

## **1.4. Supplementary Social Environmental Survey**

### **1.4.1. Objectives**

The objective of the supplementary social environmental survey is to understand the characteristics and social, economic and cultural dynamics of the selected communities in the Priority Tourism Development Areas (PTDAs). The survey sites were stratified based on gender, ethnic groups, age and other important strata defined by the community.

### **1.4.2. Survey Area**

The survey area covers six selected communities within the following PTDAs:

- Peten Department;
- Alta Verapaz Department; and
- Quezaltenango Department.

### **1.4.3. Contents of the Survey**

#### **(1) Main items of the survey**

The main items of the survey included the following items:

- Distribution and physical location of community including habitation, productive and recreational areas, infrastructure and resources distribution,
- Community organizations and their structure (internal to the community and within the larger regional environment),
- Population dynamics,
- Productive, recreational and cultural activities (daily activities, activities by day and week, and productive and cultural activity seasonality),
- Historical development of community,
- Type of economy,
- Cultural characteristics (spirituality, traditional ways of organization, customs, costumes, and others),
- Main economic, social and cultural interests, and
- Expectations and hopes for the future.

#### **(2) Survey stage**

##### **a. First stage: survey startup**

During the first stage, the sub-contractor elaborated on the design of the research in coordination with the members of JICA Study Team. Once the specifics of the survey were settled the sub-contractor and the assigned members of the JICA Study Team visited

the target communities as the first approximation in order to establish contact with the leaders and other actors of the communities.

**b. Second stage: fieldwork**

During the second stage, fieldworks of the community were carried out. Using appropriate participatory research tools, the survey team collected necessary information to develop community diagnosis according to the objectives as described above. Obtained information is expected to reflect genuine opinions and expectations of the target communities. JICA Study Team provided photographic cameras to the community so that they could use it to document the process, reflecting the everyday life of the community showing what was most important for them.

**c. Third stage: feedback and follow up**

During the third stage, JICA Study Team joined the survey team to visit the communities to expand the research in specific topics of interest that emerged from the previous stages. The survey team dedicated to the systematic classification and analysis of the collected data.

**d. Final presentation**

During the last stage, the survey team presented the final report, in which the information and results of all stages of the survey are included.

#### **1.4.4. Main Outputs and Use of the Survey Results for the JICA Study**

The survey results were used to deepen the understandings of the communities with tourism development potentials, and of their issues from socio-economic and cultural aspects. The survey results also contributed to identification of possible cultural tourism resources in PTDA, and provided a basis for the environmental impact assessment survey.

**(1) San Jose, El Peten**

	Descriptions and Characteristics
Economy	<ul style="list-style-type: none"> <li>• San José residents are involved in many economic activities such as, agriculture, cattle raising, fishing, water transport, commerce, carpentry, bricklayers, crafts, field workers and clerks. These activities have shifted over the years according to the demand.</li> <li>• The people in San Jose had engaged in chewing gum extraction, same as the residents of San Andrés, San Benito and Santa Ana municipalities. The activity ceased in 1978 due to the lack of market.</li> <li>• San Jose municipality has close relationship with the private sector, because many construction companies are hired by the municipality to carry out tasks.</li> </ul>
Economic and Social Activities	<ul style="list-style-type: none"> <li>• Most of the farmers in San Jose harvest corn mainly for their own consumption. One of the traditions taught by their ancestors is not to shake corn plant because it needs to be respected.</li> <li>• They keep the corn as it is, and they separate it only when they need to. This activity is usually done by women. They also cultivate orange, grapefruit and avocado.</li> <li>• During the whole productive cycle, the people practice Mayan ceremonies, one of the most important ones is, "cabeza del coche" or pig's head to call for water and a good harvest, which is held before the corn was sown. During this ceremony an animal is offered by individual or by family.</li> </ul>
Infrastructure and Services	<ul style="list-style-type: none"> <li>• 100% of the people have access to the water through common faucet.</li> <li>• San Jose has electrical supply to 100% of the homes and buildings.</li> <li>• San José has no drainage system and rainwater flows into the lake. Most of the homes and buildings have septic tanks or latrines.</li> <li>• San José has developed communications services. They have private and public telephone service, Internet, fax and cable T.V. services, provided by a local service provider named Tania Cable Vision.</li> <li>• San José has two means of access: by water and by land, which closely connects San Jose to other Petén areas.</li> <li>• Rental boats with overboard motors operate between San Benito from 6:00 AM until 6:00 PM. Navigation on the lake can be dangerous during the dry season due to strong winds that have caused accidents.</li> <li>• There is an asphalt road of about 1.5 kilometers, which connects San José with Nuevo San Jose.</li> <li>• Until 1998 San Jose had only one healthcare center, which opened in 1972. It has been managed by an Auxiliary Nurse that belongs to Flores, Santa Elena District.</li> <li>• In case of emergency, they have to travel to the San Benito Hospital located some 23 km away.</li> </ul>

Culture and Religion	<ul style="list-style-type: none"> <li>• The majority of the people in San Jose are "non indigenous," which represent a 68% of the total population.</li> <li>• Use of Mayan language is the criteria for the above figure to define "indigenous" and "non indigenous." Mr. Pablo Coot Tesucún, representative of the Mayan Language Academy, argues that language should not be the only criterion that defines the Maya Itzaj ethnic group.</li> <li>• According to the above organization, 90% of the population in San Jose must be considered indigenous belonging to the Maya Itzaj ethnic group.</li> <li>• It is estimated that 10% of the Mayan Itzaj population speak the language. Since 1991 there is a project to recuperate and preserve the language.</li> <li>• Most of the people belong to the Catholic Church, There is a small group of people who belong to the Mormon and Evangelical Principe de Paz churches.</li> <li>• However, no matter what religious practice they observe, they maintain their own ancestral ritual practices such as prayers for rain and permission to the land to cultivate the "sacred corn".</li> </ul>
Community Organization and Attitudes	<ul style="list-style-type: none"> <li>• San Jose has a traditional social organization mainly formed by locals.</li> <li>• The municipality has registered a Pro-Improvement Female Association to preserve medicinal plants and a second degree organization which holds all other organizations mentioned.</li> <li>• The people of San José are organized into different forms to get solutions to their problems. It provides an important base to achieve their economic, political, socio cultural and environmental goals.</li> <li>• There is an elder counsel, which is well respected in the tradition of the residents.</li> <li>• Even the appointed Mayor comes to the elders to seek for advice, even when their advice isn't taken into action.</li> </ul>

Source: Social Environmental Survey, JICA Study Team

## (2) La Felicidad, El Peten

	Descriptions and Characteristics
Economy	<ul style="list-style-type: none"> <li>• La Felicidad's economy centers on agricultural activities, to which 95% of the people is engaged.</li> <li>• Agricultural activities are characterized by the use of traditional sow and harvest methods (slash and burn).</li> <li>• The main crops are corn beans, and gible. There is some rice cultivation, but in very small areas and amounts.</li> <li>• Along with traditional crop cultures, mostly corn, this community's agriculture has been traditionally associated with other crops in smaller amounts such as beans and some pumpkin as well as gible.</li> <li>• Besides main agricultural activities, locals also developed other activities such as livestock, fishery, and forestry to compensate their income or for self-consumption.</li> </ul>

<p>Economic and Social Activities</p>	<ul style="list-style-type: none"> <li>• Some 20% of the people raises cattle, especially bovine, some raise hogs, goats and birds as a complement to their agricultural activities.</li> <li>• In 1998 the Program Sayaxché - La Libertad (PSL) started a project to encourage hog raising, which became unable to continue due to the lack of finance and ended without any positive results.</li> <li>• Some of the community residents are engaged in commercial fishing of the diverse species provided by the Pasión River.</li> <li>• Some of the residents engaged in fishing activities for self-consumption.</li> <li>• Some residents are also engaged in logging activities in smaller proportions and through special projects handled by CONAP.</li> </ul>
<p>Infrastructure and Services</p>	<ul style="list-style-type: none"> <li>• Piped water is not available throughout the community but the whole population has access to the Pasión River as well as two natural water springs inside the community, from which water is brought and stored in their homes.</li> <li>• There is also a common use well for water supply during the rainy season.</li> <li>• No drainage system is available in the community.</li> <li>• Neither electricity nor phone services are available. Residents travel to the municipal capital to make phone calls.</li> <li>• Out of the 8 km of unpaved road, only the half is suitable for travel all year round. The other half is only during dry season. There is another 8 km asphalt road towards the municipal capital.</li> <li>• During the dry season, there is a transportation service to Sayaxché; some pickup trucks travel daily to the municipal capital.</li> <li>• During the rainy season, transport is done by boat through the Pasión River. This water transportation service is not used much because of its high cost.</li> </ul>
<p>Culture and Religion</p>	<ul style="list-style-type: none"> <li>• Most of the people in La Felicidad are ladino. They are migrants from the eastern and southern parts of the country, who arrived during the 60's.</li> <li>• La Felicidad has four different evangelical denominations, either fundamentalists or neo-pentecostal such as Asambleas de Dios, Iglesia de la Profecía Universal, and Sana Doctrina Church.</li> <li>• There is still a minority of Catholics but they don't have a place to hold their services.</li> <li>• Evangelical churches have resident pastors or those from a nearby community. So they can have daily services.</li> <li>• Catholic Church doesn't have a proper meeting place and has no local representative due to the small amount of congregation. They prefer to go to the municipal capital.</li> <li>• Most of the success gained by these church denominations are their capability to progress and extend without financial assistance from any type of organization either national or religious, and to keep messages that are different from those from Catholic Church.</li> <li>• Since the majority belongs to evangelical churches, there is no Patron Saint celebration related to those traditional from the Catholic Church.</li> </ul>

Community Organization and Attitudes	<ul style="list-style-type: none"> <li>• There is no social organizations existing in the community. There is only a Pro-Improvement Committee and an Assistant Mayor.</li> <li>• As a general rule, all the organization structures are occupied by men only. Women are still being discriminated from any social activities.</li> <li>• Socially, evangelical churches are seen as a way to get out of their current marginal status both social and cultural, since they provide their members with the opportunity to be close and to attend regularly to their church activities.</li> </ul>
--------------------------------------	---

Source: Social Environmental Survey, JICA Study Team

### (3) Queja, Alta Verapaz

	Descriptions and Characteristics
Economy	<ul style="list-style-type: none"> <li>• Quejá's main source of economy is agriculture. They sow corn and beans, which were the legacy from their forefathers.</li> <li>• The people are under a high pressure for soil and natural resources, which drives them practice hillside agriculture.</li> <li>• Guatemalan government, in particular, the Department of Agriculture, Livestock and Food, did not developed methods to provide small-scale farmers with the necessary technology to make better use of their resources.</li> <li>• Some of the cultivated crops are sold in the markets in Santa Elena and San Cristóbal.</li> <li>• The people raise hens, chickens and turkeys.</li> <li>• There is no main commercial wood production, when someone within the community needs woods they chop it by themselves.</li> <li>• They sell their products to obtain additional income to purchase things they don't produce such as sugar, soap, rice, salt, tomatoes, peppers, fertilizers, clothing, shoes, school supplies, construction materials, meats, and to pay for their electricity bills.</li> </ul>
Economic and Social Activities	<ul style="list-style-type: none"> <li>• 96% of the economically active population is male, since female domestic activities are not considered as job. Female economic activities are poorly compensated.</li> <li>• The products harvested by the community are coffee, corn, pacaya, pepper, cardamom, oranges, and bananas, which are sold and for local consumption.</li> <li>• The main sources of income are from coffee and cardamom. The coffee harvested by the community is of premium quality.</li> <li>• They still keep the ancestral practice of sowing corn, beans and pumpkin, of keeping certain distance between grains and number of grains per sow.</li> <li>• They just recently introduced the use of fertilizers. It is a result of commercialization packages made by private institutions of technical supports during the 1980's.</li> </ul>

<p>Infrastructure and Services</p>	<ul style="list-style-type: none"> <li>• Only 23.8% of the households have a service of water at their homes, while the remaining 61% has access through common faucet.</li> <li>• In terms of sanitary services, not all the families have latrine services.</li> <li>• Most of the households have electricity.</li> <li>• There is no direct transportation service to go out of the community. In order to travel to different areas, the residents must walk towards Santa Elena Village, from where they take shuttles towards the Municipal Capital or other places that belong to Uspantán.</li> <li>• There is one good bridge along the road to Sierra Pampanché.</li> <li>• The road that leads to the community is of dirt. It connect Alta Verapáz with Quiché and Huehuetenango.</li> <li>• In terms of health, children are often ill with whooping cough, diarrhea, measles, chicken pox and parasites. These diseases can be prevented but they lack enough vaccination services. Besides they suffer from malnutrition and poor hygiene.</li> <li>• All these diseases are often cured by using chemical medicines or medicinal plants available in the region. There is no medical service inside the community. They are requesting for a health care center.</li> </ul>
<p>Culture and Religion</p>	<ul style="list-style-type: none"> <li>• The community has several special sites used to practice Mayan ceremonies and rituals, which are considered sacred.</li> <li>• The most sacred place of the village is called "Wachjamalem" or "Amalem Peak," which is an hour away. In this place, the Ajpop, or Mayan Priest, Pablo Morañ, practices different rituals and ceremonies usually related to agriculture.</li> <li>• Most of the people in Quejá are Poqomchi.</li> <li>• They all preserve their identity mainly expressed through their language and regional traditions.</li> <li>• Women still wear their native clothes. The people have little self-esteem but young people are starting to show an interest to communicate with other groups.</li> <li>• Young people increasingly show an acute interest in getting involved in new economic activities, but they lack in the leadership to convince and persuade the rest. This is the prominent conflict of the community.</li> <li>• The community has a wooden chapel and a block church. It is where all religious activities are held, and also serves as the meeting place for the community.</li> </ul>
<p>Community Organization and Attitudes</p>	<ul style="list-style-type: none"> <li>• With regarding to land problems, all community members are supportive. Their main request is for the individual legal documentation of their lands.</li> <li>• For the aspects related to social, cultural and economic development, there is a conflict of interest between two generations. This is the particular case of a small group of youths who belong to the Agriculture Association that works closely with the Programa Las Verapaces.</li> <li>• Some 15 women have been involved in some community activities as a result of the instructions received by their husbands during educational programs provided by the Programa Las Verapaces.</li> </ul>

Source: Social Environmental Survey, JICA Study Team

## (4) Aquil, Alta Verapaz

	Descriptions and Characteristics
Economy	<ul style="list-style-type: none"> <li>• The economy of Aquil is based mainly on agriculture, of which coffee, corn, pepper and pacaya are main crops.</li> <li>• Coffee is the principal produce of the finca area. The associates of the Aquil Cooperative are a group of producers that have a great importance in the area.</li> <li>• The cultivation of coffee was introduced approximately 80 years ago in this community. The Germans established the first plantation in the finca area they had acquired.</li> <li>• A large percentage of the coffee production (more than 95%) is sold through the Aquil Cooperative.</li> <li>• The cooperative sells the coffee with the help of FEDECOCAGUA.</li> <li>• A very small percentage is sold at the local market, through local intermediaries. Price fluctuation is the main problem the associates of the Cooperative and the community face.</li> </ul>
Economic and Social Activities	<ul style="list-style-type: none"> <li>• In Aquil, the system of migratory agriculture is practiced in the finca area. The area has been designated by the community for this end, and is located in the northern part of the finca.</li> <li>• The traditional practice of combining beans, corn and squash cultivations is still practiced. The rotation of areas depends on the fertility and the production of the land.</li> <li>• If the nutrients have been drained off, new areas that have been resting are cleaned and used to grow crops.</li> <li>• Techniques for preparation of the soil consist of cutting and burning, an activity that is done manually during the months of December and January. This activity needs 12 workers per plot.</li> </ul>
Infrastructure and Services	<ul style="list-style-type: none"> <li>• 74% of the population receive the service of water supply. The rest does not have the service because of the location of their houses.</li> <li>• These families have springs because of the location within the the finca area as well as its location within the Sierra Chamá.</li> <li>• There is no drainage system built in the community. The associates of the cooperative do not take advantage of the coffee pulp, sent through the drainage system of the plant, and is later taken to the River Chixoy.</li> <li>• This residue can be used to elaborate organic fertilizers to be used for the coffee plants in the finca.</li> <li>• The community has electricity service since 1996 with public lighting as well as in homes. At present, no information is available as to the number of houses that have this utility.</li> <li>• The road that leads to the community called 7-E is of dirt, and connects Alta Verapaz with Quiché and Huehuetenango. It can be used all year around. The 2 km that separate from 7-E and that leads to the building that houses the Cooperative Aquil, has a paved street system for wheeled vehicles.</li> </ul>



<p>Culture and Religion</p>	<ul style="list-style-type: none"> <li>• Ethnically, the Poqomchí preserve their own language equally in men as in women, children and adults. The men do not use the typical outfits; but it is common for women.</li> <li>• The fact that they are owners of the coffee <i>finca</i> has made a significant difference in their relative economic improvement with respect to the majority of the communities in the rural area.</li> <li>• Their ethnic identity is generally solid in spite of the fact that part of it has been altered with the penetration of the evangelical sects.</li> <li>• In Aquil, most of the population is Catholic. There is an attitude of respect and religious liberty among the churchgoers.</li> <li>• Evangelical churches like El Nazareno and Iglesia de Dios del Evangelio Completo have not managed to overcome the strength of the Catholic Church.</li> <li>• Although the Catholic and Evangelical churches are strong, the people still conserve their traditional Maya Poqomchí religion.</li> <li>• In this community, the population remembers their participation in more than one Mayan religious activities.</li> <li>• There is a Maya Poqomchí priest in the <i>finca</i>, who is consulted in case of problems of various kinds.</li> </ul>
<p>Community Organization and Attitudes</p>	<ul style="list-style-type: none"> <li>• The social organization is centered around the Cooperativa Aquil.</li> <li>• Its system of organization can be classified as modern because it abandons the traditional system.</li> <li>• The offices of mayor and board of directors of the cooperative are occupied by men.</li> <li>• Women have limited participation in community activities.</li> <li>• The Cooperativa de Pequeños Productores de Café Aquil was organized in 1972-1973 as an initiative of the new owners of the <i>finca</i>.</li> <li>• From that moment to the present, the cooperative has played an important role in the social and economic development of its associates and the community.</li> </ul>

Source: Social Environmental Survey, JICA Study Team

(5) **Village Chuimucubal, Quetzaltenango**

	Descriptions and Characteristics
<p>Economy</p>	<ul style="list-style-type: none"> <li>• The economy of the village is based on agricultural production.</li> <li>• The agricultural activity generates surplus, which are sold to different places of the country, and in some cases becomes export products.</li> <li>• With respect to the handicraft activities, women mainly produce garments.</li> <li>• The production is considered for family use, and in rare cases it is sold to neighboring families.</li> </ul>

Economic and Social Activities	<ul style="list-style-type: none"> <li>• The economy of the village is based mainly on the cultivation and selling of vegetable.</li> <li>• <i>Agricultural production is made mainly during the months of rain (May to October).</i></li> <li>• There is a community group that manages irrigation systems, and has agricultural production throughout the year.</li> <li>• There are four priority products, namely, carrot, onion, beet, and radish.</li> <li>• The remaining products are sown in a sporadic way. Sowing takes place when there is demand, in particular, for the export, and when some of the main cultivation face uncertainties with the prices in national or international market.</li> </ul>
Infrastructure and Services	<ul style="list-style-type: none"> <li>• Most of the families of the community are receiving tube water of good water quality, which come from the close mountain areas.</li> <li>• In the village of Chuimucubal, the sanitary service is in high percentage of acceptance for avoiding the contamination.</li> <li>• The village of Chuimucubal is installed with an electric system that is under very good conditions.</li> <li>• There is an asphalt road from the entrance of the village to the nearest main road.</li> <li>• With regard to health services, although the village of Chuimucubal is not far from the municipal capital, there are no useful and emergent transportation modes.</li> </ul>
Culture and Religion	<ul style="list-style-type: none"> <li>• The people living in the community mostly belong to the Quiche <i>Maya or Ladino.</i></li> <li>• Thanks to the permanent employment in the agriculture, temporary migrations are avoided.</li> <li>• The peoples in San Martin Sacatepequez Municipality show high indicators of illiteracy. <i>While the peoples has attended the primary education especially the males, the illiteracy of the females shows a high percentage.</i></li> <li>• The Quiche culture is ingrained among the local peoples.</li> <li>• In terms of customs in the religious matters, they are manifested especially in times, spatial, defined dates, and activities that they manifest the community identity.</li> <li>• The Quiche language has a special significance of the area.</li> </ul>
Community Organization and Attitudes	<ul style="list-style-type: none"> <li>• The level or type of the community organization in Chuimucubal is spontaneous. The groupings are specific in order to solve present problems inside the community, and to improve the conditions of the agricultural production.</li> <li>• This is an example, a committee and organized groups to assist spiritual and religious necessities.</li> <li>• There are churches in the community, namely, Catholic and Evangelical churches.</li> </ul>

Source: Social Environmental Survey, JICA Study Team

(6) **Toj Mech, Quetzaltenango**

	Descriptions and Characteristics
Economy	<ul style="list-style-type: none"> <li>• The household economy of the community is primarily based on agriculture (production of vegetables such as corn and potatoes).</li> <li>• <i>Agricultural activities are not profitable, because the potato production, which is the principal produce at present, is encountering a price and marketing crisis in various localities, Quetzaltenango and, in some cases, foreign countries.</i></li> <li>• The people, mostly women, take part in the production of garments, which is generally for own consumption and only a minimum part is for selling in the cooperative centers in the municipality.</li> </ul>
Economic and Social Activities	<ul style="list-style-type: none"> <li>• The people of San Martin Sacatepequez municipality spare most of their time for agriculture, which includes different activities depending on the season and crop with or without basic irrigation systems.</li> <li>• On Wednesday and Saturday, they are usually engage in commercial activities.</li> <li>• On weekend, they engage in family and community activities.</li> </ul>
Infrastructure and Services	<ul style="list-style-type: none"> <li>• There are Primary and Pre Primary schools, an Institute of Basic Education, and two private schools.</li> <li>• The Health Center is without advanced health facility and with poor service.</li> <li>• <i>Water supply systems cover the municipal center. The drainage systems exist but show deficiencies, and several communities have no drainage systems at all.</i></li> <li>• Power supply system covers 90% of the municipality.</li> </ul>
Culture and Religion	<ul style="list-style-type: none"> <li>• The majority of the people in the San Martin Sacatepequez Municipality belongs to the Mam Maya, and small percentages of people belongs to K'iche and Ladino.</li> <li>• Thanks to the permanent employment in agricultural production, temporary migration is avoided.</li> <li>• The people in San Martin Sacatepequez communities show high indicators in illiteracy, while the peoples has attended the primary education especially the males. The illiteracy of the females occupies a high percentage.</li> <li>• The Mam culture is deep-rooted among the people, in particular, in the religious aspect like the case of Chicabal Lake.</li> <li>• Language, attire (in particular, for women), and religious manifestation are identified to be cultural characteristics.</li> </ul>
Community Organization and Attitudes	<ul style="list-style-type: none"> <li>• San Martin Sacatepequez municipality has a wide range of social organizations, notably, Municipality, Churches of different sects, Health Center, community associations, and Pro-Improvement Committee.</li> <li>• Toj Mech has created a community organization for the conservation of the Chicabal Lake Basin.</li> <li>• Most of the people in San Martin Sacatepequez have shown kindness and a respectful attitude toward tourists visiting the communities.</li> <li>• The tourism sector already exists. There are people who engage in basic guide service and selling of tourism products.</li> <li>• Public investments are directed mainly to infrastructure.</li> </ul>

Source: Social Environmental Survey, JICA Study Team

## 1.5. Development of a Tourism Resources Inventory and GIS Database

### 1.5.1. Objectives

JICA Study Team developed a GIS (geographic information system) database, which enable us to search, display, analyze, and print necessary information concerning tourism resources. The objective of developing the GIS database was to facilitate tourism planning for both JICA Study Team and INGUAT.

### 1.5.2. Contents of the Survey

The survey consisted of the following items:

#### (1) System design and organization of data/information

The sub-contractor designed the system of the database considering the purposes to use it. The JICA Study Team provided a list of tourism resources and its attribute data and information.

#### (2) Data input

##### a. Scales of maps

Two different scales of maps were used to digitize necessary geographical data.

- Country Level: scale 1/500,000
- Town /village levels (around 50 areas): scale 1/50,000

##### b. Geographical data

The sub-contractor digitized the maps of the whole country and tourism-oriented towns and villages. Input data included the following items:

- Coastal line,
- Contour lines,
- Rivers,
- Roads,
- Railways,
- Administrative boundaries (country and departments),
- Locations and names of main towns, and
- Locations of airports.

##### c. Tourism resources data

The GIS database included 342 tourism resources with the following information:

- Location,
- Types of the tourism resources according to the classification established by JICA Study Team,
- Tourism resource evaluation established by JICA Study Team, and
- Site photos.

**(3) System check and improvement**

After completing data input, the sub-contractor checked and improved the system by incorporating comments from JICA Study Team and INGUAT Counterpart Team.

**(4) Preparation of data for web site**

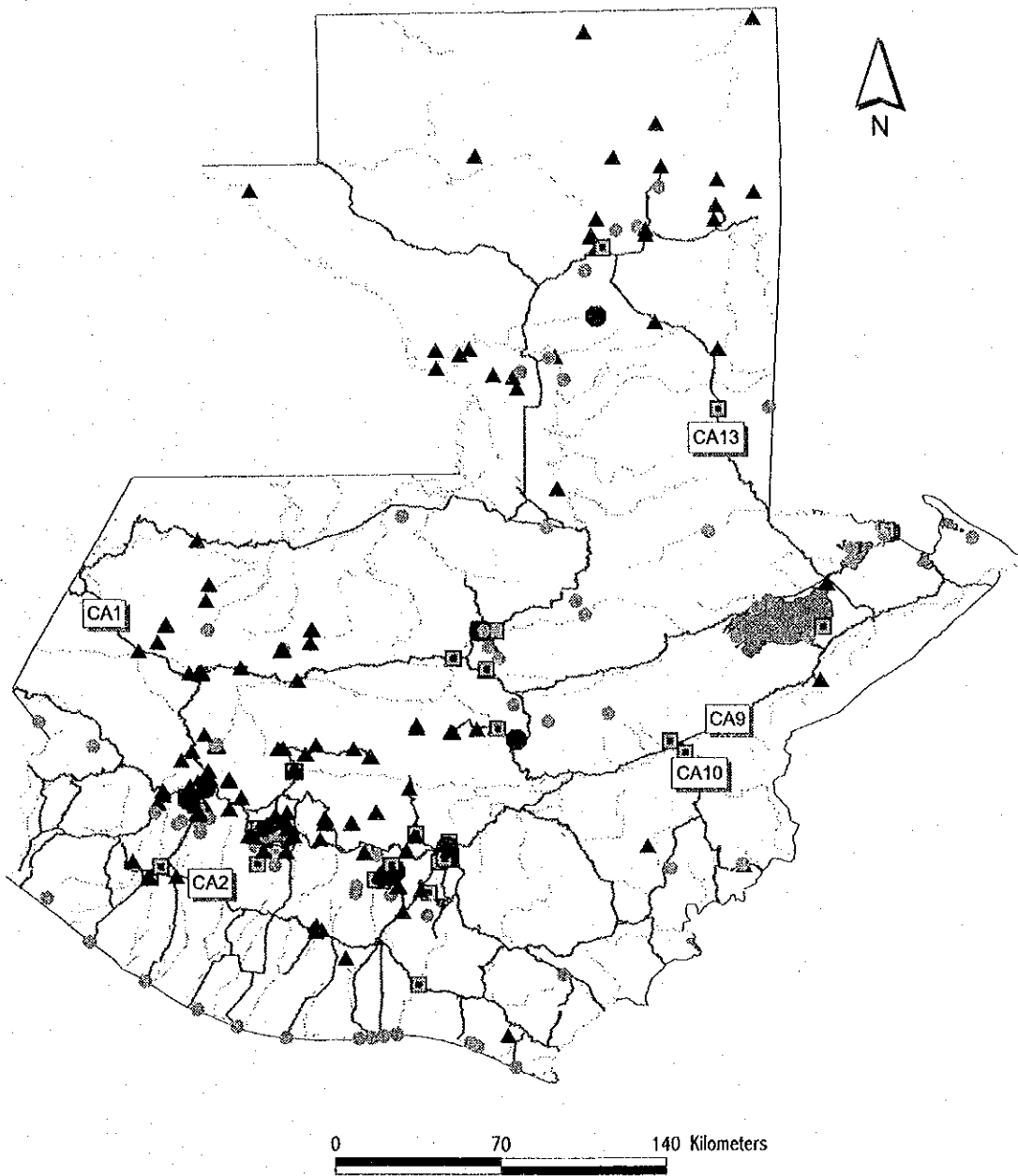
Geographic data in the HTML format were generated by the GIS database for use on the INGUAT web site and for viewing in computers not installed with GIS software.

**1.5.3. Main Outputs and Use of the Survey Results for the JICA Study**

The main output was Arc View format files, which can display tourism resource maps. The database was used for the study of tourism resources, and for the planning of spatial tourism structure of Guatemala. The software, equipments, and database were transferred to INGUAT for future use and further elaboration. An operation manual was prepared and a two-day training for INGUAT staffs had been conducted so that INGUAT could use, update, and elaborate the database according to their needs.

The followings are the examples of GIS maps generated by the database.

Figure 1.1 GIS map example - 1

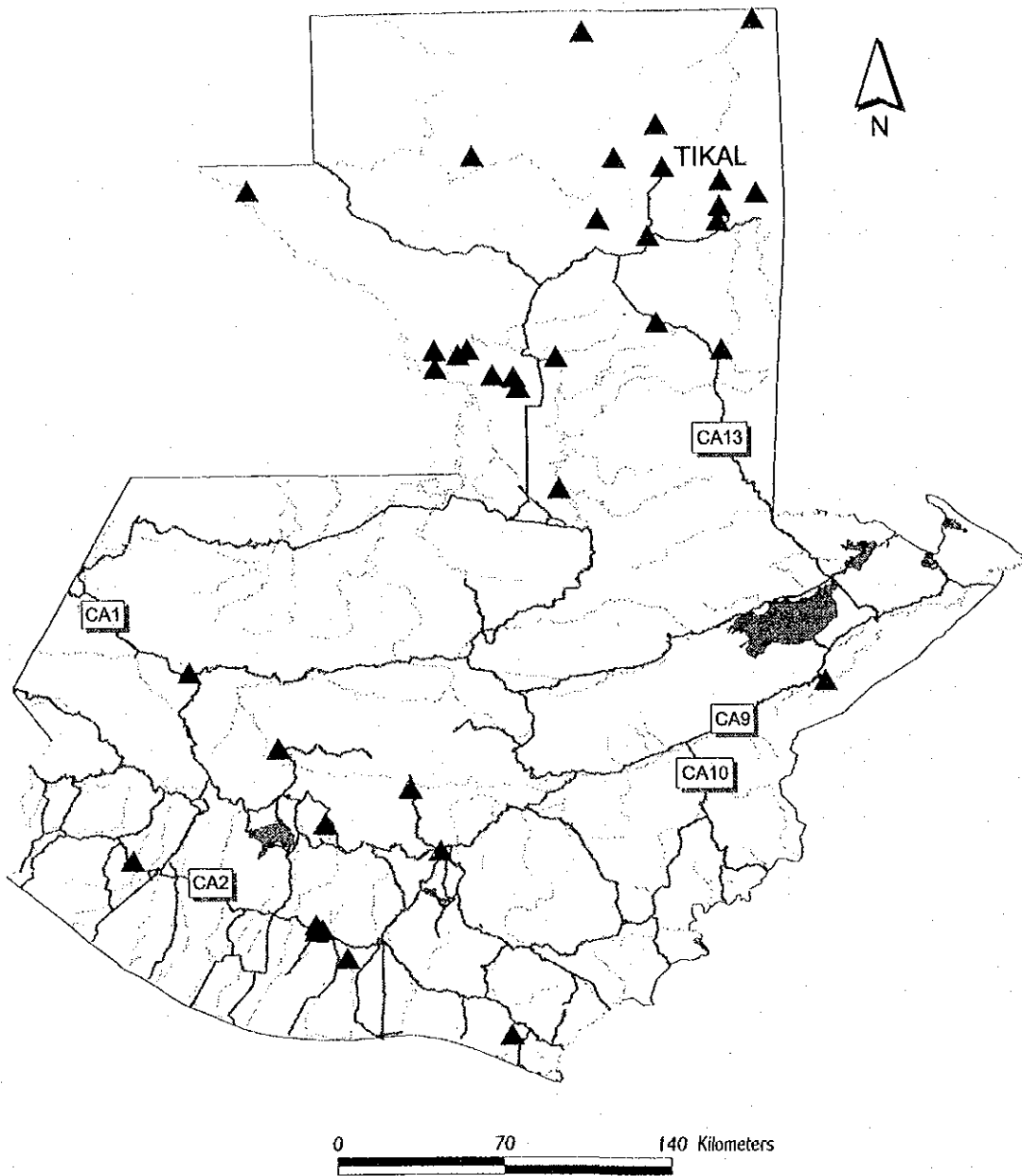


LEGEND

- Natural
- ▲ Cultural
- ☐ Man made attractions
- Others
- ⚡ Roads
- ⋯ Rivers
- Lakes

Source: JICA Study Team

Figure 1.2 GIS map example - 2

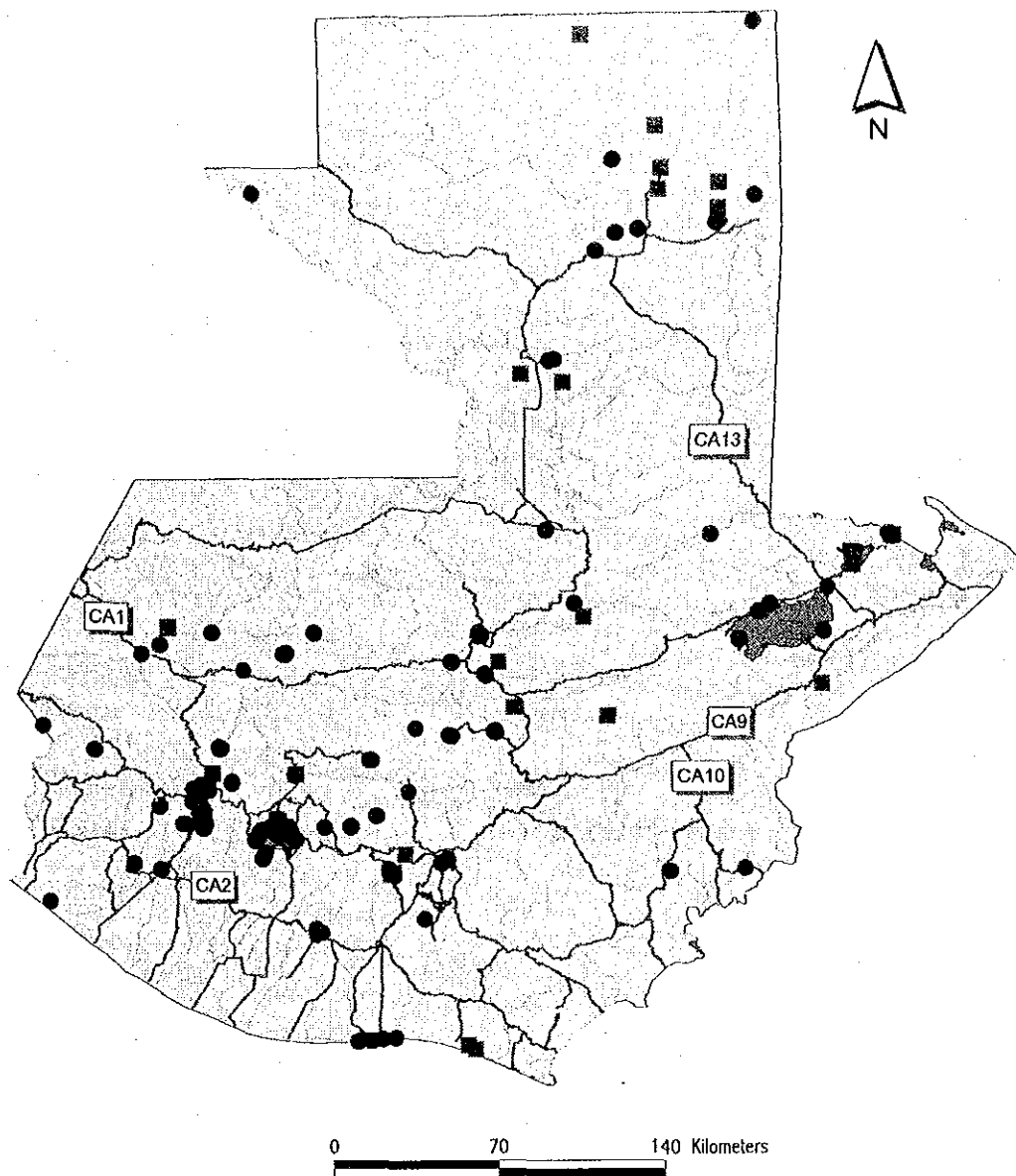


**LEGEND**

- ▲ Archaeological sites
- Roads
- - - Rivers
- Lakes

Source: JICA Study Team

Figure 1.3 GIS map example - 3



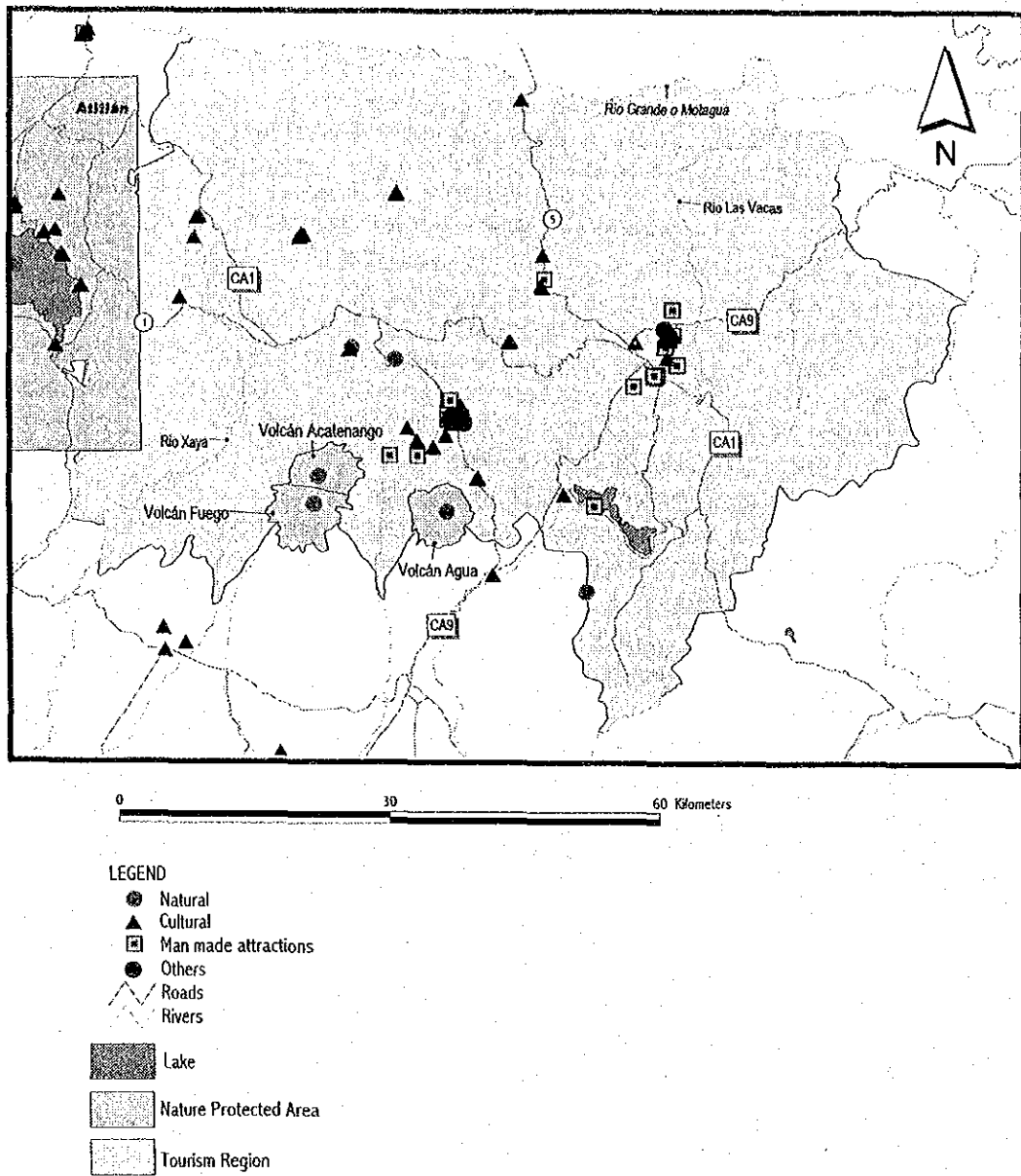
LEGEND

- Tourism resource popular with tourists from neighboring countries
- Tourism resource popular with tourists from outside the region
- Roads
- Rivers
- Lakes

Source: JICA Study Team

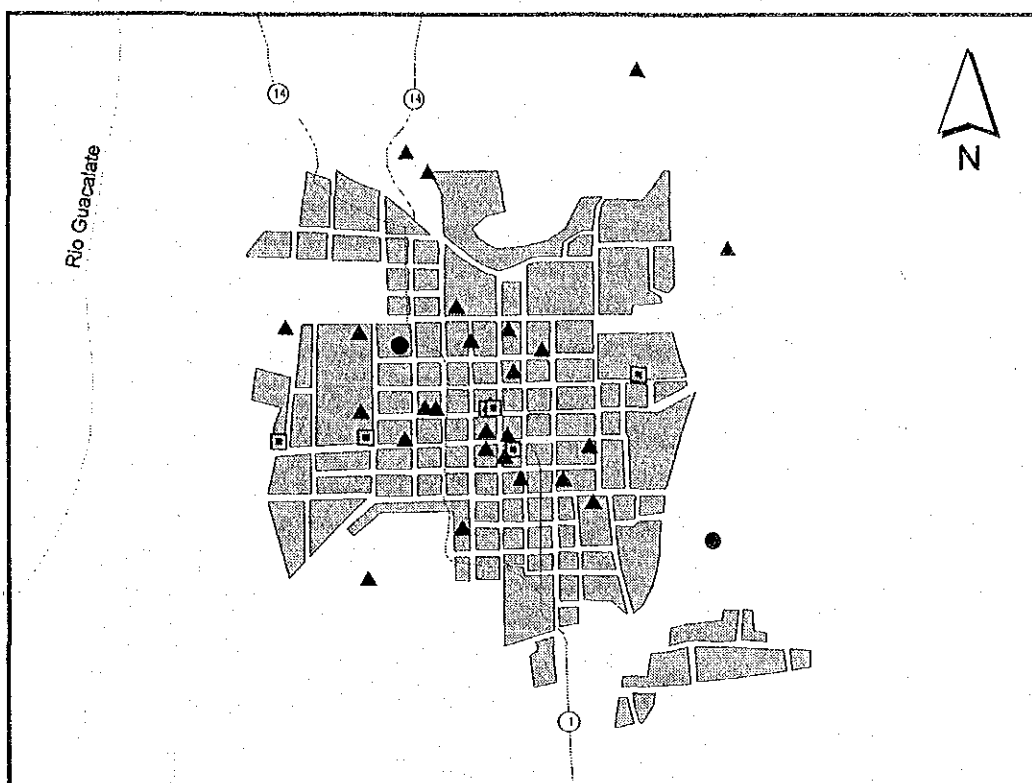


Figure 1.4 GIS map example -4



Source: JICA Study Team

Figure 1.5 GIS map example - 5



LEGEND

- Natural
- ▲ Cultural
- ◻ Man made attractions
- Others
- Roads
- - - Rivers

Source: JICA Study Team

## 2. TOURISM RESOURCES EVALUATION

### 2.1. Tourism Resources Inventory and Evaluation

The JICA Study Team assumes that the attractiveness of a tourism product is a sum of the following three elements:

- Inherent attractiveness,
- Access, and
- Service/facilities.

The second and third elements can be improved by tourism projects, while the first element is unchangeable. In this report, the tourism resources are evaluated in terms of inherent attractions by ranking shown in Table 2.1. The synthetic evaluation using the three elements will be employed for project evaluation.

**Table 2.1 Ranking Criteria of Tourism Inherent Attractions**

Rank	Definition
Rank A	Possible to attract long haul international tourists
Rank B	Possible to attract short haul International tourists
Rank C	Possible to attract domestic tourists from the whole country
Rank D	Possible to attract local visitors/tourists

Source: JICA Study Team

337 tourism resources are identified in whole Guatemala based on INGUAT's tourism inventories and several travel guidebooks. These tourism resources were listed and classified according to the categories as mentioned later, and evaluated mainly by evaluation sheets that were distributed to respective Study Team members during site surveys, which was supplemented by descriptions in travel guidebooks.

### 2.2. Overview of Tourism Resources by Category

JICA Study Team classified the tourism resources into four categories, namely, cultural tourism resources, natural tourism resources, man-made attractions, and others. They were further divided into 18 sub-categories as shown in Table 2.2.

**Table 2.2 Classification of Tourism Resources in Guatemala**

Category	Sub-Category	Details
Cultural Tourism Resources	1) Archaeological Sites	Ruin
	2) Colonial Cities, Architecture, and Colonial Cultures	Cathedral, church, colonial townscape
	3) Living Indigenous Cultures	Market, handicraft, village-scape, festival
	4) Others	Garifuna Culture, Newly developed handicrafts
Natural Tourism Resources	5) Lakes/ Rivers/ Waterfalls	-
	6) Nature Protected Areas	Biological reserve, wildlife refuge, National Park
	7) Topographical Features	Volcano, mountain, gorge
	8) Caves	-
	9) Beaches	-
	10) Spa	-
Man-made Attractions	11) Museums	-
	12) Leisure Facilities	Water park, swimming Pool
	13) Parks/ Gardens	Zoo, botanical garden, park,
	14) Farms	Coffee farms
	15) Resorts/ Hotels	-
Others	16) Shopping*	-
	17) Foods	Local cuisine, alcoholic beverage
	18) Language Schools	-

Note: \*Shops/markets of indigenous handicrafts are categorized into "Living Indigenous Cultures".

Source: JICA Study Team

### 2.2.1. Cultural Tourism Resources

Cultural tourism resources were classified into four categories, namely, 1) archaeological sites, 2) colonial cities, architecture, and colonial cultures, 3) living indigenous cultures, and 4) others. The first three sub-categories are considered to be essential for tourism in Guatemala. All of them include the most unique and valuable tourism resources in Guatemala, which can attract long haul international tourists.

#### (1) Archaeological sites

Most of the Rank A and Rank B archaeological sites, including the World Heritage site of Tikal, are located in Petén, although there are archeological sites all over Guatemala. Their attractiveness in Petén is strengthened by the richness of surrounding nature areas such as Maya Biological Reserve, Tikal National Park, and Lake Petexbatún. On the other hand, many of valuable archaeological sites in Petén are remote, and are accessible only by horse, boat, or on foot. Tikal and Yaxhá are the easiest accessible archaeological sites among the Rank-A tourism resources of this category in Peten. Uaxactún is also A-Ranked, but the accessibility is worse than the two. There is a cluster of archaeological sites around Sayaxché such as Ceibal, Aguateca, and Dos Pilas. Ceibal and Aguateca can be reached by boat via Pasión River and Lake Petexbatún. This area has potential to attract more long-haul international tourists, although they are evaluated as Rank B, because of a possible combination with the richness of surrounding nature areas. Rest of the sites including El Mirador, where the inherent attractiveness are evaluated to be Rank A or Rank B, may be developed on a long-term basis, because they are isolated each

other, difficult of access, and have not been excavated/restored enough to attract international tourists.

Quiriguá in the Izabal Department is another archaeological site nominated as World Heritage.

**(2) Colonial cities and architecture, and colonial cultures**

The townscape and architecture of Antigua, which is a World Heritage site, is the highlight of the sub-category of colonial cities and architecture. The city of Quetzaltenango can follow Antigua in terms of future potential. Most of indigenous villages have colonial-style churches, which can be an additional attraction to the living indigenous cultures.

**(3) Living indigenous cultures**

This sub-category includes markets, handicrafts, village-scape, and festivals of indigenous villages. Almost all the high ranked tourism resources with Rank A or B classified into this sub-category are located in the western highlands. The indigenous cultures are one of the most well-known tourism attractions in Guatemalan tourism, in particular, uniqueness, elaboration, and variety of their weavings. However, most of those tourism resources are simple and not adequately developed as tourism products for international tourists. Mostly, markets are only the access to appreciate these cultural tourism resources.

**(4) Others**

The Garífuna culture in the Caribbean town of Livingston belongs to this sub-category. Although Garífuna culture is not as well known as the indigenous cultures in the highlands, for uniqueness and attractiveness this culture is comparable to them. There are newly developed handicrafts such as woodcarvings in El Remate and the glass factory near Cantel also fall into this sub-category.

### **2.2.2. Natural Tourism Resources**

Nature tourism resources are classified into five sub-categories, namely, 5) lakes/waterfalls, 6) nature protected areas, 7) topographical features, 8) caves, 9) beaches, and 10) spa. Natural tourism resources are less known compared with the cultural ones, but are emerging tourism for in Guatemala. Besides, some nature tourism resources are indispensable to enhance the attractiveness of cultural tourism resources. Semuc Champey and quetzals' habitats in Alta Verapaz and Baja Verapaz, nature protected areas around Lake Izabal and El Golfete, mangrove swamps and nesting sites for sea turtles on the Pacific Coast, and forests and lakes in Petén are the major resources evaluated as Rank A.

### **2.2.3. Man-made Attraction**

Man-made attraction includes, 11) museums, 12) leisure facilities, 13) parks/ gardens, 14) farms, and 15) resorts/ hotels. Man-made attractions are currently very limited in

Guatemala. Hotel Casa de Santo Domingo is a hotel that can be considered as a tourism resource. Lakeside resorts around Lake Izabal may have potential to attract long-haul international tourists. Most of the tourism resources in this category are attracting tourists from neighboring countries and domestic tourists. Major tourism resources are Xocomil Water Park (IRTRA), Valle Dorado Aquatic Park (Río Hondo), and Amatique Bay beach resorts near Puerto San José.

#### 2.2.4. Others

This category includes, 16) shopping, 17) foods, and 18) language schools. Shopping, except indigenous handicrafts, which are categorized into Living Indigenous Culture, and foods are not attractive factors for Guatemalan tourism. Language schools, mainly located in Antigua and Quetzaltenango, are qualitatively and economically valuable for international tourists.

Table 2.3 shows the number of tourism resources by category and rank. Table 2.4 shows the main tourism resources evaluated as Rank A, and Figure 2.1 shows the distribution of major tourism resources.

**Table 2.3 The Number of Tourism Resources by Category and Rank**

Category/Sub-Category	Rank A	Rank B	Rank C	Rank D	Total
<b>Cultural Tourism Resources</b>	18	87	60	43	208
1) Archaeological Site	6	14	6	12	38
2) Colonial Cities, Architecture, Colonial Culture	2	7	10	13	32
3) Living Indigenous Culture	8	61	44	18	131
4) Others	2	5	-	-	7
<b>Natural Tourism Resources</b>	11	19	31	15	76
5) Lakes/Rivers/Waterfalls	4	3	4	4	15
6) Nature Protected Areas	7	4	1	1	13
7) Topographical Features	-	7	11	1	19
8) Caves	-	3	3	2	8
9) Beaches	-	-	11	2	13
10) Hot Springs	-	2	1	5	8
<b>Man-made Attractions</b>	-	11	21	17	49
11) Museums/Theaters	-	5	16	3	24
12) Leisure Facilities	-	1	1	2	4
13) Parks/Gardens	-	1	2	7	10
14) Farms	-	1	-	3	4
15) Resorts/Hotels	-	3	2	2	7
<b>Others</b>	-	2	7	-	9
16) Shopping	-	-	1	-	1
17) Foods	-	-	6	-	6
18) Language Schools	-	2	-	-	2
<b>Total</b>	29	118	120	75	342

Source: JICA Study Team

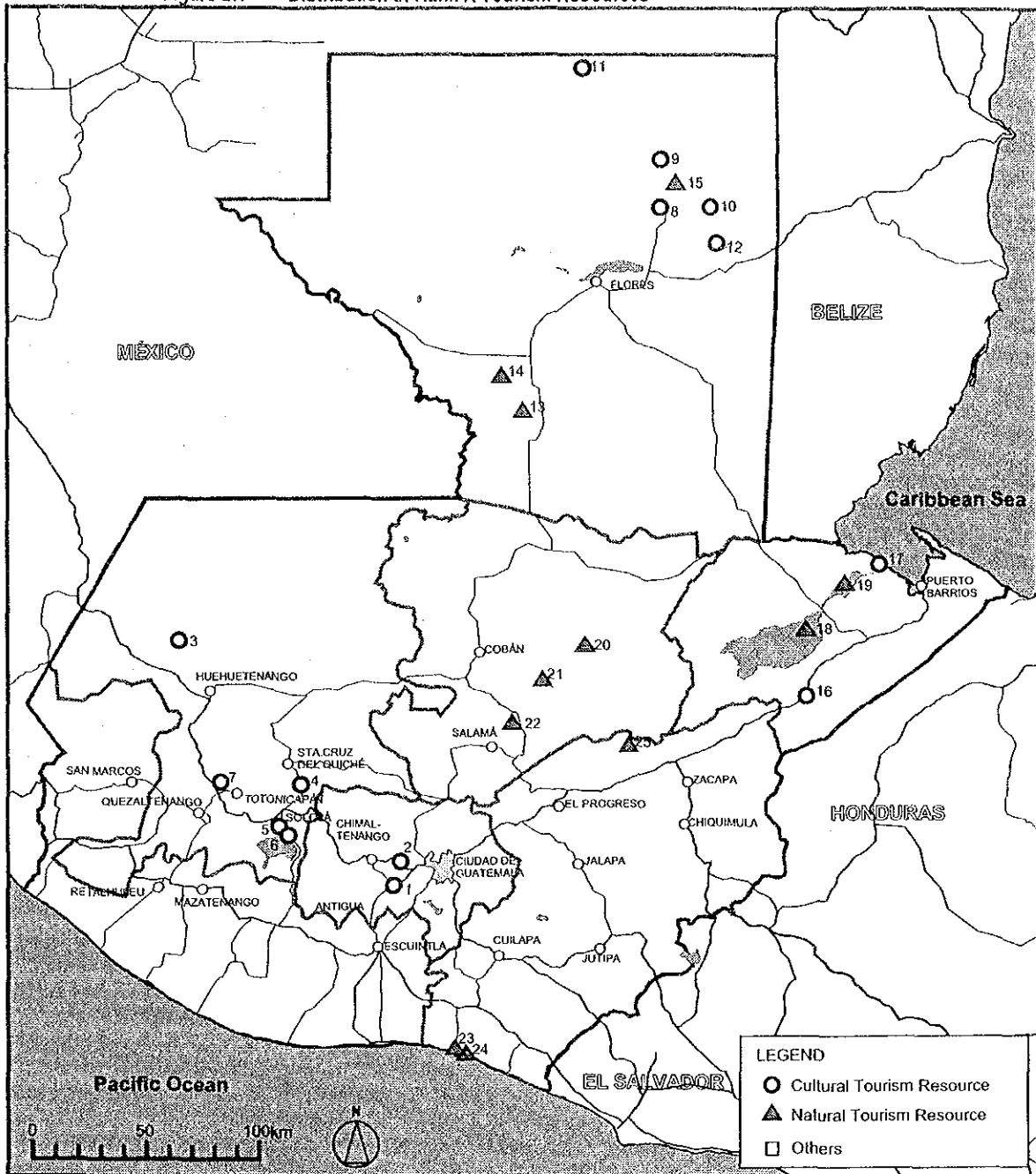
**Table 2.4 Major Tourism Resources in Guatemala**

No.*	Name	Department	City/Village	Category			
				Cultural	Natural	Man-made	Others
1	Colonial Townscape and Architecture	Sacatepequez	Antigua	X			
	Semana Santa Celebration	Sacatepequez	Antigua	X			
2	Día de los Muertos	Sacatepequez	Santiago Sacatepéquez	X			
3	Market	Huehuetenango	Todos Santos Cuchumatán	X			
	Weaving	Huehuetenango	Todos Santos Cuchumatán	X			
	El Día de de Todos los Santos	Huehuetenango	Todos Santos Cuchumatán	X			
4	Market	Quiché	Chichicastenango	X			
5	Market	Sololá	Sololá	X			
6	Market&Handicraft Shops	Sololá	Panajachel	X			
7	Market	Totonicapán	San Francisco El Alto	X			
8	Tikal (Incl. Museums)	Petén	-	X			
9	Uaxactún	Petén	-	X			
10	Nakúm						
11	El Mirador	Petén	-	X			
12	Yaxhá	Petén	-	X			
13	Lake Patexbatún	Petén	-		X		
14	Río de la Paslón	Petén	-		X		
15	Parque Nacional Tikal	Petén	-		X		
16	Quirigua	Izabal	-	X			
17	Townscape	Izabal	Livingston	X			
	Garifuna Culture	Izabal	Livingston	X			
18	Lago de Izabal&El Golfete	Izabal	-		X		
19	Biotopo Chocón Machacas	Izabal	-		X		
20	Semuc Champey	Alta Verapaz	-		X		
21	Sierra de Yalijux	Alta Verapaz	-		X		
22	Biotopo del Quetzal	Baja Verapaz	-		X		
23	Biotopo Monterrico-Hawaii	Santa Rosa	Monterrico		X		
24	Reserva Natural Hawaii	Santa Rosa	Monterrico		X		
25	Sierra de las Minas	-	-		X		

Note: \* Corresponding the numbers on the map in Figure 2.1.

Source: JICA Study Team

Figure 2.1 Distribution of Rank A Tourism Resources



Source: JICA Study Team



### 2.3. Overview of Tourism Resources by Tourism Region

Table 2.5 shows an overview of Rank A-tourism resources by INGUAT's Tourism "Theme" Region. The top four Tourism Regions: "Modern and Colonial Guatemala," "Living Indigenous Highlands," "Mayan Adventure" and "A Different Caribbean," are the most competitive Tourism Regions in terms of tourism resources. All of them have unique characteristics with different types of tourism resources.

"Modern and Colonial Guatemala" Tourism Region has Antigua, which is a typical colonial city and well-known as a World Heritage site. "Living Indigenous Highlands" Tourism Region, where most of the unique indigenous villages are located, has abundant tourism resources of living indigenous cultures. "Mayan Adventure" Tourism Region has valuable archaeological sites including the World Heritage site of Tikal, in combination with its natural environment. In "A Different Caribbean" Tourism Region, Garífuna culture and nature/wildlife around Lake Izabal and El Golfete are the principal attractions, which can be developed further as a major international tourism destination.

"Nature Paradise" Tourism Region is an emerging eco-tourism destination with nature-based tourism resources such as Quetzal Biotope, Semuc Champey, and a few caves. It has potential for an "alternative tourism" destination. "Guatemala for Discovery" Tourism Region and "Pacific Coast" Tourism Region do not have enough tourism resources to be major tourism destinations.

**Table 2.5 Overview of Tourism Regions**

Tourism Region	Cultural				Natural tourism resources	Man-made attractions
	Archaeological site	Colonial cities & architecture	living indigenous Culture	Others		
1 Modern & Colonial Guatemala	X	XXX				X
2 Living Indigenous Highlands			XXX		X	
3 Mayan Adventure	XXX				XX	
4 A Different Caribbean				XXX	XXX	XX
5 Nature Paradise			XX		XX	
6 Guatemala for Discovery					X	X
7 Pacific Coast						

Note: XXX-Major tourism attraction, XX-Alternative tourism attraction, X-Minor tourism attraction

Source: JICA Study Team

## 3. TOURISM MARKET

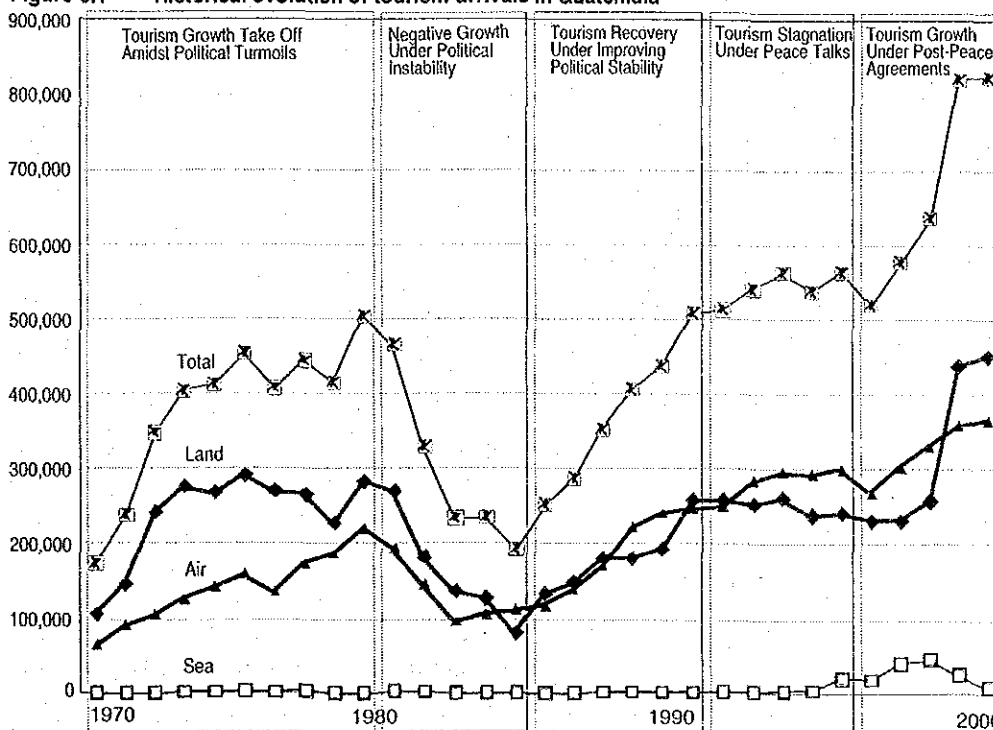
### 3.1. Overview of the Tourism Market

#### 3.1.1. Historical Trend of Visitors Arrivals

International visitor arrivals to Guatemala recorded 826,240 in the year 2000. Table 3.1 on the next page shows the number of international visitors arrivals to Guatemala since 1963, as well as tourism revenues and per-tourist expenditures from 1990 to 2000.

Historical evolution of tourism in Guatemala would be divided into the 5 periods as shown in Figure 3.1. 1970s was a period of tourism takeoff in spite of political turmoil, while the first half of 1980s was a period of serious political instability. Figures show a negative growth recording the lowest visitor arrivals in 1985. During the latter half of the 1980s, Guatemala saw an improvement in political stability resulting from democratic elections, which led to a recovery of visitor arrivals although there were still guerrilla activities. The first half of the 1990s saw a brief stagnation under the Peace Talks process, and tourism growth accelerated after the signing of the Peace Agreements in 1996.

Figure 3.1 Historical evolution of tourism arrivals in Guatemala



Source: JICA Study Team

Tourism revenues totaled US\$ 707.5 millions in 2000, which is almost four times as much as the amount in 1990, and per-capita tourism expenditure almost doubled in the same period and was recorded at \$ 856 in 2000. Growth rate of tourism revenue during the Post-Peace Agreements period (1996 – 2000) was as high as 25.6%, while that of per-capita expenditure was 11.9% during the same period.

**Table 3.1 International visitor arrivals to Guatemala and tourism income**

Year	Total	Growth rate	Tourism Income Per-capita Tourism	
			(Millions USD)	Expenditure (USD)
1963	122,166	-	n-a	-
1970	173,652	-	n-a	-
1980	466,041	-	n-a	-
1981	328,877	-29.4%	n-a	-
1982	233,880	-28.9%	n-a	-
1983	235,166	0.5%	n-a	-
1984	191,934	-18.4%	n-a	-
1985	251,947	31.3%	n-a	-
1986	287,460	14.1%	n-a	-
1987	352,741	22.7%	n-a	-
1988	405,230	14.9%	n-a	-
1989	437,019	7.8%	n-a	-
1990	508,514	16.4%	185.5	365
1991	512,620	0.8%	211.3	412
1992	541,025	5.5%	243.2	450
1993	561,917	3.9%	265.4	472
1994	537,374	-4.4%	258	480
1995	563,478	4.9%	276.6	491
1996	520,085	-7.7%	284.3	547
1997	576,362	10.8%	325.2	564
1998	636,276	10.4%	394.1	619
1999	822,696	29.3%	570.1	693
2000	826,240	0.4%	707.5	856
<b>Annualized</b>	<b>Growth</b>	<b>Rate:</b>		
1963-1970		5.2%		
1970-1980		10.4%		
1980-1990		0.9%		
1990-1995		2.1%	-21.6%	8.3%
1996-2000		12.3%	25.6%	11.9%

Source: JICA Study Team with data of INGUAT. Estadísticas de Turismo 1995. Different years.

### 3.1.2. International Visitor Arrivals by Regional Market

Statistical data during the Post-Peace Agreement period (1996 – 2000) is more detailed than those of the former periods, and regional, and even country-by-country market characteristics, can be analyzed from the data. Table 3.2 shows that neighboring countries (El Salvador, Mexico, Honduras and Belize) constitute the most important regional market for Guatemala with a 48.0% share of the total visitor arrivals, or 401,465 visitors in 2000. It is characterized by a high annual growth rate of 18.4% during the Post Peace Agreements period. North America is the second important market with a 24.5% share, or 202,699 visitors with a lower growth rate of 8.4%. It is followed by Europe, which constitutes 14.0% of the total with an annual growth rate of 5.2%. The share of Other Central America countries (Nicaragua, Costa Rica and Panama) is 5.4%, which is the 4th importance market with an annual growth rate of 8.7%. All other regions occupy 13.5% of the market.

**Table 3.2 Visitor Arrivals to Guatemala by Geographic Region (Unit: thousands)**

Region	1996	1997	1998	1999	2000	Annual growth	2000	Average share
						1996-2000	Share	1996-1999
North America *1	146.8	179.1	188.6	201.7	202.7	8.4%	24.5%	28.0%
Neighboring Countries *2	204.2	210.1	238.6	392.1	401.5	18.4%	48.6%	40.9%
Other Central America *3	32.0	37.8	43.1	63.5	44.7	8.7%	5.4%	6.9%
South America	24.1	27.4	30.5	30.8	34.7	9.6%	4.2%	4.4%
Caribbean	2.3	2.7	4.0	4.4	4.5	18.7%	0.5%	0.5%
Europe	94.5	101.8	112.8	111.0	115.9	5.2%	14.0%	16.4%
Near East	2.6	3.0	3.0	2.9	3.7	9.4%	0.4%	0.4%
Middle East	0.3	0.3	0.3	0.3	0.4	9.4%	0.0%	0.0%
Far East	10.6	11.6	12.2	12.9	14.1	7.2%	1.7%	1.9%
Australia	1.4	1.8	2.2	2.0	2.8	19.0%	0.3%	0.3%
Others	1.4	0.7	1.1	0.9	1.4	0.0%	0.2%	0.2%
Total	520.1	576.4	636.3	822.7	826.2	12.3%	100.0%	100.0%

Note: \*1 Includes United States and Canada; \*2 includes: Mexico, El Salvador, Honduras and Belize. \*3 Includes: Nicaragua, Costa Rica and Panama.

Source: JICA Study Team based on INGUAT data.

**Table 3.3 Bed-nights in Guatemala by Geographic Region**

Region	Visitors 2000	Length of stay (nights)	Bed-nights (night)	Share	Guatemala's share in the total nights
North America *1	202,699	19.73	3,999,251	32.3%	69.3%
Neighboring countries *2	401,465	6.94	2,786,167	22.5%	76.9%
Other Americas	83,957	12.18	1,022,596	8.2%	76.0%
Europe	115,853	30.79	3,567,114	28.8%	61.2%
Others	22,266	45.96	1,023,345	8.3%	80.1%
Total	826,240	15.01	12,398,474	100.0%	69.4%

Note: \*1 USA and Canada; \*2 México, El Salvador, Honduras and Belize

Source: Compiled by JICA Study Team based on the visitor survey and INGUAT data

### 3.1.3. International Visitor Arrivals by Means of Transport

Table 3.4 shows visitor arrivals by means of transport. 54.5% of the visitors arrived at Guatemala by surface transport in 2000, while 44.3% used flights and merely 1.2% used sea transport. In a historic perspective, the share of air transport had been on an increasing trend until it reversed in the Post-Peace Agreements period due to a rapid increase of Salvadorian visitors who enter Guatemala by bus or private car.

**Table 3.4 International visitor arrivals to Guatemala by means of transport**

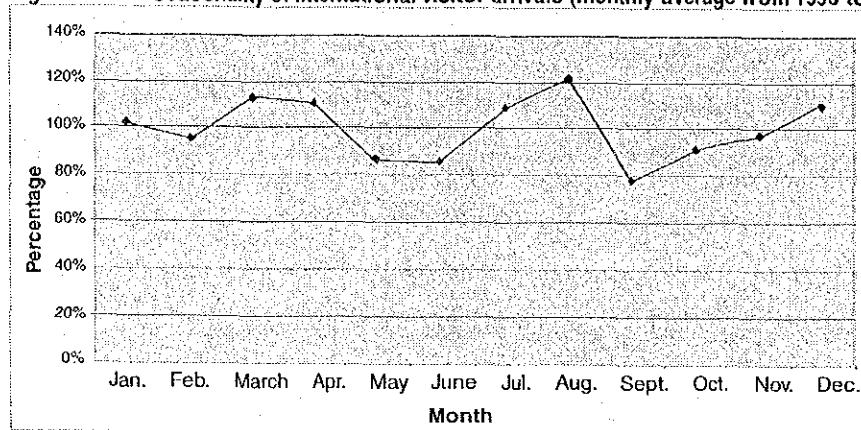
Year	Air	Share	Land	Share	Sea	Share	Total	Share
1963	40,703	33.3%	80,361	65.8%	1,102	0.9%	122,166	100.0%
1970	65,607	37.8%	106,660	61.4%	1,385	0.8%	173,652	100.0%
1975	159,668	35.1%	291,207	64.1%	3,561	0.8%	454,436	100.0%
1980	192,588	41.3%	270,295	58.0%	3,158	0.7%	466,041	100.0%
1985	117,627	46.7%	133,853	53.1%	466	0.2%	251,947	100.0%
1990	247,135	48.6%	258,303	50.8%	3,076	0.6%	508,514	100.0%
1996	269,070	51.7%	231,659	44.5%	19,356	3.7%	520,085	100.0%
2000	365,835	44.3%	450,522	54.5%	9,883	1.2%	826,240	100.0%

Source: JICA Study Team based on data from INGUAT and Dirección General de Migración

### 3.1.4. Seasonality of International Visitor Arrivals

As shown in Figure 3.2, the seasonality of international visitor arrivals is not very significant. 20% above or under the average is the range of fluctuation: March – April (Holy Week), July - August (Summer Holidays), and December (Christmas Holidays) are the most important months.

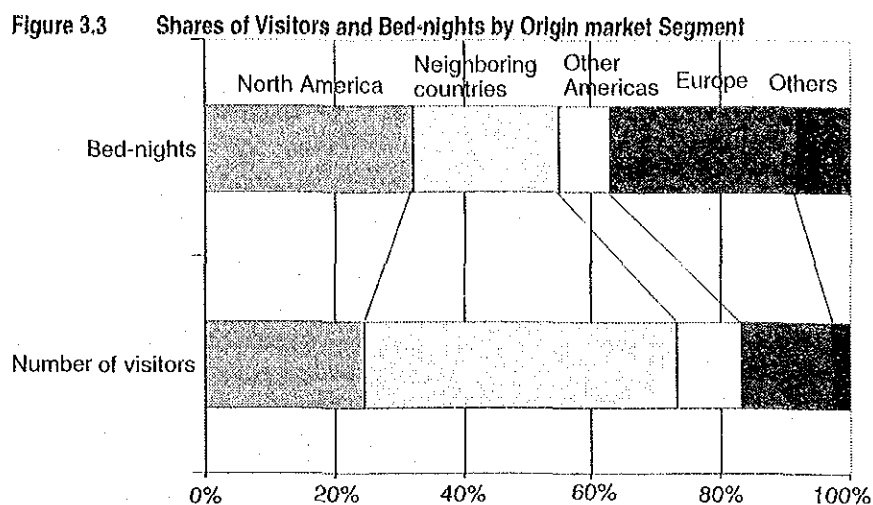
**Figure 3.2 Seasonality of international visitor arrivals (monthly average from 1996 to 2000)**



Source: JICA Study Team.

### 3.2. Market Characteristics by Origin Market

The followings are market characteristics of the five market segments of Neighboring Countries, North America, Europe, Other Americas, and Domestic. The analysis presented here is based on the INGUAT statistics, but is supplemented largely by interviews with, and questionnaire surveys of, the travel trade both in Guatemala and abroad, and the results of the visitor survey conducted by JICA Study Team. It is noted that the visitor survey was conducted not only in international airports but also at major border crossing points, and was the first survey in Guatemala that provides a comprehensive overview of the international tourism market.



Source: JICA Study Team

### 3.2.1. Neighboring Countries (Mexico, El Salvador, Honduras and Belize)

#### (1) Volume

A total of 401,465 visitors arrived in Guatemala in 2000 from the countries bordering on Guatemala. The regional market segment occupies 48.6% of the total visitor arrivals, and is the largest among the origin market segments in terms of the number of visitor arrivals. As shown in Figure 3.3, due to a short length of stay in Guatemala, the share of the market volume (bed-nights) is not as large as the share of visitor arrivals. Annualized growth rate of the market segment was 18.4% over the Post-Peace Agreements period (1996 – 2000), which is also the highest. El Salvador constitutes more than 70% of the market segment, and the recent growth of this market segment is largely caused by the growth of the visitors from the country.

It is noted that the numbers of border arrivals from El Salvador and Mexico reported in the Guatemalan Statistics are much smaller than the numbers reported in the Salvadorian and Mexican statistics. Therefore, the volume of this market segment may be still underestimated.

#### (2) Market characteristics

##### a. Demographics

According to the visitor survey conducted by JICA Study Team, almost three quarters of the respondents (71%) were men, and 69% belonged to the age bracket of 20 – 39 years old. Two thirds were married or living together (65%). Although the educational level of the market segment is the lowest among the 5 regional segments, 43% of the visitors were university graduates.

##### b. Travel behavior

Only 18% of the respondents have visited Guatemala for the first time, which is the lowest figure among the 5 origin market segments. 95% used surface transport due to geographical proximity. Only 23% traveled alone, and 18% of the visitors traveled with spouse and children, which was the highest.

**c. Visitor types**

58% of the respondents were tourists or those who traveled for "holidays." 18% of the respondents visited Guatemala for "visiting friends and relatives," which is the highest among the regional segments.

"Nature and wildlife" was the most popular attraction of Guatemala for those who traveled for "holiday," which accounted for 23%. It was followed by "colonial cities and architecture" and "archeological sites," which accounted for 20% and 16% respectively. "Beach" was also an important attraction for this market segment (13%), which is the highest figure and may indicate Guatemala's potential for recreational tourism.

Major activities while in Guatemala were "visiting colonial cities (39%)," "local food (39%)," "nature areas (37%)," "indigenous markets (28%)," "beach (28%)" and "archeological sites (27%)," "shopping handicrafts (19%)", "museums (14%)" and "spa (14%)."

"Areas to visit again" concentrated in El Petén and Sacatepéquez (Antigua) both accounting for 23%, followed by Guatemala City and Sololá (15% for each).

**d. Use of package tours**

People from the neighboring countries rarely used package tour (95%). It reflects their knowledge and personal ties with Guatemalans, which facilitates independent travel.

**e. Use of accommodation**

Contrary to a popular belief, hotel was the most commonly used type of accommodation, which accounted for 75%. Use of friends and relatives' homes was the highest among the origin market segments, although it occupied only 22%.

**f. Travel itinerary and expenditure**

Visitors from the neighboring countries spent \$ 696 and 9 nights in average for a trip. They spend \$ 545 and 7 nights in Guatemala in average. The amount spent for handicrafts was \$ 79, which was the lowest among all the market segments. Visitors from neighboring countries tourist rarely combined Guatemala with other country.

**g. Competitor destinations**

Two thirds (63%) of the respondents did not compare Guatemala with other destinations. For the rest of the respondents, Mexico, Honduras, Costa Rica, and Belize were major competitor destinations.

**h. Satisfaction level**

Half of the tourist (49%) had no complaints. Some referred to "security" and "environmental destruction" (9% and 8% respectively). "Taxi service and public transport" was the item the market feels "strong needs for improvement."

### 3.2.2. North America (Canada, USA)

#### (1) Volume

The US market generated 202,699 visitors in 2000. Canada has a limited importance with 15,915 visitors in the same year. The number of visitor arrivals from North America was growing at 8.4% over the past decade. Its market share was 24.5% in 2000.

#### (2) Market characteristics

##### a. Demographics

Two thirds of the respondents (64%) were men while the half were more than 40 years old (51%). Half of them are married (49%). The respondents were highly educated; almost 90% has a university or post-graduated degree, which does not only reflect the types of Guatemala's tourism products but also study and research activities of universities and NGOs in the USA.

##### b. Travel behavior

Half (53%) of the respondents visited Guatemala for the first time, and 60% arrived by air. Almost half (46%) of the respondents traveled with friends and/or spouse. The most common purpose of visit was "holiday" (43%), which was followed by "visiting friends and relatives (VFR -16%)," and "business and trade (14%)." These three purposes totaled around three quarters (73%) of the respondents. A relatively higher share of "business and trade" may reflect the activities of US companies in Guatemala as well as historical links with the country; Guatemala City is the largest city in Central America and, therefore, many of the US-based multinational firms operating in the region have its office in Guatemala City.

##### c. Visitor types

Principal attractions to visit Guatemala were "archeological sites (31%)," "living indigenous cultures (30%)," and "colonial cities and architecture" (15%). The percentage of "living indigenous cultures" was the highest of all the geographic segments.

"Indigenous marketplace (59%)," "colonial cities (56%)," and "archaeological sites (54%)" were the most commonly visited places in Guatemala. It is noted that 47% of the respondents visited "nature areas" although only a small number of respondents (7%) quoted it as the principal attraction to visit Guatemala.

Popular "areas to visit again" were El Petén (39%), Sacatepéquez – Antigua (36%), Sololá -Atitlán Lake (20%). Las Verapaces, Quetzaltenango, and Huehuetenango were rarely mentioned as the places for next visit (6%, 4%, and 3%, respectively).

##### d. Use of package tour

Those who used package tour purchased in their origin country accounted for 10%, which is relatively high among the origin market segments. 7% of the respondents purchased package tour in Guatemala or in a neighboring country.



**e. Use of accommodation**

Hotel is the most commonly used accommodation for North America (77%). Coming second is friends and relative's homes (22%), which is relatively high and probably reflects the importance of the ethnic market. Travel trade interviews also point to the importance of this market segment.

**f. Travel Itinerary and expenditure**

Half (47%) of the respondents traveled only within Guatemala. Popular countries combined with Guatemala were Belize (17%), Honduras (14%), Mexico (13%), and USA (13%), which may indicate the popularity of Maya World itineraries, and importance of hub airports such as Miami and Cancun.

Visitors from North America spent \$2,397 for 28 nights in average for a trip. They spent \$1,049 and 20 days in average in Guatemala. Consumption for handicrafts was \$197. Average daily expenditure for the whole trip was \$84 while that in Guatemala was \$53.

**(3) Competitor destinations**

Competitor destinations were Costa Rica, Mexico, Belize, Honduras and Caribbean (18%, 17%, 14%, 7% and 4% respectively).

**(4) Satisfaction level**

21% of the respondents replied that "environmental destruction" was the aspect they don't like in Guatemala. It even surpassed the "security" (18%) issues.

**3.2.3. Europe**

**(1) Volume**

Europe generated a total of 115,853 visitors in 2000; it accounted for some 15% of the total with an annualized growth rate of 5.2% during the 1996 – 2000 period. Main visitor-generating countries within the region are Germany, Spain, France and Italy. The growth rate of Holland was as high as 17.8% over the past decade.

A relatively large number of visitor arrivals from Spain would be explained by the presence of Spanish multinational enterprises in Guatemala like *Unión Fenosa* and *Telefónica*, as well as those in the tourism sector such as *Ibero Jet*, *Meliá* and *Barceló* hotel chains.

**(2) Market characteristics**

**a. Demographics**

Two thirds of the respondents were men between 20 and 39 years old (63%), which implies that the visitors from Europe is younger than those from North America. Europe is the market segment with the second highest share of more than 40 years old (36%). Half of them are married. Some 70% of the respondents have a university or post-graduate degree, which is high but lower than that of North America.

**b. Travel behavior**

Two thirds of the respondents visited Guatemala for the first time (63%) and used air transport(61%).

The most common purpose of visit was "Holiday (60%)," which was followed by "business and trade (11%)" and "VFR (11%)."

**c. Visitor types**

The half (52%) of the respondents came to Guatemala for "archeological sites." It is followed with a large gap by "living indigenous cultures (23%)" and "nature and wildlife (12%)." It is noted that only 8% of the respondents answered that "colonial cities and architecture" was their principal attraction, which was the lowest among the 5 origin market segments. It may reflect the market's familiarity with Spanish architecture.

Visited places and activities in Guatemala reflects aforementioned attractions, although "shopping of handicraft (53%)," and "local foods (45%)," and "museums (25%)" and "beaches (18%)" were relatively important compared with other markets. "Areas to visit again" highly concentrated in Petén (42%) reflecting its acute interest in archaeological sites. It is followed by Sacatepéquez – Antigua (24%), and Sololá (18%).

**d. Use of package tour**

10% of the respondents used a package tour purchased in their home country, which is relatively high. 9% purchased package tour in Guatemala or neighboring country.

**e. Use of accommodation**

Hotel was the most commonly used accommodation accounting for 84%. 15% used friends and relatives' homes.

**f. Travel itinerary and expenditure**

28% of the respondents visited Guatemala only, which is the lowest figure among the 5 origin market segments. Popular destinations combined with Guatemala were Mexico (34%) and Honduras (27%). The high percentage of the combination with Mexico may imply Cancun's function as a gateway to Guatemala.

Visitors from Europe spent \$3570 for 50 nights in average for a trip, (the "median" of the length of stay was 21nights), They spent \$1670 for 30 days in average while in Guatemala (the "median" of the length of stay was 15 nights). It means that the greater part of their expenditure was spent outside of Guatemala. Average daily expenditure for the whole trip was \$71, while that in Guatemala was \$54.

It is noted that the expenditure for the handicraft was \$457, which was the largest among the 5 origin market segments.

**(3) Competitor destinations**

The most important competitor destination of Guatemala was Mexico (29%). Considering a high percentage of visitors who combine Guatemala and Mexico and the common tourism theme of Mundo Maya, it could be regarded as a partner rather than a competitor.

**(4) Satisfaction level**

The most important aspect which the respondents didn't like were "Security(23%)" followed by " Environmental destruction(19%)." Although 89% of the respondents were hoping to visit Guatemala again, the figure was the lowest of the 5 market segments.

**3.2.4. Other Americas**

**(1) Volume**

"Other Americas" includes Central American countries other than neighboring countries (Nicaragua, Costa Rica and Panama), Caribbean and South American countries. Total volume of the market segment was 83,900 with an average growth rate of 9.1% during the 1996-2000 period.

**(2) Market characteristics**

**a. Demographics**

72% of the respondents were men, and 62% belonged to the age bracket of 20-39. 40% of the respondents were single. Respondents were well educated; 93% had a university or postgraduate degree.

**b. Travel behavior**

39% of the respondents visited Guatemala for the first time. The figure is lower than Europe and North America and higher than Neighboring Countries.

Almost half (46%) of the respondents were traveling alone. It is the highest figure among the origin market segments.

**c. Visitor types: purpose, attractions, and activities**

"Holiday" accounted for 37% of the purposes of visit, which was lower than any other origin market segments. It was followed by "business and trade (27%)," which was one of the highest among the market segments, and would explain a high share of those who travel "alone."

43% of the tourists came to Guatemala for "archeological sites," which was one of the highest among all the origin market segments. It was followed by "colonial cities and architecture."

The most important activities while in Guatemala were "colonial cities (45%)," "shopping handcrafts (45%)," "local foods (44%)," "archaeological sites (36%)," and "indigenous marketplace (34%)."

Responses to "Areas to visit again" were El Petén (45%) and Sacatepéquez – Antigua (31%).

**d. Use of package tours**

84% of the tourists traveled independently. 9% used package tour purchased in their home country, and 7% used package tour purchased in Guatemala or neighboring country.

**e. Use of accommodation**

Hotel accounted for 78%, while friends and relatives' homes accounted for 19%.

**f. Travel itinerary and expenditure**

The half of the respondents (53%) traveled only within Guatemala. Countries that are combined with Guatemala were El Salvador (17%), Mexico (12%), and Honduras (12%).

Visitors from the market spend \$2058 for 16 nights in average in a trip. They spent \$1188 for 12 nights in Guatemala. Consumption for handicrafts was \$243.

**(3) Competitor destinations**

Major competitor destinations were Mexico (26%) and Costa Rica (17%).

**(4) Satisfaction level**

Major items that "need improvement" or "strong need for improvement" were "environmental protection", "security", "tourist information" and "taxi service and public transport."

**3.2.5. Domestic Market**

Domestic market has tended to be ignored in the past, but its growing trend is visible according to the interviews with Guatemala's travel trade. It would be necessary to pay attention to this market segment, and to collect information necessary to develop the potential market.

Although the travel trade reports that the domestic market barely buys travel services within the country, some recreational facilities, beaches, and nature areas such as Amatique Bay, IRTRA in Retalhuleu, Monterrico - San José beaches, and even Cobán and its surrounding areas are growing with the increase of domestic tourists.

Length of stay for domestic market are 2-3 nights for business travelers, 3-4 nights for tourists in Petén, Amatique Bay, and Río Dulce and Izabal Lake (Mariscos and Playa Dorada), and 1-2 nights at Pacific beach destinations.

Efforts to promote the domestic market are not very active, but the market is important to reduce seasonal fluctuation of tourism establishments.

## **4. TOURISM ADMINISTRATION**

### **4.1. Laws and Systems Regarding Tourism**

#### **4.1.1. Law on Establishment of Instituto Guatemalteco de Turismo (INGUAT)**

The country promulgated Decree No.1,701 (Ley Organica del INGUAT) in October 1967 and the amendments (Decree No.22-71 in April 1971 and Decree 23-73 on April 1973) for establishing Instituto Guatemalteco de Turismo as an autonomous government organization. Its principle purpose and functions are stipulated in detail, but roughly fall under the following main groups;

- To prepare and execute the tourism development plan
- To foster and supervise tourism industries and tourism-related industries
- To prepare and implement the human resources development plan in the field of tourism
- To prepare and implement marketing, promotion and advertisement plans for the domestic and inbound market
- To collaborate with other ministries for providing necessary infrastructures for tourism
- To collaborate with other public institutions in charge of tourism activities

#### **4.1.2. Other Laws and Regulations for Tourism**

The country also has laws and regulations for the following purposes:

##### **(1) To regulate and control tourism activities to improve services quality**

- Regulations for the establishment of lodging facilities: Governmental Agreement No.1144-83 promulgated on December 29,1983
- Regulations for the registration and function of tourist guides: Agreement No.219-87 and its amendments promulgated in 1987
- Regulations for the registration of travel agents: Agreement No.269-93-D promulgated on December 28,1993
- Regulations for the registration of tourism information commercial companies: Agreement No.198-95-D promulgated on August 7,1995

##### **(2) To stimulate the private sector for domestic and foreign investment**

- Law for national tourism promotion (Decree No.25-74 of the Congress of the Republic) promulgated on May 28,1974
- Regulations for the application of Decree 25-74 (Government Decision No. M. de E.23-74) promulgated on November 20, 1974

- Law for the abolition of exemption and deduction in tax and physical matter (Decree No.117-97 of the Congress of the Republic) promulgated on December 23, 1997
- Law for foreign investment (Decree No. 9-98 of the Congress of the Republic) promulgated on February 20,1998
- Law for national tourist encouragement and its regulation

**(3) To protect the environment**

- Law for the environmental protection (Decree No.68-86 of the Congress of the Republic)
- Law for Protected Areas (Decree No.4-89 of the Congress of the Republic)
- Regulation for Environmental Impact Assessment)

**(4) To protect historic properties**

- Decree N0.26-97 (Law for the Protection of the Cultural Heritage of the Republic)
- Governmental Agreement No.15-98
- Governmental Agreement No. 229-99.

**4.1.3. Revision of Laws on the Establishment of INGUAT**

The travel trade in Guatemala agrees that the Decree No.1,701 (Ley Orgánica de INGUAT) should be revised and updated.

- ENT (National Tourism Strategy) proposes establishment of an Administration Commission composed of both the public and private sectors, functions of which should be direction and administration of INGUAT.
- Tourism Commission of the Congress is considering to revise the law on the establishment of INGUAT, and asked the travel trade for their opinions.

**4.2. National Tourism Strategy**

In 1995, a long-term plan called "Sustainable Tourism Development towards the Year 2005" was established by INGUAT with the following purposes.

- To diversify and complete tourist products,
- To attract and allocate investment in the sector as well as for infrastructures such as tourist service facilities,
- To strengthen promotion and marketing activities,
- To integrate communities both in efforts for tourism development and its benefits,
- To guide improvement of services and foster human resources training, and

- To promote preservation of culture and ecosystems.

However, this plan was not executed due to the change of the President of the Republic.

In 2000, a short-, mid-, and long-term plan called the National Tourism Strategy (hereafter abbreviated as ENT) was prepared by the Presidential Tourism Development Commission and INGUAT, taking into consideration of various tourism research papers, and announced as a government agreement on September 2000.

Their main objects are as follows:

**a. Position of tourism in Guatemala**

Tourism is privileged and recognized as a national project to be supported by the State within the productive activities of the country.

**b. Objectives of ENT**

ENT was prepared to present an *integral, balanced and long-term vision* concerning the national tourist sector, paying attention to the followings:

- Effective coordination between the public and private sectors,
- Different ethnic groups that co-exist in the country,
- Participation of local communities in the interests of tourism,
- Fostering of intercultural exchanges, and
- Conservation of the nature.

### **4.3. Systems of Tourism Administration**

#### **4.3.1. INGUAT**

INGUAT is a decentralized government organization created in 1967 under the Decree No.1701 with the aims to plan tourism development, foster and control tourist industries, promote domestic and international tourism, and coordinate among tourism activities.

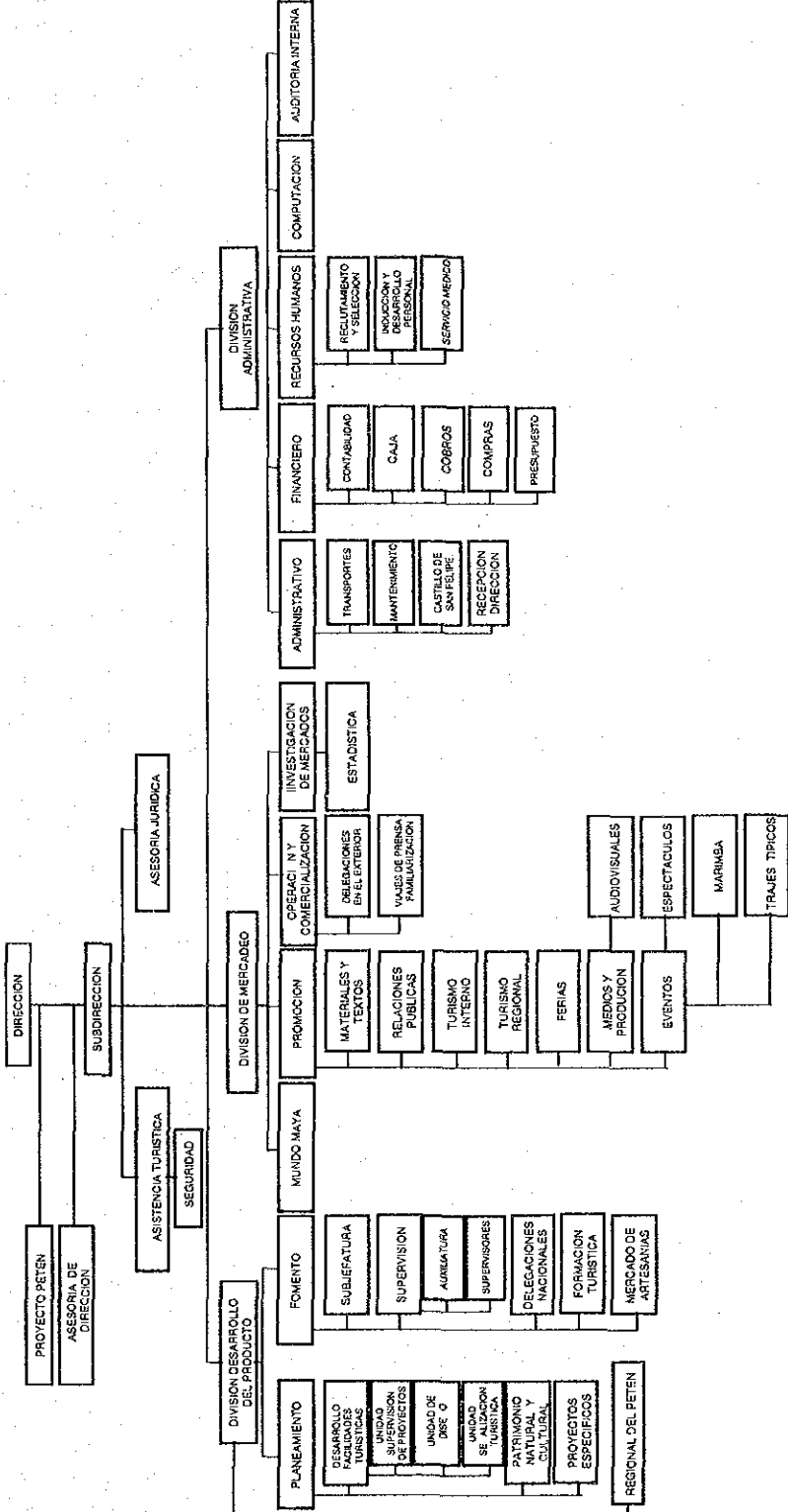
**(1) Organization of INGUAT**

- President of the Republic nominates the director and sub-director.
- The director represents the highest authority of INGUAT and the sub-director is second in hierarchy after the director,
- Product development, marketing, and administration coordinators are assigned to each department,
- INGUAT has 7 delegation offices located in the major tourist sites in Guatemala,
- INGUAT delegates its tourism promotion function to the embassies of Spain, France, Italy, Britain, and Germany. INGUAT delegates its promotion role to the embassies of USA, Mexico, Belgium, and Canada.

(2) Organization chart and number of staff

The organizational structure of INGUAT is shown in Figure 4.1.

Figure 4.1 Organization Chart of INGUAT



Source: INGUAT



The total number of staff including directors of INGUAT has decreased as shown below due to the efforts at reducing the scale of the government.

Table 4.1 Number of staff in INGUAT

	Unit: person					
	1996	1997	1998	1999	2000	2001
No. of official staff	267	255	250	226	210	198
No. of temporary staff	75	75	70	70	75	79
Total	342	330	320	296	285	277

Source: INGUAT

### (3) Tourism Advisory Board

Tourism Advisory Board is an advisory organization of INGUAT composed of representatives of INGUAT, other tourism-related ministries and the private sector. It was established in 1971 by Decree 22-71 but it has not functioned well.

### (4) Budgets for INGUAT

Revenue is generated mainly from the 10% tax levied on lodgings and 33% of the departure tax (\$30/person) in accordance with the Organization Law. Due to the rapid increase of international and Guatemalan outbound tourists, revenue from the departure tax has increased significantly. Tax revenue from lodging has been on a constant rise.

Table 4.2 Transition of Revenues

	Unit: Quetzal				
	1996	1997	1998	1999	2000
Airport	10,870,942	11,437,470	39,211,957	49,189,321	53,041,628
Maritime	97,970	178,061	1,788,871	1,028,214	342,010
By land	199,061	169,776	34,320	0	0
Sub Total	11,169,969	11,787,304	41,037,146	50,219,534	53,385,638
Lodging	22,497,540	25,727,050	28,622,918	36,515,832	40,151,891
Penalty	30,886	75,978	89,616	44,865	58,400
Interest	116,757	262,179	193,408	355,032	422,235
Tourist Card	4,147,436	715,983	366,073	195,444	0
Rent	122,900	91,698	84,563	39,736	25,264
Sales of Material	135,854	157,810	110,500	73,355	117,157
Rent local market	129,950	167,408	171,592	273,316	366,245
Entrance to Castillo	140,101	130,884	137,423	149,481	140,101
Folkloric	64,751	64,264	19,060	40,066	18,681
Sub Total	27,386,175	27,393,254	29,795,153	37,687,127	41,299,974
Total	38,556,144	39,180,558	77,736,702	87,906,661	94,685,612
Increase from previous year	-	101.6%	198.4%	113.1	107.7%

Source: INGUAT

Expenses have increased in proportion with the increase of revenues except in 2000. The share of expenses for tourism promotion is targeted at some 55% of the total expenditures.

Table 4.3 Transition of Expenses

	1996		1997		1998		1999		2000	
	Value	%	Value	%	Value	%	Value	%	Value	%
Investment	1,581,778	4.3%	2,936,037	6.8%	4,198,139	6.3%	2,792,013	3.4%	3,078,390	4.7%
Promotion	14,637,039	40.2%	19,773,433	45.6%	19,644,640	29.5%	50,211,760	61.6%	36,332,771	55.7%
Operation Cost	20,185,258	55.5%	20,619,699	47.6%	42,722,528	64.2%	28,450,561	35.0%	25,870,453	39.6%
Total	36,404,075	100%	43,329,169	100%	66,565,307	100%	81,454,234	100%	65,281,614	100%
Increase ratio	100%		119%		183%		122.4%		80.1%	

Source: INGUAT

**(5) Incentives for Investment**

Guatemala has been quite enthusiastic about inviting domestic and foreign investors into the tourism sector and promulgated Decree 22-71 in 1971, and Decree No.25-74 National Tourism Promotion Law in 1974. Major incentives were given such as exemption of the import tax of necessary materials, land tax, and 100% of income tax and so on. It was modified later in 1992. With this change, INGUAT is now preparing a revision of the National Tourism Promotion Law.

**4.3.2. Departments and Municipalities****(1) Roles of departments and municipalities**

Governors and mayors are to serve as delegates and are committed to render cooperation for fulfilling the objectives of INGUAT (Article 40 of the Organization Law of INGUAT).

Both governors and mayors designate one staff to provide information and necessary assistance to domestic and international tourists. INGUAT, on the other hand, provides brochures, guidebooks, maps and other advertisement articles to local governments.

The main functions of the municipality related with tourism development are as follows (Municipal Code Decree 58-88);

- Elaboration, approval, and implementation of urban and rural development plans in coordination with the National Development Plan and the Urban and Rural Development Committee System,
- Awareness creation for participation among the members of the Urban and Rural Committee,
- Creation, administration and regulation of local markets,
- Provision of municipal police service,
- Promotion and organization of popular festivals, and
- Protection of the rights of residents and communities for cultural identity in terms of value, languages, traditions and customs.

**(2) Local Tourism Committee**

The creation of the legal figure of the Local Tourism Committee was established in accordance with Agreement No.435-2000-D in November 2000.

**a. Definition**

The committee is an organization of the key local sectors, aimed to formulate and implement the development plan of the region based on wide participation and consent.

**b. Fundamental objectives**

- To promote decentralization and coordination of tourism activities, and
- To promote development of competitive local tourism sites.

**c. Principal functions of the committee**

- To formulate the tourism development plan of the region,
- To identify, give priority, and formulate projects,
- To manage technical and financial cooperation for carrying out programs and projects,
- To supervise programs and projects so that they are implemented appropriately,
- To coordinate with environmental organizations for management and disposal of solid waste and discharge of polluted water,
- To identify human resources necessary for tourism in the region, and
- *To plan and carry out tourism promotion and marketing activities for the region.*

**d. Members of the committee**

- Municipal and departmental authorities,
- Local enterprises,
- Community-organized groups,
- National institutions,
- International organizations, and
- NGOs.

**e. Institutional coordination by INGUAT**

- To advise in the formulation of tourism development plans,
- To provide technical assistance in identifying, determining priority and formulating projects, and coordination with other organizations which have the necessary knowledge, and

- To facilitate and guide the committee in negotiating with national and international organizations for technical and financial cooperation required to execute the regional tourism development plan.

These committees have been organized in the following municipalities since December, 2001;

Antigua, Quezaltenango, Peten, Chichicastenango, and Sayaxche, Salama, Coban, Lago de Atitlan and its surroundings, Rio Dulce, Livingston, El Remate, Melchor de Mencos.

### (3) **Institute of Municipal Strengthening (INFOM)**

Institute of Municipal Strengthening (Instituto de Fomento Municipal – INFOM) was established in 1957 as an autonomous government organization under the Decree 1132 in 1957, main purposes of which is to promote the progress of municipalities by providing technical and financial assistance to implement basic public works and service programs, rational exploitation of the municipal property and company, organization of the municipal treasury and administration, and in general, development of economic activities.

Last year, INGUAT started to work with CAMTUR and INFOM for developing a program called “Municipal Development y Tourist Culture.” Its main objective is to create awareness, among local inhabitants, of the importance of tourism and train them for development of local tourism resources.

## **4.4. Tourist Safety**

### **4.4.1. General Situation**

It is needless to say that safety and public order are the most important prerequisites for tourism. In other words, the greatest obstacle for tourists is the safety problem.

The civil war came to an end with the Peace Agreements concluded in 1996, and public order was restored. However, petty crimes in cities and on highways, and the mistreatment of foreign visitors in some cases have raised fears against crime. Concerns by the travel trade and tourists over this situation have had a negative effect on international arrivals, especially from the US market, which is one of the most important tourist-generating countries. However, a *travelers advisory* of the US State Dept., which had discouraged holiday travel to Guatemala, was lifted owing to the INGUAT efforts.

### **4.4.2. National Civil Police, Municipal Police**

In 1996 the National Civil Police was created following the Peace Agreements to replace the previous national police force. National Civil Police, which belongs to the Ministry of Internal Affairs, is in charge of protecting Guatemalan citizens and foreign tourists all over the country. The Peace Agreements on strengthening civil power states that civil police should cover the national territory with a minimum of 20 thousand agents by the end of 2000. However, there are actually only 16,767 agents due to the lack of human resources, finance, and materials. It is one of the major causes for insecurity.

Each municipality will have municipality police, if it considers that such police will be convenient for the municipality (Article 59 of Decree No.58-88 Municipal Code). In reality, very few of the total 331 municipalities in Guatemala maintain such police.

#### 4.4.3. Safety for Tourists

Various actions have been taken as regards tourism as follows:

##### (1) National Tourist Protection Program

This program was launched in 1996, and the Protection Cabinet has been created for promoting these initiatives. Members consist of the Vice Ministry of Internal Affairs, the director of INGUAT, the representatives of FUNDESA, CAMTUR, tour operators, transport companies, hotels, and airlines.

INGUAT works as the coordinator and facilitator between the tourism sector and National Civil Police. More specifically, tour operators send the information on the itineraries of their tour groups at least 72 hours in advance, which is channeled through an adviser of INGUAT to the Vice Ministry of Internal Affairs and National Civil Police so that these institutions can coordinate their staff and give instructions for guarding the specified tour groups.

In order to promote the program externally, INGUAT has diffused information to the private sector, consulates, embassy, departmental governors and the press. For the time being, 63 tour operators out of more than 100 registered in INGUAT are using this service.

Table 4.4 Results of National Tourist Protection Program

	1997	1998	1999
General Tourists	1,315	1,727	2,200
Cruise Tourists	---	25,000	28,500

Note: Unit: person

Source : INGUAT Annual Report

##### (2) Tourism Police of Antigua Guatemala

Tourism police was set up with the assistance of INGUAT, FUNDESA and the private sector in 1996. It consists of 40 policemen from the municipal police who cover the Antigua and tourist areas. Their function is taking care of, and guiding tourists to, Antigua.

#### 4.4.4. CAMTUR

CAMTUR, as a representative of the private sector, is very aware of the importance of tourist safety and formed the tourist safety committee as one of their committees in May, 2001. The function of the committee is to watch how the governmental authorities guarantee the safety of both Guatemalan and foreign tourists. Concretely it works with governmental organs, medias, local tourism committees, the congress, and the embassies.

## 4.5. Private Organizations Related to Tourism Development and Promotion

### 4.5.1. Private Associations and Chambers Related to Tourism

In Guatemala, there are various tourism associations or chambers representing the same interest group. The main ones are as shown below.

**Table 4.5 Tourism Associations in Guatemala**

Name	Year of establishment	Principal role and function	Main activities	Qualification	No. of members	Remarks
Hotel Union of Guatemala		Representation of the hotel industry against the Government	Various support to the members			
Guatemalan Association of Travel Agent (A.G.A.V)		Representation of the travel industry	Various support to the members			
Chamber of Tourism of Guatemala (CAMTUR)	1976	To defend freedom of business & interests of the associates To promote domestic & inbound tourism	To hold various seminars & events To appeal to the legislative body	Individuals and corporations engaged in tourism activities directly or indirectly	259	Target for increasing members: 450 for year 2002, 1,200 for year 2006
Guatemalan Association of Airlines (AGLA)	1965	To protect the interests of the airlines		Any airliner	16	Financial problem in operating the association activity
Foundation for Development of Guatemala (FUNDESA)	1984	To promote correct understandings of Guatemala	As for tourism, a program to strength small and micro enterprises		73	
Guatemalan Inbound Tour Operator Association (ASOPTUR)	1993	To protect the interests of the tour operator	To cooperate with CAMTUR concerning security office Hosting seminars	To have a minimum facility for tour operation etc.	22	
Tourist Guide Association of Guatemala (AGTA)	1995	Mutual cooperation among members To appeal to the Government to establish social security to guides		Any class of tourist guide to get license from INGUAT	130	In Peten there is different association of tourist guides Financially difficult

Source: INGUAT

### 4.5.2. Chamber of Tourism of Guatemala (CAMTUR)

CAMTUR was established in 1976 with the reorganization of the Guatemalan Association of Tourism. Although there was criticism for the Chamber from the members due to insufficient activities as the leader of the private tourist associations about three years ago, it is now a highly influential private tourism organization (civil, non-profitable) due to the efforts by the management. Its activities cover the entire Republic. Its associates are the 259 individuals or corporations (as of February 2001), comprised of tour operators, travel agents, tourist guides, airlines, hotels, other tourism associations and unions, tourism education organizations and so on.

Its head office is in Guatemala City and regional representatives can be found in Sacatepequez, Retalhuleu, Huehuetenango, Peten, Chichicastenango, Las Verapaces, Quezaltenango and Esquipulas.

The objectives of the organization are to promote tourism, develop human resources for the tourism sector, and provide good services to tourists.

Their main activities are as follows:

- To negotiate and cooperate with the Government and institution,
- To host seminars and courses for human resources development,
- To host various events and workshops for promotion, and
- To provide services to the associates.

#### **4.5.3. Relationship between the Private Sector and Public Sector**

##### **(1) Insufficient trust in INGUAT among the private sector**

The most serious complaint against INGUAT activities from the private sector is the frequent changes of policy that occurred when director changed. Promotion, for example, should be carried out from a long-term perspective by setting definite target markets. There have been a number of cases contrary to this principle as shown in an example that one director decided on giving priority to the US market for promotion while his successor changed it to Europe.

##### **(2) CAMTUR**

CAMTUR is required to share the responsibility with INGUAT to implement the strategy of ENT.

It is expected to play an important role as an organizer, mediator and representative of the various groups of the private sector, to serve as a communication channel between the public and private sectors, and to provide a concrete perspective of the tourism industry of the country so that the different programs to be implemented by INGUAT can contribute effectively to the development of the tourism sector.

In September 2000, CAMTUR organized the National Congress of Tourism 2000 in order to draw up the Action Plan (short-, medium- and long-term) for strengthening the development of the tourism sector.

#### **4.6. Human Resources Development**

##### **4.6.1. Organization for Human Resources Development for the Tourism Sector**

Other than in-house training provided by private companies, training and education for the tourism sector at various education levels are provided at the following organizations;

**Table 4.6 Organizations involved in tourism training and education**

Organization	Education Level	Remarks
INGUAT	Awareness program	
INTECAP	Basic, middle (practical)	All over the country
University	High (theoretical & practical)	
Vocational high school	Middle	
Private tourism associations	Middle	Mostly for their own members

Source: JICA Study Team

#### 4.6.2. INGUAT

The principle policy of INGUAT is to raise the people's awareness of the importance of tourism in Guatemala, and improve the quality of services in the tourism sector. For that purpose, it plays a role as a coordinator among tourism education organizations, and also holds the following awareness programs on a regular basis for the police and taxi drivers, as well as other courses as required.

- La calidad soy yo (I am the quality),
- Excelencia en el Mundo Maya (Excellence in the Mayan World),
- Cultura Turistica (Tourism Culture), and
- Cultura Turistica Infantil (Tourism Culture for Children).

**Table 4.7 Results of courses organized by INGUAT**

	1997	1998	1999	Total
No. of courses	40	113	125	278
No. of Participants	974	3,519	5,740	4,533

Source: INGUAT

#### 4.6.3. Technical Institute of Training and Productivity (INTECAP)

##### (1) Outline of INTECAP

INTECAP was established as a decentralized governmental organization in 1972 by Decree No.17-72, main objective of which is to develop human resources and increase productivity. It is a leading institute engaging in the professional training of workers in Guatemala. This organization is financed mainly by 1% of wages paid to workers by enterprises. Therefore, all the trainings provided at INTECAP is free of charge. Its main tasks consist of the followings.

##### a. Professional training

At operational, medium and administrative levels, covering the three main economic sectors.

##### b. Technical assistance

INTECAP provides technical assistance for private companies to solve problems related to administration, finance, production, marketing, and project development.



**c. Provision of technical information and data**

Training is provided to participants from young novice to senior experienced workers throughout the country, which is divided into 6 regions, with 268 courses in a year.

**Table 4.8 Transition of participants and number of cases of technical assistance**

	1996	1997	1998
Participants	72,247	94,769	114,758
Technical assistance	872	1,080	2,421

Source: INTECAP

**(2) Tourism Sector**

Strengthening of human resources development for the tourism sector is one of the principal strategies of INTECAP since 1999.

- Tourism courses consist of the three areas: tourist services (tour guide), hotel industry, and food and beverage.
- Each area has its own courses totaling 26 for the year 2000. It ranges from a 30-hour course for housekeeping to 445-hour course for general tourist guide. Requirements for participating in courses are a combination of different conditions such as age, school career, personality, and the pass of entrance examination, which differs depending on the course. Permanent instructors are 4, and about 70 instructors are additionally hired on a contract basis.

**a. Guide carrier course**

Courses are provided for respective guide classifications specified in Agreement No.219-87 (Regulations for Inscription and Function of Tourist Guides), that is, local guide, general guide and specialized guide. Concretely, the courses provided in 2000 are as follows:

- General guide: 480 hours, and
- Local guide (Central Zone, South Zone, Las Verapaces, West Zone, Northeast Zone, Route Maya): From 205 hours to 240 hours.

**b. Specialized guide: Ecotourism**

Participants who have successfully finished the course are certified by INGUAT as tourist guide in Guatemala.

**Table 4.9 Numbers of participants**

Course	1999	2000
Food & beverage , hotel	7,232	6,452
Tourist service	2,085	1,160
Total	9,317	7,712

Note: The decrease in the number of participants from 1999 to 2000 is due to the discontinuity of courses for housewives, which apparently were not conducive to production increase.

Source: INTECAP

### c. Project of a new tourism training center

In addition to the training at the existing facilities at INTECAP, a project to establish a new tourism training center in Guatemala City was approved in 2000 to comply with the demand from the private sector. The outline of the project is as follows.

#### Main objectives

- To implement integral training programs with up-to-date methodology and technology.
- To provide more people with chances of training (projection: about 12,000 participants in total from 2002 to 2006)

#### Carrier courses:

New courses for travel agents and airline companies will be provided in addition to the traditional courses for hotel, food & beverage and tourist guides.

#### Strategy:

Train- the - trainer course will be established in order to let the trainer obtain new technology and knowledge.

### 4.6.4. Universities

Tourism education for tourism management is offered mainly at national and private universities. One of their main aims is to replace expatriate managers in big hotel chains in Guatemala with their graduates.

The curriculum is drawn up based on their own knowledge, experience, and references of texts of many foreign universities, taking into account actual demand in Guatemala as defined by INGUAT. Many of the universities have a cooperative relationship with CAMTUR and INTECAP.

There are 7 universities in Guatemala, which provide tourism courses as follows:

**Table 4.10 Tourism Courses in Universities**

Name of university	Faculty or course	Number of professor	Number of students	Name of principal courses	Year of foundation
San Carlos (Peten)	n.a.	n.a.	n.a.	Ecotourism	n.a.
Landivar	Economics	22	176	Hotel administration	1995
Del Valle	Science & Humanity	4	67	Ecotourism	1991
Panamericana	n.a.	n.a.	n.a.	n.a.	n.a.
Istmo	Administration	60	200	Hotel administration & tourism	1998
Mariano Garvez	n.a.	n.a.	n.a.	n.a.	n.a.
Galileo	Information & Administration	6	150		1996

Source: Equipo de Estudio JICA

### 4.6.5. Colleges (Diversificado)

Colleges (Diversificado) in Guatemala offer education for professional middle-class careers according to the Fundamental Educational Law promulgated in 1958. There were

1,462 colleges in Guatemala as of 1999, most of which are private. Vocational education covers the industrial area, commercial and services areas, and agricultural and animal breeding areas. Each area offers various specialty fields. Students are given both theoretical and practical educations. Graduates are given senior vocational diplomas and are distinguished as mid-level technicians, who are between the ranks of skilled labor and a high-level technician.

Education in tourism started in 1980 at one of the private colleges in Guatemala City. In recent years, the number of private colleges engaged in tourism education has increased rapidly to about 20, especially in the capital.

A professional association was established last November in order to oversee the members for improving the contents of education and maintaining the requisite level.