



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



Study of National Tourism Development for the Republic of Guatemala

Final Report
Volume 4: Technical Documents



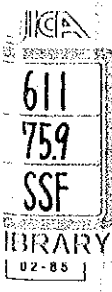
JICA

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Volume 4: Technical Documents

May 2002



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Pacific Consultants International

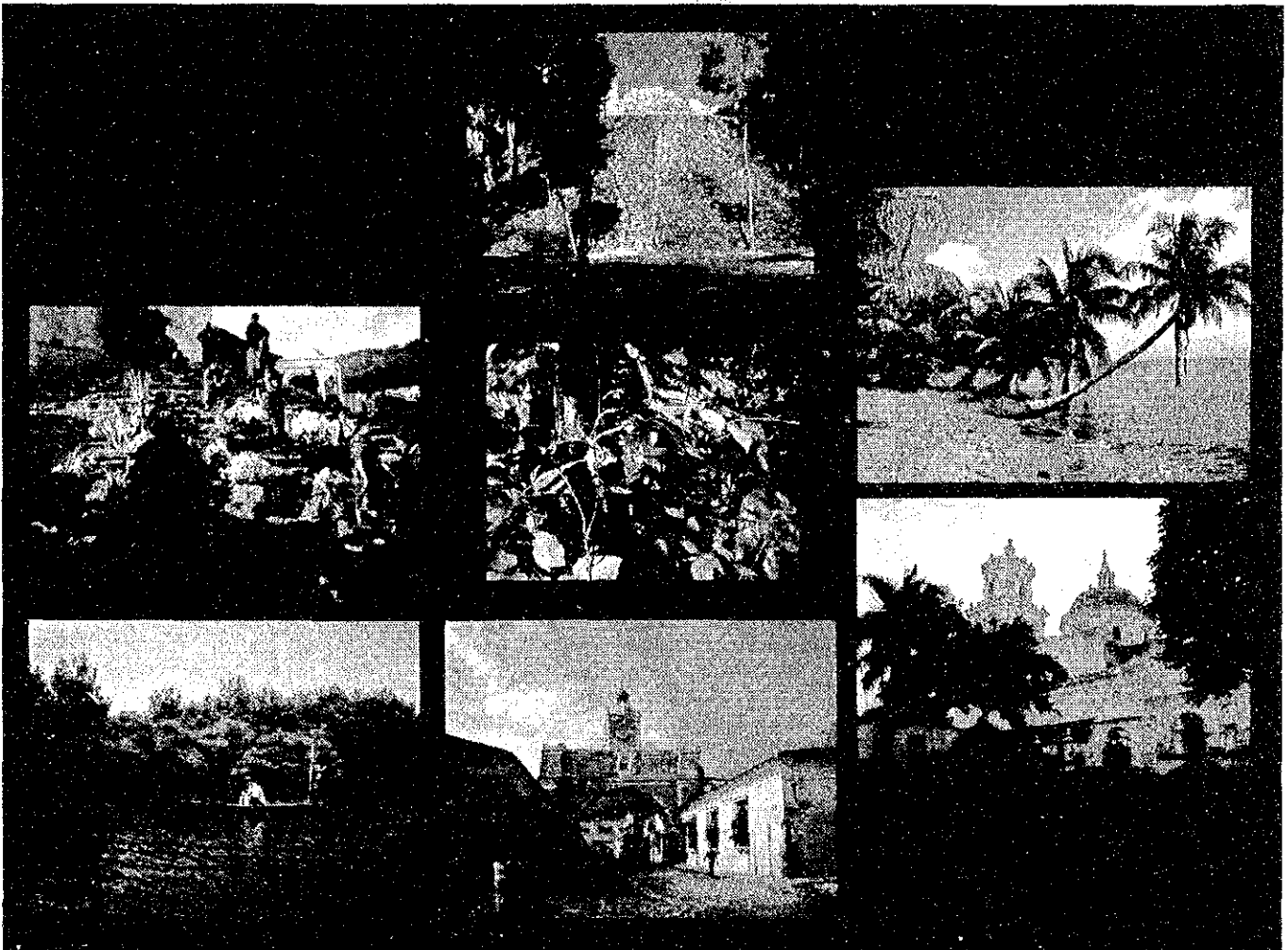


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The following exchange rate is applied in the Study:

US\$1 = Quetzal 8 = Yen 121

Preface

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

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

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

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

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

May 2002



Takao Kawakami
President
Japan International Cooperation Agency

May 2002

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

Letter of Transmittal

Dear Sir,

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

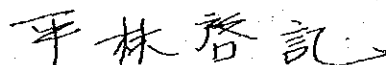
This report compiles the results of the Study, which was undertaken in the Republic of Guatemala from January 2000 through March 2002 by the Study Team represented by Pacific Consultants International.

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

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

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

Very truly yours,



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

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

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 PTDA's:

- 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	Mejchor 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)
Others	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

Table 1.1 Questionnaire for the visitor survey

<p>DEAR VISITOR: Good morning/afternoon. My name is _____ and I work for Generis Latina, a market research company well known here in Guatemala and Central America. In order to improve the tourist product, the Guatemalan Tourist Commission is studying the needs and opinions of the tourists who visit to Guatemala. We appreciate your help by answering this questionnaire. It won't take long. THANK YOU.</p>		
<p>QUESTIONNAIRE</p>		
1.	How many times have you visited Guatemala including this visit? <i>PLEASE COMPLETE.</i>	_____ times
2.	What was do main purpose of your visit to Guatemala? <i>CIRCLE ONLY ONE PLEASE</i> <i>IF YOU CHOOSE ITEM 2 TO 7 PLEASE PROCEED TO QUESTION 7</i>	<ol style="list-style-type: none"> 1. Holiday <i>Go to Q 3</i> 2. Visit friends and relatives <i>Go to Q 7</i> 3. Learning Spanish <i>Go to Q 7</i> 4. Meeting, Incentive travel, conference, and event <i>Go to Q 7</i> 5. Business/trade <i>Go to Q 7</i> 6. Employment/work <i>Go to Q 7</i> 7. Others (please specify) _____ <i>Go to Q 7</i>
3.	What influenced you to make the decision to visit Guatemala? <i>PLEASE CHOOSE ALL THAT APPLY.</i> 	<ol style="list-style-type: none"> 1. Experiences of former visits 2. Travel agent's suggestion 3. Brochures 4. Advertisement in TV 5. Advertisement in magazines and newspapers 6. Magazine and newspaper articles 7. TV programs and movies 8. Friends and family 9. Guatemalan tourist office 10. Internet 98. Others (please specify) _____
4.	You might have considered other destinations before you finally chose Guatemala. What was the most prospective destination next to Guatemala? <i>PLEASE COMPLETE</i>	_____
5.	What was the most important reason for choosing Guatemala? <i>CIRCLE ONLY ONE PLEASE</i>	<ol style="list-style-type: none"> 1. Lower price 2. Shorter travel time 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 important? <i>CIRCLE ONLY ONE PLEASE</i>	<ol style="list-style-type: none"> 1. Archaeological sites 2. Colonial cities and architecture 3. Living indigenous cultures 4. Nature and wild life 5. Beach 6. Spa 7. Museums 8. Shopping 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? <i>PLEASE CHOOSE ALL THAT APPLY</i>	<ol style="list-style-type: none"> 1. Visited archaeological site (s) 2. Visited colonial city (s) and architecture 3. Visited indigenous marketplace (s) 4. Visited nature areas 5. Enjoyed a stay at beach 6. Enjoyed a stay at spa resort (s) 7. Visited museum (s) 8. Shopped for handicraft (s) 9. 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? <i>PLEASE CIRCLE ONLY ONE</i>	<ol style="list-style-type: none"> 1. Used package tour from your country of residence to Guatemala 2. Used package tour (s) purchased in Guatemala 3. Used package tour (s) purchased in a neighboring country of Guatemala (Mexico, Belize, Honduras, El Salvador) 4. Did not use package tour
9.	Who is your travel companion? <i>PLEASE CHOOSE ALL THAT APPLY.</i>	<ol style="list-style-type: none"> 1. Alone 2. Spouse 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) _____

10.	How long is your whole itinerary including the nights spent outside of Guatemala? PLEASE COMPLETE	_____ Night (s)																														
11.	How many nights did you spend in Guatemala? PLEASE COMPLETE	_____ Night (s)																														
12.	What cities did you stay at in Guatemala according to the order of your itinerary? PLEASE COMPLETE ↓	13.	How many nights did you stay in each place according of the type of accommodation used? FOR EXAMPLE IF YOU SLEPT IN PETEN 5 NIGHTS AND STAYED 4 NIGHTS AT A HOTEL AND ONE NIGHT CAMPING, YOUR ANSWER SHOULD BE (See example):																													
	P. 12 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 stay	P. 13 Others (pls. Specify)																								
	Peten	4				1																										
14.	What are your combined destinations with Guatemala? PLEASE CHOOSE ALL THAT APPLY	<ol style="list-style-type: none"> 1. None (Guatemala only) 2. Mexico 3. Belize 4. Honduras 5. El Salvador 6. Other countries in Central America 7. Countries in the Caribbean 8. USA 9. Canada 10. Countries in South America 98. Others (please specify _____) 																														
15.	What is your entry point to Guatemala? PLEASE CIRCLE ONLY ONE	<ol style="list-style-type: none"> 1. Aurora International Airport 2. Flores Airport 3. Puerto Barrios 4. Livingston 5. Santo Tomás de Castilla 6. Puerto Quetzal 7. Valle Nuevo 8. Pedro de Alvarado 9. San Cristóbal 			<ol style="list-style-type: none"> 10. Nueva Anguiatú 11. Agua Caliente 12. El Florido 13. El Cinchado 14. Tecún Umán 15. El Carmen 16. El Naranjo 17. Bethel 18. Melchor de Mencos 																											
16.	How much have you spent for the whole trip including the expenditures you made outside of Guatemala, please include the air fare, tour package fare and hotels? PLEASE USE DOLLARS FOR YOUR ANSWER AND INDICATE THE NUMBER OF PERSONS	US \$ _____				# _____ persons																										
17.	While in Guatemala, how much did you spend? PLEASE USE DOLLARS FOR YOUR ANSWER AND INDICATE THE NUMBER OF PERSONS	US \$ _____				# _____ persons																										
18.	Could you give us an indication on how much you have spent in Guatemala for the following purposes?	<table style="width:100%; border-collapse: collapse;"> <tr> <td style="width:60%;">Accommodation</td> <td style="width:10%;">(</td> <td style="width:10%;">)%</td> <td style="width:10%;"></td> </tr> <tr> <td>Food and beverage</td> <td>(</td> <td>)%</td> <td></td> </tr> <tr> <td>Transportation</td> <td>(</td> <td>)%</td> <td></td> </tr> <tr> <td>Shopping</td> <td>(</td> <td>)%</td> <td></td> </tr> <tr> <td>Entertainment and entrance fees</td> <td>(</td> <td>)%</td> <td></td> </tr> <tr> <td>Others</td> <td>(</td> <td>)%</td> <td></td> </tr> </table>							Accommodation	()%		Food and beverage	()%		Transportation	()%		Shopping	()%		Entertainment and entrance fees	()%		Others	()%	
Accommodation	()%																														
Food and beverage	()%																														
Transportation	()%																														
Shopping	()%																														
Entertainment and entrance fees	()%																														
Others	()%																														
19.	How do you rate the adequacy of the following issues regarding Guatemalan Tourism? IF YOU CIRCLE NUMBER 1 MEANS THAT THE ISSUE DOESN'T NEED IMPROVEMENT, BUT IF YOU CHOSE 4, IT NEEDS STRONG IMPROVEMENT. PLEASE CIRCLE ONLY ONE OPTION FOR EACH ISSUE. REMEMBER YOU HAVE 4 OPTIONS TO CHOOSE																															
		No need for improvement	Some need for improvement	Needs improvement	Strong need for improvement																											
	1. Security	1	2	3	4																											
	2. Manners of street vendors	1	2	3	4																											
	3. Availability of entertainment & night activities	1	2	3	4																											
	4. Availability of good guides	1	2	3	4																											
	5. Availability of good food and restaurants	1	2	3	4																											
	6. Availability of good hotels	1	2	3	4																											
	7. Chances to experience rural community life	1	2	3	4																											
	8. Availability of attractive shopping items	1	2	3	4																											
	9. Environmental protection	1	2	3	4																											
	10. Tourist information	1	2	3	4																											
	11. Reliability and quality of tour operators	1	2	3	4																											
	12. Taxi service an public transport	1	2	3	4																											

20.	How Interested would you be in visiting Guatemala again? <i>CIRCLE ONLY ONE PLEASE</i>	1. Not interested in visiting Guatemala again. 2. Interested in visiting Guatemala again.
<i>IF YOU CHOSE ITEM 2 CONTINUE, IF NOT GO ON TO Q 22</i>		
21.	Which area would you like to visit again, in particular?	_____
22.	What aspects of you staying in Guatemala did you <u>not</u> like?	_____
23.	If you could decide on the type of tourism project that would enhance Guatemala's tourism attractiveness, which of the following projects would you choose?	1. Life museum (a concept to facilitate tourists visit and stay in indigenous community to experience and learn their cultures) 2. Design and quality improvement of handicraft 3. Canopy walkway (hanging walkway over forest to observe tree canopy) 4. Lodges and facilities for wildlife observation (quetzal etc) 5. River cruise that visits archaeological sites and nature areas on the way. 6. Restoration and visitor facility development at archaeological sites. 7. Agro-tourism that would enable tourists to stay in farm, and experience rural ways of life 8. Seaside beach resort development. 9. Lakeside resort development (Lake Isabal, Peten Itza, etc.) 10. Spa resort development in highland. 11. Tourism improvement of historical cities/towns (beautification, galleries, souvenir shops, creation or gathering space, etc.) 12. Development improvement of access roads to tourism sites. 13. Rail Journey in steam locomotive. 14. Signs and interpretation boards at tourism sites
PROFILE		
<i>THE FOLLOWING QUESTIONS WILL ONLY BE USED FOR A VISITOR PROFILE, WE WOULD APPRECIATE IT VERY MUCH IF YOU COULD ANSWER AS APPROPRIATE</i>		
P.1	Gender	1. Male 2. Female
P.2	Age group (Please circle only one)	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

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

	Total case	Gender		Age group					
		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	4.3
1. Independent Tourists	100.0	63.1	36.9	3.3	36.1	30.5	18.0	8.4	3.6
2. Organized Tourists	100.0	63.3	36.7	2.4	24.1	25.9	22.3	16.9	8.4
3. Business Visitors	100.0	76.4	23.6	3.3	23.3	31.9	25.7	12.5	3.3
4. VFR (Visit friends & relatives)	100.0	61.9	38.1	3.4	24.4	32.9	23.3	10.5	5.5
5. North America	100.0	61.0	39.0	4.2	29.4	21.8	20.0	16.2	8.4
6. Neighboring Countries	100.0	71.4	28.6	3.2	27.3	35.8	24.0	7.8	1.9
7. Other Americas	100.0	76.2	23.8	2.4	23.4	32.3	25.0	12.9	4.0
8. Europe	100.0	60.2	39.8	2.7	37.3	30.6	14.9	9.7	4.7
9. Others	100.0	53.8	46.2	1.0	31.7	31.7	20.2	8.7	6.7
10. Single male visitors	100.0	100.0	0.0	8.2	56.3	25.3	6.3	3.9	0.0
11. Single female visitors	100.0	0.0	100.0	9.4	59.4	23.4	5.1	2.7	0.0
12. Married male visitors	100.0	100.0	0.0	0.2	11.8	36.4	35.8	15.7	0.0
13. Married female visitors	100.0	0.0	100.0	0.8	21.6	38.5	23.9	15.2	0.0
14. Third age male visitors	100.0	100.0	0.0	0.0	0.0	0.0	0.0	0.0	100.0
15. Third age female visitors	100.0	0.0	100.0	0.0	0.0	0.0	0.0	0.0	100.0
Tourist Average	100.0	64.8	35.2	2.9	33.0	31.3	19.3	9.4	4.1
16. Archaeology oriented tourists	100.0	69.4	30.6	1.4	32.0	30.9	20.1	11.0	4.5
17. Colonial oriented tourists	100.0	64.6	35.4	3.3	33.8	31.3	20.8	6.7	4.2
18. Living indigenous culture oriented tourists	100.0	52.6	47.4	2.6	40.6	28.1	15.6	9.4	3.6
19. Nature oriented tourists	100.0	62.8	37.2	2.4	34.8	32.9	20.3	7.2	2.4
20. Resort oriented tourists (beach & Spa)	100.0	72.3	27.7	3.6	33.7	34.9	21.7	6.0	0.0
21. Others	100.0	65.3	34.7	4.7	20.7	35.3	20.7	14.7	4.0
22. North American tourists	100.0	61.6	38.4	1.8	32.7	21.0	18.1	16.0	10.3
23. Neighboring Countries tourists	100.0	69.6	30.4	4.0	31.1	34.5	22.2	6.5	1.8
24. Other Americas tourists	100.0	71.0	29.0	1.0	30.0	32.0	25.0	10.0	2.0
25. Europe tourists	100.0	54.9	45.1	2.0	38.1	34.4	11.9	9.8	3.7
26. Others tourists	100.0	50.0	50.0	0.0	40.9	29.5	11.4	9.1	9.1
27. USA tourists	100.0	62.0	38.0	2.0	29.8	21.6	18.4	16.9	11.4
28. USA- Guatemalan VFR visitors	100.0	53.6	46.4	5.0	26.4	19.3	22.9	14.3	12.1
29. Salvadorian tourists	100.0	68.6	31.4	3.6	30.5	35.4	21.8	7.2	1.5
30. Salvadorian VFR visitors	100.0	66.7	33.3	2.2	25.0	36.0	24.1	10.5	2.2

Source: JICA Study Team, Visitor Survey in March and July 2001

Geographical region					Marital Status		Education		Repetitive Travel		Purpose of visit			
North America	Neighb. Countries	South America	Europe	Others	Single	Married	Co+HS ¹⁾	Uni+Post ²⁾	First timer	Repeat Visitor	Indep Holiday	Org. Holiday	Business traveler	Visiting F & R
%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
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	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
34.3	25.3	6.0	29.5	4.8	31.9	56.6	16.3	83.7	66.9	33.1	0.0	100.0	0.0	0.0
23.9	56.5	5.6	9.3	4.6	29.8	57.1	34.1	65.7	26.6	73.4	0.0	0.0	100.0	0.0
26.0	59.6	3.7	7.3	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	40.5	48.0	13.6	86.4	52.9	47.1	40.8	7.3	28.7	18.6
0.0	100.0	0.0	0.0	0.0	29.3	58.3	56.1	43.7	20.3	79.7	42.9	2.6	32.4	21.7
0.0	34.7	57.7	0.0	7.7	32.7	56.9	14.1	85.9	39.1	60.9	35.5	5.6	41.9	14.1
0.0	0.0	0.0	100.0	0.0	50.2	32.1	20.1	79.6	65.7	34.3	54.7	12.2	21.9	10.2
0.0	0.0	0.0	0.0	100.0	46.2	44.2	15.4	84.6	55.8	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
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	34.8	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
18.3	63.3	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
33.9	26.6	4.2	32.3	3.1	46.4	38.0	19.3	80.7	58.9	41.1	90.6	9.4	0.0	0.0
12.6	64.3	5.3	13.0	4.3	41.1	41.5	45.4	54.6	41.5	58.5	93.2	6.8	0.0	0.0
3.6	91.6	3.6	0.0	0.0	36.1	51.8	62.7	37.3	31.3	68.7	96.4	3.6	0.0	0.0
22.7	60.7	6.0	8.0	2.0	32.0	55.3	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
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 Characteristics of tourism segments for Guatemalan tourism (2)

	Influence to come to Guatemala										
	Travel agent	Brochure	AD. of TV ¹⁾	AD. of MG/NS ²⁾	MG/NS	TV/Movie	Experi. of former V.	Friend & family	Guate. tour office	Internet	Others
	%	%	%	%	%	%	%	%	%	%	%
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
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
9. Others	7.7	2.9	3.8	1.9	4.8	1.0	8.7	30.8	1.9	2.9	17.3
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
Tourist Average	9.4	11.8	3.7	3.3	6.2	2.3	32.3	50.4	1.1	6.2	4.6
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	3.4
20. Resort oriented tourists (beach & Spa)	1.2	6.0	2.4	1.2	2.4	3.6	47.0	60.2	1.2	6.0	1.2
21. Others	4.7	4.0	2.0	2.7	1.3	0.0	35.3	59.3	1.3	2.0	7.3
22. North American tourists	13.2	8.2	1.4	2.8	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	3.7	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
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- Guatemalan 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 TV, ²⁾ Magazine and newspaper

Source: JICA Study Team, Visitor Survey in March and July 2001

Other destinations considered choosing Guatemala						Reasons to visit Guatemala				
Mexico	Costa Rica	Belize	Honduras	El Salvador	South America	Lower price	Shorter Travel time	Richer T. Attract.	More relax Atmosphere	Others
%	%	%	%	%	%	%	%	%	%	%
8.6	6.0	2.8	3.6	3.2	3.3	10.7	11.9	15.4	6.5	18.1
13.3	8.6	4.5	6.6	3.1	4.8	17.1	19.2	27.3	9.9	13.3
13.9	11.4	6.6	6.6	4.2	7.8	7.8	8.4	30.1	5.4	19.9
3.1	4.0	1.2	1.0	3.4	1.1	6.2	3.8	3.4	2.5	23.1
4.6	1.8	0.5	0.4	2.7	1.8	5.0	9.4	4.1	5.3	15.7
9.3	8.0	5.1	3.8	2.5	3.9	10.8	3.7	13.4	5.2	26.4
5.0	4.1	1.8	3.4	3.2	0.7	11.3	19.8	11.3	6.9	10.3
10.9	9.7	4.0	4.0	7.3	4.0	8.5	6.0	22.2	6.0	29.4
18.2	7.5	1.2	3.7	2.2	10.4	10.9	3.2	30.1	6.5	22.9
12.5	4.8	2.9	3.8	1.0	5.8	7.7	3.8	18.3	10.6	21.2
9.8	6.1	3.1	3.2	1.3	4.0	12.1	9.0	17.4	6.1	16.3
10.9	5.6	3.6	4.2	3.3	5.4	12.7	10.0	15.8	7.4	18.3
7.2	6.5	2.3	4.1	3.6	2.3	9.7	14.1	13.4	6.3	18.6
8.0	5.3	3.3	2.9	3.9	3.1	11.1	11.7	16.9	6.2	16.3
11.1	3.3	1.1	1.1	2.2	4.4	6.7	8.9	17.8	11.1	27.8
12.5	7.5	5.0	0.0	5.0	0.0	2.5	7.5	22.5	2.5	27.5
13.8	9.3	5.1	7.0	3.5	5.2	16.4	19.5	30.0	10.0	14.1
20.7	11.0	8.2	9.9	6.5	6.2	22.7	16.4	42.2	6.2	12.2
12.9	13.3	2.9	9.6	2.9	1.7	14.2	27.5	34.2	10.8	12.9
19.3	13.0	6.3	9.9	4.7	11.5	16.1	14.6	37.5	9.4	22.4
11.6	5.8	7.2	4.3	1.9	5.3	14.0	22.7	32.9	16.9	13.0
8.4	4.8	0.0	4.8	0.0	1.2	12.0	41.0	16.9	21.7	8.4
10.0	9.3	4.0	3.3	3.3	6.7	25.3	21.3	14.7	10.7	26.7
11.0	15.3	11.4	9.3	4.3	7.1	20.3	7.8	29.5	7.5	23.8
8.8	6.3	2.9	6.9	3.2	0.7	16.9	31.7	22.9	11.3	9.0
23.0	13.0	9.0	8.0	8.0	7.0	13.0	11.0	42.0	11.0	11.0
26.2	9.4	1.6	4.9	2.5	13.9	13.9	4.1	45.1	7.8	18.4
20.5	9.1	6.8	4.5	0.0	9.1	9.1	6.8	36.4	13.6	15.9
10.2	15.3	11.4	8.2	3.1	7.1	19.2	7.5	31.0	7.1	23.9
4.3	2.1	0.7	0.0	2.9	2.9	3.6	2.1	6.4	5.7	20.7
8.9	5.3	2.5	7.2	0.4	0.4	15.3	35.4	22.0	12.9	7.0
3.1	0.9	0.0	0.4	0.0	0.0	4.8	17.1	2.2	3.5	12.3

Table 1.4 Characteristics of tourism segments for Guatemalan tourism(3)

	Principal attraction to come to Guatemala						Tourist activities	
	Arch. Sites	Colonial cities	Liv. Indi. Cultures	Nature & Wildlife	Resort (B'ch/Spa)	Others	Visits to Arch sites	Visits to Colo. city
	%	%	%	%	%	%	%	%
Whole Visitor Average	15.2	10.8	9.3	8.7	3.7	15.1	40.6	47.6
1. Independent Tourists	23.6	17.4	14.1	14.8	6.1	11.1	54.3	60.5
2. Organized Tourists	32.5	9.0	12.0	9.0	1.8	7.8	74.7	59.6
3. Business Travelers	6.7	5.0	4.5	1.5	0.8	20.5	22.7	34.3
4. VFR (Visit friends & relatives)	4.4	6.0	3.7	6.4	3.7	15.7	28.6	36.7
5. North America	17.1	9.7	15.2	5.4	0.8	12.2	51.6	56.6
6. Neighboring Countries	9.3	11.9	4.3	10.7	6.3	17.2	25.5	37.8
7. Other Americas	22.6	12.9	5.2	6.0	1.6	24.2	44.0	47.6
8. Europe	28.9	7.5	18.9	8.2	1.7	8.2	69.9	64.2
9. Others	14.4	12.5	10.6	13.5	0.0	10.6	54.8	55.8
10. Single male visitors	15.3	9.8	8.1	9.5	4.5	13.7	46.1	50.5
11. Single female visitors	14.1	10.3	16.5	10.5	2.5	10.9	46.9	54.7
12. Married male visitors	14.8	11.4	6.4	7.6	3.9	18.1	34.3	41.7
13. Married female visitors	14.2	10.5	10.7	9.9	4.1	13.0	42.4	50.6
14. Third age male visitors	27.8	11.1	13.3	4.4	0.0	14.4	45.6	54.4
15. Third age female visitors	15.0	15.0	15.0	7.5	0.0	12.5	55.0	65.0
Tourist Average	26.0	17.7	14.2	15.3	6.1	11.1	55.5	59.4
16. Archaeology oriented tourists	100.0	0.0	0.0	0.0	0.0	0.0	87.5	55.0
17. Colonial oriented tourists	0.0	100.0	0.0	0.0	0.0	0.0	36.3	87.5
18. Living indigenous culture oriented tourists	0.0	0.0	100.0	0.0	0.0	0.0	64.1	70.3
19. Nature oriented tourists	0.0	0.0	0.0	100.0	0.0	0.0	43.0	49.3
20. Resort oriented tourists (beach & Spa)	0.0	0.0	0.0	0.0	100.0	0.0	26.5	33.7
21. Others	0.0	0.0	0.0	0.0	0.0	100.0	37.3	44.7
22. North American tourists	28.1	15.7	23.1	9.3	1.1	12.1	70.1	66.5
23. Neighboring Countries tourists	18.1	22.3	7.5	19.5	11.2	13.4	37.9	50.5
24. Other Americas tourists	43.0	15.0	8.0	11.0	3.0	9.0	68.0	62.0
25. Europe tourists	39.8	8.6	25.4	11.1	0.0	4.9	82.0	72.5
26. Others tourists	22.7	18.2	13.6	20.5	0.0	6.8	65.9	68.2
27. USA tourists	28.6	15.7	21.6	9.8	0.8	12.5	68.6	65.1
28. USA- Guatemalan VFR visitors	8.6	7.1	9.3	7.1	1.4	7.1	42.9	55.7
29. Salvadorian tourists	16.9	23.1	5.9	20.6	13.3	12.9	37.1	53.0
30. Salvadorian VFR visitors	3.1	4.4	0.4	8.3	4.4	19.3	13.6	25.9

Source: JICA Study Team, Visitor Survey in March and July 2001

Visits to Indi. culture	Visits to Nat. areas	Visits to Resorts A	Spa	Visits to museums	Shopping	Sports	Tourist activities (participated in...)			Use/Package	
							Enjoyment Local food	Tourist facilities	Others	Not Used	Used Pack T
							%	%	%	%	%
42.0	37.2	17.6	9.2	21.9	41.2	22.7	10.0	50.5	10.0	88.7	11.3
51.1	49.3	24.3	10.9	26.4	42.9	18.6	11.5	52.0	3.0	95.7	4.3
49.4	50.0	12.7	11.4	36.7	59.0	16.9	11.4	42.8	3.6	0.0	100.0
33.2	21.5	8.3	7.4	14.6	38.3	27.1	8.4	49.6	20.8	92.2	7.8
32.4	31.7	19.9	7.3	19.6	36.5	27.0	8.7	51.2	7.8	92.9	7.1
59.4	44.5	15.3	7.3	29.4	57.3	21.3	16.8	57.7	16.1	84.3	15.7
27.2	28.9	18.8	10.8	16.5	27.8	26.0	4.5	47.9	6.8	94.1	5.9
35.5	30.6	12.9	10.5	18.1	47.6	20.6	14.1	48.0	10.1	83.5	16.5
65.4	54.5	19.9	7.0	28.1	55.5	15.7	14.9	50.2	10.4	81.8	18.2
49.0	49.0	17.3	5.8	26.0	44.2	19.2	8.7	42.3	9.6	83.7	16.3
43.2	41.0	17.9	8.9	23.4	38.7	22.1	12.1	50.6	6.9	90.2	9.8
58.3	47.8	26.6	10.5	28.6	56.0	27.9	17.2	59.6	11.4	89.5	10.5
33.4	31.0	14.5	8.9	16.0	34.8	21.6	7.4	46.3	12.2	88.9	11.1
45.5	37.4	19.1	10.3	27.2	45.3	24.1	8.8	54.1	6.2	87.2	12.8
48.9	38.9	10.0	3.3	24.4	48.9	14.4	10.0	46.7	14.4	90.0	10.0
62.5	60.0	12.5	5.0	45.0	60.0	10.0	0.0	50.0	10.0	75.0	25.0
47.9	47.9	22.6	11.5	25.3	42.6	17.4	9.2	48.5	2.5	85.2	14.8
49.6	46.7	17.0	7.6	29.2	42.8	10.8	7.4	47.9	1.4	80.2	19.8
43.8	24.2	12.9	9.6	27.1	43.3	17.5	6.7	43.3	0.4	89.2	10.8
79.7	63.5	22.9	9.9	28.1	67.7	20.8	15.6	59.4	2.6	89.1	10.9
41.5	73.4	29.0	13.5	18.4	32.9	15.9	8.7	52.2	1.9	90.3	9.7
22.9	47.0	65.1	25.3	19.3	13.3	10.8	4.8	42.2	2.4	95.2	4.8
36.0	32.0	19.3	10.0	25.3	40.7	31.3	15.3	46.7	8.7	89.3	10.7
62.3	50.5	13.9	7.5	33.8	61.2	20.3	16.7	53.0	5.3	78.3	21.7
33.3	42.3	29.7	15.6	18.8	26.6	17.8	3.5	44.8	1.6	91.9	8.1
43.0	44.0	14.0	10.0	26.0	56.0	15.0	12.0	51.0	0.0	78.0	22.0
73.4	60.7	17.6	7.4	32.8	61.9	16.4	16.0	53.7	3.3	77.5	22.5
54.5	50.0	11.4	2.3	29.5	38.6	6.8	6.8	47.7	0.0	81.8	18.2
61.2	51.0	12.9	7.1	32.9	60.4	20.0	16.1	52.5	5.1	78.0	22.0
59.3	54.3	24.3	12.1	27.1	52.1	23.6	15.0	60.7	9.3	88.6	11.4
32.6	44.9	35.0	16.5	17.4	23.9	15.0	3.4	47.9	1.5	94.3	5.7
14.9	17.5	18.0	3.9	17.5	25.4	25.0	5.7	50.9	8.8	96.5	3.5

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

	Travel companion							
	Alone	Spouse	Family spouse/ son	Friends	Family & relatives	Family & Friends	Business associates	Others
	%	%	%	%	%	%	%	%
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 friends & 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. Europe	35.6	15.4	6.2	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	30.0	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
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	43.4	18.4	14.9	11.8	7.0	4.8	0.9	0.0

Source: JICA Study Team, Visitor Survey in March and July 2001

Length of stay			Length of stay			Departments visited							
Whole itinerary (nights)			Guatemala (nights)			Guatemala	Sacatepequez	Sololá	Potén	Izabal	Quetzaltenango	Quiché	Alta Verapaz
Mean	Median	Mode	Mean	Median	Mode								
#	#	#	#	#	#	%	%	%	%	%	%	%	%
18.7	8.0	3.0	12.8	6.0	2.0	57.4	36.5	22.4	21.9	10.8	10.2	8.6	6.5
21.0	10.0	3.0	13.3	7.0	2.0	47.6	52.9	33.3	32.2	16.8	15.5	13.6	10.2
22.5	10.0	10.0	13.0	8.0	3.0	56.6	55.4	40.4	48.8	13.9	9.0	14.5	4.8
17.2	5.0	2.0	13.2	4.0	2.0	70.4	16.9	8.2	7.7	3.8	5.5	3.2	3.3
14.0	6.0	3.0	11.0	5.0	2.0	59.3	26.0	14.6	14.1	8.2	6.6	3.4	3.7
26.2	11.0	10.0	17.4	8.0	8.0	51.7	50.1	29.8	29.4	10.8	11.2	8.0	5.1
8.0	4.0	3.0	6.6	3.0	2.0	58.3	22.5	12.5	9.7	7.7	8.9	5.4	6.8
17.2	10.0	15.0	11.0	6.0	6.0	67.7	31.5	24.6	25.4	10.9	6.0	6.9	3.6
42.0	21.0	30.0	25.9	14.0	5.0	58.7	61.2	43.0	47.8	22.1	15.7	23.1	9.5
33.8	15.0	15.0	22.1	9.0	8.0	60.6	51.0	24.0	33.7	9.6	10.6	7.7	8.7
25.0	9.0	2.0	16.4	7.0	2.0	56.9	41.3	23.5	24.0	12.9	11.6	8.2	6.8
30.7	13.0	2.0	19.3	8.5	3.0	49.8	48.4	32.4	28.3	15.4	15.4	13.6	9.4
12.4	6.0	3.0	9.0	4.0	2.0	62.3	27.1	17.2	17.3	8.0	7.2	5.7	5.3
16.5	8.0	3.0	11.4	6.0	2.0	52.5	44.0	24.7	25.7	11.3	11.7	12.3	6.8
22.5	10.0	2.0	19.6	8.0	1.0	63.3	32.2	23.3	14.4	11.1	8.9	5.6	6.7
19.2	13.0	2.0	12.9	10.0	8.0	40.0	50.0	35.0	40.0	10.0	10.0	12.5	5.0
18.5	9.0	3.0	10.8	6.0	2.0	49.9	51.0	34.1	33.4	17.0	13.7	14.3	10.0
20.8	12.0	10.0	10.5	7.0	5.0	52.7	52.4	34.3	60.6	19.5	12.5	17.0	8.2
11.7	6.0	3.0	7.7	4.0	2.0	47.1	57.5	25.4	15.0	4.6	8.3	5.8	4.6
32.3	18.5	30.0	18.5	11.0	2.0	49.5	66.1	49.5	41.7	27.1	19.3	24.0	9.9
15.3	7.0	3.0	9.7	5.0	2.0	49.8	41.1	38.6	27.1	22.7	16.4	15.9	17.9
10.4	5.0	3.0	8.0	4.0	2.0	41.0	39.8	26.5	3.6	16.9	14.5	10.8	10.8
16.2	7.0	3.0	10.3	5.0	2.0	56.0	38.7	21.3	18.7	10.7	11.3	8.0	9.3
27.1	14.0	10.0	14.0	8.0	10.0	42.7	61.2	39.5	49.1	15.3	10.7	10.0	5.3
8.5	5.0	3.0	7.0	4.0	2.0	50.7	36.4	23.1	14.0	13.2	14.7	10.4	12.3
18.8	15.0	15.0	10.9	8.0	6.0	50.0	55.0	41.0	49.0	19.0	8.0	12.0	6.0
36.6	21.0	30.0	17.5	12.0	7.0	55.7	75.0	54.5	62.3	29.9	18.0	30.7	9.8
24.0	16.0	30.0	13.1	8.0	8.0	54.5	70.5	45.5	43.2	9.1	9.1	18.2	15.9
24.3	12.0	10.0	13.5	8.0	3.0	45.1	59.6	36.9	46.3	15.3	9.0	8.2	5.5
17.2	11.0	10.0	13.3	9.0	7.0	57.1	43.6	27.1	16.4	12.9	10.0	2.9	5.0
8.5	5.0	3.0	7.4	3.0	2.0	52.5	38.3	24.1	8.5	14.0	14.0	13.1	15.0
7.6	4.0	3.0	6.1	3.0	2.0	64.9	12.3	4.8	4.8	3.9	2.6	35.1	2.2

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

	Accommodation Used							Combined destination		
	Hotel Lodge	Aparthoel (Suite)	F & R Home	Own Home	Camping	Home Stay	Others	Only Guate.	Mundo Maya	Others
	%	%	%	%	%	%	%	%	%	%
Whole Visitor Average	77.9	4.4	21.9	1.5	2.3	5.2	2.1	65.2	37.3	17.2
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
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
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 male 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
Tourist Average	87.3	5.5	12.4	0.8	3.3	2.6	0.7	58.6	52.0	15.6
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
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	11.7	2.1
24. Other Americas tourists	88.0	11.0	14.0	0.0	4.0	1.0	2.0	39.0	50.0	23.0
25. Europe tourists	90.2	7.4	11.1	1.6	2.0	4.5	2.0	19.7	74.6	21.3
26. Others tourists	86.4	9.1	6.8	2.3	2.3	0.0	2.3	15.9	65.9	40.9
27. USA tourists	85.9	5.1	12.5	2.0	6.3	5.5	0.4	38.8	75.3	23.9
28. USA- Guatemalan VFR visitors	58.6	3.6	62.1	4.3	1.4	2.9	5.0	57.9	29.3	20.7
29. Salvadorian tourists	87.1	1.3	13.4	0.2	1.3	0.8	0.0	92.2	8.0	2.8
30. Salvadorian VFR visitors	32.0	1.8	70.2	1.3	0.0	0.9	0.0	93.9	6.6	2.2

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

Total Exp. p/day- p/pax (Total itinerary-USD-)			Total Exp. p/day- p/pax (in Guatemala -USD-)			Rating Adequacy Services & Facilities in Guate. Tourism ¹⁾			
Average	Median	Mode	Mean	Median	Mode	Security	Manners of street vendors	Avl'bility of ent'nl & night activ.	Avl'bility of good guides
#	#	#	#	#	#	#	#	#	#
126.3	50.0	50.0	100.6	38.0	50.0	2.43	1.96	1.84	1.74
88.8	40.0	17.0	66.8	33.0	50.0	2.42	1.90	1.82	1.70
163.4	100.0	50.0	102.2	50.0	100.0	2.08	1.88	1.84	1.58
188.1	81.0	100.0	166.9	58.0	100.0	2.44	2.03	1.85	1.80
92.4	39.5	50.0	70.9	31.0	50.0	2.53	2.03	1.87	1.78
165.5	92.0	100.0	87.9	40.0	50.0	2.26	1.92	1.74	1.65
84.4	28.0	25.0	94.0	33.0	50.0	2.41	1.95	1.80	1.76
188.3	125.0	100.0	171.1	78.0	50.0	2.48	2.10	1.96	1.91
157.8	66.0	50.0	109.4	42.0	100.0	2.70	1.95	2.04	1.75
224.3	76.0	67.0	106.6	55.5	100.0	2.68	2.12	2.07	1.80
107.3	42.0	100.0	74.5	33.0	50.0	2.45	1.99	1.91	1.75
107.5	40.0	100.0	77.7	29.0	13.0	2.41	1.95	1.82	1.71
148.6	54.5	50.0	126.6	50.0	50.0	2.41	1.96	1.82	1.76
100.5	50.0	100.0	78.8	35.0	25.0	2.45	1.92	1.80	1.74
159.5	91.0	50.0	138.7	50.0	100.0	2.73	2.25	1.90	1.75
134.1	50.0	8.0	56.5	36.0	50.0	1.93	1.85	1.68	1.46
98.4	42.0	17.0	72.4	36.0	50.0	2.38	1.90	1.84	1.71
105.4	58.0	100.0	85.7	50.0	50.0	2.27	1.80	1.85	1.64
87.1	33.0	13.0	61.5	35.0	25.0	2.45	2.00	1.85	1.73
93.9	46.0	33.0	59.0	33.0	50.0	2.51	1.79	1.80	1.73
116.2	31.5	17.0	75.0	34.5	25.0	2.48	1.98	1.88	1.78
51.4	25.0	17.0	60.1	25.0	13.0	2.49	2.00	1.78	1.57
88.5	38.0	25.0	72.6	29.5	25.0	2.36	1.94	1.79	1.73
157.0	83.0	100.0	75.9	40.0	25.0	2.14	1.77	1.77	1.63
50.7	24.0	13.0	52.5	28.0	25.0	2.42	1.98	1.82	1.75
166.6	100.0	100.0	131.1	67.0	50.0	2.30	1.94	1.82	1.71
114.8	61.5	48.0	106.2	44.5	100.0	2.54	1.81	1.97	1.69
295.5	69.0	111.0	90.2	52.0	50.0	2.60	2.02	1.95	1.68
166.8	92.0	100.0	79.9	42.5	25.0	2.17	1.77	1.77	1.65
144.9	75.0	100.0	94.5	38.0	50.0	2.59	2.18	1.86	1.82
33.0	18.0	13.0	40.1	25.0	25.0	2.41	1.97	1.80	1.73
38.2	20.0	13.0	37.4	25.0	25.0	2.39	1.92	1.79	1.64

Table 1.7 Characteristics of tourism segments for Guatemalan tourism (6)

	Rating Adequacy of Some Services and Facilities in Guatemalan Tourism ¹⁾							
	Avl'bility of food & rest.	Avl'bility of good hotels	Chances for comly life	Avl'bility of shop'g items	Envm't protection	Tourism information	Reli.&qual. of Tour Op.	Taxi serv. & public trans.
	#	#	#	#	#	#	#	#
Whole Visitor Average	1.65	1.65	1.81	1.70	2.49	1.91	1.83	2.14
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. North America	1.55	1.53	1.66	1.52	2.76	1.86	1.76	1.86
6. Neighboring Countries	1.68	1.72	1.83	1.79	2.22	1.87	1.81	2.19
7. Other Americas	1.67	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. Others	1.93	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 male 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
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
22. North American tourists	1.56	1.52	1.68	1.51	2.64	1.86	1.71	1.80
23. Neighboring Countries tourists	1.74	1.78	1.82	1.81	2.29	1.91	1.84	2.25
24. Other Americas tourists	1.67	1.61	1.75	1.61	2.32	1.93	1.74	2.27
25. Europe tourists	1.62	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	1.68	1.63	1.79	1.73	2.87	1.95	1.93	2.09
29. Salvadorian tourists	1.73	1.78	1.80	1.83	2.32	1.90	1.82	2.29
30. Salvadorian VFR visitors	1.65	1.72	1.79	1.74	2.16	1.70	1.70	2.21

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

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

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.

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

c	Location	Type of business	Field of specialization	No. of Employees	Customers' origin: Foreign/Domestic	Increase/decrease
1	Flores, Peten	Tour Operator, transportation agencies & Hotel	Travel itineraries in Peten	35	Foreign: 80%; National: 20%	
2	Flores, Peten	Hotel	Lodging	16	Foreign: 60%; National: 40%	
3	Flores, Peten	Transportation company	Land and River transportation in Peten Department	18	Foreign: 90%	Domestic market is increasing although they rarely buy company services. Italian backpackers are increasing in recent years. Visitors from South America (Chile, Argentina & Brazil) have also an increasing trend.
4	Guatemala City	Hotel	Lodging	352 plus 60 on temporary basis	Foreign: 100%	
5	Guatemala City	Airline	Air Transport	80-100	Load factor: 89%	
6	Guatemala City	Airline	Air transport	65 persons until they closed operations. Now 5		Suspended flights to Guatemala (also to San José de Costa Rica, Buenos Aires, Santiago de Chile and Guayaquil).
7	Guatemala City	Airline	Air transport			Increased due to Spanish multinationals and KLM flight cancellation. Other Europeans are also increasing. Iberia is considering a direct flight to Guatemala in the short medium term (now they fly via Miami, 10 times a week). They require also outbound tourism to balance operations.
8	Guatemala City	Tour operator, Wholesaler, Transport	Guatemala (90%), Honduras (9%) and Belize (1%).	105	Foreign 100%	Decreasing. Spain increasing because language and Guatemala product. Spain has a better economic situation than before joining EU. Also increasing Japan, Chile and Argentina.
9	Guatemala City	Transport	Air transport	120	Foreign 60%, Guatemalan Origin: 40% (including ethnic market).	Growing markets: a) Ethnic market from USA; b) Leisure market from Costa Rica.
10	Guatemala City	Tour Operator	Eco & Adventure tourism	12	Foreign: 80% Domestic: 20%	
11	Guatemala City	Association	Tourism	12	Tourism industry	Domestic tourism has potential but no one seems to care. Nobody promotes domestic (internal) tourism and services are inadequate. The association together with a bank is going to start an advertising campaign: motto: "Conoce tu República Primero"
12	Guatemala City	Tour Operator	In bound Operator, Wholesaler, JAL Rep.	12		Japanese people to Guatemala has decrease after Todos Santos event (50%) due cancellation. Japan TO have excluded Guatemala of their brochures (except several long related: Mexico Kaniko, Mikado, Eurasia, Kinjo).
13	Guatemala City	Tour Operator	Cruiseship operation	2	Foreign 99%	No ships arriving now. they used to handle 600 persons per ship (6 ships per year).
14	Guatemala City	Transport	Air transport	54	Local 25%; 75% Foreign	Asia market increasing. Also increase of business travelers. They increase capacity according with season between 5% (June) to 35% in January.
15	Guatemala City	Hotel	Lodging	500	Foreign: 100%	
16	Quetzaltenango	Tour Operator	Travel Agency and Tour operator	6		A decreased
17	Quetzaltenango	Hotel	Lodging		International tourism (30%) & domestic tourism (20%); business (30%) Others (20%)	
18	Quetzaltenango	Tour Operator	Xela and surroundings	12		
19	Quetzaltenango	Tour Operator	Subcontracted by major tour operators to run package tours in the Xela area. Field of specialization: nature and adventure tours.	5		In Quetzaltenango area it is reported a growing market for MZAR & Bika stimulated by local and national competitors. There are clubs based in Guatemala city.
20	Cobán, Alta Verapaz	Spanish School	Spanish school	2 plus additional when needed	Foreign 100%	
21	Cobán, Alta Verapaz	Internet-cafe	Communication services	4	Foreign 99% Domestic 1%	This year decreasing due security problems.
22	Cobán, Alta Verapaz	Hotel	Lodging	33+7 temporary	Foreign 40% Domestic 60%	NGO's growing. Seminar facilities allow them to receive them.
23	Cobán, Alta Verapaz	Lodge	Lodging	15	Foreign 5% Domestic 35%	
24	Cobán, Alta Verapaz	Transport company	Transport	15	Domestic (locals) 80%; International: 20%	Decreasing due the insecurity problem.
25	Cobán, Alta Verapaz	Hotel	Lodging	5	25% Foreign 75% Domestic	Increase: Mexicans due road, Salvadorians because they know the area now
26	Cobán, Alta Verapaz	Lodge	Lodging		100% Foreign (Backpackers)	
27	Cobán, Alta Verapaz	Tour Operator	Agrotourism	2	Domestic basically	

Geographic areas	Length of stay	Seasonality
Germany, France, United Kingdom, Puerto Rico	According with package they stay from 1 week to 20 days or more	Germany: Sep-Oct; France (all year round AYR); UK (AYR); PR (Jun-sep).
1. Holland, 2. Germany, 3. USA, 4. Canada	Domestic: 2-3 nights (business), Foreign: 2 nights	Domestic: AYR;
USA and Euro (Italian, French, Spanish and Germans) are traditional segments. Italians in particular	For USA market everything is pre-arranged whether they come in group or FIT.	
1. San Salvador; 2. USA, 3. Mexico; 4. Costa Rica; 5. Panama; 6. Spain. Individuals: 75% (Corporate 90%; Leisure: 10%). Airlines: 15%; Groups: 10%.	2.5 nights Double Occ. Factor: 1.5	
Europeans mainly	3-4 days in Pelen.	
Spaniards		
1. Spain 2. USA 3. UK 4. Germany-France 5. Japan	1. Spain (12 days Avg.), 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, 4. Germany-France AYR, 5. Japan (Nov-March).
Flight SF CO-LA-GUA (S.JOSE, Costa Rica): 50% Ethnic market, 30% Business Mt; 20% Leisure mkt. The way Back: Leisure: 75%; Business 25%.	Business: (30%) 5 days avge. Leisure: (70%) 15 days avge.	
1) Belgium, 2) Holland; 3) Canada; 4) USA; 5) Domestic (students). Europeans spend USD \$ 70-100 while Americans spend USD \$ 150.	1) Belgium (20-23 days) 2) Holland (20-23 days); 3) Canada (7-14 days); 4) USA (7;14 days); 5) Domestic (students)	1) Belgium (May-Dec), 2) Holland (May-Dec); 3) Canada (Dec-May); 4) USA Dec-May; 5) Domestic (students)
MtC market could be a possibility for Guatemala given the fact has better hotel infrastructure than other Central American Countries. Ethnic market is forgotten and is very important.		
1) USA 2) Europeans (incentive travel).	1) USA (12 hours) 2) Europeans incentive: (Guatemala-Antigua 1-2 days; Lake Atitlan 1-2 days; Chichicastenango & surroundings 2-3 days and Tikal 2 nights at least)	1) USA from Nov- April.
Local (25%) 75% (USA / European)		
Central America: 50%; others: 50%.	2 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.	
USA & Europe (especially Germany).		
Mainly Europeans (Before, USA was 80% until travel warnings posted by American government in internet).	They usually stay 1 night. Students in Spanish school stays about 3 weeks and start to travel after that.	
USA, Israel, Holland, France are major origins: Europe concentrates 35% of business.	Tourism stay only 1 night in Quetzaltenango	
Europe (France, Italy, Switzerland, Germany in particular) represents 50% of the total business amount. USA represents 20%.	They stay 1 or 2 nights in Quetzaltenango.	
USA, Europeans (Germany, Switzerland).	4 students per month (4 hours lesson daily 5 days a week cost: USD \$ 120 all included room, meals w/family as well as tuition & lessons).	
Europeans mainly. Before also USA (they are not arriving because the "travel warning")		
Foreign people comes with NGOs; USA, El Salvador,	Groups: 2-3 days; Foreign: 5 days avge.	August from El Salvador (vacations); June: medicine doctors from USA; Holy week and weekends; domestic. International events like Marathon, Cycling.
Domestic: Students, Christian groups; Foreign: (USA, Canada) Christian groups, NGO's (training activity people).		
Guatemala City, Alta Verapaz, Micoans, Spaniards and Salvadorans	Domestic: 2-3 nights; Foreign: 5 nights	All year round, July-August (vacations)
USA, Canada, Switzerland, Holland & Germany.	Foreign: 2-3 days	
Guatemala City, Antigua	2 days 1 night	

Table 1.3 Record of Interviews with the Guatemalan Travel Trade (2)

c	Location	Type of business	Principal problems to promote tourism	Strengths of Guatemala
1	Flores, Petén	Tour Operator, Transportation Services & Hotel	Access infrastructure; Not only roads but crushings infrastructure also	Variety and richness of cultural & natural assets
2	Flores, Petén	Hotel	Misunderstanding about insecurity; Lack of promotion;	
3	Flores, Petén	Transportation company	Tour Operators based in Guatemala City tend to give priority to sell Guatemala Highland (Antigua, Quetzaltenango, Atitlán) due to their familiarity. They are ignorant of tourism possibilities in Petén.	
4	Guatemala City	Hotel	Guatemala needs a master plan to guide development as well as a budget. Master plan will establish Guatemalan infrastructural needs to take advantage of huge tourism resources it has.	Beautiful country with huge tourism resources in a relative small territory. Compared with Costa Rica, Guatemala has a lot more to offer.
5	Guatemala City	Airline	1. Security; 2. Tourism facilities; 3. Tourism information; 4. Tourism education.	
6	Guatemala City	Airline	Airline didn't find conditions to fly to Guatemala because: taxes, land permits and changes in operational cost. Seat availability is not very large. Guatemala is insecure & violent.	Guatemala has a lot to offer.
7	Guatemala City	Airline	CA is recovering of bad media covering (Mich Hurricane). Insecurity is a big issue. An important lack of statistical data.	Guatemala has a lot to offer. In the past passengers arrived to Guatemala in their way to other countries. Now they come directly to Guatemala.
8	Guatemala City	Tour operator, Wholesaler, Transport	Very limited quality brochures showing tourism resources and attractiveness of Guatemala. Brochures are not very attractive either.	Arqueology-Colonial cities-nature.
9	Guatemala City	Transport	1) Security. A local program is needed involving Mayor, Local police and even army; 2) Special branch at INGUAT to handle marketing strategy. Current actions irregular and with little impact. Advertising campaign should be very important.	Diversity. Natural options in Guatemala are not used.
10	Guatemala City	Tour Operator	1) Security problems; 2) Education in tourism is a very important to cope with; 3) A good road network.	
11	Guatemala City	Association	1) Image outside the country is bad not only cause insecurity issue; 2) Guatemala has not image at all. Foreign markets are not aware of Guatemala as a tourism country.	
12	Guatemala City	Tour Operator		Culture (history) archeology; Textiles.
13	Guatemala City	Tour Operator	1) Security. Guatemala is in the media just with negative news; 2) In the crushup business port rates are very high (20 USD per pax); 3) INGUAT lack of resources to face tourism problems.	Natural & cultural resources. Rich history. Tradition.
14	Guatemala City	Transport	Security. In local communities kidnappers are still in local. This events are surely negative for tourism.	Abundant tourism resources in Guatemala territory; Ruins, Antigua, Guichicastenango, etc. Some people says Costa Rica is more attractive but he doesn't think so the is coming from Costa Rica!
15	Guatemala City	Hotel		A lot of tourism resources in a small territory. Variety - Archeological, culture, nature.
16	Quetzaltenango	Tour Operator		
17	Quetzaltenango	Hotel	Lack of tourism development in Quetzaltenango area. Short stay of tourism; limited range of activity due time and money which member can afford.	
18	Quetzaltenango	Tour Operator	Legal and institutional framework as well as coordination. IDEAEH, INGUAT, Ministry of Agriculture, CQRIAP, SICEPLAN, INFOM, and other institutions come with ideas and questions but they don't come back. There are no rules for historic buildings. Municipality gives permissions to destroy buildings and they don't allow others to construct a walk or a bathroom.	
19	Quetzaltenango	Tour Operator	INGUAT chose 4 people as members of Quetzaltenango Local Tourism Committee but many of those working for tourism do not consider them as their representatives. There is another tourism organization called FORO based on groups organized by INFOM (Instituto Nacional de Fomento Municipal), which includes former members of the Cámara de Turismo, Consejo de Gerenciales de Turismo and Grupo Municipal de Gestión. This organization includes Totonicapán and Soledad Departments.	
20	Cobán, Alta Verapaz	Spanish School	1) Security. Government should do something fast; 2) Bad quality of basic services 3) Taxes (few & dirty); 4) Air fares to/from Guatemala are too expensive.	Cobán has advantages for spanish teaching because one family receive one student. Antigua has a lot of students with one family. Cobán: natural resources
21	Cobán, Alta Verapaz	Internet-calls	1) Security; 2) information, Maps; 3) Hotels 4) Bus schedule.	
22	Cobán, Alta Verapaz	Hotel	1) Road network is a problem for TO's (although they don't work with that segment); 2) Security; 3) Services. By example, S Champey has not restaurant facilities, water, and good toilets	Nature, food, adventure & eco tourism.
23	Cobán, Alta Verapaz	Lodge	Poor general access to tourist sites and inappropriate facilities. People awareness of tourism benefits; involvement of local community.	
24	Cobán, Alta Verapaz	Transport company		In Cobán: Natural attractions.
25	Cobán, Alta Verapaz	Hotel	1) INGUAT's promotion concentrates in traditional areas; they don't offer other alternatives; 2) Promotion & identification of places; 3) People of Cobán needs motivation to impel Cobán resources.	Nature & kindness of people
26	Cobán, Alta Verapaz	Lodge	Access infrastructure	
27	Cobán, Alta Verapaz	Tour Operator		

Weaknesses of Guatemala
Insecurity
a) Tikal does not have a tourism plan; carrying capacity is not set and the site is open for 24 hours; b) Local government does not have a tourism plan; they should introduce a priority scheme. There is a lack of "estándar hotels" in Peten. Hotels in Peten are very expensive or cheap.
Guatemala don't know how to make full use those resources. Insecurity.
Lack of coordination in tourism activity. Lack of communication. Inexistence of clear objectives and organization.
Guatemala as an attractive destination but insecure and unstable. Nobody is interested in Guatemala city cause is dirty, noisy and insecure. Besides, city lacks of urban activity such as museums & others. That is why foreign goes directly to Antigua from airport.
Lack of promotion. Guatemala is not known in the world. Security is a major concern. Lack of trained people to work in travel industry.
1) Insecurity; 2) Lack of confidence in authorities. Lack of leadership.
Number & location of hotels, roads, etc. Development of human resources; Strong weakness in security problem.
Lack of professionalism (private & public sector) handling tourism
Guatemalan people tend to be close-minded to foreign tourist (??).
Compared with Guatemalans, Colombians are more hardworking and entrepreneurial. Guatemalans tend to be passive, obedient and no cooperative. There are many groups that are not functioning because people can't think of group benefit. There is a lack of hotels rooms in Xela, and the quality of services are not high. Hotel staff needs more training. Camara de turismo is not functioning anymore. People here don't get together.
Quetzaltenango is a less known destination due to the lack of tourism promotion.
This type of tourism has a lot of mobility. Coben has no places where people can meet to talk. This is looked for tourist (like in Antigua and Quetzaltenango)
Lack of information
Access infrastructure; security, facilities (food & Beverage) Lack of promotion.
Lack of efficient transportation (They always have an emergency car behind the bus to help them at any irregular event). Deficient quality of service.
Access infrastructure; Lack of promotion
Lack of access infrastructure

Table 1.3 Record of interviews with the Guatemalan Travel Trade (3)

c	Location	Type of business	Principal tourism products
1	Flores, Petén	Tour Operator, transportation services & Hotel	They offer: mini-tour options (1-2 nights); The Big Hands (1-7 nights); Petén (1-2 nights); Maya World (3-7 nights); Eco-archaeology (1-4 nights); Short Excursion (half or full day).
2	Flores, Petén	Hotel	
3	Flores, Petén	Transportation company	The company subcontracts the operation of tours in Petén from major tour operators in Guatemala (with thin profit). Sells their products through its connections with TO as well as advertisement in magazines. Typical tours is the best sailing tour. Next in the list are Cobal & Yaxá. Less popular El Mirador and & Yaxchilan. Rivers product are considered important. 3 day trip to Ceibal, Dos Pías & Aguacaca is a typical itinerary. Trips to Yaxchilan use Posada Maya en Bethel (basic but not bad).
4	Guatemala City	Hotel	
5	Guatemala City	Airline	Route Guatemala City-Flores-Cancun & viceversa. Take off early morning come back afternoon. Friday and Sundays goes to Cancun coming back afternoon.
6	Guatemala City	Airline	Europeans prefer Costa Rica but being there they realize Guatemala is an "exotic" country (so they perceive the country) where they can have an adventurous experience, something Europeans like very much.
7	Guatemala City	Airline	Guatemala has a lot to offer (more than Costa Rica). Actually tourists are somehow disappointed after Costa Rica trip.
8	Guatemala City	Tour operator, Wholesaler, Transport	1) Highland tours (100% takes it); 2) Archaeological tours (75% takes it); 3) Basic Services & Tours (100% takes them), and Special packages.
9	Guatemala City	Transport	a) They plan to share codes with MEX Airlines from Mexico; b) They plan to fly from Miami probably next year. c) United might buy Mexicana Airline in the future. This would strength Guatemala in the Mexican market (which she says is for leisure as well as for business).
10	Guatemala City	Tour Operator	Package tours in camping, adventure and archaeological tours (7-10 days duration).
11	Guatemala City	Association	
12	Guatemala City	Tour Operator	1) Antigua; 2) Atilán; 3) Tikal; 4) Guatemala City; 5) Coffee Finca; 6) Sugar plantation (combining archaeology & Museums); 7) Fishing trip; 8) Trip to Copán (Honduras).
13	Guatemala City	Transport	Guatemala - Houston (2 daily flights); Guatemala - Newark (1 weekly flight)
14	Guatemala City	Hotel	
15	Quetzaltenango	Tour Operator	In addition to typical itineraries, bird watching, volcano tours. Typical tour: Cathedral, Municipal library, Museum & others related with Maya culture. Hot springs, Zuni and Sakaja. Spanish Schools: 3 weeks lessons and traveling individually for about 4 weeks.
16	Quetzaltenango	Hotel	Information in tourism guides: Quetzaltenango, Totonicapán, Momostenango, Amolongo, Zuni, San Martín Sacatepéquez, San Francisco el Alto. Spanish Schools (more than 10): They are second in number in Guatemala after Antigua. Main attraction: cheaper fees tuition and living cost.
17	Quetzaltenango	Tour Operator	Santa María active Volcano, Santiago and Fuentes Geográficas are the principal tourism objectives in this area. Finca Ecológica in Retalhuleu and INTRA are also important tourism attractions. Pasaje Encioque is owned by more than 10 people and their tenants often re-rent property. This makes historical use of the historical building very difficult (tenant fee is also very cheap which is a pity). Many tourists in Xela come from San Cristóbal de las Casas in Mexico integrating a tourist route: San Cristóbal-Xela-Panajachel. Volcanoes are a principal attraction for domestic tourism; They may be interested in cultural aspects if good programs would exist (such as Maya Altar, Maya temple and traditional medicinal treatments).
18	Quetzaltenango	Tour Operator	The company operates Mount & Bike tours in Quetzaltenango and his vicinity: Fuentes Geográficas, Santa María Volcano, Amolongo hot springs, Santa María Shrine and Maxanón in Zuni, Laguna Chichabal and San Francisco el Alto market. Differentiation of tourism products based on living indigenous cultures is more difficult than those based on nature. Many of the Spanish schools in Xela are operated by NGOs that do not expect profit. Many of the schools include visits to neighboring tourism sites in their programs, which considerable constrains tour operators and travel agents.
19	Cobán, Alta Verapaz	Spanish School	Spanish school were important to promote tourism to Antigua and Xela.
20	Cobán, Alta Verapaz	Internet-café	
21	Cobán, Alta Verapaz	Hotel	Coffee Finca, Orchids nursery, Hay Marcos caves, Semuc Champey, Lanquán.
22	Cobán, Alta Verapaz	Lodge	Camping. They are trying to build an eco-tourism cottages to bring this type of tourism.
23	Cobán, Alta Verapaz	Transport company	1) Semuc Champey 90%; 2) El Estor, Rio Dulce, Livingston: 30%. Market for this places: 50% locals; 50% internationals.
24	Cobán, Alta Verapaz	Hotel	
25	Cobán, Alta Verapaz	Lodge	Bkubany farm and lodge with recreational activities.
26	Cobán, Alta Verapaz	Tour Operator	
27	Cobán, Alta Verapaz	Tour Operator	

Psychographics characteristics	Potential tourism attractions
Normally they are adult or elder people (more than 40 y.o.) There are a lot of women traveling in groups. People from Puerto Rico are younger than Europeans. Couples mainly (no children or traveling without them); 20-30 yo (40%); 30-40 yo (40%); +40 yo (20%). Economic status: middle class. Deutch are older people in general.	Yaxaj, Nakum, Dos Picos, Arroyo de Piedra, Alta Verapaz has a very nice and interesting places. In Las Flores surroundings: Palencio; El Mirador del Rey Kanek 3 day trip to Sayaxche area could be combined with itinerary to Yaxchilan.
	Izabal Itz'ka; Volcanos.
Aged people that needs facilities and good installations. Young people is backpacker whom demand simple or very simple accommodations and facilities.	Ecotourism, Peten. Ecotourism is in the way to play a major role.
	Guatemala is the most important city in CA region. She considers MICE market should be developed. She has heard about Cobán specially for ecotourism development.
Average 50-60 years old. In general traveling in couples.	Yaxja & Ceibal
	1) Semuc Champey; 2) IRTPA (Itabuhleu) 3) Aguas Geórginas.
	El Peru, Yaxja, Nakum,
	Natural resources (Alta Verapaz).
Cruise ship passengers, 55-75 yo. Incentive- Europeans (30-60 yo). Cruise ship is now changing to include younger people and even children traveling w/parents. It is becoming more family oriented.	Alta Verapaz: Cobán has international value; Sierra de las Minas for ecotourism. Bioparque del Quetzal. Izabal area: El Canal Inglés is a beautiful natural place. Quetzaltenango and surroundings: Champerico Perí; Abaj Takalik; IRTPA; El Manchón; Totonicapán (for natural tourism as well).
Increase of business travelers. Ex-refugees Guatemalan market is also attractive since they often go back between Nortamerica and Guatemala to see their families & friends. Mostly business from other countries.	
Students visit this country with two objectives: 1) volunteer; 2) learning Spanish & indigenous languages. Generally they make groups of 15-30 members of which girls are prevailing and about 20-25 groups arrive a year.	A famous hot spring named Fuentés Geórginas. San Francisco el Alto market.
Business travelers, Spanish school students. Interviewee considers that just about 5% of tourism arriving at Guatemala airport come down to Quetzaltenango (Main destinations are: Guatemala City, Antigua, Panajachel, Chichicastenango and Peten). They don't handle student market because of small profit and competition with Spanish schools.	Very attractive are San Andrés Xecul (a yellow church), San Simón and San Bartolo.
Independent traveler to Quetzaltenango is 60%. They stay 1-2 nights.	For cultural orientation in Quetzaltenango: there is an idea to introduce "Tours of Conquest". The tour content would be to visit historic places of war between Pedro de Alvarado and Tecum Uman such as las Hajas, Uscos del Parí and Okitepeque. Some other possibilities for the area are: Glass factories in curul, marimba music in San Juan Ostuncutz, the first church in Central America and weaving in Sacarja and religious ceremony at Laguna de Chicabal.
95% young people (20-35 yo). Backpackers. Mainly students	Although Cobán is abundant in natura resources (including indigenous culture), INGUAT takes no interest on it. Cobán don't even has an Information Office in the city.
Europeans arrive in couples. Young people ecotourism oriented. Once in a while a group.	
Business people; seminars and NGO's people; families with children from El Salvador (they look for nature, tranquility). At El Salvador TO do offer Alta Verapaz.	Candelena, Lachua Lake, Chixoy Hidroelectric (reservoir for fishing & marine activities jai-si, so forth).
Mainly young people from other Departments of Guatemala, Foreign backpackers and young individuals working for NGO's in training activities.	
Ages ranges from 20 to 60 YO.	Chichaja; Chivox.
Domestic: families (couples w/kids) middle aged, middle class. Foreign: Mexicans & Spaniards business travelers mainly. Salvadoran are families on vacation. Young backpackers	Chilasco water falls, Sachichaj Cánzite, Nachichaj, Abandoned lead mine in Caguapec, Chivox reservoir.

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

c	Location	Type of Business	Infrastructure necessities	Legal requirements to improve tourism activities
1	Flores, Patén	Tour Operator, transportation services & Hotel	Lack of information. Lack of infrastructure (roads)	He thinks visitors pays a lot of taxes. Leaving the country, corruption at border points.
2	Flores, Patén	Hotel	Roads to different archaeological sites	Tourism tax. Tourism sector is not agree with this tax. Private sector don't know allocation of this resources. We need to create tourism police organization.
3	Flores, Patén	Transportation company		
4	Guatemala City	Hotel	Guatemala needs a master plan to guide development as well as a budget. Master plan will establish Guatemalan infrastructural needs to take advantage of huge tourism resources it has.	Legal situation is important to stop crime. It seems that nothing stops tourist robbery.
5	Guatemala City	Airline		Civil Aviation law. To bring people Guatemala needs an open sky policy.
6	Guatemala City	Airline	Major hubs for European to Guatemala are Houston & Miami. Europeans fly to Cancun cause is very cheap. However to fly from Cancun to Central America is very expensive. There are some people coming from La Habana because there are direct flights from that city. Main market so far: backpackers.	He considers that government is not interested in developing new places to promote among tourists.
7	Guatemala City	Airline		
8	Guatemala City	Tour operator, Wholesaler, Transport	All border points (better and not corrupted procedures). Maintenance of road system which have to be improved.	Taxes: 20 % on everything. Eliminate visas from some countries (Rep. Dominicana, Former Soviet block, Asia countries, Singapore). Civil Aeronautic Law is trying to protect national carrier (TACA). However, he thinks it is useless cause there is nothing to protect.
9	Guatemala City	Transport	1) Airport in Guatemala City. Orientation and short runway are a main problem. He mentioned 3 minor accidents. Airport should be moved out the city.	Foreign investment needs a proper environment as well as a clear legal framework (Financial, security and taxes).
10	Guatemala City	Tour Operator	Hotel accommodation is concentrated in Guatemala City but there is a lack of good accommodation in other Departments -- rural areas--.	
11	Guatemala 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 service. TACA is not acting as a "flag carrier" because they even out air service to Guatemala something that affects Guatemala capacity to bring tourism. Museums opening time is also restrictive.	1) INGUAT Organic Law --now in the Congress-- is very old and requires to be up to date. 2) Guatemala needs an Open Sky policy. Domestic demand is not so strong as to be afraid of this. But to bring people is a different matter. In this context competition is a good matter for Guatemala. 3) Law to Promote Tourism Investment. Its core element is tax incentives. However, since 1998 they were eliminated. 4) Hotel categorization. Hotels decides by his own. That is problematic. 5) Guatemala also needs a good transport and Tour Operator/Travel Agency regulation.
12	Guatemala City	Tour Operator		
13	Guatemala City	Tour Operator	Cruise terminals in both sides: Pacific and Caribbean. Small Marina for yacht market in Livingston. Guatemala needs small (but very well designed) airports instead big airports (Los Frailes in Copán is an example). It requires imaginative design not huge amounts of money. A road between Villahermosa (Mexico) and Patenque - Guatemala via Belhel, Honduras is building a road that will easily connect. Puerto Santo Tomás (Guata) and Puerto Cortés (Honduras).	Civil Aviation law is a main issue.
14	Guatemala City	Transport		
15	Guatemala City	Hotel		
16	Quetzaltenango	Tour Operator	Hotels, restaurants, services in general.	
17	Quetzaltenango	Hotel		
18	Quetzaltenango	Tour Operator		Legal and institutional framework as well as coordination. IDEAEH, INGUAT, Ministry of Agriculture, CONAP, SEGEPLAN, INFOM, and other institutions come with ideas and questions but they don't come back. There are no rules for historic buildings. Municipality gives permissions to destroy buildings and they don't allow others to construct a wall or a bathroom.
19	Quetzaltenango	Tour Operator		
20	Cobán, Alta Verapaz	Spanish School		
21	Cobán, Alta Verapaz	Internet-café	A lot of infrastructure needed.	Local advice even for local investors in tourism business.
22	Cobán, Alta Verapaz	Hotel	1) Roads and their maintenance. At this biotopo the foggy weather is risky.	
23	Cobán, Alta Verapaz	Lodge		
24	Cobán, Alta Verapaz	Transport company	Improvement of access infrastructure (paving roads & maintenance).	
25	Cobán, Alta Verapaz	Hotel	Roads improvement, trash disposal system in Cobán	none
26	Cobán, Alta Verapaz	Lodge	Access roads	
27	Cobán, Alta Verapaz	Tour Operator		

Financial supports required	Human resources development	Participation in conservation efforts	Selling methods
			STP representatives participate in Fair and Road Shows (Berlin, Madrid, etc.)
	A lot of training is needed to improve language skills and service. Human resources is a difficult matter in Peten. Lot of rotation in hotels. Peten youth visualize tourism work as a supplementary activity. Efficiency is low. Wages: Room maid and front desk: 1,100 Qm; Manager: 5,000 Qm.		
Each department needs to create roads & Inns (paradores) and nice restaurants. Government should support this investment.	More or less. Tourist guides should be trained to be very professionals. Tour guides are good but Guatemala requires a high level school to ensure quality. Guatemalan are kind people this is also a natural resource. They just need to know how to handle tourism.	They work with community in a case to case basis. Christmas by example, together with Copa and Continental, they offer meals, candies and toys to poor people. They participate in some initiatives (free tickets). They also sale low fares to local people.	INGUAT should pay more attention to cenote promotion request. They are selling Guatemala as a product. They use internet and participate in tourism fairs and events.
	Guatemala is improving in this sense. Universities now have courses oriented to train people in tourism.	no	There is a lot to do (she compares Guatemala with Costa Rica that has done an excellent marketing job).
	Lack of human resources to cope with tourism professionally.	When specific request is made. They support cultural activities (museums).	The send a Newsletter every month. It has been a very effective promotional tool. People even ask for it. They go twice a year to LA & Sico to promote Guatemala among TO & Travel Agencies.
Alfa and Beta Verapaz have good conditions to develop a natural tourism product. However they require support.	People working in the tourism field in Guatemala are mostly practical. But it is 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.	Guatemala promotes only 4 products. Other are forgotten.
Anything that strengthens educational activity. INTECAP. Private and public university level. Guatemala needs a lot more professionals in this field.	Guatemala needs a lot more professionals in this field.	They helped financially to conduct EIA studies.	INGUAT has no stable strategy based on the community. New administration should set a defined strategy to achieve the goals. Guatemala should consider to promote 3 star hotels. They would be more suitable for domestic tourism which is very important for tourism activity in the future.
			Airlines holds seminars in the USA for Tour Operators, hotel people and other travel related persons. They also publish every year a magazines related with Latin America.
	People needs to be trained to receive tourism. Guatemalans need to be more open (?) to welcome tourism.	They support people to conserve nature at Cerro Cobuc in Tikal and Cerro San Gil in Izabal lake.	The company participates actively in fairs. They undertake thematic festivals.
			Although the most promoted places are Tikal and Antigua, they promote Spanish school among universities.
A lot of tourism activities requires support specially small and medium enterprises.	They require training (they train their own people).		Foreign arrives because "Lonely Planet". They only mention Semuc Champey and there are other resources. No info on other attractions. First contact is Panajachel and Antigua. They advertise in co-op with other organizations. Magazines, so forth.
			They have an international recognition name. A web-page and are in the INGUAT directory (sometimes they send people to be lodge). Social contact with radio broadcasting.
Educational & training activities requires strong support.	It is required up to date training for executives and government officials.	no	Brochures, personal contacts, Web Site Chamber of Commerce (it doesn't work well), Tourism Commission in Cobán. Cobán and his attractions requires internet exposure.

Table 1.3 Record of Interviews with the Guatemalan Travel Trade (5)

c	Location	Type of Business	Tourism images and advertisement concepts	Negative feedbacks from customers
1	Flores, Petén	Tour Operator, transportation services & Hotel	The whole Guatemala although there are people that prefer archaeology.	Little assistance from tourism authorities. Lack of information. Lack of infrastructure.
2	Flores, Petén	Hotel		
3	Flores, Petén	Transportation company		
4	Guatemala City	Hotel	He goes back to a master plan. There is no clear image of Guatemala whom has a lot to offer. This have to be turn to Guatemala advantage.	Security is a big issue.
5	Guatemala City	Airline	Guatemala needs to improve image.	Security. They are sometimes afraid of conditions.
6	Guatemala City	Airline	Guatemala sells traditional indigenous people. A current video presents the variety of country's tourism resources. This is good. Guatemala has a lot to offer within a reasonable small area.	None
7	Guatemala City	Tour operator, Wholesaler, Transport	INGUAT people has a very limited vision of tourism due his lack of experience in travel. They don't know what other countries do in this respect. Slogans used to advertise Guatemala reflects this lack of experience.	High telephone cost; lack of information, poor driving conditions in Guatemalan roads. Some maps at INGUAT are sold (this should be free).
8	Guatemala City	Transport	Guatemala needs a new image to promote outside. Something with resources Guatemala has.	Taxes in Guatemala are high.
9	Guatemala City	Tour Operator	INGUAT has to diversify tourism image of Guatemala to include different tourism resources.	
10	Guatemala City	Association	1) Guatemala has not image at all. Foreign markets are not aware of Guatemala as a tourism country. 2) Guatemala promotes only 4 products: Tikal, Antigua, Chichicastenango and indigenous culture.	
11	Guatemala City	Tour Operator		
12	Guatemala City	Tour Operator	Guatemala needs to develop tourism products with identity (local flavor) in terms of images and tastes.	No special complains. Sometimes they complains about unprofessional attitudes.
13	Guatemala City	Transport		
14	Guatemala City	Hotel	Guatemala needs more promotion to let the world know the Guatemalan resources. Foreign people have a strong image of earthquake, violence, robbery and guerrilla (in spite of Peace Agreements).	
15	Quetzaltenango	Tour Operator		Transportation is a main source of complains: lack of, or poor service. Taxes very expensive. Low flexibility to establish travel itineraries as bus transportation is concern. A minimum number of pax are required by local tour operations in order to arrange suitable transportation.
16	Quetzaltenango	Hotel		
17	Quetzaltenango	Tour Operator		
18	Quetzaltenango	Tour Operator		
19	Cobán, Alta Verapaz	Spanish School		
20	Cobán, Alta Verapaz	Internet-cafe	We should promote green - clouds - people.	
21	Cobán, Alta Verapaz	Hotel	There is no information and Verapaces image is very poor and negative.	Roads
22	Cobán, Alta Verapaz	Lodge		1) Public transport is very bad; 2) insecurity.
23	Cobán, Alta Verapaz	Transport company		
24	Cobán, Alta Verapaz	Hotel		Area requires better restaurant services; Cobán requires a 5 star category hotel for domestic tourism.
25	Cobán, Alta Verapaz	Lodge		
26	Cobán, Alta Verapaz	Tour Operator		
27	Cobán, Alta Verapaz	Tour Operator		

<p>Requisitos to INGUAT and the government</p> <p>INGUAT has to work in tourist security & protection. More information</p>
<p>a) Total does not have a tourism plan; carrying capacity is not set; b) Local government does not have a tourism plan; they should introduce a priority scheme; c) There is a lack of "standard hotels" in Peten.</p>
<p>Work under a Master Plan (including infrastructure and a marketing plan). Tourism police outside the city; Education (how to deal with tourism) even in indigenous communities. Bring specific Tourism Wholesalers of different countries (they would evaluate what is needed). INGUAT has to work in destination ambience (garbage is a big issue). INGUAT should be private; Government should work only in statistics gathering. Continuity. Consistency of products and planning. That's why INGUAT should be private: ensure continuity (with governmental supervision) and planning.</p> <p>Tourism activity needs close coordination. Better communication process. Set up objectives and organization; respect individuals and private efforts. Guatemala needs to expand air routes. She thinks Europeans flying to Caribbean can be attracted to Guatemala. Cancun, Santo Domingo & Puerto Rico are additional options.</p> <p>Promotion and participation should be improved. International activity and planning is very urgent.</p>
<p>INGUAT people need training. They should be high quality well paid experienced professionals. They should be marketing oriented. Continuity of programs is required to improve activities. Guatemala has to specialize in archeological and cultural tourism. INGUAT people should get closer to industry representatives. Tourism industry has to be handled with ethics. Everybody has to understand limitation Guatemala has. Lack of confidence between public and private sector. Lack of unity among travel industry. Co-op for destinations. Increase hotel & air service. Keep tourism buses in good condition.</p> <p>INGUAT needs: 1) to be more involved with tourism in Guatemala; 2) talk more with customers; 3) create a system to measure and evaluate tourism; 3) use financial resources in a proper way.</p>
<p>Advertisement in Mexico could be good due the amount of foreign visitors coming from Cancun. Guatemala is often sold together with Mexico and Cancun. The limited budget in promotion & advertising should be oriented to the most beneficial market/method.</p>
<p>1) To keep coordination among different participants (public & private) in order to avoid isolated efforts. 2) Strong communication with related public agencies in order to get better coordination with private entities. 3) Improvement of statistics. Guatemala doesn't have adequate statistics for decision making (by example, air service market is not included in statistics; if even hotel sector demands statistics. They are willing to give information - at least big hotels. Chamber of Commerce has an initiative in this respect). 4) Improve coordination with municipalities, defining very clear set of responsibilities and priorities, to avoid future conflicts. 6) INGUAT should define priorities but there are no criteria to define what should be included in those priorities. This led to conflicts.</p>
<p>Security problem is a very important one. INGUAT should take this very seriously. Apparently, INGUAT listen to private sector. However, they do nothing else. In order to reflect private sector opinion, monthly meeting with each association should be establish.</p>
<p>Mundo Maya World is losing a lot of opportunities. Guatemala need to relax opportunities. Lack of unity in the travel trade is a very important issue. It is very important to have a single or multiple orientation: back to education.</p>
<p>INGUAT is making a so, so promotion. They should be more aggressive in campaigns to lure USA and European market. They have money!! (10% of airfare tickets sold in Guatemala).</p>
<p>INGUAT should make efforts to get rid of criminality. Guatemala should increase promotion.</p>
<p>INGUAT allocate mainly for promotion and little for development. INGUAT's office at Chetzaltenango is just an information center and don't represent INGUAT.</p>
<p>INGUAT should allow displaying private company's brochures at their office. INGUAT should work in infrastructure and services in major tourism sites.</p>
<p>INGUAT has to participate more closely with Coban tourism industry. They should open an office in Coban for information and promotion. INGUAT should promote different resources (not just Champsey). There are a lot more.</p>
<p>Advertisement for Coban in English. A Web Page or a link with Coban resources and services.</p>
<p>INGUAT should promote Las Verapaces. 2) Promote access roads to tourism resources; Even people from Coban don't know all resources they have. Farm trip for travel industry (foreign & national).</p>
<p>INGUAT should be more cooperative to private sector and other organizations. Promote Small and medium enterprises; Promote small as much as big companies.</p>
<p>Increase promotion of Semuc Champey and other Coban's tourism resources; improvement of infrastructure (paving & maintenance); improvement of tourism's security establishing check-points at several moving locations.</p> <p>A more cooperation and coordination behavior among INGUAT & tourism industry.</p>

Table 1.9 Record of Interviews with the International Travel Trade (1)

c	Location	Type of business	Field of specialization	No. of Employees	Customers' origin: foreign/domestic	Increase/decrease	Geographic areas
28	Dallas-Fort Worth, USA.	Tour Operator/Wholesaler.	Wholesale & consolidated business		USA	USA market to Europe is mature and growth rate very slow. Latinamerica, after so many troubles in the socioeconomic & political situation, is improving the flows into the region cause yet market is immature.	
29	Los Angeles, USA	Tour Operator/Wholesaler.	Corporate and leisure	6	USA: 40%		Europe, USA (40%), Canada (they are contacted via Internet). Major market for Guatemala: Germany, Italy, USA.
30	Los Angeles, USA	Tour Operator/Wholesaler.	Tour Operator/Wholesaler.	3	USA	Flow to Guatemala (including every year).	Market for Guatemala: USA.
31	Los Angeles, USA	Tour Operator/Wholesaler.	Tour Operator/Wholesaler.		USA (mainly) but also from Canada and Mexico.	For Guatemala, major market USA and Canada. Their market has decrease since Todos Santos event.	USA (mainly) but also from Canada and Europeans (asking for a cheap package) and Mexico (mexican honeymooners are accessing to the TO). All of them have access trough internet.
32	New York	Tour Operator/Wholesaler.	Tour Operator/Wholesaler.	130	USA, Japanese expatriate (Canada). Japanese companies and families of their staff are principal clientele. Groups of house wives are quite important for the holiday market.		Japanese families living in the USA
33	New York	Tour Operator/Wholesaler.	Tour Operator/Wholesaler for Latin America. ISRAHWORLD subsidiary with worldwide covering.				
34	New York	Tour Operator	Wholesaler (Subsidiary of an airline)		USA	Popularity of Central America is declining (even Costa Rica's popularity was affected by murder cases reports).	USA
35	New York	Tour Operator	Central America in particular Costa Rica		USA	Belize popularity increased in recent years thanks to active promotion activities. It provides beaches, scuba diving, nature areas and caving. Destination with beach is easier to sell.	USA
36	New York	Columnist	Articles for newspapers about Latinamerican art & literature. A former travel agent specialized in Maya Route.			They are now out of business as travel agent. At the beginning they should expand the market with to combine Copan, Honduras and Arch. Sites in Guatemala.	USA
37	Tokyo	Tour Operator	Mexico and Latinamerica		Japanese: 100%	Before Todos Santos Incident, Siyu Ryuko (TO directly involved in the situation) was trying to introduce Yaxchilan and Mexican-Guatemala border areas to Japanese market. The incident stopped (or suspended) their involvement in Guatemala. Guatemala was withdraw from Japanese TO brochures.	Japanese
38	Tokyo	Travel Agency			Japanese 100%		Japan
39	Tokyo	Travel Agency			Japanese 100%		Japan

Length of stay	Seasonality	Principal problems to promote tourism	Strengths of Guatemala
		Information on Central America as a risky region to travel (exception of Costa Rica). Security is a problem in Guatemala: Tikal & Antigua no problem with day light but unsafe at night.	Guatemala has abundant tourism resources and a high potential.
Length of tours: 7-10 days. Prices under \$USD 1,000. (Prices of package tours from USA are more expensive than similar in Europe -double-. In Spain and France: 1,000 -1,500 while in USA \$ 2,000).		Security matters (american customers are very sensitive to it. They check security aspects via Internet). Low quality of customer services at airports, air service (National flag -TACA- gets europeans no americans), lack of comfortable hotel accommodation, local travel agents, restaurants, etc. Speak only spanish/multi-bilingual required (at least bilingual); cold sense of arrival at airport (in contrast w/ Mexico & Costa Rica).	Guatemala has everything for tourist and business people. Guatemala has a lot of treasures. Unique geographic features (variation of altitude and scenery), mild weather throughout the year (not very cold and not very hot). Cultural Interest (ethnic culture and handicrafts variety). Guatemala has a bright future.
Length of tours: 8 days. Prices under \$USD 1,540 including air fare from MIA or LAX. American customer takes around 1 week for travel.		Insecurity, lack of Infrastructure.	Tikal and Mayan ruins; People; Handicrafts. Open air indigenous markets. Cultural tourism is more important than nature tourism in USA market. Student market is very cheap.
Length of tours: 7-10 days. Prices range from \$USD 1,000 to \$ 1,800 per person.			Guatemala has a big diversity that can be interesting: Archeological sites, Colonial towns, indigenous people and culture and handicrafts.
One week visiting Antigua, Chichicastenango, Panajachel & Tikal. Brochures in two parts: a) suggested itineraries (itineraries for 10-14 days typical for american customers) and b) Region by region section (travel components customizable for clients). Guatemala is only listed in the b) section due its limited demand.			
Length of typical itineraries for Central America is 7 to 10 days. Their customers spend 7-8 days in Guatemala visiting Chichicastenango, Atitlán, Antigua & Tikal. If Copan and Honduras are included, the length would be 10 days. There are not many variations of itinerary.			Guatemalan's coffee and cacao are high in quality and cannot be missed. SPA is also an interesting tourism objective. They can be supplementary tourism attractions.
Central America: 10-14 days. Costa Rica is often combined with Belize or Guatemala. USA market considers air service when travel time exceeds 2 1/2 hours. 4 travel time is acceptable when route is scenic. American market cares about long bus trips (unlike europeans who don't care too much).			
Americans usually spend 2 weeks in Central America. 3 weeks is the maximum stay length of stay.	There are 3 travel seasons: Christmas, Easter and Summer holidays.	Honduras government has attempt to hinder tourism flow between Guatemala & Honduras looking for a longer staying at Honduras. Mundo Maya has been challenged by this actions.	
Japanese market spends 1-2 weeks to travel in Mexico and Central America.		According with Japanese Ministry of Foreign Affairs, Chiapas is NOT a recommended destination for tourist (although problematic area is reduced and San Cristóbal de las Casas and Palenque are secure locations). This makes difficult to sale Mundo Maya. Facilitate procedures for vehicles crossing the boarder is vital for tourism development in the Maya region. Scarcity of good Japanese speaking guides is a constrain to sell Guatemala. (They used mexican guides to cope with this situation).	
Longer itinerary is 22 days to Antartica. Tour itineraries longer than 13 days are difficult to sell. 8 days tours are very popular. 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 Belize. They don't offer itineraries combining Mexico and Guatemala.			
Longer itinerary is 22 days to Antartica. Tour itineraries longer than 13 days are difficult to sell. 8 days tours are very popular. 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 Belize. They don't offer itineraries combining Mexico and Guatemala.			

Table 1.4 Record of Interviews with the International Travel Trade (2)

c	Location	Type of business	Weaknesses of Guatemala	Principal tourism products
28	Dallas-Fort Worth, USA.	Tour Operator/Wholesaler.	Security issues	Europe: 60%; Latinamerica: 20%. They sold package to Guatemala till 1996. They stopped due his new business strategy (just wholesaler of air tickets. They might go back to packages). Rank in sales are: 1) Costa Rica; 2) Guatemala (2-3 thousand customers per year).
29	Los Angeles, USA	Tour Operator/Wholesaler.	INGUAT and TACA seems ignorant of american market. They seem to be satisfied just with european market.	vacations & business; corporate (90% of the products). Educational. Major areas: Mexico, Central America, Guatemala share in products: 20%.
30	Los Angeles, USA	Tour Operator/Wholesaler.	Insecurity, lack of infrastructure; no competitive tour package price (To Guatemala \$ 600 (mostly shared by airline). Costa Rica (\$ 440 from LAX, \$ 350 from NY). Transportation: need to hire local drivers; Car rental not 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, Ecuador, Chile, Bolivia. Favorable destinations are Costa Rica: 90% in Central America) Chile. Before travel Guatemala USA market would travel to Belize, Panama, Honduras and then Guatemala.
31	Los Angeles, USA	Tour Operator/Wholesaler.	Major offer is cultural which seems to be very weak segment at the present. Poor service level in Guatemala (americans require standard services. They can complain of services). Little positive reinforcement of Guatemala as a good destination. Too slow reacting to negative factors. TACA sells unreasonable high price air tickets.	Central America, South America. Guatemala share in TO products (10% or less). Mostly SSS interest. Small market for nature and cultural destinations (including archeological; in this field Egypt is a main competitor). Mundo Maya archeological sites are too dispersed and similar to travel on the route. Considering size of USA market, a good marketing strategy can expand this segment.
32	New York	Tour Operator/Wholesaler.		Business, incentive and holiday trips in and out USA. Packages of the Look brand for the Japanese market. For Guatemala there are 2 different itineraries: 1) USA-Guatemala; Guatemala-Antigua-Guatemala; Guatemala-Flores-Tikal-Flores-Guatemala; Guatemala-USA; 2) USA-Guatemala; Guatemala-Antigua-Guatemala; Guatemala-Flores-Guatemala; Guatemala-Cobán-Cobán-Quirigua-Guatemala; Guatemala-USA. In Latinamerica, Brazil is the most popular. The company introduced a bus/rail trip of Cooper Canyon 8 days. According with this, it seems that they prefer to stay in Guatemala city.
33	New York	Tour Operator/Wholesaler.	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) suggested itineraries, and b) Region by region section (travel components customizable for clients). Guatemala is only listed in the b) section due its limited demand. Guatemala 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 (Guatemala) separately.
34	New York	Tour Operator	Guatemala tourism image is not favorable. It attracts only a narrow market. Guatemala is not regarded as a secure destination.	Worldwide package tours (air fare operated by United). At Latin America and Greece Division of this company, Mexico and Greece are the most popular destinations. Guatemala share 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.
35	New York	Tour Operator		In Central America, Costa Rica is best selling destination. Belize comes 2nd and Guatemala 3th. Belize popularity increased in recent years thanks to active promotion activities. It provides beaches, scuba diving, nature areas and caving. Destination with beach is easier to sell. Typical itinerary in Guatemala is 7 days (Antigua 2N; Chichic 1N; Atitlán 2N; Tikal 1N).
36	New York	Columnist		"Maya" is the most important tourism concept in the US both for Guatemala & Honduras. Colonial is only supplementary to archeological tourism. Arts & handicrafts in Guatemala have a high quality and important for tourism as well.
37	Tokyo	Tour Operator		Maya World. Bus tour is a common and preferred transportation to visit archeological sites, at least in Mexico.
38	Tokyo	Travel Agency	Lack of good Japanese-speaking guides is a constrain of Guatemala. Good English-speaking guide is much better than poor Japanese-speaking guide. In contrast there are good Japanese-speaking guides in Mexico. At this moment, Japanese Foreign Affairs Security Recommendations mean a great constrain to introduce competitive products to the Northern part of Guatemala.	They have a travel membership system (300,000 customers in 2000). Europe is the best safe destination region but they always include worldwide destinations in their brochures (send periodically to them) to keep clientele satisfied and part of the system.
39	Tokyo	Travel Agency	Lack of good Japanese-speaking guides is a constrain of Guatemala. Good English-speaking guide is much better than poor Japanese-speaking guide. In contrast there are good Japanese-speaking guides in Mexico. At this moment, Japanese Foreign Affairs Security Recommendations mean a great constrain to introduce competitive products to the Northern part of Guatemala.	They have a travel membership system (300,000 customers in 2000). Europe is the best safe destination region but they always include worldwide destinations in their brochures (send periodically to them) to keep clientele satisfied and part of the system.

Psychographics characteristics	Potential tourism attractions	Infrastructure necessities	Legal requirements to improve tourism business
Main safes customers to Guatemala are church members. Compared with other Central America countries, notable group travel by this market. (Costa Rica has a very clean & safe image where women can travel to -althought kidnapping incident at Nicaragua border-).	Costa Rica has beaches but Americans don't stay long there. Combine activities with nature. Americans prefer Caribbean if they want beaches. Americans are looking for different destinations. If security problems can overcome, Guatemala would receive potential travelers (specially those who have been already in Costa Rica).		
The most active ages, occupations: 21-45 yo. They travel in couples. Prices under \$USD 1,000. American customers prefer home carriers (United, AA). Religious tour is growing.	Favorable destinations: Central America. Guatemala resource: very specific. No other countries. Now target destinations would be "Ethnic village".	Mexico and Costa Rica invest money for infrastructure and marketing. Guatemalan activities are hardly seen.	
The most active ages, occupations: average 40 yo and older. They travel individually. USA customer chose among principal destinations basing their choices: First) Costa Rica or Panama or Mexico; Second) Chile & Argentina; third) Guatemala. Costa Rica & Mexico are dominant (than Guatemala) in Central America tourism cause their professional activity. Prefer security in political and criminal ambiance and comfort. If there are accidents they cancel. Very conservative tourism. Europeans more adventurous. Americans pay money for good services in accommodation & transportation. Prefer american hotel chains. Don't like typical local food. Shopping is a must for them. They don't care about quality like handmade goods. Village tourism.	Market general orientation: Culture, Archaeology, history and nature. Guatemala has a lot to offer: First) Archeological mainly (Tikal the best), Second) Indigenous people; Third) Handcraft (the company promotes hand weavers groups).		
The most active ages, occupations: middle age. According with customer they travel individually or in groups (2-3 persons per group). Big tour group has not been successful in Guatemala. Americans comfortability oriented; Europeans have a more adventure orientation (more willing to explorations than americans). Americans wants a secure travel and don't want to lose money or time. Baby boomer usually plans 2-3 vacation a year. New X generation is culture oriented. They like driving by their own in foreign countries (Costa Rica has a good condition for this and recognized as a "safe destination"). Many religious tour visiting Guatemala in Holy Week and Christmas processions (reservations one year in advance).	Favorable destinations are so far: Costa Rica, Belize. Guatemala is promoted but not easy product to sell. Guatemala is sold in USA market but not in a top position. Central America is like a provincial destination in tourism.	Insufficient road condition.	
The interviewee personally prefer small-scale luxury hotels. An important aspect of luxury is the number of employees at an establishment. Luxury hotels in Asia employs a large number of locals people who are assigned to small specific jobs, which is successfully translated into "good" services. He doesn't know this type of hotels in Latinamerica.			
	They know there are flights between Palenque and Flores. They don't know, however, local tour operators who can operate the trip.		
Their customers spend 7-8 days in Guatemala visiting Chichicastenango, Atitlan, Antigua & Tikal. If Copan and Honduras are included, the length would be 10 days. There are not many variations of itinerary. Although already aware of Mundo Maya concept, Guatemala is rather an independent destination for USA market.	Retired people spend longer time (even more than 2 weeks) for trips than average Americans. They travel during off-season. They will increase their importance in the future with retirement of baby boomers. If Guatemala wants to sell Mundo Maya this is the market to approach. Selling the typical itinerary has priority over diversifying its tourism product, at least, in the USA market.		
Emphasis on tailor-made tours for up-market clientele rather than tour packages sale. Their clients use 5 star hotels in Guatemala.	To combine Tikal with Palenque would be interesting. The problem is to know how arrangements can be done (they work with PTA Maya and Clark Tours in Guatemala). SPA is an important objective in the USA market due consumers' interest in health. Guatemala may have opportunity in this market.	Hotels in Guatemala are better than those of San José.	
	Cancun-Tikal packages may be quite appealing to the Japanese honeymooner market. Cancun popularity has grown significantly in recent years due to his air fare and "female office workers" market -- which is replacing honeymooner -- could be very attractive. Mexico Kankou is making efforts among Japanese market to introduce Playa del Carmen which is a beach destination close to Guatemala (and should take advantage of it). Visiting World Heritage sites (WHS) is a fashion in Japan. Guatemala has a good potential for growth in this context (as an example: Continental Airlines introduced a promotion campaign of Mexico focusing on its WHS with a very positive impact).		
Focus on corporate market and large scale tailor-made group tours. Since market stagnation early 1980's, they are actively participating in the growing tour packages market (first: investing in newspaper ads for inexpensive tours; later, organizing participants into membership system to make them repetitive clientele for not-so-expensive tours. Customers are people over 50 yo. More than 50% of male customers and 30% of females, have a job.	Compared with Costa Rica, Guatemala has more mass-market appeal. Costa Rica is for nature lovers and SIT markets. Those who are repeat visitors to a destination, prefer to travel only within a country or an area intensively, rather than combining with other countries or areas. Traveling for 4-5 hours by bus is acceptable, provided that scenery is good. 7 hours trip may be tolerable but they generally avoid such a trip (availability of clean toilets is crucial to use a bus). They look for rooms w/private baths as best as they can. Rooms without private shower may be tolerated for one night or two. Japanese Foreign Affairs Security Recommendations mean a great constrain to introduce Palenque-Tikal which may be a very competitive product.		
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Table 1.4 Record of Interviews with the International Travel Trade (3)

c	Location	Type of business	Financial supports required	Human resources development	Participation in conservation efforts	Selling methods	Tourism images and advertisement concepts
	Dallas-Fort Worth, USA.	Tour Operator/Wholesaler.					
28	Los Angeles, USA	Tour Operator/Wholesaler.		Need for education on customer services.		Proximity to INGUAT; Open dialog with INGUAT and travel agencies.	Promotion activities of INGUAT should be improved. An idea his to hire foreign advisers.
29	Los Angeles, USA	Tour Operator/Wholesaler.				INGUAT should change the way it is promoting Guatemala. Well planned and participation in trade shows are highly recommended. Also very recommended a regular contact with agents (even through post cards) at the beginning and preparation of a full data catalog in the next step.	Tourism image of Guatemala is currently as a part of Mexico. Central America image has already been confirmed (Mexico and Costa Rica are in the top). Belize has become popular. They give a very positive image among USA market. They recovered tourism inflow soon in spite of Mitch Hurricane.
30	Los Angeles, USA	Tour Operator/Wholesaler.		INGUAT should encourage tourism education.		Too concentrated in traditional resources. Little has changed in 11 years they have been selling Guatemala. Slow INGUAT reactions toward Travel Agents. Flexibility in bus transport insufficient. 5 years ago, Guatemala and Belize were bound together. They are split now. Belize is popular cause tropical Caribbean style.	Cultural tourism. INGUAT don't know marketing and promotion (improvement of money allocation). More active contact with travel agents. Guatemala needs direct promotion to consumers. They always watch Internet and remember bad images. It is very difficult to remove them from memory). Worldwide promotion.
31	New York	Tour Operator/Wholesaler.					Guatemala has an image of dangerous or adventurous country. His personal images of Latin America countries is negative in general (seem to be influenced by his perception of immigrants workers in NY).
32	New York	Tour Operator/Wholesaler.				In the past, Guatemala's popularity started to grow. Negative publicity came and boom stopped. Since then on, no negative publicity has been taken place. This is a right time for Guatemala to launch a campaign to firmly establish itself as a tourism destination.	
33	New York	Tour Operator				Costa Rica invested in tourism promotion. This action secured his current market position as an ecotourism destination.	Guatemala tourism image is not favorable. It attracts only a narrow market. Guatemala should make efforts to remove its tourism image of dangerous destination.
34	New York	Tour Operator				Belize popularity increased thanks to active promotion activities. It provides beaches, scuba diving, nature areas and caving. Destinations with beach is easier to sell.	Guatemala has plenty of tourism promotion materials such as CD/ROM and brochures. It is better compared with other countries of the region. It would be ideal if Guatemala provides human services as addition to materials.
35	New York	Columnist				It is important to register a name in the Yellow Pages because it is easy for customers to know what is the product about. The "Maya" name is very important. The same goes for Internet. INGUAT's current URL is not very easy to memorize.	Latin America countries rarely produce good brochures. Guatemala is an exception and is slightly better in this sense. The interviewee hopes to open a museum in NY to introduce cultures and arts of Mundo Maya. It would also strengthen the cultural identity of those who have ancestry in the region, but also function to improve regional image and promote tourism.
36	Tokyo	Tour Operator				Fam trips are useful to remove "dangerous country" images from Japanese tour operators and travel agents, in particular, after Todos Santos incident. Staff's enthusiasm of Guatemala officials are important to create a favorable image of the destination (Cuba is quite successful with his staff's enthusiasm and it shows how tourism promotion activities, including	Mundo Maya countries should consider launching a joint tourism promotion campaign in Japan.
37	Tokyo	Travel Agency					
38	Tokyo	Travel Agency					
39	Tokyo	Travel Agency					

Negative feedbacks from customers	Requests to INGUAT and the government
	Security preconception should be overcome with fantrips (not only TO but also Travel agents and Magazine writers).
	INGUAT has no contact with travel agencies. They need a lot of things from INGUAT. INGUAT should be interested in "ethnic" travel agencies, but also to contact non hispanic oriented travel agencies. Travel Agencies don't know how to contact INGUAT (he has customers who have interest on textiles).
	Promotion materials (small things to give away in tourism promotion). Participate in trade shows. Airlines collaboration. Promotional airfares to Guatemala. Brochures distributed by INGUAT are beautiful but this is insufficient to promote (not so effective). INGUAT needs more interaction with TO. Local participation with agencies. Promotion by internet is cheap but effective.
Inflexible bus transportation schedules. Insufficient road condition. Guatemalan Tour Operators are very slow reacting in their actions (by example: Guatemalan TO offer products two months in advance. Market make reservation 6 or 7 months earlier). They don't know about services: bad altitudes, drunk-driving in the morning. Local people have a very simple mind.	Develop more sun and sand destinations. Increase materials for promotion. More positive reinforcement. More infrastructure: Get creative; concentrate in cultural tourism (Tikal and Chichicastenango are important). Participation in travel fairs: preparation of unforgettable small local for the participants (additional souvenir a plus). Constant promotional activity is more recommendable than big trade show participation. Although INGUAT was very active in our business, few year ago, started more promotion to retail market (TO business lost interest). Increase mutual cooperation in marketing.
	This is a right time for Guatemala to launch a campaign to firmly establish itself as a tourism destination. What is needed are publicity and advertisement toward consumers (not the seminars for the travel trade).
Complains are very rare: hotels are good in general.	Guatemala has to express government commitment for tourism development. Otherwise, the travel trade, including hotels and tour operators won't run the risk of investing in, and sending tourist to, the country.
	INGUAT should place more emphasis on "soft" aspects of tourism promotion. Tourism promotion activity should be toward consumers rather than travel trade. It is recommendable to install billboards advertisement rather than ads in travel trade magazines.
	Articles in New York Times, Sophisticated Traveler, Conde Nest Traveler have great influence in people, particularly affluent professionals, to choose a destination to travel. Guatemala should establish a public relation office to promote positive media coverage. This office should have US-educated professional staff.
Hotels in Guatemala are good an there is little problem on this.	Travel trade lacks of information of Guatemala. Tour Operators and Travel agents that sells Guatemala and the Mundo Maya region, were welcoming tourism seminar held in Tokyo in May 16. It may be possible to charge an entrance fee if it is combined with a small concert of traditional music like marimba. It is important to conduct tourism promotion activities not only in Tokyo but also in major cities like Osaka and Nagoya.
	It is important for Guatemala Embassy to claim Ministry of Foreign Affairs to remove or modify its security recommendations to comply with more accurate security conditions in Guatemala.
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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.