National Sustainable Tourism Master plan for Belize 2030

Presentation at the State of the Coastal Zone Summit June 8th, 2012
Belize Tourism Industry Today
Belize as a tourism destination is characterized by having excellent natural resources.
Belize Tourism Industry - Today

Belize’s low connectivity to EU tourism markets hinders potential arrivals growth and inland road conditions difficult tourism flows throughout the destinations

- Belize has one international airport in Belize City operating mainly flights to/from the USA and neighboring countries
- A second international airport in Placencia is under construction
- Various sea routes are offered by ferries and water taxies to domestic and regional destinations
- National roads and highways are one line roads with low standard conditions
- Many secondary roads to tourism attractions are in unfavorable conditions
Belize 2030 Tourism Goals
Belize’s 2030 Tourism Goals

The target objective of the NSTMP is to more than double overnight tourist arrivals while enhancing average length of stay and daily expenditure.

<table>
<thead>
<tr>
<th>Year</th>
<th>Arrivals</th>
<th>ALOS</th>
<th>Average Expenditure per day (USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>245,026</td>
<td>8.36</td>
<td>133</td>
</tr>
<tr>
<td>2010</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>2020</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2025</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2030</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Belize’s 2030 Tourism Goals

Resulting in a higher value tourism economic contribution as overnight stays are to triple and total overnight direct expenditure is to multiply by five times by 2030

Generated overnights

<table>
<thead>
<tr>
<th>Year</th>
<th>2008</th>
<th>2010</th>
<th>2015</th>
<th>2020</th>
<th>2025</th>
<th>2030</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>2,047,327</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total overnight expenditure (USD)

<table>
<thead>
<tr>
<th>Year</th>
<th>2008</th>
<th>2010</th>
<th>2015</th>
<th>2020</th>
<th>2025</th>
<th>2030</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>247,720.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

CAGR: 4.9%  Multiplier: 2.8
CAGR: 7.6%  Multiplier: 5.1
Belize’s 2030 Tourism Goals

The target for cruise is to double visitor arrivals by 2030 while moderating tourism growth in the short term in order to better prepare for higher expected growth in the medium term.

<table>
<thead>
<tr>
<th>Year</th>
<th>Arrivals</th>
<th>Average Expenditure per Visit (USD)</th>
<th>Total Cruise Expenditure (USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>597,370</td>
<td>57</td>
<td>33,780,000</td>
</tr>
<tr>
<td>2010</td>
<td>715,797</td>
<td>57</td>
<td>41,494,802</td>
</tr>
<tr>
<td>2015</td>
<td>771,117</td>
<td>58</td>
<td>47,214,506</td>
</tr>
<tr>
<td>2020</td>
<td>1,017,874</td>
<td>59</td>
<td>68,555,462</td>
</tr>
<tr>
<td>2025</td>
<td>1,343,594</td>
<td>60</td>
<td>99,542,531</td>
</tr>
<tr>
<td>2030</td>
<td>1,504,826</td>
<td>60</td>
<td>133,785,162</td>
</tr>
</tbody>
</table>

CAGR: 2.1%

Multiplier: 4

CAGR: 6.5%

Multiplier: 1.6

CAGR: 4.3%

Multiplier: 2.1
Belize’s 2030 Tourism Goals

The total yearly economic contribution of combined overnight and cruise sectors is expected to multiply by five times in the year 2030.

<table>
<thead>
<tr>
<th>Year</th>
<th>2008</th>
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<th>2020</th>
<th>2025</th>
<th>2030</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Tourism expenditure (USD)</td>
<td>310,190,071</td>
<td>446,858,671</td>
<td>703,299,271</td>
<td>1,025,429,721</td>
<td>1,388,192,000</td>
<td></td>
</tr>
</tbody>
</table>
Belize Tourism In Markets 2030
Belize Tourism in Market 2030

Market growth driven by European markets, higher penetration of current (US/Canada) source markets, a consolidated share of niche market segments and dynamic cross-border flows.

- USA
  - Canada
  - European

- Few but strong source markets
- Domestic travels as a promotional tool
- Dynamic cross-border movement
- Specialized in niche market segments

- Belizeans
- Visiting friends and family
- Retirement program

- Long-haul travellers on regional itineraries
  - Regional market

- Cavers, divers, sports fishing, birdwatchers
- Pocket cruisers, yachters & sailors
- Honeymooners, adventure seekers
- Others...

Few but strong source markets
Belize Tourism Product Development
Belize Tourism Product Conceptualization

The optimal portfolio is composed of six umbrella products based on competitiveness – importance – attractiveness criteria for Belize tourism development

Product Development Approach:

- Optimal portfolio derived from a long list of possibilities
- Many specific tourism activities can be further developed under each main tourism motivations
- First consolidate what is in an introductory phase, and secondly develop which is optimal for Belize
- Focused product development under a restrictive budget scenario in order to continue tourism growth

Tourism Product Conceptualization

1. Cultural
   - Heritage
   - Living Culture

2. Nature-based
   - Eco-tourism
   - Adventure

3. Sun & Beach
   - Luxury
   - Pristine

4. Cruise
   - Conventional
   - Pocket

5. Nautical
   - Private vessel
   - Leased vessel

6. Leisure & Entertainment
   - Shopping
   - Entertainment
Belize Tourism Destination Development
Tourism will be distributed into other destinations, mobilizing development to emerging destinations by 2030.

By 2030 new destinations will profit from the benefits of increased tourism economic activity.
Belize will have seven unique tourism destination that all together converge in a cohesive offering that make Belize a distinctive and highly competitive destination.
Country Scale

Tourism development model summary at a national level for Belize

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 Multiplier

Hotel rooms (2030): 13,754

New hotel rooms (2010 – 2030): 6,869
The level of density refers to the accommodation units that are built per land unit and therefore shape the landscape and the scenery.

0
Untouched nature

1
Very low density
Approx. 2 – 10 units/hec

2
Low density
Approx. 30 -50 units/hec

3
Medium density
Approx. 75 – 100 units/hec

4
High density
More than 150 units/hec

* Units can be appartments or rooms
* 1 hectar are 2.47 acres
Country Scale

The hotel development model for Belize proposes hotel and serviced accommodation facilities development in favor of other typologies.

Accommodation Development Model (2010 – 2030)

6869 New Hotel rooms by 2030
Belize 2030 Master plan
Approaches
Approach 1: Product development

**GOAL:** Optimization
Belize 2030 Vision Approaches

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 demands.
Approach 2: 
Integrated site development
**GOAL: Competitiveness and Sustainability**
Belize 2030 Vision Approaches

The integral development of tourism sites focuses on completing the entire value chain of experiences of one site before moving to another site.

Nautical Tourism Value Chain Development Site 1

Nautical Tourism Value Chain Development Site 2

Nautical tourism site 2: Consolidation

Nautical Tourism Site 1: Consolidation

Nautical Tourism Site 1: Development

Nautical Tourism Site 2: Development
Approach 3: Experiential quality enhancement

**GOAL: Competitiveness**
Belize 2030 Vision Approaches

Increase visitor satisfaction and confidence in Belize as a tourist destination by enhancing the services quality and by creating spaces of high value.

Professional and friendly human resources

Enhanced visual context

Comfort of feeling safe
Approach 4: 

**Empowerment of stakeholders**

*Goal: Leadership & Optimization*
Stakeholder participation and channelling of benefits is key in order to reach long term sustainability and maximum profitability of Belize’s tourism sector.

**Belize 2030 Vision Approaches**

**Direct Benefits**

- SME and Business Development
- Poverty Alleviation
- Environmental /Asset Conservation

**Tourism Value Chain**

- Travel Agency
- Transportation
- Accommodation
- Food & Beverage
- Handicraft & Souvenir
- Tourism Asset / site
- Tours, excursions & leisure
- Support services

**Planning & Decision Making**

- Policy Level Institution
- Executive Level Public Sector
- Private Sector Associations
- Civil Society Organizations

**Strategic Alliances & Partnerships**
Approach 5: Proactive solution to funding sources

Goal: Leadership & Sustainability
Belize 2030 Vision Approaches

Proactive mechanisms to finding funding solutions through self-funding systems and committed search for investment partners

- Strategic partners
- Coordination & Planning of Investment
- National Sustainable Tourism Trust Fund
- Investment
- New Tourism Development
NSTMP - Tourism Development Macro Programs
Belize’s National Sustainable Tourism Master Plan 2030 is structured into five macro programs according to the subject focused upon.

I. Diagnostic of the tourism sector

A. Definition strategic framework

II. National Sustainable Tourism Master Plan for Belize 2030

B. Destination Physical Plan

C. Implementation programs

National Tourism Governance Macro Program
National Tourism Sustainability & Quality Assurance Macro Program
National Tourism Infrastructures Macro Program

National Tourism Marketing Macro Program
Tourism Product Development Macro Program

D. Budget Analysis of the Macro Program
E. Project Implementation Manual

Key actions will be defined trough the different macro programs to reach the strategic goals of the Sustainable Tourism Master Plan of Belize.

Source: T&L, 2011
Product Development Macro Program

The Product Development Macro program covers all topics to be developed per each tourism product under the portfolio.

- **Business & Product Development**
  - Specific interventions and investments to support product

- **Infrastructure and Accessibility**
  - Accessibility
  - Support services consolidation

- **Capacity Building**
  - Continuous training

- **Governance**
  - Regulations, norms and law

- **Safety and Security Assurance**
  - Operational guidelines
  - Safety & Security
  - Integrated Quality Management system

- **Sustainability**
  - Tourism product land use plan
  - Asset management and conservation
  - Inclusion mechanism

- **Marketing and Awareness**
  - Product Tourism Brands
  - Tourism product club
  - Promotion, communication & PR
  - Product specific awareness development
Master Plan
Project Implementation Manual (PIM)
The NSTMP implementation will be guided by a Coordination Office intended to be a technical team within the Ministry of Tourism and responsible for leading implementers and consultants.
The PIM intents to aid the Coordination Office in the initial phases of the NSTMP implementation in organizing stakeholders, prioritization, budget allocation, risk management and M&E.

Components of the Project Implementation Manual

**Roles and Responsibilities**
- Coordination Office
- Implementation institutions
- Strategic Partnerships

**Program Implementation key stakeholders**
- Policy Level Leadership
- Executive level leadership
- Strategic Partnerships

**Budget Considerations**
- Short-Med-Long term funding sources
- Budget scenario analysis

**Priority Investment Projects**
- Key public investment projects
- Key Private sector investment concepts

**Results Framework**
- Strategic indicators
- Macro-programs indicators

**Risk Analysis**
- Identification of risk level
- Mitigation measures
Inland Ecolodge

• Adventure: Adventure Ecolodge: High-end and low-density accommodation facilities accessible to inland adventure travelers with amenities, equipment and services catering to the needs of adventure activities.

• Relaxing Ecolodge: High-end and low-density accommodation facilities appealing for travellers seeking to enjoy pristine nature and closeness to archeological sites.

Diving Lodge

• Mid to High-end and low-density accommodation facilities with access to the coral reef and catering to the needs of diving enthusiasts with amenities, equipment and services diving activities.

Fishing Lodge

• Mid to High-end and low-density waterside accommodation facilities with access to the sea, lagoons or rivers catering to the needs of sports fishing enthusiasts.

Beach Boutique Hotel

• High-end to luxury and very low to low-density coastal accommodation facilities with beach access and catering to the needs of exclusive clientele looking to relax and enjoy pristine beaches and complementary services.

Beach Resort

• Mid to High end mid-density coastal accommodation facility with beach access and catering to the needs of sun and beach holidays and complementary activities.
Cruise Terminal
- Development of secondary cruise port and complementary services in Belize City for conventional cruise market
- Development of a pocket cruise port and complementary services in south eastern coast Belize.

Marina Mix Development
- Mid to High end and mid-density marina facilities and services with mix development components such as accommodation, shopping, leisure facilities to complement offering to yachting, sailing and boating enthusiasts.

Flagship Urban Hotel
- High-end and mid-density urban hotel of an internationally recognized hotel chain and with an attractive and iconic building catering to the needs of visitors to Belize city with the goal of increasing notoriety of Belize as an internationally recognized destination.

Shopping and Entertainment zone
- Development of mid to high-end commercial area with brand name shops and attractive open air leisure facilities.

Private Island Development
- Luxury and very-low to low density mix development use business models for private islands that cater to very exclusive clientele.
National Sustainable Tourism Master plan for Belize 2030

SNACK BREAK

July, 2011