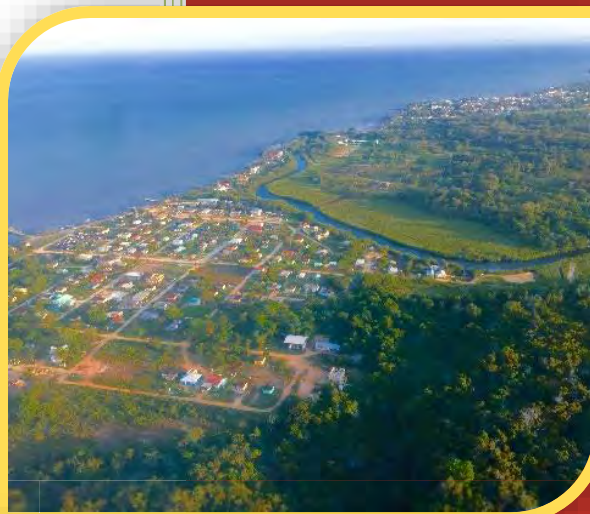


Destination Development Plan & Small Scale Investment Project Plan

Specific Focus on the Toledo District, Belize

2016 - 2020



Prepared for:



**MINISTRY OF TOURISM
& CIVIL AVIATION**

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Glossary:

BTB: Belize Tourism Board

BTIA: Belize Tourism

DDP: Destination Development Plan

EU: European Union

GDP: Gross Domestic Product

ITVET: Institute for Technical and Vocational Education and Training

LTC: Local Tourism Committee

NICH: National Institute for Culture and History

NLP: Nim Li Punit

NSTMP: National Sustainable Tourism Master Plan

LBT: Lubaantun

PGTB: Punta Gorda Town Board

PHMR: Port Honduras Marine Reserve

STP: Sustainable Tourism Program

VEMS: Visitor Exit and Motivation Study

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 Toledo 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

Executive Summary:

This destination development plan is geared for the development of tourism in the Toledo District. The aim of the plan is to encourage tourism growth, increase visitation, extend visitor stay and improve visitor experiences through structured development that coincides with industry trends.

Toledo is home to a unique blend of cultures and beautiful natural landscapes; yet Toledo presently receives the least amount of visitation in the county. Toledo's potential, niche and position in the tourism industry is still unrealized primarily due to uncoordinated planning and a lack of investment initiatives to support industry development.

Toledo's strategy for tourism growth lies in developing complimentary urban and rural infrastructure and positioning investment projects in areas to support tourism.

Toledo's key development areas are:

1. Downtown Welcome Area
 - a. Heritage Tour
 - b. Welcome Centre
 - c. House of Culture
2. Sea Side Promenade
 - a. Punta Gorda marina
3. Improving rural site infrastructure
4. Capacity Building

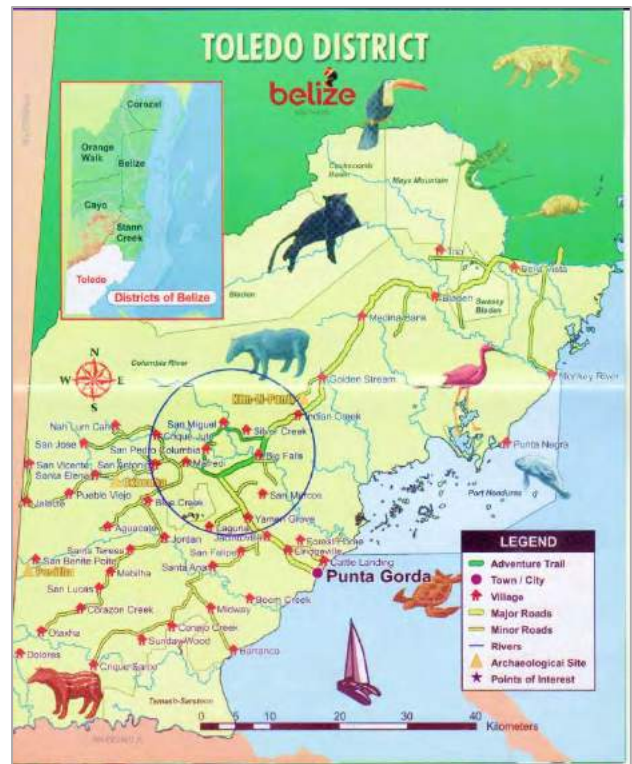


Figure 1 Map of Belize courtesy the Belize Tourism Board

Toledo's tourism highlights lie on special event planning and cultural events such as: Cacao fest, Fish Fest and the Battle of the Drums. The challenges the district is faced with are: 1. creating more special events to increase tourism and 2. Being able to link these typically urban events with Toledo's numerous rural satellite attractions.

By 2016 Toledo will have the added influence of cruise tourism from Harvest Caye and increased traffic along the newly paved Jalacte highway. It is essential that Toledo's niche, and brand are closely tied to tourism growth and that product development and placement coincide with the district's development needs. Better signage is needed across the district, online marketing needs to reflect Toledo's brand identity (Green, Sustainable, Responsible or Ecotourism), and a coordinated events calendar needs to be developed allowing all tourism stakeholders (both Private & Public) a participatory role to play in planning and execution.

Quality standards vary greatly throughout the sector and industry standards need to be met and maintained. Value chain development is critical for this and local awareness needs to be raised through training and capacity building for continued success.

Introduction:

The Toledo District is often considered the least most developed, yet most culturally diverse district in Belize. Its History dates back to Maya occupation of the Manche Chol cities such as Uxbenka and Lubaantun from 500 BC – 800 AD.

Eventually, these great cities declined, however the Manche Chol continued to inhabit Toledo throughout the 16th and 17th centuries, Eventually, European diseases such as smallpox decimated the Indian population and the entire population of Chols was transported to the highlands of Guatemala by the British.

Toledo was mostly unpopulated till 1832's when Garifuna exiles from Honduras settled in Punta Gorda. In 1868, Confederate soldiers seeking asylum at the end of the American Civil War settled in a spot called "Cattle Landing" just north of present day Punta Gorda to grow sugar. Due to a labour shortages on the sugar plantations in the late 1800's, indentured Indian labourers were brought to Toledo from Jamaica.

In the late 19th and early 20th centuries, Maya groups such as the Mopan and Kekchi, began migrating into Southern Belize from Guatemala, fleeing high taxation and persecution.

Toledo is a unique district with a diverse and complex history. Many of Belize's other cultures such as Maya, Mestizo and Mennonites have also integrated into the fabric of Toledo Culture.

The Under the National Sustainable Tourism Master Plan 2030, the tourism product in Toledo was identified as:

1. Nautical Tourism
2. Cultural Tourism
3. Sun and Beach Tourism
4. Ecotourism/Adventure

Based on this principle, this destination diagnostic covers the entire Toledo District in Southern Belize and will focus on:

1. Tourism potential of the destination
2. Current tourism product offered by the destination

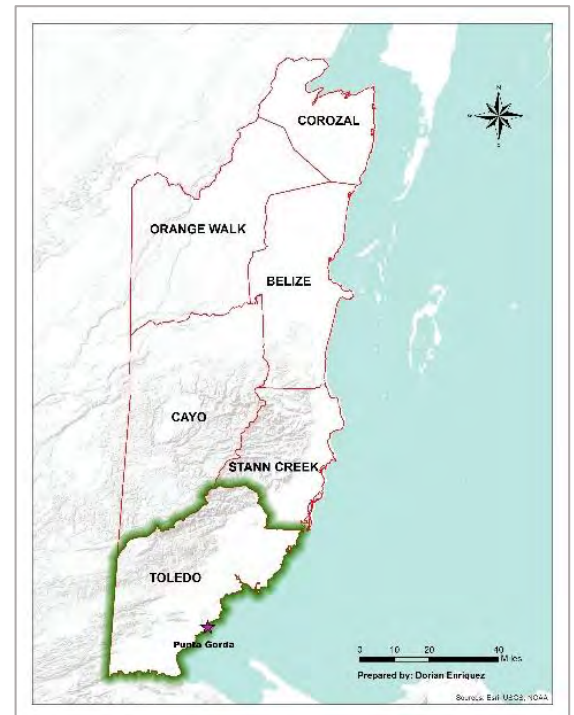


Figure 2 Map of Belize courtesy Dorian Enriquez

3. Characterizing tourism demands of the destination
4. Identifying Competitors
5. Capacity building measures for the District

Background:

Belize's long standing tourism product is firmly based on eco-tourism, Toledo is no exception to this as it exemplifies eco-tourism through the genres of cultural tourism & adventure tourism which compose its identity and exemplifies key components of the Districts character.

Toledo possesses an abundance of natural resources such as wildlife, marine environments, caves, flora and fauna and a wealth of cultural resources. It also boasts a melting pot of various ethnicities and cultures such as Mennonites, Maya, Garifuna, East Indians, Creole, and Asians.

Tourism in Belize holds excellent potential for growth, it positively fosters the GDP as the nation's largest export and foreign exchange earner, and directly employs about 12% of the country's workforce and approximately 30% indirectly from ancillary services.

The National Sustainable Tourism Master Plan 2012 – 2030 (NSTMP), developed under the International Development Bank's co-financed "Sustainable Tourism Program" (STP), encompasses the strategic priorities of the national development plan for the country building a sustainable tourism product.

Priority projects have been identified and executed in other destinations and hence this supporting consultancy is geared towards the further development of a destination development plan for the Toledo District.

Community Engagement:

Local participatory input has been critical in the development of the Toledo Destination Development Plan, the home grown tourism structure and nature of Toledo's "ecotourism" market require local planning on all levels. A local tourism committee (LTC) was convened by the Ministry of Tourism for planning and consultation. This committee is comprised of local tourism, transportation and Government and private sector officials. Throughout the consultation period, special additional membership has been suggested for the inclusion of cultural groups, statutory bodies (NICH) and non-Governmental Organizations.

Further input is still recommended from the local university and educational institutions such as the ITVET and Tumul Kin School in Blue Creek to improve local engagement and participatory planning for tourism attractions in the District.

Methodology:

The methodology undertaken for the development of the plan included:

- A comprehensive review of the National Sustainable Tourism Master Plan and all tourism strategies and development plans that impact Toledo.
- Consultation with the Local Tourism Committee to identify tourism market trends and local development goals.
- Conducting a tourism product audit for the Toledo District
- Review of the pre-commissioned studies by the Ministry of Tourism
- Individual consultations with the tourism stakeholders
- Online market review
- Develop destination diagnosis for each destination
- Validation workshop

The Destination Diagnostic employed the use of DIM Methodology (Diagnosis-Implementation-Monitor Methodology) to look at the Quality Competitiveness and Sustainability in each destination and combine different diagnostic methods to design future development strategies.

Project Objectives:

The objective of the Tourism Destination Development Plan for Toledo (*DDP Toledo*) is to enhance the District's tourism appeal and increase visitation by increasing capacity, product and quality as a destination.

Identify local tourism attractions and product gaps that can be improved to enhance the quality and competitiveness of the destination.

Align local tourism development with the goals of the Punta Gorda Municipal Development Plan, Horizon 2030 and the recommendations outlined within the National Sustainable Tourism Master Plan 2030.

Vision Statement:

Toledo's tourism product is built on its cultural uniqueness and richness in its marine and natural resources. Nothing captures this more than the welcome sign to Punta Gorda Town. To this end, Toledo's vision statement is best captured by combining the NSTMP and the *Toledo Responsible Policy*:

Vision Statement: To make Toledo a one of a kind tourism destination – recognizing the need to balance nature, culture and development in a sustainable manner.



Figure 3 Punta Gorda Welcome Sign

Situational Analysis:

Toledo District:

Toledo is Belize's southern-most District with a total area of 1,795 sq. miles or 4,649 Km², and a population of 30,785 people¹. It has the lowest population density in the country.

Toledo's capital and only urban centre of travel, trade and commerce is the town of Punta Gorda (*population 5,351*) which is located on the South-Eastern Coast of the district. *See Map*

The other 78% of the population is disbursed in a total of fifty one (51) rural villages throughout the district.

The cultural composition of the District is highly diverse with populations of Maya, Garifuna, East Indians, Mennonites, Creoles, Mestizos and others living traditional lifestyles.

Toledo's traditional economic industries have been a combination of agriculture and forestry, and to some

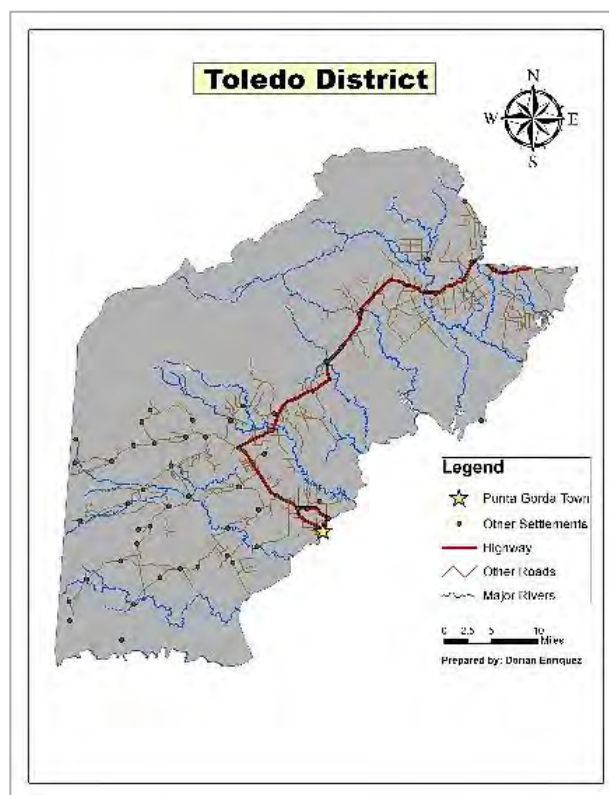


Figure 4 Map courtesy of Dorian Enriquez

¹ Belize Census 2010

extent fishing, especially in coastal areas. Agricultural production varies from rice, beans and corn, to the production of organic Maya Cacao which is exported for the production of gourmet chocolate.

Tourism is a relatively new Industry in Toledo; a product of the wave of environmental consciousness of the 1980's and 90's, where vast amounts of terrestrial and marine resources in the country were designated as reserves for protection of these resources. Toledo's reputation as an ecotourism Mecca grew and with it so did the demand for eco- lodges and other small scale tourism service providers.

Tourism in Toledo:

The Toledo District has a total of forty (40) registered hotels² representing a total of 323 rooms. Most are small enterprises with an average of 8 rooms per property. Average annual occupancy in Toledo is 30%, a figure which is 12% lower than the national average.³

According to the BTB records, Toledo has sixty one (61) registered tour guides. However, research indicates that a large number of guides have either taken on other jobs outside of the industry or work outside of Toledo where there is more demand. The District also has thirteen (13) licenced tour operators, but licensees are registered to hotels and do not provide tour services to other clientele. This is a standard finding for much of the sector country wide, as most resort-hotels are also licenced as Tour Operators.

2015 Belize Hotel Capacity by Key Area				
Key area	Hotels	Rooms	Share	Average rooms
Belize City	32	684	9.3%	21
Belize rural	25	250	3.4%	10
Caye Caulker	107	712	9.6%	7
Cayo	122	1144	15.5%	9
Corozal	33	368	5.0%	11
Offshore islands	43	392	5.3%	9
Orange Walk	23	289	3.9%	13
Placencia	136	781	10.6%	6
San Pedro	166	1833	24.8%	11
Stann Creek	80	604	8.2%	8
Toledo	40	323	4.4%	8
Total	807	7380		9
Source: Tourism Market Study 2015				

Table 1 Belize Hotel Capacity by key area 2015

Punta Gorda Town is accessible by road via the Southern Highway which link Toledo to the rest of the country, by air using any of the two national airlines: Tropic Air or Maya Island Air, or by sea via water taxi from Puerto Barrios or Livingston, Guatemala or Puerto Cortez, Honduras.

Despite varied means of access, port arrivals in Punta Gorda are significantly lower than at other Ports of Entry. Average arrivals at the Punta Gorda Town Port are 7,500 travellers per year, which is a mere 2.6% of the national arrivals figures⁴

² BTB Hotel Registry 2014

³ Tourism Market Study and Identification of Investments for the Sustainable Tourism Program II in Belize – M. Knight 2015

⁴ Tourism Market Study.....Belize – M. Knight 2005

Visitor Analysis:

Demographics:

The *Tourism Market Study 2015* commissioned by the Ministry of Tourism for this project identified Belize's primary tourist generating market as United States followed by Europe (led by the UK) and Canada respectively. Belizeans living abroad and visitors from neighboring countries individually accounted for less than 10% of the total visitation.

Toledo's visitation demographics are similar to the national figures. However on a much smaller scale, similar statistics from the BTB suggest that Toledo receives only 3.3% of the annual tourist arrivals totalling only 10,526 people.



Figure 5 Visitor Arrivals 2015. Source: BTB

Toledo's Tourism Indicators

The STP II Destination analysis identified destination specific indicators for tourism in Toledo. These dashboard indicators included:

- Growth Rate (1.1% increase)
- Arrivals (9,600 – 10,500)
- Water Taxi Arrivals (7,600 – 6,200)
- Average Visitor Spend (\$40 - 1/3 the national level)
- Length of stay (13.1 - days nearly double the national average)
- Hotel Occupancy (30.1% - below the national average)

Results of the VEMS Study and diagnostic revealed some strengths in growth and arrival numbers, however hotel occupancy figures and visitor spend were relatively low suggesting the need for industry diversification and infrastructure development.

Visitors Ratios by Activities Done	
Activity	Ratio
Diving	23.8%
Snorkelling	67.3%
Island tour	25.2%
Caving	32.9%

Supply & Demand:

The 2015 Visitor Exit and Motivation Survey (VEMS) also commissioned by the Ministry of Tourism for this project, identified several major tour activities that tourists carried out while in Belize. These activities (*Listed in the table*) fell under three main categories:

- Marine
- Nature Based
- Cultural

Birding	11.6%
Gaming	1.6%
Other	13.3%
Fishing	22.2%
Sailing	13.1%
Canoe/kayak	21.5%
Jungle trek	34.4%
Culture event	15.3%
None	7.0%
DK/NS	1.5%

Source: BTB Statistical Digest 2013, excerpt from Tourism Market Study 2015

Table 2 Visitor ratios by activities done 2014. Source: BTB

Of all tourism activities listed in the VEMS outside of gaming, all are currently available in Toledo.

These tourism activities listed for Toledo coincide with the National Sustainable Tourism Master plan 2030, which identified the two primary areas for tourism in Toledo as:

- Ecotourism (Tourism based on nature/Adventure/Culture)
- Nautical tourism (Light Marine activities i.e. Snorkelling, fishing etc.)

The 2015 VEMS Study identified Toledo's top tourism activities as shown in the *Table 3*.

Toledo top activities declared	
Discover local history, culture	78%
Lubaantun archaeological site	51%
Discover, participate in art & crafts	45%
Blue Creek (Hokeb Ha) cave	31%
Historical presentations	29%
bird watching	24%
Port Honduras Marine Reserve	18%
Sapodilla Cayes	14%
Note: Activities are not mutually exclusive.	
Source: Exit Survey of May 2015.	

Table 3 Top activities declared

Visitor Satisfaction

The VEMS also reported that on average most visitors surveyed were satisfied with their vacation in Toledo. Most complaints were on beach quality, tourism signage and lack of information and maps (see Fig 5).

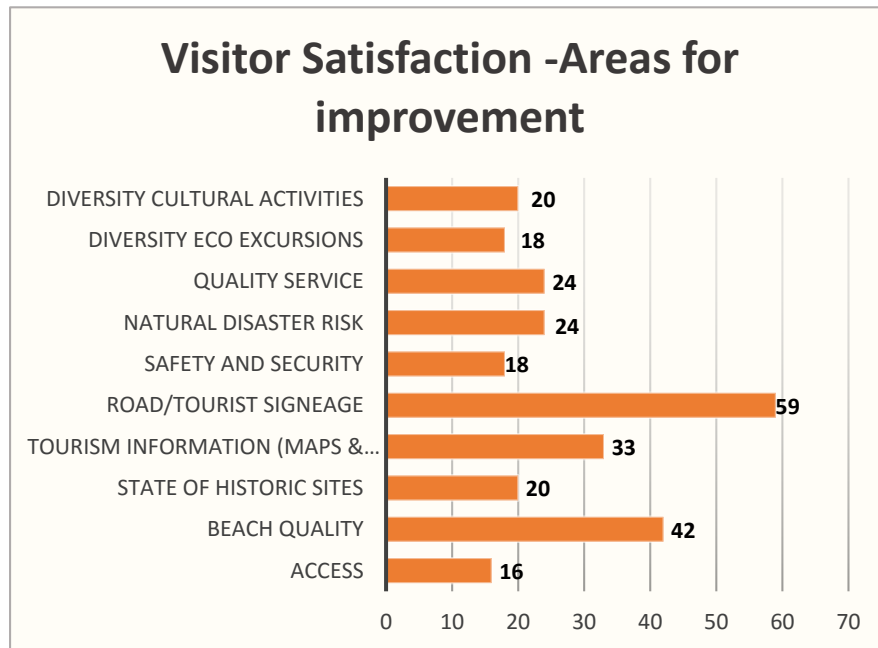


Figure 6 Data taken from the VEMS 2015

Of the visitors captured in the VEMS who had not visited Toledo during their stay in Belize, most indicated that they had little or no knowledge about tourism offerings in Toledo and this was the main reason for not visiting. Of those surveyed, 87% expressed a desire to return to Belize to visit Toledo⁵.

Product Audit:

The aim of the product audit was to identify the following:

1. What can visitors see and do in this area?
2. What are the different attractions that they may visit?
3. What services would they require?
4. What different activities could they do?

A comprehensive product audit was carried out for the entire Toledo District, identifying the attractions marketed as part of Toledo's tourism product, and categorizing them by location and tour type. The tourism map below (*taken from Moon Guides*) shows typical attractions being marketed within the district.

⁵ Toledo Visitor Exit Survey 2015



Figure 7 Toledo Tourism Map. Sourced via Moon Travel Guide

Additional tour data was collected from a combination of sources including: individual business websites, Destination Belize Magazine, BTB website, Toledo Howler and a collection of local flyers and advertisements available from local hotels, restaurants and operators to identify some tourism attractions throughout the district. These attractions were then compiled into five different tour types as listed below:

1. Natural Resource
2. Cultural Resource (living culture)
3. Marine
4. Heritage (historic sites)
5. Special Events

These attractions were also scored using the criteria listed for product readiness in *table 4*:

Tourism facilities	Accommodation, catering, attractions, activities, events, retail
Heritage and Culture	Historical connections, traditions, specific heritage sites, arts, crafts, cuisine and other aspects of living culture.
Landscape and countryside	General qualities, appeal and distinctiveness of the landscape. Specific access sites, routes and trails, wildlife seaside and beach
Built environment	Towns, villages – appearance and upkeep. Specific features, distinctive architecture, parks and gardens, public realm.
Access and transport	Road, boat (river, sea), air links to and within the destination both public and private
Visitor services	Marketing media, information provision and outlets. Signage, parking, toilets and other services. Accessibility of tourism products and services.

Table 4 Criteria for product readiness of attractions

The results were ranked as follows:

1. Emerging
2. Conceptual phase
3. Planning phase
4. Partially ready
5. Operational (Tourism ready)

Audit Results:

	Tourism Attractions	Location	Management Authority	Product readiness
Heritage	DEVELOPED			
	Nim Li Punit	Indian Creek Village	NICH	5
	Lubaantun	San Pedro Columbia Village	NICH	5
	Blue Creek Cave (Hokeb Ha)	Blue Creek Village	NICH	4
	UNDEVELOPED			
	Uxbenka	Santa Cruz Village	NICH	1
	Pusilha	Rural area	NICH	1
	7 Hills Confederate Sugar Mill & The Confederate Cemetery	Forest Home Village	NICH	1
Natural Resource	Rio Blanco National Park/ Falls	Santa Cruz Village	Local Village Authority	3
	San Antonio Falls	San Antonio Village	Local Village Authority	2
	CAVES			
	Yuk Balam Cave	Santa Cruz Village	NICH	1
	Tiger Cave	San Miguel Village	NICH	1
Marine Resource	MARINE ATTRACTIONS			
	Punta Negra	Punta Negra Village	Local Village Authority	3
	Port Honduras Marine Reserve	Caribbean Sea	TIDE/Fisheries	5
	Sapodilla Cayes	Caribbean Sea	TIDE/Fisheries	3
Cultural Resource	CULTURAL ATTRACTIONS			
	Barranco Cultural Tour	Barranco Village	-	2
	Maya Heritage Tour	Serval Villages	BTB	4
	Maya House of Cacao	Mafredi Village	Cacao Growers Association	4

Table 5 Product readiness of tourism attractions.

As exemplified in the product audit the vast majority of the tourism attractions identified are located in rural Toledo. With the exception of three sites (Nim Li Punit, Lubaantun & Blue Creek) most are not yet tourism ready and are in isolated stand-alone locations with few ancillary services.

Historically most infrastructure development in the district has traditionally been focussed in urban centres, leading to cluster development around Punta Gorda Town. The town is the hub for all transportation in the district and centre for government, banking, telecommunications, medical and other service providers in the district.

Tourism development has naturally followed this infrastructure mapping with the majority of accommodations, food and beverage, travel and other service providers located in a similar manner around Punta Gorda Town.

“Any tourism development plan must acknowledge the role that Punta Gorda Town plays as a ‘hub / key town’ for transportation, accommodation, communication and tourism for the entire district.”

Tourism growth and development in Toledo germinates from a properly planned and developed hub. Punta Gorda is the tourism generating market for day trips to the interior, overnight visitors to rural accommodations and the leaves room for the development an expedition based tours to marine destinations and the interior.

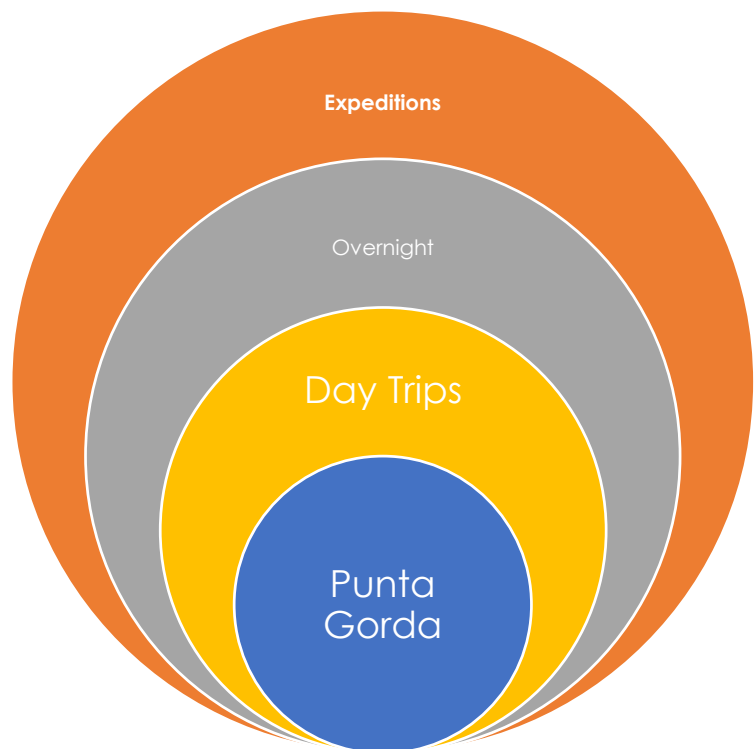


Figure 8 Example of Tourism Generation centred in Punta Gorda

Punta Gorda Product Base:

	URBAN ASSETS	Product	Responsible Agent
Built Environment & Event Based	Transportation Hub	PG Airstrip PG Port Bus Terminal	Municipal Government
	Accommodation	Cluster of Hotels, Restaurants	Private
	Ancillary Services	Tour offices, shops, banks, communication, medical	Private
	Special Event Tourism	Cacao Fest, Fish Fest, Battle of the Drums	Municipal Government/ Private

Table 6 Cluster development, Punta Gorda Town

Summary of Investment Projects:

Since the completion of the National Sustainable Tourism Master Plan in 2012, several projects have been launched to improve various infrastructure areas in Toledo. These projects ultimately, if not purposefully, will have an impact on Toledo's tourism sector that will require updates and re-evaluations to be done to the master plan.

► Cruise Tourism from Harvest Caye	2016
► Site Upgrades to Lubaantun, Nim Li Punit and Blue Creek	2015
► Mayan House of Cacao - Mafredi Village	2015
► New Highway to Guatemala	2015
► New Market in PG	2015
► New Sports Complex	2015
► New Community Centre	2015
► Upgrades to the Port	2012
► Upgrades to Airstrip	2012

Figure 9 NSTMP Upgrades

1. Harvest Caye

The Harvest Caye Cruise Port is a \$100 million dollar investment by Norwegian Cruise Line, to develop a cruise port on the island of Harvest Caye. Although the island is considered to be in the Stann Creek District, it is just north of Monkey River Village and it is expected that day tours will extend to Monkey River, Indian Creek (*Nim Li Punit*) and Big Falls Villages by 2016.

2. Archaeological Park Upgrades

Under a European Union funded project, the Institute of Archaeology recently completed (*July 2015*) a project to improve archaeological parks and adjacent communities (Nim Li Punit, Lubaantun and Blue Creek). The goal of the project was to improve park quality standards, visitor access & safety on these sites as well as provide better opportunities for local communities to benefit from tourism to these parks. These upgrades will allow for better visitor experience and improved carrying capacity at these sites.

3. Mayan House of Cacao

The Mayan House of Cacao is an E.U. funded programme with the Toledo Cacao Growers Association that developed an interpretive centre & chocolate factory in Mafredi Village (*See fig 10*). The centre was completed in 2015 with state of the art chocolate making machinery and interpretive displays on the traditional production of Maya Chocolate. This centre is expected to attract day visitors either visiting other rural attractions or travellers on the Jalacte road.



Figure 10 Maya house of Cacao, Mafredi Village

4. Southern Highway to Guatemala

The Government of Belize is near completion of the portion of the Southern Highway from mile 14 to Jalacte village. The project involves the upgrading of 32.81 km (20.39 miles) of highway between Southern Highway at mile 14 and the road junction near Jalacte, located approximately 1.7km from the Belize – Guatemala border.

This highway will, for the very first time, provide terrestrial access to Toledo from Central America. The final components of the link will be bridge at Jalacte and feeder road to connect Belize's Southern Highway with CA13 Highway in Guatemala.



Figure 11 Photo taken from the Southern Highway Project. Update April 2015

Official projections have not been given for the expected tourist traffic at this new port of entry. However, transportation figures suggest the number to be about 1/3 the number of entries received at the Western Border in Cayo (approximately 9,500 people per year). Toledo's tourism challenge thereafter will be getting these travellers to stay and visit Toledo.

5. Municipal Upgrades

Since the development of the National Sustainable Tourism Master Plan in 2012, several municipal upgrades have been undertaken to improve infrastructure in Punta Gorda Town. These are important components to the tourism product because Punta Gorda serves as the transportation hub for the district and is also the centre of government, banking and communication. Enhancing Punta Gorda's built environment directly improves visitor experiences.

Municipal upgrades:

Completed	Under Way	Planned
Punta Gorda Port	Punta Gorda Sports Complex	Town Boardwalk
Punta Gorda Airstrip	Punta Gorda Market	Improve Drainage
	Punta Gorda Community Centre	Seawall Construction
		Sewage System
		Alternate Town evacuation route

Table 7 Municipal upgrades undertaken to improve infrastructure.

Competitive Markets:

Belize sits on the North Eastern coast of Central America but with historic ties and an identity closer to the Caribbean, Belize acts as a geographic bridge between the two sub continents and a melting pot of the varying cultures.

Theoretically, this means that components of Belize's tourism product base are shared in both regions developing competitive product markets. Belize's continued success will depend on effective marketing and product promotion in niche markets. This was best shown between 2010 and 2014 when Belize experienced a growth rate of about 7.4% in



Figure 12 Map of Central America. Source: Google

overnight arrivals. The world average at the time was 4.8% and Central America experienced 5% and the Caribbean a mere 3.6%.

The 2015 Destination Analysis Diagnostic identified Toledo's development potential market as a "Ridge to Reef" product. This is similar to combination packages offered primarily from inland and coastal destinations such as Cayo and Placencia. Toledo's ridge to reef product has strong potential for development as both are available with limited travel. However, the product requires further development of ancillary services to compete in the market.

The 2015 Market Study identified Toledo's competitive tourism markets in Costa Rica, Guatemala, Mexico and Honduras all offering similar ecotourism packages. There are few destinations rivalling the cultural complexity of Toledo combined with the strong eco-tourism base. The closest competitive markets offering a range of similar cultural experiences identified were Livingston, Guatemala and the Bay Islands in Honduras. Both offering Garifuna Culture as a component of the tourism product and Livingston offering visits to Maya Communities on the Rio Dulce.



Figure 13 Livingston, Guatemala. Images taken from www.travelexperta.com

Climate Change Resilience

Climate is an essential resource for the tourism industry as it holds the potential to influence tourism trends. Changes in climate and weather patterns at tourist destinations are increasingly affecting tourists' travel decisions, as well as impacting tourism businesses and related sectors such as agriculture and infrastructure. The impacts of climate change on tourism is a global issue, hence the Caribbean is not exempted from its direct or indirect impressions.

The impacts of climate change on tourism destinations, their competitiveness and sustainability can be categorized into four segments as follows:

1. Direct climate impacts: this includes geographic and seasonal redistribution of climate resources for tourism and changes in operating costs; such as heating and cooling days, food and water supply and insurance costs.
2. Indirect environmental change impacts: environmental changes induced by climate such as biodiversity loss, decline in landscape aesthetics, altered agricultural production, water availability, damage to infrastructure and increase in vector borne diseases.

3. Impacts of mitigation policies on tourist mobility: changes in tourist flow as a result of increased costs, alterations to aviation routes as it relates to changes in the proportions of short-haul and long-haul flights.
4. Indirect societal change impacts: this includes the consequences of climate change on societies such as economic growth, development patterns and social-political stability. (Climate Change and Tourism)

⁶Based on Figure 14 below, which highlights major climate change impacts affecting tourism destinations by geographic distribution, Belize as a part of the Caribbean region is susceptible to the following:

- Warmer summers
- Increase in extreme events
- Water scarcity
- Marine biodiversity loss
- Sea level rise
- Increase in disease outbreaks
- Political destabilization
- Travel cost increase from mitigation policy

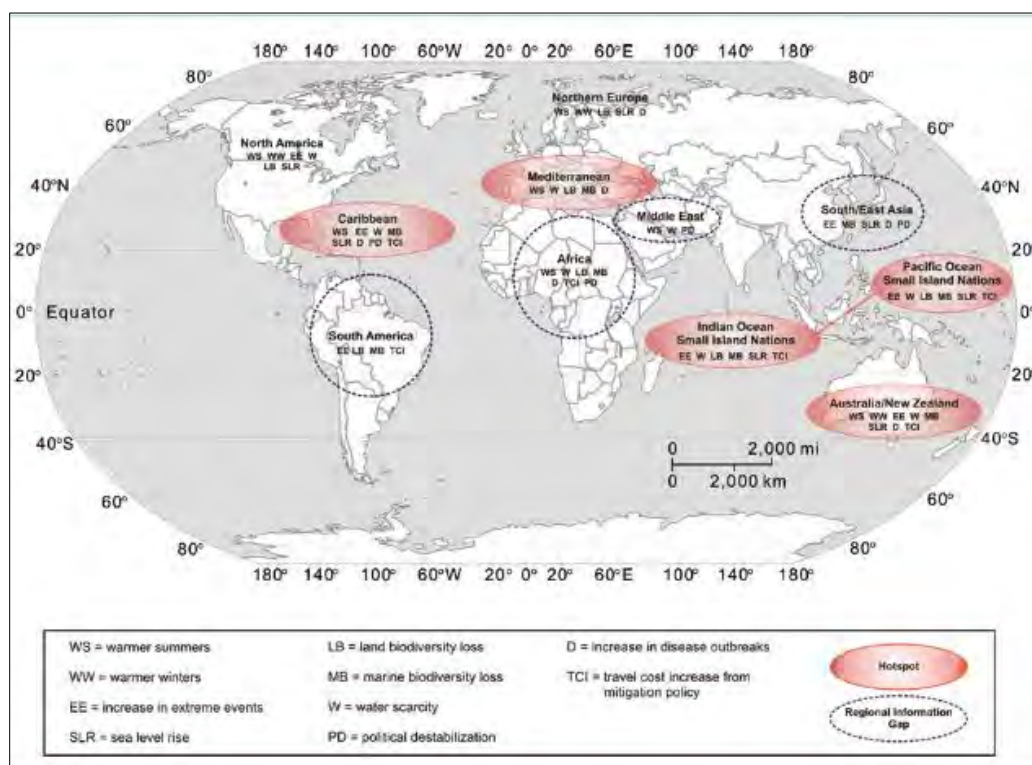


Figure 14 Geographic distribution of major climate change impacts affecting tourism destinations. Source: WTO

⁶ Climate Change and Tourism – Responding to Global Challenges. 2009

All major climate change impacts have a corresponding implication specific to tourism destinations, independent of their locations. Such implications are detailed in table 7.

Impact	Implications for tourism
Warmer temperatures	Altered seasonality, heat stress for tourists, cooling costs, changes in plant-wildlife-insect populations and distribution, infectious disease ranges
Increasing frequency and intensity of extreme storms	Risk for tourism facilities, increased insurance costs/loss of insurability, business interruption costs
Reduced precipitation and increased evaporation in some regions	Water shortages, competition over water between tourism and other sectors, desertification, increased wildfires threatening infrastructure and affecting demand
Increased frequency of heavy precipitation in some regions	Flooding damage to historic architectural and cultural assets, damage to tourism infrastructure, altered seasonality
Sea level rise	Coastal erosion, loss of beach area, higher cost to protect and maintain waterfronts
Sea surface temperature rise	Increased coral bleaching and marine resource and aesthetics degradation in dive and snorkel destinations
Changes in terrestrial and marine biodiversity	Loss of natural attractions and species from destinations, higher risk of disease in tropical-subtropical countries
More frequent and larger forest fires	Loss of natural attractions; increase in flooding risk; damage to tourism infrastructure
Soil changes (e.g. moisture levels, erosion and acidity)	Loss of archaeological assets and other natural resources, with impacts on destination attractions.

Table 8 Major climate change impacts and implications for tourism destinations.

As an economic sector, tourism can be influenced by local environment, climate and climate-influenced natural resources. Research indicates that consumers in key tourism markets are increasingly focusing on climate change. In some markets, perceptions of the contribution of tourism to climate change (i.e. air travel) have the potential to affect the destination choices of tourists. Tourists may also make decisions based on personal well-being such as their thermal comfort and length of stay due to length of rain showers, which can be analysed based on average temperatures and precipitation.

Consumer demand may be affected by the response of the tourism industry and governments to climate change issues, hence the need to monitor changes in consumer perceptions and purchasing behaviour in order to provide consumers in the tourism market with positive responses to climate change issues. This requires the assessment of climate change impacts on destinations to date and mitigation policies and measures to address past, present and future effects.

The Toledo District is one of Belize's last pristine landscapes. Its uniqueness stems from the lack of large scale development and a relatively low population density of approximately six persons per square mile. The largest environmental/climate change impact on the district was caused by hurricane Iris in 2001, which devastated most of the district. Since then, most development has had a moderately low impact on the environment. Punta Gorda town is approximately 10 feet above sea level and does not suffer from tidal flooding. However, the town is experiencing coastline erosion and the community has had

some rainfall based flooding in residential areas due to lack of, or poor drainage.⁷ The Punta Gorda Municipal Development Strategy proposes to address this issues by the development a drainage plan and infrastructure for the Town as well as the construction of a sea wall to combat beach erosion.

Most inland rural communities have very little drainage infrastructure and are subject to the swelling of riverbanks after intense rainfall. Most communities however, have made necessary adjustments to reside outside of the flood plains and the most common effect is usually on agro-production on which the district is highly dependent.

Agricultural production is projected to decrease at even small temperature increases in developing nations such as Belize. This change in climate is expected to affect food production, which subsequently creates issues for the tourism sector such as risks of nutritional deficits, gastro-intestinal infections and psychological stress which tourists may be susceptible to.



Figure 15 Damage caused by Hurricane Iris, 2001

The National Adaptation Strategy to address climate change in the water sector in Belize has presented five key adaptation actions which include the establishment of an agency to execute integrated water resources management; strengthening the existing institutional and human resources capacities in the water sector for improved management practice, formalizing the legal mandate and operations of the National Climate Change Committee, strengthening the trans-boundary relationships to cover the impacts of climate change on the water sector and increasing public awareness and education in water culture and climate change⁸.

As a tourism destination, it is in the best interest of the Toledo district to use these five key actions to address climate change impacts within the district. As a natural and cultural heritage destination, risk assessment and preparedness strategies must be set in place for the district, as well as scientific monitoring survey programmes to assess changes, reconstruction and stabilization of historic assets, product diversification, education and awareness programmes, and strategy to reduce and remove external stresses.

⁷ Punta Gorda Municipal Development Plan 2014

⁸ National Adaptation Strategy to address climate change in the water sector in Belize, Strategy and Action Plan 2009

Punta Gorda Flood Risk Analysis

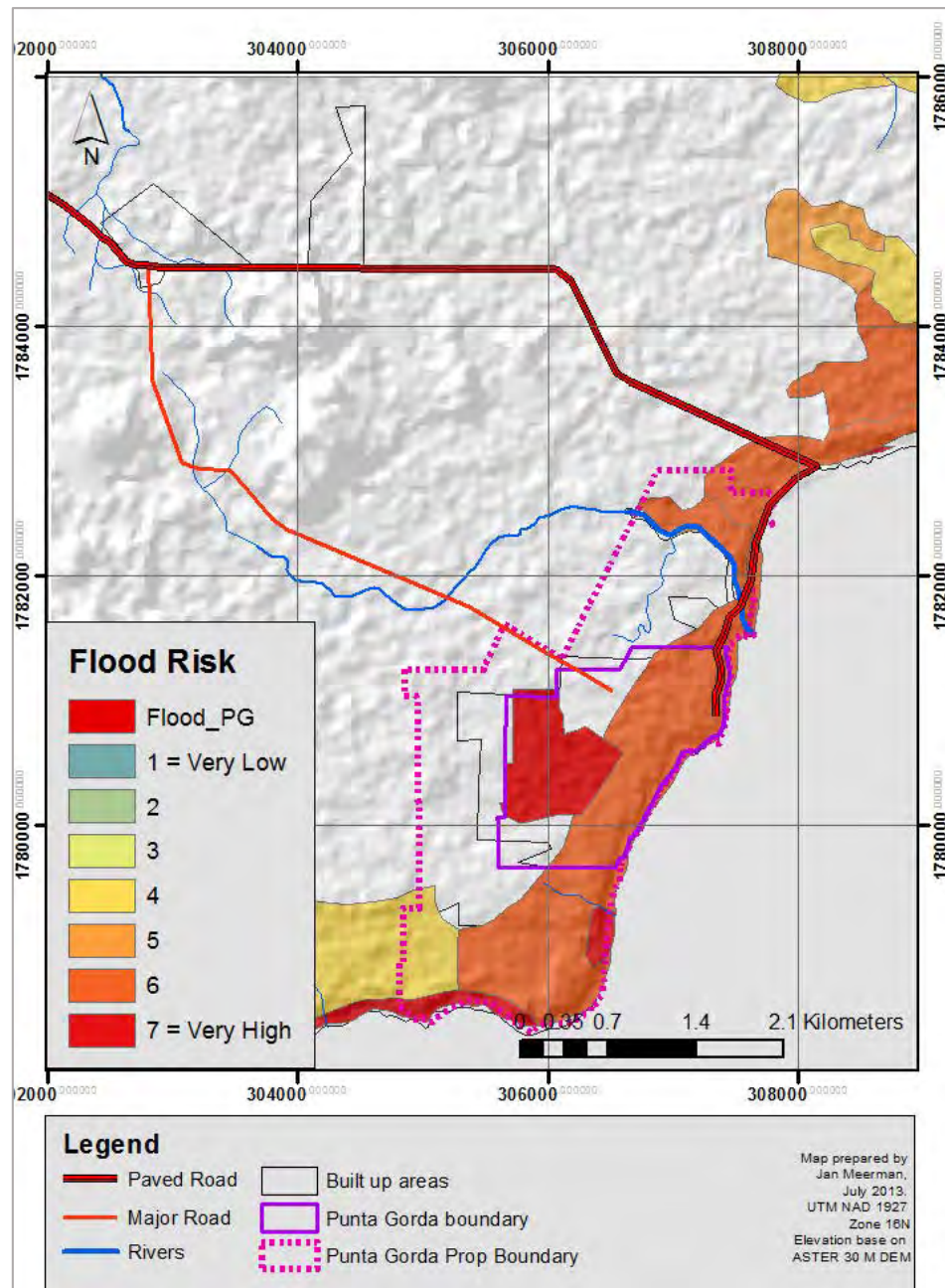


Figure 16 Punta Gorda Municipal Development Plan

Toledo Tourism Development Strategy:

This component looks at destination development plans based on the analysis of prior planning initiatives, current development works, consumer trends and analysing gaps in the industry. There have been several documents developed to guide the development of tourism in Toledo including the following: The Toledo District Marketing Plan, Tourism Development Strategy for Coastal Areas in Southern Belize, The Toledo Responsible Tourism Policy, Punta Gorda Municipal Development Plan and The National Sustainable Tourism Master Plan which are just a few of the more recent plans.

Under the National Sustainable Tourism master Plan the Ministry of Tourism has commissioned five studies to strengthen the implementation of the Plan:

- a. A review of legal and policy framework
- b. Institutional Assessment
- c. Ecosystem Mapping exercise
- d. Market Study
- e. Visitor Exit & Motivation Survey

The findings of which have all been incorporated into the Toledo Destination development Plan.



Figure 17 Traditional chocolate manufacturing.

All studies confirm that the cornerstone for Toledo's Tourism sector lies on its diverse cultures and abundant natural resources. Results of the Visitor Expectation and Motivation Survey 2015 (VEMS) indicate that the majority of visitors participated in either a cultural or nature based activity.

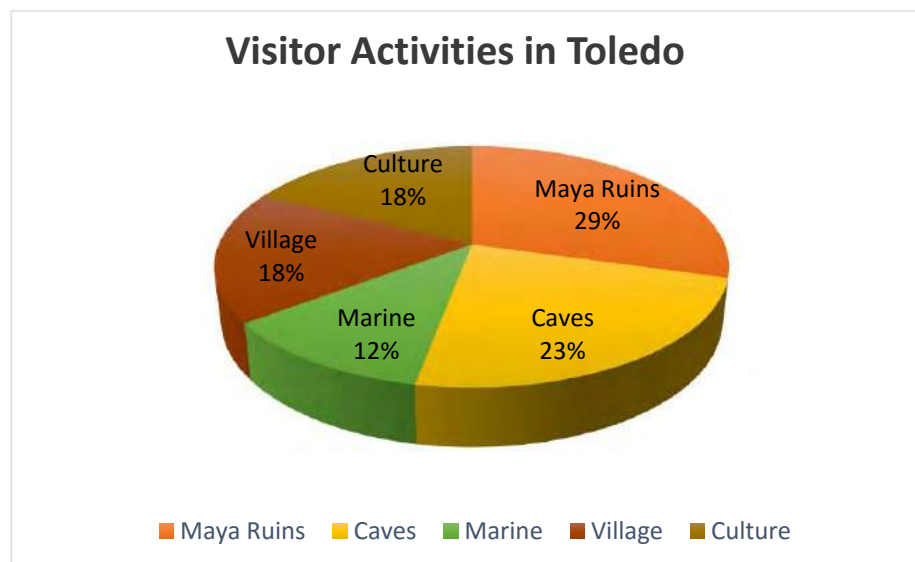


Figure 18 VEMS Study on tour activity

Coastal Tourism Strategy:

The “Tourism Development Strategy for Coastal areas in Southern Belize 2013” focused on developing three coastal communities in the Toledo District: Monkey River Village, Punta Negra Community and Punta Gorda Town. The Strategy promoted the development of small scale enterprise development such as restaurants and community tours in the villages, identifying the dependence of tourism generating from Punta Gorda to sustain tourism in the communities.

The Strategy also identified six areas of need for tourism development in Punta Gorda Town:

1. Heritage Tour (build identity) -“10 things to see or do in Punta Gorda”

Although Punta Gorda Town is the travel and tourism hub for the district, the majority of tourism activities exist outside of the town. The plan suggests developing more “in town” activities for visitors to do. This will help with the attractiveness of Punta Gorda as a destination and result in more stay over travellers who currently travel in transit from the port and airstrip to other destinations.

2. Expand on existing events: *Cacao Fest, Fish Fest and Battle of the Drums*

Punta Gorda currently hosts three annual events of high accolade. For the duration of these three events most hotels are fully booked, suggesting that with careful planning and event coordination Punta Gorda is an excellent special event destination.

3. Improve Infrastructure (Coastal Areas, Parks, Markets, Bridges etc.)

Toledo is often referred to as the “forgotten district” primarily due to a lack of investment and public infrastructure. The recent Municipal Development Plan will upgrade some of this infrastructure, however a lot more development is needed to parallel infrastructure development in other districts.

4. Tourism signage

In both the municipality and the district there is a need for better tourism signage. Aside from the welcome sign which has become an icon for the town, there is very few marketing or directional aids for visitors to Punta Gorda.

5. Improve media & marketing initiatives: (Include social media)

Toledo’s online marketing presence is very low, appearing mainly on review sites like trip adviser and lonely planet. There are only two marketing websites dedicated to Toledo www.southernbelize.com and www.PGBelize.com, which are both outdated.

6. Development of a Town and Countryside mapping

Toledo’s built environment consists mainly of residential flats and few commercial buildings. Downtown Punta Gorda has remnants of few colonial buildings and scattered pieces of iconography such as the welcome sign and town clock, but very little else. The Countryside is strewn with Maya Villages with a mixture of thatch and more recently concrete dwellings.

Perhaps the only rural landmarks are the Maya ruins at Lubaantun where the famous Crystal Skull was discovered.

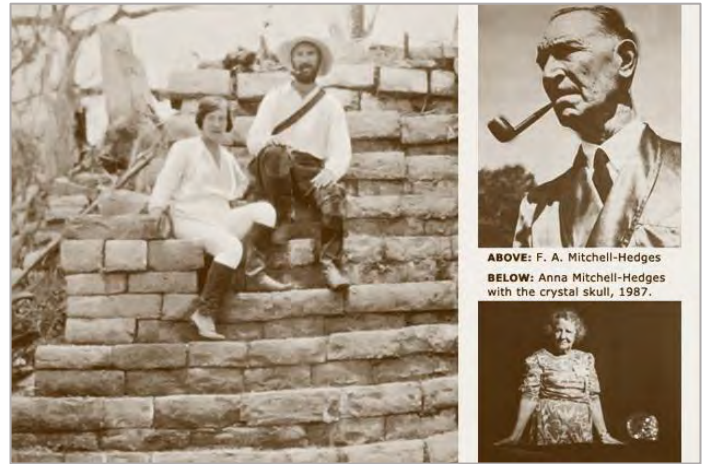


Figure 19 Lubaantun present day and Story of the Crystal Skull taken from www.ambergristoday.com

Municipal Development Goals for Punta Gorda:

► Economic Development

- Promote the Town's competitive advantage as a Gateway to Guatemala & Honduras

► Tourism Development

- Press for the protection of the area's natural attractions

► Urban Development & Design

- Create a Town centre pedestrian zone
- Boardwalk
- Night Market

► Preservation of Historic Buildings

- Establish a House of Culture



Figure 20 Punta Gorda Town Clock – Central Park

Gap Analysis

Priority Areas	Areas to Enhance Tourism	Challenges
<ul style="list-style-type: none"> ✓ PG Marina to service boats from Rio Dulce and Placencia, and open up a new flow of business and traffic to Punta Gorda ✓ Improve roads to sites ✓ Site infrastructure (restrooms, parking signage, concessions) to accommodate larger numbers of visitors ✓ Visitor's centre/information centre with information about Punta Gorda and the district. ✓ Transportation link from Port/Airstrip to Tour Operators ✓ Training centre or hospitality school to provide proper training for personnel in the tourism industry to ensure consistence and quality 	<ul style="list-style-type: none"> ✓ Signage/tourism information about attractions and activities ✓ Improve customer service, especially at ports of entry and transportation sector ✓ Quality control and standards for guest attractions 	<ul style="list-style-type: none"> ✓ Funding ✓ Tourism based inflation i.e. driving costs beyond local affordability (<i>"like Placencia"</i>) ✓ Fear that improving facilities without private investment will increase in transit travellers and not overnight visitors. ✓ Increase in tourism will place greater strain on the already limited social services

Table 9 GAP Analysis findings

Strategic Framework

Based on the findings of the GAP Analysis several areas for improvement in product development for Toledo were identified. These findings were categorized into the following areas and integrated into the plan.

1. **Tourism facilities** (Accommodations, catering, attractions, activities, events and retail)

2. **Heritage and Culture** (Product diversification with an emphasis on niche cultural and nature based tourism activities and special events.
3. **Landscape Development** (General qualities, appeal and distinctiveness of the landscape. Specific access sites, routes and trails, wildlife seaside and beach)
4. **Built environment** (Towns, villages – appearance and upkeep. Specific features, distinctive architecture, parks and gardens, public realm)
5. **Transportation and Signage** (
6. **Capacity Building/Training** (Activities that improve quality and standards of tourism products and services, including environmental quality)
7. **Marketing** (Effective destination marketing which includes destination branding, visitor information, networking and increased capacity building for product packaging and marketing)

Tourism Development Structure:

Punta Gorda:

The NTSMP identified Punta Gorda Town as “the Anchor” for Toledo’s Tourism Product. Infrastructure Development in the Toledo District has traditionally focused on developing the urban community of Punta Gorda Town as the hub for transportation and centre for government services, banking, telecommunications, medical and other services in the district.

Tourism growth, dependent on transportation, has traditionally followed infrastructure development mapping the largest cluster of accommodations, restaurants, tour offices and other services in and around the town.

All tourism development plans must acknowledge the role that Punta Gorda Town plays as a ‘hub / key town’ for the district’s transportation and tourism sectors.

All successful tourism growth in Toledo evolves from a properly planned and marketed hub. Punta Gorda is currently the tourism generating market for most day trips to the interior, marine activities and overnight visitors to rural accommodations. New infrastructure and tourism expansion is gradually leading to the emergence of expedition based tourism where visitors seek adventures greater than day tours.

Rural Toledo:

Toledo’s anchor development strategy for Punta Gorda is tightly correlated to its rural product. Ninety five percent of all tour activities for the district take place in rural attractions *See Table 12*. One of the main issues to rural attraction development in Toledo has been the lack of access and infrastructure. Tourism development has traditionally followed capital infrastructure development focusing on roads, bridges, electricity and potable water. This has resulted in slow development of Toledo’s rural areas.

New development projects such as the Jalacte road, rural electrification, expansion of water systems, cruise and agro tourism, have placed greater demand for development of Toledo's rural assets. Due to the vast expanse of the Toledo district, rural attractions and assets have been clustered into zones for development.

Tourism Zones and Cluster Development

The National Sustainable Tourism Master Plan is a tourism product driven plan, phased by a combination of product and priority. It divides the country into seven geographic areas of which Toledo classifies as southern Belize. The product branding under southern Belize outlined development in the areas of Culture, Nature Based, Sun and Beach and Nautical Tourism.

In order to better outline development areas for Toledo, the district has been zoned into four development areas shown on the map below (*See Figure 21*):

Zone 1: Municipal Development Area Punta Gorda

Zone 2: Rural Toledo - North

Zone 3: Rural Toledo - Jalacte Corridor

Zone 4: Coastal and Marine



Figure 21 Toledo Zone Development

Legend: Zone development for Toledo

- Zone 1: Municipal Area
- Zone 2: Northern Toledo
- Zone 3: Jalacte Corridor
- Zone 4: Coastal and Marine

Priorities for Destination Development:

Zone 1:

Municipal Development Area Punta Gorda – Punta Gorda as the tourism hub is the first impression that most visitors get of the district. The town has no tourism centre, recreation areas, cultural centre, tourism signage or activities to attract or entertain tourists in town. Development of a Welcome Centre, downtown area, culture centre, town tour, better signage and recreation points would greatly enhance visitor experience in Punta Gorda.

Zone 2 and 3 (Rural Toledo – North and The Jalacte Corridor):

Rural attraction development - Both Rural zones; The Jalacate corridor and Northern Toledo are comprised of rural villages and scattered tourist attractions. The villages lack signage, and identification of tourism attractions. The few developed attractions require better infrastructure (*parking, restrooms, trails, upkeep as well as safety and security infrastructure*) for proper tourism

Improved communication & Access –

Many rural attractions have poor access and poor communication services. These are two limiting factors for the growth and development of tourism in these areas. *The Big Falls adventure tour, visiting the villages of Silver Creek, San Miguel, San Pedro Columbia and Dump is often plagued by poor communication resulting in many attractions on the way not being open to receive visitors.*

Zone 4: Coastal and marine: - Toledo's coastal infrastructure is limited only to the Town Port facility built at the main pier to house customs and immigration offices for vessels coming from Guatemala and Honduras. Great opportunities exist for developing a seaside recreation area in town, as well as a marina for tour sport boats.

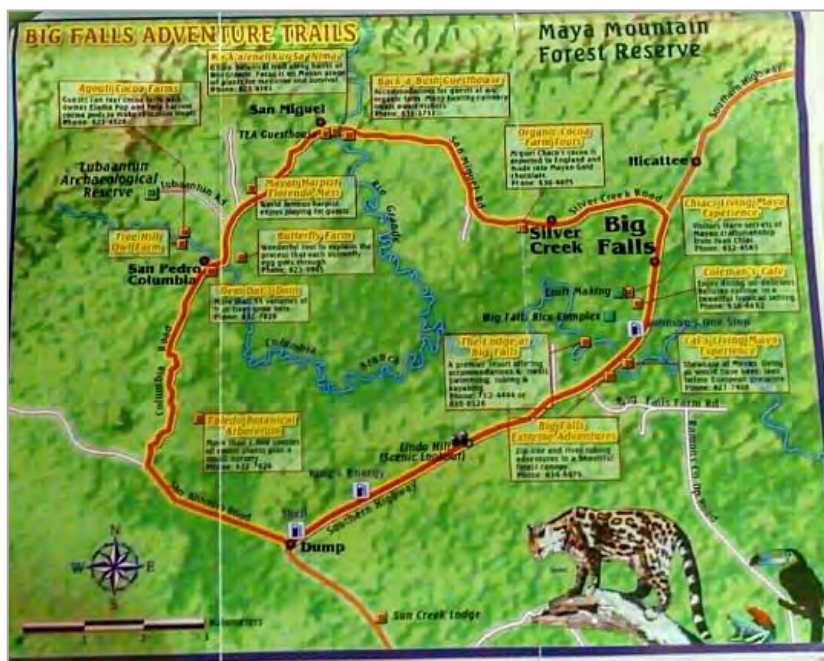


Figure 22 Big Falls Adventure Tour Map

District Wide Development:

District wide, Toledo had three recurring areas for improvement:

1. Capacity Building & Training
2. Signage
3. Product Packaging and Marketing

Tourism Development Plan:

Strategic areas for development:

Zone 1: Municipal Development Area – Punta Gorda

1. Downtown Strip

- a. Downtown Landscape
- b. Welcome Centre
- c. House of Culture
- d. Heritage Tour

2. Waterfront Strategy

- a. Seaside Promenade
- b. Punta Gorda marina

Zone 2 and 3: Rural Toledo – North and The Jalacte Corridor

1. Infrastructural improvements

- a. Improved connectivity and accessibility to site
- b. Improve signage
- c. Improve destination infrastructure

2. Capacity building and local engagement

- a. Improve quality and standards of products and services
- b. Increase local engagement in tourism development
- c. Promote cultural products as brand identity
- d. Diversify tourism product

3. Destination Marketing and product placement

- a. Further develop brand identity and branding
- b. Improve product packaging and marketing
- c. Provide better visitor information

Zone 4: Coastal and Marine

1. Nautical tourism development

- a. Punta Gorda Marina
- b. Punta Negra infrastructure development
- c. Barranco Village cultural tour development

Priority Investment Plan:

Proposal	Product Theme	Agent Responsible	Implementation Activities	Challenges to implementation	Estimated cost
1. Downtown Strip	Tourism Service/ Built Environment	Town Board/ MOTCCA/BTB	<ul style="list-style-type: none"> Designate and develop planned area Tourism directional Signage Develop & Manage concession services Manage Public transportation (Taxi's, buses etc.) 	<ul style="list-style-type: none"> Land Acquisition Collaboration from private land owners to upgrade current buildings in the area. Local use of the area does not coincide with the plan 	\$1,600,000.00
Toledo House of Culture	Cultural Development	NICH/Punta Gorda Town Board/National Garifuna Council & Other cultural organizations	<ul style="list-style-type: none"> Identify a location Develop cultural products to represent the cultures of Toledo 	<ul style="list-style-type: none"> Multiple cultures to represent Financial programming from NICH 	\$200,000
Toledo Welcome centre	Tourism Service	Town Board/ BTIA/BTB/Tour Guide Assn	<ul style="list-style-type: none"> Identify a location Provide shared information space for the municipality, tour operators, hotels, events, transportation providers etc. for the district. 	<ul style="list-style-type: none"> Requires creation of a link in the downtown area Risk of duplicating efforts of the local BTIA office 	\$175,000
Heritage Tour	Cultural Development	NICH/ PGTB/BTB/BTIA	<ul style="list-style-type: none"> Identify a 10 point Heritage tour of Punta Gorda and surrounds Possible points for development: 7 hills sugar mill, confederate cemetery, Drumming centre and other attractions that might not be a full day's activities. Living experience packages etc. 	<ul style="list-style-type: none"> A lot of the heritage sites are located outside of Punta Gorda Quality standards need to be developed 	\$30,000
2. Waterfront Development strategy	Built Environment/ Environmental Protection	PGTB/BTIA/BTB	<ul style="list-style-type: none"> Development of a sea side promenade for recreation. Improvement of sea wall to include seawall side walk with rest and picnic areas Development of food vending and souvenir stalls along the promenade Upgrade of the pier to provide marina services to boaters. 	<ul style="list-style-type: none"> Some land reclamation may be necessary along the seaside A seawall will need to be created to mitigate effects of climate change Pier is currently used by the local fishing Coop. Multiple users may create future problems. 	\$2,940,000.00

Table 10 Priority investment

Punta Gorda Downtown Strip

The “Punta Gorda downtown Strip” will develop an urban landscape, linking the Front and Main streets, providing a comfortable pedestrian link for tourists arriving either by bus or by sea to downtown Punta Gorda.

The strip will encompass the development of a hospitality zone to enhance the downtown landscape of Punta Gorda.

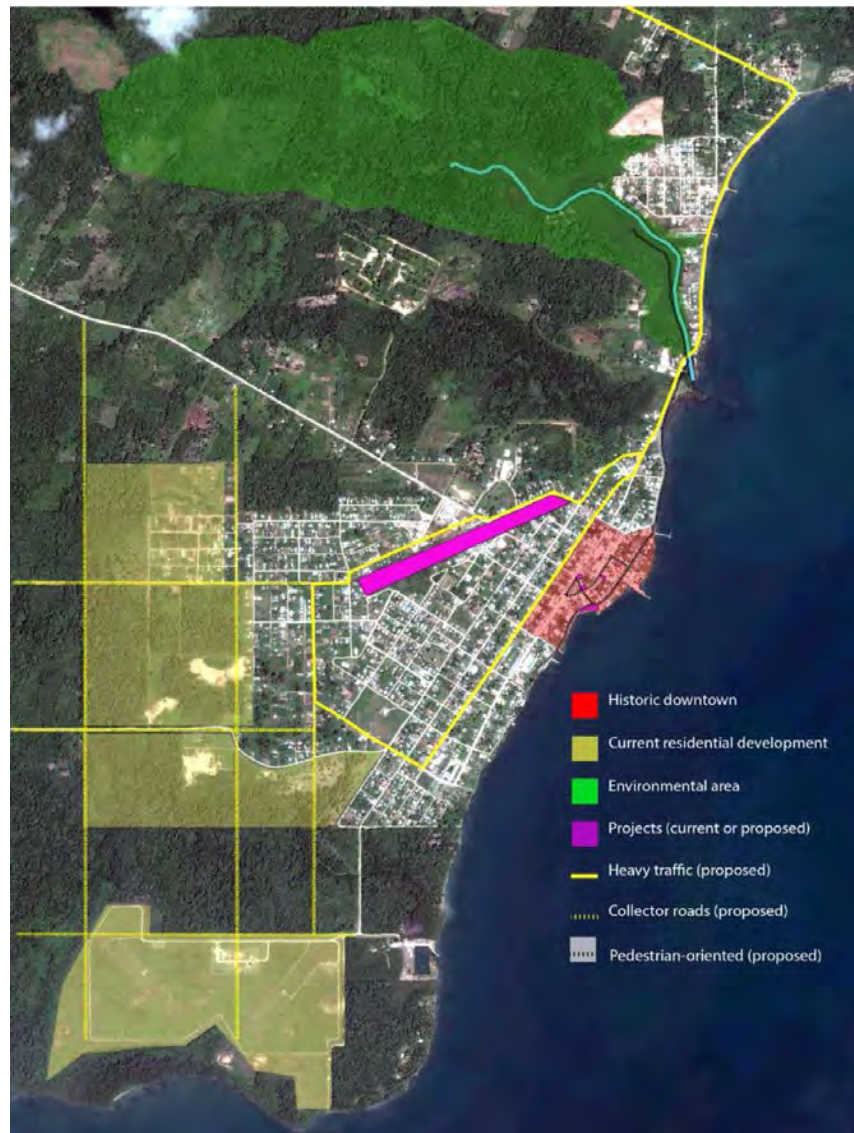


Figure 23 Punta Gorda Development map taken from the Municipal Development Plan

Location:

The area to be developed stretches from the corner of Front Street and King Street, to the corner of Prince Street and the area located to the south and west of the court house for the development of the Toledo house of culture and Welcome Centre. (See figure 24)



Figure 24 Proposed area for Downtown Strip

The Downtown Strip will include assets such as the Punta Gorda Police Station, Court house, Punta Gorda Town Port, the Current BTIA Office and Punta Gorda Seaside Market. It will also take in the old rice processing building on Front Street to provide better access.



Figure 25 Old rice processing building – Main Street

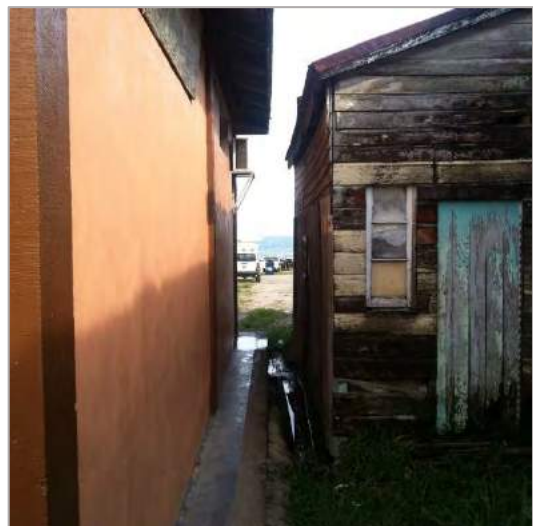


Figure 26 Existing link between Main Street and Front Street



Figure 27 Punta Gorda Port



Figure 28 South-West Corner of the Courthouse



Figure 30 BTIA Toledo Offices



Figure 29 Front Street looking towards the market

The area currently consists of several restaurants, tour operators and vendors to be integrated into retail concessions within the hospitality zone. These services along with the addition of a taxi bay, bathroom facilities, heritage tour, welcome centre and house of culture will complete the Downtown strip.



Figure 31 Seaside market – Under renovation



Figure 32 Current location of local restaurant

The conceptual and spatial layout should represent Toledo's cultural Uniqueness while providing visitors with a safe and attractive environment: The conceptual photographs below have been added to provide context.



Figure 34 Mayan themed open space concept from the Dominican Republic (Google)



Figure 33 Open area Welcome Centre in Costa Rica (Google)

Small Business Opportunities:

Development area	Investment Sector	Possible Agents	Estimated Cost	Priority
Toledo Welcome Centre	Private/Public	BTIA/BTB	\$150,000	High
House of Culture	Private/Public	NICH/Respective Cultural Groups and Councils	\$200,000	Moderate
Food and Beverage Concessions	Private	Local Businesses	\$50,000 each	High
Retail Concessions	Private	Local Business	\$20,000 each	Moderate
Parking Facility	Public	Town Board	\$70,000	Low
Signage	Public	BTB/Town Board	\$70,000	High

Table 11 Downtown Strip Small Business Opportunities

Punta Gorda Waterfront Development Strategy:

The Punta Gorda Waterfront Strategy is a physical extension of the Downtown Strip intended to enhance visitors' experiences in Punta Gorda Town. The strategy involves the construction of a sea wall/sidewalk with proper landscaping, open areas to sit and rest, night lighting for safety, several concession booths for small enterprise vending, several jetties to provide access for swimming, a marina pier, and fish and tackle shop for purchasing or renting marine supplies.



Figure 35 Map showing Waterfront Development Plan

The Promenade:

The Punta Gorda promenade includes the development of a multipurpose seawall, with and incorporated side walk to allow access to walk, run etc., along the sea side. The promenade will be equipped with night lighting, picnic areas, planters, shaded pergolas and small enterprise retail, such as food carts, souvenirs etc. The promenade ends at the current pier which will be upgraded to serve as a marina for small boats.



Figure 37 Proposed area for Downtown Promenade



Figure 36 View of propose area for Downtown Promenade

Punta Gorda Marina:

The Punta Gorda Marina will be situated at the location of the current pier. The facility will be upgraded to house a larger Pier, a fish and tackle store, public restrooms, as well as other services for passenger boats. Docking facilities need to be upgraded to accommodate at least 24 boats and house a ramp for launching and extracting boats from the water.



Figure 38 Current structure of Punta Gorda Pier

Small Business Opportunities:

Development area	Investment Sector	Possible Agents	Estimated Cost	Priority
Seawall	Public	Town Board	\$846,000	High
Upgrade road	Public	Town Board	\$670,000	High
Food Carts Concessions	Private	Local Businesses	\$5,000 each	Low
Retail Concessions	Private	Local Business	\$10,000 each	Moderate
Marina	Public	Town Board	1,600,000	High
Marina Retail	Private	Local Business	\$70,000	Moderate

Table 12 Waterfront Development Strategy Small Business Opportunities

Tourism Development Plan - Toledo Rural

Because Toledo's tourism base is eco-tourism and operates as a hub and spokes design, it is essential that the rural tourism product enhance visitors' experience by its authenticity and environmental awareness. This however must not go at the loss of visitor satisfaction and comfort. The destination development plan identifies the rural component as essential for tourism development particularly in the areas of infrastructure development and capacity building.

Tourism development patterns for attractions in rural Toledo have traditionally followed access way development and road infrastructure. Park visitation numbers to Archaeological Reserves suggest that tour preferences lean more to those sites with paved road access. *(See Visitor Use figures for 2014)*

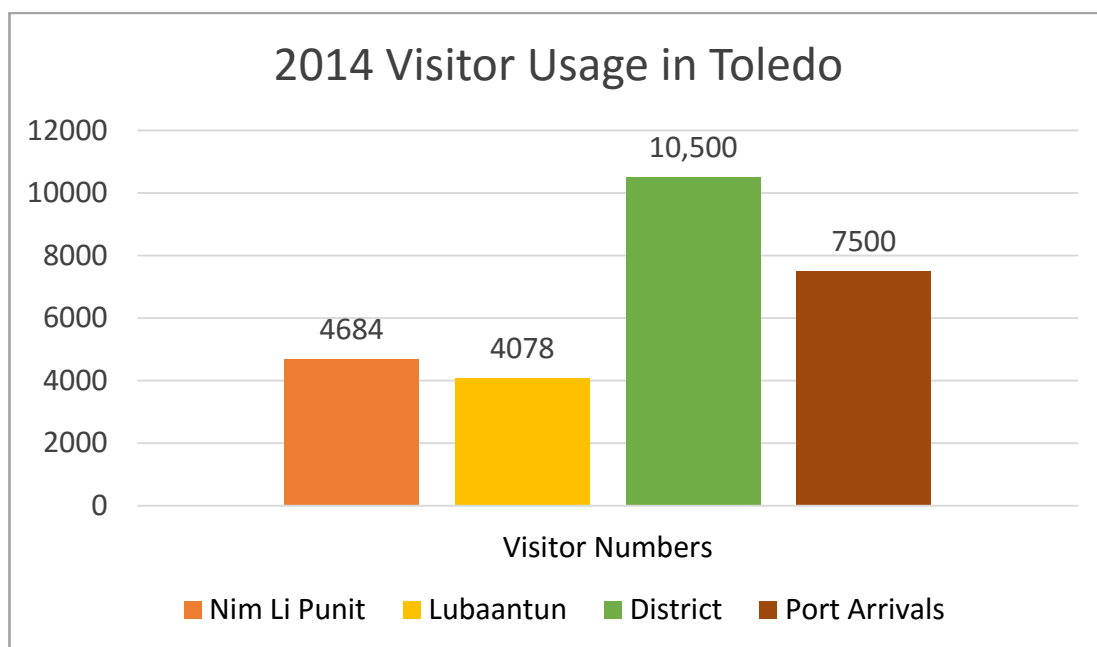


Figure 39 Visitor usage in Toledo for 2014

Data currently does not exist for marine use areas but arrival figures suggest that marine infrastructure directly correlates to visitor use.

Tourism Development outside of Punta Gorda Town is primarily isolated to individual attractions that exist as standalone components of the tourism product. Very little has been done to cluster these tourism attractions into a holistic package for tourism sales. Subsequently, visitor numbers are low and infrastructure development at these sites is relatively poor.

A product list of rural tourism attractions taken from the Product Audit is listed below:

Tourism Attractions	Location	Management
DEVELOPED		
Nim Li Punit	Indian Creek	NICH
Lubaantun	San Pedro Columbia	NICH
Blue Creek Cave (Hokeb Ha)	Blue Creek Village	NICH
UNDEVELOPED		
Uxbenka	Santa Cruz Village	NICH
Pusilha	Rural	NICH
7 Hills Confederate Sugar Mill & The Confederate Cemetery	Forest Home Village	NICH
Rio Blanco National Park/ Falls	Santa Cruz	Local Village Authority
San Antonio Falls	San Antonio Village	Local Village Authority
MARINE ATTRACTIONS		
Punta Negra	Punta Negra Village	Local Village Authority/TIDE/Tour Guide Assn
Port Honduras Marine Reserve	Port Honduras	TIDE
Sapodilla Cayes	Infrastructure/facilities/ Management	TIDE
CULTURAL ATTRACTIONS		
Barranco Cultural Tour	Barranco Village	VC/BEST project/TG Assn
Maya Heritage Tour	Serval Villages	BTB
CAVES	CAVE USE POLICY/GUIDE/TRAINIG	NICH
Yuk Balam Cave	Santa Cruz	NICH
Tiger Cave	San Miguel	NICH

Table 13 Product list of Rural Tourism Attractions

As shown above only 20% of the attractions identified are developed for tourism usage. The remainder requires infrastructure, cluster development, packaging and promotion to support tourism growth. To this end, this plan supports the planning of the tourism development zones in figure 21.

Rural Development Zones:

Northern Toledo

The Northern Toledo area extends from mile 14 (Dump Area) northwards including Big Falls, Indian Creek and Golden Stream Village. This area also includes villages along the Big Falls Adventure Trail, namely Silver Creek, San Miguel and San Pedro Columbia. . It is expected that by 2016, tourism pressures will be upon the communities of Indian Creek (Nim Li Punit) and Big Falls Village to accommodate an immediate increase in tourism from Harvest Caye.

This area possesses several Tourism enterprises including:

Tourism Facility	Product	Challenges
Restaurants	Coleman's Cafe	<ul style="list-style-type: none">▪ No Standardized Signage▪ Poor Communication infrastructure▪ Poor Marketing Presence▪ Limited infrastructure▪ Low visitation
Accommodation	The Lodge at Big Falls/ Back-a-Bush Guesthouse	
Tour package	The Big falls Adventure Tour	
Amenities	2 Fuel Stations	
Attractions	Nim Li Punit & Lubaantun/ Spice Farm	
Tour Operators	Big Falls Extreme Adventures	
Cultural Experiences	5 Maya Cultural Experiences	

Table 14 Tourism Enterprises

Development Areas:

Proposal	Product Theme	Agent Responsible	Implementation Activities	Challenges to implementation	Estimated cost
Marketing & Product Placement	Tourism Service	BTB/BTIA	<ul style="list-style-type: none"> Promote Northern Toledo as a Destination. Promote multiple stop tour day packages. Culinary experiences Train local operators in social media marketing 	<ul style="list-style-type: none"> Many Villages in the entire district offer similar products Product Quality is inconsistent 	\$10,000
Increase Local Engagement	Product development	Tour Guides/ Operators	<ul style="list-style-type: none"> Involve local farmers in the supply chain Promote Local artisans to vary product 	<ul style="list-style-type: none"> Agro – tourism links do not exist Farmers are uneducated about the demands of the tourism industry Local culture is vulnerable to tourism influences 	\$30,000
Infrastructure Upgrades	Built environment	Government/ Park managers/Local Village Councils/Private operators	<ul style="list-style-type: none"> Tourism Signage Road access Restrooms Parking 	<ul style="list-style-type: none"> High Cost Lack of management agencies maintenance 	\$90,000
Diversify Visitor Services	Product Development	Local Tourism Provides/BTIA	<ul style="list-style-type: none"> Addition of new products (*Bicycle Tours, horseback rides etc.) 	<ul style="list-style-type: none"> Lack of ownership Access to funding 	\$30,000
Capacity Building		BTB/ ITVET/ Tumul Kin local schools	<ul style="list-style-type: none"> Train local people in Supply chain development Marketing & Branding Health and Safety management Agro Tourism Production 	<ul style="list-style-type: none"> Educational components are long term Connectivity in the Value chain is not guaranteed 	\$75,000/year

Table 15 Rural Development Zone Development Areas

Jalacte Corridor

With the exception of the newly built House of Cacao in Mafredi Village and Archaeological improvements at Hokeb Ha Cave in Blue Creek, most of the attractions along the corridor are presently undeveloped or in the case of Rio Blanco falls have inadequate tourism infrastructure to support the growth of the tourism industry. The newly paved Highway to Jalacte will no doubt increase access and visitor flow to these areas and it is expected that the cruise sector expansion in coming years will put greater demand on the developing these attractions.

Development Areas:

Proposal	Product Theme	Agent Responsible	Implementation Activities	Challenges to implementation	Estimated cost
Development of the Tourism Programme at ITVET school at Crique Jute	Capacity Building	Ministry of Education	<ul style="list-style-type: none"> Develop tourism program at ITVET providing skills training in Tourism and small business development 	<ul style="list-style-type: none"> Change to existing Curriculum may disrupt some programmes Long term results 	\$90,000
Infrastructure Upgrades	Built Environment	Government/ Park managers/Local Village Councils/Private operators	<ul style="list-style-type: none"> Tourism Signage Road access Restrooms Parking 	<ul style="list-style-type: none"> High Cost Lack of management agencies Maintenance 	\$150,000
Upgrade /Open attractions	Product development	Local Protected areas managers/ local village councils	<ul style="list-style-type: none"> Designate and declare attractions for tourism use Upgrade infrastructure to increase tourism capacity 	<ul style="list-style-type: none"> Lack of Funding Lack of training for tourism management Lack of ownership in some areas Land tenure in communal lands 	\$500,000
Diversify Visitor Services	Product Development	Local Tourism Provides/BTIA	<ul style="list-style-type: none"> Addition of new products and services. Restaurants, fuel activities etc. 	<ul style="list-style-type: none"> Low visitation Access to funding 	\$20,000

Table 16 Jalacte Corridor Development Areas

Coastal and Marine:

Toledo's Coastal and marine environment consists of several areas with Punta Gorda Town as the hub for these activities. Coastal packages extend north to Punta Negra and Monkey River and South to Barranco Village. Several tour operators and Protected Areas managers extend tour offerings to the Port Honduras Marine reserve and Sapodilla Cayes. Tour activities include diving, snorkelling, kayaking, sport fishing as well as cultural experiences in the Garifuna village of Barranco and Tours to Monkey River with stop overs in Punta Negra.

Marine infrastructure which is typically costly to build and also to maintain, has traditionally been for fishing purposes and remains rustic and dilapidated. In the National Sustainable Tourism Master Plan's call for increased tourism growth for Southern Belize particularly in the Nautical Tourism sector, there is a need to upgrade the existing infrastructure and tour products to accommodate tourism usage.

Development Areas:

Proposal	Product Theme	Agent Responsible	Implementation Activities	Challenges to implementation	Estimated cost
Punta Gorda Marina	Product Development/ Built Environment	Punta Gorda Town Board	<ul style="list-style-type: none"> Upgrade the existing Pier into a small marina, offering full service to boats 	<ul style="list-style-type: none"> Cost of Implementation Disruption to current use 	\$1,600,000
Punta Negra Tour	Product Development	Local Community/BTIA	<ul style="list-style-type: none"> Improve bathrooms Beach Services Boardwalk to lake Tour Activities 	<ul style="list-style-type: none"> Lack of ownership/management agency for maintenance and upkeep Lack of training for local residents in Tour management 	\$50,000
Barranco Village Tour	Product Development	Local Community/ BTIA	<ul style="list-style-type: none"> Renovate Pier Renovate Cultural centre Develop new ancillary services (Food, tours etc.) 	<ul style="list-style-type: none"> Low visitation High cost of transportation Consistency & Quality 	\$50,000

Table 17 Coastal and Marine Development Areas

Implementation Plan:

The Implementation of the Destination Development Plan is hinged on the desired and projected tourism growth and the importance of tourism for poverty alleviation and local economic development in the Toledo District.

Implementation of this development plan is highly dependent on tourism demand, and identifying where the expected growth patterns will impact and what level of investment is required to implement such plans. Tourism is an ever changing industry always seeking new products and emerging destinations. External factors must be taken into consideration for successful implementation and sufficient mitigation measures must be in place to protect the industry losses due to natural disasters, epidemics, travel threats, climate change and new competition.

Current Tourism Needs for implementation include:

- Marketing & Signage
- Special Events & Festival Development
- Heritage Tourism Packaging
- Product Quality & Consistency
- Labour - capacity development
 - *Hospitality – Artisans & Vendors*
 - *Hygiene – Food Handlers & Vendors*
 - *Swift water rescue – Cave Users*
 - *Business development – Product Development and Sales*
 - *Marketing and Branding*
 - *Management*
 - *Tour Guiding*
 - *Boat Handling*

Priority Investment Planning:

A priority assessment for project implementation is a critical component for developing the plan. Product development proposals were based on needs assessment, current market demand, economic viability, long term impact, potential to increase visitation, return on investment and impact on the local economy.

Product Area	Market Demand	Implementation Cost	Increases Visitation	Local Economic Impact	Return on Investment	Long Term Impact on Industry	Rank
Downtown Strip	High	High	Yes	Yes	Yes	Yes	High
Waterfront Development	High	High	Yes	Yes	Low	Yes	High
Northern Toledo	High	Low	Yes	Yes	Low	Yes	Medium
Jalacte Corridor	High	Moderate	Eventually	Yes	Low	Yes	High
Coastal And Marine	Low	High	Yes	Low	Low	Uncertain	Low

Table 18 Priority assessment of product areas

Indicators and Monitoring:

The success of the Toledo Destination Development Plan (2015- 2020) is hinged on delivering outputs that are not only measurable and quantifiable, but regularly modernized to meet trends in the industry and take corrective measures for any unplanned circumstances that may occur.

Areas of Monitoring Concerns

1. Improved understanding of the vulnerability of tourism to both the physical and economic
2. impacts of climate change
3. Improved and sustained resilience and adaptive capacity of the industry and provide certainty for the purpose of future investment;
4. Monitoring of current and future tourism trends and marketing strategies.
5. Monitoring the overall consistent and effective industry outreach channels
6. Implementation of a Destination Marketing Plan that is established on the goals and guidelines of the Destination Development Plan.

Indicators

- Arrivals/ growth rate.
- Increased in tourism investments
- Increased Visitor Spend
- Lengthened duration of stay
- Increased hotel occupancy
- Increased local employment in tourism industry
- Increases in the demand for auxiliary services such as water taxi, local airlines, spa's etc.
- Increased Market Visibility

Expected Results:

- Increased Local Employment
- New Entrepreneurial ventures
- Strengthened Cultural Development
- Improved Tourism Infrastructure
- Better access to education and training
- Increased Environmental Awareness
- Increased Investment and Economic Activity

Annexes:

Annex 1 Belize Conference on Responsible Tourism in Destinations

Annex 2 Indicators of Sustainable Development of Tourism Destinations

Annex 3 Toledo - Exit Survey Findings

Annex 4 Toledo Responsible Tourism Policy

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