Islamic Republic of Afghanistan
Ministry of Labour, Social Affairs, Martyrs and Disabled

NSDP

National Skills Development Programme

An Urban Based Study of Labour Supply and Demand, and Public Opinion, Covering the Media, Tourism and Hospitality Sectors

Dec, 2009

Table of Contents

FORWAD

This study was carried out by the Labour Market Information Analysis Unit (LMIAU) with the technical support of the National Skills Development Programme (NSDP) and financial support of the World Bank. It was carried out in five provincial capital Cities of Kabul, Jalalabad, Balkh, Herat and Kandahar with the following objectives:

- To study labour supply and demand in media, tourism, and hospitality sectors in Kabul, Kandahar, Herat, Balkh, and Nangrahar provinces, the five biggest provincial capitals of Afghanistan.
- To obtain public opinions and preferences related to media sector in Afghanistan.
- To obtain tourist opinions on tourist facilities, services, source of information, and perception of value for money.
- To obtain hotel clients opinions on provision/services of hospitality sector.

This report will help the planners and policy makers, and business developers with useful information to improve the sectors in future.

My thanks go to Noor Mohammad Qarqeen, the Minister of Labour and Social Affairs, Martyrs, and Disabled and to Mohammad Ghaus Bashiri, Deputy Minister of Labour, Social Affairs, and Martyrs that they supported the study politically.

This study could not have been completed without the commitment and tireless technical support of Abdul Rahim, National Program Director, Abdul Rahim Nasry National, Program Coordinator, Steven Vardigans Senior technical Advisor and valuable guidance and assistance of Khair Mohammad Niru, General Director of Department of Manpower and Labour Affairs Management, and Mohammad Asif Stanikzai, Monitoring and Evaluation Manager in every step of survey planning and analysis.

Finally, I wish to recognize contribution of Hameedullah Hamdard, Database Officer for database configuration and his hard work, and heartily participation of the LMIAU staff in the whole process of the study.

Jana Gul Hanify

Dec, 2009

EXECUTIVE SUMMARY

1. A) Media Sector

Employment

Across the five provincial capitals in the sample studied, 56% media runs by private sector, 34% by public sector, and the remaining 10% owned by NGOs (97% by local and 3% by international).

Employment level by job type in print media contained 15.4% writers, 10% Managers, 9.4% Editors, 7.8% Administrators, and 7.8% Reporters.

Employment level by job type in broadcast media contains 10.8% Technical Officers, 8.4% News Readers, 8% Producers, and 6.9% Marketing Officers, and 6.7% Journalists.

The media sector contains 82.8% male locals, 15.9% female locals, 0.5% male foreigners, 0.8% female foreigners. Full time employment rate was 83%, and part time 17%.

8% employers in media sector demanded for hiring of foreigners. The breakdown of foreigners demand by skills indicates 35% Journalists, 30% Technical Staff, 20% Managers and or Administrators and 15% having English Language skill.

40% respondents stated that finding qualified applicants for management positions where previous experiences are required is quite difficult.

80% employers stated that employment rate in their businesses have remained stable in the past 12-months, 12% stated that employment rate has grown up in their businesses, and the remaining 8% stated that employment rate has declined particularly in print media.

Programming and publication

Among the news, entertainment, documentary, religious, science, cultural, political, and social programmes 35% entertainment and 20% news in broadcast media were identified as main programmes.

Among the news, entertainment, documentary, religious, science, cultural, political, and social 25% news contents and 18% political and social contents were identified as main contents in print media.

Source of Finance

59% financial support of T.V and 53% of Radio comes from advertisements. 38% financial support of newspapers and 46% of magazines comes from the government. 50% financial support of cable networks come from the monthly fee of customers, 49% comes from sale of publications, and 1% from advertisements.

Skills Demand

There was demand for 25 skills in the media sector. The main skills-demand was 16.7% for designers, 14.8% for computer operators, 12.8% for managers, and 7.1% for reporters.

Recruitment Method

32% recruitment was experienced through director approach of job seekers, 22% from TV and Radio advertisements and from relevant ministry transfer system in print media, and 19% internal transfer. The rest 27% recruitment comes from employees and employers referral system, employment services centers, and directly from training centers.

Salary by job type

The highest average range of salary by job type in print media is the Programme Producers and Cartoonists (Afs. 17,500) each, Supervisor and Web Designer (Afs. 12,500), Analyst (Afs. 9,642), and Translators (Afs. 9,772).

In broadcast media average salary for Secretary (Afs. 17,500), IT Officers (Afs. 15,000), Writers, HR Officers, Graphic Designer (Afs. 12,500) each, Radio Operators, Directors, Cameramen, Broadcasting Officers and Administrators (Afs. 10,000).

1. B) Public Opinion on Media Sector

34% T.V and 26% Radio were identified as a main facility for news and for entertainments. The main source of news and information were identified Newspapers (18%) and Radio (32%).

88% people were satisfied with news and entertainments on Televisions and Radios. 71% respondents have access to news everyday and 15% have access three times in a week.

25% TV news, 20 % radio news, and 15% friends were identified as a main source of general news and information.

28% respondents stated that on average they spent less than 1 hour for media coverage and reading books for leisure, 73% respondents stated that they do not use internet at all. 89% respondents were satisfied with media coverage of news and entertainments.

2. A) Travel and Tourism Sector

Employment

16.7% Ticket Sellers, 13% Directors, 9.1% Assistants, 8.2% Computer Operators, and 7% Finance Officers were identified the high level employment by job type in the sector of tourism. The remaining 47% employment by job type covers Marketing Officers, General Managers, IT Officers, Guides, Cooks, Clerks, Cleaners, Administrators, and Accountants. 85% employment in travel/tourism sector covers male locals, 10% male foreigners and the rest 5% female locals and foreigners. 41% respondents reported that finding qualified applicants for management positions are quite difficult. It was found that employment in tourism sector is 100% full time. Part time and temporary employment was not found in the sector.

46% services in tourism sector were identified Ticket Delivery and 37% Ticket Delivery and Visa Assistance. 9% services cover Ticket Delivery and Tourism Services. The remaining 8% covers Logistic Services.

25% tourist companies provide nature (wild life/camping) and 25% boat tour. 34% were involved in ticket delivery and visa assistance. The remaining 16% facilitate Culture/Heritage tours and Nature Adventure (Biking, horse back riding, trekking).

Skills Demand in travel/tourism sector

31.7% Computer Software, 25% English Language Speakers, 10.3% Internet users, 3.5% VRS (Visitor Registration System) user, and 5.5% Galileo System user were identified as main skills demand in travel/tourism sector. The remaining 24% skills demand cover traveling system, ticketing, management, Turkish Air System, Cyber system, marketing skills, and International Languages.

Salary by job type

As an average the Director positions receives Afs.10,556 per month, Finance Officer receives Afs. 9,772, Computer Operator, Marketing Officer, and Ticket Seller each Afs, 8,000 on monthly basis.

2. B) Tourist Opinions

95% of the respondent visitors organized trips by their own, 3% through tour operators, and the rest 2% through internet and travel agencies. 40% of the respondents mentioned difficulty in organizing of tours, and 30% mentioned unavailability of information.

97.8% of the respondent tourists recommend tourist places for others as well and the remaining 2.2% did not recommend the tourist places for other tourists. Over 37.8% of the respondents suggested provision of more security measures to the tourists.

88% of the respondents identified spring as a best season for tourism in Afghanistan, 8% mentioned summer and the 4% mentioned fall and winter seasons for tourism.

90% respondents considered friends/relatives and 10% TV and Radio advertisements, magazines/papers and internet as a best source of information about the tourist places.

The 74.7% respondent tourists were belonging to age groups of (15-34) years, and 15% of were belonging to age group of (35-44) years and the rest 10.3 were belonging to age group over 45 years.

22.8% of the respondents were identified illiterate, 27.6% high school graduates, 17.5% middle school graduates, 11.2 were primary school students, and 19.3% university graduates.

Over 44.8% respondents suggested provision of security measures and reconstruction and development of the tourist places.

3. A) Hotels and Guesthouses

Employment

The high employment level by job type covers Waiters (40%), Cooks (12%), and Guards (10%). This sector contains male locals (88%), male foreigners (6%), female locals (5%) and female foreigners (1%). About (99%) of them are full time and 1% is part time employees.

72% employers in the hospitality sector stated that employment level remained stable. 16% responded stated that employment level has been declined and 12% said the employment rate has grown up in the last 12 months. The highest employment rate declined in the sector was observed in Kandahar.

25% employers stated that finding qualified applicants for management and non management positions are quit difficult.

Room Service

As an average, the high price of room (Afs. 1,100), middle price (Afs. 700) and low price Afs. 600 were identified in the combined sample. The highest average of high price of a room (Afs. 1,800), middle price of a room (Afs. 1,200) and low price of a room (Afs. 1,000) identified in Kabul. The average guest capacity was identified 80 persons and the average guest occupancy rate was 22 individuals per night.

Business marketing method

The main business marketing method at national level was Business Cards (30%), T.V advertisement (17%), Radio and Magazine business marketing 25% each. The main business marketing method at international level was internet (36%), and Airline Magazine (26.5%).

Skills Demand

Main skills demand in hospitality sector were Cooking (62%), Computer and Behavior skills 6% each, Waiter, Cleaning and Administration skills demand 5% each.

Salary by job type

The average salary for IT Officers and Plumbers was Afs. 17,500. While, in general, the overall average salary was Afs. 7,500 in the hospitality sector.

3. B) Hotel Client Assessment

34% stay in hotels was related to business, 15% visit friends and families, 13% was related to tourism, 9% passing through, and the rest 29% was related to students, labourers, travelers, and treatment purposes.

80% of the hotel customers referenced by previous guests/friends, 7% referenced to hotel/guest house brochures, and the rest 13% referenced to Tourism Department, Internet, Taxi Drivers, Incidentally Stumbled, and through sign boards.

43% of the respondent customers stated that the quality of services was average, 37% respondents stated that the quality of services was good, 14% mentioned the services were very good, and the rest 6% said that the quality of services were poor.

43% of the hospitality sector has T.V facilities, 42% room services, 8% transportation, and 5% internet facilities.

81% of the hospitality sector respondents reported value of money reasonable, 10% reported expensive, and the rest 9% report poor against the provision of services.

90% of the respondent hotel clients considered booking system, administration, quality of food, quantity of food, quality of services, food presentation, staff attitude, food variety, accommodation, and delivery timing were either good or satisfactory and the rest 10% respondents said that the above mentioned facilities/services need improvement.

Over 55% of the total respondents asked improvement in car parking facility.

THE STUDY LIMITATIONS AND METHODOLOGY

Due to inappropriate tourism season, time and resource limitations, and insecurity the study becomes limited to 5 big capitals of Kabul, Kandahar, Herat, Balkh, and Nangrahar provinces. This study was conducted between the months of February and March, 2009 which is a cool season in Afghanistan; roads are blocked to some provinces due to snow fall.

Financial resources were limited to cover the whole country and implementation time of the project was limited only to a few months. In addition, insecurity also contributed to limitation of the geographical coverage of the project.

Even though some provinces such as Bamyan, Kapisa, Badakhshan, and Nuristan absorb tourists, but due to the above mentioned problems it was decided to limit the study to the 5 provinces. These five provinces are capable to represent the media, tourism, and hospitality sectors at the country level.

The study methodology covers sampling source for the study, sampling and sample distribution, weighing, and quality control.

Sampling source for the study

All together, 6 questionnaires were developed for Media, tourism, and hospitality sectors. For each sector two questionnaires, one for supply and another for demand were developed, tested, and implemented. The questionnaires were:

a) Media (supply side),
b) Media Opinion poll (demand side),
c) Tourist company (supply side),
d) Tourist opinion (demand side),
e) Hotel and guesthouse (supply side), and
f) Hotel clients (demand side).

a) Media survey

For the media survey Media Directory of AISA, MoIC and NAI was used. Even though the Print Media Directory was not updated and more than 50% print media centers were either not active or were moved some where else. This is why the surveyors searched the print media centers door to door.

b. Media Opinion Poll

For the media opinion poll, the CSO Population Data of 2006[1] was used. The study was limited to urban area, therefore, the CSO urban population data was used as a baseline for the study.

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[1] Central Statistic Office: Estimated Urban Population (15-64) age group 2006

c) The Tourist Companies Survey

The AISA and Ministry of Information and Culture Tourist Company Directory[2] was used for the tourist companies survey.

Tourist Opinion Poll

The survey team contacted relevant tourist agencies for collection of data and number of tourists for determination of baseline for the sampling. But, the companies did not provide reliable information and data to be used as a baseline for the study. Therefore, the surveyors visited entertainment places of Bagh-e-Babar, Bustan-e-Kabul, Kabul Zoo, Qargha, and Bagh-e-Zanana in Kabul City.

As an average, 120 visitors per entertainment place were counted. This number was used as a baseline for sampling of tourists in the rest of the provinces.

Hotels & Guesthouses survey

The AISA and the Ministry of Information and Culture data was used as a baseline for the study. It was found that the list of hotels was accurate but most of the guesthouses were not found through the list.

Hotel clients' survey

There was no agency or source to provide reliable data on hotel clients to be used as a baseline for the hotel clients study. The survey team studied 14 hotels and 10 guesthouses randomly and found 29 clients as an average at the time of study which was used as a baseline data for this study.

SAMPLING AND SAMPLE DISTRIBUTION

Using Raosoft sample size calculator with 7% margin of error tolerance which is a common choice, 95% confidence level and 50% response distribution that gives the largest sample size was used.

Based on the Raosoft sample size calculator 262 media centers, 750 individual for public opinion about media, 114 travel and tourist companies, 588 individuals for tourist opinions, 112 hotels and guest houses, 624 individuals as hotel clients were interviewed in this study.

Due to easy access in media sector all TVs and Radios were interviewed except a few that did not provide information or denied the surveyors access.

[2] This is a soft copy provided by AISA updated in 2008.

WEIGHING

Random selection

For random selection lottery system was used for hotels, guest houses, tourist companies, and print media.
Quota sampling[3] method was used in media opinion poll, tourists' opinion poll, and hotel clients. The media opinion poll was divided into four categories of business owners and street venders, students and teachers, males and females, public and non government employees and educated and uneducated covered by the first two categories.

The hotel clients and tourists were divided into male and female categories. Each group was divided into sub-groups, defined by locals and foreigners and were furthermore divided by ethnic groups in order to cover all the people.

Based on the defined number, quotas were set for the interviews to be completed in each group. It was planned and the surveyors were instructed to interview males and females with equal ratio, but due to cultural limitations in Kandahar, Heart, and Mazar-e-sharif it was difficult for the surveyors to meet the equal ratio, but in Kabul and Jalalabad the ratio was met.

Questionnaires

The questionnaires were developed in English language and drafts were circulated among the key stakeholders such as AISA, Manpower Department, World Bank, and NSDP for feedback. The feed back was incorporated in the final version and was translated into Pashto and Dari languages.

The pilot survey was conducted in Kabul City to test the survey methodology, logistics, and wording of the questionnaires in Pashto, Dari and English languages. Small changes were learned through the pilot survey and were incorporated in the final survey.

Training of Surveyors

The five provincial capital Cities of Kabul, Jalalabad, Mazar-e-sharif, Herat and Kandahar were planned to be surveyed. The General Director of Man Power Department and the LMIAU Supervisors trained the NSDP regional officers as well as the LIMAU Staff on the questionnaires and the regional officers were instructed to train the surveyors and supervise them in the assigned provinces. In Kabul, the LMIAU Manger and Supervisors, supervised the surveyors as well as supervised the surveyors by checking their forms through phone contact in the provinces.

[3] Quotas Sampling means proportional sampling (equal ratio of different category of the people such male and female, educated and uneducated, poor and rich etc).

Data Collection

Before conducting final survey a pilot survey was conducted to ensure the questionnaires contained the required information. After the pilot survey and reviewing the questionnaires six surveyors were assigned for each of the 6 provinces. In order to make it easier and understandable for the surveyors this number was further divided into three groups. Each group was assigned for surveying a specific sector i.e. media, tourism, and hospitality.

The data collections continued for 15 days from the day of commencement the survey including 3 days training to the Field Supervisors and the LMIAU staff. Main issue in collection of the data was finding real tourists in the winter season.

Quality Control

Visual Check

After collection of the data, all the questionnaires were visual checked in the office. The incomplete questionnaires were separated and forwarded for phone checking.

Phone check

For validity and reliability of the collected data 10% (300 questionnaires) were randomly separated and checked by phone. Out of the 300 random selected questionnaires 7.3% (22) contact numbers were wrong due to either clerical mistakes or intentionally giving wrong number by the respondents and 17.5% (52)of them were either off or didn't reply.

Database Cleaning

During the data entry process the Data Entry Supervisor and two expert data entry clerks checked and ensured the entered data. The entered data was reviewed and made ready for analysis and reporting.

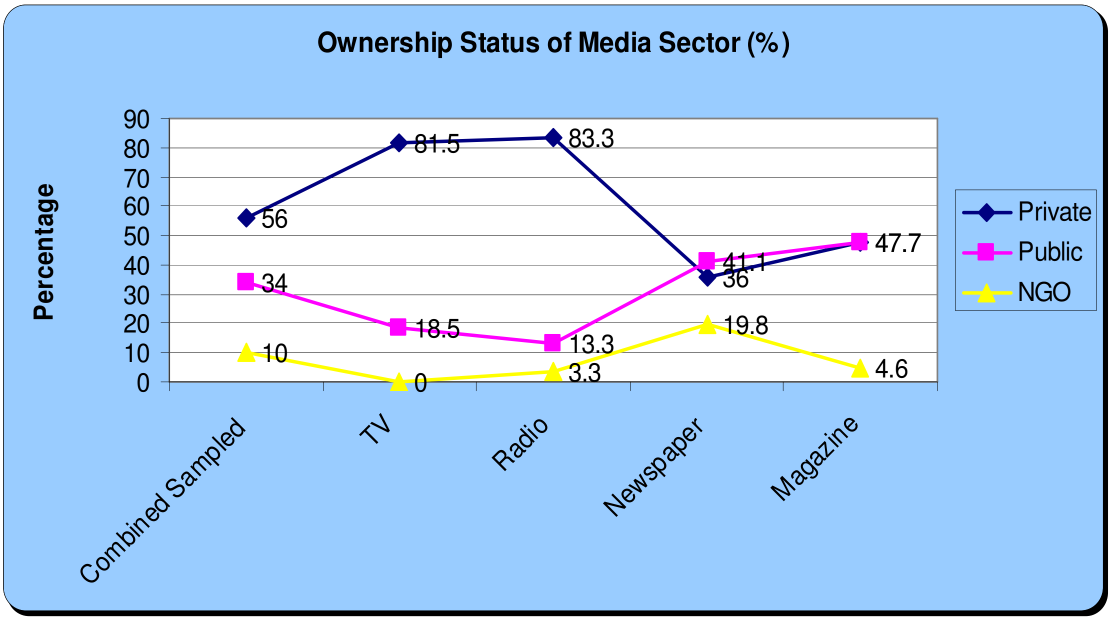
CHAPTER ONE

PRINT AND BROADCAST MEDIA SECTOR

Print and Broadcast Media

1.1 The Ownership Status of Media Sector

Chart 1

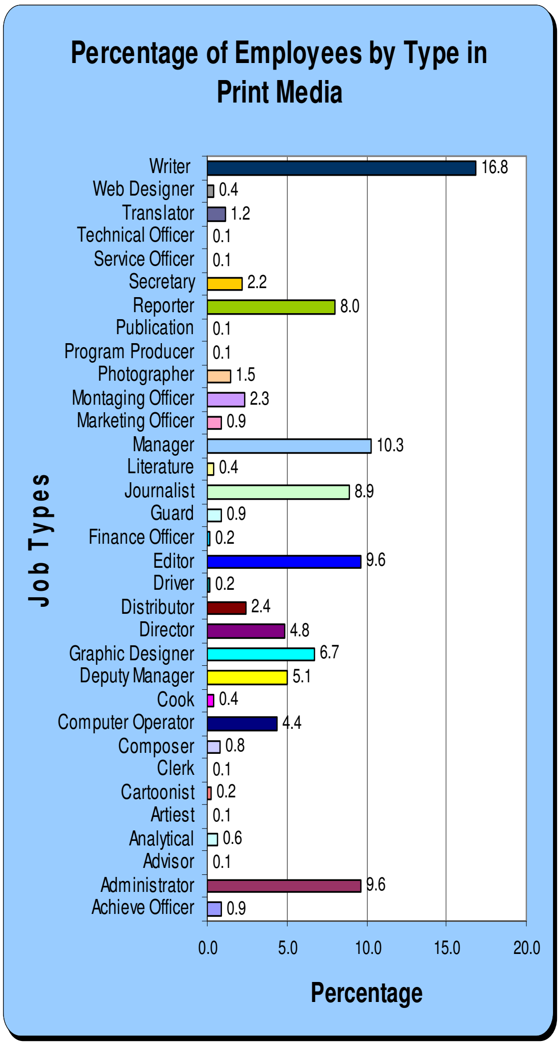


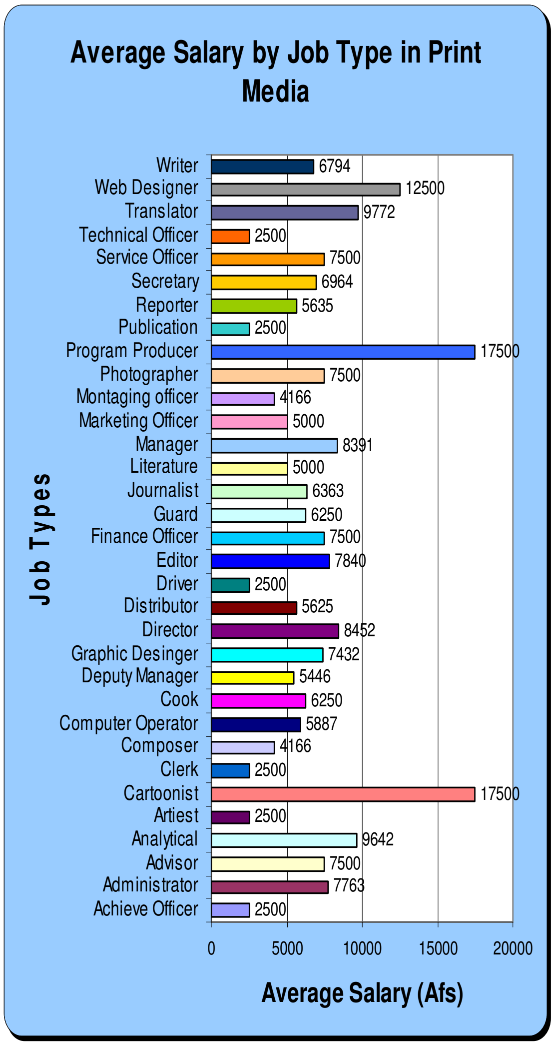
The combined sample of the media sector across the five targeted provinces shows that 56% media runs by private sector, 34% by public, and the rest 10% by NGOs. 97% of the NGOs run media owned by national NGOs and 3% by international.

The disintegrated media sector shows that 82% Television and Radio are owned by private sector. In print media, 41.1% newspapers and 47.7% magazines owned by public sector.

1.2 Average Salary of Employees by Job Role in Print Media

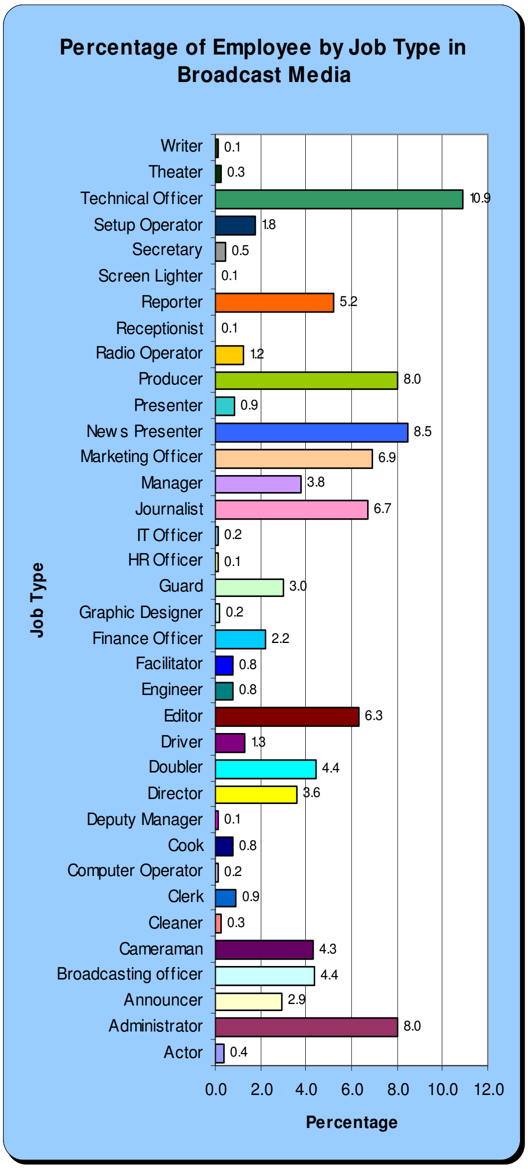
Chart 2

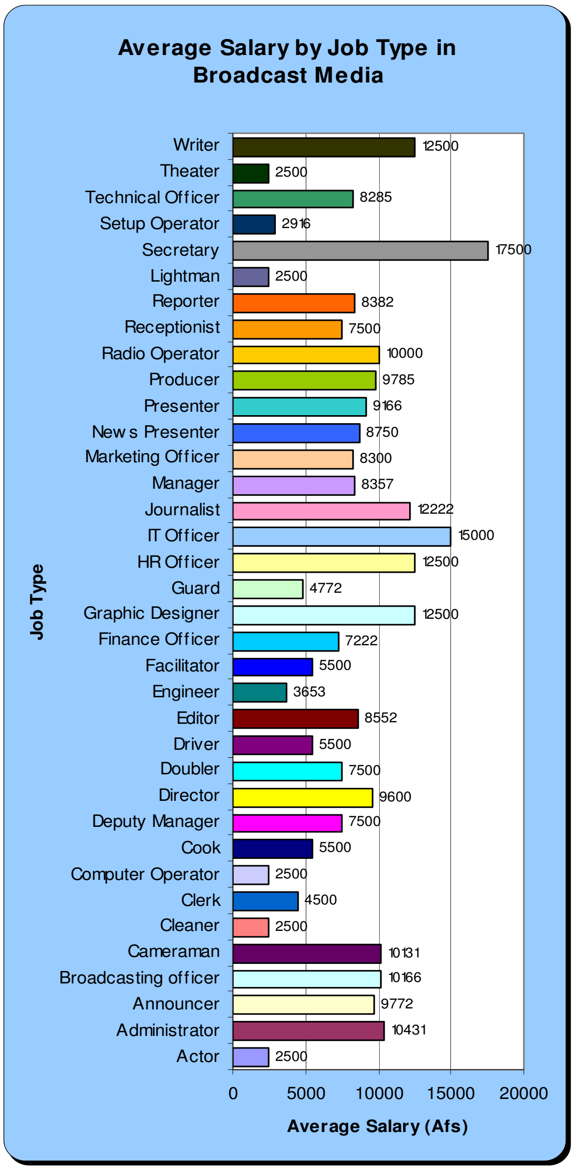




1.3 Average Salary and Percentage of Employees by Job Type in Broadcast Media

Chart 2a





The chart 2 and 2a represent average salary and employment level by job type in print and broadcast media in both public and private sectors.

The number of employees in both print and broadcast media manage by public sector is higher compared to private, but the average salary by job type is lower. The number of employees in both print and broadcast media in private sector is lower, but the salary is higher. Therefore, the combined sample represents low salary range in both the print and broadcast media.

The main employment level by job type in print media contained 15.4% Writers, 10% Managers, 9.4% Editors and Administrators, and 7.8% Reporters, which show high number employment rate. In contrary, the employment rate of Programme Producers and Cartoonists is low, but their average salary is Afs. 17,500 per month and average salary for web designers and analytical supervisors are Afs. 12,500 per month.

The main employment level by job type in broadcast media contains 10.85 Technical Officers, 8.4% News Presenters, 8% Programme Producers, 6.9% Marketing Officers, and 6.7% Journalists.

In broadcast media salary by job type is Afs. 17,500 for Secretary, Afs. 12,500 for Graphic Designers, IT Officers, Script Writers, and Afs. 12,222 fro Journalists which appears in the high range of salaries.

1.4 Employment by Gender and Nationality in Media Sector

Chart 3

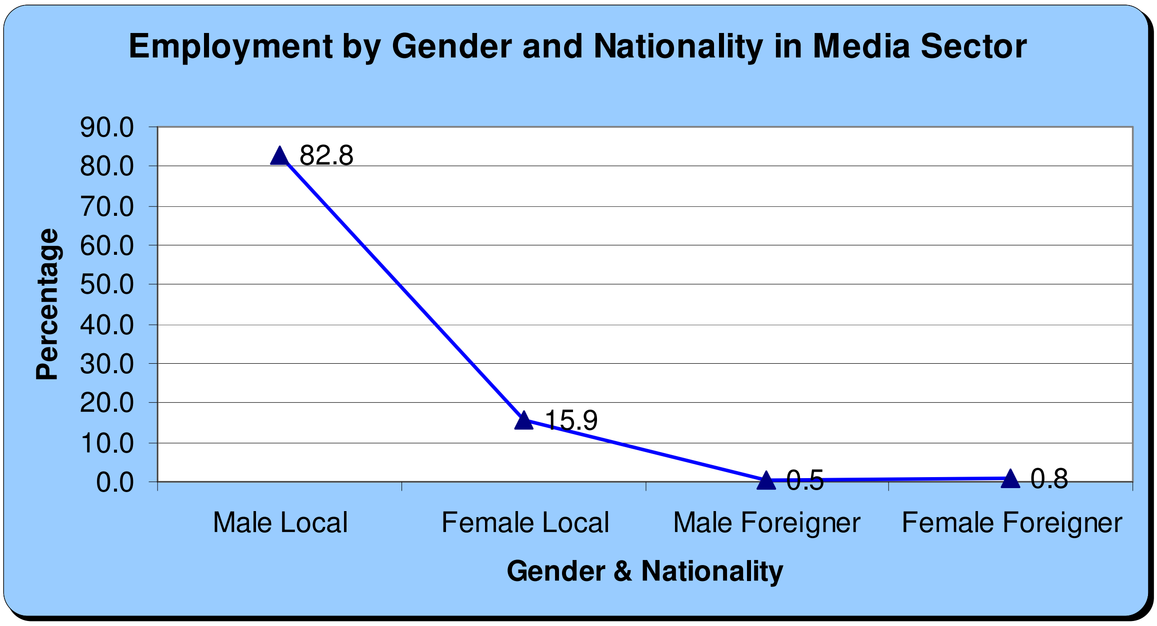


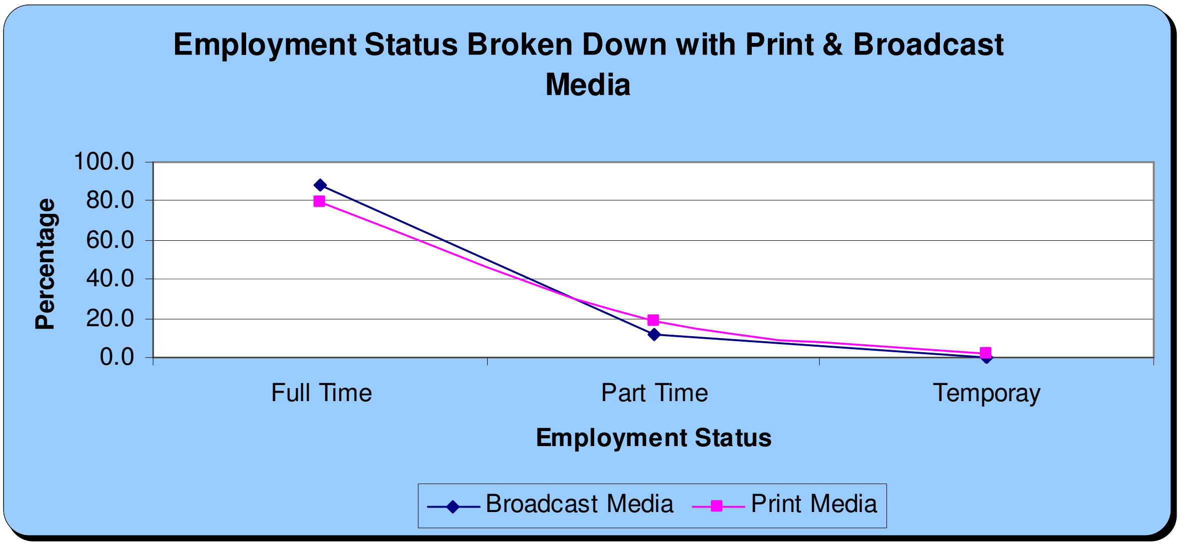
Chart 3 illustrates employment level in both print and broadcast media. The media sector is dominated by males. The employment rate for males is 82.8% and for females are 15.9% which is 5 times less than males.

KILM 5[4] (Part time workers) explains that: part time employment by sex is useful to see the extent to which the female labour force more likely to work part time than the male and part time work is often a characteristic of women employment. Based on KILM 5, If part time employment opportunities is created, women employment rate will be increased.

[4] KILM 5 (Key Indicator for Labour Market) is one of the 20 Key Indicators defined by ILO for Comparison Labour Market among the countries.

1.5 Employment status in Media Sector

Chart 4



In general, there is rapid growth in part time work in developed economy. The chart 4 illustrates that full time employment rate is five times higher than part time employment in media sector. Part time employment in broadcast media is 11.5% and in print media is 18.6%.

In general, women showed interest in part time employment, but beside that age breakdown is also significant and demonstrated that young people age 15 to 24, especially enrolled in school are interested in part time employment.

1.6 Demands for Hiring Foreigners

Chart 5

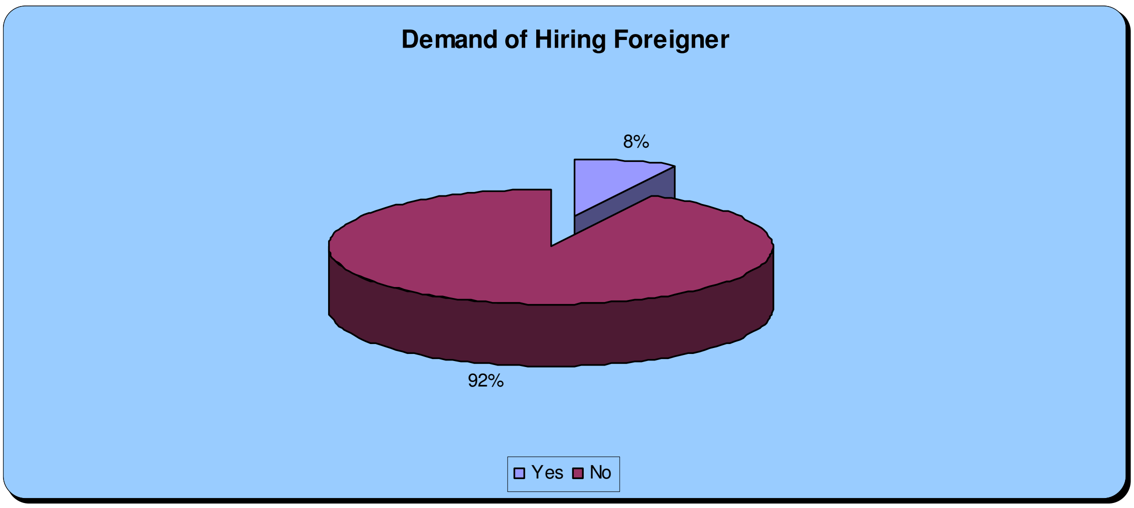
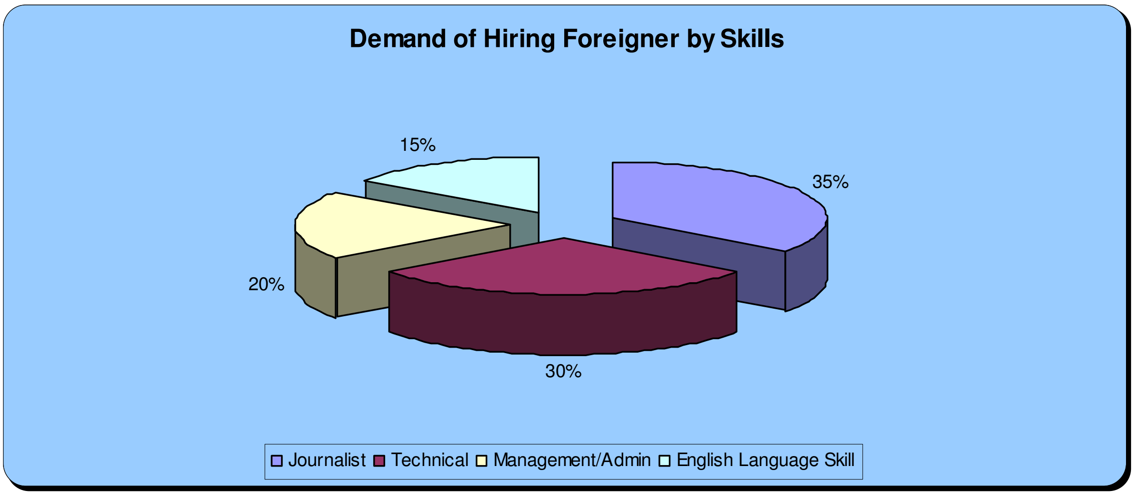


Chart 5a



92% employers stated that there is no need for employment of foreigners, but 8% expressed need for foreigners. The 8% demand is further break downed by 35% Journalists, 30% Technical Staff, 20% Management and Administration, and 15% English language speakers.

1.7 Degree of Difficulty in Finding Qualified Applicants

Chart 6

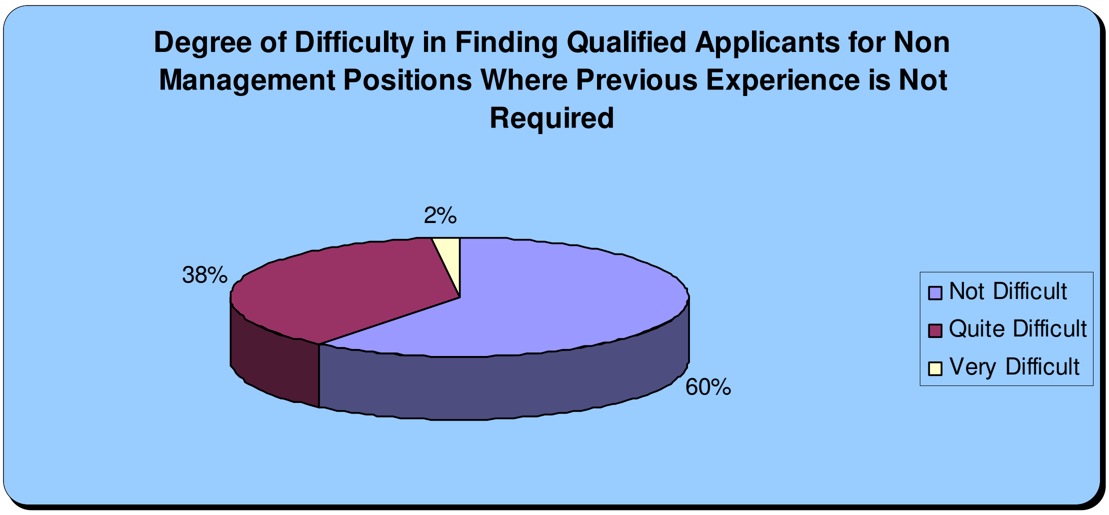


Chart 6a

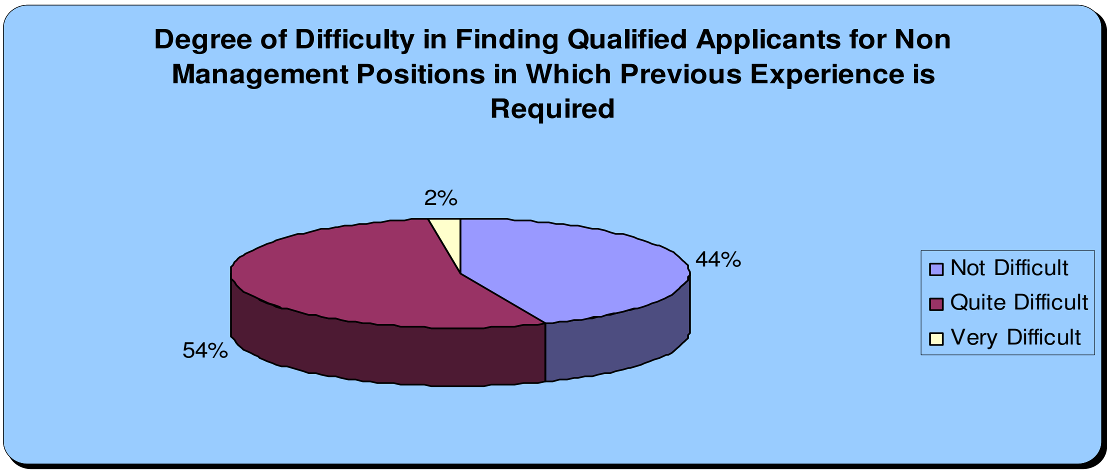


Chart 6b

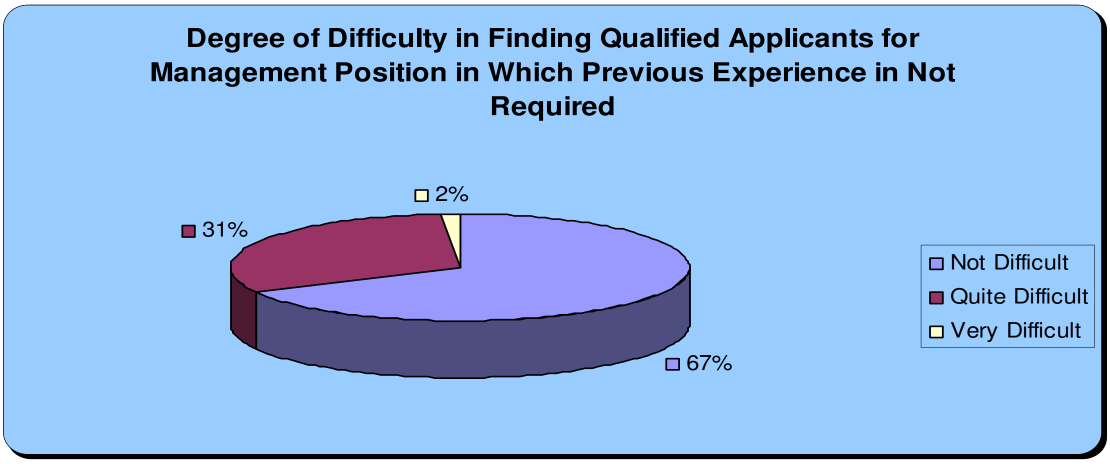
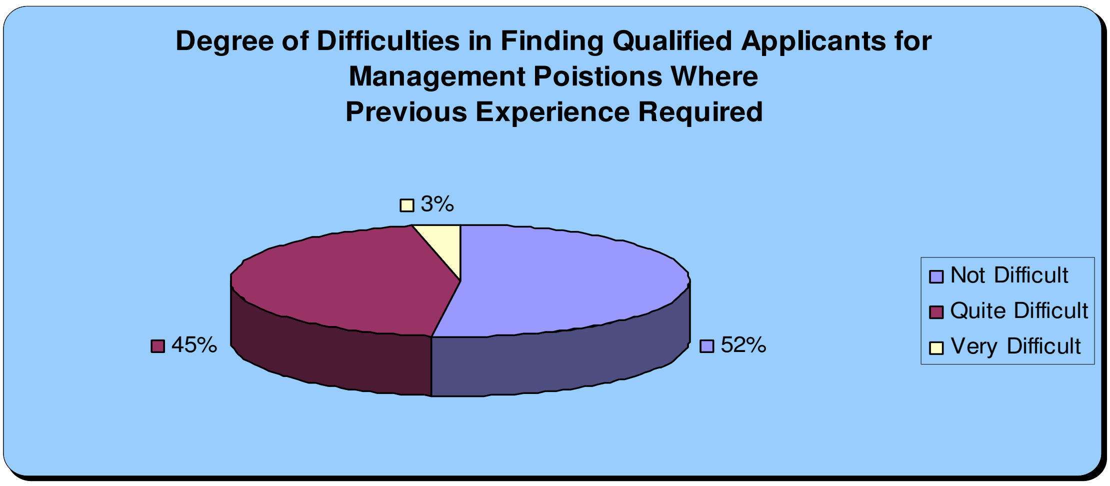


Chart 6c



The respondents responded the difficulties in finding qualified applicants for management positions with previous experiences, for management positions without previous experiences, non-management positions with previous experiences, and for non-management positions without previous experiences.

The respondents' answers were categorized in the following three options:
Not difficult (easy to be found),
Quite difficult (Not easy to be found), and
Very difficult (Not found at all).

The charts 6a, 6b, 6c and 6d represent degree of difficulties based on positions and previous experiences in finding qualified applicants. 2% respondents stated that finding qualified applicants for management positions with previous experience, management positions without previous experience, and non-management positions with previous experiences are "very difficult". 3% respondents stated that finding qualified applicants for management position with previous experiences are “very difficult”.

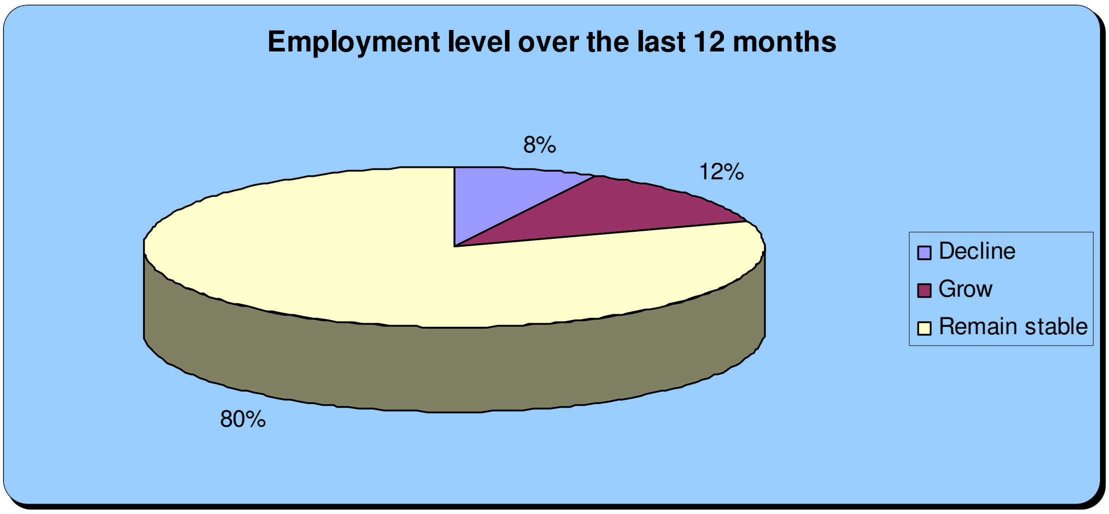
54% respondents stated that finding qualified applicants for non-management position with previous experiences are "quite difficult" and 45% respondents stated that find qualified applicants for management positions with previous experiences “quite difficult”.

67% of the respondents stated that finding qualified applicants for non-management position with previous experience is “not difficult” and 60% respondents stated that finding qualified applicants with previous experiences are “not difficult”.

As a result, filling vacancies in management positions where previous experience is required is difficult.

1.8 Employment level over the last 12 months

Chart 7

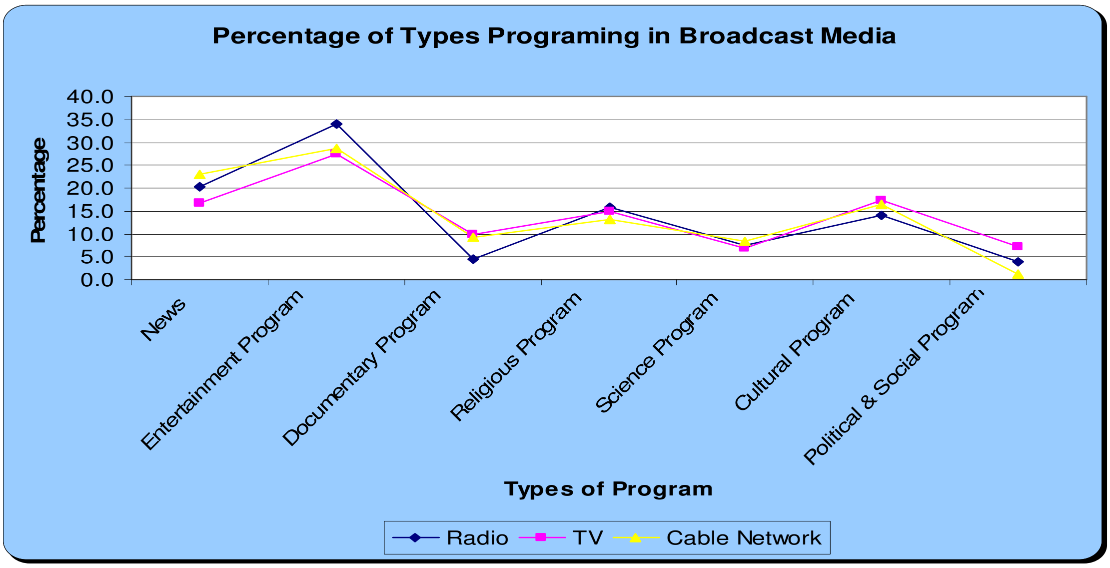


The chart 7 illustrates that 80% of the respondents stated that employment rate remained stable, 12% stated grow up in employment, and 8% stated decline in the last 12 months. The employment decline was mostly observed in print media i.e. in newspapers and magazines and grow up was experienced in broadcast media, especially in TV sector.

The average of decline in employment level 17% and grow rate was reported 18% in the employment level of grow in media sector.

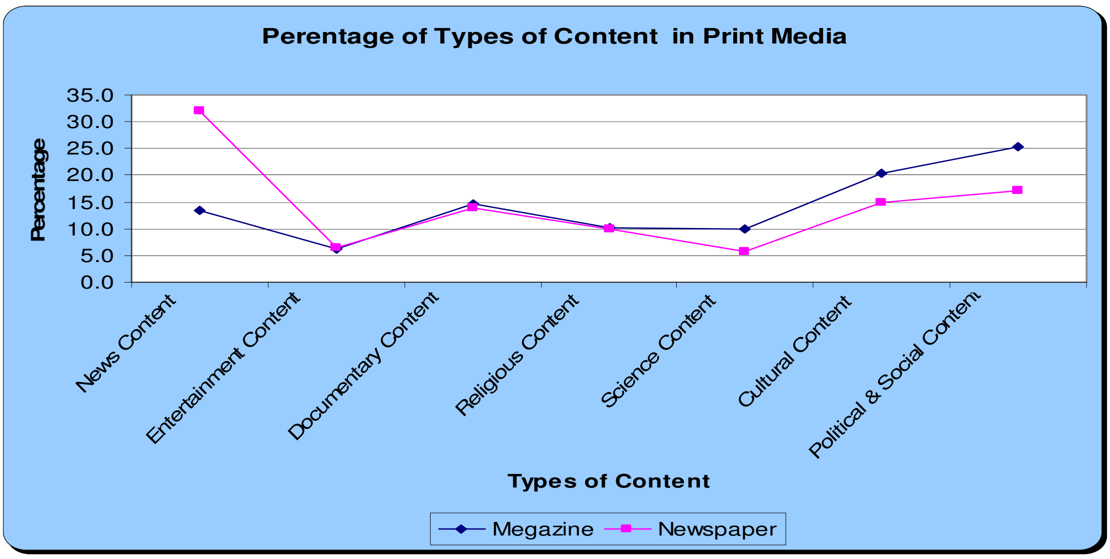
1.9 Percentage of Programming in Broadcast Media

Chart 8



1.10 Percentage of contents/Articles in Print Media

Chart 8a



In the media sector, the study focus was put on the 7 main programmes of Entertainment, News, Documentary, Religious, Science, Cultural, Political, and Social. These programmes were divided into print and broadcast media.

The chart 8 shows that 35% entertainment and 20% news were identified as main programmes in broadcast media.

The chart 8a represents 33% news contents/articles in newspaper, 17% news contents in magazines, 25% political and social contents in magazines, and 17% political and social contents in newspaper are main contents/articles in print media.

1.11 Source of finance in media sector

Chart 9

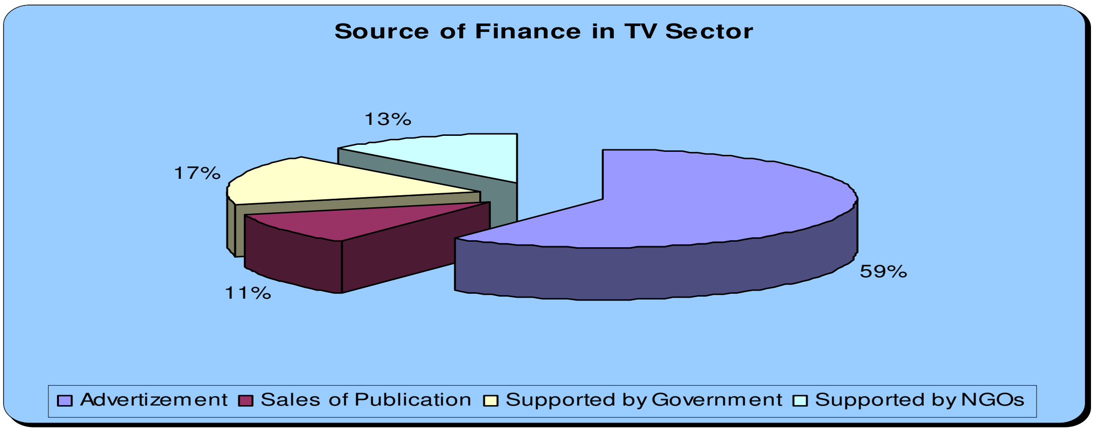


Chart 9a

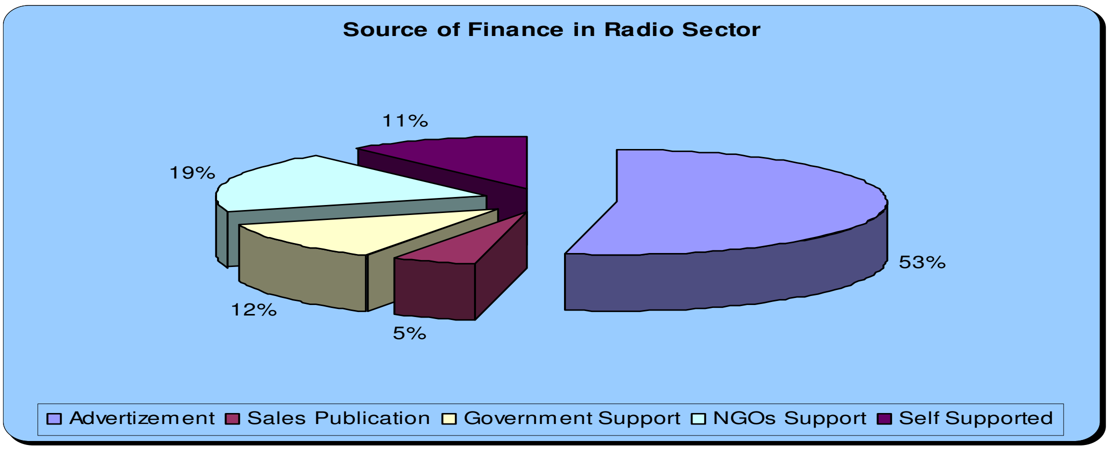


Chart 9b

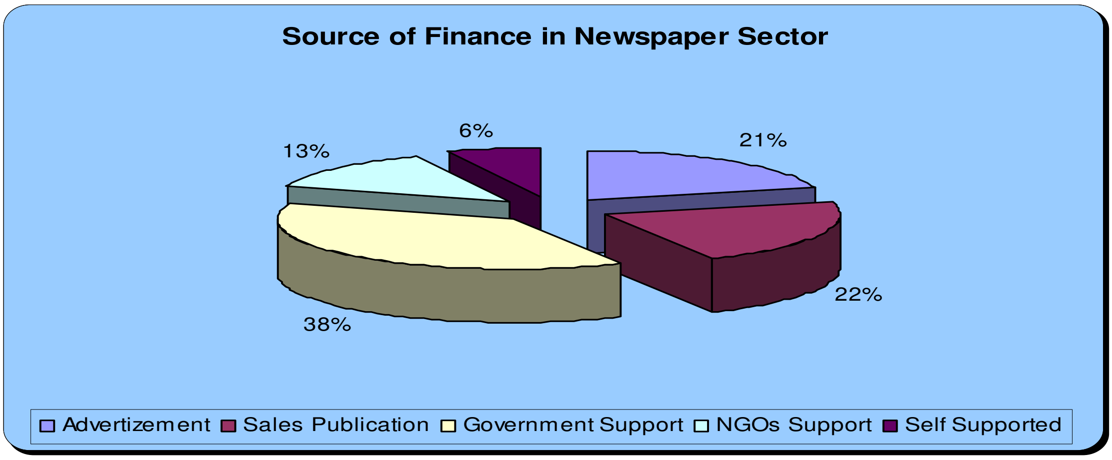


Chart 9c

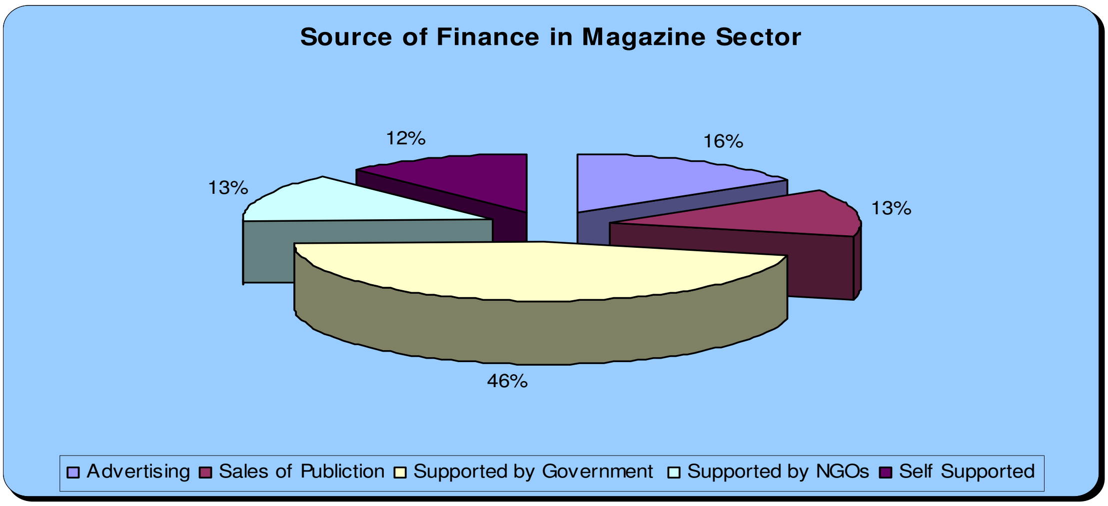
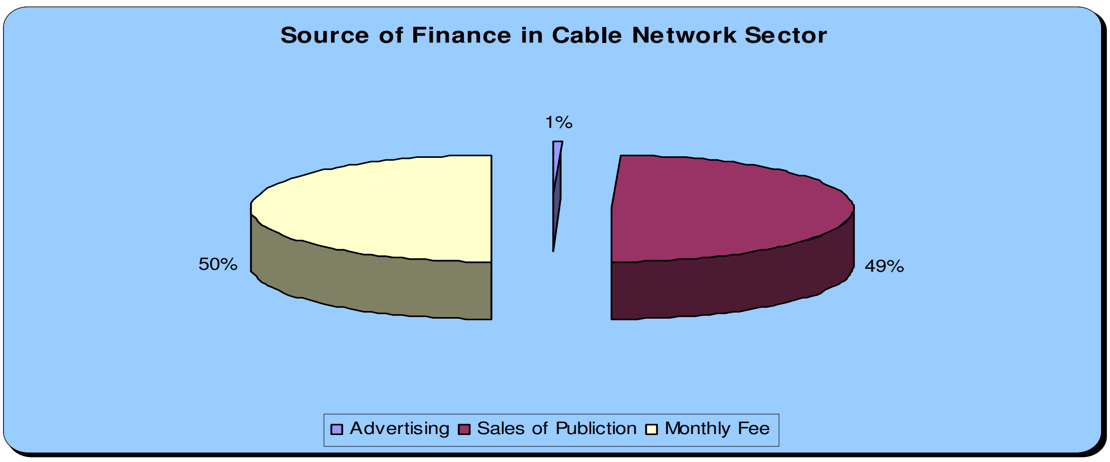


Chart 9d



The main source of finance in media sector comes from advertisements, Sale of publications, government, NGOs, and from self support.

The sale of publication in TV and Radio sector refers to the sale of documentaries, entertainments, and other similar programmes products inside and outside Afghanistan. The sale of publications in print media means sales of newspapers and magazines.

The cable network broadcast sales either its own programmes and of other televisions. Mostly, network broadcasting feature movies, sport news, and off-net television shows[5]. Therefore the sale of publications refers to off-net television shows.
50% finance of cable network comes from subscribers monthly fee, 49% comes from sale of publications, and 1% from advertisements.

The charts 8 and 8a show that the TV and radio sectors are financially running a like. 59% financial source of TV sector comes from advertisements and 53% of the radio sector. 17% TV sector and 12% radio sector is financially supported by the government.

In general, 13% finance support of TV and 19% of radio sectors come from NGOs. 11% financial support of TV and 5% financial support of radio sector come from sale of publications.

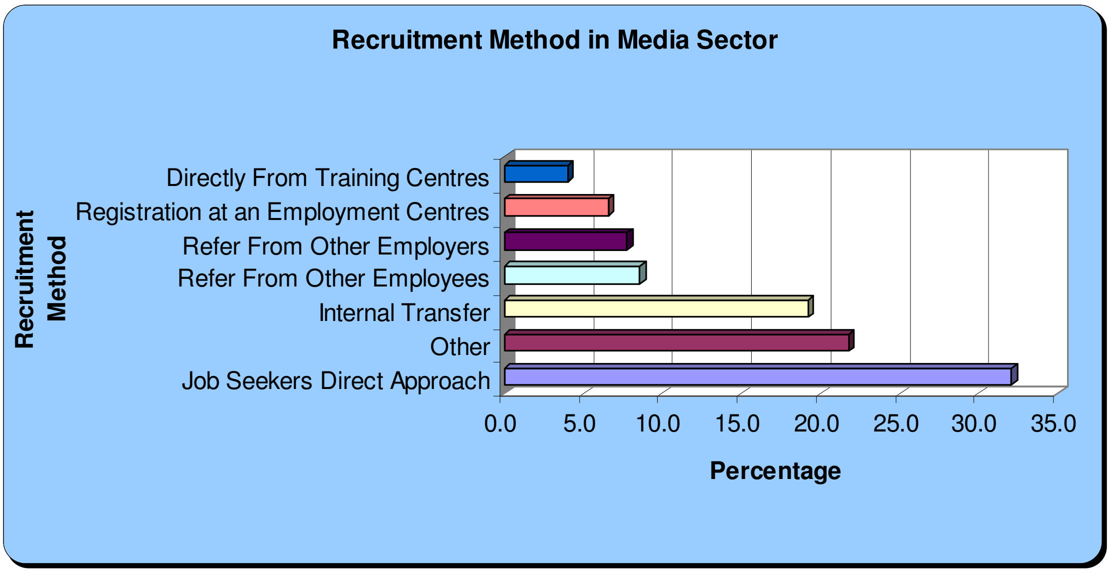
The charts 8b and 8c represent financial support in print media. 38% financial support of newspaper and 46% of the magazines was provided by the government. 22% financial support of newspaper comes from sale of publications and 21% comes from advertisements.

13% financial support of newspapers and 13% financial support of magazines come from NGOs and 6% financial support of newspapers and 12% of magazines come from self support. It is worth-mentioning that most of the self financial support comes from direct or indirect political parties, religious groups; foreign countries mutual benefit for future dreams, and newly start up investment of private companies.

[5] Off – net television shows means that where a T.V broadcasts its programmes through cable network without having a base in a particular location.

1.12 Recruitment method in Media sector

Chart 10

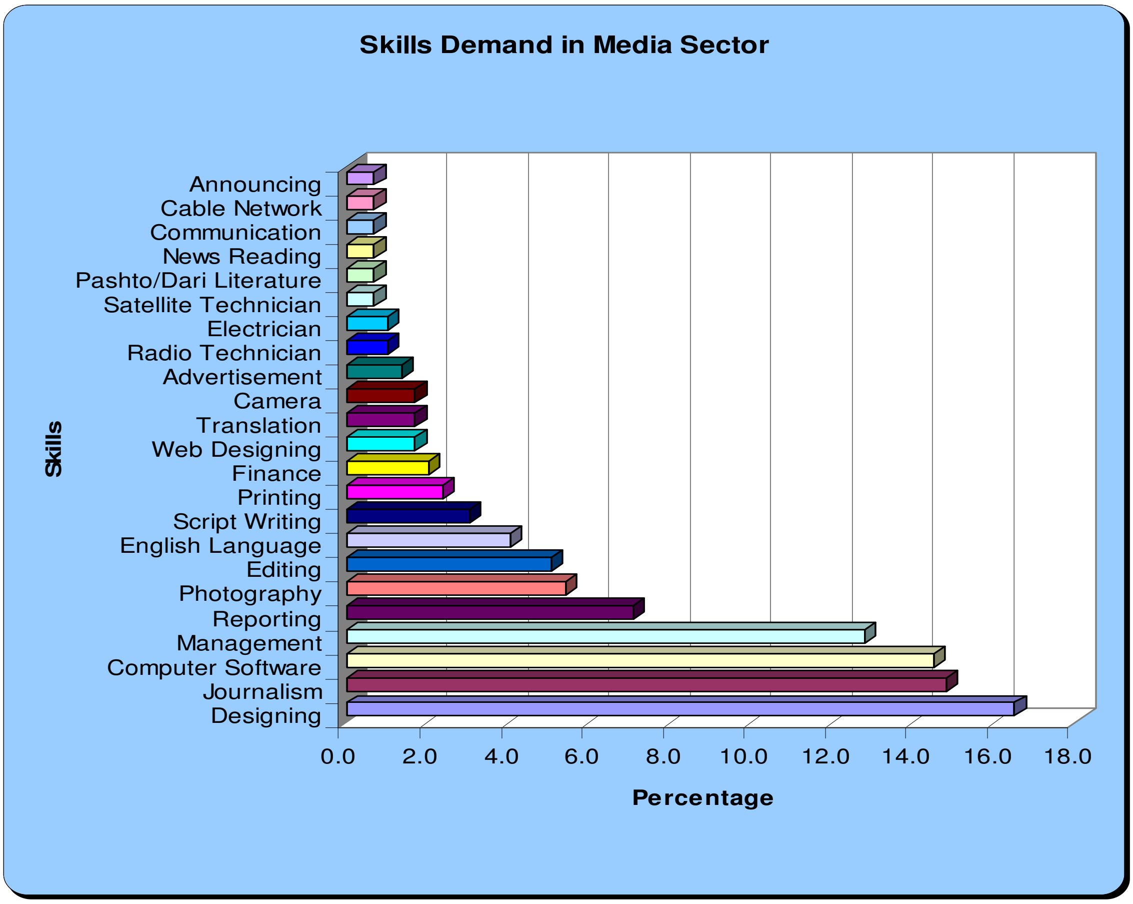


32.5% respondent employers claimed that they fill vacancies through Job seeker direct approach and 22% said they fill vacancies though TV and radio announcements. Vacancies in public manage print media are filled by introducing people from relevant ministries.

19% vacancies fill through internal transfer, 8% filled through introducing by the other employees, 7.5% by other employers, 6.5% through registration an employment services centers, and 4.5% comes directly from training centers.

1.13 Skills demand in Media Sector

Chart 11



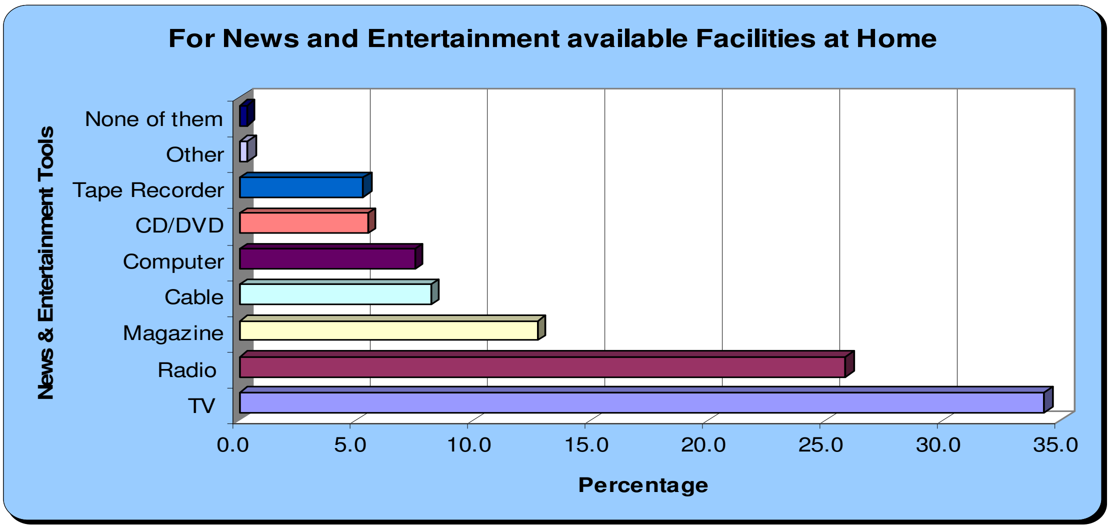
16.5 skills demand was for Designers, 14.2% for Computer Software Operators, 14.3% Journalists, 12.8% for Managers, 7.1% Reporters, and 3% Script Writers. In print media, 5% Photographers and 5% Editors and 4% English language speakers were the needed skills.

Section 1B

1.14 Media Opinion Poll

1.14.1 For news and entertainment available facilities at home

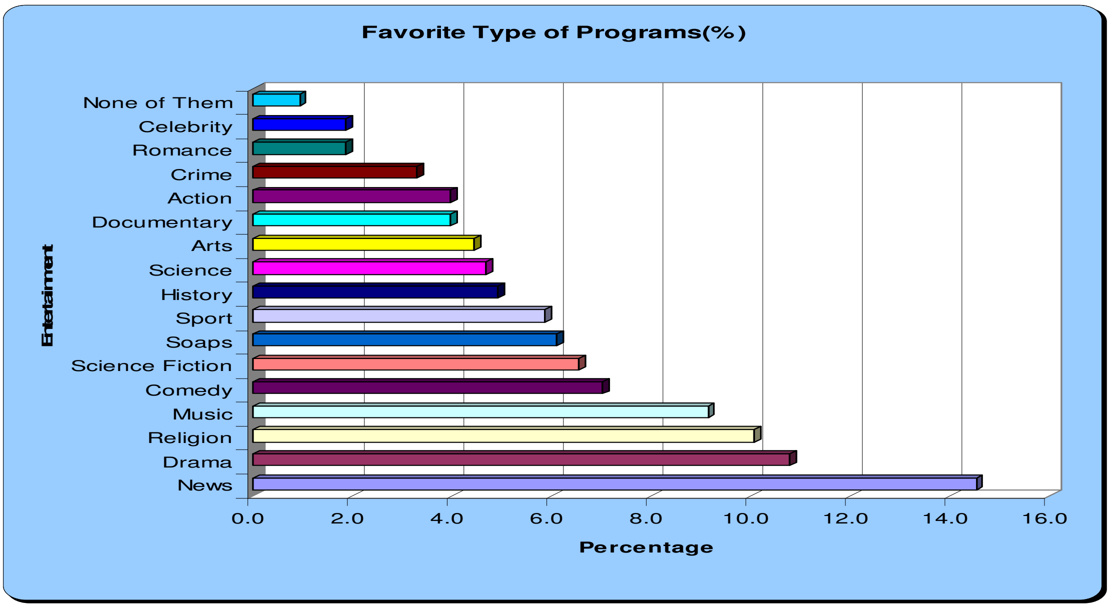
Chart 12



16% means of news and entertainments are TV, 11% Radio, 8% Magazine, and 1% reported that they have no access to news and entertainments means at homes. For provincial level data *(See Annex 1).*

1.14.2 Favourite programs

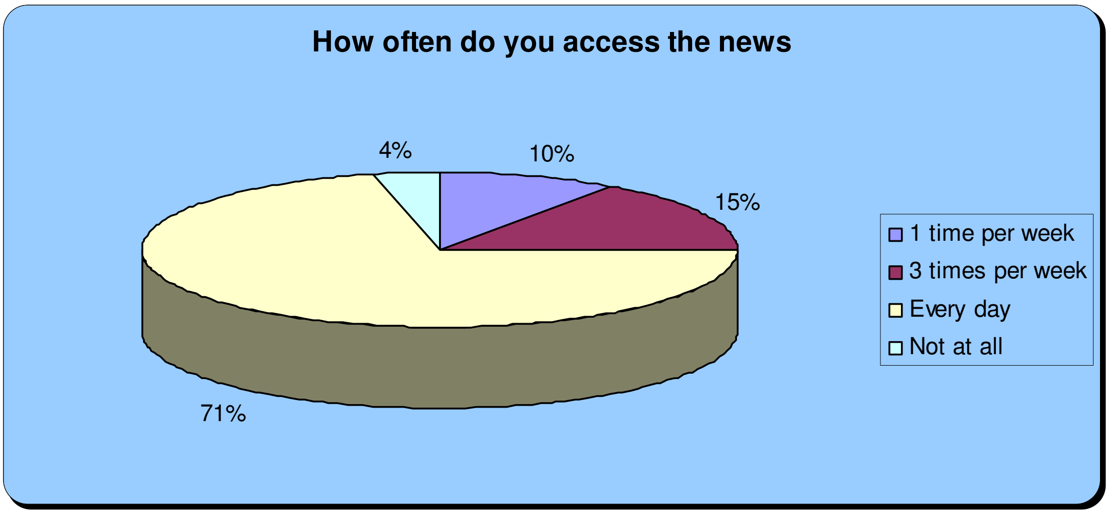
Chart 13



14% news as a source of information followed by 10.8% dramas, 10.1% religious programmes, and 9.1% music programmes were identified as a top favourite programmes. 0.9% of the respondents stated that they haven't interest in entertainment programmes. 1% of the respondents sated that they have no means for news and entertainments at their homes as shown in chart 11. For provincial level data *(See Annex 2)*

1.14.3 Time frequency for having access to news

Chart 14

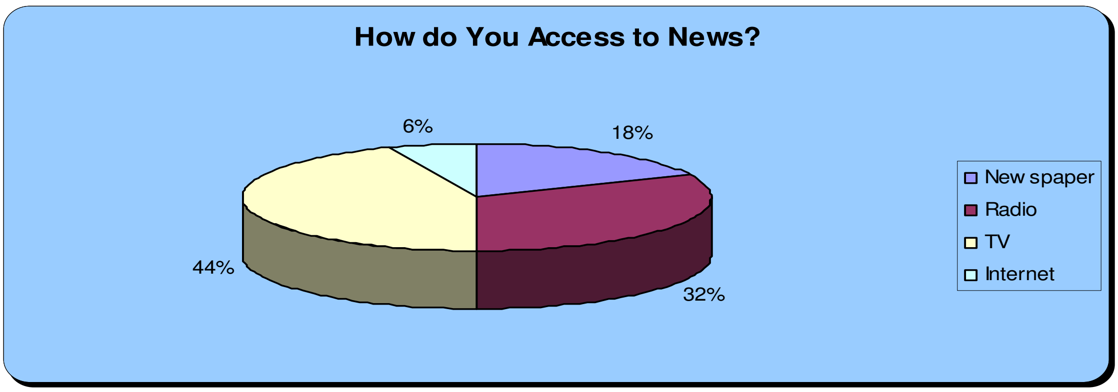


Over two third (71%) of the respondents stated that they have access to news every day, 15% reported they have access to news three times a week, the remaining 10% reported one time per week, and 4% stated that they haven't access to news at all.

Nangrahar has experienced the most predominant province having access to news every day. For provincial level data *(See Annex 3).*

1.14.4 Source of access to news

Chart 15

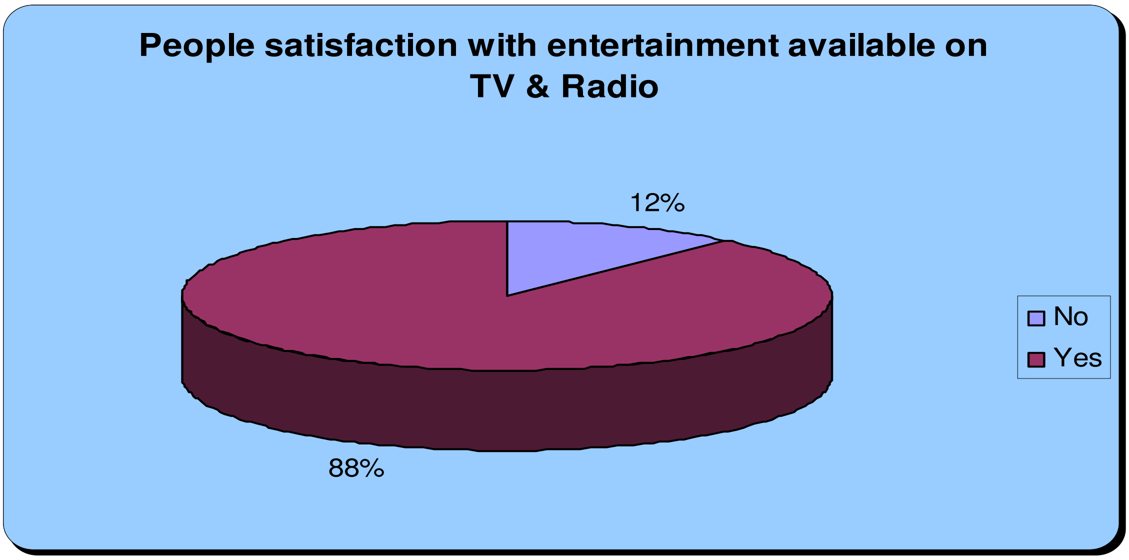


44% respondents reported that TV is the main source of news followed by 32% radio, and 18% Newspaper. In rural areas radio is the main source of news and information.

6% respondents stated that they have access to news through internet facility. It is confined to the group of people working in offices having access to internet facility. *(See Annex 4)*

1.14.5 Public satisfaction from entertainments on TV & Radio

Chart 16

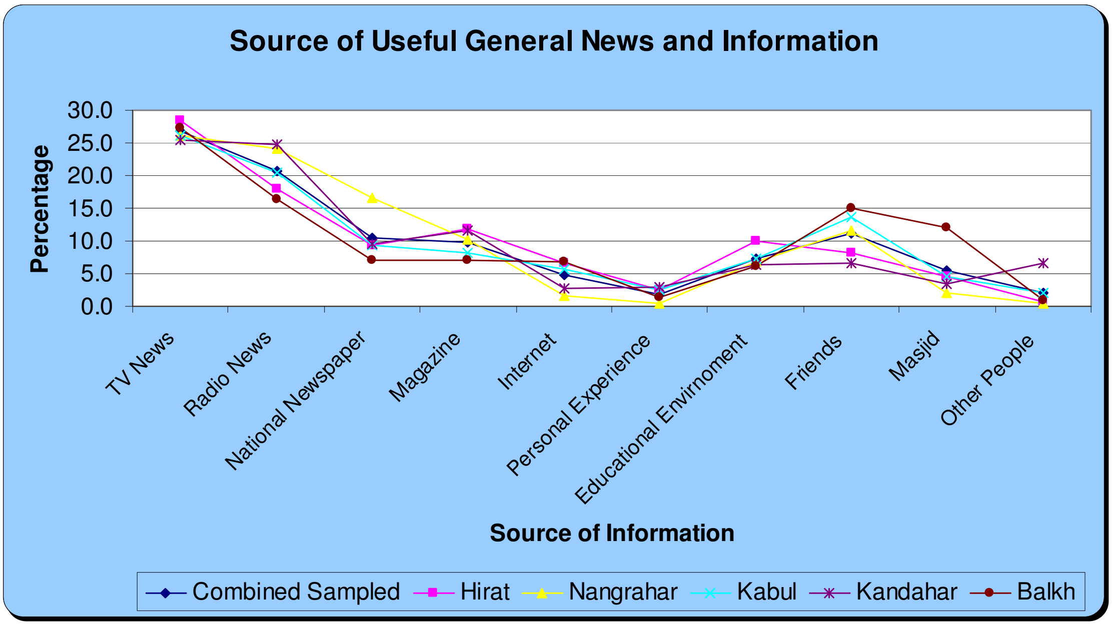


The above chart indicates that 88% people were satisfied with news entertainment on TV and Radio and the remaining 12% were not satisfied with news and entertainment on TV and Radio.

33.3% complained about lack of facts and reality and 13% suggested educational programs, 12% Islamic and cultural programmes, and 10% dramas. 19% suggested live broadcasts to avoid Indian serials affect on young generation and some emphasized to stop using foreign words and expressions that affect our local languages.

1.14.6 Source of general news and information

Chart 17



26% respondents received general information and news from TV and 20.7% from radio. The radio seems as a main source of news and information (24.2%) in Nangrahar and 24.8% in Kandahar.

The 11.7% use of national newspaper was identified as a main source of general information and news in Nangrahar province. The same percentage (11.7) magazine was experienced in Kandahar and Heart provinces.

6.8% use of internet in Mazar-e-sharif, 6.6% in Herat, 1.7% in Nangrahar, and 2.7% in Kandahar was observed as a main source of news and general information.

11.2% respondents stated that they received general information and news from friends, which is the third main source of news and general information in the combined sample. In Mazar-e-sharif, 15.1% and in Kabul 13.7% people received the news and general information through friends, but in Kandahar only 6.7% people get news and general information from friends.

1.14.7 Time range for spending in mass media source

Chart 18

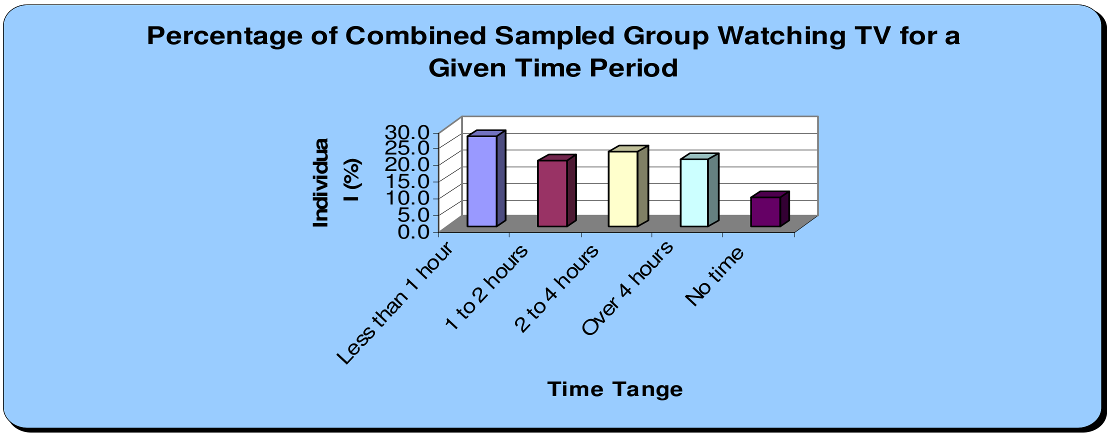


Chart 18a

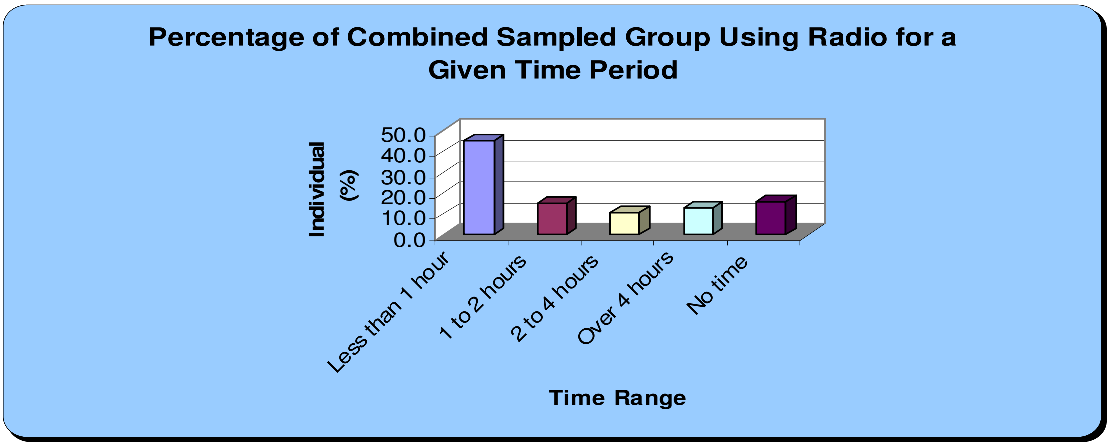


Chart 18b

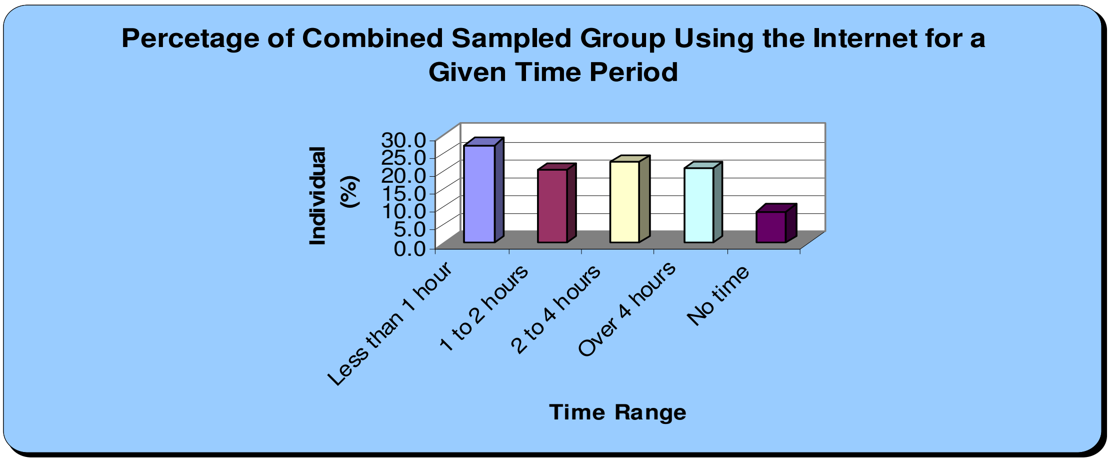


Chart 18c

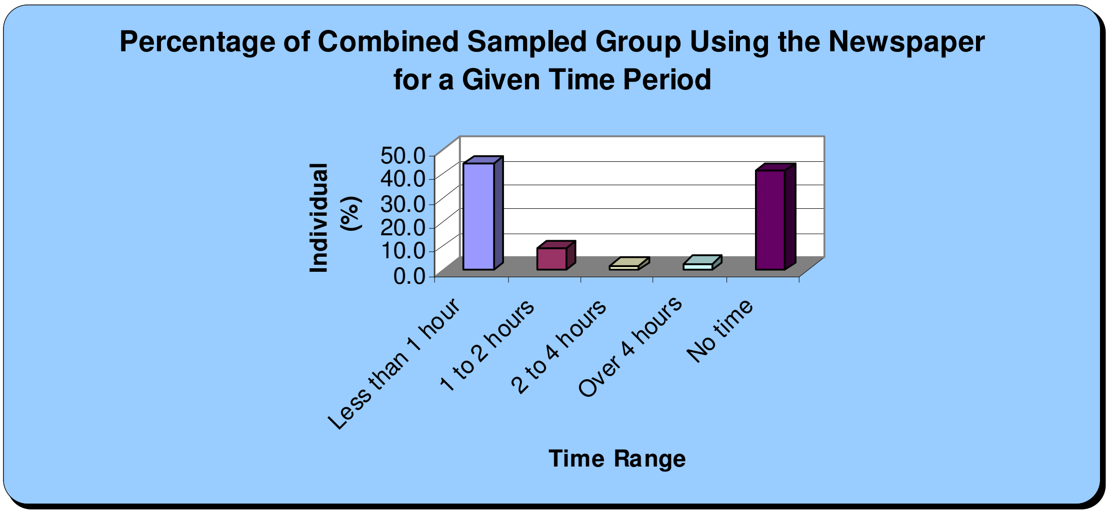
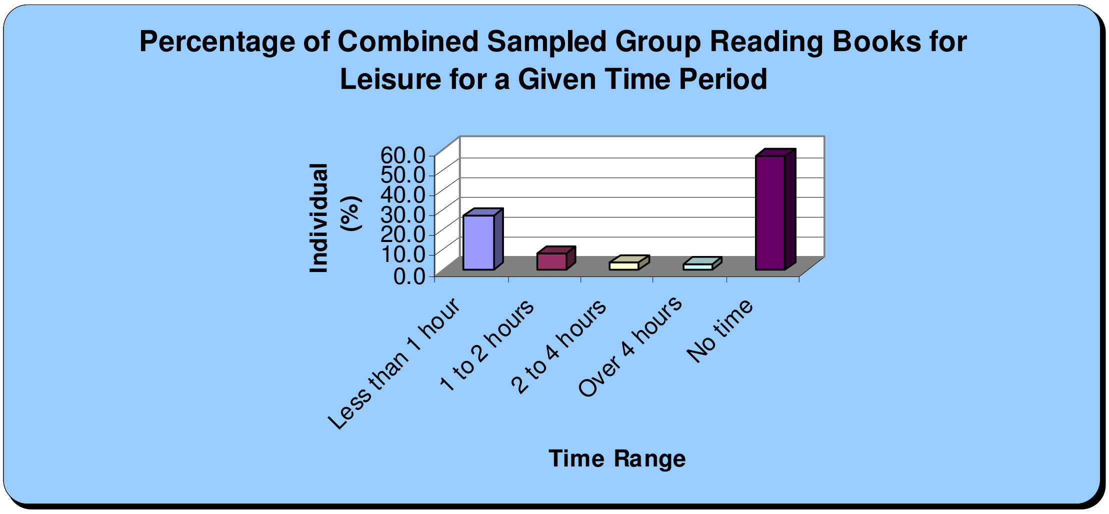


Chart 18d



27.4% respondents stated that they watch television less than 1 hour per day, 22.7% stated 2 to 4 hours per day, 8.9% stated that they do not watch television at all due to either having no access or not interested and 20.7% respondents watching television over 4 hours every day.

The chart 17a illustrates that 45% respondents listen to radio "less than 1 hour" and 16.2% do not listen to radio at all.

44.5% respondents reading newspapers "less than 1 hour" and 41.7% respondents do not read newspapers at all.

57.4% respondents give no time for reading books for leisure, 27.6% respondents read books for leisure "less than 1 hour". 74.6% respondents do not use internet at all and 14.4% use internet "less than 1 hour" per day.

The combined sample explains that 45% respondents listen to radio, 44.5% reading newspapers, and 27% reading books for leisure and watching television "less than 1 hour" per day.

1.14.8 Pubic assessments about media coverage of news and public issues

Chart 19

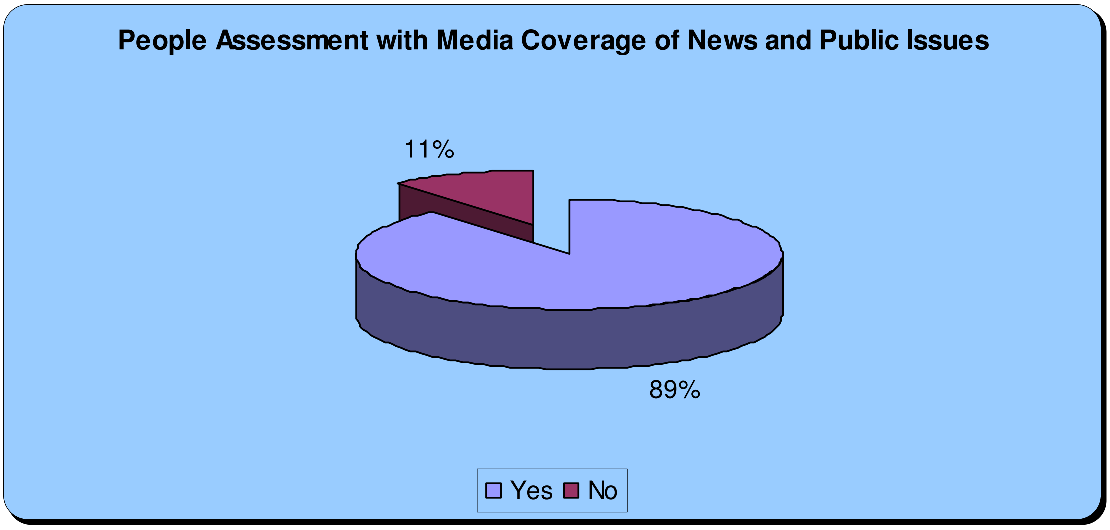


Chart 19 indicates that 89% respondents were satisfied with media coverage of news and public issues, and only (11%) were not satisfied with media coverage of public news.

The unsatisfied respondents with media coverage of news and public issues suggested that facts and realities should be reflected, news and public issues should be broadcasted on time, and using words and expressions of foreign languages within the national leagues should be avoided.

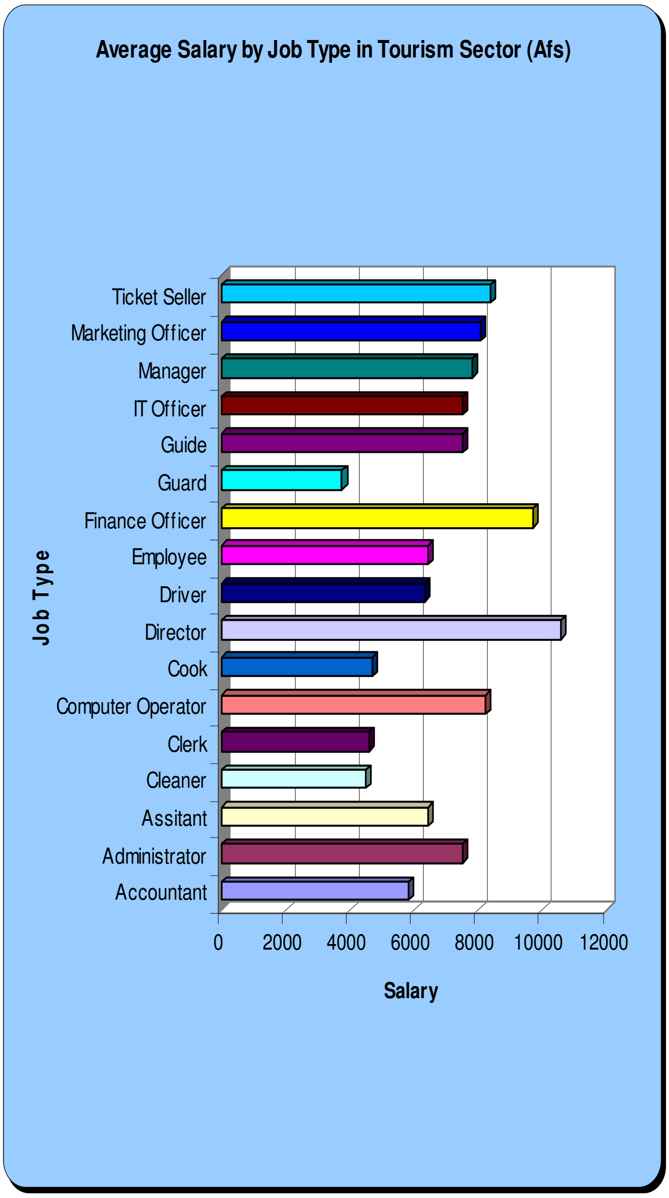
CHAPTER TWO

TRAVEL AND TOURISM SECTOR

1. *Travel Agencies and Tourist Companies*

2.1 Job distribution and average salary in tourism sector

Chart 20



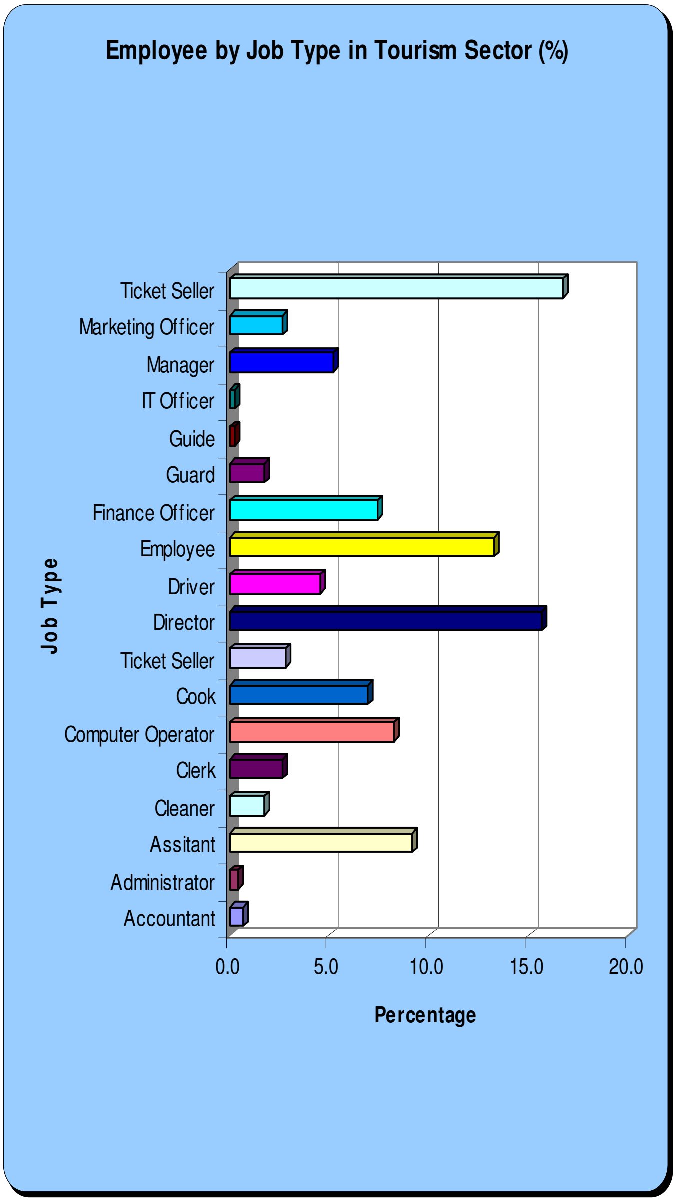


Chart 19 shows the occupational wage and percentage of employees by job type. As an average, the Director position receives Afs. 10,556 per month and Finance officers Afs. 9,722 identified in the high range of salaries. The Computer Operator, Marketing Officer and Ticket Seller are paid Afs. 8,000 per month and considered in the second category of the salaries range. Guards, Clerks, Cleaners, and Cook were identified in the lowest range of salaries with Afs. 4,000 per month and their percentage by job type is also lowest in this sector.

16.7% employees by job type were Ticket Sellers, 15% Directors, 13% Officers, 9.1% Assistants, and 8.2% Computer Operators were identified as main employment level by job type.

The directors, computer operators, and ticket sellers were identified with high salary range and high percentage employment by job type. The marketing officers with high salary and low percentage by job type were identified.

In addition, guides, guards, clerks, cleaner, and accountants were identified with low salary range as well as low employment level by job type in travel and tourism sector.

2.2 Employment by gender and nationality

Chart 21

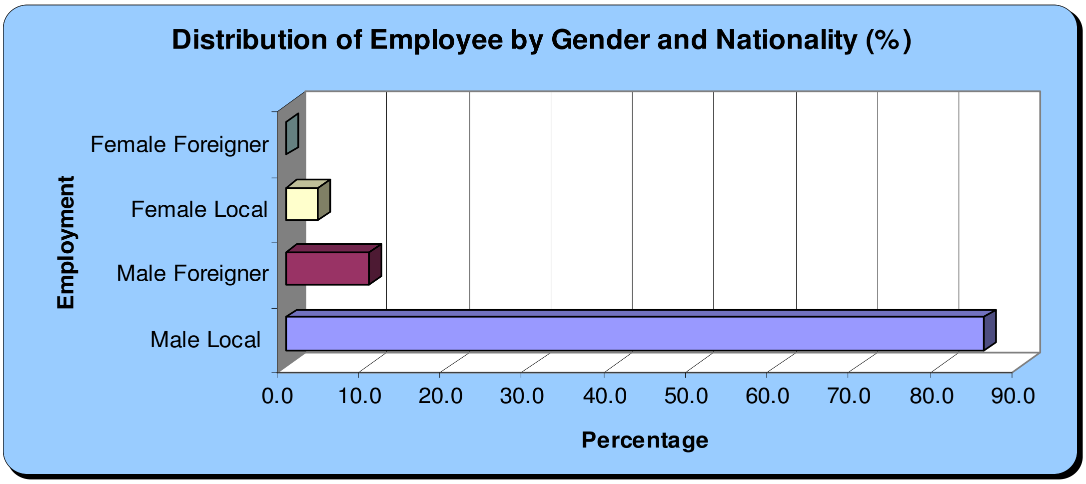
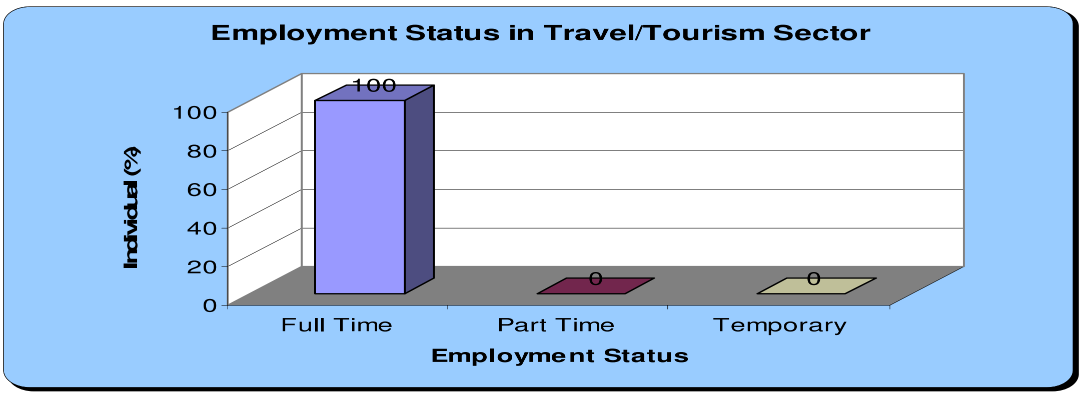


Chart 22



85% employment level in this sector is covered by male locals and 9% female locals, while the remaining 4% is covered male and female foreigners.

The char 22 explains that all employment status covers full time employment. Part time and temporary employment status was reported nil.

2.3 Employment level over the last 12 months in

Chart 23

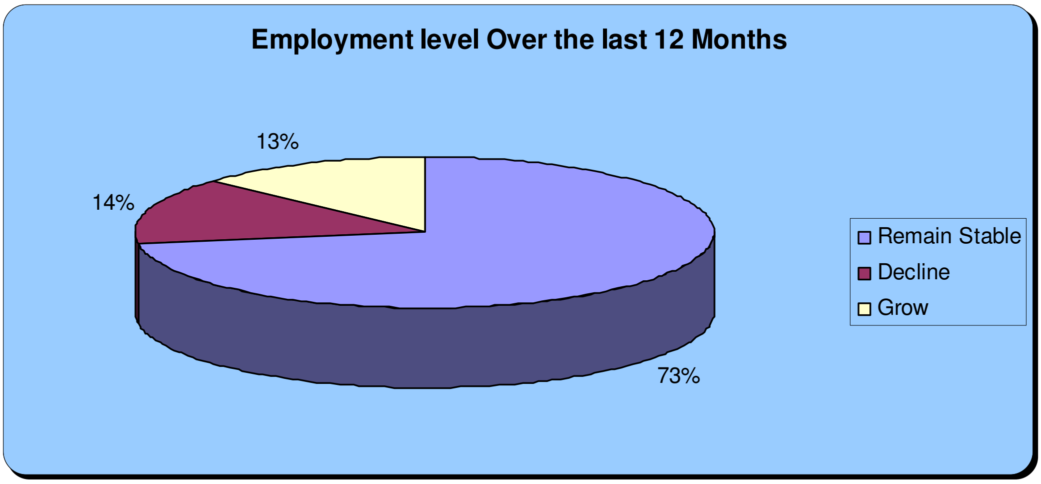


Chart 23 shows that 73% of the employers claimed that employment level in their businesses remained stable in the last 12 months.

16% of the respondents stated that their employment level has declined and 12% respondents stated that their employment level has grown in the last 12 months.

The average of decline in employment level 34.4% and grow rate was reported 39.3% in the employment level of grow in travel/Tourism sector.

2.4 Degree of difficulty in finding qualified applicants

Chart 24

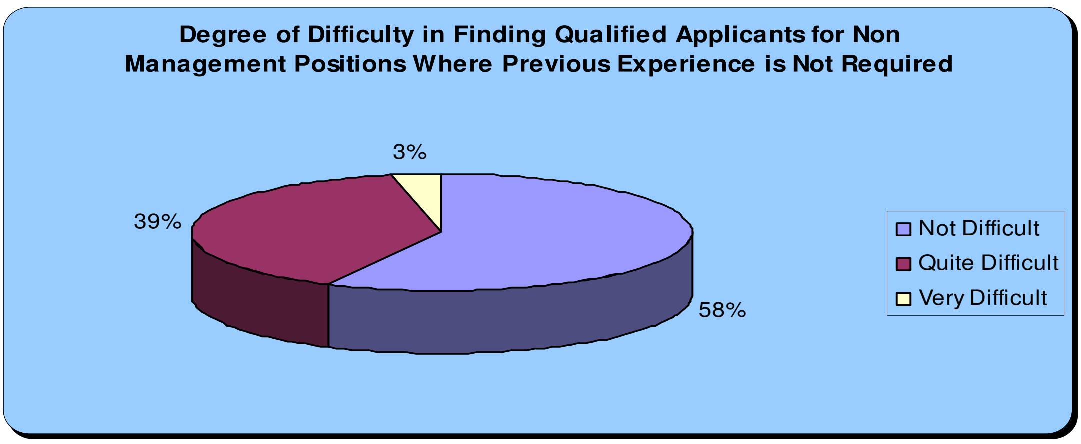


Chart 24a

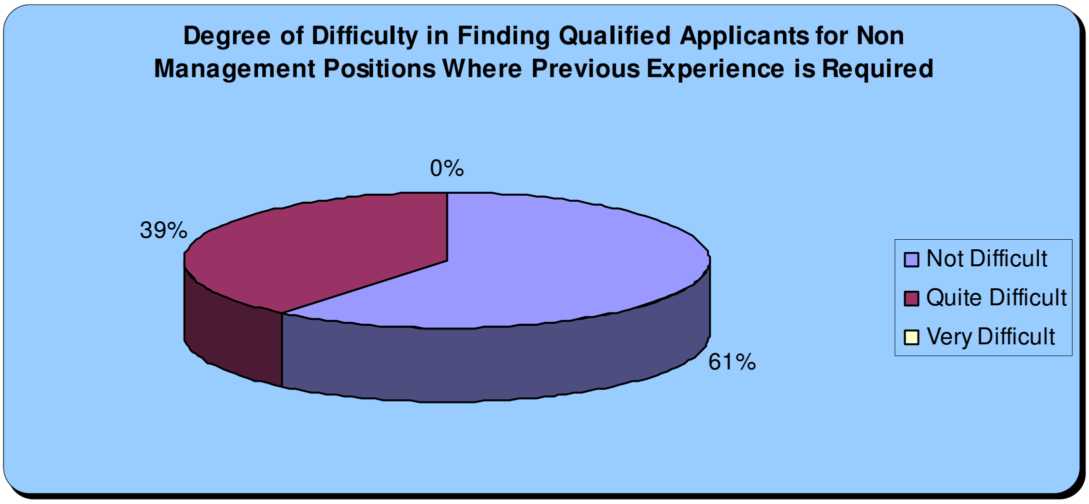


Chart 24b

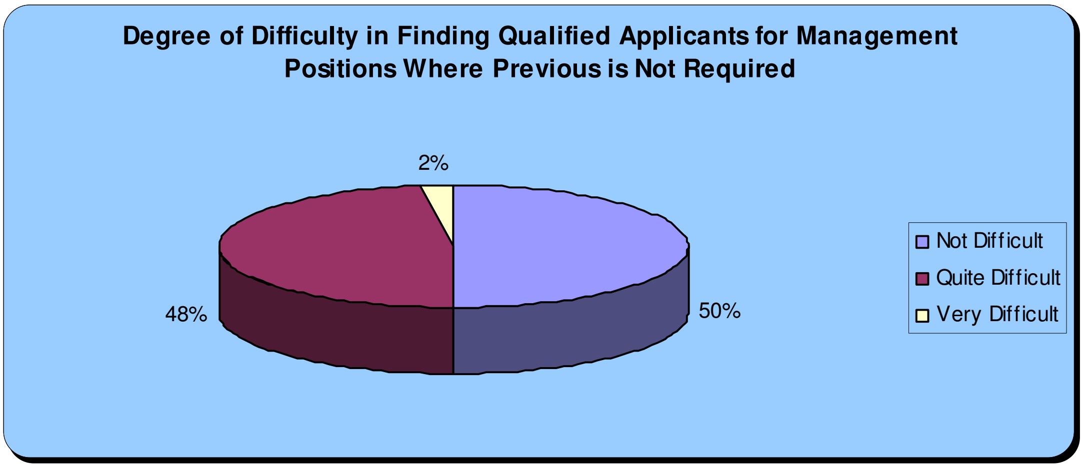
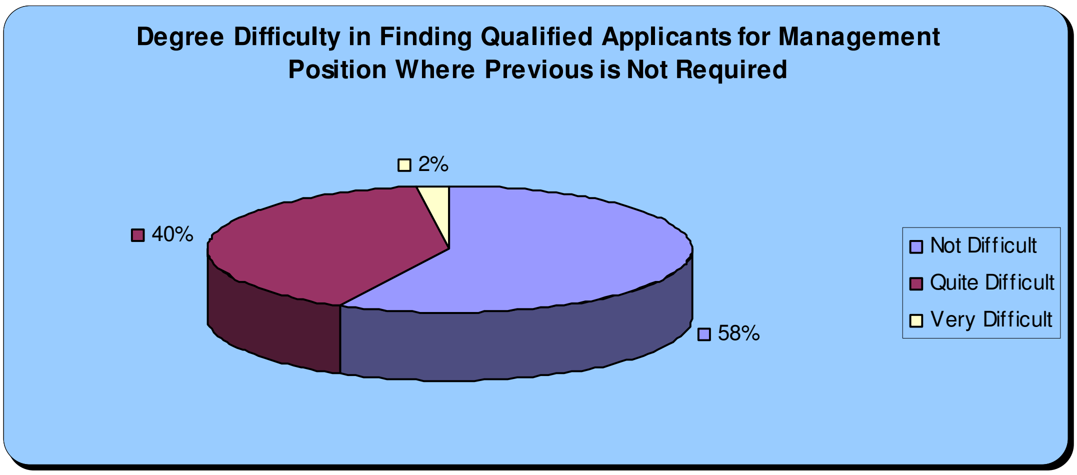


Chart 24c



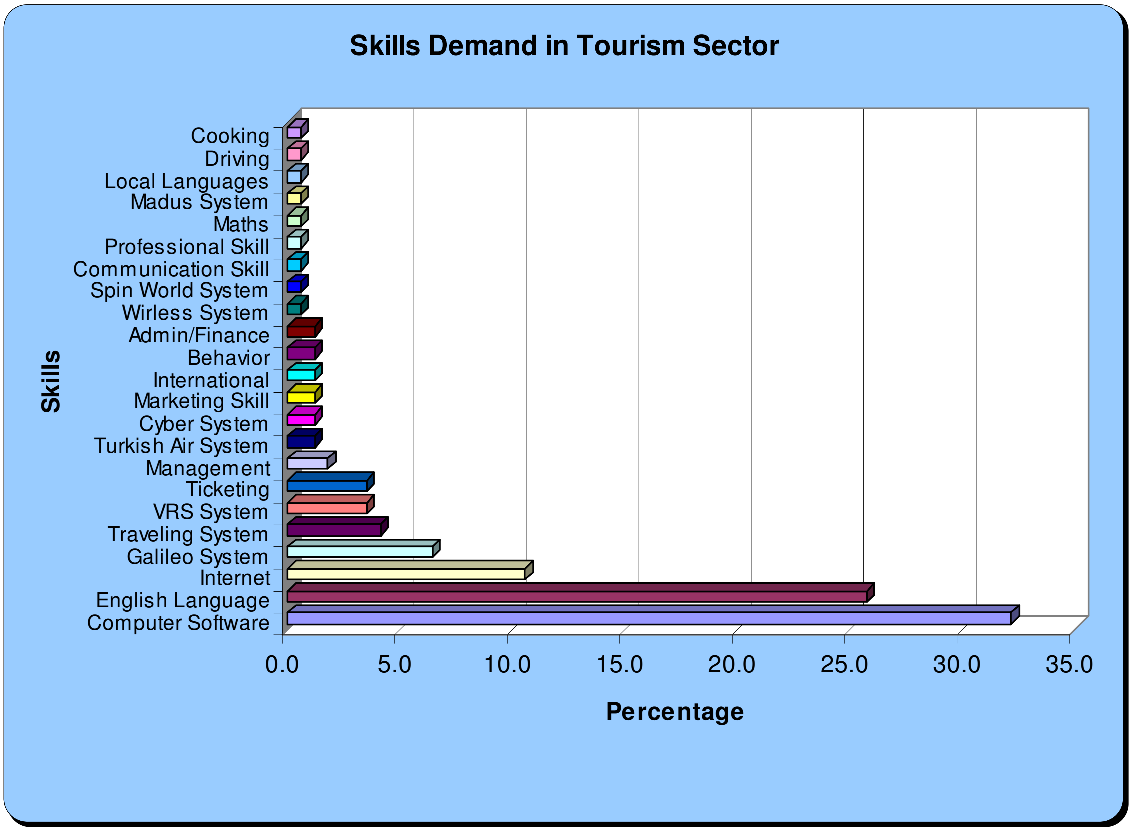
39% respondents said that finding of qualified and experienced applicants in non-management positions without previous experiences and 39% non-management positions with previous experiences (48%) management positions without previous experiences and (40%) management positions with previous experiences identified “Quite difficult”.

Chart 21, 21a and 21b show that around 3% of the employers considered finding qualified applicant "Very difficult" and over 50% of the employers considered finding qualified applicants for non management position with previous experience “Not difficult” for them.

As a result, finding qualified applicants for management positions were identified “Quite difficult”.

2.5 Skills demand in tourism sector

Chart 25

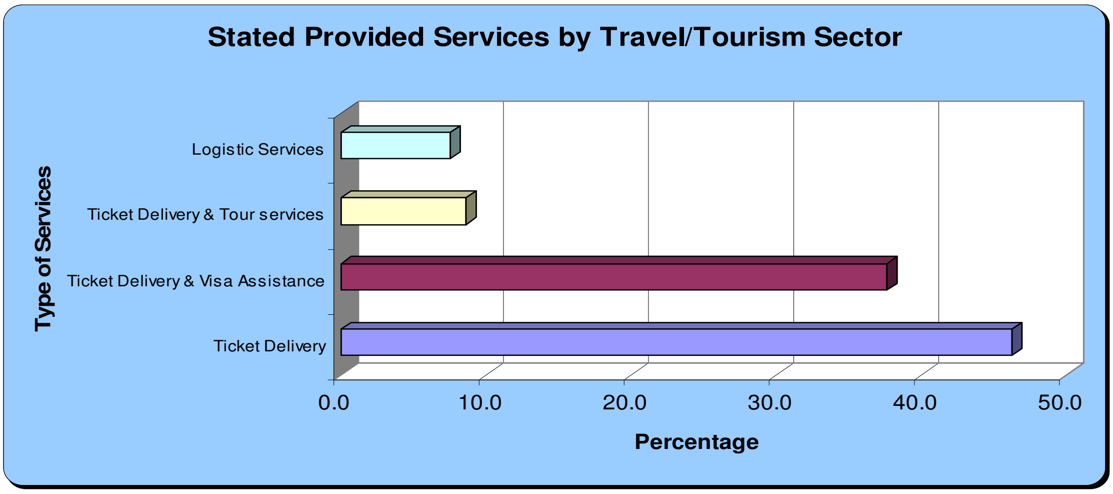


In the travel and tourism sector employers demanded for employees to have knowledge in one of the 25 skill areas. The most demanded skills were 32% Computer Software users, 25.3% English language speakers, 10% Internet users, 6% Galileo System users, and 3.2% VRS (Visitor Registration System) users.

The most dominated skill in travel/tourism sector is Galileo System[6]. It is mostly used in advanced countries. The Galileo System skill covers the remaining Modus, Turkish Air, Cyber[7], and VRS systems[8].

2.6 Travel/Tourism Sector Services

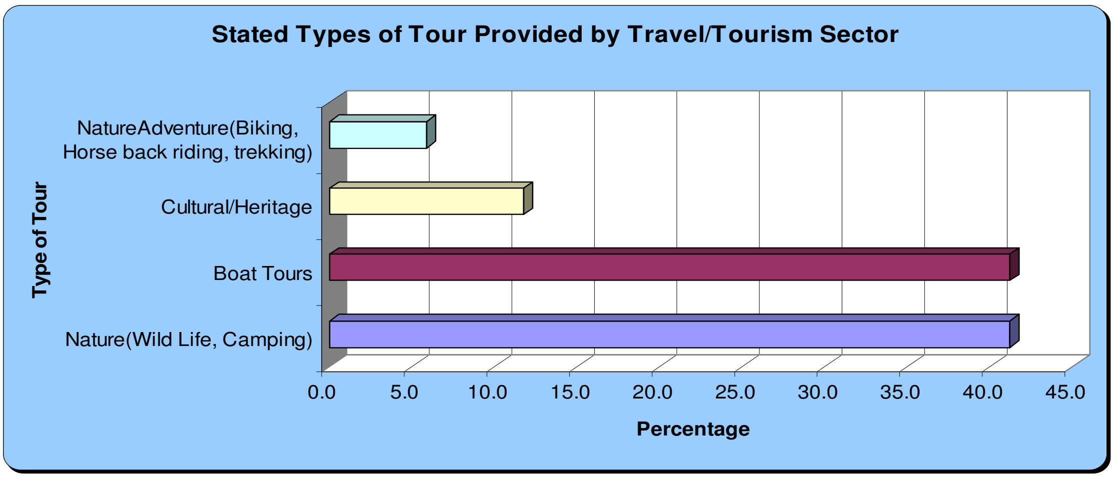
Chart 26



46.5% travel/tourism sector respondents provide only ticket delivery services, 37% ticket delivery & visa assistance, 8.5% ticket delivery/tour services, and 8% provide logistic services.

2.7 Tourist company/travel agencies

Chart 27

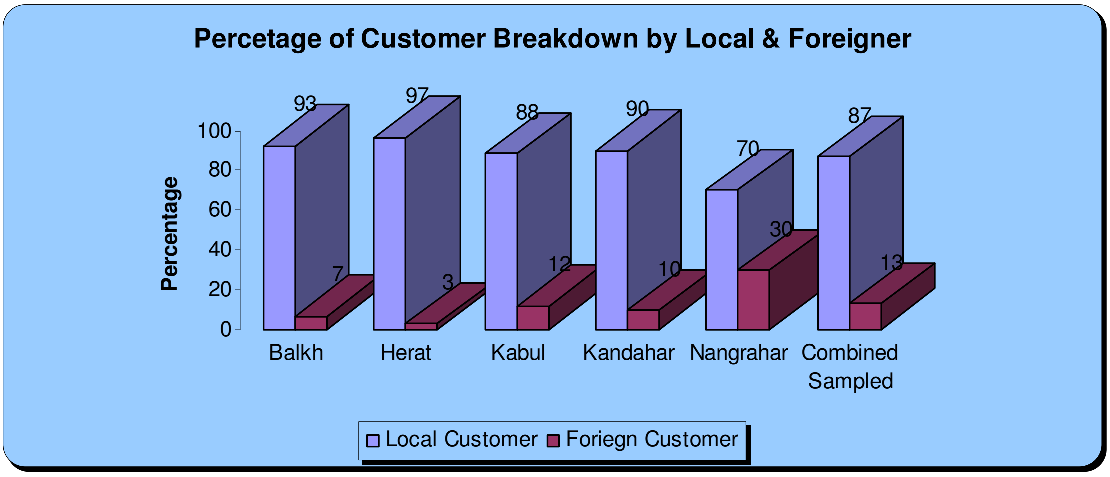


[6] Galileo system is a database used for electronic ticketing.
[7] Cyber System is a database used for electronic ticketing.
[8] VRS is a database used for quick booking and arranging ticket.

The travel and travel companies provide 41% nature (wild life camping), 41% boat tours, 12% cultural/ heritage, and 4% nature adventure (biking, horse back riding, trekking).

2.8 Percentage of Local and Foreign Customers

Chart 28



2.9 Average Customer Served per Year.

Chart 29

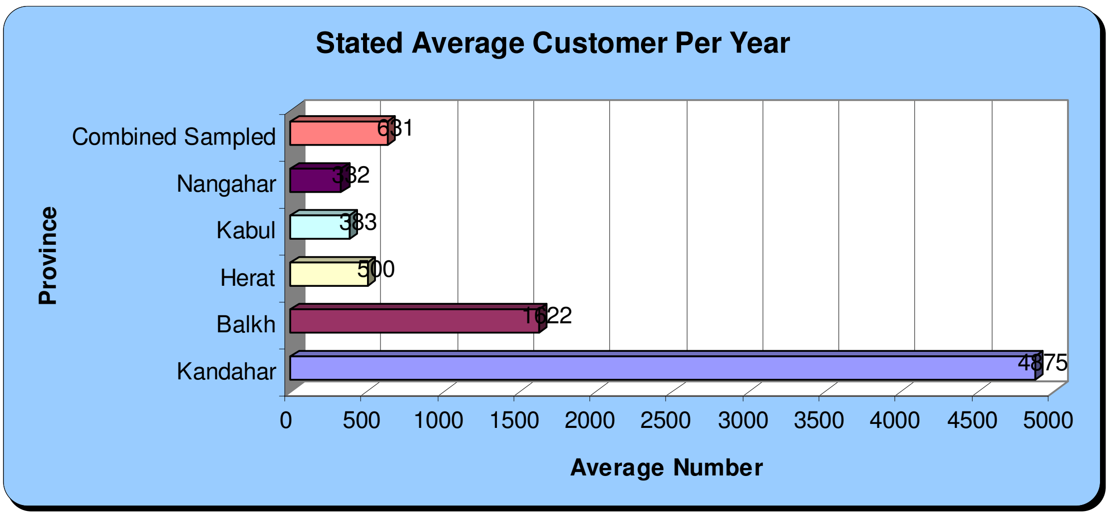


Chart 29 shows the number of annual customers in travel and tourism sector in the five targeted provinces. In Nangrahar, the number of customers 382, in Kabul 383, in Herat 500, in Balkh 1,622, and in Kandahar 4,875 persons.

The undercount number of customers in the travel and tourism sector might be linked to the fear of annual revenue to employers. The NSDP supervisors re-checked the low number of customers per year with some of the agencies and found that the lowest annual customers were about 1,000 and the highest number 5,000 in the sector.

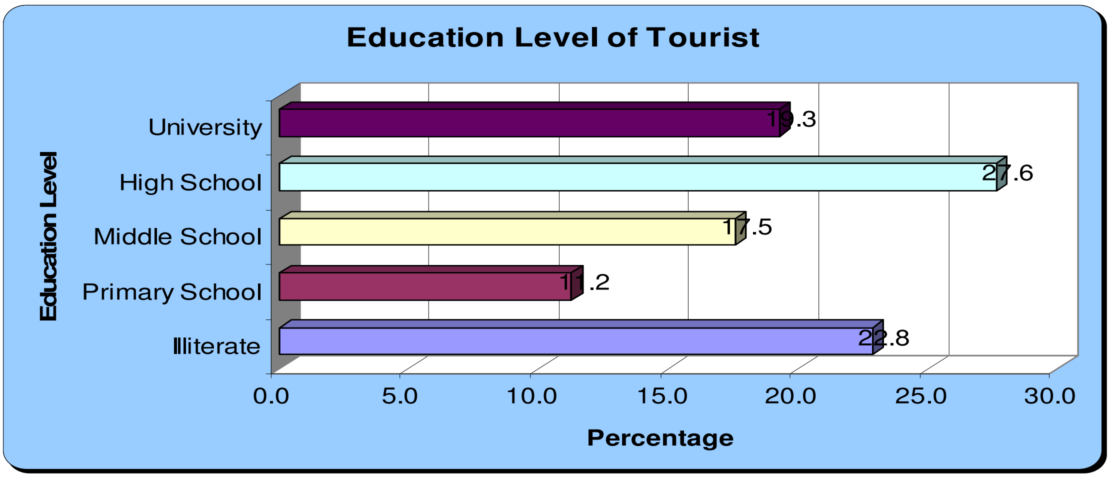
Section 2B

Tourist Opinion Poll

This section represents assessment of visitors in the five targeted provinces.

2.9.1 Tourists Education Profile

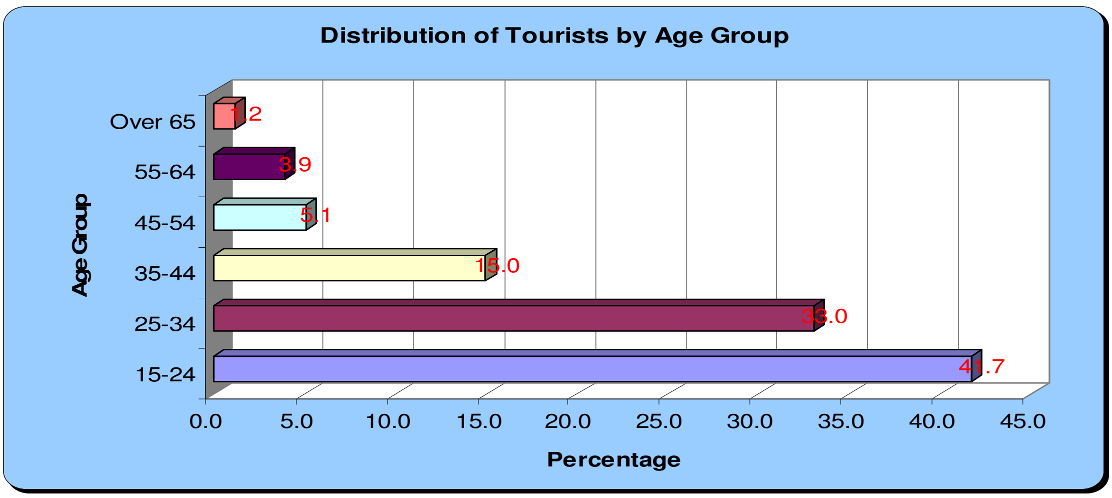
Chart 30



Over two-third (77.2%) of the respondent visitors had formal education. Out of them 27.6% respondents on tourist spots were high school graduates, 19.3% university graduates, 17.5% middle school, and 11.2% primary school students. The remaining 22.8% were identified illiterates.

2.9.2 Tourists by age group

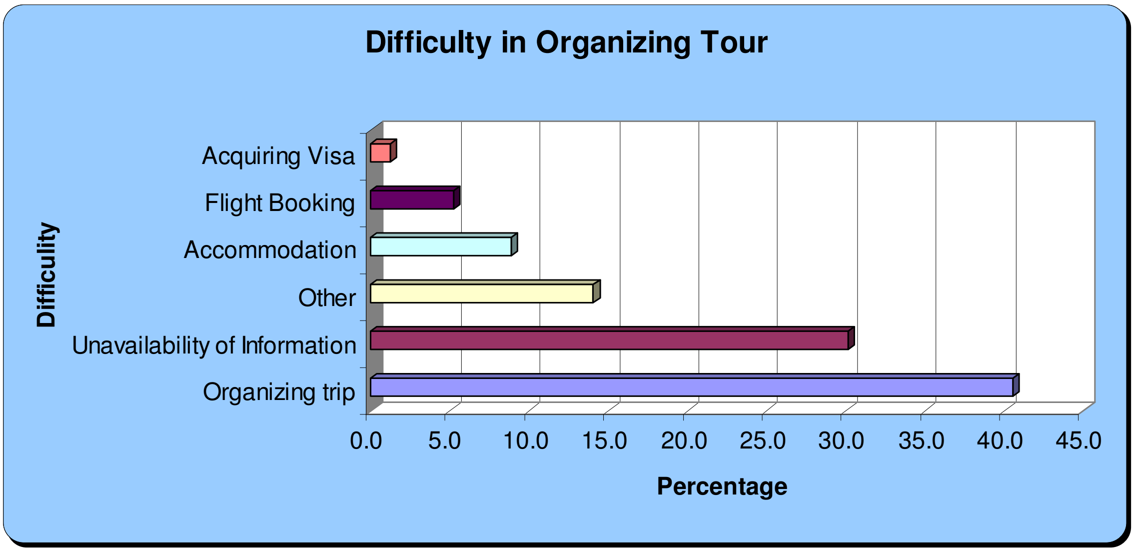
Chart 31



The chart 31 shows that the age group of 15-24 showed 41.7% reflected more interest in tours, the age holders of 25-34 showed 33% interest in tours, the age group of 35-44 showed 15% interest, and group of age over 45 showed 10.2% for tours.

2.9.3 Difficulties in organizing tours

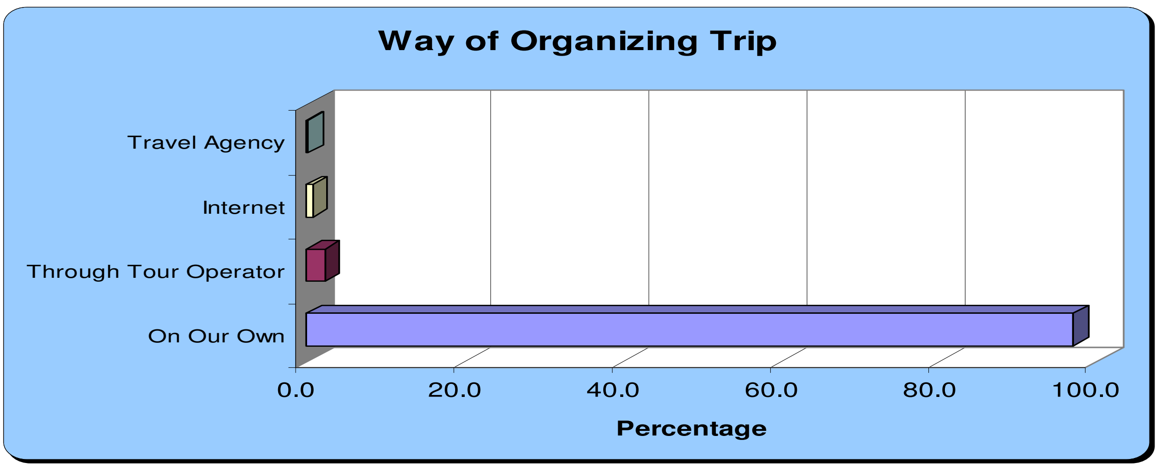
Chart 32



40% respondents mentioned difficulties in organizing trips, 29.5% mentioned unavailability of information, and the rest 30.5% mentioned, flight booking accommodation facilities, acquiring visa, insecurity, and traffic problems.

2.9.3 Way of organizing trip

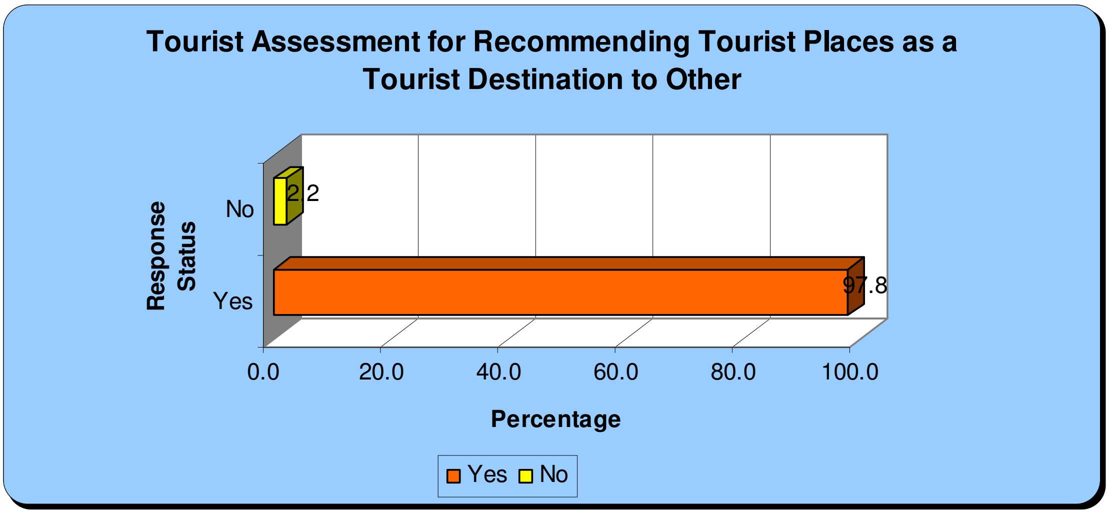
Chart 33



97% respondent visitors organized trips by their own. The study was conducted in cool season of winter; therefore, all the respondents were locals rather than foreigners. The rest 3% arrange the trips through tour operators, internet, and travel agencies.

2.9.5 Tourist Opinions for Recommending Tourist Places

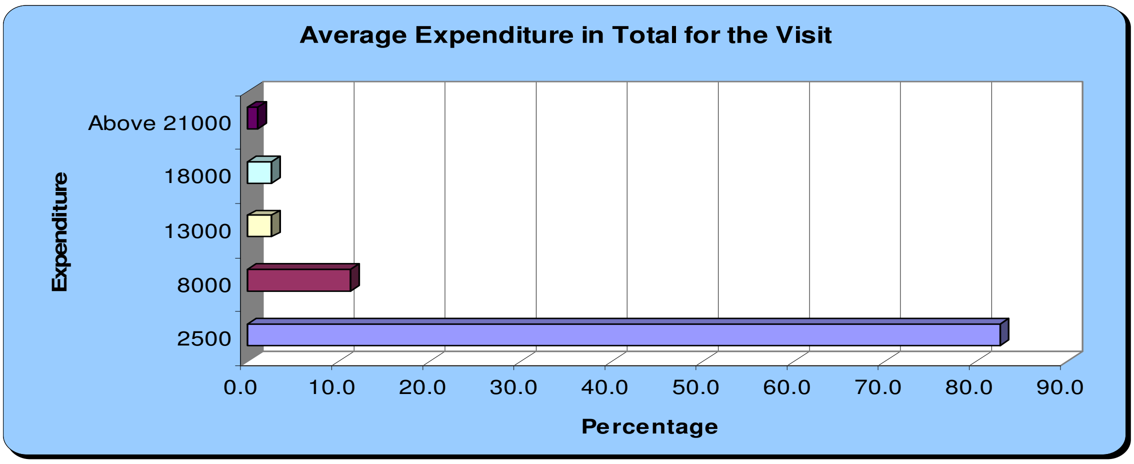
Chart 34



97.8% respondent visitors showed satisfaction from the tourist places and they recommend the tourist places to others. Due to insecurity and unavailability of attractive sightseeing in the tourist places, 2.2% respondents don't recommend the tourist places as a tourist destination to others.

2.9.6 Tour expenditure

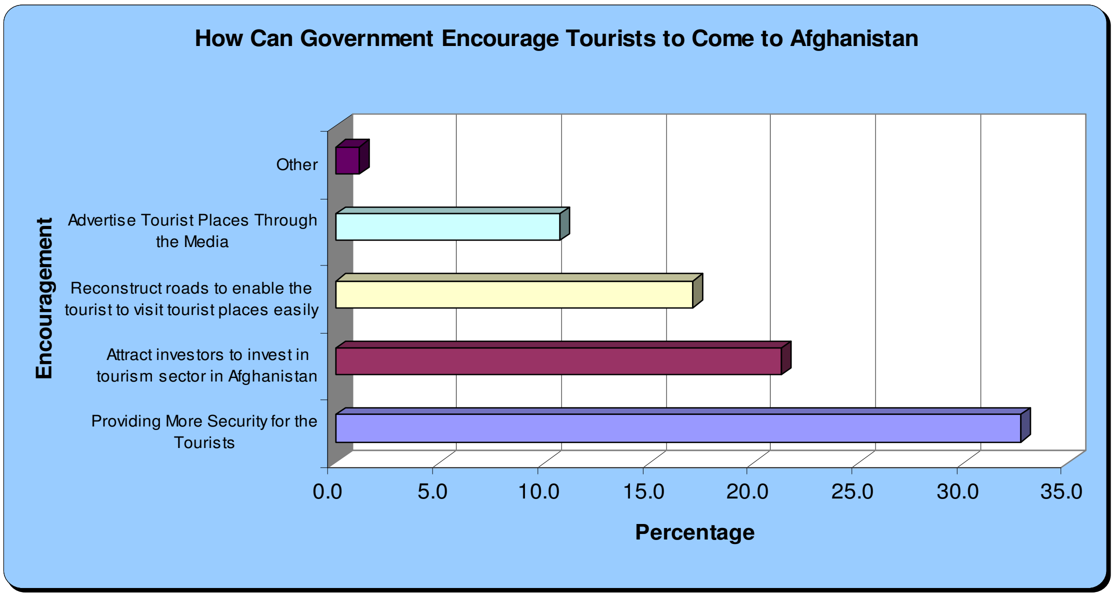
Chart 35



As an average, 81% respondent visitors spent Afs. 2,500 (US$ 50) per person, 9% indicated Afs, 18,000 (US $ 360$) for their visit. An average expenditures per person were lower in Nangrahar and were higher in Kabul. For provincial level data *(See Annex 5)*.

2.9.7 Tourist Suggestions for Government to Develop Tourist Sector

Chart 36

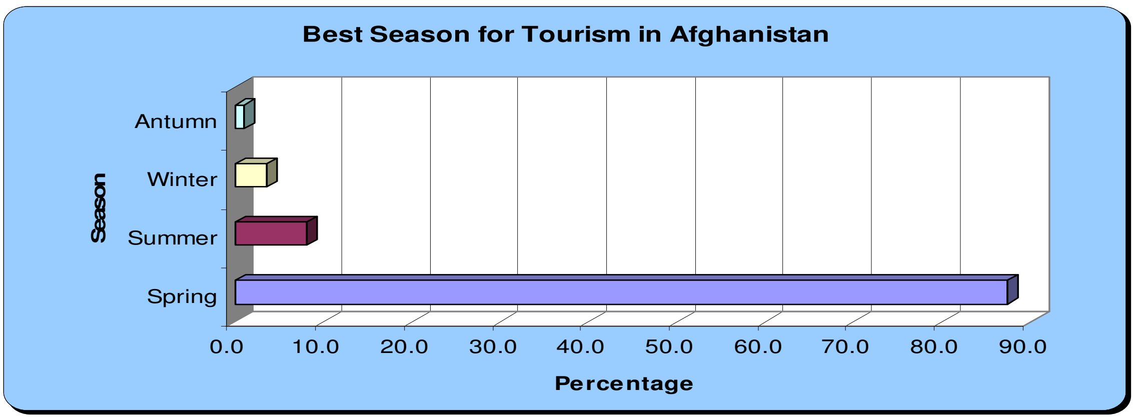


21% stated that the government is bent on to attract investors for invest in tourist sector, 32.5% respondents suggested security improvement, 17% emphasized on reconstruction of road to enable the tourists to visit tourist places easily, and 10% respondents suggested to reveal tourist places by media.

The surveyors felted that the main focus of the tourists was provision of security and reconstruction of tourist places.

2.9.8 Best Season for Tourism

Chart 37



88% respondents prioritized spring as a best season for tourism, 8% respondents mentioned summer, and 4% tourists mentioned autumn and winter.

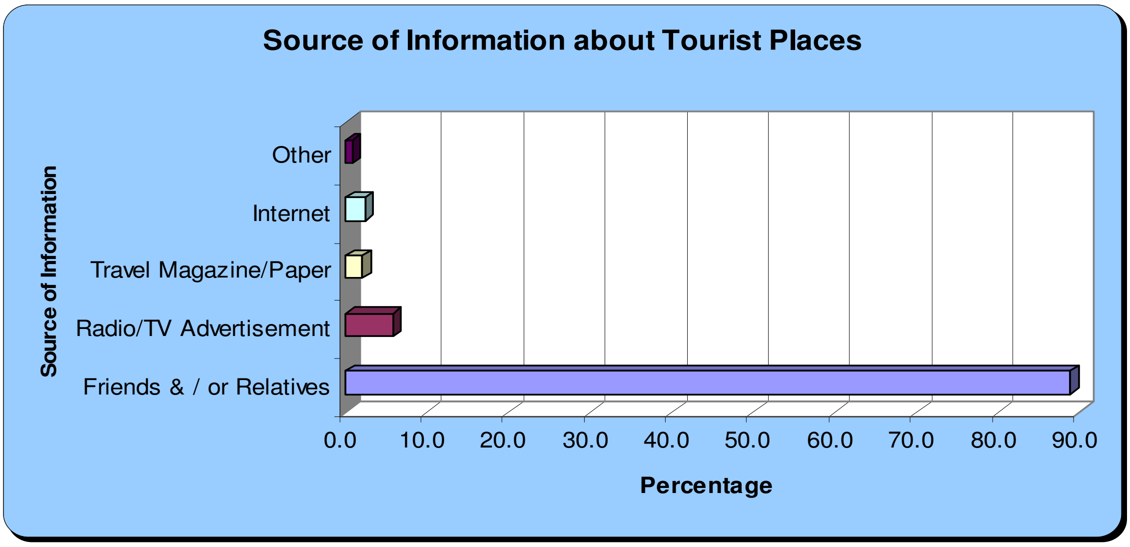
2.9.9 Tourist Opinions for Tourism Development

Table 1

No	Respondents Suggestions/Opinions	%	Number Respondent
1	Provision of security	37.82	222
2	Development tourism sector	37.14	218
3	Government should take care of parks	7.84	46
4	Reconstruction of roads	4.43	26
5	Advertisement tourist places through media	3.07	18
6	No opinions	2.39	14
7	Development of entertainment places for women by government	2.04	12
8	Support of private sector by government to develop businesses	1.53	9
9	Provision of job opportunity by the government to people	1.36	8
10	Encouragement of investors by the government to invest in tourism sector	1.36	8
11	Promotion of communication, transportation, electrician, and hospitality sector by government.	1.02	6
		100	**587**

2.9.10 Source of information about tourist places

Chart 38



88.8% tourists received information about the tourist places from friends and relatives, 5% from radio and TV advertisements, and the rest 7% from travel magazines and internet. For provincial level data (*See annex 6)*

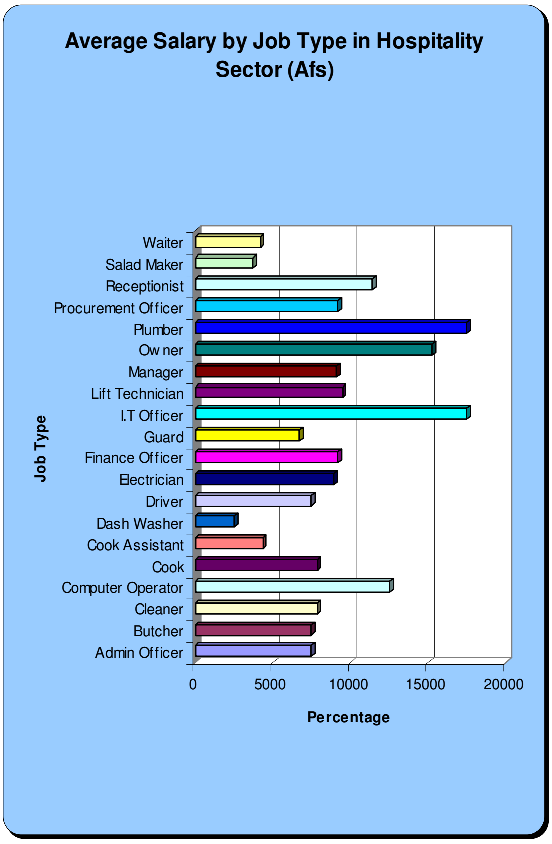
CHAPTER 3

HOSPITALITY SECTOR

3.1 2Hotels and Guesthouses

Employment and average salary by job type in Hotels and Guesthouses

Chart 39



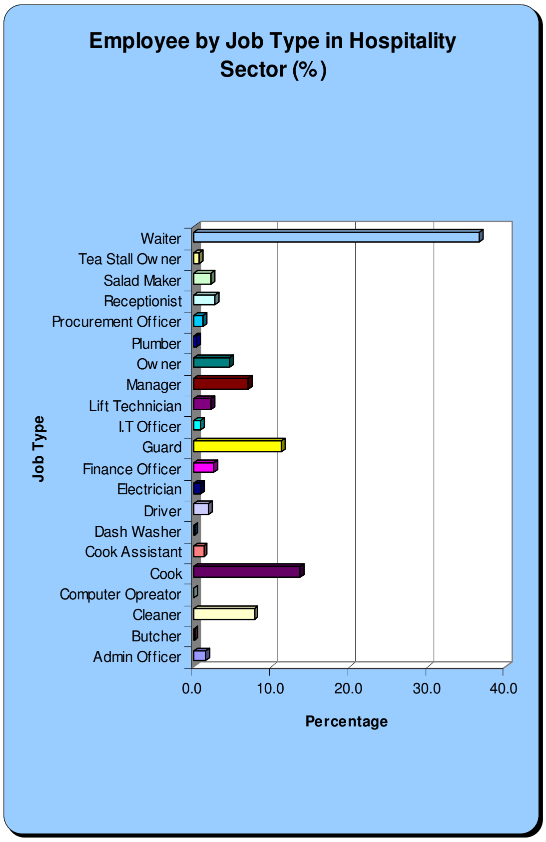
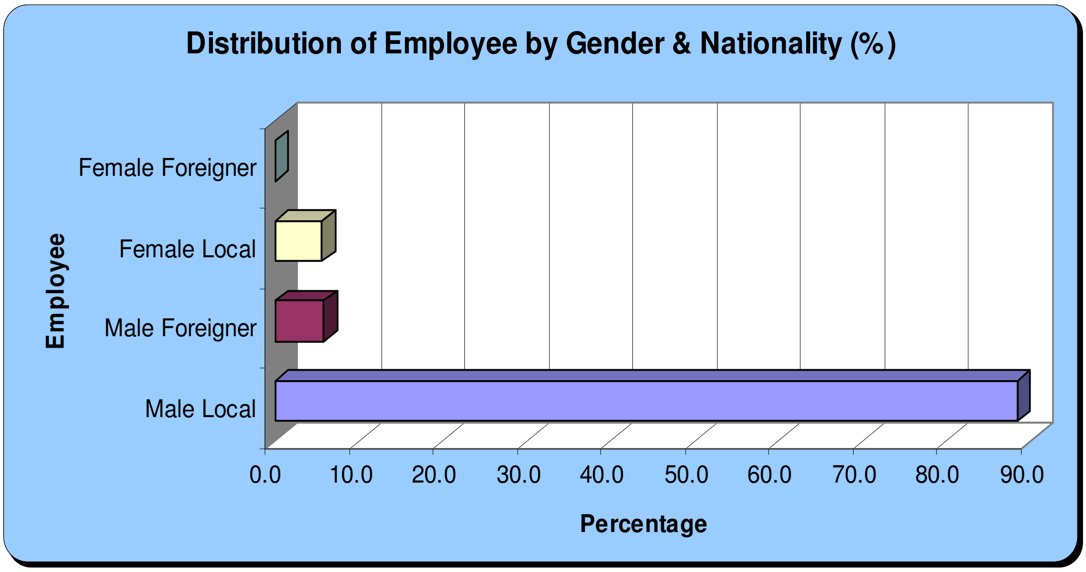


Chart 38 represents average salary and percentage of employees by job type. The high paid employees were plumbers and IT officers with average salary Afs. 17,500. In contrast the plumbers and IT officers employment was only 1% in the sector. The computer operators were received an average Afs. 12,500, and recipients Afs. 11,000. As a result, the lowest average salary by job type identified dash washers with Afs. 2,500.

The waiters by job type cover 40% of the total employees followed by cooks and Guards12% and 10% respectively. The average number of employees per hotel was identified 30 persons.

3.2 Employees Distribution by Gender and Nationality

Chart 40



Over 88% employees in hospitality sector were male locals and male foreigners were 6%. Participation of women in hospitality sector was 15 times less than males. Only 1% female foreigners were reported in this sector.

3.3 Employment level over the last 12 months

Chart 41

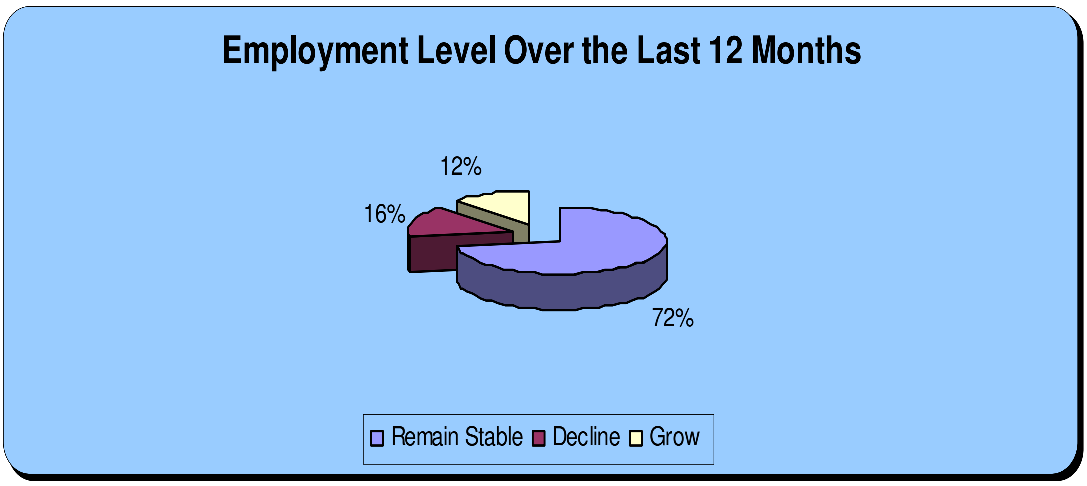


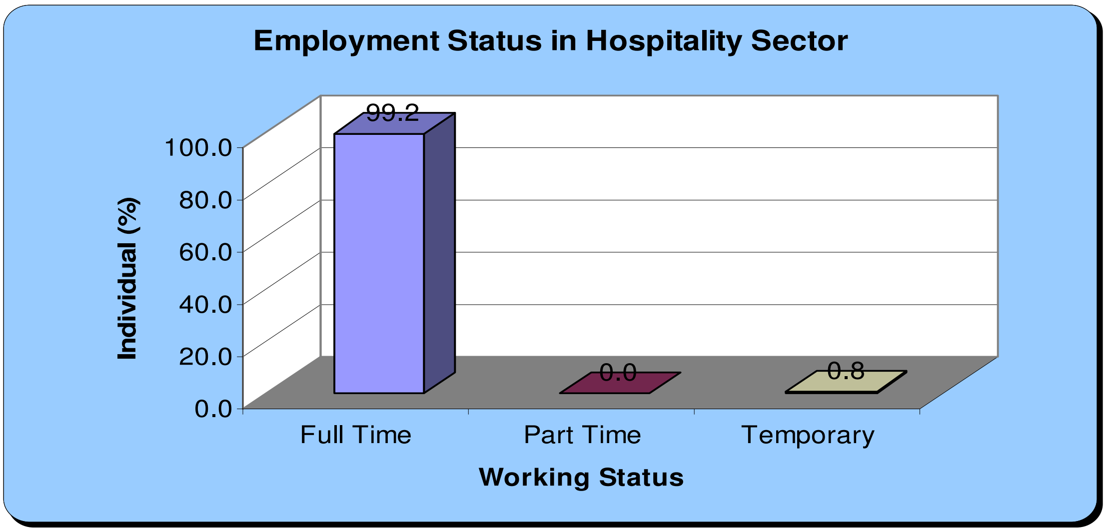
Chart 41 indicates that nearly two-third (72%) of the respondents claimed that their employment level remained stable in the last 12 months.

16% respondents stated that their employment level has declined and 12% respondents stated that their employee level has grown up in the last 12 months.

The average of decline in employment level 18.4% and grow rate was reported 13% in the employment level of grow in hospitality sector. The decline rate was mostly reported in Kandahar province and growth was experienced in Kabul.

3.4 Employment Status in Hospitality Sector

Chart 42



The Chart 42 indicates that 99.2% are full time employees. Only 0.8% was reported temporary.

3.5 Degree of Difficulties in Finding Qualified Applicants in Hospitality Sector

Chart 43

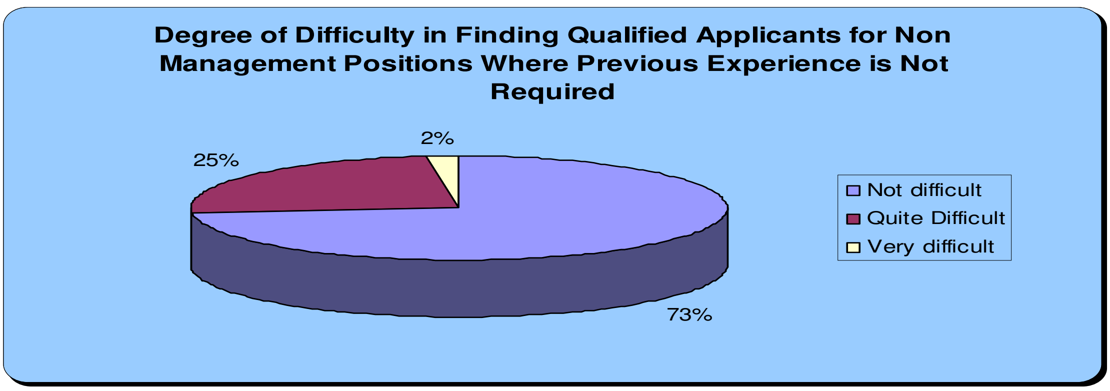


Chart 43a

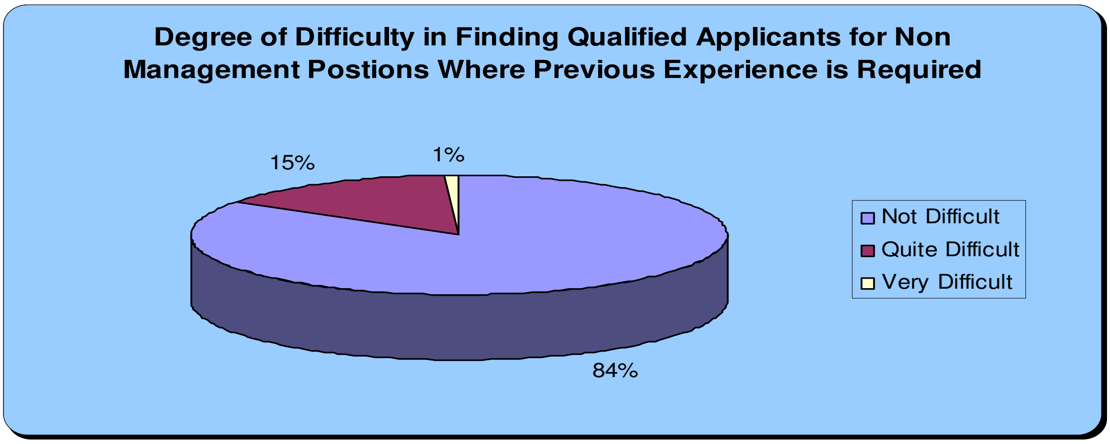


Chart 43b

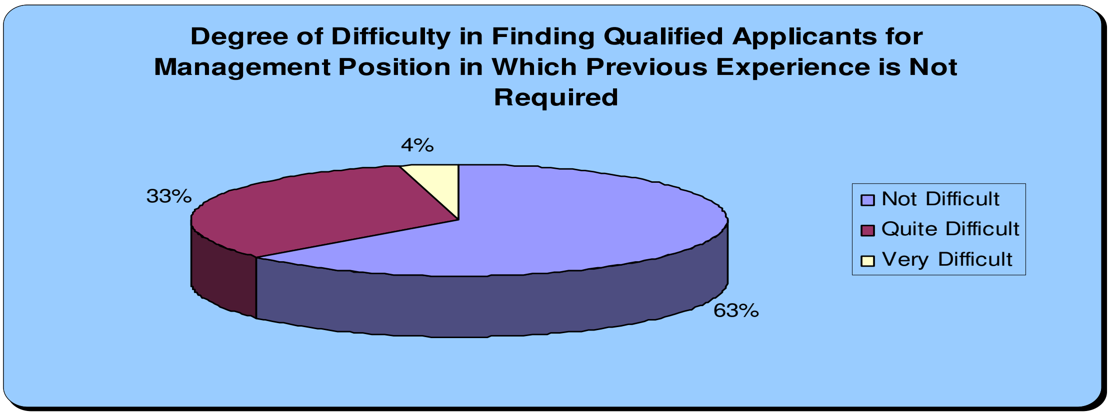
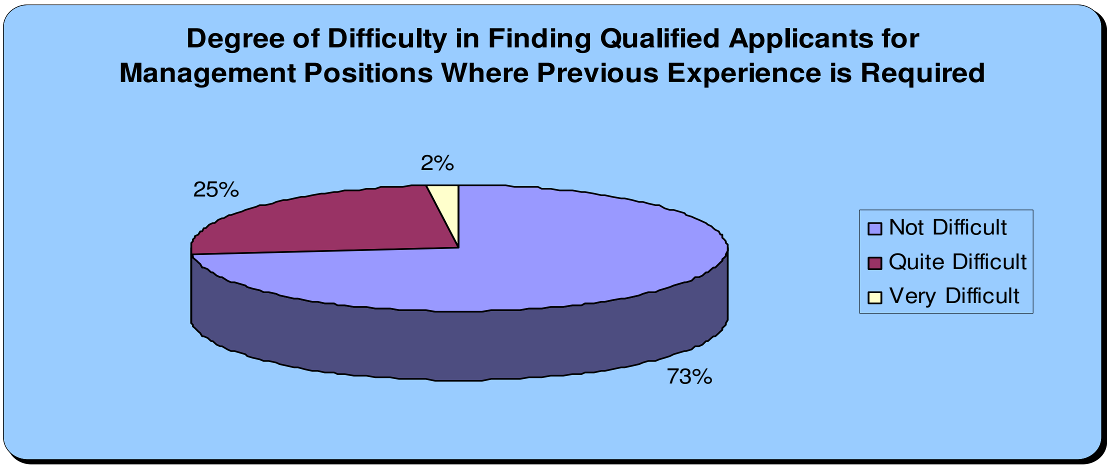


Chart 43c

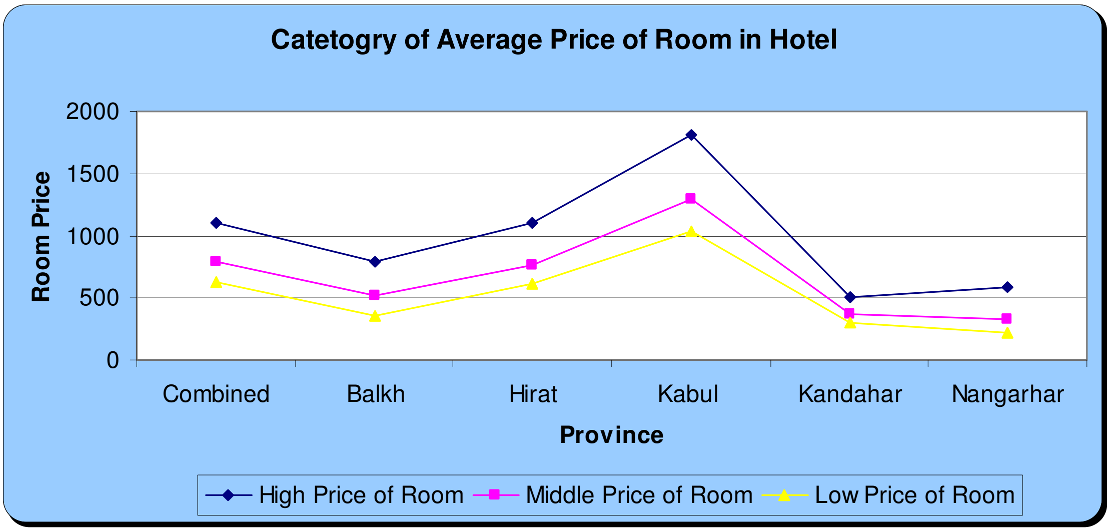


33% employers considered finding qualified applicants "Quit difficult" for management positions where previous experiences are required. The management positions refer to manager, cashier, etc. Non-management positions refer to employees working in catering. The chart 43 and 43c represent the same degree of "quit difficult" in filling vacancies.

Chart 43a reflects the lowest (15%) degree of difficulty in finding qualified applicants for non-management where previous experiences are required.

3.5 Average Price of Room in Hotel

Chart 44



The chart44 represents the sampled average high, middle and low price of room in hotel per day in the 5 targeted provincial capital Cities.

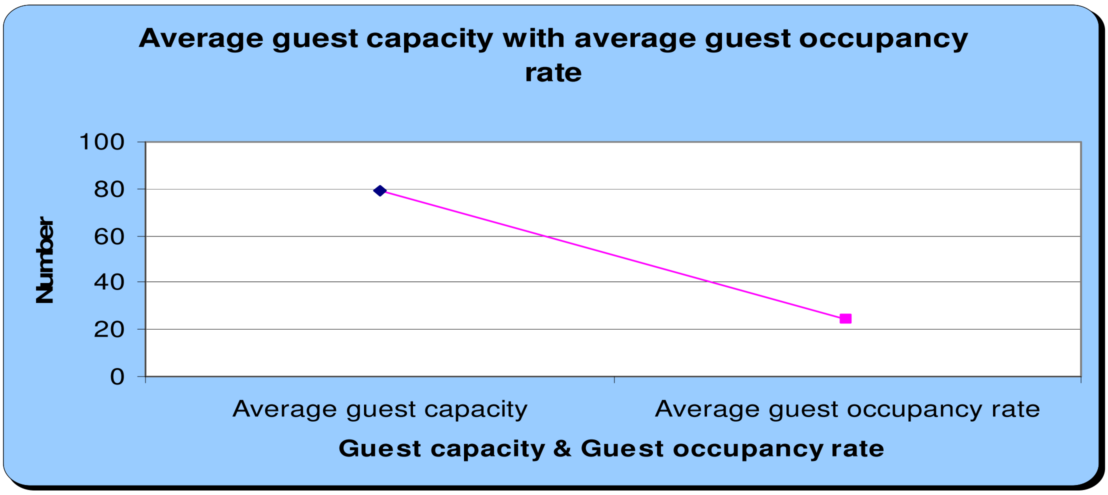
The highest average price of room in hotel was reported in Kabul with Afs. 1,800 as a high price of room[9], middle price Afs. 1,200 and low price Afs. 1,000. Most of the hotels with low price of room range Afs 100 to 300. Therefore, the average high price of room was reported Afs 1,800 per night. The highest price per night in some hotels was reported Afs. 10,000 per night.

The average low price of room in Kandahar and Nangrahar might be the affect of the neighbor Pakistan where average price is experienced lower as compared to Afghanistan. Most of the hotels were reported with low price of room range Afs. 100 to 200 per night. Some hotels with the high price of room were reported around Afs. 2,000 per night in these two provinces.

[9] Due inaccessibility of contact, intercontinental, Serena hotel are not include in the study

3.6 Average guest capacity with average guest occupancy rate

Chart 45



The combined sample represents average guest capacity of 80 persons and average guest occupancy rate was reported 22 persons per night.

The highest average guest capacity of 98 persons and average guest occupancy rate 42 person per night was reported in Kabul where the high average guest capacity 85 persons and low guest occupancy rate 15 person per night was reported in Kandahar. It might be due insecure situation for travelers.

Nangrahar was at reasonable average guest capacity rate with 70 persons and average guest occupancy rate was 35 persons per night. For provincial level data *(See Annex 7)*.

Note: The survey was conducted in winter season. The occupancy rate might be higher in spring and summer seasons.

3.7 Business marketing way in hospitality sector

Chart 46

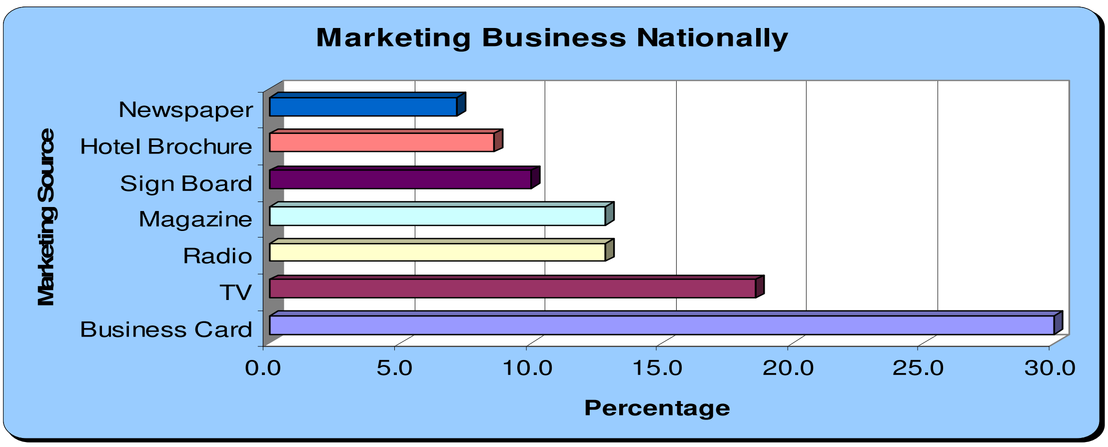
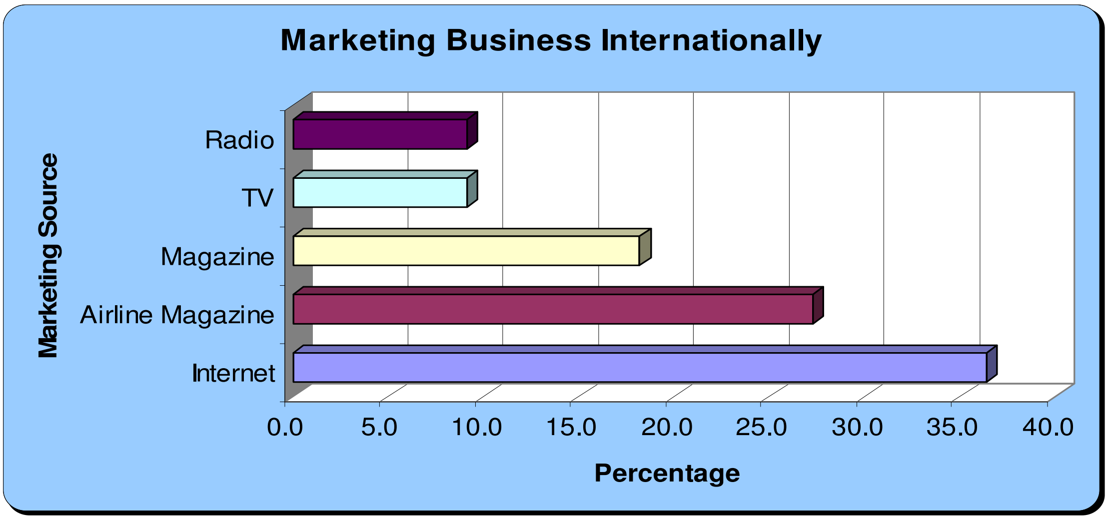


Chart 46a

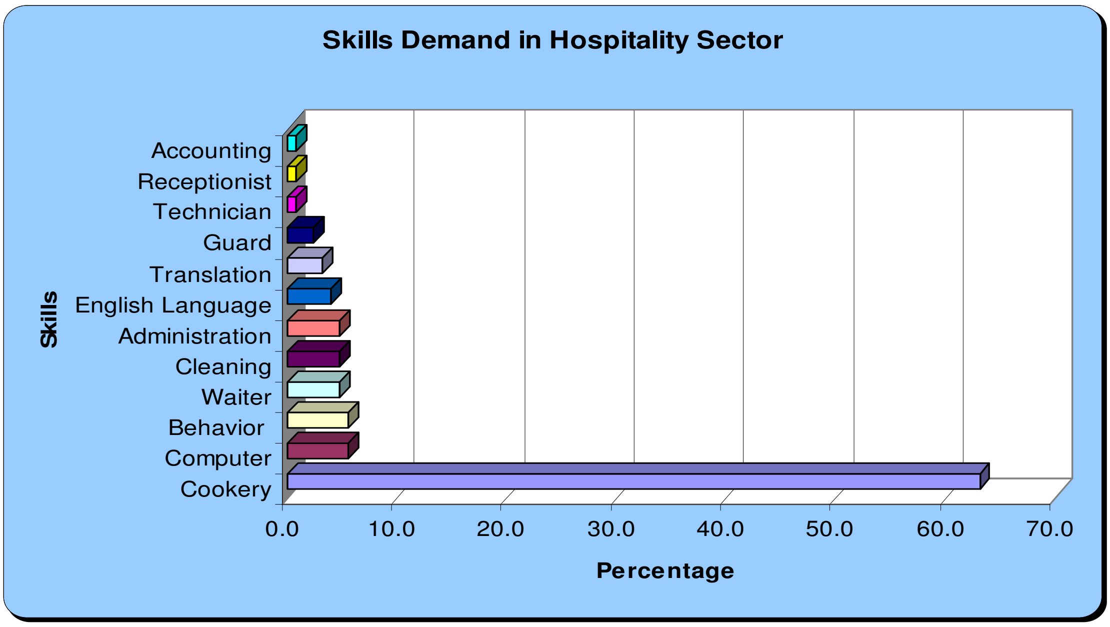


30% respondents market businesses through business cards and 17% through TV at national level.

The chart 46a represents common marketing practice in the sector internationally. 36% businesses are market through internet and 17.5% through common magazines and 26% airline magazines are used as a source of marketing in the hospitality sector internationally.

3.8 Skills Demand in Hospitality Sector

Chart 47

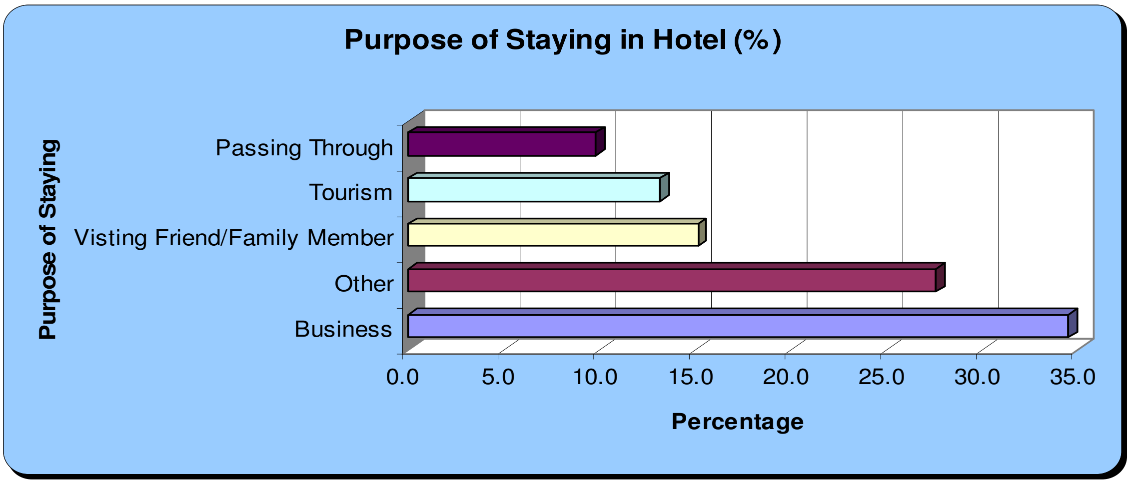


62% employers suggested training in cooking, 5% computer, 5% behavior, 4% waiter, 3.5% cleaner, and 3.5% in administration. For a better communication with clients English language and translation skills demand placed in third category (6%).

Section 3b: Hotel Client

3.8.1 Purpose of staying in hotel

Chart 48

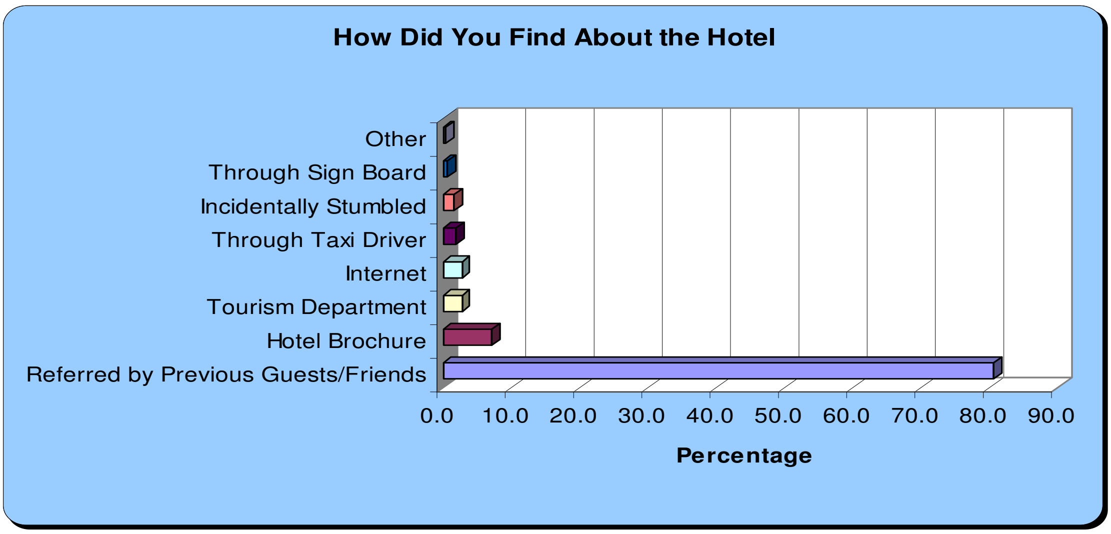


34% respondents said that the purpose of stay in hotels is referred to business activities and 24% respondents were referred to students, labourers, travelers, and for treatment purposes.

12.5% respondents were stayed in hotels for tourism. 14% were reported visiting friends and family, and 9% respondents stated that they have stay due to passing through. For provincial level data *(See Annex 8).*

3.8.2 Source of information about hotel

Chart 49



It is interesting for the owners of the hotels and guesthouses that the main source of marketing their businesses was due to business cards and Television on national level and through internet and magazine at international level (see section 2b chart 41 and 41b). Chart

45 represents that the highest percentage (80%) guests referred to previous guests and friends followed by a nominal percentage (6%) hotel brochure, tourism department (2%) and internet and tourism department (2%).

It is also notable to know that taxi drivers also played an important role in marketing in hospitality sector by 1.5%.

3.8.3 Assessment of quality of services of accommodation in the Hotel

Chart 50

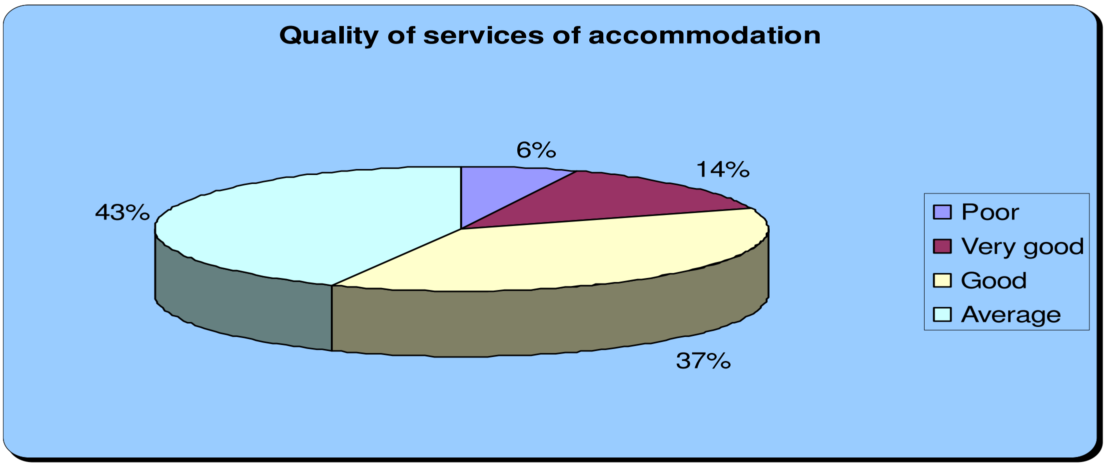
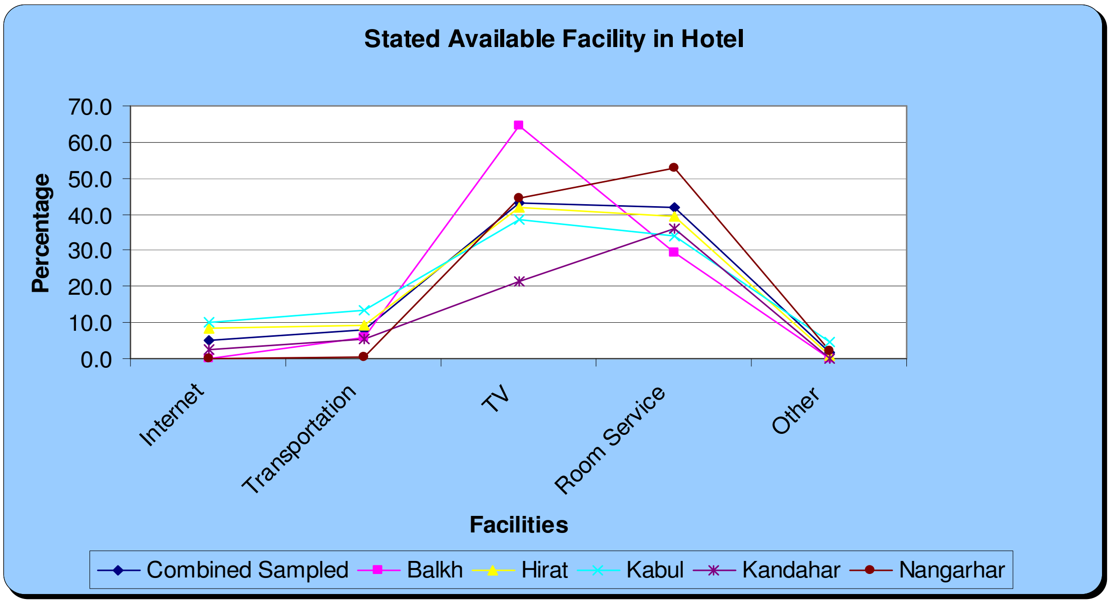


Chart 50 represents the combined sample. 43% respondents said quality of services are Average, 37% said Good, 14% mentioned Very good, and the remaining 6% said Poor.

72% respondents in Herat said that quality services of accommodation were good, 22% respondents considered quality of accommodation services good in Kandahar. 1% respondents in Herat considered quality of accommodation services poor, but in contrast to 15% respondents in Kandahar considered quality of accommodation services Poor.
For provincial level data (See Annex 9).

3.8.4 Available Facilities in Hospitality Sector

Chart 51



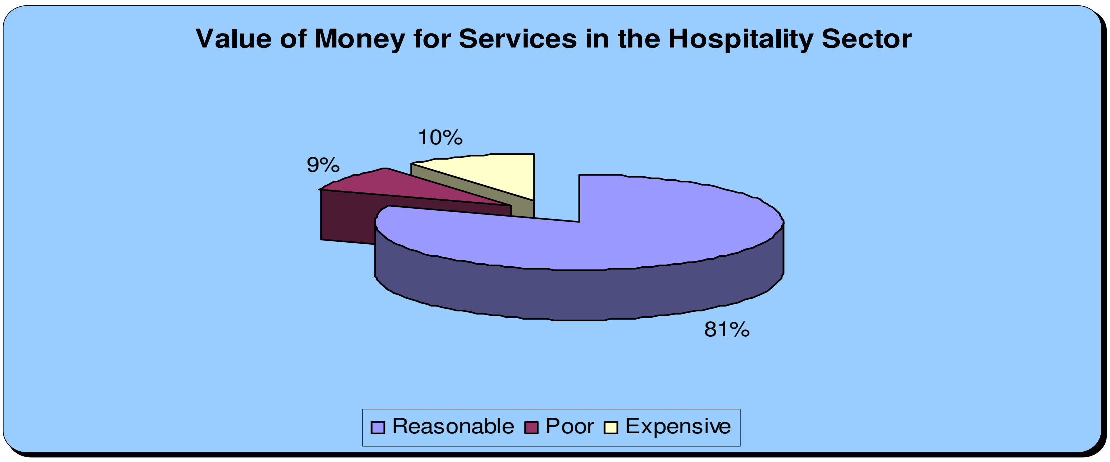
In the combined sample, 5.2% hotels have internet facilities, 8.1% transportation, 43% TV, 41. % room services.

The internet facilities in Kabul and in Herat are 10%, but in the rest provinces it was reported at the range of up to 5%. The highest transportation facility was rated 13% in Kabul and 0% in Nangrahar.

65% hotels in Balkh had TV facility where in Kandahar only 20% TV facility was reported.

3.8.5 Value of money for services in Hotels

Chart 52



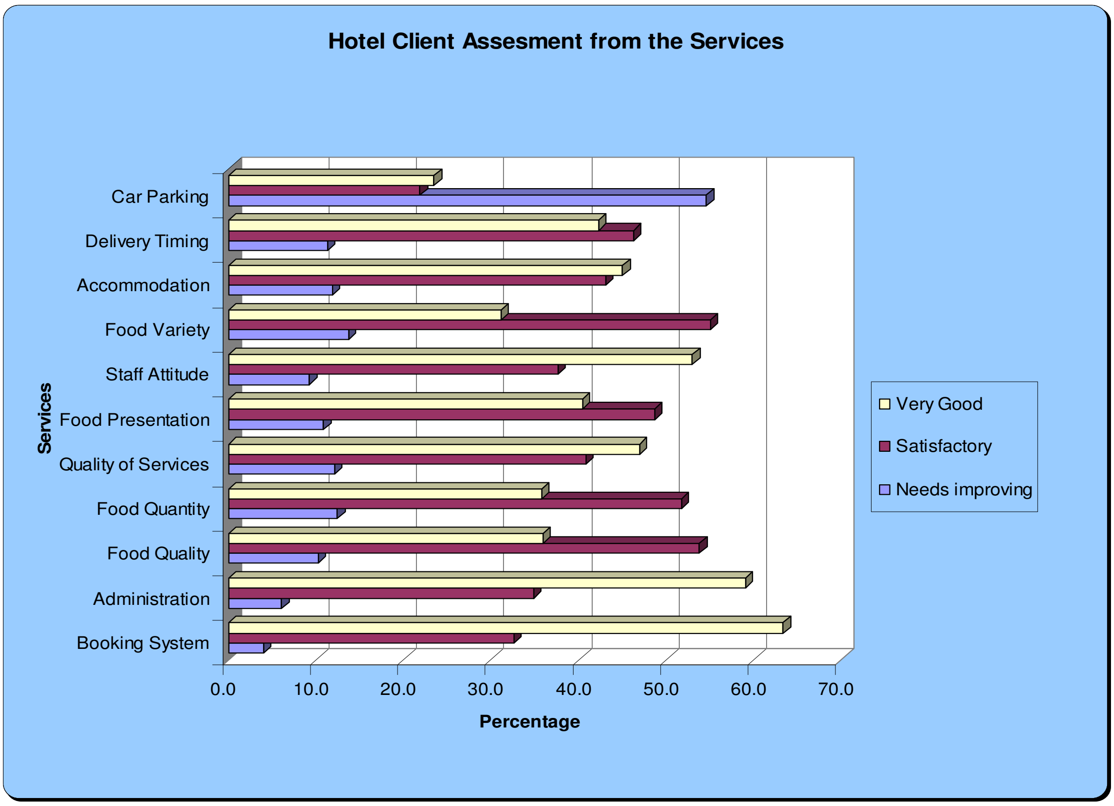
81% respondents considered value of money for services reasonable, 10% considered expensive, and 9% considered value of money for services poor.

91.6 % respondents considered value of money for services reasonable in Herat, 72% respondents considered value of money for services reasonability rate was reported in Kandahar (72%).The highest expensive rate of value of money for services and low quality of services was reported in Kandahar.

Overall, it can be said that Kandahar was identified for high prices and low quality of services in hospitality sector. For provincial level data (See Annex 10)

3.8.6 Hotel Clients Assessment from Services

Chart 53



In order to gauge opinion of hotel clients with respect to quality of available facilities in hospitality sector a list of all facilities was categorized by "very good", "satisfactory" and "needs improving".

Booking System

95% respondents stated that the booking system was either very good or satisfactory and 5% said that the booking system needs improvement.

Administration

94% respondents considered administration system either very good or satisfactory and 6% said that the administration system needs improvement.

Quality and Quantity of Food

Quality and quantity of services were running in equal rate. Over 90% respondents considered quality and quantity of services either very good or satisfactory and the rest 10% said that the food quality and quantity needs improvement.

Quality of Services and Food Presentation

88% respondents considered quality of services and food presentation either very good or satisfactory and 12% said that food presentation and services need improvement.

Staff Attitude

The staff attitude which is very important for costumers perception and helpfulness was identified (53%) very good and (37%) satisfactory where (9.3%) suggested improvement in the staff attitude.

Food Varity

31.3% respondents said that the food Varity was very good, 55% respondents said that the food Varity was satisfactory, and 13.7% were not happy with the food Varity and suggested improvement.

Accommodation and Delivery Timing

Accommodation and delivery timing were running equal at the rate of very good (45%), satisfactory (45%), and need improvement (10%).

Car Parking

54.6% respondents suggested improvement in car parking facility, 23.4% said "very good", and the remaining 21.9% satisfactory.

As a result, majority of the respondent clients were satisfied with the hospitality sector except car parking facility that needs improvement. For provincial level data in (See Annex 11)

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ANNEXES

Part I

Province wise Data

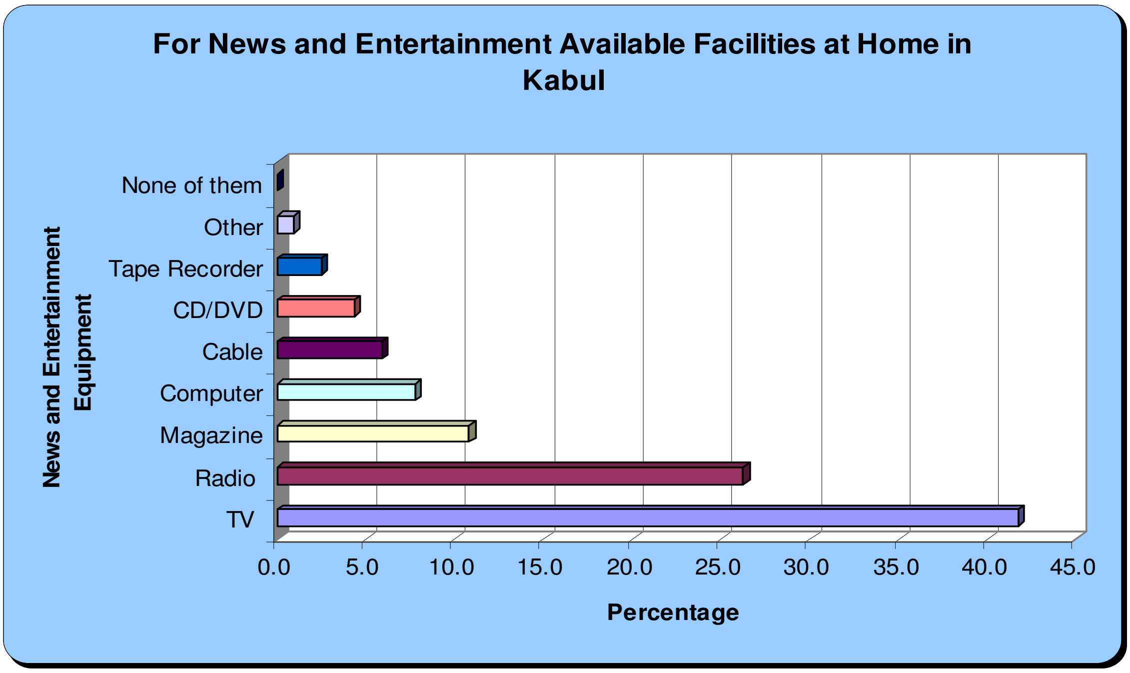
Part II

Questionnaires

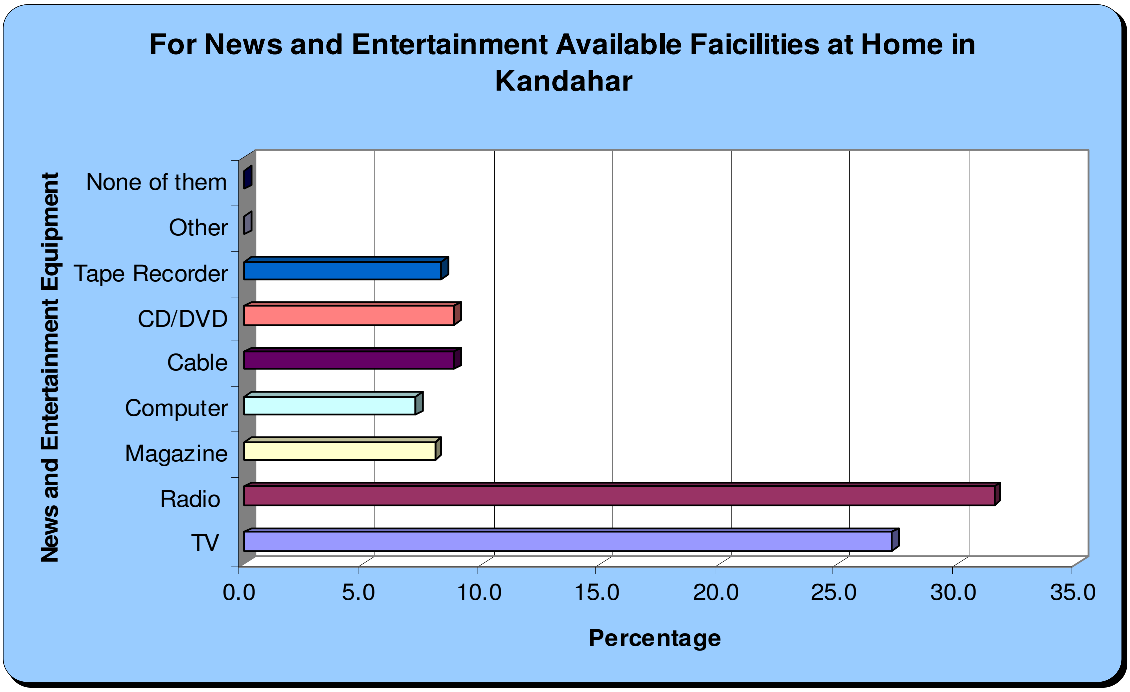
Annex -1

For news and entertainment available facilities at home

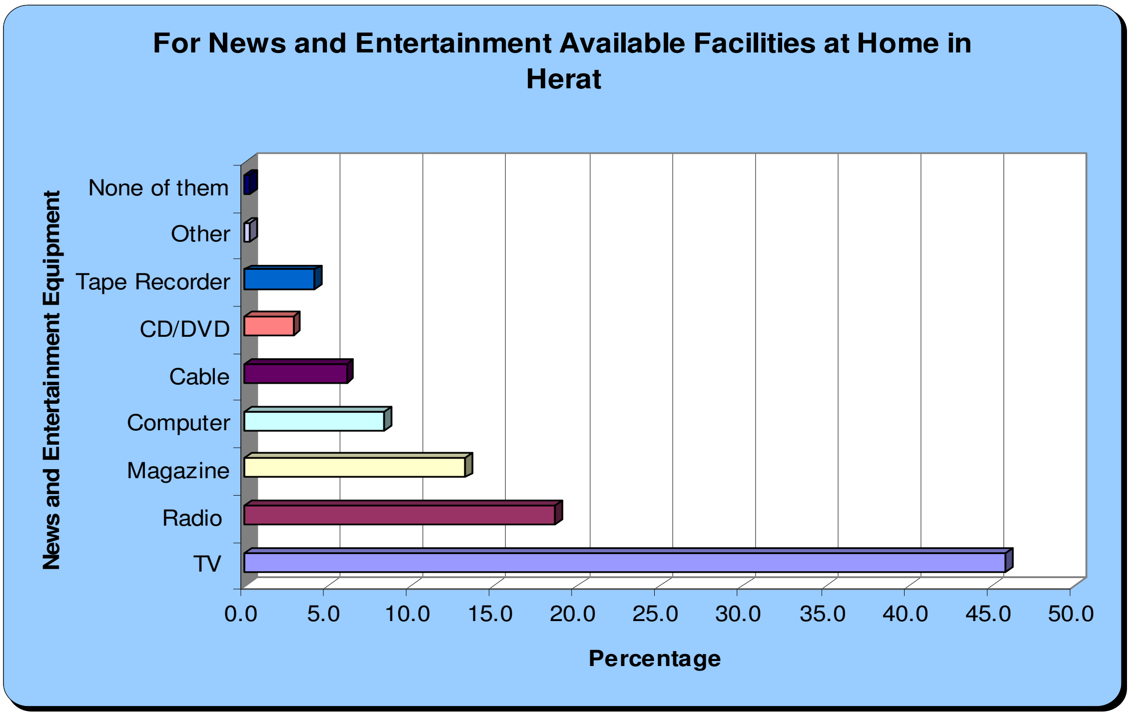
Annex-1a



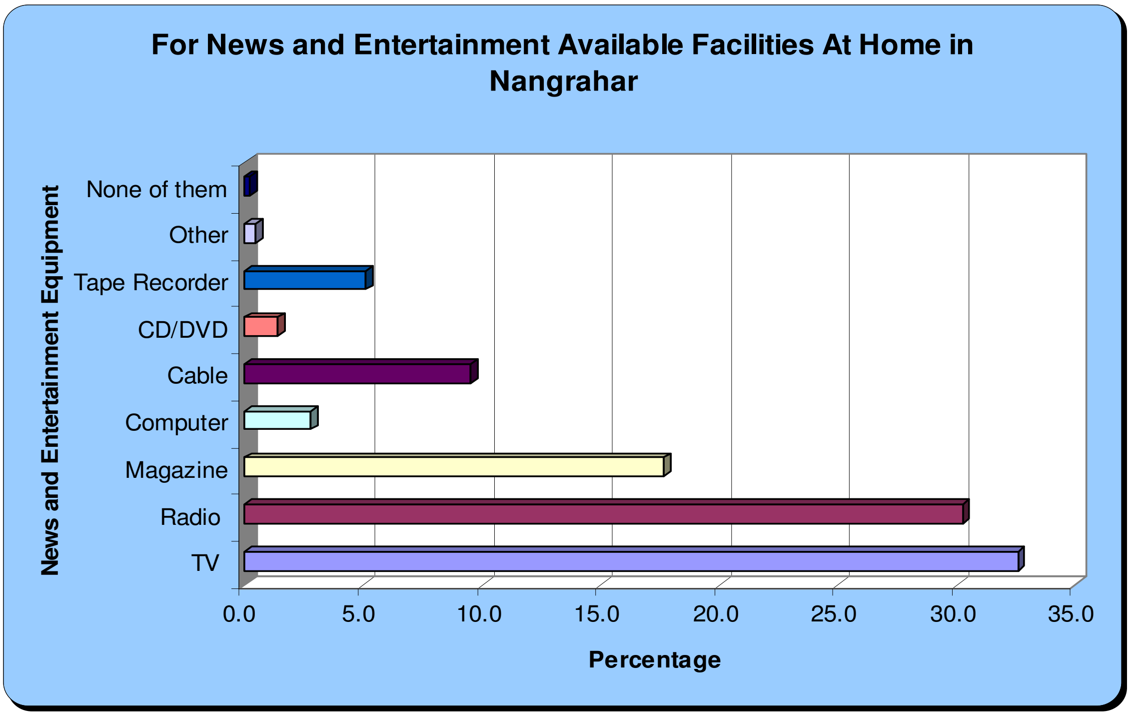
Annex-1b



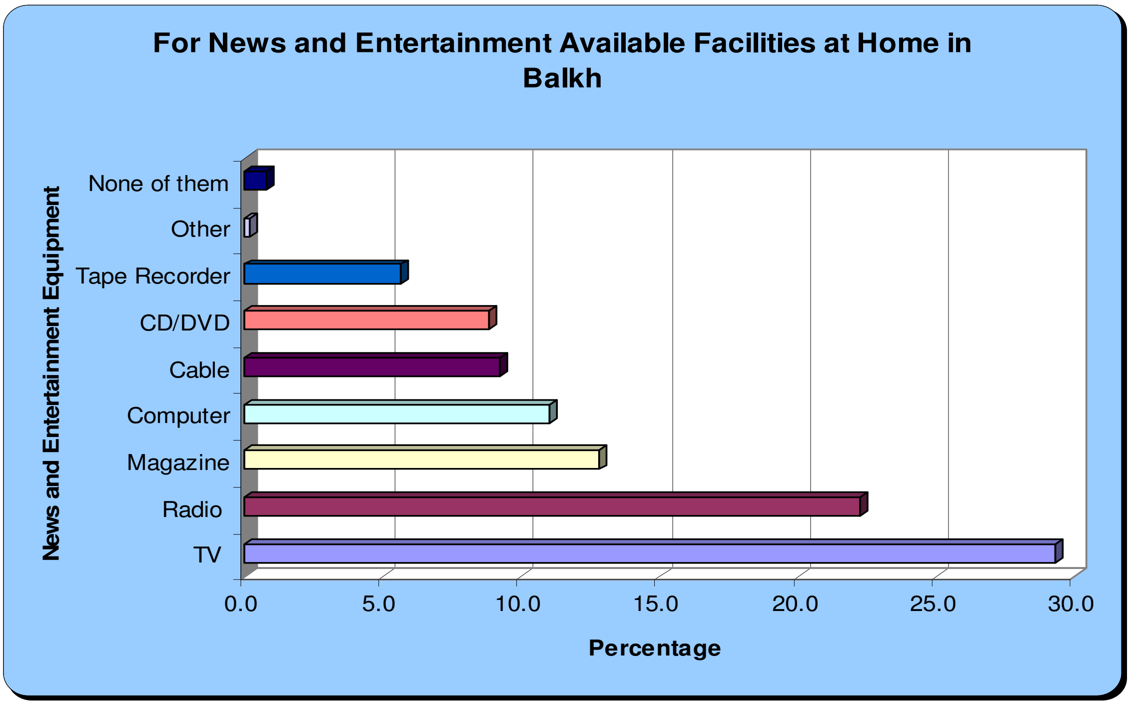
Annex-1c



Annex-1d



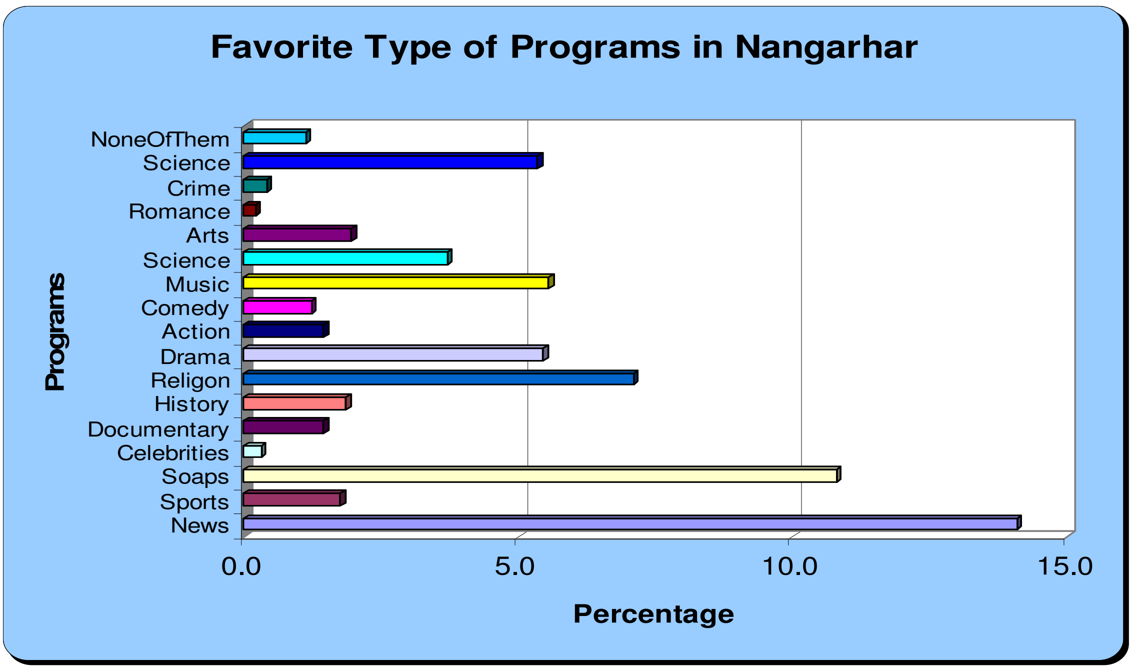
Annex-1e



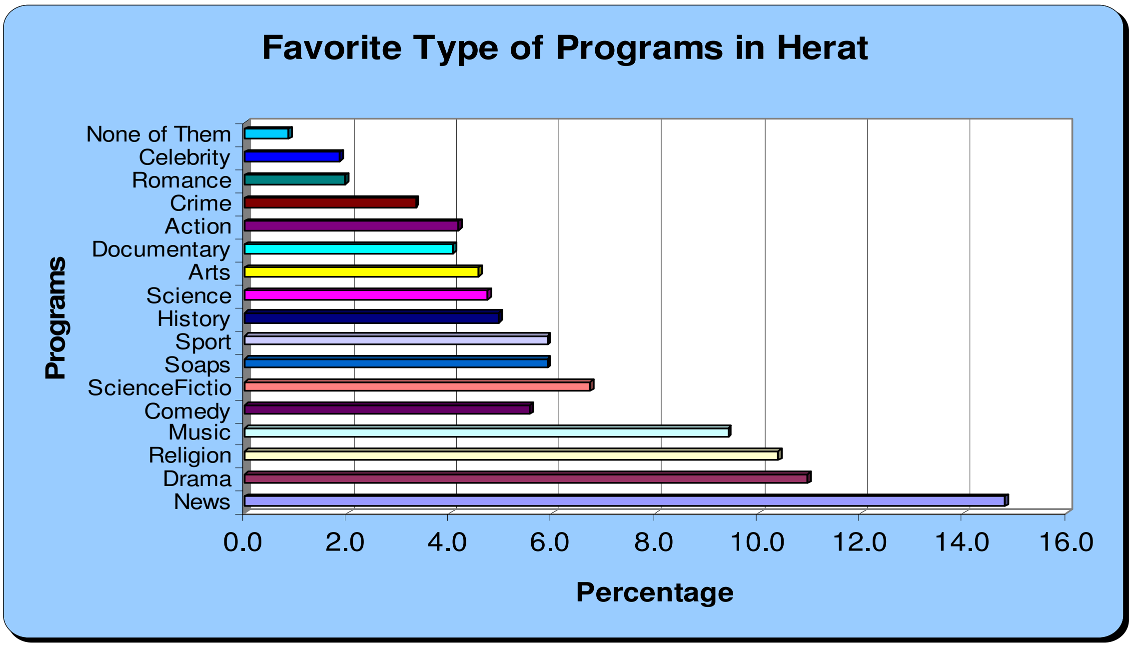
Annex - 2

Favorite type of programs

Annex-2a



Annex-2b



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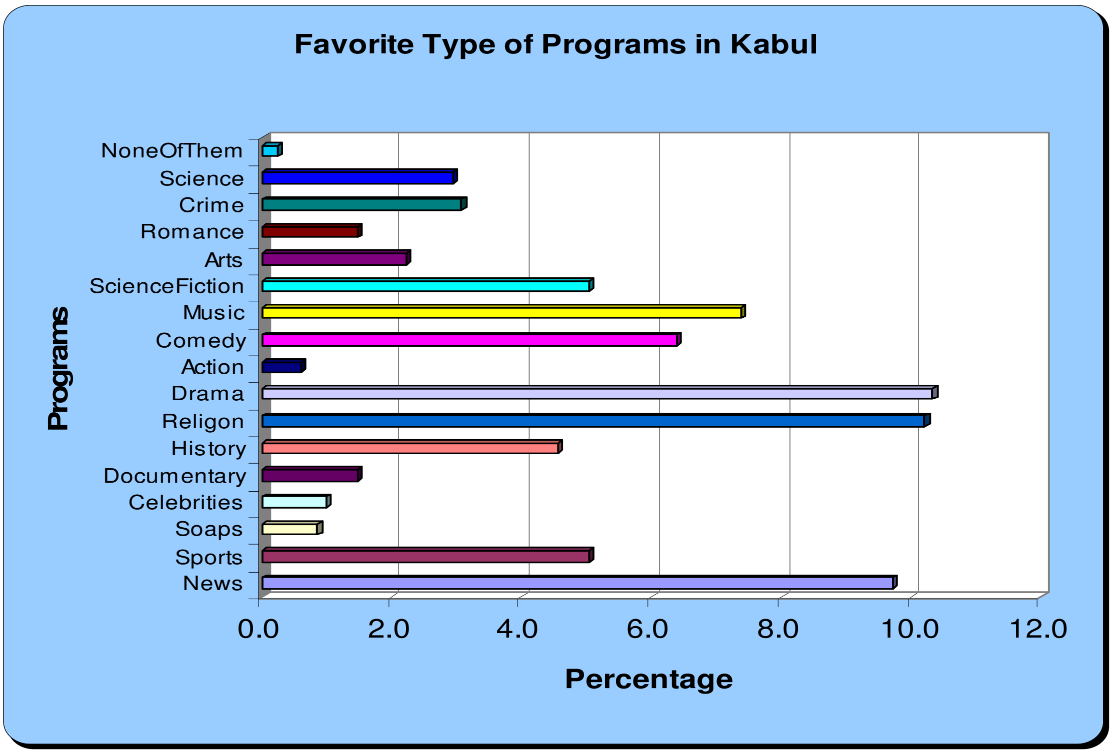
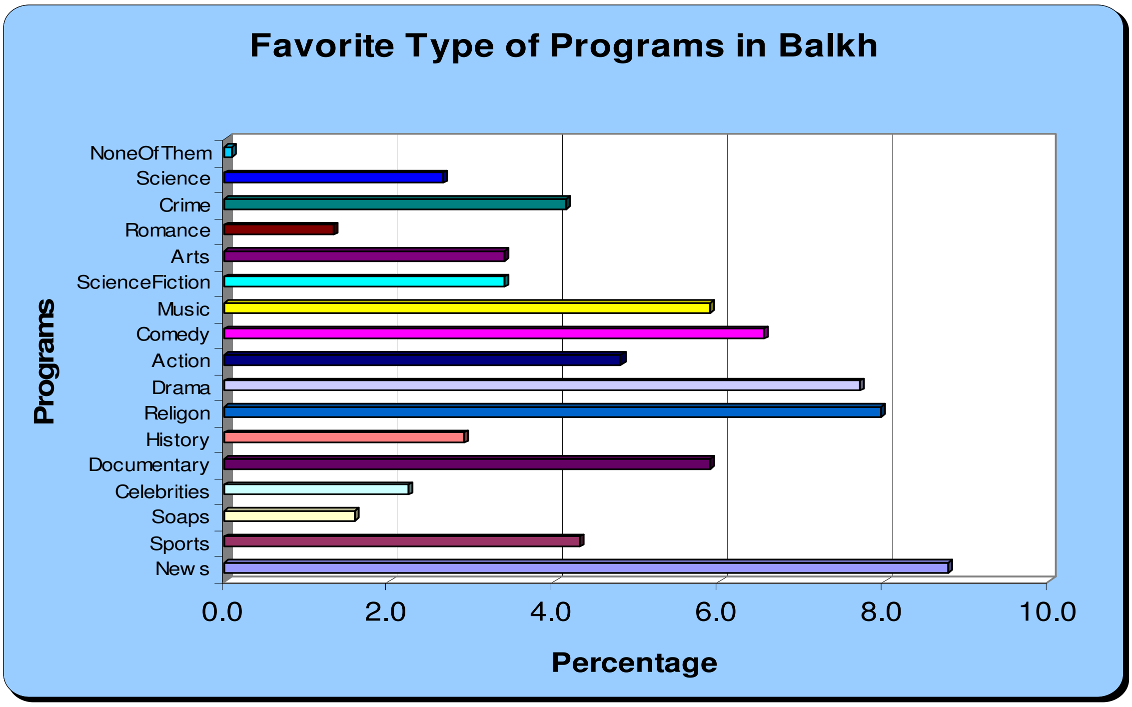


Annex – 2d



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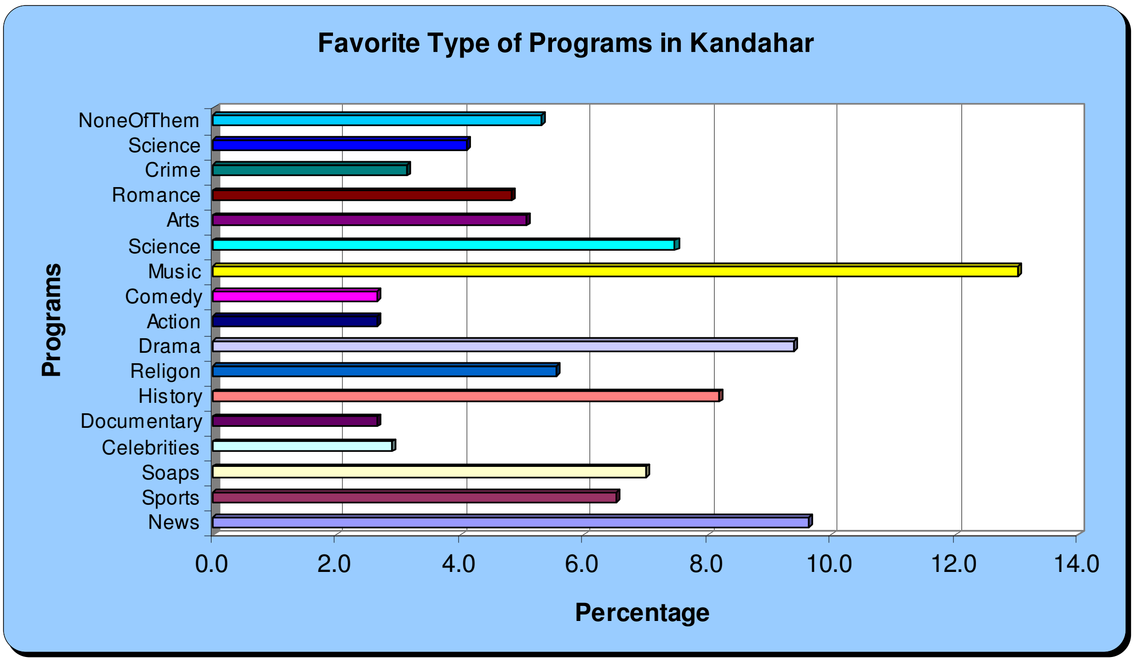
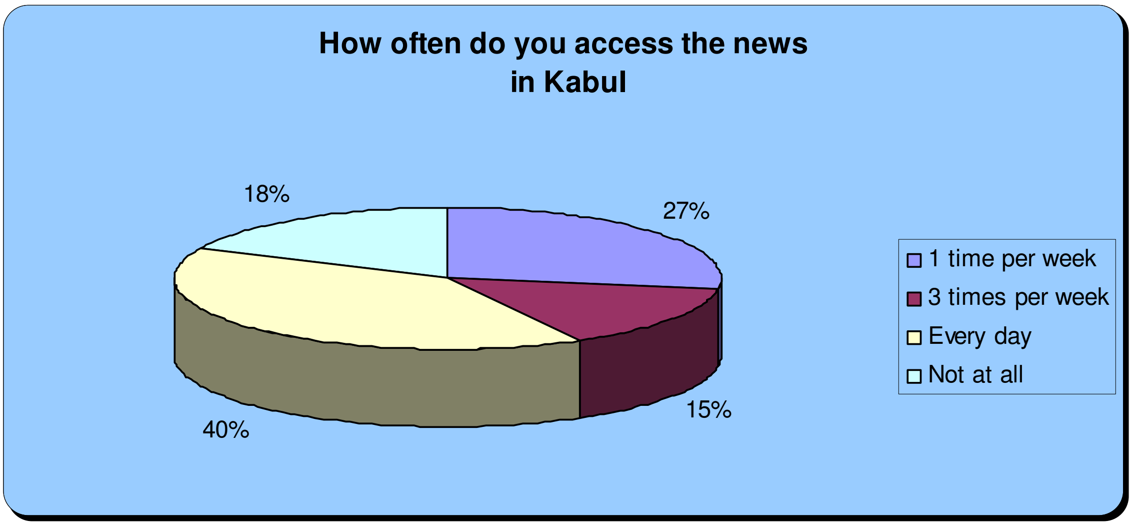


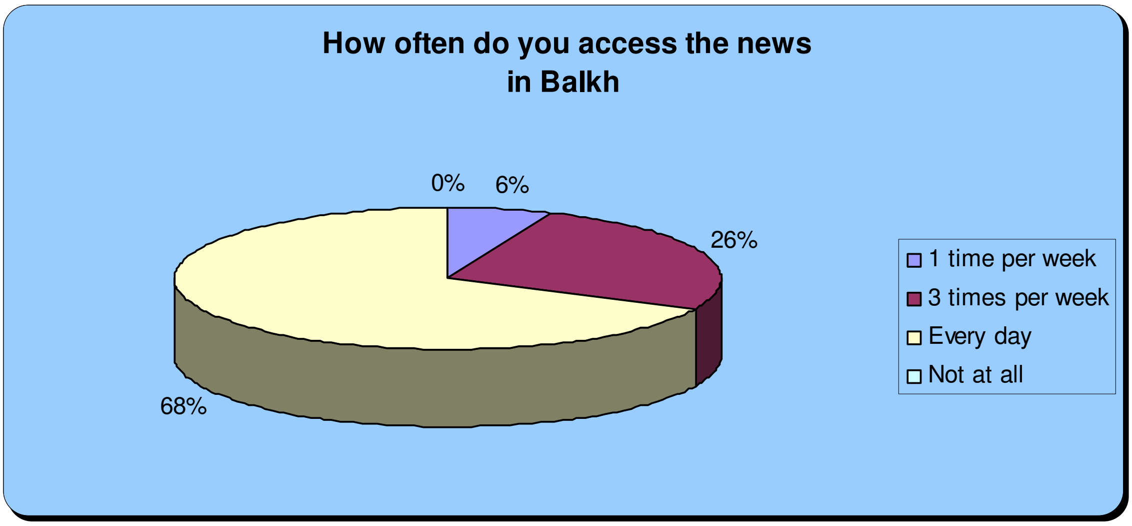
Annex - 3

How often do you access to news

Annex – 3a



Annex – 3b



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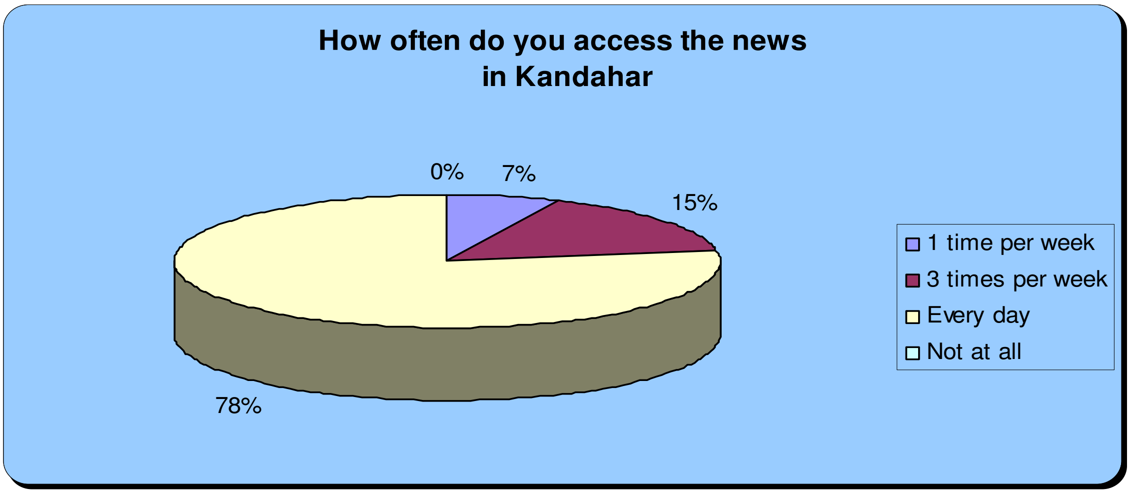

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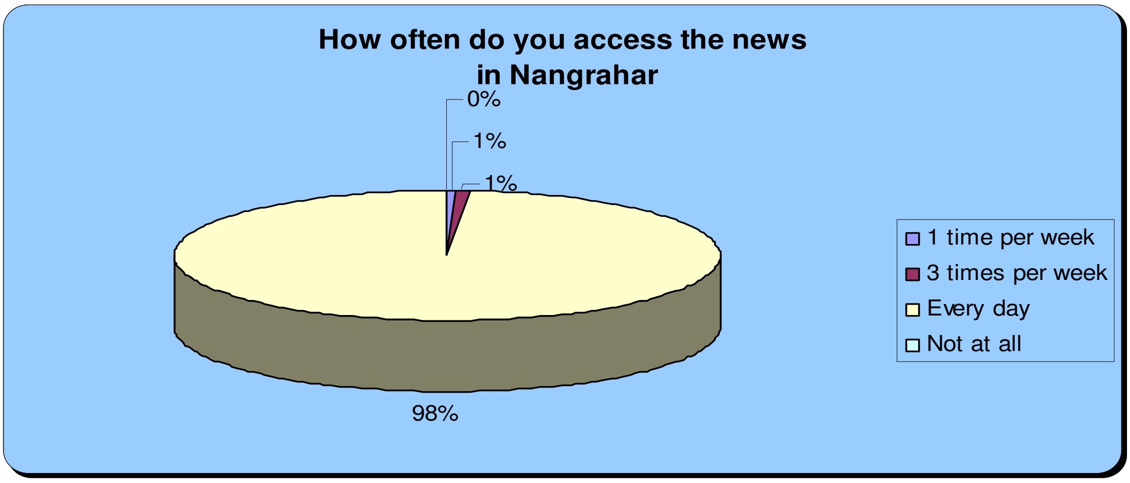

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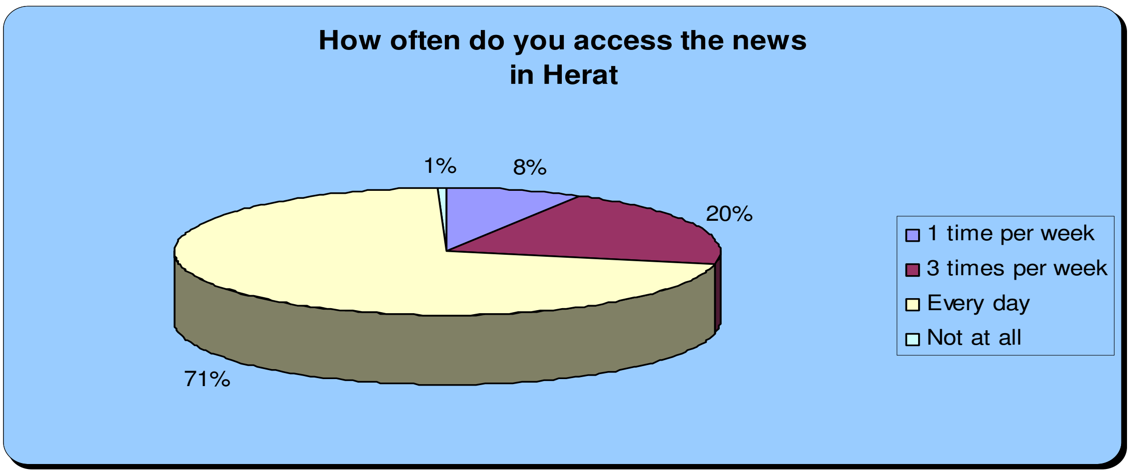
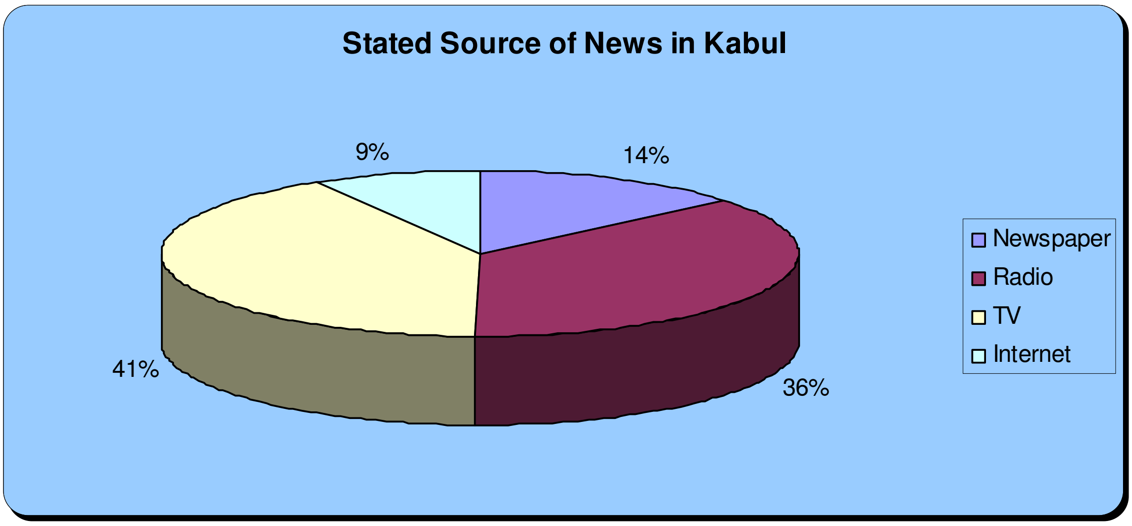
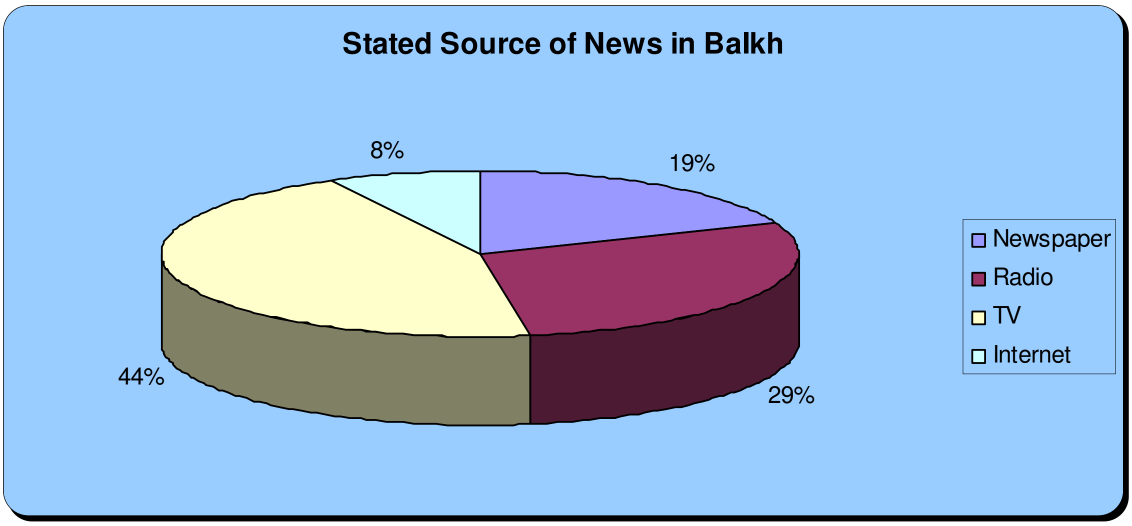


Annex-4
How do you access to news?

Annex – 4a



Annex – 4b



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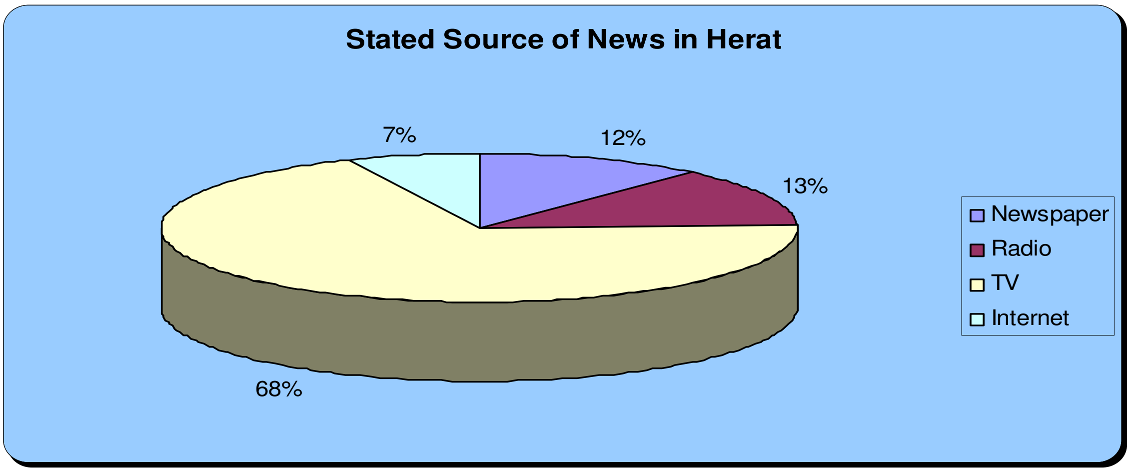

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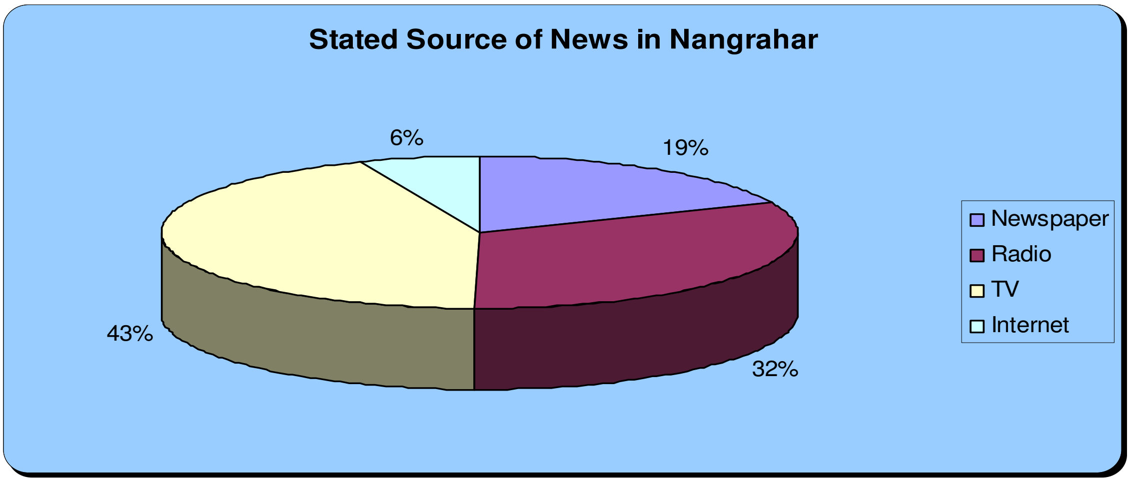

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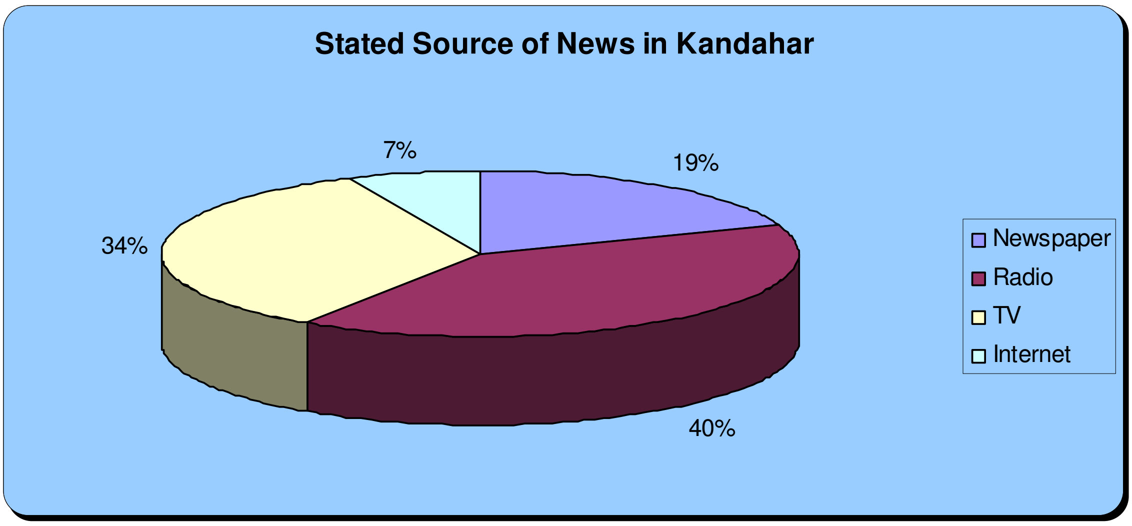
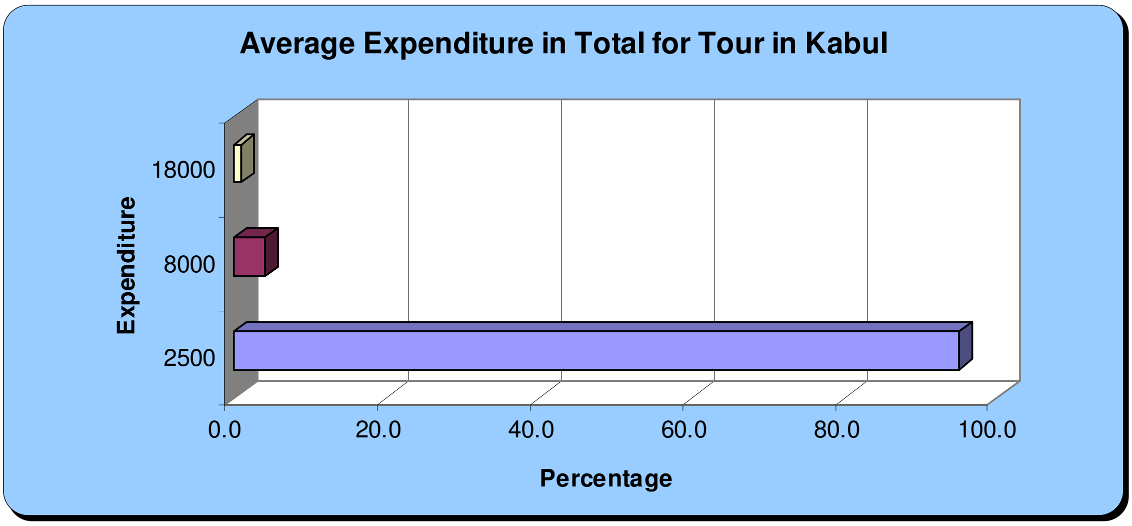


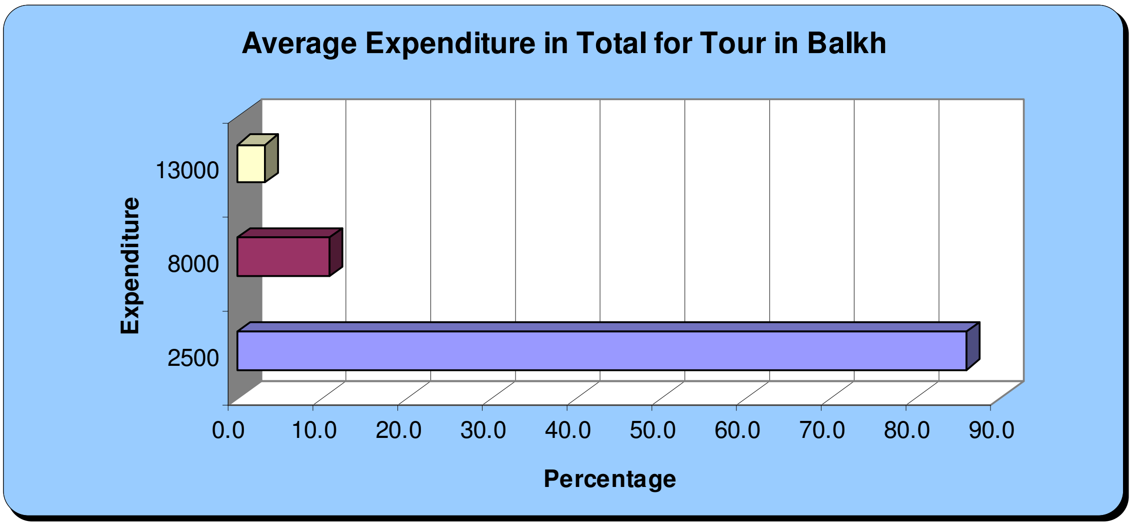
Annex - 5

Average expenditure for tour

Annex – 5a



Annex – 5b



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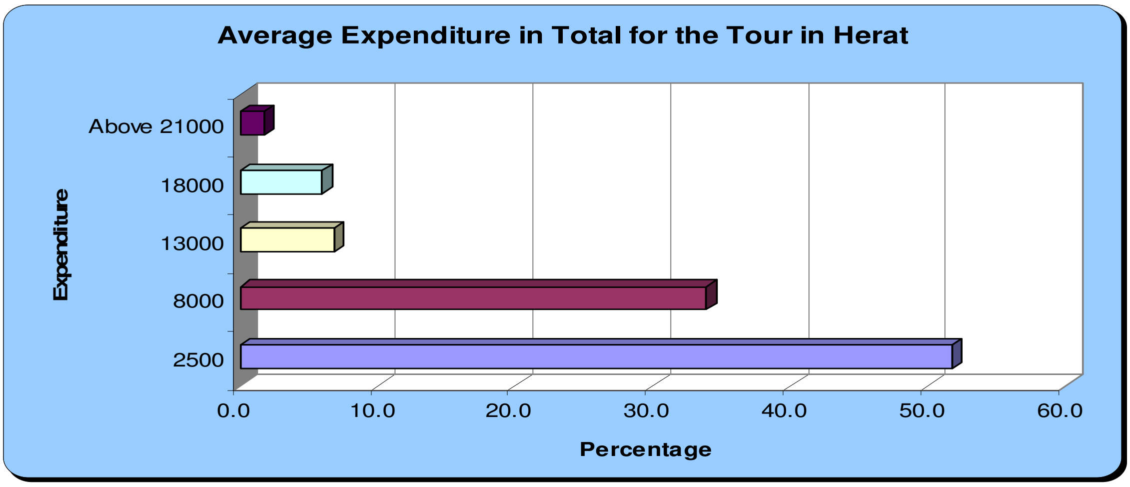

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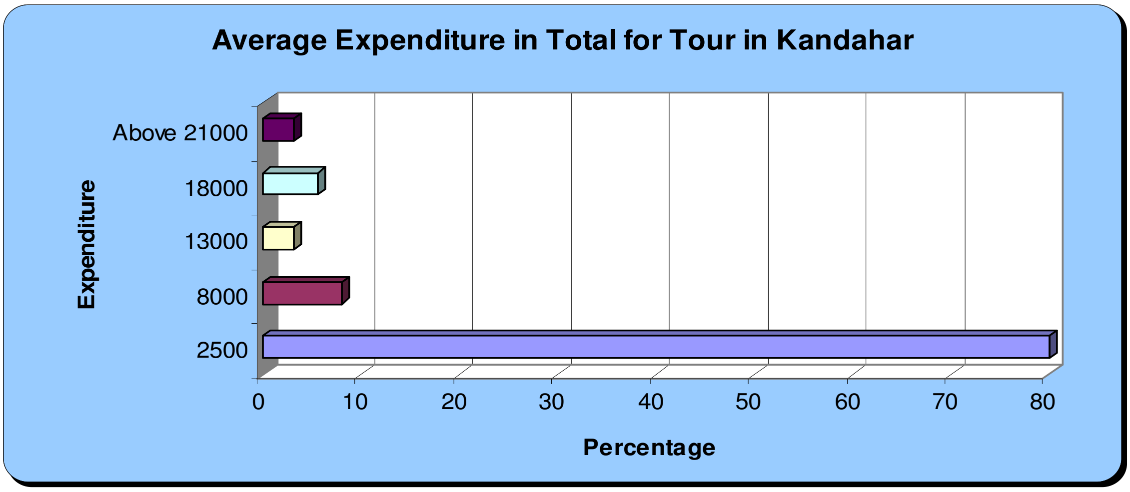

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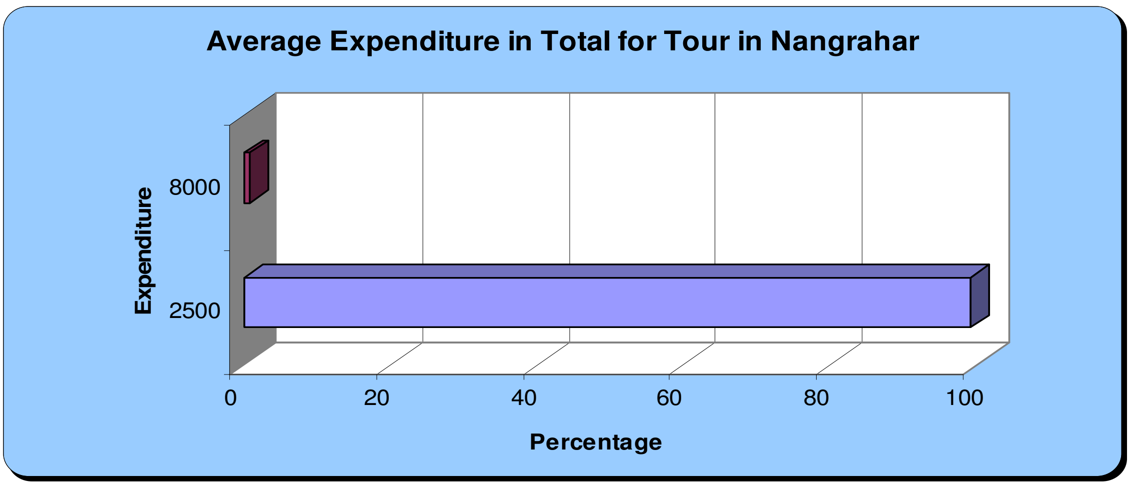
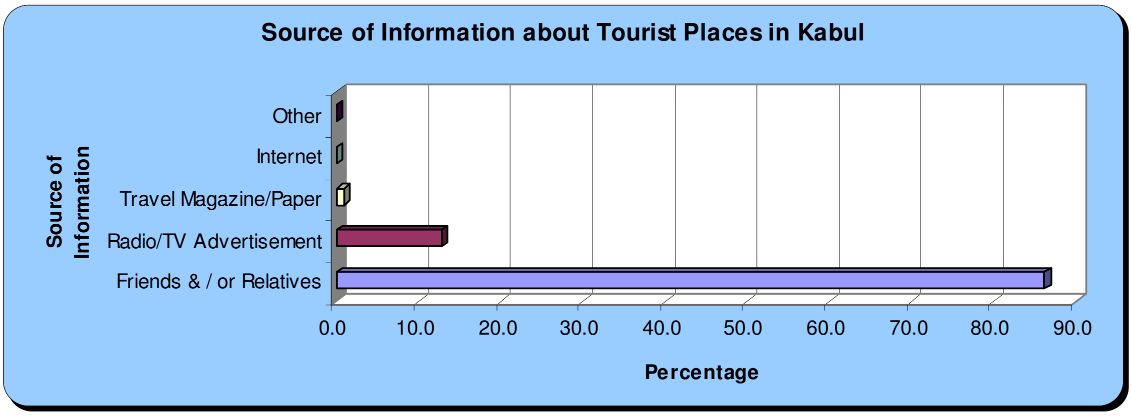


Annex – 6

Source of information about tourist places

Annex – 6a



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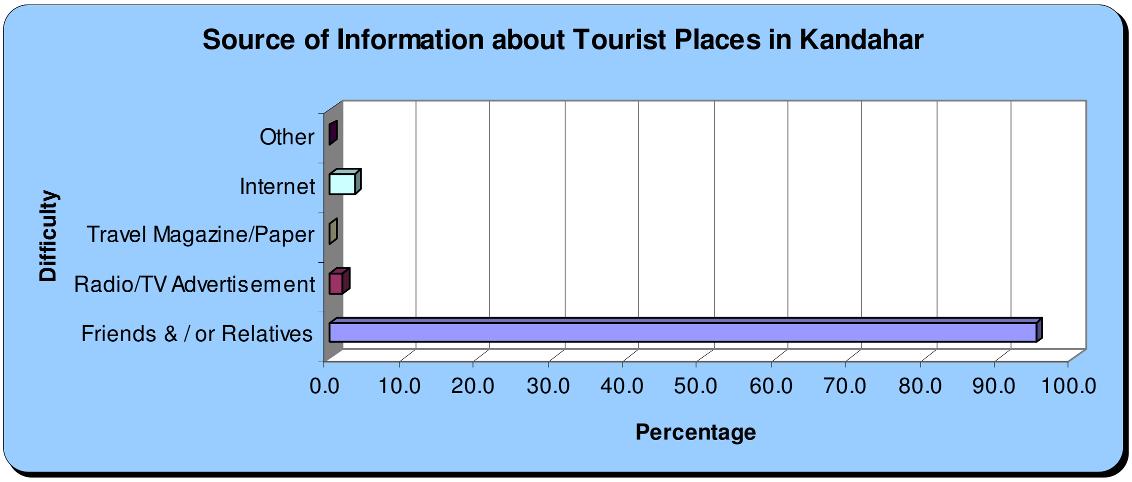
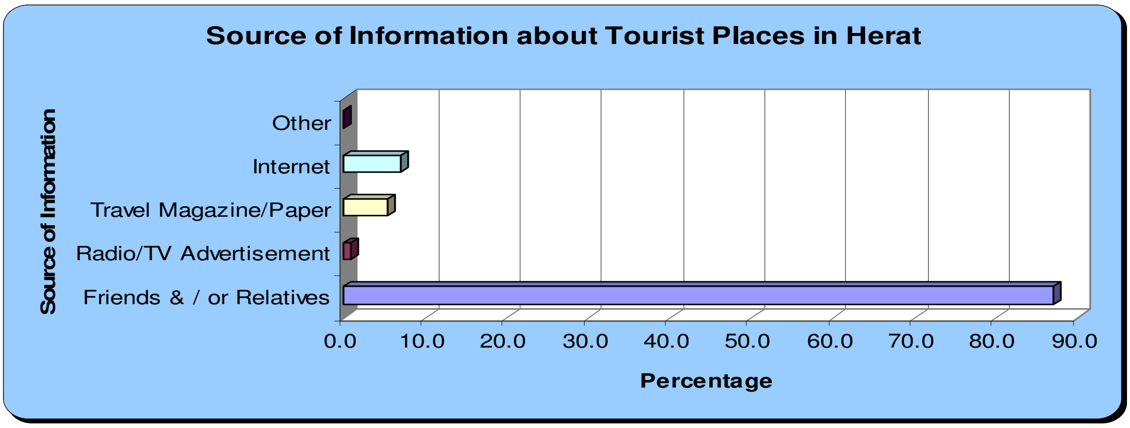


Annex – 6c



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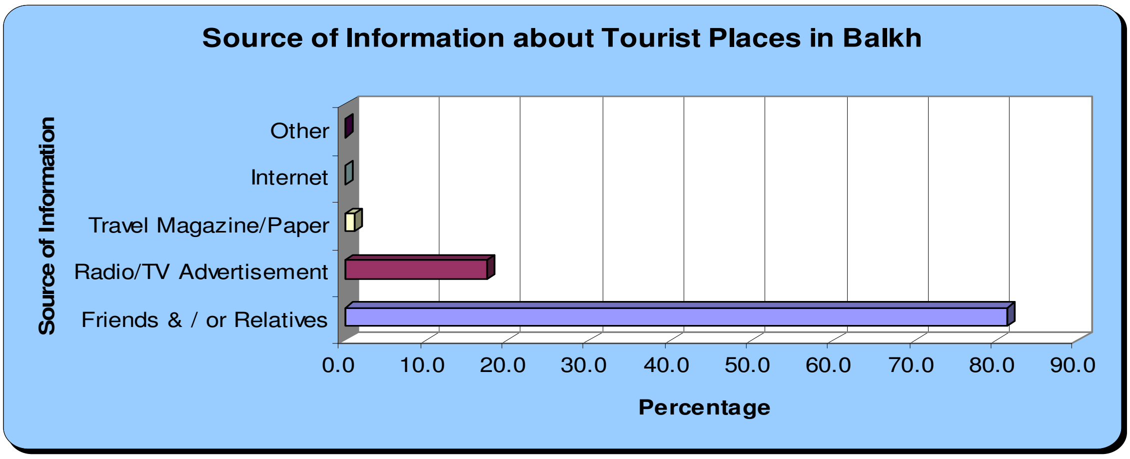

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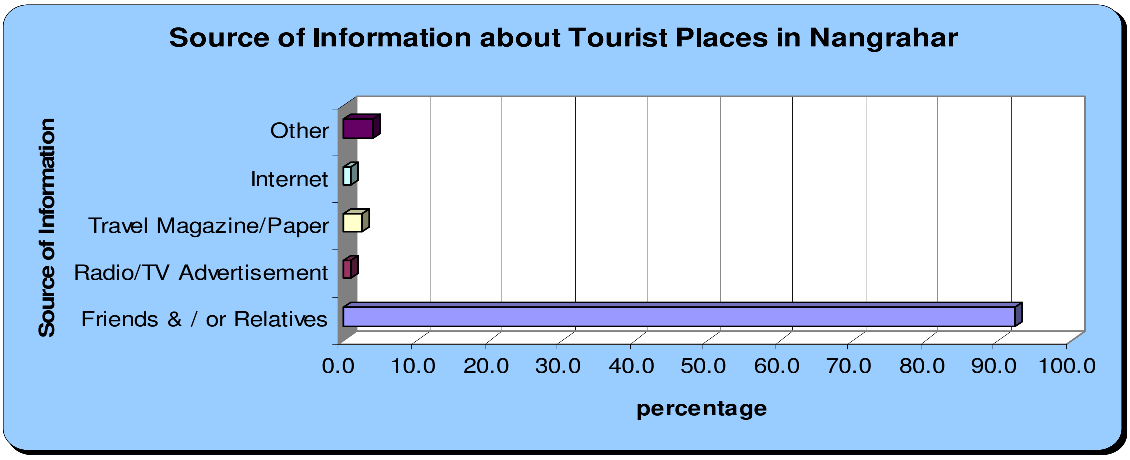
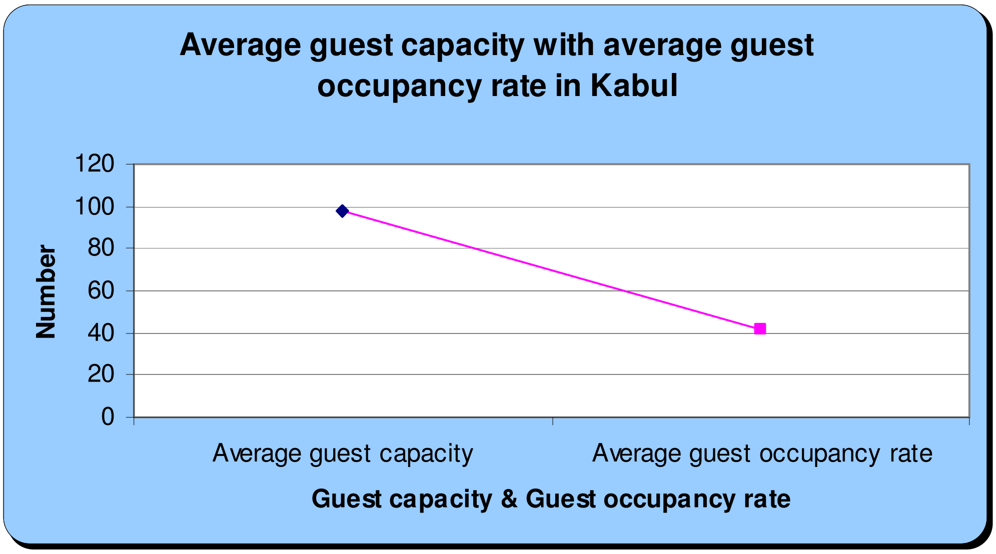


Annex - 7

Average guest capacity and average guest occupancy rate

Annex – 7a



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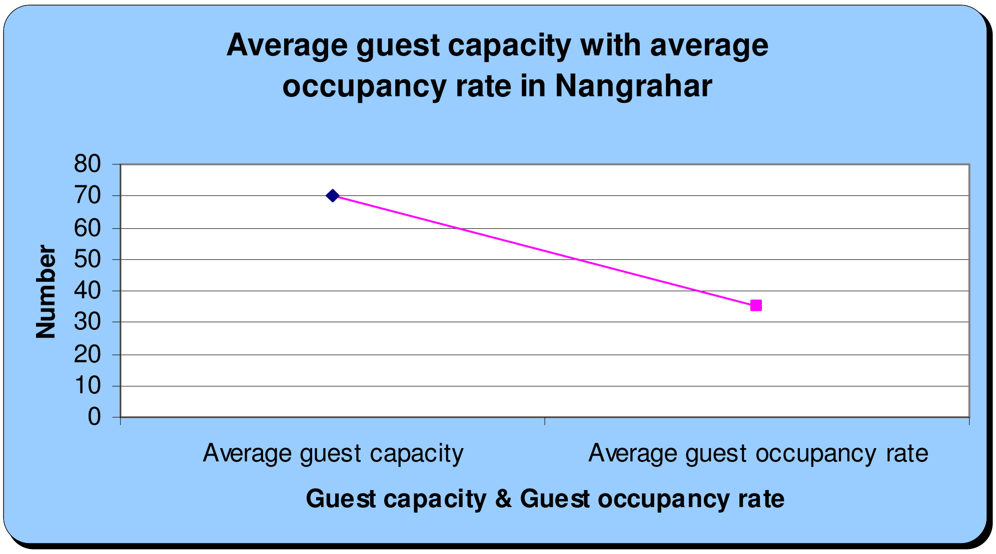
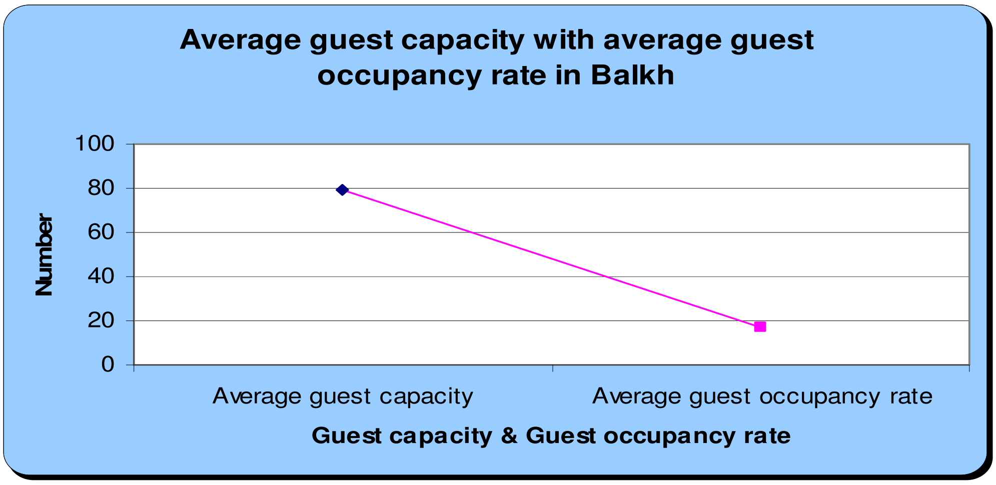
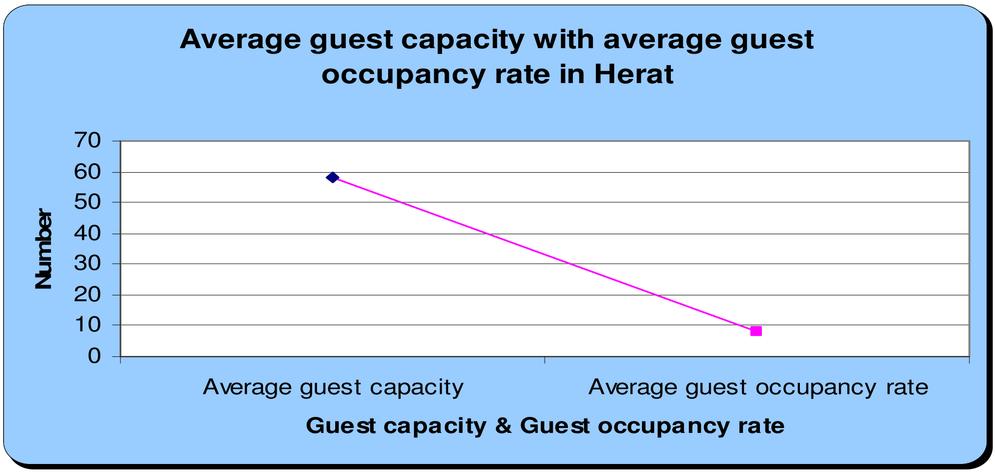


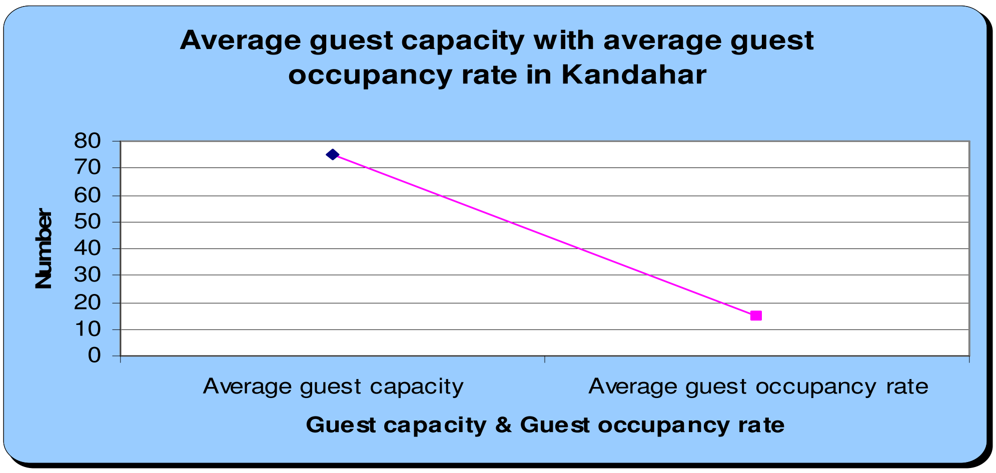
Annex – 7c



Annex – 7d

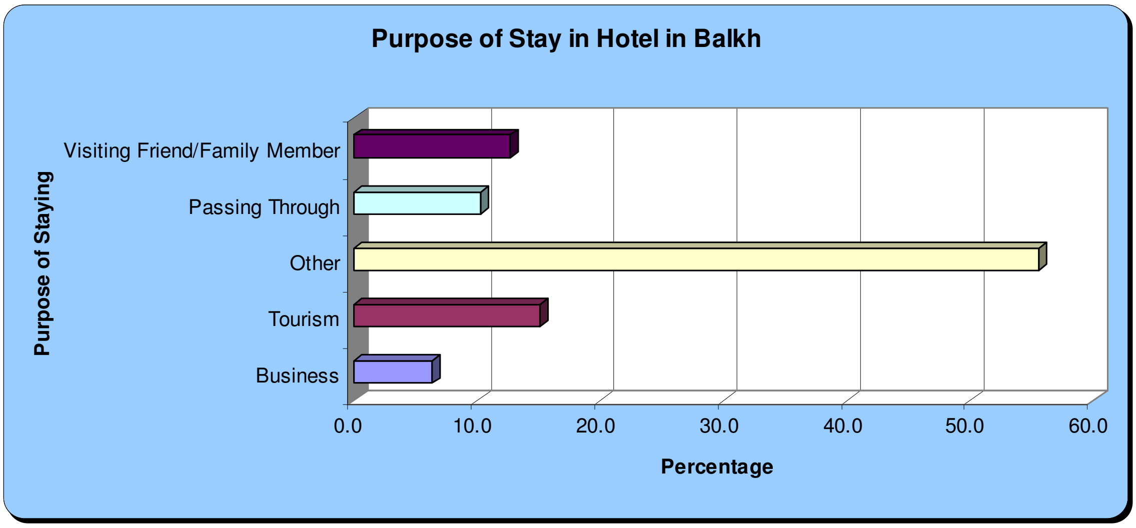


Annex – 7e

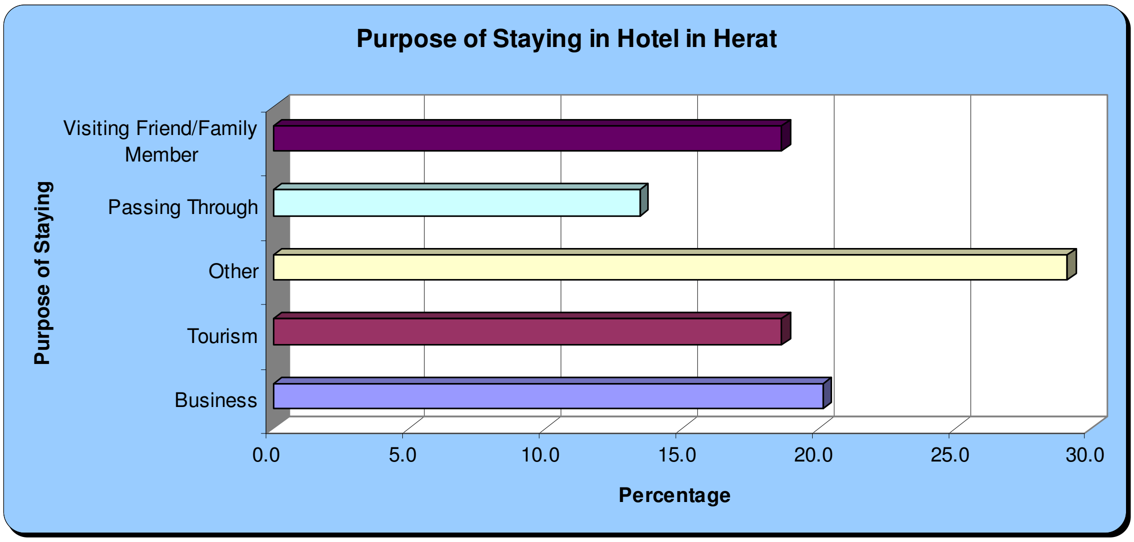


Annex - 8
Purpose of staying in hotel

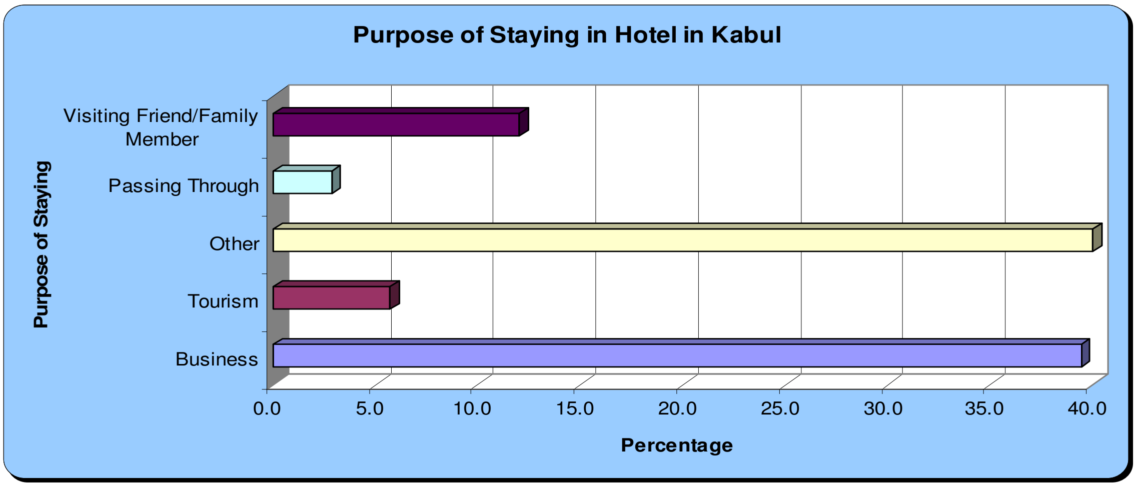
Annex – 8a



Annex – 8b



Annex – 8c



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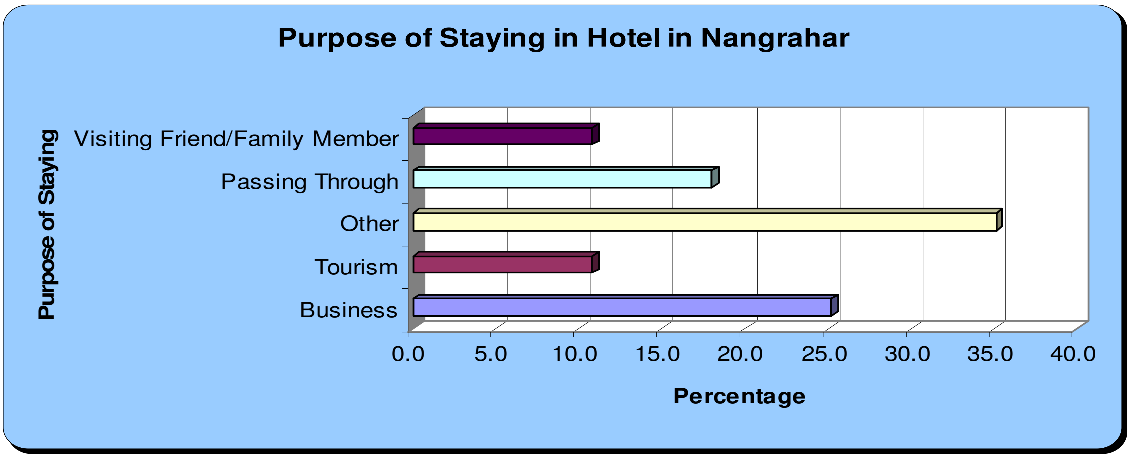

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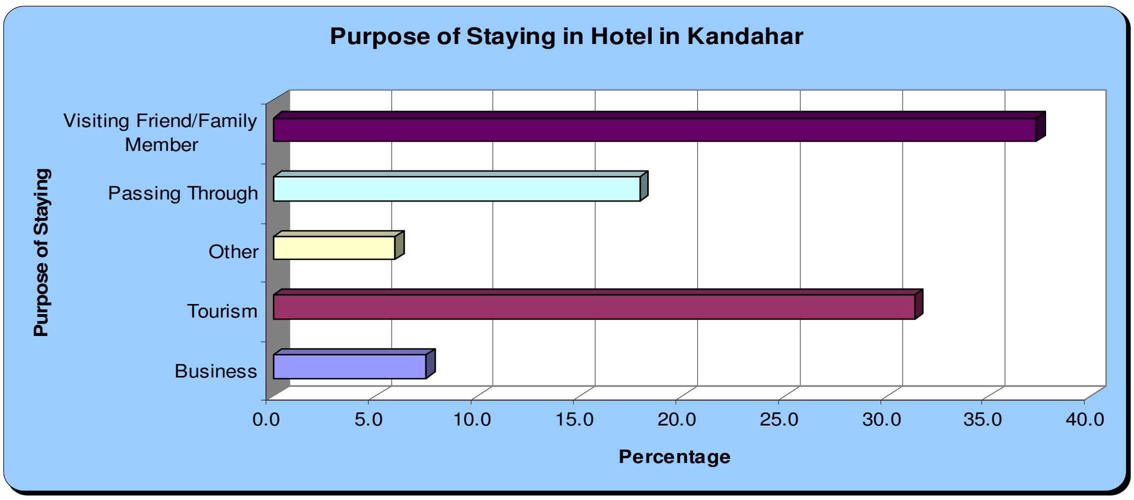
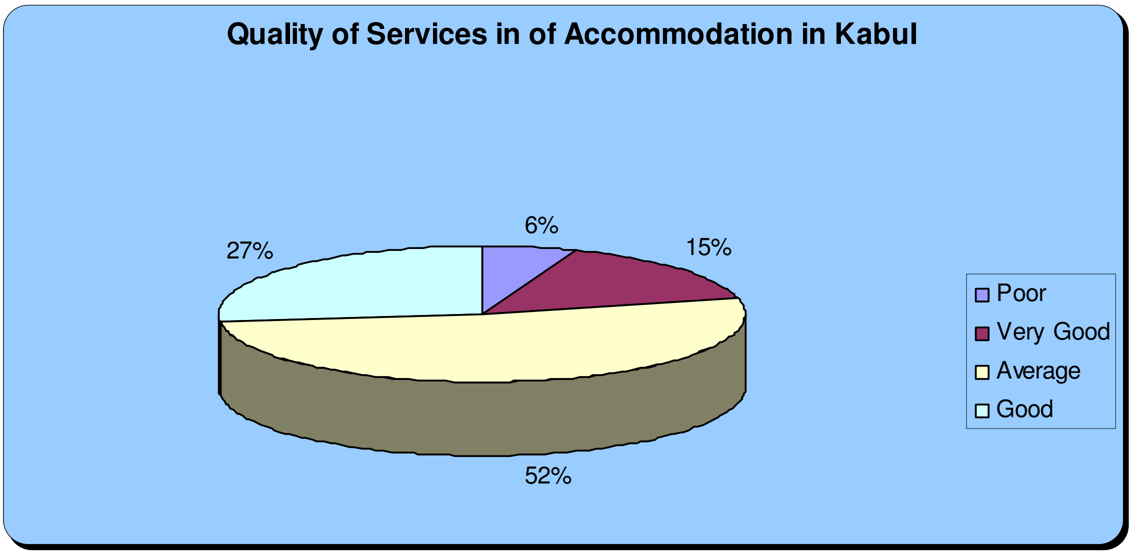


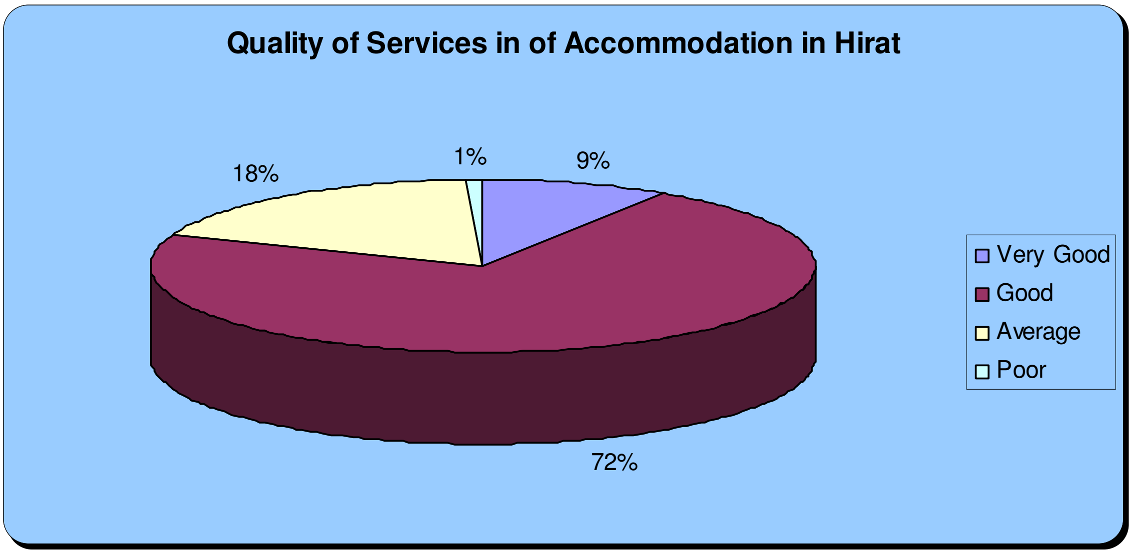
Annex – 9

Quality of services in hotel

Annex – 9a



Annex – 9b



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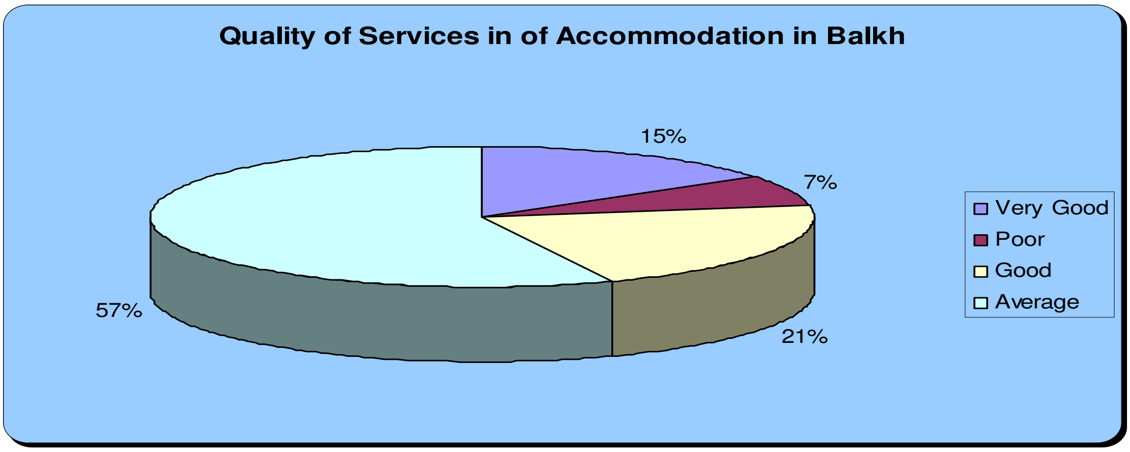
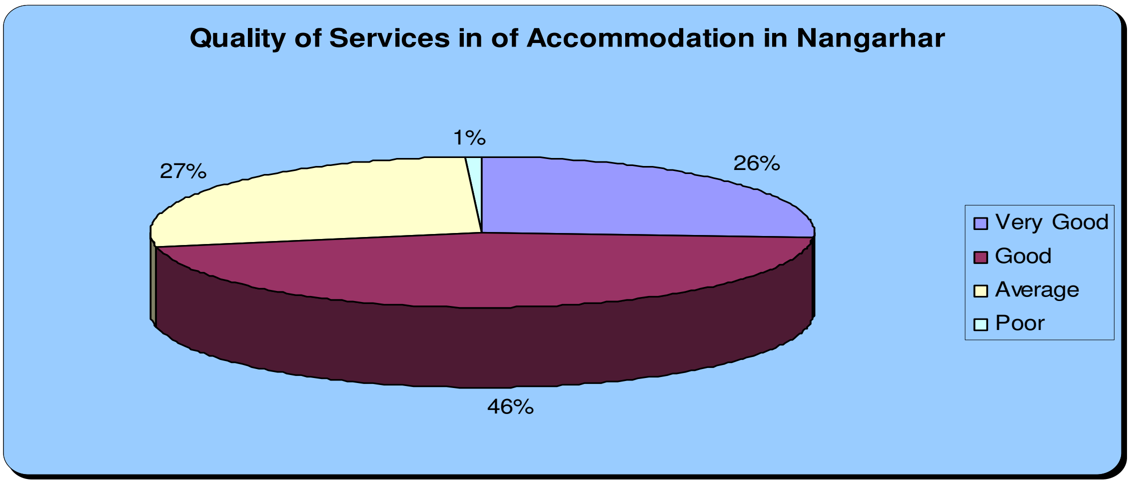
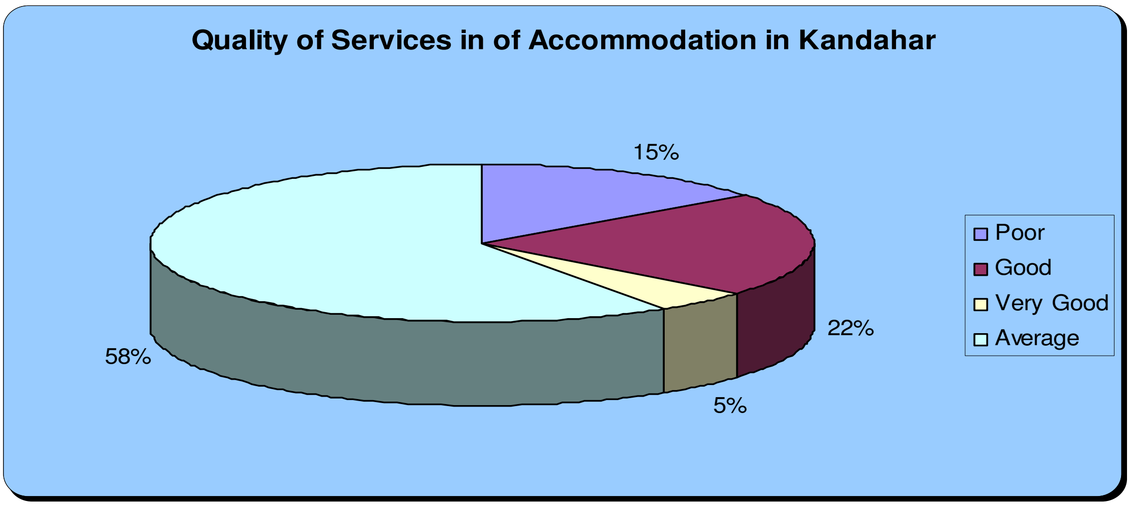


Annex – 9d



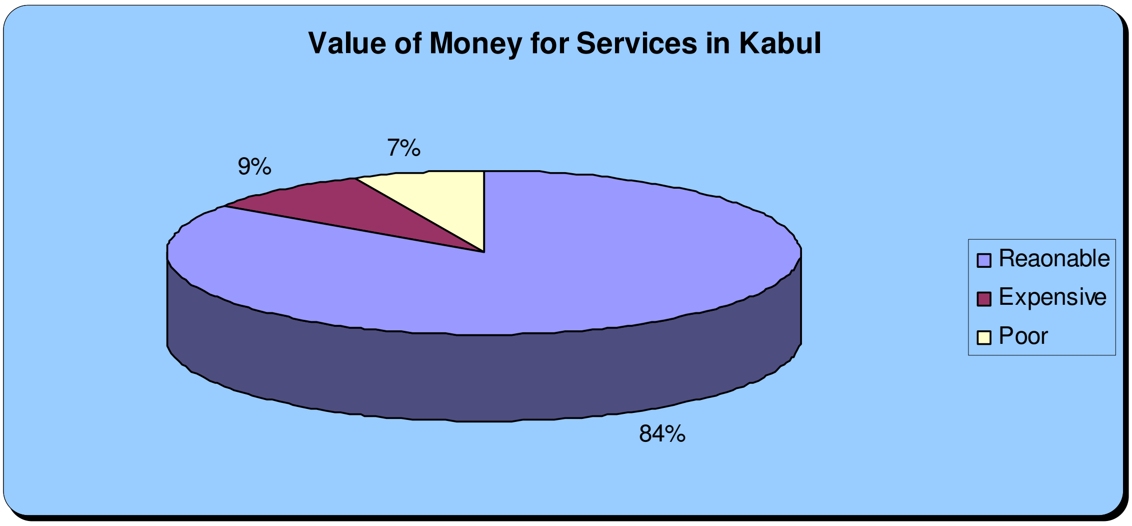
Annex – 9e



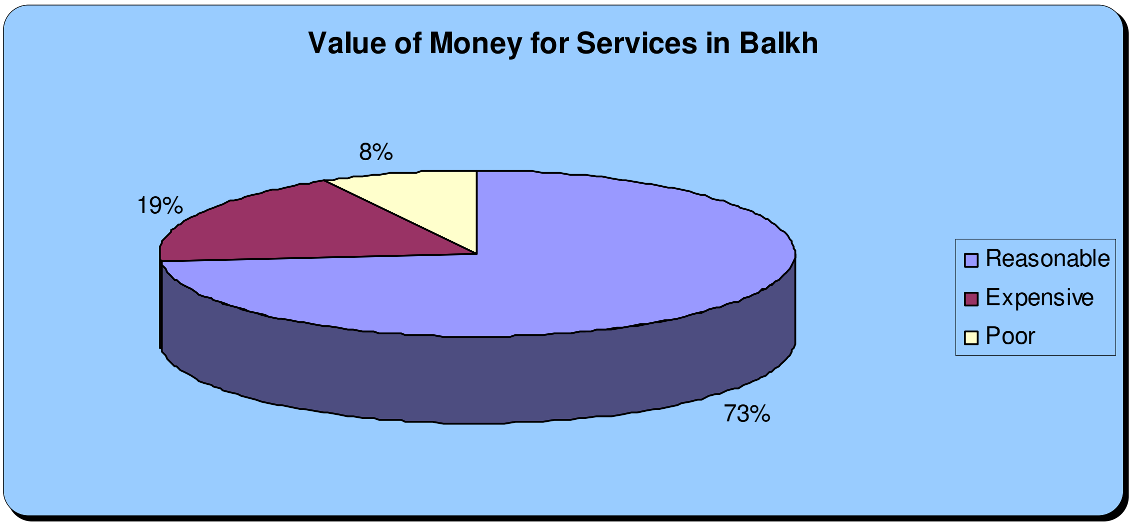
Annex - 10

Value of money for services

Annex – 10a



Annex – 10b



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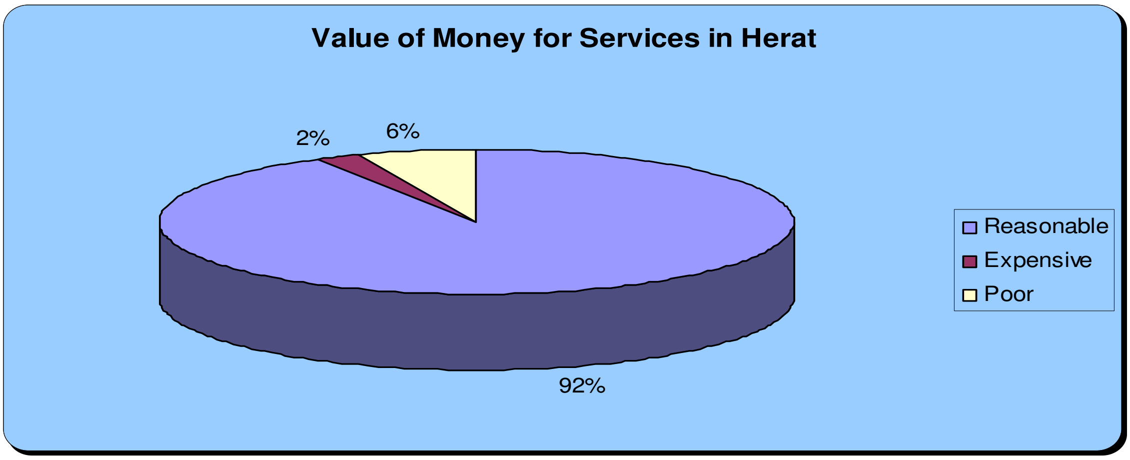
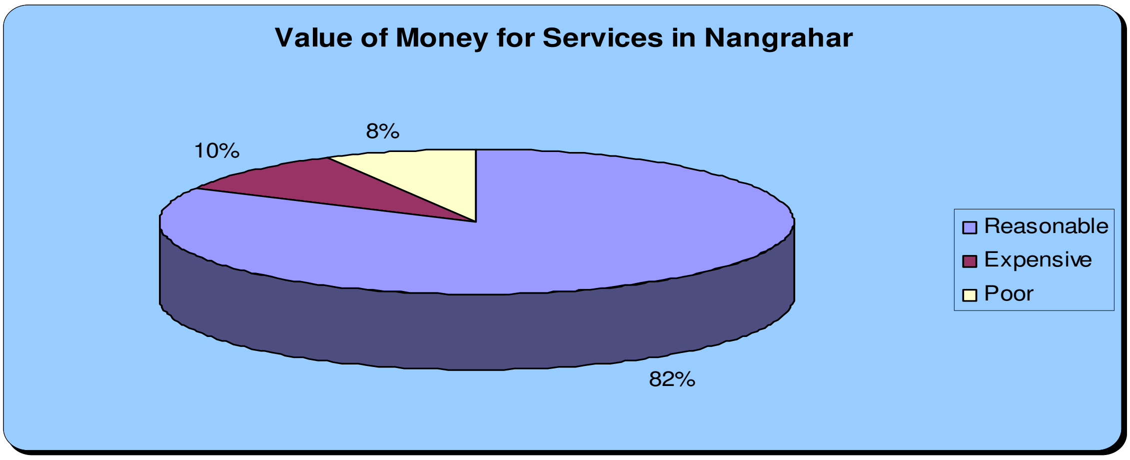
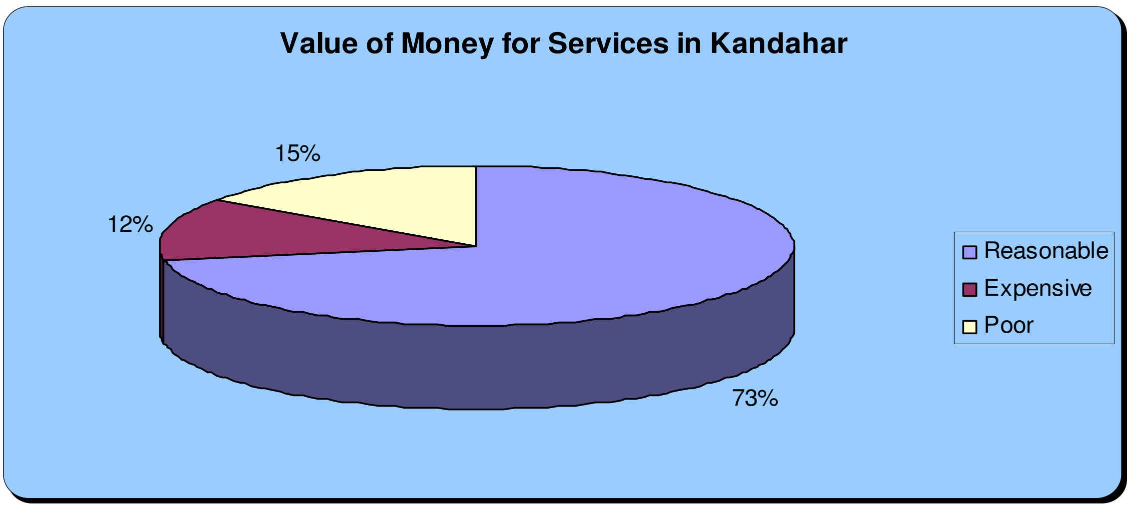


Annex – 10d



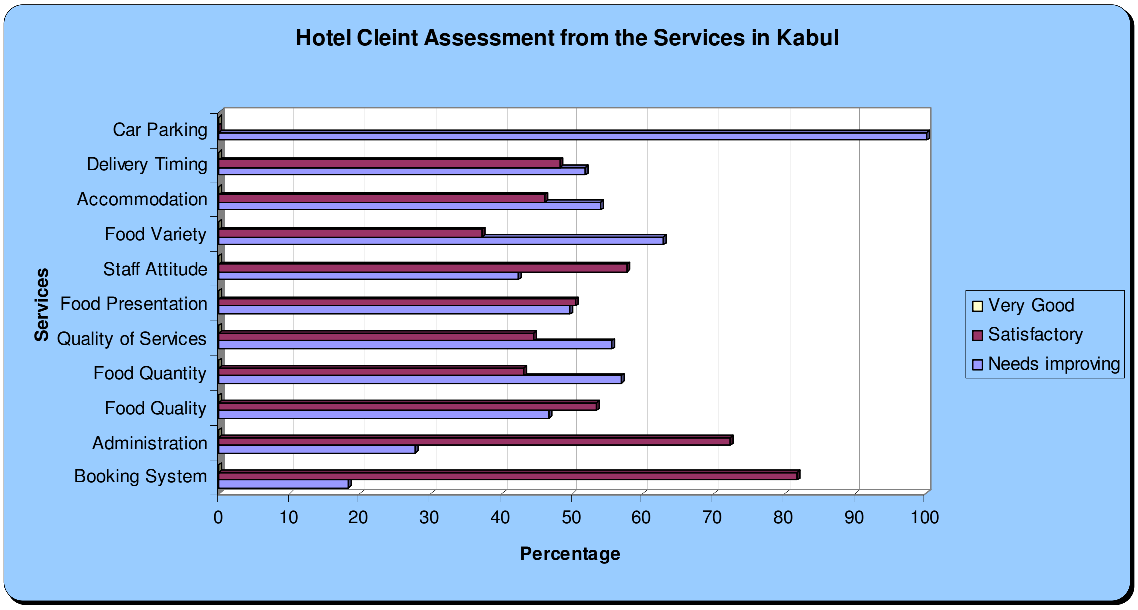
Annex – 10e



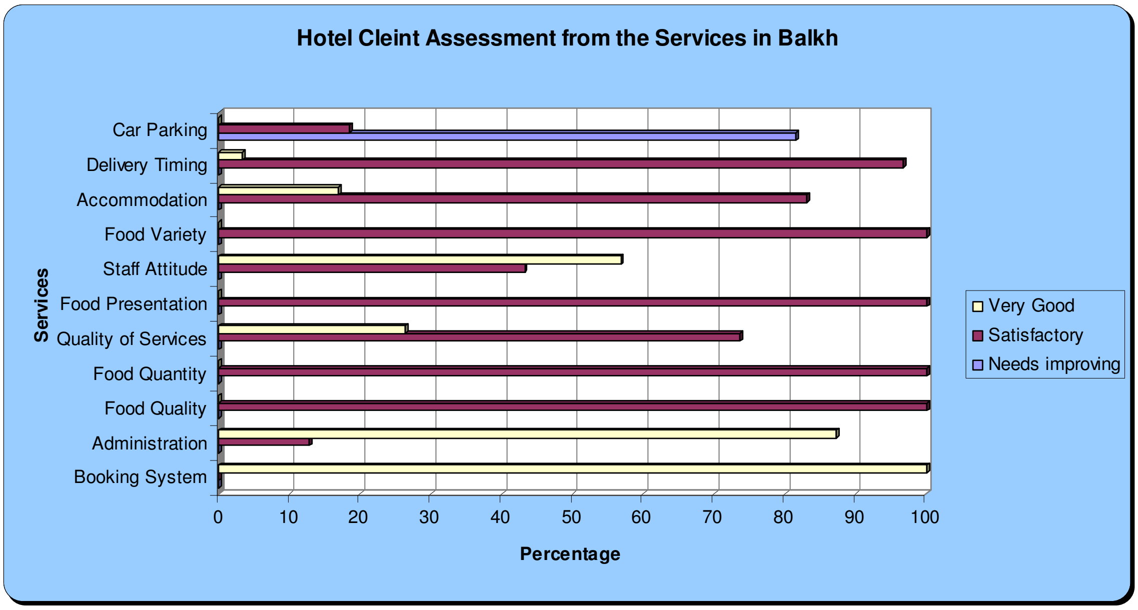
Annex – 11

Hotel client assessment from the services

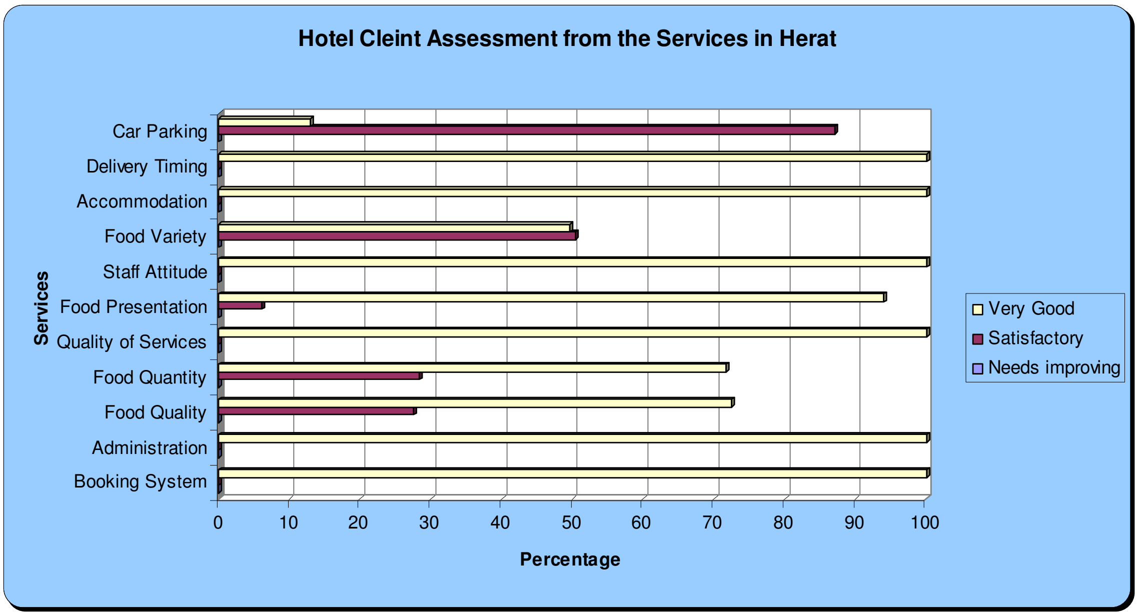
Annex – 11a



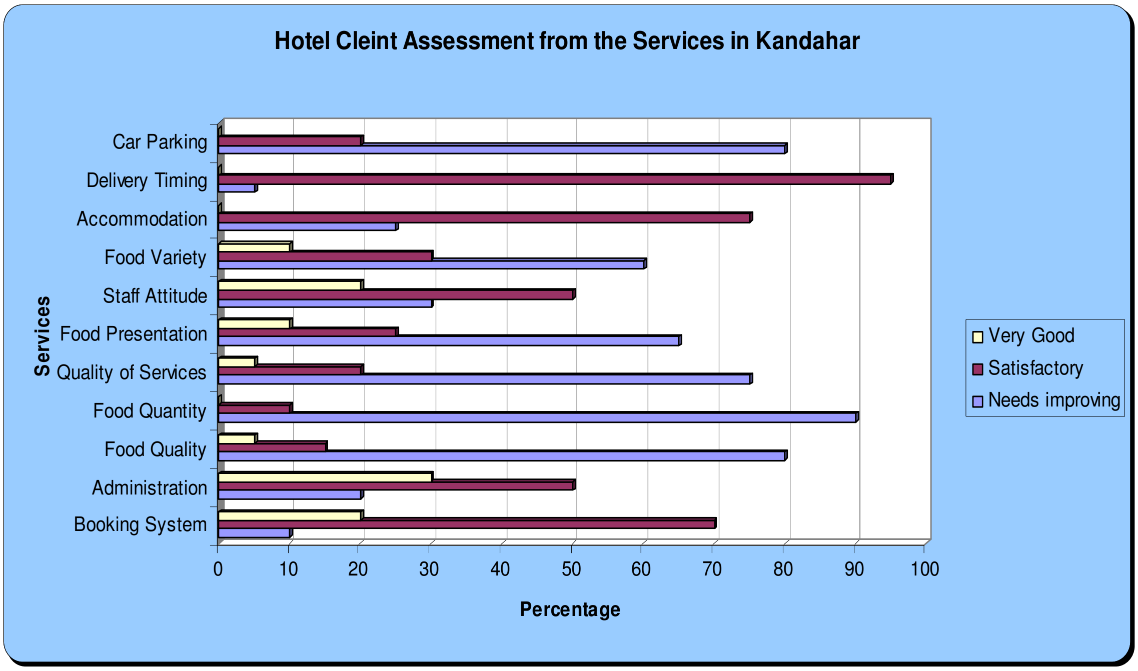
Annex – 11b



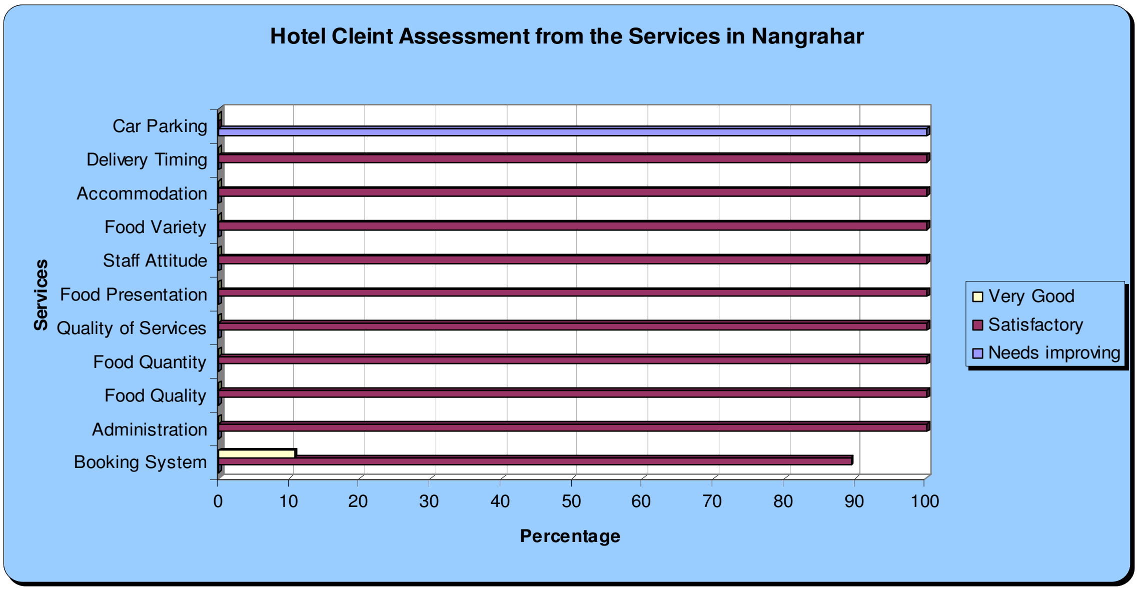
Annex – 11c



Annex – 11d



Annex – 11e



Hotel Cleint Assessment from the Services in Nangrahar
Services
Car Parking
Delivery Timing
Accommodation
Food Variety
Staff Attitude
Food Presentation
Quality of Services
Food Quantity
Food Quality
Administration
Booking System
0
10
20
30
40
50
60
70
80
90
100
Percentage
Very Good
Satisfactory
Needs improving

Part II
Questionnaires

Annex-12a

Media sector-base Questionnaire

(1) General information

Media source name	
Province	
Address	
Director's name	
Phone No	
Email Address	
Year Established	

(2) Status of media source station

(a) Private ☐ (b) Public ☐ (c) NGO

(3) Media type: (a) Local ☐ (b) International ☐

(4) Media Source: TV ☐ Radio ☐ Newspaper ☐ Magazine ☐ Cable ☐

(5) Employee information Data							
4.1 Total Number of current full time employees including owner	4.1.1	**Male**		**Female**		**Total**	
		Local	**Foreigner**	**Local**	**Foreigner**	**Local**	**Foreigner**

4.2 What is Their Job Title , Salary per month , Ave hrs of working /week and working status	Job title	Wage / Salary Afs				Ave hrs of working / week	Working status		
		Less than 5000	5000 – 9999	10000 – 14999	More than 15000		Full time	Part time	Temporary

(6) Proportion programming: (percentage)

(a) News ☐ **(b)** Entertainment ☐ **(c)** Documentary ☐ **(d)** Religion ☐
(e) Science ☐ **(f)** Culture/Arts ☐ **(g)** Other ☐ **Specify:** ……………………………………

(7) Over the last 12 months did the number of employees: **(a)** Decline ☐ **(b)** Remain Stable ☐ **(c)** Grow ☐

(7.1) If; **(a)** Decline by how many ☐ % **(b)** Grow by how many ☐ %

(8) When hiring new employees, how would you rate the overall degree of difficulty you have in getting qualified applicants?

(a) For-non-management positions in which previous experience is not required.
Not difficult ☐ Quite difficult ☐ Very difficult ☐
(b) For-non-management which previous experience is required.
Not difficult ☐ Quite difficult ☐ Very difficult ☐
(c) For management (but not experience management) Positions in which previous experience is not required.
Not difficult ☐ Quite difficult ☐ Very difficult ☐
(d) For management (but not experience management) Positions in which previous experience is required.
Not difficult ☐ Quite difficult ☐ Very difficult ☐

(9) How do you recruit new employees? (Tick the relevant box)

(a) Internal transfer ☐
(b) Reference from other employers ☐
(c) Reference from other employees ☐
(d) Job seeker direct approach ☐
(e) Registration at an employment centre ☐
(f) Directly from training centre ☐
(g) Others ☐

Specify ……

(10) Do you employ foreigners? Yes ☐ No ☐ **If yes, how many?** ☐

If yes, in which occupation?

(a) Management/Administrative skills ☐
(b) Technical Skills ☐
(c) Journalists ☐
(d) Others ☐

Specify ………..…..

(11) What are the main sources of finance?

(a) Advertising	%
(b) Sales of publication	%
(c) Other	%
Percentage in total:	**100%**

Explain: ……………………………………………………………..

(12) What is your daily estimated range of circulation, number of listeners or viewers in Afghanistan? ☐

(13) Please list main skill areas you would suggest for training courses designed for your employees?

(a) ……………………………. **(b)** ……………………………. **(c)** ……………………………. **(d)** ……………………

Enumerator's name ………………**Respondent's name** ……………………**Position** ……………………**Date: / /**

Annex - 12b

Media opinion poll Questionnaire

1.1: Province name ☐ 1.2: City name ☐ 1.3: Location ☐

2: Respondent name ________________ 2.1: Occupation __________________ 2.2: Sex: (a) Male ☐ (b) Female ☐

2.3: Education level: (a) Illiterate ☐ (b) Primary ☐ (c) Middle ☐ (d) High school ☐ (e) University ☐

2.4: Age: ☐ Phone No: ☐

3: For News and Entertainment what you have at your home?

(a): TV ☐ (b): Radio ☐ (c): Bring Newspaper/magazine ☐ (d): Computer/Internet ☐

(e) Cable ☐ (f) Tape Recorder ☐ (g) CD/DVD ☐ (h) None of them ☐ (i) Other ☐ Specify: ____________

4: In a normal day, on average, how many hours do you spend doing each of the following (please √ the relevant box)

Name of Media	Time Spending				
	No time	Less than 1 hrs	1-2 hrs	2-4 hrs	Over 4 hrs
Watching TV					
Listening to the Radio					
Reading Newspaper					
Reading books for leisure					
Using internet					

5: How often do you access the news?

(a): Every day ☐ (b) 3 time per week ☐ (c) 1 time per week ☐

6: How do you access news?

Newspaper ☐ Radio ☐ TV ☐ Internet ☐

7: Which of the following are your top 4 favorite types of Entertainment?

(a): News ☐ (b): Sports ☐ (c): Soaps ☐ (d): Celebrities ☐ (e): Documentary ☐
(f): History ☐ (g): Religion ☐ (h): Drama ☐ (I): Action adventure ☐ (j): Comedy ☐
(k): Music ☐ (L): Science fiction ☐ (m): Arts ☐ (n): Romance ☐ (o): Crime ☐
(p): Science ☐ (q) None of them ☐

8: Which of these sources are most useful in providing you with general news and information? (Identify top 4)

(a): TV News ☐ (b): Radio News ☐ (c): National/Local Newspaper ☐ (d): Magazine ☐

(e): Internet ☐ (f): Personal experience ☐ (g): Educational Environment ☐ (h): Friends/ Family/Colleges ☐

(I): Mosque ☐ (J): Other People ☐

9: Are you satisfied with media coverage of news and public issues? Yes ☐ No ☐
9.1: If no, what changes would you like to see? ……………………………………………………………………………………..
10: Are you satisfied with the entertainment available on Radio and TV? Yes ☐ No ☐
10.1: If no, what changes would you like to see? ……………………………………………………………………………………

Enumerator's name: ____________________________ Completion date: / /1387

Annex - 13a:

Travel/Tourist Company Questionnaire

1.0 Tourist's Company Questionnaire

1.1 Province	1.2 City	1.3 Location

1.4 Tourist Company Name: ____________ Year of establishment: ____________

1.5 Owner's Name: ____________ Mobile No: ____________

2.0 Employee Information

2.1: Total number of current full time employees including owner	2.1.1	Male		Female		Total	
		Local	Foreigner	Local	Foreigner	Local	Foreigner
		( )	( )	( )	( )	( )	( )

2.2 What is Their Job Title , Salary per month , Ave hrs of working /week and working status	Job title	Wage / Salary(Afs)				Ave hrs of working/week	Working status		
		Less than 5000	5000 – 9999	10000 – 14999	More than 15000		Full time	Part time	Temporary

(3) What type services does your company provide?..

(4) What type of tours do you mainly provide?

(a) Cultural/Heritage ☐ (b) Nature (wild life, camping) ☐ (c) Nature/Adventure (biking, Horse back riding, trekking) ☐

(d) Boat tours ☐ (e) Other ☐ Explain: ....

(5) Approximately how many customers do you serve on average each year? ☐

(6) Over the last 12 months did the number of employees:

(a) Decline ☐ (b) Remain Stable ☐ (c) Grow ☐

(6.1) If:
(a) Decline by how many ☐ % (b) Grow by how many ☐ %

(7) When hiring new employees, how would you rate the overall degree of difficulty you have in getting qualified applicants?

(e) For-non-management positions in which previous experience is not required
Not difficult ☐ Quite difficult ☐ Very difficult ☐
(f) For-non-management which previous experience is required.
Not difficult ☐ Quite difficult ☐ Very difficult ☐
(g) For management (but not experience management) Positions in which previous experience is not required.
Not difficult ☐ Quite difficult ☐ Very difficult ☐
(h) For management (but not experience management) Positions in which previous experience is required.
Not difficult ☐ Quite difficult ☐ Very difficult ☐

(8) Please list the main skill areas you would suggest for training courses designed for employees?

(a) ____________________ (b) _____________________ (c) _____________________ (d) ___________________

(9) What percent of your tourists is, Local: [%] Foreigner? [%]

(10) Have the numbers of tourists visiting your tourist places increased in the last year? Yes [ ] No [ ]

(11) What main services & improvements are needed in Afghanistan to make it more comfortable for tourists? [ ]

(12) What is your suggestion for future tourism development in the area? [ ]

Enumerator's name________________________ **Completion date / / 1387**

Annex -13b

Tourists' Opinion Questionnaire

1: Province Name ☐ 1.1: City Name ☐ 1.2: Location ☐

2: Respondent Name: ____________________________ 2.1 Tourist place name: _____________________

2.2 Respondent tourist status: (a) Local ☐ (c) Foreigner ☐ 2.3 Occupation: ☐

2.3 Education Level: (a) Illiterate ☐ (b) Primary ☐ (c) Middle ☐ (d) High school ☐ (e) University ☐

2.4 Sex: (a) Male ☐ (b) Female ☐ 2.5 Age ☐ Mobile/Telephone: ☐

3: How did you organize this trip?

(a) Through tour operator ☐ (b) Travel Agency ☐ (c) Internet ☐ (d) On your own ☐

4: Do you have difficulties in organizing your tour? Yes ☐ No ☐

If yes, what are the difficulties?
(a) Flight booking ☐ (b) Unavailability of information ☐ (c) Accommodation ☐

(d) Acquiring Visa ☐ (d) Others ☐ Explain:…………………………………………………………

5: If you have traveled outside Afghanistan, how do you compare Afghanistan tourist places with other countries?
………..

6: How can the government encourage tourists to come to Afghanistan?
(a) Providing more security for tourists. ☐
(b) Advertise tourist places through the media. ☐
(c) Attract investors to invest in the tourism sector in Afghanistan. ☐

(d) Reconstruct roads to enable the tourist to visit tourist places more easily? ☐
(e) Other ☐
Explain ……………………………………………………………………………………………

7: What is the best season for tourism in Afghanistan?

(a) Spring ☐ (b) Summer ☐ (c) Autumn ☐ (d) Winter ☐

7.1 Why: Explain ……………………………………………………………………………………………

8: How did you hear about this tourist place?

(a) Friends and / or relatives ☐ (c) Radio TV advertising ☐

(d) Read about this in travel magazine / paper ☐ (e) Internet ☐ (f) Other ☐
Explain:-……………………………………………………………………………………………

9: Approximately how much did you spend in total on this visit?
(a) Below 5000 Afs ☐ (b) 6000 – 10000 Afs ☐ (c) 11000 – 15000 Afs ☐
(d) 16000 – 20000 Afs ☐ (e) above 21000 Afs ☐

10: Would you recommend this place as a tourist destination to others? Yes ☐ No ☐
If no, Please specify the reason
……………………………………………………………………………………………

11: What are your suggestions for future tourism development in Afghanistan?
……………………………………………………………………………………………

12: In your opinion which the best attraction for tourism in Afghanistan?
……………………………………………………………………………………………

13: What can the Government do to promote tourism in Afghanistan/ in your own country?
……………………………………………………………………………………………

Enumerator's name: ______________________ Completion date: / /

Annex -14a

Hotel and Guesthouse Questionnaire

1.1 Province	1.2 City	1.3 Location

1.4 Hotel/Guesthouse's Name: 1.5 Year of establishment:

1.6 Owner's Name: Phone No:

<table>
<tr><th colspan="11">2.0 Employee Information</th></tr>
<tr><td rowspan="3">2.1
Number of current full time employees including owner</td><td rowspan="3">2.1.1</td><td colspan="4">Male</td><td colspan="3">Female</td><td colspan="2">Total</td></tr>
<tr><td colspan="2">Local</td><td colspan="2">Foreigner</td><td>Local</td><td colspan="2">Foreigner</td><td>Local</td><td>Foreigner</td></tr>
<tr><td colspan="2">( )</td><td colspan="2">( )</td><td>( )</td><td colspan="2">( )</td><td>( )</td><td>( )</td></tr>
<tr><td rowspan="8">2.2
What is Their Job Title , Salary per month , Ave hrs of working /week and working status</td><td rowspan="2">Job title</td><td colspan="5">Wage / Salary(Afs)</td><td rowspan="2">Ave hrs of working/week</td><td colspan="3">Working status</td></tr>
<tr><td>Unpaid</td><td>Less than 5000</td><td>5000 – 9999</td><td>10000 – 14999</td><td>More than 15000</td><td>Full time</td><td>Part time</td><td>Temporary</td></tr>
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</table>

(3) What is your guest capacity? [ ]

(4) What is your guest average occupancy rate? [ ]

(5) What is the average price of room? High ……………Afs. Mid ……………Afs. Low ……………..Afs.

(6) Over the last 12 months did the number of employees:

(a) Decline [ ] (b) Remain Stable [ ] (c) Increase [ ]

(6.1) If:

(a) Percentage of decline [%] (b) Percentage of increase [%]

(7) When hiring new employees, how would you rate the overall degree of difficulty you have in getting qualified applicants?

(i) For-non-management positions in which previous experience is not required
Not difficult [ ] Quite difficult [ ] Very difficult [ ]

(j) For-non-management which previous experience is required
Not difficult [ ] Quite difficult [ ] Very difficult [ ]

(k) For management (but not experience management) Positions in which previous experience is not required.
Not difficult [ ] Quite difficult [ ] Very difficult [ ]

(l) For management (but not experience management) Positions in which previous experience is required.
Not difficult [ ] Quite difficult [ ] Very difficult [ ]

(8) How do you market your business?

(a) Nationally:..(b) Internationally:………………………………………………

(9) Please list the main skill areas you would suggest for training courses designed for your employees?

(a) ____________________ (b) _____________________ (c) _________________________ (d) ____________________

Enumerator's name: _______________________________ Completion date: / / 1387

Annex -14b

Hotel Clients Questionnaire

1: Province Name ☐ 1.1: City Name ☐ 1.2: Location ☐

2: Respondent Name: ____________________ 2.1 Respondent nationality: (a) Local ☐ (c) Foreigner ☐

2.2 Education Level: (a) Illiterate ☐ (b) Primary ☐ (c) Middle ☐ (d) High school (e) University ☐

2.3 Occupation: ☐

2.4 Age ☐ 2.5. Sex: (a) Male ☐ (b) Female ☐ Mobile/Telephone: ☐

3: Why you are staying in this hotel?

(a) Business ☐ (b) Tourism ☐ (d) Visit friend or family member ☐ (d) Passing through ☐

(h) Other ☐ Explain ………………………………………………………………………………………….

4: How is quality of services of accommodation in this hotel?

(a) Poor ☐ (b) Average ☐ (c) Good ☐ (d) Very Good ☐

5: How is the value of money for accommodation in this hotel?

(a) Poor ☐ (b) Reasonable ☐ (c) Expensive ☐

6: What facilities are available to you?

(a) Internet ☐ (b) Transportation ☐ (c) TV ☐ (d) Room services ☐ (e) Other ☐
Explain: ______________________________________

7: How did you find out about this Hotel?
(a) Internet ☐ (b) Hotel brochure ☐ (c) Referred by previous guests/Friends ☐ (d) Tourism department ☐

(e) Other ☐ Explain: ______________________________________

8: (Please tick (✓) only one box in front of each service name)

Service names	**Very Good**	**Satisfactory**	**Needs Improving**
Booking System			
Administration			
Food Quality			
Food Quantity			
Quality of Service			
Food Presentation			
Staff Attitude			
Food Variety			
Accommodation			
Delivery Timing			
Car Parking Facility			

Surveyor's Name: ____________________ Completion date: /

Annex -15
Sample Distribution Table

S/No	Province	Media Planned	Media Actual	MOP Planned	MOP Actual	T.C Planned	T.C Actual	T.O.P Planned	T.O.P Actual	H&G Planned	H&G Actual	H.C Planned	H.C Actual
1	Kabul	170	170	150	186	95	74	121	151	37	40	136	130
2	Nangrahar	17	24	150	167	4	4	128	140	9	10	103	110
3	Balkh	35	36	150	178	6	4	93	104	18	19	125	144
4	Herat	26	30	150	164	3	3	121	133	24	23	130	144
5	Kandahar	14	9	150	162	6	6	125	140	24	24	130	110
Total		262	269	750	857	114	91	588	668	112	116	624	638
Total planned		2450									Total actual		2639

Legend

A) Media: (TV, Radio, Newspaper, Magazine and Cable Network) B) MOP: Media Opinion Poll
C) TC: Travel Agency /Tourist Company D) TOP: Tourist Opinion Poll E) H&G: Hotel & Guest house F) HC: Hotel Client

Note:
Only the planned numbers of forms were entered into the database but incase of number of actual forms less than the number of forms planned then the number of actual form were entered into the database. The numbers of media forms were subdivided by media types as well as travel agencies and tourist companies and hotel and guesthouses.