

# BELIZE'S MUSIC TOURISM STRATEGY FINDINGS



# Strategy Overview

- ❑ Commenced in Q4 2022
- ❑ Consultant Group: Sound Diplomacy
- ❑ Methodology: Research and Stakeholder Engagement
- ❑ Tools: Belize Music Ecosystem Economic Assessment; SWOT Analysis
- ❑ Action Plan Focus Areas:
  - ❑ Music tourism development
  - ❑ Music production
  - ❑ Supporting artists and SME's
  - ❑ Fostering live music and festivals



# SOUND DIPLOMACY

# Objectives

## ❑ **Boost economic development**

- ❑ Intentional strategy and policy implementation
- ❑ Investment attraction
- ❑ Sustainable job creation.

## ❑ **Increase and diversify tourism spend through more events,**

- ❑ More engagement
- ❑ A wider, more robust offer for regional and international tourists
- ❑ All year around.

## ❑ **Strengthen assets by delivering the infrastructure requirements to develop Belize's music ecosystem**

- ❑ Specifically focus on music production
- ❑ Attract global music writers and artists to record & produce in Belize
- ❑ Identify how to reinforce traditional music in Belize.

## ❑ **Grow the music economy using data and evidence to support all local artists better**

- ❑ Expand IP development
- ❑ Music business as a whole.

## ❑ **International recognition**

- ❑ Further developing Belize into a global music destination with Punta Rock et. Al. as a globally recognized music genre

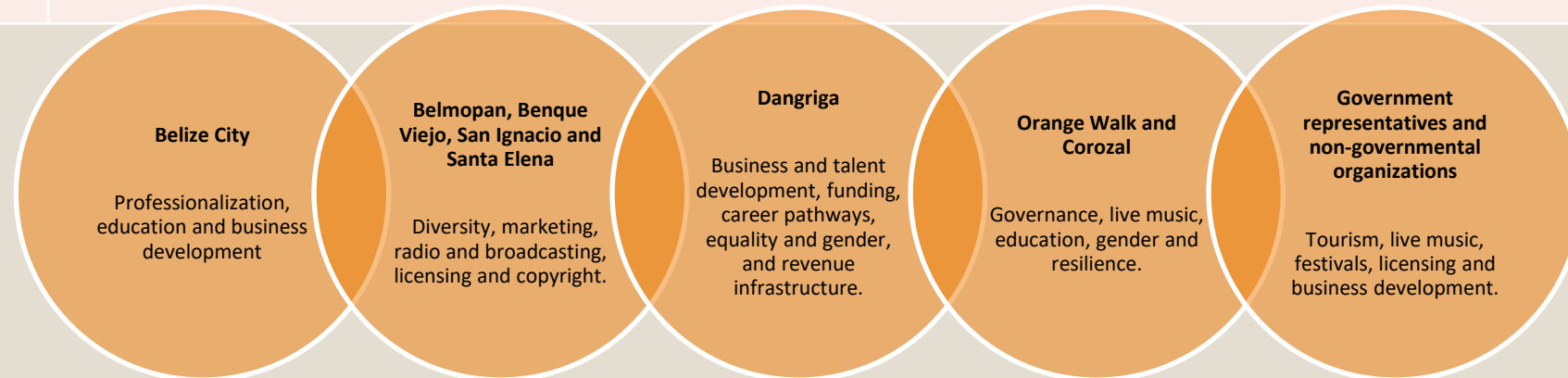
# Methodology

**Research:** 1. official secondary data; 2. Primary research; 3. Data projection; 4. sectoral mapping; 5. Estimation techniques to assess the economic impact of Belize's music ecosystem

*Table 6. List of Main Data Sources*

DATA SOURCE	DETAILS
Business Establishment Survey 2016	This source provides data on the number of employees and the average output per establishment, and the distribution of the size of the establishments according to their economic activity.
Labour Force Survey Report Sept 2021	This source provides data on the number of employees per industry according to the BCEA.
Sound Diplomacy Mapping Dataset	This mapping dataset enables us to identify missing data points.

## Stakeholder Roundtables



# Belize Music Ecosystem Economic Assessment

## Defining the Music Ecosystem



# Belize Music Ecosystem Economic Assessment

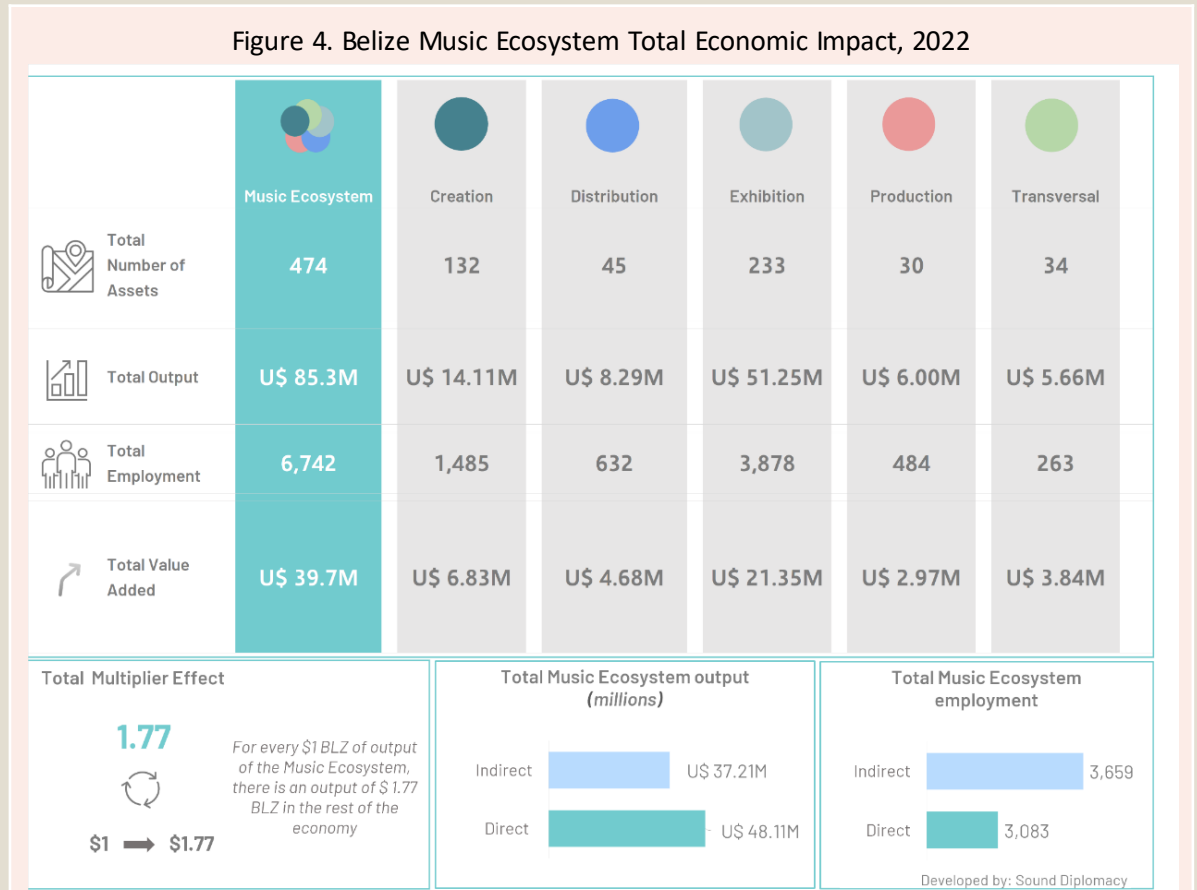
Table 2. Belize Music Ecosystem Economic Impact 2022

TYPE OF IMPACT	EMPLOYMENT (NUMBER OF JOBS)	OUTPUT (BZD\$ '000,000)	GROSS VALUE ADDED (BZD\$ '000,000)
Direct	3,083	48.1	26.3
Indirect	3,659	37.2	13.4
Total Impact	6,742	85.3	39.7

\*Generated and supported a total of **6,742 jobs (3.87% of national employment)**.

\*\*Total output generated was **BZD\$85.3 million** and a total **Gross Value Added of BZD\$39.7 million**.

Figure 4. Belize Music Ecosystem Total Economic Impact, 2022



Source: Business Establishment Survey, Sound Diplomacy Research

# SWOT Analysis

## Strengths

- ❑ A diverse melting pot of people and cultures.
- ❑ Unique musical styles: Punta, Paranda, Brukdown, Samba, etc.
- ❑ Growth in the past 20 years with better production quality and talent.
- ❑ Collaboration among music creators easy due to the small size of the music ecosystem.
- ❑ Renewed government has made efforts to invest in music and culture: new initiatives like music studios and the BIMFF.
- ❑ The Belize Tourism Board (BTB) platforms present a great opportunity to market as an ambassador for Belizean music.
- ❑ Government institutions like the NICH are in place to preserve the Music Industry
- ❑ Private organizations like the Association of Belize (MIAB), the Belize Music Agency (BMA), and the Belize Arts Foundation (BAF) support and protect the music sector in Belize.
- ❑ Belize has 27 recording studios and rehearsal rooms, making studio access easier and more affordable.
- ❑ Music is a strong economic driver: generated \$85.3 million in output and contributed a total Gross Value Added of \$39.7 million (2022)
- ❑ The music businesses directly contributed \$48.1 million and supported 3,083 jobs (2022)
- ❑ The music ecosystem's total employment accounted for 1.77% of all employees in Belize (2022)
- ❑ The multiplier effect of Belize's music ecosystem is 1.773, generating additional output of \$773 for every \$1,000 generated.

# SWOT Analysis

## Weaknesses

- ❑ Belize lacks a formal music industry; perceived as not taken seriously by the government and business community.
- ❑ Music is not considered a significant part of the national identity, with a perception that people are more willing to spend on foreign artists than local ones.
- ❑ There have been no notable efforts to create a Belizean musical product that can be marketed worldwide, and non-Belizean music is prioritized in tourist areas.
- ❑ Lack of communication and collaboration exists among private and public sector
- ❑ Music infrastructure is lacking, and there is no industry structure or career pathway for musicians.
- ❑ Most musicians have day jobs as it is difficult to earn a sustainable living from music alone.
- ❑ Music business professionals and technicians are scarce due to the absence of training opportunities.
- ❑ Artists often avoid paying taxes, leading to limited recognition and inability to access grants or earn revenue from activities like streaming.
- ❑ Lack of data on music-related tourism and the contribution of the music sector to the national economy.
- ❑ Music events are scarce, causing artists to undersell themselves, and there are no fair pay guidelines.
- ❑ Copyright protection is rarely enforced, resulting in revenue loss and music piracy issues.
- ❑ Music education is limited to private academies, and professional development opportunities for musicians are few.
- ❑ There is no national music program in schools and a lack of information on existing opportunities for music education and development.

# SWOT Analysis

## Weaknesses

- ❑ Belize lacks a music hub, talent development opportunities, and formal networking platforms.
- ❑ Government funding for music creators is minimal, and getting songs played on the radio can be challenging.
- ❑ There are few programs that protect and promote heritage music, and the industry is male-dominated with issues of gender equality and pay disparity.
- ❑ Live music-dedicated venues are non-existent, and there is no unified festival management committee or promoter association.

# SWOT Analysis

## Opportunities

- ❑ Belizean artists are gaining international attention: opportunity for music export and revenue generation in Central American, Caribbean, and international markets.
- ❑ Building relationships with the Belizean diaspora can offer opportunities for exporting and touring.
- ❑ External funding opportunities, such as the Cultural and Creative Industries Innovation Fund (CIIF) and the U.S. Ambassadors Fund for Cultural Preservation (AFCP), are available to support the Belize creative sector.
- ❑ Belize is a member state of the Organization of American States (OAS) and the Caribbean Community and Common Market (CARICOM).
- ❑ Close proximity to Mexico, where major music labels have offices, provides potential advantages.
- ❑ English being the official language of Belize makes it appealing to North American and international travelers.

# SWOT Analysis

## Threats

- ❑ Belize has a small domestic music market due to its small population.
- ❑ Geographically close to countries with thriving music tourism industries, such as Jamaica and Cuba.
- ❑ Internet usage in Belize is relatively low, with 62% of the population using the internet in 2021.
- ❑ Belize does not have a dedicated cultural ministry but includes culture within the Ministry of Education, Culture, Science, and Technology (MoECST).
- ❑ Some musicians feel the need to leave the country to pursue a full-time music career in more established music scenes.
- ❑ Concerns are raised about the lack of coordination in the national cultural events calendar, leading to conflicts and difficulty in planning for producers and artists.
- ❑ Local artists may find it easier to get booked/played on international radio stations.

# Recommendations: Action Plan

## Music Tourism

- A.1. Run A Music Tourism Marketing Campaign That Promotes And Celebrates Belize As A Music Destination
- A.2. Develop Punta Rock “**or Belizean Beat**” into an internationally recognized musical style and music tourism asset
- A.3. Explore incentives for hotels and resorts to play Belizean music and hire local artists

## Music Production

- A.4. Advocate for better music education and training
- A.5. Support BSCAP’s efforts **and other copyright systems**

## Supporting Artists & SME’s

- A.6. Create a music hub
- A.7. Establish a music board
- A.8. Ensure the inclusion of women in the music industry
- A.9. Advocate for music-specific government funding

## Live Music & Festivals

- A.10. Encourage busking and street performance in tourist areas
- A.11. Create a festival committee and a calendar of events to encourage festival tourism

# BTB Actions

Belize Music Project

Market Study targeting Restaurants and Hotels for Willingness to Pay/Sell

Music Summer Program

Creative Space Enhancement

Promo Price at Reef Studio for Women

Informative Session with Strategic Agencies

Orange Economy Tourism Trust Fund

Performances at Creative Spaces

More initiatives from BTB's Cultural & Community Outreach Desk

# Strategy Recommendations

- A2. Develop a Globally recognized Belizean Music Beat

- A.3. Explore incentives for hotels and resorts to play Belizean music and hire local artists.

- A.4. Advocate for better music education and training

- A.6. Create a music hub

- A.8. Ensure the inclusion of women in the music industry

- A.7. Establish a music board

- A.9. Advocate for music-specific government funding

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- A.10 Encourage busking and street performance in tourist areas

- A.11. Create a calendar of events to encourage festival tourism

# Mid Term Outlook (FY 2025+)

- A.1. Run A Music Tourism Marketing Campaign That Promotes And Celebrates Belize As A Music Destination
- A.2. Develop Punta rock or the “Belizean Beat” into an internationally recognized musical style and music tourism asset.
- A.4. Support song writers and musician based initiatives
- A.4. Help Musicians to monetize (put the right price) to their product/service, including proper Management for formalization
- A.5. Support Copyright efforts for artists
- A.11. Establish a festival committee/evaluation criteria to expand calendar of events to encourage festival tourism >> Cross Agency support/GOB added funding



# COLLOABORATION

LET'S HEAR FROM OUR PARTNERS!

NICH

Help Strengthen a Joint Effort!



COLLABORATION

LET'S HEAR FROM YOU!

Help Strengthen a Joint Effort!

Rank the recommended actions in order of impact, urgency and value (Scale-1- Low, 2-Medium, 3- High)

Recommended Actions	Impact (Scale 1 to 3)	Relevance (Scale 1 to 3)	Urgency (Scale 1 to 3)	Additional Comments
A.1. Run A Music Tourism Marketing Campaign That Promotes And Celebrates Belize As A Music Destination				
A.2. Develop Punta Rock “or Belizean Beat” into an internationally recognized musical style and music tourism asset				
A.3. Explore incentives for hotels and resorts to play Belizean music and hire local artists				
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# COLLOABORATION

Help Strengthen our Joint Effort!