



Asta-Ja Policy Briefs

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Tourism Issue

Message from the President

We are pleased to present to you the second issue of the *Asta-Ja Policy Briefs*. This issue includes three scholarly policy briefs related to tourism in Nepal. While the world is currently struggling with COVID-19 pandemic, we anticipate significant changes on world order including socio-economic, tourism, businesses, human geography, and political undertakings in post-COVID-19 era. COVID-19 pandemic together with existing global problems such as global climate change, poverty, environmental/ecological degradation, and increasing incidences of natural disasters across the globe pose immense threat to our societies. Global tourism will also be affected. A new perspective on tourism is necessary for countries such as Nepal for sustainable tourism development. The briefs presented in this issue provide some guidance in this respect. We hope to publish policy briefs on issues on a regular basis. However, for this hope to come true we need submissions of policy briefs from experts and scholars interested in the development of Nepal and her people. Our humble request to you: please contribute to make this journey a more meaningful one.

As COVID-19 infection that began late 2019 from Wuhan, China, has reached 210 countries infecting 1,621,348 people and claiming 97,179 lives globally by April 10, 2020, we extend our heartfelt condolences to the families who have lost their loved ones and salute doctors and nurses and all individuals in the front lines fighting against this pandemic. We wish everybody safe and healthy life!

Please visit our website www.astjausa.org for more information.

Durga D. Poudel, Ph.D.
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Tourism in Nepal: Emerging Possibilities

Kedar Neupane
Geneva, Switzerland

Background

As I narrate this, there is fear around the globe of a collapse of the tourism industry due to spread of pandemic coronavirus (COVID-19) disease. Unfortunately, this unexpected development has crashed government of Nepal's "Visit Nepal 2020" campaign before it even commenced. Sadly, this pandemic has a potential to bring down tourism-driven economic sectors to the knees.

Tourism has become a major source of foreign currency earnings in Nepal for years. Even though this is much less now than the overseas remittances received, its direct impact on the local businesses and domestic job market is significant. Direct contribution of travel and tourism industry to GDP in 2016 was 3.6%. Overseas remittances generally account for one-third of Nepal's annual budget and a sizeable chunk of foreign currency reserve.

According to World Travel and Tourism Council (2017), tourism industry supported one million people and provided to many local communities additional means of earnings. However, tourism earning in Nepal is low compared to her Asian peers despite the claim that Nepal is one of the top tourist destinations. This policy emphasis for years on tourist arrival numbers rather than qualitative improvements of the travel industry through quality tourism seems to have been somewhat misplaced. Nepal is one the cheapest destinations in the world. It is also noteworthy that per capita average tourist expenditure in Sri Lanka was US\$ 174. It was only US\$ 44 in Nepal. If we continue with policy of promoting least-cost destination focusing on arrival numbers, it will not raise additional revenues.

Data provided by the government shows tourists chose mainly three activities: leisure holidaying, adventure mountaineering and trekking, and cultural pilgrimage. In 2018, bulk of the visitors came for pleasure holiday trips (70%). Some 66% of the foreign visitors preferred visiting national parks and conservations sites, while 2.4% chose trekking with highest number heading to Humla, and some 32% of the visitors to pilgrimage sites. The top six source markets were India (17%), China (13%), USA (8%), Sri Lanka (6%), United Kingdom (5%), Thailand (4%). On average some 2% to 3% each from Australia, South Korea, Germany, France and Japan visited Nepal. Noteworthy trend was that a large number of visitors were from Myanmar (4%), followed by Malaysia and Bangladesh, 2% each, showing promising new emerging source markets. Among the visitors 53% were male and 31% were from age group of 31 to 45 years. Tourist arrivals data of the past five years show arrivals numbers ranged from 500,000 to 800,000 except for 2015 when Nepal experienced major earthquakes, and the number fell

sharply. The peak was in 2018 with 1.2 million arrivals recorded. This could go upward if more attention is paid to the emerging source markets. Mountaineering is a popular sport in North America and Europe, and most climbers originated from the United Kingdom, France, United States, Germany, Spain, Switzerland, Russia, Austria, Italy, Poland, Norway, Netherlands and Canada. But the numbers were not astonishingly high. Mountaineering expeditions were also from Australia, China, Japan, India and South Korea dominating the numbers originating from Asian countries. Principal destinations, as always, have remained the Everest, Amadablam and Manaslu.

Clearly, policy strategies need to be reoriented for attracting visitors from emerging source markets as prime marketing targets areas.

Policy Options

Tourists arrivals data of the past decades show visitors from European countries, North America and Australia have largely unchanged while arrivals from emerging source markets Thailand, Myanmar, Malaysia, Sri Lanka, South Korea and Bangladesh increased. Tourism promotion in these source market countries could be beneficial than mere focus on traditional markets which have not delivered expected numbers. But again, most Asian visitors might not be enthusiastic about mountaineering expedition and adventure trekking with exception of limited interests from India, China and South Korea.

Apart from generating multiplier economic effects, tourism could also become an important venue for promotion of community's history, culture and religious traditions. If this sector is better organized focusing on the qualitative aspects of the industry, it could foster better relationships between people of different identities and regions and develop awareness and respect for one another's cultures, traditions and heritage. Combination of these elements would positively contribute to sustainable development through socio-political harmony and enriching common cross-cultural understanding. Government of Nepal should, hence, prioritize tourism development strategies with this new lens.

Nepal is blessed with a mosaic of multicultural local traditions, rich attractions and cultural heritage beyond having some of the world's highest mountains. Nepal has stunningly unparalleled landscape in a natural setting of low rising hills to medium to high Himalayan range. However, this potential has not been fully explored and developed due to restrictions on foreign direct investments for development of topmost world class travel destination for high spending travellers, like many other Asian countries have achieved. These restrictions should be removed so that FDI can be used for development of historical locations and other recreational facilities for high spending visitors, including development of retirement villages.

Nepal's traditional tourism interest continues to focus on adventure tourism with mountaineering expeditions and trekking. Government data show this focus has neither delivered high visitor numbers nor increased foreign currency incomes. On the contrary, excessive reliance on mountaineering expeditions and adventure promotion resulted in adverse perception emanating from the worldwide television images of amateur travellers clogged on top of the Mt Everest trail during the 2019 season. This has not only produced a profound but negative perception about government's environmental priority, but also pointed out shortcomings in organizational and management skills within the industry. Policies to change this perception are necessary.

Nonetheless, Nepal remains a desirable travel destination from non-SAARC countries, but challenge will be to manage it sustainably with consideration for protection of environment, preservation of ecosystems and economic growth. It is obvious from the changing traveller profile and travel trend that it is unlikely mountaineering expedition will deliver high numbers of arrivals as more and more visitors showed holidaying interests at locations shrouded with pristine natural surroundings of national parks, conservation sites, and other intriguing religious and inspiring cultural heritage sites.

Significant part of modern history of Nepal is linked with Kathmandu Valley which is endowed with rich tradition and heritage. This warrants preservation of crafts, culture, arts, traditions, temples and stupas which are gradually overshadowed, if not disappearing, under the rising clouds of unfettered modernization and urbanization of the valley. Government should seriously contemplate exclusive development of the valley into a prime travel destination through restoration of Nepal's historical, architectural and ancient glory. However, to turn the Kathmandu Valley into a world class tourism destination it must first shift national capital Kathmandu out of the valley to a new site. Many countries (e.g., India, Pakistan, U.S.A., Canada, Egypt) have done that, so it should not be a big deal for Nepal.

Recommendations

In conclusion, government can contemplate a combination of the following policies through a comprehensive tourism masterplan:

- 1) Relocate national capital away from Kathmandu Valley to another suitable new location.
- 2) Develop pilgrimage sites, national parks and conservation areas, with due consideration to preservation of environment and ecosystems for attracting high spending visitors.
- 3) Develop Nepal as a true **retirement destination** in collab-

oration with international entrepreneurs to attract the aging world population.

- 4) Finally, consideration could be given to tourism theme of **"Reinventing Oriental Spiritual Circuit"** incorporating pilgrimage sites within Nepal that are linked with spirit of Hinduism and Buddhism stretching from Janakpur Dham, to Devdaha, to Kapilavastu, to Siddharthanagar, to Lumbini, to Doleshwor Mahadeva, to Pashupatinath temples for spiritual enlightenment of visitors, from Asian countries and beyond. This travel circuit could be enlarged by incorporating additional sites such as Ayodhya and Sarnath, to Bodhgaya in Northern India. This is doable if there exists a serious thinking behind effective promotion and development of tourism industry in Nepal.

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Tourism in Nepal after COVID-19

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Background

On February 8, I was on my way to Kathmandu for a tourism-related workshop. China was coming to grips with the Coronavirus; Europe was still a safe destination to travel to; and North America was going about its business as usual, but was wary of what was happening in China, Hong Kong, Taiwan and South Korea. As I arrived at Toronto's Pearson International Airport for my flight to Kathmandu, I was almost shocked how empty the departure lounge was at noon, normally a busy time of the day at the airport. This had a dampening effect on my mood, and I thought about the likely effect on tourism destinations in countries like Nepal which had declared 2020 as the Visit Nepal Year. We all know by now how things have turned out since January 1 of this year. The tourism industry in Nepal has always worked under the assumption that things will be normal, and that tourists would continue to flock to Nepal. This assumption is going to have a devastating impact on people that are dependent on Nepal's tourism industry.

Policy options

To begin with, the Visit Nepal 2020 Year was not thought out well, especially considering Nepal's goal to attract 2 million tourists. As someone who has observed tourism development in Nepal for the last three decades, my first reaction was, it's crazy even to think about it – Nepal does not have the infrastructure to support that number. On the contrary, roads that have been haphazardly dug out in the mountains have not only increased the frequency and intensity of landslides, they have simply ruined the aesthetic appeal of the mountains. Annapurna is no longer a classic trekking destination, its mountains that evoke a sense of adventure have been crisscrossed by hazard-prone and hazard-inducing roads. Khumbu has become overly commercial, people trying to cash out tourism as if there is no tomorrow. It's as if the tourism industry in Nepal is going "all in", that is, it is thinking of increasing the number of tourists to Nepal no matter the type of tourists and what they are interested in seeing and doing things once they arrive. The tourism industry is completely oblivious to the fact that for the vast majority of tourists, Kathmandu's alarming pollution remains a major deterrent despite it being the host of several UNESCO heritage sites. Thamel has turned into a mini "sin city", unlike its image two decades ago as a gateway for adventure travel. As someone born and raised in Kathmandu, it is painful to see what Thamel has be-

come. Instead of attracting tourists, it is now detracting tourism due to its hedonistic pleasures aimed at locals and tourists.

Policy Choice

I think the COVID-19 has given Nepal's tourism industry an opportunity to reset, and turn its attention away from haphazard development of tourism to one that repositions itself as the adventure capital of the world. And when I say adventure, I am not just talking about trekking and mountaineering adventure, I am interpreting adventure as the "all-inclusive" travel that blends Nepal's natural and cultural experiences as one big adventure. We cannot go back in time, but we can certainly learn lessons from our past mistakes of prioritizing quantity over quality. Bhutan has learned from Nepal's experience and is charting a very different course, though I admit Bhutan's tourism development has its own set of challenges (that is for another time). For now, I will list a few important steps the tourism industry in Nepal needs to pivot from an all-in "mass" to "class" tourism development practices. There is room for mass tourism in Nepal, but that needs to be carefully planned, and not considered as "free for all".

1. Improving and reorienting Nepal's access to international tourism markets: We cannot put all eggs in one basket and need to make significant efforts to diversify our international tourism markets. Big lesson in 2020 was the consequence of overreliance on the Chinese market. Marketing efforts should also focus on the emerging "adventure tourists". These are city-based, below 40 people, increasingly orienting their lifestyle toward exploration and outdoor adventure.
2. Dramatically improving tourism infrastructure and service provisions throughout the country: This means from establishing professional tourist information centers at locations accessible to tourists (e.g., Thamel) to site level facilities such as toilets. I remember several years ago when one of my Canadian students desperately wanted to use the toilet during a field excursion in the city, I had to approach a resident and request permission to allow my student to use the toilet in his house. There also needs to be a system of regulating and monitoring quality in service provisions. Thamel has seen a profusion of trekking and travel agents. The growth is not sustainable as it leads to unhealthy competition and price undercutting. Same can be said about the profusion of homestays in rural areas of Nepal. This unnecessary "democratization", or free for all type of tourism entrepreneurship does not align well to Nepal's goal in ensuring quality over quantity tourism.
3. From a tourism development perspective, we cannot open every rural area via roads. Certain areas need to be totally off-limits to tourism development, while some areas should limit developments to maintain as highly attractive high-value tourism destinations.

4. Diversifying and extending tourism experience: Some roads (for example, to Muktinath) have the capacity to function as important tourist traffic corridors that provide access to tourism attractions in the area. These attractions, if planned and developed carefully with specific theme-based itineraries, have the ability to facilitate adventure experience for all age groups. For example, pilgrims visiting Muktinath are currently focused on a very narrowly defined purpose of travel (i.e., religious). This motivation needs to be expanded to include nature and culture experiences, in addition to religious and spiritual experiences. The primary idea here is to think of tourism destinations in terms of *lines*, *circuits* and *clusters*, and develop areas and itineraries accordingly.

5. Building professionalism in sustainable tourism practices: The majority of future tourists are most likely going to be mindful, sustainability-oriented tourists. This is already the trend in many countries in Western Europe, North America and East Asia. A positive impact of COVID-19 on future tourists, including those arriving in Nepal, is likely going to be a heightened sense of awareness of environmental health and wellbeing. Nepal should position itself to capture this wave of the “new”, mindful, tourists.

6. Accelerating the development of an alternate international airport outside of Kathmandu Valley: Airports in Pokhara and Bhairahawa are good alternatives, but we need to accelerate our capacity to turn the Nijgadh airport into a South Asian regional hub.

Of course, many more items can be added on this list. The point of this brief is to highlight that ways of doing tourism business in Nepal needs to be changed if we want to be able to survive COVID-19 like crisis in the future. While one can be cynical of the morally bankrupt social-political order, where institutionalized corruption and crime rules the day, I believe it is Nepal’s tourism industry that has the ability to pull back the country from the brink of economic and environmental collapse.

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**Asta-Ja USA would like to extend
warm wishes on auspicious
occasion of Nepali New Year
2077 B.S.**

Asta-Ja USA Family

Tourism and Economic Development in Nepal

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Background

Economic revolution comes with revolutionary ideas that change the perception, expectation, and realization. There are all reasons for us to be optimistic. I will try to lay out the concrete reasons for Nepalese to be optimistic about the economic prospect of Nepal and how economic revolution can be brought about in Nepal even by only focusing on tourism. Every country wants to prosper and improve their people's lives. History shows that countries that have experienced faster economic growth are those that have properly identified their unique resources and location and have wisely developed them. Nepal is blessed with all eight (Asta-Ja) types of resources: jal (water), jungle, janshakti (manpower), jamin (land), jalabayu (climate), janawar (animal), jadibuti (medicinal and aromatic plants), and jarajuri (crops) (Poudel, 2008). In addition, Nepal also has unique heritages by being birth place of Buddha, Sita, Vyas, Luv-Kush, and Mandodari. While Nepal has the leverages of adopting various policy initiatives to bring about economic revolution in the country, in this brief, however, I have shown how Nepal can achieve the goal of being a middle-income country in a matter of 10 years just through the development of tourism.

Policy Options

There are eight major areas that can drive economic development in Nepal, such as, tourism, hydro power and water resources, human capital development, infrastructure development, mining, agriculture, biomedical research, and R & D in agriculture and other fields. The following very famous Cobb-Douglas production explains how the above policies will spur economic growth.

$$Y = AK^{0.3}L^{0.7}$$

Where Y is the amount of nation's real output, A is the total productivity, K is the amount of capital available, and L is the amount of labor available. A nation experiences economic growth when Y rises, which, in turn, rises when A, K, or L rises. By taking one of the above policies, Nepal can substantially raise the total productivity (A) and thereby can have revolutionary economic growth.

Recommended Policy Option

While Nepal can take any of the above policies to enhance total productivity (A) and spur economic growth, I will discuss how Nepal can economically transform itself through tourism.

Three major attributes stand out clearly when we examine top tourist-attracting cities (Source: Wikipedia) and countries: (a) natural beauty, (b) cultural heritage, and (c) uniqueness (being only one

or number one). Nepal is really blessed, because it has all three. Nepal is rich in natural beauty as it has numerous high-and-low altitude lakes, fountains, and landscapes that are unique of a country. The country has unique cultural heritages as it is the birthplace of Buddha who enlightened the world with his message of peace, the birth place of Sita - a role model, Vyas – an initiator and narrator of Mahabharat, Luv, Kush, and Mandodari (Ravan's wife). It has three of the four kshetras (e.g. Mukti Kshetra, Barah Kshetra, etc.), and the Ravan Kund. In this paper, I propose the following projects that will combine our natural treasure with our cultural heritages to create unique tourist destinations:

Summary of Proposed Tourist Infrastructures

Dhanusha and Peripheries (Tentative cost: \$1 billion): Shiva Dhanush, musical fountain, museum, theme park, joint statue of Panchayatan, Hanuman statue, and monorail.

Chitawan (Tentative cost: \$1 billion): cruise, underground restaurant, floating market, aquarium, and zip lining.

Lumbini (Tentative cost: \$1 billion): monorail, Buddha temple, museum and theme parks.

Kathmandu (Tentative cost: \$500 million): cable car, observatory and boat ride.

Damak and Surkhet (Tentative cost: \$2 billion): cashinos and theme parks.

Rasua (Tentative cost: \$ 500 million): Shiva temple, Shiva pond and Parvati cave.

Ilam (Tentative cost: \$500 million): regional airport, skiing resort and snow park.

Vyasnagar (Tentative cost: \$500 million): statue of Vyas, ferry service & light and sound show.

General Infrastructures (Tentative cost: \$10 billion): airports, highways, railways and cable cars in different parts of countries.

Tentative Costs

The tentative cost of all above projects stands at \$17 billion.

Tentative Benefits

Now let's look at the possible benefits from the above tourist infrastructures. Let's just look at Chinese and Indian tourists. In 2017, Bangkok received 21.5 million tourists 27% of them was from China alone, that is, about 5.8 million. Similarly, recent data shows that Tirupati alone receives 20-30 thousand tourists every day. That means it receives 25,000 x 365 = 9,125,000. Data for 2019 show (Source: Index Mundi) that per-person average expenditure of Chinese tourists was \$1,802 and that of Indian tourists was \$913. If we can bring approximately equal numbers of tourists from these two countries alone, the tourism receipt will amount to approximately \$20 billion (= \$1,802 x 5.8 million + \$913 x 9.1 million = \$10.5 billion + \$8.3 billion) annually. If you include other major tourist sending countries, such as, United States, Japan, S. Korea, Canada, and European countries the total tourism receipts will no doubt reach to \$30 billion mark annually. Thus the benefits clearly outweigh the costs.

There are two major concerns that are often raised by so-called environmentalists and those who have different motives than the nation's economic development: (1) environmental disaster, and (2) debt trap. As an economist I am not qualified to speak on the environmental aspects of the proposed projects. What I can tell for sure is these projects don't involve major tampering with the environment.

Debt Trap

Debt trap is the situation in which a nation becomes unable to pay the principal and interest on outstanding loans especially due to high-interest. Nations caught into a debt trap may have to seek new debt to repay old ones. Now the question is: Can Nepal, with the proposed infrastructure spending, fall into a debt trap? To find the answer to this question let's look at Nepal's current debt stock and annual debt servicing. As of April 2020 (Source: <https://tradingeconomics.com/nepal/total-debt-service-percent-of-gni-wb-data.html>), Nepal's external debt stocks totals \$5,478,096,693 with annual debt servicing cost being 0.83 percent of the nation's GNI (gross national income). As shown in World Development Indicators (<http://datatopics.worldbank.org/world-development-indicators/>), Nepal's GNI in 2018 was \$29,257,073,224. That means the annual debt servicing cost was \$242,833,708 (= 0.00283 x \$29,257,073,224). If the country takes out additional \$17 billion for the above proposed projects, its total debt servicing cost will be \$996,411,686 (= 0.0083(22,478,096,693/5,478,096,693) 29,257,073,224)). As reported by the World Bank in World Development Indicators, in 2018, Nepal's imports of goods and services and gross domestic savings as the percentage of GDP were 46.30% and 17.81% respectively, which generate an income multiplier of 1.56 (= 1/(0.4630 + 0.1781). At current rates of imports and saving, a \$17 billion in additional investment for the above projects will add additional \$26.52 billion (= \$17 billion x 1.56) to the GDP. If Nepal's tax rate stays at its 2018 level of 20.7%, then the additional GDP generated by the proposed investment will generate \$5.49 billion (= \$26.52 billion x 0.207) in additional tax revenue, which is 5 times the nation's projected debt servicing cost of \$996,411,686. So, there is no possibility of the nation falling into a debt trap. Furthermore, these are only conservative estimates. If we can lower our import to GDP ratio to 15%, which is achievable as we become energy independent, the value of multiplier will double leading to the generation of \$53 billion in additional gross national income through the above projects.

Issue of Low-Income Visitors

One of the major concerns among policy makers in Nepal is that the country mostly receives low-spending visitors generating low tourism revenues. To address this problem, we need to look at the things high-spending visitors like to see. According to recent studies, tourists including high-spending ones like to see good

infrastructures including airports, roads, hotels, etc.; different tour packages to attract both high-income and budget tourists; provision of multilingual support and ensuring that your applications work on slow networks; packaging tours both by bus and air; offering cheaper add-ons, discounted tour price, or opt for a basic product at the most accessible price with several add-ons; accepting major credit cards including Chinese and Indian ones or mobile online payments like Alipay or WeChat Pay; a warm welcome with customized brochures or travel guides speaking the visitors' language; basic amenities with excellent hygiene; instant online connectivity and technology; photo opportunities; adequate information on what to do in case of a medical emergency; and eating rituals.

Additional Recommendation

- (a) Connect with world-class agents: There are many OTAs that are used within a specific outbound travel market. [Chinese travelers will use one OTA](#), while travelers from India may opt to book their tours and activities through an OTA that works specifically with their outbound travel market.
- (b) Optimize your website for mobile use: Mobile technology is no longer a luxury but a necessity. Travelers from all places and across all age groups are becoming increasingly reliant on their smart phones and tablets. As the mobile bookings continue to rise, the most motivated market segments around the globe will be discovering new destinations through social networking and mobile searches. Tour and activity company websites need to offer a responsive web design as well as mobile booking capabilities.
- (c) Invest in video marketing: Video marketing provides tour and activity operators with a chance to engage their prospective guests and offer them an immersive glimpse into their destination.

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