

BELIZE

Dangriga

Austin Rodriguez
Drum Shop

Pen Cayetano
Studiogallery

Ruthie's Cab

Gulisi Garifuna
Museum

Tuani Garifuna



Garifuna Trail

COMPETE CARIBBEAN

Belize Cultural
Adventure Travel ...

Herbal Healers
Tea Bar

Maxim's Bar &
Grill

Hopkins

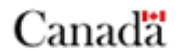


Communicating Change through Belongship



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*CLUSTER
DEVELOPMENT
PLAN, BELIZE*

*SOUTHERN-EASTERN BELIZE
GARIFUNA CULTURAL TOURISM
TRAIL: DANRIGA & HOPKINS,
BELIZE*



Canada

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ACRONYMS

BTB	Belize Tourism Board
BTIA	Belize Tourism Industry Association
BZD	Belize Dollars
CARICOM	Caribbean Community
CAGR	Compound Annual Growth Rate
CBT	Community-Based Tourism
CCPF	Caribbean Cluster Partnership Facility
CDB	Caribbean Development Bank
CDP	Cluster Development Plan
CDP	Cluster Development Plan
DFID	United Kingdom's Department for International Development
GOB	Government of Belize
HLBA	Hopkins Local Business Association
IADB/IDB	InterAmerican Development Bank
IFI	International Funding Institutions
ILO	International Labor Organization
IP	Investment Panel
LAC	Latin America and The Caribbean
MOH	Ministry of Health (Belize)
MOT	Ministry of Tourism and Diaspora Relations (Belize)
MTCA	Ministry of Tourism & Civil Aviation (Belize)
MSME	Micro, Small & Medium Enterprises
NGO	Non-Government Organizations
PGIA	Phillip Goldson International Airport
SIB	Social Investment Fund
TA	Technical Assistance
UNESCO	The United Nations Educational, Scientific and Cultural Organization
UNWTO	United Nations World Tourism Organization
US	United States
USD	United States Dollar
VEMS	Visitor Expenditure, Motivation & Satisfaction (VEMS) Survey
WOF	Women-Owned Firm

EXECUTIVE SUMMARY

Declared a “Masterpiece of the Oral and Intangible Heritage of Humanity” by UNESCO in 2001, the Garifuna culture is well-known for its rich, vibrant music, food, dance, and language. However, the Garifuna’s history and stories are profoundly thoughtful, which penetrate across cultures and geographic borders, showing us that we are one global community, one family.

The actions presented within this cluster development plan (CDP) seek sustainable tourism development to highlight and share an authentic indigenous culture in Dangriga and Hopkins's Garifuna communities. These actions will directly impact the 47 private enterprises directly involved in the cluster and their families. This includes services and experiences inclusive of adventure, homestays, immersions—arts & craft, music, festivals, professional services, traditional holistic healing, and more. It is expected to indirectly reach the ~11,100 inhabitants within the Dangriga and Hopkins communities through the economic growth driven by exposure to indigenous culinary and experiential community based cultural tourism products, capturing a wide array of Garifuna rooted products spurring entrepreneurship activity and development.

The Cluster Development Plan is programmed for over three years, with three major components.

1. Component 1 comprises the internal foundational improvement of cluster members in the form of Institutional Strengthening and Capacity Building of the Cluster Members to become more competitive by improving quality and expanding the volume of relevant services offered.
2. Component 2 comprises of the Marketing and Communications outreach tools and efforts to drive tourism inclusive of the development of a comprehensive marketing and communications strategy, action plan, and budget; capturing the creative digital resources and production of useful marketing materials that highlight the warmth, soul, and integrity of the Garifuna people; and the development and launch of a centralized website, interactive app, and marketing campaign.
3. Component 3 comprises the project management component to oversee the implementation of CDP activities and infrastructural development through signage and improvement of cluster member assets.

Components 1 and 2 are critical and equally important for developing cluster members and their CBT product/service offerings. Component 1 seeks to develop the cluster management capacity and product offering from an internal perspective. In contrast, Component 2 aims to build their capacity to present their CBT products comprehensively to tourists seeking CBT communities and experiences.

At the end of the two years, this CDP and its activities are approached with the sustainability of actions as their cornerstone, ensuring meaningful transformation through capacity building and business development/mentorship, and targeted outreach to drive economic development in the target communities, and improving the lives and livelihoods of both cluster members and the broader communities. It is expected to further indirectly reach the ~11,100 inhabitants within the Dangriga and Hopkins communities through the economic growth driven by exposure to indigenous culinary and experiential community based cultural tourism products, capturing a wide array of Garifuna rooted products. Using a ToT methodology, these communities can mentor and help each other grow beyond the project's scope with a committed Government and stable Business Associations. This project also supports preserving this dying culture since many are forced to seek work beyond the traditional means of livelihood in this impoverished district. The stakeholders' excitement and commitment at this juncture is an impetus for this project to be considered, especially since it will contribute positively to the countries' achievement of the MDG and SDGs.

SECTION I: INTRODUCTION

1.1. CONTACT INFORMATION

Title of cluster project:	Belize Garifuna Cultural Tourism Trail
Name of lead firm or institution:	Ministry of Tourism & Diaspora Relations
Country:	Belize
Name of main contact:	Mr. Abil Castaneda, Chief Tourism Officer
Title (current position):	Chief Tourism Officer
Preferred phone number:	+501.227.2801/02
Email:	abil.castaneda@tourism.gov.bz

Abstract: Declared a “Masterpiece of the Oral and Intangible Heritage of Humanity” by UNESCO in 2001, the Garifuna culture is well-known for its rich, vibrant music, food, dance, and language. However, the Garifuna’s history and stories are profoundly thoughtful, which penetrate across cultures and geographic borders, showing us that we are one global community, one family. The actions presented within this proposal seek, through sustainable tourism development, to highlight and share an authentic indigenous culture in the Garifuna communities of Dangriga and Hopkins. These actions will directly impact the 47 private enterprises and their families and are expected to indirectly reach the ~11,100 inhabitants within the Dangriga and Hopkins communities through the growth and exposure to culinary, experiential tourism products, capturing a wide array of Garifuna rooted products. This also includes services, experiences inclusive of adventure, homestays, immersions. Arts & craft, accommodations, music, festivals, professional services, traditional holistic healing, and more.

1.2. STANDARD INFORMATION TO INCLUDE ON THE FIRST PAGE

The Inter-American Development Bank (IDB), the United Kingdom’s Department for International Development (DFID), the Caribbean Development Bank (CDB), and the Government of Canada have established a The co-financing facility is called “The Compete Caribbean Partnership Facility,” a continuation of the Compete Caribbean Program that funded over 100 private sector development projects in the Caribbean from 2010-2016. These projects generated nearly 12,000 jobs, a 23% increase in exports (USD 37M), and a 41% increase in the revenue of participating firms and clusters (USD 153M), as well as an improvement in the business climate for some countries through policy or regulatory reforms. The Compete Caribbean Partnership Facility (CCPF) aims to drive inclusive and sustainable economic growth through greater competitiveness and innovation in the private sector. More specifically, the CCPF supports 13 beneficiary countriesⁱ to achieve the following objectives:

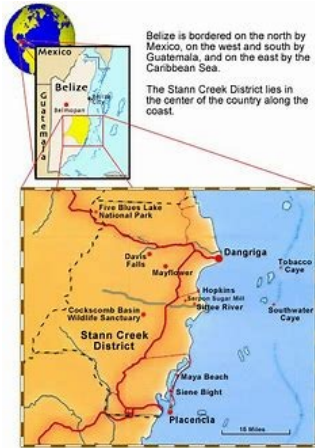
- i. Increase revenues of firms, particularly women-owned firms (WoF)ⁱⁱ
- ii. Increase employment, particularly for women and vulnerable groups.
- iii. Generate exports and foreign exchange

In January 2020, the CCPF launched a call for proposals for clusters focused on the tourism and Agri/agro-tourism sectors. To support this process, to provide tools to build a pipeline of strong projects, community-based tourism (CBT) toolkitⁱⁱⁱ was developed in collaboration with the Caribbean Tourism Organization (CTO). The toolkit includes primary market research of US-based consumers to assess the demand for innovative products and services that can be offered in the Caribbean and visitor willingness to pay for these experiences. Additionally, the toolkit includes a Community-Based Tourism (CBT) Enterprise Handbook, Cluster Diagnostic Tool, and a Tourism Assets Inventory and Profile Template, which cluster stakeholders can use to develop and/or enhance their tourism products and experiences. The purpose of the CDP is to create a strategic direction for the cluster and reach a consensus on the priorities that address the challenges and opportunities for inclusive and sustainable economic

growth. This document and its annexes are also used as a funding proposal for technical assistance grants. An independent Investment Panel (IP) will evaluate each CDP submitted to identify the projects most suitable for Compete Caribbean funding.

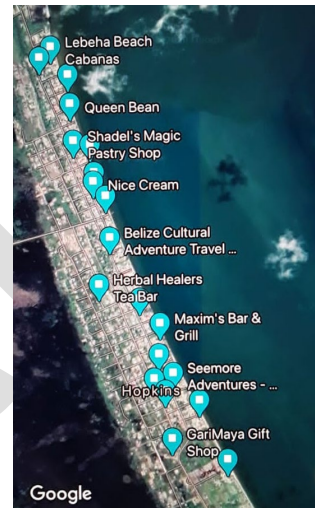
SECTION II: CONTEXT

2.1. THE DESTINATION – OVERVIEW OF THE TOURISM PRODUCT



South-Eastern Belize is among the country's most culturally and geographically diverse melting pot where travelers will find a rich indigenous Garifuna culture, history, and culinary delights. The destination focuses on two largely-Garifuna coastal communities of Dangriga town (population 9,600) and Hopkins village (population 1,500). When experienced through the lens of tourism, the rich, dynamic, and diverse indigenous cultural tourism experience provide much needed holistic empowerment to these Garifuna communities. The peripheral traditional eco- and adventure- experience spans from marine to terrestrial charms inclusive of the southern cayes and

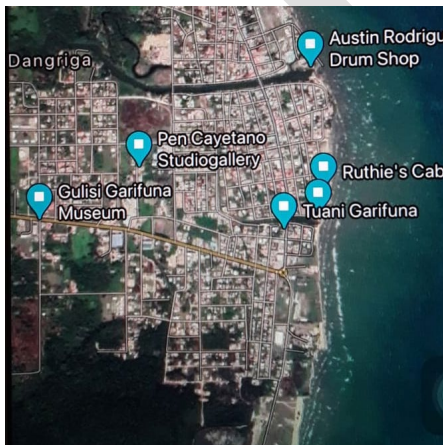
terrestrial reserves that have long been traditional playing ground for the Garifuna People.



2.1.1. LOCATION & MEANS OF ACCESS

The Belize Tourism Board (BTB) classifies “overnight tourist arrivals” as international

visitors who spend more than one night in the country. In 2019, 76% of these overnight tourist arrivals arrived via the Phillip Goldson International Airport (PGIA) 70 miles away^{iv}. Transportation options on land range from public bus transportation to private shuttles and charters, which may require two and a half hours or up to a half days’ travel. Dangriga has a domestic airport. Many visitors will also arrive via shuttle service provided by the hotel of choice. Two local airlines fly into Dangriga several times a day from either the PGIA or the Municipal airport in Belize City. Moving around within these Garifuna communities is easily facilitated by indigenously owned tour/transportation companies who follow COVID-19 Gold Standard protocols established by the Belize Tourism Board.



The Town of Dangriga Longitude 16.959524,
Latitude: 88.220843

2.1.2. COMPARATIVE ADVANTAGE & KEY ATTRACTIONS

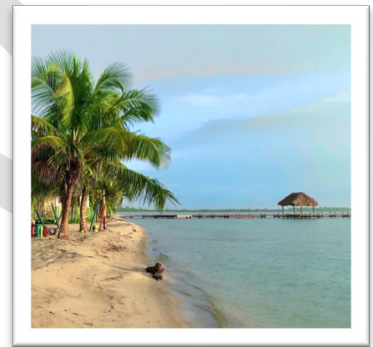
For locals and international visitors alike, southern Belize is a gem for those who seek to experience both nature and adventure, culture/history, terrestrial and marine experiences – all in a tightly compacted unique geographic space. It is a melting pot of rich culture, cuisine, and the warm, welcoming nature of the people themselves. By spending a meaningful amount of time in these communities, travelers can experience the richness of the culture and the people's warm, easy-going nature while learning of this vibrant community's struggles and success. These communities, therefore, offer a unique opportunity for travelers to

experience an authentic indigenous community, culture, and cuisine, all while having easy access to Belize's natural terrestrial and marine wonders in addition to various cultural festivals and competitions that celebrate cultural figures and the unique richness of the Garifuna Culture.



Dangriga, the largest town in Southern Belize, is considered both the spiritual capital of the country's Garifuna people and the Culture Capital of Belize, with excellent tourism potential. This unapologetically authentic and vibrant town is the birthplace of 'Punta Rock' -a fusion of acoustic Garifuna and electric instruments - a true 'diamond in the rough.' This charming town is home to cultural figures such as the world-renown artist and musician Pen Cayetano, Garifuna doll maker Mercy Sabal, the famous and eldest Garifuna drum maker, Austin Rodriguez, and home to Garifuna owned and operated enterprises such as Tuani Garifuna restaurant and Sabals Cassava farm and factory.

Hopkins, traditionally an indigenous-Garifuna fishing village, stretches approximately 1.5 miles along the coast. It has a unique Garifuna-cultural charm with scenic beaches that attract travelers looking for an off-the-path destination from large crowds seeking authentic local culture and cuisine with sandy beaches. The low population density of Hopkins provides the added benefit of adequate physical distancing necessary while traveling during Covid-19. This project intends to present the communities as a significant, traditional indigenous cultural tourism destination for international and local tourists. This pro



2.1.3. KEY INDIGENOUS ATTRACTIONS

Key indigenous attractions in the immediate area include the Pen Cayetano Studio and Art Gallery, the Gulisi Garifuna Museum, Alejo Beni Park, Palmento Grove Garifuna Eco-Cultural Fishing Lodge / Institute located on Kalipuna Island, the Lebeha Drumming School, and Why Not Island, among other culinary attractions include Tuani Garifuna Cultural food, Herbal Healers for natural holistic teas and remedies, or Sabal's Cassava Food Products' Factory, the latter being one of the only formalized cassava processing plants in the area.

Monuments are located throughout Dangriga Town, such as the Drums of Our Fathers Monument, the Hayawadina Wayúnagu Mural, the Thomas Vincent Ramos Monument, among many others, a scrapbooker or facebookers selfie paradise. Festivals include the Belize International Paranda Folk Art and Music Festival in Hopkins held during Easter weekend each year in Hopkins; the 19th of November Celebrations, which highlight the arrival of the Garinagu in Belize; and the Wanaragua Festival held during Christmas and New Year where visitors may experience masked and costumed dancers parading in the streets performing the Chárikánári (cow dance) and the Wanaragua or Jankunu dance.

Other areas of interest at the periphery of the communities include The Maya Adventures, Maya Center, Marie Sharp Fine Foods (world-renowned Hot Sauce Factory which pepper in US and Asian grocery stores)), the Mayflower Bocawina National Park, the Sittee River, the Cockscomb Basin reserve, the Belize Sugar Mill, Maya King Falls Adventure Tours, various Citrus farms, and the Citrus Producers of Belize (CPBL). Marine attractions are vast off these communities' coast for those who love to dive, snorkel, fish, swim, or laze on a beach: These include Tobacco Caye, South Water Caye Marine Reserve (the largest marine reserve offshore), and many other marine

options. Further information on these communities' attractions is included in the annexes. Many opportunities exist for collaboration and itineraries utilizing several participants in a day or extended itineraries.

2.2. THE DEMAND – MARKET POTENTIAL

2.2.1. GLOBAL DEMAND FOR CBT EXPERIENCES

Travel and tourism have been among the fastest-growing economic sectors globally, having been one of the primary income sources for developing countries such as Belize. Annually, the tourism sector generates approximately USD 524 billion in tourism revenue, contributing to 37% of Belize’s gross domestic product (GDP). Tourism employs 65,000 people, which equates to 39% of total jobs within the country.

As of 2020, however, this sector has been among the most severely impacted by COVID-19 and the effects of climate change, as is the case for most countries globally, leading to a global economic and financial crisis. The World Tourism Barometer shows that, compared to 2019, international tourist arrivals dropped by 70% from January to August; this translates to a decrease of 700 million international arrivals.

Experience-driven travel, focusing on local experiences, authenticity, well-being, community, and engagement, is a trend that has been rising in recent years, which was estimated to grow to \$183 billion annually by 2020. Travelers are now beginning to seek a deeper connection with nature and culture, experience more personal growth, and forge meaningful or lasting transformations in their lives. These transformational experiences are the latest trend in the adventure, luxury, millennial, and wellness travel segments, for which 54% of travelers attached considerable importance^v.

A shift is occurring in the luxury travel segments and moving beyond experiential travel to conscious travel. More travelers focus on human and women's rights, sustainability, and giving back to communities. Luxury operators are striving for community and connectivity.^{vi}

The Covid-19 pandemic, despite its vast adverse effects on the economies of the world, is also having a positive impact, making people think about how they can travel more consciously. According to National Geographic, there is a renewed commitment among travelers to sustainable tourism and prioritizing a healthy world over profits. Small communities play a more significant role in that travelers seek quality over quantity, and traveling with intention is more important^{vii}.

2.2.2. THE BELIZE TOURISM MARKET

PRE-COVID VISITORS

Tourism industry activity contributes to ~37% of Belize’s GDP, directly employing ~65,000 persons per year or 39% of all employment.

Country/Region	Direct GDP Contribution	Tourism GDP Growth	Employment Jobs (000s)*	Employment % Total Jobs	Visitor Spend US millions*	Visitor Spend % of Exports	Spending by Purpose	Spending by Market
Belize	37.2%	5.0%	64.8	38.7%	\$524.0	48%	Leisure: 88% Business: 12%	Int'l: 87% Domestic: 13%
Caribbean	13.9%	3.4%	2.8 MN	15.2	35.7 BN	20.0%	Leisure: 88% Business: 12%	Int'l: 87% Domestic: 13%

Note: Overall region employment given in millions and visitor spend in billions
Sources: World Travel and Tourism Council (WTTC). Economic Impact Reports. 2019. <https://wttc.org/Research/Economic-Impact>

Economic Impact of Tourism (2019)

The Visitor Expenditure and Satisfaction (VEMS) Survey^{viii} was officially launched in 2019, led by the Statistical Institute of Belize (SIB) on behalf of the BTB and the Central Bank of Belize. The VEMS was designed to capture detailed demographic information of overnight visitors, where they stayed while in Belize, their length of stay,

spending profiles, and satisfaction ratings. The 2019 VEMS data reveals that 28% of those who visited Belize in 2019 had traveled to Belize before. Most visitors (89%) would recommend Belize to family or friends, and 84% would return. There were notable positive satisfaction ratings on border entry services (immigration/customs), accommodation, local transportation, marine attractions, tours, and restaurant services. Belize was rated poorly, relative to the above areas, in Entertainment & Nightlife, Cleanliness of the Environment, and Mainland Attractions.

On average, 46% of all visitors to Belize get their information for their trip to Belize from friends and family, a valuable marketing consideration for driving sustainable revenues. 26% get their trip information from websites and other online sources, while only 8% get their info via social media. The largest geographic segment of visitors to Belize was from the United States (U.S.), which accounted for approx. 68% of overnight arrivals, where travel for leisure was the most common purpose of travel to Belize (85%) across all geographic markets. 80% of visitors were between the ages of 25-64, with the highest concentration of visitors (22%) between the ages of 25 and 34. 82% travel to Belize for leisure. Top destinations for American visitors while on their trip to Belize in 2019 include Ambergris Caye (43%^{ix}), Caye Caulker (21%), and San Ignacio (15%), while 8% visited Hopkins while on their trip. 66% stayed at a hotel/resort, and 13% at rented Living Spaces^x. Their average daily expenditure is \$180.75, which is greater than the daily average for all geographic markets.

20% of visitors traveled to Belize on a pre-paid package booked through travel agencies/tour operators (29%) or via a website (48.2%). Those who traveled to Belize on a pre-paid package spent 17% more than those who did not. Other major markets are Europe, Latin America, Canada, which account for approximately 29% of overnight visitors to Belize in 2019.

With the addition of low-cost air carriers to Belize in 2017, Belize has since become a more accessible destination to overnight visitors^{xi} from a more modest income bracket of those on a budget. In 2019 the total number of overnight visitors to Belize surpassed 500,000. During this period, first-time visitors represented 72% of total overnight visitors to Belize, while repeat visitors represented 28% of total overnight visitors. Finally, because of the Covid-19 pandemic, Belize’s tourism sector stalled, and tourism income was non-existent for several months during the second and third quarters of 2020. This placed many tourism-related jobs and entities and caused a high level of unemployment in the sector.

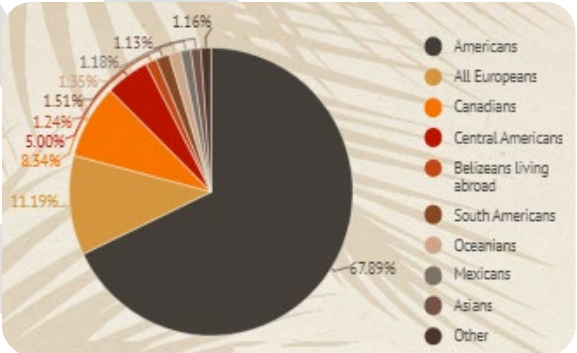


Figure 1 - Overnight Tourism Arrivals by Origin

Assuming a gradual lifting of travel restrictions, the availability of a widely available Covid-19 vaccine or treatment, control of this new aggressive strain, and a commensurate return of traveler confidence, a global recovery to 2019 levels tourist arrivals is likely not to occur before 2023^{xii}. While the recommitment of airlines incoming to Belize is occurring, cautiously as demand is still low across the region, the Ministry of Tourism concurrently projects that Belize's tourism activity is expected to return pre-Covid-19 levels until 2023. Destinations with comparable or substitute tourism offerings around the world will therefore be competing for international tourism revenue.

Year	Tourism Activity as a % of Pre-Covid-19 Levels
2020	10-30%
2021-2022	50% to 70%
2022-2023	90+%

Overnight visitors traveling on business spend the most, in relation to other markets, on accommodation, food & beverage, shopping, and entertainment. The VEMS Survey found that business visitors tend to stay at higher-tiered accommodations and were likely to have commensurately priced dining options. Therefore, business visitors are also more likely to desire to leverage their non-work time on entertainment options for the duration of their trip while in-country. This phenomenon was found to be accurate, especially for visitors from the Caribbean who had the highest average expenditure per day, as they were found to be primarily business travelers. Visitors traveling for wedding/honeymoon purposes spend a higher daily average on accommodations – though less than those traveling for business. United States visitors spend the most on local transportation. Further details on daily spend are presented within the annexes to this document.

2.2.3. LOCAL DATA (DANGRIGA & HOPKINS)

The Southeast Coast is one of the top three overnight destinations in the country. This tourism growth has stimulated an increase in employment: in 2016, 3,996 people were employed within the tourism industry, while 4,288 persons were employed in 2017, an 8.1% increase^{xiii}, while nationally, 20,722 people were employed in the tourism industry, accounting for 21% of total employment at that time.

The occupancy rates in the Stann Creek District were 34.5% in 2019^{xiv}. The average expenditure per day for travelers staying in the Stann Creek District was \$161 per day. Those staying in Hopkins was \$171 per day, the latter being approximately 6% more than the district average. The average length of stay (nights) for all visitors is 6.1 nights, which is 30% longer in the Stann Creek District than in other geographic areas within Belize^{xv}. This is important to consider in the cluster partnership's marketing efforts to keep higher-paying travelers within the Stann Creek District for longer with cluster itineraries to keep them entertained.

Tour operators play an essential role in the packaging, distribution, and sales of tourism products. They function as intermediaries between suppliers and consumers. Tour operators are, therefore, critical strategic partners for tourism development. As of 2017, there were twelve (12) BTB registered tour operators from Dangriga. These inbound tour operators offer a variety of marine and terrestrial tours, as shown in Table 13. In a review of the tour operators' websites, it was observed that five (5) operators provide only terrestrial tour offerings, four (4) give only marine tour offerings.

In contrast, three (3) provide a combination of terrestrial and marine tour offerings. Several of the operators, while registered, appear to subcontract tours to other tour operators and guides that conduct the tours. During this period, of the 147 licensed Stann Creek tour guides, 38% were from Hopkins, while 8% resided in Dangriga.

For the marine offerings, famous dive and snorkeling sites offshore Dangriga is used, some of which connect to the Belize Barrier Reef (which is the largest living barrier reef in this hemisphere and a Unesco protected site), and others are located around small island resorts. In terms of the terrestrial tours, popular sites used are Mayflower Bocawina National Park and Cockscomb Basin Wildlife Sanctuary, which are within proximity to Dangriga. However, other archaeological sites and caving^{xvi} experiences may be enjoyed in nearby districts, which can be accessed when using Dangriga or Hopkins as a home base.

Although Dangriga is not a traditional tourism destination, with the direct and indirect impact from this project's activities, it is poised to become a tourism destination for Belizeans as a potential weekend destination. It has access to infrastructure via the Hummingbird highway and to-be-paved Coastal highway. It is the administrative center of the Stann Creek district. Dangriga has an extensive undeveloped beachfront near the town pier; serves as a riverside hub for boats to the islands and other marine experiences. Investments in these areas are required. However, it can be a haven for outdoor health and wellness with sufficient space and spaces for physically

distancing following the effects of the Covid-19 pandemic. From Belize City and San Ignacio, Dangriga is just a 2-hour drive away and only a 1-hour drive from Belize's Capital City of Belmopan. An increase in Belizeans spending the day in these destinations would indefinitely add to the cultural immersion for international travelers. – As a part of Component 1, the consultant (team) would be responsible for compiling various half-day, full-day, week-long, and multi-week itineraries to support and showcase tourism offerings applicable to the domestic and international markets.

2.2.4. KEY CBT MARKET SEGMENTS FOR DANGRIGA AND HOPKINS

There is a growing demand for tourism experiences delivered or based in local communities. A 2019 Euromonitor market study of US consumers conducted for Compete Caribbean found that 29% were familiar with CBT; however, 79% said they were willing to try it once they became aware. Given that there were approximately 30 million visitors to the Caribbean in 2018, a potential market of 23 million exists for Caribbean CBT experiences^{xvii}.

The study prioritized and gathered information on 15 different types of CBT experiences within the Caribbean region – including value propositions, tourist profiles, and visitors' willingness to pay for experiences. It identified two key CBT tourist profiles for the US market:

- **'Caribbean Explorers'**, those who have traveled to the Caribbean for leisure, seek affordable, relaxing, authentic, and unique experiences during their Caribbean travels.
- **'CBT Connoisseurs'**, those who have traveled abroad and done CBT, are interested in an enjoyable blend of adventure and affordable immersive local and educational experiences to complement their 'beach tourism' activities.

The study revealed that local crime, water, and food safety are potential deal-breakers and have become even more critical within the Covid-19 context. Therefore, it would be vital to inform customers about safety and hygiene safeguards and protocols, licenses, and certifications to show standards are met. Chemical-free and organically grown foods are a priority for travelers and a sense of philanthropy. They value experiences where their participation provides benefits to the local community. A robust online presence to communicate these concerns and showcase CBT experiences is critical in communicating with potential customers that fit within these tourist profiles.

Of the 15 CBT experiences tested by Euromonitor, the following represent the market segments with the most potential for this cluster development in Dangriga and Hopkins, relevance, and tourists' willingness to pay.

(I) LOCAL TOURISM:

Involves activities that offer experiences linked to the local/host community, including multiple activities across various tourism niches and categories, intending to provide an authentic and local experience. Experiences may be packaged to include transportation, accommodation, meals, a guide, et al. Generally, demand for this product are couples who seek immersive and local experiences combining different activities who are willing to pay as much as US\$300 per activity. Tourists are willing to pay for VIP options if they know a percentage of their ticket price goes to the community and if transportation is included in the ticket price.

(II) TRADITIONAL CUISINE:

Involves activities at family and local restaurants with authentic local food using local ingredients with traditional recipes. Consumers are also willing to pay as much as US\$100 for their experience. They are willing to pay more to have a personalized, socially responsible educational gastronomic experience with organic ingredients and

transportation tied in with other activities. With a large volume of businesses in Dangriga and Hopkins being family-owned MSMEs, they are primed to take advantage of tourists interested in this CBT experience.

(III) FOOD AND BEVERAGE TOUR

Involves activities where the local food and beverage, including agricultural products, gastronomic offerings, and food preparation methods, highlight the unique aspects of production processes for cultural meaning and are the primary pull factors. Among those who prefer Food and Beverage Tours and are willing to split their time between relaxing at the beach and exploring the country authentically: most are willing to pay up to US\$300 for their experience. 35% are willing to pay more for any of the following attributes: Organic certification, avoidance of chemicals, locally sourced, Fairtrade certification, and embraces environmental sustainability. 20% are willing to pay at least 25%-50% more for VIP options and access. Garifuna cuisine is as rich as its culture. Many traditional recipes are being utilized for food tour type services currently being offered to international visitors by cluster partners, with particular attention given to Palmento proprietor's efforts, one of the cluster partners and significant contributor for this project. With some refinement and expansion of the product/service delivery, both communities are poised to directly provide value to this target market.

(IV) FARM TOUR

Involves immersive interactive and educational family-friendly activities or tours of working farms using local techniques that are part of the destination country's heritage, which contrasts commercial agricultural practices than what travelers may be used to. Farm tours may include meals, food tastings, and/or accommodations. There are several farms with tours that are readily available to be booked in the wider Stann Creek community. Three of note are the Sabal's cassava farm and factory, Marie Sharp's hot sauce and jelly farm and factory, Maya cacao plantation, and chocolate making experience. Tourists that plan their vacations around their family and what each can do affordably are willing to pay as much as US\$500 for their experience. 64% are willing to pay up to 25% more where transportation is included with the ticket price and tied with other activities. Those interested in this CBT activity are willing to pay more for a Farm Tour that gives a known percent of the ticket price back to the community or includes customized packages or VIP access; 19% are willing to pay at least 25% more personalized packages.

(V) INDIGENOUS TOURISM

Involves CBT activities that are owned, operated, and/or managed by members of indigenous communities, offering unique, authentic, and immersive experiences to visitors while also contributing to sustaining local livelihoods, protecting valued socio-cultural traditions, and the natural and cultural heritage resources of the community. Dangriga has a unique flair with Garifuna owned businesses peppered throughout the community. Hopkins, with its unique charm, offers a unique and authentic experience to travelers. Visitors of both destinations can immerse themselves deeply within the local culture, community, and people. Tourists seeking indigenous tourism are willing to pay up to US\$300 for their experience. 67% of tourists willing to pay up to 25% more if they know a percentage goes back to the community - which conveniently aligns with the proposed cluster partnership for which 100% of all enterprises included are Garifuna owned, managed, and operated. Within this market segment, 60% are willing to pay more for Indigenous Tourism combined with other activities and those that offer transportation and personalized packages, while 56% ready to pay for environmental sustainability, VIP access, accommodations.

2.3. THE SUPPLY – LOCAL CAPACITY AND NEEDS

2.3.1. TOURISM ASSET INVENTORY

The asset inventory captured 152 tourism-related assets in Dangriga and Hopkins, segmented into six main categories. Not considering Local Experts and Infrastructure, for which data on their WOF status is not available or applicable, the total % of women-owned assets is 38%.

An overall assessment of the firms indicates they are on average Visitor Ready. However, businesses may meet some of the criteria in the categories of Market Ready and Export Ready^{xviii}.

Challenges observed for some enterprises indicate support needed in facilitating a presence on digital platforms such as Facebook, OTAs, or website presence, designing of pricing and payment systems and policies, and access to affordable, relevant insurance. Furthermore, access to a system for accepting reservations with provisions for confirmations and booking arrangements. Further capacity needs for businesses are presented in the community diagnostic section of this document.

Accommodation types include hotels and resorts, cabins/ecolodges, homestays, hostels, and apartments. With the average occupancy rate in 2019 being 34.5% in the Stann Creek District, this presents great potential for both communities to receive additional tourist visitor volume. Culture Attractions within the asset inventory were in Dangriga, capturing art galleries, architecture and monuments, and other places of interest.

Dangriga and Hopkins have a wide range of food and beverage options within the ‘service category,’ including ethnic restaurants, full-service restaurants, cafes, clothes and craft markets, souvenir stores, pastry, and snack shops.

Visitors to this area have various authentic and traditional cultural experiences to choose from within the categories of traditional song & dance, food/gastronomy, (candy making, cassava bread making). Various marine adventure experiences are accessible via both communities, including cooking what you catch fishing, snorkeling along the reef, boat tours along the monkey river, and a unique, otherworldly Bioluminescent Kayak Adventure, more closely accessible via Hopkins. For those interested in crafts drum making experiences are available and accessible via both communities.

The ‘local expert category’ are persons such as the world-renowned photographer Tony Rath and world-famous Pen Cayetano, both based out of Dangriga, drum makers, musicians and music groups, and other cultural icons. Infrastructure is present such as visitor information, health, transport, and financial services, to support tourist arrivals in both communities.

Refer to Tourism Asset Inventory within the Annexes for details for specific tourism asset data within the Dangriga and Hopkins Communities such as sub-industry, address, community, and contact information.

	CATEGORY	TOTAL	#WOF	% WOF
1	Accommodations	49	5	10%
2	Attractions	12	6	50%
3	Services	32	21	66%
4	Experiences	23	12	52%
5	Local Experts	17	-	
6	Infrastructure	19	-	
TOTAL		152	44	29%
TOTAL (n/incl. 5&6)		116	44	38%

2.3.2. COMMUNITY-BASED TOURISM (CBT) DIAGNOSTIC

DIAGNOSTIC SUMMARY

The CBT Diagnostic tool provides a frame of reference to assess the community's readiness for CBT based on critical success factors. These factors and their respective scores are presented in the table below. Based on the score obtained, the destination is classified as CBT Capable, falling 2 points short, by 2.6%, classified as CBT ready. Areas where additional support is required within this tool's scope, governance, leadership, access to resources, and product development and marketing.

Category	Maximum Category Score	Score Obtained
Governance and Leadership	18	9
Community Participation	14	9
Access to Resources	12	6
Infrastructure & Services	26	22
Human Resources	14	9
Tourism Assets	24	15
Product Development & Marketing	10	6
Totals	118	76

COMMUNITY-RAISED NEEDS & INTERVENTIONS

Severely reduced tourism-related economic activity directly caused by the COVID-19 pandemic has adversely affected both communities' lives and livelihoods. This drastic and sudden reduction of regular tourism-related cash flow has resulted in access to capital is a more significant challenge than before, emphasizing these areas by informal businesses and the self-employed. The following presents common/repeated community stakeholder-raised priority areas as well as interventions programmed into this document to address:

Priority Needs Raised by Community Stakeholders	Interventions
Access to Capital remained a prevalent concern across communities for the purposes of rehabilitation of infrastructural damages caused by hurricane damage, general infrastructural improvements, and upgrading of facilities, equipment to address COVID-19 related health and safety measures, equipment, and material to re-start their businesses	As guided by Compete Caribbean source documents provided, this funding's scope is geared towards technical assistance. Therefore, business mentorship and capacity building packages have been programmed into the activity components to equip stakeholders with the tools necessary to become self-sustainable and geared towards growth to support these development areas. Further, developing a community fundraising framework will add value in facilitating raising capital for these initiatives.
Legal structure/ Institutional framework for integrating the Dangriga and Hopkins communities, including capacity building for the sustainable management of the Trail.	Support in developing the institutional framework and management tools with complementary capacity building in CBT cluster management.
Marketing & ICT integration: A hub for marketing and branding of trail initiatives requested by many community stakeholders to provide booking and payment support in the form of a website and app.	The development of a website and app, branding package, marketing tools, and marketing assets has been programmed into the project activities, including a marketing campaign. Implementation of a business mentorship package will also facilitate placing cluster partners on online OTAs such as Booking.com and Airbnb Experiences, Google Business, et al. Support is to be provided under this project's scope enhancing CBT offering such as trail collaboration opportunities between both destinations.

CLIMATE CHANGE

The communities of Dangriga and Hopkins have experienced the adverse effects of climate change on various levels. Hopkins has been known for its beautiful beaches, which locals and international visitors enjoy. In recent years sargassum^{xix} blooms have left a less-than-appealing appearance to beaches along Belize’s mainland and island coastlines. With Dangriga and Hopkins being coastal communities, both are susceptible to extreme tropical systems and hurricanes. Dangriga stakeholders have indicated that they have witnessed receding shorelines in the Dangriga community over the years. Measures need to be taken by local and/or central government to address this occurrence.



WOMEN-OWNED FIRMS

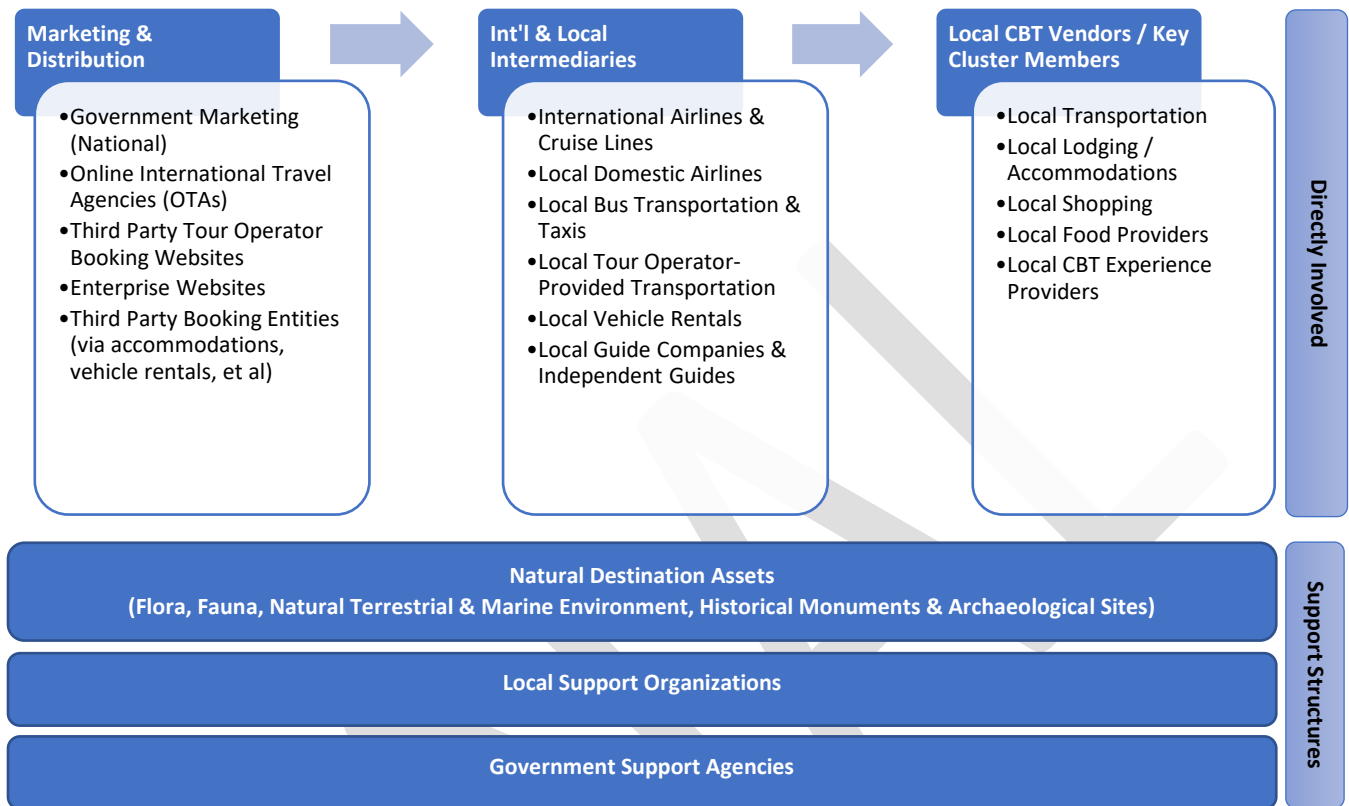
Women overall play a crucial role in Dangriga and Hopkins's society, culture, and business landscape. Of the 41 enterprises that comprise the Hopkins Local Business Association (HLBA), 66% are women-owned, co-owned, and/or operated. In contrast, of the 14 stakeholders met within the group consultations in Hopkins, 36% of those who attended were women. In Dangriga, of the six key stakeholders met with 67% were female-owned/ led enterprises.

2.3.3. THE CBT VALUE CHAIN

The following depicts the value chain for the CBT market segment in Dangriga and Hopkins with the flow of funds and three critical categories of entities directly involved in the value chain. They are presented in chronological order to which tourists are exposed to these actors along the CBT value chain.

It is not uncommon for local ‘tour companies and guides to have a vastly higher price for experiences than paid to vendors. One typical example involves meals, where a lunch or dinner meal may be priced at \$25-\$30 USD per meal, while the actual cost of said meal charged by CBT vendors is \$5-10 USD per meal. Tourism activity often does not focus directly on CBT vendors; in contrast, they are far more likely to cover a wider geographic area of Belize outside the target communities. Efficiency in these areas can be addressed via a centralized portal of CBT vendors (as is proposed in Component 2) with cluster-informed market prices and options, thus providing greater value to tourists. The efficiency of costs may further be achieved by CBT cluster members offering community-

based packages to tourists, utilizing local vendors who live in these communities, those providing a reasonable basis for lowering costs.



MARKETING & DISTRIBUTION (PRE-TRAVEL): Worldwide, consumers are shifting to using digital channels to book travel. Online travel booking is growing almost twice as quickly as the overall market. Locally, we can observe that larger hotels/resorts increase their presence on social media, which are also more likely to have an enterprise website than smaller vendors or MSMEs. The latter has an online presence and is more likely only to have a social media presence. Some enterprises have allowed for a greater volume of bookings via established and trusted international OTAs such as Airbnb, Booking.com, and Expedia. Local CBT vendors can place listings on these centralized websites that carry varying measures of insurance provisions, service provider interfaces, payment collection options, and trip planning options for which OTAs collect varying levels of commissions from vendors.

According to the VEMS study data, in 2019, 20% of Belize’s overnight visitors booked their trips pre-paid packages, 39% booked via a travel agency, and 48% booked via various internet sources. Local tour companies and a small number of local CBT vendors in the target communities have websites and online resources for which travelers can access and pay for accommodations and experiences countrywide. Bookings via these mediums also carry a commission collected by the local booking sites.

For tourists who do not book online and in advance, it is common for local third-party entities to collect a commission from CBT vendors as a referral fee, including vehicle rental entities, those providing accommodations, and even private individuals. These provide a valuable income source to vendors who do not have online listings or affiliations with entities engaging in the marketing and distribution of CBT products online.

INTERNATIONAL & LOCAL INTERMEDIARIES (BEGINNING & END OF TRIP): This category of actors involves those who engage tourists at the beginning and end of their trips within two key areas: International Transportation,

Local Transportation, and Tour Guide Companies & Independent providers. Travel to Belize may be done in 4 ways: via international airlines, cruise lines, land ports of entry, and seaports. Once in-country, tourists have a variety of local transportation options available to them at price points commensurate with the level of personalization.

LOCAL CBT VENDORS: These are cluster vendors that directly provide CBT services in the areas of Food & Beverage, Entertainment, Lodging / Accommodations, Experiential Services, among others.

2.4 THE NEW NORMAL POST-COVID

The COVID-19 pandemic has brought about a global massive global downturn in economic returns experienced across most discretionary spending sectors. Tourism, logistics, nonessential food and beverage, and discretionary business operators have been among the hardest hit within Belize, with borders closed and international tourism forced to an abrupt and unexpected halt. From an economic standpoint, operators within the tourism industry will need to assess their business models, including revenue projections, pricing structures, marketing efforts, etc., to evaluate their ability to provide the most value to customers, a critical selling point COVID-19-affected socio-economic landscape. Interestingly, the COVID-19 numbers in both Hopkins and Dangriga are the lowest in the country and may prove valuable marketing tools.

Internally, business operators within the tourism sector and all ancillary industries that support it – including government and NGOs, will need to make conscious efforts to align their health and safety protocols with WHO recommendations, including wearing masks, practicing physical distancing, and proper washing/sanitizing of hands, and contact tracing mechanisms. These service options will also need to be provided to customers, and communicating this as a part of the business brand – both online and on-site via signage – will be a necessary component for all future business activities.

Naturally, this will require tourism sector operators to make additional investments in equipment and commodities (sanitizers, masks, etc.). However, engaging customers online will be important, and selling pre-paid packages with options for discounts or free re-scheduling of trips (for example) in exchange for a non-refundable down payment will allow tourism sector actors to increase sales despite the Covid-19 pandemic.

The Government of Belize, via its Ministry of Health and Ministry of Tourism, has made efforts to engage the public on health and safety protocols; however, additional training may be required for tourism sector actors, emphasizing sole proprietors MSMEs in these areas. The Sustainable Tourism Program II is preparing a Program to Train and Certify MSMEs countrywide, which is expected to be finalized within 2020.

Our society's very fabric has left socio-economic scars globally, which we are likely to continue to see the effects to different degrees as the Covid-19 pandemic evolves. Spending habits are changing both in Belize and Internationally. Consumers are demanding greater value for money, spending their money on experiences, and 'giving back' to communities while remaining safe and healthy.

With some upgrades to health and safety equipment and capacity building in these communities, the Dangriga-Hopkins area will be primed to be a highly demanded destination. Data on traveler trends support this in that travelers seek more authentic cultural experiences and are willing to pay more for tours with private options. When they know, a portion of the funds goes to the community. While global tourism and international-visitor numbers increase to pre-Covid-19 levels, the communities should focus on marketing the communities as a daytime destination to the domestic market and others using San Ignacio, Independence Punta Gorda as their hub. This should form part of the strategy. For example, e.g., Visitors supporting a clean-up campaign get free

herbal healing tea at Tuani’s cultural food restaurant with food orders. Inputs to the menu should highlight community involvement, such as chicken breaded with cassava crumbs from Sabal Farms.

COVID-related measures of vital importance for cluster members fall into the following areas:

- A unified health and hygiene standard to be adopted by cluster partners.
- A monitoring mechanism with checks and balances to ensure standards are being adhered to.
- A contact tracing system to assess risk and track any potential spread.
- Capacity building for cluster partner members in these areas
- Some infrastructure investments to upgrade restroom facilities to help visitors feel safe.

2.5. THE CLUSTER

Although the initial concept note associated with this CDP contained an initial listing of only eight enterprises to be a part of the cluster, 47 indigenous community stakeholders have since rallied together in the spirit of bringing economic development to their communities. Together, these enterprises form the core CBT products and services across both communities, each supporting a different role in the tourism industry's sub-sectors. They provide diverse experiences, accommodations, food and beverage, and other supporting services to support CBT development. The Cluster partners have been self-categorized into three categories: (3) light-providing symbols that all shine uniquely. Additionally, a listing of government and other entities are the key support organizations endorsed for inclusion by the cluster stakeholders.

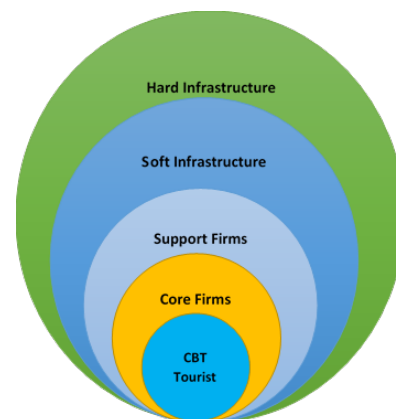
- **“Weyu”** (sun) –established businesses that are mostly market-ready and experiential activities
- **“Hatei”** (moon) – are Professional/ supporting services that will help the firms in the cluster to carry out their activities
- **“Waruguma”** (star) –additional attractions that include some smaller local businesses. The full list may be found in the Appendix.

CLUSTER MAPPING

The following outlines the types of firms within the Garifuna Cultural Tourism Trail cluster:

- **CORE FIRMS:**
 - Including Indigenously owned accommodations (Hotel, hostel, cabins, guest houses; homestay),
 - food and beverage enterprises (lounges, restaurants (with beach-side views and within the communities) bars, ice cream, pastry, and snack shops,); Indigenously provided cultural tourism enterprises and tour operators for cultural-, eco-, and adventure tourism; Art Galleries; Indigenous artisans and crafts-persons; Gift shops

- **SUPPORT FIRMS:**
 - Including Indigenously owned local inbound and outbound transport firms for before and post-trip transportation to and from communities; Media enterprises (printing studio, social media, graphic design, photography, videography, and documentaries, et al.), Laundry services;
- **SOFT INFRASTRUCTURE:**
 - **(i) Support organizations** such as local organizations working in areas such as farming, fishing, cultural promotion, business development, cultural development, community tourism development, and health and wellness. A list of potential supporting organizations can be found in the Annexes section.
 - **(ii) Public (Government) Agencies** include Government Ministries and Agencies such as the Ministry of Tourism, Belize Tourism Board, National Institute of Culture and History (NICH), Village and Town Councils.
- **HARD INFRASTRUCTURE:**
 - Museums; Monuments; Food Farm (e.g., Cassava); Public coast (beach) access; National Parks and Coastal Tourism Destinations at the periphery of the target communities; These include Paved access roads directly to the communities; Established telecommunications (Phone and Internet) network – in addition to other essential utilities; community police structure.



SECTION III: STRATEGIC ANALYSIS

3.1. SWOT ANALYSIS

The following summarizes the strengths, weaknesses, opportunities, threats specific to Dangriga and Hopkins.

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> ● UNESCO has designated Garifuna dance, music, and culture as a “Masterpiece of the Oral and Intangibles Heritage of Humanity ● Indigenous knowledge and strong cultural retention amongst elders. ● Unique and authentic and diverse CBT experiences and attractions that align with international demand High volume and diversity of experiences and natural and marine attractions in the surrounding area. ● Natural attractive coastal/beach-front communities with a strong sense of community and welcoming to CBT tourists ● Arable farmland for agricultural development (inputs for culinary experiences, domestic consumption, and export) ● Access to excellent transport infrastructure via Hummingbird and Coastal highways. 	<ul style="list-style-type: none"> ● Absence of incubators, certification opportunities, and inadequate access to capital and training opportunities, market and marketing and research skills ● Ongoing cultural atrophy among youth ● Lack of dedicated national marketing efforts and signage to direct CBT tourists to CBT providers ● Lack of a framework to communicate cultural authenticity with particular emphasis on these communities and the Garifuna culture ● Lack of a dedicated CBT online management and cash-less payments structure for promoting tourism, securing, managing, and tracking bookings. ● Lack of a formalized management structure necessary for an optimized value chain and coordination of CBT activities.

OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Community-based /Cultural Tourism certification program and specific certifications and/or trademarks, e.g., for Garifuna massages • Marketing utilizing social media, OTAs, and other internet platforms (i) for the documentation of traditional knowledge, (ii) to digitize festivals, tours, and other CBT experiences, and (iii) to showcase <i>both communities</i> as one destination for a greater volume of tourism revenues in the communities leading to efficiencies and financially sustainable business operations; while marketing <i>Dangriga</i> as a coastal/beach community, highlighting the marketable aspects of their unique strategic positioning statements to attract a higher visitor volume to stay for longer; and while marketing <i>Hopkins</i> as an off-grid and get-away to attract higher-spending target markets for weddings and business seminars. • Capacity building for developing food product labeling and consistency export-ready and raising/developing standards in the areas of health and safety, financial, technological, quality, and service capacity. • Expansion of culinary products for domestic sale via partnerships and highlighting specialty foods (such as cassava) • Improving/developing public spaces and access ports for offshore destinations to increase domestic (Belizean) tourism and drive local economic activity during the Covid-19 recovery period 	<ul style="list-style-type: none"> • Climate change impacts: sargassum, beach erosion, and flooding, and natural disasters such as tropical storms and hurricanes, pandemics, or economic recessions • Substitute tourism products with lower daily expenditure needs for CBT tourists • Hyper-commercialization of the target communities' community-based/cultural tourism product offerings with increased volume can lead to what community stakeholders refer to as 'culture vultures.' • Displacement of locals by increasing demand for Beach Front Properties by foreigners. • The possible deterioration of the cluster communication • Competition between CBT accommodations and larger resorts may have more capital.

3.2. PORTER'S FIVE FORCES FRAMEWORK

Porter's five forces model is utilized to assess the community-based tourism industry's level of attractiveness that focuses on the Garifuna culture/people with a concentrated population in Dangriga & Hopkins's communities^{xx}. It is observed that the development of this industry has a moderate to a high level of attractiveness: the global demand for CBT tourism products is growing, and positive rivalry within the industry can be observed, leading to innovation and an increase in the diversity and quality of product offerings. Furthermore, the Garifuna culture/people are unique to this region within Belize, and only a few Garifuna communities exist worldwide. The Garifuna CBT tourism market is therefore assessed as moderately to highly attractive.

Rivalry among Competitors	Barriers to Entry	Bargaining Power of Suppliers	Bargaining Power of Buyers	Threat of Substitutes
MODERATE	HIGH	MODERATE	LOW	MODERATE
Locally rivalry within these specific communities is HIGH due to travelers' lower visitation for CBT experiences/tourism products. Internationally rivalry is considered MODERATE as there exist other Garifuna communities within the region.	A determination of " HIGH " is made considering that only a few Garifuna communities exist in the world	Within the context of a small geographic area of focus and a being unique CBT product, a HIGH bargaining power allocation is made. Within the context of quality of service provided by CBT providers, a LOW allocation is made. The average allocation made is "MODERATE."	LOW , as only a few Garifuna communities exist in the world	LOW , as only a few Garifuna communities exist in the world. Nationally, Mayan CBT products may be viewed as substitutes by CBT seekers. A ranking of MODERATE TO HIGH is therefore allocated within the latter context.

3.3. STRATEGIC POSITIONING

The Dangriga and Hopkins Cluster is treated as one tourism destination with two sub-destination offerings with unique qualities targeted to their respective target markets. A lower population density makes the destinations a unique place for cultural explorers to travel -or work from- safely. The following are recommended positioning statements proposed by community stakeholders for the Dangriga/Hopkins communities. These may be refined and developed further during the implementation of this project's activities.

- **Dangriga & Hopkins: "Sharing the Garifuna Legacy"**: The underlying theme of the trail is to share the legacy of the Garifuna people, highlighting their cuisine, culture, community, and history.
- **Dangriga: "Experience the Culture Capital"**: The Dangriga community has proposed to leverage its "Belize's Culture Capital" brand, galleries, museums, and monuments, to further develop economic activity in this community within the scope of culture, community, and history.
- **Hopkins: "Rock it Like a Local"**: With a high concentration of charming Garifuna-owned businesses along with this coastal village, the community has proposed to develop further and apply the concept of "Rock it Like a Local" where CBT travelers may experience the Garifuna culture first-hand.

The target consumer is middle-income vacationers from North America seeking the following CBT experiences: Local Tourism, Traditional Cuisine, Food and Beverage, Farm Tours, and Indigenous Tourism, as described in prior sections. Targeting this type of consumer, which is aligned with the Dangriga/Hopkins tourism assets, would lead to an increase in tourism revenues for this area, directly impacting 47 enterprises employing 118 employees, of which 44 are permanent, and 12 are temporary female employees. Indirectly, this increase in tourism revenue, and therefore economic activity, would impact over 345 enterprises^{xxi}, the families of the enterprise owners and employees, and ultimately the residents within the Dangriga and Hopkins communities.

Eighteen of the forty-seven enterprises were either willing or able to share sales data. Of these eighteen enterprises, total sales were \$1,422,100 for the year 2019, with an average annual sale of \$79,000 per enterprise. These enterprises employed 90 of the 118 total employees, 32 of the 44 permanent women employees, and 11 of the 12 temporary employees.

With the economic impact of Covid-19 on global economies and their tourism industries, the baseline sales data have been adjusted to account for these adverse effects. The baseline average and annual sales figures have been decreased to 30% of 2019 sales data. Sales are expected to rebound to approximately 90% of their 2019 numbers.

SECTION IV: IMPLEMENTATION

4. 1. IMPLEMENTATION PLAN

The implementation plan is divided into three core components:

Firstly, the development of an Institutional Framework and managerial tools necessary for implementing this project, ensuring that the foundational capacity is built into key stakeholder groups^{xxii} in the areas of financial competence and service quality, utilizing the CBT Toolkit wherever possible. Capacity-building measures also include the strengthening of the Hopkins Local Business Association (HLBA). This component further consists of a business development/mentorship program to complement the pre-requisite capacity building activities. Strength lies in established businesses such as Uwanie Martinez, who already serves as a mentor in her community. As others are developed, they can pay it forward, tied into the mentorship agreement. This program seeks to enhance existing and develop new CBT goods, services, and experiences, improving the target communities' value chain.

Further, it will support the process of ensuring that cluster partners are placed on online platforms that are most applicable to their business, experience, or service type, platforms such as social media, Trip Advisor, Google Business pages, Airbnb Experiences, et al. This component is to be implemented in the first year of this project. The Ministry of Tourism will support the 24-month implementation of this cluster development plan with the Cluster Manager. Due to the limitations of this document, the Implementation Plan (Annex A), as well as Terms of Reference (Annex B), form an integral part of this section.

Secondly, the design of marketing, branding, communications framework, ICT integration tools, and capacity building for the cluster to access and promote its CBT products to high-value target markets. Where available, online tools, such as Treksoft^{xxiii}, should be integrated into the platform to allow for better management of destination management options. This component will support the launch of the digital marketing strategy. It will lend support to the cluster partners throughout the life of the project for ongoing capacity building. This component is to be implemented over the full 24-month course of the project; due to this document's limitations, the Implementation Plan (Annex A) and Terms of Reference (Annex B) form an integral part of this section.

The **Third** Component's scope will support project management (cluster manager), participation in international tourism expos and fairs, and installing equipment such as signage and collaboration maps between the persons in the trail between the two destinations. Furthermore, as part of one cluster partner's cash contribution to the project, the infrastructural improvements to their CBT property, including livestock purchase, land clearing, and planting to improve the previously cultural tourism product, are envisioned. Due to the limitations of this document, the Implementation Plan (Annex A), as well as Terms of Reference (Annex B), form an integral part of this section. It is important to note here that the Ministry of Tourism's in Cash Contribution is allocated for a dedicated project manager. In contrast, an in-kind contribution is provided by community stakeholders primarily for logistical support, meeting spaces et al. - as per their contribution letters in the appendix.

These main components have been designed to work in tandem as the foundation for sustainability of cluster actions during and following the conclusion of project activities. They have considered complementary measures within the tourism destination development plans developed by the Ministry of Tourism for the Hopkins and Dangriga communities.

Potential challenges in implementing project activities may include comprehensive agreement on the institutional framework and larger, community-level marketing activities. Therefore, the business development/mentorship program has been integrated into this document to allow 'one-on-one' support for enterprise-specific development initiatives.

Local coordination or project activities will be provided by the Ministry of Tourism and Diaspora Relations. The cluster manager will serve as the project lead for ensuring all component activities are implemented while providing liaison support among stakeholders, the Ministry, and benefactors. Ingrid Cayetano of the Pen Cayetano Studio Gallery and Uwanie Martinez of Palmento Grove Cultural & Fishing Lodge have offered themselves as the community leads for Dangriga Hopkins, respectively, with no objections from cluster partners.

4.2. PROJECT BUDGET & SOURCES OF FUNDS

Compete Caribbean's contribution to this project is US\$350,000, representing 78% of the total and maximum US\$450,000 project value. Stakeholder contributions total US\$100,000.00, representing 22% of the project value. The stakeholder contributions are outlined below:

Entity Responsible	Amount (US\$)	Type	Purpose
Ministry of Tourism	\$15,000	Cash	Procure and install marketing equipment, infrastructure, and assets to enhance the product and service offering of the Tourism Trail's initial participants.
Ministry of Tourism	\$35,000	Cash	For the procurement of a project manager.
Palmento Grove Garifuna Eco-Cultural And Fishing Institute	\$15,000	Cash	Infrastructural improvements, purchase of livestock, land clearing and planting to improve the ago-cultural tourism product
Hopkins Local Business Association	\$10,000	In-Kind	Primarily: Human resources time and work, provision of venue and logistical support, including ongoing management and upkeep of the trail
Pen Cayetano Studio Gallery	\$25,000	In-Kind	

A summary of the project budget is presented in the table below. Details for each activity's value may be found within the implementation plan, annexed to this document.

Component	Compete Caribbean Funding ^{xxiv}	Counterpart Funding		Total Funding
		In-cash (10%)	In-kind (10%)	
Develop an Institutional & Managerial Framework for Community Based Tourism along the Tourism Trail by strengthening the expanded Hopkins local business association.	\$100,000	\$0	\$0	\$100,000
Design and develop a marketing/branding, communications framework for the cluster partnership signatories and prospective trail members, inclusive of ICT integration tools. This will assist them in promoting their CBT products to the high-value target markets envisioned. A Capacity Building Program for trail participants must be a component to ensure the sustainability and use of these developments.	\$200,000	\$0	\$0	\$200,000
Project Management Support & Cluster Development Initiatives	\$50,000	\$70,000	\$30,000	\$150,000
Total	\$350,00	\$65,000	\$35,000	\$450,000

All values presented are in USD/US\$: United States Dollars

4.3. PROCUREMENT PLAN AND TERMS OF REFERENCES

The grant funding provided by Compete Caribbean, if selected, will be allocated to technical assistance. The procurement plan presented in Annex A refers to 11 procurement procedures for individual consultancies for services and one (1) for infrastructure/equipment; the latter is to be allocated from the Ministry of Tourism's in-cash allocation. In some instances, several activities within the same component have been programmed to be implemented by one consultant firm. The procurement plan within Annex A generally indicates each consultancy's activities and their associated costs, start dates, and durations. At the same time, the Terms of References expand on the tables below in greater detail.

COMPONENT 1 / CONSULTANT FIRM 1: INSTITUTIONAL DEVELOPMENT & CAPACITY BUILDING

Role	Design and deliver Institutional Framework and Management tools to support the operationalization of the Tourism Trail. Design and develop a Capacity Building Program for trail participants (cluster partnership signatories and prospective trail members). Develop and Implement Business Development/Mentorship Program
Objectives	1. Establish the institutional framework and management tools to support the Garifuna Trail's operationalization, inclusive of business registration, governance materials, and Articles of Associations. 2. Build management, financial, and service quality capacity (training) among Cluster Partners and prospective cluster members. 3. To enhance the quality of- and expand the quantity of- product, service and experiences, packages, and other product offerings for Cluster Partners. 4. To assist in evaluating and facilitating businesses' placement on OTA's and other online platforms to expand the target market reach.
Responsibilities	To ensure 1. Cluster Partners and prospective cluster members have the capacity, tools, legal and administrative framework to oversee and manage the Garifuna Trail; 2. Cluster Partners and prospective cluster members can financially manage their CBT businesses, products, and experiences; 3. Cluster Partners and prospective cluster members have enhanced and expanded their CBT value chains, products, services, & experience offerings.
Key Deliverables	Inception report, Institutional Framework, Management Tools, Capacity Building Training Programs, Business Development Training Program, comprehensive final report, registration documents, Articles of Associations, and possible stamps and seals.

COMPONENT 2 / CONSULTANT FIRM 2: MARKETING & COMMUNICATIONS

Role	Design the strategic Marketing and Communications framework for the Tourism Trail; Capture and Design Digital Assets, Signage, and Promotional materials for the Trail; Design and develop a website, mobile app, social media, and mobile-technology business presence
Objectives	1. Develop and implement a Comprehensive Marketing & Communications Strategy for the Garifuna Trail. 2. Develop and launch a web-based platform and mobile application for the Garifuna Trail and make recommendations for the participation in other platforms such as TripAdvisor, Airbnb, Google Business, et al., to be implemented during the business mentorship program. 3. Build capacity among trail members in the use and participation within the marketing and communication program, including trail collaboration packages delivered in Component 1.
Responsibilities	To increase marketing capacity, presence, and accessibility of participating entities within the Tourism Trail through strategic branding and marketing tactics; To improve/increase access, and ultimately sales, to target markets nationally, regionally, and internationally for CBT products and experiences along the Trail with a fully technically trained management complement for the operation of the online platform.
Key Deliverables	Inception report; Strategic Marketing & Communications Framework; 1-year digital content action plan; Marketing-ready photo and video content assets for each of the Trail, the Dangriga Community, the Hopkins Community, each cluster partnership signatory, other prospective trail members; Marketing & Communications Training Program Report; Fully functioning website, app, and Registration of Social Media Pages; Marketing Activity Report; Final Report.

COMPONENT 3 / INDIVIDUAL CONSULTANT: PROJECT MANAGEMENT

Role	Provide project management support
Objectives	The successful implementation of the Cluster Development Plan activities.
Responsibilities	<ol style="list-style-type: none"> 1. The Oversight and Management of the program to ensure timely execution, monitoring and reporting of the program's technical and financial aspects, and achieving the planned outputs and outcomes and goals as reflected in the program result matrix, creating an environment of teamwork between all parties. 2. Providing local support to the IDB in the procurement of activities in accordance with pertinent procurement guidelines and support documentation of the project. 3. Ensuring that program evaluation and monitoring of results (including the establishment of baseline indicators, monitoring outputs, and outcomes) and report preparation are done within an agreed-upon timeframe and in compliance with the project's reporting requirements. 4. Coordinate with the IDB, partner agencies, relevant public and private sector stakeholders, and contractors and consultants. 5. Adequate risk assessment activities, including identifying and resolving implementation challenges, with the Project Team's guidance, pertinent steering committee(s), the Ministry of Tourism, and the IDB. 6. Technical support, facilitation services among stakeholders, as needed, including developing relationships with cluster stakeholders to earn trust, understand concerns, identify common interests, and encourage collaboration through a participatory approach focused on achieving common objectives, priorities, as well as detailed activities, roles, and responsibilities. 7. Organize and take part in site visits to the project sites as and when necessary. 8. Prepare objective reports reflecting project implementation.
Deliverables	1 Inception Report, 7 Interim Reports, 1 Final Report

SECTION V: MONITORING, EVALUATION & GOVERNANCE

5.1. MONITORING AND EVALUATION (M&E) FRAMEWORK

The project implementation will be actively monitored by Compete Caribbean, the Caribbean Tourism Organization (CTO), and the cluster stakeholders, including the Ministry of Tourism, in accordance with the Monitoring & Evaluation (M&E) framework, implementation schedule, and detailed budget. This section describes the key indicators specific to this project that should be tracked to assess potential impact and monitor progress. The following table presents the project's objectives and targets.

It is important to note that available non-financial 'Baseline' figures reflect current data. However, financial data has been adjusted to 30% of 2019 Sales figures to reflect the current Covid-19 economic landscape. Considering that the tourism industry is sluggish and current projections do not expect global travel to return to pre-Covid-19 levels until 2023, recent baseline financial figures have been adjusted downward from USD 1,442,100 by 30% of annual figures provided by stakeholders for 2019 to USD 432,630.00. Note that average sales per cluster are total sales figures divided by the total number of enterprises that provided sales data.

Key Performance Indicators (KPIs)	2019	Baseline	End of Year 1 <i>(for financials: 30% of "2019")</i>	End of Year 2 <i>(for financials: 70% of "2019")</i>	End of Year 3 <i>(for financials: 90% of "2019")</i>	Total <i>(including baseline)</i>	% increase expected at the end of year 3
Total sales of the cluster sample (USD)	\$ 1,442,100.00	\$ 432,630.00	\$ 721,050.00	\$ 1,009,470.00	\$ 1,297,890.00	\$ 3,461,040.00	200%
Average sales of the cluster sample (USD)	\$ 79,006.00	\$ 23,701.80	\$ 39,503.00	\$ 55,304.20	\$ 71,105.40	\$ 189,614.40	200%
Total # of enterprises involved (directly or indirectly)	-	47	59	71	89	n/a	90%
# of enterprises owned 100% by a women	-	8	10	12	15	n/a	90%
# of enterprises partially owned by a women	-	13	16	20	25	n/a	90%
# of enterprises partially or totally owned by a women	-	21	26	32	40	n/a	90%
Total # of employees for cluster data sample (Permanent & temp.)	-	116	145	174	220	n/a	90%
Average # of employees for cluster data sample (Permanent & temp.)	-	4	6	7	8	n/a	90%
Average # of new products or services offered per enterprise	-	--	2	5	10	17	400%
Estimate # of products or services offered	-	141	176	212	268	797	52%
# of people trained	-	--	192	221	n/a	413	15%

5.2. GOVERNANCE & INSTITUTIONAL ARRANGEMENTS TO OPTIMIZE SUSTAINABILITY

This section describes how the cluster will be governed during and beyond the project, highlighting the governance structure to facilitate decision-making, problem-solving, trust-building, oversight, and support to the various consultancies as the project unfolds.

A. Governance structure:

Ideally, the governing consortium in the form of a steering committee with fair representation should comprise the cash and in-kind contributors to this project's initiatives and key private sector stakeholders/cluster members. Keeping teams small and having regular monthly meetings in person or via online portals may be beneficial to simplify scheduling and logistics. In this regard, during project execution, a steering committee of nine (9) members will be established. This Steering Committee will comprise four (4) Cluster Members from Dangriga and four (4) Members of the Hopkins Local Business Association who are also Cluster Members. The four members will represent different subsectors in each destination: one from the Hotel Sector, one from the Restaurant Sector, one from the Tour Operator Sector, and one from the Creative Industry. The 9th Member will be a representative from the Ministry of Tourism. These nine members will have voting and decision-making rights. Additionally, the Steering Committee can invite observers (Private, Public, and Civil) from other organizations to provide technical advice and support in the project execution process; however, these observers will not have voting or decision-making power. A chair will be voted amongst the nine voting member steering committee.

Beyond the project, Component 1 of the plan proposes for an Institutional Development activity to be carried out which will assess the feasibility of establishing and developing the requisite operational requirements and capacities for an expanded Hopkins Local Business Association, in which an umbrella organization will be established with two separate chapters, Hopkins and Dangriga. In conjunction with the chapters, the Umbrella Organization will be responsible for the day-to-day management of the Trail.

B. Private sector – Where it relates to project execution, the Project Steering Committee will be composed of four private sector members of the trail from each of the communities representing the Hotel Sector, the Restaurant Sector, Tour Operator Sector, and Creative Industry. Additionally, private sector partners can be invited as observers to provide support during project execution.

Beyond the Project, it is envisioned that the Management Entity established for the Trail will have the technical and human resource capacity to build business partnerships with the private sector community within the tourism value chain to grow business activity and demand.

C. Counterpart contributors – It would be necessary for the cash and in-kind contributors to be part of the steering committee.

D. Key Stakeholders in the decision-making process – The Steering Committee will further ensure inclusion and diversity by stipulating the four voting steering committee members from each destination that at least 50% (2) are women. Additionally, the terms of reference of the Steering Committee will also stipulate that at least 75% of the nine voting members will be required to be of Garifuna descent. Stakeholder discussions have indicated an equitable process involving all cluster partnership members where each partner has one vote. Vulnerable groups, such as youth and elders, should be considered. Note that these are to be specified by the cluster manager in collaboration with the consultant for component 1, as guided by the community cluster members' needs.

E. Codes of conduct or policies – Codes of conduct, procedures, and policies are necessary for quorum and decision-making, attendance and terms for substitute representation, and removal from the committee. These are to be determined with a consultative approach in the implementation of this project.

F. How to ensure proper representation of women and vulnerable groups in the decision-making process of the cluster? With specific reference to women's representation on the steering committee/within the governance structure, women should always have at least 50% representation on the committee, unless otherwise not possible. Where not possible, women's participation should be proportionate to the cluster partner diversification, i.e., if 40% of cluster partners are WOF, then a 40% representation should be on the committee. In tandem with the consultant firm under component 1, the project manager shall have the responsibility of ensuring adequate representation, with oversight from the Ministry of Tourism and Compete Caribbean. To be refined as a part of component 1 of the implementation plan. At least 50% of the steering committee should be women. No less than 75% should be indigenous people unless otherwise not possible – To be refined as a part of component 1 of the implementation plan.

G. How to ensure that women-owned firms benefit from this cluster initiative? – At least 50% of the funds should be allocated to WOF. This will encourage the inclusion of women in the management of businesses and on the committees. We recommend that 50% be included in the mentorship training and preparation as well.

H. What procedures should be put in place to optimize transparency and integrity? – In the absence of internal procedures, utilizing internationally accepted procurement procedures for the procurement of goods and services. Furthermore, The Ministry of Tourism is versed in IDB Procurement Procedures, and these can be

adopted if necessary. Meeting records/minutes must be circulated to Steering Committee members and made available to all cluster partners. Press releases are issued quarterly, which reflect the official decisions made within the steering committee meetings, allowing for an additional layer protecting the committee's integrity and objectivity. This should be integrated as part of the local communications and risk management under component 2. Where there are documents to circulate, they should be done to each partner individually.

I. Should a communication plan or guidelines be established to prevent negative impressions and facilitate buy-in? – Quarterly public consultations held via an online portal or in-person to engage community members and address any concerns/ questions/ et al. The marketing strategy shall integrate a plan and campaign to promote the initiative and dispel concerns. A monthly newsletter and weekly social media updates with input from the cluster members will help keep the energy alive as successes, and best practices are shared.

J. How often should the steering committee connect, and how? What procedures should be put in place for selecting or dismissing members of the board's steering committee? - Steering Committee should meet at least once monthly with a hybrid format: in-person and via an online web conference portal (Zoom, Google Meet, Microsoft Meetings, et al.). This format will allow for keeping with health, hygiene, and safety considerations that may persist into the future. Regarding dismissal, the steering committee terms of reference need to indicate rules and terms for termination for reasons of delinquency, non-participation, non-fulfillment of other duties that are reasonably expected, et al.

K. What is the vision for the governance structure and financial sustainability of this cluster operations after the project? Should the board be responsible for raising the funds necessary to employ a cluster manager going forward? – Due to the current economic landscape within Belize and around the world, coupled with unprecedented tourism volumes in recent history, the consultant/consultant team under component 1 shall be responsible for formally determining the sustainability measures upon project implementation. However, concepts for consideration may include cluster partners contributing 'cluster dues' or 'cluster fees' and government contributions, the latter providing the higher probability of ensuring sustainability. Ideally, steering committee participants should have a strong desire to champion community-based tourism initiatives to champion/participate on a volunteer basis. They utilize a core committee to oversee relevant joint efforts, supported by localized enterprise groupings, such as the HLBA in Hopkins and the business grouping to be solidified in Dangriga. This group will be strengthened as a part of the capacity-building efforts in Component 1.

A.1. MANDATORY ANNEXES

A.1.1. TOURISM ASSET INVENTORY

(Refer to File Dossier)

A.1.2. COMMUNITY DIAGNOSTIC

(Refer to File Dossier)

A.1.3. CBT DESTINATION PROFILE

(Refer to File Dossier)

A.1.4. ANNEX A – CLUSTER PROJECT DETAILS

(Refer to File Dossier)

A.1.5. ANNEX B – TERMS OF REFERENCES

(Refer to File Dossier)

1.1.6. ANNEX C – LETTER(S) OF COMMITMENT

(Refer to File Dossier)

A.1.7. ANNEX D – SIGNED CLUSTER PARTNERSHIP AGREEMENT

(Refer to File Dossier)

A.2. OTHER ANNEXES

A.2.1. SUMMARY OF GEOGRAPHIC AND SPECIAL INTEREST MARKETS

A.2.1.1. CURRENT MARKETS – GEOGRAPHIC MARKETS

AMERICANS (UNITED STATES)

Visitors from the United States account for 68% of Belize's overnight visitors, the largest market of visitors to Belize. 33% of American visitors in 2019 had traveled to Belize before. 79% of American visitors to Belize in 2019 were equally distributed within the age ranges of 25-64, with the highest concentration of visitors (22%) being between the ages of 25-34. 82% travel to Belize for leisure. Segmented by their travel companions: 39% travel with spouse/partner only, 22% travel with family, and 20% travel with friends.

Top destinations for American visitors while on their trip to Belize in 2019 include Ambergris Caye (43%^{xxv}), Caye Caulker (21%), and San Ignacio (15%), while 8% visited Hopkins while on their trip. 66% stay at a hotel/resort, and 13% at rented Living Spaces^{xxvi}. The average daily expenditure is \$180.75, which is greater than the daily average for all geographic markets.

CANADA

Canadians visiting Belize account for ~8% of total visitors to Belize and are the third-largest market by country/region. 27% of Canadian visitors in 2019 had traveled to Belize before. 90% travel to Belize for leisure. Segmented by their travel companions: 21% travel alone, 38% travel with spouse/partner only, 16% travel with family, and 23% travel with friends.

Top destinations for Canadian visitors while on their trip to Belize in 2019 include Caye Caulker (43%), Ambergris Caye (39%), and San Ignacio (29%), while 10% visited Hopkins while on their trip. 50% stay at a hotel/resort, and 24% stay at a hostel/camping ground. The average daily expenditure is \$135.18, which is below the daily average for all tourists.

EUROPEANS

This is true for European tourists, which account for ~11% of overnight arrivals, the second-largest geographic market. Only 9% of European visitors in 2019 had traveled to Belize before. 66% of European tourists who visited Belize in 2019 were between the ages of 18-34, with the highest concentration of visitors (48%) between the ages of 25 and 34, indicating a younger geographic market. 93% travel to Belize for leisure. Segmented by their travel companions: 25% travel alone, 33% travel with spouse/partner only, and 27% travel with friends.

Top destinations for Canadian visitors while on their trip to Belize in 2019 include Caye Caulker (64%) and San Ignacio (35%), while 9% visited Hopkins while on their journey. 48% stay at a hotel/resort, and 41% stay at hostels/camping grounds. The average daily expenditure is \$92.04, 40% lower than the average daily spending per day across all geographic markets). Interestingly, however, Europeans tend to spend 43% to 67% more than average when traveling for Business or Wedding/honeymoon, respectively.

CARIBBEAN NEIGHBORS

Visitors to Belize from our Caribbean neighbors are the fourth largest geographic market. The VEMS study finds that most travel to Belize on **Business**. 48% of Caribbean visitors in 2019 had traveled to Belize before. 88% of Caribbean visitors to Belize in 2019 were relatively equally distributed within the age ranges of 25-64, with the highest concentration of visitors (25%) between the ages of 35 and 44. 61% travel to Belize for leisure, whereas other geographic markets have noted less than 9% as this travel purpose. Segmented by their travel companions: 59% travel alone, and 26% travel with co-workers.

Top destinations for Caribbean visitors while on their trip to Belize in 2019 include Belize City (64%) and Belmopan^{xxvii} (14%), while 3% visited Hopkins while on their journey. 76% stay at a hotel/resort. The average daily expenditure is \$175.92, which is greater than the daily average for all geographic markets.

A.2.1.2. SPECIAL-INTEREST MARKETS

LEISURE

79% of all tourists traveling to Belize in 2019 for Leisure were relatively equally distributed within the age ranges of 25-64, with the highest concentration of visitors (28%) between 25 and 34. Top destinations for Leisure travelers while on their trip to Belize in 2019 include Ambergris Caye (40%), Caye Caulker (33%), and San Ignacio (20%), while 8% visited Hopkins while on their trip. 62% stay at a hotel/resort, and 15% stay at a hostel/camping ground. The average daily expenditure is \$155.86.

WEDDING/HONEYMOON

74% of all tourists traveling to Belize in 2019 for Wedding/Honeymoon were between 25-44, with the highest concentration (53%) between 25 and 34. Top destinations for Wedding/Honeymoon travelers while on their trip to Belize in 2019 include Ambergris Caye (44%), Caye Caulker (18%), Hopkins (17%), and San Ignacio (16%). 86% stay at hotels/resorts. The average daily expenditure is 196.81.

BUSINESS/OFFICIAL

85% of all tourists traveling to Belize in 2019 for Business were relatively equally distributed within the age ranges of 25-64. The highest concentration in the two age ranges was between 35-44 (24%) and 45-44 (25%). Top destinations for Business travelers while on their trip to Belize in 2019 include Belize City (51%), Belmopan (14%), and Ambergris Caye (14%), while 5% visited Hopkins while on their trip. 76% stay at a hotel/resort, and 11% at bed and breakfasts. The average daily expenditure is \$208.67

PRE-PAID PACKAGES

20% of visitors traveled to Belize on a pre-paid package booked through travel agencies/tour operators (29%) or via a website (48.2%). Those who traveled to Belize on a pre-paid package spent 17% more than those who did not. The highest paying geographic markets were from the United States and Canada, followed closely by those from the Caribbean and South America. Visitors from the Caribbean, however, spend more on non-pre-paid packages.

A.2.2.A – CLUSTER MEMBERS

<p><u>DANGRIGA - WEYU</u></p> <ul style="list-style-type: none"> • Austin Rodriguez Drumming School Why Not Island • Garinagu Crafts Gallery • Tuani Garifuna Culture Restaurant • Gulisi Garifuna Museum • Mercy Sabal’s Garifuna Cultural Treasures • Pal’s Guesthouse • Pen Cayetano Studio and Art Gallery • Ruthie’s Cabanas • Sabal’s Cassava Food Products 	<p><u>HOPKINS - WEYU</u></p> <ul style="list-style-type: none"> • Palmento Grove Eco-Cultural Lodge • Dunbei Yuremei Drumming and Drum Artisanry • Lebeha Drumming School • Garimaya Gift Shop • Hopkins Weddings • Sandpiper Beach Cabins • Castillo Beach • Herbal Healers • Garifuna Republics • Baba Coleman Drum Making • The Right Touch
<p><u>HOPKINS - HATI</u></p> <ul style="list-style-type: none"> • Hopkins Auto Rental • Kulcha Tours • Out Da Box Films • Hopkins Printing Studio • D’s Hostel & Laundry • Noewel Fishing Tours • Belize Cultural Adventure Travel Services • Get To Know Belize • Golden Gift Shop and Tours • Gems Photo • Seamore Dive Shop • J & D Tours 	<p><u>HOPKINS - WARUGUMA</u></p> <ul style="list-style-type: none"> • Tugucina Gloria • Innie’s Restaurant • Queen Bean Restaurant • Garifuna Fabrics • Garifuna Soul Food Restaurant • Shadel’s Magic Pastry • Swinging Armadillo • Ella’s Cool Spot • Luba Laruga • Sandy Beach • Nice Cream • Li Bit A States • Northside Kitchen • Franzua’s Organics

A.2.2.B – SUPPORT ORGANIZATIONS

<ul style="list-style-type: none"> • Government of Belize • Ministry of Tourism • Belize Tourism Board • NICH • Dangriga Urban Farmers • Hopkins Local Business Association • Belize Afro-indigenous Eco-Cultural Institute • Belize Spa & Wellness Association • National Garifuna Council • Town and Village Councils

A.2.3. ANCILLARY DESCRIPTIONS OF KEY ATTRACTIONS

Pen Cayetano Studio and Art Gallery

Owned and operated by a prominent artistic family in Belize, this is a must-visit for Garifuna culture, art, and music to experience exhibitions and collections of paintings, Punta Rock, literature, workshops in art drumming – including the **Hayawadina mural**. Location: within Dangriga.

Gulisi Garifuna Museum

Exhibits include a history of the Garifuna people, a look at their customs and traditions, and may include a tour of a working garden filled with traditional herbs and plants of the Garifuna, and live displays of the Garifuna drums and traditional dance. Location: within Dangriga.

“Hayawadina Wayúnagu Mural”

Hayawadina Wayúnagu is the Garifuna name for Pen Cayetano’s most ambitious masterpiece. Literally, it means the “imagery of our ancestors.” Pen has been methodologically infusing into the second floor back wall of the Dangriga City Hall a rich, colorful tapestry of Garifuna culture, depicting persons who have inspired him in the fields of history, culture, spirituality, and artistic performance.

Drums of Our Fathers

The sculpture expresses Garifuna history, spirituality, reality and represents the past, present, and future of the Garifuna culture. Up to the 1930s, the turntable of Dangriga’s only railway was located at the “Y.” The monument was the idea and design by Sylvia Flores and Roy Cayetano. It was built/executed by Nigerian sculptor Stephen Okeke, who is residing in Belize City.

Garinagu Crafts Gallery

Part crafts store, part cultural museum, Garinagu Crafts Gallery is all about local and cultural things. The selection of items available includes drums, maracas, dolls, carvings, and various paintings. The more popularly sold items are wood carvings. The gallery is

Palmento Grove Garifuna Eco-Cultural & Fishing Lodge / Institute

A quaint, unique, and historic private cultural island destination sharing the Garifuna Culture through authentic culinary, overnight stay, and traditional Garifuna experiences. Location: An island off the coast of Hopkins.

Sabal’s Cassava Food Products Factory is one of the only formalized cassava processing plants in the area.

Nestled just outside of Dangriga, the Sabal ‘cassava factory’ is a family-owned business where the women produce cassava bread and other bi-products. At the same time, the men provide the raw product in the value chain process. It is the only commercial farm in Belize that produces such products. Distance from Hopkins: 18 mi. (28 min); Distance from Dangriga: 3.6 mi (12 min)

Sacred Heart Catholic Church

In 1867 the Sacred Heart of Jesus was founded in Stann Creek Town (now Dangriga). A fire destroyed the church, and it was rebuilt in the 50s. The interior has a station of the cross and several murals, sketched and painted by a Mexican artist. Late Garifuna artist Benjamin Nicholas did the completion of the artwork. Visitors can contact the office of the parish to view the magnificent artwork.

Tuani Garifuna Cultural Restaurant:

Tuani is the only restaurant that offers authentic Garifuna food as its core menu. Authentic traditional Garifuna cuisine is typically only made at home, catered, or for sale via order. Location: within Dangriga. Note that there are restaurants in Hopkins as well with traditional food

“Thomas Vincent Ramos Monument,” by Stephen Okeke

Thomas Vincent Ramos, commonly known as T. V. Ramos (17 September 1887 - 13 November 1955), was a Belizean civil rights activist who promoted the interests of the Garifuna people and is now considered a national hero. In 1940, as leader and spokesman of the Garifuna people along with Pantaleon Hernandez and Domingo Ventura, he approached the governor of the colony. He

open from 9:30 a.m. to 6:00 p.m. Monday through Friday.

GariMaya Gift Shop:

This gallery and craft display is a one-stop must-visit gift shop for hand-made and other arts, crafts, and souvenirs from the local area and other parts of Belize. Which include wood carving, paintings, jewelry, textiles, drums, and products such as hot sauces. Location: within Hopkins.

Marie Sharp Fine Foods (Hot Sauce Factory)

Marie Sharp is a local icon, a true Belizean, and a fully Belizean Business. Marie Sharp is most well-known for its many pepper sauces nationally and internationally. Her production facility hires mostly women and directly supports the local community by purchasing local farmers' production. Distance from Hopkins: 18 mi. (27min)

Distance from Dangriga: 8 mi. (15 min)

Mayflower Bocawina National Park

Located within the park is the Longest Zipline in Belize, five different waterfalls, and unexcavated Mayan ruins. The park is a birdwatcher's playground, with more than 290 species of birds identified in the area. A must-visit for adventure seekers and outdoor lovers staying in the area for waterfall repelling, ziplining, and hiking (day and night hikes). Distance from Hopkins: 13 mi, (28 min); Distance from Dangriga: 15 mi (28 min)

The Maya Center

Visitors can appreciate how the ancient Mayans made chocolate and purchase authentic organic Belizean chocolate. For those more adventurous, visitors can arrange a farm-to-factory tour, which includes a trip to the cacao plantation ending with a hands-on culinary experience making chocolate with master indigenous chocolatiers. Distance from Hopkins: 13 miles (22 min); Distance from Dangriga: 24 miles (36 min)

asked for the establishment of a public and bank holiday to observe the Garifuna arrival in Belize. The request was granted and the Carib Disembarkation Day, later named Garifuna Settlement Day. Location: the statue stands at the junction of Commerce and Front Streets in Dangriga

Maya Adventure

Visitors can take family photos at the top of a mock Mayan temple, ride ATVs in the lush jungle viewing birds and other wildlife, then picnic alongside a beautiful waterfall.

Events in Dangriga and Hopkins

19th of November Celebrations

Highlighting the arrival of the Garinagu. The Chaka competition is another highlight in November.

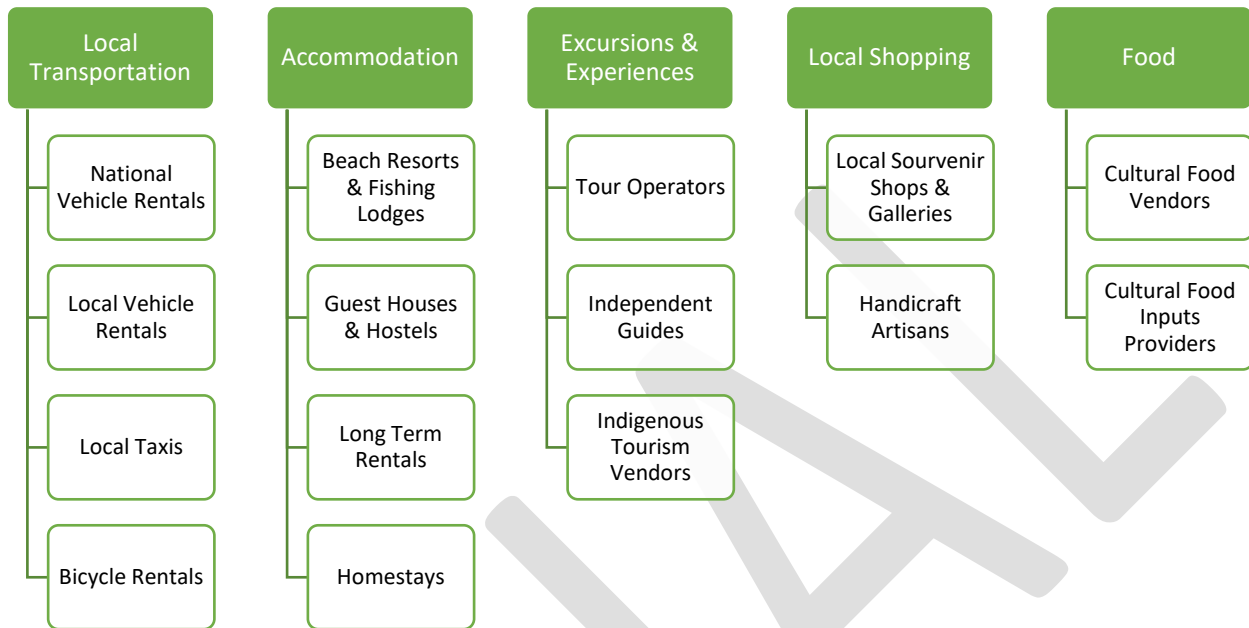
Christmas and New Year are celebrated with masked and costumed dancers parading in the streets performing the Chárikánári (cow dance) and the Wanaragua or Jankunu dance. The annual Wanaragua dance competition in December is a beautiful show to attend.

On Christmas and New Year Eve, ask for the Grandball and watch lancers, waltz, and foxtrot performed by highly dressed dancers

Other Festivals include:

The **Wanaragua Festival** (November/December); The **Belize International Indigenous Parranda Arts & Music Festival**, **Elijio Beni Festival**, **Habinaha Wanaragua**, **Shaka Competition**, **Grandball**, **Charikanari & Wanaragua**

A.2.4. VALUE CHAIN LOCAL PROVIDER DETAILS



2.5. PLACES OF INTEREST IN BELIZE

2019	Places of Interest Visited by Purpose of Visit							
	Vacation/ leisure	Wedding/ honey moon	Business/ Official	Visiting friends/ relative(s)	Religion/ Health/ Education	Other	DK/NS	Total
Archaeological & Maya sites	37.5%	49.7%	20.4%	21.0%	50.3%	38.2%	50.0%	37.1%
National Parks/Reserves	33.7%	37.3%	10.7%	17.6%	24.6%	19.6%	50.0%	32.0%
Historical sites/Museums	7.8%	6.9%	3.7%	6.7%	13.1%	7.8%	50.0%	7.7%
Wildlife Sanctuaries	12.5%	13.3%	6.0%	10.5%	18.3%	13.7%	50.0%	12.4%
Barrier Reef	62.5%	64.5%	14.4%	16.8%	36.3%	35.3%	100.0%	57.9%
Blue Hole	10.3%	9.3%	3.1%	7.5%	4.1%	4.9%	50.0%	9.7%
Other Marine Protected areas	25.6%	22.4%	5.2%	5.5%	8.7%	19.6%	0.0%	23.3%
Casino	2.6%	3.1%	3.4%	4.4%	0.0%	2.0%	0.0%	2.7%
Rainforest	21.1%	33.5%	9.2%	9.5%	14.5%	20.6%	0.0%	20.5%
Agricultural Site/Farm	3.8%	6.0%	6.0%	6.1%	9.0%	5.9%	0.0%	4.2%
Factory/Mill	1.1%	2.4%	2.9%	1.0%	3.6%	0.0%	0.0%	1.3%
Religious festival/event	1.2%	1.3%	1.6%	7.1%	21.9%	5.9%	0.0%	2.2%
Cultural event	3.4%	2.4%	5.2%	6.9%	8.2%	5.9%	0.0%	3.8%
Other	5.1%	4.9%	9.2%	10.5%	15.0%	13.7%	50.0%	5.9%
None	11.3%	11.1%	48.7%	38.8%	13.7%	24.5%	0.0%	14.0%
DK/NS	88.7%	88.9%	51.3%	61.2%	86.3%	75.5%	100.0%	86.0%

2019	Places of Interest Visited by Country/Region of Origin									
	USA	CANADA	EUROPE	CARIBBE AN	CENTRAL AMERICA	SOUTH AMERICA	OCEANIA	OTHER	DK/NS	Average
Archaeological & Maya sites	36.9%	42.7%	40.5%	23.8%	13.8%	21.7%	41.0%	25.1%	28.6%	37.1%
National Parks/Reserves	32.4%	37.2%	32.2%	12.5%	17.0%	16.0%	33.5%	19.8%	21.4%	32.0%
Historical sites/Museums	7.5%	9.0%	8.4%	12.5%	6.3%	6.6%	5.2%	8.8%	14.3%	7.7%
Wildlife Sanctuaries	12.6%	16.3%	11.6%	10.0%	6.9%	4.7%	7.5%	9.7%	7.1%	12.4%
Barrier Reef	55.7%	62.0%	70.9%	8.8%	24.5%	59.4%	78.3%	45.4%	50.0%	57.9%
Blue Hole	9.0%	12.2%	11.6%	3.8%	3.8%	15.1%	12.3%	12.8%	7.1%	9.7%
Other Marine Protected areas	22.7%	26.7%	26.0%	3.8%	10.7%	26.4%	27.4%	24.2%	14.3%	23.3%
Casino	3.0%	2.9%	1.3%	6.3%	1.9%	1.9%	2.4%	1.3%	7.1%	2.7%
Rainforest	21.0%	24.4%	20.7%	10.0%	9.4%	6.6%	17.5%	7.5%	21.4%	20.5%
Agricultural Site/Farm	4.5%	5.1%	3.1%	6.3%	5.0%	4.7%	.9%	.4%	0.0%	4.2%
Factory/Mill	1.4%	1.4%	1.1%	3.8%	1.3%	0.0%	.5%	1.3%	0.0%	1.3%
Religious festival/event	2.6%	1.4%	1.1%	2.5%	1.3%	1.9%	0.0%	1.3%	7.1%	2.2%
Cultural event	4.3%	3.7%	1.9%	7.5%	2.5%	2.8%	.9%	3.1%	14.3%	3.8%
Other	6.7%	5.0%	2.7%	8.8%	12.6%	2.8%	1.9%	5.3%	7.1%	5.9%
None	14.7%	13.1%	7.1%	51.3%	32.1%	19.8%	4.7%	21.6%	28.6%	14.0%
DK/NS	85.3%	86.9%	92.9%	48.8%	67.9%	80.2%	95.3%	78.4%	71.4%	86.0%

A.2.6. PARTICIPATION IN ACTIVITIES

2019	2019									
	USA	CANADA	EUROPE	CARIBBEAN	CENTRAL AMERICA	South America	Oceania	Other	DK/NS	Average
Snorkeling	61.3%	66.3%	75.9%	12.5%	30.2%	62.3%	83.0%	55.5%	57.1%	63.4%
Diving	16.9%	17.3%	17.7%	6.3%	8.2%	17.9%	18.9%	15.9%	28.6%	16.9%
Cave exploration/ Tubing	25.4%	32.8%	25.0%	7.5%	6.9%	9.4%	34.9%	15.4%	35.7%	25.3%
Canoeing/Kayaking	15.3%	19.1%	13.3%	2.5%	3.8%	9.4%	8.0%	5.7%	14.3%	14.6%
Sailing	10.4%	11.3%	11.1%	6.3%	1.9%	7.5%	18.9%	7.5%	21.4%	10.5%
Fishing	21.7%	13.9%	8.1%	7.5%	7.5%	1.9%	10.8%	4.8%	35.7%	18.1%
Island Tour	14.9%	14.4%	16.7%	11.3%	10.1%	20.8%	18.9%	15.9%	14.3%	15.2%
Horse-back riding	2.8%	2.9%	2.0%	1.3%	0.0%	0.9%	0.9%	1.3%	0.0%	2.6%
Jungle trekking	13.6%	16.9%	15.4%	3.8%	6.3%	5.7%	9.9%	4.8%	14.3%	13.6%
Ziplining/ Aerial trekking	9.7%	7.0%	2.5%	2.5%	0.0%	0.0%	0.5%	1.8%	0.0%	7.8%
Birding	6.3%	7.7%	7.8%	3.8%	3.8%	4.7%	1.9%	4.4%	7.1%	6.4%
Camping	1.1%	3.0%	4.0%	1.3%	1.9%	6.6%	3.8%	1.8%	0.0%	1.8%
OTHER	7.9%	7.3%	3.3%	15.0%	3.8%	1.9%	1.9%	3.5%	0.0%	6.9%
NONE	13.3%	13.4%	8.8%	58.8%	42.8%	22.6%	4.7%	26.4%	28.6%	13.6%
DK/NS	0.7%	0.9%	1.4%	2.5%	5.7%	2.8%	0.9%	3.5%	0.0%	1.0%

Participation in Activities by Country/Region of Origin

2019	2019								
	Vacation/leisure	Wedding/honeymoon	Business/Official	Visiting friends/relative(s)	Religion/Health/Education	Other	DK/NS	Average	
Snorkeling	65.5%	75.1%	16.9%	18.3%	47.9%	40.0%	100.0%	61.3%	
Diving	18.9%	13.4%	5.6%	6.4%	2.3%	14.7%	50.0%	16.9%	
Cave exploration/ Tubing	26.6%	41.1%	4.3%	10.1%	18.9%	13.3%	50.0%	25.4%	
Canoeing/ Kayaking	16.2%	27.2%	3.9%	6.4%	6.0%	1.3%	0.0%	15.3%	
Sailing	11.4%	9.4%	2.2%	6.6%	2.6%	4.0%	50.0%	10.4%	
Fishing	23.6%	21.2%	3.9%	14.3%	7.2%	16.0%	50.0%	21.7%	
Island Tour	15.4%	18.6%	6.9%	10.6%	14.3%	6.7%	0.0%	14.9%	
Horse-back riding	2.8%	5.8%	.9%	1.3%	2.0%	4.0%	0.0%	2.8%	
Jungle trekking	14.1%	19.6%	3.9%	5.8%	12.0%	12.0%	0.0%	13.6%	
Ziplining/ aerial trekking	9.8%	19.9%	.4%	4.2%	8.9%	8.0%	50.0%	9.7%	
Birding	6.9%	5.2%	.4%	3.2%	3.4%	6.7%	0.0%	6.3%	
Camping	1.1%	.5%	0.0%	.5%	4.0%	0.0%	0.0%	1.1%	
Other	7.2%	5.2%	14.3%	12.2%	13.2%	18.7%	0.0%	7.9%	
None	9.6%	8.1%	58.4%	43.8%	23.5%	26.7%	0.0%	13.3%	
DK/NS	.5%	.3%	1.3%	2.9%	1.7%	2.7%	0.0%	.7%	

Participation in Activities by Purpose of Visit

A.2.7. VISITOR EXPENDITURE DETAILS:

A.2.7.1. VISITOR INCOME

The VEMS data reveals that 43% of all visitors to Belize in 2019 are in the middle-income bracket, 38% in the upper-income bracket, and 19% in the lower-income bracket. Markets (countries/regions) with the highest percentage of persons in the upper-income brackets are the United States and the Caribbean: 41%^{xxviii} and 31%, respectively. Markets with the highest percentage of persons in the lower-income brackets are Central America, South America, Europe, and Oceania: 56%, 52%, 40%, and 32%, respectively. 70% of European visitors are within the lower- and middle-income brackets.

Regarding backpackers, the VEMS Survey data does not explicitly provide for a 'backpacker' type category of traveler. Therefore, we will consider backpackers to be within the lower-income bracket for the purpose of this document. This is not necessarily a reflection of their assumed income level, but instead a reflection of which income bracket backpackers are most likely to emulate. For this document, we will utilize the data presented and qualitative observations that European visitors are the most statistically likely to have backpacker type spending habits and budgets within Belize.

A.2.7.2. VISITOR SPENDING HABITS:

The average daily expenditure for overnight visitors in 2019 was \$159.93 per person per day. Per day expenditures for winter and summer seasons vary slightly, where expenditures are approx. 3.5% greater in the winter on average. Visitors from the United States and the Caribbean are the only two markets that spend more than the average per person day expenditure of \$159.93, by 14% and 9% more. Visitors from Europe and Central America spend the least per person per day, 41% and 37% less than the average, respectively.

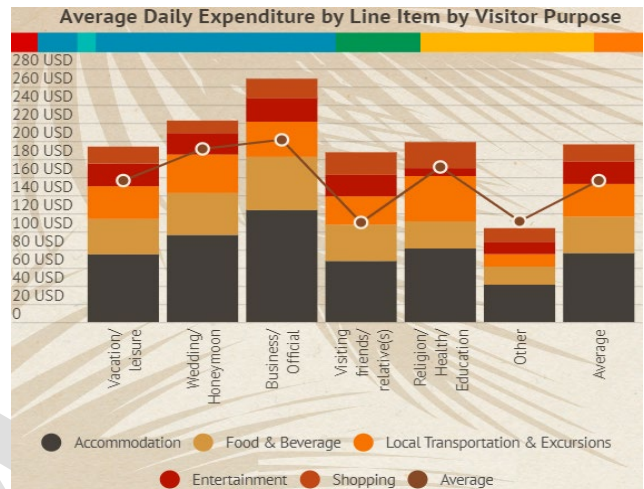


Figure 2 - Average Daily Expenditure Type by Purpose of Travel

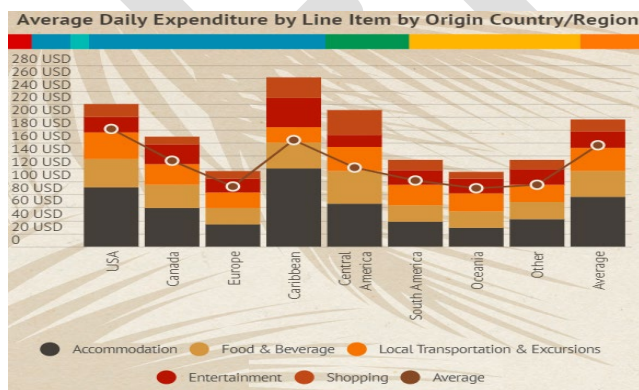


Figure 3 - Average Daily Expenditure Type by Country – B

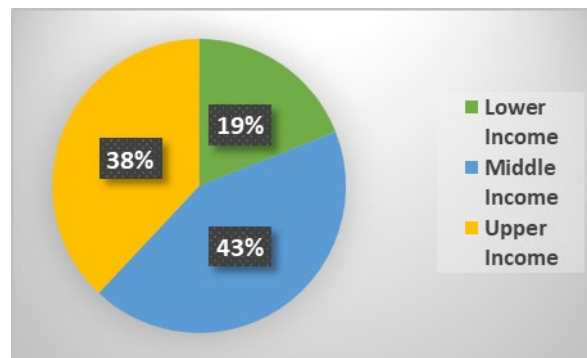


Figure 4 - Income Levels for International Overnight Visitors

	Winter	Summer	Average
UNITED STATES	\$187.12	\$177.87	\$182.05
CANADA	\$136.85	\$147.67	\$141.90
EUROPE	\$96.76	\$92.09	\$94.17
CARIBBEAN	\$174.94	\$173.61	\$173.92
CENTRAL AMERICA	\$106.13	\$128.72	\$117.15
SOUTH AMERICA	\$103.62	\$117.99	\$110.19
OCEANIA	\$96.62	\$102.66	\$100.21
OTHER COUNTRIES	\$109.41	\$116.10	\$113.47
DK/NS	\$143.06	\$176.91	\$159.98
Average	\$162.88	\$157.47	\$159.93

Figure 5 - Average Daily Expenditure by Country per Season & on Average

	Vacation/ leisure	Wedding / Honey moon	Business/ Official	Visiting friends/ relative(s)	Religion/ Health/ Education	Other	Average
Accommodation	\$73.07	\$97.73	\$127.83	\$57.23	\$69.80	\$37.63	\$75.01
Food & Beverage	\$39.42	\$48.74	\$52.31	\$35.26	\$30.08	\$24.63	\$39.74
Local Transportation & Excursions	\$66.74	\$80.73	\$43.06	\$42.93	\$43.56	\$32.10	\$65.37
Entertainment	\$25.45	\$26.89	\$33.76	\$19.87	\$9.93	\$15.77	\$25.14
Shopping	\$18.61	\$20.01	\$31.48	\$25.72	\$27.81	\$27.62	\$19.50
AVERAGE	\$155.86	\$196.81	\$208.67	\$105.09	\$156.84	\$115.06	\$156.45

Figure 6 - Average Daily Expenditure Type by Purpose of Travel - A (Tabular)

	2019									
	USA	CANADA	EUROPE	CARIB BEAN	CENTRAL AMERICA	SOUTH AMERICA	OCEANIA	OTHER	DK/NS	Total
Vacation/ leisure	\$184.59	\$142.92	\$92.25	\$153.30	\$121.55	\$104.53	\$96.20	\$108.24	\$160.53	\$159.53
Wedding/ Honeymoon	\$210.66	\$142.68	\$134.80		\$83.33	\$130.42	\$160.42	\$64.81		\$199.20
Business/ Official	\$213.85	\$198.53	\$157.18	\$179.75	\$249.89	\$237.32	\$316.67	\$246.79	\$158.33	\$207.11
Visiting friends/ relative(s)	\$113.19	\$82.99	\$84.96	\$186.21	\$61.76	\$40.00		\$69.40		\$105.84
Religion/ Health/ Education	\$155.30	\$203.57	\$56.17		\$23.08					\$154.48
Other	\$131.81	\$97.28	\$75.83	\$158.33	\$43.67	\$125.00				\$116.51
DK/NS	\$420.00									\$420.0
Total	\$182.05	\$141.90	\$94.17	\$173.92	\$117.15	\$110.19	\$100.21	\$113.47	\$159.98	\$159.93

Figure 7 - Average Daily Expenditure by Purpose of Visit Segmented by Country

2019		USA	CANADA	EUROPE	CARIB BEAN	CENTRAL AMERICA	SOUTH AMERICA	OCEANIA	OTHER	DK/NS	Average
Accommodation		\$88.82	\$56.57	\$34.87	\$126.53	\$65.00	\$45.06	\$37.31	\$44.79	\$43.81	\$75.01
Food & Beverage		\$44.23	\$35.19	\$25.85	\$37.40	\$41.07	\$28.48	\$25.83	\$29.44	\$32.76	\$39.74
Local Transportation & Excursions		\$41.40	\$33.18	\$25.09	\$19.99	\$31.79	\$30.16	\$33.03	\$40.36	\$16.55	\$37.74
Entertainment		\$25.65	\$28.87	\$22.06	\$30.42	\$23.56	\$26.88	\$22.66	\$22.69	\$21.83	\$25.14
Shopping		\$20.52	\$14.58	\$12.18	\$29.35	\$28.89	\$17.40	\$10.78	\$17.04	\$80.56	\$19.50
AVERAGE		\$180.75	\$136.18	\$92.04	\$175.92	\$118.21	\$107.02	\$98.91	\$110.12	\$145.73	\$156.45

Figure 8 - Average Daily Expenditure Type by Country – A (Tabular)

AVERAGE DAILY EXPENDITURES

	UNITED STATES	CANADA	EUROPE	CARIBBEAN	VACATION	HONEYMOON / WEDDING	BUSINESS / OFFICIAL	EXPENDITURE CATEGORY
Accommodation	88.82	56.57	34.87	126.53	73.07	97.73	127.83	75.01
Food & Beverage	44.23	35.19	25.85	37.40	39.42	48.74	52.31	39.74
Local Transp & Excursions	41.40	33.18	25.09	19.99	66.74	80.73	43.06	37.74
Entertainment	25.64	28.87	22.06	30.42	25.45	26.89	33.76	25.14
Shopping	20.52	14.58	12.18	29.35	18.61	20.01	31.48	19.50
Total	180.75	135.18	92.04	175.92	155.86	196.81	208.67	156.45

AVG DAILY EXPENDITURES - SOLITARY PLACES STAYED

	UNITED STATES	CANADA	EUROPE	CARIBBEAN	VACATION	HONEYMOON / WEDDING	BUSINESS / OFFICIAL	EXPENDITURE CATEGORY
Ambergris Caye	201.99	163.54	157.50	202.78	-	-	-	197.88
Belize city	173.77	174.60	129.28	179.38	-	-	-	164.24
Belmopan	165.84	295.42	136.26	182.14	-	-	-	168.42
Caye Caulker	162.22	121.03	89.95	150.00	-	-	-	123.62
Hopkins	221.42	227.55	151.81	50.00	-	-	-	217.34
Placencia	200.48	181.25	117.55	227.66	-	-	-	189.85
San Ignacio	163.00	128.34	82.72	177.38	-	-	-	134.04
Stann Creek	186.49	177.65	-	-	-	-	-	175.82
Other								

AVG DAILY EXPENDITURES - MULTIPLE LOCATIONS

	UNITED STATES	CANADA	EUROPE	CARIBBEAN	VACATION	HONEYMOON / WEDDING	BUSINESS / OFFICIAL	EXPENDITURE CATEGORY
Ambergris Caye	192.03	153.64	128.37	173.12	183.80	205.67	215.22	185.73
Hopkins	191.43	175.52	90.57	55.77	171.06	194.93	207.49	145.98
Placencia	183.15	143.96	93.28	175.47	168.70	175.92	237.02	142.66
Stann Creek	173.43	177.65	80.79	-	167.38	228.17	138.17	119.64
Other								
Belize city	160.92	131.31	99.86	175.12	137.45	158.95	212.96	171.36
San Ignacio	158.87	128.34	76.72	144.80	125.77	155.74	186.52	127.21
Caye Caulker	152.34	120.33	84.59	94.59	118.32	153.31	150.46	161.27
Belmopan	152.27	179.53	82.22	183.34	139.30	205.48	217.17	167.39

A.2.8. BELIZE MARKET DATA^{xxix}

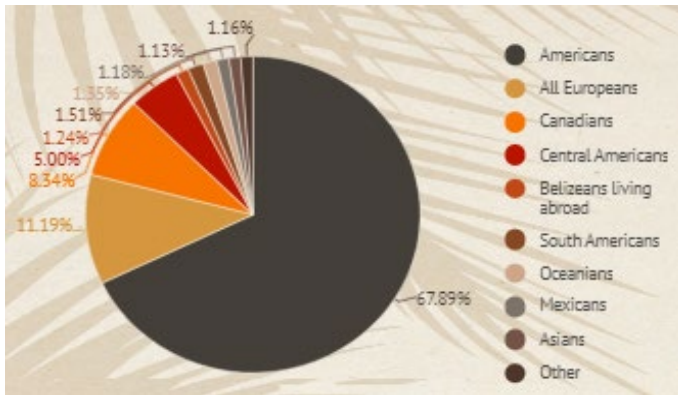


Figure 9 - Overnight Tourism Arrivals By Origin

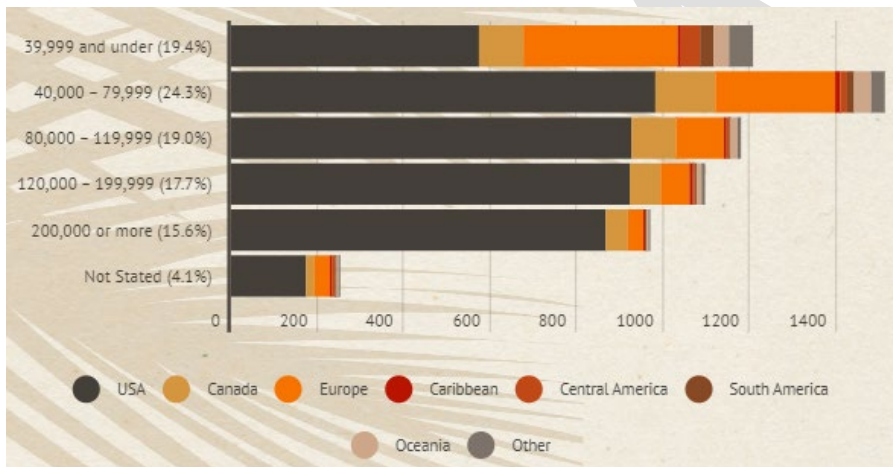
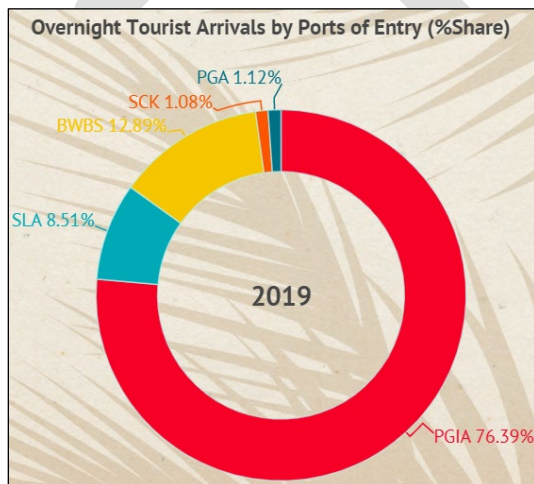


Figure 10 - Income Bracket by Country – A (visual)



ACCOMMODATION TYPE BY COUNTRY/REGION

	UNITED STATES	CANADA	EUROPE	CARIBBEAN	VACATION	HONEYMOON/WEDDING	BUSINESS / OFFICIAL
Hotel / Resort	66.4%	49.7%	47.8%	76.3%	61.9%	85.6%	76.4%
Bed & Breakfast	7.8%	16.2%	20.1%	7.5%	10.7%	6.2%	11.0%
Hostel / Camping Ground	4.6%	24.2%	41.4%	3.8%	14.8%	2.2%	8.0%
Rented Living Space (Airbnb/VRBO/ Couchsurfing)	12.6%	16.2%	5.8%	6.3%	12.3%	9.1%	3.1%
Lodge / Cabin	4.9%	6.6%	7.4%	1.3%	5.3%	6.0%	2.9%

PLACES STAYED BY COUNTRY

	UNITED STATES	CANADA	EUROPE	CARIBBEAN	VACATION	HONEYMOON/WEDDING	BUSINESS / OFFICIAL	OVERALL
Ambergris Caye	42.7%	38.9%	18.5%	11.3%	39.6%	44.3%	17.5%	36.9%
Belize city	17.0%	19.6%	18.7%	63.8%	15.7%	12.0%	51.3%	18.2%
Belmopan	-	-	-	13.8%	-	-	14.1%	4.1%
Caye Caulker	20.5%	43.1%	64.4%	10.0%	33.4%	17.7%	7.9%	30.6%
Hopkins	8.2%	10.1%	8.6%	2.5%	8.0%	17.3%	5.0%	12.8%
Placencia	13.5%	14.6%	11.2%	7.5%	13.3%	12.2%	8.6%	12.8%
San Ignacio	14.7%	28.8%	34.5%	7.5%	20.3%	15.7%	8.4%	19.2%
Stann Creek	4.0%	2.9%	2.3%	3.8%	2.8%	3.1%	3.4%	3.5%
Other								

LENGTH OF STAY - MULTIPLE DESTINATIONS

	UNITED STATES	CANADA	EUROPE	CARIBBEAN	VACATION	WEDDING/HONEY-MOON	BUSINESS / OFFICIAL	AVERAGE
Ambergris Caye	6.47	7.72	6.71	6.17	-	-	-	6.51
Belize city	6.62	8.07	5.91	4.81	-	-	-	6.36
Belmopan	7.52	7.81	6.72	6.00	-	-	-	7.19
Caye Caulker	6.59	7.28	5.17	7.50	-	-	-	5.92
Hopkins	6.90	8.06	7.74	8.50	-	-	-	7.12
Placencia	7.19	8.12	7.31	6.50	-	-	-	7.20
San Ignacio	7.17	7.94	6.20	7.25	-	-	-	6.83
Stann Creek Other	7.11	8.67	7.33	-	-	-	-	7.12
OVERALL	6.39	7.38	5.20	5.10	5.96	6.48	4.18	6.10

LENGTH OF STAY - ONE DESTINATION

	UNITED STATES	CANADA	EUROPE	CARIBBEAN	VACATION	WEDDING/HONEY-MOON	BUSINESS / OFFICIAL	AVERAGE
Ambergris Caye	6.01	6.96	5.18	4.00	-	-	-	5.97
Belize city	4.82	4.67	3.26	3.95	-	-	-	4.35
Belmopan	5.35	5.00	5.00	5.00	-	-	-	5.00
Caye Caulker	5.48	5.94	3.73	2.00	-	-	-	4.53
Hopkins	6.17	7.42	5.63	4.00	-	-	-	6.14
Placencia	6.28	6.89	4.67	4.50	-	-	-	6.10
San Ignacio	5.22	4.89	2.42	5.00	-	-	-	4.37
Stann Creek Other	6.18	10.50	-	-	-	-	-	6.18

AGE RANGES BY COUNTRY

	UNITED STATES	CANADA	EUROPE	VACATION	HONEYMOON/WEDDING	BUSINESS / OFFICIAL
-18	0%	0%	0%	0%	0%	0%
18-24	8%	11%	18%	10%	8%	2%
25-34	22%	34%	48%	28%	53%	16%
35-44	19%	12%	12%	17%	21%	24%
45-54	20%	16%	9%	17%	8%	24%
55-64	19%	16%	8%	16%	4%	19%
65+	13%	10%	4%	11%	4%	12%

REPEAT / FIRST TIME VISITORS

	UNITED STATES	CANADA	EUROPE	VACATION	HONEYMOON/WEDDING	BUSINESS / OFFICIAL
First Time Visitors	67.20%	73.10%	90.70%	-	-	-
Repeat Visitors	32.70%	26.80%	9.20%	-	-	-

SOURCES OF INFORMATION

	UNITED STATES	CANADA	EUROPE	VACATION	HONEYMOON/WEDDING	BUSINESS / OFFICIAL
Friends / Relatives	47.6%	47.3%	38.5%	45.2%	49.7%	26.2%
Website	26.9%	29.1%	27.4%	28.8%	32.2%	18.1%
Social Media	7.3%	10.0%	11.1%	9.2%	7.1%	5.2%
Travel Agent / Tour Operator	5.4%	3.0%	8.8%	6.1%	6.0%	3.4%
Print Media	2.9%	2.7%	6.6%	3.9%	1.1%	2.9%
Church	1.9%	0.6%	0.1%	0.9%	0.2%	0.5%
Employer / Job	1.6%	0.9%	1.2%	0.4%	0.9%	31.7%
Television	0.8%	0.9%	0.7%	0.9%	0.4%	0.0%

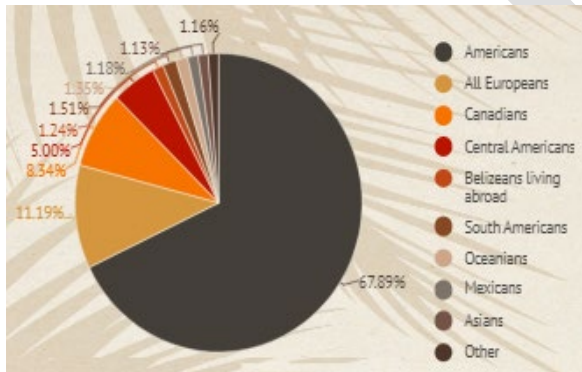
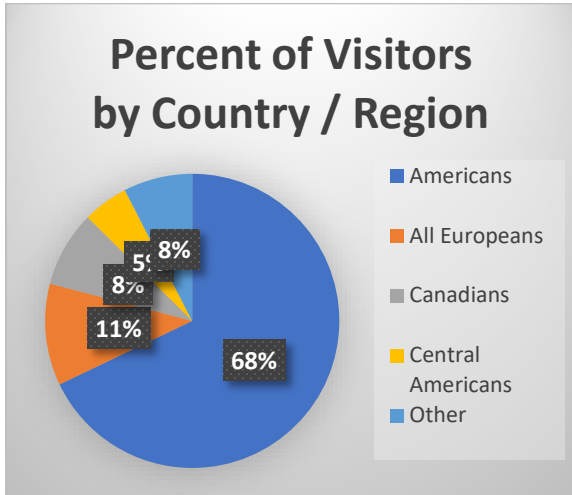
PURPOSE OF VISIT (IN%)

	UNITED STATES	CANADA	EUROPE
Vacation / Leisure	82.4%	89.9%	92.5%
Wedding / Honeymoon	4.7%	1.4%	2.6%
Business/Official	2.9%	2.0%	2.4%
Visiting Friends/Family	4.7%	5.0%	1.5%
Religion/Health/Education	4.3%	0.9%	0.4%

TRAVEL COMPANIONS %

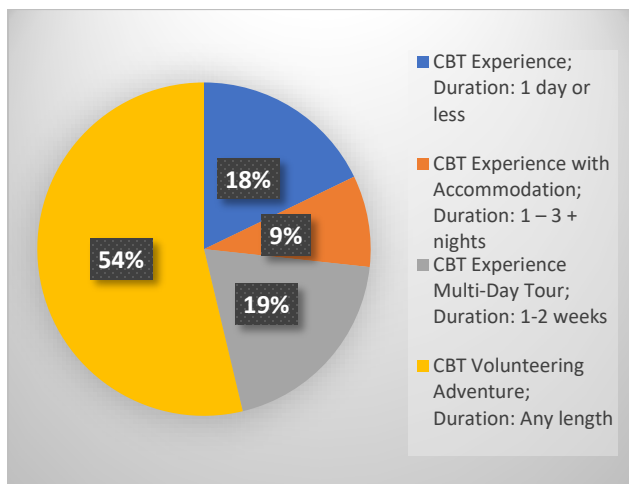
	UNITED STATES	CANADA	EUROPE
Nobody	14.4%	21.2%	25.3%

Spouse/Partner Only	39.0%	38.0%	32.8%
Family	22.1%	16.2%	11.4%
Friends	20.1%	22.8%	27.1%
Co-workers	2.0%	0.6%	0.9%



A.2.9. OTHER

TYPES OF CBT EXPERIENCES



A.3. ENDNOTES

- i. Antigua & Barbuda, The Bahamas, Barbados, Belize, Dominica, Grenada, Guyana, Jamaica, Saint Kitts & Nevis, Saint Lucia, Saint Vincent & the Grenadines, Suriname, Trinidad & Tobago
- ii. WOFs are single proprietary or majority women owned firms. That is, if the firm is owned by only one person, and that person is a woman, it is a woman owned firm. If it is owned by several people, more than 50% of shares have to be owned by women for it to be a WOF.
- iii. The CBT toolkit and training manuals are available at <https://competecaribbean.org/featured/community-based-tourism-toolkit>
- iv. BTB Travel & Tourism Statistics Digest - 2019 - <https://infogram.com/overnight-tourist-arrivals-1hdw2j7kjq1x2l0> - Excerpt in Annexes.
- v. The Rise of Transformative Travel. Skift. 2018.
- vi. Conscious Travel Emerging as Yet Another Hot Luxury Travel Trend. Skift. Jan 15, 2019. <https://skift.com/2019/01/15/conscious-travel-emerging-as-yet-another-hot-luxury-trend/>
- vii. Here are 8 ways travel will change after the pandemic. National Geographic. Oct 5, 2020. <https://www.nationalgeographic.com/travel/2020/10/heres-how-covid-is-changing-travel-according-to-the-experts/>
- viii. This document is utilized throughout this document and will further be referred to as the “VEMS”, “VEMS Survey”
- ix. Percentages here indicate whether tourists travelled to this/these destinations while on their trip to Belize, i.e. tourists may have visited multiple destinations.
- x. Rented living spaces include those private spaces such as may be listed on Airbnb/ VRBO/ Couchsurfing
- .xi The Belize Tourism Board (BTB) classifies “overnight tourist arrivals” international visitors who spend more than 1 night in the country.
- xii. World Tourism Barometer. October 2020. UNWTO. <https://www.unwto.org/doi/epdf/10.18111/wtobarometereng.2020.18.1.6>
- xiii Belize – Ministry of Tourism - Tourism Destination Development Plan (2019) for Dangriga
- xiv Both Dangriga and Hopkins are in the Stann Creek District of Belize
- xv. Refer to Annex #”A.2.8. “Belize Market Data”; Excerpts from VEMS, 2019 Study.
- xvi. Belize – Ministry of Tourism - Tourism Destination Development Plan (2019) for Dangriga
- xvii Diversification Of Caribbean Tourism Experiences. 2019. Compete Caribbean, prepared by Euromonitor International.
- xviii Spectrum indicating tourism readiness from least prepared to most prepared: Emerging, Visitor Ready, Market Ready, Export Ready
- xix Sargassum is a genus of large brown seaweed (a type of algae) that floats in island-like masses and never attaches to the seafloor which causes a rotten-egg type smell as it degrades.
- xx Within the context of the Porter’s 5 forces assessment, the preceding will be referred to as ‘the industry’.
- xxi. Data from the Ministry of Tourism Concept Note Submitted to Compete Caribbean January 2020
- xxii Primarily, the signatories to the cluster partnership agreement, at other prospective cluster/trail members.
- xxiii. Treksoft is an online booking solution for day tour companies which integrates a centralized booking system that connects online and offline sales channels to simplify CBT product, experience, and accommodation management.
- xxiv. Compete Caribbean’s funding must be matched by at least 20% of the cost of the project by the cluster, of which a maximum of 50% may be in-kind (dedicated staff, equipment, etc.)
- xxv. Percentages here indicate whether tourists travelled to this/these destinations while on their trip to Belize, i.e. tourists may have visited multiple destinations.
- xxvi. Rented living spaces include those private spaces such as may be listed on Airbnb/ VRBO/ Couchsurfing
- xxvii. Whilst Belmopan is the legal capital of Belize, Belize City is still considered the economic capital of the country.
- xxviii. 41% of visitors from this market are within the upper income bracket.
- xxix. The following tables, figures, charts, and/or graphs include data that have been extracted to define geographic & special interest market segments in section 2.