pressure	Generate solutions and offer good service to customers	Attention to detail
Cleaning Staff	Attention to detail	Generate solutions and offer good service to customers	Proactive and willing to work under pressure	Teamwork
Cook	Proactive and willing to work under pressure	Teamwork	Update your knowledge to improve the performance of your duties	Pass on your knowledge or information to others
Waiter	Proactive and willing to work under pressure	Attention to detail	Effective and clear written and spoken communication	Teamwork

Exhibit 14 shows the requirements for each job position. Respondents noted that availability to work was the most important requirement across the five positions. Other important requirements were letters of recommendation and having a health certificate. Receptionist was the only position that required basic computer skills.

Exhibit 14. Job Requirements in Order of Importance, by Position

	01	02	03	04
Housekeeper	Availability of schedule	Letters of recommendation	Live in the area	Have a health certificate
Receptionist	Availability of schedule	Basic computer skills	Letters of recommendation	Live in the area
Cleaning Staff	Availability of schedule	Live in the area	Lack of criminal and police records	Letters of recommendation
Cook	Availability of schedule	Have a health certificate	Letters of recommendation	Live in the area
Waiter	Availability of schedule	Have a health certificate	Letters of recommendations	Live in the area

Vacancies

After examining the characteristics of the most common positions in the industry, the IMPAQ team analyzed whether the surveyed establishments had vacancies in the 12 months prior to data collection. In total, the surveyed establishments reported 1,276 vacancies. Exhibit 15 shows the number of vacancies by region, disaggregated by hotel rate, as well as average number of vacancies by department. The highest number of vacancies are concentrated in high-rate hotels (38 percent), or an average of 8.3 vacancies per hotel. In comparison, medium-rate hotels have an average of 3.3 vacancies per establishment, while low-rate hotels have 1.6. Regarding the distribution of vacancies by region, the highest number was in Cortés, followed by Atlántida.

Exhibit 15. Number of Job Vacancies, by Region and Rate

■ All Hotels ■ High-Rate ■ Medium-Rate ■ Low-Rate

Region	All Hotels	High-Rate	Medium-Rate	Low-Rate
Colón	13	0	6	7
Intibucá	21	0	4	17
Lempira	28	0	5	23
Comayagua	32	0	4	28
Isla de la Bahía	177	139	34	4
Copán	188	21	50	117
Francisco Morazán	216	57	88	71
Atlántida	233	144	24	65
Cortés	368	127	138	103

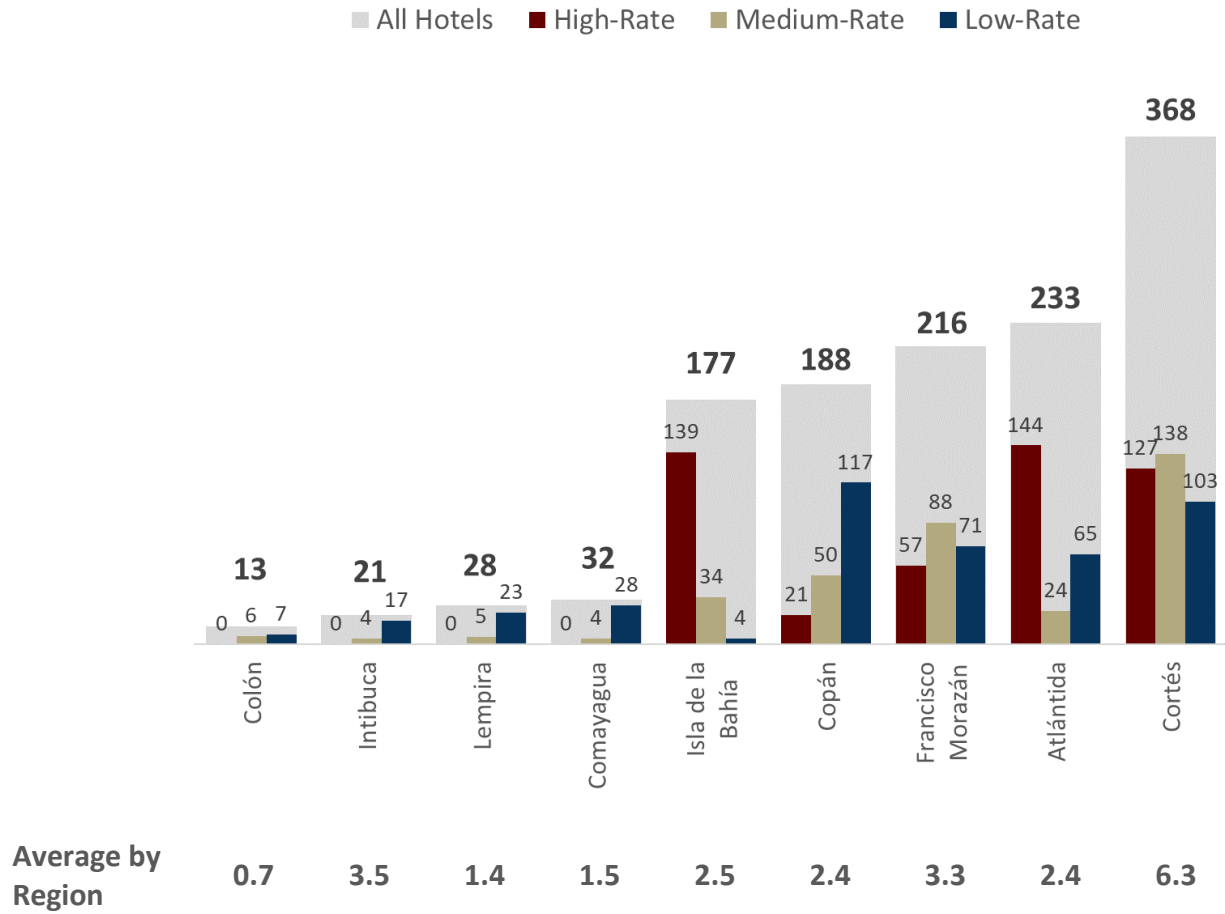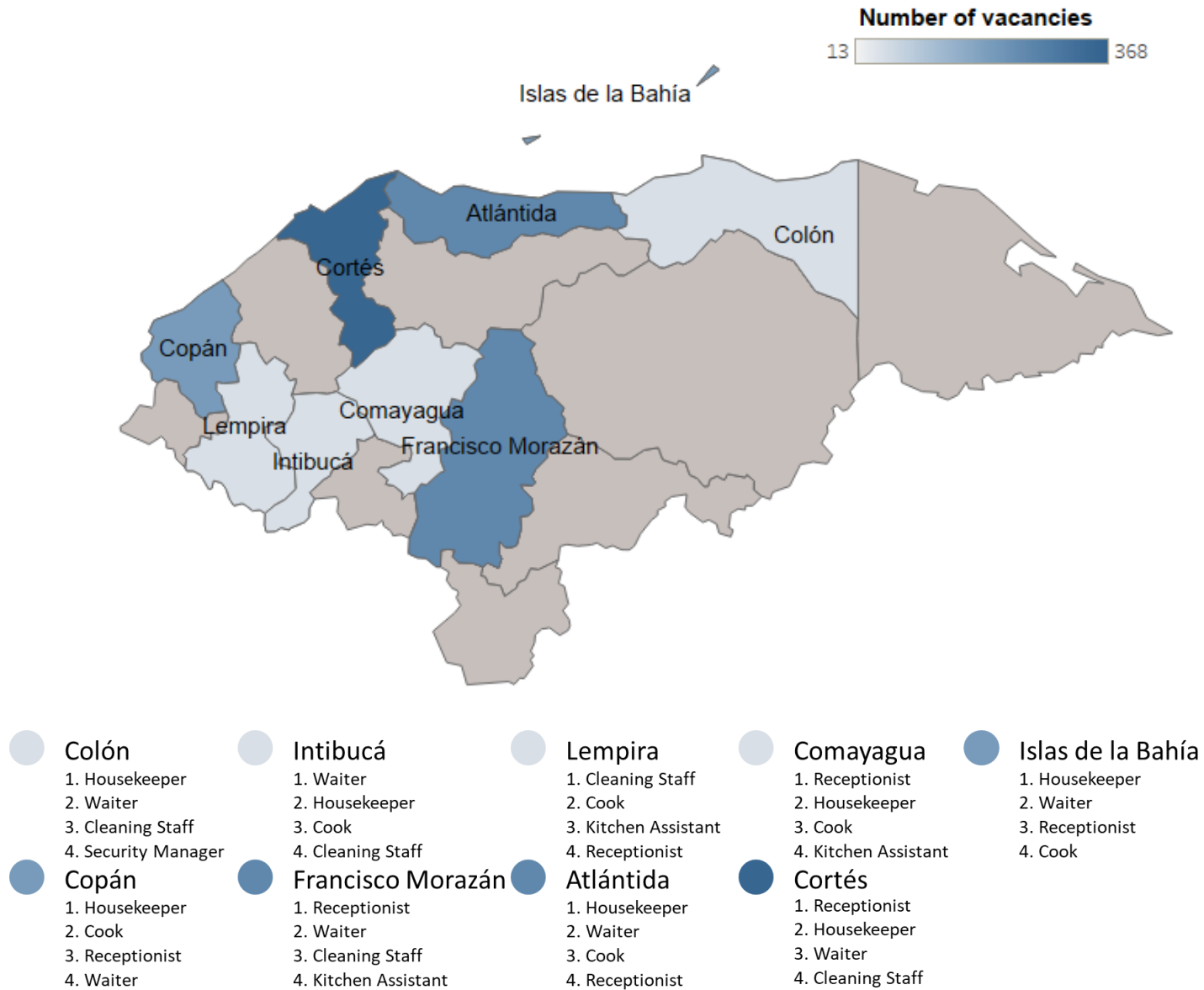| Average by Region	0.7	3.5	1.4	1.5	2.5	2.4	3.3	2.4	6.3

Exhibit 16 shows the density of vacancies by region, as well as the four positions with the highest number of vacancies arranged from the highest number of vacancies to the lowest. The positions of waiter, housekeeper, receptionist, and cook had the highest number of vacancies registered across all regions.

Exhibit 16. Vacancies, by Region

Number of vacancies

13 ▭ 368

Islas de la Bahía

Atlántida

Colón

Cortés

Copán

Comayagua

Lempira

Francisco Morazàn

Intibucá

○ **Colón**
1. Housekeeper
2. Waiter
3. Cleaning Staff
4. Security Manager

○ **Intibucá**
1. Waiter
2. Housekeeper
3. Cook
4. Cleaning Staff

○ **Lempira**
1. Cleaning Staff
2. Cook
3. Kitchen Assistant
4. Receptionist

○ **Comayagua**
1. Receptionist
2. Housekeeper
3. Cook
4. Kitchen Assistant

● **Islas de la Bahía**
1. Housekeeper
2. Waiter
3. Receptionist
4. Cook

● **Copán**
1. Housekeeper
2. Cook
3. Receptionist
4. Waiter

● **Francisco Morazán**
1. Receptionist
2. Waiter
3. Cleaning Staff
4. Kitchen Assistant

● **Atlántida**
1. Housekeeper
2. Waiter
3. Cook
4. Receptionist

● **Cortés**
1. Receptionist
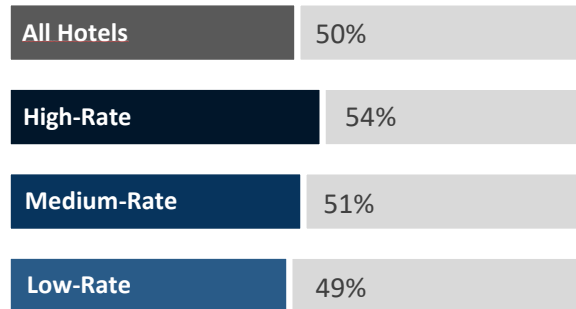2. Housekeeper
3. Waiter
4. Cleaning Staff

Changes in Personnel Demand

The results in this section highlight employer expectations for personnel needs in the next three years (between 2020 and 2022). As shown in Exhibit 17, 50 percent of the total number of hotels indicated that they would require more staff during this period. When analyzing the increase in demand by rate, 54 percent of high-rate hotels expect that there will be positions in their establishments that demand more staff in the following three years. The percentage is lower, but still significant, for low-rate hotels (49 percent).

Exhibit 17. Proportion of Hotels Expecting Increased Staff Demand, by Rate Type

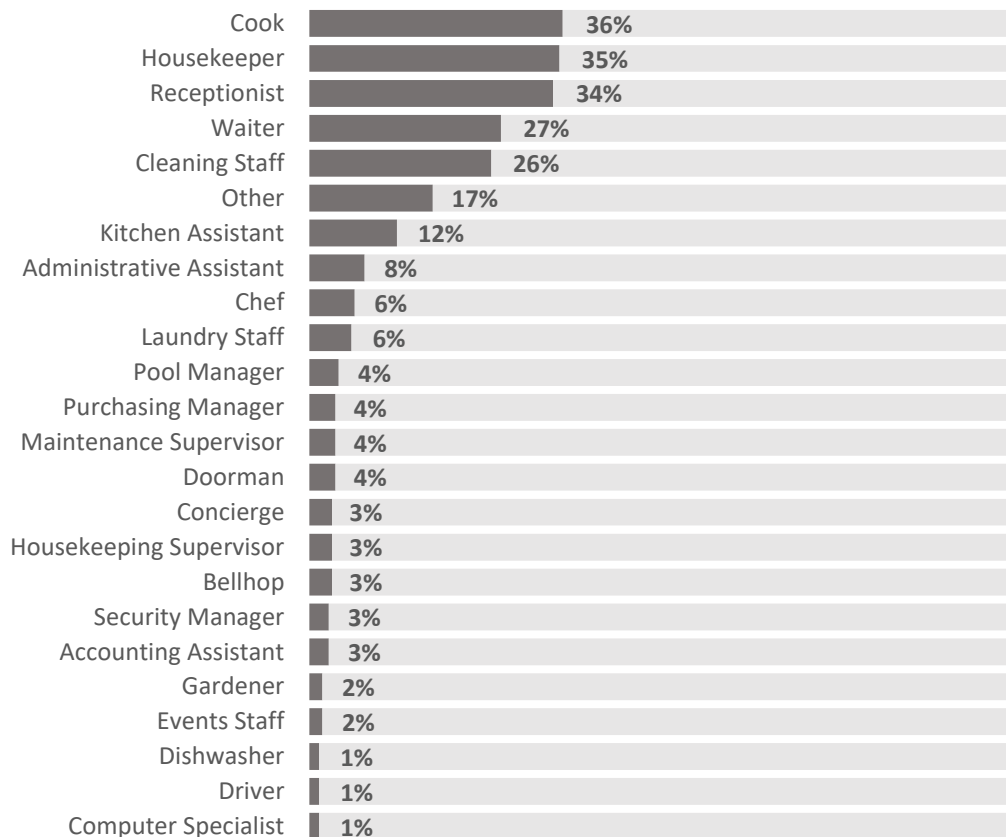|	
All Hotels	50%
High-Rate	54%
Medium-Rate	51%
Low-Rate	49%

Exhibit 18 shows the positions that will experience the greatest demand for more personnel in the next three years. Hotels mentioned cooks (36%), housekeepers (35%), receptionists (34%), waiters (27%), and cleaning staff (26%) most frequently.

Interestingly, respondents mentioned a need for nontraditional occupations such as event staff, drivers, and computer specialists. The mention of these less-common positions may hint at a future industry need.

Exhibit 18. Proportion of Hotels Expecting an Increase in Demand for Personnel in the Next Three Years, by Job Position

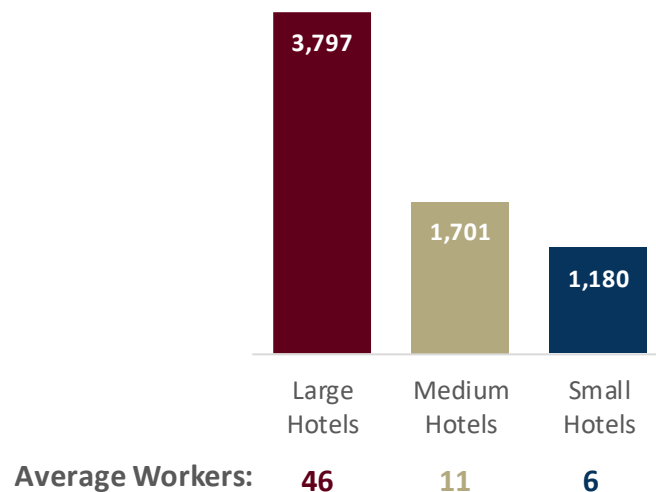| Position	Percentage
Cook	36%
Housekeeper	35%
Receptionist	34%
Waiter	27%
Cleaning Staff	26%
Other	17%
Kitchen Assistant	12%
Administrative Assistant	8%
Chef	6%
Laundry Staff	6%
Pool Manager	4%
Purchasing Manager	4%
Maintenance Supervisor	4%
Doorman	4%
Concierge	3%
Housekeeping Supervisor	3%
Bellhop	3%
Security Manager	3%
Accounting Assistant	3%
Gardener	2%
Events Staff	2%
Dishwasher	1%
Driver	1%
Computer Specialist	1%

Annexes

This annex presents the survey results categorized by number of hotel rooms, according to the classification of the Honduran Institute of Tourism. Small hotels are those with 1 to 20 rooms; medium hotels have 21 to 40 rooms, and large hotels have 41 or more rooms.

Annex 1. Distribution of Hotels, by Number of Rooms

Large Hotels	82
Medium Hotels	162
Small Hotels	193
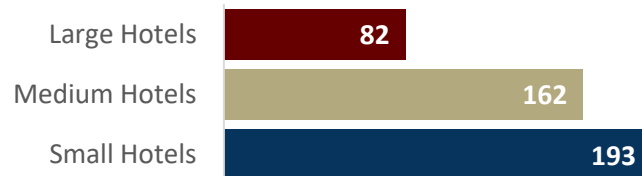
Annex 2. Employment in Surveyed Hotels, by Number of Rooms

	Large Hotels	Medium Hotels	Small Hotels
	3,797	1,701	1,180
Average Workers:	46	11	6

Annex 3. Female Labor Participation Rate in Hotels, by Number of Rooms

All Hotels	53%
Large Hotels	49%
Medium Hotels	56%
Small Hotels	59%
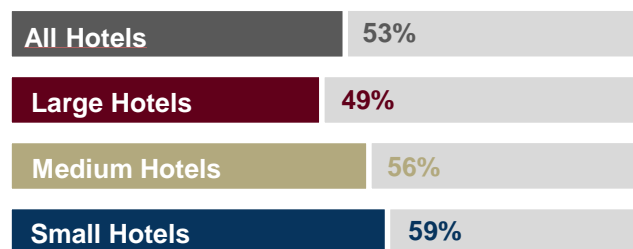
Annex 4. Minimum Academic Training Required, by Number of Rooms

■ Small Hotels   ■ Medium Hotels   ■ Large Hotels

No School
- Small Hotels: 15%
- Medium Hotels: 12%
- Large Hotels: 10%

Primary
- Small Hotels: 25%
- Medium Hotels: 31%
- Large Hotels: 19%

Secondary
- Small Hotels: 47%
- Medium Hotels: 43%
- Large Hotels: 51%

Technical School
- Small Hotels: 8%
- Medium Hotels: 11%
- Large Hotels: 13%

University
- Small Hotels: 4%
- Medium Hotels: 4%
- Large Hotels: 8%
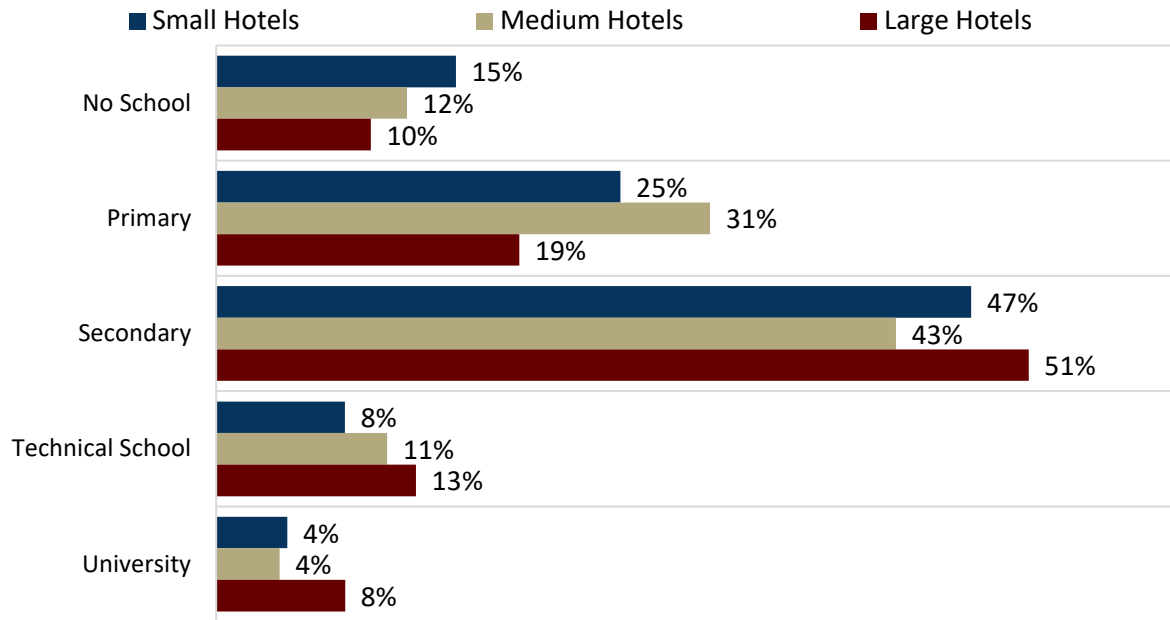
Annex 5. Monthly Salary Range, by Number of Rooms

■ Small Hotels   ■ Medium Hotels   ■ Large Hotels

≤5,999 lps.
- Small Hotels: 8%
- Medium Hotels: 9%
- Large Hotels: 13%

6,000 – 7,999 lps.
- Small Hotels: 15%
- Medium Hotels: 20%
- Large Hotels: 12%

8,000 – 9,999 lps.
- Small Hotels: 46%
- Medium Hotels: 41%
- Large Hotels: 48%

10,000 – 14,999 lps.
- Small Hotels: 27%
- Medium Hotels: 26%
- Large Hotels: 24%

≥15,000 lps.
- Small Hotels: 3%
- Medium Hotels: 5%
- Large Hotels: 2%