

Chapter 8

Gender and Social Inclusion

This chapter covers

- The conceptual framework of gender and social inclusion
- The implications of gender and social inclusion in mountain tourism, and the challenges that women face in the mountain tourism industry
- The process of mainstreaming gender and social inclusion in sustainable mountain tourism project cycles
- Skills in monitoring and evaluating the impacts of gender and social inclusion on mountain tourism development projects or programmes

Introduction: Challenges for Women in Mountain Tourism

Tourism has opened doors for many mountain societies as a means of earning a livelihood, especially for women and rural communities. Defining the tourism industry from a gender perspective is crucial, as tourism is a major employer of both women and men, with many impacts on women's lives in destination communities. Nevertheless, research on the gender dimensions of mountain tourism is still scarce. With its flexibility and capacity to include the most unskilled and disadvantaged people, such as mountain communities, women, and indigenous people, tourism has a great potential to reduce poverty among poor and socially excluded groups. It creates opportunities ranging from large-scale businesses to small cottage industries, micro-enterprises, and services. Tourism is one industry in which women's contributions are as much as men's. As stated by the International Labour Organisation (ILO), women's employment is 46 per cent of the global tourism workforce; and, in countries where tourism is a fully-fledged industry, like Nepal, the percentage could be as high as 50 per cent.

Women's role as the caretakers of households and communities at large has developed them as the prime tourism actors in destination communities. In most mountain communities, women are found engaged in cooking, managing local hotels and lodges, operating tea shops, making indigenous handicrafts, environmental conservation, cultural preservation, fruit and vegetable production, and beekeeping. Although women have a high rate of contribution and involvement in tourism, they still remain behind in terms of access to resources and benefits. Like any other sector, the tourism sector is mainly dominated by men in terms of decision making and controlling resources. The top positions in the tourism industry are mainly occupied by men in travel agencies, mountaineering, trekking, rafting companies, airlines, accommodation, and communication services, with good remuneration and involving frequent travel outside the village. Women are often found in the lower (paid) positions. Women are often a neglected stakeholder in tourism development, if seen as stakeholders at all. Different gender obstacles to women's participation in tourism have been noted (see Box 8.1). In addition, tourism often has different impacts on the lives of men and women. For example, women often feel the loss of natural resources first, but at the same time may be the first to benefit from

Box 8.1: Gender-Based Obstacles in Tourism Development in Nepal

	Individual	Household	Wider Community/National Context
Financial	Women lack access to business development services and financial services in their own right.	Men's control over cash income and men's expenditure patterns	Perceptions of men as controllers of money and loans.
Economic	Women undertake activities that produce low returns. Women have a heavy domestic workload.	Gender division of labour Unequal access and control of land, labour, and inputs Unequal control of joint household produce and income streams from this	Women are paid less for equal work. Women are locked in reproductive work or low-paid jobs. Stereotypes of appropriate roles for women in the economy Women lack access to markets for inputs and outputs if mobility is constrained due to social norms.
Sociocultural	Women not literate or educated; girls education is not prioritised.	Limited role for women in household decision making Violence towards women	Providers of business development services and financial services do not view women as a potential market. Women's mobility is constrained by social norms. Negative attitude towards business women
Political/ Legal	Women lack confidence to claim political/legal rights.	Women lack legal rights to jointly owned household assets.	Women's legal rights to household assets are not defined in law or useful for collateral. Women lack political positions to establish appropriate laws. Women lack legal support.

Source: Shrestha and Walinga 2003

infrastructural improvements that often accompany tourism development such as piped water and electricity.

There are many opportunities for women and socially-excluded groups to be empowered through tourism. The tourism industry can provide them with new entry points for (formal and informal) employment and opportunities for self-employment in small and medium-sized enterprises. Furthermore, it can allow them to carry out new roles for themselves and their families at home, as well as in the local power structures (CBOs, local governments, NGOs, and others), and to become increasingly involved in the decision-making process.

At present, however, the industry is not gender equal. To achieve balanced socioeconomic development in the sustainable mountain tourism sector, men and women, as well as different social groups with people with different skills, need to be involved. Gender-balanced and socially-inclusive tourism development is essential for sustainable mountain tourism development.

This chapter introduces the concepts of gender and social inclusion and shows how these can be mainstreamed. In the second volume, instruments that can be used to mainstream gender and social inclusion, such as a gender checklist (Tool 27), contextual analysis (Tool 5), social audit (Tool 31), and gender audit (Tool 26) are explained step by step.

Concepts of Gender Mainstreaming and Social Inclusion in Tourism

The importance of gender mainstreaming and social inclusion in tourism is paramount. The conceptual framework of gender and social inclusion needs to be understood in order to be able to mainstream both gender and social inclusion in tourism development.

Gender

Gender can be defined as the social construction of masculinity and femininity and the power relationship between men and women in society. It goes beyond the biological differences between males and females and deals with the social conception of tasks, functions, and roles attributed to women and men in the private and public spheres and to the attitudinal and behavioural treatment of males and females at all levels of society (household or family, institutions, and society at large).

Social exclusion

Social exclusion is the practical experience of different social groups who are systematically disadvantaged because they are discriminated against on the basis of their caste, gender, ethnicity, race, religion, sexual orientation, age, disability, health or HIV status, marital status (single women), migrant status, or because of remoteness or where they live. Exclusion happens in public (formal) institutions like the legal system, government offices, education, and the health system, as well as social (informal) institutions like the household (DFID 2005). There are different steps to mainstream gender and social inclusion.

Step 1: Awareness and initial participation

To increase and improve the participation of women and socially-excluded groups in tourism, affirmative action (like a quota system for capacity-building programmes), provides space for participation and prepares the ground for a favourable environment for women and socially-excluded groups to participate. While the mere presence of women and socially-excluded groups does not necessarily amount to full participation, it is a step towards mainstreaming.

Step 2: Empowered participation

Giving space to excluded groups to physically participate in a tourism programme does not necessarily mean that these groups will benefit from the programme. Participation in a tourism programme does, however, provide them with opportunities to learn and gain knowledge. This process will enhance the capacity of individuals and groups to think and analyse logically. Once they are able to consciously participate in programmes, these groups can be considered to be empowered. An empowerment programme is necessary to improve and enhance their capacities. Social mobilisation, participating in meetings, discussions, receiving encouragement, and involvement in capacity enhancement programmes, such as training, exposure visits, or familiarisation trips, helps to enhance the capacity of women and socially-excluded people to participate in an empowered way in sustainable mountain tourism development.

Step 3: Influencing and decision making

The next step in gender mainstreaming in sustainable mountain tourism is to provide space for leadership positions and build capacity for advocacy and influence in tourism organisations. This can be realised by providing space (through quotas) in decision-making positions for women and

socially-disadvantaged or marginalised groups, and by enhancing their capacity to manage resources, finances, assets, and the tourism programme itself effectively.

Step 4: Equitable sharing of benefits

The fourth step is to prepare policies, rules and regulations, and guidelines on the equitable sharing of the benefits of tourism revenue so that women and excluded groups can gain access to and control over resources. It is also necessary for women and excluded groups to enhance their capacity to increase their claim on these tourism benefits. Supportive policies, rules and regulations, and guidelines are not sufficient to distribute and receive tourism benefits. Both space for equitable sharing of benefits and an empowerment process are needed to achieve mainstreaming.

Box 8.2 presents the experiences of TRPAP, Nepal, in increasing women's participation in tourism.

Box 8.2: Case of TRPAP in Nepal

TRPAP is a tourism programme specifically designed to be pro-women, pro-poor, and pro-marginalised communities through community participation, developing backward and forward linkages, enhancing capacities, and providing access to capital for women and the poor. The programme has achieved substantial success in empowering women through entrepreneurship. It has improved their status through tourism development by providing women with entry points for employment, with opportunities to create self-employment in small and medium-sized enterprises, and by providing them with opportunities to participate in the sector in a more meaningful way. In all its activities, the programme emphasises the involvement of women and men equally in active participation and decision making.

Social mobilisation: To increase women's participation in tourism promotion, TRPAP hired women as social mobilisers (33%) to make sure that rural women's issues are not overlooked and that they don't succumb to the community demands, which are primarily dominated by men. Having women as social mobilisers has helped to make women in the villages more comfortable to come out of their homes, share problems, and to participate in activities and decision making. The TRPAP social mobilisers provided formal training and conducted awareness programmes on gender equality.

Equal participation: A quota system was set requiring a minimum of 40 per cent representation of either sex (male or female) in the formation of any community organisation. However, bringing women into the decision-making level was yet another challenge. TRPAP made a rule that the chairperson or manager of the community organisation should be a woman, thus giving women an influential position.

Representation of women in an institutional set-up: Similarly, guidelines were developed for the formation of the village-level tourism committees requiring the proper representation of women in the institutional set-up. Sustainable tourism development committees were formed with 25 per cent of seats reserved for women. These committees were recognised by the local government as grass roots' tourism institutions working for sustainable tourism development. Due to the lack of women representatives in the local authorities, the number of women found in STDCs was also negligible. However, the quota of 25 per cent made the participation of women possible to an extent, despite their non-representation in the local authorities. Today, out of the 14,650 members of TRPAP's community organisations, 7,545 are women, which is a significant 51.5 per cent.

Institutional development: Training courses have been run for sustainable tourism development section chiefs at the district level and sustainable tourism development units at the central level on gender management and development for sustainable tourism. The sustainable tourism development unit in the Nepal Tourism Board has also incorporated a gender component into their trainings as an important part of sustainable tourism development and created a separate gender portfolio in the unit, replicating the TRPAP model. As a result of TRPAP's initiatives, even in the formation of sustainable tourism development units at the central level, the ratio of women to men has been maintained at 1:2, appreciating the importance of women's involvement in sustainable development.

Box 8.2 (cont...)

Capacity enhancement: TRPAP has placed special emphasis on educating and improving women's awareness in its human resource development sector by providing women with training and non-formal education in relevant sectors and sensitising them to their potential and own progress through tourism development. Training has included English language training, business development services (including entrepreneurship development and management capacity enhancement), and skill development training with a special focus on promoting women-related indigenous skills and handicrafts for income generation. Since the inception of TRPAP, 53,880 people have been trained in capacity enhancement, the APPA approach, tourism environment and awareness programmes, and skill development programmes, with 23,699 being women beneficiaries, which is 44 per cent of the total number of people trained.

Venture capital fund: TRPAP has given first preference to requests made by women to obtain venture capital fund for tourism-related micro enterprises, and has given out loans to all women whose conditions have met the prerequisites needed for venture capital fund. The biggest problem facing women in obtaining capital has been their lack of ability in submitting proposals. Due to lack of education and confidence, they hesitate to apply for venture capital funds. TRPAP's social mobilisers especially facilitated women in proposal writing and submissions for loans. As a result, many women came up with micro enterprises such as homestays, tea shops, local lodges, handicraft sales, and so forth. Rasuwa's homestay programme is a successful model of a micro enterprise by women. Under this programme 24 homestays have been developed, all managed by women.

Infrastructure: TRPAP supports tourism infrastructures that facilitate women in their daily lives and gives such infrastructures as much importance as other community demands. Monitoring records have established that incinerators, toilets, biogas, improved cooking stoves, and drinking water sites, all of which have direct implications for the daily life of women, have been built in programme areas. For rural woman, these facilities, which were otherwise hard to come by, have been provided as part of TRPAP's pro-women initiatives in tourism development activities.

Policy-level interventions: The TRPAP programme prepared different policy documents, such as a pro-poor tourism policy draft, a National Strategic Tourism Plan, and five-year district tourism plans, all addressing gender issues in the tourism industry in a strategic manner.

Health, environment, and sanitation: Due to a lack of water and proper awareness, environmental concerns in rural areas remain at a low level, negatively affecting women's health in these areas. TRPAP addressed these concerns from a gender perspective and initiated environmentally-friendly practices. It supported the building of toilets, biogas plants, and improved cooking stoves provided with smoke hot water and solar water heaters, contributing directly to the improved health of women and their families. Women have also started using solar dryers to dry vegetables, which they sell to earn extra income, making them less economically dependent on their husbands.

Women's entrepreneurship in tourism: In TRPAP programme areas, tourism has demonstrated its potential to create jobs and encourage income-generating activities to benefit local communities. TRPAP's initiatives have provided various entry points for women's employment and opportunities to create self-employment in small and medium-sized income-generating activities, thus creating paths towards the elimination of poverty for women and local communities in developing countries. Community-based tourism initiatives, particularly by local women's groups and cooperatives, have proven to be an accessible and suitable entry point for women into the paid workforce. In some programme areas, such as Lumbini (the birthplace of Buddha), women and women's groups have started their own income-generating activities such as handicraft production. These activities have helped to create financial independence for the local Muslim women of Lumbini and challenged them to develop the necessary skills and improve their education. Financial independence and good education have led also to the improved self esteem of women and more equitable relationships in families and communities.

Mainstreaming Gender and Social Inclusion in the Tourism Project Cycle

In order to achieve true empowerment for women and other socially-excluded groups through tourism, gender and social inclusion need to be mainstreamed into every stage of the project cycle. This can be done, for instance, during the process of selection of mountain tourism sites and destinations, as part of the APPA exercises (see Chapter 6); through tourism awareness programmes; in product development; by ensuring equal access to credit and enterprise-related activities; in discussions and agreements on tourism revenue distribution mechanisms; through the development of market linkages; through training courses; and during monitoring and evaluation. Box 8.3 illustrates the gender mainstreaming results obtained using APPA by the Mountain Institute. As a guideline for ensuring gender equality in tourism projects and services in the project cycle, a gender checklist can be used (see Volume 2, Tool 27). There are two steps in mainstreaming gender and social inclusion in the different phases of the project cycle: analysis and assessment, and action or implementation.

Box 8.3: Appreciating Women's Roles in Tourism from a Regional Perspective

Three years of community-based tourism planning in Langtang and Helambu, Nepal, by The Mountain Institute has proved that the role of women in tourism and the benefits that they receive from tourism can be enhanced through an APPA approach to community planning in which the community acknowledges the value of women's contributions to tourism. Results of the project have shown that an appreciative approach that values women for their skills, and enhances their capacities in tourism as tourism and natural resource managers, achieved both conservation and the increased self-reliance of women. These results are not exclusive to Nepal. Similar results were seen in West Sikkim where women who participated in the APPA-based programme have become trekking guides and are actively involved in grass roots' NGOs that teach APPA and community-based tourism elsewhere in India. Women PRA facilitators from Nepal are using the APPA approach for community-based tourism and biodiversity conservation planning in Tibet and the Sichuan Province of China. Field practitioners from seven countries in South Asia and Africa have taken up the approach in their project areas.

Source: Lama 2000

Analysis and assessment

Baseline data are essential for addressing the proper needs and interests of the different social groups and women. Contextual analysis, social audits, gender checklists, and gender audits are useful tools for analysing and assessing the real situation of women and socially-excluded groups. The detailed steps in each tool are explained further in Volume 2. Each tool is briefly introduced below.

- **Contextual analysis:** Contextual analysis gives a picture of the society or institutions such as baseline data on demographics, conditions of the societal environment, development space, influential factors, and real needs (for more details see Volume 2, Tool 5).
- **Gender audit:** A gender audit calculates and compares the situation of women with men in society. A gender audit can be used by any organisation. It helps to define the situation of women and men and can support decision making about programme activities and priorities and, for instance, about budget allocation (for more details see Volume 2, Tool 26).
- **Gender checklist:** A gender checklist is a guideline for ensuring gender equality in tourism projects and services, and it helps in the formulation, implementation, and monitoring of gender-sensitive projects by asking questions about the gender sensitivity of organisations, projects, and documents (for more details see Volume 2, Tool 27).
- **Social audit:** A social audit gives a holistic picture of different social groups in relation to their power, access to resources, benefits, and who is deprived of benefits (for more details see Volume 2, Tool 31).

These tools will generate baseline data on the following:

- The best location to work in, local conditions, the environment, the existing social and economic situation, institutional arrangements, and political climate
- The need of the people, i.e., the people's existing social, economic, and political situation
- The priorities of women and socially-excluded groups and provisions for their involvement in decision making and equitable benefit sharing
- Budget allocation for gender mainstreaming and social inclusion programmes, and to what proportion of the population

Based on the baseline information, a tourism programme can be designed focusing on mainstreaming gender and social inclusion, as well as the empowerment of weaker groups.

Action or implementation

After a gender-balanced and socially-inclusive tourism development programme has been designed, it is essential to ensure that this programme will be properly implemented. Policies, rules and regulations, and guidelines by themselves do not ensure the qualitative measures of gender mainstreaming and social inclusion. While developing an area as a tourism destination, there are possible negative impacts that have to be considered. Usually, changes in labour relations and economic opportunities crafted by tourism development are gender blind, or can even have adverse effects on the vulnerable gender. Excessive work loads, invisibility of economic activities, the sexual objectification of women, the underpayment of women, commercial sex trade or prostitution, and an increased vulnerability to HIV and AIDS are some of the effects tourism can bring if not planned in a sustainable way (Kruk and Banskota, in preparation). Hence, the points below should be considered as a guideline for monitoring the tourism programme during implementation.

1. While implementing the programme, programme staff and management, as well as the organisational culture, should create a favourable environment for women and socially-excluded groups to participate in and discuss the programme.
2. While maintaining an enabling environment, the organisation and staff should take affirmative action to encourage women and socially-excluded people to participate by enforcing a quota system, through special consideration, and by designing programmes based on their needs.
3. Once women and socially-excluded groups are involved, the programme should focus on building their capacity by mobilising and motivating women and socially-excluded groups more effectively and providing positions for them in the decision-making process.
4. A capacity enhancement programme should be implemented for the specific target group (e.g., women and socially-excluded groups), enabling them to participate more meaningfully in the programme and to influence the organisation in more equitable sharing of its benefits (see also Box 8.4).

Box 8.4: Equitable Distribution of Tourism Benefit

The Mountain Institute has placed a lot of emphasis on the creation of equity in the distribution of tourism benefits resulting from their programmes. This equity is being created in their programmes through:

- A creation of (inclusive) associations
- A creation of committees
- The development of codes of conduct
- A standardisation of rates
- A process of participatory planning (see also Chapter 6)

Source: TMI 2007

Monitoring and Evaluation in Sustainable Mountain Tourism

Monitoring and evaluation together provide an effective tool for ensuring the quality and quantity of the programme's accomplishments in terms of mainstreaming gender and social inclusion.

Before implementation, it is necessary to distinguish among three aspects of monitoring:

1. Context
2. People who will benefit, e.g., men, women, and which social groups
3. Why the programme is being implemented (i.e., rationale)

These three aspects should be evaluated against the baseline data collected through the various gender and social inclusion tools (see 'analysis and assessment systems'). Although baseline data should ideally be available during the design phase, it could be prepared during planning or implementation of the programme. Monitoring can be done in the intervening time, whereas evaluation is done in a scheduled manner at set times, like mid-term evaluation and final evaluation. These three aspects will form the basis of the quantitative and qualitative analysis of the programme's success (DFID 2005).

More information about the process of monitoring and evaluation can be found in Chapter 11, and an example of monitoring tourism and gender equity is given in Box 8.5.

Box 8.5: Monitoring Gender Equity in Tourism

Family well-being

For many people in developing countries, both men and women, tourism can provide the first chance for formal employment. But with economic benefits, tourism employment can also bring consequences that adversely affect family well-being such as long hours and the stress that comes with the demands of shift work.

Key areas to be examined include the following:

- The consequences of tourism employment on family cohesion, women's workload, stress, and reproductive health
- The difficulties faced by women with babies and small children
- The safety of women at work with regard to dangerous activities, sexual harassment, and journeys to and from work for late shifts

Equal opportunities in formal employment

Income generation is generally the most important motive for participation by both women and men in the tourism industry, since tourism offers opportunities to disadvantaged groups, especially in remote rural areas.

Key areas to be examined include the following:

- The proportion of women in the formal and informal tourism workforce; seniority of women employees relative to their male counterparts; their relative pay and benefit packages
- Women who have managed to become entrepreneurs and owner-operators
- Training opportunities for female and male staff

Gender roles in traditional communities

Gender roles in traditional communities are often culturally determined and monitoring them is not necessarily designed to result in change. It can, however, raise awareness of the issues and help increase respect and acceptance for those men and women who break with accepted norms and take tourism entrepreneurship into their own hands.

Key areas to be examined include the following:

- The respective roles of men and women in traditional communities providing tourism services
- The proportion of women participating in tourism decision making
- Relative rewards and pay structure for men and women working in community-based tourism ventures

Context

Monitoring and evaluation provide a crucial and important tool for tracing the context. They should ask: What is the current status or situation? What has been changed by implementing the tourism programme? Has the programme had an impact on women and socially-excluded groups or their environment negatively or positively? Is the programme being implemented according to plan or not? Are any changes or adjustments needed to make the programme more effective and efficient? Are modifications necessary to address special target groups such as women and socially-excluded groups?

Monitoring and evaluation information will help to establish whether the programme is on track or has deviated; whether or not modifications are needed in the next phase; and whether or not it is an appropriate needs-based programme for the target group. Analysing this information enables needs-based design, plan, and implementation for the right target group.

People

For a tourism programme's impact on gender and social inclusion to be analysed, information is needed about social castes, economic conditions, and the sex (male or female) of programme beneficiaries. Disaggregated data should be collected on sex and the involvement and participation of social groups in the programme and their role in the decision-making process. Data are also needed about benefit sharing: Who receives benefits and how much? Who does not receive benefits? Who is excluded from the programme and from benefit sharing?

A tourism plan or programme should pay maximum attention to gender equality also. To achieve this a gender assessment can be used. This assessment examines the plan or proposal in terms of the attention paid to gender equality. It focuses on two questions: Does it give women the opportunity to participate in the project and will it benefit women?

The assessment can be carried out in different stages of the planning process. The purpose is to:

1. Estimate to what extent the project will offer women equal opportunities for participation.
2. Assess the effect that the project is most likely to have on women.
3. Formulate recommendations on how the project should be designed to empower women and avoid eventual negative effects on women.

An example of women's empowerment through good practices in tourism is given in Box 8.6.

Rationale

While implementing the programme, the rationale should be clear. It should be clear to all what is being implemented and for what reason. This rationale will form the basis for the planning, implementation, and monitoring or evaluation of the tourism programme.

Box 8.6: Good Practices

The Chhetri Sisters in Nepal – Empowering Women through Guiding

Lucky, Dicky, and Nicky Chhetri, three Nepalese sisters, are pioneers in the profession of female trekking guides. Since 1994, they have worked towards empowering women in Nepal.

In the early nineties no one would have dreamed of Nepalese women guiding a trek. Nepalese society is ruled by the orthodox Hindu religion in which women are considered second-class citizens. Their role is to be a diligent wife, a loving mother, and an obedient daughter-in-law. Society dictates that a woman should not leave her home, but the Chhetri sisters did just that.

“In 1993 we were running a restaurant and a lodge in Pokhara. We had the opportunity to meet women from all over the world. We came across some unhappy and frightened solo women travellers who had had bad experiences with their male guides. Upon hearing these stories, we felt sad and decided to do something immediately. With urging from our friends, we gathered up all our courage and entered into this uncharted territory.”

“Lucky, our oldest sister, had trained in The Himalayan Mountaineering Training Institute in Darjeeling, India, in 1990. The training sparked her interest in an adventurous life and we, her sisters, shared her feelings and dreamed of trekking in the Himalayas. This, combined with the requests from our trekking friends, gave us a unique idea for women to be trekking guides. In 1994, we started a women’s trekking guide service.”

Years earlier, during a field visit to the far west, Lucky saw the harsh lifestyles of the women. With their husbands and brothers gone to India, women were abandoned in the dry, uncultivated landscape of western Nepal. “I dreamed of working to support them. Our female trekking agency helped me realise that dream. Remembering these hard-working women, I recognised that rural women would be ideal candidates for female trekking guides and porters. This opportunity could offer them choices in what looked like an inevitably bleak future.”

“To include these women in the trekking industry, we created a training programme to provide them with the necessary skills. The early success of these first women inspired others. After a few years, women from all over the country were attracted to our programme for training and job opportunities. Some were low caste women who society looked down upon, others were socially disadvantaged and facing challenges in life. We have encouraged and motivated other Nepalese women from all backgrounds to enter the tourism industry.”

“Our aim has been, and continues to be, to empower and develop women through tourism and to encourage sustainable tourism in remote areas where there is little hope for the future.”

“It is not easy to break down social barriers in just a few years. Women trekking guides are a new concept for Nepalese society. It has been a great challenge to bring women into this industry, as society does not approve of women working as guides. But after a long struggle we have proven ourselves. Women can also work as guides if the opportunity is provided. We have demonstrated that women are mentally, physically, and emotionally as strong as men.”

Source: 3 Sisters Adventure Trekking 2007