

Visitor Satisfaction and Opportunity Survey Manang, Nepal

Market Opportunities for Linking Community-Based Ecotourism with Conservation of Snow Leopard in the Annapurna Conservation Area¹

Report submitted to:

**WWF-Nepal Programme
Kathmandu**

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July, 2002

Introduction

For the past two decades, the Manang or Nyeshang Valley has become one of the most popular trekking routes in Nepal, attracting over 15,000 trekkers annually (Ale, 2001). The 21-day circular trek takes the visitor from the lush southern slopes of the Annapurna massif around to its dry northern slopes more reminiscent of Tibet, through a landscape of spectacular mountain scenes, interesting villages and diverse cultures. The Manang region also offers prime habitat for the endangered snow leopard, supporting an estimated 4.8 – 6.7 snow leopards per 100 sq. km (Oli 1992). This high density has been attributed to the abundance of blue sheep, the snow leopard's primary large prey species across the Himalayan Mountains and Tibetan Plateau.

However, snow leopards kill livestock on occasion, leading to people-wildlife conflict. A study in the early 1990's indicated that some communities lost 14% or more of their sheep and goat herd, with snow leopards also killing high-valued stock like horses (Jackson et al 1993). The factors most closely associated with predation include lack of guarding (or very lax supervision), especially during the daytime, and repeated use of pastures where livestock depredators are present. Herders react to repeated depredation by attempting to trap or shoot the suspected culprit until losses decline to more acceptable levels. Circumstantial evidence from Manang

When quoting from this document, kindly cite the source as:

The Snow Leopard Conservancy. 2002. *Visitor Satisfaction and Opportunity Survey, Manang, Nepal: Market Opportunities for Linking Community-Based Ecotourism with the Conservation of Snow Leopards in the Annapurna Conservation Area*. Report prepared for WWF-Nepal Programme. SLC Field Document Series No 3, Los Gatos, California.

suggests that six or more snow leopards may have been killed over the past few years as a result of multiple, repeated livestock depredation. Although such loss can be reduced through improved guarding and animal husbandry practices, it cannot be totally eliminated. Also, given the remoteness of the area and the lack of staff to patrol its rugged terrain, the most feasible long-term solution for the conservation of snow leopard and other mountain wildlife doubtlessly lies in promoting community-based nature conservation or stewardship

In recent years, community involvement in wildlife tourism has received increased attention, especially in Africa where it has created new jobs for local residents, diversified rural economies, and increased awareness of local cultures (Ashley and Roe, 1997). Under the “if it pays, it stays” principle, local people may play a crucial role in protecting and managing wildlife and its habitat. Ecotourism has been widely promoted as a means for improving local incomes while conserving natural values, and many donors are interested in funding projects that combine tourism development with a high degree of community involvement or local participation in order to realize key conservation and sustainable development objectives (Brandon 1996).

In 2001, the King Mahendra Trust for Nature Conservation (KMTNC) and its Annapurna Conservation Area Project (ACAP), the Snow Leopard Conservancy (SLC) and WWF-Nepal initiated a collaborative project aimed at enhancing ecotourism in the Manang area, and linked to snow leopard conservation. The first step involved identifying how to provide more benefit to local communities from the numerous trekkers who pass through Manang and spend a day or two acclimatizing and preparing for crossing the 17,650 foot Thorang La (pass) into the Kali Ghandaki Valley. The development of locally guided nature treks presents one opportunity for local people not currently involved in lodge ownership or management to capture income. Accordingly, we conducted a questionnaire-based survey determine visitor interests and to assess local market opportunities and constraints to this and related ecotourism activities. This document describes results of that survey, based upon data tabulation conducted by Ms. Tara Gurung and Mr. Mingma Sherpa (unpublished document).

Methods

Information on visitor use and interest patterns were gathered through use of a self-administered questionnaire (see Appendix). Questionnaires were distributed on a random basis to tourists visiting Manang through the auspices of ACAP's Manang Unit Conservation Office. Visitors were sampled in late October-November, 2001 during the peak tourist season. Eighty-two questionnaires were completed during the one-month sampling period. These were collected, and the results tabulated using SPSS statistical software program.

While this survey provides useful insight into the overall preferences and perceptions of foreign visitors to Manang, the small sample size precludes any comparison between different nationalities or among low and high cost organized trekking groups. In addition, some important attributes like age, education, reasons for repeat visitation and group size are missing from the questionnaire, and thus the data set.

Results

1. Visitor Demography: The survey indicated that visitors to Manang come from a wide range of countries. Of the sixteen nationalities representing the respondent population (N=82), 17.1% were American, 12.2% were British and 8.5% were French (see Appendix 1 for details).

Respondents were fairly evenly distributed with respect to their sex, although female visitors (53.7%) slightly outnumbered males (45.1%). One respondent did not disclose this information.

Seventy-six of the respondents (92.7% of the overall sample) reported their profession, which were grouped into eight categories as indicated in Table 1. The majority of respondents (65.8%) identified themselves as being “professional,” with 11% constituting students and 2.4% as retired individuals.

Table 1: Occupational Composition of the Respondents

Occupation	No. respondents	Percentage
Professionals (doctor, engineer, lawyer, etc)	26	31.7
Other professionals (teacher, technician etc)	28	34.1
Student	9	11
Tour guide	2	2.4
Social worker	3	3.7
Housewife or other	5	6.1
Unemployed person	1	1.2
Retired person	2	2.4

In terms of annual income, respondents were given five different income categories from which to choose. Nine respondents (11%) did not answer this question. Of the remaining 73, most (54 or 65.9%) identified themselves as falling within the first income group (Table 2). Only 7 respondents (8.5%) reported their annual income as above 70,000 US dollars. Clearly, there needs to be more categories for the “under \$40,000” income bracket.

Table 2: Annual Income of Respondents

Annual Income (in US Dollars)	No. of Respondents	Percentage
40,000 or below	54	65.9
41,000 to 50,000	10	12.2
51,000 to 60,000	2	2.4
61,000 to 70,000	0	-
Above 70,000	7	8.5

2. Visitor Travel Patterns, Arrangements and Informational Sources: The questionnaire did not have a specific question concerning the typology of each respondent, or specifically whether they were an independent traveler (FIT visitor) or part of an organized group (OGT visitor). However, for the purposes of our study, we based this determination upon how they made their travel arrangements to reach Manang. Thus, visitors making their own travel arrangements were identified as FITs, whilst those traveling through a travel agency (national or international) are identified as OGT’s. Fifty-three respondents (64.6%) were classified as FIT’s and the remaining 29 visitors as members of an organized group. In terms of sex, visitors were equally distributed between the two types of traveler.

Only 14.6% (12) of the respondents had visited Nepal before, with 75% of these having made one prior visit. There was only one repeat visitor to Manang among the persons sampled. Note that respondents were not asked their reason for making a repeat trip.

Visitors reported that their trek lasted from 11 to 40 days, with a mean of 19.9 days. Table 3 indicates the sample distribution according to three categories of trek duration, namely 11-15 days, 16-21 days and 22-40 days. The most common trek for both FIT and OGT visitors lasted

16 to 21 days, and accounted for 67% of the respondents tallied. Twenty-two percent of visitors took longer to make the circuit. In general, those spending less time tend to be persons classified as an OGT traveler. Little or no difference in the length of trekking was noted between male and female respondents. Given the area's remoteness and relative difficulty of access via air, very few people come simply to visit Manang village. Rather, as noted in the introduction to this report, most come for trekking the entire or major portion of the Annapurna Circuit. Nearly all guidebooks and ACAP 's own literature recommend the Annapurna circuit trek as a 15-21 day trek.

Table 3: Number of Planned Trekking Days by Type of Tourist

Number of Trekking days	Response by tourist type		All Respondents
	FIT	OGT	
11 – 15 days	3 (5.7%)	6 (20.7%)	9 (11 %)
16 – 21 days	38 (71.7%)	17 (58.6%)	55 (67 %)
22 – 40 days	12 (22.6%)	6 (20.7%)	18 (22 %)
Total	53 (100%)	29 (100%)	82 (100 %)

Only 15 or 18.3% of visitors sampled reported using a travel agency for their international travel arrangements, with the remaining 67 visitors (81.7%) traveling independently to Nepal. Once in the country, however, 35.4% of the respondents arranged through agencies located in Kathmandu or Pokhara for travel to Manang. One visitor reported using an international travel agency to arrange for both travel segments. For a list of international and in-country agencies used, see Appendix 2a and 2b.

Most persons learned about Manang from guide books, magazine articles or trekking maps (56.8%), and via word of mouth from family members or friends (26.3%), or persons they met along the trail (8.4%). A few traveled to Manang on the basis of information offered by their porters, while a remarkably low percentage (5.3%) said they came on the recommendation of a travel agent (Table 4).

Table 4: Sources of Information about Manang

Source of information	Number of Responses	Percentage
Guide book, magazine articles, travel book or a trekking map	54	56.8
Family and friends (personal recommendation)	25	26.3
From persons met along the trail	8	8.4
Travel agency	5	5.3
Porters	3	3.2
Totals	95	100.0

4. Motivation, Perception and Preferences of Visitors: We asked respondents to rate wildlife, culture and scenic landscape in terms of their importance in drawing them to Manang (for details, see Table 5 on Page 8 of this report). Of the three features, landscape proved to be the strongest motive. Altogether 76 (92.7%) respondents indicated that landscape was either an important (N=14) or very important (N=62) feature that motivated them to visit Manang.

Landscape and scenery provided the strongest motivational factor to both FITs (94.3%) and OGT (89.6%) travel groups.

As an attraction, it was followed by culture, with 91.5% of respondents identifying it as being very important (N=39) or important (N= 36). A slightly higher percentage of FIT visitors (94.3%) were motivated by culture than OGT visitors (86.2%). Wildlife ranked lowest in the scale, at least according to the visitors sampled. Only 48 of the respondents (58.5%) considered wildlife to be very important (N=22) or important (N=26) in motivating them to visit the Manang area. It should be noted that 26 respondents or nearly 32% of the sample did not answer this question. Slightly more OGT visitors than FIT visitors were attracted because of wildlife viewing (62.1% versus 56.6%).

When specifically asked about snow leopards as an attraction, only 28% (N=23) of the respondents were aware that the Manang area supported a good population of this species. Such awareness was higher among FIT visitors (35.8%) than OGT visitors (13.8%). However, an equal proportion (FIT = 49.0%; OGT =51.7%) felt the presence of this endangered cat would add appeal to Manang as a travel destination.

5. Use of Trekking Guides: Slightly more than half of the visitors (51.2%) employed guides for their trip to Manang, all of whom were Nepali. While thirty visitors (36.6%) secured guides through a trekking agency or were provided one by the agency which had organized their trip; twelve visitors (14.6%) reported that they had hired guides independently. Only thirteen visitors identified where their guides came from: seven had been hired in Pokhara, five in Kathmandu and one in Besisahar, the trekking gateway to Manang. Twenty-seven visitors who employed guides did not respond to this question.

Respondents were then asked to rate their guides' knowledge of the natural environment and wildlife, local culture and overall guide service provided, according to five performance levels (from excellent, good, satisfactory, and unsatisfactory to poor). Guide knowledge of the natural environment received the lowest overall rating, although it was still considered satisfactory (Table 6). Of the 41 responses tallied, 26 respondents or 63.4% felt that their guides' knowledge of the natural environment and wildlife was excellent (N=10) or good (N=16). Only 12.2% considered their guides' knowledge as poor or unsatisfactory. Visitors reported that their guides had good knowledge of the local culture, and very few (7.5%) felt they had received poor or unsatisfactory service. Patterns were similar between FIT and OGT visitors.

Table 6: Visitor Rating of Guides Knowledge and Service

Guides' knowledge and services	Response					Total
	Excellent	Good	Satisfactory	Un-satisfactory	Poor	
Knowledge of natural environment and wildlife	10 (24.4%)	16 (39.0%)	10 (24.4%)	4 (9.8%)	1 (2.4%)	41
Knowledge of local culture	16 (38.1%)	16 (38.1%)	5 (11.9%)	4 (9.5%)	1 (2.4%)	42
Overall service rendered	19 (47.5%)	16 (40.0%)	2 (5.0%)	2 (5.0%)	1 (2.5%)	40
<i>Average</i>	<i>15 (36.6%)</i>	<i>16 (39.0%)</i>	<i>6 (14.6%)</i>	<i>3 (7.3%)</i>	<i>1 (2.4%)</i>	<i>41</i>

Note: Percentages in parenthesis are percentages of the row total.

6. Other Services: The results of respondent rankings of sanitation and the quality of food and lodging are shown in Table 7. Most visitors considered the food served and lodging provided as

good or excellent (91.5 and 86.5% respectively). There was some reservation among respondents regarding the level of sanitation. Thirteen persons (16.6%) indicated sanitation was either unsatisfactory or poor, with only 42.2% considering it to be good or excellent.

Table 7: Visitor Rating of Basic Services in Manang

Services	Response					Total
	Excellent	Good	Satisfactory	Un-satisfactory	Poor	
Sanitation	6 (7.7%)	27 (34.6%)	32 (41.0%)	10 (12.8%)	3 (3.8%)	78
Food	26 (31.7%)	49 (59.8%)	7 (8.5%)	-	-	82
Lodging	17 (20.7%)	52 (65.8%)	9 (11.4%)	-	1 (1.3%)	79
<i>Average</i>	<i>65 (20.0%)</i>	<i>43 (53.8%)</i>	<i>16 (20.0%)</i>	<i>3 (3.8%)</i>	<i>1 (1.3%)</i>	<i>80</i>

Note: Percentages in parenthesis are percentages of the row total.

7. Local Tourist Attractions: Respondents were requested to rank thirteen different existing or potential attractions in Manang according to a five level performance scale (from very important to very unimportant). Table 8 (see Page 8) shows the rank order of each feature. Respondents considered the most important features, in decreasing order of importance, to be: mountain scenery (93.9%); the remoteness and wilderness nature of Manang (85.9%); the trekking experience the circuit offers (85.2%); opportunities for meeting local people (81.5%); the availability, variety, and quality of area lodges (79.3%); tourism that benefits local people (79%); the availability of locally produced vegetables (78.1%); local culture (69.5%, which tied with wildlife viewing opportunities); and the availability of local handicrafts (56.8%). The figures in brackets indicate the percentage of respondents who considered the particular attribute as important or very important. Other attributes ranked were the hiring of local staff (54.6%), camping (8.9%) and information on the area (62.2%). The high rating provided to each element suggests that visitors may value all of the features listed in the questionnaire.

Respondents were then queried on which kind of facility or service they would patronize if it were made available. These included a local nature or cultural museum, evening cultural programs (such as ethnic dancing), and village tours. They were also invited to offer their own suggestion of services and activities.

A nature - cultural museum appeared to be the most preferred prospective tourist activity for the future. Fifty-three (64.6%) respondents indicated that they would make use of such a facility (Table 9). A fair number of visitors (51.2%) expressed interest in evening cultural programs, with fewer desiring a village tour (20.7%) or other tourist facilities (19.5%). Manang, Chame and Bhraka were identified as prospective villages for nature walks. The other facilities that respondents said they would be interested included an interactive cultural program, interpretive information about nature, wildlife and culture, festivals, the designation of praying hours in local monasteries, helicopter flights, movies and e-mail service. The survey indicated OGT visitors to be generally less interested in such activities than FIT visitors.

8. Guided Nature Walks: Ninety percent of the respondents (N=80) expressed an interest in nature walks, with the interest being slightly higher among OGT visitors (96.6%) than FIT visitors (83.0%).

Respondents were offered with seven areas of interest that they could learn about during a nature walk. Most respondents (78.0%) indicated that they would like to learn about the geology, glaciers and mountains (Table 10). Similarly, fifty-nine (72.0%) and fifty-three (64.6%) respondents respectively reported that they would like to learn about the local culture and village life, and rare wildlife like snow leopards. Other activities, such as seeing wildflowers or bird watching, were identified by fifty percent or less of the respondents. Similar patterns existed between FIT and OGT visitors.

Table 9: Visitor Interest in Various Tourist-oriented Services

Facility or Activity	Interested			Not Interested		
	FIT	OGT	Total	FIT	OGT	Total
Local nature/cultural museums	36 (67.9%)	17 (58.6%)	53 (64.6%)	17 (32.1%)	12 (41.4%)	29 (34.5%)
Village tour	14 (26.4%)	3 (10.3%)	17 (20.7%)	39 (73.6%)	26 (89.7%)	65 (79.3%)
Evening cultural programme	33 (62.3%)	9 (31.0%)	42 (51.2%)	20 (37.7%)	20 (69.0%)	40 (48.8%)
Others	13 (24.5%)	3 (10.3%)	16 (19.5%)	40 (75.5%)	26 (89.7%)	66 (80.5%)

Note: Percentages in parenthesis are percentages of the total figure of respective column titles.

Table 10: Preferences for Different Nature Walk Topics:

Area of interest	FIT	OGT	Overall Response
Birds	26 (49%)	12 (41.4%)	38 (46.3 %)
Mammals	27 (50.9%)	12 (41.4%)	39 (47.6 %)
Rare wildlife like snow leopards	34 (64.1%)	19 (65.5%)	53 (64.6 %)
Flowers/shrubs/trees	26 (49%)	15 (51.7%)	41 (50 %)
Geology, glaciers and mountain peaks (landforms)	41 (77%)	23 (79.3%)	64 (78 %)
Local culture and village life	40 (75.5%)	19 (65.5%)	59 (72 %)
Agriculture and animal husbandry	24 (45.3%)	10 (34.5%)	34 (41.5 %)

When questioned about the length of a nature walk, the visitors tended to prefer a tour of shorter duration (Table 11). Thus, 53% of respondents felt that a 3-5 hour walk would be ideal. The least preferred nature walks were those of 2-3 days or longer in duration, suggesting that most visitors are constrained by time.

Table 11: Preferred Length of Nature Walks

Length of the walk	FIT	OGT	Overall Response
2-3 hours	15 (28.3%)	10 (34.5%)	25 (30.5 %)
3-5 hours	28 (52.8%)	16 (55.1%)	44 (53.7 %)
All day	12 (22.6%)	7 (24.1%)	19 (23.2 %)
2-3 day	4 (7.5%)	3 (10.3%)	7 (8.5 %)
Longer than 2/3 days	1 (1.9%)	2 (6.9%)	3 (3.7 %)

Table 5: Visitor Motives for Visiting Manang

Motive	Level of importance respondent attributes to factor												Total Response		
	Very Important			Important			Unimportant			No opinion			FIT	OGT	Grand Total
	FIT	OGT	Total	FIT	OGT	Total	FIT	OGT	Total	FIT	OGT	Total			
Wildlife	16 (30.2%)	6 (20.7%)	22 (26.8%)	14 (26.4%)	12 (41.4%)	26 (31.7%)	4 (7.5%)	2 (6.7%)	6 (7.3%)	1	1	2 (2.4%)	35 (72.4%)	21 (72.4%)	56 (68.3%)
Culture	28 (52.8%)	11 (37.9%)	39 (47.6%)	22 (41.5%)	14 (48.3%)	36 (43.9%)	1	1	2 (2.4%)	-	1	1 (1.2%)	51 (96.2%)	27 (93.1)	78 (95.1%)
Landscape	43 (81.1%)	19 (65.5%)	62 (75.6%)	7 (13.2%)	7 (24.1%)	14 (17.1%)	1	-	1 (1.2%)	-	1	1 (1.2%)	51 (96.2%)	27 (93.1)	78 (95.1%)

Table 8: Visitor Rating of Attractions in Manang

Attractions	Response						Importance Matrix (a + b)	Rank
	Total response	Very important (a)	Important (b)	Neither important nor unimportant	Unimportant	Very unimportant		
Mountain scenery	81	71 (87.7%)	5 (6.2%)	2 (2.5%)	-	3 (3.7%)	76 (93.9%)	1
Wilderness / remoteness	80	43 (53.4%)	26 (32.5%)	8 (10.0%)	-	3 (3.8%)	69 (85.9%)	2
Trekking / Physical activity	81	48 (59.3%)	21 (25.9%)	8 (9.9%)	3 (3.7%)	1 (1.2%)	69 (85.2%)	3
Camping	79	1 (1.3%)	6 (7.6%)	24 (30.4%)	7 (8.9%)	41 (51.9%)	7 (8.9%)	12
Information on the area	82	16 (19.5%)	35 (42.7%)	23 (28.0%)	3 (3.7%)	5 (6.1%)	51 (62.2%)	9
Information on local culture	82	25 (30.5%)	32 (39.0%)	16 (19.5%)	6 (7.3%)	3 (3.7%)	57 (69.5%)	8 (I)
Opportunities for meeting local people	81	22 (27.2%)	44 (54.3%)	10 (12.3%)	4 (4.9%)	1 (1.2%)	66 (81.5%)	4
Tourism benefits the local people	81	33 (40.7%)	31 (38.3%)	12 (14.8%)	2 (2.4%)	3 (3.7%)	64 (79.0%)	6
Hiring of local staff	77	19 (24.7%)	23 (29.9%)	25 (32.5%)	4 (5.2%)	6 (7.8%)	42 (54.6%)	11
Guest lodges – variety, availability & quality	82	31 (37.8%)	34 (41.5%)	14 (17.1%)	1	2 (2.4%)	65 (79.3%)	5
Availability of locally produced vegetables	82	30 (36.6%)	34 (41.5%)	14 (17.1%)	1	3 (3.7%)	64 (78.1%)	7
Availability of local handicrafts	81	13 (16.1%)	33 (40.7%)	22 (27.2%)	7 (8.6%)	6 (7.4%)	46 (56.8%)	10
Wildlife viewing	82	24 (29.3%)	33 (40.2%)	16 (19.5%)	5 (6.1%)	4 (4.9%)	57 (69.5%)	8 (II)

9. Guide Service Preferences: Survey respondents indicated a strong interest in using local guides. Thus, 56.6% expressed their desire to have a guide compared to 43.4% who would be willing to use a self-guided tour or a guidebook (Table 12). FIT visitors were more interested in securing a guide than OGT visitors, presumably a reflection that group visitors would be more likely to be accompanied by an experienced trek guide or leader than would FIT visitors.

Table 12: Type of Guide Preferred for Nature Walks

Type of guiding preferred	FIT	OGT	Overall Response
Guide books and self guided tour	23 (43.4%)	8 (27.6%)	31 (37.8 %)
Nature guide (local villager)	30 (56.6%)	13 (44.8%)	43 (52.4 %)
Experienced trek guide/leader	7 (13.2%)	13 (44.8%)	20 (24.4 %)
Experienced naturalist	16 (30.2)	7 (24.1%)	23 (28 %)

10. Visitor Spending Pattern and Willingness to Pay: *Pattern of spending:* The visitors sampled spent an average of \$ 6.30 (US) on food and beverages per day. Less was spent on accommodation (\$ 1.14), the purchase of souvenirs (\$ 0.78) and for a trekking guide (\$ 1.54). Table 13 (see Page 9) indicates spending patterns according to several categories. Thus, three-quarters of respondents spent more than \$5 per day on food or beverages, with 56% reporting they had spent only two dollars or less on their accommodation (a bed in a separate or common room). Porter costs were generally recorded under the “other” category. The pattern of spending amongst OGT and FIT visitors showed some variation with a larger proportion of FIT visitors spending more on food, beverages and accommodation compared to OGT visitors. Similarly, a larger proportion of OGT visitors spent more on trekking guides than did the FIT visitors.

Willingness to Pay: Respondents were asked to indicate how much they would be willing to pay for selected services (both the minimum and maximum amounts). This information is summarized in Table 14. Several points should be highlighted: first, fewer respondents completed this section of the questionnaire compared to the other questions posed. The low response may be due a lack of awareness of local pricing structures, or it could be attributed their disinterest to partaking of the specified activity. As noted earlier, visitors showed little interest in a nature trek of several days duration (23.1% of respondents only), instead showing greater preference for 2-3 hour nature walks (53.7 %).

Table 13: Visitor Spending Patterns

Area of spending	Spending category (US dollars)												Total Spenders			
	< 2 US \$			US \$ 2 – 4.9			US \$ 5 – 7.9			US \$ 8 and above			FIT	OGT	Grand Total	%
	FIT	OGT	Total	FIT	OGT	Total	FIT	OGT	Total	FIT	OGT	Total				
Food & Beverages	0	3	3	6	2	8	26	9	35 (42.5%)	18	10	28 (34.1%)	50 (94.3%)	24 (82.8%)	74	90.2%
Souvenirs	4	6	10	4	2	6	5	0	5	1	0	1	14 (26.4%)	8 (27.6%)	22	26.8%
Accommodation	37	9	46 (56.1%)	5	2	7 (8.5%)	0	3	3	1	0	1	43 (81.1%)	14 (48.3%)	57	69.5%
Trekking guide	0	1	1	6	3	9	3	3	6	1	4	5	10 (18.9%)	11 (37.9%)	21	25.6%
Others	1	3	4	2	2	4	6	3	9	1	1	2	10 (18.9%)	9 (31.0%)	19	23.2%

Note: Percentages in parenthesis are percentages of the total of the respective column titles.

Table 14: Visitor Willingness to Pay for Different Services

Type of Service	Minimum Rate (per entry, tour or day)			Maximum Rate (per entry, tour or day)		
	Average willingness to pay (in US\$)	Range of suggested cost (in US\$)	Number respondents & percents	Average willingness to pay (in US\$)	Range of suggested cost (in US\$)	Number respondents & percents
Entrance fee to the museum	1.5	0.3 – 5.0	26 (31.7%)	2.73	1.0 – 10.0	30 (36.6%)
Village tour (1 ½ hours)	1.8	0.3 – 7.0	28 (34.1%)	2.9	0.7 – 18.0	32 (39.0%)
Village tour (½ day)	2.5	0.5 – 8.0	28 (34.1%)	4.9	0.7 – 40	32 (39.0%)
Cultural evening	1.8	0.3 – 5.2	28 (34.1%)	3.1	0.7 – 10	34 (41.5%)
Nature walk (2-3 hours)	2.5	0.5 – 10.4	38 (46.3%)	3.8	1.3 – 20	44 (53.7%)
Nature walk (1 day)	4.5	1.0 – 25.0	31 (37.8%)	7.3	1.0 – 50	32 (39.0%)
Nature trek (several days)	19.5	1.0 – 100.0	19 (23.1%)	48.0	5.0 – 400.0	19 (23.1%)

Note: Percentages in parenthesis are percentages of the total respondents (82 respondents)

Conclusions and Recommendations

Although the survey produced mixed results, it clearly demonstrates a high level of interest among trekkers that more benefit from tourism should accrue to the local community. As implied in Box 1, CBT or Community-Based Tourism initiatives need to be carefully designed and implemented in a highly participatory manner if they are to achieve their intended objectives. The best market opportunities for generating such income in Manang appears to be associated with offering guided nature walks and visitor-local people interactions or cultural experiences. Given the large number of people that pass through the area, there are good opportunities to develop tourist activities that promote community-based stewardship of snow leopards and other wildlife. ACAP could play a pivotal “matchmaking” role in this regard by linking outside trekking agencies with local communities and entrepreneurs, and also by ensuring that the environment is not further degraded through ill-conceived or poorly implemented tourism development.

Box 1: What is CBT?

Community-Based Tourism – A working definition
Visitor-host interaction that has meaningful participation by both and generates economic and conservation benefits for local communities and their environments
Rationale: <ul style="list-style-type: none">▪ Offers effective strategies for integrating conservation and development – top-down approaches and strict enforcement have not always worked in conservation and development efforts▪ Local management is more accountable and sustainable▪ Desire for more equitable distribution of benefits from tourism, especially given that it is the largest industry in the world.
Key Objectives: <ul style="list-style-type: none">▪ Generate conservation benefits (in this case strengthening community-based stewardship of snow leopards, their prey and habitat)▪ Generate economic benefits that serve as incentives to conserve▪ Participation by stakeholders▪ Provides a quality experience for the visitor <p>Adapted from: Ecotourism Opportunities in Rural Ladakh, a Planning Workshop sponsored by The Mountain Institute, Ladakh Ecological Development Group, and the Snow Leopard Conservancy, May 2001</p>

Our key findings and suggestions for tourism opportunities are summarized in the following paragraphs:

- Most visitors are motivated to visit Manang after learning about this area from guidebooks or via word of mouth. This indicates the importance of ensuring that any local community tourism activities are properly advertised and of high quality so that reports of successful visitor experiences are widely spread.

- Over half of the FIT and OGT visitors are already hiring Nepalese guides. Ideally, guides recruited from within the Manang area would constitute a relatively high proportion of the labor pool. This should be feasible as many visitors hire their guide upon arrival in Kathmandu or Pokhara (the latter town essentially serving as the entry point to ACAP). However, suitably qualified and motivated candidates will need to be found and then trained. Also, travel agencies should be encouraged to hire them on a permanent or contractual basis.
- Over 90% of respondents expressed an interest in a nature walk, but these tours need to be on the order of 3-5 hours in duration. It should be possible to identify prospective guides from among the local village youth in Manang, Braga or Khangsar. They will need to possess basic spoken English skills. Successful trainees could be given basic training and supplied with binoculars, field guides and other appropriate literature or materials. Their services could be advertised through notices or brochures placed at ACAP's Pokhara and Manang visitor centers and in lodges along the Annapurna Circuit itself. Notices could also be posted with KEEP in Kathmandu, and through selected travel agencies specializing in the Annapurna Circuit and who demonstrate a commitment to supporting community-based tourism. Discussions are needed to set realistic fee scales, and to make necessary arrangements for ensuring a portion of the fees collected accrues to the community at large and in support of environmentally sound and socially responsible activities. Presumably this could be accomplished through a special "tourism" fund that could be administered by a local community committee with a proven track record. Priority should be placed on supporting activities with a sound conservation component, in order to improve or at least maintain the quality of the environment.
- Special snow leopard walks could be arranged in which visitors could be virtually guaranteed seeing sign of this rare predator depending upon the time of year. Certainly, sightings of its main prey, the blue sheep, would be high regardless of season. The diversity of habitats and terrain in the Manang area offers good opportunities to observe many plants and birds.
- While there is less of a demand for 2-3 day "side treks," this specialty market could be quite profitable if judiciously developed by qualified trekking agencies and if the Tilicho Lake to Jomsom route were to be opened to general trekking.
- Respondent "willingness to pay" data suggest that local guides could charge two to five dollars per person for a morning or afternoon's tour; given the number of trekkers that pass through Manang each season there should be enough business to support a small corps of local nature guides.
- A key objective of this ecotourism initiative involves promoting conservation of the snow leopard, which requires that local people perceive linkages between income earned from tourism and the need to protect an often trouble some predator. Furthermore, collective resource management depends not only on incentives, but on local people having secure resource access rights, responsibilities, skills and suitable management institutions (Ashley and Roe 1997) (see below for important comments in this regard).

Next Steps

General Recommendations:

- 1) While this survey offers a good basis for initiating selected community-based tourism activities, there needs to be ongoing research and monitoring to ensure activities remain responsive to the interests and needs of visitor and local resident alike. One-off visitor surveys are not to be relied upon in the fiercely competitive and highly fickle tourism world. The importance of being sensitive to local people's needs and values cannot be over-emphasized if the objective of equitable benefit distribution is to be achieved. As the events of September 11 and the current Maoist insurgency in Nepal demonstrate, local communities need to be prepared to withstand downswings in visitation levels due to events beyond their control.
- 2) Visitors are at the heart of any tourism activity. Planners must therefore pay careful attention to their desires so that the stakeholders can effectively respond to market forces and opportunities affecting sustainable community-based tourism (CBT). Experience indicates that very little tourist expenditure stays within the locality visited, so that special efforts are warranted to ensure local individuals, entrepreneurs and businesses have priority with respect to training, promotions and other marketing tools. Also, ACAP and the other project sponsors should ensure that local communities and organizations are able to participate at all decision-making levels, so they can become more fully empowered to initiate new CBT initiatives of their own.
- 3) Project proponents should ensure that funding for developing and supporting CBT initiatives in Manang is implicitly linked to the conservation of snow leopard and its habitat, perhaps under a region-wide awareness-raising program. The more incentives and cash earnings are communal, the more likely that collective resource conservation will ensure. It is important to remember that the conservation of a species and its habitat usually requires the commitment of all or most residents, whereas a minority generally only receives cash benefits from tourism. And even if benefits are widely received, the beneficiaries may perceive no linkage with snow leopards --- unless project sponsors specifically highlight such conditionality. This requires that such linkages be repeatedly stated at all public meetings or planning fora.

Specific Recommendations:

- 1) As a first step, we recommend that 8-10 local persons be provided with nature guide training later this year. The first step would be to develop a TOR for the selection of candidates and a consultant to conduct the training.
- 2) It would be worthwhile interviewing independent and agency guides to get a sense of the range of skills and knowledge they feel are important to good client-tourism staff relations.
- 3) WWF-Nepal and KMTNC/ACAP should designate one or more resource persons to provide project coordination and contact with the local community, and to ensure this project meshes with ACAP's annual work plan and overall management plan.
- 4) The other institutional need for carrying the project forward includes identifying which committee or group of community members would be most able and committed to conduct necessary follow-up and to ensure close coordination with ACAP and the external collaborators (WWF-Nepal and SLC). Prospective candidates include the Youth Group and the Snow Leopard Committee that was established by ACAP several years ago. Linkages are also needed with local entrepreneurs like Mr. Tripple Gurung and others.

- 5) Once these structures are in place, a meeting should be held with the three local communities (Braga, Khangsar and Manang) to determine their interest and commitment to CBT, and to initiate long-term planning and CBT action. This process has to be highly participatory, and to this end we highly recommend the use of such tools as APPA, along with the special training manual prepared on CBT. The development of village-specific "Action Plans" would be an important objective of such meetings.
- 6) Finally, the project sponsors should develop a Concept Paper and proposal for securing ongoing funding. It is recommended that WWF-Nepal take this lead on this activity.

Acknowledgements: We are indebted to Mr. Gehendra Gurung, Director of the Annapurna Conservation Area Project (ACAP) of KMTNC and Dr. Chandra Gurung, Director, WWF-Nepal Programme for supporting this initiative. The survey was funded under a grant from WWF-Nepal to SLC, to whom we extend our appreciation. Ms. Tshering Lama prepared the questionnaires that were administered by the staff of ACAP's Manang Unit Conservation Office. Ms. Tara D. Gurung and Mr. Mingma N. Sherpa conducted data tabulation and analysis. Rodney Jackson, Director, SLC, compiled this report.

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Appendices

Appendix 1: Nationality and Sex Composition of Visitors Sampled.

Country	Sex			Response	
	Male	Female	NA	Total	Percentage
American	6	8		14	17.1 %
Argentine	0	2		2	2.4 %
Australian	1	3		4	4.9 %
Austrian	1	3	1	5	6.1 %
Basque	3	2		5	6.1 %
Belgian	1	3		4	4.9 %
British	4	6		10	12.2 %
Canadian	1	2		3	3.7 %
Danish	1	3		4	4.9 %
Dutch	4	2		6	7.3 %
French	4	3		7	8.5 %
German	4	2		6	7.3 %
Israeli	2	3		5	6.1 %
New Zealander	3	0		3	3.7 %
South African	1	0		1	1.2 %
Swiss	0	2		2	2.4 %
Non Response	1	0		1	1.2 %
Total	37 (45.1 %)	44 (53.7 %)	1 (1.2 %)	82	100 %

Appendix 2a: Agents used by Some Visitors for Travel to Nepal

Travel Agency	Response	Percentage
Broere Reizen	2	2.4 %
Camin Del Mon (Espana)	1	1.2 %
Flight Center	1	1.2 %
HFT	1	1.2 %
Mandala Trekking	2	2.4 %
Motherland Nepal	1	1.2 %
Shambala Trekking	2	2.4 %
Travel House, Seattle	3	3.7 %
Did not provide names	2	2.4 %

Appendix 2b: Agencies used by Some Visitors for Organizing Travel to Manang

Name of Agent	Response	Percentage
HFT (Overseas)	1	1.2%
Annapurna Treks and Expeditions (KTM)	1	1.2%
Asian Trekking (Kathmandu)	4	4.9%
Beyond the Limit (Kathmandu)	2	2.4%
Buddha Travel	2	2.4%
Ganesh Himal	4	4.9%
Going Places (Pokhara)	1	1.2%
Himalayan Glacier Trekking	1	1.2%
Langtang Ri (Kathmandu)	1	1.2%
Lubbly Jubbly Hotel (Pokhara)	1	1.2%
Mandala Trekking (Kathmandu)	2	2.4%
Motherland Nepal	1	1.2%

Nepal Vision (Kathmandu)	2	2.4%
Shambala Trekking (Kathmandu)	2	2.4%
Swissa (Pokhara)	2	2.4%
Kathmandu Pokhara agency (did not mention name)	2	2.4%
Grand total	29	35.4%

Appendix 3: Sample Questionnaire

Tourist Satisfaction and Opportunity Survey

KMTNC/ACAP, WWF-Nepal Program and the Snow Leopard Conservancy request your participation in a survey aimed at enhancing ecotourism in the Manang area -- in ways that strengthen benefits to local communities while also protecting the environment and local culture. Manang supports a good snow leopard number along with its main prey, the blue sheep. However, snow leopards also kill livestock. In order to encourage local herders to co-exist better with them and other wildlife, we are exploring how to provide more benefits to local communities from trekking and nature tourism.

Thank you for your cooperation!

Please circle or tick your answers.....

1. Nationality: 2. Sex: Male Female

2. Occupation:

3. Annual Income in US dollars:

<input type="text"/>	40,000 or less	<input type="text"/>	61,000 to 70,000
<input type="text"/>	41,000 to 50,000	<input type="text"/>	Above 70,000
<input type="text"/>	51,000 to 60,000		

4. Have you visited Nepal before? No Yes Number of times

5. Have you visited Manang before? No Yes Number of times

6. How did you learn about Manang:

From guidebook/ travel agency / magazine article / friend / other

7. How did you make your travel arrangements to Nepal?

a. Independently b. Travel agent (please name)
c. Other, please specify

8. How did you make your trekking arrangements to Manang?

a. Independently b. Kathmandu or Pokhara trekking agent (please name)
c. Agent outside Nepal (please name)

9. If you have a guide with you, please specify:

a. Nepali or Foreigner/nationality of guide:
b. Provided by agent:

- c. Hired independently:
- d. Guide hired from/place:

Your rating of services rendered by guide:

Knowledge of natural environment & wildlife	excellent	good	satisfactory	Unsatisfactory	poor
Knowledge of local culture:	excellent	good	satisfactory	Unsatisfactory	poor
Overall services rendered by guide	excellent	good	satisfactory	Unsatisfactory	poor

10. Please rate your interest/motive for visiting Manang:

Wildlife	Very important	Important	Unimportant	No opinion
Culture				
Landscape				

11. Do you know that Manang is the snow leopard's habitat? YES NO

12. Does the snow leopard's presence increase the appeal of Manang as a destination? YES NO

13. Your rating of local tourism services and experience

Sanitation	excellent	good	satisfactory	unsatisfactory	poor
Food	excellent	good	satisfactory	unsatisfactory	poor
Lodging	excellent	good	satisfactory	unsatisfactory	poor

14. Please rate the following attractions in Manang, on a scale of 1-5 (as below)

Very important = 5
 Important = 4
 Neither important or unimportant = 3
 Unimportant = 2
 Very unimportant = 1

(a) Mountain scenery	1	2	3	4	5
(b) Wilderness/remoteness	1	2	3	4	5
(c) Trekking/physical activity	1	2	3	4	5
(d) Camping	1	2	3	4	5
(e) Wildlife viewing	1	2	3	4	5
(f) Information on the area	1	2	3	4	5
(g) Information on local culture	1	2	3	4	5
(h) Opportunities for meeting local people	1	2	3	4	5
(i) Tourism benefits to local people	1	2	3	4	5
(j) Hiring of local staff	1	2	3	4	5
(k) Guest lodges – variety, availability & quality	1	2	3	4	5
(l) Availability of locally produced vegetables	1	2	3	4	5
(m) Availability of local handicrafts	1	2	3	4	5

15. Which of the following services would you use if they were made available?

- a. Local nature/culture museum

- b. Village tours of (name villages)
- c. Evening cultural programs
- d. Other (please list)

16. Would you take advantage of nature walks if they were available? Yes No

If yes, what would you like to learn about?

- i. variety of birds present
- ii. mammals
- iii. rare wildlife like snow leopard
- iv. flowers, shrubs and trees
- v. geology, glaciers & mountain peaks (landforms)
- vi. local culture & village life
- vii. agriculture and animal husbandry

17. How long should the nature walk or tour be:

- a. 2-3 hours b. 3-5 hours c. all day d. 2-3 days e. longer

18. Which of the following guide services would you use?

- a. guide books and self conducted tours b. nature guide (local villager)
- c. experienced trek guide/leader d. experienced naturalist

19. How much are you willing to pay for these services? Please write in US\$ or Nepali Rs.

- | • Entrance fee for museum | Minimum | Maximum cost |
|------------------------------|---------|--------------|
| • Village tour (1½ hours) | | |
| • Village tour (½ day) | | |
| • Cultural evening programme | | |
| • Nature walk (2-3 hours) | | |
| • Nature walk (1 day) | | |
| • Nature trek (several days) | | |

20. Please estimate the amount of money (US\$ or Nepali Rs) per day (besides your travel package) you are spending on this trek:

- Food/beverages
- Souvenirs
- Accommodation (if not on travel package)
- Trekking Guide
- Other

21. Please specify the number of days you will spend in total on this trek.

Thank you for your cooperation in completing this questionnaire!