

Caye Caulker Tourism Development Plan (2016-2020)



Prepared for:



MINISTRY OF TOURISM
& CIVIL AVIATION

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Caye Caulker Tourism Development Plan 2016-2020

Prepared by:

Osmany Salas

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Vision Statement

A high-quality marine tourism destination with healthy ecosystems, friendly people, and a low-key island charm sustainably harnessed by a progressive, thriving and prosperous community



Photo 1: Nurse Sharks, Caye Caulker

Goal Statements

- 1. Highly improved standards and quality of tourism products and services in Caye Caulker;*
- 2. Expanded and responsible municipal & tourism infrastructural development at Caye Caulker;*
- 3. Increased and sustained tourist arrivals and overnight stays in Caye Caulker.*

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Acronyms

BTB	Belize Tourism Board
BTIA	Belize Tourism Industry Association
CEO	Chief Executive Officer
CCBTIA	Caye Caulker Chapter of the Belize Tourism Industry Association
CCTGA	Caye Caulker Tour Guides Association
CCVC	Caye Caulker Village Council
CPR	Cardio-pulmonary resuscitation
CTO	Chief Tourism Officer
EPP	Excursion Product Provider
FIT	Free and independent travelers
FOSC	Friends of Swallow Caye
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
MTCA	Ministry of Tourism and Civil Aviation
NASIG	National Association of Specialized and Interpretive Guides
NICH	National Institute of Culture and History
NSTMP	National Sustainable Tourism Master Plan 2030
PA	Protected area
PTA	Parents-Teachers Association
PPDU	Planning and Project Development Unit
SIF	Social Investment Fund
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 Caye Caulker, 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



Photo 2: Caye Caulker, Belize

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 and Civil Aviation (MTCA) 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 MTCA 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 Caye Caulker was commissioned by the MTCA and financed by the IADB. The TDDP aims to identify priority needs and projects for Caye Caulker 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; and 3) Ecosystem service and climate change risk assessment.
- 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 Caye Caulker Village Council.

1.2 The Local Tourism Committee

The Ministry of Tourism and Civil Aviation (MTCA), 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 MTCA and the BTB, along with the Caye Caulker Village Council, have facilitated the establishment of a voluntary Local Tourism Committee (LTC) for Caye Caulker. 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 Caye Caulker within the respective tourism planning region of the Northern Islands.

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

1. Provide meaningful input and steward the Strategic Tourism Destination Planning process in Caye Caulker;
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 sectors¹:

1. Village Council
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 and Civil Aviation (MTCA) – *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 Caye Caulker 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 Caye Caulker. The plan may also serve as a basis for fundraising efforts and preparation of work plans and grant proposals.

¹ 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 5 August 2015, members of the Caye Caulker LTC participated in a planning session at Caye Caulker Plaza Hotel 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 Caye Caulker; and 3) identify the major problems impacting the development of tourism in Caye Caulker.

This session was followed up by another planning meeting on 26 August 2015, at Caye Caulker Plaza Hotel. The purpose of this meeting was to define the strategic objectives and actions for the development of tourism in Caye Caulker. A final session with the LTC was held on 14 September 2015 to conduct a SWOT analysis.

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

2. The Caye Caulker Tourism Market

The following discussion of the Caye Caulker 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".

This destination is known as an out of the way divers and fishermen's haven that prides itself on its low key informal atmosphere, village feel and affordable prices. While holding its place, it has been somewhat bypassed by the growth in tourism occurring in other parts of Belize.

2.1 Analysis of Tourism in Caye Caulker

This destination has seen its market share decline from 33% in 2006 to 26% in 2014, while the neighboring Ambergris Caye has emerged as the premier destination on the reef. Back in 2006 its arrivals were nearly on par with those of Ambergris, so its position has slipped somewhat since then. In 2014 after many years of irregular up and down performance it did reach a new peak in arrivals at 83,000 persons.

2.2 Volume, types and segments

The overall dimensions of the tourism sector operating in Caye Caulker as estimated for the baseline year 2014 are explained in this section. The key segments that make up the total demand are also explained.

Volume

The estimate for total stay over arrivals to Caye Caulker in 2014 is presented in the following table, divided into five segments. The total estimate of overnight arrivals is 82,700, with an average LOS of 4.8 days and average daily spend of \$99. This profile has been formulated on the basis of BTB statistics and the findings of the Exit Survey.

Table 1: Segmented baseline for Caye Caulker

A4 BOX OF ASSUMPTIONS - SEGMENTED BASELINE FOR CAYE CAULKER				
<u>segment</u>	<u>2014-baseline arrivals 000s</u>	<u>average length of stay</u>	<u>segment ratio</u>	<u>average daily spend</u>
Total visitors	82.7	4.8		
marine divers	33.1	4.8	40%	\$ 99.0
marine-sports fishermen	12.4	4.8	15%	\$ 99.0
marine-sports activities	16.5	4.8	20%	\$ 99.0
marine-tourists	16.5	4.8	20%	\$ 99.0
work, VFR & other	4.1	4.8	5%	\$ 99.0

Type and segments

The leisure segments are estimated to make up 95% of the demand, with work, VFR & other together making up the remaining 5% because the local industrial base is small as is the local population. The largest share, 40% is for divers, followed by participants in sports/adventure activities and general leisure tourists, each representing 20% shares. The smallest share, 15%, represents sports fishermen. All four of these segments are marine-based. 86% of respondents to the Exit Survey visiting this destination made their trip arrangements on their own. Additional content on the definition of these segments is provided in the exhibit below.

Table 2: Segments defined for Caye Caulker baseline

Segments defined for Caye Caulker baseline	
SEGMENT NAME	COMMENT
Marine - divers	Well defined segment handled by licensed operators using the reef and using Caye Caulker as cheaper alternative to San Pedro and other islands.
Marine – sports fishing	Well defined segment using islands, wetlands and the reef.
Marine – sports activities	Somewhat young segment pursuing snorkeling, sailing, skiing, kayaking, paddle boarding and other sports /recreational activities.
Marine – tourists	Visitors touring the beaches, cayes and protected areas (no sports activities)
Work, VFR & other	Any other non-leisure segments combined.

The two tables below present findings from the Exit Survey about the activities available at Caye Caulker. Respondents who had visited indicated activities they had pursued and the tally of the higher scoring activities is on the left. Respondents who had not visited Caye Caulker were asked which activities would be influential in opting to visit Caye Caulker on a future trip. Those are shown on the right. In both sets of activities, the marine activities are dominant as is enjoying cuisine and local products. The activities as influential factors for future trips got particularly high scores.

Table 3: Activities available at Caye Caulker

Caye Caulker visitors top activities		Caye Caulker non-visitors influential activities	
Swim, sunbathe, relax on beach	94%	Enjoy cuisine & local products	96%
Enjoy cuisine & local products	88%	Swim, sunbathe, relax on beach	87%
Diving, snorkeling	83%	Diving, snorkeling	87%
Visit barrier reef/Blue Hole	58%	Visits to islands & cayes	84%
Visits to islands & cayes	55%	Visit barrier reef/Blue Hole	83%
Watersports sailing, kayak, paddle board	55%	Watersports sailing, kayak, paddle board	78%
Shark/Manta Ray reserve	52%	Discover local history, culture	77%
Discover local history, culture	45%	Discover, participate arts & crafts	76%
Turneffe Atoll Marine Reserve	20%	Cultural events, shows, festivals	69%
Sport fishing	17%	Historical representations dramatized	53%
Cultural events, shows, festivals	16%	Excursions to mangrove	49%
<i>Note: not mutually exclusive</i>		Sport fishing	46%
<i>Source: Exit survey of May 2015</i>		<i>Note: not mutually exclusive</i>	
		<i>Source: Exit survey of May 2015</i>	

Respondents were queried about ten features characterizing each destination, and their needs for improvement. In the case of Caye Caulker, only one feature got a substantial “needing improvement” response higher than 20% and that was “State of general maintenance & environmental quality of beaches, coasts, and sea for carrying out activities such as sunbathing, sailing, fishing, etc.” which got a 30% response.

2.3 Main competitors, specific needs of target markets

Competition

The competition for dive tourism is broadly spread across the Caribbean and includes places like Cozumel in Mexico, Utila in Honduras, Cayman Islands, Turks and Caicos, the Virgin Islands and Bonaire. The Florida Keys also has a dive destination at Key Largo, and Cuba is likely to boost its promotion of this type of tourism with its opening to the US market. In addition, the various dive destinations in Belize itself can be considered competitive, and the variety of choice is one reason Belize diving has become so popular.

Needs of target markets

The dive, fishing and sports activities market

These sportsmen and women come to Belize because of the easy proximity of the dive and fishing spots from the islands where they are based, and because of the wide choice of such spots to try. They lose a minimum of time reaching the spots leaving a maximum of time for the key activity. It is this advantage with the logistics that have made the success of Ambergris and Caye Caulker in the world of diving and sports fishing. To cater to these enthusiasts, there is a total of 13 tour operators based at Caye Caulker and many more at Ambergris. TripAdvisor

shows a total of 19 businesses from Caye Caulker posting promotional information. There is a much higher number of similar operators on Ambergris which functions as the hub for the reef and can meet the needs for divers and sports enthusiasts of all kinds based at Caye Caulker and other locations.

The marine leisure market

This market typically seeks a beach for recreational purposes, either a public beach or one serving resort hotels. A beach is an amenity that sportsmen or divers do not need themselves. However the availability of a beach will enable them to bring friends and family members along having no interest in diving or fishing but some interest in pursuing other water-based activities. This analysis examines their needs with a view to providing a better product at Caye Caulker appealing to leisure tourists.

Currently some visitors swim at the Split but there is no distinct beach with its own perimeter separating the sandy area they use as a beach from the public walkways leading to it. People use the sandy area and dock around a popular restaurant/bar (formerly The Lazy Lizard) to sunbathe, socialize and swim. A fishing operator is based nearby as well. The current that flows through the Split can at times be strong making it unsuitable for youngsters. The Split is popular for its convenience, for the beauty of the view and for lack of any better beach that is easy to reach, but its use is an indication of an unmet need.

The availability of a well-groomed, sanitary public beach offering a range of recreational activities and served by food and drink vendors and establishments not only will draw a broader market but may raise the appeal of the destination in the off-peak months especially July-August vacation months in North America.

2.4 Bottlenecks identified

Two bottlenecks or obstacles hindering the growth of tourism are indicated in the Table 4.

Table 4: Caye Caulker bottlenecks

Bottleneck/obstacle	
Segments affected	Relating to the business environment
Marine tourists	The lack of a spacious and well maintained beach for general recreation purposes and light sports is a drawback in attracting leisure tourists and particularly divers and fishermen wishing to travel with friends and families.
Marine tourists	The split that divides the main island from the north island is impeding the development of new amenities such as a nature park, higher quality lodging and more recreational or entertainment services needed to attract higher income markets. Any facility located on this island is not easily reached by visitors staying at Caye Caulker since it requires hiring a boat.

SECTION 2: THE TDDP



Photo 3: Caye Caulker

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 Caye Caulker’s 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 Caye Caulker faces serious challenges which constrain its ability to guarantee its long-term responsible development. At the same time, however, there are key opportunities that could direct Caye Caulker towards more responsible tourism development.

Political issues are characterized by the individualism that pervades Caye Caulker as a community. While the multi-sectoral LTC is seen as a positive development to address the community divisions (mostly brought about by partisan politics), Caye Caulker’s municipal development is constrained by Government’s neglect of village development needs. To compound the development challenges, Caye Caulker’s village status has not helped – the village is not allowed under the Village Councils Act to introduce necessary bylaws to facilitate and regulate development. Zoning laws and building codes of the Central Building Authority (CBA) are oftentimes ignored or bypassed, and the village council is rarely informed before infrastructural development commences. Developers tend to ignore the CBA guidelines and regulations. Also, there is insufficient communication among the relevant authorities when it comes to mangrove clearance for development. Although the cutting of mangroves requires a permit, developers would rather pay the low fine than go through proper permitting procedures. Caye Caulker’s small voter base has resulted in Government directing little attention to the island as compared to San Pedro. At the same time, however, Caye Caulker’s small and independently-thinking resident population could be an asset to creating stronger and lasting collaboration among the different sectors in the community. Caye Caulker’s economy is fully tourism-based, which creates an opportunity for the LTC and the CCVC to build inter-sectoral collaboration and, by extension, foster greater community cohesion. For example, the CCVC has subdivided the island into zones to improve community support, an initiative that has been having positive results. Several NGOs and civic groups have also shown the wherewithal and the interest to work together. For example, CCBTIA has entered into partnership agreements with FOOSC, CCTGA has been working with NASIG, and the PTA has been quite active. The Police Department Formation at the island has improved its relationship with the village by conducting community policing and citizen patrols. The CCTGA has played a lead role in the LTC.

On the **economic** front, Caye Caulker has a high percentage of the national overnight market share but a low percentage of per capita visitor spending (since many of its visitors are budget travelers). Caye Caulker is by-and-large a very affordable destination, but the absence of cultural events and alternative entertainment opportunities does not give visitors much reason to come out of their hotel rooms after a day of water-based activities. Even so, there seems to be an upsurge of Europeans visiting with their families – an opportunity that should be capitalized on. The challenge will be to improve the quality and standards of the Caye Caulker tourism product while still being competitive in terms of prices, and finding ways to increase visitation to the island during the very slow months of September to November. Caye Caulker’s affordability as a destination has been hard to maintain, given that the cost of goods and services are very expensive compared to the mainland prices. The high cost of opening a business coupled with high commercial interest rates make it very difficult for local residents to invest in the tourism industry. Meanwhile, expatriates are increasingly getting a foothold in the industry because of their stronger investing capacity (access to financing). Meanwhile, the vicious price war (price fixing) among tour operators (e.g. half-day, Swallow Caye and Hol Chan tours) is detrimental to the development of local tourism enterprises.

Social issues are characterized by generational changes, in particular the indifferent attitudes among youth in relation to cultural expression, which is rarely seen on the island. The younger generation is simply not into the “culture thing” and instead increasingly subscribes to a consumerism culture partly driven by the incessant bombardment of American television programming. Drug use and trafficking on the island has grown to unprecedented levels among both the resident and visiting population, exacerbated by an insufficient Police presence. Public drinking is also a pervasive problem. Health care services on the island are inadequate, with only one clinic in place providing minimal services. The harassment of tourists and villagers (especially females) impacts business. If not addressed, this harassment could irreversibly tarnish Caye Caulker’s image as a welcoming destination. Already, the island has steadily been losing its “friendliness” and welcoming attitude that was once the order of the day. Changing demographics (more mainlanders living and working on the island) and the steadily increasing population density of the island may also be contributing to this changing welcoming small island spirit that once characterized Caye Caulker. Customer service among places of business are sub-standard. The business community has also lost the spirit of corporate social responsibility.

Technological challenges at Caye Caulker are characterized by the lack of adequate tourism infrastructure such as proper signage (directional and informational) and a tourism information center. The airstrip needs to be upgraded as it lacks adequate facilities such as air traffic control, proper terminal, lighting, fencing, and other safety protocols. In the same vein, a water taxi terminal is needed on the leeward side of the island. Currently, each water taxi operator has its own terminal on the windward side, which should be zoned for water-based tourism activities with reduced boat traffic. In terms of communications, internet is available for customers at most places of business on the island, such as at restaurants and hotels. However, there is a need for more Wi-Fi hotspots for the general

public and visitors. All electricity on the island comes from a diesel generated power plant. The IDB has selected Caye Caulker as one of three islands in the Caribbean to participate in a feasibility study to determine the potential of phasing out diesel generated power with solar energy.

Environmental challenges are growing in number and severity. Overall, the lack of proper land use planning is seen as a cross-cutting problem. Beach erosion is a perpetual problem, with most of the erosion concentrated from the Split southward to the center of the island. Sand being “artisanally” mined from the Split area, boat traffic and unregulated mangrove clearance are the greatest contributors to the beach erosion taking place. Caye Caulker does not have a sewage system; only individual/residential septic tanks are in place. The disposal of untreated sewage into the mangrove areas (The Dump”) is a common occurrence and could have direct impacts on the nearby reef systems, which are already under stress from climate change and unregulated tourism activities (snorkeling, guiding, fishing, long-stay boats, etc.). The island has a reverse osmosis water purification system, but no one knows where the waste water is disposed of and what environmental impacts the disposal may be causing. The non-potable tap water has a foul odor but villagers have no option but to use it. Climate change impacts are already evident (e.g., hotter days, sea level rise, sargassum volumes, etc.). Public health problems (such as respiratory ailments) may soon start to manifest themselves as a result of worsening air quality impacts from increased boating traffic. The latter also has the potential of damaging the slow-moving manatees. The Caye Caulker Forest Reserve holds great potential for the island in terms of alternative land-based tourism and recreational activities (e.g., birding, trails in the littoral forest, camping, and crocodile watching).

Annex 2 provides the detailed results of the PESTE analysis.

3.2 Vision for Caye Caulker’s Tourism Industry

After careful consideration of the external issues and trends that impact the development of Caye Caulker’s tourism industry, the Vision Statement and Goal Statements shown in the boxes below were defined and agreed to 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 high-quality marine tourism destination with healthy ecosystems, friendly people, and a low-key island charm sustainably harnessed by a progressive, thriving and prosperous community***

Caye Caulker is known as an out of the way divers and fishermen’s haven that prides itself on its low key informal atmosphere, village feel and affordable prices. While holding its place, it has been somewhat bypassed by the growth in tourism occurring in other parts of Belize.

The destination will build on its current appeal and position itself as a high-quality marine tourism destination with healthy ecosystems, friendly people and a low-key island charm. The island will be family friendly and a safe place to visit, where the sandy streets will be well maintained and no motorized vehicles (except for service vehicles) will be allowed. The residents will be industrious and genuinely welcoming displaying a progressive, thriving and prosperous community with a low-key island charm but still connected to the rest of Belize and the world. The destination will remain popular among marine-based tourists for its healthy and well-managed reef systems and other ecosystems, as well as for the plethora of sea, sun and beach activities offered. Other key products it will offer include cultural experiences reflecting themes such as the Mestizo heritage, historical themes, and the purpose of the Caye Caulker Marine Reserve and Forest Reserve, as well as resorts and other points of interest around the island.

The segments to target include mainly tourists who come for marine-based activities (i.e., divers, sports fishers, and snorkelers), general leisure tourists, as well as travelers visiting friend and relations (VFR) and other non-leisure segments. A growing segment will be tourists who travel along with their families, including children.

3.2.2 Purpose Statements (Goals)

By some measures, Caye Caulker is one of the stronger performing tourism destinations in Belize in terms of the number of its overnight visitors per year but is the destination with the lowest average daily expenditure in the country.

Caye Caulker is the second most popular destination for overnight visitors in the country after Ambergris Caye, with 26% of the overnight tourism market share in 2014. This reflects a market share decline from 33% in 2006, while the neighboring Ambergris Caye has emerged as the premier destination on the reef. Back in 2006 its arrivals were nearly on par with those of Ambergris, so its position has slipped somewhat since then. Caye Caulker is the most popular destination for European tourists. In 2014, 63.2% of European tourists stayed at Caye Caulker. However, only 17% of American tourists whose share in the total overnight visitors is the largest (69.3% in 2013) in the country visited the destination. In 2014 after many years of irregular up and down performance it did reach a new peak in arrivals at 83,000 persons.

Although the number of overnight tourists has been growing since 2009 in the whole country, the number of visitors to Caye Caulker has been fluctuating between 60,000 to 80,000. In addition, the average daily expenditure by European visitors in Caye Caulker is US\$79 in 2013 which is the lowest among the major destinations in the country. Caye Caulker is the most popular destination of the most-thrifty travellers. It indicates the revenues Caye Caulker gains from the tourism sector is relatively small, even though the popularity is the second highest in the country.²

Table 5 shows a set of various performance indicators for Caye Caulker's tourism.³

² Sources: BTB and Action Plan for Sustainable Tourism Development of Caye Caulker (M. Osada, July 2015)

³ Source: Tourism Market Study and Identification of Investments for the Sustainable Tourism Program II in Belize (Manuel L. Knight, July 2015)

Table 5: Dashboard of indicators for Caye Caulker⁴

Dashboard of indicators for Caye Caulker	
Indicator-Arrivals	Comment/Trend
Growth rate 2006-2014	Flat at 0.3% per annum
Arrivals performance since 2006	Rising from 81,000 to 83,000 in 2014 after major slump. Its market share has fallen from 32% in 2006 to 25% in 2014.
Arrivals performance since 2010	Below average growth at 5.6%. Reached new peak in 2014.
Average spend of \$99 per person per day	This is a finding from the Exit Survey. The national average spend of \$164 (per VEMS) is 64% higher. 78% of visitors used hotel accommodation (national average of 71% - VEMS 2013).
Length of stay 4.8 days	Below the national average stay of 6.7 days <i>in Belize</i> (VEMS 2014).
Resources	
Hotel capacity 2015 and performance	Has 712 rooms, 10% of national capacity. Average hotel size is 7 rooms. Achieved a \$69 average room rate, 43% room occupancy for 2014 (compared to \$141 and 47% national averages).
Tour guides/ tour operators	Has 61 guides out of a total 1,481 in 2013. 13 tour operators are registered in this caye (of total 209).
Areas visited	Caye Caulker Marine Reserve (10,800 visitors in 2008) and Caye Caulker Forest Reserve on north island
Accessibility	
Air service	2 airlines run a total of 11 daily flights to Belize City, 10 to San Pedro.
water taxi services	High frequency services are available from Belize City and San Pedro.
Travel Trade	
Role of tour operators	Minor. On the Exit Survey 4% (6 respondents) visiting Caye Caulker used tour operators. 86% of respondents organized their travel "on my own".
Main competitors	Cozumel, Utila, Turks & Caicos, Cayman Islands, Bonaire, Cuba in the future
Exit Survey Highlights	
Reasons for not visiting Caye Caulker on this trip	25% for <i>lack of information/unaware of what it is, what is offered</i> ; 47% for <i>not enough time to visit</i> (non-visitors responding)
Reasons to visit on a future trip	<i>Value of its cultural and/or natural patrimony</i> was the only strong response (96%) on reasons to visit on a future trip (non-visitors responding)

⁴ Source: "Tourism Market Study and Identification of Investments for the Sustainable Tourism Program II in Belize" Draft Report (Manuel L. Knight's, July 2015)

Marine reserves as influence for a future visit	“Would a trip to the following marine reserves influence you to choose Caye Caulker for a future visit?” yes response rates per each of 4 sites fell in the range 79%-83% Caye Caulker Forest and Shark/Manta Ray reserves top scoring (non-visitors responding)
Activities most influential for a future visit	<i>Enjoying the cuisine, diving/snorkeling and swimming/sunbathing on beach</i> are the most influential activities (non-visitors responding). Same 3 activities topped the list of activities done by visitors.
Willingness to spend, length of stay	Maximum amount willing to spend total \$470 per trip, \$160 per day, for 3-5 nights (non-visitors responding)
Inclination to visit again and recommend	Of respondents who visited Caye Caulker 90% would visit again, and 96% would recommend it to other persons. (visitors responding)

The tourism services currently available at Caye Caulker are listed below.

1	<p><u>Snorkeling and Diving</u></p> <p>Many visitors to Caye Caulker snorkel the reef and surrounding areas. Diving is also a major activity. The island provides various options for tourists to get certified for scuba diving (the training takes about 4 days). Several dive shops on Caye Caulker offer both PADI and NAUI certification classes and diving at a variety of sites by day and at night. Typical trips include diving the walls in the Caye Caulker Marine Reserve, Hol Chan Marine Reserve, Turneffe Islands, Half Moon Caye, Long Caye at Lighthouse Reef and other locations on the Belize Barrier Reef.</p>
2	<p><u>Excursions</u></p> <p>Caye Caulker Marine Reserve – The tour includes snorkeling the barrier reef, swimming with nurse sharks and eagle rays.</p> <p>Hol Chan Marine Reserve – The tour includes snorkeling the marine reserve as well as with sharks and rays in the Shark Ray Alley. A lunch stop at San Pedro is also included.</p> <p>Blue Hole and Half Moon Caye – Diving the Blue Hole Natural Monument to see the ancient, collapsed cave made famous by Jacques Cousteau. The walls at Half Moon Caye and Long Caye are also provide optional dive spots. The tour may also include a stop at Half Moon Caye Natural Monument, which has a tower for visitors to observe the Red-footed Booby and Magnificent Frigate Bird rookery.</p> <p>Night Diving and Snorkeling – Provides the opportunity to observe sea creatures that tend to come out at night.</p> <p>Manatee Tour - Tours from Caye Caulker to Swallow Caye to observe the West Indian Manatee in their natural habitat. Most tours to see the manatees also go on to visit Goff's Caye, a small, uninhabited island right on the reef. Lunch is provided at Goff's Caye.</p>
3	<p><u>Fishing</u></p>

	Fly-fishing tours for bonefish, permit or tarpon in the shallows, trolling for barracuda inside the Belize Barrier Reef or in the deep ocean beyond the barrier reef.
4	<u>Wind Surfing and Kite Surfing</u> For most of the year, Caye Caulker has a robust east wind blowing, making it an ideal place for wind surfing and kite surfing.
5	<u>Shopping</u> Caye Caulker offers nearly two dozen gift shops which provide a wide variety of gift items, clothes, souvenirs, and t-shirts.
6	<u>Dining</u> Caye Caulker has approximately 25 restaurants that offer Belizean and international cuisine.
7	<u>Dancing</u> Dancing is a favorite nighttime activity on Caye Caulker, especially on weekends. Holiday celebrations and fundraisers usually include dancing, sometimes to live music.
8	<u>Bird Watching/Nature Walks</u> Expert tour guides are available to offer guided walks and bird watching tours. Over 100 species of birds have been recorded at Caye Caulker, some of which are rarely seen elsewhere but are commonly observed on the island, such as the White-crowned Pigeon, Rufous-necked Woodrail, and Black Catbird.

Tourism stakeholders will need to create the enabling environment for the vision to build on the above-listed tourism services and position Caye Caulker as a high-quality marine tourism destination with healthy ecosystems, friendly people and a low-key island charm to 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 Caye Caulker;***
- 2. Expanded and responsible municipal & tourism infrastructural development at Caye Caulker;***
- 3. Increased and sustained tourist arrivals and overnight stays in Caye Caulker.***

To achieve these goals, several core actions will be implemented under six strategic objectives as described in the following section.

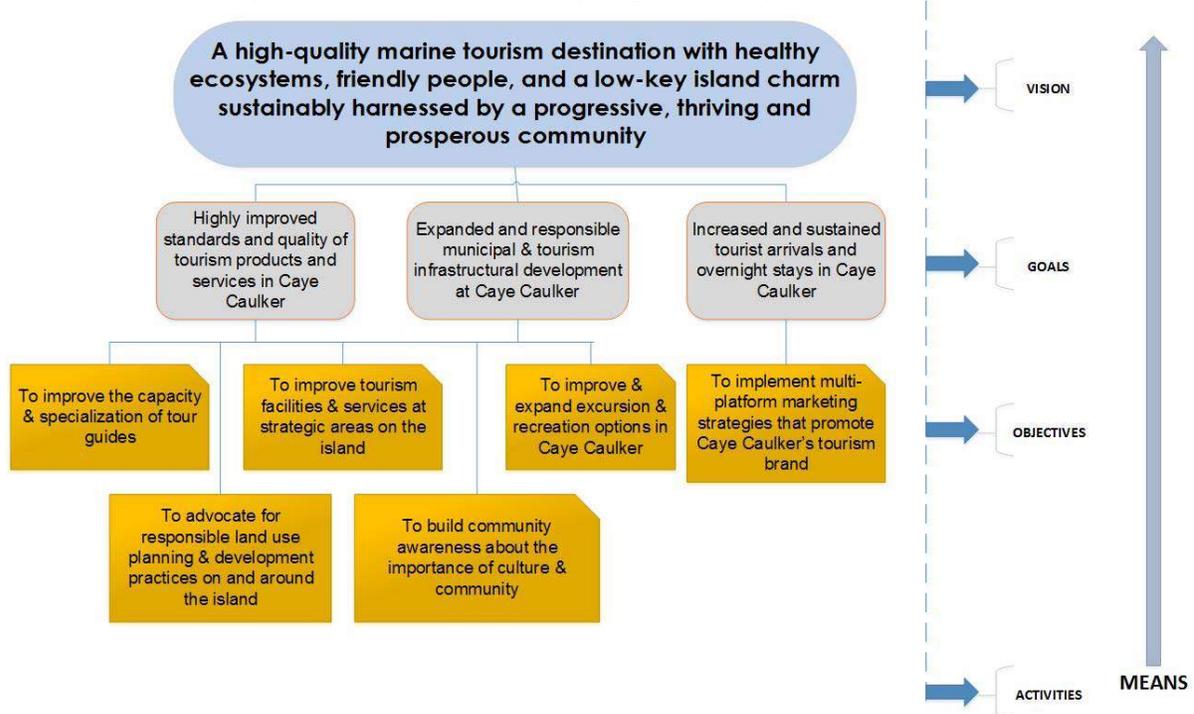
3.3 Objectives and Strategic Actions

The aforementioned Vision Statement and Goal Statements provide the targets, which Caye Caulker tourism stakeholders intend 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 and actions that form the core of the TDDP (Figure 1).

The Caye Caulker LTC will play a key role in championing the implementation of the TDDP. A SWOT analysis of the LTC was conducted to analyze the LTC’s internal strengths and weaknesses and external opportunities and threats that may positively or negatively affect the committee in its efforts to achieve the objectives of the TDDP. The relevant results of the SWOT analysis, shown in Annex 3, have been incorporated into the TDDP action plan, which is described below and summarized in Sections 3 and 4.

Figure 1: Vision, Goals and Key Objectives (Caye Caulker TDDP)



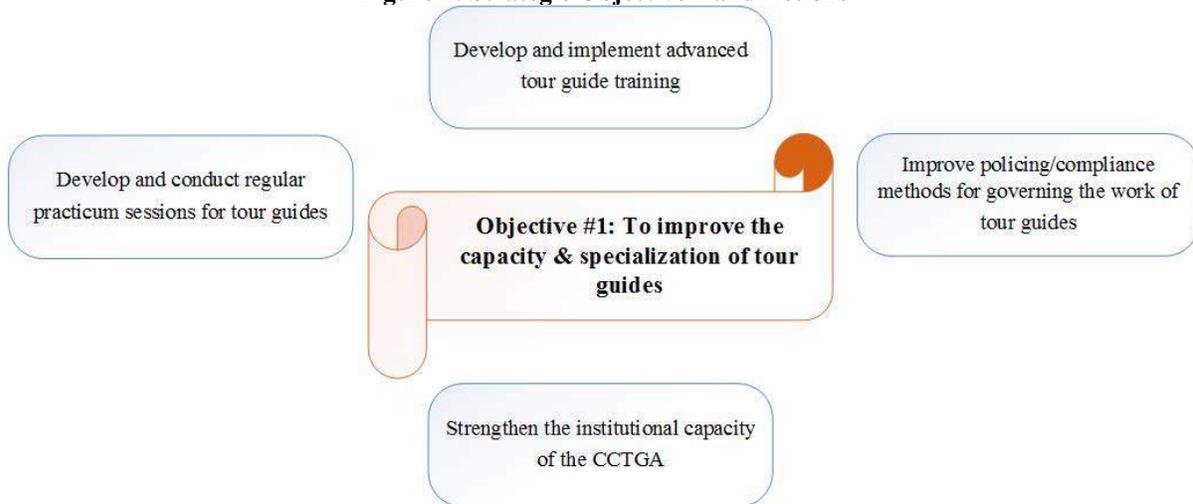
3.3.1 Objective #1: To improve the capacity & specialization of tour guides

Poor or sub-standard hospitality and customer service skills among tour operators and guides limits provision of quality experiences.

While Caye Caulker is seen as a charming destination, the services of its tour guides need to be significantly improved. 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 tour operators 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 Caye Caulker.

To improve the capacity and specialization of tour guides, the following strategic actions are recommended (Figure 2). These are described below.

Figure 2: Strategic Objective 1 and Actions



1. Develop and implement advanced tour guide training

A comprehensive training needs assessment will be conducted to determine the capacity levels of certified tour guides and their advanced capacity building needs. While the assessment would indicate the capacity gaps and training needs, Caye Caulker Local Tourism Committee (LTC) members have suggested that advanced training should focus on improving skills in communications, customer service, and public relations. Training should also aim to develop the education of tour guide, in areas such as marine ecosystems and their importance. Training would also aim to develop the specialization of tour guides in activities such as bird watching, crocodile viewing, mangroves and littoral forests interpretation, and so forth. The LTC would advocate for such specialized training courses to be incorporated into the tour guides training handbook.

2. Develop and conduct regular practicum sessions for tour guides

To maintain high standards of tour guiding services, regular practicum sessions for tour guides will be developed and conducted. For example, tour guides will be encouraged to participate in annual boat handling/captain assessments, CPR and water rescue training to ensure that their skills in that area are above par. Tour guides who participate in such practicum sessions will be awarded a certificate of participation and given preferential placement by the Caye Caulker Tour Guides Association in its guiding rotation schedule.

3. Strengthen the institutional capacity of the CCTGA

The Caye Caulker Tour Guide Association (CCTGA) is well positioned to represent the interests of the majority of tour guides based on the island. Currently, the CCTGA Vice Chairman serves as the Chairman of the Caye Caulker LTC. The CCTGA will play a key role in organizing tour guides and encouraging them to improve their capacities. The CCTGA will also promote camaraderie among tour guides via awareness and information sharing campaigns. To enable it to perform its functions effectively, the CCTGA will need to receive institutional strengthening support in the form of an office and core administrative staff.

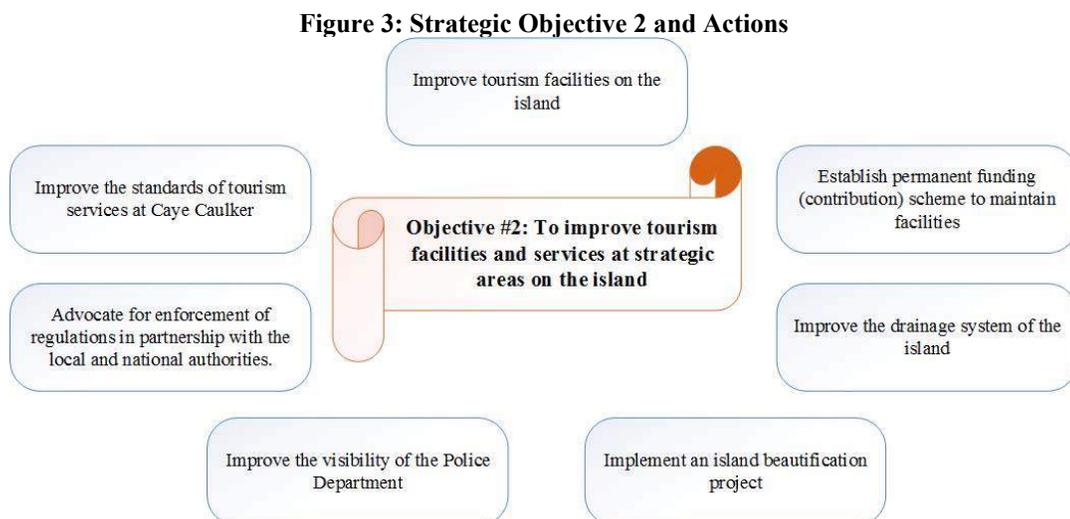
4. Improve policing/compliance methods governing the work of tour guides

The CCTGA will also play a key role in ensuring that the services delivered by its tour guides are maintained at a high standard. The CCTGA will do this by monitoring the work of tour guides to ensure that they are complying with the rules and regulations governing their work. For example, the CCTGA will ensure that tour guides have valid licenses and permits, ensure that the ratio of tour guides to size of tour group is appropriate, and develop and maintain a tour guide log documenting where tour guides work, number of guests served, places visited, complaints recorded, and so on. The latter tour guide log will help the CCTGA to address complaints and other incidents in case these arise.

3.3.2 Objective #2: To improve tourism facilities and services at strategic areas on the island

The main tourist attraction of Caye Caulker is that of a low cost diving and sports fishing destination with ideal access to the barrier reef. Caye Caulker also welcomes water sports enthusiasts and leisure visitors to enjoy its Caribbean island lifestyle and relatively unspoiled nature. The needs for the dive and sports fishermen tourists appear to be adequately met. However, the needs of sports-minded tourists and general leisure visitors can be improved. The average length of stay of 4.8 days is a relatively short one. Improvements to tourism facilities on the island would serve to expand group size with divers and fishermen bringing more friends and family, and secondly to extend the length of stay by providing a larger variety of sport and recreational activities.

The Caye Caulker LTC identified the following strategic actions to improve tourism facilities and services in the short and medium-term (Figure 3). These are described below.



1. *Improve tourism facilities on the island*

An enhanced public beach is proposed to enhance the experience of all segments visiting Caye Caulker. It would have at least 400-500 feet of frontage on the sea in the Palapa Garden and “Playa del Nino” area. The beach reclamation works should follow proper environmental protection guidelines in line with an environmental compliance plan approved by the Department of the Environment and necessary permits from Government of Belize for any dredging and reclamation effort.

Associated services that would need to be offered include: properly designed and strategically located public restrooms and showers, changing rooms, beach chairs and umbrellas, space for volleyball, Frisbee and other light sports, food vendors, a kiddies section, life guard surveillance and first aid. Yoga, Zumba and aerobics classes could also be offered and as such it would function as an open air health club. If space allows, one or two cafes could be given land leases on the fringe or arranged as sub concessions. At some times of the year small carnivals or festivals could be held to add cultural interest to the village’s life. This proposal is intended to enliven the stays especially of non-divers and fishermen visiting the island. The responses from the Exit Survey attest to the strong interest the tourists have in enjoying beaches and discovering local cuisine, and sampling the culture in different ways⁵.

The public restrooms, showers and changing rooms could be operated by a concession holder so that they are well maintained at all times. This suggests that a fee will be charged for the use of those facilities. The village council will regulate the concession.

It has become necessary to develop a central water taxi terminal on the leeward side of the island. This terminal would replace the two water taxi docks on the windward side. The current water taxi docks would then be developed as public swimming areas with associated services, such as public restrooms and showers, changing rooms, beach chairs and umbrellas. These developments would be another opportunity for village to generate much needed funds for its municipal obligations.

Well-designed welcoming, directional (way-finding), and location signs will also be installed within Caye Caulker to facilitate visitors during their stay. In the same vein, one or two information booths will be installed at strategic points on the island. These booths could be operated by either the CCTGA or the CCBTIA or both.

2. *Improve the standards of tourism services at Caye Caulker*

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. Related to this,

⁵ Source: Caye Caulker Exit Survey Findings, PDU, MTCCA

regular customer service training will be offered to tourism service providers. Attention will also be placed on improving the service standards for the food service sector and the island taxi association(s), and implementing a comprehensive management system for Caye Caulker.

3. *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.

4. *Improve the visibility of the Police Department*

The Police Department has recently been improving its liaison and rapport with the community. Such community policing will be expanded. The village council will support the Police Department by improving beach access to increase foot and bicycle patrols throughout the island.

5. *Improve the drainage system of the island*

Like many municipalities in Belize, Caye Caulker does not have a drainage system nor a sewage system. An engineering study of the island will be conducted. Based on the results of this study, a drainage system plan (including implementation budget) will be developed. The CCVC will explore the availability of financing (e.g., through the Social Investment Fund) to install the island’s drainage system either by sections or on a whole, as funding allows. Improvement of the drainage system should be done before the improvement of streets and paths.

6. *Implement an island beautification project*

In consultation with the LTC and the CCVC, a survey of the present conditions of the paths and streets of the island will be conducted, and a path and streets improvement plan developed. The plan will seek to install coloured permeable block pavement of sidewalks and pedestrian areas and to install street furniture (such as tables, benches, monuments, signposts and flowerbeds). The plan will also include the renovation of public parks and, where necessary, the will recommend a new network of pedestrian paths and streets. Crucially, a management plan to monitor the newly constructed network of pedestrian paths, streets and public facilities will be developed. The CCVC will be trained on how to adequately monitor the facilities via the management plan.

7. *Establish permanent funding (contribution) scheme to maintain facilities*

One of the perpetual challenges to implement plans and strategies is the availability of funding (or lack thereof). Caye Caulker will create a village tourism fund that will be used toward paying for the regular maintenance of public facilities. Monies of the fund will be sourced through fees assessed on tourism concessions (such as the restroom and changing room concessions) and other similar fees. Initial seed funding will be sought from GOB and international funding agencies (such as the IDB). Funding from the Caye Caulker Tourism Fund will complement municipal and Central Government funding for village infrastructural maintenance and upgrade. It does not intend to replace Government funding.

3.3.3 **Objective #3: To improve and expand excursion and recreation options in Caye Caulker**

The following strategic actions will be implemented as necessary precursors to improving and expanding tourism excursion and recreation options in and around Caye Caulker (Figure 4). These are described below.

Figure 4: Strategic Objective 3 and Actions



1. *Develop alternative onshore and near shore attractions*

A proposed enhancement is a nature park on the north island. Covering several acres on land and water, it would offer a much quieter experience in tone, have sandy paths and some boardwalks to stroll or cycle on, picnic tables and a wooden observation tower. It could also have a swimming and snorkeling area, and another with kayaking and canoe tours through the mangrove. Visitors could spend half a day of exercise in this peaceful, natural setting, quite unlike Caye Caulker. Since much of the land on the north island (south of the Caye Caulker Forest Reserve) is privately owned, a land use plan with delineation of properties and rights would be agreed to avoid incompatible development. In many countries the mixing of natural areas with privately owned ones has been accomplished to the benefit all land owners which is where the land use plan can be critical. However, it may be possible for this facility to be developed in the Caye Caulker Forest Reserve (CCFR).

The Caye Caulker LTC has also proposed an expansion to the north end of the CCFR for nature trails and other visitor facilities to accommodate tourism. Observation points and designated rest/seating areas are also proposed on public land for the viewing of tarpon. A non-profit (such as Caye Caulker BTIA) or private entity could be awarded the concession(s) to operate one or more components of the proposed nature park. There is precedent in Belize for both of these possibilities. If this park is successful it might draw visitors on excursions from San Pedro as well.

2. Enhancement of Mini Reserve and Visitors' Centre

The CCBTIA intends to secure a long-term lease for an area of land called “the Mini Reserve” located near the municipal airstrip. The BTIA Chapter proposes to put in interpretive nature trails and well-designed walkways on the property; the Chapter will also relocate its building on the property to the street side and develop it into an interpretive visitors' centre and museum focusing on the environment and culture of the island. This CCBTIA facility will provide an alternative activity to tourists staying on the island.

3. Establish a bike trail and boardwalk at South Point Reserve

A 25-acre tract of land known as the South Point Reserve may be available for development into a public access bike trail and boardwalk. Before proceeding with designing any such facilities, however, the LTC and the village council would need to determine the land tenure or protection status of the property. The goal would be to allow access to the area, intertwined with the existing path, for pedestrian and cyclist access and usage. Beautification, installation of benches, restrooms, and other improvements would need to be done as well.

4. Establish a Community Billboard or Information Center

The CCBTIA proposes to develop a visitors' center near the municipal airstrip. However, another such facility is needed near the center of the village where the majority of tourists congregate. A tourist information/welcome center similar to the ones in San Ignacio (Cayo Welcome Center) and Orange Walk (Tourist Information Center) would be built. The center would provide information about excursion/tour options, dining options, accommodations, water taxi schedules, and other relevant information useful to the tourist. A community billboard would be installed at or next to the center and will provide information about the various cultural and entertainment events taking place on the island (such as festivals and dances).

5. Development of park and sporting complex in Bahia

What currently serves as the basketball court would be retrofitted to serve its original purpose – a park and sporting complex. Instead of just functioning as a basketball court, the location would also be enhanced to allow for cultural activities and other recreational activities. Restroom facilities would also be put in place, and the location would be beautified with potted plants, absorptive block pavement, benches, and the like. This facility, which will be sanctioned by the National Sports Council, will be used not only for sports activities but also

for cultural events and concerts. The building will therefore provide an important venue for cultural expression. A feasibility study should be conducted prior to any works to carefully analyse the potential for conflicts of use and present recommendation to address these.

3.3.4 Objective #4: To build community awareness about the importance of culture and community

The planning team was of the opinion that achievement of the vision for Caye Caulker's tourism development should first and foremost be for the benefit of the local residents. Foreign visitors would be most welcome to experience Caye Caulker as a high-quality marine tourism destination with healthy ecosystems, friendly people, and a low-key island charm. The main beneficiaries of tourism (and community) development would be the residents of Caye Caulker and the rest of Belize. Tourism development goes hand in glove with community development. However, the latter has occurred haphazardly at best.

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 Caye Caulker tourism industry. The social issues identified included the indifferent attitudes among youth in relation to cultural expression, which is rarely seen on the island. The younger generation is simply not into the "culture thing" and instead increasingly subscribes to a consumerism culture partly driven by the incessant bombardment of American television programming. Drug use and trafficking on the island has grown to unprecedented levels among both the resident and visiting population, exacerbated by an insufficient Police presence. Public drinking is also a pervasive problem. Health care services on the island are inadequate, with only one clinic in place providing minimal services. The harassment of tourists and villagers (especially females) by locals has been a growing problem. As a result, the island has steadily been losing its "friendliness" and welcoming attitude that was once the order of the day. Changing demographics (more mainlanders living and working on the island) and the steadily increasing population density of the island may also be contributing to this changing welcoming small island spirit that once characterized Caye Caulker.

The core objective of building community awareness about the importance of culture and community will be achieved by implementing the following strategic actions (Figure 5). These are described below.

Figure 5: Strategic Objective 4 and Actions



1. *Build community awareness of Caye Caulker's cultural heritage*

The LTC, with the support of NICH, will commit to actions aimed at disseminating knowledge of the traditional and historical aspects of Caye Caulker's culture. This knowledge dissemination will be for the benefit of the residents of Caye Caulker, as well as visitors to the island. 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 the island'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* in Corozal Town or *Sidewalk Arts and Music Festival* in Placencia will be fostered and promoted in order to display the number of traditional skills currently practiced in Caye Caulker. Many of these skills provide an opportunity for income generation through the production of authentic products.

Educational and cultural awareness programs will be developed focusing on Caye Caulker's tangible and intangible cultural heritage targeting students at the various schools.

2. *Build the LTC's role in sensitizing the community about the importance of community*

The LTC – in partnership with the village council, the CCBTIA, the private sector, and schools – will implement a civic pride campaign (an "I am Caye Caulker" campaign) that will focus on instilling a sense of community ownership and pride among the citizenry of the island 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 schools. 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 village council 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 village council to ensure that this occurs.

3.3.5 Objective #5: To advocate for responsible land use planning and development practices on and around the island

The external environment scan (see Section 2.1) listed key external environmental issues and trends that have impacted the development of the Caye Caulker tourism industry. Beach erosion is a perpetual problem, with most of the erosion concentrated from the Split southward to the center of the island. Sand being “artisanally” mined from the Split area, boat traffic and unregulated mangrove clearance are the greatest contributors to the beach erosion taking place. Caye Caulker does not have a sewage system; only individual/residential septic tanks are in place. The disposal of untreated sewage into the mangrove areas (The Dump”) is a common occurrence and could have direct impacts on the nearby reef systems, which are already under stress from climate change and unregulated tourism activities (snorkeling, guiding, fishing, long-stay boats, etc.). The island has a reverse osmosis water purification system, but no one knows where the waste water is disposed of and what environmental impacts the disposal may be causing. The non-potable tap water has a foul odor but villagers have no option but to use it. Climate change impacts are already evident (e.g., hotter days, sea level rise, sargassum volumes, etc.). Public health problems (such as respiratory ailments) may soon start to manifest themselves as a result of worsening air quality impacts from increased boating traffic. The latter also has the potential of damaging the slow-moving manatees. The Caye Caulker Forest Reserve holds great potential for the island in terms of alternative land-based tourism and recreational activities (e.g., birding, trails in the littoral forest, camping, and crocodile watching).

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

Figure 6: Strategic Objective 5 and Actions



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

The Caye Caulker 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.

2. ***Establish the LTC as a multi-sectoral monitoring 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 (see Section 2.3.2), the committee will also encourage local NGOs and groups to serve as “environmental watchdogs”. In this latter role, the LTC will raise awareness about relevant environmental legislation to empower Caye Caulker civil society organizations to report to the relevant authorities any incidents or development activities that may impact or are impacting the ecological systems in and around Caye Caulker.

The membership of the LTC 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.) Such liaison will serve to allow for improved monitoring of infractions and facilitate effective and consistent enforcement of laws.

For the short to medium-term, the LTC will also lobby the village council and Central Government to introduce a Garbage Management Project related to the National Solid Waste Management Program. It is noted that a waste transfer station is already being developed on the island. 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.

3. ***Promote zoning and 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) 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 the village council to monitor developments and enforce relevant local regulations. Environmental NGOs will play a key role in also serving as environmental watchdogs and promoting compliance of zoning regulations and environmental laws and regulations.

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

The CCBTIA can provide leadership 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 Chapter, through its National Secretariat,

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. 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.⁶ For the CCBTIA 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.

5. *Establish an awards/incentive program that recognizes businesses exemplifying both environmental and social corporate responsibility.*

Related to the quality assurance action (see Section 2.3.2), 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.

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

3.3.6 Objective #6: To implement multi-platform marketing strategies that promote Caye Caulker's tourism brand

Currently, there is inadequate information available to tourists to advise them about existing tourism excursion products/services at Caye Caulker. Access to information will become even more important as new excursion and recreation options are instituted on the island, including within the CCFR. If information is not made readily available, the result could be that few visitors will spend more time on the island. Existing web portals lack design and functionality to really intrigue tourists to extend their stays on the island. A significant gap is the lack of a practical and informative map of the tourist attractions and excursion options.

The core objective of developing and implementing multiplatform marketing strategies that promote Caye Caulker's tourism brand will be achieved by implementing the following strategic actions (Figure 7). These are described below.

Figure 7: Strategic Objective 6 and Actions



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

The LTC will champion the need for a participatory process to develop a comprehensive tourism marketing plan for Caye Caulker, and will seek the support of the BTB for this to occur. 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 lack of understanding of these aspects have made several enterprises unsure of, for example, the barriers to attracting non-European markets in the first place. The marketing plan will focus on attracting new/alternative markets (such as the Mexican and Central American markets), as well as increasing the attractiveness and draw of Caye Caulker as a destination for domestic and North American travelers, as well as for the European travelers along with their families.

2. *Reinforce Caye Caulker's brand*

In line with the priorities defined by the BTB and the NSTMP, Caye Caulker tourism industry stakeholders will be supported in creating and reinforcing a destination brand for their area.

While implementing the marketing plan will improve Caye Caulker’s competitiveness as a major tourism destination, the focus of the marketing plan will be to position Caye Caulker as a unique destination in its own right: “A high-quality marine tourism destination with healthy ecosystems, friendly people, and a low-key island charm sustainably harnessed by a progressive, thriving and prosperous community”. The marketing plan will therefore provide the clarity and agreement needed to effectively market the area for future tourism development. By so doing, a “brand” for Caye Caulker which is collectively marketed will be developed.

3. *Integrate and promote digital marketing platforms to showcase Caye Caulker nationally and internationally.*

High costs of building and maintaining a web presence as well as limited skills and experience to effectively use information and communication technology have probably resulted in the minimal use of digital portals to adequately market Caye Caulker and its various sites and attractions. The LTC will partner with local digital marketing experts or companies to expand and improve the use of digital marketing platforms to showcase Caye Caulker. This will include designing and launching a Caye Caulker Destination website that has the right level of information and functionality and also has aesthetic appeal.

4. *Digital marketing training*

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.

5. *Re-engagement of the Marketing Committee*

The multi-stakeholder Marketing Committee that was once active will be re-activated as a sub-committee of the LTC. This will ensure that the marketing sub-committee will have full representation of all the relevant tourism sectors on the island. The core purpose of the marketing sub-committee would be to oversee the implementation of the strategic tourism marketing plan and the integration and promotion of digital marketing platforms to showcase Caye Caulker nationally and internationally. This will be done with the support of the BTB.

3.4 *Tourism Investment Project Ideas*

The main tourist thrust of Caye Caulker is that of a low-cost diving and sports-fishing destination with convenient access to the barrier reef. Caye Caulker is also a destination for water sports enthusiasts and leisure visitors that come to enjoy its laidback lifestyle. This section will discuss identification of priority infrastructure and needs for private sector engagement to improve the tourism product in Caye Caulker.⁷

⁷ Source: “Tourism Market Study and Identification of Investments for the Sustainable Tourism Program II in Belize” Draft Report (Manuel L. Knight, July 2015)

3.4.1 Identification of Priority Infrastructure

Table 6 contains investment project ideas (with broad cost projections) for improving the product that Caye Caulker will provide.

Table 6: Caye Caulker priority infrastructure proposals

Caye Caulker priority infrastructure proposals			
	Project Ideas	Description	Projected Cost (BZ\$) (Indicative)
1	Beach Reclamation	The enhanced public beach would have at least 400-500 feet of frontage on the sea in the Palapa Garden and “Playa del Nino” area. The beach reclamation works should follow proper environmental protection guidelines in line with an environmental compliance plan approved by the Department of the Environment. Space for bazaars and festivals (with adequate restroom facilities) should be provided to build up interest in the off-peak months and make the island more family-friendly.	\$500,000 ⁸
2	Nature Park	The nature park would be developed in the northern part of the island in an area straddling the CCFR and possibly private lands. The park will provide a range of recreational and wetland discovery activities such as canoeing and kayaking for mangrove exploration, bird walks, photo safaris, bicycle rentals and possibly glass-bottom boat touring. Specially designated areas for swimming, picnicking, and sandy trails for walking and bicycling would also be provided.	\$150,000
3	Improved Drainage System	Caye Caulker does not have a drainage system nor a sewage system. A drainage engineering study of the island will be conducted. Based on the results of this study, a drainage system plan (including implementation budget) will be developed. Improvement of the drainage system should be done before the improvement of streets and paths.	\$50,000 ⁹
4	Water Taxi Terminal	The water taxi terminal would be on the leeward side of the island and would replace the two water taxi docks on the windward side.	\$350,000 ¹⁰
5	Signage	Well-designed welcoming, directional (way-finding), and location signs within Caye Caulker to facilitate visitors during their stay.	\$25,000
6	Island Beautification Project	Installation of coloured permeable block pavement of sidewalks and pedestrian areas and installation of street furniture (such as tables, benches, monuments, signposts and flowerbeds).	\$100,000
7	Community Billboard or	A visitors’ center near the center of the village where the majority of tourists congregate. The center would provide information about excursion/tour options, dining options, accommodations,	\$50,000 ¹¹

⁸ Note: Indicative cost for beach reclamation is based on a budget approved by the BTB (\$400,000). An additional \$100,000 is hereby recommended to go towards development of public facilities (such as restrooms and changing rooms).

⁹ Note: This is the indicative cost for the engineering study only. Costs to improve the drainage system would be determined by the engineering study.

¹⁰ Note: This indicative cost for the Caye Caulker water taxi terminal is based on the cost of the San Pedro “Saca Chispas” terminal (~\$400,000).

¹¹ Note: The indicative cost for the information center is based on the cost to construct the Orange Walk Tourism Information Center.

	Information Center	water taxi schedules, and other relevant information useful to the tourist. A community billboard would be installed at or next to the center and will provide information about the various cultural and entertainment events taking place on the island (such as festivals and dances).	
8	Park and Sporting Complex in Bahia	What currently serves as the basketball court would be retrofitted to serve its original purpose – a park and sporting complex. Instead of just functioning as a basketball court, the location would also be enhanced to allow for cultural activities and other recreational activities by constructing a well-designed gazebo/stage. Restroom facilities would also be put in place, and the location would be beautified with potted plants, absorptive block pavement, benches, and the like.	\$50,000

3.4.2 Needs for Private Sector engagement

In the case of the public beach operation on Caye Caulker, because it involves different components such as foodservice, beach maintenance, café operation, and sports operations, the legal framework needs to be evaluated to design a set of privately-operated concessions that are well designed and are mutually supportive. The enhanced public beach would have at least 400-500 feet of frontage on the sea in the Palapa Garden and “Playa del Nino” area. The beach reclamation works should follow proper environmental protection guidelines in line with an environmental compliance plan approved by the Department of the Environment. Associated services that would need to be offered include: properly designed and strategically located public restrooms and showers, changing rooms, beach chairs and umbrellas, space for volleyball, Frisbee and other light sports, food vendors, a kiddies section, life guard surveillance and first aid. Yoga, Zumba and aerobics classes could also be offered and as such it would function as an open air health club. If space allows, one or two cafes could be given land leases on the fringe or arranged as sub concessions. At some times of the year small carnivals or festivals could be held to add cultural interest to the village’s life. This proposal is intended to enliven the stays especially of non-divers and fishermen visiting the island. The responses from the Exit Survey attest to the strong interest the tourists have in enjoying beaches and discovering local cuisine, and sampling the culture in different ways¹². The public restrooms, showers and changing rooms could be operated by a private sector entity or a non-profit concession holder so that they are well maintained at all times. This suggests that a fee will be charged for the use of those facilities. The village council would regulate the concessions under the relevant legal frameworks.

Another proposed enhancement is a nature park on the north island. Covering several acres on land and water, it would offer a much quieter experience in tone, have sandy paths and some boardwalks to stroll or cycle on, picnic tables and a wooden observation tower. It could also have a swimming and snorkeling area, and another with kayaking and canoe tours through the mangrove. Visitors could spend half a day of exercise in this peaceful, natural setting, quite unlike Caye Caulker. Since much of the land on the north island (south of the Caye Caulker Forest Reserve) is privately owned, a land use plan with delineation of properties and rights would be agreed to avoid incompatible development. In many countries the mixing of natural areas with privately owned ones has been accomplished to the benefit all land owners which is where the land use plan can be critical. However, it may be possible for this facility to be

¹² Source: Caye Caulker Exit Survey Findings, PDU, MTCCA

developed in the Caye Caulker Forest Reserve (CCFR). The Caye Caulker LTC has also proposed an expansion to the north end of the CCFR for nature trails and other visitor facilities to accommodate tourism. Observation points and designated rest/seating areas are also proposed on public land for the viewing of tarpon. A non-profit (such as Caye Caulker BTIA) or private entity could be awarded the concession(s) to operate one or more components of the proposed nature park. There is precedent in Belize for both of these possibilities. If this park is successful it might draw visitors on excursions from San Pedro as well.

3. 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 MTCA focal point collect quarterly updated objective summary/status reports (see Annex 5 – Quarterly Status Report Form) from the respective sector representatives on the LTC.
- The LTC Chairperson and the MTCA focal point ensures that all objectives have been accounted for.
- Include monitoring of TDDP implementation as a recurrent agenda item for LTC meetings; this can be done via quarterly reports to the MTCA.
- The LTC Chairperson and the MTCA focal point make note of unfinished objectives (shortfalls), needs for readjustments of outcomes and target dates (reforecasts), meetings to be called, etc., on a bi-monthly basis. This can be done using the Objectives, Responsibilities and Targets (ORT) form (see Annex 6 – Objective, Responsibilities and Targets (ORT) Report Form).
- The LTC Chairperson and the MTCA 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 planning sessions and a mid-term evaluation.
- Progress of TDDP implementation is to be evaluated at annual LTC Retreats. Such evaluation may need to be facilitated by an external consultant.

SECTION 3: STRATEGIC OBJECTIVES AND ACTIONS



Photo 4: Water Gliding, Caye Caulker

Note: The objectives are displayed in two tables – the first table shows the objectives and actions for 2016, while the second table lists the objectives and actions for 2017 to 2020. The first table therefore identifies the actions requiring immediate or urgent attention in the first year of TDDP implementation.

2016 Action Plan

Tactical Objectives for the 2016 period (prioritized)	Responsibility/ Partner Agency	Target Date
<i>Purpose: Highly improved standards and quality of tourism products and services in Caye Caulker</i>		
Strategic Objective #1: To improve the capacity & specialization of tour guides		
1. Develop and implement advanced tour guide training	CCBTIA, BTB, LTC	2016
2. Develop and conduct regular practicum sessions for tour guides	CCBTIA, BTB, LTC	Ongoing
3. Strengthen the institutional capacity of the CCTGA	CCTGA, BTB	2016
Strategic Objective #2: To improve tourism facilities and services at strategic areas on the island		
1. Improve tourism facilities on the island	CCVC, BTB, funding agencies	Starts in 2016
2. Improve the standards of tourism services at Caye Caulker	LTC, CCBTIA, BTB	Ongoing
3. Advocate for enforcement of regulations in partnership with the local and national authorities	LTC, CCVC, MTCA	Ongoing
4. Improve the visibility of the Police Department	Police Department (GOB)	Ongoing
5. Implement an island beautification project	CCVC, BTB	Starts in 2016
Strategic Objective #3: To improve and expand excursion and recreation options in Caye Caulker		
1. Enhancement of Mini Reserve and Visitors' Centre	CCBTIA, BTB	2016
2. Establish a Community Billboard or Information Center	CCVC, LTC, BTB, CCBTIA	2016
<i>Purpose: Expanded and responsible municipal & tourism infrastructural development at Caye Caulker</i>		
Strategic Objective #4: To build community awareness about the importance of culture and community		
1. Build the LTC's role in sensitizing the community about the importance of community	LTC	Starts in 2016
Strategic Objective #5: To advocate for responsible land use planning and development practices on and around the island		

1. Formalize the Local Tourism Committees as the lead tourism advisory entity within the MTCA	MTCA	2016
2. Establish the LTC as a multi-sectoral monitoring entity	MTCA	2016
3. Promote zoning and compliance of relevant laws and regulations	LTC, CCVC, CBA	Ongoing
4. Strengthen the local BTIA Chapter's capacity as a destination management agency	CCBTIA, BTB	Starts in 2016
<i>Purpose: Increased and sustained tourist arrivals and overnight stays in Caye Caulker</i>		
Strategic Objective #6: To implement multi-platform marketing strategies that promote Caye Caulker's tourism brand		
1. Participatory development and implementation of a strategic tourism marketing plan	LTC, CCBTIA, BTB	Starts in 2016
2. Re-engagement of the Marketing Committee	LTC, CCVC, BTB	2016

2017-2020 Action Plan

Tactical Objectives for the 2016 to 2020 period (prioritized)	Responsibility/ Partner Agency	Target Date
<i>Purpose: Highly improved standards and quality of tourism products and services in Caye Caulker</i>		
Strategic Objective #1: To improve the capacity & specialization of tour guides		
1. Develop and implement advanced tour guide training	CCBTIA, BTB, LTC	2018, 2020
2. Develop and conduct regular practicum sessions for tour guides	CCBTIA, BTB, LTC	Ongoing
3. Improve policing/compliance methods governing the work of tour guides	CCTGA, BTB	2017 and ongoing
Strategic Objective #2: To improve tourism facilities and services at strategic areas on the island		
1. Improve tourism facilities on the island	CCVC, BTB, funding agencies	2017-2019
2. Improve the standards of tourism services at Caye Caulker	LTC, CCBTIA, BTB	Ongoing
3. Advocate for enforcement of regulations in partnership with the local and national authorities	LTC, CCVC, MTCA	Ongoing
4. Improve the visibility of the Police Department	Police Department (GOB)	Ongoing
5. Implement an island beautification project	CCVC, BTB	2017
6. Improve the drainage system of the island	CCVC, GOB, funding agencies (e.g., SIF)	2017-2018
7. Establish permanent funding (contribution) scheme to maintain facilities	CCVC, LTC	2018
Strategic Objective #3: To improve and expand excursion and recreation options in Caye Caulker		
1. Develop alternative onshore and near shore attractions	LTC, CCBTIA, CCVC, BTB	2017-2018
2. Establish a bike trail and boardwalk at South Point Reserve	CCVC, LTC, BTB	2017
3. Development of park and sporting complex in Bahia	CCVC, GOB	2017
<i>Purpose: Expanded and responsible municipal & tourism infrastructural development at Caye Caulker</i>		
Strategic Objective #4: To build community awareness about the importance of culture and community		
1. Build community awareness of Caye Caulker's cultural heritage	LTC, NICH	2017 and ongoing
2. Build the LTC's role in sensitizing the community about the importance of community	LTC	Ongoing

Strategic Objective #5: To advocate for responsible land use planning and development practices on and around the island		
1. Promote zoning and compliance of relevant laws and regulations	LTC, CCVC, CBA	Ongoing
2. Strengthen the local BTIA Chapter's capacity as a destination management agency	CCBTIA, BTB	2017
3. Establish an awards/incentive program that recognizes businesses exemplifying both environmental and social corporate responsibility	LTC, BTB, CCBTIA	2017 and ongoing
<i>Purpose: Increased and sustained tourist arrivals and overnight stays in Caye Caulker</i>		
Strategic Objective #6: To implement multi-platform marketing strategies that promote Caye Caulker's tourism brand		
1. Participatory development and implementation of a strategic tourism marketing plan	LTC, CCBTIA, BTB	2017
2. Reinforce Caye Caulker's brand	BTB, CCBTIA	2017 and ongoing
3. Integrate and promote digital marketing platforms to showcase Caye Caulker nationally and internationally	LTC, CCBTIA, CCTGA	2017 and ongoing
4. Digital marketing training	BTB, CCBTIA	2017

SECTION 4: IMPLEMENTATION SCHEDULE



Photo 5: Stingrays, Shark Ray Alley

Tactical (prioritized)	Objectives	Year 1				Year 2				Year 3				Year 4				Year 5			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
<i>Purpose: Highly improved standards and quality of tourism products and services in Caye Caulker</i>																					
Strategic Objective #1: To improve the capacity & specialization of tour guides																					
4.	Develop and implement advanced tour guide training																				
5.	Develop and conduct regular practicum sessions for tour guides																				
6.	Strengthen the institutional capacity of the CCTGA																				
7.	Improve policing/compliance methods governing the work of tour guides																				
Strategic Objective #2: To improve tourism facilities and services at strategic areas on the island																					
6.	Improve tourism facilities on the island																				
7.	Improve the standards of tourism services at Caye Caulker																				
8.	Advocate for enforcement of regulations in partnership with the local and national authorities																				
9.	Improve the visibility of the Police Department																				
10.	Improve the drainage system of the island																				
11.	Implement an island beautification project																				
12.	Establish permanent funding (contribution) scheme to maintain facilities																				
Strategic Objective #3: To improve and expand excursion and recreation options in Caye Caulker																					
3.	Develop alternative onshore and near shore attractions																				
4.	Enhancement of Mini Reserve and Visitors' Centre																				

5. Establish a bike trail and boardwalk at South Point Reserve																				
6. Establish a Community Billboard or Information Center																				
7. Development of park and sporting complex in Bahia																				
<i>Purpose: Expanded and responsible municipal & tourism infrastructural development at Caye Caulker</i>																				
Strategic Objective #4: To build community awareness about the importance of culture and community																				
2. Build community awareness of Caye Caulker's cultural heritage																				
3. Build the LTC's role in sensitizing the community about the importance of community																				
Strategic Objective #5: To advocate for responsible land use planning and development practices on and around the island																				
5. Formalize the Local Tourism Committees as the lead tourism advisory entity within the MTCA																				
6. Establish the LTC as a multi-sectoral monitoring entity																				
7. Promote zoning and compliance of relevant laws and regulations																				
8. Strengthen the local BTIA Chapter's capacity as a destination management agency																				
9. Establish an awards/incentive program that recognizes businesses exemplifying both environmental and social corporate responsibility																				
<i>Purpose: Increased and sustained tourist arrivals and overnight stays in Caye Caulker</i>																				
Strategic Objective #6: To implement multi-platform marketing strategies that promote Caye Caulker's tourism brand																				

ANNEXES



Photo 6: Manatee, Caye Caulker

Annex 1 – LTC members and other stakeholders

Name	Organization
Ali Cansino	Belize Fisheries Department
Bert Pacheco	Scuba Sensation
Carla Gillett	MTCA
Carlos B. Ayala	Carlos Snorkeling Shop
Darren Cassan	Habanero Restaurant
Enelda Rosado	Caye Caulker Village Council
Ian Forte	CCTGA/LTC Chairperson
JoAnn McFarlane	Bonita's Bayside
Kevin Gonzalez	BTB
Mamoru Osada	BTB
Marcial Alamina III	Friends of Swallow Caye
Maria Vega	CCBTIA
Michael Joseph	Palmetto Accommodations
Nicholas Wade	C&N Gold Cart Rentals
Parnell Coc	Chasin Tails Fishing
Norman Benguche	Police Department
Samuel Kim	Caye Caulker Plaza Hotel
Stacy Badillo	CCBTIA
Terry Wright	MTCA
Wayne Miller	CCVC

Annex 2 – PEST Analysis Results

<p>Social</p>	<ul style="list-style-type: none"> • The island has lost its “friendliness” and welcoming attitude of villages – still there to a certain extent – being affected by the higher population density? • Poor standards of customer service among places of business • Businesses have lost the spirit of corporate social responsibility • Generational changes – different attitudes of the younger people; this has affected the level of cultural expression on the island • The drugs issue – the role of the “mainlanders” • The harassment of tourists and villagers (especially females) • Lack of local programming on mass media (TV, radio) – bombarded by American programming (the consumerism focus) • Behavior of tourists could be negative – e.g., public drinking <ul style="list-style-type: none"> ○ Local tourists’ behavior results in some businesses not keen on serving them – particularly during Easter, holidays, weekends • Health care service is inadequate – Only a clinic, one doctor and nurse, and one private doctor in place (providing minimal services) • insufficient Police presence
<p>Economic</p>	<ul style="list-style-type: none"> • Caye Caulker has high percentage of overnight market share but low percentage of per capita visitor spending – many are budget travelers <ul style="list-style-type: none"> ○ There are many places in Caye Caulker that are affordable. The lack of night life has encouraged visitors to stay in their hotel rooms ○ The openness and friendliness of the island’s local culture (e.g., carnivals, festivals) is not there • However, Europeans have started to visit with their families – opportunity? • The production cost in Caye Caulker is as high as everywhere else (but prices do not change) – this needs to be analyzed • There has not been a strong focus on quality and standards • The slowest months (September, October, November) affect CC’s economy • The social responsibility of businesses to promote Caye Caulker has been lost resulting in Caye Caulker not being promoted enough • The harassment of tourists and villagers (especially females) by mainlanders impacts business • Uneven playing field – local people trying to advance with local resources but expats/foreigners come in with higher/external resources – the regulatory agencies need to regulate better (e.g., inspections) <ul style="list-style-type: none"> ○ The high costs of opening a business – the high interest rates -- foreigners can borrow at their country of origin at much lower rates ○ Getting lower interest loans – e.g., from DFC – can still be very difficult • Planning process has been in place for over 30 years, but implementation is a challenge • Price war (price fixing) among tour operators ongoing (e.g. half-day, Swallow Caye and Hol Chan tours)
<p>Ecological</p>	<ul style="list-style-type: none"> • Beach erosion is a problem – most of the erosion is concentrated from the Split southward to the center of the island; Sand is being “artisanally” mined from the Split area – stopping this would stabilize the erosion

	<ul style="list-style-type: none"> • Beach erosion also from boat traffic • No sewage system – only individual septic tanks <ul style="list-style-type: none"> ○ There is ongoing disposal of untreated sewage into the mangrove areas/The Dump ○ The new Waste Transfer Station (near to completion) situated next to the airstrip will close The Dump and disposal of sewage will not be allowed there • The Belize Barrier Reef is under stress from insufficient unregulated/unmonitored activities (snorkeling, guiding, fishing, etc.) <ul style="list-style-type: none"> ○ No service exists for long-stay boats that anchor offshore in the bay -- and dumping their waste • Air quality impacts from boating also exists • Mangrove clearance exists • There is a Reverse Osmosis system on the back of the island – where does the waste water go? If at sea, what impacts could this be having? • The tap water often has a foul odor but still needs to be used <ul style="list-style-type: none"> ○ The well water is used for toilets and exist on a separate line from the BWS water for bathing • Climate change impacts are evident (e.g. extra heat, sea level rise, sargassum, etc.) • Caye Caulker Forest Reserve holds great potential for the island – land-based tourism and recreational activities (e.g. lagoon, birding, trails in littoral forest, camping, crocodile watching) – good alternative for raining and high-wind days.
<p>Political</p>	<ul style="list-style-type: none"> • Small population – voter base is small – lack of influence and small voice • More focus on San Pedro -- less on Caye Caulker • Divided community (regardless of the size) – individualism – the LTC is a positive way forward • Everyone needs tourism on this island -- all aspects of life on this island is now based on tourism <ul style="list-style-type: none"> ○ It is the hope that tourism could serve to bring all the sectors together driven by the LTC • Small population could be a plus in relation to working together – Caye Caulker often seen as independent thinking • Effects of the long-term political scenario (the after-effects of colonialism) -- has implications long term as it relates to the division of people • Neglected by Central Government in terms of support (village development) – Caye Caulker is not taken seriously • Caye Caulker is a village but operating on a town status – the use of bylaws for development (villages transitioning for a while can pass bylaws but only up to a point) – falls under the Village Councils Act • Central Building Authority (CBA) – zoning laws and building codes? Village Council rarely informed beforehand – governance issues – need to make zoning legal • CBA has a process they go through but not all developers go through this -- many times the damage is already done and results in a reactive approach rather than a proactive one • The politics of mangrove clearing (mangrove regulations) – low fines/penalties – insufficient communication among relevant authorities

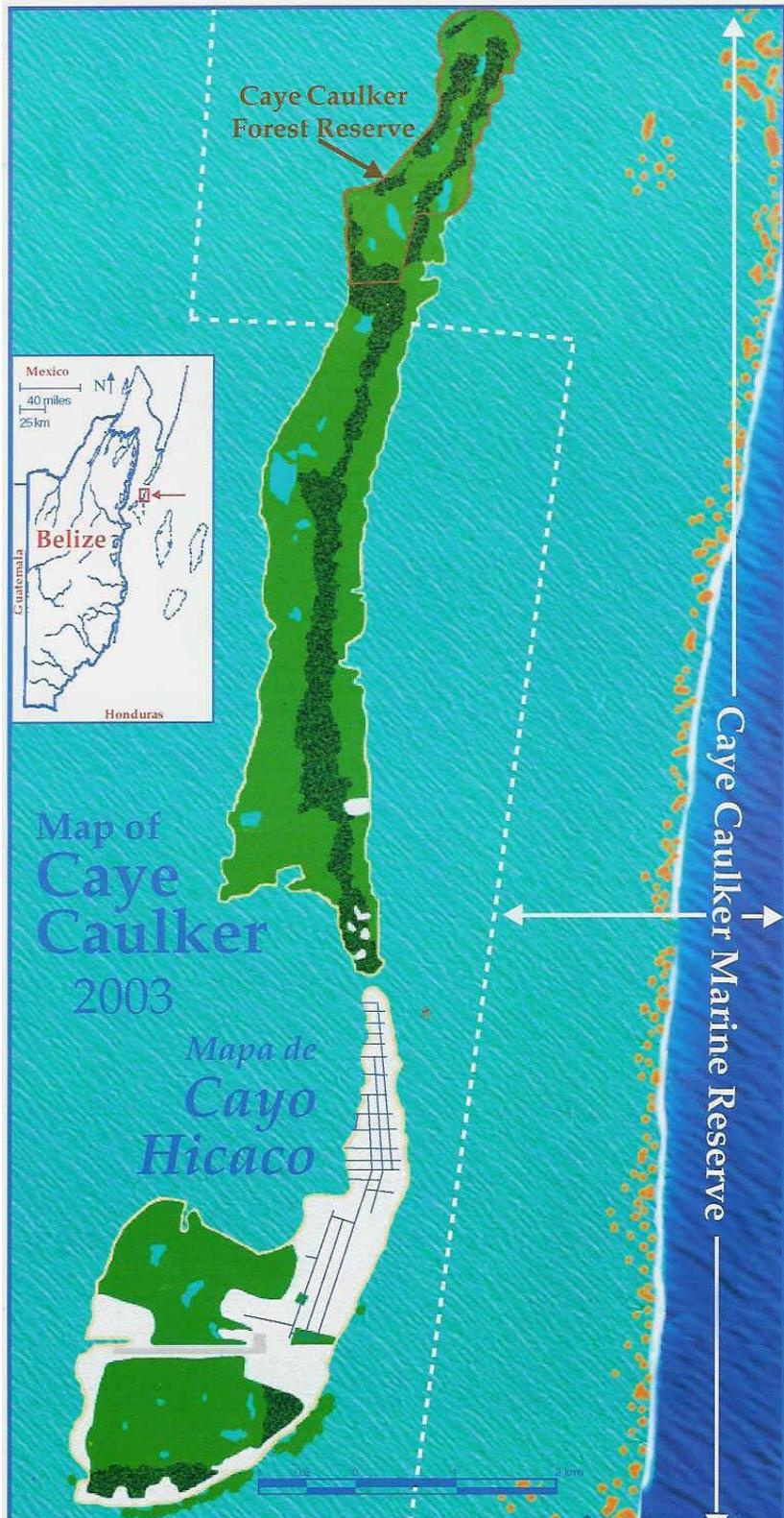
	<ul style="list-style-type: none"> ○ Cutting of mangroves commonplace although prohibited by law ○ Developers rather pay fine than to go through proper procedures ○ We need to look at this in the destination plans, the Master Plan and the CZM Plan ● CCVC has subdivided the island into areas to improve community support <ul style="list-style-type: none"> ○ CCBTIA and FOSC formally collaborating ○ Some long standing groups (BTIA and Friends of Swallow Caye) have signed agreements to work together. FAMRAC is defunct, although was supposed to be in charge of the management of the Forest Reserve ○ Other organizations exist as well <ul style="list-style-type: none"> ▪ CCTGA and NASIG ▪ PTA ▪ Citizen patrol ▪ Community Policing ○ The Tour Operator Association is inactive
<p>Technological</p>	<ul style="list-style-type: none"> ● No proper signage ● Need for a tourism information center ● Communications - internet service is weak ● Free up the energy sector ● Airstrip needs upgraded (air traffic control, safety, lighting, air traffic control, fencing, etc.) ● Need for a water taxi terminal on the leeward side of the island – a location has been identified

Annex 3 – SWOT Analysis Results

STRENGTHS	<ul style="list-style-type: none"> ■ LTC recognized by the CCVC ■ LTC is a dedicated group of people that are well known and well thought of ■ Moving toward a collective/cohesive voice for tourism ■ Committee is multi-sectoral ■ A lot of experience represented on the LTC ■ Mostly local people comprise the LTC ■ Possibility for LTC to be legislated as an advisory body ■ Mutual respect among current LTC members ■ Political partisanship does not affect the functions of the LTC 	OPPORTUNITIES	<ul style="list-style-type: none"> ■ Developing minimum standards for all sector businesses in CC would be a way to engage all businesses ■ The annual liquor license meeting may be a forum to keep all sectors engaged ■ Funding opportunities – e.g., Ministry of Rural Development for infrastructure development (streets and drains; sports complex); DAVCO project (community center); international opportunities, such as climate change funding; STP II support ■ Need just one or two major initiatives (e.g., the anti-foam packaging initiative) to happen for change (in mindset) to start to happen – expand to the whole concept of biodegradable food packaging
WEAKNESSES	<ul style="list-style-type: none"> ■ Failure of the LTC to engage the community – therefore, lack of community awareness, which contributes to lack of interest ■ Difficult to reach out to the different sector stakeholders viz communications – different sectors communicate differently ■ The different sectors are not well organized currently ■ Set community mindset – hard to change (Challenge) ■ Cut-throat competition among sectors (e.g., tour guides, tour operators, restaurants, hotels, etc.) – makes it difficult to be organized ■ Lack of engagement from Caye Caulker BTB representative with the community ■ No liaison currently between LTC members and the sectors 	THREATS	<ul style="list-style-type: none"> ■ Top-down decision making – lack of political support to community-led plans; risk that the MTCA pushes through things that are not compatible with the TDDP ■ The likelihood of petroleum exploration/extraction – the risk of oil spills ■ Lack of land use planning leads to inappropriate development ■ Lack of communication between national authorities and the CCVC ■ CC vulnerable to the impacts/effects of climate change ■ The impacts of Sargassum to the tourism industry ■ Ecological impacts may be resulting from dredging being done at the quarries on the leeward side of the island ■ Cut-throat competition among CC businesses

Annex 4 – Maps of Caye Caulker





Annex 7 – 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

Website: www.tourism.gov.bz

Facebook: www.facebook.com/motcbz