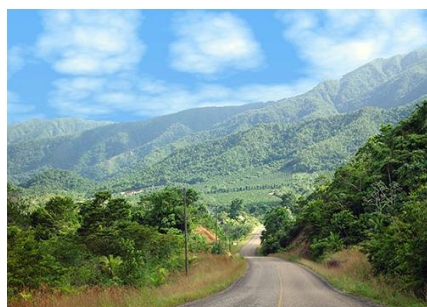
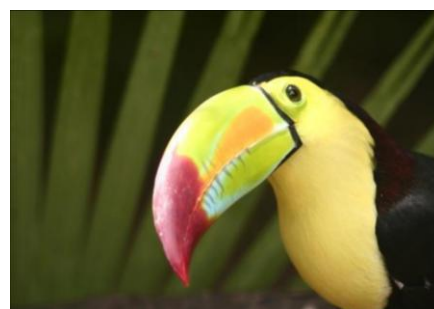


# NATIONAL SUSTAINABLE TOURISM MASTERPLAN FOR BELIZE 2030

## Executive Summary



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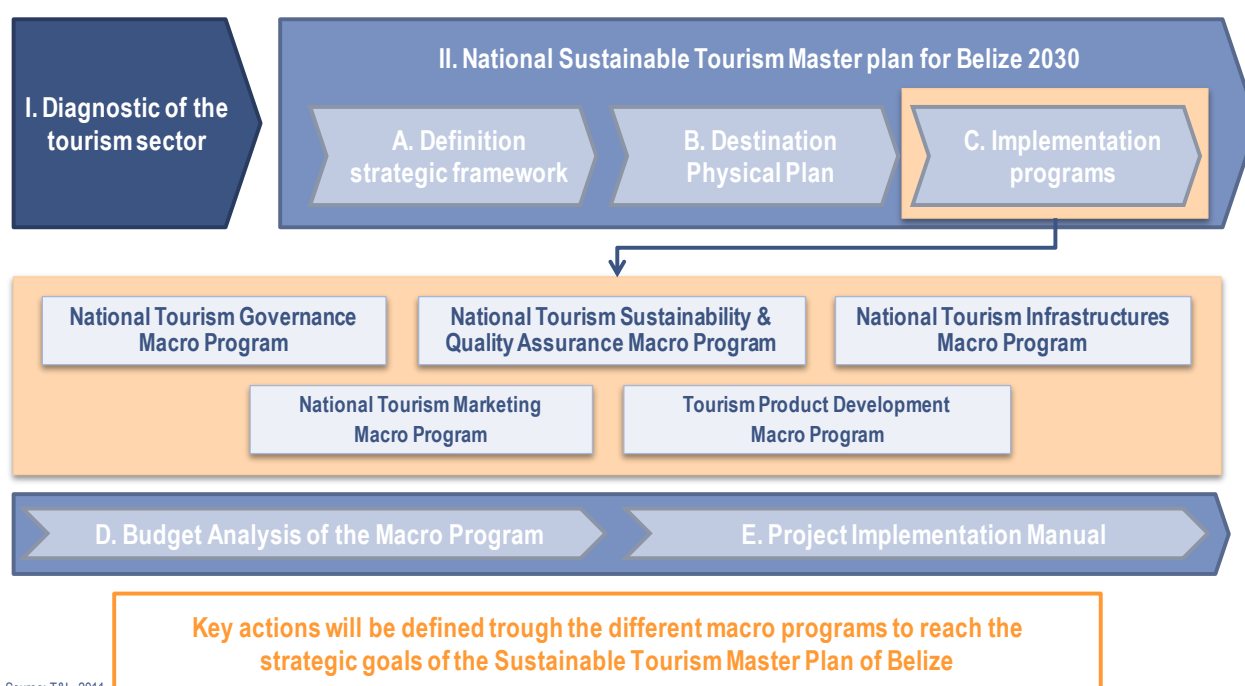
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## 1 Introduction

The present document highlights the strategic approach and subsequent action plan set forth in the National Sustainable Tourism Master Plan of Belize 2030 (NSTMP) whose expected implementation results will lead Belize into the future equipped with a dynamic, competitive, and sustainable tourism industry.

This executive summary explains what Belize tourism industry is like today, the objective Belize tourism situation for 2030 and the strategies and actions to reach that goal. It also gives a synthesis of the NSTMP structures and programs, and the strategic approaches that must guide the implementation plan. Finally, it provides a phasing approach and estimated preliminary budget calculation for the implementation of all programs and projects. In this regard, it is important to mention that the budget includes all activities, but this does not mean that all funding has to come from Government or even from the Ministry of Tourism and Civil Aviation/BTB. It provides a framework of magnitudes in order to organize activities for the active attraction of funding from all possible options, based on the particularities of each project.

The following graph portrays the components that comprises the NSTMP package and are subsequently described in the current executive summary:



Source: T&L, 2011

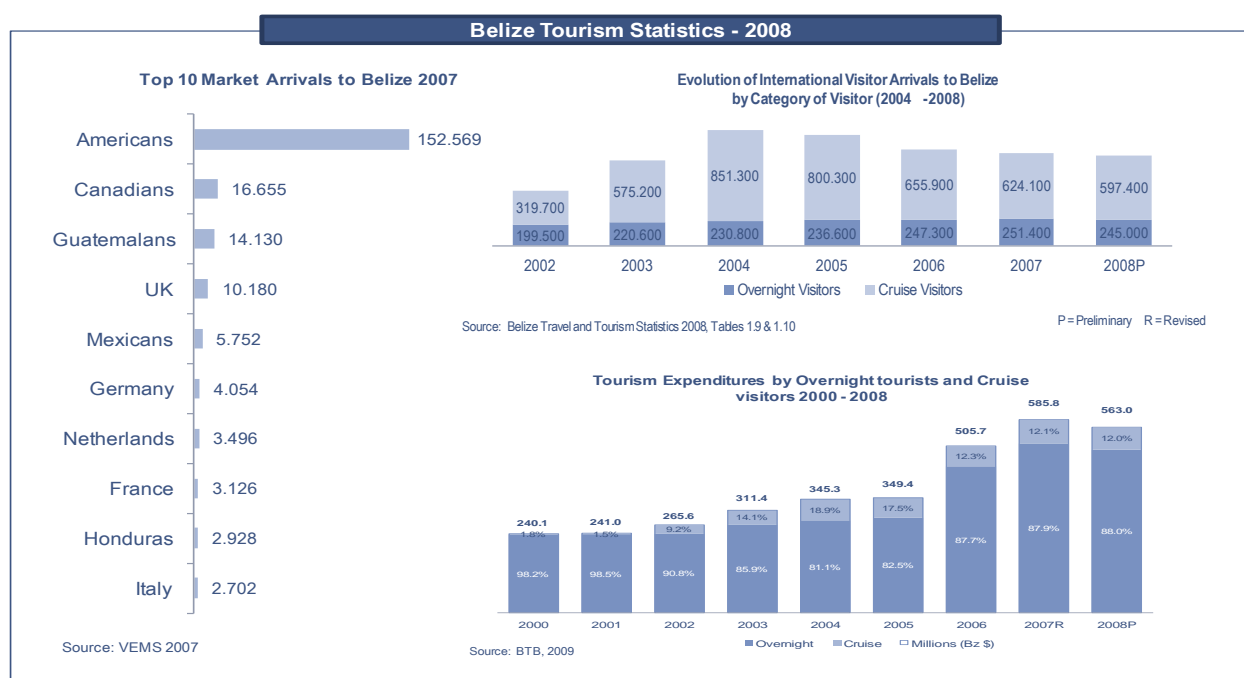
## 2 Belize Tourism Industry as it is today

With the momentum provided by the development of the National Sustainable Tourism Master Plan, the next two decades offer a unique opportunity for Belize to build upon its strengths and take advantage of the strategic opportunities presented. Its tourism attractiveness excels thanks to biodiversity, ecotourism and cultural sites, with specific sites of international interest having great potential for tourism development.

### Belize tourism in figures

The tourism industry is developing, with a wide range of tourism operators and employment of significant numbers of Belize's population. Moreover, the tourism sector in Belize is one of the most important for the country's economy. Few reliable estimates exist and they vary according to the source, however most converge in that tourism contributes anywhere from 18% to 25% of the total GDP, and accounts for about 28%<sup>1</sup> of total employment.

In 2008, Belize received 245,000 overnight arrivals and 597,000 cruise visitor arrivals contributing Bz\$563 million to the Belizean economy. About 85% of overnight arrivals consume tourism facilities, the other 15% stay with friends & family and own condos. The main market source continues to be the US market in a dominant position followed by the Canadian market, as shown in the graphic below:



### Belize tourism in value

Belize as a tourism destination is characterized by having excellent natural resources and strong cultural heritage that make it possible for eco-tourism, adventure and cultural tourism to flourish as its main tourism motivations, a fact that has enriched its attractiveness and motivated an increasing number of tourists.

**Belize hosts four “unique tourism assets”** with international recognition attracting tourists by themselves. These assets are the *Barrier Reef Reserve System*, the *Blue Hole Marine Reserve*

<sup>1</sup> World Travel & Tourism Economic Research – 2010 Travel & Tourism Economic Research for Belize



being unique of its characteristics in the world, the *Caracol Mayan site* with a highest level of competition but with special tourism interest and known as the most important of all Belizean Mayan sites and the *Chiquibul Caves System* hosting a great network of caves in the Chiquibul national park located in Cayo.

The rich historic background of the country is reflected in numerous heritage sites, mostly of Mayan origin, with great value for tourism. Additionally, many Mayan sites remain unexcavated and covered and are difficult to access by road resulting in an opportunity to further develop. Furthermore, the living cultures of Belize, hosting a diverse mixture of ethnic backgrounds (ie Kriol, Garifuna, Mestizo, Maya, and Mennonite) provide a unique opportunity to experience.

Additionally, its unique location offering Central American as well as the Caribbean Sea rich biodiversity is also a valuable advantage for tourism positioning. Moreover, its geography and size allows for easy access and tourism movement. And last but not least, its underdeveloped condition offers a great opportunity to foster tourism growth guided by sustainable development criteria.

However, there are numerous challenges to overcome and threats to mitigate. Belize faces many weaknesses, particularly in basic service provisions and infrastructures, technical skills of human resources pool, quality of tourism facilities, destination brand positioning, diversification of product offering and other socio-economic constraints. Additionally, misuse and unsustainable exploitation of natural and cultural resources poses a threat to the sustainable development of tourism growth.

The following summarizes main constraints identified during the diagnostic phase and highlights their negative impacts.

- ▶ **Poor level of accessibility on land**, mainly due to a small amount of paved roads leading to the tourism assets. Results in uneven distribution of tourism flow in the country, overcrowding in some sites and under utilization of others.
- ▶ **Poor level of accessibility by air**, mainly due to few international flight connections, mainly to Europe and Latin America.
- ▶ **Lack of sufficient and qualitative tourism services and facilities**, mainly due to poor training methods, low investment level of local private sector and few international hotel brands. Resulting in low visitor satisfaction and low competitiveness.
- ▶ **Scarce Belizean made handicrafts** and commercialization of traditional products and leisure activities.
- ▶ **Inadequate (natural & heritage) asset management**, mainly due to lack of awareness, knowledge and financial issues ultimately leading to degradation of the destination
- ▶ **Deficient of communication and promotion of tourism assets**, results in lack of international awareness of Belize as a tourism destination.
- ▶ **Insufficient waste disposal and sewage systems**, resulting in unhealthy conditions and visual pollution.
- ▶ **Lack of urban land planning and land use regulation**, resulting in haphazard and inadequate urban development, beach erosion, and land use conflict.
- ▶ **Lack of public awareness programmes**, leading to inappropriate usage of natural resources, such as the reef, national parks and rainforests
- ▶ **Need of integration of local communities into the Tourism Value Chain**, due to low awareness of tourism benefits and link to markets.

### 3 Belize Tourism looking ahead to 2030

The National Sustainable Tourism Master Plan aims to achieve a set of quantitative and qualitative specific objectives by 2030. The quantitative objectives are defined indicators of tourism intensity described in the vision 2030 in figures below. The qualitative objectives are defined as a desired market positioning or tourism vision, strategic market composition and destination development concepts.

These objectives have been based upon an in-depth analysis of the sector giving high priority to industry stakeholder consultation and tourism competitive potential of the country. They are considered achievable through the realization of the sustainable development strategic approaches and successful implementation of the framework designed by the NSTMP

#### *Vision 2030 in figures*

By 2030, the enhanced overnight destinations would result in doubling overnight tourism arrivals, reaching approximately 556,000 arrivals a year with an average length of stay of 10.6 days and spending US\$213 a day generating approximately 6 million overnight stays in tourism facilities. The optimized economic impact of the overnight tourism sector to the Belizean economy would increase 7.6 times and reach approximately US\$1.2 billion a year.

A controlled cruise tourism development is expected to level at an average compound growth rate of 3.8% in the same 20 year horizon and reaching 1.5 million cruise passengers visits per season. Per visit expenditure is expected to increase to about US\$90 per visit resulting in an optimized economic contribution to the Belizean economy of US\$134 million per cruise season.

Overnight Tourism	2008	2030	CAGR <sup>2</sup>	Multiplier Ratio
Arrivals (overnight tourists)	245,000	556,000	3.8%	2.3
Total Overnights	2.05 million	5.89 million	4.92%	2.8
ALOS	8.36	10.6		1.3
Average spending	US\$133/day	US\$213/day		1.6
Tourism Expenditure	US\$ 248 million	US\$1,255 million	7.65%	5.1

Cruise Tourism	2008	2030	CAGR	Multiplier Ratio
Cruise visitors	597,000 705,000 (2009)	1.5 million	3.68% from 2009	2.1 from 2009
Average spending	US\$57/visit	US\$90/visit		1.6
Tourism Expenditure	US\$ 34 million	US\$ 134 million	5.89%	4

<sup>2</sup> Compound annual growth rate

### *Vision 2030 in concept*

Belize, by 2030, will be an internationally recognized destination due to its unique, safe and high-added-value vacation experience that leaves those who visit with a longing to return and rediscover. The international market will come to know Belize's unique value proposition and will recognize its strategic location offering the best of Central American adventure and Caribbean flare. The following vision statement should become consolidated as a visual image of Belize in the international tourism market:



Source: T&L, 2011

### *Vision 2030 in markets*

Market growth will have been driven by the high value European source market discovering Belize, higher penetration of current source markets (USA and Canada), consolidated share of niche market segments and more dynamic cross-border movement. On the other hand, domestic travels should be promoted in order to make Belizeans feel that Belize is for the Belizeans too.

- ▶ **Few but strong source markets:** The European main source markets (such as German, French and English) will have been tapped and a growing stream of high value European tourist will be visiting Belize. Belizean traditional markets (USA and Canada) will be enhanced and consolidated in mid-high end segments. The main source markets for Belize are expected to be few but to generate high value.
- ▶ **Specialized in niche market segments:** Additional market growth will come from consolidated highly specialized market drivers such as cavers, divers, pocket cruisers, honeymooners, yachties & sailors, adventure seekers, among others. These segments will be attracting a more diversified target source market.
- ▶ **Dynamic cross-border movement:** Increasingly, intraregional travellers will be crossing border points to reach Belize as more and better connectivity is reached, with cross-product synergies to neighboring countries through such products as the Mayan Heritage Trail, nautical routes as well as a highly attractive shopping and entertainment offering. Intraregional travelers will be from both the international and regional markets.
- ▶ **Domestic travels:** domestic travels will increase, making the Belizean residents feel and experience the country as it is one of the tourism World Class destinations of their own.

### *Vision 2030 in destinations*

The implementation of the vision will lead to concentrating on mid/ high tourism facilities and segments, as well as on mid/ low density infrastructure developments. When it comes down to the most visited or tourism developed areas the development strategies would be as follows:

BELIZE CITY: Urban renovation

SAN IGNACIO: Promote tourism growth

PLACENCIA PENINSULA: Contain development and consolidate

STANN CREEK: New development

AMBERGRIS CAYE: Contain development and consolidate

NORTHERN BELIZE: Promote tourism growth

SOUTHERN BELIZE: Promote tourism growth

BELIZE REEF: Contain development and consolidate

The reference densities vary, ranging generally from level 1 (low) up to level 3 (mid). Level 0 (none) is also part of the proposed reference density of this plan, including all the areas where there is not any proposed intervention or growth. Level 4 (high) has been discarded as being rare in the country and considered inappropriate for the quality standards and the long term benefits for Belize. Predominant densities countrywide are 1 and 2, as these compose most of the humanized landscape in the country. As for level 3, it is only applied to very specific dense areas.

The hotel sector is expected to build 6,868 new hotel rooms by 2030 totaling 13,754 hotel rooms in order support the expected tourism overnight growth. From 2011 to 2020 37% of the new rooms would be built and 63.4% would be built between 2020 and 2030.

In general terms the plan tries to obtain a better balance developing all the tourism destinations according to the potentials of the different product offering. Belize will have seven thriving unique tourism destinations that together converge in a cohesive offering to make Belize a distinctive and highly competitive destination:

- ▶ **Western Belize:** San Ignacio city will be a demand driver, itself hosting a state-of-the-art welcome center, National Archeological Museum and charming village setting. The surrounding areas will have numerous nature and heritage trail systems and conceptualized adventure activities and facilities, nurtured by demand driven from high profile attractions such as Caracol and ATM cave systems.
- ▶ **South Eastern Coast Belize:** This distinctive destination will be hosting a chain of mid to low density sun & beach resorts, a chain of charming villages such as Placencia, Hopkins and Dangriga along with pristine and attractive beaches. This area will host mid-high end markets drawn by sun & beach, marine life and rainforest motivations; as well as it will become the main hub for nautical tourism development and the first to attract the pocket cruise market.
- ▶ **Northern Islands:** In Ambergris Caye, San Pedro will be regarded as a charming and attractive destination including a vibrant town with a walkable and attractive waterfront experience where beaches able to be enjoyed and unobstructed water scenery. Caye Caulker will continue to offer low-key charm along with attractive beaches and a cultural offering. Both destinations will provide a mainly nature-based niche product as well as nautical and sun&beach in second rank.
- ▶ **Central Coast Belize:** Will be dominated by a vibrant, urban tourism based in Belize City with a combination of preserved colonial-heritage architecture and modern entertainment facilities. It will host brand-name hotels as well as traditional style boutique hotels, for a growing

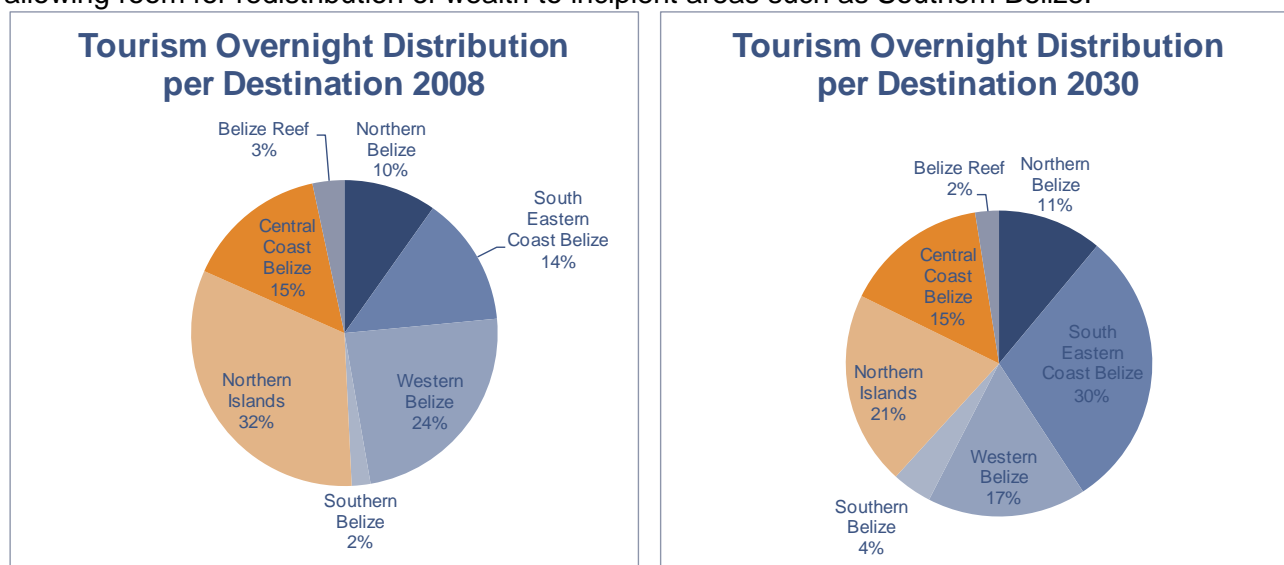


## National Sustainable Tourism Master Plan of Belize • Executive Summary

overnight tourism market and various facilities for cruisers and yachts and sailing clubs. It will be the main hub for conventional cruise arrivals that will benefit from Belize's City cultural offering as well as sourcing nature based tourism motivations and links to other destinations.

- ▶ **Northern Belize:** In this region we will find easy access to a prosperous Corozal town hosting a mid-high end Leisure & Entertainment center. Additionally, Orange Walk district will be benefiting from rural tourism activities and the integrated development of Mayan Heritage sites.
  - **Corozal:** Will be established as a mid-to-high shopping and entertainment destination as it will have fully developed an attractive open-air mid-high end shopping center hosting well-known brands, restaurants, cafes, bars and entertainment facilities such as casinos, theaters, and bowling alleys, among others. The area will have good access by land, boat and border crossings. As a secondary motivation it will host cultural and nature tourism product offering such as Shipstern Nature Reserve, Corozal Bay, Sarteneja and the manatees.
  - **Orange Walk:** The destination will be hosting diversified cultural heritage, living traditions and nature based eco-tourism products with high involvement of local rural communities. It will cater to a well managed cruise visitors market while establishing a growing overnight sector.
- ▶ **Southern Belize:** This area will become highly attractive to hard adventure travelers and eco-travelers for its unspoiled nature allure, conceptualized adventure travel sports activities and facilities, community tourism attractions. In a second order it will develop cultural tourism heritage and living culture while integrating local rural communities. In another level it will be a sun & beach and nautical tourism destination for those attracted to more secluded area.
- ▶ **Belize Reef:** This unique chain of reef islands will be renowned internationally for its world heritage status and will be regarded by visitors as a pristine and well-preserved destination. It will cater mainly to day visitors and will have second order niche markets hosting exclusive sun & beach low density resorts and nautical tourism facilities.

The distribution of overnights from 2008 to 2030 will have shifted as new destinations emerge relieving pressure from current highly-concentrated tourism areas such as Ambergris Caye and allowing room for redistribution of wealth to incipient areas such as Southern Belize.



Source: 2008 BTB statistics, projections 2030 T&L, 2011

## 4 Strategy to reach 2030 Vision

The strategic goals that Belize aims to achieve through the implementation of the NSTMP are based on Belize's strengths and weaknesses and are selected to mitigate constraints as well as to take advantage of Belize's opportunities. To achieve this, the goals which the master plan aims to achieve in the period from 2012 to 2030 are structured into the following four groups:

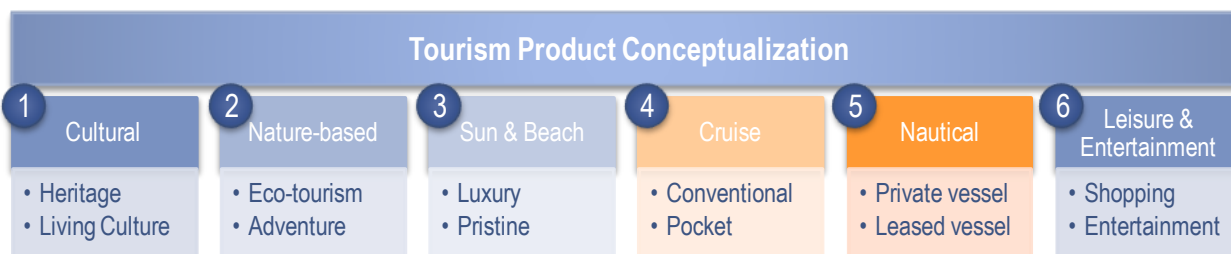


A set of specific strategic approaches has been defined with the aim of reaching the above mentioned goals that will ultimately translate into the previously defined vision or specific objective. The strategic approaches are followed throughout the entire implementation programs of the master plan as follows:

### 4.1 Strategy 1: Product development (Optimization Goal)

The first approach is to structure the tourism offering into a diversified product portfolio that maximizes tourism asset potential that meets the international tourism market expectations while minimizing environmental footprint while supporting cultural heritage, and local community development. Managing a tourism product portfolio will make possible the effective allocation of resources based on key objectives such as target markets; the balance of pipeline demand and pipeline resources available (such as priority criteria to channel economic resources); and strategic alliances within the industry to support tourism development that crosses political regional divisions. Additionally, it provides a framework that allows for sustainable development planning as it becomes more and more of a competitive advantage to consider sustainability aspects early on in the product development process.

The NTSMP has identified that Belize has strong potential to become a destination offering six main types of tourism experiences. These tourism experiences are umbrella product concepts that encompass numerous activity based products and niche segments linked by an overriding theme, resource, or target audience. Some of these products are already commercialized in Belize; however, all of them need to be further structured in order to enrich the tourist experience and enhance product diversification so as to meet international tourism market standards. The proposed product portfolio is composed of the following product concepts:



- **Nature-based Tourism** organizes Belize's ecotourism and adventure tourism products into a system of themed natural and man-made nature-based concepts structured into integrated recreational ecotourism and adventure sites and centers. In addition, it designs diverse nature-based themed routes and trails, such as the National Nature Tourism Trail System and

a National Caving Trail System, catering to the interests and needs of different niche segments. Unique Natural tourism assets, such as the barrier reef, blue hole and ATM will be commercialized under well managed sustainable development guidelines

- ▶ The **Cultural Tourism** product concept focuses on the development of cultural heritage and living culture sub-products. Its flagship creation is the development of a National Museum of Anthropology that will be strategically located in San Ignacio town. It defines the integral development of Mayan Heritage sites as a homogeneous tourism concept for all Mayan archaeological sites. Additionally it focuses on the creation of a chain of enchanting villages with a charming Belizean style appeal, rural tourism sites and routes and seasonal tourism attractions such as traditional markets, festivals and themed programs.
- ▶ **Sun & Beach Tourism** proposes the integrated development of sun & beach resort areas, pristine beaches and waterfront experiences in strategic locations on the coast of Belize and on reef islands, namely South Eastern Coast, Southern Coast, Northern Islands and reef islands.
- ▶ **Cruise Tourism** aims to structure Belize city and surrounding destination tourism assets as a structured and well managed set of attractive facilities and sites, such as Belize city waterfront experience and embellishment of Belize city colonial heritage neighborhoods, with an interactive welcome center in the Fort George area. Additionally, it will introduce the pocket cruise model as a viable option for cruise visits to the Southern Coast of Belize.
- ▶ **Nautical Tourism** structures a system of marinas, ports and services aimed at attracting tourists journeying in vessels (yachts, sail boats, boats, charter boats) across the Caribbean to come to Belize. Additionally, it aims to support the creation of yacht and sail clubs that link with international clubs and attract loyal customers.
- ▶ The **Leisure and Entertainment** concept is associated with a mid to high shopping and entertainment destination as it will have fully developed an attractive open-air mid-high end shopping center hosting brand names, restaurants, cafes, bars and entertainment facilities. The target area of development is Northern Belize, which is envisioned to be highly accessible by land, boat and border crossings. In a second order the concept is to be adapted and implemented in Belize City and San Pedro.

#### **4.2 Strategy 2: Integrated destination development (Competitiveness & Sustainability Goal)**

Following the product portfolio, the second approach is to focus on the integrated development of prioritized destinations and/or sites. The reasoning for this is to fully focus on creating the entire value chain for a product (which is based on visitors' main motivation for coming to Belize), creating experiences in a particular destination/site and therefore maximizing return on investment and multiplier effect. This approach will allow better management of the risk of running out of resources and being left with an offering of multiple unfinished products. This approach deems it safer to complete and maximize results of high priority projects and then proceed to second priority projects.

Additionally, through the creation of a destination planning integrated development framework, sustainability risks can be further mitigated by designating appropriate density models and appropriate safeguarding mechanisms that take into account social, environmental and economic aspects.

#### **4.3 Strategy 3: Experiential quality enhancement (Competitiveness Goal)**

As a fundamental and transversal approach, the Master plan focuses on the quality of service delivery and the creation of spaces that will enhance the value of tourism experiences in Belize.

The goal is to increase visitor satisfaction and confidence in Belize as a tourist destination that will ultimately result in increased customer loyalty and competitive positioning.

- ▶ **The hosting experience:** This starts from the notion that the ‘first impression is always the last impression’ to focus on enhancing the direct customer service experience. Therefore, the key is in building a professional and friendly hospitality human resources pool.
- ▶ **The visual context:** The quality of environmental conditions can either make the visitor experience superior or inferior. Therefore a consistent and strong focus is placed on enhancing the quality of the visual context in destinations and sites ranging from infrastructural projects such as the embellishment of villages and towns, to improving road conditions and signage, to awareness campaigns for garbage pickup. Furthermore, the plan will provide a set of land use and building guidelines to be applied to different destinations, according to their character and adapted to Belize styles.
- ▶ **The comfort of feeling safe:** An important part of the hierarchy of needs is the basic human need to feel safe and secure. If the destination does not fulfill this need, tourists may not fully enjoy their experiences in Belize. Therefore, considerable effort will be concentrated on enforcing codes, increasing security surveillance and emergency response, increasing minimum safety standards in the industry, enhancing safety of infrastructure and maintenance.

#### **4.4 Strategy 4: Empowerment of Stakeholders (Leadership & Optimization Goal)**

At the strategic level, stakeholder participation and channeling of benefits is key in order to reach long term sustainability and maximum economic profitability for the tourism sector. Keeping industry stakeholders aligned and cooperating will increase the chances of project implementation success, ensure targeted prioritization and maximum generation of local economic growth.

- ▶ **Stakeholder participation:** across all levels, local industry stakeholder participation is encouraged, from product development, to branding, new licensing requirements, and total quality management of sites, among all other industry development activities.
- ▶ **Maximum generation of local benefits:** empowerment and support of local SME development is encouraged and considered an essential element of integral development of destinations and sites; and an effort to find mechanisms to link tourism activity to poverty alleviation.

#### **4.5 Strategy 5: Proactive solution to funding sources (Leadership & Sustainability Goal)**

The final approach is a proactive mechanism of finding funding solutions for all levels of industry development. In the Belizean context where resources are limited, along with the initial approach of prioritization and concentration of efforts there needs to be in parallel a proactive search for funding sources. The proposed approach is to:

- ▶ **Find self-funding tourism development solutions:** Creating a National Sustainable Tourism Trust Fund whose main mission is to strategically channel tourism-industry-generated income into investments that will lead to the growth of the tourism sector. In addition, it will plan and design tourism destination development and proactively search for funding sources and investment partnership schemes.
- ▶ **Proactive search for investment partners:** Furthermore, in all programs and projects there encouragement is to be given to proactive generation of innovative funding solutions through strategic partnership schemes and aggressive searching for potential investors.

## 5 Implementation Programs at a glance

Each macro program is guided by the strategic approaches on achieving particular objectives of the 2030 vision that will lead to attainment the NSTMP goals. The macro programs formulate the actions that should be implemented in the destination structured into programs with subsequent subprograms and projects. Each macro program focuses on the core components of the Belizean tourism sector. The master plan's areas of focus are:

1. Tourism Governance
2. Tourism Sustainability and Quality Assurance
3. Tourism Infrastructures
4. Tourism Marketing
5. Tourism Product development

This structure of the master plan was chosen in order to:

1. Provide four umbrella macro programs (governance, sustainability and quality assurance, infrastructures, marketing) and one integral macro program (consisting of six tourism product programs) including transversal development projects. This structure will assure (even in case of reduced financing resources) the development of the tourism products and its specifics required in terms of governance, sustainability, quality assurance, infrastructure and marketing.
2. Develop and deliver manuals for specific development leaders and implementers. E.g. the macro program for tourism marketing should be implemented and lead by BTB, the product development macro program by BTB's product managers, and the tourism governance macro program should be implemented by MTCAC in cooperation with BTB.
3. Assure tourism sustainable development by including and partnering with different institutions and executors to implement and secure stakeholders support to develop programs and projects.

As far as the structure of the Product Development Macro-program, it will allow dissection of the product development approach and ease Product manager understanding of the different components to address in product development and with what actors/stakeholders they need to interact with to develop each core area. In the case of reduced budget where umbrella programs cannot be devised, sub-programs for priority products can be developed separately. Finally, it is designed to reach competitiveness in tourism product development sooner in the case of budget constraints. If there are restrains in the budget, resources can continue to be allocated in priority product business development to continue tourism growth

The tasks of each of these subprograms are clearly defined in the NSTMP as implementable projects, scheduled, budgeted and key players defined. In the subsequent pages a summary of the description of the program, its tourism 2030 vision, lead stakeholders, key objectives and description of the sub-programs are outlined.



## 5.1 Governance and Institutional Strengthening

### Description

The National Tourism Governance Macro Program comprises of programs directed at raising the quality standards of the tourism service offering in order to reach international market demand standards and assure sustainable development of tourism economic resources.

There are four programs described:

1. Global governance and Management
2. Tourism Policy
3. Tourism Satellite Account
4. Tourism Safety and Security

**The global governance and management program** countenances the need to launch a process to coordinate all the players who have any kind of effect on Tourism, something to be done through the design of a Global Governance System for the management of tourism at a country level.

**The tourism policy program** develops crucial tools for Lobbying and partnering, Regulatory and financial instruments, and Public-Private Partnership models.

**The tourism satellite account (TSA) program** develops Belize's TSA which will be the reference for organizing the system of tourism statistics, and the scope of the action plan is to define the programs that have to be undertaken to set up a TSA on a regular year base accounting system.

**The tourism safety and security program** addresses the need to protect visitor wellbeing by tourism proactive policing and appropriate response mechanisms. Ultimately it aims at increasing the perception that Belize is a safe destination in the international market.

### Vision 2030

- ▶ Government will foster a positive environment for the tourism sector and meaningful local participation in the sector.
- ▶ The tourism sector planning and management will be based on partnerships and collaboration; development of the tourism sector will be market-driven; all tourism activity will be designed to improve the quality of life enjoyed by Belize's citizens.
- ▶ The sector will benefit from a revenue stream of sustainable funds for promoting productive infrastructure investment, growth in product development, and encouraging better management of tourism resources.
- ▶ Policies and policy instruments that govern the tourism industry in Belize set clear and consistent goals for the future of Belize tourism.
- ▶ The principal of their design is to improve the quality of life of the population, finding the balance between catering to the needs of overnight tourists and cruise passengers, the fostering of a positive enabling environment for the industry, a strong local participation and that planning and management are based on partnership and collaboration agreements. Ultimately, policies and policy instruments lead towards a sustainable tourism progress.
- ▶ By 2030, Belize will have set up a statistical framework for the main tourism characteristic activities, for the main tourism demands that will be used as Marketing Intelligence System and to share data, mechanisms and information especially to further strategically monitor and develop Belize's tourism industry.

- ▶ By 2030, Belize will have developed and will be implementing a National Tourism Safety and Security Plan which will aim to structure and enhance the safety and security issues in Belize in order to position itself as a safe tourism destination.
- ▶ Additionally, it will count with a National Tourism Disaster and Crisis Management Plan that will aim to aid the tourism sector in mitigating, responding, and recovering from a crisis.

### Lead stakeholder

- ▶ All three organizations (BTB, NSTTF<sup>3</sup> and BELTRAIDE) should be closely linked as the main stakeholders leading the different activities towards a successful tourism development. A synthesis of the issues each of them should be responsible of are:
  - **BTB:** marketing/ product development/ quality development
  - **NSTTF:** master planning/ partnership development/ tourism works coordination
  - **BELTRAIDE:** investment promotion and business development
- ▶ The MTCAC is responsible for revising and amending current policies and deriving needed policies for the support of tourism product development.
- ▶ The lead responsible to develop the TSA program will be the Statistical Institute of Belize (SIB) with support from the BTB research and statistics team.
- ▶ MTCAC and the Police Department –TPU would be responsible develop strategies and programs to enhance the visitor's safety and security at the destinations, at sites and to develop communication/awareness programs specially dedicated to visitors.
- ▶ The MTCAC should lead the formation of the National Disaster & Crisis Management Committee along with lead stakeholders of the industry

### Objectives

- ▶ To increase tourism GDP
- ▶ To increase competitiveness of the tourism sector
- ▶ To increase investment in tourism productive infrastructure
- ▶ To increase Foreign Direct Investment (FDI) and hotel development
- ▶ To boost local economic development through tourism income
- ▶ To reinforce the development of tourism activity and increase foreign currency revenue originating in tourism activity
- ▶ To foster and coordinate the participation of the private sector carrying out joint actions
- ▶ To plan the development of the destinations and regulate the subsectors
- ▶ To support the modernization and innovation of the tourist supply (companies, products, facilities, etc.)
- ▶ To aid the industry in decision making through the availability of reliable and relevant statistical information
- ▶ To prevent crime and visitor victimization
- ▶ To reduce the impact of natural disaster and industry crisis
- ▶ To increase visitor confidence in Belize as a safe and secure tourism destination

<sup>3</sup> National Sustainable Tourism Trust Fund

## Program summary

Sub-programs description
<b>Global governance and management</b> <ul style="list-style-type: none"> <li>▶ <b>Sub-program for Tourism governance</b> structures at national and regional levels aims to foster a well planned and represented tourism sector by securing political support, strengthening decision making level representation and encouraging regional integration in order attain sustainable tourism growth. The ultimate goal is to create <i>Ministerial Council</i> chaired by the Prime Minister where key ministerial bodies would converge to support tourism development.</li> <li>▶ <b>Sub program for Strengthening the Management Structure for Tourism Development</b> creates a functional structure at the Belize Tourism Board that would support the Product Development approach, define core BTB additional functions, and create a fund raising position.</li> <li>▶ <b>Create a National Sustainable Tourism Development Trust Fund</b> to promote investment, growth and development in the tourism sector, encouraging better management of tourism resources, while supporting The National Sustainable Tourism Master Planning.</li> <li>▶ <b>Sub-program for Strengthening of Investment attraction and tourism SME development</b> strives to create a sound and competitive investment climate, enhance foreign investment promotional and facilitation activities and encourage professionalization of tourism SME local community</li> </ul>
<b>Tourism Policy</b> <ul style="list-style-type: none"> <li>▶ <b>Lobbying and partnering tools</b> as a crucial instrument to place tourism policy as a main national policy of Belize.</li> <li>▶ <b>Regulatory instruments for creating a legal framework</b> addressed to strengthen capacity and scope of action of Belizean tourism stakeholders.</li> <li>▶ <b>Financial instruments</b> as different economic devices aimed at providing financial support to public and/ or private initiative in the tourism industry in general and hence strengthening stakeholder capacity from an economic point of view.</li> <li>▶ <b>Public-Private Partnership models</b> in order to develop a portfolio of projects and initiatives where public-private partnerships are crucial for success in Belize's tourism development.</li> </ul>
<b>Program for Tourism Satellite Account</b> <ul style="list-style-type: none"> <li>▶ <b>The subprogram for TSA Tourism Activities Production Estimates</b> sets up a statistical framework for the main tourism characteristic activities. The tourism statistical system is part of a major quantitative effort addressed to national accounts compilation, but it has to be worked out with specific statistical tools</li> <li>▶ <b>The subprogram for Accounting and Tourism Demand Estimates</b> sets up a statistical framework for the main tourism demands. International tourism expenditure is only estimated for receptive tourism, and getting a grand total for daily expenses.</li> </ul>
<b>Tourism Safety and Security</b> <ul style="list-style-type: none"> <li>▶ <b>Sub-program for Tourism Proactive Policing</b> plans to proactively address surveillance and response mechanism through the creation of a <i>National Tourism Safety and Security Plan</i>.</li> <li>▶ <b>The Sub-program for Visitor Safety Awareness and Support Services</b> creates the appropriate channels to aiding and supporting tourists in the event of victimization and emergency situation. Additionally, the program promotes the creation of the <i>National Tourism Disaster and Crisis Management Committee (TDCMC)</i> with the goal of reducing losses related to natural disasters and other shocks to the industry by allocating resources to increase disaster resilience, cooperation in evacuation procedures and business continuity planning.</li> </ul>

## 5.2 Tourism Sustainability and Quality Assurance

### Description

The Sustainability and Quality Assurance Macro Program comprises of programs directed at raising the quality standards of the tourism service offering in order to reach international market demand standards and assure sustainable development of tourism economic resources.

There are three programs described:

1. Standards and quality management
2. Training and capacity building
3. Sustainable tourism development

The **Standard and quality management** section aims to raise the bar in minimum standard of tourism service delivery by increasing tour guide and tour operator licensing minimum requirements as a short term goal. In a second phase, and a long term approach, to raising quality standards it programs for an Integrated Tourism Quality Management systems where all stakeholders (public, private, civil society) participate in continuous quality improvements to the sector.

The **training and capacity building program** responds to the need of professionalizing the tourism human resources by addressing the quality of training and degree programs available in Belize. As a means of a long term solutions it envisions the creation of Hospitality Polytechnic Institute as a center of excellence for tourism hospitality training and tourism sustainable development research.

The **sustainable development program** provides the framework that will ensure the NSTMP maintains a balance of three pillars of sustainable development: social accountability, environmental conservation and economic prosperity. The program proposes mechanisms to address resource management and appropriate land use allocation while maintaining social and environmental safeguards and finding pro-poor mechanisms to link vulnerable groups to the tourism economic value chain.

### Vision 2030

- ▶ Offer tourism services and facilities that are compliant with national and international quality standards attracting a mid/high-end clientele
- ▶ Developed excellence in its training and capacity building institutions providing diverse courses training meeting the needs and requirements of the tourism industry.
- ▶ The tourism industry growth will most efficiently and effectively harness the cultural, environmental and socio-economic benefits the tourism has the potential to provide.

### Lead stakeholder

MTCAC should develop the standard and quality policies and regulations in conjunction with the local tourism stakeholders while BTB – Sustainability Quality Assurance department undertakes the executive task of enforcing quality standards and the operational licensing. Together with the local tourism industry, local NGO and community/municipality institutions, inclusion mechanisms and solutions can be recognized.

### Objectives

- ▶ To improved visitor satisfaction in services delivery
- ▶ To increase Belize's tourism product offering competitiveness

- ▶ To position Belize as a World Class destination in integrated quality management
- ▶ To enhance local income generation through tourism income
- ▶ To secure sustainable planning and management of tourism resources
- ▶ To prevent land use conflict
- ▶ To alleviate poverty by effectively linking to the tourism value chain economic activities

### Program summary

Programs & Sub-programs description
<b>Tourism standards and quality management Program</b> <p>The program suggests a participatory approach to finding common ground solutions that improve tourist satisfaction ratings and customer loyalty without hindering the economic growth potential of tourism business. The program consists of the following sub-programs:</p> <ul style="list-style-type: none"> <li>▶ <b>Sub-program for Tourism Operational standards and licensing</b> will devise new tour guide licensing categories and requirements, create tourism operational guidelines minimum standards and revise current licensing requirements. The program aims to increase income generating potential of the tourism sector through improving overall service standards, legislation mechanisms and support services.</li> <li>▶ <b>Sub-program for Tourism Integrated Quality Management (IQM) System and Certification</b> is a long-term approach for continuous improvement of service quality delivery and is subject to constant monitoring and multi-stakeholder cooperation and commitment in finding and implementing solutions which will raise the bar, standardize and regulate tourism operations service delivery.</li> </ul>
<b>Tourism Training and Capacity Building Program</b> <p>The Program addresses the gap in qualified tourism human resources through the revision of vocational training and tourism management curriculums and institutions, revision of tour guide training accreditation programs and the creation of a centre of excellence in tourism training and hospitality standards. The program consists of following sub-programs:</p> <ul style="list-style-type: none"> <li>▶ <b>Subprogram for Hospitality Tourism Training Certifications and Degree Courses</b> develops the human resources' operational and management skills required by the local tourism industry in terms of international standards with an emphasis in developing practical training opportunities relevant to the Belize context. The goal is to increase the quality of tourism services management and delivery in the tourism sector and will therefore directly result in an enhanced customer experience and stimulate growth of the local tourism economy.</li> <li>▶ <b>The Sub-program for Tour Guide Training and Accreditation</b> enhances skills among the Belize network of National Tour Guides through revision and updating of the general accreditation training modules, addition of safety and security certification modules and developing a mechanism to train and certify in specialty activities.</li> <li>▶ <b>The Sub-program for Development of the Hospitality &amp; Tourism Polytechnic Institute of Belize</b> creates a facility whose core functions will be to operate a hospitality and training school of excellence, tourism vocational training programs, an eco-lodge and sustainable tourism research centre.</li> </ul>
<b>Sustainable Tourism Development Program</b> <ul style="list-style-type: none"> <li>▶ <b>The Sub-program for Tourism Resources Management and Conservation</b> aims to identify and qualify an economic value of the resource in order to raise awareness and justify conservation efforts. The subprogram designs a plan to identify and assign an economic value of the tourism resources in order to define limits of change and validate conservation efforts.</li> <li>▶ <b>The Sub-program for Tourism Land Use Planning and Development Support</b> aims to create a framework for tourism land use allocation that involves planning with social and environmental safeguarding criteria. The sub-program creates a land use master planning process of tourism zones as a standard for tourism development.</li> <li>▶ <b>The Sub-program for Pro-poor Tourism and Ethnic Groups Tourism Linkage</b> supports efforts to identify and support vulnerable groups to benefit from the tourism economic value chain by strengthening the participation through the development of inclusion mechanisms.</li> </ul>



### 5.3 Infrastructures for Tourism Destination Development

#### Description

In order to enhance positive sustainable impacts from tourism the destination must entirely be equipped with basic infrastructure, transportation infrastructure, tourism supply and facilities and skilled human resources.

There are two programs described:

1. Basic infrastructure and support services development
2. Development of national connectivity

According to the conclusions of the diagnostics, which pointed out the infrastructure elements constraining Belize's tourism development, Belize as a destination requires improvements in at least the following general issues:

- ▶ **Basic infrastructure and support services**, such as upgrading, expanding and enhanced management of water treatment, waste management, telecommunications and banking services.
- ▶ **Development of national connectivity**, responds to the need of transportation infrastructure improvements such as enhancing highways and road conditions, regional and international airport safety and capacity, sea port and pier facilities development.

The proposed general actions aim to cover those infrastructure gaps and hence to contribute to global tourism development of the country at national and regional/local basis. Specific infrastructure and facilities development actions contributing particularly to product enhancement will be covered in the "Product Development Macro-Program" – section of the NSTMP.

#### Vision 2030

- ▶ Provides its residents and the tourism industry with basic services such as electricity and energy, water and sanitation, refuse and waste removal
- ▶ Belize will promote the use green technology and renewable resources to effectively and sustainably solution energy and water consumption.
- ▶ Improved and enhanced means and possibilities of arrivals (in terms of quality, quantity and safety issues) and movement throughout the destination.
- ▶ Enhanced transportation handling capacities and modern facilities/services that meet international safety and quality standards.

#### Lead stakeholder

MTCAC should be the lead responsible institution for strengthening the implementation of these programs, while the other institutions such as the Ministry of Works and its departments will be the true executing task forces who will analyze the potential demand and system/infrastructural requirements for 2030, taking into account larger numbers of tourists and higher population at tourism destinations.

#### Objectives

- ▶ To increase tourism arrivals and tourism movement within the region and the country
- ▶ To reduce health hazards and visual and environmental pollution.
- ▶ To reduce consumption of scarce resources

- ▶ To improve application green technologies recycling and energy conservation
- ▶ To enhance transportation capacity by meeting increasing tourist arrivals and flows
- ▶ To enhance transport safety and reliability
- ▶ To enhance the tourism destination's competitiveness
- ▶ To increase the tourism satisfaction level

### Program summary

Sub-programs description
<b>Basic infrastructures and Support Services Development</b> <ul style="list-style-type: none"> <li>▶ <b>The Sub-program for waste management for tourism destinations</b> strengthens the management and upgrading of existing systems at tourism destinations and tourism sites and assets throughout the country.</li> <li>▶ <b>The Sub-program for non-renewable resources management in tourism destinations</b> will identify the needs and constraints of limited consumption of resources (water and energy) in tourism destinations and sites, as well as plan for the growth expected from integral development of tourism destinations projects. It devises appropriate solutions and investment schemes.</li> <li>▶ <b>The Sub-program for raising awareness and incentives</b> stipulates the creation of awareness campaigns and incentive programs in order to enlist public support in reducing the pressure in the current and future systems.</li> <li>▶ <b>The Sub-program for telecommunication and banking services</b> assesses the actual state of banking and telecommunication networks in Belize and proposes different steps to address the situation.</li> </ul>
<b>Development of National Connectivity</b> <ul style="list-style-type: none"> <li>▶ <b>The Sub-program for Air Infrastructures and transportation improvement</b> will improve the international airport terminals in terms of infrastructure and facilities and enhance the services offered in order to cater for the expected numbers of tourists travelling to Belize.</li> <li>▶ <b>The Sub-program for Land connectivity and road infrastructure improvement</b> improves Belize's insufficient land road infrastructure in terms of quality and safety required by international tourist and therefore improves the transportation standards through the country. In addition, it enhances the access of tourism streams to rural areas and neighboring countries and alleviates the sources for traffic congestions.</li> <li>▶ <b>The Sub-program for Sea connectivity and transportation improvement</b> will foster additional connections to further tourism destinations by boat, ferry or water taxi. Additionally the program will enhance tourists' experience when travelling by sea and provide attractive facilities on piers by developing larger pier structures unifying various smaller ones.</li> </ul>

## 5.4 National Tourism Marketing Macro-program

### Description

The marketing development macro program structures actions to optimize the different promotion and communication efforts toward the local and international markets.

Actions area divided into three programs:

1. Strategic marketing
2. Tourism marketing network
3. Operational marketing

**The strategic marketing program** starts with the strategic plan and an intelligence system, as the two main tools to define strategies and country guidelines for marketing. Then it provides the framework to make products marketable, according to the overall philosophy of the NSTMP of Belize. Finally it considers civil awareness about tourism a key asset to reach in order to generate the appropriate climate for a complete tourism experience.

**The marketing network program** organizes the contact points to reach the market, either at the source markets or in the destination once in Belize.

The third program is focused to make the strategies **operational marketing**. It contents communication, travel trade and promotional activities. Furthermore, it has a specific sub-program to follow up all new technologies trends and opportunities for marketing. This program also includes a specific sub-program to increase and ease connectivity of Belize in all transport means (air, sea, land), which will lobby for new connections and frequencies, as well as conditions to operate in Belize.

It is important to mention that this NSTMP for Belize states and defines the strategic framework where operational activities and tactical decisions should be taken. These activities include source markets and segment treatments; decisions on specific tools or tasks to be done under promotion (such as trade fairs participation, road shows, etc). Also, within this plan, there is a special instruction for developing in a regular basis every year, an Operational Marketing Plan, where all the specific tasks and tactical decisions have to raise up.

### Vision 2030

- ▶ Maintain and manage Management Information System (MIS) as a key tool for successful marketing
- ▶ Renew operational marketing every year and strategic marketing plan every 5 years
- ▶ Keep product development approach
- ▶ Offer multiple and innovative information distribution channels and an international representation network
- ▶ Use of dynamic market segmentation to target niche markets

### Lead stakeholder

BTB Marketing Department and Product Development Department will be the main stakeholder to develop strategic and operational models to implement the suggested programs. Partnership with local stakeholders, Belizean “ambassadors” and international representatives are essential for the success of this program.

## Objectives

- ▶ Position Belize as a World Class tourism destination
- ▶ Increase tourism intensity (arrivals, overnights, direct revenue and average length of stay) from the international and national tourism market
- ▶ Raise the general awareness on the destination products offering
- ▶ Enhance the overall visitor satisfaction of the experience traveling to Belize
- ▶ To enhance local income generation potential
- ▶ To optimize cost/benefit ratio of marketing actions
- ▶ To increase business sales by structuring BTB's new commercial booking possibilities
- ▶ To enhance arrivals to Belize through improved connectivity
- ▶ To position Belize as a World Class destination through targeted publicity
- ▶ To enhance visitor satisfaction through effective use of CRM models

## Program summary

Sub-programs description
<b>Strategic Marketing Program</b> <ul style="list-style-type: none"> <li>▶ <b>Marketing Intelligence Management:</b> creation of a Tourism Observatory for market intelligence as a key tool to optimize decisions and orient investments for tourism development in the country.</li> <li>▶ <b>Belize Tourism Positioning Management:</b> Once the market oriented strategic plan is settled, a critical component for marketing is the definition and positioning of a tourism concept for Belize, its tourism products and destinations.</li> <li>▶ <b>Tourism Product Clubs Development Framework:</b> As a strategic tool to develop quality and commercial products through a business adherence program that creates a network of business based on a product club concept and standard quality criteria.</li> <li>▶ <b>Tourism Awareness Development:</b> broad tourism awareness campaigns for raising pride in Belizean culture and esteem of foreign visitors, an important aspect of the tourism experience.</li> </ul>
<b>Tourism Marketing Network Program</b> <ul style="list-style-type: none"> <li>▶ <b>The sub-program for promotion network in Belize</b> – tourism visitor centers defines, conceptualizes and develops information and welcome centers at tourism destinations and strategic points</li> <li>▶ <b>The sub-program for international tourism marketing offices</b> will develop an international tourism marketing and representation network which will market and promote Belizean tourism at the market origin</li> </ul>
<b>Operational marketing Program</b> <ul style="list-style-type: none"> <li>▶ <b>The sub-program for communication and promotion</b> develops tourism marketing actions to increase the destination awareness worldwide and the direct potential sales. This should be planned according to the strategic marketing plan, and also monitored by the MIS.</li> <li>▶ <b>The sub-program for marketing with new technologies</b> will develop opportunities including the usage of innovative tools for tourism marketing (i.e. enhanced reality, role games, holograph, helmet vision, 3D devices, etc.).</li> <li>▶ <b>The sub-program for sales and commercialization</b> will focus on the usage of adequate commercial channel opportunities, in order to increase business sales using new formats and tools.</li> <li>▶ Finally, <b>the sub-program of national connectivity</b> will focus on maintaining transport connections at the most developed level possible using all means of arrival in Belize (sea, air, land); and according to the development and capacity of the whole destination along time.</li> </ul>

## 5.5 Tourism Product Development

### Description

The Tourism Product and Quality Development macro-program has six programs, one for each of the selected tourism products to develop in Belize.

1. Program for Cultural Tourism Development
2. Program for Nature-based Tourism Development
3. Program for Sun and Beach Tourism Development
4. Program for Cruise Tourism Development
5. Program for Nautical Tourism Development
6. Program for Leisure and Entertainment Tourism Development

Each program is divided into a similar structure as the preceding macro-programs. Even though it may appear that their subject matter overlaps, these tourism product programs and sub-programs will be focused only in their specific area of expertise, leaving general and across-the-board interventions to the previous macro-programs. All programs are focused on one specific tourism product and they are all composed of the same sub-program structure, as follow:

- a. **Business & product development:** oriented to develop business concepts at destinations level. They intend to become the core concepts to appeal to the visitors.
- b. **Infrastructure & accessibility:** regarding accessibility to the area where the product is operated, the inner support infrastructure to assure the product operation; and in some cases, any very specific infrastructure which constitute part of the product itself.
- c. **Marketing & awareness:** focused on supporting specific marketing activities in order to reach the target segments including Product Specific Branding and marketing channels.
- d. **Standards & Safety:** include specific guidelines, standards and regulations needed for the product development and operations.
- e. **Capacity building:** specifically addressed product cluster human resources capacity development needs to operate with minimum quality guarantees.
- f. **Sustainability:** includes the identification, assessment and monitoring of specific natural and cultural safeguards needed to avoid degradation of tourism assets. Also, develops inclusion mechanisms in order to alleviate poverty, increase local community benefits and support community tourism related initiatives.
- g. **Governance:** focused on identifying specific regulations need for sustainable product development, on investment and fund raising to foster economic initiatives, and on specific public-private partnerships schemes.

The purpose of the structure of the Product Development Macro-program supports the leading criteria and approach of the Master Plan: to be product driven and to optimize resources by centralizing all aspects of product development under one program. Additionally, and in order “to be pragmatic” specifically in terms of budget availability and allocation, in the case of budget shortage, the tactic for implementation will be to focus on the priority Tourism Product Development programs first.

### Vision 2030

- ▶ By 2030, Belize’s culture tourism and nature based tourism will reach consolidation and maintain sustainable growth while becoming the main motivations to visit Belize. The products will offer the visitor a diverse tourism portfolio with unique assets and destinations that are easily accessible, structured and highly conceptualized.



- ▶ Sun & Beach tourism is expected to reach consolidation by 2030. The product will offer the visitor a diverse portfolio including activities and facilities for both relaxation and entertainment by the coast.
- ▶ Cruise tourism would have re-launched to encompass two sub-products, conventional cruise and pocket cruise. Cruise tourism destinations will manage their resources and visitors in order to prevent any kind of negative impacts and deterioration.
- ▶ Nautical tourism is expected to become tourism product at a growing stage. Supported by a full system of marinas along the Belizean coast providing a full set of specialized services.
- ▶ A Leisure & Entertainment Area will offer mid-high quality products composed of brand name shops, leisure facilities and other value added services. Furthermore, the concept will expand to other destinations as a complementary offer.

### *Lead stakeholder*

The MTCAC would be the lead stakeholder in charge of the policies development while each BTB's Tourism Product Managers are lead responsible for structuring their product portfolio and leading product conceptualization and development. They would liaison with other BTB departments for key support, such as Marketing, Sustainability and Quality Assurance. Additionally it will work with BTB fund raiser position and the NSTTF for sustainable funding sources. Other key stakeholders in product conceptualization, productive infrastructure and asset conservation are:

- ▶ NICH in partnership with local university scholars and anthropologists for cultural concepts and safeguard mechanisms.
- ▶ NGOs, Ministry of Natural Resources and Environment and Coastal Zone Management, for asset management and conservation efforts
- ▶ Ministry of Economic Development to support inclusion mechanisms for poverty groups.
- ▶ Ministry for Urban Development and Ministry of Works for destination integral development.
- ▶ Beltraide for attraction of foreign direct investment and business development support

### *Objectives*

- ▶ To enhance the visitor's satisfaction level and competitive advantage by diversifying the tourism portfolio into experiential tourism offering
- ▶ To further distribute tourism flows by enhancing access and safety conditions
- ▶ To attract new markets and market segments by diversifying Belize's tourism product portfolio
- ▶ To increase income generating potential of local tourism industry
- ▶ To harness tourism growth as a sustainability for conservation efforts
- ▶ To increase the number of overnights spent at Belize's tourism destinations
- ▶ To increase local participation and reduce poverty pro-poor tourism mechanisms.

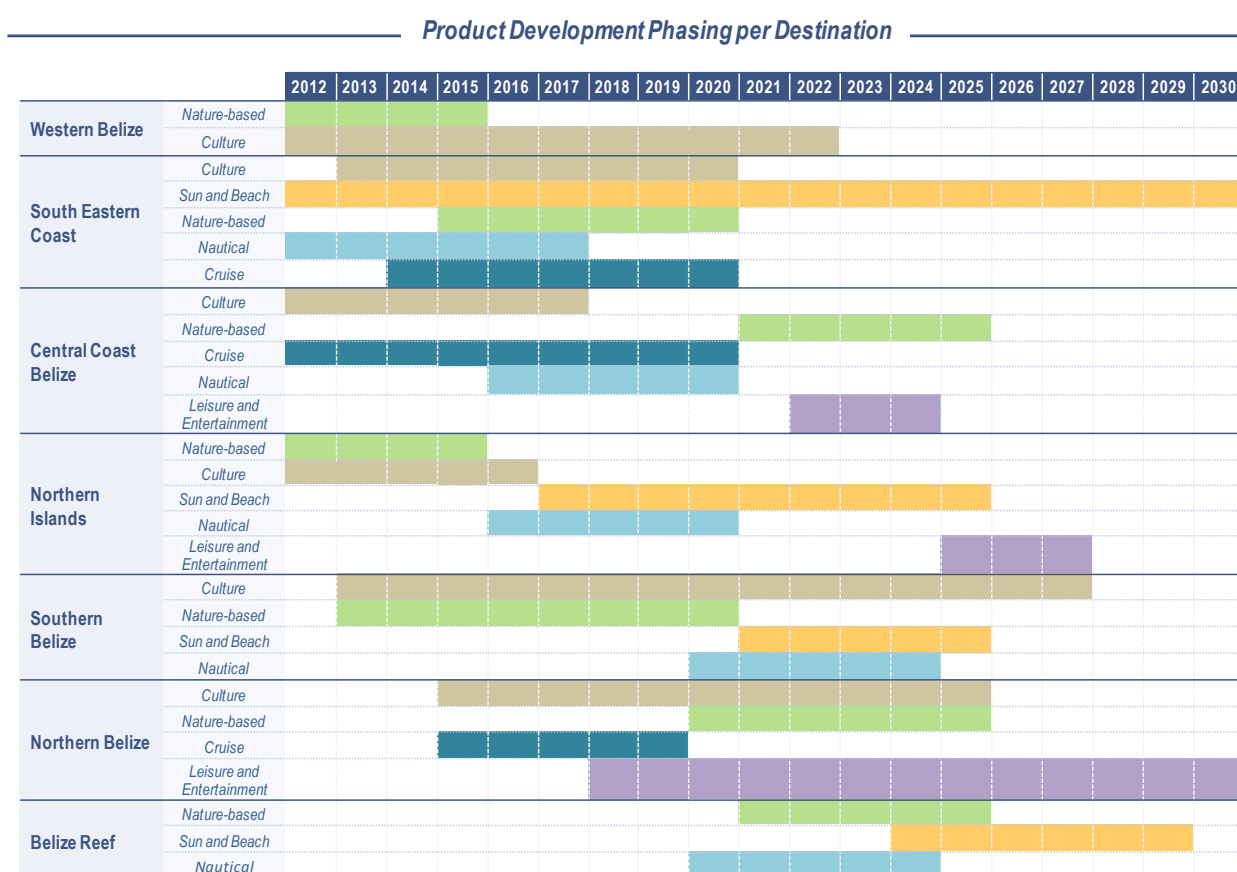
## Program summary

Sub-program for Business and Product Development description
<b>Cultural Tourism Development</b> <ul style="list-style-type: none"> <li>▶ The design, master plan and development of <b>Belize's National Museum of Anthropology</b> showcasing Belize's different cultures, ethnic groups, traditional heritage and histories.</li> <li>▶ The concept development for <b>Mayan Sites Integral Development</b> which structures, designs, planes and develops Mayan temple sites with similar infrastructure, services and facilities.</li> <li>▶ The concept of <b>Enchanting Belizean Villages</b> that restores, embellishes, and revitalizes colonial heritage and historic buildings in order to enhance the qualitative visual impacts and the preservation of architectural heritage.</li> <li>▶ The development of <b>Rural Tourism Sites &amp; Routes</b> which develops the rural tourism portfolio by structuring traditional agricultural products as tourism products.</li> <li>▶ The concept development of <b>Belize Traditional Markets, Festivals and Themed Programs</b> to develop the living culture portfolio by focusing on mechanisms that foster the participation of local communities and strengthens the inclusion of ethnic groups and minorities.</li> </ul>
<b>Nature-based Tourism Development</b> <ul style="list-style-type: none"> <li>▶ The concept development for <b>Belize's Ecotourism &amp; Adventure Activity Centers</b> which provide the visitor with information and an introduction to the destination, its assets and its tourism products.</li> <li>▶ The design, master plan and <b>development of Ecotourism &amp; Adventure Routes</b> linking together Belize's different nature-based tourism sites and structuring them as attractive tourism destinations.</li> <li>▶ The concept of <b>Integral Development of Ecotourism and Adventure Sites</b> which structures, designs, master plans and develops sites into an integrated system of infrastructure, services and facilities, developing the entire value chain.</li> </ul>
<b>Sun &amp; Beach Tourism Development</b> <ul style="list-style-type: none"> <li>▶ <b>Belize Waterfront Experience Development</b> using the coastlines and structuring them into an attractive visitor asset providing diverse entertainment facilities and services.</li> <li>▶ <b>Belize's Pristine Beaches</b>, the program provides a strong emphasis on the establishment, conservation and preservation of the beaches' pristine quality standards and safety regulations for which they will be internationally promoted and renowned.</li> <li>▶ <b>Sun &amp; Beach Destination Development</b> will structure the sun &amp; beach destination with its required development projects depending on the destination's concept, the sustainable use of resources and on the existing demand. However, Southern Belize, South Eastern Coast Belize and Southern Belize will require designing and master planning of their destinations which are to be developed from the ground up.</li> </ul>
<b>Cruise Tourism Development</b> <ul style="list-style-type: none"> <li>▶ <b>Belize City Main Cruise Hub Development</b> which will enhance the urban zoning of Belize City by restoring and embellishing the city area, and will develop services and facilities to enhance the visitor experience at the destination.</li> <li>▶ <b>Pocket Cruise Development</b> develops an integral development of the pocket cruise port including services and facilities for small cruise vessels and supporting tourism and leisure services and infrastructures for visitors.</li> <li>▶ <b>Belize Cruise Negotiation and Destination Management Committee</b> will manage the cruise destination and act as a negotiator for international cruise companies to enhance the benefits from the cruise tourism industry.</li> </ul>
<b>Nautical Tourism Development</b> <ul style="list-style-type: none"> <li>▶ <b>Integral Marinas Destination Development</b> identifying the most appropriate concept/business model and creating a network of marinas and sail clubs.</li> <li>▶ <b>Destination Development of Nautical Tourism</b> feasibility analysis for the destination and marina terminals, hence the master planning, mix use facility development, business development planning, the land/sea infrastructure, etc.</li> </ul>
<b>Leisure and Entertainment Tourism Development</b> <ul style="list-style-type: none"> <li>▶ <b>Belize National Leisure Area Development</b> which will conceptualize each destination's tourism product business model and develop the master planning and land use framework and search for potential investors and operators.</li> </ul>

## 6 Implementation considerations

### 6.1 Product Phasing schedules

The NSTMP for Belize will be implemented from 2012 until 2030, in 19 years. The intervention is phased according to two criteria: tourism products' priority for Belize; and tourism products' priority for each destination. The combination of these two criteria finally defines the following phased intervention:



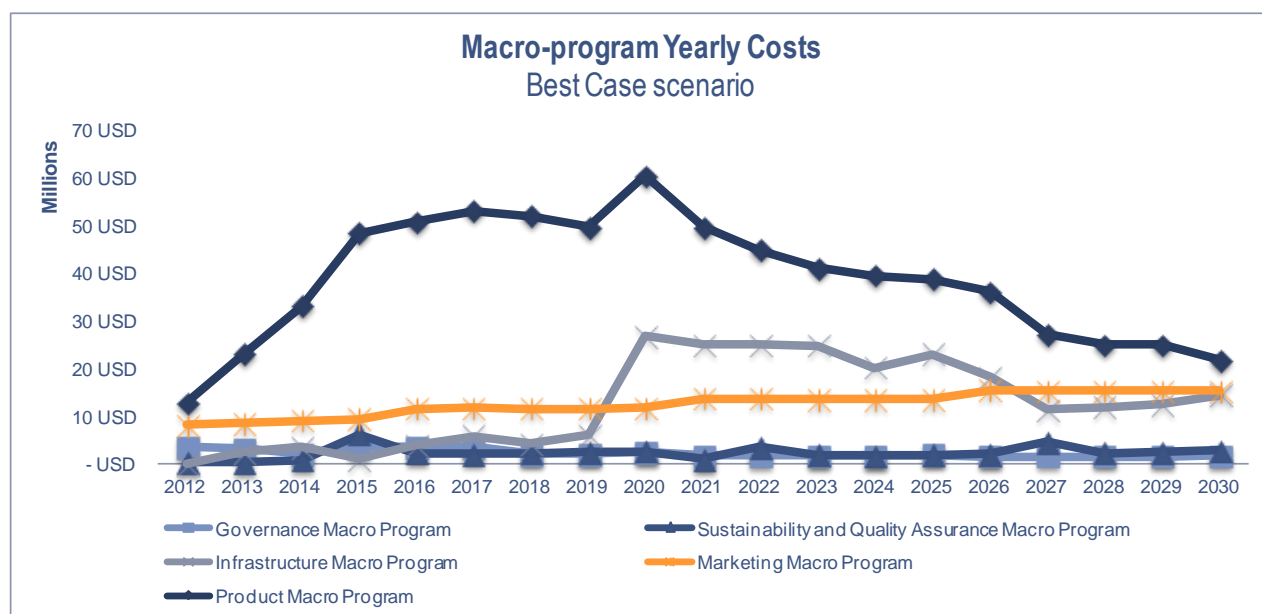
Source: T&L analysis, 2011

As a tourism-product-driven plan, all programs aim to support tourism product development. This, as well as other considerations related to convenience, urgency and cost effective results, will finally determine the implementation schedule.

It is also important to mention that all activities have to respect a process cycle, which basically means that even though they are planned to start in some specific moment, the major investments are not supposed to take place in that specific year. The projects will require an organization and lobby process, planning and modeling phase, and then construction and implementation. Finally, many projects require follow up, maintenance or updates, which are also part of the implementation schedule.

## 6.2 Budget allocation

This product phasing considerations of the implementation schedule of the NSTMP will affect the funding and financing schedule, providing differences in terms of funding allocation over time. The estimated preliminary budget will be a compound total of US\$1,305 million until 2030. The allocation evolution by macro-program will be:

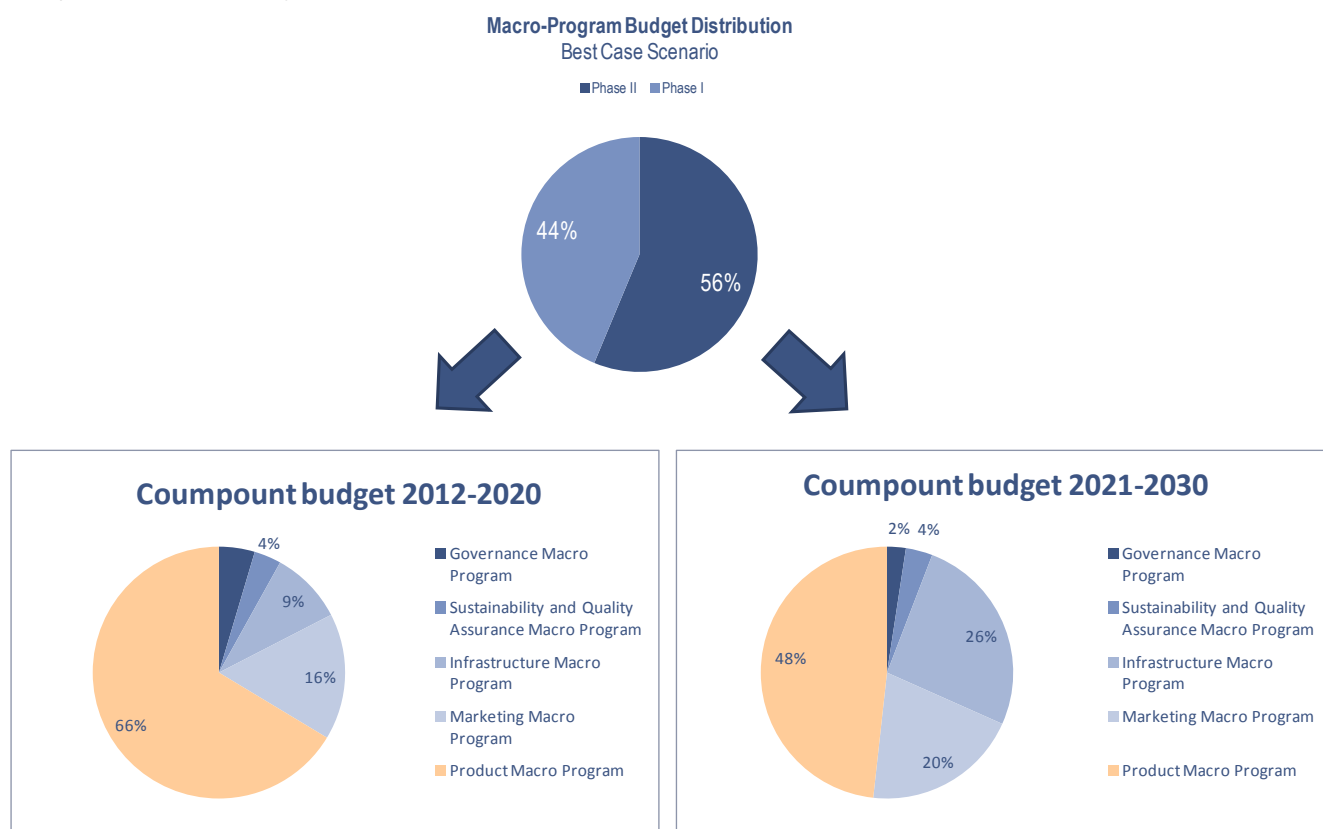


The Tourism Product Macro Program is clearly the one that leads budget allocation. Its most intense investment moments will be between 2015 until 2020. From there on, the investment will slowly decrease. The criteria behind this is to work from now until 2015 in order to get investment funds for product development, and then have some time to build and consolidate them. Especially the development of the new development in the area of Riversdale in Southern East Coast, the leisure and entertainment areas and nautical development. With 2020, the Infrastructure Macro Program is scheduled to start undertaking the national land connectivity including road improvements and enhancements and therefore create an investment peak. The Marketing Macroprogram evolves increasingly according to the need of commercial support for the consolidated tourism products. Finally, sustainability and quality assurance acts regularly over time, as does the Government macro program. This last named, despite having relative low volumes of budget allocation, is key for the whole plan's success.

The entire process can be divided into two major phases:

- ▶ **Phase 1. 2012 – 2020:** this phase allocates 44% of the total compound estimated budget for the Plan (US\$579 million), with 31.2% of the total allocated from 2012-2015 (US\$180.8 million), and 68.8% for the period 2016-2020 (US\$398 million). The largest component of the budget will be investment in the Tourism Product Macro Program, followed by Marketing activities. Notwithstanding, Governance projects implementation and positive results are the key for the rest of NSTMP success. Culture and Nature Based Tourism will take the lead in development, aiming to create a solid and competitive offering for the international market. In many cases, these two tourism products need site investments and specific infrastructure and equipment, while general accessibility or infrastructure are not so fundamental for those products (either in terms of market, tourism experience and volume of visitors). All in all, the reasoning is to create competitive tourism products.

- ▶ **Phase 2. 2021 – 2030:** this second phase gives protagonism to supporting infrastructure development and marketing, which will account for almost 50% of the entire budget planned for the phase. The new destination development in Stann Creek new Riversdale will be under construction, which will require extra investment in infrastructure. Marketing activities will rise, since culture and nature based products will be already working and competitive, and new destinations/products will need commercial support to attract visitors, and therefore investors for those new developments. This phase concentrates 56% of the total compound budget (US\$725.9 million).



### 6.3 Implementation and funding

In order to ensure long term sustainability of the NSTMP the responsibilities of implementation and control will have to be centralized by a unique **coordination agency** which coordinates the actions of the **implementation agencies**, the **strategic partners** and monitors and evaluates the implementation progress.

- ▶ The *coordination agency* will be responsible in executing the master plan objectives and comprised of three supporting units: management unit, implementation unit, monitoring and evaluation.
- ▶ The *implementation agencies* are supporting and implementing the decisions of the coordination agency and its units. These agencies are public organizations and associations specialized in specific domains such as public work, education, business and investment.
- ▶ The *strategic partners* represent the organizations and the tourism companies that will have a role in the specific projects of the macro programs.



The coordination agency will have the Project Implementation Manual as a tool to guide in management and control. This tool provides a synthesis of the identified lead implementers per macro-program, reduced budget scenario analysis, key priority investment projects, results framework, and risk management guidelines.

Additionally, and in order to assure long term political support for the NSTMP, the following mechanisms should be devised:

- ▶ Create a coordination agency that is managed by a technical team that is not politically oriented and is continuously funded beyond political will
- ▶ Creation of a Council of Ministers where key ministerial bodies would converge to support tourism development.
- ▶ Lobby for an affidavit for every running prime minister to sign agreement of maintain master plan goals after obtaining office. This will have a double benefit:
  - a. Will allow running minister to have a tourism development plan to support
  - b. And will ensure long term sustainability of Master plan implementation

In order to achieve a sustainable funding mechanism for the implementation of the NSTMP the following key considerations are to be taken into account:

- ▶ There is an urgent need to further analysis current tourism sector taxation budgets, allocations and rates in order to devise if additional taxes is a viable mechanism for fund raising
- ▶ Search for short-term and medium term funding sources while preparing a long term solution, identified possible solutions are:
  - Short-term: BTB 2012 budget planning
  - Short/mid-term: Classical ministerial budget allocation
  - Mid-term: Multilateral and donor agencies
  - Mid/long term: Partnership schemes with Private sector
  - Long term: National Sustainable Tourism Trust Fund
- ▶ Concerning budget availability, five scenarios have been considered:
  - Best case scenario, is the case where 100% of the NSTMP is implemented, resulting in USD 16.6 billion of compound incremental income
  - Worst case scenario, is the case where the NSTMP is not implemented, which results in a potential income loss of 65%
  - In Scenario 1 a 20% reduction of total investment results in a reduction of 29% of the compound incremental income<sup>4</sup>
  - In Scenario 2 a 47% reduction of investment results in a reduction of 59% in the compound incremental income
  - In Scenario 3 a 57% reduction of investment results in a reduction of 79% in the compound incremental income

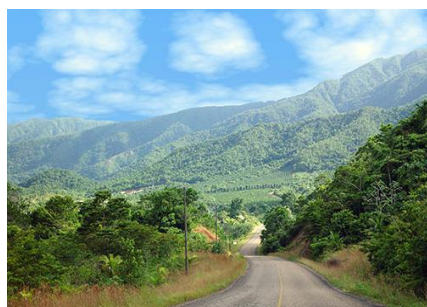
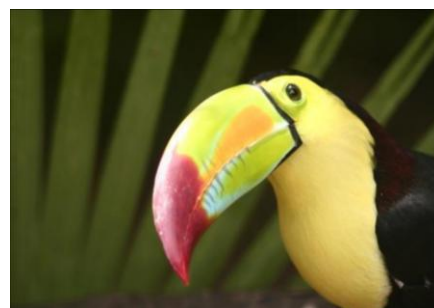
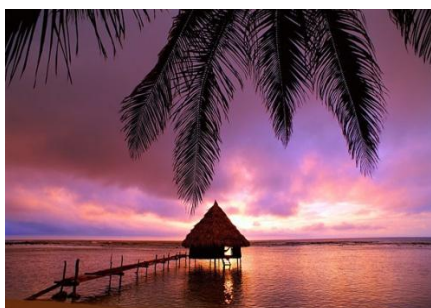
The overall investment analysis comparison shows that the *best case scenario* is the most cost-efficient scenario and the one with the highest return on investment

<sup>4</sup> The *compound incremental income* is the difference between the total compound income generated by the best case scenario MINUS the total compound income generated by the worst case scenario

# EXECUTIVE SUMMARY

## DIAGNOSTIC OF THE TOURISM SECTOR

### National Sustainable Tourism Master Plan of Belize 2030



*May, 2011*

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## 1. Introduction

Belize is a Central American country characterized by having fascinating underdeveloped nature and culture sites, a fact that has enriched its attractiveness and motivated an increasing number of tourists. The tourism industry has been developed up to the point of becoming an internationally recognized tourism destination with a wide range of tourism operators and employing a great number of Belize's population. Along these lines, the tourism sector in Belize is one of the main economies for the country accounting for 28.2% of the total GDP equivalent to BZD816.3 million and 28.3%<sup>1</sup> of the total employment.

The rich historic background of the Country is reflected by numerous heritage sites mostly Mayan sites with great value for tourism. However, many Mayan sites remain unexcavated and covered and have difficult access by road. Regarding ecotourism sites, Belize is characterized by having one of the most attractive coral reefs on earth including the iconic Blue Hole marine reserve and other many reserves and biodiversity. Accessibility and conservation are a major challenge in order to ensure a proper and sustainable tourism planning of these sites.

Under this scenario of tourism potential, this sector faces some challenges and needs certain amount of reforms in order to ensure sustainable and prospering economy of the region.

The Belize Sustainable Tourism Program (STP), with the intention to contribute to sustainable growth for Belize's Tourism sector, consists of two main components based on investment in the tourism destination and institutional strengthening and capacity building for policy, destination planning and management. Component II is based on the priorities of a National Sustainable Tourism Master Plan and five key destinations development plans.

Within the framework of the National Sustainable Tourism Master Plan, the overall objective of the present document is to provide a scoping and diagnostic report of the current situation of the tourism sector in Belize, as well as a first preliminary strategic approach that will be validated with STP and BTB serving as a basis for the future development of the National Sustainable Tourism Strategies.

The report contains a complete analysis of the tourism sector identifying the main challenges Belize tourism sector is presently facing. The following is a list of the several issues contained in the report:

- ▶ Research and evaluation of Belize tourism market from a demand point of view
- ▶ Identification and assessment of Belize's relevant tourism assets according to their attractiveness and market potential
- ▶ Analysis and evaluation of the tourism facilities and services, as well as the tourism industry operating in Belize
- ▶ Assessment of the main environmental and social issues of Belize specially which are affected by tourism
- ▶ Assessment of the institutional capacity and participatory governance in Belize
- ▶ Identification and exploration of the opportunities of the tourism industry in Belize

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<sup>1</sup> World Travel & Tourism Economic Research – 2010 Travel & Tourism Economic Research for Belize



## 2. Tourism Governance Analysis

The goal of this task is to present the relevant governmental bodies involved in tourism issues in Belize and assess the institutional capacity in terms of public administration's structure. The institutional capacity of stakeholders is a key tool for understanding the social and institutional context of a project or policy.

The governance analysis provides a foundation and structure for the participatory planning, implementation and monitoring. Further, the National Tourism Policy will be analysed, focussing on organisational instruments, such as the Belize Tourism Board; general sector plans, programmes, and regulatory and financial instruments that are utilised to govern tourism in Belize.

The outcomes of this task are potential gaps and opportunities in participatory governance for tourism development, which will be highlighted at the very end of the document in section 5 Final Conclusions.

### 2.1 Assessment of institutional capacity and participatory governance

Belize's governance framework is composed by a set of stakeholders from the public, private and civil sector, which are active in undertaking several tourism development initiatives.

#### Belize Key Tourism Stakeholders by Sector

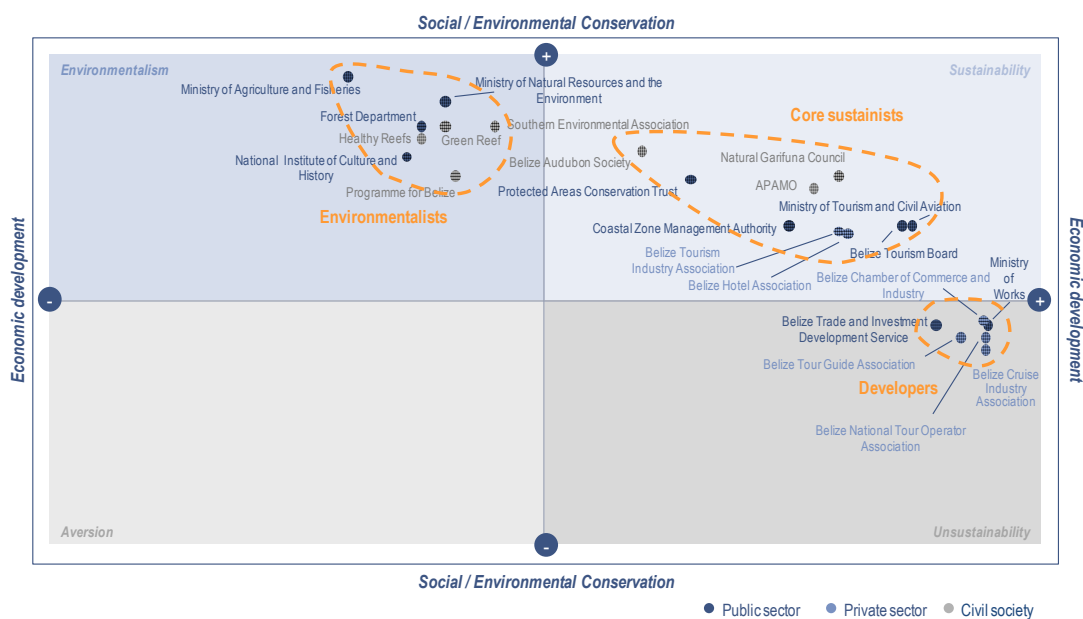
Public	Private	Civil (Social and NGO's)
<ul style="list-style-type: none"> <li>▶ Ministry of Tourism and Civil Aviation</li> <li>▶ Ministry of Natural Resources and the Environment</li> <li>▶ Ministry of Agriculture and Fisheries</li> <li>▶ Ministry of Works</li> <li>▶ Belize Tourism Board</li> <li>▶ National Institute of Culture and History</li> <li>▶ Coastal Zone Management Authority</li> <li>▶ Forest Department</li> <li>▶ Protected Areas Conservation Trust</li> <li>▶ Belize Trade and Investment Development Service</li> </ul>	<ul style="list-style-type: none"> <li>▶ Belize Tourism Industry Association</li> <li>▶ Belize Chamber of Commerce and Industry</li> <li>▶ Belize Hotel Association</li> <li>▶ Belize Cruise Industry Association</li> <li>▶ Belize National Tour Operator Association</li> <li>▶ Belize Tour Guide Association</li> </ul>	<ul style="list-style-type: none"> <li>▶ Belize Audubon Society</li> <li>▶ Southern Environmental Association</li> <li>▶ Programme for Belize</li> <li>▶ Green Reef</li> <li>▶ Healthy Reefs</li> <li>▶ APAMO</li> <li>▶ National Garifuna Council</li> </ul>

Once the key stakeholders have been identified, their possible interests in the project should be highly considered. Some stakeholder interests are less obvious than others and may be difficult to define, especially if they are hidden, multiple or in contradiction with the stated aims or objectives of the organization they represent. Nevertheless, there are two objectives that should be highlighted stakeholders aim from the project: economic development and social/ environmental conservation.

Belize's Tourism Master Plan, and especially considering the particularities and sensitiveness of Belize tourism assets, will be strongly conceived from a sustainability approach, which means any development in tourism should be considering any social/ environmental relevant issue setting a balance between economic development and conservation. Therefore, contribution from those stakeholders sustainable tourism focused (core sustainists) should be highly considered, and therefore be the critical partners of the project.



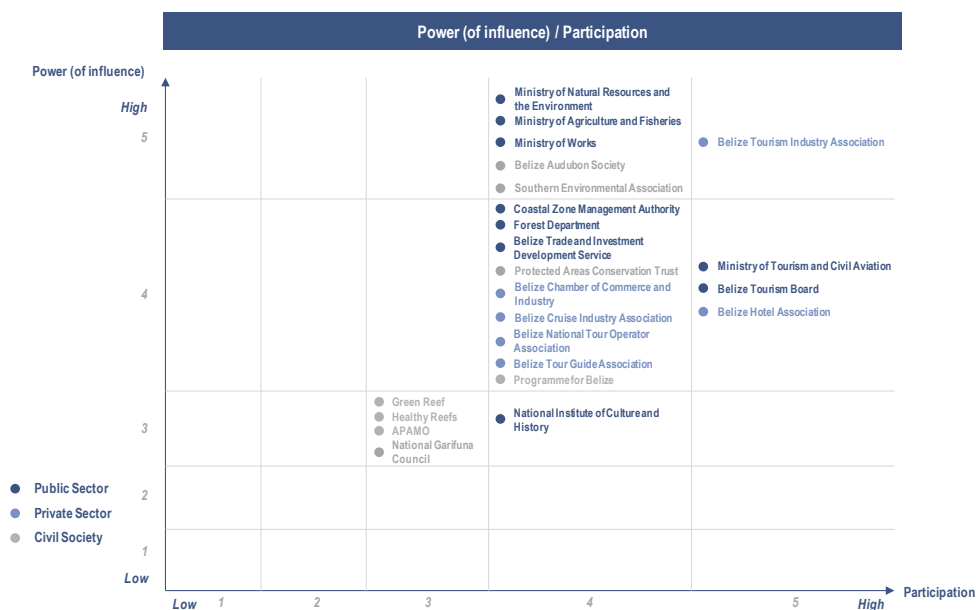
## Belize's stakeholders' interest Matrix



The core sustainists (sustainable tourism focused stakeholders) identified are: the National Garifuna Council, APAMO, the Belize Audubon Society, the Belize Tourism Industry Association, the Belize Hotel Association, the Ministry of Tourism and Civil Aviation, the Belize Tourism Board, the Coastal Zone Management Authority and the Protected Areas Conservation Trust.

The other stakeholders are classified by their interest of either supporting an environmental approach or those following an unsustainable path. It is then the aim of the most powerful core sustainists to influence these stakeholders to follow the path towards sustainable tourism.

Factors such as power and participation on tourism policy development of different stakeholders could also be ranked along simple scales, and mapped against each other, as a step in determining the grade of each stakeholder's participation according to their power of influence.



From the previous model, it should be remarked BTB's general approach to governance is to involve Belize tourism stakeholders as much as possible through participatory processes, involving not only national but also local stakeholders. The model analyzing Belize's participatory governance highlights as well the particular involvement of certain stakeholders in the core decision making processes which are BTIA and BHA, in addition to other individual members of the tourism business involved, since those two institutions and those individuals are members of BTB's Board of Directors.

## 2.2 Tourism policy analysis

The analysis of Belize's Tourism Policy focuses on its organizational instruments, such as the Belize Tourism Board (BTB) in terms of its responsibilities and duties, on general sector plans, programs and policies, and on regulatory and financial instruments.

### Organizational instruments

BTB is in charge of researching, planning, developing and promoting the tourism industry, its resources and its local tourism products on a national and international level. It is among others accountable to create programs to increase tourist traffic to Belize, to foster favourable arrangements for the entry of tourists into Belize, encourage the development and promotion of capacity building programs for staff employed in the tourism industry and to raise the awareness of environmental protection and conservation of resources.

BTB is composed of four operational departments, namely the product development department, the hotels department, the marketing and public relations department and the finance and administration department. In the near future, further departments will be added to the organization: the Destination Planning Department and the Tourism Police & Security Unit.

The following graph presents the organizational structure of the BTB, as it will be initiated in the near future.

### BTB's New Organizational Structure



BTB is governed by a Board of Directors appointed by the Minister of Tourism. The Board itself is composed of ten members - chaired by the Minister of Tourism - who are appointed directly by the Minister. Nine of the members belong to the private sector, representing some of them institutions such as the BTIA and BHA. Hence, the BTB governance structure is based on a strategic partnership between the Government of Belize and the tourism private sector.

#### *General sector plans, programs and policies*

Belize's Tourism Policy is designed under the following and further principles: to improve the quality of life of the population, finding the balance between the needs of stay over tourists and cruise passengers, the fostering of a positive environment for the industry, a strong local participation and that planning and management are based on partnership and collaboration agreements.

The policies and strategies are summarized and classified in the following documents:

- ▶ A Tourism Strategy Plan for Belize (1998)- The report provides an analysis of the current tourism climate and providing a thorough ten year strategy with the specific targets of growth of the national GDP, a 20% increase in total tourism- related jobs and an annual increase of 20,000 visitors. Further strategies mentioned are: a growth management strategy and a strategy to encourage Belizean ownership through the tourism sector. The report focuses on the development of administrative bodies and the infrastructure in terms of accessibility and product development.
- ▶ Belize Tourism Policy (2005)- A policy report by the Belize Tourism Board to reassess the current priorities of the organization and to propose concrete plans for archiving the Board's goals beyond the timeframe of the Tourism Strategy Plan— including policies embracing Belize as a “eco-ethic” destination management— strike an important balance among the main tourism segments (stay over and cruise passengers), market the product development as a nature-based and adventure tourism destination, strengthen linkages with other national priorities and further marketing and promotion policy including market researches to identify the demand for the development of further niche products.
- ▶ Belize Cruise Tourism Policy- The policy report outlines the national priorities for the Belize cruise visitor market, the laws and policies for cruise ships, and the associated environmental concerns. This document treats security arrangements at strategic locations to enhance the visitor's experience, sets asset capacity levels to prevent overcrowding and guidelines on training for tour guides. It promotes cultural involvement to cruise passengers for encouraging overnight stays and sets guidelines on how to establish linkages between cruise ship needs and local suppliers.
- ▶ Belize Tourism Board Action Plan (2009/2010)- A presentation by the Belize Tourism Board that outlines the finances of the Board and addresses the progress, goals, and plans for the Board going forward.

#### *Regulatory instruments*

There are only few legislation acts that maintain the regulations and standards for Belize tourism. These are listed as follows:

- ▶ Belize Tourism Board Act (2000): The foundational act outlines the composition, responsibilities, and powers of the Belize Tourism Board (BTB).
- ▶ Belize Timeshare Act (2007): The Act details the laws and regulations that monitor the timeshares used for tourism accommodations.

- ▶ Belize Hotels and Tourist Accommodation Act (2000, revised): The Act outlines the registration process for accommodations, the standards each must abide, and the legal stipulations for adhering to the stated guidelines.
- ▶ Belize Hotels and Tourist Accommodation Act Subsidiary Laws (2003, revised): The subsidiary laws provide a supplement to the primary act by specifying the minimums and requirements for various types of tourist accommodations.

#### *Financial instruments*

The Government of Belize (GOB) offers specialized and effective incentives to attract investments to all sectors of the Belizean Economy. However, **there is only one Fiscal Incentives (FI) Scheme that is applicable to the tourism service sector**. A tourism specific scheme is being prepared by the Ministry of Tourism, and a draft will be finalized by October 2010.

A special fiscal incentives act addressed to SME's is being designed and created to encourage investments by Belizeans, who are, as of today, investing below USD\$150,000.00.

### **2.3 Tourism governance critical issues**

Main conclusions from the governance and policy analysis assessment raise the following issues:

#### *Institutional capacity*

- ▶ A **broad set of stakeholders and interest groups** are composing the governance network of Belize's tourism sector. Main partners to be considered in the Master Plan should be the **sustainable tourism focused**. Environmentalists and strong developers should be involved to follow the sustainable path.
- ▶ **Certain core stakeholders should be highly considered** in the definition and implementation of Belize Tourism Policy due to the **strong impact of their activity in the tourism sector** (Ministry of Nature Resources and the Environment, Ministry of Agriculture and Fisheries, Ministry of Works, Belize Tourism Industry Association, Belize Audubon Society and Southern Environmental Association).
- ▶ **The Ministry of Tourism and BTB do not have the desired power of influence**, since certain key stakeholders such as the Ministry of Works and the Ministry of the Environment do plan their own policies, and projects for implementation, without considering their inputs. Presently investments ranging from infrastructures to tourism supply management are being made without the input of the tourism sector.

#### *Governance*

- ▶ **Setting the eligibility criteria** for BTB's Board membership and **providing transparency in the decision making** of the members enrolling the Board are critical for good governance. The Governance structure of BTB should be composed of members representing the industry as a whole, and therefore avoiding as possible individual interests.
- ▶ BTB's general approach to participatory governance is **to involve Belize tourism stakeholders as much as possible through participatory processes**. However, involvement should not be limited to policy definition but also on implementation phases.

- ▶ **Good involvement of certain stakeholders in the core decision making processes** which are BTIA and BHA, in addition to other individual members of the tourism business involved.
- ▶ **Further implication of key stakeholders is strongly required** such as the Ministry of Works and the Ministry of Natural Resource and the Environment, due to the high impact of their activity into the tourism sector.

#### *Tourism Policy and Management*

- ▶ **BTB has limited responsibilities to manage Belize as a tourism destination**, since the scope of work of BTB is constrained basically to marketing, registration/licensing and capacity building issues.
- ▶ **BTB is under-resourced to face the present and future challenges.** The organization should be implementing a funding mechanism encompassing core government funding together with BTB's own resource generation and contributions from the private sector.
- ▶ **Limited presence of BTB throughout the country**, since a part of their headquarters in Belize City, the organization is only present in San Pedro, and thus tourism visitor centers are not available in other relevant districts of the country.
- ▶ **Certain BTB departments have limited functions** and some relevant activities are not being undertaken by the organization.
  - Even though a Product Development department exists, their responsibilities are limited to quality assurance and training, rather than identifying product development gaps and strengthening Belizean tourism products.
  - Responsibilities of the future Planning department are limited, since BTB does not have the competence on planning issues.
  - Lack of a unit to achieve quantifiable results from the marketing activity, which means a unit focused on commercializing tourism products to target customers.
  - No department within the organization is responsible of developing new tourism facilities and services, ensuring appropriate basic and transport infrastructures, and fostering SME's development.
- ▶ Lack of a networked model used as a **lever to create a new solution and transform existing operations**. Issues such as product development, commercialization, development of facilities, etc. could be developed together with qualified partners to provide greater value to tourists, as well as the private sector and the Belizean civil society.
- ▶ Policies and procedures that drive the efforts of the tourism industry in Belize set **clear and consistent goals for the future of Belize tourism**.
- ▶ The legislation for tourism in Belize sets out a **comprehensive system for administering tourism and for setting the necessary regulations and standards** to maintain the quality of Belize's tourism industry.
- ▶ The Government of Belize (GOB) offers specialized and effective incentives that attract investments to all sectors of the Belizean Economy. However, **there is only one Fiscal Incentives (FI) Scheme that is applicable to the tourism service sector**. A tourism specific scheme is being prepared by the Ministry of Tourism, and a draft will be finalized by October 2010.



### 3. Tourism Market Analysis

The tourism demand analysis helps to understand current tourism markets and visitor segments, trends and opportunities and will serve as a basis for the tourism product design phase. The second part of this chapter will assess potential tourism demand through projections in different scenarios and presents the projected outcome after implementing the master plan suggested.

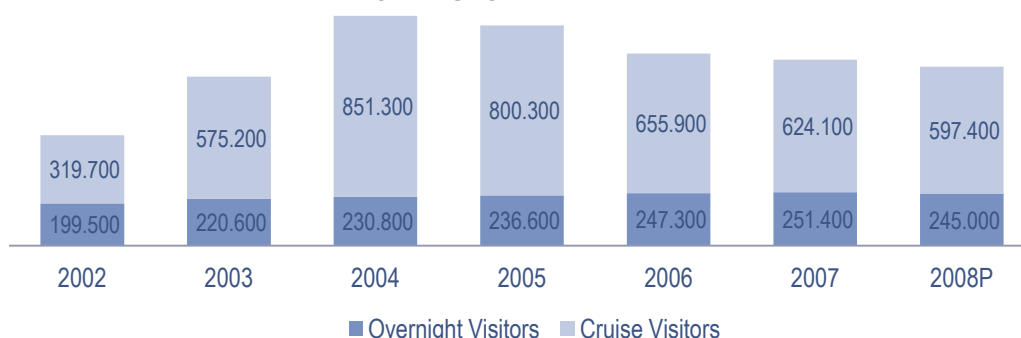
#### 3.1 Visitor statistics

##### *International Visitor Arrivals*

Total international visitor arrivals to Belize increased by 18.6% overall from 2002 to 2008. From 2004 to 2008, however, total arrivals decreased by an average of 6% per year

Variation in the overall arrival numbers over this period was largely due to the changes in annual cruise arrivals. Since cruise arrivals made up an average of 72% of all arrivals to Belize, the increase in cruise visitors from 2002 to 2004 and the decrease from 2004 to 2008 caused similar patterns in the overall arrival numbers.

**Evolution of International Visitor Arrivals to Belize  
by Category of Visitor (2004-2008)**



Source: Belize Travel and Tourism Statistics 2008, Tables 1.9 & 1.10

P = Preliminary R = Revised

In 2008 over 842,400 visitors came to Belize. Of those visitors, 597,400 were cruise passengers on day trips, while 245,000 were overnight visitors.

**Overnight Visitors to Belize by Season 2008**

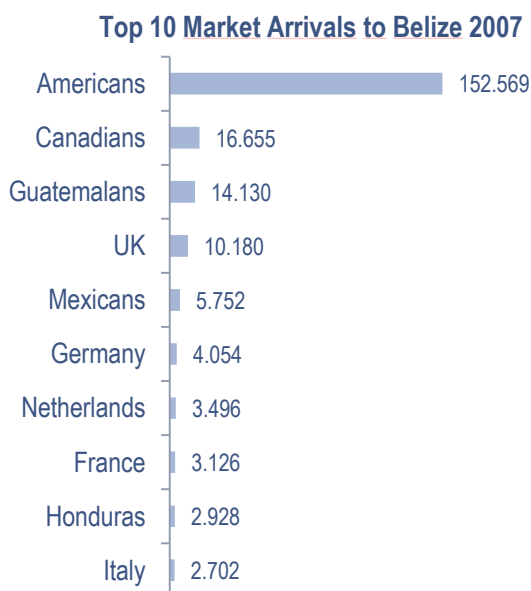


Source: Belize Travel and Tourism Statistics 2008, Table 1.12.

In 2008, arrival numbers varied from 9,000 to 31,000 overnight visitors per month with

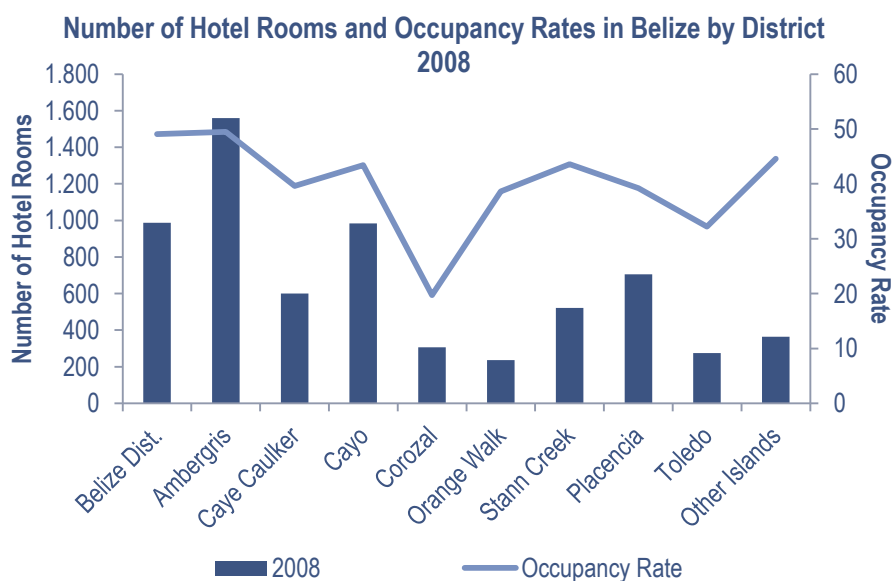
peak periods in February and March. September and October, the months associated with the height of the hurricane season, had the lowest number of overnight visitors.

The overwhelmingly largest inbound market remained the United States with 152,569 overnight visitors to Belize in 2007 representing 60.6% of the market share. Other key markets included Canada (6.6%), Guatemala (5.6%), the United Kingdom (4.0%), Mexico (2.3%) and Germany (1.6%).



Source: VEMS 2007

The most popular destinations for overnight visitors in 2007 were Belize & Ambergris with 70.0% of overnight visitors, followed by Stann Creek (13.9%) and Cayo (11.6%). Ambergris, Belize District and Cayo had the largest number of hotel rooms in 2008. Even with a smaller offering of hotel rooms, the districts of Stann Creek and Orange Walk showed strong occupancy rates while Toledo and Corozal performed the worst in 2008.

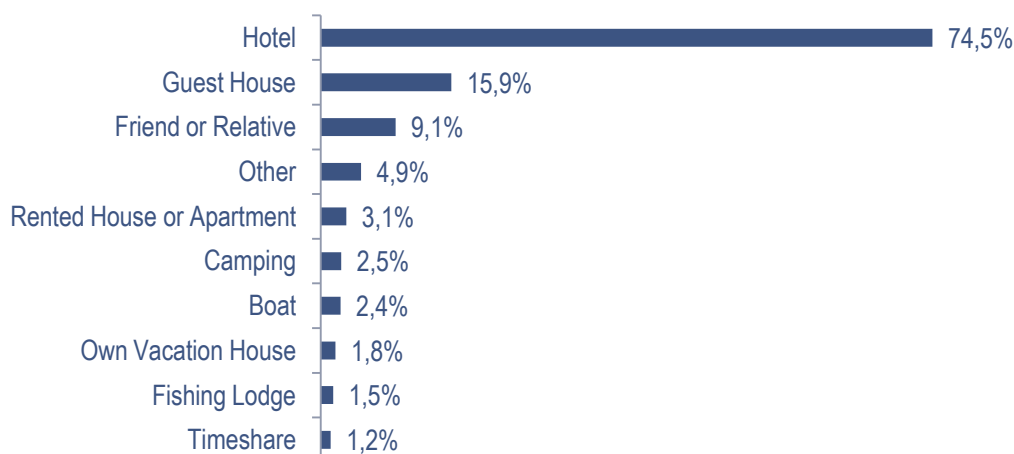


Source: Belize Travel and Tourism Statistics 2008, Table 2.2

### Means of Accommodation

Most overnight visitors choose to stay in a hotel (74.5%) while 15.9% stay in guest houses and 9.1% stay with friends or relatives. A small percentage of visitors choose other forms of accommodations such as camping, timeshares, or boats.

**Type of tourist accommodation in Belize 2007**

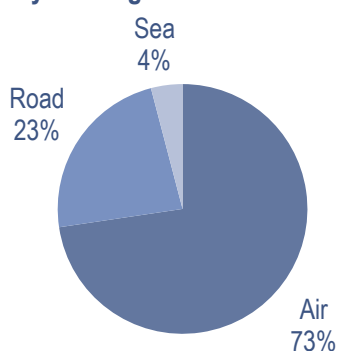


Source: 2007 Visitor Expenditure and Motivation Survey (VEMS)

### Means of Transportation

In 2008, the majority of overnight visitors travelled to Belize by air (73%). An additional 23% of visitors travelled by land and 4% by water. Of the air passengers, 41.2% take American Airlines and 31.6% take Continental Airlines. Of the surveyed return visitors, 84.4% had previously travelled by air, while only 4.0% had travelled by cruise ship. This small percentage demonstrates the need to better convert cruise visitors into overnight visitors.

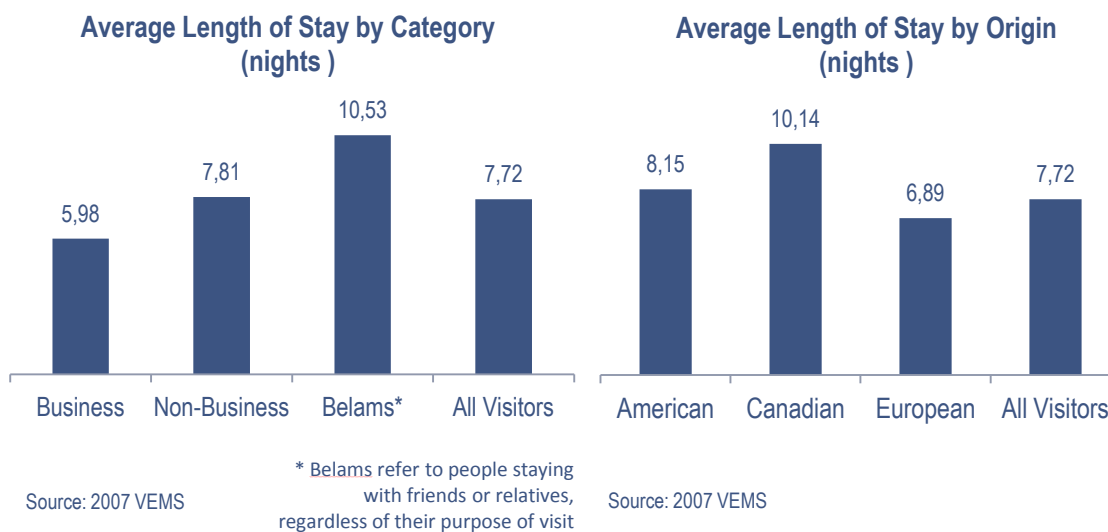
**Means of Transportation Used by Overnight Visitors 2008**



Source: UNWTO Statistics, Belize: Basic Indicators

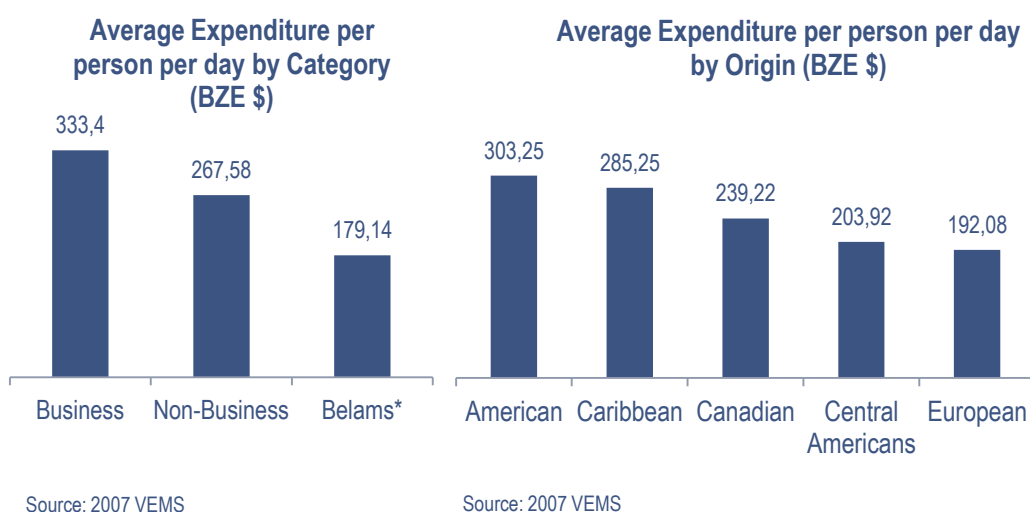
### Length of Stay and Visitor Expenditure

The average length of stay (ALOS) for all visitors to Belize was 7.72 nights in 2007. Non-business visitors, the leisure travellers that comprise the largest portion of overnight visitors, stayed on average 7.81 nights. Business visitors typically stayed for shorter periods (5.98) while Belams who do not purchase accommodations stayed for longer (10.53). Of the largest markets, Canadians stayed the longest with an average of 10.14 nights; while Europeans stayed on average 6.89 nights.



### Visitor Expenditure

Trip expenditure per day per person was lower for the European markets than for the American and Caribbean markets, which underlies the higher potential for closer markets rather than for the long haul travellers.



### Further Findings

- ▶ The average overnight visitor to Belize spends BZE\$ 267 per day. Business visitors spend more than average, as do visitors from the United States. Visitors from Canada spend less than average per day, and Europeans spend the very least (BZE\$ 192).
- ▶ People travelling with their spouse or partner make up the most popular travel group with 32.1%. An additional 30% of visitors travel with a group or friends, 20.7% travel alone, and 14.1% travel as a family. 35% fall in the 20-29 age bracket, 24% in the 30-39 age bracket, and 20% are above 50.
- ▶ 54% of total visitors are men and 46% are women. 47.3% of visitors are professionals and 16.8% are students.
- ▶ The vast majority travel to Belize for leisure (70.6%) while 6% travel for business.

- ▶ The most popular attractions in Belize are the longest reef in the western hemisphere, the Cayes, and the archaeological sites.
- ▶ Tourists to Belize highlighted value for money, transportation, entertainment, and restaurants as the tourist components in need of the most improvement. They cite the Maya sites, marine attractions, and national parks/reserves as the strengths.
- ▶ Most cruise visitors took self guided walking tours of the city. Others participated in visitors to Maya sites, cave tubing, snorkelling, and city tours in a vehicle.

### 3.2 Projections

*It is important to note that although the data analyzed is the most represent available it does not cover the period since and therefore does not include the more recent decline in the tourism industry due to the global economic crisis. The projections reflect an optimistic world economy and should be viewed with that in mind.*

Belize has had a steady overall increase in overnight visitors in recent years although the number of day cruise visitors has decreased significantly. However, the tourist expenditure in Belize experienced overall annual growth of 12.8% from 1997 – 2007. This suggests a promising future for Belize's tourism industry up to 2020 relying upon the continued success in terms of annual visitors, length of stay and daily expenditures.

Without master plan implementation			
	Compound Annual Growth	Present (2007)	Future trends (by 2020) Without master plan
Tourist expenditure in Belize	12.8%	BZE\$ 585,3 million	Approx. BZE\$ 2.5 billion
<b>Overnight tourist visitors</b>		<b>251,400</b>	<b>350,000</b>
- United States	3.2%	152,569	240,000
- Europe		34,175	12,000
- Canada		16,655	80,000

These figures correspond to the calculation of projected trends without an effective implementation of a master tourism plan for Belize and will serve as a basis for comparisons between the future without and with prospective impacts from the proposed master plan. The measures for success proposed in the master plan are intended to generate increases in overnight visitors, length of stay, amount of expenditure and overall tourism receipts, while maintaining an emphasis on sustainable tourism.

The potential strategies for increasing overall annual tourist receipts in Belize adopt approaches from different routes to success in the tourism industry. In order to identify the most appropriate and most effective strategy, T&L analysed different scenarios representing the overall changes in tourist receipts resulting from the change in variables per strategy, such as “aggressive promotion”, “quality improvement”, “product development and diversification”, “integral development” and the “focused market strategy”.



Strategy Impact Comparison				
Strategy	Compound Annual Growth	Projected Tourist Receipts 2020 (BZE\$)	Additional Receipts Over Baseline 2020 (BZE\$)	Cumulative Receipts Over Baseline 2007-2020 (BZE\$)
Aggressive Promotion	9.3%	1,850 million	1,189,000	6,816,000
Quality Improvement	8.2%	1,630 million	962,000	9,275,000
Product Development and Diversification	1.4%	703 million	37,500	378,910
Integral Development	19.6%	5,970 million	5,302,000	29,861,000
Focused Markets:				
United States	7.5%	1,490 million	825,460	4,635,000
Europe	3.8%	948 million	281,700	1,440,900
Canada	2.6%	814 million	148,690	701,280

Ultimately, within the available resources, the most effective strategy would be an integral development strategy that seeks to address all components of tourism receipts. With a projected 19.9% annual growth from this strategy, working to increase the volume of visitors, the quality of tourism products, and the availability of diverse activities would do the most to improve Belize as a destination and subsequently bring in the most annual tourist receipts.

#### 4. Tourism Quality and Sustainability Analysis

The scope of the TVC consists of all the services involved in creating the visitor's experience, and describes the general situation of its operators. Therefore, TVC is a transversal value chain where every single chain unit can also be analyzed as part of a separate activity or value chain.

The Tourism Value Chain (TVC) of the tourism activities refers to each stage of the visitor's journey, starting from the booking of the trip to the final range of services that creates the visitor's experience at the destination.

The scope of the value chain consists of all the services involved in creating the visitor's experience, and describes the general situation of its operators.

Travel organization and booking	<ul style="list-style-type: none"> <li>Either in the visitor's home country or in intermediate destinations</li> <li>This value chain unit is the only one operated at the visitor's origin, before starting his trip</li> </ul>
Transportation	<ul style="list-style-type: none"> <li>Composed of all means of transport to reach or leave the destination, or to distribute the visitors within the area. This value chain unit operates within the final destination as well as with the visitor's original country</li> </ul>
Accommodation	<ul style="list-style-type: none"> <li>In the accommodation value chain in Belize, there are five main types of operators: hotels, resorts, lodges, guesthouses and bed &amp; breakfasts</li> </ul>
Food & Beverage	<ul style="list-style-type: none"> <li>Provision of gastronomic products for visitors, mainly in bars &amp; restaurants (in hotels as well as independent businesses) serving both local and international food</li> </ul>
Handicraft and souvenir shops	<ul style="list-style-type: none"> <li>Handicraft and Souvenir shops are characterized by selling Belizean music and crafts focused on flora and fauna, landscapes, seascapes and ethnic groups (wood crafts, slate carving, etc.)</li> </ul>
Tourism assets	<ul style="list-style-type: none"> <li>Mainly operated by institutions, either public or private, which manage protected areas, reserves, museums, heritage areas, etc.</li> </ul>
Leisure activities	<ul style="list-style-type: none"> <li>Tour guides, excursions, shows and events for tourists make up this chain unit</li> </ul>

Belize's tourism industry is composed of a great variety of operators with many different transport operators, tourism establishments, restaurants, tourism assets and leisure activities.

Some relevant GAPs have been identified from the TVC analysis in Belize tourism sector:

- ▶ **Transportation:** No good international flight connections to Belize, but good domestic air connections within Belize.
- ▶ **Accommodation:** Lack of quality in tourism services and facilities and lack of international standard hotels. Accommodation facilities are in general small since they are family-run hotels and guesthouses. Big-size hotels are highly concentrated in Belize City, and most other international standard accommodation is concentrating in Ambergris and Placencia.
- ▶ **Food & Beverage:** Lack of international restaurant facilities and small number of good quality establishments.
- ▶ **Handicraft:** Lack of handicraft shops and commercialization of traditional products
- ▶ **Leisure activities:** Lack of leisure activities supply
- ▶ **Tourism assets:** Lack of preservation, use and management of the tourism assets. The number of visits to tourism assets is determined by their accessibility and location, leading to low numbers of tourism visits to some of the most attractive tourism assets, but high in those easily accessible by particularly cruise visitors.

Other GAPs that affect the whole value chain have been identified such as lack of technical skills to service tourists and to meet their expectations

- ▶ The level of linkage within the tourism value chain is low for the following reasons:

- Low levels of cooperation in the fields of activity encourage tourists to increase their activities in the tourism value chain, through such actions as mutual distribution of promotional material or collaboration agreements.
- Lack of awareness in some fields about hosting tourists, mostly in transportation, food and beverage and handicrafts; these fields host mainly local guests and a low rate of tourists, consequently they are not involved in the tourism industry and they have low cooperation with the other tourism fields of activity such as accommodation, leisure activities and tourism assets.

#### 4.1 Sustainable tourism issues

The social-cultural and environmental assessments will analyse the destinations' environmental and social components to identify measures for safeguarding of cultural and natural assets of Belize. These assessments provide a baseline for the rest of the project and tasks coming up.

##### 4.1.1 Environmental assessment

From a detail environmental assessment of each district that was undertaken within the project, the most relevant gaps Belizean districts are experiencing are:

##### *Belize City*

- ▶ The largest environmental challenge facing the city is that of solid waste management. Improperly stored garbage and illicit dump sites throughout the city are eyesores and have often drawn negative comments by visitors.

##### *Ambergris*

- ▶ Dredging on the windward coast is supposedly severely restricted because of the potential impacts this activity could have on the reef system, but it continues to be a huge problem. The wave action caused by the increased depth of shoreline water due to illegal dredging can severely erode the nearby coastline especially during tropical storms and hurricanes.
- ▶ Beach erosion, although a natural phenomena, has accelerated in recent time and is attributable to numerous causes —mainly those of man's activities in various forms such as the clearance of mangroves, the reclamation of land from the sea, seawalls, the construction of piers, and the dredging of sand offshore, all of which affect the littoral drift and the consequent shift and deposition of sand.
- ▶ Mangroves can be considered as one of the most important ecosystems on Ambergris Caye for several reasons. Despite the significant importance that mangroves have on the environment, they are rapidly being cleared to make way for new mega - developments. Sea walls are often put up in their absence, in an attempt to prevent erosion, but with little effect.
- ▶ A UNESCO report raised special concern on the Bacalar Chico Marine by stating it is "poorly protected and that there is no clear recognition and understanding of the management implications... and should be considered for immediate inscription on the list of World Heritage in Danger".

##### *Placencia*

- ▶ Placencia's development is not presently guided by any zoning plan or master plan.

- ▶ Waste water discharge and the potential for pollution of the recreational waters and the Placencia Lagoon is a major issue to be considered as part of the future development of the area.
- ▶ The improper disposal of solid waste can have negative impacts to surrounding Caribbean Sea and the recreational waters of Placencia. Many substances in common domestic waste have the potential to negatively affect the environment because of their chemical properties.
- ▶ Beach erosion as a result of coastal structures and developments is always a major issue to consider in Placencia.
- ▶ The clearance of mangroves on the lagoon side and their reclamation with material from the lagoon to allow for developments has raised concerns among some of the NGOs and more vocal elements of the society. Some are concerned on the impacts these activities are having on manatee populations that visit the lagoon.
- ▶ Dangriga has no centralized sewage collection and treatment system. Domestic waste water is treated by means of traditional septic tanks and soak-aways. In certain instances grey water is discharged directly into public drains.
- ▶ Solid waste management and the control of littering is one of the major challenges facing Dangriga.

### *Cayo*

- ▶ San Ignacio, as is the case of other towns, does not have a centralized sewer system. All domestic waste water is discharged into septic tanks and soaks ways.
- ▶ The towns of San Ignacio and Santa Elena have made significant effort to address issues associated with littering. However, there remain hot spots, primarily in open lots that are being used as illicit dumpsites.
- ▶ The burning of garbage as a means of management of the dumpsite has become an environmental health concern.

### *Corozal*

- ▶ There is no separation of the solid waste. Garbage burning is also common, but because the dumpsite is away from any populated area, environmental health concern is not considered a priority.
- ▶ It should be noted that with the advent of “disposable plastic containers” there has been an increase in road side littering.
- ▶ The town is not serviced by a sewage system and depends on individual cement septic tanks and soak-away pits or leach-fields. Grey water is often discharged into the soak ways with some discharging occurring directly into open drains. The concern has always been ground water contamination due to the porous limestone base.

### *Orange Walk*

- ▶ Environmental issues are key elements to be considered, since the most visited cultural attractions of Orange Walk by cruise tourists are already taking the risk of serious deterioration
- ▶ Many illegal dump sites outside the town’s boundaries that may be due to lack of a vehicle to get to the town dump, lack of civic pride, or lack of collection service.

- ▶ Liquid waste disposal is unregulated and consists of septic tanks and some pit latrines in the outskirts of town.
- ▶ The industry discharges its liquid waste into a leach field area which eventually discharges into the river.
- ▶ There have also been several instances of fish kill in the New River; the real causes have been attributed to several environmental factors in which liquid waste pollution may have played a role.
- ▶ In both the solid and liquid waste problems faced by the town, it could be argued that lack of planning and management led to poor siting of housing and on-site waste treatment systems, such as development in flood-prone areas.

#### *Punta Gorda*

- ▶ The garbage is not being crushed/compacted before deposited at the dump site and due to this practice and high rainfall PG has one of the highest incidences of mosquito infestation and by extension a high possibility of increase in malaria and dengue cases.
- ▶ Like the rest of the other towns, PG is not serviced by a sewage system and depends on individual cement septic tanks and soak-away pits or leach-fields. Grey water is often discharged into the soak-aways with some discharging occurring directly into open drains. The concern has always been ground water contamination and the bay.
- ▶ Another phenomenon affecting PG is the washing up on their coastline during heavy rains of tons of garbage.

Major environmental threats and considerations the industry should highly consider are:

#### *Cruise Ship Tourism*

A major challenge to the tourism sector is posed by the explosive expansion of the cruise ship industry in Belize. It is estimated that current tourist arrival figures of 800,000 tourists (mainly cruise ship passengers) generate close to 7 per cent of the total solid waste generated in all of Belize. This estimation illustrates just one dimension of the country's vulnerability to mass tourism.

Another area of concern has been the mass visitation of cruise ship tourist to reefs, protected areas and archaeological sites perhaps surpassing the carrying capacities of several of these sites. A study conducted by INCAE provides indications of environmental damage by cruise tourism, especially to the marine areas visited.

#### *Vulnerability to Natural Hazards and Climate Change*

Belize has over the past years experienced the effect of several hurricanes, storms and flooding. Its vulnerability comes from the increased risks associated with the increase in frequency and intensity of tropical storms and hurricanes predicted as a result of climate change. In addition, rising sea levels pose risks for flooding, inundation, saltwater intrusion, and erosion, which threaten water supplies, infrastructure, and coastal areas. Warmer sea water threatens the coral reefs along the coast of Belize that comprise the longest barrier reef in the western hemisphere and attract thousands of tourists for recreational activities.

### *Offshore Petroleum Exploration and Other Developments*

Recently much concern has been expressed by members of the Belize Tourism Industry Association on the licenses issued by GOB for offshore oil exploration. This concern follows the incident involving BP's Gulf of Mexico oil spill. Much concern has focused on the devastating impacts an oil spill could have on Belize's very sensitive marine ecosystem whereby it would destroy the tourism and fishing industry and by extension the entire Belizean Economy. Concerns have been expressed on our institutional weaknesses to monitor the industry properly to ensure that the companies comply with the highest international standards required of the industry.

### *Increasing Level of Poverty and Economic Recession*

With a recent poverty level of 43% and a slow economic growth rate while experiencing a population growth rate approaching 3.7% per annum, there is a serious need for action to be taken to ensure economic growth and the creation of employment opportunities. At a time when the country faces increased environmental degradation primarily associated with the expansion of agriculture, housing and tourism, the current economic situation poses even greater challenges in maintaining a healthy environmental and natural resource base. In a country with high poverty levels, and relative natural resource abundance, **environmental degradation and human deprivation are closely linked.**

#### **4.1.2 Socio-cultural assessment**

Approximately 350,000 people live in Belize, whereby 29% live in Belize District. About the half of the population live in two cities and seven towns, and the other half lives in rural areas. Belize has a large range of ethnic groups: Mestizo 48.7%, Creole 24.9%, Maya 10.6%, Garifuna 6.1%, other 9.7% (in 2000) and religions: Roman Catholic 49.6%, Protestant 27% (Pentecostal 7.4%, Anglican 5.3%, Seventh-Day Adventist 5.2%, Mennonite 4.1%, Methodist 3.5%, Jehovah's Witnesses 1.5%), other 14%, none 9.4% (2000). Its social diversity means that it is a multi-language destination mainly speaking Spanish, Creole and Mayan dialects.

To take socio-cultural aspects into account, or to be applicable in a tourism development and master planning process, the following specific areas were analysed: San Ignacio, Belize City, Ambergris Caye and Placencia.

#### *San Ignacio Town*

In San Ignacio, the level of community spirit and cohesion is very good in relation to its support for the tourist industry. This is mainly due to the municipality (along with the surrounding rural communities) and the path over the last two decades to move towards the development and promotion of eco-tourism which has now become one of the mainstays of the local economy and a major source of employment opportunity for the local population. San Ignacio has a very cosmopolitan population which promotes the Mestizo, Creole and Maya cultures in all its forms: eg food, festivals, music etc.

#### *Belize City*

There is significant support to the tourist industry by the local population of Belize City. It is one of the main sources of employment for a wide range of businesses particularly the small business people selling their crafts, food, or engaged in the provision of services including tour-guide and taxi services.

One major concern of the city is a relative high level of criminality. The level of homicide and burglaries has shown a steady increase over the past 4 to 5 years with the bulk concentrated in the south-side constituencies. Belize City has the highest



crime rates among the seven municipalities in the country (while it is highest in Belize City this is an issue for the entire country, especially where tourism is involved).

#### *Ambergris Caye*

The native population of Ambergris Caye is primarily comprised of Mestizo along with small representations of all the other ethnic groups in the country including the Creole, Garifuna, Maya and others. The bulk of the population is concentrated primarily in and around the town of San Pedro located near the southern coast. Local home owners have developed a fairly successful hotel/motel industry based on the development and expansion of their homes to accommodate over-night tourists. Transporting visitors to and from the island has become a lucrative business for local residents.

The community spirit and cohesion on this island is very strong particularly as it relates to the tourist industry since this industry has now become the “back-bone” of its economy. As mentioned above, the shift from depending primarily on fishing to tourism has been gradual over the past two decades, but has resulted in marked improvement in the quality of life for its residents. In addition, there was a recent controversy in the community sparked by a sharp increase in the incidence of crime on the island, and which resulted in allegations of racism being practiced by the local authorities of the Town Council through the use of racial profiling.

#### *Placencia*

The local population mainly comprises a mixture of Mestizo and Creole with small representations from all the other ethnic groups in the country such as the Garifuna, Maya, East Indians, and Asians etc.

The level of community spirit and cohesion seem to be very strong particularly in relation to the tourist industry which has now become the mainstay of the local economy. Local population is engaged in various aspects of the tourist industry such as tour-guides, restaurants, diving instructors, craft vendors, small hotel operators, etc. A major concern of Placencia is the issue of sexual exploitation and illegal trafficking of women and under-aged girls to these destinations from neighbouring countries

The neighbouring provinces are rich in cultural resources of Garifuna and Maya communities of Seine Bight, Maya Centre, Santa Rosa and San Roman each with their distinctive cultures which are attractive to tourists. It should be noted that these communities still practice their customs and traditions.

## **4.2 Competitiveness analysis**

This section identifies critical intervention areas for the improvement and enhancement of Belize’s tourism sector competitiveness.

In order to understand and analyse Belize’s competitiveness compared to its competitors, four broad categories were considered – the regulatory framework, business environment & infrastructure, resources and tourism commercialisation - with various sub-indexes. The market competitiveness analysis calculates specific indicator variables and provides the Country Competitiveness Index (CCI), which makes a comparison between competing destinations possible.

When Belize’s CCI > 1 → stronger When Belize’s CCI = 1 → equal When Belize’s CCI < 1 → weaker
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<sup>2</sup>Thus a CCI higher than 1 in a given area means that Belize is strong in that area while a CCI below 1 identifies an area of weaknesses which requires improvements.

#### *Regulatory and Institutional Indicators*

Regulations and institutional frameworks are crucial as they ensure the enforcement and maintenance of a desirable tourism destination.

Compared to the competing countries, Belize:

- ▶ Lags behind in investment level and ease of starting a business
- ▶ Has significantly higher per capita CO<sub>2</sub> emissions, but a lower number of endangered species, although it also has a lower quantity of species overall
- ▶ Remains relatively on par in terms of health and hygiene

Policy & Regulation						
	Belize	Costa Rica	Guatemala	Nicaragua	Panama	Belize CCI
Foreign Direct Investment 2006 (% GDP)	6.01	6.61	1.00	5.33	15.06	<b>0.86</b>
Time Required to Start a Business 2008 (days)	44	60	26	39	12	<b>0.78*</b>
Environmental Sustainability						
	Belize	Costa Rica	Guatemala	Nicaragua	Panama	Belize CCI
Per capita CO <sub>2</sub> emissions 2006 (metric tons of carbon)	2.84	1.93	0.96	0.78	2.01	<b>0.50*</b>
Number of Endangered Species 2010	89	256	233	115	329	<b>2.62*</b>
Health & Hygiene						
	Belize	Costa Rica	Guatemala	Nicaragua	Panama	Belize CCI
Physicians 2000-2007 (per 10,000 population)	11	13	9	4	15	<b>1.07</b>
Hospital Beds 2000-2008 (per 10,000 population)	12	13	7	10	22	<b>0.92</b>
Population With Access to Improved WaterSources 2006 (%)	91	98	96	79	92	<b>1.00</b>

#### *Business environment & infrastructure indicators*

Compared to the competing countries, Belize:

- ▶ Falls short in terms of its road infrastructure
- ▶ Has moderate communication infrastructures
- ▶ Shows an incredibly high percentage of capital investment in tourism, but still falls very short in the number of hotels

Transportation Infrastructure						
	Belize	Costa Rica	Guatemala	Nicaragua	Panama	Belize CCI
Roads Paved 2000 (%)	17	22	34.5	11.1	34.6	<b>0.67</b>
Communication Infrastructure						
	Belize	Costa Rica	Guatemala	Nicaragua	Panama	Belize CCI

<sup>2</sup> Note: It is important to recognize through all of these competitiveness ratings that Belize faces a vast disadvantage in comparison with Costa Rica, Guatemala, Nicaragua, and Panama since it is a much smaller and less populated country. In fact, the computed CCI for each of these variables shows that Belize has a competitiveness index in land mass of 0.25 and a competitiveness index in population of 0.05. Low competitive ratings in the variables analyzed should be viewed with these disadvantages in mind.

Cellular subscribers 2007 (per 100 population)	41.12	33.76	76.01	37.88	90.05	<b>0.69</b>
Internet Users 2006 (per 100 population)	10.91	27.61	10.22	2.77	17.35	<b>0.75</b>
Telephone Lines 2006 (per 100 population)	12.48	30.22	10.49	4.43	14.85	<b>0.83</b>
<b>Tourism Infrastructure</b>						
	<b>Belize</b>	<b>Costa Rica</b>	<b>Guatemala</b>	<b>Nicaragua</b>	<b>Panama</b>	<b>Belize CCI</b>
Share of Capital Investment in Tourism 2009 (as a % of total fixed investment)	26.2	13.5	9.4	6.8	13.7	<b>2.41</b>
Absolute Capital Investment in Tourism 2009 (US\$ billion)	0.08	0.95	0.593	0.128	0.87	<b>0.13</b>
Number of Hotels 20087	620	2599	2640	503	462	<b>0.40</b>

### Resources Indicators

Compared to the competing countries, Belize...

- ▶ Employs a relatively high percentage of its work force in the travel and tourism industry, but has room for improvement with its literacy rates and national unemployment
- ▶ Currently does not host an UNESCO cultural world heritage site
- ▶ Has a larger number of known mammal species
- ▶ Has fewer protected marine areas,
- ▶ Has a smaller number of known plant species
- ▶ Offers fewer UNESCO Natural Heritage sites

<b>Human Resources</b>						
	<b>Belize</b>	<b>Costa Rica</b>	<b>Guatemala</b>	<b>Nicaragua</b>	<b>Panama</b>	<b>Belize CCI</b>
Travel & Tourism Employment 2009 (% work force)	28.8	14	6.8	6.1	13.1	<b>2.88</b>
Travel Agents 2009	192	366	678	22	219	<b>0.60</b>
Life Expectancy at Birth 2009 (years)	73	79	70	71	75	<b>0.99</b>
Unemployment Rate (most recent data)	8.50%	5.60%	3.20%	3.90%	6.30%	<b>0.56*</b>
Primary School Completion Rate 2007 (%)	103.6	89.1	76.5	73.4	94.5	<b>1.24</b>
Secondary School Net Enrolment 2006 (%)	67	64	38	43	64	<b>1.28</b>
Adult Literacy Rate (%)	70.3	95.9	73.2	78.0	93.4	<b>0.83</b>
<b>Resources Indicators- Cultural Resources</b>						
	<b>Belize</b>	<b>Costa Rica</b>	<b>Guatemala</b>	<b>Nicaragua</b>	<b>Panama</b>	<b>Belize CCI</b>
World Heritage Cultural Sites 2010	0	0	2	1	2	<b>0.00</b>
<b>Resources Indicators- Natural Resources</b>						
	<b>Belize</b>	<b>Costa Rica</b>	<b>Guatemala</b>	<b>Nicaragua</b>	<b>Panama</b>	<b>Belize CCI</b>
Marine Areas Protected 2008 (sq km)	2409	3067	338	4479	6275	<b>0.68</b>
World Heritage Natural Sites 2010	1	3	1	0	3	<b>0.57</b>
Number of Known Mammal Species 2004	633	477	594	777	483	<b>1.09</b>
Number of Known Plant Species 2004	2,894	12,119	8,681	7,590	9,915	<b>0.30</b>

### Tourism commercialization indicators

Compared to the competing countries, Belize:

- ▶ Lacks competitiveness in terms of visitor numbers and receipts
- ▶ Invests an extensive amount of its funds and resources in the tourism industry

### Strength of Tourism Industry

## Executive Summary · Diagnostic of the Tourism Sector in Belize

	Belize	Costa Rica	Guatemala	Nicaragua	Panama	Belize CCI
Overnight Visitor Arrivals 2009 ('000)	229.8	1917.3	1522.1	931.5	1250.5	0.16
All International Arrivals 2009 ('000)	934.9	2228.4	1683.6	1189.5	1576.9	0.56
Tourism Receipts 2009 (US\$ million)	177.7	1,977.8	1,298.0	345.9	2,269.0	0.12
Government Support						
	Belize	Costa Rica	Guatemala	Nicaragua	Panama	Belize CCI
Government Tourism Expenditure 2009 (US\$ billion)	0.03	0.295	0.163	0.03	0.13	<b>0.19</b>
Government Tourism Expenditure 2009 (% Total Spending)	12.3	6.1	4.6	2.1	4.8	<b>2.80</b>

Based on the CCI approach, the following strengths and weaknesses can be defined:

▶ **Strengths**

- Tourism government expenditure
- Percentage of labour force employed within tourism
- Capital investment in tourism

▶ **Weaknesses**

- A high unemployment rate
- High CO2 emissions per capita
- Low market share of visitor arrivals
- Weak level of marketing and commercialisation

Overall, Belize's Average Comparative Competitiveness Index was 0.91, putting it only slightly behind its competitors. In light of its relative size and population, Belize's competitiveness score demonstrates an immense amount of potential for the competitiveness of its tourism industry.

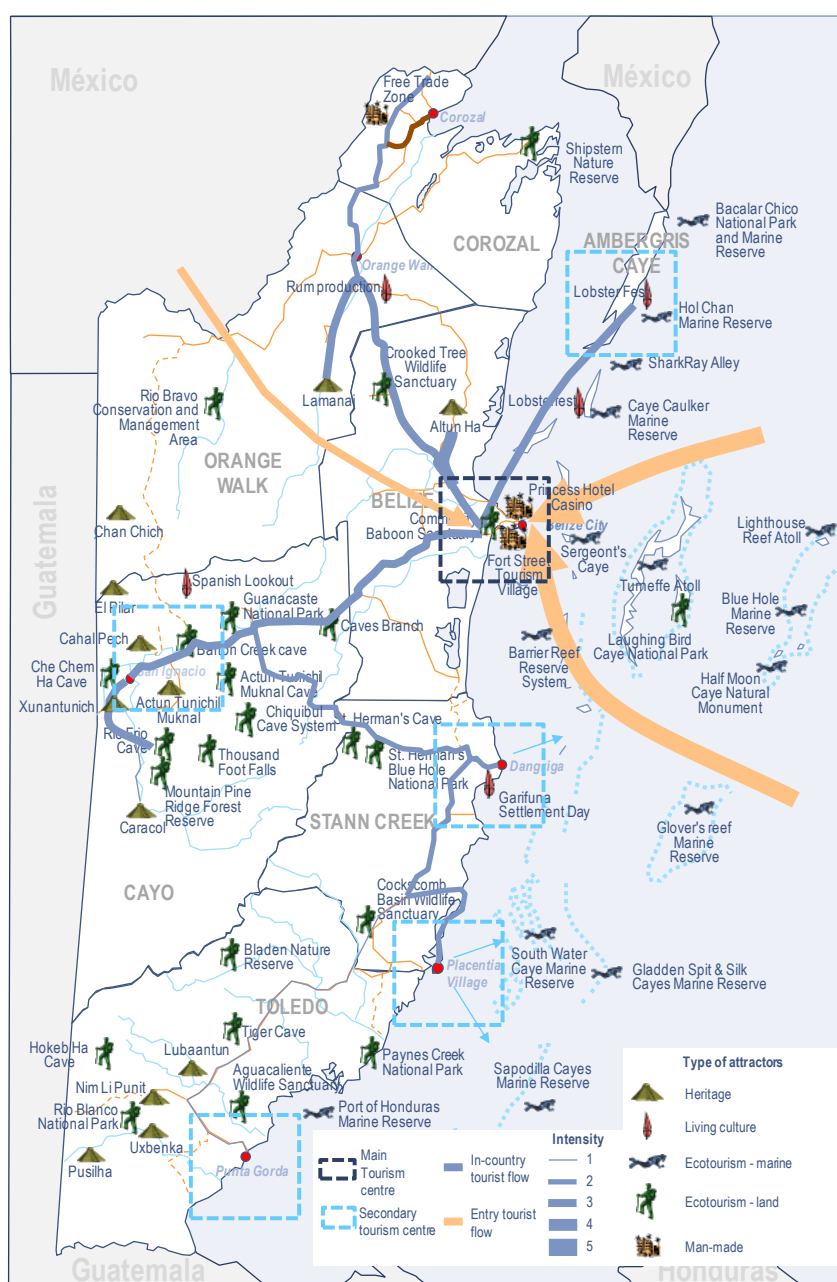
## 5. Tourism Destination and Infrastructure Analysis

### 5.1 Belize tourism destination structure

Belize's structure as a tourism destination has one main centre or hub where most tourists reach before getting to other destinations within Belize. Those destinations acting as secondary tourism centres are Ambergris, San Ignacio, Placencia and at a lower grade Punta Gorda and Dangriga.

As the map below is presenting, inbound tourism flows arriving to Belize City are mostly by cruise or by air. The most visited destinations in Belize that receive both cruise visitors and overnight tourists are North Belize City, Ambergris and Cayo.

All other destinations cater basically overnight tourists and do not receive cruise visitors since they are too far to be reached in one day, such as Placencia, Dangriga and Punta Gorda.



### *Belize District*

Belize district pulsates with an infused mix of old-world charm and modern comfort including relevant tourism assets such as the Maya temples of Altun Ha; the magnificent Jabiru storks at Crooked Tree Wildlife Sanctuary.

Belize City is best known as the cultural and business epicentre of Belize, as well as a doorway for cruise passengers to the country's offering of diverse adventures. Belize City offers a variety of cultural and historical centres, colonial architecture and excursions. It is also the commercial centre of the country where the country's largest hotels are found offering conference facilities, professional services, as well as restaurants, bars and nightlife.

Belize district in terms of tourism is characterized by the following features:

- ▶ Belize City tourism facilities (hotels, restaurants, bars, nightlife, etc.) are limited and lack the required quality considering the fact it is the largest city in the country and the main arrival and departure point for tourists.
- ▶ Non-existence of proper leisure services in Belize City, such as shopping malls, entertainment complexes, theme parks, etc. that would clearly diversify tourism supply in Belize especially for cruise visitors. Lack of designated anchorage sites and inadequate city cruise tourism infrastructure.
- ▶ Belize City is deprived of green areas and has very limited recreational areas. Parks and public open spaces are relatively small and lack adequate amenities.
- ▶ Lack of organization concerning vehicular and pedestrian circulation leading to conflicts and making pedestrians feeling uncomfortable.
- ▶ Land connectivity is in general good on primary roads, but secondary roads lack quality and these are the roads usually taken to the district's tourism assets.
- ▶ The impact of cruise tourism on Belize district heritage sites, which is gradually changing the characteristics of visits to popular cruise tourism sites from cultural experiences to mass tourism experiences.

### *Ambergris*

At 36 miles long, Ambergris is the largest of the cayes in Belize. Located in the northern-most waters of the country, three-quarters of a mile west of the Belize Barrier Reef, the island is surrounded by prominent dive and snorkel sites, including the Hol Chan Marine Reserve and Shark Ray Alley. San Pedro, the main city of Ambergris, is an historic city with a blend of restaurants, shops, bars, boutique hotels, and condominium complexes and at the same time the busiest visitor destination in Belize. However, it retains its relaxed atmosphere and is far from the glitz and noise of a city.

A few miles from Ambergris, Caye Caulker offers a range of accommodation from budget-friendly hotels to small full-service resorts, along with excursions for all types of vacationers.

Ambergris is characterized by the following features:

- ▶ The increased population of San Pedro, as well as the increasing number of tourists, has caused the environment in and around Ambergris Caye to be increasingly impacted by pollution.
- ▶ Poor road conditions continue to be of great concern to the residents and tourists of Ambergris Caye.



- ▶ Reliance upon golf carts and pedestrian circulation lacking in organization. Further control is required of bigger vehicles which are now starting to dominate the streets.
- ▶ Low cost housing, environmentally destructive dredge and fill areas still underway, and the general lack of visual interest on the bay have kept that side of town depressed.
- ▶ The landscape of the island is gradually being transformed, due to the fact that higher intensity development (G+2 and taller structures) has been produced throughout the island, and it has not been kept in defined zones.
- ▶ The windward coast of Ambergris Caye is clustered with piers and jetties that are used for loading and unloading purposes which increase vulnerability to serious beach erosion, navigational safety hazards, fire peril, and visual pollution of the island frontage, not to mention the obstruction of public use of the beach.
- ▶ Infrastructure problems of paving drainage, water supply and wastewater treatment
- ▶ Fresh groundwater on Ambergris Caye is limited to a thin water lens that is perched atop the saline water level.

#### *San Ignacio / Cayo*

San Ignacio is a vibrant, interior town that serves tourists as an attraction in itself, as well as a base camp for visits to the surrounding antiquities and natural areas. The scale of the downtown area and the historic character of much of the architecture reinforce the attractiveness of the town for tourism. The town serves as a base from which to explore pine forests, clear rivers, rocky plateaus, ceremonial caves, towering mountains, cascading waterfalls and ancient Maya temples. Throughout the countryside there are accommodation options ranging from elegant jungle lodges through to the more basic amenities of a small resort or campsite.

San Ignacio/ Cayo are characterized by the following features:

- ▶ There is a serious need to remedy the open and inadequate storm drainage system complicated by the (pleasantly) varied topography.
- ▶ Lack of public spaces where leisure activities such as restaurants, bars and special events could take place. Strong need to develop entertainment and leisure services.
- ▶ Lack of a tourism visitor centre in San Ignacio where tourists could get information and data about tourism products and packages to main Cayo assets.
- ▶ Lack of a good road network facilitating access to main tourism sites, and particularly nature and culture assets (i.e. Caracol)
- ▶ Only part of the cultural heritage in Cayo is open to tourism since most of it still remains covered and unexcavated.
- ▶ Certain grade of insecurity on the access to Caracol ruins due to the proximity of the Guatemalan border.
- ▶ Even though an air strip is available, Cayo lacks air connectivity within the country and from other relevant Maya sites within the region.

#### *Placencia / Stann Creek*

Situated on a slender peninsula that curves alongside the southern coast of the country, Placencia is the only place on mainland Belize that offers white sand beaches.

There are many full service, up-market hotels, private homes and condominiums with a range of services including spas, marinas and fine dining as well as tours for diving,

snorkelling, fishing, archaeological, cultural and rainforest experiences. Unlike Ambergris, this coast line is not heavily populated by docks and piers. Water quality of the sea is generally good, but sensitive to wave action and sedimentation.

Most of this land is low in elevation, and development of any intensity will require mitigation of environmental conditions and potential destruction of mangrove areas.

The Placencia Peninsula is on the verge of the most significant changes in its history. At the north end there is a new airport under construction, which can handle intercontinental passenger jets. A resort development designed to American standards by Americans is under construction, and this is the highest intensity development in Belize.

Placencia/ Stan Creek are characterized by the following features:

- ▶ Lack of Proper Planning since Placencia's development is not presently guided by any zoning plan or master plan. Environmental concerns are raised when looking at the strong development Placencia is and could be suffering.
- ▶ Lack of proper quality of the tourism facilities located in Placencia Village
- ▶ Beach erosion as a result of coastal structures and developments is always a major issue to consider in Placencia
- ▶ Even though the road has been upgraded recently, there is an under capacity of bridges on the road accessing the Peninsula from Belmopan. Frequent heavy rains during the rainy season produce flooding that hinder the use of bridges by circulating vehicles.
- ▶ Insufficient basic infrastructures to cover current and potential demand, and not enough capacity of energy and water supply services
- ▶ Dangriga provides easy access to many of the beautiful cayes of the south and has ready access to some of the most relevant protected areas like the Blue Hole National Park and Saint Herman's Cave.
- ▶ Dangriga has no centralized sewage collection and treatment system. Domestic waste water is treated by means of traditional septic tanks and soak-aways.

#### *Punta Gorda/ Toledo*

Toledo, 150 miles by road from the capital, Belmopan, is the southernmost administrative district of Belize. Peopled predominantly by indigenous Maya, it has a low population density and settlement patterns. Punta Gorda Town, known locally as P.G., has a population of 5,500 with a mixture of Mopan and Kekchi Maya, Garifuna, Creoles, Lebanese, East Indian and Chinese peoples.

Toledo is itself an emerging destination within Belize and it is home to Belize's only true rainforest coupled with intricate caves, incredible wildlife and some of the most beautiful offshore islands found in Belize.

Toledo/ Punta Gorda is characterized by the following features:

- ▶ Toledo offers an insufficient tourism supply concentrated basically in Punta Gorda and on some resorts throughout the district;
- ▶ Toledo's facilities provide a limited provision of services and are suffering of daily change opening hours without previous notice. In that particular case, there is a lack of tourism/ handicraft shops
- ▶ There is a lack of quality and standards at hotels, except in some particular cases; HR do not cover the grade of service required.

- ▶ Punta Gorda lacks of the charm and beauty a coastal town should have
- ▶ Toledo's connectivity is clearly an issue that needs to be solved since paved roads only reaches Punta Gorda, but all tourism assets need quite a long time to be reached by vehicle due to the bad conditions of Toledo's roads.

### *Orange Walk*

Orange Walk district is home to approximately 16,000 people, primarily descendants of the Mestizo culture, descendants of the Spanish-Maya refugees of the Caste Wars

As the sweet smell of sugarcane permeates the air in the Orange Walk district, the grand Maya temples, primal jungle and exotic birds entice one to explore.

Orange Walk is characterized by the following features:

- ▶ Accessibility to temples remains the main issue to be solved in the following years. Lamanai is presently accessible by boat and vehicle; but while road accessibility is long and uncomfortable, travelling by boat is a fascinating and enriching nature experience.
- ▶ The impact of cruise tourism on Orange Walk cultural sites (Lamanai), which is gradually changing the characteristics of visits to popular cruise tourism sites from cultural experiences to mass tourism experiences.
- ▶ Environmental and social issues are also key elements to be considered along rich cultural assets, since the most visited cultural attractions mainly by cruise tourists are already at risk of serious deterioration.

### *Corozal*

Perched on the northern border with Mexico, picturesque Corozal district blends Mestizo, Maya and Mexican flavours with the allure of a serene haven away from the busier tourist track. Corozal district is also home to the Corozal Free Zone with a hotel, casino and shopping. Charming resorts, comfortable homes and shady parks overlook the inviting waters. Visitors and retirees from Europe and North America mix easily with more deeply rooted locals.

Corozal is characterized by the following features:

- ▶ The Corozal Bay covers 730.5 km<sup>2</sup> and was declared a Wildlife Sanctuary in 1998 for its biodiversity and its healthy population of manatees.
- ▶ Corozal has limited number of tourism assets which are mainly a few nature reserves and several minor Maya temples. However, Corozal's location is extremely privileged since it is located at 1-hour water taxi to Ambergris Cayes, which means it is closer than Belize City.
- ▶ Corozal town has direct ferry connection to Ambergris and thus it could be northern entrance gate to the Cayes. However, a direct ferry connection to Ambergris from Chetumal, the closest city in the Mexican side, is hindering Corozal to be a connecting point to the Cayes. Therefore, tourists remain and take the ferry in Chetumal instead of heading to Corozal.
- ▶ Although the town's sea shore does not have sandy beaches, there are several public areas such as "Miami Beach" where visitors can take a swim, have a picnic, or simply relax.
- ▶ The town has designated parks and public open spaces but lack adequate tourism amenities.

- ▶ The town is not serviced by a sewage system and depends on individual cement septic tanks and soak-away pits or leach-fields.

## 5.2 Infrastructure and transportation analysis

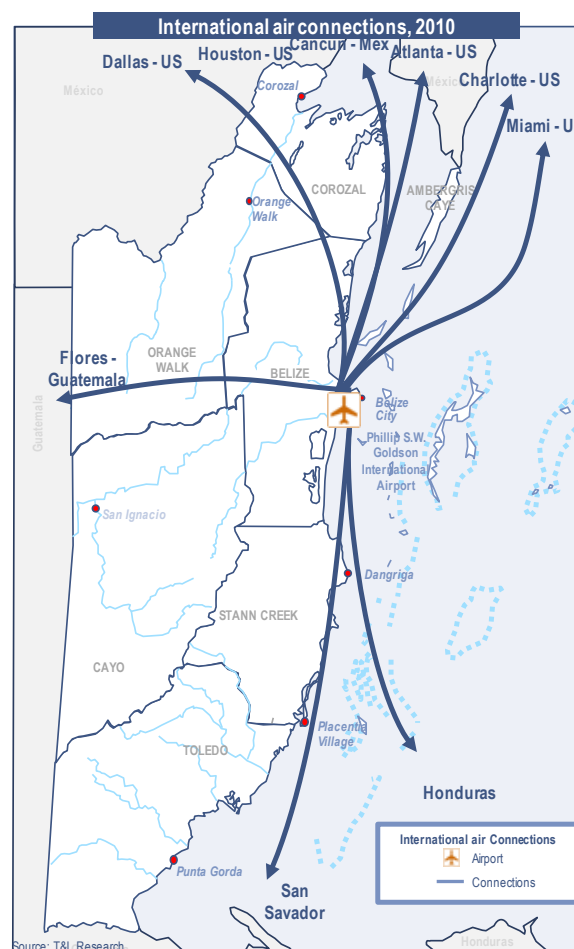
### *Air connectivity*

Air connections are a critical factor for the development of a tourism destination in order to be accessible to the source tourism markets. Currently, Belize has one international airport with a reduced passenger terminal. Flights are presently being operated to the United States and some neighbouring countries such as Guatemala, Honduras and El Salvador.

Some issues regarding Belize's air connectivity and airport facilities should be particularly highlighted:

- ▶ There is an alarming lack of direct connections to Europe and Central America, but also to South America.
- ▶ Belize International Airport, and particularly the passenger terminal facilities, are old and reduced not fulfilling the required international standards to receive tourists. Not enough services are being offered within the passenger terminal, and those given lack the required quality.

A new international airport developed by private stakeholders is under construction in the southern part of the country in Placencia. That new airport could be fostering the tourism sector in the southern part, by promoting destinations such as Dangriga, Punta Gorda and Placencia itself.



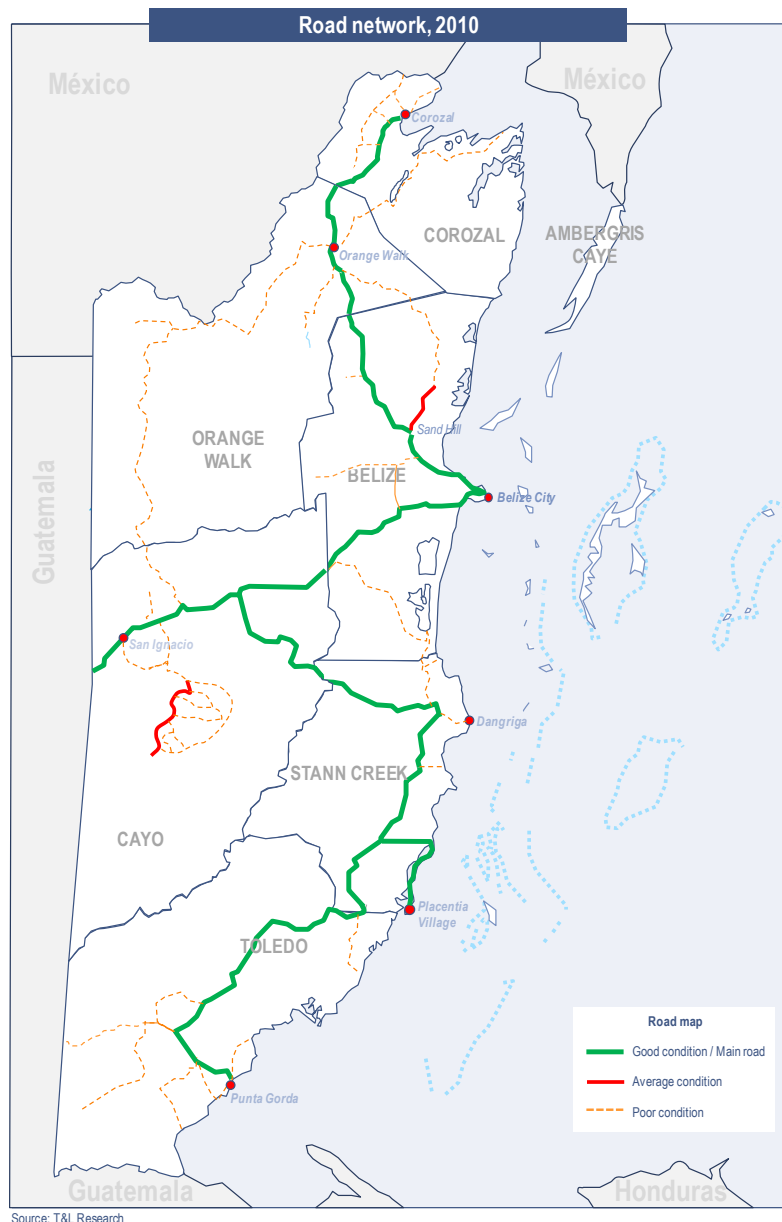
### Land connectivity

Currently, the main road of Belize crosses from North to South connecting with the main cities of Belize. However, connections to certain tourist attractions are only accessible through secondary roads which are mostly not paved requiring a high level of maintenance and improvement.

Some of these challenges are mainly focused on the following issues:

- ▶ Inappropriately surfaced roads leading to floods risk
- ▶ Carrying capacity for all types of transportation
- ▶ Insufficient and inappropriate signage along the routes
- ▶ Lack of physical planning in particular in rural communities in and around tourism sites and destinations

Under these lines, road conditions in Belize require further improvement and maintenance in specific stretches. On a general point of view, road maintenance is recommended for all roads with the aim to improve or maintain conditions and security.

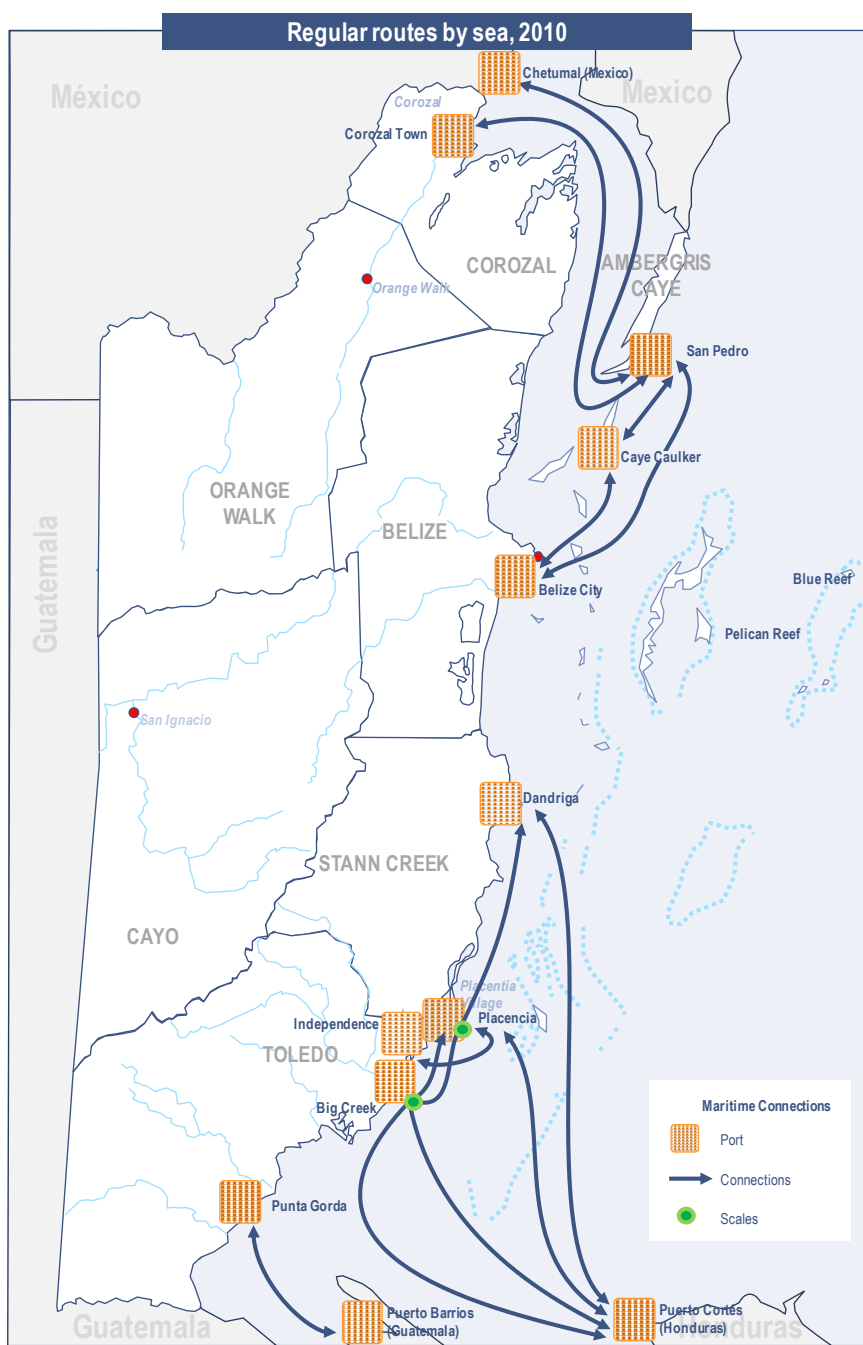


### Sea connectivity

Regular routes by sea in Belize connect the main coastal cities and islands both by ferries and water taxis. Also, there are daily regular routes connecting San Pedro with the Blue Reef and the Pelican Reef. At an international level, there are also come routes that connect Belize's main cities with the neighbouring ports of Puerto Cortés in Honduras, Puerto Barrios in Guatemala and Chetumal in Mexico.

Some of the constraints that need to be faced concerning sea connectivity are:

- ▶ No regular routes connecting northern cities to southern cities of Belize
- ▶ Quality on maritime transport should be improved mainly focusing on safety, schedule performance of ferries and ports services and facilities





## 6. Tourism Product Analysis

The Tourism Product Analysis will identify tourism assets, facilities and services offered in Belize and assess their tourism potential and attractiveness. The tourism facilities and services are analysed by applying the Tourism Value Chain Analysis, which offers a structured analysis format. The assessment of relevant tourism attractions will be the basis for defining Belize's sustainable tourism development strategies.

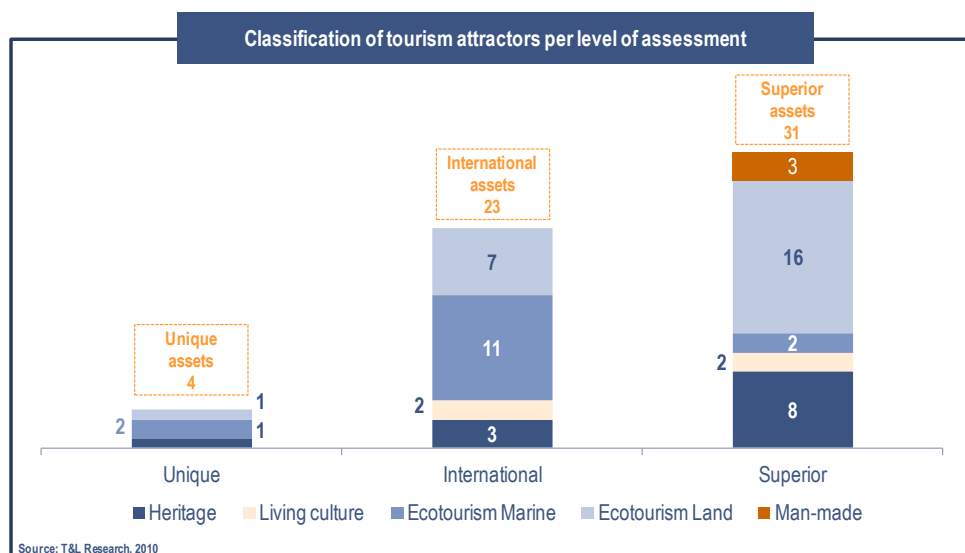
### 6.1 Tourism assets inventory and assessment

Belize is a region which is particularly rich in heritage and cultural assets as well as significant ecotourism-based tourism assets. A wide range of these assets, both cultural and natural, are attractive for international tourism.

T&L identified following 92 main tourism assets per attractor category: 45% of the main tourism assets are classified as **cultural attractors**: 35 main heritage attractors and 6 living culture attractors (mainly festivals). 49% of the tourism assets are **ecotourism natural attractors**: 30 are assets on land, such as natural parks, caves, wildlife sanctuaries and 15 are marine ecotourism assets. Only 7% of the main tourism assets of Belize are **man-made attractors** such as entertainment activities.

Cayo and Toledo Districts are the richest regions within Belize in terms of tourism attractors, whereas Orange Walk and Corozal District are, in this context, the poorest ones. However, despite of having a lower supply of tourist assets, these two districts can be considered as emerging destinations with vast ecotourism areas and biodiversity. On the other hand, in Corozal District the Free Trade Zone is located close to the border with Mexico having great potential to attract tourists coming from the neighbour country. In Cayo District, 24 different attractors were identified, whereas in Corozal District there were only five.

The assessment of attractors in Belize shows a considerable number of attractors with high or potential interest for tourists.



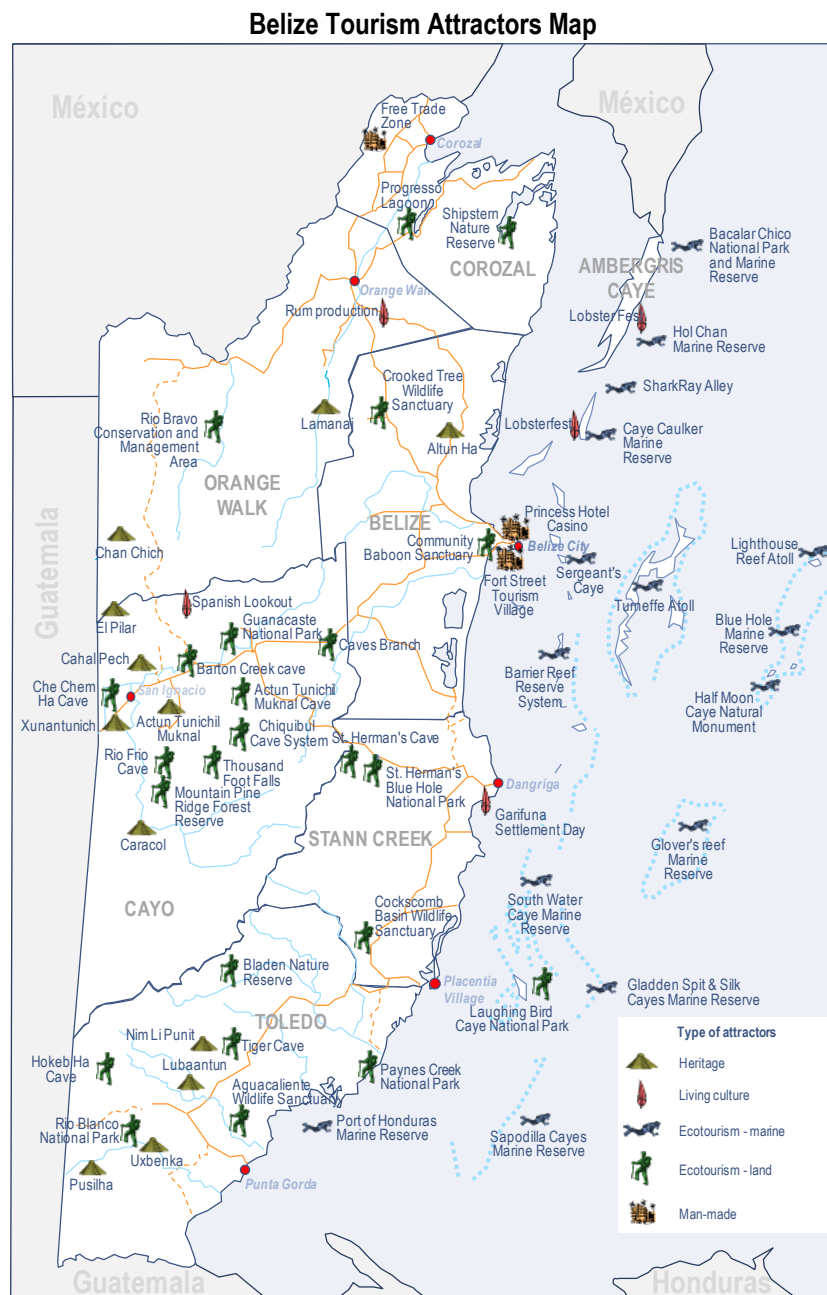
Source: T&L, 2010

T&L identified that **Belize hosts four “unique tourism assets”** with international recognition attracting tourists by themselves. These assets are the Barrier Reef Reserve System, the Blue Hole Marine Reserve being unique of its characteristics in the world, the Caracol Mayan site with a highest level of competition but with special tourism interest and known as the mother of all Belizean Mayan sites and the Chiquibul Caves System hosting a great network of caves in the Chiquibul national park located

in Cayo. The first two assets are classified as Ecotourism marine assets and located off-shore Belize, whereas Caracol and Chiquibul caves system as part of Belizean heritage is located in Cayo district.

23 assets were graded to have **international recognition** and due to their high degree of attractiveness, to have a great potential to attract tourism. 31 tourism assets are classified as “**superior**”, indicating a high potential to attract tourism with a medium degree of attractiveness. With 16 assets being graded as superior or above, Cayo district is the most attractive district within Belize, followed by Toledo (12 assets) and Ambergris Caye/ Off-shore Belize concentrating mostly ecotourism marine assets (10 assets).

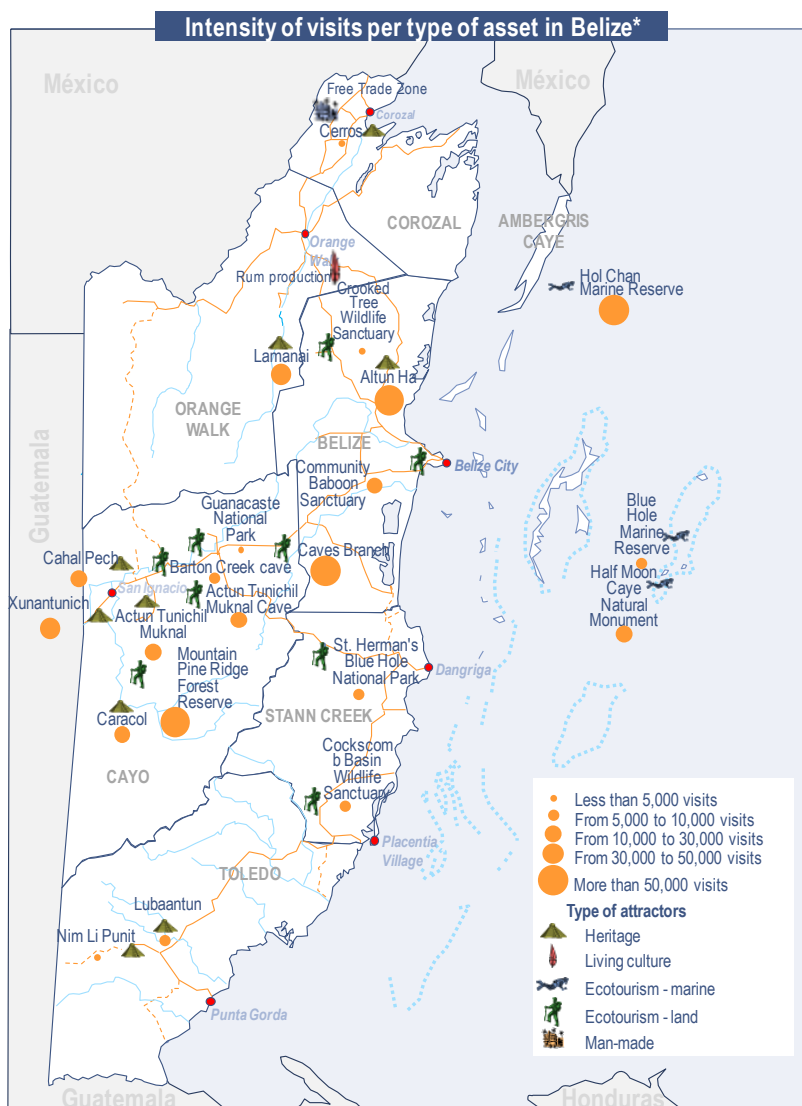
T&L has created the following tourism attractors map for Belize showing the location of the attractors identified for this assessment:



Source: T&L, 2010

The most visited assets are the Caves Branch in Cayo District, Altun Ha in Belize District and Hol Chan Marine reserve in Ambergris Caye. The least visited sites are Guanacaste National Park, Crooked Tree Wildlife Sanctuary and Cerros. On average, 86% of the visits to the assets are generated by foreigners and 14% by locals.

The Belize map that follows has been adapted with the intensity of visits of some tourism assets:



**Source:** Travel and Tourism Statistics, 2008 - Belize Tourism Board

**Note:** Data is not available for all tourism assets; therefore this analysis is based on a certain number of assets, listed in this map

## 6.2 Tourism product offering analysis

This section sets the basis for the future product offering of Belize. First, the current tourism products are identified including their major characteristics and their faced obstacles for a sustainable development. It focuses on the assessment of infrastructure directly and indirectly related to tourism and the way it enables or hinders tourism activities and development in the destination.

Belize offers tourists products for different types of tourism and particularly the most relevant are: cultural, nature & ecotourism, adventure, and cruise.

### *Cultural Tourism*

Cultural tourism is the subset of tourism concerned with a country or region's culture, specifically the lifestyle of the people in those geographical areas, the history of those peoples, their art, architecture, religion(s), and other elements that have helped shape their way of life. Cultural tourism includes tourism in urban areas, particularly historic or large cities and their cultural facilities such as museums and theatres.

Due to Belize's cultural richness in Maya heritage composed of thousands of ruins and indigenous cultures, most cultural tourism products offered are based on festivals and cultural experiences such as Garifuna activities and Mayan dances. Most Maya temples are located in the central area of Belize with most of them reachable in less than 1.5 hours by vehicle. However, accessibility to most temples and remains is modest and is therefore the main issue to be solved. Furthermore, most of the cultural heritage (especially valuable Maya sites) still remains covered and unexcavated.

Belize cultural tourism is characterized by the following features:

- ▶ Rich Maya heritage composed of thousands of ruins, which some of them could be stressed due to its international and unique attractiveness.
- ▶ Most Maya temples are located in the central area of Belize being most of them reachable in less than 1.5 hours by vehicle.
- ▶ Only part of the cultural heritage in Belize is opened to tourism since most of it still remains covered and unexcavated, being particularly relevant at some of the most valuable Maya sites.
- ▶ Living culture is an issue that should be further developed and expanded throughout the year, rather than only being displayed in very specific days of the year coinciding with cultural festivals and events.
- ▶ Belize shares a rich Maya heritage with its neighbouring countries, an issue that could be seen as an opportunity to foster cross-border tourism initiatives with the aim of promoting heritage tourism in the country.

### *Ecotourism / Nature Tourism*

Ecotourism is responsible for travel to fragile, pristine, and usually protected areas. It strives to be low impact and (often) small scale. It is considered to be a specialized typology of tourism involving visits to land and marine nature areas with the aim of discovering, living and feeling its natural environment through activities such as bird watching, discovering wildlife, nature photography, etc.

Belize hosts a world-class reef and caye system that extends the length of the country's 185-mile coastline. Home to 70 types of hard corals and nearly 500 species of fish, it offers a diverse and abundant selection of marine life. 75% of the country is

covered with beautiful tropical rainforest of which 40% is protected. This land is rich in a wide variety of plant and animal species. Certain Nature Parks and Reserves mostly close to the Central Belize area are well prepared for tourists with nature trails, wildlife sightseeing, and facilities. However, those out of this area need further investment for product development. Regarding the accessibility of nature parks and reserves, there are currently many long unpaved roads and some parks still remain inaccessible.

Belize nature tourism is characterized by the following features:

- ▶ A world-class reef/caye/atoll system that extends the length of the 185-mile country's coastline. Diverse and abundant selection of marine life with 70 types of hard corals and nearly 500 species of fish.
- ▶ Certain Nature Parks and Reserves mostly close to the Central Belize area are well prepared for tourists with nature trails, wildlife sightseeing, and facilities. However, those out of this area do need further investment for product development.
- ▶ Except certain particular cases, accessibility is a clear issue that needs to be solved to facilitate access to the broad network of nature parks and reserves in Belize. Presently, accessibility to those present long unpaved roads and even today some relevant ones still remain inaccessible.
- ▶ Belizean tourism product supply still remains narrowed when it comes to offer nature based activities, particularly inland, and those presently offered are concentrating on very few marine and inland sites producing higher environmental risks to those particular ones.
- ▶ The environmental impact of the tourism activity is clearly an issue in marine and land nature reserves. There is a high risk for strong deterioration of the biodiversity, particularly on marine areas, which are so far the most visited ones.

#### *Adventure Tourism*

Belize's nature environment provides a setting for adventure tourism activities for experiences and non-experience visitors. In Belize adventure tourism is particularly developed in jungle areas. Jungle adventure tourism involves active multifaceted physical means of travel in the jungle regions of Belize. Jungle tours are becoming a major component of green tourism in tropical destinations and are a relatively recent phenomenon in Western international tourism.

Belize is a living laboratory in this regard and you can meet some of Belize's wildlife in the "Best Little Zoo in the World," climb Victoria Peak, canoe on the Macal river, cave-tube down the Sibun River or listen to the roar of the black howler monkey in the forest canopy overhead. Guided tours, adventure packages, day trips, overnight expeditions, and annual races take advantage of the year-round river flows and are easily accessible.

Belize adventure tourism is characterized by the following features:

- ▶ Belize has an extraordinary and pristine nature environment to develop adventure tourism activities for experienced and non-experienced visitors.
- ▶ Adventure guiding licenses are general focused (except for caving, whale shark, and diving) and therefore further specific licenses for technical activities should be given in areas such as mountaineering, kayaking, rock climbing, canyoning, etc. Focused training for such specific activities should also be provided.
- ▶ Adventure activities are taking place without sufficient safety conditions (i.e. no regular use of helmets, lack of security systems, not available medical or first aid services on site, etc.)

### *Cruise Tourism*

Belize offers cruise tourists the opportunity to visit the fascinating mainland and the extraordinary coastline, by means of numerous excursions, tours and activities which are organized daily. Cruise tourism involves pleasure trips by ship, where the voyage itself and the ship's amenities are part of the experience, as well as the different destinations along the way. The cruise sector is of great importance in Belize reaching almost 600,000 cruise visitors in 2008, which is 71% of the total arrivals including stay-over tourists. Belize City hosts the most cruise traffic, with over 40% of passengers disembarking from its ports. During their stop-over on the mainland, cruise visitors undertake excursions to the coast, visits to the zoo, or more adventurous activities to Mayan Ruins, hiking, or cave tubing.

Belize cruise tourism is characterized by the following features:

- ▶ Belize cruise visitors are undertaking day-visits to major tourism attractions in Central Belize, therefore the same attractions (marine and inland) are exposed on a daily basis to serious environmental and social negative impacts through the mass tourism activity caused by cruises.
- ▶ The impact of cruise tourism on Belize's eco-tourism and cultural sites, which is gradually changing the characteristics of visits to popular cruise tourism sites from eco-tourism/ cultural experiences to mass tourism experiences.
- ▶ Non existence model for cruise tourism and unclear policy on regulations and considerations the Cruise Tourism industry should be basing their activity on.



## 7. Conclusions

### 7.1 SWOT

Belize as a tourism destination has a wide range of strengths that should be promoted in terms of tourism development. Its tourism attractiveness excels on biodiversity, ecotourism and cultural sites with specific sites valued at an international interest having great potential for tourism development.

However, sustainable practices should be an issue to include in all tourism practices in order to avoid environmental damage of the natural and cultural sites of Belize.

On the other hand, it also faces many weaknesses highlighting lack of basic service provision and infrastructures, technical skills and quality of tourism facilities, a low promotion of the destination, lack of tourism product services and other socio-economic constraints that should be minimized.

As described below there are the main conclusions obtained from the diagnostic phase, highlighting strengths, weaknesses, opportunities and threats:

#### *Strengths*

- ▶ Tourism Supply
  - Attractive and varied cultural and natural resources
  - Belize hosts three unique tourism assets in heritage and ecotourism
  - Small size of Belize facilitating easy connections
  - Friendly people involved in the tourism industry
  - Belize as an English speaking country
  - High social cohesion towards the tourism industry
  - The destination is not overdeveloped neither overcrowded
  - Peaceful democratic position offering stability and security
- ▶ Tourism Governance and Institutional Capacity
  - Comprehensive system for managing tourism
  - Large number of public entities, private sector associations and NGOs involved in tourism
  - Good involvement of certain stakeholders in the decision-making process
  - The Government of Belize offers specialized and effective incentives for investment

#### *Weaknesses*

- ▶ Tourism supply
  - Lack of preservation, use and management of the tourism assets
  - Most cultural heritage still remains covered and unexcavated
  - Relevant tourism assets lack tourism facilities and services
  - Lack of air connections to Europe, South-America and Canada
  - Low supply man-made attractors (leisure services)

- Expensive tourism destination where pricing do not match quality
- Reduced cooperation among the fields of tourism activity
- HR lack of technical skills and resistance to learn languages
- Constraints on basic services provision and infrastructure
- Lack of sustainability awareness
- Presence of crime in some areas
- ▶ Tourism governance and institutional capacity
  - BTB is under-resourced and has limited presence and responsibilities
  - Lack of legislation and infrastructure on crisis/disaster plan
  - Relevant decisions are being made without the input of the tourism sector
  - Lack of a proper tourism marketing plan for Belize
  - Limited access to capital for investment

### *Opportunities*

- ▶ Tourism supply
  - Wide range of tourism attractions addressed to a high variety of tourists
  - Belize hosts underutilized attractive natural and cultural resources
  - Great potential for developing and diversifying tourism products
  - Some areas have potential to grow up and develop in tourism volume
  - Belize has the opportunity to boost transport synergies with neighboring destinations
  - Opportunity to establish quality standards
  - Opportunity to foster cross-border tourism initiative
- ▶ Tourism demand
  - Overall increase of overnight visitors and annual tourist expenditure
- ▶ Sustainability
  - Tourism industry must be seen as a vehicle for the alleviation of poverty
- ▶ Tourism governance and institutional capacity
  - Great importance of available, accessible and direct flights from top markets
  - Certain core stakeholders should be highly considered in the definition and implementation of Belize Tourism Policy

### *Threats*

- ▶ Tourism supply
  - Cruise tourism might boost mass tourism to Belize depriving tourism visitor experience
  - Belize faces competition from tourism consolidated neighboring countries
  - Global recession might affect tourism industry

- ▶ Tourism demand
  - Risk of mass tourism in certain tourism areas
- ▶ Sustainability
  - Risk of deterioration to some protected archaeological and natural sites
  - Threat of natural disasters that might impact to competitiveness and development
  - Vulnerability of climate change, overall in coastal areas
  - Devastating impacts that oil spill could have on Belize's very sensitive marine ecosystem
  - The current economic situation poses even greater challenges in maintaining a healthy environmental and natural resource base

## 7.2 Constraints for Sustainable Tourism Development

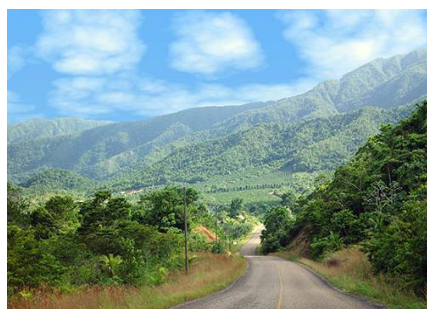
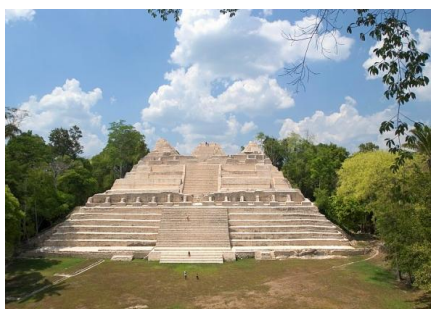
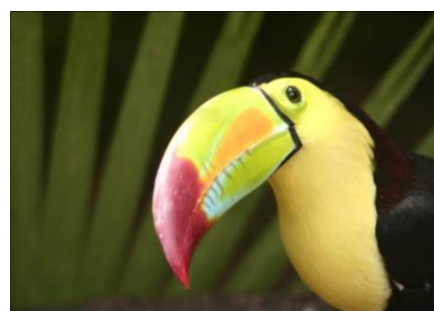
The following summarizes main constraints identified during the diagnostic phase and highlights their negative impacts.

- ▶ **Poor level of accessibility on land**, mainly due to a small amount of paved roads leading to the tourism assets. Result in:
  - Low visitor numbers (as for the three unique assets identified: Coral Reef, Blue Hole, Caracol and assets in Caracol, Orange Walk and Toledo district, broad network of nature parks and reserves)
  - Overcrowding at tourism destinations that are easy to be reached (mainly due to a large amount of cruise passengers)
- ▶ **Poor level of accessibility by air**, mainly due to few international flight connections and bad connecting flight schedules. Result in:
  - Low arrivals of European visitors (a lucrative market segment)
  - Fewer overnights in Belize, and more overnights spent at the stop-over destination
- ▶ **Lack of sufficient and qualitative tourism services and facilities**, mainly due to poor training methods, low investment level of international hotel chains and local private companies. Result in:
  - Degradation of Belize's tourism image
  - Low levels of cooperation in the fields of mutual activity
  - Low level of tourist satisfaction
  - Low level of diversification, result in the concentration of tourism supply and create tourism hubs
- ▶ **Lack of handicraft shops** and commercialization of traditional products and leisure activities. Result in:
  - Less foreign exchange
  - Low level of tourist satisfaction, as arts and crafts are part of the visitor experience
- ▶ **Lack of asset management**, mainly due to lack of awareness, knowledge and financial issues. Result in:

- Over-visitation of sights
- Serious environmental and social negative impacts
- Decrease of destination image: from eco-tourism or cultural sites to mass tourism (such as in Lamanai and Altun Ha)
- Risk of serious deterioration, due to lack of diversification of product offering (marine assets, nature assets)
- Damage of marine habitat due to larger vessels, especially at anchor
- ▶ **Lack of communication and promotion of tourism assets.** Result in:
  - Low visitor numbers at international and unique attractive assets, such as in Toledo and Cayo districts
- ▶ **Insufficient waste disposal,** result in:
  - Mosquito infestation
  - Malaria and dengue infection risk
- ▶ **Insufficient sewage systems,** result in
  - Water contamination
  - Diseases due to water contamination
  - Negative image of the country's development
- ▶ **Lack of land planning and regulation,** result in
  - Haphazard and inadequate urban development
  - Incompatible development of commercial, industrial and residential activities
  - Environmental concerns
  - Urban hubs with increased population impacted by pollution
  - Traffic congestions mostly due to bigger vehicles dominating small streets
  - Degradation of the landscape
  - Beach erosion and navigational safety hazards due to coasts clustered with piers and jetties
  - Uncomfortable feeling for residents and visitors
- ▶ **Lack of public awareness programmes,** result in:
  - Degradation of beaches and the natural environment, promotion of ecotourism and sustainability issues
  - Lack of understanding the necessity for ecotourism, especially in nature rich countries
  - Inappropriate usage of natural resources, such as the reef, national parks and rainforests
- ▶ **Lack of local involvement into to the Tourism Value Chain,** result in:
  - Lack of awareness and economical importance of tourism to improve the local quality of life.
  - Neglecting or lack of understanding on how to use tourism as a tool for poverty reduction.

# NATIONAL SUSTAINABLE TOURISM MASTERPLAN FOR BELIZE 2030

## Strategic Framework for sustainable tourism development in Belize



*June, 2011*



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## 1 Introduction

The present strategic framework of the National Sustainable Tourism Master Plan of Belize 2030 is composed of a set of strategies whose implementation would lead Belize to be a competitive and sustainable tourism destination in tomorrow's highly competitive tourism environment.

*The strategic goals: what Belize aims to achieve through the tourism master plan*

The strategic goals are based on Belize's strengths and weaknesses and are selected to mitigate constraints as well as to take advantage of Belize's opportunities. To achieve this, the objectives which the master plan aims to achieve in the period from 2010 to 2030 are structured into four groups:

- ▶ **Sustainability:** enhance positive sustainable impacts from tourism
- ▶ **Optimization:** optimize socio-economic benefits from tourism
- ▶ **Competitiveness:** achieve competitiveness as a world-class destination
- ▶ **Leadership:** support Belizean stakeholders to take leadership of the country's own sustainable tourism development

A set of specific strategies has been defined with the aim of achieving the above mentioned goals. Each strategic group is composed of a set of strategies forming its core structure. The approach of connecting objectives to strategies is followed throughout the entire master plan as follows:

Objectives	Strategic groups	Strategies
Sustainability	<ul style="list-style-type: none"> <li>• Destination strategy</li> </ul>	<ul style="list-style-type: none"> <li>• Product cluster programmes</li> <li>• Focused and controlled development</li> <li>• Phased implementation programme</li> </ul>
Optimization	<ul style="list-style-type: none"> <li>• Product strategy</li> <li>• Market strategy</li> </ul>	<ul style="list-style-type: none"> <li>• Diversification of the product portfolio</li> <li>• New target markets and market penetration</li> </ul>
Competitiveness	<ul style="list-style-type: none"> <li>• Commercial strategy</li> </ul>	<ul style="list-style-type: none"> <li>• Excellence in tourism through quality improvement</li> <li>• Unique branding to commercialize better</li> </ul>
Leadership	<ul style="list-style-type: none"> <li>• Governance and institutional strategy</li> </ul>	<ul style="list-style-type: none"> <li>• Public-Private Partnerships (PPPs)</li> <li>• Destination Management Organization (DMO)</li> <li>• Cluster Management Units (CMUs)</li> </ul>

Source: T&L, 2010

It is crucial at this stage to determine the appropriate positioning or vision statement that will differentiate Belize from its competition, thus facilitating the achievement of these objectives. The vision statement articulates the envisioned ideal future of Belize in 2030 from the tourism point of view. Hence, it provides the answers to the following questions: What kind of tourism destination will Belize become in 2030? What kind of tourism products will Belize offer? And what kind of impressions and experiences will Belize provide to tourists? The answer to these questions will certainly affect the outcomes of the master plan, and thus the degree of success in achieving the set objectives.

*The strategic vision: how Belize should be seen in 2030*

Belize is a county with rich natural resources ranging from the Caribbean beaches to the depths of the rainforests; these sanctuaries are home to a wide range of exotic flora and fauna species. Within the country, multiple civilizations have existed, building a rich cultural heritage which is nowadays accessible and able to be experienced.

These factors lead to the definition of an appropriate strategic vision statement of Belize in 2030 including the key components of the concept: sustainability, authenticity, uniqueness and competitiveness.



This vision statement highlights four main components, of how tourism in Belize will be perceived, namely that Belize will be a sustainable, authentic, unique and competitive tourism destination by 2030.

- ▶ **Sustainability** refers to the capacity of endurance, meaning that tourism in Belize will require the reconciliation of environmental, social and economic demand in order to be sustained for future generations. Hence, a sustainable tourism strategy with ecologically-friendly destinations is an investment in the future of the entire country and its population.
- ▶ **Authenticity** refers to the Belizean lifestyle and to its unspoiled nature. With its different cultures and ethnic groups, Belize is a cultural melting-pot. The people represent the warm, friendly and welcoming Caribbean charm of Belize and are pleased to present their own traditions to international visitors.
- ▶ **Uniqueness** refers to Belize's natural and cultural variety. Belize is unique in its Central American – Caribbean spirit, in its British colonial past within Central America, and in some of the natural assets offered and preserved by the country.
- ▶ **Competitiveness** is measured in comparison with its main competitors. This means that Belize will foster its strengths and minimize its existing weaknesses. As a tourism destination, Belize will always undergo new changes in order to remain up-to-date with the customers' demand. Hence, when visitors will have the choice of visiting Central America, Belize will definitely be on their itinerary.

In order to realize the defined vision of tourism in Belize in 2030, the required key elements are:

- ▶ The development of **mid-high quality tourism facilities** to enhance the image of Belize as a tourism destination and to stimulate the demand of...
- ▶ ...a **mid-high clientele**, which will respect Belize's culture and nature. This segment will provide the most appropriate image of Belize as an internationally recognized and respected eco-tourism destination and will generate the required financial resources to maintain...
- ▶ ...a **mid-low level of development** of the destinations in order to remain on an ecological friendly and sustainable path with...

## Strategic Framework for Sustainable Tourism Development • National Sustainable Tourism Master Plan of Belize

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- ▶ **...low environmental and social impacts** to prevent the degradation of natural and social aspects and/or assets and therefore, to remain on a sustainable development path.

### *The strategic framework*

The strategic framework for sustainable tourism development has therefore been designed to achieve optimization, enhance sustainability, promote competitiveness and support leadership at national and destination-level in Belize. Each strategic group is composed of a set of strategies that form its core structure, which is structured as follows:

- ▶ **Strategy to enhance sustainability** of tourism: destinations strategy
- ▶ **Strategy to ensure optimization** of tourism: product and market development strategies
- ▶ **Strategy to achieve competitiveness** of tourism: commercial strategy
- ▶ **Strategy to support leadership** of the tourism sector: institutional strengthening and governance strategy

## 2 Strategy to enhance sustainability of tourism: destinations strategy

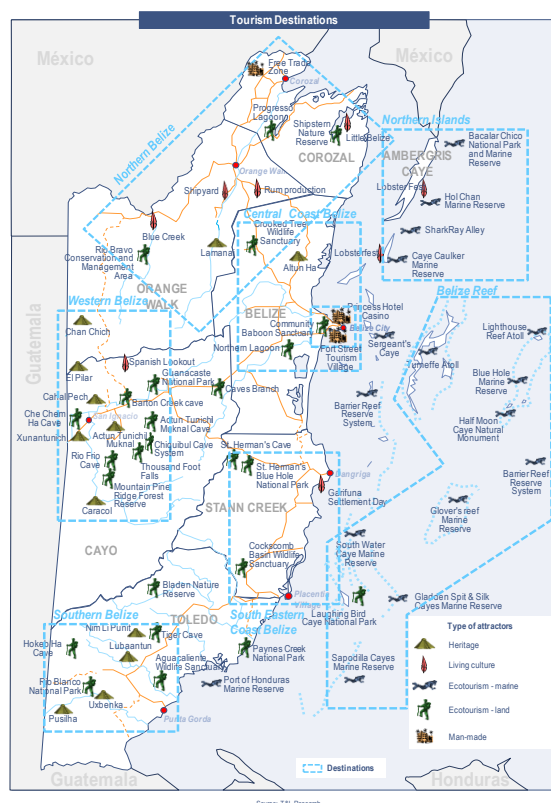
Tourism development in Belize may cause negative impacts, such as uncontrolled development, mismanagement of protected areas, etc. This is especially so considering the high sensitivity of Belize's tourism assets, making necessary a strong sustainability approach in order to conserve them well in the years ahead. Therefore, the maximizing of positive economic impacts and the minimizing of both environmental and social negative impacts are required in order to market Belize as a high-class destination over time, since no high-quality tourists would be willing to pay a large sum of money to visit a country where the environment is being seriously damaged and the social aspects neglected.

Thus, to preserve Belize's high-class model for tourism, it is of capital importance to use the country's strengths (natural biodiversity and cultural mixture) wisely, by protecting and conserving them when opening it up for new tourism markets and increased visits, so that resources are used sustainably and do not suffer from degradation.

Hence, the destination development strategy must be conceived integrating that sustainable approach, by determining the concept for each destination, as well as the appropriate model for development in terms of overnights and densities. The degree of sustainability in the overall tourism sector in Belize will certainly depend on the development model applied at each destination.

A set of seven tourism destinations have been identified and agreed upon for development by creating hubs based on present and potential tourism flows. These destinations define the regional nature of tourism products that are either currently offered and/or that could be developed. Those seven destinations shown at the map are the following: Northern Belize, Northern Islands, Central Coast Belize, Western Belize, South Eastern Coast Belize, Southern Belize and Belize Reef.

To achieve sustainability, three strategies have been defined in line with the strategic objective:



► **Defining product cluster programs:** design and develop a wide set of cluster programs in order to develop products structured as national clusters. These programs should be composed of actions and projects that products require for successful sustainable development. The programs will be conceived at the action plan phase, being very cautious to avoid any negative environmental and social impact.

► **Focused and controlled development:** implementation should be focused on specific areas or sites, facilitating control of the positive and negative impacts as well as managing development properly. A focused implementation will allow the maximizing of economic impacts and the reduction of negative ones. Destinations in Belize would benefit much more through investment optimization - meaning not extending them widely, but restricting them to specific sites —which in turn would also restrict any negative impact caused by development of those sites by conserving others well.

Since sustainability is a key issue to be considered in the destination strategic framework, both development and density models proposed for each destination

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take into account the positive and negative impacts at economic, social and environmental levels, as well as the carrying capacity of each site. The strategic model for tourism in Belize reflecting those criteria is focused on a mid-level growth in terms of overnights –low in rural or sensitive sites– and low in terms of density, except in certain areas allowing higher densities. The overall development/ density strategic model per destination has been structured as follows:

**Development and density model of Belize's tourism destinations**

Destination	Overnights in 2008	Overnights expected in 2030	Development of overnights / visitors	Density level <sup>1</sup>
Northern Belize	200.674	651.310 CAGR 6.9% (2010 – 2020) and CAGR 5% (2020 – 2030)	Mid (overnights) Mid-High (day visitors)	Low/ Mid
Central Coast Belize	307.251	897.376 CAGR 5.5% (2010 – 2020) and CAGR 6.1% (2020 – 2030)	Mid(overnights) High (day visitors)	Mid
Western Belize	486.502	989.084 CAGR 4.3% (2010 – 2020) and CAGR 3.5% (2020 – 2030)	Low in rural areas, mid in urban areas (overnights)	Low in rural areas/ Mid in urban areas
Riviera Belize <sup>2</sup>	113.942	1.262.520 CAGR 13.5% (2010 – 2020) and CAGR 12.5% (2020 – 2030)	Mid (overnights) Low (day-visitors)	Mid
Placencia	166.438	489.710 CAGR 8.6% (2010 – 2020) and CAGR 3% (2020 – 2030)	Mid (overnights) Low (day-visitors)	Low
Southern Belize	40.587	248.370 CAGR 10.4% (2010 – 2020) and CAGR 9.6% (2020 – 2030)	Mid (overnights)	Low
Northern Islands	663.287	1.209.224 CAGR 4.6% (2010 – 2020) and CAGR 2.2% (2020 – 2030)	Low (overnights)	Low in rural areas/ Mid in urban areas
Belize Reef	68.644	147.783 CAGR 4.0% (2010 – 2020) and CAGR 5.0% (2020 – 2030)	Mid (day visitors) Low (overnights)	Very low

Source: T&L, 2010

- ▶ **Phased implementation program:** due to the constrained economic resources Belize has for tourism development, it is required to **set priorities for investment and define a clear phased program**. This will also improve benefits from tourism allowing the projects to be completed, and their results achieved, before new investments are starting in other programs or sites.

At that stage, it is necessary to determine what priority will be given to each of the destinations presented, in order to identify those providing the best opportunities for expanding the value of tourism with the lowest risk. Different comparative indicators relevant to the development of sustainable tourism development were selected, rated and ranked in order to identify the prioritized destinations based on the Importance-Urgency/Implementation Ease analysis.

- ♦ The **“importance”** criteria referred to the destinations’ sustainability issues: Environmental – Economic – Social and destination tourism planning issues.
- ♦ The **Urgency/Implementation Ease** criteria referred to socio-economic and environmental issues as well as tourism planning and management issues.

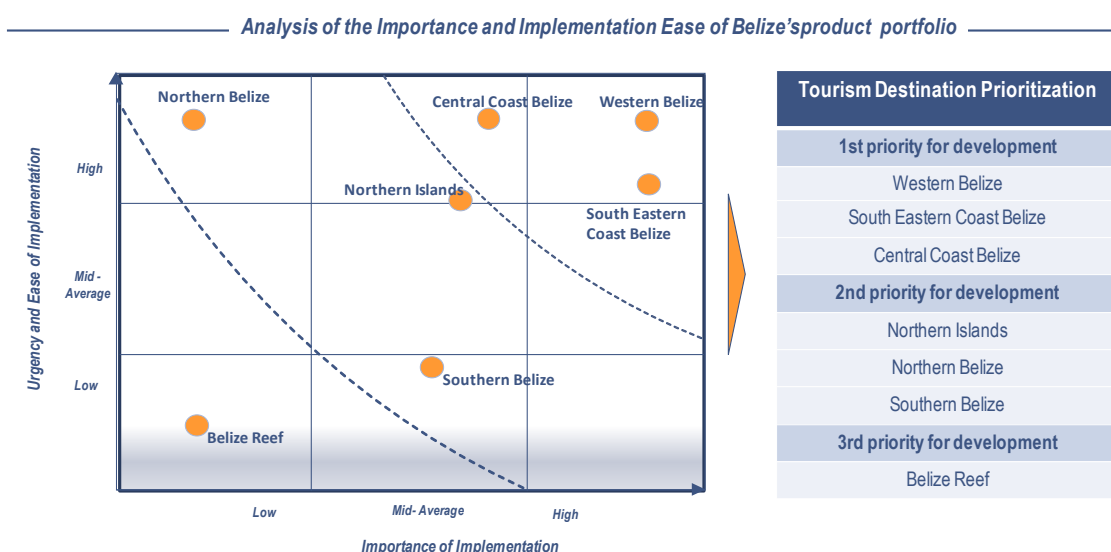
<sup>1</sup> References to the density levels is provided in Appendix A.

<sup>2</sup> This table divides the destination South Eastern Coast Belize in Placencia Peninsula and Riviera Belize in order to illustrate the individual changes in that destination.



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Based on these criteria, the matrix below indicates each importance-urgency/implementation ease rating of each tourism destination.



The importance-Urgency/Ease of Implementation Analysis identifies which tourism destinations should be developed first.

- Western Belize, South Eastern Coast Belize and Central Coast Belize** were identified as sharing approximately the same level of importance and urgency for development, especially due to their high potential market share of tourist overnights by 2030, the fact that these destinations represent a mid-high potential to reduce local tourism seasonality and that these destinations currently are the most operated by international tour operators. The high rating in implementation ease and urgency of tourism in these destinations is due to their high potential to impact positively on the local economy based on their high local unemployment rates, their high potential share of tourism overnights hosted by 2030, their currently planned construction developments, the strong stakeholder participation and the presence of an updated tourism master plan.
- A second priority of development was identified for the **Northern Islands, Northern Belize and Southern Belize** due to the high potential of positive socio-economic impacts and their high growth potential or potential market share of tourism overnights by 2030. Northern Islands was highly rated for its existing infrastructure level and plans for new developments. Northern Islands and Southern Belize were rated to be highly important based on their potential to offer seasonality-reducing tourism products, their potential to reinforce Belize's eco-friendly and sustainable destination image and their highly bio-diverse environments. Northern Belize was rated to be highly urgent to be implemented due to its high unemployment rate and criminality rate in the current existing Free Trade Zone.
- Belize Reef's** development is not regarded to be urgent or important for the general development of the country.

This rating was especially a result of its low potential to generate overnights, the low level of projects planned, its lack of management capacity, its current development level within the destination and their poor connectivity to other tourism destinations.

However, this does not mean that Belize Reef should be left out, as its investment and development is required to diversify and complete Belize's tourism destination portfolio.



### 3 Strategy to ensure optimization of tourism: product and market development strategies

The current scope of work by the BTB is limited to marketing, registration/ licensing and capacity building issues, and is not involved in the process of product development –but only goes as far as quality assurance, training, tourism planning, and investments promotion. Further input from the tourism sector should also be allowed in terms of accessibility and transportation infrastructures. This is required in order to avoid the current conditions of the sector in the country, characterized by insufficient quality of tourism facilities and services, as well as non-structured tourism products.

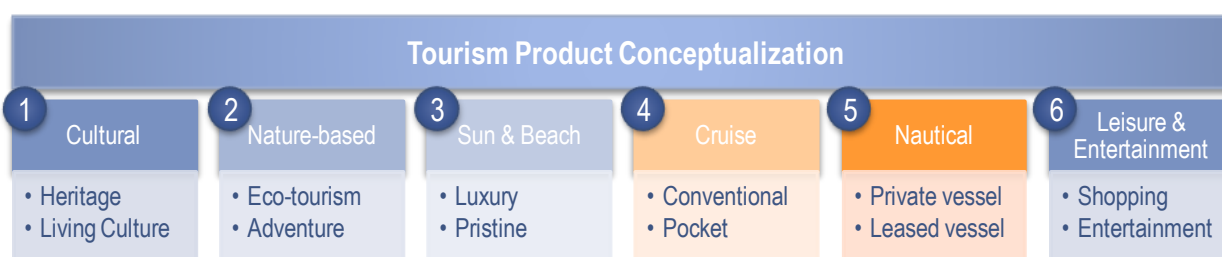
To reach optimization, a strategic product and market framework has to be structured to maximize benefits from Belize's portfolio of tourism products, targeting new focused and niche markets:

- ▶ **Diversification of products:** Belize has a wide range of world-class assets (both inland and marine) such as the Barrier Reef, the Blue Hole, the Chiquibul Cave System, Caracol, etc. providing an opportunity to create an excellent diversified **product portfolio with the capacity to generate overnights, and thus increase the average length of stay.**

The main tourism products are a selected set of products which are strategic for the development of the country. They have been selected from a competitiveness-importance-attractiveness analysis of the country from a long list. They are main tourism motivations that encompass many tourism activities under their product portfolio such as diving, sports fishing, demand driven.

Some of these products do already exist in Belize; however, all of them need to be further developed in order to enrich the tourist experience and enhance product diversification to meet the customers' demand.

As a result, Belize has strong potential to expand tourism developing by becoming structuring a destination offering of six main types of tourism experiences. The proposed product portfolio is composed of the following categories:

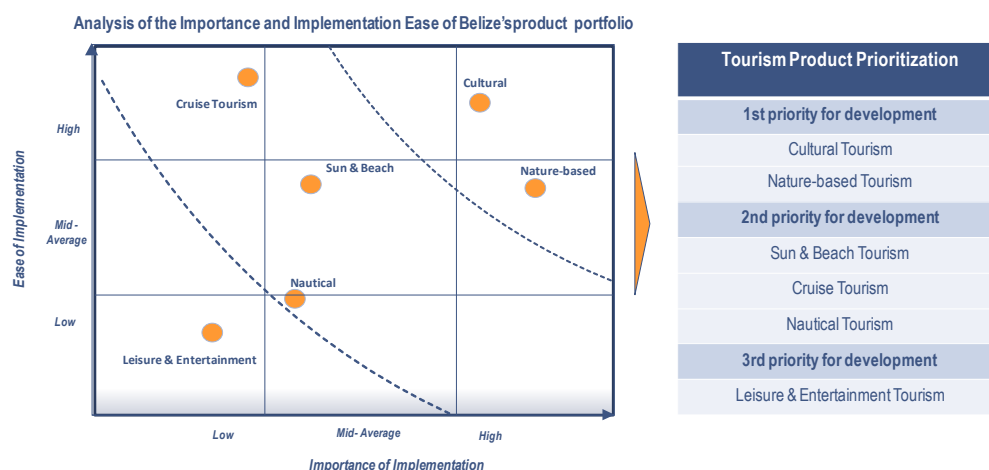


Source: T&L, 2011

At this stage, development priorities must be determined for each of the tourism products in order to identify which product provides the best opportunities for expanding the value of tourism with the lowest risk. Product prioritization is based on two basic criteria which will further prioritize the development and, hence, the investment priority of each product:

- ♦ The **importance** measure will be based on the competitiveness and attractiveness of each tourism product assessed from an overall perspective.
- ♦ The **ease of implementation** will indicate the level of urgency for development of the tourism product, as well as the technical feasibility or ease of implementation.

## Strategic Framework for Sustainable Tourism Development • National Sustainable Tourism Master Plan of Belize



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The Importance/ Ease of Implementation Analysis identify which tourism products should be developed first.

- Cultural Tourism** is evaluated as being the first priority for development, based on its high importance on implementation and increased ease and urgency level. Its priority level is mainly due to the potential size of the global market consuming cultural tourism, its contribution to product diversification for Belize's tourism portfolio, its potential to reduce seasonality, its potential to reinforce Belize's sustainable tourism image, its geographical distribution within the country and the participation it attracts from national tourism stakeholders.
- Nature-based Tourism** is the most important tourism product to be developed; however, its implementation will require time and investment in, for example, educating professional labor forces, the need for specific accommodation facilities and the elaboration of concrete policies related to this product in order for it to be operated at a level of excellence. However, its first priority status is based on its growth potential in terms of arrivals, the potential revenues per product, and its potential to increase tourists' length of stay and spending. In addition, nature-tourism is regarded as being a product with high potential in regards to reducing poverty in rural areas.
- Sun & Beach Tourism** is evaluated as a tourism product of second priority due to its high potential for growth in terms of arrivals, its further consumption potential (as sun & beach tourists usually consume additional tourism products). However, Sun & Beach cannot be regarded as a first priority product due to its marked seasonality, its low potential for positive environmental impacts and its high potential for negative environmental impacts during the construction phase of the infrastructure.
- Cruise Tourism** is identified as being a product with a low to medium grade of importance. This is especially because its quality depends on the prior development of other tourism products, its low potential for generating revenues per visitor, its very reduced potential for generating overnights in the destination (especially for conventional cruise tourism) and the fact that conventional cruise tourism does not reinforce a sustainable tourism destination image. However, it is definitely the product whose development is most urgent and uncomplicated, as its functioning doesn't require the construction of specific accommodation facilities or a large amount of skilled or professional human resources. In addition, Cruise tourism is regarded as being a booming global and regional trend and it urgently needs to be developed (along with the destination) in order to prepare for the new markets and the further arrivals it is expected to generate. As Fort George Port has limited capacity and further cruise passengers growth is expected, a second conventional cruise port is required to enable growth of

cruise passenger arrivals. Port Loyola was identified to become Belize City's second conventional cruise port.

- ♦ **Nautical Tourism** involves implementation that will be very time consuming, especially as it requires a high amount of professional and skilled labor, additional infrastructures and strong law enforcement policies to maintain its development.
- ♦ **Leisure and Entertainment** is regarded as being less important and most time consuming. Its development will hence consume more financial and human resources in order to accelerate the consolidated product-lifecycle status, as it will require a large amount of professional work forces, large investments in construction, promotion and maintenance. In addition, it is regarded as having only a small potential to generate overnight stays, as this tourism product is mostly concerned with day visits.
- ▶ **New target markets and market penetration of current ones:** new target markets should be established, thus avoiding dependency on one single market, according to criteria of visit motivations and return on investment. These should be managed and promoted appropriately in order to foster tourism overnights and revenues.

	International USA and Canada	International Europe	International Regional
<b>Countries</b>	<ul style="list-style-type: none"> <li>▶ United States of America</li> <li>▶ Canada</li> </ul>	<ul style="list-style-type: none"> <li>▶ United Kingdom</li> <li>▶ Germany</li> <li>▶ France</li> <li>▶ Netherlands</li> <li>▶ Italy</li> </ul>	<ul style="list-style-type: none"> <li>▶ Central America</li> <li>▶ Mexico</li> <li>▶ Caribbean</li> </ul>
<b>% of arrivals by market (2009)<sup>1</sup></b>	67.5%	12.7%	12.6%

<sup>1</sup> Source: BTB Statistics 2009

In 2009, about 232,249 international tourists arrived and spent their vacations in Belize. Its main tourism markets are the USA and Canada, which account for 67.5% of the arrivals. However, the majority of tourist arrivals to Belize are generated by day visitors, according to 75% of all the international arrivals to Belize.

The market strategy is based on **attracting new tourism markets with the highest potential** for Belize according to product

consumption patterns. The **main current international markets arriving to Belize have also been considered for market penetration**. The aim for both would be to increase their tourism demand, as well as increasing their length of stay.

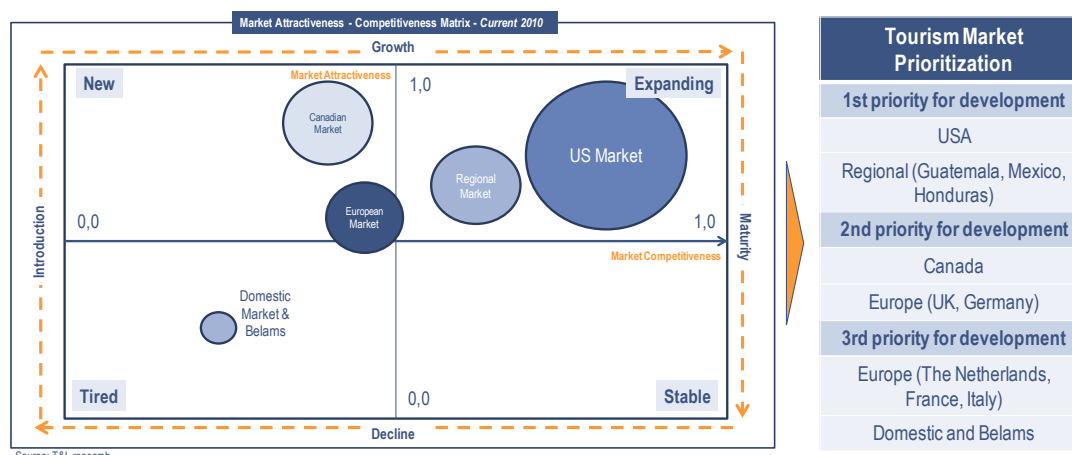
In order to set market strategies, the markets with most current potential are being analyzed based on their attractiveness and competitiveness:

- ♦ The size of the market circles represents the potential market size.
- ♦ The attractiveness combines four variables: the market's current size, the average length of stay, the annual growth and the average expenditure per market.
- ♦ The competitiveness combines two variables: the market share and the accessibility to reach Belize.

The four cells of the attractiveness – competitiveness matrix represent the stages which the markets are in at present, and can be related to the typical market-lifecycle which a market undergoes:

- ♦ New: introduction of the market
- ♦ Expanding: market growth
- ♦ Stable: maturity of the market
- ♦ Tired: stagnating market, market on decline

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The **US Market** has the highest competitiveness level and a very good attractiveness level. It is an expanding market and the market leader for tourism arrivals to Belize. In order to stabilize the market, the market requires high investments to increase the market growth.

- The US Market is the market of primary investment in order to increase the market growth and the revenues.
- In addition, the market should be utilized to foster revenues for its further development and the development and promotion of other expanding or new markets.
- Vision 2030: By 2030 the US Market should be a stable market and the most important market generating arrivals and large revenues for Belize.

The **Regional Markets**, especially Mexico, Guatemala and Honduras are attractive markets, based on their length of stay and their reasonable expenditures per day. The market requires a medium level of promotional investments in order to increase its market growth, which can be related to the strategy that Belize is and will be positioned as a mid/high-end tourism destination.

- Based on this strategy, only a small percent of regional markets may be able to afford to travel and spend vacations in Belize by 2030.
- The strategy would be to promote the specific products and destinations that are appropriate for the markets which meet the defined financial capacities by 2030, and then focus on the high-income travelers in these markets:
  - For Guatemala and Mexico markets the main motivations to be promoted will be Sun & Beach and Nautical tourism, under the types provided in the country.
  - For Mexicans close to the border with Belize, a key motivation will be to visit Northern Belize or Belize City for mid-high end Leisure & Entertainment offering.
  - Under the Regional Market Group, the international citizens travelling around the region will be considered. This group includes either independent travellers or tour operators' organized groups on regional tours and itineraries. The main promotion for these groups will be under the following key motivations:
    - Nature/adventure tourism
    - Cultural heritage routes
- The regional markets do not require huge promotional and infrastructural investment, but they do need improvements in terms of connectivity and trans-boundary facilitation (regional visa, improved laws for land transportation from Guatemala/Mexico to stop in Belizean destinations; etc.); as well as regional aerial and nautical routes and services.
- By 2030 the Regional Markets will be a small market, focused to attract only regional visitors willing to spend mid-high end holidays.

The **Canadian market** has the highest level of attractiveness (compared to the other markets, which is due to its increased annual growth rate) combined with a reasonable level of competitiveness. It is a growing market with a small share and can be therefore considered as a new market of growing importance.

- The Canadian market is regarded as very important, but is regarded as second priority, in the light of the needs and requirements of Canadian tourists in regards to the destination. Before being able to attract an important share of Canadian outbound tourists, Belize has to improve its infrastructure, tourism products and —most importantly— its security and criminality issues. Therefore, the development and investment in this market segment is expected to be initiated in the second phase of Belize’s tourism development.
- In order to reach further growth, the market requires ongoing promotional and marketing investments.
- Vision 2030: By 2030 the Canadian Market should be a stable market and one of the most important markets arriving in Belize.

The **European Market** has not yet taken the lead as Belize’s main tourism source market. It is regarded as a market with a high potential, given that the majority of the population travel at least once a year.

- The oncoming years and the market strategy will define the market role Europe is to play in Belize’s market portfolio. Currently, Europe has not yet been targeted. Current arrivals were not “generated”, but rather “happened” by chance. However, Europe should be properly introduced as a new market and correspondingly leveraged in order to foster further arrivals.
- The European market is also regarded as being a very important market, although second priority, due to the needs and requirements of European tourists in regards to the destination. Before being able to attract an important share of European outbound tourists, Belize still needs to: improve its infrastructure, tourism products and its connectivity from the European source markets; and reduce the price of its international flight fares, as European tend to look for good quality and high value for cost. Therefore, development of, and investment, in this market segment is expected to begin in the second phase into Belize’s tourism development.
- Vision 2030. The European Market should be one of the most important expanding markets feeding Belize —especially the markets of the UK, Germany, The Netherlands, France, and Italy.
- New markets could further be: Scandinavian markets, Spain.

The **Domestic and Belams Market** is a small market in terms of its volume and share. In addition it is experiencing decreasing market growth. The market generates revenues but is not very profitable. Nevertheless, domestic market should be promoted as a way to create awareness of civil society about the richness and world class quality of their destinations and assets, as well as to help them enhance national identity and pride about their country. This will finally support the complete development of the category of World Class tourism destination Belize is intended to become.

It is important to mention that Belize has always been a destination that attracts budget travelers from international source markets (mainly United States, Canada and Europe). In the new vision for the country, this is considered as a niche segment, which is not going to be avoided or prevented to visit Belize, but it neither will be encouraged to be attracted. This segment could keep coming to Belize, but it is not a priority market. Nevertheless, it will be considered its activity based motive rather than its low budget condition.



#### 4 Strategy to achieve competitiveness of tourism: commercial strategy

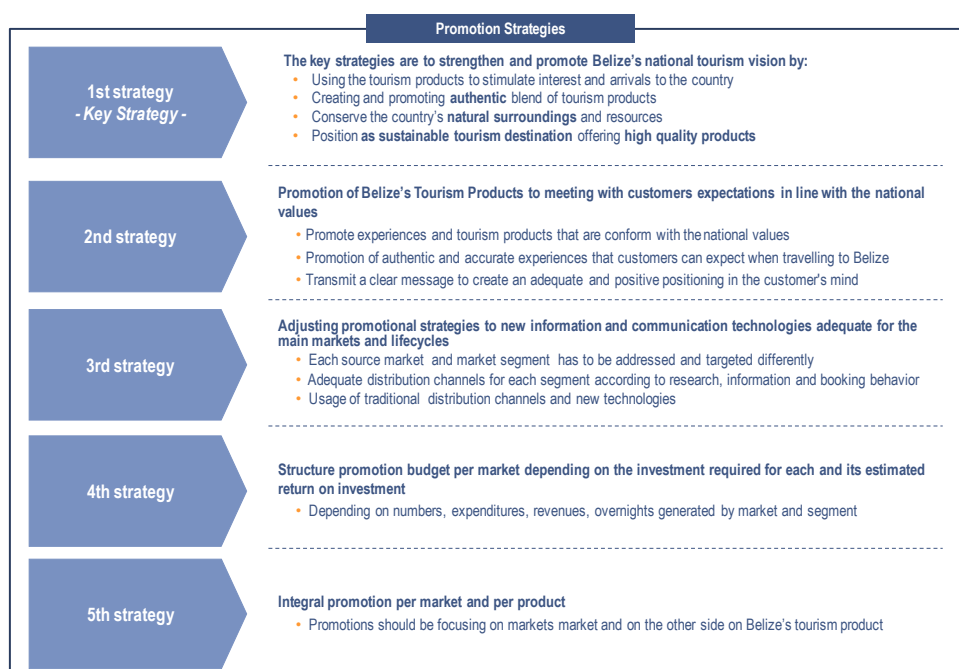
Competitiveness must include an awareness of both the limitations and challenges posed by global competition, at a time when effective government action is constrained by budgetary constraints and the private sector faces significant barriers to its competitiveness in domestic and international markets. Last but not least, the main objective of the master plan is the enhancement of Belize's competitiveness at a global level.

To a great extent, the target market affects the grade of competitiveness that a tourism destination has to achieve. Since Belize aims to attract a mid-high end clientele on a certain scale and to improve their tourism experience while in the country, the local tourism industry has to offer excellent tourism services and products. At present, although there are some excellent quality facilities aimed at offering "exclusivity", Belize's tourism facilities and services in general lack the quality required to target such a high-class segment. In addition, pricing is relatively high in Belize, and this is not likely to change in the next few years.

To achieve competitiveness, two strategies are proposed:

- ▶ **Achieving excellence in tourism through quality improvement:** the country has a strong opportunity to enhance tourism quality standards and enforce policies that will foster competitiveness through the implementation of the master plan. Quality enhancement should be undertaken to improve the standards of the tourism facilities and the offered services, human resources and, in general, the quality of the portfolio of tourism products.
- ▶ **Setting a unique branding to implement the right commercial strategy:** besides quality improvement, a second strategy to make Belize's tourism sector competitive is setting the right branding or unique selling proposition so as to commercialize better. Therefore, differentiating from competition through setting the right branding would allow Belize not just to market products to the right markets, but also to market them in the best way by communicating the right message to the right segment. The branding or unique selling proposition will be defined taking into consideration Belize's unique attractions and strengths to be fostered.

The right strategic framework does not specifically address a market, but stimulates the positioning of Belize as a destination on the global tourism map.



Source: T&L research



## 5 Strategy to support leadership of the tourism sector: institutional strengthening and governance strategy

Belize needs strong leadership in the tourism sector for development, due to the limitations in the competencies of relevant organizations such as the Ministry and BTB, the lack of confidence and cooperation from public and private sectors in regard to major decisions and the generation of new tourism initiatives, as well as the economic and technical constraints on national and municipal institutions.

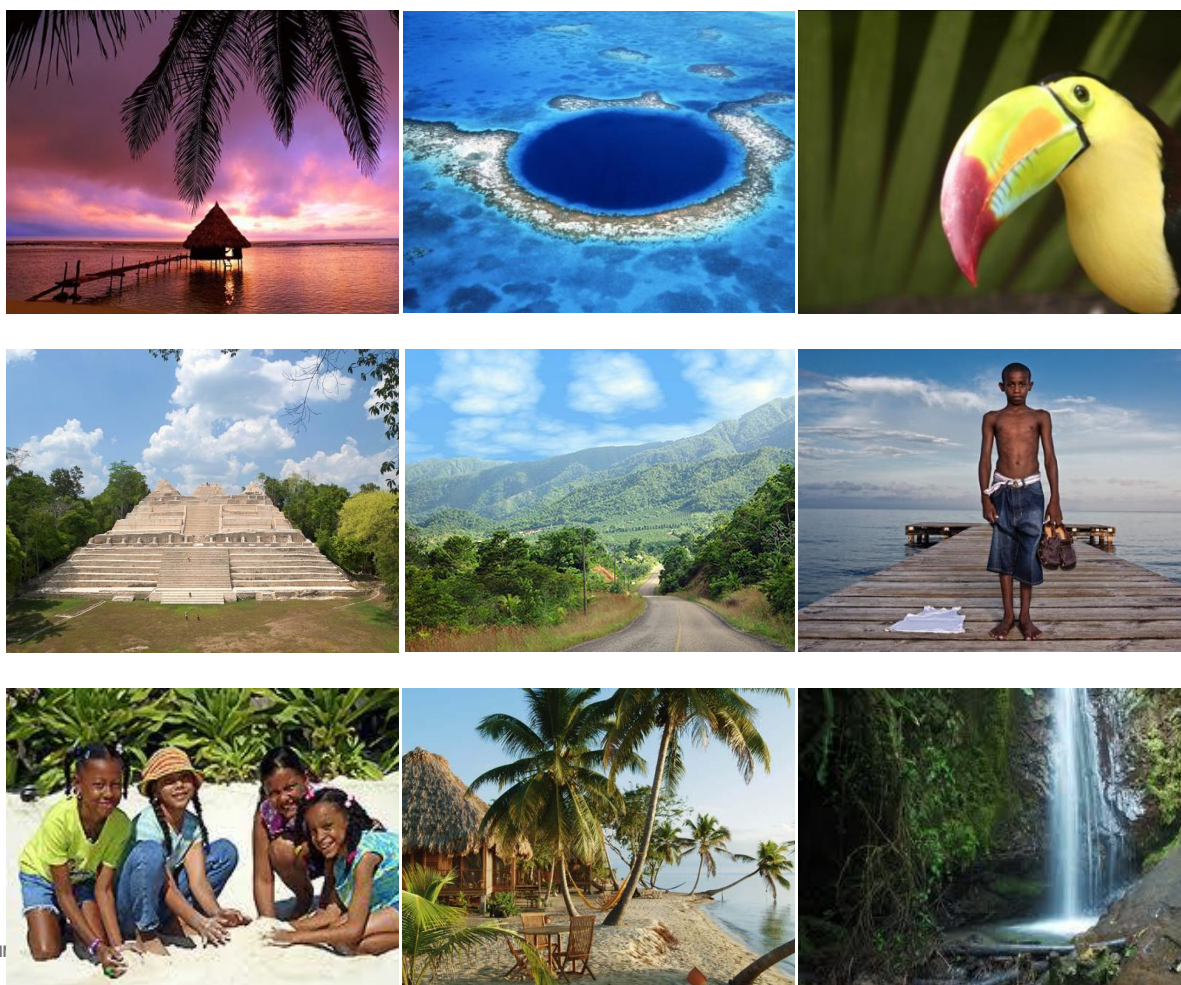
Since strong leadership is required, both public and private sectors should take a major role in leading the development of the tourism sector. A leadership model excluding either of the two sectors in decision-making and major developments will never maximize the benefits Belize can achieve from tourism. Therefore, leadership is a question of public-private decision-making and cooperation in each of the tourism clusters Belize aims to develop. Partnerships between the public and the private sector are the key element that needs to be considered in every step the tourism sector takes.

This master plan, through the objective of providing leadership, should increase the industry's capacity and create consensus and trust amongst Belize's tourism stakeholders, by implementing the following governance and institutional strategies:

- ▶ **Create Product Management Units under BTB structure** assigning a management team lead by a Product Development Director the responsibility to develop each of the core tourism products Belize would be selling to the source markets (nature tourism, culture tourism, cruise tourism, sun & beach tourism, nautical tourism, and leisure & entertainment tourism)
- ▶ **Creating a National Tourism Trust Fund** to promote investment, growth and development in the tourism sector, encouraging better management of tourism resources, while supporting The National Sustainable Tourism Master Planning.
- ▶ **Create Public-Private Partnerships (PPPs):** create PPPs in order to get the best results from tourism development, through promoting an integrated work approach and cooperation among the public and the private sector.
- ▶ **Attraction of Foreign direct Investment (FDI):** attract the international tourism investment community and hotel brands, in order to stimulate the economy and enhance the quality of the offering.
- ▶ **Generate SME growth:** Stimulate professionalization of the tourism service industry, boost local business tourism development and increase capacity skills development of the local workforce.
- ▶ **Create TSA account:** Improve statistical information reliability and relevance in order to support in strategic decision making
- ▶ **Create National security programs:** Address national security issues that affect the tourism sector and hinder sustainable development.

# NATIONAL SUSTAINABLE TOURISM MASTERPLAN FOR BELIZE 2030

## National Destination Physical Plan



*June 2011*

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## National Sustainable Tourism Master Plan for Belize 2030 • National Destination Physical Plan

### PLAN SHEET

### DEVELOPMENT PLANS AND RECOMMENDATIONS

#### NATIONAL SUSTAINABLE TOURISM MASTER PLAN OF BELIZE DEVELOPMENT PLANS AND RECOMMENDATIONS

##### COUNTRY LAYOUT

1	Destinations
2	Land Use
3	Ecosystems
4	Cluster of Products
5	Proposed Model
6	Summary Plan
7	Conceptual Plan

##### DESTINATIONS

A	Central Coast Belize	Regional scale	1/400.000
B	Northern Belize	Regional scale	1/400.000
C	Western Belize	Regional scale	1/400.000
D	South Eastern Coast Belize	Regional scale	1/400.000
E	Southern Belize	Regional scale	1/400.000
E.S	Punta Gorda	Special focus	1/35.000
F	Northern Islands	Regional scale	1/400.000
G	Belize Reef	Regional scale	1/555.000

## 1 Summary

This section of the National Sustainable Tourism Master Plan (NSTMP) aims to address the development of the tourism activities under a physical planning point of view.

It is a framework and does not mean that other initiatives that are not specifically included or mentioned in this master plan should not be considered. Those actions can imply a positive impact on tourism as far as they take into consideration the conceptual approach, spirit and general frame included in this Master Plan.

The land use, zoning and other physical plans, documents, and descriptions created in this scope are intended to address tourism development and to set the proper context for new development and redevelopment. These plans are indicative in nature, and do not have the engineering, environmental, legal and other studies needed for the formulation of regulatory and legally adopted plans that will act as a basis for entitlements.

They will serve as a point of departure and framework for the study and detailed due diligence required for specific investments in capital improvements, development and redevelopment. They will also serve as a conceptual basis for the formulation of regulatory and formal land use studies

The main pillar and inspiration of this Master Plan is **CONSERVATION**. Major tourism attractors that differentiate Belize from other Caribbean and Central American destinations are the generally unspoiled natural environment and cultural resources. The Barrier Reef and Cays of Belize, and the Mayan antiquities are world class by any standard. The simple truth is that if the Tourism Industry in Belize is to provide a long-term benefit to Belize, the natural environment must take center stage in any and all planning regimes.

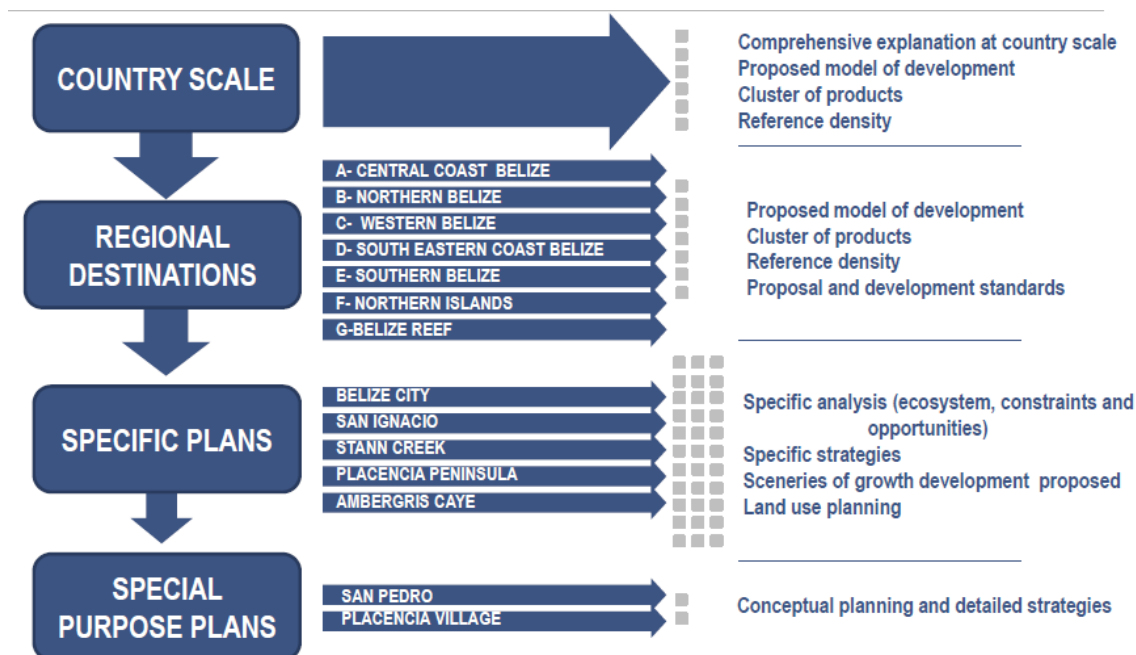
As with land use planning, concerted and coordinated conservation of resources is a low cost, high value strategy. Generally, it does not involve high capital investment, rather legislation, rule-making and administration (much of which is already in place). It is possible for developers to fund review of proposed plans by professionals not on staff. Failure to engage in a comprehensive conservation initiative may also result in a significant loss of value.

As for the way the **CONTENT** has been organized in the NSTMP at first there is an Introduction chapter in which have been included the general issues considered to understand how the proposals and the outputs are addressed.

The following sections develop the content and proposals for the different components of this work. Different scales have been considered from the broader to the more detailed. Each section includes a different level of information and proposals according the corresponding hierarchy and appropriate scale.

As follows there is a diagram summarizing the content of this document with the different levels of information and scales, the way the different destinations or geographical areas have been considered and the different proposals considered:





**COUNTRY SCALE:** Plans including the different destinations, tourism products, and existing ecosystems, models of development, reference density and development standards.

**DESTINATIONS (7):** Seven tourism regions have been identified and agreed upon to organize aspects of tourism development. These were selected because they are separate hubs based on present and potential tourism flows, existing products, natural resources, cultural resources and physical configuration.

The destinations define the regional extent of tourism products that are either currently offered and/or that could be developed. Those seven destinations have been designated with a letter:

- A. Central Coast Belize**
- B. Northern Belize**
- C. Western Belize**
- D. South Eastern Coast Belize**
- E. Southern Belize**
- F. Northern Islands**
- G. Belize Reef.**

For these destinations the proposed models of development in this NSTMP have been developed according the analysis, potentials, and attractions of each of the different areas within the country.

**SPECIFIC DEVELOPMENT PLANS (5):** Five specific areas have to be studied in greater detail in separate deliverable. These were selected for two reasons: according to the Terms of Reference of the current project (Phase III deliverable); and because of their importance to the existing tourism industry, as well as their potential for tourism development. Thus, on destinations A, C, D and F there will be Specific Development Plans developed in another document.



**A.S. Belize City**

**C.S. San Ignacio**

**D.S. Placencia Peninsula**

**D.S. Stann Creek**

**F.S. Ambergris Caye**

For these tourism destinations the Master Plan proposes a **LAND USE FRAMEWORK** that regulates the nature and typology of the tourism developments. As it is later explained it is tourism oriented and form-based and contends an indicative frame initially addressed to the public authorities, stakeholders and decision makers of any kind.

This NSTMP works with the assumption that this indicative frame should be further developed in order to become a regulatory one.

The different land use categories are organized by districts and specific land uses. The information and the chart are included in the Annex 3 of this NSTMP.

## 2 Introduction

This introduction provides a general description of the planning process and the main elements that coming from the analysis done, have been developed as tools to represent and understand the proposals. The plans that illustrate the process are described and illustrated in subsequent graphic plans section.

### 2.1 General objectives

The main objective of the planning process is to find a physical balance between conservation and development and to generate plans that support the growth of the tourism industry in Belize. In this case, development is tourism driven, and often at the interface between the natural and cultural resources of destinations and the development that brings people to experience those resources.

The more specific objectives are to:

- ▶ Create a model for development and regulation that describes and illustrates the type of tourism development that is acceptable to the stakeholders of Belize, and that will enhance the quality and increase the quantity of tourism.
- ▶ To conserve the natural and cultural assets deemed of high value by stakeholders, and which act as major attractions for tourism.
- ▶ To respond to the analysis of existing and proposed development requirements discussed elsewhere in this report by creating physical plans that respond to that direction.
- ▶ Phase tourism development so that there are opportunities in the near term and for the 20 period from now.
- ▶ Consolidate readily available or easily obtained mapped information into a format that could be used to judge how appropriately describe important resource areas, as well as viable development sites.
- ▶ To judge the appropriate development extent and intensity in each situation.
- ▶ To take a broad look at sustainability with respect to balancing the economic, natural and cultural systems and the needs of Belizeans.
- ▶ To provide a conceptual planning and land use model that considers all facets of the conservation and development mix at regional, local and project specific levels.
- ▶ To provide specific plans for four tourism destinations that shows where and how tourism development might appropriately be considered.

Implicit in these plans and studies is an underlying assumption that it is the relatively unspoiled natural and cultural resources of Belize that brings tourism to the country. Therefore, the extent and intensity of development is conservative, with a leaning to avoid completely any medium or high value resource.

Also implicit is the need to respond to the targeted tourism markets requirements for transportation, lodging, attractions, and other facilities. Of particular importance in this was to increase the diversity of experiences to enhance attractiveness to existing and future visitors to Belize. In the planning process, the objective was to determine what these elements are, to locate them physically, and to describe them in a regulatory framework.

## 2.2 Planning methodology

The planning methodology used for these studies was a simplified, iterative planning model. The steps included:

- ▶ **Data Gathering and Review** of existing mapped data and planning initiatives.
- ▶ **Analysis** of data on the natural and urbanized environment relevant to this planning process in suitable planning areas and destinations. The analysis included mapping constraints to development, such as high value natural areas, as well as opportunities such as vacant land in cities.
- ▶ **Modeling** of the types of development and conservation typologies that respond to the input of stakeholders and other team members.
- ▶ **Draft Master Plans** that locate different types of tourism assets and describe their characteristics and extent.
- ▶ **Final Master Plans** that respond to the review of stakeholders of the draft plans.
- ▶ **Regulatory framework** for use in implementation of the plans and to support the long term objectives of the Master Plan.

The plans that have been generated, It must be noted that mapped data of physical features proved particularly difficult to obtain. Consolidating all of the mapped data within all of the agencies in Belize would greatly enhance future tourism planning efforts and project planning.

## 2.3 Planning areas and destinations

In this study, a simple hierarchy of planning areas has been applied to consider country wide tourism planning issues, as well as specific destinations plans. This hierarchy is as described below.

As shown on the plan sheet, the first set of plans refers to a comprehensive explanation at country scale, they illustrate most of the issues addressed in this chapter and the main development principles to be further developed on smaller scales of work are explained as follows: *regional destinations, specific development plans, special purpose plans*

### 2.3.1 Regional destinations

Seven tourism regions have been identified and agreed upon to organize aspects of tourism development. These were selected because they are separate hubs based on present and potential tourism flows, existing products, natural resources, cultural resources and physical configuration.

These destinations define the regional extent of tourism products that are either currently offered and/or that could be developed. Those seven destinations shown at the map are the following and have been designated with a letter:

- A. Central Coast Belize**
- B. Northern Belize**
- C. Western Belize**
- D. South Eastern Coast Belize**

**E. Southern Belize**

**F. Northern Islands**

**G. Belize Reef.**

### 2.3.2 *Specific development plans*

Per the Brief, four specific areas will be developed in greater detail in another deliverable (Specific Development Plans – Terms of Reference Deliverable of Phase III). These include Ambergris Caye, Placencia Peninsula, Belize City Waterfront and San Ignacio. Since the development models for Placencia Peninsula and the area adjacent to the north were to differ drastically a new specific area was added to the list as Stann Creek ending up with five specific areas.

**A.S. Belize City**

**C.S. San Ignacio**

**D.S. Placencia Peninsula**

**D.S. Stann Creek**

**F.S. Ambergris Caye**

## 2.4 *Types of tourism experiences*

Regarding the types of tourism experiences that will drive growth in the sector, Belize has the potential to become a destination that offers six main types of tourism concepts, namely: Nature-based Tourism, Cultural Tourism, Cruise Tourism, Leisure and Entertainment, Nautical Tourism and Sun & Beach tourism.

Most of these experiences are available now in Belize to some extent. However, all of them need to be further developed to meet the customer's expectations and maximize their potential while minimizing negative environmental and social impacts. Doing this will result in a more sustainable future for the current resources and assets offered in Belize. Physical aspects of each of the general tourism concepts are as follows:

- ▶ **Nature-based Tourism:** is any form of tourism that relies primarily on the natural environment for its attractions or settings
- ▶ **Cultural Tourism:** is a form of special interest tourism based on the search for participation in new cultural experiences, whether they are aesthetic, intellectual, or emotional and relies primarily on heritage sites and living culture expressions.
- ▶ **Sun & Beach Tourism:** this tourism product refers to relaxation activities on or near the beach
- ▶ **Cruise Tourism:** there are two different types of cruise tourists: conventional and pocket cruises; relies on access to land and sites
- ▶ **Nautical Tourism:** It is the navigation and journeying of tourists / boaters in leisure vessels (yachts, boats, sailing, motorboat, charter boat etc.). It therefore requires marinas or boat shelters and water-based activities and sports on or off the vessel navigating in closed seas, rivers, lakes, overseas and oceans onto international waters

- ▶ **Leisure & Entertainment Tourism:** is caters to a relatively young breed of tourist, who is seeking shopping possibilities, escapism, entertainment and fun. It relies on facilities and services.

At a first stage the aim is to define their main areas of influence and the tourism assets that are involved in developing and balancing these product groups. Secondly, it is possible to define the future actions or areas of influence for each product group and where to focus attention and investments.

## **2.5 Considerations on the natural environment**

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Major tourism attractors that differentiate Belize from other Caribbean and Central American destinations are the generally unspoiled natural environment and cultural resources. The Barrier Reef and Cays of Belize, and the Mayan antiquities are world class by any standard. They are, of course, threatened by development of all sorts, as well as harmful environmental practices that often go hand-in-hand with developing economies. The issue is of central importance in developed economies as well, but in those cases resources are available to provide different solutions. In Florida, for example, where high intensity development has permanently altered the water quality of Florida Bay, the State spends \$300 million each year to acquire high value lands for conservation in addition to enforcing strict environmental codes. The simple truth is that if the Tourism Industry in Belize is to provide a long-term benefit to Belize, the natural environment must take center stage in any and all planning regimes.

There is no shortage of concern for this issue in Belize. Indeed, the ranges of studies reviewed for this report are initiated by federal agencies and NGO's as well. There is even an ordinance in place that prohibits the cutting of mangroves. However, as stated elsewhere in this report, existing practices are not consistent nor are they coordinated. Cutting of mangroves, filling of wetlands, failed or non-existent storm water management systems and agricultural practices do not reflect proper consideration of this issue.

As with land use planning, concerted and coordinated conservation of resources is a low cost, high value strategy. Generally, it does not involve high capital investment, rather legislation, rule-making and administration (much of which is already in place). It is possible for developers to fund review of proposed plans by professionals not on staff. Failure to engage in a comprehensive conservation initiative may also result in a significant loss of value.

The conservation model considers available information from existing planning initiatives, primarily the National Protected Areas Plan. It also considers the available maps of Ecosystems so that environmentally sensitive areas that may not be protected are avoided when considering new development. For example, mangrove areas are avoided, and previously disturbed areas are targeted by development. The plans aim is to protect the existing natural and cultural assets from the possible tourism impacts and new developments. When some overlapping occur also to make sure that the impacts are at least compatible with the environment, and that any the effects can be assessed and mitigated

Available mapping limited the extent and precision with which high value ecosystems were identified. Indeed, better organization of the existing data in the hands of various agencies and stakeholders is a necessary step to the next level of planning.

The graphic plan considered about ecosystems in Belize is the number 3 Ecosystems, at a national level. Other ecosystem plans overlapping destination tourism developments will be considered in the site plans of the five Specific Development Plans.

## 2.6 Development considerations and principles

Another major building block of the physical planning effort responds to the experiences identified elsewhere in this report that are needed to enhance and extend tourism development. As a general idea the plans in the present work convey different levels of consideration for planning the different types of development in different areas of the country, and, at different scales.

### 2.6.1 General development typologies

The models or typologies for development considered relate to land occupancy and the increase of tourism. The development models include the following types and intensities of areas and projects. In all of these typologies

#### EXISTING SETTLEMENTS

In existing towns and villages, the models that are applied are described and illustrated below.

- a) INFILL AND COMPLETION OF EXISTING TOWN/VILLAGE
- b) MODERATE GROWTH
- c) PROMOTED GROWTH

#### INFILL AND COMPLETION OF EXISTING TOWN/VILLAGE

The objective in settled areas such as Belize City and San Pedro are to stay within the scale of the existing development, but to fill in vacant or underutilized land to expand tourism offerings. Naturally, coastal land or lands with good views are of greatest importance.





### *MODERATE GROWTH*

To better understand the quality and intensity of development, the photograph below shows what may be planned for infill parcels where moderate growth is considered.



### *PROMOTED GROWTH*

Similarly, where growth is actively promoted for commercial reasons, this image shows a new development as an expansion beyond the edges of a town



### **NEW RESORT VILLAGES**

In previously undeveloped areas, where there are minimal impacts on adjacent natural areas, the models include lodging related products and resort residential. These are illustrated below.

- d) MAINTAIN CHARACTER WITH RESORT HOTEL (very low density)
- e) NEW RESORT / TOWN (low density)
- f) NEW RESORT / TOWN (low - medium density)

*MAINTAIN CHARACTER WITH RESORT HOTEL (very low density)*

In high value landscapes, where limited development will have a high impact on tourism, these types of low density development may be appropriate, particularly in previously disturbed areas.



*NEW RESORT / TOWN (low density)*

Medium density resorts will have a sense of community, and greater densities, but nothing in excess of 3 stories.



### *NEW RESORT / TOWN (low - medium density)*

High density areas for development may be appropriate in high value landscapes, where there is little impact on natural systems.



### **2.6.2 Tourism products**

Considering the specialized categories for the different kind of touristic segments these development models respond directly or indirectly to all of them, as follows:

- **Nature-based Tourism.** These types of development will serve as base camps for nature tours and adventure activities, and can draw development away from the natural areas that are the primary amenity of Belize.
- **Cultural Tourism:** These types of development will also serve as base camps for tours of cultural assets, and keep development away from those resources.
- **Nautical Tourism:** This type of tourism will be based out of these resorts, as well.
- **Cruise Tourism:** These types of development are the best hope of luring cruise visitors back.
- **Leisure & Entertainment Tourism:** The lower intensity, higher quality types of development will lure this market to existing towns and new resorts. Relative levels of comfort and security are sought, but a thrill-seeking disposition may motivate the tourist to look for diverse, often fantastical experiences
- **Sun & Beach Tourism:** This product is most directly served by these development models.



### 2.6.3 Reference density

In judging the value and impact of development, it is necessary to quantify the amount of development that may occupy areas within destinations, or development in specific plans. The physical model of growth (height, land occupation, density of units, etc.) has been simplified and turned into density levels for destination planning. These correspond to the illustrations above. The units should be considered in a generic way as spaces accessible with a key, so it includes hotel rooms, apartments, etc.

- |                     |                |   |
|---------------------|----------------|---|
| 0. UNTOUCHED NATURE | (ref. level 0) |   |
| 1. VERY LOW DENSITY | (ref. level 1) | (around 4 units/acre - 10 units/hectare)  |
| 2. LOW DENSITY      | (ref. level 2) | (up to 20 units/acre - 50 units/hectare)  |
| 3. MEDIUM DENSITY   | (ref. level 3) | (up to 40 units/acre – 100 units/hectare) |
| 4. HIGH DENSITY     | (ref. level 4) | (over 60 units/acre – 150 units/hectare)  |

It should be said that High Density development is rare within Belize or in the plans that have been generated. This level of intensity is only appropriate in high value locations where the opportunity for positive impacts on tourism is possible.

As to retain an image example for each of the mentioned densities:

#### 0 . UNTOUCHED NATURE



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### 1. VERY LOW DENSITY



### 2. LOW DENSITY



### 3. MEDIUM DENSITY



### 4 . HIGH DENSITY





### 3 Proposed Model and Land Use Framework

This section describes the physical planning proposed model for tourism development at a country scale. It intends to provide the stakeholders and decision-makers of Belize with an overall frame useful to place and help find specific actions, actors and developers to bring added value when it comes to develop the existing tourism sector both at national and international level.

This section is coupled with a detailed land use framework (chapter 2.2) at the service of the proposed model, which defines the typologies and products planned for each of the specific sites and development plans.

As later stated in this chapter, this detailed land use framework is aimed to be initially indicative as it will need further development. Nevertheless it should turn into a regulatory frame. As explained after is form based and compared to other typical town planning works is tourism oriented.

The Land Use Framework, or regulatory framework, is based on assumptions and principles gained from the stakeholders, the guidance of the economic planners, as well as sound tourism planning practice.

#### 3.1 Country scale model

##### 3.1.1 Guiding principles

At meetings with stakeholders, certain basic assumptions, as well as principles that would guide all of the planning studies were determined.

The assumptions are that the country is small, but diverse in tourism offerings at a visitor-friendly scale. There is not the large-scale, high-impact development of the northern Yucatan Peninsula, and that is a great differentiator. Introducing large scale development would significantly alter the physical impression of the country, not to mention the challenges to its social and physical infrastructure. The main attractions are:

- ▶ A world-class reef/caye/atoll system that extends the length of the country's coastline
- ▶ Mayan religious monuments which are also world-class as tourism attractions
- ▶ Interior highlands clothed in jungle and laced with unspoiled rivers and cave systems.

All of the destinations are accessible by car and by air as day-trips. Though a developing country, the roads, the roadsides and most settlements and urbanized areas are well-kept. The exception is Belize City, which is neither well-maintained nor is there the perception of security.

Given these assumptions, the following guiding principles were approved, which governed the planning process from start to finish, and should continue to guide any planning done in Belize.

- ▶ Maintain the existing, human scale of urbanized areas and attractions.
- ▶ Maintain and enhance the participation of residents and visitors in the function of urbanized areas.

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- ▶ Conserve the natural resources that are the major attraction of the country. In particular, the barrier reefs – atolls – cayes system, and the mountain jungle.
- ▶ Enhance the existing tourism offerings and add new offerings with respect to lodging and attractions.
- ▶ Maintain the diversity of natural and cultural environments.
- ▶ For antiquities, conserve and enhance visitation opportunities and the experience.
- ▶ For infrastructure, remediate and enhance the urban environment with respect to health and safety.
- ▶ Limited infrastructure development in natural areas or undeveloped areas to maintain the character of these areas.
- ▶ Raise the quality (and value) of all tourism destinations and facilities.
- ▶ Use public investment to guide conservation and development. This primarily addresses access by road and by air.
- ▶ Maintain diversity of high quality tourism offerings as they are available to all visitors staying at all destinations.
- ▶ Define the edges of urbanized areas, particularly where they abut natural areas such as the sea and the jungle.
- ▶ Create regulatory regimes that emphasize consistency with existing scale and character of developed and undeveloped areas.
- ▶ Create regulatory regimes that are consistently applied.
- ▶ Fully understand the issues affecting long term environmental sustainability of the natural resources and put in place regulations to ensure that sustainability.

### 3.1.2 Territorial model

The country's tourism offer in terms of landscape extremes includes both experiences associated with the sea and the densely forested mountains. Probably are the coastal systems that are more exposed to tourism and receive higher numbers of visitors and thus of environmental pressure. On the other extreme the interior or outback of the country has been experience a growth but with lower numbers.

In general terms this plan tries to obtain a better balance developing all the tourism products according to the potentials of the different destinations trying to release the pressure on the coastal areas that concentrate the developments.

On the graphic section, plan number 5 is a synthesis of the national strategy of this NSTMP showing the overall picture for 2030. Growth is planned countrywide with different intensities or models for the different areas and settlements. Here is a relation of the overnight growth ratios by destination being the national average a growth of 2.88.

- ▶ Central Coast Belize: 2.92
- ▶ Northern Belize: 3.25
- ▶ Western Belize: 2.03
- ▶ South Eastern Coast Belize: 6.25
- ▶ Southern Belize: 6.12

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- ▶ Northern Islands: 1.82
- ▶ Belize Reef: 2.15

As contained in the different chapters of this NSTMP, when it comes down to the most visited or tourism developed areas the development strategies could be as follows:

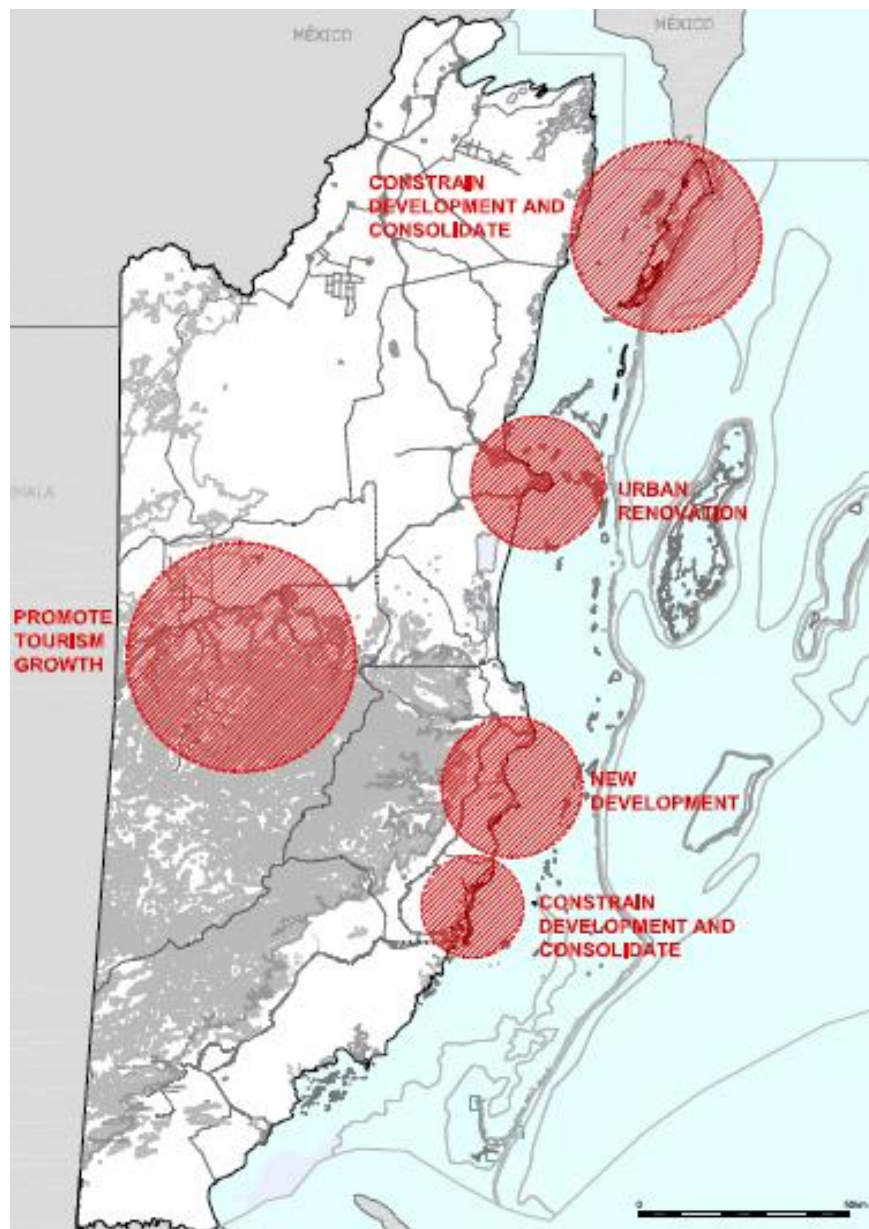
BELIZE CITY: Urban renovation

SAN IGNACIO: Promote tourism growth

PLACENCIA PENINSULA: Contain development and consolidate

STANN CREEK: New development

AMBERGRIS CAYE: Contain development and consolidate



## 3.2 *Land use framework*

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From a tourism development perspective, there are good and bad ways to attract quality development and developers through land use planning. The good way is through:

- ▶ Clear development standards that are consistently applied
- ▶ Clear and transparent entitlement processes that provide predictability to the permitting and development process
- ▶ Unified administration of the above.

Public participation guided by good leadership working under well-coordinated planning regimes.

This Land Use Framework is a first step towards visualization and definition of these Guiding Principles for tourism related development. It can and should be used as a basis for land use planning of each of the areas designated in this study. The Framework may also be used as a basic typology for land use regulations such as; zoning for cities, towns or villages: land use plans for larger area such as districts: and special purpose plans for environmentally sensitive areas.

In the present chapter it is included a short description of the different districts and land use categories. The **Annex 3. Land Use Framework** contains the full model with all the details and parameters for each of the different specific land uses. These Districts and Specific Land uses are used in the plans to define specific areas accordingly and when appropriate.

This Framework is different than most zoning or land use typologies in that it is directed towards tourism development and conservation of tourism assets (as can be seen from designations such as "resort" and "hotel"). Also, and, it is form-based. That is, it addresses the way buildings look and interact with other buildings to form urban spaces such as plazas or squares or to have limited visual impact on natural areas. In this way, the Town/Village Center is a group of buildings that define a central square which typically functions as a central gathering place for towns in Belize. Similarly, it considers how buildings look and interact with natural areas. This will become more clear in application of the Framework to a plan, but the intention is to describe and define development that looks and feels authentic within the historical and cultural environment that is one of the pillars of tourism.

Altogether, this Framework is general in nature corresponding to the general nature of the plans in this study, and, more importantly, to the need for a readily comprehensible tool for Tourism Planning by all Stakeholders. It is not a code for zoning or land use, which will require more detailed structure to become legally binding. At the same time, this Framework is a draft, and as it is reviewed by the Stakeholders and applied to land use plans, there may be land use designations that need to be added.

The use of the Framework has two steps. First is to understand the general land use of the area or district. For this, general Land Use Districts are applied as follows:

### 3.3 Land Use Districts

- I. Existing Town/Village – for example, Belize City, San Pedro, San Ignacio
- II. New Town/Village Resort – for example, The Placencia
- III. Resort – such as the San Ignacio hotel
- IV. Conservation – Bacalar Chico
- V. Special Purpose Area – Ambergris Caye and Placencia Peninsula

Once the district is established, refer to specific land uses for each as listed below:

#### 3.3.1 Specific Land Uses

**I. Existing Town/Village (ETR):** Enhancement or regeneration of existing, high-character villages and resorts with civic improvements and appropriately scaled tourism development.

- **Existing Town/Village (etv).** A general designation for towns, portions of cities and villages that are identified as having significant character and views, and are selected for regeneration and development for tourism.
- **Town/Village Center (tvc).** Medium density, clustered, mixed use development that serves as the central commercial area of a Village.
- **High Street Commercial (hsc).** Street organized by retail and restaurants that acts as an entertainment destination for residents and tourists
- **Leisure Destination (ld).** Single attraction for tourists and residents such as a theme park
- **Market (mkt).** Permanent site with both permanent and temporary booths selling fresh food, crafts and other items that attract visitors and tourists
- **Urban Waterfront Promenade (uwp).** Mixed use area with higher intensity commercial, residential and institutional uses oriented towards the water and a marina
- **Beach Front Destination (br).** Beach oriented retail, hotels, restaurants and bars in a linear organization along a beach that functions as circulation and for bathing and boating uses
- **Infill Residential (ir).** Residential built between existing homes at a similar scale and separation
- **Neighborhood (nh).** Multiple unit, medium density single family or multi-family development built within the urbanized area of an existing village. It may be associated with, and serviced by a hotel or guest house
- **Waterfront Residential (wr).** Single and multifamily residential on the water
- **Town / Village Hotel (h).** Village scale hospitality facility built within or contiguous with a village, at a compatible scale. May include a spa, restaurants and be attached to, or provide service to Village Residential
- **Civic (civ).** Administration, education, health care, public entertainment venues, religious and any other facility providing public services. Will be at a compatible scale and mass with the existing Village, but may service more than one Village



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- **Plazas/Parks (p).** Small, urban park surrounded by buildings and providing the Village with a central gathering places
- **Town / Village Buffer (bf).** An open space used to separate incompatible land uses, or to preserve views from a Village to high value landscapes
- **Priority Redevelopment Areas (pra).** Regeneration of urban fabric with remarkable lacks and drawbacks at present, including heritage / cultural attributes, mixed use or other elements of special interest for local people and tourists. It could include strategic empty lots with high potential for renovation.
- **Resort (r).** Existing Resort, cluster of hotel services, rooms, suites and limited serviced residential with possible restaurants and spa.

### II. New Town/Village Resort (NVR): Large scale, mixed use resort community with clustered, high intensity, high quality development for tourism and resident population.

- **New Village (nv).** Large scale, mixed use resort community with clustered, high intensity, high quality development for tourism and resident populations. New Village Resorts are built to function as a destination resort, but look like a traditional village.
- **Village Center (vc).** Mid and High density, clustered urbanized area, with full mix of uses including hotels, residential, commercial and civic facilities. This will be a new centrality, as well as an attraction for the Area. New Towns may also be resort-oriented with major recreational facilities such as golf. They may also be focused on a cultural facility such as a university or research park
- **Market (mkt).** Permanent site with both permanent and temporary booths selling fresh food, crafts and other items that attract visitors and tourists
- **Leisure Destination (ld).** Single attraction for tourists and residents such as a golf course, club or theme park
- **Resort Hotel (rh).** Hospitality serving business or tourism within a Town Center. May also include Hotel Serviced Residential, a spa and some limited retail
- **Resort Villas (rv).** Single family residential development for the tourism market
- **Resort Residential (rres).** Residential development developed for the tourism market with unified architectural design and in multifamily configuration
- **Resort Reserve Residential (rr).** Very low density, conservation oriented residential area within high quality forest or agricultural area within a New Town
- **Resort Recreation (rrec).** Clustered residential area with single, or multifamily development. Will have recreational amenity such as golf or a marina, and may be connected to a Resort Hotel for service
- **Urban Waterfront Promenade (uwp).** Mixed use area with higher intensity commercial, residential and institutional uses oriented towards the water and a marina.
- **Civic (civ).** Administration, education, health care, public entertainment venues, religious and any other facility providing public services



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- **Plazas/Parks (p).** Active recreational fields and gardens connected to the Town Center or within a neighborhood
- **Buffer (bf).** Open space that serves to insulate incompatible land uses from one another
- **Green Way or Open Space (gw/os).** High value forest or agricultural area within a New Town, connected to a network of similar areas that provide trail connections to all neighborhoods

**III. Resort (RT):** Tourism directed hospitality, serviced residential, resort residential and recreational amenities (such as golf). Generally not large or complex enough to be a New Town/Village Resort.

- **Resort (nvr).** Tourism directed hospitality, serviced residential, resort residential and recreational amenities (such as golf). Generally not large or complex enough to be a New Town/Village Resort
- **Resort Hotel (rh).** Stand alone, cluster of hotel services, ooms, suites and limited serviced residential with restaurants and spa
- **Resort Residential (rr).** Clustered residential area with single, or multifamily development. Will have recreational amenity such as golf or a marina, and may be connected to a Resort Hotel for service
- **Resort Reserve Residential (rrr).** Very low density, conservation driven residential where homes are sited within forest, along the water or next to agriculture, but conserving the majority of land in its natural use
- **Resort Recreation (rrec).** Golf, a marina, a spa, health facility or other recreational amenity that supports the operation and value of a Resort
- **Resort Buffer (rbf).** Open space that separates two incompatible land uses

**IV. Conservation (CON):** High value marine, forest and agricultural areas in need of conservation. Where appropriate, accommodating very low density, conservation driven development in residences and lodges.

- **Marine low density (mld).** Marine related area with very low density residential in upland areas
- **Marine Lodge (ml).** High or medium value marine area or island within which a low density, conservation oriented lodge is located along with a spa, restaurant and nature oriented amenities
- **Marine Recreation (mrec).** Permanent or temporary facility for transient use such as picnicking, fishing or diving
- **Forest low density (fld).** High or medium value forest area within which high value homes are located so as to preserve most of the forest
- **Forest Lodge (fl).** Medium value forest area within which a low density, conservation oriented lodge is located along with a spa, restaurant and nature-oriented amenities

- **Forest Recreation (frec).** Camping, picnic or guide facility located within a Forest Preserve
- **Agriculture Preserve (agp).** High value agriculture with no development
- **Agriculture low density (agld).** High or medium value agriculture within which high value homes are located so as to preserve the agricultural operation
- **Agriculture Lodge (agl).** High or medium value agricultural area in which a low density, conservation oriented lodge is located along with a spa, restaurant and other amenities
- **Existing Protected Areas (epa).** High value environmental area, implementation of existing laws under the current system of National Protected Areas (Forest Reserve, Nature Reserve, National Park, National Monument, Wildlife Sanctuary, Marine reserve, etc).
- **Water Elements Improvement (wei).** Canals, rivers or any other water element related to urbanized areas that need special treatment or improvement of its function according leisure and recreation purposes in accordance and mitigating the impact on the natural environment.

**V. Special Purpose Areas (SPA):** High value natural and cultural resource areas that require a Special Purpose Plan that is based on protection of the resource and visual resource analysis. Generally, this means no development, limited or low density development.



- **Special Purpose areas (spa).** High value natural and cultural resource areas that require a Special Purpose Plan that is based on protection of the resource and visual resource analysis. Generally no development or limited, low density development.
- **Antiquity (ant).** High value antiquity from Mayan, religious or other history. Special Purpose Area Plan should first consider conservation and protection of the resource, and then the quality and type of surrounding development, if any
- **Archaeological Study Area (asa).** Area with Antiquities or Cultural Resources, or believed to have Antiquities or Cultural Resources, where excavation and study is underway or planned to be underway
- **Heritage Cultural destination (hcd).** Current cultural resource, such as a church, recreation area or outdoor market and that is not an Antiquity
- **Marine Landing Area (mla).** Waterfront conservation area that may also have tourism oriented installations such as picnic areas, a dock or other leisure activity
- **Water Resource Area (wra).** Catchment area or watershed where water collects to form a stream or well field
- **Ecologically Sensitive Area (esa).** High value habitat for a mix of flora and fauna
- **Sensitive or Vulnerable Landscapes (svl).** Scenic area with high value landscapes within the viewshed of a road, village or other public facility
- **Scenic Byways (scb).** Road with views of high value landscapes, and a pleasing alignment with limited development of the margins
- **Special Places (sp).** Places designated as important to the visitors and residents of the Area

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Within the full matrix, a number of illustrations, descriptions and criteria are presented to provide an objective model for each land use. These columns include:

1. Proposed Classification. These are the names for each of the Districts and Specific Land Uses listed above.
2. Code. This is an abbreviation for each District or Specific Land Use that may be used for mapping.
3. Land Use Concept. A brief description of each land use.
4. Development or Use Plan. These are simple black and white building and space diagrams that illustrate typical arrangements in plan for each land use.
5. Image. These are photographs that show what each land use might look like.
6. Site and Design Issues. Locational, site quality issues, and design quality issues.
7. Land Use Restrictions. Conditions that do not work with the land use.
8. Estimated Minimum Land Area. The minimum amount of land generally required for the development of a land use.

The image below as a sample extract from the tables included on Annex 3 shows the look of the first 8 columns for the district *Existing Town / Village* as is has just been exposed:


I. LAND USE DISTRICTS							
Proposed Classification	Code	Land Use Concept	Development Plan Example	Image	Site and Design Issues (location, adjacency, physical features)	Land Use Restrictions	Estimated Minimum Land Area
Existing Town/Village	ETR	An existing Town or Village, that is reorganized or enhanced to function as a living and a resort community. Each Town or Village will require a strategy for redevelopment that addresses its physical features, historic character, value for development and tourism potential.			Towns and villages will require adequate land to mix new resort facilities with existing development, enhancing urban open spaces, maintaining architectural scale and character, and creating development opportunities to fund redevelopment.	A general designation to be used for large scale land use planning prior to specific land use planning according to categories below.	25 Hectares

For Specific Land Uses, additional criteria include:

1. Permitted Uses. Land uses permitted.
2. Prohibited Uses. Land uses that are not allowed.
3. Typical Maximum Building Height. In stories, but the main criteria is to be similar to surrounding, existing land uses or to work within the context of the existing environment.
4. Typical Maximum Building Area, Coverage or FAR. The amount of building area allowed as a percentage of site area.
5. Typical Build-To Line. In places such as a High Street, it is important for buildings to be close to the street.
6. Typical Minimum Set Backs. In less urban environments, the distance between buildings is described.
7. Typical Open Space Requirement. Large scale land uses have requirements for a percentage of the land to be in open space.
8. Typical Minimum Frontage. So that the frequency of building along a street can be maintained, or access to the land use provided.
9. Typical Density per Hectare. The number of units, such as residential, per hectare.

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The image below as a sample extract from the tables included on Annex 3 shows the look of the columns from 9 to 17, for the Specific Land Use. *Urban Waterfront Destination* as is has just been exposed:

Proposed Classification	Code	Land Use Category	Developments in Use Plan (Exposure)	Image	Use and Design Issues (Residential, Commercial, Industrial, etc.)	Land Use Restrictions	Permitted Use	Prohibited Use	Typical Minimum Property Size	Typical Maximum Building Height (Feet)	Typical Maximum Building Area (Square Feet)	Typical Maximum Building Area (Square Feet)	Typical Maximum Building Area (Square Feet)	Typical Maximum Building Area (Square Feet)	Typical Maximum Building Area (Square Feet)	Typical Maximum Building Area (Square Feet)	Typical Maximum Building Area (Square Feet)
Urban Waterfront Destination	UW1	Urban Waterfront Destination	Urban Waterfront Destination		Use includes urban and commercial with high density residential and commercial and associated infrastructure. Urban waterfront area includes urban and commercial and associated infrastructure. Urban waterfront area includes urban and commercial and associated infrastructure.	Urban waterfront area includes urban and commercial and associated infrastructure. Urban waterfront area includes urban and commercial and associated infrastructure. Urban waterfront area includes urban and commercial and associated infrastructure.	Urban waterfront area includes urban and commercial and associated infrastructure. Urban waterfront area includes urban and commercial and associated infrastructure. Urban waterfront area includes urban and commercial and associated infrastructure.	Urban waterfront area includes urban and commercial and associated infrastructure. Urban waterfront area includes urban and commercial and associated infrastructure. Urban waterfront area includes urban and commercial and associated infrastructure.	Urban waterfront area includes urban and commercial and associated infrastructure. Urban waterfront area includes urban and commercial and associated infrastructure. Urban waterfront area includes urban and commercial and associated infrastructure.	Urban waterfront area includes urban and commercial and associated infrastructure. Urban waterfront area includes urban and commercial and associated infrastructure. Urban waterfront area includes urban and commercial and associated infrastructure.	Urban waterfront area includes urban and commercial and associated infrastructure. Urban waterfront area includes urban and commercial and associated infrastructure. Urban waterfront area includes urban and commercial and associated infrastructure.	Urban waterfront area includes urban and commercial and associated infrastructure. Urban waterfront area includes urban and commercial and associated infrastructure. Urban waterfront area includes urban and commercial and associated infrastructure.	Urban waterfront area includes urban and commercial and associated infrastructure. Urban waterfront area includes urban and commercial and associated infrastructure. Urban waterfront area includes urban and commercial and associated infrastructure.	Urban waterfront area includes urban and commercial and associated infrastructure. Urban waterfront area includes urban and commercial and associated infrastructure. Urban waterfront area includes urban and commercial and associated infrastructure.	Urban waterfront area includes urban and commercial and associated infrastructure. Urban waterfront area includes urban and commercial and associated infrastructure. Urban waterfront area includes urban and commercial and associated infrastructure.	Urban waterfront area includes urban and commercial and associated infrastructure. Urban waterfront area includes urban and commercial and associated infrastructure. Urban waterfront area includes urban and commercial and associated infrastructure.	Urban waterfront area includes urban and commercial and associated infrastructure. Urban waterfront area includes urban and commercial and associated infrastructure. Urban waterfront area includes urban and commercial and associated infrastructure.

Together, this information will be an adequate description for each area on the plans for specific areas, as well as a foundation for all manner of land use planning regimes.

As previously stated the full information of the Land Use framework it is included on the **Annex 3. Land Use Framework** In this master plan. Each of the five districts has been placed in a different page.

Besides, the NSTMP for Belize includes one more annex regarding land use and environmental strategies (see **Annex 2. Land Use Strategies**).

## 4 Destinations

As explained on chapter 1.3, seven tourism regions have been identified and agreed upon to organize aspects of tourism development. These were selected because they are separate hubs based on present and potential tourism flows, existing products, natural resources, cultural resources and physical configuration.

These destinations define the regional extent of tourism products that are either currently offered and/or that could be developed. Those seven destinations shown at the map are the following and have been designated with a letter:

- A. Central Coast Belize**
- B. Northern Belize**
- C. Western Belize**
- D. South Eastern Coast Belize**
- E. Southern Belize**
- F. Northern Islands**
- G. Belize Reef.**

Before focusing on each of the destinations later in this chapter (sections 3.2. to 3.8.) we start with an overall picture of the country (section 3.1.)

### 4.1 Country layout

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On the graphic section of this Master Plan, the maps at a country scale are placed in the beginning and are designated with a number, whereas the maps on the different destinations within the country are designated with a letter from “A” to “G”.

#### *Objectives*

Objectives for conservation and development include:

- ▶ Keep the existing values using a strategy based on conservation
- ▶ Base the developments on principles of sustainability such as compact nuclei and promotion of energy efficiency technologies
- ▶ Balance and improve the existing tourism products and attractions reducing the impact on the natural environment
- ▶ Generate new products so as to increase the Tourism offer
- ▶ Turn the cruise ship visitor industry into a positive impact to the tourism sector by benefiting of the high numbers of visitors that brings.



## Proposals

Tourism development model for Belize- National level (2030)	
Development	High value/low impact
Density	1 – 2 – 3
Overnights (2030)	5.895.376
Overnight growth (2010 – 2030)	2,88
Hotel rooms (2030)	13.754
New hotel rooms (2010 – 2030)	6.869



## MODEL OF DEVELOPMENT

The model has been exposed on section 2 on the chapter *Territorial Model*.

In general terms the plan tries to obtain a better balance developing all the tourism products according to the potentials of the different destinations.

- Growth for **Central Coast Belize** is planned to be very closed to the national average as it already has a bigger offer in terms of quantity.
- **Northern Belize** is planned with a growth just over the average but for this destination it supposes a major growth since the number of visits is more limited at present
- **Western Belize** is planned with a sustained growth targeting smaller facilities or eco-lodges with very low density and higher segments of the market
- **South Eastern Coast Belize** has the biggest growth in the plan since the proposal is a new development on part of the coastline in order to focus the investments nationwide and allow conservation of the other destination within the country and Placencia Peninsula just to the south.
- **Southern Belize** is planned with a very big growth in terms of the growth ratio. In this case the ratio is not a good indicator since the current number of rooms is extremely low compare to the other destinations and the size of Punta Gorda.

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- For **Northern Islands** the growth ratio is below the average since Ambergris Caye is at the limit of its carrying capacity and there is a big number of empty compounds and unfinished constructions that should be reconverted according to the needs.
- **Belize Reef** is slightly below the average but in this case again the quantity of room at present is very low

### REFERENCE DENSITY

As described in section 1 of this plan, depending on the specific area, the density varies ranging generally from level 1 up to level 3. Level 0 is also part of the proposed reference density of this plan, including all the areas where there is not any proposed intervention or growth.

Level 4 has been discarded as being rare in the country and considered inappropriate for the quality standards and the long term benefits for Belize.

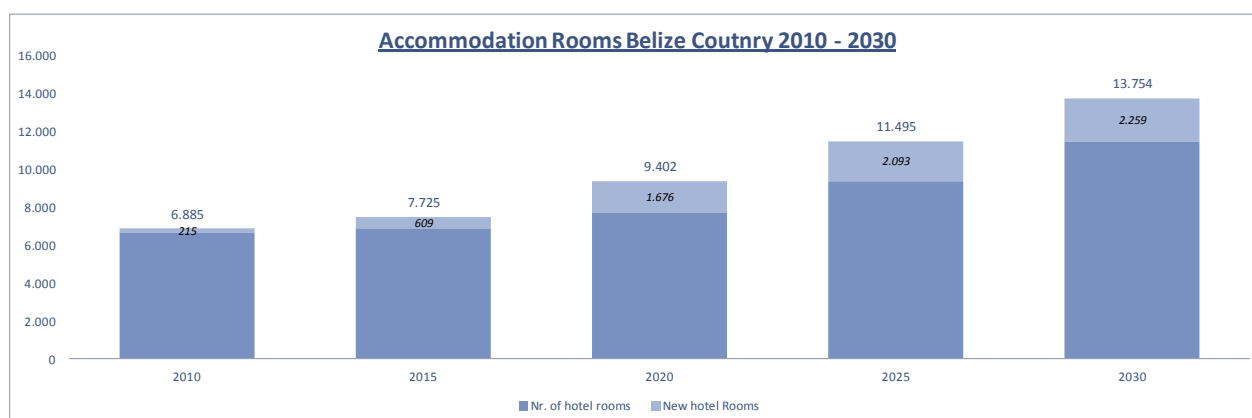
Predominant densities countrywide are 1 and 2, as these compose most of the human scale landscape in the country. As for level 3, it is only applied to very specific dense areas. These areas are either:

- ▶ bigger cities (Belize City or San Ignacio)
- ▶ middle size towns that currently have a very limited tourism offer (Punta Gorda)
- ▶ areas proposed for new developments from scratch (north from Riversdale at Stann Creek)
- ▶ L&E are to be develop in Corozal District where big growth has already been happening

### ACCOMMODATION GROWTH MODEL

By 2030, Belize's tourism accommodation sector is expected to hold a total of 13,754 hotel rooms of which at least 70% should be classified between mid to high-end luxury for international standards.

In phase I of the NSTMP, from 2011 to 2020, the target is to develop 2,517 new hotel rooms. In phase II, from 2011 and 2030, the intensity of new hotel room development is to increase and a further 4,352, reaching a total of 6,869 new hotel rooms by 2030. Hence from the total new tourist accommodation rooms, 36.6% will be built phase I and 63.4% in phase II with a compound average growth rate CAGR of 3.7%. New rooms projections shown in the table below:



The total number of new rooms refers to those that would be built in the time interval of previous five years  
Source: T&L, 2011.

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Between 2012 and 2014, new hotel accommodation projects are recommended to be defined. During these first years, developers should search for the most adequate operators and investors. Special focus is suggested to be given to the research and attraction of international hotel brands especially for Belize City. Meanwhile, country wide incentives are recommended to be provided to the hotel and accommodation sector for the restoration, embellishment and modernization of the existing tourism lodging facilities. Some colonial heritage could be converted into hotels and boutique hotels. In some destinations, the presence of condominiums is regarded to be ineffective for the destination's sustainable economic growth. Therefore, T&L suggest assessing the possibilities of restructuring these into hotels and/or serviced accommodation facilities. All destinations are scheduled to experience considerable hotel development growth, except one. Belize Reef is mostly expected to be structured as day visitation destination rather than overnight tourism; hence it will only develop very few additional accommodations between 2025 and 2030.

As shown in the previous graph, T&L used the official occupancy rates and calculated overnights generated by destination. Based on the official number of tourism accommodation facilities (2010: 6,885 rooms) the sector is expected to close to double in new hotel room development by 2030 in order support the expected tourism overnight growth.

However, before intense hotel development can be foreseen an in-depth analysis and statistical database on Belize's quantity and international quality standards of the tourism accommodation sector needs to be introduced. Additionally, a crucial tool for accommodation development is the classification and monitoring of Belize's hotel and accommodation sector

### TOURISM PRODUCTS

The main tourism products are selected strategic product concepts for the development of the country; they have been selected based on their competitiveness-importance-attractiveness from a long list of options. They are main tourism motivations that encompass many tourism activities under their product portfolio such as diving, sports fishing, caving, and temple hopping, among others. The product development concepts for Belize are as follows:

- ▶ **The Nature-based Tourism** organizes Belize's ecotourism and adventure tourism products into a system of themed natural and man-made nature-tourism concepts structured into integrated recreational ecotourism and adventure sites and centers. In addition, it designs diverse nature-based themed routes and trails, such as the National Nature Tourism Trail System and a National Caving Trail System, catering to the interests and needs of different niche segments. It encompasses both inland and water based nature recreation and adventure activities all over the country.
- ▶ **The Cultural Tourism** product concept focuses on the development of cultural heritage and living culture sub-products. Its flagship creation is the development on a National Museum of Anthropology that will be strategically located in San Ignacio town. It defines the integral development Mayan Heritage sites as a homogeneous tourism concept for all Mayan archaeological sites. Additionally it focuses on the creation of a link of *enchanted villages* with a charming Belizean style appeal, rural tourism sites and routes and temporal tourism attractions such as traditional markets, festivals and themed programs. It focuses on archeological heritage sites and living culture expressions across Belize.
- ▶ **The Sun & Beach Tourism** suggests the integral development of sun & beach resort areas, pristine beaches and waterfront experiences in strategic locations of the coast of Belize and reef islands, namely South Eastern Coast, in Southern Coast, Northern Islands and reef islands. North Riversdale in south eastern coast of Stann creek and Punta Negra in southern coast should be highlighted as new promoted and development locations including this product.

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- ▶ **The Cruise Tourism** aims to structure Belize city and surrounding destination tourism assets as a structured and well managed set of attractive facilities and sites, such as Belize city waterfront experience and embellishment of Belize city colonial heritage neighborhoods, with an interactive welcome center in the Fort George area. Additionally, it introduces the pocket cruise (small cruise vessel) model as a viable option for cruise visitation for Southern Coast Belize.
- ▶ **The Nautical Tourism** structures a system of marinas, ports and services aimed at attracting tourist journeying in vessels (yachts, sail boats, boats, charter boats) across the Caribbean to come to Belize. Additionally, it aims to support the creation of yacht and sail clubs that link with international clubs and attract loyal customers.
- ▶ **Leisure and Entertainment** concept is associated to a mid to high shopping and entertainment destination as it will have fully developed an attractive open-air mid-high end shopping center hosting brand names, restaurants, cafes, bars and entertainment facilities. The target area of development is in Corozal envisioned to be highly accessible by land, boat and border crossing. In a second order the concept is to be adapted and implemented in Belize City and San Pedro.

### 4.2 Central Coast Belize

Central Coast Belize Destination is identified to be day-visitor destination mostly visited by cruise ship passengers and an overnight destination due to the location of the international airport, and the recreational debarkation/embarkation landing. This landing area receives over 300,000 cruise passengers a year, and is also the landing for coastal ferries as well as nautical tours and water taxis.

By 2030 Central Coast Belize will be dominated by a vibrant tourism Belize City with a combination of preserved colonial heritage architecture and modern entertainment facility. Will host brand name hotels as well as traditional style boutique hotels, for a growing overnight tourism market and various facilities for cruise and yacht and sail clubs. It will be the main hub for conventional cruise arrivals that will benefit from Belize's City cultural offering as well as sourcing nature based tourism motivations and links to other destinations.

On the graphic section of this Master Plan, the maps for this destination are designated with letter "A".

#### Objectives

Objectives for conservation and development include:

- ▶ Redevelop Belize City Waterfront including cruise landing / departure area and marina facilities
- ▶ Completion and urban renovation of Belize City Historic District
- ▶ Improve essential infrastructures and services to promote Belize City as an overnight destination
- ▶ Renovate, enhance access and increase the tourism attractors and services to consolidate the existing and potential flows both in the city and outside the city
- ▶ Development of a new cruise port facility to support expected increase cruise visitor arrivals

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### Proposals

Tourism development model for Central Coast Belize (2030)	
Development	Infill
Density	3
Overnights (2030)	897.376
Overnight growth (2010 – 2030)	2,92
Hotel rooms (2030)	2.026
New hotel rooms (2010 – 2030)	1.039



### MODEL OF DEVELOPMENT

As for the development model there is an specific strategy for Belize City explained in more detail in section 4. The approach in terms of physical planning is to focus on urban renovation of the Central Historic District neighborhood, where at present tourism related activities do happen. The icon on the maps thus designates infill and completion of the existing town / village.

Is around the Historic district and on the north side of Haulover Creek and the waterfront where we can find most of the hotels, other accommodation formulas, the cruise landing and departure areas and most of the tourism attractors in the city (museum, restaurants, Fort George street village, water taxis, boat regular services, fishermen, open air market, casino, etc.)

The master plan proposes also to develop a very low density resort around Lamanai archeological site since it is one of the most visited attractions of the country. Considering the existing natural environment, the complex should be design maintaining the existing character.

According to what it has been said about Lamanai, the proposals for the archaeological sites should include, in limited areas, the possibility to build high quality lodging because general land use areas generate revenues that can contribute with fees to maintenance

### REFERENCE DENSITY

As described in section 1 in this document, the planned densities for the projects to develop is up to level 3 (30 to 40 units per acre) for Belize city since the central areas of the larger cities need concentration, density and a good mix of uses to generate diversity and maintain the economic activities and attractions for tourism.



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As for the infill projects within old urban fabrics such as the old historic center with British period wooden houses around the museum and the municipality should not exceed the density or height of the neighboring buildings or blocks. For the symbolic or specific sites such the ones on the waterfront the density can be increased up to the maximum of level 3 as mentioned

The reference density for the proposed very low density resort around Lamanai is level 1, ranging from 1 to 4 units per acre

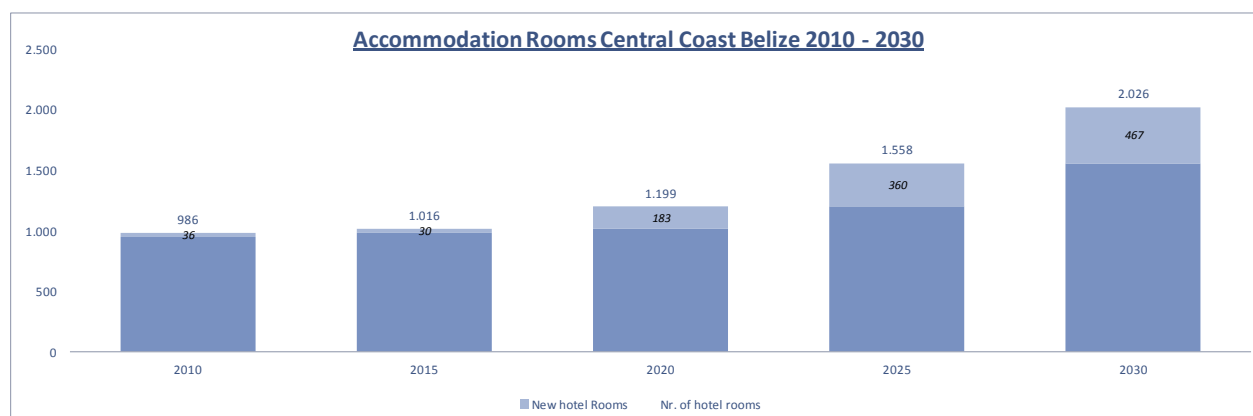
- ▶ Level 1 (around 4 units/acre - 10 units/hectare): Lamanai archeological site
- ▶ Level 3 (up to 40 units/acre – 100 units/hectare): Belize City

### ACCOMMODATION GROWTH MODEL

Central Coast Belize's tourism accommodation development is expected to develop 1,039 new hotels rooms by 2030. It is expected start with the opening of 30 new hotel rooms in 2015. No additional hotels are recommended to be introduced before 2015, in order to maintain the occupancy rate on a healthy growth path.

From 2012 to 2020, Central Coast Belize will develop 212 new hotel rooms and a further 827 from 2021 until 2030, reaching a total of 1,039 new hotel rooms between 2012 and 2030.

Between 2012 and 2014, new hotel accommodation projects are recommended to be defined. During these first years, developers should search for the most adequate operators and investors. Special focus is suggested to be given to the research and attraction of international hotel brands in Belize City. Meanwhile, special incentives are recommended to be provided to the hotel and accommodation sector for the restoration, embellishment and modernization of the existing tourism lodging facilities. Some colonial heritage could be converted into hotels and boutique hotels.



The total number of new rooms refers to those that would be built in the time interval of previous five years  
Source: T&L, 2011.

### TOURISM PRODUCTS

**Cultural tourism and Cruise tourism** are the two main tourism products identified for Central Coast Belize; hence these will be the main motivation for travelling to the destination. **Nautical tourism, Nature-based tourism and Leisure & Entertainment** tourism are regarded to be secondary tourism motivations.

### Main tourism products

- ▶ **Cultural Tourism** is suggested to be offered with **mid-high quality** facilities and infrastructure. The planning will introduce the Integral Development of Mayan sites Concept at Altun Ha and further focuses on Belize City's cultural tourism development (restoration of colonial heritage architecture, revitalization of historic sites, etc.). These modifications will disperse the tourism flows into wider area of the city and destination, and provide enhanced local participation in tourism.
- ▶ **Cruise Tourism** is a crucial tourism product which directly affects Belize City and its surrounding areas. It is recommended to offer cruise tourism as a **mid quality** product and improve its management and visitor flows. In particular, visited attractions are of great concern in terms of the environmental impact of the increased volume of cruise ship passengers visiting. Based on this, visited sites require a carrying capacity assessment and visitor management plans which can be implemented and laws that can be enforced.

On behalf of cruise tourism, Belize City will undergo great urban changes and remodeling of the Fort George Terminal, the wider area of the terminal, a new entertainment area including a waterfront experience, the embellishment of Belize River and its surrounding houses and renovated bridges to further access southern parts of the city. A second cruise port facility is expected in order to accommodate the growing sector.

Furthermore, the infrastructures at dedicated cruise tourism destinations, sites, attractions and activities in order to cater for large tourism crowds (such as in Northern Belize – Lamanai and Altun Ha) will be developed.

### Secondary tourism products

- ▶ Central Coast Belize's **nature-based tourism** product consists of the developing ecotourism activities such as bird-watching sites such as Northern and Southern Lagoon and to develop further man-made facilities to diversify the nature-based activities local offer.
- ▶ **Nautical Tourism:** water recreational activities should be developed by offering **high-mid tourism products**, facilities and infrastructure. With regard to the consideration of developing a marina for small boats, it is not feasible to develop it at the Salt Creek and the Midwinter Lagoon. However, recommended sites for the development of marinas are directly located in Belize City. The development will introduce new overnight-docking marinas attracting small yachts and sailing boats along with mix development use offering.
- ▶ A smaller version of the **Leisure & Entertainment Tourism** concept is suggested to be presented in Belize City, in the form of an attractive and concentrated area for mid/high end shopping, edutainment and entertainment that caters to market segment that visits Belize City as well as local demand.

Central Coast Belize will first implement projects to improve the current situation of cruise tourism and execute actions to enhance the cruise visitor's experience. Cultural tourism development is expected to start at the same time with restoration and embellishing of the city. Nautical tourism facilities is to be developed on a third order, whereas nature-based and L&E are concepts to be developed in the second phase of the NSTMP.

		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Central Coast Belize	Culture																				
	Nature-based																				
	Cruise																				
	Nautical																				
	Leisure & Entertainment																				

### 4.3 Northern Belize

By 2030 in this region we find easy access to a prosperous Corozal town hosting a mid-high end Leisure & Entertainment center. Additionally, in Orange walk district will be benefiting from rural tourism activities and the integrated development of Mayan Heritage sites. More cross border movement will be promoted with the diversity of offering in the following border regions:

- ▶ **Corozal:** Will be established as a mid-to-high shopping and entertainment destination as it will have fully developed an attractive open-air mid-high end shopping center hosting well-known brands, restaurants, cafes, bars and entertainment facilities such as casinos, theaters, and bowling alleys, among others. The area will have good access by land, boat and border crossings. As a secondary motivation it will host cultural and nature tourism product offering such as Shipstern Nature Reserve, Corozal Bay, Sarteneja and the manatees.
- ▶ **Orange Walk:** The destination will be hosting diversified cultural heritage, living traditions and nature based eco-tourism products with high involvement of local rural communities. It will cater to a well managed cruise visitors market while establishing a growing overnight sector.

On the graphic section of this Master Plan, the maps for this destination are designated with letter “B”.

### Objectives

Objectives for conservation and development include:

- ▶ Promote the rich cultural and natural sites on the north, facilitating access and creating specific products such as visits to the Mennonites compounds
- ▶ Consolidate and increase accommodation offer to boost Corozal and Orange Walk overnight stay tourism
- ▶ Promote the growth and develop L&E facilities expanding the existing ones or planning new spaces

### Proposals

Tourism development model for Northern Belize (2030)	
Development	Infill/ moderate/ growth
Density	1 – 2 – 3
Overnights (2030)	651.310
Overnight growth (2010 – 2030)	3,25
Hotel rooms (2030)	1.583
New hotel rooms (2010 – 2030)	1.040



## MODEL OF DEVELOPMENT

As for the development model the idea is to encourage a moderate growth both for Orange Walk and Corozal, considered as base camp areas for visitors discovering the neighboring attractions and thus to increase the overnight in both towns.

Complementary to Corozal and especially around the nature-based product, the model for infill and completion of empty lands inside the towns is planned for Chunox and Sarteneja. Therefore the growth in extension should be focused on the edges of Corozal.

As being one of the goals for the destination to attract regional boarder cross movement, the promoted growth icon is proposed for an L&E area, which could be considered a re-launching of the free trade zone. Although not always completely urbanized, the street layout has been already determined. This implies there is a big potential for growth differed in time to complete the net, provided a new gate strategy and enclosure is designed.

As previously mentioned for Central Coast Belize the plan proposes also to develop a very low density resort around Lamanai archeological site since it is one of the most visited attractions in the country.

## REFERENCE DENSITY

As described in section 1 in this document, the planned densities for the projects to develop is up to level 3 (30 to 40 units per acre) for Belize city since the central areas of the larger cities need concentration, density and a good mix of uses to generate diversity and maintain the economic activities and attractions for tourism.

As for the infill projects within old urban fabrics such as the old historic center with British period wooden houses around the museum and the municipality should not exceed the density or height of the neighboring buildings or blocks. For the symbolic or specific sites such the ones on the waterfront the density can be increased up to the maximum of level 3 as mentioned

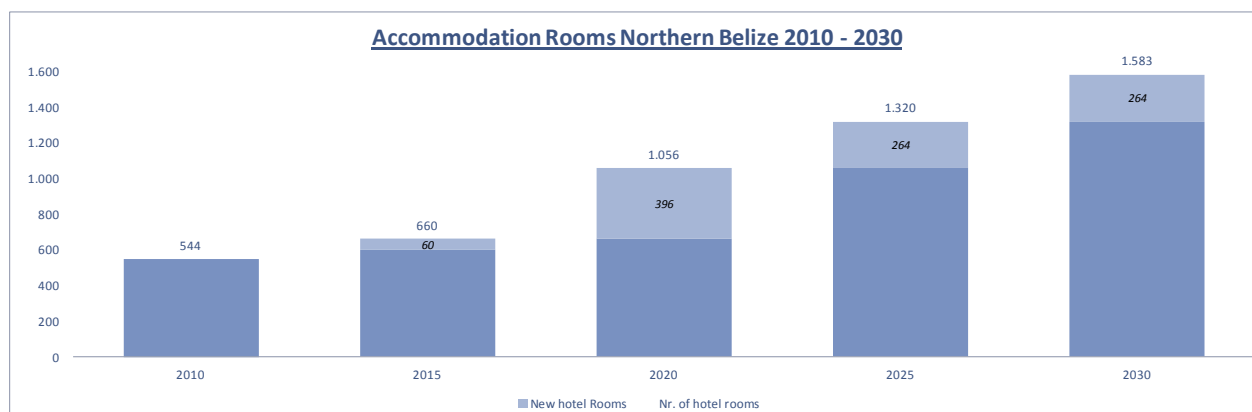
The reference density for the proposed very low density resort around Lamanai is level 1, ranging from 1 to 4 units per acre

- ▶ Level 1 (around 4 units/acre - 10 units/hectare) : Lamanai archeological site
- ▶ Level 2 (up to 20 units/acre - 50 units/ hectare): Orange Walk, Corozal, Chunox, Sarteneja
- ▶ Level 3 (up to 40 units/acre – 100 units/hectare): L&E Zone (Corozal)

## ACCOMMODATION GROWTH MODEL

- ▶ From 2012 to 2020, Northern Belize will develop 512 new hotel rooms, followed by an extra 528 from 2021 until 2030, hence reaching up to a total of 1,040 new hotel rooms between 2012 and 2030.
- ▶ Starting in 2012, Northern Belize will foster the development of accommodation facilities in rural areas, especially in participating rural communities such as the Mennonite communities. 116 rural tourism accommodation facilities will be inaugurated between 2013 and 2015.
- ▶ Between 2015 and 2019, Corozal's Leisure & Entertainment Area is suggested to be planned, developed, its investors and operators sought, etc. From 2020 to 2030, approximately 923 new rooms are scheduled to be initiated in Northern Belize, mainly for the support of leisure & entertainment tourism products.

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The total number of new rooms refers to those that would be built in the time interval of previous five years  
Source: T&L, 2011.

## TOURISM PRODUCTS

Two main tourism products were identified for Northern Belize: **Leisure and Entertainment, and Cruise Tourism**. **Nature-based Tourism and Cultural Tourism** are regarded to be secondary tourism products.

### Main tourism products

- ▶ In regards to **Cruise Tourism**, Northern Belize should offer those day visitors standard quality tourism assets and products. A further suggested cruise tourist destination, besides Lamanai, could be Cuello – an archaeological site which is currently underdeveloped. The program suggests the development of infrastructures at dedicated cruise tourism destinations, sites, attractions and activities in order to cater for large tourism crowds especially in Lamanai and Altun Ha.
- ▶ The **Leisure and Entertainment Tourism Development** focuses on structuring the destination or Northern Belize as an attractive and mid-high end shopping and entertainment point for Belizeans, regional visitors and international foreigners. If it were to be developed in the Free Trade Zone the area should improve its physical appearance, in terms of quality of products offered, and regulations in order to reduce social problems, such as criminality in terms of alcohol and drug abuse, human trafficking and prostitution. In particular, the presence and development of casinos are claimed to give Northern Belize a poor destination image

### Secondary tourism products

- ▶ Northern Belize offers great potential for **cultural tourism**, living culture and cultural heritage. Living culture would offer traditional life and expressions as a part of a tourism content development strategy for Northern Belize: e.g. Mestizo Culinary Festival, Traditional markets, Music Festivals, "A day in the life of a Maya", etc."

There are a few Maya sites, e.g. Chan Chich and La Mila, which have not been further excavated and would require rehabilitation and further development in order to be promoted. A **mid-class quality of cultural tourism** in Northern Belize is recommended.

In addition, cultural tourism in Northern Belize has the opportunity to be extended to agricultural/rural tourism involving Mennonite communities, such as Blue Creek, Spanish Lookout (Cayo District), Shipyard and Little Belize. Major industries are the sugar sector (sugar cane fields, sugar processing factories) and the rum industry amongst others.



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Cultural Tourism in Northern Belize is planned to include rural tourism at Mennonite and Mestizo communities and man-made facilities showcasing local productions such as sugar cane and rum.

- ▶ In Northern Belize, **Nature-based Tourism** should be offered to a **mid-high quality** scale and could include eco-tourism activities in the areas of Rio Bravo, Gallong Jug and the New River corridor to Northern Belize as prime tourism destinations.

Northern Belize will concentrate in its first development phase to enhance the impacts generated from cruise tourism by structuring the sites and their infrastructure for larger groups. Simultaneously, Northern Belize will start defining its cultural tourism mix, harnessing Belize's living cultures and rural tourism opportunities. Although, Northern Belize's leisure and entertainment tourism product is identified to be the most economically rentable tourism product, it is scheduled to be start its master planning and developed only by 2018. This later development stage is mainly due to the fact, that leisure and entertainment is regarded to be a product of third priority on the national tourism development agenda and that it will complement the destination cultural and nature-based tourism offer. However, first legal and juridical regulations and guidelines will be elaborated in a first stage in contemplation of assuring the concepts implementation.

		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Northern Belize	Culture																				
	Nature-based																				
	Cruise																				
	Leisure and Entertainment																				

## 4.4 Western Belize

In western Belize by 2030 we will find a San Ignacio town to be a demand driver itself hosting a state of the art welcome center, National Archeological Museum and charming village setting. The surrounding areas will have numerous nature and heritage trail systems and conceptualized adventure activities and facilities that are nurtured by demand driven from the high profile attractions such as Caracol and ATM cave systems.

On the graphic section of this Master Plan, the maps for this destination are designated with letter "C".

### Objectives

Objectives for conservation and development include:

- ▶ Increase overnight facilities will add to the economy of the region as well as balance the pressure on the coastal areas for lodging access to this region.
- ▶ Promote infill projects to help complete the empty brown fields within the urban fabric of San Ignacio
- ▶ Improve accessibility form International airport, Belize city and the rest of main tourism destinations around the country.
- ▶ As the destination, the assets and accommodation facilities are geographically very disperse, create a central tourist information area offering leisure and activities to promote the brand and offer information. This would naturally be San Ignacio.
- ▶ Promote the destination of San Ignacio to become the "Adventure Capital of Belize"

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### Proposals

Tourism development model for Western Belize (2030)	
Development	Moderate
Density	2 – 3
Overnights (2030)	989.084
Overnight growth (2010 – 2030)	2,03
Hotel rooms (2030)	2.129
New hotel rooms (2010 – 2030)	1.101



### MODEL OF DEVELOPMENT

Considering this is a national master plan that aims to provide conceptual guidelines for the development and an indicative framework it is very imprecise to establish the exact location for the new developments in a destination like San Ignacio where the accommodation facilities and attractions for tourists are dispersed around San Ignacio but in a vast area.

Taking that into consideration the proposals for models of development consider to define moderate growth both for Benque Viejo and San Ignacio. Especially in the case of San Ignacio the growth in extension should be understood as something that happens punctually around its vicinity but without necessarily implying that there is an urban continuum that leads to a compact city.

As for the attractors south from San Ignacio, Rio Frio caves, Pine Ridge and the forest area the NSTMP plans a low density new resort / town on the area known as Douglas Da Silva. The site had been previously disturbed because there used to be an economic activity. Therefore there is no need for forest clearance. There are already some constructions and an old airstrip.

The plan proposes to increase the visits and hotel rooms in Cayo, since it needs more critical mass to achieve and maintain quality standards and to support tourism related business development including shops and restaurants. As it is the focus of one of the two main landscape experiences of the country (mountains, rainforest) as opposed to the coastal destination including the reef, cayes, they need to be combined. It needs to have an airstrip within the city or in its vicinity to reduce access times and to be able to offer packages combining for example Ambergris and Placencia with San Ignacio. Time access from Belmopan airport is over 40min and is not feasible from Belize City.

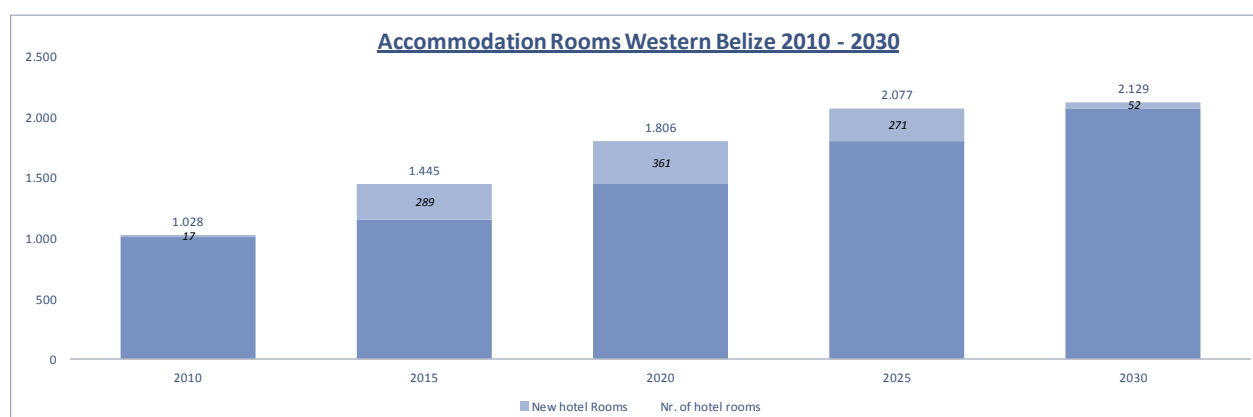
## REFERENCE DENSITY

- ▶ Level 1 (around 4 units/acre - 10 units/hectare) : New eco-lodges around Cayo
- ▶ Level 2 (up to 20 units/acre - 50 units/hectare): Benque Viejo, Douglas da Silva site
- ▶ Level 3 (up to 40 units/acre – 100 units/hectare): San Ignacio

## ACCOMMODATION GROWTH MODEL

From 2012 to 2020, Western Belize will develop 778 new hotel rooms and 323 from 2021 until 2030, reaching a total of 1,101 new hotel rooms between 2011 and 2030. Those accommodations could be located within San Ignacio Town and along the destination's nature trails and themed routes.

Western Belize will consolidate its major accommodation developments by 2015, with the opening of 289 lodging rooms. From then onwards, only a few eco-lodges/resorts with an approximately 50 to 60 rooms on average will be included in the destination.



The total number of new rooms refers to those that would be built in the time interval of previous five years  
Source: T&L, 2011.

## TOURISM PRODUCTS

This Destination is based on **cultural** and **nature-based** products grouped around San Ignacio and Santa Elena. As the second city of the country San Ignacio aims to be the “adventure capital of Belize”.

### Main tourism products

- ▶ **Cultural Tourism** in Cayo District is recommended to be offered as a **high-mid quality scale** tourism product, based on its rich cultural heritage of Mayan cultures focusing on the destination's unique assets such as Caracol and the ATM cave.

This destination's development will include a remodeling of San Ignacio town, and the introduction of man-made facilities (such as National Museum of Anthropology, a Welcome Center and a traditional market) to diversify the local cultural tourism product and make San Ignacio itself a pole of attraction.

- ▶ **Ecotourism and Adventure Tourism** is recommended to be a **mid-high quality** product in Cayo District. During the first year of Western Belize's nature-based tourism development, the master planning for the sights will include themed natural and man-made nature-based

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concepts structured into integrated recreational ecotourism and adventure sites. An eco-tourism and adventure welcome and interpretation center is planned for San Ignacio. In addition, it will host diverse nature-based themed routes and trails, such as the National Nature Tourism Trail System and a National Caving Trail System, catering to the interests and needs of different niche segments. Unique Natural tourism assets, such as the ATM cave, caves branch system, Pine Ridge forest reserve will be commercialized under well managed sustainable development guidelines

Starting by 2012, Western Belize is strengthened to undertake its nature-based and cultural tourism projects. This high priority development is due to the fact that both the destination and the two products were identified to represent a high importance on a national basis.

		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Western Belize	Nature-based																				
	Culture																				

### 4.5 South Eastern Coast Belize

This distinctive destination will be hosting a chain of mid to low density sun & beach resorts, a chain of charming villages such as Placencia, Hopkins and Dangriga along with pristine and attractive beaches. This area will host mid-high end markets drawn by sun & beach, marine life and rainforest motivations; as well as it will become the main hub for nautical tourism development and the first to attract the pocket cruise market

On the graphic section of this Master Plan, the maps for this destination are designated with letter "D".

#### Objectives

Objectives for conservation and development include:

- ▶ Do not develop cruise ship tourism on Placencia itself, but rather limit the cruise tourist arrivals to the minimal extent in deference to the idea of developing it outside the peninsula.
- ▶ Limit the development at Placencia Lagoon to protect Placencia Peninsula and its sensitive and vulnerable eco-system primarily the extensive mangrove habitat.
- ▶ Ban any new big development projects in the area of Placencia Peninsula and encourage coastline development further north from Riversdale in the Stann Creek district.
- ▶ Develop new sustainable tourism oriented town and resorts in a compact nuclei avoiding dispersion and minimizing impacts on natural environment
- ▶ Required tourism facilities and basic infrastructure (such as wastewater treatment in Placencia) should be provided before attracting further tourists and start operating the airport
- ▶ Avoid negative social impacts on local population such as dislocating local people for tourism development losing the authenticity of the destination
- ▶ Institute clear standards and policies for conservation of the natural environment to guide the scale and impact of development

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### Proposals

Tourism development model for South Eastern Coast Belize (2030)	
Development	Infill/ low impact/ moderate
Density	1 – 2 – 3
Overnights (2030)	1.752.230
Overnight growth (2010 – 2030)	6,25
Hotel rooms (2030)	4.292
New hotel rooms (2010 – 2030)	3.000



### MODEL OF DEVELOPMENT

South Eastern Coast Belize destination includes Placencia Peninsula and a coastline that are one of the most highly sensitive natural ecosystems within Belize. At the same time there is at present an increasing pressure from the real estate sector to develop the area at fast pace working on the expectations raised by the ongoing construction of an international airport nearby.

Given the confronting interests and the fact that the potential development of the destination has not occurred yet the Master Plans has chosen to define a “sacrifice zone” where to concentrate most of the new future developments.

The idea of the proposal for the destination would allow:

- Preservation of most of the coastline and specially the Peninsula from out of scale development
- Conservation of a very fragile ecosystem that makes the place an attraction
- Focus growth around existing settlements
- Release the pressure from real estate sector in other areas of the country

In this sense the new development, north of Riversdale up to Hopkins, is the place to limit the impacts of pocket cruise tourism. However, the Lagoon should be exempt from this. No high or mid density of development in Placencia, neither in the north.

So for the new developments the icon with the highest intensity considered in this work that Belize can assume has been planned for part of the coastline close to the airport and just north from Riversdale.



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South from Dangriga and Hopkins on previously disturbed areas with existing constructions, the model envisaged is for low density new resort / town. The same model has been considered for the built up areas just south from Riversdale at the very top of the peninsula.

For the existing settlements in Placencia Peninsula, Riversdale, Seine Bight and Placencia village, the model is infill and completion of existing towns.

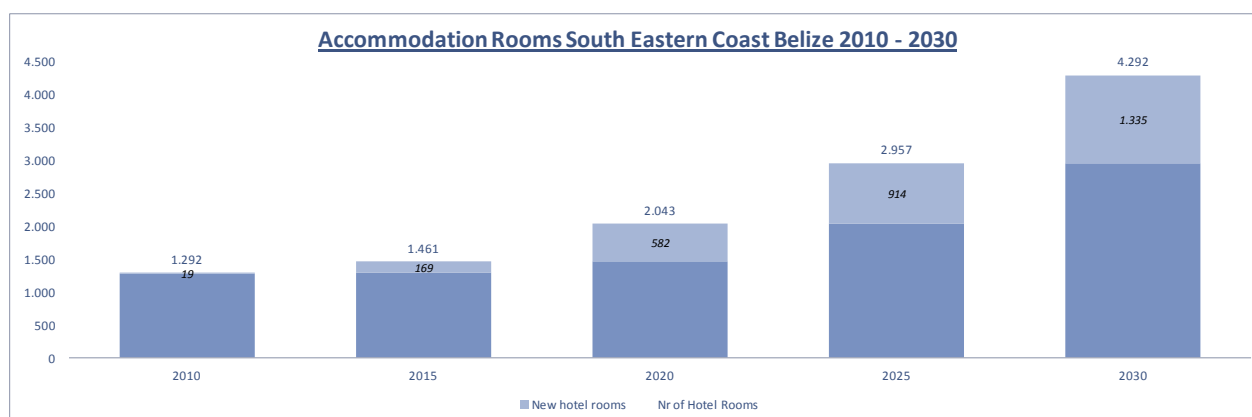
### REFERENCE DENSITY

- ▶ Level 1 (around 4 units/acre - 10 units/hectare) : All Placencia Peninsula, False Sittee point and around the point (south Hopkins), Commerce Bight area (south Dangriga)
- ▶ Level 2 (up to 20 units/acre - 50 units/ hectare): Dangriga, Hopkins, North of Maya King river up to Sapodilla lagoon
- ▶ Level 3 (up to 40 units/acre – 100 units/hectare): North from Riversdale and south from Maya King river

### ACCOMMODATION GROWTH MODEL

South Eastern Coast Belize will handle two different development scenarios, namely in Placencia Peninsula and in the “new development area” between Riverdales and Hopkins.

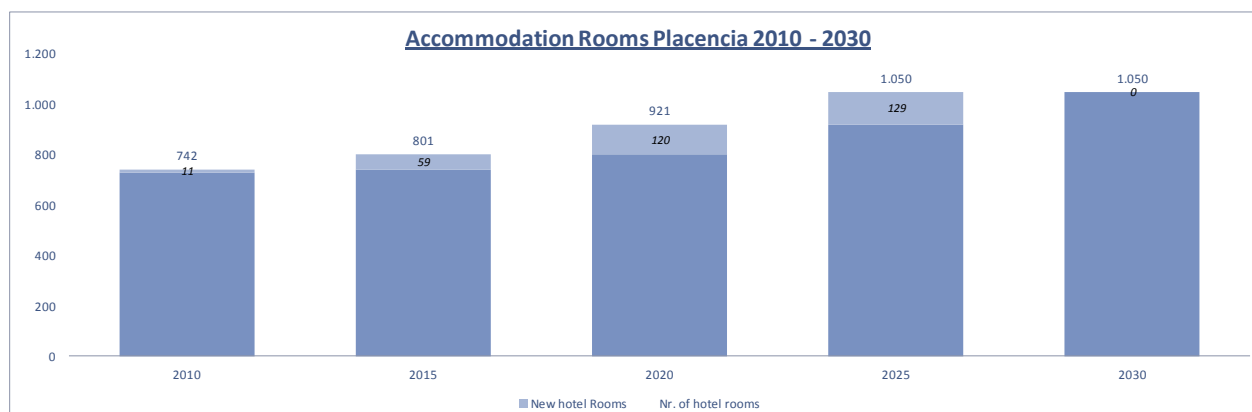
In total, South Eastern Coast Belize will develop 751 new hotel rooms from 2012 to 2020, and an additional 2,249 from 2021 until 2030, making up a total of 3,000 new hotel rooms between 2012 and 2030. Placencia Peninsula receiving only 10% of these new rooms allocation.



*The total number of new rooms refers to those that would be built in the time interval of previous five years  
Source: T&L, 2011.*

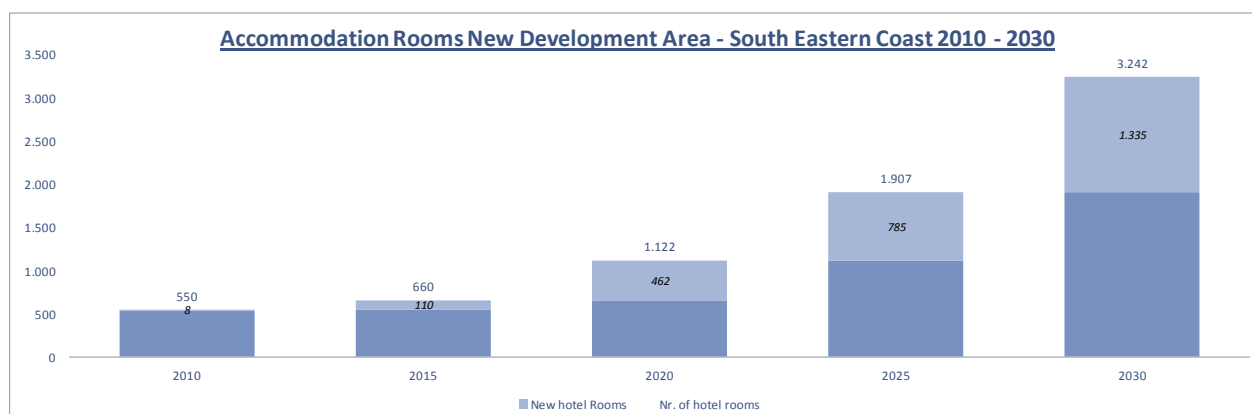
Given that vulnerabilities of Placencia Peninsula the development model is to constrain development and consolidate few new hotel rooms beyond what is already in construction today will be built. In the first phase of the NSTMP effort should be invested in developing and allocate special incentives for the restoration, embellishment and modernization of existing tourism accommodation facilities. By 2025, Placencia Peninsula will built up to 308 new room facilities and reach its stage of accommodation saturation (no further rooms should be built).

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The total number of new rooms refers to those that would be built in the time interval of previous five years  
Source: T&L, 2011.

Before the end of 2011, the **new development area** (between Riverdale and Hopkins) is suggested to start to be master planned, designed and tendered for investors/operators. In particular, the task of searching for new developers, investors and operators is expected to last far beyond 2030. However, the first development of high-end, mid-density beach resorts will be inaugurated in 2015 and will increase strongly until 2030.



The total number of new rooms refers to those that would be built in the time interval of previous five years  
Source: T&L, 2011

## TOURISM PRODUCTS

There are five different tourism products suggested for South Eastern Coast Belize, of which Sun and Beach Tourism and Nautical Tourism will be the main drivers to the destination (hence the main tourism products) and Culture Tourism, Ecotourism and Adventure Tourism, and Cruise Tourism which will be the destination's secondary tourism products.

### Main tourism products

- ▶ **Sun and Beach Tourism** should be offered as a **high quality** product and would require environmental education and awareness programs for local civil society in order to be able to maintain this product sustainably. However, in order to accommodate the product with a medium-high quality, the existing products should require further improvements and development. Pristine beaches development concept will be introduced to enhance the Sun & Beach tourism that is already experienced in the Placencia Peninsula, as it is the most dominant tourism product of the peninsula and a renowned destination in Belize for this kind of tourism product.

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The Sun & Beach Tourism product development will be launched by 2012 with its first integrated destination development master planning in South Eastern Coast Belize (Riversdale to Dangriga) intended to convert it into an exciting destination complementing the sun & beach tourism offer with water-based & rainforest activities and living culture experiences. The South Eastern Coast Belize development is expected to last beyond 2030.

The main asset of the sun & beach tourism product – the beaches – will be structured into natural relaxation zones offering water-based activities. In addition the development provides a strong emphasis on the establishment, conservation and preservation of the beaches' pristine quality standards and safety regulations for which they will be internationally promoted and known for. Furthermore, the program suggests the development of integrated waterfront experiences in main tourism hubs.

- ▶ **Nautical Tourism** should be offered as a **high quality** product that should consider the protection of the sensitive coral reef area. The Nautical Tourism Development Program will develop the tourism product starting with its introduction in South Eastern Coast Belize. The nautical tourism concept will initiate its development in Belize by 2012 in Placencia and in the area of the new development by master planning the marinas as starting and arrival point of a Belize ocean yachting and sailing experience.

### **Secondary tourism products**

- ▶ **Pocket Cruise tourism** is the only acceptable form of cruise tourism in South Eastern Coast Belize. Pocket Cruises cater to a maximum of 300 passengers and is generally a niche and high quality market. In order to avoid further environmental degradation and exclusion of local tour operators it must be managed properly, and sites must include the usage of a strong visitor management plan and its mandatory enforcement. The program suggests the development of pocket cruise tourism product in the area of the new development. Furthermore, the program develops the infrastructures at dedicated cruise tourism destinations, sites, attractions and activities in order to cater for large tourism crowds.

Conventional Cruise Tourism is not suitable for the Placencia Peninsula given the area's sensitiveness to the infrastructure developments required for accommodating conventional Cruise Tourism.

- ▶ **Culture Tourism** is recommended to be focused on the living Mayan and Garifuna cultural expressions, traditional life and enchanting villages. Local communities should benefit from the economic development of tourism and offering should be structured to meet **mid-high quality** standards.
- ▶ **Ecotourism and Adventure Tourism** should meet **mid-high quality** standards and attract cultural and environmentally friendly tourists. South Eastern Coast Belize will be the third destination to strengthen its nature-based tourism product. This mostly includes development of activity based man-made facilities and the development of tourism projects at natural areas (i.e. Cockscomb Basin Wildlife Sanctuary and linkage to coral reef).

South Eastern Coast Belize will start with its tourism products that have already been launched and that require specific guidelines and regulations in order to undertake a sustainable path of sun & beach, cruise and nautical tourism development in the destination. However, although cruise tourism is not a priority for the destination, it is regarded to be a challenging issue which needs to be addressed by developing safeguards mechanisms in order to prevent the destination's degradation.

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		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
South Eastern Coast	Culture																				
	Sun and Beach																				
	Nature-based																				
	Nautical																				
	Cruise																				

### 4.6 Southern Belize

Southern Belize destination is anchored by Punta Gorda, and enhanced by the attraction of undeveloped, extensive, mountainous jungle to the west. By 2030 this area will be known to be highly attractive to hard adventure travelers and eco- travelers for its unspoiled nature allure, conceptualized adventure travel sports activities and facilities and community tourism attractions. In a second order it will be a sun & beach and nautical tourism spot for those attracted to a more secluded area.

On the graphic section of this Master Plan, the maps for this destination are designated with letter “E”.

#### Objectives

Objectives for conservation and development include:

- ▶ Promote Nautical Tourism in Punta Gorda and the coastline
- ▶ Improvement of International pier (BMA)
- ▶ Slightly increase tourism accommodation using empty land on Punta Gorda central city area
- ▶ Enhance the access to the natural areas to the west and north, planning a limited development based on the conservation of the underlying resource.
- ▶ In the towns, organize and improve public spaces to improve urban functions, and to enhance tourism facilities
- ▶ Create new tourism attractions around the agro tourism and rural tourism using the cacao plantations

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### Proposals



The total number of new rooms refers to those that would be built in the time interval of previous five years  
Source: T&L, 2011.

### MODEL OF DEVELOPMENT

For the existing settlements the bulk of the new development considered in the Master Plan (new hotel rooms included on the objectives chapter) is to be placed in Punta Gorda. The model of development planned is therefore moderate growth.

Being one of the main proposals to develop nautical tourism, an infill and completion strategy has been defined for Barranco.

Considering the new developments, on one side, a new resort/town (low density) is planned for Punta Negra and, on the other side a very low density resort hotel and a visitor center are planned on the crossroads of southern highway and the road to San Antonio and Santa Cruz.

As a general frame the proposals related to the Natural Protected Areas could include, in limited areas, the possibility to build high quality lodging because general land use areas generate revenues that can contribute with fees to maintenance

### REFERENCE DENSITY

- ▶ Level 1 (around 4 units/acre - 10 units/hectare) : Barranco and Punta Negra
- ▶ Level 2 (up to 20 units/acre - 50 units/ hectare): crossroad point between Southern Highway and road to Santa Cruz
- ▶ Level 3 (up to 40 units/acre – 100 units/hectare): Punta Gorda

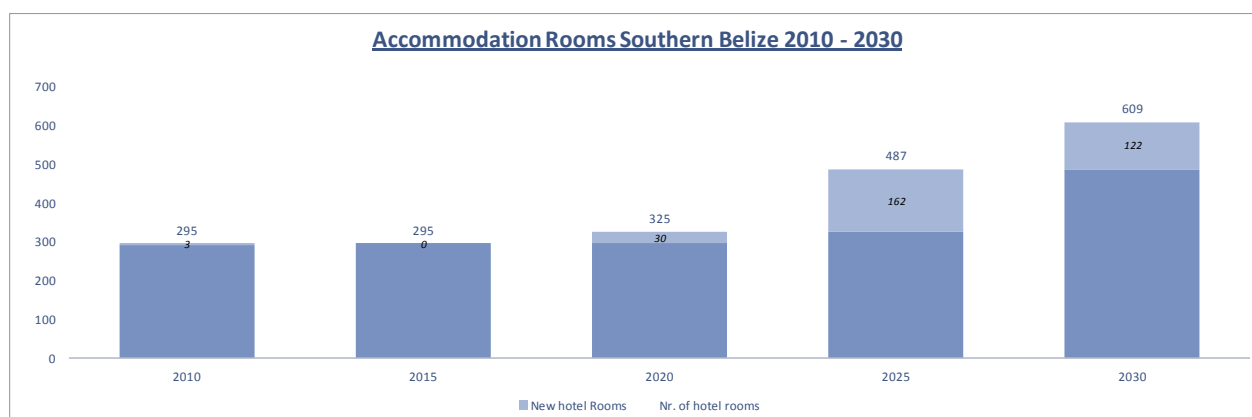


## ACCOMMODATION GROWTH MODEL

From 2015 to 2020, Southern Belize will develop 30 new hotel rooms, as well as an additional 284 from 2021 until 2030, hence adding up to a total of 313 new hotel rooms hence doubling the number of hotel rooms available today by 2030. Additionally, this means that only very few hotels are need to be developed before 2020. Any tourism accommodation development before 2015 should be prohibited, as they would endanger the local occupancy rate and would jeopardize the hotel and tourism accommodation sector.

In the period comprised between 2020 until 2030, the destination could launch 20 additional hotel room facilities on average per year. Some of the said facilities are recommended to be devoted to special nature-based and sun & beach-tourism accommodation.

Meanwhile, the existing facilities are recommended to be provided with incentives and subsidies so as to encourage renovation, modernization and raising the facilities' attractiveness in order to increase their capacities, quality and competitiveness.



The total number of new rooms refers to those that would be built in the time interval of previous five years  
Source: T&L, 2011

## TOURISM PRODUCTS

It is suggested that Southern Belize should host **four tourism products**, namely **Cultural Tourism**, **Ecotourism** and **Adventure Tourism** which will be the main tourism products attracting most tourists to the destination and **Sun and Beach Tourism** and **Nautical Tourism** which will be the secondary tourism products.

### Main tourism products

- ▶ **Cultural Tourism** should be given major consideration based on the diversity of the local cultures and hence should be integrated into the Tourism Master Plan as a main product for Southern Belize. This proposal is due to various festivals being organized throughout the year in Southern Belize by different communities such as Garifuna and Maya. Cultural Tourism in Southern Belize should be offered to a **medium-low quality**.

Southern Belize's cultural tourism development will require the Integral Development of Mayan sites Concept implementation, cultural trails/themed routes, and diversify its tourism offer by enhancing its living culture and agro-tourism portfolio (promotion of cultural festivals, a home-stay network, traditional markets, agro-tourism activities such as cacao and coffee plantations).

- ▶ **Ecotourism and Adventure Tourism** is suggested to offer **high-mid quality** tourism facilities and services in Southern Belize, and could include activities eco-tourism activities

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such as bird watching and river tours and adventure activities such as kayaking, diving, snorkeling, etc. Nature-based tourism in Southern Belize will design and develop the local routes and trails through the nature reserves, and develop man-made facilities hosting adventure experiences in Belize's southern areas.

### Secondary tourism products

- ▶ **Sun and Beach Tourism** is recommended to be offered to meet **mid quality** standards. The destination's sun and beach tourism will require an integral development including low density beach resorts, product specific activities and facilities. Furthermore, the program suggests the development of integrated waterfront experiences in the Punta Gorda area.
- ▶ **Nautical Tourism** is selected for inclusion at **mid-high quality** standards. The "Port of Honduras" location is especially recommended for the development of a marina; and further nautical tourism facilities should be developed with a mid-density development. Additionally, a port facility next to Punta Gorda should be developed.

Southern Belize will start both its soft development for nature-based and cultural tourism development by 2013 which will mostly include research, policy development, capacity building, licensing of tourism suppliers. By 2015, the hard development will start by conceptualizing, structuring, developing and promoting its product mix. Nautical tourism will be developed prior to sun and beach tourism in order to complete the national system of marina and nautical tourism.

		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Southern Belize	Culture																				
	Nature-based																				
	Sun and Beach																				
	Nautical																				

## 4.7 Northern Islands

The Northern Islands destination is the core of natural and nautical tourism at its most diverse. At the same time, settlement is anchored by one of the highest character towns in the Caribbean – San Pedro. Here, in particular, the rich natural and cultural environment of San Pedro, is particularly sensitive and vulnerable to development. As the main islands it includes Ambergris Caye, Caye Caulker, Caye Chapel and all the other small islands and cays within the range.

By 2030 San Pedro will be regarded as a charming and attractive destination including a vibrant town with walk-able and attractive waterfront experience where beaches can be enjoyed and the water scenery is unobstructed. Caye Caulker continues to offer a low-key charm along with attractive beaches and a cultural offering. Both destinations cater to a mainly nature based niche product and nautical and sun & beach on a second order.

On the graphic section of this Master Plan, the maps for this destination are designated with letter "F".

### Objectives

Objectives for conservation and development include:

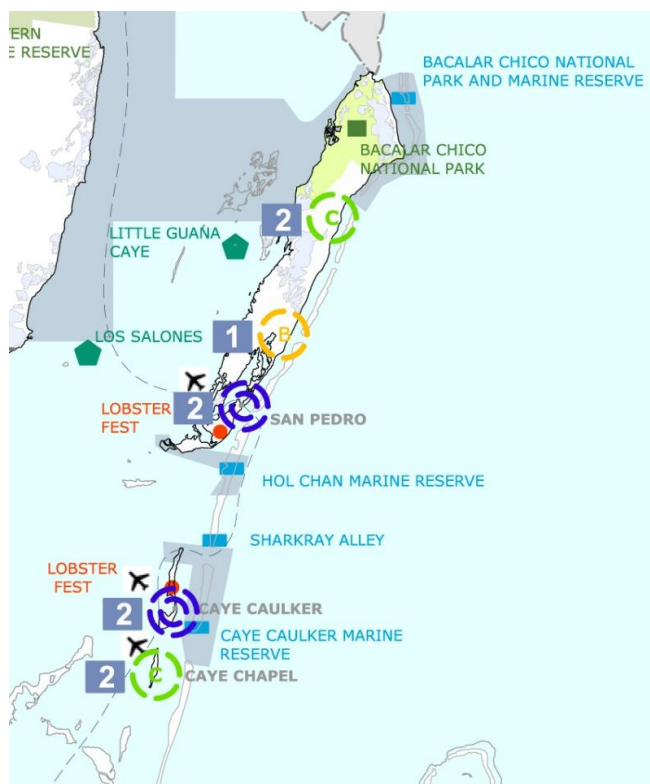
- ▶ Development must be limited by impacts to the natural environment. Conservation of this is central to the long term success of this Destination

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- ▶ Ban accommodation facility's development in the southern and northern most ends of the island as these areas should be reserved for residential or preserved areas and only receive day-visits from tourism.
- ▶ Do not allow density development above 40 units per acre on the Northern Islands. Very low impact, but very high quality development in existing natural areas
- ▶ Protect from development the wetlands and mangrove areas, as they are of utmost importance to keep the eco-system.
- ▶ Protect from development Bacalar Chico Marine Reserve. The sole development which should be authorized should be the required facilities such as a visitor center, a museum and restaurant facilities.

### Proposals

Tourism development model for Northern Islands (2030)	
Development	Infill/ low impact
Density	1 – 2
Overnights (2030)	1.209.224
Overnight growth (2010 – 2030)	1,82
Hotel rooms (2030)	2.726
New hotel rooms (2010 – 2030)	338



### MODEL OF DEVELOPMENT

In terms of development the conceptual principle for the northern islands destination is to constrain the development and consolidate and improve what it has already been built.

Keeping in mind the mentioned idea, both the existing settlements in Caye Caulker and Ambergris Caye are defined as infill and completion of existing town / village. The case of San Pedro is further developed in the following sections of this document.

For the proposed 338 new hotel rooms two different strategies are put in place. On the north tip of Ambergris Caye three very low density resort hotels are planned outside from Bacalar Chico National Park. In order to minimize the impacts on the environment the areas chosen have been previously disturbed.

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On second place the plan proposes some small low density new developments off the main road leading north and after the bridge north from San Pedro. The idea is to complete some of the areas that have already been recently urbanized. As commented on section 4 for Ambergris Caye this study proposes to develop studies to convert into hotel units the empty apartments or unfinished compounds built around the main road north from San Pedro.

### REFERENCE DENSITY

- ▶ Level 1 (around 4 units/acre - 10 units/hectare) : New developments north of San Pedro
- ▶ Level 2 (up to 20 units/acre - 50 units/ hectare): San Pedro, Caye Caulker, 3 designated areas north Ambergris Caye

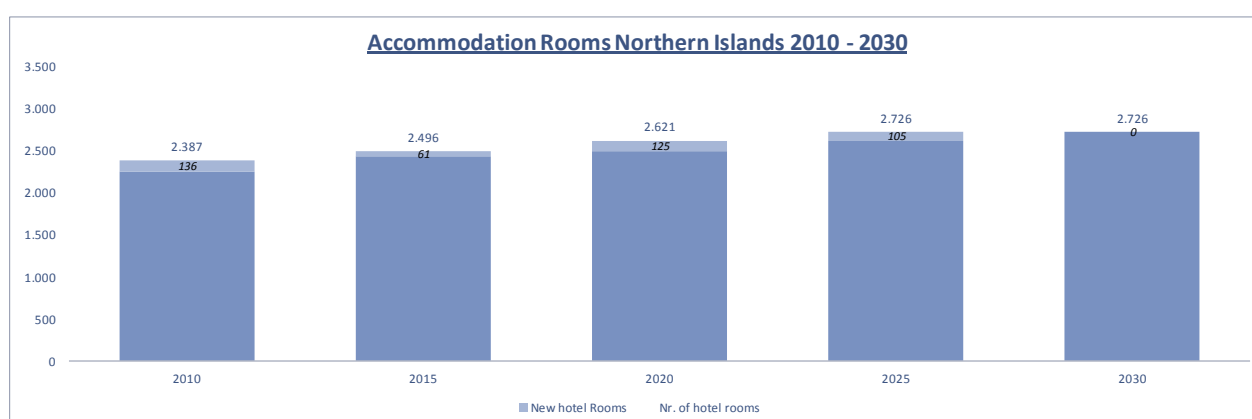
### ACCOMMODATION GROWTH MODEL

From 2012 to 2020, the Northern Islands will see the development of 233 new hotel rooms and a further 105 from 2021 until 2030, adding up to a total of 338 new hotel rooms by 2030.

In order to maintain the occupancy rate on a positive growth track, no additional hotels should be introduced until 2013. These few years are recommended to be devoted to the development and distribution of special incentives for the restoration, embellishment and modernization of the existing tourism accommodation facilities.

In addition, a series of operational strategies are recommended to be identified in order to convert condominiums into hotel facilities or condo-hotels. This strategy was identified as especially Ambergris Caye's tourism industry experiences distress with condominium being empty for long periods at times and tourists who use them do not consume additional tourism services.

The first new hotels and resorts in the Northern Islands are recommended to open in 2014. The main developments are to open in 2015 and 2020 given that, mainly serving as a complement to the sun & beach resorts of the destination and northern area low-density luxury developments. From 2025 onwards, only few hotels/hotel rooms with low density will be introduced.



The total number of new rooms refers to those that would be built in the time interval of previous five years  
Source: T&L, 2011.

### TOURISM PRODUCTS

It is suggested that Northern Islands should host **four tourism products**, namely **Cultural Tourism, Nautical Tourism, Ecotourism and Adventure Tourism**, and **Sun and Beach Tourism**.

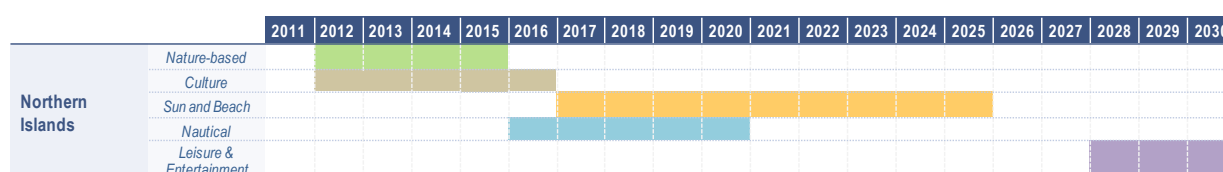
### Main tourism products

- ▶ **Nautical Tourism** should be offered as a **high-mid quality tourism product** with centralized pier facilities and services. In order to control nautical tourism, there should be a regulation setting speed limits for high-speed boats.
- ▶ **Ecotourism and Adventure Tourism** in Northern Islands which consists of the enhanced development of a living reef welcome/interpretation center and further structuring of the offering conducted within the Bacalar Chico National Park.
- ▶ **Sun and Beach Tourism** is currently not well developed in the destination, and should meet the standards of a **high-mid quality product**. The development will focus on remodeling the existing condominiums into mid/high end luxury sun & beach resorts. The main asset of the sun & beach tourism product – the beaches – will be structured into natural relaxation zones offering water-based activities. In addition the development provides a strong emphasis on the establishment, conservation and preservation of the beaches' pristine quality standards and safety regulations for which they will be internationally promoted and known for. Furthermore, the program suggests the development of integrated waterfront experiences in main tourism hubs.

### Secondary tourism products

- ▶ **Cultural Tourism** is recommended to be offered to a **high-mid quality** and showcase the Belizean culture of the island. Cultural tourism awareness program should be introduced to civil society as tourism already shows traces of influencing the local cultures, especially amongst youth. Northern Islands is developing its cultural tourism portfolio (Integral Development of Mayan sites Concept development, San Pedro embellishment and façade renovation; improvement of existing hotels and resorts; creation of new cultural festivals itineraries, etc.).
- ▶ A smaller version of the **Leisure & Entertainment Tourism** concept is suggested to be presented in San Pedro, in the form of an attractive and concentrated area for mid end shopping, edutainment and entertainment that caters to market segment that visits San Pedro as well as local demand

Northern Islands starts planning and developing its nautical tourism product before its sun & beach tourism product. This phasing is based on the identification, that Northern Islands is identified as an active ecotourism and nature-based tourism destination complemented by sun & beach tourism's offer.



## 4.8 Belize Reef

The Offshore Belize destination, and the Barrier Reef on which it is anchored, is one of the most distinctive and world class attractions – *the other two being the Mayan antiquities and mountainous jungles.*



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This unique chain reef islands by 2030 will be renowned internationally for its world heritage status and will be regarded by visitors as pristine and preserved destination. Caters mainly to day visitors and niche markets in a second order hosts exclusive sun & beach low density resorts and nautical tourism facilities.

On the graphic section of this Master Plan, the maps for this destination are designated with letter “G”.

### Objectives

As such, conservation is key, and development completely subservient in quality and extent. The main objective is to limit growth, only allowing it for necessary improvements to existing homes, resorts, lodges and other facilities. Preservation of the Barrier Reef and all other marine habitats should be the primary concern when assessing any alterations to these.

### Proposals

Tourism development model for Belize Reef (2030)	
Development	Low impact
Density	1
Overnights (2030)	147.783
Overnight growth (2010 – 2030)	2,15
Hotel rooms (2030)	389
New hotel rooms (2010 – 2030)	37



### MODEL OF DEVELOPMENT

Only allow improvements and small enlargements for existing tourism facilities to complete maximum growth allocated of 37 new hotel room.

The proposed strategy for conservation is to establish and promote a day visitation formula.

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### REFERENCE DENSITY

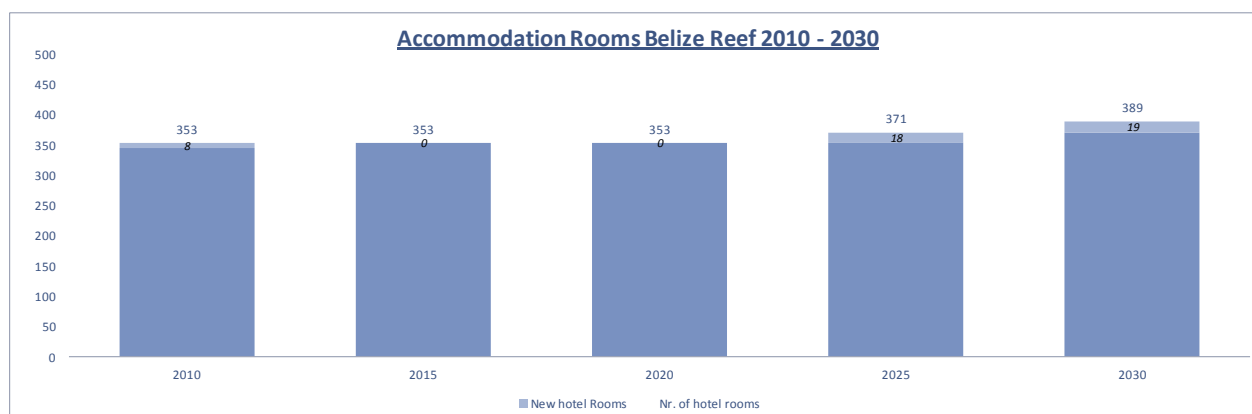
There are not indications on the graphic plans since there is no development proposed for new resorts or hotels. As it has been said the idea is to operate by extending the existing facilities in the same manner. Therefore the reference densities anywhere on the destination are level 0 or 1 only.

- ▶ Level 0: all the destination, except what is considered as level 1
- ▶ Level 1 (around 4 units/acre - 10 units/hectare): extension of existing resorts

### ACCOMMODATION GROWTH MODEL

From 2012 to 2020, Belize Reef should not develop any additional hotel accommodation rooms. Existing facilities should be encouraged to restructure their offerings for day visitor activities. New development should not be promoted, as they would eventually become detrimental to the occupancy rates and the existing accommodation businesses.

From 2025 until 2030, Belize Reef could develop 37 new accommodation rooms in low density facilities. New investments are recommended to be made in facilities devoted to nautical, sun & beach and nature-based activities.



The total number of new rooms refers to those that would be built in the time interval of previous five years  
Source: T&L, 2011.

### TOURISM PRODUCTS

There are three main tourism products in Belize Reef, namely nature-based tourism and nautical tourism which will be the main motivation for tourists to visit the destination and sun & beach as a secondary tourism motivation.

#### Main tourism products

- ▶ **Nature-based Tourism:** Belize Reef's nature-based tourism product mostly includes water-based activities and tourism services structured around them to cater to the needs of day visitors.
- ▶ **Nautical Tourism:** Offering anchorage points, small marinas and docking stations.

#### Secondary tourism products

- ▶ **Sun & Beach Tourism:** Belize Reef should develop a few resorts and sun & beach tourism assets/activities.

All three tourism products should be offered to a **high quality** standard.

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Belize Reef was identified to remain as long as possible a natural and generally untouched destination, which will mostly develop water-based day visitor attractions and enhance its nautical tourism product. Only at a later stage, Belize Reef will start developing its low density sun & beach tourism product.

		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Belize Reef	Nature-based																				
	Sun and Beach																				
	Nautical																				

## 5 ANNEX 2: LAND USE STRATEGIES

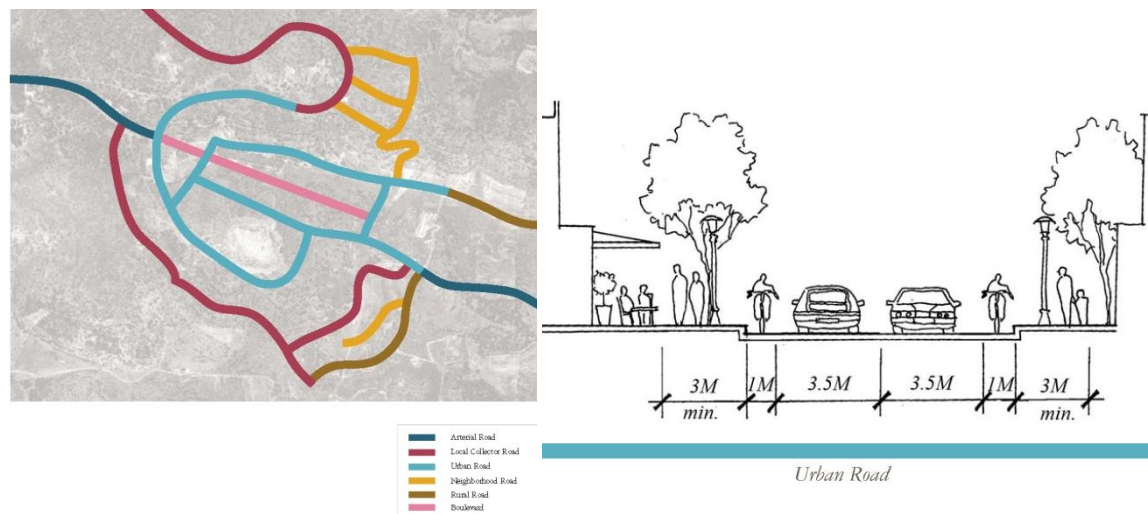
### 5.1 OTHER LAND USE STRATEGIES

#### 5.1.1 Next Steps

As mentioned above, this Land Use Framework will clearly describe the intended development of each of the area plans in this study. However, it can also serve as the basis of a number of land use regimes applied under different jurisdictions and agencies. These include:

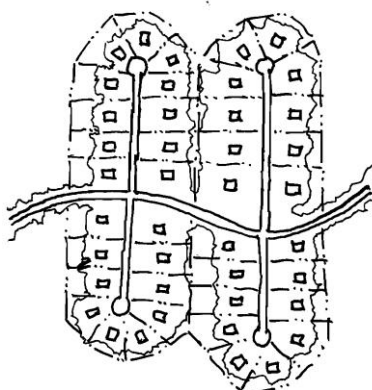
- ▶ **Zoning or Municipal Land Use.** Instead of Euclidean Zoning currently applied by many jurisdictions – particularly towns and cities – this Framework is a hybrid. It includes both common zoning criteria such as height and setbacks, etc., but it also is visually oriented, or form based. The intent is that it is more important to the authenticity of a town to have developments that are compatible with historic architecture and urban form, than what happens inside each building. For jurisdictions that want to convert to a form-based code, the full system of regulating plans and descriptions of architectural elements can be added. (The Congress for New Urbanism has a model code that will illustrate the composition of this approach). Below is an example of a regulating plan and the street typologies that are attached to each street. This would be the type of form-based plan that would control the development of a village.

Regulating Plan for Form-Based Ordinance Regulating Village Street Section

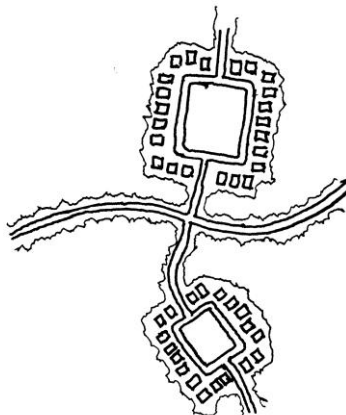


- ▶ **Land Use Planning.** As illustrated in this planning study.
- ▶ **Special Purpose Plans.** These are done for high value resources and landscapes such as Mayan antiquities and their surroundings.
- ▶ **Special Purpose Ordinances.** An example of these would be an overlay on all land use planning regimes for clustering. The conservation benefits and development cost benefits are clear as shown in the following diagram.

Conventional Subdivision



Clustered Subdivision



- ▶ **Conservation Plans.** This Framework has the added value of describing conservation typologies that allow low intensity development that can be used to conserve the surrounding resource. This may be done by distributions of proceeds or by using high quality development to ensure that the surrounding area is not degraded.
- ▶ **Design Guidelines.** This form-based approach provides illustrations and principles that can be the basis for design guidelines applied to the Tourism industry.
- ▶ **Design Standards.** In addition to quantitative criteria, additional standards for development and operation can be added to provide a guide for developers and standards for the industry.

Certainly, other planning regimes can be informed by this Framework, and the next action in development and conservation planning would be to analyze these and go through the legal and administrative processes for their integration and revision.

### 5.1.2 Conservation strategies

There are a range of strategies that may be applied that range from high cost acquisition of environmentally sensitive and vulnerable land, to lower cost, consistent application of effective conservation standards.

1. Create a conservation ethic in Belize – consensus among stakeholders that effective conservation is necessary to this industry and the long term health of the economy.
2. Identify and map the natural and cultural resources, and their surroundings that are attractions to visitors to Belize.
3. Create an over-arching conservation vision and policy to protect these resources.
4. Give conservation an economic base – a strategy for conservation and stewardship on private and public lands that can be funded by limited development.
5. Prevent urban sprawl and institute methods that will cluster development in higher intensity areas.

### Actions

Alternatives for actions on this front include:

1. Create a central data base that identifies by criteria, description and mapping, in quantitative and qualitative terms the valuable natural and cultural resources. This needs to be readily available to all agencies and stakeholders. It also needs to be maintained for the long term.



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2. Commission a study of the long term effects of existing and anticipated development practices on the resources in question. This can address alternative scenarios for future development and clearly demonstrate to all stakeholders the effects of conservation efforts or the lack thereof.
3. Create consensus through advertising and public relations of the importance of natural and cultural resources to the future of Belize. Use genuine sustainability as an attraction for high value tourism.
4. Set near and long term targets for conservation of identified resources. In as much as it will take time and perseverance to conserve the resources in question, each planning period needs objective goals for conservation.
5. Maximize existing infrastructure where capacity can be used to accommodate new development. This rather than permit new infrastructure improvements.
6. Maximize the value of land in government ownership by using it for demonstration projects and early sources of income to fund conservation. These projects may be ecolodges, conservation of specific development areas
7. Prepare a land use framework that specifies appropriate types of development and matches them to suitable land areas.
8. Establish development control for each initiative or issue. Formulate and implement the appropriate environmental design and development controls that consider issues such as water quality of the marine environment, tree preservation, development on steep land, disturbed areas, clustering development in existing urban areas and water conservation.
9. Commission a study of valuable visual resources (viewed areas for tourism). This will include a visual preference survey, mapping of resources and scenic byway plans and regulations.
10. Establish Fast Track projects that will enhance project momentum. Create a priority list of 5 projects and take them to the investor market.

In the process of this study, we reviewed a number of studies the goal of which is conservation of resources. They are all well-intentioned, but in many cases they are inflammatory, not based on science, and do not affect a rational approach to conservation. Not only does conservation need to be a priority for tourism development, the approach to conservation needs to be unified, rely on proper science and a rational approach to building consensus, regulations and a long term commitment.

- ▶ Sustainability and energy efficiency regulations
- ▶ Regulate for each destination the use of materials (compulsory, compatible, non-compatible) and some basic aesthetics conditions

### 5.1.3 Land use strategies

From a tourism development perspective, there are good and bad ways to attract quality development and developers through land use planning. The good way is through:

- ▶ Clear development standards that are consistently applied
- ▶ Clear and transparent entitlement processes that provide predictability to the permitting and development process
- ▶ Unified administration of the above.
- ▶ Public participation guided by good leadership working under well-coordinated planning regimes.

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Bad ways to attract quality development – or to prevent quality developers from taking an interest in a project – are inconsistent standards applied by separate agencies to different development criteria. Another is to make entitlements subject to the political process.

The analysis of the environmental and land use planning issues and planning regimes presented elsewhere in this body of work, along with the long list of special purpose plans illustrate that there is no lack of interest in planning, but that there are disparate agencies and interests at work. The major entitlements may come from all of the following:

- ▶ Department of the Environment
- ▶ Lands and Survey Department
- ▶ Coastal Zone Management Authority
- ▶ Municipal government.

Current and recent developments in environmentally sensitive areas or the sprawling development patterns are not indicative of their success in creating unified standards or processes. Of particular notice is the often ad hoc cutting of mangroves – the subject of several recent controversies. However, storm water management, wetland modification and development on steep slopes are several other key environmental issues in question.

As a basis for a unified approach to land use planning and the entitlement process, a Land Use Framework is presented in an annex to this report. This Framework includes the development models described above, but adds significant detail to the allowable limits to development as well as the character and scale of development that is appropriate to Belize. This Framework can be adapted or enhanced to fit into regulatory regimes at every level of government. Several of the elements of the vision are central to the need for central and unified permissions for tourism development. These include:

- ▶ The creation of high quality development within the tourism sector
- ▶ The attraction value of the natural environment
- ▶ The attraction value of the cultural environment to high quality tourism.

Developers generally make long-term investments that may span a 30 year development period and long-term investment. To make these commitments, their fundamental need is for predictability within the environment that affects their development.

For example, to develop a resort hotel in a natural area, it is not enough that the developer and operator are granted permission to build their hotel, but also that for the entire period of design, construction and operation that the areas around them do not change. It affects sustainability in two ways – occupancy of the hotel and the health of the natural environment.

Therefore, with respect to land use planning, strategies need to include:

1. Establish clear and evenly applied standards for development that consider environmental, social, cultural and economic well-being of Belize.
2. Establish a coordinated land use planning process to gain entitlements for tourism development.
3. Create a long-term approach to land use planning that will conserve the quality of the fundamental resources as well as encourage high quality tourism in Belize.

With respect to where to go from here, there are a number of fronts that can be addressed by the Land Use Planning process.

1. Review existing land use planning regimes for consistency and transparency. The following table presents a taxonomy of planning regimes that are customarily addressed in an advanced and predictable development environment.

**Table: Taxonomy of Planning Regimes**

Type of plan	Issues addressed	Responsible Agency
Country wide land use policies	Spatial, economic and social welfare and growth	Central government
Regional land use plan	Spatial distribution of development and conservation	Central government and regional authorities
Comprehensive plan	Integration of regional and municipal plans to appropriately allocate natural, economic and social resources. Often under the auspices of a Growth Management agency.	Central government
Municipal land use plan	Spatial distribution of acceptable types of development	Municipal government
Special Purpose Plans or Overlay plans	Plans that address areas or issues of particular concern or resources of particular value	Varies with importance of resource.
Municipal zoning or form based code	Permitted types of development and areas or forms in which they may occur.	Municipal planning authority
Land Development Regulations	Specifications of civil improvements	Planning, engineering and environmental agencies
Environmental codes	Standards for water and air quality, as well as sensitive ecosystems. These also affect water and wastewater networks as well as solid waste disposal and storm water management works.	Environmental, Engineering agencies
Building code	Building specifications and standards	Building department
Design guidelines	Discretionary standards for aesthetics, materials	Design review committee
Code enforcement	Inspections of construction and existing conditions	Code enforcement division

This taxonomy can be further delineated for the particular circumstances in Belize, but is presented in this way to suggest additional areas of consideration. It may be unrealistic to expect an overhaul of the entire system. However, at least the targeted tourism development areas and areas including and surrounding high quality antiquities should receive long-term and effectively integrated land use plans that conserve the fundamental resources and have the predictability to attract long-term investment.

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2. Create a centralized data base of mapped and demographic data that can be used to base land use plans on scientific data and models that can assess the degree of change that development will affect on the environment.
3. Creation of a “lead agency” approach to entitlements that provide a developer with one point of contact. For Tourism Development, this may be the DMO.
4. For tourism development, create clear development standards and design guidelines that address the issues of quality and context. These standards, and the processes used to administrate them should be form-based, so that the authenticity of development can be conserved.
5. Create a code enforcement mechanism to be sure that standards are maintained over the long term.
6. Create a clear process for developers to fund additional staff needed to review their application and operation.
7. Address specialized issues that affect sustainability and the quality of the tourism environment such as visual quality and clustering of development.
8. Create a limited, but expanding number of targeted development projects that are pre-approved with the kind of land use assurances characterized above. These permissions need to consider the sites and the surrounding areas. For example, it is of most benefit to an eco-lodge developer, (and consequently creates the most value to Belize), for the investor to know that the surrounding land area will be permanently conserved to keep their primary amenity pristine.

The greatest argument in favor of these actions is that this is a high value, low cost approach to attracting investment. Putting land use regimes in place and ongoing processes creates a significant amount of value, while it does not begin to cost as much as a new road, airport or other capital investments in infrastructure. Permissions, predictability and consistent enforcement are generally more valuable than the sale of the land they consider.

### 5.1.4 Planning priorities

Though it is really the choice of the stakeholders as to which planning strategies are of the highest priorities with respect to land use policy, strategy and implementation, there are some low cost, high value steps that may be taken to increase the quality of projects being funded and built. These include the following:

- ▶ Promote the development of pilot projects that implement the Land Use Framework
- ▶ For one or more high value pilot projects, gain control of the land, prepare site plans and provide land use authorizations for developers and investors.
- ▶ Improvement and connection of services to the new development areas considering the contribution that the private initiative could make to assume their implementation costs
- ▶ Create a centralized data base for mapped information, including property lines, topography, aerial photography, environmental data and any mapped data from existing studies. Also, create a common format for analysis of land for projects and planning.
- ▶ Convert the Land Use Framework into a unified ordinance for project planning.

## 6 ANNEX 3: SUSTAINABILITY BEST PRACTICES RECOMMENDATIONS

Below is a proposal for the corrective measures that should be taken into account and introduced during the drafting and execution phases of the projects connected to the proposals of this master plan, with the objective of minimizing impact during the operational phase.

**Low-noise surfacing.** In order to minimize acoustic impact the use of low-noise surfacing is proposed on new roads.

**Illumination quality.** To comply with standards to improve efficiency some of the usual conditions should be considered on the different developments:

- ▶ Type of lamps:

Evening hours	Night-time hours
Preferably VSBP/VSAP	Preferably VSBP/VSAP

VSBP: sodium lamps low pressure. VSAP: sodium lamps high pressure

- ▶ Maximum Flux percentage for upper hemisphere of a light globe:

Evening hours	Night-time hours
15	15

- ▶ Maximum glare level in outdoor street lighting: 15 %.
- ▶ Maximum glare index in lighting for pedestrians (I):

Height of light (meters)	I
4.5	4,000
4.5-6	5,500
6	7,000

- ▶ Maximum intrusive illumination in vertical surfaces, expressed in lux:

Evening hours	Night-time hours
10	5

- ▶ Average maximum illumination in areas intended for vehicle and/or pedestrian traffic, expressed in lux:

	Illumination in vehicle area	Illumination in pedestrian area
Heavy traffic	35	20
Moderate traffic	25	10
Light traffic	15	6



- ▶ Maximum luminance of signs: 800 cd.m-2.
- ▶ Maximum luminance of buildings, shop fronts and windows

Evening hours	Night-time hours
80	40

- ▶ Average maximum luminance of facades and monuments, expressed in cd.m-2:

Evening hours	Night-time hours
10	5

**Public lighting.** The following corrective measures are proposed in order to reduce and minimize the light pollution caused by the artificial lights used in the public lighting of the area:

- ▶ Use of the most appropriate type of lighting according to its use: street, highway, pedestrian area or ornamental.
- ▶ Use switching systems such as high quality photoelectric cells or astronomical clocks, to ensure that the lights do not remain on at times when there is natural light.
- ▶ Use sodium vapor lamps because they consume almost half the electricity of mercury vapor, and generally produce less light pollution.
- ▶ Ensure that the exteriors of the lamp fixtures are flat, that the material used has high transmission capacity and that it is weather resistant and durable.
- ▶ Do not use globe-type lamp fixtures without a reflector on top, since they emit a lot of light above the horizontal.
- ▶ As much as possible, avoid ornamental lighting, and if it is unavoidable, use high-performance asymmetrical lamp fixtures, since they provide better lighting with less light.
- ▶ Attempt to avoid the emission of light above the line of the horizontal, especially in highway and street lighting.

**Conservation of existing vegetation.** Existing vegetation should be conserved or transplanted nearby if punctually needs to be cleared

**Native species.** The tree and plant species that are planted shall be natives. It is not recommended to plant any species which could alter the ecological balance or importance of the native vegetation. The existing alien species should be analyzed and those which could alter the location's own natural habitats such as quality of the soil or water needs should be discarded and not used for future interventions.

**Rain water should be used for watering the green areas.** Watering needs will take advantage of rain water, collected from buildings or from street guttering and then channeled through a dedicated rainwater collection network.

**Installation of automatic watering controllers for green areas.** Controllers will be installed to control the duration and frequency of watering for green areas, avoiding their use during the hours in the middle of the day, since evaporation is higher at this time.

**Biodiversity of animal life.** Species will be planted that offer food resources to animals and allow complex vegetation structures to be created, to promote the presence of wildlife. Enforcement policies need to be put in place to avoid sanding and cutting of mangroves.

**Minimization of water usage.** As a minimum, the following systems and mechanisms will be installed in the water usage systems for new buildings to minimize water consumption to set down environmental and eco-efficient criteria to be adopted in buildings:

- ▶ Taps for sanitary equipment for individual use (toilets, bidets and sinks, as well as shower units) will be designed to save water or will be equipped with water-saving mechanisms or similar devices, as well as flow-reduction mechanisms. In all cases, they will provide a maximum flow of 12 liters/minute and a minimum of 9 liters/minute at a minimum dynamic pressure in use of more than 1 bar.
- ▶ The toilet cisterns must be installed with systems for dual-flush or interruptible flush.
- ▶ In buildings used for educational, health or sports related purposes, it is compulsory to fit toilet and shower taps with either timed flush mechanisms or human presence sensors that will activate them.

**Water re-use.** The possibility and feasibility of introducing systems to reuse grey water in toilets will be considered.

**Dual sewerage network.** In compliance with regulations for the adoption of environmental and eco-efficiency criteria in buildings, buildings are required to be equipped with a sewerage system that separates rain water from waste water. This separation has to be maintained, at least as far as a control box located outside the property, or if this is not possible, at the point on the edge of the property closest to the general sewerage network. A single connection to the public network will be allowed if this network does not have a system for separating the two types of water.

**Energy efficiency and saving.** In new buildings, the following measures will be carried out as a minimum to promote energy saving and improve energy efficiency:

- a) The solid parts of different vertical exterior walls of buildings, whether protruding, exposed or protected, including thermal bridges built into these walls, such as frames for openings, exterior wall pillars, roller-blind boxes or others, will incorporate thermal insulation construction solutions that ensure an average thermal transmittance coefficient  $K_m = 0.70 \text{ W/m}^2\text{K}$ .
- b) The openings of exterior walls and roofs of habitable spaces will use double-glazing or other solutions that ensure average thermal transmittance coefficient for the entire opening equal to or less than  $3.30 \text{ W/m}^2\text{K}$ .

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- c) The openings of exterior walls and roofs facing south-east ( $\pm 90^\circ$ ) must be equipped with a protective element or treatment located on the exterior or between the two layers of glazing, so that the solar factor S for the glazed area of the opening will be equal to or less than 35%
- d) Buildings which have a demand for heated potable water equal to or greater than 50 liters/day at a reference temperature of  $60^\circ\text{C}$ , need to be equipped with a hot water production system that uses solar thermal energy for its operation with a minimum contribution in %, depending on the areas or Districts within the country.

This requirement will not be enforced:

- ▶ When the energy needs for this heated potable water are provided by other renewable sources, cogeneration processes or residual energy sources originating in the installation of systems for recovery of heat independent to the building's own heat generation.
- ▶ When the building does not receive sufficient sunlight due to external barriers.
- ▶ In newly constructed buildings when there are unalterable limitations resulting from the applicable planning regulations, that make it obviously impossible to provide the capture area necessary.
- ▶ In all these cases it will be necessary to justify both the use of another source of energy different from those mentioned in point a), and the impossibility of execution as mentioned in the points above.
- e) In buildings where it is desired to use electrical resistors to produce heated potable water through the Joule effect, the minimum solar production in any area must be 70%.

This point will not be applied in areas where there is no piped gas service or where the electricity is obtained through photovoltaic solar energy or other renewable energy sources.

- f) In any building where the installation of dishwashing equipment is planned, there needs to be both a hot water and a cold water tank in the space planned.

**Energy efficiency and energy saving in communal spaces.** In common spaces (garage, entry hall, staircase, etc.) timers will be installed to turn off lighting systems.

**Eco-efficiency parameters relative to construction materials and systems.** In the construction of buildings, a minimum overall score of 10 point must be obtained through the use of some of the following construction solutions:

- a) Construction of a ventilated façade oriented to the south-west ( $\pm 90^\circ$ ): 5.
- b) Construction of ventilated roofing: 5.
- c) Construction of roof garden: 5.
- d) Use of preindustrial systems on at least 80% of the surface of the structure: 6.
- e) Use of preindustrial systems on at least 80% of the surface of the exterior cladding: 5.
- f) Reduction of the average thermal transmittance coefficient  $K_m$  of the different vertical exterior cladding by 10% with respect to the parameter set in point 4.1: 4.

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- g) Reduction of the average thermal transmittance coefficient  $K_m$  of the different vertical exterior cladding by 20% with respect to the parameter set in point 4.1: 6.
- h) Reduction of the average thermal transmittance coefficient  $K_m$  of the different vertical exterior cladding by 30% with respect to the parameter set in point 4.1: 8.
- i) Provision of a system for reuse of rain water falling on the building: 5.
- j) Provision of a system for reuse of building grey water and rainwater: 8.
- k) Use of at least one product obtained from recycling of wastes (construction waste, tyres, waste foam, etc.) for sub-bases, floor covering, insulation panels and other uses: 4.
- l) In cases where there has been a prior demolition phase, reuse of the stone rubble generated in the construction of the new buildings: 4.
- m) The provision of natural cross ventilation for the different proprietary entities in the building: 6.
- n) Use of renewable energy forms to provide the climate control (heating and/or cooling) of the building 7.
- o) Lighting of communal or access spaces using human presence sensors, as long as the lighting system used will not be affected by the frequent switching on and off: 3.
- p) In residential buildings, when openings in the external cladding, either protruding or exposed, double window, or balcony solutions in which the total (frames and glass) has a minimum acoustic insulation for air-carried sound of 28 dBA: 4.

**Suitable spaces for separation of waste.** The different proprietary entities must have, either inside their units or in a community space, a system suitable for the uses involved which allows the separate storage of the different types of waste produced, without prejudice to the applicable provisions of industry regulations.

**Suitable spaces in the street grid for the placement of containers.** It is necessary to plan the allocation of sufficient space in the street grid for the placement of containers or other equipment needed to optimize operations for the collection and transport of solid wastes.

Below is a list of the corrective measures proposed for the construction **phase**.

**Technical Inspection of Machinery.** Construction machinery has to possess a current certificate of technical inspection, which among other things, checks atmospheric emissions.

**Avoidance of generating dust during the construction phase.** In specific cases when the construction activity and work generate a high quantity of dust, the work area will be watered to avoid adverse effects on people and animals.

**Hours of construction work.** The construction work will always be carried out during the day, between the hours of 8:00am and 8:00pm. Work at night has to be explicitly authorized by the city council.

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**Motor vehicles.** All motor vehicles must have all elements capable of producing noise in good working condition so that the noise of the vehicle with the engine running does not exceed the maximum values permitted in the regulations. Additionally, leaving the engine running when not necessary must be avoided.

**Noise level measurement.** A measurement of noise level will be performed if requested for any person affected by disturbances caused by any activity related to the works.

**Identification and signaling of vegetation elements to be conserved.** Trees that are considered unique or of special local interest and which are to be retained, will be identified in order to define and mark out a protection zone with a radius equal to the radius of the tree crown plus 5 meters, in order to avoid affecting the roots

**Transplanting of vegetation elements to be conserved.** If it is not possible to conserve these elements in their current location in the area under study, they will be transplanted to other appropriate locations in the area or the city.

**Avoiding fire risks.** During the construction work carried out in areas near the plants that are to be conserved, great precaution is needed in the use of flammable materials or machinery which while in use could constitute a fire hazard.

**Delimitation of parking areas for machinery, storage of building materials and rubble.** Parking areas for machinery must be minimized and strictly defined, and suitable spaces for storing building materials, as well for collecting rubble, must be defined. This must be carried out by the Environmental Management of the construction work based on the land use plans, and all spaces must be marked using reflective and visible plastic fencing, or any other system that clearly defines the space.

**Containers for selective waste collection.** In the construction area, containers for the selective collection of solid waste generated by workers on the construction project must be installed.

**General clean-up of the area.** When the construction works phase ends, a general clean-up of the un-built areas of the site and the area around the new buildings must be carried out to remove any remaining debris, surplus earth, municipal or solid waste that remains.

**Management of construction waste.** The management of waste generated during the works, as a result of the processes of demolishing existing buildings and construction of new buildings, must be conducted through authorized centers, regulating demolition and other construction waste, as well as other industry provisions relating to solid wastes and local bylaws that complement them or stipulate their deployment.

**Waste management plan.** Project master plans must incorporate a plan for management of construction waste in accordance to demolition and other construction waste best practices. The waste generated must be quantified by types and by phases of the construction and demolition,



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defining the operations of separation or selective collection which are expected to be performed at the site, specifying the method of reuse in situ and/or identifying the authorized waste management entity that will be used, preferably through a process of evaluating such entities.

**Separation at source.** To properly manage waste processes, separation of the different types of waste should be carried out at the source. To this end, the following containers must be installed:

- ▶ For stone waste, which will be recycled or placed in the rubble deposit
- ▶ For wood, metal, glass and packaging, which will be treated by waste recovery companies.
- ▶ For waste generated by trade processes(packaging, paint, electrical materials ...), which will be handled as in the case above. These containers may not be required, if the trades people involved in carrying out the works perform their own waste management. In any case, the way of handling this waste must be properly justified.
- ▶ These containers or receptacles shall be stored inside the construction area.

**Initial separation of the items before demolition.** In as far as possible, prior to demolition, the different elements of non-stone materials which are recoverable should be separated (to be sent to a sorting and recovery plant) and after demolition, the stone elements should be separated to be sent to a rubble recycling center and deposit.

**Proper management of excess earth.** If as a result of earth movements, surplus earth is generated, this must be properly managed, that is, it must be transported to appropriate management centers.