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Comparing the Impact of All-Inclusive and Non All-Inclusive Tourism Models on the Quality of Jobs for Women



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¹ UFGE is a multi-donor trust fund dedicated to strengthening awareness, knowledge and capacity for gender-informed policy-making.

KEY FINDINGS

All-inclusive vs non-all-inclusive

- ❖ **Non-all-inclusive hotels make up the majority of hotels in St. Lucia and Grenada:** only 27% of hotels in St. Lucia and 28% in Grenada offer all-inclusive services.
- ❖ **All-inclusive hotels are significantly larger than non-all-inclusive hotels:** The typical all-inclusive hotel has about 6.5 times more rooms in St. Lucia and about 6 times more rooms in Grenada, compared to the typical non-all-inclusive hotel.
- ❖ **All-inclusive hotels provide more jobs than non-all-inclusive hotels:** All-inclusive hotels provide 76% of the hotel employment in St. Lucia and 71% in Grenada.
- ❖ **All-inclusive hotels provide more benefits to employees than non-all-inclusive hotels:** in St. Lucia, 94% of all-inclusive hotels offer free or subsidized meals and 94% offer free or subsidized transport, compared to 31% and 24% of non-all-inclusive hotels, respectively.
- ❖ **All-inclusive hotels are more likely than non-all-inclusive hotels to offer training programs to employees:** In St. Lucia, 46% of all-inclusive hotels offered training, compared to 15% of non-all-inclusive hotels. In Grenada, 68% of all-inclusive hotels offered training, compare to 25% of non-all-inclusive hotels.
- ❖ **Employees at all-inclusive hotels expressed lower overall job satisfaction than employees at non-all-inclusive hotels, but the difference is only statistically significant in St. Lucia:** satisfaction among all-inclusive hotel employees is 76% in St. Lucia and 82% in Grenada, while among non-all-inclusive hotel employees, satisfaction is 83% in St. Lucia and 87% in Grenada.
- ❖ **Employees at all-inclusive hotels experience more stress than at non-all-inclusive hotels:** 72% of employees at all-inclusive hotels in St. Lucia experience moderate to high stress, compared to 50% of employees at non-all-inclusive hotels
- ❖ **Employees at all-inclusive hotels work more night shifts than employees of non-all-inclusive hotels:** on average, all-inclusive employees work an additional 2.7 night shifts in St. Lucia and 2.6 in Grenada more than non-all-inclusive employees each week.
- ❖ **The most commonly mentioned labor obstacle hindering the growth of the establishment was difficulty finding skilled workers (68% of hotels in St. Lucia and 70% in Grenada).** This was the case for both women and men represented institutions, and all-inclusive and non all-inclusive establishments on both islands. For all-inclusive hotels, the difficulty of finding skilled workers and workers lacking experience is a greater obstacle than for non all-inclusive hotels (74% of all-inclusives, compared to 66% of non-all-inclusives mention difficulty finding skilled workers as a major labor obstacle).
- ❖ **Business environment obstacles vary by island, hotel model and gender of respondent, but electricity and inadequately educated workforce were consistently mentioned the most often** (57% in St. Lucia and 31% in Grenada mentioned electricity as an obstacle and 52% in St. Lucia and 53% in Grenada mentioned inadequately educated workforce). In St. Lucia, all-inclusive hotels saw access to finance as a significant obstacle, while non-all-inclusive hotels saw it more as a moderate obstacle (53% of all-inclusives mention access to finance as obstacle, whereas non-all-inclusives more commonly mentioned crime, theft and disorder (47%) and electricity (44%)).
- ❖ **Agribusinesses supplying to hotels do not have formal contract and suffer from lack of predictability in business.** 90% of agri-businesses in St. Lucia and 100% in Grenada supply to at least one all-inclusive hotel. Yet, on average, approximately 95% of these agri-businesses do not have formal contracts with any hotel (all-inclusive or non all-inclusive). Nevertheless, 93.4 % of the agribusinesses expect to continue supplying the hotels in the future.

Gender

- ❖ **Tourism sector has high level of female ownership and management, but gender disparities exist.** World Bank Enterprise Survey data shows that 24% of firms in St. Lucia and 24% of firms in Grenada have a female top manager, compared to 22% in Latin America and the Caribbean, and 19% in all countries. The current study shows that the tourism sector has a high level of female ownership and management (63% of hotels in St. Lucia and 78% in Grenada have women amongst the owners, and women's share in ownership in those establishments is 61% in St. Lucia and 67% in Grenada. 60% of hotels in St. Lucia and 70% in Grenada have a female top manager), but gender disparities exist.
- ❖ **Female employees are highly concentrated in traditionally female-dominated occupations:** Female employees are most heavily concentrated in housekeeping, food and beverage and front office (74% in St. Lucia and 82% in Grenada), while male employees are more likely to be found in facilities and maintenance and financing and accounting (50% in St. Lucia and 69% in Grenada).
- ❖ **While the tourism sector fares better than the national average, female employees are paid less than male employees:** Female employees are paid less than male employees working the same type of position, controlling for experience and other individual and hotel characteristics. Women's mean compensation is 23% lower than men's in Grenada and 10% lower in Saint Lucia. The largest wage gap can be seen at all-inclusive hotels in Grenada, in which women's mean compensation is 41% lower than men's. For comparison purposes, in the United States, in 2016, men earned 2.4% more than women on average, while doing the same job.
- ❖ **Female employees are more likely than male employees to not be compensated for working overtime:** 25% of female employees in St. Lucia and 40% in Grenada are not compensated at all for working overtime, compared to 16% of male employees in St. Lucia and 19% in Grenada.
- ❖ **Female employees are promoted less often than male employees:** In St. Lucia, the male promotion rate is 9% in all-inclusive hotels and 10% in non-all-inclusive hotels, while the female promotion rate is 5% in all-inclusive hotels and 6% in non-all-inclusive hotels.
- ❖ **Female employees in Grenada experience higher levels of stress than male employees:** 19% of women in Grenada experience high or severe stress at work, compared to 7% of men.
- ❖ **Female entrepreneurs are at higher risk of being asked for sexual favors than male entrepreneurs:** 32% of the respondents in St. Lucia and 19% in Grenada consider the risk of female entrepreneurs' being asked for sexual favors as high or very high. For male entrepreneurs, only 6% of respondents in St. Lucia and 3% in Grenada rate this risk as being high or very high.

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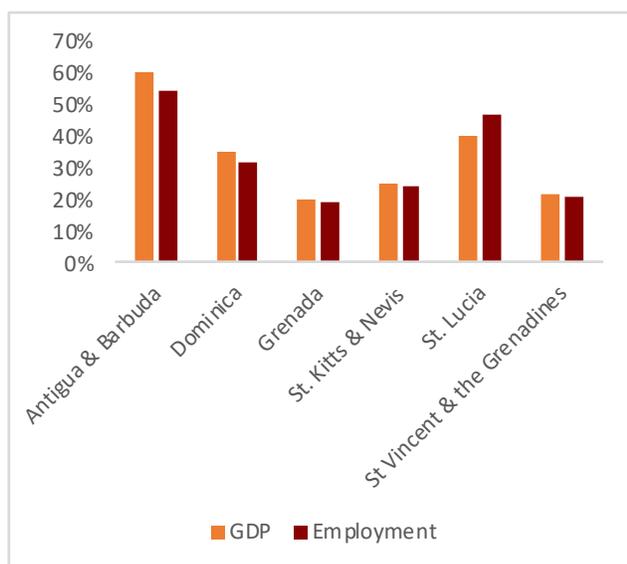
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EXECUTIVE SUMMARY

(a) Purpose and Limitations of the study

The tourism sector is a significant source of employment and economic growth in the Organisation of Eastern Caribbean States (OECS).

Table 1: Tourism economic contributions 2016 (%)



Source: UNWTO

Tourism has traditionally been dominated by female employment. Yet, globally, within the tourism sector, women are generally found in lower level occupations and receive lower pay than their male counterparts.

There is also debate over the increasing presence of all-inclusive resorts in the Caribbean. Proponents argue that they provide a substantial boost to employment and contribute more to GDP than smaller local establishments. Critics of the all-inclusive model, however, point to the high spending leakage rates to foreign owners often associated with large all-inclusive hotels and their potential for providing employment that is more seasonal and more vulnerable in nature.

This paper is a technical note, intended to inform the implementation of the OECS

Regional Tourism Competitiveness Project in areas related to tourism market development, by shedding light on the impact of different models of tourism development on the quality of jobs. As such, the key audience of this paper is the technical team engaged in implementing this work. It is important for those implementing tourism development policies in Grenada and St. Lucia to better understand the impact of the different models of tourism development on the quality of jobs for their population, given that enhancing the prospects for more inclusive growth—with accessible opportunities for sustainable employment, particularly for women and youth—is vital to raise living standards. Creating an environment that is conducive to the development of women within the tourism sector depends on a detailed understanding of the jobs provided by hotels and an understanding of how the quantity and quality of jobs provided differs by hotel model.

While the focus of the paper is to look at the different experiences of men and women in the two studied models of tourism, in some cases, there are differences between all-inclusives and non all-inclusives regardless of gender. When those issues have been detected in the results, they have been highlighted as well.

The paper can also inform other projects currently implemented by Grenada and St. Lucia that deal with micro small and medium enterprises (MSMEs) as well as female entrepreneurs, such as those that impact the competitiveness of the agriculture sector, or aim to strengthen access to finance. Technical teams engaged in implementing these projects are another key audience of this work.

At the same time, the data collected, as well as the analysis offered will strengthen the capacity and capability of the governments of Grenada and St. Lucia to understand

trends to meet policy objectives. As such, statistical agencies collecting data in tourism and agriculture are also another key audience for this work.

The methodology developed for this study could be used in other parts of the world to shed light on similar issues in those regions and, as such, tourism development specialists from around the world could also be considered important beneficiaries of this work.

This study only looks at two models, namely, all-inclusive and non-all-inclusive tourism models, and it does not quantify the economic impact of the different models on jobs. Rather, it is meant to look at the impact of these two models of tourism on the *quality* of jobs, especially for women, in Grenada and St. Lucia. Additional studies to better understand the economic contribution of the different models would be beneficial. In addition, expanding the research to other models of tourism (such as cruise) would also be useful.

This work also looks at whether the linkages between tourism and agriculture are different for all-inclusive versus non-all-inclusive hotels. The linkage with agriculture was selected specifically, given that, together with tourism, agriculture makes the most significant economic contribution in the OECS region. Better understanding some aspects of the impact of the different models of tourism development on the agriculture sector would help in forming better policies in these two key economic sectors.

The study is meant to provide a section-by-section statistical and factual representation of the responses received on each of the key questions in the survey, as a way to shed light on the general trends. Further analysis of the data, including understanding the underlying justifications that are driving some of the observed trends would be a very interesting exercise that would require additional research.

While the analysis provides further information on the impact of the two mentioned types of tourism development on

the quality of jobs, it is not intended to prescribe one model over the other. Policy recommendations on which model would best serve the local population would require further analysis, including, as stated, better understanding the economic impact of the different models of tourism development on jobs, which is an area not targeted by this study.

(b) Findings – Gender Perspective

The tourism sector presents unique opportunities for women's participation in the workforce, women's entrepreneurship, and women's leadership. Women represent a majority of the employees and managers in the hotel industry in St. Lucia and Grenada. Women make up approximately 58% of the workforce in St. Lucia and 61% in Grenada. 63% of hotels in St. Lucia and 78% in Grenada have women amongst the owners of the establishment.

Yet, women still face significant disadvantages compared to men. Female managers and entrepreneurs still face socio-cultural bias and are more susceptible to harassment in running their businesses. 32% of the respondents in St. Lucia and 19% in Grenada consider the risk of female entrepreneurs' being asked for sexual favors as high or very high. For male entrepreneurs, only 6% of respondents in St. Lucia and 3% in Grenada rate this risk as being high or very high.

Most respondents felt that men are more likely to run large businesses. This perception is confirmed by the survey results, which indicate that 60% of large hotels are run by a male top manager and the remaining 40% by a female top manager.

Only 45% of employers in St. Lucia and 53% in Grenada believe the government treats male-owned and female-owned businesses the same.

Findings from both the Employer and Employee survey suggest that, while tourism fares better than the national average, there is a gender compensation gap. Female employees are paid less than

male employees working the same type of position, controlling for experience and other individual and hotel characteristics. Women's mean compensation is 23% lower than men's in Grenada and 10% lower in Saint Lucia. The largest wage gap can be seen at all-inclusive hotels in Grenada, in which women's mean compensation is 41% lower than men's.

Despite being well represented in management (women make up 51% of managers in St. Lucia and 58% in Grenada), there is still occupational segregation of employees, with women more concentrated in traditionally female dominated occupations. Female employees are most heavily concentrated in housekeeping, food and beverage and front office (74% in St. Lucia and 82% in Grenada), while male employees are more likely to be found in facilities and maintenance and financing and accounting (50% in St. Lucia and 69% in Grenada).

Additionally, in St. Lucia, male employees are promoted at higher rates than female employees, while in Grenada, female employees' promotion opportunities depend on the hotel in which they are employed. In St. Lucia, the male promotion rate is 9% in all-inclusive hotels and 10% in non-all-inclusive hotels, while the female promotion rate is 5% in all-inclusive hotels and 6% in non-all-inclusive hotels. In Grenada, all-inclusive hotels promote males at a 17% rate and females at a 3% rate, while non-all-inclusive hotels promote males at a 3% rate and females at a 20% rate.

In this study, we found that only a small percentage of workers experience high levels of stress, but when there *is* stress, women experience it more significantly than men. 19% of women in Grenada experience high or severe stress at work, compared to 7% of men.

(c) Findings – Tourism sector models

Employees largely believe that tourism is a good sector to work in. There is a high level of satisfaction among employees. 95% of employees in both St. Lucia and Grenada report to being proud to work in the tourism industry and 80% of employees in St. Lucia and 71% in Grenada would like to pursue a career in the tourism industry. These perceptions are highly positive in both all-inclusive and non-all-inclusive hotels and among both male and female employees.

The majority of hotels in St. Lucia and Grenada are non-all-inclusive, with only 27% of hotels in St. Lucia and 28% in Grenada generating 10% or more of their sales from all-inclusive services. All-inclusive hotels are larger than non-all-inclusive hotels. The typical all-inclusive hotel has about 6.5 times more rooms in St. Lucia and about 6 times more rooms in Grenada, compared to the typical non-all-inclusive hotel.

Most hotels are open year-round regardless of their business model, however all-inclusive hotels have higher low season occupancy rate compared to non-all-inclusive ones in both St. Lucia and Grenada (46% all-inclusive vs 33% non-all-inclusive in St. Lucia and 50% all-inclusive vs 38% non-all-inclusive in Grenada).

All-inclusive hotels provide significantly more jobs (approximately 75% of the total jobs in the sector) than non-all-inclusive hotels. These hotels currently make up about one-fourth of the total number of hotels, but provide almost three-fourths of the jobs.

All-inclusive hotels provide higher compensation and more benefits (meals, transport, weekly time off, etc.) to their employees. This finding was reflected in both the Employer and Employee surveys. Employees of all-inclusive hotels receive, on average, 532.31 XCD more in St. Lucia and 894.95 XCD more per month in Grenada

than employees of non-all-inclusive hotels, holding all else constant².

Transportation is provided mostly by all-inclusive hotels and large hotels. 79% of hotels that provide transportation in St. Lucia and 58% of the hotels that provide transportation in Grenada and all-inclusive hotels.

In St. Lucia, employees at all-inclusive hotels perceive their paid leave policies as being more flexible than employees of non-all-inclusive hotels, but all-inclusive hotels require more advance notice. 88% of employees at all-inclusive hotels reported that in their hotel taking paid leave is very or somewhat flexible, compared to 75% of employees at non-all-inclusive hotels, but employees at all-inclusive hotels are required to give 3.4 weeks of advance notice, while employees at non-all-inclusive hotels must give 2.0 weeks, on average.

Employees of all-inclusive hotels are more likely to receive rewards in addition to regular compensation, but gender does not seem to play a role in allocating these rewards. 42% of all-inclusive employees in St. Lucia and 44% in Grenada receive these other rewards, compared to only 17% of non-all-inclusive employees in St. Lucia and 22% in Grenada.

All-inclusive hotels are more likely to offer training programs. In both St. Lucia and Grenada, employees of all-inclusive hotels were significantly more likely to report that their hotel offered training programs in 2016 than employees of non-all-inclusive hotels. 46% of all-inclusive hotels in St. Lucia and 68% in Grenada offered training in the previous year, compared to 15% of non-all-inclusive hotels in St. Lucia and 25% in Grenada.

Yet, employees of all-inclusive hotels expressed lower satisfaction than

employees of non-all-inclusive hotels. Employees of all-inclusive hotels expressed that they experience more stress (72% of employees at all-inclusive hotels in St. Lucia experience moderate to high stress, compared to 50% of employees at non-all-inclusive hotels) and working more night shifts (on average, all-inclusive employees work an additional 2.7 night shifts in St. Lucia and 2.6 in Grenada more to non-all-inclusive employees each week) than employees of non-all-inclusive hotels.

At all-inclusive hotels, women largely believe the government treats genders the same (75% in St. Lucia and 71% in Grenada). In comparison, in non-all-inclusive hotels, the portion of women who believe they are treated the same is much lower (32% in St. Lucia and 46% in Grenada) and is significantly lower than the portion of men who believe this.

Hotels that are fully-all-inclusive³, in comparison to those that provide both all-inclusive and non-all-inclusive services, are found to offer the highest compensation, but lower quality of jobs. Employees at these hotels are the least satisfied, particularly in Grenada (80% among fully all-inclusive compared to 83% among non-all-inclusive in St. Lucia and 75% among fully-all-inclusive compared to 87% among non-all-inclusive in Grenada) and the most likely to have observed threats, shouts, scolding, racial discrimination and gender discrimination (20% of fully-all-inclusive employees in St. Lucia and Grenada have observed racial discrimination, while only 15% of non-all-inclusive employees in St. Lucia and 7% in Grenada have observed the same).

All-inclusive hotels are also more likely to have foreign ownership. Foreign-owned hotels⁴ show a similar pattern of providing jobs with higher compensation and rewards, but with negative implications in terms of job

² Results come from a regression of compensation on individual and hotel characteristics. Independent variables included gender, hotel model, age, experience in the sector, education, and occupational category

³ Fully-all-inclusive hotels represent a small portion of the sample. Only 10% of employees in St. Lucia and 21% of employees in Grenada work at hotels that provide only all-inclusive services. Findings based on this sample size are not statistically scientific. However, important insights can be gained by the comparison.

⁴ Foreign ownership also represents a small part of the sample. 24% of employees in St. Lucia and 18% in Grenada are employed by hotels that are 100% foreign owned.

quality. Employees at foreign-owned hotels tend to work more (49 hours per week in foreign-owned versus 40 hours per week in domestic in Grenada), experience more stress (1.8 days per week in foreign versus 1.6 days per week in domestic in St. Lucia and 1.8 days per week in foreign and 1.5 days per week in domestic in Grenada) and are injured more often (8% of employees at foreign owned compared to 3% of domestic owned in St. Lucia and 35% of foreign owned compared to 17% of domestic owned in Grenada) than at domestic hotels.

This suggests a nuanced picture of the impact of all-inclusive hotels on the local economy. While they contribute more to employment and the economy and provide employment with higher compensation and benefits, the jobs they provide tend to be lower quality, as workers experience lower satisfaction, higher stress and higher levels of threats and discrimination.

(d) The Agri-Business Linkages

Based on the findings of this study, on average, approximately 95% of agri-businesses who are suppliers to the hospitality sector do not have formal contracts with any hotel (all-inclusive or non-all-inclusive). Nevertheless, 93.4 % of the agribusinesses expect to continue supplying the hotels in the future.

For establishments that supply to both all-inclusive and non-all-inclusive hotels, the larger portion of sales is generated through selling to all-inclusive hotels. In St. Lucia, 64% of sales are to all-inclusive hotels and in Grenada, 53% of sales are to all-inclusive for establishments that supply to both.

Agricultural establishments that supply to both all-inclusive and non-all-inclusive hotels are the most likely to sell products grown by other farmers. 33% of establishments in St. Lucia and 44% in Grenada process, package and sell/resell products that are not grown or harvested by the establishment

There seem to be no systematic differences in the treatment received from different types of hotels. Establishments report

similar types of contracts, modes of payments, timeliness of payments and overall satisfaction when dealing with all-inclusive and non-all-inclusive hotels.

(e) Policy Implications:

The hotel industry provides opportunities for women's participation in the workforce, women's entrepreneurship, and women's leadership. In both St. Lucia and Grenada, women are well represented at all levels of employment, including owners, managers, supervisors, operational staff, etc.

Despite high levels of representation, inequality persists. Findings suggest that women owners and managers face more risk in terms of harassment and that the government does not treat male and female-owned businesses the same, which constrains the ability of women to grow their businesses. Employers reported that agencies regulating SMEs prefer to deal with men due to cultural perceptions. Thus, policies and strategies implemented by these agencies should be made more gender aware and the norms and stereotypes that lead to the preference of men should be addressed within the agencies.

Training and business development to support women's entrepreneurship could also help women to scale up business operations. Most employers believe that, in the tourism sector, men are more likely to run large businesses than women. Currently there are few, if any, programs to support women's entrepreneurship. The majority of employers reported that the lack of specialized business education and training for women hindered their ability to run large businesses, but 95% of employers were in support of government policies to support gender equality in the tourism sector. Business development services targeted to supporting female entrepreneurship can help them to access finance and information to scale up their businesses and close the gender gap.

Additionally, the employer survey points to a need for gender mainstreaming in corporate policies of hotels. Employers indicate that

they see gender equality as an important objective, but most are not actively taking steps to achieve it. Female employees face a gender wage gap and have lower average promotion rates, despite positive perceptions of female employees' skills and job performance. Given the important role played by women throughout the sector, hotel policies should incorporate these issues to underscore gender equality in hiring, promotion, treatment and compensation of employees.

The employee survey provides evidence of occupational segregation and a gender compensation gap. Yet, women make up the majority of the workforce and both male and female employees largely believe there are no gender wage gaps. Achieving gender equality in the tourism sector will thus require policies that go beyond gender diversity to address the norms and information asymmetries that lead to gender-based disparities. Trainings for female employees should focus on supporting women's movement into jobs with fewer women and into positions of responsibility and leadership, on addressing information asymmetries that lead to women being unaware of gender pay gaps and on empowering women to be able to apply for different positions and ask for promotions and raises. These trainings should be planned with women's specific time constraints in mind (i.e. women often have more caretaking responsibilities at home than men). Additionally, hotels could offer specific options to help female employees balance work and home responsibilities, such as childcare options or specific guidelines for flexible work schedules.

(f) Areas of further research

While this technical note is a useful first step towards understanding the differences between the impact of all-inclusive and non all-inclusive tourism development models on the quality of jobs for women, other research areas could also be supported by the data collected. For example, from our data, it appears that there are some linkages between the size of the hotel and offering all-inclusive services. It would be interesting further what are the determinants for hotels to start offering all-inclusive services. In addition, why all-inclusive hotel employees are facing more stress and what could be done to alleviate it; what are driving the pay differences. Moreover, more detailed research could be done by employee types (front desk versus management), and their experiences. Or why do all-inclusive hotels experience more access to finance challenges in Saint Lucia as opposed to non-all-inclusive hotels. Also, are there interesting comparisons to be made between the tourism and hotel models/policies in St. Lucia and Grenada that could 1) shed light on some of the differences between respondents from the two countries, and 2) offer insights into what is behind employee and manager satisfaction? As for agribusinesses, it would be interesting to understand what the reasons are behind the fact that only 5% of businesses have formal contracts with hotels, and whether having formal contracts would bring any benefits for the agribusinesses. These are only a sample of a few areas of additional research, and other analysis could also be contemplated based on the data gathered.

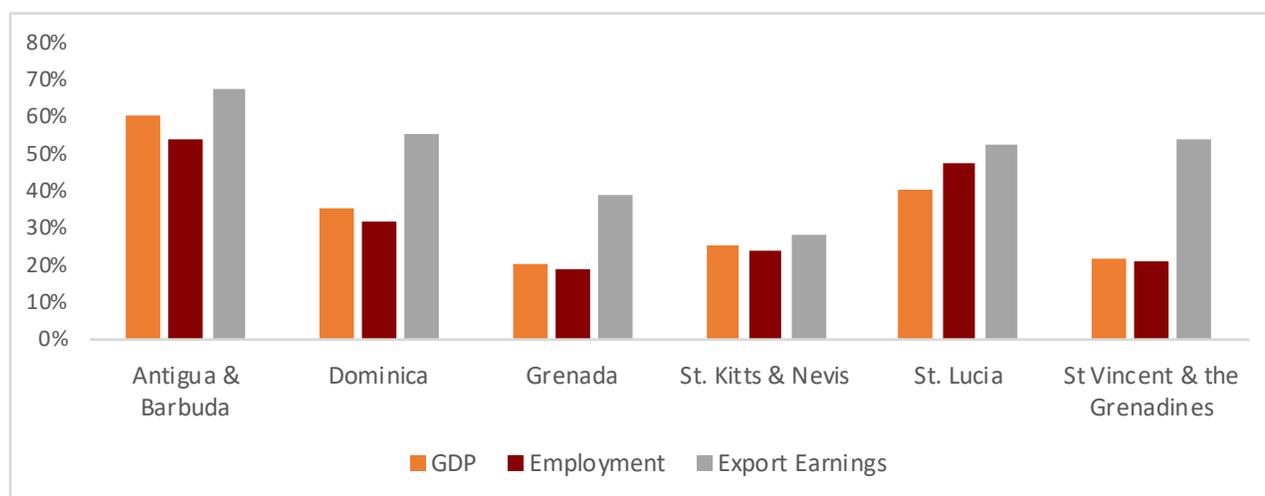
1. INTRODUCTION

The Tourism Industry in the OECS

The tourism industry plays a key role in the economies of the Organization of Eastern Caribbean States (OECS) countries. Tourism is one of the few industries in which Small Island Developing States in the Caribbean, such as St. Lucia and Grenada, have a competitive advantage and it has thus become a key part of the development strategies of these countries. In 2016, 25 million international travelers visited the Caribbean and spent 30 billion US Dollars⁵. Tourism is a significant contributor to GDP, employment and export earnings throughout the OECS. On average in the six independent OECS countries, tourism and its related activities (including food and beverage, recreation, etc.) contributed 34% to GDP, 33% to employment and 49% to export earnings in 2016⁶.

Tourism has traditionally represented a significant source of employment for women. Previous research has found evidences of occupational segregation and gender wage gaps⁷ (wage gaps were found also during the current study, see chapter 3). Men are more likely to hold management positions, whereas most women occupy positions like waiting and bar staff, kitchen hands, domestic staff and cleaners. Overall, women tend to be employed in less formal and more vulnerable positions. Women are also paid less than their male counterparts, even when doing the same work. For instance, the average gross pay for men working in accommodation and food services in St. Lucia is EC\$2265 per month, while for women it is EC\$1769⁸.

Figure 1.1: Contribution of Tourism to GDP and Employment in the OECS



UNWTO

⁵ UNWTO Tourism Highlights: 2016 Edition

⁶ World Travel and Tourism Council Annual Reports: The Economic Impact of Travel & Tourism 2017. Reports accessed for Antigua & Barbuda, Dominica, Grenada, St. Kitts & Nevis, St. Lucia and St. Vincent & the Grenadines

⁷ Biswas and Cassell 1996; Purcell 1996; Sparrow and Iverson 1999; Thrane 2007; Baum 2013

⁸ Saint Lucia Population and Housing Census, 2010

The All-Inclusive Debate

There is debate over the growing presence of all-inclusive resorts in the Caribbean. Proponents of the all-inclusive model argue that they are a significant boost to employment and related sectors that provide inputs, such as agriculture. Research has shown that all-inclusive hotels make a larger contribution to GDP⁹, provide more employment and contribute more to the local economy through taxation¹⁰ than non-all-inclusive hotels. However, the all-inclusive model is also associated with high leakage rates, as these resorts in the Caribbean tend to be foreign owned¹¹. Travelers who use the all-inclusive model pay for everything before leaving home, meaning little of the foreign currency reaches the local market. Additionally, having paid for all meals and activities ahead of time, guests are less inclined to venture outside of their hotel to spend money in local restaurants, shops or other local tourist attractions.

There is also debate over the opportunities for employment presented by all-inclusive hotels. All-inclusive hotels can provide a significant boost to employment by providing a high number of jobs requiring a variety of skill levels and backgrounds. Despite the large number of jobs generated, the literature suggests that non-all-inclusive hotels tend to offer higher quality employment than all-inclusive hotels. All-inclusive hotels tend to rely more on seasonal staff, which leads to seasonal unemployment, irregular and long working hours, and high employee turnover¹². As a result, employees at all-inclusive hotels are more vulnerable to exploitation and overwork¹³. Additionally, according to a study conducted by the Organization of American States (OAS) on Jamaica's tourism industry, non-all-inclusive hotels employ more people per dollar revenue than all-inclusive hotels¹⁴.

Considering these findings, sound policies for the development of the tourism sector need to be based on a thorough assessment of the state of employment in and challenges faced by all-inclusive and non-all-inclusive hotels. As a diagnostic tool, this report presents and discusses firm-level and individual-level data collected by the Tourism, Gender and Competitiveness Surveys in St. Lucia and Grenada. These types of survey data are a crucial complement to macroeconomic data. They make it possible to analyze firm-level practices, obstacles and potential—as well as their variation across different types of firms—to understand the specific challenges faced by both employees and employers in the tourism sector.

The Focus of this Report

The report is divided into four parts. The first chapter provides overview of the all-inclusive vs. non-all-inclusive debate in OECS and the scope and methodology of two nationally representative surveys of the tourism sector in St. Lucia and Grenada. The next three chapters focus on key issues for understanding the role of non-all-inclusive vs. all-inclusive tourism models in providing quality jobs for women and youth in the OECS. Each chapter examines findings from a different perspective, which together give a holistic picture of the key challenges to growing the tourism sector and its ability to offer high quality employment

Chapter 2 explores findings from the employers' perspective. This chapter highlights issues critical to running a business in the hotel sector. It explores the role of gender in determining key outcomes for hotel businesses. Additionally, it examines differentials in employment between different types of hotels.

⁹ Issa and Jayawardena 2003

¹⁰ Farmaki et al. 2017

¹¹ Farmaki et al. 2017

¹² Farmaki et al. 2017

¹³ Tavares and Kozak 2015

¹⁴ Issa and Jayawardena 2003

Chapter 3 examines findings from the employees' perspective, specifically issues related to hiring/ firing, compensation by gender, jobs opportunities and career growth as well as access to benefits and harassment on the job. The objective is to understand the situation and perspectives of male and female employees with regard to their work experience in the hospitality sector.

Chapter 4 explores the linkages between the tourism and agricultural sectors to understand how hotels interact with the local agricultural market. This chapter seeks to answer the question of whether the linkages between tourism and agriculture are different for all-inclusive versus non-all-inclusive hotels.

Annexes 1 and 2 present deeper dives into specific ownership characteristics and how these impact job quality. Annex 1 explores the role of foreign ownership in determining job characteristics and job quality for employees. Annex 2 explores additional insights gained by distinguishing between fully-all-inclusive and partially all-inclusive hotels.

Methodology

This report is an assessment of the employment provided by all-inclusive and non-all-inclusive hotels and the challenges faced by employees and employers in the tourism sector. The report presents the results of the Tourism, Gender and Competitiveness Surveys conducted in St. Lucia and Grenada 2017. The Tourism, Gender and Competitiveness Surveys provide data on a representative sample of the hotels in the two pilot countries. The survey was carried out via two modules (1) interviews with managers/owners

(entrepreneurs) of hotels (2) interviews with employees of hotels. This allows for a complete picture of the hotel industry from both the employee and employer perspective, and to understand whether employers and employees see issues eye-to-eye. As a secondary goal, to understand better the linkages between agriculture and tourism, interviews were carried out with managers/owners (entrepreneurs) of agribusinesses that supply to hotels.

The selection of a data-collection methodology was based on practicality and the necessity to fit within the Project's budget, limited timeline and realities of the countries. Given the budget and similarities in the targeted frames, the Enterprise Survey (ES) methodology, well tested and implemented globally, was identified as the most appropriate, considering valuable lessons learned during the engagement in Grenada between June and September 2011 as part of the Latin America and Caribbean (LAC) Enterprise Survey initiative of the World Bank.

The Enterprise Surveys, through interviews with firms in the manufacturing and services sectors, capture business perceptions on the biggest obstacles to enterprise growth, the relative importance of various constraints to increasing employment and productivity, and the effects of a country's business environment on its international competitiveness. The ES team has experience in implementing similar projects globally, and in the Caribbean. For the purposes of the present study, the Enterprise Survey modus operandi was expanded to include the surveying of firms that are smaller than 5 employees. This is to capture the reality for more female entrepreneurs who are often at a micro size.

Table 1: Summary of Hotels Interviewed

Hotel Model	St. Lucia		Grenada	
	All-inclusive	Non-all-inclusive	All-inclusive	Non-all-inclusive
SME	44%	98%	60%	100%
Large	56%	2%	40%	0%
Foreign	47%	18%	40%	15%
Domestic	53%	82%	60%	85%
Average number male employees	62.5	9.1	16.5	2.8
Average number female employees	74.1	8.8	29.5	4.5
% Female management	47%	56%	70%	50%
% Female ownership	33%	39%	44%	53%
Gender of Manager	Male	Female	Male	Female
SME	86%	82%	93%	85%
Large	14%	18%	7%	15%
% Female ownership	26%	47%	33%	65%
Average number male employees	20.2	26.8	3.1	9.45
Average number female employees	18.1	34.2	4.9	16.7

The study's sample size is very rich given the size of the sampling universe (the final sample captured more than 40% of the targeted firm universe on both islands). The study represents the largest (based on sample size) single sector (tourism specific) study that the Bank has ever implemented in the region, using the Enterprise Survey methodology.

Sampling frame. The study used as a baseline frame the most up-to-date hotel listing shared by Ministry of Tourism in Saint Lucia and Hotel Tourism Association in Grenada. Furthermore, the team looked for additional hotels using on-line sources and the final frames were deduplicated and tested using random calls and verification in place.

Margins of error and confidence intervals. The ES typically uses a 7.5% margin of error and 90% confidence interval

at stratum level as part of its methodology. However, these margins are based on samples targeting larger economies. For smaller economies (such as St. Lucia), the margin of error is adjusted accordingly, i.e. for example the latest survey in St. Lucia (2010) had a sample size that would correspond to about 8.93% margin of error, at sectoral level. To meet the ES standards for precision level and considering the total estimated population size of 218 hotels on both islands the recommended minimum sample size would have been 78 hotels. However, since desegregation of the results, at an island level, was desirable for comparison purposes the survey targeted to achieve maximum sample size possible given the small universe size resulting in a final sample of 98 hotels (62 in St. Lucia and 36 in Grenada). The final sample statistical properties are fully comparable with ES standards for small economies (In Grenada the margin of error is slightly larger

(CI 90% and margin of error of 10% due to unavailability of replacements). Overall, the survey is close to a census with about 42% of the hotels in St. Lucia and about 47.4% in Grenada being interviewed as part of the study.

Survey instrument. The methodology and the survey instruments were developed by the World Bank Group. The content of the survey instruments was prepared based on input received from stakeholders on some key issues that affect employees in all-inclusive and non-all-inclusive hotels in the region, and the gender-specific challenges that were highlighted by stakeholders during roundtable discussions to prepare the methodology. The questionnaires were piloted in both countries and calibrated based on inputs from government counter parts, as well as sample of employers and employees. The survey instruments were peer reviewed by gender, impact evaluation, tourism and survey experts within the World Bank Group. The survey was implemented using three complimentary questionnaire modules (“Manager”, “Employee” and “Agribusiness”) to capture the perspectives of different participants in the tourism sector and linked local agribusinesses.

The Hotel managers module. Managers module is designed to seek opinions and information from the establishment’s senior managers. It provides the management’s perspective regarding hotel’s policy on gender equality, gender diversity, promotions and benefits. Furthermore, the module highlights business environment obstacles faced by male and female entrepreneurs. Overall 98 managers were interviewed, one per establishment.

The Hotel Employees module. The module seeks to get the employees perspective on gender equality, gender diversity, promotions, benefits and harassment on the job.

Two randomly selected employees (one per gender from each hotel) were targeted for interview, whenever possible. Overall 192 employees were interviewed (79 males and 113 females). The higher share of female employees in sample is due to smaller hotels having only one employee.

Nevertheless, the gender perspectives are still comparable because the survey is a random draw from the survey universe that is proportional to the sampling frame.

Farmers’ module: The farmers module was included to look for potential differences in treatment and selection of local suppliers based on the tourism model. The farmers universe (the subset working with hotels) was enumerated by asking each hotel to present a list of agribusinesses they have worked with and the farmers sample was drawn from there. The survey results for the farmers are not representative of the entire aggri-sector as by design the sample excludes agribusinesses that are currently not supplying to hotels. Nevertheless, the module still adds value, as it sheds light on the perspective of farmers that already work with hotels.

Limitations of the methodology: Due to a small firm universe, some analysis could not be done. For example, regression analysis could not control for size, ownership (foreign versus domestic), or by nature of hotel (100% all-inclusive versus non- all-inclusive). In terms of linkages with the suppliers, the agribusinesses were only selected from a sub-universe of confirmed suppliers and therefore are indicative only for the sub-universe of the agribusinesses that have working relationships with hotels not the entire agribusiness sector.



2. FINDINGS FROM THE EMPLOYER SURVEY

Introduction

The employer survey was designed to capture the perspective of managers and owners of hotels to better understand the impact that different tourism models have on the agenda for jobs and shared prosperity, particularly the impact on women as both employees and self-employed businesses. This chapter explores the employer perspective on employees, gender equality in the tourism sector and the experience of female managers and entrepreneurs.

The nationally representative survey interviewed managers and owners from both all-inclusive and non-all-inclusive hotels throughout St. Lucia and Grenada to gain an understanding of whether and how these hotels differ in their interactions with the labor market, the government, etc.

This chapter also looks at how the gender of the manager/owner affects his or her experiences in running a hotel business. Previous research shows that compared to the Latin America and Caribbean (LAC) region and other regions, female management is high in St. Lucia and Grenada. World Bank Enterprise Survey data shows that 24% of firms in St. Lucia and 24% of firms in Grenada have a female top manager, compared to 22% in Latin America and the Caribbean (LAC) and 19% in all countries¹⁵. The current study shows that the tourism sector has a high level of female ownership and management, but gender disparities exist in the treatment of managers and owners by officials.

¹⁵ World Bank Enterprise Surveys St. Lucia and Grenada (2010)

Business Characteristics

The majority of hotels were classified as non-all-inclusive.

Only 27% of hotels in St. Lucia and 28% in Grenada were all-inclusive hotels. Many hotels in the OECS region provide both options, offering separate packages to different guests, with some taking the all-inclusive options and others paying per service. For the purposes of this study, a hotel is classified as all-inclusive if it offers the option of all-inclusive services, regardless of the share of all-inclusive services in overall business. For hotels offering both options, all-inclusive services contributed 32% to overall business, on average.

Women are well represented among ownership and management of hotels in St. Lucia and Grenada.

53% of respondents in St. Lucia and 56% of respondents in Grenada were women. These respondents were either owners, general managers or managers of the hotels in which they worked. Additionally, 63% of hotels in St. Lucia and 78% in Grenada have women amongst the owners of the establishment. Among those that have women in ownership, women's share in ownership is 61% in St. Lucia and 67% in Grenada. 60% of hotels in St. Lucia and 70% in Grenada have a female top manager.

Table 2.1: Profile of Respondents

	St. Lucia	Grenada
Hotel model		
All-inclusive	27%	28%
Non-all-inclusive	73%	72%
Gender		
Male	47%	44%
Female	53%	56%
Role at Establishment		
Owner	55%	39%
General manager	31%	19%
Manager	15%	42%

Figure 2.1: Women amongst owners by hotel model and gender of employer

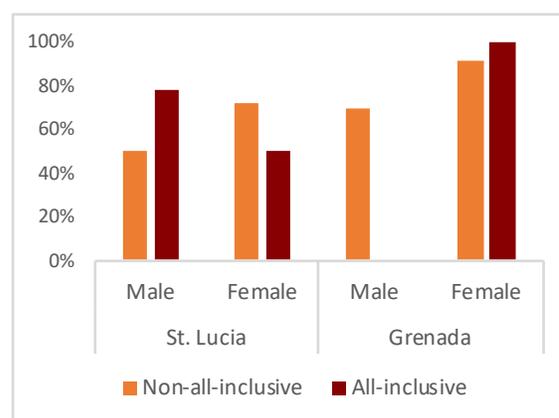
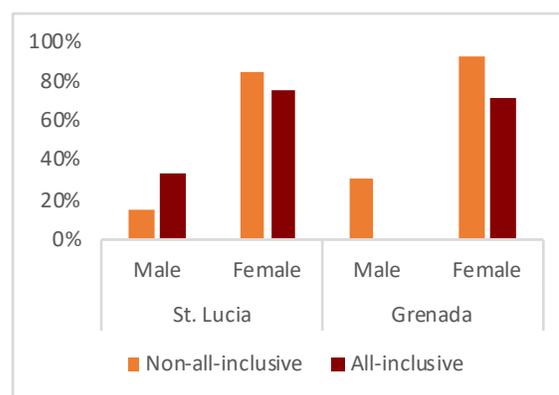


Figure 2.2: Hotels with female top manager by hotel model & gender of employer



All-inclusive hotels are larger than non-all-inclusive hotels.

All-inclusive hotels have a significantly higher number of rooms than non-all-inclusive hotels. The difference is statistically significant in both St. Lucia and Grenada. Additionally, in both St. Lucia and Grenada, all-inclusive hotels were significantly more likely to be a part of a larger firm than non-all-inclusive hotels. Among those that are a part of larger firms, all-inclusive hotels are a part of larger chains than non-all-inclusive hotels, on average.

On average, all-inclusive and non-all-inclusive hotels have been operating for similar lengths of time.

On average in St. Lucia, all-inclusive hotels have been operating for 16 years, while non-all-inclusive hotels have been operating for 18 years. In Grenada, all-inclusive hotels have been operating for 14 years on average, compared to 17 years for non-all-inclusive hotels.

The vast majority of establishments were formally registered.

In both St. Lucia and Grenada, 92% businesses surveyed are formally registered. Registration is high across all categories, but especially among all-inclusive hotels, where 100% of businesses are registered.

Most establishments are open year-round.

Only 2 establishments, both non-all-inclusive hotels in St. Lucia, reported to closing for some days during the low season.

Table 2.2: Size of hotels - number of rooms, membership in larger firm and size of larger firms by hotel model

	St. Lucia		Grenada	
	All-inclusive	Non-all-inclusive	All-inclusive	Non-all-inclusive
Avg. Number of rooms (per hotel)	75	13	70	17
Part of larger firm	47%	13%	30%	12%
Number hotels part of the larger firm	16	5	8	2

Figure 2.3: Years in operation by hotel model and gender of employer

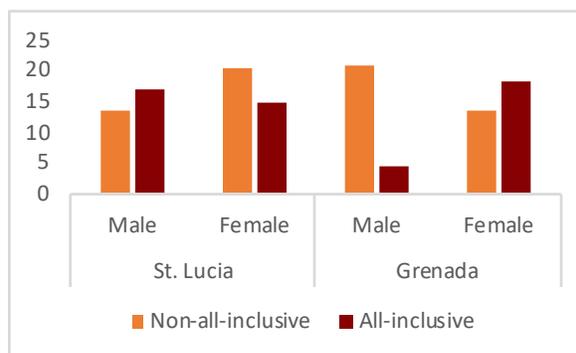
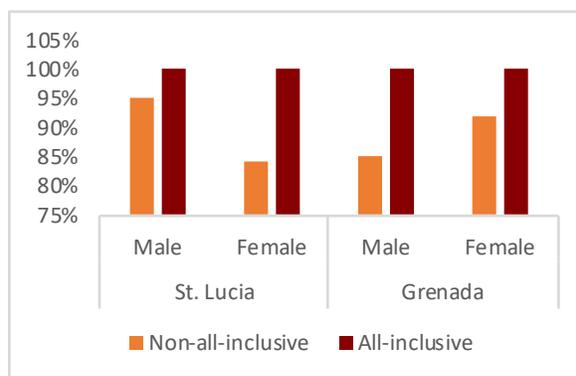


Figure 2.4: Formal registration by hotel model and gender of employer



Particularly in non-all-inclusive hotels, female owned and managed maintain higher occupancy rates than those owned and managed by men

In both high and low season, the average occupancy rate in hotels that are owned/managed by women is significantly higher than the occupancy rate of hotels owned/managed by men. This trend is particularly strong among non-all-inclusive hotels, in which female managed hotels have an occupancy rate 8%-13% higher than their male counterparts across islands and across high season versus low season. During high season, occupancy rates are similar for all and non-all-inclusive hotels, but all-inclusive hotels maintain higher occupancy rates in low season.

Table 2.3: Average occupancy rate in high and low season by hotel model and gender of employer

Average occupancy - high season				
	St. Lucia		Grenada	
	Non-all-inclusive	All-inclusive	Non-all-inclusive	All-inclusive
Male	67.7%	76.8%	80.0%	90.0%
Female	80.8%	76.3%	88.1%	84.3%
Average occupancy - low season				
	St. Lucia		Grenada	
	Non-all-inclusive	All-inclusive	Non-all-inclusive	All-inclusive
Male	27.4%	45.0%	35.8%	52.5%
Female	39.4%	46.3%	47.8%	57.1%

Business Obstacles

The most commonly mentioned labor obstacle hindering the growth of the establishment was difficulty finding skilled workers.

This was the case for both women- and men-represented institutions and all-inclusive and non all-inclusive establishments on both islands. Other common labor obstacles included workers' lack of experience, workers' lack of reliability, and difficulty in finding workers, in general. Respondents on both islands also indicated that minimum wage was not a major obstacle, nor was payroll taxes. For all-inclusive hotels, the difficulty of finding skilled workers and workers lacking experience is a greater obstacle than for non-all-inclusive hotels.

Table 2.4: Labor obstacle hinder business growth by hotel model and gender of employer

	St. Lucia				Grenada			
	Non-all-inclusive		All-inclusive		Non-all-inclusive		All-inclusive	
	Male	Female	Male	Female	Male	Female	Male	Female
Difficult to find skilled workers	55%	76%	67%	75%	62%	69%	100%	71%
Workers lack experience	40%	60%	67%	50%	54%	54%	67%	43%
Difficult to find workers	50%	48%	33%	75%	23%	38%	0%	57%
Workers are not reliable	20%	36%	11%	38%	46%	31%	67%	43%
Payroll taxes	20%	16%	22%	25%	0%	15%	33%	0%
High worker turnover	10%	16%	0%	0%	31%	15%	67%	0%
Cost of wages	5%	12%	22%	13%	23%	8%	0%	14%
Minimum wage	0%	8%	11%	0%	15%	0%	0%	14%

The most pressing business environment obstacles are electricity and inadequately educated workforce.

Business environment obstacles vary by island, hotel model and gender of respondent, but electricity and inadequately educated workforce were consistently mentioned the most often (57% in St. Lucia and 31% in Grenada mentioned electricity as an obstacle and 52% in St. Lucia and 53% in Grenada mentioned inadequately educated workforce). In St. Lucia, all-inclusive hotels saw access to finance as a significant obstacle, while non-all-inclusive hotels saw it more as a moderate obstacle. Also in St. Lucia, crime, theft, and disorder was a common concern, while in Grenada it is not (45% in St. Lucia, compared to 17% in Grenada).

Table 2.5: Business environment obstacles by hotel model and gender of employer

	St. Lucia				Grenada			
	Non-all-inclusive		All-inclusive		Non-all-inclusive		All-inclusive	
	Male	Female	Male	Female	Male	Female	Male	Female
Top obstacle	Electricity	Crime, theft & disorder	Access to finance	Crime, theft & disorder	Inadequately educated workforce	Electricity	Inadequately educated workforce	Inadequately educated workforce
Second obstacle	Crime, theft & disorder	Electricity	Inadequately educated workforce	Electricity	Electricity	Political Instability	Electricity	Electricity
Third obstacle	Inadequately educated workforce	Practices of competitors in informal sector	Electricity	Access to finance	Corruption	Inadequately educated workforce	Access to land	Corruption

Pay, Benefits and Promotion

Female employees are paid less than male employees who hold the same position.

This difference in pay is most substantial in high-level positions, such as manager and department head. This high-level gender wage gap is larger in Grenada, where male managers make more than twice as much as female managers on average. The wage gap persists regardless of whether the hotel is owned/managed by a man or woman in the survey.

Employees of all-inclusive hotels are paid more than employees of non-all-inclusive hotels in the same position.

With a few exceptions, in both St. Lucia and Grenada, across all occupational categories, employees at all-inclusive hotels have higher wages than their counterparts at non-all-inclusive hotels.

All-inclusive hotels offer more benefits than non-all-inclusive hotels.

Options for flexible work is the most common benefits to be provided. Other common benefits are free or subsidized meals and free or subsidized transport. Free and subsidized meals and transport are most likely to be offered by all-inclusive hotels, rather than non-all-inclusive. This trend is particularly strong in St. Lucia, where 94% of all-inclusive hotels offer free or subsidized meals and 94% offer free or subsidized transport, compared to 31% and 24% of non-all-inclusive hotels, respectively. In Grenada, across all categories of benefits, a larger percentage of all-inclusive hotels offer each type of benefit compared to non-all-inclusive hotels.

Temporary employees receive the same types of benefits, but to a significantly lesser extent

In both St. Lucia and Grenada, free or subsidized meals and transport, followed by flexible work options are the most common benefits. About half of the hotels that offer these benefits to permanent employees also offer them to temporary employees.

Table 2.6: Average wage of male and female employees by position

	St. Lucia				Grenada			
	Non-all-inclusive		All-inclusive		Non-all-inclusive		All-inclusive	
	Male employees	Female employees	Male employees	Female employees	Male employees	Female employees	Male employees	Female employees
Managers	3845	3575	5901	5218	6275	2886	5438	3785
Department Heads	2175	1871	3186	2933	2250	1664	2425	2250
Occupation workers	2000	2000	4000	3115	3000	2033	-	-
Technical workers	1645	1333	3860	3860	1188	1017	2533	1800
Front-line operational	1317	1124	1584	1584	1547	1144	1340	1227

In St. Lucia, male employees are promoted at higher rates than female employees, while in Grenada, female employees' promotion opportunities depend on the hotel in which they are employed.

Table 2.7: Promotion rate of male and female employees by hotel model

	St. Lucia		Grenada	
	Non-all-inclusive	All-inclusive	Non-all-inclusive	All-inclusive
Male promotion rate	10%	9%	3%	17%
Female promotion rate	6%	5%	20%	3%

In both all-inclusive and non-all-inclusive hotels, the promotion rate¹⁶ is statistically significantly higher for male employees than for female employees. In Grenada, however, the promotion rate is different for all-inclusive and non-all-inclusive hotels. In all-inclusive hotels in Grenada, male employees have a higher rate of promotion while in non-all-inclusive hotels, female employees are promoted at a significantly higher rate than male employees.

¹⁶ The promotion rate is calculated as the number of promotions divided by the total number of employees. In the disaggregated calculations, the rate is the number of males or females promoted divided by the number of male or female employees, respectively.

Table 2.8: Benefits offered by hotel model reported by employers

	St. Lucia		Grenada	
	Non-all-inclusive	All-inclusive	Non-all-inclusive	All-inclusive
Free or subsidized meals	31%	94%	30%	60%
Free or subsidized transport	24%	94%	23%	60%
Free or subsidized housing	9%	18%	8%	20%
Free or subsidized childcare	2%	0%	4%	10%
Unsubsidized childcare	11%	0%	4%	10%
Options for flexible working hours	53%	59%	57%	60%
Support programs	4%	12%	4%	10%

Box 1: Manager vs. Employee View of Benefits

Employees largely reported receiving the same benefits that managers reported. Where the few divergences exist, they are mainly in managers reporting higher levels of benefits than employees. For example, 18% of all-inclusive hotel managers in St. Lucia report to offering free or subsidized housing, while only 2% of employees in this hotel reported that free or subsidized housing is offered.

Employee reporting of benefits by hotel model

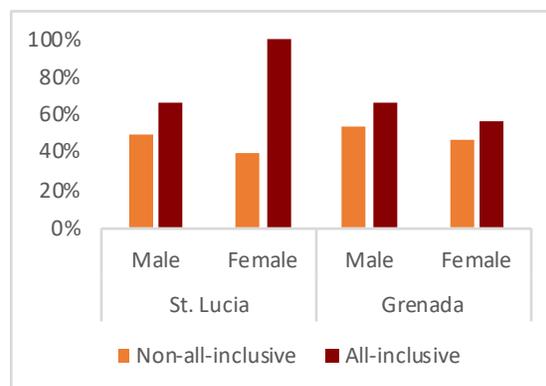
	St. Lucia		Grenada	
	Non-all-inclusive	All-inclusive	Non-all-inclusive	All-inclusive
Free/subsidized meals	46%	92%	35%	79%
Free/ subsidized transport	25%	84%	27%	65%
Free/subsidized housing	6%	2%	10%	9%
Free/subsidized childcare	0%	2%	0%	15%
Unsubsidized childcare	8%	2%	2%	6%
Options for flexible work	54%	56%	43%	68%
Support programs	6%	2%	5%	15%

Corporate Policy on Promoting Gender Equality

The majority of respondents see gender diversity as a strategic objective and few see any obstacles to implementing it.

Majority (over 55%) of male and female managers rate the importance of gender diversity as high or very high. 53% of hotels in St. Lucia and 28% in Grenada have taken measures to recruit, retain or develop women, but there is no significant difference within the countries between hotels managed by women versus men or by all-inclusive versus non-all-inclusive hotels. Only 2 hotels, both in Grenada, see any obstacles to implementing gender diversity.

Figure 2.5: Gender diversity is a strategic objective



The majority of hotels hire female workers because of socially responsible employment practices or female workers' positive attributes.

The most common reasons for hiring female workers were that female workers are more reliable, the company is committed to socially responsible employment practices, and that there is an absence of suitably skilled male workers. Hiring female workers because they are less expensive or have less expectations of promotion is much less common, but still a reason for hiring female workers in approximately one-fifth of hotels. Most (approximately 70%) of the hotels that report these reasons are non-all-inclusive hotels.

Hotel has taken measures to recruit, retain or develop by hotel model and gender of employer

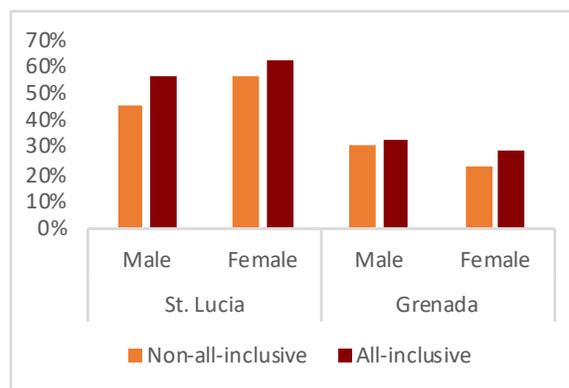


Table 2.9: Reason for Hiring Female Workers

	Grenada				St. Lucia			
	Non-all-inclusive		All-inclusive		Non-all-inclusive		All-inclusive	
	Male	Female	Male	Female	Male	Female	Male	Female
Company is committed to socially responsible employment practices	46%	46%	100%	14%	75%	60%	89%	63%
Female workers are more reliable	77%	23%	67%	14%	75%	48%	22%	50%
Absence of male workers with suitable skills	54%	38%	67%	71%	60%	48%	11%	63%
Female workers are less expensive	15%	8%	33%	0%	25%	12%	0%	0%
Women have less expectations of promotion	8%	15%	0%	0%	30%	16%	0%	0%
Company does not have specific policy	31%	31%	33%	57%	40%	36%	44%	25%

Employers of both all-inclusive and non-all-inclusive hotels have generally positive perceptions of the role of female labor in the tourism sector.

The majority of employers (80%) agreed that women greatly improve the talent pool from which we can recruit and that female workers are frequently better qualified than male workers available in the local community. The vast majority (93%) believe tourism provides great employment opportunities for women. Most agree that the use of female labor is likely to increase over the next 10 years, but this does not seem to be a result of political pressure or specific company strategies.

In both St. Lucia and Grenada, and regardless of business model (all-inclusive or non all inclusive) over 90% of hotel managers believe the use of women labor is likely to increase over the next 10 years.¹⁷

¹⁷ Table 2.7 presents a more disaggregated view of this issue

In Grenada, employers at all-inclusive hotels have more positive perceptions of the role of female labor than employers at non-all-inclusive hotels.

Respondents at all-inclusive hotels were significantly more likely to agree that the presence of female workers improves the quality of the workforce and that women improve the talent pool from which they can recruit and less likely to say that women create problems in the workplace. These hotels also expressed more positive attitudes regarding employment opportunities for women in the sector. They were more likely to agree that the use of women labor in the tourism sector will increase over the next 10 years and that the tourism sector provides great employment opportunities for women.

Table 2.10: Percent of respondents agreeing with statements regarding the future role of female workers by hotel model

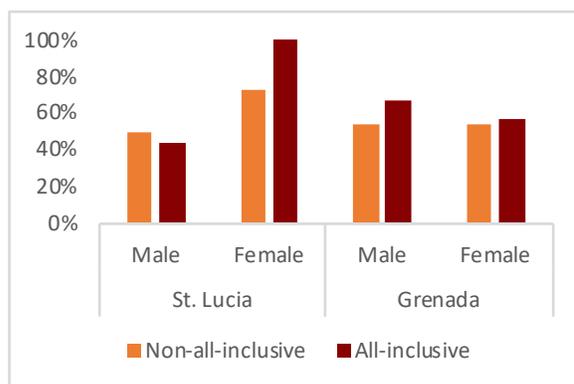
	St. Lucia		Grenada	
	All-inclusive	Non-all-inclusive	All-inclusive	Non-all-inclusive
The use of women labor in the tourism sector is likely to increase over the next 10 years	88%	93%	100%	92%
There is political pressure to increase the employment of women in the tourism sector	12%	24%	30%	12%
The presence of female workers improves the quality of our overall workforce	88%	76%	90%	77%
The company has a strategy to increase the number of female workers	6%	29%	10%	31%
Women greatly improve the talent pool from which we can recruit	59%	71%	100%	69%
Female workers are frequently better qualified than male workers available in the local community	65%	73%	70%	69%
The tourism sector provides great employment opportunities for women	94%	91%	100%	92%
Hotel companies need to plan their employment strategies for the future in the light of changing demographic structures within host communities	71%	71%	70%	69%
Our customers prefer female workers	6%	40%	10%	42%
Female workers create problems in the workplace	18%	31%	20%	31%

The Experience of Female Managers and Entrepreneurs

Female respondents have a more positive perception of women's understanding of laws and regulations.

The majority of respondents believe that female entrepreneurs have a clear understanding of current laws and regulations to operating their business (65% in St. Lucia and 56% in Grenada). However, male respondents are more likely to perceive that female entrepreneurs do not have a clear understanding of current laws and regulations than female respondents, particularly in St. Lucia.

Figure 2.6: Believe female entrepreneurs have a clear understanding of laws and regulations by hotel model and gender of employer



The most commonly cited obstacle for women-owned businesses is that authorities do not understand the challenges faced by female entrepreneurs.

This obstacle was reported by at least a third of respondents from every category except non-all-inclusive businesses in Grenada. Women’s low economic and social status was also frequently mentioned as a major obstacle. Limited access to legal and business development consultations for female entrepreneurs was mentioned mainly in St. Lucia stated as another key barrier. Employers at all-inclusive and non-all-inclusive hotels and men and women largely had similar responses in terms of obstacles for female entrepreneurs.

Table 2.11: Obstacles for female owned businesses by hotel model and gender of employer

	St. Lucia				Grenada			
	Non-all-inclusive		All-inclusive		Non-all-inclusive		All-inclusive	
	Male	Female	Male	Female	Male	Female	Male	Female
Authorities don't have enough information about challenges faced by female entrepreneurs	40%	40%	33%	50%	0%	8%	33%	33%
Limited access to legal and business development consultations for female entrepreneurs	25%	32%	33%	38%	0%	15%	0%	14%
Women's low economic and social status	40%	28%	22%	25%	15%	8%	33%	0%
Other	15%	4%	11%	13%	8%	8%	0%	0%

Most respondents felt that men are more likely to run large businesses.

Across St. Lucia and Grenada in both all-inclusive and non-all-inclusive hotels and among male and female respondents, there was general agreement that men are more likely to run large businesses in the tourism industry (77% in St. Lucia and 86% in Grenada). The most commonly cited reason for this is that agencies regulating Small and Medium Size Enterprise (SMEs) prefer to deal with men because of cultural perceptions, followed by the lack of specialized business education/training for women.

Figure 2.7: Believe men are more likely to run large businesses by hotel model and gender of employer

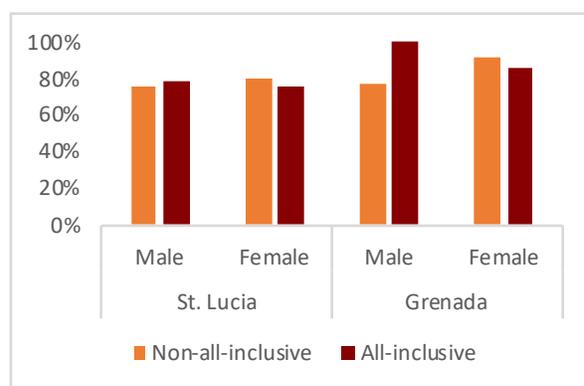


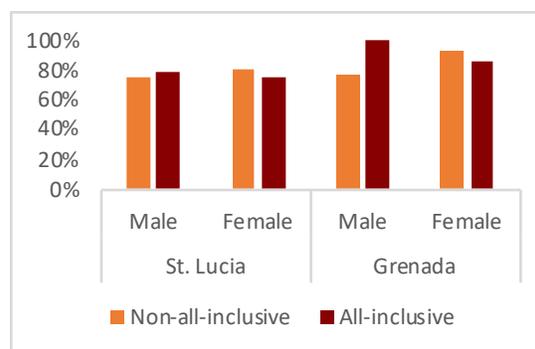
Figure 2.8: Reasons men are more likely to run large businesses by hotel model



There is an indication that men and women receive different treatment by the government depending on the hotel model.

Only 45% of employers in St. Lucia and 53% in Grenada believe the government treats male-owned and female-owned businesses the same. At all-inclusive hotels, women largely believe the government treats genders the same (75% in St. Lucia and 71% in Grenada). In comparison, in non-all-inclusive hotels, the portion of women who believe they are treated the same is much lower (32% in St. Lucia and 46% in Grenada) and is significantly lower than the portion of men who believe this.

Figure 2.9: Believe the government treats male and female owned business the same by hotel model and gender of employer



While few respondents were aware of any government programs to support women entrepreneurs, most would support such programs.

Only 6% in St. Lucia and 14% in Grenada have heard of any types of programs to support female entrepreneurship in the tourism sector. Only 2 respondents, one in St. Lucia and one in Grenada have participated in these types of programs. The consensus among those that have heard of programs of this type is that they are largely not successful (33% in St. Lucia and 0% in Grenada reported that the program was successful). Yet, the vast majority of respondents report that they would support government policies to support gender equality in the tourism industry.

Female entrepreneurs are more susceptible to harassment than male entrepreneurs.

12% of respondents in St. Lucia and 17% in Grenada were aware of cases where female entrepreneurs were subjected to forms of harassment besides being asked for informal payments by officials, in order to continue operating their businesses. In comparison, only 2% of respondents in St. Lucia and 8% in Grenada were aware of cases where male entrepreneurs were subjected to harassment. Additionally, 32% of respondents in St. Lucia and 20% of respondents in Grenada ranked the risk of female entrepreneurs being asked for sexual favors by officials in return for help with their business as high or very high, while only 6% in St. Lucia and 3% in Grenada ranked the risk for male entrepreneurs as high or very high. Table 2.10 below shows a more disaggregated view of this issue.

Table 2.12: Harassment of male and female business owners

	St. Lucia		Grenada	
	Non-all-inclusive	All-inclusive	Non-all-inclusive	All-inclusive
Aware of cases of female harassment	11%	12%	12%	30%
Aware of cases of male harassment	2%	0%	12%	0%
Female entrepreneurs' risk of being asked for sexual favors (high or very high)	31%	35%	16%	30%
Male entrepreneurs' risk of being asked for sexual favors (high or very high)	6%	6%	4%	0%

Details About This Establishment

Permanent employees have longer employment duration under female managers, while temporary employees have longer employment duration under male managers.

In both St. Lucia and Grenada, the average length of employment of permanent employees in all-inclusive and non-all-inclusive hotels is higher under female managers, with the exception of non-all-inclusive female employees. In contrast, the average length of employment of temporary employees is longer under male managers than female managers.

Table 2.13: Average length of employment of employees by hotel model and gender of employer

St. Lucia								
	Non-all-inclusive				All-inclusive			
	Permanent (years)		Temporary (months_		Permanent (years)		Temporary (months)	
	Male employees	Female employees	Male employees	Female employees	Male employees	Female employees	Male employees	Female employees
Male	4.5	8.1	3.3	3.3	7.0	7.0	4.8	4.8
Female	7.8	8.2	2.8	4.4	7.7	8.2	2.0	2.0
Grenada								
Male	7.0	8.0	3.0	4.1	3.0	3.0	4.0	4.0
Female	8.0	8.0	1.4	2.8	6.7	6.1	5.7	5.7

Most employees are from OECS countries.

99% of female employees and 97% of male employees were from the OECS.

Women make up approximately 58% of the workforce in St. Lucia and 61% in Grenada.

The proportion of female workers is higher in non-all-inclusive hotels than in all-inclusive hotels, in both St. Lucia and Grenada. In St. Lucia, female owned and managed hotels employ a higher proportion of female workers, but in Grenada, it is male owned and managed hotels that have the higher female to male worker ratio.

All-inclusive hotels are a significant source of employment in St. Lucia and Grenada.

All-inclusive hotels represent only 27% of the hotels in St. Lucia and 28% of the hotels in Grenada, but provide 76% of the employment in St. Lucia and 71% of the employment in Grenada. Both in terms of means and total numbers, employment provided by all-inclusive hotels is significantly larger than that provided by non-all-inclusive hotels.

Non-all-inclusive hotels have a higher management to staff ratio

The difference is statistically significant in St. Lucia, where management makes up 39% of the staff at non-all-inclusive hotels and 22% at all-inclusive hotels. In Grenada, management makes up 24% of the total staff at all-inclusive hotels and 26% at non-all-inclusive hotels.

Table 2.14: Proportion of female employees by hotel model and gender of manager

	St. Lucia		Grenada	
	Non-all-inclusive	All-inclusive	Non-all-inclusive	All-inclusive
Proportion of female employees	60%	51%	67%	56%
	Male Manager	Female Manager	Male Manager	Female Manager
Proportion of female employees	54%	61%	67%	63%

Table 2.15: Average number of male and female employees by hotel model

	St. Lucia		Grenada	
	Non-all-inclusive	All-inclusive	Non-all-inclusive	All-inclusive
Male employees	9.1	62.5	2.8	16.5
Female employees	8.8	74.1	4.5	29.5

Table 2.16: Management to staff ratio by hotel model

	St. Lucia		Grenada	
	Non-all-inclusive	All-inclusive	Non-all-inclusive	All-inclusive
Management-to-total staff ratio	39%	22%	26%	24%

The majority of employees have a high school-level education or lower.

Compared to all-inclusive hotels, non-all-inclusive hotels have a higher proportion of employees, both male and female, with university or vocational education.

Table 2.17: Educational attainment levels of employees by hotel model

		University		Vocational		High school		Less than high school	
		Non-all-inclusive	All-inclusive	Non-all-inclusive	All-inclusive	Non-all-inclusive	All-inclusive	Non-all-inclusive	All-inclusive
St. Lucia	Male employees	16%	5%	10%	10%	32%	32%	41%	53%
	Female employees	11%	7%	18%	13%	45%	33%	26%	47%
Grenada	Male employees	8%	5%	13%	10%	16%	40%	63%	44%
	Female employees	5%	5%	17%	11%	53%	25%	24%	59%

All-inclusive hotels have higher assets, operating costs and sales than non-all-inclusive hotels.

In terms of both the net book value and the cost to purchase, the value of machinery, vehicles & equipment and land & building is higher at all-inclusive hotels than non-all-inclusive hotels. The difference is statistically significant in St. Lucia, but not Grenada. Additionally, all-inclusive businesses on both islands had much higher operating costs and sales than non-all-inclusive businesses.

Figure 2.10: Operating Costs and Sales



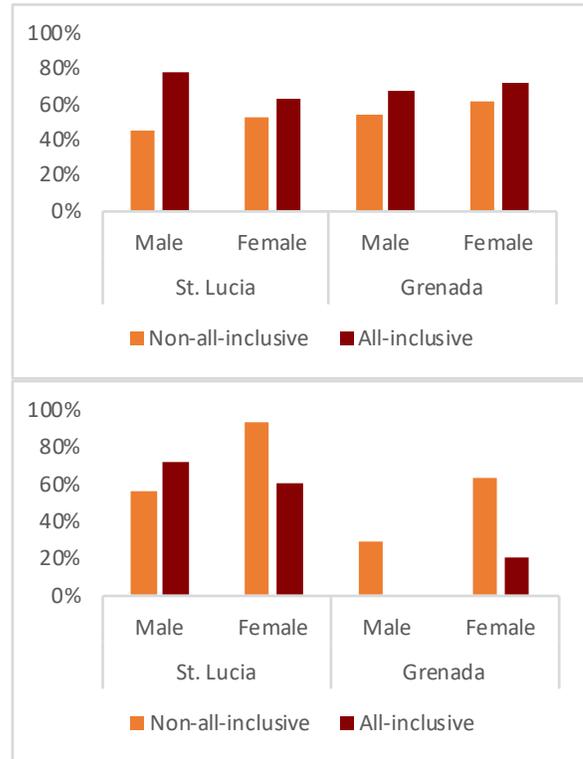
Figure 2.18: Financial information - Value of Assets (lhs) and Operating Costs & Sales (rhs)

		Non-all-inclusive		All-inclusive	
		Machinery, vehicles & equipment	Land & building	Machinery, vehicles & equipment	Land & building
St. Lucia	Net book value:				
	Male	116,667	7,830,769	2,350,000	16,466,667
	Female	20,000	3,584,572	30,400,067	26,188,650
Grenada	Male	2,526,875	21,757,857	150,000	5,000,000
	Female	1,730,946	46,51,545	28,400,000	-
St. Lucia	Cost to purchase:				
	Male	73,375	7,923,077	8,070,000	18,933,333
	Female	43,000	9,082,001	101,200,201	2,350,000
Grenada	Male	2,823,000	25,850,000	120,000	3,000,000
	Female	1,591,557	5,613,103	28,400,000	-

All-inclusive hotels are more likely to be planning to expand than non-all-inclusive hotels.

55% of in St. Lucia and 61% in Grenada are planning to expand business operations in the coming years. In both St. Lucia and Grenada, the proportion of hotels that are planning to expand is statistically significantly higher among all-inclusive hotels than non-all-inclusive hotels. In St. Lucia, the majority (74%) of those that are planning to expand are planning to fund the expansion with external financing. In comparison, only 37% of those in Grenada plan to use external financing.

Figure 2.11: Planning to expand (top) and planning to use external financing (bottom) by hotel model and gender of employer





3. FINDINGS FROM THE EMPLOYEE SURVEY

Introduction

The purpose of the employee survey was to calibrate the findings of the employers' survey, while better understanding the tourism sector from the perspective of the employees. In particular, the survey aimed to understand how different tourism models impact the experience employees have in the tourism sector. The survey also aimed to understand whether women and youth face different job experiences.

The information collected from employees is meant to complement the knowledge gained through the employer survey to gain a better understanding of key issues, such as payments, benefits, promotions, etc., from both ends. This survey was rolled out in parallel with the employer survey, interviewing both male and female employees from the hotels that also participated in the employer study.

This chapter dives into the various facets that play a role in determining how an employee experiences his or her job. This

includes working conditions, salary and benefits, skills and career development, job security and satisfaction. Findings indicate job satisfaction in the tourism sector is high, but that there are differences in the experience of employees at all-inclusive and non-all-inclusive hotels. Specifically, employees of all-inclusive hotels receive higher compensation than their counterparts at non-all-inclusive hotels but also have lower overall job satisfaction (this is only statistically significant in St. Lucia) and experience more stress on the job.

This chapter also presents evidence of a gender-based disparities among employees. Despite the fact that both men and women generally agree that there are no wage gaps between male and female employees, female employees are paid less than their male counterparts in both all-inclusive and non-all-inclusive hotels. There is also occupational segregation, with female employees highly concentrated in positions according to traditional gender roles.

Respondent Profile

The gender breakdown is more heavily weighted toward women.

In St. Lucia, respondents interviewed were 38% male and 62% female. In Grenada, respondents were 45% male and 55% female. While the original sampling strategy was designed to interview one male and one female respondent at each location, many of the smaller establishments did not employ both one male and one female employee. In the case that the hotel employed female employees, but no male employees, two female employees were interviewed. The result is that female respondents outnumber male respondents.

15% of the sample is classified as youth.

The United Nations (UN), for statistical consistency across regions, defines 'youth', as those persons between the ages of 15 and 24 years¹⁸. By this definition, 16% of employees in St. Lucia and 14% in Grenada are considered to be youth.

The majority of employees have a high school education or less.

59% of employees in St. Lucia and 48% of employees in Grenada have a high school diploma or less.

The vast majority of employees are from the country in which they currently work.

In St. Lucia, 99% of respondents were St. Lucian and 1% were Grenadian. In Grenada, 97% were Grenadian, 1% were St. Lucian, 1% Guyanese and 1% British.

Table 3.1: Respondent Profile

	St. Lucia	Grenada
Hotel model		
All-inclusive	51%	64%
Non-all-inclusive	49%	36%
Gender		
Male	38%	45%
Female	62%	55%
Age		
18-24 years	16%	14%
25-30 years	14%	26%
31-40 years	32%	27%
41-50 years	20%	20%
Over 50 years	17%	14%
Education		
Less than high school	19%	21%
High school	40%	27%
Vocational/technical	14%	18%
Some college, no degree	7%	9%
Associate degree	13%	24%
Bachelor's degree	5%	
Master's degree	0%	1%
Nationality		
St. Lucian	99%	1%
Grenadian	1%	97%
Guyanese		1%
British		1%

¹⁸ United Nations "Definition of Youth" Factsheet: <http://www.un.org/esa/socdev/documents/youth/fact-sheets/youth-definition.pdf>

Work Experience

Most employees have been in the tourism sector for many years.

The average employee has been working in the tourism sector for 11 years in St. Lucia and for 9 years in Grenada and has been at his/her current job for 6 years in both St. Lucia and Grenada. Fewer than one-fifth of employees (13% in St. Lucia and 11% in Grenada) are currently working their first job. Among those employees that this is not their first job, 41% of employees in St. Lucia and 36% of employees in Grenada had their first job in the hospitality sector.

On average, employees of non-all-inclusive hotels have more experience working in the tourism sector.

In terms of both years of experience in the sector and years of experience at the current hotel, employees at non-all-inclusive hotels have more years of experience than employees of all-inclusive hotels. The only exception is for female employees in St. Lucia, among whom experience in the sector is greater for employees of all-inclusive hotels. The differences between average years of experience of non-all-inclusive versus all-inclusive, however, are not statistically significant. Differences between male and female experience are also not statistically significant.

The vast majority of employees agree that gender equality is an important priority in the tourism sector.

89% of employees in St. Lucia and 97% of employees in Grenada believe that gender equality is an important priority in the workplace in the tourism sector. This is a common perception across men and women in all-inclusive and non-all-inclusive hotels.

Figure 3.1: Years of experience in sector

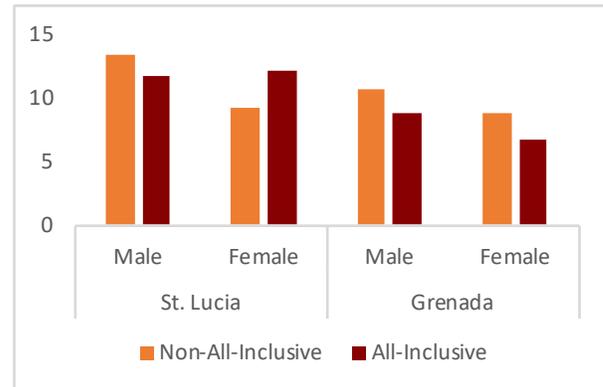


Figure 3.2: Years of experience at current job

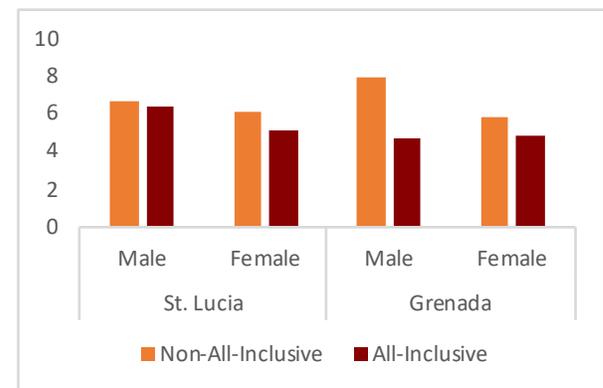
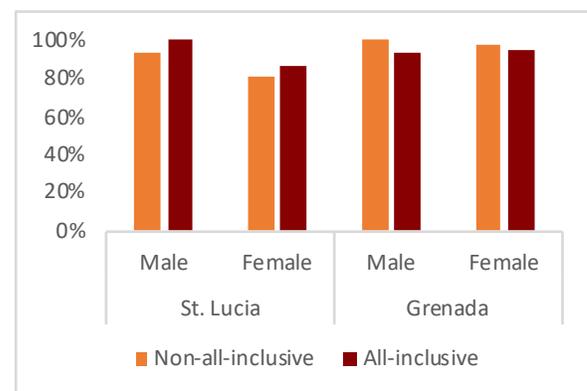


Figure 3.3: Perception of gender equality



Current Job Profile

Hotel employees are highly concentrated along traditional gender roles.

According to traditional gender norms, women’s work is in the area of caregiving, i.e. cleaning, cooking, and clerical duties, while men’s work is associated with strength. The job profiles of workers in hotels in St. Lucia and Grenada reflect these norms. Female employees are most heavily concentrated in housekeeping (31% in St. Lucia and 37% in Grenada), food and beverage (23% in St. Lucia and 17% in Grenada) and front office (20% in St. Lucia and 28% in Grenada). In contrast, male employees can largely be found in facilities and maintenance (30% in St. Lucia and 69% in Grenada) and finance and accounting in St. Lucia (19%). Table 3.2 below gives a more disaggregated view of this data.

Particularly in non-all-inclusive hotels, female employees are largely found in front-line operational staff. In St. Lucia 56% and in Grenada 53% of female employees in non-all-inclusive hotels can be found in the front-line operational staff category. In all-inclusive hotels, the comparable numbers are 34% in St. Lucia and 44% in Grenada.

Table 3.2: Department of employment by hotel model and gender of employee

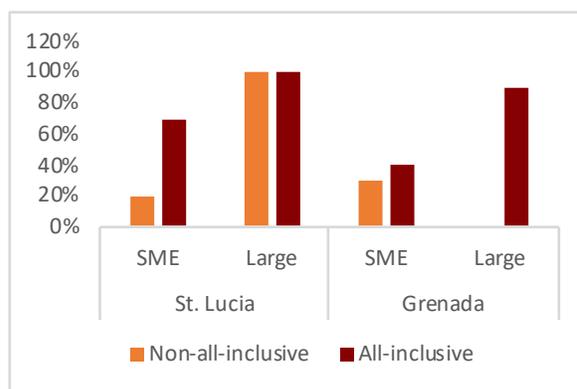
	St. Lucia				Grenada			
	Non-all- inclusive		All-inclusive		Non-all- inclusive		All-inclusive	
	Male	Female	Male	Female	Male	Female	Male	Female
Finance and accounting	6%	0%	29%	14%	0%	0%	6%	17%
Front office	6%	19%	14%	21%	8%	29%	0%	22%
Housekeeping	6%	44%	10%	17%	4%	38%	13%	33%
Food & beverage	13%	16%	29%	31%	0%	18%	25%	17%
Facilities & maintenance	50%	0%	14%	0%	81%	3%	50%	6%

Working Conditions

Transportation is provided mostly by all-inclusive hotels and large hotels.

43% of employees in St. Lucia and 54% of employees in Grenada have transportation for getting to and from work provided by their hotel. These employees largely work at all-inclusive hotels and large hotels. In both St. Lucia and Grenada, the provision of transportation is significantly higher for employees of all-inclusive hotels than non-all-inclusive hotels and for large hotels than for SMEs. Regardless of hotel model or size, among those that have transportation provided the majority are satisfied with the transportation provided. In St. Lucia, 89% are satisfied and in Grenada, 78% are satisfied.

Figure 3.4: Transportation provided by hotel model and size



Men work more night shifts than women and employees of all-inclusive hotels work more night shifts than employees of non-all-inclusive hotels.

The average employee in St. Lucia works 4.1 night shifts and in Grenada 4.5 night shifts.¹⁹ In both St. Lucia and Grenada, the average night shifts worked by men is greater than the average worked by women. This difference is statistically significant in St. Lucia, but not Grenada. In both St. Lucia and Grenada, employees of all-inclusive hotels work significantly more night shifts than those of non-all-inclusive hotels. Additionally, in Grenada, youth work a significantly higher number of night shifts than non-youth.

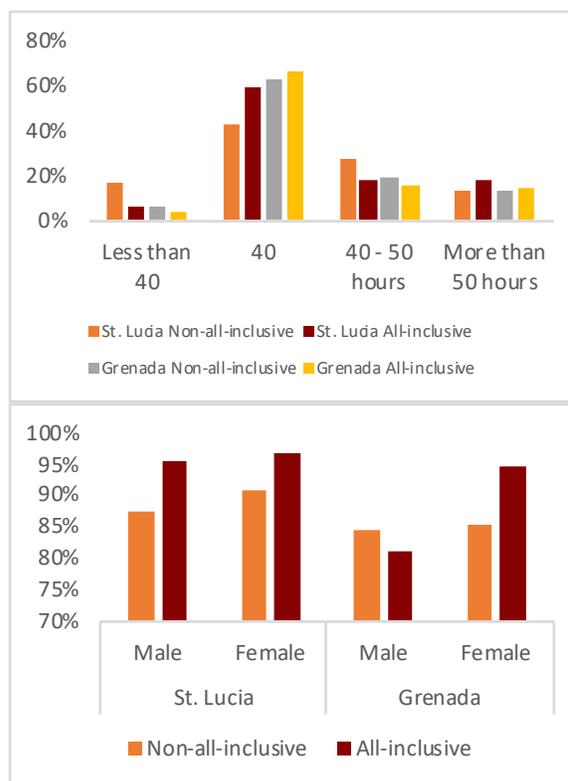
The majority of employees work between 40-50 hours each week and are satisfied with their working schedule.

In St. Lucia, 49% work 40 hours and 23% work 40-50 hours. In Grenada, 64% work 40 hours and 18% work 40-50 hours. The average hotel employee in St. Lucia works 40 hours and in Grenada 42 hours. The average number of hours worked per week does not vary significantly between male and female employees at all-inclusive and non-all-inclusive hotels. Overall, 86% of workers in St. Lucia and 93% of workers in Grenada are satisfied with their working schedules. Employees of all-inclusive hotels have slightly higher levels of satisfaction, but the difference is not statistically significant.

Table 3.3: Number night shifts by hotel model

	St. Lucia		Grenada	
	All-Inclusive	Non-all-inclusive	All-Inclusive	Non-all-inclusive
Male	7.5	5.2	7.5	3.5
Female	3.7	1.5	5.1	3.5
Youth	5.6	6.8	16.3	9.5
Non-youth	5.4	2.2	4.9	2.8

Figure 3.5: Working hours by hotel model (top) and satisfaction with working schedules by hotel model and gender of employee (bottom)



¹⁹ Table 3.3 presents a more disaggregated view of the data

In Grenada, women experience significantly higher levels of stress than men.

Most employees experience no or low to moderate stress at work (90% in St. Lucia and 86% in Grenada). In St. Lucia, the average number of days an employee is stressed at work is 1.7 and in Grenada is 1.5. In Grenada, women experience significantly higher levels of stress compared to men. 19% of women in Grenada experience high or severe stress at work, compared to 7% of men. Additionally, women experience stress 1.8 days per week, compared to 1.2 days per week for men. Both of these differences are statistically significant.

In St. Lucia, employees of all-inclusive hotels experience more stress than employees of non-all-inclusive hotels.

72% of employees at all-inclusive hotels in St. Lucia experience moderate to high stress, compared to 50% of employees at non-all-inclusive hotels. In terms of the number of days employees experience stress at work, employees at all-inclusive hotels also report a significantly higher number (2.7 days for all-inclusive versus 2.3 days for non-all-inclusive).

Employees at all-inclusive and non-all-inclusive hotels have similar experiences with different forms of harassment and discrimination.

The most common experience is shouting or scolding. In St. Lucia, 35% of employees have observed and 24% have experienced and in Grenada 40% have observed and 27% have experienced shouting or scolding. Table 3.5 below shows a more disaggregated view of this issue. In St. Lucia, employees at all-inclusive hotels are significantly more likely to have observed this phenomenon than employees at non-all-inclusive hotels. Other than this difference, employees of all-inclusive and non-all-inclusive hotels have observed and experience harassment and discrimination at largely the same rate.

The majority of hotel employees have not been injured physically at work. Only 4% in St. Lucia and 20% in Grenada have been injured. In Grenada, male employees have been injured significantly more than women (33% vs. 10%).

Figure 3.6: Level of stress (top) and average days employee feels stress at work (bottom) by hotel model and gender of employee

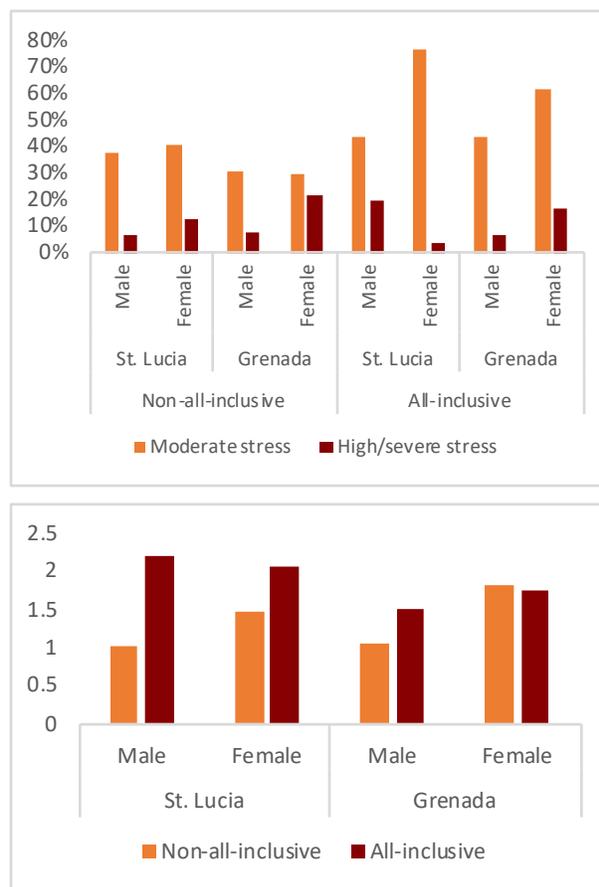


Table 3.4: Harassment and discrimination by hotel model and gender of employee

		St. Lucia				Grenada			
		Non-all-inclusive		All-inclusive		Non-all-inclusive		All-inclusive	
		Male	Female	Male	Female	Male	Female	Male	Female
Threats	Observed	13%	13%	29%	3%	15%	12%	31%	17%
	Experienced	6%	6%	24%	3%	0%	0%	31%	17%
Shouting/ scolding	Observed	25%	19%	71%	48%	42%	29%	44%	28%
	Experienced	25%	13%	38%	34%	27%	26%	25%	17%
Pushing/ shoving	Observed	6%	3%	10%	0%	12%	0%	13%	6%
	Experienced	6%	0%	14%	3%	8%	0%	13%	0%
Racial discrimination	Observed	6%	0%	24%	7%	15%	18%	25%	6%
	Experienced	6%	0%	5%	7%	8%	15%	19%	6%
Gender discrimination	Observed	6%	0%	24%	0%	4%	6%	6%	0%
	Experienced	6%	0%	10%	3%	8%	0%	6%	0%
Sexual harassment	Observed	13%	3%	5%	0%	4%	9%	6%	11%
	Experienced	6%	0%	5%	7%	8%	0%	13%	11%

Box 2: Male vs Female Reporting of Sexual Harassment

Survey results show that male employees more commonly reported observing sexual harassment than female employees, despite the fact that women more commonly experience sexual harassment in the tourism industry. The fact that male employees had higher rates of reporting sexual harassment may stem from cultural norms that discourage women from sharing such incidences. Women often fear they will face disbelief, inaction, blame or societal and professional retaliation. Research also shows that women are reluctant to label offensive experiences as sexual harassment, which leads to them underreporting actual experiences of harassment.¹

¹ Ilies, et. al. (2003); Blumethal (1998); Gutek (1995); Pryor (1995)

Salary and Benefits

Compensation includes wage paid by the hotel and any additional rewards.

The wage paid by the hotel makes up the largest portion of the overall compensation for most employees. On average, 76% of compensation in Grenada and 81% in St. Lucia comes from wage. The remainder is composed of service charges (14% in Grenada and 10% in St. Lucia), tips (2.5% in Grenada and 3.6% in St. Lucia), gratuity (5% in Grenada and 0.7% in St. Lucia) and commission (0.5% in Grenada and 3.5% in St. Lucia).

Women are more likely to not be compensated for working overtime than men.

Most employees do not work overtime often. The majority reported to working overtime moderately or slightly often (60% in St. Lucia and 50% in Grenada) or rarely (32% in St. Lucia and 43% in Grenada). Payments are the most common method of being compensated for overtime work. 48% of employees in St. Lucia and 43% in Grenada are compensated via payments and compensation via payments and another 5% in St. Lucia and 12% in Grenada are compensated via a combination of payments and benefits. Female employees have higher levels of non-compensation for overtime work than male employees. This difference is statistically significant in Grenada.

In St. Lucia, employees at all-inclusive hotels perceive their paid leave policies as being more flexible than employees of non-all-inclusive hotels, but all-inclusive hotels require more advance notice.

In St. Lucia, 88% of employees at all-inclusive hotels reported that in their hotel taking paid leave is very or somewhat flexible, compared to 75% of employees at non-all-inclusive hotels. Despite the fact that taking paid leave is reported to be more flexible, employees at all-inclusive hotels are required to give significantly more advanced notice than employees at non-all-inclusive hotels (3.4 weeks for all-inclusive vs 2.0 weeks for non-all-inclusive). There is no statistically significant difference in Grenada in terms of flexibility of paid leave or number of weeks of advanced notice required.

Figure 3.7: No compensation for overtime work by hotel model and gender of employee

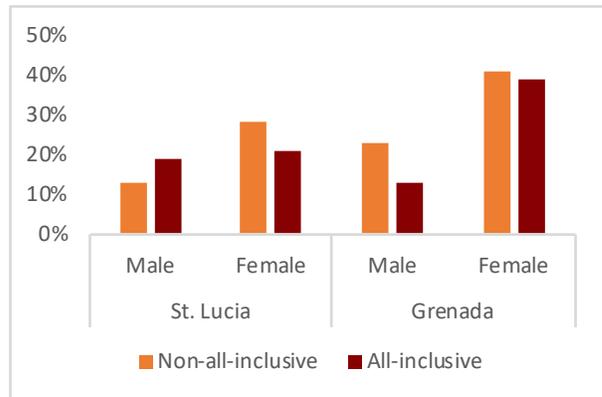


Table 3.5: Flexibility to take paid leave by hotel model

	St. Lucia		Grenada	
	All-Inclusive	Non-all-inclusive	All-Inclusive	Non-all-inclusive
Flexibility of taking paid leave (% very or somewhat flexible)	88%	75%	68%	67%
Number weeks advanced notice	3.4	2.0	2.1	1.8

Employees of all-inclusive hotels receive higher compensation than employees of non-all-inclusive hotels.

In both Saint Lucia and Grenada, the difference between the mean compensation of employees at all-inclusive hotels and employees at non-all-inclusive hotels is positive and statistically significant. When controlling for experience in the sector the pay gap remains. The difference in compensation between employees at all-inclusive hotels and non-all-inclusive hotels is significant in Grenada for all quartiles of years of experience. In Saint Lucia, the pay gap is statistically significant for workers with 9 or more years of experience in the tourism sector. Employees receive a pay dividend of approximately 532.31 XCD in St. Lucia and 894.95 XCD in Grenada for working at an all-inclusive hotel, holding all else constant (Table A3.1).

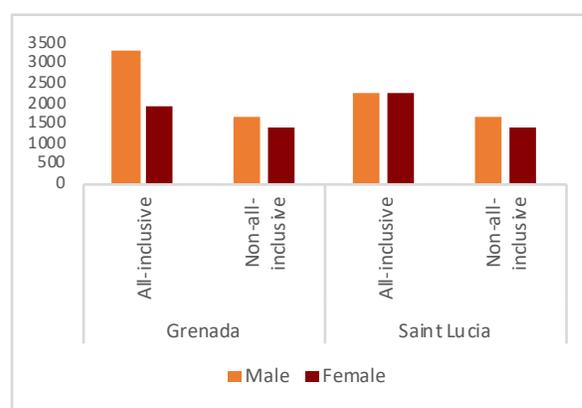
There is evidence of a gender pay gap, particularly in Grenada.

In both Saint Lucia and Grenada, the mean overall compensation is lower for women than men. Women’s mean compensation is 23% lower than men’s in Grenada and 10% lower in Saint Lucia. Pay gaps in the tourism sector are smaller than the overall wage gap across sectors, estimated at 29% in Grenada and 17% in St Lucia²⁰. This difference is statistically significant in Grenada, but not in Saint Lucia. The largest wage gap can be seen at all-inclusive hotels in Grenada, in which women’s mean compensation is 41% lower than men’s. Holding other observable factors constant²¹, this compensation gap remains in Grenada. Being female leads to an estimated 716 XCD decrease in compensation in Grenada (Table A3.1).

Table 3.6: Overall compensation (XCD) by hotel model and years of experience

Experience in tourism sector	Saint Lucia		Grenada	
	All-inclusive	Non-all-inclusive	All-inclusive	Non-all-inclusive
Less than 3 years	1035	994	1661	1451
3-8 years	2070	1464	1891	1735
9-15 years	5068	1928	2401	1333
More than 15 years	3194	2002	2734	1438

Figure 3.8: Overall compensation by hotel model and gender of employee



Despite this finding, an overwhelming majority of both men and women believe there are no wage gaps between men and women. Only 8.5% of hotel employees in Grenada and 6% of employees in Saint Lucia believe that wage gaps exist at their hotel.

²⁰ Source: World Bank staff estimates based on 2013-2016 Labor Force Surveys, forthcoming Systematic Regional Diagnostic for the OECS

²¹ Controls include: hotel model, age, experience in the sector, education, and occupational category

Women are less satisfied with their overall compensation than men.

In both St. Lucia and Grenada, women's satisfaction with their overall compensation is lower than men's satisfaction. This difference is statistically significant in St. Lucia (Table A3.2). Despite the fact that employees at non-all-inclusive hotels have lower overall compensation than employees at all-inclusive hotels, these employees do not express lower satisfaction with compensation. In fact, in St. Lucia, employees of all-inclusive hotels are less likely to be satisfied with their compensation than employees of non-all-inclusive hotels (Table A3.2).

The vast majority of respondents have not asked for an increase in compensation.

Only 27% of employees in St. Lucia and 17% of employees in Grenada had asked for an increase in compensation in the previous 2 years. In St. Lucia, employees of all-inclusive hotels asked for increases in compensation significantly more often than employees of non-all-inclusive hotels. 38% of employees who asked for an increase in compensation in St. Lucia and 50% in Grenada received the increased they requested. There are no significant differences in terms of employees receiving the requested compensation increase.

In St. Lucia, employees at non-all-inclusive hotels have more positive perceptions of the pay policy at their hotel than all-inclusive.

Employees of non-all-inclusive hotels in St. Lucia are significantly more likely to agree that their wage matches their performance and that the pay policy of the hotel helps attract and retain employees. In Grenada, employees at all-inclusive and non-all-inclusive hotels have similar perceptions of the pay policy at their hotel. Overall, 45% of employees in St. Lucia and 46% of employees in Grenada agree that the pay offered is competitive as compared to previous jobs. 50% of employees in St. Lucia and 53% of employees in Grenada agree that their wage matches their performance and 40% of employees in St. Lucia and 52% in Grenada agree that the pay policy of the hotel helps to attract and retain quality employees.

Figure 3.9: Satisfaction with compensation by hotel model and gender of employee

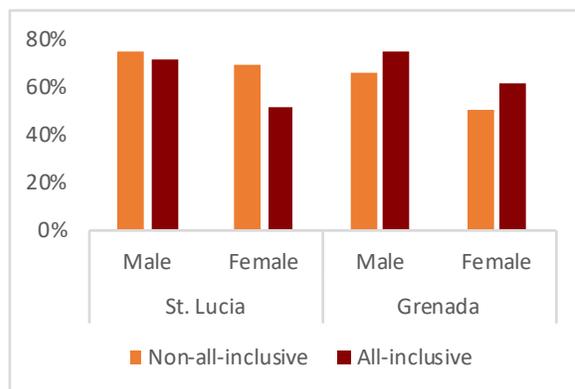


Figure 3.10: Asked for increase in compensation by hotel model and gender of employee

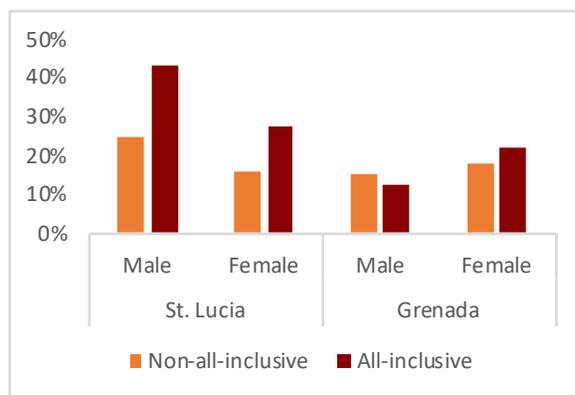
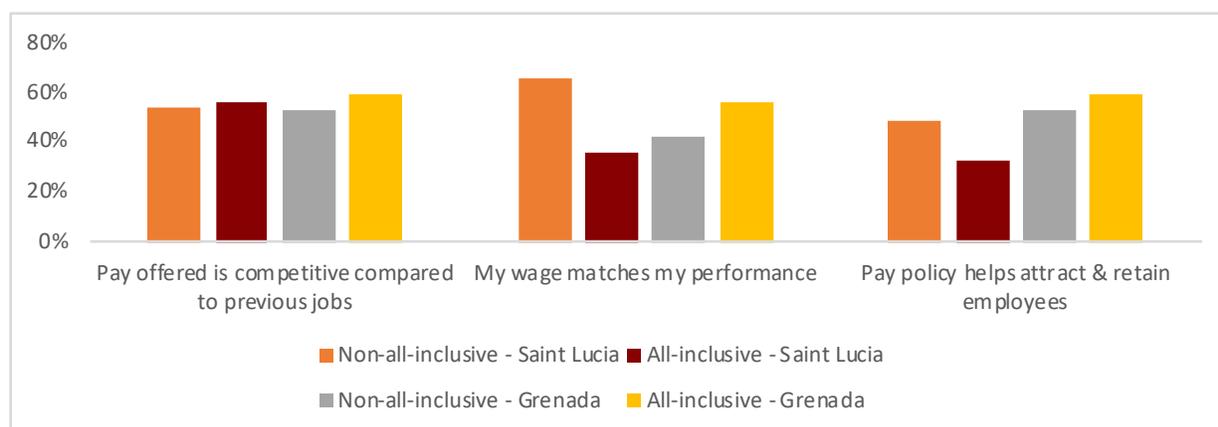


Figure 3.11: Perception of pay policy by hotel model



Employees of all-inclusive hotels generally receive more benefits than employees of non—all-inclusive hotels, most commonly free or subsidized meals and weekly time off

The most common benefits offered are weekly time off (offered to 64% of employees in St Lucia and 81% of employees in Grenada) and free or subsidized meals (69% of employees in St. Lucia and 51% of employees in Grenada). Table 3.7 below shows a more disaggregated view of the issue. When comparing benefits received by employees of all-inclusive hotels and employees of non-all-inclusive hotels, in both St. Lucia and Grenada, the results indicate that employees of all-inclusive hotels receive benefits more commonly than employees of non-all-inclusive hotels. The difference is statistically significant for free/subsidized meals, free/subsidized transport, weekly time off and options for flexible work.

Overall satisfaction with benefits is low.

40% of employees in St. Lucia and 41% in Grenada are satisfied with their benefits. 35% in St. Lucia and 36% in Grenada believe the benefits offered by their hotel are comprehensive. 26% in St. Lucia and 34% in Grenada believe the benefits are better than other places they have worked and 38% in St. Lucia and 30% in Grenada believe benefits provide security for their family. These patterns are similar to all-inclusive and non-all-inclusive employees.

Table 3.7: Benefits offered by hotel model

	St. Lucia		Grenada	
	Non-all-inclusive	All-inclusive	Non-all-inclusive	All-inclusive
Free/subsidized housing	6%	2%	10%	9%
Free/subsidized meals	46%	92%	35%	79%
Free/subsidized transport	25%	84%	27%	65%
Free/subsidized childcare	0%	2%	0%	15%
Unsubsidized childcare	8%	2%	2%	6%
Weekly time off	73%	88%	55%	79%
Options for flexible work	54%	56%	43%	68%
Support programs/facilities to reconcile work & family life	6%	2%	5%	15%

Employees of all-inclusive hotels are more likely to receive rewards in addition to regular compensation, but gender does not seem to play a role in allocating these rewards.

30% of employees in both Saint Lucia and Grenada receive some other type of reward, in addition to their wage and benefits. Table 3.8 shows this data disaggregated by hotel model. The most commonly mentioned of these was a reward for employee of the month/quarter and a reward for an employee's birthday. In both St. Lucia and Grenada, employees of all-inclusive hotels are significantly more likely to report receiving additional rewards than employees of non-all-inclusive hotels. There is no significant difference for either island in terms of gender. Additionally, for those that receive rewards, it is the general perception that these are provided fairly regardless of gender, this perception was reported by 97% of these employees in St. Lucia and 87% in Grenada.

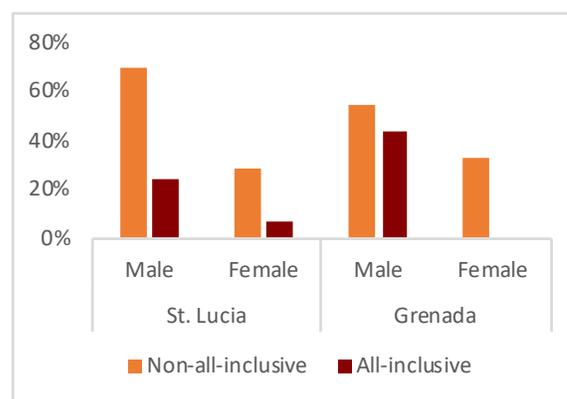
Male employees and employees of all-inclusive hotels are significantly more likely to have additional sources of income than female and non-all-inclusive employees.

Overall, 28% of employees in St. Lucia and 34% of employees in Grenada have an additional source of income besides their work at the hotel. This is largely concentrated, however, in men and employees of all-inclusive hotels. In both St. Lucia and Grenada, having an additional source of income is significantly more common among male employees than female employees and among employees of non-all-inclusive hotels than among employees of non-all-inclusive hotels. For the majority of employees with an additional source of income, the additional source is self-employment (70% in St. Lucia and 84% in Grenada). A small percentage (19% in St. Lucia and 6% in Grenada) work in the agricultural sector for an additional source of income. For those that have an additional source, on average, in St. Lucia, 67% of their income comes from work at the hotel and in Grenada 64% comes from the hotel.

Table 3.8: Additional rewards offered by hotel model

	St. Lucia		Grenada	
	Non-all-inclusive	All-inclusive	Non-all-inclusive	All-inclusive
Do you receive additional rewards?				
Male	25%	43%	27%	50%
Female	13%	41%	18%	39%
If yes, are they provided fairly regardless of gender?				
Male	100%	100%	86%	88%
Female	100%	92%	83%	86%

Figure 3.12: Do you have an additional source of income by hotel model and gender of employee

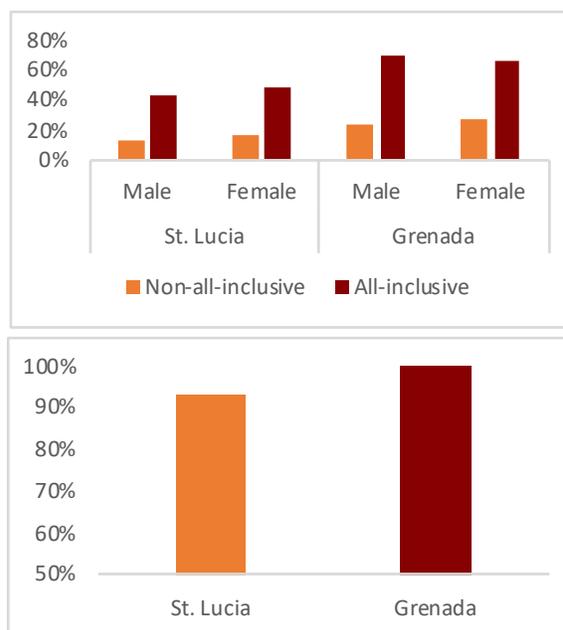


Skills Development and Career Development

All-inclusive hotels are more likely to offer training programs.

In both St. Lucia and Grenada, employees of all-inclusive hotels were significantly more likely to report that their hotel offered training programs in 2016 than employees of non-all-inclusive hotels. 46% of all-inclusive hotels in St. Lucia and 68% in Grenada offered training in the previous year, compared to 15% of non-all-inclusive hotels in St. Lucia and 25% in Grenada. All-inclusive hotels also offer more training programs, on average, than non-all-inclusive hotels, but the difference is not statistically significant. For those that participate in trainings, the hotel model does not impact satisfaction with trainings received. Training participants were equally satisfied with the quality of trainings received and generally reported a positive perception of the knowledge and skills gained and their ability to apply what they've learned in their current job and future career. 93% of employees in St. Lucia and 100% of employees in Grenada reported that the training provided met their needs.

Figure 3.13: Offer training programs by hotel model and gender of employee (top) & Satisfaction with training offered (bottom)



Promotions are rare, but employees generally believe they are given regardless of gender.

5% of employees in St. Lucia and 5% in Grenada had asked for a promotion in the previous 2 years and, on average, employees in both St. Lucia and Grenada had received less than 1 promotion in their current jobs. When given, employees largely believe promotions are given fairly regardless of gender. Only 4% of employees in St. Lucia and 6% in Grenada believe their gender makes it harder to get a raise or promotion and 76% of employees in St. Lucia and 84% in Grenada believe the best opportunities go to the most deserving employees, regardless of gender. These findings are consistent regardless of the gender of employee and the model of the hotel in which they are employed.

Table 3.9: Promotions by hotel model and gender of employee

	St. Lucia				Grenada			
	Non-all-inclusive		All-inclusive		Non-all-inclusive		All-inclusive	
	Male	Female	Male	Female	Male	Female	Male	Female
Average # of times promoted	0.313	0.156	1.143	0.552	0.308	0.353	0.438	0.722
Does your gender make it harder to get a raise	0%	3%	5%	7%	0%	15%	6%	0%
Do opportunities go to the most deserving employee, regardless of gender	88%	78%	71%	69%	96%	79%	81%	78%

Job Satisfaction

Overwhelmingly, employees have positive perceptions of the clarity of their job responsibilities.

The vast majority of employees agree that the duties and objectives of their job are clear (95% in St. Lucia and 93% in Grenada), expectations are clearly communicated (94% in St. Lucia and Grenada), rules for the same job are applied consistently (84% in St. Lucia and 95% in Grenada) and employees have enough information to do their job well (92% in St. Lucia and 97% in Grenada). Tale 3.10 below shows the data more disaggregated. There are no significant differences for male versus female employees or all-inclusive versus non-all-inclusive employees in terms of job clarity.

Table 3.10: Clarity of job responsibilities by hotel model and gender of employee

	St. Lucia				Grenada			
	Non-all-inclusive		All-inclusive		Non-all-inclusive		All-inclusive	
	Male	Female	Male	Female	Male	Female	Male	Female
The duties and objectives of my job are clear	94%	94%	100%	93%	96%	91%	81%	100%
Expectations for my job are clearly communicated	94%	94%	95%	93%	100%	94%	81%	94%
Rules for the same job are applied consistently	75%	84%	90%	83%	100%	91%	94%	94%
I have enough information to do my job well	100%	97%	90%	83%	100%	97%	88%	100%

Female employees have less positive perceptions of their relationship with their supervisor, particularly in St. Lucia.

In general, a majority of employees in both St. Lucia and Grenada have positive perceptions of their relationship with their supervisor (89% in St. Lucia and 94% in Grenada)²². However, in most categories, female employees were less likely to agree with positive statements regarding their supervisors than their male counterparts. The difference is statistically significant in St. Lucia. (82% of female respondents in St. Lucia believe they are valued by their supervisor, compared to 92% of male respondents). In terms of overall satisfaction with supervisor, all-inclusive employees in St. Lucia are less satisfied than employees of non-all-inclusive hotels (84% of all-inclusive employees are satisfied with their supervisor, compared to 94% of non-all-inclusive employees).

Table 3.11: Relationship with supervisor by hotel model and gender of employee

	St. Lucia				Grenada			
	Non-all-inclusive		All-inclusive		Non-all-inclusive		All-inclusive	
	Male	Female	Male	Female	Male	Female	Male	Female
My supervisor communicates well with subordinates	100%	91%	90%	79%	96%	91%	94%	89%
I am valued by my supervisor	94%	84%	90%	79%	88%	85%	94%	89%
Supervisors demonstrate commitment to enabling staff to grow professionally	75%	81%	81%	66%	96%	82%	88%	83%
Supervisors encourage staff to be innovate and come up with better ways of doing things	81%	84%	76%	69%	88%	85%	88%	72%
Overall I have a good relationship with my supervisor	100%	91%	86%	83%	92%	94%	94%	94%

²² Table 3.11 shows this data more disaggregated

Overall job satisfaction is high among hotel employees.

The majority of respondents (80% in St. Lucia and 85% in Grenada) expressed being somewhat or very satisfied with their jobs overall. Table 3.12 provides a more disaggregated view of this issue. Satisfaction is similar between male and female employees.

Satisfaction is slightly lower among all-inclusive employees than non-all-inclusive employees

In both St. Lucia and Grenada, satisfaction is slightly lower among employees of all-inclusive hotels than among employees of non-all-inclusive, but the difference is only significant in St. Lucia (Table A3.3). Satisfaction among all-inclusive hotel employees is 76% in St. Lucia and 82% in Grenada, while among non-all-inclusive hotel employees, satisfaction is 83% in St. Lucia and 87% in Grenada.

Table 3.12: Overall job satisfaction by hotel model and gender of employee

	St. Lucia				Grenada			
	Non-all-inclusive		All-inclusive		Non-all-inclusive		All-inclusive	
	Male	Female	Male	Female	Male	Female	Male	Female
My work gives me a feeling of personal accomplishment	94%	94%	95%	86%	100%	94%	94%	83%
I experience personal growth, such as improving skills & learning different jobs	100%	88%	100%	93%	92%	91%	81%	89%
I feel rewarded for the quality of my efforts	81%	81%	76%	66%	96%	82%	69%	78%
I have a clear path for career advancement	81%	75%	71%	76%	96%	74%	75%	78%
I am satisfied with my job	75%	88%	76%	76%	96%	79%	75%	89%

Job Security

The vast majority of employees have full-time, open-ended contracts and are not asked to take unpaid vacation.

84% of employees in St. Lucia and 97% in Grenada have full time, open-ended contracts. The remainder are part-time employees or temporary/seasonal employees. This type of contract is most common for male and female employees in both all-inclusive and non-all-inclusive hotels. Additionally, only 9% of employees in St. Lucia and 15% in Grenada are concerned about being laid off during the low season. In St. Lucia, employees of all-inclusive hotels are more concerned about being laid off during the low season, but in Grenada the opposite is true. Despite this, there is no significant difference in whether employees have been asked to take unpaid vacation. 11% of employees in both St Lucia and Grenada have been asked to take unpaid vacation during the low season.

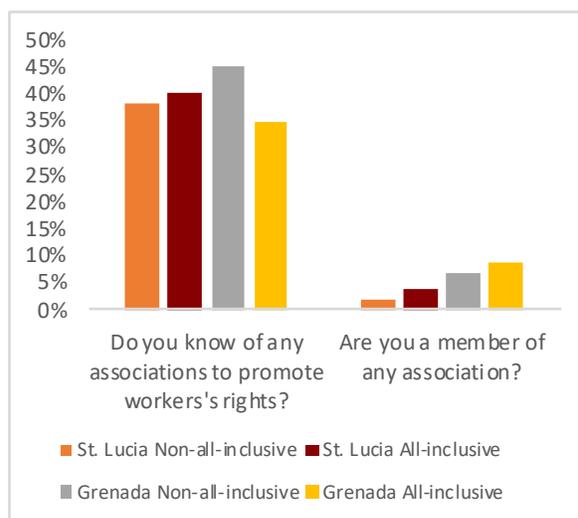
Table 3.13: Laid off/unpaid vacation during low season by hotel model

	St. Lucia		Grenada	
	Non-all-inclusive	All-inclusive	Non-all-inclusive	All-inclusive
Are you concerned you will be laid off during the low season	4%	14%	20%	6%
Have you been asked to take unpaid vacation during the low season	6%	16%	13%	9%

Workers' associations are not very common.

Only 39% of employees in St. Lucia and 41% in Grenada have heard of any associations to promote workers' rights and only 3% of employees in St. Lucia and 7% in Grenada belong to an association. Employees of all-inclusive and non-all-inclusive hotels are equally likely both to have heard of workers' associations and to be members of them.

Figure 3.14: Unions/workers' associations by hotel model



Most employees have positive perceptions of the tourism industry and want to continue working in it.

95% of employees in both St. Lucia and Grenada reported to being proud of working in the tourism and hospitality industry and 80% of employees in St. Lucia and 71% in Grenada would like to pursue a career in tourism over the longer term. 97% of employees in St. Lucia and 98% in Grenada would recommend careers in tourism and hospitality to their friends. The majority of employees are not likely to look for a different job outside of their current job. 32% in St. Lucia and 33% in Grenada are very or extremely likely to look for jobs outside their current job. 55% of employees in St. Lucia and 50% in Grenada are considering working in other industries than tourism. Figure 3.15 below shows a more disaggregated view of this issue, however, these findings do not differ significantly based on gender of the employee or based on the model of the hotel in which he/she is employed.

Figure 3.14: Perception of tourism industry by hotel model

	St. Lucia		Grenada	
	Non-all-inclusive	All-inclusive	Non-all-inclusive	All-inclusive
How likely are you to look for a different job outside of your current job?	27%	36%	35%	29%
Are you considering working in other industries than tourism?	50%	60%	50%	50%
Are you proud to work in the tourism & hospitality industry?	100%	90%	97%	91%
Over the longer term, would you like to pursue a career in the tourism & hospitality industry?	77%	82%	70%	74%
Based on your experience would you recommend careers in tourism & hospitality to your friends?	98%	96%	100%	94%

Appendix A3

Table A3.1: Determinants of compensation

	St. Lucia	Grenada
All Inclusive	532.31*** (171.06)	894.95** (438.35)
Female	-112.31 (179.02)	-716.39** (429.47)
Youth	-576.80** (282.16)	-280.70 (644.98)
Years of experience in the sector	39.40 (36.10)	193.55** (79.05)
Experience ²	-0.77 (1.11)	-4.03* (2.36)
Education		
High school	227.53 (250.10)	701.66 (655.21)
Vocational/technical	199.42 (280.96)	798.02 (680.51)
Associate/ Bachelor / Master	1319.61*** (295.39)	1848.52*** (685.82)
Occupational status: manager, department head or supervisor	426.47** (194.75)	410.44 (629.92)
Constant	889.13** (194.75)	-109.51 (714.60)
N	91	88

Note: Simple OLS estimations. Standard errors in parentheses. *p<0.10, **p<0.05, *** p<0.01
Education levels are regressed in comparison to the base level of education: less than a high school diploma

Table A3.2: Determinants of satisfaction with compensation

	Saint Lucia	Grenada
All Inclusive	-0.097* (0.005)	-0.164 (0.154)
Female	-0.12** (0.052)	-0.158 (0.175)
Youth	0.084 (0.089)	-0.012 (0.185)
Education		
High school	0.001 (0.057)	0.024 (0.191)
Vocational/technical	0.040 (0.056)	0.250 (0.185)
Associate	-0.083 (0.145)	0.371** (0.201)
Bachelor/Master	-0.472** (0.270)	-
Years of experience in sector	0.003 (0.003)	0.006 (0.008)
Compensation (log)	0.171*** (0.101)	0.140 (0.123)
Department		
Sales & marketing	0.447* (0.218)	-
Front office	0.446* (.177)	0.201 (0.309)
House keeping	0.454*** (0.180)	0.387 (0.296)
Food & beverage	0.396* (0.114)	0.211 (0.318)
Facilities & maintenance	0.198 (0.342)	0.282 (0.333)
N	89	86

Note: Logistic regressions with results reported as marginal effects at means for continuous variables and at 0 for dummy variables. Interpretation of coefficients is thus the marginal effect of moving from 0 to 1. For example, the coefficient on female refers to the effect of changing from 0 (male) to 1 (female). Standard errors in parentheses. *p<0.10, **p<0.05, *** p<0.01. Education levels are regressed in comparison to the base level of education: less than a high school diploma

Table A3.3: Determinants of overall satisfaction

	Saint Lucia	Grenada
All Inclusive	-0.216** (0.098)	-0.011 (0.102)
Female	0.073 (0.087)	0.002 (0.087)
Youth	0.029 (0.107)	0.03 (0.104)
Education		
High school	0.010 (0.100)	0.066 (0.103)
Vocational/technical	-0.07 (0.117)	0.113 (0.10)2
Associate/ Bachelor /Master	-0.689*** (0.259)	0.028 (0.161)
Years working in current job	0.011 (0.011)	0.021* (0.005)
Compensation (log)	0.200 (0.111)	0.067 (0.069)
Hotel offers training programs (Y/N)	0.067 (0.091)	0.055 (0.118)
Number of benefits offered by hotel	0.061** (0.030)	0.006 (0.018)
Number of times employee has been promoted	0.008 (0.053)	-
Flexibility of paid leave policy at hotel	0.084** (0.039)	0.108* (0.041)
N	91	67

Note: Logistic regressions with results reported as marginal effects at means. Standard errors in parentheses.
*p<0.10, **p<0.05, *** p<0.01. Education levels are regressed in comparison to the base level of education: less than a high school diploma



4. FINDINGS FROM THE AGRICULTURAL SURVEY

Introduction

The agriculture sector is linked to the tourism sector through supply of food and beverages and potentially through the dispersion of seasonal labor. There has been little research done, however, on how different types of hotels interact with the local agricultural market. In general, research shows that all-inclusive hotels tend to rely more heavily on imports, while non-all-inclusive have more locally sourced products²³. This suggests that non-all-inclusive hotels are likely to have stronger linkages to the local agricultural market.

This tendency is likely to be particularly pronounced in the Caribbean, as a result of the dependence on imported food²⁴.

In light of this, this chapter presents findings from interviews carried out with agricultural producers in St. Lucia and Grenada that currently supply to all-inclusive and non-all-inclusive hotels. This chapter explores the linkages that exist between the agricultural and tourism sectors and whether and how treatment differs when interacting with different types of hotels.

²³ Tavares and Kozak 2015; Issa and Jayawardena 2003

²⁴ Timms 2006

General Information

Agricultural establishments are classified based on the hotels to which they supply.

The three categories are (1) agricultural establishments that supply only to all-inclusive hotels (2) agricultural establishments that supply only to non-all-inclusive hotels and (3) agricultural establishments that supply to both all-inclusive and non-all-inclusive hotels.

In Grenada, agricultural establishments that supply to all-inclusive hotels outnumber the other categories.

61% supply only to all-inclusive and 39% to both, with no hotels supplying only to non-all-inclusive. In St. Lucia, the largest portion supply to both (58%), followed by those that supply only to non-all-inclusive (23%) and those that supply only to all-inclusive (19%).

The hotel supplying agricultural sector is dominated by men.

In St. Lucia, 81% and in Grenada 79% of respondents were male. Only 33% of firms in St. Lucia and 39% in Grenada have females amongst the owners and women own 50% or less in the majority of these firms. Additionally, 16% of firms in St. Lucia and 22% in Grenada have a female top manager.

Most establishments were family owned/sole proprietorships

Those interviewed were largely the owners themselves (86% in St. Lucia and 94% in Grenada) and largely operated family owned/sole proprietorships (72% in St. Lucia and 94% in Grenada). Most agricultural establishments are not part of a larger farm. Only 1 respondent in St. Lucia was part of a larger farm. Establishments are largely owned by individuals, companies or organizations from the country which the establishment operates. 95% of firms in St. Lucia and 94% of firms in Grenada are fully owned by individuals, companies or organizations from St. Lucia or Grenada, respectively.

Table 4.1: Characteristics of agricultural establishments in St. Lucia and Grenada

	St. Lucia	Grenada
Hotel model supplied to		
All-inclusive	19%	61%
Non-all-inclusive	23%	
Both	58%	39%
Gender of respondent		
Male	81%	79%
Female	19%	22%
Are there women amongst ownership?	33%	39%
Respondents' role at establishment		
Owner	86%	94%
Manager	7%	
Other	7%	6%
Legal structure		
Family owned/ sole proprietorship	72%	94%
Partnership	7%	6%
Limited Liability Company	16%	
Other	4%	
Is the establishment part of a larger farm?	2%	0%

Most agricultural establishments perform farming, harvesting, selling/reselling, and transporting as part of their regular operations, while processing and packing is more limited.

81% of agricultural establishments in St. Lucia and 94% in Grenada undertake farming, selling/reselling and transporting. Harvesting is the next most common activity (76% in St. Lucia and 94% in Grenada). Packaging is undertaken by 42% of firms in St. Lucia and 39% of firms in Grenada. Processing is done by 26% of firms in St. Lucia and 17% in Grenada. Establishments that supply to both all-inclusive and non-all-inclusive hotels are doing less farming and harvesting and more processing and packaging than establishments that only sell to one model or the other. In St. Lucia, agribusinesses that sell to both hotel models are 32% involved in processing and 48% in packaging, compared to those that supply only to all-inclusive, 25% of which are in processing and 38% in packaging and to only non-all-inclusive 10% are in processing and 30% are in packaging. In Grenada, 29% of those that supply to both are in processing and 57% in packaging, while among those that supply only to all-inclusive, 9% are in processing and 27% in packaging.

Table 4.2: Main activities

	St. Lucia			Grenada	
	All-inclusive	Both	Non-all-inclusive	All-inclusive	Both
Farming	100%	72%	90%	100%	86%
Harvesting	88%	68%	90%	100%	86%
Processing	25%	32%	10%	9%	29%
Packaging	38%	48%	30%	27%	57%
Selling/ reselling	100%	100%	100%	100%	100%
Transporting	100%	100%	90%	91%	57%

The majority of establishments have been operating for more than 10 years and are not registered.

On average, establishments have been operating for 17 years in St. Lucia and for 14 years in Grenada. In St. Lucia, establishments that supply only to all-inclusive hotels have been operating for longer, on average, than establishments that supply to both or to only non-all-inclusive hotels. There is no significant difference in Grenada. 19% in St. Lucia and 22% in Grenada belong to a cooperative, organization or association. 40% of establishments in St. Lucia and 33% in Grenada are formally registered. In St. Lucia, establishments that supply to both all-inclusive and non-all-inclusive hotels are the significantly more likely to be registered than those that supply only to all or only to non-all-inclusive hotels.

Table 4.3: Formal registration

	St. Lucia	Grenada
All	25%	36%
Both	52%	29%
Non	20%	

In both St. Lucia and Grenada, establishments that supply to both all-inclusive and non-all-inclusive hotels have the highest average sales.

This difference, however, is not statistically significant. Establishments that supply to both all-inclusive and non-all-inclusive hotels also provide to a larger number of hotels. When accounting for this difference in the number of hotels supplied to, hotels that provide to both still have higher average sales.

Table 4.4: Average total sales and average sales per hotel

	Average sales			
	St. Lucia		Grenada	
	2014-5	2015-6	2014-5	2015-6
All	193,333	1,766,667	30,000	37,000
Both	6,737,400	6,310,188	98,667	286,000
Non	30,000	31,000	-	-
Average sales per hotel				
All	114,167	105,833	13,590	18,387
Both	2,650,482	2,440,342	15,852	38,667
Non	10,000	10,333	-	-

Business Linkages to Tourism & Hospitality

For establishments that supply to both all-inclusive and non-all-inclusive hotels, the larger portion of sales is generated through selling to all-inclusive hotels.

In St. Lucia, 64% of sales are to all-inclusive hotels and in Grenada, 53% of sales are to all-inclusive for establishments that supply to both.

Agricultural establishments that supply to both all-inclusive and non-all-inclusive hotels are the most likely to sell products grown by other farmers.

33% of establishments in St. Lucia and 44% in Grenada process, package and sell/resell products that are not grown or harvested by the establishment. In both St. Lucia and Grenada, suppliers of both models represent the largest portion of producers that sell products grown by others. This is particularly true in Grenada where 85% of suppliers to both models sell products grown by others, compared to only 18% of those that supply only to all-inclusive hotels. A similar pattern is also observed in St. Lucia, but the difference is not statistically significant. In St. Lucia, these establishments procure from a larger number of other entities, on average, but in Grenada the number of entities is the same. Establishments that supply to both also grow a smaller percentage of what they sell.

Table 4.5: Selling products grown by other farmers

Sell/resell from other entities		
	St. Lucia	Grenada
All-inclusive	25%	18%
Both	36%	85%
Non-all-inclusive	30%	-
Number of entities procure from		
All-inclusive	4	7
Both	44	6
Non-all-inclusive	3	-
Percentage of the products sold that were grown or harvested by the establishment		
All-inclusive	38%	58%
Both	13%	48%
Non-all-inclusive	33%	-

Establishments that supply to both all-inclusive and non-all-inclusive hotels are slightly more diversified in terms of products sold.

The most common products on both islands for all types of establishments are fruits and vegetables, followed by herbs. In both St. Lucia and Grenada, establishments that supply only to all-inclusive hotels sell only these three products. In comparison, those that supply to both types of hotels also provide dairy, fish and cereals.

The most commonly mentioned factors important for being selected as a supplier are adequate product quality, timely delivery and price.

In St. Lucia, for establishments that sell to both models or only non-all-inclusive, the most important factor is adequate product quality. In contrast, for establishments that sell to only all-inclusive hotels, price is the most important factor. In Grenada, adequate product quality is seen as the most important factor for both types of establishments.

Table 4.7: Most important factors for being selected as a supplier

	St. Lucia			Grenada	
	All-inclusive	Both	Non-all-inclusive	All-inclusive	Both
Most important factor	Price	Adequate product quality	Adequate product quality	Adequate product quality	Adequate product quality
Second most important factor	Adequate product quality	Timely delivery	Timely delivery	Price	Price
Third most important factor	Timely delivery	Price	Access to quality inputs	Timely delivery	Timely delivery

Agricultural establishments receive similar treatment in dealing with all-inclusive and non-all-inclusive hotels.

On both islands, the vast majority (more than 95%) of establishments have verbal, rather than written formal contracts with the hotels. The vast majority expect to continue supplying to the hotel for the next 5 years. Agricultural establishments in Grenada were more optimistic regarding expectations of their share of supplies to the hotels to increase, but there is not a significant difference between all-inclusive versus non-all-inclusive hotels in either St. Lucia or Grenada.

Most establishments are paid by check – 100% of hotels in St. Lucia pay by check. In Grenada, 88% of all-inclusive hotels pay by check, with the remainder largely paying in cash. Both all-inclusive and non-all-inclusive hotels in St. Lucia and Grenada largely pay in a timely manner.

Table 4.6: Types of products

	St. Lucia			Grenada	
	All-inclusive	Both	Non-all-inclusive	All-inclusive	Both
Dairy		4%	10%		
Fish		8%	0%		14%
Fruits	63%	52%	60%	82%	71%
Vegetables	88%	60%	70%	100%	86%
Herbs	13%	36%	40%	9%	14%
Cereal		4%			

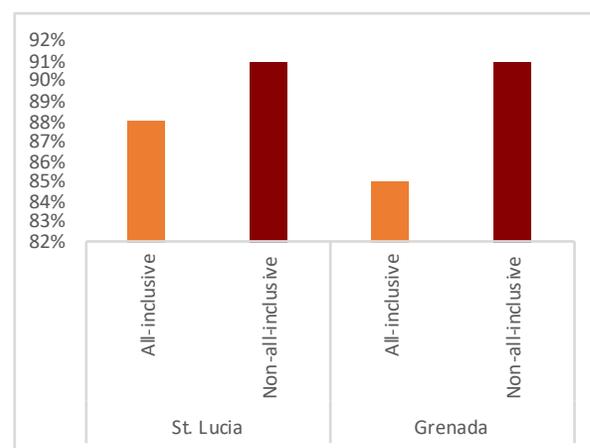
Table 4.8: Treatment by all-inclusive and non-all-inclusive hotels

	St. Lucia		Grenada	
	All-inclusive hotels	Non-all-inclusive hotels	All-inclusive hotels	Non-all-inclusive hotels
Years supplying	7.5	6.5	7.7	4.9
Type of contract	95% no formal contract	96% no formal contract	100% no formal contract	100% no formal contract
Expect to continue supplying	93%	96%	93%	100%
Expect share of supplies to increase	57%	62%	91%	83%
Receive payments in timely manner	80%	78%	100%	100%
Mode of payment-Check	100%	100%	88%	100%

Satisfaction with the relationship overall is slightly lower for all-inclusive hotels than for non-all-inclusive hotels.

This is true in both St. Lucia and Grenada, but the difference is not statistically significant.

Figure 4.1: Satisfaction with hotels



Workforce

In St. Lucia managers of establishments that supply to both models have the most experience and the highest levels of education.

In St. Lucia, managers of establishments that supply only to non-all-inclusive hotels have the most experience, while in Grenada, managers of establishments that supply to both types of hotels have the most experience. In both St. Lucia and Grenada managers of establishments that supply to both hotel types have the highest levels of education.

Table 4.9: Years of experience of manager

	Years of experience in the sector		Years of experience at the establishment	
	St. Lucia	Grenada	St. Lucia	Grenada
All-inclusive	31	13	25	12
Both	17	28	10	18
Non-all-inclusive	21	-	14	-

In both St. Lucia and Grenada, in terms of permanent employees, male employees have longer average duration of employment than female employees.

The vast majority of establishments did not have any temporary employees that were previously employed in the tourism sector.

For temporary employees, the reverse is true, with female employees being employed for longer average durations than male employees.

Only 2 establishments in St. Lucia and 3 establishments in Grenada reported that any temporary employees were previously employed in the tourism sector.

Table 4.10: Average length of employment of employees

	Permanent (years)				Temporary (months)			
	Male employees		Female employees		Male employees		Female employees	
	St. Lucia	Grenada	St. Lucia	Grenada	St. Lucia	Grenada	St. Lucia	Grenada
All-inclusive	13.4	6.8	2.7	2.7	3.5	4	8	4
Both	4.3	8.2	2.9	4.7	3	9.5	5.9	9.5
Non-all-inclusive	5	-	3	-	3	-	4	-

Agribusinesses that supply to both all-inclusive & non-all-inclusive hotels provide the most employment.

Table 4.11: Average number of male and female employees

In both St. Lucia and Grenada, these establishments have the highest average number of employees. This is true for both male and female employees. The majority of employees have high school or less education (74% of employees in St. Lucia and 70% in Grenada). Establishments that sell to all-inclusive, non-all-inclusive or both largely have the same profile in terms of education of employees.

	Male employees		Female employees	
	St. Lucia	Grenada	St. Lucia	Grenada
All-inclusive	3.3	3.5	1	.55
Both	7.7	4.3	6.4	2
Non-all-inclusive	3.3	-	1	-

33% of respondents in St. Lucia and 61% in Grenada reported that they thought there were advantages to employing women, rather than men.

40% of employers in St. Lucia and 39% in Grenada reported that they saw advantages to employing younger employees (24 or younger), rather than older.

These managers/owners largely reported that women were more reliable and committed to their jobs or that women were better suited for certain tasks, such as cleaning and packaging produce. Those that did not see any advantages either reported that men were better employees because they had more physical strength or they reported that women and men were equally capable of doing the job.

Advantages were seen as the strength and energy and ability to innovate and adapt to new ideas that young people can bring. For those that did not see advantages, most reported that they found younger employees to be irresponsible and unreliable.

In St. Lucia, among permanent workers, family members receive significantly higher wages than non-family workers.

On average, family members in St. Lucia are paid a daily wage of 107 XCD, while non-family members are paid 56 XCD per day. In general, agricultural establishments pay men and women the same daily wage. On average, female youth make less than their older counterparts. However, when comparing within the same establishment, women of all ages are paid the same.

Table 4.12: Average daily wages of different types of employees (XCD)

		Permanent		Temporary	
		St. Lucia	Grenada	St. Lucia	Grenada
Total	18-24	56.5	46.7	55	50.6
	25+	58.4	63.75	52	49.4
	Total	55.9	64.1	51.4	48.75
Female	18-24	52	35	53.3	45
	25+	57.5	50	50	44.3
	Total	57.5	50	50	42.9
Family Members	18-24	80.8	35	55	35
	25+	106.8	48	55	42.5
	Total	106.8	48	55	42.5

Business Growth

The vast majority of agricultural establishments want to expand, and the most common obstacle is access to finance.

79% of establishments in St. Lucia and 89% in Grenada are planning to expand in the coming years. In St. Lucia, establishments that supply to both hotel models are significantly more likely to want to expand business operations than those that supply to only one or the other. In Grenada, these establishments are equally likely to want to expand. Access to finance is the most commonly mentioned business obstacle in both St. Lucia and Grenada.

Table 4.13: Major business environment obstacles

	St. Lucia			Grenada	
	All-inclusive	Both	Non-all-inclusive	All-inclusive	Both
Access to finance	50%	24%	10%	45%	29%
Access to land	13%	20%	10%	9%	14%
Access to market	0%	20%	10%	36%	14%
Business licensing & permits	0%	4%	0%	0%	14%
Corruption	25%	16%	10%	0%	29%
Crime, theft, & disorder	25%	12%	0%	18%	43%
Customs & trade regulations	13%	12%	0%	0%	0%
Electricity	13%	12%	0%	9%	14%
Inadequately educated workforce	13%	8%	0%	27%	0%
Labor regulations	0%	0%	0%	0%	0%
Political instability	13%	8%	0%	0%	0%
Practices of competitors in the informal sector	25%	12%	0%	9%	0%
Tax administration	0%	12%	0%	0%	0%
Tax rates	0%	4%	0%	18%	0%
Transport	0%	8%	0%	18%	0%

Agricultural establishments receive the same types of training, regardless of the type of hotel to which they supply.

65% of establishments in St. Lucia and 67% in Grenada have received some sort of training for their agricultural business. Farmers have received all types of training. In St. Lucia, 42% received formal external training, 35% received formal internal training and 25% received informal on-the-job training. In Grenada, 39% have received formal external training, 28% received formal internal training and 50% received informal on-the-job training.

If firms received a 3-year contract for purchase of products that meant output would double from current level, they would hire, on average 1.4 formally trained workers and 5 general workers in St. Lucia and 2.5 formally trained and 4 general workers in Grenada.

When comparing hiring across different types of establishments in St. Lucia, hotels that supply to both business models would require the most general workers, while hotels that only supply to all-inclusive hotels would hire the most formally trained workers. In Grenada, hotels that supply to both require a higher number of formally trained workers than those that supply only to all-inclusive, while those that supply all-inclusive require a higher number of general workers.

Table 4.14: Average number of workers hired if output doubled

	Formally trained		General workers	
	St. Lucia	Grenada	St. Lucia	Grenada
All-inclusive	2.3	1.6	2.9	4.8
Both	1.3	3.9	6.4	3.1
Non-all-inclusive	1		3.1	

CONCLUSIONS

As the paper has demonstrated, all-inclusive hotels provide the majority of jobs, compared to non-all-inclusive hotels and provide better jobs from the perspective of wages and benefits. All-inclusive hotels are a small portion of the hotel market in terms of number of establishments, but contribute almost two-thirds of the total number of hotel jobs on both islands. Per hotel, the average number of employees in all-inclusive hotels is more than 5 times the average number of employees in non-all-inclusive hotels. From the employers' perspective, these hotels also pay more, in each occupational category, and offer more benefits to employees. Thus, from the employers' perspective, all-inclusive hotels present an opportunity for considerably expanding employment with significant quantitative benefits for employees. However, as the employee survey demonstrated, this view is not completely shared by the employees.

Employees largely believe that tourism is a good sector to work in. There is a high level of satisfaction among employees. The vast majority of employees are proud to be working in the tourism industry, would like to pursue a career in tourism over the longer term and would recommend careers in the tourism industry to their friends. These perceptions are highly positive in both all-inclusive and non-all-inclusive hotels and among both male and female employees.

Tourism offers many employment opportunities for women, but there are significant gender gaps. The employee survey provides evidence of occupational segregation and a gender compensation gap. Yet, women make up the majority of the workforce and both male and female employees largely believe there are no gender wage gaps. Achieving gender equality in the tourism sector will thus require policies that go beyond gender diversity to address the norms and information asymmetries that lead to gender-based disparities. Trainings for female employees should focus on supporting women's movement into jobs

with fewer women and into positions of responsibility and leadership, on addressing information asymmetries that lead to women being unaware of gender pay gaps and on empowering women to be able to apply for different positions and ask for promotions and raises. These trainings should be planned with women's specific time constraints in mind (i.e. women often have more caretaking responsibilities at home than men). Additionally, hotels could offer specific options to help female employees balance work and home responsibilities, such as childcare options or specific guidelines for flexible work schedules.

Working conditions in all-inclusive hotels reveal a nuanced picture. On the one hand, the level of compensation, benefits and additional rewards received by all-inclusive employees is higher than for employees at non-all-inclusive hotels. However, employees of all-inclusive hotels are less satisfied with their job. This could be due to their working conditions, such as higher levels of stress and working more night shifts than employees of non-all-inclusive hotels. This suggests that in terms of developing the tourism sector, all-inclusive hotels provide an opportunity for expanding employment, but with somewhat lower quality jobs.

As it relates to linkages with the agriculture sector, all-inclusive hotels are the major buyer of agricultural products. Most agricultural establishments, in both St. Lucia and Grenada, supply to all-inclusive hotels. Only 10% of establishments in St. Lucia and no establishments in Grenada supply only to non-all-inclusive hotels. The rest supply either only to all-inclusive hotels or to both all-inclusive and non-all-inclusive hotels. Of those that supply to both all-inclusive and non-all-inclusive hotels, the majority of sales come from all-inclusive hotels.

Establishments that supply to both all-inclusive and non-all-inclusive hotels are the largest. When comparing establishments that supply only to all-inclusive, only to non-all-inclusive or to both types of hotels, the establishments that supply to both have the

highest sales, supply to the largest number of hotels and have the most employees. Establishments that only supply to one or the other have similar characteristics and experiences.

There seem to be no systematic differences in the treatment received from different types of hotels. When asked about the treatment received from different hotels, both all-inclusive and non-all-inclusive, agricultural establishments reported they were similar in terms of the type of contract, the mode of payment, and any delays in receiving payments. Agricultural establishments reported slightly higher overall satisfaction with non-all-inclusive hotels, but the difference was not significant.

Policy implications and areas of further research:

The hotel industry provides opportunities for women's participation in the workforce, women's entrepreneurship, and women's leadership. In both St. Lucia and Grenada, women are well represented at all levels of employment, including owners, managers, supervisors, operational staff, etc.

Despite high levels of representation, inequality persists. Findings suggest that women owners and managers face more risk in terms of harassment and that the government does not treat male and female-owned businesses the same, which constrains the ability of women to grow their businesses. Employers reported that agencies regulating SMEs prefer to deal with men due to cultural perceptions. Thus, policies and strategies implemented by these agencies should be made more gender aware and the norms and stereotypes that lead to the preference of men should be addressed within the agencies.

Training and business development to support women's entrepreneurship could also help women to scale up business operations. Most employers believe that, in the tourism sector, men are more likely to run large businesses than women. Currently there are few, if any, programs to support

women's entrepreneurship. The majority of employers reported that the lack of specialized business education and training for women hindered their ability to run large businesses, but 95% of employers were in support of government policies to support gender equality in the tourism sector. Business development services targeted to supporting female entrepreneurship can help them to access finance and information to scale up their businesses and close the gender gap.

Additionally, the employer survey points to a need for gender mainstreaming in corporate policies of hotels. Employers indicate that they see gender equality as an important objective, but most are not actively taking steps to achieve it. Female employees face a gender wage gap and have lower average promotion rates, despite positive perceptions of female employees' skills and job performance. Given the important role played by women throughout the sector, hotel policies should incorporate these issues to underscore gender equality in hiring, promotion, treatment and compensation of employees.

The employee survey provides evidence of occupational segregation and a gender compensation gap. Yet, women make up the majority of the workforce and both male and female employees largely believe there are no gender wage gaps. Achieving gender equality in the tourism sector will thus require policies that go beyond gender diversity to address the norms and information asymmetries that lead to gender-based disparities. Trainings for female employees should focus on supporting women's movement into jobs with fewer women and into positions of responsibility and leadership, on addressing information asymmetries that lead to women being unaware of gender pay gaps and on empowering women to be able to apply for different positions and ask for promotions and raises. These trainings should be planned with women's specific time constraints in mind (i.e. women often have more caretaking responsibilities at home than men). Additionally, hotels could offer specific options to help female employees balance work and home responsibilities,

such as childcare options or specific guidelines for flexible work schedules.

While this technical note is a useful first step towards understanding the differences between the impact of all-inclusive and non all-inclusive tourism development models on the quality of jobs for women, other research areas could also be supported by the data collected. For example, from our data, it appears that there are some linkages between the size of the hotel and offering all-inclusive services. It would be interesting further what are the determinants for hotels to start offering all-inclusive services. In addition, why all-inclusive hotel employees are facing more stress and what could be done to alleviate it; what are driving the pay differences. Moreover, more detailed research could be done by employee types (front desk versus management), and their experiences. Or why do all-inclusive hotels experience more access to finance challenges in Saint Lucia as opposed to non-all-inclusive hotels. Also, are there interesting comparisons to be made between the tourism and hotel models/policies in St. Lucia and Grenada that could 1) shed light on some of the differences between respondents from the two countries, and 2) offer insights into what is behind employee and manager satisfaction? As for agribusinesses, it would be interesting to understand what the reasons are behind the fact that only 5% of businesses have formal contracts with hotels, and whether having formal contracts would bring any benefits for the agribusinesses. These are only a sample of a few areas of additional research, and other analysis could also be contemplated based on the data gathered.

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GLOSSARY OF TERMS AND ACRONYMS

All-inclusive hotel	<p>Hotel that offers an option for guests to pay for all major expenses as one package. This includes, at a minimum, lodging, three meals daily, drinks (alcoholic and non-alcoholic), and gratuities.</p> <p>For the purposes of this study, any hotel that offers an all-inclusive package is considered an all-inclusive hotel, regardless of the proportion of total sales made up by all-inclusive packages versus non-all-inclusive packages</p>
Business environment	The various domains that affect the day-to-day experiences of firms. Examples include accessing finance, meeting regulatory requirements, infrastructure, corruption, etc.
FAO	Food and Agriculture Organization of the United Nations
Formal training	Training that has a structured, defined curriculum
LAC	Latin America and the Caribbean
Large hotel	Hotel with 100 or more employees
Leakage rate	The proportion of tourism expenditures that leaks into imports and pays foreign factors of production, rather than staying in the local economy
Major obstacle	Firms are asked to rate an individual business environment obstacle on a 5 point scale. If the firm chooses a 4 or a 5, then that obstacle is a “major obstacle” for the firm
Medium sized hotel	Hotel with 20-99 employees
OAS	Organization of American States
OECS	Organization of Eastern Caribbean States. The OECS is an intergovernmental organization with ten member states: 6 independent- Antigua and Barbuda, Dominica, Grenada, St. Kitts and Nevis, St. Lucia, and St. Vincent and the Grenadines and 4 non-independent: Montserrat, British Virgin Islands, Anguilla and Martinique
SLTHA	St. Lucia Tourism and Hotel Association
Small hotel	Hotel with less than 20 employees
SME	Small and medium sized enterprises
Top manager	The most senior-level manager of the firm, who is making the key decisions on a day-to-day basis
UN	United Nations
USD	United States Dollar
XCD	Eastern Caribbean Dollar. Exchange rate is approximately 1 XCD equals 0.37 USD
Youth employment	Workers 24 and younger

ANNEX 1: ADDITIONAL INSIGHTS ON EMPLOYMENT IN FOREIGN-OWNED HOTELS

Fully foreign-owned hotels provide jobs with higher compensation and rewards, but with potentially negative implications for workers in terms of job quality.

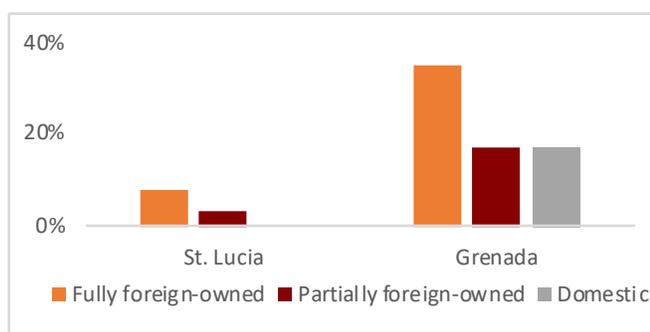
A small portion of the sample is foreign-owned hotels. In St. Lucia, 24% of employees are employed at fully foreign-owned hotels and another 12% are employed at partially foreign-owned hotels²⁵. In Grenada, 18% are employed by fully foreign-owned hotels and 6% by partially foreign-owned hotels. This small sample size reduces the power of statistical comparisons; however, important insights can be gained by investigating the relationship between ownership characteristics and job quality for employees.

	St. Lucia		Grenada	
	Fully Foreign-Owned	Domestic	Fully Foreign-Owned	Domestic
Hours worked per week	40	40	49	40
Days stressed at work per week	1.8	1.6	1.8	1.4

In fully foreign-owned hotels, employees tend to work more and experience greater stress than employees at domestic hotels. In Grenada, employees at foreign-owned hotels work 49 hours each week, on average, compared to 40 hours each week for employees of domestic hotels and 41 hours for employees at partially foreign-owned hotels. In St. Lucia, employees at the different types of hotels work more comparable hours, on average. Additionally, the level of stress and the number of days in which workers feel stressed is slightly higher for fully foreign-owned employees.

Employees at fully foreign-owned hotels are also more likely to have been injured at work. In Grenada, 35% of employees of fully-foreign owned hotels have been injured at work, compared to 17% of partially foreign-owned hotels and 17% of domestic hotels. In St. Lucia, workplace injuries are less common than in Grenada, but fully-foreign owned hotels have the highest rate of injury. 8% of fully-foreign owned hotel employees have been injured, compared to 3% of domestic and 0% of partially foreign-owned in St. Lucia.

Figure 1: Workplace injuries by hotel model



²⁵ Foreign is considered any country outside of the country in which the hotel is located, i.e. St. Lucia or Grenada. Fully foreign owned hotels have 100% foreign ownership. Partially foreign-owned have been 44%-99% foreign ownership.

Observation of negative experiences is more common at foreign-owned hotels in Grenada.

In Grenada, employees of fully foreign-owned hotels more commonly reported observing threats, pushing and shoving and racial discrimination than employees at domestic and partially foreign-owned hotels.

Figure 2: Observation of negative experiences in Grenada

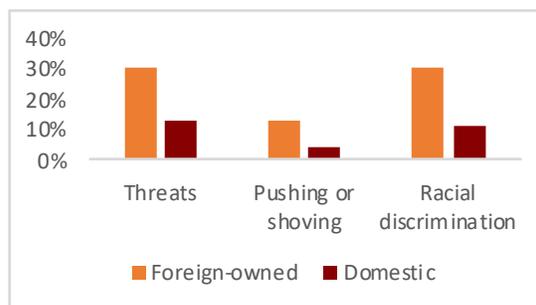


Table 48: Compensation by hotel

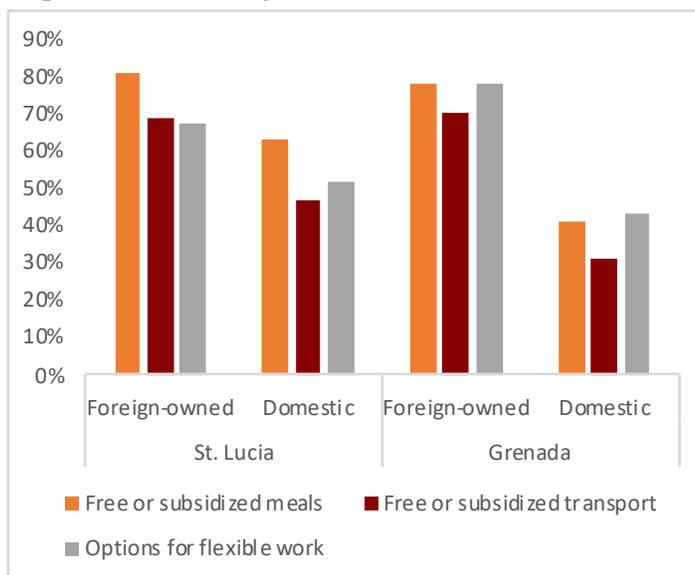
	St. Lucia	Grenada
Fully foreign-owned	2397.96	2869.44
Partially foreign-owned	1949.17	2653.33
Domestic	1616.53	1560.50

Yet, employees at foreign-owned hotels are more highly compensated than employees at domestic hotels. The highest paid employees in both St. Lucia and Grenada are employees of fully foreign-owned hotels. On average, these employees make 449 XCD more than partially foreign-owned and 781 XCD more than domestic hotel employees in St. Lucia. In Grenada, fully foreign-owned hotel employees receive 216 XCD more than partially foreign-owned and 1309 XCD more than domestic hotels, on average.

Employees at foreign-owned hotels also receive more additional rewards.

In both St. Lucia and Grenada, fully foreign-owned hotels offer more benefits, including free or subsidized meals, transport and options for flexible work. Foreign owned hotels in Grenada also offer more additional rewards. In both St. Lucia and Grenada, foreign owned hotels are more likely to offer training programs than domestic hotels. In Grenada, foreign owned hotel employees are also promoted at higher rates than domestic hotel employees.

Figure 3: Benefits by hotel model



ANNEX 2: ADDITIONAL INSIGHTS ON EMPLOYMENT IN ALL-INCLUSIVE HOTELS

The key trends that emerge when looking at fully-all-inclusive hotels support the finding that fully-all-inclusive hotels offer a large number of jobs and higher compensation, but the jobs are of lower quality for the employees.

When disaggregating all-inclusive hotels based on whether they offer only all-inclusive or offer both all-inclusive and non-all-inclusive, there are only a few that offer only all-inclusive. Most of the hotels interviewed in St. Lucia and Grenada offered no all-inclusive services or offered both all-inclusive packages and non-all-inclusive services. In the sample, only 10% of employees in St. Lucia and 21% of employees in Grenada were employed at hotels that offered only all-inclusive services. This represents 3 hotels in St. Lucia and 4 hotels in Grenada. This small sample size reduces the power of statistical comparisons; however, important insights can be gained by investigating the relationship between hotel model and job quality for employees.

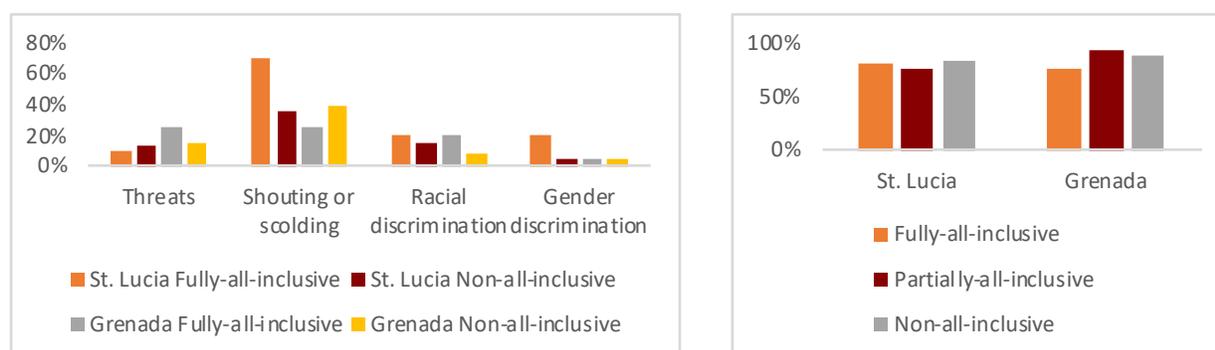
Table 1: Average compensation of employees by hotel model (XCD)

	St. Lucia	Grenada
Fully-all-inclusive	3556.25	2349.89
Partially all-inclusive	1953.11	2740.71
Non-all-inclusive	1468.96	1502.79

Particularly in St. Lucia, among hotels that are fully all-inclusive, employees receive greater compensation. In St. Lucia, the highest paid employees work at fully-all-inclusive hotels. On average, these employees make 1603 XCD more than employees at partially all-inclusive hotels and 2087 XCD more than employees at non-all-inclusive hotels. In Grenada, employees at fully all-inclusive and partially all-inclusive hotels have comparable levels of compensation. This compensation is substantially higher than employees at non-all-inclusive hotels. These hotels are also more likely to offer benefits, including meals and transport, and more likely to be offering additional rewards.

However, job quality within these jobs is lower than partially- or non-all-inclusive hotels. Observing threats, shouting and scolding, racial discrimination and gender discrimination is more common in fully-all-inclusive hotels than in other types of hotels. In Grenada, employees of fully-all-inclusive hotels are the least satisfied employees. In St. Lucia, satisfaction among employees fully-all-inclusive and partially-all-inclusive hotels is similar.

Figure 1: Observation of negative experiences (lhs) and overall job satisfaction (rhs) by hotel model



ANNEX 3: HOTEL MANAGER/OWNER QUESTIONNAIRE

Objective. This survey has the goal of evaluating impact of non-all-inclusive vs. all-inclusive tourism models on jobs for youth and women in the Organization of Eastern Caribbean States (OECS) countries. The results of the survey will be analyzed to develop policy recommendations on improving gender equality in the tourism sector.

Confidentiality. The data collected through this questionnaire will be used in aggregated form and the information provided will be kept anonymous and strictly confidential.

A. GENERAL INFORMATION

Country

1. St. Lucia
2. Grenada

1. **Name of your hotel:** _____

2. **Your gender:** 1. Male 2. Female

3. **What is your role at this establishment?**

INTERVIEWER: IF RESPONDENT IS BOTH OWNER AND MANAGER, SELECT OWNER

1. Owner. If yes, share of ownership (%) _____
2. General Manager
3. Manager
4. Other, please specify: _____

4. **Is this establishment part of a larger firm?**

1. Yes, (If yes, number of business entity/establishments that form the firm _____ AND name of firm _____)
2. No, a firm on its own.

INTERVIEWER. PLEASE READ IF q4a = YES: "If this establishment is part of a larger firm, please answer the following questions from the point of view of this establishment only."

5. **What month does this establishment's fiscal year begin?** _____ **Start Month-End Month**

6. **How would you characterize the nature of your business? (Select only one answer.)**

1. All-inclusive
2. Non all-inclusive
3. Offer both options. Please specify:
3a. All-inclusive (% share of business): _____;
Non all-inclusive (% share of business): _____
4. Other. Please specify: _____

7. **How many rooms does your hotel have currently?** _____

8. **In what year did this hotel begin its current operations in the country?**
Year _____

9. **Is this establishment formally registered?**

1. Yes. If yes, please specify the year when it was registered _____
2. No
3. Don't know (-9)

10. Are there any women amongst the owners of this establishment? 1. Yes 2. No

10a. What percentage of this hotel is owned by women? _____

11. Is the top Manager female?

1. Yes 2. No

12. What percentage of this establishment is owned by each of the following:

Response Options	Percent	DK=-9
1. Private individuals, companies or organizations from <u>Country</u>		
2. Private individuals, companies or organizations from other Caribbean countries		
3. Private individual, companies or organizations from countries outside Caribbean		
4. Government or State		
5. Other		
6. Total		

INTERVIEWER PLEASE CHECK THAT THE SUM OF PERCENTAGES IS EQUAL TO 100%

13. Is your establishment open year-round or do you close it for some days or months?

1. Open year round
2. Closed for some days

13a. How many days, on average in a calendar year, is this hotel closed? _____
Days

13b. If you close your establishment for some days or months, please identify the reasons.

Reasons	YES=1/NO=2
1. Due to the regular maintenance of the accommodation facilities	
2. There is no demand for our tourist services at that time	
3. Adverse weather conditions	
4. No airplane flights to the country	
5. Other, please specify _____	

14. Please provide the information about when your business experiences high season and low season.

1. High season: From month _____ to month _____
2. Low season: From month _____ to month _____

15. What is your average room occupancy rate (%)?

1. High season: _____ %
2. Low season: _____ %

B. ABOUT YOUR EMPLOYEES

16. Are any of the following labor issues obstacles to the growth of this establishment?

Issues	Yes	No
1. Employment protection legislation / labor code and laws		
2. Difficult to find workers/ few applicants		
3. Difficult to find skilled workers		
4. Cost of wages		
5. Minimum wage (if exists in the country)		
6. Payroll taxes and social security / pension payments		
7. Workers lack experience		
8. Workers are not reliable		
9. High worker turnover		
10. Other, please specify _____		

INTERVIEWER PLEASE READ:

“**Permanent employees** are defined as all paid employees that are contracted for a term of one or more fiscal years and/or have a guaranteed renewal of their employment contract.

Temporary (seasonal) workers are all paid short-term (i.e. for less than a year) employees with no guarantee of renewal of contract employment.”

17. Are the following benefits offered to permanent workers?

Benefits	Permanent Workers
1. Free or subsidized housing	1.Y 2.N
2. Free or subsidized meals	1.Y 2.N
3. Free or subsidized transport	1.Y 2.N
4. Free or subsidized child care	1.Y 2.N
5. Unsubsidized child care	1.Y 2.N
6. Options for flexible working hours	1.Y 2.N
7. Support programs and facilities to help reconcile work and family life (lactation rooms, child play areas, etc.)	1.Y 2.N
8. Other, please specify _____	1.Y 2.N

17a. Are the following benefits offered to temporary workers?

Benefits	Temporary Workers
1. Free or subsidized housing	1.Y 2.N
2. Free or subsidized meals	1.Y 2.N
3. Free or subsidized transport	1.Y 2.N
4. Free or subsidized child care	1.Y 2.N
5. Unsubsidized child care	1.Y 2.N
6. Options for flexible working hours	1.Y 2.N
7. Support programs and facilities to help reconcile work and family life (lactation rooms, child play areas, etc.)	1.Y 2.N
8. Other, please specify _____	1.Y 2.N

C. CORPORATE POLICY ON PROMOTING GENDER EQUALITY

18. In your establishment, how would you rate the importance of gender diversity as a strategic objective?

1. Very high
2. High
3. Moderate
4. Low
5. Very Low
6. Don't know (-9) *SPONTANEOUS*

19. In your establishment's employment decisions, are any of the following reasons for employing female workers?

Reasons	Yes=1	No=2	D/K=-9 (Spontaneous)
1. Company is committed to socially responsible employment practices			
2. Female workers are more reliable and committed to their work than male workers			
3. Absence of male workers with suitable skills in the local labor market			
4. Female workers are less expensive to employ than male workers			
5. Women have less expectations for promotion			
6. Company does not have any gender-specific employment policy			
7. Other reasons. Please specify _____			

20. Has this establishment undertaken any measures to recruit, retain, promote, and develop women?

1. Yes
2. No

20a. If yes, please identify the measures undertaken to recruit, retain, promote and develop women:

Measures	Yes=1/No=2
1. Options for flexible working conditions and/or locations	1. Y 2.N
2. Support programs and facilities to help reconcile work and family life	1. Y 2.N
3. Programs to encourage female networking, role models	1. Y 2.N
4. Gender quotas in hiring, retaining, promoting, developing women	1. Y 2.N
5. Requirement that each promotion pool includes at least 1 female candidate	1. Y 2.N
6. Others, please specify_____	1. Y 2.N

21. In your establishment, are there any obstacles to implementing gender diversity?
 1. Yes 2. No

21a. If yes, please select the top obstacle for implementing gender diversity in your establishment.

INTERVIEWER: PLEASE SHOW CARD 1

Barriers
1. Lack of skilled female workers
2. Lack of awareness or concern for gender diversity as a critical matter
3. Lack of target setting and implementation objectives for gender diversity initiatives (e.g. percentage of female leaders mentored)
4. A low level of commitment from the CEO and top management
5. Lack of resources dedicated to gender diversity initiatives (e.g. people, budget)
6. Limited knowledge about best practices to ensure gender diversity in my organization
7. Lack of transparency about the company's performance on gender diversity indicators
8. Lack of labor or social laws or regulations in my country that mandate gender diversity
9. Other. Please specify_____
10. Don't Know (-9) (<i>Spontaneous</i>)

22. Please evaluate the following statements regarding the future role of female workers in the tourism sector using the scale provided:

INTERVIEWER: PLEASE SHOW CARD 2

Statement	Strongly agree (1)	Some-what agree (2)	Neither agree nor disagree (3)	Some-what disagree (4)	Strongly disagree (5)	Don't Know (-9)
1. The use of women labor in the tourism sector is likely to increase over the next 10 years						
2. There is political pressure to increase the employment of women in the tourism sector						
3. The presence of female workers improves the quality of our overall workforce						
4. The company has a strategy to increase the number of female workers						
5. Women greatly improve the talent pool from which we can recruit						
6. Female workers are frequently better qualified than male workers available in the local community						
7. The tourism sector provides great employment opportunities for women						
8. Hotel companies need to plan their employment strategies for the future in the light of changing demographic structures within host communities						
9. Our customers prefer female workers						
10. Female workers create problems in the workforce						

23. Please rank the following elements of the business environment using the provided scale.

INTERVIEWER: PLEASE SHOW CARD 3

Elements of the business environment	Not an obstacle (0)	Minor obstacle (1)	Moderate obstacle (2)	Major obstacle (3)	Very severe obstacle (4)	Don't Know (-9)
1.-Access to finance						
2.-Access to land						
3.-Access to market						
4.-Business licensing and permits						

5.-Corruption							
6.-Crime, theft and disorder							
7.-Customs and trade regulations							
8.-Electricity							
9.-Inadequately educated workforce							
10.-Labor regulations							
11. Political instability							
12.-Practices of competitors in the informal sector							
13.-Tax administration							
14.-Tax rates							
15.-Transport							
16.-Other. Please specify _____							

D. THE EXPERIENCE OF FEMALE MANAGERS AND ENTREPRENEURS

24. In the tourism sector, do *female* entrepreneurs have a clear understanding of current laws and regulations related to operating their business?

1. Yes 2. No 3. I don't know (-9)

25. Please evaluate to what extent the following are obstacles to female-owned businesses in the tourism sector.

INTERVIEWER: PLEASE SHOW CARD 3

	Not an obstacle (0)	Minor obstacle (1)	Moderate obstacle (2)	Major obstacle (3)	Very severe obstacle (4)	Don't Know (-9)	N/A (-7)
1. Authorities don't have enough information about challenges faced by female entrepreneurs							
2. Limited access to legal and business development consultations for female entrepreneurs							
3. Women's low economic and social status							
4. Other please specify							

26. In the tourism sector, are men more likely than women to run large businesses (greater than 100 employees)?

1. Yes 2. No

26a. If yes, please identify the relevant reasons.

	YES=1/NO=2
1.Current regulations and laws do not consider and/or address challenges female entrepreneurs face when operating their own businesses	1. Yes 2. No
2.Agencies regulating SMEs prefer dealing with men due to cultural perceptions	1. Yes 2. No
3.Lack of specialized business education/training for women	1. Yes 2. No
4.Women-run businesses are not as equipped and/or staffed as the ones run by men	1. Yes 2. No
5.Limited opportunities available to female entrepreneurs (compared to the ones available to male)	1. Yes 2. No
6.Other (Specify)	1. Yes 2. No

27. Are you aware of any government initiated and supported programs that support female entrepreneurship in the tourism sector?

1. Yes 2. No

27a. If yes, have you participated in any of these government programs?

1. Yes 2. No

27b. If yes, were these programs successful?

1. Yes 2. No

28. Are you supportive of government policies to support gender equality in the tourism sector?

1. Yes 2. No

29. In your opinion, does the government treat male-owned and female-owned businesses the same?

1. Yes 2. No 3. I don't know (-9)

30. Are you aware of any cases where *female* entrepreneurs were subjected to forms of harassment besides being asked for informal payments by officials, in order to continue operating their businesses?

1. Yes 2. No

30a. If yes, do you know of any *female* entrepreneurs experiencing any of the following during a tax inspection?

	Yes (1)	No (2)	Don't know (-9)	Refuse to respond (-8)
1.Threats to shut down business				
2.Threats made to customers				
3.Shouting, scolding, making a nuisance in or near enterprise premises				
4.Vandalism of premises or merchandise				
5.Confiscation of property or merchandise				
6.Theft of property or merchandise				
7.Fondling or inappropriate touching				
8.Pushing or shoving				
9.Beating				
10. Any other kind of negative experience during a tax inspection'				

31. Are you aware of any cases where *male* entrepreneurs were subjected to forms of harassment besides being asked for informal payments by officials, in order to continue operating their businesses?

1. Yes 2. No

31a. If yes, Do you know of any *male* entrepreneurs experiencing any of the following during a tax inspection?

	Yes (1)	No (2)	Don't know (-9)	Refuse to respond (-8)
1.Threats to shut down business				
2.Threats made to customers				
3.Shouting, scolding, making a nuisance in or near enterprise premises				
4.Vandalism of premises or merchandise				
5.Confiscation of property or merchandise				
6.Theft of property or merchandise				
7.Fondling or inappropriate touching				
8.Pushing or shoving				
9.Beating				
10. Any other kind of negative experience during a tax inspection'				

32. For the following types of entrepreneurs, how would you rate the risk of being asked for sexual favors by officials in return for help with their business?

INTERVIEWER SHOW CARD 4

	Very high 5	High 4	Moderate 3	Low 2	Very low 1	DK =-9	REF =-8
1. Female entrepreneurs							
2. Male entrepreneurs							

E: DETAILS ABOUT THIS ESTABLISHMENT

INTERVIEWER: IF THE RESPONDENT IS UNABLE TO ANSWER SOME OF THE FOLLOWING QUESTIONS, PLEASE ASK HIM OR HER IF YOU CAN TAKE THE INFORMATION FROM THE ACCOUNTANT OR THE HR MANAGER

33. What is the average length of employment of male and female permanent employees?

- 1. Male employees: _____ Years
- 2. Female employees: _____ Years

INTERVIEWER: If LESS THAN 1 YEAR, CODE 1, DON'T KNOW=-9

34. What is the average length of employment of male and female temporary employees?

- 1. Male employees: _____ Months
- 2. Female employees: _____ Months

INTERVIEWER: If LESS THAN 1 MONTH, CODE 1, DON'T KNOW=-9

35. What was the number of male and female employees from the following countries at the end of 2016?

- 35a. Male employees from OECS countries: _____
Female employees OECS countries: _____
- 35b. Male employees from other countries: _____
Female employees from other countries: _____

36. How many employees did this hotel employ at these points in time? (Please include all employees and managers.)

Type of Employee	At the end of FY2016		Three Years Ago		At Time Hotel Started Operations
	Total	Female	Total	Female	
2. Permanent					
3. Temporary					
1. Total number					

37. Highest level of education of current employees by gender (as of today):

Highest educational level	Number of <i>male</i> employees	Number of <i>female</i> employees
1. University degree		
2. Vocational school		
3. High school graduates		
4. Less than a high school diploma		
5.Total number		

38. How many employees have been promoted to the following occupational levels in the last fiscal year?

Level of position	Male	Female
1. Management		
2. Supervisors		
3. Other staff		

39. Number of employees per occupational category and average monthly wages (gross):

Occupational Categories	Number of <i>male</i> employees	Average monthly salaries (LCU)	Number of <i>female</i> employees	Average monthly salaries (LCU)
1. Manager				
2. Department head/Supervisor				
3. Occupation workers (sales& marketing, accountants, human resources, etc.)				
4. Technical (chefs, engineers, electricians, masons, repair technicians, etc.)				
5. Front-line operational staff (housekeeping, food servers, drivers, etc.)				
6. Other. Please specify				
7.Total number of employees				

INTERVIEWER: IF DON'T KNOW =-9, IF REFUSE TO ANSWER=-8

INTERVIEWER PLEASE READ: I want to remind you that all the information given in this survey will be kept strictly confidential. Any information that is published will be in aggregate form and no information will be shared that can be linked to the respondent

40. For FY2016, please indicate the following information in local currency (LCU).

40a	From this establishment's Balance Sheet for last complete fiscal year, what was the net book value, that is the value of assets after depreciation, of the following:
------------	---

	LCU	DON'T KNOW (SPONTANEOUS)
1. Machinery, vehicles, and equipment		-9
Land and buildings		-9

40b	Hypothetically, if this establishment were to purchase the assets it uses now, in their current condition and regardless of whether the establishment owns them or not, how much would they cost, independently of whether they are owned, rented or leased?
------------	--

	LCU	DON'T KNOW (SPONTANEOUS)
Machinery, vehicles, and equipment		-9
Land and buildings		-9

40c. In 2016, what were this establishment's total operating costs?	
40d. In 2016, what were this establishment's total annual sales?	

40e. INTERVIEWER ANSWER: Were the monetary questions answered in XCD or USD?

1. XCD
2. USD

41. Are you planning to expand business operations in the coming years?

1. Yes
2. No

41a. Are you planning to use external financing for the expansion?

1. Yes
2. No
3. Don't Know (-9) (*Spontaneous*)

42. Could you please provide us with the name and address of the top 3 local suppliers of food and/or beverages that your hotel has used in the last two years?

Supplier 1: Name _____ Address _____ Phone # _____

Supplier 2: Name _____ Address _____ Phone # _____

Supplier 3: Name _____ Address _____ Phone # _____

INTERVIEWER, IF DON'T KNOW CODE= 9 , IF NOT APPLICABLE , CODE= -7

INTERVIEWER ANSWER THE REMAINING QUESTIONS YOURSELF BASED ON YOUR EXPERIENCE CONDUCTING THE SURVEY

43. Do you believe the answers given by the respondent are truthful?

1. Yes 2. No

44. Were the monetary and employee questions taken from the books or estimated by the employer?

1. Taken from books
2. Estimated by employer

INTERVIEWER PLEASE READ: THANK YOU VERY MUCH FOR YOUR TIME. THE DATA COLLECTED DURING THIS SURVEY WILL BE SUMMARIZED IN A FINAL REPORT DISSEMINATED BY THE WORLD BANK. IF YOU WISH TO RECEIVE THIS, COULD I PLEASE GET YOUR BUSINESS CARD SO THAT WE CAN EMAIL YOU THE RESULTS?

ANNEX 4: HOTEL EMPLOYEE QUESTIONNAIRE

Objective. This survey has the goal of evaluating impact of non-all-inclusive vs. all-inclusive tourism models on jobs for youth and women in the Organization of Eastern Caribbean States (OECS). The results of the survey will be analyzed to develop policy recommendations on improving gender equality in the tourism sector.

Confidentiality. The data collected through this questionnaire will be used in aggregated form and the information provided will be kept anonymous and strictly confidential.

A. GENERAL INFORMATION

Country

1. St. Lucia
2. Grenada

1. **Name of the hotel where you are now employed:** _____

2. **Your gender:** Male Female

3. **Your age group:**

1. 18-24 years
2. 25-30 years
3. 31-40 years
4. 41-50 years
5. Over 50 years

4. **Your nationality (please select all that apply if you have more than one nationalities):**

1. Grenadian
2. St. Lucian
3. Antiguan and Barbudan
4. Dominican
5. Kittitian and Nevisian
6. Vincentian
7. None of above. Please specify the country: _____

4a. **In what city do you live?** _____

5. **What is your highest level of education?**

INTERVIEWER: PLEASE SHOW CARD 1

1. Doctoral degree	
2. Master's degree	
3. Bachelor's degree	
4. Associate degree	
5. Some college, no degree	
6. Vocational school/Technical school	
7. High school graduate, no degree	
8. Less than a high school diploma	

B. WORKING EXPERIENCE

6. How long have you been working in the tourism and hospitality industry?
_____ Years (*IF LESS THAN 1 ROUND TO 1*)
7. How long have you been in your current job (years)? _____ Years
(*IF LESS THAN 1 ROUND TO 1*)
8. Is your current job your first job? 1. Yes 2. No
- 8a. If this is not your first job, was your first job in the hospitality sector? 1. Yes 2. No
9. In your opinion, is gender equality an important priority in the workplace in the tourism and hospitality industry?
1. Yes 2. No

INTERVIEWER IF RESPONDENT DOES NOT UNDERSTAND GENDER EQUALITY, READ:
“Gender equality is central to the World Bank Group’s goals of ending extreme poverty and boosting shared prosperity in a sustainable manner. No society can develop sustainably without transforming the distribution of opportunities, resources and choices for males and females so that they have equal power to shape their own lives and contribute to their families, communities, and countries.”

C. CURRENT JOB PROFILE

10. Which department are you currently working for?

INTERVIEWER: PLEASE SHOW CARD 2

1. Finance and accounting	
2. Sales and marketing	
3. Human resources	
4. Front office	
5. House keeping	
6 Food and beverage	
7. Facilities and maintenance	
8. Other. Please specify_____	

11. What category best describes your job?

INTERVIEWER: PLEASE SHOW CARD 3.

1. Manager	
2. Department head	
3. Supervisor	
4. Technical (chefs, engineers, etc.)	
5. Front-line operational staff (housekeeping, food servers, etc.)	
6. Administrative support	
7. Other. Please specify_____	

D. WORKING CONDITIONS

12. Does your hotel provide you with the transportation for getting to and from work?

1. Yes
2. No

12a. Are you satisfied with the transportation options offered?

1. Very satisfied
2. Somewhat satisfied
3. Neither satisfied nor dissatisfied
4. Somewhat dissatisfied
5. Very dissatisfied

13. How many night shifts, on average, did you work in a typical month in 2016?

14. How many hours did you work, on average, in a typical week in 2016?

_____ hours

15. Are you satisfied with your working schedules?

1. Very satisfied
2. Somewhat satisfied
3. Neither satisfied nor dissatisfied
4. Somewhat dissatisfied
5. Very dissatisfied

16. How often do you have to work overtime?

1. Extremely often
2. Very often
3. Moderately often
4. Slightly often
5. Rarely

17. How are you compensated for overtime work?

1. Payment
2. Benefits
3. Both
4. Not at all
5. N/A (*Spontaneous*)

18. How flexible is it for you to take paid leave days (i.e. paid vacations, paid holidays, etc.) at your hotel?

1. Very flexible
2. Somewhat flexible
3. Neither
4. Somewhat inflexible
5. Very inflexible

18a. How much advance notice is required to take paid leave days? _____ weeks.

19. In a typical work week, what is your level of stress at work?

- 1. No stress
- 2. Low stress
- 3. Moderate stress
- 4. High stress
- 5. Severe stress

19a. In a typical work week, how many days do you feel stressed at work? _____

20. Have you been injured physically at work in your current job?

- 1. Yes
- 2. No

21. Based on your experience at your current job, please indicate if you have ever observed or experienced any of the following at work?

	Observed	Experienced
1.Threats	Y/N/Refuse	Y/N/Refuse
2.Shouting or scolding	Y/N/Refuse	Y/N/Refuse
3.Pushing or shoving	Y/N/Refuse	Y/N/Refuse
4.Racial discrimination	Y/N/Refuse	Y/N/Refuse
5.Gender discrimination	Y/N/Refuse	Y/N/Refuse
6.Sexual harassment	Y/N/Refuse	Y/N/Refuse

E. SALARY AND BENEFITSs

22. What is your monthly base salary (excluding tips, service charges and benefits) in LCU?

Low season _____

High season _____

INTERVIEWER: DON'T KNOW =-9, REFUSE = -8

23. In addition to your base salary, do you receive the following?

	Yes	No	If yes, amount in local currency
1.Tips			
2.Service charges			
3. Gratuity			
4. Commission			

24. How satisfied are you with your overall compensation?

1. Very satisfied
2. Somewhat satisfied
3. Neither satisfied nor dissatisfied
4. Somewhat dissatisfied
5. Very dissatisfied

25. In your opinion, are there any wage gaps in the base salaries of *female* employees and *male* employees doing the same job at your hotel?

1. Yes 2. No 3. I don't know (-9)

26. Did you ask for an increase in your compensation in the past 2 years?

1. Yes 2. No

26a. If yes, did you receive an increase in your compensation?

1. Yes 2. No

27. Please indicate your level of agreement with following statements regarding your salary:

INTERVIEWER: PLEASE SHOW CARD 4.

	Strongly agree	Somewhat agree	Neither agree or disagree	Somewhat disagree	Strongly disagree	N/A
	1	2	3	4	5	6
1.The pay offered by this hotel is competitive as compared to my previous jobs						
2.This is my first job , the pay offered by this hotel is competitive to as compared to other hotels						
3.My wage of my base salary matches my job performance						
4.The pay policy of this hotel helps attract and retain high performing employees						

28. Please select benefits offered by your hotel.

Benefits	
1. Free or subsidized housing	1. Yes 2. No
2. Free or subsidized meals	1. Yes 2. No
3. Free or subsidized transport	1. Yes 2. No
4. Free or subsidized child care	1. Yes 2. No
5. Unsubsidized child care	1. Yes 2. No
6. Weekly time off	1. Yes 2. No
7. Options for flexible working hours	1. Yes 2. No
8. Support programs and facilities to help reconcile work and family life (lactation rooms, child play areas, etc.)	1. Yes 2. No
9. Other, please specify _____	1. Yes 2. No

28a. if your hotel offers free or subsidized housing, do you live there?

1. Yes 2. No

28b. if your hotel offers free or subsidized childcare, do you use it?

1. Yes 2. No 3. N/A

28c. If NO, were any of the following among the reasons to not use it?

1. Distance to workplace
2. Night shifts
3. Other, please specify _____

29. Please indicate your level of agreement with the following statements regarding your benefits (i.e. health care, pension, etc.):

INTERVIEWER: PLEASE SHOW CARD 4.

	Strongly agree	Somewhat agree	Neither agree or disagree	Somewhat disagree	Strongly disagree	N/A
	1	2	3	4	5	6
1. The hotel offers a comprehensive benefits package						
2. The hotel offers better benefits than other places I have worked						
3. The benefits I receive provide security for me and my immediate family						
4. Overall, I am satisfied with my benefits						

30. Does your hotel provide other types of rewards in addition to service charges, tips and benefits?

1. Yes. Please specify _____
2. No

30a. If yes, in your opinion, are the rewards provided fairly regardless of gender?

1. Yes
2. No

31. Do you have an additional source of income, besides your work at the hotel?

1. Yes
2. No

31a. If yes, what is your additional source of income?

1. Self-employment
2. Work in the agriculture sector
3. Other, please specify _____

31b. If yes, what share of your total income comes from your work at the hotel? _____%

F. SKILLS DEVELOPMENT AND CAREER DEVELOPMENT

32. Did your hotel offer training programs in 2016?

1. Yes.
2. No

32a. If yes, how many training programs were offered at your department in 2016? # _____

33. Did you receive any trainings in 2016?

1. Yes.
2. No.

33a. If you did not participate in trainings, please explain why not

1. Did not need the training provided
2. Did not have time to participate
3. Did not qualify for the training
4. Other, please explain: _____

34. If you did participate in trainings, how many hours of training, overall, have you done at this hotel in the last 2 years? _____ hours

35. Please indicate your level of agreement with following statements regarding the skills development in your current job:

INTERVIEWER: PLEASE SHOW CARD 5

	Strongly agree 1	Somewhat agree 2	Neither agree or disagree 3	Somewhat disagree 4	Strongly disagree 5
1. Overall the training provided meet my learning needs.					
2. My knowledge/skills have increased as a result of the training programs.					
3. The knowledge/skills gained through the training provided are directly applicable in my work.					
4. The training programs will improve my job performance.					
5. The training programs is helpful to my career development beyond my current job.					
6. I am supported by my supervisor to apply what I have learned.					

36. Did you ask for a promotion in the last 2 years?

1. Yes 2. No

36a. If yes, did you receive the promotion you asked for?

1. Yes 2. No

37. How many times have you been promoted in your current job? _____

38. In your opinion, does your gender make it harder for you to get a raise, promotion, or chance to get ahead?

1. Yes 2. No 3. I don't know (-9)

39. Do you think the best opportunities go to the most deserving employees regardless of the gender?

1. Yes 2. No

G. JOB SATISFACTION

40. Please indicate your level of agreement with following statements regarding clarity of your job responsibilities:

INTERVIEWER: PLEASE SHOW CARD 5

	Strongly agree 1	Somewhat agree 2	Neither agree or disagree 3	Somewhat disagree 4	Strongly disagree 5
1.The duties and objectives of my job are clear.					
2.Expectations for my job are clearly communicated.					
3.Rules for the same job are applied consistently and fairly among all staff					
4.I have enough information to do my job well					

41. Please indicate your level of agreement with following statements regarding your relationship with your supervisor:

INTERVIEWER: PLEASE SHOW CARD 5

	Strongly agree 1	Somewhat agree 2	Neither agree or disagree 3	Somewhat disagree 4	Strongly disagree 5
1.My supervisor communicates well with subordinates					
2.I am valued by my supervisor					
3. Supervisors demonstrate a commitment to enabling staff to grow professionally					
4.Supervisors encourage staff to be innovative and come up with better ways of doing things					
5.Overall, I have a good relationship with my supervisor					

42. Please indicate your level of agreement with following statements regarding your overall job satisfaction:

INTERVIEWER: PLEASE SHOW CARD 5

	Strongly agree 1	Somewhat agree 2	Neither agree or disagree 3	Somewhat disagree 4	Strongly disagree 5
1. My work gives me a feeling of personal accomplishment					
2. I experience personal growth such as improving skills and learning different jobs					
3. I feel rewarded for the quality of my efforts					
4. I have a clear path for career advancement					
5. I am satisfied with my job.					

H. Job Security

43. What is the type of your contract:

1. Full time, open-ended
2. Full time, term (more than 3 years)
3. Full time, term (1-3 years)
4. Part time
5. Temporary/Seasonal
6. Other, please explain: _____

44. Are you concerned that you will be laid off during the low season?

1. Yes
2. No

45. Have you been asked to take unpaid vacation during the low season?

1. Yes
2. No

45a. If yes, how much was your monthly income reduced during this period (%)? ____%

46. Do you know of any associations to promote workers' rights?

1. Yes
2. No

46a. If yes, are you a member of any of these associations?

1. Yes
2. No

46b. What types of activities do these associations undertake?

47. How likely are you to look for a different job outside your current job?

1. Extremely likely
2. Very likely
3. Moderately likely
4. Slightly likely
5. Not at all likely

I. FUTURE CAREER

48. Are you considering working in other industries than tourism?

1. Yes
2. No

49. Has your image of careers in the tourism and hospitality industry changed since you first became involved in the industry?

1. Yes
2. No

50. If you answered YES to the previous question, please explain how it has changed and why.

51. Overall, are you proud of working in the tourism and hospitality industry?

1. Yes
2. No

52. Over the longer term, would you like to pursue a career in the tourism and hospitality industry?

1. Yes
2. No

53. Based on your experience, would you recommend careers in the tourism and hospitality industry to your friends?

1. Yes
2. No

54. What is your full name? _____

55. What is the title of your position at the hotel? _____

INTERVIEWER: PLEASE ANSWER THE REMAINING QUESTIONS YOURSELF, BASED ON YOUR EXPERIENCE CONDUCTING THE SURVEY

56. Did you interview the employee selected during the screening process or did you to select the employee on site?

1. Selected during screening
2. Selected on site

56a. If selected on site, how was the employee selected for the interview?

1. Selected randomly
2. Suggested by the management

57. Do you believe the answers given by the respondent are truthful?

1. Yes
2. No

ANNEX 5: AGRICULTURAL ESTABLISHMENT QUESTIONNAIRE

Objective. This survey has the goal of evaluating impact of non-all-inclusive vs. all-inclusive tourism models on jobs for youth and women in the Organization of Eastern Caribbean States (OECS) countries and the linkages between agriculture and tourism. The results of the survey will be analyzed to develop policy recommendations on improving gender equality in the tourism and agribusiness sectors.

Confidentiality. The data collected through this questionnaire will be used in aggregated form and the information provided will be kept anonymous and strictly confidential.

A. GENERAL INFORMATION

1. **Your gender:** : 1. Male 2. Female
2. **What is the name of the establishment**

3. **What is the establishment's primary business activity?**

4. **As part of its regular operations, is the establishment involved in any of the following activities:** (Select all that apply)
 1. Farming
 2. Harvesting
 3. Processing
 4. Packaging
 5. Selling/reselling
 6. Transporting
 7. Other (please specify) _____
5. **Location of the establishment:**
 1. Country: _____
 2. Province _____
 3. City/town/village _____
6. **What month does this establishment's fiscal year begin?**
_____ Start Month-End Month
7. **Is this farm or establishment part of a larger farm or establishment?**
 1. Yes, number of business establishments that form the farm or establishment _____
 2. No, a farm or establishment on its own
8. **What is your role at this establishment?**
INTERVIEWER: IF RESPONDENT IS BOTH OWNER AND MANAGER, SELECT OWNER
 1. Owner. If yes, share of ownership (%) _____
 2. Manager
 3. Other, please specify: _____

9. Legal structure of the farm or establishment?

1. Family-owned farm/ sole proprietorship
2. Partnership
3. Limited liability private corporation
4. State-owned enterprise
5. Communal ownership
6. OTHER _____ (please specify)
7. Don't Know (-9)

10. What percentage of this establishment is owned by each of the following:

Response Options	%	DK
6. Private individuals, companies or organizations from <u>Country</u>		
7. Private individuals, companies or organizations from other Caribbean countries		
8. Private individuals, companies or organizations from countries outside Caribbean		
9. Government or State		
10. Other		
Total	100%	

11. Amongst the owners of the farm or establishment, are there any females?

1. Yes, percent ownership _____ %
2. No
3. Don't Know (-9)

12. Does the farm or establishment belong to a cooperative organization, association, or producer group?

1. Yes, with membership of # _____ individuals/ farms/ establishments
2. No
3. Don't Know (-9)

13. In what year did this establishment begin operations in Country

Year establishment began operations _____

INTERVIEWER, IF DON'T KNOW, CODE=-9

14. Is this establishment formally registered?

1. Yes. If yes, please specify the year when it was registered? Year: _____
2. No
3. Don't Know (-9)

15. What were this establishment's total annual sales for ALL products and services in the following years?

Fiscal Year	Total Annual Sales for ALL Products and Services (LCU)
2014-2015	
2015-2016	

B. BUSINESS LINKAGES TO TOURISM AND HOSPITALITY INDUSTRY

16. What percentage of your establishment total sales in the last Fiscal Year were to :

- 1. All-inclusive hotels\ resorts _____ and how many all-inclusive hotel/resorts do you supply to _____ (# of hotels)
- 2. Non all-inclusive hotels and resorts _____ and how many non-all-inclusive hotel/resorts do you supply to _____ (# of hotels)
- 3. Hotels that provide both tourism models _____ and how many hotels that provide both tourism models do you supply to _____ (# of hotels)

17. In selling to these hotels, does this establishment process, package and sell or resell agricultural products that are not grown or harvested by this establishment?

- 1. Yes
- 2. No

17a. If yes, how many entities does this establishment procure agriculture products from? _____

17b. If yes, what percentage of the products sold to the hotels were grown or harvested by this establishment? _____ %

18. Please indicate the major product categories that your establishment supplies to hotels

- 1. Dairy and dairy products
- 2. Fish
- 3. Fruits
- 4. Vegetables
- 5. Herbs
- 6. Cereal Crops
- 7. Others, please specify _____

19. Please rank the top two most important factors for being selected as a supplier?

INTERVIEWER PLEASE SHOW CARD 1

Factors	Top Factor	Second Factor
1. Price		
2. Adequate product quality		
3. Production capacity		
4. Access to quality inputs		
5. Timely delivery		
6. Suitable technology		
7. Standards requirements, (health, safety and environmental standards)		
8. Management practices		
9. Other, please specify		

20. Please list the top 5 client hotels in the last FISCAL YEAR.

1. Name: _____
2. Name: _____
3. Name: _____
4. Name: _____
5. Name: _____

FOR EACH CLIENT IDENTIFIED the FOLLOWING QUESTIONS APPLY

21. For how many years has your establishment supplied to Hotel 1, 2, 3, 4, or 5?

INTERVIEWER, IF LESS THAN 1 YEAR, CODE=1

22. What kind of contract do you have with Hotel 1, 2, 3, 4, or 5

1. No formal contract / verbal contract
2. Contract is signed for each sale individually
3. Term contract

3a. If term, what is the length of the term contract?

1. Less than a year
2. 1-3 years
3. More than 3 years
4. Don't Know (-9)

23. Do you expect to continue supplying to Hotel 1, 2, 3, 4, or 5 for the next five years?

1. Yes

23a. If yes, do you expect your shares of supplies to Hotel 1, 2, 3, 4, or 5 to:

1. Increase
 2. Decrease
 3. Stay about the same
2. No

24. Typically in doing business with Hotel 1, 2, 3, 4, or 5, do you receive payments in a timely manner?

1. Yes
2. No

2a. If no, what is the typical duration of the delay?

1. Less than 1 month
2. 1-3 months
3. More than 3 months

25. Typically what mode of payment does Hotel 1, 2, 3, 4, or 5 use to reimburse you for your products/ services?

1. Cash
2. Check
3. Credit
4. Electronic funds transfer
5. Other _____

26. Overall what is your level of satisfaction based on your relationship with Hotel 1, 2, 3, 4, or 5?

1. Very satisfied
2. Somewhat satisfied
3. Neither satisfied nor dissatisfied
4. Somewhat dissatisfied
5. Very dissatisfied

C. WORKFORCE

INTERVIEWER PLEASE READ:

“Permanent employees are defined as all paid employees that are contracted for a term of one or more fiscal years and/or have a guaranteed renewal of their employment contract.

Temporary (seasonal) workers are all paid short-term (i.e. for less than a year) employees with no guarantee of renewal of contract employment.”

27. How many years of experience in the sector does the Top Manager have?

_____ years

INTERVIEWER, IF DON'T KNOW, CODE=-9

28. How many years has the Top Manager worked in this farm or establishment?

_____ years

INTERVIEWER, IF DON'T KNOW, CODE=-9

29. Is the Top Manager female?

1. Yes
2. No
3. Don't Know (-9)

30. What is the Top manager's highest level of education?

INTERVIEWER: PLEASE SHOW CARD 2.

1. Doctoral degree	
2. Master's degree	
3. Bachelor's degree	
4. Associate degree	
5. Some college, no degree	
6. Vocational school/Technical school	
7. High school graduate, no degree	
8. Less than a high school diploma	

31. What is the average length of employment of all permanent employees currently?

1. Male Employees: _____ years

2. Female Employees: _____ years

INTERVIEWER, IF LESS THAN 1 YEAR, CODE=1, DON'T KNOW =-9

32. What was the average length of employment of all temporary/ seasonal workers in the last fiscal year?

1. Male Employees: _____ months
2. Female Employees: _____ months

INTERVIEWER, LENGTH OF EMPLOYMENT SHOULD BE 12 MONTHS OR LESS. IF LESS THAN 1 MONTH CODE=1, DON'T KNOW =-9

33. How many of the temporary employees \ seasonal workers hired in the LAST FISCAL YEAR were previously employed in the tourism sector? _____

Number of employees

INTERVIEWER, IF DON'T KNOW CODE =-9

34. Based on your experience, do you think there are any advantages to employing women rather than men?

1. Yes, there are some advantages
2. No, there are no advantages
3. Don't know (-9)

34a. Please explain your answer: _____

35. Are there any advantages to employing younger employees (24 or younger), rather than older (25 years and older)?

1. Yes, there are some advantages
2. No, there are no advantages
3. Don't know (-9)

35a. Please explain your answer: _____

36. Does this establishment offer special support for female employees (e.g. child care, transport, skills training, etc.)

1. Yes
2. No

q36a. If yes, what special support is offered? _____

37. How many individuals working on your farm or establishment have the following education and experience:

Highest educational level	Number of <i>male</i> employees	Number of <i>female</i> employees
1. University degree		
2. Vocational school		
3. High school graduates		
4. Less than a high school diploma		
5. Total number of employees		

38. For the following group of individuals working in the farm or establishment, please indicate the TYPICAL daily WAGES for the last fiscal year.

	Permanent Employees	Temporary/ Seasonal Workers
Total	Age 18-24 years 25+ years PERMANENT workers	Age 18-24 years 25+ years TEMPORARY workers
Female employees	Age 18-24 years 25+ years PERMANENT FEMALE workers	Age 18-24 years 25+ years TEMPORARY FEMALE workers
Family Members	Age 18-24 years 25+ years PERMANENT FAMILY MEMBER workers	Age 18-24 years 25+ years TEMPORARY FAMILY MEMBER workers

D. BUSINESS GROWTH

39. Please rank the following elements of the business environment using the provided scale.

INTERVIEWER PLEASE SHOW CARD 3

Elements of the business environment	Not an obstacle (0)	Minor obstacle (1)	Moderate obstacle (2)	Major obstacle (3)	Very severe obstacle (4)	Don't Know (-9)
1.-Access to finance						
2.-Access to land						
3.-Access to market						
4.-Business licensing and permits						
5.-Corruption						
6.-Crime, theft and disorder						
7.-Customs and trade regulations						
8.-Electricity						
9.-Inadequately educated workforce						
10.-Labor regulations						
11. Political instability						
12.-Practices of competitors in the informal sector						
13.-Tax administration						
14.-Tax rates						
15.-Transport						
16.-Others. Please specify _____						

40. Are you planning to expand business operations in the coming years?

1. Yes
2. No
3. Don't Know (-9)

41. Have you received any training related to your agricultural business?

1. Yes
2. No

41a. If yes, what type of training did you receive?

1. Formal EXTERNAL training, i.e. training at a school, university, etc.
2. Formal INTERNAL training, i.e. training at the establishment
3. Informal on-the-job training

42. If the farm was awarded a 3-year contract for PURCHASE OF ITS PRODUCTS that meant output would double from its current level, how many additional permanent formally trained occupation workers and how many permanent general workers would the establishment hire?

1. formally trained workers (managers, agricultural specialist, marketing persons, accountants, etc.) _____
2. general workers (farm workers, clerical workers, drivers, packers, etc.) _____

Thank You for Your Participation

ANNEX 6: SURVEY METHODOLOGY AND IMPLEMENTATION

1. INTRODUCTION

This report describes the design and implementation of the Tourism, Gender and Competitiveness Surveys in Saint Lucia and Grenada. The surveys were carried out by A2F Consulting through its local partner, Accela Marketing.

The Tourism, Gender and Competitiveness survey is a World Bank study to evaluate the impact of the non-all-inclusive versus all-inclusive tourism models on youth and female employment and potential spillover effects to associate sectors, such as agriculture, in two pilot countries: St. Lucia and Grenada.

The data collection aims to address the specific requirements of the grant and in particular to shed more light on the following issues:

- i. constraints to more and better jobs (e.g., addressing the provision of services for child and elder care, reducing occupational segregation, increasing the productivity of informal employment, among other issues); and
- ii. barriers to female entrepreneurs and control over assets (land, housing, finance or technology)

The study is designed to gather data to provide year-to-year, cross-country business environment measures and build a baseline for a panel data set. The panel data set will allow researchers to track changes in the business environment, to measure the effect of these changes on firm performance over time and to assess the effects of reforms on the business environment in the tourism sector

In addition to gathering data from hotels, the study involves case studies implemented with enterprises from the agriculture sector to get insights on labor dynamics and displacement between the tourism (hotels) and agriculture sectors and the associated effects on benefits, and compensation.

2. SAMPLING

2.1 Overview of Sampling

The survey universe for the Tourism, Gender and Competitiveness Surveys included hotels and resorts located on the main islands of Saint Lucia and Grenada. The sampling frame was built by combining information from a variety of sources. An initial list of hotels was provided by The Grenada Tourism Authority and the Saint Lucia Hotel and Tourism Authority for each respective island. The team then used additional online sources including travel websites like Expedia and Hotels.com to expand the lists provided. The local survey company, Accela Marketing, used local knowledge of the hotel sector to fill in any gaps to complete the sampling frame. The total sampling universe included 142 hotels in Saint Lucia and 76 hotels in Grenada. The survey methodology was peer reviewed during the study development (January to June 2018).

Sample size. The targeted sample size was designed based on the adapted for smaller economies Enterprise Surveys methodology (margin of error of 8% and 90% confidence interval). The study represents the largest (based on sample size) single sector (tourism specific) survey that the Bank has ever implemented in the region. (Typically, nationally representative surveys covering all sectors in OECS have 150 respondents (the current study covers 98 employers and 192 employees).

Farmers' module: The farmers module was included to look for potential differences in treatment and selection based on the tourism model. We enumerated the farmers universe (the

subset working with hotels) by asking each hotel to present a list of agribusinesses they have worked with and have drawn the farmers sample from there. The limitation of this approach is that the frame is skewed towards farmers already providing services to hotels.

Table 19: Sample Breakdown by District and Hotel Size*

Grenada					
District	Large	Medium	Small	Unknown	Total
St. George's	8	19	9	0	36
other Grenada	0	3	6	0	9
Total	8	22	15	0	45

Saint Lucia					
District	Large	Medium	Small	Unknown	Total
Castries	5	9	17	0	25
Gros Islet	9	11	11	1	38
Soufriere	2	4	6	0	12
Vieux - Fort	1	2	2	0	5
other St. Lucia	1	2	4	1	8
Total	18	28	40	2	88

*Note. Sample was not stratified by size, the breakdown is for illustration purposes only

2.2 Sampling of Respondents

Within each hotel, one manager or owner was interviewed and, at the minimum, one male and one female employee were interviewed. To select the employees at establishments with more than one male and one female employee, efforts were made to randomly select employees for interviewing. During the administration of the screener questionnaire, the owner or manager was informed of the upcoming interview and told that at least 2 employees would be needed for interview on that day. If agreeable to the owner/manager, the enumerator would then ask to randomly select the respondents by randomly selecting a specific letter of the alphabet and asking for employees with first names starting that letter. In this way, we minimized selection bias by selecting employees through a randomized process, rather than interviewing an employee selected by the manager or owner.

2.3 Sampling of Agricultural Establishments

The sampling frame of agricultural establishments was built by combining several different sources, including:

1. During the screener questionnaire and again during the interviews, we asked hotel managers for a list of their food and beverage suppliers
2. We procured a list of suppliers from the Saint Lucia Hotel and Tourism Authority, which has a program to link farmers with hotels
3. When interviewing farmers and agricultural establishments, we asked for additional references of those who supplied to hotels

This provided us with a list of 31 agricultural establishments in Saint Lucia and 34 agricultural establishments in Grenada. All agricultural establishments were thus contacted and requested to participate in the survey.

3. SURVEY INSTRUMENTS

3.1 Overview of Questionnaires

The Tourism, Gender and Competitiveness survey was carried out via two modules (1) interviews with managers/owners of hotels (2) interviews with employees of hotels. For each module, a separate questionnaire was used. The questionnaires were developed and interviews conducted in English, so not translation was required. The questionnaires were designed by the World Bank and reviewed internally and subsequently finalized through a collaborative review process between A2F and the World Bank.

The survey instrument was designed as a useful tool that could be deployed in the future to perform follow-up and comparative analysis in the same participant countries, as well as by many other countries interested in better understanding the employment dynamics with a gender perspective. Some of the major topics covered include:

- How effective are the two tourism models (all-inclusive vs. non all inclusive) in delivering inclusive jobs and earnings, particularly to target groups (women)?
- What type of factors play a role around firm decisions to employ capital and labor, to develop the workforce, and to source inputs (including skill development needs)? How does gender affect these factors?
- Is there any gender differentiation on the occupation/roles, remuneration, skills-profile, ownership, entrepreneurship and participation within different tourism models?
- What is the optimum development path to deliver sustainable, quality jobs and income growth under different tourism models (particularly for enterprises run by female entrepreneurs)?
- What type of policies/interventions can ease constraints to deliver quality jobs and lead to the above mentioned optimum development path?
- For tourism related and non-related firms, what is the workforce profile, their educational attainment, occupational composition, wages, and benefits?

3.2 Hotel Manager/Owner Questionnaire

The managers module was designed to seek opinions and information from the establishment's senior manager, owner, accountant, and/or human resource manager. Several questions are designed to solicit managers' opinions on different aspects of the business environment. Other portions of the questionnaire solicit a few basic data points that are to be taken from the establishment's financial statements. The final questionnaire included as Annex 1 contains the following sections:

- A. General Information
- B. About Your Employees
- C. Corporate Policy on Promoting Gender Equality
- D. The Experience of Female Managers and Entrepreneurs
- E. Details about this Establishment

3.3 Hotel Employee Questionnaire

The employee module was designed to target specific issues related to hiring/ firing, compensation by gender, jobs opportunities and career growth as well as access to benefits and harassment on the job. The objective of the hotel employee questionnaire is to gather information to understand the situation and perspectives of male and female employees with regard to their work experience in the hospitality sector. This module contains both quantitative questions aimed at understanding the situation of male and female employees and any gaps between them and qualitative questions to understand their particular perspectives and experiences. The final questionnaire included as Annex 2 contains the following sections:

- A. General Information
- B. Working Experience

- C. Current Job Profile
- D. Working Conditions
- E. Salary and Benefits
- F. Skills Development and Career Development
- G. Job Satisfaction
- H. Job Security
- I. Future Career

3.4 Screener Questionnaire

In addition to the questionnaires used to carry out interviews, a screener questionnaire was used to determine if establishments were eligible to be included in the survey. The Screener was designed to be implemented over the phone. The Screener contained essential information from which to make determinations about what cases justify substitutions of one establishment in the sample for another, and also collected indispensable information to make adjustments in the projections when the sampling frame is faulty. The questions included in the screener questionnaire included address of the hotel, number of rooms, number of employees, and whether the hotel offered all-inclusive or not.

3.5 Agricultural Establishment Questionnaire

For carrying out the case studies with agricultural establishments, a questionnaire was designed for conducting face-to-face interviews. The agriculture questionnaire delves into the linkages between the tourism and the agriculture sectors in terms of income and labor. The final questionnaire included as Annex 3 contains the following sections:

- A. General Information
- B. Business Linkages to Tourism and Hospitality Industry
- C. Workforce
- D. Business Growth

3.6 Show Cards

Show cards were used to help with issues associated with recall. For multiple choice questions containing more than 5 possible responses or questions that asked respondents to rate responses along a scale, printed show cards with the potential answers were provided to the respondent so that the respondent could read the answers and easily choose his or her response. The advantage of the show cards was to allow the respondent to have each response in front of him or her and not have to remember each of the responses listed by the enumerator. For multiple choice questions with many possible responses, the options were randomized and several different show cards were presented to different respondents to reduce bias based on ordering of responses.

3.7 Digital Questionnaires

The primary development of the questionnaire was done on paper. A2F then scripted the paper versions of the questionnaires for uploading onto the CAPI platform, by describing the proper coding for each question and responses and the proper logic and skip patterns. Where clearly relevant, the CAPI program specified numerical ranges to ensure answers were sensible. Logic checks were also scripted to check answers that were not feasible, e.g. if an enumerator coded that the respondent had been working in the hotel for longer than he/she had been working in the tourism sector. The CAPI software used was KeySurvey, a leading provider of electronic data collection solutions, including offline data collection through their mobile application. The survey was thus carried out via the digital questionnaire on tablets.

4. FIELDWORK

4.1 Field Team & Training

The local partner, Accela Marketing, was responsible for selection of supervisors and enumerators. Potential field staff were interviewed and screened in one on one sessions. For each island, 5 enumerators were selected based on their level of experience, proficiency with reading and responding to interview questions and education. All enumerators had a minimum college level education and previous experience conducting interviews for surveys.

Training of supervisors and enumerators was conducted over a 5-day period between July 10-14, 2017. The training was conducted by the A2F team, including Mr. Alex Proaño and Ms. Kate Ivey, and the World Bank Task Team Leader, Mr. Veselin Kuntchev. Training took place at the Accela Marketing Office in Saint Lucia and at the Siesta Hotel in Grenada. In addition to theoretical topics, the training was practical in nature, allowing enumerators to practice reading questions out loud and using the tablets for filling out questionnaires. The interviewers received instructions with a detailed explanation of their duties, responsibilities and the rules for conducting the survey. Each of the questionnaire modules was discussed in detail. Special attention was paid to the quality requirements of the interviews. The interviewers were reminded of the general rules of conducting face-to-face interviews, including the neutral behavior of interviewer, methods of soliciting participation, and precise reading of the question phrasings. Training covered such aspects as:

Figure 6: Training Modules

General Background	<ul style="list-style-type: none">• Understanding of the project and its goals, including indicators & composite index• Overview of methods and ethics of market research• Introduction to study design, methodology and sample
Survey Skills	<ul style="list-style-type: none">• Special communication skills required for interviews• Importance of following instructions, skip patterns and completing interviews, controlling an interview & establishing and maintaining confidentiality• Role playing and interview techniques
Survey Logistics	<ul style="list-style-type: none">• Field supervision, role of supervisors & management of survey process• Monitoring progress, performance & problems and controlling data quality• Coding and verifying data, testing and review
Use of CAPI	<ul style="list-style-type: none">• Using the survey app• Filling out questionnaires• Saving/submitted questionnaires & returning to edit questionnaires• Re-entering app if logged out

During the training, enumerators received:

1. Questionnaires on paper & any support materials (including show cards)
2. Tablets for conducting interviews
3. Interviewer instructions
4. Contact information of supervisors from Accela and A2F

4.2 Pilot & Roll-Out

After training on each island, the enumerators and supervisors participated in a pilot period, conducting interviews with managers and employees from selected hotels. Pilot interviews were completed with 3% of the total sample. After completion of the training and pilot the interviewers' recommendations and critical comments concerning the lists of response options, and the understanding and sensitivity of some questions were collected and discussed. The phrasings of some questions were subsequently revised and improved. Interviewers and supervisors refined their professional skills during the pilot. Based on the results from the pilot, the team updated the survey instruments for final approval by the World Bank.

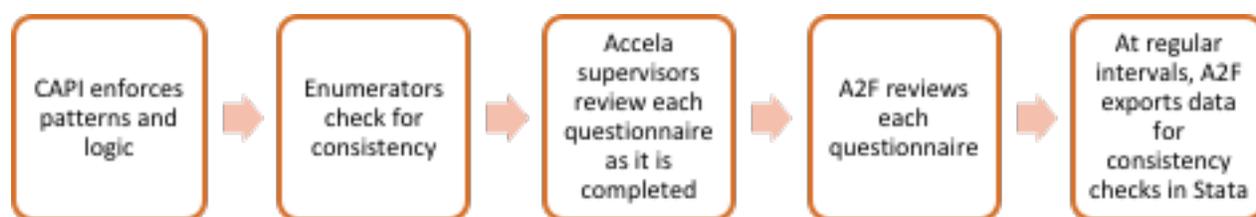
Roll-out of the data collection process took place between August – November, 2017. Once an establishment has been randomly chosen to participate in the survey and contact with the establishment is made the Screener was applied to verify and complete information contained in the sampling frame. The Screener was also used to ask establishments to participate in the survey. For those who agreed, an appointment date and time were set up. For those who refused, the screener gathered useful information about the characteristics of these establishments.

The interview process followed a face-to-face method. The interviews took place at the respondents' place of employment, that is, in the selected hotel. The enumerators visited the hotels and conducted interviews with one manager or owner and, where possible, one male employee and one female employee. For a small portion of hotels, there were not one of each employee. The hotels with zero employees were small guesthouses and self-catering apartments that were managed solely by the owner and his or her spouse. For hotels with only female employees, but no male employees, two female employees were interviewed and vice versa for hotels with only male employees.

5. QUALITY CONTROL

Quality control to ensure high quality data was conducted at multiple levels throughout the data collection process. The first data quality checks are done by the CAPI system, which prohibits out of range responses. The enumerators also conducted a check to see that all questions were answered and all responses made sense. Upon completion of an interview, the enumerator would submit it into the KeySurvey system. As each interview was submitted, a supervisor from Accela would review and make note of any issues before marking as complete. A2F would then review and inform Accela of any inconsistencies or missing data discovered. The supervisor from Accela would then call back the respondent to obtain any missing data and clarify any inconsistencies to verify that data was as complete and accurate as possible. At intervals of 10%, 25%, 50% and 100%, A2F exported the data from KeySurvey to Stata for consistency checks. The quality control followed the process as shown below:

Figure 7: Process Followed for Data Quality Control



A key element of the controlling was a systematic monitoring of the enumerators duties. Supervisors from Accela had to regularly inform A2F about the progress of enumerators' work, including a report on the number of completed interviews and notification about emerging difficulties and accepted decisions. The controlling responsibilities of the supervisors included inspection of the submitted questionnaires, telephone control and follow-up of the respondents. Supervisors were responsible for making phone calls to the hotels where data was inconsistent to verify information. In addition, A2F conducted call backs with 10% of respondents to ensure that interviews had taken place and information gathered was accurate. Overall 15% of the interviews were checked either by telephone.

Figure 8: Hotels Interviews Verified

Hotel Name	Country	Method of Verification
Tranquility Getaway	Grenada	Telephone
Bougainvillea Apartments	Grenada	Telephone
Siesta Hotel	Grenada	Telephone
Clarenceville Villa	Grenada	Telephone
Allamanda Beach Resort	Grenada	Telephone
Big Sky Lodge	Grenada	Telephone
Grooms Beach Villa & Resort	Grenada	Telephone
Relax Inn	Grenada	Telephone

Hotel Name	Country	Method of Verification
Alize Inn	St. Lucia	Telephone
Balenbouche Estate	St. Lucia	Telephone
Oasis Marigot	St. Lucia	Telephone
Casa del Vega	St. Lucia	Telephone
JJ's Paradise	St. Lucia	Telephone
Bay Gardens Hotel	St. Lucia	Telephone
Chez Camille	St. Lucia	Telephone

6. DATA USER GUIDE

6.1 Labels & Coding

Upon completion of the data collection, A2F exported the data to Stata and cleaned, coded and labelled the datasets. We labelled each variable with a short description of the question and created labels and coding for responses, where necessary. Labels and coding in the dataset follow the coding as recorded in the questionnaires. The survey used mainly closed questions and open questions requiring a numerical response. Monetary questions about wages, income, sales, etc. used the national currency, i.e. the Eastern Caribbean Dollar. For open questions for which the respondent did not provide an answer or closed questions where none of the answers were deemed appropriate, the question was coded as follows based on the response given:

Table 20: Common Coding Used for Non-response

Response	Code
Not applicable	-7
Refused to respond	-8
Don't know	-9

6.2 Variable Names

Each variable is named corresponding to the question number as specified in the questionnaire.

Multi-part questions and multiple choice questions in which multiple responses were allowed are named as the question number followed by an underscore and the option number.

- For example, the second option for question 4 is named q4_2.

Multiple choice questions with an “Other” option that the respondent is asked to specify are named as the question number, an underscore, the option number of “Other” and an x.

- For example, if “Other” is the 7th option on question 6, the specification for Other is named q6_7x

7. CHALLENGES

The most significant challenge faced in carrying out the survey was a low participation rate among hotel managers and owners. The sample sizes necessary to generate statistically robust analysis were relatively large in comparison to the survey universe. Thus, the sample size was close to a census, requiring near full participation from hotel managers. This posed a significant challenge because it was difficult to conduct interviews with managers and owners of hotels. Many managers said they were very busy and would not have time to be interviewed. Many also did not like the idea of having their employees interviewed. Those that did agree to be interviewed were often hesitant to provide sensitive financial and employment data. This was especially difficult in Saint Lucia, where hotel managers at small hotels were particularly reluctant to participate.

Several methods were used to increase participation rate:

1. A letter was signed by the World Bank explaining the study and lending credibility to the operation. This helped to convince many respondents that the information gathered was being used by a reputable organization and would not be shared with competitors.
2. A small number of respondents were hesitant to have an enumerator visit the hotel to conduct the interview, but were willing to do it over the phone. For these respondents, we conducted telephone interviews, rather than face-to-face interviews.
3. Hotels that refused or said they were unsure were re-contacted by a different supervisor in hopes that a new voice would prove more agreeable. Several hotels were recruited in this way.
4. Many hotel managers could not be reached via the phone numbers or email addresses publicly available. For these hotels, a supervisor was sent to visit the property and ask the manager to participate. This method proved to be successful for recruiting a small number of hotels.
5. Hotels were added to the original sampling frame, by visiting establishments and asking for references locally.
6. The survey implementation was also delayed due to a series of hurricanes that hit the Caribbean between August and September of 2017. St. Lucia and Grenada were in the outer rim of the paths of Hurricanes Irma, José and Maria. These islands had limited destruction of property as a result, but did face significant power outages that interrupted the ability to contact hotels and conduct interviews. Additionally, many hotel managers and owners vacated the islands prior to the Hurricanes as a precautionary measure and only returned after Hurricane season ended. Because of this, Accela was not able to carry out interviews for several weeks in September.