



Japan International Cooperation Agency (JICA)
Guatemala Tourist Commission (INGUAT)



Study of National Tourism Development for the Republic of Guatemala

Final Report
Volume 2: Main Text



May 2002

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Pacific Consultants International



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Preface

In response to the request from the Government of the Republic of Guatemala, the Government of Japan decided to conduct the Study of National Tourism Development for the Republic of Guatemala, and entrusted the Study to the Japan International Cooperation Agency (JICA).

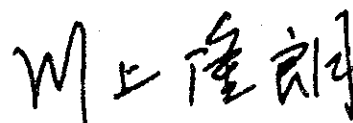
JICA selected and dispatched a study team headed by Mr. Yoshiki Hirabayashi of Pacific Consultants International to Guatemala from January 2001 to March 2002. In addition, JICA set up an advisory committee headed by Dr. Nobumaru Shindo, Professor of Toyo University, between January 2001 to March 2002, which examined the study from specialist and technical points of view.

The study team held discussions with the officials concerned of the Government of Guatemala, and conducted field surveys at the study area. Upon returning to Japan, the team conducted further studies and prepared this final report.

I hope that this report will contribute to the promotion of this project and to the enhancement of friendly relations between our two countries.

Finally, I wish to express my sincere appreciation to the officials concerned of the Government of Guatemala for their close cooperation extended to the Study.

May 2002



Takao Kawakami
President
Japan International Cooperation Agency

May 2002

Mr. Takao Kawakami
President
Japan International Cooperation Agency
Tokyo, Japan

Letter of Transmittal

Dear Sir,

We are pleased to formally submit herewith the Final Report of the "Study of National Tourism Development for the Republic of Guatemala."

This report compiles the results of the Study, which was undertaken in the Republic of Guatemala from January 2000 through March 2002 by the Study Team represented by Pacific Consultants International.

We had been assisted by many people for the accomplishment of the Study, and we would like to express our sincere gratitude and appreciation to all those who extended their kind assistance and cooperation to the Study Team, in particular, Guatemala Tourist Commission who acted as the counterpart agency.

Also, we acknowledge the effective assistance by all the officials of your Agency and the Embassy of Japan in the Republic of Guatemala.

We hope that the report will be able to contribute to formulate appropriate policies and measures for the future development of Guatemala.

Very truly yours,



Yoshiki Hirabayashi
Team Leader,
Study of National Tourism Development
for the Republic of Guatemala

Table of Contents

1.	INTRODUCTION.....	1
1.1.	Study Objectives	1
1.2.	Study Area	2
1.3.	Study Period and Workflow	3
1.4.	Study Organization	4
2.	TOURISM DEVELOPMENT STRATEGY	6
2.1.	National Context	6
2.2.	Tourism Development Strategy	17
2.3.	Marketing Strategy	20
2.4.	Spatial Tourism Structure	29
2.5.	Tourism Development Framework	40
2.6.	Initial Environmental Examination (IEE)	59
3.	TOURISM DEVELOPMENT MEASURES AT THE NATIONAL LEVEL	65
3.1.	Measures for Social Development through Tourism	65
3.2.	Measures for Adequately Managing Tourism Resources	109
3.3.	Measures for Strengthening the Tourism Sector	145
4.	TOURISM DEVELOPMENT PLAN FOR EL PETÉN PTDA	177
4.1.	Regional Context for Tourism Development	178
4.2.	Considerations for Sustainable Tourism	189
4.3.	Tourism Development Strategy	195
4.4.	Projects and Programs	211
4.5.	Construction Cost	234
5.	TOURISM DEVELOPMENT PLAN FOR LAS VERAPACES PTDA	236
5.1.	Regional Context	237
5.2.	Considerations for Sustainable Tourism	247
5.3.	Tourism Development Strategy	254
5.4.	Projects and Programs	267
5.5.	Construction Cost	283
6.	TOURISM DEVELOPMENT PLAN FOR THE SOUTHWESTERN HIGHLANDS PTDA	285
6.1.	Regional Context	286
6.2.	Considerations for Sustainable Tourism	294
6.3.	Development Strategy	301
6.4.	Projects and Programs	314
6.5.	Construction Cost	327
7.	CONCLUSIONS AND RECOMMENDATIONS	330

Abbreviations

Abbreviation English (Spanish)	Original name in English	Original name in Spanish
ADESCA	Agency for Cultural Decentralization	Agencia para la Descentralización Cultural
BOD	Board of Directors	Junta Directiva
CA	Central America	Central America
CAMTUR	Chamber of Tourism of Guatemala	Camara de Turismo
CONAMA	National Commission of Environment	Consejo Nacional de Medio Ambiente
CONAP	National Council of Protected Areas	Consejo Nacional de Áreas Protegidas
EIA	Environmental Impact Assessment	Evaluación del Impacto Ambiental
EIRR(TIRE)	Economic Internal Rate of Return	Tasa Interna de Retorno Económica
ENT	National Tourism Strategy	Estrategia Nacional de Turismo
FEGUA	Railway of Guatemala	Ferrovias de Guatemala
FIRR (TIRF)	Financial Internal Rate of Return	Tasa Interna de Retorno Financiera
FIS	Social Investment Fund	Fondo de Inversión Social
FIT	Foreign Independent Tourist	Turistas de Comodidad
FODIGUA	National Fund for Indigenous Development in Guatemala	Fondo Nacional para el Desarrollo Indígena en Guatemala
FONACON	National Fund for Conservation	Fondo Nacional para Conservación
FONAPAZ	National Fund for Peace	Fondo Nacional para la Paz
FONTIERRA	National Fund for Land	Fondo Nacional para las Tierras
FSDC	Solidarity and Community Development Fund	Fondo de Solidaridad y Desarrollo Comunitario
FTN	Northern Transverse Belt	Franja Transversal del Norte
GOG	Government of Guatemala	Gobierno de Guatemala
IDAEH	Institute of Anthropology and History	Instituto de Antropología e Historia
IDB (BID)	Inter American Bank	Banco Interamericano de Desarrollo
IEE (EAI)	Initial Environmental Examination	Examen Ambiental Inicial
IGSS	Guatemalan Institute of Social Security	Instituto Guatemalteco de Seguridad Social
INAB	National Institute of Forestry	Instituto Nacional de Bosques
INDE	National Institute of Electrification	Instituto Nacional de Electrificación
INE	National Statistics Institution	Instituto Nacional de Estadística
INFOM	National Institute of Municipal Strengthening	Instituto de Fomento Municipal
INGUAT	Guatemala Tourism Commission	Instituto Guatemalteco de Turismo
INSIVUMEH	National Institute of Seismology, Volcanology, Meteorology and Hydrology	Instituto Nacional de Sismología, Vulcanología, Meteorología e Hidrología
INTECAP	Technical Institute of Training and Productivity	Instituto Técnico de Capacitación y Productividad
IT (TI)	Information Technology	Tecnología de Información
JICA	Japan International Cooperation Agency	Agencia de Cooperación Internacional del Japón
LTC (CLT)	Local Tourism Committee	Comité Local de Turismo
MAGA	Ministry of Agriculture, Livestock and Food	Ministerio de Agricultura, Ganadería y Alimentación
MARN	Ministry of Environment and Natural Resources	Ministerio de Ambiente y Recursos Naturales
MICE (RICCE)	Meeting, Incentive, Convention and Event	Reuniones, Incentivos, Congresos, Convenciones y Eventos
MICIVI	Ministry of Communication, Infrastructure and Housing	Ministerio de Comunicación, Infraestructura y Vivienda
MICUDE	Ministry of Culture and Sports	Ministerio de Cultura y Deportes
NGO (ONG)	Non-Governmental Organization	Organización No Gubernamentales
NPV (VPN)	Net Present Value	Valor Presente Neto
OMM	Mundo Maya Organization	Organización del Mundo Maya
PDI	Integrated Development Plan	Plan de Desarrollo Integrado
PDS	Sustainable Development Program	Programa de Desarrollo Sostenible
PINFOR	Forestry Incentive Program	El Programa de Incentivos Forestales
PLV	Las Verapaces Program	Programa Las Verapaces
PTDA (ADTP)	Priority Tourism Development Area	Área de Desarrollo Turístico Prioritario
SEGEPLAN	General Secretariat of Planning and Programming	Secretaría General de Planificación y Programación
SICA	System of Integration of Central America	Sistema de Integración de Centroamérica
SIGAP	Guatemalan System of Protected Areas	Sistema Guatemalteco de Áreas Protegidas
SIT (TIE)	Special Interests Tourist (or Tourism)	Turistas de Interés Especial
SME (PyME)	Small and Micro Enterprise	Pequeña y Microempresa
SWOT (FODA)	Strengths, Weaknesses, Opportunities and Threats	Fortaleza, Debilidad, Oportunidad y Amenaza
UNDP (PNUD)	United Nations Development Program	Programa de las Naciones Unidas para el Desarrollo
URNG	Guatemala National Revolutionary Unit	Unidad Revolucionaria Nacional Guatemalteca
VFR (VdAyP)	Visit Friends and Relatives	Visita de Amigos y Parientes
WTO (OMT)	World Tourism Organization	Organización Mundial de Turismo

1. INTRODUCTION

In response to the request of the Government of the Republic of Guatemala, the Government of Japan decided to conduct the Study of National Tourism Development for the Republic of Guatemala (hereinafter referred to as “the Study”).

Japan International Cooperation Agency (hereinafter referred to as “JICA”), the official agency responsible for the implementation of technical cooperation programs, organized and sent a study team (hereinafter referred to as “JICA Study Team”) to undertake the Study in accordance with the Scope of Work agreed upon between Guatemala and Japan on August 25th, 2000. On the part of Guatemala, Guatemalan Tourism Commission (Instituto Guatemalteco de Turismo - hereinafter referred to as “INGUAT”) acts as the counterpart agency to JICA Study Team, and tasked to coordinate among governmental and non-governmental organizations for the smooth implementation of the Study.

1.1. Study Objectives

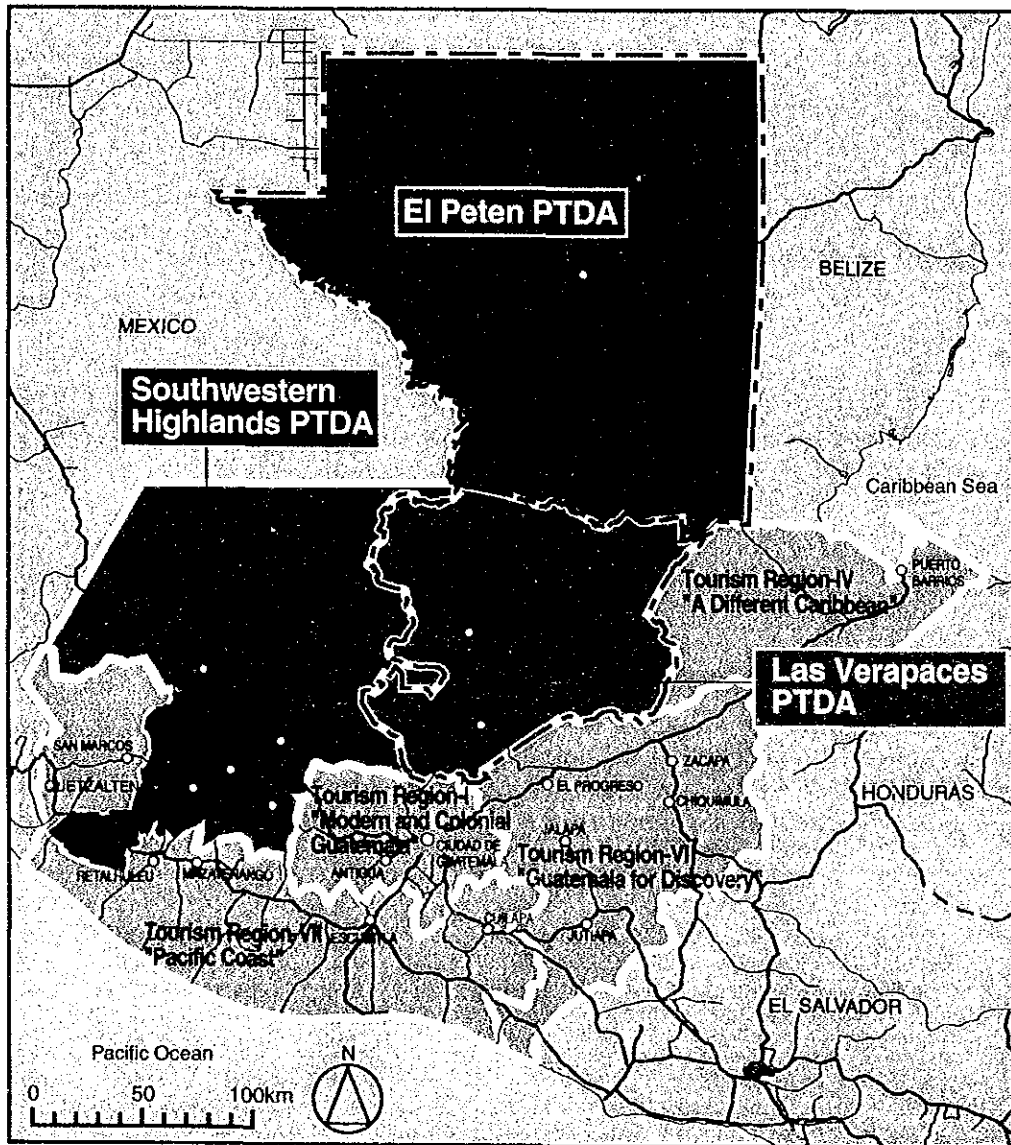
The objectives of the Study according to the said Scope of Work are as follows:

- To prepare a national tourism master plan with the target year of 2020,
- To choose priority tourism development regions, and to prepare their regional tourism master plans with the target year of 2020,
- To choose pilot projects and conduct their feasibility study with the target year of 2010, and
- To transfer know-how and techniques to the counterparts of the Study.

1.2. Study Area

The Study Area covers the whole Republic of Guatemala. Three Priority Tourism Development Areas (PTDAs) of El Peten, Las Verapaces (Coban and its vicinity), and Southwestern Highlands (Quezaltenango and its vicinity) are chosen and agreed between the JICA Study Team and INGUAT. Figure 1.1 shows the Study Area, the three PTDAs, and seven Tourism Regions used by INGUAT.

Figure 1.1 Study Area, Tourism Regions, and Priority Tourism Development Areas

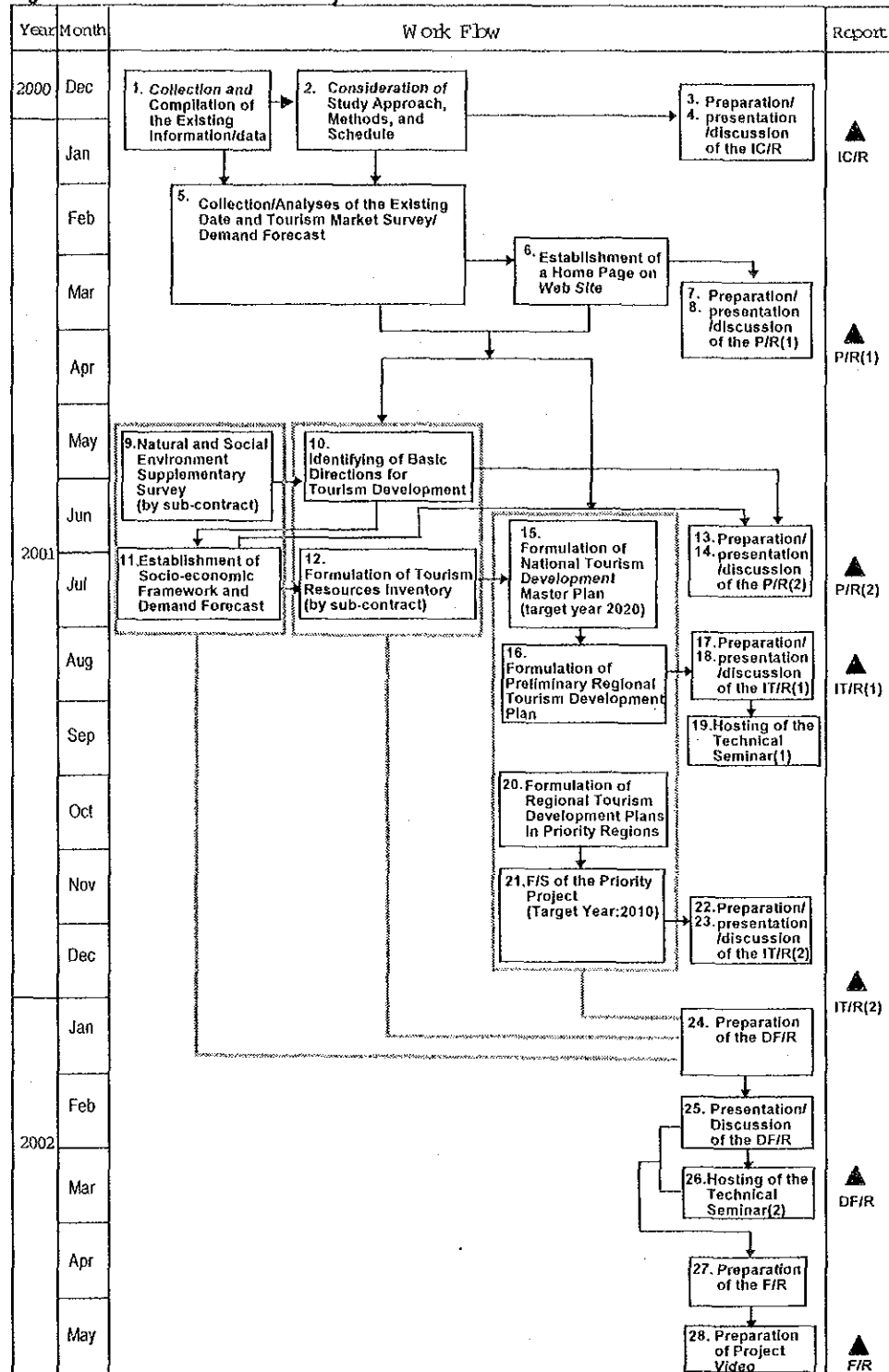


Source: JICA Study Team

1.3. Study Period and Workflow

The Study was conducted from December 2000 to May 2002 according to the flowchart as shown in Figure 1.2.

Figure 1.2 Workflow of the Study

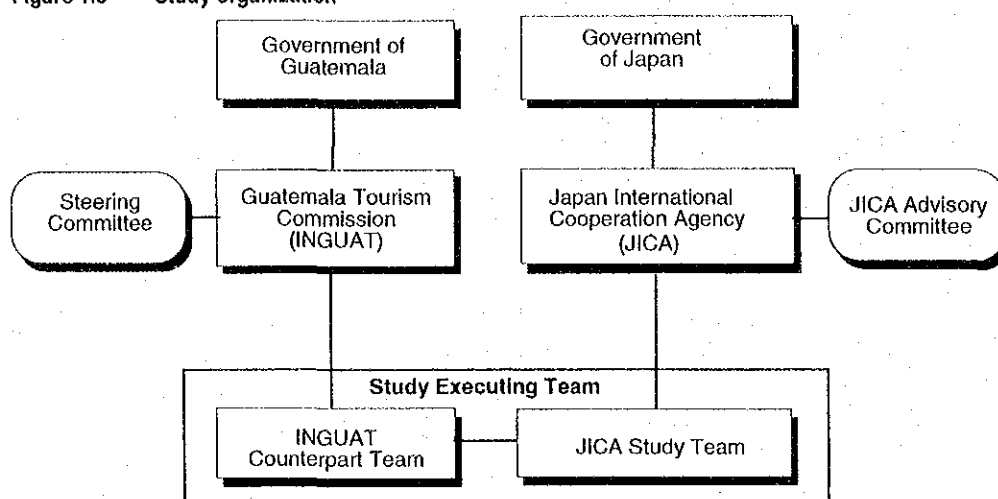


Source: JICA Study Team

1.4. Study Organization

The Study was conducted by the JICA Study Team and its Counterpart Team from INGUAT. The Steering Committee on the Guatemalan side and JICA Advisory Committee on the Japan side were organized and provided advice to the Study. Figure 1.3 shows the study organization.

Figure 1.3 Study organization



Source: JICA Study Team

The steering committee was composed of representatives from the following organizations.

- Ministry of Economy
- Secretariat of Planning and Programming (SEGEPLAN)
- Ministry of Culture and Sports (MICUDE)
- Ministry of Communication, Infrastructure and Housing (MICIVI)
- Ministry of Agriculture and Livestock (MAGA)
- Institute of Anthropology and History (IDAEH),
- Ministry of Environment and Natural Resources (MARN)
- National Council of Protected Areas (CONAP)
- Technical Institute of Training and Productivity (INTECAP)
- Chamber of Tourism of Guatemala (CAMTUR)
- National Institute of Municipal Strengthening(INFOM)
- Mundo Maya Organization

Members of the INGUAT Counterpart Team are shown in Table 1.1.

Table 1.1 Members of the Counterpart Team

Name	Position
Ms. Lucía de Hurtado*	Sub-director
Mr. Roberto Godoy	Advisor
Mr. Walter Fischer	Director of Marketing Division
Ms. Lorena de Paredes*	Chief of Product Development Division
Ms. Sandra Monterroso	Chief of Marketing Division
Ms. Adela Arreaga	Chief of Planning Department
Ms. Eugenia Escobal	Chief of Formation Department
Mr. Francisco Chaverri*	Chief of Market Research Department
Ms. Alejandrina Silva	Cultural Heritage
Ms. Fabián Díaz	Design Unit
Mr. Julio Girón	Projects Supervision
Ms. Lucrecia Gordillo	Study and Projects
Ms. Rebeca de Mendía	Planning Department
Ms. Guisela Mayén	Planning Department
Mr. Guillermo Scheel	Planning Department

Note: * Untill September 2001, ** After September 2001
Source: JICA Study Team

Table 1.2 Members of the JICA Advisory Committee

Name	Position
Mr. Nobumaru Shindo (Chairman)	Professor, Faculty of International Tourism, Toyo University
Mr. Yuji Seki	Associate professor, Department of Social Research, National Museum of Ethnology
Mr. Hiroyuki Kozuma	Tourism Department, Policy Bureau, Ministry of Land, Infrastructure and Transport
Mr. Kenichi Yanaka	Economic Cooperation Bureau, Ministry of Foreign Affairs
Mr. Osamu Hamada	Policy Bureau, Ministry of Land, Infrastructure and Transport
Mr. Mitsunori Kondo	Tourism Department, Policy Bureau, Ministry of Land, Infrastructure and Transport

Source: JICA Study Team

Table 1.3 Members of the JICA Study Team

Name	Assignment
Mr. Yoshiki Hirabayashi	Leader/ tourism planning (1)
Mr. Takeshi Omura	Sub-leader/ tourism demand forecast/ tourism planning (2)
Mr. Hideyuki Sasaki	Social environment/ regional development/ social considerations for indigenous people (2)
Mr. José Juan Zorrilla	Social considerations for indigenous people (1)
Mr. Alfonso Jiménez	Market research (1)/ tourism product development
Mr. Susumu Harayama	Tourism administration
Mr. Tsuneyuki Ouchi	Tourism promotion
Ms. Alejandra Zorrilla	Cultural tourism resource conservation
Mr. Klaus-Dieter Schneider	Pubic finance/ economic and financial analysis
Ms. Junko Okamoto	Tourism resource evaluation/ market research (2)
Mr. Kazunori Seki	Tourism facility planning
Mr. Iwao Kurosaka	Tourism infrastructure/ cost estimation/ construction method
Mr. Tsuyoshi Ito	Natural conditions/ environment
Ms. Nami Hirai	Administrative coordinator

Source: JICA Study Team

2. TOURISM DEVELOPMENT STRATEGY

2.1. National Context

2.1.1. Review of Existing Conditions

The following sections summarize principal issues for tourism development as a basis for the tourism planning at the national level.

(1) Tourism Resources Utilization

- There are tourism resources that are evaluated to have the highest tourism potential but not properly utilized as tourism products. Main reasons are poor accessibility, lack of services and facilities, and lack of market awareness.
- Archeological sites are a highlight of Guatemalan tourism. However, most of the potential archaeological sites, except Tikal and Quirigua, are not well known in the international tourism market, and the number of visitors to these sites is very small. The main reason is poor accessibility.
- Archaeological sites around Sayaxché including Ceibal, Aguateca, and Dos Pías has potential to attract international tourists if they are combined with nature-based tourism attractions such as the scenery and wildlife in Lake Petexbatún and boat trip to reach these sites.
- Living indigenous cultures are another highlight of Guatemalan tourism. They, however, are not adequately developed as tourism products, and appropriate manners, in which tourists would make contact with indigenous communities, are not yet firmly established.
- Although Guatemala is not a well-known nature tourism destination in the long-haul market, potential tourism resources that would cater for international tourists exist in such places as Las Verapaces and El Peten, if the accessibility and services are improved.
- A Different Caribbean Region has strength in both natural and cultural tourism resources. The Region may be suitable for developing lakeside and beach resorts.
- Man-made attractions for international tourists including hotels that can be a purpose of visit, lacks in Guatemala.

(2) Tourism Market

- Many tour operators, both Guatemalan and foreign, report that security issues are a serious obstacle to promote tourism to Guatemala. North American market stagnated due to a “travel warning” that addressed security issues in Guatemala although it is not reflected in the 2000 statistics.

-
- Since a large number of Guatemalans and Ex-Guatemalans are living outside of Guatemala, in particular, in the USA and Mexico, the ethnic market would be important.
 - Insufficient attention is paid to the Salvadorians and domestic tourism markets in spite of their sizable market volumes.
 - International visitors tend to concentrate in a few destinations in Guatemala such as Guatemala City, Antigua, Atitlán and its surroundings, and Tikal. Considering Guatemala's tourism potential as well as its diversity, it would be viable to distribute visitor to a wider area including nature areas, spas, and Caribbean beaches.
 - There is a lack of statistical data required for planning and decision-making such as hotel occupancy rates, breakdown of foreign and domestic guests in hotel, and sales information reports.
 - Short operation hours of museums, in particular in Guatemala City, are a constraint for tourism.
 - Introduction of an open sky policy would be necessary to promote international tourism. Although the Civil Aeronautic Law is protecting the national carrier of TACA, there is a "nothing to protect" perception since TACA is not acting as a flag carrier.

(3) Tourism Administration

- The tourism private sector refers to the discontinuity of INGUAT's policy as the most serious problem for the tourism administration in Guatemala.
- It is necessary to introduce a system of Board of Directors to INGUAT to ensure the *continuity of policy*.
- Although a system of Tourism Advisory Board exists under the present law with a purpose to seek opinions from different fields, it is now falling short of its original mandate.
- The private sector does not know very much about the present activities of INGUAT. INGUAT should make more efforts to publicize its activities.
- Although it is under planning, there is not an adequate system for supporting tourism-related SMEs.
- INGUAT's capability to coordinate among tourism-related organizations should be further strengthened.
- Although INGUAT's "Safety to Tourist" system is appreciated by the private sector, some suggest the enforcement of National Civil Polices patrol along the roads connecting major tourism sites.

- Municipalities that have famous tourists sites within their jurisdiction complain that tax revenue from tourism establishments is very small, and that part of INGUAT tax should be returned to municipality.
- Local Tourism Committee is operated on a voluntary basis by members who have their regular works other than the task for the committee, which may arouse concerns for the sustainability of the organization.
- Current registration system of travel agents and tour operators does not check the status of registered establishments: therefore, the list of travel agents and tour operators include many abolished establishments.

(4) Tourism Promotion

- Guatemala has not yet recognized as an important tourism destination in the international tourism market.
- Guatemala still has a “dangerous country” image in the tourism market due to the reports of muggings, lynching of tourists triggered by the rumors of child kidnapping, and other crimes. Under such circumstance, the travel trade will not run the risk of investing in, and sending tourists to, Guatemala.
- There are potential tourism sites that are visited by only a small number of tourists due to a lack of tourism promotion.
- There is a lack of continuity in tourism promotion programs, which make it difficult to establish a favorable tourism destination image.
- Responsibilities of INGUAT, Ministry of Foreign Affairs, and Embassies, which are in charge international tourism promotion, are not clearly defined and there is a need to improve the coordination mechanism.
- All the embassy staff do not have expertise and enthusiasm in tourism promotion, and INGUAT’s promotion policy does not always shared by the embassy staff; therefore the results of promotion activities vary considerably.
- There has not been sufficient collaboration for tourism promotion between INGUAT and the private sector.
- Priority markets for intensive tourism promotion activities should be fixed for a certain period of time, after reaching an agreement with relevant private and public sector organizations.
- Tourism promotion strategy should be elaborated by market segment based on the competitor analysis and the research of market characteristics.
- Events and festivals should be better utilized for promoting tourism to Guatemala, which would include folkloric dance and music, gastronomy, handicrafts.

- Study and promotion of MICE market should be further strengthened taking into account a recent increase of the market segment.

(5) Visitor Facilitation

- Supply of tourist information needs further improvement, in particular, in rural areas taking into account the fact that the greater part of the visitors to Guatemala are traveling independently.
- Interpretation and information in museums and on-site should be provided, at least, in English other than Spanish.
- Any aspects that would give unfavorable impression to visitors, which in turn would harm tourism destination image through mouth-to-mouth communication, should be removed or coped with such as illegal dumping of garbage in riverbanks and roadsides, dirty lavatories, and graffiti covering the walls of archaeological sites.

(6) Considerations for Rural and Indigenous Communities

- Cultural diversity in Guatemala is a valuable tourist attraction. Rediscovery of traditions, caused in part by tourism, strengthens the attractiveness for cultural tourism as well as people's self-identity.
- Although indigenous self-identity is growing stronger, rural-rural migrations do not develop a sense of belonging to locality among rural people. The link of indigenous peoples with the land, so important in terms of environmental knowledge and management in other regions of the world and that tourists are looking for, is not as profound in Guatemala.
- People are open to show ceremonies, costumes and in general their way of life to visitors. In an effort to experience authentic exotic cultures many visitors are not respectful of peoples beliefs and privacy. With a growth of tourist numbers communities may progress on the tourism irritation scale.
- A proliferation of non-governmental organizations supported by national and international funds have fragmented communities and their organizations. A struggle between different community organizations and a lack of concrete actions that improve living conditions in the short-term have created a distrust of programs and institutions by community members.
- The indigenous movement is currently undergoing a restructuring process towards a more socially and regionally integrated model focusing on social development rather than on aspects particular to ethnic issues.
- Land tenure problems make it hard to develop and carry out long term plans for agricultural and ecological sustainability.

- Current and potential tourist sites sometimes have economic, cultural and spiritual value for rural and indigenous people, but the Governmental institutions and private land owners exclude nearby communities from the management and benefits that many of those places may render.
- Poor road conditions make it difficult to access to some communities, creating a contradictory condition in terms of tourism development. On the one hand many tourists are not prepared to spend long hours to reach communities with poor basic and tourist services. On the other hand, these conditions make those communities attractive to a certain tourism market segment.
- The most important mass communication media for the indigenous and rural population is radio, but still more than one quarter of indigenous people have no access to the mass media.
- Seasonality of the agricultural activity creates alternative busy and slow periods in rural communities. Development of supplementary activities to improve community member's economic conditions is needed during the slow periods.
- The lack of training has been identified as a weakness in tourism development. Low levels of education, matriculation and literacy, especially in rural communities and amongst indigenous people exacerbate the problem.
- Visitors' and tour operators' ignorance and lack of respect for local cultural practices have caused and may keep causing violence to tourists like lynching.
- Weakness of the judicial system and legal enforcement agencies cannot control the high delinquency rates throughout the country. A precondition for tourism growth is security especially in the areas tourists concentrate.
- Tourism development should be a tool to strengthening self-identity by promoting cultural rediscovery and pride on traditions and heritage.
- Tourism should help people with different cultural backgrounds to understand each other through cultural exchange, respect for beliefs and practices.

(7) Conservation of Cultural Tourism Resources

- There are not enough technical and financial resources to assure conservation of cultural tourism resources.
- Weakness of the legal framework and institutional definitions for managing cultural resources creates confusion and waste of resources, as well as inconsistency in related programs.
- Due to the poor financial situation of governmental institutions related to conservation of cultural resources, it is common for authorities to consider tourism programs as a

source of direct income. This idea limits the political interest to establish programs with benefit for local communities.

- Local communities lack in motivation to participate in cultural conservation. There is a general unawareness of the Law for the Protection of the Cultural Heritage, and no mechanisms to make it applicable.
- The travel trade rarely participates in cultural conservation. There is a lack of motivation, education and awareness programs for tourist guides and tourists to respect historical sites and local costumes; there are no visitor management programs in sensitive zones, there is no marketing strategies to select and focus on adequate market segments.
- There is a lack of urban management programs that include conservation and protection of historical and local-style buildings, parks, and marketplaces. This has caused deterioration of townscape and gathering places, restricting their possibility to be enjoyed by locals and tourists.
- Inadequate storage conditions of archeological, colonial, and artistic assets provoke deterioration and inhibit their social and tourism use.

(8) Natural Environment

- Deforestation is in progress at an alarming rate due to a rapid population increase combined with extensive agricultural activities and limited alternative livelihoods provided for rural areas.
- Wastewater and solid waste are not treated adequately, which contaminates rivers and lakes and causes health problems.
- Deforestation and cultivation in steep slope areas are causing soil erosion, which also contaminate rivers and lakes.
- Guatemalan System of Protected Areas (SIGAP) needs further improvements; it is necessary to redefine the SIGAP areas based on the vulnerability of ecosystems not to exclude important nature areas, solve land tenure conflicts related to customary land tenure rights, and to clarify management authority of respective SIGAP areas.
- Environmental guidelines for protected areas should be introduced for adequate and effective management, in particular, in nature tourism sites within the protected areas.
- It is recommended to introduce certification systems for ecotourism to promote the understanding of natural ecosystems and sustainable nature tourism know-how among the travel trade, as well as to provide a marketing tool as a "brand."

(9) Tourism Infrastructure and Physical Planning

- A tourism transport network should be established, which is consistent with the development strategies of the JICA Study.
- Road sections that need improvement and construction should be identified in order to promote tourism.
- Future function of the Flores Airport should be determined; whether it remains as a local airport with occasional use of international charter flights or should be improved as an international airport.
- Installation of underground power cables should be promoted in historical districts and archeological sites.
- It is necessary to facilitate the use of Internet to promote the MICE and international tourism markets.
- Meter should be installed at every subscribers' household for a fairer support of water supply cost.
- Current fare systems that charge unreasonably low price for the use of water should be corrected.
- It is worth a consideration to introduce a centralized sewerage treatment system in major tourism centers and the areas with fragile environment including Lake Peten Itza.
- Solid waste management is a key issue to cope with environmental pollution. It might be necessary to introduce a system in which the central government (e.g. INGUAT) would support local government for solid waste management.
- *Design criteria for buildings construction, and design standards for tourism facilities should be established.*
- National codes or measures for the conservation of historical buildings need to be established, on which municipal regulations could be based.
- Use of local construction materials and techniques should be encouraged.
- Urban planning laws or guidelines should be introduced to make towns more attractive. The guidelines should have a certain level of flexibility to fully utilize local characteristics, as well as to comply with the needs of the travel trade.
- It is necessary to define respective roles of relevant government organizations in urban planning.
- Townscape guidelines should be established for towns and villages that have tourism potential.

(10) Macro Economy and Finance

- There is a wide discrepancy in statistical data with regard to population, labor, and economy, which would make a constraint to conduct economic analysis of tourism development projects.
- Past investment performance has been considerably inefficient and, thus, would require a substantial investment if the government wants to achieve the goals set by the Peace Agreements.
- Growth rate of labor productivity in the past 14 years is only 0.55%, which would explain partly an overall insufficiency of investment and modest real GDP growth performance in the past. Most of all, the primary sector, which accounts for 58% of the economically active population, suffers from the lowest labor productivity, and a minus growth over the period.
- *Realization of Peace Agreements objectives and targets is at a higher priority level than any other sub-sector development plans. Achieving a real GDP growth rate of 6%, which is specified in the Peace Agreements, requires a huge amount of investment considering the past investment performance, and would force the government to increase a tax burden and to apply a strict cost – benefit criteria to infrastructure development projects that are needed for tourism development.*

2.1.2. SWOT Analysis of Tourism in Guatemala

SWOT analysis is a tool to summarize existing conditions from the four perspectives of strengths, weaknesses, opportunities, and threats. Table 2.1 shows the results of the analysis.

Table 2.1 SWOT analysis of tourism in Guatemala

	Positive factors	Negative factors
Present	<p>Strengths</p> <ul style="list-style-type: none"> • A good number of competitive tourism products concentrate in a relatively small country. • Indigenous communities proudly maintain their traditional cultures. • Inherent hospitality of Guatemalans would be conducive to tourism development. • A consensus is already made as to the function of tourism as an economic incentive for conservation. • INGUAT secures its own source of budget and has an independent status. • Guatemala's country image improved greatly after the signing of Peace Agreements. • Guatemala is regarded by the international tourism market as a "typical" country that provides opportunities to observe and experience "living indigenous cultures." 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Most of the existing tourism products are of traditional types, and the efforts for developing alternative tourism products are not very active. • Variations of tour itineraries and tourism products are limited. • Relatively low level of education would deter the spread of tourism know-how, in particular, to rural and indigenous communities. • Relationship between tourism and community is not very firm, and tourism benefits are often not distributed to host communities properly. • The central government including INGUAT has not yet gained full confidence among the private sector and local communities. • Environmental deterioration is in progress despite the efforts of governmental and non-governmental organizations, • Inter-agency coordination mechanism, which is indispensable for effective tourism development, is not yet established. • Investment environment in tourism for foreign investors are not good because of political instability and security issues.
Future	<p>Opportunities</p> <ul style="list-style-type: none"> • There are organizations that supports the realization of regional integration such as Mundo Maya Organization and Sistema de Integracion de Centroamerica (SICA), which would favor Guatemala that is "the heart of Mundo Maya." • Increasing popularity of ecotourism and adventure tourism would favor Guatemalan tourism that has potential tourism resources for the market segment. • Lowering agro-products prices will provoke interest of the private sector in tourism development. 	<p>Threats</p> <ul style="list-style-type: none"> • Massive arrivals of tourists could arouse antipathy against tourism, in particular, among indigenous communities • Conservation efforts would fail to receive public supports due to insufficient distribution of tourism benefits. • Concentration of tourists to a small number of existing tourism sites would diminish their attractiveness. • "Dangerous country" images would persist and scare away tourists if existing security issues remain unsolved.

Source: JICA Study Team

2.1.3. Prerequisites for Tourism Development

Tourism development is multi-sectoral in nature; therefore its development strategy should comply with requirements of different sectors. On one hand, tourism strategy should be built on global tourism trends and social and economic conditions that would affect consumers throughout the world. On the other hand, tourism strategy is expected to comply with national, regional, and even local development needs and to solve economic, social, environmental issues at different levels. Based on the above-mentioned understandings, this section summarizes various conditions, requirements, and expectations that should be taken into account to establish the tourism development strategy at the national level.

(1) Changes in the outer environment of tourism

The following global trends should be considered as prerequisites for formulating the tourism development strategy.

- Globalization and moves toward regional integration will continue in the future.
- Globalization and regional integration trends will bring tougher market competitions, which may cause the decline of conventional tourism destinations and the spread of *new tourism types including ecotourism and soft adventure*.
- Tourism markets within the Central America and Mexico will grow faster than any other market segments due to economic and population growth.
- *Guatemalan economy is expected to recover, and in line with the regional trend, tourism market will achieve a healthy growth.*
- Cultural influences from the outside will be increasingly extensive, which may affect Guatemalans toward the two polarized directions: moves toward westernization, and moves toward emphasizing reconstructed Guatemalan ethnicity as a response to the globalization trend.
- A large area of forest would be lost until the deforestation is stopped. It would provoke sanctuarization of forests, and forest-based tourism attractions will have more market opportunities.

(2) Tourism development in the national development context

Tourism is expected to play the following roles in the national development context.

- Tourism is increasingly regarded as a financial source for conservation.
- Tourism is also viewed as a catalyst for cultural revitalization
- Economic diversification is a national issue and tourism is viewed as a prospective economic sector.

- Tourism is a rare economic sector that would create employments in rural areas that are craving for alternative livelihood.
- Rapid population growth in Guatemala needs the strengthening of labor-intensive economic sectors. Tourism is a labor-intensive economic sector and, more importantly, could create employments in rural areas.

(3) Global trends of public administration

The followings are global trends of public administration, which National Tourism Strategy of INGUAT (ENT) is also complies with.

- Democratization and local participation,
- Privatization and involvement of the private sector, and
- Decentralization.

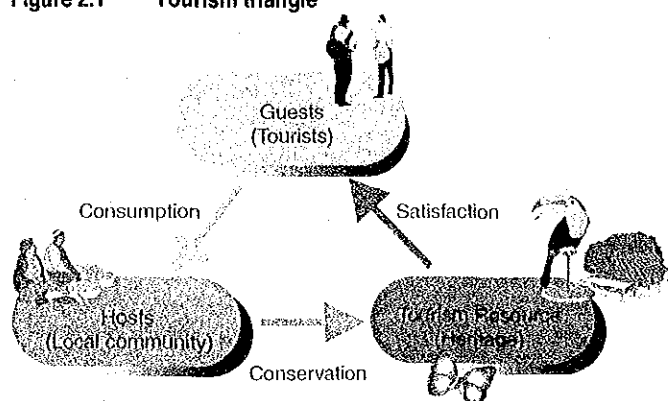
2.2. Tourism Development Strategy

Based on the analysis of existing conditions, the central planning goal of this Study is set as follows:

- Conservation and social development through tourism.

To achieve the goal, a system should be established as shown in Figure 2.1, in which tourism functions as an economic incentive and a cultural catalyst for local community to conserve the nature and cultural heritage. In other words, the Study envisages to introduce a system that motivates people for conservation rather than forces them to do so.

Figure 2.1 Tourism triangle



Source: JICA Study Team

The above system does not formulate by itself. Therefore the public sector is expected to play crucial roles to build the system through deliberate planning and administration. Tourism development measures at the national level should have the three pillars corresponding to the three corners of the tourism triangle; namely, Guest, Host, and Tourism Resource as summarized in the followings:

- Strategy for social development through tourism,
- Strategy for adequately managing and conserving tourism resources,
- Strategy for increasing the competitiveness of the tourism sector.

The following sections explain more details about the 3 components of the development strategy. Development measures, which are discussed in Chapter 3 of this volume, are organized according to the above-mentioned three categories.

2.2.1. Strategy for Social Development through Tourism

Tourism development with social development components is needed not only from a viewpoint of necessity to motivate conservation, but also from a viewpoint to inject “local color” and authenticity into tourism products to strengthen its competitiveness. Involvement of indigenous communities in tourism development is one of the important considerations for this strategy under a co-management scheme.

(1) Introduction of Community Tourism

Community Tourism is considered to be an ideal tool for tourism to “soft-land” on indigenous communities. It should be planned as a tool for community development as well as for community integration by enhancing community’s identity.

(2) Introduction of co-management systems

Co-management is a scheme, in which different entities such as the public sector, NGO, the private sector, and local community cooperate each other manage a tourism site. It is an indispensable arrangement to adequately utilize the private sector and to motivate people for conservation.

(3) Promotion of accommodation development in rural communities

In spite of the fact that most of Guatemala’s tourism attractiveness resides in rural areas including indigenous communities, there is a serious lack of quality accommodation in traditional rural communities. It is necessary to introduce a scheme to promote accommodation development with an international standard as a way to support Community Tourism as well.

(4) Cultivation of good host attitude in rural communities

Good host attitude (anfitrionía) is needed in rural communities that constitute one of the most important aspects of tourism in Guatemala. A program is needed to encourage local people to have good host attitude. The program should not intend to let local people serve tourists but to treat them nicely as a good host.

2.2.2. Strategy for Adequately Managing and Conserving Tourism Resources

Strengthening the management of archaeological sites, historical cities, and nature areas is essential to secure sustainable use of these resources for tourism. Basic ideas for improvement the management are to promote local participation, and to assure financial sustainability with adequate use of tourism.

(1) Improvement of archaeological tourism improvement

Archaeological sites are the most important tourism resources of Guatemala with many management issues and constraints. Focusing on niche market segments is considered important along with local participation and financial sustainability.

(2) Wise use of historical cities

Wise use is a concept of conserving nature areas and cultural assets, in which tourism use generates money for conservation thus ensuring the financial sustainability of conservation projects.

(3) “Green Accommodation” program for Eco-Corridor Formulation

Conservation of nature areas largely depends on the efforts of the private sector, in particular, to establish the Ecological Corridors as discussed later in this section. To tap the opportunity of nature tourism in Guatemala, public supports for improving the quality of lodges are essential.

(4) Introduction of visitor management systems

Introduction of a visitor management system is essential to assure sustainable use of archaeological sites and nature areas. The system does not only ensure conservation but also improve visitors’ satisfaction by reducing congestion.

2.2.3. Strategy for Increasing the Competitiveness of the Tourism Sector

Satisfying tourism market needs makes a prerequisite to achieve social development and conservation. The followings are measures to increase the competitiveness of the tourism sector.

(1) Introduction of a certification system for sustainable tourism

Certification system for sustainable tourism has two functions: to promote environmental knowledge among the travel trade, and to facilitate marketing of ecotourism products as a “brand.”

(2) Introduction of financing systems for small-scale tourism projects

Complying with the trends of privatization and decentralization, it is necessary to introduce financing systems for small and micro enterprises.

(3) Strengthening of tourism promotion

Tourism promotion needs strengthening to reach targets market more efficiently, and some additional activities would become necessary to sell newly proposed tourism products in the Study.

(4) Enforcement of tourism administration

Institutional strengthening is necessary to coordinate among different stakeholders that formulate the above-mentioned tourism triangle. It is also needed to set up a mechanism to implement proposed projects and programs in this Study.

2.3. Marketing Strategy

Marketing Strategy is formulated to comply with the Development Strategy as discussed previously. The strategy is described according to the 3 axes: geographic market segment, tourism product segment, and INGUAT's Tourism "Theme" Region. The conclusion of the marketing strategy is summarized in a table at the end of this section.

2.3.1. Strategy by Geographic Market Segment

Characteristics of geographical tourism market are influenced by distance to the destination, leisure time availability, social norms, life styles, and values. Generally speaking, visitors from distant countries tend to stay a longer period covering a wider area than those from neighboring countries. This is why Guatemala is a single destination for 91% of the visitors from neighboring countries, while it is a single destination only for 47% of those from North America, 53% from South America and Caribbean, 28% from Europe, and the 25% from "others" including Asia, according to JICA Study Team's Survey. It is also noted that visitors from the long-haul market tend to place importance on observing exotic cultures and sceneries, while those from the short-haul tend to prefer leisure activities and relaxation. Based on this understanding, geographic market segments are discussed by the order of distance to Guatemala.

(1) Domestic market

JICA Study Team estimates that the domestic market occupies approximately 40% of the total hotel bed-nights in Guatemala. Due to the past economic and social problems, domestic market has *not been given proper attention it deserves*. However, as economic and social conditions of Guatemala stabilize, it is expected to resume a healthy growth.

Domestic tourism often offset the seasonality of international visitors thus contributing to the improvement of tourism establishments' operation. It is also noted that domestic tourism incubates tourism establishments, which would later cater for international visitors, as evidenced by the fact that countries with competitive tourism enterprises generally have a large domestic tourism market. Domestic tourism also enhances national identity and pride. In this context, the domestic tourism in Guatemala needs further promotion.

Business, MICE, beach resort tourism, and nature tourism are considered relatively important for the domestic market. Since marketing information about the domestic tourism is scarce, it is recommended for INGUAT to conduct a domestic visitor survey to obtain more detailed market profile.

(2) Central America and Mexico

Intra-regional tourism market will continue to have a great presence for Guatemalan tourism with a large market share (49% in 2000) and a high growth rate (17.2% during the 1996-2000 period). A steady population growth and stable political and economic conditions will consolidate this market segment in the future. Within the market segment, Salvadorians continue to be the most important since the nature and cool climates in

Guatemala provide them with great motivations to come to Guatemala. Travel purposes such as beach, shopping, colonial cities also will be important to lure out Salvadorians. Mexicans and Hondurans living in border cities currently make short trips to Guatemala for shopping and visiting friends and relatives. They may be interested in nature and beach resort tourism in Guatemala like Salvadorians if proper tourism promotion activities are conducted. Mexicans, mostly from major urban centers, traveling in the Mundo Maya would be interested in visiting Guatemala's archeological sites if adequate land or air connections are available.

Central American countries other than bordering countries (Nicaragua, Costa Rica and Panama) will be a second important sub-segment. Considering the trend for regional integration, business travel and MICE would be important market segments.

(3) North America

The share of the North American market (USA and Canada) was 28% with an annualized growth rate of 8.4% during the 1996 - 2000 period). WTO predicts that people in the market will travel more frequently for shorter periods more independently, and look for relaxation or experiences "to get away from all". Access to the destination, quality of facility, and "ambiance" are reported to be relatively important. It is noted that the ethnic market is an important sub-segment due to a large number of Guatemalans living in the area

Visitors to Guatemala seem to be familiar with myths and images associated with Mayan cultures and therefore cultures together with archeological sites will continue to be core tourism products for this market. It is partly due to the competition for beach resort tourism with the Caribbean destinations. Therefore, it is important to provide and/or improve access to destinations and tourism sites in order to facilitate intensive touring, which is a characteristic of the market. Effective time use and quality of the travel experience are keywords for this market. Combination of core tourism products with nature and resort elements such as spa and beaches may be a possibility to diversify tourism options. Since the ethnic market is sizable, VFR and religious trips are relatively important.

(4) Other Americas (South America & Caribbean)

This geographic market segment occupies only a minor market share (around 5% in 1996-2000 with a 10.4% growth rate in the same period). However, population growth and economic prospects, in particular, for large economies such as Brazil, Argentina and Chile, as well as cultural ties would provide rationale to pay attention to the market.

Since South America abounds in competitive nature destinations such as Amazon and Iguazu Falls, Mayan cultures will be a major tourism product for the market. Thanks to the cultural and historic ties, colonial cities, churches, and MICE could be supplementary tourism products.

(5) Europe

Europe is an important geographic market segment accounting for 14% of the market share with a growth rate of 5.2% during the 1996 - 2000 period. The long-haul market travels longer period than any other market segments, and often combines a touring with a stay at a beach destination. It is noted that countries in Central and Eastern Europe such as Russia, Hungary, Czech, and Poland will be important in the long-term.

Archaeology and indigenous cultures are, and will be the core tourism products for this segment. However, efforts should be made to make them stay in Guatemala after the touring of archaeological sites and indigenous cultures. Possible locations would be the lakeside areas of Izabal, Peten Itza, and Atitlan, as well as beaches in the Caribbean. It would be worth an efforts to introduce nature tourism to the market considering their keen interest in this type of tourism in other countries. Tourism facilities and services that do not meet their standards are reported to be constraints to introduce new tourism products.

(6) Asia and others

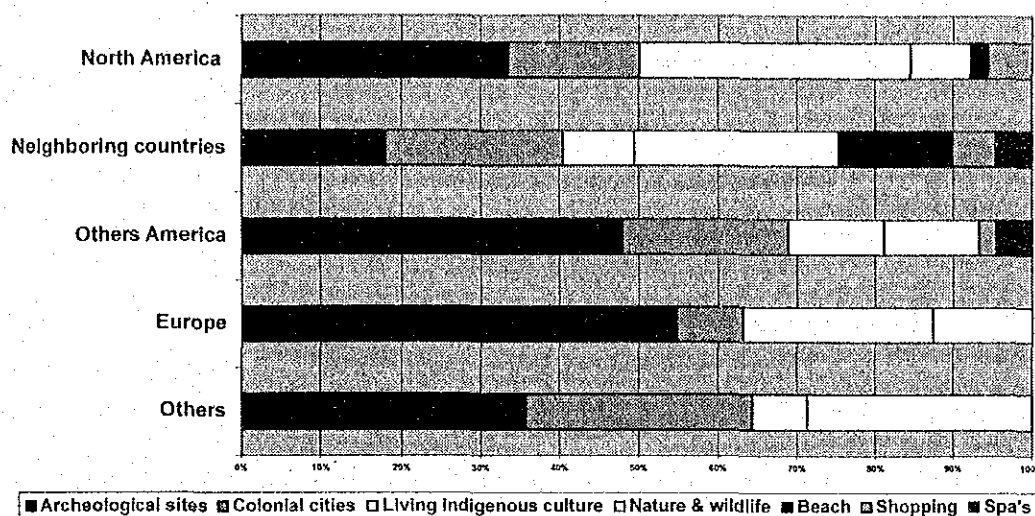
Asia and the Pacific represent just 2.8% of the market share with annualized growth rate of 8.3% during the 1996 - 2000 period despite its large market volume of outbound tourism. Japan, Korea, Taiwan, Australia, and New Zealand are the countries that can generate tourists to Guatemala, and are considered as the short-term targets. The market is one of the fastest growing tourism markets in the world; therefore it will be important in the long-term.

Like Europe, archaeological sites and indigenous cultures will be the core tourism products for the market. Considering Guatemala's limited presence in the market segment, selling its core products has priority over diversification of products.

2.3.2. Strategy by Tourism Product Segment

As shown in Figure 2.2, archeology, living indigenous culture and colonial cities, are the most important products for Guatemalan tourism. For neighboring countries, nature and beaches are relatively important respectively.

Figure 2.2 Principal tourist attractions to Guatemala



Source: JICA Study Team Survey, March, 2001

(1) Archeological tourism

Archaeological tourism is the most important tourism product in Guatemala although it is heavily concentrated in Tikal. Although archaeological sites spread all over Guatemala, the result of tourism resources evaluation indicates that developing/ improving archaeological sites in El Peten has the highest priority. There are archeological sites already receiving certain numbers of visitors such as Uaxactún and Yaxhá and these places should be improved to mitigate the congestion of Tikal.

Interpretation of archeological sites is usually made focusing only on the features of visited site. Magnificence of Tikal may diminish other archeological sites when it is visited first. Therefore, for an optimal use of archeological sites and the distribution of visitors, a description technique has to be developed that may explain thematic and time-sequential relationships among different archaeological sites. An example is Yaxiá's relationship with Tikal, and the ignorance of the facts leads to the notion that "it is more or less the same". The Palenque -Tikal relationship is similar to the Tikal - Yaxhá relationship, and the combination will have a strong appeal to the international market and could be a future axis in the Maya World, if adequate access is provided.

Visit to minor archaeological sites could be combined with nature tourism. Possible locations would be archaeological sites in the vicinity of Sayaxche and in Maya Biosphere Reserve.

(2) Living indigenous cultures

This is another important tourism product of Guatemala. Up to this moment, the relationship between tourist and indigenous populations is confined within the marketplaces. In order to develop a better understanding and therefore a more satisfactory experience for both sides, an interaction framework for this relationship has to be developed.

Living indigenous cultures is a core tourism product for middle and long-haul markets. Community Tourism is expected to play an important role to achieve a better relationship *between indigenous communities and visitors.*

(3) Colonial cities

So far, Colonial cities of Guatemala is a wording that refers basically Antigua even if there are other colonial cities in the country. However, there are other cities that could be as attractive as Antigua if proper beautification and urban planning is undertaken. This is the case for Flores Island that *could become another attractive colonial city that would be a good supplement to El Peten PTDA.* Quetzaltenango is another potential place if its historical buildings are properly used for tourism. Tourism improvement of other colonial cities is needed also from the viewpoint of relieving Antigua from heavy tourism traffic.

(4) Nature tourism

It is widely accepted that Guatemala has better nature and wildlife conditions than Costa Rica. Due to geographical features, Guatemala has a variety of climates and sceneries. Possibilities to combine nature with other tourist products such as colonial cities, archeology will enhance tourism attractiveness. Nature products may be an important supplementary product to archeology and living indigenous cultures for the middle and long haul markets, and an important tourism product for the short-haul market.

River cruise is another potential tourism product of Guatemala. Rivers have been used for transportation since the Mayan times; therefore rivers are also authentic approaches to archeological sites. *There are two potential areas for river cruise: a) the Pasión and San Pedro Rivers that are tributaries of the Usumacinta River, and b) the Izabal Lake area including Río Oscuro, Río Dulce- Livingston area.* River cruise should be introduced to combine access, sightseeing, and adventurous feel in the trip. Agro-tourism would have potential in the domestic market, and the short- and middle-haul international markets.

(5) Resort tourism

Each resort tourism as a supplementary attraction of cultural and archeological resources will be an important element to cater to long haul markets as well as for domestic and Salvadorian markets. Possibilities are in and around Peten Itza Lake, Izabal Lake and Río Dulce if adequate facilities are developed. Livingston with a unique Caribbean atmosphere is another possible location.

(6) Cruise ship tourism

Guatemala is in the Caribbean Sea although this is not very noticeable. However, cruise ship companies in the Caribbean are always in search of new possible destinations. Puerto Barrios already has some cruise ship arrivals. It will be important to introduce cultural, natural tourism sites for day-trip from the port of call.

(7) Special interest tourism

Special interest tourism (SIT) is an important tourism segment for Guatemala considering its types of tourism resources. Bird watching is an immediate opportunity and there are a number of tourism opportunities such as caving, mountain climbing, archaeology, ethnology etc. Pilgrimage to Esquipulas and other churches in highlands would be a theme for SIT, especially for ethnic market in the USA, Salvadorians and other Central American markets.

(8) MICE

Guatemala is the largest city in Central America with a sufficient hotel accumulation to accommodate MICE visitors from Central America. Given the attractions of the vicinities (Antigua, Mixco Viejo, Ixmiché, Chichicastenango, Sololá and so forth), important for pre and post convention or congress events and also the auditorium facilities (Tikal Futura), the capital city would be an optimal location for the MICE market. So far, the city lacks in an entity in charge of activities to promote on a regular basis this market and that could work in close collaboration with Guatemalan associations (architects, medical, engineers, etc.) in order to create an MICE market image for the country. MICE market for inner location of Guatemala would also help to develop facilities and services that would improve current conditions.

2.3.3. Strategy by Tourism Region

(1) Tourism Region I: Modern and Colonial Guatemala

Tourism Region I consists of the 2 different tourism destinations: Guatemala City and Antigua Guatemala. The former is the largest city in Central America and is basically a business destination rather than a tourism destination. The latter is a typical colonial city for tourists with a good access to the Aurora International Airport. Therefore, future directions for the two cities would be completely different.

Guatemala City's potentials would be those related to businesses. Convention and conference at national and regional levels is an immediate opportunity and would continue to be important in the future.

Antigua's markets are more long-haul than that of Guatemala City, and it will be a favorite destination for most of the geographic market segments. Antigua should enforce its role as the southern international gateway city to Mundo Maya. In this context, it is recommended to enhance its function to provide information not only of Antigua but also of Guatemala and even the Mundo Maya area.

(2) Tourism Region II: Living Indigenous Highlands

Tourism Region II has cultural attractions, nature attractions, and a lake resort area around Lake Atitlan. Therefore it will attract visitors from both long-haul and short-haul markets. It offers diverse tourism products and its future strategy would further diversity tourism types within the Tourism Region.

Atitlan Lake is a typical destination that needs "consolidation" due to limited land availability. Development efforts should be toward the increase of per visitor expenditure rather than the increase of visitor arrivals.

The Tourism Region has enormous potentials for community-based tourism products due to a high concentration of indigenous population that proudly maintains their cultural traditions. This type of tourism products would be basically for visitors from the long-haul market such as North America and Europe. There are nature-based tourism resources that could be combined with cultural tourism.

(3) Tourism Region III: Mayan Adventure

Tourism Region III is evaluated to be the most competitive tourism destination in Guatemala according to the results of tourism resources evaluation. Although visitors to the area are mostly those from the long-haul market countries, road improvement between Coban and Flores would facilitate domestic visitor arrivals in the near future.

The area is currently a typical "one-attraction" destination being heavily dependent on Tikal. Expected visitor growth may cause congestion and deterioration of the World Heritage site. Therefore, efforts should be made to develop other archaeological sites, and tourism products other than visiting archaeological sites.

Nature tourism is evaluated to have good potentials, and rivers and wetlands are unique *tourism resources in the Mundo Maya area*. Another possibility to diversify tourism types is to gradually convert the Lake Peten Itza to a resort destination like Lake Atitlan by developing small to middle scale accommodations and community-based attraction around the lake.

(4) Tourism Region IV: A Different Caribbean

Tourism Region IV is unique in that, unlike other tourism destinations in Guatemala, it has tourism resources appeal to mass market: good beaches. Beaches in this Tourism Region is evaluated to be more attractive than beaches in the Pacific Coast but it is farther from major cities in Guatemala.

In this context, beaches in this area should be developed for both domestic and international visitors with more up-market orientation. Since the Tourism Region is located on an important tourism circuit between El Peten and Guatemala/ Antigua., it could be a resort destination for European tourists who prefer combining a touring itinerary with a stay at a beach destination.

(5) Tourism Region V: Natural Paradise

Tourism situation of Tourism Region V is expected to change drastically due to the proposed road improvements. The area is expected to be a crossroad of transport network, and the increasing number of visitors will stay in the area as a stopover to reach El Peten.

Since the area's principal attraction is nature-based tourism, intensive efforts are needed to conserve the surviving forests. The area also has potentials for agro-tourism capitalizing on its "coffee" image, and adventure and activity tourism such caving and rafting. Domestic tourists and Salvadorians are principal clientele at present but, in the future, more long-haul tourists will come to this area on their way to El Peten.

It is important to publicize the attractiveness of overland trip via Tourism Region V because the travel route has to compete with airlines. It is recommended to give a naming to the travel route between Guatemala/ Antigua – Flores to increase market awareness.

(6) Tourism Region VI: Guatemala for Discovery

Tourism Region VI's principal attraction is the Church in Esquipulas that is attracting visitors from all over Central America. Visitors from El Salvador will continue to be important but efforts should be made to attract visitors from more distant markets. Due to its proximity to Guatemala City, opportunities exist to develop tourist facilities targeted at Guatemalan families and visitors from neighboring countries.

(7) Tourism Region VII: Pacific Coast

Tourism Region VII will continue to be a short-haul beach destination attracting domestic and Salvadorian visitors. Future prospects of the both markets seems to be promising due to the improvement of the economies and a growth of market volume caused by a rapid population growth. Due to the short distance from major cities in Guatemala, the Tourism

Region will maintain an advantage over the Caribbean beaches. The area has market opportunities to build tourist facilities targeted at domestic tourists such as theme park, recreational park, zoo, and museums.

2.3.4. Conclusion

Table 2.2 summarizes the marketing prospective of respective geographic market segments, tourism product segments, and Tourism Regions.

Table 2.2 Evaluation of market opportunities

	Domestic	C.A. & Mexico	N. America	S. America	Europe	Others
Archeological tourism	High	High	High	High	High	High
Indigenous cultures	High	High	High	High	High	High
Colonial Cities	High	High	High	Middle	Middle	Middle
Nature Tourism	High	High	Middle	Middle	Middle	Middle
Resort Tourism	High	High	Middle	Middle	Middle	Middle
Cruise	High	High	High	Middle	High	Middle
SIT	High	High	High	Middle	Middle	Middle
MICE	High	High	Middle	Middle	Middle	Middle
Modern and Colonial Guatemala	High	High	High	High	Middle	Middle
Living Mayan Highlands	Middle	Middle	High	High	High	High
Mayan Adventure	Middle	Middle	High	High	High	High
A Different Caribbean	High	High	Middle	Middle	Middle	Middle
Natural Paradise	High	High	Middle	Middle	Middle	Middle
Guatemala for Discovery	High	High	Middle	Middle	Middle	Middle
Pacific Coast	High	High	Middle	Middle	Middle	Middle

Note: □ = Low, ■ = Middle, ■ = High

Source: JICA Study Team.