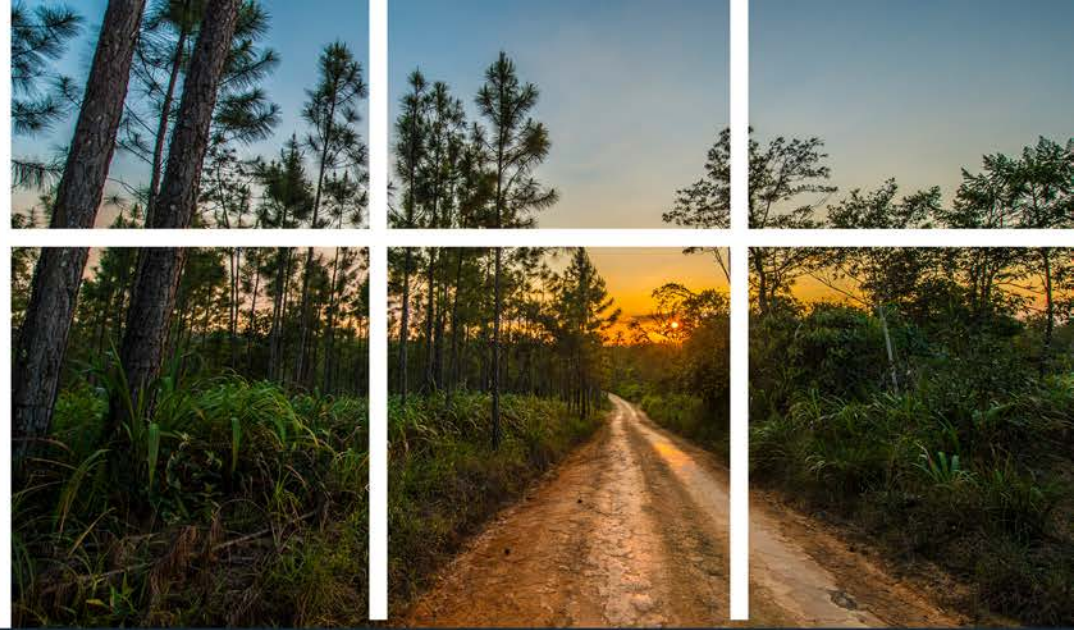
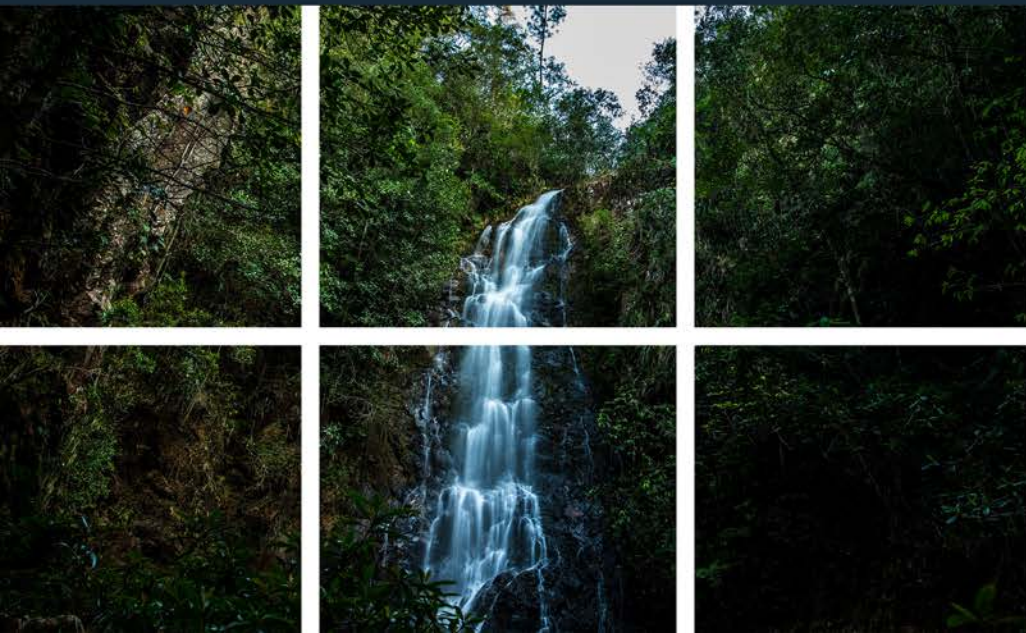


Belize's



NATIONAL TOURISM POLICY



MINISTRY OF TOURISM
& CIVIL AVIATION



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"Collaboration between private, public, and civil sector organizations is key for successful execution of the policy."

Minister's Message

As the Minister of Tourism, it is my distinct pleasure to present to you Belize's National Tourism Policy, which will guide the sustainable development of tourism for the next ten years.

Tourism in Belize has grown exponentially within the past decade. Tourism directly contributes to over 15% of GDP and directly supports over 21,000 jobs or 13.4% of total employment. Our overnight tourism arrivals is expected to reach a record high of half a million visitors in 2019 after growing over 14% in 2018. Similarly, cruise tourism numbers have remained steady at over one million cruise visitors for the past years and grew over 19% in 2018.

The National Tourism Policy is divided into six policy areas, namely marketing and market access; product development, management and conservation; the quality and safety of the visitor experience; investment, enterprise, skills and employment; destination planning and environmental management; and stakeholder engagement and coordination. The policy areas include specific policies for delivery and attainment of the vision of the National Tourism Policy, which is "Enhancing the quality of life of all Belizeans through a competitive and sustainable tourism

sector that delivers enjoyable, unique, and authentic visitor experiences."

To support the implementation of the policy, the Ministry developed the Responsible Tourism Implementation Plan (RTIP). The RTIP is a five-year strategic action plan focusing on implementation of the priorities of the National Tourism Policy through partnerships with national public, private and civil sector organizations.

The successful implementation of the policy will result in an increased contribution of tourism to economic development, more rewarding income, employment, and recreational opportunities to local communities and increased awareness and appreciation for Belize's natural and cultural heritage. The implementation of the policy will prompt support for conservation and will minimise negative impacts of tourism on ecosystems and local communities.

Collaboration between private, public, and civil sector organizations is key for successful execution of the policy. Local communities, Belizeans, and visitors also have important roles to play in delivering the implementation of the policy and as the Minister responsible for Tourism, I humbly ask for your support in the implementation of Belize's National Tourism Policy. Your National Tourism Policy.

Manuel Heredia

Honourable Jose Manuel Heredia, Jr.
Minister of Tourism and Civil Aviation

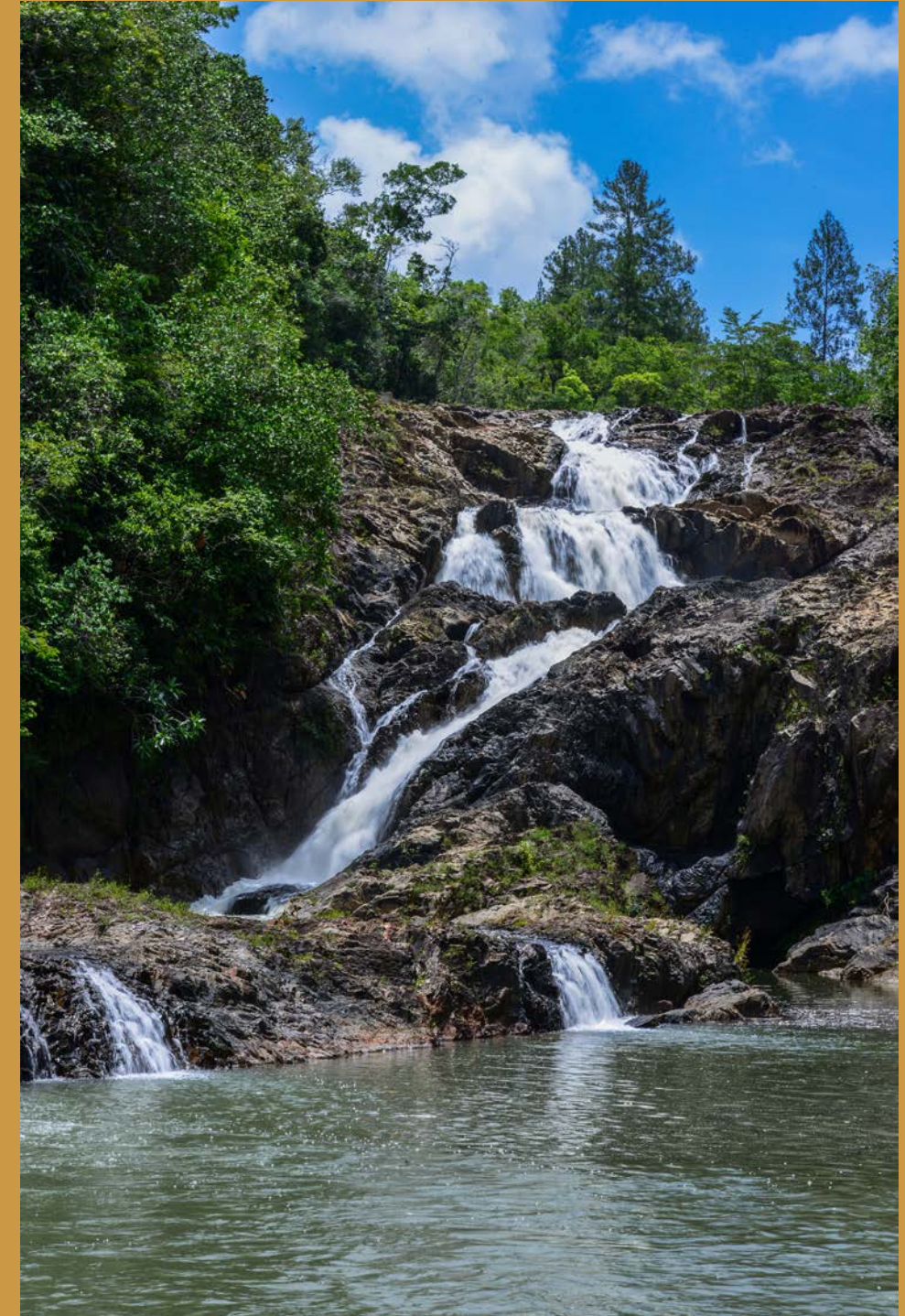
Acknowledgements

The National Tourism Policy revision process involved extensive consultations and discussions with tourism stakeholders throughout most of 2017.

The Ministry of Tourism and Civil Aviation recognizes and acknowledges the support received from our innumerable public, private and civil sector partners throughout the entire process. This included government ministries, local government authorities, international organizations, civil society, non-governmental organizations, and tourism associations. We would like to highlight the role of the Policy Working Group, which was instrumental in the decision making and provided guidance to the entire process. A heartfelt thank you is extended to the members of the working group, namely the Belize Tourism Board, the Belize Tourism Industry Association, the Belize Hotel Association, the National Institute of Culture and History, and the Association of Protected Areas Management Organization.

We also wish to thank our development partners, specifically the Inter-American Development Bank for their support in financing the Sustainable Tourism Program II, under which the National Tourism Policy revision was executed.

Last but certainly not least, our sincere gratitude to Dr. Richard Denman, author of this policy and to present and past Ministry of Tourism and Civil Aviation staff members who contributed to the process.



Acronyms

APAMO	Association of Protected Area Management Organizations
BCCI	Belize Chamber of Commerce and Industry
BTB	Belize Tourism Board
CTO	Caribbean Tourism Organization
EDC	Economic Development Council
EIA	Environmental Impact Assessment
FDI	Foreign Direct Investment
ITVET	Institute for Technical and Vocational Education and Training
LTC	Local Tourism Committee
MEYSC	Ministry of Education, Youth, Sports and Culture
MICE	Meetings, Incentives, Conferences and Exhibitions
MTCA	Ministry of Tourism and Civil Aviation
NICH	National Institute of Culture and History
NSTMP	National Sustainable Tourism Master Plan
NTC	National Tourism Council
NTP	National Tourism Policy
PACT	Protected Areas Conservation Trust
PGIA	Philip Goldson International Airport
SDG	Sustainable Development Goal
SITCA	Secretariat for the Integration of Tourism in Central America
SME	Small, medium and micro sized enterprise
TDT	Tourism Development Trust
UNEP	United Nations Environment Programme
UNWTO	World Tourism Organization
VEMS	Visitor Expenditure Motivation and Satisfaction
WTTC	World Travel and Tourism Council



Executive Summary

The National Tourism Policy for Belize sets out priorities and a direction for tourism in Belize for a ten year period to 2028.

Tourism is a major economic force in Belize, responsible for up to 38% of the country’s GDP¹ . As a sector that depends on the quality of Belize’s unique cultural and natural assets, tourism provides an essential bridge between their conservation and the delivery of economic prosperity in the country. The fact that Belize has an economy based on natural resources, with tourism creating the economic argument for conservation, is clearly recognised in the overarching development policy Horizon 2030. It is further operationalized in the Growth and Sustainable Development Strategy for Belize.

Tourism has been growing in Belize, with a steady increase in visitor arrivals over the last ten years that exceeds global and regional averages and surpasses previous targets set for the sector. However, there are also some weaknesses in its performance in terms of length of stay, level of spending and visitor satisfaction with value for money. Business performance remains uneven throughout the year and in different parts of the country. The sector also faces many challenges, such as the availability of skilled human resources, visitor safety, environmental management and the impact of climate change.

The vision of the National Tourism Policy, reflecting the 2030 vision within the National Sustainable Tourism Master Plan, is:

Enhancing the quality of life of all Belizeans through a competitive and sustainable tourism sector that delivers enjoyable, unique and authentic visitor experiences.

Belize claims to be a sustainable tourism destination. It is important to deliver on this claim. Therefore, the policy has been firmly based on international concepts of sustainable and responsible tourism. The core principles behind the policy are that tourism in Belize must be:

¹ Travel and Tourism Impact 2017 Belize, World Travel and Tourism Council (WTTC)

Competitive, balanced, resilient, socially inclusive, environmentally responsible, culturally sensitive and authentic, fulfilling and safe, accountable and transparent.

The overarching aims of the policy are to:

- Increase the value of tourism in Belize and its contribution to the national economy, through more and longer stays and higher spending per head
- Spread tourism activity and value throughout the year and to the different parts of Belize according to local capacity, needs and interests
- Provide rewarding income, employment and recreational opportunities for local people and communities, helping to alleviate poverty and increase local prosperity and wellbeing
- Raise awareness and appreciation of Belize’s natural and cultural heritage and support for its conservation, management and maintenance
- Minimise negative impacts on ecosystems and local communities arising from pressure on resources and environmental or social damage and degradation.



In order to achieve the aims, the following six key policy objectives have been identified to provide the basis and framework for functional policies and actions.

1) Marketing and Market Access

To enhance market knowledge and focus, improve the reach and effectiveness of promotional activity and strengthen market access to and within Belize

2) Product Development, Management and Conservation

To develop, enhance and maintain a diversified product offer that celebrates and protects Belize’s key natural and cultural heritage assets and expands the country’s market interest and appeal

3) The Quality and Safety of the Visitor Experience

To improve the quality of the visitor experience in Belize, ensuring that it is consistent, safe, enjoyable and reliable

4) Investment, Enterprise, Skills and Employment

To stimulate investment in the tourism sector, support small businesses, and improve skills training and career opportunities for all Belizeans

5) Destination Planning and Environmental Management

To strengthen the planning, development and management of local tourism destinations and the response of the sector to climate change and other environmental challenges

6) Stakeholder Engagement and Coordination

To strengthen stakeholder engagement in tourism governance at both a national and a local level, improve coordination, accountability and transparency and ensure effective delivery of the policy

Each of these policy objectives leads to a set of specific policies for their delivery, which are set out in the core sections of the policy document.

A fundamental requirement for the success of tourism in Belize and the implementation of the policy is more inclusive governance for the sector.



Proposals are set out for a new national structure to bring together relevant ministries and representatives of the private and civil society sectors. The policy also addresses the need to clarify the roles of the main tourism agencies, improve accountability and strengthen communication with tourism stakeholders.

Much of the policy is about strengthening resources and action at a local level in the different parts of Belize. The policy proposes greater empowerment of Local Tourism Committees in the delivery of locally agreed tourism development and management plans, with a system of improved vertical integration, coordination and support.

It is a policy for all tourism stakeholders, not just for government. It supports and does not replace the National Sustainable Tourism Master Plan 2030 which contains detailed plans and proposal for the development of the sector.

This will be a dynamic policy which requires regular monitoring, evaluation and review, supported by enhanced tourism data and leading to frequent reporting on its implementation. Based on this, the policy will be kept up to date, with a view to its comprehensive revision and replacement in 2028.

1. Introduction and Purpose

This National Tourism Policy document sets out the direction and policies for the tourism sector in Belize.

The purpose is to enable all government ministries, agencies, NGOs, tourism businesses, other relevant bodies and interested residents to understand the needs and opportunities of the tourism sector and the priorities for Belize, so that they can work more effectively together for its sustainable development.

The National Tourism Policy 2017 replaces the Tourism Policy published in 2005. It is a macro-level document relevant to a ten-year period (2017-2028). Micro-level and time specific action programmes should be developed from it. It adds weight and direction to the National Sustainable Tourism Master Plan 2012 – 2030 (NSTMP), which will continue to guide the planning and development of tourism at a national and local level. Revision and extension of legislation, if necessary, will be undertaken to support the delivery of the policy.

A fundamental component of the revised policy is the establishment of a more inclusive structure and process of tourism governance at both a national and a local level, with a reconstituted National Tourism Council and Local Tourism Committees bringing together different ministerial interests, municipalities, NGOs and representatives of the private sector. This is set out in Chapter 9 of this document.

The formulation of the policy has been supported by the Inter-American Development Bank through the Sustainable Tourism Program II. It has involved close consultation with tourism stakeholders in Belize, leading to an Assessment Report that formed the basis for workshops held across the country and on-line feedback.

The policy will be reviewed and renewed in 2028 prior to the production of a new Tourism Master Plan that will run from 2030.

2. Context of Tourism in Belize

This revised tourism policy for Belize has been designed to reflect international and regional tourism policy and to complement the overall policy direction of the country in sustainable development

and related sectors. It has also been informed by the recent trends and performance of the tourism sector and an assessment of tourism resources and challenges in Belize.

2.1 Policy Context

International and regional tourism policy

The *United Nations 2030 Agenda for Sustainable Development* recognises the role of sustainable tourism as a force for creating jobs and promoting local culture. This has been further elaborated and underlined by declaring 2017 as the **International Year of Sustainable Tourism for Development**, which provides a global agenda for tourism to deliver over the next decades.

The five themes of the International Year of Sustainable Tourism for Development 2017

- Sustainable economic growth
- Social inclusiveness, employment and poverty reduction
- Resource efficiency, environmental protection and climate change
- Cultural values, diversity and heritage
- Mutual understanding, peace and security

Tourism is also recognised as a key driver of economic growth in the **Caribbean** region¹. The regional strategic plan for the sector² is highly relevant to the situation in Belize and sets out priorities for marketing, product development, human

resources, investment, quality standards and transport, within the context of sustainable tourism, which are closely reflected in this policy for Belize.

Within **Central America**, the strategic plan for tourism³ focuses on marketing and promotion, political support for tourism, and quality and sustainability. It encourages more harmonised regional approaches and initiatives, within which Belize can play its part in line with its renewed tourism policy.

The national policy context in Belize

Horizon 2030, the overarching policy for development in Belize, calls for

a broad planning and inter-sectoral approach with policies anchored in the community. It seeks to deliver a high quality of life for Belizeans in harmony with the natural environment. In achieving this, the need for a sustainable and profitable tourism sector is specifically recognised. The emphasis placed by Horizon 2030 on resilience and looking to the long term, human resources and capacity building, local accountability and law enforcement, and a healthy environment as a basis for economic and social progress, is highly relevant to the tourism policy.

The **Growth and Sustainable Development Strategy 2016-19** provides more detail and medium term direction. It identifies four Critical Success Factors – optimal income and investment, enhanced social cohesion and resilience, sustained natural and cultural assets and enhanced governance and security. Tourism forms a key link between them, for example in generating income from the natural assets while providing a significant financial contribution to their maintenance and management. The Strategy identifies tourism as a Strategically Prioritised Sector for Development, setting out a range of specific actions for the sector that provide an important context for developing the tourism policy.



¹ Strategic Plan for the Caribbean Community 2015-2019

² A Strategic Plan for Tourism Services in CARIFORUM States 2017-2020

³ Strategic Plan for the Development of Sustainable Tourism in Central America 2014-2018

A range of subject and sector specific policies also have a bearing on tourism, including those identified in Table 2.1 below.

Policy area and key document	Implications for tourism
National Cultural Policy 2016 – 2026	Strong recognition of the link between culture and tourism, with opportunities identified for expanding and strengthening the offer through arts, crafts, events, festivals and creative industries as well as the sound management of cultural heritage sites.
National Environmental Policy and Strategy 2014 – 2024	Promoting the sustainable use of resources in order to achieve a green, clean, resilient and strong Belize that is a leader in environmental stewardship, requiring the tourism sector to significantly increase its engagement with environmental management.
National Protected Areas System Plan 2015	Identification of the opportunities and challenges faced by Belize’s extensive network of protected areas, calling for increased support for their conservation and management through the generation of income from tourism, through business partnerships and other mechanisms.
National Climate Change Policy, Strategy and Action Plan 2015	Identification of the considerable challenges arising from climate change and requiring that they are mainstreamed into sector policies, with a separate section identifying an adaptation strategy for tourism.
National Agriculture and Food Policy 2015-2030	Improving the performance of the agricultural sector and strengthening rural livelihoods, through market development that includes strengthening links to tourism via supply of local produce, food-related themes and promotion of agro-tourism.
Belize Integrated Coastal Zone Management Plan 2016	The systematic identification of pressures on the coastal zone from multiple uses, providing a framework and tools for more sustainable development and management of various activities including tourism.
Belize National Land Use Policy and Planning Framework 2011	Guidance towards environmentally and socially responsible use of land, providing a framework and participatory approach to planning and decision making on new development proposals including for tourism.

Tourism policy in Belize

The **Belize Tourism Policy 2005** aimed to improve quality of life for all Belizeans through tourism, strengthening local participation and partnership and promoting a market-driven approach. It set out objectives for sustainable tourism that have ongoing relevance. Policies were framed around four areas: product development, tourism destination linkages, marketing and promotion and destination management. These pointed to a need for balanced development between different product types, more investment and capacity building, improved marketing practices and better integration and coordination between sectors and delivery bodies. The broad thrust of the 2005 policy is still relevant but the revised policy needs to have the clarity, specificity, stakeholder engagement and follow-through that was previously missing.

The **National Sustainable Tourism Master Plan 2030** (NSTMP) was endorsed in 2012. It continues to provide a roadmap for tourism development in Belize. Strategic approaches address product development, destination development, quality enhancement and institutional strengthening. Goals and targets are set and an approach outlined for different target market segments. A key element is the Destination Physical Plan, which maps and describes a planning approach for Belize as a whole and for seven geographic areas in terms of the location, density and style of development. Detailed proposals are also set out for six main types of product, addressed in Macro Programmes which also cover governance, sustainability and quality assurance, infrastructure and marketing. This National Tourism Policy has been drawn up to be in line with the Master Plan, which provides the detailed guidance on many aspects of development.

2.2 Tourism Trends and Performance

The global and regional picture

Globally, tourism represents a major economic force, with 1186 million international arrivals generating some \$US 1260 billion in receipts in 2015 and accounting for 7% of the world’s exports in goods and services. It has also been steadily growing, with international arrivals increasing on average by 3.9% per annum from 2005 to 2015. While North America has mirrored world growth in this period it has been even stronger in Central and Southern America (5 to 5.3% p.a.) but lower in the Caribbean (2.4%). However, these figures mask shorter term variations, with the Caribbean seeing stronger growth in the last three years. Looking forwards, UNWTO forecasts are for global growth in arrivals to continue by 3.3% per annum to 2030, but at an ongoing faster rate in Central America (5.2%), so Belize has much to play for.

International arrivals and stays in Belize

- Belize has performed extremely well in terms of growth in arrivals in recent years but further scrutiny of visit patterns reveals some interesting points of strategic relevance:
- Arrivals for overnight/staying tourism grew on average by 7.1% per annum from 2010 to 2015, outstripping global and regional performance, with a pattern



- of steady, sustained growth (see Fig 1). This growth rate considerably surpasses that foreseen in
- the NSTMP (3.8%) suggesting that the latter’s target of 556,000 overnight arrivals by 2030 may well be exceeded.
 - Cruise arrivals also grew, but with a more fluctuating pattern. They have plateaued but are set to rise again. The 2016 level of around 1 million cruise arrivals was anticipated in the 2005 Tourism Policy. The NSTMP target of 1.5m cruise arrivals by 2030 may be exceeded.
 - The pattern of arrival shows seasonal variation with December to March considerably exceeding August to November. There has been some smoothing but seasonality remains significant.
 - Average length of stay by overnight tourists in 2015 was 6.6 nights¹. This has been declining in recent years and the trend goes against the target set in the NSTMP for a growth in length of stay from 8.4 nights in 2008 to 10.6 nights

¹ VEMS Survey, Belize Tourism Board

- in 2030.
- The distribution of international stays is very uneven around the country, with an estimated 44%² occurring in the two Northern Cayes and only 5% in the North mainland and 2% in Toledo.

The economic contribution of tourism in Belize

Tourism makes a major contribution to the economy of Belize, estimated at around 14% of GDP from direct visitor expenditure and as much as 38% if indirect and induced impacts are included³. Key trends and patterns in expenditure and aspects of economic impact are outlined below:

- By far the largest contribution to expenditure comes from international tourists, who spent an estimated \$US 377m in the country in 2016. However, domestic tourism expenditure, estimated at \$US 72m, is not insignificant⁴, which underlines the importance of integrating provision of tourism and recreational opportunities for Belizeans into the tourism policy.
- Over 85% of expenditure comes from overnight tourism, with under 15% from cruise visitors⁵. These proportions have

² ibid

³ Travel and Tourism Impact 2017 Belize, World Travel and Tourism Council (WTTC)

⁴ ibid

⁵ Belize Tourism Board

- remained similar over the last 10 years.
- Total expenditure by international visitors in Belize has grown significantly, by around 6.6% per annum in real terms since 2010, albeit with significant fluctuations year on year⁶. The expenditure targets set in the 2005 Tourism Policy have been significantly exceeded. Annual average growth in total expenditure, by both overnight and cruise visitors, is in line with the NSTMP targets.
- While growth in total expenditure by overnight tourists has kept up with growth in arrivals it has not exceeded it. This reflects the evidence that shows little growth in daily expenditure by overnight visitors, which was estimated at US\$ 155 in 2015 . Recent trends suggest that the NSTMP target for a real terms growth in spending per day by overnight tourists (to US\$ 213 by 2030) may not be met. However, growth in spending per cruise visitor, recorded at US\$ 78 in 2015⁷, may reach the NSTMP target (US\$ 90 by 2030).
- Overall, tourism’s contribution to Belize’s GDP rose by over two percentage points between 2011 and 2015. WTTC predicts that this will continue, with the total impact of tourism accounting for 43% of GDP by 2026. Similarly, its contribution to employment is predicted to rise from 34.8% (48,000 jobs) to 38.8% over the same period⁸.

⁶ WTTC op. cit.

⁷ VEMS survey, BTB

⁸ WTTC op. cit.

Performance of accommodation and other facilities

Data on occupancy and visitation from tourism businesses and facilities, although limited, provides an important indication of performance and need. Some key patterns include:

- A 30% rise in total hotel numbers between 2010 and 2016 (from 664 to 861) especially in the Northern Cayes, Cayo and South East Coast. Proportionately, growth in number of rooms was more limited and accommodation units are still largely small scale. In 2015 almost three quarters of all hotels had ten rooms or less, with only 13 hotels with more than fifty rooms.
- Average hotel occupancy remains relatively low in Belize, at 42.8% in 2015. However, this masks considerable differences in performance, with higher quality hotels reporting far higher occupancy levels.
- Occupancies are highest between December and March (50 – 55%) and lowest in September and October (23 – 28%). There has been little change in the monthly occupancy pattern over the last ten years.
- There is a significant variation in average levels of hotel occupancy between different geographical areas. In 2015, reported occupancies in the Northern Cayes and Central Coast averaged between 47 – 57% while in the North mainland, Placencia and Toledo they were between 20 – 35%. There is also considerable variation in average room rates, with much higher levels reported in Ambergris Caye than elsewhere.



- There is evidence of very considerable growth in visitation levels at certain sites. Total visits to eleven archaeological sites where consistent annual records have been kept, rose from 200,448 in 2010 to 337,835 in 2015. This equates to an average increase per annum of 11%.

Visitor satisfaction

An imprecise indication of visitor satisfaction is available from a limited visitor survey¹. Based on the percentages of respondents rating the experience as ‘good’ (shown below in brackets) the results in 2015 revealed:

- Least satisfaction: domestic transportation (63%), value for money (65%), entertainment (67%)
- Highest satisfaction: marine attractions (91%), national parks (87%), archaeological sites (86%)
- Amongst visitor services, tours scored most strongly (83%)², with accommodation (78%) restaurants (74%) international air connections (73%) and immigration services (73%) being less highly rated.

Conclusions from the evidence

In summary, the above evidence contains both positive and negative results. While volumetric growth in tourism arrivals has been impressive, the fact that average length of stay has declined, spend per head has fluctuated and the increase in value (in real terms) has not exceeded that in volume, as had been targeted, points to a strategic challenge for policy.

Business performance also remains patchy, with incidence of low occupancies. Ongoing seasonality and significant variations between the different geographic areas suggest that the revised policy should seek to spread tourism activity more evenly throughout the year and across the country.

While levels of satisfaction with Belize’s natural and cultural heritage assets are very encouraging, the results for certain services, and especially value for money, point to a need to improve the quality of the visitor experience and address cost/price issues in the interests of competitiveness.

¹ VEMS survey 2015, BTB

² A survey amongst cruise visitors in 2014-15 (BREA) also found high levels of satisfaction with the tours taken in Belize, with an average satisfaction score of 8.8 out of 10.



2.3 Tourism Resources and Challenges in Belize

The following brief overview of tourism resources and challenges in Belize provides a further context for the policy. It has been informed by extensive stakeholder consultation. More details on specific topics are included in the development of the thematic policy areas later in this document.

Belize is a highly attractive tourist destination. The NSTMP refers to its “unique value proposition and strategic location offering the best of Central American adventure and Caribbean flare”.

The country’s primary strength lies in the combination of a rich **natural and cultural heritage**. The terrestrial and marine environment, particularly the extensive rainforest and long, intact barrier reef, provide world-class opportunities for diving, snorkelling, wildlife watching and various outdoor activities. Belize has a widespread network of impressive Maya **archaeological sites** and other built heritage interest, as well as a diverse **living cultural heritage** through a multiplicity of ethnic groups and there is considerable potential for their further interpretation and access. A variety of bodies are responsible for the conservation and management of these heritage assets, which include over one hundred natural **protected**

areas (visited by a large majority of all incoming tourists) and many designated cultural sites. However, their resources are limited and pressures from tourism use and other activities are increasing, presenting challenges in the short and long term.



Cultural and nature-based tourism are just two of six tourism **product concepts** identified in the NSTMP. The other four (sun and beach tourism, cruise tourism, nautical tourism and leisure and entertainment) provide opportunities to diversify the visitor experience. Recent work has been undertaken in these product areas as well

as on more specific niche products. Relating product offers to target markets and establishing effective **brand propositions** is an ongoing task. This also requires close attention to market opportunities and access, including issues of **airlift and connectivity** which currently remains dominated by US routes, albeit with growing regional linkages.

Accommodation, catering, guiding and other **facilities and services** are largely provided by independent and often small-scale operators and there are few internationally branded facilities. New forms of provision are emerging based on the sharing economy, presenting opportunities as well as management challenges. While there are many examples of operators delivering an exceptional visitor experience, **quality** remains mixed and inconsistent. Competitiveness and value for money compared with other destinations are

important concerns for the sector in Belize. Visitor **safety** and crime levels also present significant challenges.

Belizeans are friendly people offering a natural warmth of welcome. However, the tourism sector faces many **human resource** issues, notably in the availability of skilled labour.

There are concerns about the level of interest in the sector amongst young people and perceptions of tourism as a career. There is a need to strengthen **investment** in the sector amongst new and existing businesses, support small enterprises and expand engagement in the tourism value chain within local communities. Potential new funding mechanisms, used in other countries, provide opportunities to be pursued, as identified in the NSTMP and elsewhere.

The NSTMP set out a plan for integrated **destination development**, identifying the broad approach in each of seven geographic areas. The advent of local destination development plans in many parts of Belize has provided a new opportunity for coordinating and delivering action but they require stakeholder support and resources for their implementation. Many areas are suffering from poor local **infrastructure**, including transport and other services. Stronger land use **planning policies** and processes are also required to direct and control development, notably in the light of **climate change** which presents a major threat to the future of tourism in Belize, especially on the coast. Levels of **environmental management** remain insufficient in local destinations and individual businesses.



The importance of tourism is well recognised in national policy, as identified earlier. Many players are implicated within government, NGOs and the private sector. However, there are issues with the amount of **stakeholder engagement**, coordination and mutual accountability. This may require new or improved **governance structures** at both a national and local level, with clearer identification and mandating of roles and responsibilities.



2.4 Summary SWOT Analysis for Tourism in Belize

Strengths

- Combination of Central American and Caribbean cultures and experiences
- Small yet varied country – easily assimilated
- Rich combination of culture, nature and sun/maritime offer
- Unique, extensive and intact barrier reef and abundance of uninhabited natural cayes
- Impressive, interesting and beautifully located archaeological sites
- Significant marine and land based nature interest – coverage of protected areas
- Friendly people and laid-back atmosphere
- English speaking – easy to communicate
- Variety of different ethnic/cultural groups
- Some high-quality and sustainably managed facilities and resorts
- Good connectivity to USA and internal air services, plus growing regional linkages
- Many public and private bodies and NGOs involved in and aware of tourism
- Supportive national policies



Weaknesses

- Inconsistent quality and weak enforcement of quality/safety standards
- Limited availability of quality hotel/ resort rooms at certain locations and times
- Beaches limited and unexceptional
- Opportunities to experience local living culture not clearly presented
- Limited percent of handicrafts made in Belize and accurately identified as such
- Undistinguished and often weak food offer
- Insufficient provision of skills and training
- Lack of direct flights from Europe
- Patchy and poorly maintained local information and signposting
- Poor road-based public transport services
- Poor environment, infrastructure and destination management in some places
- Limited business engagement with environmental/sustainability management and incentives for investment
- Relatively high prices for medium quality for many services and facilities
- Lack of clarity and coordination of policies and roles in delivery of tourism

2.4 Summary SWOT Analysis for Tourism in Belize

Opportunities

- Forecasted ongoing global tourism growth, especially in Latin America
- Ongoing, growing market interest in nature, culture, activities and experiences
- Some cultural sites and themes not yet opened-up or interpreted to visitors
- Extensive rainforest, cave systems and other natural areas for sensitive access
- New forms of facility provision and booking, including the sharing economy
- Recent and future IT advances offering potential for creative use in marketing, products and management
- Potential new funding mechanisms to support investment in the sector
- Regional policies and initiatives for sustainable tourism development
- National Sustainable Tourism Master Plan providing a framework for development
- Recent focus on local destinations and destination development plans



Threats

- Climate change and associated environmental and social challenges
- Degradation of destinations and sites from overuse or poor management
- Loss of character and appeal as a result of overcrowding from cruise tourism
- Insufficient resources for conservation and management
- Intrusive, inappropriate or excessive development in tourism or other sectors
- Unresolved and increasing safety and security issues
- Lack of competitiveness, with better quality and value for money in other countries
- Insufficient levels of investment in improvements or new product
- Lack of industry involvement in ensuring fair regulations and their enforcement
- Insufficient stakeholder engagement
- Local, regional and global economic, political and environmental uncertainties

3. Vision, core principles, and policy aims and objectives

The vision of the National Tourism Policy, reflecting the 2030 vision within the National Sustainable Tourism Master Plan, is:

Enhancing the quality of life of all Belizeans through a competitive and sustainable tourism sector that delivers enjoyable, unique and authentic visitor experiences.

3.1 Vision

The National Sustainable Tourism Master Plan contains the following 2030 Vision Statement:

Belize is an exclusive multicultural sustainable destination in the Central American Caribbean. It is a destination where the authenticity and friendliness of its people, coupled with the uniqueness of an exotic natural environment can be actively experienced within a conserved world.

Sustainable – Authentic – Unique – Competitive.

The vision of the National Tourism Policy, reflecting the 2030 vision within the National Sustainable Tourism Master Plan, is:

"Enhancing the quality of life of all Belizeans through a competitive and sustainable tourism sector that delivers enjoyable, unique and authentic visitor experiences."

The four broad objectives of the NSTMP, set out below, are also relevant to the Policy:

- *Optimization:* Optimize socio-economic benefits from tourism
- *Sustainability:* Undertake a sustainable and planned tourism development
- *Competitiveness:* Achieve competitiveness as a world-class destination
- *Leadership:* Support Belizean stakeholders in taking leadership over sustainable tourism development.



3.2 Core Principles

The core principles behind Belize’s tourism policy draw on the longstanding and widely promoted international principles of sustainable and responsible tourism. As such, the country embraces these development approaches, and adopts the following definitions for both:

Sustainable tourism has been defined as: “Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry the environment and host communities”¹. It emphasises the need for tourism to be economically viable while minimising resource use and environmental impact and meeting the needs of future generations. It also requires that the human rights of all peoples are recognised and respected.

Responsible tourism also seeks to deliver tourism that is sustainable, as identified above, while placing an emphasis on individual responsibility, involvement of local people, providing all visitors with an enjoyable and meaningful experience and being culturally sensitive.

The above two terms overlap but are also mutually reinforcing and can both be applied relevantly to tourism policy in Belize.

Therefore, based on these principles, tourism in Belize should be:

- **Competitive.** Tourism businesses and the sector as a whole must be economically viable and able to compete effectively in the marketplace.
- **Balanced.** Tourism should be well integrated with rest of the economy, avoiding over-dependency on the sector or particular types of product or market.
- **Resilient.** Tourism planning and development should look to the long term, building in an ability to adapt to environmental and other changes.
- **Socially inclusive.** Tourism should provide opportunities for residents and visitors of all kinds, without discrimination by gender, race,

- religion, sexual orientation, disability or in other ways.
- **Environmentally responsible.** Tourism should be responsible for its global and local impacts and respect the integrity of ecosystems in which it occurs, avoiding and minimising the use of scarce and precious resources and the generation of waste and pollution and contributing to the conservation, management and maintenance of natural assets.
- **Culturally sensitive and authentic.** Tourism development and activity should uphold the human rights of all Belizeans and respect local cultural traditions, avoiding degradation and providing visitors with a meaningful and authentic experience.
- **Fulfilling and safe.** Tourism development and operations should ensure the well-being, safety and security of visitors, employees and the local communities in which it occurs
- **Accountable and transparent.** The planning, management and development of tourism should involve businesses, other stakeholders and local communities affected by it. All responsible agencies should be accountable to the stakeholders for their actions and be open and transparent in their reporting of them.

The above principles are in close harmony with the fundamentals for sustainable development for Belize as expressed in Horizon 2030.



¹ UNWTO and UNEP Making Tourism More Sustainable, 2005

3.3 Policy Aims and Objectives

The following policy aims and objectives are identified for tourism in Belize, in line with the vision and core principles.

They are closely aligned with the direction set by Horizon 2030 and the Growth and Sustainable Development Strategy which recognise the crucial role of tourism as a force for prosperity that links together the economy and the environment. The emphasis placed by Horizon 2030 on the resourcefulness of Belizeans and on delivering a high quality of life for them is also important for the tourism policy, which gives priority to supporting local initiative and providing opportunities for local people.

The overarching aims of the tourism policy in Belize are to:

- Increase the value of tourism in Belize and its contribution to the national economy, through more and longer stays and higher spending per head
- Spread tourism activity and value throughout the year and to the different parts of Belize according to local capacity, needs and interests
- Provide rewarding income, employment and recreational opportunities for local people and communities, helping to alleviate poverty and increase local prosperity and wellbeing
- Raise awareness and appreciation of Belize’s natural and cultural heritage and support for its conservation, management and maintenance
- Minimise negative impacts on ecosystems and local communities arising from pressure on resources and environmental or social damage and degradation

These economic, social and environmental aims are interrelated and cross-cutting. Many specific tourism policies and actions are relevant to a number or all of these aims.

In order to achieve the aims, the following six key policy objectives have been identified to provide the basis and framework for functional policies and actions, reflecting the core principles and strengths and weaknesses of the sector and the opportunities and threats that it faces.



1) Marketing and Market Access

To enhance market knowledge and focus, improve the reach and effectiveness of promotional activity and strengthen market access to and within Belize

[Key related principles: Competitive, Balanced]

2) Product Development, Management And Conservation

To develop, enhance and maintain a diversified product offer that celebrates and protects Belize’s key natural and cultural heritage assets and expands the country’s market interest and appeal

[Key related principles: Competitive, Balanced, Environmentally responsible, Culturally sensitive and authentic]

3) The Quality And Safety Of The Visitor Experience

To improve the quality of the visitor experience in Belize, ensuring that it is consistent, safe, enjoyable and reliable

[Key related principles: Competitive, Fulfilling and safe]

4) Investment, Enterprise, Skills And Employment

To stimulate investment in the tourism sector, support small businesses, and improve skills training and career opportunities for all Belizeans

[Key related principles: Competitive, Socially inclusive, Fulfilling and safe]

5) Destination Planning And Environmental Management

To strengthen the planning, development and management of local tourism destinations and the response of the sector to climate change and other environmental challenges

[Key related principles: Resilient, Environmentally responsible]

6) Stakeholder Engagement And Coordination

To strengthen stakeholder engagement in tourism governance at both a national and a local level, improve coordination, accountability and transparency and ensure effective delivery of the policy

[Key related principles: Balanced, Socially inclusive, Accountable and transparent]

Each of these policy objectives leads to a set of specific policies for their delivery. These are presented in the chapters that follow.



4. Marketing and Market Access

To enhance market knowledge and focus, improve the reach and effectiveness of promotional activity and strengthen market access to and within Belize

Effective marketing is a critical requirement in achieving more growth in tourism value in Belize in general and in different areas and seasons of the year. It is also relevant to other aims in seeking to increase awareness and participation amongst Belizeans and to convey and gain benefit from the sustainable tourism approach in messages and communication.

Policies in this area take account of the NSTMP’s Marketing Macro-programme which addresses strategic and operational marketing, including connectivity.

4.1 Market Intelligence and Targeting

Resources for marketing are limited. Action needs to be well informed and carefully focussed on where it can be most effective.

The policy is to:

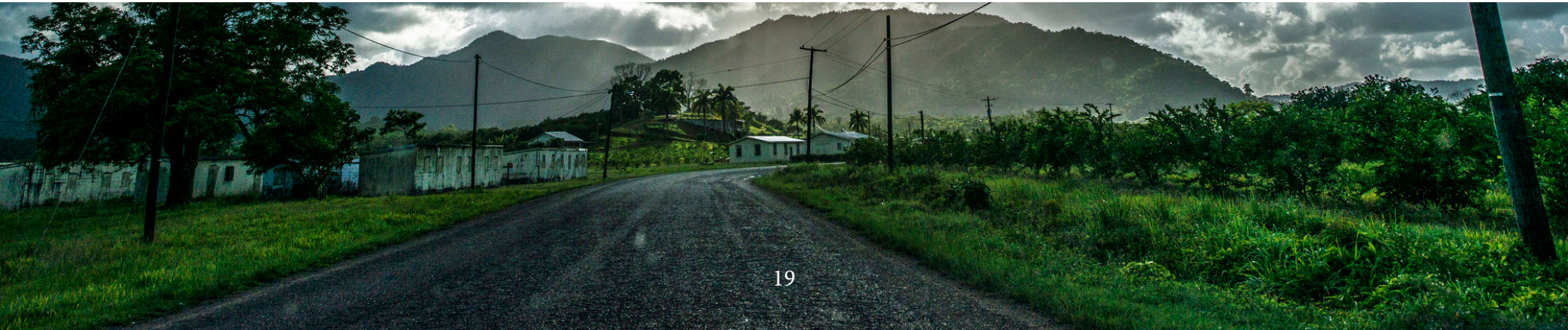
- a. Establish and maintain regularly updated information on key source markets, their interests, requirements and trends
- b. Prioritise those markets that show an affinity with the product in Belize while also exhibiting potential to stay longer, spend more and visit in the off-season.
- c. Retain a focus on the primary source markets in the USA and Canada but also target selected Mexican, Central American, South American and European markets in order to build new bases, exploit identified growth and reduce risk from too narrow a market exposure.
- d. Research the opportunities and benefits presented by certain special interest and niche markets and pursue those exhibiting greatest viability and potential for Belize.
- e. Consider sustainability issues in selecting target markets.
- f. Include domestic market as a target, focussing on opportunities for Belizeans to take holiday breaks and trips in different parts of the country at different times of year and to learn about the products and experiences available and pass this knowledge on to others.
- g. Increase frequency of visits, length of stay and spending by visitors with particular reasons to come, including Belizeans living abroad, business visitors and visits to friends and relatives
- h. Maintain reliable and accessible data and feedback on tourist arrivals, length of stay, motivations, profile, spending, where stayed, activities, and satisfaction with different experiences and facilities, so to guide future product development and marketing.
- i. Share market intelligence transparently with tourism stakeholders, to enable them to improve their product and marketing focus and to engage with joint marketing activity.



4.2 Tactical Marketing Activity

A marketing programme is required to stimulate visits and spending from the target markets and achieve growth and spread of tourism value in Belize. Policies should seek to ensure that tactical marketing is as effective and efficient as possible, with positive engagement of stakeholders and networks at all levels. The policy is to:

- a. Maintain a clear brand position and identity for Belize that reflects its core values (sustainable, authentic, unique and competitive) and is relevant to target markets.
- b. Ensure that the brand and associated messages are based on reality and can be delivered, avoiding over-claiming, with consequences for product development and management policies and actions.
- c. Establish a high level of awareness of the brand within Belize and guide the use of it by tourism stakeholders in their marketing.
- d. Identify and project associated sub-brands for tourism products and local destinations.
- e. Manage the content of marketing material and communications to ensure that the distinctive local destinations within Belize and the differentiated experiences that are available there are clearly and creatively identified.
- f. Promote reasons to visit Belize at all times of year, notably in the off-season, according to the facilities and experiences that are available and including a schedule of events.
- g. Make effective use of embassies and other overseas offices of Belize in providing and promoting accurate and up-to-date information about the country, together with more specific and dedicated tourism promotion services and representation in key source markets.
- h. Maintain an active promotional campaign supported by a portfolio of high quality, striking and informative marketing material, including a highly visible on-line presence and making maximum use of evolving information technology and social media platforms.
- i. Implement a media management plan that supports the brand and enables swift and positive response to crises or potential reputational risk.
- j. Foster close relationships with the international and domestic travel trade and media through travel shows, familiarisation visits, promotions and joint initiatives to promote Belize.
- k. Strengthen access to information by residents and tourists in Belize through a network of visitor information centres (which may also include facilities and interpretative displays) and improving destination knowledge and communication skills within tourism businesses and other services.
- l. Improve directional road signs in conjunction with the Ministry of Works and establish and maintain a comprehensive system of visitor signing to attractions and throughout destinations.
- m. Provide opportunities for stakeholder engagement and partnership in marketing campaigns.
- n. Pursue opportunities for regional collaboration in destination marketing with CTO, SITCA and other bodies, as well as further opportunities for local cooperative marketing that may arise.



4.3 Market Access and Transport Connectivity

Connectivity is a critical issue for the growth of the tourism economy. The competitiveness of Belize in international markets is very dependent on ease of access, which can affect propensity to visit and length of stay. A key aspect is the number of air routes and the frequency, convenience and cost of services, as well as their ability to achieve sufficient load factors to secure ongoing viability. Air services from North American cities have been growing, as have regional routes but in 2017 there were no direct services from Europe. Cross-border linkages and internal connectivity by air, sea and land transport are highly important in encouraging and enabling the spread of tourism to different parts of the country but is affected by various infrastructural challenges. Provision of docking facilities for cruise ships is also a component of market access provision, further elaborated in Section 5.3.

The policy is to:

- a. Establish and maintain strong links between tourism and transport ministries, agencies and operators in the development and execution of policy, including between this National Tourism Policy and the National Transport Plan.
- b. Continue to negotiate air service agreements with international and regional jurisdictions to boost the potential for increased airlift to Belize.
- c. Develop and maintain relationships with air

- carriers including in the formation and promotion of the tourism offer.
- d. Work with regional partners on common issues and opportunities, such as minimising layover time at transit hubs and improving the percentage of same-day arrivals.
- e. Improve the infrastructure and human resource capacity and management at PGIA and at domestic airports to meet international standards and enable expansion of timetables and services.
- f. Improve connectivity with the more remote destinations, including road access and the frequency and competitive pricing of domestic air services.
- g. Implement a systematic programme of road surface maintenance and upgrading to access important tourist sites.
- h. Make more of ferry and water taxi services as incoming and internal transport links, including addressing any issues of visitor safety and the quality of the visitor experience.
- i. Improve the quality of busses and the routing, scheduling and frequency of bus services to meet the needs of tourists, especially at all points of entry/exist and key logistical hubs, taking opportunities to work with private operators where practicable.
- j. Provide up-to-date information on public transport routes and timetables, including on-line.
- k. Encourage and support improvements to the availability, quality, safety and value for money of taxi and rental car services and new transport modes such as ride share schemes.
- l. Minimise visa restrictions for entry into Belize and provide a warm welcome and friendly and efficient handling procedures at all points of arrival.



5. Product Development, Management and Conservation

To develop, enhance and maintain a diversified product offer that celebrates and protects Belize’s key natural and cultural heritage assets and expands the country’s market interest and appeal

Product development is the core component of the NSTMP. This policy objective recognises the need to have a diversified product offer that is competitive, world class and capable of attracting the identified target markets.

At the same time, the policy recognises the supreme importance of Belize’s unique cultural and natural heritage assets as the primary basis for that product offer and therefore the fundamental requirement of their conservation in the interests of the country’s current and future tourism. This must be of primary concern in the development of products based on these themes.

In addition to culture and nature-based tourism, the NSTMP identifies four further product types: sun and beach, cruise, nautical and leisure and entertainment. These, and other types of offer, also require careful, well planned development and management.

Policies in this area are key to securing and spreading tourism value but equally are about delivering on other cultural, social and environmental aims. These product policies also relate closely to policies for destination planning and environmental management set out in Chapter 8.

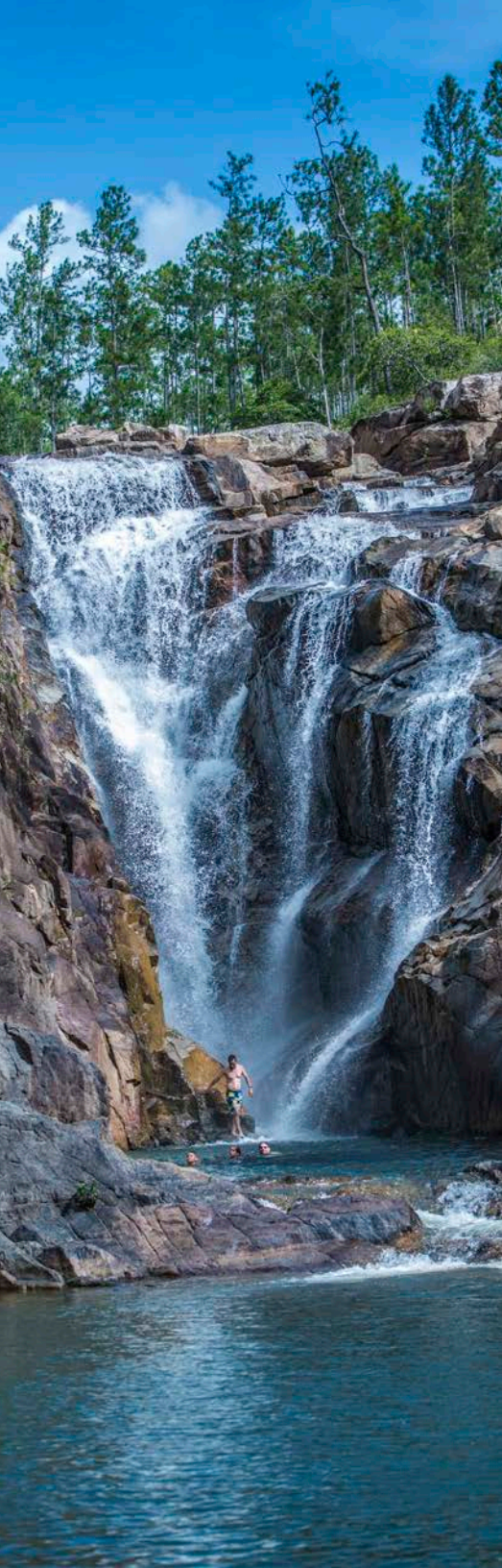
5.1 Cultural Tourism

Cultural heritage is a key product differentiator for Belize. The main component of the offer is the wide network of Maya archaeological sites, but this is complemented by other built heritage features such as buildings from the colonial era. The country also has a rich resource of living cultural heritage from various ethnic groups, linked to a contemporary creative arts and music scene, which could be much more accessible to visitors. Tourism policy in this area needs to relate closely to the Belize National Cultural Policy 2016 – 2026, helping to deliver on its aims.

The policy is to:

- a. Provide an authentic experience of Belizean culture to visitors, avoiding cultural damage and commodification and generating enhanced economic and social benefits to related local communities.
- b. Maintain strong links between culture and tourism ministries and agencies which are mandated to plan, develop and manage cultural development in Belize.
- c. Establish and follow a plan for a phased future expansion and management of visitor activity at heritage sites, including those not yet opened, which guides recreation-based tourism as a conservation and business model while also identifying sites which should have no or restricted access.
- d. Improve access roads and visitor infrastructure at selected sites, as required, while avoiding developments from tourism or other activities within or near sites that may harm their integrity.

- e. Avoid over-use and damaging impact to cultural sites through effective monitoring and management, including relevant training and enhanced recreational management capacity.
- f. Pursue opportunities to increase financial resources from tourism for the conservation and management of cultural heritage sites, including admission fees, sponsorship, donations and income-earning activity, such as trading, concessions and visitor gifting, while ensuring that funding raised is retained for local use.
- g. Encourage beneficial opportunities for public-private partnerships, co-management of sites or attractions and the granting of concessions for tourism operations, which meet agreed sustainability criteria.
- h. Ensure high standards of visitor communication, including providing specialised guide training on culture-related topics and identifying appropriate qualification requirements.
- i. Work with local communities, including those close to heritage sites or with a strong cultural identity, on opportunities to gain more benefit from tourism, including providing facilities and services to visitors and interpreting their heritage to them, for example through guided visits, displays and events.
- j. Take full account of the rights of all ethnic groups concerning the use and protection of traditional practices, cultural heritage and intellectual property and support their engagement in, and benefit from, tourism.
- k. Enhance the visitor experience and appreciation of heritage sites through creative and innovative interpretation, including using sites as venues for related living cultural heritage events and activities.



- l. Increase the availability, quality and diversity of locally-made artisanal products for sale to tourists that reflect cultural heritage traditions and demonstrate contemporary creativity, providing capacity building and support for producers and assistance with access to markets.
- m. Broaden visitor experiences of local culture, with links to other sectors such as traditional agricultural products, gastronomy and development of food tourism.
- n. Support existing and new cultural and creative events and festivals, with capacity building, standards, product development, information and promotion to visitors, including maintaining and promoting a calendar of events and assistance with scheduling to minimise clashes and encourage a full year-round

5.2 Natural Heritage and Protected Areas

Belize has a rich abundance of terrestrial and marine wildlife, habitats and wilderness areas much of which are within designated protected areas. While there is an increasing market interest in nature-based tourism, soft adventure and more challenging experiences in natural areas, the product in Belize is not fully developed. There is provision for wildlife watching, outdoor activities, exploration and adventure tourism, and potential for its improvement, coordination and sensitive expansion. There is also provision and potential for accommodation and visitor centres offering nature-based activities and wilderness experiences, often with a focus on wellness.

The link between tourism and nature conservation has been long established in Belize, partly through the payment of the Tourism Conservation Fee. However, the protected areas, which are managed by a variety of bodies, are under-resourced and face significant financial and management challenges. These are highlighted and

- programme.
- o. Create linkages between heritage sites and points of cultural interest and activity, through the identification and promotion of themed trails, supported by visitor facilities and services.
- p. Support the wellbeing of cultural producers, performers and artists and the protection of intellectual property rights.
- q. Ensure that visitors respect cultural traditions and avoid damage to or removal of artefacts, including provision of relevant advice and codes of conduct.
- r. Encourage tourism businesses to make use of artisanal products and to host and promote cultural activities.
- s. Support the creative marketing and packaging of cultural tourism offers and experiences.

addressed in the National Protected Areas System Plan, which provides an important context for this component of the tourism policy.

The policy is to:

- a. Collaborate with management agencies to provide visitors with a memorable experience of Belize’s natural areas and wildlife, with minimal environmental impact, while raising awareness and support for conservation and bringing economic and social benefits to local communities.
- b. Foster a close and supportive working relationship between the ministries and agencies responsible for tourism and natural heritage, including MTCA, BTB, Forestry and Fisheries Departments, PACT, APAMO and relevant NGOs and management bodies.
- c. Work with relevant authorities to develop a Natural Heritage Plan for Recreation and Tourism in

- Protected Areas, prioritizing or rationalizing the use of some areas for tourism and establishing limitations for use and development in others.
- d. Build capacity of management organizations in recreational management, business management, visitor management, etc.
- e. Support robust management models and practices that identify carrying capacity, limits and criteria for use of sites and related monitoring and management processes, including communication of regulations and guidelines and application of penalties for misuse.
- f. Pursue opportunities to increase financial resources from tourism for the conservation and management of natural heritage sites, including admission fees, sponsorship, donations and income-earning activity, such as trading, concessions and visitor gifting, while ensuring that funding raised is retained for local use.
- g. Encourage and support good quality and innovative investment in appropriate infrastructure, trails, signage, visitor centres, interpretation, activity equipment and other facilities in natural areas, including concepts for ecotourism and adventure centres and routes identified in the NSTMP.

- h. Encourage beneficial opportunities for public-private partnerships, co-management of sites or attractions and the granting of concessions for tourism operations, which meet agreed sustainability criteria.
- i. Ensure high standards of visitor communication, including providing specialised guide training on nature-related topics and identifying appropriate qualification requirements.
- j. Work with local communities, including those within and close to natural heritage sites and protected areas, on opportunities to gain more benefit from tourism, including providing facilities and services to visitors and interpreting the natural heritage to them.
- k. Promote local/species specific guidelines for sustainable wildlife viewing and maintaining the wellbeing and security of species, based on international guidelines, and ensure adherence to them in Belize.
- l. Resist pressures to de-classify or encroach upon natural protected areas which would diminish this vitally important resource for tourism.
- m. Support the marketing of natural sites and nature-based visitor offer, through relevant campaigns and packages, technical support and the production of promotional materials.

5.3 Cruise Tourism

Belize is a frequent destination for cruise ships in the Caribbean and cruise tourism is identified as a key product in the NSTMP. The cruise market has seen significant regional growth with new ships adding to the capacity and further growth predicted. Its development in Belize, as elsewhere, has been controversial, with widespread concern about the impact on the character of the destination as well as recognition of the economic rewards. The 2005 Tourism Policy pointed to the identification of separated sites and attractions for cruise passengers. The policy now favours a more integrated approach with cruise passengers providing a valuable source of income for mainstream operations.



A positive policy towards further development of appropriate forms and levels of cruise tourism will be pursued, recognising the economic advantages and promotional opportunities it brings for longer stay return visits. However, this requires very careful management to avoid high volumes of visitors causing undue pressure on sites and facilities and affecting the appeal of the destination to overnight visitors and local quality of life.

The policy is to:

- a. Maintain a specific Cruise Tourism Development and Management Plan that is based on stakeholder consultation, kept under regular review, and supported by improved data on arrivals, movements, impacts, responses and projected growth.
- b. Keep abreast of market trends and external variables that affect the cruise industry.
- c. Make sure that any planned growth in ship arrivals and passenger numbers is controlled and carefully managed and falls within identified limits.
- d. Maintain a maximum limit on the number of cruise passenger arrivals onshore per day.
- e. Optimise revenue from passenger expenditure and ancillary activity, such as servicing the ships.
- f. Provide high quality reception, handling, information, entertainment, retail and other facilities for cruise passengers arriving in Belize, especially in the capital city as outlined in the NSTMP, with berthing facilities prioritised in the general cruise corridor of Belize District.
- g. Encourage a high percentage of locally owned and managed facilities and services that cater for cruise passengers, optimising local benefits and providing a Belizean experience for guests.
- h. Ensure that all cruise passengers have a

positive experience of Belize and seek to convert them and their contacts to become overnight visitors to Belize.

- i. Develop new products to be offered to cruise passengers, in line with market opportunities.
- j. Manage and publicise the scheduling of ship arrivals and of passenger movements on shore, to limit total volumes of visitors to within the identified capacity of sites and facilities and to enable non-cruise visitors to avoid peak times.
- k. Develop standard operating procedures for the management of tour operations outside the ports and collaborate with managers of sites visited by cruise passengers to set carrying capacities.
- l. Set mandatory requirements for cruise liner operations in Belizean waters, including environmental management and docking procedures, with regular monitoring of compliance and outcomes.
- m. Establish and maintain a structure for on-going dialogue with cruise company representatives and shore-based services, to facilitate future planning and management.
- n. Seek to attract high value and specialist cruise markets and provide appropriate facilities and services for them, including pocket cruises as identified in the Master Plan.





5.4 Sun and Beach Tourism

The sun and beach experience is a highly important component of the visitor appeal of Belize. Although in itself it is not a strong differentiator of Belize in the market place, it combines well with the cultural and natural heritage product to provide a winning offer. However, there is a need to improve the quality of facilities and infrastructure and address various management challenges.

The policy is to:

- a. Establish and implement plans for the phased development and management of visitor-orientated waterfronts in coastal towns and villages, providing a visually appealing, safe, walkable experience with a range of catering, retail and other facilities and attractions.
- b. Set and enforce standards for beach management, including bathing water quality and safety measures, reflecting international standards
- c. Establish agreements with tourism stakeholders for the management of revenue generating opportunities in beach areas
- d. Encourage and support the provision of practical and attractive visitor infrastructure on waterfronts and beaches, including signage, information, toilets and garbage disposal
- e. Address social impacts on waterfronts and beaches arising from noise pollution, beach trading, visitor behaviour etc. through relevant guidelines and regulations

- f. Plan for and support the development of high quality sun and beach resorts in selected locations, reflecting the NSTMP
- g. Address issues of coastal zone management, beach and shoreline erosion and other impacts of climate change through improved planning, development control and management policies as set out in Chapter 8.

5.5 Nautical Tourism

Nautical tourism is a relatively new product opportunity for Belize that was specifically identified in the Master Plan. The objective is to encourage the Caribbean sailing and boating market to be based in Belize or to make more and longer visits, using their own boats or rentals.

The policy is to:

- a. Plan for and support investment in a network of marinas and sailing clubs around the country, providing attractive facilities and services for boat users.
- b. Ensure a high quality of information and welcome for visiting boats, including any necessary simplification and facilitation of immigration regulations and handling procedures.
- c. Promote and enforcing clear regulations and guidelines on boat maintenance and handling, including safety and environmental management practices.
- d. Improve mapping and promotion of navigation routes and promotion of them.



5.6 Leisure and Entertainment

The provision of a good quality, well managed leisure and entertainment product, including a combination of catering, shopping, cinemas, performance venues, nightlife and gaming, as appropriate, is important in enhancing the country's year-round 24-hour offer and stimulating higher levels of spending per head.

The policy is to:

- a. Identify, plan and develop a small number of integrated leisure and entertainment areas, as proposed in the NSTMP, including in locations accessible to the cruise and cross-border markets.
- b. Promote and control the development and ongoing management of leisure and entertainment areas to maintain their quality and safety, through the use of concessions, management agreements, public-private partnerships and regulations.
- c. Link leisure and entertainment provision to the cultural offer, as covered under section 5.1 above

5.7 Other Forms of Product Offer

Belize has a considerable opportunity to develop, expand and improve a range of other types of product. Their development should be geared towards the overall aims of generating higher value, longer stays and year round appeal and spreading spending to all parts of Belize.

The policy is to:

- d. Research and pursue product opportunities in high-spend markets that are not seasonally dependant.
- e. Pursue opportunities to develop products linked to other sectors of the economy, so helping to optimise value-added and widen the range of stakeholders benefitting from tourism growth.
- f. Identify product gaps and opportunities in the MICE market (meetings, incentives, conferences and exhibitions) and support the necessary investment in venues and other facilities
- g. Work with the medical sector to research, establish and promote medical tourism in Belize.
- h. Work with landowners, farmers, food producers and local communities to further develop agritourism products, including site visits, retailing, catering and accommodation.



6. The Quality and Safety of the Visitor Experience

To improve the quality of the visitor experience in Belize, ensuring that it is consistent, safe, enjoyable and reliable

The quality of the visitor experience of Belize overall and of specific facilities and services is fundamental to the competitiveness of sector. It is critical in influencing length of stay and the likelihood of making return visits and recommendations, affecting the reputation and performance of Belize as a destination and of

individual businesses. Quality and safety issues in local destinations are also important for wider social sustainability reasons, reflecting the core principle of social inclusiveness and ensuring the security and wellbeing of visitors and residents.

6.1 Quality and Safety of Facilities and Services

There is widespread recognition of the need to raise the standards of quality and safety of Belize's tourism facilities and services and to make them more reliable and consistent. This was an important topic for the 2005 Tourism Policy and remains so in 2017. It is also reflected in the Tourism Standards and Quality Management Programme of the NSTMP.

The policy is to:

- a. Have agreed mandatory minimum standards that cover safety requirements and a baseline level of provision for a range of types of tourism facility and services, in line with international standards.
- b. Have agreed guidelines and ratings, where appropriate, for quality levels and good practice above the minimum.
- c. Extend coverage of standards and guidelines to all tourism sub-sectors including accommodation, catering, tour guiding, attractions and activities, broken down for more specific types of operation as necessary.
- d. Relate licensing requirements to minimum standards and regularly review them to ensure that they are fair, relevant and practically attainable, including by small scale individual providers.
- e. Simplify, clarify and unify mandatory quality standards and other regulations and standards applied to tourism operators, to reduce complexity and facilitate compliance.
- f. Focus on increasing enforcement of standards, with more efficient and better resourced inspection processes and application of penalties for non-compliance, which should be reviewed and extended where necessary.
- g. Ensure that tourism businesses are represented and engaged in the drawing up of standards and guidelines and that sector bodies and individual businesses accept ownership of them and responsibility to encourage and promote compliance amongst their members or peers.
- h. Enhance the collection and analysis of visitor satisfaction levels, consumer feedback and customer-generated ratings, which are of major and growing importance in the tourism sector, and make effective use of this as a tool and incentive for raising quality.
- i. Mount regular thematic campaigns to address particular safety topics or raise quality levels in different types of tourism business, with a particular priority given to catering/gastronomy, marine safety and high-risk activities.
- j. Review and strengthen the enforcement of standards and regulations placed on and between tour operators and tour guides, including safety requirements and liability insurance cover.
- k. Include the upkeep and appearance of public facilities and environments as an aspect of visitor experience quality (see Chapter 8).
- l. Recognise the role of capacity building and investment as critical tools for improving safety and quality (see Chapter 7).

6.2 Visitor Security and Community Relations

Crimes against tourists and their possessions, although infrequent, are a serious issue in Belize and have been increasing, leading to concerns about reputational damage to the Belize tourism brand. The cost of providing security presents a challenge for local communities and individual businesses. In part this is a two-way process, with some problems arising as a result of visitor behaviour or social tensions related to tourism growth.

The policy is to:

- a. Ensure that policies in the wider fields of justice, education and social security reflect the needs and issues in the tourism sector, with increased efforts made to enforce law and order, deter criminality and secure convictions against wrongdoers.
- b. Raise awareness of visitor security and behavioural issues within local communities, seeking their vigilance and support, while also underlining the importance of tourism and the local benefits that it brings.
- c. Encourage and support local tourism businesses and other stakeholders to engage in safety and security measures on their own properties and in relation to local sites and destinations, including networking and mutual support between them.
- d. Provide visitors with relevant information and practical guidance on ways of reducing risk and on avoiding inappropriate behaviour, and seek the involvement and support of tour operators, guides and tourism businesses in this.
- e. Strengthen the ability of the Tourism Police Unit and the regular police

services to carry out their role as informers and enforcers, providing capacity building on communicating with visitors, increasing human and financial resources where required, and providing the Unit with timely information on visitor movements and events that may require extra levels of policing.

- f. Take specific steps to combat tourism-related alcohol and drug abuse, sexual harassment and other anti-social behaviour, perpetrated by or inflicted on visitors.
- g. Commit to the ECPAT¹ Code and take measures to combat sex tourism and human trafficking.
- h. Establish and maintain a disaster and crisis management plan for the tourism sector, recognising that while safety and security issues should be at the heart of this it needs to cover wider economic, social and environmental issues.
- i. Strengthen visitor security and safety procedures by tour and transport operators, including maintaining passenger manifests and enabling tracking of vehicle and boat movements through use of enhanced technology.

¹ The Code of Conduct for the Protection of Children from Sexual Exploitation in Travel and Tourism



7. Investment, Enterprise, Skills, and Employment

To stimulate investment in the tourism sector, support small businesses, and improve skills training and career opportunities for all Belizeans

This policy objective is about engaging with businesses and individuals to encourage and support them in taking the opportunities that tourism provides in Belize and securing the aimed for growth in value. It is central to the aim of providing rewarding income and employment opportunities, alleviating

poverty and increasing local prosperity and wellbeing, reflecting core principles of both competitiveness and social inclusiveness as well as balance and economic integration.



7.1 Tourism Investment and Business Support

Tourism accounts for a significant proportion of the FDI that occurs in Belize. However, more investment is needed in the sector, especially in the provision of more high quality accommodation capacity. Barriers remain high and starting a tourism business can be difficult and expensive in Belize. There is a particular need to provide necessary support for local investors and the operators of small businesses. Dedicated incentives for investment in the tourism sector are not currently provided in Belize but can be found in other countries.

The policy is to:

- a. Work with Beltraide, the BCCI, EDC, Ministry of Finance and other relevant agencies on the promotion of investment opportunities in tourism and the provision of business support.
- b. Keep abreast of the investment climate affecting tourism, including perceptions of Belize as a location for investment and the problems faced by investors.
- c. Provide a transparent and efficient process for foreign and local investors, with a positive identification of opportunities in tourism and the types of project sought (assisted by the NSTMP), clarity on regulations and criteria to be met, and timely and efficient administration.
- d. Encourage and support investment by existing businesses and operations to expand, improve and upgrade their properties, facilities and services, as well as in new developments.
- e. Support a range of investment models as may be best suited to different needs and opportunities, including public-private partnerships, as identified in the NSTMP Tourism Governance Macro Programme.
- f. Offer financial incentives, through tax reductions, grants or credit, for specific types of tourism investment that meet identified priorities at any one time and that comply with identified development, operational and environmental standards.
- g. Provide mechanisms for raising and disseminating funds for tourism investment and for progressing development projects, including work with finance agencies and the creation of a National Tourism Development Trust (See Chapter 9).

- h. Rationalise and simplify the taxation and regulatory burdens on tourism businesses, while making them more equitable and reducing leakage and non-compliance.
- i. Pay particular attention to the needs of locally owned and small tourism businesses in making investments and obtaining finance, including providing access to business advice and support.
- j. Ensure that locally owned and operated tourism businesses are actively promoted and supported and do not face inequitable competition from incoming operations and investors.
- k. Make the most of the expanding sharing economy, including home based accommodation and other informal tourism services, as a way of delivering tourism income to more Belizeans, while addressing issues of fair competition, impact on capacity, consumer protection and social impact.
- l. Strengthen links into the tourism value chain from agriculture and fisheries, other economic sectors and local communities, through the supply of products and services.
- m. Review regulations that may prevent individuals with business skills and financial resources from contributing to tourism.
- n. Meet international banking standards and address problems, such as those relating to currency exchange and use of credit cards, that have a damaging impact on the tourism sector.



7.2 Capacity Building and Career Development

The availability of human resources with the necessary skills and aptitude to provide a quality service in the tourism sector is a major challenge for Belize. At the same time, the provision of good career opportunities supported by capacity building is a key to spreading prosperity through tourism. Ensuring ‘decent work’, with fair pay and conditions, is a central pillar of the global sustainable development goals against which the tourism and hospitality sector sometimes falls short.

The policy is to:

- a. Prioritize and safeguard employment opportunities and careers for local Belizeans.
- b. Undertake and keep up-to-date a comprehensive training needs assessment for the sector which is also broken down by types of tourism and by geographic area.
- c. Address a wide range of skills requirements, including hospitality management, catering skills (identified as a priority in 2017), customer care, on-line and digital skills, general communications, and less traditional topics such as destination awareness and environmental management.



- d. Consider needs at all levels, including management, and in all types of service where there is contact with visitors or impact on the sector.
- e. Strengthen language skills in all jobs involving communication with visitors.
- f. Continue to broaden and deepen the coverage of guide training, including specialised knowledge to support key products and niche experiences and the delivery of multilingual programmes.
- g. Improve the ability, resources and status of the ITVETS in delivering practical tourism training courses across Belize, while also identifying the role of other suppliers such as Beltraide-BTEC and University of Belize within a coordinated system for tourism capacity building.
- h. Ensure a high and consistent level of skills and practical experience amongst lecturers and trainers in the tourism sector across the country, with use of similar training materials, syllabuses and standards of qualifications awarded.
- i. Pursue, if needed and appropriate, new training facilities such as a possible Hospitality Vocational Training Centre as identified in the NSTMP.
- j. Ensure that training is accessible and affordable, using on-line delivery where appropriate.
- k. Address issues with the general education level of school levers in meeting the sector’s needs.
- l. Focus on engaging young Belizeans in tourism, including campaigns in schools and elsewhere to promote careers in the sector.
- m. Persuade, and if necessary incentivise, tourism businesses to provide and facilitate training for their employees, engage with local training providers and offer internships and other support.
- n. Ensure that tourism jobs in Belize comply with international standards for decent work, including fair levels of pay, conditions, working hours, social security, opportunities for advancement and access to representation.
- o. Address challenges of transport to work, including improved infrastructure and services where necessary.

8. Destination Planning and Environmental Management

To strengthen the planning, development and management of local tourism destinations and the response of the sector to climate change and other environmental challenges

This policy objective concerns the spatial dimension of tourism. It is about spreading prosperity to different parts of Belize. It is also about taking responsibility for minimising the impact of tourism on global and local environments and ensuring sound planning and management in the face of climate change and other challenges, so underpinning the resilience of tourism in Belize. Product

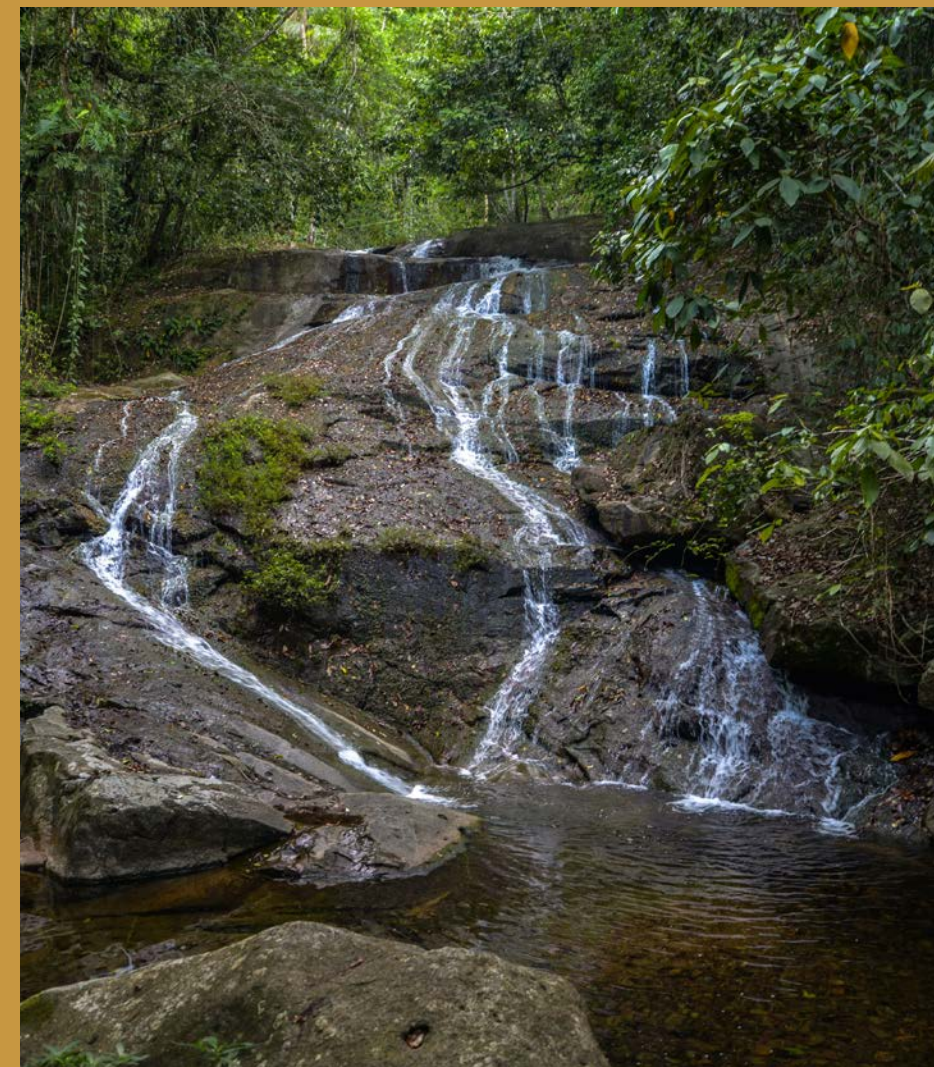
development needs to occur within the context of local destination planning and management. The policies contained in Chapter 5 need to be closely integrated with those presented here, while bearing in mind that most destinations will offer opportunities for a range of types of product.

8.1 Local Destinations and their Management

The NSTMP identified seven destination areas in Belize and stipulated strategic approaches for them involving, variously, containment and consolidation, renovation, new development and promotion of growth. In recent years initiatives in the coordinated planning, development and management of tourism in Belize have focussed on the local destination level. Guided by the vision set in the NSTMP, the approach has been to prepare locally agreed development plans based on stakeholder engagement. This destination level approach is in line with global thinking and good practice on sustainable tourism development and is applied in many countries. The challenge lies in the effective implementation of the local plans and in the ongoing management of the destinations.

The policy is to:

- a. Establish tourism governance structures for local destinations which involve local government/ municipalities, tourism businesses, NGOs and civil society, and provide resources and support for them (See Chapter 9).
- b. Develop 5-year destination-level Tourism Development and Management Plans across Belize.
- c. Ensure that the plans address a full range of development and management issues, including: improving the appearance of the area, environmental management, provision of visitor information and infrastructure, identification and support of new product opportunities, linking to national brand and marketing, and stakeholder networking and communication.
- d. Implement annual programmes of action in the above topic areas, guided by the plan
- e. Monitor and report on the implementation of the destination plans and review and renew them.
- f. Ensure that protected areas, cultural sites and local heritage themes are involved and reflected in local destination plans and their implementation.
- g. Work with local communities to develop opportunities to link to the tourism value chain and minimise negative impacts.
- h. Invest in required infrastructural improvements within local destinations, such as energy, water, and sanitation, including connectivity requirements such as Broadband and transport links (see also Chapter 4).
- i. Produce destination-level disaster preparedness plans, as identified in the NSTMP.
- j. Strengthen cooperation and tangible linkages between destinations.



8.2 Physical Planning and Development Control

Having physical plans in place linked to processes that control development is an important requirement for the delivery of sustainable tourism. This applies not only to developments within the tourism sector itself but crucially also to development projects in other sectors that could impact on tourism, notably by damaging the vital cultural and natural assets on which it depends.

The policy is to:

- a. Use the planning process positively to guide and support good quality tourism development and operations, based on sound design and sustainability principles.
- b. Provide and disseminate practical design and development guidelines for different types of tourism development and different kinds of inland and coastal location.
- c. Have up-to-date land use plans in place in tourism destinations that identify suitable and available zones and sites for accommodation and attractions development, public recreational space and transportation hubs.
- d. Reflect and integrate the Destination Physical Plan element of the NSTMP in local land use plans, including its guidance on location, density and design of different types of tourism development as well as its spatial plans.
- e. Ensure that the treatment of tourism in local land use plans reflects the Integrated Coastal Zone Management Plan, where relevant.
- f. Integrate the NTSMP Land Use Framework into development review processes and reflect its approach in relevant physical planning instruments.
- g. Prepare more detailed planning and land use guidance, informed by further studies, where necessary in certain sensitive locations.
- h. Strengthen Environmental Impact Assessment (EIA) procedures, including consideration of schedules for the level of EIA that must

be applied to different types of tourism development or location, and ensure that EIAs are independent, objective, thorough and sufficiently timely that they can influence planning decisions.

- i. Address positive and negative impacts of tourism in EIAs and other assessments and include consideration of social, cultural and economic as well as environmental impacts.
- j. Ensure that conditions imposed on development, via the EIA or other processes, are assiduously applied and followed up.
- k. Maintain active representation from the tourism sector on the National Environment Appraisal Committee or equivalent decision-making structures.



8.3 Environmental Management and Climate Change

Climate change presents a major challenge for Belize. The country has made a commitment within its Nationally Determined Contribution (NDC) under the UN Framework Convention on Climate Change to “strategically transition to low carbon development while strengthening its resilience to the effects of climate change”. Climate change is therefore a mainstream issue for tourism policy, reflecting the National Climate Change Policy and Plan, and rectifying the fact that scant attention was paid to it in the 2005 National Tourism Policy or the NSTMP. The impact of climate change on tourism arises from changing temperature and weather patterns, rising sea level, storm surges and other effects. This causes coastal erosion, beach loss, flooding, coral bleaching, destruction of habitats, water shortages, damage to property and other impacts on visitors and businesses.

The tourism sector’s response to climate change should be seen as just one aspect of an overall approach to environmental responsibility with respect to energy, waste and the use of precious resources such as land and water. These are important issues for Belize in their own right. For example, the DoE has identified pollution as an issue of primary concern in the tourism sector and solid waste from various sources is a blight in many destinations.

The policy is to:

- a. Strengthen data gathering and awareness raising on the progressive impacts of climate change on key tourism destinations and mapping the most vulnerable areas.
- b. Pursue climate change mitigation measures including improving energy efficiency and the use of renewables in the tourism sector and promoting more carbon efficient transport options and travel patterns.
- c. Establish a ‘protect, prevent, mitigate or adapt’ strategy climate change vulnerable destinations.
- d. Ensure that climate change risk is factored into development planning and control, including site selection, coastal setbacks and building design, together with enforcement of regulations.
- e. Put in place effective shoreline and coastal protection and management regimes with respect to erosion, coral conservation and resilience, management of sargassum, retention of mangroves and other natural processes, and provide guidance for tourism operators on this.
- f. Diversify the tourism offer towards types of tourism and locations that are less susceptible to climate change.
- g. Install appropriate infrastructure and processes in local destinations for adaptation to climate change, recycling and waste treatment and other aspects of environmental management.
- h. Establish and enforce minimum environmental management standards and guidelines for tourism businesses, and ensure that quality regulations, standards and guidelines do not conflict with them.
- i. Establish and promote sustainability and environmental certification programmes for tourism businesses and local destinations.
- j. Provide training, advice and targeted incentives for the environmental management of tourism businesses, emphasising the economic and reputational benefits for businesses as well as the environmental argument.
- k. Promote examples of good practice in environmental management, through award schemes, publicity and production of case studies
- l. Provide information for visitors on environmentally responsible behaviour and on the specific environmental issues in Belize and the sector’s response to them.
- m. Promote a reduce, reuse, recycle approach amongst tourism businesses and visitors and take steps to tackle specific issues most prevalent in the tourism sector including food waste and use of plastic water bottles.
- n. Combat the use of certain plastics, Styrofoam and harmful chemicals, in the tourism sector.
- o. Encourage, incentivise and where necessary regulate for the use of new, energy-efficient and less polluting technologies in tourism.

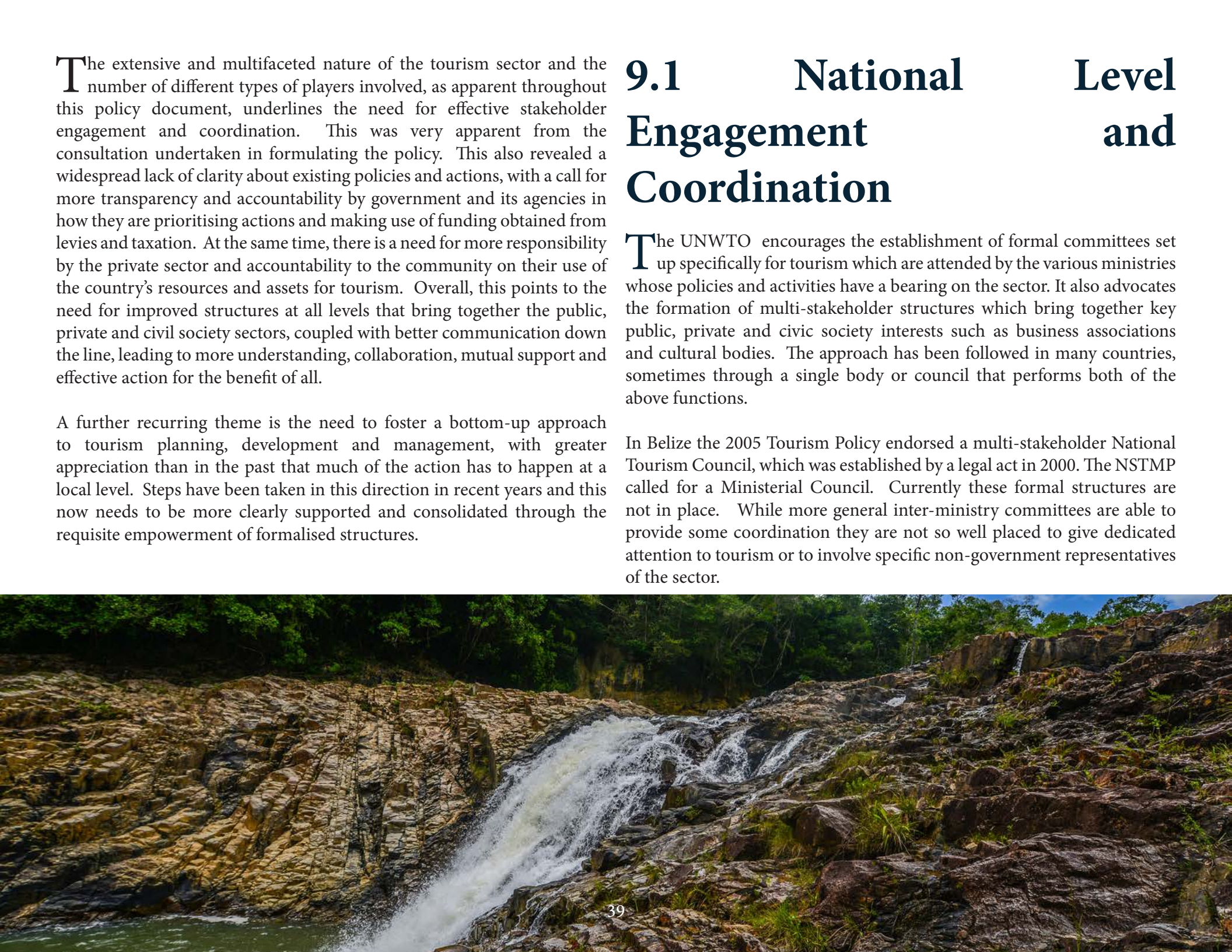


9. Tourism Governance and delivery of the policy

This chapter serves a dual purpose. It sets out policies for good governance of the tourism sector and in so doing describes the structures and functions needed for the delivery of this National Tourism Policy.

To strengthen stakeholder engagement in tourism governance at both a national and a local level, improve coordination, accountability and transparency and ensure effective delivery of the policy.

The approach to governance of the tourism sector needs to meet the sixth policy objective as listed in Chapter 3, namely:



The extensive and multifaceted nature of the tourism sector and the number of different types of players involved, as apparent throughout this policy document, underlines the need for effective stakeholder engagement and coordination. This was very apparent from the consultation undertaken in formulating the policy. This also revealed a widespread lack of clarity about existing policies and actions, with a call for more transparency and accountability by government and its agencies in how they are prioritising actions and making use of funding obtained from levies and taxation. At the same time, there is a need for more responsibility by the private sector and accountability to the community on their use of the country's resources and assets for tourism. Overall, this points to the need for improved structures at all levels that bring together the public, private and civil society sectors, coupled with better communication down the line, leading to more understanding, collaboration, mutual support and effective action for the benefit of all.

A further recurring theme is the need to foster a bottom-up approach to tourism planning, development and management, with greater appreciation than in the past that much of the action has to happen at a local level. Steps have been taken in this direction in recent years and this now needs to be more clearly supported and consolidated through the requisite empowerment of formalised structures.

9.1 National Level and Engagement Coordination

The UNWTO encourages the establishment of formal committees set up specifically for tourism which are attended by the various ministries whose policies and activities have a bearing on the sector. It also advocates the formation of multi-stakeholder structures which bring together key public, private and civic society interests such as business associations and cultural bodies. The approach has been followed in many countries, sometimes through a single body or council that performs both of the above functions.

In Belize the 2005 Tourism Policy endorsed a multi-stakeholder National Tourism Council, which was established by a legal act in 2000. The NSTMP called for a Ministerial Council. Currently these formal structures are not in place. While more general inter-ministry committees are able to provide some coordination they are not so well placed to give dedicated attention to tourism or to involve specific non-government representatives of the sector.

The policy is to:

- a. Re-establish and maintain a National Tourism Council (NTC), with permanent membership of key ministries, selected national agencies and private sector tourism associations, with powers to co-opt and request attendance of others as may be required.
- b. Clarify the role of the NTC, supported by a dedicated Secretariat to be established within the MTCA, in coordinating and streamlining the necessary action to implement this tourism policy between the Ministries and other bodies, avoiding duplication of their activities.
- c. Require members to liaise with their colleagues and own memberships and communicate the work of the Council to them.
- d. Maintain regular reporting on tourism and the work of the NTC to high level committees, including the CEO Caucus, relevant Cabinet Committees and the Economic Development Council.

9.2 The Tourism Ministry and Agencies

The Ministry of Tourism and Civil Aviation and the Belize Tourism Board are the two primary bodies responsible for the delivery of tourism policy in Belize. However, their respective roles in this regard need clarification internally and externally.

The BTB, as with most National Tourism Organisations globally, is responsible for the marketing of Belize as a destination. This role is widely understood but there is less clarity within the sector about its significant additional functions in destination and product development, promoting quality standards and other aspects of management, for which it may not be sufficiently resourced or supported.

The 2005 Tourism Policy and NSTMP advocated the establishment of a Tourism Development Trust, as a separate entity that would spearhead product development in the sector, with responsibility for raising and

dispersing funding and for taking development sites and projects through from planning to fruition, in coordination with various players and investors. It is widely considered that such a body is needed in Belize and should now be put in place.

The policy is to:

- a. Differentiate and clarify the roles of MTCA and BTB, with the former focussing on policy and the latter on execution, as set out in Table 9.1 below.
- b. Establish a Tourism Development Trust (TDT) with roles as set out in the table, while ensuring that it does not duplicate the functions of BTB, Beltraide and other bodies and that its resources are directed at outputs not administration.
- c. Sharpen the focus and perception of BTB on its identified functions, with the provision of sufficient capacity and resources to undertake them.
- d. Ensure that the MTCA and BTB meet the requirements of accountability and transparency and improve the levels of reporting and communication of plans, actions and use of budgets.
- e. Recognise and support the roles of a large number of other Ministries, Government Agencies and NGOs with respect to the delivery of the tourism policy, especially those responsible for trade development, investment promotion, culture, planning, protected areas, transport, education and training, as identified and indicated in the NSTMP and in Table 9.2 below.



MTCA	Belize Tourism Board	Tourism Development Trust
<ul style="list-style-type: none">• Formulate tourism policy• Influence and implement other national and sector policies• Represent tourism within government• Secure budgets for tourism• Coordinate, monitor and review delivery of tourism policy and Master Plan• Establish and oversee legislation relating to tourism• Agree programme of BTB and TDT• Monitor and review performance of BTB and TDT• Liaise and establish joint projects with other ministries and agencies• Liaise with private sector on policy and legal issues• Establish framework for tourism planning and delivery at a local level, with responsibility for mandating and supporting LTCs• Serve as Secretariat to the National Tourism Council• Provide technical support to the National Tourism Council for the Monitoring and Evaluation of the tourism sector, including its impacts on national development.	<ul style="list-style-type: none">• Collect, analyse and disseminate tourism data and intelligence• Liaise with private sector on needs, performance and opportunities• Deliver agreed elements of tourism policy and Master Plan• Execute tourism marketing and visitor information for Belize• Take forward product development concepts• Brief TDT on product development execution• Monitor and enforce tourism quality/safety standards• Coordinate with Tourist Police Unit• Promote tourism training and capacity building• Assist LTCs in preparation and delivery of local destination plans	<ul style="list-style-type: none">• Establish and execute fund raising schemes for tourism development• Disburse tourism development funds based on agreed priorities and criteria• Undertake tourism development/ feasibility studies• Prepare tourism plans for selected areas/zones• Support the creating of infrastructure for tourism development• Assemble land and permissions for development-ready sites• Liaise with Beltraide on investment promotion• Instigate public-private partnerships and other arrangements• Make management agreements



9.3 Private Sector Associations

Private sector associations have a crucial role to play in the successful development, communication and delivery of the tourism policy. Their contribution includes understanding the needs of individual tourism businesses, representing their interests, providing information, advice and support to them and communicating the policies and related actions. The Belize Tourism Industry Association has a cross-sector position, while the Belize Hotel Association and a number of other bodies relate to different sub-sectors or types of tourism.

The policy is to:

- a. Provide capacity building and other assistance to the associations, including in promoting membership and strengthening their communication activities and other services
- b. Encourage the different associations to coordinate their activities and avoid duplication
- c. Ensure engagement with the National Tourism Council and other structures
- d. Work with the associations on delivering specific elements of the policy that require take up by individual tourism businesses
- e. Encourage the associations to take a more active role in tourism planning, destination development and product enhancement in addition to marketing and advocacy, including engagement in Local Tourism Committees and in preparing and executing local plans.

9.4 Local Destination Governance Structures and Vertical Coordination

The importance of local destinations and the approach that is advocated there was presented in Chapter 8. This centres around the preparation of local destination development and management plans. It requires the positive engagement of tourism businesses and other stakeholders in their preparation and delivery. A number of destinations have formed Local Tourism Committees for this purpose although other structures also exist. These have sometimes proved fragile and hard to sustain, with difficulty in recruiting and retaining stakeholder engagement, lack of resources and problems with implementing the plans and carrying out the necessary management functions.

The policy is to:

- a. Identify and put in place an optimal structure, standard constitution and terms of reference for Local Tourism Committees and empower those that comply with a legal mandate for implementing tourism development and management plans.
- b. Ensure that the LTCs have sufficient authority and support to carry out their mandate.
- c. Encourage local authorities/municipalities to play an anchoring role in the LTCs.
- d. Place a proportion of tourism budgets at the disposal of LTCs, subject to the content of the local plans and sound proposals for use of the resources.
- e. Establish a formalised mechanism for the engagement of national bodies in the LTCs and the representation of LTCs on national structures.
- f. Provide capacity building for the LTCs, access to advice and support and an information network between them.
- g. Engage with the respective local governance structures in the planning, development and management of tourism in local communities.



10. Monitoring, Evaluation and Review

This tourism policy has been written for the ten years from 2017 to 2028. It is intended that it should be a dynamic policy that is kept alive and in regular use during this period. This will require an ongoing process of monitoring progress in its application, evaluation of outcomes, reconsideration of relevance and amendment where required. To maintain stakeholder engagement the above process will also need to be the subject of regular and transparent reporting.

Monitoring and evaluation (M&E) should be a key role of the National Tourism Council, with the Ministry of Tourism providing technical support. It will require the availability of good data. This is also necessary for effective planning as well as assessment of actions and is relevant to the implementation of all parts of this tourism policy.



There are five main types of relevant performance indicators related to the policy aims and objectives:

- The volume and value of tourism visits, including length of stay and spending per head, and its spatial and temporal distribution.
- Business performance (including occupancy levels, attendance figures and spending and other indicators of profitability and viability), levels of investment, levels of employment in tourism.
- Visitor profiles and activities, response and levels of satisfaction.
- Indicators of social and environmental conditions, including physical damage, habitat loss, pollution and crime levels.
- Delivery and response to specific policies, including actions taken and stakeholder engagement, such as provision and take up of training.

The policy is to:

- a. Assess regularly the quality and reliability of tourism data and other evidence.
- b. Strengthen coordination and cooperation among agencies involved in tourism data collection, clarifying roles and establishing mechanisms

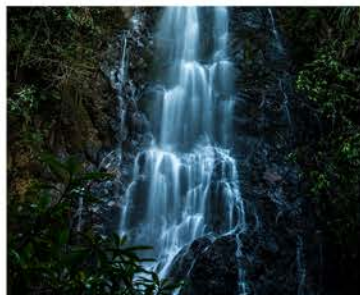
for integration.

- c. Improve data collection and analysis processes where necessary, including survey coverage and sample sizes, ensuring the use of latest technology including GIS, and providing more resources where required.
- d. Encourage the sharing of data and evidence between ministries and agencies and between the public, private and civil society sectors.
- e. Strengthen the dissemination of tourism data and improve the timing of its availability.
- f. Maintain ongoing work on preparing a Tourism Satellite Account for Belize and relate it to the above.
- g. Establish a M&E framework for the Policy and NSTMP and a system for M&E to be carried out during the life of these documents.
- h. Undertake a regular review of the implementation of the different elements of the tourism policy and actions taken.
- i. Provide regular reports on the above for discussion at the proposed National Tourism Council and elsewhere, together with a comprehensive and publicised annual report.
- j. Undertake a comprehensive review and prepare a new policy in 2028.





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