

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

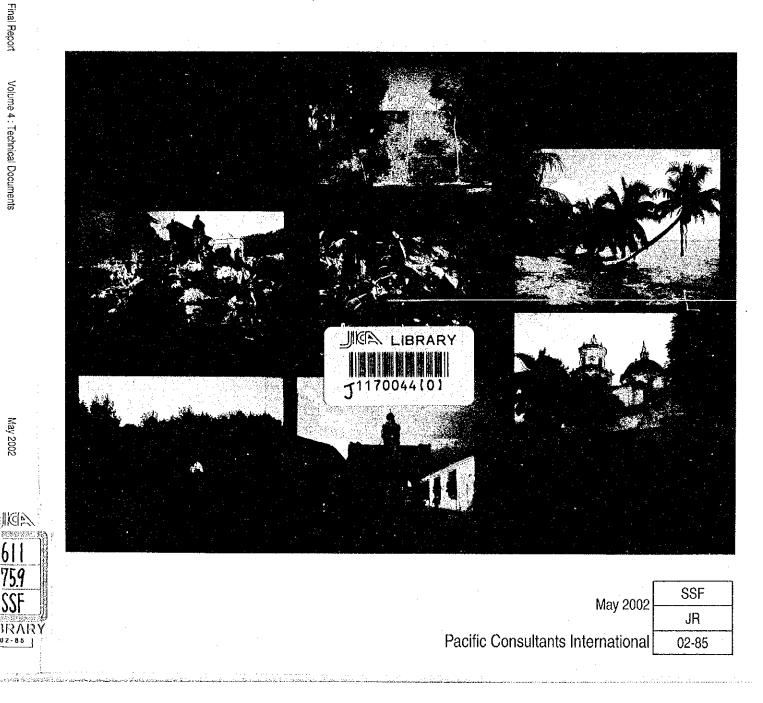
JICA

No,

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Study of National Tourism Development for the Republic of Guatemala

Final Report Volume 4: Technical Documents



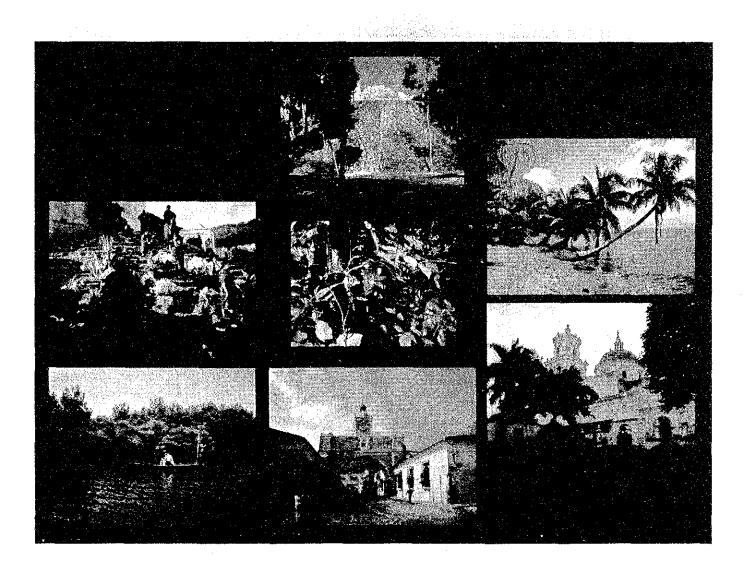


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> Final Report Volume 4: Technical Documents



May 2002

Pacific Consultants International



The following exchange rate is applied in the Study: US\$1 = Quetzal 8 = Yen 121

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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

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Takao Kawakami President Japan International Cooperation Agency

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 polices and measures for the future development of Guatemala.

Very truly yours,

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

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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 Protegidos
EIA	Environmental Impact Assessment	Evaluación del Impacto Ambiental
EIRR(TIRE)	Economic Internal Rate of Return	Tasa Interna de Retorno Económica
ENT	National Tourism Strategy	Strategia Nacional de Turismo
FEGUA	Railway of Guatemala	Ferrovias de Guatemala
FIRR (TIRF)	Financial Internal Rate of Return	Tasa Interna de Retorno Financierra
FIS	Social Investment Fund	Fondo de Inversión Social
FIT	Foreign Independent Tourist	
ODIGUA	National Fund for Indigenous Development in Guatemala	Turistas de Comodidad
ONACON	National Fund for Conservation	Fondo Nacional para el Desarrollo Indígena en Guatemala
ONAPAZ		Fondo Nacional para Conservación
ONTIERRA	National Fund for Peace	Fondo Nacional para la Paz
	National Fund for Land	Fondo Nacional para las Tierras
-500 -TN	Solidarity and Community Development Fund	Fondo de Solidaridad y Desarrollo Comunitario
	Northern Transverse Belt	Franja Transversal del Norte
GOG DAEH	Government of Guatemala	Gobierno de Guatemala
	Institute of Anthropology and History	Instituto de Antropología e Historia
DB (BID)	Inter American Bank	Banco Interamericano de Dessarrollo
EE (EAI)	Initial Environmental Examination	Examen Ambiental Inicial
GSS	Guatemalan Institute of Social Security	Instituto Guaternalteco de Segridad Social
INAB	National Institute of Forestry	Instituto Nacional de Bosques
NDE	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 Tourist Commission	Instituto Guatemalteco de Turismo
NSIVUMEH	National Institute of Seismology, Volcanology, Meteorology and Hidrology	Instituto Nacional de Sismologia, Vulcanologia, Meteologia e Hidrogia
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	
LTC (CLT)	Local Tourism Committee	Agencia de Cooperación Internacional del Japón Comité Local de Turismo
MAGA		
MARN	Ministry of Agriculture, Livestock and Food	Ministerio de Agricultura, Ganadería y Alimentación
MICE (RICCE)	Ministry of Environment and Natural Resources	Ministerio de Ambiente y Recursos Naturales
MICIVI	Meeting, Incentive, Convention and Event	Reuniones, Incentives, Congresos, Convenciones y Eventos
MICUDE	Ministry of Communication, Infrastructure and Housing	Ministerio de Comunicación, Infraestructura y Vivianda
NGO (ONG)	Ministry of Culture and Sports	Ministerio de Cultura y Deportes
NPV (VPN)	Non-Governmental Organization	Organización No Gubernamentalcs
	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 Integracion de Centroamerica
SIGAP	Guatemalan System of Protected Areas	Sistema Guatemalteco de Áreas Protegidas
SIT (TIE)	Special Interests Tourist (or Tourism)	Turístas de Interes Especial
SME (PyME)	Small and Micro Enterprise	Pequeña y Microempresa
SWOT (FODA)	Strengths, Weaknesses, Opportunities and Threats	Fortaleza, Debelidad, Oportunidad y Amaneza
UNDP (PNUD)	United Nations Development Program	Programa de las Naciones Unidas para el Desarrollo
URNG	Guatemala National Revolutionary Unit	Unidad Revolucionaria Nacional Gutemalteca
VFR (VdAyP)	Visit Friends and Relatives	Visita de Amigos y Parientes
	TAIDILE LIGHUD GHU FICIOLINGS	TVISIA DE AMILIOS Y CABENTES

1. RESULTS OF THE SURVEYS

1.1. Questionnaire Survey at Airports and Border Crossing Points

1.1.1. Objectives of the Study

A questionnaire survey was conducted at 12 boarder-crossing points and two international airports. It aimed at obtaining information from international visitors to Guatemala on the following parameters:

- Demographic profiles;
- Travel patterns and tourism flow within Guatemala;
- · Evaluation of Guatemalan tourism services; and,
- · Tourism expenditure,

The survey results provided a basis for establishing the following aspects of the national tourism master plan as well as for the regional tourism master plans for the three PTDAs:

- Creation of a development concept and strategy;
- · Identification of development targets by tourism region, and
- · Economic and financial analysis of proposed projects.

1.1.2. Outline of the Survey

(1) Sampling method

The universe was the foreigners visiting Guatemala by land or air regardless of the reason to travel. The sample was composed of 3,050 respondents. A stratified random sampling method was used to select the sample. Stratification criteria for the sample were nationality and port of entry. It was designed based on the number of foreigners who entered the country from respective border crossing points in the year 2000, which was provided by INGUAT. Entry figures were used because departure figures at border crossing points were not available.

(2) Survey period

The survey consisted of the two phases as shown below. It took 7 days (Monday to Sunday) to complete each phase.

Phase-I survey

March 2001.

1,536 samples.

Phase-II survey

July 2001.

1,514 samples.

(3) Survey sites

According with afore mentioned methodology, surveys sites were the following:

Border Country	Site
International airports	La Aurora
	Anacleto Maza Castellanos
El Salvador	Valle Nuevo
	Pedro de Alvarado
	San Cristobal
	Nueva Anguiatu
Honduras	Agua Caliente
÷	El Florido
Mexico	Tecun Uman
	El Carmen
	La Mesilla
Belize	Melchor de Mencos

Source: JICA Study Team

(4) Surveyors

JICA Study Team subcontracted the survey to Grupo de Servicios de Información S.A. (Generis Latina), which have experiences in conducting similar visitor surveys. A team of 20 interviewers who received special training for this task undertook the filed work. In addition, three supervisors randomly validated 35% of the total number of interviews.

(5) Questionnaire

JICA Study Team designed a questionnaire as shown in Table 1.1. The questionnaire was presented in five different languages: Spanish, English, French, German and Italian. Respondents completed the questionnaire by themselves.

1.1.3. Results of the Survey

Results of the survey are shown from Table 1.2 to Table 1.7. Definitions of words used in the tabulation tables are as follows.

Concept	Description
Independent tourist	Those who traveled for holiday and did not used any kind of package tour.
Organized tourist	Those who traveled for holiday and did used a package tour bought in the origin country, in Guatemala or in a neighboring country.
VFR	Those who live outside Guatemala and arrived to the country to visit friends and relatives.
Business	Those who traveled for business/trade, MICE, Employment/work, volunteer work and others.
North America	United States and Canada.
Neighboring Countries	Central American countries (Belize, El Salvador, Honduras, Nicaragua, Costa Rica, Panama) and Mexico.
Mexico and C.A.	Central American countries: Belize, El Salvador, Honduras, Nicaragua, Costa Rica, Panama and include Mexico.
Others Americas	South American countries and Caribbean countries.
Other countries in Central America	Nicaragua, Costa Rica and Panama.
Europe	All European countries (including East Europe countries)
Olhers	All others (Near, Middle and Far Asia & Oceania).
Third-age	People aged 60 years old and more.
Married	Married, living together, divorced, widowed.

Source: JICA Study Team

DEA	Table 1.1 Questionnaire for the visitor st R VISITOR: Good morning/afternoon. My name is	
know	n here in Guatemala and Central America. In order to improve the	and I work for Generis Latina, a market research company w
neea	s and opinions of the fourists who visit to Guatemala. We appre-	ciate your help by answering this questionnaire. If won't take lon
THAI	NK YOU.	
<u>1.</u> 1.	QUESTION How many times have you visited Guatemala including this visit?	INAIRE
	They many times have you visited Guatemala including this visit?	times
	PLEASE COMPLETE.	bines
2.	What was de main purpose of your visit to Guatemala?	1. Holiday Go to Q 3
		2. Visit friends and relatives Go to Q 7
	CIRCLE ONLY ONE PLEASE	3. Learning Spanish Go to Q 7
		4. Meeting, Incentive travel, conference, and event Go to Q 7 5. Business/trade Go to Q 7
	IF YOU CHOOSE ITEM 2 TO 7 PLEASE PROCEED TO QUESTION 7	6. Employment/work Go to Q 7
		7. Others (please specify) Go to Q 7
3.	What influenced you to make the decision to visit Guatemala?	1. Experiences of former visits
	PLEASE CHOOSE AN THAT INDIV	2. Travel agent's suggestion
	PLEASE CHOOSE ALL THAT APPLY.	3. Brochures 4. Advertisement in TV
		5. Advertisement in magazines and newspapers
		Magazine and newspaper articles
		7. TV programs and movies
		8. Friends and family
		9. Guatemalan tourist office 10. Internet
		98. Others (please specify)
1.	You might have considered other destinations before you finally	
	chose Guatemala. What was the most prospective destination	· · · · · · · · · · · · · · · · · · ·
5.	next to Guatemala? PLEASE COMPLETE What was the most Important reason for choosing Guatemala?	
		Lower price Shorter travel time
	CIRCLE ONLY ONE PLEASE	3. Better security conditions
		4. Richer tourist attractions
		5. Better tourism-related services
		6. More appealing shopping items 7. More relaxing atmosphere
		98. Others (please specify
6.	What was your principal attraction in Guatemala, circle the most	1. Archaeological sites
	important?	2. Colonial cities and architecture
	CIRCLE ONLY ONE PLEASE	Iving indigenous cultures A. Nature and wild life
	ONOLE ONE FONE FLEASE	5. Beach
		6. Spa
		7. Museums
		8. Shopping 9. Sport activities (mountain climbing, diving, fishing etc.)
		9. Sport activities (mountain climbing, diving, fishing etc.) 10. foods
		11. Hotels/ resorts
		98. Others (please specify
7.	What did you do while you were in Guatemala?	1. Visited archaeological site (s)
	PLEASE CHOOSE ALL THAT APPLY	 Visited colonial city (s) and architecture Visited indigenous marketplace (s)
		4. Visited nature areas
		5. Enjoyed a stay at beach
		6. Enjoyed a stay at spa resort (s)
		 Visited museum (s) Shopped for handicraft (s)
		 Shopped for items other than handicrafts
		10. Enjoyed sports activities (mountain climbing, diving, fishing,
		etc.)
		11. Enjoyed local food (s) 98. Others (please specify
8.	Did you use package tour Guatemala?	1. Used package four from your country of residence to
		Guatemala
	PLEASE CIRCLE ONLY ONE	2. Used package tour (s) purchased in Guatemala
		3. Used package tour (s) purchased in a neighboring country o
		Guatemala (Mexico, Belize, Honduras, El Salvador) 4. Did not use package tour
ġ.	Who is your travel companion?	Alone
		2. Spouse
	PLEASE CHOOSE ALL THAT APPLY.	3. Family (spouse and children)
		4. Friend (s)
		5. Family and relative (s) 6. Family and friend (s)
		7. Business associate (s)
		98. Others (please specify

C Study of National Tourism Development for the Republic of Guatemala

11.	PLEASE COMPLETE How many nights did PLEASE COMPLETE What cities did you st order of your itinerary PLEASE COMPLETE \$	you spend in Gi ay at in Guatem ?		o lhe				Night (s)			
	PLEASE COMPLETE What cities did you st order of your illnerary PLEASE COMPLETE	ay at in Guatem ?		o lhe				Might (a)			
12.	What cities did you st order of your illnerary PLEASE COMPLETE P. 12	ay at in Guatem ?	ala according to	o lhe		·····					
12.	PLEASE COMPLETE	17	ala according to) lhe			······	_ 14i9£tt (5)			
	↓ P. 12				13.	of the typ	e of accommo	dation used?			
						AND STA	YED 4 NIGH AMPING, YOI	IS AT A HOT	ETEN 5 NIGHTS EL AND ONE SHOULD BE (See		
	Name of place	P. 13 Hotel, lodge	P. 13 Aparthotel (suites)	P. 13 Friends & relative's home		P. 13 Your own residence	P. 13 Camping	P. 13 Home s	(pls.		
	Peten	4					1		Specify)		
			······								
			······································								
				<u> </u>							
14.	What are used any in		714.	<u> </u>							
14.	What are your combin Guatemala? PLEASE CHOOSE A			2. Me 3. Be 4. Ho 5. El 6. Ott 7. Co 8. US 9. Ca 10. Co	exico Ilize Indura: Salvac her co Juntrie: SA Inada Juntrie:	dor untries in Cent s in the Caribbe s in South Ame	ral America ean				
15.	What is your entry poir	nt to Guatemala?		1. Aur	rora In	blease specify ternational Airp	ort 1	10. Nueva	Anoviatú		
	PLEASE CIRCLE ON			3. Pue 4. Livi 5. Sar 6. Pue 7. Val 8. Peo	erto Qi le Nue	arrios n más de Castilla uetzal evo Alvarado	3	 Agua C El Florik El Cincl El Cincl Tecún I El Cam El Cam El Nara Bethel 	aliente Jo nado Jmán nen njo		
16.	How much have you s the expenditures you r please include the air t hotels? PLEASE USE ANSWER AND INDIC PERSONS	made outside of (fare, tour packag EDOLLARS FOR	Buatemala, 9 fare and 1 YOUR		\$			18. Melchor de Mencos			
17.	While in Guatemala, h PLEASE USE DOLLA AND INDICATE THE	NUMBER OF PL	ANSWER ERSONS	US	\$			#perso	ns		
18.	Could you give us an i have spent in Guatem	ala for the followi	ng purposes?	Others	d beve rtation g iment :	erage and entrance fe	rage ()% ()% ()% ()% ()%				
19.	How do you rate de ac THE ISSUE DOESN ONLY ONE OPTION)% NUMBER 1 DVEMENT. PL	MEANS THAT EASE CIRCLE		
			No nee improve	dfor	Some	need for vement	Needs imp	rovement	Strong need for		
1. Sec			1			2	3		improvement 4		
3. Ava	nners of street vendors	& night activities				2	3		4		
4. Ava	ilability of good guides		1			2	3		4 4		
5. Ava 6. Ava	illability of good food an illability of good hotels	a restaurants	1			2	3		4		
7. Cha	inces to experience rura	al community life	1			2	3		4 4		
8. Ava 9. Fnv	ilability of attractive sho ironmental protection	pping items	1			2	3		4		
10. To	urist information			<u>-</u>		5	3		4		
11. Re	liability and quality of to ixi service an public tran	our operators	1			2 2	3		4		

20.	How Interested would you be in visiting Guatemala again? CIRCLE ONLY ONE PLEASE	Not interested in visiting Guatemala again. Interested in visiting Guatemala again.
IF YO	U CHOSE ITEM 2 CONTINUE, IF NOT GO ON TO Q 22	
21.	Which area would you like to visit again, in particular?	
22.	What aspects of you staying in Guatemala did you not like?	
23. THE	If you could decide on the type of tourism project that would enhance Guatemala's fourism attractiveness, which of the following projects would you choose?	 Life museum (a concept to facilitate tourists visit and stay in indigenous community to experience and fearn their cultures) Design and quality improvement of handicraft Canopy walkway (hanging walkway over forest to observe tree canopy) Lodges and facilities for wildlife observation (quetzal etc) River cruise that visits archaeological sites and nature areas on the way. Restoration and visitor facility development at archaeological sites. Agro-tourism that would enable tourists to stay in farm, and experience nural ways of life Seaside beach resort development. Lakeside resort development (Lake Isabal, Peten Itza, etc.) Spa resort development of hightand. Tourism improvement of hightand. Dourles minprovement of access roads to tourism sites. Rail Journey in steam locomotive. Signs and interpretation boards at tourism sites
P.1	COULD AI	VSWER AS APPROPRIATE Gender 1. Male
P.2	·	2. Female Age group (Please circle only one)
1.4		1. under 19 2. 20-29 3. 30-39 4. 40-49 5. 50-59 6. over 60
P.3		Country of residence
P.4		Marriage status 1. Single 2. Living together 3. Married 4. Divorced 5. Widowed
P.4		Education 1. Grade school 2. High school 3. University/college 4. Postgraduate

Source: JICA Study Team

		n segme	nts tor C	auatema	ian touris	<u>sm (1)</u>			
`			Gender					. A	lge grou
	Total								
	case	Male	Female	-19	20-29	30-39	40-49	50-59	60
	%	%	%	%	%	%	%	%	: %
Whole Visitor Average	100.0	67.1	32.9	3.3	29.1	31.0	21.7	10.6	
Whole Visitor Average	100.0	07.1	32.5	3.3	29.1	31.0	21.7	10.6	4.:
1. Independent Tourists	100.0	63.1	36.9	3.3	36.1	30.5	18.0	8.4	3.0
2. Organized Tourists	100.0	63.3	36.7	2.4	24.1	25.9	22.3	16.9	8.
3. Business Visitors	100.0	76.4	23.6	3.3	23.3	31.9	25,7	12.5	3.
4. VFR (Visit friends & relatives)	100.0	61.9	38.1	3.4	24.4	32.9	23.3	10.5	5.
		,		<u>-</u>	L <u></u> 4	l	, J.	<i>-</i>	
5. North America	100.0	61.0	39.0	4.2	29.4	21.8	20.0	16.2	
6. Neighboring Countries	100.0	71.4	28.6	3.2	27.3	35.8	24.0	7.8	1.
7. Other Americas	100.0	76.2	23.8	2.4	23.4	32.3	25.0	12.9	4.
8. Europe	100.0	60.2	39.8	2.7	37.3	30.6	14.9	9.7	4.
9. Others	100.0	53.8	46.2	1.0	31.7	31.7	20.2	8.7	6.
				· · · · ·	с <u> </u>	· ·			
10. Single male visitors	100.0	100.0	0.0	8.2	56.3	25.3	6.3	3.9	0.
11. Single femate visitors	100.0	0.0	100.0	9.4	59.4	23.4	5.1	2.7	0.
12. Married male visitors	100.0	100.0	0.0	0.2	11.8	36.4	35.8	15.7	0
13. Married female visitors	100.0	0.0	100.0	0.8	21.6	38.5	23.9	15.2	0.
14. Third age male visitors	100.0	100.0	0.0	0.0	0.0	0.0	0.0	0.0	100.
15. Third age female visitors	100.0	0.0	100.0		0.0			0.0	100.
To: Maid age female visitors	100.0	0.0	100.0	0.0	0.0	0.0	0.0	0.0	100.
`````````````````````````````````	······	0.0	100.0	0.0	0.0	0.0	0.01	0.0	100
Tourist Average	100.0	64.8	35.2	2.9	33.0	31.3	19.3	9.4	4.
Tourist Average	100.0	64.8	35.2	2.9	33.0	31.3	19.3	9.4	4.
Tourist Average 16. Archaeology oriented tourists	100.0	64.8 69.4	<b>35.2</b> 30.6	2.9	<b>33.0</b> 32.0	<b>31.3</b> 30.9	<b>19.3</b> 20.1	9.4	4
Tourist Average 16. Archaeology oriented tourists 17. Colonial oriented tourists	100.0 100.0 100.0	64.8 69.4 64.6	<b>35.2</b> 30.6 35.4	2.9 1.4 3.3	<b>33.0</b> 32.0 33.8	<b>31.3</b> 30.9 31.3	19.3 20.1 20.8	9.4 11.0 6.7	4
Tourist Average 16. Archaeology oriented tourists 17. Colonial oriented tourists 18. Living indigenous culture oriented tourists	100.0 100.0 100.0 . 100.0	64.8 69.4 64.6 52.6	<b>35.2</b> 30.6 35.4 47.4	2.9 1.4 3.3 2.6	33.0 32.0 33.8 40.6	<b>31.3</b> 30.9 31.3 28.1	19.3 20.1 20.8 15.6	9.4 11.0 6.7 9.4	4
Tourist Average 16. Archaeology oriented tourists 17. Colonial oriented tourists 18. Living indigenous culture oriented tourists 19. Nature oriented tourists	100.0 100.0 100.0 100.0 100.0	64.8 69.4 64.6 52.6 62.8	35.2 30.6 35.4 47.4 37.2	2.9 1.4 3.3 2.6 2.4	33.0 32.0 33.8 40.6 34.8	<b>31.3</b> 30.9 31.3 28.1 32.9	19.3 20.1 20.8 15.6 20.3	9.4 11.0 6.7 9.4 7.2	4
Tourist Average 16. Archaeology oriented tourists 17. Colonial oriented tourists 18. Living indigenous culture oriented tourists 19. Nature oriented tourists 20. Resort oriented tourists (beach & Spa)	100.0 100.0 100.0 100.0 100.0 100.0	64.8 69.4 64.6 52.6 62.8 72.3	35.2 30.6 35.4 47.4 37.2 27.7	2.9 1.4 3.3 2.6 2.4 3.6	33.0 32.0 33.8 40.6 34.8 33.7	31.3 30.9 31.3 28.1 32.9 34.9	19.3 20.1 20.8 15.6 20.3 21.7	9.4 11.0 6.7 9.4 7.2 6.0	4. 4. 3. 2. 0.
Tourist Average 16. Archaeology oriented tourists 17. Colonial oriented tourists 18. Living indigenous culture oriented tourists 19. Nature oriented tourists	100.0 100.0 100.0 100.0 100.0	64.8 69.4 64.6 52.6 62.8	35.2 30.6 35.4 47.4 37.2	2.9 1.4 3.3 2.6 2.4	33.0 32.0 33.8 40.6 34.8	<b>31.3</b> 30.9 31.3 28.1 32.9	19.3 20.1 20.8 15.6 20.3	9.4 11.0 6.7 9.4 7.2	4 4 4 3 2 0
Tourist Average 16. Archaeology oriented tourists 17. Colonial oriented tourists 18. Living indigenous culture oriented tourists 19. Nature oriented tourists 20. Resort oriented tourists (beach & Spa) 21. Others	100.0 100.0 100.0 100.0 100.0 100.0	64.8 69.4 64.6 52.6 62.8 72.3	35.2 30.6 35.4 47.4 37.2 27.7	2.9 1.4 3.3 2.6 2.4 3.6 4.7	33.0 32.0 33.8 40.6 34.8 33.7 20.7	31.3 30.9 31.3 28.1 32.9 34.9 35.3	19.3 20.1 20.8 15.6 20.3 21.7 20.7	9.4 11.0 6.7 9.4 7.2 6.0 14.7	4. 4. 3. 2. 0. 4.
Tourist Average 16. Archaeology oriented tourists 17. Colonial oriented tourists 18. Living indigenous culture oriented tourists 19. Nature oriented tourists 20. Resort oriented tourists (beach & Spa) 21. Others 22. North American tourists	100.0 100.0 100.0 100.0 100.0 100.0 100.0	64.8 69.4 64.6 52.6 62.8 72.3 65.3 61.6	35.2 30.6 35.4 47.4 37.2 27.7 34.7 38.4	2.9 1.4 3.3 2.6 2.4 3.6 4.7 1.8	33.0 32.0 33.8 40.6 34.8 33.7 20.7 32.7	31.3 30.9 31.3 28.1 32.9 34.9 35.3 21.0	19.3 20.1 20.8 15.6 20.3 21.7 20.7 18.1	9.4 11.0 6.7 9.4 7.2 6.0 14.7 16.0	4 4 3 2 0 4 10
Tourist Average 16. Archaeology oriented tourists 17. Colonial oriented tourists 18. Living indigenous culture oriented tourists 19. Nature oriented tourists 20. Resort oriented tourists (beach & Spa) 21. Others 22. North American tourists 23. Neighboring Countries tourists	100.0 100.0 100.0 100.0 100.0 100.0 100.0 100.0	64.8 69.4 64.6 52.6 62.8 72.3 65.3 61.6 69.6	35.2 30.6 35.4 47.4 37.2 27.7 34.7 38.4 30.4	2.9 1.4 3.3 2.6 2.4 3.6 4.7 1.8 4.0	33.0 32.0 33.8 40.6 34.8 33.7 20.7 32.7 31.1	31.3 30.9 31.3 28.1 32.9 34.9 35.3 21.0 34.5	19.3 20.1 20.8 15.6 20.3 21.7 20.7 18.1 22.2	9.4 11.0 6.7 9.4 7.2 6.0 14.7 16.0 6.5	4 4 3 2 0 4 10
Tourist Average 16. Archaeology oriented tourists 17. Colonial oriented tourists 18. Living indigenous culture oriented tourists 19. Nature oriented tourists 20. Resort oriented tourists (beach & Spa) 21. Others 22. North American tourists 23. Neighboring Countries tourists 24. Other Americas tourists	100.0 100.0 100.0 100.0 100.0 100.0 100.0 100.0 100.0	64.8 69.4 64.6 52.6 62.8 72.3 65.3 61.6 69.6 71.0	35.2 30.6 35.4 47.4 37.2 27.7 34.7 38.4 30.4 29.0	2.9 1.4 3.3 2.6 2.4 3.6 4.7 1.8 4.0 1.0	33.0 32.0 33.8 40.6 34.8 33.7 20.7 32.7 31.1 30.0	31.3 30.9 31.3 28.1 32.9 34.9 35.3 21.0 34.5 32.0	19.3         20.1         20.8         15.6         20.3         21.7         20.7         18.1         22.2         25.0	9.4 11.0 6.7 9.4 7.2 6.0 14.7 16.0 6.5 10.0	4. 4. 4. 3. 2. 0. 4. 4. 10. 1. 1. 2.
Tourist Average         16. Archaeology oriented tourists         17. Colonial oriented tourists         18. Living indigenous culture oriented tourists         19. Nature oriented tourists         20. Resort oriented tourists (beach & Spa)         21. Others         22. North American tourists         23. Neighboring Countries tourists         24. Other Americas tourists         25. Europe tourists	100.0 100.0 100.0 100.0 100.0 100.0 100.0 100.0 100.0 100.0	64.8 69.4 64.6 52.6 62.8 72.3 65.3 61.6 69.6 71.0 54.9	35.2 30.6 35.4 47.4 37.2 27.7 34.7 38.4 30.4 29.0 45.1	2.9 1.4 3.3 2.6 2.4 3.6 4.7 1.8 4.0 1.0 2.0	33.0 32.0 33.8 40.6 34.8 33.7 20.7 32.7 31.1 30.0 38.1	31.3 30.9 31.3 28.1 32.9 34.9 35.3 21.0 34.5 32.0 34.4	19.3         20.1         20.8         15.6         20.3         21.7         20.7         18.1         22.2         25.0         11.9	9.4 11.0 6.7 9.4 7.2 6.0 14.7 16.0 6.5 10.0 9.8	4. 4 4 3 2 0 0 4. 10 10 1 2 3
Tourist Average 16. Archaeology oriented tourists 17. Colonial oriented tourists 18. Living indigenous culture oriented tourists 19. Nature oriented tourists 20. Resort oriented tourists (beach & Spa) 21. Others 22. North American tourists 23. Neighboring Countries tourists 24. Other Americas tourists	100.0 100.0 100.0 100.0 100.0 100.0 100.0 100.0 100.0	64.8 69.4 64.6 52.6 62.8 72.3 65.3 61.6 69.6 71.0	35.2 30.6 35.4 47.4 37.2 27.7 34.7 38.4 30.4 29.0	2.9 1.4 3.3 2.6 2.4 3.6 4.7 1.8 4.0 1.0	33.0 32.0 33.8 40.6 34.8 33.7 20.7 32.7 31.1 30.0	31.3 30.9 31.3 28.1 32.9 34.9 35.3 21.0 34.5 32.0	19.3         20.1         20.8         15.6         20.3         21.7         20.7         18.1         22.2         25.0	9.4 11.0 6.7 9.4 7.2 6.0 14.7 16.0 6.5 10.0	4. 4 4 3 2 0 0 4. 10 10 1 2 3
Tourist Average         16. Archaeology oriented tourists         17. Colonial oriented tourists         18. Living indigenous culture oriented tourists         19. Nature oriented tourists         20. Resort oriented tourists (beach & Spa)         21. Others         22. North American tourists         23. Neighboring Countries tourists         24. Other Americas tourists         25. Europe tourists	100.0 100.0 100.0 100.0 100.0 100.0 100.0 100.0 100.0 100.0	64.8 69.4 64.6 52.6 62.8 72.3 65.3 61.6 69.6 71.0 54.9 50.0	35.2 30.6 35.4 47.4 37.2 27.7 34.7 38.4 30.4 29.0 45.1 50.0	2.9 1.4 3.3 2.6 2.4 3.6 4.7 1.8 4.0 1.0 2.0 0.0	33.0 32.0 33.8 40.6 34.8 33.7 20.7 32.7 31.1 30.0 38.1 40.9	31.3 30.9 31.3 28.1 32.9 34.9 35.3 21.0 34.5 32.0 34.4 29.5	19.3         20.1         20.8         15.6         20.3         21.7         20.7         18.1         22.2         25.0         11.9         11.4	9.4 11.0 6.7 9.4 7.2 6.0 14.7 16.0 6.5 10.0 9.8 9.1	4. 4 4 3 2 0 0 4. 10 1 1 2 3 3 9
Tourist Average         16. Archaeology oriented tourists         17. Colonial oriented tourists         18. Living indigenous culture oriented tourists         19. Nature oriented tourists         20. Resort oriented tourists (beach & Spa)         21. Others         22. North American tourists         23. Neighboring Countries tourists         24. Other Americas tourists         25. Europe tourists         26. Others tourists	100.0 100.0 100.0 100.0 100.0 100.0 100.0 100.0 100.0 100.0 100.0	64.8 69.4 64.6 52.6 62.8 72.3 65.3 61.6 69.6 71.0 54.9 50.0 62.0	35.2 30.6 35.4 47.4 37.2 27.7 34.7 38.4 29.0 45.1 50.0 38.0	2.9 1.4 3.3 2.6 2.4 3.6 4.7 1.8 4.0 1.0 2.0 0.0	33.0 32.0 33.8 40.6 34.8 33.7 20.7 32.7 31.1 30.0 38.1 40.9 29.8	31.3 30.9 31.3 28.1 32.9 34.9 35.3 21.0 34.5 32.0 34.4 29.5 21.6	19.3         20.1         20.8         15.6         20.3         21.7         20.7         18.1         22.2         25.0         11.9         11.4         18.4	9.4 11.0 6.7 9.4 7.2 6.0 14.7 16.0 6.5 10.0 9.8 9.1 16.9	4 4 4 3 2 0 0 4 4 10 11 2 3 3 9 9
Tourist Average 16. Archaeology oriented tourists 17. Colonial oriented tourists 18. Living indigenous culture oriented tourists 19. Nature oriented tourists 20. Resort oriented tourists (beach & Spa) 21. Others 22. North American tourists 23. Neighboring Countries tourists 24. Other Americas tourists 25. Europe tourists 26. Others tourists 27. USA tourists	100.0 100.0 100.0 100.0 100.0 100.0 100.0 100.0 100.0 100.0	64.8 69.4 64.6 52.6 62.8 72.3 65.3 61.6 69.6 71.0 54.9 50.0	35.2 30.6 35.4 47.4 37.2 27.7 34.7 38.4 30.4 29.0 45.1 50.0	2.9 1.4 3.3 2.6 2.4 3.6 4.7 1.8 4.0 1.0 2.0 0.0	33.0 32.0 33.8 40.6 34.8 33.7 20.7 32.7 31.1 30.0 38.1 40.9	31.3 30.9 31.3 28.1 32.9 34.9 35.3 21.0 34.5 32.0 34.4 29.5	19.3         20.1         20.8         15.6         20.3         21.7         20.7         18.1         22.2         25.0         11.9         11.4	9.4 11.0 6.7 9.4 7.2 6.0 14.7 16.0 6.5 10.0 9.8 9.1	4. 4 4 3 2 0 0 4. 10 10 1 2 3

Table 1.2 Characteristics of tourism segments for Guatemalan tourism (1)

<del></del>			Geographi	cal region	Mar	ital Status		Education	Repetit	ive Travel			Puroc	se of visit
North	Neighb.	South	Europe	Others					First	Repeat	Indep	Orq.	Business	Visiting
America	Countries	America	Lolopu	Callors	Single	Married	Co+HS"	Uni+Post ²	timer	Visitor	Holiday	Holiday	traveler	F&R
%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
		· · · · ·					4				<b></b>		I	
25.8	52.1	4.7	13.2	4.0	35.9	50.5	35.6	64.3	37.4	62.6	43.3	5.4	31.0	18,5
24.2	50.4	40	10.7										·····	
34.3	50.4 25.3	4.3	16.7	3.9	41.9	44.1	34.7	65.2	47.7	52.3	100.0	0.0	0.0	0.0
23.9	·····	6.0 5.6	29.5	4.8	31.9	56.6	16.3	83.7	66.9	33.1	0.0	100.0	0.0	0.0
26.0	56.5 59.6	3.7	9.3 7.3	4.6 3.4	29.8	57.1 52.7	34.1	65.7	26.6	73.4	0.0	0.0	100.0	0.0
20.0	59.0	3.7	1.3	3.4	32.6	52.7	47.5	52.1	22.8	77.2	0.0	0.0	0.0	100.0
100.0	0.0	0.0	0.0	0.0	40 E	48.0	10.0	00.4	50.0	47.4	40.0	7.0	00 7	
0.0	100.0	0.0	0.0	0.0	40.5	46.0 56.3	13.6	86.4	52.9	47.1	40.8	7.3	28.7	18.6
0.0	34.7	57.7	0.0	7.7	29.3		56.1	43.7	20.3	79.7	42.9	2.6	32.4	21.7
0.0	0.0	0.0	100.0	0.0	32.7 50.2	56.9 32,1	14.1	85.9	39.1	60.9	35.5	5.6	41.9	14.1
0.0	0.0	0.0	0.0	100.0	46.2	44.2	20.1	79.6 84.6	65.7 55.8	34.3	54.7	12.2	21.9	10.2
	0.0	0.0	0.0	100.0	40.2	44.2	10.4	04.0		44.2	40.4	6.7	37.5	14.4
25.3	47.7	4.8	17.4	4.2	100.0	0.0	38.1	61.8	46.1	53.9	49.8	4.8	27.3	16.6
33.0	38.4	2.9	20.3	5.4	100.0	0.0	33.0	67.0	48.4	51.6	52.7	4.5	24.1	16.3
21.0	60.8	5.9	8.9	3.2	0.0	81.5	34.0	66.0	28.9	71.1	37.0	5.1	39.3	16.9
26.3	53.1	3.5	12.5	4.5	0.0	73.3	42.0	58.0	37.9	62.1	45.5	6.6	21.6	25.1
47.8	27.8	2.2	16.7	5.6	20.0	65.6	21.1	78.9	35.6	64.4	34.4	7.8	30.0	21.1
57.5	20.0	5.0	10.0	7.5	15.0	52.5	30.0	70.0	57.5	42.5	40.0	17.5	10.0	30.0
	<u> </u>		· · · · · · · · · · · · · · · · · · ·					· · · · · · · · · · · · · · · · · · ·	r	·			r	
20.7	50.2	7.4	18.0	3.2	38.7	47.5	34.5	65.4	47.5	52,5	88.9	11.1	0.0	0.0
22.4	010	10.0	07.5										-	
18.3	34.8 63.3	12.2	27.5	2.8	35.7	49.3	28.9	70.8	51.6	48.4	85.8	14.2	0.0	0.0
33.9		6.3	8.8	3.3	36.3	52.9	32.1	67.9	41.3	58.8	93.8	6.3	0.0	0.0
12.6	26.6 64.3	4.2 5.3	32.3	3.1	46.4	38.0	19.3	80.7	58.9	41.1	90.6	9.4	0.0	0.0
3.6	91.6		13.0	4.3	41.1	41.5	45.4	54.6	41.5	58.5	93.2	6.8	0.0	0.0
22.7	60.7	3.6 6.0	8.0	0.0 2.0	36.1 32.0	51.8 55.3	62.7 40.7	37.3	31.3	68.7	96.4	3.6	0.0	0.0
		0.0	0.0	2.0	52.0		40.7	59.3	40.0	60.0	92.0	8.0	0.0	0.0
100.0	0.0	0.0	0.0	0.0	43.1	43.1	12.1	87.9	63.0	37.0	83.3	16.7	0.0	0.0
0.0	100.0	0.0	0.0	0.0	30.1	57.1	53.3	46.5	28.9	71.1	94.3	5.7	0.0	0.0
0.0	0.0	100.0	0.0	0.0	39.0	50.0	12.0	88.0	52.0	48.0	86.0	14.0	0.0	0.0
0.0	0.0	0.0	100.0	0.0	54.1	28.7	18.9	81.1	75.8	24.2	82.4	17.6	0.0	0.0
0.0	0.0	0.0	0.0	100.0	56.8	27.3	20.5	79.5	70.5	29.5	84.1	15.9	0.0	0.0
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100.0	0.0	0.0	0.0	0.0	42.4	44.7	12.9	87.1	62.0	38.0	82.7	17.3	0.0	0.0
100.0	0.0	0.0	0.0	0.0	36.4	50.0	26.4	73.6	36.4	63.6	0.0	0.0	0.0	100.0
0.0	100.0	0.0	0.0	0.0	31.4	57.0	55.5	44.5	29.0	71.0	95.1	4.9	0.0	0.0
0.0	100.0	0.0	0.0	0.0	28.9	53.5	68.4	31.6	13.6	86.4	0.0	0.0	0.0	100.0

Table 1.3 Characteris	tics of	tourism	segme	ents for	Guate	malan	tourism				·
	· · · ·		· · · · · · · · · · · · · · · · · · ·	·	······				ence to coi	ne to Gu	atemala
	Travel	Brochure	AD. of	AD. of	MG/NS	TV/Movie	Experi. of	Friend &	Guate.	Internet	Others
	agent			MG/NS ²			former V.		tour office		
	%	%	%	%	- %	%	%	%	%	%	%
·	·	,		 							· · ·
Whole Visitor Average	4.9	5,9	1.8	1.7	3.3	1.1	19.8	32.9	0,7	3.7	9.2
· · · · · · · · · · · · · · · · · · ·		· · · · · · · · · · · · · · · · · · ·				·					
1. Independent Tourists	5.5	9.9	3.3	3.0	5.9	2.0	31.4	50.1	1.0	6.3	4.5
2. Organized Tourists	33.7	19.3	4.2	3.6	5.4	4.2	18.1	28.9	1.8	6.6	6.6
3. Business Travelers	1.2	1.1	0.4	0.6	0.8	0.1	10.0	8.9	0,5	1.5	19.7
4. VFR (Visit friends & relatives)	1.4	1.1	0.0	0.2	0.7	0.0	9.3	33.8	0.2	0.2	0.9
										1	
5. North America	5.5	3.8	0.6	1.3	2.3	1.0	15.7	32.6	0.4	6.5	13.0
6. Neighboring Countries	3.5	6.4	2.5	1.9	2.7	0.6	24.0	31.2	0.7	2.0	4.1
7. Other Americas	3.6	6.0	0.8	2.0	3.2	2.4	19.8	26.2	1.2	2.4	22.2
8. Europe	9.5	7.7	1.0	1.7	7.2	2.5	14.9	44.5	0.7	5.5	10.7
	7.7	2.9	3.8	1.9	4.8	1.0	8.7	30.8	1.9	2.9	17.3
				l	· · ·	<u>.                                    </u>			L <u></u>	<u>.</u>	
10. Single male visitors	4.7	7.3	2.3	1.8	4.5	1.0	17.1	33.4	1.1	4.5	7.9
11. Single female visitors	3.8	5.8	2.9	1.3	4.5	2.7	17.4	40.4	0.7	5.4	8.7
12. Married male visitors	5.2	5.9	1.1	1.9	3.0	1.1	22.1	28.3	0.6	2.8	10.8
13. Married female visitors	4.9	4.5	2.1	1.8	1.8	0.4	20.0	35.8	0.8	3.5	6.6
14. Third age male visitors	5.6	4.4	1.1	0.0	1.1	0.0	14.4	41.1	0.0	3.3	12.2
15. Third age female visitors	10.0	7.5	2.5	2.5	7.5	0.0	20.0	35.0	0.0	7.5	10.0
							20.0		0.0		10.0
Tourist Average	9.4	11.8	3.7	3.3	6.2	2.3	32.3	50.4	1.1	6.2	4.6
			l	·1			0210				
16. Archaeology oriented tourists	9.6	11.6	2,8	2.3	4.2	2.3	38.0	49.0	1.4	9.9	6.8
17. Colonial oriented tourists	7.5	9.2	2.1	3.3	6.7	1.7	36.3	49.6	0.4	3.8	2.5
18. Living indigenous culture oriented tourists	4.7	11.5	2.1	2.6	5.7	1.6	27.1	66.1	1.6	7.8	6.8
19. Nature oriented tourists	6.3	13.5	2.9	1.4	3.4	1.0	34.8	59.4	1.4	7.7	
20. Résort oriented tourists (beach & Spa)	1.2	6.0	2.4	1.2	2.4	3.6	47.0	60.2	· · · ·	6.0	3.4
21. Others	4,7	4.0	2.0	2.7	1.3	0.0	35.3	59.3	1.2		1.2
						0.0	- 50.5	09.5	1.3	2.0	7.3
22. North American tourists	13.2	8.2	1.4	2.8						44.7	
					5.0	2.5	25.6	53.7	1.1	11.7	9.6
23. Neighboring Countries tourists	6.6	12,9	5.3	3.7	4.8	1.3	40.4	48.2	0.9	3.7	1.9
24. Other Americas tourists	7.0	13.0	1.0	5.0	7.0	6.0	32.0	41.0	2.0	5.0	6.0
25. Europe tourists	13.5	11.5	1.2	2.0	9.8	9.7	20.1	57.4	0.8	7.4	5.3
26. Others tourists	13.6	6.8	6.8	4.5	11.4	0.0	18.2	45.5	4.5	4.5	6.8
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27. USA tourists	14.1	7.5	1.6	2.4	4.7	2.4	26.7	53.3	0.8	12.2	9.8
28. USA- Guaternalan VFR visitors	2.1	1.4	0.0	0.0	0.7	0.0	10.7	35.7	0.0	0.0	1.4
29. Salvadorian tourists	5.1	14.6	6.1	3.6	4.7	1.3	42.6	49.4	0.6	3.8	1.5
30. Salvadorian VFR visitors	0.0	0.9	0.0	0.0	0.0	0.0	10.5	32.9	0.4	0.0	0.4
Note: ¹⁾ Advertisement of T Source: IICA Study Terms N	V, * Ma	gazine a	nd news	paper		_					

Table 1.3 Characteristics of tourism segments for Guatemalan tourism (2)

uatema	Reasons to visit G				Guatemala	abroa orreconing				
Othe	More relax	Richer	Shorter	Lower	South	El Salvador	Honduras	Belize	Costa Rica	Mexico
	Atmosphere	T. Attract.	Travel lime	price	America					
	%	%	%	%	%	%	%	%	%	%
18.	6.5	15.4	11.9	10.7	3.3	3.2	3.6	2.8	6.0	8.6
13.	9.9	27.3	19.2	17.1	4.8	3.1	6.6	4.5	8.6	13.3
19.	5.4	30.1	8.4	7.8	7.8	4.2	6.6	6.6	11.4	13.9
23.	2.5	3.4	3.8	6.2	1.1	3.4	1.0	1.2	4.0	3.1
15.	5.3	4.1	9.4	5.0	1.8	2.7	0.4	0.5	1.8	4.6
	· · · · · · · · · · · · · · · · · · ·									0.01
26.	5.2	13.4	3.7	10.8	3.9	2,5	3.8	5.1	8.0	9.3
10.	6.9	11.3	19.8	11.3	0.7	3.2	3.4	1.8	4,1	5.0
29.	6.0	22.2	6.0	8.5	4.0	7.3	4.0	4.0	9.7	10.9
22.	6.5	30.1	3.2	10.9	10.4 5.8	2.2	3.7	2.9	7.5 	18.2 12.5
- 21.	10.6	18.3	3.8	1.7	5.6		3.8	2.8	4.0	12.0
16.	6.1	17.4	9.0	12.1	4.0	1.3	3.2	3.1	6.1	9.8
18.	7.4	15.8	10.0	12.7	5.4	3.3	4.2	3.6	5.6	10,9
18.	6.3	13.4	14.1	. 9.7	2.3	3.6	4.1	2.3	6.5	7.2
16.	6.2	16.9	11.7	11.1	3.1	3,9	2.9	3.3	5.3	8.0
27.	11.1	17.8	8.9	6.7	4.4	2.2	1.1	1.1	3.3	11.1
27.	2.5	22.5	7.5	2.5	0.0	5.0	0.0	5.0	7,5	12.5
14.	10.0	30.0	19.5	16.4	5.2	3,5	7.0	5.1	9.3	13.8
12.	6.2	42.2	16.4	22.7	6.2	6.5	9.9	8.2	11.0	20.7
12.	10.8	34.2	27.5	14.2	1.7	2.9	9.6	2.9	13.3	12.9
22.	9.4	37.5	14.6	16.1	11.5	4.7	9.9	6.3	13.0	19.3
13.	16.9	32.9	22.7	14.0	5.3	1.9	4.3	7.2	5.8	11.6
8.	21.7	16.9	41.0	12.0	1.2	0.0	4.8	0.0	4.8	8.4
26.	10.7	14.7	21.3	25.3	6.7	3.3	3.3	4.0	9.3	10.0
23.	7.5		7.8	20.3	7.1	4.3	9.3	11.4	15.3	11.0
9.	11.3	22.9	31.7	16.9	0.7	3.2	6.9	2.9	6.3	8.8
11.	11.0	42.0	11.0	13.0	7.0	8.0	8.0	9.0	13.0	23.0
18.	7.8	45.1	4.1	13.9	13.9	2.5	4.9	1.6	9.4	26.2
15.	13.6	36.4	6.8	9.1	9.1	0.0	4.5	6.8	9.1	20.5
23.	7.1	31.0	7.5	19.2	7.1	3.1	8.2	11.4	15.3	10.2
20.	5.7	6.4	2.1	3.6	2.9	2,9	0.0	0.7	2.1	4.3
7.	12.9	22.0	35.4	15.3	0.4	0.4	7.2	2.5	5.3	8.9
12.	3.5	2.2	17.1	4.8	0.0	0.0	0.4	0.0	0.9	3.1

· [			Po	incipal attrac	tion to come to	Guatemala	Tour	rist activitie
	Arch.	Colonial	Liv. Indi.	Nature	Resort	Others	Visits to	Visits I
-	Sites	cities	Cultures	& W'life	(8'ch/Spa)		Arch sites	Colo. ci
······································	%	%	%	%	%	%	%	9
Whole Visitor Average	15.2	10.8	9.3	8.7	3.7	15.4	40.0	
·		10.0	5.3	0.7	3.7	15.1	40.6	47,
1. Independent Tourists	23.6	17.4	14.1	14.8	6.1	11.1	54.3	
2. Organized Tourists	32.5	9.0	12.0	9.0	1.8	7.8	74.7	59.
3. Business Travelers	6.7	5.0	4.5	1.5	0.8	20.5	22.7	34.
4. VFR (Visit friends & relatives)	4.4	6.0	3.7	6.4	3.7	15.7	28.6	
			·····					
5. North America	17.1	9.7	15.2	5.4	0.8	12,2	51.6	56.
6. Neighboring Countries	9.3	11.9	4.3	10.7	6.3	17.2	25.5	37.
7. Other Americas	22.6	12.9	5.2	6.0	1.6	24.2	44.0	47
8. Europe	28.9	7.5	18.9	8.2	1.7	8,2	69.9	64
9. Others	14.4	12.5	10.6	13.5	0.0	10.6	54.8	55
	F	·····················	·····		······		·	
10. Single male visitors	15.3	9.8	8.1	9.5	4.5	13.7	46.1	50
11. Single female visitors	14.1	10.3	16.5	10.5	2.5	10.9	46.9	54
12. Married mate visitors	14.8	11.4	6.4	7,6	3.9	18.1	34.3	41
13. Married female visitors	14.2	10.5	10,7	9.9	4.1	13.0	42.4	50
14. Third age male visitors 15. Third age female visitors	27.8	11.1	13.3	4.4	0.0	14.4	45.6	54
	15.0	15.0	15.0	7.5	0.0	12.5	55.0	65
Tourist Average	26.0	17.7	14.0	15.0			1	
	20.0	17,7	14.2	15.3	6.1	11.1	55.5	59
16. Archaeology oriented tourists	100.0	0.0	0.0	0.0	0.0	0.0	97.6	
17. Colonial oriented tourists	0.0	100.0	0.0	0.0	0.0	0.0	87.5 36.3	55
8. Living indigenous culture oriented tourists	0.0	0.0	100.0	0.0	0.0	0.0		
19. Nature oriented tourists	0.0	0.0	0.0	100.0	0.0	<b>.</b>	64.1	70
20. Resort oriented tourists (beach & Spa)	0.0	0.0	0.0	0.0	100.0	0.0	43.0	<u>49</u> 33
21. Others	0.0	0.0	0.0	0.0	0.0	100.0	37.3	
22. North American tourists	28.1	15.7	23.1	9.3	1.1	12.1	70.1	66
23. Neighboring Countries tourists	18.1	22.3	7.5	19.5	11.2	13.4	37.9	50
24. Other Americas tourists	43.0	15.0	8.0	11.0	3.0	9.0	68.0	62
25. Europe tourists	39.8	8.6	25.4	11.1	0.0	4.9	82.0	72
26. Others tourists	22.7	18.2	13.6	20.5	0.0	6.8	65.9	68
	·							
27. USA tourists	28.6	15.7	21.6	9.8	0.8	12.5	68.6	65
28. USA- Guatemalan VFR visitors	8.6	7.1	9.3	7.1	1.4	7.1	42.9	55
29. Salvadorian tourists	16.9	23.1	5.9	20.6	13.3	12.9	37.1	53
30. Salvadorian VFR visitors Source: JICA Study Tea	3.1	4.4	0.4	8.3	4.4	19.3	13.6	25

Table 1.4	Characteristics	of tourism s	eqments f	or Guatemalan	tourism(3)

ə/Packag	Use	ated in)	ivities (particip	Tourist act	·	<u> </u>					
Use	Not	Olhers	Tourist	Enjoyment	Sports	Shopping	Visits to	Spa	Visits to	Visits to	Visits to
Pack	Used		facilities	Local food		1	museums		Resorts A	Nat. areas	Indi. culture
%	%	%	%	%	%	%	%	%	%	%	
11.3	88.7	10.0	50.5	10.0	22.7	41.2	21.9	9.2	17.6	37.2	42.0
										·····	
4.3	95.7	3.0	52.0	11.5	18.6	42.9	26.4	10.9	24.3	49.3	51.1
100.0	0.0	3.6	42.8	11.4	16.9	59.0	36.7	11.4	12.7	50.0	49.4
7.8	92.2	20.8	49.6	8.4	27.1	38.3	14.6	7.4	8.3	21.5	33.2
7.1	92.9	7.8	51.2	8.7	27.0	36.5	19.6	7.3	19.9	31.7	32.4
15.7	84.3	16.1	57.7	16.8	21.3	57.3	29.4	7.3	15.3	44.5	59.4
5.9	94.1	6.8	47.9	4.5	26.0	27.8	16.5	10.8	18.8	28,9	27.2
16.5	83.5	10.1	48.0	14.1	20.6	47.6	18.1	10.5	12.9	30.6	35.5
18.2	81.8	10.4	50.2	14.9	15.7	55.5	28.1	7.0	19.9	54.5	65.4
16.2	83.7	9,6	42.3	8.7	19.2	44.2	26.0	5.8	17.3	49.0	49.0
	I	!	I	I		<u></u>		····	I		<b>.</b>
9.8	90.2	6.9	50.6	12.1	22.1	38.7	23.4	8.9	17.9	41.0	43.2
10.5	89.5	11.4	59.6	17.2	27.9	56.0	28.6	10.5	26.6	47.8	58.3
11.1	88.9	12.2	46.3	7.4	21.6	34.8	16.0	8,9	14.5	31.0	33.4
12.8	87.2	6.2	54.1	8.8	24.1	45.3	27.2	10.3	19.1	37.4	45.5
10.0	90.0	14.4	46.7	10.0	14.4	48.9	24.4	3.3	10.0	38.9	48.9
25.0	75.0	10.0	50.0	0.0	10.0	60.0	45.0	5.0	12.5	60.0	62.5
14.0	85.2	2.5	48.5	9.2	17.4	42.6	25.3	11.5	22.6	47.9	47.9
14.8	05.2	2.5	40.5	5.2	10.4	42.0	20.0				
19.8	80.2	1.4	47.9	7.4	10.8	42.8	29.2	7.6	17.0	46.7	49.6
10.8	89.2	0.4	43.3	6.7	17.5	43.3	27.1	9.6	12.9	24.2	43.8
10.9	89.1	2.6	59.4	15.6	20.8	67.7	28.1	9.9	22.9	63.5	79.7
9.7	90.3	1.9	52.2	8.7	15.9	32.9	18.4	13.5	29.0	73.4	41.5
4.8	95.2	2.4	42.2	4.8	10.8	13.3	19.3	25.3	65.1	47.0	22.9
10.7	89.3	8.7	46.7	15.3	31.3	40,7	25.3	10.0	19.3	32.0	36.0
21.7	78.3	5.3	53.0	16.7	20.3	61.2	33.8	7.5	13.9	50.5	62.3
8.1	91.9	1.6	44.8	3.5	17.8	26.6	18.8	15.6	29.7	42.3	33.3
22.0	78.0	0.0	51.0	12.0	15.0	56.0	26.0	10.0	14.0	44.0	43.0
22.5	77.5	3.3	53.7	16.0	16.4	61.9	32.8	7.4	17.6	60.7	73.4
18.2	81.8	0.0	47.7	6.8	6.8	38.6	29.5	2.3	11.4	50.0	54.5
					····	······	···· · · · · · · · · · · · · · · · · ·	· ······	·	· ·	···
22.0	78.0	5.1	52.5	16.1	20.0	60.4	32.9	7.1	12.9	51.0	61.2
11.4	88.6	9.3	60.7	15.0	23.6	52.1	27.1	12.1	24.3	54.3	59.3
5.7	94.3	1.5	47.9	3.4	15.0	23,9	17.4	16.5	35.0	44.9	32.6
3.5	96.5	8.8	50.9	5.7	25.0	25.4	17.5	3.9	18.0	17.5	14.9

Table 1.5 Chara	cteristics of	of tourism	segments (	for Guaten	nalan touri	sm (4)		
				·····	[:]		Trave	l companion
	Atone	Spouse	Family	Friends	Family &	Family	Business	Others
			spouse/ son		relatives	<u>&amp; Friends</u>	associates	
	%	%	%	%	%	%	%	%
Whole Visitor Average	35.4	15.8	11.3	23.3	5.3	4.5	4.4	1.6
1. Independent Tourists	25.1	18,1	14.5	30.8	5.6	5.5	0.7	1.2
2. Organized Tourists	21.7	30.1	13.3	30.7	2.4	3.0	0.6	3.0
3. Business Travelers	50.5	8.9	3.7	17.5	3.5	3.0	12.2	2.0
4. VFR (Visit Iriends & relatives)	39.3	17.4	16.5	12.6	8.7	5.5	0.5	0.9
								· · · ·
5. North America	34.4	14.9	8.3	29.4	3.9	3.8	5.4	2.4
6. Neighboring Countries	34.3	16.7	14.7	19.9	6.4	5.6	2.6	0.5
7. Other Americas	46.4	14.5	8.5	18.5	3.6	0.8	6.5	3.2
8. Еигоре	35.6	15.4	5.2	26.6	5.0	4.7	6.5	3.7
9. Others	35.6	13.5	13.5	24.0	2.9	1.9	9.6	1.0
· · · · · · · · · · · · · · · · · · ·								
10. Single male visitors	45.0	2.4	2.7	34.8	5.3	4.2	4.4	2.3
11. Single female visitors	37.9	2.5	4.2	38.2	7.1	4.9	1.8	4.0
12. Married male visitors	36.7	20.0	14.3	15.3	4.4	4.1	6.3	0.6
13. Married female visitors	19.3	29.2	20.4	17.5	6.2	6.2	1.9	0.8
14. Third age male visitors	34.4	28.9	13.3	17.8	3.3	1.1	4.4	4.4
15. Third age female visitors	22.5	27.5	2.5		5.0	5.0	2.5	5.0
						,		
Tourist Average	22.6	20.6	15.2	30.9	5.5	5.5	0.7	1.0
			· · · · ·		·		···	
16. Archaeology oriented tourists	21.8	26.6	13.6	29.2	3.1	5.4	0.6	2.3
17. Colonial oriented tourists	21.7	24.2	19.2	22.5	8.3	4.6	0.4	0.0
18. Living indigenous culture oriented tourists	24.5	18.2	9.4	40.1	4.2	2.6	1.0	1.0
19. Nature oriented tourists	24.2	12.6	17.9	33.3	3.9	7.7	1.0	0.0
20. Resort oriented tourists (beach & Spa)	8.4	16.9	22.9	37.3	8.4	7.2	1.2	0.0
21. Others	20.0	19.3	17.3	30.0	8.7	7.3	0.7	1.3
				÷ .	· · · · ·		·	. ·
22. North American tourists	29.5	22.1	10.0	35.2	3.6	3.9	0.0	0.0
23. Neighboring Countries tourists	15.3	20.3	21.3	28.8	7.5	6.8	0.7	0.3
24. Other Americas tourists	38.0	20.0	11.0	26.0	3.0	1.0	1.0	1.0
25. Europe tourists	28.3	21.3	5.3	33.6	3.3	5.7	1.6	4.1
26. Others tourists	29.5	18.2	15.9	31.8	2.3	2.3	0.0	2.3
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27. USA tourists	29.0	22.4	9.8	35.7	3.9	3.1	0.0	0.0
28. USA- Guatemalan VFR visitors	33.6	19.3	17.9	14.3	10.7	5.7	0.0	0.7
29. Salvadorian tourists	12.9	19.1	22.0	31.4	7.6	7.4	0.4	0.2
30. Salvadorian VFR visitors Source: JICA Study Te	43.4	18.4	14.9	11.8	7.0	4.8	0.9	0.0

 Table 1.5
 Characteristics of tourism segments for Guatemalan tourism (4)

ents visited	Departme	·						gth of stay	Len		gth of stay	Len	·····
Alta	Quiche	Quetzal	Izabal	Potén	Sototá	Sacatepe	Guatemala	ia (nights)	Guatema	· · · · · · · · · · · · · · · · · · ·	ry (nights)	hole itinera	W
Verapaz		tenango				quez		Mode	Median	Mean	Mode	Median	Mean
%	%	%	%	%	%	%	%	#	#	##	#	#	#
6.5	8,6	10.2	10.8	21.9	22.4	36.5	57.4	2.0	6.0	12.8	3.0	8.0	18.7
							47.0		7.0	13.3	3.0	10.0	21.0
10.2	13.6	15.5	16.8 13.9	32.2 48.8	33.3	52.9	47.6	2.0	8.0	13.0	10.0	10.0	22.5
4.8	14.5	9.0			40.4	55.4	56.6	2.0	4.0	13.2	2.0	5.0	17.2
3.3	3.2	5.5 6.6	3.8	7.7	8.2	16.9	70.4 59.3	2.0	5.0	11.0	3.0	6.0	14.0
9.7	3.4	0.0	0.2		14.0	20.0		2.0					
5,1	8.0	11.2	10.8	29.4	29.8	50.1	51.7	8.0	8.0	17.4	10.0	11.0	26.2
6.8	5.4	8.9	7.7	9.7	12.5	22.5	58.3	2.0	3.0	6.6	3.0	4.0	8.0
3.6	6.9	6.0	10.9	25.4	24.6	31.5	67.7	6.0	6.0	11.0	15.0	10.0	17.2
9,5	23.1	15.7	22.1	47.8	43.0	61.2	58.7	5.0	14.0	25,9	30.0	21.0	42.0
8,7	7.7	10.6	9.6	33.7	24.0	51.0	60.6	8.0	9.0	22.1	15.0	15.0	33.8
	l.	t	<b>_</b>			L		<b>.</b>	<b>L</b>		······		
6.8	8.2	11.6	12.9	24.0	23.5	41.3	56.9	2.0	7.0	16.4	2.0	9.0	25.0
9.4	13.6	15.4	15.4	28.3	32.4	48.4	49.8	3.0	8.5	19.3	2.0	13.0	30.7
5.3	5.7	7.2	8.0	17.3	17.2	27.1	62.3	2.0	4.0	9.0	3.0	6.0	12.4
6.8	12.3	11.7	11.3	25.7	24.7	44.0	52.5	2.0	6.0	11.4	3.0	8.0	16.5
6.7	5.6	8.9	11.1	14.4	23.3	32.2	63.3	1.0	8.0	19.6	2.0	10.0	22.5
5.0	12.5	10.0	10.0	40.0	35.0	50.0	40.0	8.0	10.0	12.9	2.0	13.0	19.2
												 	·
10.0	14.3	13.7	17.0	33.4	34.1	51.0	49.9	2.0	6.0	10,8	3.0	9.0	18.5
			·······	:		r							
8.2	17.0	12.5	19.5	60.6	34.3	52.4	52.7	5.0	7.0	10.5	10.0	12.0	20.8
4.6	5.8	. 8.3	4.6	15.0	25.4	57.5	47.1	2.0	4.0	7.7	3.0	6.0	11.7
9.9	24.0	19.3	27.1	41.7	49.5	66.1	49.5	2.0	11.0	18.5	30.0	18.5	32.3
17.9	15.9	16.4	22.7	27.1	38.6	41.1	49.8	2.0	5.0	9.7	3.0	7.0	15.3
10.8	10.8	14.5	16.9	3.6	26.5	39.8	41.0	2.0	4.0	8.0	3.0	5.0	10.4
9.3	8.0	11.3	10.7	18.7	21.3	38.7	56.0	2.0	5.0	10.3	3.0	7.0	16.2
5.3	10.0	10.7	15.3	49.1	39.5	61.2	42.7	10.0	8.0	14.0	10.0	14.0	27.1
·····								2.0	4.0	7.0	3.0	5.0	8.5
12.3	10.4	14.7	13.2	14.0	23.1	36.4	50.7	6.0	8.0	10.9	15.0	15.0	18.8
6.0	12.0	8.0	19.0	49.0	41.0	55.0	50.0	7.0	12.0	17.5	30.0	21.0	36.6
9.8		18.0	29.9	62.3	54.5	75.0	55.7	8.0	8.0	13.1	30.0	16.0	24.0
15.9	18.2	9.1	9.1	43.2	45.5	70.5	54.5					1	
5.5	8.2	9.0	15.3	46.3	36.9	59.6	45.1	3.0	8.0	13.5	10.0	12.0	24.3
5.0	2.9	10.0	12.9	16.4	27.1	43.6		7.0	9.0	13.3	10.0	11.0	17.2
15.0	13.1	14.0	14.0	8.5	24.1	38.3	52.5	2.0	3.0	7.4	3.0	5.0	8.5
2.2	35.1	2.6	3.9	4.8	4.8	12.3	64.9	2.0	3.0	6.1	3.0	4.0	7.6

Table 1.6 Charac	teristics	s of touris	m segn	ients for	Guatema	alan tou	ism (5)			
					Ac	commoda	tion Used	Co	ombined de	estination
	Hotel	Aparthoel	F&R	Own	Camping	Home	Others	Only	Mundo	Others
	Lodge	(Suite)	Home	Home		Stay		Guate.	Maya	Í
	%	%	%	%	%	%	%	%	%	%
Whole Visitor Average	77.9	4.4	21.9	1.5	2.3	5,2	2.1	65.2	37.3	17.2
							· · ·		t	J
1. Independent Tourists	86.4	4.8	13.9	0,9	3.6	6.9	1.0	59.9	51.2	16.2
2. Organized Tourists	88.0	12.0	6.6	0.6	2.4	7.2	1.2	44.6	61.4	18.1
3. Business Travelers	80.6	3.6	12.9	2.1	1.5	4.2	3.5	68.8	25.5	22.0
4. VFR (Visit friends & relatives)	51.4	2.7	59.8	2.5	0.5	2.0	1.2	77.6	19.8	10.1
						······································		1	<u></u> I	B
5. North America	78.6	4.6	24.7	2.2	4.6	12,1	4.1	49.0	49.9	28.5
6. Neighboring Countries	75.3	3.2	22.9	1.0	1.2	1.3	0.8	87.9	12.7	4.4
7. Other Americas	82.7	8.1	17.3	1.2	2.4	3.2	2.4	51.2	50.0	25.0
8. Europe	84.1	6.2	16.7	2.2	2.0	7.2	2.7	30.3	89.1	28.4
9. Others	76.0	5.8	16,3	2.9	1.9	4.8	1.9	25.0	67.3	54.8
				· ; · · ·	·			·	l	
10. Single male visitors	78.7	3.5	23,7	0.6	2.9	7.1	1.9	58.2	45.6	22.1
11. Single female visitors	75.9	3.6	22.8	1.6	2.5	11.8	2.9	56.3	55.4	23.2
12. Married mate visitors	78.8	5.6	19,5	1.6	2.1	2.0	- 1.7	71.0	28.9	13.3
13. Married female visitors	78.4	3.7	23.0	1.8	2.1	5.8	2.3	68.7	32.5	13.0
14. Third age male visitors	66.7	3.3	31,1	4.4	2.2	2.2	2.2	54.4	42.2	27.8
15. Third age female visitors	77.5	2.5	30.0	5.0	0.0	2.5	2.5	57.5	37.5	27.5
		·		<b>1</b>		<b>/</b>	ł	ł	1	
Tourist Average	87.3	5.5	12,4	0.8	3.3	2.6	0.7	58.6	52.0	15.6
			·····	I	· ·			1	I	
16. Archaeology oriented tourists	91.5	4.5	8.5	1.1	3.7	1.4	0.8	45.0	71.1	17.3
17. Colonial oriented tourists	87.5	4.6	13.8	0.4	0.4	2.1	0.8	70.4	33.8	10.8
18. Living indigenous culture oriented tourists	84.4	4.7	18.2	2.1	6.8	6.8	1.6	40.1	83,3	24.0
19. Nature oriented tourists	86.0	4.3	13.0	0.5	2.9	1.4	0.5	68.1	36.2	14.5
20. Resort oriented tourists (beach & Spa)	90.4	2.4	12.0	0.0	1.2	0.0	0.0	91.6	7.2	6.0
21. Others	83.3	6.0	14.0	0.0	5.3	4.0	0.7	69.3	38.0	16.7
· · · · · · · · · · · · · · · · · · ·								<b>I</b>	i	J
22. North American tourists	86.5	5.0	12.8	1.8	7.1	5.7	0.4	36.7	53.4	22.1
23. Neighboring Countries tourists	86.6	4.0	12.6	0.1	2.2	1.0	0.1	86.8		
24. Other Americas tourists	88.0	11.0	14.0	0.0	4.0	1.0	2.0	39.0		2.1 23.0
25. Europe tourists	90.2	7.4	11.1	1.6	2.0	4.5	2.0	1	50.0	
26. Others tourists	86.4	9.1	6.8	2.3	2.3	0.0	2.3	<u>19.7</u> 15.9	74.6	21.3
	L	1	L	· · ·	L			15.9	65.9	40.9
27. USA tourists	85.9	5.1	12.5	2.0	6.3	5.5	0.4	20.0	75 0	22.0
28. USA- Guaternalan VFR visitors	58.6	3.6	62.1	4.3	1.4		0.4	38.8	75.3	23.9
29. Saivadorian tourists	87.1	1.3	13.4	4.3 0.2		2.9	5.0	57.9	29.3	20.7
30. Salvadorian VFR visitors	32.0	F	70.2	1.3	1.3 0.0	0.8	0.0	92.2	8.0	2.8
Note: "Average ratir					0.0 Dvement". 2	0.9 2 for "som	0.0 e need fo	93.9 r Imorove	6.6 ment". 3 f	2.2 07

 Table 1.6
 Characteristics of tourism segments for Guatemalan tourism (5)

Note: "Average rating of the results: 1 for "no need for Improvement", 2 for "some need for Improvement", 3 for "need improvement" and 4 for "strong need improvement"

uate. Tourism	vices & Facilities in G	ing Adequacy Ser	Rat	/day- p/pax	Total Exp. p			Total Exp. p	
Avl [®] bility o	Avi/bility of ent/mt	Manners of	Security	nala -USD-)	(in Guaten		rary-USD-)	(Total itine	
good guide	& night activ.	street vendors		Mode	Median	Mean	Mode	Median	Average
	#	#	#	#	#	#	#	#	#
1.7	1.84	1.96	2.43	50.0	38.0	100.6	50.0	50.0	126.3
	h								
1.70	1.82	1.90	2.42	50.0	33.0	66.8	17.0	40.0	88.8
1.50	1.84	1.88	2.08	100.0	50.0	102.2	50.0	100.0	163.4
1.8	1.85	2.03	2.44	100.0	58.0	166.9	100.0	81.0	188.1
1.78	1.87	2.03	2.53	50.0	31.0	70.9	50.0	39.5	92.4
			·····						105 5
1.65	1.74	1.92	2.26	50.0	40.0	87.9	100.0	92.0	165.5
1.70	1.80	1.95	2.41	50.0	33.0	94.0	25.0	28.0	84.4
1.9	1.96	2.10	2.48	50.0	78.0	171.1	100,0	125.0	188.3
1.78	2.04	1.95	2.70	100.0	42.0	109.4	50.0	66.0	157.8
1.80	2.07	2.12	2.68	100.0	55.5	106.6	67.0	76.0	224.3
1.7	1.91	1.99	2.45	50.0	33.0	74.5	100.0	42.0	107.3
1.7	1.82	1.95	2.41	13.0	29.0	77.7	100.0	40.0	107.5
1.7	1.82	1.96	2.41	50.0	50.0	126.6	50.0	54.5	148.6
1.74	1.80	1.92	2.45	25.0	35.0	78.8	100.0	50.0	100.5
1.7	1.90	2.25	2.73	100.0	50.0	138.7	50.0	91.0	159.5
1.40	1,68	1.85	1.93	50.0	36.0	56.5	8.0	50.0	134.1
<u>-</u>	<u></u>						17.0	10.0	00.4
1.71	1.84	1.90	2.38	50.0	36.0	72.4	17.0	42.0	98.4
	· · · · · · · · · · · · · · · · · · ·						100 0		105 4
1.6	1.85	1.80	2.27	50.0	50.0	85.7	100.0	58.0	105.4
1.75	1.85	2.00	2.45	25.0	35.0	61.5	13.0	33.0	87.1
1.73	1.80	1.79	2.51	50.0	33.0	59.0	33.0	46.0	93.9
1,78	1.88	1.98	2.48	25.0	34.5	75.0	17.0	31.5	116.2 51.4
1.5	1.78	2.00	2.49	13.0	25.0	60.1	17.0	25.0	88.5
1.7:	1.79	1.94	2.36	25.0	29.5	72.6	25.0	38.0	60.5
1.6	1.77	1.77	2.14	25.0	40.0	75.9	100.0	83.0	157.0
1.7	1.82	1.98	2.42	25.0	28.0	52.5	13.0	24.0	50.7
1.7	1.82	1.94	2.30	50.0	67.0	131.1	100.0	100.0	166.6
1.6	1.97	1.81	2.54	100.0	44.5	106.2	48.0	61.5	114.8
1.6	1.95	2.02	2.60	50.0	52.0	90.2	111.0	69.0	295.5
	r						100.0	00.0	160.0
1.6	1.77	1.77	2.17	25.0	42.5	79.9	100.0	92.0	166.8
1.8	1.86	2.18	2.59	50.0	38.0	94.5	100.0	75.0	144.9
1.70	1.80	1.97	2.41	25.0	25.0	40.1	13.0	18.0	33.0
1.64	1.79	1.92	2.39	25.0	25.0	37.4	13.0	20.0	38.2

.

Table 1.7 Ch	aracterisu	cs of tour	ism segn	ients for G	luatemala	n tourism	(6)	
			Rating Adeo	uacy of Som	e Services a	nd Facilities i	in Guatemala	un Tourism ¹⁾
``````````````````````````````````````	Avl'bility of	Avl'bility of	Chances for	Avi'bility of	Eovm't	Tourism	Reli.&qual.	Taxi serv. &
	food & rest.	good hotels	comty life	shop'g items	protection	information	of Tour Op.	public trans.
	#	#	#	#	#	#	#	Ħ
Whole Visitor Average	1.65	1.65	1.81	1.70	2.49	1.91	1.83	2.14
	- L				·		t	L
1. Independent Tourists	1.66	1.66	1,77	1.66	2.56	1.91	1.82	2.13
2. Organized Tourists	1.65	1.63	1.66	1.58	2.31	1.84	1.71	2.01
3. Business Travelers	1.62	1.60	1.88	1.75	2.42	1.95	1.85	2.14
4. VFR (Visit friends & relatives)	1.68	1.69	1.83	1.73	2.46	1.88	1.85	2.23
5 Moth Amorine	1.55	1.53	1.60	1.50	0.70	1.00	4 70	
5. North America	1.68	<u>}</u>	1.66	1.52	2.76	1.86	1.76	1.86
6. Neighboring Countries	1.67	1.72	1.83	1.79	2.22	1,87	1.81	2.19
7. Other Americas	+·· ·	1.61	1.94	1.79	2.44	1.98	1.83	2.29
8. Europe	1.64	1.57	1.84	1.60	2.98	2.09	1.95	2.27
9. Olhers	1.00	1.90	2.06	1.75	2.63	2.21	2.13	2.55
10. Single male visitors	1.69	1.66	1.75	1.64	2.58	1.88	1.82	2.17
11. Single female visitors	1.60	1.60	1.70	1,56	2.68	1.91	1.82	2.12
12. Married male visitors	1.64	1.67	1.85	1.77	2.39	1.93	1.84	2.14
13. Married female visitors	1.68	1.63	1.84	1.71	2.44	1.93	1.85	2.17
14. Third age mate visitors	1.55	1.60	1.91	1.74	2.58	1.98	1.75	2.11
15. Third age female visitors	1.65	1.66	1.89	1.46	2.31	1.81	1.53	1.72
Tourist Average	1.68	1.67	1.78	1.68	2.47	1,91	1,80	2.13
	•	I.,		I				L
16. Archaeology oriented tourists	1.59	1.60	1.71	1.59	2.42	1.88	1.73	2.10
17. Colonial oriented tourists	1.74	1.68	1.79	1.67	2.44	1.91	1.84	2.07
18. Living indigenous culture oriented tourists	1.62	1.55	1.83	1.44	2.83	2.06	1.84	2.07
19. Nature oriented tourists	1.76	1.77	1.84	1.90	2.43	1.95	1.95	2.31
20. Resort oriented tourists (beach & Spa)	1.73	1.78	1.80	1.87	2.50	1.88	1.75	2.22
21. Others	1.65	1.71	1.76	1.74	2.41	1.86	1.80	2.06
	1 1 6 7	r	T	<u></u>	r	r	· ·	· · · · · · · · · · · · · · · · · · ·
22. North American tourists			1.68	1.51	2.64	1.86	1.71	1.80
23. Neighboring Countries tourists		1.78	1.82	1.81	2.29	1.91	1.84	2.25
24. Other Americas tourists		1.61	1.75	1.61	2.32	1.93	1.74	2.27
25. Europe tourists		1.54	1.77	1.54	2.87	1.98	1.82	2.08
26. Others tourists	1.89	1.86	1.98	1.71	2.53	2.07	1.98	2.40
27. USA tourists	1.58	1.55	1.68	1.52	2.65	1.85	1.72	1.79
28. USA- Guatemalan VFR visitors		1.63	1.79	1.73	2.87	1.95	1.93	2.09
29. Salvadorian tourists	1.73		1.80	1.83	2.32	1.90	1.82	2.29
	1.65		T	r			-	

Characteristics of tourism comments for Quaternalan tourism (6) Table 17

Note: ¹⁾ Average rating of the results: 1 for "no need for Improvement", 2 for "some need for Improvement", 3 for "need improvement" and 4 for "strong need improvement" Source: JICA Study Team, Visitor Survey in March and July 2001

sited again	nents to be vi	Departn						Interest
Alta	Quiche	Quetzal	Izabal	Petén	Sololá	Sacatepe	Guatemala	to Return
Verapaz	.	tenango				quez		to Guate.
%	%	%	%	%	%	%	%	%
4.7	3.0	5.6	7.3	30.9	17.4	28.0	14.0	94.2
6.1	2.8	6.1	8.3	32.7	18.3	27.9	10.0	94.8
5.4	3.0	2.4	7.2	42.2	22.3	27.1	7.2	86.7
3.8	2.8	5.1	5.1	28.6	14.1	27.5	17.5	94.7
3.2	3.6	6.2	8.7	26.7	19.6	29.4	19.6	93.6
5.9	3.6	5.2	6.9	32.6	21.0	36.4	9.8	94.8
3.5	2.3	6,2	7.3	25.6	14.4	22.7	18.9	95.4
			7.7	42.3	21.8	34.3	13.3	94.0
3.6	2.8	5.2 4.7	7.5	40.5	19.7	26.4	5.0	89.6
. 5.8	3,8	3.8	7.7	31.7	14.4	32.7	10.6	89.4
			I		L			I
5.3	2.3	6.8	8.1	32.1	18.4	26.9	11.8	94.5
5.6	2.7	7.8	8.7	27.0	18.1	27.2	9.8	94.0
4.5	2.7	4.2	6.1	31.2	16.3	27.0	16.7	94.2
3.5	4.3	5.3	8.9	32.1	18.1	31.9	13.8	94.9
5.6	4.4	7.8	5.6	32.2	21.1	28.9	12.2	91.1
5.0	5.0	7.5	2.5	30.0	12.5	32.5	10.0	85.0
	0 -1				10.0	07.01	10.01	04.01
5.5	2.7	4.9	8.3	33.2	19.0	27.0	10.3	94.0
6.2	4.2	7.1	7.4	47.3	20.7	30.0	7.9	94.1
5.4	1.3	4.2	9.6	30.8	20.8	45.8	12.5	95.8
5.7	5.7	5.7	8.9	37.0	23.4	18.8	5.2	91.7
5.3	1.0	3.9	8.7	29.5	21.3	15.9	10.6	93.7
3.6	1.2	1.2	8.4	15.7	15.7	22.9	9.6	96.4
4.7	3.3	3.3	6.7	19.3	12.0	26.0	17.3	94.7
8.2	2.5	3.6	5.0	36.3	22.4	33.5	7.1	93.2
3.2	2.5	5.6	9.3	26.0	16.0	23.9	14.0	96.9
7.0	3.0	9.0	11.0	52.0	30.0	30.0	13.0	93.0
7.8	2.5	4.1	7.8	41.8	19.7	26.6	4.1	88.1
6.8	9.1	0.0	6.8	38.6	15.9	29.5	2.3	86.4
			1					r
7.8	2.7	3.1	4.3	36.9	21.6	34.1	6.7	92.9
2.1	7.1	3.6	12.9	30.0	27.9	34.3	12.9	93.6
4.0	1.7	6.1	8.9	20.8	15.3	25.6	14.4	96.8
2.2	1.8	7.9	6.1	19.3	14.5	22.4	22.8	93.4

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1.2. Interviews with the Travel Trade

1.2.1. Objectives of the Survey

Interviews with the travel trade were conducted throughout the study period in Guatemala, USA, Germany and Japan with the following objectives:

- To obtain information of tourism market characteristics that would supplement existing statistics,
- To incorporate the opinions and ideas of the travel trade into the JICA Study, and
- To get feed backs regarding the development directions, project ideas, and policy recommendations for INGUAT.

1.2.2. Results of the Interviews

The following tables show the summary of the interviews.

1. Results of the Surveys

Continues type Photosys P	Specific Freih To Specific The Specific Freih To Specific Freih To Specific Freih Specific Freih Specific Freih To Specific Freih To Specific Freih To Specific Freih Specific Freih Specific Freih Specific Freih To Specific Freih Specific Freih Specific Freih Specific Freih Specific Freih Specific Freih Specific Freih Specific Freih Specific Freih Specific Freih Specific Freih Specific Freih Specific Freih Specific Freih Specific Freih Specific Freih Specific Freih Specific Freih Specific Freih Specific Freih Specific Freih Specific Freih Specific Freih Specific Freih Specific Freih Specific Freih Specific Freih Specific Freih Afree Afree Specific Freih Specific Freih Specific Freih Specific Freih Specific Freih Specific Freih Specific Freih Specific Freih Specific Freih Afree Afree Specific Freih Specific Freih Specific Freih Specifi			. The el orsaless				
Instantial Circle Model / Mail Model / Mail Model / Mail Notes, Felin Conjecture Distribution of the instantial in the instantial of the instantingene of the instantial of the instantial of the instantial of th	Tores, Felde Myder JA Mail Column of the second of the se		and the second	l	· · · · · · · · · · · · · · · · · · ·		loreign/domestic	
Instantial Circle Model / Mail Model / Mail Model / Mail Notes, Felin Conjecture Distribution of the instantial in the instantial of the instantingene of the instantial of the instantial of the instantial of th	Tores, Felde Myder JA Mail Column of the second of the se	-1	Plores, Pelen	Tour Operator,	Travel kineraries in Pelon	3	5 Foreign: 80%; National: 20%	and and an an an and the second s
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Outschenange Tojir Operator Subcontracted by major tour operators by min package tours in the Xeta area. Pelid specification nature and adventure tours. S In Ouetzakenange great is reported a growing market to Mount & Bake stimulated by local and national competitions. There are clubs based in Guidenaue tours. 90 Cobin, Alfa Verapaz Spanish School Spanish School 2 pLis additional wiften needed Foreign 160% 19 Cobin, Alfa Verapaz Informet cate Commentication services 2 pLis additional wiften needed Foreign 160% 20 Cobin, Alfa Verapaz Informet cate Commentication services 4 Foreign 95% Domestic 1% This year discreasing due security processing. 21 Cobin, Alfa Verapaz Hotel Lodge Lodge Lodge Lodge 22 Cobin, Alfa Verapaz Lodge Lodge Lodge Lodge Foreign 40% Domestic 60% NGO s growing. Seminar facilities allow them to receive them. 22 Cobin, Alfa Verapaz Lodge Salvadoring because diag know the area ing Salvadoring Salvadoring because diag know the area ing Salvadoring 20 Cobin, Alfa Transport Transport	Outschenunge Tojir Operator Subcontracted by major tour operators for nn pockage tour operators adventure tours. S In Oueszahenange grea it is reported a growny market for Mount & Bace simulated by local and national competitions. There are dubs based in Guidemala dry. 9 Cobin, Alfa Spanish School Spanish School 2 plus additional when needed Foreign 160% 9 Cobin, Alfa Intermet cale Commenciation services 2 plus additional when needed Foreign 160% 9 Cobin, Alfa Intermet cale Commenciation services 4 Foreign 160% 10 Cobin, Alfa Intermet cale Commenciation services 4 Foreign 160% 11 Cobin, Alfa Intermet cale Commenciation services 4 Foreign 160% 12 Cobin, Alfa Intermet cale Commenciation services 4 Foreign 39% Domestic 1% This year discreasing due security problems. 12 Cobin, Alfa Hotel Lodge Lodge Signification 10 receive them. 12 Cobin, Alfa Transport Foreign 3% Domestic 1% Domestic 60% NGO s growing. Seminar facilities allow them to receive them. 12 Cobin, Alfa	<u>14 년 년 15 12 14 14 14 14 14 14 14 14 14 14 14 14 14 </u>	Cuetzatienango Cuetzatienango	Tour Operator Hotal Tour Operator Tour Operator Spanish School Internet cate Hotel Lodge Transport company Hotel	Lodging Xeta and sumounskings by non package tour operators to non package tours in the Xeta area. Field of specification nature and adventure tours. Spanish school Commenciation services Lodging Kidging Fransport	2 plus additional when needed 33+7 temporary 12	Exterior (2015) Foreign 160% Foreign 99% Domestic 1% Foreign 40% Domestic 60% Foreign 3% Domestic 60% Foreign 3% Domestic 60% Foreign 3% Domestic 85% Stornessic (social) 60% International: 20%	In Ouetzalemange area it is reported a growing market for Mouril & Bake stimulated by local and national competitions. There are obles based in Gustemala city. This year decreasing due security problems. NGO's growing. Seminar facilities allow them to receive them. Decreasing due the insecurity problem.
Outschenange Tojir Operator Subcontracted by major tour operators by min package tours in the Xeta area. Pelid specification nature and adventure tours. S In Ouetzakenange great is reported a growing market to Mount & Bake stimulated by local and national competitions. There are clubs based in Guidenaue tours. 90 Cobin, Alfa Verapaz Spanish School Spanish School 2 pLis additional wiften needed Foreign 160% 19 Cobin, Alfa Verapaz Informet cate Commentication services 2 pLis additional wiften needed Foreign 160% 20 Cobin, Alfa Verapaz Informet cate Commentication services 4 Foreign 95% Domestic 1% This year discreasing due security processing. 21 Cobin, Alfa Verapaz Hotel Lodge Lodge Lodge Lodge 22 Cobin, Alfa Verapaz Lodge Lodge Lodge Lodge Foreign 40% Domestic 60% NGO s growing. Seminar facilities allow them to receive them. 22 Cobin, Alfa Verapaz Lodge Salvadoring because diag know the area ing Salvadoring Salvadoring because diag know the area ing Salvadoring 20 Cobin, Alfa Transport Transport	Duritz/tenange Top Operator Educentracted by major tour operators in in the Xela area. Adventure tours. S In Duceta/lenange great is reported a growing mattet for Mount & Bace stimulated by local and national competitions. There are dubs based in Guidenback down 9 Cobbit, Ma Spanish School 2 plus additional when needed Foreign 100% 9 Cobbit, Ma Spanish School Spanish School 2 plus additional when needed Foreign 100% 80 Cobbit, Ma Informet calle Communication services 4 Foreign 99% Domestic 1% This year decreasing due security problems. 10 Cobbit, Afa Informet calle Communication services 4 Foreign 99% Domestic 1% This year decreasing due security problems. 20 Cobbit, Afa Lodge Lodgeng Start Tomporary 20 Cobbit, Afa Lodge Lodgeng Start Tomporary 20 Cobbit, Afa Lodge Lodgeng Lodgeng Start 21 Cobbit, Afa Lodge Lodgeng Lodgeng Start 22 Cobbit, Afa Lodgeng Lodgengg Stareagroff, Start	<u>14 년 년 15 12 14 14 14 14 14 14 14 14 14 14 14 14 14 </u>	Cuetzatienango Cuetzatienango Cuetzatienango Cuetzatienango Cuetzatienango Cuetzatienango Coban, Alfa Verapaz Coban, Alfa Verapaz Coban, Alfa Verapaz Coban, Alfa Verapaz Coban, Alfa Verapaz Coban, Alfa Verapaz Coban, Alfa	Tour Operator Hotal Tour Operator Tour Operator Spanish School Infernet cate Hotal Lodge Transport company Hotal Lodge	Lodging Xeta and sumounskings by non package tour operators to non package tours in the Xeta area. Field of specification nature and adventure tours. Spanish school Communication services Lodging Kodging Transport	2 plus additional when needed 33+7 temporary 12	Eusiness (30%) Others (20%) Foreign 100% Foreign 99% Domestic 1% Foreign 40% Domestic 60% Foreign 3% Domestic 60% Foreign 3% Domestic 60% Foreign 3% Domestic 60% Foreign 7% Domestic 60%	In Ouetzalemange area it is reported a growing market for Mouril & Bake stimulated by local and national competitions. There are obles based in Gustemala city. This year decreasing due security problems. NGO's growing. Seminar facilities allow them to receive them. Decreasing due the insecurity problem.

 Table 1.8
 Record of interviews with the Guatemalan Travel Trade (1)

eographic areas	Length of stay	Seasonahly
ermany, France, United Kingdom, Puerto Rico	According with package they stay from 1 week to 20 days or more.	Germany: Sep-Ocl; France (all year round AVA) (AVA); PR (Jun-sep).
Holfand, 2. Germany, 3. USA, 4. Canada	Domestic: 2-3 nights (bussiness). Foreign: 2 rights	Domestic: AYB;
	}	
SA and Euroe (Italian, French, Spanish and Germans) are	For USA market everything is pre-arranged whether they come in	
actional segments. Italians in particular	group or FIT.	
San Salvador; 2. USA, 3. Mexico; 4. Costa Nica; 5. Panama; 6. pain. Individuals: 75% (Corporate 90%; Leisure: 10%). Airlines:	2.5 nights Double Occ. Factor: 1.5	
pant, individuals, rolling (collocate edita, cesula, 1076), romas; 5%; Groups; 10%,		
ulopeans mainly	3-4 days in Pelen.	
paniards		
Ende of LEA of the A company Prove of Land		
Spain 2. USA 3. UK 4. Germany-France 5) Japan	1. Spain (12 days Avgo.), 2. USA (12 days), 3. UK (12 days). 4. Germany-France (12 days) 5) Japan.	1. Spain August, 2. USA AYR , 3. UK Nov-May. Germany-France AYR. 5) Japan (Nov-March).
light SFCO-LA-GUA (-SJOSE, Costa Rica): 50% Ethinic market, D's Business Mit; 20% Leisure mkt. The way Back: Leisure: 75%	Business: (30%) 5 days avge. Leisure: (70%) 15 days avge.	
usiness 25%.		
Selguim, 2) Hotand; 3) Canada; 4) USA; 5) Domestic tudents). Europeans spend USD \$ 70-100 while Americans	1] 8ekyum (20-23 days) 2) Holland 20-23 days); 3) Canada (7-14 days); 4) USA (7;14 days); 5) Domestic (students)	 Belguim (May-Dec), 2) Holland (May-Dec); 3) Canada (Bec-May); 4) USA Dec-May); 5) Dome
pend USD \$ 150.		(studenis)
ICE market could be a possibility for Guatemata given the fact as better hotel infrastructure than other Central American		
ountries. Ethnic markel is lorgotten and is very important.	4	
USA 2) Europeans (incentive travel).	17 USA (12 hours) 2/ Europeans Incentive: (Guatemata Antigua - 1-2 days: Lake Atitian 1-2 days; Chichicastenando &	17 USA from Nov-April.
	1-2 days; Lake Atitan 1-2 days; Chichicastenango & surroundings 2-3 days and Tikal 2 nights at least).	
ocal (25%) 75% (USA/ European)	1	
entral America: 50%; others: 50%.	Executives from Central America stays 2 nights, Americans &	
	Europeans stays a week. Tourist stays less than a week. Most of his guest are frequent travelers.	
ISA & Europe (sspecially germany).		
arity europeans (Belore, USA was 80% unbit travel wannings osted by American government in internet.	They usuallystay 1 right. Students in Sparish school stays about 3 weeks and start to travel after that.	· · · · · · · · · · · · · · · · · · ·
ISA, Israel, Holland, France are major origins: Europe oncentrales 35% of business.	Tourism stay only 1 right in Chietzaltenango	
uropo (france, italy, Switzerland, Germany in particular) epresents 50% of the total business amount. USA represents	They stay 1 or 2 nights in Quetzaltenango.	<u> </u>
epresents 50% of the total business amount. USA represents 0%.		
SA, Europeans (Germany, Switzerland).	4 students per month (4 hours lasson daily 5 days a week: cost:	
	USD \$ 100 all included room, meals witamily as well as tubor & lessons).	
uropeans mainly. Before also USA (they are not arriving ecause the "travel warning")		·
••• ••		
oreign people comes with NGO's; USA, El Salvador,	Groups: 2-3 days; "Foreign: 5 days ange.	August from El Salvador (vacations); June: medicine doctors from USA; Holy week and
		weekends: domestic. International events like Marathon, CycEng.
kimeslic: Studants, Christian groups; Foreign: (USA, Canada) Inistian groups, NGO's (raining activity people).	<u> </u>	
annan gruppi, maaris (darikiy badin) (bolise).		
Sustemata City , Ata Verapaz, Monicans, Spaniards and Salvadorans	Domestic: 2-3 rights; Foreign: 5 rights	All year round, July August (vacabons)
ISA, Canada, Switzerland, Holland & Gerniany.	Foreign: 2-3 days	
Juatemala City Antigua	2 days 1 night	· · ·

21

1. Results of the Surveys

	Location		Principal problems to promote tourism	Strengths of Guatemata
	Flores, Peten	Tour Operator, Iransportation	Access infrastructure; Not only roads but cruiships infrastructure also	Variety and richness of cultural & natural
1	Flores, Peten	services & Hotel Hotel	Missunderstanding about insecurity; Lack of gromation;	assets
2				
1	Flores, Peten	Transportation company	Tour Operators based in Gualemala City lend lo givo priority to sell Gualemala Highland (Anligua, Ouetrationango, Alilán) due to their familiarity. They are ignoriant of tourism possibilities in Peten.	
3			reserved on any reserved to be the mean remaining. They are ignored in or ouriskin possible at 192100.	
-	Guatemala City	Hotel	Guatemala needs a master plan to guido development as well as a budget. Master plan will establish Guate matan infrastructural needs to take advantage of bugo toruisn resources it has.	Beautifull country with hugo tourism
4			oosto maaan wwasaaccoranneeds to taxa aqvamage annoyo tolarsh rescarbos it nas.	resources in a relative small territory. Compared with Costa Rica, Gualema ha: Iol more to offer.
	Guatemala City	Aliane	1. Security; 2. Tourism facilities; 3. Tourism information; 4. Tourism education.	
5	Gualemala City	Airline	Arline didn't and conditions to the to Guaternata because: taxes, land permits and changes in	Gualema'a has a foi to offer.
		ļ	operational cost. Seal avaitability is not very large. Guatemala is insecure & violent.	
8	Guatemala City	Airline	CA is recovering of bad media covering (Mitch Hurricane). Insecurity is a big issue. An important lack of statistical data.	Guatemala has a lot to offer. In the past
			stansueto para.	passangers arrived to Guaternala in their way to other countries. Now they come
				directly to Guatemata.
1	Guaternala City	Tour operator,	Very limited quality brockures showing tourism resources and atractivness of Guatemata. Brochures	Arqueology-Colonial cities nature.
		Wholesaler, Transport	are not very attractive either.	
8	Guatemata City	Tetascord		<u> </u>
ĺ	adatentala Gify	Transport	11 Security. A focal programm is needed meching Mayor, Local police and even arriv; 2) Special branch at INGUAT to handle marketing strategy. Current actions arregular and with lines impact. Alventising campaign should be very important.	Diversity, Natural options in Guatemala a not used.
9	Gualemala City	Tour Operator	1) Security problems; 2) Education in tourism is a very important to cope with. 3) A good road network;	
		· · .		
q	Guatemala City	Association	1) mana nuteda ha zavisto (a bod on) och	
		ressourano()	 Image outside the country is bad not only cause insecurity issue, 2) Culatemala has not image at all. Foreign markets are not aware of Guatemala as a tourism country. 	
ĺ				
1	Gualemala City	Total Description		
J	outentia ony	Tour Operator		Culture (history) arquology; Textiles.
9	Guatemala City	Tour Operator	IT Security. Guatemata is in the media just with negative news; 21 in the cruiship busitiess port rates are very high (20 USD per pax). 3) INGUAT lack of resources to face tourism problems.	Natural & cultural resources. Nich history.
			are very high (zo upu per pau), uj induk i lack či resources to lace tourism problems,	Tradition.
 13				
	Guatemala City	Transport	Security. In local communities loanappers are stall in Irial. This events are surely negative for lourism.	Abundant tourism resources in Guatemati territory; Ruins, Antigua
14	Guatemala City	मन्त्रस		Chichicastenango; etc. Some people say Costa Rica is more atractive but he doos thick so the is criminally from Costa Rical
ł	oblicit dia dag	i Aliei		thick on the is cricit allo from Costa Bical A fol of fourism resources in a small femilory. Variety : Archeological, culture
5	Quetzakenango	Tour Operator	<u></u>	nature
				1
]		
g	Ouelzaitenango	Hotel	Lack of tourism development in Quetzaten ango area. Short saty of tourism, limited range of activity	· · · · · · · · · · · · · · · · · · ·
			due time and money which member can alford.	
17	Ovelzatenango	Tour Operator	Legal and instructional framework as well as coordination. IDEAEH, INCUAT, Ministry of Agriculture,	
	, i		Corre back. There are no rules for historic bukerings. Huminicality over nemicions but they don't	
18			and they don't allow others to construct a wait or a bathroom.	
	Quetzaltenango	Tour Operator	NGUAT chose 4 people as members of Quelzatenango Local Tourism Commitee but many of those working for Lourism do not consider them as their representatives. There is another tourism	·
1			Jorganization caled PORD hased on groups organized by INFOM (Instituto Nacional de Fomento Institucioal), which includes formet members of the Camata de Turismo. Consorcio de Cromator de	
19	Cobán, Alta	Spanish School	Turismo and Grupo Municipal de Gestión. This organization includes Tobricagán and Solda Penantments 1) Security. Government skould do something fast; 2) Bad quality of basic services 3) Teitres (/ew &	· · ·
20	Verapaz		(1) Security. Government stould do something last; 2) Bad quality of basic services 3) Toltes (few & Grty), 4) Air fares to/from Guatemala are too expansive.	Cobian has advantages for spanish teaching because one family receive one student. Antigua has a lot of students with
Ĩ	Cobán, Álta Verapaz	internet-cal-b	1) Security; 2) Intormation, Maps; 3) Hotels 4) Bus schedule.	cos famile Cobart: natural resources
21				
<u> </u>	Cobán, Alta Verapaz	Hotel	1) Hoad network is a aproblem for TO's [altought they don't work with that segment]. 2) Security. 3)	Nature, food, adventure & eco tourism
			Services. By example, S Champey has not restaurant facilities, water, and good toilets	
	Coban, Alta	Lodge	Poor general access to isovist sizes and unappropriate facilities. People awareness of isovism benefits;	
22			rivol general avoids to lound size and unappropare lackrises. People awareness of tourism benefits; involvment of local community.	
	Verapaz			1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
	Cobán, Alta	Transport		In Coban: Natural attitractions
	Coban, Alta Verapaz Coban, Alta	Transport company Rot⊉	1) INGUAT's promotion concentrates in traditional areas, they don't offer other attemption 31 Dimension	In Coban: Natural attiractions.
23 24	Coban, Alta Verapaz Coban, Alta Verapaz	company Hot剌	1) INGUAT's promotion concentrates in traditional areas; they don't offer other alternates. 2) Promotion 8 identification of places; 3) People of Coban needs wimplification to impel Coban resources.	
8 28 18 18 18	Coban, Alta Verapaz Coban, Alta	company	 NGUAT's promotion concentrates in tradicional areas; they don't offer other alternates; 2] Promotion is identification of places; 3) People of Coban rends winoitration to impel Coban resources. Acces infrastructure 	

Insecurity				
disectury				
a) Tikal doos not have a tourism a tourism plan; they should intro or cheap.	i plan; carrying capacity is not sel arx duce a priority scheme. There is a la	I the site is open for 24 hours ck of "estandar hotels" in Pete	; 6) Local government does an, Hotels in Peten are very	nol have expensiv
Gualemala don't know how to m	iake full use those resources. Insecu	rīty.		
Lack of coordination in lourism a	activity. Lack of comunication. Inexist	ance of clear objetives and or	ตลกไขสมัดก.	
1. S. 1. S. 1.				
Gualemata es an atractivo desti insecure, Besides, city facks of i	nation bul insecure and unstable. No urban activity such as inuseums & of	body is interrested in Guatem iers, That is why foreign goes	ala city cause is dity, noisy ; directly to Antigua from airc	and xort.
:				
ack of execution Gustamala	is not known in the world. Security is	s major concern Lack elles	and accord to work to being	locusto.
	and a work. Secary is	a major concern: cack of aas	тао реорга то мотя ит вачет	кюцэцу
	· · ·			
1) Insecurity; 2) Lack of confider	nce in authorities. Lack of lidership.			
<u></u>		······		
	1			
			. <u></u>	
/ /	1			
Number & location of hotels, roa	ids, etc. Development of human reso	irces; Strong weakness in se	aunty problem.	
and of protessionalism (onvale	& public sector) handling tourism			
-uslematon poople tend to be o	lose-minded to foreign tourist (??).			
ossielingigi people tend to es e	and a manager of the second seco			
· · · · · · · · · · · · · · · · · · ·				
				•
· · · · · · · · · · · · · · · · · · ·				· ·
cooperativa. There are many gr in Xela, and the quality of servic here don't get together.	colonicians are more hardworking and oups that are not functioning because ses are not high. Hotel staff needs mo	s entreprenunsi, cuatematan people can't think of group b re training. Camara de turism	s rend to be passive, obecler enefit. There is a lack of hole to is net functioning anymore	els room els room e. People
Quelzaltenango is a less known	destination due to the tack of tourism	promotion.		
•			-	
	·	· .		
This type of tourism has a lot of and Quetzattenlango)	mobility. Coben has no places where	people can meet to talk. This	i is looked for tourist (Re in a	Antigua
Lack of information	 	<u> </u>		
(r == 0.11240.114			, ··	
· · · · · · · · · · · · · · · · · · ·				
acces intrastructure; security, 1	acifibes (lood & Beverage) Lack of pro	motion.		
		· · · · · · · · · · · · · · · · · · ·		
			5 A.	
Lack of efficient transportation (They always have an emergency can	behind the bus to help them	at any unregidar eveni). Def	ficient
Lack of elficient transportation (quality of service. Acces initiastructure; Lack of pro	· · · · · · · · · · · · · · · · · · ·	behind the bus to help them	at any unregidar eveni). Def	ficient

C	ble 1,3 Location	Type of business	l of interviews with the Guatemalan Travel Trade (3)
•••	Flores, Petén	Four Operator,	 They offer: mini-lour options (1-2 nights); The Highlands (1-7 rights); Peter (1-2 nights); Maya World (3-7 nights); Eco-argoeoology (1
1		transportation services & Hotel Hotel	4 nights); Short Excursion (half or full day).
	Flores, Pelên	riolei .	
2			
	Flores, Paten	Transportation company	The company subcontracts the operation of lours in Peter from major tour operators in Guatemata (with thin profit). Sets their product brought its connections with TO as well as advertismont in magazines. Tkal tours is the best settiong tour, Next in the ist are ceited &
		consean	lonos na obstancial wan for a waa s governamina magazines. Nan ioa s in ito ost sancing ioar, ven in ine ist are cepara k Yaza, Less popular El Mirado and Syachika, Rivers product are considered important. J day trip to Ceibal, Dos Päas & Aguateca is Npical kinerary. Trips to Yaxchilán use Posada Maya en Behel (basic bul notbad).
;	Guatemala City	। स्टब्स	nyiwa kalenayi. niyo ta'uman ose nasada maya en cemer (dasio ou natada).
	,		
ł			
	Guatemala City	Airline	Route Gualemala City-Flores-Cancun & viceversa. Take off early morning came back alternoon. Finday and Sundays goes to Cancun coming back afternoon.
Ę	0		
	Gualomala City	Airline	Europeans prefer Costa Aica but beging there they realizes Guatemaia is an 'errolic' country (so they perceive the country) where they can have an adventurous experience, somethig europeans thes very much.
	·		
e	Guatemala City	Airline	
	Guatomasa City	-01101.6	Gualemala has a loi lo olfar (more than costa feca). Actually teurist are somehow disappointed after Costa Rica hip.
-	[
-	Gualemala City	Tour operator,	1) Highland tours (100% takes ii); 2) Arqueological tours (75% takes ii); 3) basic Services & Tours (100% takes them), and Special
].	Wholesaler, Transport	packages.
\$			
	Guaternala City	Transport	a) They plan to share codes with MX Artines from to Mexico; b) They plan to ity from Miami probably next year. C) United might buy
			Maxicana Airline in the future. This would strength Guetemela in the mexican makil (which the says is for leisure as well as for business).
5	Guatemala City	Tour Operator	Doubless served a control of the served of t
	Ciccionidat City	row Operator	Package tours in camping, adventure and arqueological liours (7-10 days duration).
10			
	Guatemala City	Association	
	1		
		1	
ļ	Qualanala Chi	[
	Gua'emala City	Tour Operator	
12	Guatemala City	Teur Operator	1) Antigua; 2) Alillan; 3) Bkal; 4) Gualemata City; 5) Coffe Finca; 6) Sugar plantation (combining arqueology & Museums); 7) Fishing tri
			(a) Trip to Copán (Honduras). (b) Trip to Copán (Honduras).
13	1	1	
	Gualemala City	Transport	Gualemala - Houston (2 daily flights) ; Gualemala - Naviark (1 weekly fight)
		1	
	Gualemala City	AGIA	
11	j		
	Quetzalienango	Tour Operator	In addition to typical interantes, bord watching, volcano lours. Typical tours Cathadral, Municipal larany, Museum & others related with Maya culture. Hot springs, Zunit and Sabaja, Spanish Schools: 9 weeks lessons and Iraveling individually for about 4 weeks.
]		maya custure. Hot springs, zunit and Salcaja. Spanish Schools: 3 weeks lessons and traveling individually for about 4 weeks.
11	Quetzallenango	Hole	kilomation in tourism guides. Quetzatenango, Totonicapan, Nomostenango, Atmotonga, Zurit, San Martin Sacateoecuez, San
	accontractionango		Francisco in outsing gudes, coeracterango, roomospan, womoslexango, amosonga, curs, san Mater Sacatepequez, San Fransico el Alto, Spanish Schools (more than 10): They are second in number in Guatemala after Anligua. Main attraction: cheaper fee Justion and Mang dogt.
12			roman and many cost.
-	Overatenango	Tour Operator	Santa Maria active Volcano . Santiaguto and Fuentes Georginas are the principal lourism objectives in this area. Finda Ecologica in
			Relative and NTRA are also important locations attractions, Passie Enriques is owned by more than 10 people and their leansts to be relative to point. This makes historical use of the historical building very difficult (tenant les is also very ofeen which is a phy). Many limits in Video room from San Dirichold de la Costa at Union protection at their and so that the limits to their
18			tourists in Xeta come from San Christobal de las Casas in Neuco Integrating a lounist route. San Christobal Xeta Panaghel. Volance are a principal attraction for domestic tourism. They may be interested in cultural aspects il good programs would exist (such as Maya Aller, Maya cineti and tractional reactions through).
	Quelzaltanango	Tour Operator	and para a substantia contest durant, may hay be meresed in curva aspects rigoto programs would ensit (such as May Mark Mark contest and raphonet parker in cambra and and a substantia aspects rigoto programs would ensit (such as May Mark Mark Contest and Parker in Carlos and Mark Mark Mark Mark Mark Mark Mark Mark
			To have a second and the second and the second second second and second and second and second and the second se I down more second second on hing indigenous cultures is more efficient than those based on nature. Many of the Spanish schools in Xela are operated by NGO's that do not expect opolit. Many of the schools include visits to neighboring fourturistics in their programs,
19	}		which considerable constraints four operators and travel agents.
	Coban, Aka Verapaz	Spanish School	Spanish school were important to promote tourism to Antigua and Xela.
2			
	Coban, Alta Vetapaz	Internet-café	
~		1	
2	Coba >, Alta	Hotel	Colle Findas, Orchids nursery; Hey Marcos caves, Semuc Champey, Languin.
	Verapaz		
2	,		
-	Coban, Alta Verapaz	Lodge	Camping. They are trying to build a eco-lourism contages to bring this type of lourism.
	3		
2	Coban, Alla	Transport company	1) Semuc Champey 50%; 2) El Estor, No Duice, Uningston: 30%. Mantel for his places: 50% locals: 50% internationals.
	12		
2	Verapaz Coban, Alta	Rotel	
	Verapaz Coban, Alta Verapaz	Hotel	
2	Verapaz Coban, Alta		Bitberry farm and bodge with recreational activities.

•

ormally they are adult or elder people (more than 40 .0.)There are a lot of women traveling in groups. People	Yauja, Nakum, Dos Pilas, Arroyo do Piedra. Alfa Verapaz has a very nice and interesting places.
.0.)There are a lot of women traveling in groups. People on Puerto Bing are yourger than europeans.	r telefor fear and a so the set of the set o
on Pueto Rico are vounder (han europeans. coupes mainly (no chidren or traveling wilhout (hem); 0-30 vp (10%); 30-40 vp (40%); +40 vp (20%), conomic status; middle class. Deutch are older people	In Las Flores surroundings; Palencilo; El Mirador del Rey Kanek
conomic status; middle class. Deutch are older people	
n general.	
	3 day trip to Sayaxche area could be combined with linerary to Yaxchilan.
	Izabal laka; Volcanos.
· · · ·	
ged people that needs facilities and good instalations. oung people is backpacker whom demand simple or	Ecolourism Peten.
ery simple accompositions and facilities.	
· · · · · · · · · · · · · · · · · · ·	Ecotourism is in the way to play a major role.
-	
	Guatemata is the most important city in CA region. She considers MICE market should be developed. She has heard about Cot
	specially for ecolourism development.
werage 50-60 years old, In general traveling in couples.	1 x x y x x x x x x x x x x x x x x x x
	1) Semuc Champey; 2) IRTRA (Relabilieu) 3) Aguas Georginas.
·	
	El Peru, Yaxia, Nakun,
	Nahurat resources (Alta Verapaz).
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a de la companya de l	
nradsa of business fravaters. Fri Johnness Guatematan	
verease of bisiness lravaters. Ex-retuyees Quaternalan rarke is also attractive since they often go back	
norsásé of businéss kavalers. Ex rekuçees Guatemalan rakki is also altractive since they often go back elveron Modamenia ard Guatemala to see liteir	
norease of business travalers. Ex-refuyees Guatemalan tarkki sako attractive since thay often go back everon Nordinamica and Guatemala to see their uméres & friends.	
ncrease of business travalers. Ex-refuyees Guatemalan narkki kabo attractive since thay often go back exercen Nordinamica and Guatemala to see their améres & friends.	
norease of business; travalers. Ex refuyees Guatemalan rankel is also attractive since they often go back evenen Nordmenics and Guatemala to see their améres & friends. Reifly busseries from otheir countries.	A favorus bet surged in amed Friedda's Galeriana - San Francisco et Alto madeat
norease of business travelers. Ex refugees Gualemalan parks is also attractive surce they often go back elveron Molamenta and Duatemala to see their analise & Monda. Rostly bussness from other countries. Sudents visal this country with two objetows: 11	A famous hol spring named Fuenløs Osórginas. San Francisco et Alto markat.
versase of business travelers. Ex refugees Gualemalan parks is ato attractive surve they often go back elveron Noramenta and Gualemala to see their parkers & triends, locally busines from other countries. Sudents visit this country with two objetnes: 11 dunities; 21 learning Spatrick & indigenous languages entratify they make groups of 15-30 members of which.	
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ng ourspection was sparsed schools. ndependent traveler to Ouzerizatenarigo is 60%. They tay 1.2 rights. 15% young people (20.35 yo). Backpackers. Marky itudents. suppears arrive in couples. Young people ecoloruism xiented, Once in a whate a group. Sciences people; Seminars and ROO's people, rankers. with takion (nor E. Skatydorf Hoo's people, rankers.	Very alfractive are San Andres XecUI (à yéðow church), San Sinon and San Barlalo. For cultural originiation in CostLaternargo: User is an dea to infoduce 'Tours of Conquest'. The tour Content would be to visit historic places of war between Pedro de Anando and Tecum Uman such as tos Majadas. Lanco de Pinal and Okniepeque. So other possibilities for the area are: Glass factories in carde, maimba musich is San Juan Ostuncako, the first church in Cantral America and weaving in Sacarja and referious ceremony at Laguna de Chicabal. Athough Coban is abundant in nature resources (including indigenous culture). INGUAT takes no interest on it. Coban don't err has an information Office in the city.
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noresse of business travelers. Ex relogues Gualemalan parks is ato attractive sure they often go back eleven Molamenica and Dualemala to see their anties is friends. Kosify busines from other countries. Sudents viail this country with two objethes: 11 dunlaer; 21 learning Sparish & indigenous languages energy they make groups of 1-50 members of several intervaling and abcut 20-25 groups arrive a year. Naméss travelers, Spanish School students, nerviewee considers that just about 5% of lours in mining at Guatemala apport one down to heartain they make groups of 1-50 members of heart interviewee considers that just about 5% of lours in mining at Guatemala apport one down to heartain they may apport one down to heartain they may apport one down to heartain they make to be able to small profit ind competition with Spanish schools. Network arrive in couples. Young people ecoloruism intervalent and UKA and they look on rature, a parkets arrive in couples. Young people ecoloruism indered. Once in a whate and they look for nature, anariship. At El Salvador (Di oter Ala Verapaz. Assertias) proposed from other Departments of Sustensal, Freining beogele from other Departments of sustensals, Freining 20 loog 70.	Very alfractive are San Andres XecU (a yebow church), San Simon and San Barlalo. For cultural origination in Cleatrateriange: there is an idea to introduce "fours of Conquest". The four content would be to visit historic places of what between Predocide Naturado and Tecum Uman such as to Majadas. Users del Prinal and Originegrop. So other possibilies for the acts as cleass featories in carde, marina music in San Ason Osuncator, the first and the print of the set as America and wearing in Sacada and referons encores (including indigenous culture). INGUAT takes no interest on it. Cobin don't en has an information Office in the only. Candelana, Lachua Lake, Chizor Horoelectric (reservor for fishing & marine activities jet-skit, so forth).
strasse of bisiness lravelers. Ex relugees Gualemalan strate is ato attractive since they often go back eleven Notamenica and Cuatemala to see their sinkes & friends. Solid busines from other countries. Statemist year make a strategies in the countries. Statemist year make groups of 1-50 menters of which instanting the country with two objetness: 11 counters, 21 learning Sparish & redgenous languages energing year makes groups of 1-50 menters of which its are prevaling and about 20-25 groups arrive a year. Supress travelers, Spanish School students, reverves consisters that just about 5% of locurs in mining at Guatemala arroot come down to business functions subject to students, retrouge and student make to be ause to small prote of competition with Spanish schools. They for the student students, segeendent traveler to Chizentzatemargo is 80%. They tay 1-2 rights. Ste young people (20-35 yo), Backpackers, Mainly tudents, segeendent traveler to Chizentzatemargo is 80%. They tay 1-2 rights. Ste young people (20-35 yo), Backpackers, Mainly tudents, segeendent fraveler to Chizentzatemargo is 80%. They tay 1-2 rights.	Very altractive are San Andres XecU (a yellow church), San Smon and San Barlolo. For cultural orientation in Custuratersarge: there is an idea to structure Tours of Conquestr. The tour content would be to visit fishing places of war between Pedro do Altrando and Yecum Uman such as tos Majodas, Llance up Prival and Oknippeque. So other possibilities for the area are: Glass factorias in conte, marinda music in San Juan Ostuncako, the first of unch in Central America and wearing in Sacarja and referious ceremony at Laguna de Chicabal. Although Cohen is abundant in nature resources (inducing indigenous citikure). INGUAT takes no interest on it. Cobin don't en has an information Office in the ony. Candelana, Lachua Lake, Chicol Helfreetechic (resencer for fishing & marine activities jet skil, so forth). Chachaga; Chivox.

c Loca			Infrastructure necessities	Legal requirments to improve tourism activities
Flore	es, Pelen	Four Operator, transportation	Lack of information, Lack of infrastructure (roads)	He thinks visitors pays a lot of taxes: Leaving the country, comption at border
Fiore	os, Patén	services & Hotel Hotel	Roads to different argueological sites	
				Tourism tax. Tourism sector is not agree with this fax. Private sector don't kno allocation of this resources. We need to create tourism police organization ;
2				
Flore	es, Palén	Transportation company		
		company .		
3	emala City	મગસ	Palanakan ranga tanga tang	
Guu.		a lorer	as a budget. Master plan will establish Guate matan	Legal situation is important to stop crime. It seems that nothing stops louist tobbery.
			infrastructural needs to take advantage of huga tourism resources it has	
Gua	itemala City	Airline		Crid Aviation law. To bring people Guatemata needs an open sky policy.
5				and a second proton a second
Gual	lemala City	Airlina	Major hubs for European to Guaternala are Houston & Marni, Europeans fly to Cancun cause is very cheap. However to fly	He considers that government is not interested in developing new places to
			1000 Calcut to Central America is yoon avoantive. There was	promote among toonst.
6			some people coming from La Habana because there are direct flights from that city. Main market so far: backpackers.	
Gual	temata City	Airline	· · · · · · · · · · · · · · · · · · ·	· · · · · · · · · · · · · · · · · · ·
			· · · · ·	
τ				
Gua	emala City	Tou: operator, Wholesaler,	Al boarder points (better and not corrupted procedures). Maintanence of road system which have to be improved.	taxes: 20 % on everything. Eliminate visas from some countries (Rep.
ļ		Transport	normandrad of reactarysteric indical have to be inproved).	Dominicana, Former Soviet block, Asia countries, Singapre. Civil Aeronautic Law is trying to protect nationa carrier (TACA). Howover, he thinks it is useles
8				cause there is nothing to protect.
Guat	temala City	Transport	1) Airport in Guatemala City; Orientation and short runway are	Foreign investment needs a proper environment as well as a clear legal
		•	a main problem Ha mentioned 3 minor accidents, Airport should be moved out the city.	framework (Financial, security and laxes).
9 Gue	emala City	Tour Operator	and the second	
, coa	a ony	, and operator	Hotel accommodation is concentrated in Guatemala City but there is a lack of good accomodation in other Departments	
10			rural areas	
Guat	ternala City	Association	A couple of key issues are: Lack of infrastructure (access roads that inhibits potential and services to use them) as well as air	1) INGUAT Organic Lawnow in the Congress is very old and requires to b
			that phons potential and services to use them) as well as air service. TACA is not acting as a "flog carrier" because they even cut at service to Guaternala something that affects	1) INIGUAT Organic Law -now in the Congress - is very old and requires to b up to date, 2) Quaternata needs an Open Ski policy. Domestic demand is not storing as to be arraid of this, all to tring people is a different matter. In this content competition is a good matter for Quaternata, 3) law to Promote Touris memory and to be element is at incentives. Nonvoir, since 1958 they were dominanted. If some element is at incentives.
			even cut as service to Guatemata something that affects Guatemata capacity to bring tourism. Museums opening time	context competition is a good matter for Guatemala. 3) law to Promote Touris
			is also restrictive.	eliminated, 4) Rolet categorization. Hotels decides by his own, That is problematic. 5) Guatemala also needs a good transport and Tour Operator/
n				Travel Agency regulation.
Gua	emala City	Tou: Operator		
12		11 A.	and the second states of the	
Guat	lemata City	Tour Operator	Cruise terminals in both sides: Pacific and Canbbean. Small	Civil Aviation law is a main issue.
			Marina for yatch market in Uvingstone. Gualemala needs small (but very well designed) airtips instead big airports (Los Tablones in Copán is an example), it requires imaginative	
			design not huge amounts of money. A road between	:
			Vesign not hoge anounts of money. A negative magname Velahermosa (Mexico) and Palenque. Guatemala via Bethel. Honouras is building a road that wig easily connect. Puerto	
13	emala City		Santo Tomás (Guate) and Puerto Cortés (Honduras).	
004	emara oray	Transport		
14				
Gua	Temala City	Hotel		
15				
Quel	zaltenango	Tour Operator	Hotels, restaurants, services in general.	
16				
Que	tzaltenango	Hotel		
	1			
17 0ue	tzalenango	Four Operator	·	
				Legal and institutional framework as well as coordination. IDEAEH, INGUAT, Manistry of Agriculture, CONAP, SEGEPLAN, INFOM, and other institutions
ł				Lege and inscructions and involve as we as coordination. IUE-LET, INGUAT, Ministry of Agoicuture, CONAS, SEGEPLAN, INFOM, and other institutions come with ideas and questions but they don't come back. There are no rules informic buttings, Minizigatity gives permissions to destroy buildings and they don't allow others to construct a wall or a bathroom.
18	Izatenango	Tour Operator		cont abow others to construct a wall or a bathroom.
0.04	seascendi yu	ion obsigior		
19	G 14	6		
	ván, Alta açaz	Spanish School		· · · · · · · · · · · · · · · · · · ·
20	an, Atta	nternal		
	an, Ana apaz	Internet-cala	A lot of infrastructure needed.	Local advise even for local investors in tourism business.
-				
21 Cob.	ian, Alta	Hotel	1) Roads and their maintenance. At the Botopo the loggy	
Vera	epaz	l	weather is risky.	
22				
Coo	ian, Alla	Lodge		
	apaz]]	
23 Cob	an, Alta	Tracsport	Insprovement of access infrastructure (paying roads &	
24 Vera	apaz	company	maintenance }.	
	an, Alia apaz	Hotel	Roads improvement, Irash disposal system in Coban	none
		Lodge	Acces roads	
Cob	oan, Alta	casgo		
26 Vera	apaz Jan Alta	Tour Operator		

 Table 1.3
 Record of Interviews with the Guatemalan Travel Trade (4)

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mandal supports required	Human resources development	Participation in conservation efforts	Selang methods
	,		STP representatives participate in Fair and Road Shows (Bedo, Madrid, etc.)
	A lot of training is needed to improve language shills and		Road Shows (Berlin, Madrid, etc.)
	service. Human resources is a difficult matter in Petern. Lot of rotation in hotels. Peter youth visualize tourism work as a supplementary activity. Efficiency is low. Wages: Room mald and front desk: 1, 100 Qbm; Manager; 5,000 Qbm.		
·····	and right deskt 1, thu gan; Managar; 5,000 Q/m.		
			1
ach department needs to reate roads & Inns (paradores)	More or less. Tourist guides should be trained to be very protessionals. Tour guides are good but Guatemata requires a	They work with community in a case to case base. Christmas by example,	HOUAT should pay more attention to cer
nd nice restaurants. overnment should support this westment.	high level school to ensure quality.	together with Copa and Continental, they offer meals, candies and toys to	promotion request.
	Guatemalan are kind people this is also a natural resource. They just need to know how to handle tourism.	coor people. They participate in some initiatives (free tikets). They also sale low fares to local people.	They are selling Guatemata as a product. They use Internet and participata in touris fairs and events.
	Gualemala is improving in this sense. Universities now have courses oriented to train people in tourism.	10	There is a lot to do (she compares Guatemata with Costa Rica that has done
•			excellent markeling job).
	Lack of human resources to cope with tourism professionally.	When specific request is made. They suport cultural activities (museums).	The send a Newsletter every month, it h been a very effective promotional tool
	, ·		Peòple even ask for it.
			They go twice a year to LA & Sico to pron Gualemata among TO & Travel Agencies
			uuusimaka antong sU & Trayel Agentries
Via and Baja Verapaz have	People working in the lourism field in Guatemala are mostly	Theu and so the second	Augumpho accurate
in and by veryour nave ood conditions to develop a atural tourism product. Navever they required support .	r dops working in the constraint and in constraint and income practical. But its improving since 5 years ago there was nothing related with this. The process has just started.	They participate in a "Permanent Forum of Ecotourism & Conservation". They act as a catalyst.	Guaternalia promotes only 4 products. Oil are forgotten.
	· · · · · · · · · · · · · · · · · · ·	· · · · · · · · · · · · · · · · · · ·	INGUAT has no stable strategy based o the community. New administration shoul
Wything that strenghts	Gualemala needs a kil more professionals in this field.	They helped financially to conduct EIA	set a defined strategy to achieve the goal Guatemala should consider to premote 3
ducational activity. INTECAP, Trivate and public university eval. Guatemata needs a lot nore professionals in this field.		studias.	hotels. They would be more suitable for domestic lourism which is very important fourism activity in the future.
	:		
			Artimes holds seminars in the USA for To Operators, hotel people and other travel related parsons. They also publish every year a magazine related with Latin Americ
	People needs to be trained to receive tourism. Guatemalans need to be more open (?) to webcome tourism.	They support people to conserve nature at Cerro Cohuic in Tikal and Cerro San Git in Izabal lake.	The company participates actively in fairs They undertake thematic festivals.
	· · · · · · · · · · · · · · · · · · ·		Although the most promoted places are and Antigue, they promote Spanish schoo among universities.
·			
	· · · · · · · · · · · · · · · · · · ·		
:			
A lot of tourism activitias equires support specially small and medium enterprises.			Foreigns arrives because "Lorely Planet" They only mention Servic Champey and there are other resources. No into on other attractions. First contact is Panajachet ar
	They raque training (they train their own people).		Antiqua. They advertise in co-op with other organizations. Magazines, so forth.
	· · · · ·		They have an international recognition na A web-page and are in the INGUAT direc (sometimes they send people to be lodge
			Special contract with ractio broadcasting.
Educational & training activities equires strong support.	It is required up to date training for executives and governmen officials.	no	Brochures, personal contacts, Web Ste Chammber of Commerce (it doesn't work well), Tourism Commission in Cobán. Cobán and his attractions requires Intern
requires strong support.	officials.		Chammoer of Commerce (it doesn't w well), Tourism Commission in Cobán,

1. Results of the Surveys

Malata 4 A	The second states which the state of the second states a sub-
Table 1.3	Record of Interviews with the Guatemalan Travel Trade (5)
10,010 110	The second of strengthe state and controlling that the state of the
	the second se

	Flores, Pelen	Tour Operator,	The whole Guatemata atthough there are people that prefers	Little assistance from tourism authonities. Lack of information, Lack of
1		transcortation	archaeology.	Infrastructure.
	Flores, Pelén	servicos & Hola! Hotel		······································
2				
	Flores, Peten	Transportation company		
3	Gualemala City	Hole	He goes back to a master plan. There is no clear image of Gualemala	Security is a big issue.
4			whom has a lot to offer. This have to be turn to Guatemata advantage.	
	Gualemala City	Airline	Gualemala needs to Improve Image.	Security. They are sometimes alraid of conditions.
ľ	Gualemala City	Airling		· · · · · · · · · · · · · · · · · · ·
6	Guaternala City	Aldine	Gualemala sells tradicional indigenous people. A cicrient video presents the variety of country's tourism resources. This is good. Guatemala has a bit to offer within a reasonable small area.	Pone
7	Guatemala City	Tour operator, Wholesator,	INGUAT people has a very limited vision of lourism due his lack of	High telephone cost, lack of information, poor driving monthions in
	. *	Wholesater, Transport	experience in travel. They don't know what other countries do in this respect. Stogans used to advertise Guatemala reflects this lack of experience.	Righ fellephone cost; lack of information, poor driving conditions in Guatemalian roads. Some maps at INGUAT are sold (this should be free
1	Gualemala City	Transport	Guatemata needs a new image to promote outside. Something with resources Guatemala has.	Taxes in Guatemala are bigh.
9	Guatemala City	Tour Operator	INGUAT has to diversity louism image of Guatemala to include different tourism resources.	·
10	Guatemala City	Association	1) Qualemala has not image at all. Foreign markets are got aware of	
			1) Sustemate has not image at all. Foreign markets are not aware of Guatemate as a tourism country. 2) Guatemata promotes only 4 products: Tital, Antigua, Chichicastenango and indigenous culture.	
щ	Gualemala City	Tour Operator		
12				
	Guatemala City	Toux Operator	Guidamiaa needs to develog tourism products with identity docat Navor in lenns of images and tastes.	Ro special complains. Somelines they complains about improfessional " athludes.
13	Gualemala City	Transport		
14	Gualemala City	Hotel	Guatemala needs more promotion to let the world know the Guatematan resources. Foreign people have a strong image of	· · · · · · · · · · · · · · · · · · ·
15	Quelzallenarigo	Tour Operator	earthquake, violence, robbery and guerrilla (in spite of Peace Agreements).	Transportation is a main source of complains: lack of, or poor service.
				Taxis very expensive. Low flexibility to establish travet increaries as bus transportation is concern. A minimum number of pax are required by loca tour operations in order to arrange suitable transportation.
16	Ouetzaltenango	গন্ধৰ		
17	Queizaltenango	Taur Onesator		
	uncunctrango	Four Operator		
18	Quetzalfenango	Tour Operator		······································
			· · · ·	
13	Cobán, Aka Verapaz	Spenish School	<u></u>	
20	Cobán, Alta Verapaz	Internet-cale	YYe should promole green - clouds - péople.	
21	Coban, Afa	Hotel	There is no information and Verapaces Image is very poor and negative.	Roads
	Verapaz			
,	Coban, Ata	Lodge	·····	1) Public transport is very bad, 2) Insecurity.
	Verapaz		1	1
		Fransood	· · · · · · · · · · · · · · · · · · ·	
23	Coban, Alta Verapaz	Eransport company		
23	Coban, Ata	Transport		Area requires beller restaurant servicas; Cobán requiras a 5 star calego Notel for domestic tourism.
23 24 25	Coban, Aita Verapaz Coban, Aita	Eransport company		Area requires beiter restaurant services; 'Cobin requires a 5 star catego hold for donestic burism.

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	rk w louinit security & protection. More information
a) Tikal does not hi introduce a priority	ave a lourism plan; carrying capacify is not sel; b) Local government does not have a tourism plan; they should scheme; c) There is a lock of "standard hotels" in Peren.
with covernmental	ier Plan (netviding inizis/nuclure and a marketing plan). Toorism police outside the city: Education (how lo deal with digenous communides, Bring specific Tourism (Wholesalers of different countries (they would evaluate what is has to work in destination ambiance) (gatabage is a big issue). INGUAT should be private; Gorennment should work hering. Continuenty. Consistency of products and planning. That's why INGUAT should be private; ensure continuity (succension) and planning. etc stotes contrainson. Better communication process. Set up objectives and reginarization; respect individuals and atential needs to expand air routes. She timics Europeans living to Caribbean can be attracted to Guatemata. millog & Duelto from are additional options:
	mbgo & Puerlo Rico are additional options Dicipation should be improved. International activity and planning is very urgent.
	· · · · · · · · · · · · · · · · · · ·
invitation Guatemat	ed training. They should be high quality well paid experienced professionals. They should be markeding oriented, am's is required to improve activities. Guatemats has to speciate an arqueological and culturationism. INGUAT closer to industry representatives. Tourism industry has to be handle with ethic. Everybody has to understand ta has 1, ack of confidence between public and private socior. Lack of unity among lravel industry. Co-op for isse hotel & air service. Keep tourism buses in good condition.
NGUAT needs: 1) evaluale tourism; 3	lo be more involved with lourism in Gualemala; 2) tak more with customers; 3) create a system to measure and 3) use financial resources in a proper way.
Advertisement in I Mexico and Cancur	Recco could be good due the amount of foreign visitors coming from Cancun. Guatemala is often sold together with n. The limited budget in promotion & advertising should be oriented to the most beneficial market/method.
adequate statistics statistics. They are coordination with m	abon among different participants (puble: & private) in order to avoid isolated efforts. 2) Strong communication with raiss in order to get better coardination with private entities. 3) improvement of statistics. Guatemula doesn't have for decident making (by example: a) eithic market is not included in statistics (b) even hold sector demands willing to give information at least big holds. Chamber of Commerce has an initiative in this respect. 4) Improve nuncipatines, defining very clear set of responsibilities and priorities, to avoid future conflicts. 6) HIGUAT should there are not criteria to define what should be included in those priorities. This led to conflicts.
Security problem is However, they do n	s a very important one. INCULAT should take likes very servicely. Apparently, INCULAT leaten to primate sector, nothing elsa. In order to reflect private sector opirion, monthly meeting with each association should be establish.
Mundo Maya Work Important issue, It s	d is holding a lot of opportunities. Guiltemidia need to relate opportunities. Lot of unity in the travel trade is a visiy si very important to have a single or multiple orientation; back to education.
NGUAT is making money!! (10% of ai	a so, so promotion. They should be mixe aggressive in campaigns to ture USA and European market. They have rfare tickets sold in Guatemata).
NGUAT should ma	ake elforts lo gel rid of criminality. Bueternata should increase promotion.
NGUAT allocate m	namy for promotion and little for development. INGUAT's officie at Cuelzakenango is just an information center and SUAT.
	· · · · · · · · · · · · · · · · · · ·
iNGUAT should all iourism sites.	ow displaying private company's brochures at their office. NCUAT should work in infrastructure and services in major
NGUAT has to par	ow displaying private company's toochures at their office. UKGUAT should work in infrastructure and services in major Richaste more closely with Coban tourism industry. They should open an office in Coban for information and I should promote different resources (not just Champer). They are a tot more.
indiana sites. Inguat has in par promotion, inguat	There is a stand with Cable burger, not were They about men southers in Cable by internation and
INGUAT has to par promotion. INGUAT Advertisment for Co INGUAT should pro	nicipale more closely with Coban tourism industry. They should open an office in Coban for information and T should promote different resources (not just Changer). There are a tot nore.
INCOUNT has to par promotion. LINGUAT Advertisment for C INSCUAT strong pro resources they hav	tricipate more closely with Coban tourism industry. They should open an office in Coban for information and T should promote different resources (not just Changey). There are a lot note. obtain in English. A Web Page or a link with Coban resources and services. omote Las Verapaces. 2) Promote access reads to fourism resources; Even people from Coban don't know at re. Fam trip for travel industry (foreign & national).

1	Location		Tecora of Inter	VIEWS WI	th the internatio	nal Travel Trade (1)	
			Latin Latin	Employees	Customers' origin: foreigr/domestic		Geographic areas
	Dallas Fort Worth, USA.	Tour Operator Wholesaler.	consolidated bussiness		USA	USA market to Europe is mature and growth rate very slow. Latinamérica, after so many troubles in the socioeconomic & political situation, is improving the flows into the region cause yet market is	
28	· · · ·					inmaturo,	
	Los Angeles, USA	Tour Operator/ Wholesaler.	Corporate and telsure	6	USA: 40%	· · · · · · · · · · · · · · · · · · ·	Europe, USA (40%), Canada (the are contacted via Internet). Maj market for Guaternala: Germany,
							Italy, USA.
l		1			÷		
29	Los Angeles, USA	Tour	Tour Operator/	3	USA	Flow to Guaternala fluctuating every year.	Market for Construction 1994
	USA	Operator/ Wholesaler,	Wholesafer.			i ion to coatestiala hoctualing avery year.	Market for Guatemala: USA.
	÷ .						
30							
	Los Angeles, USA	Tour Operator/ Wholesaler.	Tour Operator/ Wholesaler.		USA (mainly) but also from Canada and Mexico,	For Guatemala, major market USA and Canada. Ther market has docrease since Todos Santos evori.	USA (mainly) but also from Cana and Europeans (asking for a che package) and Moxico (mexican honeymooners are accessing to y TO), All of them have acces trou
ł							honeymooners are accesing to the TO). All of them have acces trought internet.
	. *						with the l
1	New York	Tour	Tour Operator/	130	USA, Japanese expatriate (Canada).		Japanese families living in the U
		Operator/ Wholosaler.	Wholesaler.		expairlate (Canada). Japanese companies and lamities of their staft are principal clientele.		oapanese rannies nyng in me U
		· · ·			are principal clientele. Groups of house wives		
					Groups of house wives are guite important for the holiday market.		
2	New York	Τοιν	Your Operator/		· · · ·		
ſ		Operator/ Wholesaler.	Wholesaler for Latin America.				
			ISRAMWORLD subsidiary with worldwide covering.				
13	New York	Tour Operator	Wholesaler		USA	Popularity of Central America is declining	USA
			(Subsidiary of an airline)			(even Costa Rica's popularity was affected by murder cases reports).	- COA
1							· · · · ·
14							
	New York	Tour Operator	Central America in particular Costa Rica		USA	Belize popularity increased in recent years thanks to active promotion	USA
						diving, nature areas and caving.	
					· · · · ·	Destination with beach is easier to sell.	
25	Marte Vark	C-L		l 			
	New York	Columnist	Articles for newspapers about Latinamerican art &			They are now out of business as travel agent. At the beginning they should expand due market wish to combine	USA
		j .	literature. A former travel agent			Copan, Honduras and Arch, Sites in Guatemala	
		1	specialized in Maya Roule.				
36	•						
	Tokyo	Tour Operator	Mexico and Latinamerica		Japanese: 100%	Before Todos Santos Incident, Siyu Ryoko (TO directly involved in the situation) was trying to inkoduce Yaxchilan and Moxican-Guatemala border areas to	Japanese
						Uying to introduce Yaxchilan and Moxican-Guatemala border areas to Japanese market. The incident stronget	
					ļ	Japanese market. The incident stopped (or suspanded) their involvment in Guatemata. Guatemata was withdraw from Japanese TO brochures.	
<u>17</u>	Tokyo	Travel Agency			Janan 4000		
		nates Allerick			Japanese 100%		Japan
		}		-			
ļ					1		
		[:				
39	Tokyo	Travel Agency	 		Japanese 100%		Japan
		1					
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		ł	1	1		1. Sec. 2.	
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 Table 1.9
 Record of Interviews with the International Travel Trade (1)

ength of stay	Seasonality	Principal problems to promote tourism	Strengths of Gvalemala
		Information on Central America as a siky region to travol	Guatemala has abundant tourism
		Information on Central America as a siky region to travel (exception of Costa Rica). Security is a problem in Guatemata : Tikat & Antigua no problem with day tight but unsate at night.	resources and a high potential.
		· .	
anabi al laura 7 10 dana 7 laura ani	·		
enght of tours: 7-10 days. Prices under USD 1,000. (Prices of package tours from USA are more expensive than similar in		Security mallers (american customers are very sensitive to it. They check security aspects via Internet) Low quality of	Guatemala has everything for fourist a business people. Guatemala has a lot treasures. Unique geographic features (variation of altitudo and sconery), milt weather throughout the year (not very
Europedouble . In Spain and France 1,000 -1,500 while In USA \$ 2,000).		gets europeans no americans), fack of comfortable hotet	treasures. Unique geographic features (variation of altitude and scenery), mile
1,000 - 1,500 while in USA \$ 2,000),		Socump makes (anoma al cosciners die Very sensitive to it. They check security aspects val internal) Low quality of customer services al algooits, als service (National Ilag. TACA- gets auropaans no americans), lack of comfortable hold accommodation, local travel agents, restaurants, alc. Speak only spanish-multi-bilinguit requering (all least bilingual); cod sense of arrival at aligoot (in contrast w/ Mexico & Costa Rica).	weather throughout the year (not very and not very hot), Cultural Interest (eth
		sense of arrival at airport (in contrast w/ Mexico & Costa Rica).	and not very hol). Cultural interest (elf culture and handicraits variety). Guatemala has a bright future.
enght of tours: 8 days, Prices under \$USD 1,540 including air fare from MIA or LAX.		Insecurity, tack of Infrastructure,	Tikal and Mayan rulns; People; Handkrafts, Open air indigenous mark
Amerifcan customer takes around 1 week for travet.			Cultural tourism is more important that nature tourism in USA market. Studen
and the Residence of the			market is very cheap.
	· .		· ·
		· · · · · · · · · · · · · · · · · · ·	
enght of tours: 7-10 days. Prices range rom SUSO 1,000 to \$ 1,800 per person.	• •		Guatemala has a blg diversity that can interesting: Archeological sites, Coloni
			interesting: Archeological sites, Coloni towns, Indigenous people and culture handicrafts.
			1
		· · · · ·	
	· .	·	
	·.		
and the second second second			
One week visiting Antigua,			
The vicek visiting Antigua, Dickicastemang, Panajachej & Tikat, Brochures in two parts: a) sugested interaries (interaries (or 10-14 dyas typical or american customars) and b) Region by egion section (iravel components ustomizable for clients). Customata is only lead in the bit reaction, drive terminate			
or american customners) and b) Region by			}
sustemizable for clients). Guatemata is only issued in the b) section due its limited			
demand.	· · ·		
enght of typical itineraries for Central America is 7 to 10 days. Their customers spend 7-8 days in Guatemata visiting Dhohcastenango, Alillán, Antigua & Tikat, I Copan and Honduras are included, the enght would be 10 days. There are not man underse of libers.			Guatemalan's collee and cakes are hi in quality and cannot be missed. SPA
peno 7-8 days in Guatemala visiting Chichicastenango, Atittán, Antigua & Tikal,			also an interesting tourism objective. T can be supplementary tourism attraction
I Copan and Honduras are included, the enght would be 10 days. There are not			
many variations of itinorary.			
central America: 10-14 days, Costa Rica is			
SA market considers air service when			
ravel time exceeds 2 1/2 hours. 4 travel time is acceptable when route is scenic.			
Américan market cares about long bus trips unlike europeans who don't care too			
nuch).			
Americans usually spend 2 weeks in Centri America. 3 weeks is the maximun stay lenght of stay.	There are 3 travel seasons:	Honduras goverment has attempt to hinder tourism flow	·····
enght of stay.	Christmas, Easter and Summer holidays.	between Guatemala & Hondura's tooking for a longer staying at Honduras. Mundo Maya has been challonged by this actions.	
		1	
		l de la companya de l	
	-		
Japanese market spends 1-2 weeks to	······	According with Japanese Ministry of Foreign Affairs, Chinese In	· · · · · · · · · · · · · · · · · · ·
travel in Mexico and Central America.	• •	According with Japanese Ministry of Foreign Alfairs, Chiapas is NOT a recommended destination for tourist (attought problematic area is reduced and San Cristobal de las Casas and Palenque are secure locations). This makes difficult to sale Hundo Mary, Facilitate procedures for vehicles crossing the	
	· · · · ·	and Palenque are secure locations). This makes difficult to sale Mundo Maya. Facilitate procedures for vehicles crossing the	
			1
		boarder is vital for tourism development in the Maya region Scarcity of good Japanese speaking guides is a constrain to soli	
		boarder is will for tourism development in the Maya region. Scarcity of good Japanese speaking guides is a constrain to self Guatamala. (They used mexican guides to cope with this situation).	
unger illinerary is 22 days to Antartica.		Scarcer is wai for tourism development in the Maya region Scarcity of good Japanese speaking guides is a constrain to sell Guatamata. (They used mexican guides to cope with this	
Longer illnerary is 22 days to Antartica. Tour libneraries longer than 13 days are difficult to sell. 8 days tous are very		Scarcer is wai for tourism development in the Maya region Scarcity of good Japanese speaking guides is a constrain to sell Guatamata. (They used mexican guides to cope with this	
conger illnerary is 22 days to Antartica. Four lineraries longer than 13 days are fifficul to sail. 8 days tous are very sourdar. Recently 10 days tous are nereasing popularity. They offer 9 days tour Conservery offer 9 days tour		Scarcer is wai for tourism development in the Maya region Scarcity of good Japanese speaking guides is a constrain to sell Guatamata. (They used mexican guides to cope with this	
dincult to sell. 8 days toors are very popular. Recently 10 days tours are increasing popularity. They offer 9 days tour to Guatemaa only, and 12 days tours		Scarcer is wai for tourism development in the Maya region Scarcity of good Japanese speaking guides is a constrain to sell Guatamata. (They used mexican guides to cope with this	
unicult to sell. & days tools are very opplar. Recently 10 days tours are increasing popularity. They offer 9 days tour to Guatemala only, and 12 days tours combining Guatemala, Honduras, El Salvador and Beitze. They don't offer linerarits combining Mexico and		Scarcer is wai for tourism development in the Maya region Scarcity of good Japanese speaking guides is a constrain to sell Guatamata. (They used mexican guides to cope with this	
dincult to sell. 8 days toors are very popular. Recently 10 days tours are increasing popularity. They offer 9 days tour to Guatemaa only, and 12 days tours		Scarcer is wai for tourism development in the Maya region Scarcity of good Japanese speaking guides is a constrain to sell Guatamata. (They used mexican guides to cope with this	
unicult to sell. & days tools are very opplar. Recently 10 days tours are increasing popularity. They offer 9 days tour to Guatemala only, and 12 days tours combining Guatemala, Honduras, El Salvador and Beitze. They don't offer linerarits combining Mexico and		Scarcer is wai for tourism development in the Maya region Scarcity of good Japanese speaking guides is a constrain to sell Guatamata. (They used mexican guides to cope with this	
Dinicult to sell. 6 days touts are very popular. Recently 10 days touts and increasing popularity. They offer 9 days tour to Guatemala, Honduras, El Salvador and Belize. They don't offer linearies combining Mexico and Guatemala.		Scarcer is wai for tourism development in the Maya region Scarcity of good Japanese speaking guides is a constrain to sell Guatamata. (They used mexican guides to cope with this	
Unicult to sell. 6 days tours are very popular. Recently 10 days tours an increasing popularity. They offer 9 days tour to Guatemala only, and 12 days tours combining Guatemala. Honduras, El Salvador and Beitzo. They don't offer lineraries combining Mexico and Guatemala.		Scarcer is wai for tourism development in the Maya region Scarcity of good Japanese speaking guides is a constrain to sell Guatamata. (They used mexican guides to cope with this	
Unicult to sell. 6 days tours are very popular. Recently 10 days tours an increasing popularity. They offer 9 days tour to Guatemala only, and 12 days tours combining Guatemala. Honduras, El Salvador and Beitzo. They don't offer lineraries combining Mexico and Guatemala.		Scarcer is wai for tourism development in the Maya region Scarcity of good Japanese speaking guides is a constrain to sell Guatamata. (They used mexican guides to cope with this	
Dincult to sell. 6 days touts are very popular. Recently 10 days tours are ncreasing popularly. They offer 9 days tour to Guatemala, Honduras, El Salvador and Beitze. They don't offer linearities combining Mexico and Guatemala. Longel litherary is 22 days to Antartica. Tour linearities longer than 13 days are difficult to sell. 6 days tours are very popular. Recently 10 days tours are popular. Recently 10 days tours are combining Gratemana.		Scarcer is wai for tourism development in the Maya region Scarcity of good Japanese speaking guides is a constrain to sell Guatamata. (They used mexican guides to cope with this	
Dincult to sell. 6 days touts are very popular. Recently 10 days tours are increasing popularly. They offer 9 days tours combining Guatemala, Honduras, El Salvador and Belize. They don't offer lineraries combining Mexico and Guatemala. Longet litherary is 22 days to Antartica. Tour liberaries longer than 13 days are difficult to sell. 6 days tours are very popular. Recently 10 days tours are popular. Recently 10 days tours are combining Guatemala, Honduras, El Salvador and Belize. They don't offer timeraries combining Mexico and		Scarcer is wai for tourism development in the Maya region Scarcity of good Japanese speaking guides is a constrain to sell Guatamata. (They used mexican guides to cope with this	
Dincult to sell. 6 days touts are very popular. Recently 10 days tours are ncreasing popularly. They offer 9 days tour to Guatemala, Honduras, El Salvador and Beitze. They don't offer linearities combining Mexico and Guatemala. Longel litherary is 22 days to Antartica. Tour linearities longer than 13 days are difficult to sell. 6 days tours are very popular. Recently 10 days tours are popular. Recently 10 days tours are combining Gratemana.		Scarcer is wai for tourism development in the Maya region Scarcity of good Japanese speaking guides is a constrain to sell Guatamata. (They used mexican guides to cope with this	

Table 1.4	Record of Interviews with the	
	The seal busices and the search of the search	

-	Dallas-Fort	Tour Operator	Security issues	Furner 60% atinamarica: 90% They and early an to Outbourde W
	Worth, USA.	Wholesaler.	internity inserves	Europe: 60%; Latinamerica: 20%. They sold package to Guatemala till 1996. They stopped duo his new business stratogy (just wholssalo of air lickets. They night go back to packages). Rark in sales are: 1) Costa Rica; 2) Guatemala (2-9 thousand customers por year).
28				
	Los Angeles, USA	Tour Operator/ Whotesaler,	INGUAT and TACA seems ignorant of americon market. They seem to be satisfied just with european market.	vacations & business: corporate (90% of the products). Educational. Major areas: Maxico, Central Amarica, Guatemala share in products; 20%.
9		.		
ł.	Los Angeles, USA	Tour Operator/ Wholesaler.	insecurity, tack of infrastructure; no compatitive four package price (To Gaulanita's 600 (mostly shared by arifare). Costa Rica (5.440 (rom LAX, \$.300 (rom NY). Transportation: need to hire local drivers; Car rental rot recommended. Individual travel is very difficult in Guatemala (poor transportation services). Lack of promotion (compare with Mexico and Costa Rica).	Brazil, Peru, Argentina, Costa Rica, Ecuattor, Chile, Botize. Favorable destinations are Costa Rica: 90% in Control America) Chile. Belore travel Gualemala USA market would travel to Belize, Panama, Hondura: and then Gualemala.
30	Los Angeles,	Tour		
	USA	Operator/ Wholesater,	Major offer is cultural which seems to be very weak segment at the present. Poor service level in Guatemala (amoricans require standard services). They can complain of services). Little positive reinforcemonds. Little positive reinforcemond of Guatemala as a good destination. Too slow reacting to negative factors. TACA sells unroasonable high price all tickets.	Central America, South America, Guatemata share in TO produce (10% or less). Mostly SSS interest. Small market for nature and cultural destinations (incluting archeological; in this field Egypt is a main competitor). Mundo Maya ancheological; sites are too disperse and similar to travel on the route. Considering size of USA market, a good marketing strategy can expand this segment.
31				
	New York	Tour Operator/ Wholosaler,		Business, incentive and holiday tips in and out USA. Packages of the Look brand for the leganese market. For Guatemala there are 2 different intratinis: IJ USA-Guatemata; Guatemala: Antigua Guatemala; Guatemala-Flores-Tikat-Flores-Guatemata; Guatemala; USA; Guatemala; Guatemala-Antigua Guatemata; Guatemata; Flores- Guatemata; Guatemata-Antigua Guatemata; Guatemata; Flores- Guatemata; Guatemata-Coban; Coban; Guirgua Guatemata; Guatemata; Guatemata; Guatemata-Coban; Coban; Guirgua Guatemata; Guatemata; Guatemata; Guatemata-Coban; Coban; Guirgua Guatemata; Guatemata; USA. In Laivangneira; Rizzarii is the most condiar. The remover
				USA. In Latinamerica, Brazil is the most popular. The company ontroduced a bus/rail tip of Cooper Canyon 8 days. According with this, it seems that they prefer to stay in Guatemala city.
32	New York	Tour Operator/ Wholesater,	Guatemala has infrastructure but does not have the demand (while Costa Rica does not have infrastructure and has demand), Guatemala is not consumer driven,	Antigua, Chichicastenango, Panajachel & Tikal. Brochures in two parts: a) sugested litnerartea, and b) Region by region section (travel components customizable for clients). Guatemata is conty listed in the b) section due is fimiliad demand. Guatemata is an independent destination
				rather than a destination to be combined with other destinations. They are aware of Mundo Maya but trips are made for its northern part (Yucatan) and its southern part (Guatemata) separately.
3	New York	Tour Operator	Guatemala tourism image is not favorable. It	Worldwide package tours (air fare operated by United). At Latin America
	-		atracts only a narrow market, Guatemata is nor rogarded as a secure destination.	and Greece Division of this company, Mexico and Greece are the most popular destinations). Guatemala share's is less than 1% and it is combined sometimes with costa Rica. They don't sell Cancun because UA does not operate flights to that destination.
34	New York	Tour Operator		In Control America, Cont. Direct. 2
				In Centgral America, Costa Rixa is bast selling destination. Belize come: 2nd and Gustamala 3th. Belize popularity incessed in recont years thanks to active promotion achinites. It provides beaches, scuba diving, nature areas and caving. Destination with beach is easier to sell. Typical fibrorary in Guatemala is 7 days (Antigua 2N; Chichic TN; Ablián 2N; Tikal 1N).
35	New York	Columnist		"Maya" is the most important laurement to the 110 to the
				Maya' is the most important fourism concept in the US both for Guatemala & honduras. Colonial is only supplementary to archeological fourism. Arts & handicrafts in Guatemala have a high quality and important for tourism as well.
36	Tokyo	Tour Operator	· · · · · ·	
	1			Maya World. Bus tour is a common and preferred transportation to visit archeological sites, at least, in Mexico.
	1			
37			Market State	
	Токуо	Travel Agency	constrain oir Guatemata, Good English- speaking guide is much better than occor	They have a travel membership system (300,000 customers in 2000). Europe is the best sale destination region but they always include worldwide destinations in their brochures (sended periodically to them) to
			japanese speaking guide. In contrast there are good japanese speaking guides in Mexico. At this moment, Japanese Foreign Affair's Security Recommendations mean a	keep clientele satisfied and part of the system.
			products to the Northern part of Guatemala.	
20	Tabua			
وو	Tokyo	Travel Agency	Lack of good japanese-speaking guides is a constrain of: Guatemala. Good English- speaking guide is much better than goor japanese-speaking guide. In contrast there are gooi Japanese-speaking guides in Mexico. At this moment, Japanese Foreign Affair's Security Recommendations mean a great constrain to introduce competitive	They bave a lravel membership system (300,000 customers in 2000). Europe is the best sate destination region but they always include worldwide destinations in their brochures (sended periodically to them) to keep clientele satisfied and part of the system.
	1		products to the Northern part of Guatemata.	
	l			

sychographics characteristics	Potential tourism affractions	Infrastructure necessities	Legal requirments improve tourism
ompared with other Central America countries, notable group vel by this markst. (Costa Rica has a very clean & safe nage where women can travel toaltought kidnapping incident I Nicaragua bearder).	Costa Rica has beaches but Americans den't stay long there. Combine activities with nature, Americans protor Caribbean il they want beachos. Americans are looking for different destinations, it security problems can overcome, Guatemala would rocelve potential travelers (specially those who have been atroady in Costa Rica).	(au)	3819989300000000000000000000000000000000
Suples. Prices under \$USD 1,000. American customers prefer		Mexico and Costa Rica Invest noney for infrastructure and marketing. Guatemalan activities are hardly seen.	
he most active ages, occupations: average 40 yo and older. hey travel individualy. USA costumer chose among principal estinations being their chockes: First J Cost Alica or Panama Moxico: Socond) Chille & Argentina; third) Gualemala. Costa ic & Mexico are dom'ranar (than Guatemala) in Central metrica tourism cause their promotional activity. Prefer security political and crimat ambiance and comfort. If there are cidents they cancel, Very conservative (quism), Europens	Market genetal orionitation: Culture, Archaeology, history and nature. Guatemala has a to to offer: First) Archeological mainly (Tikal the best), Second) Indigenous people; Third) Handscraft (the company promotes hand weavers groups).		
Note adventurous. Americans pay money for good services in ccommodation & transportation. Prefer american hotel chains ion't like typical local food. Shopping is a must for them. They on't Cate Abut quality like barden de month. Millare lourier.			
he most active ages, occupations; mitche age, According with ustomer they travel individually on in groups (2-3 persons por roup). Big tour group has not been succesfull in Guatemata, mericans contortability oriented; Europeans have a more diventure orientation (more) within th producations than	Favorable destinations and so tar: Costa Rica, Deliza, Guaterniata is promoted but not easy product to sell, Quaternala is solid in USA market but not. In a top position. Central America is like a provincial destination in tourism.	Insulficient road condition.	:
mericans). Americans wants a Socure travel and don't want to se money or time. Baby boomer usually plans 2-3 vacation a ear. New X generation is culture oriented. They tike driving by er own in toxign countries (Costa Rics has a good condition x his and recognized as a 'sale destination'). Many refigious ar visiting Gustemate in Holy Week and Christmas ocessions (reservations one year in advance).			
ha Intervivee personality prefer small-scale luxury hotels. An sportant aspect of fuxury is the number of employees at an stabilisment, Luxury hotels in Asla empoys a large number of calls people who are assigned to small specific jobs, wich is uccestuity translated into 'good' services. He doesn't know this pe of hotels in Latinarmerica.			· · · · · · · · · · · · · · · · · · ·
	They know there are flights between Palenque and Flores. They cont know, howaver, local tour operators who can operate the trip.		
heir customers spend 7-8 days in Guaternala visiting hitchicastenango, Attitán, Anigua & Tikal, II Copan and londuras are included, the tenght would be 10 days. There are of many variations of itinerary. Although already aware of lundo Maya concept. Guaternala is rather an independent estimation for USA market.	Relied people spend longer time (even more than 2 weeks) for trips than average Americans. They travel during of season. They will increase their importance in the future with retirement of baby boomers. If Guatemala wants to sell Mundo Maya this is the markel to approach. Selling the typical tilnerary has priority over diversifying its tourism product, alt least, in the USA market.		
	To concine Tikal with Palenque would be interesting. The problem is to know how arrangements can be done (they work with PTA Maya and Cark Tours in Guatemata). SPA is an important objective in the USA market due consumers interest in hoalth. Guatemala may have opportunity in this market.	Hotels in Guaternala are better than those of San José.	
	Cancum-Tikat packages may be quite appealing to the Japanese boneymooner market. Cancun popularity has grown significantly in recent years due to his air fare and "temate office workers" markat which is replacing honeymooner-, could be very attactive. Mexico Kankou is making efforts among Japanese market to introdrue Playa del Carmen which is a beach destination close to Guatemala (and should take advantage of II). Visiting World Heritage sites (WHS) is a fashion in Japan. Guatemata has a good polential for growth in this context (as an example: Continential Atlines introduced a promotion campaign of Merico focusion on its WHS with a year nositive immati).		
ocus on corporate market and large scale taitor made group surs. Since market stagnation early 1980's, fley are actively articipating in the growing tou packages market (first: westing in exempaper acts for inexpensive tours; later, ganizing participants into membership system to make them spetitive clientiel for not so expensive tours. Customers are copie over 50 yo. More than 50% of male customers and 30% I temales, have a job.	Compared with Costa Rica, Gualemata has more mass-market appeal. Costa Rica is for nature lovers and SIT markets. Those who are repeal visitors to a destination, prefer to travel only within a country or an area intensively, rather than combining with other countles or areas. Traveling for 45 hours by bus is a coeptable, provided that scenery is good. Thous trip may be tolerable but they generally avoid such a trip (avafability of clean toffels is crucial to use a bus). They look for rooms wprivate baths as best as they can. Rooms without private shower may be tolerated for one night or two. Japanese Foreign Affair's Security Recommendations mean a great constrain to introduce Palenque-Tikal which may be a very competitive product.		:
ocus on corporate market and large scala tailor made group	Compared with Costa Rica, Guatemata has more mass-market appeal, Costa Rica Is for nature lovers and SIT markets. Those who are repeat		· <u>·</u>

c	Location	able 1.4	Hecord (Financial supports required	Of Interviews Ituman resources development	With the Inte Participation in conservation efforts	ernational Travel Trade (3)	Tourism images and advertisement concepts
	Dallas-Fort Worth, USA.	Tour Operator Wholesater.					
				ľ			
28	Lūs Angelės, USA	Tour Operator/		Need for education on		Proximity to INGUAT; Open dialog with INGUAT and travel agencies.	Promotion activilles of INGUAT should be
		Operator/ Wholeseter.		customer services.			improved. An idea his to hire foreign advisers.
29	Los Angeles,	Tour		· · ·		INGUAT Should change the way it is	Touton impos of Output in the second
	USA	Operator/ Wholesaler.				INGUAT should change the way h is promoting Guaternala. Well planned and participation in trade shows are highly recommerided. Also very recommended a	Tourism image of Gualemala is currently a part of Mexico. Central America Image h already been confirmed (Mexico and Cost Rica are in the top). Belize has become
						regular contact with agents (even trought post cards) at the beggining and preparation of a full data catalog in the	popular. They give a very positive image among USA market. They recovered tourism inflow soon to spite of Milch
				1		inext step.	Hurricane.
30	Los Angeles, USA	Tour Operator/		INGUAT should encourage lourism		Too concentrated in traditional resources.	Cultural tourism. INGUAT don't know
		Wholesaler.		education.		Little has changed in 11 years they have been selling Gualemala. Slow INGUAT reactions toward Travel Agents. Flexibility in bus transport Insufficient. 5 years ago,	marketing and promotion (improvment of money allocation). More active contact will travel agents. Guatemala needs direct promotion to consumers. They always wal
				· .		Guatemala and Belize were bound logelher. They are split now. Belize is popular cause tropical Caribbean style.	internet and remember bad images. It is very difficult to remove them from memory Worlwide promotion.
			:	ł			
31	New York	Tour Operator/		ł			Guatemala has an Image of dangerous or adventurous country. His personal images Latin America countries is negative in
		Wholesaler.					Latin America countries is negative in general (seem to be influenced by his perception of immigrants workers in NY.
32	New York	Tour			<u>.</u>	in the past, Guatemala's popularity	
		Operator/ Wholesater.				started to growth. Negative publicity came	
						negative publicity has been taken place. This is a right time for Guatemata to launch a campaign to firmly establish tiself as a tourism destination,	
33	New York	Tour Operator					
	NEW TOIK	rour Operator				Costa Rica invested in tourism promotion. This action secured his current market position as an ecolourism destination.	Gualemala tourism Image is not favorable, altracts only a narrow market. Gualemala should make efforts to remove its tourism
			-				image of dangerous destination.
34	New York	Tana					
	New TOIK	Tour Operator		• •		Belize popularity increased thanks to active promotion activities. It provides beaches, scuba diving, nature areas and	Guatemala has plenty of tourism promotion materials such as CD/HOM and brochures It is better compared with other countries of the better countries of the better countries of the better c
	1					caving. Destinations with beach is easier to sell.	the region. It would be ideal if Gualemala provides human services as addition to malerials.
35	New York	Columnist					
	New YOCK	Columnist				It is important to register a name in the Yellow Pages because it is easy for customers to know what is the product	Latin America countries rarely produce goo brochures. Guatemala is an exception and slightly better in Rivs sense. The interviewe hopes to open a museum in NY to introduc
						about. The "Maya" name is very important. The same goes for internet. INGUAT's current URL is note very easy to memorize.	Cultures and arts of Mundo Maya. It would also strengthen the cultural identity of thos
36						to memorize.	who have ancestry in the region, but also function 8 improve regional image and promote tourism.
30	Tekyo	Tour Operator		-		Fam trips are useful to remove "dangerous country" images from	Mundo Maya countries should consider launching a joint tourism promotion
					-	Japanese tour operators and travel agents, in particular, after Todos Santos incident. Staffs enthusiasm of	Campaign in Japan,
						Guatemala officials are important to create a favorable image of the uestination (Cuba is guile successful with the staffic anthusian endowed and the successful with	· · · ·
37	Tokyo	Travel Agency	· · · ·			his staff's enthusiasm and it shows how nourism promotion artikities includion	
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39	Tokyo	Travel Agency				ļ	
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Table 1.4 Record of Interviews with the International Travel Trade (3)

Negalive feedbacks from customers	Requests to INCUAT and the government
	Security preconception should be overcome with familips (not only TO but also Travel agents and Magazine writers).
·	INGUAT has no contact with travet agencies. They need a lot of things tree
	INGUAT. INGUAT should be interested in "ethnic" travel agencies, but also contact non hispanic oriented travel agencies. Travel Agencies don't know
н 1	how to contact INGUAT (he has customers who have interest on textites).
1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 -	
· .	Promotion materials (small blings to give away in tourism promotion). Participate in trade shows, Airlines collaboration. Promotional alifares to
	Guatemata. Brochures distributed by HogdAT are beauliful but this is insufficient to promote (not so effective). INGUAT needs more interaction w
	TO, Local participation with agencies. Promotion by Internet is cheap but effective.
· .	
Inflexible bus transportation schedules	Develop more sun and sand destinations. Increase materials for promotion
insufficient road condition. Guatematar Tour Operators are very slow reacting	cultural tourism (Tikal and Chichicastenango are important). Participation in
In their actions (by example: Gualemalan TO offer products two months in advance. Market make	additional souvenir a plus). Constant cromotional activity is more
reservation 6 or 7 months earlier). They don't know about services; bad	recommendable Ihan big lrade show participation. Alhough INGUAT was very active in our business, few year ago, started more promotion to retait market (TO business tost interest). Increase mutual cooperation in marketin
allitudes, drunk-driving in the morning. Local people have a very simple mind.	
	· · · · · · · · · · · · · · · · · · ·
· · · · · ·	This is a right time for Guatemala to launch a campaign to lirmity establish liself as a tourism destination. What is needed are publicity and
	advertisement loward consumers (not the seminars for the travel trade).
Complains are very rare: hotels are good in general.	Guatemala has to express government commitment for fourism developme
	Otherwise, the travel trade, including holes and lour operators won't run th risk of investing in, and sending tourist to, the country.
······································	INGUAT should place more emphasis on "soft" aspects of tourism promotic
	trade. It is recommendable to install bibloards advertisement rather than travel
· · ·	in travel trade magazines.
<u> </u>	Addetes in New York Times Soublettended Transfer Conde Next Transfer
	Articles in New York Times, Sophisticated Traveler, Conde Nest Traveler have great influence in people, particularly affluent professionals, to choose destination to travel. Guatemala should establish a public relation office to
	promote positive media coverage. This office should have US-educated professional staff.
Holels In Guatemala are good an there	Travel trade lacks of Information of Guatemala. Tour Operators and Travel
Is little problem on this.	agents that sells collatemala and the Mundo Maya region, were welcoming itourism seminar beld in Tokyo In May 16, it may be possible to charge an
	remaineries in a is combined with a small concert of traditional music like
	maximba. It is important to conduct fourism promotion activities not only in Tokyo but also an major cities the Ocean and Manager
e Anna an Agentin Anna an Agentin	marimba. It is important to conduct tourism promotion activities not only in Tokyo but also en major cities like Osaka and Nagoya.
	Tokýo buťalso en major cites like Osaka and Nagoya.
	Tokyo but also en major cites like Osaka and Nagoya. R is important for Guatemala Embassy to claim Ministry of Foreign Alfairs to remove or modify its security recommendations to comok with more accura
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	R Is important for Guatemala Embassy to claim Ministry of Foreign Alfairs to remove or modify its security recommendations to comply with more accura security conditions in Guatemala.
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	It is important for Guatemata Embassy to claim Ministry of Foreign Affairs to remove or modify its security recommendations to comply with more accura security conditions in Guatemata.

1.3. Supplementary Natural Environmental Survey

1.3.1. Objectives

The objective of the Supplementary Natural Environmental Survey is to understand present natural environmental conditions and characteristics of the Priority Tourism Development Areas for the Study of National Tourism Development for the Republic of Guatemala.

1.3.2. Survey Areas

The Survey Area covers the following three areas and their surroundings:

- · Sayaxche municipality in the Peten Department;
- Coban municipality in the Alta Verapaz Department; and
- · Zunil municipality in the Quezaltenango Department.

1.3.3. Contents of the Survey

(1) Water sampling and analyses

a. Sampling point

Water sampling was conducted at 12 sampling points in major rivers and lakes within the survey area.

b. Analysis parameters

The analyses items complied with Guatemala's present standard water quality survey parameters. The following seven parameters were analyzed at each sampling point: water temperature, pH, SS, Conductivity, DO, COD, and BOD.

Sampling and analyses methods were based on the sampling/analyses standards in Guatemala.

(2) Preparation of soil erosion/landslide prone area map

A slope and potential soil erosion map was prepared for each survey area in order to understand the risk of soil erosion and landslide in the Priority Tourism Development Areas. Based on existing present data and information as well as field reconnaissance by local geology specialists, thematic maps were prepared for respective survey sites.

(3) Preparation of forest cover and deforestation area map

An alteration land use map was prepared for respective survey areas in order to understand recent land use changes and deforestation situations in the Priority Tourism Development Areas. Each thematic map was prepared based on the existing data and information obtained from recent aerial photos and field reconnaissance,

(4) Preparation of endangered and valuable plants distribution map

A native vegetation map was prepared for respective survey areas in order to identify the native flora distribution based on existing data and information as well as those obtained from field reconnaissance by local botanists.

(5) Preparation of endangered/valuable mammals habitat area map

A wildlife distribution map was prepared for respective survey areas in order to identify wildlife dense habitat areas. Each thematic map was prepared based on existing data and information as well as those obtained from field reconnaissance by local zoologists.

1.3.4. Main Outputs and Uses of the Survey Results for the JICA Study

The main output was the Report of Supplementary Natural Environmental Survey, which includes the above-mentioned thematic maps. The survey results could be used for identifying the areas, which have tourism development potentials and constraints from natural environmental aspects. The survey results also contributed to the understandings of the nature tourism resources conditions in the Priority Tourism Development Areas and provided basic data for the environmental impact assessment survey.