UPDATING THE NATIONAL TOURISM POLICY OF BELIZE

ASSESSMENT REPORT

Final

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APPROVED

Updating the National Tourism Policy of Belize: Assessment Report

EXECUTIVE SUMMARY

The last National Tourism Policy for Belize was prepared in 2005. A revised policy is needed that reflects the current context and trends affecting tourism in Belize. The purpose is to clarify the priorities and direction for the sector for the next five years, providing a high level orientation for the ongoing implementation of the National Sustainable Tourism Master Plan.

This Assessment Report has been prepared following an initial round of evidence gathering and consultation. It will form the basis for obtaining further input from tourism stakeholders leading to the preparation of the draft revised policy document.

The existing policy context

The UN has designated 2017 as the International Year of Sustainable Tourism for Development, highlighting the need for a tourism policy that delivers sustainable and inclusive growth, protects the environment, celebrates cultural diversity and enhances peace and mutual understanding. These themes are well reflected in the regional strategic plans for tourism in the Caribbean and in Central America, both of which are based on principles of sustainable tourism while emphasising the need to deliver a higher quality, more diverse tourism offer with more investment in human capital, connectivity and coordinated marketing.

Within Belize, the headline development policies set out in *Horizon 2030* and the *Growth and Sustainable Development Strategy* already provide clear recognition of tourism and its key role in delivering economic benefit from Belize's special combination of cultural and natural heritage assets. The existing Tourism Policy and Master Plan contain much content and detail that is relevant today and a radical departure is not envisaged, but there is a need for more widespread awareness of the policy, a stronger sense of direction and a clearer focus on priorities and implementation.

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Tourism trends and performance in Belize

Belize has seen significant growth in tourism arrivals over the last five years, exceeding global and regional averages and outstripping forecasts and targets set in the current policies and plans. However, targeted increases in average length of stay have not been met and spending levels per day have fluctuated and not seen consistent growth. Average hotel occupancy has remained relatively low with little change in seasonal patterns but there has been a significant increase in visits to archaeological sites. Levels of satisfaction with the country's natural and cultural assets and the quality of tours are high, but Belize performs less well in terms of perceived value for money and some aspects of visitor services.

These figures point to an ongoing challenge to achieve a high quality, high value and consistent tourism offer that delivers enhanced economic benefits from the visitors who come. Nevertheless, future forecasts suggest that tourism should be able to build on its already significant contribution to GDP and employment, as the country's most important economic sector.

Key policy issues

The main part of the report identifies a series of issues to be addressed in the revised policy based on the initial assessment and first round of consultation. They are covered under 16 headings. The summary below pulls out the main points.

1 The shape and balance of tourism in Belize

- Avoiding over-dependency on tourism and increasing inter-sectoral linkages
- Prioritising value over volume, increasing spend per head
- Spreading growth in tourism spending to all parts of Belize
- Embracing and clarifying principles of sustainable and responsible tourism
- Supporting natural and cultural assets and conservation through tourism
- Taking a more integrated approach to well-managed cruise and overnight tourism
- Capitalising on being an inland/marine and a Caribbean/Central American destination.

2 Target markets, branding and promotion

- Maintaining a spread of well-researched target markets
- Increasing the attention paid to regional and domestic markets
- Further strengthening the articulation and dissemination of the marine/nature/culture brand
- Delivering experiences to match the brand promise
- Coordinating promotion of local destinations in a coherent brand framework
- Strengthening visibility and provision of signage and information at a local level
- Refining skills in digital techniques and niche marketing.

3 The product offer

- Guiding product development with enhanced market knowledge and feedback
- Keeping abreast of international trends in product development
- Monitoring and reviewing the prioritisation of general product types and more specific niches
- Seeking more internationally branded hotels and high quality accommodation offers
- Gaining more net benefit from the sharing economy while addressing associated issues.

4 Quality and standards

- Recognising low or inconsistent quality of facilities and services as a major issue in Belize
- Finding the right balance between standard setting and market-based influences on quality
- Extending the coverage of standards into new activities, as appropriate
- Integrating the application of quality standards with other regulatory requirements
- Ensuring compliance with standards and effective enforcement
- Engaging tourism stakeholders in the formulation, ownership and monitoring of standards
- Harnessing consumer feedback and customer generated ratings to drive up quality
- Focussing investment and training on securing improvements in quality.

5 Cultural tourism

- Achieving the closest possible alignment between tourism and cultural policies and initiatives
- Strengthening resources and capacity for management of cultural sites to avoid degradation
- Carefully improving access to cultural sites and extending the number open to visitors
- Improving the quality of facilities and trading at cultural sites and the generation of income
- Ensuring that a proportion of income raised is used to support management and conservation
- Promoting access to quality arts, crafts, performances, events and other living cultural heritage.

6 Natural heritage and protected areas

- Seeking ways to generate further support for conservation from the tourism sector
- Pursing admission charges, concessions, community-based engagement etc. as appropriate
- Engaging tourists more explicitly in supporting conservation
- Clarifying and pursing different options for recreational and adventure activities in nature
- Applying monitoring and management regimes more actively to avoid unacceptable change
- Adopting codes of good practice for ecotourism in natural areas including wildlife encounters.

7 Cruise tourism

- Reviewing the cruise tourism policy based on sustainable growth and careful management
- Identifying and adhering to limits on overall daily arrivals and capacity limits at specific sites
- Improving scheduling and management of cruise arrivals and movements
- Setting requirements for sustainability of cruise ship operations on and off-shore
- Maintaining constructive dialogue with cruise companies
- Ensuring a high quality experience for all cruise passengers
- Adhering to a clear policy on any future expansion of cruise tourism, including ports and arrivals

8 Social issues, safety and security

- Reflecting principles of social inclusiveness and responsibility
- Addressing levels of crime and inappropriate behaviour sometimes caused by tourism
- Providing equal opportunities for everyone to benefit from tourism without discrimination
- Strengthening perceived and actual levels of visitor safety and security
- Building the capacity of the Tourism Police in enforcement and communication
- Including visitor safety and security issues in other policies and crisis management plans

9 Climate change and environmental management

- Recognising climate change as a fundamental challenge for tourism in Belize
- Reflecting commitments to climate change mitigation and adaptation in tourism policy
- Gathering and disseminating evidence on progressive climate change impacts on destinations
- Taking necessary planning, development, product diversification and management actions
- Raising levels of environmental management in destinations
- Strengthening environmental management within individual tourism businesses.

10 Physical planning and development control

- Preventing development that would damage the assets upon which tourism depends
- Integrating the physical planning guidance from the Sustainable Tourism Master Plan
- Strengthening Environmental Assessment of development projects and adherence to results
- Ensuring that the tourism sector is actively represented in planning and appraisal processes
- Using planning processes positively to guide good tourism development and design.

11 Investment and business support

- Encouraging inclusive tourism investment that involves the local population
- Clarifying and simplifying regulations on tourism investment and facilitating the processes
- Encouraging more public-private partnerships in tourism
- Addressing the needs of SMEs in the tourism sector, with targeted advice and support
- Providing incentives to stimulate specific types of tourism investment and improvement
- Reviewing the regulatory and taxation burden on tourism businesses and any needed reform
- Pursuing a dedicated Tourism Development Trust and associated funding.

12 Human resources and capacity building

- Addressing shortages in the availability of skilled labour in catering and hospitality functions
- Undertaking a comprehensive assessment of training needs across the sector
- Strengthening and coordinating the delivery of tourism training across potential suppliers
- Raising awareness and interest in tourism as a career amongst young people
- Assessing and addressing the quality jobs in the sector, including pay and conditions.

13 Local destination areas and their management

- Preparing destination level plans locally, with an increased focus on implementation
- Maintaining buy-in by local stakeholders through effective engagement structures

- Providing sufficient resources for project implementation at a local level
- Addressing a range of local infrastructure, management and product development issues
- Strengthening community benefit from tourism value chains and cross-sector linkages.

14 Tourism transport and connectivity

- Recognising weak external and internal connectivity as a key challenge for Belize tourism
- Strengthening coordination between tourism and transport policies and related bodies
- Strengthening dialogue with carriers and removing barriers to enhanced airlift to Belize
- Improving standards and capacity at Belize's airports
- Making more of water-based transport as a component of connectivity
- Improving public bus services and other components of land based transport
- Facilitating ease of movement across Belize's land borders.

15 Tourism data and evidence gathering

- Providing better data/evidence to inform planning, development, management and promotion
- Clarifying market and visitor volumes, profiles, actions, movements, reactions and interests
- Improving the monitoring of tourism impacts
- Strengthening collaboration in the collection, analysis and sharing of relevant data
- Ensuring that tourism policies and initiatives are regularly monitored and evaluated.

16 Governance and delivery structures

- Reviewing and strengthening inter-Ministerial and wider stakeholder coordination structures
- Clarifying and identifying the purpose and function of the MTCA in tourism
- Reviewing the role of BTB and its balance of marketing and product development activity
- Agreeing on the need and role of a future Tourism Development Trust and setting it up
- Establishing effective central structures to coordinate and support local destination activity
- Strengthening engagement in regional tourism structures and benefits obtained from them.

Conclusions and recommendations

A short concluding section in the report reaffirms the importance of tourism in Belize and the need to support the sector with clear policies that are widely understood, agreed and applied. The importance of Belize's cultural and natural assets to the destination brand has been further underlined in the consultation. This has a bearing on the ongoing acceptance of sustainable and responsible tourism principles as a basis for future policy. However, weaknesses in the application of some of these principles are apparent and need to be addressed. The key issues summarised above provide a potential framework and subject matter for the revised tourism policy.

The National Tourism Policy should not just be for the Government of Belize but should be embraced by all tourism stakeholders who should get behind its delivery.

Based on this Assessment Report, further stakeholder consultation will be undertaken. This will inform the drafting of the revised National Tourism Policy, which will be subject to additional validation before it is completed.

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Acronyms

APAMO	Association of Protected Area Management Organizations
BTB	Belize Tourism Board
CEO	Chief Executive Officer
CHTA	Caribbean Hotel and Tourism Association
CSF	Critical success factor
CTO	Caribbean Tourism Organization
EDC	Economic Development Council
EIA	Environmental Impact Assessment
ILO	International Labour Organization
ITC	International Trade Centre
LTC	Local Tourism Committee
MEYSC	Ministry of Education, Youth, Sports and Culture
MTCA	Ministry of Tourism and Civil Aviation
NC	Necessary condition
NDC	Nationally Determined Contribution
NICH	National Institute of Culture and History
NSTMP	National Sustainable Tourism Master Plan
NTP	National Tourism Policy
PACT	Protected Areas Conservation Trust
SDG	Sustainable Development Goal
SITCA	Secretariat for the Integration of Tourism in Central America
SME	Small, medium and micro sized enterprise
UNCTAD	United Nations Conference on Trade and Development
UNEP	United Nations Environment Programme
UNWTO	World Tourism Organization
VEMS	Visitor Expenditure Motivation and Satisfaction
WTO	World Trade Organization
WTTC	World Travel and Tourism Council

Introduction

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A revised National Tourism Policy for Belize

The Ministry of Tourism and Civil Aviation (MTCA) of Belize is reviewing and revising the National Tourism Policy of Belize. The work is supported by the Inter-American Development Bank through the Sustainable Tourism Program II.

The current National Tourism Policy of Belize, published in 2005, is out of date. A revised policy for tourism is required that reflects the current national and international context and the key trends, challenges and opportunities in the tourism sector.

The National Tourism Policy will clarify the direction and priorities for the tourism sector over the next five years. It will not replace the National Sustainable Tourism Master Plan 2012 – 2030, which will continue to be the instrument that guides the planning and development of tourism at a national and local level.

The intention is to produce a policy document that is clear and accessible. The purpose is to enable all government ministries, agencies, tourism businesses and other relevant bodies to understand the needs and opportunities of the sector and the priorities for Belize, so that they can work more effectively together for its sustainable development.

When the National Tourism Policy has been endorsed, a further stage of work will be undertaken to revise, as necessary, the legislative framework required for its delivery.

The purpose of this assessment report

This assessment report outlines the evidence upon which the revised policy will be developed. It presents a summary of the relevant international, regional and national policy frameworks, including the current tourism policies, an analysis of tourism performance in Belize, and an assessment of the main issues that should be reflected in the revised tourism policy. The latter assessment has been based on an initial round of direct consultation with relevant ministries, agencies and industry bodies[1]. The report draws conclusions from the evidence and presents some initial recommendations for the development of the revised tourism policy.

The report will provide the basis for a further round of stakeholder consultation, primarily in the form of a series of workshops to be held throughout Belize. Informed by them, the revised policy will be drafted and presented to a further national-level validation workshop, leading to the completion of a final agreed policy document.

[1] A list of stakeholders consulted in the first round is contained in Annex 1.

1 The existing policy context

This section looks first at the global policy context for tourism as established by the United Nations and reflected in particular by its specialised agency for tourism the World Tourism Organization (UNWTO). It then considers the current and evolving regional tourism policies, both for the Caribbean and for Central America. Next it looks at the overarching development policies in Belize and those of other sectors and spheres of government most relevant to tourism. Finally, it considers the current National Tourism Policy (2005) and the National Sustainable Tourism Master Plan.

1.1 Global policy for sustainable development and tourism

Since 2012 the role of tourism as a tool for sustainable development has been underlined by the UN, through a number of resolutions. In particular, the *2030 Agenda for Sustainable Development*[2], which established the 17 Sustainable Development Goals (SDGs), includes a determination to promote sustainable tourism, and makes specific reference to the role of tourism in creating jobs, promoting local culture and products, and providing a sustainable use of marine resources.

The declaration of 2017 as the International Year of Sustainable Tourism for Development (UN Resolution 70/193) has provided an opportunity to focus further on tourism needs and opportunities. The key themes of the International Year, identified by UNWTO, amount to the most recent articulation of a global policy agenda for tourism, reflecting the SDGs. They are summarised below.

Policy themes of the UN International Year of Sustainable Tourism for Development 2017

1 Sustainable economic growth
Creating the right environment for resilient and sustainable economic growth in all parts of the world, supported by investment in infrastructure and facilities, excellent connectivity and innovative business models that deliver quality products in line with market trends.

2 Social inclusiveness, employment and poverty reduction
Ensuring an equitable distribution of income and benefits from tourism, creating decent jobs, reducing poverty, providing opportunities for women and young people, respecting and supporting the interests of local and indigenous communities, and encouraging inclusive access to tourism experiences for all.

3 Resource efficiency, environmental protection and climate change
Helping the tourism sector transition to more sustainable consumption and production patterns, creating opportunities in the green economy, mitigating and adapting to climate change, and supporting and gaining from the conservation and sustainable use of biodiversity and natural areas.

4 Cultural values, diversity and heritage
Developing supportive partnerships between tourism and cultural interests, conserving tangible and intangible heritage and cultural values and pursuing creative opportunities to bring social, education and economic benefits to visitors and host communities through cultural experiences and exchanges.

5 Mutual understanding, peace and security
Recognising the transformative role of tourism as an agent for change, using awareness and interaction resulting from tourism to strengthen peace, understanding and reconciliation, while linking tourism development opportunities to the improvement of security in destinations and helping post-conflict areas to rebuild and expand their tourism economy.

A number of more specific UN resolutions and initiatives relating to sustainable development and resource conservation also underline the role of tourism and are of particular relevance to Belize:

[2] Resolution 70/1 *Transforming our world: the 2030 Agenda for Sustainable Development*, 25th September 2015.

- The SIDS Accelerated Modalities of Action (SAMOA) Pathway, adopted by the International Conference on Small Island Developing States (Resolution 69/15 of 14th November 2014). Tourism in SIDS has been the subject of study by UNWTO[3] feeding into the SAMOA pathway.
- The UNESCO World Heritage and Sustainable Tourism Programme, which involves an integrated approach to tourism planning and heritage management, leading to the protection and valuing of cultural and natural assets and appropriate tourism development.
- The work of the Secretariat of the Convention on Biological Diversity (linked to UNEP) in promoting good practice towards sustainable tourism development in natural areas.
- The Sustainable Tourism Programme within the UN's ten year framework of programmes on sustainable consumption and production (10YFP), which supports action to improve sustainability in all stages of the tourism lifecycle and provides a vehicle for the sector to address various global commitments such as the Paris Agreement on Climate Change.
- Actions in the field of trade, investment and employment, where a number of UN and other agencies, including UNCTAD, International Trade Centre (ITC), ILO and WTO, have been working individually and jointly with UNWTO to integrate tourism into their development activity.

1.2 Regional tourism policy

Belize's special location and cultural heritage means that it is equally a Caribbean and a Central American country. In order to reap the strategic benefits that this can bring, it needs to engage with both regions in influencing and aligning with their tourism policies.

In the Caribbean, the **Strategic Plan for the Caribbean Community 2015-19** focusses on achieving economic growth and improved quality of life while building stronger economic, social and environmental resilience. It recognises tourism as a key driver of economic growth in the region.

The **Strategic Plan for Tourism Services in CARIFORUM States (2017-2020)** has been prepared as a consequence of the above recognition. It identifies many challenges for the region which is seen as lagging behind other areas in meeting the needs of a more discerning market, requiring a new and more sustainable approach. Based on an identification of success factors in tourism, it calls on the region to:

- Develop sustainable and responsible tourism
- Foster innovation and creativity
- Build human capital
- Add culture and local content
- Use information and communication technologies
- Involve locals
- Move up the value chain
- Ensure effective communication and coordination.

Action plans are set out in various policy areas, with many of the actions relevant to Belize, including:

- **Marketing**. Strengthening resources and coordination of marketing of the Caribbean as a region as well as individual destinations; diversifying target markets (including intra-regional markets and

[3] *Challenges and Opportunities for Tourism Development in Small Island Developing States,* UNWTO, 2012

attracting niche markets); using research to inform marketing; setting targets of 6% growth in visitors and 10% in spending per annum to 2020.

- **Education, training and HRD**. Meeting industry needs; filling talent gaps; improving perceptions and delivery of tourism as a career opportunity.
- **Cross-sectoral linkages.** Widening the definition of tourism; building awareness and capacity in different sectors; strengthening local supply chains; developing linkages with creative industries.
- **Investment, incentives and access to finance.** Removing barriers to investment; strengthening investment promotion; providing transparent incentives to attract investment; improving capacity of SMEs to source finance; providing innovative and flexible financial services.
- **Transport to and within the region.** Strengthening the regional transport policy framework and alliances; Meeting investment requirements in the cruise sector while seeking increased returns and strengthening negotiation skills; improving quality and service provision especially for high-end markets.
- **Product development and quality standards.** Providing more innovative and authentic experiences in line with new market trends; developing product clusters; reviewing standards and their enforcement; focussing on delivering quality tourism; promoting the principles of sustainable tourism development and operation.
- **External environment, technology and data.** Establishing a balance between border security and tourism openness; strengthening the use of technology to improve competitiveness; improving data gathering, sharing, application and capacity.

A recent paper on **Growth and Development through Tourism**, presented by CARICOM to heads of government of the Caribbean Community (February 2017), has pointed to the global success and growth of tourism while suggesting that the Caribbean has failed to realise its potential. Factors affecting its performance include escalating global competition, high cost of holidays, low profit margins, insufficient marketing and a need to address shifting consumer demands towards unique experiences. It calls for more public-private coordination and proposes structures for this. CARICOM, with the CTO and CHTA, have identified six priority areas for immediate and long term focus, including:

- Ease of travel to and within the Caribbean
- Human capital development
- Strengthening the creative industries and economic linkages
- Competitive pricing and addressing the high cost of the vacation experience
- Strengthening PR and the marketing of the Caribbean brand
- Managing and financing a sustained regional tourism initiative.

In Central America, the main tourism policy document is the **Strategic Plan for the Development of Sustainable Tourism in Central America, 2014 – 2018** produced by the Secretariat for the Integration of Tourism in Central America (SITCA). The strategy is based on principles of sustainability, excellence, innovation, responsibility, integration, authenticity, diversity and ethics. It is framed around three strategic areas:

- **Marketing and promotion**. Implementing a regional marketing strategy and promoting intra-regional visits.
- **Political support.** Recognising and assisting tourism as a priority sector, with a consensus between the Central American countries on its direction
- **Quality and sustainability**. Promoting the use of a common quality and sustainability system amongst tourism businesses in the region.

Targets are set for the growth in visitor numbers, average length of stay, income generated, percentage of GDP provided by tourism, and tourism employment.

There is a framework of objectives, indicators and actions covering various policy areas including: market and product segmentation, promotion of multi-destination packages, increasing web traffic, national strategies and support for tourism, engagement of businesses in quality and sustainability programmes, institutional strengthening for regional structures, and monitoring and evaluation.

The above strategy provides the basis for annual action plans that are coordinated by SITCA. The level of progress made with its implementation is not clear but a mid-term evaluation will be undertaken shortly. SITCA believes that the strategy is broadly on track but recognises that take-up has been inconsistent in the member countries, including Belize.

1.3 The national policy context in Belize

Horizon 2030 is the overarching policy for development in Belize, to which all sector policies should relate. Its vision is that by 2030 "*Belize is a country of peace and tranquillity, where citizens live in harmony with the natural environment and enjoy a high quality of life. Belizeans are an energetic, resourceful and independent people looking after their own development in a sustainable way.*"

The policy calls for broad planning and an inter-sectoral approach, with policies anchored in the community. It has four pillars. These are set out below, with implications for tourism policy identified:

1 Democratic governance for effective public administration and sustainable development.
Emphasis is placed on the streamlining of processes, monitoring, local accountability and the enforcement of laws.

2 Education for development – education for life.
This includes continuing education, with implications for training and capacity building. Reference is made to the arts and cultural diversity. There are implications for the domestic market and opportunities for Belizeans to enjoy and appreciate their own country.

3 Economic resilience – generating resources for long term development.
Tourism is specifically identified, with one of the goals being to "Ensure a sustainable and profitable tourism sector", which is included amongst a small number of other goals for agriculture, SMEs and workforce, and infrastructure. Strategies to achieve the goals emphasise the role of small businesses and community-driven initiatives, within a coherent and equitable macro-economic framework. Specific reference is made to building sustainable and responsible tourism.

4 The bricks and the mortar – healthy environment and healthy people.
The policy recognises that "caring for the natural environment is the source and basis of economic and social progress". Tourism and agriculture are identified as the main economic drivers, which are natural resource based. The man concern is putting in place effective laws and regulations, information and communication systems to protect the environment while promoting sustainable social and economic development. Strategies refer to: incorporating sustainability into development planning, including planning for climate change, disaster management, environmental protection laws, protected area systems, and the promotion of green energy and energy efficiency.

The **Growth and Sustainable Development Strategy 2016-19** builds on Horizon 2030 and describes itself as the nation's primary planning document for the medium term. The strategy sets out four

Critical Success Factors (CSF) under which a series of Necessary Conditions (NC) and associated Actions are identified. Many of these refer directly to tourism or have implications for the sector.

CSF1: Optimal national income and investment.

Necessary Conditions relate to issues such as strengthening competitiveness, attracting investment, providing adequate infrastructure (transport, tele-communications, waste disposal etc.), skills training and capacity building. One of the NCs is "Effective industrial policy, based on Belize's strengths" with a need for "Strategically Prioritized Sectors for Development", under which ten separate actions are identified for tourism. These include:

- Allocating resources for MTCA and for marketing,
- Pursuing emerging source markets
- Diversifying the product and engaging in destination level planning and development
- Developing a cultural tourism programme
- Putting in place basic infrastructure (including improving roads, ports, airports, sanitation)
- Reviewing options for raising finance for tourism
- Reviewing options for delivery of capacity building and skills training
- Strengthening efforts to raise service standards, including quality assurance programme
- Strengthening links to other sectors, including agriculture, and pursuing rural development
- Fostering inclusive growth, including market friendly approaches for communities to benefit more from tourism, including the cruise market.

CSF2: Enhance social cohesion and resilience

This includes reference to regional development programmes, engagement of all sectors of society, and provision of decent wages and work conditions.

CSF3: Sustained or improved health of natural, environmental, historical and cultural assets

The intrinsic value of such assets is recognised but so is their "extraordinary economic and social importance". The dependence of tourism on them is specifically recognised. For this reason, the various Necessary Conditions and associated actions are particularly relevant to tourism. They cover ecosystems management, water resource management, disaster risk management and climate change resilience, management of historic and cultural sites, marine and aquatic resources, urban and rural planning, and waste management and pollution control.

CSF4: Enhance governance and citizen security

This includes reference to governance systems, addressing social issues, effective policing, better administration of justice and maintaining the integrity of national borders. A specific reference is made to tourism in identifying the need for visitors to feel safe and secure, addressing crime levels.

Sections of the strategy refer to implementation arrangements, working with appropriate ministries, and resource mobilisation, including new financing options such as expanding public-private partnerships and use of trust funds for specific purposes.

A range of subject and sector specific policies also have a bearing on tourism and need to be reflected in the revised tourism policy. Some of the main ones are identified in the table below, with a brief indication of their implications for tourism. They are also reflected in the assessment of key issues later in this report.

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 resources, providing a framework and participatory approach to planning and decision making on new development proposals including for tourism.

1.4 Tourism policy in Belize

The **Belize Tourism Policy 2005** is the current national tourism policy. It was prepared at a time when there had been a very rapid rise in cruise tourism arrivals. The context and challenges noted in the preamble to the policy refers to this rise and the need for careful management, together with new opportunities in the field of experiential tourism, increasing global competition and the need to improve quality, investment and levels of accommodation.

The policy states that: *Belize's tourism vision is to develop a vibrant and progressive tourism industry through a responsible approach which embraces a strong "eco-ethic" and effective destination management that seeks to improve the quality of life for all Belizeans.* There are 8 guiding principles:

1) All tourism activity shall be designed to improve quality of life of Belizeans
2) Appropriate balance between cruise and stayover tourism, to ensure destination positioning of Belize is not compromised
3) Government to foster a positive environment and meaningful local participation

4) Tourism planning and management to be based on partnerships and collaboration
5) Local communities to play a meaningful role to ensure economic, social and cultural benefit
6) Tourism policies and development programmes to be integrated with national economic, social and cultural policies
7) Development of the tourism sector to be market-driven
8) Application of business practices in the management of the destination.

Growth targets were set for tourism spending to 2015, which are considered in the next section of this report against actual performance. A separate set of sustainable tourism objectives was presented, emphasising quality of life, opportunities for youth, links to agriculture and other sectors, involvement of communities, heritage protection and generating revenue for cultural activity, environmental management, enhanced interpretation, enforcement of land use policies and coastal protection, and the development and enforcement of carrying capacities.

The main body of the document is shaped around four separate policy areas, with priorities identified under each of them. These are summarised below.

Policy on product development:
- Maintain Belize's position as an adventure destination.
- Strengthen competitiveness/growth in stayover market and develop additional niche markets while ensuring adventure destination positioning is not compromised.
- Ensure high quality cruise experience, without compromising position as an ecotourism destination. Designate selected sites for cruise market. Foster cruise lines using smaller ships and promoting to nature/culture market.
- Develop an accommodation development programme to enhance competitiveness of the sector and develop destination strategies for properties unable to meet export ready status.
- Develop a sustainable approach to HR development, working with educational institutions to ensure training is well matched to objectives of tourism development programme.
- Develop an 'export ready' policy for accommodation, travel infrastructure and attractions.
- Modernise tourism investment regime to become competitive with the rest of the Caribbean.

Policy on Strengthening Tourism Destination Linkages:
- Declare tourism a priority sector and work with policymakers from each sector to establish the linkages and develop a framework for action.
- Ensure an integrative and consultative approach to policies related to environment, heritage, culture, land use planning and physical infrastructure.
- Ensure competent and sufficient regulation, including enforcement of carrying capacities, cruise ship docking and other environmental regulations.

Policy on destination marketing and promotion:
- Destination promotion will be financed at a competitive level
- Better business practices behind marketing – forecasts, market research, annual review of effectiveness, use of IT.
- Greater emphasis on speciality niche marketing – building relationship/partnership with speciality tour operators and linking them to suppliers.
- Make marketing more market-driven. Create market intelligence profiling nature, cultural and adventure segments.
- Focus on marketing export-ready products.

Policy on destination management:
- Strengthen the destination management agency (BTB) and its partnership with industry.

- Conduct tourism destination management utilizing business planning principles
- Prepare a Tourism Master Plan that will execute the National Tourism Policy with specific plans and programmes for tourism product development, investment and marketing and area plans including community tourism.
- Establish a performance monitoring programme that provides annual data on the contribution of tourism to the economy, and a reporting system that tracks key indicators.

Some more specific implementation actions are identified under each of the priority areas listed above. The roles of different stakeholders are identified. Emphasis is placed on partnership, to be facilitated by the following bodies which in turn need to be strengthened:

- Belize National Tourism Council – oversight/guidance on implementation of National Tourism Policy and a link between government and the BTB. Provide an annual forum for industry and government to review the state of the tourism sector and plan the next year and into the future.
- Belize Tourism Board – marketing, product development, training and monitoring
- Private sector associations – Hotel Association and Belize Tourism Industry Association – voices for industry.

Recent consultation has revealed that this National Tourism Policy and its recommended actions, although theoretically still current, is not well known and is currently not used at all. Indeed, it may not have had much impact even in the early stages, partly because of the subsequent advent of the National Sustainable Tourism Master Plan which it heralded.

The **National Sustainable Tourism Master Plan 2030** was endorsed in 2012, after a four year development process with local stakeholders. It was a sizeable undertaking and resulted in a multi-faceted document of over 500 pages. The plan only makes passing reference to the Belize Tourism Policy 2005. While not contradicting the Policy, it does not make use of its vision or components.

A diagnostic analysis identified the following key weaknesses:
- Poor level of accessibility on land and by air
- Lack of sufficient and quality tourism services and facilities
- Scarce Belizean made handicrafts
- Inadequate natural and heritage asset management
- Deficient communication and promotion of tourism assets
- Insufficient waste disposal and sewage systems
- Lack of urban planning and land use regulation
- Lack of public awareness programmes
- Need for integration of local communities in the tourism value chain.

The concept behind the Master Plan reflects Belize's strategic location, offering "the best of Central American adventure and Caribbean flare". The 'Vision 2030' is of Belize as *"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."*

Growth targets to 2030 are set for arrivals, nights, spend and length of stay, for both overnight and cruise tourism. These are looked at in the next section of this report.

The strategy behind the Master Plan is expressed in different ways within the document, leading to a lack of clarity and consistency. Principles and key words are found in two sets, relating to:

- How Belize should be perceived: Sustainable, Authentic, Unique and Competitive.
- Goals or objectives for tourism: Sustainability, Optimization, Competitiveness, Leadership.

The Executive Summary sets out five strategies, as follows:

Strategy 1: Product development (Optimization goal).

Offer a diversified product, with sustainability aspects considered early in the process. Six product types are identified (see below).

Strategy 2: Integrated destination development (competitiveness and sustainability goal).

Integrated development of prioritised destinations. Destination planning based on appropriate density models. Value chain development.

Strategy 3: Experiential quality enhancement (competitiveness goal)

The hosting experience – friendliness and professionalism. The visual context – villages and towns, roads, garbage pick-up, land use and buildings guidelines. The comfort of feeling safe – codes, surveillance, safety standards, emergency response.

Strategy 4: Empowerment of stakeholders (leadership and optimization goal)

Stakeholder participation. Maximum generation of local benefits - support for local SMEs; mechanisms to link to poverty alleviation.

Strategy 5: Proactive solution to funding sources (leadership and sustainability goal)

Self-funding tourism development solutions. Positive search for investment partners.

Rather differently, the Strategic Framework section in the body of the Master Plan sets out:

A strategy to enhance sustainability of tourism: destinations strategy

Emphasises the need for quality environment and sustainability. Define product cluster programmes. Focussed and controlled development – with different models, rates of growth and densities for seven geographic areas (see below). Phased implementation programme between the areas.

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

Diversification of products. The six identified product types. Prioritization between them based on importance (competitiveness and attractiveness) and ease of implementation. Different target markets identified.

Strategy to achieve competitiveness of tourism: commercial strategy

Achieving excellence in tourism through quality improvement – setting and achieving standards. Setting a unique brand to implement the right commercial strategy.

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

Create Product Management Units under BTB structure. Create a National Tourism Trust Fund. Create Public-Private Partnerships. Attract FDI. Generate SME growth. Create Tourism Satellite Account (to support strategic decision making). Create national security programmes.

While the above strategies provide a rather generalised and varying framework, the main shape of the Master Plan can be seen from the identification of the seven geographical areas and six product types. Descriptions of them are shown in the boxes below, taken from the Executive Summary.

Master Plan framework: Treatment of seven geographic areas

Western Belize: San Ignacio city will be a demand driver, itself hosting a state-of-the-art welcome center, National Archeological Museum and charming village setting. The surrounding areas will have numerous nature and heritage trail systems and conceptualized adventure activities and facilities, nurtured by demand driven from high profile attractions such as Caracol and ATM cave systems.

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

Northern Islands: In Ambergris Caye, San Pedro will be regarded as a charming and attractive destination including a vibrant town with a walkable and attractive waterfront experience where beaches able to be enjoyed and unobstructed water scenery. Caye Caulker will continue to offer low-key charm along with attractive beaches and a cultural offering. Both destinations will provide a mainly nature-based niche product as well as nautical and sun&beach in second rank.

Central Coast Belize: Will be dominated by a vibrant, urban tourism based in Belize City with a combination of preserved colonial-heritage architecture and modern entertainment facilities. It will host brand-name hotels as well as traditional style boutique hotels, for a growing overnight tourism market and various facilities for cruisers and yachts and sailing clubs. It will be the main hub for conventional cruise arrivals that will benefit from Belize´s City cultural offering as well as souring nature based tourism motivations and links to other destinations.

Northern Belize: In this region we will find easy access to a prosperous Corozal town hosting a mid-high end Leisure & Entertainment center. Additionally, Orange Walk district will be benefiting from rural tourism activities and the integrated development of Mayan Heritage sites.

Southern Belize: This area will become highly attractive to hard adventure travellers and eco- travellers for its unspoiled nature allure, conceptualized adventure travel sports activities and facilities, community tourism attractions. In a second order it will develop cultural tourism heritage and living culture while integrating local rural communities. In another level it will be a sun & beach and nautical tourism destination for those attracted to more secluded area.

Belize Reef: This unique chain of reef islands will be renowned internationally for its world heritage status and will be regarded by visitors as a pristine and well-preserved destination. It will cater mainly to day visitors and will have second order niche markets hosting exclusive sun & beach low density resorts and nautical tourism facilities.

Comparing the seven areas, the Master Plan gives early priority to Western Belize, the South East Coast and Central Belize, and secondary priority to the Northern islands, Northern Belize and Southern Belize.

The broad strategies for specific locations identified in the plan are:

- Constrain development and consolidate – Placencia peninsula, Ambergris Caye, Belize Reef
- Promote tourism growth – San Ignacio, Northern Belize, Southern Belize
- New development – Stann Creek
- Urban renovation – Belize City.

Master Plan framework: Treatment of six product types

Nature-based Tourism organizes Belize's ecotourism and adventure tourism products into a system of themed natural and man-made nature-based concepts structured into integrated recreational ecotourism and adventure sites and centers. In addition, it designs diverse nature-based themed routes and trails, such as the National Nature Tourism Trail System and a National Caving Trail System, catering to the interests and needs of different niche segments. Unique natural tourism assets, such as the barrier reef, Blue Hole and ATM will be commercialized under well managed sustainable development guidelines

Cultural Tourism focuses on the development of cultural heritage and living culture sub-products. Its flagship creation is the development of a National Museum of Anthropology that will be strategically located in San Ignacio town. It defines the integral development of Mayan Heritage sites as a homogeneous tourism concept for all Mayan archaeological sites. Additionally it focuses on the creation of a chain of enchanting villages with a charming Belizean style appeal, rural tourism sites and routes and seasonal tourism attractions such as traditional markets, festivals and themed programs.

Sun & Beach Tourism proposes the integrated development of sun & beach resort areas, pristine beaches and waterfront experiences in strategic locations on the coast of Belize and on reef islands, namely South Eastern Coast, Southern Coast, Northern Islands and reef islands.

Cruise Tourism aims to structure Belize city and surrounding destination tourism assets as a structured and well managed set of attractive facilities and sites, such as Belize city waterfront experience and embellishment of Belize city colonial heritage neighborhoods, with an interactive welcome center in the Fort George area. Additionally, it will introduce the pocket cruise model as a viable option for cruise visits to the Southern Coast of Belize.

Nautical Tourism structures a system of marinas, ports and services aimed at attracting tourists journeying in vessels (yachts, sail boats, boats, charter boats) across the Caribbean to come to Belize. Additionally, it aims to support the creation of yacht and sail clubs that link with international clubs and attract loyal customers.

Leisure and Entertainment is associated with a mid to high shopping and entertainment destination as it will have fully developed an attractive open-air mid-high end shopping center hosting brand names, restaurants, cafes, bars and entertainment facilities. The target area of development is Northern Belize, which is envisioned to be highly accessible by land, boat and border crossings. In a second order the concept is to be adapted and implemented in Belize City and San Pedro.

Comparing the six product types, the Master Plan places different levels of importance upon them based on the geographical location and asset-base of destinations, as summarised below:

- Culture. The first priority, owing to the existing assets and relative ease of development, the size of the global market, the contribution to image and product diversification, the distribution within the country and potential to reduce seasonality.
- Nature. The most important product to be developed, in view of its growth potential, ability to increase length of stay and relevance to reducing poverty in rural areas, but it will require time and investment in facilities and skills.
- Sun and beach. Secondary importance, with high potential for growth in arrivals but with a marked seasonality and environmental impacts from the construction of infrastructure.
- Cruise. Low to medium importance. Quality depends on other tourism products, there is low potential for increasing spend per head, and it does not reinforce a sustainable destination image. However, it is a sizeable growing market and investment/management is needed to cater for it.
- Nautical. Lower importance. Implementation will be time consuming as it requires additional infrastructure investment, skilled labour and management.

- Leisure and Entertainment. Less important and the most time-consuming. Requires large investment and only small potential to generate overnight stays.

The treatment of markets provides another important strategic framework within the Master Plan, whose approach can be broadly summarised as:

- USA: Maintain as highest priority, requiring ongoing significant investment to continue to secure growth.
- Regional Markets: Attractive markets requiring medium investment, with specific products promoted to meet their interests. Need for connectivity, including regional tours/itineraries.
- Canada: Strong and growing market but of secondary importance requiring improvements in product quality.
- Europe: Highly important and untapped market but will require improvements in quality, connectivity and infrastructure.
- Domestic market. Lower profitability but important partly for socio/cultural reasons.

The bulk of the Master Plan is devoted to two components:

- **The Destination Physical Plan**. This describes, illustrates and maps a regulatory and land use framework covering types of product, styles and types of development, development densities, development models and guiding principles. Detailed approaches and targets are set for the seven geographic areas. Land use strategies are set out, underlining the need for clear policies that are consistently applied, so the developers know where they stand.
- **Macro Implementation Programmes.** Five separate programmes cover: Governance; Sustainability and Quality Assurance; Tourism Infrastructures: Marketing; and Product Development. Each contains a set of sub-programmes and specific projects, described in detail and showing proposed staging and budget requirements.

The very detailed content of the Implementation Programmes is difficult to summarise here. However, it has been taken into consideration in the assessment section of this report.

The National Sustainable Tourism Master Plan is a live document in Belize and is referred to extensively in other policies and plans. It is used as the reference framework for the BTB's Annual Strategic Plan, which includes actions for the six product types. The technical content is drawn upon as relevant in pursuing planning, development, marketing and research activity. However, awareness of the content of the Master Plan is by no means universal and there does not appear to be a systematic and comprehensive implementation of the Macro Programmes as such. The lack of consistency in the strategic direction expressed in the NSTMP, referred to earlier, underlines the need to reaffirm the strategic priorities and framework for tourism in Belize through the revised National Tourism Policy.

A **Responsible Tourism Policy** was prepared as a draft document in 2010. This had the following vision:

Belize's vibrant and dynamic tourism industry contributes to the country's economic growth through a responsible development approach characterized by the following:

- the country's natural and cultural resources are protected,
- there is more equitable distribution of the tourism economic benefits,
- local communities are engaged both in the planning and delivery of more meaningful visitor experiences
- more local products are used and promoted in the delivery of tourism services , and
- the marketing of the country brands the destination as a responsible one showcasing the diversity and uniqueness of each destination within it.

Guiding principles were set out, and included the establishment of tourism development zones. Policy statements included having a strategy that focuses on increased arrivals in the overnight sector. Visitation limits and carrying capacities should be implemented and attention paid to environmental management, mitigating impacts, addressing cultural issues and human rights and building the capacity of communities.

Policy Programme Areas proposed included:

- Public-private partnerships
- Biodiversity and protected areas – improved management and generation of economic benefit
- Destination marketing – refers also to niche and domestic markets
- Investment incentives – for responsible tourism practices
- Certification and best practice – including a national award
- Product development and planning – low impact/low volume – large scale only if selective, with attention to location and regulations – tourism zones to guide development (with zoning standards to take account of climate change) – supply chain and rural communities
- Destination management – coordinating body giving guidance, with targets and benchmarks
- Education and public awareness – stakeholders, residents, officials, investors, visitors.

There are various additional and more specific policies, standards and legislative documents related to tourism in Belize, such as the separate Cruise Tourism Policy. These are not presented here but are referred to, where relevant, later in this assessment report.

APPROVED 12/4/17

2 Tourism trends and performance in Belize

This section considers how tourism in Belize has been performing in recent years in terms of the volume and value of tourism. It starts by providing a global and regional context before presenting a set of national trend data and assessing performance against strategic targets.

2.1 Global and regional tourism growth

International tourism has shown robust and significant growth for the past six years, following the economic crises at the end of the last decade.

Table 1 provides comparative data on international arrivals globally and in the different regions of the Americas over the last ten years.

Table 1 International Tourist Arrivals (millions)

	2005	2010	2015	Annual average growth (%) 2005 - 15
Global arrivals	809	950	1186	3.9
North America	89.9	99.5	127.6	3.6
South America	18.3	23.2	30.8	5.3
Caribbean	18.8	19.5	23.9	2.4
Central America	6.3	7.9	10.3	5.0

Source: UNWTO Tourism Highlights 2016 Edition

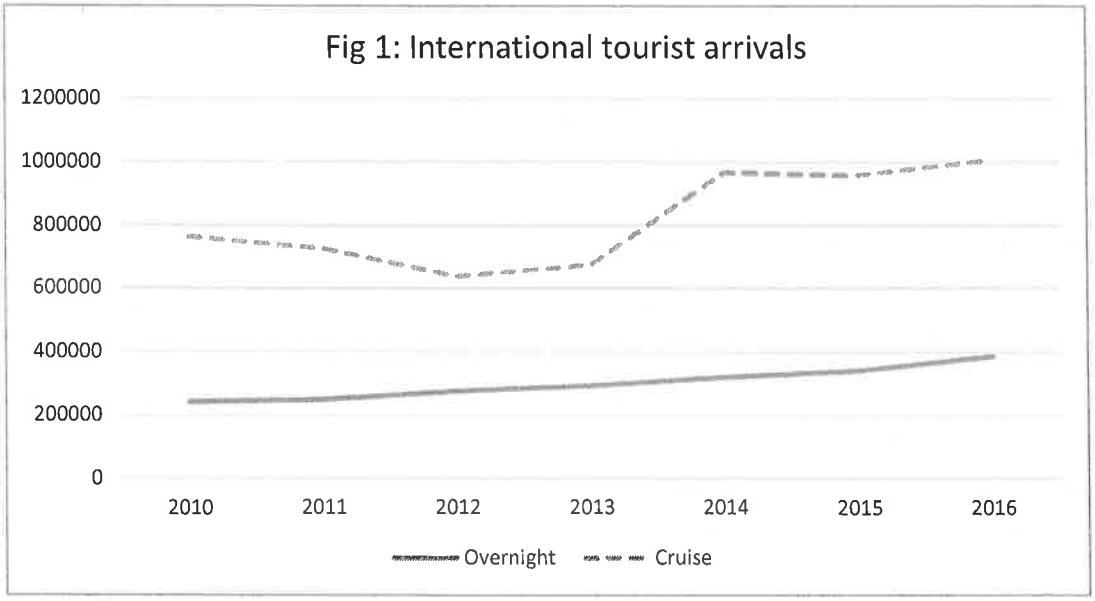
The Americas as a whole accounts for just over 16% of the world market of international arrivals. While North America has been performing close to the global average in the past four years, South America has seen much faster growth, albeit from a smaller base. This has also been observed in Central America. On the other hand, the Caribbean has seen far weaker growth and has lost significant market share in this period.

The annual averages mask yearly fluctuations. Between 2015 and 2014 the Caribbean actually saw slightly higher levels of growth than the other three regions, partly influenced by strengthening of the US Dollar.

According to the UNWTO, international tourism arrivals are forecast to increase by an average of 3.3% per annum globally over the period 2010 to 2030. The Americas as a whole will grow somewhat more slowly (average 2.6% p.a.). As in recent years, Central America is forecasted to show much faster growth (5.2% p.a.) than the Caribbean (2.0%). However, by 2030 the Caribbean will still be seeing higher volumes of arrivals (30 million) than Central America (22 million).

2.2 Tourism growth in Belize

Data on tourism arrivals in Belize are collected separately for overnight and for cruise visitors. Growth patterns for these two sectors are shown below.



Source: Belize Tourism Board

Overnight tourism to Belize has seen steady growth in terms of arrivals. The annual growth rate in international arrivals of overnight tourists has averaged 7.1% between 2010 and 2015, which is significantly greater than the annual average for international tourist arrivals to the Caribbean as a whole (4.2%) and to Central America (5.4%) during that period.

The months recording the greatest number of overnight arrivals are December to March, with least arrivals in September and October. There has been little change in this pattern.

The National Sustainable Tourism Master Plan (NSTMP) set a target of 556,000 arrivals of overnight tourists by 2030 amounting to a compound annual growth rate of 3.8% from 2008. It appears that this is on track to be significantly exceeded.

It is interesting to note that the 2005 Tourism Policy, written in 2004, anticipated that the cruise arrivals, then recorded at 851,436 would level off at 1 million passengers per year in future. In fact the numbers fluctuated over the subsequent ten years but have plateaued at around the 1 million mark in the past three years. However, this may be set to increase significantly, particularly with the recent investment in new port facilities. The Master Plan set a target of 1.5 million cruise visitor arrivals by 2030 (over around 600,000 in 2008) and this may well be reached or exceeded.

The average length of stay for overnight tourists in 2015 was estimated at 6.58 nights, based on the VEMS survey of visitors. This figure has seen a decline in the last few years and is lower than the average of 8.36 nights recorded in the Master Plan for 2008. The Master Plan has a target of 10.6 nights as the average length of stay in 2030. Recent trends suggest that this may not be achieved without a significant change in the tourism offer, connectivity and market response.

2.3 The economic contribution of tourism

Information on expenditure by tourists in Belize is available from various sources showing different results. The World Travel and Tourism Council (WTTC) estimates that visitor exports (expenditure by

international tourists) amounted to $US 396m in 2015[4], with domestic expenditure at $US 71m (including elements of government spending). UNWTO shows expenditure from international tourism at $US 372m in 2015[5]. Data presented in the BTB Digest shows total expenditure (overnight and cruise) as $US 335 in 2015.

In 2015 it was estimated that 85.6 % of total tourism expenditure came from overnight tourism, with 14.4% from cruise tourism. These proportions have remained relatively similar over the last ten years.

Time series data since 2010 show that there has been growth in international expenditure in real as well as nominal terms. The WTTC data show an average growth in expenditure per annum of 8.8% nominally and 6.6% at constant prices, albeit with significant fluctuations year on year. This suggests that growth in expenditure may have broadly kept up with growth in arrivals but without exceeding it in real terms. The data in the BTB Digest indicates very significant growth in expenditure between 2011 and 2013 but some flattening between 2013 and 2015.

The Belize Tourism Policy back in 2005 set a target for growth in expenditure from $US 172.7m in 2004 to $US 279.2m in 2015. It is not clear whether this was expressed in nominal or real terms. Either way, the results in 2015 have exceeded this target.

The Master Plan reported overall expenditure on overnight tourism of $US 248m in 2008 with a target of $ 1,255m by 2030, amounting to a compound annual growth rate of 7.65%. For cruise tourism, the equivalent spend figures were US$ 34m in 2008 rising to US$ 134m in 2030, a growth of 5.89% per annum. Performance in the past five years suggests that this growth may well be attainable.

Some data is published on spending per day by overnight visitors. This was estimated at US$ 155 in 2015 based on the VEMS Survey and, from data published by UNWTO, it appears that there has been inconsistent growth in this figure in the past five years. The Master Plan reported spending per day of US$ 133 in 2008, rising to a target of US$ 213 per day in 2030. It appears that growth in spending per day may not be keeping up with expectations and may not reach the projected targets.

The Master plan showed average spending per visit by cruise passengers at US$ 57 in 2008, rising to a target of US$ 90 per visit in 2030. Figures from a survey undertaken for the industry found an average spend per cruise passenger in Belize of US$ 78 for the year 2014-15[6], which suggests that growth may have been at least in line with this target.

Various figures are quoted for the contribution of tourism to GDP in Belize. In 2008 the Master Plan concluded that tourism contributes anywhere between 18% and 25% of total GDP. In 2015 BTB reported an estimate of 23% of GDP attributable to tourism[7]. The WTTC has calculated that in 2015 tourism contributed 14.7% of GDP in Belize from direct expenditure, rising to 38.6% if indirect and induced impacts are also included. WTTC trend figures show an increase in tourism's direct contribution to GDP by over 2.5 percentage points between 2011 and 2015.

A further measure of tourism's contribution to the economy is the level of support for employment. WTTC estimated that tourism directly and indirectly supported 48,500 jobs in Belize in 2015 (34.8 % of total employment).

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[4] *Travel and Tourism Impact 2016 Belize*, WTTC 2016
[5] *Compendium of Tourism Statistics – Belize*, UNWTO, 2016
[6] *Economic contribution of cruise tourism to the destination economies,* BREA, 2015
[7] *BTB Strategic Plan* 2016-17

Looking further forward, WTTC predicts that the relative contribution of tourism to the overall economy will continue to rise and in total may account for 43% of GDP, supporting 38.8% of jobs, by 2026.

2.4 Performance of accommodation and other facilities

Belize has seen a significant increase in accommodation stock in the last five years. The total number of hotels rose from 664 in 2010 to 861 in 2016, amounting to an increase of 29.6%, with growth occurring particularly in the Northern Cayes, Cayo and the South East Coast. Room numbers increased from 6,822 to 8,212 during this period, a smaller proportionate increase of 20%. In 2015 almost three quarters of all hotels had ten rooms or less, with only 13 hotels with more than fifty rooms.

Hotel occupancy remains relatively low in Belize, at 42.8% in 2015. While this is a considerable improvement on the low point of 2010 (34.9% occupancy), it is lower than in the previous two years and early results for 2016 indicate a further drop. This may partly reflect new stock coming on stream.

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.

Turning to visitor attractions, annual data is available on the number of visits to archaeological sites. Total visits to eleven sites where numbers were recorded amounted to 200,448 in 2010 rising to 337,835 in 2015. This equates to an average increase per annum of 11%.

2.5 Relative satisfaction levels

An important measure of tourism performance is the response of visitors to the experience. Some evidence is available from the VEMS survey, which shows the percentage of tourists rating various aspects of their visit as good, average or poor. Based on the percentages for 'good' (shown below in brackets) the results in 2015 revealed:

- Least satisfaction with domestic transportation (63%), value for money (65%) and entertainment (67%)
- Highest satisfaction with marine attractions (91%), national parks (87%) and archaeological sites (86%)
- Amongst visitor services, tours scored most strongly (83%), with accommodation (78%) restaurants (74%) international air connections (73%) and immigration services (73%) being less highly rated.
- Personal safety was rated as good by 77% of visitors, with only 1.2% considering it to be poor.

A survey amongst cruise visitors in 2014-15[8] also found high levels of satisfaction with the tours taken in Belize, with an average satisfaction score of 8.8 out of 10.

[8] BREA – ibid.

3 Assessment of key policy issues

An initial round of consultation has been held with key ministries, agencies and private sector organisations to explore the main issues, including both challenges and opportunities that need to be addressed in the revised tourism policy.

From this, 16 policy areas have been identified and a summary of the main points arising under each is presented below.

3.1 The shape and balance of tourism in Belize

The value of tourism to the economy of Belize is widely recognised and it is anticipated that the country will continue to rely heavily on the sector.

Tourism policy in Belize needs to look to the long term. However, overall, while much can be improved, there does not appear to be a call for an entirely different and radical approach.

While recognising its macro-economic contribution, tourism needs to be shaped to meet the needs of the people of Belize, improving their quality of life. This follows the ongoing philosophy behind Horizon 2030. Over-dependency on tourism should be avoided and there is an increasing emphasis on the need for cross-sectoral support and integration.

As in many destinations, there is a general desire to see an increase in the value of tourism as a priority over an increase in volume. This requires a policy that continues to seek a growth in spending per head. Likewise, there is clear benefit from achieving a more even spread of tourism throughout the year, filling any troughs in demand, although compared with many destinations tourism in Belize is not unduly seasonal. In terms of geographical spread, there appears to be an even greater desire than in the past to deliver tourism spending and benefits to the different parts of the country. This fits with a new emphasis on area-based tourism planning and development.

Current policy in Belize at all levels underlines the importance of the cultural and natural heritage and the role that it can play, largely through tourism, in delivering economic benefits. The need to support heritage assets through tourism, and vice versa, remains very clearly understood.

There is general recognition that Belize must continue to adhere to the principles of sustainable and responsible tourism. These have been articulated in various forms in all the recent tourism policy statements. However, it is unclear whether the breadth and depth of these principles are fully understood by tourism stakeholders and there may be a need for more clarification of their meaning, linked to priority areas for action.

Some consultees have identified a dichotomy between tourism development on the one hand and environmental conservation on the other, with opinion divided as to whether the one or the other is over emphasised. There is a danger that dwelling on this unresolved debate can lead to stagnation. There is a need for a balanced and integrated approach that favours and actively encourages well planned sustainable development in the right place, while recognising the imperative of conserving natural and cultural assets.

The importance placed on achieving this balance and ensuring the quality and sustainability of Belize's product offer requires that sufficient resources are put into tourism planning, development and

management. Some consultees feel that this aspect is under-resourced compared with tourism marketing.

Debate about the current and future shape of tourism in Belize has frequently become caught in the perceived divide between 'cruise' and 'overnight' tourism. The subject continues to split opinions. There remains a deep-seated concern that the pressures arising from cruise tourism threaten the quality of the longer stay offer and Belize's brand image. There is a widespread call for any future development of cruise tourism to be extremely carefully planned and for excursions by cruise passengers to be very well managed, while seeking to optimise on the economic benefits obtained from their spending. There may be a need to soften the perception of a divide, with a policy that promotes quality cruise and quality overnight tourism while seeking to make both more sustainable.

Finally, one dichotomy in Belize that is hugely valuable and strengthening to the position of the country as a tourism destination is the presence of both a marine/coastal and inland/heritage offer. Similarly, the opportunity to be projected as both a Caribbean and a Central American country, making the most of all the traditions, images and institutions associated with both regions, is an enormous strength which must continue to be reflected in future policy and action. These are areas of widespread support and agreement.

3.2 Target markets, branding and promotion

In general, feedback on the marketing of Belize has been positive, with little call for significant change. BTB's marketing programme is in line with the NSTMP and continues to be informed by it.

There has been a significant level of consistency over recent years in the spread of source markets coming to Belize and in the identification of primary target markets. The focus has rightly been kept on North America, while seeking to diversity this through focussing also on South and Central America and working on future opportunities to build up the European market offer.

The future approach to target markets should partly be driven by a need to spread the risk, maintaining links with a variety of markets in an increasingly uncertain economic and political situation.

Arguably, more emphasis might be placed on regional (Central American and Caribbean) countries and on the domestic market. This also fits with a policy of mitigating climate change from tourism activity. It has implications for intra-regional connectivity. In previous strategies the domestic market tended to be treated as an afterthought, but it can help to support a policy of spreading tourism spending geographically and seasonally and supporting activity within local communities.

The need to articulate and deliver on a clear and genuine brand position should form a key part of the tourism policy. Currently, the Belize brand reflects the richness of the combined marine, natural and cultural offer. There does not appear to be any reason to change this. More attention could perhaps be given to ensuring that a wider range of tourism stakeholders reflect the brand in their own promotional activity. Likewise, it is very important that the visitor experience on the ground delivers on the brand promise, with implications for product offers and quality. A particular issue is the extent to which the country should be promoted as a sustainable destination and whether it can genuinely deliver on this claim.

The need for effective promotional activity, making the most of new technology, was emphasised in the NSTMP and has been pursued by BTB and others, including though the use and spread of expertise on digital marketing. This should be maintained.

An area of some weakness is the presence and visibility of visitor communication on the ground, notably in the signage of attractions. Policy needs to address directional signage on roads, in conjunction with the Ministry of Works, and signage of specific sites with the relevant management agencies.

It is important that the promotion of local destinations within the country is properly coordinated. Small and under-funded marketing initiatives for individual destinations can be ineffective unless they are part of a wider campaign. Any new focus within the tourism policy on destination level activity should include provision for the coordinated promotion of coherent local brands that tie in with the national brand. Provision of tourist information can be successfully undertaken at a local level but again can be more effective within an integrated network. This could be an area of focus for Local Tourism Committees within a national framework.

As competition increases there is a need for tourism marketing to become more sophisticated and directed, with optimum use of new technology. An opportunity over the next five years is to link product offers more directly to identified market segments, including the exploitation of niche markets which is currently being pursued.

The need for far better data on tourism markets and their interests, including enhanced feedback from visitors on their activities, likes and dislikes, has been frequently underlined. BTB has identified this as a key requirement for improving marketing performance.

The policy should point to the opportunity for joint marketing initiatives, where appropriate, with regional partners. This in turn can include the sharing of data and information.

3.3 The product offer

This policy area is about the type and spread of tourism products and experiences in Belize. Issues of product quality and standards are covered later.

An important principle is that policy towards product development should be informed by market knowledge, so that supply is matched to current and future demand. This further underlines the need for market research and feedback and its dissemination.

A sizeable part of the NSTMP is devoted to product development, focusing on the six product types described on page 11 of this report. There is a need to refresh this approach and consider whether the product types should be retained, grouped differently, replaced or supplemented with alternative products.

A number of points for further consideration for refocussing the treatment of the product portfolio, apparent from the consultation, include:

- A greater focus on aquatic tourism, including diving, snorkelling and fly-fishing, together with emerging marine activities, which are key components of the Belize experience.
- More attention to the beach and waterfront product which needs enhancement in some areas.
- Attention to extreme adventure products and new activities for which policy and legislation are weak.
- The strategic approach to linking individual products/sites, such as through themed routes and trails, and how this will relate to markets.
- The considerable strategic interest in developing more product experiences based around local heritage, events and festivals, linked to policy areas concerning culture, community engagement and the rural economy.

- The extent to which there are genuine opportunities in product areas such as Leisure and Entertainment and MICE tourism, as distinct from those for which Belize has a clearer comparative advantage, such as culture, nature and marine based tourism.

Rather than pursuing this in detail, the revised tourism policy may need to step back from it and consider the wider strategic issues surrounding the product portfolio, which can help in guiding the approach to the current NSTMP and its future revision. The National Policy should focus on the process: how is product development carried out; how are products managed and monitored; what type of planning and product development approach should we engage in? The need to recognise and respond to international trends and opportunities for new types of product should be underlined.

The portfolio of hotels, resorts and other forms of accommodation is arguably a weakness in Belize, affecting its attractiveness and competitiveness as a destination. The need for more internationally branded hotels and a higher percentage of quality rooms has been recognised. This may require a clearer and more proactive policy to secure the necessary investment. Priority should be given to forms of accommodation that deliver the greatest economic benefit within local tourism value chains.

The rapid expansion of the so called 'sharing economy' involving private individuals providing accommodation and other tourism services on a more or less commercial basis, sold through sizeable digital platforms such as Airbnb, is occurring in Belize as in almost all other countries. It needs to be addressed through policy. The favoured approach is to see this as a new opportunity for expanding the economy and spreading benefits. However, concerns such as fair competition, consumer protection, labour conditions and intrusive impact need to be addressed. The policy should be based on an audit of the size of the phenomenon, dialogue with all concerned, the design and enforcement of appropriate regulations, and provision of positive support for beneficial initiatives.

3.4 Quality and standards

There is widespread recognition of the need to raise the quality of the tourism offer in Belize and ensure that it is more consistent and reliable. This was a concern back in 2005, with the Tourism Policy calling for more product that was 'export ready', i.e. of an international standard. The challenge remains.

A primary way of addressing quality is through the setting and imposition of standards. The BTB and others are actively involved in this. The focus is placed on ensuring that minimum standards are met in the different sub-sectors of the industry. There is some debate about how far this should reach into more subjective issues of quality and levels of service, with some industry bodies believing that this should be influenced by the market rather than through standards and regulation.

Policy should address the level of coverage that is required by standards and support their extension where appropriate. The BTB has an ongoing programme of updating standards and extending them into new areas of tourism product, most recently covering action-based attractions and types of aquatic tourism.

An area for further attention is the integration and streamlining of quality standards with other standards (e.g. concerning environmental management) and regulations. The requirements and procedures need to be made as clear and simple as possible for operators to follow.

A key challenge, widely identified, is the need to ensure effective enforcement of standards. This is partly a matter of resources for checking on compliance and the application of fair penalties. For

example, the BTB has been working with the Tourism Police Unit on strengthening enforcement through spot checks. However, it is equally about engagement and support from tourism stakeholders.

Tourism operators must be directly involved in the design and development of standards. They should be encouraged to see them as their own standards for their sector, from which them themselves benefit, not something belonging to government. Compliance can be better achieved through a degree of peer pressure and self-policing.

In a world increasingly driven by social media, greater attention should be given to ways of harnessing consumer feedback and customer-generated ratings to drive up quality.

Improving quality is not only about standards. Other policy areas such as HR and training and support for investment are clearly directly relevant here.

3.5 Cultural tourism

The strong and supportive links between tourism and culture are well understood in Belize. In the past they were covered by one Ministry. Within the current arrangements it has been stressed that the closest possible links must be maintained, requiring that the culture and tourism ministries and agencies (MTCA, MEYSC, NICH and BTB) are mandated to work closely together.

The recent Belize National Cultural Policy 2016-2026 treats tourism as integral to the role of culture in addressing national development and poverty eradication. It points to the need to develop sustainable levels of cultural tourism that benefits local residents and institutions while adopting measures to ensure that it does not harm the integrity of Belize's cultural identity. It contains a number of product development and marketing proposals, reflected blow.

Archaeological and other cultural heritage sites provide a major component of the tourism offer in Belize. Some commentators have expressed concern about degradation of sites such as Altun Ha from visitor pressure. NICH has put in place various physical and management measures at a number of sites and it is important to ensure that resources are available to maintain and extend this work.

Specific issues relating to cultural tourism at heritage sites, with implications for policy, include:

- the need to avoid damaging development and activities in areas surrounding the sites
- improving quality of trading and concessions at sites and obtaining more benefit from this
- improving access roads to certain sites and opening up other sites to well managed tourism
- linking sites within and beyond Belize, including making more of Maya themes/routes.

While the focus of attention has been on the archaeological sites, there is a significant opportunity to make more of Belize's colonial heritage and architecture, in Belize City and elsewhere, as a component of the visitor experience.

Intangible and living culture is increasingly recognised as an enriching part of the visitor experience. Too little has been made of this to date in Belize, although the potential is strongly identified in the NSTMP and the National Cultural Policy. It should be further emphasised in the revised tourism policy as it relates to various strategic development objectives. There is a particular need to improve the availability of traditional artisanal products for sale to tourists, with capacity building for producers and assistance with access to market, building and improving on the Unique Belize project. Similarly, assistance could be given to improve the quality and accessibility of live music and performances and other aspects of living cultural heritage. There is also an opportunity to make more of cultural events

and festivals, through information, marketing and creative development in conjunction with local communities.

3.6 Natural heritage and protected areas

The marine and terrestrial natural heritage of Belize is a major tourism asset, much of which lies within designated protected areas offering excellent opportunities to view wildlife.

Since the mid-nineties Belize has had a considerable reputation for pioneering initiatives that link tourism to wildlife conservation, notably through the introduction of the Tourism Conservation Fee as a major source of income for the Protected Areas Conservation Trust (PACT). However, current policy studies, notably the National Protected Areas System Plan, have demonstrated the significant financial challenges in managing the extensive network of protected areas, which involves a range of different management bodies often with limited capacity and resources.

There is a strong call from the Forestry and Fisheries Departments for the tourism sector to deliver further support for conservation. This is also endorsed by the institutions supporting protected areas, such as PACT and APAMO, which are themselves taking a more project and business focussed position in their work.

A number of opportunities for strengthening revenue from tourism have been identified, including:

- Further application of admission fees where appropriate, based on demonstrated willingness to pay
- Establishing more concessions with private sector operators for the provision of visitor facilities and services in and adjacent to protected areas, based on the identification and application of sound public-private partnership models
- Developing tourism activities as a source of income for rural communities located in or near to protected areas, some of whom are directly responsible for their management
- Ensuring that income raised from tourism stays in the local area and can be used for management and conservation.

Tourists could be brought more directly into the picture, providing them with better information on how their spending, including on fees, taxes and charges, supports conservation and identifying additional ways of contributing.

More thought needs to be given to the range and quality of nature and adventure based tourism products and experiences that are offered. Internationally, the market for wildlife watching has remained strong, and there is an increasing interest in wellness as a theme in natural areas. There is a need for further clarity around the concepts proposed in the NSTMP for Ecotourism and Adventure Activity Centres and Sites. Protected Areas that provide for recreational activities should be better integrated within the tourism sector, with quality offers based on sound product development, facility provision, management and marketing.

The tourism policy should also be concerned about the impact of tourism on sensitive natural sites and habitats. More work needs to be done on the practical application of management models based on carrying capacity and identified limits of acceptable change, both of which require effective monitoring and evaluation. This may require further support and coordination amongst the different management entities. Internationally there has been increasing use of codes of good practice for wildlife encounters, addressing issues such of the feeding of marine and terrestrial species. They could be applied more widely in Belize.

3.7 Cruise tourism

The development and management of cruise tourism is a key issue for the tourism policy of Belize. Consultation has revealed an ongoing high level of concern about the impacts of this activity as well as recognition of the economic rewards. There is also a strong feeling that cruise and overnight tourism should be addressed together in the development and management of tourism in Belize.

A separate cruise tourism policy has existed for many years with some revisions. It is being reviewed by BTB and this should be reflected in the new tourism policy. The current objectives stated in the cruise tourism policy appear to be still relevant: increasing numbers of ship calls and passengers in a sustainable manner; optimising revenue from passenger expenditure; benefitting other sectors (e.g. supplying ships); managing on-shore capacity; expanding attractions; exploring other port/anchoring options; converting cruise passengers to overnight stays. However, there are significant issues with the levels and limitations of this activity, how it is managed and questions of responsibility, compliance and liability.

Visitor management of cruise passengers on shore is a key area of concern for policy and action. There is an underlying requirement for better data and monitoring to guide decisions. The need to adhere to a maximum limit of passenger arrivals per day is generally recognised, with a figure of 12,000 being currently considered although clarity and agreement on this is required. The 2005 Tourism Policy proposed the separate designation of sites/attractions for the cruise market. Such separation has been broadly rejected. However, the current cruise tourism policy points to the need for carrying capacity limits to be identified for sites and be used to limit visitor flows. Irrespective of the use of precise limits, there is a need for the effective scheduling of ship arrivals and visits to specific sites, together with ensuring that effective management is in place at the sites.

The policies and operational procedures of the cruise ship companies can have a considerable effect on impacts. Issues include environmental management and handling of waste, purchasing policy (including fair engagement with local tour operators and businesses), docking and tendering procedures, as well as engagement with the above visitor management issues.

There is a strong need for ongoing and constructive dialogue with the cruise companies and the operators who work with them. This should include agreement on the revision and implementation of the guidelines attached to the current cruise tourism policy. The NSTMP proposed the establishment of a Belize Cruise Negotiation and Destination Management Committee. Current liaison committees, such as for the Fort George Tourism Zone, cover practical management issues rather than addressing future cruise tourism policy and best practices.

Rather than just focussing on minimising negative impacts, policies should underline the need to offer a high quality experience of Belize to cruise passengers. This includes the quality of facilities and services at the points of arrival and the surrounding area, notably in Belize City which is addressed in detail in the NSTMP.

The tourism policy needs to be clear about any future expansion of cruise tourism, including the location and scale of any further port facilities and the type of vessels that might be accommodated. The fact that the Harvest Caye development in Southern Belize, for instance, led to some friction with stakeholders for presenting a deviation from what was proposed by the NSTMP, illustrates the urgent need to address cruise investment and development at the policy level. The need to manage future growth and ensure effective local dialogue is clear.

3.8 Social issues, safety and security

Levels of crime and socially unacceptable behaviour have been increasing in Belize. To some extent this is fuelled by tourism, in part by the behaviour of certain tourists but also generally by the potential for tourism development and growth sometimes to be a source of social tension, inequality and exploitation, as well as delivering significant economic and social benefits. Tourism policy should reflect the principles of social inclusiveness and responsibility.

Particular areas of concern include misuse of alcohol and drugs, sex tourism and inappropriate behaviour in public, as well as more general negative impacts on local culture and society, including access to traditional livelihoods. Solutions need to focus on planning and managing the pace, location and nature of development and change, as well as improved communication with tourists and local stakeholders, greater vigilance and, where necessary, enhanced policing.

Various social issues are related to tourism employment and working conditions, which are covered in Section 3.12 below.

A further social dimension to tourism policy, guided by principles of equity and inclusiveness, is respect for human rights and the provision of equal opportunities for all, irrespective of gender, sexual orientation, ethnic origin and physical or other disabilities. This should affect both the supply and demand sides of tourism, including career opportunities and access to recreation and tourism facilities. Further consideration should be given to the degree of equity and openness in these matters in Belize and priorities for improvement.

Social stability and especially levels of crime can affect the wellbeing and safety of visitors. This has been identified as a significant threat to tourism in Belize. While the vast majority of tourists will not be affected by this and may be unaware of it, further reputational damage to the country's brand could occur, with serious consequences. Tourism businesses report that the provision of the necessary security arrangements for themselves and their guests is a significant and growing cost burden.

The Tourism Police Unit has a direct responsibility for visitor safety and security. The Unit reports that its resources are stretched, especially on peak days for cruise ship arrivals. They are calling for more manpower and equipment. They see their role as both enforcer and informer. They have identified the need for further training in the latter capacity, to improve their communication skills with visitors. There is also a need to address the distribution of resources to ensure that they are deployed where and when they are most needed. This will be helped by improved scheduling and advance information on cruise ship arrivals and visitor flows.

It is important that visitor safety and security is not considered to be just an issue for the Tourism Policy. It should also be a key concern for policies relating to law and order, social welfare, education and other aspects of sustainable development. All tourism service providers should take the necessary actions to protect the wellbeing of their guests and this should be built into standards and guidelines. Sensitive visitor information and communication is also important.

The tourism policy should ensure that crisis management plans are in place for the sector, addressing visitor safety and security as a primary objective.

3.9 Climate change and environmental management

Climate change presents a major challenge for Belize, which has been identified as one of the countries most at risk from its impacts, with considerable implications for the tourism sector.

Belize 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". – i.e. to address both mitigation and adaptation. A fundamental requirement is to mainstream climate change into policies for sectors such as tourism. Scant attention was paid to it in the 2005 National Tourism Policy or the NSTMP. This needs to be rectified.

There appears to be widespread agreement within the industry in Belize that it must play its part in adjusting to climate change but so far the response has been relatively limited and undirected.

Mitigation measures identified in the NDC and taken from wider environmental policies include: reducing deforestation, protecting mangroves, improving energy efficiency and the use of renewables (including in the transport sector), and improving solid waste management. This has obvious implications for the location and operation of tourism businesses.

The impact of climate change on tourism will come from changing temperature and weather patterns, rising sea level, storm surges and other effects. This will cause coastal erosion, beach loss, flooding, coral bleaching, destruction of habitats, water shortages, damage to property and other impacts on visitors and businesses.

There is a significant need for proper planning and data gathering on the progressive impacts of climate change on key tourism destinations. The fact that much of Belize's tourism activity occurs in the Coastal Zone indicates a clear vulnerability for the sector, which should be highlighted and addressed in conjunction with Belize's National Climate Change Policy and Plan.

The required adaptation measures include:

- Mapping of the most vulnerable areas to influence future development plans
- Setting and enforcing regulations on development, including site selection, coastal setbacks, building design etc.
- Diversifying the product offer towards less susceptible forms of tourism
- Management activity to minimise effects, e.g. coastal protection, supporting coral conservation and resilience, reducing water consumption.
- Establishing destination-level disaster preparedness plans, as identified in the NSTMP.

The NDC has shown how mitigation and adaptation measures are interrelated and can be mutually supportive. Indeed, 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.

In general, the tourism sector in Belize needs to become far more sensitised and engaged in environmental management. This can be assisted by supportive policies and actions including:

- Installing necessary infrastructure and management programmes in destinations, such as recycling and waste treatment;
- Enforcing minimum environmental standards for tourism businesses;
- Provision of training, guidance, advice, and financial incentives

- Emphasising and illustrating the economic and other benefits to businesses themselves
- Recognition of good practice through certification schemes and awards.

3.10 Physical planning and development control

Having effective processes in place to plan and control development is critical for 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. This is a sensitive issue in Belize and has been raised widely in consultation.

Land use planning policies should support forward planning and zoning to guide the location of development. The role of the NSTMP is very important here as is the Integrated Coastal Zone Management plan which was prepared with close reference to the NSTMP. The status and use of the Destination Physical Plan element of the NSTMP, including its guidance on location, density and design of different types of tourism development as well as its spatial plans, should be reviewed and where appropriate strengthened in the revised policy. The revised policy should also point to key areas where the NTSMP Land Use Framework can be integrated in current development review processes, and reflected in relevant physical planning instruments. In some locations there may need to be more detailed planning and land use guidance informed by further studies.

The process of assessment of development proposals is critical. Environmental Impact Assessment (EIA) procedures and their application need further strengthening and are being reviewed by the DoE. This includes consideration of schedules relating to the level of EIA, if any, that must be applied to different types of development. Concern has been expressed that EIAs should be carried out earlier in the process of granting development approval and should take a wider look at positive and negative impacts, including social and economic as well as environmental. Conditions imposed on development should be more assiduously applied and followed up. The DoE is introducing Strategic Environmental Assessment (SEA) methodology which should address some of these concerns.

It is very important that active representation of tourism sector interests is retained on the National Environmental Appraisal Committee, which plays a key role in reviewing evidence and determining applications for development.

The planning process should be used positively to guide and support good quality tourism development and operations, based on sound design and sustainability principles. The need for new or improved guidelines for some types of tourism development has been identified. Examples include the use of over-water structures and live-aboard boats used for tourism purposes.

3.11 Investment and business support

There has been a considerable amount of investment in tourism in Belize in recent years. Overall, the country is amongst the highest ranked in the region in terms of investment and tourism accounts for the majority of FDI received. However, there is a general feeling that there should be an increased level of investment in tourism and that it should become more inclusive. Barriers remain high and starting a business is considered to be very difficult and expensive in Belize.

An overriding principle is to ensure that investment processes are as smooth and efficient as possible. Investors need clarity about the types of projects that are likely to be approved and the regulations

they need to meet. This applies in particular to the planning and development control procedures referred to above. The NSTMP was highly welcomed by Beltraide as it enabled them to introduce positive opportunities to investors. This approach should be further strengthened.

Further attention should be given to the needs and opportunities presented by different types of business and investment models. The need to encourage more investment in tourism by local Belizeans has also been underlined. Public-private partnerships are believed to offer particular potential and should be more strongly fostered in Belize. There has also been a call for more focus on the needs of SMEs in tourism, in terms of investment and overall business performance. Concepts and models for expansion of PPPs and support for SMEs are addressed in some detail in the NSTMP within the macro-programme on governance.

The lack of incentives to stimulate investment in tourism has been criticised. There is some difference of opinion as to whether sector-specific incentives should be made available universally or whether they should be designed to encourage particular forms of investment that meet agreed conditions.

In general, regulatory burdens on the establishment and operation of tourism businesses should be minimised, streamlined and clarified, while still ensuring that necessary standards and controls are enforced, as identified elsewhere in this report.

The taxation landscape in the tourism sector is widely considered to be too complex and sometimes unequitable, requiring further review and reform. Some taxes are unfairly duplicative. Loss of tax revenue through defaults on payment or leakage outside the country is also an issue for the sector.

The potential for a focused investment platform for tourism, in the form of a Tourism Development Trust, has been recognised in Belize, including in the NSTMP. This will address the priority given to securing the sector's investment needs. It will require further clarification in the National Tourism Policy and coverage in revised legislation.

There may be potential to increase levels of advice and support to tourism businesses, especially SMEs. An example identified by Beltraide is the use of professional retirees who could provide mentoring or serve as angel investors, which would require some changes in legislation.

The use of incentives and other forms of business support should not only be aimed at new development projects but also at much needed quality improvement within existing enterprises, including improvement in their environmental management.

3.12 Human resources and capacity building

The availability of human resources able to provide a quality level of service is a major weakness and challenge for tourism in Belize and has also been identified by CTO as a top priority area to address across the Caribbean.

The main problem is in filling posts that require a higher level of skills, notably in catering and other aspects of hospitality management. There is a general lack of human resources with relevant training and experience. However, there is also a need to improve skills and capacity in a range of services including general customer care, tour guiding, communications (including language skills) and other areas of business. To some extent evidence about this is anecdotal and a comprehensive training needs assessment within the sector would be helpful.

Various bodies exist who are potentially in a position to meet the identified needs, including the network of ITVETs, Beltraide-BTEC and the University of Belize amongst others. However, there is a risk of potential duplication between them. A coordinated solution should be pursued supported by government and the tourism industry bodies. The idea of a new Hospitality Vocational Training Centre, proposed in the NSTMP, is still considered relevant and should be investigated further, while placing priority on achieving a coordinated approach between the various providers.

In order to feed future labour supply requirements there is strong support for a new awareness campaign in schools and amongst young people generally, promoting careers in tourism.

An issue that may relate to the labour supply problem concerns the quality of jobs in tourism and conditions of employment. The provision of 'decent work' is a central pillar of the international Sustainable Development Goals and has been widely recognised in the tourism sector as a high priority in the delivery of sustainable tourism. Issues for the sector include low levels of pay, unsocial working hours, limited employment rights, low levels of representation and lack of social security, amongst others. The extent to which this a problem in Belize is unclear and has not been addressed in previous tourism policies. However, some issues identified during the consultation related to the employment of migrant labour and problems with transport to work for employees. This whole area needs further consideration in terms of a potential policy response.

3.13 Local destination areas and their management

In the last few years new initiatives in the coordinated planning, development and management of tourism in Belize have been focussed at the local destination level. This approach has been able to build on, and be guided by, the NSTMP but has addressed the tendency of the latter to be too top-down and conceived from the centre with insufficient local engagement in its delivery. This destination level approach is entirely in line with global thinking on sustainable tourism development and is applied in many countries, led by multi-stakeholder local destination management organisations.

Destination development plans have been prepared locally. While some destinations and communities have developed these independently, the MTCA has begun a countrywide process of developing nationally endorsed Destination Plans as a new approach to planning and product development. These have analysed the needs and opportunities in each area, set a vision and objectives, and presented an action plan. The main challenge now rests with their implementation.

The success of this approach depends very heavily on the establishment of effective structures to engage local stakeholders, bringing together local government (Municipalities and village councils), tourism businesses and civil society bodies. Some destinations have established Local Tourism Committees (LTCs) and in other areas there are local industry entities such as BTIA chapters. The nature of these LTCs and other local groupings varies between the destinations. Further attention needs to be given to this, including the extent to which the Committees feel real ownership of the Destination Development Plan and have the resources and capacity to deliver it. This is partly about local leadership, engagement and communication as well as realistic staging of actions, focusing aspirations and expectations, regular reporting and securing necessary funding.

Local Mayors have generally expressed their support for this approach and in many areas are supporting local initiatives, with the Municipalities playing the role of a hub for the wider area. More effort may be needed to strengthen the involvement of tourism business, including in the funding of projects and engagement in public-private partnerships. There has been some call for a higher

proportion of central government funding for tourism and resources from accommodation levies to be made available locally. Consideration needs to be given to how these issues, and the whole destination level approach, should be reflected in the national tourism policy.

Destination development plans and action can cover a range of initiatives, including improving the appearance of the area, environmental management, provision of visitor infrastructure, identification and support of new product opportunities, linkages between sites and businesses, establishing and promotion of events and festivals, etc. There should be active engagement with local cultural heritage assets and protected areas.

Work at this level should partly focus on improving the level of engagement and benefit of local communities in tourism. This should include support for local tourism businesses and visitor experiences at a community level. It should also seek to develop more cross-sectoral linkages. For example, a particular opportunity has been identified to strengthen links with agriculture and fisheries, increasing the supply of local and sustainable produce and seafood to catering establishments and for sale in markets visited by tourists.

3.14 Tourism transport and connectivity

Ease of access from source markets is an important issue for any destination seeking to grow its tourism sector. Belize has relatively poor connectivity although this has been improving with new services from the USA, Canada and other parts of Central America. Internal public transport is also of a relatively poor quality. In general, weak connectivity and long journey times may affect average length of stay in Belize.

Faced with this situation, improving connectivity should be seen as a strategic priority for tourism. The topic was given only passing reference in the NSTMP. During the consultation there was a call for increased coordination in the planning of tourism and transport, with more dialogue between BTB and transport bodies. The forthcoming National Transport Plan should help in this respect and should link to the revised tourism policy.

Currently the country is becoming more aggressive in negotiating and establish Air Service Agreements with regional and international jurisdictions to boost the potential for additional airlift. Consideration might be given to stepping up promotion to carriers, marshalling the tourism arguments as well as addressing logistical and technical issues. Where appropriate, this could involve collaboration with regional partners, such as the CTO which is actively negotiating to achieve better connectivity to and within the region, such as improvements to transit arrangements at the Miami hub.

In parallel with the above, there is a need to address standards and capacity at Belize's airports, improving facilities and bringing operations more into line with international best practice. Lack of air-traffic controllers is an example of the current limitations affecting future expansion of services.

Opportunities exist for making more of water-based transport as a component of connectivity, including improving existing services to key sites.

Public bus services need improvement. Many of the busses in use are outdated. The quality and availability of taxis is also inconsistent and the need to address the quality of rental car services has also been identified. The potential for new transport modes, such as ride share schemes, should be considered. Establishing more public-private partnerships in transport provision may be part of the solution. These may be issues that are addressed in the forthcoming National Transport Plan.

A wider aspect of connectivity is the need to improve the ease of visitor movement across the land borders with Guatemala and Mexico. This is especially important to tourism growth in neighbouring areas of Belize such as Cayo and Corozal. This includes enabling the provision of through transport services.

3.15 Tourism data and evidence gathering

There is universal agreement that tourism planning, development, management and promotion should be informed by better data and objective evidence. The revised tourism policy should itself draw on what is available, while identifying research and evidence gathering as a priority for action.

The MTCA is currently engaged in developing new sets of data including ongoing work to prepare a Tourism Satellite Account (TSA) and GIS mapping of development projects. Output from this will inform tourism policy and its implementation over time.

A number of areas requiring more detailed quantitative and qualitative evidence have emerged during the consultation and reflect other priority areas identified in this report, including:

- The characteristics and interests of potential target markets
- Visitor satisfaction, including specific likes and dislikes
- Visitor distribution, spending and activities broken down by local area, to guide destination level planning and action
- Value chain analysis to show the proportion of spending reaching different players, the degree of leakage and the actual economic benefit to local communities
- Daily and peak time visitor volumes at specific sites and measures of impact against pre-determined indicators, to guide carrying capacity and assessment of acceptable change
- Income generation in cultural sites and protected areas.

There is a general call for more data sharing between ministries and agencies in relation to policy areas of mutual interest. Examples would be transportation load factors or crime levels in different locations. A particular requirement in tourism policy is the establishment of a tripartite relationship between the Central Statistical Office, BTB and the Central Bank in developing the TSA.

The level of monitoring of activity and results against the objectives and targets of the previous tourism policy and NSTMP has been insufficient. The need to pay far more attention to monitoring and evaluation in the sector is widely accepted.

3.16 Governance and delivery structures

This final area is essentially concerned with governance and coordination structures and responsibility for the oversight and implementation of tourism policy.

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.

Previous tourism policies and plans in Belize have followed this approach. The National Tourism Policy in 2005 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. Questions have been raised as to whether they are needed or workable, with coordination being achieved more informally or through existing bodies such as the EDC, CEO Caucus and Cabinet Investment Committee, possibly with subsidiary committees or working groups established specifically for tourism. The situation needs further clarification and resolution.

The revised National Tourism Policy should clearly and explicitly identify the purpose and function of the MTCA and its role in the development, promotion and implementation of the policy.

The BTB has remained the primary executive agency for tourism in Belize. Currently it undertakes a destination planning, product development and quality assurance function as well as being responsible for marketing and revenue collection. Whether these multiple roles should be carried out by one agency has been the subject of considerable debate. The NSTMP proposed the establishment of a National Sustainable Tourism Trust Fund which would have responsibility for destination planning and stimulating development. The body would be partly engaged in raising and disbursing funding and partly in planning and execution, although it is uncertain where the balance between them would lie. The situation needs clarification and agreement, avoiding problems of duplication between prospective bodies and ensuring that resources are focussed on output and not on administration.

The very important issue of effective governance, coordination and engagement at a local destination level has been addressed earlier. However, there is a need to give more consideration to structures and mechanisms for supporting and coordinating local area activity from the centre.

Finally, there are also issues of tourism governance at a supranational level, notably in engaging with regional structures and policies for the Caribbean and Central America. Further consideration should be given to the effectiveness of Belize to date in influencing and benefitting from regional tourism policies and actions and how this can be strengthened through the revised National Tourism Policy.

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4 Conclusions and recommendations: towards a revised tourism policy

This final section starts with a summary of principle conclusions based on the assessment of the current policy context, the recent tourism performance in Belize and the key policy issues that have been identified in this report. It then presents some recommendations for consideration in the shaping of the revised tourism policy.

4.1 Conclusions from the assessment

- There is already a wide landscape of policy into which the revised National Tourism Policy must fit. Largely this is directly relevant to the issues identified in the tourism sector in Belize. No significant contradictions have been identified at an international, regional or national level.
- The new Strategic Plan for Tourism in the Caribbean, launching in 2017, recognises and addresses many of the priorities also apparent in Belize.
- The high level national policies for development in Belize give strong recognition to tourism. Through them, the role of the sector in delivering growth and in providing a precious vehicle for converting the country's rich natural and cultural resources into a generator of income is well established. The Growth and Sustainable Development Strategy already presents some specific priorities for tourism that are strongly endorsed by the findings in this report. Further commitment to tourism than this would not be expected in the overarching directional policies for a country.
- More specific policies covering other sectors and themes often point out the implications for tourism. They could be reflected in the revised tourism policy without difficulty.
- Although the current National Tourism Policy from 2005 is outdated and unknown, much of it is still relevant today. A radical change is not necessary. However, the style, balance and some of its content is not right for 2017 and beyond.
- The National Sustainable Tourism Master Plan (NSTMP), while containing much of value that has been put to use, lacks a clear and consistent strategic direction that binds it together. In places it is swamped by the level of detail and elements of the implementation plans may be too prescriptive.
- Tourism in Belize has performed well in the last ten years. Targets for volume of arrivals and for overall expenditure, set in the 2005 Policy and in the NSTMP, have been exceeded. However, the sector appears to have underachieved against two key strategic goals – increasing length of stay and raising levels of spending per head. The country has not moved significantly in the direction of being a higher value destination in this respect. Levels of hotel occupancy have remained quite low and seasonality patterns have stayed largely unchanged. These measures could provide the basis for setting new challenges in the revised policy.
- Forecasts for significant growth in total tourism expenditure, employment and relative contribution to GDP over the next ten years are likely to be met, based on past trends. This underlines the fact that Belize is right to see tourism as a key and vital driver of growth and to give every support to the sector.
- While Belize performs very well in terms of visitor satisfaction with nature and culture, response to the quality of facilities could be better and the relative lack of endorsement of the destination as offering value for money should be a cause of concern.

- There is widespread support for the promotion of Belize as a country that delivers a high quality experience of nature and culture and an acceptance that these assets must be conserved.
- Linked to the above, the need to adhere to the principles of sustainable tourism is frequently quoted and such adherence is sometimes applied explicitly, or at least implicitly, in the articulation of the Belize brand. However, the extent to which these principles are fully understood and put into practice is open to question. In particular, evidence of the delivery of sound environmental management and of awareness of social issues amongst the majority of tourism businesses is lacking. Actions to encourage this are not fully in place.
- The advent of climate change is a major threat to tourism in Belize and the country has made formal commitments to respond to this, with implications for mitigation and adaptation measures within the sector that must be clearly articulated.
- The need to improve the quality of facilities and other aspects of the visitor experience is widely recognised. However, while the coverage of quality standards is being extended, there is widespread concern about lack of compliance and enforcement. This requires greater stakeholder support for the standards, ownership of them and engagement in their delivery.
- Flexibility is required in the approach to markets and to types of product development over time and priorities should be reviewed. This should be informed by improved market research. Opportunities presented by new trends, such as the expanding 'sharing economy', should be taken.
- The impact of cruise tourism remains a key issue that should not be underplayed, while seeking to soften the perceived divide between it and overnight tourism. The sustainable development and management of both should be pursed together.
- More resources are needed for the management of sensitive cultural sites and protected areas, including securing more support for this from tourism income where possible.
- Further investment in tourism should be encouraged, including through the use of incentives, support for SMEs and pursuit of public-private partnerships. The level of investment demanded by the NSTMP requires that a more focused and prioritized approach to investment be given for the sector. This can be achieved in many ways, including through a Tourism Development Trust as proposed by the NSTMP.
- There is a need to further improve the processes of land use planning and development control affecting tourism, with greater clarity, transparency, application and follow up of the outcomes.
- Lack of skilled human resources for tourism is a major issue in Belize, requiring a more coordinated approach to needs assessment and the delivery of well-focussed training.
- Priority should be given to opportunities to improve and expand airlift to Belize and facilitate land border crossings with neighbouring countries.
- Significant opportunities are presented by recent new approaches to tourism planning and development at the local destination level, requiring efficient and inclusive structures for stakeholder engagement. Inclusion of local communities in the tourism value chain, including through cross-sector links, should be encouraged.
- Current arrangements for coordination and delivery of tourism planning, management and development at a national level, including for the implementation of the new tourism policy, may be insufficient and need further consideration.

4.2 Recommendations for the revised tourism policy

The following initial recommendations are made for the development of the revised National Tourism Policy. At this stage, they do not go into detail on possible content, much of which should be apparent from Section 3 of this report and by implication from the conclusions set out above. Rather, they address matters of approach and style.

- The National Tourism Policy 2005 should be completely rewritten. This should not just be an exercise of revising the existing text. However, much of it can be reflected in the new policy.
- The style of the new policy should be clear, accessible, confident, up-beat and challenging. It should be sufficiently short to be readable but have enough substance to be meaningful.
- Tourism stakeholders should be closely engaged with the development of the policy and be kept fully aware of the stages leading to its agreement, launch and delivery. This should help in avoiding the apparent lack of awareness and use of its predecessor.
- A process for regularly reporting on the delivery of the policy should be followed and reflected in the way it is drafted, again with the same aim as the point above.
- The relationship between the revised policy and the NSTMP requires further consideration. Confusion between the two must be avoided. The one must not undermine the authority of the other. However, if the policy is mapped too closely to the NSTMP it is in danger of losing clarity.
- The revised policy should reaffirm the country's decision to embrace sustainable tourism as its development path for tourism. The policy should not contradict, but clarify and strengthen where needed, the overall objective of the NSTMP and address gaps in its logical framework.
- New growth targets for total tourism value/expenditure should be set. Targets relating to length of stay, spend per head and seasonality should be reassessed and implications considered for their delivery.
- The overall objectives for tourism should be very clearly set out, reflecting with confidence on the role of the sector with respect to the vision and aspirations for sustainable development in Belize.
- A set of core principles lying behind the tourism policy should be presented. These should incorporate principles of sustainable and responsible tourism, rather than presenting the latter as somehow separate. They should be described clearly so that they are understandable.
- This must be a policy for all tourism stakeholders, rather than just for the Government of Belize. While this is perhaps already understood, it must be reflected in the way the policy is presented and in the requirement that it places on everyone for its delivery. For example, it should underline the responsibility of all businesses to align with the principles, engage with the actions and encourage others to do so in the interests of the whole sector.
- A key message and theme running through the policy should be the successful articulation and delivery of the Belize tourism brand, centred on nature and culture and imbued with the principles of sustainability.
- While this is a national tourism policy, much of it will be delivered through actions developed and implemented by local destinations and this should be reflected in its style and contents.
- The policy should be all about delivering tourism 'smarter'. This has implications not only for quality and care for the customer and the environment, but also for the processes lying behind tourism planning, development and promotion – more coordinated, more efficient, more

transparent, better informed and more skilled. Innovation and the application of new technology should be strongly encouraged in all areas of tourism development, operations and marketing.

- Clear linkages between tourism and other sectors, such as agriculture and health, should be fostered, in order to strengthen supply chains within Belize and also to add further dimensions to the tourism offer, for example through the development of agro-tourism.
- There should be more emphasis on the collection and use of data and objective evidence and the monitoring end evaluation of actions and outcomes.
- The next step is the development of a draft policy framework. This should include a vision, objectives and guiding principles. It should have a section setting out the strategic direction of tourism in the forthcoming five years. It will then address a set of priority areas. Consideration should be given to the 15 policy areas[9] set out in Section 3 of this report and whether and how they might be structured into a coherent framework.

[9] Although there are 16 sub-sections, the first of these would be reflected in the strategic direction

Annex 1: Initial consultations

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Minister of Tourism: Manuel Heredia

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Belize Tour Guides Association: Edmund Williams

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