Evaluation of Ecotourism (Focus on Village Home stays and Campsites)

April 2018

Thimphu: Bhutan
EVALUATION OF ECOTOURISM
(FOCUS ON HOMESTAYS AND CHAMPSITES)

Gross National Happiness Commission Secretariat

April 2018
ACKNOWLEDGEMENTS

This study on the Evaluation of Ecotourism Programme has been prepared by Norlha Engineering and Management consultancy through Gross National Happiness Commission (GNHC). The evaluation has been carried out to assess ecotourism impact on the livelihood of the local communities and its contribution to the conservation of environment and culture. The results of the evaluation shall be useful for planning and making corrective measures towards implementation of eco-tourism programmes.

The project attempts to evaluate on its contribution in improving the livelihood of the rural people through holistic, community-driven and participatory approaches in the implementation of the ecotourism programme. This report is the outcome of the literature review, consultation meetings and surveys carried out in Paro, Haa, Wangdue, Bumthang, Lhuntse, Zhemgang and Trashi Yangtse Dzongkhags.

We would like to acknowledge all the individuals and agencies involved in the preparation of this report. Specifically, we are thankful to GNHC and the Evaluation Reference Group formed by GNHC through involvement of relevant stakeholders. We would specifically thank Mr. Tek Bahadur Khatiwara, Association of Bhutanese Tour Operators for providing consistent efforts in guiding the field consultations along with relevant documents. We would also like to thank Mr. Sonam Tobgyel, Deputy Chief, Research and Environment Division, Gross National Happiness Commission for coordination and organization of all the discussion forums and meetings throughout the study period.

We would also like to thank members involved in the field survey and consultation such as officials from relevant organizations in the districts, local government officials and all the individuals involved in the survey.

The cooperation and support provided by all the individuals and agencies are highly appreciated.
Contents

Acronyms ........................................................................................................................................ 4

1. INTRODUCTION .................................................................................................................. 5
   1.1 Background ........................................................................................................................... 5
   1.2 Understanding Ecotourism ................................................................................................... 6

2. EVALUATION PURPOSE, OBJECTIVE AND SCOPE...................................................... 6
   2.1 Evaluation Purpose ............................................................................................................... 6
   2.2 Evaluation Objective ............................................................................................................. 6
   2.3 Evaluation Scope .................................................................................................................. 7

3. METHODOLOGY ................................................................................................................. 7
   3.1 General Methodology ........................................................................................................... 7
   3.2 Evaluation Process ................................................................................................................ 8
   3.3 Evaluation Limitations ......................................................................................................... 8
   3.4 Sample Size ........................................................................................................................... 8

4. FINDINGS .............................................................................................................................. 9
   4.1 Respondent Profile ................................................................................................................ 9
   4.2 Details of home stays .......................................................................................................... 10
   4.3 Details of campsites ............................................................................................................ 11
   4.4 Charges ............................................................................................................................... 11
   4.5 Operational aspects ............................................................................................................. 13
   4.6 Impact ................................................................................................................................. 15
   4.7 Conservation of environment and culture ........................................................................... 20
   4.8 Issues, challenges and opportunities ................................................................................... 23
   4.9 Growth trend ....................................................................................................................... 26
   4.10 Geographical and Seasonal spread ................................................................................... 29
   4.11 Other findings ................................................................................................................... 31

5. Recommendations ................................................................................................................. 33

6. Conclusion ............................................................................................................................ 35

7. References ............................................................................................................................. 35

8. Annexure ............................................................................................................................... 36
   8.1 Interview questions .............................................................................................................. 36
   8.2 Questions for Campsites ...................................................................................................... 42
   8.3 Interview Questions to other officials ................................................................................. 47
   8.4 Reference Group .................................................................................................................. 48
Evaluation of Ecotourism

Acronyms

RGoB        Royal Government of Bhutan
TCB         Tourism Council of Bhutan
OECD        Organisation for Economic Co-operation and Development
DAC         Development Assistance Committee
GNHC        Gross National Happiness Commission
ABTO        Association of Bhutanese Tour Operators
NCD         Nature Conservation Division
RSPN        Royal Society for Protection of Nature
1. INTRODUCTION

1.1 Background

Tourism in Bhutan started since 1974 with the objective to generate exchange earnings, show case Bhutan’s unique culture and tradition to the outside world and to contribute to Bhutan’s socio economic development. In due course of time, the tourism industry in Bhutan has seen considerable growth and besides bringing about employment opportunities and other positive impacts, has made significant contributions to the much needed currency generation for the Royal Government. Recognizing its potential for contributing to the socio-economic development of the country and catalyzing broad based growth, the Government has accorded high priority to the tourism industry. Amongst the various initiatives taken by the Royal Government is the project on Accelerating Bhutan’s Socio-economic Development wherein tourism has been identified as an important priority sector. As part of this venture, various development initiatives have been undertaken resulting in Bhutan’s tourism endowments being optimally capitalized upon and the development of an environmentally sustainable, culturally sensitive and socially inclusive tourism in Bhutan.

Tourism sector in Bhutan has witnessed continued growth with 254,704 tourist’s arrival in 2017 which includes regional and internationals arrivals. This is an increase of 21.5% over the previous period. The international arrivals recorded an increase of 14.1% with regional recording 24.9% growth over the previous year. The Royal Government of Bhutan (RGoB) has been following a sustainable middle path approach to tourism of high value low impact in line with the principle of Gross National Happiness in promoting people’s wellbeing, conserving environment and preserving culture and tradition. Such approach has been adopted to safeguard the country’s rich natural and socio-cultural heritage and to control aggressive tourism development. Hence, Tourism Council of Bhutan (TCB) has been instituted as apex tourism regulatory body in the country to ensure that the industry grows in a sustainable manner.

In order to address the various issues impeding tourism development in the country, various new initiatives to diversify tourism attraction base has been undertaken, amongst which the development of Community Based Tourism or Ecotourism is a very significant one. Ecotourism is a form of tourism wherein the local community has substantial control over, and involvement in, its development and management, and a major proportion of the benefits remain within the community. Ecotourism has gained popularity over the past few decades with environmental conservation and socio-economic development, mostly centered around conservation and around protected areas based on a participatory approach to development. Accordingly, various ‘eco-tourism’ products and activities were identified for development (i.e. Black-necked cranes, Hiking, Bird watching, Trout fishing, Health centers, Hot springs, Traditional medicines, Adventure sports, Home stays, Community camp sites on key track routes, Tshechus and festivals).

---

1 Bhutan Tourism Monitor, 2017
2 WWF
3 Community-Based Tourism: a success?
1.2 Understanding Ecotourism

The ‘eco-tourism’ in Bhutan, as provided in the ‘Bhutan National Eco-Tourism Strategy 2001, is defined as: “Styles of tourism that positively enhance the conservation of the environment and/or cultural and religious heritage, and respond to the needs of local communities.” Similarly, ‘Guidelines for Planning and Management for Eco Tourism Development in the Protected Areas Network of Bhutan’ defines ‘eco-tourism’ as: “Responsible travel to natural areas that protects nature and sustains the well-being of local people”.

The ecotourism projects are mostly around protected areas through a participatory approach to development. It is managed and owned by the community, for the community, with the purpose of enabling visitors to increase their awareness and learn about the community and local life. Some of the important attributes of ecotourism are⁴:

a) Benefitting local communities, especially rural people and contributing to their wellbeing and preservation of their culture and environmental assets;
b) Hosting tourists in a local community;
c) Managing a tourism programme by the community;
d) Sharing the profits/benefits fairly among community members;
e) Using a part of the profits/resources for community development and/or to maintain and protect the cultural and environmental community assets;
f) Involving community members in tourism planning, decision making, development and operations;
g) Fostering cross-cultural learning.

2. EVALUATION PURPOSE, OBJECTIVE AND SCOPE

2.1 Evaluation Purpose

The main purpose of evaluating ‘eco-tourism’ programmes is to assess its impact on livelihood of the local communities and its contribution to the conservation of environment and culture. This evaluation shall be useful for planning and making corrective measures towards implementation of eco-tourism programmes.

2.2 Evaluation Objective

The main objectives of the evaluation are:

a) To assess the impact of ‘eco-tourism’ on the conservation of environment and culture.
b) To assess the impact of ‘eco-tourism’ on the livelihood of local communities.
c) To assess the growth trend of the ‘eco-tourism’.
d) To identify ‘eco-tourism’ products and activities with potential for growth.
e) To identify issues, challenges and lessons from the ‘eco-tourism’ sector.
f) To assess the contribution of eco-tourism in addressing geographical and seasonal spread.

⁴ Thailand Community Based Tourism Institute
Evaluation of Ecotourism

2.3 Evaluation Scope

Although there are multiple ‘eco-tourism’ products and services being implemented, the evaluation was focused on the following select ‘eco-tourism’ products:
   a. Village Home-Stays
   b. Community managed camp sites

3. METHODOLOGY

3.1 General Methodology

The evaluation has been carried out as per the Development Evaluation Protocol and Guidelines 2017, Gross National Happiness Commission, RGOB and is also guided by the OECD/DAC standard guidelines. The key criteria used for the evaluation are impact of ecotourism to the livelihood of the communities, improvement in the conservation of environment and culture, issues, challenges and opportunities of ecotourism, growth trend of ecotourism, and then geographical and seasonal spread of ecotourism.

The evaluation adopted a consultative, participatory and adaptive approach that included both qualitative and quantitative methods. To ensure that a wide array of perspectives, views and opinions on results of the programme were obtained, detailed field survey was carried out with all the beneficiaries of home stays and campsite operators including those of local leaders and other relevant stakeholders. In particular, it entailed close coordination and consultation with the Evaluation Reference Group formed by GNHC with members from relevant agencies such as ABTO, TCB and NCD that provided technical guidance and inputs throughout the evaluation process.

Additionally, this evaluation entailed a thorough review of the various relevant project documents; field data collection and verification and validation of the data and information collected; integrating various cross cutting themes such as promotion of environment and culture, capacity building opportunities, issues and challenges, and collating lessons learned, case studies and unplanned results. The key findings of the evaluation were consolidated and documented and shared with relevant stakeholders for comments and feedback before being finalized.

![Mixed Method Data Collection Diagram]

Fig 1: Mixed method data collection
3.2 Evaluation Process

The evaluation process commenced with the constitution of the evaluation team followed by conducting of desk review of relevant documents and key stakeholder consultation. Accordingly, an inception report was prepared and subsequently discussed with the Evaluation Reference Group to finalize on the evaluation methodology including sample size and survey questionnaires. Once the methodology and survey questions were finalized, field team for actual survey was mobilized into three groups to cover all the areas identified in eight Dzongkhags within a short period of 2 weeks.

The sample size and the sites were selected in consultation with the GNHC and the reference group. In all these sites, discussions were held with the beneficiaries to gather information about the program impacts on their livelihoods. This was followed by individual interviews using a structured questionnaire. Interviewees were selected using a stratified random sampling method to guarantee representation of gender, new and old home stays, representation from major regions etc. Where there were few beneficiaries, all of them were interviewed. Then the data collected from the field through questionnaire surveys were compiled into an excel database, cleaned, and analyzed using both Excel and STATA to ascertain changes and impacts in the livelihoods of the beneficiaries. The outcomes from the analysis, consultations and review of documents were compiled and further deliberated in the meetings and then accordingly finalized.

3.3 Evaluation Limitations

The evaluation has a limitation due to lack of proper documentation of design changes at the time of formulating the program including a clear and detailed logical framework. This problem was further compounded due to lack of time especially for field surveys and that we had to resort to sampling of sites and respondents. In addition to that the time allotted for evaluation was limited which has restricted further response rate. This has limited the ability to conduct a longitudinal study and restricted the information available to evaluate the achievement of outcomes.

3.4 Sample Size

The sample size for the actual survey was randomly selected based on the geographical location of the home stays, distribution of new and old establishments, and equivalent representation from each of the localities in the Dzongkhag as well as gender distribution. So out of 117 registered home stays spread across 11 Dzongkhags, 49 samples were taken into consideration covering 7 Dzongkhags. In addition to that 1 home stay and 3 eco-lodges from Zhemgang Dzongkhag was also included in the sample which are not included within the registered homestay list considering the geographical spread. This makes the total sample size to 53, covering 8 Dzongkhags. Further, campsite of Jomolhari Trek and Nubje-Korphu Trek were taken into consideration for the purpose of this study.
Evaluation of Ecotourism

<table>
<thead>
<tr>
<th>Dzongkhags</th>
<th>Sample</th>
<th>Respondents</th>
<th>Response rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zhemgang</td>
<td>4</td>
<td>4</td>
<td>100%</td>
</tr>
<tr>
<td>Bumthang</td>
<td>7</td>
<td>5</td>
<td>71%</td>
</tr>
<tr>
<td>Lhuntse</td>
<td>8</td>
<td>7</td>
<td>88%</td>
</tr>
<tr>
<td>T/yangtse</td>
<td>5</td>
<td>2</td>
<td>40%</td>
</tr>
<tr>
<td>Paro</td>
<td>6</td>
<td>6</td>
<td>100%</td>
</tr>
<tr>
<td>Haa</td>
<td>10</td>
<td>10</td>
<td>100%</td>
</tr>
<tr>
<td>Wangdue</td>
<td>10</td>
<td>10</td>
<td>100%</td>
</tr>
<tr>
<td>Thimphu</td>
<td>3</td>
<td>2</td>
<td>67%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>53</strong></td>
<td><strong>46</strong></td>
<td><strong>83%</strong></td>
</tr>
</tbody>
</table>

Table 1: Survey sample and respondents

4. FINDINGS

4.1 Respondent Profile

The survey respondents from each of the selected Dzongkhags composed of both male and female home stay operators. It is found that majority of the home stay operators are female. This represents contribution of women in the household decision making and their role in entertaining the guests with all types of household arrangements.

On the basis of education level of the home stay operators, 74% of them are without any basic education, 11% have attended high school level, 4% below high school level, 9% NFE and 2% graduate. So this clearly indicates that there are some communication problems with the visitors and always there is need of interpreters while communicating with the visitors. Similarly, in the case of camp sites, those with high school levels are taking the lead in the operations of the campsites.
4.2 Details of home stays

The home stays provide experiences to the visitor as per the real life of the villages. The product entails living with a family to experience and learn about the way of life of local people including overnight stay in the households, local food and drinks, interaction with family members, and participation in daily household chores such as cooking, milking of cow, making butter, cheese, feed livestock etc. Depending on the season, visitors may also have the opportunity to participate in gardening and farm activities including crop plantation, harvesting etc. Some of the home stays have hot stone bath facility that entails bathing in traditional wooden tub with water and herbs. The water in the tub is heated from burning stones.

As per the establishment of the home stays and its operational experience, there is one home stay in Thimphu and in Paro which have been operating for the last 15 years followed by those existed 6-8 years of operation in Wangdue, Haa, Bumthang, Lhuntse and Trashiyangtse and the rest are less than 5 years old.

In terms of the capacity to accommodate visitors, the larger groups of about 15-20 people can be accommodated by some of the home stays in Zhemgang, Bumthang and Lhuntse. However, majority of the home stays, can accommodate around 6-7 people (46%) in almost all the Dzongkhags. Also, there are few home stays which can just cater to less than 5 people such as in the case of Haa and Wangdue.
4.3 Details of campsites

**Nubji-Korphu Trek:** This is a one week trek which offers a short, easy and enjoyable journey around scenic beauty of Trongsa Dzongkhag with warm and pleasant climate along the trail running between 1000-1500m. There is a wide array of flora and fauna observable along the route including the rare Golden Langur, Red Pandas, Himalayan Black Bears, Rhesus Monkeys, Rufous-necked Hornbills and Clouded Leopards. Hikers on this trek have plenty of opportunity to experience traditional rural life as they spend nights in the villages of Nabji, Korphu and Nyimshong. About five campsites with basic amenities (camping ground, kitchen, serving shed, wash rooms, water supply, waste disposal pit, solar light) and improved trail connecting campsites were established. The Nabji-Korphu Trail was officially opened in November 2006. The peak visitation time is during winter and the early weeks of spring (November-April). A maximum number of 11 people per tour group are permitted on the trek.

**Jomolhari Trek:** This is a most popular trekking route at an altitude of 2,500m to 5,000m and it offers a wide range of landscapes, fauna and flora. Trekkers can pass through thick pine forests, scattered hamlets and alpine meadows that lead to the high pastureland where yak herders graze their animals. It includes fabulous views of snow-capped mountains such as Mt. Jomolhari and Mt. Jichu Drake and camping overnight at the base of Mt Jomolhari (Jangothang).

As per the field survey, the selected campsite operator has operational experiences of 4 years for both Nubje-Korphu and Jomolhari treks. They have the capacity to cater to 16 people to be accommodated in the campsites.

4.4 Charges

The charge for the home stays per night per bed varies from individual households and it ranges from Nu.500 to Nu. 3000. The charge also depends on the facility provided by the home stays operators to the visitors and the services. Accordingly, it is found that there is one eco-lodge in Zhemgang which charges Nu.3000 and three home-stays in Lhuntse and one in Paro charging above Nu.2000. These are the few home stays (11%) charging higher rates compared to all others. The lowest rates are in Paro and Lhuntse of about Nu. 500. So the rest 89% of the home stay rates are in the range of Nu.500 to Nu.1000. All these rates include breakfast specially meant for the international visitors while there are different charges for the locals. Compared to all the Dzongkhags, it is found that the charges are reasonable and affordable for home stays in Phobjikha and Haa.

<table>
<thead>
<tr>
<th>Location</th>
<th>Nu.3000</th>
<th>Nu.2500</th>
<th>Nu.2000</th>
<th>Nu.1500</th>
<th>Nu.1000</th>
<th>Nu.900</th>
<th>Nu.850</th>
<th>Nu.800</th>
<th>Nu.750</th>
<th>Nu.700</th>
<th>Nu.600</th>
<th>Nu.500</th>
<th>Nu.350</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zhemgang</td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bumthang</td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lhuntse</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>T/Yangtse</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Paro</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ha</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wangdue</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Thimphu</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

Table 2: Different rates of home stays as per location
Overall, there are different rates offered by different home stays for local visitors and international visitors. For example, take the case of Phobjikha in Wangdue, the charges for local visitor is Nu.250 per night per bed and to the international visitor, it is Nu.700 per night per bed. This is taking into account of only the bed nights with separate charges for other facilities, the details are shown below.

<table>
<thead>
<tr>
<th>Products</th>
<th>Service Type</th>
<th>Local Visitor Rate (Nu.)</th>
<th>International Visitor Rate (Nu.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home stays</td>
<td>Accommodation per night</td>
<td>Nu.250</td>
<td>Nu.700</td>
</tr>
<tr>
<td></td>
<td></td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Food &amp; beverages:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Breakfast</td>
<td>Nu.130</td>
<td>Nu.180</td>
</tr>
<tr>
<td></td>
<td></td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Lunch</td>
<td>Nu.190</td>
<td>Nu.300</td>
</tr>
<tr>
<td></td>
<td></td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Dinner</td>
<td>Nu.190</td>
<td>Nu.300</td>
</tr>
<tr>
<td></td>
<td></td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Alcoholic drinks</td>
<td>Nu.100 per bottle</td>
<td>Nu.100 per bottle</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Nu.120 per bottle</td>
<td>Nu.120 per bottle</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local guides</td>
<td>Guide service</td>
<td>Nu.400 per day</td>
<td>Nu.400 per day</td>
</tr>
<tr>
<td></td>
<td></td>
<td>for culture tour</td>
<td>for culture tour</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Nu.500 per day</td>
<td>Nu.500 per day</td>
</tr>
<tr>
<td></td>
<td></td>
<td>for treks</td>
<td>for treks</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Campsites</td>
<td>Space rental</td>
<td>Nu.100</td>
<td>Nu.200</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Nu.5000</td>
<td>Nu.5000</td>
</tr>
<tr>
<td></td>
<td>Bonfire</td>
<td>Nu.350</td>
<td>Nu.500</td>
</tr>
<tr>
<td></td>
<td></td>
<td>NA</td>
<td></td>
</tr>
</tbody>
</table>

Table 3: Segregated charges (Case of Phobjikha, Wangdue)

In the case of campsites, the charges are made usually in groups ranging from Nu.3500 to Nu.5000. This is because in most cases, the trekkers come in groups (pax consists of 7 to 8 people in each group). The other charges provided by the campsites are Porter (25kg) Nu.200, Pony (50kg) Nu.300, village guide Nu.300, Cook Nu.300, Cultural program Nu.1500, Riding
pony Nu. 450, village waiter Nu 200, Dish washer Nu 200, Stone bath Nu.1500, Welcome ceremony Nu.1000 etc. All these charges depend on the facility provided by each of the camp site operators along the treks.

4.5 Operational aspects

Most of the visitors are managed through tour operators and tour guides as responded by 30%, then another 20% of them are using strategies to contact not only the tour operators and tour guides but also personal contacts. Another 13% are using direct contact with the tour operators to manage visitors to the home stays. This shows that only those operators who can manage better networks with the people working in the tourism sector has better opportunity to get maximum number of visitors than those who doesn’t possess such skills.

The home stay services are availed by different groups of people, mostly by the international visitors constituting more than 40%, followed by regional tourist of about 22% and then the private individuals (20%) and government officials (11%). The private individuals are mainly the domestic people who usually go to pilgrimage and trekking purposes while government officials are mostly on tour to different locations across the country. So in absence of hotels in the locality, they avail home stay services.
Evaluation of Ecotourism

In terms of bed nights spent by the visitors, most of them spend shorter durations of 1 to 3 days in the home stays in almost all the locations. In most cases, visitors prefer to spend 2 days as depicted by 48.89% in areas such as Haa, Paro, Wangdue and Zhemgang Dzongkhags. It is also observed that most of the visitors spent their nights in the home stays within the reach of the capital city, Thimphu and the International Airport, Paro.

The visitors received by the home stays varies from place to place and the type of facilities provided by the home stays, as such about 6 Dzongkhags have received 5 to 10 visitors per year and another about 21 to 50 visitors in 5 Dzongkhags. These are the prominent lots received by most of the home stays. There are also few home stays which received more than 400 visitors mainly in the case of Paro and Zhemgang. In the case of Zhemgang, it is mainly due to more regional travelers coming from across the border of Gelephu and Manas and also due to various products available in the region to experience by the visitors.

The campsites of Jomolhari usually get visitors through personal contacts, while that of Nubji-Korphu depends on the tour operators and Dzongkhag administration for reservations. The visitors are mainly regional followed by international visitors and government officials for Nubji-Korphu Trek while it is international for Jomolhari Trek. About 360 visitors have used the campsite of Nubji-Korphu and spent about a day while about 1000 visitors make use of Jomolhari campsite and spends 5 to 6 days to experience the nature along the trek.
Evaluation of Ecotourism

<table>
<thead>
<tr>
<th>Dzongkhag</th>
<th>Average annual visitors occupying home stays</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zhemgang</td>
<td>Ranges from 4 to 415 people</td>
<td>Visitors are fragmented, sometime less than 5 people while in other cases more than 400 people</td>
</tr>
<tr>
<td>Bumthang</td>
<td>Ranges from 6 to 30 people</td>
<td>On the average, there is constant flow of small groups of visitors</td>
</tr>
<tr>
<td>Lhuntse</td>
<td>Ranges from 1 to 95 people</td>
<td>Average visitors are much lesser compared to other Dzongkhags. In some cases, there are only 2-6 people who have visited their home stays in the past 4 years.</td>
</tr>
<tr>
<td>Tyangtse</td>
<td>Ranges from 5 to 10 people</td>
<td>Smaller groups but better than those of Lhuntse</td>
</tr>
<tr>
<td>Paro</td>
<td>Ranges from 8 to 400 people</td>
<td>Turnover is better with every home stay receiving on average about 100 people</td>
</tr>
<tr>
<td>Haa</td>
<td>Ranges from 8 to 40 people</td>
<td>On the average, every home stay are receiving about 30 visitors</td>
</tr>
<tr>
<td>Wangdue</td>
<td>Ranges from 25 to 120 people</td>
<td>Among all the Dzongkhags, home stays in Phobjikha-Gangtey has a good number of visitors, on the average of 70 visitors for every home stay in a year</td>
</tr>
<tr>
<td>Thimphu</td>
<td>Ranges from 30 to 50 people</td>
<td>Comparatively better number of visitors with average 40 people in each home stay</td>
</tr>
</tbody>
</table>

Table 4: Annual average number of visitors occupying the home stays

4.6 Impact

The annual earnings from the home stay ranges from as low as Nu.4,000 in Lhuntse to more than Nu.400,000 in Zhemgang. This is because Lhuntse has lesser visitors compared to Zhemgang which is dominated by the Indian tourist coming from across the border. However, most of the home stays are making annual revenue ranging from Nu. 20,000 to Nu.50,000 as indicated in the table below. The home stays which make highest earnings are located in Zhemgang and Paro Dzongkhags with the annual earning of above Nu. 300,000. This is followed by home stays located in Wangdue, Thimphu and Lhuntse Dzongkhags with annual earnings ranging from Nu.100,000 to Nu.200,000.

Fig 10: Impact of home stays to rural livelihood

Improved family income, preservation of tradition and culture 5%
Improved family income, conservation of environment, tradition and culture 95%
These earnings are made mainly from the bed nights spent by the visitors in the home stays constituting about 57%. This is followed by bed night as well as guide services represented by 23% of the respondents. Then there is also an income generated through bed nights and other services of about 9% such as food, beverages and other facilities in the home stays.

It is found that the income generated through the home stays have helped the community in earning alternative sources of income, witnessed improvement in the preservation of rich tradition and culture and there is also an improvement in the conservation of environment as supported by 95% (as shown in the figure 10 above).

<table>
<thead>
<tr>
<th>Dzongkhag</th>
<th>Average annual income</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zhemgang</td>
<td>Ranges from Nu.20,000 to Nu.400,000</td>
<td>Earnings are skewed towards some while others make lesser amount</td>
</tr>
<tr>
<td>Bumthang</td>
<td>Ranges from Nu. 10,000 to Nu.60,000</td>
<td>On the average, each home stays makes annual income of Nu.30,500</td>
</tr>
<tr>
<td>Lhuntse</td>
<td>Ranges from Nu. 500 to Nu.40,000</td>
<td>Average income is Nu.15,400 by each home stay but there are few who has lesser income with lesser number of visitors</td>
</tr>
<tr>
<td>T/yangtse</td>
<td>Ranges from Nu.15,000 to Nu.20,000</td>
<td>Average earning is Nu.17,500 for each home stay</td>
</tr>
<tr>
<td>Paro</td>
<td>Ranges from Nu.20,000 to Nu.300,000</td>
<td>Average earning is Nu.153,300 for each home stay</td>
</tr>
<tr>
<td>Haa</td>
<td>Ranges from Nu. 7500 to Nu.80,000</td>
<td>On the average, every home stays are makes Nu.32,250 per year</td>
</tr>
<tr>
<td>Wangdue</td>
<td>Ranges from Nu.30,000 to Nu.120,000</td>
<td>On average each home stays makes amount of Nu.67,000, earnings are almost uniform</td>
</tr>
<tr>
<td>Thimphu</td>
<td>Ranges from Nu.50,000 to Nu.150,000</td>
<td>Average is Nu.100,000 but skewed towards few home stays</td>
</tr>
</tbody>
</table>

Table 5: Average annual earnings from home stays
Since the objective of the ecotourism is to benefit the community and to bring about overall impact to the conservation of environment and preservation of tradition and culture, this results supports in fulfilling the objective of the programme. Another 5% supports that there is improvement in the family income and preservation of tradition and culture, while few others are not sure because of problems in managing the home stays.

Similar to home stays, campsites makes an annual gross income of about Nu. 273,000 around the Nubji- Korpuh Trek and Nu. 385,000 to 435,000 along the Jomolhari Trek. The main sources of income through the camp sites are mainly the night holds spent by the visitors including other services such as local guides, porter and pony, cultural programs, stone bath facility and other hospitality and entertainment services provided by the campsite operators. Further, the campsites have also brought about improvement in the conservation of environment, preservation of tradition and culture besides providing additional income towards improving the livelihoods of the community living around the area.

About 59% of the respondents do support that there is benefit to the households in the nearby areas and 41% says that there is no benefit to the surrounding area. This can be due to the fact that most of the home stays are operated by individual households and there is not much of coordination and team work to bring about overall improvement in the community. They also lack proper knowledge about the home stay or camp sites and their benefits. However, there are certain business activities being developed in some of the areas such as sale of local vegetables, locally made handicrafts (including brocades), entertaining with cultural programs to the guest and opening of grocery or bar shops in the locality. This is visible in almost every parts of the country where villages have started selling vegetables along the roadsides, opening of small shops and also venturing into traditional activities such as carving, weaving and other local products which are now available in abundance in the capital city and nearby towns.

The ecotourism program has brought about positive effect to the lives of the people in terms of supplementing their living conditions as supported by 89%. It is also found that there is really an improvement in the lives of the people as supported by 64% (if improved and highly improved is combined). So the impact of ecotourism is present in almost all the areas as can be seen in terms of boosting the economy and business activity of the community, revival of old tradition and
culture such as re-introduction of some of the local festivals, coming up with unique activities and products from each of the communities.

The additional income earned from the home stay operation have resulted in availing household items such as owning of semi concrete houses, TV and other facilities such as purchase of kitchen wares, furniture and other equipments as represented by 42%. The other groups about 25% also supports that it has definitely allowed them to purchase TV and other items. Another group of about 16% was able to manage owning of semi-concrete houses and purchase of TV in the house.

In addition to that, 76% of the respondents support that the earnings from the home stays have resulted in supporting the children to go to school. Others about 24% says that it didn’t provide much support from the earning for school going children. This can be because they are using income from the home stays for other purposes or they must be having other arrangements to support their children to go to school. However, there is positive impact in supplementing the lives of the people in various ways through the additional income derived from the home stay services.
About 80% of the home stay operators got opportunity to attend various trainings related to home stays operation and management. Accordingly, 41% of them were able to attend training on home stay management, 37% have attended all types of training on home stay related trainings, 12% attended home stay and other management techniques, 6% have attended training on home stay management, conservation of environment, waste management, sanitation & hygiene, home stay products & services and other related trainings. So everyone seems to have participated in certain trainings in one way or the other related to ecotourism activities.

In the case of camp sites also, there is benefit to the nearby areas in terms of business development such as sale of vegetables or fruits and handicrafts. It has also provided employment opportunities in terms of guides and catering services in the camp sites. There is already improvement in the developments taking place around the camp sites in terms of facilities, infrastructures and services. All these have lead to overall improvement in the living conditions of the rural people.
4.7 Conservation of environment and culture

It is found that 98% of the home stays are using exclusive traditional products such as local vegetables, food products and fruits including locally available furniture, utensils and household items to promote and preserve tradition and culture. This is a significant impact of ecotourism to bring about preservation of culture when the country and the global world is facing challenges in maintaining the culture due to developments taking place in the world.

About 69% of them are using locally manufactured items in the home stays such as utensils, furniture, local food and other items which are available locally in the operation of the home stays. In other words, 94% of them are using locally available products when we combine all products used by 67% and 27% using utensils, furniture and food items, which basically means they are using all sorts of traditional items to preserve and promote traditional culture.

Further, the visitors are given treatment on the basis of rich traditional culture in a Bhutanese way. So about 33% of the respondents do provide treatment in terms of receiving the visitors in traditional way such as offering of khaddar, simple offer of marching and other offers, followed by showing of cultural programs, involvement in cooking and farming activities, and treating like own family in the house (as shown in figure 22). So almost all the home stays do provide similar treatments but some of them are not able to provide cultural programs and involvement of the visitors in cooking or farming activities. However on the average almost all the home stays are treating the visitors in our own traditional customs so as to promote our rich tradition and culture to the outside world.

Further to enhance the capacity of the home stay operators towards conservation of environment, various trainings were provided. Accordingly, 47% of them got an opportunity to attend environment related trainings while 53% of them didn’t get such opportunities. Specifically, 34% of them have attended training on prevention of forest fire, 25% on waste management, 22% on preservation of forest, 13% on water source conservation and 6% on sanitation and hygiene practices (refer figure 24). It is observed that there is impact on the conservation of environment such as taking different roles by the community towards conservation and preservation of natural environment.
As part of the government initiatives towards improving the livelihood and standards of living in the rural homes, electricity is given priority towards cleaner use and also to substitute firewood consumption towards maintaining 60% forest cover at all times. However, in the case of home stays, 93% are still using firewood for the purpose of heating especially during the cold winter months. This can be because of the fact that home stays are supposed to be using traditional products and to showcase old traditional methods of heating. So one way of heating homes as per the tradition which is widely used by majority of the people even now is to use Bukharis (heating appliance) during the cold winter months. So the increasing use of firewood for the heating purpose can be attributed mainly because of all these traditional methods. Further, almost all the home stays are located in some of the coldest places except few in some areas. This is supported by 52% of the respondents where they have mentioned that the consumption of firewood is increasing year by year.
In addition to that various activities were undertaken by the community to conserve environment and culture such as promotion of local food items in the home stays by 32% (completely local items), 31% have proper waste management in place, 12% show case cultural programs for promotion of tradition and culture, 10% allows visitors to attend local festivals, 8% engage in water source preservation and community forest preservation activities. This also supports the fact that various initiatives and activities are already in place to conserve environment and culture.
Besides the normal electricity usage, other energy sources such as LPG and biogas for cooking, solar for lighting and others like fire wood in most cases for heating are most common. The presence of firewood and other heating purposes as represented by others category is depicted in Wangdue (Phobjikha), Bumthang, Paro, Haa, Lhuntse and Thimphu where home stays are mostly located in the colder places.

Similar to the home stays, campsites are also using local products such as utensils and local food items to serve the guest in a most traditional way. They also provide homely environment to the guests by treating them with warm welcome in traditional Bhutanese way, showing cultural programs and involving them in cooking activities. On the other hand, firewood is being used for bonfires for heating purposes since the campsites are mostly located at the higher altitudes which are comparatively colder than other places. The firewood is also used in some cases for cooking purposes in the campsites.

4.8 Issues, challenges and opportunities

There are certain issues in operation, management and overall performance of the home stays as supported by 52%, while 48% of them don’t face any problems. It is found that there are general issues like frequent interruption of electricity mainly in the Phobjikha valley which affects smooth functioning of the home stays especially during the time of engagement of the guests. Some of the other issues are bills not being cleared on time by some of the tour operators. This is faced by some of the home stays in Haa and Paro. In some cases, they also face problem due to lack of helpers to assist especially those operated by old age or single family members. The incidences such as difficulty in managing the guest, proper handling of household chores, hospitality and entertainment of guest are some of the problems faced due to lack of adequate people. It was also pointed out that there are challenges in getting the visitors to some of the home stays (i.e. absence of equal or uniform distribution of visitors within the same locality).

Fig 29: Is there any issues or challenges in home stay operation?

Fig 30: General issues faced by home stay operators
The other specific issues faced by the home stays are on the front of coordination problems with the tour operators as supported by 61%. The coordination issues are mainly faced in terms of reservations and non-payment of bills on time by the tour operators after the facility has been used by the visitors. The other respondents have issues with tour guides and tour operators as supported by 25%. One of the major issues faced is that of coordination between visitors and the home stay owners such as lack of facilitation to assist the home stay owners since they do face communication barriers as most of them are uneducated. It is also the guide who takes care of most of the reservations, so when some home stay owners are known to the guides; they get maximum number of visitors than the ones who don’t have such connections. The other coordination issues are those of Dzongkhag administration and Gewog administrations.

There are also certain challenges faced by some of the home stays although 78% of them are managing efficiently but 9% of them are facing difficulty to adjust with the visitors in terms of communication and not able to provide anticipated services due to lack of helpers. Another 9% are facing difficulty to run the home stays in addition to usual farm activities which is the key component of the rural homes. Another 4% are also having problems in managing the home stays due to lack of proper knowledge and management skills.
Majority of the home stays have not availed any loans from the financial institutions during their establishment but there are few of them constituting about 11% who have taken loans from the financial institutions. So as per their experience, there is difficulty in availing the loans from the financial institutes with lot of criteria that needs to be fulfilled while processing the loan.

![Fig 33: Loan accessibility to those who availed loans](image)

The major operational challenges faced are competition among the home stays and absence of uniform rate represented by 25%. This is followed by those groups of home stays operators who face competition from hoteliers and competition among home stays by 19%. Further 14% of them face difficulty in getting the visitors. So in one way or the other, there are difficulties faced by almost all the home stays.

![Fig 34: Challenges in Operation of the home stays](image)

<table>
<thead>
<tr>
<th>Service</th>
<th>Preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Showcase of local products</td>
<td>22%</td>
</tr>
<tr>
<td>Weaving activities</td>
<td>6%</td>
</tr>
<tr>
<td>Cultural program</td>
<td>6%</td>
</tr>
<tr>
<td>Hot stone bath</td>
<td>9%</td>
</tr>
<tr>
<td>Trekking</td>
<td>6%</td>
</tr>
<tr>
<td>Handicraft shops</td>
<td>34%</td>
</tr>
<tr>
<td>Traditional games &amp; sports</td>
<td>6%</td>
</tr>
<tr>
<td>Village cultural tour</td>
<td>9%</td>
</tr>
</tbody>
</table>

![Fig 35: Preference of other products or services to be included with the home stays](image)
Besides the normal facilities provided by the home stays, there are other products or services which can be included within the same scope. Opening of small handicraft shops is one option as supported by 34%, show casing of other local products 22%, providing village tours 9% and having hot stone bath facility within the home stays 9%. The other products or services which can be included are weaving activities, cultural programs, trekking facilities and traditional games and sports so that visitors can actually feel and experience these activities.

So with the developments taking place in the home stay operations, there are other opportunities in future to enhance priority activities such as growth in the vegetable marketing (21%) followed by handicraft marketing, improving farming activities and promotion of cultural activities by 14%. This is followed by creation of employment and business opportunities through promotion of weaving and cooking activities, and also revival of rich cultural programmes such as local festivals and events.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Handicraft market</td>
<td>14%</td>
</tr>
<tr>
<td>Vegetable market</td>
<td>21%</td>
</tr>
<tr>
<td>Employment &amp; business</td>
<td>10%</td>
</tr>
<tr>
<td>Festivals</td>
<td>7%</td>
</tr>
<tr>
<td>Farming activities</td>
<td>14%</td>
</tr>
<tr>
<td>Cooking activities</td>
<td>10%</td>
</tr>
<tr>
<td>Weaving activities</td>
<td>10%</td>
</tr>
<tr>
<td>Cultural activities</td>
<td>14%</td>
</tr>
</tbody>
</table>

Fig 36: Opportunity for various types of developments within the vicinity of the home stays

In the campsites also, there are issues and challenges faced during the operation, such as coordination problem with the tour operators, Dzongkhag administration and Gewog administration. There is also a problem for issuance of permit from the Assam side for the regional tourist to Zhemgang area. There are also cases of competition among the camp site operators and not able to get visitors in some of the campsites.

4.9 Growth trend

The operation of home stays have witnessed an increasing trend over the years as supported by 51% and there are many others showing interest to establish new home stays (36%). However, there are about 10% of those who want to convert home stays to original house due to limited number of visitors and also difficulty in managing the home stays since they are operated by single family members.
In terms of growth of the home stays, there is increasing trend in almost all the Dzongkhags with the highest growth recorded in Paro by 25%, followed by Lhuntse 23%, Wangdue 20%, Bumthang 15% and Haa 13%. Other Dzongkhags like Zhemgang and T/Yangtse have also witnessed steady growth of 3% over the years.

This is supported by the total number of home stays shown in the figure below consisting of 117 home stays spread across the country. Out of which, Wangdue has the highest of 28 home stays followed by Haa 23, Lhuntse 19 and Bumthang 14. Rest of the Dzongkhags range from 3 to 9 home stays while Monggar and Trashigang have one each.
The home stay establishments are increasing with the increase of visitor arrivals in different parts of the country as perceived by 67% of the home stay operators. While 17% feels decreasing trend or same due to less visitor arrivals in their place based on certain factors. The less turnover is because of the farm roads connected to most of the farm houses which is preferable by the visitors but those away from road connectivity are lagging behind. The other reasons are due to operational issues and not able to handle the home stays properly by the operators. 

The increasing trend is also witnessed in terms of average number of tourist occupying the home stays over the years (comparison of 2016 and 2017 figures shown below). Increase is more in the case of Paro being closer to Airport and Zhemgang being closer to Indian border which are the major visitors in the region.

In terms of annual average income trends of home stays, there is positive trend in almost all the Dzongkhags. The highest annual income recorded for Zhemgang by the home stay or eco-lodges are on the average of Nu. 250,000 in 2017 from Nu.196,000 in 2016. The income is higher in Zemgang because it is dominated by the regional tourism in addition to farmhouse and eco-lodge charges comparatively higher than rest of home stays in the country. Similarly, home stays in Paro make an income of Nu. 152,000 in 2017 from Nu.124,000 in 2016.
In the camp sites also, there is similar trend of increasing the campsite operators along the successful treks and many are forth coming to support camp site operation. In terms of visitors, there is definitely increased of camp site users as in the case of Nubji-Korphu Trek from 160 in 2016 to 240 in 2017. Same is the case with the Jomolhari Trek from about 500 people in 2016 to 800-1000 person in 2017.

4.10 Geographical and Seasonal spread

Overall, the tourist arrivals are spread across all the Dzongkhags with Thimphu and Paro having almost equal number of visitors about 27.5% and 26.4% respectively. It is followed by Punakha proportioning about 23.1%. However, visitor arrivals are skewed towards western Dzongkhags compared to rest of the Dzongkhags in the other regions.
The visitor arrivals on the basis of months, it is the April and October month which has the highest number of visitors arriving in the country followed by November, September, August, June, December and March. However, overall there are certain numbers of visitors throughout the year visiting Bhutan.

In general, visitors tend to prefer spring (April, May and June) and autumn (September, October, November and December) season as depicted in the figure above. Similarly, in the case of home stays and campsites, most visitors prefer during the months of January to April and October to December. During the other months, it is only Haa, Bumthang and Lhuntse which receives sparingly smaller quantity of visitors.

<table>
<thead>
<tr>
<th></th>
<th>Jan</th>
<th>Feb</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
<th>Aug</th>
<th>Sept</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zhemgang</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bumthang</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lhuntse</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>T/ Yangtse</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Paro</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Haa</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wangdue</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Thimphu</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 6: Months receiving highest visitors as per field survey

In terms of accessibility of the home stays, 29% are easily assessable, which means being located within the reach of motorable peace road while 58% accessible through connection by newly constructed farm roads. So overall, 82% of the home stays are accessible by road and the remaining 18% are not easily accessible and need to travel some distance from the nearest road point.
On the average, home stays in Paro receives the highest number of visitors of about 117 during the peak season and 44 during off peak. Similarly, Zhemgang receives 81 in peak and 46 in off peak seasons, followed by Wangdue, Thimphu and Haa.

Campsites are easily accessible because it is meant for night halts during the trekking period. Further, most of the visitors are dependent on the trekking season and it is natural that there will be more visitors during the peak season. Thus about 240 visitors have availed the services of campsites around Nubji-Korbu Trek and about 1000 visitors along Jomolhari Trek.

4.11 Other findings

Following are some of the other findings from the study:

a) One of the home stay in Lhuntse have not received even a single visitor since its establishment due to far off from the road point and lack of network with the tour operators and guide. The other factors contributing to low turnover is because of absence of transportation or taxi facility in the locality, bad road conditions in the summer season and thick forests.
b) In the case of one home stay in Paro, there is good number of tourist (around 800 visitors during peak season and 200 during off peak season) because the operator has a good network among tour guides and tour operators.

c) Although waste has been managed properly in most of the locations, still there are problems in some of the locations both for campsite as well as along paths towards home stays in Paro and in Phobjikha (for example).

d) Phobjikha has a committee to decide on the distribution of visitors across all levels of home stays, which is lacking in other parts of the country. Thus some of them land up without visitors at all throughout the year.

e) Along the campsites, porter and pony are being introduced to provide better services to the visitors but in reality, there is problem of reliable service and also abnormal rates charged by the operators.

f) The main objective of the ecotourism programme is to bring about conservation of environment, reduce poverty and to meet the basic necessities from the ecotourism earnings. However, most of the agencies being involved are not able to understand the purpose and the objectives which led to sustainability issues in the project.

g) In the case of Nubji-Korphu, community is too dependent on the government and wait for the government to take everything in the community. There is little initiatives undertaken by the community themselves for long term sustainability of the programme.

h) One of the factors which impeded development of Nubji-Korphu Trek is due to recent development of farm roads connecting all places in the locality. So with the farm roads, there is no need of trek route because visitors can easily travel by cars and spent less number of days in the community.

i) The trained local guides existing in the community are leaving the profession for better opportunities which creates a gap in the system.

j) Since almost all the home stays and campsites are operated by the farmers, their main activity is to carry out farming and ecotourism activity is just the additional activity. So only during the non-farming period, they focus on the tourism aspects while on other times, they are engaged in agriculture.

k) The program involves various stakeholders in the implementation of different ecotourism related activities in different parts of the country. So individual agencies take up different projects without the serious engagement of other sectors. Thus leading to coordination problem among the stakeholders.

l) There is no proper coordination among the community and the tour operators in terms of accessibility and market. As such there is no proper channeling of booking for home stays and the campsites.

m) There are certain management issues being faced by the people involved in the field for successful implementation of the ecotourism products.
5. Recommendations

Advocacy and awareness: It is found that there has been communication gap between the local communities and the project implementers in the past. To avoid any misunderstanding and miscommunication between the local community and the stakeholders, there is need to conduct awareness and consultation meetings with the local communities frequently. There is also a need to create awareness and familiarization on the objectives of the ecotourism and its benefits among the tour operators and guides in Bhutan.

Strengthen stakeholders’ partnership: There are number of stakeholders being involved in the ecotourism related product development and many are showing interest in the development of ecotourism products. So it is necessary to complement the efforts made by those parties and continue to maintain the network amongst those involved in the development of ecotourism products and services in the decision making forums and discussions. Major stakeholders involved in the ecotourism products or services are TCB, RSPN, Park Services (Department of Forest), respective Dzongkhag administrations, NCD etc.

Capacity Building: Apart from the skills related to eco-tourism project management, trainings to develop and cater ecotourism products and services, there is a need to develop the capacity of the local communities and stakeholders involved in the ecotourism such as in terms of ecotourism marketing, promotion and maintaining consistency of communication among the beneficiaries.

Develop promotion materials: Currently there are no promotion materials about ecotourism in Bhutan except some brochures and online materials. For example some local festivals and uniqueness of some of the places do not have any promotional or an information brochure. Therefore, there is a need to develop promotional materials like websites, pamphlets/brochures, and videos on ecotourism products and make it available online.

Promotion of tradition, culture and local festivals: There is need of a mechanism to improve the role of the stakeholders in coordinating, preparing and organizing the ecotourism products and services. There could be more creative programs with hands on activities instead of just having display of culture, crafts, biodiversity and cuisines. For example, people can take part in all types of activities related to promotion and development of tradition, culture and local festivals in the community.

Product diversification: To address the issue of limited product diversity it is advisable to go beyond the conventional idea of ecotourism products development. As highlighted in the findings, there are opportunities to include other products and services such as cooking and weaving activities, handicraft products, local items and other services within the home stays.

Uniformity in rates: At the present situation, different rates are charged by different home stays and campsites, so if standard rates are fixed based on certain criteria, then it would immensely benefit visitors as well as the operators. So proper rate fixation need to be carried out in order to bring about efficiency in the operation of campsites and home stays.

Common information system: At the present scenario, reservations are carried out at different levels and visitors are routed mostly through personal contacts, tour operators and guides. So there is need to develop a common information system consisting of all the features of homes
and campsites across the country including rates. In that way, visitors can go through the detailed information and make their reservations as per their preference.

**Enhance waste management system:** To improve community responsibility in waste management, there should be a mechanism to instigate their sense of territorial ownership. Campaigns and waste collection system should be organized where communities themselves are made to take part in the waste collection. They should also appoint focal persons responsible for addressing these issues. Action plan needs to be developed based on the stakeholders meetings.

**Enhance communication:** Since most of the operators are uneducated, it is necessary to involve tour guides to carry out the interpreters between the home stay operators and the visitors. The tour guides can also assist in proper management of the home stays during their stay in the specific locations.

**Solving manpower problem:** To improve the services rendered to the visitors through home stays, it is necessary that the home stays should have adequate people in managing the guests. So regulators and the concerned stakeholders need to come up measures to solve such problems through frequent monitoring and assessment.

**Alternative sources of energy:** In most of the home stays, there is increasing usage of fire woods for heating purposes. This can be controlled if alternative sources of heating were put in place. So there is need of exploring alternative method of heating in the home stays which is cleaner, safer and serves the purposes.

**Monitoring and Evaluation:** There is need of proper monitoring and evaluation of all the ecotourism projects or programmes on regular basis so that everything is in line with the objectives of the program. The central coordinating agencies involved in the projects need to ensure that the results achieve are in line with the objectives of the programmes or projects through proper monitoring and evaluation.

**Campsite Management:** Although, campsites have been identified and distributed among the operators but in actual implementation, there is haphazard arrangement of camps at the designated sites (i.e. whoever comes first gets best location for the camps). This leads to misunderstanding and problems at site among the operators in presence of the visitors. So, proper mechanism needs to be put in place to address this issue.

**Regulations and plans:** All the Dzongkhags should have ecotourism master plans, regulations or guidelines in place for proper management and operation of ecotourism products and services.

**Accessibility:** In the case of Zhemgang, there is issue on the access and permit of regional tourist coming from Manas side but there is no proper entrance. So alternative entrance from that side needs to be explored and implemented to improve flow of tourist towards Zhemgang.

**Attract local tourist:** There are limited number of local visitors using the home stay and campsite facilities at the present scenario. So in order to attract more local visitors, there is need to create awareness among the people within the country about the availability of such facilities in specific locations including specific features and attractions.
6. Conclusion

Ecotourism has been recognized as a means of development whereby the social, environment and economic needs of local communities are met by offering ecotourism products and resources. The results from this study provides some valuable information which can be useful for planning and to take concrete decisions on the initiatives aimed for increasing ecotourism products and services that would benefit the local communities across the country.

Some of the places like Lhuntse, Zhemgang, Bumthang and Trashi Yangtse provide unique opportunities to the visitors due to availability of unique culture, traditions, rich biodiversity and culture sites of historical importance. All these places should be targeted to be developed as a unique destination that becomes a must visit place for tourists. The few existing established ecotourism products and facilities available in these regions are limited by smaller groups of tourists visiting these regions due to various factors. The factors such as bad road conditions, remoteness of the places, limited facilities available and other products deters visitors coming to visit these places. However, considering the current development trends and government initiatives, there is opportunity to increase the visitors by exploring more facilities and development of other products and services. There is also need of creating more awareness among the community as well as the implementing partners on the potential of ecotourism in these areas. Similar developments can be also explored in the southern regions in order to ensure equal distribution and spread of the visitors towards enhancing the economic and social lives of the people living in the southern areas.

It has to be kept in mind that the participation of the stakeholders and the local communities for such initiatives comes with expectations which can be diverse in nature. It is important to measure net benefits of the ecotourism initiative, and determine whether the community and individual households have benefited by the interventions.

7. References

a) Community Ecotourism in Royal Manas National Park, Department of Forests and Park services, 2011
b) Ecotourism Development Opportunities in WCP: A consultative mission report, ICIMOD
c) Merak Sakteng Impact Assessment Report 2012, Planning and Research Division, TCB
d) Socio Economic Tourism Baseline Survey for Merak-Sakten, TCB
e) Development Evaluation Policy of Bhutan, 2017, GNHC
g) Guidelines for Planning and Management, Ecotourism Development in the Protected Areas Network of Bhutan, TCB
h) Needs assessment for community based sustainable tourism in Phibjikha, RSPN
i) Carrying capacity assessment report for Haa and Phobjikha, 2017, RSPN
j) Evaluation Report, Local Governance Support Programme in Bhutan, GNHC
8. Annexure

8.1 Interview questions

Questions for Home stays

Speak to village home stay owners or the developers in the villages. Begin with the following introduction:

Introduce yourself: My name is___________, representing Norlha Engineering and Management Consultancy for the work Evaluation of Ecotourism awarded by Gross National Happiness Commission. We would like to know about the programs implemented for development of ecotourism in the locality where our focus will be on the village home stays and the camp sites. Please feel free to provide us the response as per the questions below. The results of the study will never reveal your name (it will be kept confidential). If okay with you, I would like to ask you a few questions – your opinion is very important to this study. Thank you in advance for helping us with this study.

<table>
<thead>
<tr>
<th>I. Personal Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Name of home stay____________</td>
<td>2. Location____</td>
</tr>
<tr>
<td>3. Gewog________</td>
<td>4. Dzongkhag____________</td>
</tr>
<tr>
<td>5. Operated by____________</td>
<td>6. Level of Education____</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>II. Home stay information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. How long have you been operating this service (Home Stay)? ______</td>
<td></td>
</tr>
<tr>
<td>2. What do you feel about the actual benefits of home stays?</td>
<td></td>
</tr>
<tr>
<td>a) Improved family income</td>
<td></td>
</tr>
<tr>
<td>b) Improved conservation of environment</td>
<td></td>
</tr>
<tr>
<td>c) Improved preservation of tradition and culture</td>
<td></td>
</tr>
<tr>
<td>d) Not much of benefit</td>
<td></td>
</tr>
<tr>
<td>3. How many people can be accommodated in your home stay at once? ______________</td>
<td></td>
</tr>
<tr>
<td>4. What is the average length of stay per tourist in your home stay?______days</td>
<td></td>
</tr>
<tr>
<td>5. In which months you receive the highest number of tourist in your home stay?______</td>
<td></td>
</tr>
<tr>
<td>6. What is the average number of tourist do you receive in a year?______</td>
<td></td>
</tr>
<tr>
<td>7. What is the trend of tourist arrivals in your home stay compared to previous years?</td>
<td></td>
</tr>
<tr>
<td>a) Increasing</td>
<td>b) Decreasing</td>
</tr>
<tr>
<td>c) Same</td>
<td></td>
</tr>
</tbody>
</table>
### Evaluation of Ecotourism

<table>
<thead>
<tr>
<th>Question</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do you get the guests in your home stay?</td>
<td>a) Contact with guides</td>
</tr>
<tr>
<td></td>
<td>b) Contact with tour operators</td>
</tr>
<tr>
<td></td>
<td>c) Contact with Dzongkhag officials</td>
</tr>
<tr>
<td></td>
<td>d) Personal contacts</td>
</tr>
<tr>
<td>What is the rate for home stay per night per bed?</td>
<td>________________</td>
</tr>
</tbody>
</table>

### III. Impact of Ecotourism

1. What is the average annual earnings from the home stay operation? ___________
   What is the trend of income generation over the years? List at least 3-5 years figure ___________

2. What are the sources of income generation through home stays?
   a) Bed night           b) guide service                c) Rental          d) others |

3. Do households in the vicinity benefit? Yes [ ] No [ ]
   If yes, in what form, please specify ________________

4. Is there any business activities grown nearby? Yes [ ] No [ ]
   If yes, then what kind of business and how much do they make in a year ________________

5. What are the employment opportunities created by the home stays? Please list down ______

6. Is there any improvement in the infrastructure of the community after the introduction of home stays? What are they? ________________

7. Is there any community fund generated from the home stays? If so, how is it being used? __________

8. With the earnings from the home stay, are you able to supplement your living conditions? Yes [ ] No [ ]
   If yes, please tick the appropriate facilities availed after the operation of the home stay.
   a) Concrete or semi concrete houses [ ]  b) Own car [ ]
   c) Own TV [ ]  d) Own other facilities [ ]

9. Are you able to support your children to schools from the earnings supplemented by home stays? Yes [ ] No [ ]
   If yes, please rate as below.
   a) Immense support [ ]  b) Moderate support [ ]
   c) Slight support [ ]  d) No support [ ]
Evaluation of Ecotourism

10. Did you receive any form of training for home stay program? Yes ☐ No ☐
   If yes, which areas you were trained.
   a) Home stay management ☐ b) Hospitality ☐
   c) Booking keeping ☐ d) Conservation of environment ☐
   e) Waste management ☐ f) Sanitation and Hygiene ☐
   g) Home stay products and services ☐ h) Others ☐

11. Is there an improvement on the overall living conditions of your family? Please rate as follows:
   a) Highly improved ☐ b) Improved ☐
   c) Little improvement ☐ d) No improvement ☐

IV. Conservation of environment and culture

1. Are you using traditional items and products in the home stay?
   Yes ☐ No ☐
   If yes, please tick the appropriate traditional items being used in the home stay
   a) Utensils ☐ b) Furniture ☐
   c) Local food ☐ d) Other products ☐

2. How do you treat the visitors in terms of tradition and culture? Please tick the appropriate fields below.
   a) Reception as per Bhutanese way ☐ b) Cultural program ☐
   c) Involvement in cooking ☐ d) Involvement in farming ☐
   e) Treat as family and eat together ☐

3. Are you still using firewood for cooking and heating purposes?
   Yes ☐ No ☐
   If yes, please rate the following in terms of firewood consumption.
   a) Same as before ☐ b) Decreasing every year ☐
   c) Increasing every year ☐ d) Almost negligible now ☐

4. How often do you get involved in the community services for managing waste? Please tick the following.
   a) Very frequently ☐ b) Sometimes ☐
   c) Rarely ☐ d) Not at all ☐

5. What activities are being carried out in order to preserve environment and culture?
Evaluation of Ecotourism

6. Did you get an opportunity to attend training/awareness programs on conservation of environment and culture?
   Yes  [ ]  No  [ ]
   If yes, please mention here_______________________

7. What are the systems in place to manage waste? ______________

8. Do you use renewable energy resources?
   Yes  [ ]  No  [ ]
   If yes, please tick the following.
   a) Biogas  [ ]  b) LPG  [ ]
   c) Solar energy  [ ]  d) Others  [ ]

V. Issues, challenges and opportunities
1. Are there any issues or problems in the operation of the home stays? Yes  [ ]  No  [ ]
   If yes, please list here
2. What are the coordination problems do you face? Please check the appropriate ones below.
   a) tour guides  [ ]  b) tour operators  [ ]
   c) Dzongkhag administration  [ ]  d) Gewog administration  [ ]
   e) Among the home stay operators  [ ]
3. What can you say on the overall performance of the home stay management? Please rate them below.
   a) Difficult to manage  [ ]  b) manageable  [ ]
   c) Difficult to adjust with the visitors  [ ]  d) Difficult to run along with farm works  [ ]
   e) Others____________________
4. Did you take any loans from the banks? If so how accessible are the loans from the banks?
   a) Difficult to get loan  [ ]  b) easy to get loan  [ ]
   c) Lot of criteria to fulfil  [ ]  d) Others  [ ]
5. What are the operational difficulties do you face? Please tick below:
   a) Competition from the hoteliers  [ ]  b) Competition among home stays  [ ]
   c) Absence of uniform rate  [ ]  d) Not able to get visitors  [ ]
6. What other products can be included within the scope of the home stay to improve the services? Please mention here_______________________
7. What are the opportunities available related to home stay improvement? Please specify.
VI. Growth trend
1. What can you say about the trend in home stay operation in the locality? Please tick them.
   a) No of home stays are increasing □  b) No of home stays are decreasing □
   c) Many are showing interest □  d) some are converting to home □

2. How many home stays were established over the years in your locality?_____

3. What is the annual no of tourist occupying your home stay compared to previous year?
   a) Last year_____________ b) previous year ____________

4. Is there any increase in the number of home stay users from the locals over the years?
   Yes □  No □  If yes, how many of them have used your home stay___

4. What is the general trend in the operation of home stays in the villages?
   a) Youths taking lead role □  b) unemployed youths returning home □
   c) Retired civil servants taking the job □  c) more women taking the lead □

V. Potential for other ecotourism products
1. What are the other related home stay products available in the community? List down.

2. What are the relevant services that can be included within the home stay service? List down.

3. What is the unique speciality of the community that can be showcase with the home stay? List down.

VI. Addressing geographical and seasonal spread
1. How accessible are the visitors to the home stay compared to other places?
   a) Easily accessible □  b) Not easily accessible from town □
   c) Need to hike and use horse □  d) Availability of farm road □

2. Is there availability of all the modern amenities in the home stay?
   Yes □  No □
If yes, please tick the following.

<table>
<thead>
<tr>
<th>a) Mobile phone access</th>
<th>□</th>
<th>b) Access to internet</th>
<th>□</th>
</tr>
</thead>
<tbody>
<tr>
<td>c) Making market products available</td>
<td>□</td>
<td>d) Cable TV service</td>
<td>□</td>
</tr>
</tbody>
</table>

3. What is the number of visitors during peak and off peak seasons? Please specify.

<table>
<thead>
<tr>
<th>a) Peak season</th>
<th>□</th>
<th>b) Off peak season</th>
<th>□</th>
</tr>
</thead>
</table>

4. Is there willingness of the operators or guides to lead the visitors to the community?

| a) Yes                     | □ | b) No                          | □ |
|                            |   | c) somewhat                    | □ |
8.2 Questions for Campsites

Speak to village campsite operators or the developers. Begin with the following introduction:

Introduce yourself: My name is __________, representing Norlha Engineering and Management Consultancy for the work Evaluation of Ecotourism awarded by Gross National Happiness Commission. We would like to know about the programs implemented for development of ecotourism in the locality where our focus will be on the village home stays and the camp sites. Please feel free to provide us the response as per the questions below. The results of the study will never reveal your name (it will be kept confidential). If okay with you, I would like to ask you a few questions – your opinion is very important to this study. Thank you in advance for helping us with this study.

I. Personal Information

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Name</td>
<td>2. Location</td>
</tr>
<tr>
<td>3. Gewog</td>
<td>4. Dzongkhag</td>
</tr>
<tr>
<td>5. Operated by</td>
<td>6. Level of Education</td>
</tr>
</tbody>
</table>

II. Camp site information

10. How long have you been operating this service (camp site)? ______

11. What do you feel about the actual benefits of Camp sites?
   a) Improved family income
   b) Improved conservation of environment
   c) Improved preservation of tradition and culture
   d) Not much of benefit

12. How many people can be accommodated in the campsite at once? ______________

13. What is the average length of stay per tourist in the camp site? ______ days

14. In which months you receive the highest number of tourist? ______

15. What is the average number of tourist do you receive in a year? ______

16. What is the trend of tourist arrivals in the camp site compared to previous years?
   a) Increasing
   b) Decreasing
   c) Same

17. Who all are the guests occupying the camp site?
   a) International
   b) Regional
   c) Government officials
   d) Private people

18. How do you get the guests in the camp site?
Evaluation of Ecotourism

a) Contact with guides  b) Contact with tour operators
c) Contact with Dzongkhag officials  d) Personal contacts

10. What is the rate for camp site per night per head?__________

III. Impact of Ecotourism

1. What is the average annual earnings from the camp site?__________ What is the trend of income generation over the years? List them from 3-5 years income________

2. What are the sources of income generation through campsites?
   b) Bed night  c) Rental
   b) guide service  d) others

3. Do households in the vicinity benefit? Yes  No
   If yes, in what form, please specify_____________________

4. Is there any business activities grown nearby? Yes  No
   If yes, then what kind of business and how much do they make in a year________________

5. What are the employment opportunities created by the campsites? Please list down____

6. Is there any community fund generated from the campsites? If so, how is it being used?____

7. With the earnings from the camp site, are you able to supplement your living conditions? Yes  No
   If yes, please tick the appropriate facilities availed after the operation of the camp site.
   b) Concrete or semi concrete houses  c) Own TV
   b) Own car  d) Own other facilities

8. Are you able to support your children to schools from the earnings supplemented by camp site? Yes  No
   If yes, please rate as below.
   c) Immense support  d) Moderate support
   d) Slight support  d) No support

9. Did you receive any form of training for camp site operation? Yes  No
**Evaluation of Ecotourism**

If yes, which areas you were trained.

<table>
<thead>
<tr>
<th>a) Camp site management</th>
<th>b) Hospitality</th>
</tr>
</thead>
<tbody>
<tr>
<td>c) Booking keeping</td>
<td>d) Conservation of environment</td>
</tr>
<tr>
<td>e) Waste management</td>
<td>f) Sanitation and Hygiene</td>
</tr>
<tr>
<td>g) Camp site products and services</td>
<td>h) Others</td>
</tr>
</tbody>
</table>

10. Is there an improvement on the overall living conditions of your family due to campsite?

Please rate as follows:

<table>
<thead>
<tr>
<th>a) Highly improved</th>
<th>b) Improved</th>
</tr>
</thead>
<tbody>
<tr>
<td>c) Little improvement</td>
<td>d) No improvement</td>
</tr>
</tbody>
</table>

**IV. Conservation of environment and culture**

1. Are you using traditional items and products in the campsite?

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
</table>

If yes, please tick the appropriate traditional items being used in the campsite

<table>
<thead>
<tr>
<th>a) Utensils</th>
<th>b) Furniture</th>
</tr>
</thead>
<tbody>
<tr>
<td>c) Local food</td>
<td>d) other products</td>
</tr>
</tbody>
</table>

2. How do you treat the visitors in terms of tradition and culture? Please tick the appropriate fields below.

<table>
<thead>
<tr>
<th>a) Reception as per Bhutanese way</th>
<th>b) Cultural program</th>
</tr>
</thead>
<tbody>
<tr>
<td>c) Involvement in cooking</td>
<td>d) Involvement in other activities</td>
</tr>
</tbody>
</table>

3. Are you still using firewood or other sources of energy for cooking and heating purposes?

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
</table>

If no, what else do you use_______________________

4. How often do you get involved in the community services for managing waste? Please tick the following.

<table>
<thead>
<tr>
<th>a) Very frequently</th>
<th>b) Sometimes</th>
</tr>
</thead>
<tbody>
<tr>
<td>c) Rarely</td>
<td>d) Not at all</td>
</tr>
</tbody>
</table>

5. What activities are being carried out in order to preserve environment and culture?

6. Did you get an opportunity to attend training/awareness programs on conservation of environment and culture?

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
</table>

If yes, please mention here_______________________

7. What are the systems in place to manage waste? ______________
Evaluation of Ecotourism

V. Issues, challenges and opportunities
1. Are there any issues or problems in the operation of the camp site? Yes ☐ No ☐
   If yes, please list here

2. What are the coordination problems do you face? Please check the appropriate ones below.
   a) tour guides ☐ b) tour operators ☐
   c) Dzongkhag administration ☐ d) Gewog administration ☐
   e) Among the home stay operators ☐

3. What can you say on the overall performance of the campsite management? Please rate them below.
   a) Difficult to manage ☐ b) manageable ☐
   c) Difficult to adjust with the visitors ☐ d) Difficult to run along with farm works ☐
   e) Others____________________

4. Did you take any loans from the banks? If so how accessible are the loans from the banks?
   a) Difficult to get loan ☐ b) easy to get loan ☐
   c) Lot of criteria to fulfil ☐ d) Others ☐

5. What are the operational difficulties do you face? Please tick below:
   a) Competition from the hoteliers ☐ b) Competition among operators ☐
   c) Absence of uniform rate ☐ d) Not able to get visitors ☐

6. What other products can be included within the scope of the camp site to improve the services? Please mention here ________________

7. What are the opportunities available related to campsite improvement? Please specify.

VI. Growth trend
1. What can you say about the trend in campsite operation in the locality? Please tick them.
   a) No of campsites increasing ☐ b) No of campsites decreasing ☐
   c) Many are showing interest ☐ d) some are withdrawing ☐

3. How many campsites were established over the years in your locality?____
Evaluation of Ecotourism

3. What is the annual no of tourist utilizing the campsites compared to previous year?
   a) Last year ____________  b) previous year ____________

4. Is there any increase in the number of campsite users from the locals over the years?
   Yes  [ ]  No  [ ]  If yes, how many of them have used your campsite ____________

4. What is the general trend in the operation of campsite in the villages?
   a) Youths taking lead role  [ ]  b) unemployed youths returning home  [ ]
   c) Retired civil servants taking the job  [ ]  c) more women taking the lead  [ ]

V. Potential for other ecotourism products
1. What are the other related campsite products available in the community? List down.

2. What are the relevant services that can be included within the campsite service? List down.

3. What is the unique speciality of the community that can be showcase with the campsite? List down.

VI. Addressing geographical and seasonal spread
1. How accessible are the visitors to the campsite compared to other places?
   a) Easily accessible  [ ]  b) Not easily accessible  [ ]
   c) Availability of nearest farm road  [ ]

2. Is there availability of all the modern amenities in the campsite?
   Yes  [ ]  No  [ ]
   If yes, please tick the following.
   b) Mobile phone access  [ ]  b) Access to internet  [ ]
   c) Making market products available  [ ]

3. What is the number of visitors during peak and off peak seasons? Please specify.
   a) Peak season ____________  b) Off peak season ____________

4. Is there willingness of the operators or guides to lead the visitors to the community?
   a) Yes  [ ]  b) No  [ ]  c) somewhat  [ ]
8.3 Interview Questions to other officials

**Personal Information**

1. Name________________  
2. Location_____  
3. Gewog_________  
4. Dzongkhag___________  
5. Agency: ____________

1. What can you say about the actual benefits of home stay or Camp sites in the villages?  
2. What do you think on the aspects of operation and management of home stays or campsites in the villages?  
3. Are the home stays and campsites easily accessible for the visitors? If not what needs to be done to improve it.  
4. What can you say about the conservation of environment and culture through implementation of home stays and campsites for the visitors?  
5. Do you think waste created by the visitors is properly managed by the operators?  
6. What do you think are the challenges, issues and problems faced by the ecotourism industry including those home stay and campsite operators?  
7. What are the opportunities that you foresee in the home stays or campsites?  
8. What are the relevant products available within the scope of the home stay and campsites in the villages?  
9. What do you feel are the improvements required in the management and operation of the home stays and campsites in the ecotourism sites?  
10. What can you say about the distribution of visitors to home stays across all parts of the country?  
11. What factors affect in the overall efficiency and improvement of the home stay/campsite management and operation?  
12. What are the impacts of home stay or campsite operations in the villages?  
13. What do you think about the tourist arrivals in the villages during peak and off peak seasons?
8.4 Reference Group

a) Rinzin Jamtso, Chief, Tourism Council of Bhutan
b) Tshering Pem, Forestry Officer, Nature Conservation Division
c) Tek Bahadur Khatiwara, Association of Bhutanese Tour Operators
d) Sonam Tobgyel, Deputy Chief, Research and Environment Division, Gross National Happiness Commission