

# COROZAL TOURISM DESTINATION DEVELOPMENT PLAN 2016-2020



SALAS, 2015

Prepared for:



MINISTRY OF TOURISM  
& CIVIL AVIATION

# **Corozal Tourism Destination Development Plan 2016-2020**

Prepared by:

**Osmany Salas**

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## *Vision Statement*

***A vibrant, family-friendly, nature-based, cultural destination with diverse tourism experiences and attractions developed in an equitable and sustainable manner***



Photo 1: Sailboat, Sarteneja Village

## *Goal Statements*

- 1. Highly improved standards and quality of tourism products and services in Corozal;***
- 2. Increased opportunities for equitable tourism benefits;***
- 3. Increased and sustained tourist arrivals and overnight stays in Corozal.***

## Acknowledgments

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# **Contents**

Acknowledgments .....	4
Acronyms .....	7
FOREWORD .....	8
SECTION 1: SETTING THE STAGE .....	9
1. Introduction .....	10
1.1 Background .....	10
1.2 The Local Tourism Committee .....	11
1.3 The TDDP Planning Process .....	12
2. The Corozal Tourism Market .....	13
2.1 Volume, types, segments, management & marketing .....	17
2.1.1 Volume .....	17
2.1.2 Types and segments .....	17
2.1.3 Main competitors, needs of target markets .....	19
2.1.4 Bottlenecks identified .....	20
SECTION 2: THE TDDP .....	22
3. The Planning Context .....	23
3.1 Key Elements of the External Environment Scan .....	23
3.2 Vision for Corozal's Tourism Industry .....	25
3.2.1 Vision Statement .....	25
3.2.2 Purpose Statements (Goals) .....	26
3.3 Objectives and Strategic Actions .....	29
3.3.1 Objective #1: Improve the Capacity of Tourism Service Providers and Front-Line Personnel .....	29
3.3.2 Objective #2: Develop tourism amenities and facilities at major tourism attractions .....	32
3.3.3 Objective #3: Develop and expand tourism excursion options in the District ...	36
3.3.4 Objective #4: Advocate for responsible development practices and use of natural resources .....	41
3.3.5 Objective #5: Build community awareness about the importance of tourism and its links to the environment and culture .....	43
3.3.6 Objective #6: Develop and implement multiplatform marketing strategies that promote Corozal's brand .....	46
3.4 Tourism Investment Project Ideas .....	50
3.4.1 Identification of Priority Infrastructure .....	50
3.4.2 Needs for Private Sector engagement .....	51
4. Coordination and Monitoring .....	51
SECTION 3: STRATEGIC OBJECTIVES AND ACTIONS .....	53
SECTION 4: IMPLEMENTATION SCHEDULE .....	57
ANNEXES .....	62
Annex 1 – LTC members and other stakeholders .....	63
Annex 2 – PESTE Analysis Results .....	64
Annex 3 – Map of Corozal District .....	70
Annex 4 – Quarterly Status Report Form .....	71

Annex 5 – Objective, Responsibilities and Targets (ORT) Report Form.....	72
Annex 6 – Selected References.....	73

### **List of Figures:**

Figure 1: Total number of overnight tourists to Corozal District 2006-2014.....	16
Figure 2: Vision, Goals and Key Objectives (Corozal TDDP).....	29
Figure 3: Strategic Objective 1 and Actions.....	30
Figure 4: Strategic Objective 2 and Actions.....	34
Figure 5: Strategic Objective 3 and Actions.....	39
Figure 6: Strategic Objective 4 and Actions.....	41
Figure 7: Strategic Objective 5 and Actions.....	44
Figure 8: Strategic Objective 6 and Actions.....	48

### **List of Tables:**

Table 1: Number of persons employed in tourism-related sectors for Corozal, 2013.....	15
Table 2: Types of visitors to Corozal.....	17
Table 3: Top activities by visitors to Corozal.....	18
Table 4: Bottlenecks hindering Corozal’s competitiveness.....	20
Table 5: Dashboard of indicators for Corozal.....	27
Table 6: Number of registered tour operators & guides 2004-2013, Corozal District.....	37
Table 7: Corozal priority infrastructure proposals.....	50

### **List of Boxes:**

Box 1 – The Wider Planning Context.....	23
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## Acronyms

B&B	Bed and breakfast
BHA	Belize Hotel Association
BTB	Belize Tourism Board
CEO	Chief Executive Officer
CHOC	Corozal House of Culture
COLCHA	Corozal Organization Leading Cultural Heritage and Arts
CTO	Chief Tourism Officer
EPP	Excursion Product Provider
FIT	Free and independent travelers
FTE	Full-time equivalent
GOB	Government of Belize
IADB	Inter-American Development Bank
LIP	Low income people
LOS	Length of stay
LTC	Local Tourism Committee
MSME	Medium, small and micro enterprises
MTCCA	Ministry of Tourism, Culture and Civil Aviation
NICH	National Institute of Culture and History
NSTMP	National Sustainable Tourism Master Plan 2030
PA	Protected area
PPDU	Planning and Project Development Unit
SACD	Sarteneja Alliance for Conservation and Development
SCMA	Shipstern Conservation and Management Area
SME	Small and medium enterprises
STP	Sustainable Tourism Program
TC	Technical Cooperation
TDDP	Tourism destination development plan
VEMS	Visitor expenditure and motivation survey
VFR	Visiting friends and relations

## FOREWORD

In 2012, the Ministry of Tourism and Civil Aviation (**MTCA**) embarked on an unprecedented journey for Belize, as we began the implementation of the country's very first National Sustainable Tourism Master Plan (**NSTMP**). Since then, the Government of Belize, through its Ministry of Tourism, and its Belize Tourism Board, has pushed forward with the enhancement of its tourism sector, in areas of Marketing, Governance, Product Development, Destination Planning, Infrastructure Development, and Quality Assurance, to name a few.

One key area of intervention has been the modest recommendation by the NSTMP challenging our industry to not only continue along its trend of positive growth, but more importantly to engage in a participatory development path, and ensure that the benefits of this sector have more equitable presence throughout our nation. This paradigm shift calls for newer, and commonly marginalized communities, to be integrated within the economic opportunities inherent to tourism, while remaining respectful of their social integrity, and mindful of the environmental challenges that contest our *status quo* of development. I am glad to say, that we have fully embraced this call to action.

It is under this mark, that in 2015 the Ministry of Tourism began the roll-out of a revolutionary platform, known as Local Tourism Committees (LTCs), within four of our priority emerging destinations. As a participatory mechanism, the LTCs provide an essential opportunity for the public, private and civil sector in our destinations to collaborate in the planning, development and monitoring of tourism development in their communities. Since 2015, we have established LTCs in the districts of Corozal and Toledo, in the island community of Caye Caulker, and convened a special planning group for the four adjacent protected areas in the Mountain Pine Ridge, Caracol, and Chiquibul Complex, in the Cayo District. The introduction of the committees has been well received by the communities, industry partners and destinations, and their impact has already generated tangible results in the development of destination-specific Tourism Development Plans. These plans not only align the strategic principles and recommendations of our National Sustainable Tourism Master Plan, but also integrate and highlight the tourism development priorities and vision of our local stakeholders. Most importantly, they serve as a tool for all of us to gauge our actions and to measure our ability to meet the challenge set by our NSTMP.

As Minister responsible for Tourism, it is my privilege to present to you the Tourism Development Plan for the Corozal District, and to reaffirm our commitment to continue building Tourism in Belize, through partnership and collaboration.

Yours in Tourism,

*Manuel Heredia*

Hon. Jose Manuel Heredia Jr.  
Minister of Tourism and Civil Aviation



## **SECTION 1: SETTING THE STAGE**

# 1. Introduction

## 1.1 *Background*

The National Sustainable Tourism Master Plan 2012 – 2030 (NSTMP), developed within the Inter-American Development Bank’s co-financed “Sustainable Tourism Program” (STP) and endorsed by Cabinet in 2012, is the overarching tourism policy and strategic planning instrument, and encompasses the strategic priorities of Horizon 2030, the national development plan for the country, as they relate to building a sustainable and responsible tourism product. The realization of the NSTMP will require considerable public policy support and complementary public and private investment and focuses on five core areas or macro programs: 1) governance, 2) sustainability and quality assurance, 3) tourism infrastructure, 4) marketing, and 5) tourism product development.

In this context, the Technical Cooperation (TC) “Support for Implementation of National Sustainable Tourism Master Plan” co-financed by the Inter-American Development Bank (IADB) supports the Government of Belize to foster a positive institutional environment for the tourism sector. The objective of this TC aims to increase the institutional capacity of the Ministry of Tourism, Culture and Civil Aviation (MTCCA) in its ability to effectively coordinate the implementation of the NSTMP for Belize. The TC will pursue this objective through the following key interventions: (i) establishment of a Planning and Project Development Unit within the MTCCA that will provide the Ministry with improved institutional and technical capacity in planning, resource mobilization, project development, project management and stakeholder engagement; (ii) strategic re-alignment and enhancement of the institutional, legal and policy framework for the public administration of tourism in Belize; (iii) development of a strategic roadmap for the inclusion of Public Private Partnership model in the development of the tourism industry; (iv) building awareness and engagement of key local stakeholders, as it pertains to individual roles and responsibilities for the implementation of the NSTMP; (v) improved Destination Planning Process developed in collaboration with local stakeholders, and (vi) investment promotion and resource mobilization for funding of large-scale tourism projects as outlined in the NSTMP.

As part of the strengthening of local governance, Local Tourism Committees (LTCs) have already been established in the target areas of Corozal, Caye Caulker and Toledo. A Working Group has been established for the purpose of coordinating tourism development within protected areas of the Chiquibul National Park, Chiquibul Forest Reserve, Mountain Pine Ridge Forest Reserve and Caracol Archaeological Reserve.

Technical studies including a market study and value chain analysis have been conducted under a similar TC with the Inter-American Development Bank (IADB) to provide a tourism context to the development of Destination Plans in these areas. Following identification of priority projects within the plans, a supporting consultancy will further develop conceptual design plans for at least one priority project within the destinations.

This development of this tourism destination development plan (TDDP) for Corozal was commissioned by the MTCCA and financed by the IADB. The TDDP aims to identify priority needs and projects for Corozal aligned with the recommendations outlined in the National

Sustainable Tourism Master Plan for Belize (NSTMP). The plans will include but not be limited to the following components:

- A local vision, goals and objectives for tourism destination development;
- A tourism diagnosis of each destination that will be mainly based on available information from other consultancies currently underway or recently completed. Each of these destination diagnoses will compile and analyze, at least the following aspects: 1) tourism market in terms of: (a) demand, (b) supply (including tourism assets), and (c) competitors; 2) Institutional and regulatory framework; 3) Ecosystem service and climate change risk assessment; and 4) Tourism value chain and linkages to local economy and vulnerable people (in the case of Corozal);
- Strategies and action plans, including investment planning; and
- Implementation and monitoring plan and tools.

The information for the various components listed above will be gleaned from the results of working sessions with the Local Tourism Committees, which includes representation from the Corozal Town Council.

## ***1.2 The Local Tourism Committee***

The Ministry of Tourism, Culture and Civil Aviation (MTCCA), in conjunction with the Belize Tourism Board (BTB), and the Inter-American Development Bank (IDB), has established two Technical Cooperation Programs to provide capacity building support to implement the National Sustainable Tourism Master Plan (NSTMP). The NSTMP clearly states the roles and responsibilities of multiple stakeholders and the need for destination coordination for the plan's successful implementation. To this aim it highlights a strategy of encouraging and empowering local stakeholder leadership within all facets of tourism development including planning, product development, branding and quality management. Given the multifaceted nature of the tourism industry; tourism's importance to local economic and social development; and the unique attributes of Belize's individual tourism destinations, local level destination management and coordination will be instrumental. With this in mind, the MTCCA and the BTB, along with the Corozal Town Council, have facilitated the establishment of a voluntary Local Tourism Committee (LTC) for Corozal. The LTC is expected to provide a meaningful platform for local stakeholders to participate in the comprehensive planning, ongoing development and sustainable management of tourism in the Corozal District within the respective tourism planning region of Northern Belize (NSTMP).

The main role of the LTC is to support and facilitate the development of the Corozal Tourism Destination Plan. As such, the LTC has the following responsibilities:

1. Provide meaningful input and steward the Strategic Tourism Destination Planning process in Corozal;
2. Provide leadership for and champion the sustainable development and management of their respective destinations in accordance with the Destination Plans developed;

3. Increase and improve communication and coordination among Government entities, the private sector and civic society at the local levels and create and develop partnerships with local groups, businesses, and government;
4. Monitor the implementation of the Destination Plans and advise on local programs and policies to ensure the ongoing growth and vibrancy of the tourism sector in a sustainable manner;
5. Provide an advisory platform for local tourism related issues to be effectively communicated to the National Level for consideration;
6. Safeguard against negative social and environmental impacts.

Membership of the committee reflects the wide reach of the tourism industry and therefore reflects representation of interested individuals from the following sectors<sup>1</sup>:

1. Local Municipal Government
2. The tour guide community
3. The Accommodations Sector
4. The Restaurant Sector
5. The local tour operator sector
6. The transportation sector
7. Local conservation and protected areas management
8. Emergency Management: District Emergency Management Organization (DEMO)
9. Civic society and education
10. The cultural sector
11. Business sector/Belize Tourism Industry Association (BTIA) local chapter
12. The Belize Tourism Board (BTB) – *ex officio*
13. The Ministry of Tourism, Culture and Civil Aviation (MTCCA), NICH and Corozal House of Culture – *ex officio*
14. The Ministry of Fisheries, Forestry and Sustainable Development (MFFSD) – *ex officio*

Members are invited based on their ability to facilitate action and solicit input and information sharing for the mutual benefit of the tourism industry and the sector they represent. All members are expected to be familiar with the local tourism industry and the terms of reference herewith. A lead and alternate are selected to represent each sector.

The members of the LTCs for Corozal and other stakeholders involved in the development of this TDDP are listed in Annex 1.

### ***1.3 The TDDP Planning Process***

This TDDP is intended to lay out the medium-term strategic direction for the development of tourism in Corozal. The plan may also serve as a basis for fundraising efforts and preparation of work plans and grant proposals.

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<sup>1</sup> Where umbrella organizations exist, preference will be appointment of an individual through the respective organization.

The planning process was participatory, and involved the Local Tourism Committee throughout all stages. On 24 July 2015, members of the Corozal LTC participated in a planning session at Tony's Inn Resort that accomplished the following objectives: 1) conduct an external environment scan (PESTE Analysis); 2) define the vision and goals for the development of the tourism industry in Corozal; and 3) identify the major problems impacting the development of tourism in Corozal.

This session was followed up by another planning meeting on 14 August 2015, at Tony's Inn Resort. The purpose of this meeting was to define the strategic objectives and actions for the development of tourism in Corozal.

A considerable amount of information was collected as a result of these two planning sessions. The Consultant consolidated all the information gathered, along with the additional information obtained out of the research process and literature review (see Annex 6), and prepared this draft TDDP.

The following section provides background information on the Corozal tourism market.

## **2. The Corozal Tourism Market**

Most tourist visitation in Corozal District is credited to foreigners (primarily Americans and Canadians) looking to retire in Belize. Real estate companies have done fairly well raising the awareness of foreign investors, even utilizing international house hunting television programming for publicity. Land prices have increased as has construction, particularly along the waterfront. Several neighborhoods have been erected or are underway in Four Mile Lagoon, Consejo, and Progreso with Chunox hosting the latest and more grandiose of the complexes. Tax incentives exist to entice foreigners to retire there, and the quiet, simple, and relatively inexpensive life is appealing to those who do not mind trading some luxuries and amenities. Given the proximity to Chetumal and all its retail offerings, however, amenities are not far away.

A somewhat steady clientele is the Belizean traveler, particularly families on weekends and holidays who venture north often to visit friends and family and picnic along the Corozal Bay. Events like *Art in the Park*, hosted by a local community group attract Belizeans from throughout the District and neighboring District into Corozal Town once a month. Holidays, events, and festivals (such as the *Sarteneja Easter Regatta*) tend to bring in the greatest number of visitors at a time. Other Belizean travelers include government, businesses and NGO staff for meetings and events.

Missionary, educational, and other volunteer groups are a noteworthy market which supports tourism businesses in the District. Blue Ventures, an international non-governmental organization focused on marine conservation, leads eight volunteer groups a year to Sarteneja, each staying about two weeks. This fills several of the homestays during this time. Participants in these programs tend to have limited disposable income and time to indulge in tours, but typically visit an archeological site or two and buy a few novelties souvenirs. Shipstern Conservation and Management Areas hosts numerous Belizean student groups as well as

foreign university students and houses overnight guests onsite. The Manatee and Primate Rehabilitation Centers, managed by Wildtracks in Sarteneja, also has volunteers throughout the year, who are also housed onsite.

As Corozal borders Mexico, it gets traffic from people traveling to and from its northern neighbor. Among this group of travelers are foreigners/ expatriates living in Mexico who are required to leave Mexico for a minimum of three days before returning and receiving a new visa. Unfortunately numerous stories abound regarding Belizean immigration officials harassing these expatriates, insisting they show proof of pre-booked accommodations in Belize for the minimum time period required by Mexican authorities. It is unclear why the Belizean immigration is involved in monitoring this and why harassment persists despite rumored trainings provided to immigration staff.

Also venturing from Mexico are the Mexicans themselves. Many market actors in the District noted this market as having potential, given their interest in Belize, growing middle class with disposable income, and the fact that Spanish is widely spoken in Corozal District. As previously noted, many Corozal residents were displaced from Mexico during the Caste War of the 1840s and still retain tight connections with friends and family. Visiting one another is quite common. Much more remains to be understood about potential market segments in Mexico, including how to best reach these markets and how to promote greater visitation to Corozal District.

While a significant proportion of travelers to Belize are through pre-paid, full-package tours (25%), the only sign of this occurring in Corozal District is with the international volunteer programs. Some independent travelers book their accommodations via the internet prior to their arrival. Transportation, such as transfers and rentals, are also often pre-booked. The remaining tourists to the area are other free independent travelers (FITs). Included are backpackers, who are often traveling between Mexico and San Pedro in the Belizean Cayes or Belize City. Few stay more than one night if at all.

Until now, the market actors in the tourism sector of Corozal District have not been proactive in attracting tourists in existing or new markets. They have been fortunate due to location that they receive the minimal traffic they do. Much work lies ahead for identifying new markets and expanding existing markets in order to sustainably grow the tourism value chain in this area.

\* \* \* \* \*

According to the Statistical Institute of Belize September 2013 reports, 1,848 people are employed in Corozal District in tourism-related sectors. Table 1 shows the number of females (49.5%) and males (50.5 %) employed according to their work in excursions (attractions and tour operations), accommodations, restaurants (including food retail), souvenir/ crafts, and transportation (including water and land based travel). Data regarding employment through sales of art, handicrafts, etc., was not available and is not included in the table or calculations of total number of persons employed through tourism-related sectors.

**Table 1: Number of persons employed in tourism-related sectors for Corozal, 2013<sup>2</sup>**

<b>Sector</b>	<b>Government Category of Employment</b>	<b>TOTAL</b>	<b>Male</b>	<b>Female</b>
Excursions	Botanical and zoological gardens and nature reserves activities	20	10	10
	Tour Operator and Promotion Activities	30	30	-
Accommodations	Short term accommodation activities	258	151	108
Restaurants	Restaurants and mobile food service activities	800	194	607
Souvenirs/ Crafts	Retail Sale of food, beverages and tobacco	279	125	154
	Handicrafts/ arts	n/a		
Transportation	Land & Sea Transportation Activities	460	424	36
	<b>Total</b>	<b>1,848</b>	<b>933</b>	<b>915</b>

In 1994, the Corozal Free Zone Act established a duty-free shopping area on Belize soil, between the Belize and Mexican borders. There are more than 300 shops employing more than 1,000 Corozal District residents. Also included in this Free Zone area are three casinos, each with adjacent hotel.<sup>3</sup> These casino/hotels employ another 100-300 staff each. This area is thus the largest employment provider in the District. Tourists here are primarily Mexican and do not enter into Belize beyond the immigration checkpoint. While Belizean residents are not supposed to shop at the Free Zone it is known to happen.

For those entering into Belize from Mexico, Corozal is the main entry point. In the past, transportation routes required a stop in Corozal before transferring on to the next destination. Nowadays, however, it is easy for travelers to just keep going or bypass Corozal altogether. ADO (a Mexican transportation company) connects large cities (Merida and Cancun) in Mexico with Belize City, resulting in fewer guests stopping in Corozal. About five years ago, a direct boat transfer opened between Chetumal, in neighboring Mexico, to San Pedro, a hotspot for travelers on the Belizean Ambergris Caye. Prior to this, tourists in Mexico who were headed to San Pedro would need to cross into Belize at Corozal, where they would stay at least one night and then take a flight or water taxi to San Pedro. This direct boat service has detoured a significant amount of traffic away from Corozal.

In recent years, neighboring Chetumal has grown tremendously and is home to more than 500,000 Mexicans. Given the plethora of international retail and wholesale stores, restaurants, movie theaters and other entertainment options, Chetumal is a popular tourist destination for Belizeans. In fact, a significant number of Belizeans go to Chetumal on a regular basis for entertainment and supplies. Unfortunately, not many Belizeans stay in Corozal, making it more of a pass-through landscape.

Before all these external changes, Corozal District enterprises did not have to work very hard for their clientele because the market came to them. Now, proactive measures need to be taken. Additional expertise is needed to effectively, proactively expand existing and new markets. Even people who live in Corozal District claim there is little or nothing to do in Corozal, and Corozal Town residents dwell on the beautification of the waterfront as a key to unlocking the tourism potential. While the Bay and the Mayan temples are appealing, the town of Corozal is

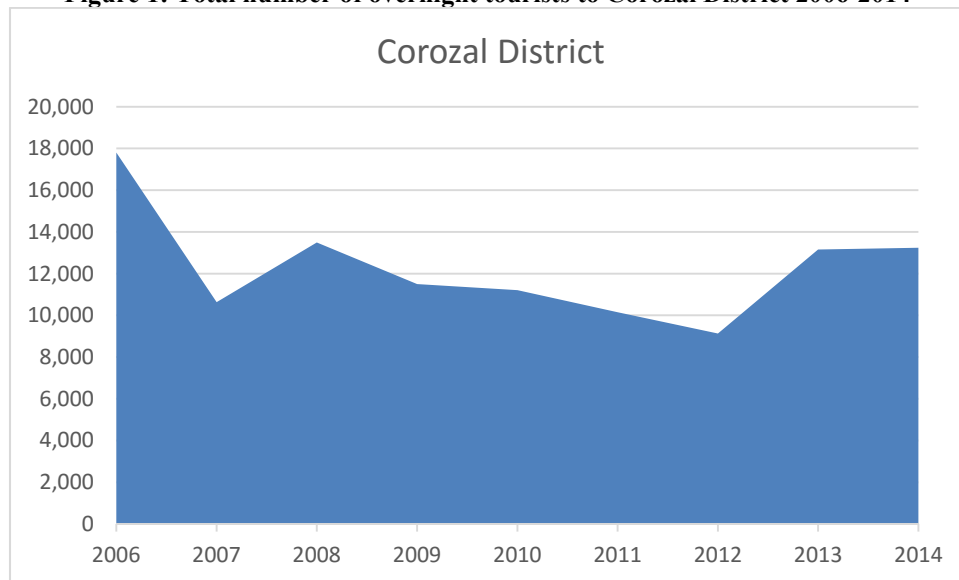
<sup>2</sup> Source: The Statistical Institute of Belize, Labor Force Survey, September 2013.

<sup>3</sup> One casino is currently under construction and is set to reopen in 2016.

not. Signage is practically non-existent, and there are few ways to learn about what tourism opportunities really do exist.

Perhaps because tourism has not developed so quickly, Corozal District remains a more economical and peaceful destination which appeals to both domestic and international travelers. While tourism to Corozal District was more significant in the past, it has begun to experience a slight upturn just recently. Figure 1 shows the total overnight tourist visitor numbers from 2006 through 2014.

**Figure 1: Total number of overnight tourists to Corozal District 2006-2014<sup>4</sup>**



Sarteneja is a small fishing village in the northeast part of the District. In 2009, the community developed a Sarteneja Tourism Development Plan and has made significant progress towards implementation. Previously the lack of accommodations and restaurants was a barrier to tourism development, but now a homestay collective and several guesthouses have been established. As tourism has increased to the area, restaurants and souvenir/art stores have opened in response. The positioning of Sarteneja, Cerros Archaeological Site, and several new real estate developments along the Bay are sparking more inter-Bay travel which is appealing to a growing number of tourists.

\* \* \* \* \*

The following analysis (Section 2.1) of the Corozal tourism market was sourced and adapted from Manuel L. Knight's July 2015 draft report entitled "Tourism Market Study and Identification of Investments for the Sustainable Tourism Program II in Belize".

<sup>4</sup> Source: Belize Tourism Board: *Visits To Destinations 2006 – 2014*



## **2.1 Volume, types, segments, management & marketing**

The overall dimensions of the tourism sector operating in Corozal as estimated for the baseline year 2014 are explained in this section. The key segments that make up the total demand are also explained. A final section treats management and marketing aspects.

### **2.1.1 Volume**

The estimate for tourism to Corozal in 2014 is as follows: The total count of overnight arrivals is 12,800, with an average LOS of 13.7 days and average daily spend of \$80. This profile has been formulated on the basis of BTB statistics and the findings of the Exit Survey and 2014 VEMS Survey.

Corozal attracted as many as 18,000 visitors at one time but its business declined severely for various reasons through the global economic recession reaching half that level at 9,000 in 2012. Orange Walk adjacent also exhibits a similar record of decline but one that is even more prolonged. Despite this erosion in market share, like many destinations in Belize, Corozal has of late achieved a partial rebound in arrivals which have been expanding at a rate of 4.3% since 2010, much below the 7.3% rate of growth in national arrivals but nevertheless a positive trend. With this decline in volume coinciding with the rise of a number of other destinations in Belize, Corozal saw a number of its operators and guides relocate to other locations to do business in the destinations on the rise and to handle the booming industry of shore excursions for cruise passengers.

Another factor cited for the decline is the start of formal water taxi services directly between Chetumal and San Pedro providing travelers between Mexico and Belize's top dive destination with a convenient direct link far simpler than the overland route that passed through Corozal.

### **2.1.2 Types and segments**

The leisure segments of tourist arrivals together make up 60% of total volume, and VFR, work and other small segments taken together as one segment make up 40% of it. The leisure segment can be subdivided. It includes cultural tourists to towns and villages at 30% plus three marine related segments namely visitors touring Corozal Bay by boat (20%), plus a small segment of sports fishermen active in the bay, and in nearby rivers and wetlands (8%) and a tiny segment of water sports enthusiasts (2%). Explanations of the types of visitors each segment includes are shown in the Table 2.

**Table 2: Types of visitors to Corozal**

<b>Segments defined for Corozal baseline</b>	
<b>SEGMENT NAME</b>	<b>COMMENT</b>
Cultural tourists	Visitors by auto to Corozal town and points of tourist interest around the bay to see, eat, learn and relax. Includes people attending festivities. Excludes visitors to the Free Zone. Includes limited FIT foreigners and Belizeans
Marine – tourists	Visitors cruising to points around the Bay and nearby protected areas like Shipstern (by boat; no sports activities); Birders included

Marine – sport fishing	Well-defined segment of fishermen using coastal areas, wetlands and rivers
Marine – sports activities	Somewhat young segment pursuing snorkeling, sailing, skiing, kayaking, paddle boarding and other sports activities in the bay, lagoons and rivers
Work, VFR & other	Any other non-leisure segments combined

The distinction between leisure visitors and educational, missionary or even health-related non-leisure visitors is not a clear one since some of these groups spend some of their time in Belize touring before or after their main activity is undertaken. Their motives for travel are multiple. They also arrange their travel with assistance from their local correspondents and therefore often do not use travel agents or tour operators to organize trips.

**Table 3: Top activities by visitors to Corozal<sup>5</sup>**

<b>Corozal top activities done by visitors</b>	
Swimming, Sunbath, beach activities	73%
Discover local history, culture etc.	60%
Water activities (sail, kayak, paddle board)	42%
Cerro Maya archeological site	40%
Diving, snorkeling	37%
Discover, participate in art & crafts	35%
Corozal Bay Wildlife Sanctuary	32%
Sports fishing	16%
Bird watching	13%
<b>Note: not mutually exclusive</b>	

As for the activities visitors pursue during their stays, respondents to the Exit Survey produced the following profile of participation rates in various activities during their trips: Water activities of various kinds drew high rates of participation. The diving/snorkeling rate of 37% is well below the rate for all tourists (67% for snorkeling) because Corozal Bay does not offer good diving/snorkeling sites and the reef is a long distance away. It is interesting that the Cerros Maya (Cerros) archeological site, reached by a 20 minute boat ride across the Bay from Corozal Town, got a higher response than did the Santa Rita site located in a residential section right in the town, which got only 32%.

Per the Exit Survey, 92% of visitors declared an inclination to return to Corozal on a next trip, and 89% an inclination to recommend it as a destination to other persons. Scores as to the quality of the activities and attractions visited were generally “good” or “acceptable”. Two areas signaled as needing improvement include “road and tourism signage” by 43% of respondents and “state of general maintenance and environmental quality of beaches, coast and sea for carrying out activities such as sunbathing, sailing, fishing, etc.” by 40%.

<sup>5</sup> Source: Exit survey of May 2015

### 2.1.3 Main competitors, needs of target markets

#### **Competition**

One tour operator identified both San Pedro and Orange Walk as competitors to Corozal, both being easily accessible from Corozal. Tourists staying at San Pedro can easily take day-long excursions to points around Corozal Bay (Sarteneja, Corozal Bay Wildlife Sanctuary, and Cerros Archeological Site) and cruise back to San Pedro late afternoon. There is no need to overnight along the way to cover this circuit. The Lamanai Archaeological Site with the New River nearby and a selection of lodges represents a strong attraction (292 reviews on TripAdvisor) that is internationally known. It is the limited appeal or interest level of Corozal's attractions that explains why travel planners and visitors allot travel time to these other destinations without any need to consider overnighing in Corozal.

#### **Needs of target markets**

The cultural market needs in Corozal Town include a more attractive and welcoming waterfront quarter establishing the area's link to the Bay and the town's function as its gateway. An attractive urban waterfront would draw more international tourists who are coming already to Belize, to feature a stop at the town they currently are bypassing. The quality standards of the lodging and restaurants also would need to improve to a level meeting their expectations. For the international tourist, since they largely research and plan their own trips themselves, they need extensive online information and explicit choices of easy-to-book packages well-designed and presented starting at Belize's international airport or at Chetumal, featuring stays in Corozal.

There is a second cultural market to target, that of residents of Orange Walk Town and of Chetumal across the border, who on weekends and holidays could choose Corozal Town for short break holidays enjoying the town and the various boat excursions on the Bay that it offers. They also need better quality food and some cultural and entertainment options. These can include meaningful experiences such as those evoking Mestizo heritage themes, or the varied wildlife of Corozal Bay and its role as a wildlife sanctuary, which all lend themselves to inspiring exhibitions, performances and commemorations of various kinds. A growing calendar of such events would introduce 'interactivity' to the Corozal experience and appeal not only to Belizeans and Mexicans but also to some international visitors as well. This requires an element of "edutainment" meaning education and entertainment combined.

The three marine markets of tourists by boat, sports fishermen and enthusiasts in other watersports would also in varying degrees be better served if Corozal Town were to serve as a better "platform" or gateway promoting the success of all such activities. Eventually regattas, competitions and ceremonies could be held on the Bay (a "blessing of the boats" each year) very much raising Corozal's visibility at the level of the nation and on the Internet as well. Bi-national Belize-Mexican competitions could be held. More sportsmen would opt for lodging in and around the Bay as a result. Distinctive events like these being somewhat unique in the region would raise interest in the Corozal "product" and raise international arrivals to Corozal. The effect might be largely "additive", that is, rather than shift demand already going to other Belize destinations, with these new experiences it would raise arrivals from other countries, Mexico being the first to target.

#### 2.1.4 Bottlenecks identified

Table 4 presents a number of bottlenecks or obstacles hindering the competitiveness of Corozal. They are divided into those affecting the business environment, those relating to infrastructure, and those that could relate to capacity building measures.

**Table 4: Bottlenecks hindering Corozal's competitiveness**

SEGMENTS AFFECTED	BOTTLENECK/OBSTACLE
	<i>Relating to the business environment</i>
Leisure segments	The foreign tour operators do not cover Corozal in their offerings and appear to lack any interest in it: none chose to complete the Tour Operator survey circulated for this project. This suggests a major lack of awareness problem in the travel marketplace. Separately a Belize tour operator has cited a lack of “market knowledge” as a top obstacle for Corozal as a destination.
Leisure segments	A parallel obstacle is the absence online of appealing packages featuring stops in Corozal that foreign visitors can research and purchase with ease. Since many tourists typically make their own flight arrangements these packages have no need to provide for international air options, simplifying the packages’ formulation. This is a major deterrent for the international markets.
Leisure segments	Corozal’s attractions by and large are not on the radar screens even of Belizean Tour operators who function more as <i>excursion operators</i> occupied elsewhere in the country and making little effort to develop inclusive tour products featuring places in Corozal District.
Leisure visitors from Chetumal	Departure fee of US\$18.75 is a deterrent for both leisure and business travel of Mexicans and is applied even to those coming from Chetumal. This tax is particularly burdensome for families to pay.
Leisure segments	BTIA Corozal Chapter has been dormant for some time while the industry was declining. A revival of this chapter started in late 2014 when a new leadership was put in place.
Cultural tourists	Owners of inns and guest houses especially in the villages are not familiar with pricing techniques, defining marketable packages or with choosing the optimal sales channels/booking sites to reach their target markets.
Marine touring	Tourists staying in San Pedro can use tour operators based there to visit points around Corozal Bay like Bacalar Chico, Shipstern Conservation and Management Area, Sarteneja and Corozal Bay Wildlife Sanctuary. They have no need to visit Corozal Town during such excursions.
	<i>Relating to infrastructure</i>
Cultural tourists	Corozal Town’s waterfront suffers in spots from erosion and deterioration marring the environment and reducing its appeal as a welcoming urban amenity with a strong sense of place.
All	Corozal town lacks a distinctive monument symbolizing its past that could be used in promotion and image-building. The Santa Rita Archeological Site has been mentioned (by business people) to serve this purpose.
Cultural tourists	Santa Rita Archeological Site has no interpretation to enrich visits. Nor has it any framework to host ceremonies or gatherings (such as weddings) efficiently and sustainably. It also lacks toilets. The Cerros Archaeological Site also lacks a dedicated space with a Bay view to hold gatherings.

Marine touring	Some areas around Corozal Bay especially Cerros Archeological Site are at times infested with insects causing a major nuisance for visitors and undermining the value of the visit experience.
Cultural tourists	The dirt road to the Cerros has a rudimentary hand ferry to cross the New River which at times is inoperable. In the rainy season certain parts of the road can become impassible. The same conditions apply for the drive to Progreso in which it is necessary to take a 2 <sup>nd</sup> hand ferry. Such conditions make scheduling trips to such areas precarious.
	<i>Relating to product development/other</i>
Cultural tourists	Business people in villages of cultural potential like Xaibe, Patchacan and Libertad do not know how to promote community types of tourism like homestay and agro-tourism (a tour operator).
All except VFR	The quality of the lodging offer and service quality in many establishments are inadequate for all segments.
All	The quality of restaurants is substandard for international visitors.
Marine touring, marine sports	Stops with proper toilets, appealing restaurants are needed at points around Corozal Bay such as Sarteneja and at Bacalar Chico to make all day excursions feasible.
Leisure segments	The growing foreign retirement population situated in settlements around Corozal Bay has not thus far created the stimulus to tourism that had been hoped for.

## **SECTION 2: THE TDDP**

### 3. The Planning Context

#### 3.1 *Key Elements of the External Environment Scan*

An external environment scan exercise was conducted using a standard PESTE (Political, Economic, Social, Technological, and Ecological) analysis which listed key external issues and trends that have impacted the development of the Corozal tourism industry and which also provided the context within which visioning and planning would take place.

The synthesis statement below (Box 1), broken down into its various components, is a synthesis of the brainstormed items from the PESTE analysis.

#### **Box 1 – The Wider Planning Context**

The tourism industry in the Corozal District faces serious challenges which constrain its ability to guarantee its long-term responsible development.

**Political** issues are characterized by the high degree of political partisanship which affects business development and the small entrepreneur. Government is not investing in preparing students for vocational experiences at a young age (e.g., from primary school). While just 5 years ago, there was a lack of understanding by national policy-makers and leaders of the tourism industry's contribution to the national and local economy, there have been some improvements recently. The NSTMP and STP II studies (such as the Value Chain Analysis and the Market Study) are providing a much better understanding of the Corozal tourism industry and its potential for growth. The views of local tourism stakeholders are now being considered through the Local Tourism Committee which provides a platform for tourism planning. However, there has to date been a limited national effort to broaden the scope of the tourism industry and the national tourism product by establishing northern Belize as a viable tourism destination. Even though Corozal is the gateway to northern Belize bordering the vast Mexican market, the District's tourism potential has largely been ignored by the decision-makers, exemplified by the age-old focus on San Pedro. Signs that this is may be changing include the renovation and modernization of the Santa Elena border crossing. However, the entry/exit of Mexican and other travelers is not facilitated, therefore deterring increased numbers of visitors to Belize. The entry/exit experience is aggravated by poor levels of customer service skills among staff of the immigration and customs department.

On the **economic** front, Corozal has the highest poverty rates in Belize, as pointed out by a recent Poverty Assessment Report. The economy of the northern districts has been negatively impacted as a result of underperforming papaya production, a lack of productive industry, the sugar industry crisis, the politicization of the import permitting system, and a sub-standard public transportation system. This has resulted in substandard and meager agricultural development, and under-employment, among other economic ailments. The slow down at the Corozal Commercial Free Zone as a result of negative publicity and expansion of shopping malls and casinos in Mexico has also affected the economy of northern Belize. The tourism industry standards in the district are sub-par due in large part to the limited or non-existent infrastructure at tourism sites. As a result, Belizeans tend to

prefer to visit destinations along the Mexican Riviera Maya rather than their own country. A district development plan is needed, similar to the municipal development plan that is in place for Corozal Town. The reduction in borrowing interest rates and Government's new focus on emerging tourism destinations has been spurring the private sector-driven development of Corozal's tourism product. Much of the newer tourism investments have been by foreigners and expatriates, which has contributed to driving up property values. There is a risk that, if development does not proceed equitably, the local population could be further economically marginalized.

**Social issues** are characterized by the high illiteracy rate in the region, the increased cost of health care and education, limited employment opportunities, and limited and under-developed human capital. There seems to be a lack of leadership and citizens' passion for Belize. Leaders lack development vision and sound business principles. The collaborative spirit among citizens and business owners leaves a lot to be desired; it is difficult for people to work together. This lack of community spirit and cohesion can to a great extent be attributed to highly divisive partisan politics. A pervasive lack of environmental awareness and civic pride, compounded by the inconsistent enforcement of laws and compliance with regulations, speak to a complacent and frustrated ("feeling helpless") society. However, there are still thriving businesses in Corozal; this means that the challenges are not so severe that people have to leave.

Positive **technological** advances have been characterized by major advances in information technology, including the availability and use of multiple social media platforms. However, there are capacity barriers among those who stand to benefit – the private sector, for example, is not taking full advantage of the technological resources that are available. The use of social media platforms, and its tremendous value in marketing initiatives, is consequently under-utilized. In terms of public infrastructure, while the major thoroughfare through Corozal Town (7th Avenue) is now paved, major sections of the district road network and other infrastructure need major improvement. For example, the Caledonia road (3 miles) and boat docking facility needs paving and upgrading. At the municipal level, the absence of proper lighting and signage is a good indicator of the poor implementation of municipal development plans. Similarly, lack of appropriately placed garbage bins contributes to the pervasive littering problem.

**Environmental** challenges are growing in number and severity. Low-lying coastal countries such as Belize will be the first to be affected by climate change and consequent sea level rise and increasingly catastrophic natural disasters, such as hurricanes, flooding and wildfires, which are bound to change the composition of natural ecosystems. Specifically, sewage and agricultural runoffs from southern Quintana Roo and the Corozal District along the Rio Hondo have been polluting the Corozal Bay. The extent of this pollution is not accurately known due to a lack of monitoring systems. The Corozal Bay nevertheless presents good opportunities for bi-national protection and management of the Bay's ecology and biological diversity. Large-scale development initiatives and associated plans for sea/bay dredging and mangrove clearing, are of great concern particularly because of



limited available information and insufficiently publicized consultations related to these proposed developments. There is limited environmental advocacy occurring in Corozal and there is a lack of knowledge about the environment within primary schools. However, SACD and Wildtracks have been engaging in bi-national environmental conservation initiatives, such as with ECOSUR. The large-scale use of agro-chemicals by Fruta Bomba Ltd has impacted human and wildlife health across the District. Fruta Bomba has practically moved all their plantations to other areas such as Progreso. However, apiculture has crashed – speculating that the bee population has plummeted because of agrochemical use. Beyond the agricultural issues like chemical pollution, the rapid deforestation rate due to the large-scale agricultural development (mostly by Mennonites) have affected flooding and drainage patterns. Within the urban and rural communities, health and safety standards and regulations (e.g., non-smoking regulations, building codes) are rarely enforced. There is also limited understanding of the effects of climate change and potential adaptation systems (e.g., deteriorating Corozal Town seawall). All in all, there is a limited understanding of environmental resources conservation and nature appreciation in District. This is well exemplified by the “Chorros”, a system of (man-made) canals that run through parts of Corozal. The flood control functions of the Chorros is being altered, because they are not being maintained.

Annex 2 provides the detailed results of the PESTE analysis.

### ***3.2 Vision for Corozal’s Tourism Industry***

After careful consideration of the external issues and trends that impact the development of Corozal’s tourism industry, the Vision Statement and Goal Statements shown in the boxes below were defined and agreed on at the strategic planning sessions. It was also agreed that the Tourism Destination Development Plan would have a five-year timeframe (2016-2020).

#### **3.2.1 Vision Statement**

- ***A vibrant, family-friendly, nature-based, cultural destination with diverse tourism experiences and attractions developed in an equitable and sustainable manner***

Corozal will position itself as a family-friendly, nature-based, cultural destination – namely, a gateway to Corozal Bay and to all the ecological, heritage and adventure opportunities that it offers.

Corozal Town, the urban hub of the District, will become popular for its welcoming waterfront district busy on weekends and holidays with Belizeans and Mexicans seeking leisure and recreational activities both in the town and via boat tours to points along the bay and up the New River. The key products it will offer will include cultural experiences reflecting themes such as the Mestizo heritage, events in Mayan history, other historical themes, the purpose of the Corozal Bay Wildlife Sanctuary and Shipstern Conservation and Management Area, as well as resorts and other points of interest around the Bay.

Located seven miles from Corozal Town is the Corozal Free Zone, a duty-free shopping area on Belize soil, between the Belize and Mexican borders. There are more than 300 shops in this Free Zone area, as well as three casinos, each with adjacent hotel. The Corozal Free Zone will be enhanced as an upscale shopping destination, offering major name-brand items and a classy leisure and entertainment experience to tourists, including Mexicans. While the TDDP will not focus on the Corozal Free Zone during the 2016-2020 period, it is important to recognize that this duty-free shopping area forms an important element of the Corozal tourism destination.

At the same time and as a counterpoint to Corozal Town, the village of Sarteneja will emerge from being just a quiet outpost to a mini-hub for eco-tourism excursions linking various points situated around the Bay. From its central location at the heart of the Bay, Sarteneja will draw tourists from both Corozal Town to the west, and from San Pedro Town to the southeast. It will offer different products, namely “Bay discovery” for cultural or general interest tourists, a variety of water sports for the sports-minded, and guided fly-fishing outings for fishermen. In its offer of ecotourism excursions, Sarteneja will also stage visits for birders and nature tourists to Shipstern Conservation and Management Area. Sarteneja’s vocation is a dual one, as hub at the heart of the Bay, serving tourists from Corozal Town, and also excursionists from San Pedro.

Other coastal communities (such as Consejo) as well as villages in the sugar belt will be integrated into the Corozal tourism product. Located just 6 miles north of Corozal Town on a point of land where the Bays of Chetumal and Corozal meet, Consejo will offer a peaceful and serene beach experience and a staging area for a quick boat ride to Chetumal. The villages in the sugar belt, such as Xaibe and Patchakan, will offer opportunities to experience the Mestizo Maya cultural experience, including food, handicrafts and agro-tourism experiences.

The segments to target include the cultural tourists both locally-based and international who would focus on the town, the marine-oriented tourists visiting various points around the Bay, as well as travelers visiting friends and relations (VFR). A preferred segment will be tourists who travel along with their families, including children.

From the standpoint of trip planning, Corozal in the short term will specialize in 1 and 2-day visits for Belizeans and Mexicans and perhaps 2-4 day visits by foreign cultural visitors and marine sports enthusiasts. For these tourists Corozal will serve as an interesting pause on a longer itinerary, but not as the main stop. Over the medium to long-term, Corozal will cultivate the vacation market, staying a week or two, such as those vacationers staying in the Northern Islands, Placencia Peninsula and Cayo.

### **3.2.2 Purpose Statements (Goals)**

By some measures the Corozal District is one of the weakest performing tourism destinations in Belize. Its volume of visitors since 2006 has declined and it has lost resources in terms of service providers catering to tourism, who work in other destinations.

Table 5 shows a set of various performance indicators for Corozal’s tourism.

**Table 5: Dashboard of indicators for Corozal<sup>6</sup>**

Dashboard of indicators for Corozal	
INDICATOR-ARRIVALS	TREND/COMMENT
Growth rate 2006-2014	Shrinking -3.6%; rebounding since 2010 at 4.3% pa.
Arrivals performance since 2006	Falling from 17,800 to 13,200 per pressures from recession, improved water taxi links from Chetumal to San Pedro bypassing Corozal, more express bus links from Chetumal to points in Belize.
Arrivals performance since 2010	Regaining share with partial recovery to 13,000 from low of 9,100 in 2012. 4.3% average yearly growth in arrivals since 2010.
Arrivals entering Belize via northern border Santa Elena station	Growing steadily from 22,000 in 2004 to over 32,000 in 2014 (preliminary data) as road traffic grows from Mexico. Average of 103 arrivals per day during 2014. The vast majority proceeds to inland points bypassing Corozal.
Average spend of \$80	This is a finding from the Exit Survey. Estimates for the work, VFR and other segment is \$72 and for the group of leisure visitors \$97. The national average spend is double this amount. Only 35% of visitors used hotel accommodation, a relatively low percentage.
Length of stay 14.7 days	Twice the national average stay of 7.1 per weighting of long stay VFR visitors and growing number of retirees taking homes in developments around the bay. The national average is half this amount.
RESOURCES	
Hotel capacity 2015 and performance	Has 368 rooms, 5% of national capacity. Average hotel size is 11 rooms. At \$52 average room rate, 32.5% room occupancy for 2014 it has the nation's lowest revenue per available room, \$19. This indicates that the bulk of the international visitors are not going to this destination.
Tour guides/tour operators	Corozal has 43 guides out of a total 1,481 in 2013. Many working in other districts where business is stronger. 5 tour operators are registered in Corozal.
Maya sites visitors 2014	Cerros 539 and Santa Rita 409 (BTB)
ACCESSIBILITY	
Road accessibility	Santa Elena border is a 10-15 minute drive from Corozal Town; Belize City 2 hours. International bus service is available to Chetumal and Cancun.
Air service	2 airlines offer 9 flights per day to San Pedro with onward service to other points
Water links	There is Corozal-San Pedro service. Some runs stop at Sarteneja. Water taxis also link both Corozal and Consejo to Chetumal.
TRAVEL TRADE	
TripAdvisor exposure	Extremely weak with single-digit reviews only for Santa Rita, Shipstern (versus 292 for Lamanai, higher for other attractions in Belize).
Role of tour operators	Minimal. On the Exit Survey no respondents visiting Corozal used tour operators. 95% booked their trips on their own.

<sup>6</sup> Source: "Tourism Market Study and Identification of Investments for the Sustainable Tourism Program II in Belize" Draft Report (Manuel L. Knight's, July 2015)

Competing destinations	Ambergris Caye, Orange Walk
EXIT SURVEY HIGHLIGHTS	
Reasons for not visiting	37% lack of information/unaware of what it is, what is offered; 27% not enough time to visit.
Reasons to visit on future trip	Its tourism services offering, value of its cultural/natural patrimony and 'it's a safe place'
Trip to protected areas as influence for future visit	"Would a trip to the following protected areas influence you to choose Corozal for a future visit?" yes percent per protected area: Shipstern 70%, Corozal Bay Wildlife Sanctuary 74%, Santa Rita 74%, Cerro Maya 80%
Willingness to spend, stay	Maximum amount willing to spend total \$300-400, per day \$240, for 3 days.
Inclination to visit again and recommend	Of respondents who visited Corozal 92% would visit again, 89% would recommend it to other persons.

Tourism stakeholders will need to create the enabling environment for the vision to position Corozal as a family-friendly, nature-based, cultural destination be realized. This will be done by focusing on achieving three inter-related goals, as follows:

- 1. Highly improved standards and quality of tourism products and services in Corozal;***
- 2. Increased opportunities for equitable tourism benefits;***
- 3. Increased and sustained tourist arrivals and overnight stays in Corozal.***

These goals are consistent with the NSTMP's "secondary" vision for Corozal, which state that the destination "will host cultural and nature tourism product offerings such as Shipstern Conservation and Management Area, Corozal Bay, Sarteneja and the manatees".

The NSTMP's "primary" vision for Corozal is that the area should be a "mid-to-high shopping and entertainment destination [with] fully developed and attractive open-air mid-high end shopping center hosting well-known brands, restaurants, cafes, bars and entertainment facilities such as casinos, theaters and bowling alleys, among others".

Participants of the TDDP planning sessions decided that they want to first and foremost position Corozal as a nature-based and cultural destination, rather than having "mid-to-high shopping and entertainment" focus taking precedence as indicated in the NSTMP.

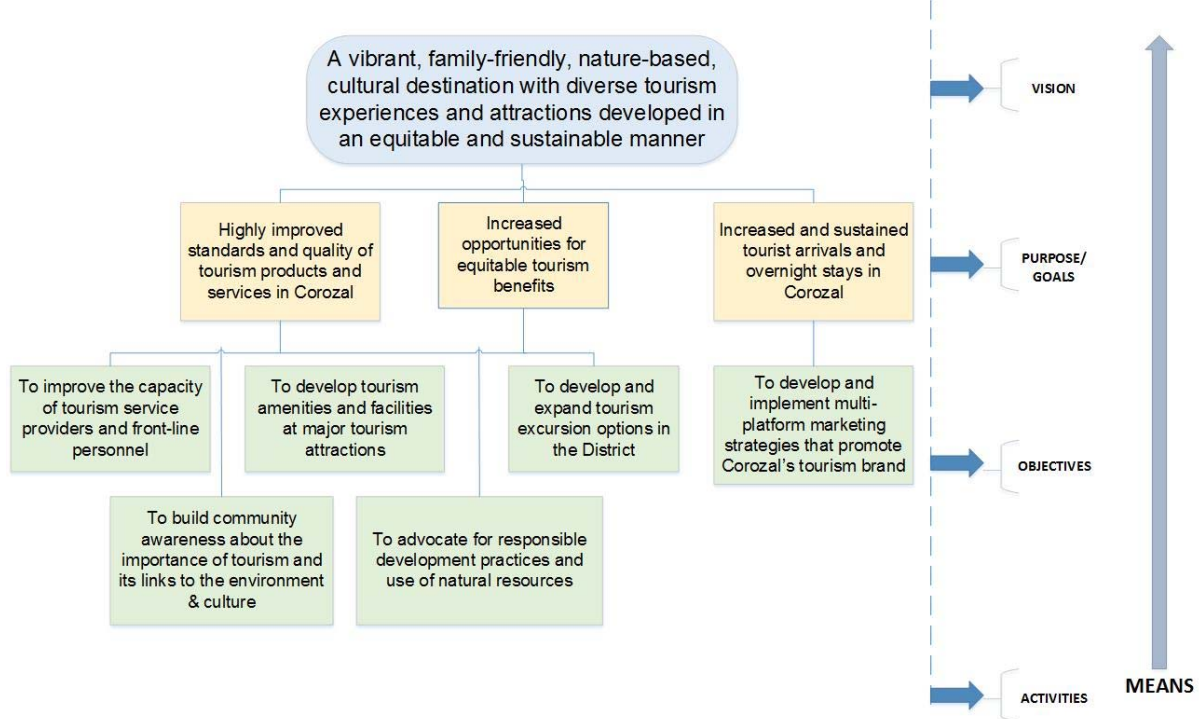
To achieve the TDDP goals, therefore, several core actions will be implemented under six strategic objectives as described in the following section.<sup>7</sup>

<sup>7</sup> While the TDDP will not focus on the Corozal Free Zone during the 2016-2020 period, it is important to recognize that this duty-free shopping area forms an important element of the Corozal tourism destination.

### 3.3 Objectives and Strategic Actions

The aforementioned Vision Statement and Purpose Statements provide the targets, which Corozal tourism stakeholders intends to work towards achieving via the implementation of the tourism destination development plan (TDDP). These targets inform and set the parameters for the strategic objectives that form the core of the TDDP (Figure 2).

**Figure 2: Vision, Goals and Key Objectives (Corozal TDDP)**



#### 3.3.1 Objective #1: Improve the Capacity of Tourism Service Providers and Front-Line Personnel

The Corozal Tourism Value Chain Analysis (Action for Enterprise, August 2015) determined that the lack of skills (particularly hospitality skills) among excursion product/ service providers limits provision of quality experiences.

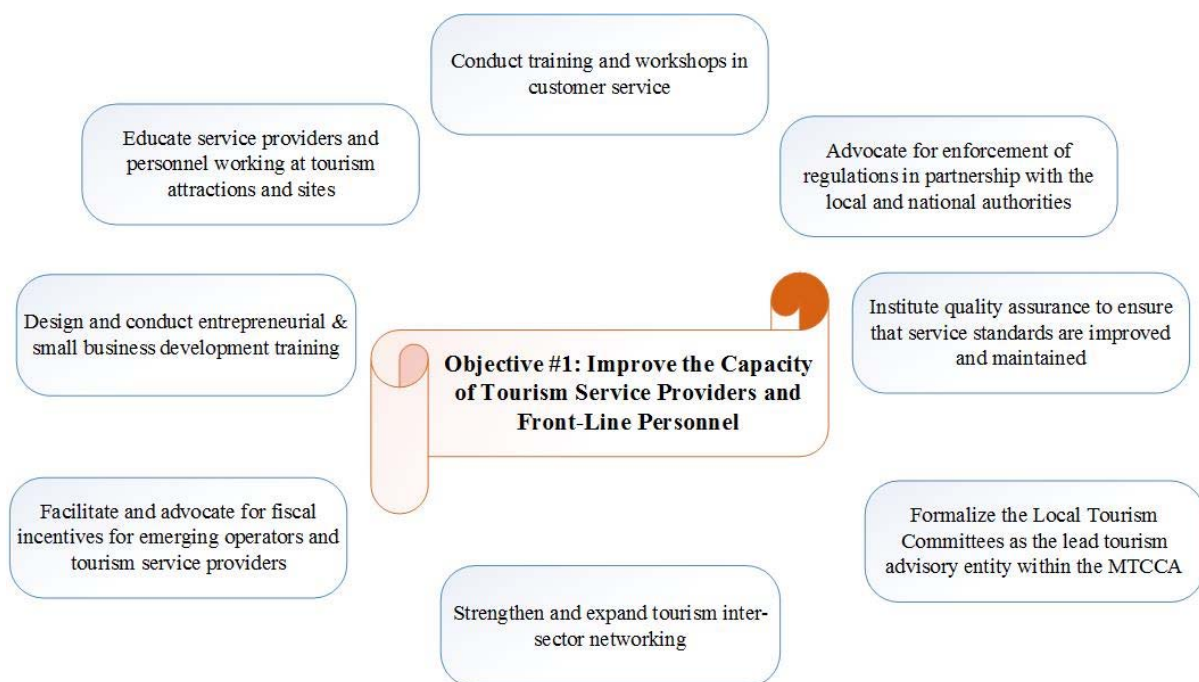
The services of service providers as well as guides, taxis, and accommodation and restaurant staff is often referred to as friendly but lacking. This is throughout Belize, including the Corozal Districts. Most tourism market actors are pleased with their staff and have had several employees with them for many years. At the same time, however, the same enterprises expressed their concerns for the quality of available employees, lack of experience, need for in-house training, and need for staff to be trained to the next level of service quality. Resoundingly, employers found staff members to be hard working and friendly, yet lacking in understanding of proper hospitality services. Guides, while required to have training and certification from the Belize Tourism Board, could benefit from more specialized trainings in particular areas of expertise such as birding, archaeology, fishing, etc. The same holds true for

service providers who have less experience and training in working with and serving tourists. The standard of service could be improved to enhance the total tourism package of Corozal.

Of additional concern is the poor customer service at border entry points by immigration officers. Mexican and other foreign visitors coming from Mexico have many times been reported to having extremely negative interactions with Belizean immigration officers at the border crossing followed by declarations of “never wanting to visit Belize again.” Border entrance stations are the first and last impressions of the country, and locally are making winning over the tourists’ hearts an uphill battle. It is rumored that trainings were held for immigration officers in the past, but were ineffective. Additional education perhaps as well as incentives are needed to motivate immigration officers to improve their customer service. In some countries an electronic system allows the visitor to rate the experience with the immigration officer with a smiley face, neutral face, or frowning face as the visitor completes the border crossing process. Perhaps first needed is a better understanding of the challenges and priorities of the local immigration office.

To improve the capacity of tourism service providers and front-line personnel, the following strategic actions are recommended (Figure 3). These are described below.

**Figure 3: Strategic Objective 1 and Actions**



### **1. *Conduct training and workshops in customer service.***

Customer service training will be geared at tourism service providers, such as tour guides, taxi drivers, archaeological site wardens, and hotel and restaurant staff. Training will also be offered to Police, Immigration and Customs Officers, as well as employees of the Border Management Agency and BAHA. Customer service training will, among others areas, focus

on improving hospitality habits such as: 1) making a good first impression, 2) communicating clearly, 3) being respectful, 4) knowing your community, 5) knowing your job, 6) handling problems effectively, and 7) making a good last impression.

***2. Educate service providers and personnel working at tourism attractions and sites.***

Besides being trained in customer service skills, service providers and administrative personnel will be trained in basic business management skills, such as supervisory skills and advanced management skills, time management skills, finance and accounting for non-financial managers, inter-personal skills, managing and resolving conflict, public relations, office and records management, effective telephone skills, working in teams and developing high performance teams, and so on. These training courses could be carried out in partnership with the Corozal Junior College and/or other reputable training institutions (such as the Belize Training and Employment Center and the Belize Institute of Management). Training will also be offered to Police, Immigration and Customs Officers, as well as employees of the Border Management Agency and BAHA.

***3. Design and conduct entrepreneurial and small business development training.***

The Small Business Development Centre Belize (SBDC Belize), a unit of the Belize Trade and Investment Development Service, will be engaged to provide customized needs-based services to MSMEs with the aim of facilitating their competitiveness and improve their standards and service delivery. Training in entrepreneurship will be delivered as a way to promoting new tourism businesses in Corozal by encouraging creativity, fostering strategic risk-taking and enhancing ability to succeed. SBDC Belize provides one-on-one, needs-based services. All advisory services are free of cost and may include but are not limited to: 1) business plan development, 2) financial advice, 3) financing options, 4) marketing and sales, 5) loan application assistance, and 6) feasibility studies.

***4. Facilitate and advocate for fiscal incentives for emerging operators and tourism service providers.***

This includes, with the assistance of BELTRAIDE, securing import duty exemptions and GST waivers for the importation and purchase of equipment such as boats, outboard motors, and life jackets. Lending institutions such as the Development Finance Corporation, which offers low interest loans for the tourism sector, as well as micro loans for grassroots tourism entrepreneurs – will be approached with a request to offer low-interest commercial loans or venture capital to aspiring operators. The Ministry of Tourism will support the requests, while BELTRAIDE will provide technical guidance for business plan development.

***5. Strengthen and expand tourism inter-sector networking.***

Networking among the various sectors of the tourism industry in the Corozal District will be strengthened and expanded in order to facilitate the marketing of excursion options. Networking will be primarily carried out via familiarization tours to experience first-hand the various excursion options within the District (e.g., Corozal Bay sailing tours, Shipstern Conservation and Management Area, Bacalar Chico, Sarteneja Village and Wildtracks, Cerros



Archaeological Site and tourism resorts, etc.). Besides observing the natural attractions being offered, the familiarization tours will include networking meetings with tour operators, tour guide associations, handicraft makers, restaurant operators, and other tourism sector market actors. The Local Tourism Committee will expand its reach by strengthening the representation within the various sectors that comprise the committee.

**6. *Formalize the Local Tourism Committees as the lead tourism advisory entity within the MTCA.***

The Corozal LTC will be formalized as part of the legislative reform process that is currently underway. This will ensure that the interests and aspirations of local tourism stakeholders are taken into consideration in the development of the tourism industry.

**7. *Institute quality assurance to ensure that service standards are improved and maintained.***

As a way to provide incentives for the improvement and maintenance of service delivery standards, the Belize Tourism Board will be engaged to provide support and guidance through its Quality Assurance Department. This department focuses on the enhancement of industry-specific quality standards through legislation and licensing; it also integrates the strategic priorities and programs outlined under the National Sustainable Tourism Master Plan (NSTMP). Support and guidance will also be provided to improve and maintain standards for accommodations, tour operators and tour guides based on existing regulations. Attention will also be placed on improving the service standards for the food service sector and implementing a comprehensive management system for Corozal.

**8. *Advocate for enforcement of regulations in partnership with the local and national authorities.***

The Local Tourism Committee will liaise closely with local and national authorities (such as the municipal governments, the Health Department, and the Belize Tourism Board) to ensure that relevant regulations are enforced fairly and consistently. The LTC will therefore serve as a type of “standards watchdog” that will monitor compliance of quality assurance protocols and requirements in order to improve and maintain service standards. Examples include food-handler training and permits for the food service sector, boat handling training and licenses, first aid certification for tour guides, and so on.

**3.3.2 Objective #2: Develop tourism amenities and facilities at major tourism attractions**

The quality of tourism products and services is often limited by the quality of the facilities. This makes it more challenging to sell the excursion attractions to tourists and increase word-of-mouth marketing. There is a dire need to improve the physical facilities in addition to the skills of the service providers in order to enhance the tourist experience. This would be in line with the NSTMP’s objectives to develop standards for attraction facilities.

**Tourism potential of key products**



One key product is the “urban” product focused on the town of Corozal and the Bay to which it opens. Its potential will grow as the town improves its waterfront, adds a promenade, and builds up its cultural calendar to host a number of leisure activities and support leisure oriented businesses to be created in the zone fronting the bay. Visitor volume could grow far higher than the 6,000 annual visitor estimate for marine and cultural tourists and do so relatively quickly drawing Mexicans and international segments as well as Belizeans. Similarly, as operators of excursions learn to better package and price different activities, they can expand the offer of water-themed activities from their bases at the heart of the bay. These same products are of proven popularity elsewhere in Belize and the operators can apply what they have learned to base some operations at Corozal and Sarteneja, linking other waterfront communities such as Consejo and Copper Bank.

### **Needs for enhancement of attractions**

The primary need is that of adapting the waterfront and adjacent urban areas in Corozal town to provide a welcoming ambience that will exhibit the Bay in a memorable way. Once a promenade or boardwalk is installed the House of Culture can be upgraded as a full-fledged visitors’ center providing information about the Bay’s natural attractions, as well as cultural and historic features of interest (such as the Catholic Church, Fort Barlee, Santa Rita Archaeological Site, etc.).

The House of Culture/visitors’ center could perhaps also serve as a staging area for excursion boats and water taxis, providing water linkage and connectivity to San Pedro, Chetumal, Copper Bank, Consejo, Sarteneja, Cerros, and Bacalar Chico.

An encompassing master plan for the waterfront part of the town is needed. The visitors’ center could present the story of the Bay and the meaning behind its role as wildlife sanctuary.

The archeological sites of Santa Rita and Cerros also are in need of enhancements because as they stand today they are not compelling but are rather “mute”. The Santa Rita site is in a quiet residential area of Corozal town, and is bypassed by most tourists to the town. Having no interpretive information of any kind, it is a silent structure of limited visual interest. What is needed is a major upgrading program for public use on a sustainable basis providing a framework for uses like events and commemorations and even festive weddings. The small town of Sarteneja is already attractive and will undergo small improvements (such as renovation and extension of the Sarteneja wharf, and improvement of sea-front tourism infrastructure – picnic benches, toilets, and changing rooms) as the number of operators using the Bay expands.

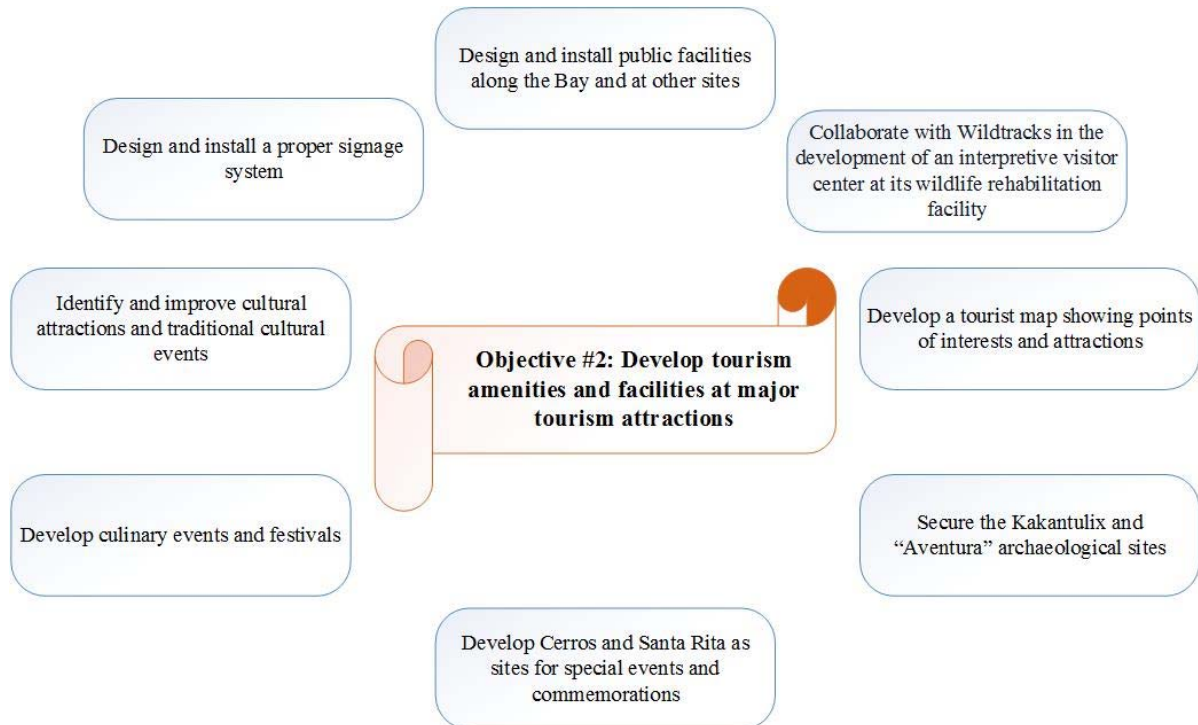
Besides the main tourism hubs of Corozal Town and Sarteneja, communities in the District’s sugar belt can form a part of the Corozal tourism product by offering cultural and agro-tourism attractions and services, such as handicrafts produced by master artisans, culinary experiences, and sugar cane products (such as rums and confectioneries). In San Antonio, for example, a community of male artisans are known for their wood working.

Villages such as Chunox and Copper Bank, which are predominantly fishing communities, could offer seafood gastronomic services. Progreso is located next to a picturesque lagoon

that drains into the Corozal Bay and hence could potentially offer excursions featuring Mestizo cultural experiences as well as boat tours.

Considering the above needs, the Corozal LTC identified the following strategic actions for implementation in the short and medium-term (Figure 4). These are described below.

**Figure 4: Strategic Objective 2 and Actions**



### 1. *Design and install public facilities along the Bay and at other sites.*

These public facilities should include bathroom facilities, picnic benches and rest areas, garbage bins, interpretive cultural/nature centers, shaded areas, and so on. A pedestrian pier plus boardwalk with visitors’ center ensemble near the Corozal Town Old Market would symbolize the emerging destination status of Corozal Town and its role as gateway to the Bay. Food and beverage concessions should also be established at Cerros whenever visitor numbers increase and stabilize.

Table 7 (Section 3.4.1) contains investment project ideas for improving the product that Corozal will provide. These include: 1) Bayside boardwalk and waterfront neighborhood, 2) Promenade, 3) South end park project, 4) Santa Rita site improvements, 5) Cerros site improvements, 6) public docking facilities, and 7) a signage system.

### 2. *Design and install a proper signage system.*

Belize road system including roads to and inside the tourist sites and protected areas is in dire need of a proper signage system. Well-designed directional and location signs will be installed

within Corozal Town and major villages, and on the way to visitor sites and attractions in the towns and villages. To this end, Belize has already adopted international signage protocols in place for roads and highways. Transportation and tourism authorities will be asked to conduct a location study and needs assessment for a proper signage system for the Corozal District. Consideration will be given to a comprehensive signage program including the following: gateway and welcome signage at key entrance/exit points; directional signage for main tourism services (such as transportation hubs and visitor information centers); directional and information signage for attractions (cultural, natural, historic, etc.); and policy and safety signage (in particular for ecologically sensitive areas).

**3. *Identify and improve cultural attractions and traditional cultural events in Corozal Town and villages.***

These attractions and events could include medicinal trails, culinary demonstrations, village festivals, and so on.

Culinary events and festivals featuring the traditional food, spices and herbal medicines that are unique to the Mestizo culture will also be promoted. These will be organized by local cultural groups with the support of NICH, the Corozal House of Culture, and other relevant organizations.

**4. *Develop Cerros and Santa Rita as sites for special events and commemorations.***

This should be led by the Institute of Archaeology partnering with the BTIA-Corozal Chapter. An MOU already exists between these organizations in this regard. See Table 7 (Section 3.4.1) for more details.

**5. *Secure the Kakantulix and “Aventura” archaeological sites.***

Kakantulix is located south of Shipstern. Several years ago, the Institute of Archaeology and Wildtracks partnered to create the Statutory Instrument to create the Kakantulix Archaeological Site. The process to establish the site has not been completed. Kakantulix is located in an area that may be vulnerable to agricultural development. Similarly, Aventura is not secured as an archaeological site at this time. It is located within the outskirts of San Joaquin Village and has the potential to become a major tourist attraction.

**6. *Develop a tourist map showing points of interests and attractions.***

The tourist map will show points of interest and attractions in Corozal Town and the rest of the district. This map could be used in brochures, websites, social media platforms, bulletin boards at community parks, and so on. GIS mapping of attractions will need to be done to ensure that the location of the attractions are accurately indicated on the map.

**7. *Develop improved interpretation and experiential tourism opportunities.***

Corozal District offers various opportunities for the development of interpretation and experiential tourism activities. For example, Wildtracks operates a wildlife rehabilitation facility near Sarteneja Village and to date has preferred to discourage visitation to its facility other than school groups with prior appointments. Recently, however, there are signs that Wildtracks may consider developing an educational center enabling visitors to see some of the animals in rehabilitation, learn about the rehabilitation process and how they are returned to the wild. Another example is the Ranger-for-a-Day activity offered by SADC, the co-managers of the Corozal Bay Wildlife Sanctuary. For a fee, tourists can serve as an SADC Ranger and accompany the SADC field staff on a day of monitoring activities within the protected area. Thirdly, the Corozal House of Culture could serve as a staging area agro-tourism tours to villages in the sugar belt. Tours could include visits to farmers' markets culinary events, and tours of integrated farms.

### **3.3.3 Objective #3: Develop and expand tourism excursion options in the District<sup>8</sup>**

Corozal can position itself as a refreshing destination, namely as gateway to Corozal Bay and to all the heritage and adventure opportunities that it offers. It will become popular for its welcoming waterfront district busy on weekends and holidays with Belizeans and Mexicans seeking leisure and recreational activities both in the town and via boat tours to points along the bay and up the New River. The key products it will offer will include cultural experiences reflecting themes such as the Mestizo heritage, events in Maya history, other historical themes, the purpose of the Corozal Bay Wildlife Sanctuary, and resorts and other points of interest around the bay. Corozal's tourism offerings could also capitalize on the rich agricultural tradition and industry of the District through agro-tourism linkages to create new and exciting tourism products and services, which add value to agricultural production. Excursion options could include visits to farmers markets (featuring fresh fruits and vegetables, specialty foods, home-made natural preserves, and healthy food options), culinary events (e.g., tacos festivals, corn-fests, and culinary competitions linked to BTB's Taste of Belize), and tours of integrated farms. The segments to target include the cultural tourists both locally based and international who would focus on the town, the marine tourists visiting various points around the Bay, as well as VFR.

At the same time and as a counterpoint to Corozal town, the village of Sarteneja can emerge from being just a quiet outpost to mini-hub for eco-tourism excursions linking various points situated around the bay. From its central location at the heart of the Bay, it can draw tourists from both Corozal town to the west, and from San Pedro to the southeast. It can offer different products, namely "bay discovery" for cultural or general interest tourists, a variety of water sports for the sports-minded, and guided fly fishing outings for fishermen. In its offer of ecotourism excursions it can also stage visits for birders and animal lovers to Shipstern Conservation and Management Area, and Wildtracks center for primates and manatees. Sarteneja's can potentially develop to serve tourists from Corozal town, and excursionists from San Pedro.

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<sup>8</sup> The discussion in this Section is partly based on the reports entitled "**Tourism Market Study and Identification of Investments for the Sustainable Tourism Program II in Belize**" (Manuel L. Knight, July 2015) and "**Pro-poor (inclusive) value chain analysis and recommendations for the Belize Sustainable Tourism Program II, specific to Corozal & Toledo Districts**" (Action for Enterprise, August 2015).

The Corozal District excursions sector, however, is in a fledgling state. Table 6 shows the number of registered tour operators (and guides) from 2004 through 2013. While there was a recent increase in number of tour operators, there are more looking to develop tour operator businesses in the future. Potential excursion operators include a handful of tour guides who work the cruise ship circuit yet would prefer to operate full time in their home district. They have begun outlining tour packages (bundles of attractions/ information offered to a tourist typically in a one-day or half-day tour). Some have distributed a few fliers to accommodations, started a Facebook page, and printed business cards; yet, they have only attracted a small number of tourists through these avenues if at all. Still, they see the potential of business growth in the future.

**Table 6: Number of registered tour operators & guides 2004-2013, Corozal District**

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
<b>Tour Operators</b>	2	0	2	1	1	1	2	2	3	5
<b>Tour Guides</b>	29	35	31	30	20	24	27	35	44	43

*Source: Belize Travel and Tourism Statistics Digest, 2013*

Among those tour operators in operation are the water-based excursion operators. They offer chartered boat trips for fishing, fly-fishing, sightseeing (e.g., to Cerros Archaeological Reserve and Bay tours), snorkeling, and even a trip to Bacalar Chico Marine Reserve with overnight option. These trips are available from Corozal Town, Consejo, and Sarteneja.

Existing excursion products and services in Corozal District relate to cultural or nature-based travel. Most of these excursion attractions are managed by government entities and/or non-governmental organizations. Few private individuals working in excursions have developed functional businesses, but these are emerging. Providers of excursion attractions/ products/ services are referred to as Excursion Product Providers (EPP).

#### **Cultural Tourism Excursion Product Providers**

For cultural experiences, EPPs include, but are not limited to:

- **Corozal House of Culture**
- **Window Into the Past East Indian Museum**
- **Festivals and fairs, such as *Art in the Park*, *Full Moon Concert*, and *Sarteneja Easter Regatta*.** Many other festivals and fairs of various themes and sizes exist as well.
- **Town Hall Mural**
- **Dance Performances**

Of particular importance for cultural tourism are the archaeological sites. In Corozal, there are two sites of significance – Cerros Archaeological Site and Santa Rita Archaeological Site. Another site, Kakantulix, has been recognized for its significant archaeological significance but has not been secured as an archaeological reserve.

### **Nature Tourism Excursion Product Providers**

The highlight attraction to Corozal District is Corozal Bay. The Bay was designated a Wildlife Sanctuary as part of an international effort by Mexico and Belize to protect the marine environment of the Chetumal/Corozal Bay. The Corozal Bay Wildlife Sanctuary extends around the eastern edge of Corozal District, adjacent to Ambergris Caye among other smaller islands.

Along the northwest side of Ambergris Caye is the Bacalar Chico Marine Reserve, a haven for nature-based adventure tourists. Just recently, the Marine Reserve opened basic accommodations for overnight visitors. Corozal District tour operators are at an advantage over San Pedro in accessing and marketing this area. The Corozal Bay Wildlife Sanctuary, paired with Bacalar Chico Marine Reserve and several river tributaries provides for many water-based excursion opportunities which include but are not limited to: fishing, fly fishing, snorkeling, diving, reef visits, manatee viewing, kayaking, canoeing, standup paddle-boarding, and swimming. There are a few beach areas but not many, which may make it even more enticing for visitors to get out on a boat to explore.

Additionally, there are five land-based protected areas in Corozal District – Honey Camp National Park, Freshwater Creek Forest Reserve, Shipstern Conservation and Management Area, Fireburn Reserve (proposed private reserve), and Balam Na Reserve (proposed private reserve). Shipstern has a visitor's center and welcomes Belizean student groups, international university student groups, researchers, and tourists to visit the site.

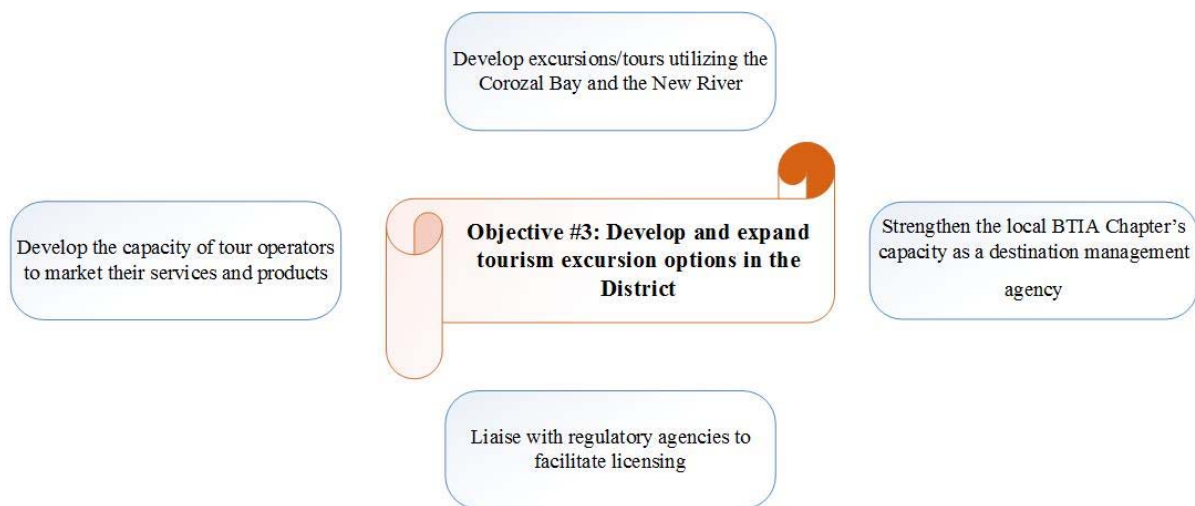
In addition to these adventurous protected areas, there are caves and cenotes<sup>9</sup> worthy of exploring. Tour operators can take people to these places, but they are not cleaned up and ready for tourists. So visiting these spots is an adventure. Several tour operators/tour guides in Sarteneja expressed an interest in cleaning up these sites and setting up a shaded area with picnic tables.

The following strategic actions will be implemented as necessary precursors to developing and expanding tourism excursion options in the District (Figure 5). These are described below.

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<sup>9</sup> “Cenotes” are natural sinkholes resulting from the collapse of limestone bedrock that exposes groundwater underneath. Especially associated with the Yucatán Peninsula of Mexico, cenotes were sometimes used by the ancient Maya for sacrificial offerings.

**Figure 5: Strategic Objective 3 and Actions**



**1. *Develop excursions/tours utilizing the Corozal Bay and the New River.***

The excursions sector is seeing significant growth throughout Belize. In Corozal, several tour guides are on the verge of launching their tour operator businesses and have planned potential tour options. For the most part, there are some excursion product/services in the District, i.e., places to take tourists – but little packaging, advertisement, and implementation of tours has occurred. For water-based excursions, a few tour options have been introduced and are growing annually.

From the standpoint of trip planning, Corozal in the short term can specialize in one and two day visits for Belizeans and Mexicans and perhaps 2-4 day visits by foreign cultural visitors and marine sports enthusiasts. For these tourists, Corozal serves as an interesting pause on a longer itinerary, but not as the main stop. A concerted effort will be undertaken over the period of the TDDP develop and expand excursion option in order to cultivate the vacation market, staying a week or two, such as those vacationers staying in the Northern Islands and Cayo. European and other traditional markets would likely be keen to stay for longer periods (a week or two) in Corozal.

Excursion options may include chartered boat trips for water-based excursion opportunities which include but are not limited to: fishing, fly fishing, snorkeling, diving, reef visits, manatee viewing, kayaking, canoeing, standup paddle-boarding, and swimming; visits to Bacalar Chico Marine Reserve and Shipstern Conservation and Management Area with overnight option, and cultural tourism experiences (living and heritage culture), among others.

Presently, the New River is only being used by the sugar barges to transport sugar. Tours may include chartered boat trips for water-based excursion opportunities which include but are not limited to: fishing, fly fishing, manatee viewing, kayaking, canoeing, standup paddle-boarding, and swimming; as well as sightseeing (e.g., to Cerros Archaeological Site, Lamanai Archaeological Site, and Bay tours).

## ***2. Develop the capacity of tour operators to market their services and products.***

Corozal does not necessarily fit the tourist market segment for which Belize is typically marketed (mid-to-high end, mostly American, all-inclusive/prepaid markets). Given this market is the BTB's focus, it will be critical for tour operators and other market actors to be proactive in marketing for themselves (as individual businesses or collectively). This is challenging given little is known about alternative markets. Paired with this is the challenge of limited knowledge of current visitation and satisfaction at the local destination level.

Mexico has been noted as one of several potential markets, but little is known about the travel capabilities and preferences of this market. For instance, it is unclear to many market actors whether Mexican residents must have a passport, car insurance, and/or proof of accommodation bookings before crossing into the District. This lack of understanding makes several enterprises unsure of the barriers to attracting the Mexican market in the first place.

Capacity building initiatives will be undertaken to increase the tour operators' knowledge about current visitation and satisfaction at the local destination level, as well as the travel capabilities and preferences of the Mexican market and traditional markets.

Several emerging tour operators lack the know-how to package, price and market the tours to even get them started. Tour operators will be trained in packaging and marketing tours utilizing websites, social media platforms, and others means. With improved promotion of packaged tours, tour operators outside of the District may start advertising local tours.

## ***3. Liaise with regulatory agencies to facilitate licensing of tour operators and their services.***

The Ministry of Tourism, with the guidance of the Corozal Local Tourism Committee, will promote awareness, support and guide tour operators in the application process to acquire the necessary permits, licenses and tour operator registration from the relevant authorities (such as the Belize Tourism Board, Port Authority, Tax Department, Town Council, etc.).

## ***4. Strengthen the local BTIA Chapter's capacity as a destination management agency.***

As the umbrella private sector organization for tourism, the BTIA can provide leadership via its chapter in Corozal by cultivating a unity of vision and by helping the various trades secure some needed types of training to operate better and to get access to financial sources that will underpin capital investments. The BTIA could partner with the BTB to strengthen the businesses running excursions by providing training in latest techniques and strategies in formulation of tour packages, pricing and marketing channels as practiced in the Caribbean and North American marketplace. The few current operators in Corozal are micro businesses that need training to produce better excursions and to negotiate better prices for them. They also need training to negotiate from a stronger position with tour operators insisting on cut rate fees. BTIA could also advise the excursion operators on the techniques of formulating inclusive tours and on the pricing and marketing of tours to target markets.<sup>10</sup> For the BTIA

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<sup>10</sup> Source: "Tourism Market Study and Identification of Investments for the Sustainable Tourism Program II in Belize" Draft Report (Manuel L. Knight's, July 2015)



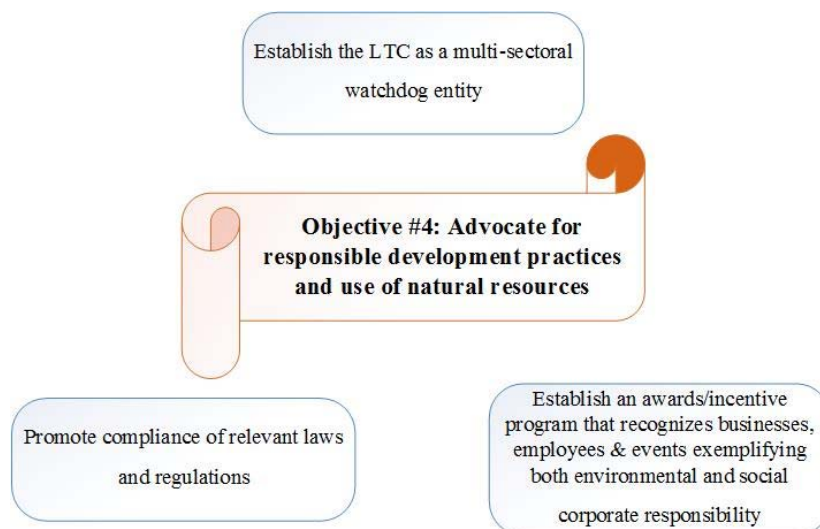
Corozal Chapter to perform such functions effectively, it would need to build its capacity as a destination management agency. Support in the form of financial and technical resources will be secured for this to occur.

### 3.3.4 Objective #4: Advocate for responsible development practices and use of natural resources

The external environment scan (see Section 2.1) listed key external environmental issues and trends that have impacted the development of the Corozal tourism industry. Even though environmental challenges are growing in number and severity, there is limited environmental advocacy occurring in Corozal and there is a lack of knowledge about the environment within primary and secondary schools. Within the urban and rural communities, health and safety standards and regulations (e.g., non-smoking regulations, building codes, and anti-littering laws) are rarely enforced. There is also limited understanding of the effects of climate change and potential adaptation systems (e.g., the deteriorating Corozal Town seawall). All in all, there is a limited understanding of environmental resources conservation and nature appreciation in the District. This is well exemplified by the “Chorros”, a system of (man-made) canals that run through parts of Corozal. The flood control functions of the Chorros is being altered, because they are not being maintained.

The core objective of advocating for responsible development practices and use of natural resources will be achieved by implementing the following strategic actions (Figure 6). These are described below.

**Figure 6: Strategic Objective 4 and Actions**



#### 1. *Establish the LTC as a multi-sectoral watchdog entity.*

Just as the LTC will serve as a type of “standards watchdog” that will monitor compliance of quality assurance protocols and requirements in order to improve and maintain service standards, the committee will also function as an “environmental watchdog”. In this latter role, the LTC will report to the relevant authorities any incidents or development activities that may

impact or are impacting the District's ecological systems. The membership of the committee may be expanded to include representation from the Forest Department, Coastal Zone Management Authority, Lands Department, Agriculture Department, and the Department of the Environment to facilitate engagement with such agencies. (The Fisheries Department is already represented on the LTC.) The LTC will also liaise with other committees, such as the Coastal Advisory Committee (when it is re-activated). Such liaisons will serve to allow for improved monitoring of infractions and facilitate effective and consistent enforcement of laws.

## ***2. Promote compliance of relevant laws and regulations.***

As “environmental watchdog”, the LTC will not have the wherewithal to monitor and report on all irresponsible development practices that negatively impact the environment. The LTC will therefore promote the formation of civic groups (such as neighborhood watch groups and environmental clubs) in Corozal Town and the villages to support its efforts to monitor infractions and facilitate effective and consistent enforcement of laws. The LTC will also advocate for the strengthening of the capacity of village councils to monitor developments in their area and enforce relevant local regulations. Environmental NGOs will play a key role in also serving as environmental watchdogs and promoting compliance of environmental laws and regulations. The LTC will therefore serve as a platform to voice concerns and to alert the relevant authorities and regulatory bodies.

## ***3. Establish an awards/incentive program that recognizes businesses, employees and events exemplifying both environmental and social corporate responsibility.***

Related to the quality assurance action (see Section 2.3.1), an awards program that recognizes the exemplary work carried out by service providers will be developed and implemented. The LTC will play a key role in determining which businesses are eligible for recognition on an annual basis. The awards program would recognize the work of tour operators, tour guides, restaurants, hotels and other accommodations, frontline employees, and so on. The program will be based on the BTB's National Tourism Awards program. Awards could be given in various categories, such as the following examples (suggested criteria included):

For hotels: Service exceeds excellence, engulfed with positive attitude and attentiveness of staff. Offers exceptional value for money, equipped with outstanding facilities and amenities, remarkable ambience, innovation and the ability to provide visitors with a truly authentic and all-encompassing Belize experience, and utilizes the best environmental practices and sound management.

For restaurants: Offers a dining experience and not just a meal or a routine. The menu offers diversity and the service is great. The personality of the restaurant is as distinct as the staff is professional. The restaurant utilizes the best environmental practices and sound management.

For tour operators: A licensed tour operator that offers a variety of tours which excels in service, marketing, creativity, uniqueness, safety, reliability, value for money and exemplifies a strong commitment to sustainable and innovative business practices.

For tour guides: A licensed tour guide with a wealth of knowledge, has the ability to mesmerize an audience, excellent communication and interpersonal skills, positive attitude, creativity, and the ability to provide a world class tour experience.

For frontline employees: A frontline employee who has unmatched interpersonal skills, the ability to welcome guests with great Belizean hospitality, is product knowledgeable about Belize and provides a memorable experience.

For festivals and cultural events: This award is in recognition of hallmark festivals or events including major exhibitions that: a) create substantial economic impact, b) Attract visitors (local and overseas), c) Generate national or international media profile; and d) positively promote the destination.

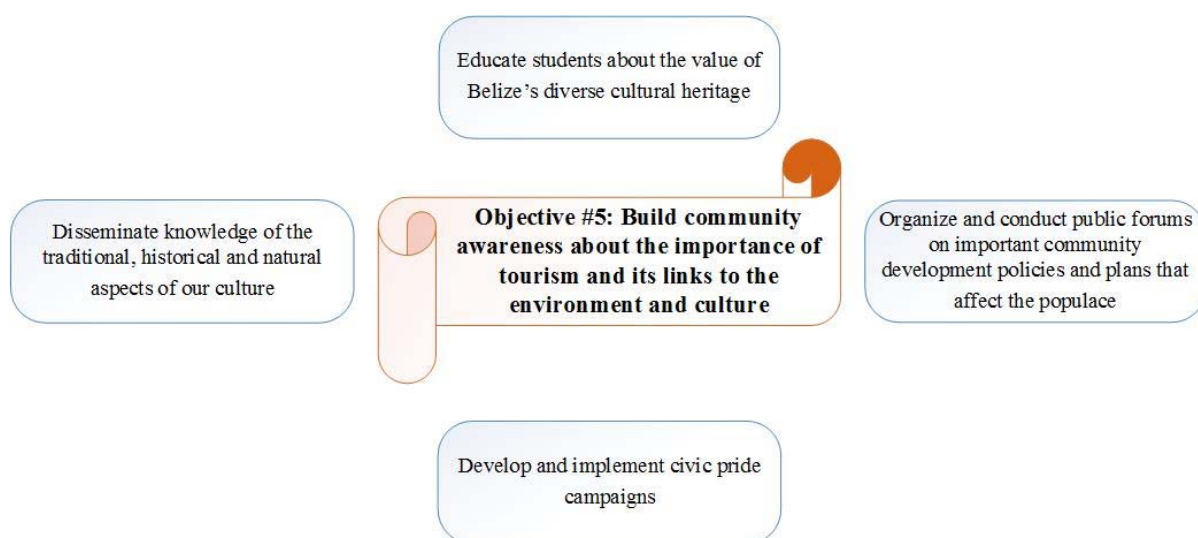
### **3.3.5 Objective #5: Build community awareness about the importance of tourism and its links to the environment and culture**

The planning team was of the opinion that achievement of the vision for Corozal's tourism development should first and foremost be for the benefit of the local people. Foreign visitors would be most welcome to experience Corozal as a vibrant, family-friendly, nature-based, cultural destination with diverse tourism experiences and attractions. The main beneficiaries of tourism (and community) development would be the residents of Corozal and the rest of Belize. Tourism development goes hand in glove with community development. However, the latter has occurred haphazardly at best even though a municipal development plan is in place for Corozal Town and a tourism development plan has been in place for Sarteneja Village – both for several years.

The external environment scan (see Section 2.1) listed key external social issues and trends that have impacted the community development and the growth of the Corozal tourism industry. The social issues identified included the sense that there seems to be a lack of leadership and citizens' passion for Belize. Leaders lack development vision and sound business principles. The collaborative spirit among citizens and business owners leaves a lot to be desired; it is difficult for people to work together. A pervasive lack of environmental awareness, compounded by the inconsistent enforcement of laws and compliance with regulations, speak to a complacent and frustrated (“feeling helpless”) society. Civic and cultural pride are also severely lacking. The former contributes to the ubiquitous littering problem and unkempt lawns, among other eyesores and public health hazards. Limited cultural pride among the youth has been contributing to the gradual loss of cultural expressions and traditional beliefs and practices.

The core objective of building community awareness about the importance of tourism and its links to the environment and culture will be achieved by implementing the following strategic actions (Figure 7). These are described below.

**Figure 7: Strategic Objective 5 and Actions**



**1. *Educate students about the value of Belize's diverse cultural heritage.***

The LTC, with the support of NICH, will commit to actions aimed at preserving and analyzing knowledge of the traditional, historical and natural aspects of Corozal's culture. This will be done by developing educational and cultural awareness programs about Corozal's tangible and intangible cultural heritage targeting students at the primary, secondary and tertiary level. These tangible and intangible forms of cultural heritage include: 1) Ethnicity, 2) Language and Oral Traditions, 3) Traditional Skills and Handicraft, 4) Music, Drama and Literary Arts, 5) Traditional Medicine, 6) Family and Religion, 7) Research, Cultural documentation, Archiving and Safeguarding, 8) Archaeological and Historical Antiquities and Monuments, 9) Colonial Sites and Landmarks, and 10) National Days. A few of these are described below<sup>11</sup>.

**Ethnicity:** The country of Belize – and Corozal is no exception – is comprised of various ethnic groups. Each ethnic group presents a set of cultural characteristics regarding history, language, music, dress, religion and ancestry. However, many of these characteristics are not exclusive to any one group since patterns of settlement and resettlement and intermingling have allowed for the introduction and adaptation of many cultural forms.

**Music:** Belizean music is a combination of indigenous and recently evolved genres influenced historically by regional and local events. The presence of these combinations offers the opportunity for Belizeans to continue to explore the depths of our creativity. It is believed that such creative forms allow for the expression of our Belizean identity and allows for that identity to forge social cohesion and to thereby project our Belizean identity into international contexts. Furthermore, music as a culture industry is a viable alternative directly related to empowering our young people and offers real opportunities for employment and wealth creation.

<sup>11</sup> Source: The National Culture Policy of Belize (2013)

Traditional Skills and Handicraft: There are a number of traditional skills currently practiced in Belize. These skills include: music-making, weaving, woodworking, dorey-building, wire working, cooking, carpentry, sewing and others. Many of these skills are at risk of being lost.

Traditional Medicine: Even before the establishment of conventional practices in medicine in Belize, residents relied on the use of nature-based remedies for healing. Today, herbal medicines and non-conventional healing practices are recognized for their health benefits. In Corozal, such non-conventional methods are still nurtured and practiced among Belize's ethnic groups.

Archaeological and historical antiquities and monuments: The physical remains of the ancient Maya civilization have allowed for the restoration, conservation and establishment of Maya archaeological sites and reserves for the purpose of education and tourism (see Section 2.3.2).

## ***2. Disseminate knowledge of the traditional, historical and natural aspects of our culture.***

The LTC will support NICH in the dissemination of knowledge of the traditional, historical and natural aspects of Corozal's culture. This knowledge dissemination will be for the benefit of the residents of Corozal, as well as visitors to Corozal. Fairs and festivals focused and based on such tangible and intangible cultural heritage described above will be organized for the purpose of projecting cultural characteristics of Corozal's people and to provide a platform for the transfer of cultural knowledge in its many forms. The organization and presentation of such festivals will assist with community cohesion and identity-building, which can then be used to derive economic benefits. Also, events such as ***Art in the Park*** will be fostered and promoted in order to display the number of traditional skills currently practiced in Corozal. Many of these skills provide an opportunity for income generation through the production of authentic products.

## ***3. Develop and implement civic pride campaigns.***

The LTC – in partnership with the town/village councils, the BTIA Corozal Chapter, the private sector, and schools – will spearhead a civic pride campaign (an “I am Corozal” campaign) that will focus on instilling a sense of community ownership and pride among the citizenry of the District as a whole. In partnership with the education and environmental/conservations sectors, the LTC will also promote and encourage the formation of environmental clubs at the local high schools and junior colleges. These clubs can play a key role at galvanizing the youth to support the civic pride campaigns.

For the civic pride campaigns to be successful over the medium to long-term, however, the municipal governments would need to promptly and fairly enforce penalties and fines (as laid out in the laws) related to littering. The LTC will liaise with the town/village councils to ensure that this occurs.

For the short to medium-term, and consistent with the Municipal Development Plan, the LTC will lobby the Corozal Town Council and Central Government to develop and introduce a Garbage Management Project related to the National Solid Waste Management Program. A

medium to long-term objective will be to expand the municipal waste management project to sort garbage into organics and inorganics for proper disposal and treatment.

**4. *Organize and conduct public forums on important community development policies and plans that affect the populace.***

The LTC – in partnership with the junior colleges, private sector associations, municipal government, and the relevant government agencies – will promote and encourage relevant agencies to undertake presentations and public forums that focus on local and national policies and plans such as the NSTMP, the Corozal and Sarteneja Tourism Development Plans, the Corozal Municipal Development Plan, the National Culture Policy, Corozal Bay Wildlife Sanctuary management and monitoring plans, the National Protected Areas System Plan, among others. The purpose of the forums and presentations will be for the residents to understand the various policies and plans, what they aim to accomplish, and how this may affect their way of life and livelihoods. Informed residents will be able to more meaningfully advocate for proper municipal planning and development planning for their community and District. The forums and meetings would also provide an opportunity to present about the socio-economic benefits of tourism referring to existing models and successful examples in the District and Belize.

**3.3.6 Objective #6: Develop and implement multiplatform marketing strategies that promote Corozal's brand**

In the Corozal District, excursion operators and other service providers are faced with the following challenges related to marketing and product development. These challenges are well summarized in the discussion below, adapted from the report *“Pro-poor (inclusive) value chain analysis and recommendations for the Belize Sustainable Tourism Program II, specific to Corozal & Toledo Districts”* (Action for Enterprise, August 2015).

One complaint is that there is a lack of information available to tourists to advise them about existing tourism excursion products/services in the District. The result is that few visitors spend more than one night there, if at all. While guidebooks and the BTB website give a nod to Corozal (mostly the town), descriptions are limited to a few paragraphs or a page or two, leaving much to be desired. With the growing population of expatriates living in the District a few web portals have emerged, for both community and business purposes. These existing web portals lack design and functionality to really intrigue tourists to stay in the area. A significant gap is the lack of a map of the District tourist attractions which is practical and informative.

Government marketing initiatives have focused on areas closer to Belize City and the international airport. Given the distance of Corozal to the popular tourism hubs (such as San Pedro, Placencia and San Ignacio), less attention has been given to Corozal. As they Corozal is more remote, it takes more time, sense of adventure, and personal interest for a tourist to make it the District. Tapping into those markets proves to be a challenge for the Corozal tourism market actors. Adding to the challenge is that Corozal has not necessarily fit the tourist market segment for which Belize is typically marketed (mid-to-high end, mostly American, all-inclusive/prepaid markets). Given that this market is the BTB's focus, it will be critical for

the private sector to be proactive in marketing for themselves (as individual businesses or collectively).

Mexico has been noted as one of several potential markets, but little is known about the travel capabilities and preferences of this market. For instance, it is unclear to many market actors whether Mexican residents must have a passport, car insurance, and/or proof of accommodation bookings before crossing into the District.

Making it more challenging to reach new or expand existing markets are the limited human resources (both in terms of time and skills) to develop and effectively utilize online marketing, particularly use of social media and other online platforms. There seems to be a general understanding of the importance of website presence in the tourism industry. Several entities have at least a Facebook page. Several more experienced accommodations and restaurants have a presence on Trip Advisor, which has facilitated online bookings. Websites that exist have basic information and functionality, but generally lack aesthetic appeal.

At this time, it is difficult to put a finger on the “vibe” of the Corozal District and why people would find it unique. Most people highlight the area as being a friendly, relaxing place to unwind. This same description is captured on the BTB website, [www.travelbelize.org](http://www.travelbelize.org). Now that a vision for the future of tourism in Corozal has been developed, the existing and proposed products and services will need to be fully consistent with this vision.

Most tours originating in Corozal are actually to sites outside of the District such as Lamanai, Altun Ha, cave tubing, ziplining, etc., which are the same tours marketed to cruise ships for day excursions. Several tours are available in the District, however, including Bay trips to the northern cayes (i.e., Bacalar Chico/ Ambergris Caye), but few have the reputations and years of experience to add up to full time employment as of yet. Many accommodations will call a local taxi driver they regularly use to take guests to one of the archaeological sites, but technically taxi drivers are not certified tour operators or guides and are not supposed to be providing any additional services beyond transportation. (Taxi drivers could be freelance tour guides if they have received the training and are certified.)

The core objective of developing and implementing multiplatform marketing strategies that promote Corozal’s brand will be achieved by implementing the following strategic actions (Figure 8). These are described below.

**Figure 8: Strategic Objective 6 and Actions**



**1. *Participatory development and implementation of a tourism marketing plan.***

The LTC will lead a participatory process to develop a comprehensive tourism marketing plan for the Corozal District, in partnership with and with the support of the BTB. As a precursor to preparing the marketing plan, information about alternative markets, as well as current visitation and satisfaction at the local destination level will be obtained. The BTB will provide the local destination data for the marketing planning process. The lack of understanding of these aspects have made several enterprises unsure of, for example, the barriers to attracting the Mexican market in the first place. The marketing plan will focus on attracting new/alternative markets (such as the Mexican market), as well as increasing the attractiveness and draw of Corozal as a destination for domestic and North American travelers.

The marketing plan will also identify the most direct linkages to Corozal from various tourist origins and focus on the most convenient ways to transfer these travelers to Corozal (via air, land and sea; new flights, express first class buses, etc.).

**2. *Conduct market analysis of potential excursion packages.***

A market analysis of potential excursion packages (incorporating various combinations of the excursion options) will be carried out in order to identify current trends, interests and opportunities. This will include conducting cost-benefit analyses of the various excursion options (considering costs associated with licensing, insurance, equipment rental, and so on). The BTB will support the market analysis process by collecting and sharing destination data.

**3. *Create and reinforce a destination brand for Corozal.***

In line with the priorities defined by the BTB and the NSTMP, Corozal tourism industry stakeholders will be supported in creating a destination brand for their area. While implementing the marketing plan will improve Corozal's competitiveness as a major tourism



destination, the focus of the marketing plan will be to position Corozal as a unique destination in its own right: “A vibrant, family-friendly, nature-based, cultural destination with diverse tourism experiences and attractions developed in an equitable and sustainable manner”. The marketing plan will therefore provide the clarity and agreement District-wide needed to effectively market the area for future tourism development. By so doing, a “brand” for the Corozal District which is collectively marketed will be developed.

***4. Establish private and public sector partnerships to promote Corozal as a tourism destination.***

Private sector tourism associations such as the BTIA and BHA conduct their own marketing initiatives. BTIA, for example, publishes Belize’s signature tourism publication “Destination Belize” on an annual basis. Companies such as McNab Publishing publish “Flavors of Belize” and “Invest Belize”, which features Belize’s culinary experiences and investment opportunities, also on an annual basis. The BTB operates and maintains the website “travelbelize.com”, which highlights all of Belize’s tourism destinations. Belize’s Embassy in Mexico maintains an active and popular Facebook page that markets Belize’s within Mexico City, one of the world’s most populated cities. The LTC will ensure that the marketing of Corozal’s unique tourism brand capitalizes on such existing marketing initiatives, as well as other marketing opportunities, such as the cooperative development and dissemination of promotional brochures and websites. The Corozal BTIA Chapter will play a key role by fostering collaborative marketing initiatives among its members, namely, among their hotel, restaurant and tour operator members.

***5. Integrate and promote digital marketing platforms to showcase Corozal nationally and internationally.***

High costs of building and maintaining a web presence as well as limited skills and experience to effectively use information & communication technology (ICT) have probably resulted in the minimal use of digital portals to market Corozal and its various sites and attractions. Overall there is a lack of experience and understanding of online opportunities and use of social media. In order to reach desired target markets, additional understanding and efforts are necessary to advance tourism bookings to the relatively remote and unknown areas within Corozal. Making it more challenging to reach new or expand existing markets are the limited human resources (both in terms of time and skills) to develop and effectively utilize online marketing, particularly use of social media and other online platforms.

The LTC will partner with local digital marketing experts or companies to expand and improve the use of digital marketing platforms to showcase Corozal. This will include designing and launching a Corozal Destination website that has the right level of information and functionality and also has aesthetic appeal. Training opportunities (for a fee) will be provided via these same digital marketing companies to interested service providers such as tour operators, restaurants and hotels. These training opportunities will focus on the use of social media platforms such as Facebook, Instagram, TripAdvisor to increase the visibility of the service providers and business traffic to them.

### 3.4 Tourism Investment Project Ideas

#### 3.4.1 Identification of Priority Infrastructure

Table 7 contains investment project ideas (with broad cost projections) for improving the product that Corozal will provide.

**Table 7: Corozal priority infrastructure proposals**

<b>Caye Caulker priority infrastructure proposals</b>			
	<b>Project Ideas</b>	<b>Description</b>	<b>Projected Cost (BZ\$) (Indicative)<sup>12</sup></b>
1	Bayside boardwalk and waterfront neighborhood	A transformative urban amenity anchoring the town's role as gateway to the bay, welcoming visitors and locals with a variety of leisure oriented activities and services. The boardwalk, which will be located in the Old Market area, will incorporate a visitor's center, tourist pier, shops and restaurants located on and near the boardwalk. Water excursions to points around the bay will depart from its pier. Space will be provided for events, bazaars and community gatherings and effectively link the townscape to the sea from which it is largely shielded. This is to serve as an arts and entertainment quarter	\$500,000
2	Promenade	A promenade linked to the boardwalk to promote investment in leisure-oriented businesses in the adjacent neighborhood. Traffic management measures such as detouring heavy vehicle traffic to a bypass during weekends/holidays will be incorporated to create a more pedestrian-friendly environment.	\$300,000
3	Shoreline stabilization	A program of shoreline stabilization measures at eroded points to address deterioration, consolidate coastal areas and create spaces for promenades and seaside parks. This project will be combined with that of the proposed seaside boardwalk in the town's center and with the tourist pier proposal as feasible.	?? <sup>13</sup>
4	South end park project	The park would be developed in the southern entrance of Corozal Town in the area across the road from Hotel Maya. The park will provide a range of recreational activities, such as swimming, picnicking. Paths for walking and bicycling would also be provided. Urban furniture such as walkways, pedestrian bridges, street lamps, traffic barriers, benches, fountains and waste receptacles will be placed throughout the park. The park's design would include proper facilities to host cultural presentations and special events.	\$1,500,000 <sup>14</sup>
5	Santa Rita site management	Improvements such as perimeter fencing, facilities for ticket sales and for the site guard, improved walkways to the structure and defined stairways, a space for events, night time illumination. The plan can include additional public property adjacent (currently a playground) and include a sustainable framework for hosting weddings and other ceremonies within the site by day and by night.	\$233,000 <sup>15</sup>

<sup>12</sup> These are very broad cost projections and should not be considered accurate.

<sup>13</sup> The budget for shoreline stabilization will be determined by the MTCA.

<sup>14</sup> Estimate is based on "Urban Acupuncture" design for prepared by Juan Carlos Menzies.

<sup>15</sup> Based on Santa Rita Archaeological Park and Wedding Garden Project Budget (BTIA Corozal).

6	Cerros site management	Undertake light works: install a new well for fresh water, improve a waterside site to host weddings, grant a concession to operate a simple food outlet on a seasonal basis, institute pest control measures if feasible.	\$100,000
7	Public docking facilities	Stable public dock (wharf) for regular use by water taxis and touring cruisers at Sarteneja. Incorporate public use facilities, such as restrooms.	\$100,000
8	Signage	Well-designed welcoming, directional (way-finding), and location signs within Corozal District and the town and villages to facilitate visitors during their stay.	\$75,000

### 3.4.2 Needs for Private Sector engagement

As the umbrella organization for tourism, the BTIA can provide leadership via its chapter in Corozal by cultivating a unity of vision and by helping the various market actors secure some needed types of training to operate better and to get access to finance sources that will underpin capital investments.

The BTIA could partner with the BTB to strengthen the businesses running excursions to do a better job of packaging them, pricing them and marketing them. BTIA could advise the excursion operators on the techniques of formulating inclusive tours and on the pricing and marketing of them to target markets.

In addition, some Belize operators may wish to enter the inclusive package tour industry which competes internationally and involves a higher level of risk. SMEs eyeing this field will need such orientation as to marketing, pricing, risk and so on. This may be a good opportunity since the foreign tour operators are bypassing Corozal to focus on only the few proven destinations. As regards small scale lodging, B&B, inns and guest houses, similar training is needed for the owners. In addition, expertise is needed to orient the owners in the selection of the most suitable booking channels to use in the world of social media and e-marketing.

## 4. Coordination and Monitoring

The following coordination and monitoring process is hereby proposed as the mechanism for tracking progress of the TDDP's implementation and ensuring compliance with assigned responsibilities within the Plan. The process includes the following steps:

- The LTC Chairperson and the MTCCA focal point collect quarterly updated objective summary/status reports (see Annex 4 – Quarterly Status Report Form) from the respective sector representatives on the LTC.
- The LTC Chairperson and the MTCCA focal point ensures that all objectives have been accounted for and strategic actions have been implemented, according to the annual action plans.
- Include monitoring of TDDP implementation as a recurrent agenda item for LTC meetings; this can be done via quarterly reports to the MTCCA.
- The LTC Chairperson and the MTCCA focal point make note of unfinished objectives (shortfalls), needs for readjustments of outcomes and target dates (re-forecasts), meetings to be called, etc., on a bi-monthly basis. This can be done using the Objectives,

Responsibilities and Targets (ORT) form (see Annex 5 – Objective, Responsibilities and Targets (ORT) Report Form).

- The LTC Chairperson and the MTCCA focal point documents progress of TDDP implementation in a brief inter-sectoral memorandum on a quarterly basis to all TDDP participants and sector representatives on the LTC.
- The TDDP is to be generally monitored through quarterly internal review sessions, annual review sessions, and a mid-term evaluation.
- Based on the results of the annual review, a revised action plan will be developed for the upcoming year.
- Progress of TDDP implementation is to be evaluated at annual LTC Retreats. Such evaluation may need to be facilitated by an external consultant. The evaluation results will be shared via public media to keep community informed.



**Photo 2: Kakantulix, Corozal District (Copyright: 2014 Tony Rath Photography/tonyrath.com)**

### **SECTION 3: STRATEGIC OBJECTIVES AND ACTIONS**

Tactical (prioritized)	Objectives	Responsibility/ Partner Agency	Target Date
<b><i>Purpose: Highly improved standards and quality of tourism products and services in Corozal</i></b>			
<b>Objective #1: Improve the Capacity of Tourism Service Providers and Front-Line Personnel</b>			
1. Conduct training and workshops in customer service		BTEC, BIM, etc.	2016-ongoing
2. Educate service providers and personnel working at tourism attractions and sites		BTIA, BTEC, BIM, etc.	2016-ongoing
3. Design and conduct entrepreneurial and small business development training		SBDC Belize	2017-ongoing
4. Facilitate and advocate for fiscal incentives for emerging operators and tourism service providers		LTC via BELTRAIDE	2016-2017
5. Strengthen and expand tourism inter-sector networking		LTC, MTCCA	2016-ongoing
6. Formalize the Local Tourism Committees as the lead tourism advisory entity within the MTCCA		MTCCA	2016
7. Institute quality assurance to ensure that service standards are improved and maintained		BTB	2017-ongoing
8. Advocate for enforcement of regulations in partnership with the local and national authorities		LTC, municipal governments, Health Department, BTB	2017-ongoing
<b>Strategic Objective #2: Develop tourism amenities and facilities at major tourism attractions</b>			
1. Design and install public facilities along the Bay and at other sites		Corozal Town Council, MTCCA and BTB (STPII)	2016-2020
2. Design and install a proper signage system		Corozal Town Council, village councils, MTCCA and BTB (STPII), Department of Transport	2017-2018
3. Identify and improve cultural attractions and traditional cultural events in Corozal Town and villages		NICH, culture groups, Corozal HOC, BTIA-Corozal	2016
4. Develop Cerros and Santa Rita as sites for special events and commemorations		BTIA-Corozal, Institute of Archaeology/NICH	2016-2017
5. Secure the Kakantulix and “Aventura” archaeological sites		Institute of Archaeology/NICH	2016-2017
6. Develop a tourist map showing points of interests and attractions		BTIA-Corozal, STGA, BTB	2016
7. Develop improved interpretation and experiential tourism opportunities		Wildtracks, BTIA-Corozal, STGA, CHOC	2016

<b><i>Purpose: Increased opportunities for equitable tourism benefits</i></b>		
<b>Strategic Objective #3: Develop and expand tourism excursion options in the District</b>		
1. Develop excursions/tours utilizing the Corozal Bay and the New River	BTIA-Corozal, tour operators	2016
2. Develop the capacity of tour operators to market their services and products	BTB, BTIA	2016
3. Liaise with regulatory agencies to facilitate licensing of tour operators and their services	MTCCA, LTC	2017
4. Strengthen the local BTIA Chapter's capacity as a destination management agency	BTIA	2017
<b>Objective #4: Advocate for responsible development practices and use of natural resources</b>		
1. Establish the LTC as a multi-sectoral watchdog entity	MTCCA	2017
2. Promote compliance of relevant laws and regulations	LTC, environmental NGOs, civic groups	2016-ongoing
3. Establish an awards/incentive program that recognizes businesses, employees and events exemplifying both environmental and social corporate responsibility	BTB, BTIA-Corozal	2017-2018
<b>Objective #5: Build community awareness about the importance of tourism and its links to the environment and culture</b>		
1. Educate students about the value of Belize's diverse cultural heritage	NICH, CHOC, culture groups	2017
2. Disseminate knowledge of the traditional, historical and natural aspects of our culture	NICH, CHOC, culture groups	2017
3. Develop and implement civic pride campaigns	BTIA-Corozal, Town/Village Councils, BTB	2016-ongoing
4. Organize and conduct public forums on important community development policies and plans that affect the populace	LTC, BTIA-Corozal	2017-ongoing
<b><i>Purpose: Increased and sustained tourist arrivals and overnight stays in Corozal</i></b>		
<b>Objective #6: Develop and implement multiplatform marketing strategies that promote Corozal's brand</b>		
1. Participatory development and implementation of a strategic tourism marketing plan	LTC, BTIA-Corozal, BTB, Consultants	2016
2. Conduct market analysis of potential excursion packages	BTB, Consultants	2017
3. Create and reinforce a destination brand for Corozal	BTB, LTC	2016-2017
4. Establish private and public sector partnerships to promote Corozal as a tourism destination	BTIA, BHA	2016-2017

5. Integrate and promote digital marketing platforms to showcase Corozal nationally and internationally	BTIA-Corozal, digital marketing companies	2017
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**Photo 3: Mother Sculpture, Corozal Town**



## **SECTION 4: IMPLEMENTATION SCHEDULE**

[illegible]

4. Develop Cerros and Santa Rita as sites for special events and commemorations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Secure the Kakantulix and “Aventura” archaeological sites	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Develop a tourist map showing points of interests and attractions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Develop improved interpretation and experiential tourism opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b><i>Purpose: Increased opportunities for equitable tourism benefits</i></b>																				
<b>Strategic Objective #3: Develop and expand tourism excursion options in the District</b>																				
1. Develop excursions/tours utilizing the Corozal Bay and the New River	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Develop the capacity of tour operators to market their services and products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Liaise with regulatory agencies to facilitate licensing of tour operators and their services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Strengthen the local BTIA Chapter’s capacity as a destination management agency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Objective #4: Advocate for responsible development practices and use of natural resources</b>																				
1. Establish the LTC as a multi-sectoral watchdog entity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Promote compliance of relevant laws and regulations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Establish an awards/incentive program that recognizes businesses exemplifying both environmental and social corporate responsibility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Objective #5: Build community awareness about the importance of tourism and its links to the environment and culture</b>																				
1. Educate students about the value of Belize’s diverse cultural heritage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Disseminate knowledge of the traditional, historical and natural aspects of our culture																			
3. Develop and implement civic pride campaigns																			
4. Organize and conduct public forums on important community development policies and plans that affect the populace																			
<b><i>Purpose: Increased and sustained tourist arrivals and overnight stays in Corozal</i></b>																			
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1. Participatory development and implementation of a strategic tourism marketing plan																			
2. Conduct market analysis of potential excursion packages																			
3. Create and reinforce a destination brand for Corozal																			
4. Establish private and public sector partnerships to promote Corozal as a tourism destination																			
5. Integrate and promote digital marketing platforms to showcase Corozal nationally and internationally																			

# **ANNEXES**

### *Annex 1 – LTC members and other stakeholders*

Corozal Local Tourism Committee			
Name	Organization	Email Contact	Telephone Contact
Brad Moore	Focus	<a href="mailto:belizebrad@yahoo.com">belizebrad@yahoo.com</a>	651-3518
Dahlia Castillo	Tony's Inn and Beach Resort (BTIA)	<a href="mailto:dcastillo112@yahoo.com">dcastillo112@yahoo.com</a>	610-1254
Debra Wilkes	NICH (HOC)	<a href="mailto:corozal.hoc@nichbelize.org">corozal.hoc@nichbelize.org</a>	422-0071
Elva Perez	CTC	<a href="mailto:gialpower76@yahoo.com">gialpower76@yahoo.com</a>	630-6098
Ervin Wade	Casa Blanca Hotel by the Sea	<a href="mailto:ejwade@casablancabelize.com">ejwade@casablancabelize.com</a>	423-1018
Froylan Gilharry	COEICH	<a href="mailto:froylangilharry4@gmail.com">froylangilharry4@gmail.com</a>	627-4445
Henry Menzies	Belize VIP Tranfer Services	<a href="mailto:info@gettransfers.com">info@gettransfers.com</a>	422-2725
Hugo Castillo	SACD	<a href="mailto:castillohugo@gmail.com">castillohugo@gmail.com</a>	629-2362
Joanna Magana	COLCHA	<a href="mailto:joframagana@gmail.com">joframagana@gmail.com</a>	610-2521
Joel Verde	SACD	<a href="mailto:sacdsarteneja@gmail.com">sacdsarteneja@gmail.com</a>	600-4507
Juliet Neal	MTCCA	<a href="mailto:juliet.neal@tourism.gov.bz">juliet.neal@tourism.gov.bz</a>	227-2801
Kevin Gonzalez	Belize Tourism Board	<a href="mailto:kevin@travelbelize.org">kevin@travelbelize.org</a>	637-1977
Liz Riverol	CJC- Marketing	<a href="mailto:lriverol@cjc.edu.bz">lriverol@cjc.edu.bz</a>	600-6479
Lynn Carpenter	Almond Tree Hotel and Resort	<a href="mailto:info@almondtreeresort.com">info@almondtreeresort.com</a>	628-9224/422-0006
Nidia May	Jo Melin Restaurant		402-2526/660-7054
P. Esther McField	COEICH	<a href="mailto:emcfield77@yahoo.com">emcfield77@yahoo.com</a>	629-4187
Rafael Castillo	Corozal Town Council	<a href="mailto:rascas79@gmail.com">rascas79@gmail.com</a>	634-4807
Rosita May	BTIA & NICH	<a href="mailto:hotelmaya@btl.net">hotelmaya@btl.net</a>	422-2082
Silverio Marin	Focus	<a href="mailto:marin_silverio@yahoo.com">marin_silverio@yahoo.com</a>	623-7547
Sylvia Perez	COEICH	<a href="mailto:sylviaperez1@yahoo.com">sylviaperez1@yahoo.com</a>	600-7801
Valentin Rosado	BTIA	<a href="mailto:gvrosado@yahoo.com">gvrosado@yahoo.com</a>	602-2100
Willard Levy	NEMO	<a href="mailto:willard.levy@nemo.org.bz">willard.levy@nemo.org.bz</a>	623-0237
Yvette Riverol	COEICH	<a href="mailto:yriverol@cjc.edu.bz">yriverol@cjc.edu.bz</a>	600-7163
Zoe Walker	Wildtracks	<a href="mailto:office@wildtracksbelize.org">office@wildtracksbelize.org</a>	650-6578

## *Annex 2 – PESTE Analysis Results*

<p><b>Social</b></p>	<ul style="list-style-type: none"> <li>• Social issues are characterized by the high illiteracy rate in the region, the increased cost of health care and education, limited employment opportunities, and limited and underdeveloped human capital.</li> <li>• There seems to be a lack of leadership, as well as complacency; leaders lack development vision and sound business principles, etc.</li> <li>• However, there are still thriving businesses in Corozal; this means that the challenges are not so severe that people have to leave</li> <li>• A pervasive lack of environmental awareness and civic pride, compounded by the inconsistent enforcement of laws and compliance with regulations, speak to a complacent and frustrated (feeling helpless) society.</li> <li>• There is apparently a lack of leaders and citizens with a passion for Belize</li> <li>• There is little collaborative spirit, and it's difficult to get people to work together</li> <li>• There are many educated kids in Corozal that go to get opportunities abroad</li> <li>• Older people need attended to as well to look at education a different way</li> <li>• We need to develop human capital. Areas considered hotspots (like San Pedro) are the only areas where people have been taught to make sure that they cater to the needs of tourists and to find ways to make their money. In Corozal very few service providers take the time to educate Belizeans -- if this is done people will become entrepreneurs. ITVET Corozal should play a greater role but may require restructuring.</li> <li>• People don't cooperate because everything is very partisan political</li> <li>• There is marginalization of local populations. Systems are poorly regulated, so businesses do not have the information to create meaningful employment, better manage their own business, and benefit the local community <ul style="list-style-type: none"> <li>○ Tourism investments also need to improve standards -- restaurants have health and safety problems, and small business are subjected to many regulations</li> <li>○ Property value is high and poor people can't buy</li> </ul> </li> <li>• For whom are we planning? The poor? The marginalized? A lot of people in Corozal Town are running guest<del>ts</del>s houses and other establishments under the radar. The thresholds should be removed completely and higher heritage fees for visitors who buy land in Belize be introduced</li> <li>• Liquor laws are often abused</li> <li>• Migration of younger population due to the lack of diverse employment opportunities for educated individuals.</li> </ul>
<p><b>Economic</b></p>	<ul style="list-style-type: none"> <li>• Corozal has the highest poverty rates in Belize, as pointed out by the recent Poverty Assessment Report. The economy of the northern districts has been negatively impacted as a result of underperforming papaya production, the sugar industry crisis, the slow down at the Corozal</li> </ul>

	<p>Commercial Free Zone, a lack of productive industry, the politicization of the import permitting system, and a sub-standard public transportation system.</p> <ul style="list-style-type: none"> <li>• This has resulted in substandard and meager agricultural development, and under-employment, among other economic ailments.</li> <li>• The thriving Belizean entrepreneurs in merchandising have been forced to close down due to new entrants into the market offering lower quality. Business licensing needs to have greater controls.</li> <li>• CFZ slowdown -- Mexico has been opening shopping malls and casinos; # Mexican visitors to the CFZ has reduced substantially due to CFZ negative publicity -- gives a bad impression to the whole country; there needs to be a different approach to the CFZ where the tourists can go in and shop. CFZ needs to be taken to a higher level with exclusive shopping at good value.</li> <li>• Tourism infrastructure limited or non-existent at tourism sites</li> <li>• Petrocaribe funds supporting infrastructure development</li> <li>• High incidence of contraband -- highly-connected people involved</li> <li>• Borrowing interest rates have reduced</li> <li>• RC: Little revenue is reinvested back into things in Corozal Town, like border infrastructure and CFZ infrastructure. <ul style="list-style-type: none"> <li>○ Government subventions is based on population but not on the needs of the community</li> <li>○ The US is forcing Belize to put in proper regulations to meet international standards – this has caused closure of many businesses (e.g., casino) so people lose jobs</li> <li>○ Hurricane Janet gave us a unique opportunity to rebuild the center of town. There is a municipal development plan for the town that covers some of this</li> <li>○ A development plan is needed for the district in order for us to move forward</li> <li>○ Belize has prosperity now (e.g., Superbond, Petro Caribe), but what happens further down the road when these loans need to be paid back?</li> </ul> </li> <li>• Lack of knowledge of funding availability might affect people's investment into projects. Also, how profitable it will be for them -- this is a fear. There has been a loss of local tourism to Mahahual. Belizeans contribute to 50% of their market and their plan is to increase this</li> <li>• More marketing is needed for Belizeans</li> </ul>
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	<ul style="list-style-type: none"> <li>○ Corozal is not catering to this – backpack tourism is lost but is an option</li> <li>• The Las Palmas hotel owner had a proposal to capture people going to the casino. He applied to the town council but it was not successful due to religious opposition</li> <li>• Taxation system is not equitable</li> </ul>
<b>Ecological</b>	<ul style="list-style-type: none"> <li>• The noise pollution in Corozal needs to be addressed</li> <li>• No safety standards in place for people using streets for building purposes</li> <li>• The large-scale use of agro-chemicals by Fruta Bomba Ltd has impacted human and wildlife health across the District;</li> <li>• Fruta Bomba has practically moved all their plantations to other areas such as Progreso; but their office are still near Aventura/San Joaquin so economic benefits still for Corozal</li> <li>• Apiculture has crashed – speculating that bee population has plummeted because of agrochemical use</li> <li>• The sewage and agricultural runoffs from southern Quintana Roo and the Corozal District along the Rio Hondo and into the Corozal/Chetumal Bay. The extent of this pollution is not accurately known due to a lack of monitoring systems.</li> <li>• The Corozal Bay, while almost certainly very polluted, nevertheless presents good opportunities for bi-national protection and management of the Bay's ecology and biological diversity (e.g., the Corozal Bay Wildlife Sanctuary, and the Sister City 2008 Agreement).</li> <li>• This opportunity may be hampered by the current lack of public interest and appreciation on such initiatives and little government follow through.</li> <li>• Large-scale development initiatives (such as Yakuna Bay and general Maya mounds in area) and associated plans for sea/bay dredging and mangrove clearing, are of great concern particularly because of limited available information and insufficiently publicized consultations related to these proposed developments.</li> <li>• There is limited culture of environmental advocacy in Corozal; however, SACD and Wildtracks engaging in bi-national initiatives, such as with ECOSUR</li> <li>• All in all, there is a limited understanding of environmental resources conservation and nature appreciation in District. This is well exemplified by the "Chorros", a system of (man-made) canals that run through parts of</li> </ul>

	<p>Corozal. The flood control functions of the Chorros is being altered, because they are not being maintained</p> <ul style="list-style-type: none"> <li>• There is limited exposure to climate change adaptation (e.g., deteriorating Corozal Town seawall)</li> <li>• Chicos Tortilla Factory (and other tortillerias) need to be monitored – pollution from these are affecting income for other businesses <ul style="list-style-type: none"> <li>○ Restaurants are dumping pollution right into the bay</li> </ul> </li> <li>• Workers at casinos are reporting respiratory problems</li> <li>• Fruta Bomba is using Roundup -- this is carcinogenic and increases health issues</li> <li>• Chetumal will have a new sewer system and runoff and drainage (silt and mud) will come to the Corozal Bay. We need higher collaboration with Mexico <ul style="list-style-type: none"> <li>○ If tourists know about the sewage pollution in the Chetumal Bay they will not want to go in the water there</li> </ul> </li> <li>• Some of the silt and mud might also be as a result of mangroves being cut down/destroyed as a result of political interference.</li> <li>• There is presently a lack of knowledge about the environment within primary schools.</li> <li>• Beyond the agricultural issues like chemical pollution, the rapid expansions of the Mennonites need to be looked at – there is the potential to lose a lot of forest <ul style="list-style-type: none"> <li>○ Locals in rural villages are selling their land to the Mennonites for little money</li> <li>○ Flooding and drainage patterns are changing – the Mennonites are even diverting water</li> </ul> </li> <li>• Laguna Seca is polluted</li> </ul>
<b>Political</b>	<ul style="list-style-type: none"> <li>• While just 5 years ago, there was a lack of understanding by national policymakers and leaders of the tourism industry's contribution to the national and local economy, there have been some improvements recently. The NSTMP and STP II studies (such as the Value Chain Analysis and the Market Study) are providing a much better understanding of the Corozal tourism industry and its potential for growth.</li> <li>• The views of local tourism stakeholders are now being considered through the Local Tourism Committee which provides a platform for tourism planning.</li> </ul>

	<ul style="list-style-type: none"> <li>• There is no political will and vision to broaden the scope of the tourism industry and the national tourism product: <ul style="list-style-type: none"> <li>○ Specifically, there has been no national effort to establish northern Belize as a viable tourism destination. Even though Corozal is the gateway to northern Belize bordering the vast Mexican market, the District's tourism potential has largely been ignored by the political leadership, exemplified by the age-old focus on San Pedro.</li> <li>○ Signs that this is changing include the renovation and modernization of the border crossing.</li> </ul> </li> <li>• While the Chetumal-San Pedro water taxi has diverted visitors (mostly backpackers) from Corozal Town, this presents an opportunity for another kind of market for Corozal.</li> <li>• The current Mayor of Corozal Town is very supportive of the BTIA Chapter's tourism development efforts, indicating that a change in attitude is taking place, at least at the local level.</li> <li>• However, the high degree of political partisanship in Belize affects the small entrepreneur.</li> <li>• Productivity in the work place vs labour department, Labour Unions and tourism.</li> <li>• Labour Department needs to work with employers to improve productivity. <ul style="list-style-type: none"> <li>○ Breaks, lunch breaks, cell phone and personal and business computers = 96% of companies including government office is close down between 11:30 am to 1:30 pm during the week. Some government office should be open on Saturday like post office, treasury, immigration and customs excise including the private banks.</li> <li>○ Holidays and Religious holidays vs Tourism</li> <li>○ The issue of overtime and double time pay on these days needs to be revisited</li> <li>○ Kills productivity and tourism on those days for micro business</li> </ul> </li> <li>• Political change needs to deal with Mexicans and others coming into Belize</li> <li>• Revenue collections do not allow for capital investment in tourism, so government needs to be lobbied to change present subventions so more can be done. Lots of things need to be funded by central government – in a municipality where only 34-35% of the people paid taxes (the lowest in the country?)—this has now increased to 66%. Trade license has fallen into</li> </ul>
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	<p>political favors and municipalities have been weak at attracting funding agencies</p> <ul style="list-style-type: none"> <li>• If something is a match for any party in power, it can work</li> <li>• Major problems are lack of political will to assist. Immigration and customs have always been a problem for the tourism industry. Who do you go to?</li> <li>• Accountability needs to be improved at the council and local government levels.</li> <li>• Tourism was not a national priority for Corozal. Agriculture (sugar cane, etc.) and the free zone are well established systems but no political will is there to address the challenges, and this will affect tourism development</li> <li>• Government is not investing in preparing students for vocational experiences at a young age (e.g., from primary school). The Ministry of Education needs to identify people who can help with these <ul style="list-style-type: none"> <li>○ ITVET is on life support. Why not turn this into a hospitality school? These investments are not being used. Vision and planning are lacking</li> </ul> </li> <li>• Current environmental laws (effluent regulations) do mention that someone can obtain a legal permit to pollute</li> </ul>
<b>Technological</b>	<ul style="list-style-type: none"> <li>• The road network... The Caledonia road (3 miles) and boat docking facility needs paving and upgrading (respectively);</li> <li>• In Corozal Town, 7th Avenue is paved now...</li> <li>• Major advances in technology... challenge and opportunity; there are capacity barriers;</li> <li>• Private sector not taking advantage of the technological resources that we have...</li> <li>• Use of social media platforms under-utilized...</li> <li>• A satellite internet Wi-Fi installation (with company from the US) for hot spots along the beach is underway</li> <li>• Lights are needed along the beaches as well as better Garbage bins</li> <li>• There are opportunities for green technology for us to tap into – e.g. converting agriculture fields to solar panel fields</li> </ul>

### *Annex 3 – Map of Corozal District*



## *Annex 4 – Quarterly Status Report Form*

[illegible]

### *Annex 5 – Objective, Responsibilities and Targets (ORT) Report Form*

[illegible]

## ***Annex 6 – Selected References***

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**MINISTRY OF TOURISM  
& CIVIL AVIATION**

106 South Street, Belize City

Telephone: 227-2801/02

Fax: 227-2810

Email: [info@tourism.gov.bz](mailto:info@tourism.gov.bz)

Website: [www.tourism.gov.bz](http://www.tourism.gov.bz)

Facebook: [www.facebook.com/motcbz](https://www.facebook.com/motcbz)