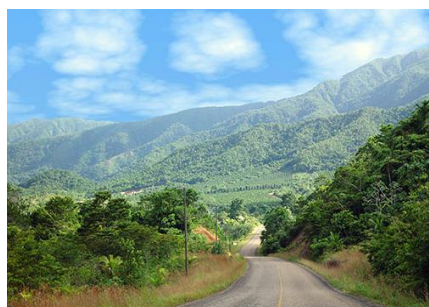
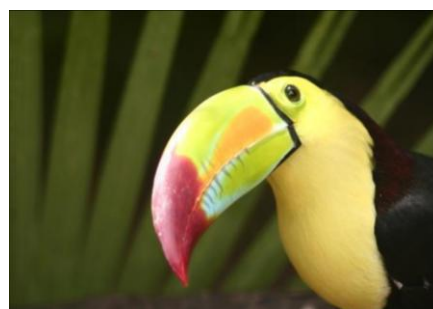


NATIONAL SUSTAINABLE TOURISM MASTERPLAN FOR BELIZE 2030

Executive Summary



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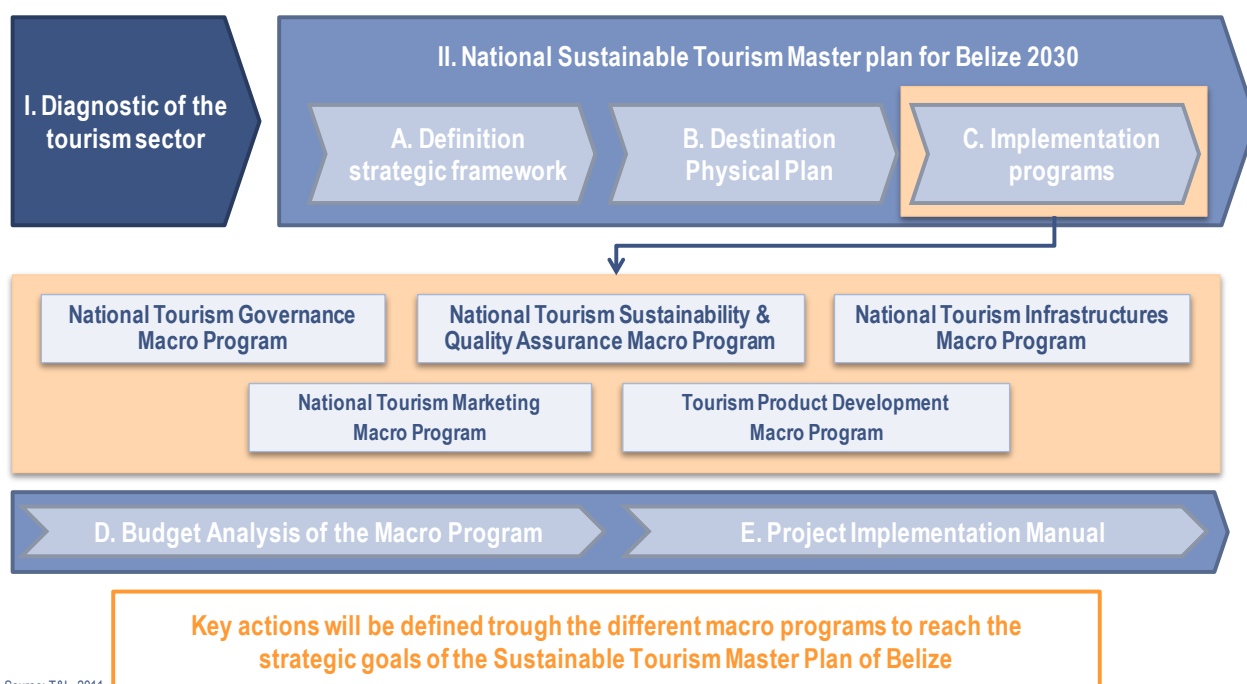
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1 Introduction

The present document highlights the strategic approach and subsequent action plan set forth in the National Sustainable Tourism Master Plan of Belize 2030 (NSTMP) whose expected implementation results will lead Belize into the future equipped with a dynamic, competitive, and sustainable tourism industry.

This executive summary explains what Belize tourism industry is like today, the objective Belize tourism situation for 2030 and the strategies and actions to reach that goal. It also gives a synthesis of the NSTMP structures and programs, and the strategic approaches that must guide the implementation plan. Finally, it provides a phasing approach and estimated preliminary budget calculation for the implementation of all programs and projects. In this regard, it is important to mention that the budget includes all activities, but this does not mean that all funding has to come from Government or even from the Ministry of Tourism and Civil Aviation/BTB. It provides a framework of magnitudes in order to organize activities for the active attraction of funding from all possible options, based on the particularities of each project.

The following graph portrays the components that comprises the NSTMP package and are subsequently described in the current executive summary:



Source: T&L, 2011

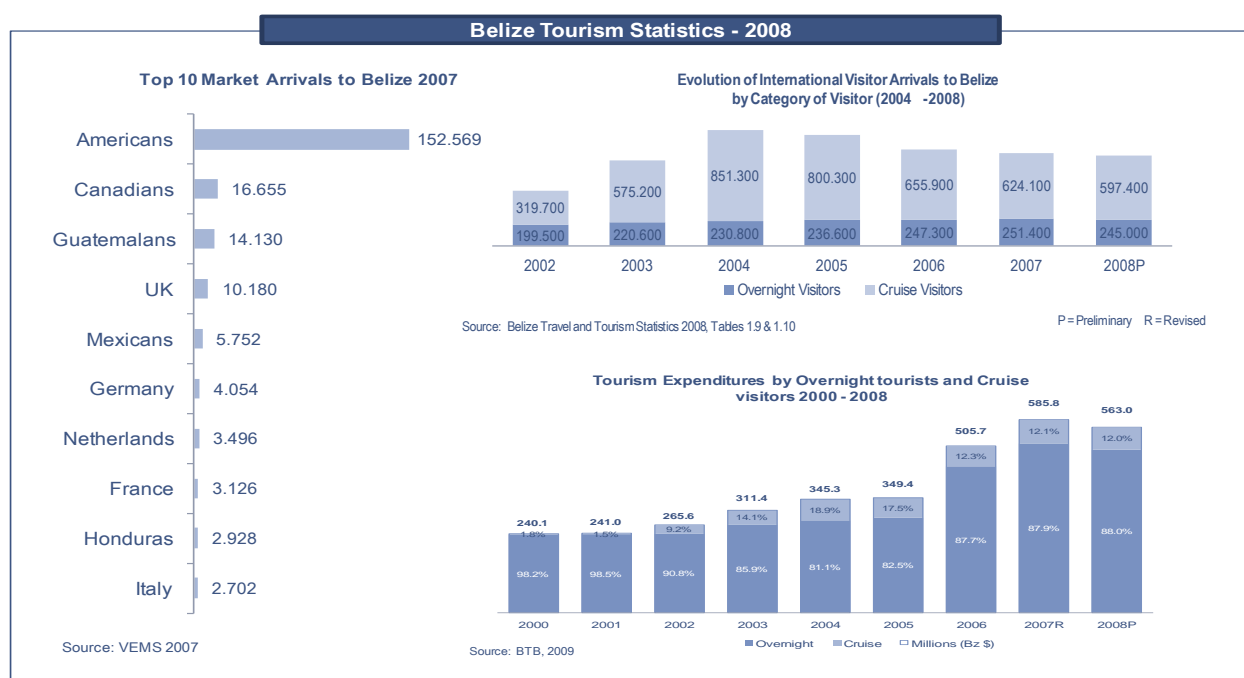
2 Belize Tourism Industry as it is today

With the momentum provided by the development of the National Sustainable Tourism Master Plan, the next two decades offer a unique opportunity for Belize to build upon its strengths and take advantage of the strategic opportunities presented. Its tourism attractiveness excels thanks to biodiversity, ecotourism and cultural sites, with specific sites of international interest having great potential for tourism development.

Belize tourism in figures

The tourism industry is developing, with a wide range of tourism operators and employment of significant numbers of Belize's population. Moreover, the tourism sector in Belize is one of the most important for the country's economy. Few reliable estimates exist and they vary according to the source, however most converge in that tourism contributes anywhere from 18% to 25% of the total GDP, and accounts for about 28%¹ of total employment.

In 2008, Belize received 245,000 overnight arrivals and 597,000 cruise visitor arrivals contributing Bz\$563 million to the Belizean economy. About 85% of overnight arrivals consume tourism facilities, the other 15% stay with friends & family and own condos. The main market source continues to be the US market in a dominant position followed by the Canadian market, as shown in the graphic below:



Belize tourism in value

Belize as a tourism destination is characterized by having excellent natural resources and strong cultural heritage that make it possible for eco-tourism, adventure and cultural tourism to flourish as its main tourism motivations, a fact that has enriched its attractiveness and motivated an increasing number of tourists.

Belize hosts four “unique tourism assets” with international recognition attracting tourists by themselves. These assets are the *Barrier Reef Reserve System*, the *Blue Hole Marine Reserve*

¹ World Travel & Tourism Economic Research – 2010 Travel & Tourism Economic Research for Belize

being unique of its characteristics in the world, the *Caracol Mayan site* with a highest level of competition but with special tourism interest and known as the most important of all Belizean Mayan sites and the *Chiquibul Caves System* hosting a great network of caves in the Chiquibul national park located in Cayo.

The rich historic background of the country is reflected in numerous heritage sites, mostly of Mayan origin, with great value for tourism. Additionally, many Mayan sites remain unexcavated and covered and are difficult to access by road resulting in an opportunity to further develop. Furthermore, the living cultures of Belize, hosting a diverse mixture of ethnic backgrounds (ie Kriol, Garifuna, Mestizo, Maya, and Mennonite) provide a unique opportunity to experience.

Additionally, its unique location offering Central American as well as the Caribbean Sea rich biodiversity is also a valuable advantage for tourism positioning. Moreover, its geography and size allows for easy access and tourism movement. And last but not least, its underdeveloped condition offers a great opportunity to foster tourism growth guided by sustainable development criteria.

However, there are numerous challenges to overcome and threats to mitigate. Belize faces many weaknesses, particularly in basic service provisions and infrastructures, technical skills of human resources pool, quality of tourism facilities, destination brand positioning, diversification of product offering and other socio-economic constraints. Additionally, misuse and unsustainable exploitation of natural and cultural resources poses a threat to the sustainable development of tourism growth.

The following summarizes main constraints identified during the diagnostic phase and highlights their negative impacts.

- ▶ **Poor level of accessibility on land**, mainly due to a small amount of paved roads leading to the tourism assets. Results in uneven distribution of tourism flow in the country, overcrowding in some sites and under utilization of others.
- ▶ **Poor level of accessibility by air**, mainly due to few international flight connections, mainly to Europe and Latin America.
- ▶ **Lack of sufficient and qualitative tourism services and facilities**, mainly due to poor training methods, low investment level of local private sector and few international hotel brands. Resulting in low visitor satisfaction and low competitiveness.
- ▶ **Scarce Belizean made handicrafts** and commercialization of traditional products and leisure activities.
- ▶ **Inadequate (natural & heritage) asset management**, mainly due to lack of awareness, knowledge and financial issues ultimately leading to degradation of the destination
- ▶ **Deficient of communication and promotion of tourism assets**, results in lack of international awareness of Belize as a tourism destination.
- ▶ **Insufficient waste disposal and sewage systems**, resulting in unhealthy conditions and visual pollution.
- ▶ **Lack of urban land planning and land use regulation**, resulting in haphazard and inadequate urban development, beach erosion, and land use conflict.
- ▶ **Lack of public awareness programmes**, leading to inappropriate usage of natural resources, such as the reef, national parks and rainforests
- ▶ **Need of integration of local communities into the Tourism Value Chain**, due to low awareness of tourism benefits and link to markets.

3 Belize Tourism looking ahead to 2030

The National Sustainable Tourism Master Plan aims to achieve a set of quantitative and qualitative specific objectives by 2030. The quantitative objectives are defined indicators of tourism intensity described in the vision 2030 in figures below. The qualitative objectives are defined as a desired market positioning or tourism vision, strategic market composition and destination development concepts.

These objectives have been based upon an in-depth analysis of the sector giving high priority to industry stakeholder consultation and tourism competitive potential of the country. They are considered achievable through the realization of the sustainable development strategic approaches and successful implementation of the framework designed by the NSTMP

Vision 2030 in figures

By 2030, the enhanced overnight destinations would result in doubling overnight tourism arrivals, reaching approximately 556,000 arrivals a year with an average length of stay of 10.6 days and spending US\$213 a day generating approximately 6 million overnight stays in tourism facilities. The optimized economic impact of the overnight tourism sector to the Belizean economy would increase 7.6 times and reach approximately US\$1.2 billion a year.

A controlled cruise tourism development is expected to level at an average compound growth rate of 3.8% in the same 20 year horizon and reaching 1.5 million cruise passengers visits per season. Per visit expenditure is expected to increase to about US\$90 per visit resulting in an optimized economic contribution to the Belizean economy of US\$134 million per cruise season.

Overnight Tourism	2008	2030	CAGR ²	Multiplier Ratio
Arrivals (overnight tourists)	245,000	556,000	3.8%	2.3
Total Overnights	2.05 million	5.89 million	4.92%	2.8
ALOS	8.36	10.6		1.3
Average spending	US\$133/day	US\$213/day		1.6
Tourism Expenditure	US\$ 248 million	US\$1,255 million	7.65%	5.1

Cruise Tourism	2008	2030	CAGR	Multiplier Ratio
Cruise visitors	597,000 705,000 (2009)	1.5 million	3.68% from 2009	2.1 from 2009
Average spending	US\$57/visit	US\$90/visit		1.6
Tourism Expenditure	US\$ 34 million	US\$ 134 million	5.89%	4

² Compound annual growth rate

Vision 2030 in concept

Belize, by 2030, will be an internationally recognized destination due to its unique, safe and high-added-value vacation experience that leaves those who visit with a longing to return and rediscover. The international market will come to know Belize's unique value proposition and will recognize its strategic location offering the best of Central American adventure and Caribbean flare. The following vision statement should become consolidated as a visual image of Belize in the international tourism market:



Source: T&L, 2011

Vision 2030 in markets

Market growth will have been driven by the high value European source market discovering Belize, higher penetration of current source markets (USA and Canada), consolidated share of niche market segments and more dynamic cross-border movement. On the other hand, domestic travels should be promoted in order to make Belizeans feel that Belize is for the Belizeans too.

- ▶ **Few but strong source markets:** The European main source markets (such as German, French and English) will have been tapped and a growing stream of high value European tourist will be visiting Belize. Belizean traditional markets (USA and Canada) will be enhanced and consolidated in mid-high end segments. The main source markets for Belize are expected to be few but to generate high value.
- ▶ **Specialized in niche market segments:** Additional market growth will come from consolidated highly specialized market drivers such as cavers, divers, pocket cruisers, honeymooners, yachties & sailors, adventure seekers, among others. These segments will be attracting a more diversified target source market.
- ▶ **Dynamic cross-border movement:** Increasingly, intraregional travellers will be crossing border points to reach Belize as more and better connectivity is reached, with cross-product synergies to neighboring countries through such products as the Mayan Heritage Trail, nautical routes as well as a highly attractive shopping and entertainment offering. Intraregional travelers will be from both the international and regional markets.
- ▶ **Domestic travels:** domestic travels will increase, making the Belizean residents feel and experience the country as it is one of the tourism World Class destinations of their own.

Vision 2030 in destinations

The implementation of the vision will lead to concentrating on mid/ high tourism facilities and segments, as well as on mid/ low density infrastructure developments. When it comes down to the most visited or tourism developed areas the development strategies would be as follows:

BELIZE CITY: Urban renovation

SAN IGNACIO: Promote tourism growth

PLACENCIA PENINSULA: Contain development and consolidate

STANN CREEK: New development

AMBERGRIS CAYE: Contain development and consolidate

NORTHERN BELIZE: Promote tourism growth

SOUTHERN BELIZE: Promote tourism growth

BELIZE REEF: Contain development and consolidate

The reference densities vary, ranging generally from level 1 (low) up to level 3 (mid). Level 0 (none) is also part of the proposed reference density of this plan, including all the areas where there is not any proposed intervention or growth. Level 4 (high) has been discarded as being rare in the country and considered inappropriate for the quality standards and the long term benefits for Belize. Predominant densities countrywide are 1 and 2, as these compose most of the humanized landscape in the country. As for level 3, it is only applied to very specific dense areas.

The hotel sector is expected to build 6,868 new hotel rooms by 2030 totaling 13,754 hotel rooms in order support the expected tourism overnight growth. From 2011 to 2020 37% of the new rooms would be built and 63.4% would be built between 2020 and 2030.

In general terms the plan tries to obtain a better balance developing all the tourism destinations according to the potentials of the different product offering. Belize will have seven thriving unique tourism destinations that together converge in a cohesive offering to make Belize a distinctive and highly competitive destination:

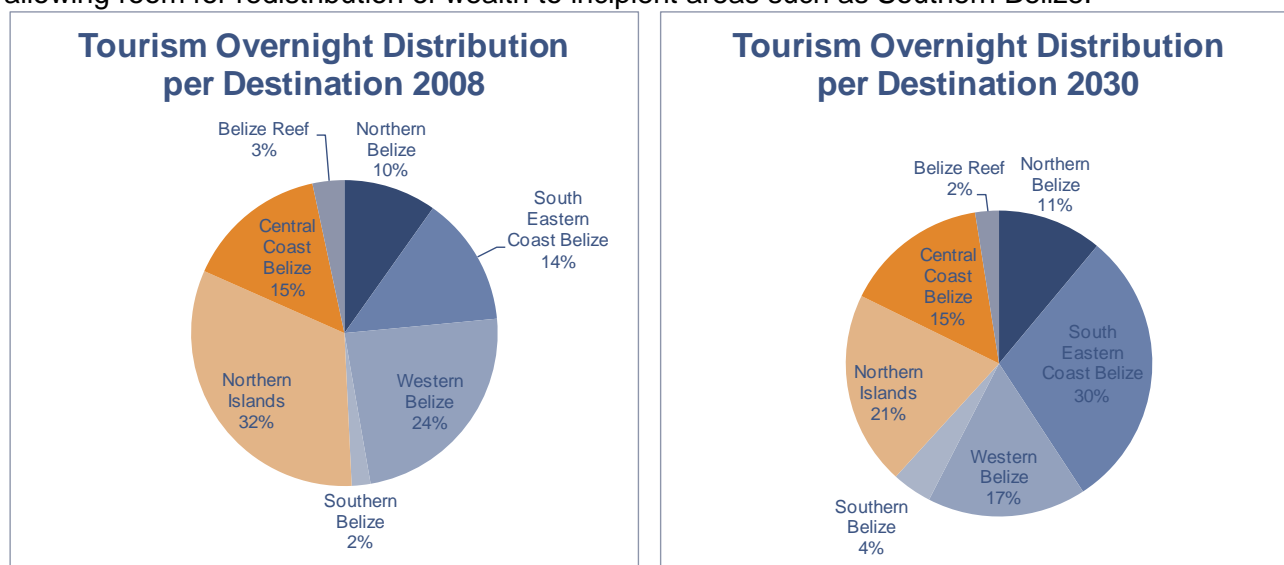
- ▶ **Western Belize:** San Ignacio city will be a demand driver, itself hosting a state-of-the-art welcome center, National Archeological Museum and charming village setting. The surrounding areas will have numerous nature and heritage trail systems and conceptualized adventure activities and facilities, nurtured by demand driven from high profile attractions such as Caracol and ATM cave systems.
- ▶ **South Eastern Coast Belize:** This distinctive destination will be hosting a chain of mid to low density sun & beach resorts, a chain of charming villages such as Placencia, Hopkins and Dangriga along with pristine and attractive beaches. This area will host mid-high end markets drawn by sun & beach, marine life and rainforest motivations; as well as it will become the main hub for nautical tourism development and the first to attract the pocket cruise market.
- ▶ **Northern Islands:** In Ambergris Caye, San Pedro will be regarded as a charming and attractive destination including a vibrant town with a walkable and attractive waterfront experience where beaches able to be enjoyed and unobstructed water scenery. Caye Caulker will continue to offer low-key charm along with attractive beaches and a cultural offering. Both destinations will provide a mainly nature-based niche product as well as nautical and sun&beach in second rank.
- ▶ **Central Coast Belize:** Will be dominated by a vibrant, urban tourism based in Belize City with a combination of preserved colonial-heritage architecture and modern entertainment facilities. It will host brand-name hotels as well as traditional style boutique hotels, for a growing

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overnight tourism market and various facilities for cruisers and yachts and sailing clubs. It will be the main hub for conventional cruise arrivals that will benefit from Belize's City cultural offering as well as sourcing nature based tourism motivations and links to other destinations.

- ▶ **Northern Belize:** In this region we will find easy access to a prosperous Corozal town hosting a mid-high end Leisure & Entertainment center. Additionally, Orange Walk district will be benefiting from rural tourism activities and the integrated development of Mayan Heritage sites.
 - Corozal: Will be established as a mid-to-high shopping and entertainment destination as it will have fully developed an attractive open-air mid-high end shopping center hosting well-known brands, restaurants, cafes, bars and entertainment facilities such as casinos, theaters, and bowling alleys, among others. The area will have good access by land, boat and border crossings. As a secondary motivation it will host cultural and nature tourism product offering such as Shipstern Nature Reserve, Corozal Bay, Sarteneja and the manatees.
 - Orange Walk: The destination will be hosting diversified cultural heritage, living traditions and nature based eco-tourism products with high involvement of local rural communities. It will cater to a well managed cruise visitors market while establishing a growing overnight sector.
- ▶ **Southern Belize:** This area will become highly attractive to hard adventure travelers and eco-travelers for its unspoiled nature allure, conceptualized adventure travel sports activities and facilities, community tourism attractions. In a second order it will develop cultural tourism heritage and living culture while integrating local rural communities. In another level it will be a sun & beach and nautical tourism destination for those attracted to more secluded area.
- ▶ **Belize Reef:** This unique chain of reef islands will be renowned internationally for its world heritage status and will be regarded by visitors as a pristine and well-preserved destination. It will cater mainly to day visitors and will have second order niche markets hosting exclusive sun & beach low density resorts and nautical tourism facilities.

The distribution of overnights from 2008 to 2030 will have shifted as new destinations emerge relieving pressure from current highly-concentrated tourism areas such as Ambergris Caye and allowing room for redistribution of wealth to incipient areas such as Southern Belize.



Source: 2008 BTB statistics, projections 2030 T&L, 2011

4 Strategy to reach 2030 Vision

The strategic goals that Belize aims to achieve through the implementation of the NSTMP are based on Belize's strengths and weaknesses and are selected to mitigate constraints as well as to take advantage of Belize's opportunities. To achieve this, the goals which the master plan aims to achieve in the period from 2012 to 2030 are structured into the following four groups:

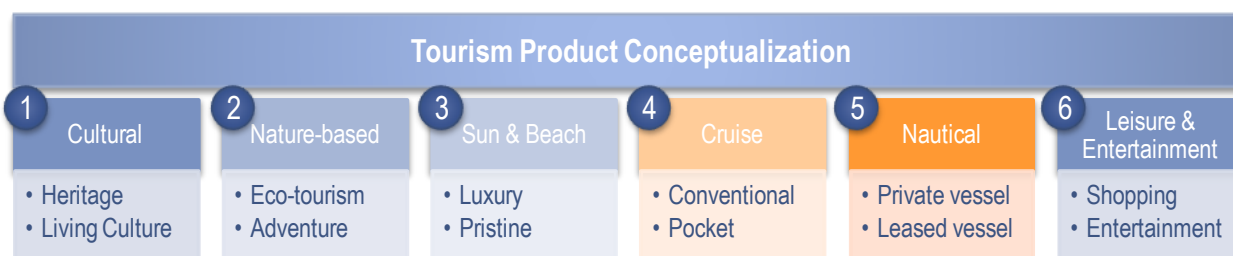


A set of specific strategic approaches has been defined with the aim of reaching the above mentioned goals that will ultimately translate into the previously defined vision or specific objective. The strategic approaches are followed throughout the entire implementation programs of the master plan as follows:

4.1 Strategy 1: Product development (Optimization Goal)

The first approach is to structure the tourism offering into a diversified product portfolio that maximizes tourism asset potential that meets the international tourism market expectations while minimizing environmental footprint while supporting cultural heritage, and local community development. Managing a tourism product portfolio will make possible the effective allocation of resources based on key objectives such as target markets; the balance of pipeline demand and pipeline resources available (such as priority criteria to channel economic resources); and strategic alliances within the industry to support tourism development that crosses political regional divisions. Additionally, it provides a framework that allows for sustainable development planning as it becomes more and more of a competitive advantage to consider sustainability aspects early on in the product development process.

The NTSMP has identified that Belize has strong potential to become a destination offering six main types of tourism experiences. These tourism experiences are umbrella product concepts that encompass numerous activity based products and niche segments linked by an overriding theme, resource, or target audience. Some of these products are already commercialized in Belize; however, all of them need to be further structured in order to enrich the tourist experience and enhance product diversification so as to meet international tourism market standards. The proposed product portfolio is composed of the following product concepts:



- **Nature-based Tourism** organizes Belize's ecotourism and adventure tourism products into a system of themed natural and man-made nature-based concepts structured into integrated recreational ecotourism and adventure sites and centers. In addition, it designs diverse nature-based themed routes and trails, such as the National Nature Tourism Trail System and

a National Caving Trail System, catering to the interests and needs of different niche segments. Unique Natural tourism assets, such as the barrier reef, blue hole and ATM will be commercialized under well managed sustainable development guidelines

- ▶ The **Cultural Tourism** product concept focuses on the development of cultural heritage and living culture sub-products. Its flagship creation is the development of a National Museum of Anthropology that will be strategically located in San Ignacio town. It defines the integral development of Mayan Heritage sites as a homogeneous tourism concept for all Mayan archaeological sites. Additionally it focuses on the creation of a chain of enchanting villages with a charming Belizean style appeal, rural tourism sites and routes and seasonal tourism attractions such as traditional markets, festivals and themed programs.
- ▶ **Sun & Beach Tourism** proposes the integrated development of sun & beach resort areas, pristine beaches and waterfront experiences in strategic locations on the coast of Belize and on reef islands, namely South Eastern Coast, Southern Coast, Northern Islands and reef islands.
- ▶ **Cruise Tourism** aims to structure Belize city and surrounding destination tourism assets as a structured and well managed set of attractive facilities and sites, such as Belize city waterfront experience and embellishment of Belize city colonial heritage neighborhoods, with an interactive welcome center in the Fort George area. Additionally, it will introduce the pocket cruise model as a viable option for cruise visits to the Southern Coast of Belize.
- ▶ **Nautical Tourism** structures a system of marinas, ports and services aimed at attracting tourists journeying in vessels (yachts, sail boats, boats, charter boats) across the Caribbean to come to Belize. Additionally, it aims to support the creation of yacht and sail clubs that link with international clubs and attract loyal customers.
- ▶ The **Leisure and Entertainment** concept is associated with a mid to high shopping and entertainment destination as it will have fully developed an attractive open-air mid-high end shopping center hosting brand names, restaurants, cafes, bars and entertainment facilities. The target area of development is Northern Belize, which is envisioned to be highly accessible by land, boat and border crossings. In a second order the concept is to be adapted and implemented in Belize City and San Pedro.

4.2 Strategy 2: Integrated destination development (Competitiveness & Sustainability Goal)

Following the product portfolio, the second approach is to focus on the integrated development of prioritized destinations and/or sites. The reasoning for this is to fully focus on creating the entire value chain for a product (which is based on visitors' main motivation for coming to Belize), creating experiences in a particular destination/site and therefore maximizing return on investment and multiplier effect. This approach will allow better management of the risk of running out of resources and being left with an offering of multiple unfinished products. This approach deems it safer to complete and maximize results of high priority projects and then proceed to second priority projects.

Additionally, through the creation of a destination planning integrated development framework, sustainability risks can be further mitigated by designating appropriate density models and appropriate safeguarding mechanisms that take into account social, environmental and economic aspects.

4.3 Strategy 3: Experiential quality enhancement (Competitiveness Goal)

As a fundamental and transversal approach, the Master plan focuses on the quality of service delivery and the creation of spaces that will enhance the value of tourism experiences in Belize.

The goal is to increase visitor satisfaction and confidence in Belize as a tourist destination that will ultimately result in increased customer loyalty and competitive positioning.

- ▶ **The hosting experience:** This starts from the notion that the ‘first impression is always the last impression’ to focus on enhancing the direct customer service experience. Therefore, the key is in building a professional and friendly hospitality human resources pool.
- ▶ **The visual context:** The quality of environmental conditions can either make the visitor experience superior or inferior. Therefore a consistent and strong focus is placed on enhancing the quality of the visual context in destinations and sites ranging from infrastructural projects such as the embellishment of villages and towns, to improving road conditions and signage, to awareness campaigns for garbage pickup. Furthermore, the plan will provide a set of land use and building guidelines to be applied to different destinations, according to their character and adapted to Belize styles.
- ▶ **The comfort of feeling safe:** An important part of the hierarchy of needs is the basic human need to feel safe and secure. If the destination does not fulfill this need, tourists may not fully enjoy their experiences in Belize. Therefore, considerable effort will be concentrated on enforcing codes, increasing security surveillance and emergency response, increasing minimum safety standards in the industry, enhancing safety of infrastructure and maintenance.

4.4 Strategy 4: Empowerment of Stakeholders (Leadership & Optimization Goal)

At the strategic level, stakeholder participation and channeling of benefits is key in order to reach long term sustainability and maximum economic profitability for the tourism sector. Keeping industry stakeholders aligned and cooperating will increase the chances of project implementation success, ensure targeted prioritization and maximum generation of local economic growth.

- ▶ **Stakeholder participation:** across all levels, local industry stakeholder participation is encouraged, from product development, to branding, new licensing requirements, and total quality management of sites, among all other industry development activities.
- ▶ **Maximum generation of local benefits:** empowerment and support of local SME development is encouraged and considered an essential element of integral development of destinations and sites; and an effort to find mechanisms to link tourism activity to poverty alleviation.

4.5 Strategy 5: Proactive solution to funding sources (Leadership & Sustainability Goal)

The final approach is a proactive mechanism of finding funding solutions for all levels of industry development. In the Belizean context where resources are limited, along with the initial approach of prioritization and concentration of efforts there needs to be in parallel a proactive search for funding sources. The proposed approach is to:

- ▶ **Find self-funding tourism development solutions:** Creating a National Sustainable Tourism Trust Fund whose main mission is to strategically channel tourism-industry-generated income into investments that will lead to the growth of the tourism sector. In addition, it will plan and design tourism destination development and proactively search for funding sources and investment partnership schemes.
- ▶ **Proactive search for investment partners:** Furthermore, in all programs and projects there encouragement is to be given to proactive generation of innovative funding solutions through strategic partnership schemes and aggressive searching for potential investors.

5 Implementation Programs at a glance

Each macro program is guided by the strategic approaches on achieving particular objectives of the 2030 vision that will lead to attainment the NSTMP goals. The macro programs formulate the actions that should be implemented in the destination structured into programs with subsequent subprograms and projects. Each macro program focuses on the core components of the Belizean tourism sector. The master plan's areas of focus are:

1. Tourism Governance
2. Tourism Sustainability and Quality Assurance
3. Tourism Infrastructures
4. Tourism Marketing
5. Tourism Product development

This structure of the master plan was chosen in order to:

1. Provide four umbrella macro programs (governance, sustainability and quality assurance, infrastructures, marketing) and one integral macro program (consisting of six tourism product programs) including transversal development projects. This structure will assure (even in case of reduced financing resources) the development of the tourism products and its specifics required in terms of governance, sustainability, quality assurance, infrastructure and marketing.
2. Develop and deliver manuals for specific development leaders and implementers. E.g. the macro program for tourism marketing should be implemented and lead by BTB, the product development macro program by BTB's product managers, and the tourism governance macro program should be implemented by MTCAC in cooperation with BTB.
3. Assure tourism sustainable development by including and partnering with different institutions and executors to implement and secure stakeholders support to develop programs and projects.

As far as the structure of the Product Development Macro-program, it will allow dissection of the product development approach and ease Product manager understanding of the different components to address in product development and with what actors/stakeholders they need to interact with to develop each core area. In the case of reduced budget where umbrella programs cannot be devised, sub-programs for priority products can be developed separately. Finally, it is designed to reach competitiveness in tourism product development sooner in the case of budget constraints. If there are restrains in the budget, resources can continue to be allocated in priority product business development to continue tourism growth

The tasks of each of these subprograms are clearly defined in the NSTMP as implementable projects, scheduled, budgeted and key players defined. In the subsequent pages a summary of the description of the program, its tourism 2030 vision, lead stakeholders, key objectives and description of the sub-programs are outlined.

5.1 Governance and Institutional Strengthening

Description

The National Tourism Governance Macro Program comprises of programs directed at raising the quality standards of the tourism service offering in order to reach international market demand standards and assure sustainable development of tourism economic resources.

There are four programs described:

1. Global governance and Management
2. Tourism Policy
3. Tourism Satellite Account
4. Tourism Safety and Security

The global governance and management program countenances the need to launch a process to coordinate all the players who have any kind of effect on Tourism, something to be done through the design of a Global Governance System for the management of tourism at a country level.

The tourism policy program develops crucial tools for Lobbying and partnering, Regulatory and financial instruments, and Public-Private Partnership models.

The tourism satellite account (TSA) program develops Belize's TSA which will be the reference for organizing the system of tourism statistics, and the scope of the action plan is to define the programs that have to be undertaken to set up a TSA on a regular year base accounting system.

The tourism safety and security program addresses the need to protect visitor wellbeing by tourism proactive policing and appropriate response mechanisms. Ultimately it aims at increasing the perception that Belize is a safe destination in the international market.

Vision 2030

- ▶ Government will foster a positive environment for the tourism sector and meaningful local participation in the sector.
- ▶ The tourism sector planning and management will be based on partnerships and collaboration; development of the tourism sector will be market-driven; all tourism activity will be designed to improve the quality of life enjoyed by Belize's citizens.
- ▶ The sector will benefit from a revenue stream of sustainable funds for promoting productive infrastructure investment, growth in product development, and encouraging better management of tourism resources.
- ▶ Policies and policy instruments that govern the tourism industry in Belize set clear and consistent goals for the future of Belize tourism.
- ▶ The principal of their design is to improve the quality of life of the population, finding the balance between catering to the needs of overnight tourists and cruise passengers, the fostering of a positive enabling environment for the industry, a strong local participation and that planning and management are based on partnership and collaboration agreements. Ultimately, policies and policy instruments lead towards a sustainable tourism progress.
- ▶ By 2030, Belize will have set up a statistical framework for the main tourism characteristic activities, for the main tourism demands that will be used as Marketing Intelligence System and to share data, mechanisms and information especially to further strategically monitor and develop Belize's tourism industry.

- ▶ By 2030, Belize will have developed and will be implementing a National Tourism Safety and Security Plan which will aim to structure and enhance the safety and security issues in Belize in order to position itself as a safe tourism destination.
- ▶ Additionally, it will count with a National Tourism Disaster and Crisis Management Plan that will aim to aid the tourism sector in mitigating, responding, and recovering from a crisis.

Lead stakeholder

- ▶ All three organizations (BTB, NSTTF³ and BELTRAIDE) should be closely linked as the main stakeholders leading the different activities towards a successful tourism development. A synthesis of the issues each of them should be responsible of are:
 - **BTB:** marketing/ product development/ quality development
 - **NSTTF:** master planning/ partnership development/ tourism works coordination
 - **BELTRAIDE:** investment promotion and business development
- ▶ The MTCAC is responsible for revising and amending current policies and deriving needed policies for the support of tourism product development.
- ▶ The lead responsible to develop the TSA program will be the Statistical Institute of Belize (SIB) with support from the BTB research and statistics team.
- ▶ MTCAC and the Police Department –TPU would be responsible develop strategies and programs to enhance the visitor's safety and security at the destinations, at sites and to develop communication/awareness programs specially dedicated to visitors.
- ▶ The MTCAC should lead the formation of the National Disaster & Crisis Management Committee along with lead stakeholders of the industry

Objectives

- ▶ To increase tourism GDP
- ▶ To increase competitiveness of the tourism sector
- ▶ To increase investment in tourism productive infrastructure
- ▶ To increase Foreign Direct Investment (FDI) and hotel development
- ▶ To boost local economic development through tourism income
- ▶ To reinforce the development of tourism activity and increase foreign currency revenue originating in tourism activity
- ▶ To foster and coordinate the participation of the private sector carrying out joint actions
- ▶ To plan the development of the destinations and regulate the subsectors
- ▶ To support the modernization and innovation of the tourist supply (companies, products, facilities, etc.)
- ▶ To aid the industry in decision making through the availability of reliable and relevant statistical information
- ▶ To prevent crime and visitor victimization
- ▶ To reduce the impact of natural disaster and industry crisis
- ▶ To increase visitor confidence in Belize as a safe and secure tourism destination

³ National Sustainable Tourism Trust Fund

Program summary

Sub-programs description
Global governance and management <ul style="list-style-type: none"> ▶ Sub-program for Tourism governance structures at national and regional levels aims to foster a well planned and represented tourism sector by securing political support, strengthening decision making level representation and encouraging regional integration in order attain sustainable tourism growth. The ultimate goal is to create <i>Ministerial Council</i> chaired by the Prime Minister where key ministerial bodies would converge to support tourism development. ▶ Sub program for Strengthening the Management Structure for Tourism Development creates a functional structure at the Belize Tourism Board that would support the Product Development approach, define core BTB additional functions, and create a fund raising position. ▶ Create a National Sustainable Tourism Development Trust Fund to promote investment, growth and development in the tourism sector, encouraging better management of tourism resources, while supporting The National Sustainable Tourism Master Planning. ▶ Sub-program for Strengthening of Investment attraction and tourism SME development strives to create a sound and competitive investment climate, enhance foreign investment promotional and facilitation activities and encourage professionalization of tourism SME local community
Tourism Policy <ul style="list-style-type: none"> ▶ Lobbying and partnering tools as a crucial instrument to place tourism policy as a main national policy of Belize. ▶ Regulatory instruments for creating a legal framework addressed to strengthen capacity and scope of action of Belizean tourism stakeholders. ▶ Financial instruments as different economic devices aimed at providing financial support to public and/ or private initiative in the tourism industry in general and hence strengthening stakeholder capacity from an economic point of view. ▶ Public-Private Partnership models in order to develop a portfolio of projects and initiatives where public-private partnerships are crucial for success in Belize's tourism development.
Program for Tourism Satellite Account <ul style="list-style-type: none"> ▶ The subprogram for TSA Tourism Activities Production Estimates sets up a statistical framework for the main tourism characteristic activities. The tourism statistical system is part of a major quantitative effort addressed to national accounts compilation, but it has to be worked out with specific statistical tools ▶ The subprogram for Accounting and Tourism Demand Estimates sets up a statistical framework for the main tourism demands. International tourism expenditure is only estimated for receptive tourism, and getting a grand total for daily expenses.
Tourism Safety and Security <ul style="list-style-type: none"> ▶ Sub-program for Tourism Proactive Policing plans to proactively address surveillance and response mechanism through the creation of a <i>National Tourism Safety and Security Plan</i>. ▶ The Sub-program for Visitor Safety Awareness and Support Services creates the appropriate channels to aiding and supporting tourists in the event of victimization and emergency situation. Additionally, the program promotes the creation of the <i>National Tourism Disaster and Crisis Management Committee (TDCMC)</i> with the goal of reducing losses related to natural disasters and other shocks to the industry by allocating resources to increase disaster resilience, cooperation in evacuation procedures and business continuity planning.

5.2 Tourism Sustainability and Quality Assurance

Description

The Sustainability and Quality Assurance Macro Program comprises of programs directed at raising the quality standards of the tourism service offering in order to reach international market demand standards and assure sustainable development of tourism economic resources.

There are three programs described:

1. Standards and quality management
2. Training and capacity building
3. Sustainable tourism development

The **Standard and quality management** section aims to raise the bar in minimum standard of tourism service delivery by increasing tour guide and tour operator licensing minimum requirements as a short term goal. In a second phase, and a long term approach, to raising quality standards it programs for an Integrated Tourism Quality Management systems where all stakeholders (public, private, civil society) participate in continuous quality improvements to the sector.

The **training and capacity building program** responds to the need of professionalizing the tourism human resources by addressing the quality of training and degree programs available in Belize. As a means of a long term solutions it envisions the creation of Hospitality Polytechnic Institute as a center of excellence for tourism hospitality training and tourism sustainable development research.

The **sustainable development program** provides the framework that will ensure the NSTMP maintains a balance of three pillars of sustainable development: social accountability, environmental conservation and economic prosperity. The program proposes mechanisms to address resource management and appropriate land use allocation while maintaining social and environmental safeguards and finding pro-poor mechanisms to link vulnerable groups to the tourism economic value chain.

Vision 2030

- ▶ Offer tourism services and facilities that are compliant with national and international quality standards attracting a mid/high-end clientele
- ▶ Developed excellence in its training and capacity building institutions providing diverse courses training meeting the needs and requirements of the tourism industry.
- ▶ The tourism industry growth will most efficiently and effectively harness the cultural, environmental and socio-economic benefits the tourism has the potential to provide.

Lead stakeholder

MTCAC should develop the standard and quality policies and regulations in conjunction with the local tourism stakeholders while BTB – Sustainability Quality Assurance department undertakes the executive task of enforcing quality standards and the operational licensing. Together with the local tourism industry, local NGO and community/municipality institutions, inclusion mechanisms and solutions can be recognized.

Objectives

- ▶ To improved visitor satisfaction in services delivery
- ▶ To increase Belize's tourism product offering competitiveness

- ▶ To position Belize as a World Class destination in integrated quality management
- ▶ To enhance local income generation through tourism income
- ▶ To secure sustainable planning and management of tourism resources
- ▶ To prevent land use conflict
- ▶ To alleviate poverty by effectively linking to the tourism value chain economic activities

Program summary

Programs & Sub-programs description
<p>Tourism standards and quality management Program</p> <p>The program suggests a participatory approach to finding common ground solutions that improve tourist satisfaction ratings and customer loyalty without hindering the economic growth potential of tourism business. The program consists of the following sub-programs:</p> <ul style="list-style-type: none"> ▶ Sub-program for Tourism Operational standards and licensing will devise new tour guide licensing categories and requirements, create tourism operational guidelines minimum standards and revise current licensing requirements. The program aims to increase income generating potential of the tourism sector through improving overall service standards, legislation mechanisms and support services. ▶ Sub-program for Tourism Integrated Quality Management (IQM) System and Certification is a long-term approach for continuous improvement of service quality delivery and is subject to constant monitoring and multi-stakeholder cooperation and commitment in finding and implementing solutions which will raise the bar, standardize and regulate tourism operations service delivery.
<p>Tourism Training and Capacity Building Program</p> <p>The Program addresses the gap in qualified tourism human resources through the revision of vocational training and tourism management curriculums and institutions, revision of tour guide training accreditation programs and the creation of a centre of excellence in tourism training and hospitality standards. The program consists of following sub-programs:</p> <ul style="list-style-type: none"> ▶ Subprogram for Hospitality Tourism Training Certifications and Degree Courses develops the human resources' operational and management skills required by the local tourism industry in terms of international standards with an emphasis in developing practical training opportunities relevant to the Belize context. The goal is to increase the quality of tourism services management and delivery in the tourism sector and will therefore directly result in an enhanced customer experience and stimulate growth of the local tourism economy. ▶ The Sub-program for Tour Guide Training and Accreditation enhances skills among the Belize network of National Tour Guides through revision and updating of the general accreditation training modules, addition of safety and security certification modules and developing a mechanism to train and certify in specialty activities. ▶ The Sub-program for Development of the Hospitality & Tourism Polytechnic Institute of Belize creates a facility whose core functions will be to operate a hospitality and training school of excellence, tourism vocational training programs, an eco-lodge and sustainable tourism research centre.
<p>Sustainable Tourism Development Program</p> <ul style="list-style-type: none"> ▶ The Sub-program for Tourism Resources Management and Conservation aims to identify and qualify an economic value of the resource in order to raise awareness and justify conservation efforts. The subprogram designs a plan to identify and assign an economic value of the tourism resources in order to define limits of change and validate conservation efforts. ▶ The Sub-program for Tourism Land Use Planning and Development Support aims to create a framework for tourism land use allocation that involves planning with social and environmental safeguarding criteria. The sub-program creates a land use master planning process of tourism zones as a standard for tourism development. ▶ The Sub-program for Pro-poor Tourism and Ethnic Groups Tourism Linkage supports efforts to identify and support vulnerable groups to benefit from the tourism economic value chain by strengthening the participation through the development of inclusion mechanisms.

5.3 Infrastructures for Tourism Destination Development

Description

In order to enhance positive sustainable impacts from tourism the destination must entirely be equipped with basic infrastructure, transportation infrastructure, tourism supply and facilities and skilled human resources.

There are two programs described:

1. Basic infrastructure and support services development
2. Development of national connectivity

According to the conclusions of the diagnostics, which pointed out the infrastructure elements constraining Belize's tourism development, Belize as a destination requires improvements in at least the following general issues:

- ▶ **Basic infrastructure and support services**, such as upgrading, expanding and enhanced management of water treatment, waste management, telecommunications and banking services.
- ▶ **Development of national connectivity**, responds to the need of transportation infrastructure improvements such as enhancing highways and road conditions, regional and international airport safety and capacity, sea port and pier facilities development.

The proposed general actions aim to cover those infrastructure gaps and hence to contribute to global tourism development of the country at national and regional/local basis. Specific infrastructure and facilities development actions contributing particularly to product enhancement will be covered in the "Product Development Macro-Program" – section of the NSTMP.

Vision 2030

- ▶ Provides its residents and the tourism industry with basic services such as electricity and energy, water and sanitation, refuse and waste removal
- ▶ Belize will promote the use green technology and renewable resources to effectively and sustainably solution energy and water consumption.
- ▶ Improved and enhanced means and possibilities of arrivals (in terms of quality, quantity and safety issues) and movement throughout the destination.
- ▶ Enhanced transportation handling capacities and modern facilities/services that meet international safety and quality standards.

Lead stakeholder

MTCAC should be the lead responsible institution for strengthening the implementation of these programs, while the other institutions such as the Ministry of Works and its departments will be the true executing task forces who will analyze the potential demand and system/infrastructural requirements for 2030, taking into account larger numbers of tourists and higher population at tourism destinations.

Objectives

- ▶ To increase tourism arrivals and tourism movement within the region and the country
- ▶ To reduce health hazards and visual and environmental pollution.
- ▶ To reduce consumption of scarce resources

- ▶ To improve application green technologies recycling and energy conservation
- ▶ To enhance transportation capacity by meeting increasing tourist arrivals and flows
- ▶ To enhance transport safety and reliability
- ▶ To enhance the tourism destination's competitiveness
- ▶ To increase the tourism satisfaction level

Program summary

Sub-programs description
Basic infrastructures and Support Services Development <ul style="list-style-type: none"> ▶ The Sub-program for waste management for tourism destinations strengthens the management and upgrading of existing systems at tourism destinations and tourism sites and assets throughout the country. ▶ The Sub-program for non-renewable resources management in tourism destinations will identify the needs and constraints of limited consumption of resources (water and energy) in tourism destinations and sites, as well as plan for the growth expected from integral development of tourism destinations projects. It devises appropriate solutions and investment schemes. ▶ The Sub-program for raising awareness and incentives stipulates the creation of awareness campaigns and incentive programs in order to enlist public support in reducing the pressure in the current and future systems. ▶ The Sub-program for telecommunication and banking services assesses the actual state of banking and telecommunication networks in Belize and proposes different steps to address the situation.
Development of National Connectivity <ul style="list-style-type: none"> ▶ The Sub-program for Air Infrastructures and transportation improvement will improve the international airport terminals in terms of infrastructure and facilities and enhance the services offered in order to cater for the expected numbers of tourists travelling to Belize. ▶ The Sub-program for Land connectivity and road infrastructure improvement improves Belize's insufficient land road infrastructure in terms of quality and safety required by international tourist and therefore improves the transportation standards through the country. In addition, it enhances the access of tourism streams to rural areas and neighboring countries and alleviates the sources for traffic congestions. ▶ The Sub-program for Sea connectivity and transportation improvement will foster additional connections to further tourism destinations by boat, ferry or water taxi. Additionally the program will enhance tourists' experience when travelling by sea and provide attractive facilities on piers by developing larger pier structures unifying various smaller ones.

5.4 National Tourism Marketing Macro-program

Description

The marketing development macro program structures actions to optimize the different promotion and communication efforts toward the local and international markets.

Actions area divided into three programs:

1. Strategic marketing
2. Tourism marketing network
3. Operational marketing

The strategic marketing program starts with the strategic plan and an intelligence system, as the two main tools to define strategies and country guidelines for marketing. Then it provides the framework to make products marketable, according to the overall philosophy of the NSTMP of Belize. Finally it considers civil awareness about tourism a key asset to reach in order to generate the appropriate climate for a complete tourism experience.

The marketing network program organizes the contact points to reach the market, either at the source markets or in the destination once in Belize.

The third program is focused to make the strategies **operational marketing**. It contents communication, travel trade and promotional activities. Furthermore, it has a specific sub-program to follow up all new technologies trends and opportunities for marketing. This program also includes a specific sub-program to increase and ease connectivity of Belize in all transport means (air, sea, land), which will lobby for new connections and frequencies, as well as conditions to operate in Belize.

It is important to mention that this NSTMP for Belize states and defines the strategic framework where operational activities and tactical decisions should be taken. These activities include source markets and segment treatments; decisions on specific tools or tasks to be done under promotion (such as trade fairs participation, road shows, etc). Also, within this plan, there is a special instruction for developing in a regular basis every year, an Operational Marketing Plan, where all the specific tasks and tactical decisions have to raise up.

Vision 2030

- ▶ Maintain and manage Management Information System (MIS) as a key tool for successful marketing
- ▶ Renew operational marketing every year and strategic marketing plan every 5 years
- ▶ Keep product development approach
- ▶ Offer multiple and innovative information distribution channels and an international representation network
- ▶ Use of dynamic market segmentation to target niche markets

Lead stakeholder

BTB Marketing Department and Product Development Department will be the main stakeholder to develop strategic and operational models to implement the suggested programs. Partnership with local stakeholders, Belizean “ambassadors” and international representatives are essential for the success of this program.

Objectives

- ▶ Position Belize as a World Class tourism destination
- ▶ Increase tourism intensity (arrivals, overnights, direct revenue and average length of stay) from the international and national tourism market
- ▶ Raise the general awareness on the destination products offering
- ▶ Enhance the overall visitor satisfaction of the experience traveling to Belize
- ▶ To enhance local income generation potential
- ▶ To optimize cost/benefit ratio of marketing actions
- ▶ To increase business sales by structuring BTB's new commercial booking possibilities
- ▶ To enhance arrivals to Belize through improved connectivity
- ▶ To position Belize as a World Class destination through targeted publicity
- ▶ To enhance visitor satisfaction through effective use of CRM models

Program summary

Sub-programs description
Strategic Marketing Program
<ul style="list-style-type: none"> ▶ Marketing Intelligence Management: creation of a Tourism Observatory for market intelligence as a key tool to optimize decisions and orient investments for tourism development in the country. ▶ Belize Tourism Positioning Management: Once the market oriented strategic plan is settled, a critical component for marketing is the definition and positioning of a tourism concept for Belize, its tourism products and destinations. ▶ Tourism Product Clubs Development Framework: As a strategic tool to develop quality and commercial products through a business adherence program that creates a network of business based on a product club concept and standard quality criteria. ▶ Tourism Awareness Development: broad tourism awareness campaigns for raising pride in Belizean culture and esteem of foreign visitors, an important aspect of the tourism experience.
Tourism Marketing Network Program
<ul style="list-style-type: none"> ▶ The sub-program for promotion network in Belize – tourism visitor centers defines, conceptualizes and develops information and welcome centers at tourism destinations and strategic points ▶ The sub-program for international tourism marketing offices will develop an international tourism marketing and representation network which will market and promote Belizean tourism at the market origin
Operational marketing Program
<ul style="list-style-type: none"> ▶ The sub-program for communication and promotion develops tourism marketing actions to increase the destination awareness worldwide and the direct potential sales. This should be planned according to the strategic marketing plan, and also monitored by the MIS. ▶ The sub-program for marketing with new technologies will develop opportunities including the usage of innovative tools for tourism marketing (i.e. enhanced reality, role games, holograph, helmet vision, 3D devices, etc.). ▶ The sub-program for sales and commercialization will focus on the usage of adequate commercial channel opportunities, in order to increase business sales using new formats and tools. ▶ Finally, the sub-program of national connectivity will focus on maintaining transport connections at the most developed level possible using all means of arrival in Belize (sea, air, land); and according to the development and capacity of the whole destination along time.

5.5 Tourism Product Development

Description

The Tourism Product and Quality Development macro-program has six programs, one for each of the selected tourism products to develop in Belize.

1. Program for Cultural Tourism Development
2. Program for Nature-based Tourism Development
3. Program for Sun and Beach Tourism Development
4. Program for Cruise Tourism Development
5. Program for Nautical Tourism Development
6. Program for Leisure and Entertainment Tourism Development

Each program is divided into a similar structure as the preceding macro-programs. Even though it may appear that their subject matter overlaps, these tourism product programs and sub-programs will be focused only in their specific area of expertise, leaving general and across-the-board interventions to the previous macro-programs. All programs are focused on one specific tourism product and they are all composed of the same sub-program structure, as follow:

- a. **Business & product development:** oriented to develop business concepts at destinations level. They intend to become the core concepts to appeal to the visitors.
- b. **Infrastructure & accessibility:** regarding accessibility to the area where the product is operated, the inner support infrastructure to assure the product operation; and in some cases, any very specific infrastructure which constitute part of the product itself.
- c. **Marketing & awareness:** focused on supporting specific marketing activities in order to reach the target segments including Product Specific Branding and marketing channels.
- d. **Standards & Safety:** include specific guidelines, standards and regulations needed for the product development and operations.
- e. **Capacity building:** specifically addressed product cluster human resources capacity development needs to operate with minimum quality guarantees.
- f. **Sustainability:** includes the identification, assessment and monitoring of specific natural and cultural safeguards needed to avoid degradation of tourism assets. Also, develops inclusion mechanisms in order to alleviate poverty, increase local community benefits and support community tourism related initiatives.
- g. **Governance:** focused on identifying specific regulations need for sustainable product development, on investment and fund raising to foster economic initiatives, and on specific public-private partnerships schemes.

The purpose of the structure of the Product Development Macro-program supports the leading criteria and approach of the Master Plan: to be product driven and to optimize resources by centralizing all aspects of product development under one program. Additionally, and in order “to be pragmatic” specifically in terms of budget availability and allocation, in the case of budget shortage, the tactic for implementation will be to focus on the priority Tourism Product Development programs first.

Vision 2030

- ▶ By 2030, Belize’s culture tourism and nature based tourism will reach consolidation and maintain sustainable growth while becoming the main motivations to visit Belize. The products will offer the visitor a diverse tourism portfolio with unique assets and destinations that are easily accessible, structured and highly conceptualized.

- ▶ Sun & Beach tourism is expected to reach consolidation by 2030. The product will offer the visitor a diverse portfolio including activities and facilities for both relaxation and entertainment by the coast.
- ▶ Cruise tourism would have re-launched to encompass two sub-products, conventional cruise and pocket cruise. Cruise tourism destinations will manage their resources and visitors in order to prevent any kind of negative impacts and deterioration.
- ▶ Nautical tourism is expected to become tourism product at a growing stage. Supported by a full system of marinas along the Belizean coast providing a full set of specialized services.
- ▶ A Leisure & Entertainment Area will offer mid-high quality products composed of brand name shops, leisure facilities and other value added services. Furthermore, the concept will expand to other destinations as a complementary offer.

Lead stakeholder

The MTCAC would be the lead stakeholder in charge of the policies development while each BTB's Tourism Product Managers are lead responsible for structuring their product portfolio and leading product conceptualization and development. They would liaison with other BTB departments for key support, such as Marketing, Sustainability and Quality Assurance. Additionally it will work with BTB fund raiser position and the NSTTF for sustainable funding sources. Other key stakeholders in product conceptualization, productive infrastructure and asset conservation are:

- ▶ NICH in partnership with local university scholars and anthropologists for cultural concepts and safeguard mechanisms.
- ▶ NGOs, Ministry of Natural Resources and Environment and Coastal Zone Management, for asset management and conservation efforts
- ▶ Ministry of Economic Development to support inclusion mechanisms for poverty groups.
- ▶ Ministry for Urban Development and Ministry of Works for destination integral development.
- ▶ Beltraide for attraction of foreign direct investment and business development support

Objectives

- ▶ To enhance the visitor's satisfaction level and competitive advantage by diversifying the tourism portfolio into experiential tourism offering
- ▶ To further distribute tourism flows by enhancing access and safety conditions
- ▶ To attract new markets and market segments by diversifying Belize's tourism product portfolio
- ▶ To increase income generating potential of local tourism industry
- ▶ To harness tourism growth as a sustainability for conservation efforts
- ▶ To increase the number of overnights spent at Belize's tourism destinations
- ▶ To increase local participation and reduce poverty pro-poor tourism mechanisms.

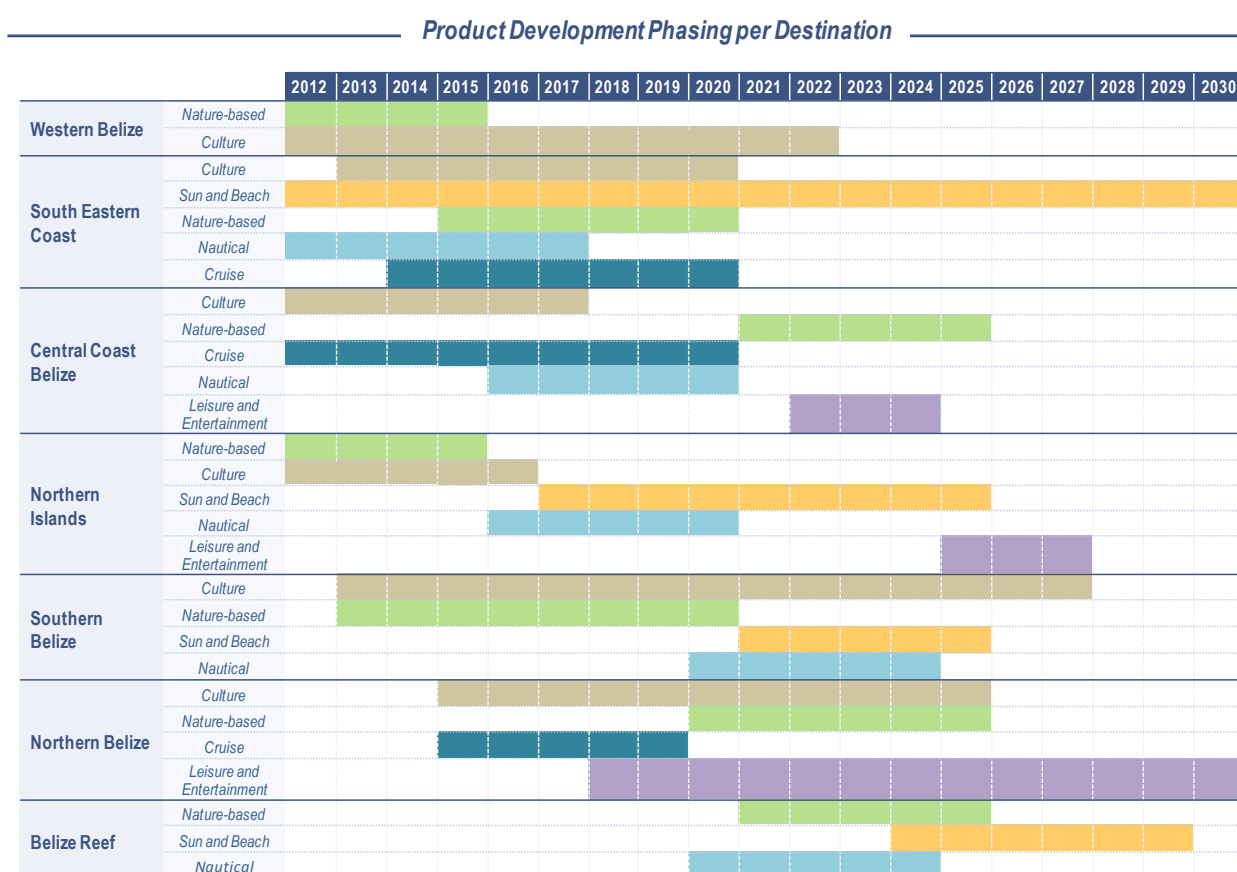
Program summary

Sub-program for Business and Product Development description
Cultural Tourism Development <ul style="list-style-type: none"> ▶ The design, master plan and development of Belize's National Museum of Anthropology showcasing Belize's different cultures, ethnic groups, traditional heritage and histories. ▶ The concept development for Mayan Sites Integral Development which structures, designs, planes and develops Mayan temple sites with similar infrastructure, services and facilities. ▶ The concept of Enchanting Belizean Villages that restores, embellishes, and revitalizes colonial heritage and historic buildings in order to enhance the qualitative visual impacts and the preservation of architectural heritage. ▶ The development of Rural Tourism Sites & Routes which develops the rural tourism portfolio by structuring traditional agricultural products as tourism products. ▶ The concept development of Belize Traditional Markets, Festivals and Themed Programs to develop the living culture portfolio by focusing on mechanisms that foster the participation of local communities and strengthens the inclusion of ethnic groups and minorities.
Nature-based Tourism Development <ul style="list-style-type: none"> ▶ The concept development for Belize's Ecotourism & Adventure Activity Centers which provide the visitor with information and an introduction to the destination, its assets and its tourism products. ▶ The design, master plan and development of Ecotourism & Adventure Routes linking together Belize's different nature-based tourism sites and structuring them as attractive tourism destinations. ▶ The concept of Integral Development of Ecotourism and Adventure Sites which structures, designs, master plans and develops sites into an integrated system of infrastructure, services and facilities, developing the entire value chain.
Sun & Beach Tourism Development <ul style="list-style-type: none"> ▶ Belize Waterfront Experience Development using the coastlines and structuring them into an attractive visitor asset providing diverse entertainment facilities and services. ▶ Belize's Pristine Beaches, the program provides a strong emphasis on the establishment, conservation and preservation of the beaches' pristine quality standards and safety regulations for which they will be internationally promoted and renowned. ▶ Sun & Beach Destination Development will structure the sun & beach destination with its required development projects depending on the destination's concept, the sustainable use of resources and on the existing demand. However, Southern Belize, South Eastern Coast Belize and Southern Belize will require designing and master planning of their destinations which are to be developed from the ground up.
Cruise Tourism Development <ul style="list-style-type: none"> ▶ Belize City Main Cruise Hub Development which will enhance the urban zoning of Belize City by restoring and embellishing the city area, and will develop services and facilities to enhance the visitor experience at the destination. ▶ Pocket Cruise Development develops an integral development of the pocket cruise port including services and facilities for small cruise vessels and supporting tourism and leisure services and infrastructures for visitors. ▶ Belize Cruise Negotiation and Destination Management Committee will manage the cruise destination and act as a negotiator for international cruise companies to enhance the benefits from the cruise tourism industry.
Nautical Tourism Development <ul style="list-style-type: none"> ▶ Integral Marinas Destination Development identifying the most appropriate concept/business model and creating a network of marinas and sail clubs. ▶ Destination Development of Nautical Tourism feasibility analysis for the destination and marina terminals, hence the master planning, mix use facility development, business development planning, the land/sea infrastructure, etc.
Leisure and Entertainment Tourism Development <ul style="list-style-type: none"> ▶ Belize National Leisure Area Development which will conceptualize each destination's tourism product business model and develop the master planning and land use framework and search for potential investors and operators.

6 Implementation considerations

6.1 Product Phasing schedules

The NSTMP for Belize will be implemented from 2012 until 2030, in 19 years. The intervention is phased according to two criteria: tourism products' priority for Belize; and tourism products' priority for each destination. The combination of these two criteria finally defines the following phased intervention:



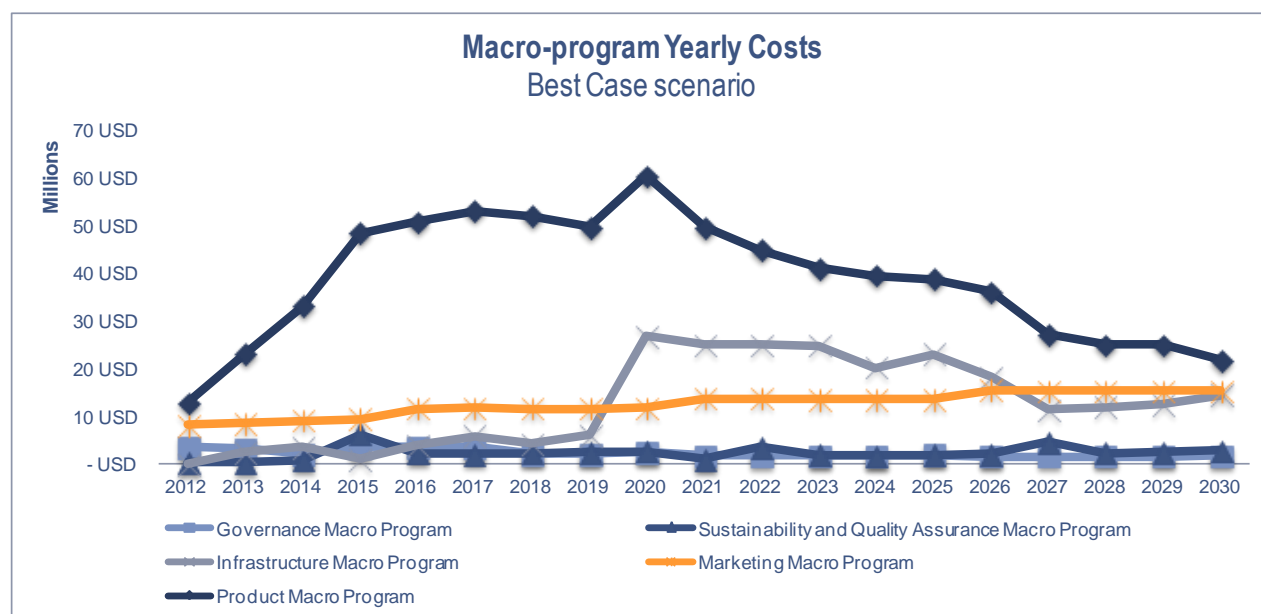
Source: T&L analysis, 2011

As a tourism-product-driven plan, all programs aim to support tourism product development. This, as well as other considerations related to convenience, urgency and cost effective results, will finally determine the implementation schedule.

It is also important to mention that all activities have to respect a process cycle, which basically means that even though they are planned to start in some specific moment, the major investments are not supposed to take place in that specific year. The projects will require an organization and lobby process, planning and modeling phase, and then construction and implementation. Finally, many projects require follow up, maintenance or updates, which are also part of the implementation schedule.

6.2 Budget allocation

This product phasing considerations of the implementation schedule of the NSTMP will affect the funding and financing schedule, providing differences in terms of funding allocation over time. The estimated preliminary budget will be a compound total of US\$1,305 million until 2030. The allocation evolution by macro-program will be:

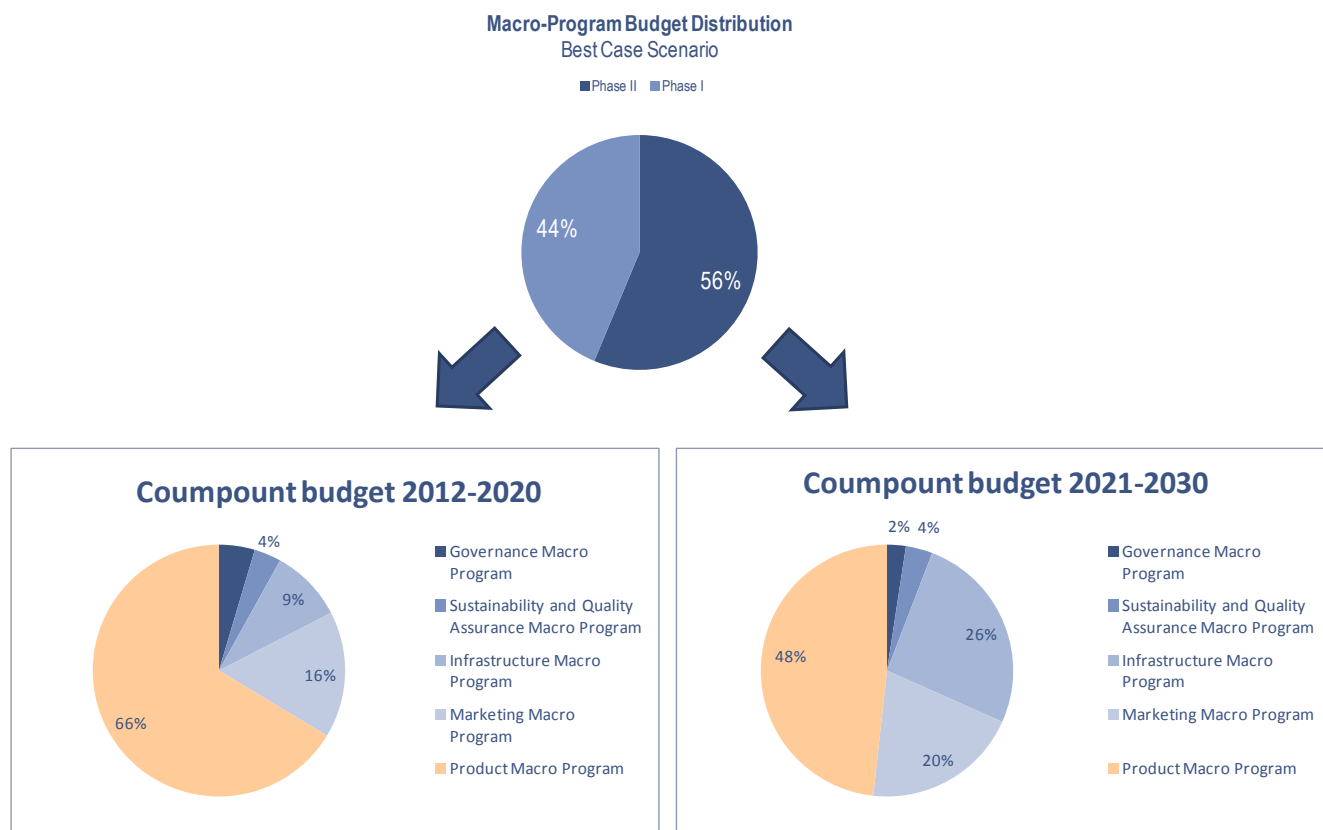


The Tourism Product Macro Program is clearly the one that leads budget allocation. Its most intense investment moments will be between 2015 until 2020. From there on, the investment will slowly decrease. The criteria behind this is to work from now until 2015 in order to get investment funds for product development, and then have some time to build and consolidate them. Especially the development of the new development in the area of Riversdale in Southern East Coast, the leisure and entertainment areas and nautical development. With 2020, the Infrastructure Macro Program is scheduled to start undertaking the national land connectivity including road improvements and enhancements and therefore create an investment peak. The Marketing Macroprogram evolves increasingly according to the need of commercial support for the consolidated tourism products. Finally, sustainability and quality assurance acts regularly over time, as does the Government macro program. This last named, despite having relative low volumes of budget allocation, is key for the whole plan's success.

The entire process can be divided into two major phases:

- **Phase 1. 2012 – 2020:** this phase allocates 44% of the total compound estimated budget for the Plan (US\$579 million), with 31.2% of the total allocated from 2012-2015 (US\$180.8 million), and 68.8% for the period 2016-2020 (US\$398 million). The largest component of the budget will be investment in the Tourism Product Macro Program, followed by Marketing activities. Notwithstanding, Governance projects implementation and positive results are the key for the rest of NSTMP success. Culture and Nature Based Tourism will take the lead in development, aiming to create a solid and competitive offering for the international market. In many cases, these two tourism products need site investments and specific infrastructure and equipment, while general accessibility or infrastructure are not so fundamental for those products (either in terms of market, tourism experience and volume of visitors). All in all, the reasoning is to create competitive tourism products.

- ▶ **Phase 2. 2021 – 2030:** this second phase gives protagonism to supporting infrastructure development and marketing, which will account for almost 50% of the entire budget planned for the phase. The new destination development in Stann Creek new Riversdale will be under construction, which will require extra investment in infrastructure. Marketing activities will rise, since culture and nature based products will be already working and competitive, and new destinations/products will need commercial support to attract visitors, and therefore investors for those new developments. This phase concentrates 56% of the total compound budget (US\$725.9 million).



6.3 Implementation and funding

In order to ensure long term sustainability of the NSTMP the responsibilities of implementation and control will have to be centralized by a unique **coordination agency** which coordinates the actions of the **implementation agencies**, the **strategic partners** and monitors and evaluates the implementation progress.

- ▶ The *coordination agency* will be responsible in executing the master plan objectives and comprised of three supporting units: management unit, implementation unit, monitoring and evaluation.
- ▶ The *implementation agencies* are supporting and implementing the decisions of the coordination agency and its units. These agencies are public organizations and associations specialized in specific domains such as public work, education, business and investment.
- ▶ The *strategic partners* represent the organizations and the tourism companies that will have a role in the specific projects of the macro programs.

The coordination agency will have the Project Implementation Manual as a tool to guide in management and control. This tool provides a synthesis of the identified lead implementers per macro-program, reduced budget scenario analysis, key priority investment projects, results framework, and risk management guidelines.

Additionally, and in order to assure long term political support for the NSTMP, the following mechanisms should be devised:

- ▶ Create a coordination agency that is managed by a technical team that is not politically oriented and is continuously funded beyond political will
- ▶ Creation of a Council of Ministers where key ministerial bodies would converge to support tourism development.
- ▶ Lobby for an affidavit for every running prime minister to sign agreement of maintain master plan goals after obtaining office. This will have a double benefit:
 - a. Will allow running minister to have a tourism development plan to support
 - b. And will ensure long term sustainability of Master plan implementation

In order to achieve a sustainable funding mechanism for the implementation of the NSTMP the following key considerations are to be taken into account:

- ▶ There is an urgent need to further analysis current tourism sector taxation budgets, allocations and rates in order to devise if additional taxes is a viable mechanism for fund raising
- ▶ Search for short-term and medium term funding sources while preparing a long term solution, identified possible solutions are:
 - Short-term: BTB 2012 budget planning
 - Short/mid-term: Classical ministerial budget allocation
 - Mid-term: Multilateral and donor agencies
 - Mid/long term: Partnership schemes with Private sector
 - Long term: National Sustainable Tourism Trust Fund
- ▶ Concerning budget availability, five scenarios have been considered:
 - Best case scenario, is the case where 100% of the NSTMP is implemented, resulting in USD 16.6 billion of compound incremental income
 - Worst case scenario, is the case where the NSTMP is not implemented, which results in a potential income loss of 65%
 - In Scenario 1 a 20% reduction of total investment results in a reduction of 29% of the compound incremental income⁴
 - In Scenario 2 a 47% reduction of investment results in a reduction of 59% in the compound incremental income
 - In Scenario 3 a 57% reduction of investment results in a reduction of 79% in the compound incremental income

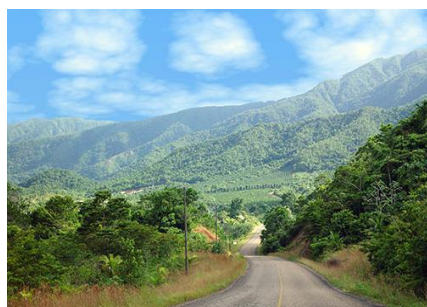
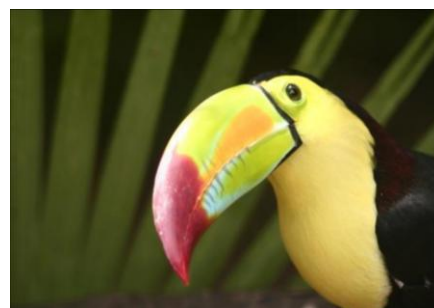
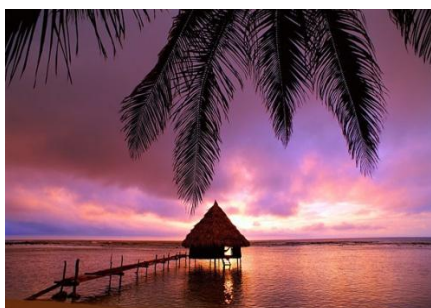
The overall investment analysis comparison shows that the *best case scenario* is the most cost-efficient scenario and the one with the highest return on investment

⁴ The *compound incremental income* is the difference between the total compound income generated by the best case scenario MINUS the total compound income generated by the worst case scenario

EXECUTIVE SUMMARY

DIAGNOSTIC OF THE TOURISM SECTOR

National Sustainable Tourism Master Plan of Belize 2030



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1. Introduction

Belize is a Central American country characterized by having fascinating underdeveloped nature and culture sites, a fact that has enriched its attractiveness and motivated an increasing number of tourists. The tourism industry has been developed up to the point of becoming an internationally recognized tourism destination with a wide range of tourism operators and employing a great number of Belize's population. Along these lines, the tourism sector in Belize is one of the main economies for the country accounting for 28.2% of the total GDP equivalent to BZD816.3 million and 28.3%¹ of the total employment.

The rich historic background of the Country is reflected by numerous heritage sites mostly Mayan sites with great value for tourism. However, many Mayan sites remain unexcavated and covered and have difficult access by road. Regarding ecotourism sites, Belize is characterized by having one of the most attractive coral reefs on earth including the iconic Blue Hole marine reserve and other many reserves and biodiversity. Accessibility and conservation are a major challenge in order to ensure a proper and sustainable tourism planning of these sites.

Under this scenario of tourism potential, this sector faces some challenges and needs certain amount of reforms in order to ensure sustainable and prospering economy of the region.

The Belize Sustainable Tourism Program (STP), with the intention to contribute to sustainable growth for Belize's Tourism sector, consists of two main components based on investment in the tourism destination and institutional strengthening and capacity building for policy, destination planning and management. Component II is based on the priorities of a National Sustainable Tourism Master Plan and five key destinations development plans.

Within the framework of the National Sustainable Tourism Master Plan, the overall objective of the present document is to provide a scoping and diagnostic report of the current situation of the tourism sector in Belize, as well as a first preliminary strategic approach that will be validated with STP and BTB serving as a basis for the future development of the National Sustainable Tourism Strategies.

The report contains a complete analysis of the tourism sector identifying the main challenges Belize tourism sector is presently facing. The following is a list of the several issues contained in the report:

- ▶ Research and evaluation of Belize tourism market from a demand point of view
- ▶ Identification and assessment of Belize's relevant tourism assets according to their attractiveness and market potential
- ▶ Analysis and evaluation of the tourism facilities and services, as well as the tourism industry operating in Belize
- ▶ Assessment of the main environmental and social issues of Belize specially which are affected by tourism
- ▶ Assessment of the institutional capacity and participatory governance in Belize
- ▶ Identification and exploration of the opportunities of the tourism industry in Belize

¹ World Travel & Tourism Economic Research – 2010 Travel & Tourism Economic Research for Belize

2. Tourism Governance Analysis

The goal of this task is to present the relevant governmental bodies involved in tourism issues in Belize and assess the institutional capacity in terms of public administration's structure. The institutional capacity of stakeholders is a key tool for understanding the social and institutional context of a project or policy.

The governance analysis provides a foundation and structure for the participatory planning, implementation and monitoring. Further, the National Tourism Policy will be analysed, focussing on organisational instruments, such as the Belize Tourism Board; general sector plans, programmes, and regulatory and financial instruments that are utilised to govern tourism in Belize.

The outcomes of this task are potential gaps and opportunities in participatory governance for tourism development, which will be highlighted at the very end of the document in section 5 Final Conclusions.

2.1 Assessment of institutional capacity and participatory governance

Belize's governance framework is composed by a set of stakeholders from the public, private and civil sector, which are active in undertaking several tourism development initiatives.

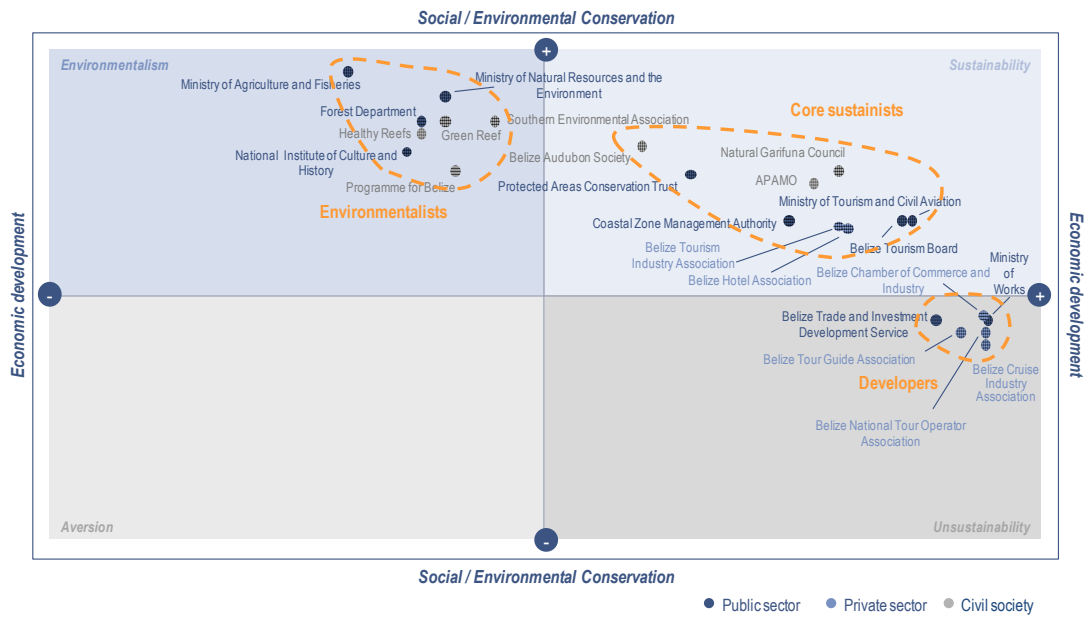
Belize Key Tourism Stakeholders by Sector

Public	Private	Civil (Social and NGO's)
<ul style="list-style-type: none"> ▶ Ministry of Tourism and Civil Aviation ▶ Ministry of Natural Resources and the Environment ▶ Ministry of Agriculture and Fisheries ▶ Ministry of Works ▶ Belize Tourism Board ▶ National Institute of Culture and History ▶ Coastal Zone Management Authority ▶ Forest Department ▶ Protected Areas Conservation Trust ▶ Belize Trade and Investment Development Service 	<ul style="list-style-type: none"> ▶ Belize Tourism Industry Association ▶ Belize Chamber of Commerce and Industry ▶ Belize Hotel Association ▶ Belize Cruise Industry Association ▶ Belize National Tour Operator Association ▶ Belize Tour Guide Association 	<ul style="list-style-type: none"> ▶ Belize Audubon Society ▶ Southern Environmental Association ▶ Programme for Belize ▶ Green Reef ▶ Healthy Reefs ▶ APAMO ▶ National Garifuna Council

Once the key stakeholders have been identified, their possible interests in the project should be highly considered. Some stakeholder interests are less obvious than others and may be difficult to define, especially if they are hidden, multiple or in contradiction with the stated aims or objectives of the organization they represent. Nevertheless, there are two objectives that should be highlighted stakeholders aim from the project: economic development and social/ environmental conservation.

Belize's Tourism Master Plan, and especially considering the particularities and sensitiveness of Belize tourism assets, will be strongly conceived from a sustainability approach, which means any development in tourism should be considering any social/ environmental relevant issue setting a balance between economic development and conservation. Therefore, contribution from those stakeholders sustainable tourism focused (core sustainists) should be highly considered, and therefore be the critical partners of the project.

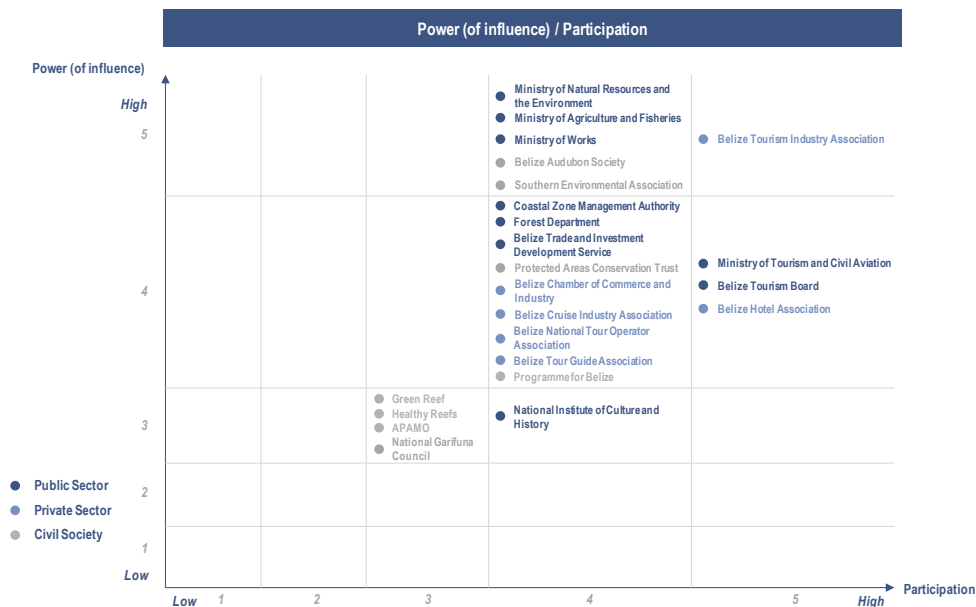
Belize's stakeholders' interest Matrix



The core sustainists (sustainable tourism focused stakeholders) identified are: the National Garifuna Council, APAMO, the Belize Audubon Society, the Belize Tourism Industry Association, the Belize Hotel Association, the Ministry of Tourism and Civil Aviation, the Belize Tourism Board, the Coastal Zone Management Authority and the Protected Areas Conservation Trust.

The other stakeholders are classified by their interest of either supporting an environmental approach or those following an unsustainable path. It is then the aim of the most powerful core sustainists to influence these stakeholders to follow the path towards sustainable tourism.

Factors such as power and participation on tourism policy development of different stakeholders could also be ranked along simple scales, and mapped against each other, as a step in determining the grade of each stakeholder's participation according to their power of influence.



From the previous model, it should be remarked BTB's general approach to governance is to involve Belize tourism stakeholders as much as possible through participatory processes, involving not only national but also local stakeholders. The model analyzing Belize's participatory governance highlights as well the particular involvement of certain stakeholders in the core decision making processes which are BTIA and BHA, in addition to other individual members of the tourism business involved, since those two institutions and those individuals are members of BTB's Board of Directors.

2.2 Tourism policy analysis

The analysis of Belize's Tourism Policy focuses on its organizational instruments, such as the Belize Tourism Board (BTB) in terms of its responsibilities and duties, on general sector plans, programs and policies, and on regulatory and financial instruments.

Organizational instruments

BTB is in charge of researching, planning, developing and promoting the tourism industry, its resources and its local tourism products on a national and international level. It is among others accountable to create programs to increase tourist traffic to Belize, to foster favourable arrangements for the entry of tourists into Belize, encourage the development and promotion of capacity building programs for staff employed in the tourism industry and to raise the awareness of environmental protection and conservation of resources.

BTB is composed of four operational departments, namely the product development department, the hotels department, the marketing and public relations department and the finance and administration department. In the near future, further departments will be added to the organization: the Destination Planning Department and the Tourism Police & Security Unit.

The following graph presents the organizational structure of the BTB, as it will be initiated in the near future.

BTB's New Organizational Structure



BTB is governed by a Board of Directors appointed by the Minister of Tourism. The Board itself is composed of ten members - chaired by the Minister of Tourism - who are appointed directly by the Minister. Nine of the members belong to the private sector, representing some of them institutions such as the BTIA and BHA. Hence, the BTB governance structure is based on a strategic partnership between the Government of Belize and the tourism private sector.

General sector plans, programs and policies

Belize's Tourism Policy is designed under the following and further principles: to improve the quality of life of the population, finding the balance between the needs of stay over tourists and cruise passengers, the fostering of a positive environment for the industry, a strong local participation and that planning and management are based on partnership and collaboration agreements.

The policies and strategies are summarized and classified in the following documents:

- ▶ A Tourism Strategy Plan for Belize (1998)- The report provides an analysis of the current tourism climate and providing a thorough ten year strategy with the specific targets of growth of the national GDP, a 20% increase in total tourism- related jobs and an annual increase of 20,000 visitors. Further strategies mentioned are: a growth management strategy and a strategy to encourage Belizean ownership through the tourism sector. The report focuses on the development of administrative bodies and the infrastructure in terms of accessibility and product development.
- ▶ Belize Tourism Policy (2005)- A policy report by the Belize Tourism Board to reassess the current priorities of the organization and to propose concrete plans for archiving the Board's goals beyond the timeframe of the Tourism Strategy Plan— including policies embracing Belize as a “eco-ethic” destination management— strike an important balance among the main tourism segments (stay over and cruise passengers), market the product development as a nature-based and adventure tourism destination, strengthen linkages with other national priorities and further marketing and promotion policy including market researches to identify the demand for the development of further niche products.
- ▶ Belize Cruise Tourism Policy- The policy report outlines the national priorities for the Belize cruise visitor market, the laws and policies for cruise ships, and the associated environmental concerns. This document treats security arrangements at strategic locations to enhance the visitor's experience, sets asset capacity levels to prevent overcrowding and guidelines on training for tour guides. It promotes cultural involvement to cruise passengers for encouraging overnight stays and sets guidelines on how to establish linkages between cruise ship needs and local suppliers.
- ▶ Belize Tourism Board Action Plan (2009/2010)- A presentation by the Belize Tourism Board that outlines the finances of the Board and addresses the progress, goals, and plans for the Board going forward.

Regulatory instruments

There are only few legislation acts that maintain the regulations and standards for Belize tourism. These are listed as follows:

- ▶ Belize Tourism Board Act (2000): The foundational act outlines the composition, responsibilities, and powers of the Belize Tourism Board (BTB).
- ▶ Belize Timeshare Act (2007): The Act details the laws and regulations that monitor the timeshares used for tourism accommodations.

- ▶ Belize Hotels and Tourist Accommodation Act (2000, revised): The Act outlines the registration process for accommodations, the standards each must abide, and the legal stipulations for adhering to the stated guidelines.
- ▶ Belize Hotels and Tourist Accommodation Act Subsidiary Laws (2003, revised): The subsidiary laws provide a supplement to the primary act by specifying the minimums and requirements for various types of tourist accommodations.

Financial instruments

The Government of Belize (GOB) offers specialized and effective incentives to attract investments to all sectors of the Belizean Economy. However, **there is only one Fiscal Incentives (FI) Scheme that is applicable to the tourism service sector**. A tourism specific scheme is being prepared by the Ministry of Tourism, and a draft will be finalized by October 2010.

A special fiscal incentives act addressed to SME's is being designed and created to encourage investments by Belizeans, who are, as of today, investing below USD\$150,000.00.

2.3 Tourism governance critical issues

Main conclusions from the governance and policy analysis assessment raise the following issues:

Institutional capacity

- ▶ A **broad set of stakeholders and interest groups** are composing the governance network of Belize's tourism sector. Main partners to be considered in the Master Plan should be the **sustainable tourism focused**. Environmentalists and strong developers should be involved to follow the sustainable path.
- ▶ **Certain core stakeholders should be highly considered** in the definition and implementation of Belize Tourism Policy due to the **strong impact of their activity in the tourism sector** (Ministry of Nature Resources and the Environment, Ministry of Agriculture and Fisheries, Ministry of Works, Belize Tourism Industry Association, Belize Audubon Society and Southern Environmental Association).
- ▶ **The Ministry of Tourism and BTB do not have the desired power of influence**, since certain key stakeholders such as the Ministry of Works and the Ministry of the Environment do plan their own policies, and projects for implementation, without considering their inputs. Presently investments ranging from infrastructures to tourism supply management are being made without the input of the tourism sector.

Governance

- ▶ **Setting the eligibility criteria** for BTB's Board membership and **providing transparency in the decision making** of the members enrolling the Board are critical for good governance. The Governance structure of BTB should be composed of members representing the industry as a whole, and therefore avoiding as possible individual interests.
- ▶ BTB's general approach to participatory governance is **to involve Belize tourism stakeholders as much as possible through participatory processes**. However, involvement should not be limited to policy definition but also on implementation phases.

- ▶ **Good involvement of certain stakeholders in the core decision making processes** which are BTIA and BHA, in addition to other individual members of the tourism business involved.
- ▶ **Further implication of key stakeholders is strongly required** such as the Ministry of Works and the Ministry of Natural Resource and the Environment, due to the high impact of their activity into the tourism sector.

Tourism Policy and Management

- ▶ **BTB has limited responsibilities to manage Belize as a tourism destination**, since the scope of work of BTB is constrained basically to marketing, registration/licensing and capacity building issues.
- ▶ **BTB is under-resourced to face the present and future challenges.** The organization should be implementing a funding mechanism encompassing core government funding together with BTB's own resource generation and contributions from the private sector.
- ▶ **Limited presence of BTB throughout the country**, since a part of their headquarters in Belize City, the organization is only present in San Pedro, and thus tourism visitor centers are not available in other relevant districts of the country.
- ▶ **Certain BTB departments have limited functions** and some relevant activities are not being undertaken by the organization.
 - Even though a Product Development department exists, their responsibilities are limited to quality assurance and training, rather than identifying product development gaps and strengthening Belizean tourism products.
 - Responsibilities of the future Planning department are limited, since BTB does not have the competence on planning issues.
 - Lack of a unit to achieve quantifiable results from the marketing activity, which means a unit focused on commercializing tourism products to target customers.
 - No department within the organization is responsible of developing new tourism facilities and services, ensuring appropriate basic and transport infrastructures, and fostering SME's development.
- ▶ Lack of a networked model used as a **lever to create a new solution and transform existing operations**. Issues such as product development, commercialization, development of facilities, etc. could be developed together with qualified partners to provide greater value to tourists, as well as the private sector and the Belizean civil society.
- ▶ Policies and procedures that drive the efforts of the tourism industry in Belize set **clear and consistent goals for the future of Belize tourism**.
- ▶ The legislation for tourism in Belize sets out a **comprehensive system for administering tourism and for setting the necessary regulations and standards** to maintain the quality of Belize's tourism industry.
- ▶ The Government of Belize (GOB) offers specialized and effective incentives that attract investments to all sectors of the Belizean Economy. However, **there is only one Fiscal Incentives (FI) Scheme that is applicable to the tourism service sector**. A tourism specific scheme is being prepared by the Ministry of Tourism, and a draft will be finalized by October 2010.

3. Tourism Market Analysis

The tourism demand analysis helps to understand current tourism markets and visitor segments, trends and opportunities and will serve as a basis for the tourism product design phase. The second part of this chapter will assess potential tourism demand through projections in different scenarios and presents the projected outcome after implementing the master plan suggested.

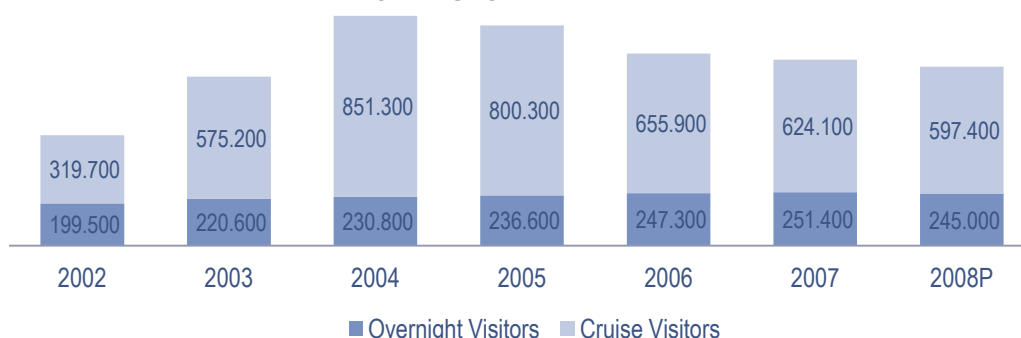
3.1 Visitor statistics

International Visitor Arrivals

Total international visitor arrivals to Belize increased by 18.6% overall from 2002 to 2008. From 2004 to 2008, however, total arrivals decreased by an average of 6% per year

Variation in the overall arrival numbers over this period was largely due to the changes in annual cruise arrivals. Since cruise arrivals made up an average of 72% of all arrivals to Belize, the increase in cruise visitors from 2002 to 2004 and the decrease from 2004 to 2008 caused similar patterns in the overall arrival numbers.

**Evolution of International Visitor Arrivals to Belize
by Category of Visitor (2004-2008)**

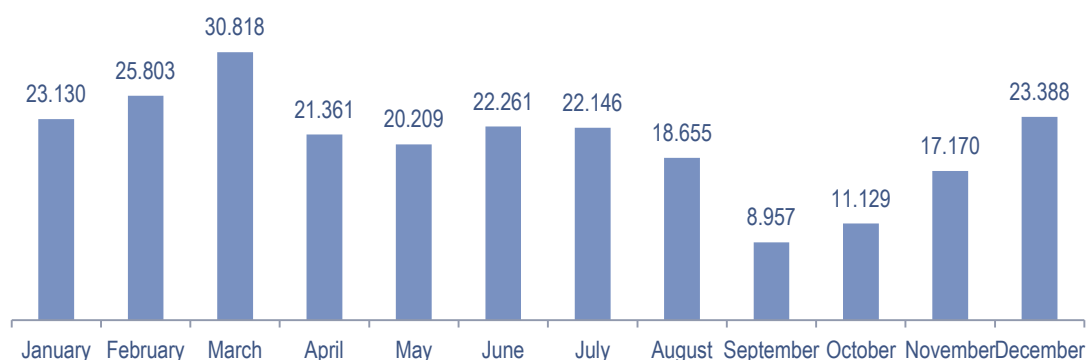


Source: Belize Travel and Tourism Statistics 2008, Tables 1.9 & 1.10

P = Preliminary R = Revised

In 2008 over 842,400 visitors came to Belize. Of those visitors, 597,400 were cruise passengers on day trips, while 245,000 were overnight visitors.

Overnight Visitors to Belize by Season 2008

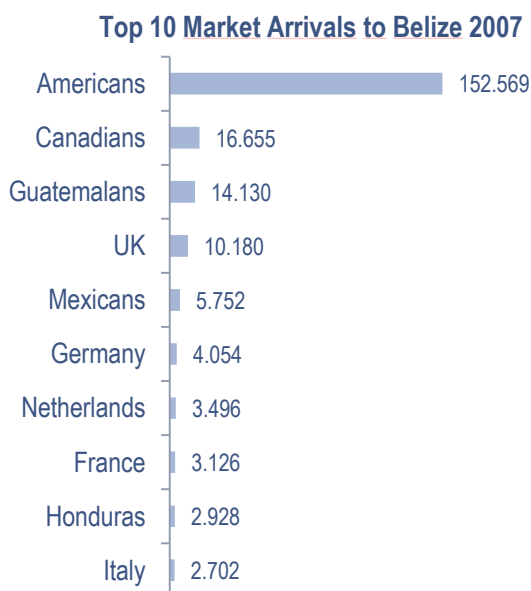


Source: Belize Travel and Tourism Statistics 2008, Table 1.12.

In 2008, arrival numbers varied from 9,000 to 31,000 overnight visitors per month with

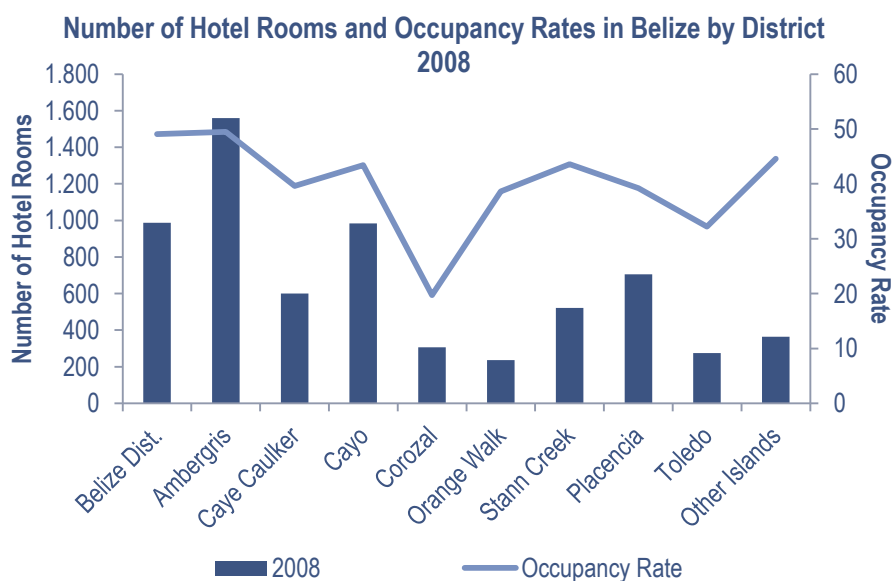
peak periods in February and March. September and October, the months associated with the height of the hurricane season, had the lowest number of overnight visitors.

The overwhelmingly largest inbound market remained the United States with 152,569 overnight visitors to Belize in 2007 representing 60.6% of the market share. Other key markets included Canada (6.6%), Guatemala (5.6%), the United Kingdom (4.0%), Mexico (2.3%) and Germany (1.6%).



Source: VEMS 2007

The most popular destinations for overnight visitors in 2007 were Belize & Ambergris with 70.0% of overnight visitors, followed by Stann Creek (13.9%) and Cayo (11.6%). Ambergris, Belize District and Cayo had the largest number of hotel rooms in 2008. Even with a smaller offering of hotel rooms, the districts of Stann Creek and Orange Walk showed strong occupancy rates while Toledo and Corozal performed the worst in 2008.

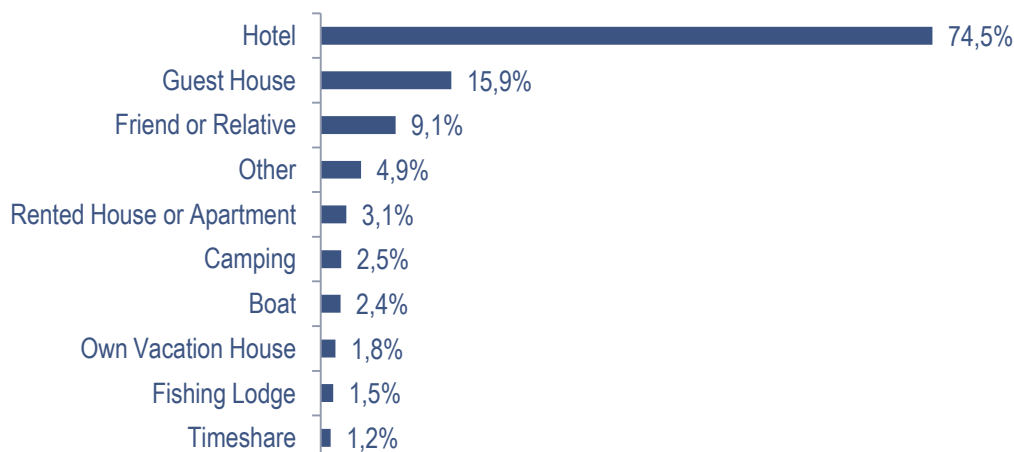


Source: Belize Travel and Tourism Statistics 2008, Table 2.2

Means of Accommodation

Most overnight visitors choose to stay in a hotel (74.5%) while 15.9% stay in guest houses and 9.1% stay with friends or relatives. A small percentage of visitors choose other forms of accommodations such as camping, timeshares, or boats.

Type of tourist accommodation in Belize 2007

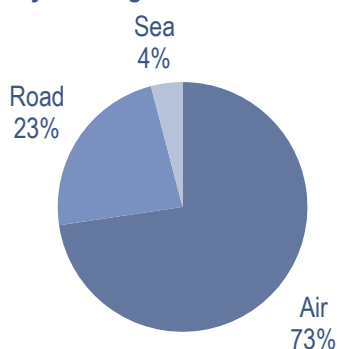


Source: 2007 Visitor Expenditure and Motivation Survey (VEMS)

Means of Transportation

In 2008, the majority of overnight visitors travelled to Belize by air (73%). An additional 23% of visitors travelled by land and 4% by water. Of the air passengers, 41.2% take American Airlines and 31.6% take Continental Airlines. Of the surveyed return visitors, 84.4% had previously travelled by air, while only 4.0% had travelled by cruise ship. This small percentage demonstrates the need to better convert cruise visitors into overnight visitors.

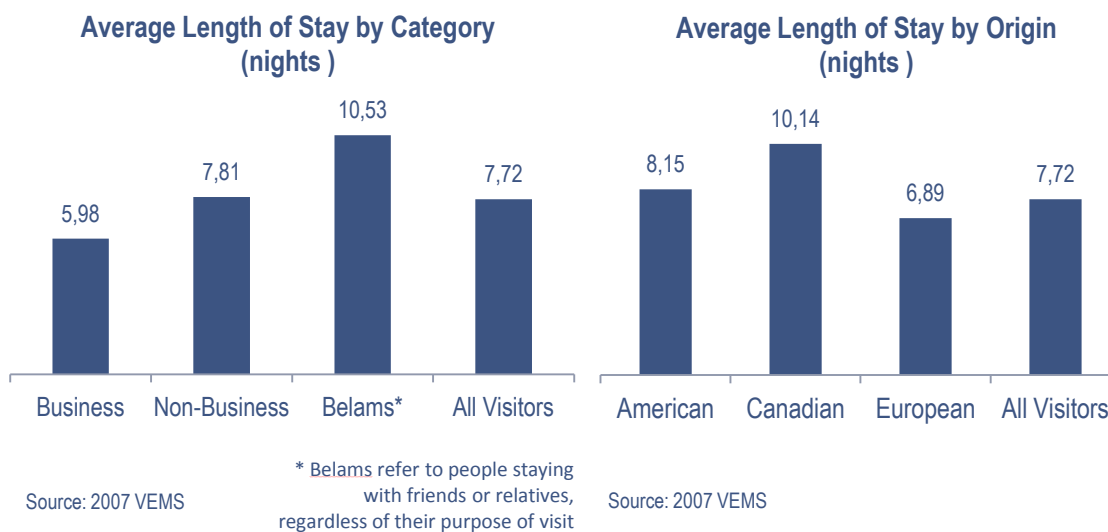
Means of Transportation Used by Overnight Visitors 2008



Source: UNWTO Statistics, Belize: Basic Indicators

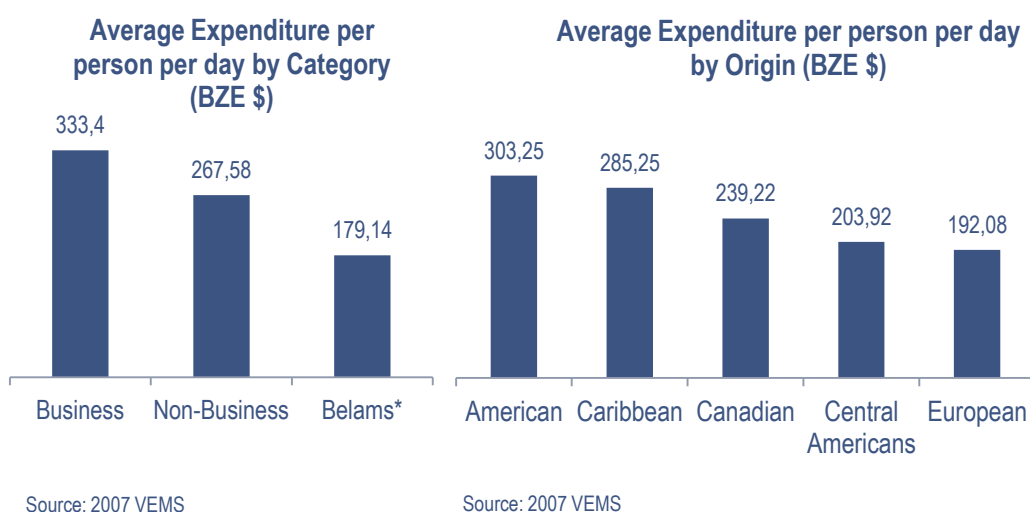
Length of Stay and Visitor Expenditure

The average length of stay (ALOS) for all visitors to Belize was 7.72 nights in 2007. Non-business visitors, the leisure travellers that comprise the largest portion of overnight visitors, stayed on average 7.81 nights. Business visitors typically stayed for shorter periods (5.98) while Belams who do not purchase accommodations stayed for longer (10.53). Of the largest markets, Canadians stayed the longest with an average of 10.14 nights; while Europeans stayed on average 6.89 nights.



Visitor Expenditure

Trip expenditure per day per person was lower for the European markets than for the American and Caribbean markets, which underlies the higher potential for closer markets rather than for the long haul travellers.



Further Findings

- ▶ The average overnight visitor to Belize spends BZE\$ 267 per day. Business visitors spend more than average, as do visitors from the United States. Visitors from Canada spend less than average per day, and Europeans spend the very least (BZE\$ 192).
- ▶ People travelling with their spouse or partner make up the most popular travel group with 32.1%. An additional 30% of visitors travel with a group or friends, 20.7% travel alone, and 14.1% travel as a family. 35% fall in the 20-29 age bracket, 24% in the 30-39 age bracket, and 20% are above 50.
- ▶ 54% of total visitors are men and 46% are women. 47.3% of visitors are professionals and 16.8% are students.
- ▶ The vast majority travel to Belize for leisure (70.6%) while 6% travel for business.

- ▶ The most popular attractions in Belize are the longest reef in the western hemisphere, the Cayes, and the archaeological sites.
- ▶ Tourists to Belize highlighted value for money, transportation, entertainment, and restaurants as the tourist components in need of the most improvement. They cite the Maya sites, marine attractions, and national parks/reserves as the strengths.
- ▶ Most cruise visitors took self guided walking tours of the city. Others participated in visitors to Maya sites, cave tubing, snorkelling, and city tours in a vehicle.

3.2 Projections

It is important to note that although the data analyzed is the most represent available it does not cover the period since and therefore does not include the more recent decline in the tourism industry due to the global economic crisis. The projections reflect an optimistic world economy and should be viewed with that in mind.

Belize has had a steady overall increase in overnight visitors in recent years although the number of day cruise visitors has decreased significantly. However, the tourist expenditure in Belize experienced overall annual growth of 12.8% from 1997 – 2007. This suggests a promising future for Belize's tourism industry up to 2020 relying upon the continued success in terms of annual visitors, length of stay and daily expenditures.

Without master plan implementation			
	Compound Annual Growth	Present (2007)	Future trends (by 2020) Without master plan
Tourist expenditure in Belize	12.8%	BZE\$ 585,3 million	Approx. BZE\$ 2.5 billion
Overnight tourist visitors		251,400	350,000
- United States	3.2%	152,569	240,000
- Europe		34,175	12,000
- Canada		16,655	80,000

These figures correspond to the calculation of projected trends without an effective implementation of a master tourism plan for Belize and will serve as a basis for comparisons between the future without and with prospective impacts from the proposed master plan. The measures for success proposed in the master plan are intended to generate increases in overnight visitors, length of stay, amount of expenditure and overall tourism receipts, while maintaining an emphasis on sustainable tourism.

The potential strategies for increasing overall annual tourist receipts in Belize adopt approaches from different routes to success in the tourism industry. In order to identify the most appropriate and most effective strategy, T&L analysed different scenarios representing the overall changes in tourist receipts resulting from the change in variables per strategy, such as “aggressive promotion”, “quality improvement”, “product development and diversification”, “integral development” and the “focused market strategy”.

Strategy Impact Comparison				
Strategy	Compound Annual Growth	Projected Tourist Receipts 2020 (BZE\$)	Additional Receipts Over Baseline 2020 (BZE\$)	Cumulative Receipts Over Baseline 2007-2020 (BZE\$)
Aggressive Promotion	9.3%	1,850 million	1,189,000	6,816,000
Quality Improvement	8.2%	1,630 million	962,000	9,275,000
Product Development and Diversification	1.4%	703 million	37,500	378,910
Integral Development	19.6%	5,970 million	5,302,000	29,861,000
Focused Markets:				
United States	7.5%	1,490 million	825,460	4,635,000
Europe	3.8%	948 million	281,700	1,440,900
Canada	2.6%	814 million	148,690	701,280

Ultimately, within the available resources, the most effective strategy would be an integral development strategy that seeks to address all components of tourism receipts. With a projected 19.9% annual growth from this strategy, working to increase the volume of visitors, the quality of tourism products, and the availability of diverse activities would do the most to improve Belize as a destination and subsequently bring in the most annual tourist receipts.

4. Tourism Quality and Sustainability Analysis

The scope of the TVC consists of all the services involved in creating the visitor's experience, and describes the general situation of its operators. Therefore, TVC is a transversal value chain where every single chain unit can also be analyzed as part of a separate activity or value chain.

The Tourism Value Chain (TVC) of the tourism activities refers to each stage of the visitor's journey, starting from the booking of the trip to the final range of services that creates the visitor's experience at the destination.

The scope of the value chain consists of all the services involved in creating the visitor's experience, and describes the general situation of its operators.

Travel organization and booking	<ul style="list-style-type: none"> Either in the visitor's home country or in intermediate destinations This value chain unit is the only one operated at the visitor's origin, before starting his trip
Transportation	<ul style="list-style-type: none"> Composed of all means of transport to reach or leave the destination, or to distribute the visitors within the area. This value chain unit operates within the final destination as well as with the visitor's original country
Accommodation	<ul style="list-style-type: none"> In the accommodation value chain in Belize, there are five main types of operators: hotels, resorts, lodges, guesthouses and bed & breakfasts
Food & Beverage	<ul style="list-style-type: none"> Provision of gastronomic products for visitors, mainly in bars & restaurants (in hotels as well as independent businesses) serving both local and international food
Handicraft and souvenir shops	<ul style="list-style-type: none"> Handicraft and Souvenir shops are characterized by selling Belizean music and crafts focused on flora and fauna, landscapes, seascapes and ethnic groups (wood crafts, slate carving, etc.)
Tourism assets	<ul style="list-style-type: none"> Mainly operated by institutions, either public or private, which manage protected areas, reserves, museums, heritage areas, etc.
Leisure activities	<ul style="list-style-type: none"> Tour guides, excursions, shows and events for tourists make up this chain unit

Belize's tourism industry is composed of a great variety of operators with many different transport operators, tourism establishments, restaurants, tourism assets and leisure activities.

Some relevant GAPs have been identified from the TVC analysis in Belize tourism sector:

- ▶ **Transportation:** No good international flight connections to Belize, but good domestic air connections within Belize.
- ▶ **Accommodation:** Lack of quality in tourism services and facilities and lack of international standard hotels. Accommodation facilities are in general small since they are family-run hotels and guesthouses. Big-size hotels are highly concentrated in Belize City, and most other international standard accommodation is concentrating in Ambergris and Placencia.
- ▶ **Food & Beverage:** Lack of international restaurant facilities and small number of good quality establishments.
- ▶ **Handicraft:** Lack of handicraft shops and commercialization of traditional products
- ▶ **Leisure activities:** Lack of leisure activities supply
- ▶ **Tourism assets:** Lack of preservation, use and management of the tourism assets. The number of visits to tourism assets is determined by their accessibility and location, leading to low numbers of tourism visits to some of the most attractive tourism assets, but high in those easily accessible by particularly cruise visitors.

Other GAPs that affect the whole value chain have been identified such as lack of technical skills to service tourists and to meet their expectations

- ▶ The level of linkage within the tourism value chain is low for the following reasons:

- Low levels of cooperation in the fields of activity encourage tourists to increase their activities in the tourism value chain, through such actions as mutual distribution of promotional material or collaboration agreements.
- Lack of awareness in some fields about hosting tourists, mostly in transportation, food and beverage and handicrafts; these fields host mainly local guests and a low rate of tourists, consequently they are not involved in the tourism industry and they have low cooperation with the other tourism fields of activity such as accommodation, leisure activities and tourism assets.

4.1 Sustainable tourism issues

The social-cultural and environmental assessments will analyse the destinations' environmental and social components to identify measures for safeguarding of cultural and natural assets of Belize. These assessments provide a baseline for the rest of the project and tasks coming up.

4.1.1 Environmental assessment

From a detail environmental assessment of each district that was undertaken within the project, the most relevant gaps Belizean districts are experiencing are:

Belize City

- ▶ The largest environmental challenge facing the city is that of solid waste management. Improperly stored garbage and illicit dump sites throughout the city are eyesores and have often drawn negative comments by visitors.

Ambergris

- ▶ Dredging on the windward coast is supposedly severely restricted because of the potential impacts this activity could have on the reef system, but it continues to be a huge problem. The wave action caused by the increased depth of shoreline water due to illegal dredging can severely erode the nearby coastline especially during tropical storms and hurricanes.
- ▶ Beach erosion, although a natural phenomena, has accelerated in recent time and is attributable to numerous causes —mainly those of man's activities in various forms such as the clearance of mangroves, the reclamation of land from the sea, seawalls, the construction of piers, and the dredging of sand offshore, all of which affect the littoral drift and the consequent shift and deposition of sand.
- ▶ Mangroves can be considered as one of the most important ecosystems on Ambergris Caye for several reasons. Despite the significant importance that mangroves have on the environment, they are rapidly being cleared to make way for new mega - developments. Sea walls are often put up in their absence, in an attempt to prevent erosion, but with little effect.
- ▶ A UNESCO report raised special concern on the Bacalar Chico Marine by stating it is "poorly protected and that there is no clear recognition and understanding of the management implications... and should be considered for immediate inscription on the list of World Heritage in Danger".

Placencia

- ▶ Placencia's development is not presently guided by any zoning plan or master plan.

- ▶ Waste water discharge and the potential for pollution of the recreational waters and the Placencia Lagoon is a major issue to be considered as part of the future development of the area.
- ▶ The improper disposal of solid waste can have negative impacts to surrounding Caribbean Sea and the recreational waters of Placencia. Many substances in common domestic waste have the potential to negatively affect the environment because of their chemical properties.
- ▶ Beach erosion as a result of coastal structures and developments is always a major issue to consider in Placencia.
- ▶ The clearance of mangroves on the lagoon side and their reclamation with material from the lagoon to allow for developments has raised concerns among some of the NGOs and more vocal elements of the society. Some are concerned on the impacts these activities are having on manatee populations that visit the lagoon.
- ▶ Dangriga has no centralized sewage collection and treatment system. Domestic waste water is treated by means of traditional septic tanks and soak-aways. In certain instances grey water is discharged directly into public drains.
- ▶ Solid waste management and the control of littering is one of the major challenges facing Dangriga.

Cayo

- ▶ San Ignacio, as is the case of other towns, does not have a centralized sewer system. All domestic waste water is discharged into septic tanks and soaks ways.
- ▶ The towns of San Ignacio and Santa Elena have made significant effort to address issues associated with littering. However, there remain hot spots, primarily in open lots that are being used as illicit dumpsites.
- ▶ The burning of garbage as a means of management of the dumpsite has become an environmental health concern.

Corozal

- ▶ There is no separation of the solid waste. Garbage burning is also common, but because the dumpsite is away from any populated area, environmental health concern is not considered a priority.
- ▶ It should be noted that with the advent of “disposable plastic containers” there has been an increase in road side littering.
- ▶ The town is not serviced by a sewage system and depends on individual cement septic tanks and soak-away pits or leach-fields. Grey water is often discharged into the soak ways with some discharging occurring directly into open drains. The concern has always been ground water contamination due to the porous limestone base.

Orange Walk

- ▶ Environmental issues are key elements to be considered, since the most visited cultural attractions of Orange Walk by cruise tourists are already taking the risk of serious deterioration
- ▶ Many illegal dump sites outside the town’s boundaries that may be due to lack of a vehicle to get to the town dump, lack of civic pride, or lack of collection service.

- ▶ Liquid waste disposal is unregulated and consists of septic tanks and some pit latrines in the outskirts of town.
- ▶ The industry discharges its liquid waste into a leach field area which eventually discharges into the river.
- ▶ There have also been several instances of fish kill in the New River; the real causes have been attributed to several environmental factors in which liquid waste pollution may have played a role.
- ▶ In both the solid and liquid waste problems faced by the town, it could be argued that lack of planning and management led to poor siting of housing and on-site waste treatment systems, such as development in flood-prone areas.

Punta Gorda

- ▶ The garbage is not being crushed/compacted before deposited at the dump site and due to this practice and high rainfall PG has one of the highest incidences of mosquito infestation and by extension a high possibility of increase in malaria and dengue cases.
- ▶ Like the rest of the other towns, PG is not serviced by a sewage system and depends on individual cement septic tanks and soak-away pits or leach-fields. Grey water is often discharged into the soak-aways with some discharging occurring directly into open drains. The concern has always been ground water contamination and the bay.
- ▶ Another phenomenon affecting PG is the washing up on their coastline during heavy rains of tons of garbage.

Major environmental threats and considerations the industry should highly consider are:

Cruise Ship Tourism

A major challenge to the tourism sector is posed by the explosive expansion of the cruise ship industry in Belize. It is estimated that current tourist arrival figures of 800,000 tourists (mainly cruise ship passengers) generate close to 7 per cent of the total solid waste generated in all of Belize. This estimation illustrates just one dimension of the country's vulnerability to mass tourism.

Another area of concern has been the mass visitation of cruise ship tourist to reefs, protected areas and archaeological sites perhaps surpassing the carrying capacities of several of these sites. A study conducted by INCAE provides indications of environmental damage by cruise tourism, especially to the marine areas visited.

Vulnerability to Natural Hazards and Climate Change

Belize has over the past years experienced the effect of several hurricanes, storms and flooding. Its vulnerability comes from the increased risks associated with the increase in frequency and intensity of tropical storms and hurricanes predicted as a result of climate change. In addition, rising sea levels pose risks for flooding, inundation, saltwater intrusion, and erosion, which threaten water supplies, infrastructure, and coastal areas. Warmer sea water threatens the coral reefs along the coast of Belize that comprise the longest barrier reef in the western hemisphere and attract thousands of tourists for recreational activities.

Offshore Petroleum Exploration and Other Developments

Recently much concern has been expressed by members of the Belize Tourism Industry Association on the licenses issued by GOB for offshore oil exploration. This concern follows the incident involving BP's Gulf of Mexico oil spill. Much concern has focused on the devastating impacts an oil spill could have on Belize's very sensitive marine ecosystem whereby it would destroy the tourism and fishing industry and by extension the entire Belizean Economy. Concerns have been expressed on our institutional weaknesses to monitor the industry properly to ensure that the companies comply with the highest international standards required of the industry.

Increasing Level of Poverty and Economic Recession

With a recent poverty level of 43% and a slow economic growth rate while experiencing a population growth rate approaching 3.7% per annum, there is a serious need for action to be taken to ensure economic growth and the creation of employment opportunities. At a time when the country faces increased environmental degradation primarily associated with the expansion of agriculture, housing and tourism, the current economic situation poses even greater challenges in maintaining a healthy environmental and natural resource base. In a country with high poverty levels, and relative natural resource abundance, **environmental degradation and human deprivation are closely linked.**

4.1.2 Socio-cultural assessment

Approximately 350,000 people live in Belize, whereby 29% live in Belize District. About the half of the population live in two cities and seven towns, and the other half lives in rural areas. Belize has a large range of ethnic groups: Mestizo 48.7%, Creole 24.9%, Maya 10.6%, Garifuna 6.1%, other 9.7% (in 2000) and religions: Roman Catholic 49.6%, Protestant 27% (Pentecostal 7.4%, Anglican 5.3%, Seventh-Day Adventist 5.2%, Mennonite 4.1%, Methodist 3.5%, Jehovah's Witnesses 1.5%), other 14%, none 9.4% (2000). Its social diversity means that it is a multi-language destination mainly speaking Spanish, Creole and Mayan dialects.

To take socio-cultural aspects into account, or to be applicable in a tourism development and master planning process, the following specific areas were analysed: San Ignacio, Belize City, Ambergris Caye and Placencia.

San Ignacio Town

In San Ignacio, the level of community spirit and cohesion is very good in relation to its support for the tourist industry. This is mainly due to the municipality (along with the surrounding rural communities) and the path over the last two decades to move towards the development and promotion of eco-tourism which has now become one of the mainstays of the local economy and a major source of employment opportunity for the local population. San Ignacio has a very cosmopolitan population which promotes the Mestizo, Creole and Maya cultures in all its forms: eg food, festivals, music etc.

Belize City

There is significant support to the tourist industry by the local population of Belize City. It is one of the main sources of employment for a wide range of businesses particularly the small business people selling their crafts, food, or engaged in the provision of services including tour-guide and taxi services.

One major concern of the city is a relative high level of criminality. The level of homicide and burglaries has shown a steady increase over the past 4 to 5 years with the bulk concentrated in the south-side constituencies. Belize City has the highest

crime rates among the seven municipalities in the country (while it is highest in Belize City this is an issue for the entire country, especially where tourism is involved).

Ambergris Caye

The native population of Ambergris Caye is primarily comprised of Mestizo along with small representations of all the other ethnic groups in the country including the Creole, Garifuna, Maya and others. The bulk of the population is concentrated primarily in and around the town of San Pedro located near the southern coast. Local home owners have developed a fairly successful hotel/motel industry based on the development and expansion of their homes to accommodate over-night tourists. Transporting visitors to and from the island has become a lucrative business for local residents.

The community spirit and cohesion on this island is very strong particularly as it relates to the tourist industry since this industry has now become the “back-bone” of its economy. As mentioned above, the shift from depending primarily on fishing to tourism has been gradual over the past two decades, but has resulted in marked improvement in the quality of life for its residents. In addition, there was a recent controversy in the community sparked by a sharp increase in the incidence of crime on the island, and which resulted in allegations of racism being practiced by the local authorities of the Town Council through the use of racial profiling.

Placencia

The local population mainly comprises a mixture of Mestizo and Creole with small representations from all the other ethnic groups in the country such as the Garifuna, Maya, East Indians, and Asians etc.

The level of community spirit and cohesion seem to be very strong particularly in relation to the tourist industry which has now become the mainstay of the local economy. Local population is engaged in various aspects of the tourist industry such as tour-guides, restaurants, diving instructors, craft vendors, small hotel operators, etc. A major concern of Placencia is the issue of sexual exploitation and illegal trafficking of women and under-aged girls to these destinations from neighbouring countries

The neighbouring provinces are rich in cultural resources of Garifuna and Maya communities of Seine Bight, Maya Centre, Santa Rosa and San Roman each with their distinctive cultures which are attractive to tourists. It should be noted that these communities still practice their customs and traditions.

4.2 Competitiveness analysis

This section identifies critical intervention areas for the improvement and enhancement of Belize’s tourism sector competitiveness.

In order to understand and analyse Belize’s competitiveness compared to its competitors, four broad categories were considered – the regulatory framework, business environment & infrastructure, resources and tourism commercialisation - with various sub-indexes. The market competitiveness analysis calculates specific indicator variables and provides the Country Competitiveness Index (CCI), which makes a comparison between competing destinations possible.

When Belize’s CCI > 1 → stronger When Belize’s CCI = 1 → equal When Belize’s CCI < 1 → weaker

²Thus a CCI higher than 1 in a given area means that Belize is strong in that area while a CCI below 1 identifies an area of weaknesses which requires improvements.

Regulatory and Institutional Indicators

Regulations and institutional frameworks are crucial as they ensure the enforcement and maintenance of a desirable tourism destination.

Compared to the competing countries, Belize:

- ▶ Lags behind in investment level and ease of starting a business
- ▶ Has significantly higher per capita CO₂ emissions, but a lower number of endangered species, although it also has a lower quantity of species overall
- ▶ Remains relatively on par in terms of health and hygiene

Policy & Regulation						
	Belize	Costa Rica	Guatemala	Nicaragua	Panama	Belize CCI
Foreign Direct Investment 2006 (% GDP)	6.01	6.61	1.00	5.33	15.06	0.86
Time Required to Start a Business 2008 (days)	44	60	26	39	12	0.78*
Environmental Sustainability						
	Belize	Costa Rica	Guatemala	Nicaragua	Panama	Belize CCI
Per capita CO ₂ emissions 2006 (metric tons of carbon)	2.84	1.93	0.96	0.78	2.01	0.50*
Number of Endangered Species 2010	89	256	233	115	329	2.62*
Health & Hygiene						
	Belize	Costa Rica	Guatemala	Nicaragua	Panama	Belize CCI
Physicians 2000-2007 (per 10,000 population)	11	13	9	4	15	1.07
Hospital Beds 2000-2008 (per 10,000 population)	12	13	7	10	22	0.92
Population With Access to Improved WaterSources 2006 (%)	91	98	96	79	92	1.00

Business environment & infrastructure indicators

Compared to the competing countries, Belize:

- ▶ Falls short in terms of its road infrastructure
- ▶ Has moderate communication infrastructures
- ▶ Shows an incredibly high percentage of capital investment in tourism, but still falls very short in the number of hotels

Transportation Infrastructure						
	Belize	Costa Rica	Guatemala	Nicaragua	Panama	Belize CCI
Roads Paved 2000 (%)	17	22	34.5	11.1	34.6	0.67
Communication Infrastructure						
	Belize	Costa Rica	Guatemala	Nicaragua	Panama	Belize CCI

² Note: It is important to recognize through all of these competitiveness ratings that Belize faces a vast disadvantage in comparison with Costa Rica, Guatemala, Nicaragua, and Panama since it is a much smaller and less populated country. In fact, the computed CCI for each of these variables shows that Belize has a competitiveness index in land mass of 0.25 and a competitiveness index in population of 0.05. Low competitive ratings in the variables analyzed should be viewed with these disadvantages in mind.

Cellular subscribers 2007 (per 100 population)	41.12	33.76	76.01	37.88	90.05	0.69
Internet Users 2006 (per 100 population)	10.91	27.61	10.22	2.77	17.35	0.75
Telephone Lines 2006 (per 100 population)	12.48	30.22	10.49	4.43	14.85	0.83
Tourism Infrastructure						
	Belize	Costa Rica	Guatemala	Nicaragua	Panama	Belize CCI
Share of Capital Investment in Tourism 2009 (as a % of total fixed investment)	26.2	13.5	9.4	6.8	13.7	2.41
Absolute Capital Investment in Tourism 2009 (US\$ billion)	0.08	0.95	0.593	0.128	0.87	0.13
Number of Hotels 20087	620	2599	2640	503	462	0.40

Resources Indicators

Compared to the competing countries, Belize...

- ▶ Employs a relatively high percentage of its work force in the travel and tourism industry, but has room for improvement with its literacy rates and national unemployment
- ▶ Currently does not host an UNESCO cultural world heritage site
- ▶ Has a larger number of known mammal species
- ▶ Has fewer protected marine areas,
- ▶ Has a smaller number of known plant species
- ▶ Offers fewer UNESCO Natural Heritage sites

Human Resources						
	Belize	Costa Rica	Guatemala	Nicaragua	Panama	Belize CCI
Travel & Tourism Employment 2009 (% work force)	28.8	14	6.8	6.1	13.1	2.88
Travel Agents 2009	192	366	678	22	219	0.60
Life Expectancy at Birth 2009 (years)	73	79	70	71	75	0.99
Unemployment Rate (most recent data)	8.50%	5.60%	3.20%	3.90%	6.30%	0.56*
Primary School Completion Rate 2007 (%)	103.6	89.1	76.5	73.4	94.5	1.24
Secondary School Net Enrolment 2006 (%)	67	64	38	43	64	1.28
Adult Literacy Rate (%)	70.3	95.9	73.2	78.0	93.4	0.83
Resources Indicators- Cultural Resources						
	Belize	Costa Rica	Guatemala	Nicaragua	Panama	Belize CCI
World Heritage Cultural Sites 2010	0	0	2	1	2	0.00
Resources Indicators- Natural Resources						
	Belize	Costa Rica	Guatemala	Nicaragua	Panama	Belize CCI
Marine Areas Protected 2008 (sq km)	2409	3067	338	4479	6275	0.68
World Heritage Natural Sites 2010	1	3	1	0	3	0.57
Number of Known Mammal Species 2004	633	477	594	777	483	1.09
Number of Known Plant Species 2004	2,894	12,119	8,681	7,590	9,915	0.30

Tourism commercialization indicators

Compared to the competing countries, Belize:

- ▶ Lacks competitiveness in terms of visitor numbers and receipts
- ▶ Invests an extensive amount of its funds and resources in the tourism industry

Strength of Tourism Industry

Executive Summary · Diagnostic of the Tourism Sector in Belize

	Belize	Costa Rica	Guatemala	Nicaragua	Panama	Belize CCI
Overnight Visitor Arrivals 2009 ('000)	229.8	1917.3	1522.1	931.5	1250.5	0.16
All International Arrivals 2009 ('000)	934.9	2228.4	1683.6	1189.5	1576.9	0.56
Tourism Receipts 2009 (US\$ million)	177.7	1,977.8	1,298.0	345.9	2,269.0	0.12
Government Support						
	Belize	Costa Rica	Guatemala	Nicaragua	Panama	Belize CCI
Government Tourism Expenditure 2009 (US\$ billion)	0.03	0.295	0.163	0.03	0.13	0.19
Government Tourism Expenditure 2009 (% Total Spending)	12.3	6.1	4.6	2.1	4.8	2.80

Based on the CCI approach, the following strengths and weaknesses can be defined:

▶ **Strengths**

- Tourism government expenditure
- Percentage of labour force employed within tourism
- Capital investment in tourism

▶ **Weaknesses**

- A high unemployment rate
- High CO2 emissions per capita
- Low market share of visitor arrivals
- Weak level of marketing and commercialisation

Overall, Belize's Average Comparative Competitiveness Index was 0.91, putting it only slightly behind its competitors. In light of its relative size and population, Belize's competitiveness score demonstrates an immense amount of potential for the competitiveness of its tourism industry.

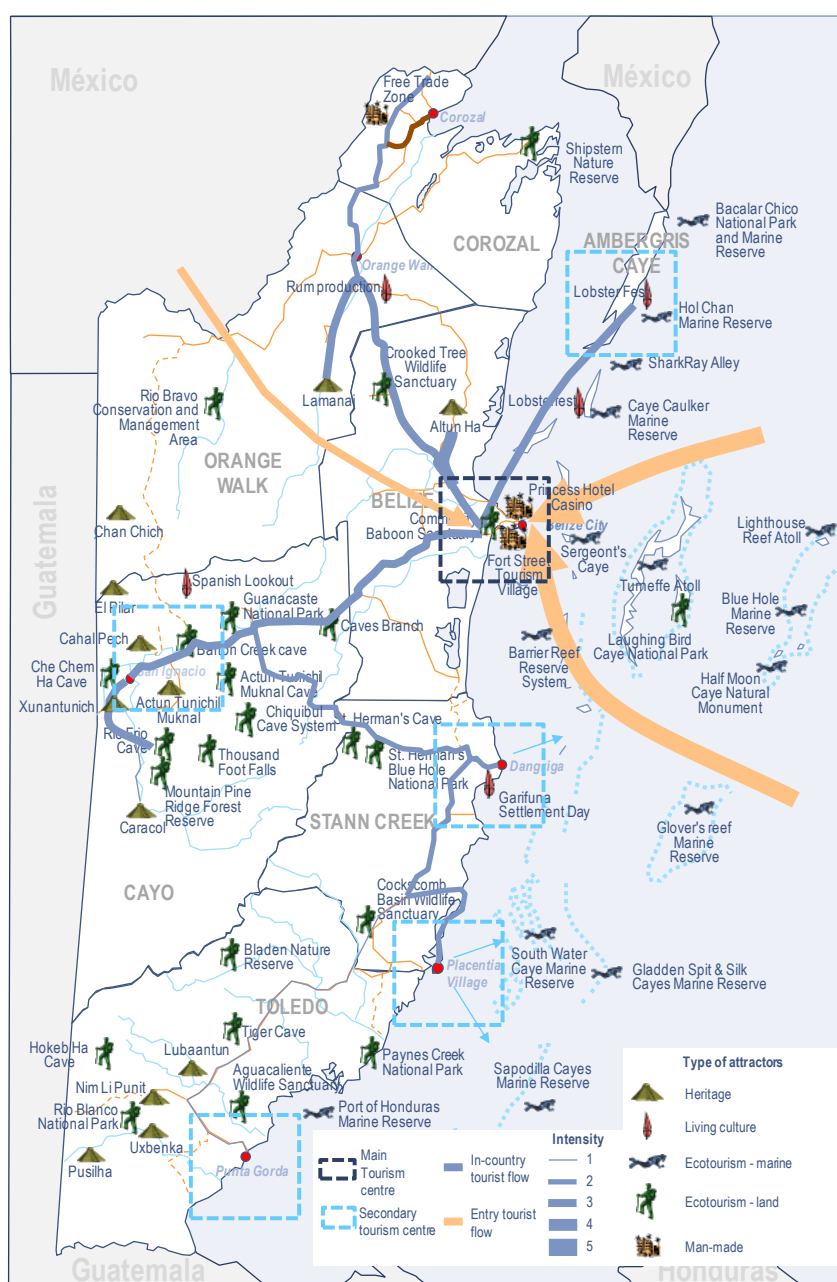
5. Tourism Destination and Infrastructure Analysis

5.1 Belize tourism destination structure

Belize's structure as a tourism destination has one main centre or hub where most tourists reach before getting to other destinations within Belize. Those destinations acting as secondary tourism centres are Ambergris, San Ignacio, Placencia and at a lower grade Punta Gorda and Dangriga.

As the map below is presenting, inbound tourism flows arriving to Belize City are mostly by cruise or by air. The most visited destinations in Belize that receive both cruise visitors and overnight tourists are North Belize City, Ambergris and Cayo.

All other destinations cater basically overnight tourists and do not receive cruise visitors since they are too far to be reached in one day, such as Placencia, Dangriga and Punta Gorda.



Belize District

Belize district pulsates with an infused mix of old-world charm and modern comfort including relevant tourism assets such as the Maya temples of Altun Ha; the magnificent Jabiru storks at Crooked Tree Wildlife Sanctuary.

Belize City is best known as the cultural and business epicentre of Belize, as well as a doorway for cruise passengers to the country's offering of diverse adventures. Belize City offers a variety of cultural and historical centres, colonial architecture and excursions. It is also the commercial centre of the country where the country's largest hotels are found offering conference facilities, professional services, as well as restaurants, bars and nightlife.

Belize district in terms of tourism is characterized by the following features:

- ▶ Belize City tourism facilities (hotels, restaurants, bars, nightlife, etc.) are limited and lack the required quality considering the fact it is the largest city in the country and the main arrival and departure point for tourists.
- ▶ Non-existence of proper leisure services in Belize City, such as shopping malls, entertainment complexes, theme parks, etc. that would clearly diversify tourism supply in Belize especially for cruise visitors. Lack of designated anchorage sites and inadequate city cruise tourism infrastructure.
- ▶ Belize City is deprived of green areas and has very limited recreational areas. Parks and public open spaces are relatively small and lack adequate amenities.
- ▶ Lack of organization concerning vehicular and pedestrian circulation leading to conflicts and making pedestrians feeling uncomfortable.
- ▶ Land connectivity is in general good on primary roads, but secondary roads lack quality and these are the roads usually taken to the district's tourism assets.
- ▶ The impact of cruise tourism on Belize district heritage sites, which is gradually changing the characteristics of visits to popular cruise tourism sites from cultural experiences to mass tourism experiences.

Ambergris

At 36 miles long, Ambergris is the largest of the cayes in Belize. Located in the northern-most waters of the country, three-quarters of a mile west of the Belize Barrier Reef, the island is surrounded by prominent dive and snorkel sites, including the Hol Chan Marine Reserve and Shark Ray Alley. San Pedro, the main city of Ambergris, is an historic city with a blend of restaurants, shops, bars, boutique hotels, and condominium complexes and at the same time the busiest visitor destination in Belize. However, it retains its relaxed atmosphere and is far from the glitz and noise of a city.

A few miles from Ambergris, Caye Caulker offers a range of accommodation from budget-friendly hotels to small full-service resorts, along with excursions for all types of vacationers.

Ambergris is characterized by the following features:

- ▶ The increased population of San Pedro, as well as the increasing number of tourists, has caused the environment in and around Ambergris Caye to be increasingly impacted by pollution.
- ▶ Poor road conditions continue to be of great concern to the residents and tourists of Ambergris Caye.

- ▶ Reliance upon golf carts and pedestrian circulation lacking in organization. Further control is required of bigger vehicles which are now starting to dominate the streets.
- ▶ Low cost housing, environmentally destructive dredge and fill areas still underway, and the general lack of visual interest on the bay have kept that side of town depressed.
- ▶ The landscape of the island is gradually being transformed, due to the fact that higher intensity development (G+2 and taller structures) has been produced throughout the island, and it has not been kept in defined zones.
- ▶ The windward coast of Ambergris Caye is clustered with piers and jetties that are used for loading and unloading purposes which increase vulnerability to serious beach erosion, navigational safety hazards, fire peril, and visual pollution of the island frontage, not to mention the obstruction of public use of the beach.
- ▶ Infrastructure problems of paving drainage, water supply and wastewater treatment
- ▶ Fresh groundwater on Ambergris Caye is limited to a thin water lens that is perched atop the saline water level.

San Ignacio / Cayo

San Ignacio is a vibrant, interior town that serves tourists as an attraction in itself, as well as a base camp for visits to the surrounding antiquities and natural areas. The scale of the downtown area and the historic character of much of the architecture reinforce the attractiveness of the town for tourism. The town serves as a base from which to explore pine forests, clear rivers, rocky plateaus, ceremonial caves, towering mountains, cascading waterfalls and ancient Maya temples. Throughout the countryside there are accommodation options ranging from elegant jungle lodges through to the more basic amenities of a small resort or campsite.

San Ignacio/ Cayo are characterized by the following features:

- ▶ There is a serious need to remedy the open and inadequate storm drainage system complicated by the (pleasantly) varied topography.
- ▶ Lack of public spaces where leisure activities such as restaurants, bars and special events could take place. Strong need to develop entertainment and leisure services.
- ▶ Lack of a tourism visitor centre in San Ignacio where tourists could get information and data about tourism products and packages to main Cayo assets.
- ▶ Lack of a good road network facilitating access to main tourism sites, and particularly nature and culture assets (i.e. Caracol)
- ▶ Only part of the cultural heritage in Cayo is open to tourism since most of it still remains covered and unexcavated.
- ▶ Certain grade of insecurity on the access to Caracol ruins due to the proximity of the Guatemalan border.
- ▶ Even though an air strip is available, Cayo lacks air connectivity within the country and from other relevant Maya sites within the region.

Placencia / Stann Creek

Situated on a slender peninsula that curves alongside the southern coast of the country, Placencia is the only place on mainland Belize that offers white sand beaches.

There are many full service, up-market hotels, private homes and condominiums with a range of services including spas, marinas and fine dining as well as tours for diving,

snorkelling, fishing, archaeological, cultural and rainforest experiences. Unlike Ambergris, this coast line is not heavily populated by docks and piers. Water quality of the sea is generally good, but sensitive to wave action and sedimentation.

Most of this land is low in elevation, and development of any intensity will require mitigation of environmental conditions and potential destruction of mangrove areas.

The Placencia Peninsula is on the verge of the most significant changes in its history. At the north end there is a new airport under construction, which can handle intercontinental passenger jets. A resort development designed to American standards by Americans is under construction, and this is the highest intensity development in Belize.

Placencia/ Stan Creek are characterized by the following features:

- ▶ Lack of Proper Planning since Placencia's development is not presently guided by any zoning plan or master plan. Environmental concerns are raised when looking at the strong development Placencia is and could be suffering.
- ▶ Lack of proper quality of the tourism facilities located in Placencia Village
- ▶ Beach erosion as a result of coastal structures and developments is always a major issue to consider in Placencia
- ▶ Even though the road has been upgraded recently, there is an under capacity of bridges on the road accessing the Peninsula from Belmopan. Frequent heavy rains during the rainy season produce flooding that hinder the use of bridges by circulating vehicles.
- ▶ Insufficient basic infrastructures to cover current and potential demand, and not enough capacity of energy and water supply services
- ▶ Dangriga provides easy access to many of the beautiful cayes of the south and has ready access to some of the most relevant protected areas like the Blue Hole National Park and Saint Herman's Cave.
- ▶ Dangriga has no centralized sewage collection and treatment system. Domestic waste water is treated by means of traditional septic tanks and soak-aways.

Punta Gorda/ Toledo

Toledo, 150 miles by road from the capital, Belmopan, is the southernmost administrative district of Belize. Peopled predominantly by indigenous Maya, it has a low population density and settlement patterns. Punta Gorda Town, known locally as P.G., has a population of 5,500 with a mixture of Mopan and Kekchi Maya, Garifuna, Creoles, Lebanese, East Indian and Chinese peoples.

Toledo is itself an emerging destination within Belize and it is home to Belize's only true rainforest coupled with intricate caves, incredible wildlife and some of the most beautiful offshore islands found in Belize.

Toledo/ Punta Gorda is characterized by the following features:

- ▶ Toledo offers an insufficient tourism supply concentrated basically in Punta Gorda and on some resorts throughout the district;
- ▶ Toledo's facilities provide a limited provision of services and are suffering of daily change opening hours without previous notice. In that particular case, there is a lack of tourism/ handicraft shops
- ▶ There is a lack of quality and standards at hotels, except in some particular cases; HR do not cover the grade of service required.

- ▶ Punta Gorda lacks of the charm and beauty a coastal town should have
- ▶ Toledo's connectivity is clearly an issue that needs to be solved since paved roads only reaches Punta Gorda, but all tourism assets need quite a long time to be reached by vehicle due to the bad conditions of Toledo's roads.

Orange Walk

Orange Walk district is home to approximately 16,000 people, primarily descendants of the Mestizo culture, descendants of the Spanish-Maya refugees of the Caste Wars

As the sweet smell of sugarcane permeates the air in the Orange Walk district, the grand Maya temples, primal jungle and exotic birds entice one to explore.

Orange Walk is characterized by the following features:

- ▶ Accessibility to temples remains the main issue to be solved in the following years. Lamanai is presently accessible by boat and vehicle; but while road accessibility is long and uncomfortable, travelling by boat is a fascinating and enriching nature experience.
- ▶ The impact of cruise tourism on Orange Walk cultural sites (Lamanai), which is gradually changing the characteristics of visits to popular cruise tourism sites from cultural experiences to mass tourism experiences.
- ▶ Environmental and social issues are also key elements to be considered along rich cultural assets, since the most visited cultural attractions mainly by cruise tourists are already at risk of serious deterioration.

Corozal

Perched on the northern border with Mexico, picturesque Corozal district blends Mestizo, Maya and Mexican flavours with the allure of a serene haven away from the busier tourist track. Corozal district is also home to the Corozal Free Zone with a hotel, casino and shopping. Charming resorts, comfortable homes and shady parks overlook the inviting waters. Visitors and retirees from Europe and North America mix easily with more deeply rooted locals.

Corozal is characterized by the following features:

- ▶ The Corozal Bay covers 730.5 km² and was declared a Wildlife Sanctuary in 1998 for its biodiversity and its healthy population of manatees.
- ▶ Corozal has limited number of tourism assets which are mainly a few nature reserves and several minor Maya temples. However, Corozal's location is extremely privileged since it is located at 1-hour water taxi to Ambergris Cayes, which means it is closer than Belize City.
- ▶ Corozal town has direct ferry connection to Ambergris and thus it could be northern entrance gate to the Cayes. However, a direct ferry connection to Ambergris from Chetumal, the closest city in the Mexican side, is hindering Corozal to be a connecting point to the Cayes. Therefore, tourists remain and take the ferry in Chetumal instead of heading to Corozal.
- ▶ Although the town's sea shore does not have sandy beaches, there are several public areas such as "Miami Beach" where visitors can take a swim, have a picnic, or simply relax.
- ▶ The town has designated parks and public open spaces but lack adequate tourism amenities.

- ▶ The town is not serviced by a sewage system and depends on individual cement septic tanks and soak-away pits or leach-fields.

5.2 Infrastructure and transportation analysis

Air connectivity

Air connections are a critical factor for the development of a tourism destination in order to be accessible to the source tourism markets. Currently, Belize has one international airport with a reduced passenger terminal. Flights are presently being operated to the United States and some neighbouring countries such as Guatemala, Honduras and El Salvador.

Some issues regarding Belize's air connectivity and airport facilities should be particularly highlighted:

- ▶ There is an alarming lack of direct connections to Europe and Central America, but also to South America.
- ▶ Belize International Airport, and particularly the passenger terminal facilities, are old and reduced not fulfilling the required international standards to receive tourists. Not enough services are being offered within the passenger terminal, and those given lack the required quality.

A new international airport developed by private stakeholders is under construction in the southern part of the country in Placencia. That new airport could be fostering the tourism sector in the southern part, by promoting destinations such as Dangriga, Punta Gorda and Placencia itself.



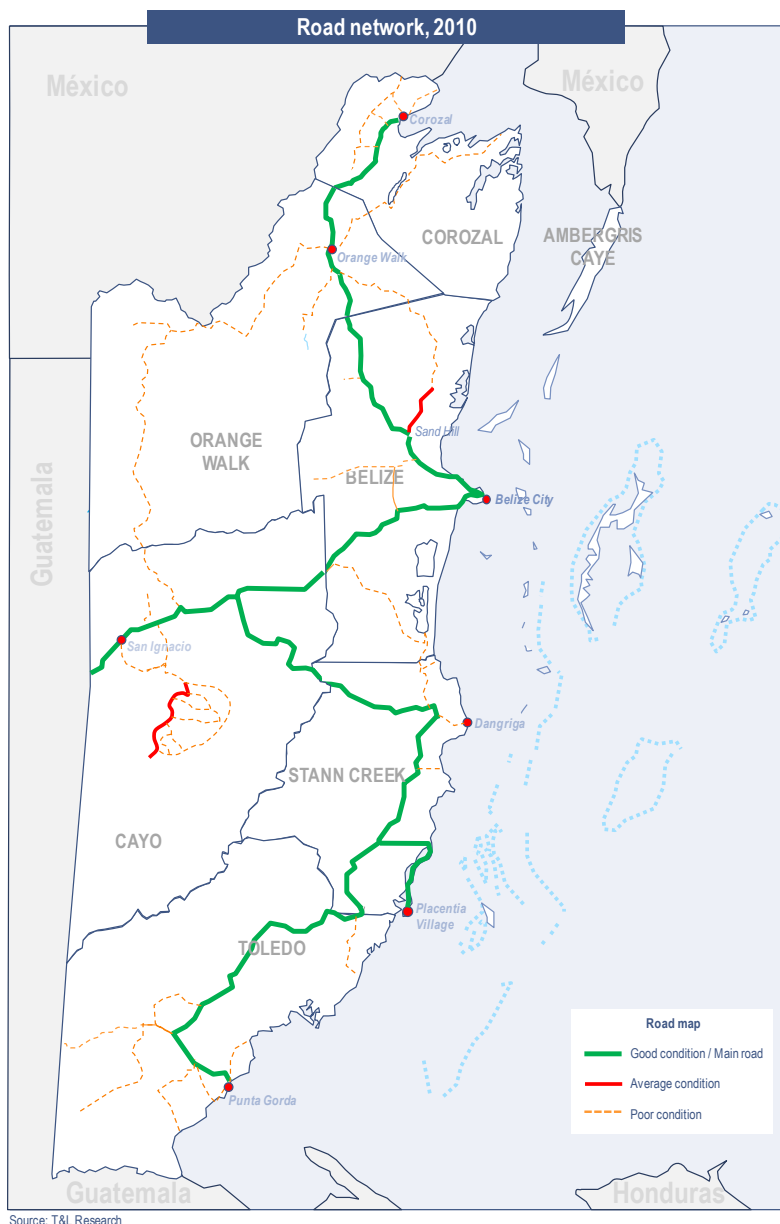
Land connectivity

Currently, the main road of Belize crosses from North to South connecting with the main cities of Belize. However, connections to certain tourist attractions are only accessible through secondary roads which are mostly not paved requiring a high level of maintenance and improvement.

Some of these challenges are mainly focused on the following issues:

- ▶ Inappropriately surfaced roads leading to floods risk
- ▶ Carrying capacity for all types of transportation
- ▶ Insufficient and inappropriate signage along the routes
- ▶ Lack of physical planning in particular in rural communities in and around tourism sites and destinations

Under these lines, road conditions in Belize require further improvement and maintenance in specific stretches. On a general point of view, road maintenance is recommended for all roads with the aim to improve or maintain conditions and security.

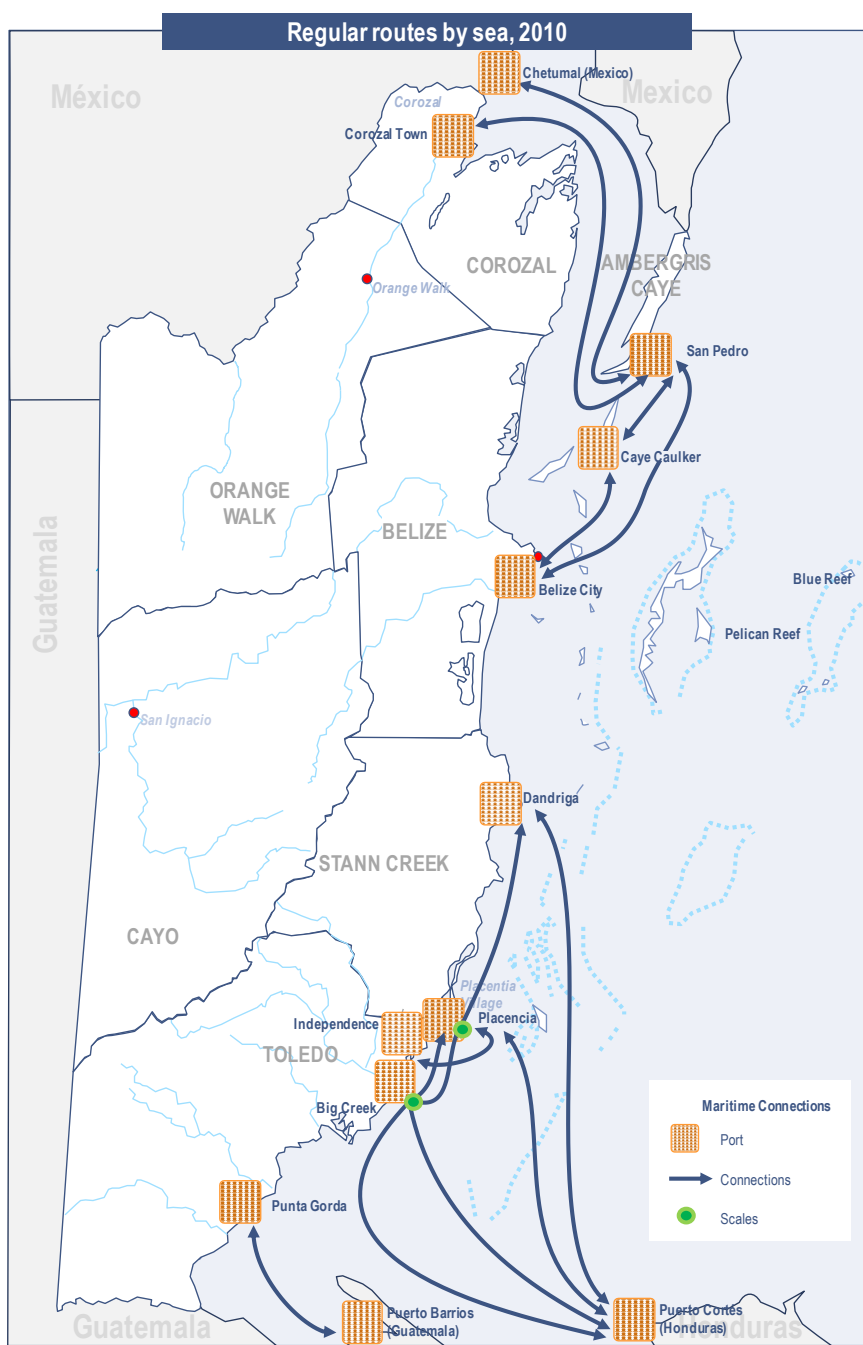


Sea connectivity

Regular routes by sea in Belize connect the main coastal cities and islands both by ferries and water taxis. Also, there are daily regular routes connecting San Pedro with the Blue Reef and the Pelican Reef. At an international level, there are also come routes that connect Belize's main cities with the neighbouring ports of Puerto Cortés in Honduras, Puerto Barrios in Guatemala and Chetumal in Mexico.

Some of the constraints that need to be faced concerning sea connectivity are:

- ▶ No regular routes connecting northern cities to southern cities of Belize
- ▶ Quality on maritime transport should be improved mainly focusing on safety, schedule performance of ferries and ports services and facilities



6. Tourism Product Analysis

The Tourism Product Analysis will identify tourism assets, facilities and services offered in Belize and assess their tourism potential and attractiveness. The tourism facilities and services are analysed by applying the Tourism Value Chain Analysis, which offers a structured analysis format. The assessment of relevant tourism attractions will be the basis for defining Belize's sustainable tourism development strategies.

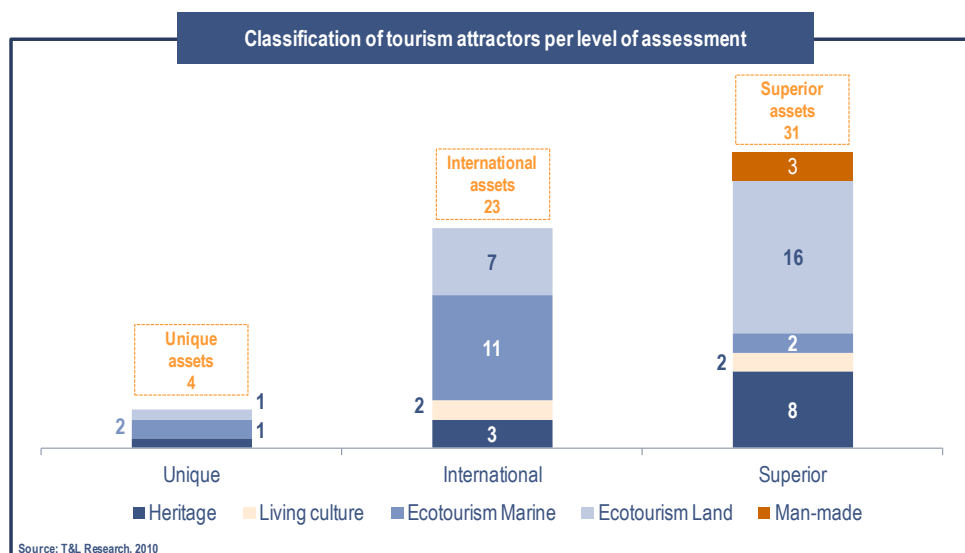
6.1 Tourism assets inventory and assessment

Belize is a region which is particularly rich in heritage and cultural assets as well as significant ecotourism-based tourism assets. A wide range of these assets, both cultural and natural, are attractive for international tourism.

T&L identified following 92 main tourism assets per attractor category: 45% of the main tourism assets are classified as **cultural attractors**: 35 main heritage attractors and 6 living culture attractors (mainly festivals). 49% of the tourism assets are **ecotourism natural attractors**: 30 are assets on land, such as natural parks, caves, wildlife sanctuaries and 15 are marine ecotourism assets. Only 7% of the main tourism assets of Belize are **man-made attractors** such as entertainment activities.

Cayo and Toledo Districts are the richest regions within Belize in terms of tourism attractors, whereas Orange Walk and Corozal District are, in this context, the poorest ones. However, despite of having a lower supply of tourist assets, these two districts can be considered as emerging destinations with vast ecotourism areas and biodiversity. On the other hand, in Corozal District the Free Trade Zone is located close to the border with Mexico having great potential to attract tourists coming from the neighbour country. In Cayo District, 24 different attractors were identified, whereas in Corozal District there were only five.

The assessment of attractors in Belize shows a considerable number of attractors with high or potential interest for tourists.



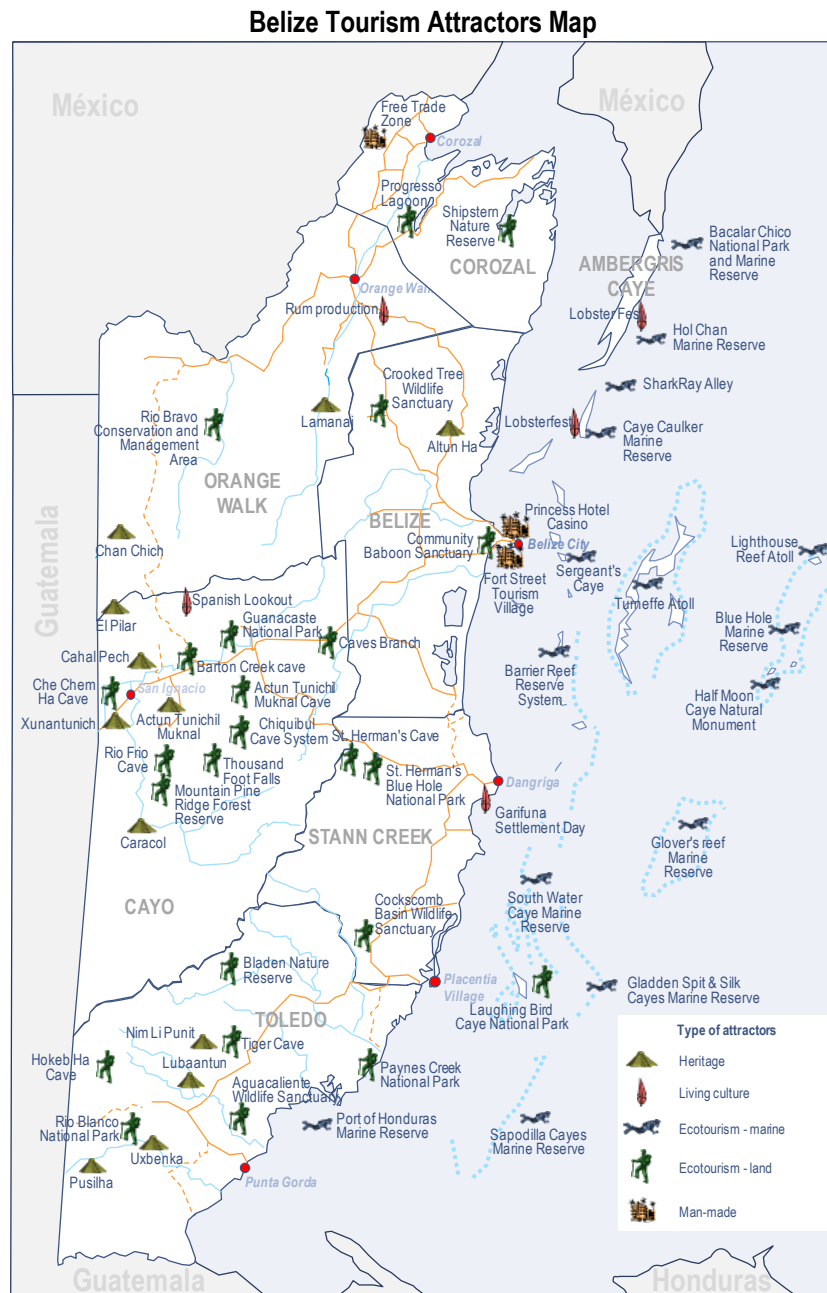
Source: T&L, 2010

T&L identified that **Belize hosts four “unique tourism assets”** with international recognition attracting tourists by themselves. These assets are the Barrier Reef Reserve System, the Blue Hole Marine Reserve being unique of its characteristics in the world, the Caracol Mayan site with a highest level of competition but with special tourism interest and known as the mother of all Belizean Mayan sites and the Chiquibul Caves System hosting a great network of caves in the Chiquibul national park located

in Cayo. The first two assets are classified as Ecotourism marine assets and located off-shore Belize, whereas Caracol and Chiquibul caves system as part of Belizean heritage is located in Cayo district.

23 assets were graded to have **international recognition** and due to their high degree of attractiveness, to have a great potential to attract tourism. 31 tourism assets are classified as “**superior**”, indicating a high potential to attract tourism with a medium degree of attractiveness. With 16 assets being graded as superior or above, Cayo district is the most attractive district within Belize, followed by Toledo (12 assets) and Ambergris Caye/ Off-shore Belize concentrating mostly ecotourism marine assets (10 assets).

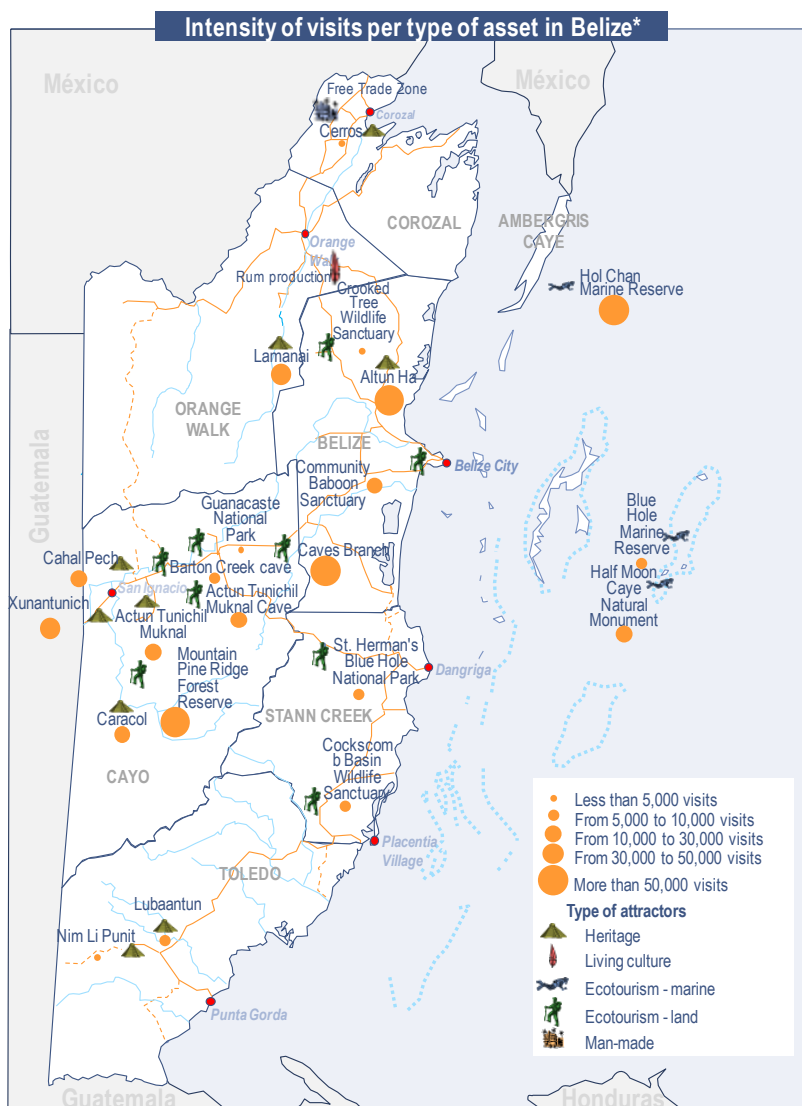
T&L has created the following tourism attractors map for Belize showing the location of the attractors identified for this assessment:



Source: T&L, 2010

The most visited assets are the Caves Branch in Cayo District, Altun Ha in Belize District and Hol Chan Marine reserve in Ambergris Caye. The least visited sites are Guanacaste National Park, Crooked Tree Wildlife Sanctuary and Cerros. On average, 86% of the visits to the assets are generated by foreigners and 14% by locals.

The Belize map that follows has been adapted with the intensity of visits of some tourism assets:



Source: Travel and Tourism Statistics, 2008 - Belize Tourism Board

Note: Data is not available for all tourism assets; therefore this analysis is based on a certain number of assets, listed in this map

6.2 Tourism product offering analysis

This section sets the basis for the future product offering of Belize. First, the current tourism products are identified including their major characteristics and their faced obstacles for a sustainable development. It focuses on the assessment of infrastructure directly and indirectly related to tourism and the way it enables or hinders tourism activities and development in the destination.

Belize offers tourists products for different types of tourism and particularly the most relevant are: cultural, nature & ecotourism, adventure, and cruise.

Cultural Tourism

Cultural tourism is the subset of tourism concerned with a country or region's culture, specifically the lifestyle of the people in those geographical areas, the history of those peoples, their art, architecture, religion(s), and other elements that have helped shape their way of life. Cultural tourism includes tourism in urban areas, particularly historic or large cities and their cultural facilities such as museums and theatres.

Due to Belize's cultural richness in Maya heritage composed of thousands of ruins and indigenous cultures, most cultural tourism products offered are based on festivals and cultural experiences such as Garifuna activities and Mayan dances. Most Maya temples are located in the central area of Belize with most of them reachable in less than 1.5 hours by vehicle. However, accessibility to most temples and remains is modest and is therefore the main issue to be solved. Furthermore, most of the cultural heritage (especially valuable Maya sites) still remains covered and unexcavated.

Belize cultural tourism is characterized by the following features:

- ▶ Rich Maya heritage composed of thousands of ruins, which some of them could be stressed due to its international and unique attractiveness.
- ▶ Most Maya temples are located in the central area of Belize being most of them reachable in less than 1.5 hours by vehicle.
- ▶ Only part of the cultural heritage in Belize is opened to tourism since most of it still remains covered and unexcavated, being particularly relevant at some of the most valuable Maya sites.
- ▶ Living culture is an issue that should be further developed and expanded throughout the year, rather than only being displayed in very specific days of the year coinciding with cultural festivals and events.
- ▶ Belize shares a rich Maya heritage with its neighbouring countries, an issue that could be seen as an opportunity to foster cross-border tourism initiatives with the aim of promoting heritage tourism in the country.

Ecotourism / Nature Tourism

Ecotourism is responsible for travel to fragile, pristine, and usually protected areas. It strives to be low impact and (often) small scale. It is considered to be a specialized typology of tourism involving visits to land and marine nature areas with the aim of discovering, living and feeling its natural environment through activities such as bird watching, discovering wildlife, nature photography, etc.

Belize hosts a world-class reef and caye system that extends the length of the country's 185-mile coastline. Home to 70 types of hard corals and nearly 500 species of fish, it offers a diverse and abundant selection of marine life. 75% of the country is

covered with beautiful tropical rainforest of which 40% is protected. This land is rich in a wide variety of plant and animal species. Certain Nature Parks and Reserves mostly close to the Central Belize area are well prepared for tourists with nature trails, wildlife sightseeing, and facilities. However, those out of this area need further investment for product development. Regarding the accessibility of nature parks and reserves, there are currently many long unpaved roads and some parks still remain inaccessible.

Belize nature tourism is characterized by the following features:

- ▶ A world-class reef/caye/atoll system that extends the length of the 185-mile country's coastline. Diverse and abundant selection of marine life with 70 types of hard corals and nearly 500 species of fish.
- ▶ Certain Nature Parks and Reserves mostly close to the Central Belize area are well prepared for tourists with nature trails, wildlife sightseeing, and facilities. However, those out of this area do need further investment for product development.
- ▶ Except certain particular cases, accessibility is a clear issue that needs to be solved to facilitate access to the broad network of nature parks and reserves in Belize. Presently, accessibility to those present long unpaved roads and even today some relevant ones still remain inaccessible.
- ▶ Belizean tourism product supply still remains narrowed when it comes to offer nature based activities, particularly inland, and those presently offered are concentrating on very few marine and inland sites producing higher environmental risks to those particular ones.
- ▶ The environmental impact of the tourism activity is clearly an issue in marine and land nature reserves. There is a high risk for strong deterioration of the biodiversity, particularly on marine areas, which are so far the most visited ones.

Adventure Tourism

Belize's nature environment provides a setting for adventure tourism activities for experiences and non-experience visitors. In Belize adventure tourism is particularly developed in jungle areas. Jungle adventure tourism involves active multifaceted physical means of travel in the jungle regions of Belize. Jungle tours are becoming a major component of green tourism in tropical destinations and are a relatively recent phenomenon in Western international tourism.

Belize is a living laboratory in this regard and you can meet some of Belize's wildlife in the "Best Little Zoo in the World," climb Victoria Peak, canoe on the Macal river, cave-tube down the Sibun River or listen to the roar of the black howler monkey in the forest canopy overhead. Guided tours, adventure packages, day trips, overnight expeditions, and annual races take advantage of the year-round river flows and are easily accessible.

Belize adventure tourism is characterized by the following features:

- ▶ Belize has an extraordinary and pristine nature environment to develop adventure tourism activities for experienced and non-experienced visitors.
- ▶ Adventure guiding licenses are general focused (except for caving, whale shark, and diving) and therefore further specific licenses for technical activities should be given in areas such as mountaineering, kayaking, rock climbing, canyoning, etc. Focused training for such specific activities should also be provided.
- ▶ Adventure activities are taking place without sufficient safety conditions (i.e. no regular use of helmets, lack of security systems, not available medical or first aid services on site, etc.)

Cruise Tourism

Belize offers cruise tourists the opportunity to visit the fascinating mainland and the extraordinary coastline, by means of numerous excursions, tours and activities which are organized daily. Cruise tourism involves pleasure trips by ship, where the voyage itself and the ship's amenities are part of the experience, as well as the different destinations along the way. The cruise sector is of great importance in Belize reaching almost 600,000 cruise visitors in 2008, which is 71% of the total arrivals including stay-over tourists. Belize City hosts the most cruise traffic, with over 40% of passengers disembarking from its ports. During their stop-over on the mainland, cruise visitors undertake excursions to the coast, visits to the zoo, or more adventurous activities to Mayan Ruins, hiking, or cave tubing.

Belize cruise tourism is characterized by the following features:

- ▶ Belize cruise visitors are undertaking day-visits to major tourism attractions in Central Belize, therefore the same attractions (marine and inland) are exposed on a daily basis to serious environmental and social negative impacts through the mass tourism activity caused by cruises.
- ▶ The impact of cruise tourism on Belize's eco-tourism and cultural sites, which is gradually changing the characteristics of visits to popular cruise tourism sites from eco-tourism/ cultural experiences to mass tourism experiences.
- ▶ Non existence model for cruise tourism and unclear policy on regulations and considerations the Cruise Tourism industry should be basing their activity on.

7. Conclusions

7.1 SWOT

Belize as a tourism destination has a wide range of strengths that should be promoted in terms of tourism development. Its tourism attractiveness excels on biodiversity, ecotourism and cultural sites with specific sites valued at an international interest having great potential for tourism development.

However, sustainable practices should be an issue to include in all tourism practices in order to avoid environmental damage of the natural and cultural sites of Belize.

On the other hand, it also faces many weaknesses highlighting lack of basic service provision and infrastructures, technical skills and quality of tourism facilities, a low promotion of the destination, lack of tourism product services and other socio-economic constraints that should be minimized.

As described below there are the main conclusions obtained from the diagnostic phase, highlighting strengths, weaknesses, opportunities and threats:

Strengths

- ▶ Tourism Supply
 - Attractive and varied cultural and natural resources
 - Belize hosts three unique tourism assets in heritage and ecotourism
 - Small size of Belize facilitating easy connections
 - Friendly people involved in the tourism industry
 - Belize as an English speaking country
 - High social cohesion towards the tourism industry
 - The destination is not overdeveloped neither overcrowded
 - Peaceful democratic position offering stability and security
- ▶ Tourism Governance and Institutional Capacity
 - Comprehensive system for managing tourism
 - Large number of public entities, private sector associations and NGOs involved in tourism
 - Good involvement of certain stakeholders in the decision-making process
 - The Government of Belize offers specialized and effective incentives for investment

Weaknesses

- ▶ Tourism supply
 - Lack of preservation, use and management of the tourism assets
 - Most cultural heritage still remains covered and unexcavated
 - Relevant tourism assets lack tourism facilities and services
 - Lack of air connections to Europe, South-America and Canada
 - Low supply man-made attractors (leisure services)

- Expensive tourism destination where pricing do not match quality
- Reduced cooperation among the fields of tourism activity
- HR lack of technical skills and resistance to learn languages
- Constraints on basic services provision and infrastructure
- Lack of sustainability awareness
- Presence of crime in some areas
- ▶ Tourism governance and institutional capacity
 - BTB is under-resourced and has limited presence and responsibilities
 - Lack of legislation and infrastructure on crisis/disaster plan
 - Relevant decisions are being made without the input of the tourism sector
 - Lack of a proper tourism marketing plan for Belize
 - Limited access to capital for investment

Opportunities

- ▶ Tourism supply
 - Wide range of tourism attractions addressed to a high variety of tourists
 - Belize hosts underutilized attractive natural and cultural resources
 - Great potential for developing and diversifying tourism products
 - Some areas have potential to grow up and develop in tourism volume
 - Belize has the opportunity to boost transport synergies with neighboring destinations
 - Opportunity to establish quality standards
 - Opportunity to foster cross-border tourism initiative
- ▶ Tourism demand
 - Overall increase of overnight visitors and annual tourist expenditure
- ▶ Sustainability
 - Tourism industry must be seen as a vehicle for the alleviation of poverty
- ▶ Tourism governance and institutional capacity
 - Great importance of available, accessible and direct flights from top markets
 - Certain core stakeholders should be highly considered in the definition and implementation of Belize Tourism Policy

Threats

- ▶ Tourism supply
 - Cruise tourism might boost mass tourism to Belize depriving tourism visitor experience
 - Belize faces competition from tourism consolidated neighboring countries
 - Global recession might affect tourism industry

- ▶ Tourism demand
 - Risk of mass tourism in certain tourism areas
- ▶ Sustainability
 - Risk of deterioration to some protected archaeological and natural sites
 - Threat of natural disasters that might impact to competitiveness and development
 - Vulnerability of climate change, overall in coastal areas
 - Devastating impacts that oil spill could have on Belize's very sensitive marine ecosystem
 - The current economic situation poses even greater challenges in maintaining a healthy environmental and natural resource base

7.2 Constraints for Sustainable Tourism Development

The following summarizes main constraints identified during the diagnostic phase and highlights their negative impacts.

- ▶ **Poor level of accessibility on land**, mainly due to a small amount of paved roads leading to the tourism assets. Result in:
 - Low visitor numbers (as for the three unique assets identified: Coral Reef, Blue Hole, Caracol and assets in Caracol, Orange Walk and Toledo district, broad network of nature parks and reserves)
 - Overcrowding at tourism destinations that are easy to be reached (mainly due to a large amount of cruise passengers)
- ▶ **Poor level of accessibility by air**, mainly due to few international flight connections and bad connecting flight schedules. Result in:
 - Low arrivals of European visitors (a lucrative market segment)
 - Fewer overnights in Belize, and more overnights spent at the stop-over destination
- ▶ **Lack of sufficient and qualitative tourism services and facilities**, mainly due to poor training methods, low investment level of international hotel chains and local private companies. Result in:
 - Degradation of Belize's tourism image
 - Low levels of cooperation in the fields of mutual activity
 - Low level of tourist satisfaction
 - Low level of diversification, result in the concentration of tourism supply and create tourism hubs
- ▶ **Lack of handicraft shops** and commercialization of traditional products and leisure activities. Result in:
 - Less foreign exchange
 - Low level of tourist satisfaction, as arts and crafts are part of the visitor experience
- ▶ **Lack of asset management**, mainly due to lack of awareness, knowledge and financial issues. Result in:

- Over-visitation of sights
- Serious environmental and social negative impacts
- Decrease of destination image: from eco-tourism or cultural sites to mass tourism (such as in Lamanai and Altun Ha)
- Risk of serious deterioration, due to lack of diversification of product offering (marine assets, nature assets)
- Damage of marine habitat due to larger vessels, especially at anchor
- ▶ **Lack of communication and promotion of tourism assets.** Result in:
 - Low visitor numbers at international and unique attractive assets, such as in Toledo and Cayo districts
- ▶ **Insufficient waste disposal,** result in:
 - Mosquito infestation
 - Malaria and dengue infection risk
- ▶ **Insufficient sewage systems,** result in
 - Water contamination
 - Diseases due to water contamination
 - Negative image of the country's development
- ▶ **Lack of land planning and regulation,** result in
 - Haphazard and inadequate urban development
 - Incompatible development of commercial, industrial and residential activities
 - Environmental concerns
 - Urban hubs with increased population impacted by pollution
 - Traffic congestions mostly due to bigger vehicles dominating small streets
 - Degradation of the landscape
 - Beach erosion and navigational safety hazards due to coasts clustered with piers and jetties
 - Uncomfortable feeling for residents and visitors
- ▶ **Lack of public awareness programmes,** result in:
 - Degradation of beaches and the natural environment, promotion of ecotourism and sustainability issues
 - Lack of understanding the necessity for ecotourism, especially in nature rich countries
 - Inappropriate usage of natural resources, such as the reef, national parks and rainforests
- ▶ **Lack of local involvement into to the Tourism Value Chain,** result in:
 - Lack of awareness and economical importance of tourism to improve the local quality of life.
 - Neglecting or lack of understanding on how to use tourism as a tool for poverty reduction.

NATIONAL SUSTAINABLE TOURISM MASTERPLAN FOR BELIZE 2030

Strategic Framework for sustainable tourism development in Belize

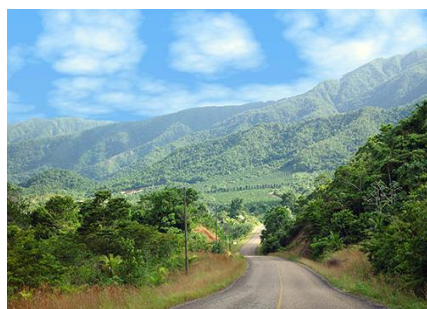
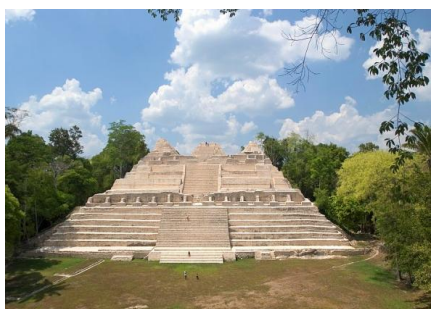
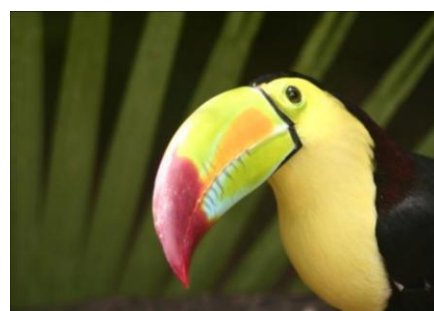


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1 Introduction

The present strategic framework of the National Sustainable Tourism Master Plan of Belize 2030 is composed of a set of strategies whose implementation would lead Belize to be a competitive and sustainable tourism destination in tomorrow's highly competitive tourism environment.

The strategic goals: what Belize aims to achieve through the tourism master plan

The strategic goals are based on Belize's strengths and weaknesses and are selected to mitigate constraints as well as to take advantage of Belize's opportunities. To achieve this, the objectives which the master plan aims to achieve in the period from 2010 to 2030 are structured into four groups:

- ▶ **Sustainability:** enhance positive sustainable impacts from tourism
- ▶ **Optimization:** optimize socio-economic benefits from tourism
- ▶ **Competitiveness:** achieve competitiveness as a world-class destination
- ▶ **Leadership:** support Belizean stakeholders to take leadership of the country's own sustainable tourism development

A set of specific strategies has been defined with the aim of achieving the above mentioned goals. Each strategic group is composed of a set of strategies forming its core structure. The approach of connecting objectives to strategies is followed throughout the entire master plan as follows:

Objectives	Strategic groups	Strategies
Sustainability	<ul style="list-style-type: none"> • Destination strategy 	<ul style="list-style-type: none"> • Product cluster programmes • Focused and controlled development • Phased implementation programme
Optimization	<ul style="list-style-type: none"> • Product strategy • Market strategy 	<ul style="list-style-type: none"> • Diversification of the product portfolio • New target markets and market penetration
Competitiveness	<ul style="list-style-type: none"> • Commercial strategy 	<ul style="list-style-type: none"> • Excellence in tourism through quality improvement • Unique branding to commercialize better
Leadership	<ul style="list-style-type: none"> • Governance and institutional strategy 	<ul style="list-style-type: none"> • Public-Private Partnerships (PPPs) • Destination Management Organization (DMO) • Cluster Management Units (CMUs)

Source: T&L, 2010

It is crucial at this stage to determine the appropriate positioning or vision statement that will differentiate Belize from its competition, thus facilitating the achievement of these objectives. The vision statement articulates the envisioned ideal future of Belize in 2030 from the tourism point of view. Hence, it provides the answers to the following questions: What kind of tourism destination will Belize become in 2030? What kind of tourism products will Belize offer? And what kind of impressions and experiences will Belize provide to tourists? The answer to these questions will certainly affect the outcomes of the master plan, and thus the degree of success in achieving the set objectives.

The strategic vision: how Belize should be seen in 2030

Belize is a county with rich natural resources ranging from the Caribbean beaches to the depths of the rainforests; these sanctuaries are home to a wide range of exotic flora and fauna species. Within the country, multiple civilizations have existed, building a rich cultural heritage which is nowadays accessible and able to be experienced.

These factors lead to the definition of an appropriate strategic vision statement of Belize in 2030 including the key components of the concept: sustainability, authenticity, uniqueness and competitiveness.



This vision statement highlights four main components, of how tourism in Belize will be perceived, namely that Belize will be a sustainable, authentic, unique and competitive tourism destination by 2030.

- ▶ **Sustainability** refers to the capacity of endurance, meaning that tourism in Belize will require the reconciliation of environmental, social and economic demand in order to be sustained for future generations. Hence, a sustainable tourism strategy with ecologically-friendly destinations is an investment in the future of the entire country and its population.
- ▶ **Authenticity** refers to the Belizean lifestyle and to its unspoiled nature. With its different cultures and ethnic groups, Belize is a cultural melting-pot. The people represent the warm, friendly and welcoming Caribbean charm of Belize and are pleased to present their own traditions to international visitors.
- ▶ **Uniqueness** refers to Belize's natural and cultural variety. Belize is unique in its Central American – Caribbean spirit, in its British colonial past within Central America, and in some of the natural assets offered and preserved by the country.
- ▶ **Competitiveness** is measured in comparison with its main competitors. This means that Belize will foster its strengths and minimize its existing weaknesses. As a tourism destination, Belize will always undergo new changes in order to remain up-to-date with the customers' demand. Hence, when visitors will have the choice of visiting Central America, Belize will definitely be on their itinerary.

In order to realize the defined vision of tourism in Belize in 2030, the required key elements are:

- ▶ The development of **mid-high quality tourism facilities** to enhance the image of Belize as a tourism destination and to stimulate the demand of...
- ▶ ...a **mid-high clientele**, which will respect Belize's culture and nature. This segment will provide the most appropriate image of Belize as an internationally recognized and respected eco-tourism destination and will generate the required financial resources to maintain...
- ▶ ...a **mid-low level of development** of the destinations in order to remain on an ecological friendly and sustainable path with...

Strategic Framework for Sustainable Tourism Development • National Sustainable Tourism Master Plan of Belize

- ▶ **...low environmental and social impacts** to prevent the degradation of natural and social aspects and/or assets and therefore, to remain on a sustainable development path.

The strategic framework

The strategic framework for sustainable tourism development has therefore been designed to achieve optimization, enhance sustainability, promote competitiveness and support leadership at national and destination-level in Belize. Each strategic group is composed of a set of strategies that form its core structure, which is structured as follows:

- ▶ **Strategy to enhance sustainability** of tourism: destinations strategy
- ▶ **Strategy to ensure optimization** of tourism: product and market development strategies
- ▶ **Strategy to achieve competitiveness** of tourism: commercial strategy
- ▶ **Strategy to support leadership** of the tourism sector: institutional strengthening and governance strategy

2 Strategy to enhance sustainability of tourism: destinations strategy

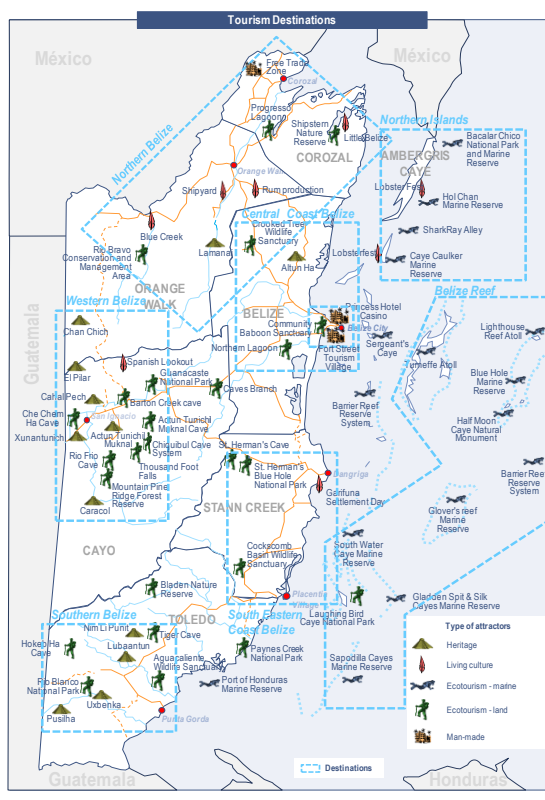
Tourism development in Belize may cause negative impacts, such as uncontrolled development, mismanagement of protected areas, etc. This is especially so considering the high sensitivity of Belize's tourism assets, making necessary a strong sustainability approach in order to conserve them well in the years ahead. Therefore, the maximizing of positive economic impacts and the minimizing of both environmental and social negative impacts are required in order to market Belize as a high-class destination over time, since no high-quality tourists would be willing to pay a large sum of money to visit a country where the environment is being seriously damaged and the social aspects neglected.

Thus, to preserve Belize's high-class model for tourism, it is of capital importance to use the country's strengths (natural biodiversity and cultural mixture) wisely, by protecting and conserving them when opening it up for new tourism markets and increased visits, so that resources are used sustainably and do not suffer from degradation.

Hence, the destination development strategy must be conceived integrating that sustainable approach, by determining the concept for each destination, as well as the appropriate model for development in terms of overnights and densities. The degree of sustainability in the overall tourism sector in Belize will certainly depend on the development model applied at each destination.

A set of seven tourism destinations have been identified and agreed upon for development by creating hubs based on present and potential tourism flows. These destinations define the regional nature of tourism products that are either currently offered and/or that could be developed. Those seven destinations shown at the map are the following: Northern Belize, Northern Islands, Central Coast Belize, Western Belize, South Eastern Coast Belize, Southern Belize and Belize Reef.

To achieve sustainability, three strategies have been defined in line with the strategic objective:



► **Defining product cluster programs:** design and develop a wide set of cluster programs in order to develop products structured as national clusters. These programs should be composed of actions and projects that products require for successful sustainable development. The programs will be conceived at the action plan phase, being very cautious to avoid any negative environmental and social impact.

► **Focused and controlled development:** implementation should be focused on specific areas or sites, facilitating control of the positive and negative impacts as well as managing development properly. A focused implementation will allow the maximizing of economic impacts and the reduction of negative ones. Destinations in Belize would benefit much more through investment optimization - meaning not extending them widely, but restricting them to specific sites —which in turn would also restrict any negative impact caused by development of those sites by conserving others well.

Since sustainability is a key issue to be considered in the destination strategic framework, both development and density models proposed for each destination

Strategic Framework for Sustainable Tourism Development • National Sustainable Tourism Master Plan of Belize

take into account the positive and negative impacts at economic, social and environmental levels, as well as the carrying capacity of each site. The strategic model for tourism in Belize reflecting those criteria is focused on a mid-level growth in terms of overnights –low in rural or sensitive sites– and low in terms of density, except in certain areas allowing higher densities. The overall development/ density strategic model per destination has been structured as follows:

Development and density model of Belize's tourism destinations

Destination	Overnights in 2008	Overnights expected in 2030	Development of overnights / visitors	Density level ¹
Northern Belize	200.674	651.310 CAGR 6.9% (2010 – 2020) and CAGR 5% (2020 – 2030)	Mid (overnights) Mid-High (day visitors)	Low/ Mid
Central Coast Belize	307.251	897.376 CAGR 5.5% (2010 – 2020) and CAGR 6.1% (2020 – 2030)	Mid(overnights) High (day visitors)	Mid
Western Belize	486.502	989.084 CAGR 4.3% (2010 – 2020) and CAGR 3.5% (2020 – 2030)	Low in rural areas, mid in urban areas (overnights)	Low in rural areas/ Mid in urban areas
Riviera Belize ²	113.942	1.262.520 CAGR 13.5% (2010 – 2020) and CAGR 12.5% (2020 – 2030)	Mid (overnights) Low (day-visitors)	Mid
Placencia	166.438	489.710 CAGR 8.6% (2010 – 2020) and CAGR 3% (2020 – 2030)	Mid (overnights) Low (day-visitors)	Low
Southern Belize	40.587	248.370 CAGR 10.4% (2010 – 2020) and CAGR 9.6% (2020 – 2030)	Mid (overnights)	Low
Northern Islands	663.287	1.209.224 CAGR 4.6% (2010 – 2020) and CAGR 2.2% (2020 – 2030)	Low (overnights)	Low in rural areas/ Mid in urban areas
Belize Reef	68.644	147.783 CAGR 4.0% (2010 – 2020) and CAGR 5.0% (2020 – 2030)	Mid (day visitors) Low (overnights)	Very low

Source:T&L, 2010

- ▶ **Phased implementation program:** due to the constrained economic resources Belize has for tourism development, it is required to **set priorities for investment and define a clear phased program**. This will also improve benefits from tourism allowing the projects to be completed, and their results achieved, before new investments are starting in other programs or sites.

At that stage, it is necessary to determine what priority will be given to each of the destinations presented, in order to identify those providing the best opportunities for expanding the value of tourism with the lowest risk. Different comparative indicators relevant to the development of sustainable tourism development were selected, rated and ranked in order to identify the prioritized destinations based on the Importance-Urgency/Implementation Ease analysis.

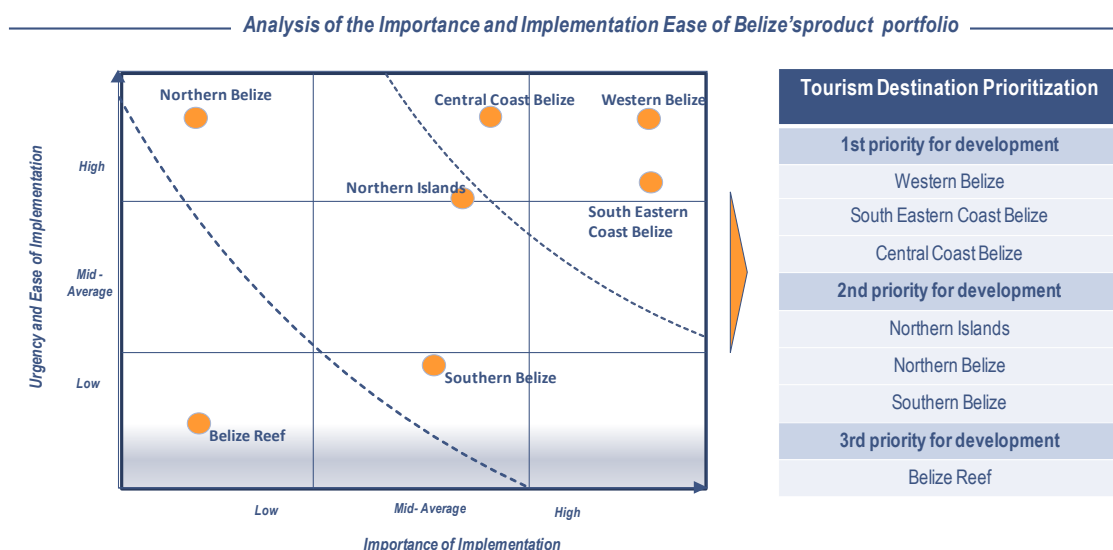
- ♦ The **“importance”** criteria referred to the destinations’ sustainability issues: Environmental – Economic – Social and destination tourism planning issues.
- ♦ The **Urgency/Implementation Ease** criteria referred to socio-economic and environmental issues as well as tourism planning and management issues.

¹ References to the density levels is provided in Appendix A.

² This table divides the destination South Eastern Coast Belize in Placencia Peninsula and Riviera Belize in order to illustrate the individual changes in that destination.

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Based on these criteria, the matrix below indicates each importance-urgency/implementation ease rating of each tourism destination.



Source: T&L research, the criteria and their ranking can be found in the Appendix of the Strategic Report

The importance-Urgency/Ease of Implementation Analysis identifies which tourism destinations should be developed first.

- Western Belize, South Eastern Coast Belize and Central Coast Belize** were identified as sharing approximately the same level of importance and urgency for development, especially due to their high potential market share of tourist overnights by 2030, the fact that these destinations represent a mid-high potential to reduce local tourism seasonality and that these destinations currently are the most operated by international tour operators. The high rating in implementation ease and urgency of tourism in these destinations is due to their high potential to impact positively on the local economy based on their high local unemployment rates, their high potential share of tourism overnights hosted by 2030, their currently planned construction developments, the strong stakeholder participation and the presence of an updated tourism master plan.
- A second priority of development was identified for the **Northern Islands, Northern Belize and Southern Belize** due to the high potential of positive socio-economic impacts and their high growth potential or potential market share of tourism overnights by 2030. Northern Islands was highly rated for its existing infrastructure level and plans for new developments. Northern Islands and Southern Belize were rated to be highly important based on their potential to offer seasonality-reducing tourism products, their potential to reinforce Belize's eco-friendly and sustainable destination image and their highly bio-diverse environments. Northern Belize was rated to be highly urgent to be implemented due to its high unemployment rate and criminality rate in the current existing Free Trade Zone.
- Belize Reef's** development is not regarded to be urgent or important for the general development of the country.

This rating was especially a result of its low potential to generate overnights, the low level of projects planned, its lack of management capacity, its current development level within the destination and their poor connectivity to other tourism destinations.

However, this does not mean that Belize Reef should be left out, as its investment and development is required to diversify and complete Belize's tourism destination portfolio.

3 Strategy to ensure optimization of tourism: product and market development strategies

The current scope of work by the BTB is limited to marketing, registration/ licensing and capacity building issues, and is not involved in the process of product development –but only goes as far as quality assurance, training, tourism planning, and investments promotion. Further input from the tourism sector should also be allowed in terms of accessibility and transportation infrastructures. This is required in order to avoid the current conditions of the sector in the country, characterized by insufficient quality of tourism facilities and services, as well as non-structured tourism products.

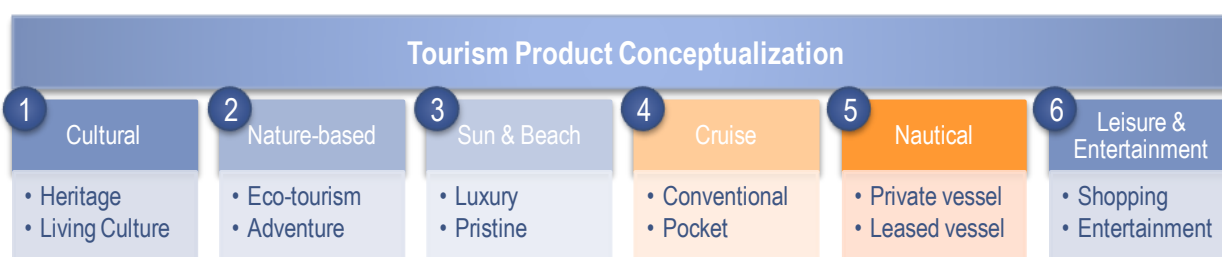
To reach optimization, a strategic product and market framework has to be structured to maximize benefits from Belize's portfolio of tourism products, targeting new focused and niche markets:

- ▶ **Diversification of products:** Belize has a wide range of world-class assets (both inland and marine) such as the Barrier Reef, the Blue Hole, the Chiquibul Cave System, Caracol, etc. providing an opportunity to create an excellent diversified **product portfolio with the capacity to generate overnights, and thus increase the average length of stay.**

The main tourism products are a selected set of products which are strategic for the development of the country. They have been selected from a competitiveness-importance-attractiveness analysis of the country from a long list. They are main tourism motivations that encompass many tourism activities under their product portfolio such as diving, sports fishing, demand driven.

Some of these products do already exist in Belize; however, all of them need to be further developed in order to enrich the tourist experience and enhance product diversification to meet the customers' demand.

As a result, Belize has strong potential to expand tourism developing by becoming structuring a destination offering of six main types of tourism experiences. The proposed product portfolio is composed of the following categories:

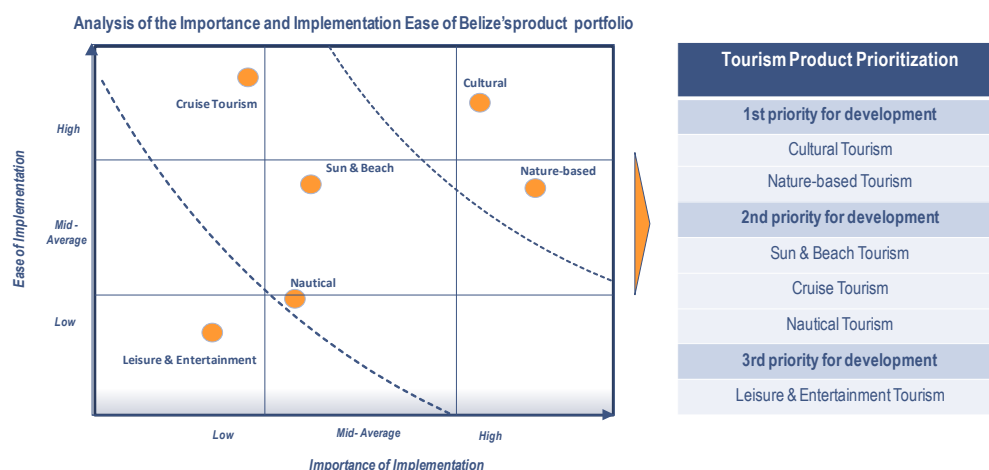


Source: T&L, 2011

At this stage, development priorities must be determined for each of the tourism products in order to identify which product provides the best opportunities for expanding the value of tourism with the lowest risk. Product prioritization is based on two basic criteria which will further prioritize the development and, hence, the investment priority of each product:

- ♦ The **importance** measure will be based on the competitiveness and attractiveness of each tourism product assessed from an overall perspective.
- ♦ The **ease of implementation** will indicate the level of urgency for development of the tourism product, as well as the technical feasibility or ease of implementation.

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The Importance/ Ease of Implementation Analysis identify which tourism products should be developed first.

- Cultural Tourism** is evaluated as being the first priority for development, based on its high importance on implementation and increased ease and urgency level. Its priority level is mainly due to the potential size of the global market consuming cultural tourism, its contribution to product diversification for Belize's tourism portfolio, its potential to reduce seasonality, its potential to reinforce Belize's sustainable tourism image, its geographical distribution within the country and the participation it attracts from national tourism stakeholders.
- Nature-based Tourism** is the most important tourism product to be developed; however, its implementation will require time and investment in, for example, educating professional labor forces, the need for specific accommodation facilities and the elaboration of concrete policies related to this product in order for it to be operated at a level of excellence. However, its first priority status is based on its growth potential in terms of arrivals, the potential revenues per product, and its potential to increase tourists' length of stay and spending. In addition, nature-tourism is regarded as being a product with high potential in regards to reducing poverty in rural areas.
- Sun & Beach Tourism** is evaluated as a tourism product of second priority due to its high potential for growth in terms of arrivals, its further consumption potential (as sun & beach tourists usually consume additional tourism products). However, Sun & Beach cannot be regarded as a first priority product due to its marked seasonality, its low potential for positive environmental impacts and its high potential for negative environmental impacts during the construction phase of the infrastructure.
- Cruise Tourism** is identified as being a product with a low to medium grade of importance. This is especially because its quality depends on the prior development of other tourism products, its low potential for generating revenues per visitor, its very reduced potential for generating overnights in the destination (especially for conventional cruise tourism) and the fact that conventional cruise tourism does not reinforce a sustainable tourism destination image. However, it is definitely the product whose development is most urgent and uncomplicated, as its functioning doesn't require the construction of specific accommodation facilities or a large amount of skilled or professional human resources. In addition, Cruise tourism is regarded as being a booming global and regional trend and it urgently needs to be developed (along with the destination) in order to prepare for the new markets and the further arrivals it is expected to generate. As Fort George Port has limited capacity and further cruise passengers growth is expected, a second conventional cruise port is required to enable growth of

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cruise passenger arrivals. Port Loyola was identified to become Belize City's second conventional cruise port.

- ♦ **Nautical Tourism** involves implementation that will be very time consuming, especially as it requires a high amount of professional and skilled labor, additional infrastructures and strong law enforcement policies to maintain its development.
- ♦ **Leisure and Entertainment** is regarded as being less important and most time consuming. Its development will hence consume more financial and human resources in order to accelerate the consolidated product-lifecycle status, as it will require a large amount of professional work forces, large investments in construction, promotion and maintenance. In addition, it is regarded as having only a small potential to generate overnight stays, as this tourism product is mostly concerned with day visits.
- ▶ **New target markets and market penetration of current ones:** new target markets should be established, thus avoiding dependency on one single market, according to criteria of visit motivations and return on investment. These should be managed and promoted appropriately in order to foster tourism overnights and revenues.

	International USA and Canada	International Europe	International Regional
Countries	<ul style="list-style-type: none"> ▶ United States of America ▶ Canada 	<ul style="list-style-type: none"> ▶ United Kingdom ▶ Germany ▶ France ▶ Netherlands ▶ Italy 	<ul style="list-style-type: none"> ▶ Central America ▶ Mexico ▶ Caribbean
% of arrivals by market (2009)¹	67.5%	12.7%	12.6%

¹ Source: BTB Statistics 2009

In 2009, about 232,249 international tourists arrived and spent their vacations in Belize. Its main tourism markets are the USA and Canada, which account for 67.5% of the arrivals. However, the majority of tourist arrivals to Belize are generated by day visitors, according to 75% of all the international arrivals to Belize.

The market strategy is based on **attracting new tourism markets with the highest potential** for Belize according to product

consumption patterns. The **main current international markets arriving to Belize have also been considered for market penetration**. The aim for both would be to increase their tourism demand, as well as increasing their length of stay.

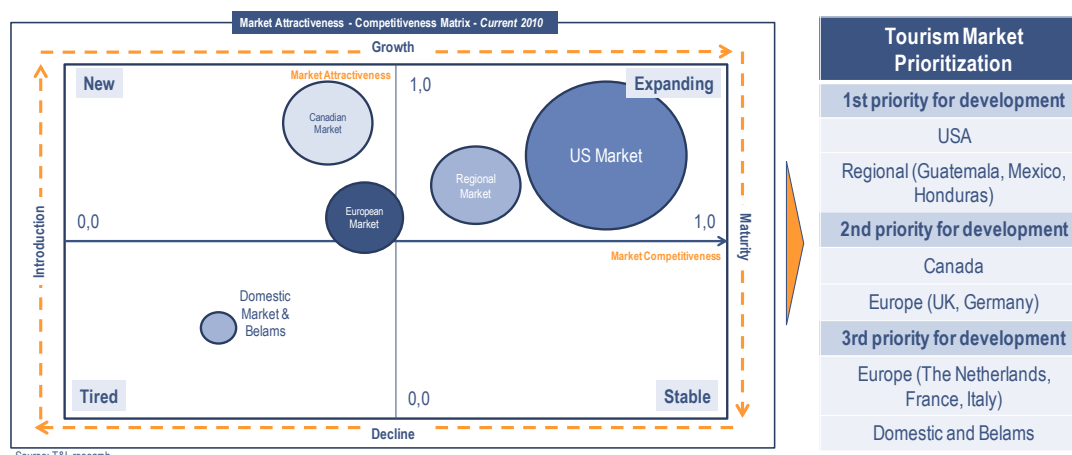
In order to set market strategies, the markets with most current potential are being analyzed based on their attractiveness and competitiveness:

- ♦ The size of the market circles represents the potential market size.
- ♦ The attractiveness combines four variables: the market's current size, the average length of stay, the annual growth and the average expenditure per market.
- ♦ The competitiveness combines two variables: the market share and the accessibility to reach Belize.

The four cells of the attractiveness – competitiveness matrix represent the stages which the markets are in at present, and can be related to the typical market-lifecycle which a market undergoes:

- ♦ New: introduction of the market
- ♦ Expanding: market growth
- ♦ Stable: maturity of the market
- ♦ Tired: stagnating market, market on decline

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The **US Market** has the highest competitiveness level and a very good attractiveness level. It is an expanding market and the market leader for tourism arrivals to Belize. In order to stabilize the market, the market requires high investments to increase the market growth.

- The US Market is the market of primary investment in order to increase the market growth and the revenues.
- In addition, the market should be utilized to foster revenues for its further development and the development and promotion of other expanding or new markets.
- Vision 2030: By 2030 the US Market should be a stable market and the most important market generating arrivals and large revenues for Belize.

The **Regional Markets**, especially Mexico, Guatemala and Honduras are attractive markets, based on their length of stay and their reasonable expenditures per day. The market requires a medium level of promotional investments in order to increase its market growth, which can be related to the strategy that Belize is and will be positioned as a mid/high-end tourism destination.

- Based on this strategy, only a small percent of regional markets may be able to afford to travel and spend vacations in Belize by 2030.
- The strategy would be to promote the specific products and destinations that are appropriate for the markets which meet the defined financial capacities by 2030, and then focus on the high-income travelers in these markets:
 - For Guatemala and Mexico markets the main motivations to be promoted will be Sun & Beach and Nautical tourism, under the types provided in the country.
 - For Mexicans close to the border with Belize, a key motivation will be to visit Northern Belize or Belize City for mid-high end Leisure & Entertainment offering.
 - Under the Regional Market Group, the international citizens travelling around the region will be considered. This group includes either independent travellers or tour operators' organized groups on regional tours and itineraries. The main promotion for these groups will be under the following key motivations:
 - Nature/adventure tourism
 - Cultural heritage routes
- The regional markets do not require huge promotional and infrastructural investment, but they do need improvements in terms of connectivity and trans-boundary facilitation (regional visa, improved laws for land transportation from Guatemala/Mexico to stop in Belizean destinations; etc.); as well as regional aerial and nautical routes and services.
- By 2030 the Regional Markets will be a small market, focused to attract only regional visitors willing to spend mid-high end holidays.

The **Canadian market** has the highest level of attractiveness (compared to the other markets, which is due to its increased annual growth rate) combined with a reasonable level of competitiveness. It is a growing market with a small share and can be therefore considered as a new market of growing importance.

- The Canadian market is regarded as very important, but is regarded as second priority, in the light of the needs and requirements of Canadian tourists in regards to the destination. Before being able to attract an important share of Canadian outbound tourists, Belize has to improve its infrastructure, tourism products and —most importantly— its security and criminality issues. Therefore, the development and investment in this market segment is expected to be initiated in the second phase of Belize’s tourism development.
- In order to reach further growth, the market requires ongoing promotional and marketing investments.
- Vision 2030: By 2030 the Canadian Market should be a stable market and one of the most important markets arriving in Belize.

The **European Market** has not yet taken the lead as Belize’s main tourism source market. It is regarded as a market with a high potential, given that the majority of the population travel at least once a year.

- The oncoming years and the market strategy will define the market role Europe is to play in Belize’s market portfolio. Currently, Europe has not yet been targeted. Current arrivals were not “generated”, but rather “happened” by chance. However, Europe should be properly introduced as a new market and correspondingly leveraged in order to foster further arrivals.
- The European market is also regarded as being a very important market, although second priority, due to the needs and requirements of European tourists in regards to the destination. Before being able to attract an important share of European outbound tourists, Belize still needs to: improve its infrastructure, tourism products and its connectivity from the European source markets; and reduce the price of its international flight fares, as European tend to look for good quality and high value for cost. Therefore, development of, and investment, in this market segment is expected to begin in the second phase into Belize’s tourism development.
- Vision 2030. The European Market should be one of the most important expanding markets feeding Belize —especially the markets of the UK, Germany, The Netherlands, France, and Italy.
- New markets could further be: Scandinavian markets, Spain.

The **Domestic and Belams Market** is a small market in terms of its volume and share. In addition it is experiencing decreasing market growth. The market generates revenues but is not very profitable. Nevertheless, domestic market should be promoted as a way to create awareness of civil society about the richness and world class quality of their destinations and assets, as well as to help them enhance national identity and pride about their country. This will finally support the complete development of the category of World Class tourism destination Belize is intended to become.

It is important to mention that Belize has always been a destination that attracts budget travelers from international source markets (mainly United States, Canada and Europe). In the new vision for the country, this is considered as a niche segment, which is not going to be avoided or prevented to visit Belize, but it neither will be encouraged to be attracted. This segment could keep coming to Belize, but it is not a priority market. Nevertheless, it will be considered its activity based motive rather than its low budget condition.

4 Strategy to achieve competitiveness of tourism: commercial strategy

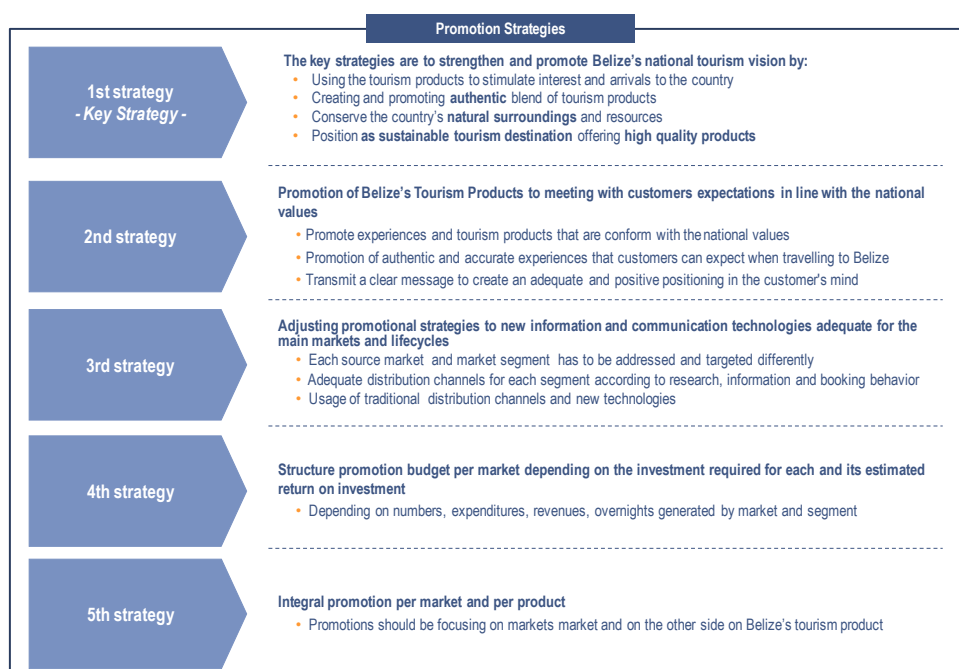
Competitiveness must include an awareness of both the limitations and challenges posed by global competition, at a time when effective government action is constrained by budgetary constraints and the private sector faces significant barriers to its competitiveness in domestic and international markets. Last but not least, the main objective of the master plan is the enhancement of Belize's competitiveness at a global level.

To a great extent, the target market affects the grade of competitiveness that a tourism destination has to achieve. Since Belize aims to attract a mid-high end clientele on a certain scale and to improve their tourism experience while in the country, the local tourism industry has to offer excellent tourism services and products. At present, although there are some excellent quality facilities aimed at offering "exclusivity", Belize's tourism facilities and services in general lack the quality required to target such a high-class segment. In addition, pricing is relatively high in Belize, and this is not likely to change in the next few years.

To achieve competitiveness, two strategies are proposed:

- ▶ **Achieving excellence in tourism through quality improvement:** the country has a strong opportunity to enhance tourism quality standards and enforce policies that will foster competitiveness through the implementation of the master plan. Quality enhancement should be undertaken to improve the standards of the tourism facilities and the offered services, human resources and, in general, the quality of the portfolio of tourism products.
- ▶ **Setting a unique branding to implement the right commercial strategy:** besides quality improvement, a second strategy to make Belize's tourism sector competitive is setting the right branding or unique selling proposition so as to commercialize better. Therefore, differentiating from competition through setting the right branding would allow Belize not just to market products to the right markets, but also to market them in the best way by communicating the right message to the right segment. The branding or unique selling proposition will be defined taking into consideration Belize's unique attractions and strengths to be fostered.

The right strategic framework does not specifically address a market, but stimulates the positioning of Belize as a destination on the global tourism map.



Source: T&L research

5 Strategy to support leadership of the tourism sector: institutional strengthening and governance strategy

Belize needs strong leadership in the tourism sector for development, due to the limitations in the competencies of relevant organizations such as the Ministry and BTB, the lack of confidence and cooperation from public and private sectors in regard to major decisions and the generation of new tourism initiatives, as well as the economic and technical constraints on national and municipal institutions.

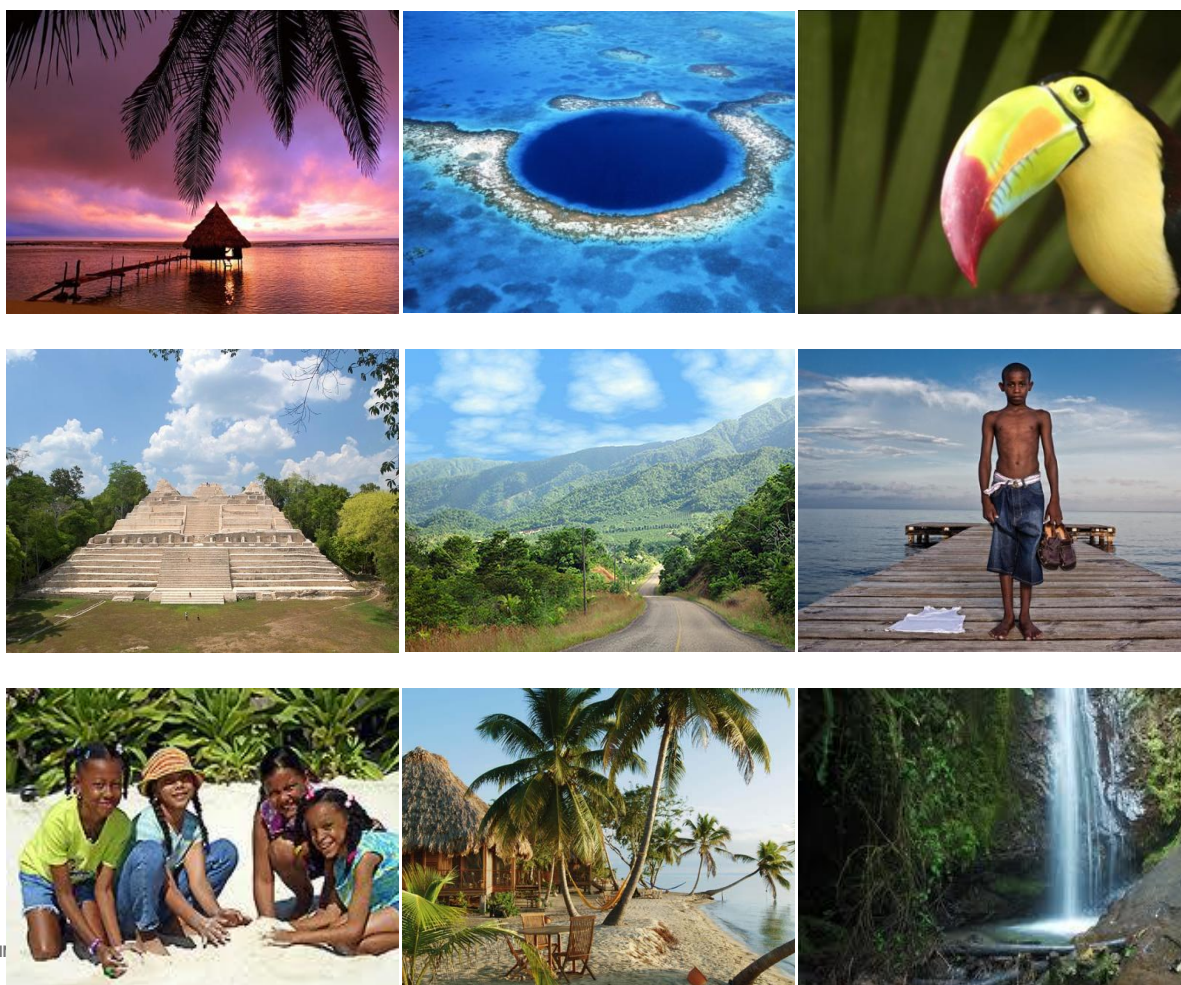
Since strong leadership is required, both public and private sectors should take a major role in leading the development of the tourism sector. A leadership model excluding either of the two sectors in decision-making and major developments will never maximize the benefits Belize can achieve from tourism. Therefore, leadership is a question of public-private decision-making and cooperation in each of the tourism clusters Belize aims to develop. Partnerships between the public and the private sector are the key element that needs to be considered in every step the tourism sector takes.

This master plan, through the objective of providing leadership, should increase the industry's capacity and create consensus and trust amongst Belize's tourism stakeholders, by implementing the following governance and institutional strategies:

- ▶ **Create Product Management Units under BTB structure** assigning a management team lead by a Product Development Director the responsibility to develop each of the core tourism products Belize would be selling to the source markets (nature tourism, culture tourism, cruise tourism, sun & beach tourism, nautical tourism, and leisure & entertainment tourism)
- ▶ **Creating a National Tourism Trust Fund** to promote investment, growth and development in the tourism sector, encouraging better management of tourism resources, while supporting The National Sustainable Tourism Master Planning.
- ▶ **Create Public-Private Partnerships (PPPs):** create PPPs in order to get the best results from tourism development, through promoting an integrated work approach and cooperation among the public and the private sector.
- ▶ **Attraction of Foreign direct Investment (FDI):** attract the international tourism investment community and hotel brands, in order to stimulate the economy and enhance the quality of the offering.
- ▶ **Generate SME growth:** Stimulate professionalization of the tourism service industry, boost local business tourism development and increase capacity skills development of the local workforce.
- ▶ **Create TSA account:** Improve statistical information reliability and relevance in order to support in strategic decision making
- ▶ **Create National security programs:** Address national security issues that affect the tourism sector and hinder sustainable development.

NATIONAL SUSTAINABLE TOURISM MASTERPLAN FOR BELIZE 2030

National Destination Physical Plan



June 2011

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PLAN SHEET

DEVELOPMENT PLANS AND RECOMMENDATIONS

NATIONAL SUSTAINABLE TOURISM MASTER PLAN OF BELIZE DEVELOPMENT PLANS AND RECOMMENDATIONS

COUNTRY LAYOUT

1	Destinations
2	Land Use
3	Ecosystems
4	Cluster of Products
5	Proposed Model
6	Summary Plan
7	Conceptual Plan

DESTINATIONS

A	Central Coast Belize	Regional scale	1/400.000
B	Northern Belize	Regional scale	1/400.000
C	Western Belize	Regional scale	1/400.000
D	South Eastern Coast Belize	Regional scale	1/400.000
E	Southern Belize	Regional scale	1/400.000
E.S	Punta Gorda	Special focus	1/35.000
F	Northern Islands	Regional scale	1/400.000
G	Belize Reef	Regional scale	1/555.000

1 Summary

This section of the National Sustainable Tourism Master Plan (NSTMP) aims to address the development of the tourism activities under a physical planning point of view.

It is a framework and does not mean that other initiatives that are not specifically included or mentioned in this master plan should not be considered. Those actions can imply a positive impact on tourism as far as they take into consideration the conceptual approach, spirit and general frame included in this Master Plan.

The land use, zoning and other physical plans, documents, and descriptions created in this scope are intended to address tourism development and to set the proper context for new development and redevelopment. These plans are indicative in nature, and do not have the engineering, environmental, legal and other studies needed for the formulation of regulatory and legally adopted plans that will act as a basis for entitlements.

They will serve as a point of departure and framework for the study and detailed due diligence required for specific investments in capital improvements, development and redevelopment. They will also serve as a conceptual basis for the formulation of regulatory and formal land use studies

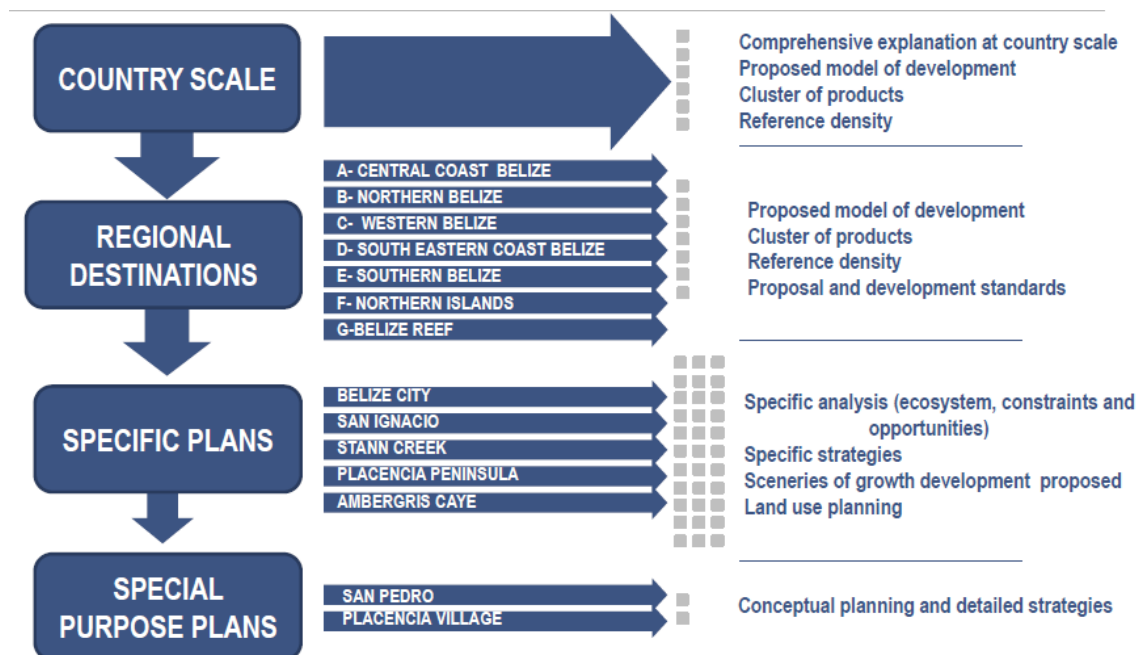
The main pillar and inspiration of this Master Plan is **CONSERVATION**. Major tourism attractors that differentiate Belize from other Caribbean and Central American destinations are the generally unspoiled natural environment and cultural resources. The Barrier Reef and Cays of Belize, and the Mayan antiquities are world class by any standard. The simple truth is that if the Tourism Industry in Belize is to provide a long-term benefit to Belize, the natural environment must take center stage in any and all planning regimes.

As with land use planning, concerted and coordinated conservation of resources is a low cost, high value strategy. Generally, it does not involve high capital investment, rather legislation, rule-making and administration (much of which is already in place). It is possible for developers to fund review of proposed plans by professionals not on staff. Failure to engage in a comprehensive conservation initiative may also result in a significant loss of value.

As for the way the **CONTENT** has been organized in the NSTMP at first there is an Introduction chapter in which have been included the general issues considered to understand how the proposals and the outputs are addressed.

The following sections develop the content and proposals for the different components of this work. Different scales have been considered from the broader to the more detailed. Each section includes a different level of information and proposals according the corresponding hierarchy and appropriate scale.

As follows there is a diagram summarizing the content of this document with the different levels of information and scales, the way the different destinations or geographical areas have been considered and the different proposals considered:



COUNTRY SCALE: Plans including the different destinations, tourism products, and existing ecosystems, models of development, reference density and development standards.

DESTINATIONS (7): Seven tourism regions have been identified and agreed upon to organize aspects of tourism development. These were selected because they are separate hubs based on present and potential tourism flows, existing products, natural resources, cultural resources and physical configuration.

The destinations define the regional extent of tourism products that are either currently offered and/or that could be developed. Those seven destinations have been designated with a letter:

- A. Central Coast Belize**
- B. Northern Belize**
- C. Western Belize**
- D. South Eastern Coast Belize**
- E. Southern Belize**
- F. Northern Islands**
- G. Belize Reef.**

For these destinations the proposed models of development in this NSTMP have been developed according the analysis, potentials, and attractions of each of the different areas within the country.

SPECIFIC DEVELOPMENT PLANS (5): Five specific areas have to be studied in greater detail in separate deliverable. These were selected for two reasons: according to the Terms of Reference of the current project (Phase III deliverable); and because of their importance to the existing tourism industry, as well as their potential for tourism development. Thus, on destinations A, C, D and F there will be Specific Development Plans developed in another document.

A.S. Belize City

C.S. San Ignacio

D.S. Placencia Peninsula

D.S. Stann Creek

F.S. Ambergris Caye

For these tourism destinations the Master Plan proposes a **LAND USE FRAMEWORK** that regulates the nature and typology of the tourism developments. As it is later explained it is tourism oriented and form-based and contends an indicative frame initially addressed to the public authorities, stakeholders and decision makers of any kind.

This NSTMP works with the assumption that this indicative frame should be further developed in order to become a regulatory one.

The different land use categories are organized by districts and specific land uses. The information and the chart are included in the Annex 3 of this NSTMP.

2 Introduction

This introduction provides a general description of the planning process and the main elements that coming from the analysis done, have been developed as tools to represent and understand the proposals. The plans that illustrate the process are described and illustrated in subsequent graphic plans section.

2.1 General objectives

The main objective of the planning process is to find a physical balance between conservation and development and to generate plans that support the growth of the tourism industry in Belize. In this case, development is tourism driven, and often at the interface between the natural and cultural resources of destinations and the development that brings people to experience those resources.

The more specific objectives are to:

- ▶ Create a model for development and regulation that describes and illustrates the type of tourism development that is acceptable to the stakeholders of Belize, and that will enhance the quality and increase the quantity of tourism.
- ▶ To conserve the natural and cultural assets deemed of high value by stakeholders, and which act as major attractions for tourism.
- ▶ To respond to the analysis of existing and proposed development requirements discussed elsewhere in this report by creating physical plans that respond to that direction.
- ▶ Phase tourism development so that there are opportunities in the near term and for the 20 period from now.
- ▶ Consolidate readily available or easily obtained mapped information into a format that could be used to judge how appropriately describe important resource areas, as well as viable development sites.
- ▶ To judge the appropriate development extent and intensity in each situation.
- ▶ To take a broad look at sustainability with respect to balancing the economic, natural and cultural systems and the needs of Belizeans.
- ▶ To provide a conceptual planning and land use model that considers all facets of the conservation and development mix at regional, local and project specific levels.
- ▶ To provide specific plans for four tourism destinations that shows where and how tourism development might appropriately be considered.

Implicit in these plans and studies is an underlying assumption that it is the relatively unspoiled natural and cultural resources of Belize that brings tourism to the country. Therefore, the extent and intensity of development is conservative, with a leaning to avoid completely any medium or high value resource.

Also implicit is the need to respond to the targeted tourism markets requirements for transportation, lodging, attractions, and other facilities. Of particular importance in this was to increase the diversity of experiences to enhance attractiveness to existing and future visitors to Belize. In the planning process, the objective was to determine what these elements are, to locate them physically, and to describe them in a regulatory framework.

2.2 Planning methodology

The planning methodology used for these studies was a simplified, iterative planning model. The steps included:

- ▶ **Data Gathering and Review** of existing mapped data and planning initiatives.
- ▶ **Analysis** of data on the natural and urbanized environment relevant to this planning process in suitable planning areas and destinations. The analysis included mapping constraints to development, such as high value natural areas, as well as opportunities such as vacant land in cities.
- ▶ **Modeling** of the types of development and conservation typologies that respond to the input of stakeholders and other team members.
- ▶ **Draft Master Plans** that locate different types of tourism assets and describe their characteristics and extent.
- ▶ **Final Master Plans** that respond to the review of stakeholders of the draft plans.
- ▶ **Regulatory framework** for use in implementation of the plans and to support the long term objectives of the Master Plan.

The plans that have been generated, It must be noted that mapped data of physical features proved particularly difficult to obtain. Consolidating all of the mapped data within all of the agencies in Belize would greatly enhance future tourism planning efforts and project planning.

2.3 Planning areas and destinations

In this study, a simple hierarchy of planning areas has been applied to consider country wide tourism planning issues, as well as specific destinations plans. This hierarchy is as described below.

As shown on the plan sheet, the first set of plans refers to a comprehensive explanation at country scale, they illustrate most of the issues addressed in this chapter and the main development principles to be further developed on smaller scales of work are explained as follows: *regional destinations, specific development plans, special purpose plans*

2.3.1 Regional destinations

Seven tourism regions have been identified and agreed upon to organize aspects of tourism development. These were selected because they are separate hubs based on present and potential tourism flows, existing products, natural resources, cultural resources and physical configuration.

These destinations define the regional extent of tourism products that are either currently offered and/or that could be developed. Those seven destinations shown at the map are the following and have been designated with a letter:

- A. Central Coast Belize**
- B. Northern Belize**
- C. Western Belize**
- D. South Eastern Coast Belize**

- E. Southern Belize**
- F. Northern Islands**
- G. Belize Reef.**

2.3.2 Specific development plans

Per the Brief, four specific areas will be developed in greater detail in another deliverable (Specific Development Plans – Terms of Reference Deliverable of Phase III). These include Ambergris Caye, Placencia Peninsula, Belize City Waterfront and San Ignacio. Since the development models for Placencia Peninsula and the area adjacent to the north were to differ drastically a new specific area was added to the list as Stann Creek ending up with five specific areas.

- A.S. Belize City**
- C.S. San Ignacio**
- D.S. Placencia Peninsula**
- D.S. Stann Creek**
- F.S. Ambergris Caye**

2.4 Types of tourism experiences

Regarding the types of tourism experiences that will drive growth in the sector, Belize has the potential to become a destination that offers six main types of tourism concepts, namely: Nature-based Tourism, Cultural Tourism, Cruise Tourism, Leisure and Entertainment, Nautical Tourism and Sun & Beach tourism.

Most of these experiences are available now in Belize to some extent. However, all of them need to be further developed to meet the customer's expectations and maximize their potential while minimizing negative environmental and social impacts. Doing this will result in a more sustainable future for the current resources and assets offered in Belize. Physical aspects of each of the general tourism concepts are as follows:

- ▶ **Nature-based Tourism:** is any form of tourism that relies primarily on the natural environment for its attractions or settings
- ▶ **Cultural Tourism:** is a form of special interest tourism based on the search for participation in new cultural experiences, whether they are aesthetic, intellectual, or emotional and relies primarily on heritage sites and living culture expressions.
- ▶ **Sun & Beach Tourism:** this tourism product refers to relaxation activities on or near the beach
- ▶ **Cruise Tourism:** there are two different types of cruise tourists: conventional and pocket cruises; relies on access to land and sites
- ▶ **Nautical Tourism:** It is the navigation and journeying of tourists / boaters in leisure vessels (yachts, boats, sailing, motorboat, charter boat etc.). It therefore requires marinas or boat shelters and water-based activities and sports on or off the vessel navigating in closed seas, rivers, lakes, overseas and oceans onto international waters

- ▶ **Leisure & Entertainment Tourism:** is caters to a relatively young breed of tourist, who is seeking shopping possibilities, escapism, entertainment and fun. It relies on facilities and services.

At a first stage the aim is to define their main areas of influence and the tourism assets that are involved in developing and balancing these product groups. Secondly, it is possible to define the future actions or areas of influence for each product group and where to focus attention and investments.

2.5 Considerations on the natural environment

Major tourism attractors that differentiate Belize from other Caribbean and Central American destinations are the generally unspoiled natural environment and cultural resources. The Barrier Reef and Cays of Belize, and the Mayan antiquities are world class by any standard. They are, of course, threatened by development of all sorts, as well as harmful environmental practices that often go hand-in-hand with developing economies. The issue is of central importance in developed economies as well, but in those cases resources are available to provide different solutions. In Florida, for example, where high intensity development has permanently altered the water quality of Florida Bay, the State spends \$300 million each year to acquire high value lands for conservation in addition to enforcing strict environmental codes. The simple truth is that if the Tourism Industry in Belize is to provide a long-term benefit to Belize, the natural environment must take center stage in any and all planning regimes.

There is no shortage of concern for this issue in Belize. Indeed, the ranges of studies reviewed for this report are initiated by federal agencies and NGO's as well. There is even an ordinance in place that prohibits the cutting of mangroves. However, as stated elsewhere in this report, existing practices are not consistent nor are they coordinated. Cutting of mangroves, filling of wetlands, failed or non-existent storm water management systems and agricultural practices do not reflect proper consideration of this issue.

As with land use planning, concerted and coordinated conservation of resources is a low cost, high value strategy. Generally, it does not involve high capital investment, rather legislation, rule-making and administration (much of which is already in place). It is possible for developers to fund review of proposed plans by professionals not on staff. Failure to engage in a comprehensive conservation initiative may also result in a significant loss of value.

The conservation model considers available information from existing planning initiatives, primarily the National Protected Areas Plan. It also considers the available maps of Ecosystems so that environmentally sensitive areas that may not be protected are avoided when considering new development. For example, mangrove areas are avoided, and previously disturbed areas are targeted by development. The plans aim is to protect the existing natural and cultural assets from the possible tourism impacts and new developments. When some overlapping occur also to make sure that the impacts are at least compatible with the environment, and that any the effects can be assessed and mitigated

Available mapping limited the extent and precision with which high value ecosystems were identified. Indeed, better organization of the existing data in the hands of various agencies and stakeholders is a necessary step to the next level of planning.

The graphic plan considered about ecosystems in Belize is the number 3 Ecosystems, at a national level. Other ecosystem plans overlapping destination tourism developments will be considered in the site plans of the five Specific Development Plans.

2.6 Development considerations and principles

Another major building block of the physical planning effort responds to the experiences identified elsewhere in this report that are needed to enhance and extend tourism development. As a general idea the plans in the present work convey different levels of consideration for planning the different types of development in different areas of the country, and, at different scales.

2.6.1 General development typologies

The models or typologies for development considered relate to land occupancy and the increase of tourism. The development models include the following types and intensities of areas and projects. In all of these typologies

EXISTING SETTLEMENTS

In existing towns and villages, the models that are applied are described and illustrated below.

- a) INFILL AND COMPLETION OF EXISTING TOWN/VILLAGE
- b) MODERATE GROWTH
- c) PROMOTED GROWTH

INFILL AND COMPLETION OF EXISTING TOWN/VILLAGE

The objective in settled areas such as Belize City and San Pedro are to stay within the scale of the existing development, but to fill in vacant or underutilized land to expand tourism offerings. Naturally, coastal land or lands with good views are of greatest importance.



MODERATE GROWTH

To better understand the quality and intensity of development, the photograph below shows what may be planned for infill parcels where moderate growth is considered.



PROMOTED GROWTH

Similarly, where growth is actively promoted for commercial reasons, this image shows a new development as an expansion beyond the edges of a town



NEW RESORT VILLAGES

In previously undeveloped areas, where there are minimal impacts on adjacent natural areas, the models include lodging related products and resort residential. These are illustrated below.

- d) MAINTAIN CHARACTER WITH RESORT HOTEL (very low density)
- e) NEW RESORT / TOWN (low density)
- f) NEW RESORT / TOWN (low - medium density)

MAINTAIN CHARACTER WITH RESORT HOTEL (very low density)

In high value landscapes, where limited development will have a high impact on tourism, these types of low density development may be appropriate, particularly in previously disturbed areas.



NEW RESORT / TOWN (low density)

Medium density resorts will have a sense of community, and greater densities, but nothing in excess of 3 stories.



NEW RESORT / TOWN (low - medium density)

High density areas for development may be appropriate in high value landscapes, where there is little impact on natural systems.



2.6.2 Tourism products

Considering the specialized categories for the different kind of touristic segments these development models respond directly or indirectly to all of them, as follows:

- **Nature-based Tourism.** These types of development will serve as base camps for nature tours and adventure activities, and can draw development away from the natural areas that are the primary amenity of Belize.
- **Cultural Tourism:** These types of development will also serve as base camps for tours of cultural assets, and keep development away from those resources.
- **Nautical Tourism:** This type of tourism will be based out of these resorts, as well.
- **Cruise Tourism:** These types of development are the best hope of luring cruise visitors back.
- **Leisure & Entertainment Tourism:** The lower intensity, higher quality types of development will lure this market to existing towns and new resorts. Relative levels of comfort and security are sought, but a thrill-seeking disposition may motivate the tourist to look for diverse, often fantastical experiences
- **Sun & Beach Tourism:** This product is most directly served by these development models.

2.6.3 Reference density

In judging the value and impact of development, it is necessary to quantify the amount of development that may occupy areas within destinations, or development in specific plans. The physical model of growth (height, land occupation, density of units, etc.) has been simplified and turned into density levels for destination planning. These correspond to the illustrations above. The units should be considered in a generic way as spaces accessible with a key, so it includes hotel rooms, apartments, etc.

- | | | |
|---------------------|----------------|---|
| 0. UNTOUCHED NATURE | (ref. level 0) | |
| 1. VERY LOW DENSITY | (ref. level 1) | (around 4 units/acre - 10 units/hectare) |
| 2. LOW DENSITY | (ref. level 2) | (up to 20 units/acre - 50 units/hectare) |
| 3. MEDIUM DENSITY | (ref. level 3) | (up to 40 units/acre – 100 units/hectare) |
| 4. HIGH DENSITY | (ref. level 4) | (over 60 units/acre – 150 units/hectare) |

It should be said that High Density development is rare within Belize or in the plans that have been generated. This level of intensity is only appropriate in high value locations where the opportunity for positive impacts on tourism is possible.

As to retain an image example for each of the mentioned densities:

0 . UNTOUCHED NATURE



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1. VERY LOW DENSITY



2. LOW DENSITY



3. MEDIUM DENSITY



4 . HIGH DENSITY



3 Proposed Model and Land Use Framework

This section describes the physical planning proposed model for tourism development at a country scale. It intends to provide the stakeholders and decision-makers of Belize with an overall frame useful to place and help find specific actions, actors and developers to bring added value when it comes to develop the existing tourism sector both at national and international level.

This section is coupled with a detailed land use framework (chapter 2.2) at the service of the proposed model, which defines the typologies and products planned for each of the specific sites and development plans.

As later stated in this chapter, this detailed land use framework is aimed to be initially indicative as it will need further development. Nevertheless it should turn into a regulatory frame. As explained after is form based and compared to other typical town planning works is tourism oriented.

The Land Use Framework, or regulatory framework, is based on assumptions and principles gained from the stakeholders, the guidance of the economic planners, as well as sound tourism planning practice.

3.1 Country scale model

3.1.1 Guiding principles

At meetings with stakeholders, certain basic assumptions, as well as principles that would guide all of the planning studies were determined.

The assumptions are that the country is small, but diverse in tourism offerings at a visitor-friendly scale. There is not the large-scale, high-impact development of the northern Yucatan Peninsula, and that is a great differentiator. Introducing large scale development would significantly alter the physical impression of the country, not to mention the challenges to its social and physical infrastructure. The main attractions are:

- ▶ A world-class reef/caye/atoll system that extends the length of the country's coastline
- ▶ Mayan religious monuments which are also world-class as tourism attractions
- ▶ Interior highlands clothed in jungle and laced with unspoiled rivers and cave systems.

All of the destinations are accessible by car and by air as day-trips. Though a developing country, the roads, the roadsides and most settlements and urbanized areas are well-kept. The exception is Belize City, which is neither well-maintained nor is there the perception of security.

Given these assumptions, the following guiding principles were approved, which governed the planning process from start to finish, and should continue to guide any planning done in Belize.

- ▶ Maintain the existing, human scale of urbanized areas and attractions.
- ▶ Maintain and enhance the participation of residents and visitors in the function of urbanized areas.

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- ▶ Conserve the natural resources that are the major attraction of the country. In particular, the barrier reefs – atolls – cayes system, and the mountain jungle.
- ▶ Enhance the existing tourism offerings and add new offerings with respect to lodging and attractions.
- ▶ Maintain the diversity of natural and cultural environments.
- ▶ For antiquities, conserve and enhance visitation opportunities and the experience.
- ▶ For infrastructure, remediate and enhance the urban environment with respect to health and safety.
- ▶ Limited infrastructure development in natural areas or undeveloped areas to maintain the character of these areas.
- ▶ Raise the quality (and value) of all tourism destinations and facilities.
- ▶ Use public investment to guide conservation and development. This primarily addresses access by road and by air.
- ▶ Maintain diversity of high quality tourism offerings as they are available to all visitors staying at all destinations.
- ▶ Define the edges of urbanized areas, particularly where they abut natural areas such as the sea and the jungle.
- ▶ Create regulatory regimes that emphasize consistency with existing scale and character of developed and undeveloped areas.
- ▶ Create regulatory regimes that are consistently applied.
- ▶ Fully understand the issues affecting long term environmental sustainability of the natural resources and put in place regulations to ensure that sustainability.

3.1.2 Territorial model

The country's tourism offer in terms of landscape extremes includes both experiences associated with the sea and the densely forested mountains. Probably are the coastal systems that are more exposed to tourism and receive higher numbers of visitors and thus of environmental pressure. On the other extreme the interior or outback of the country has been experience a growth but with lower numbers.

In general terms this plan tries to obtain a better balance developing all the tourism products according to the potentials of the different destinations trying to release the pressure on the coastal areas that concentrate the developments.

On the graphic section, plan number 5 is a synthesis of the national strategy of this NSTMP showing the overall picture for 2030. Growth is planned countrywide with different intensities or models for the different areas and settlements. Here is a relation of the overnight growth ratios by destination being the national average a growth of 2.88.

- ▶ Central Coast Belize: 2.92
- ▶ Northern Belize: 3.25
- ▶ Western Belize: 2.03
- ▶ South Eastern Coast Belize: 6.25
- ▶ Southern Belize: 6.12

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- ▶ Northern Islands: 1.82
- ▶ Belize Reef: 2.15

As contained in the different chapters of this NSTMP, when it comes down to the most visited or tourism developed areas the development strategies could be as follows:

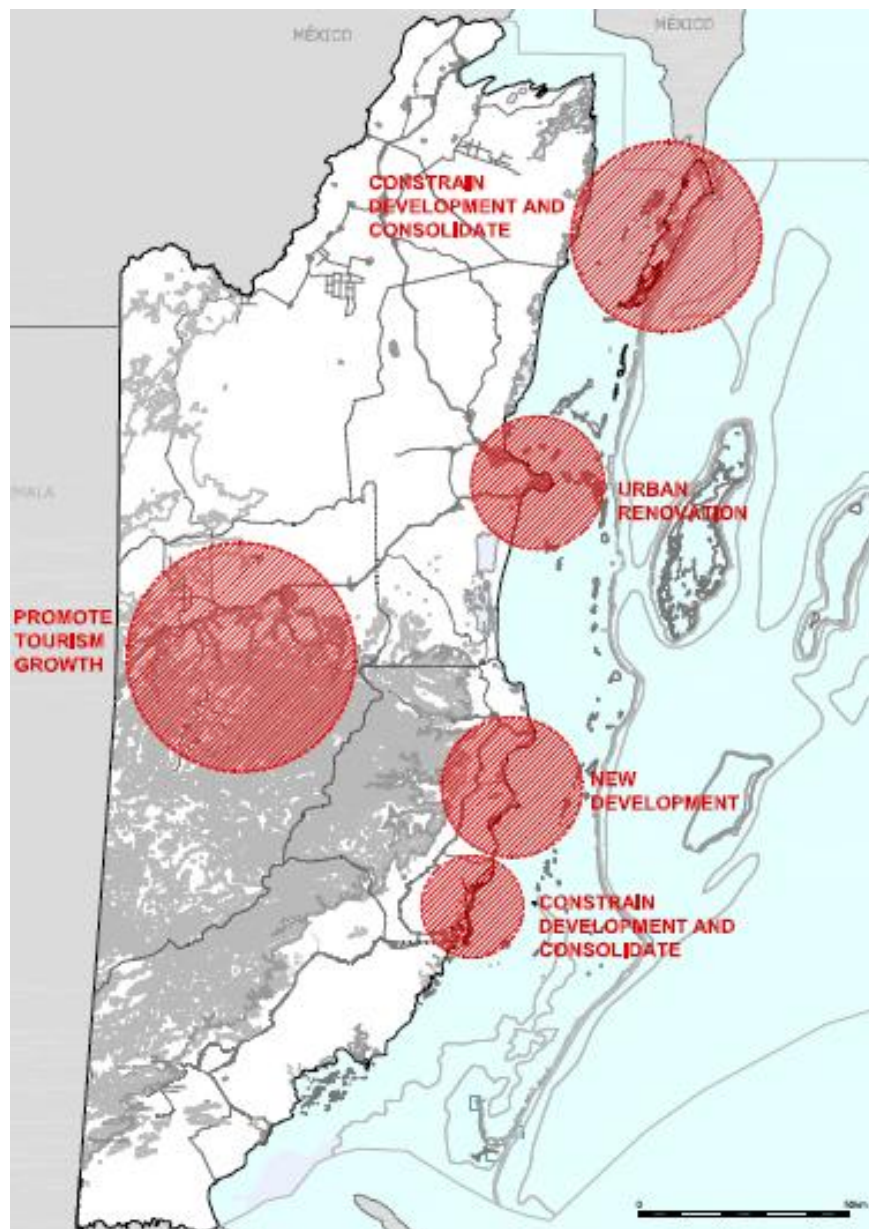
BELIZE CITY: Urban renovation

SAN IGNACIO: Promote tourism growth

PLACENCIA PENINSULA: Contain development and consolidate

STANN CREEK: New development

AMBERGRIS CAYE: Contain development and consolidate



3.2 *Land use framework*

From a tourism development perspective, there are good and bad ways to attract quality development and developers through land use planning. The good way is through:

- ▶ Clear development standards that are consistently applied
- ▶ Clear and transparent entitlement processes that provide predictability to the permitting and development process
- ▶ Unified administration of the above.

Public participation guided by good leadership working under well-coordinated planning regimes.

This Land Use Framework is a first step towards visualization and definition of these Guiding Principles for tourism related development. It can and should be used as a basis for land use planning of each of the areas designated in this study. The Framework may also be used as a basic typology for land use regulations such as; zoning for cities, towns or villages: land use plans for larger area such as districts: and special purpose plans for environmentally sensitive areas.

In the present chapter it is included a short description of the different districts and land use categories. The **Annex 3. Land Use Framework** contains the full model with all the details and parameters for each of the different specific land uses. These Districts and Specific Land uses are used in the plans to define specific areas accordingly and when appropriate.

This Framework is different than most zoning or land use typologies in that it is directed towards tourism development and conservation of tourism assets (as can be seen from designations such as "resort" and "hotel"). Also, and, it is form-based. That is, it addresses the way buildings look and interact with other buildings to form urban spaces such as plazas or squares or to have limited visual impact on natural areas. In this way, the Town/Village Center is a group of buildings that define a central square which typically functions as a central gathering place for towns in Belize. Similarly, it considers how buildings look and interact with natural areas. This will become more clear in application of the Framework to a plan, but the intention is to describe and define development that looks and feels authentic within the historical and cultural environment that is one of the pillars of tourism.

Altogether, this Framework is general in nature corresponding to the general nature of the plans in this study, and, more importantly, to the need for a readily comprehensible tool for Tourism Planning by all Stakeholders. It is not a code for zoning or land use, which will require more detailed structure to become legally binding. At the same time, this Framework is a draft, and as it is reviewed by the Stakeholders and applied to land use plans, there may be land use designations that need to be added.

The use of the Framework has two steps. First is to understand the general land use of the area or district. For this, general Land Use Districts are applied as follows:

3.3 Land Use Districts

- I. Existing Town/Village – for example, Belize City, San Pedro, San Ignacio
- II. New Town/Village Resort – for example, The Placencia
- III. Resort – such as the San Ignacio hotel
- IV. Conservation – Bacalar Chico
- V. Special Purpose Area – Ambergris Caye and Placencia Peninsula

Once the district is established, refer to specific land uses for each as listed below:

3.3.1 Specific Land Uses

I. Existing Town/Village (ETR): Enhancement or regeneration of existing, high-character villages and resorts with civic improvements and appropriately scaled tourism development.

- **Existing Town/Village (etv).** A general designation for towns, portions of cities and villages that are identified as having significant character and views, and are selected for regeneration and development for tourism.
- **Town/Village Center (tvc).** Medium density, clustered, mixed use development that serves as the central commercial area of a Village.
- **High Street Commercial (hsc).** Street organized by retail and restaurants that acts as an entertainment destination for residents and tourists
- **Leisure Destination (ld).** Single attraction for tourists and residents such as a theme park
- **Market (mkt).** Permanent site with both permanent and temporary booths selling fresh food, crafts and other items that attract visitors and tourists
- **Urban Waterfront Promenade (uwp).** Mixed use area with higher intensity commercial, residential and institutional uses oriented towards the water and a marina
- **Beach Front Destination (br).** Beach oriented retail, hotels, restaurants and bars in a linear organization along a beach that functions as circulation and for bathing and boating uses
- **Infill Residential (ir).** Residential built between existing homes at a similar scale and separation
- **Neighborhood (nh).** Multiple unit, medium density single family or multi-family development built within the urbanized area of an existing village. It may be associated with, and serviced by a hotel or guest house
- **Waterfront Residential (wr).** Single and multifamily residential on the water
- **Town / Village Hotel (h).** Village scale hospitality facility built within or contiguous with a village, at a compatible scale. May include a spa, restaurants and be attached to, or provide service to Village Residential
- **Civic (civ).** Administration, education, health care, public entertainment venues, religious and any other facility providing public services. Will be at a compatible scale and mass with the existing Village, but may service more than one Village

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- **Plazas/Parks (p).** Small, urban park surrounded by buildings and providing the Village with a central gathering places
- **Town / Village Buffer (bf).** An open space used to separate incompatible land uses, or to preserve views from a Village to high value landscapes
- **Priority Redevelopment Areas (pra).** Regeneration of urban fabric with remarkable lacks and drawbacks at present, including heritage / cultural attributes, mixed use or other elements of special interest for local people and tourists. It could include strategic empty lots with high potential for renovation.
- **Resort (r).** Existing Resort, cluster of hotel services, rooms, suites and limited serviced residential with possible restaurants and spa.

II. New Town/Village Resort (NVR): Large scale, mixed use resort community with clustered, high intensity, high quality development for tourism and resident population.

- **New Village (nv).** Large scale, mixed use resort community with clustered, high intensity, high quality development for tourism and resident populations. New Village Resorts are built to function as a destination resort, but look like a traditional village.
- **Village Center (vc).** Mid and High density, clustered urbanized area, with full mix of uses including hotels, residential, commercial and civic facilities. This will be a new centrality, as well as an attraction for the Area. New Towns may also be resort-oriented with major recreational facilities such as golf. They may also be focused on a cultural facility such as a university or research park
- **Market (mkt).** Permanent site with both permanent and temporary booths selling fresh food, crafts and other items that attract visitors and tourists
- **Leisure Destination (ld).** Single attraction for tourists and residents such as a golf course, club or theme park
- **Resort Hotel (rh).** Hospitality serving business or tourism within a Town Center. May also include Hotel Serviced Residential, a spa and some limited retail
- **Resort Villas (rv).** Single family residential development for the tourism market
- **Resort Residential (rres).** Residential development developed for the tourism market with unified architectural design and in multifamily configuration
- **Resort Reserve Residential (rr).** Very low density, conservation oriented residential area within high quality forest or agricultural area within a New Town
- **Resort Recreation (rrec).** Clustered residential area with single, or multifamily development. Will have recreational amenity such as golf or a marina, and may be connected to a Resort Hotel for service
- **Urban Waterfront Promenade (uwp).** Mixed use area with higher intensity commercial, residential and institutional uses oriented towards the water and a marina.
- **Civic (civ).** Administration, education, health care, public entertainment venues, religious and any other facility providing public services

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- **Plazas/Parks (p).** Active recreational fields and gardens connected to the Town Center or within a neighborhood
- **Buffer (bf).** Open space that serves to insulate incompatible land uses from one another
- **Green Way or Open Space (gw/os).** High value forest or agricultural area within a New Town, connected to a network of similar areas that provide trail connections to all neighborhoods

III. Resort (RT): Tourism directed hospitality, serviced residential, resort residential and recreational amenities (such as golf). Generally not large or complex enough to be a New Town/Village Resort.

- **Resort (nvr).** Tourism directed hospitality, serviced residential, resort residential and recreational amenities (such as golf). Generally not large or complex enough to be a New Town/Village Resort
- **Resort Hotel (rh).** Stand alone, cluster of hotel services, ooms, suites and limited serviced residential with restaurants and spa
- **Resort Residential (rr).** Clustered residential area with single, or multifamily development. Will have recreational amenity such as golf or a marina, and may be connected to a Resort Hotel for service
- **Resort Reserve Residential (rrr).** Very low density, conservation driven residential where homes are sited within forest, along the water or next to agriculture, but conserving the majority of land in its natural use
- **Resort Recreation (rrec).** Golf, a marina, a spa, health facility or other recreational amenity that supports the operation and value of a Resort
- **Resort Buffer (rbf).** Open space that separates two incompatible land uses

IV. Conservation (CON): High value marine, forest and agricultural areas in need of conservation. Where appropriate, accommodating very low density, conservation driven development in residences and lodges.

- **Marine low density (mld).** Marine related area with very low density residential in upland areas
- **Marine Lodge (ml).** High or medium value marine area or island within which a low density, conservation oriented lodge is located along with a spa, restaurant and nature oriented amenities
- **Marine Recreation (mrec).** Permanent or temporary facility for transient use such as picnicking, fishing or diving
- **Forest low density (fld).** High or medium value forest area within which high value homes are located so as to preserve most of the forest
- **Forest Lodge (fl).** Medium value forest area within which a low density, conservation oriented lodge is located along with a spa, restaurant and nature-oriented amenities

- **Forest Recreation (frec).** Camping, picnic or guide facility located within a Forest Preserve
- **Agriculture Preserve (agp).** High value agriculture with no development
- **Agriculture low density (agld).** High or medium value agriculture within which high value homes are located so as to preserve the agricultural operation
- **Agriculture Lodge (agl).** High or medium value agricultural area in which a low density, conservation oriented lodge is located along with a spa, restaurant and other amenities
- **Existing Protected Areas (epa).** High value environmental area, implementation of existing laws under the current system of National Protected Areas (Forest Reserve, Nature Reserve, National Park, National Monument, Wildlife Sanctuary, Marine reserve, etc).
- **Water Elements Improvement (wei).** Canals, rivers or any other water element related to urbanized areas that need special treatment or improvement of its function according leisure and recreation purposes in accordance and mitigating the impact on the natural environment.

V. Special Purpose Areas (SPA): High value natural and cultural resource areas that require a Special Purpose Plan that is based on protection of the resource and visual resource analysis. Generally, this means no development, limited or low density development.

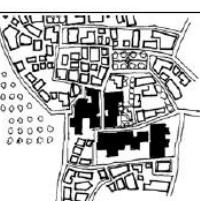

- **Special Purpose areas (spa).** High value natural and cultural resource areas that require a Special Purpose Plan that is based on protection of the resource and visual resource analysis. Generally no development or limited, low density development.
- **Antiquity (ant).** High value antiquity from Mayan, religious or other history. Special Purpose Area Plan should first consider conservation and protection of the resource, and then the quality and type of surrounding development, if any
- **Archaeological Study Area (asa).** Area with Antiquities or Cultural Resources, or believed to have Antiquities or Cultural Resources, where excavation and study is underway or planned to be underway
- **Heritage Cultural destination (hcd).** Current cultural resource, such as a church, recreation area or outdoor market and that is not an Antiquity
- **Marine Landing Area (mla).** Waterfront conservation area that may also have tourism oriented installations such as picnic areas, a dock or other leisure activity
- **Water Resource Area (wra).** Catchment area or watershed where water collects to form a stream or well field
- **Ecologically Sensitive Area (esa).** High value habitat for a mix of flora and fauna
- **Sensitive or Vulnerable Landscapes (svl).** Scenic area with high value landscapes within the viewshed of a road, village or other public facility
- **Scenic Byways (scb).** Road with views of high value landscapes, and a pleasing alignment with limited development of the margins
- **Special Places (sp).** Places designated as important to the visitors and residents of the Area

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Within the full matrix, a number of illustrations, descriptions and criteria are presented to provide an objective model for each land use. These columns include:

1. Proposed Classification. These are the names for each of the Districts and Specific Land Uses listed above.
2. Code. This is an abbreviation for each District or Specific Land Use that may be used for mapping.
3. Land Use Concept. A brief description of each land use.
4. Development or Use Plan. These are simple black and white building and space diagrams that illustrate typical arrangements in plan for each land use.
5. Image. These are photographs that show what each land use might look like.
6. Site and Design Issues. Locational, site quality issues, and design quality issues.
7. Land Use Restrictions. Conditions that do not work with the land use.
8. Estimated Minimum Land Area. The minimum amount of land generally required for the development of a land use.

The image below as a sample extract from the tables included on Annex 3 shows the look of the first 8 columns for the district *Existing Town / Village* as is has just been exposed:

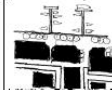
I. LAND USE DISTRICTS							
Proposed Classification	Code	Land Use Concept	Development Plan Example	Image	Site and Design Issues (location, adjacency, physical features)	Land Use Restrictions	Estimated Minimum Land Area
Existing Town/Village	ETR	An existing Town or Village, that is reorganized or enhanced to function as a living and a resort community. Each Town or Village will require a strategy for redevelopment that addresses its physical features, historic character, value for development and tourism potential.			Towns and villages will require adequate land to mix new resort facilities with existing development, enhancing urban open spaces, maintaining architectural scale and character, and creating development opportunities to fund redevelopment.	A general designation to be used for large scale land use planning prior to specific land use planning according to categories below.	25 Hectares

For Specific Land Uses, additional criteria include:

1. Permitted Uses. Land uses permitted.
2. Prohibited Uses. Land uses that are not allowed.
3. Typical Maximum Building Height. In stories, but the main criteria is to be similar to surrounding, existing land uses or to work within the context of the existing environment.
4. Typical Maximum Building Area, Coverage or FAR. The amount of building area allowed as a percentage of site area.
5. Typical Build-To Line. In places such as a High Street, it is important for buildings to be close to the street.
6. Typical Minimum Set Backs. In less urban environments, the distance between buildings is described.
7. Typical Open Space Requirement. Large scale land uses have requirements for a percentage of the land to be in open space.
8. Typical Minimum Frontage. So that the frequency of building along a street can be maintained, or access to the land use provided.
9. Typical Density per Hectare. The number of units, such as residential, per hectare.

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The image below as a sample extract from the tables included on Annex 3 shows the look of the columns from 9 to 17, for the Specific Land Use. *Urban Waterfront Destination* as is has just been exposed:

Proposed Classification	Code	Land Use Category	Development/Use Plan (Appropriation)	Image	Use and Design Issues (Residential, Commercial, Industrial, etc.)	Land Use Restrictions	Permitted Use	Prohibited Use	Typical Minimum Property Size	Typical Maximum Building Height (Feet)	Typical Maximum Building Area (Square Feet)	Typical Maximum Building Area (Square Feet)	Typical Maximum Building Area (Square Feet)	Typical Maximum Building Area (Square Feet)	Typical Maximum Building Area (Square Feet)	Typical Maximum Building Area (Square Feet)	Typical Maximum Building Area (Square Feet)
Urban Waterfront Destination	UWD	Urban Waterfront Destination	Urban Waterfront Destination		Use includes urban and commercial with high density residential and commercial and associated infrastructure. Urban Waterfront Destination is a waterfront area with high density residential and commercial and associated infrastructure.	Urban Waterfront Destination is a waterfront area with high density residential and commercial and associated infrastructure.	Urban Waterfront Destination is a waterfront area with high density residential and commercial and associated infrastructure.	Urban Waterfront Destination is a waterfront area with high density residential and commercial and associated infrastructure.	Urban Waterfront Destination is a waterfront area with high density residential and commercial and associated infrastructure.	Urban Waterfront Destination is a waterfront area with high density residential and commercial and associated infrastructure.	Urban Waterfront Destination is a waterfront area with high density residential and commercial and associated infrastructure.	Urban Waterfront Destination is a waterfront area with high density residential and commercial and associated infrastructure.	Urban Waterfront Destination is a waterfront area with high density residential and commercial and associated infrastructure.	Urban Waterfront Destination is a waterfront area with high density residential and commercial and associated infrastructure.	Urban Waterfront Destination is a waterfront area with high density residential and commercial and associated infrastructure.	Urban Waterfront Destination is a waterfront area with high density residential and commercial and associated infrastructure.	Urban Waterfront Destination is a waterfront area with high density residential and commercial and associated infrastructure.

Together, this information will be an adequate description for each area on the plans for specific areas, as well as a foundation for all manner of land use planning regimes.

As previously stated the full information of the Land Use framework it is included on the **Annex 3. Land Use Framework** In this master plan. Each of the five districts has been placed in a different page.

Besides, the NSTMP for Belize includes one more annex regarding land use and environmental strategies (see **Annex 2. Land Use Strategies**).

4 Destinations

As explained on chapter 1.3, seven tourism regions have been identified and agreed upon to organize aspects of tourism development. These were selected because they are separate hubs based on present and potential tourism flows, existing products, natural resources, cultural resources and physical configuration.

These destinations define the regional extent of tourism products that are either currently offered and/or that could be developed. Those seven destinations shown at the map are the following and have been designated with a letter:

- A. Central Coast Belize**
- B. Northern Belize**
- C. Western Belize**
- D. South Eastern Coast Belize**
- E. Southern Belize**
- F. Northern Islands**
- G. Belize Reef.**

Before focusing on each of the destinations later in this chapter (sections 3.2. to 3.8.) we start with an overall picture of the country (section 3.1.)

4.1 Country layout

On the graphic section of this Master Plan, the maps at a country scale are placed in the beginning and are designated with a number, whereas the maps on the different destinations within the country are designated with a letter from “A” to “G”.

Objectives

Objectives for conservation and development include:

- ▶ Keep the existing values using a strategy based on conservation
- ▶ Base the developments on principles of sustainability such as compact nuclei and promotion of energy efficiency technologies
- ▶ Balance and improve the existing tourism products and attractions reducing the impact on the natural environment
- ▶ Generate new products so as to increase the Tourism offer
- ▶ Turn the cruise ship visitor industry into a positive impact to the tourism sector by benefiting of the high numbers of visitors that brings.

Proposals

Tourism development model for Belize- National level (2030)	
Development	High value/low impact
Density	1 – 2 – 3
Overnights (2030)	5.895.376
Overnight growth (2010 – 2030)	2,88
Hotel rooms (2030)	13.754
New hotel rooms (2010 – 2030)	6.869



MODEL OF DEVELOPMENT

The model has been exposed on section 2 on the chapter *Territorial Model*.

In general terms the plan tries to obtain a better balance developing all the tourism products according to the potentials of the different destinations.

- Growth for **Central Coast Belize** is planned to be very closed to the national average as it already has a bigger offer in terms of quantity.
- **Northern Belize** is planned with a growth just over the average but for this destination it supposes a major growth since the number of visits is more limited at present
- **Western Belize** is planned with a sustained growth targeting smaller facilities or eco-lodges with very low density and higher segments of the market
- **South Eastern Coast Belize** has the biggest growth in the plan since the proposal is a new development on part of the coastline in order to focus the investments nationwide and allow conservation of the other destination within the country and Placencia Peninsula just to the south.
- **Southern Belize** is planned with a very big growth in terms of the growth ratio. In this case the ratio is not a good indicator since the current number of rooms is extremely low compare to the other destinations and the size of Punta Gorda.

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- For **Northern Islands** the growth ratio is below the average since Ambergris Caye is at the limit of its carrying capacity and there is a big number of empty compounds and unfinished constructions that should be reconverted according to the needs.
- **Belize Reef** is slightly below the average but in this case again the quantity of room at present is very low

REFERENCE DENSITY

As described in section 1 of this plan, depending on the specific area, the density varies ranging generally from level 1 up to level 3. Level 0 is also part of the proposed reference density of this plan, including all the areas where there is not any proposed intervention or growth.

Level 4 has been discarded as being rare in the country and considered inappropriate for the quality standards and the long term benefits for Belize.

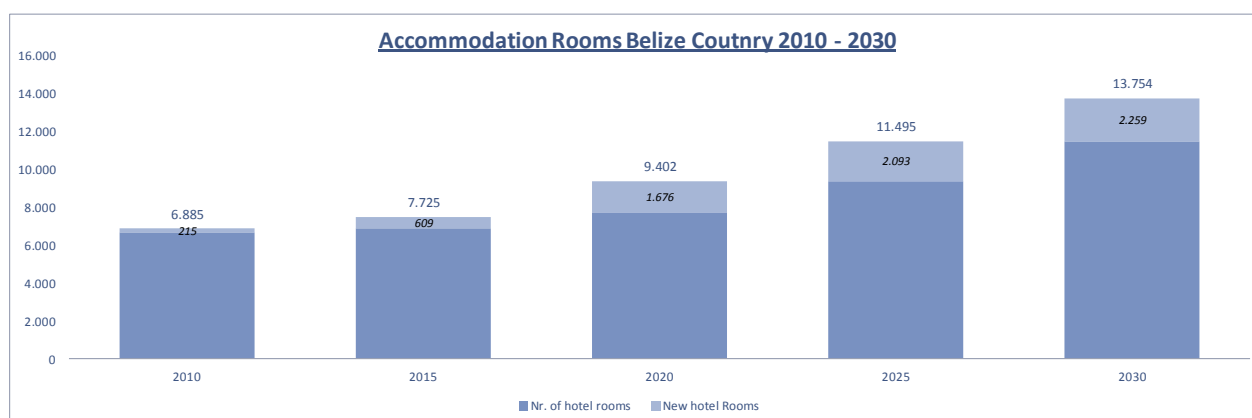
Predominant densities countrywide are 1 and 2, as these compose most of the human scale landscape in the country. As for level 3, it is only applied to very specific dense areas. These areas are either:

- ▶ bigger cities (Belize City or San Ignacio)
- ▶ middle size towns that currently have a very limited tourism offer (Punta Gorda)
- ▶ areas proposed for new developments from scratch (north from Riversdale at Stann Creek)
- ▶ L&E are to be develop in Corozal District where big growth has already been happening

ACCOMMODATION GROWTH MODEL

By 2030, Belize's tourism accommodation sector is expected to hold a total of 13,754 hotel rooms of which at least 70% should be classified between mid to high-end luxury for international standards.

In phase I of the NSTMP, from 2011 to 2020, the target is to develop 2,517 new hotel rooms. In phase II, from 2011 and 2030, the intensity of new hotel room development is to increase and a further 4,352, reaching a total of 6,869 new hotel rooms by 2030. Hence from the total new tourist accommodation rooms, 36.6% will be built phase I and 63.4% in phase II with a compound average growth rate CAGR of 3.7%. New rooms projections shown in the table below:



The total number of new rooms refers to those that would be built in the time interval of previous five years
Source: T&L, 2011.

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Between 2012 and 2014, new hotel accommodation projects are recommended to be defined. During these first years, developers should search for the most adequate operators and investors. Special focus is suggested to be given to the research and attraction of international hotel brands especially for Belize City. Meanwhile, country wide incentives are recommended to be provided to the hotel and accommodation sector for the restoration, embellishment and modernization of the existing tourism lodging facilities. Some colonial heritage could be converted into hotels and boutique hotels. In some destinations, the presence of condominiums is regarded to be ineffective for the destination's sustainable economic growth. Therefore, T&L suggest assessing the possibilities of restructuring these into hotels and/or serviced accommodation facilities. All destinations are scheduled to experience considerable hotel development growth, except one. Belize Reef is mostly expected to be structured as day visitation destination rather than overnight tourism; hence it will only develop very few additional accommodations between 2025 and 2030.

As shown in the previous graph, T&L used the official occupancy rates and calculated overnights generated by destination. Based on the official number of tourism accommodation facilities (2010: 6,885 rooms) the sector is expected to close to double in new hotel room development by 2030 in order support the expected tourism overnight growth.

However, before intense hotel development can be foreseen an in-depth analysis and statistical database on Belize's quantity and international quality standards of the tourism accommodation sector needs to be introduced. Additionally, a crucial tool for accommodation development is the classification and monitoring of Belize's hotel and accommodation sector

TOURISM PRODUCTS

The main tourism products are selected strategic product concepts for the development of the country; they have been selected based on their competitiveness-importance-attractiveness from a long list of options. They are main tourism motivations that encompass many tourism activities under their product portfolio such as diving, sports fishing, caving, and temple hopping, among others. The product development concepts for Belize are as follows:

- ▶ **The Nature-based Tourism** organizes Belize's ecotourism and adventure tourism products into a system of themed natural and man-made nature-tourism concepts structured into integrated recreational ecotourism and adventure sites and centers. In addition, it designs diverse nature-based themed routes and trails, such as the National Nature Tourism Trail System and a National Caving Trail System, catering to the interests and needs of different niche segments. It encompasses both inland and water based nature recreation and adventure activities all over the country.
- ▶ **The Cultural Tourism** product concept focuses on the development of cultural heritage and living culture sub-products. Its flagship creation is the development on a National Museum of Anthropology that will be strategically located in San Ignacio town. It defines the integral development Mayan Heritage sites as a homogeneous tourism concept for all Mayan archaeological sites. Additionally it focuses on the creation of a link of *enchanted villages* with a charming Belizean style appeal, rural tourism sites and routes and temporal tourism attractions such as traditional markets, festivals and themed programs. It focuses on archeological heritage sites and living culture expressions across Belize.
- ▶ **The Sun & Beach Tourism** suggests the integral development of sun & beach resort areas, pristine beaches and waterfront experiences in strategic locations of the coast of Belize and reef islands, namely South Eastern Coast, in Southern Coast, Northern Islands and reef islands. North Riversdale in south eastern coast of Stann creek and Punta Negra in southern coast should be highlighted as new promoted and development locations including this product.

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- ▶ **The Cruise Tourism** aims to structure Belize city and surrounding destination tourism assets as a structured and well managed set of attractive facilities and sites, such as Belize city waterfront experience and embellishment of Belize city colonial heritage neighborhoods, with an interactive welcome center in the Fort George area. Additionally, it introduces the pocket cruise (small cruise vessel) model as a viable option for cruise visitation for Southern Coast Belize.
- ▶ **The Nautical Tourism** structures a system of marinas, ports and services aimed at attracting tourist journeying in vessels (yachts, sail boats, boats, charter boats) across the Caribbean to come to Belize. Additionally, it aims to support the creation of yacht and sail clubs that link with international clubs and attract loyal customers.
- ▶ **Leisure and Entertainment** concept is associated to a mid to high shopping and entertainment destination as it will have fully developed an attractive open-air mid-high end shopping center hosting brand names, restaurants, cafes, bars and entertainment facilities. The target area of development is in Corozal envisioned to be highly accessible by land, boat and border crossing. In a second order the concept is to be adapted and implemented in Belize City and San Pedro.

4.2 Central Coast Belize

Central Coast Belize Destination is identified to be day-visitor destination mostly visited by cruise ship passengers and an overnight destination due to the location of the international airport, and the recreational debarkation/embarkation landing. This landing area receives over 300,000 cruise passengers a year, and is also the landing for coastal ferries as well as nautical tours and water taxis.

By 2030 Central Coast Belize will be dominated by a vibrant tourism Belize City with a combination of preserved colonial heritage architecture and modern entertainment facility. Will host brand name hotels as well as traditional style boutique hotels, for a growing overnight tourism market and various facilities for cruise and yacht and sail clubs. It will be the main hub for conventional cruise arrivals that will benefit from Belize's City cultural offering as well as sourcing nature based tourism motivations and links to other destinations.

On the graphic section of this Master Plan, the maps for this destination are designated with letter "A".

Objectives

Objectives for conservation and development include:

- ▶ Redevelop Belize City Waterfront including cruise landing / departure area and marina facilities
- ▶ Completion and urban renovation of Belize City Historic District
- ▶ Improve essential infrastructures and services to promote Belize City as an overnight destination
- ▶ Renovate, enhance access and increase the tourism attractors and services to consolidate the existing and potential flows both in the city and outside the city
- ▶ Development of a new cruise port facility to support expected increase cruise visitor arrivals

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Proposals

Tourism development model for Central Coast Belize (2030)	
Development	Infill
Density	3
Overnights (2030)	897.376
Overnight growth (2010 – 2030)	2,92
Hotel rooms (2030)	2.026
New hotel rooms (2010 – 2030)	1.039



MODEL OF DEVELOPMENT

As for the development model there is a specific strategy for Belize City explained in more detail in section 4. The approach in terms of physical planning is to focus on urban renovation of the Central Historic District neighborhood, where at present tourism related activities do happen. The icon on the maps thus designates infill and completion of the existing town / village.

Is around the Historic district and on the north side of Haulover Creek and the waterfront where we can find most of the hotels, other accommodation formulas, the cruise landing and departure areas and most of the tourism attractors in the city (museum, restaurants, Fort George street village, water taxis, boat regular services, fishermen, open air market, casino, etc.)

The master plan proposes also to develop a very low density resort around Lamanai archeological site since it is one of the most visited attractions of the country. Considering the existing natural environment, the complex should be design maintaining the existing character.

According to what it has been said about Lamanai, the proposals for the archaeological sites should include, in limited areas, the possibility to build high quality lodging because general land use areas generate revenues that can contribute with fees to maintenance

REFERENCE DENSITY

As described in section 1 in this document, the planned densities for the projects to develop is up to level 3 (30 to 40 units per acre) for Belize city since the central areas of the larger cities need concentration, density and a good mix of uses to generate diversity and maintain the economic activities and attractions for tourism.

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As for the infill projects within old urban fabrics such as the old historic center with British period wooden houses around the museum and the municipality should not exceed the density or height of the neighboring buildings or blocks. For the symbolic or specific sites such the ones on the waterfront the density can be increased up to the maximum of level 3 as mentioned

The reference density for the proposed very low density resort around Lamanai is level 1, ranging from 1 to 4 units per acre

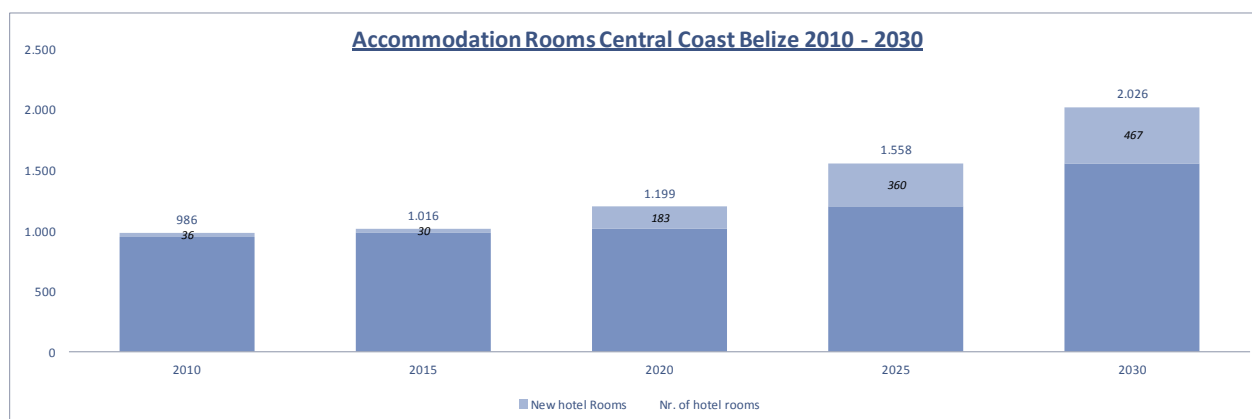
- ▶ Level 1 (around 4 units/acre - 10 units/hectare): Lamanai archeological site
- ▶ Level 3 (up to 40 units/acre – 100 units/hectare): Belize City

ACCOMMODATION GROWTH MODEL

Central Coast Belize's tourism accommodation development is expected to develop 1,039 new hotels rooms by 2030. It is expected start with the opening of 30 new hotel rooms in 2015. No additional hotels are recommended to be introduced before 2015, in order to maintain the occupancy rate on a healthy growth path.

From 2012 to 2020, Central Coast Belize will develop 212 new hotel rooms and a further 827 from 2021 until 2030, reaching a total of 1,039 new hotel rooms between 2012 and 2030.

Between 2012 and 2014, new hotel accommodation projects are recommended to be defined. During these first years, developers should search for the most adequate operators and investors. Special focus is suggested to be given to the research and attraction of international hotel brands in Belize City. Meanwhile, special incentives are recommended to be provided to the hotel and accommodation sector for the restoration, embellishment and modernization of the existing tourism lodging facilities. Some colonial heritage could be converted into hotels and boutique hotels.



The total number of new rooms refers to those that would be built in the time interval of previous five years
Source: T&L, 2011.

TOURISM PRODUCTS

Cultural tourism and Cruise tourism are the two main tourism products identified for Central Coast Belize; hence these will be the main motivation for travelling to the destination. **Nautical tourism, Nature-based tourism and Leisure & Entertainment** tourism are regarded to be secondary tourism motivations.

Main tourism products

- ▶ **Cultural Tourism** is suggested to be offered with **mid-high quality** facilities and infrastructure. The planning will introduce the Integral Development of Mayan sites Concept at Altun Ha and further focuses on Belize City's cultural tourism development (restoration of colonial heritage architecture, revitalization of historic sites, etc.). These modifications will disperse the tourism flows into wider area of the city and destination, and provide enhanced local participation in tourism.
- ▶ **Cruise Tourism** is a crucial tourism product which directly affects Belize City and its surrounding areas. It is recommended to offer cruise tourism as a **mid quality** product and improve its management and visitor flows. In particular, visited attractions are of great concern in terms of the environmental impact of the increased volume of cruise ship passengers visiting. Based on this, visited sites require a carrying capacity assessment and visitor management plans which can be implemented and laws that can be enforced.

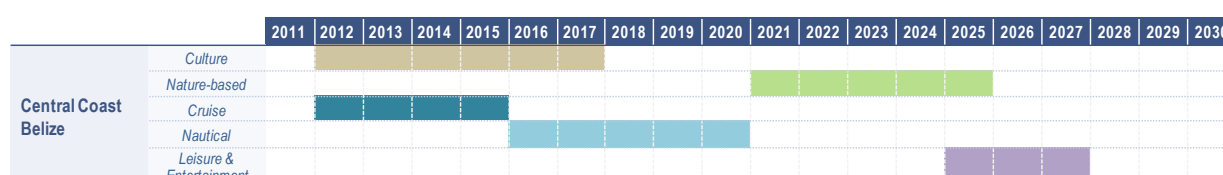
On behalf of cruise tourism, Belize City will undergo great urban changes and remodeling of the Fort George Terminal, the wider area of the terminal, a new entertainment area including a waterfront experience, the embellishment of Belize River and its surrounding houses and renovated bridges to further access southern parts of the city. A second cruise port facility is expected in order to accommodate the growing sector.

Furthermore, the infrastructures at dedicated cruise tourism destinations, sites, attractions and activities in order to cater for large tourism crowds (such as in Northern Belize – Lamanai and Altun Ha) will be developed.

Secondary tourism products

- ▶ Central Coast Belize's **nature-based tourism** product consists of the developing ecotourism activities such as bird-watching sites such as Northern and Southern Lagoon and to develop further man-made facilities to diversify the nature-based activities local offer.
- ▶ **Nautical Tourism:** water recreational activities should be developed by offering **high-mid tourism products**, facilities and infrastructure. With regard to the consideration of developing a marina for small boats, it is not feasible to develop it at the Salt Creek and the Midwinter Lagoon. However, recommended sites for the development of marinas are directly located in Belize City. The development will introduce new overnight-docking marinas attracting small yachts and sailing boats along with mix development use offering.
- ▶ A smaller version of the **Leisure & Entertainment Tourism** concept is suggested to be presented in Belize City, in the form of an attractive and concentrated area for mid/high end shopping, edutainment and entertainment that caters to market segment that visits Belize City as well as local demand.

Central Coast Belize will first implement projects to improve the current situation of cruise tourism and execute actions to enhance the cruise visitor's experience. Cultural tourism development is expected to start at the same time with restoration and embellishing of the city. Nautical tourism facilities is to be developed on a third order, whereas nature-based and L&E are concepts to be developed in the second phase of the NSTMP.



4.3 Northern Belize

By 2030 in this region we find easy access to a prosperous Corozal town hosting a mid-high end Leisure & Entertainment center. Additionally, in Orange walk district will be benefiting from rural tourism activities and the integrated development of Mayan Heritage sites. More cross border movement will be promoted with the diversity of offering in the following border regions:

- ▶ **Corozal:** Will be established as a mid-to-high shopping and entertainment destination as it will have fully developed an attractive open-air mid-high end shopping center hosting well-known brands, restaurants, cafes, bars and entertainment facilities such as casinos, theaters, and bowling alleys, among others. The area will have good access by land, boat and border crossings. As a secondary motivation it will host cultural and nature tourism product offering such as Shipstern Nature Reserve, Corozal Bay, Sarteneja and the manatees.
- ▶ **Orange Walk:** The destination will be hosting diversified cultural heritage, living traditions and nature based eco-tourism products with high involvement of local rural communities. It will cater to a well managed cruise visitors market while establishing a growing overnight sector.

On the graphic section of this Master Plan, the maps for this destination are designated with letter “B”.

Objectives

Objectives for conservation and development include:

- ▶ Promote the rich cultural and natural sites on the north, facilitating access and creating specific products such as visits to the Mennonites compounds
- ▶ Consolidate and increase accommodation offer to boost Corozal and Orange Walk overnight stay tourism
- ▶ Promote the growth and develop L&E facilities expanding the existing ones or planning new spaces

Proposals

Tourism development model for Northern Belize (2030)	
Development	Infill/ moderate/ growth
Density	1 – 2 – 3
Overnights (2030)	651.310
Overnight growth (2010 – 2030)	3,25
Hotel rooms (2030)	1.583
New hotel rooms (2010 – 2030)	1.040



MODEL OF DEVELOPMENT

As for the development model the idea is to encourage a moderate growth both for Orange Walk and Corozal, considered as base camp areas for visitors discovering the neighboring attractions and thus to increase the overnight in both towns.

Complementary to Corozal and especially around the nature-based product, the model for infill and completion of empty lands inside the towns is planned for Chunox and Sarteneja. Therefore the growth in extension should be focused on the edges of Corozal.

As being one of the goals for the destination to attract regional boarder cross movement, the promoted growth icon is proposed for an L&E area, which could be considered a re-launching of the free trade zone. Although not always completely urbanized, the street layout has been already determined. This implies there is a big potential for growth differed in time to complete the net, provided a new gate strategy and enclosure is designed.

As previously mentioned for Central Coast Belize the plan proposes also to develop a very low density resort around Lamanai archeological site since it is one of the most visited attractions in the country.

REFERENCE DENSITY

As described in section 1 in this document, the planned densities for the projects to develop is up to level 3 (30 to 40 units per acre) for Belize city since the central areas of the larger cities need concentration, density and a good mix of uses to generate diversity and maintain the economic activities and attractions for tourism.

As for the infill projects within old urban fabrics such as the old historic center with British period wooden houses around the museum and the municipality should not exceed the density or height of the neighboring buildings or blocks. For the symbolic or specific sites such the ones on the waterfront the density can be increased up to the maximum of level 3 as mentioned

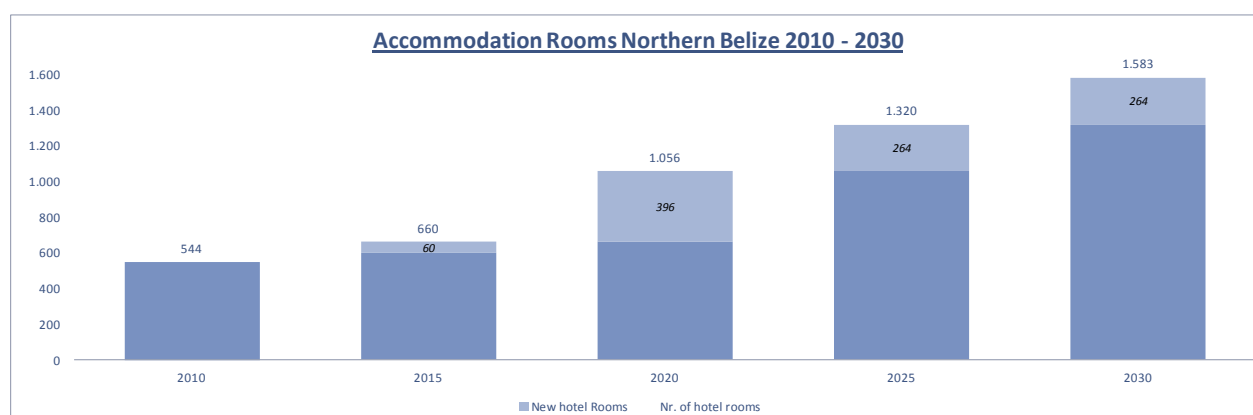
The reference density for the proposed very low density resort around Lamanai is level 1, ranging from 1 to 4 units per acre

- ▶ Level 1 (around 4 units/acre - 10 units/hectare) : Lamanai archeological site
- ▶ Level 2 (up to 20 units/acre - 50 units/ hectare): Orange Walk, Corozal, Chunox, Sarteneja
- ▶ Level 3 (up to 40 units/acre – 100 units/hectare): L&E Zone (Corozal)

ACCOMMODATION GROWTH MODEL

- ▶ From 2012 to 2020, Northern Belize will develop 512 new hotel rooms, followed by an extra 528 from 2021 until 2030, hence reaching up to a total of 1,040 new hotel rooms between 2012 and 2030.
- ▶ Starting in 2012, Northern Belize will foster the development of accommodation facilities in rural areas, especially in participating rural communities such as the Mennonite communities. 116 rural tourism accommodation facilities will be inaugurated between 2013 and 2015.
- ▶ Between 2015 and 2019, Corozal's Leisure & Entertainment Area is suggested to be planned, developed, its investors and operators sought, etc. From 2020 to 2030, approximately 923 new rooms are scheduled to be initiated in Northern Belize, mainly for the support of leisure & entertainment tourism products.

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The total number of new rooms refers to those that would be built in the time interval of previous five years
Source: T&L, 2011.

TOURISM PRODUCTS

Two main tourism products were identified for Northern Belize: **Leisure and Entertainment, and Cruise Tourism**. **Nature-based Tourism and Cultural Tourism** are regarded to be secondary tourism products.

Main tourism products

- ▶ In regards to **Cruise Tourism**, Northern Belize should offer those day visitors standard quality tourism assets and products. A further suggested cruise tourist destination, besides Lamanai, could be Cuello – an archaeological site which is currently underdeveloped. The program suggests the development of infrastructures at dedicated cruise tourism destinations, sites, attractions and activities in order to cater for large tourism crowds especially in Lamanai and Altun Ha.
- ▶ The **Leisure and Entertainment Tourism Development** focuses on structuring the destination or Northern Belize as an attractive and mid-high end shopping and entertainment point for Belizeans, regional visitors and international foreigners. If it were to be developed in the Free Trade Zone the area should improve its physical appearance, in terms of quality of products offered, and regulations in order to reduce social problems, such as criminality in terms of alcohol and drug abuse, human trafficking and prostitution. In particular, the presence and development of casinos are claimed to give Northern Belize a poor destination image

Secondary tourism products

- ▶ Northern Belize offers great potential for **cultural tourism**, living culture and cultural heritage. Living culture would offer traditional life and expressions as a part of a tourism content development strategy for Northern Belize: e.g. Mestizo Culinary Festival, Traditional markets, Music Festivals, "A day in the life of a Maya", etc."

There are a few Maya sites, e.g. Chan Chich and La Mila, which have not been further excavated and would require rehabilitation and further development in order to be promoted. A **mid-class quality of cultural tourism** in Northern Belize is recommended.

In addition, cultural tourism in Northern Belize has the opportunity to be extended to agricultural/rural tourism involving Mennonite communities, such as Blue Creek, Spanish Lookout (Cayo District), Shipyard and Little Belize. Major industries are the sugar sector (sugar cane fields, sugar processing factories) and the rum industry amongst others.

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Cultural Tourism in Northern Belize is planned to include rural tourism at Mennonite and Mestizo communities and man-made facilities showcasing local productions such as sugar cane and rum.

- ▶ In Northern Belize, **Nature-based Tourism** should be offered to a **mid-high quality** scale and could include eco-tourism activities in the areas of Rio Bravo, Gallong Jug and the New River corridor to Northern Belize as prime tourism destinations.

Northern Belize will concentrate in its first development phase to enhance the impacts generated from cruise tourism by structuring the sites and their infrastructure for larger groups. Simultaneously, Northern Belize will start defining its cultural tourism mix, harnessing Belize's living cultures and rural tourism opportunities. Although, Northern Belize's leisure and entertainment tourism product is identified to be the most economically rentable tourism product, it is scheduled to be start its master planning and developed only by 2018. This later development stage is mainly due to the fact, that leisure and entertainment is regarded to be a product of third priority on the national tourism development agenda and that it will complement the destination cultural and nature-based tourism offer. However, first legal and juridical regulations and guidelines will be elaborated in a first stage in contemplation of assuring the concepts implementation.

		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Northern Belize	Culture																				
	Nature-based																				
	Cruise																				
	Leisure and Entertainment																				

4.4 Western Belize

In western Belize by 2030 we will find a San Ignacio town to be a demand driver itself hosting a state of the art welcome center, National Archeological Museum and charming village setting. The surrounding areas will have numerous nature and heritage trail systems and conceptualized adventure activities and facilities that are nurtured by demand driven from the high profile attractions such as Caracol and ATM cave systems.

On the graphic section of this Master Plan, the maps for this destination are designated with letter "C".

Objectives

Objectives for conservation and development include:

- ▶ Increase overnight facilities will add to the economy of the region as well as balance the pressure on the coastal areas for lodging access to this region.
- ▶ Promote infill projects to help complete the empty brown fields within the urban fabric of San Ignacio
- ▶ Improve accessibility form International airport, Belize city and the rest of main tourism destinations around the country.
- ▶ As the destination, the assets and accommodation facilities are geographically very disperse, create a central tourist information area offering leisure and activities to promote the brand and offer information. This would naturally be San Ignacio.
- ▶ Promote the destination of San Ignacio to become the "Adventure Capital of Belize"

Proposals

Tourism development model for Western Belize (2030)	
Development	Moderate
Density	2 – 3
Overnights (2030)	989.084
Overnight growth (2010 – 2030)	2,03
Hotel rooms (2030)	2.129
New hotel rooms (2010 – 2030)	1.101



MODEL OF DEVELOPMENT

Considering this is a national master plan that aims to provide conceptual guidelines for the development and an indicative framework it is very imprecise to establish the exact location for the new developments in a destination like San Ignacio where the accommodation facilities and attractions for tourists are dispersed around San Ignacio but in a vast area.

Taking that into consideration the proposals for models of development consider to define moderate growth both for Benque Viejo and San Ignacio. Especially in the case of San Ignacio the growth in extension should be understood as something that happens punctually around its vicinity but without necessarily implying that there is an urban continuum that leads to a compact city.

As for the attractors south from San Ignacio, Rio Frio caves, Pine Ridge and the forest area the NSTMP plans a low density new resort / town on the area known as Douglas Da Silva. The site had been previously disturbed because there used to be an economic activity. Therefore there is no need for forest clearance. There are already some constructions and an old airstrip.

The plan proposes to increase the visits and hotel rooms in Cayo, since it needs more critical mass to achieve and maintain quality standards and to support tourism related business development including shops and restaurants. As it is the focus of one of the two main landscape experiences of the country (mountains, rainforest) as opposed to the coastal destination including the reef, cayes, they need to be combined. It needs to have an airstrip within the city or in its vicinity to reduce access times and to be able to offer packages combining for example Ambergris and Placencia with San Ignacio. Time access from Belmopan airport is over 40min and is not feasible from Belize City.

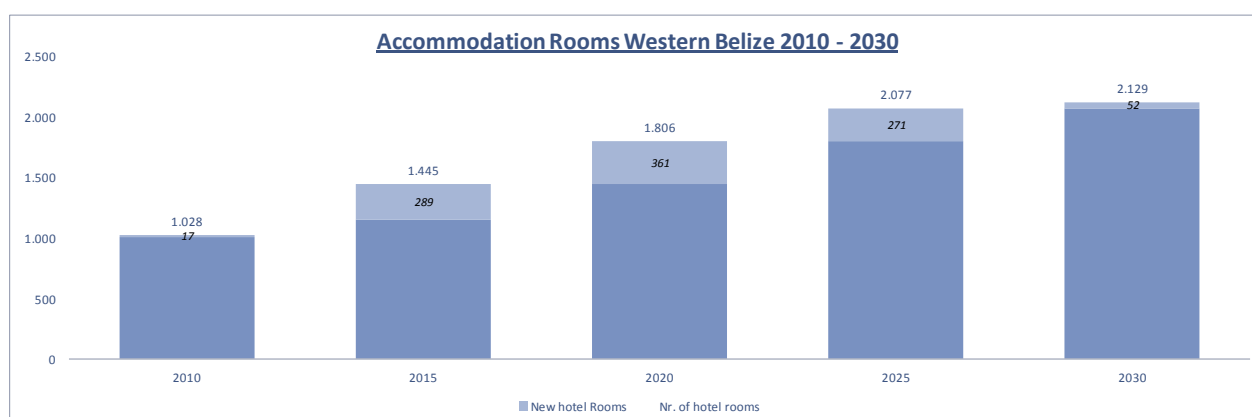
REFERENCE DENSITY

- ▶ Level 1 (around 4 units/acre - 10 units/hectare) : New eco-lodges around Cayo
- ▶ Level 2 (up to 20 units/acre - 50 units/hectare): Benque Viejo, Douglas da Silva site
- ▶ Level 3 (up to 40 units/acre – 100 units/hectare): San Ignacio

ACCOMMODATION GROWTH MODEL

From 2012 to 2020, Western Belize will develop 778 new hotel rooms and 323 from 2021 until 2030, reaching a total of 1,101 new hotel rooms between 2011 and 2030. Those accommodations could be located within San Ignacio Town and along the destination's nature trails and themed routes.

Western Belize will consolidate its major accommodation developments by 2015, with the opening of 289 lodging rooms. From then onwards, only a few eco-lodges/resorts with an approximately 50 to 60 rooms on average will be included in the destination.



The total number of new rooms refers to those that would be built in the time interval of previous five years
Source: T&L, 2011.

TOURISM PRODUCTS

This Destination is based on **cultural** and **nature-based** products grouped around San Ignacio and Santa Elena. As the second city of the country San Ignacio aims to be the “adventure capital of Belize”.

Main tourism products

- ▶ **Cultural Tourism** in Cayo District is recommended to be offered as a **high-mid quality scale** tourism product, based on its rich cultural heritage of Mayan cultures focusing on the destination's unique assets such as Caracol and the ATM cave.

This destination's development will include a remodeling of San Ignacio town, and the introduction of man-made facilities (such as National Museum of Anthropology, a Welcome Center and a traditional market) to diversify the local cultural tourism product and make San Ignacio itself a pole of attraction.

- ▶ **Ecotourism and Adventure Tourism** is recommended to be a **mid-high quality** product in Cayo District. During the first year of Western Belize's nature-based tourism development, the master planning for the sights will include themed natural and man-made nature-based

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concepts structured into integrated recreational ecotourism and adventure sites. An eco-tourism and adventure welcome and interpretation center is planned for San Ignacio. In addition, it will host diverse nature-based themed routes and trails, such as the National Nature Tourism Trail System and a National Caving Trail System, catering to the interests and needs of different niche segments. Unique Natural tourism assets, such as the ATM cave, caves branch system, Pine Ridge forest reserve will be commercialized under well managed sustainable development guidelines

Starting by 2012, Western Belize is strengthened to undertake its nature-based and cultural tourism projects. This high priority development is due to the fact that both the destination and the two products were identified to represent a high importance on a national basis.

		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Western Belize	Nature-based																				
	Culture																				

4.5 South Eastern Coast Belize

This distinctive destination will be hosting a chain of mid to low density sun & beach resorts, a chain of charming villages such as Placencia, Hopkins and Dangriga along with pristine and attractive beaches. This area will host mid-high end markets drawn by sun & beach, marine life and rainforest motivations; as well as it will become the main hub for nautical tourism development and the first to attract the pocket cruise market

On the graphic section of this Master Plan, the maps for this destination are designated with letter "D".

Objectives

Objectives for conservation and development include:

- ▶ Do not develop cruise ship tourism on Placencia itself, but rather limit the cruise tourist arrivals to the minimal extent in deference to the idea of developing it outside the peninsula.
- ▶ Limit the development at Placencia Lagoon to protect Placencia Peninsula and its sensitive and vulnerable eco-system primarily the extensive mangrove habitat.
- ▶ Ban any new big development projects in the area of Placencia Peninsula and encourage coastline development further north from Riversdale in the Stann Creek district.
- ▶ Develop new sustainable tourism oriented town and resorts in a compact nuclei avoiding dispersion and minimizing impacts on natural environment
- ▶ Required tourism facilities and basic infrastructure (such as wastewater treatment in Placencia) should be provided before attracting further tourists and start operating the airport
- ▶ Avoid negative social impacts on local population such as dislocating local people for tourism development losing the authenticity of the destination
- ▶ Institute clear standards and policies for conservation of the natural environment to guide the scale and impact of development

Proposals

Tourism development model for South Eastern Coast Belize (2030)	
Development	Infill/ low impact/ moderate
Density	1 – 2 – 3
Overnights (2030)	1.752.230
Overnight growth (2010 – 2030)	6,25
Hotel rooms (2030)	4.292
New hotel rooms (2010 – 2030)	3.000



MODEL OF DEVELOPMENT

South Eastern Coast Belize destination includes Placencia Peninsula and a coastline that are one of the most highly sensitive natural ecosystems within Belize. At the same time there is at present an increasing pressure from the real estate sector to develop the area at fast pace working on the expectations raised by the ongoing construction of an international airport nearby.

Given the confronting interests and the fact that the potential development of the destination has not occurred yet the Master Plans has chosen to define a “sacrifice zone” where to concentrate most of the new future developments.

The idea of the proposal for the destination would allow:

- Preservation of most of the coastline and specially the Peninsula from out of scale development
- Conservation of a very fragile ecosystem that makes the place an attraction
- Focus growth around existing settlements
- Release the pressure from real estate sector in other areas of the country

In this sense the new development, north of Riversdale up to Hopkins, is the place to limit the impacts of pocket cruise tourism. However, the Lagoon should be exempt from this. No high or mid density of development in Placencia, neither in the north.

So for the new developments the icon with the highest intensity considered in this work that Belize can assume has been planned for part of the coastline close to the airport and just north from Riversdale.

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South from Dangriga and Hopkins on previously disturbed areas with existing constructions, the model envisaged is for low density new resort / town. The same model has been considered for the built up areas just south from Riversdale at the very top of the peninsula.

For the existing settlements in Placencia Peninsula, Riversdale, Seine Bight and Placencia village, the model is infill and completion of existing towns.

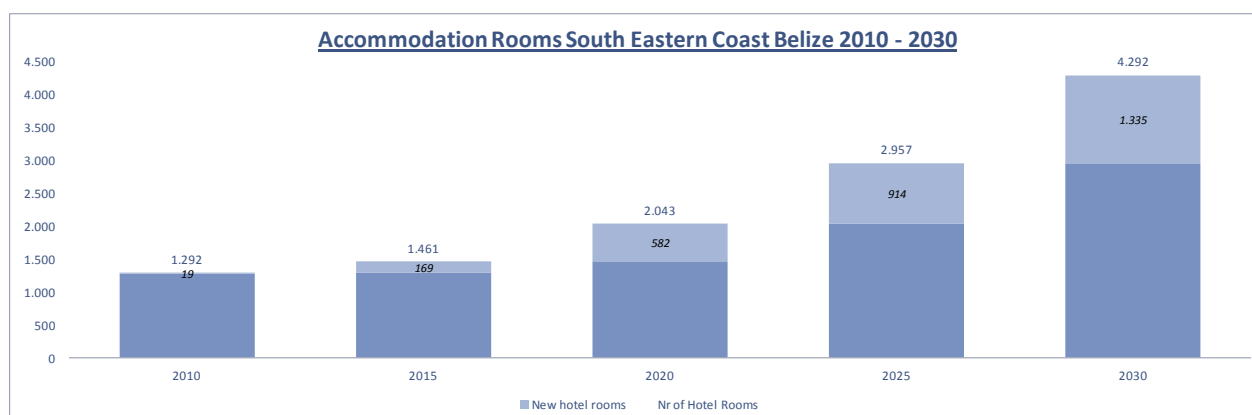
REFERENCE DENSITY

- ▶ Level 1 (around 4 units/acre - 10 units/hectare) : All Placencia Peninsula, False Sittee point and around the point (south Hopkins), Commerce Bight area (south Dangriga)
- ▶ Level 2 (up to 20 units/acre - 50 units/ hectare): Dangriga, Hopkins, North of Maya King river up to Sapodilla lagoon
- ▶ Level 3 (up to 40 units/acre – 100 units/hectare): North from Riversdale and south from Maya King river

ACCOMMODATION GROWTH MODEL

South Eastern Coast Belize will handle two different development scenarios, namely in Placencia Peninsula and in the “new development area” between Riverdales and Hopkins.

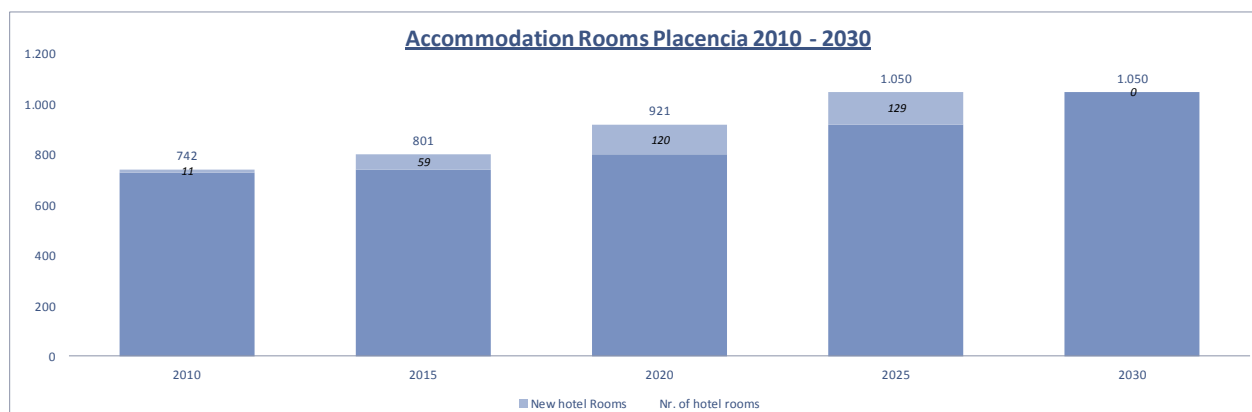
In total, South Eastern Coast Belize will develop 751 new hotel rooms from 2012 to 2020, and an additional 2,249 from 2021 until 2030, making up a total of 3,000 new hotel rooms between 2012 and 2030. Placencia Peninsula receiving only 10% of these new rooms allocation.



*The total number of new rooms refers to those that would be built in the time interval of previous five years
Source: T&L, 2011.*

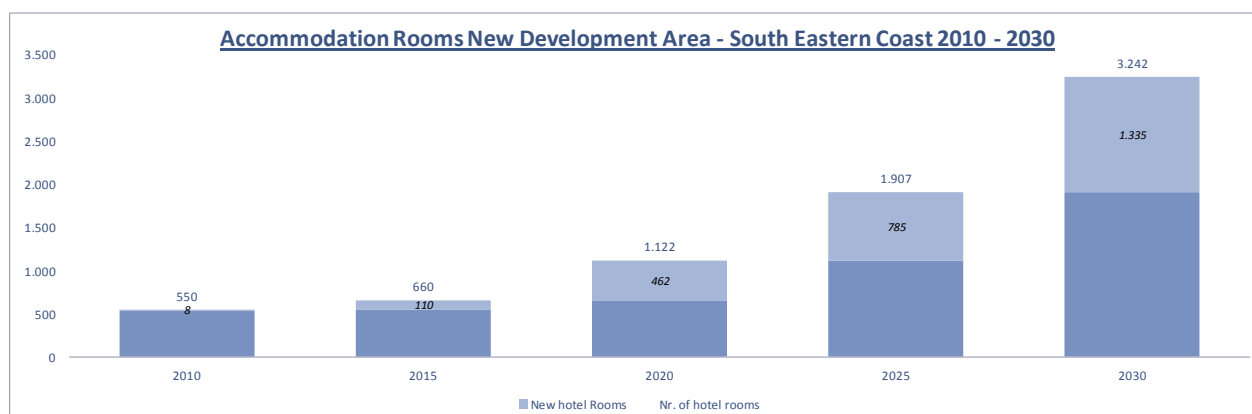
Given that vulnerabilities of Placencia Peninsula the development model is to constrain development and consolidate few new hotel rooms beyond what is already in construction today will be built. In the first phase of the NSTMP effort should be invested in developing and allocate special incentives for the restoration, embellishment and modernization of existing tourism accommodation facilities. By 2025, Placencia Peninsula will built up to 308 new room facilities and reach its stage of accommodation saturation (no further rooms should be built).

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The total number of new rooms refers to those that would be built in the time interval of previous five years
Source: T&L, 2011.

Before the end of 2011, the **new development area** (between Riverdale and Hopkins) is suggested to start to be master planned, designed and tendered for investors/operators. In particular, the task of searching for new developers, investors and operators is expected to last far beyond 2030. However, the first development of high-end, mid-density beach resorts will be inaugurated in 2015 and will increase strongly until 2030.



The total number of new rooms refers to those that would be built in the time interval of previous five years
Source: T&L, 2011

TOURISM PRODUCTS

There are five different tourism products suggested for South Eastern Coast Belize, of which Sun and Beach Tourism and Nautical Tourism will be the main drivers to the destination (hence the main tourism products) and Culture Tourism, Ecotourism and Adventure Tourism, and Cruise Tourism which will be the destination's secondary tourism products.

Main tourism products

- ▶ **Sun and Beach Tourism** should be offered as a **high quality** product and would require environmental education and awareness programs for local civil society in order to be able to maintain this product sustainably. However, in order to accommodate the product with a medium-high quality, the existing products should require further improvements and development. Pristine beaches development concept will be introduced to enhance the Sun & Beach tourism that is already experienced in the Placencia Peninsula, as it is the most dominant tourism product of the peninsula and a renowned destination in Belize for this kind of tourism product.

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The Sun & Beach Tourism product development will be launched by 2012 with its first integrated destination development master planning in South Eastern Coast Belize (Riversdale to Dangriga) intended to convert it into an exciting destination complementing the sun & beach tourism offer with water-based & rainforest activities and living culture experiences. The South Eastern Coast Belize development is expected to last beyond 2030.

The main asset of the sun & beach tourism product – the beaches – will be structured into natural relaxation zones offering water-based activities. In addition the development provides a strong emphasis on the establishment, conservation and preservation of the beaches' pristine quality standards and safety regulations for which they will be internationally promoted and known for. Furthermore, the program suggests the development of integrated waterfront experiences in main tourism hubs.

- ▶ **Nautical Tourism** should be offered as a **high quality** product that should consider the protection of the sensitive coral reef area. The Nautical Tourism Development Program will develop the tourism product starting with its introduction in South Eastern Coast Belize. The nautical tourism concept will initiate its development in Belize by 2012 in Placencia and in the area of the new development by master planning the marinas as starting and arrival point of a Belize ocean yachting and sailing experience.

Secondary tourism products

- ▶ **Pocket Cruise tourism** is the only acceptable form of cruise tourism in South Eastern Coast Belize. Pocket Cruises cater to a maximum of 300 passengers and is generally a niche and high quality market. In order to avoid further environmental degradation and exclusion of local tour operators it must be managed properly, and sites must include the usage of a strong visitor management plan and its mandatory enforcement. The program suggests the development of pocket cruise tourism product in the area of the new development. Furthermore, the program develops the infrastructures at dedicated cruise tourism destinations, sites, attractions and activities in order to cater for large tourism crowds.

Conventional Cruise Tourism is not suitable for the Placencia Peninsula given the area's sensitiveness to the infrastructure developments required for accommodating conventional Cruise Tourism.

- ▶ **Culture Tourism** is recommended to be focused on the living Mayan and Garifuna cultural expressions, traditional life and enchanting villages. Local communities should benefit from the economic development of tourism and offering should be structured to meet **mid-high quality** standards.
- ▶ **Ecotourism and Adventure Tourism** should meet **mid-high quality** standards and attract cultural and environmentally friendly tourists. South Eastern Coast Belize will be the third destination to strengthen its nature-based tourism product. This mostly includes development of activity based man-made facilities and the development of tourism projects at natural areas (i.e. Cockscomb Basin Wildlife Sanctuary and linkage to coral reef).

South Eastern Coast Belize will start with its tourism products that have already been launched and that require specific guidelines and regulations in order to undertake a sustainable path of sun & beach, cruise and nautical tourism development in the destination. However, although cruise tourism is not a priority for the destination, it is regarded to be a challenging issue which needs to be addressed by developing safeguards mechanisms in order to prevent the destination's degradation.

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		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
South Eastern Coast	Culture																				
	Sun and Beach																				
	Nature-based																				
	Nautical																				
	Cruise																				

4.6 Southern Belize

Southern Belize destination is anchored by Punta Gorda, and enhanced by the attraction of undeveloped, extensive, mountainous jungle to the west. By 2030 this area will be known to be highly attractive to hard adventure travelers and eco- travelers for its unspoiled nature allure, conceptualized adventure travel sports activities and facilities and community tourism attractions. In a second order it will be a sun & beach and nautical tourism spot for those attracted to a more secluded area.

On the graphic section of this Master Plan, the maps for this destination are designated with letter “E”.

Objectives

Objectives for conservation and development include:

- ▶ Promote Nautical Tourism in Punta Gorda and the coastline
- ▶ Improvement of International pier (BMA)
- ▶ Slightly increase tourism accommodation using empty land on Punta Gorda central city area
- ▶ Enhance the access to the natural areas to the west and north, planning a limited development based on the conservation of the underlying resource.
- ▶ In the towns, organize and improve public spaces to improve urban functions, and to enhance tourism facilities
- ▶ Create new tourism attractions around the agro tourism and rural tourism using the cacao plantations

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Proposals



The total number of new rooms refers to those that would be built in the time interval of previous five years
Source: T&L, 2011.

MODEL OF DEVELOPMENT

For the existing settlements the bulk of the new development considered in the Master Plan (new hotel rooms included on the objectives chapter) is to be placed in Punta Gorda. The model of development planned is therefore moderate growth.

Being one of the main proposals to develop nautical tourism, an infill and completion strategy has been defined for Barranco.

Considering the new developments, on one side, a new resort/town (low density) is planned for Punta Negra and, on the other side a very low density resort hotel and a visitor center are planned on the crossroads of southern highway and the road to San Antonio and Santa Cruz.

As a general frame the proposals related to the Natural Protected Areas could include, in limited areas, the possibility to build high quality lodging because general land use areas generate revenues that can contribute with fees to maintenance

REFERENCE DENSITY

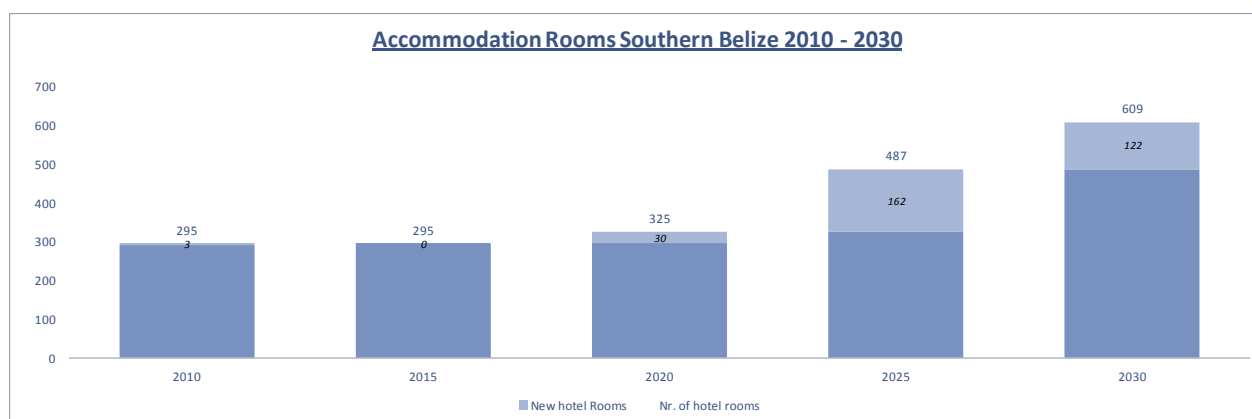
- ▶ Level 1 (around 4 units/acre - 10 units/hectare) : Barranco and Punta Negra
- ▶ Level 2 (up to 20 units/acre - 50 units/ hectare): crossroad point between Southern Highway and road to Santa Cruz
- ▶ Level 3 (up to 40 units/acre – 100 units/hectare): Punta Gorda

ACCOMMODATION GROWTH MODEL

From 2015 to 2020, Southern Belize will develop 30 new hotel rooms, as well as an additional 284 from 2021 until 2030, hence adding up to a total of 313 new hotel rooms hence doubling the number of hotel rooms available today by 2030. Additionally, this means that only very few hotels are need to be developed before 2020. Any tourism accommodation development before 2015 should be prohibited, as they would endanger the local occupancy rate and would jeopardize the hotel and tourism accommodation sector.

In the period comprised between 2020 until 2030, the destination could launch 20 additional hotel room facilities on average per year. Some of the said facilities are recommended to be devoted to special nature-based and sun & beach-tourism accommodation.

Meanwhile, the existing facilities are recommended to be provided with incentives and subsidies so as to encourage renovation, modernization and raising the facilities' attractiveness in order to increase their capacities, quality and competitiveness.



The total number of new rooms refers to those that would be built in the time interval of previous five years
Source: T&L, 2011

TOURISM PRODUCTS

It is suggested that Southern Belize should host **four tourism products**, namely **Cultural Tourism**, **Ecotourism** and **Adventure Tourism** which will be the main tourism products attracting most tourists to the destination and **Sun and Beach Tourism** and **Nautical Tourism** which will be the secondary tourism products.

Main tourism products

- ▶ **Cultural Tourism** should be given major consideration based on the diversity of the local cultures and hence should be integrated into the Tourism Master Plan as a main product for Southern Belize. This proposal is due to various festivals being organized throughout the year in Southern Belize by different communities such as Garifuna and Maya. Cultural Tourism in Southern Belize should be offered to a **medium-low quality**.

Southern Belize's cultural tourism development will require the Integral Development of Mayan sites Concept implementation, cultural trails/themed routes, and diversify its tourism offer by enhancing its living culture and agro-tourism portfolio (promotion of cultural festivals, a home-stay network, traditional markets, agro-tourism activities such as cacao and coffee plantations).

- ▶ **Ecotourism and Adventure Tourism** is suggested to offer **high-mid quality** tourism facilities and services in Southern Belize, and could include activities eco-tourism activities

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such as bird watching and river tours and adventure activities such as kayaking, diving, snorkeling, etc. Nature-based tourism in Southern Belize will design and develop the local routes and trails through the nature reserves, and develop man-made facilities hosting adventure experiences in Belize's southern areas.

Secondary tourism products

- ▶ **Sun and Beach Tourism** is recommended to be offered to meet **mid quality** standards. The destination's sun and beach tourism will require an integral development including low density beach resorts, product specific activities and facilities. Furthermore, the program suggests the development of integrated waterfront experiences in the Punta Gorda area.
- ▶ **Nautical Tourism** is selected for inclusion at **mid-high quality** standards. The "Port of Honduras" location is especially recommended for the development of a marina; and further nautical tourism facilities should be developed with a mid-density development. Additionally, a port facility next to Punta Gorda should be developed.

Southern Belize will start both its soft development for nature-based and cultural tourism development by 2013 which will mostly include research, policy development, capacity building, licensing of tourism suppliers. By 2015, the hard development will start by conceptualizing, structuring, developing and promoting its product mix. Nautical tourism will be developed prior to sun and beach tourism in order to complete the national system of marina and nautical tourism.

		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Southern Belize	Culture																				
	Nature-based																				
	Sun and Beach																				
	Nautical																				

4.7 Northern Islands

The Northern Islands destination is the core of natural and nautical tourism at its most diverse. At the same time, settlement is anchored by one of the highest character towns in the Caribbean – San Pedro. Here, in particular, the rich natural and cultural environment of San Pedro, is particularly sensitive and vulnerable to development. As the main islands it includes Ambergris Caye, Caye Caulker, Caye Chapel and all the other small islands and cays within the range.

By 2030 San Pedro will be regarded as a charming and attractive destination including a vibrant town with walk-able and attractive waterfront experience where beaches can be enjoyed and the water scenery is unobstructed. Caye Caulker continues to offer a low-key charm along with attractive beaches and a cultural offering. Both destinations cater to a mainly nature based niche product and nautical and sun & beach on a second order.

On the graphic section of this Master Plan, the maps for this destination are designated with letter "F".

Objectives

Objectives for conservation and development include:

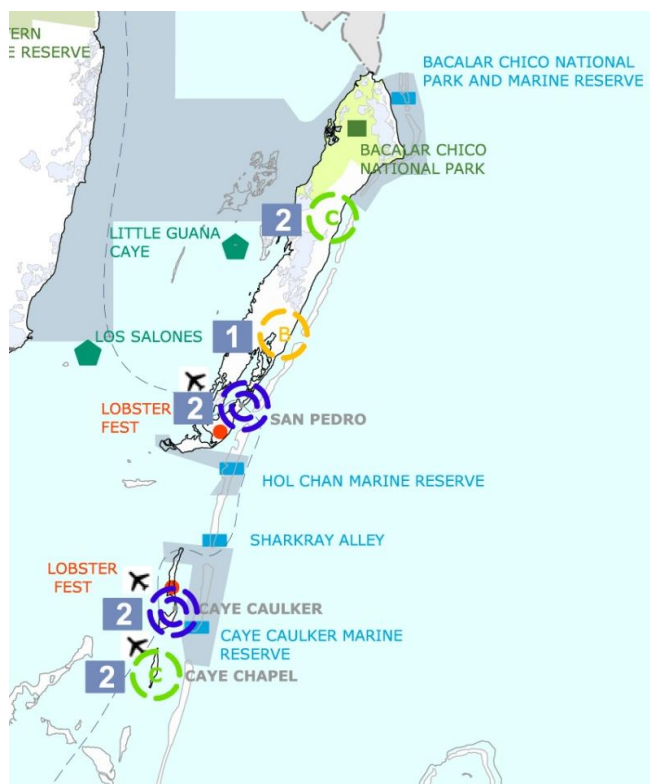
- ▶ Development must be limited by impacts to the natural environment. Conservation of this is central to the long term success of this Destination

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- ▶ Ban accommodation facility's development in the southern and northern most ends of the island as these areas should be reserved for residential or preserved areas and only receive day-visits from tourism.
- ▶ Do not allow density development above 40 units per acre on the Northern Islands. Very low impact, but very high quality development in existing natural areas
- ▶ Protect from development the wetlands and mangrove areas, as they are of utmost importance to keep the eco-system.
- ▶ Protect from development Bacalar Chico Marine Reserve. The sole development which should be authorized should be the required facilities such as a visitor center, a museum and restaurant facilities.

Proposals

Tourism development model for Northern Islands (2030)	
Development	Infill/ low impact
Density	1 – 2
Overnights (2030)	1.209.224
Overnight growth (2010 – 2030)	1,82
Hotel rooms (2030)	2.726
New hotel rooms (2010 – 2030)	338



MODEL OF DEVELOPMENT

In terms of development the conceptual principle for the northern islands destination is to constrain the development and consolidate and improve what it has already been built.

Keeping in mind the mentioned idea, both the existing settlements in Caye Caulker and Ambergris Caye are defined as infill and completion of existing town / village. The case of San Pedro is further developed in the following sections of this document.

For the proposed 338 new hotel rooms two different strategies are put in place. On the north tip of Ambergris Caye three very low density resort hotels are planned outside from Bacalar Chico National Park. In order to minimize the impacts on the environment the areas chosen have been previously disturbed.

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On second place the plan proposes some small low density new developments off the main road leading north and after the bridge north from San Pedro. The idea is to complete some of the areas that have already been recently urbanized. As commented on section 4 for Ambergris Caye this study proposes to develop studies to convert into hotel units the empty apartments or unfinished compounds built around the main road north from San Pedro.

REFERENCE DENSITY

- ▶ Level 1 (around 4 units/acre - 10 units/hectare) : New developments north of San Pedro
- ▶ Level 2 (up to 20 units/acre - 50 units/ hectare): San Pedro, Caye Caulker, 3 designated areas north Ambergris Caye

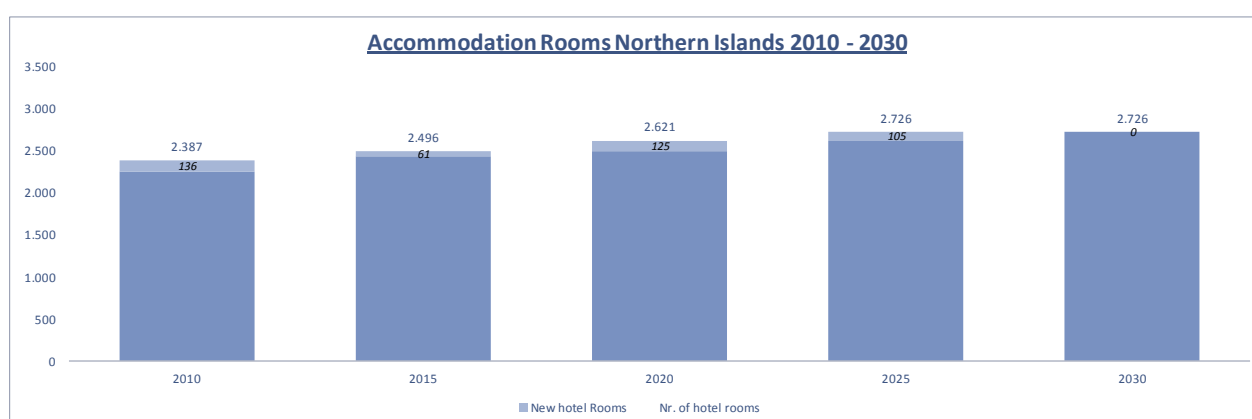
ACCOMMODATION GROWTH MODEL

From 2012 to 2020, the Northern Islands will see the development of 233 new hotel rooms and a further 105 from 2021 until 2030, adding up to a total of 338 new hotel rooms by 2030.

In order to maintain the occupancy rate on a positive growth track, no additional hotels should be introduced until 2013. These few years are recommended to be devoted to the development and distribution of special incentives for the restoration, embellishment and modernization of the existing tourism accommodation facilities.

In addition, a series of operational strategies are recommended to be identified in order to convert condominiums into hotel facilities or condo-hotels. This strategy was identified as especially Ambergris Caye's tourism industry experiences distress with condominium being empty for long periods at times and tourists who use them do not consume additional tourism services.

The first new hotels and resorts in the Northern Islands are recommended to open in 2014. The main developments are to open in 2015 and 2020 given that, mainly serving as a complement to the sun & beach resorts of the destination and northern area low-density luxury developments. From 2025 onwards, only few hotels/hotel rooms with low density will be introduced.



The total number of new rooms refers to those that would be built in the time interval of previous five years
Source: T&L, 2011.

TOURISM PRODUCTS

It is suggested that Northern Islands should host **four tourism products**, namely **Cultural Tourism, Nautical Tourism, Ecotourism and Adventure Tourism**, and **Sun and Beach Tourism**.

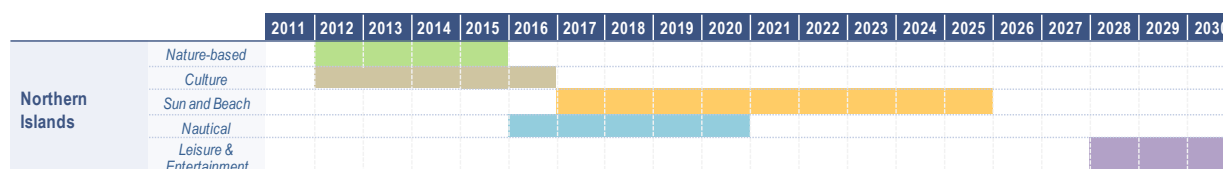
Main tourism products

- ▶ **Nautical Tourism** should be offered as a **high-mid quality tourism product** with centralized pier facilities and services. In order to control nautical tourism, there should be a regulation setting speed limits for high-speed boats.
- ▶ **Ecotourism and Adventure Tourism** in Northern Islands which consists of the enhanced development of a living reef welcome/interpretation center and further structuring of the offering conducted within the Bacalar Chico National Park.
- ▶ **Sun and Beach Tourism** is currently not well developed in the destination, and should meet the standards of a **high-mid quality product**. The development will focus on remodeling the existing condominiums into mid/high end luxury sun & beach resorts. The main asset of the sun & beach tourism product – the beaches – will be structured into natural relaxation zones offering water-based activities. In addition the development provides a strong emphasis on the establishment, conservation and preservation of the beaches' pristine quality standards and safety regulations for which they will be internationally promoted and known for. Furthermore, the program suggests the development of integrated waterfront experiences in main tourism hubs.

Secondary tourism products

- ▶ **Cultural Tourism** is recommended to be offered to a **high-mid quality** and showcase the Belizean culture of the island. Cultural tourism awareness program should be introduced to civil society as tourism already shows traces of influencing the local cultures, especially amongst youth. Northern Islands is developing its cultural tourism portfolio (Integral Development of Mayan sites Concept development, San Pedro embellishment and façade renovation; improvement of existing hotels and resorts; creation of new cultural festivals itineraries, etc.).
- ▶ A smaller version of the **Leisure & Entertainment Tourism** concept is suggested to be presented in San Pedro, in the form of an attractive and concentrated area for mid end shopping, edutainment and entertainment that caters to market segment that visits San Pedro as well as local demand

Northern Islands starts planning and developing its nautical tourism product before its sun & beach tourism product. This phasing is based on the identification, that Northern Islands is identified as an active ecotourism and nature-based tourism destination complemented by sun & beach tourism's offer.



4.8 Belize Reef

The Offshore Belize destination, and the Barrier Reef on which it is anchored, is one of the most distinctive and world class attractions – *the other two being the Mayan antiquities and mountainous jungles.*

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This unique chain reef islands by 2030 will be renowned internationally for its world heritage status and will be regarded by visitors as pristine and preserved destination. Caters mainly to day visitors and niche markets in a second order hosts exclusive sun & beach low density resorts and nautical tourism facilities.

On the graphic section of this Master Plan, the maps for this destination are designated with letter “G”.

Objectives

As such, conservation is key, and development completely subservient in quality and extent. The main objective is to limit growth, only allowing it for necessary improvements to existing homes, resorts, lodges and other facilities. Preservation of the Barrier Reef and all other marine habitats should be the primary concern when assessing any alterations to these.

Proposals

Tourism development model for Belize Reef (2030)	
Development	Low impact
Density	1
Overnights (2030)	147.783
Overnight growth (2010 – 2030)	2,15
Hotel rooms (2030)	389
New hotel rooms (2010 – 2030)	37



MODEL OF DEVELOPMENT

Only allow improvements and small enlargements for existing tourism facilities to complete maximum growth allocated of 37 new hotel room.

The proposed strategy for conservation is to establish and promote a day visitation formula.

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REFERENCE DENSITY

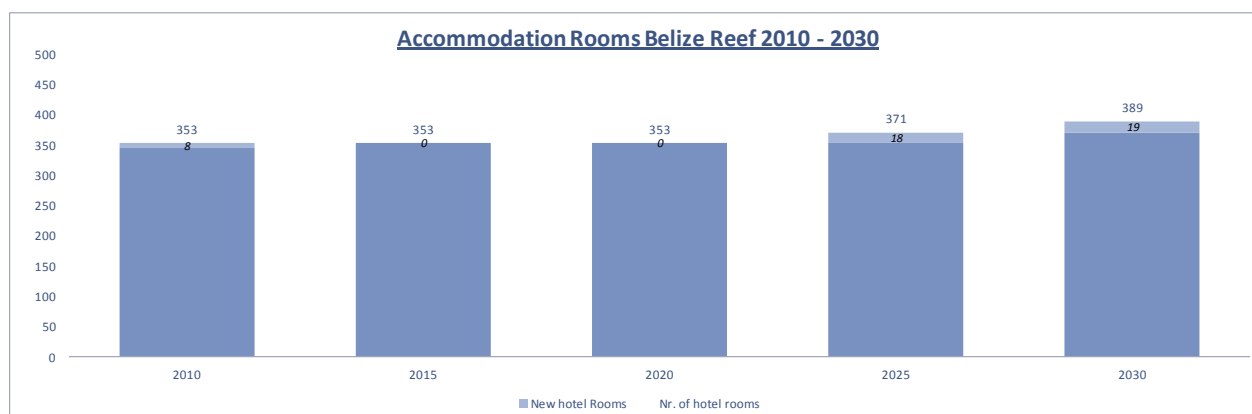
There are not indications on the graphic plans since there is no development proposed for new resorts or hotels. As it has been said the idea is to operate by extending the existing facilities in the same manner. Therefore the reference densities anywhere on the destination are level 0 or 1 only.

- ▶ Level 0: all the destination, except what is considered as level 1
- ▶ Level 1 (around 4 units/acre - 10 units/hectare): extension of existing resorts

ACCOMMODATION GROWTH MODEL

From 2012 to 2020, Belize Reef should not develop any additional hotel accommodation rooms. Existing facilities should be encouraged to restructure their offerings for day visitor activities. New development should not be promoted, as they would eventually become detrimental to the occupancy rates and the existing accommodation businesses.

From 2025 until 2030, Belize Reef could develop 37 new accommodation rooms in low density facilities. New investments are recommended to be made in facilities devoted to nautical, sun & beach and nature-based activities.



The total number of new rooms refers to those that would be built in the time interval of previous five years
Source: T&L, 2011.

TOURISM PRODUCTS

There are three main tourism products in Belize Reef, namely nature-based tourism and nautical tourism which will be the main motivation for tourists to visit the destination and sun & beach as a secondary tourism motivation.

Main tourism products

- ▶ **Nature-based Tourism:** Belize Reef's nature-based tourism product mostly includes water-based activities and tourism services structured around them to cater to the needs of day visitors.
- ▶ **Nautical Tourism:** Offering anchorage points, small marinas and docking stations.

Secondary tourism products

- ▶ **Sun & Beach Tourism:** Belize Reef should develop a few resorts and sun & beach tourism assets/activities.

All three tourism products should be offered to a **high quality** standard.

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Belize Reef was identified to remain as long as possible a natural and generally untouched destination, which will mostly develop water-based day visitor attractions and enhance its nautical tourism product. Only at a later stage, Belize Reef will start developing its low density sun & beach tourism product.

		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Belize Reef	Nature-based																				
	Sun and Beach																				
	Nautical																				

5 ANNEX 2: LAND USE STRATEGIES

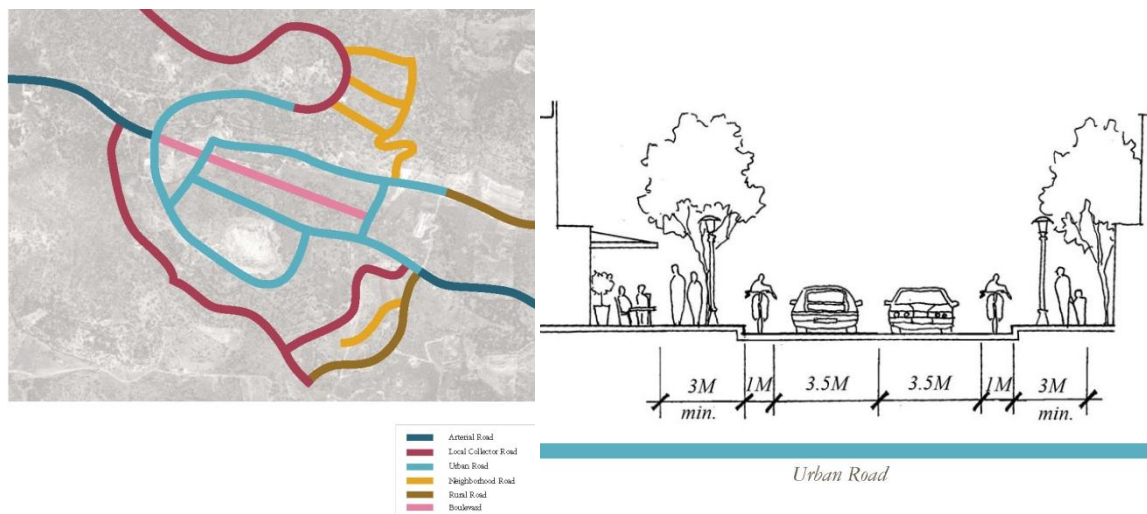
5.1 OTHER LAND USE STRATEGIES

5.1.1 Next Steps

As mentioned above, this Land Use Framework will clearly describe the intended development of each of the area plans in this study. However, it can also serve as the basis of a number of land use regimes applied under different jurisdictions and agencies. These include:

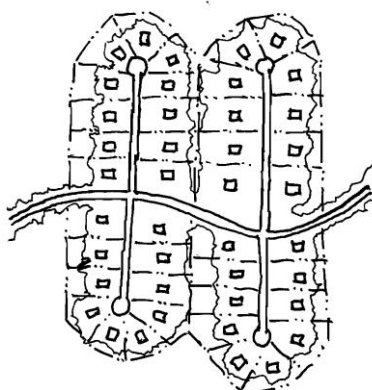
- ▶ **Zoning or Municipal Land Use.** Instead of Euclidean Zoning currently applied by many jurisdictions – particularly towns and cities – this Framework is a hybrid. It includes both common zoning criteria such as height and setbacks, etc., but it also is visually oriented, or form based. The intent is that it is more important to the authenticity of a town to have developments that are compatible with historic architecture and urban form, than what happens inside each building. For jurisdictions that want to convert to a form-based code, the full system of regulating plans and descriptions of architectural elements can be added. (The Congress for New Urbanism has a model code that will illustrate the composition of this approach). Below is an example of a regulating plan and the street typologies that are attached to each street. This would be the type of form-based plan that would control the development of a village.

Regulating Plan for Form-Based Ordinance Regulating Village Street Section

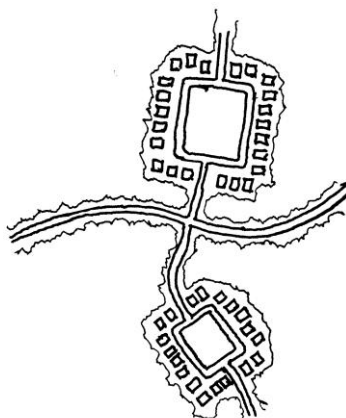


- ▶ **Land Use Planning.** As illustrated in this planning study.
- ▶ **Special Purpose Plans.** These are done for high value resources and landscapes such as Mayan antiquities and their surroundings.
- ▶ **Special Purpose Ordinances.** An example of these would be an overlay on all land use planning regimes for clustering. The conservation benefits and development cost benefits are clear as shown in the following diagram.

Conventional Subdivision



Clustered Subdivision



- ▶ **Conservation Plans.** This Framework has the added value of describing conservation typologies that allow low intensity development that can be used to conserve the surrounding resource. This may be done by distributions of proceeds or by using high quality development to ensure that the surrounding area is not degraded.
- ▶ **Design Guidelines.** This form-based approach provides illustrations and principles that can be the basis for design guidelines applied to the Tourism industry.
- ▶ **Design Standards.** In addition to quantitative criteria, additional standards for development and operation can be added to provide a guide for developers and standards for the industry.

Certainly, other planning regimes can be informed by this Framework, and the next action in development and conservation planning would be to analyze these and go through the legal and administrative processes for their integration and revision.

5.1.2 Conservation strategies

There are a range of strategies that may be applied that range from high cost acquisition of environmentally sensitive and vulnerable land, to lower cost, consistent application of effective conservation standards.

1. Create a conservation ethic in Belize – consensus among stakeholders that effective conservation is necessary to this industry and the long term health of the economy.
2. Identify and map the natural and cultural resources, and their surroundings that are attractions to visitors to Belize.
3. Create an over-arching conservation vision and policy to protect these resources.
4. Give conservation an economic base – a strategy for conservation and stewardship on private and public lands that can be funded by limited development.
5. Prevent urban sprawl and institute methods that will cluster development in higher intensity areas.

Actions

Alternatives for actions on this front include:

1. Create a central data base that identifies by criteria, description and mapping, in quantitative and qualitative terms the valuable natural and cultural resources. This needs to be readily available to all agencies and stakeholders. It also needs to be maintained for the long term.

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2. Commission a study of the long term effects of existing and anticipated development practices on the resources in question. This can address alternative scenarios for future development and clearly demonstrate to all stakeholders the effects of conservation efforts or the lack thereof.
3. Create consensus through advertising and public relations of the importance of natural and cultural resources to the future of Belize. Use genuine sustainability as an attraction for high value tourism.
4. Set near and long term targets for conservation of identified resources. In as much as it will take time and perseverance to conserve the resources in question, each planning period needs objective goals for conservation.
5. Maximize existing infrastructure where capacity can be used to accommodate new development. This rather than permit new infrastructure improvements.
6. Maximize the value of land in government ownership by using it for demonstration projects and early sources of income to fund conservation. These projects may be ecolodges, conservation of specific development areas
7. Prepare a land use framework that specifies appropriate types of development and matches them to suitable land areas.
8. Establish development control for each initiative or issue. Formulate and implement the appropriate environmental design and development controls that consider issues such as water quality of the marine environment, tree preservation, development on steep land, disturbed areas, clustering development in existing urban areas and water conservation.
9. Commission a study of valuable visual resources (viewed areas for tourism). This will include a visual preference survey, mapping of resources and scenic byway plans and regulations.
10. Establish Fast Track projects that will enhance project momentum. Create a priority list of 5 projects and take them to the investor market.

In the process of this study, we reviewed a number of studies the goal of which is conservation of resources. They are all well-intentioned, but in many cases they are inflammatory, not based on science, and do not affect a rational approach to conservation. Not only does conservation need to be a priority for tourism development, the approach to conservation needs to be unified, rely on proper science and a rational approach to building consensus, regulations and a long term commitment.

- ▶ Sustainability and energy efficiency regulations
- ▶ Regulate for each destination the use of materials (compulsory, compatible, non-compatible) and some basic aesthetics conditions

5.1.3 Land use strategies

From a tourism development perspective, there are good and bad ways to attract quality development and developers through land use planning. The good way is through:

- ▶ Clear development standards that are consistently applied
- ▶ Clear and transparent entitlement processes that provide predictability to the permitting and development process
- ▶ Unified administration of the above.
- ▶ Public participation guided by good leadership working under well-coordinated planning regimes.

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Bad ways to attract quality development – or to prevent quality developers from taking an interest in a project – are inconsistent standards applied by separate agencies to different development criteria. Another is to make entitlements subject to the political process.

The analysis of the environmental and land use planning issues and planning regimes presented elsewhere in this body of work, along with the long list of special purpose plans illustrate that there is no lack of interest in planning, but that there are disparate agencies and interests at work. The major entitlements may come from all of the following:

- ▶ Department of the Environment
- ▶ Lands and Survey Department
- ▶ Coastal Zone Management Authority
- ▶ Municipal government.

Current and recent developments in environmentally sensitive areas or the sprawling development patterns are not indicative of their success in creating unified standards or processes. Of particular notice is the often ad hoc cutting of mangroves – the subject of several recent controversies. However, storm water management, wetland modification and development on steep slopes are several other key environmental issues in question.

As a basis for a unified approach to land use planning and the entitlement process, a Land Use Framework is presented in an annex to this report. This Framework includes the development models described above, but adds significant detail to the allowable limits to development as well as the character and scale of development that is appropriate to Belize. This Framework can be adapted or enhanced to fit into regulatory regimes at every level of government. Several of the elements of the vision are central to the need for central and unified permissions for tourism development. These include:

- ▶ The creation of high quality development within the tourism sector
- ▶ The attraction value of the natural environment
- ▶ The attraction value of the cultural environment to high quality tourism.

Developers generally make long-term investments that may span a 30 year development period and long-term investment. To make these commitments, their fundamental need is for predictability within the environment that affects their development.

For example, to develop a resort hotel in a natural area, it is not enough that the developer and operator are granted permission to build their hotel, but also that for the entire period of design, construction and operation that the areas around them do not change. It affects sustainability in two ways – occupancy of the hotel and the health of the natural environment.

Therefore, with respect to land use planning, strategies need to include:

1. Establish clear and evenly applied standards for development that consider environmental, social, cultural and economic well-being of Belize.
2. Establish a coordinated land use planning process to gain entitlements for tourism development.
3. Create a long-term approach to land use planning that will conserve the quality of the fundamental resources as well as encourage high quality tourism in Belize.

With respect to where to go from here, there are a number of fronts that can be addressed by the Land Use Planning process.

1. Review existing land use planning regimes for consistency and transparency. The following table presents a taxonomy of planning regimes that are customarily addressed in an advanced and predictable development environment.

Table: Taxonomy of Planning Regimes

Type of plan	Issues addressed	Responsible Agency
Country wide land use policies	Spatial, economic and social welfare and growth	Central government
Regional land use plan	Spatial distribution of development and conservation	Central government and regional authorities
Comprehensive plan	Integration of regional and municipal plans to appropriately allocate natural, economic and social resources. Often under the auspices of a Growth Management agency.	Central government
Municipal land use plan	Spatial distribution of acceptable types of development	Municipal government
Special Purpose Plans or Overlay plans	Plans that address areas or issues of particular concern or resources of particular value	Varies with importance of resource.
Municipal zoning or form based code	Permitted types of development and areas or forms in which they may occur.	Municipal planning authority
Land Development Regulations	Specifications of civil improvements	Planning, engineering and environmental agencies
Environmental codes	Standards for water and air quality, as well as sensitive ecosystems. These also affect water and wastewater networks as well as solid waste disposal and storm water management works.	Environmental, Engineering agencies
Building code	Building specifications and standards	Building department
Design guidelines	Discretionary standards for aesthetics, materials	Design review committee
Code enforcement	Inspections of construction and existing conditions	Code enforcement division

This taxonomy can be further delineated for the particular circumstances in Belize, but is presented in this way to suggest additional areas of consideration. It may be unrealistic to expect an overhaul of the entire system. However, at least the targeted tourism development areas and areas including and surrounding high quality antiquities should receive long-term and effectively integrated land use plans that conserve the fundamental resources and have the predictability to attract long-term investment.

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2. Create a centralized data base of mapped and demographic data that can be used to base land use plans on scientific data and models that can assess the degree of change that development will affect on the environment.
3. Creation of a “lead agency” approach to entitlements that provide a developer with one point of contact. For Tourism Development, this may be the DMO.
4. For tourism development, create clear development standards and design guidelines that address the issues of quality and context. These standards, and the processes used to administrate them should be form-based, so that the authenticity of development can be conserved.
5. Create a code enforcement mechanism to be sure that standards are maintained over the long term.
6. Create a clear process for developers to fund additional staff needed to review their application and operation.
7. Address specialized issues that affect sustainability and the quality of the tourism environment such as visual quality and clustering of development.
8. Create a limited, but expanding number of targeted development projects that are pre-approved with the kind of land use assurances characterized above. These permissions need to consider the sites and the surrounding areas. For example, it is of most benefit to an eco-lodge developer, (and consequently creates the most value to Belize), for the investor to know that the surrounding land area will be permanently conserved to keep their primary amenity pristine.

The greatest argument in favor of these actions is that this is a high value, low cost approach to attracting investment. Putting land use regimes in place and ongoing processes creates a significant amount of value, while it does not begin to cost as much as a new road, airport or other capital investments in infrastructure. Permissions, predictability and consistent enforcement are generally more valuable than the sale of the land they consider.

5.1.4 Planning priorities

Though it is really the choice of the stakeholders as to which planning strategies are of the highest priorities with respect to land use policy, strategy and implementation, there are some low cost, high value steps that may be taken to increase the quality of projects being funded and built. These include the following:

- ▶ Promote the development of pilot projects that implement the Land Use Framework
- ▶ For one or more high value pilot projects, gain control of the land, prepare site plans and provide land use authorizations for developers and investors.
- ▶ Improvement and connection of services to the new development areas considering the contribution that the private initiative could make to assume their implementation costs
- ▶ Create a centralized data base for mapped information, including property lines, topography, aerial photography, environmental data and any mapped data from existing studies. Also, create a common format for analysis of land for projects and planning.
- ▶ Convert the Land Use Framework into a unified ordinance for project planning.

6 ANNEX 3: SUSTAINABILITY BEST PRACTICES RECOMMENDATIONS

Below is a proposal for the corrective measures that should be taken into account and introduced during the drafting and execution phases of the projects connected to the proposals of this master plan, with the objective of minimizing impact during the operational phase.

Low-noise surfacing. In order to minimize acoustic impact the use of low-noise surfacing is proposed on new roads.

Illumination quality. To comply with standards to improve efficiency some of the usual conditions should be considered on the different developments:

- ▶ Type of lamps:

Evening hours	Night-time hours
Preferably VSBP/VSAP	Preferably VSBP/VSAP

VSBP: sodium lamps low pressure. VSAP: sodium lamps high pressure

- ▶ Maximum Flux percentage for upper hemisphere of a light globe:

Evening hours	Night-time hours
15	15

- ▶ Maximum glare level in outdoor street lighting: 15 %.
- ▶ Maximum glare index in lighting for pedestrians (I):

Height of light (meters)	I
4.5	4,000
4.5-6	5,500
6	7,000

- ▶ Maximum intrusive illumination in vertical surfaces, expressed in lux:

Evening hours	Night-time hours
10	5

- ▶ Average maximum illumination in areas intended for vehicle and/or pedestrian traffic, expressed in lux:

	Illumination in vehicle area	Illumination in pedestrian area
Heavy traffic	35	20
Moderate traffic	25	10
Light traffic	15	6

- ▶ Maximum luminance of signs: 800 cd.m-2.
- ▶ Maximum luminance of buildings, shop fronts and windows

Evening hours	Night-time hours
80	40

- ▶ Average maximum luminance of facades and monuments, expressed in cd.m-2:

Evening hours	Night-time hours
10	5

Public lighting. The following corrective measures are proposed in order to reduce and minimize the light pollution caused by the artificial lights used in the public lighting of the area:

- ▶ Use of the most appropriate type of lighting according to its use: street, highway, pedestrian area or ornamental.
- ▶ Use switching systems such as high quality photoelectric cells or astronomical clocks, to ensure that the lights do not remain on at times when there is natural light.
- ▶ Use sodium vapor lamps because they consume almost half the electricity of mercury vapor, and generally produce less light pollution.
- ▶ Ensure that the exteriors of the lamp fixtures are flat, that the material used has high transmission capacity and that it is weather resistant and durable.
- ▶ Do not use globe-type lamp fixtures without a reflector on top, since they emit a lot of light above the horizontal.
- ▶ As much as possible, avoid ornamental lighting, and if it is unavoidable, use high-performance asymmetrical lamp fixtures, since they provide better lighting with less light.
- ▶ Attempt to avoid the emission of light above the line of the horizontal, especially in highway and street lighting.

Conservation of existing vegetation. Existing vegetation should be conserved or transplanted nearby if punctually needs to be cleared

Native species. The tree and plant species that are planted shall be natives. It is not recommended to plant any species which could alter the ecological balance or importance of the native vegetation. The existing alien species should be analyzed and those which could alter the location's own natural habitats such as quality of the soil or water needs should be discarded and not used for future interventions.

Rain water should be used for watering the green areas. Watering needs will take advantage of rain water, collected from buildings or from street guttering and then channeled through a dedicated rainwater collection network.

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Installation of automatic watering controllers for green areas. Controllers will be installed to control the duration and frequency of watering for green areas, avoiding their use during the hours in the middle of the day, since evaporation is higher at this time.

Biodiversity of animal life. Species will be planted that offer food resources to animals and allow complex vegetation structures to be created, to promote the presence of wildlife. Enforcement policies need to be put in place to avoid sanding and cutting of mangroves.

Minimization of water usage. As a minimum, the following systems and mechanisms will be installed in the water usage systems for new buildings to minimize water consumption to set down environmental and eco-efficient criteria to be adopted in buildings:

- ▶ Taps for sanitary equipment for individual use (toilets, bidets and sinks, as well as shower units) will be designed to save water or will be equipped with water-saving mechanisms or similar devices, as well as flow-reduction mechanisms. In all cases, they will provide a maximum flow of 12 liters/minute and a minimum of 9 liters/minute at a minimum dynamic pressure in use of more than 1 bar.
- ▶ The toilet cisterns must be installed with systems for dual-flush or interruptible flush.
- ▶ In buildings used for educational, health or sports related purposes, it is compulsory to fit toilet and shower taps with either timed flush mechanisms or human presence sensors that will activate them.

Water re-use. The possibility and feasibility of introducing systems to reuse grey water in toilets will be considered.

Dual sewerage network. In compliance with regulations for the adoption of environmental and eco-efficiency criteria in buildings, buildings are required to be equipped with a sewerage system that separates rain water from waste water. This separation has to be maintained, at least as far as a control box located outside the property, or if this is not possible, at the point on the edge of the property closest to the general sewerage network. A single connection to the public network will be allowed if this network does not have a system for separating the two types of water.

Energy efficiency and saving. In new buildings, the following measures will be carried out as a minimum to promote energy saving and improve energy efficiency:

- a) The solid parts of different vertical exterior walls of buildings, whether protruding, exposed or protected, including thermal bridges built into these walls, such as frames for openings, exterior wall pillars, roller-blind boxes or others, will incorporate thermal insulation construction solutions that ensure an average thermal transmittance coefficient $K_m = 0.70 \text{ W/m}^2\text{K}$.
- b) The openings of exterior walls and roofs of habitable spaces will use double-glazing or other solutions that ensure average thermal transmittance coefficient for the entire opening equal to or less than $3.30 \text{ W/m}^2\text{K}$.

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- c) The openings of exterior walls and roofs facing south-east ($\pm 90^\circ$) must be equipped with a protective element or treatment located on the exterior or between the two layers of glazing, so that the solar factor S for the glazed area of the opening will be equal to or less than 35%
- d) Buildings which have a demand for heated potable water equal to or greater than 50 liters/day at a reference temperature of 60°C , need to be equipped with a hot water production system that uses solar thermal energy for its operation with a minimum contribution in %, depending on the areas or Districts within the country.

This requirement will not be enforced:

- ▶ When the energy needs for this heated potable water are provided by other renewable sources, cogeneration processes or residual energy sources originating in the installation of systems for recovery of heat independent to the building's own heat generation.
- ▶ When the building does not receive sufficient sunlight due to external barriers.
- ▶ In newly constructed buildings when there are unalterable limitations resulting from the applicable planning regulations, that make it obviously impossible to provide the capture area necessary.
- ▶ In all these cases it will be necessary to justify both the use of another source of energy different from those mentioned in point a), and the impossibility of execution as mentioned in the points above.
- e) In buildings where it is desired to use electrical resistors to produce heated potable water through the Joule effect, the minimum solar production in any area must be 70%.

This point will not be applied in areas where there is no piped gas service or where the electricity is obtained through photovoltaic solar energy or other renewable energy sources.

- f) In any building where the installation of dishwashing equipment is planned, there needs to be both a hot water and a cold water tank in the space planned.

Energy efficiency and energy saving in communal spaces. In common spaces (garage, entry hall, staircase, etc.) timers will be installed to turn off lighting systems.

Eco-efficiency parameters relative to construction materials and systems. In the construction of buildings, a minimum overall score of 10 point must be obtained through the use of some of the following construction solutions:

- a) Construction of a ventilated façade oriented to the south-west ($\pm 90^\circ$): 5.
- b) Construction of ventilated roofing: 5.
- c) Construction of roof garden: 5.
- d) Use of preindustrial systems on at least 80% of the surface of the structure: 6.
- e) Use of preindustrial systems on at least 80% of the surface of the exterior cladding: 5.
- f) Reduction of the average thermal transmittance coefficient K_m of the different vertical exterior cladding by 10% with respect to the parameter set in point 4.1: 4.

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- g) Reduction of the average thermal transmittance coefficient K_m of the different vertical exterior cladding by 20% with respect to the parameter set in point 4.1: 6.
- h) Reduction of the average thermal transmittance coefficient K_m of the different vertical exterior cladding by 30% with respect to the parameter set in point 4.1: 8.
- i) Provision of a system for reuse of rain water falling on the building: 5.
- j) Provision of a system for reuse of building grey water and rainwater: 8.
- k) Use of at least one product obtained from recycling of wastes (construction waste, tyres, waste foam, etc.) for sub-bases, floor covering, insulation panels and other uses: 4.
- l) In cases where there has been a prior demolition phase, reuse of the stone rubble generated in the construction of the new buildings: 4.
- m) The provision of natural cross ventilation for the different proprietary entities in the building: 6.
- n) Use of renewable energy forms to provide the climate control (heating and/or cooling) of the building 7.
- o) Lighting of communal or access spaces using human presence sensors, as long as the lighting system used will not be affected by the frequent switching on and off: 3.
- p) In residential buildings, when openings in the external cladding, either protruding or exposed, double window, or balcony solutions in which the total (frames and glass) has a minimum acoustic insulation for air-carried sound of 28 dBA: 4.

Suitable spaces for separation of waste. The different proprietary entities must have, either inside their units or in a community space, a system suitable for the uses involved which allows the separate storage of the different types of waste produced, without prejudice to the applicable provisions of industry regulations.

Suitable spaces in the street grid for the placement of containers. It is necessary to plan the allocation of sufficient space in the street grid for the placement of containers or other equipment needed to optimize operations for the collection and transport of solid wastes.

Below is a list of the corrective measures proposed for the construction **phase**.

Technical Inspection of Machinery. Construction machinery has to possess a current certificate of technical inspection, which among other things, checks atmospheric emissions.

Avoidance of generating dust during the construction phase. In specific cases when the construction activity and work generate a high quantity of dust, the work area will be watered to avoid adverse effects on people and animals.

Hours of construction work. The construction work will always be carried out during the day, between the hours of 8:00am and 8:00pm. Work at night has to be explicitly authorized by the city council.

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Motor vehicles. All motor vehicles must have all elements capable of producing noise in good working condition so that the noise of the vehicle with the engine running does not exceed the maximum values permitted in the regulations. Additionally, leaving the engine running when not necessary must be avoided.

Noise level measurement. A measurement of noise level will be performed if requested for any person affected by disturbances caused by any activity related to the works.

Identification and signaling of vegetation elements to be conserved. Trees that are considered unique or of special local interest and which are to be retained, will be identified in order to define and mark out a protection zone with a radius equal to the radius of the tree crown plus 5 meters, in order to avoid affecting the roots

Transplanting of vegetation elements to be conserved. If it is not possible to conserve these elements in their current location in the area under study, they will be transplanted to other appropriate locations in the area or the city.

Avoiding fire risks. During the construction work carried out in areas near the plants that are to be conserved, great precaution is needed in the use of flammable materials or machinery which while in use could constitute a fire hazard.

Delimitation of parking areas for machinery, storage of building materials and rubble. Parking areas for machinery must be minimized and strictly defined, and suitable spaces for storing building materials, as well for collecting rubble, must be defined. This must be carried out by the Environmental Management of the construction work based on the land use plans, and all spaces must be marked using reflective and visible plastic fencing, or any other system that clearly defines the space.

Containers for selective waste collection. In the construction area, containers for the selective collection of solid waste generated by workers on the construction project must be installed.

General clean-up of the area. When the construction works phase ends, a general clean-up of the un-built areas of the site and the area around the new buildings must be carried out to remove any remaining debris, surplus earth, municipal or solid waste that remains.

Management of construction waste. The management of waste generated during the works, as a result of the processes of demolishing existing buildings and construction of new buildings, must be conducted through authorized centers, regulating demolition and other construction waste, as well as other industry provisions relating to solid wastes and local bylaws that complement them or stipulate their deployment.

Waste management plan. Project master plans must incorporate a plan for management of construction waste in accordance to demolition and other construction waste best practices. The waste generated must be quantified by types and by phases of the construction and demolition,

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defining the operations of separation or selective collection which are expected to be performed at the site, specifying the method of reuse in situ and/or identifying the authorized waste management entity that will be used, preferably through a process of evaluating such entities.









Separation at source. To properly manage waste processes, separation of the different types of waste should be carried out at the source. To this end, the following containers must be installed:

- ▶ For stone waste, which will be recycled or placed in the rubble deposit
- ▶ For wood, metal, glass and packaging, which will be treated by waste recovery companies.
- ▶ For waste generated by trade processes(packaging, paint, electrical materials ...), which will be handled as in the case above. These containers may not be required, if the trades people involved in carrying out the works perform their own waste management. In any case, the way of handling this waste must be properly justified.
- ▶ These containers or receptacles shall be stored inside the construction area.





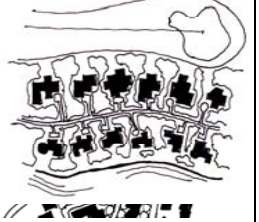





Initial separation of the items before demolition. In as far as possible, prior to demolition, the different elements of non-stone materials which are recoverable should be separated (to be sent to a sorting and recovery plant) and after demolition, the stone elements should be separated to be sent to a rubble recycling center and deposit.










Proper management of excess earth. If as a result of earth movements, surplus earth is generated, this must be properly managed, that is, it must be transported to appropriate management centers.

7 ANNEX 3: LAND USE FRAMEWORK

	A	B	C	D	E	F	G	H	I	J	L	M	N	O	P
1	LAND USE DISTRICTS														
2															
3	Proposed Classification		Code		Land Use Concept		Development Plan Example		Image		Site and Design Issues (location, adjacency, physical features)		Land Use Restrictions		Estimated Minimum Land Area
4															
5	Existing Town/Village		ETR		An existing Town or Village, that is reorganized or enhanced to function as a living and a resort community. Each Town or Village will require a strategy for redevelopment that addresses its physical features, historic character, value for development and tourism potential.						Towns and villages will require; adequate land to mix new resort facilities with existing development, enhancing urban open spaces, maintaining architectural scale and character, and creating development opportunities to fund redevelopment.		A general designation to be used for large scale land use planning prior to specific land use planning according to categories below.		25 Hectares
6															
7	New Village Resort		NVR		New Village Resorts are built to function as a destination resort, but look like a traditional town or village in Belize						Resort Towns or Villages are designed to provide all resort visitors and residences with a central gathering place for entertainment and daily functions. They should be on land with some of the best views or near a major amenity, such as the mountains, the ocean or a river.		Must be a mix of uses including hotels, conference facilities, housing, retail, restaurants and recreational facilities. They may be anchored by the central golf clubhouse or main hotel.		25 Hectares
8															
9	Resort		RT		Resorts include full service resort hotels, but not mixed use as a New Village Resort. It will have the amenities and services that will service frequent individual travelers, such as spas or conference areas. They may also service resort residential homes.						Ocean, mountain, nature, view or amenity oriented. Resort Hotels may have different configurations, either independent of other land uses, or anchored by a major amenity such as golf. They should be environmentally sensitive to existing forest, slope and other physical conditions. They may be joined with free-standing suites and		Hospitality driven without the mix of uses or public uses of New Town/Village Resorts		10 Hectares
10															
11	Conservation		CON		Conservation land uses have as a focus the conservation or preservation of natural or cultural resources such as cayes, jungle, rivers, wildlife habitat, reefs and coastal areas.		No or limited development				The fundamental natural and cultural resources that make Belize a unique destination must have a strategy for conservation that may be linked to limited development, or to a mitigation strategy to rectify past disturbances.		Very limited or no development. Development must not compromise environmental quality at all, and must be part of a strategy for conservation.		NA
12															
13	Special Purpose Area		SP		Areas that require a special planning process to conserve or preserve high value resources or to protect high value development		No or limited development				Large areas designated for integrated plan for conservation and development.		According to Special Purpose Area Plan		According to Special Purpose Area Plan

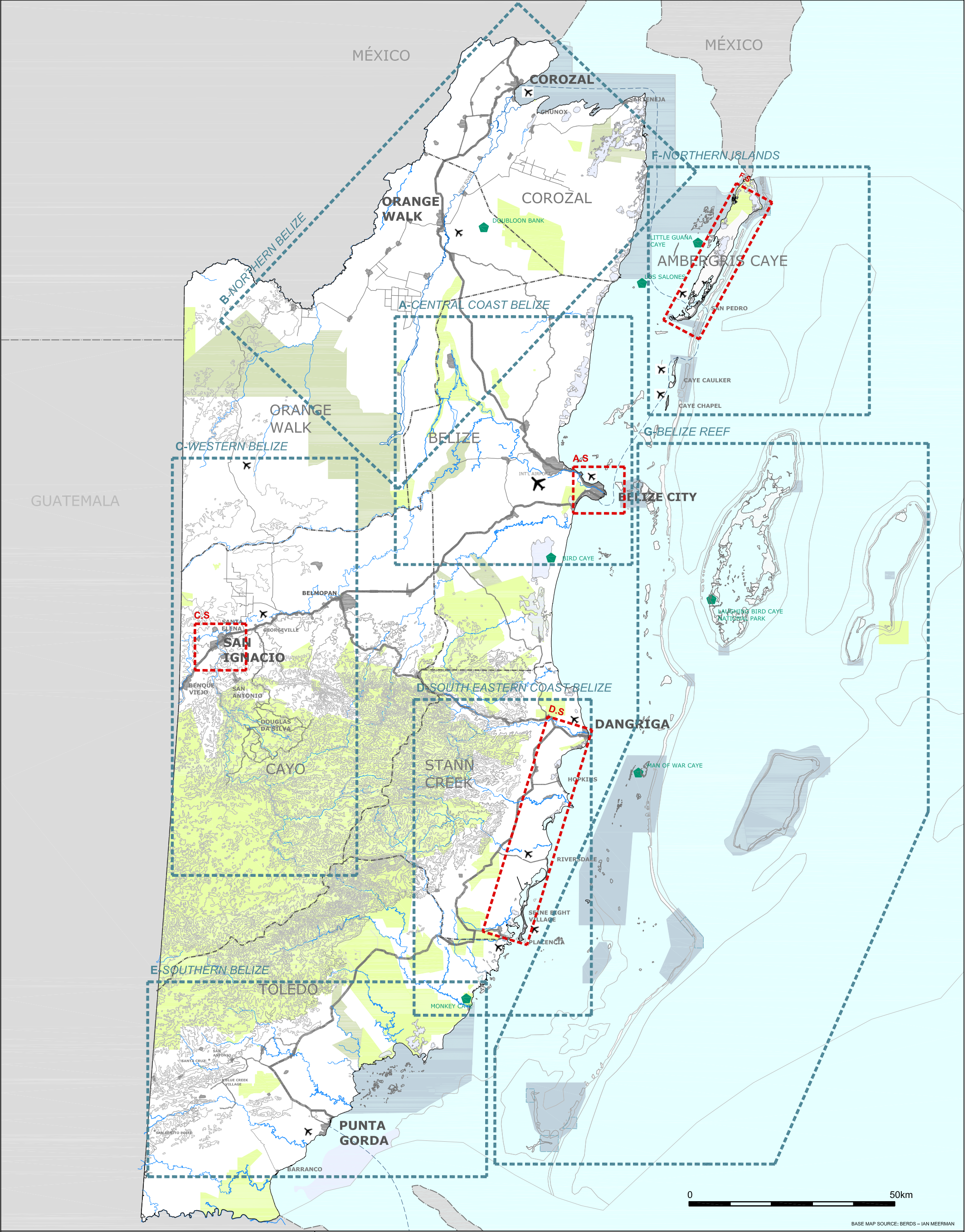
1	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH
2	I. EXISTING TOWN/VILLAGE																																	
3	Proposed Classification	Code	Land Use Concept	Development or Site Plan (if appropriate)	Image	Site and Design Issues (Location, adjacency, physical features)	Land Use Restrictions	Permitted Uses	Prohibited Uses	Typical Minimum Property Size	Typical Maximum Building Height (Stories)	Typical Maximum Building Area, Coverage or FAR	Typical Build-to-Line (Maximum Front Setback in Meters)	Typical Minimum Setbacks Front (F) - Side (S) - Rear (R) (Meters)	Typical Open Space Requirements	Typical Minimum Frontage (Meters)	Typical Density/Hectare																	
4																																		
5	Existing Town/Village	ETV	A general designation for towns, portions of cities and villages that are identified as having significant character and views, and are selected for regeneration and development for tourism.			Existing urbanized areas with special architectural or historic character. They will be on sites with good views of high value landscapes such as water or open land in agriculture or forest. It will often have proximity to tourism amenities such as marine attractions or Mayan antiquities.	The value of these towns and villages is diminished by substandard development and economically challenged neighborhoods. On the other hand, it is enhanced by a mix of authentic architecture and vibrant commercial areas in use by residents and visitors.																											
6																																		
7	Town/Village Center	TVC	Medium density, clustered, mixed use development that serves as the central commercial area of a town or village. The Village Center will contain a central gathering place, as well as an entertainment oriented retail district. Larger towns, such as Belize City, may have more than one Village Core.			The site for the Village Core should include any existing retail areas and be centrally located. Design should focus on a Plaza and it should be of a size adequate to accommodate civic functions such as open air markets or special events. Irregularity with building edges and extensions into smaller gathering places adds interest.	The Village Core will include the central Plaza, and this plaza should be surrounded by retail and civic uses, or a Village Hotel.	Mixed use retail, civic and residential, craft and artisan facilities	Infill residential and all others	1 Hectare	3 but 4 for signature buildings	0,75	0	0 S, 4 R	1 Plaza per 2 Hectares	5																		
8																																		
9	High Street Commercial	HSC	Street organized by retail and restaurants that acts as an entertainment destination for residents and tourists.			High Streets are usually lined with sidewalks with stores and restaurants opening directly onto the sidewalks. Parking on the street or nearby is essential. Architecture in historic vernacular is also important in Belize.	Architecture must be compatible with existing structures or historic vernacular. It is less important what happens within a building than what the building looks like and its relationship to the street.	Stores, restaurants, outdoor dining, offices and residential.	Industrial and low density residential.	100 meters in length	2 to 3 stories	0,8	0	0 - 0.5	None	10 meters	NA																	
10																																		
11	Leisure Destination	LD	Single attraction for tourists and residents such as a theme park.	No typical plan		These attractions need very good access and adequate parking. They include entertainment venues such as movie theaters, on street concessions, arcades and other amusements.	High parking requirements and buffering from neighboring residential or other uses that are incompatible with heavy weekend and evening use.	Retail, restaurants, amusements.	All other uses	1 Hectare	2 to 4 stories	1	0	NA	None	NA	NA																	
12																																		
13	Market	MKT	Permanent site with both permanent and temporary booths selling fresh food, crafts and other items that attract visitors and tourists.			Markets need access from public transportation and vehicular traffic with parking nearby. Areas for stalls can have outdoor electric stands as well as anchors for shade and weather structures.	Permanent buildings are not encouraged, except as outdoor stalls.	Shops, dining, outdoor retail stalls.	All others	25 Hectares	1 Story	NA	NA	NA	NA	NA	NA																	
14																																		
15	Urban Waterfront Promenade	UWP	Mixed use area with higher intensity commercial, residential and institutional uses oriented towards the water and a marina.			Near or within towns and cities with high demand for residential and associated retail and restaurants. Often focused on a recreational marina and high quality outdoor walkways and terraces.	Requires very good access from roadways as well as high parking requirements.	Marina, shops, restaurants, residential and offices.	All others	2 Hectares	6 Stories	1	0	According to plan	0,15	50 Meters	40 - 75																	
16																																		
17	Beach Front Destination	BR	Beach oriented retail, hotels, restaurants and bars in a linear organization along a beach that functions as circulation and for bathing and boating uses.			Typically in urbanized area with significant pedestrian traffic on streets and the beaches. Access is best at the end of streets and there must be adequate parking nearby. Open dining on the beach will be a major attraction.	Cannot create any visual or physical pollution in the water and may require special, break-away construction for hurricanes.	Shops, restaurants, outdoor concessions, hotels, residential.	All others	300 meters of water frontage	2 to 3 stories	1	0	0 - 0.5	0	10 Meters	NA																	
18																																		
19	Infill Residential	IR	Residential built between existing homes at a similar scale and separation. Infill residential will be homes located on streets between existing homes to reinforce the compact, street-oriented development pattern and to capitalize on existing access to buildable land. It will provide new homes for residents or vacation use.			Sites should be along streets between existing residential units. Design should be compatible in massing and height with existing structures.	Land use should be residential	Compatible residential uses	Retail	Compatible with neighboring residential	Compatible with neighboring residential	Compatible with existing village.	Same as neighboring property	2 - 6 F, 0 or 4 S, 4 R	None	10	10																	
20																																		
21	Neighborhood	NH	Multiple unit, medium density single family or multi-family development built within the urbanized area of an existing village. It may be associated with, and serviced by a hotel or guest house.			Unified development area dedicated to residential development. Homes will be designed to fit on a discrete site with common architectural vernacular. Homes should be oriented towards a view or amenity.	Single land use not mixed with retail, but may be adjacent to, or mixed with Village Hotel.	Single and multi family residential	All others	1 Hectare	2	0,5	NA	4 - 6 F, 0 or 4 S, 6 R	30%	10	20																	
22																																		
23	Waterfront Residential	WR	Single and multifamily residential on the water.			On high quality waterfront, but creating no visual or physical environmental impacts. Decks are not appropriate on beach side, but are permitting on inland waterways.	Residential and services	Single and multifamily residential - club facilities	All others	1 Hectare	2 or 3 Stories	0,5	NA	Minimum 75 meters from mean high tide	30%	50 Meters	5 to 35																	
24																																		
25	Town/Village Hotel	HT	Town or Village scale hospitality facility or guest house built within or contiguous with a village, at a compatible scale. May include spa, restaurants and be attached to, or provide service to Village Residential. Purpose is to encourage the development of hospitality services within the fabric of the Village Resort. In addition to rooms, Village Hotels may service adjacent Village Residential.			Located within a Town/Village Resort, with good views of natural areas, water or open space. Size of the hotel will be determined by the village development strategy and in any case be compatible with the size and scale of the original village and neighboring properties.	Hospitality, spa, restaurants, serviced residential, limited retail and conference	All others	1 Hectare	Compatible with neighboring residential	0,5	NA	3 F, 1 S, 6 R	30%	20	30																		
26																																		
27	Civic	CTV	Administrative, education, health care, public entertainment venues, religious and any other facility providing public services. Will be at a compatible scale and mass with the existing Town or Village, but may service more than one Village. Village Civic facilities include government, religious, educational and medical services.			They should be sited to provide a feature for a plaza, and architecture should be compatible with the historic character of the village. Civic facilities are often "signature" buildings that exhibit the importance of the village or a particular function	Civic facilities should be within, or adjacent to a Village Core. Adjacency to a Plaza is preferred.	Administrative, museums, religious, entertainment venue, health care, school, etc.	All others	.5 Hectare	Compatible with neighboring buildings	0,75	NA	5 F, 5S, 10 R	None	25																		
28																																		
29	Plazas/Parks	P	Small, urban park surrounded by buildings and providing the Town, Village or Neighborhood with a central gathering places.			Included within Village Cores	Paved open space	No development	.5 Hectares	NA	NA	NA	NA	NA	NA	20																		
30																																		
31	Town/Village Buffer	BF	An open space used to separate incompatible land uses, or to preserve views from a Town or Village to high value landscapes. Perpetual open space that defines the edges of a village and thumny penetrate the developed area.	No development		All villages need to have strong edges between settled areas and open space, particularly from primary views from main roads. Buffers must be dedicated around all or parts of all villages.	Buffers should be connected to surrounding areas of forest, rural or agricultural reserves.	Natural	No development	2 Hectares	NA	NA	NA	NA	NA	NA	NA																	
32																																		
33	Priority Redevelopment Areas	PR	Strategic areas for local development, a key that serves as a trigger for further action policy, mixed use and with a element of special interest for local people and tourists.								NA	NA	NA	NA	NA	NA	NA																	
34																																		
35	Resort	R	Tranining Resort, cluster of hotel services, rooms, suites and limited serviced residential with restaurants and spa			Resort Villages are on land generally less than 20% in slope. They are located to provide all resort visitors and residents with a central gathering place for entertainment and daily functions. They should be on land with some of the best views or amenity frontage such as the coast.	Must be a mix of uses including hotels, conference facilities, housing, retail, restaurants and recreational facilities. They may be anchored by the central golf clubhouse or main hotel.	Civic, commercial and residential	Industrial	25 Hectares	3 Stories and 4 for signature buildings	0,25																						
36																																		

1	III. RESORT																	
2																		
3	Proposed Classification	Code	Land Use Concept	Development or Site Plan (if appropriate)	Image	Site and Design Issues (location, adjacency, physical features)	Land Use Restrictions	Permitted Uses	Prohibited Uses	Typical Minimum Property Size	Typical Maximum Building Height (Stories)	Typical Maximum Building Area, Coverage or FAR	Typical Build-to Line (Maximum Front Setback in Meters)	Typical Minimum Setbacks Front (F) - Side (S) - Rear (R) (Meters)	Typical Open Space Requirements	Typical Minimum Frontage (Meters)	Typical Density	
4																		
5	Resort	NVR	Tourism directed hospitality, serviced residential, resort residential and recreational amenities (such as golf). Generally not large or complex enough to be a New Town/Village Resort.			Resort Villages are on land generally less than 20% in slope. They are located to provide all resort visitors and residences with a central gathering place for entertainment and daily functions. They should be on land with some of the best views or amenity frontage such as the coast.	Must be a mix of uses including hotels, conference facilities, housing, retail, restaurants and recreational facilities. They may be anchored by the central golf clubhouse or main hotel.	Civic, commercial and residential	Industrial	25 Hectares	3 Stories and 4 for signature buildings	0,25						
6	Resort Hotel	RH	Resort Hotels include full service resort hotels, but not mixed use as a New Village Resort. It will have the amenities and services that will service frequent individual travelers, such as spas or conference areas.			View or nature or amenity oriented. Hotels may have different configurations, either independent of other land uses, or anchored by a major amenity such as golf.	Hospitality driven without the mix of uses or urban design of New Village Resorts	Hospitality, spa, restaurants, serviced residential, limited retail and conference	All others	3 Hectares	2	0,5	5	3 F, 0 S, 3 R	30%	50	50	
7	Resort Residential	RR	Residential development developed for the tourism market with unified architectural design and in multifamily configuration.			Generally amenity oriented or adjacent to hotel or club. May be multi story flats or attached townhouses or duplex. Unified design with appropriate amenities such as common pools.		Single and multi-family residential	All others	2 Hectares	3 Stories and 4 for signature buildings	0,5		3 F, 0 - 4 S, 6 R	30%		25	
8	Resort Reserve Residential	RRR	Single family residential sited to preserve natural features such as trees and grade			In area with high quality land cover or high scenic resources - 100 meter setback from crest of hill. Design must conserve all natural features and blend with the landscape.		Open space and very low density single family residential	All others	2 Hectares per unit	2	0,05		25 F, 25 S, 25 R	60%	100		
9	Resort Recreation	RREC	This land use encompasses special resort amenities such as golf and equestrian facilities.			Golf must be on land generally less than 20% slope, but may occupy the level ground between steeper land.		Golf, tennis, pools	All but recreation related buildings	Golf courses a minimum of 70 Hectares.	1	NA		NA	NA	NA		
10	Resort Buffer	RBF	An open space used to separate incompatible land uses, or to preserve views from a Town or Village to high value landscapes. Perpetual open space that defines the edges of a village and that may penetrate the developed area.	No development		All villages need to have strong edges between settled areas and open space, particularly from primary views from main roads. Buffers must be dedicated around all or parts of all villages.	Buffers should be connected to surrounding areas of forest, rural or agricultural reserves.	Natural	No development	2 Hectares	NA	NA	NA	NA	NA	NA		

	A	B	C	D	E	F	G	H	J	K	L	M	N
1	V. SPECIAL PURPOSE AREAS												
2													
3	Proposed Classification		Code		Land Use Concept		Plan or Image		Site and Design Issues (location, adjacency, physical features)		Land Use Restrictions		Permitted Uses
4													
5	Special Purpose Areas		SPA		High value natural and cultural resource areas that require a Special Purpose Plan that is based on protection of the resource and visual resource analysis. Generally no development or limited, low density development				Areas within and surrounding tourism resources of very high value that have significant opportunity for visitation and development, but that are also highly sensitive environmentally or vulnerable to over use by visitation or improper development.		Must first focus on conservation of the underlying resource and then on compatible development.		Depends on Special Purpose Plan
6	Antiquities		ANT		High value antiquity from Mayan, religious or other history. Special Purpose Area Plan should first consider conservation and protection of the resource, and then the quality and type of surrounding development, if any. Antiquities will provide protection for archaeological and historical resources. Each Antiquity area will require a Special Purpose Area Plan that considers internal and surrounding land use.				Land uses around Antiquities should be designed to use the resource as an amenity or focus for development, all according to the Special Purpose Plan.		Limited to antiquity, secure area surrounding it, visitors center. Related low-impact development according to Special Purpose Area Plan		Low-impact visitors centers or hospitality development
7	Archaeological Study Area		ASA		Area with Antiquities or Cultural Resources, or believed to have Antiquities or Cultural Resources, where excavation and study is underway or planned to be underway. May be a temporary land use.		NEED PHOTOGRAPH OF DIG		These areas should receive the same kind of protection from encroaching land uses and security. Being work sites, they do not need organization for visitation.		Only uses related to the recovery and investigation of archaeological resources.		Excavation and archaeological activities. Limited, low-impact and temporary lodging for technical people.
8	Heritage Cultural Destination		HCD		Current cultural resource, such as a church, recreation area or outdoor market and that is not an Antiquity. These areas may be of limited land area in an urban area, such as the stadium in San Ignacio, or very large land areas such as a watershed or wildlife habitat.				These areas should have protection from encroaching or conflicting land uses and be well organized for visitation. They should be designed with adequate parking and other needed services.		Only the primary cultural uses barring encroachments. May also have parking or maintenance areas.		Existing land use
9	Marine Landing Area		MLA		Waterfront conservation area that may also have tourism oriented installations such as picnic areas, a dock or other leisure activity.				Needs to first consider conservation of the marine and adjacent upland environment and to ensure that permitted usage does not compromise its quality or its value for visitation.		No vertical development.		Only very limited development for recreation purposes and no permanent lodging or residential uses.
10	Water Resource Area		WRA		Catchment area or watershed where water collects to form a stream or well field.				High value water management areas where water quality and quantity are sensitive to any development, but where visitation can bolster tourism visitation.		Development cannot compromise water quality or quantity		Only development that will create no sedimentation or erosion nor any pollutants to enter the water management area. Also, may be altered to control flooding if the above restrictions are considered.
11	Ecologically Sensitive Area		ESA		High value habitat for a mix of flora and fauna that represents a mature ecosystem and a valuable asset for tourism.				These areas are likely to be on steep or high ground or be marine related. They should have protection from all encroachment, and may have organized plans and facilities for visitation. They will require a management plan and ongoing maintenance.	0	Conservation only, trails or other nature based recreation, or very low density nature based development.		According to Special Purpose Area Plan
12	Sensitive or Vulnerable Landscapes		SVL		Areas such as waterfronts or mountain tops that are highly visible or represent resources essential to the conservation of the area. Development, if any, should relate to the conservation, visitation or environmentally safe enjoyment.				Areas with high scenic value for a high percentage of visitors.		Very limited development.		According to Special Purpose Area Plan
13	Scenic Byways		SCB		Roads that pass through areas of high landscape value, scenic landscapes or archaeological sites, or that have importance in the connection of historic cities or areas.				Roads that travel along ridges or through valleys that have sustained distances with only natural or agricultural scenery.		Very limited or no development. Visitor areas and picnic grounds.		According to Special Purpose Area Plan
14	Special Places		SP		Places designated as important to the visitors and residents of the Area.				These places can be of the highest historical and cultural value, and as such, they should be organized for visitation and security. Adjacent land uses should be very low impact. Buffers to conserve viewsheds may be very important to conservation of their value.		Conservation of neighboring property is essential. Any related use such as lodging or visitors centers should be limited in scope with no encroachment on enjoyment of the resource area.		According to Special Purpose Area Plan

8 PHYSICAL PLAN · Country layout

PHYSICAL PLANNING – NATIONAL SUSTAINABLE TOURISM MASTER PLAN · BELIZE



BASE MAP SOURCE: BERDS – JAN MEERMAN

NATIONAL SUSTAINABLE TOURISM MASTER PLAN OF BELIZE

MAY 2011

TOURISM&LEISURE
EUROPRAXISCONSULTING

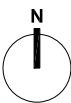


PHASE:

DEVELOPMENT PLANS
AND RECOMMENDATIONS

PLAN N°:

1



LEGEND

- MAJOR ROADS
- SECONDARY ROADS
- MINOR ROADS
- MAJOR TRACKS
- FERRY ROUTE
- RIVER
- DISTRICT BOUNDARY
- INTERNATIONAL BOUNDARY

PROT. AREAS

- TERRESTRIAL PROTECTED AREAS (FD)
- PRIVATE PROTECTED AREAS
- MARINE PROTECTED AREAS
- PROTECT BIRD SANCTUARY
- EXISTING SETTLEMENT

DESTINATIONS*

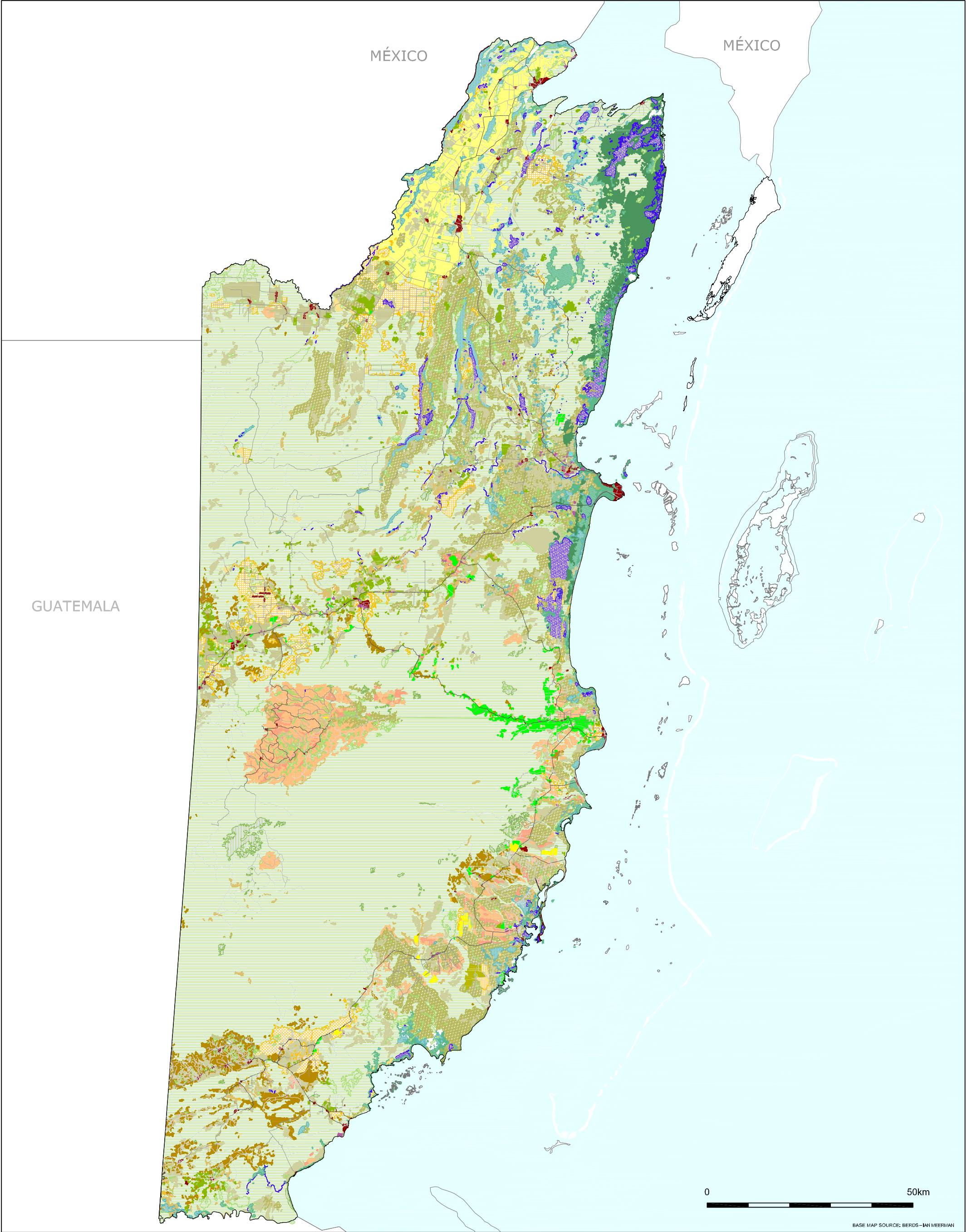


DESTINATIONS



SPECIFIC DEVELOPMENT AREAS

*NOTE: Definition of boundaries is approximate and only indicative for the different strategic areas



BASE MAP SOURCE: BERDS-IAN MEERMAN

NATIONAL SUSTAINABLE TOURISM MASTER PLAN OF BELIZE

MAY 2011

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PHASE:

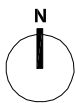
**DEVELOPMENT PLANS
AND RECOMMENDATIONS**

PLAN:

COUNTRY LAYOUT
LAND USE

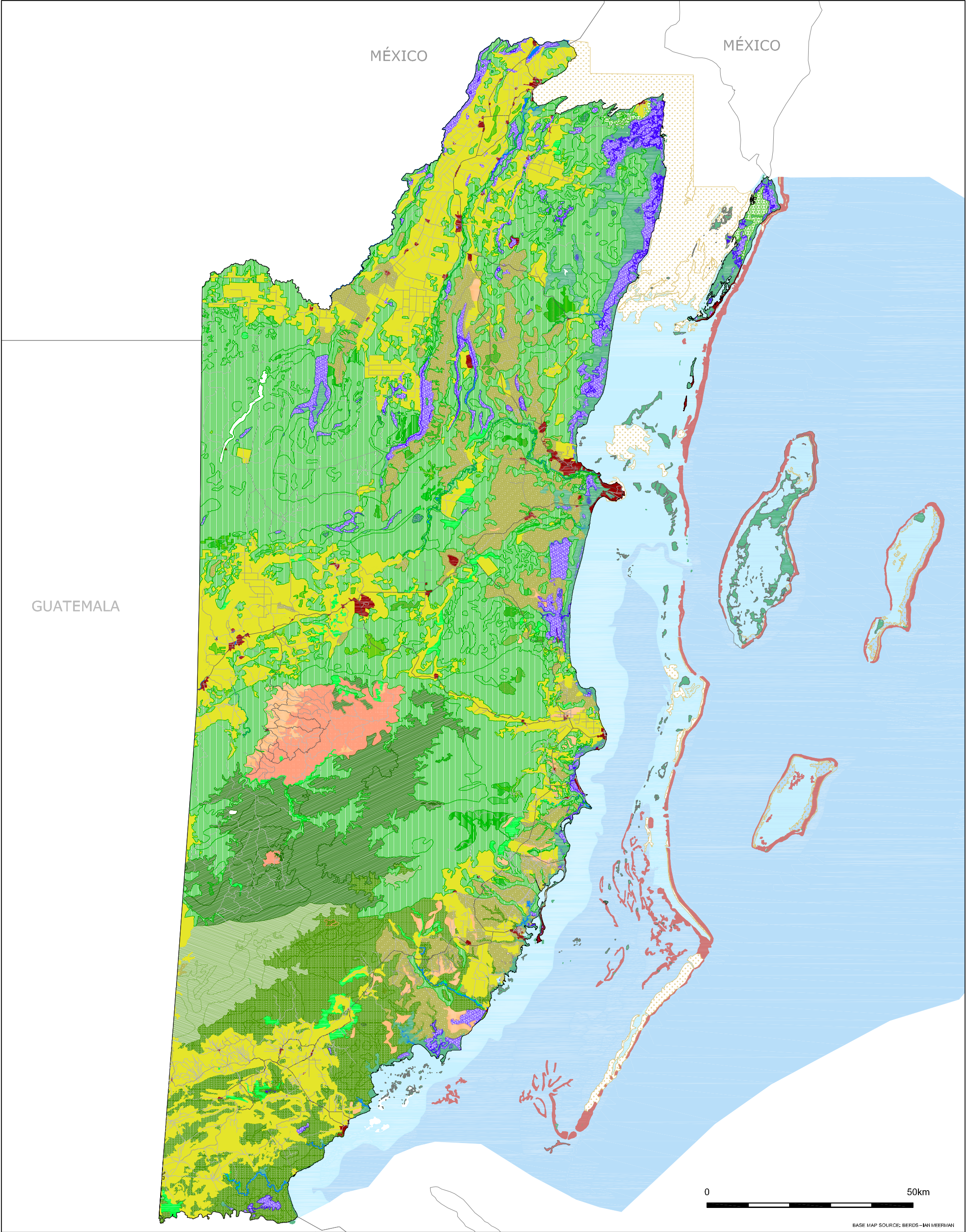
PLAN N°:

2



LEGEND

- | | | | |
|-------------------------------|------------------------------------|------------------------------------|--------------------------|
| ANNUAL CROPS | COCOA | BARE LAND | MANGROVE (DWARF) |
| ANNUAL CROPS - NON MECHANIZED | MANGO | PASTURE (IMPROVED & UN-IMPROVED) | MANGROVE (MEDIUM - TALL) |
| BAMBOO & RIPARIAN VEGETATION | SHIFTING CULTIVATION (MILPA) | BROADLEAF FOREST | MARSH SWAMP |
| BANANA | SHRIMP FARMING | BROADLEAF FOREST - OPEN (WOODLAND) | PINE FOREST |
| CASHEW | SUGAR-CANE | COASTAL STRAND VEGETATION | PINE FOREST - OPEN |
| CITRUS | SALINE SWAMP VEG W_PALMETTO | HERBACEOUS & SHRUB | BUILT-UP |
| CLEARING FOR AGRICULTURE | THICKET & OTHER DEGENERATED FOREST | SAVANNAH | NON BUILT-UP (INDUSTRY) |
| | | | WATER BODIES |



BASE MAP SOURCE: BERDS-IAN MEERMAN

**NATIONAL SUSTAINABLE TOURISM
MASTER PLAN OF BELIZE**

MAY 2011

TOURISM&LEISURE
EUROPRAXISCONSULTING



PHASE:

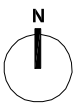
**DEVELOPMENT PLANS
AND RECOMMENDATIONS**

PLAN:

**COUNTRY LAYOUT
ECOSYSTEMS**

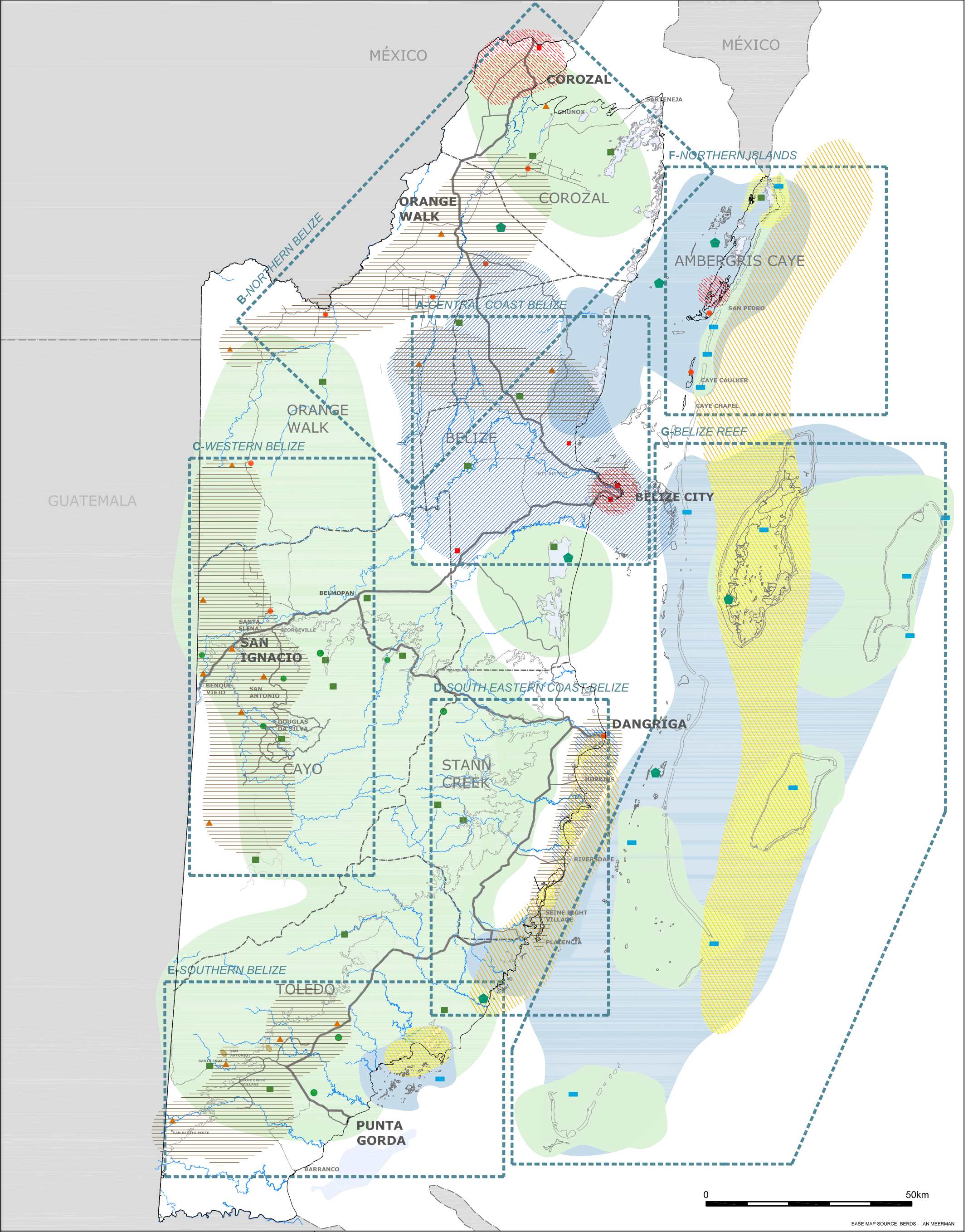
PLAN N°:

3



LEGEND

- | | | | |
|--------------------------------------|---------------------------------|--------------|-------------------|
| SUBMONTANE BROAD-LEAVED MOIST FOREST | LOWLAND BROAD-LEAVED WET FOREST | SPARSE ALGAE | CORAL REEF |
| SUBMONTANE BROAD-LEAVED WET FOREST | LOWLAND PINE FOREST | SEAGRASS | AGRICULTURAL USES |
| SUBMONTANE PINE FOREST | LOWLAND SAVANNA | WETLAND | URBAN |
| LOWLAND BROAD-LEAVED DRY FOREST | MANGROVE AND LITTORAL FOREST | WATER | |
| LOWLAND BROAD-LEAVED MOIST FOREST | SHRUBLAND | OPEN SEA | |



NATIONAL SUSTAINABLE TOURISM MASTER PLAN OF BELIZE

MAY 2011

EUROPRAXISCONSULTING

BELIZE TOURISM BOARD

PLAN:

COUNTRY LAYOUT
CLUSTER OF PRODUCTS

PHASE:

DEVELOPMENT PLANS AND RECOMMENDATIONS

PLAN N°:

4

N

TYPE OF ATTRACTORS

- HERITAGE
- LIVING CULTURE
- MAN-MADE
- MARINE RESERVES
- RESERVES/PARKS/SANCTUARY
- CAVES
- BIRD SANCTUARY

CLUSTER OF PRODUCTS**

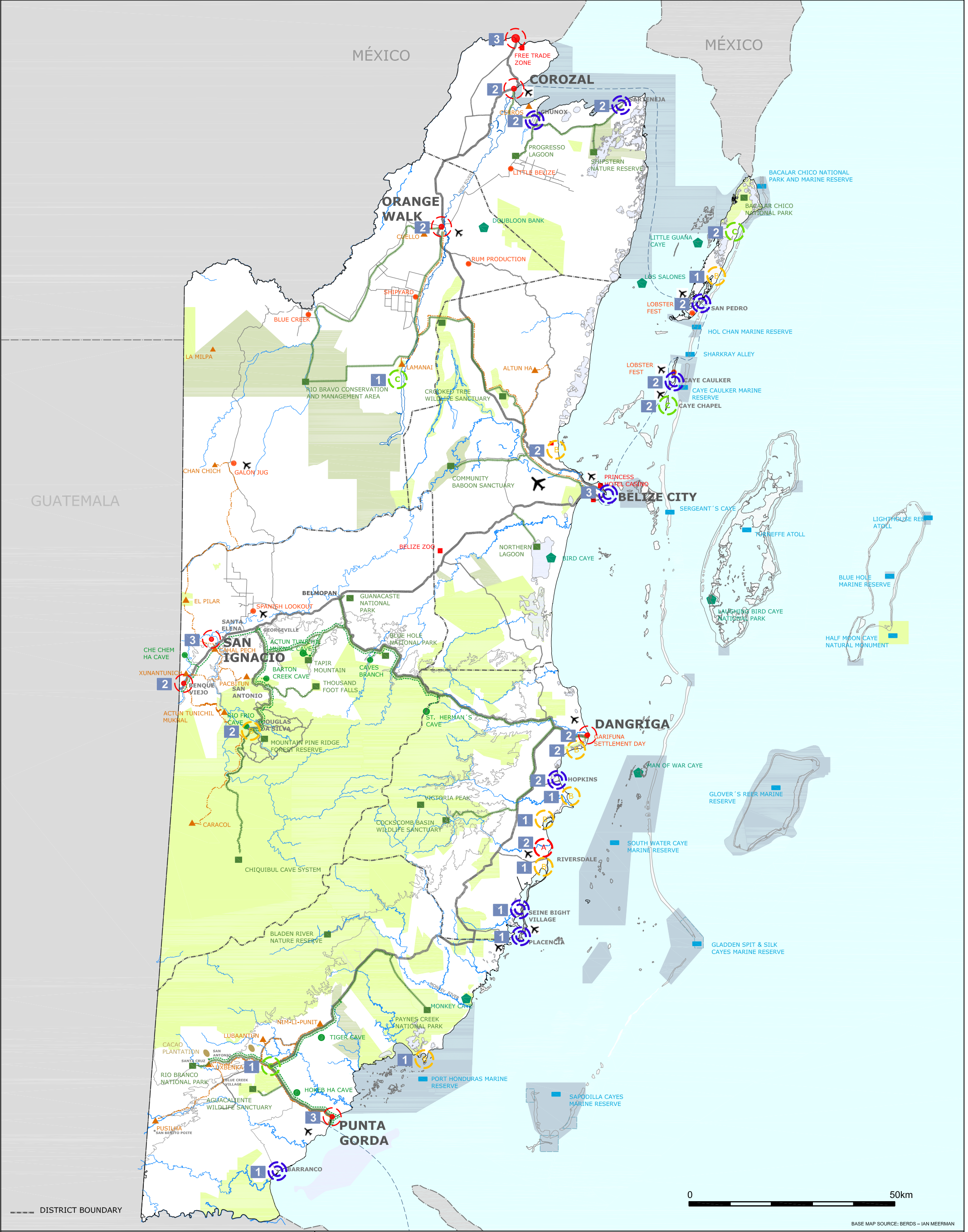
- NAUTICAL
- NATURE-BASED
- CULTURE
- SUN & BEACH
- PRISTINE BEACHES
- L&E
- CRUISE (MEDIUM INTENSITY)
- CRUISE (POCKET-LOW INTENSITY)

**NOTE: Perimeters are approximate and only indicative of the main areas of influence

DESTINATIONS*

DESTINATIONS

*NOTE: Definition of boundaries is approximate and only indicative for the different strategic areas



NATIONAL SUSTAINABLE TOURISM MASTER PLAN OF BELIZE

MAY 2011

PLAN:

COUNTRY LAYOUT
PROPOSED MODEL

PHASE:

DEVELOPMENT PLANS
AND RECOMMENDATIONS

PLAN N°:

5

N

I

TYPE OF ATTRACTORS

HERITAGE

LIVING CULTURE

MAN-MADE

MARINE RESERVE

RESERVES/PARKS/SANCTUARY

CAVES

TRAIL*

MAYA TRAIL

CAVES ROUTES

NATURE-BASED ROUTE

*NOTE: Routes to define on detailed cartography
New trails might be added or some subtracted.

TERRESTRIAL PROTECTED AREAS (FD)

PRIVATE PROTECTED AREAS

MARINE PROTECTED AREAS

PROTECT BIRD SANCTUARY

MODEL OF DEVELOPMENT

PROMOTED GROWTH

MODERATE GROWTH

INFILL AND COMPLETION OF EXISTING TOWN/VILLAGE

NEW RESORT/TOWN (LOW-MEDIUM DENSITY)

NEW RESORT/TOWN (LOW DENSITY)

MAINTAIN CHARACTER WITH RESORT HOTEL(VERY LOW DENSITY)

REFERENCE DENSITY

1

around 4 units/ acre - 10 units/hectare

2

up to 20 units/acre - 50 units/hectare

3

up to 40 units/acre - 100 units/hectare

BASE MAP SOURCE: BERDS – JAN MEERMAN

A- CENTRAL COAST BELIZE

OBJECTIVES

- Redevelop Belize City Waterfront including cruise landing / departure area and nautical facilities
- Completion and urban renovation of Belize City Historic District
- Improve essential Infrastructures and services to promote Belize City as an overnight destination
- Renovate, enhance access and Increase the tourism attractors and services to consolidate the existing and potential flows both in the city and outside the city

GROWTH

- Mid-volume tourism development with an average annual increase of 5.5% (2010 - 2020) and 6.1% (2020 - 2030).
- Expected generated overnights In 2030: 897.376

B- NORTHERN BELIZE

OBJECTIVES

- Promote the rich natural sites on the north, facilitating access and creating specific products such as visits to the Mennonites compounds
- Consolidate and Increase accommodation offer to set Corozal and Orange Walk as tourism bases
- Promote the growth and develop free trade facilities expanding the existing ones or planning new spaces, as a pole to attract tourism from Mexico

GROWTH

- Mid volume tourism development of an annual increase of 6.9% (2010 - 2020) and 5% from 2020 - 2030.
- Expected generated overnights In 2030: 651.310

C- WESTERN BELIZE

OBJECTIVES

- Increase overnight facilities will add to the economy of the region as well as balance the pressure on the coastal areas for lodging access to this region.
- Promote infill projects to help complete the empty brownfields within the urban fabric of San Ignacio
- Improve accessibility form International airport, Belize city and the rest of main tourism destinations around the country.
- As the destination, the assets and accommodation facilities are geographically very disperse, create a central tourist information area offering leisure and activities to promote the brand and offer information. This would naturally be San Ignacio.
- Promote the destination of San Ignacio to become the "Adventure Capital of Belize"

GROWTH

- Mid volume tourism development 4.3% (2010 - 2020) and 3.5% (2020 - 2030).
- Expected overnights generated in 2030: 989.084

D- SOUTH EASTERN COAST BELIZE

OBJECTIVES

- Do not develop cruise ship tourism on Placencia itself, but rather limit the cruise tourist arrivals to the minimal extent in deference to the idea of developing it outside the peninsula.
- Limit the development at Placencia Lagoon to protect Placencia Peninsula and its sensitive and vulnerable eco-system primarily the extensive mangrove habitat.
- Ban any new big development projects in the area of Placencia Peninsula and encourage coastline development further north from Riversdale in the Stann Creek district.
- Develop new sustainable tourism oriented town and resorts in a compact nuclei avoiding dispersion and minimizing impacts on natural environment
- Required tourism facilities and basic Infrastructure (such as wastewater treatment in Placencia) should be provided before attracting further tourists and start operating the airport
- Avoid negative social impacts on local population such as dislocating local people for tourism development losing the authenticity of the destination
- Institute clear standards and policies for conservation of the natural environment to guide the scale and impact of development

GROWTH

- Mid-Hight development of tourism volume of 13.5% (2010 - 2020) and 12.5% (2020 - 2030) annually (excluding Placencia Peninsula).
- Generated overnight expected in 2030: 1,262,520
- Mid development of tourism increase in Placencia Peninsula: of annually 8.6% (2010 - 2020) and 3.0% (2020 - 2030).
- Generated overnight expected in 2030: 489,710
- Total Generated overnight expected in 2030: 1,752,230

E- SOUTHERN BELIZE

OBJECTIVES

- Promote Nautical Tourism In Punta Gorda and the coastline.
- Slightly Increase tourism accommodation using empty land on Punta Gorda central city area
- Enhance the access to the natural areas to the west and north, planning a limited development based on the conservation of the underlying resource.
- In the towns, organize and Improve public spaces to improve urban functions, and to enhance tourism facilities
- Create new tourism attractions around the agro tourism and rural tourism using the cacao plantations

GROWTH

- In general, mid tourism volume development with a 10.4% (2010 - 2020) and 9.6% (2020 - 2030) annual increase.
- Generated expected overnights in 2030: 248,370

F- NORTHERN ISLAND

OBJECTIVES

- Development must be limited by Impacts to the natural environment.
- Ban accommodation facility's development in the southern and northern most ends of the island as these areas should be reserved for residential or preserved areas and only receive day-visits from tourism.
- Do not allow density development above 40 units per acre on the Northern Islands. Very low impact, but very high quality development in existing natural areas
- Protect from development the wetlands and mangrove areas.
- Protect from development Bacalar Chico Marine Reserve. The sole development which should be authorized should be the required facilities.

GROWTH

- Low annual tourism volume development of 4.6% (2010 - 2020) and 2.2% (2020 - 2030) in the Northern Islands.
- Generated expected overnights in 2030: 1,209,224

G- BELIZE REEF

OBJECTIVES

- Limit growth, only allowing it for necessary improvements to existing homes, resorts, lodges and other facilities
- Preservation of the Barrier Reef and all other marine habitats

GROWTH

- Low annual tourism volume development of 4.0% (2010 - 2020) and 5.0% (2020 - 2030).
- Expected overnights in 2030: 147,783

NATIONAL SUSTAINABLE TOURISM MASTER PLAN OF BELIZE

MAY 2011

TOURISM&LEISURE
EUROPRAXISCONSULTING



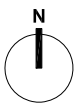
PHASE:

DEVELOPMENT PLANS
AND RECOMMENDATIONS

PLAN N°:

6

COUNTRY LAYOUT
SUMMARY PLAN



TYPE OF ATTRACTORS

- HERITAGE
- LIVING CULTURE
- MAN-MADE
- MARINE RESERVES
- RESERVES/PARKS/SANCTUARY
- CAVES
- BIRD SANCTUARY

TRAIL*

- MAYA TRAIL
- CAVES ROUTES
- NATURE-BASED ROUTE

*NOTE: Routes to define on detailed cartography

DESTINATIONS**

DESTINATIONS

**NOTE: Definition of boundaries is approximate and only indicative for the different strategic areas

CLUSTER OF PRODUCTS***

- NAUTICAL
- NATURE-BASED
- CULTURE
- SUN & BEACH
- PRISTINE BEACHES
- L&E
- CRUISE (MEDIUM INTENSITY)
- CRUISE (POCKET-LOW INTENSITY)

***NOTE: Perimeters are approximate and only indicative of the main areas of influence

MODEL OF DEVELOPMENT

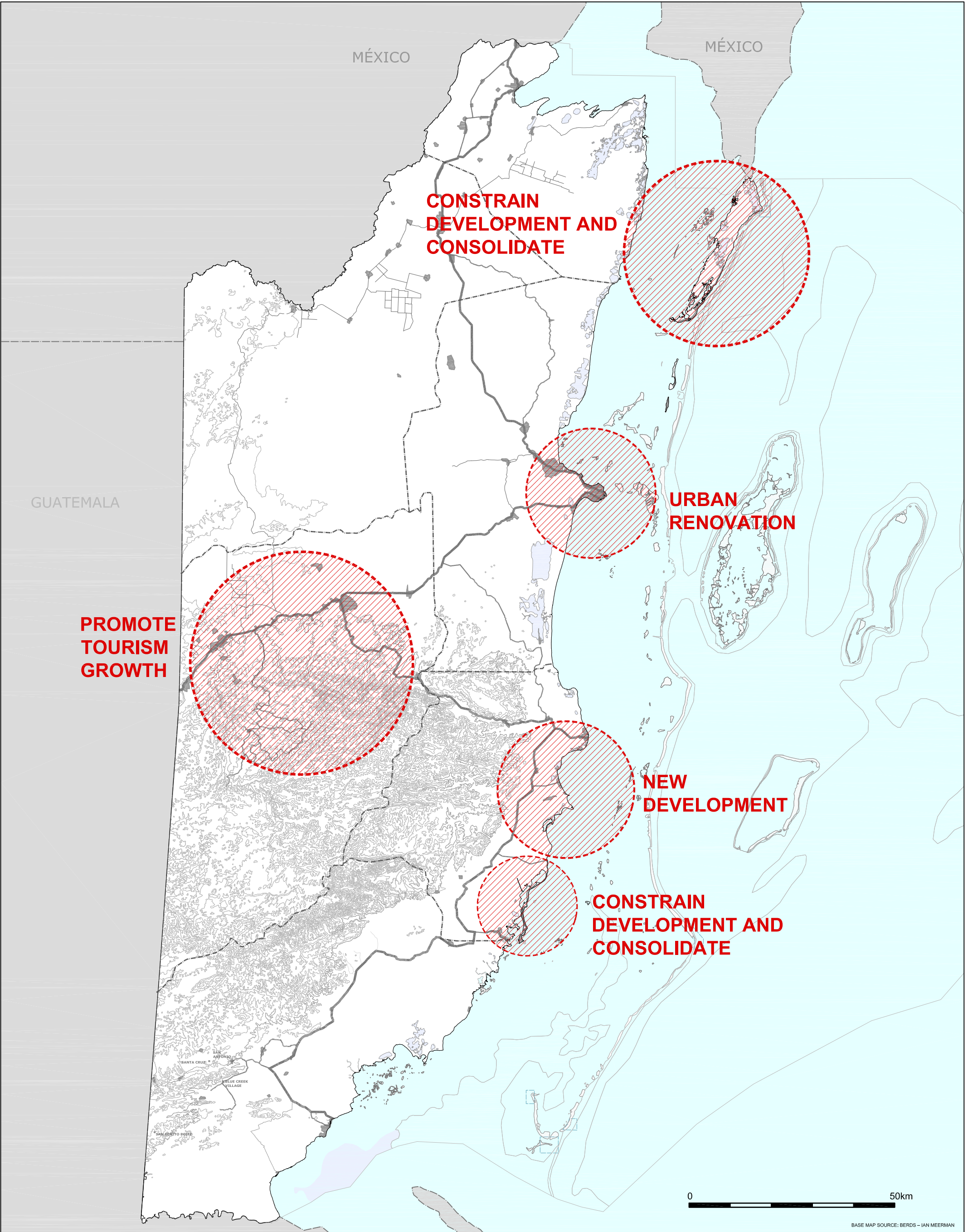
- PROMOTED GROWTH
- MODERATE GROWTH
- INFILL AND COMPLETION OF EXISTING TOWN/VILLAGE
- NEW RESORT/TOWN (LOW-MEDIUM DENSITY)
- NEW RESORT/TOWN (LOW DENSITY)
- MAINTAIN CHARACTER WITH RESORT HOTEL(VERY LOW DENSITY)




REFERENCE DENSITY

- 1 around 4 units/ acre
10 units/hectare
- 2 up to 20 units/acre
50 units/hectare
- 3 up to 40 units/acre
100 units/hectare

0 50km

BASE MAP SOURCE: BERDS - JAN MEERMAN




NATIONAL SUSTAINABLE TOURISM MASTER PLAN OF BELIZE MAY 2011		
 	PHASE: DEVELOPMENT PLANS AND RECOMMENDATIONS	
PLAN: COUNTRY LAYOUT CONCEPTUAL PLAN	PLAN N°: 7	

LEGEND

- MAJOR ROADS
- SECONDARY ROADS
- MINOR ROADS
- MAJOR TRACKS
- DISTRICT BOUNDARY
- INTERNATIONAL BOUNDARY

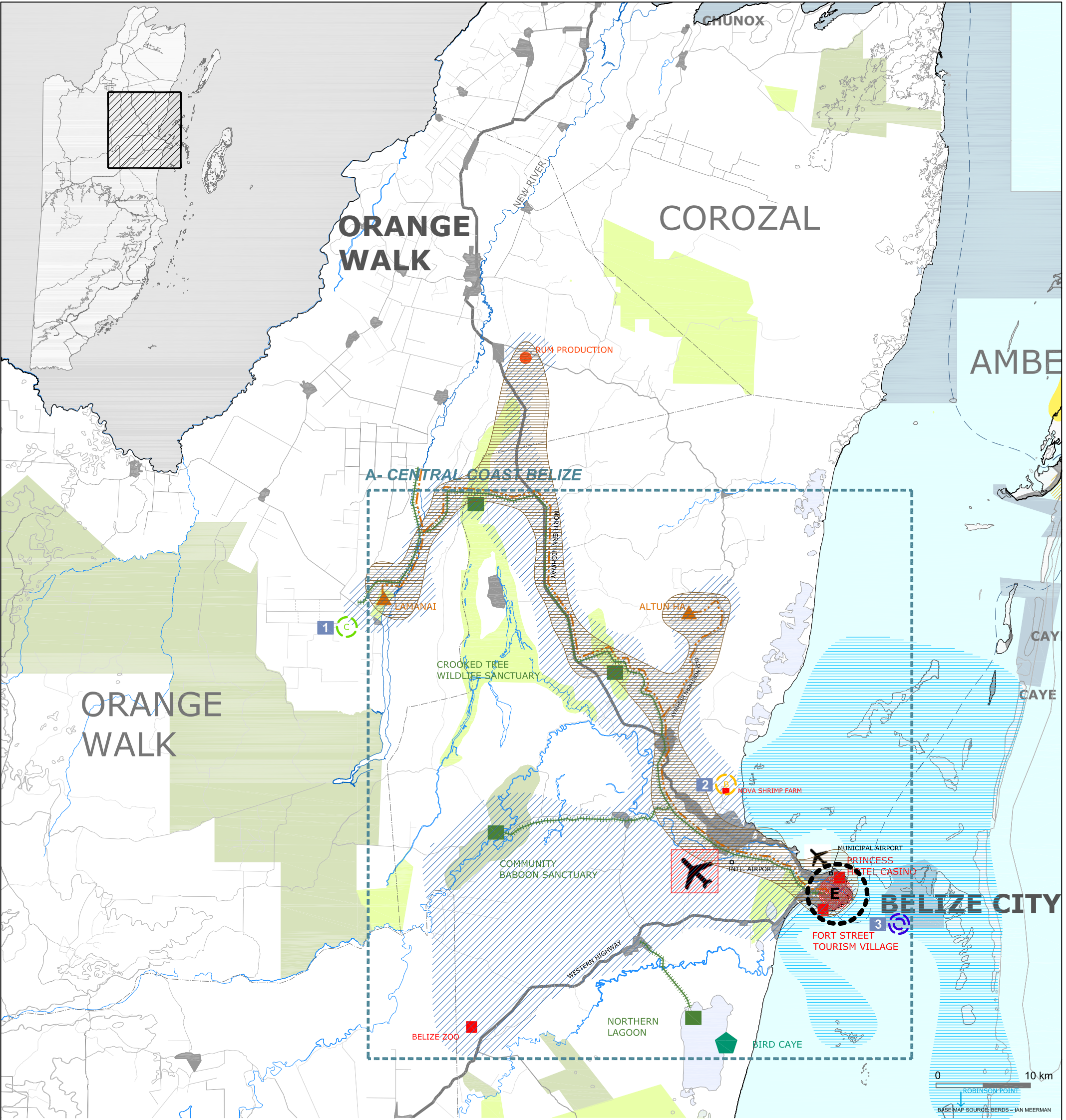
PROPOSED MODEL

-  SPECIFIC STRATEGIES

*NOTE: Definition of boundaries is approximate and only indicative for the different strategic areas

9 PHYSICAL PLAN · A · Central Coast Belize

PHYSICAL PLANNING – NATIONAL SUSTAINABLE TOURISM MASTER PLAN · BELIZE



A- CENTRAL COAST BELIZE

MODEL OF DEVELOPMENT

As for the development model there is a specific strategy for Belize City . The approach in terms of physical planning is to focus on **urban renovation of the Central Historic District neighborhood**, where at present tourism related activities do happen. Is around the Historic district and on the north side of Haulover Creek and the waterfront where we can find most of the hotels, other accommodation formulas, the cruise landing and departure areas and most of the tourism attractors in the city (museum, restaurants, Fort George street village, water taxis, boat regular services, fishermen, open air market, casino, etc.) The master plan proposes also to **develop a very low density resort around Lamanai archeological site** since it is one of the most visited attraction in the country. Considering the existing natural environment, the complex **should be design maintaining the existing character**. The proposals for the archaeological sites should include, in limited areas, the possibility to build high quality lodging because general land use areas generate revenues that can contribute with fees to maintenance

REFERENCE DENSITY

- Level 1 (around 4 units/acre - 10 units/hectare) : Lamanai archeological site
- Level 2 (up to 20 units/acre - 50 units/hectare): Nova Shimp Farm
- Level 3 (up to 40 units/acre - 100 units/hectare): Belize City

SPECIFIC STRATEGIES

AIRPORT EXTENSION AND REHABILITATION/IMPROVEMENT



- 1- OLD CENTER RENOVATION
- 2- WATERFRONT CRUISE VISITORS AREA
- 3- WATERFRONT RENOVATION
- 4- NAUTICAL MARINA HOTEL AND APARTMENTS
- 5- NEW CRUISE TERMINAL AT PORT LOYOLA

CRUISE (M.I.)

CULTURE

NAUTICAL

L&E

NOTE: Cluster of Products - Perimeters are approximate and only indicative of the main areas of influence

REFERENCE IMAGES



BELIZE CITY

ALTUN HA

NAUTICAL

MODEL OF DEVELOPMENT



PROMOTED GROWTH



MODERATE GROWTH



INFILL AND COMPLETION OF EXISTING TOWN/VILLAGE



NEW RESORT/TOWN (LOW-MEDIUM DENSITY)



NEW RESORT/TOWN (LOW DENSITY)



MAINTAIN CHARACTER WITH RESORT HOTEL (VERY LOW DENSITY)

NATIONAL SUSTAINABLE TOURISM MASTER PLAN OF BELIZE

MAY 2011

TOURISM&LEISURE EUROPRAXISCONSULTING

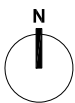


PHASE:

DEVELOPMENT PLANS AND RECOMMENDATIONS

PLAN N°:

A



LEGEND

- MAJOR ROADS
- SECONDARY ROADS
- MINOR ROADS
- MAJOR TRACKS
- FERRY ROUTE
- RIVER
- DISTRICT BOUNDARY
- INTERNATIONAL BOUNDARY

TYPE OF ATTRACTORS

- HERITAGE
- LIVING CULTURE
- MAN-MADE
- MARINE RESERVE
- RESERVES/PARKS/SANCTUARY
- CAVES
- EXISTING SETTLEMENT

TRAIL *

- MAYA TRAIL
- CAVES ROUTES
- NATURE-BASED ROUTE

*NOTE: Routes to define on detailed cartography. New trails might be added or some subtracted.

PROT-AREAS

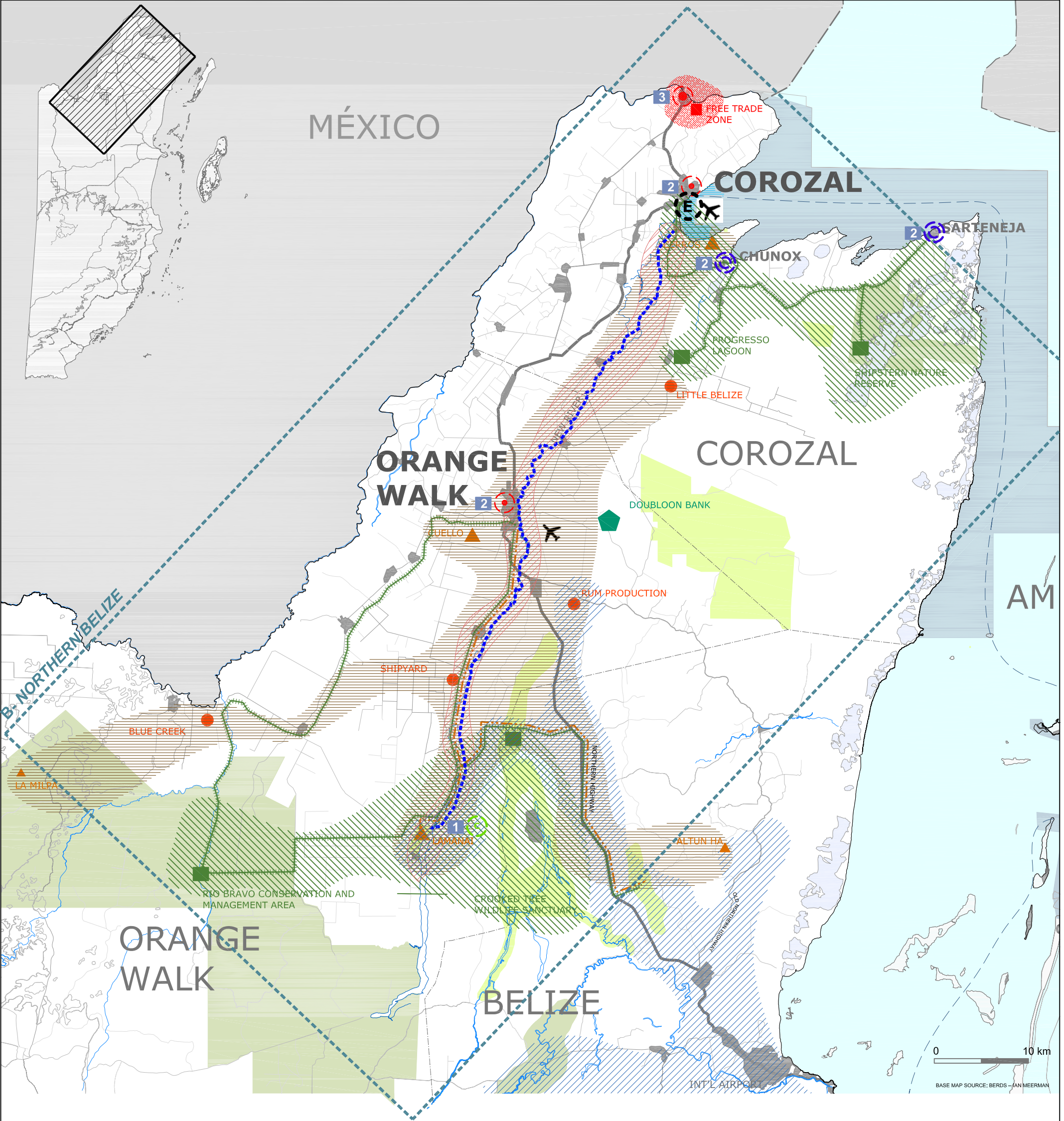
- TERRESTRIAL PROTECTED AREAS (FD)
- PRIVATE PROTECTED AREAS
- MARINE PROTECTED AREAS
- PROTECT BIRD SANCTUARY

REFERENCE DENSITY

- 1 around 4 units/ acre - 10 units/hectare
- 2 up to 20 units/acre - 50 units/hectare
- 3 up to 40 units/acre - 100 units/hectare

10 PHYSICAL PLAN · B · Northern Belize

PHYSICAL PLANNING – NATIONAL SUSTAINABLE TOURISM MASTER PLAN · BELIZE



B- NORTHERN BELIZE

MODEL OF DEVELOPMENT

As for the development model the idea is to encourage a moderate growth both for Orange Walk and Corozal, considered as base camp areas for visitors discovering the neighboring attractions and thus to increase the overnight in both towns.

Complementary to Corozal and specially around the nature-based product, the model for infill and completion of empty lands inside the towns is planned for Chunox and Sarteneja. Therefore the growth in extension should be focused on the edges of Corozal.

As being one of the goals for the destination to attract Mexican visitors, the promoted growth icon is proposed for a free trade zone. Although not always completely urbanized, the street layout has been already determined. This implies there is a big potential for growth differed in time to complete the net, provided a new gate strategy and enclosure is designed.

REFERENCE DENSITY

- Level 1 (around 4 units/acre - 10 units/hectare) : Lamanai archeological site
- Level 2 (up to 20 units/acre - 50 units/ hectare): Orange Walk, Corozal, Chunox, Sarteneja
- Level 3 (up to 40 units/acre - 100 units/hectare): Free Trade Zone (Corozal)

SPECIFIC STRATEGIES

- IMPROVEMENT AND CONSERVATION OF RIVER BANKS
- REDESIGN ACCESS TO LAMANAI TEMPLE AREA
- IMPROVEMENT COROZAL WATERFRONT
- RIVER ROUTE

- CRUISE (M.I)
- CULTURE
- NATURE-BASED
- L&E
- NAUTICAL

NOTE: Cluster of Products - Perimeters are approximate and only indicative of the main areas of influence

REFERENCE IMAGES



NATIONAL SUSTAINABLE TOURISM MASTER PLAN OF BELIZE

MAY 2011

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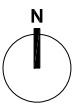
PHASE:

DEVELOPMENT PLANS AND RECOMMENDATIONS

PLAN N°:

B

PLAN: DESTINATIONS REGIONAL SCALE NORTHERN BELIZE



LEGEND

- MAJOR ROADS
- SECONDARY ROADS
- MINOR ROADS
- MAJOR TRACKS
- FERRY ROUTE
- RIVER
- DISTRICT BOUNDARY
- INTERNATIONAL BOUNDARY

TYPE OF ATTRACTORS

- HERITAGE
- LIVING CULTURE
- MAN-MADE
- MARINE RESERVE
- RESERVES/PARKS/SANCTUARY
- CAVES
- EXISTING SETTLEMENT

TRAIL *

- MAYA TRAIL
- CAVES ROUTES
- NATURE-BASED ROUTE

*NOTE: Routes to define on detailed cartography New trails might be added or some subtracted.

PROT-AREAS

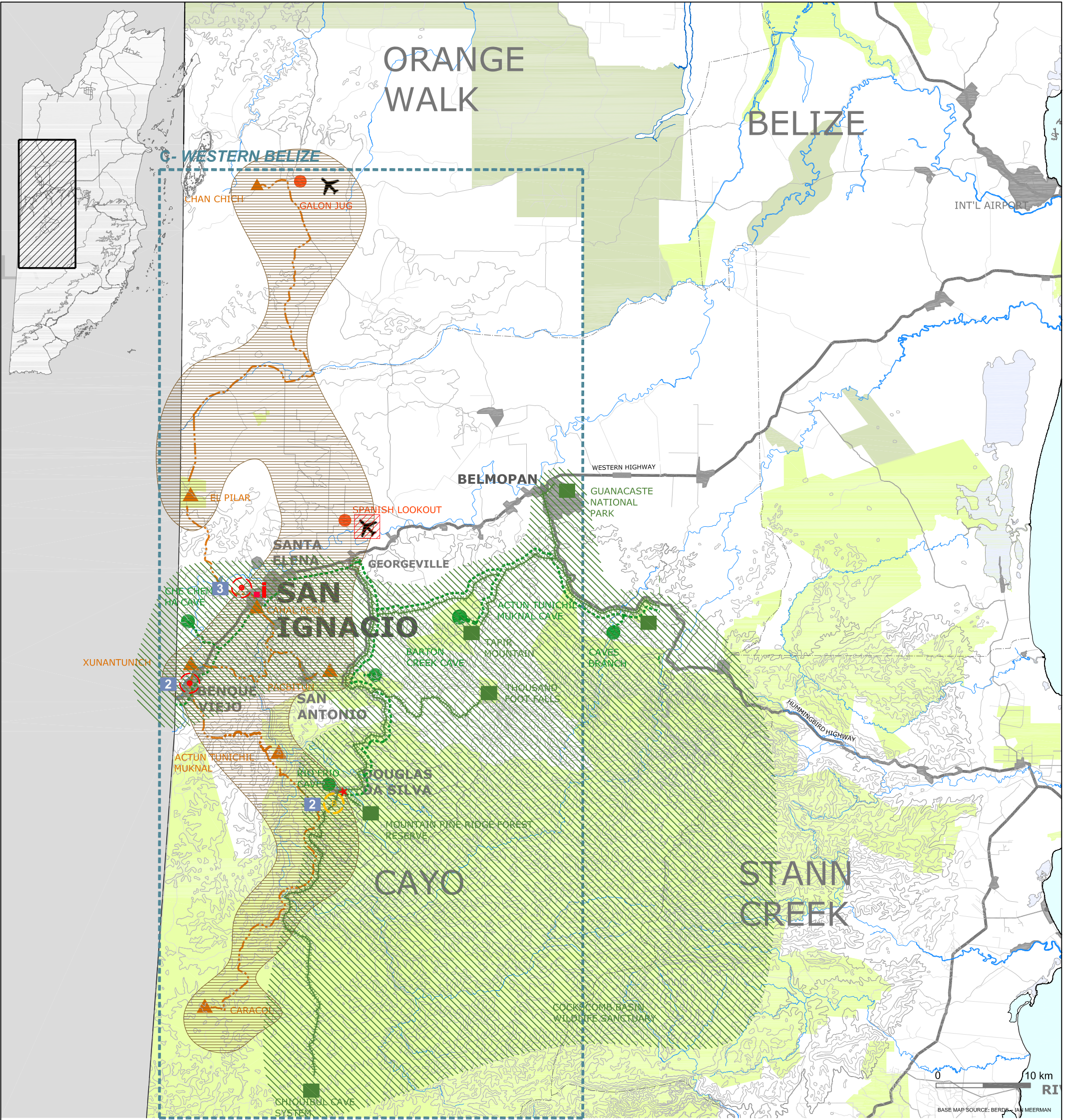
- TERRESTRIAL PROTECTED AREAS (FD)
- PRIVATE PROTECTED AREAS
- MARINE PROTECTED AREAS
- PROTECT BIRD SANCTUARY

REFERENCE DENSITY

- 1 around 4 units/ acre - 10 units/hectare
- 2 up to 20 units/acre - 50 units/hectare
- 3 up to 40 units/acre - 100 units/hectare

11 PHYSICAL PLAN · C · Western Belize

PHYSICAL PLANNING – NATIONAL SUSTAINABLE TOURISM MASTER PLAN · BELIZE



C- WESTERN BELIZE

MODEL OF DEVELOPMENT

Considering the accommodation facilities and attractions for tourists are dispersed around San Ignacio but in a vast area, the proposals for models of development consider to define **moderate growth both for Benque Viejo and San Ignacio**. Specially in the case of San Ignacio the growth in extension should be understood as something that happens punctually around its vicinity but without necessarily implying that there is an urban continuum that leads to a compact city.

As for the attractors south from San Ignacio, **Rio Frio caves, Pine Ridge and the forest area the NSTMP plans a low density new resort / town** on the area known as Douglas Da Silva. The site had been previously disturbed because there used to be an economic activity. Therefore there is no need for forest clearance. There are already some constructions and an old airstrip.

REFERENCE DENSITY

- ▶ Level 1 (around 4 units/acre - 10 units/hectare) : New eco-lodges around Cayo
- ▶ Level 2 (up to 20 units/acre - 50 units/ hectare); Benque Viejo, Douglas da Silva site
- ▶ Level 3 (up to 40 units/acre - 100 units/hectare); San Ignacio

SPECIFIC STRATEGIES

CONSTRUCTION OF A NEW AIRSTRIP NEXT TO SAN IGNACIO OR RENOVATION OF A CENTRAL FARM AIRPORT TO BE PART OF A MUNICIPAL NETWORK

PROMOTE RENOVATION AND NEW ECO-LODGES
IMPROVE CONDITION OF ROAD FROM WESTERN HIGHWAY TO DOUGLAS DA SILVA CAMP

CULTURE NATURE-BASED

NOTE: Cluster of Products - Perimeters are approximate and only indicative of the main areas of influence

REFERENCE IMAGES



NEW ANTHROPOLOGY - MULTICULTURAL ARCHEOLOGICAL SITES MUSEUM

NEW TOURISM REGIONAL INFORMATION CENTER

PLAN NEW RESORT/ADVENTURE HUB AROUND EXISTING OLD CAMP AND AIRSTRIP (DOUGLAS DA SILVA)

- MODEL OF DEVELOPMENT
- PROMOTED GROWTH
 - MODERATE GROWTH
 - INFILL AND COMPLETION OF EXISTING TOWN/VILLAGE
 - NEW RESORT/TOWN (LOW-MEDIUM DENSITY)
 - NEW RESORT/TOWN (LOW DENSITY)
 - MAINTAIN CHARACTER WITH RESORT HOTEL (VERY LOW DENSITY)

NATIONAL SUSTAINABLE TOURISM MASTER PLAN OF BELIZE

MAY 2011

TOURISM&LEISURE
EUROPRAXISCONSULTING



PHASE:

DEVELOPMENT PLANS
AND RECOMMENDATIONS

PLAN N°:

C

PLAN:
DESTINATIONS
REGIONAL SCALE
WESTERN BELIZE

LEGEND

- MAJOR ROADS
- SECONDARY ROADS
- MINOR ROADS
- MAJOR TRACKS
- FERRY ROUTE
- RIVER
- DISTRICT BOUNDARY
- INTERNATIONAL BOUNDARY

TYPE OF ATTRACTORS

- HERITAGE
- LIVING CULTURE
- MAN-MADE
- MARINE RESERVE
- RESERVES/PARKS/SANCTUARY
- CAVES
- EXISTING SETTLEMENT

TRAIL*

- MAYA TRAIL
- CAVES ROUTES
- NATURE-BASED ROUTE

*NOTE: Routes to define on detailed cartography
New trails might be added or some subtracted.

PROT. AREAS

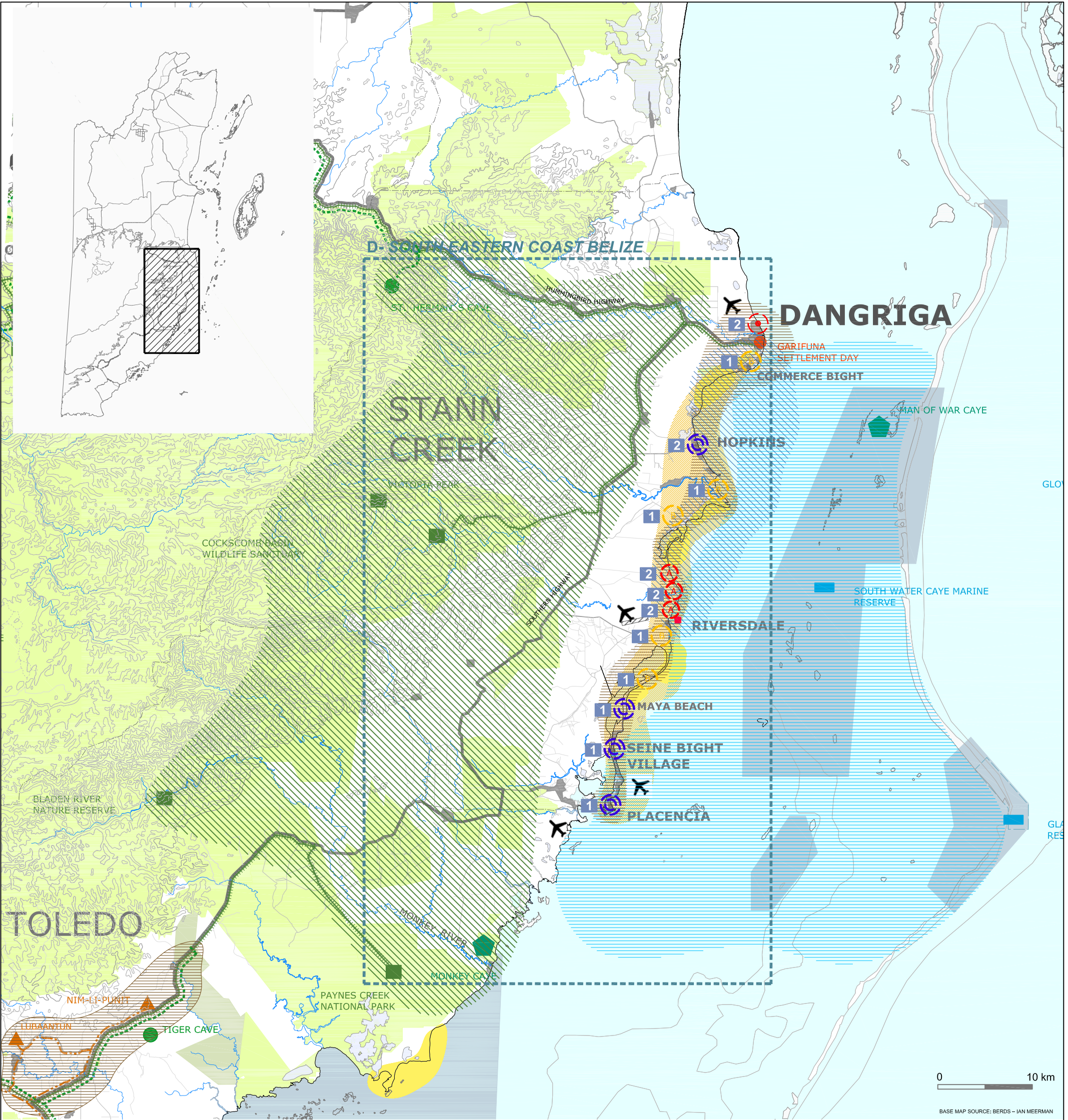
- TERRESTRIAL PROTECTED AREAS (FD)
- PRIVATE PROTECTED AREAS
- MARINE PROTECTED AREAS
- PROTECT BIRD SANCTUARY

REFERENCE DENSITY

- 1 around 4 units/ acre - 10 units/hectare
- 2 up to 20 units/acre - 50 units/hectare
- 3 up to 40 units/acre - 100 units/hectare

12 PHYSICAL PLAN · D · South Eastern Coast Belize

PHYSICAL PLANNING – NATIONAL SUSTAINABLE TOURISM MASTER PLAN · BELIZE



D- SOUTH EASTERN COAST BELIZE

MODEL OF DEVELOPMENT
Considering the potential development of the destination the Master Plans has chosen **concentrate** most of the new future developments.

The idea of the proposal for the destination would allow:

- Preservation of most of the coastline and specially the Peninsula from out of scale development
- Conservation of a very fragile ecosystem that makes the place an attraction
- Focus growth around existing settlements
- Release the pressure from real estate sector in other areas of the country

In this sense the new development, north of Riversdale up to Hopkins, is the place to limit the impacts of pocket cruise tourism. However, the Lagoon should be exempt from this. No high or mid density of development in Placencia, neither in the north.

So for the new developments the highest intensity considered that Belize can assume has been planned for part of the coastline close to the airport and just north from Riversdale.

South from Dangriga and Hopkins on previously disturbed areas with existing constructions, the model envisaged is for low density new resort / town. The same model has been considered for the built up areas just south from Riversdale at the very top of the peninsula.

For the existing settlements in Placencia Peninsula, Riversdale, Seine Bight and Placencia village, the model is infill and completion of existing towns.

REFERENCE DENSITY

- ▶ Level 1 (around 4 units/acre - 10 units/hectare) : All Placencia Peninsula, False Siltie point and around the point (south Hopkins), Commerce Bight area (south Dangriga)
- ▶ Level 2 (up to 20 units/acre - 50 units/ hectare): Dangriga, Hopkins, North of Maya King river up to Sapodilla lagoon
- ▶ Level 3 (up to 40 units/acre - 100 units/hectare): North from Riversdale and south from Maya King river

SPECIFIC STRATEGIES

- INTERNATIONAL AIRPORT UNDER CONSTRUCTION
- STANN CREEK COASTLINE DEVELOPMENT BASED ON NEW HOTELS PREDOMINANTLY
- NATURE-BASED
- CULTURAL
- NAUTICAL
- CRUISE (POCKET CR.)
- PRISTINE BEACHES
- SUN AND BEACH
- SMALL BOAT ACCESS

NOTE: Cluster of Products - Perimeters are approximate and only indicative of the main areas of influence

REFERENCE IMAGES



NATIONAL SUSTAINABLE TOURISM MASTER PLAN OF BELIZE

MAY 2011

TOURISM&LEISURE EUROPRAXISCONSULTING



PHASE:

DEVELOPMENT PLANS AND RECOMMENDATIONS

PLAN N°:

D

PLAN: DESTINATIONS REGIONAL SCALE

SOUTH EASTERN COAST BELIZE

LEGEND

- MAJOR ROADS
- SECONDARY ROADS
- MINOR ROADS
- MAJOR TRACKS
- FERRY ROUTE
- RIVER
- DISTRICT BOUNDARY
- INTERNATIONAL BOUNDARY

TYPE OF ATTRACTORS

- HERITAGE
- LIVING CULTURE
- MAN-MADE
- MARINE RESERVE
- RESERVES/PARKS/SANCTUARY
- CAVES
- EXISTING SETTLEMENT

TRAIL *

- MAYA TRAIL
- CAVES ROUTES
- NATURE-BASED ROUTE

*NOTE: Routes to define on detailed cartography. New trails might be added or some subtracted.

PROT. AREAS

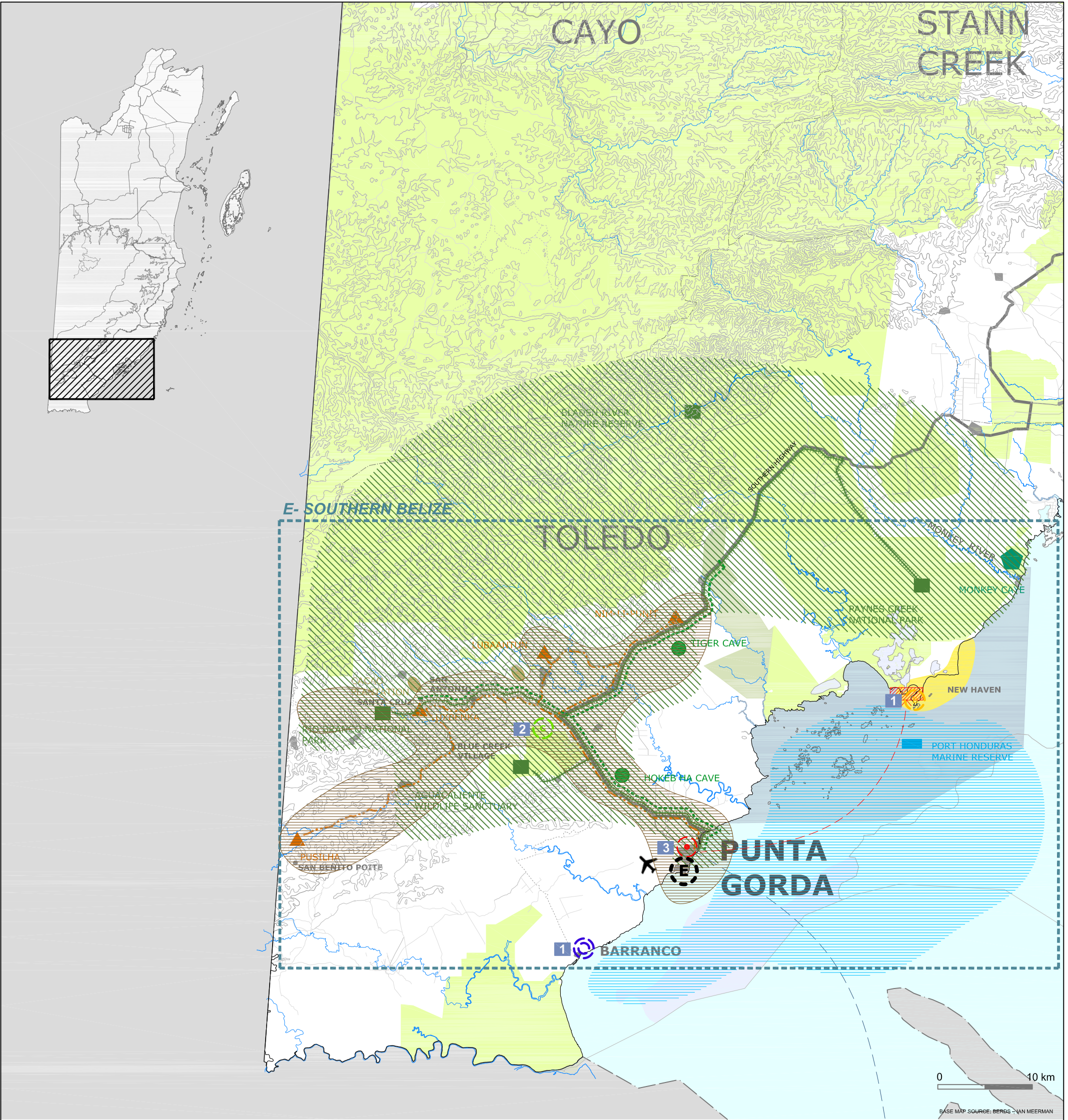
- TERRESTRIAL PROTECTED AREAS (FD)
- PRIVATE PROTECTED AREAS
- MARINE PROTECTED AREAS
- PROTECT BIRD SANCTUARY

REFERENCE DENSITY

- 1 around 4 units/ acre - 10 units/hectare
- 2 up to 20 units/acre - 50 units/hectare
- 3 up to 40 units/acre - 100 units/hectare

13 PHYSICAL PLAN · E · Southern Belize

PHYSICAL PLANNING – NATIONAL SUSTAINABLE TOURISM MASTER PLAN · BELIZE



E- SOUTHERN BELIZE

MODEL OF DEVELOPMENT

For the **existing settlements** the bulk of the new development considered in the Master Plan (new hotel rooms included on the objectives chapter) is to be placed in Punta Gorda. The model of development planned is therefore **moderate growth**. Being one of the **main proposals to develop nautical tourism**, an **infill and completion strategy** has been defined for **Barranco**. Considering the new developments, on one side, a **new resort/town (low density)** is planned for Punta Negra and, a **very low density resort hotel and a visitor center** are planned on the **crossroads of southern highway and the road to San Antonio and Santa Cruz**. As a general frame the proposals related to the Natural Protected Areas could include, in **limited areas**, the possibility to build high quality lodging because general land use areas generate revenues that can contribute with fees to maintenance

REFERENCE DENSITY

- ▶ Level 1 (around 4 units/acre - 10 units/hectare) : Barranco and Punta Negra
- ▶ Level 2 (up to 20 units/acre - 50 units/ hectare): crossroad point between Southern Highway and road to Santa Cruz
- ▶ Level 3 (up to 40 units/acre - 100 units/hectare): Punta Gorda

SPECIFIC STRATEGIES

- LOW DENSITY MARINE ECO-LODGE AT PUNTA NEGRA
- IMPROVEMENT OF INTERNATIONAL PIER (BMA). PROMOTE VISITOR CONNECTION FROM PUERTO BARRIOS
- BOAT ACCESS
- AGRO TOURISM AND RURAL TOURISM: CACAO PLANTATIONS
- PAVING AND IMPROVEMENT OF ROAD FROM GUATEMALA

- NATURE-BASED
- CULTURAL
- NAUTICAL
- PRISTINE BEACHES

NOTE: Cluster of Products - Perimeters are approximate and only indicative of the main areas of influence

REFERENCE IMAGE



CACAO PLANTATIONS MONKEY RIVER NIM-LI-PUNIT

- MODEL OF DEVELOPMENT
- PROMOTED GROWTH
 - MODERATE GROWTH
 - INFILL AND COMPLETION OF EXISTING TOWN/VILLAGE
 - NEW RESORT/TOWN (LOW-MEDIUM DENSITY)
 - NEW RESORT/TOWN (LOW DENSITY)
 - MAINTAIN CHARACTER WITH RESORT HOTEL (VERY LOW DENSITY)

NATIONAL SUSTAINABLE TOURISM MASTER PLAN OF BELIZE

MAY 2011

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PHASE:

DEVELOPMENT PLANS AND RECOMMENDATIONS

PLAN N°:

E

PLAN: DESTINATIONS REGIONAL SCALE

SOUTHERN BELIZE

LEGEND

- MAJOR ROADS
- SECONDARY ROADS
- MINOR ROADS
- MAJOR TRACKS
- FERRY ROUTE
- RIVER
- DISTRICT BOUNDARY
- INTERNATIONAL BOUNDARY

TYPE OF ATTRACTORS

- HERITAGE
- LIVING CULTURE
- MAN-MADE
- MARINE RESERVE
- RESERVES/PARKS/ SANCTUARY
- CAVES
- EXISTING SETTLEMENT

TRAIL*

- MAYA TRAIL
- CAVES ROUTES
- NATURE-BASED ROUTE

*NOTE: Routes to define on detailed cartography. New trails might be added or some subtracted.

PROT-AREAS

- TERRESTRIAL PROTECTED AREAS (FD)
- PRIVATE PROTECTED AREAS
- MARINE PROTECTED AREAS
- PROTECT BIRD SANCTUARY

REFERENCE DENSITY

- 1 around 4 units/ acre - 10 units/hectare
- 2 up to 20 units/acre - 50 units/hectare
- 3 up to 40 units/acre - 100 units/hectare



**NATIONAL SUSTAINABLE TOURISM
MASTER PLAN OF BELIZE**

MAY 2011

TOURISM&LEISURE
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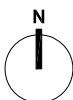
**DEVELOPMENT PLANS
AND RECOMMENDATIONS**

PLAN:

DESTINATIONS
SPECIFIC DEVELOPMENT PLAN
PUNTA GORDA

PLAN N°:

E.S



LEGEND



EXISTING SETTLEMENT



PRINCIPAL EXISTING TRACKS



MAJOR ROADS



MINOR ROADS



FUTURE BY-PASS TO SOUTHERN

1



URBAN SPACE PROJECT FOR MAIN SQUARE



REDEVELOPMENT OF CENTRAL CITY AREA ALLOCATE LAND
FOR BUILDING 2 SMALL CITY HOTELS/GUESTHOUSES



PROMOTE NAUTICAL TOURISM FACILITIES AROUND PUNTA GORDA
COASTLINE AS AN INDICATIVE PROPOSAL(**a**):NEW MARINA RESORT
(HOTEL +RESIDENTIAL UNITS)



IMPROVEMENT OF INTERNATIONAL PIER (BMA).
PROMOTE VISITOR CONNECTION FROM PUERTO BARRIO

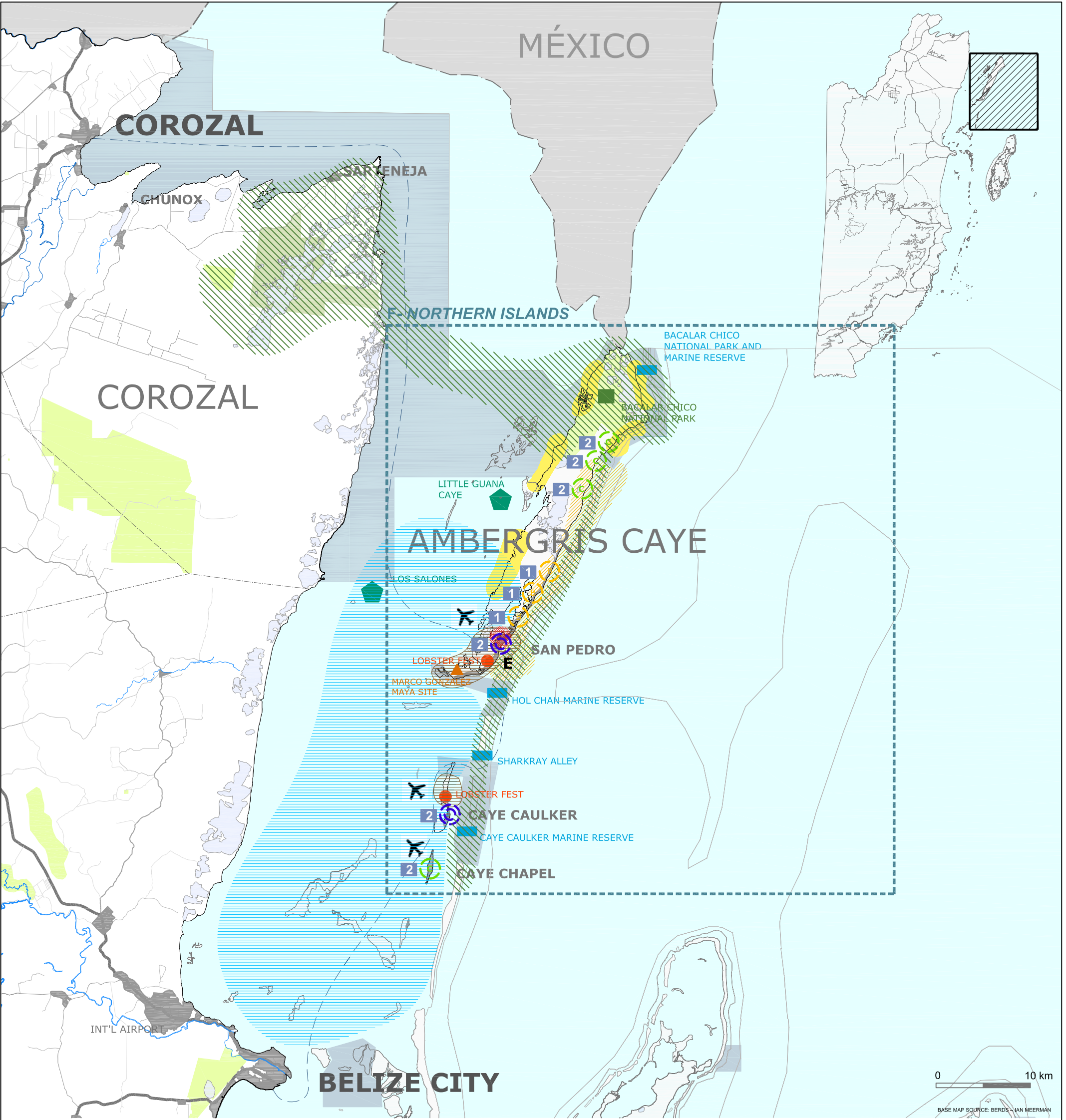
2



TWO NEW LOW DENSITY ECO-LODGES IN PROXIMITY TO
TOURISM ATTRACTIONS AND A NEW VISITOR CENTER

14 PHYSICAL PLAN · F · Northern Islands

PHYSICAL PLANNING – NATIONAL SUSTAINABLE TOURISM
MASTER PLAN · BELIZE



F- NORTHERN ISLANDS

MODEL OF DEVELOPMENT

In terms of development the conceptual principle for the northern islands destination is to **constrain the development and consolidate and improve what it has already been built**. The existing settlements in Caye Caulker and Ambergris Caye are defined as Infill and completion of existing town / village.

For the proposed 474 new hotel rooms two different strategies are put in place. On the **north tip of Ambergris Caye** three **very low density resort hotels** are planned outside from Bacalar Chico National Park. In order to minimize the impacts on the environment the **areas chosen have been previously disturbed**.

On second place the plan proposes some **small low density new developments** off the main road leading north and after the bridge north from San Pedro. The idea is to **complete** some of the areas that have already been **recently urbanized**. In **Ambergris Caye** this study proposes to develop studies to **convert into hotel units the empty apartments or unfinished compounds built around the main road north from San Pedro**.

REFERENCE DENSITY

- ▶ Level 1 (around 4 units/acre - 10 units/hectare) : New developments north of San Pedro
- ▶ Level 2 (up to 20 units/acre - 50 units/ hectare): San Pedro, Caye Caulker, 3 designated ares north Ambergris Caye

SPECIFIC STRATEGIES

- E**
- 1-IMPROVE QUALITY OF EXISTING HOTELS
 - 2- DEFINE LAGOON ACCESS FOR TOURS, TAXIS, DELIVERIES.
 - 3- REDEVELOP MULTIPURPOSE OPEN SPACE
 - 4- DEFINE PUBLIC SPACE PROJECTS TO PROMOTE PEDESTRIAN FLOWS

- NATURE-BASED
- CULTURAL
- NAUTICAL
- L&E
- PRISTINE BEACHES
- SUN AND BEACH

NOTE: Cluster of Products - Perimeters are approximate and only indicative of the main areas of influence

REFERENCE IMAGES



AMBERGRIS CAYE



BACALAR CHICO



CAYE CAULKER

- MODEL OF DEVELOPMENT
- PROMOTED GROWTH
 - MODERATE GROWTH
 - INFILL AND COMPLETION OF EXISTING TOWN/VILLAGE
 - NEW RESORT/TOWN (LOW-MEDIUM DENSITY)
 - NEW RESORT/TOWN (LOW DENSITY)
 - MAINTAIN CHARACTER WITH RESORT HOTEL (VERY LOW DENSITY)

NATIONAL SUSTAINABLE TOURISM MASTER PLAN OF BELIZE

MAY 2011

TOURISM&LEISURE
EUROPRAXISCONSULTING

BTB
BELIZE TOURISM BOARD

PHASE:

DEVELOPMENT PLANS
AND RECOMMENDATIONS

PLAN N°:

F

PLAN:
DESTINATIONS
REGIONAL SCALE
NORTHERN ISLANDS

LEGEND

- MAJOR ROADS
- SECONDARY ROADS
- MINOR ROADS
- MAJOR TRACKS
- FERRY ROUTE
- RIVER
- DISTRICT BOUNDARY
- INTERNATIONAL BOUNDARY

TYPE OF ATTRACTORS

- HERITAGE
- LIVING CULTURE
- MAN-MADE
- MARINE RESERVE
- RESERVES/PARKS/ SANCTUARY
- CAVES
- EXISTING SETTLEMENT

TRAIL*

- MAYA TRAIL
- CAVES ROUTES
- NATURE-BASED ROUTE

*NOTE: Routes to define on detailed cartography
New trails might be added or some subtracted.

PROT-AREAS

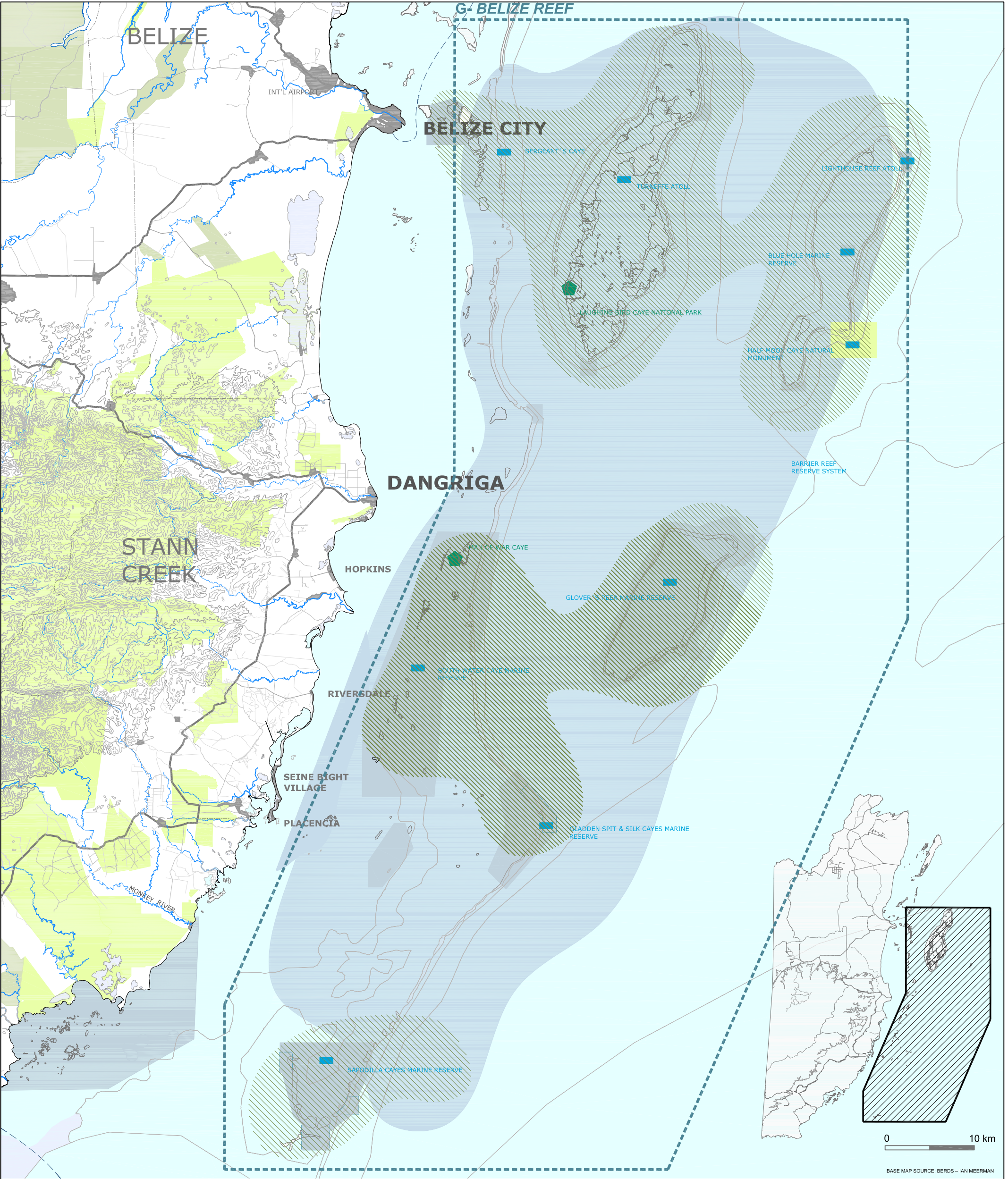
- TERRESTRIAL PROTECTED AREAS (FD)
- PRIVATE PROTECTED AREAS
- MARINE PROTECTED AREAS
- PROTECT BIRD SANCTUARY

REFERENCE DENSITY

- 1 around 4 units/ acre - 10 units/hectare
- 2 up to 20 units/acre - 50 units/hectare
- 3 up to 40 units/acre - 100 units/hectare

15 PHYSICAL PLAN · G · Belize Reef

PHYSICAL PLANNING – NATIONAL SUSTAINABLE TOURISM
MASTER PLAN · BELIZE



G- BELIZE REEF

MODEL OF DEVELOPMENT

Only allow improvements and small enlargements for existing tourism facilities to complete maximum growth allocated of 44 new hotel room
The proposed strategy for conservation is to establish and promote a day visitation formula

REFERENCE DENSITY

- ▶ Level 0: all the destination, except what is considered as level 1
- ▶ Level 1 (around 4 units/acre - 10 units/hectare) : extension of existing resorts

REFERENCE IMAGES



BLUE HOLE



HALF-MOON



BARRIER REEF



TURNEFFE ATOLL

SPECIFIC STRATEGIES

NOTE: ONLY ALLOW IMPROVEMENTS AND SMALL ENLARGEMENTS FOR EXISTING TOURISM FACILITIES TO COMPLETE MAXIMUM GROWTH ALLOCATED.

- NATURE-BASED
- NAUTICAL

NOTE: Cluster of Products - Perimeters are approximate and only indicative of the main areas of influence

NATIONAL SUSTAINABLE TOURISM MASTER PLAN OF BELIZE

MAY 2011

TOURISM&LEISURE
EUROPRAXISCONSULTING



PHASE:

DEVELOPMENT PLANS AND RECOMMENDATIONS

PLAN N°:

G

LEGEND

- MAJOR ROADS
- SECONDARY ROADS
- MINOR ROADS
- MAJOR TRACKS
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- HERITAGE
- LIVING CULTURE
- MAN-MADE
- MARINE RESERVE
- RESERVES/PARKS/ SANCTUARY
- CAVES
- EXISTING SETTLEMENT

PROTECTED AREAS

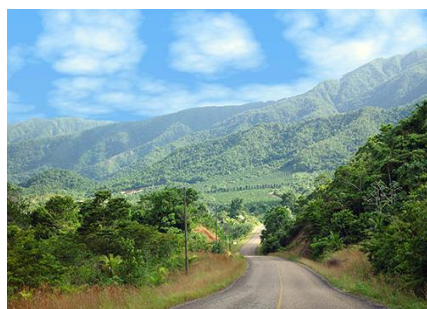
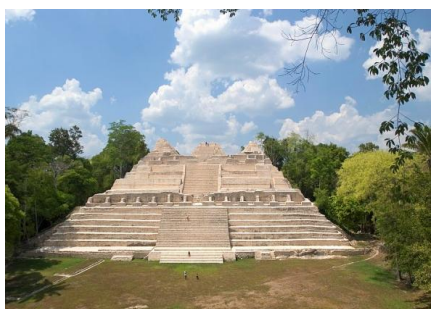
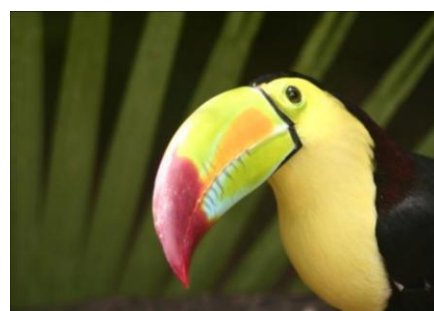
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NATIONAL SUSTAINABLE TOURISM MASTERPLAN FOR BELIZE 2030

Introduction to the Tourism Master Plan Macro Programs



June, 2011

Introduction to the Tourism Master Plan Macro Programs

The following section of the Sustainable Tourism Master Plan develops the tasks to implement in order to reach the overall goals of optimization, leadership, sustainability and competitiveness of the Belizean destinations through the guiding principal of the strategic approach.

Each macro program focuses on the core components of the Belizean tourism sector designed to achieve specific quantitative and qualitative tourism objectives. The master plan's areas of focus are:

1. Tourism Governance
2. Tourism Sustainability and Quality Assurance
3. Tourism Infrastructures
4. Tourism Marketing
5. Tourism Product development

This structure of the master plan was chosen in order to:

1. Provide four umbrella macro programs (governance, sustainability and quality assurance, infrastructures, marketing) and one integral macro program (consisting of six tourism product programs) including transversal development projects. This structure will assure (even in case of reduced financing resources) the development of the tourism products and its specifics required in terms of governance, sustainability, quality assurance, infrastructure and marketing.
2. Develop and deliver manuals for specific development leaders and implementers. E.g. the macro program for tourism marketing should be implemented and lead by BTB, the product development macro program by BTB's product managers, and the tourism governance macro program should be implemented by MTCAC in cooperation with BTB.
3. Assure tourism sustainable development by including and partnering with different institutions and executors to implement and secure stakeholders support to develop programs and projects.

As far as the structure of the Product Development Macro-program, it will allow dissection of the product development approach and ease Product manager understanding of the different components to address in product development and with what actors/stakeholders they need to interact with to develop each core area. In the case of reduced budget where umbrella programs cannot be devised, sub-programs for priority products can be developed separately. Finally, it is designed to reach competitiveness in tourism product development sooner in the case of budget constraints. If there are restraints in the budget, resources can continue to be allocated in priority product business development to continue tourism growth

The following graph presents the phases of the Sustainable Tourism Master Plan development. As indicated earlier the action plan is the result of the diagnostic of the tourism sector and the definition of the strategic framework for tourism development in Belize. The subsequent documents describe the components of component C of the NSTMP in the diagram below:



Within the action plan, the projects are dedicated to the development of the tourism sector on two levels: strategic and operational. Although all macro programs work on both levels some of them are dedicated more specifically to the strategic level such as The National Tourism Governance, the Sustainability and Quality Assurance and the Tourism Marketing Macro Programs. On the other hand the Tourism Infrastructure and the Product Development Macro Programs are focused on the operational aspects such as improvement of the tourism facilities and business growth.

Each macro program is composed of programs with subsequent subprograms which focus on developing particular projects of the tourism Master plan for Belize. The programs are designed to respond to specific gaps and constrained found during the diagnostic phase. Each program is described through its 2030 vision, lead stakeholders, implementation components, objectives and key milestones. The tasks of each of these subprograms are clearly defined as implementable projects, scheduled, budgeted and key players defined.

List of Acronyms and Abbreviations

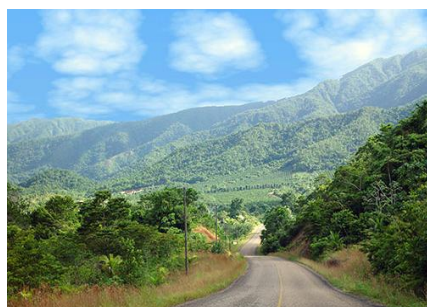
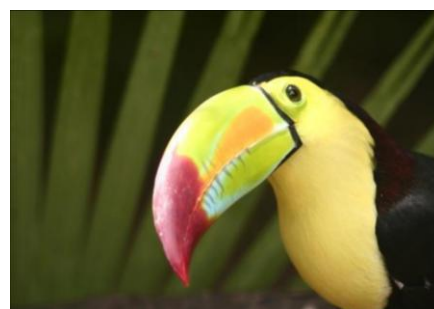
APAMO	Association of Protected Areas Management Organization
BAS	Belize Audubon Society
BELTRAIDE	Belize Trade and Investment Development Service
BERT	Belize Emergency Response Team
BETA	Belize Eco-tourism Association
BHA	Belize Hotel Association
BMA	Border Management Agency
BNTOA	Belize National Tour Operator Association
BOO	Build – Own - Operate
BOT	Build – Operate - Transfer
BPA	Belize Ports Authority
BTB	Belize Tourism Board
BTGA	Belize Tour Guides Association
BTIA	Belize Tourism Industry Association
BWBS	Belize Western Border
BZD	Belize Dollar
CAGR	Compound Annual Growth Rate
CBB	Central Bank of Belize
CCB	Central Coast Belize
CZMAI	Coastal Zone Management Authority & Institute
DFC	Development Finance Corporation
DNM	National Directorate of Migration
DOE	Department of the Environment
EIA	Environmental Impact Assessment
F&B	Food & Beverage
FAM	Familiarization Trip
FCCA	Florida-Caribbean Cruise Association
FD	Forest Department
FDI	Foreign Direct Investment
FIT	Free Independent Traveler
FONATUR	Fondo Nacional de fomento de Turismo (Mexico)
FTZ	Free Trade Zone
FUNGETUR	Fondo General do Turismo (Brazil)
GDP	Gross Domestic Product
GST	Goods and Services Tax
IADB	Inter-American Development Bank
ID	Immigration Department
IICA	Inter-American Institute for Cooperation on Agriculture
INEC	National Institute of Statistics and Censuses
IOA/ IA	Belize's Institute of Archaeology
IQM	Tourism Integrated Quality Management
ITVET	Institute for Technical Vocational Education and Training (Belize)
LDO	Lease – Develop - Operate
LUA	Land Use Authority
MIS	Marketing Intelligence System
MNRE	Ministry of Natural Resources and the Environment
MOED	Ministry of Economical Development
MOTCAC	Ministry of Tourism, Civil Aviation and Culture
NB	Northern Belize
NEAC	National Environmental Appraisal Committee
NEMO	National Emergency Management Organization

Introduction to the Tourism Master Plan Macro Programs • National Sustainable Tourism Master Plan of Belize

NICH	National Institute of Culture and History
NSSTP	National Safety & Security Tourism Plan
NSTTF	National Sustainable Tourism Trust Fund
NTSL	National Transportation Services Limited
PACT	Protected Areas Conservation Trust
PFB	Programme for Belize
PFETS	Strategic Federal Sustainable Tourism Plan
PGA	Punta Gorda (Southern) Seaport
PGIA	Philip S.W: Goldson International Airport
PPP	Private Public Partnership
SCK	Stann Creek (Southern) Seaport
SEA	Southern Environmental Association
SECB	South East Coast Belize
SIB	Statistical Institute of Belize
SLA	Santa Elena (Northern) Border Station with Mexico
SME	Small and Medium Enterprise
STP	Sustainable Tourism Program of Belize
SWMA	Solid Waste Management Authority
TDCMC	Tourism Disaster & Crisis Management Committee
TIC	Tourism Information Center
TIDE	Toledo Institute for Development and Environment
TPU	Tourism Police Unit
TVC	Tourism Visitor Center
TWC	Tourism Welcome Center
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNFCC	United Nations Framework Convention on Climate Change
UNWTO	United Nations World Tourism Organization
VAT	Value Added Tax
VEMS	Belize Visitor Expenditure and Motivation Surveys
WCTS	Waste Collection and Transfer Station
WB	World Bank
WWF	World Wide Fund for Nature

NATIONAL SUSTAINABLE TOURISM MASTERPLAN FOR BELIZE 2030

National Tourism Governance Macro Program



June 2011

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1. National Tourism Governance Macro Program

The National Tourism Governance Macro Program comprises of programs directed at raising the quality standards of the tourism service offering in order to reach international market demand standards and assure sustainable development of tourism economic resources.

There are four programs described:

1. Global governance and Management
2. Tourism Policy
3. Tourism Satellite Account
4. Tourism Safety and Security

The global governance and management program countenances the need to launch a process to coordinate all the players who have any kind of effect on Tourism, something to be done through the design of a Global Governance System for the management of tourism at a country level.

The tourism policy program develops crucial tools for Lobbying and partnering, Regulatory and financial instruments, and Public-Private Partnership models.

The tourism satellite account program develops Belize's TSA which will be the reference for organizing the system of tourism statistics, and the scope of the action plan is to define the programs that have to be undertaken to set up a TSA on a regular year base accounting system.

The tourism safety and security program addresses the need to protect visitor wellbeing by tourism proactive policing and appropriate response mechanisms. Ultimately it aims at increasing the perception that Belize is a safe destination in the international market.

Program for Global Governance and Management

Gaps identified - Diagnostic

Main conclusions from the governance and policy analysis assessment raise the following issues:

- ▶ The Ministry of Tourism and BTB do not have the desired power of influence, since certain key stakeholders such as the Ministry of Works and the Ministry of the Environment do plan their own policies, and projects for implementation, without considering the input from the tourism sector.
- ▶ Further involvement in tourism policy definition of key stakeholders such as the Ministry of Works and the Ministry of Natural Resource and the Environment is clearly needed, due to the high impact of their duties into the tourism sector.
- ▶ There are no clear criteria as to the eligibility of BTB's Board members. The Governance structure of BTB's Board should be composed of members representing interest groups, associations and most relevant groups from the Belizean tourism sector. These positions should be represented by association's president or their highest representative in duty and therefore avoiding as much as possible individual interests.
- ▶ BTB's general approach to participatory governance is to involve Belize tourism stakeholders as much as possible through participatory processes. However, involvement should not be limited to policy definition but also in implementation phases.
- ▶ BTB has limited responsibilities to manage Belize as a tourism destination, since the scope of work of BTB is constrained basically to marketing, registration/ licensing and capacity building issues.
- ▶ BTB is under-resourced to face the present and future challenges. The organization should be implementing a funding mechanism encompassing core government funding together with BTB's own resource generation and contributions from the private sector.
- ▶ Limited presence of BTB throughout the country, since a part of their headquarters in Belize City, the organization is only present in San Pedro, and thus tourism visitor centers are not available in other relevant districts of the country.
- ▶ Certain BTB departments have limited functions and some relevant activities are not being undertaken by the organization:
 - Even though a Destination Development unit exists, their responsibilities are limited to quality assurance and training, rather than identifying product development gaps and strengthening Belizean tourism products.
 - Even though, there is a marketing focused team within BTB, it is not structured to achieve quantifiable results through dynamic segmentation, which means commercializing custom-made tourism products to target customers. Therefore, they need cutting-edge marketing segmentation to help them foresee, understand, and master the new markets to come.
 - BTB does not have a department within the organization responsible for developing new tourism facilities and services, ensuring appropriate basic and transport infrastructures, and fostering SME's development.
 - Even though BTB cooperates to a certain grade with the private sector, it is encouraged to use a networked model as a lever to create a new solution and transform existing operations.

National Sustainable Tourism Master Plan for Belize 2030 • National Tourism Governance Macro Program

Issues such as product development, commercialization, development of facilities, etc. should be developed together with qualified partners to provide greater value to tourists, as well as the private sector and Belizean civil society.

To achieve the objectives set at the master plan, it remains necessary to develop and strengthen the institutional framework of tourism, providing the tools for an effective and efficient leadership to meet the challenges posed by a sustainable tourism model for the country.

The governance of tourism is instrumental for a management of tourist destinations in coordination with public, private and civil players. In this regard, coordination in the sphere of tourism is critical at all levels, as it is a cross-cutting activity which has a deep effect on society. The convergence of the different interests with the vision of sustainability set by the tourism master plan of Belize must be one, if not the prime instrumental objective.

Vision 2030

Government will foster a positive environment for the tourism sector and meaningful local participation in the sector; the tourism sector planning and management will be based on partnerships and collaboration; development of the tourism sector will be market-driven; all tourism activity will be designed to improve the quality of life enjoyed by Belize's citizens. Additionally, the sector will benefit from a revenue stream of sustainable funds for promoting productive infrastructure investment, growth in product development, and encouraging better management of tourism resources.

Description of the program

The Program countenances the need to launch a process to coordinate all the players who have any kind of effect on tourism, something to be done through the design of a Global Governance System for the management of tourism at a country level.

The creation of a **Global Governance and Management Structure for Tourism Development in Belize** responds to the previously designed strategic framework, which should be placed under the responsibility of the Government of Belize, and particularly the Ministry of Tourism and Civil Aviation, to make it happen.

The Ministry of Tourism and Civil Aviation should take the responsibility to set up and drive the Integrated Tourism Governance and Management system with the collaboration and support of:

- ▶ BTB at national level as a main player for promotion of tourism
- ▶ Municipalities throughout Belize
- ▶ Entrepreneurs and businesses composing the private sector and particularly relevant associations such as BTIA and BHA.
- ▶ Representatives of the civil society

As described in the strategic framework, the Tourism Governance System is designed at national and regional/ local scope on both strategic and operational levels.

The following framework is proposed as the ideal governance and management framework to develop tourism in Belize, and the Action Plan has been designed accordingly.

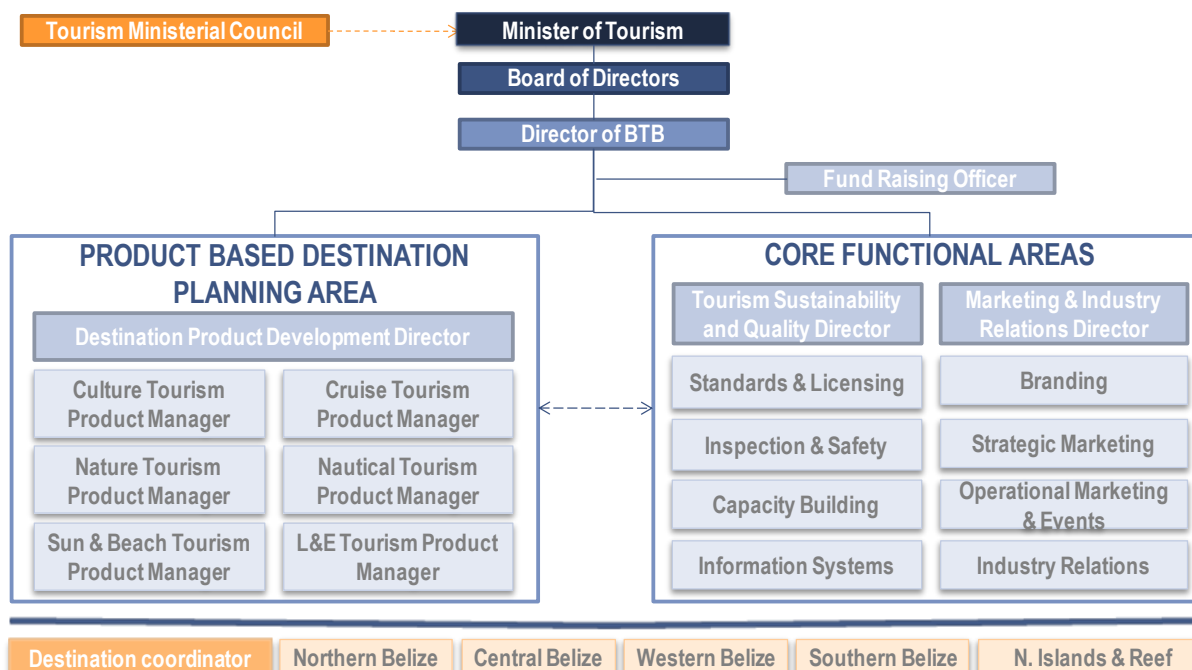
National Sustainable Tourism Master Plan for Belize 2030 • National Tourism Governance Macro Program

As previously stated, **Belize Tourism Board (BTB)** is working as the main destination marketing and quality enhancement organization in Belize. At the moment no entity is in charge of product development, which is a core activity in tourism completing the activities on marketing and quality BTB is undertaking. Product development is understood to be as designing and developing a portfolio of actions aiming to have well-developed quality products to be sold to source targeted markets. BTB, by having such double quality/ marketing vision, and since actions are already taken towards developing certain product (cruise tourism), should widen its scope by creating a specific group in charge of designing actions with the aim of developing Belize's portfolio of tourism products. Three focus areas should be within the organizational scope of BTB:

- ▶ **Functional areas:** Quality Enhancement (standards & licensing, inspections & security, capacity building and information systems) and Marketing and Industry Relations (branding, strategic marketing, operational marketing & events, and industry relations).
- ▶ **Product development area:** assigning a management team lead by a Product Development Director the responsibility to develop each of the core tourism products Belize would be selling to the source markets (nature tourism, culture tourism, cruise tourism, sun & beach tourism, nautical tourism, and leisure & entertainment tourism)
- ▶ **Fund raiser:** Aims to create a sustainable organization that will continue to have resources needed to fulfill its needs. The role is to ensure that the fundraising capacity of the organization will keep pace with programming needs and securing funds for short-term or long-term projects.

Those management units within the BTB organizational chart would be supported on field by the destination coordinators representing both BTB and NSTTF. The NSTTF can be understood as the entity that carries out the product development 'hard' components (ie infrastructure, financing, land use policy), where as the BTB Destination Product Development Department would be responsible of the 'soft' components (ie strategies, content and operational activities).

Belize Tourism Board (BTB) Organizational Chart *Source: T&L, 2011*



National Sustainable Tourism Master Plan for Belize 2030 • National Tourism Governance Macro Program

Regarding the mechanisms to promote Governance, the **National Board of BTB** should be strengthened to integrate all three-representative groups (public sector, private sector and civil society) at the decision making level, but particularly the public sector which is presently under-represented. **Destination coordinators** should also be established on a voluntary basis to capture relevant feedback from major regional stakeholders and share them with the National Board for taking appropriate action at national and regional levels with the right priority scale.

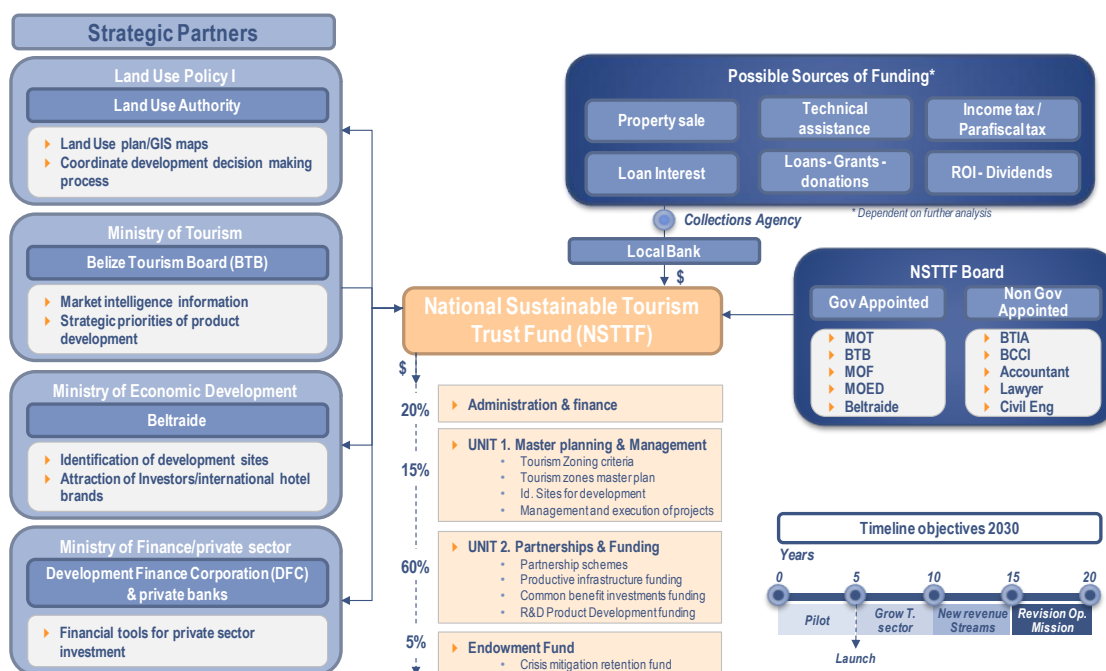
As a National Advisory Body, a **Tourism Ministerial Council** should be created, it would act as a high-level decision-making tool integrating ministers from relevant portfolios of the Government of Belize whose ministerial policies and initiatives have an impact on Belize's tourism. The aim of creating the council is to commit and to align Ministers from relevant portfolios composing the Government towards working and allocating economic resources for Belize tourism development priority projects.

Within the scope of the master plan, it is of great importance to create a National Sustainable Tourism Development Trust Fund to promote investment, growth and development in the tourism sector, encouraging better management of tourism resources, while supporting The National Sustainable Tourism Master Planning. These issues would be covered by the creation of **Belize National Sustainable Tourism Trust Fund (NSTTF)** leading the tourism activity on two main issues:

- ▶ Land use master planning of the destinations/ sites where tourism is being developed
- ▶ To flow productive economic investments to destinations according to the approved strategic tourism development models at each destination

Hence, NSTTF would be designed to as a fund for master planning and management of tourism zones as well as identifying and selecting projects for investment with strong national impact.

General framework of Belize National Sustainable Tourism Trust Fund (NSTTF) *Source: T&L, 2011*



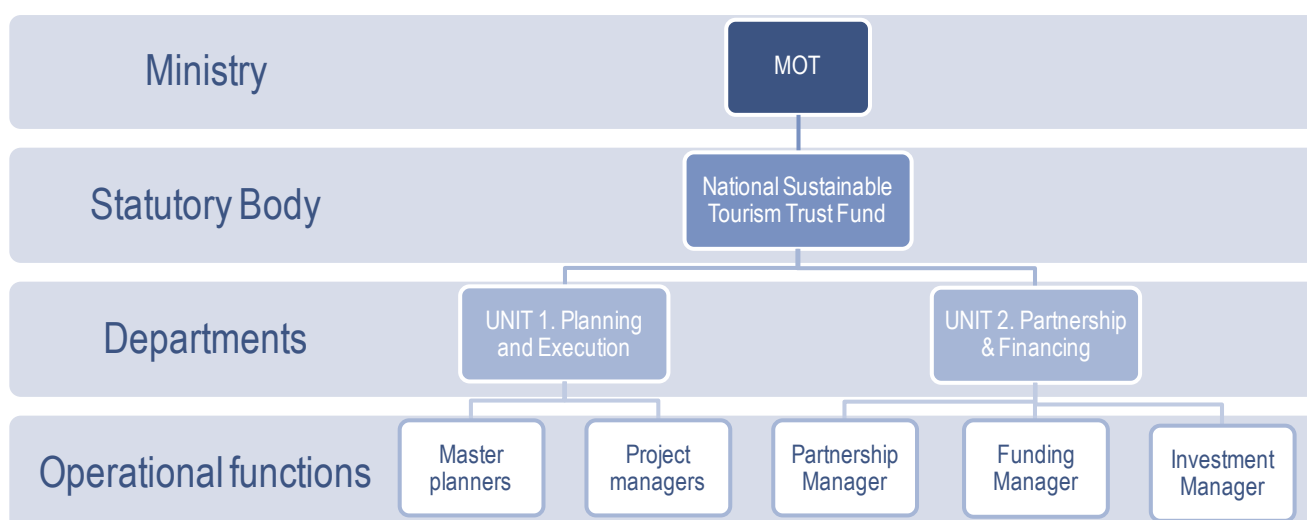
The concept how NSTTF should be designed is presented as follows:

- ▶ NSTTF Board of Trustees: There should be no less than 7 and no more than 13 members with a balance between government appointed and nongovernment appointed.
- ▶ In order to assure effectiveness of the NSTTF mandate, efficient and constant coordination between the following agencies need to be carried out:
 - Land Use Authority¹: Designation of tourism zones and approval of development sites.
 - Belize Tourism Board: Market information for tourism zoning criteria and master planning tourism sites. Investment priority of tourism projects.
 - Beltraide: Identification of business opportunities for foreign investors and attraction of foreign investment and international hotel brands.
 - Development Finance Institution & Other private Banks: Identification and delivery of appropriate financial tools needed for private sector investment in tourism business development.
- ▶ The NSTTF would function with two operational units:

Unit 1. Tourism Zoning Master Planning and Management: Responsible for tourism destination master planning and management and execution of projects.

Unit 2. Partnerships and Financing: Responsible for devising partnership schemes and searching for potential partners, management of the trust fund sources, and allocation of funds.

Belize National Sustainable Tourism Trust Fund (NSTTF) Organization Chart



Source: T&L, 2011

¹ Land Use Authority, specific government ministry, department or statutory body that will oversee the implementation of the **National Land Use Policy** and host the **National Integrated Planning Framework** for Land Resource Development and the **Land Suitability Mapping System for Belize**; currently foreseen to be ready by mid-2011.

National Sustainable Tourism Master Plan for Belize 2030 • National Tourism Governance Macro Program

Furthermore governmental efforts should strive to create a sound and **competitive investment climate, enhance foreign investment promotional and facilitation activities and encourage professionalization of tourism SME local community** Efforts should be channeled through Belize's already constituted Investment Promotion Agency (IPA) - *Beltraide*.

Lead stakeholder

All three organizations (BTB, NSTTF and BELTRAIDE) should be closely linked as the main stakeholders leading the different activities towards a successful tourism development. A synthesis of the issues each of them should be responsible of are:

- ▶ **BTB:** marketing/ product development/ quality development
- ▶ **NSTTF:** master planning/ partnership development/ tourism works coordination
- ▶ **BELTRAIDE:** investment promotion and business development

An appropriate coordination among these organizations requires first a clear understanding of each entity's role, and secondly good communication. These could be translated into the following:

- ▶ BTB should be transmitting to NSTTF the scale of priorities for product development investments according to the set criteria, hence affecting priorities on project implementation. NSTTF would report BTB on planning and work results.
- ▶ BTB should be sharing with BELTRAIDE the strategic tourism models for each destination, hence affecting the profile of investor that BELTRAIDE should be targeting for each site. BELTRAIDE should report BTB on the product development gaps that should be covered to successfully attract investors.
- ▶ NSTTF would provide BELTRAIDE a full-list of the projects/ sites ready for investment. Those sites should be part of a priority product development project. BELTRAIDE should provide NSTTF a portfolio of investors willing to commit investment on such projects/ sites.
- ▶ Land Use Authority (LUA) is also playing a key role for the achievement of NSTTF objectives. NSTTF should coordinate closely with LUA by providing the criteria used for tourism zoning, and also the results of the site tourism master planning undertaken by NSTTF. LUA should provide feedback to NSTTF on the results of the development activity of land-use policies and planning.
- ▶ Finally, NSTTF should also coordinate with other public entities (Ministry of Works, Ministry of Education, Department of Environment, NICH, NEMO, etc.) on a project-based basis. Cooperation with such entities would apply when a project requires some action to be undertaken by other organizations.

Objectives

- ▶ To increase tourism GDP by providing an integrated organizational framework for implementing the programs described in the NSTMP that will ultimately support the sustainable tourism growth of Belize.
- ▶ To increase competitiveness of the tourism sector through an integrated geographical governance and management framework at national and regional and levels
- ▶ To increase tourism intensity by leading the tourism sector through a market-driven product development approach

National Sustainable Tourism Master Plan for Belize 2030 • National Tourism Governance Macro Program

- ▶ To increase investment in tourism productive infrastructure by creating a sustainable funding mechanism for continual investment in tourism expansion
- ▶ To increase Foreign Direct Investment (FDI) and hotel development through a structured investment attraction mechanism
- ▶ To boost local economic development through tourism income by professionalization of the sector

Milestones

Review Years	Milestones
2015	<ul style="list-style-type: none"> ▶ Council of Ministers have been established ▶ BTB strengthened in terms of organization and functions ▶ Destination product managers are working within BTB ▶ Fund raiser position within BTB has been established ▶ Regional coordinators have been identified and established ▶ NSTTF pilot phase has been launched ▶ Investment attractions is under progress, with all frameworks and supporting services in place ▶ New SME's service center has been created
2020	<ul style="list-style-type: none"> ▶ The National Sustainable Tourism Trust Fund is in place
2025	<ul style="list-style-type: none"> ▶ All sub-programs under progress
2030	<ul style="list-style-type: none"> ▶ All sub-programs under progress

Proposed subprograms and projects

1.1.1 Sub-program for Tourism governance structures at national and regional levels	
Description and projects	Time frame
<p>The following program aims to foster a well planned and represented tourism sector by securing political support, strengthening decision making level representation and encouraging regional integration in order attain sustainable tourism growth.</p> <ul style="list-style-type: none"> ▶ Project 1: Create the Tourism Ministerial Council. The council would act as a high-level decision-making tool integrating ministers from relevant portfolios of the Government of Belize whose ministerial policies and initiatives have an impact on Belize's tourism. The following factors to create the tourism ministerial council should be covered at the legal scheme: <ul style="list-style-type: none"> • Mission and objectives of the council. The aim of creating the council is to commit and to align Ministers from relevant portfolios composing the Government towards working and allocating economic resources for Belize tourism development priority projects. Legislation should be designed accordingly. • Chair of the council. For maximum effectiveness of the council, the Prime Minister of Belize should become the chairperson of the council. • Members of the council. All relevant Ministers heading portfolios whose decisions affect the tourism sector should be part of the council. The following Ministers, due to its strong influence on the tourism sector, are proposed to be members of the Tourism Ministerial Council: <ul style="list-style-type: none"> • <u>Minister of Tourism, Civil Aviation and Culture (Chair)</u> 	<p>Project 1: Starting date: 2012 Duration of formation: 1 year</p> <p>Project 2: Starting date: 2012 Implementation: 1 year</p> <p>Project 3: Starting date: 2013</p>

1.1.1 Sub-program for Tourism governance structures at national and regional levels

- Minister of Finance
- Minister of Natural Resources and the Environment
- Minister of Transport, Communications and National Emergency Management
- Minister of Health
- Minister of Education
- Minister of Works
- Minister of Economic Development, Commerce, Industry and Consumer Protection
- Minister of Labor, Local Government and Rural Development
- Ministry of Defense and Immigration
- Ministry of Foreign Affairs and Foreign Trade
- Ministry of Police and Public Safety

Implementation:
continuous

To make the council effective, the Ministers should be conscious of the importance they attend the council meetings personally. The fact this council is named Tourism Ministerial Council requires the appointed Ministers to attend themselves. Anybody attending on behalf of a Minister, not being the Minister himself, would not have enough power to decide and to commit resources at the meetings.

- **Roles and responsibilities.** The responsibilities the Tourism Ministerial Council would undertake include:
 - Defining and ensuring an integrated tourism planning composed of multi-ministerial policies and programs
 - Allocating economic resources and prioritizing investments from several ministerial sources towards the multi-ministerial tourism planning
 - Committing private sector stakeholders and aligning management from each minister's portfolio towards the achievement of the programs set
 - Ensuring implementation and compliance of the agreements set at the council through programs and corresponding investments.
- The set of programs and policies to be approved by the Tourism Ministerial Council in a broad portfolio perspective should be those proposed by the Ministry of Tourism and any other enriching contribution suggested by Ministers.
- **Decision-making mechanisms.** A voting system should be established for decision-making; the following is conceived as a proposal:
 - Voting conditions
 - Voting shall be equal
 - Votes shall be represented by all relevant ministries
 - Voting participation share
 - 1 vote per each ministry
 - The Minister of Tourism would have the power to break the deadlock
 - Frequency of meetings and voting:
 - The Tourism Ministerial Council would meet at least twice a year: a first meeting to agree on an integrated multi-ministerial tourism program and to allocate resources; a second follow up and evaluation meeting. Additional extraordinary meetings should be required according to circumstances.
 - Voting should be required when approving tourism focused policies and programs to be initiated on an integrated manner by each Ministry.

1.1.1 Sub-program for Tourism governance structures at national and regional levels

► **Project 2: Strengthen the National Board of BTB.** Strengthening Belize's tourism governance by involving further public and private sectors with common objectives and shared decision making would lead to obtain enormous benefits through an increased grade of cooperation. The current governance structure represented by the board of BTB should be strengthened based on a full-integrative approach considering the following:

- Integrate actively into the Board associations and interest groups from the Belizean tourism sector that should be represented by their president or their highest representative in duty.
- Maximum of 15 members (some permanent and some non-permanent members) from the public, private and civil sectors that will constitute the Board according to professional and independent criteria, but also providing transparency in the decision making of the enrolling members.
- At the Board, there would be permanent and non-permanent members depending on the discussed topic and the grade their attendance is required.
 - Permanent members: directly involved stakeholders into tourism such as BTB, BTIA, BHA and the Trust Fund (NSTTF) when created.
 - Non-permanent members: non-directly involved stakeholders into tourism whose contribution is extremely important but only required occasionally (Ministry of Works, Ministry of NR, BELTRAIDE, etc.). The involvement of those non-permanent members at the Board is crucial due to the strong (positive or negative) effects their activity has into tourism.
- For an effective National Board, member appointments should be done at least at the CEO or Director level.
- Ensure decision making is made on equitable criteria by all members of the Board from the public, private and civil sectors.
- The following elements should be determined within this project:
 - Members of the National Board
 - Participation and decision making mechanisms
 - Funding sources

► **Project 3: Representation through Destination Coordinators.** In order to foster higher regional representation, a lead member from the regional tourism sector should be appointed on a voluntary basis as destination coordinator reporting to the National Board of BTB. The main function of the coordinator will be to gather proposals for tourism development and for decision making at a destination basis. These representatives should report to the board in order to provide inputs from the regional stakeholders.

Destination coordinators should be preferably set up at each destination in order to represent the different tourism regions: Northern Belize, Central Belize, Western Belize, Southern Belize and Northern Islands & Belize Reef.

The destination coordinator would be responsible to liaison with the local government and tourism sector stakeholders in order to get feedback and support product based destination planning.

Ongoing relationships should be built with at least the following regional chapters of:

National Sustainable Tourism Master Plan for Belize 2030 • National Tourism Governance Macro Program

1.1.1 Sub-program for Tourism governance structures at national and regional levels

Public sector	Private sector	Civil sector
<ul style="list-style-type: none"> Belize Mayors Association Local authorities 	<ul style="list-style-type: none"> Regional representatives of BTIA Regional coordinators of BTB 	<ul style="list-style-type: none"> Regional/ local NGO's and other institutions
<p>The following elements should be determined within this project:</p> <ul style="list-style-type: none"> Participation and decision making mechanisms Funding sources and sustainable revenue collection 		
Lead stakeholders		Strategic Partners
MOTCAC BTB		NSTTF BTIA, BHA, BTOA, BTGA, BCIA Other governmental organizations (Ministry of Works, Ministry of NR and the Environment, etc.) Beltraide; Mayors Association, Municipalities NGOs
Destinations for implementation		
<p>The National Board should integrate the most relevant stakeholders at a country level from the public, private and civil sectors. For the Destination Coordinators, the entire country should be covered and in at least the following regions: Northern Belize, Central Belize, Western Belize, Southern Belize and Northern Islands & Belize Reef.</p>		
Estimated cost (USD)	Potential financing sources	
USD 3,150,000	Governmental funding Business tax Tourist/ Cruise tax Mandatory fees (licenses) Voluntary partnerships International funding from WB, IADB, etc.	

1.1.2 Sub program for Strengthening the Management Structure for Tourism Development

Description and projects	Time frame
<p>The aim of this program is to create a functional structure at the Belize Tourism Board that would support the Product Development approach and ensure sustainable development of the tourism sector following the strategies and objectives set forth in the NSTMP.</p> <p>► Project 1: Strengthen institutional tourism management. Belize Tourism Board (BTB) is working as the main destination marketing and quality enhancement organization in Belize. At the moment no entity is in charge of product development, which is a core activity in tourism completing the activities on marketing and quality BTB is undertaking. Product development is understood to be as designing and developing a portfolio of actions aiming to have well-developed quality products to be sold to source targeted markets. BTB, by having such double quality/ marketing vision, and since actions are already taken towards developing certain product (cruise tourism), should widen its scope by creating a specific group in charge</p>	<p>Project 1: Starting date: 2012 Implementation: continuous</p>

1.1.2 Sub program for Strengthening the Management Structure for Tourism Development

of designing actions with the aim of developing Belize's portfolio of tourism products. In order to accomplish this task and sustain its function thru time, a consistent and reliable revenue source is a key priority. Therefore, the following roles should be established within BTB:

- **Fund raising officer:** Aims to create a sustainable organization that will continue to have resources needed to fulfill its needs. The role is to ensure that the fundraising capacity of the organization will keep pace with programming needs and securing funds for short-term or long-term projects. Key functions are to develop:
 - A sustainable fund raising strategy: a plan that sets out funding need alongside the identified actions, timescales and possible resources needed to meet this need.
 - Self-funding innovative solutions: develop innovative business concepts and/or create revenue streams that are highly independent from other agencies.
 - Transparent revenue collection: ensure revenue collection mechanisms are efficient and resources are properly allocated to its defined program.

Two main operational areas should be within the organizational scope of BTB:

- **Core Functional areas: Sustainability & Quality Enhancement** (standards & licensing, inspections & security, capacity building and information systems) and **Marketing and Industry Relations** (branding, strategic marketing, operational marketing & events, and industry relations).
- **Product based destination planning area:** assigning a management team lead by a Destination Product Development Director the responsibility to develop each of the core tourism products Belize would be selling to the source markets (nature tourism, culture tourism, cruise tourism, sun & beach tourism, nautical tourism, and leisure & entertainment tourism).

Product managers would be aiming to consolidate products and will therefore be in charge of the following tasks:

- Identifying and creating new products in a circuit/ route/ man-made format
- Defining product requirements
- Building product roadmaps and design feasible projects
- Product Life Cycle considerations
- Conducting customer feedback and gathering market requirements
- Monitoring performance of the different products
- Coordinating with NSTTF, BELTRAIDE and other relevant stakeholders during the implementation phase for investment and development of product at destinations.

In accordance with the previous, there should be a product manager responsible of each of the products. These positions should be opened gradually according to the priority scale and available budget.

- Culture Tourism
- Nature Tourism
- Sun & Beach Tourism
- Nautical Tourism
- Cruise Tourism
- L&E Tourism

Those management units within the BTB organizational chart would be supported on field by the destination coordinators representing both BTB and NSTTF.

1.1.2 Sub program for Strengthening the Management Structure for Tourism Development

Strong coordination is also required particularly with the newly established Destination Coordinator for inputs and support, the created Belize National Sustainable Tourism Trust Fund (NSTTF) for project execution in terms of product development, as well as BELTRAIDE for tourism business development and investment promotion.

Some additional functions BTB should be covering in the above mentioned units are:

- Create and structure tourism products defined in the product development plan
- Consider sustainability aspects early on in the product development design process (such as minimizing environmental footprint while supporting cultural heritage, and local communities participation)
- Create new tourism products and packages and facilitate negotiations with all tourism stakeholders involved in the product
- Promote tourism products, facilities, services and activities; follow up and development of tourism product clubs.
- Facilitate the contact with travel agents and tour operators at national and international level
- Coordinate the identification and delivery of commercial visitor services, such as information, booking, advice, etc.
- Coordinate and promote synergies among private sector providers, such as accommodation and food and beverage facilities, transport, shopping, activities, natural and cultural resources, etc.
- Identify and coordinate together with NSTTF the establishment of partnership and alliances between public and private stakeholders which will help to develop products
- Coordinate the collection of the information and research needs of the tourism sector with the tourism clusters, about the characteristics of the supply and the demand needs and expectations, tendencies, new concepts, business opportunities, etc.
- Organize conference and meetings related to different tourism development issues in the area

Lead stakeholders	Strategic Partners
BTB	NSTTF Private sector in general, especially BTIA Beltraide NGOs
Destinations for implementation	
At a national level, but supported by destination coordinator which are based at a regional level.	
Estimated cost (USD)	Potential financing sources
USD 4.030.000	Business tax Tourist/ Cruise tax Mandatory fees (licenses) Voluntary partnerships International funding from WB, IADB, etc.

1.1.3 Sub-program for National Sustainable Tourism Development Trust Fund

Description and projects	Time frame
<p>Create a National Sustainable Tourism Development Trust Fund to promote investment, growth and development in the tourism sector, encouraging better management of tourism resources, while supporting The National Sustainable Tourism Master Planning. The program will generate a win-win approach, where the public sector would see positive economic and social impacts as a result of the implementation of the projects, and the private sector would obtain economic profitability through their investments. The NSTF can be understood as the entity that carries out the product development 'hard' components (i.e. infrastructure, financing, land use framework), where as the BTB Destination Product Development Department would be responsible of the 'soft' components (ie strategies, content and operational activities).</p> <p>► Project 1: Tourism Development Trust Fund Pilot phase. Prior to the implementation of the Trust fund Act an important lobby effort needs to take place in order to create awareness and get acceptance from public and private sector. For this effort the following steps should be carried out:</p> <ul style="list-style-type: none"> • <u>Establish a lead committee:</u> This commission would comprise of key leaders and influencers of the tourism industry public and private sector representation. The committee will be responsible for: <ul style="list-style-type: none"> • Studying feasibility and impact of funding source options • Lobbying for Trust Fund Act to be made policy • Searching for seed capital investment, such as: <ul style="list-style-type: none"> ○ Government land assets as equity ○ Multilateral support ○ Government support with HR and office equipment • Analysis of potential funding sources, (feasibility, impact and potential income generation), such as: <ul style="list-style-type: none"> ○ Before adding a Trust Fund tax in the tourism sector a taxation study of the tourism industry needs to be conducted in order to identify the how much the sector is already taxed, how it is used and if there are any additional opportunities to tap into. • Setting up a pilot phase to test the function and structure of the Trust fund. <ul style="list-style-type: none"> ○ Find alternative solutions to tourism development funding before pilot phase and ultimately establishment of the Trust Fund. A potentially feasible solution is that each Product development director manages its master planning and funding sources and MOTCAC/BTB coordinates with Land Use for Tourism zoning. ○ However, the first priority is to identify the three possible models, conduct a feasibility study of each model and pilot most appropriate structure. All the models need to be inclusive of the roles assigned (master planning and investment). <p>► Project 2: Establishment of Tourism Development Trust Act. As a result of the trust fund act there would be defined a model of structure and a plan of implementation and operation; transitions from feasibility study with piloting and feasibility testing and lobbying (3 years) until the process-options are fully aligned and streamlined.</p> <ul style="list-style-type: none"> • The Trust Fund Act should clearly state the following items: <ol style="list-style-type: none"> i. Objectives of the Trust Fund ii. Funding: <ol style="list-style-type: none"> a. Sources b. Sustainable revenue collection schemes c. Investment policy 	<p>Project 1: Starting date: 2012 Implementation: 2 year</p> <p>Project 2: Starting date: 2014 Duration: 1 years</p> <p>Project 3: Starting date: 2015 Implementation: 3 years of seed capital</p>

1.1.3 Sub-program for National Sustainable Tourism Development Trust Fund

- d. Withdrawal policy
- e. Usage policy
- iii. Establishment of the Entity
 - a. Functions
 - b. Board of Trustees
 - c. Resources
 - d. Accounts, audits and reports
- iv. Tourism development criteria
 - a. Tourism zoning criteria
 - b. Fundable tourism projects

- ▶ **Project 3: Establishment of the National Sustainable Tourism Trust (NSTTF).** The creation of a fund for master planning and management of tourism zones as well as identifying and selecting projects for investment with strong national impact. A statutory body is recommended because it creates an independent legal personality that allows for managing its own funds and reduces the risk of its own funds being allocated to other objective that are not under the mandate of Trust Fund.

- Board of Trustees: In the case that a statutory body is created, there should be no less than 7 and no more than 13 members with a balance between government appointed and nongovernment appointed. At least the following representatives should be considered to be on the board:
 - i. Government appointed representative
 - MOTCAC
 - BTB
 - MOF
 - MOED
 - Beltraide
 - ii. Non-government appointed representative
 - BTIA
 - BCCI
 - Certified Accountant
 - Certified Lawyer
 - Certified Civil Engineer
- The NSTTF would function with two operational units:

UNIT 1. Tourism zoning master planning and management.

- ▶ Tourism zones master planning: taking into account current and potential tourism opportunities classifies tourism zones and defines its land use framework. Conducts specific key destination master planning and preliminary identification of development sites. The Master planners should address sustainability issues such as:
 - Create a code enforcement mechanism to be sure that standards set by the Land use Plan are maintained over the long term
 - Address specialized issues that affect sustainability and the quality of the tourism environment such as visual quality and clustering of development.
 - Address issues of development induced displacement and monitor the integrity and authenticity of the place, village, and town.
 - Create a limited, but expanding number of targeted development projects that are pre-approved with the kind of land use assurances characterized above. These permissions need to consider the sites and the surrounding areas. For example, it is of most benefit to an eco-lodge developer (and consequently creates the most value to Belize), for the investor to know that the

1.1.3 Sub-program for National Sustainable Tourism Development Trust Fund

surrounding land area will be permanently conserved to keep their primary amenity pristine.

- ▶ Management and execution of projects: given the realized master plans and approved funded projects, regional managers will oversee management of the plan and execution of the projects. Representation for each of the following regions would be needed by 2030: Northern Belize, Central Belize, Western Belize, Southern Belize, Northern Islands, and Reef.

UNIT 2. Partnerships and financing

- ▶ Partnership schemes: given the identification and prioritization of potential tourism projects, partnership managers would define most suitable implementation and investment schemes and search for potential strategic partners and financiers. Managers would have a project based focus in developing partnership schemes and seeking out investors and partners that share Belize's commitment to sustainable tourism development with:
 - Private sector
 - Public sector & multilaterals
 - Civil society & non-for profit.
- ▶ Funding: All funding sources possibilities need to be analyzed and tested. A taxation study needs to be conducted before deciding on that direction. There are multiple options for funding sources already valid in regional countries, in Belize there are numerous possible combinations of funding sources to be further analyzed and would be expected to change over time.
- ▶ Investment: Investment in Tourism Development in the form of grants, matching grants and/or low interest loans. The main investment activity should focus on:
 - Public productive infrastructure for tourism zones: Allocation of fund for public infrastructure that will contribute to private sector output and productivity growth (e.g. roads, energy supply, water supply, new or improved tourism attractions)
 - Common benefit tourism infrastructure and services projects: Allocation of funds for projects that will enhance the overall tourism experience and its services (e.g. capacity building, improved security, hospital services, welcome centers, product development)
 - R&D: Allocation of funds for high risk projects of research, innovation and technology nature with high potential for tourism sector growth.
 - Endowment fund: Up to 5% of income generated would be held in reserve in an endowment fund for emergency mitigation in the event of a crisis that greatly affects the tourism industry.
- ▶ In order to assure effectiveness of the NSTTF mandate, efficient and constant coordination between the following agencies need to be carried out:
 - Land Use Authority²: Designation of tourism zones and approval of development sites.
 - Belize Tourism Board: Market information for tourism zoning criteria and master planning tourism sites. Investment priority of tourism projects.
 - Beltraide: Identification of business opportunities for foreign investors and attraction of foreign investment and international hotel brands.

² Land Use Authority, specific government ministry, department or statutory body that will oversee the implementation of the **National Land Use Policy** and host the **National Integrated Planning Framework** for Land Resource Development and the **Land Suitability Mapping System for Belize**; currently foreseen to be ready by mid-2011.

National Sustainable Tourism Master Plan for Belize 2030 • National Tourism Governance Macro Program

1.1.3 Sub-program for National Sustainable Tourism Development Trust Fund

<ul style="list-style-type: none"> Development Finance Institution & Other private Banks: Identification and delivery of appropriate financial tools needed for private sector investment in tourism business development. 	
Lead Responsible	Strategic Partners
NSTTF as a statutory body under the MOTCAC	BTB Beltraide Land use authority DFC & Private Banks
Destinations for implementation	
Nationwide. Phasing based on strategic priority of tourism designated zones and product development.	
Estimated cost (USD)	Potential financing sources
USD 7, 700,000	Selling of property development rights, land lease/concessions Repayment of loans and interest of loans Multilateral grants/loans Contributions, donations, grants and aid agencies of all kinds Dividends or the sale of equity holdings and financial instruments <u>Technical assistance</u> : evaluation and qualification of investment projects, assistance to the private and public sector <u>Parafiscal tax</u> : Tourism development fee for incoming tourist; Tourism development tax for tourism operators

1.1.4 Sub-program for Strengthening of Investment attraction and tourism SME development

Description and projects	Time frame
<p>Strives to create a sound and competitive investment climate, enhance foreign investment promotional and facilitation activities and encourage professionalization of tourism SME local community while supporting the strategies set forth by the National Sustainable Tourism Master Plan. Efforts should be channeled through Belize's already constituted Investment Promotion Agency (IPA) - <i>Beltraide</i>.</p> <p>► Project 1: Enhance investment climate environment of Belize. Examines adverse perceptions of Belize (see annex II Developers' survey and funding institution benchmarks results) as an investment destination and reviews practical problems the international investment community faces in Belize and seeks for proactive solutions to mitigate them and ultimately create an attractive investment destination.</p> <ul style="list-style-type: none"> Adopt a structured approach to gathering information from investors and set up a system to addressing the problems face. Conjointly, conduct thorough periodic reviews of regulatory regimes that could be simplified and/or enhanced. As a response advocate within government for necessary policy changes, urge removal of obstacles to investments, and push for transparent procedures. Common policy practices to scrutinize for a streamlined investment climate: <ul style="list-style-type: none"> Cost and time required for approvals of various business licenses and permits Approvals to purchase/lease land/change the zoning restrictions on use of land EIA agreements on mitigation and monitoring environmental impacts 	<p>Project 1: Starting date: 2012 and 2020 for revision</p> <p>Implementation: 1 year</p> <p>Project 2: Starting date: 2012</p> <p>Implementation: Continuous</p> <p>Project 3: Starting date: 2013</p>

1.1.4 Sub-program for Strengthening of Investment attraction and tourism SME development

- Tax concessions and customs duty waivers
 - Work permits for foreign staff
 - Timely access to public utilities at affordable rates
 - Foreign exchange regulations or restrictions on capital and dividend repatriations
 - Various facets of labor law and pension provisions
 - Contract enforcement and dispute resolution system
 - Expropriation laws and review processes
 - Non-discriminatory treatment for nationals and international investors
 - Given the pursuit of policy measures as a first action to create a sound investment environment complement the offer with an appropriate cost-effective incentives program for domestic and foreign investors.
 - Evaluate current national investment incentives programs for its relevance, appropriateness and economic benefit against their budgetary and other costs, including the long-term impact on resource allocation.
 - Devise appropriate tourism sector specific incentives schemes to meet investor needs by rectifying market imperfections that policy reform cannot already address.
 - Incentives to be derived should promote the strategies set forth by the NSTMP such as: Incentives to promote resort development, hotel upgrading, reconversion of condos to resorts, construction - furniture - decoration (amenities-consumables) with Belizean products, PPT mechanisms implementation, 37 environmental sustainability implementation criteria; local ownerships.
 - Conduct a cost-benefit analysis of all proposed incentives.
 - Improve service delivery of the incentive program by reducing the application process and increasing transparency of the evaluation process. Develop an IT based management system that automates the application, administration, and monitoring process of the incentives program.
 - Build an image of the country as a tourism investment opportunity by developing relevant promotional/marketing collateral material in hard and soft format. The promotional material should reflect a clear and consistent brand and content should be consistent with other national/sub national material. An approach to the collateral material could be a dossier of “business opportunity profiles” (not intended to be clarify ROI and risks but rather to inspire investors to look into the opportunities more closely themselves).
- **Project 2: Attract foreign direct Investment and international tourism companies’ brands.** Develop an approach for attracting direct foreign investment and international tourism brands that is knowledge-driven, targeted and focused on achieving specific results. The strategic approach involves the following three steps:
- Identification of sites & technical dossiers: Identify sites suitable for strategic tourism projects that offer a potentially attractive opportunity to the international investment community. Engage with NSTTF and BTB to identify key priority sites.
 - Conduct preliminary feasibility analysis of the different pre-identified sites, prepare descriptive files for each potential project and prioritize the most suitable projects for further investment promotion. Engage with private land owners when appropriate and devise appropriate partnership schemes.
 - For the most suitable projects prepare technical dossiers: Master plans and Business plans.
 - Identify most suitable investors/operators and prepare a long list of those to

Implementation:
Continuous

Project 4:
Starting date: 2014

Implementation:
continuous

1.1.4 Sub-program for Strengthening of Investment attraction and tourism SME development

- target.
 - Prepare appropriate Offering Memorandum and teasers per project/investor type.
 - International campaign and negotiations: Launch international presentation campaign and make preliminary contacts with potential investors/operators. Organize tender process to formally receive bids. Conduct due diligence of proposals and evaluation of offerings. Final negotiations and closure of specific agreements on investment, development and operations of contracts.
 - Developing Trust & Relationships: Maintain and foster trust and relationships with the international investment and hotel operator community. Create a database or CRM system as a tool to improve services provided to customers and to draw information for personalized marketing and sales communications.
- **Project 3: Enhance service delivery to investors and developers.** Centralize administrative procedures for foreign and national investors and developers for the purpose of streamlining services provided to investors/developers at the IPA. Therefore considerable efforts should be made in order to create a **one-stop-shop** that does not become simply 'one more stop'. Additionally, a balance must be established between the removal of administrative impediments and the government right to regulate.
- Services provided: The one-stop-shop should provide easy access to information on the necessary steps to start or expand a business and speeds up the granting of necessary permits and licenses.
 - Additionally, it would be helping guide investors to understand sustainable tourism criteria and perform environmental impact assessments, identify renewable energy options, facilitate community integration and participation, source locally, etc
 - Liaison among government departments: Effective cooperation should be established among the different governmental departments that intercede in the various layers of registrations, permits and licensing. They should identify information sharing needs and tools needed for effective cooperation as well as lead times and requirements.
 - Approaches to cooperation could be: leading the IPA through a board composed of key government agencies; appointing IPA liaisons to key ministries; transferring legal authority to the IPA to issue relevant permits.
 - Key governmental departments/ministries: DOE; Belize Company and corporate affairs registry; GST; Social Security Board, company registry, city council, central building authority, lands department, valuation department.
- **Project 4: Encourage professionalization of the SME tourism community.** The project would consist of creating a space for business skills transfer and offering regular training opportunities on specific tourism business development topics. Through a chain of Service Centers facilities address the need to create SMEs which respond to gaps that exist in the tourism value chain, generate employment opportunities and employ high standards of professional service delivery.
- Create a central "Service Center" or "Entrepreneurship Hub" as one-single physical facility and expand to regional satellite hubs in key priority areas. Continuous coordination for delivery and content of programs always with BTB and when appropriate synergies can be devised with Belize Chamber of Commerce.

1.1.4 Sub-program for Strengthening of Investment attraction and tourism SME development

- Service delivery would be in the form of certificate courses, workshops, seminars, round tables and talks specifically designed for tourism business development and market linkages. Key topics/objectives:
- Training and know how transfer: Further enhance business skills of current and potential professionals and managers of tourism companies and service providers.
- Business Incubator: Provide different secretarial services and equipment for business incubation (such as meeting rooms and office facilities). Provide specialized support for entrepreneur's start-up projects (such as business plan writing, sources of funding).
- Technical and business development assistance: Create an awareness programs that provide an overview of the business opportunities in the tourism industry. Actions geared towards eliminating the livelihood gaps through market linkages with the tourism industry.

Lead Responsible	Strategic Partners
Beltraide	BTB NSTTF BTIA – BHA – BTOA – BTGA - BCIA DFC & Private Banks DOE Belize Company and corporate affairs registry GST Social Security Board Universities & other training institutions Belize Chamber of Commerce
Destinations for implementation	
One centralized office servicing nationwide. Regional Entrepreneurship hubs based on strategic priority of tourism designated zones and product development.	
Estimated cost (USD)	Potential financing sources
USD 17.550.000	Self-generated funds through fee applications Multilateral grants/loans Government – MOED

Program for Tourism Policy

Gaps identified - Diagnostic

- ▶ There are only few legislation acts that maintain the regulations and standards for Belize tourism. These are Belize Tourism Board Act (2000), Belize Timeshare Act (2007), Belize Hotels and Tourist Accommodation Act (2000, revised), Belize Hotels and Tourist Accommodation Act Subsidiary Laws (2003, revised).
- ▶ The legislation for tourism in Belize sets out a comprehensive system for administering tourism and for setting the necessary regulations and standards to maintain the quality of Belize's tourism industry.
- ▶ The Government of Belize offers specialized and effective incentives that attract investments to all sectors of the Belizean Economy. However, there is only one fiscal incentives scheme that is applicable to the tourism service sector. A tourism specific scheme is being prepared by the Beltraide with the inputs of Ministry of Tourism; date of completion is still to be determined.

Due to its positive impact on the economy, tourism must be an activity supported by the government of the country. To achieve this, a review of current tourism policies and legislation must be carried out.

Vision 2030

Policies and policy instruments that govern the tourism industry in Belize set clear and consistent goals for the future of Belize tourism. The principal of their design is to improve the quality of life of the population, finding the balance between catering to the needs of overnight tourists and cruise passengers, the fostering of a positive enabling environment for the industry, a strong local participation and that planning and management are based on partnership and collaboration agreements. Ultimately, policies and policy instruments lead towards a sustainable tourism progress.

Description of the program

Some of the tourism policy tools have already been addressed in previous sections such as organizational instruments, general tourism planning, tourism development and communication programs. Hence, specific issues will be particularly addressed which are crucial tools in the tourism policy formulation of a country:

- ▶ **Lobbying and partnering tools** as a crucial instrument to place tourism policy as a main national policy of Belize.
- ▶ **Regulatory instruments** for creating a legal framework addressed to strengthen capacity and scope of action of Belizean tourism stakeholders.
- ▶ **Financial instruments** as different economic devices aimed at providing financial support to public and/ or private initiative in the tourism industry in general and hence strengthening stakeholder capacity from an economic point of view.
- ▶ **Public-Private Partnership models** in order to develop a portfolio of projects and initiatives where public-private partnerships are crucial for success in Belize's tourism development.

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Lead stakeholder

The MTCAC is responsible for revising and amending current policies and deriving needed policies for the support of tourism product development. Other ministries such as Ministry of Transportation, Ministry of Economic development among others, will be responsible for revision of their policies in the terms were it currently hinders sustainable tourism development. Strategic stakeholders would be BTB and private sector associations among others that would lobby for needed policy and legislation.

Objectives

- ▶ To reinforce the development of tourism activity and increase foreign currency revenue originating in tourism activity
- ▶ To foster and coordinate the participation of the private sector carrying out joint actions
- ▶ To plan the development of the destinations and regulate the subsectors
- ▶ To support the modernization and innovation of the tourist supply (companies, products, facilities, etc.)

Milestones

Review Years	Milestones
2015	<ul style="list-style-type: none"> ▶ All schemes are settled to support: lobby, funding mechanisms, legal framework and Public-private partnerships. ▶ At least 2 legal frameworks for tourism products of Belize have been done
2020	<ul style="list-style-type: none"> ▶ All tourism products have their own legal framework ▶ Land use and tourism development guidelines, standards and categories are enforced by law. ▶ All program under progress
2025	<ul style="list-style-type: none"> ▶ All program under progress
2030	<ul style="list-style-type: none"> ▶ All program under progress

Proposed subprograms and projects

1.1.5 Sub program for Strengthening of the Tourism Policy	
Description and projects	Time frame
<p>The aim of this subprogram is to address the enabling environment and regulating and legal framework that is needed to support the strategic implementation programs of the NSTMP. Topics to be addressed are lobbying and partnering, needed policy review, financial mechanisms, and PPP legal framework.</p> <ul style="list-style-type: none"> ▶ Project 1: Political and public actors lobbying and partnering. Lobbying and partnering with other governmental and public stakeholders is crucial to place tourism policy as a main national policy of Belize. The Ministry of Tourism should make a strong deal on creating networks, establishing connections and strategic partnerships with the Prime Minister's office, relevant governmental ministries, and other public sector institutions in order to boost tourism as a first priority of Belize but also to maximize the Ministry's contribution to the development 	<p>Project 1: Starting date: 2012 Implementation: continuous</p>

1.1.5 Sub program for Strengthening of the Tourism Policy

of the sector.

The issues where the Ministry's should have further impact on are:

- Infrastructure planning, investments, sustainability, environmental policies, product development, etc.
- Getting from the government higher public investment for tourism implementation projects by also prioritizing implementation in terms of time frame.

To establish and reinforce a strategic relationship with all necessary public institutions in Belize. Special consideration should be given to those ministries whose activity influences to a great extent the tourism sector, such as the Ministry of Works and the Ministry of Natural Resources and the Environment. This is to be done in order to streamline the organization and funding needs in view of the recommendations of the Master Plan.

Other public institutions that should strongly considered for lobbying are: National Institute of Culture and History, Coastal Zone Management Authority, Forest Department, Ministry of Agriculture and Fisheries, Belize Trade and Investment Development Service, Belize Mayors Association, etc.

- ▶ **Project 2: Legal framework development.** This project focuses on creating a legal framework addressed to strengthen capacity and scope of action of tourism stakeholders from the public and the private sectors at the national, destination, and local level.

The following considerations should be approached when designing the legal framework:

- Legal structure providing BTB with the required competences to manage the country as 'product' managers'.
- Legal specifications to strengthen municipalities' role in tourism management by providing them competences to extend their functions at a local basis.
- Legal framework to create a business friendly environment guaranteeing land property and investments.

Besides, there should be a specific legal scheme in the following issues:

- **Legal scheme to create the Tourism Ministerial Council** as a high-level decision-making tool integrating ministers from relevant portfolios of the Government of Belize whose ministerial policies and initiatives have an impact on Belize's tourism. The following factors to create the tourism ministerial council should be covered at the legal scheme:
 - Mission and objectives
 - Members of the council
 - Roles and responsibilities
 - Decision-making mechanisms
- **Legal scheme regulating tourism products and its specific activities** (nature, culture, sun & beach, nautical, cruise and leisure & entertainment). Regulation on tourism activities should be covering the following areas:
 - Operators licensing
 - Insurance and civil responsibility policies
 - Written documentation and commercial contract: description of the activity, planning, program, route, etc. and finally to sign a commercial agreement on a contract.
 - Operations: professional staff; technical material; equipment and facilities; etc.
 - Guiding: a multiple layer tour guide license scheme including general and naturalist guiding licenses; multiple specialty licenses and a scale of professional levels according to experience. Define education and experience required to achieve each type of license.

Project 2:

Starting date: 2012
Implementation: 8 years until 2020

Project 3:

Starting date: 2013
Implementation: 1 year

Project 4:

Starting date: 2013
Implementation: 13 years until 2025

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- Safety policies and accident prevention initiatives
- Customer satisfaction policies and claim processing
- Risks management: Risks acknowledge declaration; emergency response protocols, etc.
- Requirements to undertake the activity: minimum age, nr. of tourists per guide, physical conditions, etc.
- **Legal scheme regulating operations and activities undertaken at the whole tourism value chain** and particularly businesses dealing with services in transportation, accommodation, tour operation, food & beverage, and leisure. Legislation on these issues has to include basic operational standards for the tourism industry. These elements should be the requirements for tourism operations and licensing approval. The scope to be covered within the legislation of activities is:
 - On statutes: Fulfillment of all statutory obligations were applicable
 - On commercialization: Minimum requirements of information delivery to customers and contractual obligations
 - On services:
 - Requirements of an operations plan
 - Requirements for safety and security procedures
 - Requirements for disaster preparedness and emergency plan
 - Requirements for tour guides
 - Requirements for food security
 - Requirements for services
 - Limits and obligations of activities
 - Infrastructure, equipment and facilities
 - Requirements for material
 - Requirements for infrastructure maintenance plans
 - Requirements for minimum equipment standards and maintenance plans
 - Quality labeling requirements: Specifically for hotel star rating.
- **Legal scheme to regulate the tourism activity at a destination level**, and particularly in environmentally vulnerable sites (coastline, national parks, barrier reef, islands & atolls, etc.). The following elements should be considered at the legal scheme:
 - Areas to be applicable (coast, national parks, reef, etc.)
 - Sites where tourism could be developed
 - Conservation and environmental protection policies
 - Cultural and socio-economic safeguard policies
 - Activities on sites to be allowed, especially those related to tourism
 - Restrictions in terms of constructions, infrastructures, activities, etc.
- **Legal scheme regulating land use categories and typologies**, with building guidelines and permissions by destination, has to be developed and transformed to law, in order to keep destination's concepts and overall cohesion of Belize. Land use regulation should be ensuring:
 - Clear development standards that are consistently applied
 - Clear and transparent entitlement processes that provide predictability to the permitting and development process

To do that, basic typologies for land use regulations such as; zoning for cities, towns or

1.1.5 Sub program for Strengthening of the Tourism Policy

villages; land use plans for larger areas such as districts; and special purpose plans for environmentally sensitive areas.

Therefore, with respect to land use planning, strategies need to include:

- Define standards for tourism development considering environmental, social, cultural and economic well-being of Belize.
- Establish a coordinated land use planning process to gain entitlements for tourism development.
- Create a long-term approach to land use planning that will conserve the quality of the fundamental resources as well as encourage high quality tourism in Belize.
- Create a long-term strategy on how to deal with the regulation of Condos, timeshare, fractional vs. resort development

The legal scheme should be undertaken at the following categories:

- Specific land uses at existing towns,
- Existing Town/Village – for example, Belize City, San Pedro, San Ignacio
- New Town/Village Resort – for example, The Placencia
- Resort – such as the San Ignacio hotel
- Conservation – Bacalar Chico
- Special Purpose Area – Ambergris Caye and Placencia Peninsula

The elements the land use legal scheme should be covering at each of the above mentioned categories are:

- Permitted Uses. Land uses permitted.
- Prohibited Uses. Land uses that are not allowed.
- Typical Maximum Building Height. In stories, but the main criteria is to be similar to surrounding, existing land uses or to work within the context of the existing environment.
- Typical Maximum Building Area, Coverage or FAR. The amount of building area allowed as a percentage of site area.
- Typical Build-To Line. In places such as a High Street, it is important for buildings to be close to the street.
- Typical Minimum Set Backs. In less urban environments, the distance between buildings is described.
- Typical Open Space Requirement. Large scale land uses have requirements for a percentage of the land to be in open space.
- Typical Minimum Frontage. So that the frequency of building along a street can be maintained, or access to the land use provided.
- Typical Density per Hectare. The number of units, such as residential, per hectare.
- **Other issues to be considered at the legal scheme:**
 - To revise arrival migration policies by port of entry, particularly land and sea
 - To revise visa requirements based on opportunity markets for tourism development
 - To revise legislation to facilitate transportation and cross-border movement into Belize
 - To facilitate regional movements thru intra regional transit agreements to foster cross-border tourism circuits

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- To adapt migration legislation to the retirement program as a way to facilitate its development in the country
 - To revise policy for judging criminal cases against tourists to occur without the need for the tourist to return to Belize from their country of residence

► **Project 3: Financial scheme development.** It is required to create a financial framework addressed to strengthen institutional capacity of public and private tourism stakeholders from an economic perspective with the aim of facilitating the development of tourism projects.

Therefore, a sustainable funding source for the implementation of the master plan during at least the next 5 years should be established. The NSTMP will not be enforced unless a critical mass of funding is provided by the public and the private sector as seed money for the major investments that need to be done in terms of:

- **Road infrastructure** to improve accessibility to destinations: create some new roads and improve maintenance of some existing ones, create or improve general directions and specific tourism sign posting.
- **Setting up the enhanced BTB and the NSTTF** which means investments in facilities and equipment and contribution to staff expenses to support the initial years of operations.
- **Support investments** and most probably also the operational costs in the initial years of the man-made facilities proposed in this Action Plan, if the private sector fails to make the investments needed to develop these facilities.

This is intended from a double perspective:

- **Financial scheme for destination management organizations (BTB and NSTTF).** While presently government is funding most of the activities undertaken by public tourism organizations (BTB), a new model should be conceived extending the funding sources in order to enlarge the scope of operations. Some of the suggested funding sources are:
 - Governmental funding, subject to annual arrivals and expenditure
 - Business tax
 - Tourist/ Cruise tax
 - Mandatory fees (licenses)
 - Voluntary partnerships
 - Self generated sustainable funds (product booking and merchandising)
 - International funding from WB, IADB, etc.
 - Corporate Social responsibility (CSR)
- **Financial scheme for project development by public entities/ private businesses** to foster investments and to contribute to development. In order to ensure that a minimum critical mass of funding is provided for these investments, the Ministry of Tourism will then need to review their own budget and check with other Ministries how much can be committed to support the tourism master plan through ways such as subsidies, loans, incentives, etc.
 - i. Loans: provide loans through the NSTTF or facilitate the provision of low interest loans through Belizean banks for tourism projects within Belize.
 - i. Subventions: for those projects where the public sector has a major role, provide subventions to projects that support the development of products and/ or destinations.
 - ii. Incentives: this is an essential aspect to foster development in those areas the public sector wishes to promote according to the master plan. Product or destination development in line the master plan objectives should be clearly

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supported by implementing a favorable investment environment through fiscal incentives. Such as: Incentives to promote resort development, hotel upgrading, reconversion of condos to resorts, construction - furniture - decoration (amenities-consumables) with Belizean products, PPT mechanisms implementation, 37 environmental sustainability implementation criteria; local ownerships.

The proposed financial scheme to fund NSTTF tourism projects considers the following sources:

- Tourism development fee for incoming tourist passengers by air and sea
- Tourism development tax for tourism operators
- Selling of property development rights, land lease/concessions
- Repayment of loans and interest of loans
- Multilateral grants/loans
- Contributions, donations, grants and aid agencies of all kinds
- Dividends or the sale of equity holdings and financial instruments
- Technical assistance: evaluation and qualification of investment projects, assistance to the private and public sector

International Donor Organizations are already contributing to Tourism development in Belize and could potentially contribute in the future. Finally it is also crucial to establish a system that could be as much as possible self sustainable from the beginning or in the medium term (maximum 5 years) through the contribution from the private sector or, in general, from the beneficiaries at the destinations.

Initially it is difficult to conceive that the private sector can participate in the funding of the Service Centers and in their operations (to be operated by a business development organization, a role presently undertaken by BELTRAIDE), but funding from private sources should increase progressively. Additionally, established companies should contribute to covering the costs associated to the training of their staff or themselves as entrepreneurs.

Only awareness campaigns, programs and courses need to be funded 100% by the public sector until there is a successful development of tourism and a consolidated private sector.

As far as the business incubators (as previously mentioned, a role proposed to be undertaken by BELTRAIDE) services are concerned, the international experience shows that these services are mostly subsidized. However once again it is important that a small and affordable contribution is requested to the participants to make sure that they give some value to what they are receiving.

For the same purpose, it would be advisable to let know to the participants the real total costs of the training, awareness or technical assistance they are receiving.

- ▶ **Project 4: Public-Private Partnership Scheme development.** It is required to develop a portfolio of projects and initiatives where public-private partnerships are crucial for success in Belize's tourism development. Public sector role is to determine the most important projects having positive impacts where public-private cooperation is crucial for success. This role is proposed to be undertaken by the Belize National Sustainable Tourism Trust Fund (NSTTF).

These should be undertaken in any of the following areas:

- Enhancement and management of large natural, cultural and man-made attractions
- Tourism facilities to be develop at the sites, as well as basic and transport infrastructure development.
- Structure, commercialize and control the quality of tourism products (based on activities combined or not with accommodation and other services).
- Transportation and/ or basic infrastructure development

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Regarding the undertaking of medium or large investment and the management of man-made attractions, the best co-operation model needs to be identified depending on each case according to the proposed one at the strategic approach.

The proposed PPP categories are:

- **Build – Operate – Transfer (BOT):** private sector constructs finances and operates the asset, and after a pre-set time, the ownership is given to the government. This model is frequently used for transportation infrastructure development (airports, roads, etc.).
- **Lease – Develop – Operate (LDO):** government has the ownership of the land or the facilities that are rented to the private sector for operation. This model is used for tourism facilities development, such as hotels, resorts, etc.
- **Build – Own –Operate (BOO):** private sector develops, finances, constructs, and operate services or projects. Public sector commits under a contract to purchase those services the private sector is offering. This model is used for basic infrastructure development.

To implement successfully the PPP framework, the following elements are required:

- **Legal framework:** legal system protecting national and foreign investments, and ensuring compliance of commercial contracts.
- **Legal authority:** governmental agencies dealing with PPP's (NSTTF) should have the authority to sign contracts with the private sector.
- **Contracting process:** to maximize benefits from PPPs, contracting procedures for contract awarding should be transparent, and therefore the entire process should be perceived as legitimate.
- **Public assets:** to be a strong partner in PPPs, the public sector should be providing certain assets, such as land, buildings, subventions, etc.
- **Business environment:** favorable and stable environment promoting business and private investments allowing competition and return on investments. Political and economic stability in addition to political commitment on a long term basis would be playing a key role.
- **Price adjustment:** in case pricing does not reflect cost reality, government should approve price variations with the aim of promoting the required investment to ensure good quality of the service provision.
- **Effective administration:** a PPP contract usually involves additional administrative tasks; therefore government should ensure bureaucracy is taken to minimum level and administrative processes quick and easy.

The types of partnerships that can be formed are:

- **Consortium:** a pooling of resources to gain a benefit that they could not afford on their own (e.g. joint technology, joint services)
- **Concession:** a private company enters into an agreement with the government to have the exclusive right to operate, maintain and carry out investment in a public utility for a given number of years.
- **Joint venture:** co-operative projects (typically bringing different skills/resources) pursue an opportunity. The initiative is often given a "corporate entity" of its own.
- **Strategic alliance:** generally a longer-term agreement to achieve common objectives. May involve both smaller and larger organizations with complementary resources or expertise. Termed "strategic" because the objectives are of critical importance to the overall business/market development strategy of the partners.
- **Co-operative marketing:** an agreement to market partners' products or services through joint promotion. Often relates to maximizing the potential of distribution networks of various partners and gaining familiarity with target markets through an "in-

1.1.5 Sub program for Strengthening of the Tourism Policy

<p>market" partner.</p> <ul style="list-style-type: none"> • Value-chain relationship: where organizations in different industries with unique but complementary skills link their capabilities to create value. The relationship is very tightly knit, with joint or overlapping activities occurring in many areas. • Organization network: a multi-organization alliance in which member businesses collaborate to meet common objectives. • Outsourcing: contracting of non-core services to third-party providers. 	
Lead stakeholders	Strategic Partners
MTCAC, BTB, Belize National Sustainable Tourism Trust Fund (NSTTF)	Governmental ministries NGOs Private sector Associations Universities & scholars BELTRAIDE
Destinations for implementation	
At a national level	
Estimated cost (USD)	Potential financing sources
USD 5,260,000	Governmental funding, subject to annual arrivals and expenditure Business tax Tourist/ Cruise tax Mandatory fees (licenses) Voluntary partnerships Self generated sustainable funds (product booking and merchandising) Multilateral/Bilateral funding Corporate Social responsibility (CSR)

Program for Tourism Satellite Account

Gaps identified – Diagnostic

- ▶ The diagnostic identified that prognostics and data analysis for Belize was experienced to be challenging. This is mostly due to the lack of sound data collection systems and the consistency of data collection or analysis.
 - SIB is the entity responsible for collecting the data at the main border points where tourists are leaving the country. The statistic effort is done for receptive tourism estimates only, because CB is getting estimates for emissive tourism using an indirect method based on exchange control regulation
 - The expenditure due to cruises tourists is estimated using a different method, because most of this is paid to the cruise operators and according to BTB estimates there is a markup rate around 80% on packages sold. However, there are expenses done by their own such as food services and souvenirs bought on visited sites that are not taken into account in estimates
 - The receptive tourism data base is not processed in order to have a differentiated profile for tourists visiting Belize. From a marketing point of view it is quite important to know if tourists behave different according to some characteristics such as nationality, age, income, education
- ▶ SIB is not applying surveys to households for expenditure purposes. The statistics available for hotels is not differentiating between foreigners and local clients, so the estimates for domestic tourism should be done based on a very weak estimate method. There is the idea that this kind of tourism is not very relevant, but it has to be tested at least in some regions or zones of high tourism interest, such as beaches destinations around biggest coast border cities.
- ▶ After a brief tour by the main institutions in charge of tourism statistics, and having done an overview of data available, it can be stated that there are at least basic conditions to undertake a preliminary TSA compilation effort.
- ▶ To do so, a deep revision of some statistical products has to be done, in order to improve the quality of the inference, and to get more comprehensive indicators and economic estimates of tourism impact in the Belizean economy

In order to make strategic decisions on all levels from country level to SME enterprise level, reliable data which can be used as Market Intelligence have to be available to relevant stakeholders.

Vision 2030

By 2030, Belize will have set up a statistical framework for the main tourism characteristic activities, for the main tourism demands that will be used as Marketing Intelligence System and to share data, mechanisms and information especially to further strategically monitor and develop Belize's tourism industry.

Description of the program

The TSA is the reference for organizing the system of tourism statistics, and the scope of the action plan is to define the programs that have to be undertaken to set up a TSA on a regular year base accounting system. Both supply and use of main tourism products estimates are required to get the

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main tables defined by WTO for the TSA compilation. It is important to mention that SIB is working on a work plan for the UNWTO TSA process. This institution has identified some restrictions at:

- Outbound tourism expenditure, by products and classes of visitors
- Tourism gross fixed capital formation of tourism industries and other industries
- Tourism collective consumption, by products and levels of government

Although those restrictions, this program addresses all tasks and projects, including those items, in order to keep them valid for the integral work to be done for the TSA. Furthermore, the identified restrictions can be solved by extra budget support.

Lead stakeholder

The lead responsible to develop the TSA program will be the SIB with support from the BTB research and statistics team. For specific tourist data collection, SIB will partner with Belize's Migration Department, Central Bank, GST, Private sector associations (ie BHA) and/or BTB to develop tourism surveys and to obtain required data.

Objectives

- ▶ To identify and locate main suppliers of services along the country
- ▶ To create an economic information system compiled periodically using different statistical tools
- ▶ To create a systematic and permanent surveys program
- ▶ To design according to UNWTO of Surveys for international tourism to reinforce policy makers statistical tools
- ▶ To increase accuracy of estimates of visitors accounting
- ▶ To define the domestic tourist flows and obtain estimates through households surveys
- ▶ To aid the industry in decision making through the availability of reliable and relevant statistical information

Milestones

Review Years	Milestones
2015	<ul style="list-style-type: none"> ▶ The entire Tourism Satellite Account is settled and working ▶ First Belize TSA Report
2020	<ul style="list-style-type: none"> ▶ TSA ongoing
2025	<ul style="list-style-type: none"> ▶ TSA ongoing
2030	<ul style="list-style-type: none"> ▶ TSA ongoing

1.1.6 Subprogram for TSA Tourism Activities Production Estimates

Description and projects		Time frame
<p>The aim of the program is to set up a statistical framework for the main tourism characteristic activities. The tourism statistical system is part of a major quantitative effort addressed to national accounts compilation, but it has to be worked out with specific statistical tools. A directory for tourism characteristic activities is the core of any statistical inference method based on surveys applied to producers to characterize economic flows and define the share of tourism in GDP. This sub-program has to be coordinated with the Marketing Intelligence System, in order to share data, mechanisms and information. Three main projects have to be developed to put in place a tourism statistical system.</p> <p>The proposal for creating a new TSA account takes into consideration that an analytical team of statisticians specialized in tourism need to be created. The budget already takes into consideration strengthening the SIB institution as well as revisions, capacity building and constant monitoring of the TSA program.</p> <ul style="list-style-type: none">▶ Project 1 Tourism Characteristic Activities Directory. SIB would be the agency responsible for such a project. Compiling Data from tax authorities, and from other public directories, a specific Directory for main tourism activities would be set up to define a proper inference framework to obtain estimates for main economic supply variables.▶ Project 2 Inference Method Design. Once a Directory is available, the applied inference method has to be designed. The specification of a survey has to be derived to get estimates for each one of the activities covered by the Directory. SIB and BTB should work together in this project to define the statistical scope of such estimates according to budget constraints and policy maker needs.▶ Project 3 Characteristic Tourism Producers Survey. Forms, Field survey organization and training for field personnel are a key process for a successful survey. SIB and BTB would work together to prepare a systematic and permanent yearly survey to producers.		<p>Project 1: Starting date: 2012 Implementation: 2 years</p> <p>Project 2: Starting date: 2014 Implementation: 1 year</p> <p>Project 3: Starting date: 2015 Implementation: 1 year</p>
Lead Responsible	Strategic Partners	
SIB	BTB Ministry of Finance - GST BHA - BTIA – BTOA – BCTA	
Destinations for implementation		
Nationwide		
Estimated cost (USD)	Potential financing sources	
USD 180,000	UNDP, IDB, UNWTO	

1.1.7 Subprogram for Accounting and Tourism Demand Estimates

Description and projects		Time frame
<p>The aim of the program is to set up a statistical framework for the main tourism demands. International tourism expenditure is only estimated for receptive tourism, and getting a grand total for daily expenses. Tourism satellite account estimates are mostly derived from tourist's expenditure, so resident tourists expenses made within the country and abroad will define the national tourism expenditure, and expenses of non residents added to those of residents made within the country define the domestic tourism expenditure. All these estimates require a specific inference framework: nonresident visitor entries, residents leaving the country and tourist habits and expenses surveys have to be permanently collected and processed. This sub-program has to be coordinated with the Marketing Intelligence System, in order to share data, mechanisms and information.</p> <p>The proposal for creating a new TSA account takes into consideration that an analytical team of statisticians specialized in tourism need to be created. The budget already takes into consideration strengthening the SIB institution as well as revisions, capacity building and constant monitoring of the TSA program.</p> <ul style="list-style-type: none">▶ Project 1 Receptive and Emissive tourism surveys. SIB would be the agency responsible for such a project. A detailed expenditure form has to be included in the current survey applied to visitors leaving the country. A survey for residents who come back to the country is also a need for TSA compilation. So a field statistical process is required to apply the emissive tourism survey at the airport and main land frontier controls. It is important to mention that entry survey cards/forms to be filled and then deposit somewhere when the visitor leaves is not a good method, since international experiences have demonstrated that it fails of accuracy and is difficult to be used.▶ Project 2 Entry/Exit records process. It is very important to get accurate statistics for arriving and leaving passengers in order to identify properly tourists, excursionists and workers who are involved in daily flows over the frontiers throughout the country. SIB, BTB and Migration Department are the organizations that should define the official accounting of people that arrive and leave the country every day. The estimate of tourism demand is based on these records.▶ Project 3 Domestic Tourism Estimates. A specific survey to households for domestic tourism estimates has to be set up by SIB. The inference framework and the field organization, as well as the questionnaires have to be worked out with the support of international assistance.		<p>Project 1: Starting date: 2012 Implementation: 1 year</p> <p>Project 2: Starting date: 2012 Implementation: 1 year</p> <p>Project 3: Starting date: 2013 Implementation: 3 years</p>
Lead Responsible	Strategic Partners	
SIB and BTB	Central Bank Migration Department BHA - BTIA – BTOA – BCTA	
Destinations for implementation		
Nationwide		
Estimated cost (USD)	Potential financing sources	
USD 180,000	UNDP, IDB, UNWTO	

Program for Tourism Safety and Security

Gaps identified - Diagnostic

- ▶ There is a general sense of insecurity and lack of guard and police presence as well as lack of law enforcement and perception of police corruption by the industry private sector and tourist.
- ▶ More significantly there is a general lack of trust by tourist in the safety and security response leading to many crimes becoming unreported.
- ▶ Belize is ranked as one of the countries with the highest homicide rate in the Americas region, there is also high incidence of armed robberies of tourists, drug trafficking, human trafficking and gang activity, and sexual assault.
- ▶ Armed robberies of tourists are most frequently occurring at archeological sites, national parks and other frequently visited tourist assets
- ▶ Insufficient surveillance, assistance and safety mechanisms provided to tourists and visitors at the destinations, facilities and/or on specific tourism sites.
- ▶ Weak mechanism of reporting and monitoring of crimes against tourists
- ▶ Though there is a Tourism Police Unit, currently under the Police Department, they are underfunded and understaffed, and often cover duties of regular police instead of Tourism police.
- ▶ Though there is a National Natural Disaster Management response lead by NEMO, there is not a comprehensive and structured response to natural disasters and other crisis that affect the tourism industry.

International tourists perceive safety and security as one of the most important factors in selecting a destination to travel. Additionally, they are to a greater extent accepting safety and security procedures and programs as a routine and more importantly viewing it necessary to help ensure safe travels.

Vision 2030

By 2030, Belize will have developed and will be implementing a National Tourism Safety and Security Plan which will aim to structure and enhance the safety and security issues in Belize in order to position itself as a safe tourism destination. Additionally, it will count with a National Tourism Disaster and Crisis Management Plan that will aim to aid the tourism sector in mitigating, responding, and recovering from a crisis.

Description of the program

As a solution to the issues the following program plans to proactively address surveillance and response mechanism through the creation of a **National Tourism Safety and Security Plan**:

The **Sub-program for Visitor Safety Awareness and Support Services** creates the appropriate channels to aiding and supporting tourists in the event of victimization and emergency situation.

Additionally, the program promotes the creation of the **National Tourism Disaster and Crisis Management Committee (TDCMC)** with the goal of reducing losses related to natural disasters and

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other shocks to the industry by allocating resources to increase disaster resilience, cooperation in evacuation procedures and business continuity planning.

The program Increases visitor confidence in Belize as a safe and secure tourism destination by providing centralized and relevant informational material about safety tips, accessible emergency response assistance as well as an effective search and rescue program in the event of distress, imminent danger, or lost person.

Lead stakeholders

MTCAC and the Police Department –TPU would be responsible develop strategies and programs to enhance the visitor's safety and security at the destinations, at sites and to develop communication/awareness programs specially dedicated to visitors. The MTCAC should lead the formation of the National Disaster & Crisis Management Committee along with lead stakeholders of the industry.

Objectives

- ▶ To prevent crime and visitor victimization
- ▶ To support and strengthen criminal deterrence and law enforcement efforts
- ▶ To provide assistance to visitors who are victims of crimes, accidents, and other emergency situations or adversities
- ▶ To reduce the impact of natural disaster and industry crisis
- ▶ To increase visitor confidence in Belize as a safe and secure tourism destination

Milestones

Review Years	Milestones
2015	<ul style="list-style-type: none"> ▶ National Tourism Safety and Security Plan completed ▶ Increase TPU task unit and capacity building programs developed ▶ Begin deployment of TPU and joint forces
2020	<ul style="list-style-type: none"> ▶ Revision of National Tourism Safety and Security Plan ▶ Launch visitor safety awareness raising and devise immediate assistance networks ▶ Create the National Tourism Disaster and Crisis Management Committee ▶ All regional search and rescue task team units formed
2025	<ul style="list-style-type: none"> ▶ Revision of National Tourism Safety and Security Plan
2030	<ul style="list-style-type: none"> ▶ Revision of National Tourism Safety and Security Plan ▶ Revision of the National Tourism Disaster and Crisis Management Plan

Proposed subprograms and projects

1.1.8 Sub-program for Tourism Proactive Policing

Description of project Projects	Time frame
<p>Assess the health and security risks and create a risk management plan by destination that will become the Belize National Tourism Safety and Security Plan. In addition, addresses tourism police unit capacity skills development in order to become the primary and most adapt security response team for the tourism industry. And finally, executes the surveillance plan in key areas with the appropriate format.</p> <p>► Project 1: Belize National Tourism Safety and Security Plan (NSSP). Improved partnerships in terms of data collection and mapping of crimes to identify the “hotspots”. Conduct risk assessment of tourism vulnerability for consolidated and new destinations in order to fully understand the risks associated to health, crime, and environment. The assessments should be carried out in phases and by high risk priority criteria, such as:</p> <ul style="list-style-type: none"> • Assessment of high risk destinations and victim service plan (eg Belize city, ambergris caye) • Assessment of second priority destinations and victim service plan (eg. Hopkins, Corozal) • Assessment of key sites and remote areas and victim service plan (eg. Caracol, Victoria Peak) <p>Integrate public police agency and private sector security professional to contribute to providing solutions to visitor safety/security planning. Develop a victim service plan that will address safety and security guidelines and support services. Including mechanisms to improve the reporting and monitoring of crimes against tourists.</p> <p>As a result create the Belize National Tourism Safety and Security Plan.</p> <p>► Project 2. Strengthening tourism police unit. Currently the TPU is under the jurisdiction of the Belize Police Department. As a mid-term goal there is for the TPU to be placed under the control of the MTCAC with the long term goal of becoming its own independent entity. However, further analysis of the TPU model and a derived final governance structure should be decided and put in place.</p> <ul style="list-style-type: none"> • A Benchmark of successful models of TPU in other countries should be analyzed. • Feasibility analysis of sustainable funding sources and governance structure applicable to the Belizean context should be carried out <p>As a short-term goal, the current Tourism police force needs to go through a full flush of corrupt agents, recruit new agents and increase capacity building skills.</p> <ul style="list-style-type: none"> • The first task is to evaluate current tourism police force and purge of corrupt agents • Second task will be to encourage regular police officers to specialize and join the “tourism police unit” and minimize corruption by providing incentives in the form of prestige and monetary retribution. • Third will be to Identify high priority needs in tourism police training program and operations and create a yearly plan to encourage and strengthen the task force by: <ul style="list-style-type: none"> ○ Promoting police agency to adopt specific proactive policing training programs such as Tourism Oriented Policing and Protective services (TOPPS) for new recruits and in-house refresher courses. ○ Offering tourism police training scholarships for new trainees. ○ Sponsoring workshops/seminars for police body and private sector security professionals in the importance of tourism in the local economy and how to best protect it. • Forth task is to devise a mechanism of monitoring, evaluating and 	<p>Project 1: Starting date: 2012 Implementation: assessments 3 years, revision every 5 years</p> <p>Project 2: Starting date: 2014 Implementation: 3 years for initial training; then continuous</p> <p>Project 3: Starting date: 2016 Duration: continuous</p>

1.1.8 Sub-program for Tourism Proactive Policing

continuous improvement of TPU effectiveness and follow-up with corrective actions.

- **Project 3: Increase surveillance in tourism destinations.** Once the NSSP has been completed promote increase in security surveillance in areas of high tourism concentration and vulnerable “hotspot” areas. Deployed officers should be able to move freely through pedestrian and sea areas and be easily accessible and therefore should be best placed on bike, foot, moped, horse or boat whenever possible. As support mechanisms and to address the issue of lack of enough tourism police force possible solutions are:

- Partnering with private security agencies
- Creating a joint task force with other law enforcement agencies at local and national level (ie national police, military police, coast guard “guardsmen”)
- Growth of ‘special constable’ program
- Enlist community members for community policing or “neighborhood watch” strategy.
- Use of surveillance cameras in hotels, sites and other areas of high tourism concentration

Lead Responsible	Strategic Partners
MTCAC - Tourism Police Unit	Private security professionals BTIA Ministry of Tourism Police Department Belize Coast Guard BTB
Destinations for implementation	
Nation wide High priority areas for increase surveillance: Belize City & Ambergris Caye	
Estimated cost (USD)	Potential financing sources
USD 2,650,000	Private sector sponsorship Ministry of Tourism Police Department Tourism Police Unit Multilateral support

1.1.9 Sub-program for Visitor Safety Awareness and support services

Description of project Projects	Time frame
<p>Increases visitor confidence in Belize as a safe and secure tourism destination by providing centralized and relevant informational material about safety tips, accessible emergency response assistance as well as an effective search and rescue program in the event of distress, imminent danger, or lost person.</p> <p>► Project 1: Safety visitor awareness raising immediate assistance networks. Partings from the results of the NSSTP develop a national and destination awareness campaign and support services. The program should give specific safety and security prevention tips and information on emergency support services. Informational material to be delivered to visitors through several distribution channels (i.e. airports, sea ports, border control, car rental agencies, hotels, tourist information centers, among others).</p> <ul style="list-style-type: none"> Informational material can be communicated in the following formats: <ul style="list-style-type: none"> <i>“Be smart, Be safe” visitor brochures.</i> Each destination should develop their own brochure that will focus on specific security issues, prevention tips and emergency support services specific for their destination. Additionally a country wide brochure that covers basic safety/security concerns should be issues. These brochures should be translated to all appropriate languages of main markets by destination. <i>Service provider multi-media technology material to convey safety messages.</i> Produce multiple multi-media security information material for tourist to be distributed to tourism operators such as (1) In-room video for hotels and resorts (2) Baggage claim area safety video (3) Audio CD for rental cars (4) DVD for laptop business travelers. Information should be available in all appropriate languages of main markets by destination. Parting from the response mechanisms derived from the NSSTP create support services that will aid tourists in the event of victimization, injury or death. Appropriate channels to offer support are: <ul style="list-style-type: none"> Create a web-site with all centralized appropriate information from the public and private sectors Use tourism information/welcome centers (TICs & TWC) platforms for disseminating safety & security information and providing victim counseling and appropriate case handling. Appropriate training for attendants/counselors should take place prior. Update services provided from the current call center and 1-800 toll free numbers for visitor safety and security information and assistance. The hotline should be opened 24h and offer assistance in providing health and security information and help in the case of emergency in various languages. Appropriate training for attendants/counselors should take place prior. <p>► Project 2: National Tourism Disaster and Crisis Management Committee (TDCMC) The tourism industry could further reduce losses related to natural disasters and other crisis by allocating resources to increase disaster resilience, cooperation in evacuation procedures and business continuity planning.</p> <ul style="list-style-type: none"> <u>Establish a lead committee:</u> This commission would comprise of key leaders and influencers of the tourism industry public and private sector representation. The committee will be responsible for: <ul style="list-style-type: none"> Lobbing for relevant policy changes Searching for sustainable funding sources: <ul style="list-style-type: none"> Multilateral support 	<p>Project 1: Starting date: 2015 Duration: continuous</p> <p>Project 2: Starting date: 2017 Implementation: ongoing</p>

1.1.9 Sub-program for Visitor Safety Awareness and support services

- Government support with HR and office equipment
- Industry fees
- Creating a Tourism Disaster and Crisis Management Plan (TDCMP). The plan should address at least the following items:
 - Potential tourism shocks (direct and indirect)
 - Potential tourism impacts (short-term and medium/long term)
 - General response mechanism (Pre-shock and Post-shock)
 - Specific response themes (Communication, research, marketing, business/industry continuity aid)
- Special purpose plans, such as the formation of a Search and Rescue teams for the response in the case of tourist in distress. Given Belize growing potential in adventure tourism, the high risk involved in the activities and the lack of a national security response and accessibility constraints to remote areas. The Search & Rescue special purpose plan should include at least the following:
 - High risk areas and type of tourism operations taken place.
 - Appropriate procedure to be executed by type of emergency and location of the emergency.
 - List of task teams members with assigned duties. The members can come from the public, private and community sectors, in the case of the private and community individuals on a voluntary basis.
 - List of appropriate capacities needed by duties (e.g. first aid, search and rescue in forest areas - flooded areas - ocean, among others).
 - List of medical facilities and other support services needed by area
 - List of available resources for the teams (dogs, planes, helicopters, vehicles, etc)

Lead Responsible	Strategic Partners
Police Unit coordinator) BTB - Quality TDMC	BTIA Ministry of Tourism Police Department Ministry of Natural Resources and the Environment Belize Emergency Response Team (BERT) Fire department Forest department
Destinations for implementation	
Nationwide	
Estimated cost (USD)	Potential financing sources
USD 3,450,000	Ministry of Tourism Ministry of National Security and Immigration Multilateral support

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National Tourism Governance Macro Program Implementation Schedule

Project/Year	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
1. Program for Global Governance & Management																			
Sub-program for Tourism governance structures at national and regional levels																			
Project 1: Create the Tourism Ministerial Council																			
Project 2: Strengthen the National Board of BTB																			
Project 3: Set up Regional Committees at a destination level																			
Sub program for Strengthening the Management Structure for Tourism Development																			
Project 1: Strengthen institutional tourism management																			
Sub-program for National Sustainable Tourism Development Trust Fund																			
Project 1: Establishment of Tourism Development Trust Act																			
Project 2: Tourism Development Trust Pilot phase																			
Project 3: Creation of the National Sustainable Tourism Trust (NSTT) statutory body																			
Sub-program for Strengthening of Investment attraction and tourism SME development																			
Project 1: Enhance investment climate environment of Belize																			
Project 2: Attract foreign direct Investment and international hotel brands																			
Project 3: Enhance service delivery to investors and developers																			
Project 4: Encourage professionalization of the SME tourism community																			
2. Program for Tourism Policy																			
Sub program for Strengthening of the Tourism Policy																			
Project 1: Political and public actors lobbying and partnering																			
Project 2: Legal framework development																			
Project 3: Financial scheme development.																			
Project 4: Public-Private Partnership Scheme development																			
3. Program for Tourism Satalite Account																			
Sub.program for Tourism Activities Production Estimates																			
Project 1 Tourism Characteristic Activities Directory																			
Project 2 Applied Inference methods																			
Project 3 Characteristic Tourism producers Survey																			
Sub.program for Tourists accounting and tourism demand estimates																			
Project 1 Receptive and Emissive Tourism Surveys																			
Project 2 Entry/Exit Records Processing																			
Project 3 Domestic Tourism Estimates																			
4. Program for Tourism Safety and Security																			
Sub-program 1. Tourism Proactive Policing																			
Project 1.Belize National Tourism Safety and Security Plan.																			
Project 2.Strengthening tourism police unit training.																			
Project 3.Increase surveillance in tourism destinations.																			
Sub-program 2. Visitor Safety Awareness and support services																			
Project 1.Safety visitor awareness raising and immediate assistance networks.																			
Project 2.National Tourism Disaster and Crisis Management Committee (TDCMC)																			

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National Tourism Governance Macro Program Cost Model

Governance Budget										
Project/Year	Total (US\$)	2012	2013	2014	2015	2016	2017	2018	2019	2020
Program for Global Governance & Management	32,430,000	1,450,000	2,410,000	2,810,000	2,810,000	2,810,000	2,810,000	1,310,000	1,310,000	1,610,000
Sub-program for Tourism governance structures at national and regional levels	3,150,000	450,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000
Project 1: Create the Tourism Ministerial Council	200,000	200,000								
Project 2: Strengthen the National Board of BTB	250,000	250,000								
Project 3: Representation through Destination Coordinators	2,700,000		150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000
Sub program for Strengthening the Management Structure for Tourism Development	4,030,000	250,000	210,000	210,000	210,000	210,000	210,000	210,000	210,000	210,000
Project 1: Strengthen institutional tourism management	4,030,000	250,000	210,000	210,000	210,000	210,000	210,000	210,000	210,000	210,000
Sub-program for National Sustainable Tourism Development Trust Fund	7,700,000	200,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	-	-	-
Project 1: Establishment of Tourism Development Trust Act	200,000	200,000								
Project 2: Tourism Development Trust Pilot phase	3,000,000		1,500,000	1,500,000						
Project 3: Creation of the National Sustainable Tourism Trust (NSTT) statutory body	4,500,000				1,500,000	1,500,000	1,500,000			
Sub-program for Strengthening of Investment attraction and tourism SME development	17,550,000	550,000	550,000	950,000	950,000	950,000	950,000	950,000	950,000	1,250,000
Project 1: Enhance investment climate environment of Belize	600,000	300,000								300,000
Project 2: Attract foreign direct investment and international hotel brands	4,750,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000
Project 3: Enhance service delivery to investors and developers	5,400,000		300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000
Project 4: Encourage professionalization of the SME tourism community	6,800,000			400,000	400,000	400,000	400,000	400,000	400,000	400,000
Program for Tourism Policy	5,260,000	650,000	695,000	345,000	395,000	345,000	345,000	345,000	345,000	395,000
Sub program for Strengthening of the Tourism Policy	5,260,000	650,000	695,000	345,000	395,000	345,000	345,000	345,000	345,000	395,000
Project 1: Political and public actors lobbying and partnering	1,750,000	200,000	125,000	75,000	125,000	75,000	75,000	75,000	75,000	125,000
Project 2: Legal framework development	1,650,000	450,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000
Project 3: Financial scheme development	300,000		300,000							
Project 4: Public-Private Partnership Scheme development	1,560,000		120,000	120,000	120,000	120,000	120,000	120,000	120,000	120,000
Program for Tourism Satellite Account	240,000	56,000	64,000	56,000	64,000	-	-	-	-	-
Sub-program for Tourism Activities Production Estimates	120,000	28,000	28,000	28,000	36,000	-	-	-	-	-
Project 1: Tourism Characteristic Activities Directory	56,000	28,000	28,000							
Project 2: Applied Inference methods	28,000			28,000						
Project 3: Characteristic Tourism producers Survey	36,000				36,000					
Sub-program for Tourists accounting and tourism demand estimates	120,000	28,000	36,000	28,000	28,000	-	-	-	-	-
Project 1: Receptive and Emissive Tourism Surveys	14,000	14,000								
Project 2: Entry/Exit Records Processing	14,000	14,000								
Project 3: Domestic Tourism Estimates	92,000		36,000	28,000	28,000					
Program for Tourism Safety and Security	6,100,000	100,000	100,000	200,000	350,000	400,000	500,000	500,000	500,000	500,000
Sub-program 1. Tourism Proactive Policing	2,650,000	100,000	100,000	200,000	100,000	300,000	200,000	200,000	200,000	300,000
Project 1: Belize National Tourism Safety and Security Plan.	600,000	100,000	100,000	100,000						100,000
Project 2: Strengthening tourism police unit training.	300,000			100,000	100,000	100,000				
Project 3: Increase surveillance in tourism destinations.	1,750,000					200,000	200,000	200,000	200,000	200,000
Sub-program 2. Visitor Safety Awareness and support services	3,450,000	-	-	-	250,000	100,000	300,000	300,000	300,000	200,000
Project 1: Safety visitor awareness raising and immediate assistance networks.	1,750,000				250,000	100,000	100,000	100,000	100,000	100,000
Project 2: National Tourism Disaster and Crisis Management Committee (TDCMC)	1,700,000						200,000	200,000	200,000	100,000
TOTAL BUDGET GOVERNANCE MACRO PROGRAM	44,030,000	2,256,000	3,269,000	3,411,000	3,619,000	3,555,000	3,655,000	2,155,000	2,155,000	2,505,000

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Governance Budget

Project/Year	Total (US\$)	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Program for Global Governance & Management	32,430,000	1,310,000	1,310,000	1,310,000	1,310,000	1,310,000	1,310,000	1,310,000	1,310,000	1,310,000	1,310,000
Sub-program for Tourism governance structures at national and regional levels	3,150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000
Project 1: Create the Tourism Ministerial Council	200,000										
Project 2: Strengthen the National Board of BTB	250,000										
Project 3: Representation through Destination Coordinators	2,700,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000
Sub-program for Strengthening the Management Structure for Tourism Development	4,030,000	210,000	210,000	210,000	210,000	210,000	210,000	210,000	210,000	210,000	210,000
Project 1: Strengthen institutional tourism management	4,030,000	210,000	210,000	210,000	210,000	210,000	210,000	210,000	210,000	210,000	210,000
Sub-program for National Sustainable Tourism Development Trust Fund	7,700,000	-	-	-	-	-	-	-	-	-	-
Project 1: Establishment of Tourism Development Trust Act	200,000										
Project 2: Tourism Development Trust Pilot phase	3,000,000										
Project 3: Creation of the National Sustainable Tourism Trust (NSTT) statutory body	4,500,000										
Sub-program for Strengthening of Investment attraction and tourism SME development	17,550,000	950,000	950,000	950,000	950,000	950,000	950,000	950,000	950,000	950,000	950,000
Project 1: Enhance investment climate environment of Belize	600,000										
Project 2: Attract foreign direct investment and international hotel brands	4,750,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000
Project 3: Enhance service delivery to investors and developers	5,400,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000
Project 4: Encourage professionalization of the SME tourism community	6,800,000	400,000	400,000	400,000	400,000	400,000	400,000	400,000	400,000	400,000	400,000
Program for Tourism Policy	5,260,000	195,000	195,000	195,000	195,000	245,000	75,000	75,000	75,000	75,000	75,000
Sub-program for Strengthening of the Tourism Policy	5,260,000	195,000	195,000	195,000	195,000	245,000	75,000	75,000	75,000	75,000	75,000
Project 1: Political and public actors lobbying and partnering	1,750,000	75,000	75,000	75,000	75,000	125,000	75,000	75,000	75,000	75,000	75,000
Project 2: Legal framework development	1,650,000										
Project 3: Financial scheme development	300,000										
Project 4: Public-Private Partnership Scheme development	1,560,000	120,000	120,000	120,000	120,000	120,000					
Program for Tourism Satellite Account	240,000	-	-	-	-	-	-	-	-	-	-
Sub-program for Tourism Activities Production Estimates	120,000	-	-	-	-	-	-	-	-	-	-
Project 1: Tourism Characteristic Activities Directory	56,000										
Project 2: Applied Inference methods	28,000										
Project 3: Characteristic Tourism producers Survey	36,000										
Sub-program for Tourists accounting and tourism demand estimates	120,000	-	-	-	-	-	-	-	-	-	-
Project 1: Receptive and Emissive Tourism Surveys	14,000										
Project 2: Entry/Exit Records Processing	14,000										
Project 3: Domestic Tourism Estimates	92,000										
Program for Tourism Safety and Security	6,100,000	300,000	300,000	300,000	300,000	400,000	250,000	250,000	250,000	250,000	350,000
Sub-program 1. Tourism Proactive Policing	2,650,000	100,000	100,000	100,000	100,000	200,000	50,000	50,000	50,000	50,000	150,000
Project 1. Belize National Tourism Safety and Security Plan.	600,000					100,000					100,000
Project 2. Strengthening tourism police unit training.	300,000										
Project 3. Increase surveillance in tourism destinations.	1,750,000	100,000	100,000	100,000	100,000	100,000	50,000	50,000	50,000	50,000	50,000
Sub-program 2. Visitor Safety Awareness and support services	3,450,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000
Project 1. Safety visitor awareness raising and immediate assistance networks.	1,750,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
Project 2. National Tourism Disaster and Crisis Management Committee (TDCMC)	1,700,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
TOTAL BUDGET GOVERNANCE MACRO PROGRAM	44,030,000	1,805,000	1,805,000	1,805,000	1,805,000	1,955,000	1,635,000	1,635,000	1,635,000	1,635,000	1,735,000

2. ANNEX I : Tourism Satellite Account Framework

Institutional Framework for Belize's Tourism Satellite Account

Most institutions are already working on the production of basic data that are critical for obtaining estimates for tourism main economic activities. However, the institutional framework needs to be addressed in a way to strengthen the basic data production, on one hand, and on the other, the analysis capabilities developed.

Surveys

Belize's main basic data are compiled by the SIB, and the ones on tourism are not the exemption. International Receptive Tourism is characterized by a survey worked out on a monthly statistical procedure in airports and main border points.

This survey has been set up to obtain an accurate estimate of total expenditure due to foreign visitors arriving in Belize. Another relevant parameter obtained from that survey is the average length of stay. Combining those two estimates, it is possible to get the global expenditure of receptive tourism as it is calculated by Central Bank and BTB, using the statistics of total visitors during the compilation year.

For tourism analytical purposes, that kind of information is useful, but it is clearly not enough to evaluate how the tourism sector is doing the job. The total expenditure needs to be described with some detail, in order to be able to appreciate the services that are consumed by visitors, the quality and extent of supply, especially the one related with characteristic producers.

Receptive Tourism

Receptive Tourism has to be estimated for STA compilation. Actually, a basic survey is set up on a monthly basis but its contents are not enough to get a proper characterization of foreign visitors that can be classified as receptive tourists. Total expenditure and length of stay are the main parameters obtained for each of the main countries of residence given by surveyed visitors every month.

The actual form has to be deeply reviewed in order to introduce more useful data to describe the main expenditures made by visitors. Furthermore, the length of stay is a useful parameter, but quite a restrictive one if some analysis has to be done to strengthen promotion, accommodation availability and standards, transport facilities and other key variables for tourism developing.

UNWTO has developed a set of forms for tourism surveys that can be adapted easily for Belize's needs. BTB and SIB have to work out together this process, and they can receive support from a specialist on these statistical matters.

There is no doubt that the inference methods have to be revised in order to empower the different types of analysis that can be done. It is important to be able to differentiate visitors according to standard categories, such as nationality and main sites visited during their stay. The size of samples

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should be reviewed under this new scope to make possible different inference methods that would make possible to diversify the available estimates.

At least, main characteristic tourism goods and services consumed by visitors have to be accurately estimated, and main user (in this case BTB) has to define the set of variables that is needed to improve tourism performance in Belize. So, an analytical unit is needed at BTB to be responsible for the design, revision and performance of surveys and inference processes involved to get final estimates to be used for tourism improvement.

Visitors arriving on international cruises are part of receptive tourism. Special surveys have to be designed, as well as procedures to get an accurate inference method to obtain estimates on their expenditures, even those done in an indirect way when they purchase all included packages. Complementary expenditures have to be identified in order to get the actual demand of tourism services in main destinations for cruise visitors.

Hotel Occupancy

There is quite good information available for hotel activity, but it is necessary to apply some consistency tests. Balance of Payment, National Accounts and fiscal budget records have to be calibrated properly in order to improve the estimates of the revenues involved, the average tariff paid by tourists, and finally to fix a consistent estimate for occupancy rate according to the global demand of visitors and their length of stay.

Once again, an analytical unit at BTB should be in charge of that sort of data set up for accommodations available throughout the country. The information is not useful on a national scope only, but it has to be available for main cities or villages that are important destinations for visitors. This kind of information should be compared against the estimates obtained from surveys addressed to foreign and domestic visitors to make a consistency checking process to validate all estimates.

Domestic Tourism

According to different perceptions that have people working in different institutions, domestic tourism is not so relevant, but even under this assumption some destinations might be most preferred by domestic households. There is the idea that this kind of tourism is not very relevant, but it has to be tested at least in some regions or zones of high tourism interest, such as beaches destinations around biggest coast border cities. To make right assumptions a procedure to get estimates for domestic tourism has to be undertaken. Again, this is a study that has to be accomplished by both BTB and SIB. A proper survey has to be designed, and once having results available, the update procedure might be defined.

In order to set up this kind of survey, a two step strategy can be adopted to make a rational inference methodology. The first step is designed to identify the households that are used to have domestic tourism as part of their habits. The second step has the intent to get a description of all the tourism activities they do along the year.

The outcomes of such a research study would enlighten how relevant could be the emissive tourism for high income Belizean households. Net impact of tourism on the economy can only be defined if estimates are available for all kind of tourism categories.

Emissive Tourism

SIB is not applying surveys to households for expenditure purposes. In addition, there is not a survey applied to Belizean citizens coming back at the airport or at main border line points. So, all the procedure has to be defined by an institution having the coordinating facilities and capabilities. Again, the suggestion is to have the analytical unit at BTB in charge of the coordinating actions that need such a statistical procedure to get estimates for emissive tourism.

The Migration department is a key institution to define all inference procedures related with international tourism visitors. Not only foreign visitors have to be controlled, from a statistical point of view, but also Belizeans coming back home because of international visits they undertake throughout the year. Balance of payments, TSA and BTB need to have an estimate procedure to define the flow of people traveling abroad and their expenditure habits. Is it a matter of competitiveness of local destinations, a lack of promotion, a lack of interest from households, or are there other motivations such as trade, or business that are the main motivational issues for locals going abroad?

Visitors Records

The Immigration Department is responsible for the visitor registration procedures that are the main source available for estimates and statistical inference made for international tourism. The accuracy of such procedures has been improving along time, but some technological investment needs to be assumed.

An electronic lecture of visitor travel documents, and locals coming back home are urgent needs to improve the tourism statistical system. International airport and most significant border control points should be working in an on-line registration software and hardware network. BTB and Immigration Department should prepare an investment project in order to get the relevant hardware and software needs, and the human capital investment to be done in order to get in the short term such a system at work.

A second issue to tackle, in the short term, is the registration of visitors coming on international cruises. How many of them are disembarking is a key issue for marketing purposes, and the different ways to coordinate both public and private actions to increase the volume of visitors arriving to Belize by this mean of transport. A simple procedure has to be undertaken between cruise operators and government authorities to be able to compile a set of basic data describing clearly the services provided by local tour operators to those visitors classified as excursionists. However, they are economically relevant because they are users of a chain of value that operates along the country. Then, a statistical operation should be put in practice to know more about the additional expenses done during the one day stay. Such an operation may be undertaken on the most preferred visited sites by cruise excursionist, and a short form according to random selection criteria should be applied. The contents of that form would have to be defined by tourism authorities to analyze properly all the economic potential of cruise visitors as well as the satisfaction degree they are obtaining from local suppliers of tourism characteristic and connected products.

A systematic compiling process is mandatory in order to get the actual weight of all kind of tourism, both international and domestic. The economic weight is a combination of length of stay, places visited, daily expenditure, structure of consumption, and income of visitors. So, the tourism statistics

system has to develop all the sources that make possible such estimates to be obtained. Institutions linked to private or public tourism activities need to develop a chain of interaction in order to empower basic data and research available for different actors developing tourism activities and investment.

Institutional Coordination and Human Capital Needs

BTB has the main responsibility to develop sustainable tourism in Belize, but in order to reach that aim, coordinated actions have to take place with SIB and the Migration Department. All three organizations represent the core of the tourism statistical system, and the quality of their estimates is a conditioning factor for getting better public policies for the performance of tourism services suppliers along the country.

A Master Plan has to assume the challenge of all and each of these three institutions, because decision making process undertaken by stakeholders needs the tools necessary to evaluate if things are going what they are supposed to be. Without basic data and information compiled in a proper manner by technically prepared analysts, the whole plan would have a lack of supporting framework based on statistics currently set up. It is quite relevant to know and characterize the starting point and the feasibility of all actions to be undertaken, but the dynamics observed as a response to institutional promotion and public policy choices can be much more significant in order to reach the targeted state designed by mean of the Master Plan.

Institutional Coordination

Institutional coordination has to be organized according to the information needs coming from a wide range of users but at the same time recognizing institutional restrictions that exist in each moment of time. Users should be characterized by mean of decision makers, on both public and private sector, but also considering the key actor: visitors to each of the tourism attractions available within the national territory.

A continuous evaluation process of tourism public policies is a requirement for continuous improvement, in a region where the competitiveness is increasing on time. Many countries in the Caribbean have been developing aggressive marketing but at the same time they are committed with policies to promote their tourism attractions and to offer a wide range of options to the visitors arriving to their countries. A better information system is an important base line to put in place quality standards, not only for facilities but also for public services provided by government institutions.

According to the mission and vision of BTB, the coordination actions to improve basic data availability and the tourism statistical system which in fact is a systemic model to give internal coherence to all data describing different issues relevant for tourism activities and for supporting decision making, point out that BTB is the institution in charge of such information system.

An analytical unit at BTB should be responsible for the tourism statistical system. Therefore, the aim is not being involved in basic data collection, but in fact to be the most relevant user of the output given by the system. A very close institutional coordination with SIB and Migration Department is

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required, but also with private sector organizations as well. This unit has to provide guidelines to all other institutions, and to other BTB units, to have a permanent update of all strategic data.

Such analytical unit needs specialized human resources for statistical, economic and social analysis of tourism activities. A team of 5 people, with a technical profile, should be enough to assume institutional coordination and the processing of basic data to get a proper TSA. Quality standards for the statistical system will be defined by the compiling process of TSA, process that stresses data sources.

Academic Background	Profile	Main Assignments
Economics	Capabilities in both national accounts and balance of payments compilation	TSA compilation and coordination with Central Bank and SIB
Statistics	Capabilities in surveys field organization and data base processing	International Tourism Estimates and coordination with SIB and Migration Department
Statistics	Capabilities in household surveys field organization and inference estimates	Domestic Tourism and coordination with SIB
Statistics	Capabilities in surveys field organization and inference estimates	Characteristic Tourism Producers Estimates
Data Base Management	Capabilities in Data Base management	Create, manage and protect Data Bases

Technological Support

Tourism statistical system relies on records linked to entry and leaving dates, services and facilities used by visitors. Migration control points are so relevant to provide knowledge about visitor flows within the country, and surveys provide supplementary information on consumption habits and daily expenditures on tourism characteristic services. Opportunity is the challenge for most of this data to be processed and analyzed to give an actual support for decision makers.

Nowadays, technological equipment is available at quite lower prices, and multinational organizations are available for funding projects to increase information processing capabilities. Interamerican Developing Bank (IDB) is one of the institutions that would be available to provide funds for improving technological network in border control points and airports, and certainly to provide SIB with the technology to get surveys on-line. Many firms have increased their skills in surveys on-line in Central America, and it is possible to find support and training with them.

Visitors rely more and more on internet to explore tourism options, so globalization is part of daily reality for people planning holidays. Updating is an imperative for countries that want to be successful in promoting them as a destination when the competitiveness is wider than ten or five years ago.

Tourism Satellite Account Experiences in Latin America

Three country experiences are reviewed as a reference for setting up a first proposal for the institutional framework to be developed by Belize's authorities to undertake both the tourism statistical system and the tourism satellite account.

The experiences selected have considered countries that have a tourism activity which is quite relevant for their economy, but at the same time present some differences that are useful to describe institutional framework for basic data production and their analytical use.

The three countries selected are Ecuador, Argentina and Mexico.

Ecuador

Ecuador is member of the Andean Committee formed by country tourism authorities, which is in charge to develop a statistic system of tourism in member's countries: Bolivia, Colombia, Ecuador and Peru.

Since 2009, Ecuador is working on reactivate the implementation of its Tourism Satellite Account. In addition, it has developed a National Tourism Marketing Plan, which defines the political and institutional guidelines to increase the tourism activity.

For this purpose, Ecuador has worked out a statistics frame of publications. A bulletin of Tourism Statistics is published. It contains data referring to inbound tourism, outbound and domestic, as well as economic indicators and tourism services. The data on entries and departures correspond to the data provided by the National Institute of Statistics and Censuses (INEC) and the National Directorate of Migration (DNM), which are based on data collection from the Andean Card TAM migration, which is a uniform immigration control document, relating to the movement of people, at the Andean Community countries.

Therefore, Ecuador has developed a National Tourism Marketing Plan, which defines the political and institutional guidelines to increase the tourism activity.

Statistics published:

- ▶ Monthly entries and departures from Ecuador 2006-2010.
- ▶ Monthly entries and departures from Ecuador 2006-2010 by regional areas.
- ▶ Monthly entries and departures from Ecuador 2006-2010 by country of nationality and destination.
- ▶ Evolution of outbound tourism market
- ▶ Travels and transport account, balance of payments account
- ▶ Tourism income compared with income from exports by type of main product

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Domestic Tourism Surveys

The tourism ministry designed a new module about this subject which was added to the employment and home survey:

Survey is applied every quarter since December 2009.

Coverage: National and urban regional (March, June, September), urban and rural (December).

The first results had a 92.49% national response rate.

Receptive and emissive tourism surveys

Surveys are mainly applied in airports and in main border land control points.

Argentina

Since 2004, the Argentinean Tourism Secretary (SECTUR) has worked on design and implementation the Strategic Federal Sustainable Tourism Plan (PFETS). Its objective is developing national tourism paying attention to competitiveness and sustainability from international tourism frame. This plan considers provides information to Argentinean Tourism Satellite Account.

The institutions involved in the PFETS are: Federal Investment Council, National Park Administration, Federal Tourism Administration and Argentinean Chamber of Tourism. The plan promotes a variety of tourism studies and yearly reports.

Studies published

- ▶ Tourism statistic yearbook International tourism
- ▶ Foreign entrance rank through Ezeiza airport
- ▶ Seasonal tourism report
- ▶ Tourism competitiveness report
- ▶ Currency exchange evolution report
- ▶ National economic Indicators report
- ▶ Yearly aerial international transport report
- ▶ Monthly aerial international transport report
- ▶ Hotel accommodation supply

Domestic Tourism Estimates Surveys

Hotel Occupancy Survey 2009

- Institutions: Argentinean Tourism Secretary and National Institute of Statistics and Census (INDEC).
- Objectives:
 1. Measure international tourism impact on hotel sector
 2. Describe tourism evolution, sector employment, supply and demand of its infrastructure.
 3. Describe how many foreign and notational tourists stayed on national hotels.

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- Principal variables: occupancy rooms rate, employment, other related services supply, resident and foreign tourists entrance, average stay length.
- Period through analysis: 2004, 2005, 2006, 2007, 2008 y 2009
- Sample: Hotels
- Periodicity: yearly

International Tourism Characterization

International Tourism Survey

- Institutions: Tourism ministry (MINTUR) and National Institute of Statistics and Census (INDEC).
- Objectives:
 1. Measure the numbers of visitors into the country and how much they spend (receptive tourism)
 2. Measure where and how long national tourism people travel to other countries.
- Principal variables: residence, amount of people travelling, length of stay, accommodation, travelling type (package holiday, other)
- Periodicity: monthly
- Period through analysis: 1996, 2001, 2004, 2005, 2006, 2007, 2008 y 2009
- Sample: 1. Aeropuerto Internacional de Ezeiza, 2. Aeropuerto Jorge Newbery, 3. Puerto de Buenos Aires, 4. Aeropuerto Internacional de Córdoba

Mexico

Mexico presents a developed institutional and legal frame to develop its Tourism Satellite Account. Its authorities have increased resources to recognize the tourism importance since 90`s. Mexico has built up a strong institutional frame through creation of different institutions:

National Information Statistic System of Tourism

General Direction of Information and Analysis

Reactivation of Statistic and Geography Information Technical Committee of Tourism

Design and development of Management Quality System under ISO 9001:2000 normative.

Improvement of communication and coordination of different statistic areas from city councils.

Integration of statistic and geographical data from different sources.

Statistics produced by SECTUR

A. Accommodation

Variables: (126): rooms available, rooms booked, rooms taken, average rooms, tourists arrival date, tourist per night, occupancy percentage, average stay.

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1. Source: Monitoring program of tourism services occupancy /Mexican system of tourism statistic information
Geographic Coverage: touristic centre.
Temporal Coverage: weekly and monthly
Diffusion: weekly
 2. Source: Hotel questionnaire program –Tourism State Information System
Geographic Coverage: touristic centre, federal entity
Temporal Coverage: monthly
Diffusion: monthly
- B. International tourism
1. Source: Tourists account balance of payment (Mexican Bank, BANXICO)
Coverage: National
Diffusion: Monthly
 2. Source: Receptive Tourism Survey (BANXICO)
Coverage: National
Diffusion: annual
- C. Transportation
1. Source: monthly report of cruise ship and passengers arrival (General Port Direction)
Geographic Coverage: Principal Mexican seaports
Temporal Coverage: Monthly
Diffusion: Monthly
 2. Source: Monthly report of federal and contract expressway use.
Geographic Coverage: Principal Mexican ports
Temporal Coverage: Monthly
Diffusion: Monthly
 3. Source: Monthly airport operation report
Geographic Coverage: Tourism centers
Temporal Coverage: Monthly
Diffusion: Monthly
- D. Recreational Services
1. Source: Monthly report of seaside resort visitors administrated by Mexican Social Security Institute (IMSS)
Geographic Coverage: National
Temporal Coverage: Monthly
Diffusion: Monthly
 2. Source: Monthly museum and national monuments visitors report
Geographic Coverage: Principal Mexican ports
Temporal Coverage: Monthly
Diffusion: Monthly
- E. Other
1. Statistic yearbook of buying and selling operations from timeshare resorts (Resort Condominiums International)
Geographic Coverage: Tourism centers
Temporal Coverage: annual

- Diffusion: annual
- 2. Statistic Yearbook of tourist activity from countries members of World Tourism Organization.
 - Coverage: Countries members
 - Diffusion: Yearly
- 3. National Income and Expenditure Household Survey: Tourism module (INEGI)
 - Geographic Coverage: National
 - Temporal Coverage: 1996
 - Diffusion: only one of its kind
- 4. National Employment and Economic Situation of Tourism Survey
 - Temporal Coverage: annual

3. Benchmark I: Regional Countries Tourism Funds and Arrival Fees

TOURISM&LEISURE
EUROPAXISCONSULTING

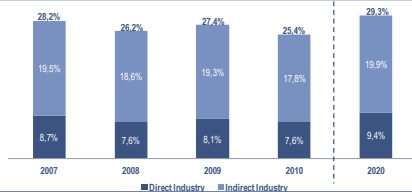
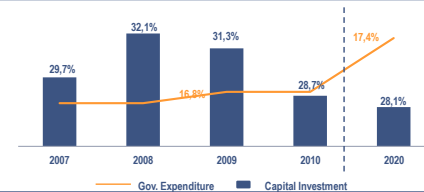
Benchmark I: Regional Countries Tourism Funds and Arrival Fees

Methodology

- ▶ The contribution made by Tourism to the GDP shows the importance of the industry in the direct and indirect sectors of the economies analyzed.
- ▶ The government expenditure illustrates the country's strategy of developing tourism as one of the economy's pillars.
- ▶ The travel and tourism industry's capital investment percentage underlines the public and private sector (service providers) willingness to invest in tourism facilities, capital equipment and infrastructure for visitors.
- ▶ The FDI shows the foreign investment flows and, hence, the willingness of foreign markets to invest in the local economy.

Jamaica tourism fund – TEF (I)



General Information on Jamaica's Foreign Tourism Investment																																												
Tourism contribution to the GDP	 <table border="1"><thead><tr><th>Year</th><th>Direct Industry (%)</th><th>Indirect Industry (%)</th><th>Total (%)</th></tr></thead><tbody><tr><td>2007</td><td>8.7%</td><td>19.5%</td><td>28.2%</td></tr><tr><td>2008</td><td>7.6%</td><td>18.6%</td><td>26.2%</td></tr><tr><td>2009</td><td>8.1%</td><td>19.3%</td><td>27.4%</td></tr><tr><td>2010</td><td>7.6%</td><td>17.8%</td><td>25.4%</td></tr><tr><td>2020</td><td>9.4%</td><td>19.9%</td><td>29.3%</td></tr></tbody></table>	Year	Direct Industry (%)	Indirect Industry (%)	Total (%)	2007	8.7%	19.5%	28.2%	2008	7.6%	18.6%	26.2%	2009	8.1%	19.3%	27.4%	2010	7.6%	17.8%	25.4%	2020	9.4%	19.9%	29.3%	<div>Tourism as a strategy for the country's development (represented by amount of investment)</div>  <table border="1"><thead><tr><th>Year</th><th>Gov. Expenditure (%)</th><th>Capital Investment (%)</th></tr></thead><tbody><tr><td>2007</td><td>16.8%</td><td>29.7%</td></tr><tr><td>2008</td><td>16.8%</td><td>32.1%</td></tr><tr><td>2009</td><td>16.8%</td><td>31.3%</td></tr><tr><td>2010</td><td>16.8%</td><td>28.7%</td></tr><tr><td>2020</td><td>17.4%</td><td>28.1%</td></tr></tbody></table>	Year	Gov. Expenditure (%)	Capital Investment (%)	2007	16.8%	29.7%	2008	16.8%	32.1%	2009	16.8%	31.3%	2010	16.8%	28.7%	2020	17.4%	28.1%
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FDI inflows and stock	<div><div>▶ 2007: USD 867m</div><div>▶ Stock 2007: USD 8,667m</div><div>▶ 2008: USD 1,437m (% change over 2007: +65.7%)</div><div>▶ Stock 2008: USD 10,104m</div><div>▶ 2009: USD 1,062m (% change over 2008: -26%)</div><div>▶ Stock 2009: USD 11,166m</div></div>																																											
Tourism incentives on foreign investment	<div><div>▶ Attraction Investment::</div><div>• Specific imported items are freed from general consumption tax</div><div>• Customs duty exemption for 5 years, and 5 year exemption from corporate taxes</div><div>▶ Resort Cottages Incentives:</div><div>• Income tax relief for up to 7 years</div><div>• Import duty concessions</div><div>▶ Hotel Incentives:</div><div>• Income tax relief for up to 10 years</div><div>• Import duty concessions for up to 10 years</div><div>• Import duty concessions for specific hotel accommodation styles (e.g. convention hotel) for up to 15 years</div></div>																																											
Information on Jamaica's Tourism Enhancement Fund (TEF) providing loans																																												
Description and funding sources	<div>The TEF is a mechanism (starting from May, 1st 2005) for the collecting of a fee to incoming airline passengers (USD 10) and cruise passengers (USD 2). These fees are placed into a dedicated fund to be used for the sole purpose of implementing the recommendations emanating from the National Tourism Master Plan.</div> <div><div>• The fees are collected by the International Air transport Association (IATA) to operating airlines. Flight charter handling companies and the local Port Authority are billed directly by the TEF.</div><div>• The fee applies to foreign passengers, excluding transit passengers and domestic travelers.</div><div>• Fee exemptions are provided to infants (under 2), diplomatic staff, airline crew on duty, transit/transfer passengers (24 hours)</div></div> <div>The TEF accrues US\$20 million a year through the collection of the incoming tourist fees</div>	<div>Investment</div> <div>▶ Project criteria:</div> <div><div>• Boost the country's economic prosperity</div><div>• Increase the competitiveness of tourism products</div><div>• Foster resort development</div><div>• Develop key sub-sectors such as, heritage and culture</div><div>• Protect the environment</div></div> <div>▶ And that can be classified into:</div> <div><div>• Heritage Tourism – Built and Natural</div><div>• Resort Enhancement (development, restoration)</div><div>• Community Tourism</div><div>• Sports and Entertainment</div><div>• Environmental Management</div><div>• Culture</div></div>																																										
Objectives	<div>To promote growth and development in the tourism sector by encouraging a better management of environmental resources in the island, enhance the overall tourist experience in the Island, and promoting for sustainable development of the tourism sector by means of a geographic allocation of funds—supporting national projects and small properties.</div>																																											
Administration	<div><div>▶ The TEF is an independent governmental body of the Ministry of Tourism.</div><div>▶ The TEF has a board comprising of thirteen (13) members appointed by the Minister of Tourism including governmental officials related to tourism and finance and local tourism associations (e.g. tourism attractions and hotel). Their aim is ensuring that the core objectives are carried out in accordance with the TEF Act.</div><div>▶ The Jamaica National Small Business Loan is a lending institution to which permanent residents of Jamaica have access to, in the realization of the objectives of the TEF Act.</div></div>																																											

Sources: WTTIC, UNCTAD, JAMPRO, Government of Jamaica - Ministry of Tourism

Jamaica tourism fund – TEF (II)



Information on Jamaica's Tourism Enhancement Fund			
Administration	<ul style="list-style-type: none"> ▶ Since its start date up to December 2010, the fund generated a total revenue of US\$ 90,7 million, approved 214 projects of which 152 already are complete and disbursed JM\$ 46,6 million. ▶ After almost 6 years (Dec. 2010) into its implementation, the TEF-Board is now discussing an increase of passenger fees from US\$10 to US\$ 20, since there is a need to increase the revenue flow of the fund to allow the TEF to more effectively carry out its mandate ▶ The TEF does not make any difference in the development/loan provision for public or private projects according to the TEF Act determining which types of projects are eligible for the fund. 		
Results - Private loans	<ul style="list-style-type: none"> ▶ Thirty percent (30%) of the loan proceeds may be used to assist the applicant in becoming tax compliant. ▶ The maximum loan is US\$ 35,000 and the funds are provided at an interest rate of 3% and a maximum term of five years. The smallest loan was US\$ 8,200. ▶ Loans of up to US\$ 11,700 million are available for ground transportation operators. ▶ 75% were able to refund their loans, 25% are delinquent. ▶ In 2004, a total fund of US\$ 2.4 million was devoted to improve the tourism product, and was especially aimed at small businesses in the sector. <ul style="list-style-type: none"> • US\$ 1.2 million were allocated to funding hotel properties • US\$ 600,000 to hurricane repairs • US\$ 600,000 million to tourism transportation operators 		
Results - Public loans	<p>TEF is also providing funds for the restoration of several heritage sites. However, the Tourism Enhancement Fund does not classify/or make a difference in regards to the entity requesting funding (public and private). Funding is available to those entities interested in participating in the Tourism Sector.</p> <p>Public sector projects can be unique projects or continuous. The next slide presents some of the TEF's continuous public projects.</p>		
Prerequisites:	<p>Private companies and public entities share the same prerequisite for application and must be:</p> <ul style="list-style-type: none"> • registered • provide a business plan and their expected expenses and area of expenses • meet specific safety requirements e.g. fire safety requirements • be tax compliant • A credit report from the present banker • have a reference from the Jamaica Hotel and Tourist Association or from the TEF 	Lessons learned	<ul style="list-style-type: none"> ▶ The Tourism Enhancement Fund (TEF) experiences troubles in fulfilling its core mandate to improve the tourist industry as the Ministry of Tourism and its tourism promotion's agency retrieves finance resources for Jamaica's marketing activities. ▶ Problems were occurring with the Port Authorities. Ever since the TEF launch, the port authorities did not forward the payment that was collected to the TEF. The port authority therefore still owes the TEF US\$ 10 million
		Conclusions	<ul style="list-style-type: none"> ▶ Improved strategies to ensure payments such as from the different sources and from the loan debtor. ▶ Strong policies and strategies to prevent corruption and unofficial projects

Sources: JNSBL, Government of Jamaica - Ministry of Tourism, TEF, Jamaica online news

Jamaica tourism fund – TEF (III)



Information on Jamaica's Tourism Enhancement Fund

Public annual projects	<p>▶ "Spruce Up Jamaica, Nice Up Yourself": The program is geared towards promoting performance excellence within Jamaica's tourism industry. The TEF was used to: Finance travelling and accommodation for the people involved in the program as well as other expenses; to Implement Communication plans, Purchase trophies/ prizes, ...</p> <p>▶ The 'Spruce Up Jamaica' project, launched by the Jamaican Tourism Minister is a six-week beautification program which ends right before the start of the high tourism season and aims at improving to the physical appearance of the islands' resorts. The activities of 'Spruce Up Jamaica' primarily consisted of the pruning of trees, cleanup of verges, bushing of sidewalks, painting of buildings, removal of derelict vehicles and other unsightly objects, and the creation and maintenance of street signage.</p>	<p>Project costs: 2009/2010 – US\$182,000 2008 – US\$ 107,220 Launch – US\$ 16,300</p>	<p>Disbursements: 2009/2010 – US\$ 93,900 2008 – US\$ 69,900 Launch – US\$ 16,150</p>
	<p>▶ Celebration of Independence: The celebrations showcase the best of Jamaica's culture in Kingston, St. James (Montego Bay) and St. Ann. Funding was used to backup the production and technical expenses incurred in the staging of the annual event e.g. the hiring of stage artistes, promotions and technical effects.</p>	<p>Project costs: 2010 – US\$ 233,000 2009 – US\$ 201,300 2008 – US\$ 233,000 2007 – US\$ 351,000</p>	<p>Disbursements: 2010 – US\$ 233,000 2009 – US\$ 201,300 2008 – US\$ 233,000 2007 – US\$ 351,000</p>
	<p>▶ Jazz and Blues Festival: The annual event aims to increase visitor arrivals, enhance visitor satisfaction and, on the whole, extend the profits generated by tourism to the domestic economy. TEF finances a fraction of the cost of hiring the artistes for the festival.</p>	<p>Project costs: 2010 – US\$ 500,000.00 2009 – US\$ 500,000.00</p>	<p>Disbursements: 2010 – US\$ 500,000.00 2009 – US\$ 500,000.00</p>
	<p>▶ Reggae Sunfest: The annual event seeks to present to the world a festival with the best state-of-the-art audio, lighting, overall stage presentation and top-billed performing artistes—thus to encourage tourist arrivals. TEF is instrumental in this mission by the undertaking a portion of the cost of hiring these artistes.</p>	n.a.	n.a.
	<p>▶ International Coastal Clean up Day: The project is geared towards the enhancement of the tourism product and shall stimulate a sense of pride and respect for the environment through voluntary cleaning of selected beaches around Jamaica. TEF provided funds to facilitate the Jamaica Environment Trust in: Conducting beach cleanups at 50 sites in Jamaica; Collect and record data on the types and quantity of debris removed from the coastline and beaches; Increase environmental awareness on solid waste issues; Some of the expenses incurred include transportation, training of volunteers, rental of equipment, etc.</p>	<p>Project costs: 2010 – US\$ 25,670 2009 – US\$ 18,750 2008 – US\$ 17,580</p>	<p>Disbursements: 2010 – US\$ 22,572 2009 – US\$ 15,850 2008 – US\$ 9,860</p>
	<p>▶ National Best Community Competition: The annual event aims to promote community involvement and, by extension, community-based tourism through the encouragement of community development committees to create sustainable development within their community. Funds are used to finance prizes for the competition; the categories include: the award to the most beautiful community, best community spirit and self reliance, best community facilities, best youth development, best heritage and cultural program and best-kept educational program.</p>	<p>Project costs: 2010 – US\$ 63,140 2009 – US\$ 54,242 2008 – US\$ 35,500</p>	<p>Disbursements: 2010 – US\$ 63,140 2009 – US\$ 52,742 2008 – US\$ 35,500</p>

Sources: Ministry of Tourism, TEF

Brazil's tourism fund - FUNGETUR



Information on Brazil's FUNGETUR (Fundo Geral do Turismo)			
Description	The credit institute CAIXA, is the main credit agency from federal government and therefore a 100% public institution. Since its creation, CAIXA has established close relations with the population and with different industry sectors. CAIXA created a specific tourism program, namely FUNGETUR (the General Fund for Tourism) which was created and enforced on October 27th, 1971. It is a loan mechanism for promoting business and tourism as a strategy for: social and economic development, generating employment and income, social inclusion and an improved quality of life. Since its existence, FUNGETUR is an important tool, financing today's tourist infrastructure operated by		
Objectives	<ul style="list-style-type: none"> Provision of credit for the implementation, improvement, maintenance and conservation of Brazilian tourism, ventures. It is therefore a source of resources for boosting Brazil's tourism industry FUNGETUR is designed to finance the expansion, modernization and reformation of tourism ventures as diverse as: hotels, inns, convention centers, theme parks, etc. 		
Administration	In order to apply for the FUNGETUR's loans, the following steps must be undertaken: <ol style="list-style-type: none"> Provide the required documentation. The applicant must go to the loan institute, submit the required paperwork and undergo cadastral analysis. With the approval of the cadastral analysis, the loan institute decides upon the project's feasibility and framework. The client signs the contract for receiving the loan and awaits for the land to be provided. 		
Results – Private credits/loans	Budget 2007 USD\$ 25.9 millions of which 57% were spend for projects and 43% for delinquent project payments of 2006 Budget 2009: USD\$ 26.2 millions of which 50% were spend for projects and 50% for remaining payments on 2008 projects.		
Pre-requisites	<ul style="list-style-type: none"> The FUNGETUR loans are only available for a company operating in the tourism sector which a revenue history lasting for at least 36 consecutive months. OR: A leading entity with interest in expanding, modernizing and reforming tourism enterprises. 		
Loan regulations	<ul style="list-style-type: none"> Loan ceiling: from BRL \$ 400,000 to BRL \$ 10 millions per business group. (The credit institute only finances up to 80% of the fix investments). Grace period: between 90 days and 60 months. Refunding shall be made monthly up to 240 months. Interest rates: 6.9% p.a. for 12 year contracts; 7.9% pa for +12 year contracts. Warranties required: A real guarantee of at least 130% of the value of the financing operation. 		
		Funding and Investment	Funding of FUNGETUR: <ul style="list-style-type: none"> contributions, donations, grants and aid agencies of all kinds, including international organizations; repayment of loans to receive dividends or the sale of equity holdings of the Fund itself and from Embratur (Institute for Tourism Brasil) results of investments in government securities/collaterals; all other deposits to a current credit; financial annual surplus from financial instruments Investment of FUNGETUR: The fund's resources are only applicable to tourism related businesses and provides: <ul style="list-style-type: none"> Funding for studies and projects; Financing of fixed capital and Loans to public agencies for their projects, works and services
		Lessons learned	<ul style="list-style-type: none"> Various funds can be led by the same governmental entity providing different sources of financing for different sectors of the national economy. However, this fund does not structure or canalizes the national tourism investments to follow the development of specific tourism strategies/tourism products. Result: Brazil's tourism investment and development remains uncontrolled and spontaneous.

Sources: WTTC, UNCTAD, JAMPRO, Government of Jamaica - Ministry of Tourism

Colombia's tourism fund – Tourism Promotion Fund (I)



Information on Colombia's Tourism Promotion Fund (I)									
Description and Funding sources	<p>The Tourism Promotion Fund (implemented in 1996, amended in 2006) is a mechanism for public - private partnership, which was brought together by contributions made by Government and private sector, aimed at increasing domestic and incoming tourism flows.</p> <p>The fund manages fiscal and parafiscal resources, namely the tourism tax, donations, revenues from commercial activities and the total amount of fines imposed on tourism service providers., and handles those resources separately.</p> <p>Fiscal resources are resources assigned from the Government and the Ministry of Tourism such as the tourism airfare/ticket tax and will be utilized for the promotions projects submitted by the regional entities into the Bank of Projects.</p> <p>Parafiscal resources are mandatory payments undertaken by the local tourism companies (four times a year) calculated upon the contributors' net revenues. In addition to these mandatory payments further parafiscal resources are fines, donations, subventions, sponsoring, commercial activities of public entities, ect.</p>								
Objectives	<p>These resources are allocated to the implementation of plans for tourism promotion and marketing and to strengthen and improve the competitiveness of the sector, in order to increase inbound tourism and domestic tourism in accordance with the strategies of the "Tourism Policy" defined Ministry of Commerce, Industry and Tourism.</p>								
Administration	<ul style="list-style-type: none"> Depending on the entity submitting the project, the fiscal or non-fiscal or both resources can be accessed. However, the only entities eligible to access the fund are the Ministry of Tourism, Proexport, national or regional promotional entities, parafiscal contributors, private tourism industry associations The tourism tax is applied to airfares on flights arriving in Colombia. Collected tax: 2006-2008: USD 5 per ticket to Colombia, 2009 – 2011: USD 10, starting with 2012 with USD 15. 								
Results	<table border="0"> <tr> <td>Parafiscal Resources:</td><td>Approved grants and projects for parafiscal resources items</td></tr> <tr> <td>2006: US\$ 2,1 million</td><td>2007: 48 from 60 applied projects: US\$ 1,2 million</td></tr> <tr> <td>2007: US\$ 7,8 million</td><td>2008: 147 from 421 applied projects: US\$ 13 million</td></tr> <tr> <td>2008: US\$ 9,5 million</td><td>2009: 176 from 404 applied projects: US\$ 20,1 million</td></tr> </table>	Parafiscal Resources:	Approved grants and projects for parafiscal resources items	2006: US\$ 2,1 million	2007: 48 from 60 applied projects: US\$ 1,2 million	2007: US\$ 7,8 million	2008: 147 from 421 applied projects: US\$ 13 million	2008: US\$ 9,5 million	2009: 176 from 404 applied projects: US\$ 20,1 million
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2007: US\$ 7,8 million	2008: 147 from 421 applied projects: US\$ 13 million								
2008: US\$ 9,5 million	2009: 176 from 404 applied projects: US\$ 20,1 million								
Investment	<p>The fund is devoted to tourism development—strategies and projects to:</p> <ul style="list-style-type: none"> Improve tourism competitiveness <ul style="list-style-type: none"> Improve the tourism offer (Develop new projects, e.g. improve tourism infrastructure such as Convention Centers, Tourism planning, e.g. technical assistance for land planning and land use; Enhance the destination's quality, e.g. supporting the development of technical standards for destinations by product: e.g. Ecotourism, Sun & Beach, etc.); Tourism security: projects to enhance the tourists safety on a national and state-level; Education, Capacity Building and tourism awareness such as: public awareness campaigns, sex-tourism prevention campaigns, etc. Improve the tourism business climate, such as the development of quality certification programs, etc. Research, Innovation and technical development, such as the development of indicators measuring the participation, development and capacity building Strengthening of the marketing and promotional activities <ul style="list-style-type: none"> Marketing and Promotion activities on the domestic and international market Tourist Information Market surveys/analysis Development of a Project Bank for promotional activities for state entities Participation of governmental institution in promotional activities (e.g international tourism fairs) 								

Sources: Fondo de Promoción turística

Colombia's tourism fund – Tourism Promotion Fund (II)



Information on Colombia's Tourism Promotion Fund (II)			
Results - Public grants	Projects submitted to be financed by the fund: Max 70% of the project is co-financed by the fund Projects submitted for the Bank for projects by regional entities: Max. 50% of the project is co-financed by the fund The granted money will be disbursed at latest three months after finalizing the project.		
Prerequisites and project evaluations:	<ul style="list-style-type: none">▶ The minimum requirements to be met in the submission of projects are: Territorial entities in which projects are to be developed must be tourism-oriented, and must therefore necessarily include tourism as an integral part in land use planning, development planning, tourism sector plan and in their budget. Having subscribed to a tourism competitiveness collective agreement, or being in the position to sign one within 4 months. Having fulfilled the share of commitment, as signed in the collective competitiveness agreement. Having met the requirements set in the consolidation process of the destination, in compliance with the territorial development plan.▶ Further prerequisites are imposed to parafiscal taxation paying entities.▶ The project's evaluation process consists of two stages: 1) analysis of eligibility and 2) feasibility analysis. Each stage is subdivided and, prior to approval, rates these subdivisions according to criteria taking into account the concept, the technical proposal, the impact and relevance.		
Lessons learned	<ul style="list-style-type: none">▶ Regulation on the entities entitled to apply for projects is crucial▶ Grants are only provided after the finalization of the project in order to ensure the most appropriate allocation of financial resources▶ Requires concrete documentation on which projects should be co-financed with which percentage, 30% - 100% in order to reduce corruption and to defend the board's decisions.		
Viable Project 2011			
Public projects	▶ Participation of Colombia in the Folklore Festival in Washington	Projects is worth: COL \$ 1,377,000,000	Approved COL \$ 497,000,000
	▶ Participation in the JATA World travel Fair, Japan	Project is worth: US\$ 80,000	Approved: US\$ 80,000
	▶ Promotion material for the Municipality of Concordia including video and booklets	Project is worth: COL\$ 6,600,000	Approved COL\$ 3.300.000
	▶ Development of the Adventure Tourism network	Project is worth: COL\$ 190,350,000	Approved: COL\$ 190,350,000

Sources: Fondo de Promoción turística

Mexico's tourism fund - FONATUR



Information on Mexico's FONATUR			
History	<ul style="list-style-type: none"> The origins of FONATUR date back from the late 1960s, as a response to the spontaneous and uncontrolled tourism development of Mexico, which was causing strong negative social, economic and environmental impact. FONATUR started operations in 1973 and over the last 38 years has created destinations (called Integrated Planned Resort)—namely Cancun, Los Cabos, Ixtapa, Loreto and Huatulco—by investing in Destinations' Master Plans, urban-resort planning mechanisms and coordinating the annual construction program of each destination. The operation started with a team of planners searching for the most appropriate destinations to be developed (according to different criteria such as: general interest, social, environmental and economical feasibility). In addition, land availability had to be enough to ensure the development of basic and specific tourism infrastructure capable of accommodating large volumes of visitor traffic and providing sufficient possibilities of air and road infrastructure to ensure easy access from source markets to the destinations. 		
Description	<ul style="list-style-type: none"> FONATUR's main activity is the sale of property use rights of plots located in planned tourism destinations. FONATUR is the institution responsible for the planning and development of sustainable tourism projects of domestic impact and is an instrument of promotion for investment and training of the tourism sector. FONATUR searches investors of land plots at tourism destinations. FONATUR designs tourism centers (master plans) with a comprehensive far-reaching vision, for the creation of an identity for each destination that will strengthen their image and will ensure private (domestic and foreign) investment. The master plan concerns hotel, commercial and residential areas; business centers, international airport, highways, wastewater treatment plants, electricity, as well as telephone and drinkable water services, amongst others. 	Incentive	FONATUR offers 3 types of payments for land use rights: <ul style="list-style-type: none"> 30% in cash at the beginning, the remaining 70% can be paid in the first year free of interest or alternatively by financing the balance up to a maximum period of 8 years. 10% in cash at the beginning. Financing balances up to 8 years. Pay up in 12 months (free of interest)
Objectives	To collect public and private investments for the development of specific tourism destinations (integral development per destination) including hotels, roads, basic infrastructure, recreational facilities		FONATUR services/offering: <ul style="list-style-type: none"> Legal certainty Land with a variety of services offered in proximity Low interest rates between 1 – 5 years: <ul style="list-style-type: none"> E.g. Cancun, Los Cabos, Ixtapa and Nayarit with an interest rate of 4 % E.g. Loreto and Huatulco with an interest rate of 1.75%
Funding sources	<ul style="list-style-type: none"> Income generated from property right sales Interests of loans Return on capital and equities investments FONATUR – Constructora (an entity of FONATUR) generates income through the construction of infrastructure and superstructures such as: shopping malls, golf courses. Loans from: World Bank, Inter-American Development Bank, Banobras Technical assistance: evaluation and qualification of investment projects, assistance to the private and public sector 	Results	
Lessons learned	<ul style="list-style-type: none"> Need for anti-corruption mechanisms to enhance transparency and integrity Constant revision if all project target the main scope, namely the development of the local tourism sector. Large tourist destinations affect heavily the ecosystems Integrate mechanisms that do not only promote written guidelines, but that really puts them into practice, (Sustainable impact assessment) In order to identify the destination's tourist capacity, negotiations are required between three parties: organizing institution, developers/investors/hotels and the international airline companies. 		
Conclusions	<ul style="list-style-type: none"> Fideicomiso (bank trust) - FONATUR does not sell the property rights. However, the investor acquires the land use rights and can therefore administrate the plot and has to hand it back to FONATUR after a specific period of time 		

Sources: WTTC, UNCTAD, JAMPRO, Government of Jamaica - Ministry of Tourism

FONATUR is the sole loan institute. Its primary business is not the granting of credits, but rather, the development of tourism destinations by means of searching potential investment projects

				
Service structure	<ul style="list-style-type: none"> TEF only provides loans to projects that support the development of specific tourism products - Public and private projects are eligible 	<ul style="list-style-type: none"> FONATUR structures the destination in plots already containing specific future functions and provides payment schemes - Public and private projects are eligible 	<ul style="list-style-type: none"> FUNGETUR only provides credits/loans for tourism projects – Public and private projects are eligible 	<ul style="list-style-type: none"> Colombia's TPF provides grants to co-finance specific projects and selects the most accurate, eligible and feasible projects – Only public projects are eligible
Target segment	<ul style="list-style-type: none"> Domestic 	<ul style="list-style-type: none"> Domestic and International 	<ul style="list-style-type: none"> Domestic 	<ul style="list-style-type: none"> Domestic (public entities)
Core business	<ul style="list-style-type: none"> Loan institute for small businesses with loans of max US\$ 35,000 for the development of specific tourism products, resort development and sustainable prosperity (economic and environmental) 	<ul style="list-style-type: none"> Development of tourism destination Master Plans FONATUR is the promotion agency devoted to the selling of plots and the search for investors 	<ul style="list-style-type: none"> Loan institute for small businesses with a loan ceiling US\$ 6 million for existing tourism companies and entities interesting in expanding, modernizing and reforming tourism enterprises 	<ul style="list-style-type: none"> Development of projects for: <ul style="list-style-type: none"> Enhancing Colombia's marketing and promotional activities, Specific tourism products, and Enhancing tourism security
Funding sources	<ul style="list-style-type: none"> Incoming air and cruise tourist arrival fee Interests on loans 	<ul style="list-style-type: none"> Sales of land.use rights Interests on loans Return on investment (financial instruments, dividends) Multilateral loans 	<ul style="list-style-type: none"> Contributions, donations, grants Interests on loans Return on investment (financial instruments, dividends) Etc. 	<ul style="list-style-type: none"> Revenues from tourism levies and fees on air passengers Payments from the private sector tourism industry Donations, revenues from commercial activities Fines from tourist service providers
Institution involved	<ul style="list-style-type: none"> TEF board (governmental and private members) is the official body of the Ministry of Tourism in charge of organizing the TEF. Jamaica National Small Business Loan is the entity in charge of providing assistance and pre-selecting projects to applicants. All three entities approve projects 	<ul style="list-style-type: none"> FONATUR is under the Ministry of Tourism. The technical committee consists of representatives of the following entities: <ul style="list-style-type: none"> Ministry of Tourism Ministry of Finance and Public Loans Ministry of Social Development Banco de Mexico 	<ul style="list-style-type: none"> CAIXA is the federal governmental bank of Brazil (100% public institution) providing credits/loans and incentives for different sectors 	<ul style="list-style-type: none"> The Ministry of Tourism is in charge of the fund and the project evaluation and approval.

Conclusions of the tourism funds (I)








- ▶ **The entity in charge of the fund's distribution can be:**
 - A department of the Ministry of Tourism
 - An independent and official body of the Ministry of Tourism
 - A body under the Government or Ministry of Tourism outsourcing the task to a loan institute
 - The main loan institute/agent of the government (hence a 100% public institution/bank)
- ▶ **Service structure:**
 - The fund can provide loans, credits and/or attractive interest rate incentives for domestic or foreign tourism companies
 - The fund can provide grants for the public sector entities in for projects relating to tourism marketing, promotion activities and infrastructure enhancement
 - Can develop destination master plans with its required facilities
 - Searches for investors according to the destinations needs/plans
- ▶ **Funding projects can aim at:**
 - The development of specific tourism products,
 - Resort Enhancement
 - Sustainable prosperity
 - Integral and planned development of tourism destinations
 - Leading entities with interest in expanding, modernizing and reforming local tourism enterprises
 - The creation of local small and medium-sized tourism ventures
 - Improving the tourism competitiveness (improving the tourism offer, capacity building and trainings, enhance the local business climate, research, innovation and technical development)
 - Strengthening marketing and promotional activities on domestic and international markets (market surveys, tourism information, participation in tourism fairs, FAM trips, etc.)

Conclusions of the tourism funds (II)

► Funding sources for projects:

- Revenues from tourism fees/levies on incoming tourists (charged by IATA on the value of each air ticket, port authority for each cruise passenger)
- Revenues from plot sales or lease
- Multilateral loans from the World Bank, IADB, etc.
- Contributions, donations, grants and aid agencies of all kinds—including support from international organizations;
- Repayment of loans and interests on loans
- Dividends or the sale of equity holdings of the fund
- Technical assistance: evaluation and qualification of investment projects, assistance to the private and public sector
- Financial annual surpluses from financial instruments
- Payments of the local private sector tourism industry calculated upon the industries' net revenues (Tourism development tax for tourism operators)
- Revenues from sponsorships and commercial promotional activities from the main tourism promotion organization
- Fines imposed on tourism service providers
- Return on investments of government securities

Regional Countries Tourism arrival fees contributing to tourism development

							
	Jamaica	Columbia	Costa rica	Dominican republic	Nicaragua	Panama	Ecuador
Fee types	<ul style="list-style-type: none"> ▶ Incoming air and cruise arrival fees 	<ul style="list-style-type: none"> ▶ Revenues from tourism levies and fees on air passengers 	<ul style="list-style-type: none"> ▶ Fee on plane tickets and daily hotel rate 	<ul style="list-style-type: none"> ▶ Incoming and out coming air passenger fee ▶ Tourist card fee 	<ul style="list-style-type: none"> ▶ Tourist card fee 	<ul style="list-style-type: none"> ▶ Tourist card fee 	<ul style="list-style-type: none"> ▶ Tax on plane tickets to go in and out of the country
Price	<ul style="list-style-type: none"> ▶ Cruise passenger : USD2 ▶ Air passenger: USD 10 	<ul style="list-style-type: none"> ▶ Air passenger: USD10 	<ul style="list-style-type: none"> ▶ Air passenger USD15 	<ul style="list-style-type: none"> ▶ USD5 per air passenger coming in and out of the country ▶ USD10 per tourist coming in the country 	<ul style="list-style-type: none"> ▶ Tourist card at USD10 per person 	<ul style="list-style-type: none"> ▶ Tourist card at USD10 per person 	<ul style="list-style-type: none"> ▶ USD5 per flight going in or out of the country
Use of the revenue	<ul style="list-style-type: none"> ▶ The tax finances public and private project in the tourism domain 	<ul style="list-style-type: none"> ▶ The tax is used to improve tourism competitiveness and strengthening the marketing and promotional activities 	<ul style="list-style-type: none"> ▶ The revenue of the tax is used in advertising, radio and television in Costa Rica and in the world 	<ul style="list-style-type: none"> ▶ The air passenger fee finances the upgrade of the infrastructures as well as the touristic offer in Puerto Plata, Samana, Cabarete, Las Terrenas, Punta Cana y Huan Dolio 	<ul style="list-style-type: none"> ▶ USD5 of each tourist card are collected by INTUR to fund tourism projects 	<ul style="list-style-type: none"> ▶ The entire revenue is integrated to the tourism ministry budget 	<ul style="list-style-type: none"> ▶ This tax finances the promotion fund of tourism

WTTC, UNCTAD, JAMPRO,
Government of Jamaica -
Ministry of Tourism

Fondo de promoción
turística

<http://thecostaricanews.com>




<http://sectur.gob.do/>

<http://www.intur.gob.ni/>

<http://www.atp.gob.pa>

<http://www.turismo.gob.ec>

Regional Countries Tourism arrival fees for the embassy

			
	Salvador	Guatemala	Cuba
Fee types	<ul style="list-style-type: none"> ▶ Tourist card fee 	<ul style="list-style-type: none"> ▶ Tourist card fee 	<ul style="list-style-type: none"> ▶ Tourist card fee
Price	<ul style="list-style-type: none"> ▶ Tourist card at USD10 per person 	<ul style="list-style-type: none"> ▶ Tourist card at USD5 per person 	<ul style="list-style-type: none"> ▶ Tourist card at USD 24 per person
Use of the revenue	<ul style="list-style-type: none"> ▶ El Salvador is not using this fee for tourism development or promotion ▶ Embassy 	<ul style="list-style-type: none"> ▶ Embassy 	<ul style="list-style-type: none"> ▶ Embassy

4. Benchmark II: Regional Countries Investment Profiles

TOURISM&LEISURE
EUROPRAXIS CONSULTING

Benchmark II: Regional Countries Investment Profiles

Foreign Tourism Investment Profile - Brazil



General Information on Brazil's Foreign Tourism Investment

Tourism contribution to the GDP1	<p>Tourism as strategy for the country's development (represented by amount of investment)</p>	
FDI inflows	<p> ▶ 2007: USD 34,585mm ▶ Stock 2007: USD 309,668mm ▶ 2008: USD 45,058mm (% change over 2007: +30%) ▶ Stock 2008: USD 287,697mm ▶ 2009: USD 25,949mm (% change over 2008: -43%) ▶ Stock 2009: USD 400,808mm </p>	
General incentives on foreign investment	<p> ▶ Micro and small size enterprises under the law of Brazil, headquartered and managed in Brazil are offered favored taxations, legal procedures providing a simplified and unified method for tax payments at favored and progressive rates to be levied exclusively on the company's gross income. ▶ Among the incentives offered by the Brazilian Government are Public-Private Partnerships, support mechanisms and investment incentives such as exemption from taxes for a specific period of time, subsidized credit from governmental development banks, and the ability to import capital goods duty-free, or at sharply reduced tariff rates. ▶ Furthermore, there are a variety of sector related and regional foreign investment incentives. In this respect, investors can rely on support from investments promotions offices and regional partners specialized in assisting foreign investors in Brazil. ▶ Currently, there are no existing incentives specially dedicated to the tourism sector. </p>	
Investment institution and task	<p>Renai aims to:</p> <ul style="list-style-type: none"> • Provide the necessary information investors need in their business decision-making process; • Promote and facilitate the investment process; and • Stimulate and aid Federal and state Departments to support foreign investments. 	<p>General information</p> <ul style="list-style-type: none"> ▶ Brazil's restrictions on foreign equity ownership are above average among the countries in the Latin America and the Caribbean ▶ Brazil does not have a principal law governing foreign investment. It is subject to various federal laws and Central Bank of Brazil, which forms the regulatory framework for governing foreign investment. There are no restrictions on foreigners buying land and commercial buildings, except at the country's borders. ▶ Foreign investment in Brazil is characterized by the following: <ul style="list-style-type: none"> - Foreign investments can be freely carried out through subsidiaries or joint ventures, - They do not require prior authorization - There is a level playing field for domestic and foreign capital. - There are no restrictions on capital repatriation and remittance of interest and dividends abroad. ▶ Tax reductions are granted to companies who set up in economically disadvantaged regions
Services offered by RENAI	<ul style="list-style-type: none"> • Maintenance of a website that provides an extensive data bank of announced investment projects and investment opportunities across Brazil. • Organizing workshops and seminars, and • Providing support for potential investors. 	
Procedures	<ul style="list-style-type: none"> • With a total of 17 procedures taking 166 days, the process of establishing a foreign-owned subsidiary that wants to engage in international trade takes longer than in to other countries in the Latin American / Caribbean region. • To be eligible for incentives, a company must submit a project, including following information: company name, legal representatives, billings, number of employees, projects to be developed, the manufacturing process of eligible products, quality-control program, and profit-sharing program for employees. Applicants must also provide certificates of regularity issued by the federal tax authorities and a certificate of regularity with the Brazilian Time of Service Guarantee Fund. 	

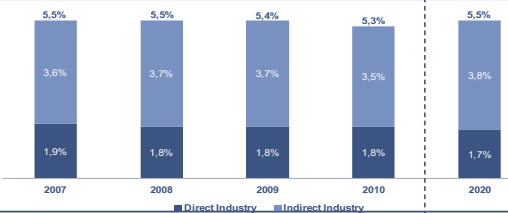
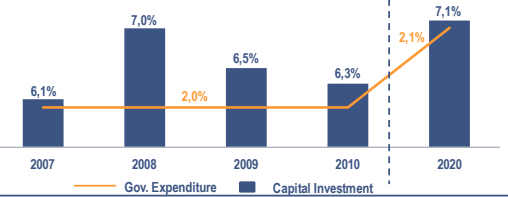
Sources: WTTC, UNCTAD, The World Bank Group, RENAI, ICEX

Foreign Tourism Investment Profile - Colombia



TOURISM, FOREIGN INVESTMENT AND EXPORT PROMOTION
OFFICIAL INVESTMENT PORTAL

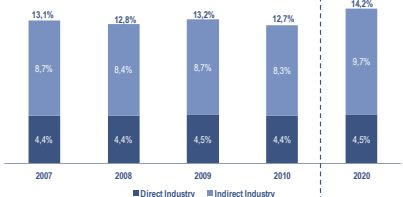
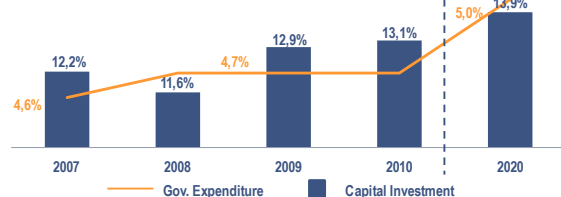
General Information on Colombia's Foreign Tourism Investment

<p>Tourism contribution to the GDP</p>		<p>Tourism as strategy for the country's development (represented by amount of investment)</p>	
<p>FDI inflows and stock</p>	<p> ▶ 2007: USD 9,049mm ▶ Stock 2007: USD 56,448mm ▶ 2008: USD 10,583mm (% change over 2007: +16.9%) ▶ Stock 2008: USD 67,273mm ▶ 2009: USD 7,201mm (% change over 2008: -32%) ▶ Stock 2009: USD 74,092mm </p>		
<p>Tourism specific incentives (product development, specific issues)</p>	<p> ▶ Hotel and Ecotourism incentives such as income tax exemption (0%) for a determined period of time are provided to: <ul style="list-style-type: none"> • New hotel constructions (30 years) • Existing hotel remodelling and (30 years) • Ecotourism services (20 years) ▶ Legal stability contracts guaranteeing investors that if legislation is approved during the life of the contract, affecting any of the rules that by prior agreement have been identified as "determining factors for investment," they will be allowed to continue to operate under the previous regulation, during the term of the agreement. </p> <p> ▶ Tax deductions on capital goods used for exports of tourism ▶ Single Enterprise Free Trade Zone Services (provided to companies fulfilling following requirements: Investment USD 2.5 million – 11.4 million and 500 direct jobs; Investment USD 11.4 million – 22.9 million and 350 direct jobs; Investment more than USD 22.9 million and 150 direct jobs) <ul style="list-style-type: none"> • Flat rate income tax of 15%. • There is an exemption of VAT on tourist services in Colombia to non-residents through packages sold in Colombia or outside agencies, operators and hotels registered with the National Register of tourism in Colombia. • Foreign visitors can request a refund of 100% VAT on specific products ▶ Deduction of 30% of the value of actual investments made only in real assets. </p>		
<p>Investment institution</p>	<p>ProExport is responsible for the commercial promotion of nontraditional exports, international tourism and foreign investment in Colombia. It acts through a national and international office network.</p>		
<p>Services offered by Proexport</p>	<ul style="list-style-type: none"> • Requests for information (economic, legal, procedural or a sector specific, etc.). • Contacts with the public and private sector. • Agenda organizing when investors decide to visit Colombia. • Care Services for investors already established in the country. • Evaluation and improvement of business climate. 	<p>Incentives Application Procedure</p>	<ul style="list-style-type: none"> ▶ Procedure to undertake for a FTZ: evaluation by the Ministry of Tourism (duration approximately 3 months) followed by a presentation and advocacy of the Business Plan to the Ministry of Tourism, other Ministries and the tax department (forming a committee meeting once a month to evaluate the projects). There are no payments requested for this procedure, sole costs are the companies lawyers which assist the application procedure. ▶ Other FTZ arrangements are offered for permanent FTZ, Single Enterprise in Agribusiness, for various regional departments and for port companies. ▶ For other incentives, no evaluation of incentives is undertaken, hence no payments are required.
<p>General information</p>	<p>There are a total of 13 procedures taking 27 days in the process of setting up a foreign-owned subsidiary that wants to engage in international trade. Among the 14 countries in Latin America and the Caribbean covered by the Investing Across Sectors indicators, Colombia is one of the most open economies to foreign equity ownership.</p>		

Sources: WTT, UNCTAD, The World Bank Group, Proexport, ICEX

Foreign Tourism Investment Profile - Mexico



General Information on Mexico's Foreign Tourism Investment																																														
Tourism contribution to the GDP	 <table border="1"><thead><tr><th>Year</th><th>Direct Industry</th><th>Indirect Industry</th><th>Total</th></tr></thead><tbody><tr><td>2007</td><td>4.4%</td><td>8.7%</td><td>13.1%</td></tr><tr><td>2008</td><td>4.4%</td><td>8.4%</td><td>12.8%</td></tr><tr><td>2009</td><td>4.5%</td><td>8.7%</td><td>13.2%</td></tr><tr><td>2010</td><td>4.4%</td><td>8.3%</td><td>12.7%</td></tr><tr><td>2020</td><td>4.5%</td><td>9.7%</td><td>14.2%</td></tr></tbody></table>		Year	Direct Industry	Indirect Industry	Total	2007	4.4%	8.7%	13.1%	2008	4.4%	8.4%	12.8%	2009	4.5%	8.7%	13.2%	2010	4.4%	8.3%	12.7%	2020	4.5%	9.7%	14.2%	Tourism as strategy for the country's development (represented by amount of investment)	 <table border="1"><thead><tr><th>Year</th><th>Gov. Expenditure</th><th>Capital Investment</th></tr></thead><tbody><tr><td>2007</td><td>4.6%</td><td>12.2%</td></tr><tr><td>2008</td><td>11.6%</td><td>11.6%</td></tr><tr><td>2009</td><td>4.7%</td><td>12.9%</td></tr><tr><td>2010</td><td>13.1%</td><td>13.1%</td></tr><tr><td>2020</td><td>5.0%</td><td>13.9%</td></tr></tbody></table>	Year	Gov. Expenditure	Capital Investment	2007	4.6%	12.2%	2008	11.6%	11.6%	2009	4.7%	12.9%	2010	13.1%	13.1%	2020	5.0%	13.9%
Year	Direct Industry	Indirect Industry	Total																																											
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2020	5.0%	13.9%																																												
FDI (foreign direct investment) inflows	<ul style="list-style-type: none">▶ 2007: USD 27,440mm▶ Stock 2007: USD 273,831mm▶ 2008: USD 23,683mm (% change over 2007: -14%)▶ Stock 2008: USD 297,001mm▶ 2009: USD 12,522mm (% change over 2008: -47.2%)▶ Stock 2009: USD 309,523mm																																													
General incentives on foreign investment	<ul style="list-style-type: none">▶ Mexico does not offer specific incentives for the tourism sector. However, each state's government offers a specific bundle of the following incentives:▶ Temporary exemption from state taxes and fees, Income tax temporary exemption/reduction for new firms, Duty exemption from the Public Registry of Property and Commerce, Exemption from payment for Land Use Licenses, Exemption from payment for building permits, Tax Exemption for possession or use of used motor vehiclesExemption from drinking water connection and drainage, Reducing state taxes and fees, Reduction in the rights that are generated from the Public Registry of Property and Commerce, Reduced costs of real estate appraisal, Reduced property transfer tax, Tax reduction on registration and issuance of license plates, decals and vehicle registration certificate of state, Reduction in the rights that are generated in connection with the plan review, Income tax reduction for companies that create new jobs, Property Tax Reduction, Tax Relief for the acquisition of property, Reduction in the payment of licensing fees for construction, Reduction in the payment of connection fees for water supply and sewerage, Special incentives for research and technology development, Special incentives for projects outside urban areas, Temporary reduction of the right of public lighting																																													
Investment institution and tasks	ProMéxico promotes activities aimed at attracting foreign direct investment to support Federal Public Administration and the Federal States agencies in placing FDI in the country.			<div>General information</div> <ul style="list-style-type: none">▶ First coastal lines can not be purchased neither by foreigners nor by locals. Coastal line land slots are only possible to be leased (for foreigner investments of max. of 50 years = mechanism for safeguarding coastal lines)▶ Mexico's foreign equity ownership restrictions are stricter than the regional average. The Foreign Investment Law sets out a list of strategic sectors that are either closed to foreign capital participation or in which foreign ownership is limited.▶ The Mexican Government has created an open and safe environment for foreign investors. The recently undertaken economic policies should allow investors to manage the safety of their operations despite the unfavorable global external environment.▶ Public treasury funds have been made available to private companies that have been heavily affected by the crisis.																																										
Services offered by ProMexico	<ul style="list-style-type: none">• Scheduling interviews for investors in Mexico, Coordination of appointments, Logistics and organization of trips, Confirmation of meetings, Creation of an investor profile, Monitoring of investor satisfaction.																																													
Procedures	<ul style="list-style-type: none">• It takes 11 procedures and 31 days to establish a foreign-owned limited liability company (LLC) in Mexico (Mexico City).• The application procedure and incentives differ on the sector incentives, on the states incentives provided and on the volume of the investment and job amount it is generating.• ProMexico assists investors in obtaining the incentives. For this the investor has to fill out a questionnaire on its project's investment amount by industry sector, its targeted markets, direct and non-direct employees required by skills and the competing countries where the investor would be likely to undertake this project and the provided benefits/incentive packages offered by the competing countries.																																													

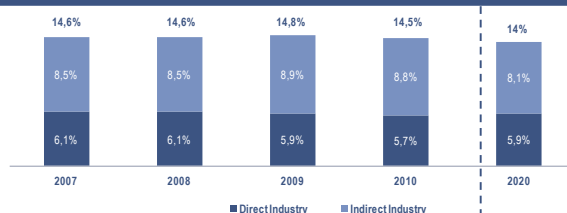
Sources: WTTC, UNCTAD, The World Bank Group, ProMexico, ICEX

Foreign Tourism Investment Profile – Costa Rica (I)

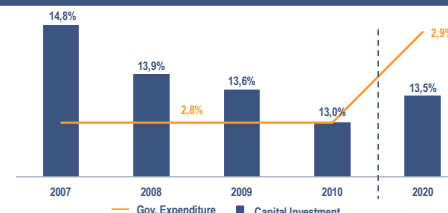


General Information on Costa Rica's Foreign Tourism Investment (I)

Tourism contribution to the GDP



Tourism as strategy for the country's development (represented by amount of investment)



FDI (foreign direct investment) inflows

- 2007: USD 1,896mm
- Stock 2007: USD 8,803mm
- 2008: USD 2,021mm (% change over 2007: +6.6%)
- Stock 2007: USD 10,818mm
- 2009: USD 1,323mm (% change over 2008: -34.5%)
- Stock 2007: USD 12,141mm

Tourism specific incentives (product development, specific issues)

- Hotel services**
 - Exemption from all taxes and surcharges applicable to the importing or local purchase of items necessary for the operation or installation of new and established companies that offer new services, as well as for the construction and design, expansion or renovation of the building.
 - Accelerated depreciation of assets
 - Granting municipal licenses within a maximum of 30 days
 - Exemption from land tax for up to 6 years
- Tourism transportation services by air**
 - Accelerated depreciation in accordance with the law on income tax
 - Fuel supply at competitive prices
 - Exemption from all taxes and surcharges for the importation or local purchase of spares for the functioning of aircrafts
- Transportation rental**
 - Exemption of 50% of the total amount obtained by applying the existing tax on imports of motor vehicles, designed exclusively for rental to tourists. Vehicles exempted by this law must be renewed every 3 years.
- Tourism transportation services by sea**
 - Exemption from all taxes and surcharges on the importation or local purchase of essential goods for the construction, expansion or remodeling of piers and other places open to the embarking or disembarking of tourists, as well as for construction and maintenance of marinas, spas and aquariums.
 - Accelerated depreciation in accordance with the law of income tax
 - Exoneration from all taxes and surcharges, except for customs duties on imports, whose price is set at 20%, the import or local purchase of watercraft.
- Incoming travel agencies**
 - Exemption from all taxes and surcharges, except for customs duties (5%) in the import of vehicles for public transport with a minimum capacity of 15 passengers

Sources: WTTC, UNCTAD, The World Bank Group, CINDE, ICEX

Foreign Tourism Investment Profile – Costa Rica (II)



General Information on Costa Rica's Foreign Tourism Investment (II)

Incentive-Application Procedure	<p>The committee of the Costa Rican Tourism Board (ICT) provides assistance to the investor and revises the documents before being submitted to the Board. (free of charge)</p> <ul style="list-style-type: none">▶ 1. evaluation (free of charge, duration: 1 month) – presentation of project and business plan. Business who received a “Tourism Declaration”, have access to non-fiscal incentives/development programs, technical assistance and promotion by the Costa Rican Tourism Board. (requirements, among others supply for a sworn affidavit assuring that the principal purpose of the investment will be tourism-related). In addition these business are then entitled to apply for a license to serve alcohol.▶ 2. evaluation (free of charge, duration: 1 month) – presentation of the construction plan and economic study and evaluation of the granted level of fiscal benefits.▶ 3. evaluation (free of charge, duration 8 days) -. Presentation of the intentions of required material, locally purchased products vs. Imported products, etc. <p>From this moment on, the fiscal and non-fiscal benefits are applied. Incentives do not vary on the evaluation rate, and are the same for each investor.</p> <p>These services are directed to private investors, hence only few public projects have applied for these incentives. The evaluation is undertaken by ICT and authorized by the Ministry of Economics and the Ministry of Finance and ICT.</p>		
Investment institution	CINDE is a public entity promoting foreign direct investment in Costa Rica.	General information	<ul style="list-style-type: none">▶ Costa Rican legislation provides for equal treatment of domestic and foreign investors with respect to ownership of local companies.▶ Most of the industry sectors are fully open to foreign equity ownership.
Services offered by CINDE	<ul style="list-style-type: none">• Investment promotion by sector; Development of international affairs• Research and investment Intelligence; Service to investors; Aftercare.		
Foreign Company	It takes 14 procedures and 63 days to establish a foreign-owned limited liability company (LLC) in Costa Rica (San Jose). This is shorter than the average for the region.		

Conclusions of Foreign Investment Profiles

- ▶ The attractiveness of investing in Brazil isn't based on the ease of undertaking foreign investment there, but rather on the country's current phase of expansion and economic boom, which are underlined by the high amounts of FDI. In addition, the country's appeal to international investors is due to different factors: a market of almost 200 million inhabitants; easy access to raw materials; and a diversified economy, therefore one less vulnerable to global crises. However, Brazil's strategy does not show a strong current or future emphasis on the tourism economy.
- ▶ Colombia is currently not focusing on the tourism industry; however, it has developed attractive tourism-specific incentives (including specific ecotourism incentives) and offers an open environment to foreign equity ownership. Its situation regarding the arbitration of commercial disputes and judicial order and assistance are also very important factors for establishing an investment-friendly climate.
- ▶ Costa Rica, a country focusing on the tourism economy as a main strategic national pillar, attracts and spends large sums in this industry. In addition to its investment incentives, it offers tourism specific fiscal and non-fiscal incentives aimed at different links in the tourism value-chain.
- ▶ Investment Promotion Agencies promote international FDI in home economies. Ideally, they offer:
 - A representative in important source markets,
 - Promotion of local investment projects and opportunities
 - Information to potential investors through organization of various distribution activities
 - Coordinated appointments between the parties (logistics and trip organization)
 - Accompanying the investor and providing interpretation assistance
 - Providing follow up services for already established investors
 - Monitoring, evaluation and improvement of the business climate and the investors' satisfaction
- ▶ Large countries such as Brazil and Mexico provide different incentive packages depending on the area of investment, as the bundling of incentive packages is regulated by each state government.
- ▶ The analysis showed that Brazil is not focusing on the tourism economy. Although Mexico has stricter foreign equity ownership restrictions than the regional average, it provides an open and safe environment for foreign investors to manage their operations.
- ▶ Although Mexico is focusing strongly on the travel and tourism economy it does not offer specific tourism incentives and imposes restrictions on foreign equity ownership.

Methodology

- ▶ The contribution made by Tourism to the GDP shows the importance of the industry in the direct and indirect sectors of the economies analyzed.
- ▶ The government expenditure illustrates the country's strategy of developing tourism as one of the economy's pillars.
- ▶ The travel and tourism industry's capital investment percentage underlines the public and private sector (service providers) willingness to invest in tourism facilities, capital equipment and infrastructure for visitors.
- ▶ The FDI shows the foreign investment flows and, hence, the willingness of foreign markets to invest in the local economy.

5. Benchmark III: Investor Opinion Survey and Comparative Analysis of Economic Freedom

TOURISM&LEISURE
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Benchmark III: Investor Opinion Survey and Comparative Analysis of Economic Freedom

Summary Investor Opinion Survey Results

Attractiveness of Belize

- ▶ Belize is not well known European Investors; North American investors are more knowledgeable about the country
- ▶ **General positive perception:** natural beauty, untapped tourism destination, natural continuation of Riviera Maya, great diving, interesting islands, good tourism potential, small & high end boutique destination, eco-destination, sun and sea.
- ▶ **General negative perception:** needs tourism development strategy, legal uncertainty, personal insecurity, drug trafficking, hurricane prone, very poor, meager infrastructure and support services., difficult to access.

Most important features sought after

- ▶ **The most important feature is legal security, uninterested if there is a high risk of expropriation**
- ▶ **Other important aspects:** personal security of guests, accessible international airport, access to competent human resources, good infrastructure and support services, enforcement of tourism regulations
- ▶ **Government incentives:** tax exemption for imported materials and equipment, able to hire foreign personnel, 30year corporate tax exception, investment in services infrastructure, co-financing of hospitality training center, investment in debt financing of banking institutions, 100% foreign ownership of land and assets and encouragement of joint ventures with local entities

Competitive regional destinations

- ▶ **Brazil and Colombia are examples of countries perceived as unsafe in the past that are now offer an attractive opportunity for foreign investors**
- ▶ Mexico and Costa Rica offer a consolidated tourism industry and are accessible destinations for investors
- ▶ Many want to continue expanding current investment in Mexico, Dominican Republic and Costa Rica
- ▶ Puerto Rico and Barbados are good examples of government debt financing of banking institutions

Profile of surveyed Investors

- ▶ Average regional investment activity: \$100.000- \$200.000 per room without land; \$20.000- \$30.000 cost of land per room; 80-120 rooms; 30-40 hectares with a min of 10hectares. **Expected IRR 15-20%.**
- ▶ **Ideal investment model for Belize: Mix development with hotel, condo, branded villas and marina.**
- ▶ Most investors are willing to partner with local and/or other international investors with a minor stake. Preferably a consortium of corporate local and foreign partners with experience in tourism developments.

Sustainable Tourism Master plan for Belize 2030

Attracting Foreign Direct Investment (FDI) for Tourism development Study

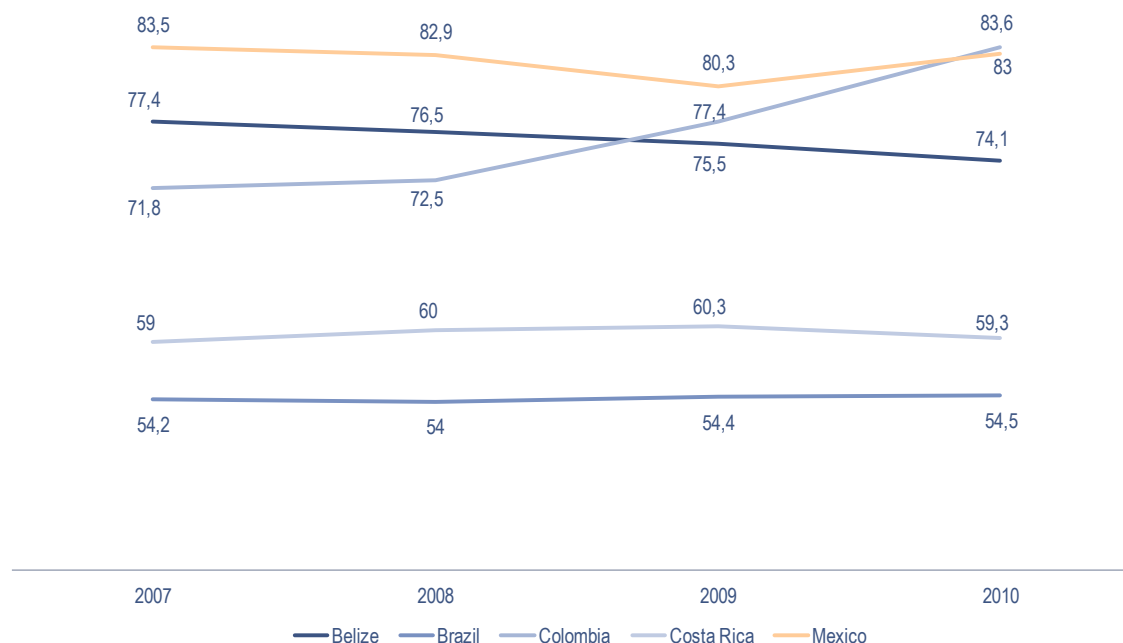
Investors/Hotel Operators surveyed:

- ▶ **Occidental**
- ▶ **Iberostar**
- ▶ **H10**
- ▶ **RIU Hotels**
- ▶ **Rosewood**
- ▶ **Fairmont – Raffles**
- ▶ **Mandarin Oriental Hotel Group**
- ▶ **Hilton**
- ▶ **OHL**

Comperative analysis of Index of Economic Freedom

- ▶ The index of Economic Freedom allows to compare the freedom degree of countries on 10 main economic subjects and therefore evaluates where business is easier to implement
- ▶ Belize is ranked 14th out of 29 countries in the South and Central America/Caribbean region with an overall score of 63,8 which is 2,3 better than last year. The general economic freedom of the country is limited due to the low level of economical reforms, the high cost of conducting entrepreneurial activity and corruption.
- ▶ The following graphs compare the freedom indicators of Belize with Brazil, Colombia, Costa Rica and Mexico and focus mainly on business creation, tax level, importation regulations, government subvention, monetary flow, financial sector stability, investment freedom and property right level

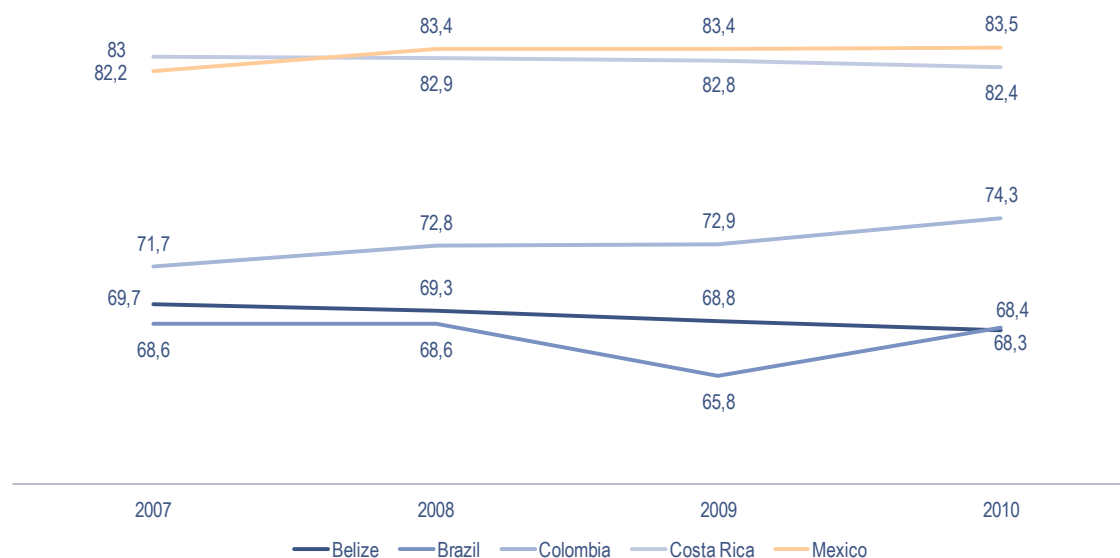
Business Freedom: quantitative measure of the ability to start, operate, and close a business



Belize scores 3rd best in this ranking. Mexico and Colombia offer simplified procedures for launching and running a business including short bureaucratic and licensing requirements and therefore present an enhanced business freedom.

Source: Heritage foundation, Eco freedom index, 2011

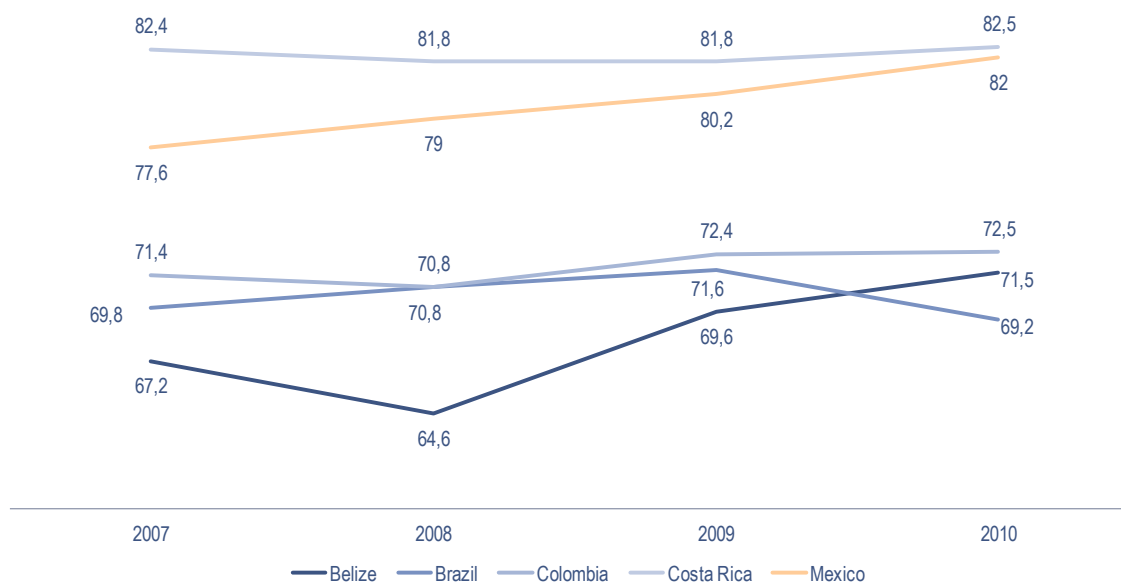
Fiscal Freedom: measure of the tax burden imposed by government



Costa Rica and Mexico apply moderate tax rates, e.g. income tax (25%), top corporate tax (30%) and a tax regime under which these tax rates are reduced annually by 1% until a selected year is reached (Mexico).

Source: Heritage foundation, Eco freedom index, 2011

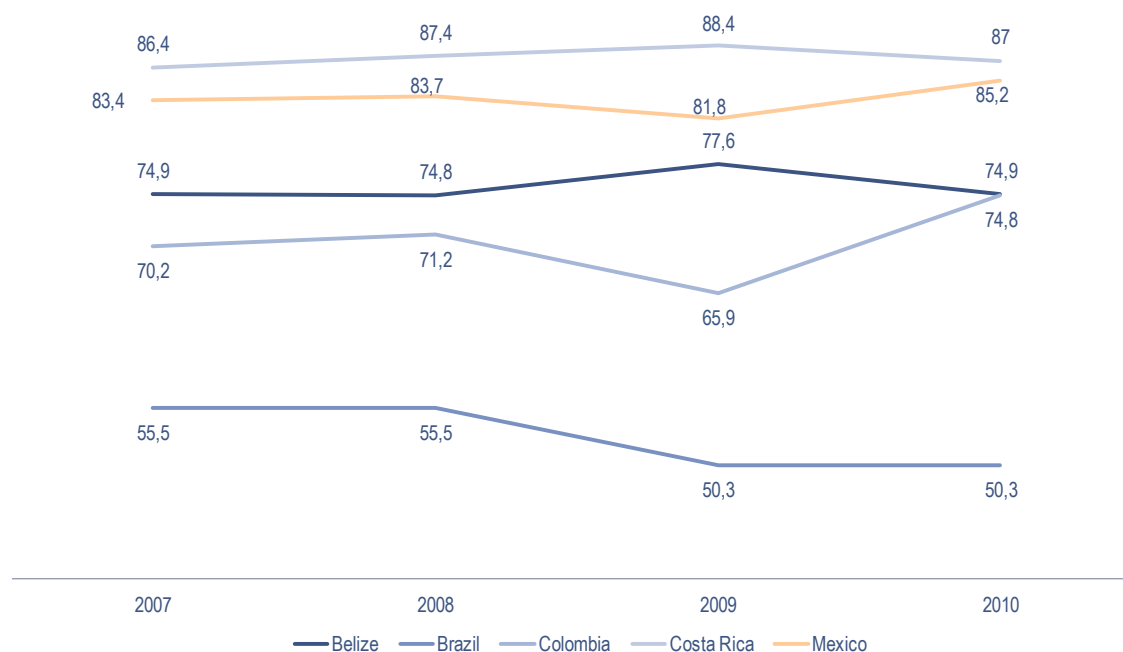
Trade Freedom: composite measure of the absence of tariff and non-tariff barriers that affect imports and exports of goods and services



Trade in Belize is subject to fewer import restrictions, is governed by simple import licensing rules, with anti-corruption programs for customs, and strong enforcement of intellectual property rights. These improvements will reduce trade costs.

Source: Heritage foundation, Eco freedom index, 2011

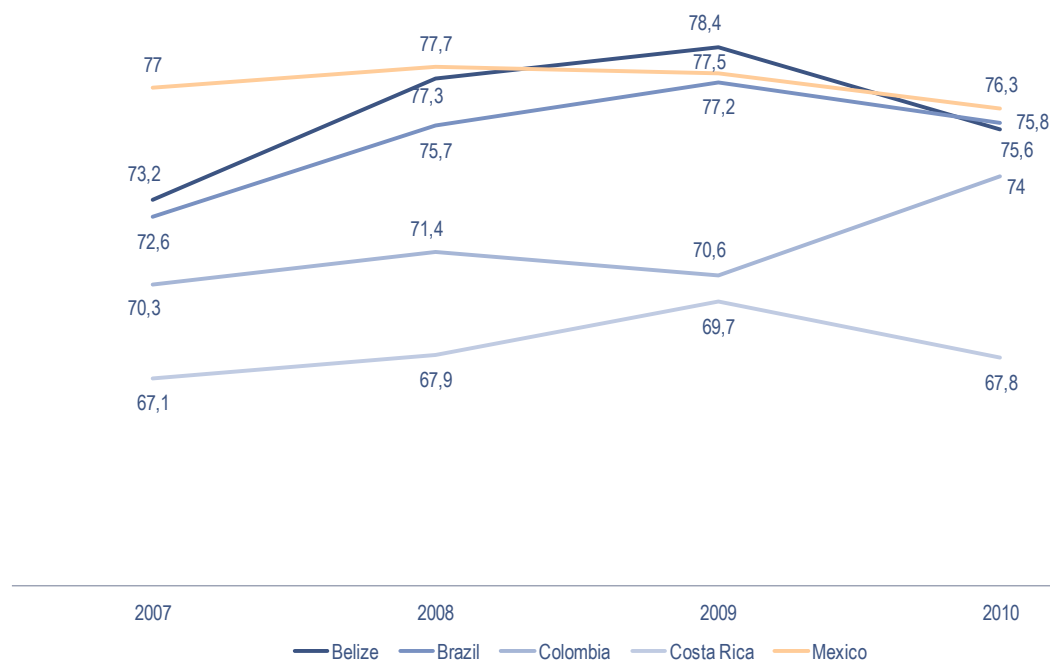
Government Spending: the level of government expenditures as a percentage of GDP



Costa Rica's and Mexico's government spending is higher than Belize's and these two countries have higher governmental expenditure including consumption and transfer payments. In addition, prudent fiscal management has allowed some leeway in stimulus spending.

Source: Heritage foundation, Eco freedom index, 2011

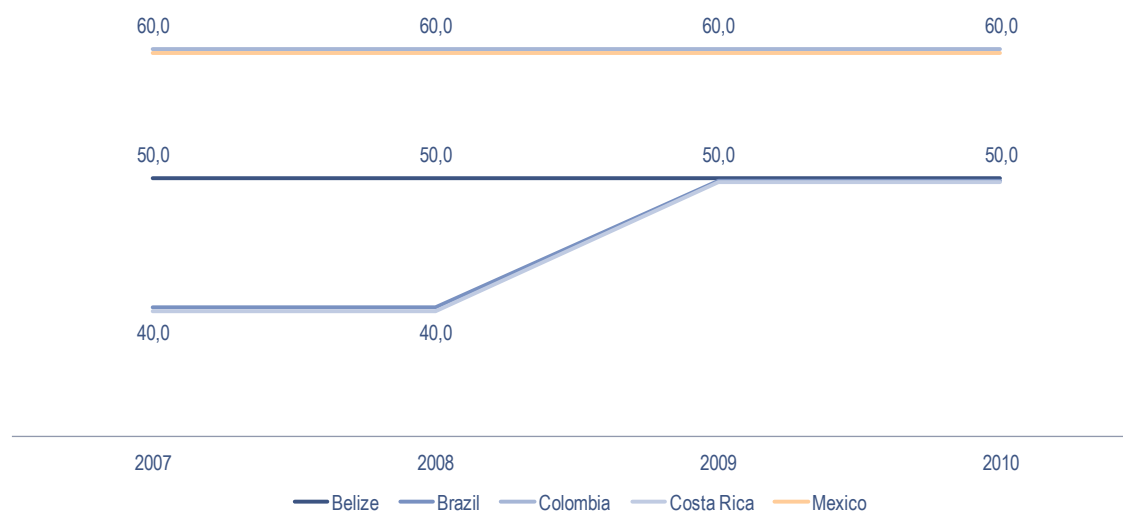
Monetary Freedom: measure of price stability with an assessment of price controls



Mexico and Brazil score better than Belize, due to their prudent fiscal and monetary policies which counteract inflation and stabilize domestic prices, led by public regulatory agencies.

Source: Heritage foundation, Eco freedom index, 2011

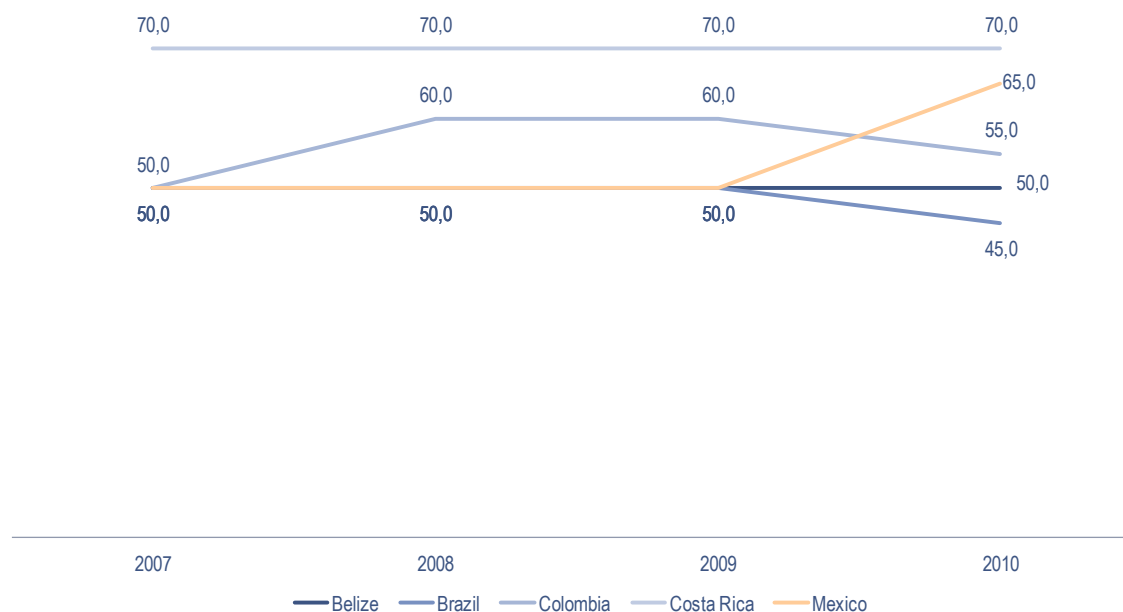
Financial Freedom: measure of banking efficiency as well as a measure of independence from government control and interference in the financial sector



Main target: to achieve a more stable and modern financial sector, for example, through governmental support to local banks, a controlled and reduced number of foreign banks, credit allocation on market terms, financial law that fosters more investment, options for pension funds and opening up of the stock market to foreign share issues.

Source: Heritage foundation, Eco freedom index, 2011

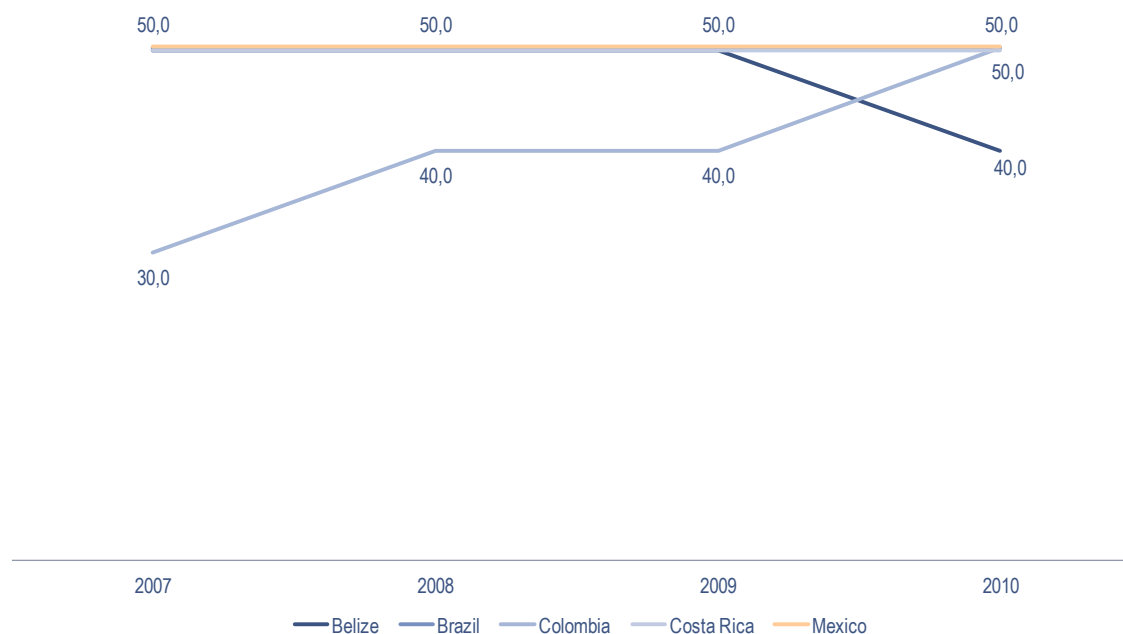
Investment Freedom: level of constraints on the flow of investment capital



In order to enhance the level of investment freedom, the following prerequisites should be further developed: equal treatment of foreign and domestic investors, and a simpler and more transparent bureaucracy. In addition, restriction-free payments, transactions and transfers would help to develop a higher level of investment freedom.

Source: Heritage foundation, Eco freedom index, 2011

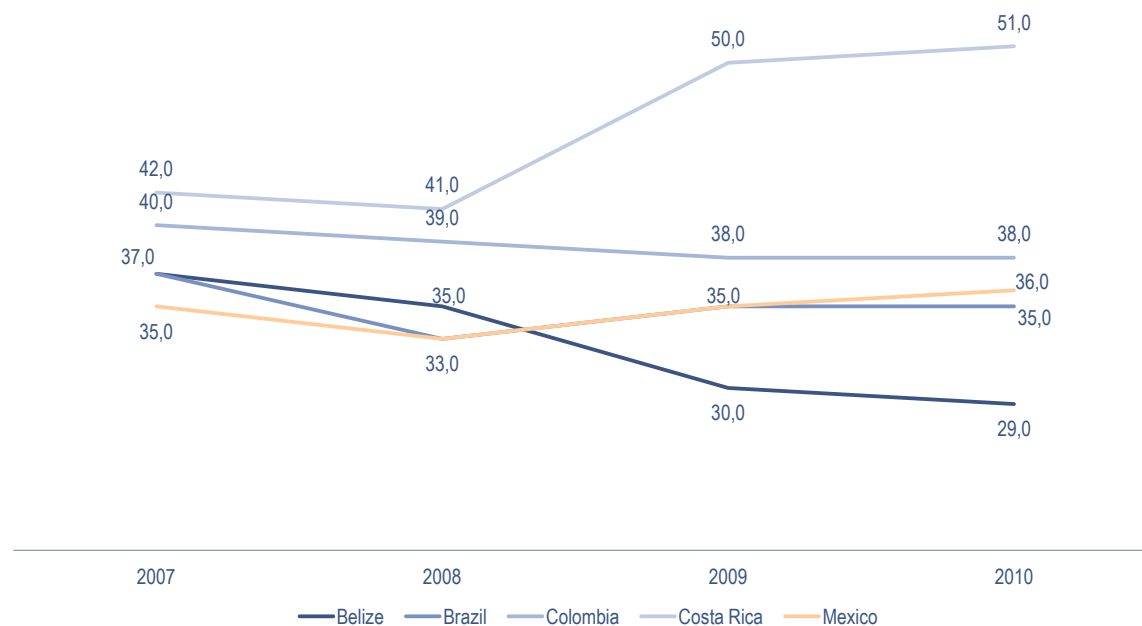
Property Rights: assessment of the ability of individuals to accumulate private property



All the countries analyzed suffer from repressed property rights. Steps to counter this should be measures to reduce the threat of property expropriation, foster fast resolution of judicial disputes, develop anti-corruption models, and secure the enforcement of property interests in the courts.

Source: Heritage foundation, Eco freedom index, 2011

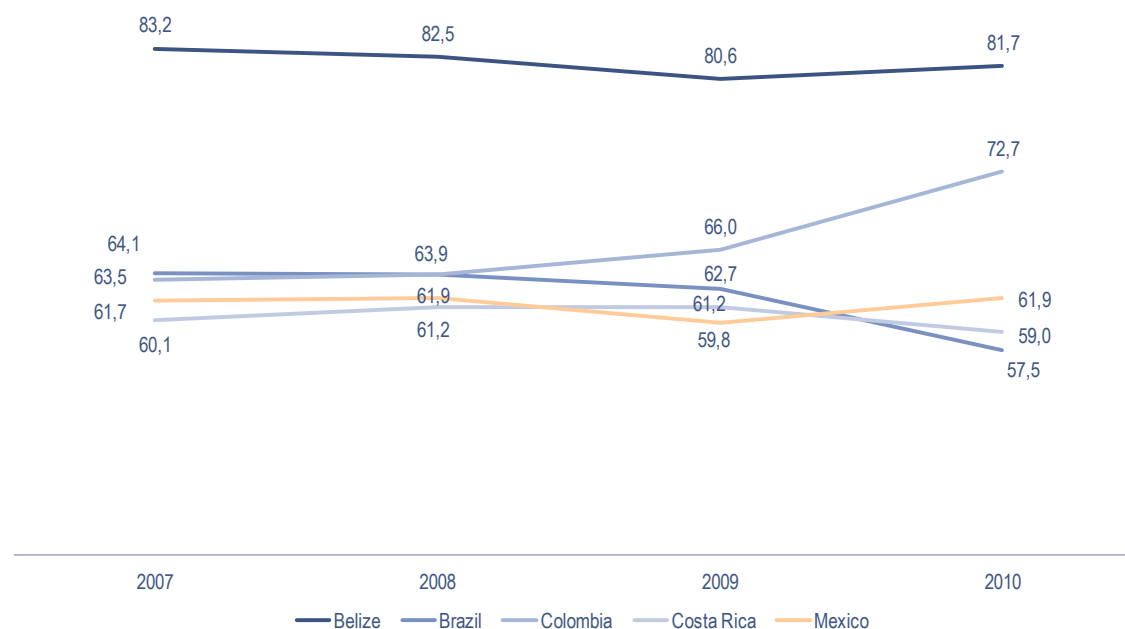
Freedom From Corruption: indicator derived from the Transparency International's Corruption Perceptions Index



All analyzed countries suffer from corruption. In order to counter this, emphasis should be given to the development and enforcement of anti-corruption laws, regulations, and penalties.

Source: Heritage foundation, Eco freedom index, 2011

Labor Freedom: quantitative measurement of various aspects of the legal and regulatory framework of a country's labor market

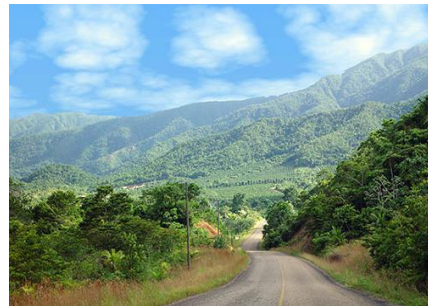
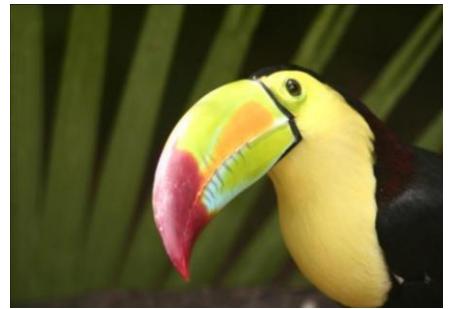


Belize has the highest score of the countries researched in terms of labor freedom; however, it still lacks full development of a formal labor market (ensuring skilled human resources and a reduced unemployment rate).

Source: Heritage foundation, Eco freedom index, 2011

NATIONAL SUSTAINABLE TOURISM MASTERPLAN FOR BELIZE 2030

National Tourism Sustainability and Quality Assurance Macro Program



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National Tourism Sustainability and Quality Assurance Macro Program

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National Tourism Sustainability and Quality Assurance Macro Program

The Sustainability and Quality Assurance Macro Program comprises of programs directed at raising the quality standards of the tourism service offering in order to reach international market demand standards and assure sustainable development of tourism economic resources.

There are three programs described:

1. Standards and quality management
2. Training and capacity building
3. Sustainable tourism development

The Standard and quality management section aims to raise the bar in minimum standard of tourism service delivery by increasing tour guide and tour operator licensing minimum requirements as a short term goal. In a second phase, and a long term approach, to raising quality standards it programs for an Integrated Tourism Quality Management systems where all stakeholders (public, private, civil society) participate in continuous quality improvements to the sector.

The training and capacity building program responds to the need of professionalizing the tourism human resources by addressing the quality of training and degree programs available in Belize. As a means of a long term solutions it envisions the creation of Hospitality Polytechnic Institute as a center of excellence for tourism hospitality training and tourism sustainable development research.

The sustainable development program provides the framework that will ensure the NSTMP maintains a balance of three pillars of sustainable development: social accountability, environmental conservation and economic prosperity. The program proposes mechanisms to address resource management and appropriate land use allocation while maintaining social and environmental safeguards and finding pro-poor mechanisms to link vulnerable groups to the tourism economic value chain.

1.1 Program for tourism standards and quality management

Gaps identified – Diagnostic

The results of the tourism sector diagnostics showed that there are considerable gaps and inconsistencies in the delivery of quality tourism services, low perception of cost-benefit and a lack of strong regulatory framework and jurisdiction controlling the quality offered to tourists by the tourism value chain components and tourism operators.

- ▶ **Transportation:** Low quality of services offered by tourism transportation means such as bus, taxi, boats, ferries, tender boats. Furthermore, tourist transportation does not come up to international safety standards
- ▶ **Accommodation:** Inconsistencies in quality tourism services and facilities and lack of standardization of hotel categories. Accommodation facilities are generally family-run hotels and guesthouses and tend to be of low capacity.
- ▶ **Food & Beverage:** Insufficient restaurant facilities of international standards and small quantity of high quality establishments concentrated in few areas. Furthermore, only a few food and beverage facilities come up to international food and safety hygiene standards.
- ▶ **Handicraft:** Very few handicraft shops and inefficient commercialization of traditional products. Furthermore, products offered are mostly of foreign origin and of poor quality.
- ▶ **Leisure activities:** Scarce offer of leisure activities and poor safety standards for the properties/sites and equipments.
- ▶ **Tourism assets:** Low level of investment in preservation efforts and ineffective visitor management systems of tourism assets which hinders sustainable usage of the assets. Furthermore, general lack of services up to international safety standards in terms of emergency response and first aid.
- ▶ **Tour Guides:** Lack of professional tour guides with certified specialist knowledge and fields of interest. Lack of foreign language knowledge to cater for an international clientele.

In order for the tourism industry in Belize to grow and attract a higher quality tourism market it is important to maintain a balance between tourism satisfaction and local tourism industry satisfaction approach while addressing solutions to the service delivery quality gap. Furthermore, the overall qualitative improvement of tourism destinations and their assets and services will improve Belize's competitiveness as an excellent tourism destination and set the stage towards the development of a world-class destination.

Vision 2030

By 2030 Belize will offer tourism services and facilities that are compliant with national and international quality standards, and this will attract and please a mid/high-end clientele, which will appreciate the adequate price-value ratio for services and facilities they consume.

Description of the program

The "Program for tourism standards and Quality Management" suggests a participatory approach to finding common ground solutions that improve tourist satisfaction ratings and customer loyalty without hindering the economic growth potential of tourism business. The program consists of the following sub-programs:

- ▶ **Sub-program for Tourism Operational standards and licensing** will devise new tour guide licensing categories and requirements, create tourism operational guidelines minimum

National Tourism Sustainability and Quality Assurance Macro Program

standards and revise current licensing requirements. The program aims to increase income generating potential of the tourism sector through improving overall service standards, legislation mechanisms and support services.

- ▶ **Sub-program for Tourism Integrated Quality Management (IQM) System and Certification** is a long-term approach for continuous improvement of service quality delivery and is subject to constant monitoring and multi-stakeholder cooperation and commitment in finding and implementing solutions which will raise the bar, standardize and regulate tourism operations service delivery.

Lead stakeholders

MTCAC should develop the standard and quality policies and regulations in conjunction with the local tourism stakeholders while BTB undertakes the executive task of enforcing quality standards and the operational licensing.

Objectives

The objectives of the tourism standards and quality management sub-program are:

- ▶ To improved visitor satisfaction by reaching international quality standards of Belize's tourism services and facilities
- ▶ To increase Belize's tourism service competitiveness by ensuring tour guides employed in Belize tourism industry are certified and well trained
- ▶ To position Belize as a World Class destination growth through the implementation of an effective IQM system that balances environmental considerations, socio-economic development, and maximum participation in reaching the common goal.
- ▶ To enhance tourism income by investing in the embellishment, modernization and restructuring of tourism facilities and increasing high-end/luxury facilities.

Milestones

Review Years	Milestones
2015	<ul style="list-style-type: none"> ▶ Tour guide licensing category and minimum requirements implemented. New specialty license category added. ▶ Revision of tourism operational guidelines started
2020	<ul style="list-style-type: none"> ▶ New specialty tour guide category added ▶ New tourism operator license requirements implemented ▶ Commence design of IQM system
2025	<ul style="list-style-type: none"> ▶ New specialty tour guide category added ▶ Launch of IQM system
2030	<ul style="list-style-type: none"> ▶ New specialty tour guide category added ▶ Revision of effectiveness and adjustment to business model of IQM system

National Tourism Sustainability and Quality Assurance Macro Program

Proposed subprograms and projects

1.1.1 Sub-program for Tourism Operational standards and licensing	
Description and projects	Time frame
<p>Devise new tour guide licensing categories and requirements, create tourism operational guidelines minimum standards and revise current licensing requirements. The program aims to increase income generating potential of the tourism sector through improving overall service standards, legislation mechanisms and support services.</p> <p>Tour guide licensing will not be fully implemented right away given the complexities of creating each specialty capacity building programs and certifications mechanism. At the same time they will not remain current forever, that is why a revision of current and addition of new categories is envisioned in the program, nevertheless, it should not be just one category to be added, but as many as are demand driven and ready to be implemented. It is encouraged that revisions and updates be launched in three to five year cycles.</p> <p>► Project 1: Revise current tour guide licensing categories and minimum requirements. Create a multiple layers of tour guide licenses scheme that responds to the complexities of tour guide activities and differences in expertise requirements and that will facilitate jurisdiction of guidance activities and will raise the bar on tour guiding.</p> <ul style="list-style-type: none"> • Create two types of general licenses that will distinguish between a guide by trade and a naturalist guide: <ol style="list-style-type: none"> <u>National Tour Guide:</u> This license will allow tour guiding across the country subject to guide specialty restrictions. Minimum requirements: <ol style="list-style-type: none"> Secondary School – Up to stage 4 Tour guide course certificate First aid and CPR certificate Search and Rescue certificate <u>Native Tour Guide:</u> This license will be restricted to certain areas where natives from the area demonstrate to have an advantage given their knowledge and insight of the area. Minimum requirements: <ol style="list-style-type: none"> Able to read and write Tour guide course certificate First aid and CPR certificate Search and Rescue certificate • Create multiple specialty licenses and ranking levels. A needs assessment of specialty licenses needs to be conducted and mechanisms of tour guide training and certification devised. <ol style="list-style-type: none"> <u>Specialty licenses:</u> Licenses according to field of expertise guide has demonstrated is capable of conducting. Such as, but not exclusive to: <ol style="list-style-type: none"> <u>Traditions and Culture:</u> General city/town/village tours <u>Archeological Sites:</u> Specific by archeological site <u>Inland Adventure Sports:</u> Specific by type of sports mastered (ie caving, hiking, bird watching, canopy, etc) <u>Water Adventure Sports:</u> Specific by type of water activity mastered (diving, snorkeling, rafting, kayaking, fishing, etc) <u>Ranking levels:</u> Create levels of expertise subject to number of years of guiding and provided levels of recommendations of previous employers. This will allow differentiation of salary ranges by rank. Year's requirement will be determined by specialty. <ol style="list-style-type: none"> <u>Enter level:</u> 1st year tour guide <u>Junior level:</u> 2 to 5 years depending on specialty <u>Senior level:</u> 3 years and above depending on specialty <u>Certifications:</u> A list of approved national and international certifications needs to be created (ie PADI) and/or device a mechanism of training with local and 	<p>Project 1 Starting date: 2012 Implementation: 4 years Revision every 5 years</p> <p>Project 2 Starting date: 2015 Implementation: 4 years</p> <p>Project 3 Starting date: 2018 Implementation: continuous</p>

1.1.1 Sub-program for Tourism Operational standards and licensing

- or international pre-approved partners (ie, NICH, Association of Caving Instructors)
- Conduct stakeholder meetings to validate suitability of new licensing scheme in the Belize context and revise where applicable.
- Revise and update Tour Guide Regulation policy to reflect new licensing scheme.
- Launch new licensing system in a phased manner according to product development readiness, market needs and certification programs availability. Revisions, adaptations and additions of new specialty licenses should be launched every three to five years.
- ▶ **Project 2: Develop tourism operations guidelines and minimum standards.** Develop minimum operational standards for the tourism industry and validate applicability to the Belizean context. These guidelines should become minimum requirements for tourism operations and licensing approval.
 - Benchmark regional guidelines and revise current existing guidelines in Belize.
 - Develop new specific operational guidelines by type of tourism operation applicable to the Belizean context.
 - i. Accommodation services
 - ii. Tour operators general and specialized operations (ie Adventure sports)
 - iii. Travel agency services
 - iv. Tourism site/attraction
 - v. Tourism transportation services
 - vi. Food & Beverage services
 - vii. Special feature for Community Tourism Operations
 - Scope to be covered within the guidelines:
 - i. Statutory obligations: Fulfillment of all statutory obligations were applicable
 - ii. Commercialization: Minimum requirements of information delivery to customers and contractual obligations
 - iii. Services provided:
 - a. Requirements of an operations plan
 - b. Requirements for safety and security procedures
 - c. Requirements for disaster preparedness and emergency plan
 - d. Requirements for tour guides
 - e. Requirements for food security
 - f. Limits and obligations of activities
 - iv. Infrastructure and equipment:
 - a. Requirements for infrastructure maintenance plans
 - b. Requirements for minimum equipment standards and maintenance plans
 - v. Quality labeling requirements: Specifically for hotel classification system
 - a. service standards
 - b. physical standards
 - c. safety standards
 - Validate feasibility of operator compliance with stakeholders before implementing them as a general rule for licensing requirements and renewal. Methods of validation should be stakeholder workshops, pilot projects and a combination of both.
- ▶ **Project 3: Revise current tourism operator licensing procedure and requirements.** Request proof of compliance to guidelines when applying and renewing operator licenses as a requirement. Develop a mechanism validating compliance to guideline

National Tourism Sustainability and Quality Assurance Macro Program

1.1.1 Sub-program for Tourism Operational standards and licensing

<p>requirements:</p> <ul style="list-style-type: none"> • Conduct an in-depth National Hotel asset audit and inventory. In a second order conduct an in-depth tour operator asset audit and inventory. • Revise and update tour operator licensing regulation policy to add new guidelines as minimum requirement standards for licensing approval and renewal. • Revise and update Hotels and Tourist accommodation act to add new guidelines as minimum requirement standards for licensing approval and renewal. • Develop a score system to rate level of compliance of operators/hotels to new guidelines. Allow a grace period for operators to comply and offer various support mechanisms to aid in the process of becoming compliant. • Train inspectors in the specifics of the tourism guidelines and its correct application. Automate the procedure as much as possible to avoid corruption. • Partner with non-partisan agency for or hire a body of inspectors and conduct timely audits to licensed operators for compliance of minimum requirements. • Device a penalty mechanism and revoke of license when appropriate. 	
Lead Responsible	Strategic Partners
BTB- Office of the Registrar of Hotels and Tourists Accommodation & Quality assurance department Belize Tour guide licensing committee Belize Tour operator licensing committee	<p><i>Tour guide Licensing:</i> Ministry of Education and Youth, BTIA, BTOA, BCIA, BTGA, NGOs (such as Audubon Society), insurance companies</p> <p><i>Guidelines:</i> MTCAC, Ministry of Health, NICH, BTIA, BTOA, insurance companies</p>
Destinations for implementation	
Nationwide	
Estimated cost (USD)	Potential financing sources
USD 1,810,000	Licensing fees and fines, Government funds and multilateral donors

1.1.2 Sub-program for Tourism Integrated Quality Management (IQM) System and Certification

Description and projects	Time frame
<p>Create a Belize tourism Integrated Quality management (IQM) takes into account, and have a favorable impact on the activities of tourism professionals, tourists, the local population and the environment (that is natural, cultural and manmade assets of the destination). Along with achieving global quality standards the goal is also to reach global sustainable tourism criteria on all levels relating to destination and product development to be reached in Belize.</p> <p>► Project 1: Define an Integrated Quality Management (IQM) System approach. Create an IQM participatory system with the aim at raising the quality standards of the entire tourism value chain through a continuous process of planning, implementation, reviewing and corrective measures. In order to create this system commitment from multiple stakeholders and a clearly defined process is needed. Also, this system has to be aligned and linked with commercial efforts done at the marketing chapter with Tourism Product Clubs, as these are voluntary and commercial oriented quality systems for tourism. Key planning considerations are:</p> <ul style="list-style-type: none"> • <u>Dynamics of partnerships:</u> Who will be the lead authority driving and implementing changes, strategic partners and division of roles between partners • <u>Dynamics of design:</u> Define strategies and policies required as drivers of 	<p>Project 1 Starting date: 2020 Implementation: 3 years</p> <p>Project 2 Starting date: 2022 Implementation: continuous</p> <p>Project 3 Starting date: 2023 Implementation:</p>

1.1.2 Sub-program for Tourism Integrated Quality Management (IQM) System and Certification

<p>change in human resources, natural resources, quality of life, cultural heritage, sustainability criteria etc.</p> <ul style="list-style-type: none"> • <u>Dynamics of implementation</u>: Lay the foundation for the implementation of corrective measures by the various public and private providers both within and outside the system. • <u>Dynamics of monitoring</u>: define sets of indicators by which partners involved and lead authority will evaluate satisfaction of the various target groups, integration into the community and conservation of resources from the point of view of sustainable development. • <u>Dynamics of evaluation and adjustment</u>: define process of analyzing lessons learned from corrective actions and means scaling up to other levels of the value chain. It is this ongoing repetition that causes the system to operate as a loop of continuous quality improvement. <p>► Project 2: Tourism business adhesion and certification of the IQM system. Create an accreditation system for business that support the IQM system and adopt the established best practices. The goal is to motivate the business community to adhere to homogenous quality levels by recognizing and distinguishing business against its competitors</p> <ul style="list-style-type: none"> • Define types of tourism business to be certified, such as: <ol style="list-style-type: none"> i. Tourism products ii. Tourism destinations iii. Authentic commercial products (handicraft, consumable products, etc) iv. Tourism services (accommodations, restaurants, tour operators, etc.) • Define services and benefits: <ol style="list-style-type: none"> i. Create best practices manuals by type of tourism business ii. Define synergies with marketing 'Product Clubs' program. iii. Define instructional manuals for adhesion to the system by line of business iv. Define technical assistance tools and modules of cooperation. v. Define benefits of adhesion to the system by line of business. • Define certification procedure: <ol style="list-style-type: none"> i. Design levels of certification and its requirements ii. Define certification process mechanism and support tools iii. Design internal communication and promotion plan. <p>► Project 3: Implement the Tourism Quality Management System of Belize. Once the business model and certification program has been defined a pilot program should be carried out before final implementation of the system.</p> <ul style="list-style-type: none"> • Design a pilot project to test the validity of the system with at least 1 destination and 10 businesses that represent the typologies contemplated in the plan. • Create and train a body of 'quality coaches' familiar with the system that will conduct future performance evaluations and maintain quality control of the system. Devise anti-corruption and transparency mechanisms. • On a voluntary basis implement the system across the country in a prioritized and phased manner: <ol style="list-style-type: none"> i. <u>Awareness campaign</u>: Launch a full scale awareness campaign to tourism stakeholders of importance and benefits of the quality management system ii. <u>Training phase</u>: Provide companies with the appropriate tools and training programs specifically linked to the understanding and implementation of the standards and quality system. 	<p>continuous</p>
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National Tourism Sustainability and Quality Assurance Macro Program

1.1.2 Sub-program for Tourism Integrated Quality Management (IQM) System and Certification	
<ul style="list-style-type: none"> iii. <u>Adaptation phase</u>: Offer aid packages for adjustment to system and allow a grace period of adaptation. iv. <u>Formalize certification system</u>: Implement certification and recognition of business adhering to the system and conduct performance evaluations. v. <u>Link with Product Club marketing program</u>: Formalize additional recognition and benefits of those that participate in the product club program and obtain quality certification. 	
Lead Responsible	Strategic Partners
BTB – Quality assurance department MTCAC BTIA	MTCAC, Local governments, Ministry of Economic Development, Ministry of Works, Ministry of Economic Development, Ministry of Natural Resources and the Environment, PACT, NGOs, BHA, BTOA, BCIA, BTGA
Destinations for implementation	
Nationwide: Phasing by key priority tourism areas	
Estimated cost (USD)	Potential financing sources
USD 5,150,000	Joint venture with private sector, ministries and local government Self generated fees through certification program

1.2 Program for Tourism Training and Capacity Building

Gaps identified – Diagnostic

The results of the tourism sector diagnostics showed that currently Belize's human resources are insufficiently trained in hospitality operational and management skills which is a major constraint in meeting international tourism market standards and in competing to attract powerful source markets. Further gaps identified were:

- ▶ Unstructured tourism educational and training programs arising from courses which do not meet the expectations and requirements of the tourism industry. These expectations and requirements would include: operational and management skills for hotel, hospitality services, tour guide, tour operators, food and beverage facilities, tourism assets and other skills required to offer supporting tourism services.
- ▶ Low capacity in foreign language skills
- ▶ Low management skills especially in management and financing
- ▶ Few certification and professional degree programs resulting in a lack of qualified staff and/or unemployable graduates
- ▶ Insufficiently trained tour guides in terms of specific knowledge, first aid and emergency response.

In order to promote sustainable tourism development in a high-end tourism destination, high quality standards are a prerequisite. The development of sustainable tourism in Belize should include the capacity development of skills and strive for higher quality educational and training opportunities for human resources operating in the tourism industry.

Vision 2030

By 2030, Belize will have developed its training and capacity building institutions providing diverse courses training operational and management staff that come up to the needs and requirements of the tourism industry. These human resources will be providing excellent services that will directly or indirectly lead to an enhanced visitor experience.

Description of the program

The "Program for Tourism Training and Capacity Building" addresses the gap in qualified tourism human resources through the revision of vocational training and tourism management curriculums and institutions, revision of tour guide training accreditation programs and the creation of a centre of excellence in tourism training and hospitality standards. The program consists of following sub-programs:

- ▶ **Subprogram for Hospitality Tourism Training Certifications and Degree Courses** develops the human resources' operational and management skills required by the local tourism industry in terms of international standards with an emphasis in developing practical training opportunities relevant to the Belize context. The goal is to increase the quality of tourism services management and delivery in the tourism sector and will therefore directly result in an enhanced customer experience and stimulate growth of the local tourism economy.
- ▶ The **Sub-program for Tour Guide Training and Accreditation** enhances skills among the Belize network of National Tour Guides through revision and updating of the general accreditation training modules, addition of safety and security certification modules and developing a mechanism to train and certify in specialty activities.

National Tourism Sustainability and Quality Assurance Macro Program

- ▶ The Sub-program for **Development of the Hospitality & Tourism Polytechnic Institute of Belize** creates a facility that embodies all elements of the National Sustainable Tourism Master plan's Sustainability and Quality Assurance program strategies: tourism operational safety and security standards, integrated tourism quality management, quality human resources capacity building, and sustainable tourism stewardship. Its core functions will be to operate a hospitality school, vocational training programs, an eco-lodge and sustainable tourism research centre. Although there are already business and tourism universities in Belize, there is still a gap in terms of the scope of training and real needs of the tourism sector.

Objectives

- ▶ To enhance the destinations' competitiveness by increasing effectiveness and completeness of the capacity building local offer
- ▶ To increase the pool of trained and skilled tourism work force
- ▶ To increase visitor satisfaction through enhancing quality of Belizean tourism services
- ▶ To improve income generation potential of employees and staff of the tourism industry

Lead stakeholders

BTB (Quality Assurance Department) in cooperation with MTCAC should develop certification schemes, strengthen training and capacity building institutions and foster the development of new training programs. All this should be done in partnership with the local tourism industry. Together they could create a tourism capacity building committee which would comprise of BTB Quality representatives and other public and private sector representatives.

Milestones

Review Years	Milestones
2015	<ul style="list-style-type: none"> ▶ Operational hospitality and tourism management curriculum revision completed and training institutions identified ▶ Pre-requisite courses for National Tour Guide licenses revised and implemented ▶ First set of specialty tour guide activities certification programs implemented ▶ Inauguration arrangements for the Hospitality and Tourism Polytechnic vocational school and hotel training facility
2020	<ul style="list-style-type: none"> ▶ Second set of specialty tour guide activities certification programs implemented ▶ Start planning for first satellite Hospitality and Tourism Polytechnic vocational school and hotel training facility
2025	<ul style="list-style-type: none"> ▶ Third set of specialty tour guide activities certification programs implemented ▶ Operations of first satellite Hospitality and Tourism Polytechnic vocational school and hotel training facility ▶ Start planning for second satellite Hospitality and Tourism Polytechnic vocational school and hotel training facility
2030	<ul style="list-style-type: none"> ▶ Fourth set of specialty tour guide activities certification programs implemented ▶ Operations of second satellite Hospitality and Tourism Polytechnic vocational school and hotel training facility

National Tourism Sustainability and Quality Assurance Macro Program

Proposed subprograms and projects

1.2.1 Sub-program for Hospitality Tourism Training certifications and degree programs	
Description and Projects	Time frame
<p>This sub-program will develop the human resources' operational and management skills required by the local tourism industry in terms of international standards with an emphasis in developing practical training opportunities relevant to the Belize context. The goal is to increase the quality of tourism services management and delivery in the tourism sector and will therefore directly result in an enhanced customer experience and stimulate growth of the local tourism economy. Training must be demand driven as it is expected that in the next 20 years there will be an influx of human resources from other sectors</p> <p>► Project 1: Operational hospitality and services continuous training. The project aim is to ensure Belize offers on a consistent basis and in terms of international standards of quality certificate programs and apprenticeships that cover all relevant topics of tourism hospitality operations. In order to strengthen current tourism hospitality training programs and devise new ones the following steps should be carried out by a special committee comprised of public and private sector that will proactively address the capacity building needs and devise solutions:</p> <ul style="list-style-type: none"> • Assessment of training necessities by sector, including requests from visitor survey and national and international tourism industry. This assessment should also include an analysis of the training provided by vocational and secondary schools to understand where the gap is between the institutions conducting the training and the needs of the industry. • Once gaps are identified a program should be established to help improve the curriculum of these training institutes and identification of new training modules, its requirements, possible partner training institution, and national and international development support mechanism. • Relevant sectors/subjects to assess include: <ol style="list-style-type: none"> i. <u>Hospitality training</u>: Front office operations and Housekeeping; Food and beverage operations: wine and bar, waitressing, cooking and pastry; customer relations and communication skills. ii. <u>Tourism support services</u>: Spa & massage services, handicraft design and sales, events management, tour operations, information technology, transportation, food & beverages, recreation & entertainment. iii. <u>Foreign language</u>: Multi-lingual levels in the tourism industry, including proper spoken Spanish and English and other European languages such as French and German. • Creation of a national certification system / international co-certification. Devise partnerships and agreements with national and international higher level institutions and private sector associations and business that will provide certification programs and apprenticeships and/or internship opportunities. • Design and execute certification curriculums and apprenticeship programs by topic. Prioritize deployment of programs by urgency and ease of implementation. Certificate programs should be designed for new comers to the industry as well as design special refresher courses for those already working in the industry. • Develop a targeted communication plan to attract industry new comers and current business and their personnel. Communicate training possibilities to the tourism sector, e.g. Information distribution over a centralized website that hosts the national certification system program. • Devise a monitoring and evaluation and continuous improvement mechanism for the national tourism hospitality training and certification system and create a stronger connection between these participating training institutes and the private sector to constantly monitor and improve the tourism workforce. <p>► Project 2: Tourism management professional degrees. This project aims to enhance the technical and administrative capacities of human resources new comers</p>	<p>Project 1 Starting date: 2013 Implementation: continuous</p> <p>Project 2 Starting date: 2014 Implementation: continuous</p>

1.2.1 Sub-program for Hospitality Tourism Training certifications and degree programs

and those already working in the Belize tourism industry. In order to reach necessary skills development and appropriate quality service levels the curriculums of current tourism management degrees need to be modified to respond to the tourism model of Belize. Such as in the previous project a similar process should be carried out by a special committee comprised of public and private sector that will proactively address the capacity building needs and devise solutions:

- Assessment of tourism management curriculum programs and industry needs, including requests from tourism business operations and employers - Identification of curriculum requirements and possible educational institution. Some topics to assess:
 - i. Sustainable tourism and alternative energy sources
 - ii. Corporate social responsibility
 - iii. Tourism product development
 - iv. Entrepreneurship and SME start-up
 - v. Tourism leadership skills
 - vi. Tourism marketing and sales
- Devise partnerships and agreements with national and international higher level institutions and private sector associations and business that will provide professional degree programs and apprenticeships and/or internship opportunities.
- Design professional degree curriculums and apprenticeship programs by topic. Prioritize deployment of programs by urgency and ease of implementation. Some relevant courses to consider as first priority topics:
 - i. Management and financing of tourism SME. This degree provides in-depth knowledge on business and management theories and presents various financing possibilities and practical case studies.
 - ii. Tourism marketing and sales training. These trainings will provide training in tourism marketing and sales, illustrating tourism specific case-studies by tourism value chain unit. At the end of the module, the participant will be able to restructure his international marketing and sales strategies and develop a diverse sales portfolio in order to improve his own product sales.
 - iii. Governmental tourism institutions' seminar. These seminars assesses the training requirements of the human resources employed by the tourism public sector and provides directions on how to improve work flows, knowledge and skills to enhance decision making and foster international and national funding possibilities.
 - iv. Tourism Planning and Destination Management: This program aims at providing tourism planning and understanding between the public and private sectors and the civil society to ensure that they work together in the same direction to guarantee a sustainable development and management of tourism destinations.
- Develop a targeted communication plan and incentives to encourage the industry to professionalize the sector through accredited educational programs.
- Devise a monitoring and evaluation and continuous improvement mechanism for the national tourism hospitality training and certification system.

Lead Responsible	Strategic Partners
Tourism Capacity Building committee: comprised of BTB representative(s) and other public and private sector representatives	Ministry of Education University of Belize; Galen University, ITVET and other junior colleges BTIA, BHA, BTOA International cooperation agencies International higher education institutions

National Tourism Sustainability and Quality Assurance Macro Program

1.2.1 Sub-program for Hospitality Tourism Training certifications and degree programs

Destinations for implementation	
Belize National Territory: All Institutions that offer tourism vocational and professional degree programs in Belize	
Estimated cost (USD)	Potential financing sources
USD 1,685,000	Multilateral support Self-financed through student fees

1.2.2 Sub-program for Tour Guide Training and accreditation

Description and Projects	Time frame
<p>This sub-program will enhance capacity skills of Belize network of National Tour Guides through revision and updating of the general accreditation training modules, addition of safety and security certification modules and developing a mechanism to train and certify in specialty activities. The implementation and monitoring of this system will support the new licensing scheme, new product development and long-term sustainability of the tourism industry.</p> <p>► Project 1: Pre-requisite courses for general tour guide license. Given the restructuring of tour guide licensing regulation a revision of the current tour guide accreditation program is needed along with a mechanism to support new prerequisites.</p> <ul style="list-style-type: none"> • <u>General tour guide course:</u> <ol style="list-style-type: none"> Evaluation of effectiveness of current tour guide training curriculum and institutions. Include tour guide and tour operator consultation and satisfaction survey. Identify gaps of current program. Benchmark inter-regional and international tour guide training curriculums. Identify key partners and institutions that will impart training modules. Design new National Tour Guide and Naturalist Tour Guide training curriculum and devise a refresher course module. Along with general knowledge of the country and tourism customer service skills emphasis should be made in leadership and crisis management skills, responsible usage of cultural and natural tourism resources, and problem-solving and conflict resolution skills Implement new <i>National Tour Guide Accreditation Program</i>. Devise a mechanism to monitor, evaluate and implement continuous improvement to the accreditation curriculum and program. • <u>First Aid and CPR:</u> Identify potential implementation partners and devise an implementation plan of course offering frequency and locations. • <u>Search & Rescue:</u> <ol style="list-style-type: none"> Identify types of search and rescue courses needed in Belize (i.e. still water, open water, wilderness) Identify potential implementation partners and devise an implementation plan of course offering frequency and locations. <p>► Project 2: Pre-requisite courses for specialty tour guide license. Given the restructuring of tour guide licensing regulations accreditation of specialty tour guide activity training courses and certification mechanisms need to be devised. Certification training programs should be designed and implemented a year before specialty license requirement is enforced.</p> <ul style="list-style-type: none"> • Identify need of specialty tour guide certification programs. Align with stakeholder consultation and product development needs. • Prioritize list of specialty certification programs that need to be devised based 	<p>Project 1 Starting date: 2014 Implementation: ongoing; revision of current programs and design of new curriculum after 10 years (2024)</p> <p>Project 2 Starting date: 2014 Implementation: ongoing; identification of needs and updates every 5 years</p>

National Tourism Sustainability and Quality Assurance Macro Program

1.2.2 Sub-program for Tour Guide Training and accreditation

<p>on market needs, ease of implementation and safety and security risks they present.</p> <ul style="list-style-type: none"> Identify key national and international partners and institutions that will impart training modules. Design an implementation plan for specialty tour guide program offering frequency and location. Some pre-identified specialty certification programs needed in Belize: <ul style="list-style-type: none"> i. Archaeological sites: A module per site should be devised. ii. Inland Adventure sports: caving, jungle hiking, bird watching, zip lining/rappelling, horseback riding, etc. iii. Water Adventure sports: cave tubing, kayaking, rafting, scuba, snorkeling, fly-fishing, etc. Devise a mechanism to monitor, evaluate and implement continuous improvement to the accreditation system and training institutions. 	
Lead Responsible	Strategic Partners
BTB – Quality assurance department Belize Tour guide licensing committee	Belize Tour Guide Association Ministry of Education University of Belize; Galen University, ITVET and other junior colleges BTIA, BHA, BTOA International specialty activity certification (ie, British caving association certificate scheme) International cooperation agencies
Destinations for implementation	
Belize National Territory	
Estimated cost (USD)	Potential financing sources
USD 1,165,000	Multilateral support Self-financed through student fees

1.2.3 Subprogram for Development of the Hospitality & Tourism Polytechnic Institute of Belize

Description and Projects	Time frame
<p>The aim is to create a facility that embodies all elements of the National Sustainable Tourism Master plan Sustainability and Quality Assurance program strategies: tourism operational safety and security standards, integrated tourism quality management, quality human resources capacity building, and sustainable tourism stewardship. Its core functions will be to operate a hospitality school, vocational training programs, an eco-lodge and sustainable tourism research centre. Although there are already business and tourism universities in Belize, there is still a gap in terms of scope of training and real needs of tourism sector. This Polytechnic aims to prepare staff students in a vocational and operations oriented way, providing the tools and knowledge required to cover tourism sector needs.</p> <p>► Project 1: Development of a Hospitality and Tourism Polytechnic vocational school and hotel training facility. This institute seeks to establish Belize's premier vocational education institute and a self-sustaining hotel training facility. In Belize there is already pre-existing plans (ie Mesoamerican Tourism Institute of Belize) to carry out such a facility and should be used as a starting point in assessing the feasibility and business plan:</p> <ul style="list-style-type: none"> Starting from the already devised MESO model update the business model and feasibility assessment of the institute taking into account the new 2030 vision and strategies set forth by the National Sustainable Tourism Master plan. Identify strategic partnership schemes and funding sources Revise feasibility of the proposed Guanacaste park site in Belmopan (as suggested by MESO plan) and explore other options. Lobby for government land concession for the project site. Strategically the site should be located in government owned land in order to strengthen government support and contribution to sustainable tourism development. Define products and services to be offered by the institution and hotel training facility and implementation partners. The institution will lend itself for: <ol style="list-style-type: none"> Front & back house training; Tour guide training; Tourism management training; other tourism related services and sustainable tourism research and innovation Once site location has been establish conduct master planning of site and architectural design utilizing green technology and sustainable development principals. Commence development and construction phase. Plan and conduct a nationwide awareness program and international promotional campaign Inaugurate institution and initiate operational phase. Devise a monitoring, evaluation and continuous improvement mechanisms of educational and training program. <p>► Project 2: Expand Hospitality and Tourism Polytechnic vocational school and hotel training facilities. Once the Tourism Polytechnic vocational training hotel and school facility and program has been established and operations have proven successful and economically self-sustainable, then plan the expansion project.</p> <ul style="list-style-type: none"> Identify strategic areas for expansion by market demand (both availability of students and hotel clientele) criteria. Conduct feasibility analysis of identified sites and adapt business model to the site specific needs and requirements. Identify strategic partnership schemes and funding sources per site Lobby for government land concession for the project sites. 	<p>Project 1 Starting date: 2015 Implementation: construction 6months, Stabilized year-5th year of operation Ongoing operation: self-sustaining</p> <p>Project 2 Starting date P2: 2022 Implementation P2: 2024 (first satellite) Implementation P2: 2029 (second satellite)</p>

National Tourism Sustainability and Quality Assurance Macro Program

1.2.3 Subprogram for Development of the Hospitality & Tourism Polytechnic Institute of Belize

- Define products and services to be offered by the institution and hotel training facility and implementation partners.
- Once site location has been established conduct master planning of site and architectural design utilizing green technology and sustainable development principals. Commence development and construction phase.
- Plan and conduct a nationwide awareness program and international promotional campaign
- Inaugurate institution and initiate operational phase.
- Devise a monitoring, evaluation and continuous improvement mechanisms of educational and training program.

Lead Responsible	Strategic Partners
BTB BTIA Mesoamerican Tourism Institute of Belize	MTCAC BHA, BTOA, BTGA Ministry of Education Ministry of Economic Development Beltraide
Destinations for implementation	
Main Institute: Belmopan Regional chapters to be added: Belize City; Stann Creek district; Ambergris Caye.	
Estimated cost (USD)	Potential financing sources
USD 23,500,000	National Sustainable Tourism trust Fund – Seed Capital Government appointed land concession Multilateral Grant/loan Self-sustaining operational income

1.3 Program for Sustainable Tourism Development

Gaps identified - Diagnostic

The industry diagnostics study showed that Belize's sustainable tourism development is challenged by the present conditions of its environmental, economic and social status.

- ▶ Main **environmental challenges** are solid waste management and disposal, dredging infrastructures, accelerated beach erosion, water pollution caused by inadequate waste water discharge, mangrove clearance, poor sewage collection and treatment systems
- ▶ Belize is especially vulnerable to **natural hazards and climate change** experiencing hurricanes, storms and flooding. In addition, rising sea levels pose risks for flooding, inundation, saltwater intrusion, and erosion, which threaten water supplies, infrastructure, and coastal areas.
- ▶ With a recent **poverty level** of 43% and a slow economic growth rate while experiencing a population growth rate approaching 3.7% per annum, there is a serious need for action to be taken to ensure economic growth and the creation of employment opportunities.
- ▶ Major **tourist attractions** visited by cruise visitors are exposed on a daily basis to serious environmental and social negative impacts through the mass tourism activity caused by the cruise industry.

Vision 2030

By 2030, Belize will have found its path towards sustainable tourism development, successfully linking poor and ethnic minority groups to the tourism value chain economic activity, and respectfully using the natural, cultural and manmade tourism resources. The tourism strategies and their implementation will most efficiently and effectively harness the social, environmental and economic benefits provided.

Description of the program

The sustainable development program provides the framework that will ensure the NSTMP maintains a balance of the three pillars of sustainable development: social accountability, environmental conservation and economic prosperity. The program proposes mechanisms to address resource management and appropriate land use allocation while maintaining social and environmental safeguards and finding pro-poor mechanisms to link vulnerable groups to the tourism economic value chain.

The program addresses sustainability issues by proposing the following subprograms:

- ▶ The **Sub-program for Tourism Resources Management and Conservation** aims to identify and qualify an economic value of the resource in order to raise awareness and justify conservation efforts. The subprogram designs a plan to identify and assign an economic value of the tourism resources in order to define limits of change and validate conservation efforts.
- ▶ The **Sub-program for Tourism Land Use Planning and Development Support** aims to create a framework for tourism land use allocation that involves planning with social and environmental safeguarding criteria. The sub-program creates a land use master planning process of tourism zones as a standard for tourism development.
- ▶ The **Sub-program for Pro-poor Tourism and Ethnic Groups Tourism Linkage** supports efforts to identify and support vulnerable groups to benefit from the tourism economic value chain by strengthening the participation through the development of inclusion mechanisms.

National Tourism Sustainability and Quality Assurance Macro Program

Lead stakeholders

The main lead should be taken by BTB's product development department, strengthened by MTCAC. The main task is the analysis of the sustainability indicators and the potential solutions to improving them. Together with the local tourism industry, gaps for pro-poor linkages can be identified. By partnering with local NGO and community/municipality institutions, inclusion mechanisms and solutions can be recognized.

Objectives

- ▶ To foster sustainable usage of tourism resources by creating an over-arching conservation vision and policy to protect resources necessary to the tourism industry and the
- ▶ To secure long term health of the economy through creating a long-term approach to land use planning that will conserve the quality of the fundamental resources as well as encourage high quality tourism in Belize.
- ▶ To alleviate poverty by effectively linking poor and ethnic minority groups to the tourism value chain economic activities
- ▶ To secure local income generation through time by conservation efforts of tourism cultural and natural assets.

Milestones

Review Years	Milestones
2015	<ul style="list-style-type: none"> ▶ Tourism resources identified, mapped and classified ▶ Commission limits of change studies for vulnerable tourism assets ▶ Special sustainable tourism projects initiative support criteria developed and yearly strategy launched
2020	<ul style="list-style-type: none"> ▶ All limits of change indicators have been established for all identified vulnerable tourism assets and monitoring and conservation initiatives in progress. ▶ 5 year review of tourism assets mapping and classification
2025	<ul style="list-style-type: none"> ▶ 5 year review of tourism assets mapping and classification
2030	<ul style="list-style-type: none"> ▶ 5 year review of tourism assets mapping and classification

Proposed subprograms and projects

1.3.1 Sub-Program for Tourism resources management and conservation	
Description of project Projects	Time frame
<p>Creates a conservation ethic in Belize and takes the appropriate steps to effectively conserve and maintain the integrity of tourism resources and in term protects the long term health of the tourism economy. The subprogram designs a plan to identify and assign an economic value of the tourism resources in order to define limits of change and validate conservation efforts. Finally establishes an ongoing commitment to conservation by driving and supporting special projects.</p> <ul style="list-style-type: none"> ▶ Project 1: Identification and mapping of tourism resources. Identify, map and classify in quantitative and qualitative terms the value creating natural, cultural and manmade tourism resources. This needs to be readily available to all tourism agencies and stakeholders. It also needs to be maintained as new resources are identified, 	<p>Project 1: Starting date: 2012 Implementation: revision every 5 years</p> <p>Project 2: Starting date: 2015</p>

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1.3.1 Sub-Program for Tourism resources management and conservation

created and consumed.	Implementation: 2020 Duration: continuous
<p>▶ Project 2: Management and conservation of tourism resources: In a collaborate effort between the private sector and the specific asset management agencies work towards conserving the long-term integrity of the tourism assets by:</p> <ul style="list-style-type: none">• Prioritizing tourism assets based on the quantitative and qualitative value and vulnerability status• Identify sources of funding for studies, monitoring and conservation initiatives• Commission a study of the long term effects of existing and anticipated development practices on the top priority tourism resources in question. This can address alternative scenarios for future development and clearly demonstrate to all stakeholders the effects of conservation efforts or the lack thereof could have.• Set limits of change targets and monitoring mechanisms of evaluated resources.• Establish conservation initiatives and development control per identified issue. Formulate and implement the appropriate environmental design and development controls that consider issues such as water quality of the marine environment, tree preservation, development on steep land, disturbed areas, clustering development in existing urban areas and water conservation.• Contribute content and information to the following programs:<ul style="list-style-type: none">i. <i>Land use planning:</i> contribute relevant information of the sensitivity of the tourism asset buffer zone areas in order to create appropriate of land use criteria and standards.ii. <i>Community awareness campaigns:</i> collaborate and provide content in the creation of conservation campaigns and the importance of natural and cultural resources to the future of tourism in Belize. <p>▶ Project 3: Special sustainable tourism projects initiative. Enhance sustainable development long-term commitments by driving and/or supporting special projects aimed to increase public, private and community conservation conscious. Develop criteria of initiatives to support and launch a yearly strategy. Examples of potential projects to initiate/support:</p> <ul style="list-style-type: none">• Maximize the value of government owned land by using it to showcase good practices demonstration projects and early sources of income to fund conservation initiatives.• Establish Fast Track projects that will enhance sustainable development momentum. Create a priority list of 5 projects and take them to the investor market.• Yearly award for outstanding contribution to conservation and sustainable tourism development to private and/or community organizations.	<p>Project 3: Starting date: 2020 Implementation: continuous</p>
Lead Responsible	Strategic Partners
BTB – product development & Quality assurance	Beltraide, PACT, NGOs, BTIA, BTOA, BTGA, BCTA, Ministry of Tourism, Ministry of Natural Resources and the Environment, Ministry of Economic Development, Ministry of Agriculture & Fisheries, Coastal Zone management Authority, Municipal Governments
Destinations for implementation	
Nationwide	
Estimated cost (USD)	Potential financing sources
USD 5,350,000	PACT, Ministry of Natural Resources and the Environment Ministry of Tourism – NSTTF. Multilateral support

National Tourism Sustainability and Quality Assurance Macro Program

1.3.2 Sub-program for Tourism Land Use Planning and development support

Description of project Projects		Time frame
<p>Establishes clear and evenly applied standards for tourism development that consider environmental, social, cultural and economic well being of Belize. Through the creation of a land use master planning process of tourism zones as a standard for tourism development.</p> <p>▶ Project 1: Develop a Land Use Master Plan for new and emerging destinations.</p> <ul style="list-style-type: none">• Create a centralized data base of mapped and demographic data that can be used to base land use plans on scientific data and models that can assess the degree of change that development will affect on the environment. Develop safe guard mechanisms to protect local communities from potential “imported inflation” caused by tourism development as well as inclusion mechanism.• Create clear development standards and design guidelines or <i>Land Use Plan</i> that address the issues of quality and context of tourism development for every tourism designated destination in Belize. These standards, and the processes used to administrate them should be form-based, so that the authenticity of development can be conserved. The land use framework is described in Annex. Land Use Framework• Enforce Land Use Planning by converting categories, building criteria, landscape principles, urbanization criteria, etc. into law. A first set of guidelines for tourism development, according to Land Use Planning concepts for different destinations and products, is at Annex. Land Use Framework		<p>Project 1: Starting date: 2012 Duration: continuous</p>
Lead Responsible	Strategic Partners	
NSTTF BTB – product development Municipal Government	Beltraide Ministry of Tourism Ministry of Natural Resources and the Environment Ministry of Economic Development Ministry of Agriculture & Fisheries Department of Housing	
Destinations for implementation		
Nationwide		
Estimated cost (USD)	Potential financing sources	
USD 3,450,000	NSTTF Ministry of Natural Resources and the Environment Ministry of Tourism Multilateral support	

1.3.3 Sub-program for Pro-poor Tourism and ethnic groups tourism linkage

Description of project Projects		Time frame
<p>Supports effective linkages to poor and ethnic minority individuals to the tourism value chain economic activity through the identification and vulnerable groups that live in the buffer zones of tourism areas and the design of feasible mechanisms to channel tourism income into their livelihood activities.</p> <p>▶ Project 1: Identification & assessment of vulnerable groups. Identify and map existence of poor families and ethnic groups that live and work in the buffer zones of tourism areas.</p> <ul style="list-style-type: none"> Rank vulnerabilities using indicators of human poverty condition and identify high risk at risk groups. Assess the tourism opportunities and linkage gaps that exists within the vulnerable groups/communities. 		<p>Project 1: Starting date: 2014 Duration: Continuous</p> <p>Project 2: Starting date: 2014 Duration: continuous</p>

1.3.3 Sub-program for Pro-poor Tourism and ethnic groups tourism linkage

- **Project 2: Support PPT and community linkages with the tourism economic sector.** Create a platform through joint ventures with NGOs and/or community associations that will support and enhance poor and ethnic minority individual's link with the tourism value chain economic activity. Many of the support activities will be to direct individuals to other initiatives. Linkage mechanisms to support are:
- **Training skills:** Assist in finding sources of funding and appropriate training opportunities. Find synergies with the education and awareness program.
 - **Credit support:** Assist in finding appropriate micro-credit schemes and sources to support these individuals micro/ small/ community tourism private initiatives. Find synergies with the investment and business support program.
 - **Negative impact of tourism:** Address negative impact of tourism, especially with regards to access to land for economic activities and/or land displacement due to tourism development. Influence establishment of standards in the Land Use Plan if appropriate.
 - **Boost local suppliers participation:** Provide assistance and collaboration to boost opportunities for the poor and ethnic minority in supplying the tourism value chain through formal and informal sales.
 - **Empowering actions:** Encourage active participation of poor and ethnic minority groups in decision making regarding the destination development and the tourism industry. Facilitate organization of the poor to participate in and receive tangible and intangible benefits from the tourism activity.
 - **Encouraging tourism philanthropy:** Provide tourism information to visitors about pro-poor initiatives, locally produce and fair trade products and information on how to get involve directly or indirectly in local philanthropic activities.
 - **Allocation of tourism tax income for community development:** Promote allocation of tourism tax/ fees receipts for local community economic infrastructure development, educational facilities, and social causes among others that fit designated criteria.
 - **Encourage Social Responsibility amongst the private sector:** By means of the tourism sector incentives encourage social responsibility incentives among the private sector such as:
 - i. Provide subsidy/ incentives to tourism operators for local procurement and recruitment of poor and ethnic minority individuals
 - ii. Provide subsidy/ incentives to tourism operators that investment in tourism infrastructure that benefit the community
 - iii. Provide subsidy/ incentives to tourism operators that donate to the community development causes.

Lead Responsible	Strategic Partners
Belize Social Investment Fund BTB, Municipal Government Ministry of Economic Development - Poverty Alleviation	Ministry of Tourism, Ministry of Human Development, Ministry of Youth, Ministry of Human Development, NGOs, DFC
Destinations for implementation	
Nationwide	
Estimated cost (USD)	Potential financing sources
USD 2,550,000	WB - Belize Social Investment Fund Multilateral support NGOs

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1.4 National Tourism Sustainability and Quality Assurance Macro Program Schedule

Project/Year	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
1. Program for tourism standards and quality management																			
Sub-program 1. for Tourism Operational standards and licensing																			
Project 1. Revise tour guide licensing categories and minimum standards																			
Project 2. Develop tourism operational guidelines																			
Project 3. Revise licensing procedure and requirements																			
Sub program 2. Tourism Quality Management System and Certifications																			
Project 1. Define an Integrated Quality Management System approach																			
Project 2. Adhesion and certification to the IQM system																			
Project 3. Implement the Tourism Quality Management System of Belize.																			
2. Program for Tourism Training and Capacity Building																			
Sub-program 1. Strengthening Hospitality Tourism Training certifications and degree programs																			
Project 1. Operational hospitality and service quality training																			
Project 2. Tourism management professional degrees																			
Sub-program 2. Subprogram for Tour guide training and accreditation																			
Project 1. Pre-requisite courses for general tour guide license																			
Project 2. Pre-requisite courses for specialty tour guide license.																			
Sub-program 3. Development of the Hospitality & Tourism Polytechnic Institute of Belize																			
Project 1. Development of a Hospitality and Tourism Polytechnic vocational school and hotel training facility.																			
Project 2. Expand Hospitality and Tourism Polytechnic vocational school and hotel training facilities																			
3. Program for Sustainable Tourism Development																			
Sub-program 1. Tourism resources management and conservation																			
Project 1. Identification and mapping of tourism resources																			
Project 2. Management and conservation of tourism resources																			
Project 3. Special sustainable tourism projects initiative																			
Sub-program 2. Tourism Land Use Planning and development support																			
Project 1: Develop a Land Use Master Plan for new and emerging destinations.																			
Sub-program 3. Pro-poor Tourism and ethnic groups tourism linkage																			
Project 1: Identification & mapping of vulnerable groups.																			
Project 2: Support PPT and community linkages with the tourism economic sector																			

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1.5 Budget of the National Tourism Sustainability and Quality Assurance Macro Program

Project/Year	Total (US\$)	2012	2013	2014	2015	2016	2017	2018	2019	2020
1. Program for tourism standards and quality management	6,960,000	25,000	25,000	50,000	100,000	50,000	50,000	150,000	200,000	320,000
Sub-program 1. for Tourism Operational standards and licensing	1,810,000	25,000	25,000	50,000	100,000	50,000	50,000	150,000	200,000	120,000
Project 1. Revise tour guide licensing categories and minimum standards	210,000	25,000	25,000	50,000	50,000					20,000
Project 2. Develop tourism operational guidelines	200,000				50,000	50,000	50,000	50,000		
Project 3. Revise licensing procedure and requirements	1,400,000							100,000	200,000	100,000
Sub program 2. Tourism Quality Management System and Certifications	5,150,000	-	-	-	-	-	-	-	-	200,000
Project 1. Define an Integrated Quality Management System approach	500,000									200,000
Project 2. Adhesion and certification to the IQM system	650,000									
Project 3. Implement the Tourism Quality Management System of Belize.	4,000,000									
2. Program for Tourism Training and Capacity Building	26,350,000	-	35,000	435,000	5,500,000	1,675,000	1,610,000	1,610,000	1,665,000	1,610,000
Sub-program 1. Strengthening Hospitality Tourism Training certifications and degree programs	1,685,000	-	35,000	235,000	300,000	135,000	70,000	70,000	70,000	70,000
Project 1. Operational hospitality and service quality training	860,000		35,000	200,000	100,000	35,000	35,000	35,000	35,000	35,000
Project 2. Tourism management professional degrees	825,000			35,000	200,000	100,000	35,000	35,000	35,000	35,000
Sub-program 2. Subprogram for Tour guide training and accreditation	1,165,000	-	-	200,000	200,000	40,000	40,000	40,000	95,000	40,000
Project 1. Pre-requisite courses for general tour guide license	500,000			100,000	100,000	20,000	20,000	20,000	20,000	20,000
Project 2. Pre-requisite courses for specialty tour guide license.	665,000			100,000	100,000	20,000	20,000	20,000	75,000	20,000
Sub-program 3. Development of the Hospitality & Tourism Polytechnic Institute of Belize	23,500,000	-	-	-	5,000,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Project 1. Development of a Hospitality and Tourism Polytechnic vocational school and hotel training facility.	12,500,000				5,000,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Project 2. Expand Hospitality and Tourism Polytechnic vocational school and hotel training facilities	11,000,000									
3. Program for Sustainable Tourism Development	11,700,000	400,000	300,000	450,000	700,000	600,000	600,000	600,000	600,000	750,000
Sub-program 1. Tourism resources management and conservation	5,350,000	200,000	100,000	100,000	350,000	250,000	250,000	250,000	250,000	400,000
Project 1. Identification and mapping of tourism resources	800,000	200,000	100,000	100,000	100,000					100,000
Project 2. Management and conservation of tourism resources	4,000,000				250,000	250,000	250,000	250,000	250,000	250,000
Project 3. Special sustainable tourism projects initiative	550,000									50,000
Sub-program 2. Tourism Land Use Planning and development support	3,800,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000
Project 1: Develop a Land Use Master Plan for new and emerging destinations.	3,800,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000
Sub-program 3. Pro-poor Tourism and ethnic groups tourism linkage	2,550,000	-	-	150,000	150,000	150,000	150,000	150,000	150,000	150,000
Project 1: Identification & mapping of vulnerable groups.	1,700,000			100,000	100,000	100,000	100,000	100,000	100,000	100,000
Project 2: Support PPT and community linkages with the tourism economic sector	850,000			50,000	50,000	50,000	50,000	50,000	50,000	50,000
TOTAL BUDGET QUALITY MACRO PROGRAM	45,010,000	425,000	360,000	935,000	6,300,000	2,325,000	2,260,000	2,360,000	2,465,000	2,680,000

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Project/Year	Total (US\$)	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
1. Program for tourism standards and quality management	6,960,000	300,000	300,000	400,000	300,000	420,000	550,000	750,000	850,000	950,000	1,170,000
Sub-program 1. for Tourism Operational standards and licensing	1,810,000	100,000	100,000	100,000	100,000	120,000	100,000	100,000	100,000	100,000	120,000
Project 1. Revise tour guide licensing categories and minimum standards	210,000					20,000					20,000
Project 2. Develop tourism operational guidelines	200,000										
Project 3. Revise licensing procedure and requirements	1,400,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
Sub program 2. Tourism Quality Management System and Certifications	5,150,000	200,000	200,000	300,000	200,000	300,000	450,000	650,000	750,000	850,000	1,050,000
Project 1. Define an Integrated Quality Management System approach	500,000	200,000	100,000								
Project 2. Adhesion and certification to the IQM system	650,000		100,000	100,000	100,000	100,000	50,000	50,000	50,000	50,000	50,000
Project 3. Implement the Tourism Quality Management System of Belize.	4,000,000			200,000	100,000	200,000	400,000	600,000	700,000	800,000	1,000,000
2. Program for Tourism Training and Capacity Building	26,350,000	110,000	2,610,000	860,000	915,000	860,000	860,000	3,360,000	860,000	915,000	860,000
Sub-program 1. Strengthening Hospitality Tourism Training certifications and degree programs	1,685,000	70,000	70,000	70,000	70,000	70,000	70,000	70,000	70,000	70,000	70,000
Project 1. Operational hospitality and service quality training	860,000	35,000	35,000	35,000	35,000	35,000	35,000	35,000	35,000	35,000	35,000
Project 2. Tourism management professional degrees	825,000	35,000	35,000	35,000	35,000	35,000	35,000	35,000	35,000	35,000	35,000
Sub-program 2. Subprogram for Tour guide training and accreditation	1,165,000	40,000	40,000	40,000	95,000	40,000	40,000	40,000	40,000	95,000	40,000
Project 1. Pre-requisite courses for general tour guide license	500,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000
Project 2. Pre-requisite courses for specialty tour guide license.	665,000	20,000	20,000	20,000	75,000	20,000	20,000	20,000	20,000	75,000	20,000
Sub-program 3. Development of the Hospitality & Tourism Polytechnic Institute of Belize	23,500,000	-	2,500,000	750,000	750,000	750,000	750,000	3,250,000	750,000	750,000	750,000
Project 1. Development of a Hospitality and Tourism Polytechnic vocational school and hotel training facility.	12,500,000										
Project 2. Expand Hospitality and Tourism Polytechnic vocational school and hotel training facilities	11,000,000		2,500,000	750,000	750,000	750,000	750,000	3,250,000	750,000	750,000	750,000
3. Program for Sustainable Tourism Development	11,700,000	650,000	650,000	650,000	650,000	750,000	650,000	650,000	650,000	650,000	750,000
Sub-program 1. Tourism resources management and conservation	5,350,000	300,000	300,000	300,000	300,000	400,000	300,000	300,000	300,000	300,000	400,000
Project 1. Identification and mapping of tourism resources	800,000					100,000					100,000
Project 2. Management and conservation of tourism resources	4,000,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000
Project 3. Special sustainable tourism projects initiative	550,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000
Sub-program 2. Tourism Land Use Planning and development support	3,800,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000
Project 1: Develop a Land Use Master Plan for new and emerging destinations.	3,800,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000
Sub-program 3. Pro-poor Tourism and ethnic groups tourism linkage	2,550,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000
Project 1: Identification & mapping of vulnerable groups.	1,700,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
Project 2: Support PPT and community linkages with the tourism economic sector	850,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000
TOTAL BUDGET QUALITY MACRO PROGRAM	45,010,000	1,060,000	3,560,000	1,910,000	1,865,000	2,030,000	2,060,000	4,760,000	2,360,000	2,515,000	2,780,000

Vocational Tourism School Benchmarks

Vocational Tourism School Benchmarks

					
Service structure	▶ Heart National Training agency, Jamaica	▶ Ecole Paul Dubrue, Cambodia	▶ Sekolah Tinggi Pariwisata Bali Tourism Institute, Bali	▶ Barbados community college, Barbados	▶ Tobago Hospitality & Tourism Institute, Tobago
Management/ Operation	▶ Training public organization ▶ Financed by 3% business tax	▶ NGO ▶ Funded by private and foundation donation, income from the training restaurants and hotel	▶ Tourism institute managed by the ministry of Tourism and culture of Republic Indonesia ▶ It is funded by the government	▶ The tourism institute is a joint venture between European Union and The Barbados government ▶ The college is managed by a board of management	▶ The school is a private company ▶ Its funded by the tuition fees and supports from diverse organizations
Programs	▶ Tourism and hospitality programs offered in 2 training center in the country ▶ Short courses and one year training available in Hospitality services, food preparation and reception	▶ Programs of one year in hospitality and tourism ▶ Programs of one year in F&B ▶ Programs of one year in cooking and pastry ▶ Short courses available for professional (Continuous education)	▶ Programs in tourism and hospitality ▶ Programs in Spa, food and beverage ▶ Programs in Events managements and MICE	▶ It proposes full-time bachelor of science in tourism and hospitality management, culinary arts, tourism and travel, hospitality ▶ Part-time programs in F&B, Reception, airport operation, Caribbean tourism	▶ The school proposes 2 year trainings in culinary arts, Hospitality management, F&B and Tourism studies
Partnership	▶ Cooperation with employment associations such as World international skills, Jamaica Employers Federation	▶ Partnership with worldwide tourism institutes to upgrade their programs ▶ Partnership with professional of the hospitality sector ▶ Partnership with diverse private foundations	▶ Partnership with several Indonesian professional associations ▶ School supported by the UNWTO, ILO, United Nation ESCAP, UNDP	▶ Collaboration with development associations ▶ Collaboration with tourism organization ▶ Partnership with Tourism institutes	▶ Partnership with tourism businesses of Tobago ▶ Registered with the Accreditation Council of Trinidad and Tobago
Training Hotel	▶ The agency owns a training hotel of 56 accommodations, restaurants, bars, conference facilities and sports facilities	▶ The school has a training hotel of 4 guests rooms as well as 2 training restaurants (A cafe and a gastronomic restaurant	▶ The training hotel has 17 accommodations, a restaurant and a spa facility	▶ The institute is located in the training hotel ▶ The hotel offers 21 accommodations and entertainment facilities	▶ The school has a training restaurant and an event service
Fees	▶ No tuition fees for program of the first level ▶ Second level from \$3,000 USD to \$3,450 USD	▶ Possibility for the student to be sponsored by a company ▶ \$600 USD per year	▶ RP 6.000.000 (around USD 700 per semester) all inclusive (books, uniform....)	▶ Tuition fees for the local students: from \$320 USD to \$630 USD ▶ Caribbean Student from \$4,805 USD to \$14,085 USD ▶ Extra-regional student from \$8,805 USD to \$26,085 USD	▶ Local student \$204 USD in Average ▶ International Student: \$1,175 USD in average

Heart Trust NTA, Jamaica



Information on Heart Trust NTA	
History & Location	<p>The Heart Trust National Trust Agency is a public institution which proposes programs in several sector such as tourism, commercial, industries among others</p> <p>The Culloden vocational centre and the Runaway Bay Hotel Training Institute are the 2 main facilities for tourism and hospitality programs</p> <p>The Culloden centre is located on the south cost of Jamaica in a growing touristic area and the Runaway Bay hotel is located in a seaside town on the north cost of Jamaica</p>
Management and operation of the school	<ul style="list-style-type: none"> ▶ The Heart Trust NTA is a public institution offered by the government of Jamaica ▶ It is financed by the 3% taxes on the companies exceeding USD14.444 per month of payroll ▶ The agency has several facilities around the country specialized in different sector or degree type
Programs	<ul style="list-style-type: none"> ▶ The HEART Trust/NTA is the leading trainer and provider of human resources in the hospitality sector, either through on-the-job training or through the academies, vocational training centers and special programs in Jamaica ▶ The academy proposes full-time and part-time programs ▶ Programs are created to prepare working age Jamaican to work in the Jamaican hospitality industry: <ul style="list-style-type: none"> ▪ Hospitality services ▪ Food preparation ▪ Front office agent
Partnership and association	<ul style="list-style-type: none"> ▶ Partnerships with: <ul style="list-style-type: none"> ▪ World international skills ▪ International Labor Association ▪ Jamaica Employers Federation ▪ ICT4D Jamaica (association of promoting the use of the information and communication technology) ▪ Ministry of Education, Jamaica ▪ Human Resource Management Association of Jamaica
Training hotel and restaurant of the school	<ul style="list-style-type: none"> ▶ The agency owns a training hotel called Runaway Bay Hotel since 1986 ▶ This facilities offers programs of operational services on site ▶ The hotel proposes 56 rooms, a restaurant, a bar, a piano bar, a golf, a swimming pool, a gymnasium, a gift shop and conference facilities ▶ Room rates from USD 88 to USD 195
Prices of the programs	<ul style="list-style-type: none"> ▶ No tuition fees for the Heart programs – level 1 ▶ Tuition fees for the programs level2: from USD 3.000 to USD 3.450

Sources: <http://www.heart-nta.org/>; <http://www.runawayheart.com/jm>

Ecole Paul Dubrule, Cambodia



Information on Ecole Paul Dubrule	
History & Location	Inaugurated in 2002 by the co-founder of Accor, Paul Dubrule, the school aims to provide a professional and international training in hospitality and tourism. The school is located at 6 km of Siem Reap, the capital of the Siem Reap Province and the main touristic destination of Cambodia.
Management and operation of the school	<ul style="list-style-type: none"> ▶ This school is a non governmental organization (NGO) ▶ The school funds its activities thanks to private donation, tuition fees and the incomes of the training hotel and restaurants as well as the Khmer cooking courses ▶ The foundation Accor provide the school with some financial help ▶ The school is training 200 students per year (50 cooking students, 20 students in tourism, 50 students in hospitality, 40 students in F&B and 40 student in Bakery)
Programs	<ul style="list-style-type: none"> ▶ Programs are available for tourism, hospitality and F&B services ▶ The duration of the program is one or two years according to the certificate wished by the student ▶ The student has the chance to receive an academic and practical training ▶ The school proposes also short courses for professionals who desire to enhance one of their abilities such as English, French, management skills, basic techniques of reception
Certification and association	<ul style="list-style-type: none"> ▶ The institute created a large number of partnerships with professionals of hospitality and tourism, other schools of tourism and hospitality and foundations such as Accor, the foundation Paul Bocuse (France), le Lycée d'hôtellerie et de tourisme de Saint Quentin en Yvelines (France), The foundation Mérieux (France), the school Lenotre (France) and much more ▶ Partners provide internships for student and help the management of the school to update the programs to fulfill the needs of the local and international tourism businesses
Training hotel and restaurant of the school	<ul style="list-style-type: none"> ▶ The school provides one training hotel and two restaurants ▶ The hotel offers 4 guests rooms from USD 20 to USD 35 the night ▶ The café and the jardins des délices are the two training restaurants where the students can practice their specialization
Prices of the programs	<ul style="list-style-type: none"> ▶ Possibility for the student to be sponsored by a company ▶ USD 600 per year per student

Sources: Ecole Pierre Dubrule Website, <http://www.ecolepauldubrule.org>



Sekolah Tinggi Pariwisata Bali Tourism Institute, Bali

Information on Bali Tourism Institute	
History & Location	<p>The Bali Tourism Institute has been created in 1972 by the assistance of the United Nations Development Programme (UNDP) and was upgraded as university 1993. It is located in a seaside touristic area, Nusa Dua.</p> <p>The institute is a training facility for hospitality and tourism professionals as well as a research facility for tourism development and sustainable tourism.</p>
Management and operation of the school	<ul style="list-style-type: none"> ▶ This tourism institute is managed and financed by the ministry of Tourism and Culture of The Republic Indonesia. ▶ The UNWTO, The ILO, The United nation ESCAP, UNDP support the institute ▶ Each year the school graduates 300 students
Programs	<ul style="list-style-type: none"> ▶ The institute proposes a bachelor in tourism management as well as several other degrees in <ul style="list-style-type: none"> ▪ Tourism management ▪ Hospitality business ▪ F&B ▪ Spa ▪ Tour operator ▪ MICE and events management ▶ They have 3 departments (tourism, hospitality and travel)
Certification and association	<ul style="list-style-type: none"> ▶ The institute is member of the <ul style="list-style-type: none"> ▪ International Hotel and Restaurant Association (IHRA) ▪ Pacific Asia Travel Association (PATA) ▪ Persikaran Hotel and restaurant Indonesia (PHRI Indonesia) ▪ Indonesian Hotelier Association (IAPINDO I.H.A) ▶ And has developed partnership with Bali Hotel Associations (BHA), Bali Tourism Board, Indonesia Tour Guide Association, Tourism Training Department Association (TTDA), Indonesia Hotel House Keeper, Bali Spa and Wellness Association (BSWA), Bali Culinary Professional (BCP), International Culinary Association (ICA)
Training hotel and restaurant of the school	<ul style="list-style-type: none"> ▶ The training hotel is the Langon Bali Spa resort located next to the institute. ▶ It offers to guests 10 rooms, 4 junior suites, 3 seniorsuites, a restaurant, a swimming pool and a spa ▶ The average rates of the rooms and suites: from USD 60 to USD150
Prices of the programs	<ul style="list-style-type: none"> ▶ RP 6.000.000 (around USD 700 per semester) all inclusive (books, uniform....)

Sources: Bali Tourism institute, <http://www.stpbali.ac.id>

Barbados Community College, Barbados



Information on Barbados community College	
History & Location	<p>The community college was created in 1968 by the parliament of Jamaica in order to provide a post secondary-school. It offers education degrees in several sectors such as commerce, tourism, fine art, natural sciences</p> <p>The tourism institute is located in the Pommarine hotel in Hastings on the coast near the capital of Barbados, Bridgetown.</p> <p>The mission of the institution is "to promote excellence in hospitality and tourism through quality education, training and service".</p>
Management and operation of the school	<ul style="list-style-type: none"> ▶ The College is administered by a Board of Management consisting of nine members, under a Chairman, appointed by the Minister of Education. The Board meets on the first Wednesday of every month to manage, conduct and supervise the activities of the College and the facilities, enquire into and adjudicate upon disciplinary charges against students or members of the college staff ▶ The College Planning and Advisory Committee is in charge of all aspects of College life and makes recommendations designed to improve the overall operations of the College. ▶ Advisory committees are in charge of the development of the programs and are composed of the staff of each program section ▶ The tourism institute is a joint venture between the European Union and the Government of Barbados ▶ Funded through the fees of the program, the revenue of the hotel and the government of Barbados
Programs	<ul style="list-style-type: none"> ▶ The tourism institute proposes full-time bachelor of science programs in tourism and hospitality management, culinary arts, hospitality studies, tourism and travel, catering and part-time programs in F&B, reception, airport operation, Caribbean tourism (hospitality services according to the different cultures of the region)
Certification and association	<ul style="list-style-type: none"> ▶ The tourism institute is working in collaboration with diverse associations and other tourism institutes: <ul style="list-style-type: none"> ▪ Caribbean tourism industry standard projects ▪ Organization of American States ▪ Caribbean program for economic competitiveness ▪ Caribbean tourism organization ▪ Canadian international development agency ▪ U.S agency for international development ▪ European Union ▪ Tobago hospitality institute ▪ Trinidad hospitality institute
Training hotel and restaurant of the school	<ul style="list-style-type: none"> ▶ The Pommarine training hotel was created in 1997 ▶ The hotel is a fully integrated training structure with classrooms, kitchens, laboratories, resource center (library and computer room) ▶ The hotel proposes 20 rooms and 1 apartment; 2 two restaurants; a golf, a swimming pool and tennis courts ▶ The average rates of the hotel rooms are from USD 106 to USD 185 the night
Prices of the programs	<ul style="list-style-type: none"> ▶ Fees applied to the programs depend on the origin of the student ▶ Local student fees: USD 320 the first year, USD 485 the second year, USD 630 the third year ▶ Regional Student (Caribbean): USD 4.805 the first year, USD 9.455 the second year and USD 14.085 the third year ▶ Extra-regional Student (International): USD 8.805 the first year, USD 17.455 the second year and USD 26.085 the third year

Sources: <http://www.bcc.edu.bb/>; <http://www.pommarine.com>



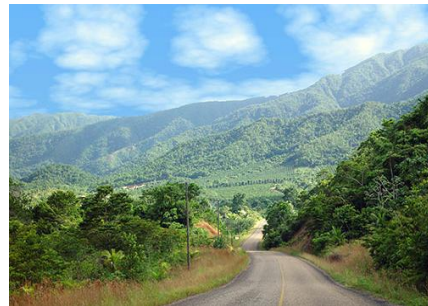
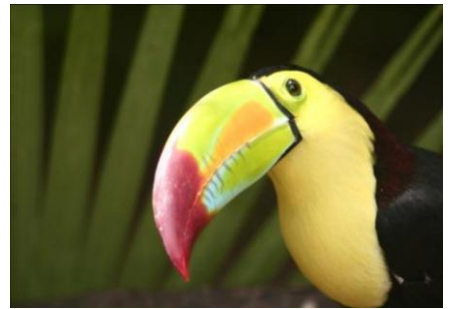
Tobago Hospitality & Tourism Institute, Tobago

Information on THTI	
History & Location	THTI was created in 1996 by the National Government and the Trinidad and Tobago Hotel and Tourism Association (TTHTA) Its is located on the south of Trinidad and Tobago near the international Airport
Management and operation of the school	<ul style="list-style-type: none"> ▶ The institute was developed in 1996 thanks to a 2 millions Dollars grant from the Inter-American Development Bank ▶ The programs were created in collaboration with the tourism, education and governmental stakeholders ▶ From 2003, the facility was funded by the Tobago House of Assembly and in 2005 they also assumed the management role of the school. ▶ In 2006, the school changed its name to THTI and became a private institution ▶ It is now funded by the tuition fees and support from international organizations and the government ▶ They train 200 to 300 students each year
Programs	<ul style="list-style-type: none"> ▶ The school proposes programs of 2 years training in: <ul style="list-style-type: none"> ▪ Culinary arts ▪ Hospitality management ▪ Food and beverage operation ▪ Tourism studies ▶ The school offers also short courses to enhance skills in particular domains such as languages, food preparation, tour guiding, accounting, event management, F&B services
Certification and association	<ul style="list-style-type: none"> ▶ Partnership with tourism and hospitality businesses of Tobago ▶ They are registered with the Accreditation Council of Trinidad and Tobago (The association of quality assurance of education programs in Trinidad and Tobago)
Training hotel and restaurant of the school	<ul style="list-style-type: none"> ▶ The school offers a training restaurant with professional kitchen and an auditorium where functions can be organized ▶ The restaurant is open every day for lunch and diner ▶ The restaurant offers also a catering service for events
Prices of the programs	<ul style="list-style-type: none"> ▶ Local student: USD140 persemester, laboratory: USD11, annual fee : USD 30, insurance fee: USD 23 ▶ International Student USD 875 persemester, laboratory: USD 210, annual fee: USD 50, insurance fee: USD 40

Sources: <http://www.bcc.edu.bb/>; <http://www.pommarine.com>

NATIONAL SUSTAINABLE TOURISM MASTERPLAN FOR BELIZE 2030

National Tourism Sustainability and Quality Assurance Macro Program



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National Tourism Sustainability and Quality Assurance Macro Program

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National Tourism Sustainability and Quality Assurance Macro Program

The Sustainability and Quality Assurance Macro Program comprises of programs directed at raising the quality standards of the tourism service offering in order to reach international market demand standards and assure sustainable development of tourism economic resources.

There are three programs described:

1. Standards and quality management
2. Training and capacity building
3. Sustainable tourism development

The Standard and quality management section aims to raise the bar in minimum standard of tourism service delivery by increasing tour guide and tour operator licensing minimum requirements as a short term goal. In a second phase, and a long term approach, to raising quality standards it programs for an Integrated Tourism Quality Management systems where all stakeholders (public, private, civil society) participate in continuous quality improvements to the sector.

The training and capacity building program responds to the need of professionalizing the tourism human resources by addressing the quality of training and degree programs available in Belize. As a means of a long term solutions it envisions the creation of Hospitality Polytechnic Institute as a center of excellence for tourism hospitality training and tourism sustainable development research.

The sustainable development program provides the framework that will ensure the NSTMP maintains a balance of three pillars of sustainable development: social accountability, environmental conservation and economic prosperity. The program proposes mechanisms to address resource management and appropriate land use allocation while maintaining social and environmental safeguards and finding pro-poor mechanisms to link vulnerable groups to the tourism economic value chain.

1.1 Program for tourism standards and quality management

Gaps identified – Diagnostic

The results of the tourism sector diagnostics showed that there are considerable gaps and inconsistencies in the delivery of quality tourism services, low perception of cost-benefit and a lack of strong regulatory framework and jurisdiction controlling the quality offered to tourists by the tourism value chain components and tourism operators.

- ▶ **Transportation:** Low quality of services offered by tourism transportation means such as bus, taxi, boats, ferries, tender boats. Furthermore, tourist transportation does not come up to international safety standards
- ▶ **Accommodation:** Inconsistencies in quality tourism services and facilities and lack of standardization of hotel categories. Accommodation facilities are generally family-run hotels and guesthouses and tend to be of low capacity.
- ▶ **Food & Beverage:** Insufficient restaurant facilities of international standards and small quantity of high quality establishments concentrated in few areas. Furthermore, only a few food and beverage facilities come up to international food and safety hygiene standards.
- ▶ **Handicraft:** Very few handicraft shops and inefficient commercialization of traditional products. Furthermore, products offered are mostly of foreign origin and of poor quality.
- ▶ **Leisure activities:** Scarce offer of leisure activities and poor safety standards for the properties/sites and equipments.
- ▶ **Tourism assets:** Low level of investment in preservation efforts and ineffective visitor management systems of tourism assets which hinders sustainable usage of the assets. Furthermore, general lack of services up to international safety standards in terms of emergency response and first aid.
- ▶ **Tour Guides:** Lack of professional tour guides with certified specialist knowledge and fields of interest. Lack of foreign language knowledge to cater for an international clientele.

In order for the tourism industry in Belize to grow and attract a higher quality tourism market it is important to maintain a balance between tourism satisfaction and local tourism industry satisfaction approach while addressing solutions to the service delivery quality gap. Furthermore, the overall qualitative improvement of tourism destinations and their assets and services will improve Belize's competitiveness as an excellent tourism destination and set the stage towards the development of a world-class destination.

Vision 2030

By 2030 Belize will offer tourism services and facilities that are compliant with national and international quality standards, and this will attract and please a mid/high-end clientele, which will appreciate the adequate price-value ratio for services and facilities they consume.

Description of the program

The "Program for tourism standards and Quality Management" suggests a participatory approach to finding common ground solutions that improve tourist satisfaction ratings and customer loyalty without hindering the economic growth potential of tourism business. The program consists of the following sub-programs:

- ▶ **Sub-program for Tourism Operational standards and licensing** will devise new tour guide licensing categories and requirements, create tourism operational guidelines minimum

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standards and revise current licensing requirements. The program aims to increase income generating potential of the tourism sector through improving overall service standards, legislation mechanisms and support services.

- ▶ **Sub-program for Tourism Integrated Quality Management (IQM) System and Certification** is a long-term approach for continuous improvement of service quality delivery and is subject to constant monitoring and multi-stakeholder cooperation and commitment in finding and implementing solutions which will raise the bar, standardize and regulate tourism operations service delivery.

Lead stakeholders

MTCAC should develop the standard and quality policies and regulations in conjunction with the local tourism stakeholders while BTB undertakes the executive task of enforcing quality standards and the operational licensing.

Objectives

The objectives of the tourism standards and quality management sub-program are:

- ▶ To improved visitor satisfaction by reaching international quality standards of Belize's tourism services and facilities
- ▶ To increase Belize's tourism service competitiveness by ensuring tour guides employed in Belize tourism industry are certified and well trained
- ▶ To position Belize as a World Class destination growth through the implementation of an effective IQM system that balances environmental considerations, socio-economic development, and maximum participation in reaching the common goal.
- ▶ To enhance tourism income by investing in the embellishment, modernization and restructuring of tourism facilities and increasing high-end/luxury facilities.

Milestones

Review Years	Milestones
2015	<ul style="list-style-type: none"> ▶ Tour guide licensing category and minimum requirements implemented. New specialty license category added. ▶ Revision of tourism operational guidelines started
2020	<ul style="list-style-type: none"> ▶ New specialty tour guide category added ▶ New tourism operator license requirements implemented ▶ Commence design of IQM system
2025	<ul style="list-style-type: none"> ▶ New specialty tour guide category added ▶ Launch of IQM system
2030	<ul style="list-style-type: none"> ▶ New specialty tour guide category added ▶ Revision of effectiveness and adjustment to business model of IQM system

National Tourism Sustainability and Quality Assurance Macro Program

Proposed subprograms and projects

1.1.1 Sub-program for Tourism Operational standards and licensing	
Description and projects	Time frame
<p>Devise new tour guide licensing categories and requirements, create tourism operational guidelines minimum standards and revise current licensing requirements. The program aims to increase income generating potential of the tourism sector through improving overall service standards, legislation mechanisms and support services.</p> <p>Tour guide licensing will not be fully implemented right away given the complexities of creating each specialty capacity building programs and certifications mechanism. At the same time they will not remain current forever, that is why a revision of current and addition of new categories is envisioned in the program, nevertheless, it should not be just one category to be added, but as many as are demand driven and ready to be implemented. It is encouraged that revisions and updates be launched in three to five year cycles.</p> <p>► Project 1: Revise current tour guide licensing categories and minimum requirements. Create a multiple layers of tour guide licenses scheme that responds to the complexities of tour guide activities and differences in expertise requirements and that will facilitate jurisdiction of guidance activities and will raise the bar on tour guiding.</p> <ul style="list-style-type: none"> • Create two types of general licenses that will distinguish between a guide by trade and a naturalist guide: <ol style="list-style-type: none"> <u>National Tour Guide:</u> This license will allow tour guiding across the country subject to guide specialty restrictions. Minimum requirements: <ol style="list-style-type: none"> Secondary School – Up to stage 4 Tour guide course certificate First aid and CPR certificate Search and Rescue certificate <u>Native Tour Guide:</u> This license will be restricted to certain areas where natives from the area demonstrate to have an advantage given their knowledge and insight of the area. Minimum requirements: <ol style="list-style-type: none"> Able to read and write Tour guide course certificate First aid and CPR certificate Search and Rescue certificate • Create multiple specialty licenses and ranking levels. A needs assessment of specialty licenses needs to be conducted and mechanisms of tour guide training and certification devised. <ol style="list-style-type: none"> <u>Specialty licenses:</u> Licenses according to field of expertise guide has demonstrated is capable of conducting. Such as, but not exclusive to: <ol style="list-style-type: none"> <u>Traditions and Culture:</u> General city/town/village tours <u>Archeological Sites:</u> Specific by archeological site <u>Inland Adventure Sports:</u> Specific by type of sports mastered (ie caving, hiking, bird watching, canopy, etc) <u>Water Adventure Sports:</u> Specific by type of water activity mastered (diving, snorkeling, rafting, kayaking, fishing, etc) <u>Ranking levels:</u> Create levels of expertise subject to number of years of guiding and provided levels of recommendations of previous employers. This will allow differentiation of salary ranges by rank. Year's requirement will be determined by specialty. <ol style="list-style-type: none"> <u>Enter level:</u> 1st year tour guide <u>Junior level:</u> 2 to 5 years depending on specialty <u>Senior level:</u> 3 years and above depending on specialty <u>Certifications:</u> A list of approved national and international certifications needs to be created (ie PADI) and/or device a mechanism of training with local and 	<p>Project 1 Starting date: 2012 Implementation: 4 years Revision every 5 years</p> <p>Project 2 Starting date: 2015 Implementation: 4 years</p> <p>Project 3 Starting date: 2018 Implementation: continuous</p>

1.1.1 Sub-program for Tourism Operational standards and licensing

- or international pre-approved partners (ie, NICH, Association of Caving Instructors)
- Conduct stakeholder meetings to validate suitability of new licensing scheme in the Belize context and revise where applicable.
- Revise and update Tour Guide Regulation policy to reflect new licensing scheme.
- Launch new licensing system in a phased manner according to product development readiness, market needs and certification programs availability. Revisions, adaptations and additions of new specialty licenses should be launched every three to five years.
- ▶ **Project 2: Develop tourism operations guidelines and minimum standards.** Develop minimum operational standards for the tourism industry and validate applicability to the Belizean context. These guidelines should become minimum requirements for tourism operations and licensing approval.
 - Benchmark regional guidelines and revise current existing guidelines in Belize.
 - Develop new specific operational guidelines by type of tourism operation applicable to the Belizean context.
 - i. Accommodation services
 - ii. Tour operators general and specialized operations (ie Adventure sports)
 - iii. Travel agency services
 - iv. Tourism site/attraction
 - v. Tourism transportation services
 - vi. Food & Beverage services
 - vii. Special feature for Community Tourism Operations
 - Scope to be covered within the guidelines:
 - i. Statutory obligations: Fulfillment of all statutory obligations were applicable
 - ii. Commercialization: Minimum requirements of information delivery to customers and contractual obligations
 - iii. Services provided:
 - a. Requirements of an operations plan
 - b. Requirements for safety and security procedures
 - c. Requirements for disaster preparedness and emergency plan
 - d. Requirements for tour guides
 - e. Requirements for food security
 - f. Limits and obligations of activities
 - iv. Infrastructure and equipment:
 - a. Requirements for infrastructure maintenance plans
 - b. Requirements for minimum equipment standards and maintenance plans
 - v. Quality labeling requirements: Specifically for hotel classification system
 - a. service standards
 - b. physical standards
 - c. safety standards
 - Validate feasibility of operator compliance with stakeholders before implementing them as a general rule for licensing requirements and renewal. Methods of validation should be stakeholder workshops, pilot projects and a combination of both.
- ▶ **Project 3: Revise current tourism operator licensing procedure and requirements.** Request proof of compliance to guidelines when applying and renewing operator licenses as a requirement. Develop a mechanism validating compliance to guideline

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1.1.1 Sub-program for Tourism Operational standards and licensing

<p>requirements:</p> <ul style="list-style-type: none"> • Conduct an in-depth National Hotel asset audit and inventory. In a second order conduct an in-depth tour operator asset audit and inventory. • Revise and update tour operator licensing regulation policy to add new guidelines as minimum requirement standards for licensing approval and renewal. • Revise and update Hotels and Tourist accommodation act to add new guidelines as minimum requirement standards for licensing approval and renewal. • Develop a score system to rate level of compliance of operators/hotels to new guidelines. Allow a grace period for operators to comply and offer various support mechanisms to aid in the process of becoming compliant. • Train inspectors in the specifics of the tourism guidelines and its correct application. Automate the procedure as much as possible to avoid corruption. • Partner with non-partisan agency for or hire a body of inspectors and conduct timely audits to licensed operators for compliance of minimum requirements. • Devise a penalty mechanism and revoke of license when appropriate. 	
Lead Responsible	Strategic Partners
BTB- Office of the Registrar of Hotels and Tourists Accommodation & Quality assurance department Belize Tour guide licensing committee Belize Tour operator licensing committee	<p><i>Tour guide Licensing:</i> Ministry of Education and Youth, BTIA, BTOA, BCIA, BTGA, NGOs (such as Audubon Society), insurance companies</p> <p><i>Guidelines:</i> MTCAC, Ministry of Health, NICH, BTIA, BTOA, insurance companies</p>
Destinations for implementation	
Nationwide	
Estimated cost (USD)	Potential financing sources
USD 1,810,000	Licensing fees and fines, Government funds and multilateral donors

1.1.2 Sub-program for Tourism Integrated Quality Management (IQM) System and Certification

Description and projects	Time frame
<p>Create a Belize tourism Integrated Quality management (IQM) takes into account, and have a favorable impact on the activities of tourism professionals, tourists, the local population and the environment (that is natural, cultural and manmade assets of the destination). Along with achieving global quality standards the goal is also to reach global sustainable tourism criteria on all levels relating to destination and product development to be reached in Belize.</p> <p>► Project 1: Define an Integrated Quality Management (IQM) System approach. Create an IQM participatory system with the aim at raising the quality standards of the entire tourism value chain through a continuous process of planning, implementation, reviewing and corrective measures. In order to create this system commitment from multiple stakeholders and a clearly defined process is needed. Also, this system has to be aligned and linked with commercial efforts done at the marketing chapter with Tourism Product Clubs, as these are voluntary and commercial oriented quality systems for tourism. Key planning considerations are:</p> <ul style="list-style-type: none"> • <u>Dynamics of partnerships:</u> Who will be the lead authority driving and implementing changes, strategic partners and division of roles between partners • <u>Dynamics of design:</u> Define strategies and policies required as drivers of 	<p>Project 1 Starting date: 2020 Implementation: 3 years</p> <p>Project 2 Starting date: 2022 Implementation: continuous</p> <p>Project 3 Starting date: 2023 Implementation:</p>

1.1.2 Sub-program for Tourism Integrated Quality Management (IQM) System and Certification

<p>change in human resources, natural resources, quality of life, cultural heritage, sustainability criteria etc.</p> <ul style="list-style-type: none"> • <u>Dynamics of implementation</u>: Lay the foundation for the implementation of corrective measures by the various public and private providers both within and outside the system. • <u>Dynamics of monitoring</u>: define sets of indicators by which partners involved and lead authority will evaluate satisfaction of the various target groups, integration into the community and conservation of resources from the point of view of sustainable development. • <u>Dynamics of evaluation and adjustment</u>: define process of analyzing lessons learned from corrective actions and means scaling up to other levels of the value chain. It this ongoing repetition that causes the system to operate as an loop of continuous quality improvement. <p>► Project 2: Tourism business adhesion and certification of the IQM system. Create an accreditation system for business that support the IQM system and adopt the established best practices. The goal is to motivate the business community to adhere to homogenous quality levels by recognizing and distinguishing business against its competitors</p> <ul style="list-style-type: none"> • Define types of tourism business to be certified, such as: <ol style="list-style-type: none"> i. Tourism products ii. Tourism destinations iii. Authentic commercial products (handicraft, consumable products, etc) iv. Tourism services (accommodations, restaurants, tour operators, etc.) • Define services and benefits: <ol style="list-style-type: none"> i. Create best practices manuals by type of tourism business ii. Define synergies with marketing 'Product Clubs' program. iii. Define instructional manuals for adhesion to the system by line of business iv. Define technical assistance tools and modules of cooperation. v. Define benefits of adhesion to the system by line of business. • Define certification procedure: <ol style="list-style-type: none"> i. Design levels of certification and its requirements ii. Define certification process mechanism and support tools iii. Design internal communication and promotion plan. <p>► Project 3: Implement the Tourism Quality Management System of Belize. Once the business model and certification program has been defined a pilot program should be carried out before final implementation of the system.</p> <ul style="list-style-type: none"> • Design a pilot project to test the validity of the system with at least 1 destination and 10 businesses that represent the typologies contemplated in the plan. • Create and train a body of 'quality coaches' familiar with the system that will conduct future performance evaluations and maintain quality control of the system. Devise anti-corruption and transparency mechanisms. • On a voluntary basis implement the system across the country in a prioritized and phased manner: <ol style="list-style-type: none"> i. <u>Awareness campaign</u>: Launch a full scale awareness campaign to tourism stakeholders of importance and benefits of the quality management system ii. <u>Training phase</u>: Provide companies with the appropriate tools and training programs specifically linked to the understanding and implementation of the standards and quality system. 	<p>continuous</p>
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National Tourism Sustainability and Quality Assurance Macro Program

1.1.2 Sub-program for Tourism Integrated Quality Management (IQM) System and Certification	
<ul style="list-style-type: none"> iii. <u>Adaptation phase</u>: Offer aid packages for adjustment to system and allow a grace period of adaptation. iv. <u>Formalize certification system</u>: Implement certification and recognition of business adhering to the system and conduct performance evaluations. v. <u>Link with Product Club marketing program</u>: Formalize additional recognition and benefits of those that participate in the product club program and obtain quality certification. 	
Lead Responsible	Strategic Partners
BTB – Quality assurance department MTCAC BTIA	MTCAC, Local governments, Ministry of Economic Development, Ministry of Works, Ministry of Economic Development, Ministry of Natural Resources and the Environment, PACT, NGOs, BHA, BTOA, BCIA, BTGA
Destinations for implementation	
Nationwide: Phasing by key priority tourism areas	
Estimated cost (USD)	Potential financing sources
USD 5,150,000	Joint venture with private sector, ministries and local government Self generated fees through certification program

1.2 Program for Tourism Training and Capacity Building

Gaps identified – Diagnostic

The results of the tourism sector diagnostics showed that currently Belize's human resources are insufficiently trained in hospitality operational and management skills which is a major constraint in meeting international tourism market standards and in competing to attract powerful source markets. Further gaps identified were:

- ▶ Unstructured tourism educational and training programs arising from courses which do not meet the expectations and requirements of the tourism industry. These expectations and requirements would include: operational and management skills for hotel, hospitality services, tour guide, tour operators, food and beverage facilities, tourism assets and other skills required to offer supporting tourism services.
- ▶ Low capacity in foreign language skills
- ▶ Low management skills especially in management and financing
- ▶ Few certification and professional degree programs resulting in a lack of qualified staff and/or unemployable graduates
- ▶ Insufficiently trained tour guides in terms of specific knowledge, first aid and emergency response.

In order to promote sustainable tourism development in a high-end tourism destination, high quality standards are a prerequisite. The development of sustainable tourism in Belize should include the capacity development of skills and strive for higher quality educational and training opportunities for human resources operating in the tourism industry.

Vision 2030

By 2030, Belize will have developed its training and capacity building institutions providing diverse courses training operational and management staff that come up to the needs and requirements of the tourism industry. These human resources will be providing excellent services that will directly or indirectly lead to an enhanced visitor experience.

Description of the program

The "Program for Tourism Training and Capacity Building" addresses the gap in qualified tourism human resources through the revision of vocational training and tourism management curriculums and institutions, revision of tour guide training accreditation programs and the creation of a centre of excellence in tourism training and hospitality standards. The program consists of following sub-programs:

- ▶ **Subprogram for Hospitality Tourism Training Certifications and Degree Courses** develops the human resources' operational and management skills required by the local tourism industry in terms of international standards with an emphasis in developing practical training opportunities relevant to the Belize context. The goal is to increase the quality of tourism services management and delivery in the tourism sector and will therefore directly result in an enhanced customer experience and stimulate growth of the local tourism economy.
- ▶ The **Sub-program for Tour Guide Training and Accreditation** enhances skills among the Belize network of National Tour Guides through revision and updating of the general accreditation training modules, addition of safety and security certification modules and developing a mechanism to train and certify in specialty activities.

National Tourism Sustainability and Quality Assurance Macro Program

- ▶ The Sub-program for **Development of the Hospitality & Tourism Polytechnic Institute of Belize** creates a facility that embodies all elements of the National Sustainable Tourism Master plan's Sustainability and Quality Assurance program strategies: tourism operational safety and security standards, integrated tourism quality management, quality human resources capacity building, and sustainable tourism stewardship. Its core functions will be to operate a hospitality school, vocational training programs, an eco-lodge and sustainable tourism research centre. Although there are already business and tourism universities in Belize, there is still a gap in terms of the scope of training and real needs of the tourism sector.

Objectives

- ▶ To enhance the destinations' competitiveness by increasing effectiveness and completeness of the capacity building local offer
- ▶ To increase the pool of trained and skilled tourism work force
- ▶ To increase visitor satisfaction through enhancing quality of Belizean tourism services
- ▶ To improve income generation potential of employees and staff of the tourism industry

Lead stakeholders

BTB (Quality Assurance Department) in cooperation with MTCAC should develop certification schemes, strengthen training and capacity building institutions and foster the development of new training programs. All this should be done in partnership with the local tourism industry. Together they could create a tourism capacity building committee which would comprise of BTB Quality representatives and other public and private sector representatives.

Milestones

Review Years	Milestones
2015	<ul style="list-style-type: none"> ▶ Operational hospitality and tourism management curriculum revision completed and training institutions identified ▶ Pre-requisite courses for National Tour Guide licenses revised and implemented ▶ First set of specialty tour guide activities certification programs implemented ▶ Inauguration arrangements for the Hospitality and Tourism Polytechnic vocational school and hotel training facility
2020	<ul style="list-style-type: none"> ▶ Second set of specialty tour guide activities certification programs implemented ▶ Start planning for first satellite Hospitality and Tourism Polytechnic vocational school and hotel training facility
2025	<ul style="list-style-type: none"> ▶ Third set of specialty tour guide activities certification programs implemented ▶ Operations of first satellite Hospitality and Tourism Polytechnic vocational school and hotel training facility ▶ Start planning for second satellite Hospitality and Tourism Polytechnic vocational school and hotel training facility
2030	<ul style="list-style-type: none"> ▶ Fourth set of specialty tour guide activities certification programs implemented ▶ Operations of second satellite Hospitality and Tourism Polytechnic vocational school and hotel training facility

National Tourism Sustainability and Quality Assurance Macro Program

Proposed subprograms and projects

1.2.1 Sub-program for Hospitality Tourism Training certifications and degree programs	
Description and Projects	Time frame
<p>This sub-program will develop the human resources' operational and management skills required by the local tourism industry in terms of international standards with an emphasis in developing practical training opportunities relevant to the Belize context. The goal is to increase the quality of tourism services management and delivery in the tourism sector and will therefore directly result in an enhanced customer experience and stimulate growth of the local tourism economy. Training must be demand driven as it is expected that in the next 20 years there will be an influx of human resources from other sectors</p> <p>► Project 1: Operational hospitality and services continuous training. The project aim is to ensure Belize offers on a consistent basis and in terms of international standards of quality certificate programs and apprenticeships that cover all relevant topics of tourism hospitality operations. In order to strengthen current tourism hospitality training programs and devise new ones the following steps should be carried out by a special committee comprised of public and private sector that will proactively address the capacity building needs and devise solutions:</p> <ul style="list-style-type: none"> • Assessment of training necessities by sector, including requests from visitor survey and national and international tourism industry. This assessment should also include an analysis of the training provided by vocational and secondary schools to understand where the gap is between the institutions conducting the training and the needs of the industry. • Once gaps are identified a program should be established to help improve the curriculum of these training institutes and identification of new training modules, its requirements, possible partner training institution, and national and international development support mechanism. • Relevant sectors/subjects to assess include: <ul style="list-style-type: none"> i. <u>Hospitality training</u>: Front office operations and Housekeeping; Food and beverage operations: wine and bar, waitressing, cooking and pastry; customer relations and communication skills. ii. <u>Tourism support services</u>: Spa & massage services, handicraft design and sales, events management, tour operations, information technology, transportation, food & beverages, recreation & entertainment. iii. <u>Foreign language</u>: Multi-lingual levels in the tourism industry, including proper spoken Spanish and English and other European languages such as French and German. • Creation of a national certification system / international co-certification. Devise partnerships and agreements with national and international higher level institutions and private sector associations and business that will provide certification programs and apprenticeships and/or internship opportunities. • Design and execute certification curriculums and apprenticeship programs by topic. Prioritize deployment of programs by urgency and ease of implementation. Certificate programs should be designed for new comers to the industry as well as design special refresher courses for those already working in the industry. • Develop a targeted communication plan to attract industry new comers and current business and their personnel. Communicate training possibilities to the tourism sector, e.g. Information distribution over a centralized website that hosts the national certification system program. • Devise a monitoring and evaluation and continuous improvement mechanism for the national tourism hospitality training and certification system and create a stronger connection between these participating training institutes and the private sector to constantly monitor and improve the tourism workforce. <p>► Project 2: Tourism management professional degrees. This project aims to enhance the technical and administrative capacities of human resources new comers</p>	<p>Project 1 Starting date: 2013 Implementation: continuous</p> <p>Project 2 Starting date: 2014 Implementation: continuous</p>

1.2.1 Sub-program for Hospitality Tourism Training certifications and degree programs

and those already working in the Belize tourism industry. In order to reach necessary skills development and appropriate quality service levels the curriculums of current tourism management degrees need to be modified to respond to the tourism model of Belize. Such as in the previous project a similar process should be carried out by a special committee comprised of public and private sector that will proactively address the capacity building needs and devise solutions:

- Assessment of tourism management curriculum programs and industry needs, including requests from tourism business operations and employers - Identification of curriculum requirements and possible educational institution. Some topics to assess:
 - i. Sustainable tourism and alternative energy sources
 - ii. Corporate social responsibility
 - iii. Tourism product development
 - iv. Entrepreneurship and SME start-up
 - v. Tourism leadership skills
 - vi. Tourism marketing and sales
- Devise partnerships and agreements with national and international higher level institutions and private sector associations and business that will provide professional degree programs and apprenticeships and/or internship opportunities.
- Design professional degree curriculums and apprenticeship programs by topic. Prioritize deployment of programs by urgency and ease of implementation. Some relevant courses to consider as first priority topics:
 - i. Management and financing of tourism SME. This degree provides in-depth knowledge on business and management theories and presents various financing possibilities and practical case studies.
 - ii. Tourism marketing and sales training. These trainings will provide training in tourism marketing and sales, illustrating tourism specific case-studies by tourism value chain unit. At the end of the module, the participant will be able to restructure his international marketing and sales strategies and develop a diverse sales portfolio in order to improve his own product sales.
 - iii. Governmental tourism institutions' seminar. These seminars assesses the training requirements of the human resources employed by the tourism public sector and provides directions on how to improve work flows, knowledge and skills to enhance decision making and foster international and national funding possibilities.
 - iv. Tourism Planning and Destination Management: This program aims at providing tourism planning and understanding between the public and private sectors and the civil society to ensure that they work together in the same direction to guarantee a sustainable development and management of tourism destinations.
- Develop a targeted communication plan and incentives to encourage the industry to professionalize the sector through accredited educational programs.
- Devise a monitoring and evaluation and continuous improvement mechanism for the national tourism hospitality training and certification system.

Lead Responsible	Strategic Partners
Tourism Capacity Building committee: comprised of BTB representative(s) and other public and private sector representatives	Ministry of Education University of Belize; Galen University, ITVET and other junior colleges BTIA, BHA, BTOA International cooperation agencies International higher education institutions

National Tourism Sustainability and Quality Assurance Macro Program

1.2.1 Sub-program for Hospitality Tourism Training certifications and degree programs

Destinations for implementation	
Belize National Territory: All Institutions that offer tourism vocational and professional degree programs in Belize	
Estimated cost (USD)	Potential financing sources
USD 1,685,000	Multilateral support Self-financed through student fees

1.2.2 Sub-program for Tour Guide Training and accreditation

Description and Projects	Time frame
<p>This sub-program will enhance capacity skills of Belize network of National Tour Guides through revision and updating of the general accreditation training modules, addition of safety and security certification modules and developing a mechanism to train and certify in specialty activities. The implementation and monitoring of this system will support the new licensing scheme, new product development and long-term sustainability of the tourism industry.</p> <p>► Project 1: Pre-requisite courses for general tour guide license. Given the restructuring of tour guide licensing regulation a revision of the current tour guide accreditation program is needed along with a mechanism to support new prerequisites.</p> <ul style="list-style-type: none"> • <u>General tour guide course:</u> <ol style="list-style-type: none"> i. Evaluation of effectiveness of current tour guide training curriculum and institutions. Include tour guide and tour operator consultation and satisfaction survey. Identify gaps of current program. ii. Benchmark inter-regional and international tour guide training curriculums. iii. Identify key partners and institutions that will impart training modules. iv. Design new National Tour Guide and Naturalist Tour Guide training curriculum and devise a refresher course module. Along with general knowledge of the country and tourism customer service skills emphasis should be made in leadership and crisis management skills, responsible usage of cultural and natural tourism resources, and problem-solving and conflict resolution skills v. Implement new <i>National Tour Guide Accreditation Program</i>. vi. Devise a mechanism to monitor, evaluate and implement continuous improvement to the accreditation curriculum and program. • <u>First Aid and CPR:</u> Identify potential implementation partners and devise an implementation plan of course offering frequency and locations. • <u>Search & Rescue:</u> <ol style="list-style-type: none"> i. Identify types of search and rescue courses needed in Belize (i.e. still water, open water, wilderness) ii. Identify potential implementation partners and devise an implementation plan of course offering frequency and locations. <p>► Project 2: Pre-requisite courses for specialty tour guide license. Given the restructuring of tour guide licensing regulations accreditation of specialty tour guide activity training courses and certification mechanisms need to be devised. Certification training programs should be designed and implemented a year before specialty license requirement is enforced.</p> <ul style="list-style-type: none"> • Identify need of specialty tour guide certification programs. Align with stakeholder consultation and product development needs. • Prioritize list of specialty certification programs that need to be devised based 	<p>Project 1 Starting date: 2014 Implementation: ongoing; revision of current programs and design of new curriculum after 10 years (2024)</p> <p>Project 2 Starting date: 2014 Implementation: ongoing; identification of needs and updates every 5 years</p>

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1.2.2 Sub-program for Tour Guide Training and accreditation

<p>on market needs, ease of implementation and safety and security risks they present.</p> <ul style="list-style-type: none"> Identify key national and international partners and institutions that will impart training modules. Design an implementation plan for specialty tour guide program offering frequency and location. Some pre-identified specialty certification programs needed in Belize: <ul style="list-style-type: none"> i. Archaeological sites: A module per site should be devised. ii. Inland Adventure sports: caving, jungle hiking, bird watching, zip lining/rappelling, horseback riding, etc. iii. Water Adventure sports: cave tubing, kayaking, rafting, scuba, snorkeling, fly-fishing, etc. Devise a mechanism to monitor, evaluate and implement continuous improvement to the accreditation system and training institutions. 	
Lead Responsible	Strategic Partners
BTB – Quality assurance department Belize Tour guide licensing committee	Belize Tour Guide Association Ministry of Education University of Belize; Galen University, ITVET and other junior colleges BTIA, BHA, BTOA International specialty activity certification (ie, British caving association certificate scheme) International cooperation agencies
Destinations for implementation	
Belize National Territory	
Estimated cost (USD)	Potential financing sources
USD 1,165,000	Multilateral support Self-financed through student fees

1.2.3 Subprogram for Development of the Hospitality & Tourism Polytechnic Institute of Belize

Description and Projects	Time frame
<p>The aim is to create a facility that embodies all elements of the National Sustainable Tourism Master plan Sustainability and Quality Assurance program strategies: tourism operational safety and security standards, integrated tourism quality management, quality human resources capacity building, and sustainable tourism stewardship. Its core functions will be to operate a hospitality school, vocational training programs, an eco-lodge and sustainable tourism research centre. Although there are already business and tourism universities in Belize, there is still a gap in terms of scope of training and real needs of tourism sector. This Polytechnic aims to prepare staff students in a vocational and operations oriented way, providing the tools and knowledge required to cover tourism sector needs.</p> <p>► Project 1: Development of a Hospitality and Tourism Polytechnic vocational school and hotel training facility. This institute seeks to establish Belize's premier vocational education institute and a self-sustaining hotel training facility. In Belize there is already pre-existing plans (ie Mesoamerican Tourism Institute of Belize) to carry out such a facility and should be used as a starting point in assessing the feasibility and business plan:</p> <ul style="list-style-type: none"> Starting from the already devised MESO model update the business model and feasibility assessment of the institute taking into account the new 2030 vision and strategies set forth by the National Sustainable Tourism Master plan. Identify strategic partnership schemes and funding sources Revise feasibility of the proposed Guanacaste park site in Belmopan (as suggested by MESO plan) and explore other options. Lobby for government land concession for the project site. Strategically the site should be located in government owned land in order to strengthen government support and contribution to sustainable tourism development. Define products and services to be offered by the institution and hotel training facility and implementation partners. The institution will lend itself for: <ol style="list-style-type: none"> Front & back house training; Tour guide training; Tourism management training; other tourism related services and sustainable tourism research and innovation Once site location has been establish conduct master planning of site and architectural design utilizing green technology and sustainable development principals. Commence development and construction phase. Plan and conduct a nationwide awareness program and international promotional campaign Inaugurate institution and initiate operational phase. Devise a monitoring, evaluation and continuous improvement mechanisms of educational and training program. <p>► Project 2: Expand Hospitality and Tourism Polytechnic vocational school and hotel training facilities. Once the Tourism Polytechnic vocational training hotel and school facility and program has been established and operations have proven successful and economically self-sustainable, then plan the expansion project.</p> <ul style="list-style-type: none"> Identify strategic areas for expansion by market demand (both availability of students and hotel clientele) criteria. Conduct feasibility analysis of identified sites and adapt business model to the site specific needs and requirements. Identify strategic partnership schemes and funding sources per site Lobby for government land concession for the project sites. 	<p>Project 1 Starting date: 2015 Implementation: construction 6months, Stabilized year-5th year of operation Ongoing operation: self-sustaining</p> <p>Project 2 Starting date P2: 2022 Implementation P2: 2024 (first satellite) Implementation P2: 2029 (second satellite)</p>

National Tourism Sustainability and Quality Assurance Macro Program

1.2.3 Subprogram for Development of the Hospitality & Tourism Polytechnic Institute of Belize

- Define products and services to be offered by the institution and hotel training facility and implementation partners.
- Once site location has been established conduct master planning of site and architectural design utilizing green technology and sustainable development principals. Commence development and construction phase.
- Plan and conduct a nationwide awareness program and international promotional campaign
- Inaugurate institution and initiate operational phase.
- Devise a monitoring, evaluation and continuous improvement mechanisms of educational and training program.

Lead Responsible	Strategic Partners
BTB BTIA Mesoamerican Tourism Institute of Belize	MTCAC BHA, BTOA, BTGA Ministry of Education Ministry of Economic Development Beltraide
Destinations for implementation	
Main Institute: Belmopan Regional chapters to be added: Belize City; Stann Creek district; Ambergris Caye.	
Estimated cost (USD)	Potential financing sources
USD 23,500,000	National Sustainable Tourism trust Fund – Seed Capital Government appointed land concession Multilateral Grant/loan Self-sustaining operational income

1.3 Program for Sustainable Tourism Development

Gaps identified - Diagnostic

The industry diagnostics study showed that Belize's sustainable tourism development is challenged by the present conditions of its environmental, economic and social status.

- ▶ Main **environmental challenges** are solid waste management and disposal, dredging infrastructures, accelerated beach erosion, water pollution caused by inadequate waste water discharge, mangrove clearance, poor sewage collection and treatment systems
- ▶ Belize is especially vulnerable to **natural hazards and climate change** experiencing hurricanes, storms and flooding. In addition, rising sea levels pose risks for flooding, inundation, saltwater intrusion, and erosion, which threaten water supplies, infrastructure, and coastal areas.
- ▶ With a recent **poverty level** of 43% and a slow economic growth rate while experiencing a population growth rate approaching 3.7% per annum, there is a serious need for action to be taken to ensure economic growth and the creation of employment opportunities.
- ▶ Major **tourist attractions** visited by cruise visitors are exposed on a daily basis to serious environmental and social negative impacts through the mass tourism activity caused by the cruise industry.

Vision 2030

By 2030, Belize will have found its path towards sustainable tourism development, successfully linking poor and ethnic minority groups to the tourism value chain economic activity, and respectfully using the natural, cultural and manmade tourism resources. The tourism strategies and their implementation will most efficiently and effectively harness the social, environmental and economic benefits provided.

Description of the program

The sustainable development program provides the framework that will ensure the NSTMP maintains a balance of the three pillars of sustainable development: social accountability, environmental conservation and economic prosperity. The program proposes mechanisms to address resource management and appropriate land use allocation while maintaining social and environmental safeguards and finding pro-poor mechanisms to link vulnerable groups to the tourism economic value chain.

The program addresses sustainability issues by proposing the following subprograms:

- ▶ The **Sub-program for Tourism Resources Management and Conservation** aims to identify and qualify an economic value of the resource in order to raise awareness and justify conservation efforts. The subprogram designs a plan to identify and assign an economic value of the tourism resources in order to define limits of change and validate conservation efforts.
- ▶ The **Sub-program for Tourism Land Use Planning and Development Support** aims to create a framework for tourism land use allocation that involves planning with social and environmental safeguarding criteria. The sub-program creates a land use master planning process of tourism zones as a standard for tourism development.
- ▶ The **Sub-program for Pro-poor Tourism and Ethnic Groups Tourism Linkage** supports efforts to identify and support vulnerable groups to benefit from the tourism economic value chain by strengthening the participation through the development of inclusion mechanisms.

National Tourism Sustainability and Quality Assurance Macro Program

Lead stakeholders

The main lead should be taken by BTB's product development department, strengthened by MTCAC. The main task is the analysis of the sustainability indicators and the potential solutions to improving them. Together with the local tourism industry, gaps for pro-poor linkages can be identified. By partnering with local NGO and community/municipality institutions, inclusion mechanisms and solutions can be recognized.

Objectives

- ▶ To foster sustainable usage of tourism resources by creating an over-arching conservation vision and policy to protect resources necessary to the tourism industry and the
- ▶ To secure long term health of the economy through creating a long-term approach to land use planning that will conserve the quality of the fundamental resources as well as encourage high quality tourism in Belize.
- ▶ To alleviate poverty by effectively linking poor and ethnic minority groups to the tourism value chain economic activities
- ▶ To secure local income generation through time by conservation efforts of tourism cultural and natural assets.

Milestones

Review Years	Milestones
2015	<ul style="list-style-type: none"> ▶ Tourism resources identified, mapped and classified ▶ Commission limits of change studies for vulnerable tourism assets ▶ Special sustainable tourism projects initiative support criteria developed and yearly strategy launched
2020	<ul style="list-style-type: none"> ▶ All limits of change indicators have been established for all identified vulnerable tourism assets and monitoring and conservation initiatives in progress. ▶ 5 year review of tourism assets mapping and classification
2025	<ul style="list-style-type: none"> ▶ 5 year review of tourism assets mapping and classification
2030	<ul style="list-style-type: none"> ▶ 5 year review of tourism assets mapping and classification

Proposed subprograms and projects

1.3.1 Sub-Program for Tourism resources management and conservation	
Description of project Projects	Time frame
<p>Creates a conservation ethic in Belize and takes the appropriate steps to effectively conserve and maintain the integrity of tourism resources and in term protects the long term health of the tourism economy. The subprogram designs a plan to identify and assign an economic value of the tourism resources in order to define limits of change and validate conservation efforts. Finally establishes an ongoing commitment to conservation by driving and supporting special projects.</p> <ul style="list-style-type: none"> ▶ Project 1: Identification and mapping of tourism resources. Identify, map and classify in quantitative and qualitative terms the value creating natural, cultural and manmade tourism resources. This needs to be readily available to all tourism agencies and stakeholders. It also needs to be maintained as new resources are identified, 	<p>Project 1: Starting date: 2012 Implementation: revision every 5 years</p> <p>Project 2: Starting date: 2015</p>

National Tourism Sustainability and Quality Assurance Macro Program

1.3.1 Sub-Program for Tourism resources management and conservation

created and consumed.	Implementation: 2020 Duration: continuous
<p>▶ Project 2: Management and conservation of tourism resources: In a collaborate effort between the private sector and the specific asset management agencies work towards conserving the long-term integrity of the tourism assets by:</p> <ul style="list-style-type: none">• Prioritizing tourism assets based on the quantitative and qualitative value and vulnerability status• Identify sources of funding for studies, monitoring and conservation initiatives• Commission a study of the long term effects of existing and anticipated development practices on the top priority tourism resources in question. This can address alternative scenarios for future development and clearly demonstrate to all stakeholders the effects of conservation efforts or the lack thereof could have.• Set limits of change targets and monitoring mechanisms of evaluated resources.• Establish conservation initiatives and development control per identified issue. Formulate and implement the appropriate environmental design and development controls that consider issues such as water quality of the marine environment, tree preservation, development on steep land, disturbed areas, clustering development in existing urban areas and water conservation.• Contribute content and information to the following programs:<ul style="list-style-type: none">i. <i>Land use planning:</i> contribute relevant information of the sensitivity of the tourism asset buffer zone areas in order to create appropriate of land use criteria and standards.ii. <i>Community awareness campaigns:</i> collaborate and provide content in the creation of conservation campaigns and the importance of natural and cultural resources to the future of tourism in Belize. <p>▶ Project 3: Special sustainable tourism projects initiative. Enhance sustainable development long-term commitments by driving and/or supporting special projects aimed to increase public, private and community conservation conscious. Develop criteria of initiatives to support and launch a yearly strategy. Examples of potential projects to initiate/support:</p> <ul style="list-style-type: none">• Maximize the value of government owned land by using it to showcase good practices demonstration projects and early sources of income to fund conservation initiatives.• Establish Fast Track projects that will enhance sustainable development momentum. Create a priority list of 5 projects and take them to the investor market.• Yearly award for outstanding contribution to conservation and sustainable tourism development to private and/or community organizations.	<p>Project 3: Starting date: 2020 Implementation: continuous</p>
Lead Responsible	Strategic Partners
BTB – product development & Quality assurance	Beltraide, PACT, NGOs, BTIA, BTOA, BTGA, BCTA, Ministry of Tourism, Ministry of Natural Resources and the Environment, Ministry of Economic Development, Ministry of Agriculture & Fisheries, Coastal Zone management Authority, Municipal Governments
Destinations for implementation	
Nationwide	
Estimated cost (USD)	Potential financing sources
USD 5,350,000	PACT, Ministry of Natural Resources and the Environment Ministry of Tourism – NSTTF. Multilateral support

National Tourism Sustainability and Quality Assurance Macro Program

1.3.2 Sub-program for Tourism Land Use Planning and development support

Description of project Projects		Time frame
<p>Establishes clear and evenly applied standards for tourism development that consider environmental, social, cultural and economic well being of Belize. Through the creation of a land use master planning process of tourism zones as a standard for tourism development.</p> <p>▶ Project 1: Develop a Land Use Master Plan for new and emerging destinations.</p> <ul style="list-style-type: none">• Create a centralized data base of mapped and demographic data that can be used to base land use plans on scientific data and models that can assess the degree of change that development will affect on the environment. Develop safe guard mechanisms to protect local communities from potential “imported inflation” caused by tourism development as well as inclusion mechanism.• Create clear development standards and design guidelines or <i>Land Use Plan</i> that address the issues of quality and context of tourism development for every tourism designated destination in Belize. These standards, and the processes used to administrate them should be form-based, so that the authenticity of development can be conserved. The land use framework is described in Annex. Land Use Framework• Enforce Land Use Planning by converting categories, building criteria, landscape principles, urbanization criteria, etc. into law. A first set of guidelines for tourism development, according to Land Use Planning concepts for different destinations and products, is at Annex. Land Use Framework		<p>Project 1: Starting date: 2012 Duration: continuous</p>
Lead Responsible	Strategic Partners	
NSTTF BTB – product development Municipal Government	Beltraide Ministry of Tourism Ministry of Natural Resources and the Environment Ministry of Economic Development Ministry of Agriculture & Fisheries Department of Housing	
Destinations for implementation		
Nationwide		
Estimated cost (USD)	Potential financing sources	
USD 3,450,000	NSTTF Ministry of Natural Resources and the Environment Ministry of Tourism Multilateral support	

1.3.3 Sub-program for Pro-poor Tourism and ethnic groups tourism linkage

Description of project Projects		Time frame
<p>Supports effective linkages to poor and ethnic minority individuals to the tourism value chain economic activity through the identification and vulnerable groups that live in the buffer zones of tourism areas and the design of feasible mechanisms to channel tourism income into their livelihood activities.</p> <p>▶ Project 1: Identification & assessment of vulnerable groups. Identify and map existence of poor families and ethnic groups that live and work in the buffer zones of tourism areas.</p> <ul style="list-style-type: none"> Rank vulnerabilities using indicators of human poverty condition and identify high risk at risk groups. Assess the tourism opportunities and linkage gaps that exists within the vulnerable groups/communities. 		<p>Project 1: Starting date: 2014 Duration: Continuous</p> <p>Project 2: Starting date: 2014 Duration: continuous</p>

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1.3.3 Sub-program for Pro-poor Tourism and ethnic groups tourism linkage

► **Project 2: Support PPT and community linkages with the tourism economic sector.** Create a platform through joint ventures with NGOs and/or community associations that will support and enhance poor and ethnic minority individual's link with the tourism value chain economic activity. Many of the support activities will be to direct individuals to other initiatives. Linkage mechanisms to support are:

- **Training skills:** Assist in finding sources of funding and appropriate training opportunities. Find synergies with the education and awareness program.
- **Credit support:** Assist in finding appropriate micro-credit schemes and sources to support these individuals micro/ small/ community tourism private initiatives. Find synergies with the investment and business support program.
- **Negative impact of tourism:** Address negative impact of tourism, especially with regards to access to land for economic activities and/or land displacement due to tourism development. Influence establishment of standards in the Land Use Plan if appropriate.
- **Boost local suppliers participation:** Provide assistance and collaboration to boost opportunities for the poor and ethnic minority in supplying the tourism value chain through formal and informal sales.
- **Empowering actions:** Encourage active participation of poor and ethnic minority groups in decision making regarding the destination development and the tourism industry. Facilitate organization of the poor to participate in and receive tangible and intangible benefits from the tourism activity.
- **Encouraging tourism philanthropy:** Provide tourism information to visitors about pro-poor initiatives, locally produce and fair trade products and information on how to get involve directly or indirectly in local philanthropic activities.
- **Allocation of tourism tax income for community development:** Promote allocation of tourism tax/ fees receipts for local community economic infrastructure development, educational facilities, and social causes among others that fit designated criteria.
- **Encourage Social Responsibility amongst the private sector:** By means of the tourism sector incentives encourage social responsibility incentives among the private sector such as:
 - i. Provide subsidy/ incentives to tourism operators for local procurement and recruitment of poor and ethnic minority individuals
 - ii. Provide subsidy/ incentives to tourism operators that investment in tourism infrastructure that benefit the community
 - iii. Provide subsidy/ incentives to tourism operators that donate to the community development causes.

Lead Responsible	Strategic Partners
Belize Social Investment Fund BTB, Municipal Government Ministry of Economic Development - Poverty Alleviation	Ministry of Tourism, Ministry of Human Development, Ministry of Youth, Ministry of Human Development, NGOs, DFC
Destinations for implementation	
Nationwide	
Estimated cost (USD)	Potential financing sources
USD 2,550,000	WB - Belize Social Investment Fund Multilateral support NGOs

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1.4 National Tourism Sustainability and Quality Assurance Macro Program Schedule

Project/Year	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
1. Program for tourism standards and quality management																			
Sub-program 1. for Tourism Operational standards and licensing																			
Project 1. Revise tour guide licensing categories and minimum standards																			
Project 2. Develop tourism operational guidelines																			
Project 3. Revise licensing procedure and requirements																			
Sub program 2. Tourism Quality Management System and Certifications																			
Project 1. Define an Integrated Quality Management System approach																			
Project 2. Adhesion and certification to the IQM system																			
Project 3. Implement the Tourism Quality Management System of Belize.																			
2. Program for Tourism Training and Capacity Building																			
Sub-program 1. Strengthening Hospitality Tourism Training certifications and degree programs																			
Project 1. Operational hospitality and service quality training																			
Project 2. Tourism management professional degrees																			
Sub-program 2. Subprogram for Tour guide training and accreditation																			
Project 1. Pre-requisite courses for general tour guide license																			
Project 2. Pre-requisite courses for specialty tour guide license.																			
Sub-program 3. Development of the Hospitality & Tourism Polytechnic Institute of Belize																			
Project 1. Development of a Hospitality and Tourism Polytechnic vocational school and hotel training facility.																			
Project 2. Expand Hospitality and Tourism Polytechnic vocational school and hotel training facilities																			
3. Program for Sustainable Tourism Development																			
Sub-program 1. Tourism resources management and conservation																			
Project 1. Identification and mapping of tourism resources																			
Project 2. Management and conservation of tourism resources																			
Project 3. Special sustainable tourism projects initiative																			
Sub-program 2. Tourism Land Use Planning and development support																			
Project 1: Develop a Land Use Master Plan for new and emerging destinations.																			
Sub-program 3. Pro-poor Tourism and ethnic groups tourism linkage																			
Project 1: Identification & mapping of vulnerable groups.																			
Project 2: Support PPT and community linkages with the tourism economic sector																			

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1.5 Budget of the National Tourism Sustainability and Quality Assurance Macro Program

Project/Year	Total (US\$)	2012	2013	2014	2015	2016	2017	2018	2019	2020
1. Program for tourism standards and quality management	6,960,000	25,000	25,000	50,000	100,000	50,000	50,000	150,000	200,000	320,000
Sub-program 1. for Tourism Operational standards and licensing	1,810,000	25,000	25,000	50,000	100,000	50,000	50,000	150,000	200,000	120,000
Project 1. Revise tour guide licensing categories and minimum standards	210,000	25,000	25,000	50,000	50,000					20,000
Project 2. Develop tourism operational guidelines	200,000				50,000	50,000	50,000	50,000		
Project 3. Revise licensing procedure and requirements	1,400,000							100,000	200,000	100,000
Sub program 2. Tourism Quality Management System and Certifications	5,150,000	-	-	-	-	-	-	-	-	200,000
Project 1. Define an Integrated Quality Management System approach	500,000									200,000
Project 2. Adhesion and certification to the IQM system	650,000									
Project 3. Implement the Tourism Quality Management System of Belize.	4,000,000									
2. Program for Tourism Training and Capacity Building	26,350,000	-	35,000	435,000	5,500,000	1,675,000	1,610,000	1,610,000	1,665,000	1,610,000
Sub-program 1. Strengthening Hospitality Tourism Training certifications and degree programs	1,685,000	-	35,000	235,000	300,000	135,000	70,000	70,000	70,000	70,000
Project 1. Operational hospitality and service quality training	860,000		35,000	200,000	100,000	35,000	35,000	35,000	35,000	35,000
Project 2. Tourism management professional degrees	825,000			35,000	200,000	100,000	35,000	35,000	35,000	35,000
Sub-program 2. Subprogram for Tour guide training and accreditation	1,165,000	-	-	200,000	200,000	40,000	40,000	40,000	95,000	40,000
Project 1. Pre-requisite courses for general tour guide license	500,000			100,000	100,000	20,000	20,000	20,000	20,000	20,000
Project 2. Pre-requisite courses for specialty tour guide license.	665,000			100,000	100,000	20,000	20,000	20,000	75,000	20,000
Sub-program 3. Development of the Hospitality & Tourism Polytechnic Institute of Belize	23,500,000	-	-	-	5,000,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Project 1. Development of a Hospitality and Tourism Polytechnic vocational school and hotel training facility.	12,500,000				5,000,000	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Project 2. Expand Hospitality and Tourism Polytechnic vocational school and hotel training facilities	11,000,000									
3. Program for Sustainable Tourism Development	11,700,000	400,000	300,000	450,000	700,000	600,000	600,000	600,000	600,000	750,000
Sub-program 1. Tourism resources management and conservation	5,350,000	200,000	100,000	100,000	350,000	250,000	250,000	250,000	250,000	400,000
Project 1. Identification and mapping of tourism resources	800,000	200,000	100,000	100,000	100,000					100,000
Project 2. Management and conservation of tourism resources	4,000,000				250,000	250,000	250,000	250,000	250,000	250,000
Project 3. Special sustainable tourism projects initiative	550,000									50,000
Sub-program 2. Tourism Land Use Planning and development support	3,800,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000
Project 1: Develop a Land Use Master Plan for new and emerging destinations.	3,800,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000
Sub-program 3. Pro-poor Tourism and ethnic groups tourism linkage	2,550,000	-	-	150,000	150,000	150,000	150,000	150,000	150,000	150,000
Project 1: Identification & mapping of vulnerable groups.	1,700,000			100,000	100,000	100,000	100,000	100,000	100,000	100,000
Project 2: Support PPT and community linkages with the tourism economic sector	850,000			50,000	50,000	50,000	50,000	50,000	50,000	50,000
TOTAL BUDGET QUALITY MACRO PROGRAM	45,010,000	425,000	360,000	935,000	6,300,000	2,325,000	2,260,000	2,360,000	2,465,000	2,680,000

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Project/Year	Total (US\$)	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
1. Program for tourism standards and quality management	6,960,000	300,000	300,000	400,000	300,000	420,000	550,000	750,000	850,000	950,000	1,170,000
Sub-program 1. for Tourism Operational standards and licensing	1,810,000	100,000	100,000	100,000	100,000	120,000	100,000	100,000	100,000	100,000	120,000
Project 1. Revise tour guide licensing categories and minimum standards	210,000					20,000					20,000
Project 2. Develop tourism operational guidelines	200,000										
Project 3. Revise licensing procedure and requirements	1,400,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
Sub program 2. Tourism Quality Management System and Certifications	5,150,000	200,000	200,000	300,000	200,000	300,000	450,000	650,000	750,000	850,000	1,050,000
Project 1. Define an Integrated Quality Management System approach	500,000	200,000	100,000								
Project 2. Adhesion and certification to the IQM system	650,000		100,000	100,000	100,000	100,000	50,000	50,000	50,000	50,000	50,000
Project 3. Implement the Tourism Quality Management System of Belize.	4,000,000			200,000	100,000	200,000	400,000	600,000	700,000	800,000	1,000,000
2. Program for Tourism Training and Capacity Building	26,350,000	110,000	2,610,000	860,000	915,000	860,000	860,000	3,360,000	860,000	915,000	860,000
Sub-program 1. Strengthening Hospitality Tourism Training certifications and degree programs	1,685,000	70,000	70,000	70,000	70,000	70,000	70,000	70,000	70,000	70,000	70,000
Project 1. Operational hospitality and service quality training	860,000	35,000	35,000	35,000	35,000	35,000	35,000	35,000	35,000	35,000	35,000
Project 2. Tourism management professional degrees	825,000	35,000	35,000	35,000	35,000	35,000	35,000	35,000	35,000	35,000	35,000
Sub-program 2. Subprogram for Tour guide training and accreditation	1,165,000	40,000	40,000	40,000	95,000	40,000	40,000	40,000	40,000	95,000	40,000
Project 1. Pre-requisite courses for general tour guide license	500,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000
Project 2. Pre-requisite courses for specialty tour guide license.	665,000	20,000	20,000	20,000	75,000	20,000	20,000	20,000	20,000	75,000	20,000
Sub-program 3. Development of the Hospitality & Tourism Polytechnic Institute of Belize	23,500,000	-	2,500,000	750,000	750,000	750,000	750,000	3,250,000	750,000	750,000	750,000
Project 1. Development of a Hospitality and Tourism Polytechnic vocational school and hotel training facility.	12,500,000										
Project 2. Expand Hospitality and Tourism Polytechnic vocational school and hotel training facilities	11,000,000		2,500,000	750,000	750,000	750,000	750,000	3,250,000	750,000	750,000	750,000
3. Program for Sustainable Tourism Development	11,700,000	650,000	650,000	650,000	650,000	750,000	650,000	650,000	650,000	650,000	750,000
Sub-program 1. Tourism resources management and conservation	5,350,000	300,000	300,000	300,000	300,000	400,000	300,000	300,000	300,000	300,000	400,000
Project 1. Identification and mapping of tourism resources	800,000					100,000					100,000
Project 2. Management and conservation of tourism resources	4,000,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000
Project 3. Special sustainable tourism projects initiative	550,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000
Sub-program 2. Tourism Land Use Planning and development support	3,800,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000
Project 1: Develop a Land Use Master Plan for new and emerging destinations.	3,800,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000
Sub-program 3. Pro-poor Tourism and ethnic groups tourism linkage	2,550,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000
Project 1: Identification & mapping of vulnerable groups.	1,700,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
Project 2: Support PPT and community linkages with the tourism economic sector	850,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000
TOTAL BUDGET QUALITY MACRO PROGRAM	45,010,000	1,060,000	3,560,000	1,910,000	1,865,000	2,030,000	2,060,000	4,760,000	2,360,000	2,515,000	2,780,000

Vocational Tourism School Benchmarks

Vocational Tourism School Benchmarks

					
Service structure	▶ Heart National Training agency, Jamaica	▶ Ecole Paul Dubrue, Cambodia	▶ Sekolah Tinggi Pariwisata Bali Tourism Institute, Bali	▶ Barbados community college, Barbados	▶ Tobago Hospitality & Tourism Institute, Tobago
Management/ Operation	▶ Training public organization ▶ Financed by 3% business tax	▶ NGO ▶ Funded by private and foundation donation, income from the training restaurants and hotel	▶ Tourism institute managed by the ministry of Tourism and culture of Republic Indonesia ▶ It is funded by the government	▶ The tourism institute is a joint venture between European Union and The Barbados government ▶ The college is managed by a board of management	▶ The school is a private company ▶ Its funded by the tuition fees and supports from diverse organizations
Programs	▶ Tourism and hospitality programs offered in 2 training center in the country ▶ Short courses and one year training available in Hospitality services, food preparation and reception	▶ Programs of one year in hospitality and tourism ▶ Programs of one year in F&B ▶ Programs of one year in cooking and pastry ▶ Short courses available for professional (Continuous education)	▶ Programs in tourism and hospitality ▶ Programs in Spa, food and beverage ▶ Programs in Events managements and MICE	▶ It proposes full-time bachelor of science in tourism and hospitality management, culinary arts, tourism and travel, hospitality ▶ Part-time programs in F&B, Reception, airport operation, Caribbean tourism	▶ The school proposes 2 year trainings in culinary arts, Hospitality management, F&B and Tourism studies
Partnership	▶ Cooperation with employment associations such as World international skills, Jamaica Employers Federation	▶ Partnership with worldwide tourism institutes to upgrade their programs ▶ Partnership with professional of the hospitality sector ▶ Partnership with diverse private foundations	▶ Partnership with several Indonesian professional associations ▶ School supported by the UNWTO, ILO, United Nation ESCAP, UNDP	▶ Collaboration with development associations ▶ Collaboration with tourism organization ▶ Partnership with Tourism institutes	▶ Partnership with tourism businesses of Tobago ▶ Registered with the Accreditation Council of Trinidad and Tobago
Training Hotel	▶ The agency owns a training hotel of 56 accommodations, restaurants, bars, conference facilities and sports facilities	▶ The school has a training hotel of 4 guests rooms as well as 2 training restaurants (A cafe and a gastronomic restaurant	▶ The training hotel has 17 accommodations, a restaurant and a spa facility	▶ The institute is located in the training hotel ▶ The hotel offers 21 accommodations and entertainment facilities	▶ The school has a training restaurant and an event service
Fees	▶ No tuition fees for program of the first level ▶ Second level from \$3,000 USD to \$3,450 USD	▶ Possibility for the student to be sponsored by a company ▶ \$600 USD per year	▶ RP 6.000.000 (around USD 700 per semester) all inclusive (books, uniform....)	▶ Tuition fees for the local students: from \$320 USD to \$630 USD ▶ Caribbean Student from \$4,805 USD to \$14,085 USD ▶ Extra-regional student from \$8,805 USD to \$26,085 USD	▶ Local student \$204 USD in Average ▶ International Student: \$1,175 USD in average

Heart Trust NTA, Jamaica



Information on Heart Trust NTA	
History & Location	<p>The Heart Trust National Trust Agency is a public institution which proposes programs in several sector such as tourism, commercial, industries among others</p> <p>The Culloden vocational centre and the Runaway Bay Hotel Training Institute are the 2 main facilities for tourism and hospitality programs</p> <p>The Culloden centre is located on the south cost of Jamaica in a growing touristic area and the Runaway Bay hotel is located in a seaside town on the north cost of Jamaica</p>
Management and operation of the school	<ul style="list-style-type: none"> ▶ The Heart Trust NTA is a public institution offered by the government of Jamaica ▶ It is financed by the 3% taxes on the companies exceeding USD14.444 per month of payroll ▶ The agency has several facilities around the country specialized in different sector or degree type
Programs	<ul style="list-style-type: none"> ▶ The HEART Trust/NTA is the leading trainer and provider of human resources in the hospitality sector, either through on-the-job training or through the academies, vocational training centers and special programs in Jamaica ▶ The academy proposes full-time and part-time programs ▶ Programs are created to prepare working age Jamaican to work in the Jamaican hospitality industry: <ul style="list-style-type: none"> ▪ Hospitality services ▪ Food preparation ▪ Front office agent
Partnership and association	<ul style="list-style-type: none"> ▶ Partnerships with: <ul style="list-style-type: none"> ▪ World international skills ▪ International Labor Association ▪ Jamaica Employers Federation ▪ ICT4D Jamaica (association of promoting the use of the information and communication technology) ▪ Ministry of Education, Jamaica ▪ Human Resource Management Association of Jamaica
Training hotel and restaurant of the school	<ul style="list-style-type: none"> ▶ The agency owns a training hotel called Runaway Bay Hotel since 1986 ▶ This facilities offers programs of operational services on site ▶ The hotel proposes 56 rooms, a restaurant, a bar, a piano bar, a golf, a swimming pool, a gymnasium, a gift shop and conference facilities ▶ Room rates from USD 88 to USD 195
Prices of the programs	<ul style="list-style-type: none"> ▶ No tuition fees for the Heart programs – level 1 ▶ Tuition fees for the programs level2: from USD 3.000 to USD 3.450

Sources: <http://www.heart-nta.org/>; <http://www.runawayheart.com.jm>

Ecole Paul Dubrule, Cambodia



Information on Ecole Paul Dubrule	
History & Location	Inaugurated in 2002 by the co-founder of Accor, Paul Dubrule, the school aims to provide a professional and international training in hospitality and tourism. The school is located at 6 km of Siem Reap, the capital of the Siem Reap Province and the main touristic destination of Cambodia.
Management and operation of the school	<ul style="list-style-type: none"> ▶ This school is a non governmental organization (NGO) ▶ The school funds its activities thanks to private donation, tuition fees and the incomes of the training hotel and restaurants as well as the Khmer cooking courses ▶ The foundation Accor provide the school with some financial help ▶ The school is training 200 students per year (50 cooking students, 20 students in tourism, 50 students in hospitality, 40 students in F&B and 40 student in Bakery)
Programs	<ul style="list-style-type: none"> ▶ Programs are available for tourism, hospitality and F&B services ▶ The duration of the program is one or two years according to the certificate wished by the student ▶ The student has the chance to receive an academic and practical training ▶ The school proposes also short courses for professionals who desire to enhance one of their abilities such as English, French, management skills, basic techniques of reception
Certification and association	<ul style="list-style-type: none"> ▶ The institute created a large number of partnerships with professionals of hospitality and tourism, other schools of tourism and hospitality and foundations such as Accor, the foundation Paul Bocuse (France), le Lycée d'hôtellerie et de tourisme de Saint Quentin en Yvelines (France), The foundation Mérieux (France), the school Lenotre (France) and much more ▶ Partners provide internships for student and help the management of the school to update the programs to fulfill the needs of the local and international tourism businesses
Training hotel and restaurant of the school	<ul style="list-style-type: none"> ▶ The school provides one training hotel and two restaurants ▶ The hotel offers 4 guests rooms from USD 20 to USD 35 the night ▶ The café and the jardins des délices are the two training restaurants where the students can practice their specialization
Prices of the programs	<ul style="list-style-type: none"> ▶ Possibility for the student to be sponsored by a company ▶ USD 600 per year per student

Sources: Ecole Pierre Dubrule Website, <http://www.ecolepauldubrule.org>



Sekolah Tinggi Pariwisata Bali Tourism Institute, Bali

Information on Bali Tourism Institute	
History & Location	<p>The Bali Tourism Institute has been created in 1972 by the assistance of the United Nations Development Programme (UNDP) and was upgraded as university 1993. It is located in a seaside touristic area, Nusa Dua.</p> <p>The institute is a training facility for hospitality and tourism professionals as well as a research facility for tourism development and sustainable tourism.</p>
Management and operation of the school	<ul style="list-style-type: none"> ▶ This tourism institute is managed and financed by the ministry of Tourism and Culture of The Republic Indonesia. ▶ The UNWTO, The ILO, The United nation ESCAP, UNDP support the institute ▶ Each year the school graduates 300 students
Programs	<ul style="list-style-type: none"> ▶ The institute proposes a bachelor in tourism management as well as several other degrees in <ul style="list-style-type: none"> ▪ Tourism management ▪ Hospitality business ▪ F&B ▪ Spa ▪ Tour operator ▪ MICE and events management ▶ They have 3 departments (tourism, hospitality and travel)
Certification and association	<ul style="list-style-type: none"> ▶ The institute is member of the <ul style="list-style-type: none"> ▪ International Hotel and Restaurant Association (IHRA) ▪ Pacific Asia Travel Association (PATA) ▪ Persikaran Hotel and restaurant Indonesia (PHRI Indonesia) ▪ Indonesian Hotelier Association (IAPINDO I.H.A) ▶ And has developed partnership with Bali Hotel Associations (BHA), Bali Tourism Board, Indonesia Tour Guide Association, Tourism Training Department Association (TTDA), Indonesia Hotel House Keeper, Bali Spa and Wellness Association (BSWA), Bali Culinary Professional (BCP), International Culinary Association (ICA)
Training hotel and restaurant of the school	<ul style="list-style-type: none"> ▶ The training hotel is the Langon Bali Spa resort located next to the institute. ▶ It offers to guests 10 rooms, 4 junior suites, 3 seniorsuites, a restaurant, a swimming pool and a spa ▶ The average rates of the rooms and suites: from USD 60 to USD150
Prices of the programs	<ul style="list-style-type: none"> ▶ RP 6.000.000 (around USD 700 per semester) all inclusive (books, uniform....)

Sources: Bali Tourism institute, <http://www.stpbali.ac.id>

Barbados Community College, Barbados



Information on Barbados community College	
History & Location	<p>The community college was created in 1968 by the parliament of Jamaica in order to provide a post secondary-school. It offers education degrees in several sectors such as commerce, tourism, fine art, natural sciences</p> <p>The tourism institute is located in the Pommarine hotel in Hastings on the coast near the capital of Barbados, Bridgetown.</p> <p>The mission of the institution is "to promote excellence in hospitality and tourism through quality education, training and service".</p>
Management and operation of the school	<ul style="list-style-type: none"> ▶ The College is administered by a Board of Management consisting of nine members, under a Chairman, appointed by the Minister of Education. The Board meets on the first Wednesday of every month to manage, conduct and supervise the activities of the College and the facilities, enquire into and adjudicate upon disciplinary charges against students or members of the college staff ▶ The College Planning and Advisory Committee is in charge of all aspects of College life and makes recommendations designed to improve the overall operations of the College. ▶ Advisory committees are in charge of the development of the programs and are composed of the staff of each program section ▶ The tourism institute is a joint venture between the European Union and the Government of Barbados ▶ Funded through the fees of the program, the revenue of the hotel and the government of Barbados
Programs	<ul style="list-style-type: none"> ▶ The tourism institute proposes full-time bachelor of science programs in tourism and hospitality management, culinary arts, hospitality studies, tourism and travel, catering and part-time programs in F&B, reception, airport operation, Caribbean tourism (hospitality services according to the different cultures of the region)
Certification and association	<ul style="list-style-type: none"> ▶ The tourism institute is working in collaboration with diverse associations and other tourism institutes: <ul style="list-style-type: none"> ▪ Caribbean tourism industry standard projects ▪ Organization of American States ▪ Caribbean program for economic competitiveness ▪ Caribbean tourism organization ▪ Canadian international development agency ▪ U.S agency for international development ▪ European Union ▪ Tobago hospitality institute ▪ Trinidad hospitality institute
Training hotel and restaurant of the school	<ul style="list-style-type: none"> ▶ The Pommarine training hotel was created in 1997 ▶ The hotel is a fully integrated training structure with classrooms, kitchens, laboratories, resource center (library and computer room) ▶ The hotel proposes 20 rooms and 1 apartment; 2 two restaurants; a golf, a swimming pool and tennis courts ▶ The average rates of the hotel rooms are from USD 106 to USD 185 the night
Prices of the programs	<ul style="list-style-type: none"> ▶ Fees applied to the programs depend on the origin of the student ▶ Local student fees: USD 320 the first year, USD 485 the second year, USD 630 the third year ▶ Regional Student (Caribbean): USD 4.805 the first year, USD 9.455 the second year and USD 14.085 the third year ▶ Extra-regional Student (International): USD 8.805 the first year, USD 17.455 the second year and USD 26.085 the third year

Sources: <http://www.bcc.edu.bb/>; <http://www.pommarine.com>



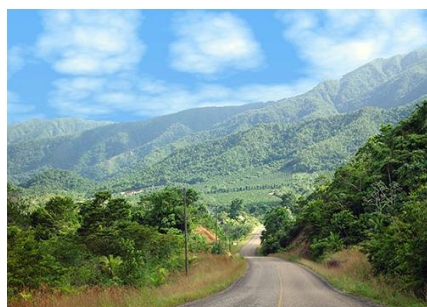
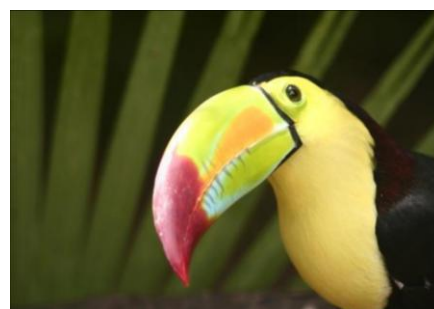
Tobago Hospitality & Tourism Institute, Tobago

Information on THTI	
History & Location	THTI was created in 1996 by the National Government and the Trinidad and Tobago Hotel and Tourism Association (TTHTA) Its is located on the south of Trinidad and Tobago near the international Airport
Management and operation of the school	<ul style="list-style-type: none"> ▶ The institute was developed in 1996 thanks to a 2 millions Dollars grant from the Inter-American Development Bank ▶ The programs were created in collaboration with the tourism, education and governmental stakeholders ▶ From 2003, the facility was funded by the Tobago House of Assembly and in 2005 they also assumed the management role of the school. ▶ In 2006, the school changed its name to THTI and became a private institution ▶ It is now funded by the tuition fees and support from international organizations and the government ▶ They train 200 to 300 students each year
Programs	<ul style="list-style-type: none"> ▶ The school proposes programs of 2 years training in: <ul style="list-style-type: none"> ▪ Culinary arts ▪ Hospitality management ▪ Food and beverage operation ▪ Tourism studies ▶ The school offers also short courses to enhance skills in particular domains such as languages, food preparation, tour guiding, accounting, event management, F&B services
Certification and association	<ul style="list-style-type: none"> ▶ Partnership with tourism and hospitality businesses of Tobago ▶ They are registered with the Accreditation Council of Trinidad and Tobago (The association of quality assurance of education programs in Trinidad and Tobago)
Training hotel and restaurant of the school	<ul style="list-style-type: none"> ▶ The school offers a training restaurant with professional kitchen and an auditorium where functions can be organized ▶ The restaurant is open every day for lunch and diner ▶ The restaurant offers also a catering service for events
Prices of the programs	<ul style="list-style-type: none"> ▶ Local student: USD140 persemester, laboratory: USD11, annual fee : USD 30, insurance fee: USD 23 ▶ International Student: USD 875 persemester, laboratory: USD 210, annual fee: USD 50, insurance fee: USD 40

Sources: <http://www.bcc.edu.bb/>; <http://www.pommarine.com>

NATIONAL SUSTAINABLE TOURISM MASTERPLAN FOR BELIZE 2030

National Tourism Infrastructure Macro Program



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1 National Tourism Infrastructure Macro Program

In order to enhance positive sustainable impacts from tourism the destination must entirely be equipped with basic infrastructure, transportation infrastructure, tourism supply and facilities and skilled human resources.

There are two programs described:

1. Basic infrastructure and support services development
2. Development of national connectivity

According to the conclusions of the diagnostics, which pointed out the infrastructure elements constraining Belize's tourism development, Belize as a destination requires improvements in at least the following general issues:

- ▶ **Basic infrastructure and support services**, such as upgrading, expanding and enhanced management of water treatment, waste management, telecommunications and banking services.
- ▶ **Development of national connectivity**, responds to the need of transportation infrastructure improvements such as enhancing highways and road conditions, regional and international airport safety and capacity, sea port and pier facilities development.

The proposed general actions aim to cover those infrastructure gaps and hence to contribute to global tourism development of the country at national and regional/local basis. Specific infrastructure and facilities development actions contributing particularly to product enhancement will be covered in the "Product Development Macro-Program" – section of the NSTMP.

1.1 Program for Basic infrastructures and Support Services Development

Gaps identified - Diagnostic

The diagnostic phase identified that Belize is struggling with insufficient and ineffective solid and liquid waste management (sewage, drainage systems) and non-renewable resource management (water and energy supplies) as these are crucial for an enhanced positive tourism experience.

- ▶ Insufficient solid and liquid waste disposal, result in:
 - Mosquito infestation
 - Malaria and dengue infection risk
 - Visual and/or environmental pollution
- ▶ Insufficient drainage and sewage systems, result in:
 - Flooding
 - Water contamination
 - Diseases due to water contamination
 - Negative image of the country's development
- ▶ Insufficient water and electric power plants and usage of few renewable technologies, result in:
 - Water and electricity shortages
 - Cost intensive
 - Untenable and inefficient usage of natural resources

Belize needs to improve its basic infrastructures to support the sustainable development of tourism growth. These well-functioning infrastructures are regarded as basic infrastructure that tourism requires before tourism operation even begins. Furthermore, Belize must improve its telecommunications, which would enable tourism companies to compete with other destinations at international level. In the meantime, it is relevant to address access to banking in some destinations as a key gap to be solved for tourism, since it can affect visitors' expenditures at destinations.

Vision 2030

By 2030, Belize will be a destination that provides its resident population, the tourism industry and tourists with basic services that cater for their needs and requirements. Belize will promote the use green technology and renewable resources to effectively and sustainably solution energy and water consumption.

Description of the program

The "Program for Basic Infrastructures and Support Services Development" suggests four different sub-programs to reach the Vision 2030:

- ▶ The **Sub-program for waste management for tourism destinations** strengthens the management and upgrading of existing systems at tourism destinations and tourism sites and assets throughout the country.

National Sustainable Tourism Master Plan of Belize 2030• National Tourism Infrastructure Macro-Program

- ▶ The **Sub-program for non-renewable resources management in tourism destinations** will identify the needs and constraints of limited consumption of resources (water and energy) in tourism destinations and sites, as well as plan for the growth expected from integral development of tourism destinations projects. It devises appropriate solutions and investment schemes.
- ▶ The **Sub-program for raising awareness and incentives** stipulates the creation of awareness campaigns and incentive programs in order to enlist public support in reducing the pressure in the current and future systems.
- ▶ The **Sub-program for telecommunication and banking services** assesses the actual state of banking and telecommunication networks in Belize and proposes different steps to address the situation.

Lead stakeholders

MTCAC should be the lead responsible institution for strengthening the implementation of these programs, while the Ministry of Works and its departments will be the true executing task forces who will analyze the potential demand and system/infrastructural requirements for 2030, taking into account larger numbers of tourists and higher population at tourism destinations. The NSTTF will assist the Ministry of Works and its departments in charge to identify potential funding resources and further areas of development.

Objectives

- ▶ To stimulate the demand for travel to Belize by developing attractive integral tourism destinations including the required basic infrastructure developments based on the potential demand and the expected numbers of arrivals
- ▶ To improve environmental standards by providing efficient liquid and solid waste management systems that do not cause any visual and environmental pollution.
- ▶ To raise awareness and improve public attitudes to recycling and littering by implementing public awareness campaigns that will inform at least 300,000 residents.
- ▶ To reduce health hazards by provide a strong drainage system and maintenance management to reduce the annual amount of flooding days to a maximum of 8 days by tourism area.
- ▶ To reduce consumption of scarce resources by promoting green technologies and the usage of renewable energies to Belize's tourism sector by providing incentives of a value of at least USD 9,000,000
- ▶ To enhance the tourism destination's competitiveness by stimulating tourism businesses to accept international credit cards as payment mode.
- ▶ To enhance the tourism destination's competitiveness by increasing the communication coverage in the country's territory.

Milestones

Review Years	Milestones
2015	▶ Waste management model for integral development of tourism destinations and sites developed

National Sustainable Tourism Master Plan of Belize 2030• National Tourism Infrastructure Macro-Program

	<ul style="list-style-type: none"> ▶ Non-renewable energy management model for integral development of tourism destinations and sites developed ▶ Waste and limited resource management awareness raising and incentives program developed
2020	<ul style="list-style-type: none"> ▶ Telecommunications and banking expansion model for integral development of tourism sites developed
2025	<ul style="list-style-type: none"> ▶ Continuous implementation and improvement of Belize's infrastructures
2030	<ul style="list-style-type: none"> ▶ Continuous implementation and improvement of Belize's infrastructures

Description of the sub-programs

1.1.1 Sub-program for Waste management for tourism destinations

Description and Projects	Time frame
<p>Solid waste handling, sewage systems and drainage system are basic waste management areas which have an impact on tourism experience and the local community quality of life. The management and upgrading of these systems are a priority in the case of an integral development of tourism destinations and sites in the country. The product development approach should create a model to address waste management constraints.</p> <ul style="list-style-type: none"> ▶ Project 1: Solid waste model and management for tourism. Currently Belize's dump sites are currently miss-located (along main tourism trails/roads) and resulting in a visual pollution for tourists. In addition, improper solid waste collection, maintenance, sheltering and treatment. This project will project will address it by creating the most adequate solid waste planning and management model for Belize and its destinations, requiring different focuses. The new solid waste model will create a more accurate dump site network with dump sites out of tourism trails, flooded areas and populated areas • Identify the solid waste managing constraints occurring main tourism destinations, along themed routes or around main tourism corridors. • Further assessment calculates and plans the building of the required sewage system collection and treatment capacities in order to handle the requirements of the estimations on the future increase in citizens and tourists. • The new solid waste management plan identifies the most adequate collection, transportation, processing, recycling or disposal model, and monitors the waste materials. The model identifies the right waste containers and receptors by distinctive areas (urban areas vs. rural areas vs. areas that are badly communicated). The management plan could include modern green technologies such as Mechanical Biological Treatments (MBT-green technologies) and Clean Development Mechanism initiatives (CDM – to reduce the national carbon emission) and research on supplementary revenue possibilities from the generation and sale of bio-energy to assure the principle of the 3Rs (Reduce, Reuse, Recycle). • Find funding sources and partnership schemes for investment and implementation of priority projects 	<p>Project 1: Starting date: 2014 Duration: continuous</p> <p>Project 2: Starting date: 2014 Duration: continuous</p> <p>Project 3: Starting date: 2014 Duration: continuous</p>

1.1.1 Sub-program for Waste management for tourism destinations

- Develop mechanism of monitoring, evaluation and continuous improvement of implemented systems. Proactive enhancements of the systems taking in consideration tourism growth projection.
- ▶ **Project 2: Sewage management for tourism destinations.** The development of the tourism destinations requires a standardized and centralized sewage collection and treatment system as in some instances grey water is discharged into public drains or open water before being treated. This improper management results in polluted waters being unhealthy for Belize's prime tourism assets (the underwater world and the reef), resulting in a negative tourist's experience and last but not least, endangering the health of citizens and tourists.
 - Identify the most adequate sewage system for each tourism destination, urban and rural tourism areas and integrate it into the national sewage system plan.
 - Furthermore, the assessment calculates and plans the building of the required sewage system collection and treatment capacities in order to handle the requirements of the estimations on the future increase in citizens and tourists.
 - This project will identify the most apposite sewage treatment (including the tertiary treatment adequate for fragile ecosystems) system for each sewage collection system in the tourism destinations and provide small community wastewater treatment solutions. In addition, the sewage treatment system will identify potential recycle initiatives. The project furthermore identifies self-funding concepts and funding resources for the implementation of the national sewage treatment plan.
 - Find funding sources and partnership schemes for investment and implementation of priority projects
 - Develop mechanism of monitoring, evaluation and continuous improvement of implemented systems. Proactive enhancements of the systems taking in consideration tourism growth projections
- ▶ **Project 3. Drainage model and management for tourism.** This project will develop a national portfolio of adequate drainage systems throughout tourism destinations and themed routes/tourism trails. These drainage systems will meet the requirements of controlling floods and address the environmental effects of increase in runoff volume and velocity caused by developments as well as flow peaks.
 - Identifies the constraints occurring based on the current drainage systems and on the area requiring different, additional, or new drainage systems. Existing constraints that need to be eliminated are especially flooded areas resulting in poor and endangered living conditions, inaccessible tourism destinations and high incidents of mosquito infestation causing malaria and dengue cases.
 - This project should include the development and design of a drainage management plan utilizing sustainable international best management practices.
 - Find funding sources and partnership schemes for investment and implementation of priority projects
 - Develop mechanism of monitoring, evaluation and continuous improvement of implemented systems. Proactive enhancements of the systems taking in

National Sustainable Tourism Master Plan of Belize 2030• National Tourism Infrastructure Macro-Program

1.1.1 Sub-program for Waste management for tourism destinations

consideration tourism growth projections	
Lead responsible	Strategic partners
Ministry of Works Ministry of Public Utilities Ministry of Environment	NSTTF, BTB – Product development managers, BTIA and private sector, NGOs, Municipal governments, Ministry of Health, Ministry of Natural Resources and the Environment
Destinations for implementation	
Belize National Territory:	
Estimated cost (USD)	Potential financing sources
USD 6,300,000	NSTTF, Municipal Government, Public-private partnerships, Auto funding of the project (waste management), Garbage collection tax, Multilateral and International donors

1.1.2 Sub-program for non-renewable resources management in tourism destinations

Description and Projects	Time frame
<p>This subprogram will identify the needs and constraints of limited resources (water and energy) consumption in tourism destinations and sites, as well as plan for the growth expected from integral development of tourism destinations projects. It devices appropriate solutions and investment schemes.</p> <p>► Project 1: Fresh water supply and management. This project will identify the necessities of the current water treatment plants and their capacities of treating ground water or surface water to become potable water for public consumption. Furthermore, the project will identify a climate independent, secure and sustainable fresh water supply able to meet population, tourism and business needs well into the future.</p> <ul style="list-style-type: none"> Assess constrains to secure fresh water supply and treatment facilities for the required amount consumption in the urban and rural tourism destinations and sites. Devises the most adequate fresh water treatment techniques to cater the expected requirements for each tourism destination. Depending on the destination's needs, the location could integrate green technologies for fresh water consumption. This long-term project will ensure sufficient fresh water supply for the population and tourism sector to prevent water shortages. Find funding sources and partnership schemes for investment and implementation of priority projects Develop mechanism of monitoring, evaluation and continuous improvement of implemented systems. Proactive enhancements of the systems taking in consideration tourism growth projections <p>► Project 2: Energy supply plan and management for tourism. This project will identify the necessities of the current energy supply and the demand of public consumption in tourism destinations and sites. Furthermore, the project will identify a variety of green energy technologies and renewable energy sources meeting sustainably the future needs of the population, the tourism sector and business.</p>	<p>Project 1: Starting date: 2014 Duration: continuous</p> <p>Project 2: Starting date: 2014 Duration: continuous</p>

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1.1.2 Sub-program for non-renewable resources management in tourism destinations

- Assess constraints to secure energy sources to supply for the required amount consumption in the urban and rural tourism destinations and sites.
- Assess improvement recommendations to secure sufficient energy sources to supply the future demand of the future rural and urban tourism destination. In addition this project should identify and design appropriate and resilient renewable energy systems which will be scheduled to be built according to the prognosis of the population's and tourism sector's requirements
- Find funding sources and partnership schemes for investment and implementation of priority projects
- Develop mechanism of monitoring, evaluation and continuous improvement of implemented systems. Proactive enhancements of the systems taking in consideration tourism growth projections

Lead responsible	Strategic partners
Ministry of work Ministry of Public Utilities	NSTTF, Belize Water Services, Belize Electricity Limited BTB – Product development managers BTIA and private sector NGOs Municipal governments Ministry of Natural Resources and the Environment
Destinations for implementation	
Belize National Territory	
Estimated cost (USD)	Potential financing sources
USD 4,200,000	NSTTF, Municipal Government, Public-private partnerships, Multilateral and International donors

1.1.3 Sub-program for raising awareness and incentives

Description and Projects	Time frame
<p>As a collateral to investing in waste and limited resources systems this subprogram stipulates the creation awareness campaigns and incentive programs in order to enlist public support in reducing the pressure in the current and future systems. The projects defined below create the umbrella support structure for the implementation of the sub-program.</p> <p>► Project 1: Awareness and training. This project will assist the main actors and implementing parties to respond to climate change and include modules of technology transfer, national communications and funding. Effective management of solid waste and limited resources requires the cooperation of the general public. It is, therefore, important to ensure that public and decision makers' awareness activities are incorporated into the external support package. Once the interests of the public and decision makers in improving solid waste management are created, the sustainability of tourism growth will be significantly improved. The project will focus on:</p> <ul style="list-style-type: none"> • Raising the public's awareness not to litter on the streets, along the roads, in 	<p>Project 1: Starting date: 2015 Duration: continuous</p> <p>Project 2: Starting date: 2015 Duration: continuous</p>

1.1.3 Sub-program for raising awareness and incentives

the sea/river/lagoons, or in other inappropriate areas of the country's territory by putting into action an anti-litter campaign.

- Designing various volunteering projects among the public, civil and private tourism sector. Some of these projects can also be directed to eco-sensitive tourists wishing to make a difference and enjoying assisting the sustainable and ecologic development of a visited country (reference to "Volunteerism")
- Implementing volunteering projects between the public, civil and private tourism sectors
- Creating advertisement campaign to raise the public awareness on waste creation and dumping, recycling programs, and energy and water
- Implementing an educational campaign explaining the value of recycling system and green behaviors

► **Project 2: Incentive program for the sustainable private sector.** The government should support the development of this program by offering benefits to the private companies that cooperate, with reducing the pressure in basic services consumption, such as:

- Installing equipment and facilities to reduce their energy and resource consumption (shower flow reducer, single flush devices, micro sprinkler watering system, lighting efficiency control systems, low energy light bulbs, etc.)
- Conducting an effective waste management and monitoring, and controlling the quality and quantity of the generated waste, the gas emission and the solvent discharge, implementing a recycling system in the company
- Committing to the environment, protecting local plant species, reducing erosion and protecting natural habitats of native animals
- Certification agencies that include Global Sustainable Tourism Criteria in order to enhance an effective sustainability planning; maximize social and economic benefits for the local community; enhance cultural heritage; and reduce negative impacts to the environment.
- Benefiting models for incentives will have to be defined in advance, for instance:

Fiscal benefits (tax discount on green investment, tax discount on energy consumption)

Marketing advantages (advertising in the BTB brochures or visibility on its websites)

Counseling private company to increase the implementation of green technologies

Lead responsible	Strategic partners
Ministry of work	BTB- product development, Private sector, NGOs, Municipal governments, Ministry of Natural Resources and the Environment, NSTTF; Beltraide.
Destinations for implementation	
Belize National Territory.	
Estimated cost (USD)	Potential financing sources
USD 4,000,000	NSTTF, NGOs, Municipalities, Public-private partnerships, Multilateral donors

1.1.4 Sub-program for Telecommunication and banking services

Description and Projects		Time frame
<p>With the increase of tourist arrivals, the access to communication systems such as WIFI and services such as banking must increase to meet the needs of the international tourism market. This Sub-program assesses the actual state of banking and telecommunication networks in Belize and proposes different steps to address the situation.</p> <p>▶ Project 1: Telecommunication supply and banking services for tourism</p> <ul style="list-style-type: none">• Assessment of telecommunication and banking needs in tourism destinations.<ul style="list-style-type: none">i. Assess the current status of the telecommunication systems, especially wireless networks such as internet, wireless connectivity and satellite and the recommended improvement necessities per tourism destination.ii. Assessment of available ATM, exchange offices and bank offices in tourism areas and sites• Development of a wireless communications network for the tourism destinations. This task will develop the recommendations provided in the previous assessment and analysis and develop an implementation plan and calendar per tourism destination.• Find funding sources and partnership schemes for investment and implementation of priority projects• Develop mechanism of monitoring, evaluation and continuous improvement of implemented systems. Proactive enhancements of the systems taking in consideration tourism growth projections		<p>Starting date: 2019 Duration: continuous</p>
Lead responsible	Strategic partners	
Ministry of Public Utilities, Information and Broadcasting, Ministry of Finance	BTB – product development Private, public and international banks	
Destinations for implementation		
Nationwide		
Estimated cost (USD)	Potential financing sources	
USD 750,000	NSTTF, Municipal Government, Public-private partnerships	

1.2 Program for the Development of the National Connectivity

Gap identified – Diagnostic

- ▶ **Air connectivity:** The international airport infrastructure in terms of safety standards and handling capacity for flight companies and passengers.
 - There is an alarming lack of direct connections to Europe and Central America, but also to South America.
 - Belize International Airport, and particularly the passenger terminal facilities, are old and small, not fulfilling the required international standards to receive tourists. Not enough services are being offered within the passenger terminal, and those provided lack the quality required.
 - A new international airport developed by private stakeholders is under construction in Stann Creek.
- ▶ **Land connectivity:** The land connectivity should enable better access to the destinations, by improving conditions of the national highways, main and secondary roads and bridges and therefore to increase safety and ease of travel on the country's road network.
 - Some of these challenges are mainly focused on the following issues: inappropriately surfaced roads leading to flood risk; carrying capacity for all types of transportation; insufficient and inappropriate signage along the routes; and lack of physical planning in particular in rural communities in and around tourism sites and destinations.
 - Road conditions in Belize require further improvement and maintenance in specific stretches. As a general point of view, road maintenance is recommended for all roads with the aim of improving or maintaining conditions and security.
- ▶ **Sea connectivity:** The national sea connectivity network requires extension in order to diversify the accessibility to tourism destinations. In addition, the sea connectivity network requires special emphasis on physical planning and safety improvements due to the large amount of piers, which are sensitive to storms and hurricanes and contribute to visual pollution.
 - Some of the constraints that need to be faced concerning sea connectivity are: no regular routes connecting Belize's northern cities to its southern cities; quality of maritime transport requires improvement mainly focusing on safety, adherence to schedule by ferries and ports services and facilities.

The different connectivity gaps highlighted result in:

- Low visitor numbers
- Overcrowding at tourism destinations that are easy to reach (mainly due to large numbers of cruise passengers)
- Reduced comfort perception and tourist experience

Given the current situation as regards to national connectivity, Belize requires improvements and enhancements in terms of air, land and sea connections either to tourism destinations or among them. Also, in order to reach tourism goals for 2030 in terms of increased arrivals, connectivity infrastructure development is required to accommodate higher tourist flows.

Vision 2030

Belize will provide tourists with improved and enhanced means and possibilities of arrivals (in terms of quality, quantity and safety issues) to the country and its tourism destination. Belize will offer

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updated international and municipal airports, national and regional roads and piers with enhanced handling capacities and modern facilities/services that meet international safety and comfort standards.

Description of the program

The program consists of three sub-programs which address the improvement and enhancement of the different means of arrival to the country and its tourism destinations:

- ▶ The **Sub-program for Air Infrastructures and transportation improvement** will improve the international airport terminals in terms of infrastructure and facilities and enhance the services offered in order to cater for the expected numbers of tourists travelling to Belize.
- ▶ The **Sub-program for Land connectivity and road infrastructure improvement** improves Belize's insufficient land road infrastructure in terms of quality and safety required by international tourist and therefore improves the transportation standards through the country. In addition, it enhances the access of tourism streams to rural areas and neighboring countries and alleviates the sources for traffic congestions.
- ▶ The **Sub-program for Sea connectivity and transportation improvement** will foster additional connections to further tourism destinations by boat, ferry or water taxi. Additionally the program will enhance tourists' experience when travelling by sea and provide attractive facilities on piers by developing larger pier structures unifying various smaller ones.

Lead stakeholders

MTCAC should be the lead responsible institution for strengthening the implementation of these programs; the Ministry of Transportation will partner with Ministry of Works to execute them by working closely with the respective transportation institutions and companies to identify project prioritization and funding sources.

Objectives

The Belize 2030 objectives of the National Connectivity Development Program are:

- ▶ To increase the tourism satisfaction level by improving the transportation infrastructure, quality of services and safety in facilities used at international and municipal airports
- ▶ To enhance transportation capacity by meeting increasing tourist arrivals and flows
- ▶ To enhance transport safety and reliability by increasing quality and access of Belize's traffic and road conditions
- ▶ To enhance regional tourism flows by enhancing air, land and sea connectivity
- ▶ To enhance safety and visual context of piers by developing a standard pier model.

Milestones

Review Years	Milestones
2015	<ul style="list-style-type: none"> ▶ Investment in enhancing municipal and international airports ▶ National urban traffic tourism model devised ▶ Highway infrastructure improvements started: Western Highway

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	<ul style="list-style-type: none"> Sea tourism connectivity and transportation improvements model developed
2020	<ul style="list-style-type: none"> Telecommunications and banking expansion model for integral development of tourism sites developed Renewed investment in enhancing international airport carried out Renewed investment in enhancing municipal airports carried out Improvements to Northern highway and Manatee road conducted Pier development and management model created
2025	<ul style="list-style-type: none"> Renewed investment in enhancing international airport carried out Enhancements to Southern highway and Hummingbird highway carried out
2030	<ul style="list-style-type: none"> Renewed investment in enhancing international airport carried out

Description of the sub-programs

1.2.1 Sub-program for Air infrastructures and transportation improvement

Description and Projects	Time frame
<p>This subprogram will improve the international airport terminals in terms of infrastructure and facilities and enhance the services offered in order to cater the expected numbers of tourists travelling to Belize. In addition private facilities for private charter air transportation could be implemented if the demand side strives for this development. Hence this would require surveys to high-end / luxury tourists and a cost-benefit analysis.</p> <ul style="list-style-type: none"> Project 1: International airport infrastructure management, improvement and enhancement. This project focuses on the modernization of the international airport infrastructures and facilities. In addition, the handling capacities of the services and the facilities will be enhanced and embellished to meet international standards and to meet the expected tourist arrivals. Therefore Belize City and Riversdale international airports require an: <ul style="list-style-type: none"> Assessment and planning of the new and modernized international airport infrastructure and facilities and A new design incorporating additional space for e.g. aircraft parking slots, passenger terminals (arrivals and departures) by improving signage, improved leisure and information services and shops (food and beverage, souvenirs, tourism information desk) and A strong cooperation between local international airports to define each airport typology. The definition will provide answers to e.g. following questions: airport's targeted airlines and target markets? Handling charter flights or only scheduled flights? Etc. This component requires a strong cooperation of the international airports in order to foster the diverse development and sales strategies for each airport. <i>Note, Placencia/Riversdale international airport:</i> in case that the private sector should not be able to finalize the development or should not be able to ensure the required investment sum, the public sector should guarantee measures to effect completion. For this case, some additional budget is allocated to ensure 	<p>Project 1: Starting date: 2013 Duration total for both airports: 11 years</p> <p>Project 2: Starting date: 2017 Implementation: 14 years</p>

1.2.1 Sub-program for Air infrastructures and transportation improvement

the implementation of Belize's new international airport.

- **Project 2: Domestic airport infrastructure improvement and enhancement.**
This project focuses on the modernization of the domestic/municipal airport infrastructures and facilities and includes the following phases:

- Assessment and planning of the new and modernized the infrastructure and facilities of domestic airports. *E.g.* run way pavement/length/width, drainage system, illumination system of the run ways, security fencing
- Design of additional space for e.g. aircraft parking capacity, passenger terminals (arrivals and departures), tourism information desk.
- Prioritization and scheduling:
 - a) Central Farm: 2017-2019
 - b) Belize City Municipal Airport: 2019 - 2021
 - c) San Pedro Airport: 2021 - 2022
 - d) Placencia Airport: 2021 - 2023
 - e) Caye Caulker Airport: 2023 - 2024
 - f) Punta Gorda Airport: 2025
 - g) Corozal Airport: 2026
 - h) Dangriga Airport: 2028 – 2030

Lead responsible	Strategic partners
PGIA airport Municipal airports Ministry of Transport	Airport Concession company MTCAC BTB
Destinations for implementation	
Project 1: PGIA airport Project 2: Municipal airports: Northern Islands (San Pedro, Caye Caulker), South Eastern Coast Belize (Placencia, Dangriga), Central Coast Belize (Belize City), Northern Belize (Corozal)	
Estimated cost (USD)	Potential financing sources
USD 45,450,000	NSTTF Ministry of Transport Private investors PGIA airport

1.2.2 Sub-program for Land connectivity and road infrastructure improvement

Description and Projects	Time frame
<p>This subprogram improves Belize's insufficient land road infrastructure in terms of quality and safety required by international tourist and therefore improves the transportation standards through the country. In addition, it enhances the access of tourism streams to rural areas and neighboring countries and alleviates the sources for traffic congestions. However, roads and land connectivity that are suggested in this program refer to the development of main access roads. Secondary roads that lead to specific tourism sites and destinations are regarded to be part of the product's infrastructure development. The sub-program includes following projects:</p> <ul style="list-style-type: none"> ▶ Project 1: National urban traffic planning and organization for tourism destinations. This project will restructure the traffic organization including the strategic placement of traffic lights to regulate the traffic and avoid traffic congestions, improve the signage to tourism sites, improve the sewage system along the roads and bridges in flooding areas, includes parking slots and pedestrian sidewalks into the urban planning projects. This project therefore includes three main phases: <ul style="list-style-type: none"> • Assessment and planning of the urban traffic in tourism destinations (pedestrian streets, traffic lights, parking, etc.) • Design and prioritization of project by urban area in tourism destinations • Implementation of the projects, maintenance and restoration on the infrastructure. ▶ Project 2: National land connectivity infrastructure development for tourism destinations. The project will improve the national road conditions by improving the pavements and road quality especially on main highways and rough roads which are and will extensively be used by tourists. <ul style="list-style-type: none"> • Assessment and planning of the national road infrastructure development including signage • Design and prioritization by highway improvements destination: <ol style="list-style-type: none"> i. Western Highway: Needs wider road, signage and lights and reflective lights on pavement. ii. Northern Highway: Needs wider road, signage and lights and reflective lights on pavement. iii. Hummingbird Highway: Needs wider road, two lane bridges, improved bridge conditions, signage and lights and reflective lights on pavement. iv. Southern Highway: Needs wider road, signage and lights and reflective lights on pavement. v. Manatee Road: investment for structuring as a 2-lane highway 	<p>Project 1: Starting date: 2015 Implementation: continuous</p> <p>Project 2: Starting date: 2019 Implementation: continuous</p>
Lead responsible	Strategic partners
Ministry of work	Private companies Municipal governments BTB – product development BTIA, BTGA, BTOA
Destinations for implementation	
Nationwide	

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1.2.2 Sub-program for Land connectivity and road infrastructure improvement

Estimated cost (USD)	Potential financing sources
USD 169,275,000	NSTTF International Trade and Cooperation Agencies Highway fees Public-Private partnerships

1.2.3 Subprogram for Sea connectivity and transportation improvement

Description and Projects	Time frame
<p>Throughout the country sea connectivity is provided to a certain level which is enhanced by implementing this subprogram fostering additional connections to further tourism destinations by boat, ferry or water taxis. Based on the development of new destinations, the sea and river connectivity will be enhanced in order to enable tourists to provide them with additional transportation possibilities for product development purposes. Additionally the sea connectivity and transportation improvement program will enhance the tourists experience when travelling by sea and provide attractive facilities on piers.</p> <p>▶ Project 1: Sea connectivity network management for tourism services. This Project will enhance the sea connectivity to spread tourism flows throughout the country and enhance local means of transportation to main tourism destinations.</p> <ul style="list-style-type: none"> Development of further sea transportation between main tourism destinations by fostering the development of new sea routes and services of water taxis, ferries and nautical tourism facilities Development priorities: <ul style="list-style-type: none"> a) Belize city b) Ambergris/Northern Islands c) Placencia d) Punta Gorda e) Corozal <p>▶ Project 2: Pier model development and management for tourism infrastructure. The implementation of this Project will not only improve the tourist's experience, but also increase the safety of both tourists and inhabitants. The Project unites piers and structures them as tourism man-made attractions offering authentic restaurants, souvenir shops and can also be the departing point for ferries and water taxis.</p>	<p>Project 1: Starting date: 2015 Implementation: continuous</p> <p>Project 2: Starting date: 2016 Implementation: continuous</p>
Lead responsible	Strategic partners
Port Authority Coastal Zone Management	BTB-product development Agricultural & Fisheries BTIA, BTCA, BTGA, BTOA
Destinations for implementation	
Coastal zones	
Estimated cost (USD)	Potential financing sources
USD 11,775,000	NSTTF Multilateral and International support Public-private partnerships

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1.3 Implementation Model

Project/Year	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Program for Basic Infrastructures and Support Services Development																			
Sub-program for Water Management in tourism destinations																			
Project 1: Solid waste model and management for tourism.																			
Project 2: Sewage management for tourism destinations.																			
Project 3: Drainage model and management for tourism.																			
Sub program for non-renewable resource management in tourism																			
Project 1: Fresh water supply and management.																			
Project 2: Energy supply plan and management for tourism.																			
Sub program for Raising awareness and incentives																			
Project 1: Awareness and training																			
Project 2: Incentive program for the sustainable private sector.																			
Sub program for Telecommunication and Banking system																			
Project 1: Telecommunication supply and banking services for tourism																			
Program for Development of the National Connectivity																			
Sub.program for International Air Infrastructures and Transportation Improvement																			
Project 1: International airport infrastructure management, improvement and enhancement.																			
Project 2: Domestic airport infrastructure improvement and enhancement.																			
Sub program for Land Connectivity and Road Infrastructure Improvement																			
Project 1: National urban traffic planning and organization for tourism destinations.																			
Project 2: National land connectivity infrastructure development for tourism destinations.																			
Sub.program for Sea connectivity and transportation improvement																			
Project 1: Sea connectivity network management for tourism services.																			
Project 2: Pier model development and management for tourism infrastructure.																			

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1.4 Cost Model

NOTE: The costs associated with the subprograms and projects under Program for Basic Infrastructure and Support Services in the cost model are in reference to the creation of a model of identification, assessment and management approach to support basic infrastructure and support services development for destination development projects. Investment costs in infrastructure are assumed to be undertaken by integral product development projects. Investments in infrastructure costs for Program for Development of the National Connectivity are considered in the cost model.

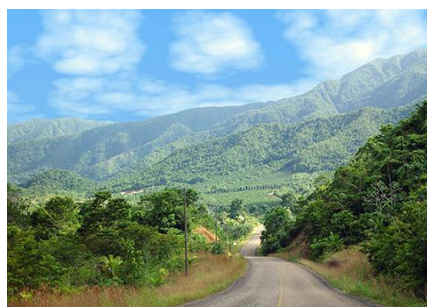
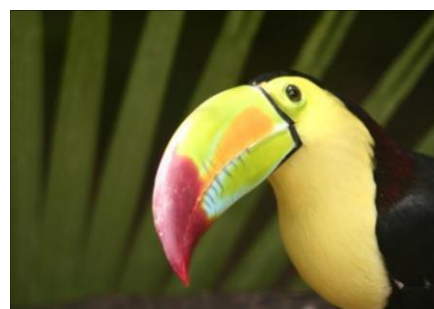
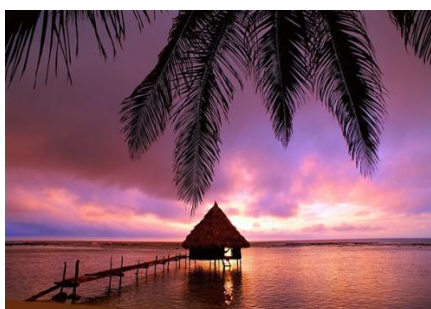
Project/Year	Total (US\$)	2012	2013	2014	2015	2016	2017	2018	2019	2020
Program for Basic Infrastructures and Support Services Development	15,250,000	-	-	1,000,000	750,000	750,000	750,000	750,000	1,350,000	800,000
Sub-program for Water Management in tourism destinations	6,300,000	-	-	600,000	300,000	300,000	300,000	300,000	600,000	300,000
Project 1: Solid waste model and management for tourism.	2,100,000			200,000	100,000	100,000	100,000	100,000	200,000	100,000
Project 2: Sewage management for tourism destinations.	2,100,000			200,000	100,000	100,000	100,000	100,000	200,000	100,000
Project 3: Drainage model and management for tourism.	2,100,000			200,000	100,000	100,000	100,000	100,000	200,000	100,000
Sub program for non-renewable resource management in tourism	4,200,000	-	-	400,000	200,000	200,000	200,000	200,000	400,000	200,000
Project 1: Fresh water supply and management.	2,100,000			200,000	100,000	100,000	100,000	100,000	200,000	100,000
Project 2: Energy supply plan and management for tourism.	2,100,000			200,000	100,000	100,000	100,000	100,000	200,000	100,000
Sub program for Raising awareness and incentives	4,000,000	-	-	-	250,000	250,000	250,000	250,000	250,000	250,000
Project 1: Awareness and training	2,400,000				150,000	150,000	150,000	150,000	150,000	150,000
Project 2: Incentive program for the sustainable private sector.	1,600,000				100,000	100,000	100,000	100,000	100,000	100,000
Sub program for Telecommunication and Banking system	750,000	-	-	-	-	-	-	-	100,000	50,000
Project 1: Telecommunication supply and banking services for tourism	750,000								100,000	50,000
Program for Development of the National Connectivity	226,500,000	-	2,500,000	2,500,000	300,000	3,150,000	5,150,000	3,650,000	4,650,000	26,150,000
Sub-program for International Air Infrastructures and Transportation Improvement	45,450,000	-	2,500,000	2,500,000	-	1,000,000	3,000,000	3,000,000	4,000,000	5,500,000
Project 1: International airport infrastructure management, improvement and enhancement.	30,500,000		2,500,000	2,500,000	-	1,000,000	2,000,000	2,000,000	2,000,000	4,500,000
Project 2: Domestic airport infrastructure improvement and enhancement.	14,950,000						1,000,000	1,000,000	2,000,000	1,000,000
Sub program for Land Connectivity and Road Infrastructure Improvement	169,275,000	-	-	-	150,000	75,000	75,000	75,000	75,000	20,075,000
Project 1: National urban traffic planning and organization for tourism destinations.	1,275,000				150,000	75,000	75,000	75,000	75,000	75,000
Project 2: National land connectivity infrastructure development for tourism destinations.	168,000,000									20,000,000
Sub-program for Sea connectivity and transportation improvement	11,775,000	-	-	-	150,000	2,075,000	2,075,000	575,000	575,000	575,000
Project 1: Sea connectivity network management for tourism services.	1,275,000				150,000	75,000	75,000	75,000	75,000	75,000
Project 2: Pier model development and management for tourism infrastructure.	10,500,000					2,000,000	2,000,000	500,000	500,000	500,000
TOTAL BUDGET INFRASTRUCTURE MACRO PROGRAM	241,750,000	-	2,500,000	3,500,000	1,050,000	3,900,000	5,900,000	4,400,000	6,000,000	26,950,000

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Project/Year	Total (US\$)	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Program for Basic Infrastructures and Support Services Development	15,250,000	800,000	800,000	800,000	850,000	1,300,000	800,000	800,000	800,000	1,350,000	800,000
Sub-program for Water Management in tourism destinations	6,300,000	300,000	300,000	300,000	300,000	600,000	300,000	300,000	300,000	600,000	300,000
Project 1: Solid waste model and management for tourism.	2,100,000	100,000	100,000	100,000	100,000	200,000	100,000	100,000	100,000	200,000	100,000
Project 2: Sewage management for tourism destinations.	2,100,000	100,000	100,000	100,000	100,000	200,000	100,000	100,000	100,000	200,000	100,000
Project 3: Drainage model and management for tourism.	2,100,000	100,000	100,000	100,000	100,000	200,000	100,000	100,000	100,000	200,000	100,000
Sub program for non-renewable resource management in tourism	4,200,000	200,000	200,000	200,000	200,000	400,000	200,000	200,000	200,000	400,000	200,000
Project 1: Fresh water supply and management.	2,100,000	100,000	100,000	100,000	100,000	200,000	100,000	100,000	100,000	200,000	100,000
Project 2: Energy supply plan and management for tourism.	2,100,000	100,000	100,000	100,000	100,000	200,000	100,000	100,000	100,000	200,000	100,000
Sub program for Raising awareness and incentives	4,000,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000
Project 1: Awareness and training	2,400,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000
Project 2: Incentive program for the sustainable private sector.	1,600,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
Sub program for Telecommunication and Banking system	750,000	50,000	50,000	50,000	100,000	50,000	50,000	50,000	50,000	100,000	50,000
Project 1: Telecommunication supply and banking services for tourism	750,000	50,000	50,000	50,000	100,000	50,000	50,000	50,000	50,000	100,000	50,000
Program for Development of the National Connectivity	226,500,000	24,300,000	24,300,000	24,150,000	19,400,000	21,850,000	17,550,000	10,650,000	11,250,000	11,250,000	13,750,000
Sub-program for International Air Infrastructures and Transportation Improvement	45,450,000	3,650,000	3,650,000	3,500,000	2,750,000	5,200,000	900,000	-	600,000	600,000	3,100,000
Project 1: International airport infrastructure management, improvement and enhancement.	30,500,000	1,000,000	2,000,000	2,000,000	2,000,000	4,500,000	-	-	-	-	2,500,000
Project 2: Domestic airport infrastructure improvement and enhancement.	14,950,000	2,650,000	1,650,000	1,500,000	750,000	700,000	900,000	-	600,000	600,000	600,000
Sub program for Land Connectivity and Road Infrastructure Improvement	169,275,000	20,075,000	20,075,000	20,075,000	16,075,000	16,075,000	16,075,000	10,075,000	10,075,000	10,075,000	10,075,000
Project 1: National urban traffic planning and organization for tourism destinations.	1,275,000	75,000	75,000	75,000	75,000	75,000	75,000	75,000	75,000	75,000	75,000
Project 2: National land connectivity infrastructure development for tourism destinations.	168,000,000	20,000,000	20,000,000	20,000,000	16,000,000	16,000,000	16,000,000	10,000,000	10,000,000	10,000,000	10,000,000
Sub-program for Sea connectivity and transportation improvement	11,775,000	575,000	575,000	575,000	575,000	575,000	575,000	575,000	575,000	575,000	575,000
Project 1: Sea connectivity network management for tourism services.	1,275,000	75,000	75,000	75,000	75,000	75,000	75,000	75,000	75,000	75,000	75,000
Project 2: Pier model development and management for tourism infrastructure.	10,500,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000
TOTAL BUDGET INFRASTRUCTURE MACRO PROGRAM	241,750,000	25,100,000	25,100,000	24,950,000	20,250,000	23,150,000	18,350,000	11,450,000	12,050,000	12,600,000	14,550,000

NATIONAL SUSTAINABLE TOURISM MASTERPLAN FOR BELIZE 2030

National Tourism Marketing Macro Program



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1 National Tourism Marketing Macro Program

Description

The marketing development macro program structures actions to optimize the different promotion and communication efforts toward the local and international markets.

Actions area divided into three programs:

- I. Strategic marketing
- II. Tourism marketing network
- III. Operational marketing

The strategic marketing starts with the strategic plan and an intelligence system, as the two main tools to define strategies and country guidelines for marketing. Then it provides the framework to make products marketable, according to the overall philosophy of the NSTMP of Belize. Finally it considers civil awareness about tourism a key asset to reach in order to generate the appropriate climate for a complete tourism experience.

The marketing network organizes the contact points to reach the market, either at the source markets or in the destination once in Belize.

The third program is focused to make the marketing strategies operational. It contents communication, travel trade and promotional activities. Furthermore, it has a specific sub-program to follow up all new technologies trends and opportunities for marketing. This program also includes a specific sub-program to increase and ease connectivity of Belize in all transport means (air, sea, land), which will lobby for new connections and frequencies, as well as conditions to operate in Belize.

It is important to mention that this NSTMP for Belize states and defines the strategic framework where operational activities and tactical decisions should be taken. These activities include source markets and segment treatments; decisions on specific tools or tasks to be done under promotion (such as trade fairs participation, road shows, etc). Also, within this plan, there is a special instruction for developing in a regular basis every year, an Operational Marketing Plan, where all the specific tasks and tactical decisions have to raise up.

Furthermore, it is important to keep the long term vision for marketing development, which is:

1. Maintain and manage MIS system as a key tool for successful marketing
2. Renew operational marketing every year and strategic marketing plan every 5 years
3. Keep product development approach

Objectives

- ▶ Position Belize as a World Class tourism destination
- ▶ Increase tourism arrivals, overnights, direct revenue and average length of stay from the international and national tourism market
- ▶ Raise the general awareness on the destination products
- ▶ Enhance the overall visitor experience traveling to Belize

1.1 Strategic Marketing Program

Gaps identified – Diagnostic

The diagnostic analysis identified that Belize's competitiveness in tourism, compared with other countries, is weak based on:

- ▶ A low market share of visitor arrivals;
- ▶ Tourist consumption of few tourism products
- ▶ A weak level of marketing and commercialization
- ▶ Weak and unfocussed strategic and operational tourism marketing plan
- ▶ Feeble tourism brand

Vision 2030

By 2030, Belize's strategic and operational tourism marketing will be based on statistical data in order to better target existing and new markets and segments. Each tourism product will have its brand and sub-brands which will signal the expected quality and performance. The tourism product clubs will have structured the national tourism offer into different sub-clubs which will have increased the product quality and will cater to the expectations of the market customers.

Description of the program

This program serves the strategic objective of "Competitiveness". Hence, it intends to provide a competitiveness framework when promoting Belize's tourism products versus the competitor's destinations. This is also the framework used for matching product development with arrivals, on a demand oriented basis.

Even though Belize already has a consolidated action plan for tourism promotion led by BTB, it is important to state the need to keep strategic marketing in mind during the next twenty years. Without the strategic marketing framework there is a strong risk of underutilizing resources, losing opportunities or misunderstanding what to offer and promote to which markets. This strategic marketing program has to provide answers and guidelines to avoid these risks on an on-going basis.

The program is composed of the following sub-programs:

- ▶ **Marketing Intelligence Management:** creation of a Tourism Observatory for market intelligence as a key tool to optimize decisions and orient investments for tourism development in the country.
- ▶ **Belize Tourism Positioning Management:** Once the market oriented strategic plan is settled, a critical component for marketing is the definition and positioning of a tourism concept for Belize, its tourism products and destinations.
- ▶ **Tourism Product Clubs Development Framework:** As a strategic tool to develop quality and commercial products through a business adherence program that creates a network of business based on a product club concept and standard quality criteria.
- ▶ **Tourism Awareness Development:** broad tourism awareness campaigns for raising pride in Belizean culture and esteem of foreign visitors, an important aspects of the tourism experience.

National Sustainable Tourism Master Plan for Belize 2030 • National Tourism Marketing Macro Program

Lead stakeholder

BTB Marketing Department and Product Development Department will be the main stakeholder to develop strategic and operational models to implement the suggested program.

Objectives

- ▶ To improve tourism intensity (arrivals, ALOS, expenditure) by having a clear strategic targets for marketing through the development of an efficient Marketing Intelligence System
- ▶ To optimize resources by improving the cost/benefit ratio of tourism marketing actions
- ▶ To increase product visibility and quality by developing product clubs with their product families / concepts
- ▶ To position Belize as a World Class tourism destination by creating a known/recognized tourism brand
- ▶ To expand domestic tourism travel by developing specific awareness and promotional campaigns.

Milestones

Review Years	Milestones
2015	<ul style="list-style-type: none"> ▶ Strategic marketing plan vision 2020 completed ▶ MIS installed ▶ Belize Umbrella Brand created ▶ Awareness campaigns under progress.
2020	<ul style="list-style-type: none"> ▶ Strategic marketing plan vision 2025 completed ▶ Awareness campaigns under progress.
2025	<ul style="list-style-type: none"> ▶ Strategic marketing plan vision 2030 ▶ Belize Umbrella Brand revised/updated/changed. ▶ Product Clubs already working. ▶ Awareness campaigns under progress.
2030	<ul style="list-style-type: none"> ▶ Strategic marketing plan updated vision 2035 ▶ Product Clubs already working. ▶ Awareness campaigns under progress.

Proposed subprograms and projects

1.1.1 Sub-program for Marketing Intelligence Management	
Description and Projects	Time frame
<p>This project structures the undertaken market researches, gathers and analyses the data, prepares a bulletin and finally transforms the information into a decision-making process.</p> <ul style="list-style-type: none"> ▶ Project 1: Strategic Marketing Plan. A Strategic Marketing Plan has to be done to provide overall guidelines for marketing activities. This Plan has to be assessed and updated every 4 years, in order to keep the pace of market trends and tourism products, as well as other competitors news. The Plan must have: 	<p>Project 1. Starting date: 2012 Implementation: Every fifth year a new</p>

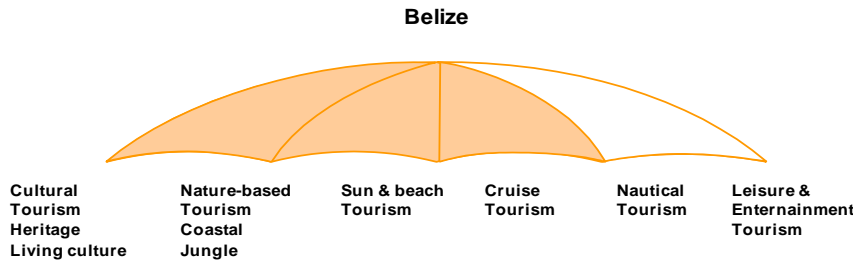
1.1.1 Sub-program for Marketing Intelligence Management

<ul style="list-style-type: none"> • The strategic vision • Tourism positioning • Market and segment strategies • Tourism product strategies • Competitor's monitoring • Promotion and commercial strategies • Periodic monitoring and assessment system <p>► Project 2: Marketing intelligence system – MIS. BTB or the corresponding authority should define the short and long term requirements of data and information for its strategic decisions. Also, it has to consider all possible needs of tourism sector in Belize, in order to create a database of profit for the whole sector. This MIS has to measure key indicators performance, which will be defined by the responsible authority and the stakeholders, according to the specific strategic and operational needs. MIS is a key tool for tourism management, either for public administration or private decisions. Without information neither successful decision nor competitive plans can be made. Also, one of the key functions of the MIS will be to share information, since it is the main purpose of its creation. Even though good analysis and data is gather, if it is not share it has no value for tourism development. Finally, this MIS has to be fully aligned with the Tourism Satellite Account program, in order to look for and share data and information. This system will be focused on providing information strictly relevant for tourism industry businesses rather than macro-economics. At least the following tasks should be done within this project:</p> <ul style="list-style-type: none"> • Assess the model to follow for the Marketing Intelligence System: define if there will be a simple unit within BTB that will be in charge or if there will be a whole department or institution to hold this MIS. It will be a complete database with strong frameworks and supporting the whole sector, or if it will be an autonomous institute providing services and doing research under business models (i.e. tourism observatory). It has to be defined the scope and structure of the MIS, roles and processes, ways of self funding or financial solutions, etc. For that, an assessment of model options must be done. • Business plan for MIS: once the MIS working framework and model is done, it is important to specify the scope and the kind of activities it has to do. An overall feasibility assessment has to be done, either if the MIS will be fully financed by government or if it will function with self financing methods (partnerships, sale of reports, sponsorship, etc.). • Implementing, monitoring & reporting: to implement the MIS, a set of data and framework has to be defined. The framework will be a supporting tool to host the database and to manage information. Then, in order to create and get the data, there will be studies, reports and research to do, which will have specific budgets for purchase, hire or do. Then, a set of basic indicators has to be settle, which will serve as monitoring indicators for the whole NSTMP and other key plans for the country. This task has to be updated in terms of indicators and new insertions, according to the needs of knowledge and refinements during implementations. It also must: <ul style="list-style-type: none"> • Verify the relevance of reports produced by the market intelligence system. • Transmit the results of the reports to the relevant public and private tourism organizations in order to monitor competitors, performances or markets, destination image, monitor sector performance, visitor impacts, visitor feedback, etc. • Improve the market intelligence system to provide the tourism industry with the needed data for development and decision making 	<p>plan has to be assessed and updated</p> <p>Project 2. Starting date: 2012 Implementation: continuous</p>
Lead Responsible	Strategic Partners
BTB	BHA All private stakeholders/associations Statistical Institute of Belize

1.1.1 Sub-program for Marketing Intelligence Management

Immigration department	
Destinations for implementation	
Belize	
Estimated cost	Potential financing sources
Project 1. Five plans, 150.000 USD each. Total 750.000 USD. Project 2. Definition model and business plan: 200.000 USD. Implementing yearly: 150.000 USD.	Joint venture private/public Multilateral donors

1.1.2 Sub-program for Belize Tourism Positioning Management

Description and Projects	Time frame
<p>The tourism destination of Belize will require a revise and update brand identity and image to be established and communicated. It will help Belize to be positioned in the minds of the customer and hence create a differentiation criterion. This will provide a mean for a successful differentiation from its competitors. The brand finds its way to the potential or current costumers minds and is directly associated with specific images, sounds, adjectives, etc.</p> <p>► Project 1: Brand development. This project is composed at least of the following tasks:</p> <ul style="list-style-type: none"> • Belize Tourism Brand: to create a successful umbrella brand identity by integrating Belize's brand mission, vision, philosophy, brand identity/essence statement. This brand has to communicate the different values, elements, key factors (functional, emotional and social components), and express the expected symbols for the market. It has to be translated into a design and logo of the brand. This brand will require all the guidelines for implementation and auditing, in order to be loyal to the brand's philosophy. • Declinations: define declination brands for tourism products or destinations within Belize hence sub-brands per tourism product/ tourism destinations ie. Cayo as the adventure capital), or consider also the possibility of a specific positioning strategy or brand, if needed for a targeted source markets. This will get the benefits from the umbrella brand but at the same time it will differentiate Belizean tourism products and destinations in the country. Each sub-product would then have a own brand and own marketing activities to be developed and scheduled. <p style="text-align: center;">Belize</p>  <p>► Project 2: Brand management and brand manual. Different measures have to be settled in order to manage and monitor the brands:</p> <ul style="list-style-type: none"> • Create a brand manual which describes specifically all use of the logos and brand images and how to decline the design according to the product and the use of the brand image (Power Point, print advertisement, etc) • Develop the brand awareness. Stakeholder's brand education and communication will enhance the stakeholders' level of awareness and understanding of the rationale behind the brand's identity and strategy. • Regular assessment of Tourism Brand, at least every two years, in order to 	<p>Project 1. Starting date: 2012 Duration: 1 year Revision of the brand 2022</p> <p>Project 2. Starting date: 2013 Implementation: Continuous</p>

1.1.2 Sub-program for Belize Tourism Positioning Management

monitor any change in brand's positioning or competitiveness perception of the whole destination. Monitor the brand use by different tourism stakeholders in their promotion tools such as advertising, public relations, direct marketing, etc. Monitor the effectiveness and the performance of the destination's brand campaign, the level of brand awareness, etc. Implement changes and improvements according to the results of the monitoring process	
Lead Responsible	Strategic Partners
BTB	Tourism private stakeholders/BTIA/ BHA
Destinations for implementation	
Nationwide	
Estimated cost (USD)	Potential financing sources
Brand development: 70.000 USD per brand development, assuming 2 brands in 20 years, total 140.000 USD. Brand management: 15.000 USD every year; 100.000 assessment every 5 years	Joint venture private/public sector Public budget

1.1.3 Sub-program for Tourism Product Clubs Development Framework

Description and Projects	Time frame
<p>This project develops product clusters of public and private tourism service providers sharing the same customer target (luxury and family), the same product market (nature tourism, cultural tourism, cruise tourism, etc); the same type or the same category. The aims of the clubs are to structure the touristic offer and to help increase quality, in such a manner to provide easy marketable products and answer the expectation of the market customers. The quality is reached by a set of membership standards that have to be accomplished, if any company or destination wants to be part of the club. The projects involved within this sub-program are, at least, the following:</p> <ul style="list-style-type: none"> ▶ Project 1. Product club development manual – Management guidance. This guide book should be developed by the public and private organizations taking part to the clubs in order to match the expectation of each side. It should be available in hand and soft copy. The manual has to be developed once according to the Belizean characteristics. Then every new club can develop their own Club manual, following all the guidelines from this book. Clubs should have a guide of the operational and legal procedures and practical information. Each procedure will define how to achieve the tasks of the clubs such as: <ul style="list-style-type: none"> • Market study and identification of market opportunities • Process of club creation: key values and concepts for the club, business model, benefits and value added for members and clients, etc. • Management and operation procedures • Evaluation and follow up of the club results ▶ Project 2. Tourism product club development. The following process proposed is adapted to obtain dynamic and attractive clubs to customers and companies. This project aims to create marketable and successful product clubs following the process below: <ul style="list-style-type: none"> • Coordination of the initiative by the product manager of BTB • Use of market studies to define adapted clubs to the industry 	<p>Project 1. Starting date: 2020 Implementation: just once with possible updates along time</p> <p>Project 2. Starting date: 2021 Implementation: continuous</p>

National Sustainable Tourism Master Plan for Belize 2030 • National Tourism Marketing Macro Program

1.1.3 Sub-program for Tourism Product Clubs Development Framework

<ul style="list-style-type: none"> • Identification of club concepts that has a specific market needs • Identification of company prerequisites to join a club – The club must welcome tourism companies and organizations with a minimum of quality requirement • Identification of the activities and benefits of the club to members - The tourism industry and each club member will benefit from clubs by the creation of network between tourism providers and increase of information flow exchange between tourism professionals. This tourism platform will facilitate product creation and the targeted commercialization. • Selection of the different promotion channels for the club (brochure, roadshow, website, etc) • Management of the schemes and definition of roles • Identification of the type of business to be represented and integrated to the clubs 	
Lead Responsible	Strategic Partners
BTB – Product development managers	Private tourism companies/Associations Destinations NGOS BHA – BTIA – BCIA – BTOA – BTGA
Destinations for implementation	
Nationwide	
Estimated cost (USD)	Potential financing sources
Project 1: 90.000 USD Project 2: 100.000 USD per year	Membership fee from clubs Private/Public incentives

1.1.4 Sub-program for Tourism awareness development

Description and Projects	Time frame
<p>Sustainable tourism development in Belize is a responsibility of everyone: civil society, public and private sector. Campaigns with national coverage should be undertaken to inform citizens and raise their awareness on the importance of tourism and tourism hospitality. In addition, a civic pride campaign should promote the uniqueness, protection and the importance to conserve the national Natural and Cultural heritages of Belize (either monuments or living culture and nature) while encouraging Belizeans to travel and visit destinations within their country. This sub-program will be the umbrella under which the government should address domestic tourism. Projects should be conducted and reviewed periodically.</p> <p>► Project 1: Tourism awareness campaigns definition.</p> <ul style="list-style-type: none"> • Definition of different campaigns per year: identification of awareness needs and key audiences to tap; definition of goals and strategies; definition of messages per target and communication tools for each one; definition of seasons and days for domestic tourism campaigns. • Define the strategic partners per campaigns, such as public-private partnership with local tourism companies • Define implementation schedule of each campaign • Define the financial schemes and alternatives for funding. • Definition of the campaigns, such as: <ul style="list-style-type: none"> • <i>Belizeans first</i>: this project designs the specific campaigns to encourage domestic travels within the country, intending to transmit the importance for 	<p>Project 1: Starting date: 2012 Implementation: Continuous until absence of needs of awareness (estimated 15 years)</p>

1.1.4 Sub-program for Tourism awareness development

<p>the Belizeans to be the first ones to know and feel their country, so that they can take care of it appropriately for other kind of tourism markets coming during the next twenty years.</p> <ul style="list-style-type: none"> • <i>Tourism for good.</i> This project designs a national tourism awareness program to raise the nationwide understanding for tourists and tourism and the resulting economic, social and environmental benefits. • <i>Tourism awareness in schools.</i> This project could promote the national importance of tourism among young people and highlight the career opportunities in tourism • <i>Community awareness.</i> This action could help the community to understand the need of the tourism industry in Belize and the benefits of this industry to the local community. Seminars could be organized in first place in high density touristic areas such as the Fort George Area which is the cruise ship harbor area. • <i>Sustainable tourism awareness.</i> This project plans and programs on sustainable tourism for the population of the tourist destinations aimed at promoting and disseminating a culture which respects environment, natural resources and the cultural heritage of the country, by strengthening the national identity and pride. • <i>Belizeans host.</i> This project develops training programs on customer service techniques for staff not directly employed in the tourism industry but who have contact with tourists, giving priority to those who work in transportation sector, at airports and in shops. • Monitoring system for campaigns: <ul style="list-style-type: none"> i. Implementation of periodical assessment of projects and tasks i. Development of assessment tools and mean. ii. Improvement of the methods and campaigns 	
Lead Responsible	Strategic Partners
BTB	Schools (public and private) City hall NGO's Universities/UTC/ vocational training school BHA – BTIA – BCIA – BTOA - BTGA
Destinations for implementation	
Belize National Territory	
Estimated cost (USD)	Potential financing sources
Costs based on 10 campaigns in small (small workshops, courses, etc.) and big (advertising, big boards, etc.) formats: 370.000 per year the five first years, and 50% reduction the following 10 years.	Joint ventures- Public-private partnership

1.2 Program for Tourism Marketing Network

Gaps identified – Diagnostic

The diagnostic analysis identified that Belize's tourism information and communication channels are insufficient and do not spread information as efficiently as they could. However, with increased income generated through tourism, image promotion and communication of Belize's tourism can be enhanced.

To create a good marketing and image-promotion network is a major effort that has to be made to reach target visitors. At the same time, this network provides a good opportunity to collect information from source markets. The program aims to develop the national and international representation of the destination and support the data collection system.

Vision 2030

Belize's tourism industry will offer various information distribution channels such as Tourist Visitor Centers, Tourist Welcome Centers and an international promotion and sales office network in different countries, destinations and strategic areas.

Description of the program

This program intends to provide a promotional framework, centered on information and operations, for use in promoting Belize's tourism products to national and international markets and segments.

- ▶ The sub-program for **promotion network in Belize** – tourism visitor centers defines, conceptualizes and develops information and welcome centers at tourism destinations and strategic points
- ▶ The sub-program for **international tourism marketing offices** will develop an international tourism marketing and representation network which will market and promote Belizean tourism at the market origin

Lead stakeholder

The main stakeholder will be BTB strategic management department which will evaluate and develop the promotional network and hubs both within Belize and in important tourism source markets. Partnership with local stakeholders, Belizean "ambassadors" and international representatives are essential for the success of this program.

Objectives

- ▶ To enhance local income generated through tourism by enhancing the tourist's access to local product offering and services information
- ▶ To enhance international tourist arrivals by promoting and communicating Belize as a tourism destination from international offices/representations in the most important source markets.

National Sustainable Tourism Master Plan for Belize 2030 • National Tourism Marketing Macro Program

Milestones

Review Years	Milestones
2015	▶ 4 TIC's and 1 TWC done and operating
2020	▶ 4 extra TIC's and 5 extra TWC done and operating; International marketing offices implemented and operating
2025	▶ 3 extra TWC done and operating; International marketing offices implemented and operating
2030	▶ Maintenance and monitoring of TVC's and International marketing offices

Proposed subprograms and projects

1.2.1 Sub-program for Promotion network in Belize – tourism visitor centers	
Description and Projects	Time frame
<p>This program will develop various Tourism Visitor Centers, with the main criteria of promoting Belize tourism destinations and products once the visitor is already in Belize. There will be at least two kind of TVC:</p> <ul style="list-style-type: none"> • Tourism Information Center (TIC): The primary task of the centers is to welcome, inform and support tourists by providing information on the destination. • Tourism Welcome Center (TWC): depending on the tasks agreed upon, the centre can also undertake further marketing and/or management tasks, and have an interactive exhibition related to the specific destination it is located in (tourism product or area) <p>▶ Project 1: Definition and conceptualization of TVC's.</p> <ul style="list-style-type: none"> • Design of the tasks that each TVC will undertake. <i>E.g.</i> Information, tourism statistics, product development, industry representation, marketing and promotions, etc. • Definition of the management scheme and involved team • Design of possible financing models (extra leisure services such as cafeteria, restaurants, grocery, bookings, etc.) • Definition of the concept of each center. Some centers could join a TIC and TWC at the same location or each center could be only a TIC or TWC • Creation of guidelines to design each kind of TVC, and specifically the exhibitions of the TWC <p>▶ Project 2: TVC development and implementation.</p> <ul style="list-style-type: none"> • Selection of sites for TVC: these facilities should be placed in strategic locations such as airport, cruise terminal, border offices and major tourist attractions of the country. First locations to be considered for TWC: <ul style="list-style-type: none"> • <u>Central coast Belize</u>: Airport and cruise terminal (TWC and TIC focused on tourism in Belize) • <u>South Eastern Coast</u>: TWC with full services for pocket cruisers, nautical passengers, and exhibition to illustrate pristine beaches, jungle activities and the living culture (gastronomy, Garifuna, etc.). • <u>Northern Islands</u>: Airport and water taxi terminal (TWC and TIC focused on water based tourism activities) • <u>Belize reef</u>: focused on sustainability, code of conducts in the reef, on diving and sailing experience • <u>Southern Belize</u>: focused on pristine beaches, archeological sites, living culture, Cacao and Coffee plantations. • Training: training of staff on tourism products and destination subjects, tourism offering in the area. Training of required capacities, <i>e.g.</i> Website development and maintenance; Brochure design and distribution, foreign language skills, 	<p>Project 1: Starting date: 2013 Implementation: 2013</p> <p>Project 2: Starting date: 2014 Implementation: 2014: 2 TIC's 2015: 2 TIC's and 1 TWC 2016: 2 TIC's and 1 TWC 2017: 2 TIC's and 1 TWC 2018: 1 TWC 2019: 1 TWC 2020: 1 TWC 2021: 1 TWC 2022: 1 TWC</p>

National Sustainable Tourism Master Plan for Belize 2030 • National Tourism Marketing Macro Program

1.2.1 Sub-program for Promotion network in Belize – tourism visitor centers

<p>statistics and visitor survey interpretation tools.</p> <ul style="list-style-type: none"> Logistics: coordination with BTB head offices for collaterals provision, news, information, specific sales and offerings, etc. Business models definition and plans: first, every TVC will require a clear definition of its business units (cafeteria, restaurants, souvenir shops, fee per brochure, booking commissions, tour guiding, book guides, sponsorships, renting and leasing of spaces at the TVC, etc.). Then, based on those units, they will require a business plan, in order to receive incomes to cover TVC expenses. In all of them, the priority will be to find out self-sustainable funding. 	
Lead Responsible	Strategic Partners
BTB	BTIA, BTOA, BTGA, BHA Local governments NGO's
Destinations for implementation	
<p>TICS: Airports, board crossing, Main tourism hubs TWC: phased in by priority available and ease of implementation</p>	
Estimated cost (USD)	Potential financing sources
<p>Project 1: 50.000 Project 2: 8 TIC's: 400.000 8 TWC's: 1.200.000 Total cost: 1.6 millions</p>	<p>Business units Hotel & taxes business City hall Regional government Private associations such as BTIA, BTOA, BTGA</p>

1.2.2 Sub-program for International tourism marketing offices

Description and Projects	Time frame
<p>This subprogram will develop an international tourism marketing and representation network. It will market and promote Belizean tourism at the market origin, inform the customers and intermediaries on their travel possibilities and the tourism offer in Belize.</p> <p>► Project 1: Definition of international marketing network map.</p> <ul style="list-style-type: none"> Definition of office/representation model: according to budget and market priorities, the first step is to define the kind of office model among the following options: <ul style="list-style-type: none"> <i>BTB satellite offices:</i> international BTB offices in important source markets (could be one or various team members). <i>E.g. BTB office in New York, in London</i> <i>Tourism Trade Representative:</i> a representative is already working in a Belizean governmental entity in foreign markets, <i>e.g. Tourism representative in Belize's embassy in Washington D.C.</i> <i>Destination Marketing and PR Company</i> offer destination marketing services for National and Regional Tourism Organizations to increase their sales in a specific market. <i>E.g. BTB contracts a UE-based specialized destination marketing and PR company to undertake marketing and promotional activities.</i> Selection of source markets for offices: identification of priority markets and specific locations (cities), where to settle the defined marketing office. Assessment and revision of network map every 4 years, in order to optimize efforts and resources, redefine the priorities and office models, according to trends, market's changes and competitiveness situation. 	<p>Project 1: Starting date: 2015 Implementation: Continuous every year No cost: internal cost</p> <p>Project 2: Starting date: 2015 Implementation: 2015</p> <p>Project 3: Starting date: 2016 Implementation: continuous</p>

1.2.2 Sub-program for International tourism marketing offices

<p>► Project 2: Business plan and manuals for each office.</p> <ul style="list-style-type: none"> • Elaboration of internal structure according to specific market features, roles and functions: e.g. Marketing Department, Membership and Product Development Department, Public Relations and Press Department, Finance Department, Information Department • Business models assessments: self-financing models; sources; opportunities. • Identification of possible locations and workspaces related with national identities. • Development of operational manuals, with procedures, management, reporting and monitoring guidelines. Definition of tasks that each office will undertake (B2B and B2C). E.g. political lobbying, distribution of tourism information, source market profile and statistics on current and potential tourists to Belize, linking the foreign tourism industry with the Belizean tourism industry and BTB and fostering partnerships and travel arrangements, marketing campaigns, etc <p>► Project 3: Office network management.</p> <ul style="list-style-type: none"> • Bid and contracting of office organization (staff, company, etc.). • Elaboration of annual goals, operations, budget, marketing and financing plan by source market • Training of new employees: Training on the tourism products offered at the destinations; Training of required capacities, e.g. foreign language skills, marketing, PR and operational skills, usage of new technologies for the implementation of e-marketing tools, political lobbying. • Meeting and reporting annual agenda, to revise results and set the followings goals • Monitoring of the effectiveness of marketing actions (annual cost-effectiveness calculation) 	
Lead Responsible	Strategic Partners
BTB	Private tourism stakeholders; BTIA, BHA Ministry of Foreign Affairs
Destinations for implementation	
Priority source markets: <i>USA, Canada, Germany, United Kingdom, France, Benelux, Italy.</i>	
Estimated cost (USD)	Potential financing sources
Project 1: - Project 2: 100.000 USD, based on 6 offices Project 3: 180.000 USD per office per year, based on 6 offices, 1.080.000 USD per year	Public and private partnerships

1.3 Program for Operational Marketing

Gaps identified – Diagnostic

- ▶ Lack of dynamic market segmentation strategy for marketing and commercialization targets
- ▶ Need of mid-term strategic and operational tourism marketing plan
- ▶ A low number of information channels provided to tourists once arrived in Belize's tourism destinations
- ▶ Limit arrival direct access routes and visa requirements for untapped markets
- ▶ Little use of innovative tools and new technologies for the promotion of Belize's tourism products and tourism industry.

Vision 2030

By 2030, Belize will have developed communication and promotion activities enhanced channels and methods of communication in order to improve distribution effectiveness, to disseminate information and to reach target markets and segments more successfully. Use of dynamic market segmentation to target niche markets leveraged through enhanced market information systems and innovative tools to create a direct communication connection with Belize's tourists.

Description of the program

- ▶ The **sub-program for communication and promotion** develops tourism marketing actions to increase the destination awareness worldwide and the direct potential sales. This should be planned according to the strategic marketing plan, and also monitored by the MIS.
- ▶ The **sub-program for marketing with new technologies** will develop opportunities including the usage of innovative tools for tourism marketing (i.e. enhanced reality, role games, holograph, helmet vision, 3D devices, etc.).
- ▶ The **sub-program for sales and commercialization** will focus on the usage of adequate commercial channel opportunities, in order to increase business sales using new formats and tools.
- ▶ Finally, the **sub-program of national connectivity** will focus on maintaining transport connections at the most developed level possible using all means of arrival in Belize (sea, air, land); and according to the development and capacity of the whole destination along time.

Lead stakeholder

The main stakeholder will be BTB strategic marketing department which will evaluate and develop the communication and promotion tools and technologies in order to feed markets and segments with the most relevant information for the market/segment. Furthermore, BTB will also be the institution striving and promoting Belize's tourism destinations to international flight companies.

Objectives

- ▶ To optimize cost/benefit ratio of marketing actions
- ▶ To increase business sales by structuring BTB's new commercial booking possibilities
- ▶ To enhance arrivals to Belize through improved connectivity
- ▶ To position Belize as a World Class destination through targeted publicity
- ▶ To enhance visitor satisfaction through effective use of CRM models

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Milestones

Review Years	Milestones
2015	<ul style="list-style-type: none"> ▶ Annual operational marketing activities and plans complete ▶ Tourism website updated and improved ▶ New technologies used as marketing tools ▶ Active committee for connectivity is fully operative and working.
2020	<ul style="list-style-type: none"> ▶ Annual operational marketing activities and plans complete ▶ CRM implemented ▶ New commercialization channels used and implemented ▶ Improved market connectivity.
2025	<ul style="list-style-type: none"> ▶ Monitoring and assessment of entire program
2030	<ul style="list-style-type: none"> ▶ Monitoring and assessment of entire program

Proposed subprograms and projects

1.3.1 Sub-program for Communication and promotion	
Description and Projects	Time frame
<p>Communication and promotion tools aim to advertise the destination to intermediaries and potential consumers. The following projects amplify the ongoing Belize campaigns by using new channels and methods of communication.</p> <ul style="list-style-type: none"> ▶ Project 1: Advertising, Communications and Merchandising Material. Creation of advertising and communications material with a consistent message of the tourism brand and the products. A similar advertising message across different media and the use of the different symbols and logo of the Belize brands create synergy between online and offline channels, such as: <ul style="list-style-type: none"> • Tourism product brochures and niche segment brochures for the target markets in their language. • Electronic brochures, product and segment sites, online booking systems, etc. • Merchandising material, e.g.: calendars, tea cups, lanyards, posters, postcards, etc. • Electronic and online games. ▶ Project 2: Promotional events. The participation in promotional events should be based on the prioritized markets, and the tourism profiles evaluation, to identify the most appropriate trade events. Travel trade events that could be part of the marketing plan, e.g.: <ul style="list-style-type: none"> • Roadshows, promotional Workshops • Presentations, special topic events • Tourism fairs and meetings • Promotional collaterals and extra material online (postcards, travelers' forums, bloggers' opinions, awards, etc.). <p>For each of these events, BTB should analyze the best strategy to present the entire destination to the concerned public. Promotional event must be used as tool to attract new customers or keep contact with regular ones by educating them on the new tourism possibilities of the destination. The presentation of the destination should be interactive and propose goodies and gifts from Belize to give a sense of the Belizean hospitality.</p> ▶ Project 3: Travel Trade is an effort to improve distribution effectiveness in forms of training programs for selected travel agents. This project requires the evaluation of Belize specialist 	<p>Project 1 to 4: Starting date: 2012 Implementation: Continuous every year</p> <p>Project 1 to 4: Starting date: 2012 Implementation: Continuous every year</p>

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1.3.1 Sub-program for Communication and promotion

agents in source markets and the development of an information model, such as:

- Information platform
- Sales guide (print and electronic version)
- FAM-trips
- Information road-show seminars

By giving easy access to tools and materials to tourism professionals, the destination maximizes the sales opportunities and increases the awareness of the destination.

- **Project 4: Press and Publicity.** Activities should be developed to communicate the tourism offer, the products and the brands to targeted audiences. In the case of Belize, it seems important to focus on the accessibility of information to journalist and also to create advertisements available to the corporate sector. Specific actions can be:

- Press trips
- Media database (gathering information on international travel writers and journalists)
- Resource library including photos, brand imagery, video clips of local attractions, photo CD
- Press clipping
- Media Booklet providing information on general and specific topics (Garifuna, Flora & Fauna, Diving, etc.)
- Newsletter to international travel writers and journalists
- Merchandizing material: prizes for game, shows, competitions, events
- Use of Belizean celebrities as tourism ambassadors

Lead Responsible	Strategic Partners
BTB Regional governments	Belizean celebrities Main touristic attractions of the country BHA, BTIA
Destinations for implementation	
Belize National Territory, Worldwide	
Estimated cost (USD)	Potential financing sources
All program 8.000.000 USD yearly, increasing according to tourism arrivals (see budget considerations below)	Main private tourism companies in the country (e.g Hotel brands) Private booking companies (e.g booking.com) Public budget

1.3.2 Sub-program for Marketing with new technologies

Description and Projects	Time frame
<p>This online marketing program will enhance the visibility of the destination online and keep marketing actions updated towards new technologies use and opportunities. Internet is a strategic tool to attract a large number of customers and to construct the image of the destination. New technologies are developing fast and providing innovative tools for tourism marketing (i.e. enhance reality, role games, holograph, helmet vision, 3D devices, etc.).</p> <p>► Project 1: The Belize Tourism website. It is the destination image on the internet and a commercialization tool. This website has to be dynamic, interactive and efficient for visitors but also useful for tourism stakeholders. The website should be structured by a tourism product menu, gathering all services that support the visitor motivations. Different upgrades and actions must be implemented frequently such as:</p> <ul style="list-style-type: none"> • Update the website periodically to maintain the quality of the information and use the latest technologies • Propose a page with recent news of the tourism industry and of the country on the website • Create a restricted area for professionals and press • The website should be adapted to the different key customer segments (language and design preferences) • The website should be available from all main searching engines optimization (SEO) (Google, Bing, etc) • Visitor reports and statistics should be extracted each month of the website in order to verify the frequency of visits and the visitor characteristics. <p>► Project 2: New technologies and tools development. The web 2.0 is a channel of communication between customers, and new formats and tools will arrive to enhance and improve the experiences. It will be a key factor of success to keep marketing updated on all opportunities coming from innovative technologies. Some of the following tasks and actions could be done, previous assessment of market adequacy:</p> <ul style="list-style-type: none"> • Propose a version of the Belize Tourism Board Website on Smartphone • Create a travel planner on the website with more possibilities (reservations, calendar, comments, pictures) to increase the attraction of the concept and increase direct sales and reservations • Insert interactive maps, video and photos sharing, wikis, widgets in the website • Dedicate a section of the website to comments and forum about the destination (the customer can share his experience and knowledge of the destination) • Create a blog of Belize where professionals and tourists could post news, comments and pictures • Monitor the customer feedback and expectations of the destination by integrating social network such as Facebook, Twitter and Trip advisor • To build capacity skills on new technology tools for marketing on a demand driven basis <p>► Project 3: Customer Relationship Management. This project will identify actions which will be dedicated to further research and target Belize's loyal customers and repeat visitation. This project will provide inputs to the Marketing Intelligence System, and is based on the idea of being a software user (not buying the whole hardware and redundancy systems). It should implement the following actions:</p> <ul style="list-style-type: none"> • Develop a customer relationship management in order to save financial resources and enhance the loyal visitors' profitability rather than constantly targeting new visitors and new target markets. • Manage the CRM via an IT system which would collect and organize the different data collected about loyal customers. 	<p>Project 1: Starting date: 2012 Implementation: Continuous updates and upgrades every year</p> <p>Project 2: Starting date: 2014 Implementation: Continuous updates and upgrades every year</p> <p>Project 3: Starting date: 2016 Implementation: Continuous updates and upgrades every year</p>

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1.3.2 Sub-program for Marketing with new technologies

- Manage the platform to distribute personalized information to customers such as newsletter, special offers to instate a link with them and stimulate repeat business
- Monitor the results of the CRM and improve the process to optimize repeat business.

Lead Responsible

BTB
BHA – BTIA – BCIA – BTOA - BTGA

Strategic Partners

Google, Trip advisor, professional tourism magazines, IT companies; NGOs

Destinations for implementation

Belize National Territory

Estimated cost (USD)

Project 1: update and improve 50.000 USD, annual maintenance 20.000 USD.
Project 2: identification of business model and opportunities of commercial activity 100.000 USD; management of new channels 50.000 USD per year
Project 3: set up of CRM 50.000 USD, maintenance (variable, but based in software use and external servers) 24.000 USD per year.

Potential financing sources

Advertisement from private tourism company (airlines, hotel, etc)
Sponsorship from private and public organization (professional association)
Public budget

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1.3.3 Sub-program for Sales and commercialization

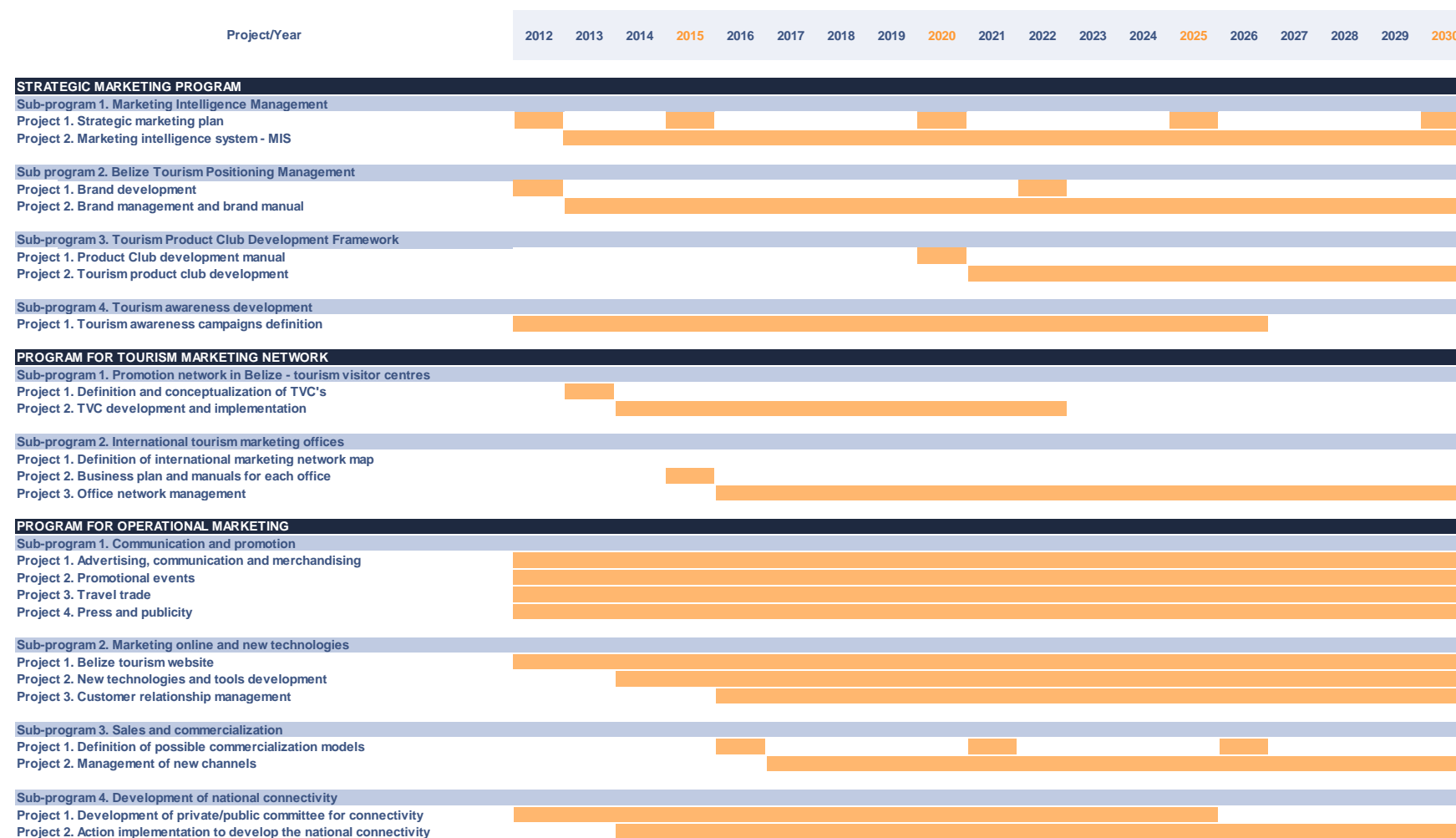
Description and Projects		Time frame
<p>As the technologies are evolving, the sales and commercialization channels are following the same trends. To maximize the sales opportunity, Belize Tourism Board should focus on the right channels to commercialize its product as well as the right ways to sell these products.</p> <p>► Project 1: Definition of possible commercialization models. Belizean tourism authorities should consider different sale and commercialization channels such as:</p> <ul style="list-style-type: none"> • Call center • Online booking facility • Partnering sales initiatives • Commercialization via specialized tour operator (adventure, diving, etc) • Development of products in collaboration with international tour operators (larger commercialization of the destination in Europe for instance) <p>For each of these opportunities, a business plan should be developed:</p> <ul style="list-style-type: none"> • Consider the technical and financial feasibility such as for the call center and online booking which could be difficult to implement with a large number of tourism suppliers which do not have access to modern electronic equipments. • Establish the schedule of the new projects implementation • Define the different strategic partners able to contribute to the different new channels • Define potential financial sources to implement project such as the call center and the online booking facility • Define potential specialized tour operators to introduce niche products such as nature discovery (Orchids, Sub-marine life, etc) • Create new partnerships with international tour operators to position Belize as a major tourism destination • Establish agreements with private companies, government and NGO's to promote the destination by participating to promotional events for instance <p>► Project 2: Management of new channels. The results of the new channel implementation should be monitored annually by BTB</p> <ul style="list-style-type: none"> • Monitoring of the sales and commercialization results • Monitoring of the sale partnership • Monitoring and improvement of the local suppliers to the new booking systems (call center and online booking) • Assessment of results, changes, improvements and decisions to quit or keep the channel. 		<p>Project 1: Starting date: 2016 Implementation: Continuous updates every 5 years</p> <p>Project 2: Starting date: 2017 Implementation: Continuous</p>
Lead Responsible		Strategic Partners
BTB		BHA – BTIA – BCIA – BTOA - BTGA Internet services company
Destinations for implementation		
Belize National Territory		
Estimated cost (USD)		Potential financing sources
Project 1: 200.000 USD Project 2: 500.000 USD per year, lumpsum depending on final channels selected.		Annual fee charged to tourism companies part of the call center and online booking website Commission on sales charged to the customers

1.3.4 Sub-program for Development of national connectivity

Description and Projects	Time frame
<p>There is a need for Belize to develop the national road, air and sea connectivity to increase the circulation of tourists to and within the country. Also, it is important to be clear that land connectivity is much more than roads. This sub-program will address issues of border management, border and entrance reception (training of the Customs & Immigration personnel), policies for ground transportation at a macro level, intra-regional transit agreements, etc. All these will be linked as national policy topic under the Governance Macro-program.</p> <p>▶ Project 1: Development of private/public committee specialized in destination connectivity. This committee will support the development of the national market connectivity and enhance the established connections by conducting regular meetings where they:</p> <ul style="list-style-type: none"> • Define action plans • Identify new partners • Identify issues that impact market growth and product development • Follow-up actions <p>▶ Project 2: Action implementation to develop the national connectivity. The committee should act and lobby or provide financial incentives for:</p> <p><i>Air connectivity:</i></p> <ul style="list-style-type: none"> • International flight development connections; such as direct flights from European Capitals, more flights from other cities of USA. • Interregional flight development and visa facilitation (some regional nationalities need a visa to enter Belize such as Brazilians and Argentineans) • National flight diversification and intensification (frequencies and companies) <p><i>Land connectivity:</i></p> <ul style="list-style-type: none"> • Lobby with corresponding ministries to develop access roads to tourism sites • Bus service network development and quality. <p><i>Sea connectivity:</i></p> <ul style="list-style-type: none"> • New routes development for nautical tourism (National Nautical Route) • Pocket cruise lines attraction: more companies, more frequencies and negotiation of conditions. • Connection with the main interregional cruise hubs; negotiation for taxes, Pro-poor tourism mechanisms and conditions; operational criteria and services, etc. 	<p>Project 1: Starting date: 2012 Duration: 14 years Implementation: Continuous updates</p> <p>Project 2: Starting date: 2013 Implementation: Continuous</p>
Lead Responsible	Strategic Partners
Belizean Ministry of Transportation	BTB and Ministry of Tourism Regional government City hall Private transportation companies (airlines, bus transportation companies, car rental, cruise ship companies) Belize Airport concession company Migration department
Destinations for implementation	
Belize National Territory	
Estimated cost (USD)	Potential financing sources
Project 1: 24.000 USD in expenses per year until 2025 Project 2: variable, but an assumption of 400.000 USD maximum in incentives per year	Government budget Public/private partnership

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1.4 Tourism Marketing Macro Program Implementation Schedule



1.5 Budget of the marketing plan

The marketing budget has been created taking into consideration marketing budget benchmarks in similar destinations, in order to know important ratios that will be acceptable for Belize. Then, the marketing budget is made according to assumptions of operation, and in case of implementing all programs, sub-programs and projects.

Marketing budgets benchmark

The marketing budget benchmarks of the Dominican Republic and the Ecuador are:

	2010 Budget	2009 visitors	Budget/visitors (USD)	Budget/visitors (B\$)
Dominican republic	\$62.000.000	4.000.000	\$15,50	\$31,00
Ecuador	\$11.000.000	813.637	\$13,52	\$27,04
<i>Sources</i>	Tourism minister	UNWTO/Nationwide.com		

This table shows that the budget allocation per visitors of the two countries is between BD\$27 and BD\$31, and seems the same average as the Belizean one: BD\$31.67.

Therefore a potential budget for tourism marketing in Belize should evolve in the same proportion of tourism arrivals to the country from 2010 to 2030, varying from 7.5 million to 21.5 million respectively. On the other hand, the budget could be estimated as a percentage of tourism revenue of Belize (excluding the cruise tourism), where it should represent at least 1 % of the increase of the expenditure span between the years 2011 and 2030. This makes a budget of 18.4 million USD to be implemented every year from 2011 in order to reach the increase goals for the country.

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The final marketing budget for Belize Tourism Marketing Macro Program is:

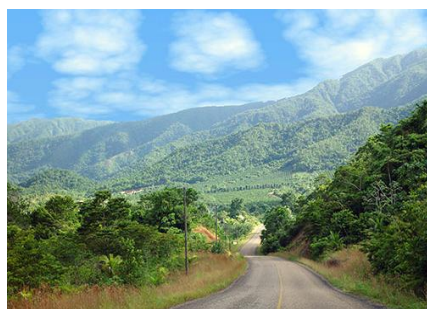
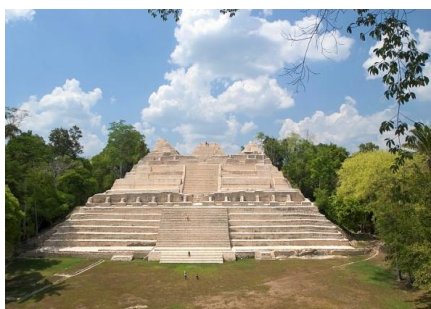
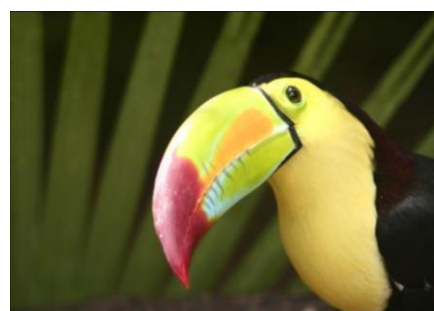
Project/Year	Total compound until 2030	2012	2013	2014	2015	2016	2017	2018	2019	2020
STRATEGIC MARKETING PROGRAM		590.000	585.000	535.000	685.000	535.000	450.000	350.000	350.000	590.000
Sub-program 1. Marketing Intelligence Management	3.500.000	150.000	200.000	150.000	300.000	150.000	150.000	150.000	150.000	300.000
Project 1. Strategic marketing plan	750.000	150.000			150.000					150.000
Project 2. Marketing intelligence system - MIS	2.750.000		200.000	150.000	150.000	150.000	150.000	150.000	150.000	150.000
	-									
Sub-program 2. Belize Tourism Positioning Management	710.000	70.000	15.000	15.000	15.000	15.000	115.000	15.000	15.000	15.000
Project 1. Brand development	140.000	70.000								
Project 2. Brand management and brand manual	570.000		15.000	15.000	15.000	15.000	115.000	15.000	15.000	15.000
	-									
Sub-program 3. Tourism Product Club Development Framework	1.090.000	-	-	-	-	-	-	-	-	90.000
Project 1. Product Club development manual	90.000									90.000
Project 2. Tourism product club development	1.000.000									
	-									
Sub-program 4. Tourism awareness development	3.700.000	370.000	370.000	370.000	370.000	370.000	185.000	185.000	185.000	185.000
Project 1. Tourism awareness campaigns definition	3.700.000	370.000	370.000	370.000	370.000	370.000	185.000	185.000	185.000	185.000
	-									
PROGRAM FOR TOURISM MARKETING NETWORK	17.950.000	-	50.000	100.000	350.000	1.330.000	1.330.000	1.230.000	1.230.000	1.230.000
Sub-program 1. Promotion network in Belize - tourism visitor centres	1.650.000	-	50.000	100.000	250.000	250.000	250.000	150.000	150.000	150.000
Project 1. Definition and conceptualization of TVC's	50.000		50.000							
Project 2. TVC development and implementation	1.600.000			100.000	250.000	250.000	250.000	150.000	150.000	150.000
	-									
Sub-program 2. International tourism marketing offices	16.300.000	-	-	-	100.000	1.080.000	1.080.000	1.080.000	1.080.000	1.080.000
Project 1. Definition of international marketing network map	-				-					
Project 2. Business plan and manuals for each office	100.000				100.000					
Project 3. Office network management	16.200.000					1.080.000	1.080.000	1.080.000	1.080.000	1.080.000
	-									
PROGRAM FOR OPERATIONAL MARKETING	212.732.000	7.574.000	8.044.000	8.544.000	8.494.000	9.744.000	10.018.000	10.018.000	10.018.000	10.018.000
Sub-program 1. Communication and promotion	196.500.000	7.500.000	8.000.000	8.000.000	8.000.000	9.000.000	9.000.000	9.000.000	9.000.000	9.000.000
Project 1. Advertising, communication and merchandising	-									
Project 2. Promotional events	-									
Project 3. Travel trade	-									
Project 4. Press and publicity	-									
	-									
Sub-program 2. Marketing online and new technologies	1.696.000	50.000	20.000	120.000	70.000	120.000	94.000	94.000	94.000	94.000
Project 1. Belize tourism website	410.000	50.000	20.000	20.000	20.000	20.000	20.000	20.000	20.000	20.000
Project 2. New technologies and tools development	900.000			100.000	50.000	50.000	50.000	50.000	50.000	50.000
Project 3. Customer relationship management	386.000					50.000	24.000	24.000	24.000	24.000
	-									
Sub-program 3. Sales and commercialization	7.400.000	-	-	-	-	200.000	500.000	500.000	500.000	500.000
Project 1. Definition of possible commercialization models	400.000					200.000				
Project 2. Management of new channels	7.000.000						500.000	500.000	500.000	500.000
	-									
Sub-program 4. Development of national connectivity	7.136.000	24.000	24.000	424.000	424.000	424.000	424.000	424.000	424.000	424.000
Project 1. Development of private/public committee for connectivity	336.000	24.000	24.000	24.000	24.000	24.000	24.000	24.000	24.000	24.000
Project 2. Action implementation to develop the national connectivity	6.800.000			400.000	400.000	400.000	400.000	400.000	400.000	400.000
	-									
TOTAL BUDGET MARKETING MACRO PROGRAM	230.682.000	8.164.000	8.679.000	9.179.000	9.529.000	11.609.000	11.798.000	11.598.000	11.598.000	11.838.000

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Project/Year	Total compound until 2030	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
STRATEGIC MARKETING PROGRAM		450.000	620.000	450.000	450.000	600.000	450.000	365.000	265.000	265.000	415.000
Sub-program 1. Marketing Intelligence Management	3.500.000	150.000	150.000	150.000	150.000	300.000	150.000	150.000	150.000	150.000	300.000
Project 1. Strategic marketing plan	750.000					150.000					150.000
Project 2. Marketing intelligence system - MIS	2.750.000	150.000	150.000	150.000	150.000	150.000	150.000	150.000	150.000	150.000	150.000
	-										
Sub-program 2. Belize Tourism Positioning Management	710.000	15.000	185.000	15.000	15.000	15.000	15.000	115.000	15.000	15.000	15.000
Project 1. Brand development	140.000		70.000								
Project 2. Brand management and brand manual	570.000	15.000	115.000	15.000	15.000	15.000	15.000	115.000	15.000	15.000	15.000
	-										
Sub-program 3. Tourism Product Club Development Framework	1.090.000	100.000	100.000	100.000	100.000	100.000	100.000	100.000	100.000	100.000	100.000
Project 1. Product Club development manual	90.000										
Project 2. Tourism product club development	1.000.000	100.000	100.000	100.000	100.000	100.000	100.000	100.000	100.000	100.000	100.000
	-										
Sub-program 4. Tourism awareness development	3.700.000	185.000	185.000	185.000	185.000	185.000	185.000	-	-	-	-
Project 1. Tourism awareness campaigns definition	3.700.000	185.000	185.000	185.000	185.000	185.000	185.000				
	-										
PROGRAM FOR TOURISM MARKETING NETWORK	17.950.000	1.230.000	1.230.000	1.080.000	1.080.000	1.080.000	1.080.000	1.080.000	1.080.000	1.080.000	1.080.000
Sub-program 1. Promotion network in Belize - tourism visitor centres	1.650.000	150.000	150.000	-	-	-	-	-	-	-	-
Project 1. Definition and conceptualization of TVC's	50.000										
Project 2. TVC development and implementation	1.600.000	150.000	150.000								
	-										
Sub-program 2. International tourism marketing offices	16.300.000	1.080.000	1.080.000	1.080.000	1.080.000	1.080.000	1.080.000	1.080.000	1.080.000	1.080.000	1.080.000
Project 1. Definition of international marketing network map	-										
Project 2. Business plan and manuals for each office	100.000										
Project 3. Office network management	16.200.000	1.080.000	1.080.000	1.080.000	1.080.000	1.080.000	1.080.000	1.080.000	1.080.000	1.080.000	1.080.000
	-										
PROGRAM FOR OPERATIONAL MARKETING	212.732.000	12.118.000	12.018.000	12.018.000	12.018.000	12.018.000	14.094.000	13.994.000	13.994.000	13.994.000	13.994.000
Sub-program 1. Communication and promotion	196.500.000	11.000.000	11.000.000	11.000.000	11.000.000	11.000.000	13.000.000	13.000.000	13.000.000	13.000.000	13.000.000
Project 1. Advertising, communication and merchandising	-										
Project 2. Promotional events	-										
Project 3. Travel trade	-										
Project 4. Press and publicity	-										
	-										
Sub-program 2. Marketing online and new technologies	1.696.000	94.000	94.000	94.000	94.000	94.000	94.000	94.000	94.000	94.000	94.000
Project 1. Belize tourism website	410.000	20.000	20.000	20.000	20.000	20.000	20.000	20.000	20.000	20.000	20.000
Project 2. New technologies and tools development	900.000	50.000	50.000	50.000	50.000	50.000	50.000	50.000	50.000	50.000	50.000
Project 3. Customer relationship management	386.000	24.000	24.000	24.000	24.000	24.000	24.000	24.000	24.000	24.000	24.000
	-										
Sub-program 3. Sales and commercialization	7.400.000	600.000	500.000	500.000	500.000	500.000	600.000	500.000	500.000	500.000	500.000
Project 1. Definition of possible commercialization models	400.000	100.000					100.000				
Project 2. Management of new channels	7.000.000	500.000	500.000	500.000	500.000	500.000	500.000	500.000	500.000	500.000	500.000
	-										
Sub-program 4. Development of national connectivity	7.136.000	424.000	424.000	424.000	424.000	424.000	400.000	400.000	400.000	400.000	400.000
Project 1. Development of private/public committee for connectivity	336.000	24.000	24.000	24.000	24.000	24.000					
Project 2. Action implementation to develop the national connectivity	6.800.000	400.000	400.000	400.000	400.000	400.000	400.000	400.000	400.000	400.000	400.000
	-										
TOTAL BUDGET MARKETING MACRO PROGRAM	230.682.000	13.798.000	13.868.000	13.548.000	13.548.000	13.698.000	15.624.000	15.439.000	15.339.000	15.339.000	15.489.000

NATIONAL SUSTAINABLE TOURISM MASTERPLAN FOR BELIZE 2030

National Tourism Product Development Macro Program



June 2011

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National Sustainable Tourism Master Plan for Belize 2030 • National Tourism Product Development Macro Program

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1 National Tourism Product Development Macro Program

The Tourism Product and Quality Development macro-program has six programs, one for each of the selected tourism products to develop in Belize.

- ▶ Program for Cultural Tourism Development
- ▶ Program for Nature-based Tourism Development
- ▶ Program for Sun and Beach Tourism Development
- ▶ Program for Cruise Tourism Development
- ▶ Program for Nautical Tourism Development
- ▶ Program for Leisure and Entertainment Tourism Development

The objectives for all programs are:

- ▶ To consolidate the tourism product clusters in terms of:
 - adequate infrastructure support for each tourism product specificities;
 - competitive tourism services and products, keeping the added value for the entire country as a destination;
 - high quality at facilities, services and experiences for the visitors according to each product-segment requirements and expectations;
 - focused commercialization on the product main channels;
 - integral security for visitors and residents;
 - sustainable development to guarantee product attractiveness and benefits in the future;
 - Attain a management framework that sustains product concept development over time

All programs are focused to one specific tourism product of Belize. They all are composed of the same sub/programs, and their overall description is as follow:

1. **Infrastructure & accessibility:** regarding accessibility to the area where the product is operated, the inner support infrastructure to assure the product operation; and in some cases, any very specific infrastructure which constitute part of the product itself (such as adventure trail, Maya trail, etc.).
2. **Business & product development:** the Projects here are oriented to develop destinations or business directly related to the tourism product. They intend to be the core Projects to appeal the visitors.
3. **Capacity building:** while the general tourism plan for Belize deals with broad issues of the building capacity for tourism in the country, these sub-programs are specifically addressed to cover the product cluster needs to operate with minimum quality guarantees.
4. **Marketing & awareness:** though the national wide marketing activities, this program is focused to assure some minimum operational marketing activities in order to reach the target segments of markets. They also include in some cases, the Project of Branding Products, with the main goal of raising quality offerings with clear positioning (i.e. Belize Culture Tourism Brands).
5. **Safety and security:** these sub-programs include integral guidelines for the product development and operations, aiming to complete the first step to enforce them as

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regulations; awareness processes for stakeholders related to each specific product, in order to increase their participation and commitment with quality deliverance of their services; and finally a Project related to rescue and response, focused in the kind of possible problems that a product operation could face.

6. **Sustainability:** as noted in the general program for Belize Tourism, the main basis for sustainability is to settle land use for tourism and in tourism destinations. This principle is also present in this sub-program where every product has its own specificities that have to be considered for product location planning. Also includes the identification, assessment and monitoring of specific safeguards for the products development. Finally, this sub-program have inclusion mechanisms to be developed at every product development in order to alleviate poverty, increase local community benefits and support local tourism related initiatives.
7. **Governance:** in the governance sub-programs and besides the general program Projects, the focused for the product development is on specific regulations for the activity, on investment and fund raising to foster economic initiatives around the products, and on the specific public-private partnerships frameworks required to create some tourism products with their specificities.

Based on their ease, urgency and importance to be developed, Western Belize, South Eastern Coast Belize and Central Coast Belize were previously identified (in the Strategic Report) to be destinations of first development priority. This means that their tourism products will be implemented in the starting phase of Belize's sustainable tourism development. The product development prioritization is based on the identified national tourism product prioritizations and the destinations' own most important and determining tourism product.

The following paragraphs indicate which priority of product development was identified for each tourism destination and provides the reasoning for this.

- ▶ Starting by 2012, **Western Belize** is strengthened to undertake its nature-based and cultural tourism projects. This high priority development is due to the fact that both the destination and the two products were identified to represent a high importance on a national basis.
- ▶ **Central Coast Belize** will first implement projects to improve the current situation of cruise tourism and execute actions to enhance the cruise visitors perception and experience. The early product development of cruise tourism in Central Coast Belize mostly results to be a reactive strategy to the contemporary circumstances in order to prevent the destination's further degradation and to enhance its potential sustainable benefits. Once having started to reorganize the existing cruise tourism, Central Coast Belize's further products such will be developed. By 2022, Leisure and Entertainment Tourism will start by master planning its integral development.
- ▶ **South Eastern Coast Belize** will start with its tourism products that have already been launched and that require specific guidelines and regulations in order to undertake a sustainable path of sun & beach, cruise and nautical tourism development in the destination. However, although cruise tourism is not a priority for the destination, it is regarded to be a challenging issue which needs to be addressed by developing safeguards mechanisms in order to prevent the destination's degradation based on delayed defensive strategies.
- ▶ **Northern Islands** starts planning and developing its nautical tourism product before its sun & beach tourism product. This phasing is based on the identification, that Northern Islands is identified as an active ecotourism and nature-based tourism destination complemented by sun & beach tourism's offer. By 2025, Leisure and Entertainment Tourism will start by master planning its integral development.

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- ▶ **Southern Belize** will start both its soft development for nature-based and cultural tourism development by 2013 which will mostly include research, lobbying activities, capacity building, licensing of tourism suppliers and lobbying activities. By 2015, the hard development will start by conceptualizing, structuring, developing and promoting its product mix. Nautical tourism will be developed prior to sun and beach tourism in order to complete the national system of marina and nautical tourism.
- ▶ **Northern Belize** will concentrate in its first development phase to enhance the impacts generated from cruise tourism by structuring the sites and their infrastructure for larger groups. Simultaneously, Northern Belize will start defining its cultural tourism mix, harnessing Belize's living cultures and rural tourism opportunities. Although, Northern Belize's leisure and entertainment tourism product is identified to be the most economically rentable tourism product, it is scheduled to be start its master planning and developed only by 2018. This later development stage is mainly due to the fact, that leisure and entertainment is regarded to be a product of third priority on the national tourism development agenda and that it will complement the destination's cultural and nature-based tourism offer. However, first legal and juridical regulations and guidelines will be elaborated in a first stage in contemplation of assuring the concepts implementation.
- ▶ **Belize Reef** was identified to remain as long as possible a natural and generally untouched destination, which will mostly develop water-based day visitor attractions and enhance its nautical tourism product. Only at a later stage, Belize Reef will start developing its low density sun & beach tourism product.

The whole NSTMP for Belize will be implemented from 2012 until 2030, in 19 years. The intervention is phased according to two criteria: tourism products' priority for Belize; tourism products' priority for each individual destination; and the phasing for completing the products development on a national level. The combination of these three criteria finally defines the following phased intervention:

Product Development Phasing per Destination

		2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Western Belize	Nature-based																			
	Culture																			
South Eastern Coast	Culture																			
	Sun and Beach																			
	Nature-based																			
	Nautical																			
Central Coast Belize	Cruise																			
	Culture																			
	Nature-based																			
	Cruise																			
Northern Islands	Nautical																			
	Leisure and Entertainment																			
	Nature-based																			
	Culture																			
Southern Belize	Sun and Beach																			
	Nature-based																			
	Nautical																			
	Culture																			
Northern Belize	Nature-based																			
	Cruise																			
	Leisure and Entertainment																			
	Culture																			
Belize Reef	Nature-based																			
	Sun and Beach																			
	Nautical																			

Source: T&L analysis

1.1 Program for Cultural Tourism Development

Product Concept

Culture Tourism is a form of special interest tourism based on the search for participation in new cultural experiences, whether they are aesthetic, intellectual, or emotional.

- ▶ Culture Tourism can be categorized into:
 - **Cultural Heritage / Archeological Tourism:** Considered a sub-segment market or niche specialization of the cultural tourism that satisfies the desire to know and to understand the history of a given destination through its archeology, from prehistoric places to places related to the industrial archeology.
 - Outdoor sites with archaeological deposits
 - Archaeological sites in underground caves and shelters
 - Underwater archaeological sites
 - Museums and/or archaeological collections
 - Dramatization in archaeological sites
 - **Living Cultures experiences:** intangible culture tourism referring to Belize's legacy through local music, gastronomy, traditional events, handicrafts, rural communities and agriculture.

Gaps identified - Diagnostic

- ▶ Rich Maya heritage composed of archeological sites, most of which remain unexcavated.
- ▶ Most Maya temples are difficult and unsafe to be reached which is due to unfavorable road conditions, or undeveloped access roads or paths.
- ▶ Living culture is an asset that should be further developed and expanded throughout the year, rather than only being displayed in very specific days of the year coinciding with cultural festivals and events.
- ▶ Weak cultural asset site management, mainly due to lack of awareness, low knowledge of conservation and preservation techniques and financial resources, resulting in:
 - Negative environmental and social impacts
 - Decrease of destination image and negative tourist experience due to over-crowding of sights by cruise tourism, resulting in a deteriorated destination image
 - Risk of irreversible deterioration of archeological sites
 - Insufficient basic services and infrastructure support services adapted to visit capacity, such as road and accessibility, public toilets, waste management, safety standards and emergency response.
- ▶ Lack of quality services and facilities
- ▶ Weak enforcement of rules and regulations
- ▶ Lack of certified special interest tour guides
- ▶ Lack of social and environmental safeguarding mechanisms when developing cultural tourism sites to prevent deterioration and enhance preservation of the sites.

Vision Cultural Tourism 2030

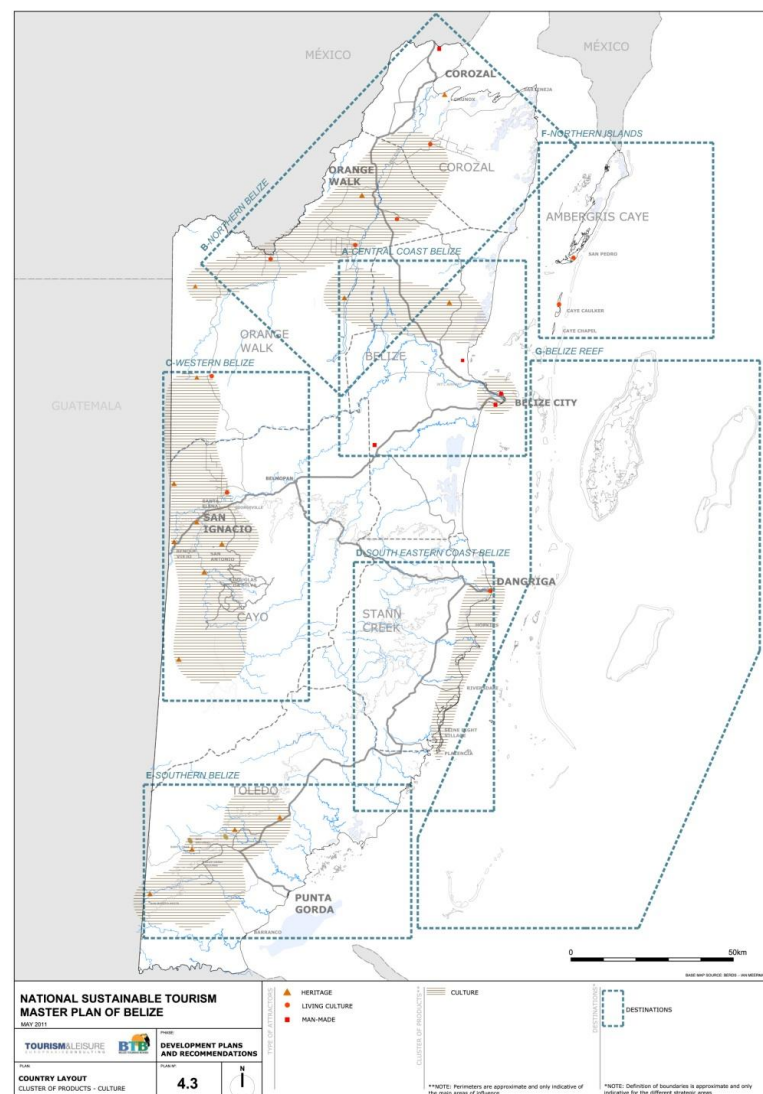
By 2030, Belize's culture tourism will reach consolidation and maintain sustainable growth to become a mature tourism product and will be a main motivator for international tourists to visit

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Belize. Belizean culture richness will be enhanced through archaeological areas such as Caracol and the ATM cave system, urban heritage such as colonial heritage and the development of charming village structures, rural production and living culture such as Garifuna, Mayan and Mennonite traditions. The product will offer the visitor a diverse cultural tourism portfolio with assets and destinations that are easily accessible and structured to cater for tourist visits in terms of infrastructure and support services.

Cultural tourism destinations and product development

As shown in the map below, cultural tourism is especially recommended for development in almost all tourism destinations. Based on the current and potential competitiveness, importance and attractiveness of its cultural assets, cultural tourism in Western Belize, Central Coast Belize and Southern Belize has the potential to become the main tourism product in those areas and hence to act as a main tourist attractor to the destinations. In Northern Islands, Northern Belize and South Eastern Coast Belize cultural tourism will be regarded as secondary tourism product.



Source: T&L

The Cultural Tourism product development will be launched in 2012 with its first integrated destination development master planning in **Western Belize**. This destination's development will include a remodeling of San Ignacio town, and the introduction of man-made facilities (such as

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the National Museum of Anthropology, a Welcome Center and a traditional market) to diversify the local cultural tourism product and make San Ignacio itself a pole of attraction.

The second destination to start its own master planning for cultural tourism development is **Central Coast Belize**. The planning will introduce the Mayan Sites Integral Development at Altun Ha and further focuses on Belize City's cultural tourism development (by creating a charming village concept consisting of the restoration of the existing colonial heritage architecture, revitalization of historic sites, etc.). These modifications will disperse the tourism flows into wider area of the city and destination, and provide enhanced local participation in tourism.

Meanwhile, **Northern Islands** will be developing its cultural tourism portfolio (the charming village concept in San Ignacio, night markets and cultural itineraries and Mayan Sites Integral Development, San Pedro embellishment and façade renovation; improvement of existing hotels and resorts; creation of new cultural festivals, etc.).

By 2015 two destinations will start creating their cultural tourism product, namely **South Eastern Coast Belize** (especially focusing on the development of charming villages especially in Dangriga and Placencia Village, and on the Garifuna living culture and their traditions) and **Northern Belize** (including rural tourism at Mennonite and Mestizo communities and man-made facilities showcasing local productions such as sugar cane and rum).

The last destination to start its cultural development by 2016 will be **Southern Belize**. Its development will require the Mayan Sites Integral Development, cultural trails/themed routes, and diversification of its tourism offer through the enhancement of its living culture and agro-tourism portfolio (creation of further cultural festivals, local markets, agro-tourism activities and man-made facilities including the cacao and coffee plantations).

As described above, the graph below illustrates the product development phases by destination:

		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Western Belize	Culture																				
South Eastern Coast	Culture																				
Central Coast Belize	Culture																				
Northern Islands	Culture																				
Southern Belize	Culture																				
Northern Belize	Culture																				

Description of the program

The **Program for Cultural Tourism Development** structures Belize's cultural tourism products into a system of themed heritage trails spread throughout the country to provide the visitor with diverse experiences of arriving at the destinations. Those destinations will include specific tourism offers, such as Mayan temple sites, restored colonial heritage and a diversity of living culture products including Belize's cultures and ethnic groups. The program suggests the development of integrated Mayan Sites Integral Developments providing the visitors a guaranteed quality experience at archeological sites, with support services in cultural tourism buffer areas including restaurants, accommodations, souvenir stalls, local markets, etc. This program is stipulated to be fully developed by 2027, with just ongoing and maintenance activities and tasks, and it will require an update once finished. Once the portfolio is completed it will require further maintenance and additional development to maintain standards and to diversify its own tourism product.

The Program for Cultural Tourism Development is to develop five projects for the cultural business & product development, namely:

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- ▶ The design, master plan and development of **Belize's National Museum of Anthropology** showcasing Belize's different cultures, ethnic groups, traditional heritage and histories.
- ▶ The concept development for **Mayan Sites Integral Development** which structures, designs, plans and develops Mayan temple sites with similar infrastructure, services and facilities.
- ▶ The concept of **Enchanting Belizean Villages** that restores, embellishes, and revitalizes colonial heritage and historic buildings in order to enhance the qualitative visual impacts and the preservation of architectural heritage.
- ▶ The development of **Rural Tourism Sites & Routes** which develops the rural tourism portfolio by structuring traditional agricultural products as tourism products.
- ▶ The concept development of **Belize Traditional Markets, Festivals and Themed Programs** to develop the living culture portfolio by focusing on mechanisms that foster the participation of local communities and strengthens the inclusion of ethnic groups and minorities.

Lead stakeholders

BTB's Cultural Tourism Product Manager as main organizer and NICH in partnership with local university scholars and anthropologists will together lead and act as main development drivers to assure the products' sustainability by strongly involving stakeholder participation and focusing on the mitigation of potential risks. Special focus should be given to the participation of NGOs and the Ministry of Economic Development to identify inclusion possibilities and mechanisms for ethnic groups and inhabitants of rural areas. MTCAC (strengthened by NSTTF) would be the lead stakeholder in charge of the policies, development of master planning and identification of funding sources.

Objectives

The Belize 2030 objectives of the Cultural Tourism Development Program are:

- ▶ To enhance the visitor's experience at cultural sites by encouraging cultural sites and asset developments
- ▶ To enhance Belize's cultural tourism competitiveness by diversifying the tourism portfolio into different experiences such as cultural heritage, living culture, rural tourism and agro tourism.
- ▶ To further distribute tourism flows by enhancing access to cultural sites by improving and paving 120 miles of access roads/trails in a 30 mile radius and developing signage, road lights, safety conditions and parking at the sites.
- ▶ To harness cultural tourism as a sustainability tool by enhancing local participation in Belize's tourism value chain, heritage conservation and specifically for developing participation programs specially targeting vulnerable and ethnic groups.

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Milestones

Review Years	Milestones
2015	<ul style="list-style-type: none"> ▶ Conceptualization of potential tourism products offered by ethnic communities ▶ Conceptualization, design, compelled funding sources for the development of Mayan Site Integral Development in Northern Islands ▶ Enhanced including enhanced accessibility and support services to most visited cultural sites ▶ Creation of Belize Cultural Tourism Brands ▶ Cultural tourism products are communicated through product specific promotion material ▶ Prioritization of sites and town areas, compelled funding sources to revitalize towns and villages, first embellishments taking place ▶ Conceptualization and identification of market spaces, and implementation of an additional attractive local market ▶ Conceptualized, designed and launched awareness campaign for cultural tourism ▶ Development of training modules, identification of training institutions and capacitating of skilled cultural tourism personnel ▶ Development and lobbying for product specific regulations, norms and laws for cultural tourism
2020	<ul style="list-style-type: none"> ▶ Conceptualization, development and management of the Museum of Anthropology ▶ Completion and functioning of Mayan site integral development in Central Coast Belize ▶ Completion of Enchanting Village project in Belize City and Northern Islands ▶ Conceptualization, development and management of Belize's first agro-tourism sites and routes ▶ Enhanced accessibility to cultural tourism sites and construction of further roads ▶ Elaboration and definition of cultural land use plan including product specific regulations, norms and law developments
2025	<ul style="list-style-type: none"> ▶ Completed and functioning of Belize National Museum of Anthropology ▶ Completion of Enchanting Village project in San Ignacio and in South Eastern Coast Belize
2030	<ul style="list-style-type: none"> ▶ Completion and implementation of Mayan Site Integral Development in Western Belize and Southern Belize ▶ Finalized cultural tourism awareness campaigns.

Sub-programs and projects

1.1.1 Sub-program for Business & Product Development of Cultural Tourism	
Description and Projects	Time frame
<p>The sub-program will promote different facilities to further develop Belize's cultural tourism product, such as a National Museum of Anthropology, different themed routes and a integral development of Mayan Temples. All these developments and many more should be designed and implemented in order to provide the visitor with an enhanced and broad cultural experience in Belize.</p> <ul style="list-style-type: none"> ▶ Project 1: Belize National Museum of Anthropology. Design, master plan and development of a National Museum of Anthropology exhibiting Belize's different cultures, ethnic groups, traditional heritage and their history (e.g. from Buccaneers, Mayas, Garifunas, Mestizos and Mennonites). The museum 	<p>Project 1: Starting date: 2013 Duration: 10 years for development, then continuous maintenance and updating</p>

1.1.1 Sub-program for Business & Product Development of Cultural Tourism

experience should include a museum, souvenirs and shops, restaurant and coffee shops, traditional performances, etc. It might become a reference asset and tourism attraction for the whole country, and might have modern interpretation facilities and equipments.

- *Location:* San Ignacio, at the Old Hospital Building; due to its strategic location at one of Belize's most developed tourism destinations, its market access and its proximity to a large amount of Mayan temples.

- ▶ **Project 2: Mayan Sites Integral Development.** Define homogeneous tourism concept for all Mayan archaeological sites, in order to guarantee a certain quality of tourism experience at those tourism sites. The project then has to develop and implement all those sites according to the concept for tourism. Tasks:

- National Mayan Temple Sites Tourism Concept development: definition of an integrated development concept for all Mayan sites in the country, specifying different categories (i.e. prime/main, complement, etc.), types and particularities (i.e. mountain area, flooding area, island, etc.).
- Mayan Sites Tourism Map and Plan: identification of tourism oriented Mayan sites, assessment and classification; prioritization and selection for development in a phased development plan.
- Mayan site development: design, master planning and development of archeological sites, with business plans and business models for each of them, according to the phased plan. Consider all services for tourism: *E.g.* visitor center, interpretation center, restaurant (food stalls), souvenir shops, toilets, interpretation tools and panels/signage through the site, parking slots, local markets selling traditional handicrafts, arts, local food and products, walking trails in the forests, camping and picnic grounds, etc. Special consideration for capacity building and quality standards for community tourism operations to be developed.
- Secondary Mayan sites, that may only have few excavated temples should find innovative products to attract tourists to the sites by providing experiences that tourists may not acquire from other sites. *E.g. Mayan living museum experiences could present an accurate portrayal of what life was like during the Mayan time period with the use of live acting instead of books or photographs.* Concept development derived should include experiences that would primarily showcase Mayan heritage (ie traditions, way of life) and ultimately generate employment for the local population such as the local Mayan communities.
- Mayan Integral Development locations ranking:
 - First Priority locations: Altun Ha, Lamanai, Caracol, Actun Tunichil Muknal, Cahal Pech
 - Second Priority locations: Chan Chich, El Pilar, Xunantunich, Lubaantun, Nim Li Punit, Uxbenka and Pushilha.

- ▶ **Project 3: Enchanting Belizean Villages.** The project develops Belize's tourism offer by revitalizing colonial heritage villages in Belize in order to attract tourists to experience Belize's traditional life. The objective is to renovate and preserve the existing colonial architecture as a key asset expressing Belizean character. Tasks:

- Concept development for villages interventions
- Enchanting Belizean Villages Plan: definition of villages, prioritization and selection for intervention in a phased plan.
- Renovation of existing and historic buildings, restoration of colonial architecture. Incentive funds for the façade embellishment of hotels and resorts in town centers.
- Renovation of typical rural accommodation (ethno houses in rural villages, farm house stays, stays at fishing villages, etc.) and restaurant facilities
- Development of man-made attractions/facilities such as art galleries, museums, rural markets, etc.
- Capacity building and quality standards for community tourism operations

- ▶ **Project 4: Rural tourism Sites & Routes.** This project develops Belize's rural tourism portfolio by structuring traditional agricultural products as tourism products. Possible subjects could be: the sugar/cane, cacao, milk, citrus, rum

Project 2:

Starting date: 2013
Duration: concept development and plan 1 year, then ongoing implementation according to market demand at least until 2027
Total: 15 years

Project 3:

Starting date: 2014
Duration: concept development, planning and implementation
Total: 17 years

Project 4:

Starting date: 2015
Duration: concept development 1 year, then ongoing until 2021
Total: 7 years

Project 5:

Starting date: 2015
Duration: concept development 1 year, then update every 5 years

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1.1.1 Sub-program for Business & Product Development of Cultural Tourism

<p>production and the Chiclero heritage. They will require:</p> <ul style="list-style-type: none"> • Concept development and routes potential • Stakeholder's involvement (tours operators, travel agencies, tour guides, press, local tourism development units, rural exploitations, etc.) • Capacity building and quality standards for community tourism operations • Business plan, packaging and marketing of routes. <p>► Project 5: Belize Traditional Markets, Festivals and Themed Programs. This project develops local traditional markets and festivals as an expression of living culture of Belize (fish markets, night markets, popular markets and festivals such as the cacao festival, lobster festival, etc.). The temporal cultural attractions require constant innovation and creativity processes in order to target special interest tourists and stimulate return visitors to travel to Belize. They will require:</p> <ul style="list-style-type: none"> • Concept development and tourism potential • Stakeholder's involvement (tour operator, travel agencies, tour guides, press, local tourism development units, rural exploitations, etc.) in order to create the tourism product. • Capacity building and quality standards for community tourism operations • Business plan (if needed), packaging and marketing of markets and festivals. 	
Lead Responsible	Strategic Partners
BTB (product development)	NSTTF, BTIA, National Garifuna Council, Mennonite communities, Communities of Shipstern Nature Reserve NICH, Ministry of Tourism, Toledo Maya Cultural Council Beltraide, Ministry of Economic Development
Destinations for implementation	
Western Belize, Central Coast Belize, Southern Eastern Coast Belize, Northern Belize, Southern Belize, Northern Islands	
Estimated cost (USD)	Potential financing sources
USD 81,550,000	BTB, Private tourism sector, NICH, City Council, Municipality, Multilateral donors

1.1.2 Sub-program for Infrastructure and Accessibility of Cultural Tourism

Description and Projects	Time frame
<p>The sub-program for the development of infrastructure and support services of Cultural Tourism destinations will include different improved and enhanced quality of access possibilities for individual travelers and for large groups arriving to Belize's cultural tourism sites.</p> <p>► Project 1. Road and trail accessibility. The project enhances the road infrastructure by improving the quality and the road pavement in order to better access from general national routes and roads to cultural tourism sites/towns/villages. Tasks:</p> <ul style="list-style-type: none"> • Prioritization of accesses to develop from main national roads and villages to main cultural sites. At least, high priority should be given to: <ul style="list-style-type: none"> i. From the Western Highway to Caracol ii. From Southern Highway to Lubaantun, Uxbenka and Pushilha iii. From Sand Hill to Altun Ha • Install signage and road lights where required in order to enable an easy and safe arrival/departure from and to the cultural tourism destinations <p>► Project 2. Basic services consolidation. Assessment and development of the required needs for each cultural tourism site in order to provide sufficient service supply (waste collection and management, energy, water, etc.) for the correct operation of cultural tourism in destinations, routes and sites, according to the</p>	<p>Project 1: Starting date: 2012 Duration: continuous</p> <p>Project 2: Starting date: 2013 Duration: continuous</p> <p>Project 3: Starting date: 2015 Duration: continuous</p>

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1.1.2 Sub-program for Infrastructure and Accessibility of Cultural Tourism

type and level of use at each site.	
<p>► Project 3. Mayan Heritage Trail. Recover and develop Mayan heritage trails (<i>sacbes</i>) for tourism (part of them, or total recovery between Maya Sites). These trails will be part of adventure and culture tourism offering, putting in value the assets as a whole experience of Mayan culture and local nature, through walking tours and itineraries. Tasks:</p> <ul style="list-style-type: none"> • Identification and selection of trails (according to archeological value and tourism potential). • Master planning of paths and basic/tourism related infrastructure development (signage along the trail, accommodation and food & beverage facilities in strategic sites, visitor information center in starting-ending points, first-aid/medical center, etc). • Continuous project: maintaining trails and opening new <i>sacbes</i> to enhance the Mayan Heritage Trail system 	
Lead Responsible	Strategic Partners
BTB (product development) National Institute for Culture and History	NSTTF Ministry of Works Ministry of Tourism
Destinations for implementation	
Western Belize, Central Coast Belize, Southern Eastern Coast Belize, Northern Belize, Southern Belize, Northern Islands	
Estimated cost (USD)	Potential financing sources
USD 102,750,000	NSTTF Ministry of Works Ministry of Rural Development Ministry of Economic Development Municipalities and Town Councils NICH – Ministry of Tourism

1.1.3 Sub-program for Marketing and Awareness of Cultural Tourism

Description and Projects	Time frame
<p>The sub-program of the operational marketing development for Cultural Tourism includes the development of a Belize Cultural Tourism brand and its declinations targeting different market-segments. This brand must be coordinated with the Belize National Tourism Brand. The sub-program includes marketing, promotion and communication possibilities dedicated for enhanced sales of Belize's cultural tourism products and mechanisms to increase the awareness of cultural tourism.</p> <p>► Project 1. Belize Cultural Tourism Brands. Development of Belize Cultural Tourism umbrella brand in accordance with BTB's strategy and using declinations to commercial group typologies in order to target specific segments e.g. luxury, communitarian, lifecycle, special interest, etc. It will require developing a commercial brand for Belize culture tourism products.</p> <p>► Project 2. Cultural Tourism product club. Establishment of the Cultural tourism clubs to structure the product for different market segments. E.g. cultural heritage, living cultures, festivals, themed routes, rural tourism, colonial heritage, etc.</p> <p>► Project 3. Promotion, communication & PR. Development of marketing collaterals (such as sales brochures and other printed product information including sales presentations, web content). The marketing activities for Cultural Tourism will be coordinated with the Belize National Marketing activities. Tasks:</p> <ul style="list-style-type: none"> • Development of a specific Cultural Tourism web-page on BTB's web-site • Development of marketing collaterals (such as sales brochures and other 	<p>Project 1: Starting date: 2013 Implementation: 1 year</p> <p>Project 2: Starting date: 2021 Duration: continuous</p> <p>Project 3: Starting date: 2013 Duration: continuous</p> <p>Project 4: Starting date: 2013 Duration: continuous</p>

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1.1.3 Sub-program for Marketing and Awareness of Cultural Tourism

<p>printed product information including brochures introducing the cultural tourism and its rural and agro tourism products; the surrounding tourism offer, etc.)</p> <ul style="list-style-type: none"> • Development of an annual marketing plan including FAM trips, media usage, publishing, direct marketing and others for the targeted markets and segments. • Development of marketing kits and promotional items and give-aways. • Participation in cultural tourism fairs • Advertising in magazines • Advertising on specialized websites: <ul style="list-style-type: none"> i. USA: www.thecompassculture.com, www.bravenewtraveller.co, ii. Europe: www.abenteuer-reisen.de, www.reisen.de (GER); www.wanderlust.co.uk (UK) <p>► Project 4. Product specific awareness development. Development of awareness programs and campaigns for stakeholders considering specific risks related to the development of Cultural Tourism.</p> <ul style="list-style-type: none"> • Development of awareness to educate stakeholders on feasible practices to mitigate cultural tourism sites/attractions/paths degradation and enhance the preservation of cultural tourism sites • Development of awareness campaigns for citizens on the importance and significance of the development of Cultural Tourism, including possible activities for participation and benefiting from the economic activities. E.g.: E.g. Awareness lessons at school; at communities of wider cultural asset buffer area (diffusion material: leaflets, brochures, street performances, etc.) 	
Lead Responsible	Strategic Partners
BTB (marketing department)	BTB (product development), BTIA, NICH, Municipalities
Destinations for implementation	
Western Belize, Central Coast Belize, Southern Eastern Coast Belize, Northern Belize, Southern Belize, Northern Islands	
Estimated cost (USD)	Potential financing sources
USD 23,050,000	BTB, Municipalities, Multilateral donors

1.1.4 Sub-program for Standards and Safety & Security Assurance of Cultural Tourism

Description and Projects	Time frame
<p>The sub-program for the safety and security development of Cultural Tourism focuses on operational guidelines to prevent incidents and the development of negative impacts of cultural tourism. It consists of developing strategies, laws, law enforcement and preventive/reactive mechanisms to enhance visitors' safety, security and their experience.</p> <p>► Project 1. Operational guidelines for cultural tourism. This project will structure the cultural tourism product into an integrated system of operational safety and security standards and guidelines which should become legal articles in specific tourism acts.</p> <ul style="list-style-type: none"> • Development of Codes of Conduct for visitors, tourists, employees and residents, providing guidelines, law excerpts and fines imposed for misconduct at sensitive areas such as Mayan temple pilferage • Development of maintenance plans and schedules to keep cleanliness and safety in order to enhance its preservation • Cultural tourism heritage sites tour guide regulations <p>► Project 2. Safety & security for cultural tourism. Development of specific emergency management plans to reduce the potential harm/damage caused by crises occurring in cultural tourism destinations.</p> <ul style="list-style-type: none"> • Police stations in the area and services offered by the Tourism Police Unit to 	<p>Project 1: Starting date: 2013 Implementation: 2 years Revision: 2021 for 2 years</p> <p>Project 2: Starting date: 2015 Duration: continuous</p> <p>Project 3: Starting date: 2022</p>

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1.1.4 Sub-program for Standards and Safety & Security Assurance of Cultural Tourism

assist tourists requiring help and assistance. Especially in large tourism hubs, a specialist tourist police force should be introduced to secure an enhanced tourist experience and maintain a positive destination image: free of harassment, petty thieves and crime.		Duration: continuous
<ul style="list-style-type: none">• Development of tourism-specific laws and strong law enforcement associated with burglaries, petty-thieves, armed attacks, drug dealing and scamming.• Development of mechanisms to prevent community conflicts resulting from culture/ethnic/religious offenses, social harassment, etc.• Development of specific risk management plans for cultural tourism destinations and operators, including incidents resulting from mass panic, armed burglaries, etc.• Development of facilities providing first aid and health assistance in the vicinity of cultural tourism destinations• Development of a search and rescue mechanism and task team force prepared to respond to product specific emergency rescue missions, such as search for lost visitors.		
▶ Project 3. Integrated Quality Management system. Development of best practice guidelines for cultural tourism operators for a voluntary adhesion to the national IQM system.		
Lead Responsible		Strategic Partners
BTB (product development) Ministry of Tourism		Tourism Police Unit BTIA Belize Tour Guide Association
Destinations for implementation		
Western Belize, Central Coast Belize, Southern Eastern Coast Belize, Northern Belize, Southern Belize, Northern Islands		
Estimated cost (USD)		Potential financing sources
USD 3,360,000		BTB - Licensing fees Multilateral funds

1.1.5 Sub-program for Capacity Building of Cultural Tourism

Description and Projects	Time frame
<p>The sub-program for the development capacity building modules and trainings for stakeholders involved in cultural tourism activities (or tourism related activities) and provides tour guide seminars especially for ethnic groups and national tour guides to learn from the different cultures, their history and Belizean traditions. The sub-program thus develops skilled personnel with an enhanced knowledge of culture and history.</p> <p>► Project 1: Continuous training. This project develops special modules to enhance tourism service provider's ability to cater to cultural tourists' needs and experiences in Belize up to international standards.</p> <ul style="list-style-type: none"> • Development of modules for culture tour guide training • Development of modules for enhanced conservation and preservation techniques of cultural sites • Development of training modules to enhance the capacities of cultural site managers (e.g. data gathering and analysis, general site management plans, carrying capacity studies, site monitoring plans, interpretive plans, conservation plans and operating plans) • Development of professionalization and capacity skills development of community tourism organizations. 	<p>Project 1: Starting date: 2015 Duration: continuous</p>
Lead Responsible	Strategic Partners
BTB (product development)	BTB (quality development) Beltraide – Ministry of Economic Development BTIA

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1.1.5 Sub-program for Capacity Building of Cultural Tourism

	BHA National training institutions (universities, vocational training centers, etc.) Toledo Maya Cultural Council
Destinations for implementation	
Western Belize, Central Coast Belize, South Eastern Coast Belize, Northern Belize, Southern Belize, Northern Islands	
Estimated cost (USD)	Potential financing sources
USD 2,400,000	BTIA Private sector Student Fees

1.1.6 Sub-program for Sustainability of Cultural Tourism

Description and Projects	Time frame
<p>The sub-program for the long-term sustainability of Cultural Tourism developments designs mechanisms to assure that the social safe guards and the land/ecosystem's protection, conservation and economic development requirements are met.</p> <ul style="list-style-type: none"> ▶ Project 1. Cultural tourism land use plan. The plan will structure Belize's cultural tourism destinations as a product, mapping each destination with: <ul style="list-style-type: none"> • Identification of specific cultural tourism sites for the development of Belize's Cultural Tourism product • The prioritization of sites and investment plan • Environmental and social safeguards to consider for tourism in each site • And the development of a site land use framework including land use definition including safeguards and a database for scientific data collection and improved monitoring. ▶ Project 2. Cultural tourism asset management and conservation. This project defines cultural tourism safeguards that should be considered when developing sites. <ul style="list-style-type: none"> • Hence, it requires the identification and assessment of the vulnerability of cultural tourism resources. • The development of indicators, responsibilities and roles for monitoring, reporting and communication processes to create a set of offensive and defensive strategies, which will help to maintain sustainable and structured development of the tourism product. • And an annual monitoring and evaluation system of the impacts caused by cultural tourism ▶ Project 3. Cultural tourism inclusion mechanisms. Identification and activation of mechanisms adapted for the Belize destination's reality to reduce poverty through Cultural Tourism, to involve communities and to support their economic initiatives providing employment opportunities to citizens, micro-enterprise and opportunities to become suppliers to the cultural tourism industry. 	<p>Project 1: Starting date: 2014 Implementation: 2 years</p> <p>Project 2: Starting date: 2015 Duration: continuous</p> <p>Project 3: Starting date: 2014 Duration: continuous</p>
Lead Responsible	Strategic Partners
BTB (product development)	PACT NICH Municipalities NGO's Universities and scholars
Destinations for implementation	
Western Belize, Central Coast Belize, Southern Eastern Coast Belize, Northern Belize, Southern Belize, Northern Islands	

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1.1.6 Sub-program for Sustainability of Cultural Tourism

Estimated cost (USD)	Potential financing sources
USD 4,950,000	PACT Local NGOs NSTTF Multilateral donors

1.1.7 Sub-program for Governance of Cultural Tourism

Description and Projects	Time frame
<p>The sub-program is focused on legislation development/amendments related to cultural tourism. It will work on existing or new legislative regulations and regulatory frameworks that govern the safety and sustainability of Belize's cultural resources impacted by tourism.</p> <p>► Project 1. Regulations, norms and law development for cultural tourism. This project develops regulations on value chain components for the enhancement and improvement of Cultural Tourism and the area in which these take place. Hence the act could include regulatory articles on areas such as:</p> <ul style="list-style-type: none"> • Development of regulations, laws and enforcing to ensure the safety conditions of cultural tourism assets. • Development of tourism-specific laws and strong law enforcement associated with burglaries, petty-thieves, armed attacks, drug dealing and scamming on cultural sites. • Development of site management plans including a calculation of the maximum day visit capacities and strong law enforcement if these numbers are being exceeded. 	<p>Project 1: Starting date: 2013 Implementation: 1 year</p>
Lead Responsible	Strategic Partners
BTB (product development)	Ministry of Tourism PACT NGOs Local Municipalities Ministry of Police and Public Safety BTIA Universities and scholars
Destinations for implementation	
Western Belize, Central Coast Belize, Southern Eastern Coast Belize, Northern Belize, Southern Belize, Northern Islands	
Estimated cost (USD)	Potential financing sources
USD 250,000	Ministry of Tourism Local Municipalities Ministry of Police and Public Safety

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1.1.8 Cultural Tourism Development Implementation Schedule

Project/Year	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Program for Cultural Tourism Development																			
Sub-program for Business & Product Development of Cultural Tourism																			
Project 1: Belize National Museum of Anthropology (planning and building)																			
Project 2: Mayan Site Integral Development (planning and building)																			
Project 3: Enchanting Belizean Villages																			
Project 4: Rural tourism Sites & Routes																			
Project 5: Belize Traditional Markets & Festivals																			
Sub-program for Infrastructure and Accessibility of Cultural Tourism																			
Project 1: Road and trail accessibility																			
Project 2: Support services consolidation																			
Project 3: Heritage Trail System																			
Sub-program for Marketing and Awareness of Cultural Tourism																			
Project 1: Belize Cultural Tourism Brands																			
Project 2: Cultural Tourism product club																			
Project 3: Promotion, communication & PR																			
Project 4: Product specific awareness development																			
Sub-program for Standards and Safety & Security Assurance of Cultural Tourism																			
Project 1: Operational guidelines for cultural tourism																			
Project 2: Safety & security for cultural tourism																			
Project 3: Integrated Quality Management system																			
Sub-program for Capacity Building of Cultural Tourism																			
Project 1: Continuous training																			
Sub-program for Sustainability of Cultural Tourism																			
Project 1: Cultural tourism land use plan																			
Project 2: Cultural tourism asset management and conservation																			
Project 3: Cultural tourism inclusion mechanisms																			
Sub-program for Governance of Cultural Tourism																			
Project 1: Regulations, norms and law development for cultural tourism																			

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1.1.9 Cultural Tourism Development Cost Model

Project/Year	Total (US\$)	2012	2013	2014	2015	2016	2017	2018	2019	2020
Program for Cultural Tourism Development	218.310.000	2.250.000	5.850.000	8.850.000	18.300.000	20.330.000	17.630.000	14.830.000	14.830.000	15.780.000
Sub-program for Business & Product Development of Cultural Tourism	81.550.000	1.250.000	2.800.000	3.300.000	8.000.000	9.300.000	7.800.000	5.000.000	6.300.000	7.250.000
Project 1: Belize National Museum of Anthropology (planning and building)	11.650.000	750.000	2.000.000	2.000.000	2.500.000	2.500.000	1.000.000	300.000	300.000	300.000
Project 2: Mayan Site Integral Development (planning and building)	19.600.000	500.000	800.000	800.000	3.000.000	3.000.000	3.000.000	1.000.000	1.000.000	1.000.000
Project 3: Enchanting Belizean Villages	38.000.000			500.000	2.000.000	2.500.000	3.000.000	2.000.000	3.000.000	3.450.000
Project 4: Rural tourism Sites & Routes	9.300.000				500.000	800.000	800.000	1.200.000	2.000.000	2.000.000
Project 5: Belize Traditional Markets, Festivals and Themes	3.000.000					500.000		500.000		500.000
Sub-program for Infrastructure and Accessibility of Cultural Tourism	102.750.000	1.000.000	1.650.000	3.500.000	7.600.000	9.400.000	8.200.000	8.200.000	7.000.000	7.000.000
Project 1: Road and trail accessibility	81.500.000	1.000.000	1.500.000	3.000.000	5.000.000	7.000.000	6.000.000	6.000.000	6.000.000	6.000.000
Project 2: Support services consolidation	18.250.000		150.000	500.000	2.000.000	2.000.000	2.000.000	2.000.000	800.000	800.000
Project 3: Maya Heritage Trail System	3.000.000				600.000	400.000	200.000	200.000	200.000	200.000
Sub-program for Marketing and Awareness of Cultural Tourism	23.050.000	-	1.050.000	1.000.000	1.000.000	1.000.000	1.000.000	1.000.000	1.000.000	1.000.000
Project 1: Belize Cultural Tourism Brands	50.000		50.000							
Project 2: Cultural Tourism product club	5.000.000									
Project 3: Promotion, communication & PR	18.000.000		1.000.000	1.000.000	1.000.000	1.000.000	1.000.000	1.000.000	1.000.000	1.000.000
Project 4: Product specific awareness development	1.440.000		80.000	80.000	80.000	80.000	80.000	80.000	80.000	80.000
Sub-program for Standards and Safety & Security Assurance of Cultural Tourism	3.360.000	-	100.000	50.000	300.000	300.000	300.000	300.000	200.000	200.000
Project 1: Operational guidelines for cultural tourism	300.000		100.000	50.000						
Project 2: Safety & security for cultural tourism	2.700.000				300.000	300.000	300.000	300.000	200.000	200.000
Project 3: Integrated Quality Management system	360.000									
Sub-program for Capacity Building of Cultural Tourism	2.400.000	-	-	-	150.000	150.000	150.000	150.000	150.000	150.000
Project 1: Continuous training	2.400.000				150.000	150.000	150.000	150.000	150.000	150.000
Sub-program for Sustainability of Cultural Tourism	4.950.000	-	-	1.000.000	1.250.000	180.000	180.000	180.000	180.000	180.000
Project 1: Cultural tourism land use plan	1.800.000			900.000	900.000					
Project 2: Cultural tourism asset management and conservation	1.450.000				250.000	80.000	80.000	80.000	80.000	80.000
Project 3: Cultural tourism inclusion mechanisms	1.700.000			100.000	100.000	100.000	100.000	100.000	100.000	100.000
Sub-program for Governance of Cultural Tourism	250.000	-	250.000	-	-	-	-	-	-	-
Project 1: Regulations, norms and law development for cultural tourism	250.000		250.000							
TOTAL BUDGET CULTURAL TOURISM MACRO PROGRAM	218.310.000,00	2.250.000	5.850.000	8.850.000	18.300.000	20.330.000	17.630.000	14.830.000	14.830.000	15.780.000

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Project/Year	Total (US\$)	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Program for Cultural Tourism Development	218.310.000	14.830.000	12.220.000	11.070.000	9.570.000	9.570.000	10.070.000	9.070.000	8.570.000	7.570.000	7.120.000
Sub-program for Business & Product Development of Cultural Tourism	81.550.000	7.700.000	5.200.000	4.200.000	2.700.000	2.700.000	3.200.000	2.200.000	1.700.000	700.000	250.000
Project 1: Belize National Museum of Anthropology (planning and building)	11.650.000										
Project 2: Mayan Site Integral Development (planning and building)	19.600.000	1.000.000	1.000.000	500.000	500.000	1.000.000	1.000.000	500.000			
Project 3: Enchanting Belizean Villages	38.000.000	4.700.000	3.700.000	3.700.000	1.700.000	1.700.000	1.700.000	1.700.000	1.700.000	700.000	250.000
Project 4: Rural tourism Sites & Routes	9.300.000	2.000.000									
Project 5: Belize Traditional Markets, Festivals and Themes	3.000.000		500.000		500.000		500.000				
Sub-program for Infrastructure and Accessibility of Cultural Tourism	102.750.000	5.000.000	5.000.000	4.900.000	4.900.000	4.900.000	4.900.000	4.900.000	4.900.000	4.900.000	4.900.000
Project 1: Road and trail accessibility	81.500.000	4.000.000	4.000.000	4.000.000	4.000.000	4.000.000	4.000.000	4.000.000	4.000.000	4.000.000	4.000.000
Project 2: Support services consolidation	18.250.000	800.000	800.000	800.000	800.000	800.000	800.000	800.000	800.000	800.000	800.000
Project 3: Maya Heritage Trail System	3.000.000	200.000	200.000	100.000	100.000	100.000	100.000	100.000	100.000	100.000	100.000
Sub-program for Marketing and Awareness of Cultural Tourism	23.050.000	1.500.000	1.500.000	1.500.000	1.500.000	1.500.000	1.500.000	1.500.000	1.500.000	1.500.000	1.500.000
Project 1: Belize Cultural Tourism Brands	50.000										
Project 2: Cultural Tourism product club	5.000.000	500.000	500.000	500.000	500.000	500.000	500.000	500.000	500.000	500.000	500.000
Project 3: Promotion, communication & PR	18.000.000	1.000.000	1.000.000	1.000.000	1.000.000	1.000.000	1.000.000	1.000.000	1.000.000	1.000.000	1.000.000
Project 4: Product specific awareness development	1.440.000	80.000	80.000	80.000	80.000	80.000	80.000	80.000	80.000	80.000	80.000
Sub-program for Standards and Safety & Security Assurance of Cultural Tourism	3.360.000	300.000	190.000	140.000	140.000	140.000	140.000	140.000	140.000	140.000	140.000
Project 1: Operational guidelines for cultural tourism	300.000	100.000	50.000								
Project 2: Safety & security for cultural tourism	2.700.000	200.000	100.000	100.000	100.000	100.000	100.000	100.000	100.000	100.000	100.000
Project 3: Integrated Quality Management system	360.000		40.000	40.000	40.000	40.000	40.000	40.000	40.000	40.000	40.000
Sub-program for Capacity Building of Cultural Tourism	2.400.000	150.000	150.000	150.000	150.000	150.000	150.000	150.000	150.000	150.000	150.000
Project 1: Continuous training	2.400.000	150.000	150.000	150.000	150.000	150.000	150.000	150.000	150.000	150.000	150.000
Sub-program for Sustainability of Cultural Tourism	4.950.000	180.000	180.000	180.000	180.000	180.000	180.000	180.000	180.000	180.000	180.000
Project 1: Cultural tourism land use plan	1.800.000										
Project 2: Cultural tourism asset management and conservation	1.450.000	80.000	80.000	80.000	80.000	80.000	80.000	80.000	80.000	80.000	80.000
Project 3: Cultural tourism inclusion mechanisms	1.700.000	100.000	100.000	100.000	100.000	100.000	100.000	100.000	100.000	100.000	100.000
Sub-program for Governance of Cultural Tourism	250.000	-	-	-	-	-	-	-	-	-	-
Project 1: Regulations, norms and law development for cultural tourism	250.000										
TOTAL BUDGET CULTURAL TOURISM MACRO PROGRAM	218.310.000,00	14.830.000	12.220.000	11.070.000	9.570.000	9.570.000	10.070.000	9.070.000	8.570.000	7.570.000	7.120.000

1.2 Program for Nature-based Tourism Development

Product Concept

Nature-based Tourism is any form of tourism that relies primarily on the natural environment for its attractions or settings, hence including eco-tourism and adventure tourism. Although the form of execution of nature-based tourism can be utterly distinctive in each case, the most common element is the usage and consumption of the same resources/assets. Therefore the overall development of nature-based tourism has to be coordinated, which is the reason for classifying all elements involved as one tourism product.

- ▶ The concept of Belize's nature-based tourism can be categorized into:
 - **Nature recreation:** Trips taken with the primary motivation of engaging in recreational or educational activities in a natural environment and that does not require physical exertion or specialized skills.
 - **Ecotourism:** Soft activities undertaken sustainably and responsively in harmony with nature and society. Activities mostly include natural areas, conserving their environments and improve the benefits to them generated through tourism.
 - **Adventure tourism:** Trips undertaken by tourists seeking to engage in activities that are typically (but not necessarily) oriented to physical exertion. Adventure tourism tends to take place in remote or relatively unexplored areas. It can be further defined as 'hard' and 'soft' adventure. A 'hard' adventure may involve a certain level of risk and require some skill (e.g. diving, white-water rafting) while a 'soft' adventure is less active (e.g. bird-watching, cycling).
- ▶ Activities can be classified as:
 - **Land-based:** This type of sub-concept refers to the different nature and adventure activities that are offered within a natural environment on land. Activities such as: bird watching, canopying, visits to national parks/reserves to enjoy the local flora and fauna.
 - **Water-based:** This type of sub-concept refers to the different nature and adventure activities that are offered within a natural environment on or under the water surface. Activities could be: canoeing, river tours, diving, snorkeling, rafting, kayak, kite-surf.

Gaps identified – Diagnostic

- ▶ Diverse and abundant selection of marine life with 70 types of hard corals and nearly 500 species of fish living in a world-class reef/caye/atoll system that extends the length of the 185-mile country's coastline.
- ▶ Nature Parks and Reserves require further investment for product development to structure them as tourist attractions offering nature trails, wildlife sightseeing, and facilities.
- ▶ Except for certain specific cases, accessibility is a clear issue that needs to be resolved to facilitate access to the broad network of nature parks and reserves in Belize. Presently, accessibility to these areas involves long unpaved roads and even today some key areas still remain inaccessible.
- ▶ The Belizean tourism product supply is still narrow when it comes to offering nature based activities, particularly inland, and those currently offered concentrate on a very few marine and inland sites, which thus suffer higher environmental risks.
- ▶ The environmental impact of the tourism activity is clearly an issue in marine and land nature reserves. There is a high risk of severe deterioration of the biodiversity, particularly in marine areas, which are up until now the most visited.

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- ▶ Belize has an extraordinary pristine natural environment as the base for developing adventure tourism activities for experienced and non-experienced visitors.
- ▶ Adventure guiding licenses are generally focused (except for caving, whale shark, and diving) and therefore further specific licenses for technical activities should be given in areas such as mountaineering, kayaking, rock climbing, canyoning, etc. Focused training for such specific activities should also be provided.
- ▶ Adventure activities are currently taking place without sufficient safety conditions (i.e. no regular use of helmets, lack of security systems, medical or first aid services not available on site, etc.)

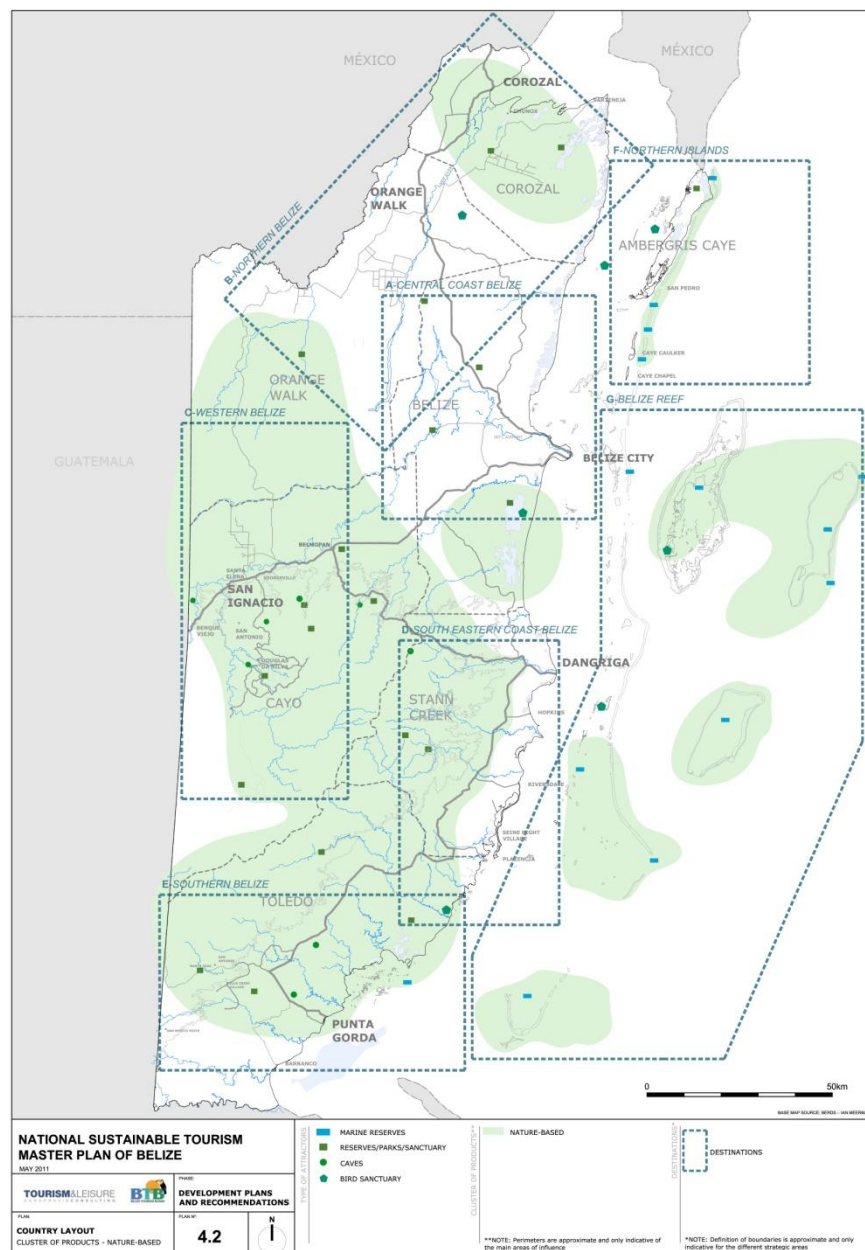
Vision Nature-based Tourism 2030

Nature-based tourism is currently one of the most developed and fastest growing tourism products in Belize. By 2030, its sustainable growth will reach consolidation and maintain sustainable development to become a mature tourism product and be a leading motivator for international tourists to visit Belize. Belizean natural diversity will be enhanced through the development of man-made activity centers, ecotourism & adventure tourism roads and themed routes. Furthermore, new destinations will undergo integrated development with specific facilities, infrastructures, services that will be structured into the overall sustainable national approach of the NSTMP. The product will offer visitors a diverse nature-based tourism portfolio including activities and facilities for both relaxation and adventure which will be easily accessible and structure to cater to international tourist expectations.

Nature-based tourism destinations and product development

As can be identified from the map below, Nature-based Tourism is a tourism product that will be accommodated in almost all areas of Belize and within specific protected natural areas. Based on the current and potential competitiveness, importance and attractiveness of its nature assets, the nature-based tourism in Western Belize, Belize Reef, Northern Islands and Southern Belize has the potential to become the main tourism product and hence to act as a main tourist attractor for those destinations. In Northern Belize, South Eastern Coast Belize and Central Coast Belize, nature-based tourism will be regarded as secondary tourism product.

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Source: T&L

The Nature-based Tourism product development will launch its first integrated destination development master planning in **Western Belize**. During the first year of Western Belize's nature-based tourism development, the master planning for the sights will include the development of the caving and nature trail systems and ecotourism & adventure routes. Furthermore, Western Belize will develop an Ecotourism & Adventure tourism visitor center in San Ignacio and develop its integral ecotourism sites to structure them into Belize's main adventure tourism destination.

The second destination to develop its nature-based tourism product is **Northern Islands** which consists of the enhanced development of activity based man-made facilities, and further development of Bacalar Chico National Park. However, most of Northern Islands' nature-based tourism activities are recommended to be structured around the diving and snorkeling theme and the natural heritage of Bacalar Chico National Park. Furthermore, San Pedro will offer a diving and living reef welcome and exhibition center in the bridge area.

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After this, **South Eastern Coast Belize** will be the third destination to strengthen its nature-based tourism product. This will mostly include development of activity based man-made facilities and the development of tourism projects in natural areas (i.e. Cockscomb Basin Wildlife Sanctuary and St. Herman's Cave and National Park).

The development master plan for nature-based tourism in **Southern Belize** will design and develop the local ecotourism & adventure routes and natural trails through the nature reserves and caves, and develop man-made facilities hosting adventure experiences in Belize's southern areas. As Southern Belize is currently one of the less developed destinations, an integral develop of its Ecotourism and Adventure tourism sites is recommended in order to structure them for "extreme" adventure activities.

Central Coast Belize and **Belize Reef** will be the last destinations to develop their nature-based tourism product. Central Coast Belize's nature-based product consists of the development of bird-watching spots such as Northern and Southern Lagoon and to develop further man-made facilities to diversify the local offer. Belize Reef's nature-based tourism product mostly includes water-based activities and tourism services structured around them to cater to the needs of day visitors.

As described above, the graph below illustrates the product development phases by destination:

		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Western Belize	Nature-based																				
South Eastern Coast	Nature-based																				
Central Coast Belize	Nature-based																				
Northern Islands	Nature-based																				
Southern Belize	Nature-based																				
Northern Belize	Nature-based																				
Belize Reef	Nature-based																				

Description of the program

The Program for Nature-based Tourism Development structures Belize's ecotourism and adventure tourism products into a system of themed trails through the country. It also provides itineraries and nature walking trails to give better access to nature-based tourism assets.

The program suggests the development of man-made nature-tourism based activities which should be structured into integrated recreational ecotourism and adventure sites and centers. In addition, it designs diverse nature-based themed routes and trails, such as the National Nature Tourism Trail System and a National Caving Trail System, catering to the interests and needs of different segments. Those routes and trails should provide visitors with support services for their experience, taking into account the particularities of nature-based products.

The creation of mechanisms preventing the destination's degradation will be addressed in order to mitigate criminal activities, degradation of the natural resources through the development of codes of conduct, best practice manuals, sustainable maintenance plans for ecotourism and adventure tourism sites and awareness campaigns to prevent social conflicts resulting from the implementation of the tourism product. The program develops continuous training modules for general and special interest nature tour guides (e.g. for caving, trekking, etc.).

The Program for Nature-based Tourism Development is to develop three projects for nature-based business & product development, namely:

- ▶ The concept development for **Belize's Ecotourism & Adventure Activity Centers** which provide the visitor with information and an introduction to the destination, its assets and its tourism products.

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- ▶ The design, master plan and development of **Ecotourism & Adventure Routes** linking together Belize's different nature-based tourism sites and structuring them as attractive tourism destinations.
- ▶ The concept of **Integral Development of Ecotourism and Adventure Sites** which structures, designs, master plans and develops sites into a integrated system of infrastructure, services and facilities, developing the entire value chain.

Lead stakeholders

BTB's Nature-based Tourism Product Manager as main organizer in partnership with the private sector located at the destinations, local university scholars and ecologists will together lead and act as main development drivers to assure the products' sustainability by strongly involving stakeholder participation and focusing on the mitigation of potential risks. Special focus should be given to the participation of environmental NGOs and the Ministry of Economic Development to identify inclusion possibilities and mechanisms for ethnic groups and inhabitants of rural areas. MTCAC (strengthened by NSTTF) would be the lead stakeholder in charge of the policies, development of master planning and identification of funding sources. Furthermore, BTB should develop specific guidelines on how to structure and offer ecotourism and adventure tourism at the destinations.

Objectives

The Belize 2030 objectives of the Nature-based Tourism Development Program are:

- ▶ To enhance the visitor's experience at natural sites by encouraging site and asset development
- ▶ To enhance Belize's nature-based tourism competitiveness by diversifying the tourism portfolio into different experiences such as eco tourism, soft adventure tourism, hard adventure tourism, recreational tourism.
- ▶ To further distribute tourism flows by enhancing access to cultural sites through the improvement and paving of roads/trails, and developing signage, road lights, safety conditions and parking at the sites.
- ▶ To harness nature-based tourism as a tool fostering sustainability by utilizing it as a tool for enhancing local participation and reducing poverty, through the diversification of the tourism product's value chain.

Milestones

Review Years	Milestones
2015	<ul style="list-style-type: none"> ▶ Elaboration and definition of ecotourism and adventure tourism land use plan including product specific regulations, norms and law developments ▶ Design of Belize's Ecotourism and Adventure Tourism Brand ▶ Conceptualized, designed and launched awareness campaign for nature-based tourism ▶ Development of training modules, identification of training institutions and capacitating of skilled nature-based tourism personnel ▶ Creation of specific promotion material and communication of Belize's ecotourism and adventure tourism offer ▶ Integral development of the Ecotourism and Adventure Sites ▶ Consolidated road, trail and sea accessibility to nature-based tourism sites/destinations/activities

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	<ul style="list-style-type: none"> Design of the safety and security guidelines for ecotourism and adventure tourism Creation of the Ecotourism and Adventure tourism asset management and conservation system and the nature based tourism inclusion mechanisms
2020	<ul style="list-style-type: none"> Initiated Integrated Quality Management system for ecotourism and adventure tourism operators Launch and execution of Nature-based tourism product club managed by BTB
2025	<ul style="list-style-type: none"> Undertaken product specific awareness campaigns Finalized trail projects, such as Belize National Caving Trail and Belize National Nature Trail and Belize's Ecotourism and Adventure Activities Centers Consolidation of support services at the first priority destinations
2030	<ul style="list-style-type: none"> Continuous management and implementation

Sub-programs and projects

1.2.1 Sub-program for Business & Product Development of Nature-based Tourism	
Description and Projects	Time frame
<p>The sub-program develops the Ecotourism and Adventure Tourism product by developing diverse man-made facilities and creates specific nature-based tourism accommodation to diversify the nature tourism product and the tourist's experience. Special focus should be given to sustainable development criteria of nature-based tourism growth and conservation efforts of protected areas. The product development involves the creation of nature-based tourism interpretation activities presenting Belize's biodiversity.</p> <ul style="list-style-type: none"> Project 1: Belize's Ecotourism & Adventure Activity Centers. Belize could offer a wide range of Ecotourism & Adventure Activity Centers all through the national territory, in rainforests, at sea and/or in protected areas. These centers use natural elements to offer sporting activities, ecotourism and leisure activities for all tourists and visitor segments. These centers could be public, private and/or community managed and should be certified by BTB nature-based tourism product manager. Tasks: <ul style="list-style-type: none"> Activity Centers Concept development Identification of priority centers to be developed. Business plan, master plan, building program, construction and operation Maintenance and monitoring Project 2: Ecotourism & Adventure Routes. This project aims to design, develop and enhance commercial routes according to segments interest. Tasks for the project are: <ul style="list-style-type: none"> Ecotourism & Adventure Routes development plan, in order to identify them, select and prioritize the ones to be developed. Design and develop national trails including master planning its path and basic/tourism related infrastructure (garbage bins, signage along the trail, accommodation and food & beverage facilities nearby, visitor information equipment, first-aid/medical center, etc). Tour operators and tourism sector involvement. Packaging and commercializing processes <p>Priority routes to develop:</p> <ul style="list-style-type: none"> Belize National Caving Trail/Route Belize National Nature Trail/Route Belize Bird-watching Route Reef Life Route <p>Other suggested routes:</p>	<p>Project 1: Starting date: 2012 Implementation: 14 years</p> <p>Project 2: Starting date: 2013 Implementation: ongoing according to destination potential and market demand. (2030) Total: 18 years</p> <p>Project 3: Starting date: 2015 Implementation: 2 years for each Integral Development Site, Total: 11 years</p>

1.2.1 Sub-program for Business & Product Development of Nature-based Tourism

- Mangrove Route
- Scuba Diving Route
- Monkey Trails
- Belize trekking route

► **Project 3: Integral Development of Ecotourism and Adventure Sites.**
Development of ecotourism and adventure tourism sites by structuring activities in the destination, in order to supply all the visitor experience value chain.

- These integral development destinations include the Ecotourism & Adventure Centers as a key meeting point for tour operations that could also be structured within natural protected areas.
- It will also cover development of restaurants or food supply, accommodation in the area (any kind), interpretation equipments (panels, signs, trail marks, etc.); tour guide services, technical shops (sport clothes, adventure equipments, books and maps, GPS, etc.); souvenir shops, scientific areas (if needed or appropriate), downloadable geo-data, leisure areas with picnic areas etc. and the required infrastructure required (such as parking spaces, toilettes, welcome and reception area, interpretation center, etc.)
- These sites have to be integrally developed before moving investments and buildings to another one. No other site has to be under construction until one is fully completed. This is a main principle of these integral development sites, which are aligned with the overall approach and sustainability of the NSTMP of Belize.
- This will require:
 - A **market and feasibility study** providing information on the potential market segments that will be targeted and hence how the products will be conceptualized and offered.
 - The **business model** (based on the conclusions and results from the demand analysis) of each site and the mix of activities, attractions and services it could include. A technical **land planning study** to master plan the area including all its different tourism services and activities and its basic services and infrastructures. This involves structuring the nature-based tourism types of services offered along trails/routes and specific hubs/destinations that cater to mainly nature based tourism market segments.
 - Business development, professionalization and capacity skills development of private sector SME and community tourism organizations
 - Specific **laws and regulation** according to Belize's land policy and operational guidelines.
 - Development of **Offering Memorandums** in order to inform potential investors on the investment possibilities along the routes and state the objectives, business opportunities and terms of investment. Investor/Operator research (or search for international brands or retailers) and negotiations.
 - Negotiation and contracting of developers and operators.

Lead Responsible	Strategic Partners
BTB (product development)	Beltraide, Ministry of Economic Development, NSTTF, BTIA, Belize Audubon Society, Ministry of Natural Resources and the Environment, Toledo Institute for Development and Environment (TIDE), Toledo Ecotourism Association
Destinations for implementation	
Nationwide	
Estimated cost (USD)	Potential financing sources
USD 9,100,000	Private tourism sector investment, BTB, Ministry of Natural Resources and the Environment, Multilateral donors

1.2.2 Sub-program for Infrastructure and Accessibility of Nature-based Tourism

Description and Projects		Time frame
<p>The sub-program for the development of infrastructure and support services for Nature-based Tourism destinations will include different improved and enhanced access possibilities for individual travelers and for large groups arriving to Belize’s nature-based tourism sites.</p> <p>► Project 1. Road, trail and sea accessibility. The project enhances the access infrastructure on the main land and on the islands by improving the quality and the road pavement and further sea routes in order to better access nature tourism sites. This project is focused to provide accessibility from main national roads and villages to main nature sites (ie. from the Western Highway to Mountain Pine Ridge, Chicquibul Cave and ATM cave; from San Pedro to Bacalar Chico National Park; from Western Highway to Northern Lagoon and Southern Lagoon). Besides pavement and routes, equipment has to be provided, such as signage and maintenance where required in order to enable a safe arrival/departure from and to the ecotourism and adventure tourism destinations.</p> <p>► Project 2. Basic services consolidation. Assess and develop the required needs for each nature tourism site and in nature protected areas that offer nature-based tourism sites/assets/activities in order to provide sufficient support service supply (waste collection and management, energy, water, etc.) for the correct operation of nature tourism in destinations, routes and sites, according to the kind and level of use of each site.</p>		<p>Project 1: Starting date: 2012 Duration: continuous</p> <p>Project 2: Starting date: 2015 Duration: 11 years</p>
Lead Responsible	Strategic Partners	
BTB (product development)	NSTTF BTIA Ministry of Works Local Municipalities Belize Audubon Society Ministry of Natural Resources and the Environment	
Destinations for implementation		
Western Belize, Central Coast Belize, Southern Eastern Coast Belize, Northern Belize, Southern Belize, Northern Islands, Belize Reef		
Estimated cost (USD)	Potential financing sources	
USD 47,800,000	Ministry of Works Local Municipalities NSTTF Private Investors, Operators	

1.2.3 Sub-program for Marketing and Awareness of Nature-based Tourism

Description and Projects	Time frame
<p>The sub-program of the operational marketing development for Nature Based and Adventure Tourism includes the development of a brand and declinations. The sub-program includes marketing, promotion and communication possibilities dedicated to enhanced sales of Belize's ecotourism and adventure tourism products and mechanisms to increase the awareness of benefits resulting from ecotourism and adventure tourism.</p> <ul style="list-style-type: none"> ▶ Project 1. Belize Ecotourism & Adventure Tourism Brands. Development of the Belize Ecotourism and Adventure Tourism brand in accordance with BTB's national brand. ▶ Project 2. Nature Tourism product clubs. Establishment of the nature tourism clubs to structure the product for different market segments. E.g. diving & snorkeling, water sports activities, adventures on land and on the water, ecotourism, trekking, bird-watching, caving, etc. ▶ Project 3. Promotion, communication & PR. Development of marketing collaterals (such as sales brochures and other printed product information including sales presentations, web content). The marketing activities should introduce Ecotourism and adventure Tourism destinations and feasible itineraries of nature-based activities although the country. <ul style="list-style-type: none"> • Development of a specific web-pages for Nature-based tourism on BTB's web-site linking to specific themed web-pages: <ul style="list-style-type: none"> i. Ecotourism (including nature trails and bird-watching) ii. Adventure Tourism (including water and land based sports) iii. Diving and snorkeling • Development of marketing collaterals • Development of an annual marketing plan for nature based and adventure tourism • Development of marketing kits and promotional items and give-aways. • Participation in nature-based tourism fairs, e.g.: <ul style="list-style-type: none"> i. USA: Outdoor Sports and Travel Expo, Los Angeles Times Travel & Adventure Show ii. Canada: Salon International Tourism Voyage (Vancouver), Travel & Vacation Show (Ottawa) iii. Europe: ITB-Berlin, World Travel Market (UK), BIT-Milan (IT) • Advertising in magazines, e.g.: <ul style="list-style-type: none"> i. USA: National Geographic Traveler Magazine, Islands ii. Canada: Canadian World Traveller iii. Europe: Wanderlust Magazine (UK), Moran (GER), Bird Watching (UK) • Advertising on websites, e.g.: <ul style="list-style-type: none"> i. USA: www.lonelyplanet.com, www.thetravelmagazine.net, www.goworldtravel.com, www.audobonmagazine.org, www.wikitravel.org, www.tripadvisor.com ii. Europe: www.nahfernreisen.de, www.stefan-loose.de, www.geo.de (GER); www.wanderlust.co.uk, www.lonelyplanet.co.uk, www.footprint-adventures.co.uk (UK) • Participation in diving tourism fairs, e.g.: <ul style="list-style-type: none"> i. USA: BTS – Beneath the Sea, Our World Under Water Show ii. Europe: Boot Diving Show (GER) • Advertising in magazines, e.g.: <ul style="list-style-type: none"> i. USA: Scuba Diving Magazine, SeaDuction ii. Canada: DIVER Magazine 	<p>Project 1: Starting date: 2013 Implementation: 1 year</p> <p>Project 2: Starting date: 2021 Duration: continuous</p> <p>Project 3: Starting date: 2012 Duration: continuous</p> <p>Project 4: Starting date: 2013 Implementation: 15 years</p>

1.2.3 Sub-program for Marketing and Awareness of Nature-based Tourism

<ul style="list-style-type: none"> iii. Europe: Tauchen (GER) <ul style="list-style-type: none"> • Advertising on websites, e.g.: <ul style="list-style-type: none"> i. USA: www.scubadiving.com, www.underwaterjournal.com, www.divespots.com, www.travelfish.org ii. Canada: www.divermag.com, www.cyberdiver.com iii. Europe: www.divemagazine.co.uk (UK) ▶ Project 4. Product specific awareness development. Development of awareness programs and campaigns for stakeholders considering specific risks related to the development of nature-based, ecotourism and adventure tourism. <ul style="list-style-type: none"> • Development of awareness to educate stakeholders on feasible practices to mitigate ecotourism and adventure tourism sites/attractions/paths degradation and enhance the preservation of ecotourism and adventure tourism sites • Development of awareness campaigns for citizens to raise awareness on the importance and significance of the development of nature-based tourism, including possible activities for participation and benefiting from the economic activities. 	
Lead Responsible	Strategic Partners
BTB (marketing department)	BTB (product development) Tour Operator Healthy Reef, Programme for Belize, Shipstern Nature Reserve, Bladen Nature Reserve, Belize Audubon Society
Destinations for implementation	
Western Belize, Central Coast Belize, Southern Eastern Coast Belize, Northern Belize, Southern Belize, Northern Islands, Belize Reef	
Estimated cost (USD)	Potential financing sources
USD 24,880,000	BTB (marketing budget) Ministry of Tourism Municipalities Local NGOs

1.2.4 Sub-program for Standards and Safety & Security Assurance of Nature-based Tourism

Description and Projects	Time frame
<p>The sub-program for the safety and security development of Ecotourism and Adventure Tourism focuses on operational guidelines to prevent incidents and the development of negative impacts from nature-based tourism products. It consists of developing strategies, laws, law enforcement and preventive/reactive mechanisms to enhance visitors' safety, security and their experience.</p> <ul style="list-style-type: none"> ▶ Project 1. Operational guidelines. This project will structure the ecotourism and adventure tourism product into an integrated system of operational safety and security standards and guidelines which should become legal articles in specific tourism acts. <ul style="list-style-type: none"> • Development of Code of Conducts and Best Practice Manuals for visitors, tourists, employees and residents, providing guidelines, law excerpts and fines imposed for disrespectful interaction with sensitive areas such as the reef preservation and conservation • Development of maintenance plans and schedules to keep the site clean, functioning and safe in order to enhance its preservation • Provide training and promotion of sustainable fisheries and a fishing plan to avoid overfishing of the sea and the rivers • Development of policy and law enforcement that ecotourism and adventure tourism sites should only be guided through accredited guides. • Licensing requirements for tour operators operating at ecotourism and adventure tourism sites require an operational plan including a disclaimer and tour guide instructional talk in order to introduce the activity and inform about the risks associated to the activity of adventure sports: caving, trekking, kayaking, bird watching, scuba diving, etc. • Licensing requirements for operators concerning specific equipment standards and maintenance plans. In addition, each water-based operator should develop his own intentions of protecting his main resource by providing a Reef Water Quality Protection Plan including his code of conduct. • Development of safety information material for scuba diving and snorkeling, for ecotourism and for adventure tourism activities informing on important safety information for tourists. ▶ Project 2. Safety & security for ecotourism & adventure tourism. Development of specific emergency management plans to reduce the potential harm/damage caused by crises occurring in ecotourism and adventure tourism destinations. <ul style="list-style-type: none"> • Police stations in the area and services offered by the Tourism Police Unit to assist tourists requiring help and assistance. • Increase surveillance and strong law enforcement on people and incidents that harass tourists, e.g. armed robbers, petty thieves, etc. at nature-based, ecotourism and adventure tourism sites. • Development of specific risk management plans for ecotourism and adventure tourism destinations and tourism operators, including incidents resulting from flooding, hurricane, mass panic, fires, etc. • Development of facilities providing first aid and health assistance prepared to attend and heal adventure tourism specifics (e.g. bone fractures, snake bites, poisonous insects, wild animal attacks, etc.) • Development of a search and rescue mechanism and task team force prepared to respond to product specific emergency rescue missions, such as search for lost or endangered visitors in the jungle, under water, or rescue emergencies for adventure tourism activities, etc. ▶ Project 3. Integrated Quality Management system. Development of best practice guidelines for ecotourism and adventure tourism operators for voluntary adhesion to the national IQM system. 	<p>Project 1: Starting date: 2013 Duration: 2 year Update in 2020 for 2 years Total: 4 years</p> <p>Project 2: Starting date: 2015 Duration: continuous</p> <p>Project 3: Starting date: 2021 Duration: continuous</p>

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1.2.4 Sub-program for Standards and Safety & Security Assurance of Nature-based Tourism

Lead Responsible	Strategic Partners
BTB (product development) Ministry of Tourism	NSTTF BTIA Belize National Tour Operator Association Belize Tour Guide Association Ministry of Police and Public Safety Belize Audubon Society Ministry of Natural Resources and the Environment
Destinations for implementation	
Western Belize, Central Coast Belize, Southern Eastern Coast Belize, Northern Belize, Southern Belize, Northern Islands, Belize Reef	
Estimated cost (USD)	Potential financing sources
USD 3,000,000	BTB (product development budget) Ministry of Police and Public Safety BTB - Licensing fees

1.2.5 Sub-program for Capacity Building of Nature-based Tourism

Description and Projects		Time frame
<p>The sub-program for the development of capacity building modules and training for stakeholders involved in ecotourism and adventure tourism activities (or tourism related activities) provides tour guide seminars in particular for deeper knowledge and understanding of Belize's flora and fauna as well as adventure tourism specifics such as first aid, individual panic attacks, and extreme situations. The sub-program hence develops skilled personnel and enhances the tourism experience.</p> <p>▶ Project 1: Continuous training. This project develops special modules for an enhanced service delivery to ecotourism's and adventure tourists' needs and experiences in Belize up to international quality standards.</p> <ul style="list-style-type: none">• Development of certification programs for specific special interest tour guide activities such as for adventure sports such as caving, mountaineering, kayaking, rock climbing, etc.• Development of modules for enhanced conservation and preservation techniques of natural tourism sites (for employees, operators, citizens living and operating in ecotourism and adventure tourism destination or buffer areas.• Development of training modules to enhance the capacities of ecotourism and adventure site staff and managers (e.g. data gathering and analysis, general site management plans, carrying capacity studies, site monitoring plans, interpretative plans, conservation plans and operating plans)• Models for business development, professionalization and capacity skills development of private sector SME and community tourism organizations		<p>Project 1: Starting date: 2015 Duration: continuous</p>
Lead Responsible	Strategic Partners	
BTB (product development)	BTB (quality development) BTIA BHA BTGA National training institutions (universities, vocational training centers, etc.) Belize Audubon Society	
Destinations for implementation		
Western Belize, Central Coast Belize, Southern Eastern Coast Belize, Northern Belize, Southern Belize, Northern Islands, Belize Reef		
Estimated cost (USD)	Potential financing sources	
USD 2,400,000	Student Fees BTB Private sector Multilateral donors	

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1.2.6 Sub-program for Sustainability of Nature-based Tourism

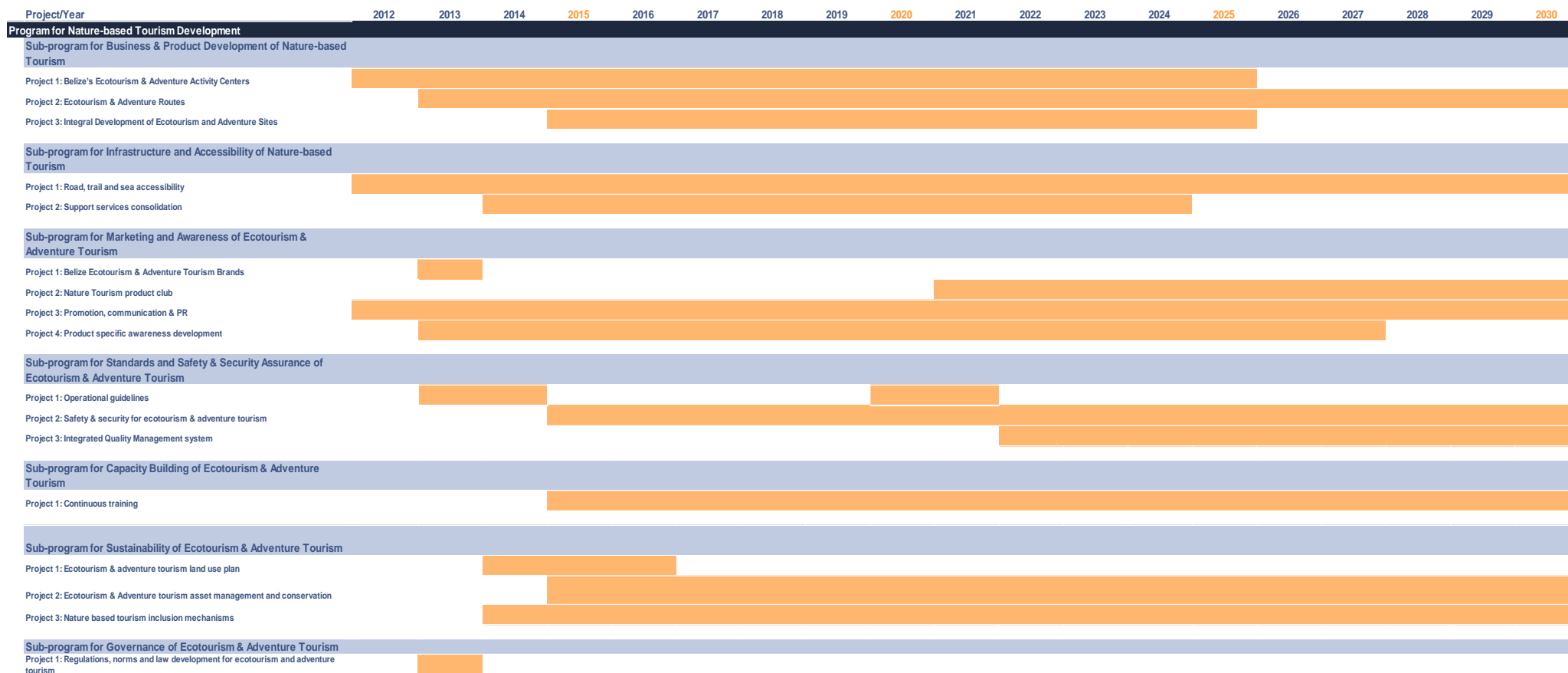
Description and Projects		Time frame
<p>The sub-program for the long-term sustainability in Ecotourism & Adventure Tourism development designs mechanisms to assure that the social safe guards and the land/ecosystem's protection, conservation and economic development requirements are met.</p> <p>➤ Project 1. Ecotourism & adventure tourism land use plan. The plan will structure Belize's ecotourism and adventure tourism destinations as a product, mapping each destination with:</p> <ul style="list-style-type: none">• Identification of ecotourism and adventure tourism specific sites for ecotourism and adventure tourism product development• The prioritization of sites and investment plan• Environmental and social safeguards to consider for tourism in each site• And the development of a site land use framework including land use definition with safeguards and a database for the monitoring of scientific data <p>➤ Project 2. Ecotourism & Adventure tourism asset management and conservation. This project defines ecotourism and adventure tourism safeguards that should be considered when developing sites and activities.</p> <ul style="list-style-type: none">• Hence, it requires the identification and assessment of the vulnerability of ecotourism and adventure tourism resources• The development of indicators, responsibilities and roles for monitoring, reporting and communication processes to create a set of offensive and defensive strategies, which will help to maintain sustainable and structured development of the tourism product• And an annual monitoring and evaluation system of the impacts caused by ecotourism and adventure tourism.• Provide incentives for nature conservation initiatives undertaken by the private and civic tourism sector. <p>➤ Project 3. Nature based tourism inclusion mechanisms. Identification and activation of mechanisms adapted for the Belize destination's reality to reduce poverty through Nature-based Tourism, to involve communities and to support their economic initiatives providing employment opportunities to citizens, micro-enterprise and opportunities to become suppliers to the eco-tourism and adventure tourism industry.</p>		<p>Project 1: Starting date: 2014 Implementation: 2 years</p> <p>Project 2: Starting date: 2015 Duration: continuous</p> <p>Project 3: Starting date: 2014 Duration: continuous</p>
Lead Responsible	Strategic Partners	
BTB (product development)	NSTTF Municipalities Local NGO PACT Ministry of Economic Development Universities and scholars	
Destinations for implementation		
Western Belize, Central Coast Belize, Southern Eastern Coast Belize, Northern Belize, Southern Belize, Northern Islands, Belize Reef		
Estimated cost (USD)	Potential financing sources	
USD 4,950,000	NSTTF Municipalities Private investors PACT	

1.2.7 Sub-program for Governance of Nature-based Tourism

Description and Projects		Time frame
<p>The sub-program for the legislation amendments of Ecotourism & Adventure Tourism development focuses on the existing and other or new regulatory frameworks that govern the safety and sustainability of Belize's ecotourism and adventure tourism destinations.</p> <p>▶ Project 1. Regulations, norms and law development for ecotourism and adventure tourism. This project focuses on existing Act or develops new regulative frameworks to incorporate product-specific laws for each component of the ecotourism and adventure tourism value chain aiming at enhancing and improving the Nature-based Tourism offer. Hence the act could include regulatory articles on areas such as:</p> <ul style="list-style-type: none">• Development of regulations, laws and enforcing to ensure the safety conditions of nature-based trails, equipment utilized, etc.• Development of site management and building plans including a calculation of the maximum day visit capacities and strong law enforcement if these numbers are being exceeded.• Development of policy to guide tourism development in and around protected areas i.e. -concession agreements.		<p>Project 1: Starting date: 2013 Implementation: 1 year</p>
Lead Responsible	Strategic Partners	
BTB	Ministry of Natural Resources and the Environment Municipalities Universities and scholars	
Destinations for implementation		
Western Belize, Central Coast Belize, Southern Eastern Coast Belize, Northern Belize, Southern Belize, Northern Islands, Belize Reef		
Estimated cost (USD)	Potential financing sources	
USD 250,000	Ministry of Natural Resources and the Environment Ministry of Tourism Municipalities	

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1.2.8 Nature-based Tourism Development Implementation



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1.2.9 Nature-based Tourism Development Cost Model

Nature-Based Tourism Product Budget

Project/Year	Total (US\$)	2012	2013	2014	2015	2016	2017	2018	2019	2020
Program for Nature-based Tourism Development	92,380,000	4,000,000	5,580,000	9,730,000	10,360,000	7,790,000	5,180,000	5,180,000	4,780,000	4,780,000
Sub-program for Business & Product Development of Nature-based Tourism	9,100,000	500,000	1,600,000	1,400,000	1,400,000	700,000	700,000	700,000	300,000	300,000
Project 1: Belize's Ecotourism & Adventure Activity Centers	5,700,000	500,000	1,000,000	1,000,000	1,000,000	500,000	500,000	500,000	100,000	100,000
Project 2: Ecotourism & Adventure Routes	3,400,000		600,000	400,000	400,000	200,000	200,000	200,000	200,000	200,000
Project 3: Integral Development of Ecotourism and Adventure Sites	10,400,000				1,000,000	2,000,000	2,000,000	1,000,000	1,000,000	1,000,000
Sub-program for Infrastructure and Accessibility of Nature-based Tourism	47,800,000	2,500,000	2,500,000	6,200,000	6,200,000	5,400,000	2,900,000	2,900,000	2,900,000	2,900,000
Project 1: Road, trail and sea accessibility	43,000,000	2,500,000	2,500,000	5,000,000	5,000,000	5,000,000	2,500,000	2,500,000	2,500,000	2,500,000
Project 2: Support services consolidation	4,800,000			1,200,000	1,200,000	400,000	400,000	400,000	400,000	400,000
Sub-program for Marketing and Awareness of Ecotourism & Adventure Tourism	24,880,000	1,000,000	1,130,000	1,080,000	1,060,000	1,060,000	1,050,000	1,050,000	1,050,000	1,050,000
Project 1: Belize Ecotourism & Adventure Tourism Brands	50,000		50,000							
Project 2: Nature Tourism product club	5,000,000									
Project 3: Promotion, communication & PR	19,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
Project 4: Product specific awareness development	830,000		80,000	80,000	60,000	60,000	50,000	50,000	50,000	50,000
Sub-program for Standards and Safety & Security Assurance of Ecotourism & Adventure Tourism	3,000,000	-	100,000	50,000	300,000	300,000	200,000	200,000	200,000	200,000
Project 1: Operational guidelines	300,000		100,000	50,000						100,000
Project 2: Safety & security for ecotourism & adventure tourism	2,300,000				300,000	300,000	200,000	200,000	200,000	100,000
Project 3: Integrated Quality Management system	400,000									
Sub-program for Capacity Building of Ecotourism & Adventure Tourism	2,400,000	-	-	-	150,000	150,000	150,000	150,000	150,000	150,000
Project 1: Continuous training	2,400,000				150,000	150,000	150,000	150,000	150,000	150,000
Sub-program for Sustainability of Ecotourism & Adventure Tourism	4,950,000	-	-	1,000,000	1,250,000	180,000	180,000	180,000	180,000	180,000
Project 1: Ecotourism & adventure tourism land use plan	1,800,000	-	-	900,000	900,000		-	-	-	-
Project 2: Ecotourism & Adventure tourism asset management and conservation	1,450,000	-	-	-	250,000	80,000	80,000	80,000	80,000	80,000
Project 3: Nature based tourism inclusion mechanisms	1,700,000	-	-	100,000	100,000	100,000	100,000	100,000	100,000	100,000
Sub-program for Governance of Ecotourism & Adventure Tourism	250,000	-	250,000	-	-	-	-	-	-	-
Project 1: Regulations, norms and law development for ecotourism and adventure tourism	250,000	-	250,000	-	-	-	-	-	-	-
TOTAL BUDGET NATURE-BASED TOURISM MACRO PROGRAM	92,380,000.00	4,000,000.00	5,580,000.00	9,730,000.00	10,360,000.00	7,790,000.00	5,180,000.00	5,180,000.00	4,780,000.00	4,780,000.00

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Nature-Based Tourism Product Budget

Project/Year	Total (US\$)	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Program for Nature-based Tourism Development	92,380,000	3,970,000	3,920,000	3,920,000	3,920,000	3,820,000	3,120,000	3,120,000	3,070,000	3,070,000	3,070,000
Sub-program for Business & Product Development of Nature-based Tourism	9,100,000	200,000	200,000	200,000	200,000	200,000	100,000	100,000	100,000	100,000	100,000
Project 1: Belize's Ecotourism & Adventure Activity Centers	5,700,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
Project 2: Ecotourism & Adventure Routes	3,400,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
Project 3: Integral Development of Ecotourism and Adventure Sites	10,400,000	1,000,000	500,000	300,000	300,000	300,000					
Sub-program for Infrastructure and Accessibility of Nature-based Tourism	47,800,000	1,700,000	1,700,000	1,700,000	1,700,000	1,600,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
Project 1: Road, trail and sea accessibility	43,000,000	1,600,000	1,600,000	1,600,000	1,600,000	1,600,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
Project 2: Support services consolidation	4,800,000	100,000	100,000	100,000	100,000						
Sub-program for Marketing and Awareness of Ecotourism & Adventure Tourism	24,880,000	1,550,000	1,550,000	1,550,000	1,550,000	1,550,000	1,550,000	1,550,000	1,500,000	1,500,000	1,500,000
Project 1: Belize Ecotourism & Adventure Tourism Brands	50,000										
Project 2: Nature Tourism product club	5,000,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000
Project 3: Promotion, communication & PR	19,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
Project 4: Product specific awareness development	830,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000			
Sub-program for Standards and Safety & Security Assurance of Ecotourism & Adventure Tourism	3,000,000	190,000	140,000	140,000	140,000	140,000	140,000	140,000	140,000	140,000	140,000
Project 1: Operational guidelines	300,000	50,000									
Project 2: Safety & security for ecotourism & adventure tourism	2,300,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
Project 3: Integrated Quality Management system	400,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000
Sub-program for Capacity Building of Ecotourism & Adventure Tourism	2,400,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000
Project 1: Continuous training	2,400,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000
Sub-program for Sustainability of Ecotourism & Adventure Tourism	4,950,000	180,000	180,000	180,000	180,000	180,000	180,000	180,000	180,000	180,000	180,000
Project 1: Ecotourism & adventure tourism land use plan	1,800,000	-	-	-	-	-	-	-	-	-	-
Project 2: Ecotourism & Adventure tourism asset management and conservation	1,450,000	80,000	80,000	80,000	80,000	80,000	80,000	80,000	80,000	80,000	80,000
Project 3: Nature based tourism inclusion mechanisms	1,700,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
Sub-program for Governance of Ecotourism & Adventure Tourism	250,000	-	-	-	-	-	-	-	-	-	-
Project 1: Regulations, norms and law development for ecotourism and adventure tourism	250,000	-	-	-	-	-	-	-	-	-	-
TOTAL BUDGET NATURE-BASED TOURISM MACRO PROGRAM	92,380,000,00	3,970,000,00	3,920,000,00	3,920,000,00	3,920,000,00	3,820,000,00	3,120,000,00	3,120,000,00	3,070,000,00	3,070,000,00	3,070,000,00

1.3 Program for Sun & Beach Tourism Development

Product Concept

This tourism product refers to relaxation activities on or near the beach. There are two different types:

- ▶ **Conventional Sun & Beach Tourism:** A standard beach resort is a place used for relaxation or recreation, attracting visitors for holidays or vacations. Such a self-contained resort attempts to provide for most of a vacationer's wants while remaining on the premises, such as food, drink, lodging, sports, entertainment, and shopping. The term "resort" may also be used to identify a hotel property that provides an array of amenities and typically includes entertainment and recreational activities.
- ▶ **Luxury Sun & Beach Tourism:** A luxury resort is an expensive vacation facility which is fully staffed and has a five star rating. Luxury resorts often host many visitor activities and attractions such as golf, water sports, spa and beauty facilities, skiing, natural ecology and tranquility. Because of the extent of amenities offered, a luxury resort is also considered a destination resort.

Complementary activities mostly undertaken within Sun & Beach Tourism are: fishing, scuba diving, sailing, golf, water skiing, whale watching, windsurf, relaxation therapies, spa, evening entertainment, snorkeling, and dance classes.

Gaps identified – Diagnostic

Belize's strengths are the Caribbean beaches and islands combined with its sub-tropical climate. This natural heritage is one of Belize's most valuable, but also most vulnerable assets. The ecological sensitivity of the marine sanctuary with its fascinating submarine world and the barrier reef need to be protected and preserved in order to serve future generations.

- ▶ Currently the sun & beach tourism product is almost nonexistent in Belize. At present, Sun & Beach Tourism is only offered in Stann Creek District; however, other potential beaches in other areas around Belize are being neglected.
- ▶ Belizean beaches are mainly used as natural arrival and parking infrastructure (for boats) and/or as pedestrian paths rather than as area for relaxation.
- ▶ Beaches do not offer basic and specific infrastructure and support services (showers, toilettes, beach clubs, sun & beach resorts, spas, etc)
- ▶ Belize's beaches are not being safeguarded in terms of safety and environmental issues.

Vision Sun & Beach Tourism 2030

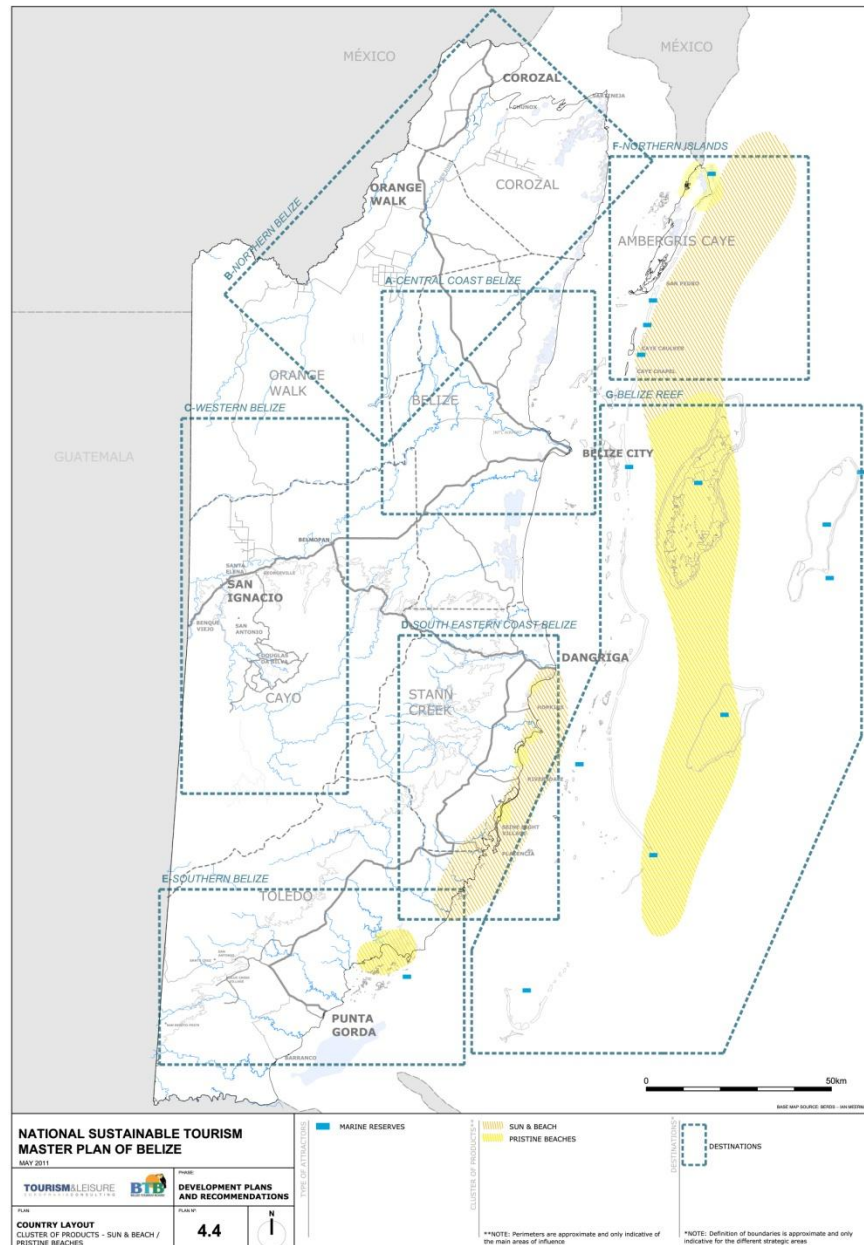
Sun & Beach tourism currently only exists in South Eastern Coast Belize and to a very small extent in Northern Islands. However, the product is currently in its introduction phase and is expected to reach a level beyond consolidation and on its way to maturity by 2030. Belizean beaches and coastlines will be enhanced through the development of pristine beaches, entertaining waterfronts and the development of new destinations that will undergo an integral development structuring specific facilities, infrastructures, and services into the overall sustainable national approach of the NSTMP. The product will offer the visitor a diverse portfolio including activities and facilities for both relaxation and entertainment.

Sun & Beach tourism destinations and product development

The map depicts areas where Sun & Beach tourism should be developed: Northern Islands, Belize Reef, South Eastern Coast Belize and Southern Belize. Based on the current and potential competitiveness, importance and attractiveness of its sun & beach assets, sun & beach

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tourism in Northern Islands and South Eastern Coast Belize has the potential to become the main tourism product and hence to act as a main tourist attractor to these destinations. In Belize Reef and Southern Belize sun & beach tourism will be regarded as a secondary tourism product.



Source: T&L

The Sun & Beach Tourism product development will be launched by 2012 with its first integrated destination development master planning in **South Eastern Coast Belize** (Placencia to Dangriga) intended to convert it into an exciting destination complementing the sun & beach tourism offer with water-based activities and living culture experiences. The South Eastern Coast Belize development is expected to continue beyond 2030; while the other three sun & beach destinations (Northern Islands, Southern Belize (Punta Negra) and Belize Reef) will be fully developed by 2030. The development involves waterfronts in Hopkins and Dangriga with buildings and facilities in typical Belizean architectural styles and vernacular materials.

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Northern Islands, especially in Ambergris Caye, will focus on remodeling the existing condominiums into mid/high end luxury sun & beach resorts. Belize Reef should develop a few resorts and sun & beach tourism assets/activities. The main asset of the sun & beach tourism product – the beaches – will be structured into natural relaxation zones offering water-based activities and pristine beaches. Furthermore, San Pedro will enjoy the development of a new waterfront providing an entertaining atmosphere along the shoreline.

Southern Belize will follow an integrated destination approach development in the area of Port of Honduras/Punta Negra and structure its few low density resorts and its pristine beaches to meet the demand of high-end customers.

Belize Reef will develop sporadic sun & beach resorts and develop pristine, natural beaches mostly catering to the needs of day visitors.

As described above, the graph below illustrates the product development phases by destination:

		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
South Eastern Coast	Sun and Beach																				
Northern Islands	Sun and Beach																				
Southern Belize	Sun and Beach																				
Belize Reef	Sun and Beach																				

Description of the program

The program suggests enhanced accessibility by providing additional land and marine routes, such as from Southern Highway to Punta Negra or to Riversdale and along the coast. Furthermore, the program suggests the development of integrated waterfront experiences in main tourism hubs (such as Hopkins, Belize City, San Pedro, Punta Gorda and Corozal Town) providing visitors with a concentrated area of restaurants, accommodations, entertainment facilities, local markets, etc.

The Program for Sun & Beach Tourism Development is to develop three projects for the business & product development, namely:

- ▶ **Belize Waterfront Experience Development** using the coastlines and structuring them into an attractive visitor asset providing diverse entertainment facilities and services.
- ▶ **Belize's Pristine Beaches**, the program provides a strong emphasis on the establishment, conservation and preservation of the beaches' pristine quality standards and safety regulations for which they will be internationally promoted and renowned.
- ▶ **Sun & Beach Destination Development** will structure the sun & beach destination with its required development projects depending on the destination's concept, the sustainable use of resources and on the existing demand. However, Southern Belize, South Eastern Coast Belize and Southern Belize will require designing and master planning of their destinations which are to be developed from the ground up.

Lead stakeholders

With cooperation between BTB's Sun & Beach Tourism Product Manager, NSTTF and the Ministry of Fisheries (especially the Department's Ecosystems Management Unit) as main leaders and development drivers, the products' sustainability is to be assured by strongly involving stakeholder participation and focusing on the mitigation of potential risks. Hence, a mechanism preventing the destination's degradation should be designed in order to mitigate criminality issues, the degradation of natural beaches, filling and dredging of beaches, coastal

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water pollution affecting the reef's health, and social conflicts caused by public exclusion from tourism benefits.

Objectives

The Belize 2030 objectives of the Sun & Beach Tourism Development Program are:

- ▶ To attract new markets and market segments by diversifying Belize's tourism product portfolio and increase the number of overnights spent at Belize's tourism destinations
- ▶ Enhance visitor satisfaction by developing the sun and beach portfolio by offering entertaining and charming water front experiences, services and activities for entertainment and relaxation, etc.
- ▶ To structure the tourist demand into new master planned sustainable sun & beach destinations by creating destinations with enhanced accessibility and service provision.
- ▶ To utilize tourism as a tool for harnessing Belize's eco-system and protecting beaches from degradation by applying for international quality standards such as Blue Flag Beaches with improved safety measures including life guards, first aid and medical centers, beach tourism police.
- ▶ To increase local participation and reduce poverty by utilize sun & beach tourism as a pro-poor tourism tool and implement pro-poor participation mechanisms.

Milestones

Review Years	Milestones
2015	<ul style="list-style-type: none"> ▶ Design of the Sun and beach tourism brand ▶ Regulation, laws and norm development for the Sun & Beach concept ▶ Definition of the safety and security guidelines for the destinations ▶ Development of the first Sun and Beach destination (South Eastern Coast Belize) ▶ Creation of the Sun and Beach asset management and conservation system ▶ Implementation of the Sun and Beach tourism inclusion mechanisms ▶ Improvement of the basic services of the Sun & Beach tourism companies ▶ Infrastructure development in the South Eastern Coast Belize destination ▶ Implementation of a continuous training for sun and beach tourism operations ▶ Launch of the promotion and PR campaign and product awareness program
2020	<ul style="list-style-type: none"> ▶ Completion of Belize waterfront experiences development ▶ Development of the integrated quality management system ▶ Improvement of the accessibility of the South Eastern Coast Belize and Northern Islands ▶ Completion of the operation guidelines and standards for sun and beach tourism ▶ Second and third phase of the Beach destination and sites land use plan
2025	<ul style="list-style-type: none"> ▶ Development of the Northern Island, Southern Belize, Belize Reef destination ▶ Creation of the Sun and Beach product club ▶ Second phase of access improvement to sun and beach destinations
2030	<ul style="list-style-type: none"> ▶ Continuous implementation and management

Proposed subprograms and projects

1.3.1 Sub-program for Business & Product Development of Sun & Beach Tourism

Description and Projects	Time frame
<p>This subprogram develops the sun & beach tourism product and provides business possibilities to the private sector. The essence lies in embellishing and preventing the degradation of beach areas and coastal landscapes and the enhancement of the visitors' experience by offering waterfront experiences in different parts of the country. Waterfront and pristine beaches aims to be concept models to be applied all over sun & beach destinations of Belize.</p> <p>► Project 1: Belize Waterfront Experience Development. This project develops a set of waterfronts at strategic sun & beach locations in Belize. Tourists will be able to enjoy Belize City Waterfront, Dangriga and Hopkins Waterfront, Punta Gorda and Corozal Waterfront (although Northern Belize is not further developed for sun & beach). The visitors will experience an entertaining and charming atmosphere located right by the water. The waterfront buildings should use typical Belizean architectural styles (e.g. colonial style housings). For each waterfront experience and the <i>Sub-program 1.3.2 Project 3: Infrastructure development for New Destination in South Eastern Coast Belize</i> following phases will have to be adapted on each destination:</p> <ul style="list-style-type: none"> • A market and feasibility study providing information on the potential market segments that will be targeted and hence how the products will be conceptualized and offered. • The business model (based on the demand analysis) for each waterfront area will offer a mix of activities, attractions and services such as local art and crafts markets, night markets, restaurants, bars, entertainment facilities, shopping possibilities, souvenir stalls, pedestrian areas and a waterfront promenade, accommodation facilities, parks, green zones, etc. • A technical land planning study to master plan the waterfront including all its different tourism services and activities and its basic services and infrastructures, such as land plots dedicated to the retail shopping area/restaurants/roads/entertainment area/commercial centers, etc. Followed by the execution of building, construction and the operational phase. • Development of offering memorandums in order to inform potential investors on the investment possibilities at the sun and beach destinations and state the objectives, the return on investment, the benefits and terms of investment. Investor/Operator research (or search for international brands or retailers) and negotiations. Negotiation and contracting of developers and operators • Specific laws and regulation according to Belize's land policy and operational guidelines. <p>► Project 2: Belize's Pristine Beaches. This project develops the sun & beach destinations' beaches into an attractive area for visitors searching for relaxation. This includes following phases:</p> <ul style="list-style-type: none"> • Potential evaluation and identification of public and private beaches • Development of sun and beach safeguarding instruments, by e.g. <ul style="list-style-type: none"> i. Development of conservation and protection mechanisms and monitoring system, including beach conservation laws and law enforcement. ii. BTB in charge of promoting international quality certification (such as Blue Flag) for pristine beaches and others in order to promote and monitor the beaches' development/degradation. Private beach owners will then be able to certify their beaches on a voluntary basis, whereby BTB should act as a facilitator and assistant to do so. • Development of beach models for each beach, being either private or public. <ul style="list-style-type: none"> i. Development of land use planning of public and private sun & beach natural areas including areas for relaxation, areas for merchants, areas for basic services such as showers and toilettes. ii. Definition and development of basic equipment and amenities for 	<p>Project 1: Starting date: 2016 Implementation: 2 years per waterfront</p> <p>Project 2: Starting date: 2015 Duration: 16 years</p> <p>Project 3: Starting date: 2012 Implementation: 19 years</p> <p>Project 4: Starting date: 2017 Implementation: 4 years</p> <p>Project 5: Starting date: 2021 Implementation: 4 years</p> <p>Project 6: Starting date: 2024 Implementation: 2 years</p>

1.3.1 Sub-program for Business & Product Development of Sun & Beach Tourism

<p>undeveloped beaches (i.e. traditional umbrellas, natural shade devices, etc.)</p> <p>iii. Life-guard and first aid services provided on both public and private beaches</p> <p>▶ Project 3: Development of destination 1: South Eastern Coast Belize. Sun and Beach will be the main tourism product structuring the product into an integral, attractive leisure and tourism destination attracting a mid-high end clientele from the main source markets, such as the United States and Europe. (Development: 2012-2030)</p> <p>▶ Project 4: Development of destination 2: Northern Islands. Sun and beach tourism will act as complimentary tourism product in Northern Islands. Although it does not require a new destination development master plan, it requires an investment plan. This investment plan is specifically important in order to assess the possibilities of remodeling the existing accommodation facilities. This will permit to meet expectations of a mid-high end clientele searching for relaxation between their scheduled water-based activities. The assessment study should also include an analysis of the existing condominiums and their potential of being restructured into sun & beach resorts. Furthermore, San Pedro could adopt the concept of centralizing its piers and collecting the piers' services.</p> <p>▶ Project 5: Development of destination 3: Southern Belize. Southern Belize will be the third destination to develop its sun & beach tourism product. The product will be located in the rural area of Punta Negra / Port of Honduras. It will require doing a Master Plan and looking for financial assistance. The integral destination should provide low density luxury resorts offering relaxation on pristine beaches complemented by a variety of nautical and nature-based sport activities. (Development: 2021-2025)</p> <p>▶ Project 6: Development of destination 4: Belize Reef. In terms of sun & beach tourism, Belize Reef will be the latest destination to be developed. This is reasoned by the fact, that Belize Reef should primarily be structured as day visitation destination. However, Belize's Reef sun & beach development does not require large investment as it will only consist of very few low density resorts attracting a mid/high-end clientele of international travelers. (Development: 2024-2029)</p>	
Main stakeholders	Secondary stakeholders
BTB (product development) NSTTF Private developers and business operators	Ministry of Fisheries (Ecosystems Management Unit) Beltraide, Ministry of Economic Development Coastal Zone Management Healthy Reef Ministry of Public Utilities Friends of Conservation and Development Protected Areas Conservation Trust Ministry of Natural Resources and the Environment
Destinations for implementation	
South Eastern Coast Belize, Northern Islands, Southern Belize, Belize Reef	
Estimated cost (USD)	Potential financing sources
USD 76,100,000	NSTTF Coastal Zone Management Protected Areas Conservation Trust Ministry of Natural Resources and the Environment Private developers and business operators

1.3.2 Sub-program for Infrastructure and Accessibility of Sun & Beach Tourism

Description and Projects	Time frame
<p>The sub-program for the development of the sun and beach tourism infrastructure and accessibility will include a planning phase to structure the destination as an integrated system of leisure activities (such as restaurants, bars, edutainment and/or entertainment facilities), accommodations, shopping possibilities, souvenir stalls, etc. and basic services. In addition, the destination will include different access possibilities making it easier for visitors to reach.</p> <ul style="list-style-type: none"> ▶ Project 1. Accessibility to sun & beach destinations. This project makes it easier and faster to reach the sun & beach destinations by further improving existing access routes or developing new ones. <ul style="list-style-type: none"> • Sea accessibility <ul style="list-style-type: none"> i. Improved planning and schedule co-ordination of sea transportation services in accordance with other itineraries of arrivals, such as ferries arriving from Honduras, international airline passengers, bus arrivals from Guatemala and Mexico, etc. E.g. by boat by providing additional sea routes from Punta Gorda to Punta Negra/Port of Honduras or from Monkey River to Punta Negra/Port of Honduras ii. Assessment of required new docking piers development, anchorage points and swimming piers per sun & beach destination • Land accessibility <ul style="list-style-type: none"> i. Improved land connectivity by developing and/or improving the roads (i.e. from main national roads and villages such as from Southern Highway to Punta Negra/Port of Honduras or from Southern Highway to the development between Riversdale and Hopkins) ii. Install traffic lights, signage and road lights where required in order to enable a safe arrival/departure from and to the sun & beach destinations ▶ Project 2. Basic services consolidation. The project requires assessment of the required infrastructure services such as waste disposal and management, energy, water, etc. in order to cater for the basic requirements to offer sun & beach tourism. <ul style="list-style-type: none"> • Ensure a functioning garbage collection management, waste treatment plants • Assessment of additional energy sources required in order to guarantee sufficient energy for residents, visitors and tourists during the tourism high season. • Assessment of additional water treatment plants in order to provide the destinations with sufficient potable water during the tourism high season • Enhance the basic services for telecommunications and banking services according to the destination's needs ▶ Project 3. Development for New Destination in South Eastern Coast Belize. With the assistance of NSTTF this project master plans, prepares and develops all facilities and equipments required to develop the new sun & beach tourism destination. The infrastructure master plan of the destination will contain roads, resorts, beach clubs, restaurants, commercial areas, entertainment areas, medical centers, police station, etc. <ul style="list-style-type: none"> • However, the master planning equally identifies the absolute balance between the economic development and the ecosystem' need for conservation. • Furthermore, master planning works with mechanisms preventing negative impacts and enhancing optimal operations and development in the destination, especially impacts that could affect Belize's natural resources and ecosystems. 	<p>Project 1: Starting date: 2012 Duration: 18 years</p> <p>Project 2: Starting date: 2013 Implementation: Destination 1: 2017-2024 Destination 2: 2013-2024 Destination 3: 2021-2024 Destination 4: 2022-2024 Total: 18 years</p> <p>Project 3: Starting date: 2013 Implementation: 1 year for master planning and then 16 years for development Total: 17 years</p>

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1.3.2 Sub-program for Infrastructure and Accessibility of Sun & Beach Tourism

Lead Responsible	Strategic Partners
BTB (product development) NTTSF	Ministry of Fisheries (Ecosystems Management Unit) Beltraide, Ministry of Economic Development Ministry of Works Coastal Zone Management – Authority & Institute Ministry of Labor, Local Government and Rural Development Ministry of Natural Resources and the Environment Ministry of Public Utilities
Destinations for implementation	
South Eastern Coast Belize, Northern Islands, Southern Belize, Belize Reef	
Estimated cost (USD)	Potential financing sources
USD 115,700,000	NTTSF Ministry of Works

1.3.3 Sub-program for Marketing and Awareness of Sun & Beach Tourism

Description and Projects	Time frame
<p>The sub-program of the operational marketing development for Sun & Beach tourism includes the development of commercial brands for Belize's beaches to target the sun & beach market segments which will be operated and communicated by BTB and BTB's sun and beach tourism product manager and by the local tourism operators. In addition to the branding, marketing, promotion and communication tasks, BTB will strengthen the product's development by creating specific awareness and information campaigns for the private and civil sector.</p> <ul style="list-style-type: none"> ▶ Project 1. Belizean Sun and Beach Tourism Brand. The brand commercializes the Belize's Beaches highlighting especially those accredited by an international classification system. Further this umbrella brand will provide the opportunity to develop sub-brands, e.g. for the Blue Flag beaches, family beaches, honey moon beaches, etc. This project is aligned with the Belize Tourism Brand development. <ul style="list-style-type: none"> • Development of commercial brands for selected beaches and the sun & beach tourism destinations. ▶ Project 2. Sun & Beach Tourism product clubs. Establishment of the Sun & Beach tourism clubs to structure the product for different market segments. E.g. conventional sun & beach tourism, luxury sun & beach tourism, family sun & beach tourism, etc. This project is coordinated with the marketing manual for tourism product clubs development. ▶ Project 3. Promotion, communication & PR. <ul style="list-style-type: none"> • Development of a specific Sun & Beach Tourism web-page on BTB's web-site • Development of marketing collaterals (such as street banners, sales brochures and other printed product information. The promotion of sun and beach tourism should be complemented by attractive, nature-based or cultural day activities. • Development of visual aids used in sales presentations, web content, sales guides, etc. • Development of an annual marketing plan including FAM trips, workshops, road shows, media usage, publishing, direct marketing and others for the targeted markets and segments. • Development of marketing kits and promotional items and giveaways. • Participation in sun & beach tourism fairs • Advertising in magazines, e.g.: <ol style="list-style-type: none"> USA: Caribbean Travel & Life, Destination Weddings & Honeymoons Europe: Reisen - aktuell (GER), National Geographic Travel (UK) 	<p>Project 1: Starting date: 2014 Implementation: 1 year</p> <p>Project 2: Starting date: 2021 Duration: continuous</p> <p>Project 3: Starting date: 2015 Duration: continuous</p> <p>Project 4: Starting date: 2015 Duration: continuous</p>

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1.3.3 Sub-program for Marketing and Awareness of Sun & Beach Tourism

<ul style="list-style-type: none"> Advertising on websites, e.g.: <ul style="list-style-type: none"> i. USA: www.familiesonlinemagazine.com, www.getawaytoday.com ii. Canada: www.travelandleisure.com iii. Europe: www.guardian.co.uk (UK) ▶ Project 4. Product specific awareness development. Development of awareness programs and campaigns for stakeholders considering specific risks related to the development of Sun & Beach Tourism. <ul style="list-style-type: none"> Development of awareness campaign to educate stakeholders on feasible practices to mitigate the beaches degradation and enhance the quality of waters, the reef and eco-systems; i.e. "Adopt a Beach" program to alleviate the degradation of Belize's Beaches, encouraging local businesses, schools and community groups to preserve the beaches and the reefs. Development of awareness campaigns for citizens to raise awareness on the importance and significance of the development of Sun & Beach Tourism, including possible activities for participation and benefit from the economic activities. To involve and improve community attitudes towards sun & beach tourism, especially environmentalists and conservationists 	
Lead Responsible	Strategic Partners
BTB (product management)	BTIA Tourism Incoming Agencies Tourist Information Centers / Welcome Centers Protected Areas Conservation Trust (PACT) Belize National Tour Operators Association Belize Hotel Association Private businesses/operators of the sun & beach areas
Destinations for implementation	
South Eastern Coast Belize, Northern Islands, Southern Belize, Belize Reef	
Estimated cost (USD)	Potential financing sources
USD 15,760,000	BTB Local NGOs Multilateral donors Public funds

1.3.4 Sub-program for Standards and Safety & Security Assurance of Sun & Beach Tourism

Description and Projects	Time frame
<p>The sub-program for the safety and security development of Sun & Beach tourism focuses on operational guidelines to prevent incidents and the development of negative impacts of sun & beach tourism. It consists of developing strategies, laws, law enforcement and preventive/reactive mechanisms to enhance visitors' safety, security and their experience.</p> <p>▶ Project 1. Operation guidelines and standards for Sun & Beach Tourism. This project will structure the sun & beach tourism product into an integrated system of operational safety and security standards and guidelines.</p> <ul style="list-style-type: none"> Development of Code of Conducts and Best Practice Manuals for visitors, tourists, employees and residents, providing guidelines, law excerpts and fines imposed for disrespectful interaction with sensitive areas such as the beach preservation and conservation to develop appropriate behavior at the sun and beach tourism sites Operational guidelines for the area's maintenance, aimed at the area's commercial operators and professional services agencies/companies Pristine Beach Management Plan required from each beach owner in order 	<p>Project 1: Starting date: 2015 Implementation: 2 years, and from 2020-2021, (1 year per destination) Total: 4 years</p> <p>Project 2: Starting date: 2015 Duration: continuous</p>

1.3.4 Sub-program for Standards and Safety & Security Assurance of Sun & Beach Tourism

<p>to obtain the operational licensing. In this plan the owner will have to apply to the specific beach-land-use guidelines and identify his beach business model. Furthermore, the beach owner will develop his own Reef Water Quality Protection Plan and provide insights on his planned activities to preserve the water quality.</p> <ul style="list-style-type: none"> • Aim of each beach owner should be to voluntarily certificate his beach as a Blue Flag Beach. <p>► Project 2. Safety & security for sun & beach tourism. Development of specific emergency management plans to reduce the potential harm/damage caused by crises.</p> <ul style="list-style-type: none"> • Police stations in the area and services offered by the Tourism Police Unit to assist tourists requiring help and assistance. Especially in large tourism hubs, a specialist tourist police force should be introduced to secure an enhanced tourist experience and maintain a positive destination image: free of harassment, petty thieves and crimes. • Development of tourism-specific laws and strong law enforcement associated with armed robberies, petty thieves, drug, prostitution, human trafficking, tourism harassment and scamming at sun & beach sites. • Development of specific risk management plans for sun & beach tourism destinations and tourism operators, including incidents resulting from flooding, hurricanes, fires, and other emergencies that could occur at the specific destinations; • Development of emergency response/evacuation plans for well-communicated but also for remote areas of the sun & beach destinations. • Development of facilities providing first aid and health assistance in the vicinity of the sun & beach destinations such as water-sports injuries or injuries caused by sea animals. • Development of a Reef Water Quality Protection Plan including enhanced activity along the beaches and in Belize's waters. • Development of a search and rescue mechanism and task team force prepared to respond to product specific emergency rescue missions, such as search for lost kayak driver, lost swimmer, etc. <p>► Project 3. Integrated Quality Management system. Development of best practice guidelines for sun & beach tourism operators for a voluntary adhesion to the national IQM system.</p>		<p>Project 3: Starting date: 2022 Implementation: 2 year per destination plan, then continuous</p>
Lead Responsible	Strategic Partners	
BTB (product development) Ministry of Tourism	Ministry of Fisheries (Ecosystems Management Unit) Ministry of Police and Public Safety BTIA Local Municipalities NEMO Ministry of Works	
Destinations for implementation		
South Eastern Coast Belize, Northern Islands, Southern Belize, Belize Reef		
Estimated cost (USD)	Potential financing sources	
USD 3,460,000	Local Municipalities Ministry of Police and Public Safety BTB - Licensing fees Multilateral donors	

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1.3.5 Sub-program for Capacity Building of Sun & Beach Tourism

Description and Projects		Time frame
<p>The sub-program for the development of capacity building modules and trainings for stakeholders involved in the tourism activities (or tourism related activities) of the sun and beach tourism product include in-house trainings or demand-driven training modules at national training institutions that should integrate self-financing mechanisms.</p> <p>➤ Project 1: Continuous training for Sun & Beach tourism operations. Development of different tourism product related training programs required by the operational and management staff of sun & beach destinations to enhance the staff's skills and performance and hence to enhance the customer's experience at the destination.</p> <ul style="list-style-type: none">• Tourism and hospitality training: waiters, cooks, reception, housekeeping, maintenance, guest relations, service personnel, bar tender, etc.• Guide training for tour escorts and tour guides, bus drivers• Specific skills required to attend sun & beach tourism services• Sales and promotion techniques for hotel managers and reservations staff• Language courses, especially when targeting European visitors such as English, German, French and Spanish.• First Aid and lifeguard training• Develop capacity modules for law enforcement for police officers and security guards, specific training for conflict situations related to drug dealers, burglars, petty thieves, prostitutes and beggars.		<p>Project 1: Starting date: 2015 Duration: continuous</p>
Lead Responsible	Strategic Partners	
BTB (product development)	BTB (quality development) Beltraide – Ministry of Economic Development BTIA Belize National Tour Operator Association Private businesses/operators of the sun & beach areas BHA National training institutions (universities, vocational training centers, etc.)	
Destinations for implementation		
South Eastern Coast Belize, Northern Islands, Southern Belize, Belize Reef		
Estimated cost (USD)	Potential financing sources	
USD 3,900,000	Student Fees (employees, citizens, private sector) Private businesses/operators of the sun & beach areas Multilateral donors	

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1.3.6 Sub-program for Sustainability of Sun & Beach Tourism

Description and Projects	Time frame
<p>The sub-program for long-term sustainability in Sun & Beach Tourism development designs mechanisms to assure that the social safeguards and the land/ecosystem's protection, conservation and economic development requirements are met.</p> <ul style="list-style-type: none"> ▶ Project 1. Beach destinations and sites land use plan. In order to enhance the sustainability of the sun & beach destination, planning requires taking environmental and social aspects into consideration. To do this, the NSTTF in co-operation with the land use policy provides support in master-planning the land and environmental feasibility studies of the defined sun & beach destinations and specific sites for development. <ul style="list-style-type: none"> • Defined sites will require the development of master plans with destination components, building densities, architectural limitations and minimum requirements adapted to each region, the determination of the beaches which should remain public and those which should be private, and an investment plan for the destination. • Hence, planning for the areas should identify the most appropriate land plots of development and rank them by level of priority and potential for reducing environmental and social impacts. • Assessment and development of environmental and social safeguards in each tourism site in order to reduce negative impacts resulting from increased tourism activity. • Development of a sun & beach destinations land use plan setting all definitions and product related safeguarding regulations, limitations and important data for future developments. • Development of conservation mechanisms and beach conservation laws, monitoring system and law enforcement ▶ Project 2. Sun & beach asset management and conservation. The project defines sustainable tourism safeguards and monitoring systems that should be considered when developing sun & beach tourism destinations. Hence, it requires: <ul style="list-style-type: none"> • Identification and assessment of the vulnerability of sun & beach tourism resources. • The development of <i>indicators, responsibilities and roles for monitoring, reporting and communication processes</i> to create a set of <i>offensive and defensive strategies</i>, which will help to maintain sustainable and structured development of the tourism product. • Annual monitoring and evaluation of impacts of the sun & beach ▶ Project 3. Sun & beach tourism inclusion mechanisms. Identification and activation of mechanisms adapted for the Belize destinations' reality to reduce poverty through Sun & Beach Tourism, to involve communities and by supporting their economic initiatives, providing employment and micro-enterprise opportunities, or to become suppliers to the sun & beach tourism industry. Some inclusion mechanisms could be the ones from UNWTO. 	<p>Project 1: Starting date: 2012 Implementation: 1 year for South Eastern Coast Belize Implementation: 6 months for Northern Islands Duration: 1 year for Southern Belize Implementation: 6 months for Belize Reef Total: 5 years</p> <p>Project 2: Starting date: 2015 Duration: continuous</p> <p>Project 3: Starting date: 2014 Duration: continuous</p>
Lead Responsible	Strategic Partners
BTB (product development) NSTTF	Ministry of Fisheries (Ecosystems Management Unit) Ministry of Natural Resources and the Environment Ministry of Economic Development Healthy Reef Coastal Zone Management – Authority & Institute Local municipalities Local NGOs Friends of Conservation and Development PACT Universities and scholars
Destinations for implementation	

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1.3.6 Sub-program for Sustainability of Sun & Beach Tourism

South Eastern Coast Belize, Northern Islands, Southern Belize, Belize Reef

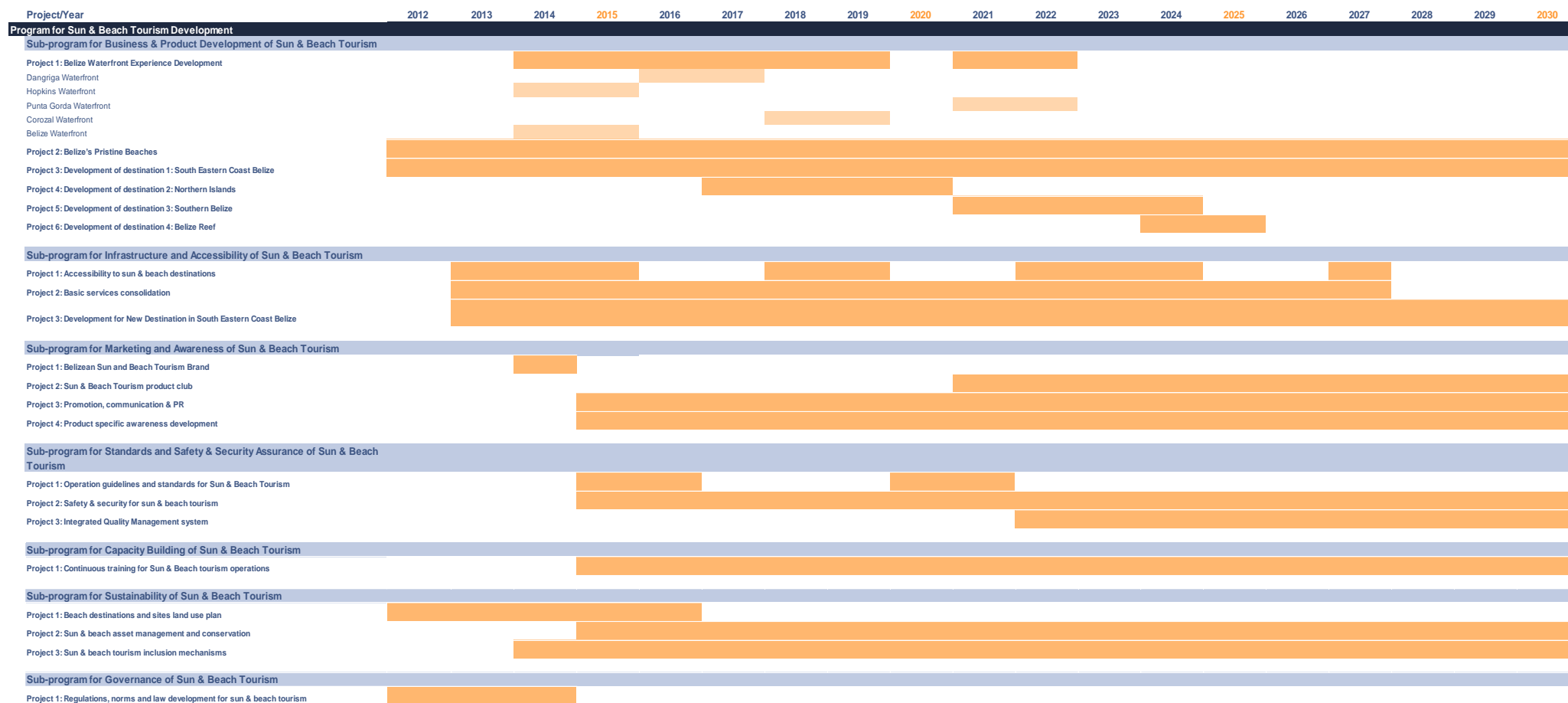
Estimated cost (USD)	Potential financing sources
USD 4,820,000	NSTTF Ministry of Natural Resources and the Environment Local NGOs PACT Other public funds

1.3.7 Sub-program for Governance of Sun & Beach Tourism

Description and Projects	Time frame
<p>The sub-program for the legislation framework of sun & beach focuses on the amendments or the creation of new legislative regulations and regulatory frameworks that govern the safety and sustainability of Belize's sun & beach tourism destinations.</p> <p>► Project 1. Regulations, norms and law development for sun & beach tourism. This project amends existing Acts or develops new regulative frameworks to incorporate product-specific laws for each component of the sun & beach tourism value chain aiming at enhancing and improving the product's offer and the area and destinations where it takes place. Hence the act could include regulatory articles on areas such as:</p> <ul style="list-style-type: none"> Land use categories and standards, building and urbanization criteria Development of conservation and protection mechanisms and monitoring system, including beach conservation laws and law enforcement. Development of tourism-specific laws and strong law enforcement associated with armed robberies, petty thieves, drug, prostitution, human trafficking, tourism harassment and scamming at sun & beach sites and tourism destination Develop regulations and law enforcement to ensure safety on the beach, including regulations for merchants, petty thieves, etc. Develop strict Risk Management and Emergency Plans for disaster prone areas (e.g. hurricanes, flooding, wild fires, etc.) Create a national system of lifeguard and beach vigilance Develop strict construction permissions and prohibit the creation of artificial beaches, and restricting filling or dredging of beaches. Provide strong surveillance and protection of natural beaches Protect identified fragile ecosystems and encouraging only natural beaches to function as sun & beach areas 	<p>Project 1: Starting date: 2012 Implementation: 3 years</p>
Lead Responsible	Strategic Partners
BTB (product development)	Ministry of Fisheries (Ecosystems Management Unit) Ministry of Tourism Ministry of Police and Public Safety Operators of the sun & beach destinations Local Municipalities Universities and scholars
Destinations for implementation	
South Eastern Coast Belize, Northern Islands, Southern Belize, Belize Reef	
Estimated cost (USD)	Potential financing sources
USD 250.000	Ministry of Tourism Ministry of Police and Public Safety Local Municipalities

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1.3.8 Sun and Beach Tourism Development Program Implementation Schedule



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1.3.9 Sun and Beach Tourism Development Program Cost Model

Sun & Beach Tourism Product Budget

Project/Year	Total (US\$)	2012	2013	2014	2015	2016	2017	2018	2019	2020
Program for Sun & Beach Tourism Development	219,990,000	1,750,000	4,425,000	5,500,000	8,105,000	9,130,000	14,460,000	16,390,000	14,890,000	14,030,000
Sub-program for Business & Product Development of Sun & Beach Tourism	76,100,000	800,000	800,000	1,000,000	1,400,000	2,650,000	3,950,000	5,400,000	5,900,000	4,400,000
Project 1: Belize Waterfront Experience Development	15,500,000					1,250,000	1,250,000	1,500,000	1,500,000	
Project 2: Belize's Pristine Beaches	5,400,000				400,000	400,000	400,000	400,000	400,000	400,000
Project 3: Development of destination 1: South Eastern Coast Belize	38,600,000	800,000	800,000	1,000,000	1,000,000	1,000,000	1,500,000	1,500,000	2,000,000	2,000,000
Project 4: Development of destination 2: Northern Islands	6,800,000						800,000	2,000,000	2,000,000	2,000,000
Project 5: Development of destination 3: Southern Belize	6,800,000									
Project 6: Development of destination 4: Belize Reef	3,000,000									
Sub-program for Infrastructure and Accessibility of Sun & Beach Tourism	115,700,000	400,000	3,300,000	3,900,000	5,100,000	5,100,000	9,500,000	10,000,000	8,100,000	8,600,000
Project 1: Accessibility to sun & beach destinations	40,000,000	400,000	800,000	1,000,000	1,000,000	1,000,000	4,900,000	4,900,000	3,000,000	2,500,000
Project 2: Basic services consolidation	43,000,000		2,100,000	2,100,000	3,100,000	3,100,000	3,600,000	3,600,000	3,600,000	3,600,000
Project 3: Infrastructure development for New Destination in South Eastern Coast Belize	32,700,000		400,000	800,000	1,000,000	1,000,000	1,000,000	1,500,000	1,500,000	2,500,000
Sub-program for Marketing and Awareness of Sun & Beach Tourism	15,760,000	-	-	50,000	380,000	380,000	380,000	360,000	360,000	350,000
Project 1: Belizean Sun and Beach Tourism Brand	50,000			50,000						
Project 2: Sun & Beach Tourism product club	5,000,000									
Project 3: Promotion, communication & PR	9,800,000				300,000	300,000	300,000	300,000	300,000	300,000
Project 4: Product specific awareness development	910,000				80,000	80,000	80,000	60,000	60,000	50,000
Sub-program for Standards and Safety & Security Assurance of Sun & Beach Tourism	3,460,000	-	-	-	450,000	350,000	300,000	300,000	200,000	350,000
Project 1: Operation guidelines and standards for Sun & Beach Tourism	400,000				150,000	50,000				150,000
Project 2: Safety & security for sun & beach tourism	2,700,000				300,000	300,000	300,000	300,000	200,000	200,000
Project 3: Integrated Quality Management system	360,000									
Sub-program for Capacity Building of Sun & Beach Tourism	3,900,000	-	-	-	150,000	150,000	150,000	150,000	150,000	150,000
Project 1: Continuous training for Sun & Beach tourism operations	3,900,000				150,000	150,000	150,000	150,000	150,000	150,000
Sub-program for Sustainability of Sun & Beach Tourism	4,820,000	400,000	275,000	500,000	625,000	500,000	180,000	180,000	180,000	180,000
Project 1: Beach destinations and sites land use plan	1,670,000	400,000	275,000	400,000	275,000	320,000				
Project 2: Sun & beach asset management and conservation	1,450,000				250,000	80,000	80,000	80,000	80,000	80,000
Project 3: Sun & beach tourism inclusion mechanisms	1,700,000			100,000	100,000	100,000	100,000	100,000	100,000	100,000
Sub-program for Governance of Sun & Beach Tourism	250,000	150,000	50,000	50,000	-	-	-	-	-	-
Project 1: Regulations, norms and law development for sun & beach tourism	250,000	150,000	50,000	50,000						
TOTAL BUDGET SUN & BEACH MACRO PROGRAM	219,990,000.00	1,750,000.00	4,425,000.00	5,500,000.00	8,105,000.00	9,130,000.00	14,460,000.00	16,390,000.00	14,890,000.00	14,030,000.00

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Sun & Beach Tourism Product Budget

Project/Year	Total (US\$)	2012	2013	2014	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Program for Sun & Beach Tourism Development	219,990,000	1,750,000	4,425,000	5,500,000	14,180,000	14,770,000	16,670,000	17,630,000	18,630,000	17,530,000	9,850,000	8,350,000	8,350,000	5,350,000
Sub-program for Business & Product Development of Sun & Beach Tourism	76,100,000	800,000	800,000	1,000,000	4,200,000	5,400,000	6,400,000	6,360,000	7,360,000	8,360,000	4,180,000	3,180,000	3,180,000	1,180,000
Project 1: Belize Waterfront Experience Development	15,500,000				1,000,000	1,000,000			2,000,000	2,000,000		2,000,000	2,000,000	
Project 2: Belize's Pristine Beaches	5,400,000				400,000	400,000	400,000	360,000	360,000	360,000	180,000	180,000	180,000	180,000
Project 3: Development of destination 1: South Eastern Coast Belize	38,600,000	800,000	800,000	1,000,000	2,000,000	2,000,000	4,000,000	4,000,000	4,000,000	4,000,000	4,000,000	1,000,000	1,000,000	1,000,000
Project 4: Development of destination 2: Northern Islands	6,800,000													
Project 5: Development of destination 3: Southern Belize	6,800,000				800,000	2,000,000	2,000,000	2,000,000						
Project 6: Development of destination 4: Belize Reef	3,000,000								1,000,000	2,000,000				
Sub-program for Infrastructure and Accessibility of Sun & Beach Tourism	115,700,000	400,000	3,300,000	3,900,000	8,100,000	7,600,000	8,500,000	9,500,000	9,500,000	7,000,000	3,500,000	3,000,000	3,000,000	2,000,000
Project 1: Accessibility to sun & beach destinations	40,000,000	400,000	800,000	1,000,000	2,000,000	2,000,000	4,000,000	4,000,000	4,000,000	1,500,000	1,000,000	1,000,000	1,000,000	
Project 2: Basic services consolidation	43,000,000		2,100,000	2,100,000	3,600,000	3,600,000	2,500,000	1,500,000	1,500,000	1,500,000	1,000,000	1,000,000	1,000,000	1,000,000
Project 3: Infrastructure development for New Destination in South Eastern Coast Belize	32,700,000		400,000	800,000	2,500,000	2,000,000	2,000,000	4,000,000	4,000,000	4,000,000	1,500,000	1,000,000	1,000,000	1,000,000
Sub-program for Marketing and Awareness of Sun & Beach Tourism	15,760,000	-	-	50,000	1,150,000	1,150,000	1,150,000	1,150,000	1,150,000	1,550,000	1,550,000	1,550,000	1,550,000	1,550,000
Project 1: Belizean Sun and Beach Tourism Brand	50,000			50,000										
Project 2: Sun & Beach Tourism product club	5,000,000				500,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000
Project 3: Promotion, communication & PR	9,800,000				600,000	600,000	600,000	600,000	600,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
Project 4: Product specific awareness development	910,000				50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000
Sub-program for Standards and Safety & Security Assurance of Sun & Beach Tourism	3,460,000	-	-	-	250,000	140,000	140,000	140,000	140,000	140,000	140,000	140,000	140,000	140,000
Project 1: Operation guidelines and standards for Sun & Beach Tourism	400,000				50,000									
Project 2: Safety & security for sun & beach tourism	2,700,000				200,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
Project 3: Integrated Quality Management system	360,000					40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000
Sub-program for Capacity Building of Sun & Beach Tourism	3,900,000	-	-	-	300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000
Project 1: Continuous training for Sun & Beach tourism operations	3,900,000				300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000
Sub-program for Sustainability of Sun & Beach Tourism	4,820,000	400,000	275,000	500,000	180,000	180,000	180,000	180,000	180,000	180,000	180,000	180,000	180,000	180,000
Project 1: Beach destinations and sites land use plan	1,610,000	400,000	275,000	400,000										
Project 2: Sun & beach asset management and conservation	1,450,000				80,000	80,000	80,000	80,000	80,000	80,000	80,000	80,000	80,000	80,000
Project 3: Sun & beach tourism inclusion mechanisms	1,760,000			100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
Sub-program for Governance of Sun & Beach Tourism	250,000	150,000	50,000	50,000	-	-	-	-	-	-	-	-	-	-
Project 1: Regulations, norms and law development for sun & beach tourism	250,000	150,000	50,000	50,000										
TOTAL BUDGET SUN & BEACH MACRO PROGRAM	219,990,000.00	1,750,000.00	4,425,000.00	5,500,000.00	14,180,000.00	14,770,000.00	16,670,000.00	17,630,000.00	18,630,000.00	17,530,000.00	9,850,000.00	8,350,000.00	8,350,000.00	5,350,000.00

1.4 Program for Cruise Tourism Development

Product Concept

There are two different types of cruise tourists: conventional and pocket cruises.

- ▶ **Conventional cruise**, large cruise ships are the most popular and common type of cruise lines. These ships cater for 850 to 3,000 passengers. They are commonly referred to as floating resorts because of the various amenities and services. Most of them offer restaurants, arcades and shopping facilities. Casinos, evening entertainment shows, libraries, and spas are also fairly standard features of mainstream cruise vessels.
- ▶ **Pocket cruise**, attracting small cruise ships for less than 250 passengers. The idea is to maintain the same level of amenities found with the traditional size of cruise ships, but offering the passengers a more intimate atmosphere and cruise experience. Generally the cabins are large and well furnished, providing the cruise passenger with a high level of comfort.

Gaps identified – Diagnostic

Cruise Tourism is a crucial issue for the development and management of Belize's sustainable tourism Master Plan, especially when addressing the challenge of minimizing negative impacts on different attractions and managing to set a balance between overnight and cruise visitors.

- ▶ Belize cruise visitors are undertaking day-visits to major tourism attractions in Central Belize, therefore the same attractions (marine and inland) are exposed on a daily basis to serious environmental and social negative impacts through the mass tourism activity caused by cruises.
- ▶ The impact of cruise tourism on Belize's eco-tourism and cultural sites, which is gradually changing the characteristics of visits to popular cruise tourism sites from eco-tourism/cultural experiences into mass tourism experiences.
- ▶ Non-existent model for cruise tourism and unclear policy on regulations and considerations the Cruise Tourism industry should be basing their activity on.

Vision Cruise Tourism 2030

Cruise tourism is currently one of the most present tourism products in Belize. By 2030, the two products (conventional cruise and pocket cruise) will form the product portfolio of cruise tourism. Conventional Cruise will have been re-launched with its new form and pocket-cruise tourism will have to be maintained sustainably after its maturity. The main cruise hubs (especially Fort George and Port Loyola in Belize City) and the cruise tourism destinations will have been developed and restructured into an attractive system of services, attractions and entertainment facilities that foster the generation of new and expanded tourism flows throughout the tourism hubs and destinations to cater to international tourist expectations.

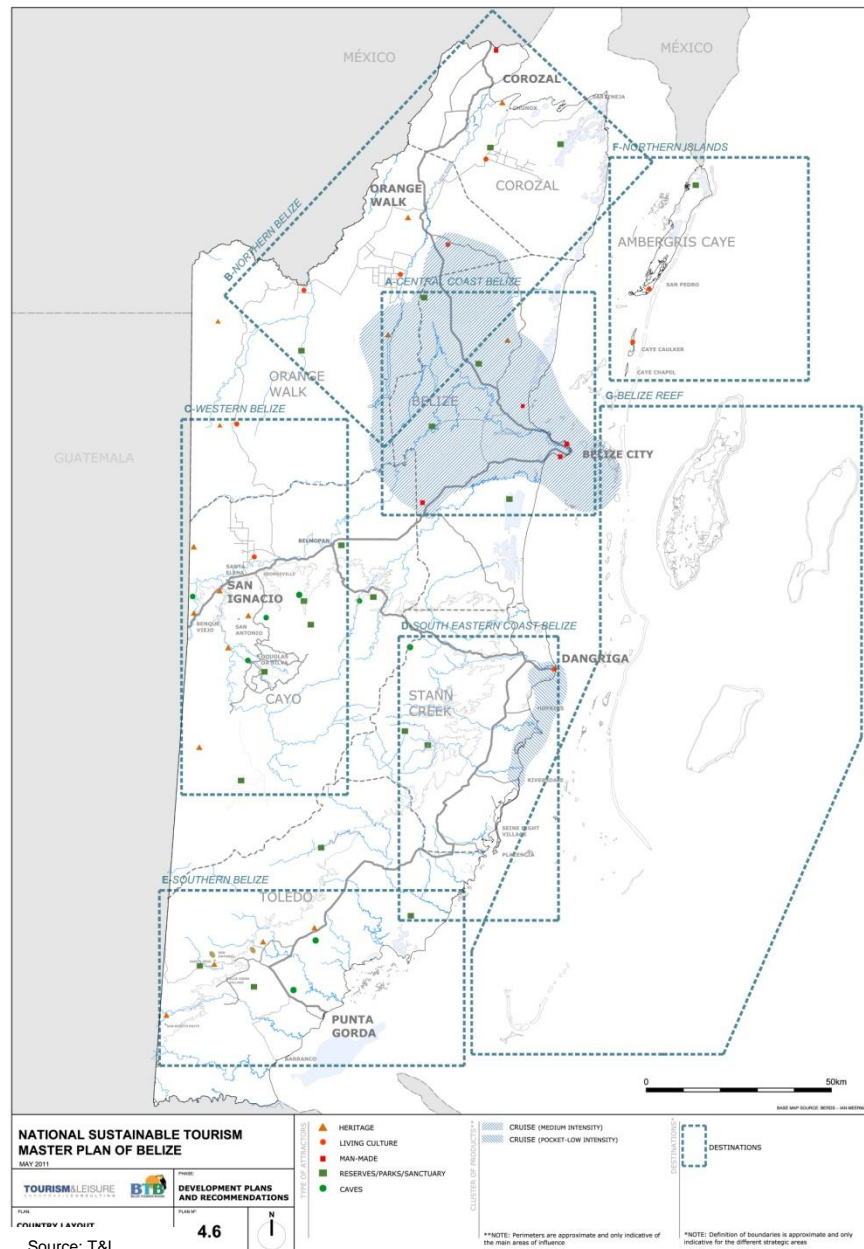
Cruise tourism destinations will manage their resources and visitors in order to prevent any kind of negative impacts and deterioration.

Cruise tourism destinations and product development

As can be identified from the map below, Cruise Tourism is a tourism product that will focus on two areas of Belize. Based on the current and potential competitiveness, importance and attractiveness, Cruise Tourism will remain a main tourism product in Central Coast Belize and Northern Belize and hence act as a main tourist attractor to these destinations. As cruise tourism is expected to grow in Belize, Port Loyola in Belize City is scheduled to be developed and to cater for any further cruise passengers that cannot be covered by Fort George Port. In South

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Eastern Coast Belize, Cruise Tourism in the pocket cruise format will be regarded as a secondary tourism product.



In **South Eastern Coast Belize's** (Riversdale) pocket cruise tourism will be developed on the premise of sustainability, and the access infrastructure, the anchorage possibilities, and the tourism capacities will be evaluated on their environmental impact. Furthermore, the new pocket cruise port will be structured into an integral development including land infrastructure, support services and infrastructure for cruise ships and visitors.

To cater for cruise tourism, **Central Coast Belize** (Belize City) will undergo great urban changes and remodeling will be carried out in the Fort George street village area and the wider area of the terminal; there will be a new entertainment area including three waterfront experiences (in the area of Princess Hotel, in the area of Baron Bliss light house and in the Port Loyola area), as well as the embellishment of Belize River and its surrounding houses and renovated bridges to

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further access southern parts of the city. Furthermore, Belize City will develop Port Loyola as a functional and modern cruise terminal to be structured as Belize City's main cruise port.

Northern Belize will develop its cruise tourism attractions, services and infrastructures at specific sites in order to enhance its carrying capacities and to cater for the quantity of cruise passengers arriving to the destinations.

As described above, the graph below illustrates the product development phases by destination:

		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
South Eastern Coast	Cruise																				
Central Coast Belize	Cruise																				
Northern Belize	Cruise																				

Description of the program

The Cruise Tourism Development Program will develop the tourism product as conventional cruise tourism in Central Coast Belize (CCB) and the pocket cruise tourism product in New Development area north of Riversdale in South Eastern Coast Belize (SECB). Furthermore, the program develops the infrastructures at dedicated cruise tourism destinations, sites, attractions and activities in order to cater for tourism crowds (such as in Northern Belize – Lamanai and Altun Ha).

The Program for Cruise Tourism Development develops three projects for the business & product development, namely:

- ▶ **Belize City Main Cruise Hub Development** which will enhance the urban zoning of Belize City by restoring and embellishing the city area, and will develop services and facilities to enhance the visitor experience at the destination.
- ▶ **New Development area north of Riversdale Pocket Cruise Development** develops an integral development of the cruise port including services and facilities for small cruise vessels and supporting tourism and leisure services and infrastructures for visitors.
- ▶ **Belize Cruise Negotiation and Destination Management Committee** will manage the cruise destination and act as a negotiator for international cruise companies to enhance the benefits from the cruise tourism industry.

Lead stakeholders

The most important and leading responsible bodies for the development of the Cruise Tourism Development Program will be BTB and its cruise tourism product manager, NSTTF and Belize's Port Authorities. One of their most significant tasks is the assurance of the product's sustainability and emphasis on the mitigation of potential risks that could result in the degradation of cruise tourism destinations, social conflicts, or any other negative impacts caused by the tourism product.

Objectives

The Belize 2030 objectives of the Cruise Tourism Development Program are:

- ▶ To attract new markets and market segments and increase the number of overnights spent at Belize's cruise tourism destinations by diversifying Belize's cruise tourism product and service portfolio by catering to the needs of conventional cruise lines and pocket cruise lines.
- ▶ Enhance visitor satisfaction by improving the cruise tourism destinations and enhancing the accessibility to existing and new destinations in order to further distribute cruise passengers

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throughout the country and to reduce tourism sites/asset overcrowding; as well, to enhance the safety and security conditions, and give training to personnel employed by the cruise tourism industry.

- ▶ To enhance the satisfaction level at both local (civil, private sector) and foreign (tourists and international cruise companies) levels with the safety measures, tourism services and product offered.
- ▶ To increase local participation and reduce poverty by using cruise tourism as a pro-poor tourism tool and implementing pro-poor participation mechanisms.

Milestones

Review Years	Milestones
2015	<ul style="list-style-type: none"> ▶ First phase of basic service consolidation and ship service development ▶ Development of the operation guidelines for the Central Coast Belize and South Eastern Coast Belize ▶ Creation of the safety and security manuals for Central Coast Belize and South Eastern Coast Belize ▶ Implementation of the cruise tourism area use plan ▶ Definition of the cruise tourism asset management and conservation system ▶ Development of the cruise inclusion mechanisms ▶ Creation of a legal structure and cruise entities ▶ Launch of the PR, communication campaign and cruise specific awareness program ▶ Implementation of the continuous cruise ship service training and cruise tourism services on land
2020	▶ New Development area north of Riversdale (Riversdale) Pocket Cruise Development
2025	▶ Launch of the cruise product club
2030	▶ All project in progress

Proposed subprograms and projects

1.4.1 Sub-program for Business & Product Development of Cruise Tourism	
Description and Projects	Time frame
<p>The sub-program enhances the urban zoning of Belize City in favor of cruise tourism and results in a restoration and embellishment for wider distribution of tourism streams in the city. It structures the development of the pocket cruise tourism product in South Eastern Coast Belize. It aims is to structure cruise tourism as attractive and successful tourism product for foreign and domestic markets.</p> <ul style="list-style-type: none"> ▶ Project 1: Belize City Main Cruise Hub Development. This project improves and develops Belize City's cruise area as a structured destination to receive, manage, distribute and attend cruise visitors better. The development consists of an urban intervention including urban zoning, regulations, operations and logistics planning, the development of regulations and operational guidelines and their enforcement, social intervention to prevent criminality, urban transformation, tourism entrepreneurship incentives; etc. Some tasks are: <ul style="list-style-type: none"> • Development of an interactive a tourism information center/welcome center introducing Belize as tourism destination and providing information to both, cruise passenger and conventional tourists (FIT's), where they can obtain first impressions on Belizean experiences, information on the possible sites 	<p>Project 1: Starting date: 2012 Implementation: 11 years</p> <p>Project 2: Starting date: 2015 Implementation: 4 years</p>

1.4.1 Sub-program for Business & Product Development of Cruise Tourism

and itineraries they can undertake. In addition, this tourist information center/welcome center can present the cruise passengers with images and impressions on what they haven't seen from Belize and hence stimulate the wish to return to Belize.

- Development of Belize City' Waterfront Experience (mentioned in *Sub-program 1.3.2, Project 1*) as leisure and relaxation area on Belize City Peninsula including tourism and leisure service facilities such as restaurants, shopping possibilities along the waterfront experience.
- Belize's city traditional neighborhoods transformation in order to make Belize City a walk able, safe, interesting and entertaining destination. Therefore it is suggested to develop pedestrian areas including themed routes, waterfront promenade, parking areas, green park zones, refreshment and F&B, accommodation, interpretation centre and tour guides, site museum, souvenir shops, support services, others.
- Restoration of Belize River and its channels to be able to utilize it as attractive means of transportation and way of experiencing Belize City. Renovation of housing and façade embellishment along Belize River
- Restoration of bridge and relaxation facilities including a waterfront promenade.

- ▶ **Project 2: New Development area north of Riversdale Pocket Cruise Development.** This project develops Riversdale's Pocket Cruise Terminal for small cruise vessels (of maximum 300 passengers) and the supporting tourism and leisure services and infrastructures for the destination, as stated in *Sub-program 1.4.2. Sub-program for Infrastructure and Accessibility, Project 4: Ship services development*.

However, in order to do so, the development of New Development area north of Riversdale (Riversdale)'s Pocket Cruise requires careful planning and structuring of the area. This development phase will require:

- A **market and feasibility study** providing information on the potential market segments that will be targeted and hence how the products will be conceptualized and offered.
- The **business model development** based on the potential demand:
 - i. Concept, (high quality and luxury shopping opportunities, restaurants, cultural activities, adventure and ecotourism activities, accommodation - boutique and exclusive hotels/sun & beach resorts-).
 - ii. Assessment of amount of boat characteristics (length and beam), mixed use, etc.
 - iii. Assessment of the maximum capacity that is able to disembark at the destination
- **Environmental studies and for small boat access: A technical feasibility and land planning study** to confirm the better place for it; to master plan the destination including all its different tourism services and activities and its basic services and infrastructures (such as land plots dedicated to the retail shopping area/restaurants/roads/entertainment area/commercial centers, etc.). Followed by the execution of construction and the operational phase.
- Development of **Offering Memorandums** in order to inform potential investors on the investment possibilities at the marinas and state the objectives, business opportunities and terms of investment. Investor/Operator research (or search for international brands or retailers) and negotiations. Negotiation and contracting of developers and operators.
- Specific **laws and regulation** according to Belize's land policy and operational guidelines.

- ▶ **Project 3. Belize Cruise Negotiation and Destination Management Committee.** This project strengthens the public-private committee to manage the cruise destination and negotiate with any cruise line that wants to disembark in Belize City Cruise Hub or in Riverdale's Pocket Cruise Terminal. This project intends to support governance of the product manager and the connectivity committee. Issues involved in negotiations include:

Project 3:
Starting date: 2015
Duration: continuous

Project 4:
Starting date: 2019
Duration: 4 years

1.4.1 Sub-program for Business & Product Development of Cruise Tourism

<ul style="list-style-type: none"> i. Disembarking and embarking taxes, ii. Waste disposal taxes and services iii. Logistics (food supplies and passenger's luggage) iv. Immigration and customs v. Taxis and bus services vi. Ship maintenance services vii. Water supply viii. Communications and telephone services ix. Passenger services, etc. x. Obligations and conditions to operate in Belize. <p>► Project 4. Development of Port Loyola Cruise Village area. On a demand driven basis, construction and arrangement of a cruise port arrival and departure area adjacent or next to the new terminal building. The goal is to have an entry gate organizing tourism flows and offering services and products to tourists complementing the facilities on the cruise terminal with information, tours, traveling & rentals, national products, bars & restaurant, etc. Should thus include all kinds of visitor services and linkages to surrounding areas.</p>	
Lead Responsible	Strategic Partners
BTB (product development) NSTTP Belize Cruise Industry Association Belize Cruise Negotiation and Destination Management Commission	Beltraide, Ministry of Economic Development Belize City Council Ministry of Works Ministry of Housing and Urban Development
Destinations for implementation	
Central Coast Belize, South Eastern Coast Belize	
Estimated cost (USD)	Potential financing sources
USD 32,200,000	Ministry of Works NSTTP Ministry of Economic Development Private investors

1.4.2 Sub-program for Infrastructure and Accessibility of Cruise Tourism

Description and Projects	Time frame
<p>The sub-program for the infrastructure development of Cruise Tourism destinations will include different improved and enhanced quality of access possibilities for boats and passengers arriving to Belize's cruise terminals. In addition, the sub-program develops the on-land infrastructure at the cruise terminal and at the cruise tourism destinations to ensure catering larger groups and hence amplifies the tourist's experience in Belize.</p> <p>► Project 1. Ships and boats accessibility for Cruise Tourism. This project develops the access infrastructure to Belize's main cruise ports, anchorage points and enhances the embarking and disembarking services for visitors.</p> <ul style="list-style-type: none"> • Assessment of designated anchorage sites adequate for the cruise industry, South Eastern Coast Belize for pocket cruisers. Development of anchorage sites conditions regarding e.g. vessel sizes, speed, etc. in order not to harm the fragile coral reef and the marine wildlife. • Development of regulations for each of docking facility including which types of boats can be berthed at each site depending on the sea/sand level. Preference should be given to sites that can be used without changing their natural conditions and hence do not require dredging. 	<p>Project 1 in CCB: Starting date: 2012 Implementation: 2 years</p> <p>Project 1 in SECB: Starting date: 2014 Implementation: 2 years Total: 4 years</p> <p>Project 2 in CCB: Starting date: 2012 Implementation: 4 years</p>

1.4.2 Sub-program for Infrastructure and Accessibility of Cruise Tourism

In case that pocket cruise yachts might not be able to dock at the pocket cruise terminal, they will require tender boat services. The local tender boat association should be established and should be strengthened to obtain a strong negotiation power

- ▶ **Project 2. Land infrastructure for Cruise Tourism.** The project structures the land infrastructure of the destinations and assets visited by cruise passengers, mostly in Central Coast Belize, Northern Belize and South Eastern Coast Belize. The development of the sites will include:

- Urban infrastructure enhancement in Belize City
 - i. Development of urban infrastructure such as improvements on Haulover Bridge and High Street in order to stimulate cruise passenger flows to the Southern part of Belize City
 - ii. Develop further urban signage and city walking routes to enable tourists an individual stroll through the city
 - iii. Develop new and improve existing sidewalks in the City Center and assessing if some streets should be only pedestrian or partially pedestrian
- Development of improved road conditions and new roads in order to access further destinations e.g. Northern Highway to faster access Altun Ha, Crooked Tree Wildlife Sanctuary, the Rum Production Site and Western Highway to faster access San Ignacio and its surrounding cave systems and nature reserves and Mayan Temples.
- Development of infrastructure services at cruise tourism sites to meet the needs of larger crowds: large parking areas, toilets, bins, visitor's center/welcome centers, restaurants in the buffer areas or along the route, first aid-medical center facilities, shopping and souvenir spaces, police guard posts, signage on the sites, visitor's flows and logistics, etc.
- Development of signage at cruise terminal, cruise area and wider buffer zones.

- ▶ **Project 3. Basic services consolidation.** The project requires assessments of the required infrastructure services in order to cater to basic needs of a proper operation of the cruise tourism's destinations

- Ensure a functioning garbage collection management, waste treatment plants, at cruise tourism sites/assets and especially in Belize City
- Ensure a functioning sewage system for tourism sites/assets that receive cruise visitors in Belize City
- Provide sufficient drinking water supply at tourism sites with cruise passengers.
- Enhance the basic services for telecommunications and banking services according to the destination's needs

- ▶ **Project 4. Ships services development.** This project develops specific services which could be offered at cruise terminals in order to enhance the service portfolio of the destination. However, before being implemented the project requires an assessment on the latent demand and on the possible/feasible services that could be offered.

- Customer service survey assessing the needs of arriving cruise companies and enhancing the product by offering e.g. basic maintenance services and supplies such as electricity equipments and technicians, petrol and gas, waste discharging services, fuel docks, vacuum points (for waste water discharging), minor maintenance and services (electrical equipment and technicians), 24h security guards or surveillance, food and amenities supply/provisioning services, boat maintenance, dry storage and custody, boat ramps, transient dockage, repair shop and services, etc.
- Analysis of demand related to pocket cruise terminal in South Eastern Coast Belize (Riversdale Pocket Cruise Terminal) and it's suggested infrastructure and services required in order to operate as a turnaround port for pocket cruises.

Project 2 in SECB:
Starting date: 2014
Implementation: 5 years

Project 2 in NB:
Starting date: 2015
Implementation: 2 years
Total: 11 years

Project 3 in CCB:
Starting date: 2013
Implementation: 2 year

Project 3 in SECB:
Starting date: 2015
Implementation: 2 year

Project 3 in NB:
Starting date: 2016
Implementation: 2 years
Total: 5 years

Project 4 in CCB:
Starting date: 2013
Implementation: 1 year

Project 4 in SECB:
Starting date: 2015
Implementation: 2 years
Total: 3 years

Project 5:
Starting date: 2017
Duration: 4 year

1.4.2 Sub-program for Infrastructure and Accessibility of Cruise Tourism

- **Project 5. Development of Port Loyola Cruise Terminal.** Before current cruise port reaches maximum capacity, as it is foreseen, develop a second tourism cruise port at Port Loyola port for Belize City. The project studies and develops the access infrastructure to Port Loyola and provides the analysis and definition of the infrastructure needed for embarking and disembarking of visitors. Furthermore the infrastructure required to cater to the needs of large cruise ships could be further developed in the future.
- Construction of a new, functional and modern Cruise Terminal to replace the existing facilities around Fort George street area. The location has been already preliminarily established next to the logistic and industrial existing facilities being the sea depth sufficient to manage large cruise operations.
 - Detailed brief to be developed according to industry needs but should contain the Marine authority's area to manage the operations, other technical areas, lobby and gates, ticketing areas, lockers, parking area, bus staging area and taxis, lavatories, etc. Adjacent or next to the terminal building another action in this works plans the construction of a Cruise Village area to offer services and information to visitors.

Lead Responsible	Strategic Partners
BTB (product development) NSTTF Executive Cruise Tenders of Belize	Belize Port Authority Fort George Terminal Riversdale Pocket Cruise Terminal Ministry of Housing and Urban Development Ministry of Works Local Municipalities – Belize District, Corozal and Stann Creek Belize Cruise Industry Association
Destinations for implementation	
Central Coast Belize, Northern Belize, South Eastern Coast Belize	
Estimated cost (USD)	Potential financing sources
USD 41,970,000	NSTTF Ministry of Works, Ministry of Urban Development Private Investors

1.4.3 Sub-program for Marketing and Awareness of Cruise Tourism

Description and Projects	Time frame
<p>The sub-program of the operational marketing development for cruise tourism includes the development of a national Belize Cruise Negotiation's Commission that negotiates the conditions, taxes and services provided to the cruise liners from the cruise tourism industry and the involved stakeholders. The declinations includes marketing, promotion and communication possibilities dedicated for enhanced sales of Belize's cruise tourism products and mechanisms to increase the awareness of benefits resulting from cruise tourism.</p> <ul style="list-style-type: none"> ▶ Project 1. Belize Cruise Tourism Brands. Development of a Cruise Tourism umbrella brand in accordance with BTB's strategy and creating declinations using commercial group typologies to target specific lifestyle segments e.g. luxury, families, elderly, etc. Development of commercial brands for selected cruise tourism products. ▶ Project 2. Cruise Tourism product club. Establishment of the Cruise tourism clubs to structure the product for different market segments. E.g. conventional cruise tourism, luxury cruise tourism, pocket cruise tourism, etc. ▶ Project 3. Promotion, communication & PR. Development of marketing collaterals (such as sales brochures and other printed product information including sales presentations, web content). <ul style="list-style-type: none"> • Development of a sales guide targeting the already arriving cruise companies and new ones. • Development of an annual marketing plan including FAM trips, media usage, publishing, direct marketing and other measures aimed at the targeted markets and segments, especially focusing on US, UK and German Cruise Companies, and international pocket cruise liners. • Development of special marketing campaigns promoting Stay Over and Repeat Visits to Belize • Development of marketing kits and promotional items and giveaways • Possible marketing actions: <ol style="list-style-type: none"> i. Prior to the cruise: <p>Development of a cruise tourism specific website for cruise passenger providing information on the different destinations and attractions to be undertaken. The website could equally announcement that sites have a maximum capacity of visitors and promotes the purchase of entry tickets prior to departure and/or packages offering discounts cruise passengers and incentives for returning visitors. In addition the site could be used to inform cruise passengers on existing code of conducts and educate them about sustainability concerns.</p> ii. Provide information on tourism attractions and possible excursions at disembarking area: <p>Tourism Information Office, TV spot welcoming the passengers and informing them on the possible excursions, leaflets to be distributed before or upon arrival, sale of discounted last minute excursions</p> iii. Create campaigns and incentives to convert cruise travelers into stay-over tourists: <p>E.g. provide promotion video in the buses on the way back to the cruise terminal ("Belize, What you haven't seen" showing other destinations and tourism experience in Belize that stimulate the interest of cruise passengers to return to Belize).</p> • Participation in cruise tourism fairs, e.g.: <ol style="list-style-type: none"> i. USA: Seatrade Show – Miami, Seatrade Cruising Shipping Convention Annual Conference & Trade Show ii. Canada: Cruise-3-Sixty (Vancouver) 	<p>Project 1: Starting date: 2013 Duration: 1 year</p> <p>Project 2: Starting date: 2021 Duration: continuous</p> <p>Project 3: Starting date: 2012 Duration: continuous</p> <p>Project 4: Starting date: 2012 Duration: continuous</p>

1.4.3 Sub-program for Marketing and Awareness of Cruise Tourism

<ul style="list-style-type: none"> iii. Europe: Cruise & Ferry Conference (UK) <ul style="list-style-type: none"> • Advertising in magazines, e.g.: i. USA: Cruise Traveler Magazine, Porthole • Advertising on websites, e.g.: i. USA: Travel Summit Conference, Passport to profits Idea A-Thon, Leisure Travel / Winter Cruise A-Thon, Cruise A-Thon <p>► Project 4. Cruise specific awareness development. Development of awareness programs and campaigns for the purpose of mitigating specific risks related to the development of Cruise Tourism either for the tourism service providers (operators, guides, merchants) or for communities affected by cruise tourism.</p> <ul style="list-style-type: none"> • Development of awareness campaigns to educate stakeholders on feasible practices to mitigate degradation and enhance the quality of cruise tourism and its positive effects. • Education on tourism hospitality and how to be a “Belizean Host”. • Development of awareness campaigns to improve the communities’ attitude towards cruise tourism. 	
Lead Responsible	Strategic Partners
BTB (marketing) Belize Cruise Tourism Advisory Committee	Belize Port Authorities BTIA BHA Belize National Tour Operator Association Belize Tour Guide Association Friends of Conservation and Development Belize Cruise Industry Association
Destinations for implementation	
Central Coast Belize, Northern Belize, South Eastern Coast Belize	
Estimated cost (USD)	Potential financing sources
USD 9,520,000	BTB Belize Port Authorities Fort George Terminal Multilateral donors

1.4.4 Sub-program for Standards and Safety & Security Assurance of Cruise Tourism

Description and Projects	Time frame
<p>The sub-program for the safety and security development of Cruise Tourism focuses on operational guidelines to prevent incidents and the development of negative impacts of cruise tourism. It consists of developing strategies, laws, law enforcement and preventive/reactive mechanisms to enhance visitors' safety, security and their experience.</p> <ul style="list-style-type: none"> ▶ Project 1. Operational guidelines and standards for Cruise Tourism. Development of specific guidelines for businesses operating in the cruise sector (e.g. transportation services, tour operators, tour guides, merchants, food stall vendors, etc.). In order to be licensed operators, the services providers will have to submit their own Operations Plan which shows that they comply with the cruise tourism sites/assts code of conduct. <ul style="list-style-type: none"> • Development of Code of Conducts and Best Practice Manuals for cruise companies including clear statements on social involvement, on the information distribution to their passengers concerning the vulnerability of Belize's ecosystems, and recommendations on how to interact with Belize's nature: e.g. utilization of beaches, proper waste disposal, etc. • Develop quality and hygiene guidelines and standards applicable to the area's shopping stalls and vendors • Development of safety guidelines for tour operation logistics • Improved development of services for disembarking and embarking in order to enable simple land access to the different destinations. Including safety regulations and high quality vessels for tender boats • Assessment of all tasks related with ship security such as: <ul style="list-style-type: none"> i. Maintaining the compliance with the International Ship and Port Facility Security Code ISPS-2004 and applying new safety standards for cruise tourism ii. Development of support services for enhanced safety for special need-groups such as seniors, parents travelling with children, overweight passengers, handicapped people, etc. iii. Monitor restricted areas to ensure that only authorized persons have access to them iv. Controlled and safe embarking and disembarking of passengers ▶ Project 2. Safety & security for cruise tourism. Development of specific emergency management plans to reduce the potential harm/damage caused by crises occurring in cruise tourism destinations. <ul style="list-style-type: none"> • Develop environmental and social safeguards related to cruise tourism such as social conflicts, waste disposal, fuel spills, ballast water, bio-pollution, etc. For special marine ecosystem and land ecosystem regulations such as the limited number of cruise passengers who may disembark and the special conditions under which they may do so, might have to be decided in order to preserve the ecosystem's health. • Development of specific risk management plans for cruise tourism destinations and tourism operators, including incidents resulting from mass panic, hurricane response, etc. • Development of emergency response/evacuation plans • Development of facilities providing first aid and health assistance in the vicinity of the cruise tourism destinations • Police patrol in and outside the cruise terminal • Development of tourism-specific laws and strong law enforcement associated with burglaries, petty-thieves, armed attacks, drug dealing and scamming. • Development of a search and rescue mechanism and task team force prepared to respond to product specific emergency rescue missions, such as search for lost visitors at cultural site or in caves, etc. ▶ Project 3. Integrated Quality Management system. Development of best practice guidelines for cruise tourism operators for a voluntary adhesion to the national IQM system. 	<p>Project 1: Starting date: 2012 Implementation: 2 year Update: 2020 for 2 years Total: 4 years</p> <p>Project 2: Starting date: 2015 Duration: 6 years</p> <p>Project 3: Starting date: 2022 Duration: continuous</p>

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1.4.4 Sub-program for Standards and Safety & Security Assurance of Cruise Tourism

Lead Responsible	Strategic Partners
BTB Belize Port Authorities Service suppliers Ministry of Tourism	Ministry of Works City Councils Ministry of Police and Public Safety Belize Cruise Industry Association Fort George Terminal
Destinations for implementation	
Central Coast Belize, Northern Belize, South Eastern Coast Belize	
Estimated cost (USD)	Potential financing sources
USD 2,170,000	BTB - Licensing fees Fort George Terminal

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1.4.5 Sub-program for Capacity Building of Cruise Tourism

Description and Projects		Time frame
<p>The sub-program for the development capacity building modules and trainings for stakeholders involved in the tourism activities (or tourism related activities) of the Cruise tourism product include training opportunities for the tourism services involved.</p> <p>► Project 1. Continuous training for cruise tourism services on land. Development of different tourism and tourism product related training programs required by Cruise Tourism operational and management staff to enhance their skills and performance and hence to enhance the customer's experience at the destinations.</p> <ul style="list-style-type: none">• Assessment of requirements identified by the local stakeholders and including capacity building seminars related to the cruise industry such as tour guides, taxi and bus drivers, merchants, food vendors, artisans, etc.• Tour guide training, special interest topics and foreign language courses for tour guides and tour escorts• SME-management training• Hospitality trainings• Creativity seminars and enhanced knowledge on possible local raw material that could be utilized for the production of local arts and crafts• Marketing & Sales <p>► Project 2. Specific cruise ships services training: This project develops the human resource skills for providing services to the boats and passengers arriving at Belize's cruise tourism terminals and include training modules on:</p> <ul style="list-style-type: none">• Disembarking and embarking assistance of tender service for cruise ships at anchor• Logistics (food and water supplies)• Boat mechanics, maintenance and electrics services• Safety and security training for tender boat employees• Services of tugboat• Shipping agent• Fuelling• Provisioning• Waste and waste water discharging		<p>Project 1: Starting date: 2015 Duration: continuous</p> <p>Project 2: Starting date: 2015 Duration: continuous</p>
Lead Responsible	Strategic Partners	
BTB (product development) Port Authority Cruise Terminals Belize Cruise Industry Association	BTB (quality development) Beltraide – Ministry of Economic Development National Training Institution (university, vocational training centers) BTIA, Belize National Tour Operator Association, Belize Tour Guide Association Belize Arts and Crafts Association Coastal Zone Management - Authority & Institute	
Destinations for implementation		
Central Coast Belize, South Eastern Coast Belize		
Estimated cost (USD)	Potential financing sources	
USD 4,800,000	Student Fees Private sector Cruise Terminals	

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1.4.6 Sub-program for Sustainability of Cruise Tourism

Description and Projects	Time frame
<p>The sub-program for long-term sustainability of Cruise Tourism development designs mechanisms to assure that the social safe guards and the land/ecosystem's protection, conservation and economic development requirements are met.</p> <ul style="list-style-type: none"> ▶ Project 1. Cruise tourism area use plan. The plan will structure Belize's cruise tourism destinations as a product, mapping each destination with: <ul style="list-style-type: none"> • Specific channels and maritime routes for specific vessels (according to their size) in order to approach Central Coast Belize and South Eastern Coast Belize and cruise tourism destinations without harming the reef and other ecosystems • Specific criteria for the development of cruise tourism anchorage areas, embarking and disembarking areas • Specific transportation and logistics areas on land in order to provide a sustainable structure for the path to and from the destination and tourism assets • Specific areas for shopping and vendors to provide possibilities for local inclusion • Specific areas to carry out boating maintenance and logistic activities such as waste discharging and water provisioning to avoid the possibility of boats discharging waste into the open waters ▶ Project 2. Cruise tourism asset management and conservation. This project defines cruise tourism safeguarding instruments that should be considered when developing and operating cruise tourism sites and resources. <ul style="list-style-type: none"> • Hence, it requires the identification and assessment of the vulnerability of tourism assets consumed by cruise tourism market. • The development of indicators, responsibilities and roles for monitoring, reporting and communication processes to create a set of offensive and defensive strategies, which will help to maintain sustainable and structured development of the tourism product. • Assess and designate Particularly Sensitive Sea Areas (PSSAs) which are recognized for their ecological, socioeconomic or scientific importance and where navigation is restricted in order to protect their vulnerable environment. These areas need to be designated and adopt appropriate protective measurement. • Development of safeguarding and proactive mechanisms to prevent the destination's degradation, by developing a Visitor Management Plans for assets visited by pocket cruise passengers • Development of a Visitor Management Plan and a Crowd Control Plan for each tourism destinations and assets visited by conventional cruise tourists. These plans should become a prerequisite management tool of each cruise arrival hub in order to better channel tourism streams through the destination. This project develops a destination Visitor Management Plan and destination Crowd Control Management Plan for each cruise tourism destination (Belize City and Riversdale). These plans utilize information provided by sites visited by cruise passengers and assure an enhanced visitors' and residents' experiences. The plan will assist in harmonizing the experiences shared by overnight and day visitors and to safeguard the natural and cultural assets and prevent the destination sites degradation. They should include at least: <ol style="list-style-type: none"> i. Capacity control in each site; ii. cruise visitor's flows capacity management in land; iii. Limit number of cruise passengers by tourism assets/attraction iv. definition of measures to be adopted in case of trespassing operational or capacity limits for destinations, v. The destination visitor's management plan will develop strategies for sites/assets such as: reduce the visitation numbers of specific sites, re-distribute tourism flows, develop additional products, manipulate/influence the visitor's behavior, increase the capacities of the sites/assets, etc. 	<p>Project 1: Starting date: 2012 Duration: 4 years</p> <p>Project 2: Starting date: 2015 Duration: 7 years</p> <p>Project 3: Starting date: 2014 Duration: continuous</p>

1.4.6 Sub-program for Sustainability of Cruise Tourism

<ul style="list-style-type: none"> Development of an annual monitoring system for: <ul style="list-style-type: none"> i. environmental and social impact caused by cruise passengers ii. tourism flow distribution including regulations per tourism site and activities undertaken by cruise passengers ▶ Project 3. Cruise tourism inclusion mechanisms. Identification and activation of mechanisms adapted for the Belize destination's reality to reduce support poverty reduction by including communities and their economic initiatives providing employment opportunities to citizens, micro-enterprise and opportunities to become suppliers to the cruise tourism industry and develop philanthropic initiatives. To encourage philanthropic initiatives for incoming cruises as regards to social involvement, pro-poor tourism and local consumption and enhance the development for poverty reduction mechanisms through cruise tourism. <ul style="list-style-type: none"> i. Provide opportunities for the development of pro-poor enterprise: e.g. merchants (handicraft, food stalls) or provide employment opportunities ii. Search for possible partnership partners (e.g. FCCA) to include various community projects in Belize, such as: Cleaning beaches/roads, Paving schools/hospital/orphanages, hurricane clean-up, cruise crew visiting elderly Belizeans, community projects, hospital volunteering, etc. iii. Further philanthropic initiatives could result from sponsorships/donations of cruise line companies and/or individual cruise passengers. To support local communities' economic initiatives related to Cruise Tourism by developing business linkage programs between cruise tourism companies/liners and community supplies. 	
Lead Responsible	Strategic Partners
BTB (product development) Belize Cruise Industry Association Fort George Terminal	Friends of Conservation and Development NGOs PACT Universities and scholars
Destinations for implementation	
Central Coast Belize, Northern Belize, South Eastern Coast Belize	
Estimated cost (USD)	Potential financing sources
USD 3,180,000	PACT NGOs Operation Fees Donations Cruise line companies

1.4.7 Sub-program for Governance of Cruise Tourism

Description and Projects		Time frame
<p>The sub-program for the legislation amendments of Cruise tourism focuses on the existing Coastal Zone Management Act, Belize Cruise Tourism Policy and other or new legislative regulations and regulatory frameworks that govern the safety and sustainability of Belize's waters and destinations impacted by cruise tourism.</p> <ul style="list-style-type: none"> ▶ Project 1. Strengthening of entities. This project highlights and strengthens the new or modified organizations/entities that work during the implementation of the Program for Cruise Tourism Development. <ul style="list-style-type: none"> • Belize City Cruise Negotiation and Destination Management Commission should coordinate with connectivity development committees. This commission also intends to transform and strengthen the Belize's Cruise Tourism Advisory Committee as a negotiation and management committee. • Belize Riviera (Riversdale) Pocket Cruise Negotiation and Destination Management Committee. Establishment and strengthening of the committee. ▶ Project 2. Regulations, norms and law development for cruise tourism: across the board regulation development on the value chain for cruise tourism, either inserting product specificities to the existing law, or developing new regulations frameworks. <ul style="list-style-type: none"> • Development of tourism-specific laws and strong law enforcement • Develop and include juridical enforcement that each cruise tourism destination develops its own Cruise Passenger/Visitor's Management Plans and national guidelines for the operational support services provided by the industry to the cruise passengers • Develop with consultation of all relevant actors of a strong public policy on cruises to create maximum benefits for the cities which welcome cruise ships, create security and ordered growth, as well as increased links between the various sectors which offer tourist services. • Legal security for real estate investment in the port area • Set concrete docking-standards (such as a maximum amount of cruise passenger disembarking per day, maximum boat speed, maximum boat length and depth, etc.) and anchorage standards which involve strong law enforcements including fines. 		<p>Project 1 in CCB: Starting date: 2012 Duration: continuous</p> <p>Project 1 in SECB: Starting date: 2015 Duration: continuous</p> <p>Project 2: Starting date: 2012 Implementation: 2 years</p>
Lead Responsible		Strategic Partners
BTB (product development) Belize Port Authorities Fort George Cruise Terminal Riversdale Pocket Cruise Terminal		Ministry of Tourism Ministry of Police and Public Safety NSTTF City Councils Belize Cruise Industry Association Universities and scholars
Destinations for implementation		
Central Coast Belize, South Eastern Coast Belize, Northern Belize		
Estimated cost (USD)		Potential financing sources
USD 1,120,000		Belize Port Authorities Ministry of Tourism

1.4.8 Cruise Tourism Development Program Implementation Schedule

Project/Year	2012	2013	2014	2015	2016	2017	2018	2019	2020
Program for Cruise Tourism Development									
Sub-program for Business & Product Development of Cruise Tourism									
Project 1: Belize City Main Cruise Hub Development									
Project 2: Riviera Belize (Riversdale) Pocket Cruise Development									
Project 3: Belize Cruise Negotiation and Destination Management Committee									
Project 4: Development of Port Loyola Cruise Village area									
Sub-program for Infrastructure and Accessibility of Cruise Tourism									
Project 1: Ships and boats accessibility for Cruise Tourism									
Project 2: Land infrastructure for Cruise Tourism									
Project 3: Basic services consolidation									
Project 4: Ships services development									
Project 5: Development of Port Loyola Cruise Terminal									
Sub-program for Marketing and Awareness of Cruise Tourism									
Project 1: Belize Cruise Tourism Brands									
Project 2: Cruise Tourism product club									
Project 3: Promotion, communication & PR									
Project 4: Cruise specific awareness development									
Sub-program for Standards and Safety & Security Assurance of Cruise Tourism									
Project 1: Operational guidelines and standards for Cruise Tourism									
Project 2: Safety & security for cruise tourism									
Project 3: Integrated Quality Management system									
Sub-program for Capacity Building of Cruise Tourism									
Project 1: Continuous training for cruise tourism services on land									
Project 2: Specific cruise ships services training									
Sub-program for Sustainability of Cruise Tourism									
Project 1: Cruise tourism area use plan									
Project 2: Cruise tourism asset management and conservation									
Project 3: Cruise tourism inclusion mechanisms									
Sub-program for Governance of Cruise Tourism									
Project 1: Creation of new entities									
Project 2: Regulations, norms and law development for cruise tourism									

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Project/Year	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Program for Cruise Tourism Development										
Sub-program for Business & Product Development of Cruise Tourism										
Project 1: Belize City Main Cruise Hub Development										
Project 2: Riviera Belize (Riversdale) Pocket Cruise Development										
Project 3: Belize Cruise Negotiation and Destination Management Committee										
Project 4: Development of Port Loyola Cruise Village area										
Sub-program for Infrastructure and Accessibility of Cruise Tourism										
Project 1: Ships and boats accessibility for Cruise Tourism										
Project 2: Land infrastructure for Cruise Tourism										
Project 3: Basic services consolidation										
Project 4: Ships services development										
Project 5: Development of Port Loyola Cruise Terminal										
Sub-program for Marketing and Awareness of Cruise Tourism										
Project 1: Belize Cruise Tourism Brands										
Project 2: Cruise Tourism product club										
Project 3: Promotion, communication & PR										
Project 4: Cruise specific awareness development										
Sub-program for Standards and Safety & Security Assurance of Cruise Tourism										
Project 1: Operational guidelines and standards for Cruise Tourism										
Project 2: Safety & security for cruise tourism										
Project 3: Integrated Quality Management system										
Sub-program for Capacity Building of Cruise Tourism										
Project 1: Continuous training for cruise tourism services on land										
Project 2: Specific cruise ships services training										
Sub-program for Sustainability of Cruise Tourism										
Project 1: Cruise tourism area use plan										
Project 2: Cruise tourism asset management and conservation										
Project 3: Cruise tourism inclusion mechanisms										
Sub-program for Governance of Cruise Tourism										
Project 1: Creation of new entities										
Project 2: Regulations, norms and law development for cruise tourism										

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Project/Year	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Program for Cruise Tourism Development										
Sub-program for Business & Product Development of Cruise Tourism										
Project 1: Belize City Main Cruise Hub Development										
Project 2: Riviera Belize (Riversdale) Pocket Cruise Development										
Project 3: Belize Cruise Negotiation and Destination Management Committee										
Sub-program for Infrastructure and Accessibility of Cruise Tourism										
Project 1: Ships and boats accessibility for Cruise Tourism										
Project 2: Land infrastructure for Cruise Tourism										
Project 3: Basic services consolidation										
Project 4: Ships services development										
Sub-program for Marketing and Awareness of Cruise Tourism										
Project 1: Belize Cruise Tourism Brands										
Project 2: Cruise Tourism product club										
Project 3: Promotion, communication & PR										
Project 4: Cruise specific awareness development										
Sub-program for Standards and Safety & Security Assurance of Cruise Tourism										
Project 1: Operational guidelines and standards for Cruise Tourism										
Project 2: Safety & security for cruise tourism										
Project 3: Integrated Quality Management system										
Sub-program for Capacity Building of Cruise Tourism										
Project 1: Continuous training for cruise tourism services on land										
Project 2: Specific cruise ships services training										
Sub-program for Sustainability of Cruise Tourism										
Project 1: Cruise tourism area use plan										
Project 2: Cruise tourism asset management and conservation										
Project 3: Cruise tourism inclusion mechanisms										
Sub-program for Governance of Cruise Tourism										
Project 1: Creation of new entities										
Project 2: Regulations, norms and law development for cruise tourism										

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1.4.9 Cruise Tourism Program Cost Model

Cruise Tourism Product Budget

Project/Year	Total (US\$)	2012	2013	2014	2015	2016	2017	2018	2019	2020
Program for Cruise Tourism Development	94,960,000	4,125,000	6,570,000	8,350,000	9,425,000	9,160,000	11,070,000	9,920,000	7,140,000	7,290,000
Sub-program for Business & Product Development of Cruise Tourism	32,200,000	2,500,000	2,500,000	2,500,000	3,600,000	3,650,000	2,500,000	2,650,000	2,650,000	2,650,000
Project 1: Belize City Main Cruise Hub Development	20,500,000	2,500,000	2,500,000	2,500,000	2,500,000	2,500,000		1,500,000	1,500,000	1,500,000
Project 2: Pocket cruise "New Stann Creek" development (Riversdale)	4,600,000				600,000	1,000,000	2,000,000	1,000,000		
Project 3: Belize Cruise Negotiation and Destination Management Committee	3,100,000				500,000	150,000	500,000	150,000	150,000	150,000
Project 4: Port Loyola B. development	4,000,000								1,000,000	1,000,000
Sub-program for Infrastructure and Accessibility of Cruise Tourism	41,970,000	600,000	3,225,000	5,200,000	4,225,000	4,200,000	7,260,000	6,260,000	3,500,000	3,500,000
Project 1: Ships and boats accessibility for Cruise Tourism	550,000	200,000	75,000	200,000	75,000					
Project 2: Land infrastructure for Cruise Tourism	26,400,000	400,000	3,000,000	3,000,000	3,000,000	3,000,000	3,500,000	2,500,000	2,000,000	2,000,000
Project 3: Basic services consolidation	6,520,000			2,000,000	1,000,000	1,000,000	1,260,000	1,260,000		
Project 4: Ships services development	500,000		150,000		150,000	200,000				
Project 5: Port Loyola cruise terminal development	8,000,000						2,500,000	2,500,000	1,500,000	1,500,000
Sub-program for Marketing and Awareness of Cruise Tourism	9,520,000	400,000	450,000	400,000	400,000	380,000	380,000	380,000	360,000	360,000
Project 1: Belize Cruise Tourism Brands	50,000		50,000							
Project 2: Cruise Tourism product club	2,500,000									
Project 3: Promotion, communication & PR	5,700,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000
Project 4: Cruise specific awareness development	1,270,000	100,000	100,000	100,000	100,000	80,000	80,000	80,000	60,000	60,000
Sub-program for Standards and Safety & Security Assurance of Cruise Tourism	2,170,000	150,000	50,000	-	400,000	400,000	400,000	100,000	100,000	250,000
Project 1: Operational guidelines and standards for Cruise Tourism	400,000	150,000	50,000							150,000
Project 2: Safety & security for cruise tourism	1,500,000				400,000	400,000	400,000	100,000	100,000	100,000
Project 3: Integrated Quality Management system	270,000									
Sub-program for Capacity Building of Cruise Tourism	4,800,000	-	-	-	300,000	300,000	300,000	300,000	300,000	300,000
Project 1: Continuous training for cruise tourism services on land	2,400,000				150,000	150,000	150,000	150,000	150,000	150,000
Project 2: Specific cruise ships services training	2,400,000				150,000	150,000	150,000	150,000	150,000	150,000
Sub-program for Sustainability of Cruise Tourism	3,180,000	275,000	275,000	200,000	450,000	180,000	180,000	180,000	180,000	180,000
Project 1: Cruise tourism area use plan	750,000	275,000	275,000	100,000	100,000					
Project 2: Cruise tourism asset management and conservation	730,000				250,000	80,000	80,000	80,000	80,000	80,000
Project 3: Cruise tourism inclusion mechanisms	1,700,000			100,000	100,000	100,000	100,000	100,000	100,000	100,000
Sub-program for Governance of Cruise Tourism	1,120,000	200,000	70,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000
Project 1: Strengthening of entities	950,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000
Project 2: Regulations, norms and law development for cruise tourism	170,000	150,000	20,000							
TOTAL BUDGET CRUISE TOURISM MACRO PROGRAM	94,960,000.00	4,125,000.00	6,570,000.00	8,350,000.00	9,425,000.00	9,160,000.00	11,070,000.00	9,920,000.00	7,140,000.00	7,290,000.00

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Cruise Tourism Product Budget

Project/Year	Total (US\$)	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Program for Cruise Tourism Development	94,960,000	5,840,000	4,230,000	1,230,000	1,230,000	1,230,000	1,230,000	1,230,000	1,230,000	2,230,000	2,230,000
Sub-program for Business & Product Development of Cruise Tourism	32,200,000	2,650,000	1,150,000	150,000	150,000	150,000	150,000	150,000	150,000	1,150,000	1,150,000
Project 1: Belize City Main Cruise Hub Development	20,500,000	1,500,000								1,000,000	1,000,000
Project 2: Pocket cruise "New Stann Creek" development (Riversdale)	4,600,000										
Project 3: Belize Cruise Negotiation and Destination Management Committee	3,100,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000
Project 4: Port Loyola B. development	4,000,000	1,000,000	1,000,000								
Sub-program for Infrastructure and Accessibility of Cruise Tourism	41,970,000	2,000,000	2,000,000	-	-	-	-	-	-	-	-
Project 1: Ships and boats accessibility for Cruise Tourism	550,000										
Project 2: Land infrastructure for Cruise Tourism	26,400,000	2,000,000	2,000,000								
Project 3: Basic services consolidation	6,520,000										
Project 4: Ships services development	500,000										
Project 5: Port Loyola cruise terminal development	8,000,000										
Sub-program for Marketing and Awareness of Cruise Tourism	9,520,000	610,000	600,000	600,000	600,000	600,000	600,000	600,000	600,000	600,000	600,000
Project 1: Belize Cruise Tourism Brands	50,000										
Project 2: Cruise Tourism product club	2,500,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000
Project 3: Promotion, communication & PR	5,700,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000
Project 4: Cruise specific awareness development	1,270,000	60,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000
Sub-program for Standards and Safety & Security Assurance of Cruise Tourism	2,170,000	50,000	30,000	30,000	30,000	30,000	30,000	30,000	30,000	30,000	30,000
Project 1: Operational guidelines and standards for Cruise Tourism	400,000	50,000									
Project 2: Safety & security for cruise tourism	1,500,000										
Project 3: Integrated Quality Management system	270,000		30,000	30,000	30,000	30,000	30,000	30,000	30,000	30,000	30,000
Sub-program for Capacity Building of Cruise Tourism	4,800,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000
Project 1: Continuous training for cruise tourism services on land	2,400,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000
Project 2: Specific cruise ships services training	2,400,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000
Sub-program for Sustainability of Cruise Tourism	3,180,000	180,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
Project 1: Cruise tourism area use plan	750,000										
Project 2: Cruise tourism asset management and conservation	730,000	80,000									
Project 3: Cruise tourism inclusion mechanisms	1,700,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
Sub-program for Governance of Cruise Tourism	1,120,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000
Project 1: Strengthening of entities	950,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000
Project 2: Regulations, norms and law development for cruise tourism	170,000										
TOTAL BUDGET CRUISE TOURISM MACRO PROGRAM	94,960,000.00	5,840,000.00	4,230,000.00	1,230,000.00	1,230,000.00	1,230,000.00	1,230,000.00	1,230,000.00	1,230,000.00	2,230,000.00	2,230,000.00

1.5 Program for Nautical Tourism Development

Product Concept

Nautical Tourism brings together sports, recreational activities and tourism. It is the navigation and journeying of tourists / boaters in vessels (yachts, boats, sailing, motorboat, charter boat etc.) and in nautical tourism ports, aimed at recreation and entertainment. It therefore involves marinas or boat shelters and water-based activities on or off the vessel, covering navigation both in closed seas, rivers, lakes, as well as on seas and oceans into international waters.

For the consumption of Nautical Tourism tourists may arrive in Belize on their own private boat, or just lease it upon arrival.

Nautical Tourism products and services include:

- ▶ Accommodation for vessels along the sheltered coast
- ▶ Renting vessels for recreation and entertainment (charter, cruising, etc.)
- ▶ Skipper services
- ▶ Accommodation, shelter and maintenance of vessels berthed in the sea or at dry berth
- ▶ Supplying boaters with water, fuel, food, spare parts, equipment etc.
- ▶ Fitting and preparing vessels
- ▶ Providing information for boaters (weather forecasts, navigational pilots, etc.)
- ▶ Courses for sailing, skippers and boat operators
- ▶ Floating houses and floating hotels

Gaps identified – Diagnostic

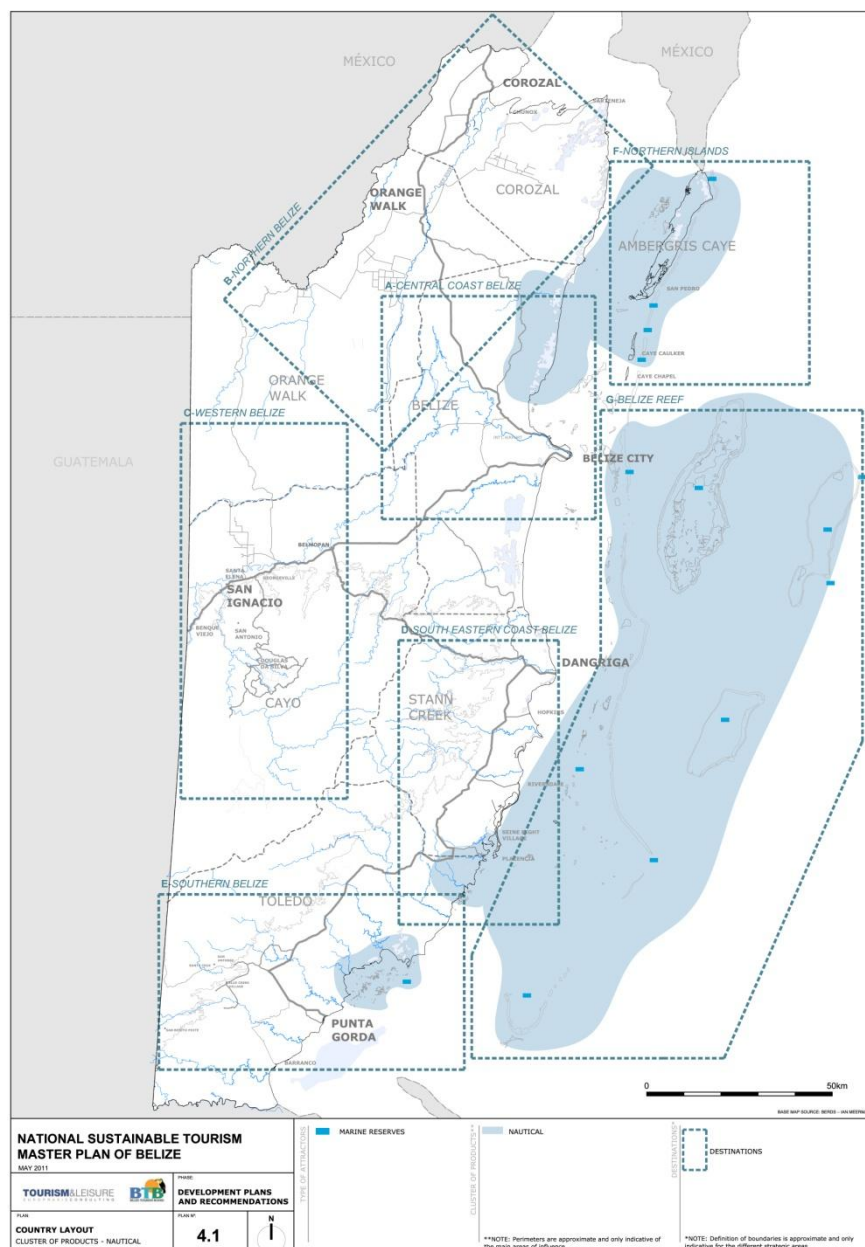
- ▶ Until today, the nautical tourism product has not been developed as a structured tourism offering.
- ▶ Furthermore, it has been identified that there is an untapped market of recreational boats/yachts/sailboats that already use Belizean waters and cayes but that little to no economic benefit is derived from the activity given that there are no services offered to them.
- ▶ However, during the diagnostic phase it has been understood that navigating through Belize's waters can be complicated, especially relating to border crossing issues such as: customs regulations, and immigration and border management.
- ▶ Additionally, policing and law/fine enforcement is weak and further degradation to the natural environment caused by boats and yachts navigating through the coral reef. In order to assure the sustainability of the tourism product with the fragile eco-system: open waters require mapping of speed limits, mapping of waterways depending on boat depth and mooring buoys.

Vision Nautical Tourism 2030

Although, ferries and boats cross Belizean waters, the nautical tourism product is new to Belize, and is in an underdeveloped stage prior to being launched. However, by 2030, it is expected to become a consolidated tourism product. Belize's nautical tourism will be supported by a full system of marinas along the Belizean coast providing a full set of specialized services. The product will offer the visitor marinas throughout the country, diverse sailing routes, sailing activities, boat and crew rentals, sailing schools, etc.

Nautical tourism destinations and product development

The map depicts areas where nautical tourism should be developed: Northern Islands, Belize Reef, South Eastern Coast Belize and Southern Belize. Based on the current and potential competitiveness, importance and attractiveness of its assets, Northern Islands' and South Belize Reef's nautical tourism has the potential to become the main tourism product and hence to act as a main tourist attractor to the destinations. In Central Coast Belize and Southern Belize nautical tourism will be regarded as secondary tourism product.



Source: T&L

The nautical tourism concept will initiate its development in Belize by 2012 **South Eastern Coast Belize** (Placencia and New Development area north of Riversdale) by master planning the marinas as starting and arrival point of a Belize ocean yachting and sailing experience. The marina should be structured as the main starting point for a sailing/boating trip through Belize's waters and the Caribbean and contain different Nautical Tourism infrastructures, including

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overnight-docking marina attracting small yachts and pocket cruisers and short-stay docking piers with shops, restaurants, etc.

In **Central Coast Belize**, Nautical Tourism will be structured through a range of relevant infrastructures, including one overnight-docking marina attracting small yachts and sailing boats.

In **Northern Islands**, Nautical Tourism could be structured as a main tourism product offering various components, such as an attractive marina with waterfront entertainment and tourism services including accommodation, restaurants, bars, shopping opportunities, sailing and fishing schools, etc.

Further piers to be developed are in **Belize Reef** providing boat services and services to visitors. Another marina is recommended for development in **Southern Belize** providing infrastructures on short-stay docking piers with shops, waterfront accommodation, restaurants, bars, canoe and kayak rentals, diving and snorkeling schools, day leisure activities, etc.

As described above, the graph below illustrates the product development phases by destination:

		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
South Eastern Coast	Nautical																				
Central Coast Belize	Nautical																				
Northern Islands	Nautical																				
Southern Belize	Nautical																				
Belize Reef	Nautical																				

Description of the program

The program prepares nautical tourism including its infrastructural developments and remodeling in order to enhance the tourism experience from the moment of arriving in Belize's open waters (including improved cross-border arrangements for foreign visitors). It also ensures the provision of support services for boats and passengers. It will foster a network/association as umbrella organization for Belize's marinas and sail clubs for enhanced marketing and promotion, improve quality standards, capacity building and training seminars and lobby for policy improvements/changes.

The Program for Nautical Tourism Development is to develop two main projects for the business & product development, namely:

- ▶ **Integral Marinas Destination Development** identifying the most appropriate concept/business model and creating a network of marinas and sail clubs.
- ▶ **Destination Development of Nautical Tourism** feasibility analysis for the destination and marina terminals, hence the master planning, mix use facility development, business development planning, the land/sea infrastructure, etc.

Lead stakeholders

BTB's Nautical Tourism product manager in cooperation with Ministry of Natural Resources and Environment, Belize's Port Authority and Coastal Zone Management, will be the leading institutions for the products' sustainable development strongly focusing on the monitoring of potential risks that could result in the degradation of Belize's reef and the destination.

Objectives

The Belize 2030 objectives of the Nautical Tourism Development Program are:

- ▶ To enhance overnights spent in Belize and attract new markets and market segments by diversifying Belize's tourism product and service portfolio by designing, structuring and

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developing nautical tourism activities (fishing, regattas) and man-made facilities including yacht and sailing boat marinas, sail clubs, etc.

- ▶ To enhance yachtsmen's experience by improving accessibility from the main tourism hub services by developing 5 marinas offering enhanced safety and security conditions on the waters and at the marinas.
- ▶ To enhance Belize's competitiveness as a nautical tourism destination by providing a set of nautical tourism products and trained personnel offering boat specific services in order to reach an international fierce brand identify.
- ▶ To enhance the satisfaction level of local (civil, private sector) and foreign (tourists and international cruise companies) with the safety measures, tourism services and product offered.
- ▶ To utilize nautical tourism as a tool for enhancing local participation by offering enhanced opportunities in education and training, and assorted mechanisms to reduce poverty by diversifying the value chain of the tourism product.

Milestones

Review Years	Milestones
2015	<ul style="list-style-type: none"> ▶ Development of the new South Eastern Coast Belize marinas ▶ Improved access for boats and ferries ▶ Design of the Belize Marine and Sailing Club Brand ▶ Launch of the product specific awareness campaign ▶ Implementation of the continuous training for Nautical Tourism ▶ Definition of the nautical tourism area use plan ▶ Creation of the nautical tourism asset management and inclusion mechanisms systems
2020	<ul style="list-style-type: none"> ▶ Development of the new marinas, the land infrastructure and systems in the Central Coast Belize, Northern islands, Belize Reef, Southern Belize areas ▶ Launch of the PR, promotion and communication campaign ▶ Implementation of support services for visitors and other on-shore docking locations dedicated to tourism ▶ Definition of the security and safety guidelines for nautical tourism ▶ Design of the rules and regulation for nautical tourism ▶ Implementation of the integrated quality management system
2025	<ul style="list-style-type: none"> ▶ Launch of the Nautical Tourism product club
2030	<ul style="list-style-type: none"> ▶ Continuous implementation and management

Proposed subprograms and projects

1.5.1 Sub-program for Business & Product Development of Nautical Tourism

Description and Projects	Time frame
<p>The sub-program for the development of the Nautical tourism product and its business includes various phases such as the conceptualization, the business model, the planning, the negotiations, and the management (including branding, marketing, promotion, policy) in order to structure Nautical tourism as attractive and successful tourism product for foreign and domestic markets.</p> <ul style="list-style-type: none"> ▶ Project 1: Integral Marinas Destinations Development. The development process will state in a manual the marina's business model and master planning (related to sub-program 1.5.2 Infrastructure development for nautical tourism) requires a team of professionals to analyze the possible services the destination should offer. <ul style="list-style-type: none"> • Development phase will require for each destination: <ul style="list-style-type: none"> i. Conceptualization of nautical destination ii. A market and feasibility study providing information on the potential market segments that will be targeted and hence how the products will be conceptualized and offered. iii. The business model development (based on the results of the demand analysis) of each marina including its activities, attractions and services such as: sailing schools, entertainment activities, bars, water-front lodging, tour operators and information centers. Specific product related services could be e.g. boat rental, repairs, sales and charters, professional fishing guides, acquisition of fishing licenses, canoes/kayak rentals, etc. iv. A technical land planning study to master plan the destination including all its different tourism services and activities and its basic services and infrastructures, such as land plots dedicated to the retail shopping area/restaurants/roads/entertainment area/commercial centers, etc. v. Development of Offering Memorandums in order to inform potential investors on the possibilities at the marinas and state the objectives, business opportunities and terms of investment. Investor/Operator research (or search for international brands or retailers) and negotiations. Negotiation and contracting of developers and operators vi. Specific laws and regulation according to Belize's land policy and operational guidelines. ▶ Project 2: Development of destination 1: Nautical Tourism in South Eastern Coast Belize. Nautical Tourism should begin its first developments in South Eastern Central Coast Belize. The marina should be structured as the main starting point for a sailing/boating trip through Belize's waters and the Caribbean and contain different Nautical Tourism infrastructures, including overnight-docking marina attracting small yachts and pocket cruisers and short-stay docking piers with shops, restaurants, etc. ▶ Project 3: Development of destination 2: Nautical Tourism in Central Coast Belize. Nautical tourism will be structured in Central Coast Belize with different Nautical Tourism infrastructures, including one overnight-docking marina attracting small yachts and sailing boats. ▶ Project 4: Development of destination 3: Nautical Tourism in Northern Islands. Nautical Tourism could be structured as a main tourism product offering various components, such as an attractive marina with water-front entertainment and tourism services including accommodation, restaurants, bars, shopping opportunities, sailing and fishing schools, etc. ▶ Project 5: Development of destination 4: Nautical Tourism in Belize Reef. Nautical tourism will be structured in Belize Reef with diverse infrastructure and services, including overnight-docking marina attracting small yachts and other short-stay docking piers. The aim is low density high quality tourism development and to upkeep environmental safeguards. 	<p>Project 1: Starting date: 2012 Implementation: 2 years for manual</p> <p>Project 2: Starting date Dest1: 2012 Implementation: 3 years Starting date Dest2: 2017 Implementation: 3 years</p> <p>Project 3: Starting date: 2016 Duration: 5 years</p> <p>Project 4: Starting date: 2016 Implementation: 5 years</p> <p>Project 5: Starting date: 2020 Implementation: 5 years</p> <p>Project 6: Starting date: 2020 Implementation: 5 years</p>

1.5.1 Sub-program for Business & Product Development of Nautical Tourism

<p>► Project 6: Development of destination 5: Nautical Tourism in Southern Belize. Nautical tourism will be structured in Southern Belize with different Nautical Tourism infrastructures on short-stay docking piers with shops, waterfront accommodations, restaurants, bars, canoe and kayak rentals, diving and snorkeling schools, day leisure activities, etc.</p>	
Lead Responsible	Strategic Partners
BTB (product development) NSTTF	Beltraide, Ministry of Economic Development BTIA Coastal Zone Management - Authority & Institute Healthy Reef, Green Reef Friends of Conservation and Development
Destinations for implementation	
Central Coast Belize, Northern Islands, South Eastern Coast Belize, Southern Belize, Belize Reef	
Estimated cost (USD)	Potential financing sources
USD 9,800,000	Member fee of Belize Marine & Sailing Club Network/Association Private sector investment NSTTF

1.5.2 Sub-program for Infrastructure and Accessibility of Nautical tourism

Description and Projects	Time frame
<p>The sub-program for the infrastructure development of Nautical Tourism destinations will include different access possibilities enhancing the arrival to Belize's nautical tourism destination, with diverse possibilities for anchoring at the destinations. Furthermore, the product will be structured into an integrated system of boating and tourism related infrastructure, facilities and services.</p> <ul style="list-style-type: none"> ▶ Project 1. Boat accessibility and nautical routes. This project develops the regulations of the access of boats of different sizes to access marinas, piers and anchorage points. <ul style="list-style-type: none"> • Assessment of national nautical tourism development including stakeholder participation in the development and location of new marinas, large piers and additional anchorage points, such as in Belize Reef, Southern Belize, South Eastern Coast Belize. • Development of regulations for each of these facilities including which types of boats can be berthed at each site depending on the sea/sand level. Preference should be given to sites that do not require dredging. • Development of specific customs, immigration and cross-border arrangements to enable straightforward and rapid access to Belizean waters and provide registration possibilities at the onshore marinas and piers. • Development of services for disembarking and embarking in order to enable simple land access to the different destinations. <i>E.g.</i> maritime officials providing information on the possible disembarking opportunities, tender boat services for larger vessels anchoring at sea, direct communication with port/sea authorities by radio, etc. • Structure everything under a nautical tourism route, with its own tourism attractions ▶ Project 2. Land infrastructure and systems for Nautical Tourism. With the assistance of NSTTF for master planning the marinas, specific areas should be allocated for: a registration/information area for arriving passengers, the development of visitor centers, shopping and entertainment facilities, restaurants, supermarkets, car-rental companies, parking lots, a police station, specific traffic signs to identify the locations, first aid/medical center, etc. Basic tasks are: <ul style="list-style-type: none"> • Development of new or improved roads and road conditions to main tourism hubs/destinations/sites (e.g. to access Punta Negra/Port of Honduras) • Development of a national signage system for nautical tourism in order to enable easy and fast access to the marinas • The project structures marinas as integrated infrastructure and service destinations accommodating both overnight docking and short onshore stay. The development of overnight docking marinas could offer basic facilities meeting international standards (for a high-end clientele) such as restrooms, showers, picnic areas, laundry service, etc. • The project structures attractive piers offering tourism related services such as restaurants, shopping opportunities, etc. (Fishermen's Wharf) ▶ Project 3. Support services for visitors on marinas and other on-shore docking locations dedicated to tourism. <ul style="list-style-type: none"> • This project structures marinas as integrated infrastructure and service destinations accommodating both overnight docking and short onshore stay. <ul style="list-style-type: none"> i. The development of overnight docking marinas could offer basic facilities meeting international standards (for a high-end clientele) such as restrooms, showers, picnic areas, laundry service, etc. • This project structures piers into an attractive pier offering diverse tourism 	<p>Project 1: Starting date: 2015 Implementation: 2 years</p> <p>Project 2: Starting date: 2016 Implementation: 12 years</p> <p>Project 3: Starting date: 2016 Duration: continuous</p> <p>Project 4: Starting date: 2017 Duration: continuous</p>

1.5.2 Sub-program for Infrastructure and Accessibility of Nautical tourism

related services such as restaurants, shopping opportunities, etc.	
<p>► Project 4. Boat services development. The project aims to organize and facilitate basic services for boats. This will help to incentive sailors to stop over Belize nautical stations. Depending on the marina's / pier's importance, market needs and availability of services. Under this project marinas have to develop and assure basic maintenance services and supplies (such as petrol and gas, waste discharging services, fuel docks, vacuum points for waste water discharging, minor maintenance and services, electrical equipment and technicians, 24h security guards or surveillance, food and amenities supply/provisioning services, boat maintenance, dry storage and custody, boat ramps, transient dockage, repair shop and services, etc.).</p>	
Lead Responsible	Strategic Partners
BTB (product development) NSTTF	Ministry of Works, Beltraide, Ministry of Economic Development Ministry of Foreign Affairs and Foreign Trade Ministry of Transport, Communications and National Emergency Management Belize Port Authority, San Pedro Town Council Healthy Reef, Green Reef, Forest and Marine Reserve Association of Caye Caulker, BTIA
Destinations for implementation	
Central Coast Belize, Northern Islands, Belize Reef, Southern Belize	
Estimated cost (USD)	Potential financing sources
USD 18,530,000	NSTTF Ministry of Works Ministry of Public Utilities

1.5.3 Sub-program for Marketing and Awareness of Nautical Tourism

Description and Projects	Time frame
<p>The sub-program of the operational marketing development for Nautical tourism includes the development of a national Belize Marine & Sailing Club brand and its sub-brands targeting different market segments. Both the national and the sub-brands could be operated and communicated by BTB and BTB's Nautical Tourism product manager. In addition to the branding, marketing, promotion and communication tasks, BTB will strengthen the product's development by creating specific awareness and information campaigns for the private and civil sector.</p> <p>► Project 1: Belize Marine & Sailing Brand: Development of a public / private partnership for a Branding Club, where all members of the Belize Marine & Sailing Club Network/Association can join and participate in partnerships for promotion and commercialization. The Branding Club is connected to the Club Network / Association and intends to create a product quality brand to reach the market.</p> <ul style="list-style-type: none"> Development of the commercial umbrella brand and its sub-brands for selected nautical tourism products to target different potential market segments. <p>► Project 2: Belize Marine & Sailing Club Network/Association. It is focused on product development by facilitating the creation of a public-private partnership for a Marine & Sailing Club/Association. Belize's marinas can join it in order to use the umbrella organization for specific services. This will follow marketing manuals to create tourism product clubs.</p> <ul style="list-style-type: none"> Definition of concept and scope of the Belize Marine & Sailing Club Network/Association 	<p>Project 1: Starting date: 2015 Implementation: 1 year</p> <p>Project 2: Starting date: 2022 Duration: continuous</p> <p>Project 3: Starting date: 2017 Duration: continuous</p> <p>Project 4: Starting date: 2015 Implementation: 6 year</p>

1.5.3 Sub-program for Marketing and Awareness of Nautical Tourism

- i. Definition of the organizational, legal structure of the Club Network/Association and operational tasks and responsibilities
 - ii. Development of self-financing schemes such as member fees
- Development of a Belize Marine & Sailing Club Brand aligned with Nautical Brand
- Development of marketing and promotion actions
 - i. Including partnerships with other international Marine and Sail Clubs and destinations,
 - ii. Organize international activities such as regattas, fishing tournaments.
- Development of environmental and emergency safeguarding mechanisms, such as the establishment/diffusion of code of conducts and plans in close cooperation with specific stakeholders related to the reef and Belize's ecosystem protection/conservation
- Development of monitoring schemes and tools for the development of nautical tourism: product related statistics, customer survey
- Undertake lobbying activities, especially to enhance cross-border arrangements and entry regulations
- Offering of human resource training possibilities to members and their staff (either through members providing opportunities or through other national training institutions/programs)
- **Project 3. Promotion, communication & PR.** Development of marketing collaterals (such as sales brochures and other printed product information including brochures, visual aids used in sales presentations, web content, sales guides). The marketing activities should introduce Nautical Tourism destinations and their nautical tourism facilities and services complemented with Belize's main tourism asset in the surrounding areas in order to attract visitors to undertake on-shore nature-based or sun and beach activities and cultural excursions.
 - Development of a specific Nautical Tourism web-page on BTB's web-site
 - Development of an annual marketing plan including FAM trips, media usage, publishing, direct marketing and other measures aimed at the targeted markets and segments, especially focusing on international nautical clubs and the development of international sailing regattas.
 - Development of special marketing campaigns promoting on-shore experiences for nautical tourism and repeat visitors.
 - Development of marketing kits and promotional items and giveaways.
 - Participation in **Fishing tourism fairs**, e.g.:
 - i. USA: Sport fishing
 - ii. Canada: Outdoor Adventure Show (Toronto)
 - iii. Europe: ITB-Berlin, World Travel Market (UK), BIT-Milan (IT)
 - Advertising in magazines, e.g.:
 - i. USA: American Angler, Bass Master, Florida Sport Fishing, Saltwater Sportsman, Sport Fishing
 - ii. Canada: Outdoor Canada
 - iii. Europe: Angling Times, Sea Angler (UK)
 - iv. Mexico: Conocer Mexico
 - Advertising on websites, e.g.:
 - i. USA: US-sport fishing news, www.sportfishingmag.com, www.floridasportfishing.com
 - ii. Canada: www.outdoorcanada.ca, www.thenewflyfisher.com
 - iii. Europe: www.fishandfly.com, www.gofishing.co.uk (UK)
 - Participation in **Boating and Sailing tourism fairs**, e.g.:
 - i. USA: Boat Sport & Travel Show
 - ii. Europe: International Boat Show (Düsseldorf, GER), Boat and Caravan Show (UK)
 - Advertising in magazines, e.g.:

1.5.3 Sub-program for Marketing and Awareness of Nautical Tourism

<ul style="list-style-type: none"> i. USA: Cruise Travel, Porthole, Caribbean Travel and Life, Blue Water Sailing, Sail Magazine ii. Canada: Canadian Yachting Magazine iii. Europe: Yacht & Yachting (UK), Segeln (GER) • Advertising on websites, e.g.: <ul style="list-style-type: none"> i. USA: www.bwsailing.com ii. Europe: www.segeln-magazin.de (GER), www.ybw.com (UK) <p>► Project 4. Product specific awareness development. Development of awareness programs and campaigns considering specific risks related to the development of Nautical Tourism.</p> <ul style="list-style-type: none"> • Development of awareness to educate stakeholders on feasible practices to mitigate degradation and enhance the quality of the waters, reefs and eco-systems. • Development of awareness campaigns for citizens to raise awareness on the importance and significance of the development of Nautical Tourism, including possible activities for participation and benefiting from the economic activities. • To involve and improve communities attitude towards Nautical tourism, especially environmentalists and conservationists 	
Lead Responsible	Strategic Partners
Belize Marine & Sailing Club Network/ Association BTB (product management)	BTIA Members of the Belize Marine & Sailing Club Network/ Association Tourism Incoming Agencies Tourist Information Centers / Welcome Centers
Destinations for implementation	
Central Coast Belize, Northern Islands, South Eastern Coast Belize, Southern Belize, Belize Reef	
Estimated cost (USD)	Potential financing sources
USD 6,860,000	BTB tourism product marketing and promotion

1.5.4 Sub-program for Standards and Safety & Security Assurance of Nautical Tourism

Description and Projects	Time frame
<p>The sub-program for the safety and security development of Nautical tourism focuses on operational guidelines to prevent negative effects resulting from the development of Nautical Tourism. It consists of developing strategies, laws, law enforcement and preventive/reactive mechanisms to enhance the visitor's safety, security and experience.</p> <p>► Project 1. Operational standards and guidelines for Nautical Tourism. This project will structure the Nautical Tourism product into an integrated system of safety and security standards and guidelines. These guidelines should become a statute by introducing them into the Coastal Zone Management Act or any new legislative act that may be necessary to be developed for the development of Nautical Tourism. The following guidelines/standards should be included:</p> <ul style="list-style-type: none"> • First-Aid and medical centers close to main marinas / important nautical tourism sites in order to serve tourists and hence care for the tourist's experience. • Developing codes of conducts to develop appropriate behavior at Nautical Tourism sites (for tourists, employees, visitors, operators, citizens and other people related to the development of Nautical Tourism) especially for marinas, the conservation of sensitive areas such as the Reef and the marine wildlife, especially manatees. 	<p>Project 1: Starting date: 2015 Implementation: 5 years Duration: continuous</p> <p>Project 2: Starting date: 2016 Implementation: 1 years Duration: continuous</p> <p>Project 3: Starting date: 2022 Implementation: 1 years Duration: continuous</p>

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1.5.4 Sub-program for Standards and Safety & Security Assurance of Nautical Tourism

- Guidelines on limits and obligations for the area's maintenance (aimed at the area's commercial operators) and professional services agencies/companies.
 - Development of specific programs to reduce international border issues, and enhance the hospitality of the water police patrol.
 - Develop specific licensing criteria for nautical tourism guides, e.g. sport fishing guide, skippers, captain
- **Project 2. Safety & security for nautical tourism.** Development of specific emergency management plans reducing the potential harm/damage caused by the incidents which most frequently occur at nautical tourism sites in urban and remote areas, such as: storm, hurricane and flood emergency management; rescue emergency plans for remote areas in Belize Reef or Southern Belize, First Aid and medical assistance, annual emergency response trainings, etc.
- Police patrol and law enforcement against criminal offenders on sea chasing and threatening tourists tour boats
 - Development guidelines, law excerpts and fines for law-breaking interactions.
 - Set out policies and strong law enforcement on e.g. maximum speed, maximum boat size and depth, regulation of fishing methods, species and fishing periods.
 - Development of a search and rescue mechanism and task team force prepared to respond to product specific emergency rescue missions, such as search for lost boats, or emergency rescue for boats on fire, etc.
- **Project 3. Integrated Quality Management system.** Development of best practice guidelines for nautical tourism operators for a voluntary adhesion to the national IQM system.

Lead Responsible	Strategic Partners
BTB (product development) Ministry of Tourism	Coastal Zone Management – Authority & Institute Ministry of Foreign Affairs - Ministry of Immigration Ministry of Police and Public Safety Ministry of Transport, Communications and National Emergency Management Friends of Conservation and Development
Destinations for implementation	
Central Coast Belize, Northern Islands, Belize Reef, Southern Belize	
Estimated cost (USD)	Potential financing sources
USD 2,160,000	BTB Ministry of Police and Public Safety Coastal Zone Management – Authority & Institute

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1.5.5 Sub-program for Capacity Building of Nautical Tourism

Description and Projects		Time frame
<p>The sub-program for the development capacity building modules and trainings for stakeholders involved in the tourism activities (or tourism related activities) of the Nautical tourism product include opportunities offered by the Belize Marine & Sailing Club Network/Association's members or demand-driven training modules at national training institutions. Both possibilities should include self-financing mechanisms.</p> <ul style="list-style-type: none"> ▶ Project 1. Continuous training for nautical tourism services. Development of different tourism and tourism product related training programs required by Nautical Tourism operational and management staff to enhance their skills and performance and hence to enhance the customer's experience at the destinations. <ul style="list-style-type: none"> • Skippers, captains, cooks, and other crew personnel • Boat restoration • Yacht and sailing boat mechanics and maintenance • Sales techniques for members and their management staff • First Aid assistance on land and on open waters especially for sports and water-based injuries • Lifeguards • Foreign language courses ▶ Project 2. Specific boat services training. This project develops SME support in developing opportunities to provide services to the boats and passengers arriving at Belize's nautical tourism destinations and include training modules on: <ul style="list-style-type: none"> • Waste disposal services • Logistics (food supplies and passenger luggage) • Immigration and customs • Boat mechanics maintenance services • Training for personnel involved in radio communication with the boats 		<p>Project 1: Starting date: 2015 Implementation: 1 year Duration: continuous</p> <p>Project 2: Starting date: 2016 Implementation: 1 year Duration: continuous</p>
Lead Responsible		Strategic Partners
Belize Marine & Sailing Club Network/Association BTB (product development)		BTB (quality development) Beltraide – Ministry of Economic Development National Training Institution (university, vocational training centers) BTIA Coastal Zone Management - Authority & Institute
Destinations for implementation		
Central Coast Belize, Northern Islands, South Eastern Coast Belize, Southern Belize, Belize Reef		
Estimated cost (USD)		Potential financing sources
USD 3,280,000		Private sector Student fees

1.5.6 Sub-program for Sustainability of Nautical Tourism

Description and Projects		Time frame
<p>The sub-program for the long-term sustainability of Nautical Tourism development designs mechanisms to assure that the social safe guards and the land/ecosystem's protection, conservation and economic development requirements are met.</p> <ul style="list-style-type: none"> ▶ Project 1. Nautical tourism area use plan. The plan will structure Belize's nautical tourism area use plan by identifying: <ul style="list-style-type: none"> • Specific channels and maritime routes for specific vessels types (according to their size and function) in order to approach Belize's waters and nautical tourism destinations without harming the reef and other ecosystems • Mapping of mooring buoys, vessel speed limits, restrictions per area (sensitive area / fragility of eco-system analysis) • Specific criteria for the development of nautical tourism anchorage areas, embarking and disembarking areas, land development categories and criteria, concept and styles. • Specific transportation and logistics areas on land in order to provide a sustainable structure for the path to and from the destination and tourism assets • Specific areas for shopping and vendors to provide possibilities for local inclusion and promote economic growth • Specific areas to carry out boating maintenance and logistic activities such as waste discharging and water provisioning to avoid the possibility of boats discharging waste into the open waters • Develop environmental and social safeguards related to nautical tourism ▶ Project 2. Nautical tourism asset management and conservation. This project defines nautical tourism safeguarding instruments that should be considered when developing and operating nautical tourism in Belize. <ul style="list-style-type: none"> • <i>A priori</i> assessment of: <ul style="list-style-type: none"> iii. Identification and mapping of tourism resources iv. Identification of environment/ecosystem and social issues in destinations where nautical sports and activities are planned to be undertaken. v. Identification and assessment of the vulnerability of nautical tourism and its utilized resources, • The development of limits of change indicators, responsibilities and roles for monitoring, reporting and communication processes to create a set of offensive and defensive strategies, which will help to maintain sustainable and structured development of the tourism product. • Monitoring of environmental and social changes caused by nautical tourism and development of rehabilitation and degradation activities ▶ Project 3. Nautical tourism inclusion mechanisms. Identification and activation of mechanisms adapted for the Belize destination's reality to reduce support poverty reduction by including communities and their economic initiatives providing employment opportunities to citizens, micro-enterprise and opportunities to become suppliers to the nautical tourism industry and develop philanthropic initiatives. <ul style="list-style-type: none"> • To reduce poverty through nautical tourism by creating jobs and employment, e.g. inclusion of fishermen activities and sport fishing, navigation, cooking, mechanics, etc. • To reduce poverty by providing opportunities for local service and goods suppliers 		<p>Project 1: Starting date: 2014 in South Eastern Coast Belize 2015 in Central Coast Belize 2015 in Northern Islands 2020 in Belize Reef 2026 Southern Belize Total: 11 years</p> <p>Project 2: Starting date: 2015 in South Eastern Coast Belize 2016 in Central Coast Belize 2016 in Northern Islands 2020 in Belize Reef 2026 Southern Belize Duration: continuous</p> <p>Project 3: Starting date: 2014 in South Eastern Coast Belize 2017 in Central Coast Belize 2017 in Northern Islands 2021 in Belize Reef 2027 Southern Belize Duration: continuous</p>
Lead Responsible		Strategic Partners
BTB (product development) Belize Marine & Sailing Club Network/Association		Local NGOs Coastal Zone Management – Authority & Institute NSTTF Healthy Reef Friends of Conservation and Development

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1.5.6 Sub-program for Sustainability of Nautical Tourism

	PACT
Destinations for implementation	
Central Coast Belize, Northern Islands, South Eastern Coast Belize, Southern Belize, Belize Reef	
Estimated cost (USD)	Potential financing sources
USD 3,450,000	Coastal Zone Management – Authority & Institute NSTTF Local NGOs PACT

1.5.7 Sub-program for Governance of Nautical Tourism

Description and Projects	Time frame
<p>The sub-program for the legislation amendments of Nautical tourism focuses on the existing Coastal Zone Management Act and other or new legislative regulations and regulatory frameworks that govern the safety and sustainability of Belize's waters and nautical tourism destinations.</p> <ul style="list-style-type: none"> ▶ Project 1. Strengthening of entities. This project highlights the new organizations/entities that will be created during the implementation of the Program for Nautical Tourism Development. <ul style="list-style-type: none"> • Belize Marine & Sailing Club Network/Association. An umbrella organization providing product and service standardization, joint marketing and promotional activities and undertakes lobbying activities representing the interests of its members marine & sailing clubs. ▶ Project 2. Regulations, norms and law development for nautical tourism. This project amends existing Act or develops new regulative frameworks to incorporate product-specific laws for each component of the nautical tourism value chain aiming at enhancing and improving the Nautical Tourism offer and destinations where it takes place. Hence the act could include regulatory articles on areas such as: <ul style="list-style-type: none"> • New cross-border arrangements to enhance the accessibility of Belize's waters • Police patrol and law enforcement against criminal offenders on sea chasing and threatening tourists tour boats • Set out policies and strong law enforcement on e.g. maximum speed, maximum boat size and depth, regulation of fishing methods, species and fishing periods. • Deployment of Coastal guards and enforcement of regulations in order to protect and avoid damage to the fragile ecosystem of the coastal waters of Belize. 	<p>Project 1: Starting date: 2017 Implementation: 1 year</p> <p>Project 2: Starting date: 2016 Implementation: 1 year</p>
Lead Responsible	Strategic Partners
BTB (product development)	Ministry of Tourism BTIA Coastal Zone Management – Authority and Institute Ministry of Police and Public Safety Ministry of Foreign Affairs Ministry of Defense and Immigration Universities and scholars
Destinations for implementation	
Nationwide Belize coastal waters and reefs	
Estimated cost (USD)	Potential financing sources
USD 190,000	Ministry of Tourism Ministry of Police and Public Safety Coastal Zone Management – Authority and Institute

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1.5.8 Nautical Tourism Product Development Macro Program Implementation Schedule

Project/Year	2012	2013	2014	2015	2016	2017	2018	2019	2020
Program for Nautical Tourism Development	-	-	-	-	-	-	-	-	-
Sub-program for Business & Product Development of Nautical Tourism									
Project 1: Integral Marinas Destinations Development									
Sub-program for Infrastructure and Accessibility of Nautical tourism									
Project 1: Boat accessibility and natural routes									
Project 2: Land infrastructure and systems for Nautical Tourism									
Project 3: Support services for visitors on marinas and other on-shore docking locations dedicated to tourism									
Project 4: Boat service development									
Sub-program for Marketing and Awareness of Nautical Tourism									
Project 1: Belize Marine & Sailing Club Brand									
Project 2: Belize Marine & Sailing Club Network/Association									
Project 3: Promotion, communication & PR									
Project 4: Product specific awareness development									
Sub-program for Standards and Safety & Security Assurance of Nautical Tourism									
Project 1: Operational standards and guidelines for Nautical Tourism									
Project 2: Safety & security for nautical tourism									
Project 3: Integrated Quality Management system									
Sub-program for Capacity Building of Nautical Tourism									
Project 1: Continuous training for nautical tourism services									
Project 2: Specific boat services training									
Sub-program for Sustainability of Nautical Tourism									
Project 1: Nautical tourism area use plan									
Project 2: Nautical tourism asset management and conservation									
Project 3: Nautical tourism inclusion mechanisms									
Sub-program for Governance of Nautical Tourism									
Project 1: Strengthening of entities									
Project 2: Regulations, norms and law development for nautical tourism									

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Project/Year	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Program for Nautical Tourism Development	-	-	-	-	-	-	-	-	-	-
Sub-program for Business & Product Development of Nautical Tourism										
Project 1: Integral Marinas Destinations Development										
Sub-program for Infrastructure and Accessibility of Nautical tourism										
Project 1: Boat accessibility and natural routes										
Project 2: Land infrastructure and systems for Nautical Tourism										
Project 3: Support services for visitors on marinas and other on-shore docking locations dedicated to tourism										
Project 4: Boat service development										
Sub-program for Marketing and Awareness of Nautical Tourism										
Project 1: Belize Marine & Sailing Club Brand										
Project 2: Belize Marine & Sailing Club Network/Association										
Project 3: Promotion, communication & PR										
Project 4: Product specific awareness development										
Sub-program for Standards and Safety & Security Assurance of Nautical Tourism										
Project 1: Operational standards and guidelines for Nautical Tourism										
Project 2: Safety & security for nautical tourism										
Project 3: Integrated Quality Management system										
Sub-program for Capacity Building of Nautical Tourism										
Project 1: Continuous training for nautical tourism services										
Project 2: Specific boat services training										
Sub-program for Sustainability of Nautical Tourism										
Project 1: Nautical tourism area use plan										
Project 2: Nautical tourism asset management and conservation										
Project 3: Nautical tourism inclusion mechanisms										
Sub-program for Governance of Nautical Tourism										
Project 1: Strengthening of entities										
Project 2: Regulations, norms and law development for nautical tourism										

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1.5.9 Nautical Tourism Product Development Macro Program Cost Model

Project/Year	Total (US\$)	2012	2013	2014	2015	2016	2017	2018	2019	2020
Program for Nautical Tourism Development	44,270,000	700,000	700,000	800,000	2,340,000	4,400,000	4,940,000	4,080,000	3,280,000	4,130,000
Sub-program for Business & Product Development of Nautical Tourism	9,800,000	700,000	700,000	300,000	-	1,300,000	1,600,000	1,300,000	600,000	1,500,000
Project 1: Integral Marinas Destinations Development	800,000	400,000	400,000							
Project 2: Nautical Tourism in South Eastern Coast Belize	1,800,000	300,000	300,000	300,000			300,000	300,000	300,000	
Project 3: Nautical Tourism in Central Coast Belize	2,100,000					700,000	700,000	700,000		
Project 4: Nautical Tourism in Northern Islands	2,100,000					600,000	600,000	300,000	300,000	300,000
Project 5: Nautical Tourism in Belize Reef	1,350,000									600,000
Project 6: Nautical Tourism in Southern Belize	1,650,000									600,000
Sub-program for Infrastructure and Accessibility of Nautical tourism	18,530,000	-	-	-	1,400,000	2,200,000	2,250,000	1,730,000	1,630,000	1,630,000
Project 1: Boat accessibility	200,000				100,000	100,000				
Project 2: Land infrastructure and systems for Nautical Tourism	13,100,000				1,300,000	1,300,000	1,300,000	1,300,000	1,300,000	1,300,000
Project 3: Support services for visitors on marinas and other tourism on-shore dockings	4,330,000					800,000	800,000	280,000	280,000	280,000
Project 4: Boat service development	900,000						150,000	150,000	50,000	50,000
Sub-program for Marketing and Awareness of Nautical Tourism	6,860,000	-	-	-	110,000	60,000	360,000	360,000	360,000	360,000
Project 1: Belize Marine & Sailing Club Brand	50,000				50,000					
Project 2: Nautical Tourism product club	2,250,000									
Project 3: Promotion, communication & PR	4,200,000						300,000	300,000	300,000	300,000
Project 4: Product specific awareness development	360,000				60,000	60,000	60,000	60,000	60,000	60,000
Sub-program for Standards and Safety & Security Assurance of Nautical Tourism	2,160,000	-	-	-	150,000	200,000	200,000	200,000	200,000	150,000
Project 1: Operational standards and guidelines for Nautical Tourism	350,000				150,000	50,000	50,000	50,000	50,000	
Project 2: Safety & security for nautical tourism	1,450,000					150,000	150,000	150,000	150,000	150,000
Project 3: Integrated Quality Management system	360,000									
Sub-program for Capacity Building of Nautical Tourism	3,280,000	-	-	-	280,000	280,000	280,000	280,000	280,000	280,000
Project 1: Continuous training for nautical tourism services	960,000				60,000	60,000	60,000	60,000	60,000	60,000
Project 2: Specific boat services training	2,320,000				220,000	220,000	220,000	220,000	220,000	220,000
Sub-program for Sustainability of Nautical Tourism	3,450,000	-	-	500,000	400,000	210,000	210,000	210,000	210,000	210,000
Project 1: Nautical tourism area use plan	1,400,000			400,000	100,000	100,000	100,000	100,000	100,000	100,000
Project 2: Nautical tourism asset management and conservation	1,150,000				250,000	60,000	60,000	60,000	60,000	60,000
Project 3: Nautical tourism inclusion mechanisms	900,000			100,000	50,000	50,000	50,000	50,000	50,000	50,000
Sub-program for Governance of Nautical Tourism	190,000	-	-	-	-	150,000	40,000	-	-	-
Project 1: Strengthening of entities	40,000						40,000			
Project 1: Regulations, norms and law development for nautical tourism	150,000					150,000				
TOTAL BUDGET NAUTICAL MACRO PROGRAM	44,270,000	700,000	700,000	800,000	2,340,000	4,400,000	4,940,000	4,080,000	3,280,000	4,130,000

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Project/Year	Total (US\$)	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Program for Nautical Tourism Development	44,270,000	3,000,000	2,640,000	2,640,000	2,360,000	1,910,000	1,910,000	1,110,000	1,110,000	1,110,000	1,110,000
Sub-program for Business & Product Development of Nautical Tourism	9,800,000	600,000	450,000	450,000	300,000	-	-	-	-	-	-
Project 1: Integral Marinas Destinations Development	800,000										
Project 2: Nautical Tourism in South Eastern Coast Belize	1,800,000										
Project 3: Nautical Tourism in Central Coast Belize	2,100,000										
Project 4: Nautical Tourism in Northern Islands	2,100,000										
Project 5: Nautical Tourism in Belize Reef	1,350,000	300,000	150,000	150,000	150,000						
Project 6: Nautical Tourism in Southern Belize	1,650,000	300,000	300,000	300,000	150,000						
Sub-program for Infrastructure and Accessibility of Nautical tourism	18,530,000	1,630,000	1,130,000	1,130,000	1,000,000	1,000,000	1,000,000	200,000	200,000	200,000	200,000
Project 1: Boat accessibility	200,000										
Project 2: Land infrastructure and systems for Nautical Tourism	13,100,000	1,300,000	800,000	800,000	800,000	800,000	800,000				
Project 3: Support services for visitors on marinas and other tourism on-shore dockings	4,330,000	280,000	280,000	280,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000
Project 4: Boat service development	900,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000
Sub-program for Marketing and Awareness of Nautical Tourism	6,860,000	300,000	550,000	550,000	550,000	550,000	550,000	550,000	550,000	550,000	550,000
Project 1: Belize Marine & Sailing Club Brand	50,000										
Project 2: Nautical Tourism product club	2,250,000		250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000	250,000
Project 3: Promotion, communication & PR	4,200,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000
Project 4: Product specific awareness development	360,000										
Sub-program for Standards and Safety & Security Assurance of Nautical Tourism	2,160,000	100,000	140,000	140,000	140,000	90,000	90,000	90,000	90,000	90,000	90,000
Project 1: Operational standards and guidelines for Nautical Tourism	350,000										
Project 2: Safety & security for nautical tourism	1,450,000	100,000	100,000	100,000	100,000	50,000	50,000	50,000	50,000	50,000	50,000
Project 3: Integrated Quality Management system	360,000		40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000
Sub-program for Capacity Building of Nautical Tourism	3,280,000	160,000	160,000	160,000	160,000	160,000	160,000	160,000	160,000	160,000	160,000
Project 1: Continuous training for nautical tourism services	960,000	60,000	60,000	60,000	60,000	60,000	60,000	60,000	60,000	60,000	60,000
Project 2: Specific boat services training	2,320,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
Sub-program for Sustainability of Nautical Tourism	3,450,000	210,000	210,000	210,000	210,000	110,000	110,000	110,000	110,000	110,000	110,000
Project 1: Nautical tourism area use plan	1,400,000	100,000	100,000	100,000	100,000						
Project 2: Nautical tourism asset management and conservation	1,150,000	60,000	60,000	60,000	60,000	60,000	60,000	60,000	60,000	60,000	60,000
Project 3: Nautical tourism inclusion mechanisms	900,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000
Sub-program for Governance of Nautical Tourism	190,000	-	-	-	-	-	-	-	-	-	-
Project 1: Strengthening of entities	40,000										
Project 1: Regulations, norms and law development for nautical tourism	150,000										
TOTAL BUDGET NAUTICAL MACRO PROGRAM	44,270,000	3,000,000	2,640,000	2,640,000	2,360,000	1,910,000	1,910,000	1,110,000	1,110,000	1,110,000	1,110,000

1.6 Program for Leisure and Entertainment Tourism Development

Product Concept

Leisure & Entertainment Tourism caters for a relatively young breed of tourist, seeking escapism, entertainment and fun. Time may be limited, but disposable income levels are high. Relative levels of comfort and security are sought, but a thrill-seeking disposition may motivate the tourist to look for diverse experiences. The shopping areas in Belize should be structured as open air village providing customers with international shopping brands.

This tourism product may include activities and services such as:

- ▶ Visiting themed attractions, edutainment facilities and activities or
- ▶ Brand names shopping possibilities, restaurants, cafes, bars, and recreational activities such as cinemas, leisure parks, entertainment shows, etc.

Gaps identified – Diagnostic

- ▶ Lack of leisure activities supply at national level.
- ▶ Existing Free Trade Zone in Corozal District results causing negative effects such as alcohol and drug abuse, prostitution and degradation of the image of the destination and its inhabitants.
- ▶ Lack of public spaces where leisure activities such as restaurants, bars and special events could take place. Strong need to develop entertainment and leisure services.
- ▶ Non-existence of proper leisure services in Belize City, such as shopping malls, entertainment complexes, theme parks, etc. that would clearly diversify tourism supply in Belize especially for cruise visitors.

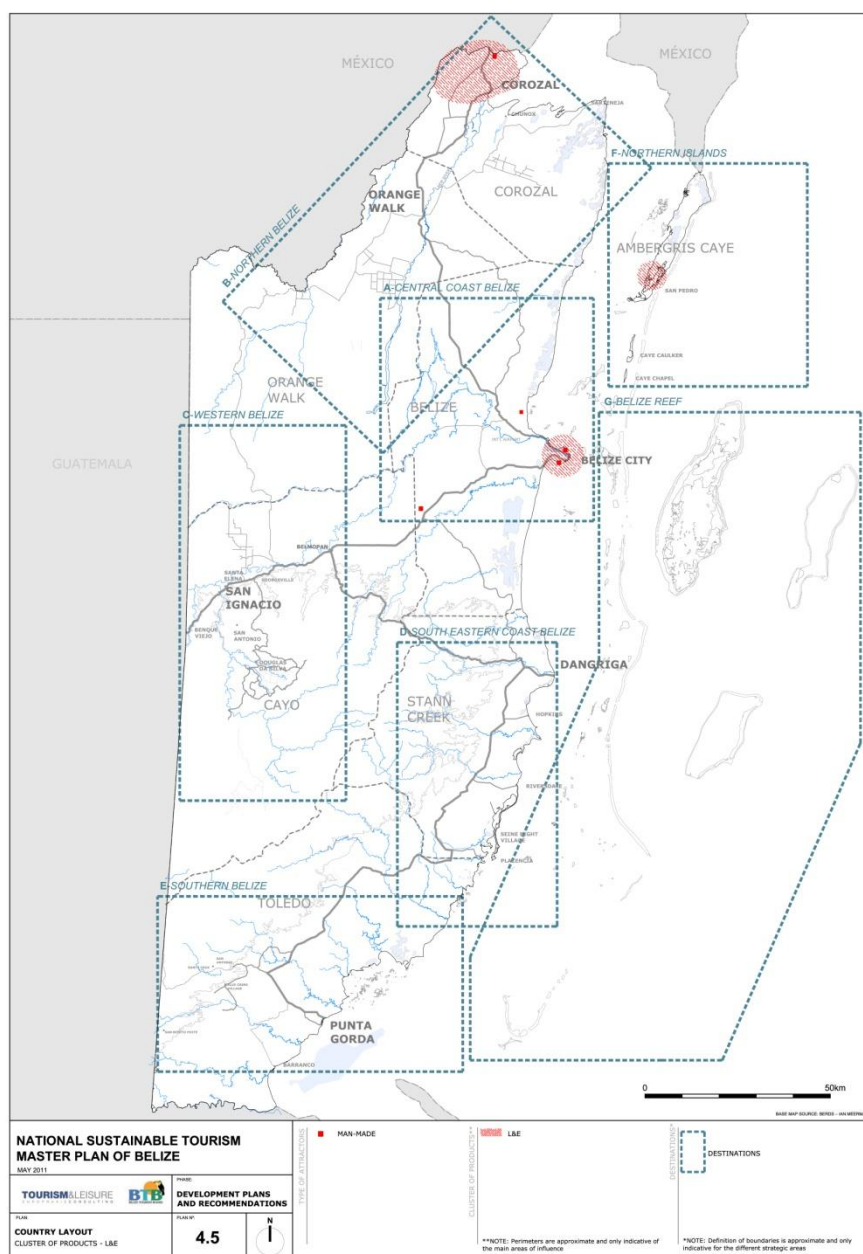
Vision Leisure & Entertainment Tourism 2030

Leisure & Entertainment will be focused on developing the Leisure & Entertainment Area in Northern Belize by offering a mid-high quality product composed of shopping, leisure facilities and other value added services. Furthermore, the L&E concept will be adapted to be established in Central Coast Belize (Belize City) and Northern Islands (San Pedro) to cater to international tourist expectations.

Leisure & Entertainment tourism destinations and product development

The map depicts areas where Leisure & Entertainment tourism should be enhanced and/or developed: Northern Belize, Northern Islands and Central Coast Belize. Based on the current and potential competitiveness, importance and attractiveness of its existing asset, Northern Belize's leisure & entertainment tourism product has the potential to become the main tourism product and hence to act as a main tourist attractor for arrivals to the destinations. In Central Coast Belize and Northern Islands leisure & entertainment tourism will be regarded as a secondary tourism product.

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Source: T&L

Although **Central Coast Belize** and **Northern Islands** already provide visitors with diverse shopping and entertainment activities and receives up to 1 million visitors a year, the offering is not structured as a tourism product, meaning that it does not actively stimulate arrivals to the destinations. However, in order to change that, the product offering will have to be restructured by master planning the product, including concept design (open air shopping area, Caribbean village town character, etc.) and promotion of the destinations as an attractive shopping and entertainment area hosting international brands of interest to attract demand.

Northern Belize's leisure and entertainment development will start its development by 2018 and include a restructuring of the Free Trade Zone in order to increase its benefits from tourism. This will include a new master planning of the destination as an integrated destination for leisure and entertainment tourism, the creation of a new destination image and the investment into new facilities and services to diversify the offer and adapt it to the kind of tourism desired.

As described above, the graph below illustrates the product development phases by destination:

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		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Central Coast Belize	Leisure and Entertainment																				
Northern Islands	Leisure and Entertainment																				
Northern Belize	Leisure and Entertainment																				

Description of the program

The Leisure and Entertainment Tourism Development Program is focused on structuring the destination as an attractive shopping and entertainment point for Belizeans, regional visitors and international foreigners.

The program therefore prepares the development of the Leisure and Entertainment Area including its infrastructural developments (such as the development of further basic services/infrastructures, hotels, etc.) and amendments in order to increase its accessibility from main market sources (including improved cross-border arrangements for foreign visitors to Northern Belize). Furthermore, the program assures the provision of sufficient basic services, strengthens a management agency as a self-efficient and self-financing institution, and increases and upgrades visitor's experience in the destination.

The Program for Leisure & Entertainment Tourism Development is to develop one project for the business & product development, namely:

- ▶ **Belize National Leisure Area Development** which will conceptualize each destination's tourism product business model and develop the master planning and land use framework. In addition, the project develops offering memorandums to search for potential investors and operators.

Lead stakeholders

BTB's Leisure & Entertainment Product Manager should interact with the Ministry for Urban Development and the Ministry of Works to conceptualize, design and master plan the development of the specific areas. To complete the search for investors, Beltraide and the Ministry of Economic Development would act as strategic partners. In partnership with the Ministry of Police and Public Safety and the Border Management Agency specific and safe cross-border agreement can be identified and implemented.

Objectives

The Belize 2030 objectives of the Leisure & Entertainment Tourism Development Program are:

- ▶ To attract new or existing regional market segments by upgrading and optimizing Northern Belize tourism opportunities as a high level leisure destination and to use Leisure & Entertainment Tourism as leverage to promote cultural and nature-based tourism in Northern Belize.
- ▶ To diversify Belize's tourism offering by providing tourists in Central Coast Belize and Northern Islands with a complementary tourism product
- ▶ To enhance the satisfaction level for locals (civil, private sector) and tourists with the safety measures, tourism services and product offered at leisure and entertainment areas
- ▶ To increase local participation and reduce poverty by using leisure and entertainment tourism as a pro-poor tourism tool and implement pro-poor participation mechanisms.

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Milestones

Review Years	Milestones
2015	<ul style="list-style-type: none"> ▶ No project in progress
2020	<ul style="list-style-type: none"> ▶ Definition of the rules and regulations of the Leisure and Entertainment Tourism as well as the creation of new entities in charge of the tourism branch ▶ Development of the Belize National Leisure Area ▶ Improvement of the destination accessibility and basic services ▶ Design of the Belize Leisure and Entertainment Tourism Brand ▶ Launch of the promotion, communication and PR campaign ▶ Implementation of the awareness program ▶ Definition of the operational guidelines and standards for Leisure and Entertainment Tourism to prevent social conflict ▶ Creation of the Integrated Quality Management System ▶ Implementation of a continuous training for Leisure and Entertainment Tourism ▶ Definition of the Belize National Leisure Area Use Plan
2025	<ul style="list-style-type: none"> ▶ Launch of the Leisure and Entertainment Tourism Product Club ▶ Creation of the Leisure and Entertainment Tourism asset management and conservation system ▶ Second phase of the inclusion mechanisms
2030	<ul style="list-style-type: none"> ▶ Third phase of the inclusion mechanisms ▶ Continuous management of the Leisure and Entertainment Area

Proposed subprograms and projects

1.6.1 Sub-program for Business & Product Development for Leisure and Entertainment Tourism	
Description and Projects	Time frame
<ul style="list-style-type: none"> ▶ Project 1: Belize National Leisure Area Development. Northern Belize is the primary destination for L&E development, and as secondary tourism product and in a much smaller scale in Belize City and in San Pedro. These developments will require: <ul style="list-style-type: none"> • Destination Concept development • A market and feasibility study providing information on the potential market segments that will be targeted and hence how the products will be conceptualized and offered. • Based on the demand analysis, define a business model of each Leisure and Entertainment area and tourism destination that presents a mix of activities, attractions and services. Possible product components present in the Leisure and Entertainment Area: casino, hotels, open air shopping, restaurants, entertainment premises (children parks, street performances, theatres, cinemas, etc), pedestrian areas, parks, green zones, etc. • Specific laws and regulation according to Belize's land policy and operational guidelines. • Master planning for each specific area: including all its different tourism services and activities and its basic services and infrastructures, such as land plots dedicated to the retail shopping area/restaurants/roads/entertainment area/commercial centers, etc. Followed by the execution of construction and the operational phase. • Development of Offering Memorandums in order to inform potential investors 	<p>Project 1: Starting date: 2020 Implementation: continuous</p>

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1.6.1 Sub-program for Business & Product Development for Leisure and Entertainment Tourism

on the possibilities at each Leisure & Entertainment Area and state the objectives, business opportunities and terms of investment. Investor/Operator research (or search for international brands or retailers) and negotiations. Negotiation and contracting of developers and operators	
Lead Responsible	Strategic Partners
BTB (product development)	Commercial Free Zone Management Agency / Leisure and Entertainment Area Management Agency NSTTF Ministry of Housing and Urban Development Developers, operators, investors (national and international) Beltraide, Ministry of Economic Development
Destinations for implementation	
Primary Leisure & Entertainment Area Development: Northern Belize Secondary Leisure & Entertainment Area Development: Belize City and San Pedro	
Estimated cost (USD)	Potential financing sources
USD 18,500,000	NSTTF Ministry of Economic Development, Beltraide Municipality of Corozal BTIA National and international investors, operators IADB, World Bank

1.6.2 Sub-program for Infrastructure and Accessibility of Leisure and Entertainment Tourism

Description and Projects	Time frame
<p>The sub-program for the development of the Leisure and Entertainment infrastructure will include a planning phase to structure the destination as an integrated system of leisure activities (such as casinos, restaurants, bars, entertainment facilities), accommodations, shopping malls and retail shops. Access possibilities and means of transportation could be themed or structured in an attractive and product-specific way.</p> <ul style="list-style-type: none"> ▶ Project 1. Accessibility to the destination. In order to attract day visitors and tourists to the destination, the accessibility to the Leisure and Entertainment areas must be ensured by developing different transport infrastructures and connections. <ul style="list-style-type: none"> • Sea accessibility <ol style="list-style-type: none"> i. Sea route from Mexico and Belize City and San Pedro connections and frequencies ii. Leisure & Entertainment Shuttle Boat using Rio Hondo as access to the area including a themed departure and arrival terminal/pier and a transportation system to the Leisure & Entertainment area. E.g. by providing specific designed themed boats, an attractive shopping terminal at the destination, etc. iii. Enforced police patrol and law on sea and along Rio Hondo when providing direct sea routes from and to the Leisure and Entertainment Area • Land accessibility: <ol style="list-style-type: none"> i. Improved road conditions between Mexico and the Leisure & Entertainment area, with the highway structured as a highway in order to target tourists/day visitors using the access road from Mexico ii. Improved road conditions between Corozal Town and the Leisure & 	<p>Project 1: Starting date: 2020 Duration: 15 years</p> <p>Project 2: Starting date: 2018 Duration: continuous</p>

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1.6.2 Sub-program for Infrastructure and Accessibility of Leisure and Entertainment Tourism

<p>Entertainment area to enhance access for residents and employees.</p> <p>iii. Improved safety and lighting conditions on the road</p> <p>iv. Improved road conditions between Belize City and the Leisure & Entertainment area, with the highway structured as a highway in order to target visitors/cruise passengers and offer the Leisure & Entertainment area as an attractive day excursion.</p> <p>v. Improved guidance and security to the Leisure and Entertainment Area by creating specific road signage and traffic lights located at strategic points.</p> <p>vi. Bus services from the airport to the Leisure and Entertainment areas and to e.g. themed shopping buses from Corozal Town, Belize City and Belmopan.</p> <p>vii. Improved pedestrian sidewalks through the Leisure and Entertainment Zones.</p> <p>► Project 2. Basic services consolidation. The project requires assessments of the required infrastructure services in order to cater to basic needs and hence offer Leisure & Entertainment facilities and services.</p> <ul style="list-style-type: none"> • Ensure a functioning garbage collection management, waste treatment plants • Guarantee sufficient energy • Provide sufficient potable water supply • Enhance telecommunications and banking services according to the destination's needs 	
Lead Responsible	Strategic Partners
BTB (product development)	NSTTF Ministry of Works Ministry of Economic Development, Beltraide Ministry of Housing and Urban Development Ministry of Public Utilities, Transport & Communication BTIA, BHA Corozal Municipality Free Trade Zone Authority
Destinations for implementation	
Primary Leisure & Entertainment Area Development: Northern Belize Secondary Leisure & Entertainment Area Development: Belize City and San Pedro	
Estimated cost (USD)	Potential financing sources
USD 29,000,000	NSTTF, IADB, World Bank, Private sector, Ministry of Public Utilities, Ministry of Works

1.6.3 Sub-program for Marketing and Awareness of Leisure and Entertainment Tourism

Description and Projects	Time frame
<p>The sub-program of the operational marketing development for the Leisure and Entertainment includes the development of a national Leisure and Entertainment brand and its sub-brands targeting different market-segments. Both the national and the sub-brands could be operated and communicated by BTB and BTB's Leisure and Entertainment product manager. In addition to the branding, marketing, promotion and communication tasks, BTB will work on structuring the product into a society understanding and utilizing the benefits of the product's development by creating specific awareness and information campaigns.</p> <p>► Project 1. Belize Leisure and Entertainment Tourism Brands. Development of a Leisure and Entertainment Tourism umbrella brand in accordance with BTB's strategy and creating sub-brands using commercial group typologies to target</p>	<p>Project 1: Starting date: 2020 Implementation: 1 year</p> <p>Project 2: Starting date: 2024 Duration: continuous</p>

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1.6.3 Sub-program for Marketing and Awareness of Leisure and Entertainment Tourism

<p>specific lifestyle segments e.g. luxury, outlets, sports, jewelry, garments, children, gambling, etc. Development of commercial brands for selected leisure and entertainment tourism products</p>	
<p>▶ Project 2. Leisure and Entertainment Tourism product club. Establishment of the Leisure and Entertainment tourism clubs to structure the product for different market segments. E.g. conventional shopping tourism, luxury shopping tourism, gaming tourism, leisure activities, etc.</p>	<p>Project 3: Starting date: 2020 Duration: continuous</p>
<p>▶ Project 3. Promotion, communication & PR.</p> <ul style="list-style-type: none"> • Development of a specific Leisure & Entertainment Tourism web-page on BTB's web-site • Development of marketing collaterals (such as sales brochures and other printed product information including brochures introducing the Leisure & Entertainment area and the surrounding tourism offer in Northern Belize by offering attractive day activities, visual aids used in sales presentations, web content, sales guides) • Development of an annual marketing plan (including FAM trips, media usage, publishing, direct marketing and others to the targeted markets and segments) • Development of marketing kits and promotional items and give-aways. 	<p>Project 4: Starting date: 2020 Duration: continuous</p>
<p>▶ Project 4. Product specific awareness development. Development of awareness campaigns for the leisure & entertainment tourism stakeholders and other parties affected by the product's development.</p> <ul style="list-style-type: none"> • Development of awareness campaigns for citizens in the wider buffer areas so that they understand the potential positive effects of Leisure and Entertainment tourism, including possible activities for participation and raising awareness and information level on programs to prevent its negative effects. • Product specific awareness. Development of awareness programs and campaigns considering specific risks related to the development of Leisure and Entertainment tourism in Corozal. Therefore there should be prevention of drug abuse, prostitution, alcohol and gambling addiction for visitors, tourists, employees and residents, and any other group that may be affected by the development of the Leisure and Entertainment Area. 	
Lead Responsible	Strategic Partners
BTB (product management)	BTIA Operators of the Leisure and Entertainment Area Tourism Incoming Agencies Tourist Information Centers / Welcome Centers
Destinations for implementation	
Primary Leisure & Entertainment Area Development: Northern Belize	
Secondary Leisure & Entertainment Area Development: Belize City and San Pedro	
Estimated cost (USD)	Potential financing sources
USD 10,340,000	Leisure and Entertainment Management Fee BTB tourism product marketing and promotion

1.6.4 Sub-program for Standards and Safety & Security Assurance of Leisure and Entertainment Tourism

Description and Projects	Time frame
<p>The sub-program for the safety and security development of Leisure and Entertainment tourism focuses on operational guidelines to prevent social conflicts arising from Corozal's Leisure and Entertainment Area. It consists of developing strategies, laws, law enforcement and preventive/reactive mechanisms to enhance the visitor's safety, security and experience.</p> <ul style="list-style-type: none"> ▶ Project 1. Operational guidelines and standards for Leisure and Entertainment tourism to prevent social conflicts. This project will structure the leisure and entertainment tourism product into an integrated system of safety and security standards and guidelines. These guidelines should become a statute by introducing them into the Commercial Zone Act or any new legislative act that may be necessary to be developed for the Leisure and Entertainment Area. <ul style="list-style-type: none"> • Developing codes of conducts to develop appropriate behavior at the Leisure and Entertainment Area of tourists, employees, visitors, operators, citizens and other people related to the Leisure and Entertainment Area and tourism product. • Operational guidelines for the area's maintenance, aimed at the area's commercial operators and professional services agencies/companies. • Development of specific programs to reduce international border issues/criminality e.g. corruption of boarder officers, human and drug trafficking, immigration corruption, etc. ▶ Project 2. Safety & security for Leisure and Entertainment tourism. Development of specific emergency management plans reducing the potential harm/damage caused by the crisis. <ul style="list-style-type: none"> • Install traffic lights and road lights at the Leisure and Entertainment Area • Police stations in the area and services offered by the Tourism Police Unit to assist tourists requiring help and assistance • Development of specific risk management plans for Leisure & Entertainment tourism sites and operators, including incidents resulting from flooding, hurricanes, fires, robberies, shootings, mass-panic and other emergencies; • Development of facilities providing first aid and health assistance in the vicinity of the Leisure and Entertainment Area. • Develop specific programs to improve security along the international borders with Mexico and improve security checks. • Improve access / border crossing for visitors interested in consuming Belizean tourism products by benchmarking different cross-border arrangement opportunities. • Development of a search and rescue mechanism and task team force prepared to respond to product specific emergency rescue missions, such as search for lost visitors/child in the area. • Enforced police patrol and law enforcement on sea and along Rio Hondo when providing direct sea routes from and to the Leisure and Entertainment Area • Set policies and strong law enforcement on e.g. visit age limits, alcohol and drug consumption, prostitution and human trafficking. ▶ Project 3. Integrated Quality Management system. Development of best practice guidelines for leisure and entertainment tourism operators for a voluntary adhesion to the national IQM system. 	<p>Project 1: Starting date: 2020 Implementation: 4 years</p> <p>Project 2: Starting date: 2020 Duration: continuous</p> <p>Project 3: Starting date: 2022 Duration: continuous</p>
Lead Responsible	Strategic Partners
BTB Ministry of Tourism	Ministry of Police and Public Safety BTB (product development) BTIA Corozal Town Council Border Management Agency

1.6.4 Sub-program for Standards and Safety & Security Assurance of Leisure and Entertainment Tourism

	Ministry of Foreign Affairs NEMO Ministry of National Security & Immigration
Destinations for implementation	
Primary Leisure & Entertainment Area Development: Northern Belize Secondary Leisure & Entertainment Area Development: Belize City and San Pedro	
Estimated cost (USD)	Potential financing sources
USD 2,370,000	GOB - Ministry of Police and Public Safety Leisure and Entertainment Management Fee BTB - Licensing fees

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1.6.5 Sub-program for Capacity Building of Leisure and Entertainment Tourism

Description and Projects		Time frame
<p>The sub-program for the development capacity building modules and trainings for stakeholders involved in the tourism activities (or tourism related activities) of the Leisure and Entertainment tourism product include in-house trainings or demand-driven training modules at national training institutions that should integrate self-financing mechanisms.</p> <p>▶ Project 1: Continuous training for Leisure and Entertainment operations. Development of different tourism product related training programs required by the operational and management staff of the Leisure and Entertainment Area to enhance the staff's skills and performances and hence to enhance the customer's experience at the destination.</p> <ul style="list-style-type: none">• Hospitality training: cooking, food & beverage, reception, housekeeping, maintenance, guest relations and service personnel• Sales techniques for shop assistants, personal shoppers• Language courses, especially Spanish when targeting Spanish speaking visitors such as Mexicans and Guatemalans.• Develop capacity modules for law enforcement for police officers and security guards, specific training for conflict situations related to alcohol, drugs and prostitution		<p>Project 1: Starting date: 2020 Duration: continuous</p>
Lead Responsible	Strategic Partners	
BTB (product development)	BTB (quality development) Beltraide – Ministry of Economic Development National Training Institutions (university, vocational training centers) Ministry of Economic Development BTIA, BHA Ministry of Police and Public Safety	
Destinations for implementation		
Primary Leisure & Entertainment Area Development: Northern Belize		
Secondary Leisure & Entertainment Area Development: Belize City and San Pedro		
Estimated cost (USD)	Potential financing sources	
USD 1,650,000	Leisure and Entertainment Management Fee Private business/operators of the area (in-house training) Student fees	

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1.6.6 Sub-program for Sustainability of Leisure and Entertainment Tourism

Description and Projects		Time frame
<p>The sub-program for long-term sustainability of the Leisure and Entertainment Tourism development designs mechanisms to assure that the social safe guards and the land/ecosystem's protection, conservation and economic development requirements are met.</p> <p>▶ Project 1: Belize National Leisure Area Land Use Plans. In order to enhance the sustainability of the entire Leisure and Entertainment Area, planning requires taking environmental and social aspects into consideration. To do this, the NSTTF in co-operation with the national land use policies provide support in master-planning the area and environmental feasibility studies:</p> <ul style="list-style-type: none">• Planning should identify the most appropriate areas of development and rank them by level of priority and risks associated to environmental and social impacts.• Assessment and development of environmental and social safeguards in each tourism site in order to reduce negative impacts resulting from increased tourism activity. <p>▶ Project 2. Leisure and Entertainment tourism asset management and conservation. The project defines specific tourism environmental and social safeguards that should be considered when developing the Leisure and Entertainment Area.</p> <ul style="list-style-type: none">• Hence, it requires the identification and assessment of the vulnerability of leisure and entertainment tourism,• The development indicators, responsibilities and roles for monitoring, reporting and communication processes to react with a set of offensive and defensive strategies, which will help to maintain sustainable and structured development of the tourism product and• The development of an annual monitoring and evaluation system to measure the impacts of leisure and entertainment tourism. <p>▶ Project 3. Leisure and Entertainment tourism inclusion mechanisms. Identification and activation of mechanisms adapted for the Belize destination's reality to reduce poverty through the Leisure and Entertainment Area, to involve communities and to support their economic initiatives providing employment opportunities to citizens, micro-enterprise and opportunities to become suppliers to the Leisure and Entertainment Area.</p>		<p>Project 1: Starting date: 2018 Implementation: 4 years</p> <p>Project 2: Starting date: 2025 Implementation: 1 month annually</p> <p>Project 3: Starting date: 2020 Implementation: every 5 years</p>
Lead Responsible	Strategic Partners	
BTB (product development) NSTTF	Ministry of Natural Resources and the Environment Ministry of Economic Development Local NGOs Friends of Conservation and Development PACT	
Destinations for implementation		
Primary Leisure & Entertainment Area Development: Northern Belize Secondary Leisure & Entertainment Area Development: Belize City and San Pedro		
Estimated cost (USD)	Potential financing sources	
USD 1,950,000	NSTTF Ministry of Natural Resources and the Environment Social NGOs Leisure and Entertainment Management Fee PACT Universities and scholars	

1.6.7 Sub-program for Governance of Leisure and Entertainment Tourism

Description and Projects	Time frame
<p>The sub-program for the legislation amendments of Leisure and Entertainment tourism focuses on the existing Commercial Free Zone Act and includes regulations on different tourism stakeholder involved (especially the tourism sector). Regulations could include laws on development and investment, safety and security, land use and land lease.</p> <p>Project 1. Leisure and Entertainment Area Management. This project highlights the organization/entity that should be created during the implementation of the Program for Leisure and Entertainment Tourism Development. Based on the Leisure and Entertainment business model defined, the structure requires management and operations in order to encourage visits from both domestics and foreigners. Tasks:</p> <ul style="list-style-type: none"> • Definition and responsibilities of the Leisure and Entertainment Management Agency <ul style="list-style-type: none"> i. Definition of the organizational, legal structure of the agency and operational tasks and responsibilities ii. Development of self-financing schemes such as monthly fees from the area's operators iii. Training of agency personnel • Development of marketing and promotion actions • Maintenance of the area infrastructure, landscaping, etc. • Development of safeguarding mechanisms, e.g. police officers, programs to prevent drug consumption/abuse, prostitution, awareness programs for visitors. • Development of monitoring schemes, evaluation and continuous improvement mechanism for the Leisure and Entertainment area: statistics, customer survey, policy changes, etc. • Offering of human resource training possibilities to the area's management and operational staff (either in-house or through other national training institutions/programs) <p>► Project 2. Regulations, norms and legislative development for Leisure and Entertainment tourism. This project amends the Commercial Free Zone Act including regulations on value chain components for the enhancement and improvement of Leisure and Entertainment Tourism and the area in which these take place. Hence the act could include regulatory articles on areas such as:</p> <ul style="list-style-type: none"> • Gambling conditions and fraud • Quality standards of services and goods offered • Integration of a management fee for the operation of the Leisure and Entertainment Area Management Agency to be paid from each operator selling goods and services at the Leisure and Entertainment Area. • Specific laws and regulation according to land use, and land rights etc. E.g. develop a model of land lease, sales of land rights in order to maintain Belize's territory in Belizean hands. • Enforced police patrol and law enforcement on sea and along Rio Hondo when providing direct sea routes from and to the Leisure and Entertainment Area • The operational guidelines to prevent social conflicts and enhance the areas safety and security should become a statute of the Commercial Free Zone Act or any new legislative act that may be necessary to be developed for the Leisure and Entertainment Area. Set policies and strong law enforcement on <p>iv. E.g.: visit age limits, alcohol and drug consumption, prostitution and human trafficking or other criminal activities that could harm the destination's image</p>	<p>Project 1: Starting date: 2018 Implementation: 1 year Duration: continuous</p> <p>Project 2: Starting date: 2018 Implementation: 1 year</p>

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1.6.7 Sub-program for Governance of Leisure and Entertainment Tourism

Lead Responsible	Strategic Partners
Commercial Free Zone Management Agency / Leisure and Entertainment Area Management Agency	BTB (product development) Ministry of Commerce and Industry Ministry of Finance Ministry of Tourism Universities and scholars
Destinations for implementation	
Belize National Territory	
Estimated cost (USD)	Potential financing sources
USD 800,000	Commercial Free Zone Management Agency / Leisure and Entertainment Area Management Agency

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1.6.8 Leisure and Entertainment Tourism Product Macro Program Implementation Schedule

Project/Year	2012	2013	2014	2015	2016	2017	2018	2019	2020
Program for Leisure and Entertainment Tourism Development									
Sub-program for Business & Product Development for Leisure and Entertainment Tourism									
Project 1: Belize National Leisure Area Development									
Sub-program for Infrastructure and Accessibility of Leisure and Entertainment Tourism									
Project 1: Accessibility to the destination									
Project 2: Basic services consolidation									
Sub-program for Marketing and Awareness of Leisure and Entertainment Tourism									
Project 1: Belize Leisure and Entertainment Tourism Brands									
Project 2: Leisure and Entertainment Tourism product club									
Project 3: Promotion, communication & PR									
Project 4: Product specific awareness development									
Sub-program for Standards and Safety & Security Assurance of Leisure and Entertainment Tourism									
Project 1: Operational guidelines and standards for Leisure and Entertainment tourism to prevent social conflicts									
Project 2: Safety & security for Leisure and Entertainment tourism									
Project 3: Integrated Quality Management system									
Sub-program for Capacity Building of Leisure and Entertainment Tourism									
Project 1: Continuous training for Leisure and Entertainment operations									
Sub-program for Sustainability of Leisure and Entertainment Tourism									
Project 1: Belize National Leisure Area Land Use Plans									
Project 2: Leisure and Entertainment tourism asset management and conservation									
Project 3: Leisure and Entertainment tourism inclusion mechanisms									
Sub-program for Governance of Leisure and Entertainment Tourism									
Project 1: Leisure & Entertainment Area Management									
Project 2: Regulations, norms and legislative development for Leisure and Entertainment tourism									

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Project/Year	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Program for Leisure and Entertainment Tourism Development										
Sub-program for Business & Product Development for Leisure and Entertainment Tourism										
Project 1: Belize National Leisure Area Development										
Sub-program for Infrastructure and Accessibility of Leisure and Entertainment Tourism										
Project 1: Accessibility to the destination										
Project 2: Basic services consolidation										
Sub-program for Marketing and Awareness of Leisure and Entertainment Tourism										
Project 1: Belize Leisure and Entertainment Tourism Brands										
Project 2: Leisure and Entertainment Tourism product club										
Project 3: Promotion, communication & PR										
Project 4: Product specific awareness development										
Sub-program for Standards and Safety & Security Assurance of Leisure and Entertainment Tourism										
Project 1: Operational guidelines and standards for Leisure and Entertainment tourism to prevent social conflicts										
Project 2: Safety & security for Leisure and Entertainment tourism										
Project 3: Integrated Quality Management system										
Sub-program for Capacity Building of Leisure and Entertainment Tourism										
Project 1: Continuous training for Leisure and Entertainment operations										
Sub-program for Sustainability of Leisure and Entertainment Tourism										
Project 1: Belize National Leisure Area Land Use Plans										
Project 2: Leisure and Entertainment tourism asset management and conservation										
Project 3: Leisure and Entertainment tourism inclusion mechanisms										
Sub-program for Governance of Leisure and Entertainment Tourism										
Project 1: Leisure & Entertainment Area Management										
Project 2: Regulations, norms and legislative development for Leisure and Entertainment tourism										

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1.6.9 Leisure and Entertainment Tourism Program Cost Model

Project/Year	Total (US\$)	2012	2013	2014	2015	2016	2017	2018	2019	2020
Program for Leisure and Entertainment Tourism Development	64.810.000	-	-	-	-	-	-	1.800.000	4.850.000	14.600.000
Sub-program for Business & Product Development for Leisure and Entertainment Tourism	18.700.000	-	-	-	-	-	-	400.000	3.000.000	9.000.000
Project 1: Belize National Leisure Area Developments	18.700.000							400.000	3.000.000	9.000.000
Sub-program for Infrastructure and Accessibility of Leisure and Entertainment Tourism	29.000.000	-	-	-	-	-	-	800.000	1.600.000	4.000.000
Project 1: Accessibility to the destination	23.800.000							400.000	800.000	2.000.000
Project 2: Basic services consolidation	5.200.000							400.000	800.000	2.000.000
Sub-program for Marketing and Awareness of Leisure and Entertainment Tourism	10.340.000	-	-	-	-	-	-	-	-	700.000
Project 1: Belize Leisure and Entertainment Tourism Brands	50.000									50.000
Project 2: Leisure and Entertainment Tourism product club	2.300.000									
Project 3: Promotion, communication & PR	7.000.000									500.000
Project 4: Product specific awareness development	990.000									150.000
Sub-program for Standards and Safety & Security Assurance of Leisure and Entertainment Tourism	2.370.000	-	-	-	-	-	-	-	-	300.000
Project 1: Operational guidelines and standards for Leisure and Entertainment tourism to prevent social conflicts	260.000									50.000
Project 2: Safety & security for Leisure and Entertainment tourism	1.750.000									250.000
Project 3: Integrated Quality Management system	360.000									
Sub-program for Capacity Building of Leisure and Entertainment Tourism	1.650.000	-	-	-	-	-	-	-	-	150.000
Project 1: Continuous training for Leisure and Entertainment operations	1.650.000									150.000
Sub-program for Sustainability of Leisure and Entertainment Tourism	1.950.000	-	-	-	-	-	-	400.000	200.000	400.000
Project 1: Belize National Leisure Area Land Use Plans	1.000.000							400.000	200.000	200.000
Project 2: Leisure and Entertainment tourism asset management and conservation	550.000									
Project 3: Leisure and Entertainment tourism inclusion mechanisms	400.000									200.000
Sub-program for Governance of Leisure and Entertainment Tourism	800.000	-	-	-	-	-	-	200.000	50.000	50.000
Project 1: Leisure & Entertainment Area Management	650.000							50.000	50.000	50.000
Project 2: Regulations, norms and legislative development for Leisure and Entertainment tourism	150.000							150.000		
TOTAL BUDGET L&E TOURISM MACRO PROGRAM	64.810.000,00	-	-	-	-	-	-	1.800.000	4.850.000	14.600.000

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Project/Year	Total (US\$)	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Program for Leisure and Entertainment Tourism Development	64,810,000	8,100,000	7,210,000	5,790,000	4,890,000	3,720,000	2,430,000	2,830,000	2,830,000	2,830,000	2,930,000
Sub-program for Business & Product Development for Leisure and Entertainment Tourism	18,700,000	2,000,000	1,500,000	1,100,000	1,100,000	100,000	100,000	100,000	100,000	100,000	100,000
Project 1: Belize National Leisure Area Developments	18,700,000	2,000,000	1,500,000	1,100,000	1,100,000	100,000	100,000	100,000	100,000	100,000	100,000
Sub-program for Infrastructure and Accessibility of Leisure and Entertainment Tourism	29,000,000	4,800,000	4,200,000	3,200,000	2,200,000	2,200,000	1,200,000	1,200,000	1,200,000	1,200,000	1,200,000
Project 1: Accessibility to the destination	23,800,000	4,600,000	4,000,000	3,000,000	2,000,000	2,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
Project 2: Basic services consolidation	5,200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000
Sub-program for Marketing and Awareness of Leisure and Entertainment Tourism	10,340,000	600,000	1,100,000	1,080,000	1,180,000	680,000	680,000	1,080,000	1,080,000	1,080,000	1,080,000
Project 1: Belize Leisure and Entertainment Tourism Brands	50,000										
Project 2: Leisure and Entertainment Tourism product club	2,300,000				100,000	100,000	100,000	500,000	500,000	500,000	500,000
Project 3: Promotion, communication & PR	7,000,000	500,000	1,000,000	1,000,000	1,000,000	500,000	500,000	500,000	500,000	500,000	500,000
Project 4: Product specific awareness development	990,000	100,000	100,000	80,000	80,000	80,000	80,000	80,000	80,000	80,000	80,000
Sub-program for Standards and Safety & Security Assurance of Leisure and Entertainment Tourism	2,370,000	300,000	210,000	210,000	210,000	190,000	190,000	190,000	190,000	190,000	190,000
Project 1: Operational guidelines and standards for Leisure and Entertainment tourism to prevent social conflicts	260,000	150,000	20,000	20,000	20,000						
Project 2: Safety & security for Leisure and Entertainment tourism	1,750,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000
Project 3: Integrated Quality Management system	360,000		40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000
Sub-program for Capacity Building of Leisure and Entertainment Tourism	1,650,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000
Project 1: Continuous training for Leisure and Entertainment operations	1,650,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000
Sub-program for Sustainability of Leisure and Entertainment Tourism	1,950,000	200,000	-	-	-	350,000	60,000	60,000	60,000	60,000	160,000
Project 1: Belize National Leisure Area Land Use Plans	1,000,000	200,000									
Project 2: Leisure and Entertainment tourism asset management and conservation	550,000					250,000	60,000	60,000	60,000	60,000	60,000
Project 3: Leisure and Entertainment tourism inclusion mechanisms	400,000					100,000					100,000
Sub-program for Governance of Leisure and Entertainment Tourism	800,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000
Project 1: Leisure & Entertainment Area Management	650,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000
Project 2: Regulations, norms and legislative development for Leisure and Entertainment tourism	150,000										
TOTAL BUDGET L&E TOURISM MACRO PROGRAM	64,810,000.00	8,100,000	7,210,000	5,790,000	4,890,000	3,720,000	2,430,000	2,830,000	2,830,000	2,830,000	2,930,000

Tourism Products in Competing Tourism Destinations

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Culture Tourism in Guatemala and Mexico			
Guatemala	<p>“Heart of the Mayan World” – Culture Tourism</p> 	Mexico	<p>“The place you thought you knew”</p> 
	Cultural Tourism is divided by sub-products and further by destination		The tourism products are offered as vacation theme. Cultural Tourism is structured into cultural travels, world heritage sites, archeological areas and tourism destinations. Niche segments are structured as travel experiences.
Cultural Tourism Products	<ul style="list-style-type: none"> ▶ UNESCO World Heritage: colonial heritage used as tourism assets: <ul style="list-style-type: none"> • Converted into offices, restaurants, banks and museums, e.g. Museum of antique books and national documents. • Museum of Arms offering a collection of weapons, paintings, sculptures and colonial furniture • Old commercial center of the town is used for restaurants, bars, shops, etc. • Cultural house carries out a range of cultural and social activities such as art expositions • Handicraft market selling clothing, purses, accessories, adornments, tablecloths and decoration material ▶ Community Tourism: The community tourism destinations offer visitors authentic experiences through exchange with the living culture, direct contact with nature, such as camping, the tubing, visits to caves, rivers, lakes, volcanoes, tours horseback or on bicycles, walking, hiking, fishing, canopying and bird watching, among others. 	Cultural Tourism Products	<ul style="list-style-type: none"> ▶ Routes of Mexico (A Colonial Experience, The Routes of Mexico, Wine country and Aquarium of the world, Thousands of flavors of mole, The Mystery and Origin of the Mayan Culture, The Millenary Tarahumaras, The Magic of Traditions and Nature, The Huastecas and their outstanding beauty, The fascinating encounter between History and Modern Day Mexico, The Birthplace of History and Romanticism, The Art of Tequila and Music Under the Sun) Each route presents different experiences: food, ecotourism, adventure, extreme sports, folk art, sun and sand, and more and links different places of interest. ▶ Colonial Heritage: refurbished historical architecture to be visited by destination, such as colonial churches and sophisticated buildings. ▶ World Heritage Sites: transportation in wagon train from the park entry to the ticket both, pathways indicating the track through the ruin, cords and fences preventing from touching the ruin, modern visitors' center at the car park houses, numerous souvenir shops in addition to cafeterias, refreshment stalls, toilets and telephones, parking slots for buses, vans and cars. ▶ Mexican Gastronomy: restaurants offering traditional Mexican food
Specific equipment and services offered	Community Tourism: Restaurant, ecological bar, traditional Mayan saunas, Spanish and K'iche' language school, flora and fauna, bird-watching, Tree Nursery, Artisan Crafts, Mayan Altar for ceremonies, Sanctuary, Recreation Area for children		
Marketing Opportunity	<div> Fairs <ul style="list-style-type: none"> • USA: Seattle Consumer Travel Show • Canada: Salon International Tourisme Voyage, Vancouver Golf and Travel Show • Europe: ITB – Berlin, World Travel Market (UK), BIT-Milan </div> <div> Magazines <ul style="list-style-type: none"> • USA: Travel & Leisure Magazine, Condé Nast Traveler, Great Destinations • Europe: Reisen Exclusiv, Geo Reisen, Reise - aktuell (GER) Wanderlust, Rough Guide (UK) • Central America: Conocer Mexico </div> <div> Websites <ul style="list-style-type: none"> • USA: www.thecompassculture.com, www.bravenewtraveller.com • Europe: www.abenteuer-reisen.de, www.reisen.de (GER), www.wanderlust.co.uk (UK) • Central America: www.mexicodesconocido.com.mx </div>		



Sources: INGUAT, Visit Mexico, Corazon del Bosque

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Cultural Tourism Tour Operator and Incoming Agent/DMC to Guatemala			
Tour Operator Guatemala Islands	 <p>Company philosophy: The tours shall meet the criteria for Responsible Travel - creating a positive impact on local population and/or environment, and stimulating respectful interaction and cross-cultural understanding with a twist of social learning as the key aspect.</p>	Incoming DMC for Cultural Tourism	
	<p>Mundo Guatemala is a full-service Incoming Tour Operator based in Antigua Guatemala specializing in innovative tailor-made travel & transportation for individual travelers (FIT) and small groups. Mundo Guatemala is specialized in Family Travel, Special Interest Tours, Incentive Travel, Theme Tours, High-end luxury and VIP Tours, Ecotourism-Community & Agro Tours, Nature Tours, Archaeology Tours, Soft Adventure -Jungle Hikes, Biking, Kayaking & Volcano climbing, Event Organization & Destination Management, Volunteer Opportunities & International Health Elective, Study & Travel Programs</p> <p>► Target markets: USA, Canada, Germany, UK</p>		<p>Martsam Tour & Travel and Rainforest Alliance have established an alliance to work with the operator's suppliers in Best Management Practices in Sustainable Tourism since May 2006. The brand Martsam - Luxury Travel Guatemala offers you tailor made tours designed for people that enjoy a unique adventure, big and little details that will do of your vacations a fantastic experience. Company philosophy: Sustainable Tourism Policy - all tours focus on sustainability</p>
Services offered	<p>Services offered: Themed circuits last for 8-9-10-14-15 days, most tours however last for 8 days: themes are: pure culture, pure relax, pure archeology, pure nature, pure Maya, pure adventure</p> <ul style="list-style-type: none"> ► Living Culture tours: 1-2-3 days ► Nature tours: 2,5 days ► Temple tours: 1-2-3 days ► Tours and Travels: <ul style="list-style-type: none"> • Accommodation in 3* hotels, or good standard 4* or boutique hotels, or luxury 5* hotels (depending on the budget) • daily breakfasts, lunches and dinners are included depending on the itinerary booked • all ground transfers, boat transportation and entrance fees as indicated in tour itinerary, • Experienced tour conductor/driver • local guide services (mainly in English) • VIP services: from helicopter tours and aircraft charter to gourmet dinners in elegant colonial mansion. ► Spanish classes • Homestay possibilities (full-board: serving 3 well-balanced meals per day and purified water, in Antigua or Peten) • Study & Travel experiences ► Promotion of Volunteer Programs • Volunteer program information and placement for adults, min. 2-4 weeks, special knowledge (doctors, nurses, teachers). Program includes Spanish classes, cultural training, homestay or accommodation in a Bed & Breakfast ► Coffee tours include seminar with representatives of the Coffee Cooperatives Federation and seminars on traditional vs. Organic coffee cultivation, situation of small coffee producers, Fair Trade movement, environmental issues of conventional coffee production, living & working conditions of small coffee producers, activities: coffee museum, coffee degustation, coffee processing plant and plantations, 4x4 coffee safari tours 	Services offered	<p>► Target markets: local and regional tour operators, USA</p> <p>Martsam Luxury Travel brand: Products are structured on a conventional basis or if requested for luxury consumers</p> <ul style="list-style-type: none"> ► Offering communitarian tours ► Luxury tours ► Helicopter tours, etc. <p>Martsam Value Chain:</p> <ul style="list-style-type: none"> ► Transportation: buses, mini vans, boats rented ► Local bilingual guides: own service ► Bird-watching tours of 3,5,6,8 and 15 days including visits to various nature reserves, national parks, biotopes, lakes, etc. ► Community tours ► Jungle Tours ► Tikal Special Tours: Sunset and Sunrise at the Mayan Temple ► Tours lasting one day (day excursions), ► Circuit tours: 4 different package tours (5days/6 nights, 7days/8 nights, 10 days/9 nights and 17 days/16 nights ► Including visits to macadamia factories, coffee factories

Sources: Mundo Guatemala, Mortsom Travel

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Cultural Tourism Tour Operator and Incoming Agent/DMC to Mexico			
Tour Operator Germany - Studiosus	 <p>Studiosus is the German market leader in study tours, a consequence of the high quality of his travels and the innovative product policy. Company philosophy: "perception of our social responsibility"- is one of the five main business objectives of Studiosus and includes sustainability when travelling considerably and responsively.</p>	Incoming DMC for Cultural Tourism	 <p>Amstar destination management company are dedicated to providing exceptional destination services and products to individuals, groups, corporations, tour operators and meeting planners.</p>
	<p>▶ Target Markets: German-speaking countries focusing on Germany</p> <p>Study trip product to Mexico</p> <ul style="list-style-type: none"> ▶ Scheduled flights (economy) with Lufthansa and with Aeromexico ▶ Transfers/ trips / round trip in comfortable bus (air conditioned) ▶ Accommodation in hotels mostly with air conditioning and swimming pool ▶ Double room with bath or shower and toilet ▶ Half board ▶ Specially qualified Studiosus guide ▶ Mexican tour guide (if needed) ▶ Arrival to the airport with train in 1. class ▶ Dinner in good restaurants <p>▶ Studiosus offers its trips as circuit trips</p> <p>▶ Studytours last for 14, 16 and 20 days</p> <p>▶ Spanish classes offering different levels and hours per week, accommodation possibilities: in facilities of one or max. 2 people. Or in half-board homestay, including activities included such as: visits to the cinema, guided city walk, etc.</p>		<p>▶ Target Markets: USA, Canadian Tour operators</p> <p>Products</p> <ul style="list-style-type: none"> ▶ Airport transfer and transportation ▶ Tours and day-activities/excursions: bullfighting, traditional Mexican cabaret theater, city tours, living cultures, etc. ▶ Meeting & Incentives ▶ Weddings ▶ Tour circuits: Amstar DMC offers custom-tailored programs to fit the specific needs of individual groups or travel companies. Hence, each circuit tour is tailored upon request. <p>Culture tour services:</p> <ul style="list-style-type: none"> ▶ Top-notch accommodations ▶ Deluxe air-conditioned transportation ▶ Professional, bilingual tour escorts ▶ Specialized bilingual guides based on the itinerary ▶ Entrance fees for all scheduled activities and adventures ▶ Meals and beverages detailed in each itinerary <p>Wedding services</p> <ul style="list-style-type: none"> ▶ Assistance with venue selection - including a range of off-hotel wedding locations ▶ Private airport & resort transportation including VIP services & limousines ▶ Bachelor/ette parties ▶ Rehearsal dinners - including on board a catamaran ▶ Tailor-made activities & excursions ▶ Special events

Sources: Studiosus, Amstar

Conclusions: Cultural Tourism

Based on the previous benchmark analysis gathering information on cultural tourism in Guatemala and Mexico, T&L outlines following success factors when offering cultural tourism product:

- ▶ **Cultural colonial heritage** can be restored and embellished in order to:
 - utilize them to enhance the visual aspects of the destination
 - showcase the history of the building and the past of the destinations (e.g. exhibitions on weapons, paintings, sculptures and colonial furniture)
 - host modern tourism assets, e.g. bars, restaurants, entertainment and shopping facilities
- ▶ **Community Tourism** could present **original and authentic experiences** of living culture and natural activities endorsing Belize's different cultures and providing insights to the traditions, cuisine, festivities, agriculture etc. The tourism product should provide **exchanging experiences** between the visitors and the communities including homestay accommodation, leisure activities and participation in the community or in proximity of the community which having a direct contact with the nature.
- ▶ **Official themed routes** linking **diverse** historical, living culture, agro-tourism assets and activities through the country. These tours are **self-explanatory** and only few efforts such as: distinctive signage, information pamphlets, route mapping and the listing of possible activities that can be undertaken along this road.
- ▶ **Mayan Temples** primary buffer zones provide diverse access possibilities to the sites (e.g. wagon train, natural track), a modern visitor center, car park houses, souvenir shops, cafeterias, refreshment stalls, toilets and telephones, providing an **attractive recreational area**. Well **structured parking slots** for buses, vans and cars should be offered to tour operators arriving with large or small groups as well as parking services for tourists arriving by their own means of transportation. The temple area should provide **conservation mechanisms**, such as prepared tracks, cords and fences to prevent physical contact with the ruins, sculptures and monuments, and panels providing **educational information** on the monument or area.
- ▶ **Belizean Gastronomy** could be offering **elaborate, traditional and original food** by culture living in Belize (e.g. ancient or conventional Mayan, Creole, Garifuna or Mennonite recipes, etc.) for various **quality levels** (up to haute-cuisine) applying **international hygiene standards**.
- ▶ **Cultural tourism could offer language courses** for students and professionals (e.g. **basic English or professional English** such as hospitality English)
- ▶ **Educational Agro-Culture themed routes** linking non-tourism sectors/topics of interest with tourism services e.g. Coffee tours including visits to factories, plantations, seminars and activities related to the coffee theme.
- ▶ In order to provide **luxury tours** for a very specific clientele there must be existent high end services, such as luxury accommodation, transportation (such as: helicopter tours which require specific installations and landing slots), restaurants, shopping possibilities.

Conclusions: Cultural Tourism

Services required:

- ▶ The benchmark highlighted that tourism operators programming cultural tours accommodation their costumers in **upper to high standard, boutique hotels/luxury hotels**
- ▶ They favor to sub-contract bilingual local guides, **speaking the country's and the clients' language.**
- ▶ Tour operators only contract **comfortable, modern and air conditioned means of transportation**, especially during the hot and humid period.
- ▶ For reasons of safety regulations, legal responsibility, international tour operators only use the services of **good and hygienic restaurants**, according to international sanitation standards.

Tour itinerary information:

- ▶ Guatemala offers country wide tour circuits filling up to **2 weeks**, and Mexico offers country wide tour circuits filling 2.5 weeks by touring the county and programming in average **two activities per day in a destination.**
- ▶ Guatemala offers sufficient living culture activities to fill a **3-day** itinerary by **combining traditional and every day activities with nature-related activities**
- ▶ Guatemala provides sufficient activities to fill a **3 day** itinerary on tour dedicated to cultural heritage / ancient temple by **mixing ancient heritage activities with today's way of life**, e.g. Morning visiting the temple, afternoon: visit of the old town, of a specific museum, of for shopping and leisure activities.

National Sustainable Tourism Master Plan for Belize 2030 • National Tourism Product Development Macro Program



Costa Rica			
	No artificial ingredients Tourism product and special target segments structured as activities: cultural, ecotourism, families, adventure		
Nature-based Tourism Products	Ecotourism <ul style="list-style-type: none"> ▶ 20 natural parks, infrastructure provided: paved roads, natural or provided paths, a visitor center, parking, a Red Cross station, cafeteria, arts and crafts, restroom services, lookout points, picnic areas, hiking trails, potable water, an information center, camping area, and exhibition centre. ▶ 8 biological reserves, rivers & lakes, forests, bird watching, horseback riding, canopy tours, rain forests, aerial tram ▶ Tourists can volunteer to support various conservation projects in the country and stay at the eco friendly hotels. Preservation programs like the marine turtle projects, jaguar conservation programs and save the rainforest allow tourists to take an active part in protecting the ecosystems of the region. ▶ Eco hotels and lodges offer eco tours to various areas of Costa Rica and some of these enable tourists to combine volunteer work with sightseeing. ▶ Eco-tourism activities available include hiking, horseback riding, wildlife viewing, fresh water fishing, exciting adventure tours, bird watching, trekking, kayaking and canoeing. ▶ Coffee plantation: Guest can stay on coffee farms visiting plantations and join a tour where they will learn how organic coffee is grown, harvested, dried and processed. In addition to roasting and packing their own coffee, the visitors participate in a “catación” or a coffee tasting, learning how the professionals determine quality and taste ▶ Growing organic food and coffee, restaurants offer organic food and degustation menus. ▶ Sport-fishing: Most of the hotels and lodges in the park usually arrange fishing trips and provide information on the catching and release policy 		
	Adventure <ul style="list-style-type: none"> ▶ Kayak, rafting, windsurf, treetop observation, fishing, golf, diving 		
Safeguarding mechanisms	<ul style="list-style-type: none"> • The Blue Flag Ecological Program was created in response to the imminent dangers of beach pollution, its repercussions on public health and the tourism industry. The program started in 2004 and includes the participation from the Costa Rica Tourism Institute (ICT), National Water and Sewer Service (AyA), Public Health Ministry (MS), Environment Ministry (MINAE), Education Ministry (ME) and the National Tourism Chamber (CANATUR). Each of these parties has different tasks to undertake to secure the nature and hence the tourism industry. For example, the AyA technical team is responsible for sea-water analysis, human water consumption, and coastal quality with respect to water and industrial waste. These are carried out by means of laboratory tests, while following microbiological procedures and parameters previously established. The ICT’s technical team is responsible for inorganic waste, trash cans, environmental education, security and administration, and that related to base parameters. • The Certification for Sustainable Tourism (CST) is a program that seeks to categorize and certify each tourism company (especially local accommodation facilities and tour operators) according to the degree to which its operations comply to a model of sustainability. The system is designed to include a series of direct incentives that will increase in benefits for each company, in direct proportion to its increased rating. This means that as the rating increases, more and better benefits will be received; international and national publicity and promotion, specifically designed for the CST; training for its personnel; priority participation in various world tourism fairs and events, etc. 		
Marketing Opportunities	Fairs <ul style="list-style-type: none"> • USA: Outdoor Sports and Travel Expo, Los Angeles Times Travel & Adventure Show • Canada: Salon International Tourisme Voyage (Vancouver), Travel & Vacation Show (Ottawa) • Europe: ITB – Berlin, World Travel Market (UK), BIT-Milan • Central America: FITA (MEX) 		
	Magazines <ul style="list-style-type: none"> • USA: National Geographic Traveler Magazine, Islands • Canada: Canadian World Traveller • Europe: Wanderlust Magazine (UK), Moran (GER), Bird Watching (UK) • Central America: Conocer Mexico 		
	Websites <ul style="list-style-type: none"> • USA: www.lonelyplanet.com, www.thetravelmagazine.net, www.goworldtravel.com, www.audobonmagazine.org, www.wikitravel.org, www.tripadvisor.com • Europe: www.wanderlust.co.uk, www.lonelyplanet.co.uk, www.geo.de, www.nahferreisen.de, www.footprint-adventures.co.uk, www.stefan-loose.de • Central America: www.mexicodesconocido.com.mx, 		

National Sustainable Tourism Master Plan for Belize 2030 • National Tourism Product Development Macro Program

Nature-based Tourism in Queensland, Australia			
Australia	“Where Australia Shines”		
Tourism products are structured into Experiences: Beaches, Natural & World Heritage, Lifestyle, Food & Wine, Indigenous Culture, Golf, Shopping, Spa, Farmstay & Outback, Marine Life			
Nature-based Tourism Products	<p>Nature & World Heritage:</p> <ul style="list-style-type: none">▶ World Heritage Sites: Great Barrier Reef, Fraser Islands, Wet Tropics▶ National Parks: with over 400 national parks▶ Walks: Options include world-class short, half day, full day and multi-day walks through Queensland's parks and forests to explore the nature. Infrastructure: local visitor information centers, commercial operator, overnight camping/bed and breakfast accommodation with organic food, tracks, signs▶ Special/diverse landscapes▶ Wildlife – Marine Life: structured into dive sites information, mapping. Marine life interaction: in doors or in the wild: coral spawning, dolphin feeding, whale swim programs, shark feeding, turtle nesting & hatching, whale watching▶ Diving Australian Depths: mapping of diving spots, plan your visit engine – providing accommodation, attractions, destination information, information services, tour portfolio of the destinations, transportation information and events taking place in the area.		
Safeguarding mechanisms	<ul style="list-style-type: none">▶ Reef Code of Conduct▶ Reef Water Quality Protection Plan to reduce Reduce the pollutant load from non-point sources in the water entering the Reef; and rehabilitate and conserve areas of the Reef catchment that have a role in removing water borne pollutants▶ Onboard – the tourism operator's handbook for the reef: regulations on different activities that can be undertaken on the reef, e.g. anchoring, boating, chemical use, diving, manatee protection, fish feeding, fuel & oil, litter restrictions <p>Sea Country Guardians aims to foster stewardship and a community culture of caring for the Great Barrier Reef in Indigenous communities, particularly amongst young people.</p> <ul style="list-style-type: none">▶ Reef Guardian School Program: This action-based school participation program relates to current issues affecting the Great Barrier Reef and involves students, teachers and the community in environmental initiatives.▶ Reef Guardian Council Program: The program seeks to raise awareness and encourage best management practice in local government activities, while recognizing that effective protection and management of the Great Barrier Reef requires partnerships at all levels of government, industry and the community.		
Security and awareness mechanisms	<ul style="list-style-type: none">▶ Safety Information Cards: important safety information for Scuba Diving and Snorkeling has been produced by the Queensland Government Department of Industrial Relation's Workplace Health and Safety Division. Scuba Dive and Snorkeling Safety Cards		
Marketing opportunities	<p>Fairs</p> <ul style="list-style-type: none">• USA: BTS – Beneath the Sea, Our World Under Water Show• Europe: BOOT Diving Show (GER)• Central America: FITA (MEX)	<p>Magazines</p> <ul style="list-style-type: none">• USA: Scuba Diving Magazine, SeaDuction• Canada: DIVER Magazine• Europe: Tauchen (GER)	<p>Websites</p> <ul style="list-style-type: none">• USA: www.scubadiving.com, www.underwaterjournal.com, www.divespots.com, www.travelfish.org• Canada: www.divermag.com, www.cyberdiver.com• Europe: www.divemagazine.co.uk

Sources: Queensland Australia, Great Barrier Reef Marine Park Authority

Nature-based Tourism – Incoming Tour Operators

Nature-based Tourism in Costa Rica and Australia			
Tour Operator for Nature-based / Adventure Tourism to Costa Rica	 <p>Preserving cultural heritage and conserving and replenishing the natural environment, while improving the lives of local people, is the essence of Gap Adventures' way of travelling and is integrated into every decision and action they take.</p>	Incoming DMC for Nature-based Tourism to Australia	 <p>Established in 1976, General Travel is a experienced specialist provider of Australian travel services for both group and independent travelers. It is also the country's leading travel operator for major meetings, incentive and sporting events.</p>
Services offered	<p>Gap adventures offers 5 circuit tours to Costa Rica, mainly 9 days and 14-16 days including nature-based/adventure activities such as whitewater rafting, ride waterfalls, rappelling, surf course, wild life spotting, boat cruise, volcano viewing, sailing, trail hiking in reserves and national parks.</p> <p>▶ Target Markets : young, American, Canadian, UK, Australian</p> <p>Services offered on a comfort tour:</p> <ul style="list-style-type: none"> ▶ Maximum group size of 15 ▶ Experienced group leader ▶ Local guides ▶ Meals included – half pension ▶ Transportation – private van, boat ▶ Accommodation: modest comfortable hotels and lodge. Gap Adventure uses a variety of hotels. A complete list of hotels won't be provided until the tour start. Travelers travelling alone can sometimes book a single room, but will in most cases share a room of a co-traveler of the same sex. <p>Services offered on a standard tour:</p> <ul style="list-style-type: none"> ▶ Maximum group size of 15 ▶ Experienced group leader ▶ Local guides ▶ No meals included ▶ Transportation – private van, boat ▶ Accommodation: modest hotel 	Services offered	<p>▶ Target Markets: North America, Europe</p> <p>Services offered</p> <ul style="list-style-type: none"> ▶ Airport "Meet and Greet" services ▶ Limousine and coach transfers ▶ Multi-lingual tour guides ▶ All styles of accommodation booking services ▶ Restaurant bookings ▶ Entertainment ▶ Adventure tours ▶ Special interest and technical tours ▶ Series tours ▶ Scheduled and tailor made tours ▶ Cruising ▶ 24 hour / 7 day toll free helpline – 1300 306 077 <p>Accommodation quality and tour itineraries upon request</p>

Sources: GAP Adventures, General Travel Australia

Conclusions: Nature-based Tourism

Based on the previous benchmark analysis gathering information on Nature-based tourism in Costa Rica and Queensland, T&L outlined following success factors offered:

Ecotourism:

- ▶ In order to be **entertaining, educational and safe tourism assets** generating income, Nature Parks can providing tourism infrastructure which will increase to **tourist's experience** such as: paved and/or natural paths through the park, a visitor centre, parking slots, a Red Cross station, cafeterias, food stalls, arts & crafts centres, restrooms, lookout points, picnic areas, hiking trails and signage, potable water stations, information centers in the park, camping area and exhibition centre. Some of these amenities highlight the courtesy of the National Park and enhance the tourist's experience and perception, which is especially crucial in terms of safety and security.
- ▶ Nature reserves are structured **as entertainment areas with direct contact with nature**. Activities offered can be both **active or passive**, can be **adventurous or recreational**, however it is important that each activity has its own area in order not to affect the experience provided by the other activities such as horseback riding, canopy tours, aerial trams, birdwarching, sport-fishing, trekking, kayaking, canoeing, etc.
- ▶ Ecotourism requires its **own accommodation style**, such as Eco-hotels/lodges which shares the principle and philosophies of Eco-travelers and its **own eco-tourism activities** such as volunteer work for nature-based/conservation or cultural projects, such as marine turtle projects, jaguar conservation, rainforest programs
- ▶ Ecotourism can offer **national nature-walks** (which could be a specific nature-based themed route) combining various nature parks and forests with signage all though the track, local visitor information centers, overnight facilities (camping, B&B serving organic food). These nature walks would have different motivations as background , such as **educational, recreational and/or entertainment** while focusing on constant contact with nature. Compared to guided tours, these walks enable tourists to travel through the country **independently** and on their own means, by still being **guided** through the assets of the destinations.
- ▶ Ecotourism could offer possibilities to showcase local flora and fauna in its **natural habitat** (tours to watch manatees, feed sharks, etc.) but also provide the possibility to be visited through **a man made facility** such as zoo, aquarium without leaving the human's comfort zone.

Conclusions: Nature-based Tourism


Tourism Services:

- ▶ International tour operators and programmers require experienced and well-trained nature-based tourism guides. Skills that are crucial is a broad knowledge on the local flora and fauna, safety standards, tour guiding skills, etc.
- ▶ Nature-based tourism service providers can be modest but must be at least comfortable and apply **international hygiene standards** and should be able to cater **small groups** of up to 20 people. Hence, importance is not given on the luxury level, but on the **comfort, intimate and relaxed atmosphere**.

Safeguarding Mechanisms for Nature-based tourism:



- ▶ Prevention of beach degradation programs to conserve the nature and the sustainability of its tourism usage
- ▶ Sustainable Tourism Certification of the local tourism industry providing incentives to the certificated companies in order to **enhance the level of sustainability** throughout the tourism sector
- ▶ Reef Code of Conduct in order to raise the awareness and information on how to **interact responsively** with the specific underwater flora and fauna
- ▶ Reef Water Quality Protection Plan to **prevent pollution of ecosystems** for an enhanced sustainable usage of the sea and the reef as tourism assets
- ▶ Programs to foster stewardship and community culture of caring for the reef (reference to Queensland's Sea Country Guardians) to raise **awareness amongst communities** and strengthen civil pride
- ▶ Safety Information Cards for scuba divers and snorkelers to raise the **awareness** of sustainable usage of the reef and safety guidelines for the visitor to enhance the tourist's experience while safeguarding the tourism asset.

National Sustainable Tourism Master Plan for Belize 2030 • National Tourism Product Development Macro Program

Sun & Beach Tourism at Riviera Maya, Mexico				
Riviera Maya	The Riviera Maya, as a tourist destination, was created in 1999. Since then, the Riviera Maya became, along with Cancun, the most important tourist destination in Mexico and one of the most popular internationally.			
	Sun & beach Tourism is Riviera Maya's main tourism product, complemented with nautical, cultural activities for adult couples , families, jungle expeditions and for niche segements: Golf and Weddings/Honeymoons			
Sun & Beach Tourism Products	Services offered <ul style="list-style-type: none">▶ Mostly all-inclusive hotels: Hotel offers extensive range of restaurants and food options, international animation/sports and entertainment team offering attractions such as cooking and cocktail demonstrations, day activities, such as pool aerobics, bicycle tours, snorkeling, beach and pool volleyball, darts, tennis, beach soccer, shuttle bus to the main entertainment area, evening shows, piano and cigar bar, movies & sporting events on big screen on the beach, bonfire parties, live music▶ Different room standards: luxury, junior, ocean view, ocean front, honeymoon suite, etc. With or without terrace offering different room amenities such as air conditioning, CD player, mini bar▶ Spa resorts with different types of massages and wellbeing therapies▶ Entertainment services providing an diverse restaurants, bars and clubs▶ Beaches with clean white sand; Sand bags are placed out in sea to break the waves, shallow beaches for children needs,▶ Aquatic activities: snorkeling, diving, game fishing▶ Sports: tennis, golf▶ Transportation: Free bus service to Playa del Carmen / Entertainment and Dining Area			
	Additional infrastructure <ul style="list-style-type: none">▶ Pedestrian walkway for shopping and leisure area▶ Marina with shops and restaurants			
Safeguarding mechanisms	<ul style="list-style-type: none">• A Tourist Police force in the tourism destinations is designed to help with exactly crimes such as pickpockets, thieves and con men. The Tourist Police assists visitors in these cases.• Beach maintenance as Cancun beaches degraded: Costs USD 71 million for 2000 tons of pipeline material, more than 1.3 billion gallons of sand to fill all of Cancun's Hotel Zone Seashore.			
Marketing Opportunities	Fairs <ul style="list-style-type: none">• USA: Seattle Consumer Travel Show• Canada: Salon International Tourisme Voyage, Vancouver• Europe: ITB – Berlin, World Travel Market (UK), BIT-Milan• Central America: FITA (MEX)		Magazines <ul style="list-style-type: none">• USA: Caribbean Travel + Life, Destination Weddings & Honeymoons, Caribbean Travel and Life• Europe: Reisen – aktuell (UK), National Geographic Travel	Websites <ul style="list-style-type: none">• USA: www.familiesonlinemagazine.com, www.getawaytoday.com• Canada: www.travelandleisure.com• Europe: www.guardian.co.uk

Sources: Riviera Maya Tourism Office, Playazome Wordpress

Sun & Beach – Incoming Tour Operators

Sun & Beach Tourism in Riviera Maya			
Tour Operator for Sun & Beach Tourism to Riviera Maya and Cancun	 America's Favorite Vacation Company Masstourism Tour Operator	Incoming DMC for Sun & Beach Tourism to Riviera Maya and Cancun	 The ROYALE Group of companies is one of the leading Mexican DMC/incoming operators and wholesalers focused specially on the European, US, Canadian and Latin American markets. The business units in Cancun and Mexico City have been officially certified to render services for groups from China.
	Number 1 tour operator to Mexico and the Dominican Republic, Apple Vacation sees itself as tourism destination maker, as it enhanced strongly tourism arrivals to Cancun and opened up Punta Cana to become "one of the hottest vacation spots in the Caribbean" for US costumers. In only 2 years Apple vacations claims to have succeed in bringing one million to Punta Cana.		ROYALE holiday travel agency offers a wide range of services to the general public such as tour packages, airline tickets, cruises and custom tours. ROYALE Cancun Tours organizes, coordinates and provides services in the destination for individual travelers from transfers and excursions to representatives at the hotels and the airport. ROYALE DMC, Cancun is specialized in destination management services and offers a wide range of services and logistical support for all types of events, from conferences, conventions, trade shows and incentives to particular groups. The head office is specialized in general incoming nationwide, particularly focused on consultancy and general logistic support for tour operators, tour planning, coordination and operation of group tours such as cultural circuits, special interest tours, incentive-trips, conventions, pre and post congress tours as well as off-shore programs and airline tickets.
Services offered	<p>▶ Target Markets: USA</p> <p>Services can be purchased individually or jointly (dynamic package booking system)</p> <ul style="list-style-type: none"> ▶ Flights ▶ Hotels: inclusive hotels or bed and breakfast can be chosen, hotels without children, family hotels high end - luxury ▶ Excursions and on land services provided by Amstar Incoming Agent in Cancun or other destination management companies providing services to Apple Vacations customer. ▶ Each tour can be booked individually at the same time of the package purchase or at the destination. ▶ Vacation Security (AVOK) 	Services offered	<p>▶ Target Markets: USA, Canada, UK, Australia, Mexico, Colombia, Argentina, Spain</p> <p>ROYALE Tours (tour operator) and ROYALE DMC (incoming agent) offer destination services including:</p> <ul style="list-style-type: none"> • ground transfers, • sightseeing excursions (day tours, night tours) • hotel reservations, • car rentals, • educational circuits and • special events. <p>Their services are available in English, French, Italian, Portuguese and German, partly also in Dutch, Russian and Japanese among others. At the beach destinations of Cancun, Playa del Carmen/Riviera Maya, Acapulco, Puerto Vallarta and Los Cabos but also in Merida we provide overall DMC-services such as:</p> <ul style="list-style-type: none"> • transfers, • excursions (private and shared services), • guest services (assistance & hospitality desks), • special events including decoration, musicians and audiovisual equipments, etc. <p>The ROYALE Group's Transportation Companies own coaches, vans type Ford Club Wagon, small coaches type MB Sprinter, deluxe full size and executive mid size cars. All owned luxury air-conditioned vehicles are in contact with local dispatch offices by radio to guarantee the success of each operation.</p>

Conclusions: Sun & Beach

Based on the previous benchmark analysis gathering information on Sun & Beach tourism at Riviera Maya in Mexico, T&L outlined following success factors offered:

Sun & Beach Tourism:

- ▶ Riviera Maya as mass-tourism destination focusing on the USA market provides **high-end, luxury accommodation** facilities with **all-inclusive services** such as meals, beverages, sport and recreational facilities.
- ▶ The accommodation offer varies on the tourist segment targeted, hence accommodation facilities such as **family hotels** catering specific needs of children and parents and **hotels without children** etc.
- ▶ Even the beach require **safety standards** adapted to the segments needs, such as shallow beaches and wave breakers for the Families with young children
- ▶ The sun and beach tourism product is **complimented with other activities**, such as nautical or cultural which should be within reach of the sun & beach destination to be offered as day-excursion..
- ▶ The destination offers one **specific well planned, safe entertainment area** offering diverse food and beverage, nightlife, shopping facilities which unites the tourism offer and the tourists and offers an enhanced tourism experience generating further tourists' expenditures.



Tourism Services:

- ▶ Transportation services must be **modern, comfortable, air-conditions** (especially in the hot season)
- ▶ Sun & Beach resorts provide various possibilities to integrate local communities, e.g. for the entertainment sector **require skilled local artists**, such as musicians, acrobats, singers.
- ▶ Guiding services should offer **multi-lingual and specialized tour guides** including various European languages

Safeguarding Mechanisms for Sun & Beach:

- ▶ In large tourism hubs, a own tourist police force should be applied to secure an enhanced tourist experience and maintain a positive destination image free of harassments, petty thieves and crimes
- ▶ Beach maintenance programs are important in order to prevent the main assets degradation and cost-intensive restoration.

Nautical Tourism - Benchmark

Nautical /Fishing Tourism in Florida			
Florida	 	Structure: By Product including Product Managers per product called "The Insider". Web 2.0 applications to interact directly with the product manager appearing on blog entries.	
Nautical Tourism Products	<p>Nautical Tourism Value Chain – Opportunities:</p> <ul style="list-style-type: none"> ▶ Marinas, services offered: <ul style="list-style-type: none"> • Slips, Overnight docking, Boat rental, Bait & Tackle, Parts & maintenance services, Fuel docks, Canoes/kayak rental, Showers, Fishing guides & charters, picnic areas, dry storage, boat ramps, transient dockage. Services offering tennis, golf, fishing and diving, waterfront restaurants and bars ▶ Fishing Camps/Fishing Resorts offering: <ul style="list-style-type: none"> • boat rental/repairs/sales/storage, professional fishing guide, fishing license, accommodation (luxury to camping) • Fishing guides & charters ▶ Yacht Marina services: <ul style="list-style-type: none"> • Boatyard for yachts to 90 feet, marine electronics retailers ▶ Marina Yacht Club services offered: <ul style="list-style-type: none"> • For yachts for up to 180ft, private & safeguarded 24h security, waterfront lodging, waterfront dining & bars <p>Additional products</p> <ul style="list-style-type: none"> ▶ Boating products: boat tours, docking areas, air boat tours to sensitive lagoons, ▶ Fishing: Fishing charters, fishing tours, lessons on regulations ▶ Sport events: international regattas and sailing tournaments, fishing tournaments, Fishing and Angling flea markets ▶ Sailing and boat shows ▶ Sailing schools 	Promotion Florida – Fishing and Boating	<ul style="list-style-type: none"> ▶ Boating, Fishing and outdoor enthusiasts are a strategic niche segment of Florida's tourism marketing strategy 2010-2011, Total Marketing Budget 2011: USD 62.5 million ▶ It is promoted over the website www.sharealittlesunshine.org addressing Florida residents to attract friends and relatives to the Sunshine State. Promotion over: website, facebook, interactive online ads, direct marketing through partner efforts and online advertising of public service announcement. ▶ Own brochure and web-blog hosted by "the Insider" on Fishing and Boating in Florida engaging web site users with inspirations, timely content in the form of blogs, videos, articles and responding to questions using the tool web 2.0 technology generating traffic with social media on facebook, twitter and external blog sites. ▶ Visit Florida does not target boating and fishing publications, but uses its campaigns (including boating and fishing activities) as placement in print and online media. ▶ Co-operation program for Florida tourism industry Partners to advertise in Florida Fishing & Boating Magazine ▶ VISIT FLORIDA is working with the Florida Fish & Wildlife Conservation Commission (FWC) to enhance the web site www.fishingcapital.com which will be the call to action for all fishing and boating related advertising.
Safeguarding mechanisms	<ul style="list-style-type: none"> ▶ Boating regulations incorporated into Florida Statutes, such as: <ul style="list-style-type: none"> • Vessel speed restrictions • Water ski regulations • Law enforcement authority, such as Florida Fish and Wildlife Conservation Commission officers, sheriff's deputies and other authorized enforcement officers can enforce the state, boating and safety laws. • Manatee awareness: punishment, fines (up to a USD 50,000) and one-year imprisonment can be enforced when disrupting or harassing manatees • Sea grass awareness: diffusion of the importance of sea grass for marine herbivores and best practice recommendations on how to avoid damaging the soils. Punishments when damaging the sea grass beds. 	<ul style="list-style-type: none"> ▶ Fishing regulations incorporated into Florida Statutes and strengthened by the Florida Wildlife Code: <ul style="list-style-type: none"> • Saltwater regulations • Freshwater commercial fishing rules • Laws & punishments according to Florida Statutes • Code of Angler Ethics • Recreational Fishing Licenses • Regulations on species, minimum size limits, closed season, maximum weight/amount, prohibited species • Regulations of fishing methods and areas: hook-and-line gear, nets, spearing 	
Promotion Opportunities per market	<p>Fairs</p> <ul style="list-style-type: none"> • USA: Sportfishing • Canada: Outdoor Adventure Show (Toronto) 	<p>Magazines</p> <ul style="list-style-type: none"> • USA: American Angler, Bass Master, Florida Sport Fishing, Saltwater Sportsman, Sport Fishing • Canada: Outdoor Canada • Europe: Angling Times, Sea Angler (UK) 	<p>Websites</p> <ul style="list-style-type: none"> • USA: US-sport fishing News, www.sportfishingmag.com, www.floridasportfishing.com • Canada: www.outdoorcanada.ca, www.thenewflyfisher.com • Europe: www.fishandfly.com, www.gofishing.co.uk, (UK)

Sources: Visit Florida, FWC, Sunshine News

Nautical Tourism - Benchmark

Nautical Tourism in the Virgin Islands			
The New Antilles	 <p>"Nature's little secrets"</p>	 <p>"No passport required"</p>	Product structure by destination and further by activity
Nautical Tourism Products	<div><div><p>Nautical Tourism Value Chain – Opportunities:</p><ul style="list-style-type: none">▶ Marina services/facilities (B-VI):<ul style="list-style-type: none">• Booking over: Email, telephone and fax bookings, Telephone booths, Water, electricity (110V, 220V and 380V), fuel dock, Toilets and showers, Telephone, Internet, mobile phone hire, laundry, 24hr security, Vacuum points (waste water), Postal service, Emergency technical assistance (water pollution, fire, etc.), Car hire, washing machine, restaurants and bars, facility for repairs</div><div><p>US Virgin Island</p><ul style="list-style-type: none">▶ Food supply: provisioning specialized for boat trips▶ St. Thomas Yacht Club: offering restaurant, bar, sailing and tennis. Organizing regatta and tennis cups, summer sailing camps,▶ Sailing school offer summer sailing camps, sailing for children, sailing for adults, sailing for high school students (partnering with American high schools)</div><div><p>Additional products</p><ul style="list-style-type: none">▶ Sport Events: Fishing tournaments▶ International sailing regatta▶ Crewed charter rental: boat rental, cook, skipper, captain, etc.▶ Sailing school▶ Power boating: motor boat rentals</div></div>		
Safeguarding mechanisms	<p>British Virgin Islands:</p> <ul style="list-style-type: none">▶ Virgin Islands Search and Rescue (VISAR) is a voluntary organization dedicated to saving life at sea in the waters around the British Virgin Islands. VISAR is an independent, volunteer-based organization funded almost entirely by charitable donations.▶ Fishing permit: as The removal of any marine organism from British Virgin Islands waters without a recreational fishing permit is illegal for non-BVIslanders.▶ Moorings and Marine Conservation Permits. The use of National Parks Trust moorings without a permit is illegal		
Promotions Opportunities	<p>Fairs</p> <ul style="list-style-type: none">▶ USA: Boat Sport & Travel Show▶ Europe: International Boat Show (Düsseldorf), Boat and Caravan Show (UK)	<p>Magazines</p> <ul style="list-style-type: none">▶ USA: Cruise Travel, Porthole, Caribbean Travel and Life, Blue Water Sailing, Sail Magazine▶ Canada: Canadian Yachting Magazine▶ Europe: Yacht & Yachting (UK), Segeln (DE)	<p>Websites</p> <ul style="list-style-type: none">▶ USA: www.bwsailing.com▶ Europe: www.segeln-magazin.de (GER), www.ybw.com (UK)

Sources: US Virgin Islands, British Virgin Islands

Nautical Tourism – Incoming Tour Operators

Nautical Tourism Operator and Incoming Agent/DMC			
Operator British and US Virgin Islands	 <p>Blue Horizon Travel & Yacht Charters 12570 US Hwy 150, Orion, IL 61273 (309)526-3499 or (800)939-4334 FAX: (309)526-8333</p>	Incoming DMC for British and US Virgin Islands	
	Blue Horizon Yacht Charters specializes in private crewed yacht charters in the U.S. and British Virgin Islands.		Tropic Tours, a division of Caribbean Travel Agency Inc, was established in 1962 and is the biggest, most experienced DMC for both the U.S. and the British Virgin Islands.
Services offered	<p>▶ Targeted Markets: USA</p> <p>Services provided:</p> <ul style="list-style-type: none"> ▶ Elegant yachts — power and sail ▶ Deluxe accommodations for 2 to 12 guests — Tandem charters available for larger groups ▶ Gourmet meals — customized itineraries — experienced crews ▶ All-inclusive price includes meals, beverages and most activities ▶ Snorkeling, windsurfing, water skiing, kayaking, fishing, hiking ▶ Scuba diving packages and instruction available — additional charge ▶ Perfect for Honeymoons, Anniversaries, Families, Couples, Special Groups 	Services offered	<p>▶ Targeted Markets: USA</p> <p>Tropic Tours offers a transportation fleet, has a seven-day a week, fully manned counter at the airport to assist travelers and offers customized packages as a part of its full destination management services.</p> <p>Tropic Tours offers excursions on and to the US. Virgin islands and group travels such as:</p> <ul style="list-style-type: none"> ▶ Corporate Incentive Programs ▶ Event Planning ▶ Wedding groups ▶ Dinner Functions and Galas ▶ Group Dining Excursions ▶ Team Building Activities ▶ Airport transfers ▶ Sightseeing tours

Sources: Blue Horizon Travel & Yacht Charters, Tropic Tours

Conclusions: Nautical Tourism

Based on the previous benchmark analysis gathering information on Nautical tourism at the Virgin Islands in the Caribbean Sea, T&L outlined following success factors offered:

- ▶ The integrated system of marinas should provide marinas providing **infrastructure and services for both overnight docking and short onshore stays**. Marinas should provide infrastructure that enable **customers to feel accommodated, entertaining, safe and offer boating related services**.
 - Overnight docking marina require **basic facilities** such as: restrooms, showers, dry storage, boat ramps, transient dockage, picnic areas, fuel docks, vacuum points (for waste water discharging), laundry service
 - **Additional marina facilities** could be sailing schools, restaurant, bars, entertainment facilities, shopping, water-front lodging, sailing schools
 - Marinas could provide further **services** such as: boat rental, repairs, sales and charters, professional fishing guides, fishing license, canoes/kayak rentals, food supply/provisioning, car rentals.

- ▶ **Sport fishing does not require specific infrastructure**, however is requires **fishing regulations** which should become laws and should be incorporated into the national statutes and strengthened by the local authorities and wildlife NGOs. Such regulations should include regulation on fishing methods, species and fishing periods, and encourage a respectful interaction with nature and the animals.

- ▶ Yacht operators in the Caribbean specialize on **luxury** products providing:
 - elegant yachts providing deluxe accommodation for up to 12 guests
 - Gourmet meals
 - Customized itineraries
 - Experienced crews speaking the language of the client (mostly English as the Virgin Islands mostly target USA and UK citizens)
 - Offer additional fun sports and adventure activities

National Sustainable Tourism Master Plan for Belize 2030 • National Tourism Product Development Macro Program

Leisure & Entertainment Tourism in Singapore and Barcelona (La Roca)			
Singapore	  	Barcelona	 
	<p>The Leisure & Entertainment area (5sq km) is divided by themed slots and further by activities that can be undertaken and services that can be consumed. Singapore's tourism offer is structured by product and further by activity and interest (which is due to the fact that Singapore is very small and easy to get around).</p> <p>Main spending markets for shopping: Indonesia, P R China, Australia and Malaysia</p> <p>With 36% of all spending, Shopping was the highest expenditure item in 2009.</p> <p>Main markets for entertainment at Sentosa: India, Philippines, South Korea</p>		<p>Within Barcelona's tourism portfolio, shopping tourism is structured as tourism activity which is further listed by interest and city area. All through the year, Turisme de Barcelona undertakes various campaigns, e.g. Christmas Shopping in Barcelona.</p> <p>Barcelona Shopping Line is the tourism product's team which promotes the city on an international level, have started a signage, information, advertising and promotion action plan as well as targeting new shopping-members, such as big shopping malls and outlet centers.</p> <p>Shopping tourism targets: local, regional, English, French, German and Dutch speaking markets and Italians and Russians.</p>
Leisure & Entertainment Tourism Area	<p>Leisure & Entertainment Tourism Value Chain – Opportunities:</p> <ul style="list-style-type: none"> ▶ Transportation, services offered: <ul style="list-style-type: none"> • Attractive Boardwalk for pedestrian, metro, express train, cable car, public buses, hop-on trolley (tourism bus service), Sentosa bus - from the city centre ▶ Accommodation: 5 themed hotels called "Integrated resorts" providing a mixed services such as casinos, themed attractions, entertainment and performance venues, hotel, retail, and MICE facilities and 1 spa-villa resort ▶ Entertainment: gambling casinos with 1,000 gambling tables and 1,400 slot machines, shopping malls hosting luxury brands ▶ Shopping malls hosting luxury brands ▶ Food and Beverage: restaurants, bars, night clubs ▶ Information: Sentosa Visitor Center, Information panels 	Shopping Tourism Products	<ul style="list-style-type: none"> ▶ Shopping Tourism Value Chain – Opportunities: ▶ Transportation services offered: <ul style="list-style-type: none"> • Buses from the city centre to the shopping area ▶ Luxury shopping: the village (built like a typical local-style village) offers over 100 leading brands featuring discounts of up to 60% throughout the year. ▶ F&B: restaurants with outdoor dining areas ▶ Information: tourist office, website provides a virtual map of the area where the consumer can browse by favorite shops and interest and therefore better plan their itinerary. ▶ Services: tax-free shopping – refund of taxes when leaving the country
Additional products/ services	<ul style="list-style-type: none"> ▶ Sports: Golf Club ▶ Meeting and conference rooms ▶ Attractions: <ul style="list-style-type: none"> • Universal Studios theme park, • Marine life park (Research, public education and conservation efforts for marine life are the cornerstones of the Marine Life Park) • Maritime Museum (showcasing the tale of maritime adventurers, sea pirates, and the growth of sea trade between Asia, the Middle East and Europe is told. • Shows, events, concerts, circus spectacles, etc. • Kids Club • Zip Adventure Park • Cinemas • Nature Discovery Centre, Butterfly & Insect Kingdom 	Additional products/ services	<p>Services offered by Barcelona Tourism:</p> <ul style="list-style-type: none"> ▶ Barcelona offers: different routes tailored to every need and budget: for children, for women or men. ▶ La Roca Outlet offers luxury brand products for women, men, children, home & lifestyle, shoes & accessories, lingerie and beauty ▶ Additional services of La Roca Village: Children's play area ▶ Linking proximate tourism destinations, activities and events as complementary product to shopping tourism <p>Luxury shopping services offered by incoming agents:</p> <ul style="list-style-type: none"> ▶ Personal stylist, Personal shopper ▶ Color Training, Make-up and Hair ▶ Consultations of clothes/styles ▶ Consultations for bridal wear and accessories
Safeguarding mechanisms	<ul style="list-style-type: none"> ▶ Marine life park funds marine conservation and research projects ▶ To mitigate the social concerns of the casinos, Singapore put in place a national framework to address problem gambling, comprising of the National Council on Problem Gambling (NCPG: an independent council comprising 20 members with expertise in public communications, psychiatry and psychology, social services, counseling, legal, rehabilitative as well as religious services), regulation, public education, etc. and work amongst others on the development of help and awareness programs and their campaigns. 	Promotion Opportunities	<p>Websites</p> <ul style="list-style-type: none"> • Central America, especially addressing Mexicans • Cruise visitors: through the cruise website of Belize targeting cruise visitors to the Corozal Leisure & Entertainment area

Sources: Sentosa, Singapore Tourism Board, www.knowtheline.sg, La Roca Village, Tourism Barcelona

Conclusions: Leisure & Entertainment Tourism

Based on the previous benchmark analysis gathering information on Leisure & Entertainment tourism in Singapore and Barcelona, T&L outlined following success factors offered:

- ▶ Singapore and Barcelona structured their entertainment and shopping product by providing **themes** (accommodation, architecture of shopping area, activities) that **attract on the one hand side families and on the other side a luxury segment**.
- ▶ Hotels are suggested to represent **more than just accommodation**, but are a facility providing entertainment though: casinos, themed attractions, performance and MICE venues, retail shopping possibilities and sport facilities.
- ▶ Especially luxury shopping facilities should include dining and children play areas, and fashion-stylists services
- ▶ **Areas that combine leisure, entertainment, gambling and accommodation facilities can be planed and structured like a destination on its own, providing services for specific segments to fill their itineraries for various days.**
- ▶ Shopping and Entertainment Tourism promoted as individual tourism product can only attract proximate markets, whereas the combination with other tourism products can attract long-hall targets

Safeguarding mechanisms for gambling

- ▶ **National framework** (including regulation, public education, help and awareness programs and different campaigns) to address problem related to a nd resulting from gambling.

National Sustainable Tourism Master Plan for Belize 2030 • National Tourism Product Development Macro Program

Cruise Tourism in General and in Barcelona, Spain			
Cruise Tourism Value Chain - Opportunities	<ul style="list-style-type: none"> Shopping Agents which promote selected shops, products and services and are fully authorized to do so by the cruise line, which receives a commission. Services that can be provided by the National Tourism Association, that are considered most effective are: publication of information of interest to cruise passengers, support for joint promotional efforts (trade fairs, mailings, etc.) coordination with various local agents, joint publicity campaigns and other promotional activities (road shows, NTO websites, etc.) <p>Printed “Shopping Guide” mapping the selected shops in the area selected on the basis of quality, fair prices and value.</p> <p>Shop-keepers give cruise lines a guarantee valid for 30 days after purchase, except in cases of negligence or buyer’s remorse.</p>	Barcelona	  <p>Set up in Rome on the 11th of June 1996, MedCruise is the Association of Mediterranean Cruise Ports. MedCruise’s mission is to promote the cruise industry in the Mediterranean and its adjoining seas as tourist destinations. Furthermore, Turisme de Barcelona promotes tourism to the city on an international basis. Today, Port of Barcelona has seven cruise terminals receiving more than 2 million cruise passengers per year.</p>
	<p>Fairs and Trade Shows</p> <ul style="list-style-type: none"> USA: Seatrade Show – Miami, Seatrade Cruise Shipping Convention, Annual Conference & Trade Show (by Marine Hotel Association in Florida) Canada: Cruise-3-Sixty, Vancouver Europe: Cruise & Ferry Conference (UK) <p>Magazines</p> <ul style="list-style-type: none"> USA: Cruise Traveler Magazine, Porthole <p>Trend: Increased promotion addressing Travel Agents</p> <ul style="list-style-type: none"> USA: Travel Summit Conference, Passport to profits Idea A-Thon, Leisure Travel/ Winter Cruise A-Thon, Cruise A-Thon 		<p>Cruise Tourism Value Chain – Opportunities:</p> <ul style="list-style-type: none"> Terminal facilities: <ul style="list-style-type: none"> The local Port Authority grants cruise lines a concession on the terminals for 25 years. These cruise lines operate and invest in the terminals, which are administered by a direct terminal management policy developed by the cruise lines Transportation: <ul style="list-style-type: none"> Bus services from the cruise terminal to the city entry Services for visitors travelling on their own: <ul style="list-style-type: none"> Tourist information offices, tour buses, guided tours, bicycle and scooter tours, Barcelona Card, etc.
	<ul style="list-style-type: none"> Implement a local agenda (ref. Mexico) for local cruise destination for the purpose of promoting local and regional development from an environmental, economic and social perspective, establishing a framework for sustainable tourism development Implementation of regional and urban environmental and tourism plans and programs, provisions governing land use, laws, regulations and official Belizean environmental regulations, as well as programs for the management of natural protected areas. Design and execute plans for phytozoo-sanitary risks and environmental contingencies in each port Encourage cruise lines to distribute important environmental information on the destination to passengers and crew members Establish a Memorandum of Understanding citing the environmental regulations for protection of Belize’s coasts and sea and the commitment of the cruise industry to be aware and respective. Evaluation and promotion of: safe berthing and cast-off maneuvers, safety and sign posting for the port terminal, terminal infrastructure, piers and movement within the port tourist satisfaction, economic effects 	<p>Handling relations with cruise lines</p> <p>Safeguarding mechanisms</p> <p>Keys to success:</p>	<p>Turisme de Barcelona actions for cruise tourism:</p> <ul style="list-style-type: none"> Arranging pier receptions for cruise passengers by the urban police officers to secure the safety of cruise passengers Presentation of medallions for arriving cruise ships Strong promotion of cruise tourism, after positioning on the European markets, now focusing its marketing actions on promotional activities on travel agencies in the USA. <ul style="list-style-type: none"> Legal security for real estate investment in the port area In order for hotels not to suffer from the growth in cruise passenger arrivals, Barcelona positioned itself as a base port for cruise lines and therefore created an opportunity for the city’s hoteliers. <ul style="list-style-type: none"> Intelligent promotion of the destination using the city’s image and strategic relations with cruise lines since 1992 (Barcelona’s Olympic Games) Becoming a port of call providing different means of international arrivals in proximity to the city center and the cruise terminal, increase the overnights and spending in Barcelona Product development for specific customer segments Coordination among authorities, based on effectiveness and avoiding excessive bureaucracy Gradual investment based on current port facility needs Citizen’s security Efforts to heighten awareness within the Port Authority and Turisme de Barcelona about Cruise Tourism.

Sources: Tourism Barcelona, UNWTO (publication Cruise Tourism, 2010), www.medcruise.com

Conclusions: Cruise Tourism

Based on the previous benchmark analysis gathering information on Cruise tourism in Barcelona, T&L outlined following success factors offered:

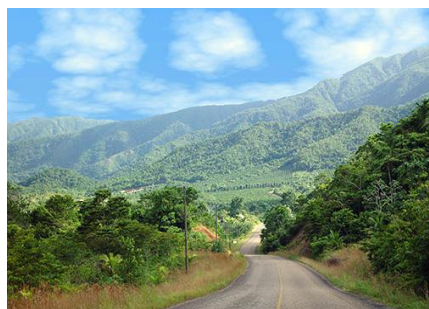
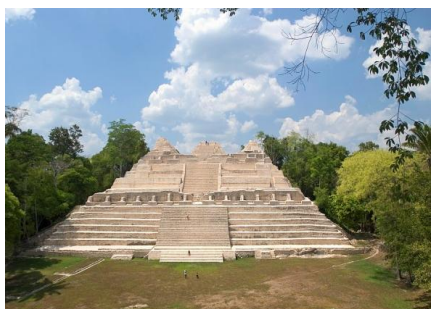
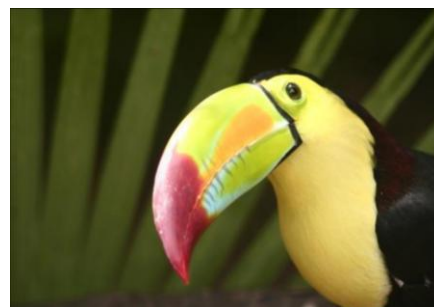
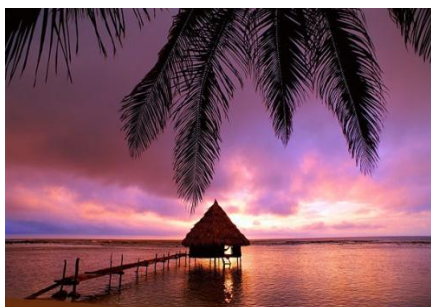
- ▶ Cruise passengers require **safety** and different **channels of information**, especially at the destination itself in order to inform individual tourists/cruisers (tourist information desk providing information on assets that can be visited or activities that can be undertaken) on the destination's offerings.
- ▶ Infrastructure: It is important to provide different **means of transportation** at the destination to various visit various assets
- ▶ The cruise visitors **require activities and tourism products** (e.g. Shopping Guide, Barcelona Card, Special interest itineraries etc.) that facilitate the tourists/cruisers to organize their time at the destination.
- ▶ To structure the port into a **base port for cruise liners** created an opportunity for the destination's hoteliers.

Safe guarding mechanisms:

- ▶ Implement a **local agenda** (ref. Mexico) for local cruise destination for the purpose of **promoting local and regional development** from an environmental, economic and social perspective, establishing a **framework for sustainable tourism development**
- ▶ Implementation of **regional and urban environmental and tourism plans and programs**, provisions governing land use, laws, regulations and official Belizean environmental regulations, as well as programs for the management of natural protected areas.
- ▶ Design and execute plans for phytozoo-sanitary risks and environmental contingencies in each port
- ▶ Encourage cruise lines to **distribute important environmental information on the destination** to passengers and crew members
- ▶ Establish a **Memorandum of Understanding** citing the environmental regulations for protection of Belize's coasts and sea and the commitment of the cruise industry to be aware and respective.
- ▶ Evaluation and promotion of : safe berthing and cast-off maneuvers, safety and sign posting for the port terminal, terminal infrastructure, piers and movement within the port tourist satisfaction, economic effects
- ▶ **Legal security for real estate investment in the port area**
- ▶ In order for hotels not to suffer from the growth in cruise passenger arrivals, Belize could positioned itself as a base port for cruise lines and therefore created an opportunity for the city's hoteliers.

SUSTAINABLE TOURISM MACRO PROGRAM – BUDGET ALLOCATION

National Sustainable Tourism Master Plan of Belize 2030



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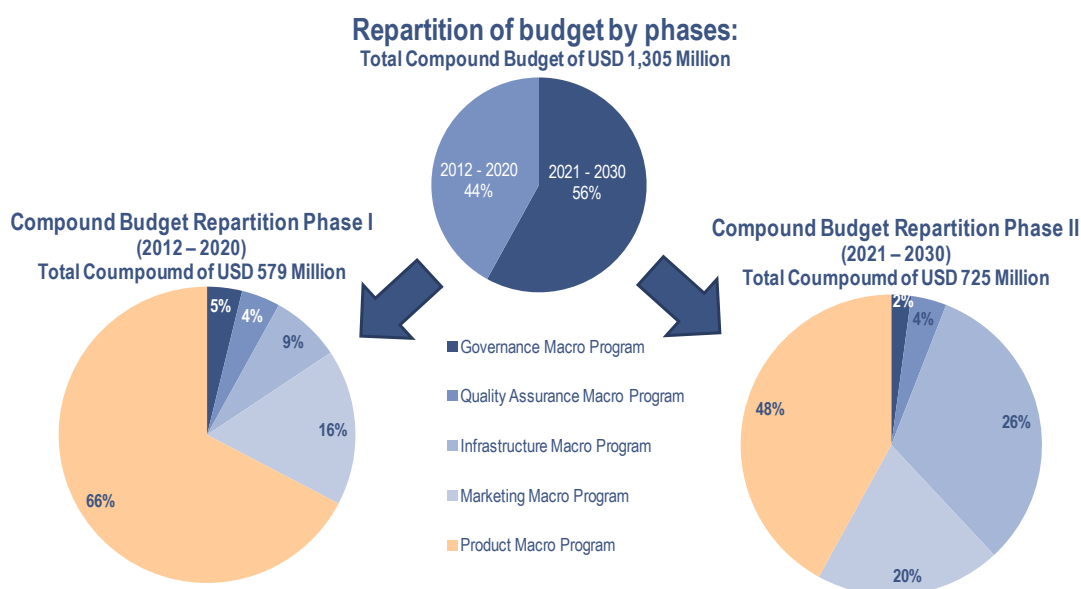
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1 Introduction

The following document presents the budget allocation by each of the National Sustainable Tourism Macro Programs and Sub-Programs and highlights:

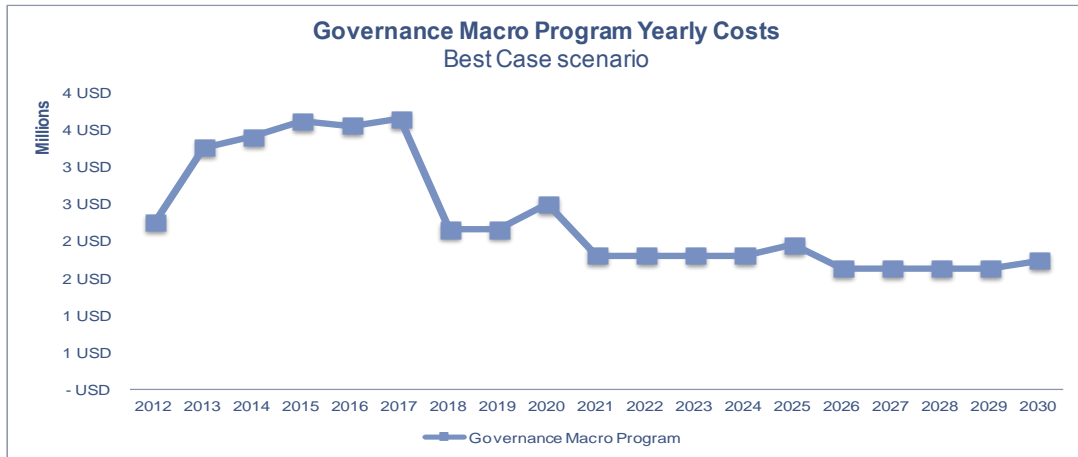
- ▶ The annual costs until 2030 for their implementation
- ▶ Their most cost intensive phases of investment, and
- ▶ Their budget repartition between the programs.

The total budget to be invested from 2012 until 2030 accounts for US\$ 1,305 Million of which USD 579 Million (44%) are scheduled to be invested between 2012 and 2020 and USD 725 (56%) between 2021 and 2030.

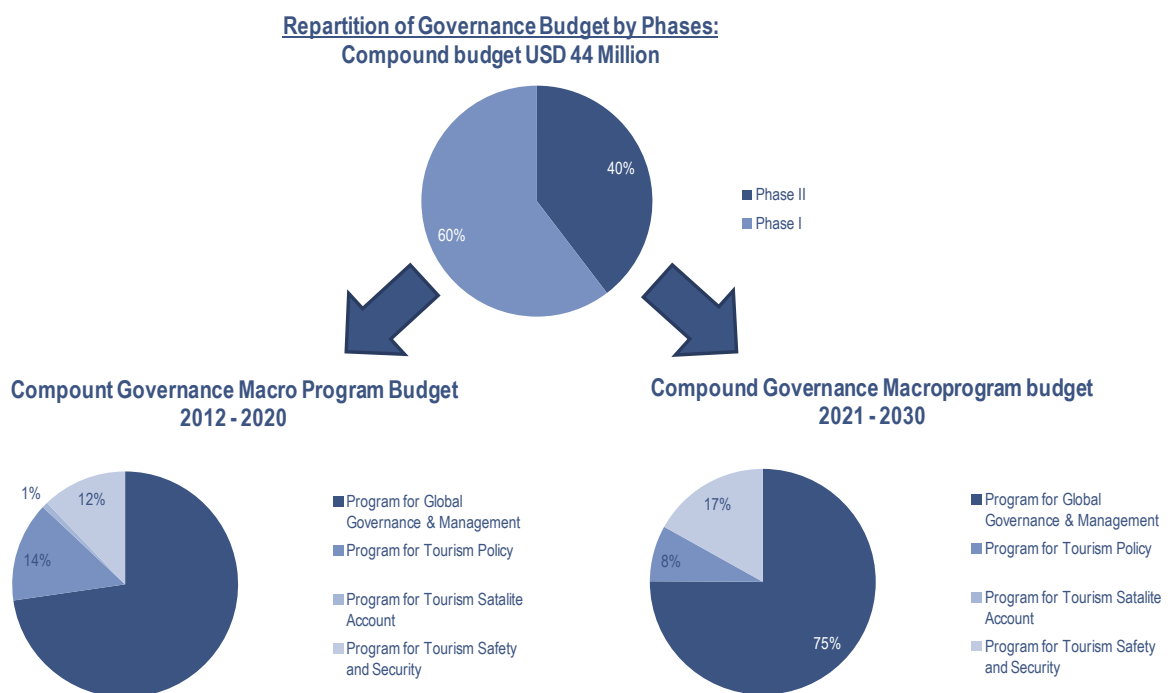


2 Governance Macro Program- Budget Allocation

The estimated preliminary budget for the Governance Macro Program will be a compound total of US\$49.78 million until 2030. The allocation evolution by macro-program will be as highlighted in the graph below:



The Governance Macro Program will mostly develop and initiate all its programs at the beginning of the development schedule, in order to put in place tourism policies, governance structures and tools to enhance sustainable tourism development. Therefore the macro program has most of its investments (60%) undertaken in the first phase of implementation from 2012 to 2020, whereas the investment share from 2021 to 2030 accounts for 40% of the entire macro program budget. Most of this financial resource will be invested into the Global Governance and Management Program's "Strengthening of Investment attraction and tourism SME development" sub-program accounting for 73% of the total Governance budget.

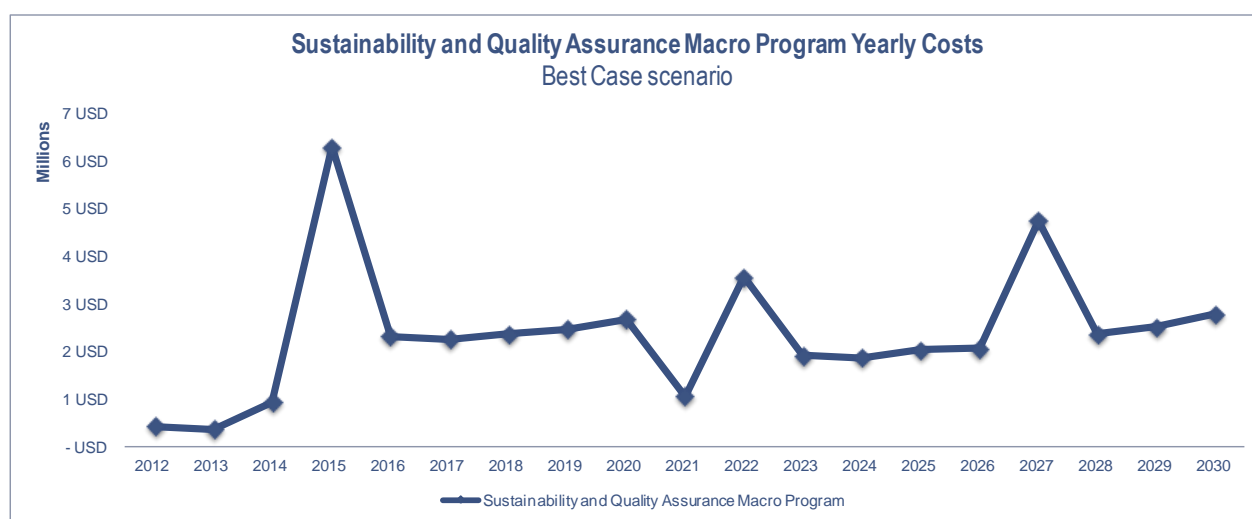


The entire process can be divided into two major phases:

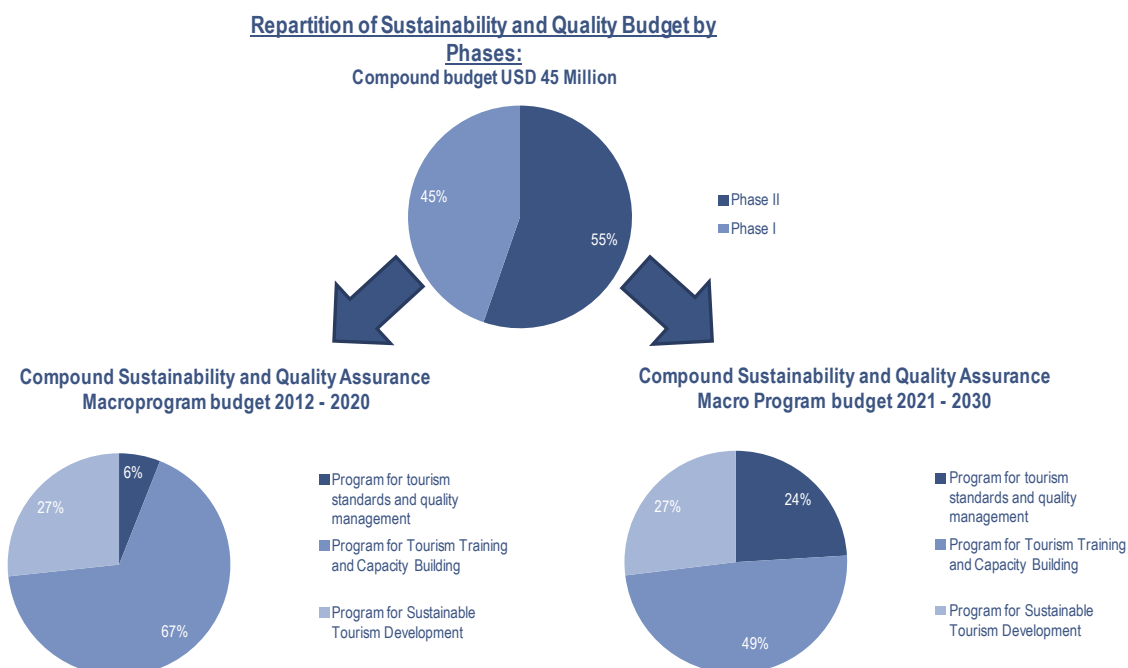
- ▶ **Phase 1. 2012 – 2020:** This phase allocates 60% of the total compound estimated budget for the Governance Macro Program (US\$26.5 million). The largest component of the budget will be investment in the Global Governance & Management Program followed by the Tourism Policy Program (14%). The Tourism Satellite Account and the Tourism Safety and Security program consume only 1% of the total Governance budget.
- ▶ **Phase 2. 2021 – 2030:** This second phase accounts for 40% of the entire Governance Macro Program (US\$ 17.4 million). In this phase the Tourism Satellite Account will have been already established and will be functioning without creating additional costs. The largest share of the investment is still the Global Governance & Management program followed by the Tourism Safety and Security program.

3 Sustainability and Quality Assurance Macro Program- Budget Allocation

The estimated preliminary budget for the Sustainability and Quality Assurance Macro Program will be a compound total of US\$45 million until 2030. The allocation evolution by macro-program will be as highlighted in the graph below:



The Sustainability and Quality Macro Program shows several investment peaks, however the split between the phases is almost even. The first phase (2012-2020) accounts for 44.7% of the Macro Programs budget and the second phase (2021-2030) for 55.3%. Its most financially demanding program is the Program for Tourism Training and Capacity Building requiring 59% of the total budget.



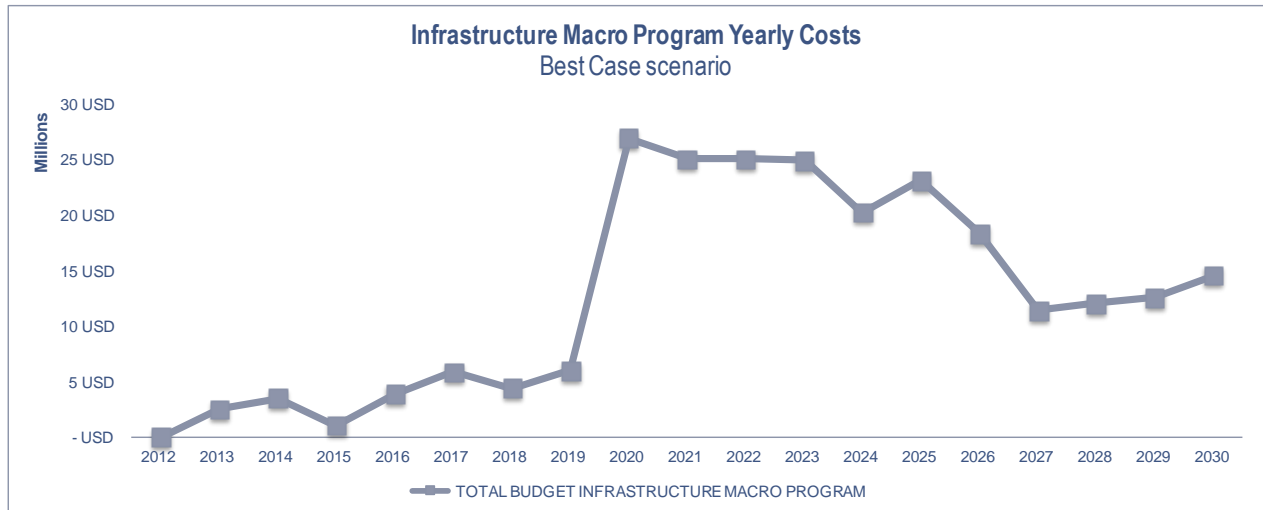
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The entire process can be divided into two major phases:

- ▶ **Phase 1. 2012 – 2020:** This phase allocates 44.7% of the total compound estimated budget for the Sustainability and Quality Assurance Macro Program (US\$20.1 million). The largest component of the budget will be the implementation of the Tourism Training and Capacity Program (with a share of 67%) which will establishment the foundation for the Excellence in Hospitality Training center the most important development during this period.
- ▶ **Phase 2. 2021 – 2030:** This second phase accounts for 55.3% of the entire Macro Program (US\$ 24.9 million). In this phase the contributions to the Tourism Training and Capacity Program will diminish. However, the program for sustainable tourism development remains activated with stable investments allocated. By 2021 the tourism standards and quality management program will have been launched and its first certifications and quality improvements will require 24% of the phase's budget.

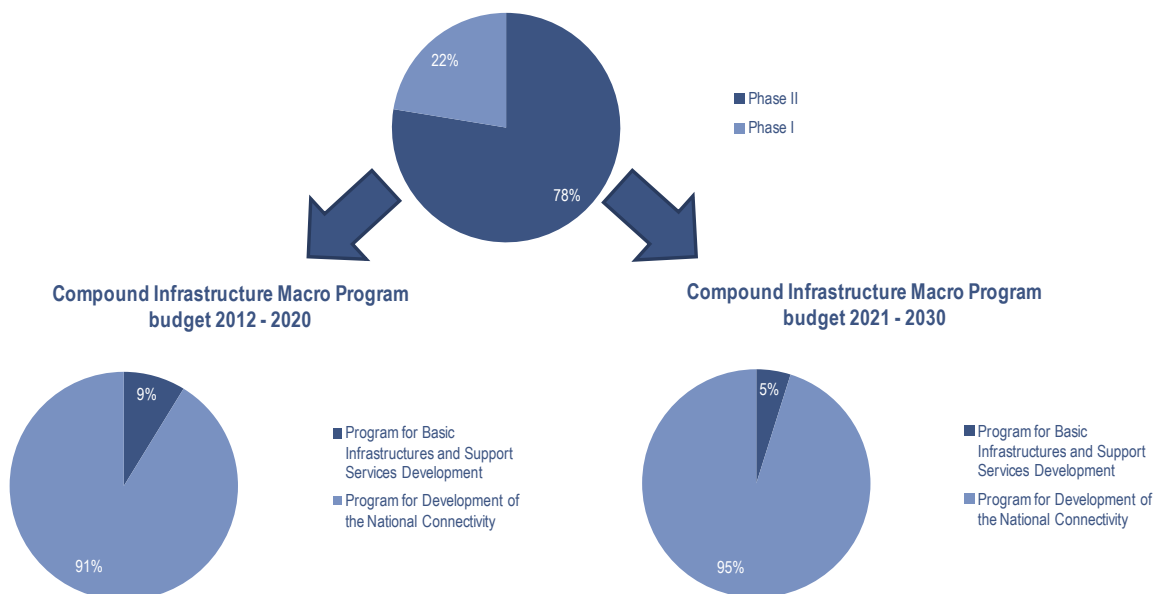
4 Infrastructure Macro Program- Budget Allocation

The estimated preliminary budget for the Infrastructure Macro Program will be a compound total of US\$241 million until 2030. The allocation evolution by macro-program will be as highlighted in the graph below:



The Infrastructure Macro Program shows slow evolution at first but starts its large investments by 2020, specifically concerned with land connectivity and road developments/improvements. The first phase (2012-2020) accounts for 22.4% of the Macro Programs budget and the second phase (2021-2030) for 77.6%.

Repartition Infrastructure Budget by Phases:
Compound budget USD 241.7 Million



The entire process can be divided into two major phases:

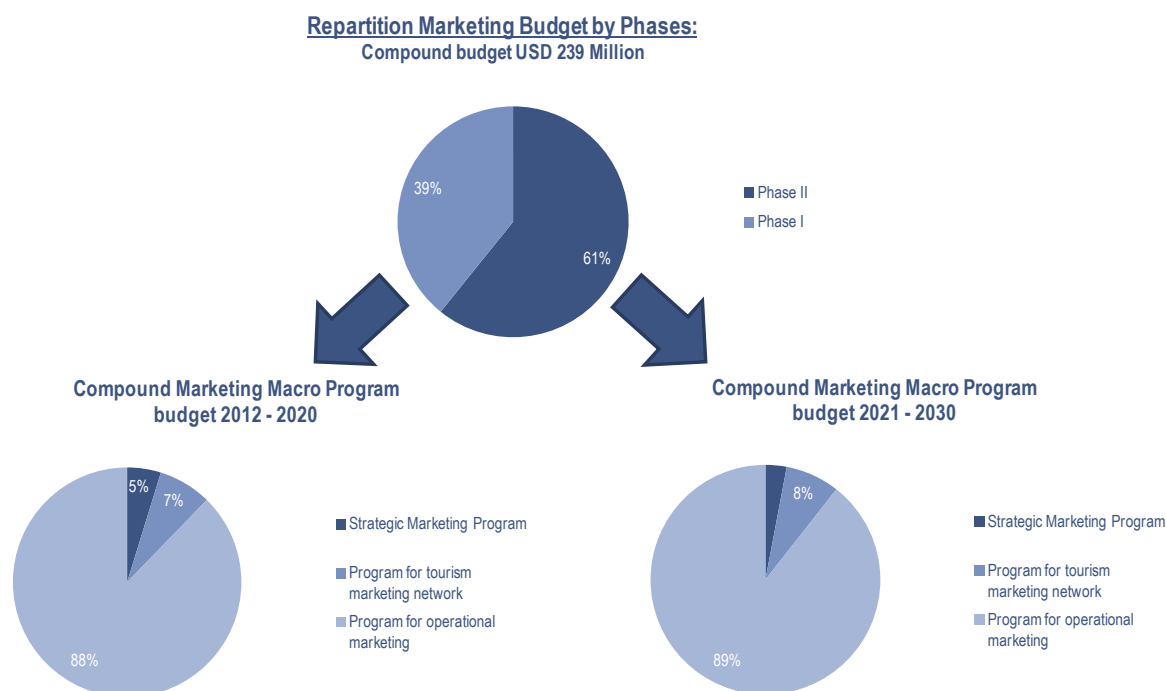
- ▶ **Phase 1. 2012 – 2020:** This phase allocates 22.4% of the total compound estimated budget for the Infrastructure Macro Program (US\$54.2 million). The great majority (91%) of the budget will be used for the development of the National Connectivity Program. The Infrastructures and Support Services Development will account for 9% of the phase's resources and include the enhancement of Belize's basic support service infrastructure such as waste management, energy supply, water treatment, sewage and drainage systems, etc.
- ▶ **Phase 2. 2021 – 2030:** This second phase accounts for 77.6% of the entire Macro Program (US\$ 137.3 million). In this phase 95% of the investments are further directed to the development of national connectivity by developing or enhancing access roads to existing or new destinations or tourism assets/sites. By 2021 the development of the basic infrastructures will still require financial resources, but their most important development will already have been implemented in the previous phase.

5 Marketing Macro Program- Budget Allocation

The estimated preliminary budget for the Marketing Macro Program will be a compound total of US\$239.6 million until 2030. The allocation evolution by macro-program will be as highlighted in the graph below:



The Marketing Macro Program shows a stepped investment pattern, increasing approximately every 5 years. The first phase (2012-2020) accounts for 39.2% of the Macro Programs budget and the second phase (2021-2030) for 60.8%.

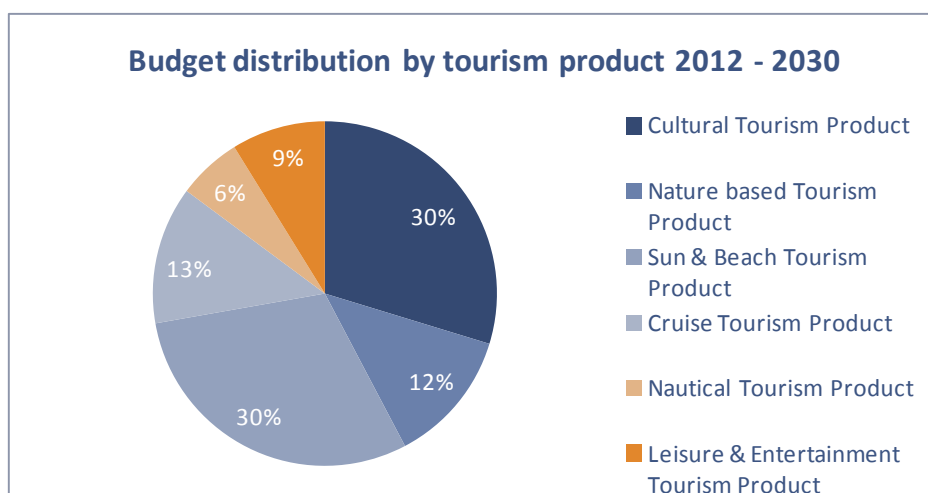


The entire process can be divided into two major phases:

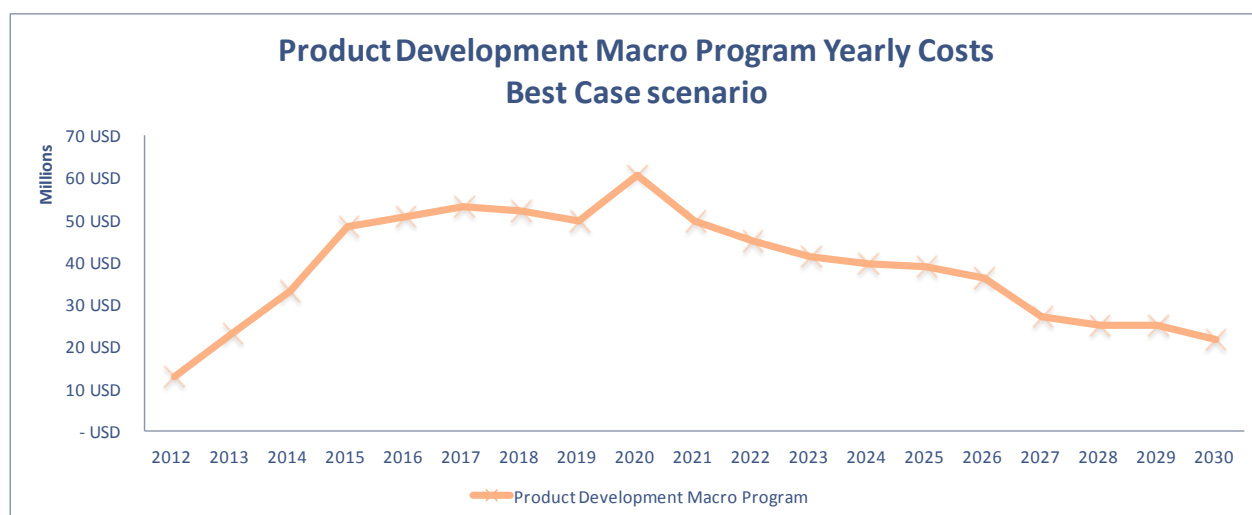
- ▶ **Phase 1. 2012 – 2020:** This phase allocates 39% of the total compound estimated budget for the Marketing Macro Program (US\$93.9 million). The great majority (88%) of the budget is attributed to the Operational Marketing Program. The rest is shared between the Strategic Marketing Program (5%) and the tourism Marketing Network development program (7%).
- ▶ **Phase 2. 2021 – 2030:** This second phase accounts for 60.8% of the entire Macro Program (US\$ 145.6 million). The strongest investment pole remains the Operational Marketing program with 89% of the phase's investments. By 2021 the development of the Strategic Marketing Program will account for 3% and BTB will further expand its tourism marketing network and invest 8% of the phase's budget.

6 Product Development Macro Program- Budget Allocation

The estimated preliminary budget for the Product Development Macro Program will be a compound total of US\$734.7 million until 2030 divided between the developments of each of the six tourism products. As shown in the pie chart below, culture and sun & beach tourism will be the tourism products requiring most investment shares, consuming 60% of the total Product Development Macro Program budget.

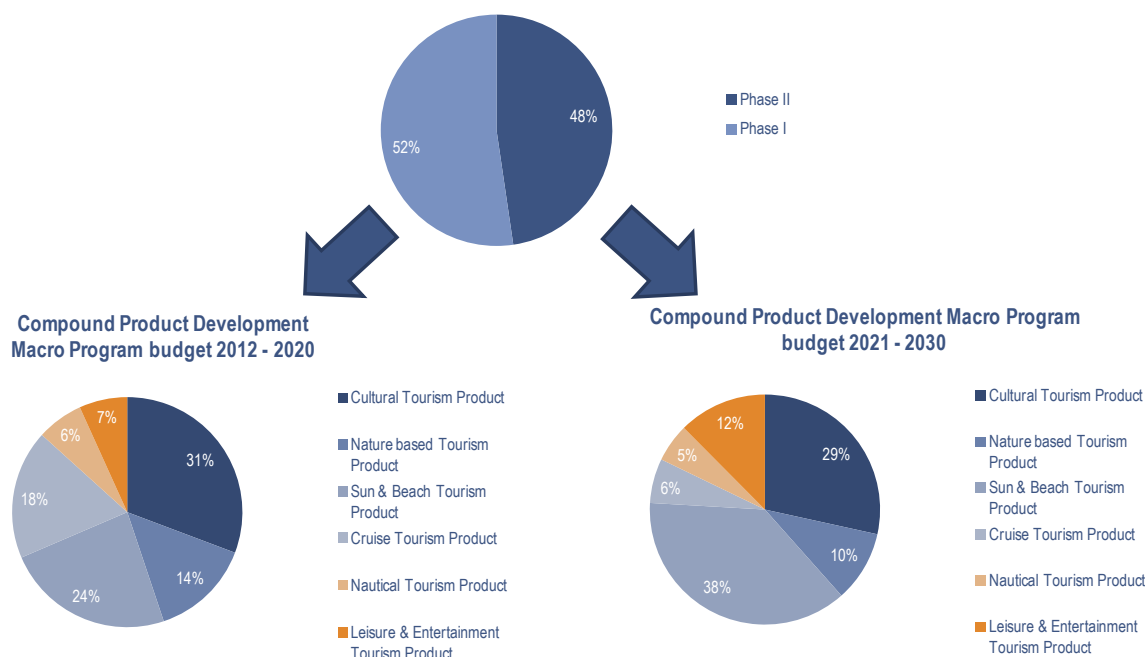


The annual allocation evolution by macro-program will be as highlighted in the graph below:



The Product Development Macro Program grows until 2020 and further on begins to decline. Both phases share approximately the same level of investment. The first phase (2012-2020) accounts for just over half of the budget, 52.3%, and the second phase (2021-2030) for 47.7%.

Repartition Product Development Budget by Phases:
Compound budget USD 734.7 Million



The entire process can be divided into two major phases:

- ▶ **Phase 1. 2012 – 2020:** This phase allocates 52.3% of the total compound estimated budget for the Product Development Macro Program (US\$384.3 million). The greatest share is invested into the cultural tourism product (31% of the budget) followed by sun & beach (24%) and cruise tourism (18%). The rest (27%) is allocated to nature based (14%), leisure & entertainment (7%) and nautical tourism (6%).
- ▶ **Phase 2. 2021 – 2030:** This second phase accounts for 47.7% of the entire Macro Program (US\$ 350.3 million). The strongest investment poles during this period are the developments of sun & beach tourism (38%) followed by culture tourism (29%) and leisure & entertainment (12%). Cruise tourism investment will mostly have already been finalized (especially in regards to the infrastructure programs) in the first period and there will only be investments in less intense investment programs such as marketing, and product specific capacity building. The opposite applies to the leisure & entertainment tourism product which finds its main development period in this phase.