

SPOTLIGHT LATIN AMERICA

CONSOLIDATED MARKET RESEARCH



SEPTEMBER 2004

U.S. COMMERCIAL SERVICE

September 2004

Dear U.S. Travel Industry Executive:

Despite the recent setbacks the travel industry worldwide has faced, the Latin American region has proven to be among the most resilient markets for inbound travel to the United States. Given its geographic proximity and cultural, historical and familial ties with the United States, the countries throughout Latin America represent a significant market for the U.S. travel and tourism industry.

To reflect the importance of this market, the U.S. Commercial Service created a regional travel and tourism initiative entitled "Spotlight Latin America" to consolidate our efforts to help the U.S. travel and tourism industry more effectively. This report features market research throughout the region on travel trends, travel data, travel preferences and more. By providing a comprehensive selection of market research, U.S. travel and tourism companies will be better able to understand the various markets throughout Latin America and tailor their marketing efforts accordingly. Next year our goal is to incorporate all market research onto CD Roms for U.S. firms – stay tuned.

Additionally, Spotlight Latin America participants meet twice annually to discuss travel industry trends in the region and how to better serve our U.S. clients. Although our respective markets are very different, we all face similar obstacles – and advantages – that make regional cooperation worthwhile. Since countries in the region rely on travel agents as opposed to internet bookings and confront visa issues, the Spotlight Latin America initiative will help the U.S. industry better work in these markets.

As the leaders of the Spotlight Latin America Initiative, we welcome your input and feedback. We urge you to consider this important region, one that is predicted to increase international visitation to the United States in the next few years. Please feel free to get in touch with us to discuss your needs for the region.

Sincerely,

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ARGENTINA

MARKET OVERVIEW

Three years after the global drop in travel and tourism following September 11th and the default and devaluation that created a widespread economic crisis in Argentina, the tourism market has slowly been recovering. Business travelers were the first group to resume visits to the United States; however, many Argentine tourists are now choosing to fly to the United States. In fact, during 2003, 150,700 Argentine passengers traveled to the United States.

Before 2001 the travel market in Argentina grew 4.5 percent per year for a total of 534,200 arrivals during 2000-01. During the last decade, the local travel market grew 124 percent and ranked among the top ten countries sending tourists to the United States. Previously Argentines chose to travel to the United States because it was cheaper than Europe (ethnic destination). Argentines are big shoppers, and they spent almost twice as much as European tourists when visiting the United States: \$1,600 per traveler excluding air-tickets.

Since the devaluation, it is estimated that the Argentine tourism to the United States has fallen 60 percent; however, Argentine travelers still spend \$1,000, excluding air-tickets, on an average ten-day visit to the United States.

Argentina is now recovering from the economic crisis, which did not change the fact that traveling is part of the Argentine lifestyle. Luxury travel is a best prospect, which proves the growth in travel to European destinations. Nowadays Argentines are traveling to European countries, which are promoting their destinations aggressively and the amount of tourists have quickly returned to the levels seen in the 90s. However, the rise in the Euro makes the United States a desirable destination. Business travel is also a growing segment and their object is to visit exhibitions covering all industry sectors. Moreover, 90 percent of Argentine applicants for U.S. visas are approved.

Statistics for this year, 2004, show a very promising growth, as there has been a 25 percent increase between January and May amounting to 70,000 Argentine tourists.

The Open Skies Agreement between Argentina and the United States and the launch or reopening of various gateways in Washington D.C. and Dallas, Texas in addition to New York and Miami has been a key factor in increasing Argentine tourism to the United States. More gateway openings to Chicago and Atlanta are planned for this year. Flights to all United States gateways are generally full and booked well in advance.

The top destinations visited by Argentines are the State of Florida, the City of New York, Boston, the State of California, Chicago, Washington DC, Atlanta and Las Vegas.

The Visit USA Committee and the U.S. Commercial Service in Buenos Aires are aggressively promoting the United States as a tourism destination to Argentine travelers to increase U.S. Market share.

MARKET PROFILE

Consumer and Supplier profiles

Argentine consumer behavior is very peculiar and not comparable with other Latin Americans. They love shopping, are influenced by TV, general press and lifestyles of the rich and famous. They are typically last minute buyers, frequently change their minds and are extremely price conscious.

Individual traveler

Attached to car rental services
Prefers luxury quality hotels
Hotels must have international brand recognition
Look for preferential treatment
Always insist on the best value for money
Average stay per city is three-four 3 to 4 nights.
Usually purchase tickets on site for attractions, optional excursions, etc
High class and rich argentine and middle class businessperson

Wholesale Travel Supplier

Mainly medium to large-sized family companies and joint ventures
Print own brochures and materials (twice a year)
Fully computerized with Internet Access
Have web sites
Travel Suppliers of multi-destinations, not exclusively devoted to United States

Retail market

3500 retailers, 60 percent concentrated in Buenos Aires and other major cities: Cordoba, Rosario, Mendoza
Family companies
Sales diversified to different market niches: corporate, business, leisure, incentive, congressional and special interest
Mainly computerized with internet access
Regular local trade shows attendees (Destino USA, Visit USA, FIT, etc)
Informed by daily and weekly travel trade journals / magazines / e-mail news, wholesaler private shows, presentations, product launching and all sort of events

Global Distribution Service Market penetration: extremely well positioned (Utell, SRS, Hilton Reservation System, Leading Hotels of the World, Apollo, Sabre, Amadeus, etc)

STATISTICS

Historically Argentina is one of the countries that generated most tourism to the United States. The total increase during 1992–1999 was 124 percent, placing Argentina within the top ten countries generating tourism to the United States.

During 2000 Argentina generated the highest percentage increase and exceeded the forecasted growth rate resulting a total of 534,000 arrivals to the United States. Argentines spent \$1,600, excluding air tickets. During 2001 when there was a global drop after post September 11th Argentine tourism to the United States decreased 17 percent, which was less than the decrease in other top countries generating tourism to the United States.

Top 15 generating countries for the United States in 2000 and 2001

(in thousands)

2000	COUNTRY		2001	COUNTRY	
Rank		TOTAL ARRIVALS			TOTAL ARRIVALS
1	JAPAN	5,061	1	UNITED KINGDOM	4,199
2	UNITED KINGDOM	4,703	2	JAPAN	4,124
3	GERMANY	1,786	3	GERMANY	1,346
4	FRANCE	1,087	4	FRANCE	935
5	BRAZIL	737	5	SOUTH KOREA	626
6	SOUTH KOREA	662	6	VENEZUELA	570
7	ITALY	612	7	BRAZIL	569
8	VENEZUELA	576	8	ITALY	491
9	NETHERLANDS	553	9	AUSTRALIA	445
10	AUSTRALIA	539	10	ARGENTINA	443
11	ARGENTINA	534	11	NETHERLANDS	432
12	ROC (TAIWAN)	457	12	CHINA	405
13	CHINA	452	13	COLOMBIA	380
14	COLOMBIA	417	14	TAIWAN	361

15	SWITZERLAND	395	15	SPAIN	325
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During 2002 and after a very difficult year of default, devaluation, banking restrictions and foreign exchange controls and the conclusion of the Visa Waiver Program, Argentine tourism to the United States fell approximate 60 percent.

At present the travel and tourism market in Argentina is growing rapidly and an each Argentine spends approximately \$1,000 on an average 10-day visit. During 2003 Argentina generated 151,000 arrivals to the United States.

Top 26 tourism-generating countries for the United States in 2003
Argentina is placed 22nd

COUNTRY	TOTAL ARRIVALS	COUNTRY	TOTAL ARRIVALS
UNITED KINGDOM	3,936	INDIA	271
JAPAN	3,170	IRELAND	254
GERMANY	1,180	ISRAEL	249
FRANCE	689	TAIWAN	239
SOUTH KOREA	618	SWITZERLAND	230
ITALY	409	SWEDEN	211
AUSTRALIA	406	CHINA	157
NETHERLANDS	374	PERU	154
BRAZIL	349	BELGIUM	151
VENEZUELA	284	ARGENTINA	151
SPAIN	284	PHILIPPINES	134
COLOMBIA	280	DENMARK	125

Argentina is now recovering from the economic crisis, which did not changed the fact that traveling is part of the Argentine lifestyle.

Nowadays Argentines are traveling to European countries, which are promoting their destinations aggressively and the tourists have quickly returned to the levels seen in the 90s. However, the rise in the Euro and the proximity of the United States makes it a desirable destination. Moreover, 90 percent of Argentine applicants for U.S. visas are approved.

Statistics for this year, 2004, show a very promising growth, as there has been a 25 percent increase between January and May amounting to 70,000 argentine tourists.

Source:

- Office of Travel and Tourism Industries – International Trade Administration – U.S. Department of Commerce
- Travel Industry Association of America (TIA)
- Argentine Secretariat of Tourism

CARIBBEAN COUNTRIES

Travel and Tourism: The Caribbean Region

Introduction

Travel from the Caribbean region to the United States is expected to maintain the same levels or increase slightly in comparison to 2003. With slight improvements in the Jamaican economy and strong, stable economic indications from Barbados and Trinidad & Tobago, there is an expected increase in the travel and tourism sector. These expected increases should overcome economic difficulties currently being endured by the Dominican Republic.

Although the overall number of arrivals from the Caribbean region decreased in 2003, the decrease was proportionally less than the three previous years. The travel from the Caribbean region to the United States primarily presents opportunities to the hotel, restaurant, and transportation industries.

Facts and Figures

According to statistics gathered by the U.S. Department of Commerce's Office of Travel and Tourism Industries (OTTI), about half of all travelers from the Caribbean region use Miami as a starting point for their journey in the United States. Another one-third of the visitors from this region use New York as a gateway to the United States. Between New York and Miami, 800,000 people used these ports as entry points to travel to surrounding areas or to fly to another domestic U.S. destination. The remaining 20% of the visitors entered the U.S. from other locations around the country.

Air travel by Caribbean passengers within the borders of the United States has doubled since 2003, indicating that the visitors are making more stops during their visit. About 30% of the travelers, representing a total of 300,000 people, rented a vehicle in the U.S. An additional 30% used a company or private vehicle.

In the chart below, the results from the OTTI indicate that 50% of all travelers that go to the United States go to visit relatives and friends and another half go for vacation. A quarter of the travelers from the region were in the United States for business purposes.

	2003	2002
Purpose of Trip: (multiple response)		
Visit Friends and Relatives	50%	54%
Vacation / Holiday	50%	50%
Business	26%	27%
Attend Convention	9%	7%
Types of Transportation Used in U.S.: (multiple response)		
Company or Private Automobile	34%	36%
Rented Automobile	31%	31%
Airline in U.S.	21%	11%
Bus between Cities	6%	7%
Rail between Cities	5%	8%

The average length of stay in the United States was up from 11.1 days in 2002 to 12.7 days in 2003. Although the dollar amount spent per day decreased by \$17, this decrease is more than overcome by the additional revenues gained from the extra day spent in the country.

CHILE

TRAVEL AND TOURISM SERVICES INDUSTRY SECTOR ANALYSIS 2004

SUMMARY

The Chilean Civil Aviation regulator said on August 3, 2004 that Chile handled 1.79 million passengers in its international air traffic during the first semester of 2004, an increase of 10 percent compared to the previous year.

During the first quarter of 2004, the main overseas destination for Chilean travelers was the United States. A total of 90,060 Chileans traveled during that period, compared to 82,247 travelers during the same period in 2003, representing an increase of 9.5 percent. Within the United States, Miami was the preferred destination, with a total of 37,106 arrivals during the first quarter of 2004.

The major travel season is during the Chilean summer months of January and February. Approximately 30 percent of total Chilean travel is done during these two months when Chileans take vacations with their families. Second and third travel seasons are the months of July and September, which are the winter and spring breaks. During the first two months of 2005, the amount of travelers is expected to increase by up to 30 percent compared to 2004.

The United States attracts Chilean travelers because of its excellent tourism infrastructure, shopping, entertainment, and recreational activities, including beaches and family attractions. Latin American countries remain the primary competitive destinations for the United States due to low travel and living costs.

A. MARKET PROFILE

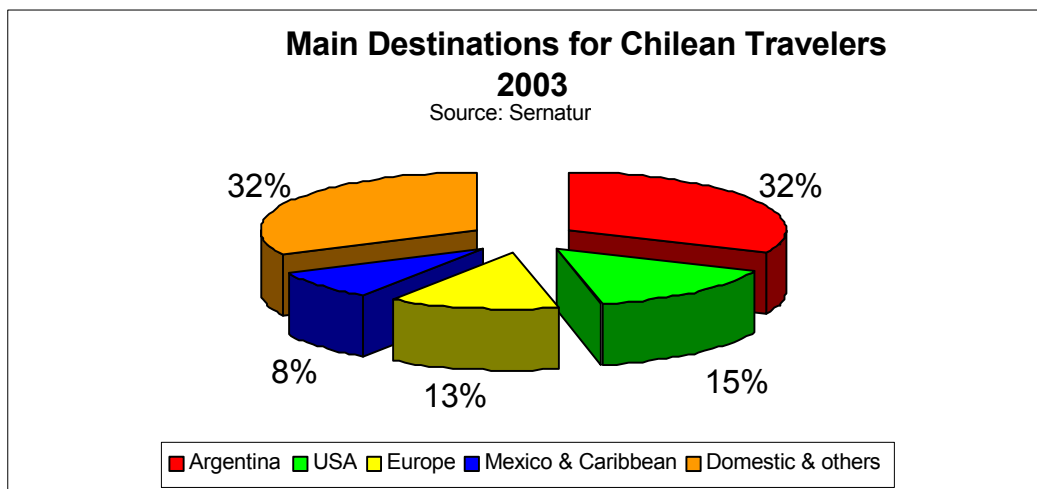
- ▮ In general, Chileans prefer to use a travel agent to coordinate their travel.
- ▮ Tourism wholesale operators provide their services and products through travel agents.
- ▮ An increasing amount of travelers are using the Internet for travel reservations.
- ▮ Chilean wholesalers establish agreements with other international wholesalers in the United States and in other countries.
- ▮ In order to offer more attractive packages price-wise, wholesalers make exclusive arrangements directly with airlines, hotels, cruises and others.

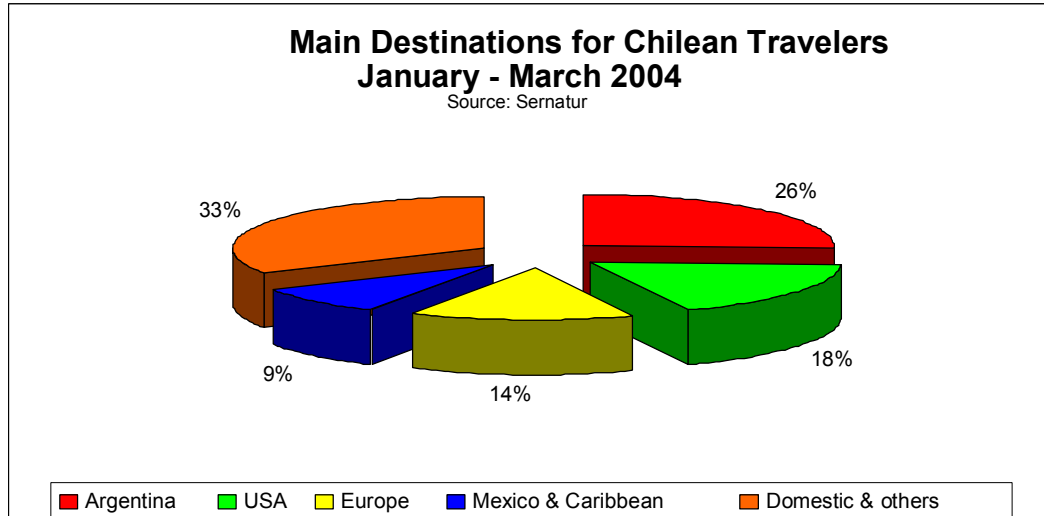
1. TOTAL MARKET

	2002	2003	2004(Jan-Mar)
TOTAL OUTBOUND TRAVELERS	1,937,510	2,100,203	747,077
TOTAL INBOUND TRAVELERS	1,412,315	1,613,523	734,581

2. MAIN DESTINATIONS FOR CHILEAN TRAVELERS

	2002	2003	2004(Jan-Mar)
Argentina	442,813	548,522	127,686
USA	281,777	257,709	90,060
Europe	228,100	220,174	71,334
Mexico & Caribbean	140,886	145,069	44,658





3. MAIN U.S. DESTINATIONS FOR CHILEAN TRAVELERS

	2002	2003	2004(Jan-Mar)
Miami	117,265	113,201	37,106
New York	23,850	23,808	8,263
Dallas	37,067	39,552	16,198
Los Angeles	29,196	31,735	10,772
Atlanta	35,249	48,817	14,086

COLOMBIA

Despite all of its social and political problems, there are very positive signs that lead to optimism about the recovery of the Colombian economy. The security and economic plans of the government have fostered investors' confidence, and most economic indicators show positive results. Other reasons for optimism are the Free Trade Agreement (FTA) that Colombia is negotiating with the United States and the hope for a total integration of the Americas with a very significant expansion of the markets for those sectors, in which Colombia is competitive. The expanded markets would necessarily lead to an increase in business traveling.

The United States is Colombia's largest trading partner. It is also an attractive destination for Colombian pleasure-oriented travelers, motivated by such factors as shopping opportunities, the attraction of a different lifestyle, and visiting friends and relatives. Also, the peso/dollar exchange rate has experienced a revaluation since the end of 2003. This factor has caused a positive impact on outbound travel due to a reduction in travel costs.

Many travelers, however, are selecting other countries for their vacations plans. South America, especially Argentina and Brazil, have become increasingly popular destinations for Colombians. The fact that no visa is required for these countries, and they offer promotions with very good rates and all-inclusive packages, make these areas attractive alternatives.

The U.S. share of Colombian passengers traveling abroad during 2003 was 40 % of the total outbound market, followed by South America with a 26 % share, Central America (including Mexico/ Caribbean) with 21%, and Europe with 12%.

During 2003, the main U.S. gateway for Colombians was Miami, Florida with approximately 374,220 arrivals (63%); followed by New York City with about 59,400 arrivals (10%); Atlanta, Georgia, with approximately 41,580 arrivals (7%); Houston, Texas with some 29,700 arrivals (5%); Puerto Rico with approximately 5,940 arrivals (1%); and others, including Los Angeles and Newark with approximately 83,160 arrivals (14%).

Currently, there are five major airlines that provide direct daily flights between Colombia and the United States. They are: Avianca (Colombian); American, Continental, and Delta Airlines (U.S.); and Lanchile (Chilean). Additionally, there are also connecting flights to Orlando, via Panama through COPA, and via Costa Rica with LACSA.

Travelers from Colombia to the United States fall into four main categories based on the purpose of their trip: business (50%); visits to friends and relatives (28%); leisure (20%) and study (2%). Currently, 80% of Colombians travel to the United States on a repeated basis. Families traveling for the first time generally prefer to purchase tour packages from a travel agency.

Colombians have 15 working days of statutory paid vacation per year. Leisure travel usually takes place during school vacations (November to early February); during Holy Week (the week before Easter); and from June to early September. The average expenditure of the Colombian traveler is US \$200 per day (excluding airfare), and travelers spend an average of seven nights in the U.S. If they have relatives, their average stay is three weeks.

The influence of American culture on Colombian society is evident throughout the country and Colombians will look to the United States as their first-choice vacation destination, but it now appears that the travel figures to the United States might suffer a slight decline. The new visa regulations implemented worldwide after 9/11 may be an obstacle for the promotion of U.S. travel and tourism. The longer and more complicated process for some, and the higher fee required for a visa application for all, tend to discourage Colombians from traveling to the United States.

The United States is Colombia's main foreign trade partner. During 2003, Colombian exports to the United States totaled US \$5.7 billion (44% of the total), while Colombia imported from the United States US\$4.1 (an estimated 30% of its total imports).

There are very positive signs that lead to optimism about the recovery of the Colombian economy that was affected by a significant recession during 1999-2002. GDP increased by 3.6% during 2003 and is expected to grow by 4.1% during the current year. The security and economic plans of the government have fostered investors' confidence and most economic indicators show positive results.

U.S. companies can succeed if they are willing to look for ways to take advantage of these opportunities through the establishment of a local representative or agent that can market and promote the U.S. destinations throughout Colombia. Encouraging travel agents to market and promote the United States will be crucial since many have diverted their promotions to South and Central America and the Caribbean. Due to U.S. visa issues, effective promotion is essential in attracting Colombians to explore non-traditional destinations. Local operators and airline companies, brochures and pamphlets presented in Spanish, advertisements, special reports in local newspapers and travel magazines are excellent vehicles for providing information to potential tourists.

To enhance the United State's efforts to promote tourism and U.S. destinations, the Visit USA Committee Colombia together with the Commercial Service encourages and recruits its own pavilion within the largest and most important tourism trade show –ANATO– (Colombian Association of Travel Agencies). The next event will take place February 28 through March 2, 2005.

COSTA RICA

The Association Visit USA – Costa Rica Trade Show

Recent Successes

The Visit USA Committee Costa Rica recently held its 14th annual Visit USA Trade Show, which brought together major suppliers representing the United States travel industry. The attendance at this event exceeded expectations, attracting more than 450 visitors (travel agents, tour operators, and other trade representatives) interested in promoting U.S. destinations and doing business with United States of America. The U.S. Commercial Service in San José works closely with the Committee to promote this event.

U.S. participants this year included Alamo/National Vanguard Car Rental; Burdines-Macy's; Aventura Mall; Compañía de Turismo de Puerto Rico; Capital Hotels and Suites; Children's Concierge, LLC; Greater Washington Ibero American Chamber of Commerce; Guide Service of Washington, Inc.; Holiday Inn Capitol; Louisiana Office of Tourism; New Orleans Convention and Visitors Bureau; Meson Dupuy Hotel; Metropolitan Washington Airport Authority; Prime Hospitality; Union Station dba John Jones Lang LaSalle; Washington D.C. Convention and Tourism Corporation; AVIS-Budget Rent a Car; Dollar Rent a Car; and Washington Plaza Hotel.

The Committee also organized several professional development seminars for associates and travel professionals on the margins of the trade show and at other times during the year.

Background

The Association Visit USA – Costa Rica was established in 1991. The association is based on the common interest of several Costa Rican tourism-related businesses to

promote the United States of America as a major tourism destination--and close to 600,000 Costa Ricans visit the U.S. every year. CS Costa Rica works closely with the Committee to promote and organize this event.

The association is composed of airlines, car rental companies, hotels, cruise businesses, general sales agents (GSAs) in Costa Rica of U.S. tourism companies, and tour operators that market travel services into the United States of America. Its main purpose is to promote the United States as a tourism destination by organizing the annual Visit USA - Costa Rica Trade Show, in San José, Costa Rica. This event has grown steadily since the Committee was founded. The Committee is currently made up of 31 Costa Rican companies, and five international members (U.S. Conventions and Visitors Bureaus, or CVB's).

Objectives/Services

The Association works to:

- Promote travel destinations in the United States of America through seminars, familiarization trips, newsletters and other communication efforts.
- Organize and promote participation in the annual Visit USA Trade Show, which serves as a marketing event for tourism organizations and businesses that market travel services into the United States of America.
- Provide general information about traveling in the United States.
- Organize several professional development seminars for associates and travel professionals.

Future Events

Plans are already under way for next year's "Visit USA" Trade Show, which will take place on August 5, 2005, at the Radisson Europa-Zurquí Hotel in San Jose. This event will continue to be "Visit USA"-Costa Rica's biggest activity of the year. CS Costa Rica will be happy to facilitate the participation of CVB's and other U.S. travel and tourism organizations in the show.

Why is Visit USA Committee Costa Rica important to the U.S. tourism service provider?

The "Visit USA" Committee Costa Rica is the only Costa Rican association promoting U.S. tourism industry services. The "Visit USA" Committee Costa Rica is a recognized organization by the Travel Industry Association of America (TIA) and serves as an excellent contact for U.S. firms in the tourism sector to promote and sell their products and services.

Contact Information

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MEXICO

I. EXECUTIVE SUMMARY

The United States is the most important destination for Mexican travelers. In 2003, more than 9.6 million Mexicans traveled to the United States, representing 23% of the total foreign arrivals to the country. Mexico is the second source of international travelers to the United States just after Canada.

Compared to 2002, the number of Mexicans who traveled to the United States declined by 1.4%, mainly due to the sluggish economy and changes to visa regulations designed to increase security. However, Mexicans spent more in 2003 than 2002, which demonstrates that they are spending more although traveling less. This has significant implications for U.S. destinations. Additionally, Mexicans are still attracted to the wide range of activities and services that the United States offers to all its visitors such as: shopping, entertainment, gambling, recreational activities, and cosmopolitan cities. Additionally, Mexicans travel frequently to the United States in order to visit friends and relatives.

Mexican travel can be classified into four categories: vacation, business, visiting relatives or friends, and attending conventions. Approximately 1.3 million Mexicans traveled to the United States via air in 2003. According to the Office of Travel and Tourism Industries (OTTI) at the U.S. Department of Commerce, Mexican travel is officially forecast to increase by 3% in 2004 to 9.97 million visitors, and by 15 percent from 2003 through 2007, to almost 11.1 million visitors.

Wholesale operators continue to be the most important distribution channel in the Mexican travel and tourism market. It is crucial to establish and maintain a personal relationship with the travel and tourism companies located in Mexico in order to increase sales. With a low internet penetration rate and lack of confidence in credit cards, Mexicans heavily rely on travel agents to plan vacations.

The major travel seasons for Mexicans are the summer months of July and August and Easter and Christmas seasons. The most important competitors for the United States are Mexican destinations, due to the facilities and attractions within Mexico. International competitors include Canada, Europe and, more recently, South American countries such as Argentina, Chile and Brazil.

II. STATISTICAL DATA

During 2003, the stagnating performance of the Mexican economy generated a decline of Mexican travelers to the United States by 1.4% compared to the 2002 level. Therefore, Mexican travelers to the United States totaled 9.6 million. However, it is important to mention that this decline was less than the 4% decrease in overall international arrivals for 2003 in the United States. The Mexican tourist market has proven to be among the most resilient to outside factors impacting travel to the United States. The following chart shows recent arrival trends from Mexico to the United States via air:

CHART 1
MEXICAN ARRIVALS TO THE U.S. VIA AIR
TRENDS IN ARRIVALS (in thousands of people)

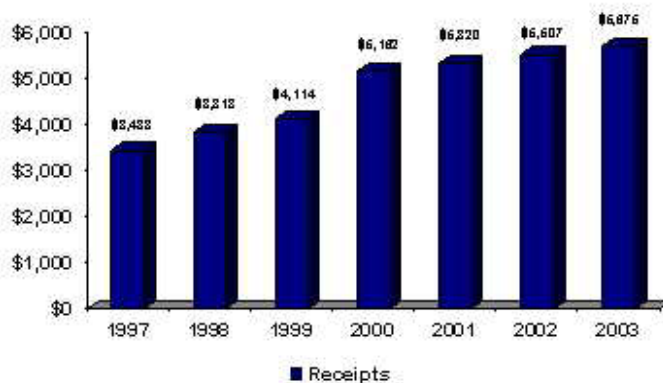
YEAR	1997	1998	1999	2000	2001	2002	2003	Change 2003/1997
Total Arrivals	8,431	9,276	9,915	10,322	9,558	9,807	9,670	1,239
% Change	-1%	10%	7%	4%	-7%	3%	-1%	15%
Air arrivals	1,304	1,421	1,489	1,737	1,513	1,437	1,359	55
% Change	19%	9%	5%	17%	-13%	-5%	-5%	4%

Source: U.S. Department of Commerce, ITA, Office of Travel and Tourism Industries; Bureau of Economic Analysis.

From 2002 to 2003, the ratio of passengers arriving by air to passengers arriving by land stayed constant. Approximately 1.3 million people arrive by air and 8.3 million arrived by land in 2003. However, most travelers by land are traveling to visit family while air passengers are divided principally among pleasure travelers and visits to family.

During 2003, spending by Mexican travelers totaled \$6.8 billion, with almost \$5.6 billion spent by air travelers. This figure shows the economic importance of Mexican air travelers. U.S. travel and tourism companies should consider this in their efforts to prepare marketing strategies and promotional packages to potential Mexican tourists. The graph below shows a steady trend of increased spending by Mexican travelers:

CHART 2
MEXICAN ARRIVALS TO THE U.S. VIA AIR
TRENDS IN RECEIPTS (in millions of Dollars)



SOURCE: U.S. Department of Commerce, ITA, Office of Travel and Tourism Industries, Bureau of Economic Analysis.

OTTI statistical research reveals that of all the U.S. regions, the Pacific and West South Central maintained the largest market shares for Mexican travelers. Within these regions, California remained the most frequently-visited state with 27.3% of the market in 2003. Nevertheless, the most popular cities, Los Angeles with 21.6%, Miami with 11.4%, and New York 9.8%, are distributed among 3 states. The following tables shows the top destinations for Mexicans:

CHART 3
MEXICAN AIR VISITATION ESTIMATES
 (Market Share and Volume in thousands of people)
VISITATION TO CENSUS REGIONS AND STATES

	Market Share 2003	Volume 2003	Market Share 2002	Volume 2002
PACIFIC	36.2%	492	29.1%	418
WEST SOUTH CENTRAL	21.0%	285	17.5%	251
SOUTH ATLANTIC	18.7%	254	*	*
MOUNTAIN	17.4%	236	26.0%	374
MIDDLE ATLANTIC	10.6%	144	10.2%	147
California	32.3%	439	27.3%	392
Texas	20.6%	280	15.7%	226
Florida	15.2%	20	*	*
New York	10.0%	136	*	*
Nevada	*	*	18.2%	262
Arizona	*	*	5.7%	82

* Not displayed due to low respondent base for this survey year.

Source: U.S. Department of Commerce, ITA, Office of Travel and Tourism Industries;
 Bureau of Economic Analysis.

CHART 4
MEXICAN AIR VISITATION ESTIMATES
 (Market Share and Volume in thousands of people)
VISITATION TO THE CITIES

	Market Share 2003	Volume 2003	Market Share 2002	Volume 2002
Los Angeles	21.6%	294	21.1%	303
Miami	11.4%	155	*	*
New York	9.8%	133	*	*
Las Vegas	*	*	17.7%	254
Phoenix	*	*	5.0%	72

* Not displayed due to low respondent base for this survey year.

Source: U.S. Department of Commerce, ITA, Office of Travel and Tourism Industries;
 Bureau of Economic Analysis.

In 2003, most of the Mexican tourists traveling by air visited the U.S. for vacation, followed by business, visiting relatives or friends and attending conventions. In 2003, business travelers and people attending conventions registered a decline in their relative participation against vacationers and tourists who visited relatives or friends. Since business travel is widely regarded as the most lucrative travel sector, this is an area where promotional activities could enhance Mexican visitation to the United States. The data below depicts the main reasons for Mexican travel and selected traveler characteristics:

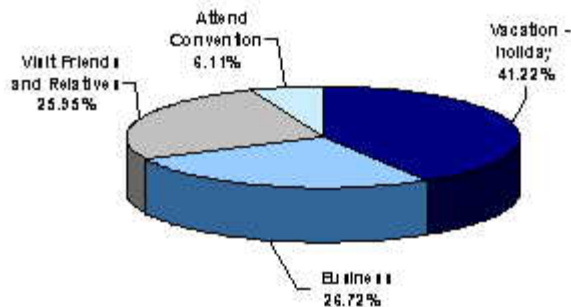
CHART 5
MEXICAN AIR VISITATION ESTIMATES
SELECTED TRAVELER CHARACTERISTICS (by Percentage Point Change)

	2003	2002	% Point Change*
Purpose of Trip: (multiple response)			
Vacation - holiday	54%	51%	3
Business	35%	35%	-1
Visit Friends and Relatives	34%	29%	5
Attend Convention	8%	14%	-6
Transportation Types Used in U.S.: (multiple response)			
Rented Automobile	34%	33%	1
Company or Private Automobile	26%	27%	-1
Airline in U.S.	15%	21%	-6
Rail between Cities	9%	8%	1
Bus between Cities	9%	7%	2

* Variance due to rounding.

Source: U.S. Department of Commerce, ITA, Office of Travel and Tourism Industries;
 Bureau of Economic Analysis.

CHART 6
MEXICAN AIR VISITATION ESTIMATES 2003
PURPOSE OF TRIP



SO URC E. U.S. Department of Commerce, ITA, Office of Travel and Tourism Industries, Bureau of Economic Analysis.

CHART 7
MEXICAN AIR VISITATION ESTIMATES
SELECTED TRAVELER CHARACTERISTICS (by Percentage Change)

	2003	2002	% Point Change or % Change*
Prepaid Package	10%	11%	-2 pts
First International Trip	7%	7%	0 pts
Average Length of Stay in U.S. (nights)	9.1	9.5	-4%
Average Number of States Visited	1.2	1.2	0%

* Variance due to rounding.

Source: U.S. Department of Commerce, ITA, Office of Travel and Tourism Industries;
 Bureau of Economic Analysis.

According to OTTI research, Mexican travel is officially forecast to increase by 3% in 2004 to 9.97 million visitors, and by 15 percent from 2003 through 2007, to almost 11.1 million visitors. This is good news for U.S. destinations and tourism services, who should consider revitalizing market strategies to tap into this increasing market.

Commercial Service (CS) Mexico City works jointly with OTTI to implement the first Travel Barometer Program Mexico. This quarterly survey collects qualitative information from the most important travel wholesalers and airlines in Mexico to generate a short-term forecast on the trends of Mexican tourism to the United States. According to the last survey, the Mexican travel demand for the summer of 2004 was projected to be higher than 2003, but the travel demand for the fourth quarter was projected to be about the same compared to 2003.

According to this survey, the top barrier for travel to the United States continues to be related to the difficulty in obtaining a visa, followed by the visa processing time and the entry procedures to visit the United States. The U.S. Commercial Service works extensively with U.S consular officials to do various outreach programs to educate the travel and tourism trade about visa procedures. On the other hand, according to the Travel Barometer Program Mexico results, amusement park and cruise travel to or from the U.S. showed the highest product awareness compared to other competitive destinations.

The main goal of the Travel Barometer Program Mexico is to reliably predict a short-term forecast on travel demand to the United States and report growth in bookings and monitor market conditions. The quarterly internet-based program also queries the travel trade's view of what is needed to expand travel to the United States. The survey can be customized and can collect destination specific results through three subscription options.

III. BEST PROSPECTS

Mexicans are drawn to the United States because of its destination diversity, infrastructure and excellent travel and tourism services. In particular, Mexicans enjoy

destinations which offer shopping, gambling, entertainment, amusement parks and a cosmopolitan environment. Natural parks and other outdoor destinations are typically not as attractive for Mexicans. Skiing is the notable exception – Mexicans flock to resorts in Colorado and New Mexico during the winter months to ski.

As was mentioned before, it is important to make a difference between land and air travelers from Mexico to the United States. Mexican land tourists usually travel to the southern states for a short time period in order to visit relatives or friends and do shopping. On the other hand, air travelers do visit family but also make pleasure trips. These tourists must be considered very important since they are the ones who generate most of the travel and tourism receipts to the United States. Air travelers usually stay longer and buy packages that include transportation, lodging, shopping, and recreational activities.

During 2003, the main destination for Mexican tourists to the United States was California and specifically Los Angeles with a 21.6% market share. Mexican travelers visit L.A. for visiting relatives, shopping, amusement parks and attractions.

Miami has become a very important destination for medium and high-income Mexican travelers. Mexican tourists are attracted to the Latin culture, shopping, weather and cosmopolitan way of life of this important Florida city. Orlando is another important destination in Florida for Mexican tourism. Orlando attracts travelers because of its variety of theme and amusement parks

New York attracts both pleasure and business travelers from Mexico. Its importance as a financial hub and its wide range of activities, attractions, culture, entertainment and international prestige has made this city one of the most important destinations for Mexicans.

Other important places for Mexican travelers include the states of Texas and Arizona. Texas attracts Mexican travelers who visit relatives and friends and also tourists who look for shopping in destinations like San Antonio, Houston, and Dallas. Additionally, Mexicans are very aware of gambling destinations such as Las Vegas.

Mexicans like to take family trips and usually travel during school holidays. Therefore, the major travel seasons for Mexicans are during summer months of July and August, Easter, and Christmas. Mexican families visit amusement parks, shopping centers and participate in entertainment activities. They also like to buy packages that include admittances and transportation to the main attractions and amusement parks they visit. Packaging family-friendly vacation deals is a strategic way to penetrate into the Mexican market.

IV. COMPETITIVE ANALYSIS

Domestic Destinations

Mexico itself is one of the most important travel and tourism destinations worldwide. Domestic and international travelers are attracted to a wide variety of activities, sites, and services that are considered among the best in the world. Mexico offers its visitors

archeological sites, colonial cities, beaches, world-class resorts and an excellent tourism infrastructure.

Changes in the visa regulations, security issues, and the devaluation of the Mexican Peso against the U.S. Dollar have caused Mexican tourists to choose domestic and even alternative international destinations instead of visiting the United States.

International Destinations

Even though the United States is Mexico's top international destination, with over 87% of the market share, there are new places attracting Mexican travelers with very complete packages and offers. Additionally, due to new visa and security restrictions, Mexicans are looking for places where they do not need a visa to go.

Canada is quite attractive for Mexican travelers because of its similarities with the United States and beneficial exchange rate. Canada offers Mexican travelers a cosmopolitan environment, shopping, entertainment activities, skiing resorts and is also visited by people taking English courses. It is very important to mention that Mexicans do not need a visa to visit Canada, a fact that Canada uses heavily in its marketing campaigns. Consequently, Canada has become very popular among Mexican tourists.

Traditionally, high-income Mexican travelers have visited Europe. However, very recently travel agents and wholesalers started to offer very attractive affordable packages for medium-income tourists. Europe attracts Mexicans because of its cultural diversity. Additionally, as was previously mentioned, due to transit visa restrictions imposed by the United States, several airlines now offer flights to Europe either directly from Mexico City or with stops in Canada. Mexicans also do not need visas for Europe.

In the last couple of years, Mexican tourists have traveled more frequently to Latin American countries. The Argentine and Brazilian crises and their respective currency devaluations have made these countries very affordable destinations for Mexican tourists. Brazil is attractive because of its tropical and festive environment. Argentina features a mix of Latin and European culture and ski resorts. Finally, Chile has become an important destination for business travelers because of the bilateral trade agreement between Mexico and Chile.

Other destinations frequented by Mexican travelers include Central American and Caribbean countries. Mexicans usually visit several Caribbean countries via cruises. High-income Mexican tourists and business people also buy packages to Asian destinations such as: Japan, China and Thailand.

Examples of Competitive Destinations

- ┌ Mexico – average price for an all-inclusive package to Cancun (8 days) is US \$650 per person.
- ┌ Canada – average price for an air and hotel package visiting Toronto, Ottawa, Quebec and Montreal (8 days) is US \$829 per person.
- ┌ Europe – Travelers can find air and hotel packages to one European city for \$999 per person (4-day package to Madrid or Paris). The average price for an air and hotel package visiting 4 European cities is US \$1,500 per person (9 days).

- ▮ South America – average price for an air and hotel package visiting Buenos Aires and Rio de Janeiro (9 days) is US \$1,400 per person.

V. MARKET ACCESS

Wholesale operators continue to be the most important distribution channel in the Mexican travel and tourism market. Wholesalers sell their packages to the travel agents who provide their services to the end consumers. Mexicans prefer to make their traveling arrangements through a travel agent, since they are not confident about providing their credit card information through the internet. Additionally, internet penetration in Mexico remains very low.

It is crucial to establish and maintain a personal relationship with the travel and tourism companies located in Mexico. U.S. travel and tourism companies must undertake frequent trips to Mexico and establish a comprehensive follow-up strategy to obtain sufficient exposure in the Mexican market and increase sales. Handing out promotional material at one trade show is not likely to generate any results if no follow-up activities are conducted.

VI. TRADE PROMOTION OPPORTUNITIES

The U.S. Commercial Service in Mexico City participates actively with the Visit USA Committee Mexico in the organization of Expo Vacaciones, the biggest travel and tourism show in Mexico that exclusively promotes U.S. travel and tourism destinations and service companies in Mexico. CS Mexico City also works jointly with the Travel Industry Association of America (TIA) and the Visit USA Committee Mexico in the organization of the “SeeAmerica Media Day” as part of Expo Vacaciones. This event gives destinations excellent exposure among the most important travel and tourism journalists and media in Mexico. Expo Vacaciones is considered the most prestigious travel show in the country.

Additionally, some of the most important wholesaler operators in Mexico attend the main travel and tourism trade shows that take place in the United States, such as Pow Wow and La Cumbre. The U.S. Commercial Service can assist U.S. companies in order to identify potential Mexican buyers during these trade shows.

VII. ASSISTANCE TO U.S. COMPANIES

Due to the importance of the Mexican market for the U.S. travel and tourism industry, CS Mexico City offers a wide range of services, programs, and events to promote U.S. travel and tourism companies in Mexico. Some of the CS Mexico services and programs offered to U.S. travel and tourism companies include counseling, assistance in trade shows, catalogue shows, trade missions/FAM trips, matchmaking services and contact lists.

PANAMA

1. SUMMARY:

As part of the U.S. Department of Commerce, the U.S. Commercial Service's ongoing efforts to advance the U.S. position in international tourism markets and generate business development opportunities for American suppliers of tourism services and products, this report, "Who's who in the travel industry in Panama", is a publication to aid U.S. tourism promotional efforts directed towards the Panamanian travel market.

This report has been compiled for the use of the U.S. travel industry in order to facilitate contact between U.S. tourism exporters and members of the Visit USA Committee which are currently known to be actively selling Visit USA travel and tourism services and products."

2. CONTENTS

VISIT USA COMMITTEE PANAMA

Visit USA Committee Panama was founded in 1999, by the Travel Industry Association (TIA) and the U.S. Commercial Service Panama. For more information contact:

VISIT USA COMMITTEE

C/O U.S. Embassy Panama
U.S. Commercial Service
Unit 0945
APO AA 34002
Phone/Fax. (507) 270-7939
Contact: Melissa de Grimaldo, Executive Director
E-mail: visitusa@pa.inter.net

AMERICAN AIRLINES

American Airlines has been serving Panama since 1990. They offer two daily flights to Miami. During Panama's high season (December - February) they operate three daily flights to Miami. They provide their Admirals Club at Tocumen International Airport. For more information contact:

Phone: (507) 269-6104
Fax: (507) 269-0830
P.O. Box 1891
Panama 1, Republic of Panama
Country Manager: Lorena Sandoval
E-mail: lorena.sandoval@aa.com

CONTINENTAL AIRLINES

Continental Airlines started operations in Panama in June 1990. They provide daily 727 flights to Newark and Houston. They also offer seasonal (December - March) 727 flights to Guayaquil and Quito. They operate a Presidents Club in the Tocumen International Airport.

Phone: (507) 263-9177
Fax: (507) 263-0353
P.O. Box 55-1092 Paitilla
Panama, Republic of Panama

Country Manager: Robert St.John
E-mail: ptycosa@c-com.net.pa

COPA AIRLINES

Copa Airlines is the sole Panamanian airline with 54 years in operations. They own eighteen 737-700 Boeing Airplanes, two 737-800s and two 737-200s. They fly to 31 destinations in 20 countries in North, South, Central America and the Caribbean. For more information contact:

Phone: (507) 207-6102
Fax: (507) 227-0717
P.O. Box 1572
Panama 1, Republic of Panama
E-mail: ventascopaairlines@copaair.com

COPA VACATIONS

Phone: (507) 225-7658
Fax: (507) 227-2774
P.O. Box 1572
Panama 1, Republic of Panama
Contact: Elias Menacho, Marketing Manager
E-mail: emenacho@copaair.com

DELTA AIR LINES

Delta Airlines began operations in Panama April of 1998. They offer a daily flight to Atlanta with one Boeing 737-800 airplane.

Phone: (507) 263-1398
Fax: (507) 263-3835
P.O. Box 0832-2645
WTC, Panama, Republic of Panama
Contact: Miguel Lopez, Country Manager
E-mail: salesdeppty@cwpanama.net

TOUR OPERATORS

MARGO TOURS

The group ranks among the largest wholesaler and tour operator in Panama. The offices were established in Panama City in 1979. They are a general sales agent representing Cruise lines such as Carnival, Cunard and Seabourne.

Phone: (507) 269-6693
Fax: (507) 264-5355
P.O. Box 832 1691
WTC, Panama, Republic of Panama
Contact: Aida Lorena Orillac, General Manager
E-mail: aoillac@margotours.com

VIAJES TIVOLI

Established in 1954 by Mr. Carlos De Janón. The business is managed by two of his daughters Olga de Jimenez and Michelle de Guizado. They have 19 years of service representing Royal Caribbean and Celebrity Cruise Lines. Additionally they represent Dollar Rent a Car, ISE Cards, World Tauck and major tour operators in the US.

Phone: (507) 223-3106

Fax: (507) 269-8656

P.O. Box 990

Panama 1, Republic of Panama

Contact: Michelle de Guizado, General Manager

E-mail: viajestivoli@cableonda.net

DISCOVER THE WORLD MARKETING

Discover the World Marketing is a global network with more than 77 offices in 52 countries with 23 years in the travel industry. In Panama they represent various airlines, Princess Cruises, which is the cruise line that offers more itineraries through the Panama Canal, Hyatt Hotels, and Vail Resorts.

Phone: (507) 263-3033

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CONTACTOS

Is a Travel Industry marketing company, which offers a wide variety of products, such as National Car Rental, Copa Vacations and upscale Cruise Lines like Silversea in Panama and The World of Residence for eight Latin American markets.

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PERU

SUMMARY

The United States is still the preferred destination of Peruvians who travel abroad. The United States enjoys 26 percent market share, followed by the Chile, Ecuador and Bolivia. Other popular destinations are Argentina, Spain, Brazil and the Caribbean countries that offer all-inclusive packages. Peruvian travelers to the United States totaled 154,324 in 2003, roughly spending \$1,400 per traveler, excluding air tickets. The United States is the most visited country because of the number of flights available, the diversity of activities, both leisure and business-oriented, and highly specialized trade

events which take place in Chicago, Dallas, Las Vegas, Miami, New York and Orlando.

The single most popular tourism destinations for Peruvians are the cities of Orlando, FL, Miami FL, New York, NY, Patterson, NJ and Los Angeles, CA. Peruvians prefer to travel from January through March, the last week of July and the first two weeks of August. These time periods coincide with the Peruvian school systems vacation schedule. Florida attracts 50 percent of the total number of Peruvians visiting the United States. More than 60 percent of Peruvians travel alone for business purposes, 16 percent travel in couples, combining business with tourism, and 24 percent corresponds to families and friends traveling for tourism purposes.

The Peruvian tourism sector represents one percent of the Peru's GDP, totaling US\$700 million. Tourist arrivals to Peru were up in 4.5 percent in 2003 as a result of the campaign "Pack Your Six Senses" carried out by the Peruvian government. The most popular destinations for foreign travelers are the cities of Lima, Cusco, Chiclayo, Ica, Trujillo and Arequipa.

It is estimated that Peruvians traveling overseas will steadily increase in the years 2004-2006 by an average rate of four percent, driven in part by the proposed Andean Foreign Trade Agreement (FTA). Market niches that could have potential for Peruvian tourists are: fly/drive, cruises and tour packages, conventions and trade shows, ski packages, shopping, amusement parks, language course, work and travel international student program.

MARKET OVERVIEW

Peru, along with New Zealand, Brunei, Chile and Singapore signed an "open skies" agreement with the United States in May 2002. This multilateral agreement means that there is no limit on the number of flights between these countries and the United States demonstrates that travel and tourism ties have a prospect for growth.

The modernization of Peru's airports began in February 2001 with the first concession for 30 years of the Lima International Airport awarded to Lima Airport Partners (LAP). LAP is a consortium formed by Alterra (57%) and Fraport Frankfurt (43%). Alterra Partners headquartered in London is a joint venture of the airport operator, Singapore Changi Airport Enterprise and the infrastructure developer, Bechtel Enterprises. Fraport AG Frankfurt Airport Services Worldwide, operates Frankfurt Airport. In addition to modernizing the airport infrastructure, LAP will implement and promote a worldclass, multi-level shopping center (Peru Plaza) an air and sea traffic hub and a duty free area to grant special custom benefits to certain commercial operations located in the airport and surroundings.

In terms of outbound travel, the United States attracts approximately 26 percent of Peruvian travelers, mainly tourists and businesspeople. According to the U.S. Department of Commerce, Peruvian travelers to the U.S. totaled 164,482 in 2002 and 154,324 visitors in 2003. Despite the events of September 11th and the rigorous process to obtain visas, Peruvians continue to travel abroad. The United States is the preferred destination and the most attractive country because of the diversity of the cities, the ease in reaching and the large number of conventions and expositions. Cultural and

sporting events in the United States make it an even more exciting vacation destination. Most Peruvian vacationers make multiple visits to the United States after discovering the variety of vacation packages the country has to offer.

The single most popular destination for Peruvians during the past five years has been the cities of Orlando, FL followed by Miami, FL, New York, NY and Los Angeles, CA. Peru is located below the equator therefore the main travel seasons for Peruvians are January through March (during the “summer vacation”), the last week of July (during the national holidays), and August (during the mid-year school vacation).

The best way to enter into the Peruvian market is through a local wholesaler operator or directly with a travel agency. There are approximately 40 wholesalers and 2,500 travel agencies nationwide but only 12 percent are IATA members. The market is highly concentrated with 60 percent operating in Lima totaling 1,500 travel agencies.

MARKET TRENDS

The most current U.S. Department of Commerce tourism industry data showed an average decrease of 16 percent in South American travelers to the U.S. in 2003 if compared to 2002; however in the case of Peru, this decrease was only of six percent.

Number of Peruvians Traveling Overseas

	2002	2003	2004 (est.)	2005 % exchange
Total Number 1/	958,689	942,390	980,085	4%
Travelers to U.S.				
1/	273,518	248,931	258,888	
2/	164,482	154,324	161,000	4%

Source:

1/ Direccion General de Migraciones y Naturalizacion, Ministry of the Interior, Peru

2/ U.S. Department of Commerce

Note: It is important to mention that the gap between figures obtained from the U.S. Department of Commerce and the Peruvian sources on the number of Peruvian travelers to the U.S. is due to the fact that there is a large number of Peruvians having double citizenships. These individuals usually leave Peru with the Peruvian passport and enter the United States with the passport other than the Peruvian passport. Additionally, Peruvians traveling to work in Japan or European countries usually make one stop in the United States.

Security issues generated by the September 11th terrorist attacks and the percentage of denials of U.S. visas in Peru caused a slight decrease in the number of outbound travelers during the 2002-2003 period. However, it is estimated that Peruvians traveling overseas will steadily increase in the coming years at an average rate of four percent as a result of the aggressive and affordable marketing campaigns carried out by the local operators.

Holding more than 45 percent of the market, Nuevo Mundo is the largest wholesaler and travel agency operation in Peru. Nuevo Mundo offers the most diverse and widest variety of services to travelers including hotel space, rent-a-car services, theme parks, etc. During the last eight years, Nuevo Mundo acquired three Peruvian wholesalers (Camino Real, Destinos Mundiales and Consorcio Representaciones) and several travel agencies among which are SwissTravel, Orrantia, Creditour, Exintour and Uniglobe. In addition to Nuevo Mundo, there are two other consolidators, Costamar and Mikonos who handle a large share of the airline ticket market. Nuevo Mundo, as well as these consolidators, mostly offer the tickets to non-IATA travel agencies.

The low commissions paid by airline companies brought about consolidation in the Peruvian travel industry. Two companies comprise 15 operation travel agencies. The first one, AVE PERU, groups six travel agencies and as of May 2004 nine travel agencies formed AVANTIX. This strategy is similar to one established in Venezuela, Chile and Ecuador. It will give these two groups an opportunity to negotiate commissions thereby obtaining better benefits for the travel agencies as a whole.

IMPORT MARKET

Sample market niches that could have potential for Peruvian tourists include:

Fly/Drive

Fly/Drive packages offer the vacationer a chance to combine different types of vacations. For example, travelers can rent a car in Miami, drive to Orlando, visit Disney World and other theme parks, and then come back to Miami for shopping, all in a 7-day trip.

Cruises and tour packages

Peruvian travelers visiting Florida will typically consider a cruise vacation, especially when special and inexpensive packages are offered. Peruvians are interested in both local and foreign destinations.

Conventions and Trade Shows

Peruvians are becoming more and more interested in gaining market exposure, knowledge, or learning about new technologies. Local companies are in the process of incorporating all the necessary tools to become more competitive in a global economy. Peruvian businesspeople and professionals enjoy participating in trade shows and specialized conventions.

Ski Packages

Upper income Peruvian travelers consider visiting U.S. ski resorts (mostly in Colorado) when planning their vacations. Attractive airfares and hotel rates, reliability of snow cover and low lift ticket fees (or lift fees included in a package deal) are considered when Peruvians formulate their travel plans.

Shopping

Peruvian visitors to the U.S. list shopping as a top priority. Many consumer items are cheaper in the U.S. than in Peru. Shopping is successfully marketed as part of weekend

trips or longer holidays in combination with other elements of packaged travel such as theme parks or city sightseeing. Peruvians like to purchase designer apparel that is usually expensive locally and other quality products that are not easily available.

Amusement Parks

The average Peruvian traveler considers amusement parks a must during his/her trip to the United States. Most Peruvian tourists traveling with their families to the United States for the first time will visit Disney World, Epcot Center, MGM Studios, and/or Universal Studios, among others.

Language Courses

As Peruvians become more exposed to the global economy, there is an increasing demand to learn English as a second language, especially to obtain a job. Younger business people, students, and teachers want to learn, improve, or specialize in the English language. These people would spend one to four weeks in an intensive course either at a college, an English language institute or a university.

Work and Travel International Student Program

Available to Peruvian students from private universities, this program recruits second language English speakers to travel and work in the U.S. as part-time or full time for approximately a three-month period to gain experience and improve English language proficiency.

COMPETITION

The most popular destinations for Peruvians, according to 2003 figures, are the United States, with more than 26 percent of the market share and border countries (Chile, Ecuador and Bolivia) having approximately 47 percent market share. In terms of Latin America, Bolivia accounts for 21 percent, followed by Chile with 19 percent. Some other popular destinations are Argentina, Spain, Brazil and the Caribbean countries. The Caribbean is very popular among Peruvian travelers seeking the sun for their holiday vacations. Peruvians are especially attracted by all-inclusive packages. Popular destinations include Punta Cana in the Dominican Republic, Varadero in Cuba and Cancun in Mexico. Isla Margarita in Venezuela, Buzios in Brazil, Cartagena and Santa Marta in Colombia are also popular.

It is important to mention that during the last 2-3 years, Argentina has become a very popular destination for Peruvian travelers. Approximately 50,000 Peruvians traveled to Argentina in 2003. The devaluation of Argentina's currency as a result of the economic recession makes it very attractive for Peruvian tourists with tour packages that include 4 to 7 days lodging including breakfast, airfares and tours at a very low price (\$350-\$700 per person).

Preferred Countries by Peruvians - 2003

Country	Total	Tourism	Business/ Work	Edu/Conf	Others
U.S.	248,931	243,593	664	96	4,578

Bolivia	198,044	194,547	205	3	3,289
Chile	179,399	153,853	3,099	10	22,437
Ecuador	63,735	63,474	108	2	151
Argentina	49,045	48,618	114	3	310
Spain	40,123	38,609	544	18	952
Mexico	17,462	17,153	102	7	200
Italy	13,217	12,384	77	6	750
Other South American Countries	60,345	59,324	358	11	652
Central America	36,374	35,881	209	16	268
Asia	9,114	8,535	90	7	482
Other European Countries	22,886	21,959	20	14	893
Others	3,715	3,376	66	3	270
Total	942,390	901,306	5,656	196	35,232

Source: Direccion General de Migraciones y Naturalizacion, Ministry of the Interior, Peru
 Despite the statistical information shows a large number of Peruvians traveling for tourism purposes, it should be noted that most of the Peruvians traveling abroad do not indicate the purpose of their trip when filling out the Peruvian immigration form.

Domestic Tourism

The two government agencies promoting Peru as an international destination are the Ministry of Foreign Trade and Tourism (MINCETUR) and Promperu, the Peruvian tourism promotion agency. Peru has some of the world's most diverse tropical forests and renowned cultural sites. The tourism sector is a potentially important source of both foreign exchange and employment representing one percent of the GDP, totaling US\$700 million.

The government of Peru has announced its intention to make the development of the tourism sector a high priority through the "Pack Your Six Senses" advertising campaign focusing the archeological and historical sites, nature and biodiversity, living cultures and adventure sports. Tourist arrivals were up in 4.5 percent in 2003 compared to 2002 figures as a result of a campaign to promote tourism to Peru.

Arrivals of Tourists by Country of Origin – Peru

Country	Total	2002	2003
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U.S.	390,273	194,153	196,120
Chile	302,982	142,401	160,581
Bolivia	118,605	57,760	60,845
Ecuador	110,586	57,089	53,497
U.K.	91,633	44,042	47,591
France	82,205	40,083	42,122
Argentina	77,607	36,448	41,159
Germany	71,461	35,064	36,397
Spain	69,167	35,032	34,135
Asian countries	95,364	46,495	48,869
Other countries	499,682	245,060	254,622
Total	1,909,565	933,627	975,938

Source: Direccion General de Migraciones y Naturalizacion, Ministry of the Interior, Peru

It is estimated that 1.5 to 2.5 million people travel within Peru annually. Demand for domestic tourism by Peruvians tends to peak during Easter (“Semana Santa”) and the last week of July (national holiday) through the first and second week of August (mid year school vacation). Long weekends and school term breaks in May and October are also opportunities for Peruvians to travel domestically.

Peru remains a top vacation site for Peruvians. According to Promperu, the Peruvian tourism promotion agency, 68 percent of domestic travelers live in Lima. Approximately 57 percent travel for leisure and vacation, while 34 percent travel to visit friends and relatives. The remaining 5 percent travel for business purposes.

In addition to its diversified natural beauty divided in three regions (coast, mountains and jungle), Peru offers a multi faceted history illustrated by its imperial cities, its authentic culture and gastronomy, and the warm hospitality of its people.

The most popular destinations among Peruvians are Lima, Ica, Trujillo, Chiclayo and Arequipa. Machu Picchu (Cusco), Colca Canyon (Arequipa), Lake Titicaca (Puno), the northern beaches (Trujillo and Chiclayo), Paracas Reserve (Ica) and the natural reserve park of Manu in the jungle are also considered top attractions.

SALES PROSPECTS

According to top managers in the tourism sector, Florida receives 50 percent of the total number of Peruvians visiting the United States, leading the list of preferred U.S. state destinations. New York and New Jersey rank second at 20 percent, followed by California with 20 percent and the remaining 10 percent of travelers visit other states.

The city of Orlando, Florida is the top destination for Peruvian tourists, attracting 45 percent of Peruvian travelers. However, in terms of the overall U.S. market, Orlando decreased its market share during the last three months of 2001 and 2002 as a consequence of the events of September 11th.

Miami, FL, New York, NY, Patterson, NJ and Los Angeles, CA complete the list of top city destinations. A large number of Peruvians live in these cities and are frequently visited by their Peruvian relatives. Other cities like Chicago, Las Vegas, Washington D.C. and Boston are also popular, but to a lesser extent.

END-USER ANALYSIS

There are no official figures available. Anecdotal evidence revealed that 60 percent of Peruvians travel alone for business purposes, 16 percent travel in couples combining business with tourism, 12 percent travel with their immediate family, and 12 percent with friends and relatives. Of the Peruvian traveler population, about 83 percent travel abroad once a year, while 11 percent are frequent travelers. In general, the Peruvian traveler is well acquainted with the United States, through previous visits and U.S. television programs, which are widely shown in Peru through broadcast television channels and cable TV. Peruvian residents seek the sun and have turned Florida into a prime vacation destination market. Shopping and amusement parks such as Disney World and Disneyland are among their favorite attractions. Business-oriented groups visit Chicago, Las Vegas, Miami, Dallas and New York for conventions and trade shows.

The Vacation and Tourism Traveler

The average Peruvian vacation traveler spends 7 to 10 nights in the United States and has been to the U.S. before. Price is the primary decision-making factor among these travelers. They are constantly seeking discounts and special offers among travel agencies. The chances of this traveler using rent-a-car services are high. Peruvian vacationers enjoy traveling by car within a city or between cities. Peruvian vacationers will be interested in shopping, amusement parks, and pleasure resorts. The daily average expenditure is approximately \$150-\$200, excluding the air ticket. Peruvian residents seek the sun and have turned Florida (Miami and Orlando) into a prime vacation destination market. Shopping and amusement parks such as Disney World and Disneyland are among their favorite attractions.

The Business Traveler

The typical Peruvian business traveler is male, spending an average of 3 to 5 nights in the United States, with a US\$200-\$300 average daily expenditure. This traveler is likely to be a manager of a local or multinational corporation, a mid-level employee or is an independent businessperson. Usually, travel agencies handle these trips as corporate accounts providing airline reservations and hotel bookings to the business traveler. Business-oriented groups visit Chicago, Las Vegas, Miami, Dallas and New York for conventions and trade shows.

Traveler Visiting Friends and Relatives

These are usually frequent visitors spending an average of 14 nights in the U.S. This group of people has the highest number of self-bookings obtaining their travel information from family and friends in the U.S. The main destinations are Patterson, New Jersey and Miami, Florida where the largest Peruvian communities are located.

Peruvian vacations are mostly planned at the last minute; only a small percentage is planned in advance. Demand for vacation travel tends to peak from January through March (local summer vacations) and from the last week of July through the first two

weeks of August. There is also a one-week school term break in May and October.

MARKET ACCESS

Key Players

Travel agents and wholesale operators are the key players in the Peruvian travel industry. They are very influential in the consumer's decision-making process. Peruvians tend to buy package tours put together by wholesale operators. They also attract clients using massive campaigns through internet mailings and advertising in web sites. Travel agents use the catalogs and brochures provided by the wholesale operators to help the client in choosing the place to go and work on the details of the vacation. Travel agents deal with the final client, while wholesale operators deal with hotels, car rentals, attractions and other providers to offer an integrated package. In this sense, the focus of any effort to establish a U.S. destination, attracting, or travel product in the Peruvian market must be product placement, with wholesale operator and travel agent awareness and training.

Peru has approximately 2,500 travel agencies and 40 wholesale operators. The Asociacion Peruana de Agentes de Viajes y Turismo (APAVIT) is the key accredited travel agent association in Peru, with 57 members in Lima and 236 throughout the rest of the country.

Advertising

Broadcast advertising is expensive in Peru, and it is best left to big budget advertisers. Print advertising is particularly effective, for both consumers and traders. Sponsoring a "win a trip" contest in cooperation with an airline, a newspaper, magazine, or radio station is an excellent promotional tool in the Peruvian market. Another key player is through the Visit USA Committee Peru. The Committee promotes the U.S. as a destination through different professional magazines, electronic bulletins and newspapers.

Familiarization Trips

Familiarization trips (FAM trips) are an important part of an overall marketing strategy. A FAM trip is an excellent tool for introducing and supporting a tourism product or destination among travel agents. Wholesalers, airline companies and hotel representatives schedule a 3-5 days FAM trip for groups of 10-12 travel agents to visit a destination or to learn about a new product or service. These trips are a valuable marketing plan for introducing and supporting a destination or tourism product among travel agents.

E-Commerce

The number of Internet users shopping online for travel and tourism services has increased enormously in the past years. The global, information-rich attributes of travel products are well suited for the Internet. In many cases, consumers are turning to the web to research their vacation prior to booking, thus eliminating an initial contact with travel agencies. The most sought after information is airfares. It is expected that other traditional sectors of the travel industry such as car rentals, hotels, and cruises, will experience tremendous growth on the Internet over the next few years.

Flights to the U.S.

Airline Company	Frequency	Destination	Number of Flights Per Week
Continental Airlines	One (1) daily flight	Newark	7
	One (1) daily flight	Houston	7
American Airlines	Two (2) daily flights	Miami	14
	One (1) daily flight	Dallas	7
Lan Chile	One (1) daily flight	Los Angeles	7
	Five (5) times a week	New York	5
Lan Peru	One (1) daily flight	Miami	7
Delta Airlines	One (1) daily flight	Atlanta	7
		TOTAL	61

Other airline companies provide one-stop connecting flights totaling around 68 flights per week. There are 30 weekly flights to Miami (Aeromejico, Taca, Avianca and Copa), 17 weekly flights to Los Angeles (Aeromejico, Taca, Copa and Avianca), 4 flights to Orlando (Copa), 10 flights to New York (Aeromejico and Taca), and 7 to San Juan (Copa). Other destination cities are available through combinations with domestic U.S. flights. Effective June 2004, AeroContinente no longer service the U.S. market.

U.S. citizens are also not allowed to use AeroContinente or Nuevo Continente within Peru. For further information refer to the following website:
www.treas.gov/offices/enforcement/ofac/ .

Tax

Airline tickets are subject to an 19 percent sales tax. Additionally, the Peruvian Government promulgated Law No. 27889 on December 17, 2002 providing a US\$15 tax for the international tickets issued in Peru. This law was effective February 19, 2003. Passengers, both Peruvians and foreigners are also subject to an airport tax of US\$28.24 in Lima and \$3.50 in the regional airports.

URUGUAY

- √ Uruguayan travelers are combining business and leisure travel to the United States.
- √ Daily flights with American Airlines and United Airlines are available with a stopover in Buenos Aires, Argentina. Some of the carriers available on a daily basis are Aerolineas Argentina, Lan Chile and Varig.
- √ All Uruguayan travelers require a visa. Less than 5% of the requests are denied and travelers may obtain their visas within 48 hours of application. However, the \$100 cost of the visa is regarded as exceedingly expensive.
- √ Major cities visited are: Miami, New York, Orlando, Boston, Washington, D.C., Los Angeles and San Francisco. There has been a noticeable increase in Uruguayan participants at trade fairs and exhibits, so if time allows attendees will also visit cities nearby the events.

- √ The average length of stay during leisure travel is 12 nights and the average number of states visited is two.
- √ Travelers prefer to book their trip with a travel agent. (Uruguayans usually do not make reservations on-line).
- √ Preferred travel packages include air, lodging and car rental.
- √ Purpose of travel: business, shopping, amusement/theme parks and sightseeing.
- √ Total trip expenditures have declined due to the financial crisis during 2002-2003. Travelers focus on price of airfare and lodging and tend to reduce eating and shopping expenses.
- √ During the late 90's and up to 2001, Uruguayan traveling statistics to the United States showed a steady increase, going from 46,000 travelers to reaching almost 70,00 in a five-year period.
- √ Current market conditions demonstrate positive travel projections for 2004-2006.
- √ U.S. travel operators are encouraged to strengthen contacts with Uruguayan wholesalers and travel agents.

VENEZUELA

The United States continues to be the most popular vacation destination for Venezuelans, despite of the implementation of a Foreign Exchange Control in February 2003, which restricted Venezuelan's access to foreign currency. For the U.S. Travel and Tourism market, Venezuela is the 12th largest overseas market and the second from Latin America in terms of international visitors.

The Travel & Tourism market is expected to recover by 4% in 2004 vs 2003. This estimated recovery is related to the decision of the Foreign Exchange Commission's offering of a special allowance at a preferential exchange rate for Travel & Tourism. This program is being expanded in June 2004.

The U.S. Airlines are receiving foreign currency at preferential rate. This has stabilized the market since last year, while offering uninterrupted service in the Travel & Tourism market.

Venezuela has abundant flights to/from the U.S. American Airlines, Continental Airlines and Delta Airlines are currently servicing the cities of Atlanta, Dallas, Fort Lauderdale, Houston, Miami and New York.

The commercial opportunities in the U.S. include the following sub-sectors:

Summer Camps with English Language Courses

Theme Parks
Winter Sports
Travel and Adventure.

Spotlight Latin America Show Schedule Partial Listing

The USA Today 2004
October 19, 2004
Marriott/Plaza Hotel,
Buenos Aires, Argentina

The local representatives of American companies exhibit their travel and tourism opportunities to the Argentine market for the next winter season. Convention & Visitors Bureaus, hotels, attractions, car rental companies, local tour operators that promote the US as a tourism destination participate.

For participation and registration please contact the Visit USA Committee – Argentina at info@visitusa.com.ar.

Feria Internacional de Turismo 2004 (FIT 2004)
November 27–30, 2004
La Rural Convention Center
Buenos Aires, Argentina.

Feria Internacional de Turismo coordinated by the Argentine Association of Travel & Tourism is an excellent venue for American companies to exhibit their travel and tourism opportunities to the Latin American market. Close to 40,000 individuals, the first two days, and nearly 20,000 retail travel agents, the second two days, attended the event, including buyers from neighboring countries such as Chile and Uruguay. The Commercial Service, Buenos Aires sponsors the U.S. Pavilion that includes American companies promoting their services. For more information, please contact Diana Brandon at Diana.Brandon@mail.doc.gov.

Expo Vacaciones USA 2005
February 15–17, 2005
World Trade Center
Mexico City, Mexico

Organized by the Visit USA Committee in Mexico, Expo Vacaciones is the largest and most important tourism trade show in Mexico. Exhibitors include U.S. destinations, hotels, airlines, and tourism service companies and their local representatives. Expo Vacaciones provides free one-on-one appointments with the leading Mexican wholesalers and tour operators and an optional SeeAmerica Media Day cosponsored by the Travel Industry Association of America. For more information, please contact Juan Carlos Ruiz at juancarlos.ruiz@mail.doc.gov.

Vacaciones USA 2005
February 28–March 2, 2005
Bogota, Colombia

This event takes place within the largest and most important tourism trade show in Colombia – ANATO (Colombian Association of Travel Agencies). For more information, please contact Rebecca Rueda at Rebecca.rueda@mail.doc.gov.

Destino USA 2005

April 7, 2005

Marriott Plaza Hotel

Buenos Aires, Argentina

Destino USA is a local tourism event promoting the United States as a tourism destination and is coordinated by the Visit USA Committee–Argentina. Destino USA is an excellent venue for U.S. companies and local representatives of American companies to exhibit their travel and tourism opportunities to the Argentine market. Convention & Visitors Bureaus, hotels, attractions, car rental companies and, local tour operators who promote the US as a tourism destination exhibit at the show. Destino USA is also open to all tourism retailers in Argentina and Uruguay.

For participation and registration please contact the Visit USA Committee – Argentina at info@visitusa.com.ar

Lima and Sur Peru Visit USA Workshop 2005

Lima – Wednesday, April 20, 2005

Arequipa – Thursday, April 21, 2005

Co-sponsored by the U.S. Commercial Service, the Lima event will take place at the J.W. Marriott Hotel on April 20 (all day), followed by the Sur Peru workshop in the city of Arequipa, the second largest city of Peru at Libertador Hotel on April 21 (half-day event.) The Lima Visit USA tradeshow is the largest show promoting the U.S. in Peru. More than 1,200 travel agents visited the event in 2004. For more information, please contact Flora Muroi at flora.muroi@mail.doc.gov.

Vacaciones CTN 2005

May 2005

Santo Domingo, Dominican Republic

Vacaciones CTN 2005 organized by the Caribbean Traveling Network is the largest tourism trade show featuring foreign destinations & tourism products & services in the Dominican Republic. It is an excellent venue for U.S. companies to exhibit their travel and tourism opportunities to the Dominican market. The three-day fair attracted close to 110,000 visitors in its June 2004 version and it exhibited both Dominican and international high level offers of hotels and resorts, airline tickets, cruises, car rentals, and travel agents. For more information, please contact Maria.ElenaPortorreal@mail.doc.gov.

Expo Visit USA 2005

Quito – May 18, 2005

For more information, please contact Nadya Ordonez at nadya.ordonez@mail.doc.gov.

Nor Peru Visit USA Workshop 2005

Chiclayo – June 10, 2005

For more information, please contact Flora Muroi at flora.muroi@mail.doc.gov.

The USA Today 2005

October/November 2005 (TBC)

Marriott/Plaza Hotel,
Buenos Aires, Argentina

For more information, please contact Diana Brandon at Diana.Brandon@mail.doc.gov.

Feria Internacional de Turismo 2005

November, 2005 (TBC)

La Rural Convention Center
Buenos Aires, Argentina

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**Spotlight Latin America: Travel and Tourism
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&
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