



Dangriga Tourism Destination Development Plan

Dangriga Tourism Destination Development Plan

Praxi5 Advisory Group Ltd.

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Table of Contents

Acknowledgements	1
Acronyms.....	2
Foreword	4
Executive Summary	4
SECTION 1: BACKGROUND	9
1 Tourism in Belize	10
1.1 The Belize Tourism Product	10
1.2 The Macro-Environmental Profile Of Belize Tourism.....	12
1.3 Institutional & Regulatory Framework.....	19
1.4 Institutional Framework of Tourism in Dangriga	22
2. The Planning Context	23
2.1 Key Elements of the External Environment Scan	23
3. The Southeast Coast Tourism Market.....	33
3.1 Southeast Coast Tourism Trends	33
3.1.1 Overnight Sector	36
3.1.2 Tourism training.....	40
3.1.3 Cruise Sector	40
3.2 Dangriga Tour Operators	42
3.3 Stann Creek Tour Guides	43
3.4 Main Competitors, Needs of Target Markets.....	45
3.5 Profile of Southeast Tourism Product.....	48
3.6 Dangriga Tourism Assets	50
3.7 Priority Issues for Tourism Product Development.....	51
3.8 Bottlenecks Hindering Competitiveness.....	53
3.9 Strengths and Opportunities.....	54
SECTION 2: THE TDDP	57
4. Vision for Dangriga Tourism Industry.....	58
4.1 Vision Statement	58
4.2 Purpose Statements (Goals)	58
5. Strategic Objectives and Actions	60
6. Tourism Investment Project Ideas	72
6.1 Identification of Priority Investments	72

6.2	Project Funding Mechanisms.....	76
6.3	Product Clusters, Tour Itineraries & Experiences	78
7.	Management Arrangements	80
8.	Coordination and Monitoring	83
9.	Strategies and Monitoring Indicators for Success	85
10.	Implementation Schedule.....	87
SECTION 3: APPENDICES.....		90
Appendix 1 – The TDDP Planning Process		91
Appendix 2 – Asset Readiness Rating Criteria		94
Appendix 3 – Dangriga Tourism Assets.....		97
Appendix 4 – Meeting Participants		106
Appendix 5 – Map of Southeast Coast Destination		114
Appendix 6 – Quarterly Status Report Form.....		115
Appendix 7 – Selected References		122

Boxes

Box 1: Consumer Behavior Trends.....	27
Box 2: Laws Related to Tourism	31
Box 3: Tourism Development (internal strengths)	55
Box 4: Tourism Development (external opportunities)	56

Figures

Figure 1: The Tourism Phenomenon – Components of Tourism	11
Figure 2: Direct Contribution of Travel and Tourism	14
Figure 3: Tourism Contribution to Belize’s GDP.....	14
Figure 4: The Contribution of Tourism to an Economy	15
Figure 5: Total Contribution of Tourism to Belize’s GDP	16
Figure 6: Tourism Expenditures as a Percentage of Total Exports.....	18
Figure 7: Total Contribution of Tourism to Belize’s GDP	19
Figure 8: Ministry of Tourism and Civil Aviation	20
Figure 9: Registered Tour Guides	44
Figure 10: Tour Guide Skill Set	45
Figure 11: Dangriga Problem Tree	52

Tables

Table 1: Belize GDP Growth (in millions of dollars)	13
Table 2: Total Number of Overnight Arrivals for Belize (BTB).....	17
Table 3: Total Tourism Expenditures in Belize (in BZ\$m) (BTB)	18
Table 4: Stann Creek Annual Visitation Statistics.....	33
Table 5: Total Number of Hotels in Belize & Southeast Coast	35
Table 6: Total Number of Rooms in Belize & Southeast Coast	35
Table 7: Hotel Occupancy Rates (BTB).....	36
Table 8: Average Daily Expenditure (\$US), 2016 and 2017.....	37
Table 9: Average Length of Stay (nights) – National	37
Table 10: Active Insured Persons within the Tourism Industry – Stann Creek	39
Table 11: Institutional Tourism Training in Belize 2018.....	40
Table 12: Harvest Caye Cruise Arrivals (Passengers)	41
Table 13: Types of Tour Offerings	43
Table 14: CPM Critical Success Factors	46
Table 15: Competitive Profile Matrix (Dangriga)	48
Table 16: Dangriga Tourism assets Assessment.....	51
Table 17: Bottlenecks Hindering Dangriga Town’s Competitiveness	53
Table 18: Dangriga Priority Investment Proposals	72
Table 19: Financial Institutions	77
Table 20: Dangriga priority product clusters	78
Table 21: Stakeholder Sub-Sectors	92

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Acronyms

ARR	Average Room Rate
BAA	Belize Airport Authority
BBRS	Barrier Reef System
BMA	Belize Management Agency
BTB	Belize Tourism Board
BTIA	Belize Tourism Industry Association
CPBL	Citrus Products of Belize Limited
CPM	Competitive Profile Matrix
CTO	Caribbean Tourism Organization
DCA	Department of Civil Aviation
DTC	Dangriga Town Council
EIA	Environmental Impact Assessment
FSTV	Fort Point Tourism Village
FGD	Focus Group Division
GDP	Gross Domestic Product
GOB	Government of Belize
NCL	Norwegian Cruise Line
NGC	National Garifuna Council
GSTC	Global Sustainable Tourism Council
ITVET	Institute Technical and Vocational Education Training
LOS	Length of Stay
LTC	Local Tourism Council
MDP	Municipal Development Plan
MTCA	Ministry of Tourism and Civil Aviation
MPA	Marine Protected Areas

NGO	Non-Government Organization
NICH	National Institute of Culture and Heritage
NSTMP	National Sustainable Tourism Master
PESTEL	Political, Economic, Socio-Cultural, Technological, Ecological, and Legal
p5	praxi5 Advisory Group Ltd.
POS	Point of Sale
SBDC	Small Business Development Center
SCOT	Strengths, Challenges, Opportunities and Threats
SHR	Southern Health Region
SIB	Statistical Institute of Belize
TDDP	Tourism Destination Development Plan
TOR	Terms of Reference
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNWTO	United Nations World Tourism Organization
USA	United States of America
USD	United States Dollar
VCT	Voluntary Counselling Testing Center
VRBO	Vacation Rentals by Owners
WTTC	World Travel & Tourism Council

Foreword

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

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

It is under this mark, that in 2018 the Ministry of Tourism and Belize Tourism Board began the roll-out of a platform, known as Monitoring Coordinating Committees (MCCs), within four of our priority destinations. As a participatory mechanism, the MCCs provide an essential opportunity for the public, private and civil sector in our destinations to collaborate in the planning, development and monitoring of tourism development in their communities. Since 2018, we have established MCCs in the districts of Orange Walk and Stann Creek, namely the areas of Dangriga, Hopkins and Placencia. The introduction of the committees has been well received by the communities, industry partners and destinations, and their impact has already generated tangible results in the development of destination-specific Tourism Development Plans. These plans not only align the strategic principles and recommendations of our National Sustainable Tourism Master Plan, but also integrate and highlight the tourism development priorities and vision of our local stakeholders. Most importantly, they serve as a tool for all of us to gauge our actions and to measure our ability to meet the challenge set by our NSTMP.

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

Yours in Tourism,

Manuel Heredia

Jose Manuel Heredia Jr.

Minister of Tourism and Civil Aviation

Executive Summary

Although tourism is a relatively new economic sector given that Belize started making it a priority in the late 1990s, it is now one of the leading economic pillars of the country and is the nation's leading foreign exchange earner. In 2018, tourism is forecasted to account for about 17.2% of Belize's GDP directly.

The Southeast Coast of Belize includes the Placencia Peninsula and a coastline that is one of the most highly sensitive natural ecosystems within Belize. This area includes established destinations such as Placencia and Hopkins, emerging destinations such as Dangriga, and what the National Sustainable Tourism Master Plan refers to as a "new development area" between Riversdale and Hopkins. With 122,718 overnight visitors recorded in 2017, the Southeast Coast of Belize is the third most visited destination in the country. Only Ambergris Caye and Caye Caulker registered higher visitor numbers.

Stakeholders defined the following vision statement to guide the development of Dangriga as a tourism destination.

Dangriga, a welcoming destination, offers our visitors the opportunity to immerse themselves in unique, authentic, and diverse eco-cultural tourism experiences in the living barrier reef, clean beaches, pristine rainforests, and Belizean culture rich in tradition and heritage.

To realize this destination vision, the Dangriga Destination must invest heavily in developing and delivering iconic experiences that are differentiated from products offered in Hopkins and Placencia and improving the visitor journey through improvements to town infrastructure, quality assurance and security. This will be done by focusing on four strategic thrusts/goals, which are:

Thrust 1: Tourism Education & Awareness

Dangriga is one of the most underdeveloped destinations in the Southeast Coast. There are only a few hotels in the area, and restaurants cater mainly to local customers. Consequently, the quality of services lacking in many aspects and the experience of stakeholders with the tourism industry is limited.

Residents and private sector will need to understand better how tourism can potentially positively impact the local economy for the community to buy-in to tourism. For the destination to develop sustainably, as is envisioned, it will need the buy-in of the

community and local stakeholders. This thrust aims to create greater awareness and garner widespread buy-in by local stakeholders.

Thrust 2: Tourism Products and Services Development

There is a very limited variety of experiences (tours) being offered in Dangriga, and these tours are mainly marine focused. These include mostly short day-trips to nearby islands within the South Water Caye Marine Reserve. Tourism stakeholders realize that there are many other tourism assets that they are not yet tapping into. For instance, there are many terrestrial-based natural attractions and protected areas in the area, and of course, there is the rich, intangible cultural heritage of the Garinagu. The Dangriga destination will need to develop new experiences, expand its services and define its brand based on what is most iconic about this destination.

Thrust 3: Skills & Capacity Development for Tourism Related Services

Having a cadre of well-trained personnel is critical to the development of a high-quality tourism product for the Dangriga destination. Tourism business operators in Dangriga indicate that the majority of new employees do not possess the requisite skills for service jobs and lack a good understanding of the tourism sector. Often, employers are compelled to provide on-the-job training to address these gaps. Access to training in tourism is a critical factor for addressing workforce development needs. There is a need to have educational institutions and programs established that can provide the much-needed training.

Thrust 4: Branding and Marketing of Destination

The destination brand is an essential element of differentiating and positioning Dangriga as part of the Belize product. Having a clearly defined brand can help set Dangriga apart from other destinations in the Southeast Coast and the country. The brand also promotes recognition and represents the destination's promise to visitors. Dangriga has to differentiate its product in order to position itself successfully in an increasingly crowded marketplace.

It is therefore essential that Dangriga develop a brand that captures the unique sense of place and what is most iconic about it. This is important not just to attract visitors but also for the community and other tourism stakeholders in order to more effectively promote a shared sense of place.

The top strategic objectives for the destination are listed below.

1. Enhance community awareness
2. Enhance critical infrastructure that supports tourism
3. Develop Cultural Heritage and Cultural Attractions and Experiences
4. Diversity marine and terrestrial-based attractions and experiences
5. Strengthen local capacity to provide tourism services
6. Create a destination brand for Dangriga

The Dangriga Tourism Destination Development Plan (TDDP) is set out in three sections, as follows:

Background:

This section lays out the planning context as follows: 1) A summary of the critical elements of the external environment scan, which is essentially the results of a situational analysis that considered the internal strengths and weaknesses of the destination, as well as 2) the external opportunities and challenges/risks associated with the destination.

This section then describes tourism in Belize and provides a profile of the tourism market in Dangriga.

Three significant aspects describing tourism in Belize include:

- 1) the Belize tourism product;
- 2) a macro-environmental profile of tourism in Belize; and
- 3) the institutional and regulatory framework of the national tourism sector.

A discussion focusing on the specific destination then follows that includes:

- 1) The Dangriga tourism product;
- 2) The tourism assets of the destination;
- 3) Tourism trends of Dangriga;
- 4) Tour operators and guides of the area; and
- 5) The main competitors for the destination and the needs of the target markets.

The TDDP:

This section of the report is the essence of the TDDP. It describes the vision statement for the Dangriga tourism industry, as framed by the stakeholders who participated in the TDDP planning process; presents a list of the strategic objectives and actions that will need to be implemented in order to achieve the tourism vision of the destination; and lists

tourism project ideas that aim to provide guidance for future tourism-related priority investments in Dangriga.

The rest of this section presents the outline of a monitoring and evaluation (M&E) plan that will provide tourism stakeholders with coordination and monitoring guidance. A discussion of who will champion the implementation of the plan and how this implementation will be carried out is included.

A timetable for accomplishing the strategic priorities of the TDDP is included in this section. The table lists expected the strategic objectives, key activities, time-frame by year/quarters, and responsible parties. This timetable provides guidance to the responsible parties for the development of annual work plans and budgets.

Appendices:

Supporting documents are included as Appendices. These documents provide additional information related to the main sections of the TDDP. Appendix 1 describes the planning process that was used to define the main structure of TDDP and the method that was followed to prepare the plan.

The other Appendices include 1) Dangriga Tourism Assets, 2) Asset Readiness Rating Criteria, 3) Meeting Participants, 4) Map of Dangriga, 5) Quarterly Status Report, and 6) Selected References/Bibliography.

SECTION 1: BACKGROUND



1 Tourism in Belize

1.1 The Belize Tourism Product

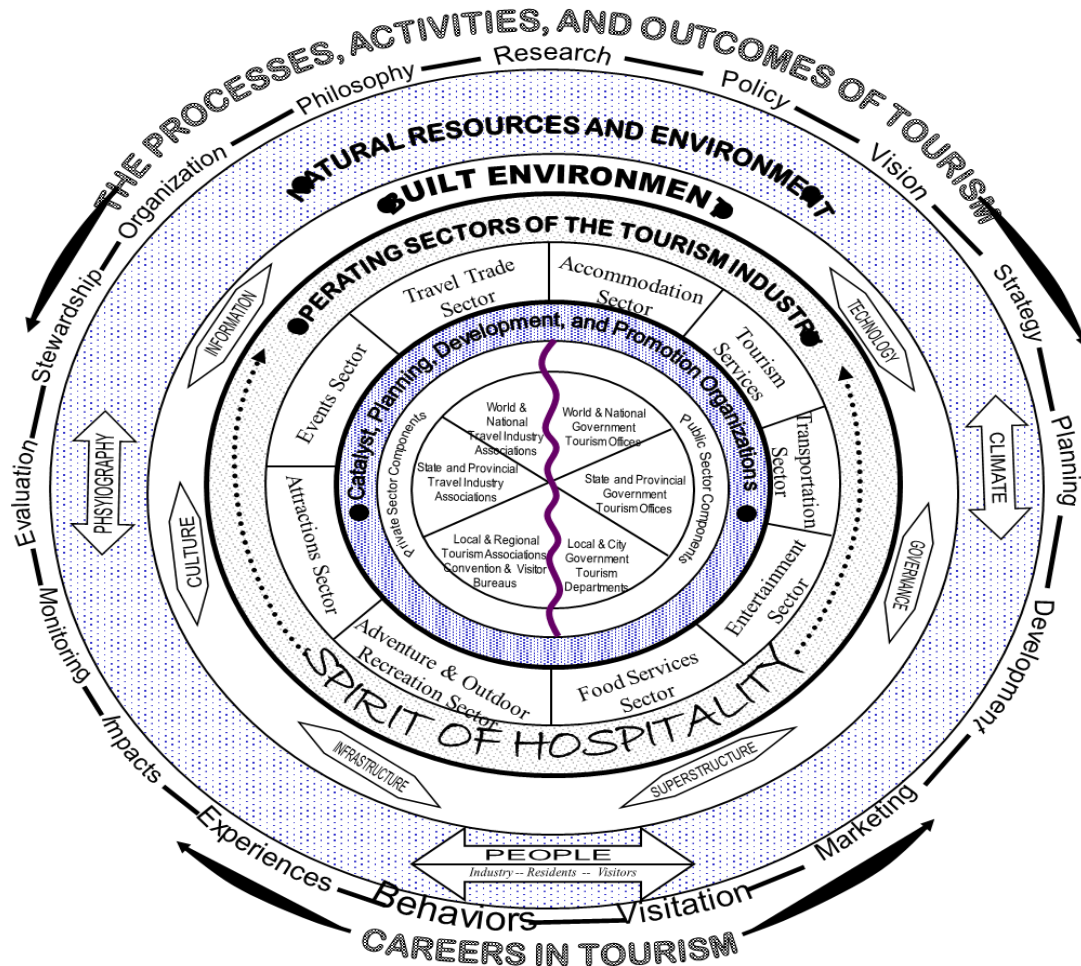
Belize's current macroeconomic activity is driven primarily by traditional exports such as sugar, bananas, and citrus. Most recently, Belize had some success exporting petroleum (a non-renewable resource), however, is a non-renewable resource, the supply is now dwindling. A thriving sector of the economy today has been tourism. Tourism is a relatively new economic sector given that the country started making it a priority in the late 1990s and today, tourism is now one of the main pillars of Belize's economy and is the nation's leading foreign exchange earner. Given the challenges the traditional Belizean export currently faces in the global markets; tourism will inevitably continue to be one of the nation's key driving economic activities.

Tourism is a complex phenomenon. It is comprised of many interrelated sectors and industries and must, therefore, be carefully managed. The Tourism Phenomenon Model (Figure 1) presented by Goeldner and Ritchie in 2008 illustrates this concept. The model shows the complexity of the tourism product and its reliance on other inter-related and supporting activities. Key to the product is the natural and the built environment, which in large part depend on Belize's natural and cultural resources, and ecology. The National Sustainable Tourism Master Plan (NSTMP) is a Strategic Framework for sustainable tourism development in Belize. When the tourist experiences the full tourism product, it is mostly hospitality products that are consumed, although the natural and cultural attractions and build environment are driving their motivation to choose the destination. As highlighted in the NSTMP and the model (Figure 1), the main hospitality products are:

- | | |
|-----------------------------|--|
| 1. The Accommodation Sector | 6. Adventure and Outdoor Recreation Sector |
| 2. Tourism Services | |
| 3. Transportation Sector | 7. Attractions Sector |
| 4. Entertainment Sector | 8. Events Sector |
| 5. Food Services Sector | 9. Travel Trade Sector |

Belize has products in all these critical sectors albeit with variances in a variety of services or experiences and levels of development of the same. For example, as will be evident from the analysis, the accommodation sector and adventure and outdoor recreation sector are more developed than the transportation and entertainment sectors.

FIGURE 1: THE TOURISM PHENOMENON – COMPONENTS OF TOURISM¹



Belize's tourism product has been growing and expanding over the years. What was once a product with Ambergris Caye being the main attraction is now a product with multiple destinations including the Cayo District, the Placencia Peninsula, and a multitude of natural resources attractions inland and offshore.

The Belize tourism product consists of the following major categories of assets:

1. The marine and barrier reef system;
2. Maya Archaeological Sites;
3. Subtropical forest; and
4. A multi-ethnic population with varying cultures and sub-cultures.

¹ Source: Goeldner/Ritchie, *Tourism: Principles, Practices, Philosophies*, 2008

The NSTMP further identifies Belize's main tourism assets specifically as follows:

1. The Barrier Reef system
2. The Blue Hole Natural Monument
3. The Caracol Archaeological Site
4. The Chiquibul Caves System

As noted above, the central component of Belize's tourism product is its natural environment. According to the Belize Tourism Board's (BTB) Visitor's Satisfaction survey in 2016, the main activities that visitors undertook while visiting Belize were marine activities. Approximately 70% of visitors reported that they "snorkelled" and 21% reported that they went "diving". Other activities that most reported engaging in were fishing, kayaking, and sailing. The survey reported that 27% participated in "jungle and rainforest expeditions". The survey also tracked the places where visitors claimed to have visited, and overwhelmingly, these were the marine areas of the country. Some 42% reported going to offshore islands, and 55% visited the Barrier Reef while 43% reported visiting marine protected areas. 38% visited Archaeological sites, and 36% visited National Parks². These figures provide evidence that the main tourism activities that visitors engage in when visiting Belize are marine activities and the rainforest and jungle, all part of the natural environment with the exception of the archaeological sites (part of the built environment). It is this natural environment, this tourism product that gives Belize a competitive advantage in tourism.

1.2 The Macro-Environmental Profile Of Belize Tourism

Belize is a small nation-state with a land mass of almost 9,000 square miles and a population approaching 400,000 persons. As mentioned earlier, the main economic activity is comprised of agricultural exports and some light manufacturing. Belize has a relatively small economy which has shown slow but consistent growth over the last five years (See Table 1). The GDP growth rate averages between 2% and 3% driven by the tertiary (services) sector. The slow growth rate reflects a struggling economy and the country continues to assess the viability of certain sectors to be the drivers of the economy. The Belize government has always seen tourism as one of these drivers.

² Travel and Tourism Digest 2016, BTB

Table 1: Belize GDP Growth (in millions of dollars)³

2013	2014	2015	2016	2017
2,613.9	2,719.7	2,822.9	2,809.2	2,844.1

Tourism is Belize's number one export income earner, and in 2018 it is forecasted to account for about 17.2% of Belize's GDP directly, and with its broader (direct and indirect) economic impact, it will account for 45% of GDP (Figure 2). In 2017, the GDP direct contribution to the economy of tourism was 15% (BZ\$555m) with a wider contribution of 41.3% (BZ\$1.5b) Figure 3. These figures illustrate a steady increase over the years and confirm that tourism is a critical pillar of the Belizean economy.

The concept of direct contribution and total contribution (multiplier effect) is an important one. Often, the economic impacts of tourism activities are measured only by those activities in the hospitality industry, e.g. hotels, restaurants, tours, etc. However, in reality, tourism indirectly impacts many other industries, such as transportation, construction, agriculture, banking, among others. For instance, the growth in tourism translates into higher demand for new transportation options, drives new construction of hotels and resort, and requires additional food supplies for tourists. It is for this reason that the World Travel and Tourism Council accounts for a more extensive contribution of tourism to an economy (Figures 2 & 3) (2018 Belize Economic Impact Report, WTTC)⁴ and it is for this reason that tourism is seen as a driving force to assist Belize in its economic development. It is evident from Figure 4 that travel and tourism has a significant correlation with other economic activities.

³ Source: Statistical Institute of Belize, March 2018.

⁴ 2018 Belize Economic Impact Report, World Travel and Tourism Council

FIGURE 2: DIRECT CONTRIBUTION OF TRAVEL AND TOURISM

BELIZE: DIRECT CONTRIBUTION OF TRAVEL & TOURISM TO GDP

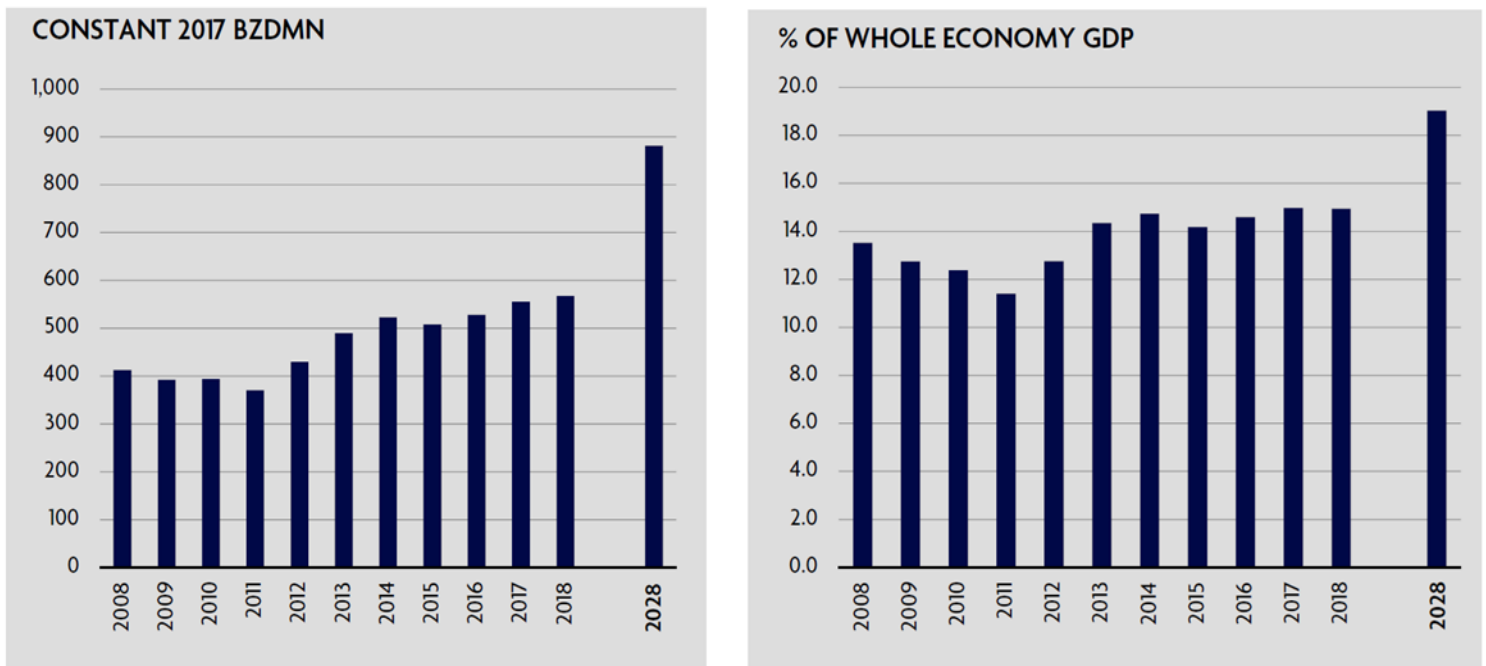
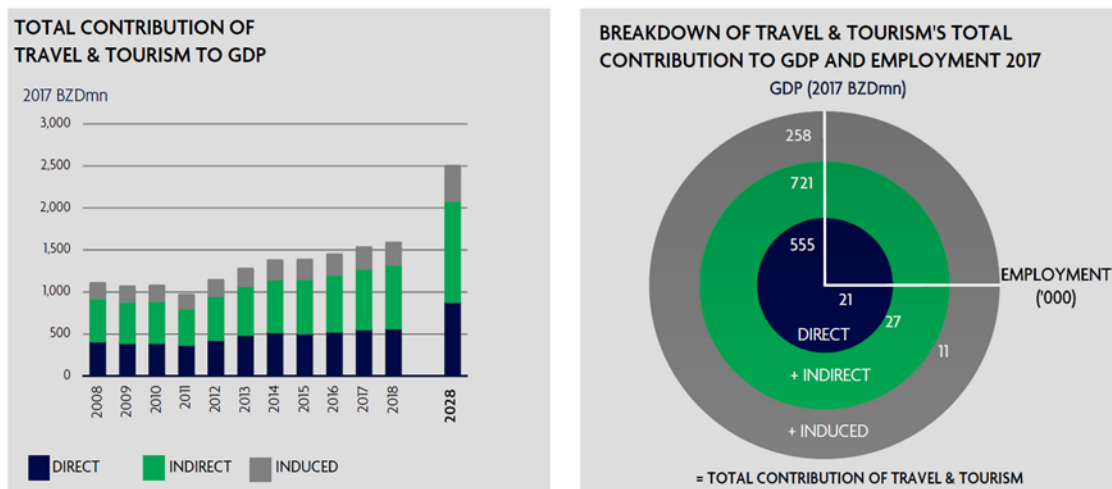
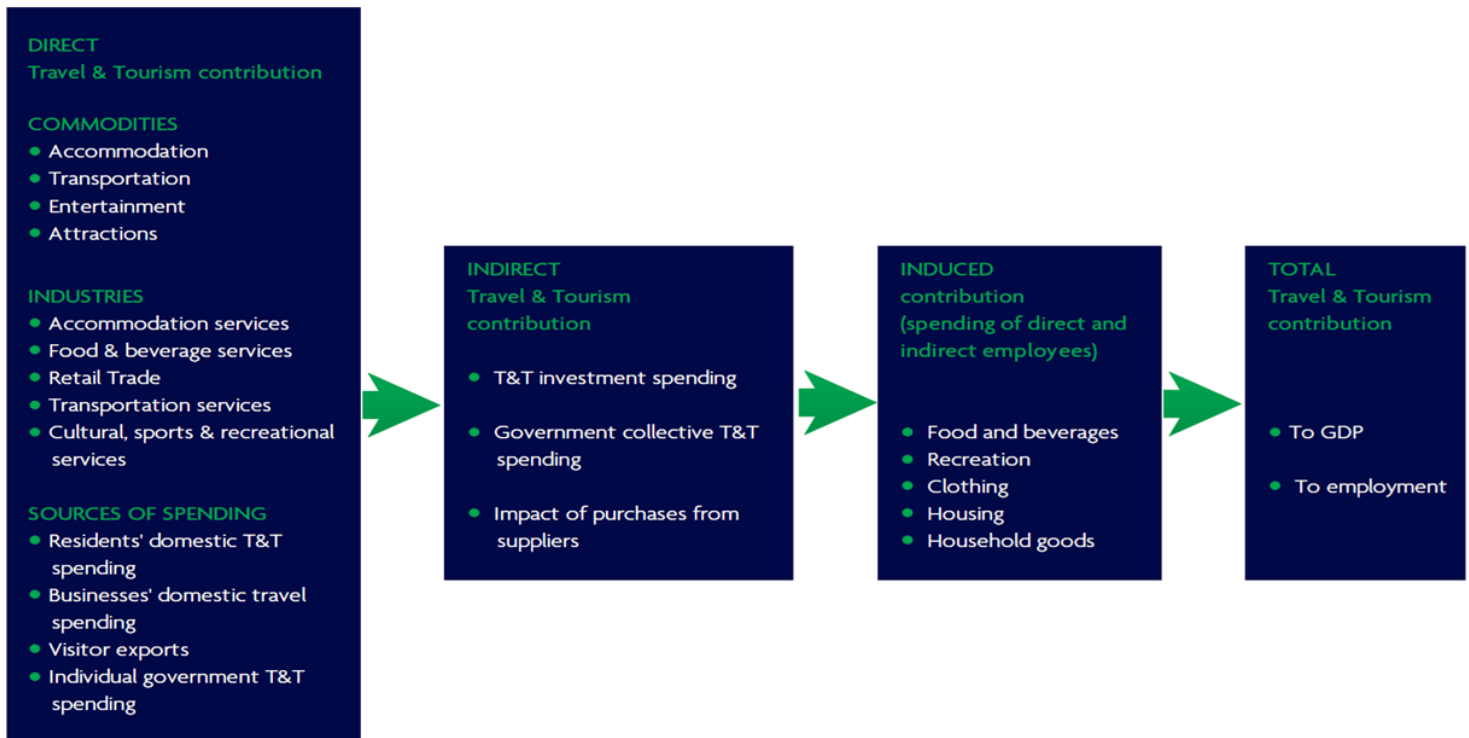


FIGURE 3: TOURISM CONTRIBUTION TO BELIZE'S GDP⁵



⁵ Source: WTTC Economic Impact Report, 2018

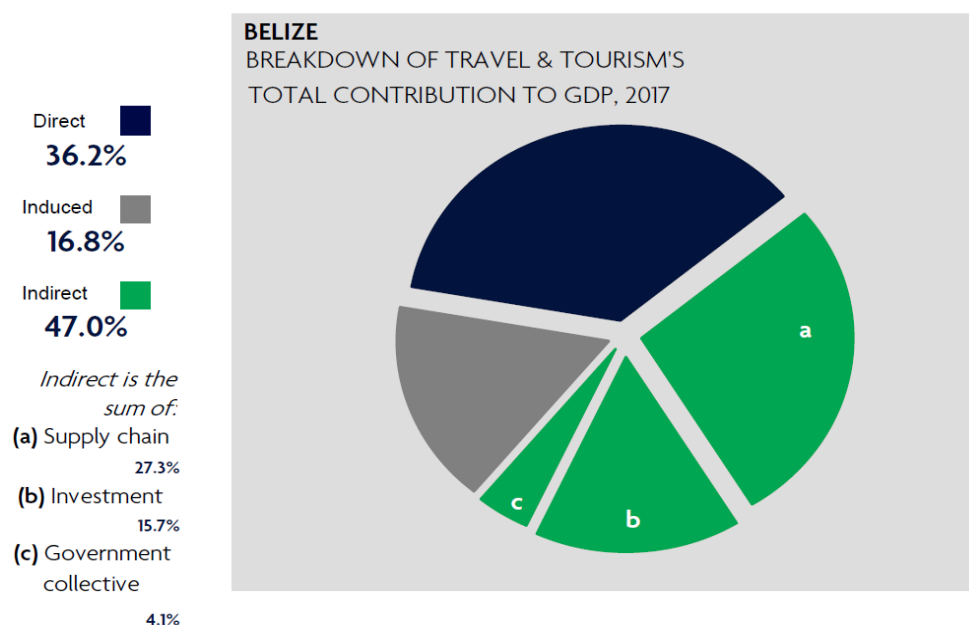
FIGURE 4: THE CONTRIBUTION OF TOURISM TO AN ECONOMY⁶



As is evident in Figure 5, the additional tourism activities contribute the most to the Tourism GDP activities. The investment spending by government and expenditure by private sector entities is responsible for 47% of the contribution. When the induced activities are included, these non-direct activities represent a 63.8% total contribution to Belize's Travel and Tourism segment of GDP.

⁶ Source: WTC Report

FIGURE 5: TOTAL CONTRIBUTION OF TOURISM TO BELIZE'S GDP



¹ All values are in constant 2017 prices & exchange rates

Belize continues to see growth in tourism with the trend showing a record year for arrivals in 2018. The latest Belize Tourism Board (BTB) release states, “*The latest tourism statistics for the first quarter of 2018 indicate that Belize’s popularity as a must-visit destination in Central America continues to set unprecedented records.*”⁷ The data shows that Belize’s tourism arrivals in the first quarter of 2018 have increased by 22.5% (overnight) and 4.6% (cruise) over the same period in 2017. There is an apparent increase in interest in Belize as a tourism destination and the trend in increase visitation has continued over the last five years. Although Belize is a small tourist destination compared to some of the more popular destinations in the region, it continues to experience an upward trend in visitation. If one compares Belize’s tourism arrivals to Jamaica’s in 2017, Belize hosted some 1.5 million visitors while Jamaica hosted some 4.3 million visitors. Costa Rica is often cited as a main competitor to the Belize tourism product. In 2017, Costa Rica hosted some 3 million visitors. Clearly, if success is measured solely by visitor arrivals, it can be said that Belize has considerable room for growth. However, there are many cautions associated with measuring tourism primarily by tourism arrivals.

Belize’s growth is steadily trending upward. In 2013, Belize’s overnight tourist arrivals were 294,177, and in 2017, this figure increased to 427,076 arrivals. This is an increase of more than 100,000 in five years. As it relates to cruise visitors, in 2016 Belize hosted over

⁷ Belize Tourism Board Release, April 11, 2018

1 million cruise visitors for the first time (BTB unpublished statistics, 2018). This increase is very positive for Belize, especially the increase in overnight visitors given the importance of that segment to Belize's economy. This growth can be assumed mainly due to the global economic upturn in Belize's main tourism markets and the arguable inelastic demand (in terms of price sensitivity) of Belize tourism product to its market segment (Table 2).

TABLE 2: TOTAL NUMBER OF OVERNIGHT ARRIVALS FOR BELIZE (BTB)

Type	2013	2014	2015	2016	2017
Overnight	294,177	321,220	341,161	385,583	427,076
Cruise	677,350	968,131	957,975	1,005,394	1,014,231

These growth rates are a reflection of the growth trends being experienced by the Caribbean region according to the Caribbean Tourism Organization (CTO). Belize indirect competitors in the region have also recently experienced growth in overnight tourism arrivals in 2017. The Bahamas showed increases of 2.7%, Barbados experienced growth of 13.9%, and Jamaica had growth of 2.1%. According to Ryan Skeete of the CTO, "We are delighted to report that Caribbean tourism reached another milestone in 2017, surpassing 30 million stay-over/tourist visits for the first time and reaching an estimated US \$37 billion in total visitor spending. This good news was despite the devastating September hurricanes. The performance in 2017 was primarily supported by sustained economic growth in all of our major source markets. Stay-over arrivals were on track for a strong performance during the first half of 2017, growing by an estimated 4.8%. However, there was a major slowdown in the second half performance due to the impact of the September hurricanes as tourist visits declined by 1.7%. These outcomes resulted in an overall increase of 1.7% to reach 30.1 million visits, marking the 8th consecutive year of growth, albeit slower than the average global growth rate of 6.7%. Therefore, the Caribbean market share of global visits in 2017 shrunk by 0.1 percentage points, to register 2.3% of the market. Among the destinations, tourist arrivals showed uneven growth. Several countries reported double-digit increases in 2017 such as Saint Lucia (11%), Belize (10.8%), and Bermuda (10.3%), while the hurricane-impacted countries recorded decreases ranging from -18% to -7%" (CTO State of the Industry Report, 2018).

These data show that tourism is a vital part of the Caribbean, and specifically Belize's economy, and continues to be the main foreign exchange earner. In 2013, total tourism expenditures in Belize was BZ\$749.8m. In 2017, Belize received approx. BZ\$794 million from tourism, which accounted for 41% of total exports (Table 4). Unlike tourism arrivals, visitor expenditure has not been growing at an exponential rate. The forecast from the WTTC is that this figure will increase to over BZ\$1.4Billion, accounting for over 50% of

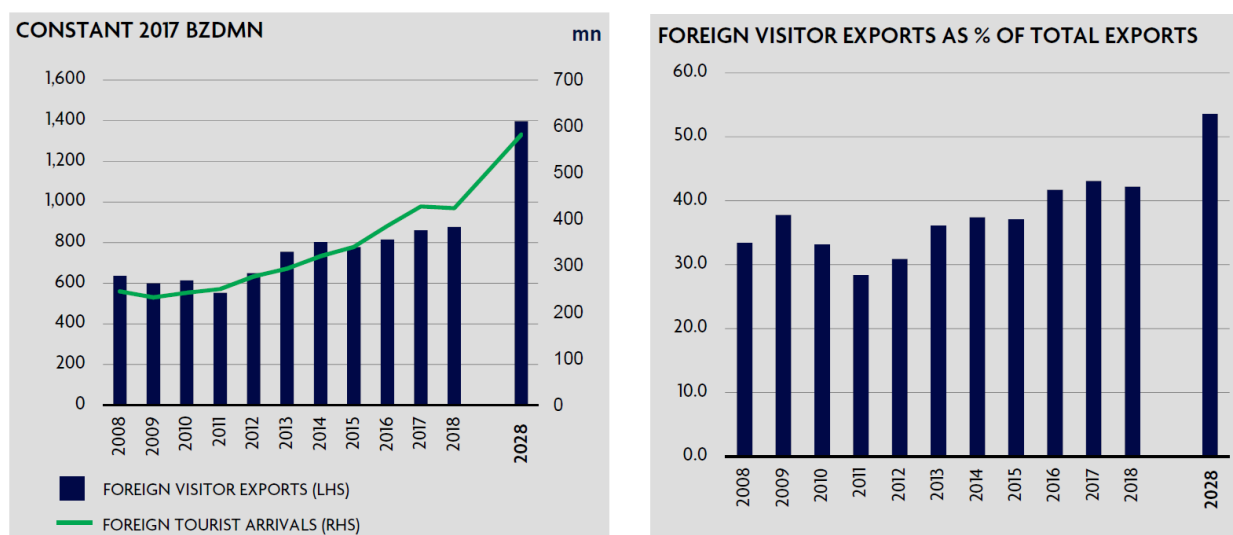
total exports in 2028 (Figure 6). The data consistently show that overnight visitors account for approximately 85% of this expenditure and 15% allocated to cruise passengers.

TABLE 3: TOTAL TOURISM EXPENDITURES IN BELIZE (IN BZ\$m) (BTB)

2013	2014	2015	2016	2017
749.8	768.9	770.9	819.6	794.9

FIGURE 6: TOURISM EXPENDITURES AS A PERCENTAGE OF TOTAL EXPORTS

BELIZE:VISITOR EXPORTS AND INTERNATIONAL TOURIST ARRIVALS



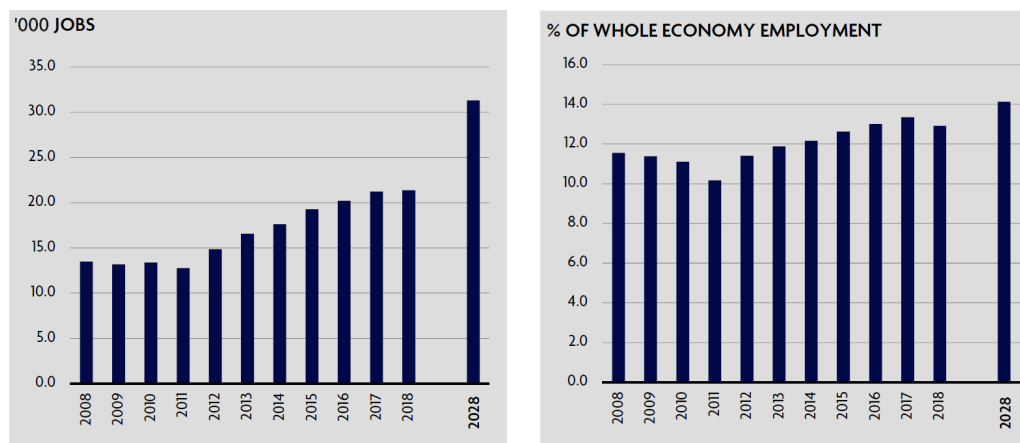
Source: WTTC World Economic Outlook, 2018

The total number of persons employed directly in tourism in 2015 was approximately 18,500 and aggregately was 34.8% of total employment or 48,500, a figure representing some 1 in 7 persons. In 2017, direct employment was 20,186, and total aggregate employment was 59,000 jobs or 37.3% of total employment. This employment figure is expected to rise to some 90,000 jobs by 2028 (2018 Belize Economic Impact Report, WTTC) (Figure 7). Without a doubt, these data indicate the importance of tourism to Belize's economy. Although Belize has other significant exports such as sugar (valued at BZ\$148m) and bananas (valued at BZ\$82m) in 2017 (SIB, 2018), the tourism product is one that maintains a promising competitive advantage in the global marketplace. The prospects for growth is promising as suggested by the WTTC. This foreign exchange earner (sic. tourism) is of vital importance given Belize's increasing foreign debt which is

currently estimated at 82% of GDP which has to be serviced some way or the other. As reflected above, the need for continuous economic growth and development is essential for the socio-economic health of the nation and its citizens.

FIGURE 7: TOTAL CONTRIBUTION OF TOURISM TO BELIZE’S GDP

BELIZE: DIRECT CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT



Source: WTTC World Economic Outlook Belize 2018

1.3 Institutional & Regulatory Framework

The Ministry of Tourism and Civil Aviation (MTCA), as of April 2018, is responsible for tourism in Belize. The Department of Civil Aviation- and three statutory agencies (the Belize Tourism Board-BTB, the Border Management Agency-BMA and the Belize Airports Authority-BAA) all fall under the responsibility of the MTCA. Unlike other government ministries, there is not an actual statute prescribing the legal mandate of the MTCA and its governing operations. Instead, there are several enabling legislative statutes including the National Tourism Act, the Belize Tourism Board Act, the Civil Aviation Authority Act and the Belize Airports Authority Regulations which govern and guide the work of the MTCA and the government department and various statutory agencies under its remit.

The MTCA’s strategic plan identifies the entity as “a government entity that provides leadership, strategic direction, good governance and oversight on all matters relating to the development of tourism and culture for and on behalf of the Government of Belize” (MTCCA, 2013, p. 7). Furthermore, the MTCA is expected to:

- “ensure that tax revenues are being efficiently utilized to support the national development plans and priorities as determined by the legislature;

- enhance transparency and accountability in the overall governance of the sectors it represents;
- facilitate and have oversight over the development of plans and policy and delivery of those;
- be responsible for the coordination, reporting and finance of agencies (under its remit);
- serve as the primary liaison between the public and private sectors and as a key facilitator with external agencies/partners for the overall development of tourism and culture in Belize; and
- be responsible for attending to all legal obligations/commitments, international conventions, agreements and other institutional arrangements on behalf of the Government of Belize” (MTCCA, *ibid*, p.7).

Core ministry responsibilities were listed as “governance and oversight”, “sector coordination/integration”, “policy development”, “physical planning”, “legal and regulatory framework”, “external relations”, “facilitation of trade and tourism investments”, “project development and coordination” and “protection of the broader public interests” (*ibid*. p. 8).

The MTCA’s oversight responsibilities as a public sector body are shared between the ministry itself and its subordinate entities (i.e. BTB, BAA and BMA).

The DCA is responsible for ensuring safety, promoting and overseeing the development of the aviation industry in Belize.

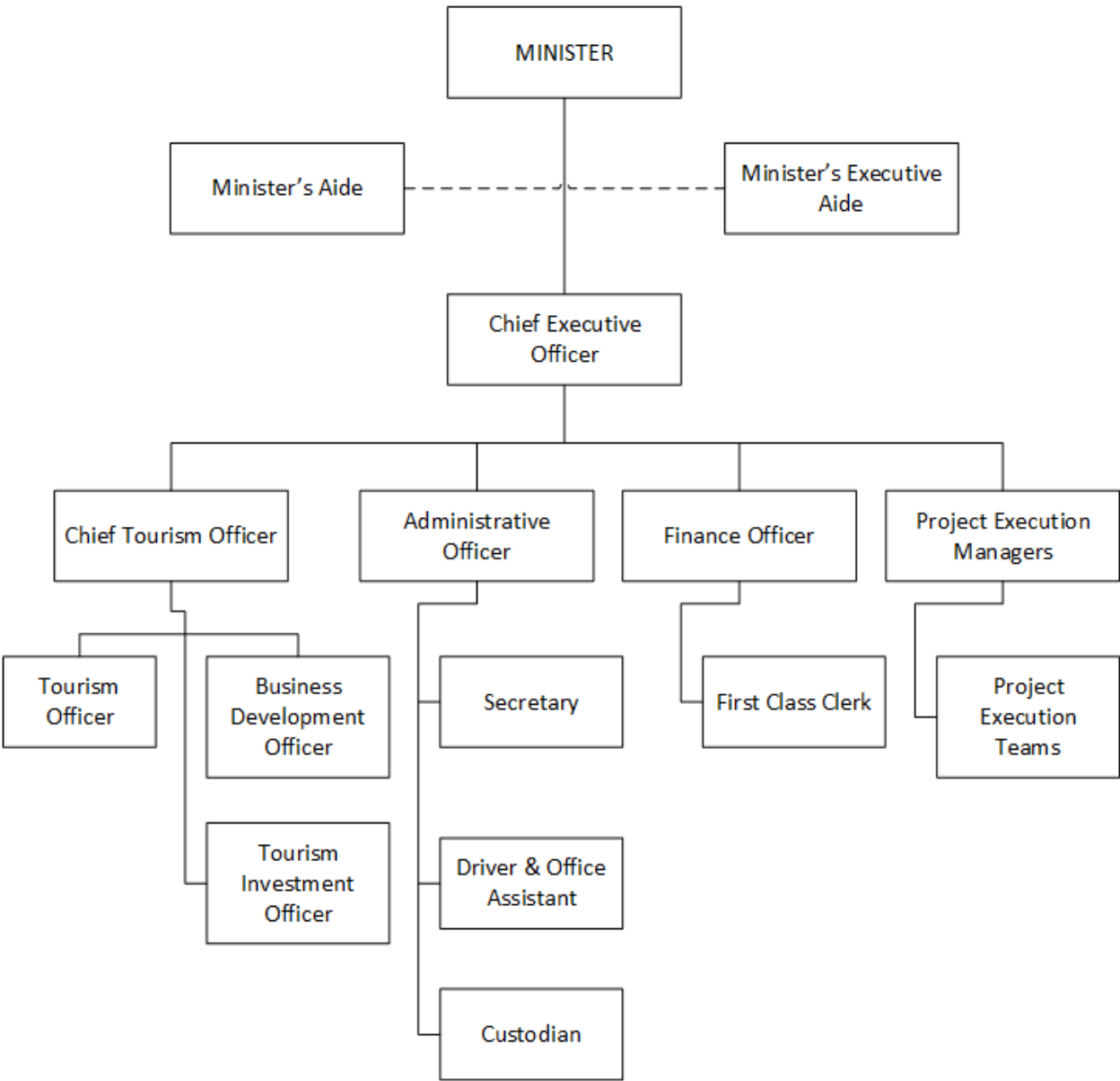
The BAA is responsible for the management, maintenance and administration of certified and prescribed airport facilities and aerodromes in the country.

The BTB is responsible for licensing (hotels and accommodations, tour operators, tour guides), revenue (taxes, fees and levies) collection, marketing, destination planning, and quality assurance within the national tourism sector.

The BMA, in turn, is responsible for the management and administration of Belize’s border facilities and their associated operational responsibilities including maintenance, security, emergency services and facility upgrades.

Figure 8 below is an organogram of the MTCA as of April 2018.

FIGURE 8: MINISTRY OF TOURISM AND CIVIL AVIATION



1.4 Institutional Framework of Tourism in Dangriga

Management and governance of tourism in Belize occur primarily at the macro level through the MTCA and BTB. At the local level, BTIA National along with its destination members and representatives are directly responsible for tourism management and promotions. Although local governments exist, such as town councils and village councils, these bodies do not have a clear mandate and authority to govern their tourism resources.

Town and city councils have a statutory duty to provide ‘rules and good governance’ and to provide certain basic services. Town and city councils’ responsibilities include maintenance of streets, drains, public parks, markets and cemeteries, and garbage collection. All urban councils must set up a utility coordination unit to oversee the activities of the bodies providing electricity, water and sewerage, gas, telephone and other utility services.

Similarly, village councils have responsibility for the maintenance of streets, drains and the sanitation of the village, and the maintenance of public parks, markets and cemeteries. They are tasked with encouraging and assisting cooperation on economic and social development and general welfare. They run community centres and assist residents in making representations to the government if there are problems with certain centrally administered services like school supplies, primary healthcare or the provision of agricultural extension services. They must also ensure that sound environmental practices are adhered to by all persons within the village⁸.

In respect to Dangriga Town, the district’s administrative capital, and commercial centre, there is a seven-member town council headed by a Mayor. Each member of the council has a portfolio that they are responsible for with one councillor responsible for tourism promotion. In general, though, the council has no direct authority with respect to tourism management and governance.

In addition to the village and town councils, there is a local chapter of the BTIA. Many tourism projects and activities are implemented or supported by the BTIA with the collaboration of local community stakeholders. The BTIA also acts as a lobbying body and promotes tourism activities and entrepreneurship not only to its members but also to the general public.

⁸ Belize Country Profile 2017–18

2. The Planning Context

2.1 Key Elements of the External Environment Scan

POLITICAL FACTORS

Belize's political environment can generally be considered stable. There has never been any civil uprising, and local and national election cycles usually have been free and fair, and free from violence. Also, there has always been a peaceful transition of power from one administration to the next. A stable political environment creates a favourable environment for private sector activity.

Belize's government structure is modelled from the British parliamentary model with a House of Representatives and a Senate. The Executive Branch is the Cabinet of Ministers, who are appointed from the government's majority. Given such a small society, Ministers of Government have significant power in the administration of the country.

Although there is political stability, corruption in public and private sector is a significant concern for the citizenry. As reported by BMI Research (Fitch Solutions), "corruption allegations and tensions with Guatemala will undermine the business environment." Corruption is a major perceptual issue in Belize's political environment, and it is not unusual to hear of bribery allegations. However, such challenges in the political environment are not deemed strong enough to alter the trajectory of the Belize tourism product.

Future governments will continue to view tourism favourably as a significant economic activity in the country. It is also safe to assume that future governments will continue to implement the National Sustainable Tourism Master Plan (NSTMP), which is the strategy document that provides policy guidelines for the development of tourism in Belize. Additionally, a National Tourism Policy for Belize (draft) was prepared in 2017 under the leadership of the Ministry of Tourism and Civil Aviation. The Policy sets out priorities and a direction for tourism in Belize for a ten-year period to 2028. Six key policy objectives have been identified to achieve these priorities: 1) Marketing and Market Access, 2) Product Development, Management and Conservation, 3) the Quality and Safety of the Visitor Experience, 4) Investment, Enterprise, Skills and Employment, 5) Destination Planning and Environmental Management, and 6) Stakeholder Engagement and Coordination. The NSTMP and the National Tourism Policy are strategic documents and, again, it is safe to assume that future governments will continue with the implementation of these national strategies for Belize.

Dangriga (part of the Southeast Coast) is one of “seven thriving unique tourism destinations that together converge in a cohesive offering to make Belize a distinctive and highly competitive destination” (NSTMP). The NSTMP suggested five different tourism products for South Eastern Coast Belize, of which Sun and Beach Tourism and Nautical Tourism are to 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. The Southeast Coast is seen as a distinctive destination that will be hosting a chain of mid to low-density sun and beach resorts, a chain of charming villages along with pristine and attractive beaches. This area will host mid-high end markets drawn by sun and beach, marine life and rainforest motivations; as well as it will become the central hub for nautical tourism development and the first to attract the pocket cruise market.

At the local level, Dangriga is governed by a Town Council that is in charge of overseeing the implementation of a Municipal Development Plan (MDP) for the municipality. The MDP is a long-term planning strategy to assist the Town Council in carrying out its municipal management responsibilities, respond to population and economic change, manage urban expansion, and provide the services required to ensure social, economic, functional and environmental cohesion and a good quality of life for residents of the community. One of the challenges that the MDP seeks to address is the lack of proper zoning, coupled with no enforcement of building codes, which has resulted in haphazard urban development and poor aesthetics. Dangriga has no area that can be considered a tourism zone or main town square where people can congregate and engage in positive recreation. This situation is exacerbated by the fact that the town is bordered in the north and south by private properties, which means that there is limited scope for the development of public recreation infrastructure along the coast.

In terms of the local political environment, the local political scene in Dangriga is peaceful and stable. The Dangriga Town Council (DTC) is made up of a Mayor and six councillors. Unlike the national political system where the voters cannot elect the Prime Minister directly, electors of the municipality can directly vote for their preferred Mayoral candidate. The town council is elected along party lines and relies heavily on the central government for subventions for infrastructural development works, even though the council generates substantial revenue via property taxes, vehicle licensing and registration, and liquor and trade licence fees.

Belize has over 140 registered non-governmental organizations (NGOs) which include a robust environmental lobby driven by international and domestic organizations, such as Oceana and the Coalition to Save our Natural Heritage. Two NGOs – the Belize Tourism

Industry Association and the Belize Hotel Association are focused primarily on the tourism sector. Another NGO, the Southern Environmental Association, co-manages two marine protected areas (MPA) off the southeastern coast – the Laughing Bird Caye National Park and the Gladden Spit Silk Cayes Marine Reserve. The Fisheries Department manages two other important MPAs in the area – the South Water Caye Marine Reserve and Glover’s Reef Marine Reserve.

ECONOMIC FACTORS

It is important to observe both international and domestic economic trends when assessing the external environment of the tourism sector; especially from Belize’s main target markets. Although there has been a strategy to diversify to markets in Europe and South America, the main market remains the North American market (i.e., the United States and Canada). Recently, the Belize Tourism Board has started to invest in reaching the Mexican market.

Tourism is also a luxury product and depends heavily on disposable income. The North American markets of the United States and Canada are the main markets for Belize accounting for some 70% of total visitors (BTB 2018). According to the publication Trading Economics, *“Disposable Personal Income in the United States increased to 14860.81 USD Billion in April from 14809.91 USD Billion in March of 2018. Disposable Personal Income in the United States averaged 5098.62 USD Billion from 1959 until 2018, reaching an all-time high of 14860.81 USD Billion in April of 2018 and a record low of 351.90 USD Billion in January of 1959.”* This growth in disposable income in Belize’s primary tourism market is a positive sign.

An option for tourism in Belize continues to be domestic tourism, especially in the “slow season”. This hinges on how well Belizeans are doing economically. Looking ahead, the Central Bank of Belize estimates that real GDP should grow between 1.5% and 2.0% in 2018. This is not exemplary growth. This expansion hinges on expectations that agricultural output will increase, the three-year decline in “Fishing” will be reversed, and tourism will continue to support broad-based growth in the tertiary sector.

Thus as a strategy, the target market of Belizeans travelling to destinations such as Dangriga will be minimal, except during Garifuna Settlement Day celebrations in November. The Stann Creek area (excluding Placencia) has the fourth highest average room rate at US\$274⁹. Only Ambergris Caye, Placencia and “Other Islands” have higher

⁹ Data specific to Dangriga was not available.

rates at US\$403, US\$355, and US\$295, respectively. The other six significant destinations in the country have much lower average room rates, which may be more within the budget of the average Belizean¹⁰. This means that, even if Stann Creek room rates are lowered, or special rates are offered for Belizean nationals, this area may still be beyond the reach of the local tourism market.

Another important consideration is the high unemployment rate in Dangriga, which is reflected in the labour force statistics for the Stann Creek District – 37.8% of the working-age population was not in the labour force, and 13.1% of the labour force was unemployed at April 2017¹¹. For various reasons, but principally because it is a cheap labour source, employers have tended to hire Central American immigrants over local Garifuna residents, thus creating the myth of the lazy local. This has contributed to a vicious cycle – a sense of hopelessness among the local population which has led to a massive youth migration from the destination because of perceived limited employment opportunities.

SOCIO-CULTURAL FACTORS

A main socio-cultural factor that has directly affected tourism nationally is the increase in crime in the country. In the Dangriga area, the incidence of crime has been increasing, particularly burglaries and the theft of property. There is a low occurrence of major crimes, such as sexual assaults and murder, compared to other destinations in the Southeast Coast.

Other socio-cultural factors that are important in the tourism industry include understanding local and global trends in consumer behaviour (Box 1), population and demographic changes, and other factors.

The Statistical Institute of Belize (SIB) estimates that Belize's population will reach 400,000 by the year 2020, still small by regional and international standards. The trend is that the number of foreign visitors will continue to be more than the population on an annual basis.

Changes in population demographics in Dangriga, caused by an exodus of young people from Dangriga in search for better opportunities elsewhere and other factors discussed in this section, can have an impact on the cultural tourism product. If young people are not

¹⁰ By comparison, Corozal has the lowest average room rate at US\$108, and Orange Walk second lowest at US\$157, followed closely by Caye Caulker at US\$164.

¹¹ Source: Abstract of Statistics 2016, Statistical Institute of Belize.

staying to continue the cultural traditions and practices, the cultural expression will be eroded over time.

Observations from stakeholders at the focus group sessions indicate that there is a growing perception that Belizean citizens in Dangriga are not embracing tourism-related employment opportunities. As a result, many external people who come into the destination in search of work, end up securing many of the jobs, such as tour guides, diving instructors, and resort and restaurant staff and managers. Because of a scarcity of skilled labour among the local workforce, some employers end up cutting corners and hiring low-skilled and unlicensed personnel, which then undermines the quality of the visitor experience.

Access to primary education exists and is affordable. It is a national law that every child attends elementary school, and thus it is the obligation of the state to make it accessible and affordable. Dangriga residents have access to primary, secondary and tertiary level education in the town. Like most high schools in the country, though, tourism training is minimal; however, tourism management is now being offered at the Stann Creek Ecumenical Junior College level. As of 2018, 155 students had graduated from the junior college's tourism training program; 50 students are currently employed in the sector. If a resident of Dangriga wishes to pursue University training (beyond an Associate's degree), the national options would be the University of Belize, Galen University and the University of the West Indies School for Continuing Studies.

The Southern Health Region (SHR) serves the two southern districts with a total estimated population of 61,000 persons (CSO 2007 estimate). The SHR is composed of two Public Hospitals, fourteen Health Centers and twelve Health Posts. The Southern Regional Hospital is located in Dangriga and has 52

BOX 1: CONSUMER BEHAVIOR TRENDS

Consumer Behaviour:

- Many locals are interested in local experiences and to become tourists in their own country.
- International visitors are interested in affordable, local experiences (e.g., AirBnB).
- There is growing interest in customized experiences among Millennials, who want to be able to make their own choices on their experiences.
- There is a growing trend on experiential travellers. These tourists are interested in experiencing a country, by connecting with its history, people and culture.
- Visitors want to be able to explore and try local cuisine.
- Trend towards responsible tourism.

beds. The hospital provides primary and secondary level care to the Southern Health Region of Belize (Stann Creek and Toledo Districts) in the following four basic specialties: Gynaecology, Surgical, Paediatric and Internal Medicine. In an effort to enhance coverage in the area of Mental Health, a new Acute Psychiatric Unit was opened, and a Voluntary and Counselling Testing Center (VCT) was established. The hospital is therefore theoretically relatively well suited to accommodate Dangriga. However, recently, there have been allegations of medical malpractice and poor attention at the hospital, when two patients died while in the care of the hospital during a one month period. A perception among the local residents, therefore, exists that the health care system is inadequate, and people have little confidence in the system.

Littering, including dirty streets and sidewalks, remains a constant problem in the municipalities, including Dangriga. This leads to the perception that Dangriga is a dirty place. This situation can be attributed to a need for greater civic pride among the residents and the need for better solid waste management at the municipal and district levels. A cleaner municipality, including well-designed parks and playgrounds, are vital parts of the tourism infrastructure.

Similarly, cultural expression activities – such as music festivals, culinary events, and cultural trails – are vital parts of the cultural tourism product. Much of these elements are already in existence in Dangriga, particularly during the November Garifuna cultural celebrations. Festival and events planning, as well as improved packaging and pricing, is required for the cultural assets of Dangriga to be better marketed to visitors.

TECHNOLOGICAL FACTORS

Technology is an essential factor in any industry, and the tourism industry is no exception. The assessment of technology for the destination takes the form of identifying how technology impacts the marketing and delivery of the product. As with all destinations, technological impact on the Dangriga tourism product includes the basic internet access, mobile telecommunications technology, POS machines and the portal to accept credit card payments, bank-to-bank same-day transfers, security cameras and software are all standard technological features that have been integrated into the tourism industry.

The Stann Creek District lacks in terms of frontline tourism training. The one institution with presence countrywide that offers skilled-based tourism training is the Institute for Technical and Vocational Education Training (ITVET). The ITVET does frontline training in Food Preparation, Hospitality Services, and Front Desk and these training are offered in certain areas of the country. An examination of tourism training in the Stann Creek

District reveals that there are only 15 students enrolled at the ITVET for frontline training. The other 200 students are enrolled in Junior College academic tourism programmes.

Reservations, inventory management, and Customer Management systems are driven by technology. Top technological influences include social media platforms, apps, interactive maps, improved transportation systems, and streaming services. The rise of the online marketplace and hospitality services that connects people looking to rent their homes with people who are looking for accommodation, e.g., Airbnb, is also quickly becoming the norm. The impact of technology on tourism in the Dangriga area is not occurring at the same pace as it is countrywide. However, it is expected that very soon Dangriga will have access to the national telecommunication company's high-speed internet services, Diginet, which provides fiber optic internet speeds for businesses of up to 130mps download speeds. This improvement will positively impact the delivery of the tourism product.

ENVIRONMENTAL FACTORS

Significant threats to tourism in Belize include hurricanes, tropical storms, and floods. It is vital for tourism destinations to implement disaster preparedness plans to be able to better plan for these types of natural events.

Human activity such as unregulated development can have a negative impact on the tourism product. Belize has an economy based on natural resources, with tourism creating a major economic justification for conservation. This fact is explicitly recognized in the overarching development strategy, Horizons 2030, which is operationalized in the Growth and Sustainable Development Strategy for Belize and National Sustainable Tourism Master Plan.

Another external environmental factor that affects tourism is the strategy to brand Belize's tourism as a Responsible Tourism destination. This requires that all developments in Belize should undergo a properly designed Environmental Impact Assessment (EIA). Any development in Belize legally requires an EIA; however, the quality and enforcement of EIAs have at times been brought into question by environmental NGOs.

Belize has approximately 26% of its territory classified as protected areas, which to a great extent form the basis of the national nature-based tourism product (e.g., the Blue Hole). The focus of protecting these natural assets will continue and is consistent with the push to Responsible Tourism. However, Belize has yet to capitalize on the fact that its Barrier Reef System (BBRS) has been declared a World Heritage Site (WHS) since the 1990s. A

well-designed marketing strategy focusing on the BBRS WHS could have major positive results for the growth of the overnight tourism sector.

GOB's announcement that the use of single-use plastic and Styrofoam will be banned by April 2019 puts Belize on the map and should be a significant boost to the tourism marketing strategies and the intended branding image of Belize as a responsible tourism destination. At the same time, tourism businesses will need to look for biodegradable packaging alternatives which could bring additional costs to products and services.

Dangriga, like other destinations within the Southeast Coast, is faced with a garbage issue. The town is not integrated into the national solid waste management program and consequently does not have any waste transfer station. A contract was signed in June 2018 for infrastructure work under the solid waste management project for the construction of a transfer station in Placencia and Punta Gorda, and the closure of dump sites in those two locations. The project, which will cost \$3.1 million Belize dollars, will also finance the construction of a garbage transfer station in Dangriga. In the meantime, the DTC has a municipal waste collection program in place. The town lacks a proper sewage system and relies on septic systems.

Other forms of environmental impacts include private dredging and sand mining in North Stann Creek which has impacted the river, pollution of the river due to run-off from nearby farms, and the gradual parcelling out of land in the Gra Gra Lagoon National Park, which currently has no management arrangement in place.

LEGAL FACTORS

The legal environment is closely linked with the political environment. For a destination, many laws are in effect. While laws in Belize are generally well written, the challenge lies in their effective, consistent and fair enforcement. For example, the business community has complained repeatedly that a level playing field does not exist, e.g., as it relates to charging and paying GST. Also, it is a known fact that most restaurants do not have a POS system or programmable cash registers, which may result in underpayment of tax revenues to the GOB.

Legislation affects travel and tourism. There are many laws that relate to travel and tourism. These include: 1) Immigration laws, 2) Environmental laws, 3) Building and construction laws; 4) Taxation; 5) Licensing requirements to conduct tourism business at the national and local level, and 6) Employment Laws (Box 2).

BOX 2: LAWS RELATED TO TOURISM

Laws related to Tourism:

- Immigration laws. Over the last couple of years, Belize has relaxed its visa requirements for countries such as Colombia. It was recently announced in 2018 that Mexicans from the State of Quintana Roo will no longer need a passport to visit Belize.
- Environmental laws are plentiful and speak to requirements to minimize environmental impact. Tourism developments require environmental impact assessments.
- The Central Building Authority and the Local Building Authority govern building and construction laws. Permits are required for construction that monitors safety, structure size, and building codes. What is lacking in construction is relevant zoning laws.
- Taxation covers all aspects of the tourism businesses. The Belize Tourism Board (BTB) manages the hotel taxes and the Central Government manages the Business Tax, the General Sales Tax, and Personal Income Tax.
- Licensing requirements to conduct tourism business at the national and local level exist. The BTB is responsible for issuing tourism licenses as they relate to hotel, tour guide, and tour operator operations.
- Employment Laws are enforced by the Labour Department. These laws govern minimum wage, working hours, hiring and termination practices, etc. These are especially relevant given the amount of foreigners needing work permits to work in the tourism industry.

New minimum standards regulations for Hotels and Accommodations will be enacted by 2018/19. The new application requirements are quite onerous, particularly as they relate to the need for permits from various GOB departments such as the Department of the Environment and the Fire Department, etc.

OTHER MAJOR ISSUES IDENTIFIED

- Of twelve major destinations in Belize, Stann Creek (excluding Placencia) ranks in the middle tier of most national tourism indicators: 35.5% hotel occupancy rate (5th highest), fifth in the country in a number of hotels and sixth in hotel room stock, and 59,665 overnight visitors (sixth highest).¹²

¹² 2017 Tourism Indicators (BTB). Dangriga data is combined with other destinations within Stann Creek District excluding Placencia.

- Due to the poor state of the economy and high commercial lending rates (9.6% as at 31 December 2017 est.), there is little local investment in tourism in Dangriga Town.
- Increasing prices of fuel, utilities, rent and lower wages are driving up the cost of living and cost of doing business.
- While the southern regional hospital is based in Dangriga, there is still a great need for improving the quality of medical care and services.
- More than any other economic activity, the success or failure of a tourism destination depends on being able to provide a safe and secure environment for visitors. Properties have not conducted proper risk assessments to determine how to ensure better safety and security to their guests, which is a vital pillar of tourism.
- Natural events (such as tropical storms and hurricanes) can damage or severely set back the main tourism products via wind damage, floods, destruction of the road network and electrical grid.

3. The Southeast Coast Tourism Market

3.1 Southeast Coast Tourism Trends

The Southeast Coast of Belize includes the Placencia Peninsula and a coastline that is one of the most highly sensitive natural ecosystems within Belize. This area includes established destinations such as Placencia and Hopkins, emerging destinations such as Dangriga, and what the NSTMP refers to as a “new development area” between Riversdale and Hopkins. Popular protected areas such as the Cockscomb Basin Wildlife Sanctuary (a.k.a. Jaguar Reserve), Victoria Peak Natural Monument, and St. Herman’s Blue Hole National Park are located within this destination. The Placencia Peninsula includes Placencia Village, Seine Bight, and Maya Beach communities.

With 122,718 overnight visitors recorded in 2017, the Southeast Coast of Belize is the third most visited destination in the country. Only Ambergris Caye and Caye Caulker registered higher visitor numbers, with 181,443 and 140,223, respectively.

TABLE 4: STANN CREEK ANNUAL VISITATION STATISTICS¹³

2015	2016	2017	% CHANGE '17 VS '16
Dangriga/Stann Creek¹⁴			
41,393	46,516	59,665	+28.3%
Placencia			
47,144	50,774	63,053	+24.2%
Totals			
88,537	97,290	122,718	+26.1%

Table 4 above shows the overnight arrivals in the Southeast Coast of Belize for the years 2015, 2016 and 2017. Statistics from the Belize Tourism Board (BTB) show arrival information for Placencia and the rest of the Stann Creek District (including Dangriga, Hopkins and Riversdale). Overnight arrivals surpassed 100,000 for the first time in 2017, with a 26.1% increase over 2016. This represents the highest percentage increase in the

¹³ Visits to Destination represent overnight arrivals (Source: Belize Tourism Board)

¹⁴ Hopkins is grouped with Stann Creek. The assumption is that the increase in visitors is being driven primarily by what is occurring in Hopkins.

country, with the exception of Belmopan which is probably an outlier. Last year, the tourism hubs of the country, Ambergris Caye and Caye Caulker, experienced only an 11.6% and 11.3% increase, respectively, over the previous year. This is a clear indicator of an explosive attractiveness and growth of tourism in the Southeast Coast area.

The Southeast Coast has a high percentage of Belize's total tourism activities. The overnight sector is vital for the Belize tourism product given that expenditure from this sector is more and has a more significant impact. A key indicator for this sector is the accommodation industry. The Southeast Coast has one of the highest rates of hotel and room stock in the country. In 2015, Belize had a total supply of 850 hotels with a room stock of 7,619. In 2017, the supply of hotels increased to 856 with a total room stock of 8,177. In 2015, the Southeast Coast had 247 hotels with 1,491 rooms. In 2017, the hotel stock in the destination decreased slightly to 239, but room stock increased to 1,638 (Table 5 and Table 6). These figures represent a 3% decrease in the hotel stock but a 10% increase in the room stock in the Southeast Coast destination.

In Dangriga, the supply of hotels was 19 and room stock was 180 in 2017. This is 2.2% on national hotel supply and 2.2% of national room stock, respectively. Within the Southeast Coast, Dangriga had only 8% of hotel stock and 11% of room stock in 2017. Within the "Rest of Stann Creek" (which includes Dangriga but excludes Placencia), Dangriga had 22.1% of hotel stock and 28% of room stock. Dangriga, therefore, can be considered an emerging destination within the Southeast Coast. The full impact of online marketplaces and hospitality services, such as Airbnb which facilitates accommodation rentals by owners, has not been determined. Airbnb facilitates the renting out of owners' spare bedrooms, guest houses, and apartments.

TABLE 5: TOTAL NUMBER OF HOTELS IN BELIZE & SOUTHEAST COAST¹⁵

DESTINATION		YEAR/% OF NATIONAL					
		2015		2016		2017	
Belize – national		850		864		856	
Southeast Coast (Placencia Peninsula and Stann Creek/Dangriga/Hopkins)		247	29.1%	249	28.8%	239	28.0%
	Placencia Peninsula: Placencia Village, Seine Bight, Maya Beach	156	18.4%	155	17.9%	153	17.9%
	Other destinations in Stann Creek: mainly Hopkins and Riversdale	91	10.7%	94	10.9%	86	10.1%
	Dangriga					19	2.2%
Ambergris Caye		172	20.2%	171	19.8%	169	19.7%
Cayo		125	14.7%	138	16.0%	137	16.0%

TABLE 6: TOTAL NUMBER OF ROOMS IN BELIZE & SOUTHEAST COAST

DESTINATION		YEAR/% OF NATIONAL					
		2015		2016		2017	
Belize – national		7,619		8,282		8,177	
Southeast Coast (Placencia Peninsula and Stann Creek/Dangriga/Hopkins)		1,491	19.6%	1,677	20.3%	1,638	20.0%
	Placencia	842	11.1%	976	11.8%	993	12.1%
	Other destinations in Stann Creek: mainly Hopkins and Riversdale	649	8.5%	701	8.5%	645	7.9%
	Dangriga					180	2.2%
Ambergris Caye		1,898	24.9%	2,237	27.0%	2,086	25.5%
Cayo		1,174	15.4%	1,247	15.1%	1,275	15.6%

¹⁵ 2017 Tourism Indicators (BTB)

A measurement of hotel performance is occupancy rates. In 2017, the “Rest of Stann Creek” (which includes Dangriga) represented the fifth highest in relation to Belize’s hotel stock; but sixth in room stock. Its occupancy rates are lower than the national average. Belize’s average occupancy rate in 2016 was 37% and in 2017 was 39%. This is skewed heavily by higher occupancy rates in Ambergris Caye. The occupancy rates for the “Rest of Stann Creek” has steadily decreased. In 2015 occupancy was at 47% and in 2016 there was a drop to 41.9% and a further drop to 35.5% in 2017 (Table 7). Possible explanations for this decrease in hotel occupancy over the past two years may be the increasing popularity of the sharing economy accommodation options such as increase listing of homes and rooms on Airbnb and VRBO and/or the under-reporting of hotel activities to the BTB.

TABLE 7: HOTEL OCCUPANCY RATES (BTB)

Destination	2015	2016	2017
Belize – national	42.8	37	39
<i>Placencia</i>	<i>57.7</i>	<i>33.2</i>	<i>31.7</i>
<i>Rest of Stann Creek</i>	<i>47.0</i>	<i>41.9</i>	<i>35.5</i>
Ambergris Caye	50.3	42	45.1
Cayo	19.4	22.1	34

3.1.1 Overnight Sector

The Southeast Coast is one of the top three overnight destinations in the country. In examining the Southeast Coast’s market share for the overnight sector, data for Placencia and the “Rest of Stann Creek” (including Dangriga) will be examined.

Placencia’s average room rate (ARR) is less than Ambergris Caye’s (a destination which Placencia is often compared with). In 2016, Placencia ARR was \$372 and fell to \$355 in 2017. By comparison, Ambergris Caye’s ARR was \$422 in 2016 and \$403 in 2017. The “Rest of Stann Creek’s” ARR was US\$282 in 2016 and US\$274 in 2017, which is less than ARR for Placencia.

In terms of average daily expenditure, overnight visitors from the USA to Placencia reduced their spending in 2017 compared to 2016, while the reverse happened in other parts of Stann Creek, including Hopkins and Dangriga. US visitors to Placencia spent on average US\$180.19 in 2016 and US\$177.63 in 2017, a 1.4% decrease (Table 9).

The average daily expenditure by overnight US visitors in the Rest of Stann Creek increased in 2017 compared to 2016. US visitors to other parts of Stann Creek spent on average US\$178.38 in 2016 and US\$196.49 in 2017, a 10.2% increase (Table 8).

TABLE 8: AVERAGE DAILY EXPENDITURE (\$US), 2016 AND 2017¹⁶

Destination (2016)	USA	Canada	Europe	Caribbean	Central America	Other	Regional Average
	\$	\$	\$	\$	\$	\$	\$
Hopkins/Dangriga/SC	178.38	122.16	72.05	166.67	25.00	89.58	162.72
Placencia	180.19	150.74	80.33	166.67	137.50	68.30	167.90

Destination (2017)	USA	Canada	Europe	Caribbean	Central America	Other	Regional Average
	\$	\$	\$	\$	\$	\$	\$
Hopkins/Dangriga/SC	196.49	113.46	97.57	-	-	77.16	175.21
Placencia	177.63	154.17	123.74	-	59.72	122.25	168.19

These expenditures are based on a national average length of stay (LOS) of 6.18 nights in 2016 and 5.77 nights in 2017 (Table 9). LOS data was not available for the Dangriga/Stann Creek and Placencia areas.

TABLE 9: AVERAGE LENGTH OF STAY (NIGHTS) – NATIONAL

PURPOSE OF VISIT/ SEASON	SUMMER			WINTER			AVERAGE		
	2015	2016	2017	2015	2016	2017	2015	2016	2017
Holiday, leisure	6.23	5.96	5.60	6.82	6.24	5.75	6.53	6.08	5.67
Business	4.85	3.79	3.99	4.38	3.78	3.84	4.66	3.79	3.94
Visit Friends	8.18	8.36	7.79	8.59	8.12	8.09	8.37	8.26	7.91
Religion	7.33	7.32	6.80	7.72	7.41	6.97	7.52	7.35	6.87

¹⁶ Source: Statistical Institute of Belize via BTB

PURPOSE OF VISIT/ SEASON	SUMMER			WINTER			AVERAGE		
DK/NS	7.00	0.00	6.00	6.33	5.50	6.00	6.60	5.50	6.00
Other	5.58	6.11	4.98	6.74	5.61	5.04	6.08	5.92	5.00
Average	6.31	6.09	5.70	6.85	6.30	5.85	6.58	6.18	5.77

The Southeast Coast is clearly experiencing unprecedented tourism growth as is seen by the arrival and spending numbers. This tourism growth has stimulated an increase in employment. In 2016, 3,996 people were employed within the tourism industry, while 4,288 persons were employed in 2017, an 8.1% increase (Table 10).

Nationally, 20,722 people were employed in the tourism industry in 2017¹⁷. This means that the Southeast Coast (Dangriga/Stann Creek and Placencia) accounted for 20.7% of tourism-related jobs in the country in 2017. Only the Belize District (which includes Ambergris Caye and Caye Caulker) surpassed this percentage. This bodes well for the development of additional tourism products that will benefit under-served rural communities in the Stann Creek District.

It is important to note, however, that more men than women are employed in the tourism industry. Table 10 shows that 59.3% more men than women were employed in 2016, and 62.9% more men than women in 2017. This disparity is similar to most of the other destinations in the country. New tourism initiatives should take this disparity into account to ensure that in the future there is more gender balance in tourism hiring practices.

¹⁷ SIB via BTB

TABLE 10: ACTIVE INSURED PERSONS WITHIN THE TOURISM INDUSTRY – STANN CREEK¹⁸

Tourism Industry	TOTALS		FEMALE		MALE	
	2016	2017p	2016	2017p	2016	2017p
GRAND TOTAL	3,996	4288	1,541	1,631	2,455	2,657
Accommodations for visitors	2,635	2,905	892	1,003	1,743	1,902
Food and beverage serving activities	712	711	485	484	227	227
Transport	117	116	8	8	109	108
Transport Equipment Rental	23	1	6	1	17	0
Travel Agencies	274	25	91	2	183	23
Cultural Activities	188	451	41	102	147	349
Sports and Recreational Activities	47	79	18	31	29	48

¹⁸ SIB via BTB.

3.1.2 Tourism training

The Stann Creek District (including Placencia) is also lacking in terms of frontline tourism training. The one institution with presence countrywide that offers skilled-based tourism training is the Institute for Technical and Vocational Education Training (ITVET). The ITVET does frontline training in Food Preparation, Hospitality Services, and Front Desk and these training are offered in certain areas of the country. An examination of tourism training in the Stann Creek District reveals that there are only 15 students enrolled at the ITVET for frontline training. The other 200 students are enrolled in Junior College academic tourism programmes (Table 11).

TABLE 11: INSTITUTIONAL TOURISM TRAINING IN BELIZE 2018

Institution	Graduates	Current Enrollment	Internship
ITVET		155	
Belize City	n/a	17	YES
Corozal	n/a	16	YES
Toledo	n/a	49	YES
Stann Creek	n/a	15	YES
Cayo	n/a	54	YES
Stann Creek Ecumenical JC	155	50	YES
Sacred Heart Junior College	290	112	
San Pedro JC	125	23	YES
St. John's Junior College	105	63	YES
Corozal Junior College	56	35	YES
Independence Junior College			
Business with Tourism		36	YES
Tourism		38	YES
Centro Escolar JC	n/a	n/a	n/a
Galen University	25	n/a	YES
University of Belize			
Associates	144	134	YES
Bachelors	199	60	YES
Total			
Associates	875	491	
Bachelors	224	60	

3.1.3 Cruise Sector

Belize has had cruise tourism for a number of years with the only port of call being Belize City. Many cruise passengers would disembark and proceed on local organised tours. A few would venture in the Fort Street Tourism Village and into Belize City for tours and walking sightseeing. This changed in 2016 when Norwegian Cruise Lines (NCL) opened the doors at Harvest Caye. Although the NSTMP proposed pocket tourism for the

Southeast Coast, policy makers decided it made economic sense to approve a mass cruise line to operate off the Southeast Coast. NCL is thus operating a private island, Harvest Caye, for cruise passengers, very similar to the model used by Disney Cruise Lines at its Castaway Island destination in the Bahamas. Harvest Caye is an all-inclusive operation that allows direct berthing of the ships for disembarking on the island.

Cruise tourism arrivals more than doubled overnight visitors in 2017, with 267,075 cruise passengers arriving on 84 port calls to Harvest Caye in that year (Table 12).

TABLE 12: HARVEST CAYE CRUISE ARRIVALS (PASSENGERS) ¹⁹

Month	Arrivals	Port Calls
January	35,193	12
February	26,060	10
March	36,690	13
April	33,530	13
May	10,031	2
June	10,311	2
July	10,341	2
August	5,173	1
September	14,181	3
October	26,557	7
November	28,702	8
December	30,306	11
TOTALS	267,075	84

While not all cruise passengers venture outside of the Harvest Caye Cruise Port, many do visit the Southeast Coast, including the Placencia Peninsula and the mainland, to participate on tours.

Cruise passengers disembark and come on shore to participate in a number of tourism activities. Daily average spend of Harvest Caye cruise passengers is not available.

¹⁹ Source: BTB

However, based on a 2015 report prepared for the Florida-Caribbean Cruise Association, passenger cruise parties spent an average of US\$163.52. Spread over the cruise parties that visited Belize, this represented an average of US\$15.77 per party. On a per passenger basis, the average total expenditure was US\$77.87.²⁰

While activity data for Harvest Caye cruise passengers are not available, data does exist for Fort Point Tourism Village (FSTV) cruise passengers. This gives an idea of the type of activities that cruise passengers prefer. The Top 10 activities in 2017 of FSTV cruise passengers is shown below, along with the percentage of passengers who sign up for each activity.

- Mayan temple visit = 26.3%
- Cave tubing = 21.4%
- City tour = 19.7%
- Snorkeling = 11.5%
- Swimming = 7.8%
- Wildlife watching = 5.9%
- Airboat ride = 3.3%
- Jungle ATV = 1.5%
- Horseback riding = 1.4%
- Kayaking = 1.2%

3.2 Dangriga Tour Operators

Tour operators play an essential role in the packaging, distribution and sales of tourism products. They function as intermediaries between suppliers and consumers. Tour operators are therefore important strategic partners for tourism development. As of 2017, there were twelve (12) BTB registered tour operators from Dangriga. These inbound tour operators offer a variety of marine and terrestrial tours as shown in Table 13. In a review of the tour operators' websites, it was observed that five (5) operators provide only terrestrial tour offerings, four (4) provide only marine tour offerings, while three (3) provide a combination of terrestrial and marine tour offerings. Several of the operators, while registered, appear to subcontract tours to other tour operators that conduct the tours.

²⁰ Source: Economic Contribution of Cruise Tourism to the Destination Economies: A Survey-Based Analysis of the Impacts of Passenger, Crew and Cruise Line Spending Volume II Destination Reports, BREA. October 2015.

For the marine offerings, popular dive and snorkelling sites offshore Dangriga are used, some of which have some connection to the Belize Barrier Reef and others are located around small island resorts. In terms of the terrestrial tours, popular sites used are Mayflower Bocawina National Park and Cockscomb Basin Wildlife Sanctuary which are within close proximity to Dangriga. However, many terrestrial tours offer extend to other districts, in particular, those that involve archaeological sites and caving. Table 13 lists the types of tour offerings in the destination.

TABLE 13: TYPES OF TOUR OFFERINGS

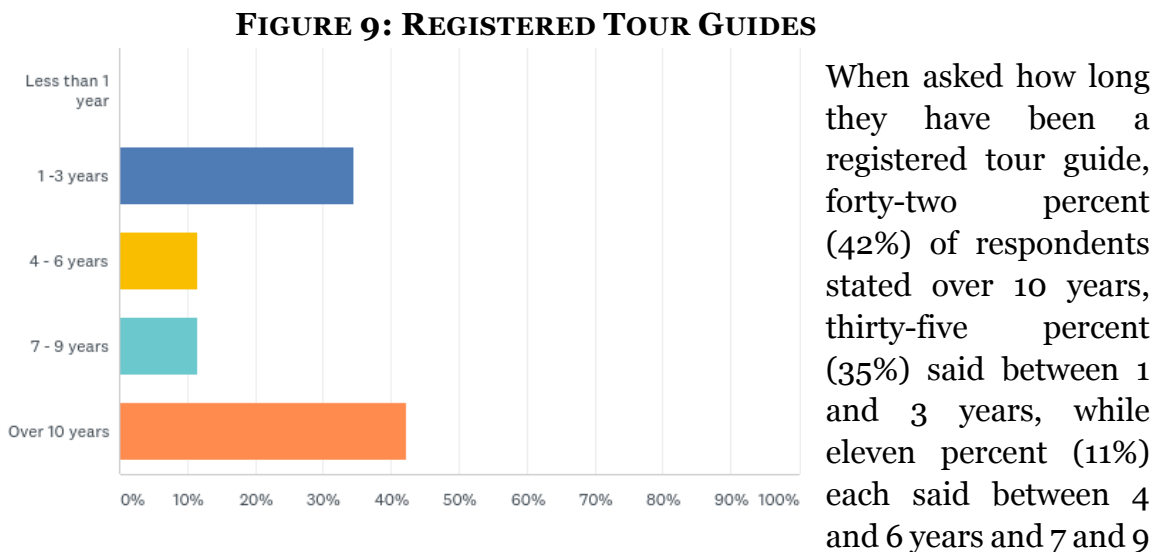
Marine	Terrestrial
Diving	Jungle Tour
Snorkelling	Rappelling
Sport fishing	Zip-lining
Fishing	Caving
Sailing	Birding
	Wildlife
	River Excursions
	Maya Archaeological Tour
	Culture Emersion
	Gastronomy

3.3 Stann Creek Tour Guides

An online survey of licensed tour guides who are residents from the Stann Creek District (that includes the Dangriga Destination) was conducted in order to ascertain basic information about their status and characteristics. This survey was done using convenience sampling which involved obtaining information from BTB's database of registered tour guides. An online survey was sent to registered tour guides who had an email address. Of the 147 licensed Stann Creek tour guides, responses were received from 26 (18%)²¹. The majority (38%) of the respondents were from Hopkins followed by others

²¹ While the response rate for online surveys is 30%, some research indicate that 10-20% response rate is reasonable.

who resided in various locations (30%) in the district, then Stann Creek Valley (11.5%), South Stann Creek (11.5%), and Dangriga (8%). Below are the results of the survey.



Of these respondents, fifty-four percent (54%) indicated that they work as full-time tour guides while forty-six percent (46%) work as part-time guides. For those respondents who indicated that they worked as part-time guides, the majority (58%) worked one week per month, while twenty-five percent (25%) worked two weeks per month and the remaining seventeen percent (17%) worked two weeks per month.

When asked if they conducted most of their guiding in the Stann Creek District, sixty-five (65%) of respondents said yes. Of the respondents that said no (35%), half (50%) conducted their guiding in the Belize District, while twenty-five percent (25%) each conducted their guiding in the Cayo and Toledo districts respectively.

In classifying their principal guiding expertise, forty-one percent (41%) of respondents indicated that they are Marine guides.

Seventeen (17%) said they were Culture/Heritage/ Archaeological guides, while the remainder said they were Adventure guides (12%), Birding guides (12%), Multiple expertise (12%), and Nature guide (6%).

FIGURE 10: TOUR GUIDE SKILL SET

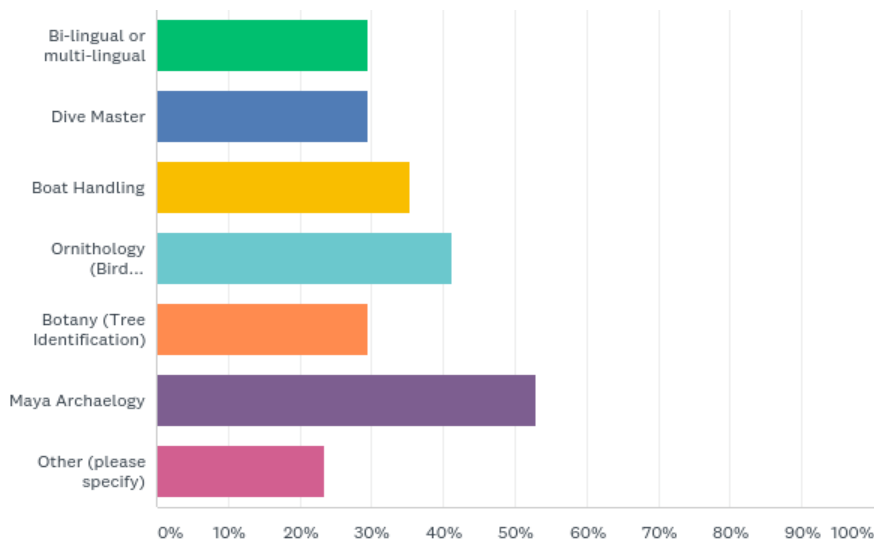


Figure 10 shows the tourism skill set that respondents claim.

Just over half (53%) indicated having skills in Archaeology followed by Ornithology (41%). Other significant skills included Boat Handling (35%), Dive Master (29%), Botany (29%), and being Bi-lingual/multilingual (29%).

As it relates to language, all of the respondents indicated their ability to conduct guiding in English while forty-seven percent (47%) said they could also conduct guiding in Spanish. Other languages (17%) that respondents had a good working knowledge of and can guide in are Garifuna and Mopan Maya.

Respondents were asked to rank the customer types that represent their highest number of customers. The top-ranked customer type was overnight visitors at seventy-one percent (71%) followed by cruise ship visitors at twenty-nine percent (29%). Finally, respondents indicated that most (59%) of the guiding that is done is through tour operators while the remaining guiding work, thirty-six percent (39%) is through freelancing. It is important to note that tour guides are prohibited from providing guiding services directly to visitors; the service must be provided through a licensed tour operator. With this said, tourism stakeholders informed that in freelancing, tour guides might be working for multiple tour operators who do not consider the staff. However, anecdotal information also indicates that many tour guides are independently conducting tours.

3.4 Main Competitors, Needs of Target Markets

Belize has many destinations, and a visitor can choose from diverse experiences. The main tourist destinations in the country are Ambergris Caye, Placencia (Southeast Coast), Caye Caulker, and the Cayo District. Emerging destinations are Toledo and Corozal – each positioning a unique brand of tourism. The main tourism assets in the coastal areas (such as Ambergris Caye and Placencia) are marine, and the main assets for the terrestrial

destinations (Orange Walk and Cayo) are the subtropical forests, archaeological sites, and caves. These different destinations do compete for visitor attention and dollars under the

Table 14: CPM CRITICAL SUCCESS FACTORS

Critical Success Factor	Description: The destination has...
Natural and cultural tourism assets	Natural and cultural tourism activities and attractions that are readily accessible or available.
System for monitoring tourism activities	Systems to monitor impacts and activities from visitor uses.
Marketing strategies	Strategies to market the tourism product in order to maintain and expand market share.
Zoning laws and regulations	Zoning systems to prevent over-crowding, noise pollution, etc.
Safety and security systems	Systems to ensure the safety and security of visitors.
Health care access	Access to the hospital and clinic facilities, and emergency medical care.
A system to monitor visitor satisfaction	Systems for monitoring and enhancing guest satisfaction.
Access to tourism assets	A diverse set of tourism assets that are readily accessible.
Quality of ancillary services	Services such as electricity, communication, etc., to complement tourism activities.
Has tourism management group	A destination management structure, whether formal or informal, to ensure proper tourism development.
Brand strength	A visible and recognizable brand that sets it apart from other destinations.
Sustainability considered in its actions	Tourism operations that are managed in an environmentally responsible manner and practice corporate social responsibility.

destination management and competitiveness.

country's national brand. However at a national level, the aim is to establish a system of cooperation in which destinations are identifying and developing differentiated yet complementary experiences. This approach helps to distribute visitors and expenditures.

We used the Competitive Profile Matrix (CPM) ²² to better understand the positioning of each of the main destinations in the Southeast Coast. This assessment helped us to benchmark Dangriga's position in the context of the two other major destinations--Placencia and Hopkins in this region. Placencia and Hopkins were selected because of their proximity and similarity in product offerings.²³

The CPM analyzes 12 critical success factors (see Table 14) that are internationally recognized as vital to

²² Adapted from the Competitive Profile Matrix, Strategic Management-Concepts and Cases, David, Fred; David, Forest, 16th edition, 2017. The Competitive Profile Matrix (CPM) identifies a destination's major competitors and its particular strengths and weaknesses in relation to the destination's strategic position. Critical success factors in a CPM include both internal and external issues; therefore, the ratings refer to strengths and weaknesses, where 4 = major strength, 3 = minor strength, 2 = minor weakness, and 1 = major weakness. In a CPM, the ratings and total weighted scores for competing destinations can be compared to the target destination. This comparative analysis provides important internal strategic information. The aim with the scores is to assimilate and evaluate information in a meaningful way that aids in decision making.

²³ Ambergris Caye and Placencia are the two most visited coastal destinations and Hopkins is vying for that same market.

These factors were selected based on the stakeholder findings in the assessment phase of the report. These factors also emerged in stakeholder interviews, PESTEL analysis, and SCOT analysis. Each of these factors was weighted to indicate their level of importance to the management of the destination. The weights applied to all destinations. Each factor is then given a rating to indicate whether that particular factor (for the particular destination) is:

1. Major weakness
2. Minor weakness
3. Minor strength
4. Major strength

Among the three Belizean destinations assessed (Table 15), Dangriga has the lowest competitive position; it is the least developed tourism destination compared to Hopkins and Placencia.

Even so, Dangriga scored particularly well in the areas of its Natural and Cultural Tourism assets (although it scored lowest on access to these assets), as well as on health care access, and safety and security systems.

While Dangriga is located very close to the marine assets and is known as the Cultural Capital of Belize due to its dominant Garifuna culture, tourism support infrastructure is poor and limited cultural activities occur, unlike in Hopkins.

The asset listing (Appendix 2) shows the vast amount of natural and cultural assets located within and near the destination.

Dangriga is dealing with early-stage tourism development issues. Besides having limited or poor access to tourism assets, limited development of cultural experiences, the destination struggles with marketing, systems to monitor visitor satisfaction, brand strength, sustainable management of current tourism operations, and a destination management structure. Given the benchmarking results, these are areas where strategies will need to be developed in order to improve Dangriga and the Stann Creek District's overall competitiveness position within Belize and the Southeast Coast.

The NSTMP envisioned the Southeast Coast as one of the major tourism destinations of Belize. This suggests that there should be a focus on integrating Placencia, Dangriga and Hopkins as one destination taking advantage of the specific strengths and tourism assets of each area.

TABLE 15: COMPETITIVE PROFILE MATRIX (DANGRIGA)

	<u>Dangriga</u>			<u>Placencia</u>		<u>Hopkins</u>	
Critical Success Factors	Weight	Rating	Score	Rating	Score	Rating	Score
Natural and Cultural Tourism	0.15	4	0.60	3	0.45	4	0.60
System for Monitoring	0.15	1	0.15	1	0.15	1	0.15
Marketing Strategies	0.08	1	0.08	3	0.24	2	0.16
Zoning Laws and Regulations	0.05	1	0.05	1	0.05	1	0.05
Safety and Security Systems	0.10	3	0.30	3	0.30	1	0.10
Health Care Access	0.10	3	0.30	1	0.10	1	0.10
System to Monitor Visitor	0.05	1	0.05	3	0.15	2	0.10
Access to Tourism Assets	0.08	2	0.16	3	0.24	4	0.32
Quality of Ancillary Services	0.08	3	0.24	3	0.24	3	0.24
Has Tourism Management	0.05	1	0.05	3	0.15	2	0.10
Brand Strength	0.06	1	0.06	4	0.24	3	0.18
Sustainability considered in its	0.05	1	0.05	2	0.10	3	0.15
Totals	1.00		2.09		2.41		2.25

3.5 Profile of Southeast Tourism Product

Of Belize's six districts, Stann Creek is the second smallest with a total area of 840 square miles. The district currently has a total population of some 41,032 individuals of which approximately 10,217 live in the main urban town of Dangriga, considered to be the "culture capital" because of the concentration of the Garifuna people and the lively culture that is still represented today. The SIB reports the other 30,816 residents live in rural areas. The main economic activities in the Stann Creek district focus on agriculture, primarily citrus and banana cultivation. But as is a trend countrywide, tourism is playing a significant role in emerging economic activities.

In general terms, the National Sustainable Tourism Master Plan (NSTMP) tries to obtain a better balance developing all the tourism destinations in Belize according to the potential of the different product offerings. The Southeast Coast is identified as one of "seven thriving unique tourism destinations that together converge in a cohesive offering to make Belize a distinctive and highly competitive destination"²⁴.

Unlike Ambergris Caye, the Southeast Coast coastline 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

²⁴ Source: NSTMP

require mitigation of environmental conditions and potential destruction of mangrove areas.

Stann Creek District has two main tourism hubs--Hopkins Village and Placencia Village, and an emerging destination, Dangriga. Hopkins is relatively young but experiencing steady growth in the development of the tourism product and Placencia is more mature and growing at a rapid pace. On the other hand, Dangriga is lagging in tourism development.

Key takeaways about Dangriga as a tourism destination are outlined below:

Tourism Assets:

- It contains all the features of a destination focused on Sun and Beach Tourism, Nautical Tourism, Culture Tourism, and Ecotourism and Adventure Tourism. The destination has a beach, a vibrant Garifuna culture, fishing tradition and is a gateway to several key marine and terrestrial attractions.
- It provides easy access to some of the beautiful cayes of the south and has easy access to some of the key terrestrial protected areas such as the St Herman's Blue Hole National Park, Five Blues Lake National Park, Billy Barquedier National Park, and Cockscomb Basin Wildlife Sanctuary/Victoria Peak.
- It has three unique features – music, food, and beach – that can be established as the brand of the destination.

Challenges:

- It is currently functioning as a *de facto* in-transit destination.
- The destination currently does not have enough rooms and beds of mid-end and high-end quality, a public marina, nor a proper community center for cultural activities.
- Also, the road infrastructure--conditions of streets, sidewalks and drains--is in a bad state.
- Coastal beach erosion is another major issue to consider. While the causes for this erosion has not been determined, it is speculated that contributing factors range from sand and gravel mining that is happening upriver, improper construction of the Dangriga Town Pier, and climate change.
- Dangriga has no centralized sewage collection and treatment system. Domestic wastewater is treated by means of traditional septic tanks and soak-aways. This may have adverse impacts on the water quality of coastal areas.

The Dangriga area contains some of the most highly sensitive natural ecosystems within Belize (such as at Gra Gra Lagoon). At the same time, there is currently an increasing

pressure from the residential and real estate sector to develop the southern areas of the community.

3.6 Dangriga Tourism Assets

Appendix 2 presents an inventory of the major Tourism Assets located in Dangriga. A description is provided of each asset identified. Each asset is also marked as either an actual or potential tourist attraction and organized based on four main categories. The categories are: 1) Natural Resources; 2) Cultural and Heritage Resources; 3) Purpose Built Resources, and 4) Events. Resources classified as natural are those that are created by nature while the other resources are created by humans. These man-made resources are categorized as follows:

- Cultural and Heritage – have cultural value or historical significance;
- Purpose Built – developed to attract tourists to the destination; and
- Events – bring tourists to the destination and include meetings, incentives, conventions and exhibitions.

Finally, an assessment²⁵ of the asset's tourism readiness is provided based on the following delineation:

Optimal – everything is in place for optimal visitor experience. This indicates that the asset has met all minimum criteria and at least 80 points of asset-specific criteria.

Moderate – the asset has some tourism infrastructure in place but will require a minimum investment. This indicates that the asset has met all minimum criteria and between 61 points to 79 points of asset-specific criteria.

Limited – the asset will require significant investment. This indicates that the asset has met all minimum criteria and between 41 points to 60 points of asset-specific criteria.

Inadequate – the asset is not recommended to be developed for tourism purposes. This indicates that the asset has met all minimum criteria but not more than 40 points of asset-specific criteria or has not met the minimum criteria altogether.

Table 16 shows the results of the Dangriga tourism assets assessment. Overall, there are thirty-three (33) identified tourism assets²⁶ in the destination. Of these, twenty-four (24) are actual assets while nine (9) are potential assets. The table also shows the breakdown of assets by category and their tourism readiness.

²⁵ Assessment was done based on professional judgement, existing knowledge about the asset, and stakeholder discussion.

²⁶ Only assets with some level of tourism potential have been initially identified.

TABLE 16: DANGRIGA TOURISM ASSETS ASSESSMENT

Asset Category	# Of Assets	Optimal Readiness	Moderate Readiness	Limited Readiness	Inadequate Readiness	Actual	Potential
Natural	23	6	10	4	3	17	6
Cultural & Heritage	6	4	2	0	0	6	0
Purpose Built	3	0	0	3	0	0	3
Events	1	1	0	0	0	1	0
TOTAL	33	11	12	7	3	24	9

3.7 Priority Issues for Tourism Product Development

Figure 11 shows the results of the problem tree analysis that emerged from stakeholder consultations. The main problem identified by stakeholders is insufficient community buy-in of tourism and lack of understanding about the benefits that may accrue from tourism. This problem according to stakeholders, exists because of three main issues. The first is that the community does not have a tourism mindset. This is caused by the general lack of understanding about the potential economic benefits of tourism. This latter issue can be attributed to the third issue, which is a divided community. Stakeholders characterize the community as largely individualistic with no culture of true cooperation and collaboration.

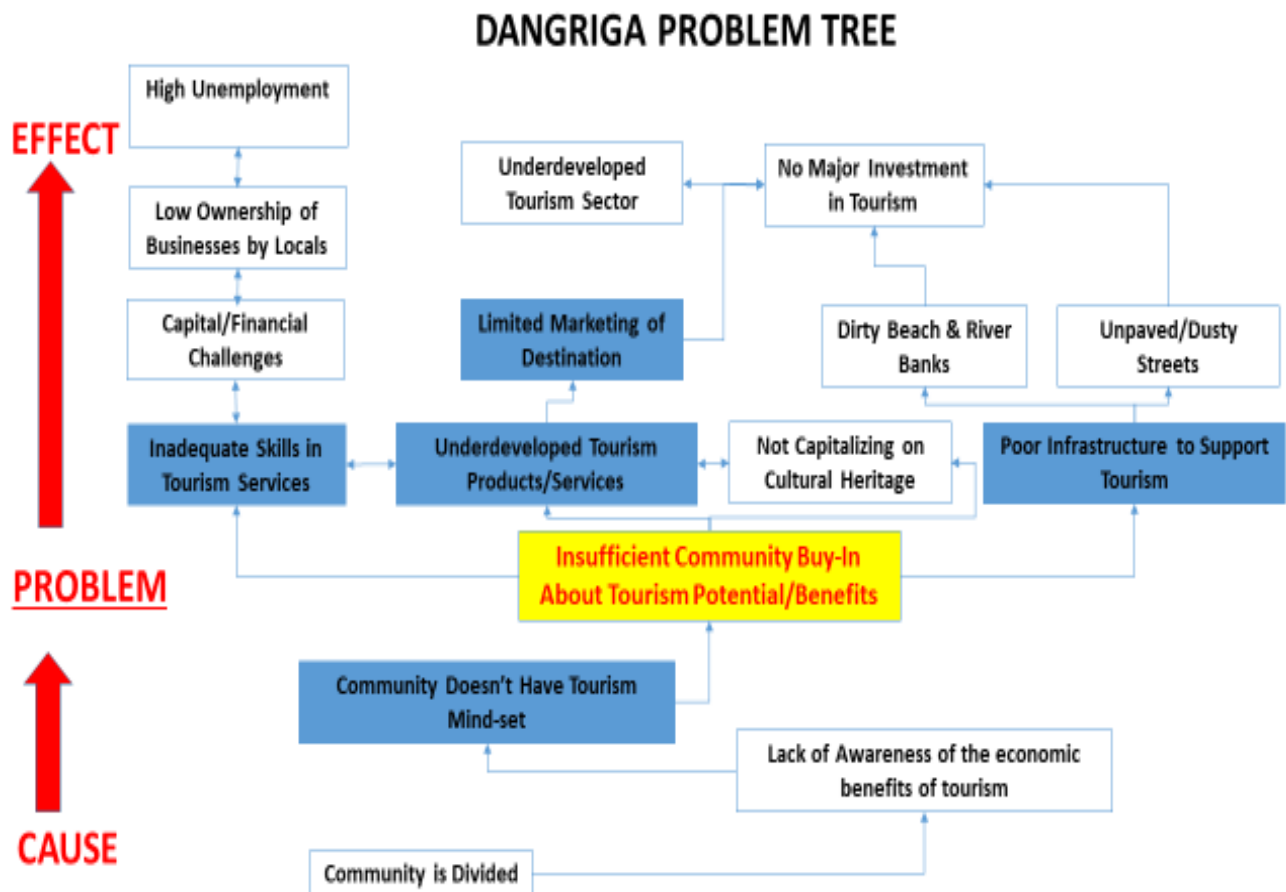
These problems have resulted in limited development of tourism products and services. Of note though, is that supply is contingent on demand, and tourism demand in the destination is low. The asset assessment confirms that the Dangriga destination does have tourism resources/assets that offer opportunities to develop new products and services. However, such development may be lacking because there is limited tourism demand.

Second, stakeholders stated that local persons are inadequately skilled in providing tourism services. This situation may be a result of several factors that are interconnected. Foremost as is mentioned before is the low demand for tourism services in the

destination. Skill development and entrepreneurship normally exist in a space where there are opportunities which currently is limited in relation to tourism.

The third issue is that the community is not capitalizing on its rich cultural heritage. While Dangriga is known as the culture capital of Belize, the consensus is that the traditional Garifuna culture is eroding. Finally, there is poor infrastructure in Dangriga Town to support tourism services. Many of the common spaces require renovations or new construction and maintenance to support the destination's tourism product. These issues are all interrelated and have a profound impact on tourism development in Dangriga Town.

FIGURE 11: DANGRIGA PROBLEM TREE



Upon consideration of these issues, stakeholders through consensus were able to frame and agree on a vision statement and goals for the Dangriga Tourism Destination. The vision and goals are presented in Sections 4.1 and 4.2 below.

3.8 Bottlenecks Hindering Competitiveness

Table 17 presents a number of bottlenecks or obstacles hindering the competitiveness of Dangriga. These bottlenecks are divided into the main aspects of product development, distribution and marketing and those that could relate to capacity building measures.

TABLE 17: BOTTLENECKS HINDERING DANGRIGA TOWN'S COMPETITIVENESS

BOTTLENECKS/OBSTACLES
<i>Product distribution and marketing</i>
Marketing and Promotion. Although Dangriga has all key elements for developing a distinctive brand (and is currently considered by Belizeans as the Culture Capital of Belize), it has not capitalized on the opportunity to develop a cohesive destination brand/identity. Furthermore, while there is promotion of the destination as part of the Belize brand occurring at the national level, there is limited and effective marketing occurring at the local level by existing tourism businesses.
Limited Product Offerings. While Dangriga has access to a wide diversity of tourism assets and attractions, similar to other destinations such as Hopkins and Placencia located in the Southeast Coast, there are very limited tourism products developed and marketed that benefit Dangriga Town. Dangriga Town serves primarily as a “jump off point” or in-transit destination. There are very limited accommodation options within the urban center of Dangriga. Outside of the urban center, there are many mid to high-end resorts that are quite self-sufficient and conduct their own tours and very effectively promote their properties.
<i>Infrastructure</i>
Waterfront. Dangriga Town's seafront lacks proper access and facilities and is confronting erosion reducing its appeal as a welcoming coastal destination with a strong sense of place. Proper boat docking (a marina) and pedestrian access infrastructure and facilities are needed.
Interpretation at Protected Areas: While some protected areas have good signage, there are many others such as Billy Barquedier National Park and Davis Falls need better interpretation and signage, as well as improved visitor facilities, such as trails, and environmentally-friendly public toilets.
Streets: The streets, sidewalks and drains in town are in bad condition and need urgent attention to improve the appeal of the destination.

BOTTLENECKS/OBSTACLES
<i>Product development and quality assurance</i>
Cultural Experiences. Hotel owners have remarked that their guests request information about other tours and excursions, particularly in the area of culture. Such tour options and alternatives can be expanded.
Dangriga Coastline. The coastline is under-utilized for tourism purposes primarily because of lack of waterfront infrastructure. The area is also filled with trash. The public-access to the Dangriga coastline is usually very dirty. There does not seem to be a reliable garbage collection and disposal system.
Community-based Tourism. Community-based types of tourism such as cultural tourism and Pesca-tourism are in very short supply in Dangriga.
Quality assurance. The quality of the accommodations offer and service quality in many establishments, such as restaurants, need to be improved in order to meet standards for international visitors. ²⁷
Garbage. Littering is a pervasive problem throughout Dangriga. There is poor enforcement of littering laws and a low level of civic pride.
Destination Management. Inadequate communication and collaboration among tourism stakeholders have resulted in an inadequate destination management structure.

3.9 Strengths and Opportunities

Boxes 3 and 4 below summarize the strengths and opportunities related to tourism development in Dangriga. The analysis helps to identify internal strengths and external opportunities that can be leveraged to help address the challenges and bottlenecks outlined in the previous section of the report.

²⁷ This is based on the personal observation of the authors of this report.

BOX 3: TOURISM DEVELOPMENT (INTERNAL STRENGTHS)

The Dangriga Tourism Destination is characterized by the following major “**internal strengths**”:

Assets & Amenities:

- Accessibility of destination – Dangriga can be accessed via the Southern Highway which is in good condition.
- Availability and easy accessibility of natural attractions within Dangriga town and surrounding areas.
- Major natural protected areas are easily accessible and located near the destination. These include South Water Caye Marine Reserve, Glover’s Reef Marine Reserve, Cockscomb Basin Wildlife Sanctuary, and Billy Barquedier National Park.
- English-speaking and welcoming multi-cultural community with a strong Garifuna presence. The destination features a rich intangible cultural heritage, which is expressed through Garifuna song, dance and music. The Garifuna language, dance and music are among those declared by UNESCO as “Masterpiece of the Oral and Intangibles Heritage of Humanity.”
- Annual cultural events, in particular, the Garifuna Settlement Day Re-enactment.
- Moderate diversity and range of accommodation options.
- Diverse culinary options, including cultural (Garifuna) culinary specialties.

Safety and Quality Assurance:

- The destination is more affordable and relatively safer than the other major coastal destinations in Belize, namely, San Pedro, Placencia, and Hopkins.

BOX 4: TOURISM DEVELOPMENT (EXTERNAL OPPORTUNITIES)

The Dangriga Tourism Destination can capitalize on the following major **opportunities**:

Product Development:

- Dangriga's multi-cultural makeup and central geographic location give it strategic and competitive positioning in its current and potential product offerings' it is in an even stronger position than Hopkins.
- Potential to develop an Agri-Tourism product that is based on the existing citrus, habanero pepper, and cassava industries.
- Investment by locals (existing business are predominantly locally owned).

Market Linkages:

- The use of various social media platforms to market the Dangriga brand.
- The possibility of capturing the sailing market.
- The Southeast Coast can be marketed and promoted as an integrated destination, as per the NSTMP.

SECTION 2: THE TDDP



4. Vision for Dangriga Tourism Industry

The vision statement for Destination Dangriga expresses the aspirations for tourism development. These aspirations were derived through a multi-step process. The first steps involved understanding the current situation. The results of the Dangriga destination diagnosis, PESTEL analysis, and SCOT analysis provide a comprehensive snapshot of the current state of tourism in Dangriga. Next, stakeholders elaborated a problem tree to identify priority issues that must be eliminated in order for the destination to translate its potential for tourism development into reality.

4.1 Vision Statement

Dangriga, a welcoming destination, offers our visitors the opportunity to immerse themselves in unique, authentic, and diverse eco-cultural tourism experiences in the living barrier reef, clean beaches, pristine rainforests, and Belizean culture rich in tradition and heritage.

4.2 Purpose Statements (Goals)

In order to realize the destination vision, the Dangriga destination must invest heavily in developing and delivering iconic experiences that are differentiated from products offered in Hopkins and Placencia and improving the visitor journey through improvements to town infrastructure, quality assurance and security.

This will be achieved by focusing on four strategic thrusts/goals:

Thrust 1: Tourism Education & Awareness

Dangriga is one of the most underdeveloped destinations in the Southeast Coast. There are only a few hotels in the area, and restaurants cater mainly to local customers. Consequently, the quality of services lacking in many aspects and the experience of stakeholders with the tourism industry is limited.

Residents and private sector will need to understand better how tourism can potentially positively impact the local economy for the community to buy-in to tourism. For the destination to develop sustainably, as is envisioned, it will need the buy-in of the community and local stakeholders. This thrust aims to create greater awareness and garner widespread buy-in by local stakeholders.

Thrust 2: Tourism Products and Services Development

There is a very limited variety of experiences (tours) being offered in Dangriga, and these tours are mainly marine focused. These include mostly short day-trips to nearby islands within the South Water Caye Marine Reserve. Tourism stakeholders realize that there are many other tourism assets that they are not yet tapping into. For instance, there are many terrestrial-based natural attractions and protected areas in the area, and of course, there is the rich, intangible cultural heritage of the Garinagu. The Dangriga destination will need to develop new experiences, expand its services and define its brand based on what is most iconic about this destination.

Thrust 3: Skills & Capacity Development for Tourism Related Services

Having a cadre of well-trained personnel is critical to the development of a high-quality tourism product for the Dangriga destination. Tourism business operators in Dangriga indicate that the majority of new employees do not possess the requisite skills for service jobs and lack a good understanding of the tourism sector. Often, employers are compelled to provide on-the-job training to address these gaps. Access to training in tourism is a critical factor for addressing workforce development needs. There is a need to have educational institutions and programs established that can provide the much-needed training.

Thrust 4: Branding and Marketing of Destination

The destination brand is an essential element of differentiating and positioning Dangriga as part of the Belize product. Having a clearly defined brand can help set Dangriga apart from other destinations in the Southeast Coast and the country. The brand also promotes recognition and represents the destination's promise to visitors. Dangriga has to differentiate its product in order to position itself successfully in an increasingly crowded marketplace.

It is therefore important that Dangriga develop a brand that captures the unique sense of place and what is most iconic about it. This is important not just to attracting visitors but also for the community and other tourism stakeholders in order to more effectively promote a shared sense of place.

5. Strategic Objectives and Actions

Tourism holds a special position in the contribution it can make to sustainable development and the challenges it presents. Firstly, there is the dynamism and growth of the sector, and the major contribution that it can make to the local economies. Secondly, tourism as an activity involves a special relationship between consumers (visitors), the industry, the environment and local communities. Sustainability is the responsibility of all those involved in tourism. Most of the impacts of tourism are the result of actions taken by private sector enterprises and by tourists themselves. Nonetheless, there is a clear need for the government to take a leading role if truly significant progress is to be achieved in making tourism more sustainable.

Sustainable tourism is not a discrete or special form of tourism. Rather, all forms of tourism should strive to be more sustainable²⁸. Making tourism more sustainable is not just about controlling and managing the negative impacts of the industry. It is also about ensuring economic and social benefits to local communities, and to raise awareness and support for conservation of the environment. All plans and actions must aim to strengthen the benefits and reduce the costs of tourism.

Tourism enterprises, while seeking long-term profitability, should be concerned about their corporate image, the relationship with their staff, and their impact on the global environment and that immediately around them. Local communities are seeking increased prosperity but without exploitation or damage to their quality of life. Environmentalists are concerned about the harmful impacts of tourism but also see it as a valuable source of income for conservation. Tourists are seeking high quality experience in safe and attractive environments; they are becoming more aware of the impacts of their travelling.

Sustainability relates to areas of public concern — air, water, natural and cultural heritage and the quality of life. Sustainable development is therefore about creating a better life for all people in ways that will be as viable in the future as they are at present. This means tourism growth is generating prosperity at different levels of society and addressing the cost-effectiveness of all economic activity. Crucially, it is about the viability of enterprises and activities and their ability to be maintained in the long term. It also means respecting human rights and equal opportunities for all in society. It requires an equitable distribution of benefits, with a focus on alleviating poverty. There is an emphasis on local communities, maintaining and strengthening their life support systems, recognizing and respecting different cultures and avoiding any form of exploitation. Lastly, it also means

²⁸ UNEP & WTO, 2005. Making Tourism More Sustainable: A Guide for Policy Makers

conserving and managing resources, especially those that are not renewable or are critical in terms of life support. Concerted action is required to minimize pollution of air, land and water, and to conserve biological diversity and natural heritage.

For the tourism industry, accepting this responsibility for sustainability is not only about good corporate citizenship, but it is also in the industry's own of self-interest. Any harm that is inflicted to the natural, cultural or social environment of destinations can lead to their eventual destruction or loss of value as a tourism product.

The strategies and actions proposed in this plan are therefore guided by these concepts and principles. They are intended to: 1) Make optimal use of environmental resources that constitute a key element in tourism development, while maintaining essential ecological processes and helping to conserve natural resources and biodiversity; 2) Respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance; and 3) Ensure viable, long-term economic operations, providing socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities.

This plan also addresses economic viability by carefully assessing the destination market and seeking to deliver on visitor satisfaction, product development and capacity building support. The need for local participation and prosperity is addressed by seeking to maximize returns to the community, support locally owned businesses, development of the local labour pool, targeting higher spending overnight market by developing daily destinations, improve price and distribution of local products, and direct marketing of the destination to capture as much of the travel expenditure as possible. There are also actions that aim to improve market participation for informal players.

Lastly, employment quality and employment regulations including equal opportunity, conditions of work, and health and safety are addressed by the emphasis on ensuring the enforcement of industry regulations. To ensure ecological integrity, the plan promotes tourism development that is appropriate to local environmental conditions. Key to the aim of maintaining physical integrity has policies and instruments in place at a local level that influence the location and nature of new development. There is a direct relationship between the product offerings of the destination, and national parks and other protected areas. Therefore, adequate environmental laws and regulations will need to be continuously enforced to help protect the environment. Fortunately, for Belize, these

regulations are already in place. However, enforcement will need improvement in the target destination.

The strategic objectives and corresponding actions presented below are expected to contribute to achieving the four main goals/thrusts outlined in the previous section. These key strategies and activities make up the core elements of the Dangriga Tourism Destination Development Plan. The strategic objectives and corresponding activities are presented under their aligned thrusts.

Thrust 1: Tourism Education & Awareness

Strategic Objective 1: Enhance community awareness

Given the underdevelopment of the Dangriga destination, stakeholders who were consulted strongly agreed that the best place to start in the development of the Dangriga destination was to create awareness about the potential of developing the tourism sector as well as its potential benefits and pitfalls. It is therefore critical that this message is promoted within the community and the community members are able to recognize the opportunities available to them in the tourism sector and to identify ways in which they can become involved.

a) Develop and implement a tourism promotional campaign

The community-wide tourism promotional campaign should be designed to highlight the current impacts of tourism in the community and shine a spotlight on the individuals who are helping to develop the sector. While the core message of the campaign will be focused on the real opportunities that tourism can offer residents, the campaign should also seek to inspire pride in the iconic assets (tangible and intangible) that define the true sense of place. The campaign will run in the first instance for six months and will be repeated as needed.

There are several existing organizations and groups who are well positioned to assist in promoting tourism within Dangriga. These include the National Garifuna Council (NGC), Delile Academy, and Ecumenical High School and Sixth Form. Delile and Ecumenical are both educational institutions and can play an excellent role in reaching students and by extension the next generation of tourism professionals.

b) Documenting the Cultural Heritage and Culture of Dangriga

Places are shaped by the residents that live there, their way of life and economic activities. Dangriga, like most towns across Belize, has a rich cultural heritage and living culture.

Cultural heritage refers to the legacy that the residents of Dangriga inherited from earlier generations. Culture heritage includes items that have historical significance and bring to life architecture, structures, monuments, artefacts, arts and crafts. Culture is all that constitutes the way of life of the residents of Dangriga. It includes traditions, habits, customs, beliefs, and capabilities that define Dangriga's society. While heritage is extrinsic, culture is intrinsic.

While the vibrant culture of the Garinagu is celebrated and internationally recognized, many details of its history remain in oral form. Similarly, there is no documentation of the role of Dangriga in the development of essential industries such as the citrus and banana industries in southern Belize. Historical knowledge and stories are very valuable for residents and visitors.

Identifying and documenting iconic aspects of cultural heritage and culture of Dangriga can help to create new knowledge, inform stories and inspire ideas for new visitor experiences. The iconic elements of cultural heritage and culture can be captured through audio-visual mediums that can be easily accessed by community organizations, educational institutions and the tourism sector.

c) Garifuna culture retention (school for music, dance, food, etc.)

There is concern that with the growth of tourism, modernity and globalization, the younger generations of Garinagu are not adequately learning various aspects of the culture. The increase in tourism can have a positive effect on the local culture as the preservation of that culture can be incentivized by the benefits of tourism. This retention initiative will focus on preserving Garifuna language, music, dance and food. Local schools will be encouraged to practice these various aspects of the Garifuna culture, and community-based events will also be developed in order to promote these cultural elements at a broader scale.

Thrust 2: Tourism Products and Services Development

Strategic Objective 2: Enhance critical infrastructure that supports tourism

Infrastructure does not only help to improve access to public services and improve the physical conditions of a destination but also affects the experience of visitors. Furthermore, it helps to facilitate economic activities which in turn can have a positive impact on the growth of the destination overall. This development, however, will require the participation of several essential government agencies.

Dangriga Town's main natural assets as a coastal community and emerging tourism destination—its coastline and beach areas—are quite neglected. The Dangriga Municipal

Development Plan reinforces this finding by indicating that there is ample room for improving Dangriga's connection with the waterfront and building on it to beautify the urban environment, support small local business development, provide recreation opportunities and attracting tourism. There are several priority initiatives in this regard outlined below.

a) Stann Creek River Bank improvement

The North Stann Creek River empties into the sea just south of the Y-Not Island and the Dangriga Municipal Market. This area is being targeted as one of the main activity hubs for the town. This area already serves as a traditional gathering place, and its enhancement will only add to the ambience and aesthetics. This objective of the proposed improvement of the Stan Creek River Bank is to create a public waterfront area that residents and visitors can use for recreation and leisure. This project would include grading the terrain along the river banks and putting in a path or walkway (earthen or other), benches, and street lighting. This improvement can be done in phases.

b) Havana Creek enhancement

The area where the Havana Creek empties into the sea makes up part of the main “downtown area” of Dangriga. Havana Creek is located south of where the North Stann Creek River also empties into the sea. This area when enhanced can be used for leisure and relaxation by both residents and visitors alike. The project would involve reclaiming a portion of the creek, building a retaining wall and siting and developing a promenade area. The promenade would feature a pedestrian area, trees and shading devices, street lights, kiosks that can be used by local vendors, and urban furniture.

c) Pier Re-development

The embarkation and disembarkation of visitors onto marine vessels in Dangriga Town are currently done either at the old community dock or at private docks. This makes it difficult for tour operators and tour guides who do not have access to a docking facility to service their guests properly. Equally important, the existing dock in Dangriga serves as an international port of entry. There are scheduled boat runs between Dangriga and Honduras.

It is therefore imperative that a pier with docking facilities be constructed in Dangriga Town. The pier would not only serve everyday use by tour operators but must be built to serve as an international post, a marina for other boats and yachts to anchor, resupply, and restock their vessels. This will help the destination to position itself for nautical tourism.

The development of the pier could be accompanied by improvements to the open space next to the pier. A welcome area could include adequate kiosks for service providers, food court, public restroom, and palapas that provide covered, seating areas. The objective is to develop a well-designed common space that will attract visitors and residents.

d) Y-not Island improvement

The Y-not Island is a central public space in Dangriga that has direct access to the river and the sea. It is currently used as a nucleus for cultural and sporting activities such as basketball and volleyball as well as for hosting entertainment concerts and music shows. Improvements to this space would mean improvements in the quality of services provided and would become a full-time hub of social and entertainment events. These improvements would entail the construction of the main building, provision of kiosks and other improvements as indicated in the Municipal Development Plan.

e) Beach Maintenance

Dangriga's beaches are underdeveloped, underutilized and often filled with garbage. Given that the beaches are significant assets and attractions in town, a beach enhancement and maintenance program needs to be undertaken specifically for the beach area south of Havana Creek. Beach enhancement for this area includes (a) renovation of the existing /provision of bathroom facilities; (b) building of shade cabanas; (c) landscaping with the planting of shade trees, and (d) involving beachfront property owners to promote the area as a tourist destination. The beach maintenance program would include a regularly scheduled beach clean-up campaign. Community participation in this project can help to foster community stewardship in maintaining a clean community for health and aesthetic reasons.

f) Provide adequate and standardized signage

Well-designed welcoming, directional (way-finding), and location signs will be installed in Dangriga to facilitate the movement and experience of visitors during their stay.

g) Improve town lighting in key areas

As Dangriga continues to grow, several dark and unlighted areas are observed throughout the town. These conditions contribute to increased vulnerabilities to crime and can be addressed through improved lighting. Common public areas and areas with a high density of visitors will be investigated to determine lighting conditions and where necessary, improve the lighting in those areas as a matter of priority. The Belize Electricity Limited will need to be engaged in this action as they have the sole responsibility to provide street lighting.

h) Provide public resting areas and restroom facilities

There are currently very few restroom facilities in Dangriga and are often not well maintained. As the destination develops, it will need to be more visitor friendly and having these essential amenities will make visitors more comfortable. Furthermore, having public restrooms and resting areas provides added convenience to all visitors to Dangriga. These public restrooms will be provided at the enhancements projects cited above, and some will also be located in strategic areas. All public restrooms are to be operated and maintained by the Dangriga Town Council.

i) Develop an urban zoning plan

A Municipal Development Plan has already been developed for Dangriga. However, while land use proposals were made in the plan, development standards, design guidelines and zoning were not specified. Already some conflicts between different users are beginning to emerge. Even though Dangriga is an emerging tourism destination, it is home to many residents and so this balance between the need of residents, developers and visitors need to be managed more pro-actively. The development of a community zoning plan can help to ensure that the destination's brand is not affected by future development activities and ensure that growth is managed in a way that does not negatively impact the local residents. The zoning plan will determine the physical location of certain activities including businesses, accommodations, bars and clubs, residences and other public use areas. Once the community zoning plan has been developed, building codes and other regulations can then be fully enforced with the support of the Belize Building Authority.

Strategic Objective 3: Develop Cultural Heritage and Cultural Attractions and Experiences

Dangriga is historically a Garinagu Town. The Garinagu people have a unique history, culture, language and traditional practices. The Garifuna culture (language, dance and music) has been recognized by UNESCO as a masterpiece of the intangible heritage of humanity. This is not currently recognized or readily displayed when visiting the destination, but this can change. The Garinagu have a historical connection both to the land and to the sea. The music, dance and food of the Garinagu are popular throughout Belize, and this can be used as the centrepiece of creating Dangriga as a daily destination.

a) Defining iconic aspects of cultural heritage and culture

The cultural heritage and culture of the Garinagu are some of the iconic elements of this destination. At the moment, however, this iconic element remains underdeveloped. New attractions and experiential tours that offer visitors the opportunity to experience Garifuna food, song, dance, music will need to be developed. Tours focused on experiencing the various aspects of Garinagu culture will be developed along with local

cultural guides. These excursions will be packaged and made available to other destinations to offer to their guests.

While the strategic focus will be on the Garifuna culture, the culture of other minority ethnic groups represented in Dangriga can be integrated into the development of cultural experiences.

b) Enhance the Gulisi Garifuna Museum

The Gulisi museum offers a full multimedia experience including artefacts and pictures about the origins of the Garinagu people, their history, and culture. The museum needs to be further developed to enrich the experience of visitors better.

c) Expand cultural events and festivals

The two main festival events that take place annually in Dangriga include Garifuna Settlement Day and the re-enactment of the Garifuna's arrival to Belize (November 19), and Dangriga Day. More festivals and events will be planned, highlighting cultural cuisine, dances and music.

d) Develop local crafts and souvenirs

There are already well-known painters and musicians from Dangriga. There is also a selection of arts and craft such as drums, maracas, cloth dolls, carvings and a wide variety of fine art such as paintings being done by local residents. This existing foundation of artisans will be used to further develop local art, crafts and souvenirs which is collorary to the development of Dangriga as a daily destination. This initiative will focus on improving the selection of items available as well as quality control and branding. A unique Dangriga line of crafts and souvenirs will be developed. The further development of the local crafts of souvenirs of Dangriga will not only allow other persons to participate in the development of the destination but will also provide an added feature to the experience of visitors coming to the village. The local crafts and souvenirs will contribute to the authenticity of the indigenous culture of the Garifuna being showcased.

Strategic Objective 4: Diversify marine and terrestrial-based attractions and experiences

The product offerings of the Dangriga destination will need to be developed as this is the primary purpose tourists visit the destination. The tourism assets will need to be further assessed, and the portfolio of attractions and excursions will need to be enhanced and developed in some instances in order to have a marketable destination that can meet the interest and expectations of visitors. There are opportunities to expand on marine-based activities as well as the development of new activities based on the agriculture activities going on in the area such as pepper sauce production, citrus and cassava.

a) Provide training in safety for tour operators and tour guides

In order to ensure the quality of services and safety of visitors, the tours provided in marine and terrestrial domains will need to be enhanced by training tour operators and tour guides in visitor safety. This includes areas such as:

- Manifest for all vessels
- Life safety equipment
- Proper monitoring and management of terrestrial & marine tours
- Accountability enforcement

b) Expand current marine-based and terrestrial-based excursion and tours

The sea is one of Dangriga's biggest asset and much of the tourism experience it offers at the moment is marine based. These services, however, can be further expanded to include other activities aside from the fishing, snorkelling, and diving which are the most common activities at the moment. Additional services that can be developed and offered as part of tour packages include paddle boarding, windsurfing, sailing, live aboard yachting and sport-fishing.

On the terrestrial side, forest-based activities are underdeveloped but nonetheless present an opportunity for development and expansion of services. Additional services that can be developed and offered as part of jungle tour packages include birding, wildlife, night walks, hiking, camping, caving, waterfall, and river tubing.

Also, there is the opportunity to develop agri-tourism attractions and experiences in the destination. The Dangriga destination is home to numerous large-scale agriculture activities that include citrus, pepper, and cassava production and processing. Tourist excursion products can easily be designed around these agriculture activities.

The development of these new activities is tied to the previous activity having to do with asset assessment. The readiness of those assets will help determine whether these activities can be undertaken in an economical fashion.

c) Assess the Dangriga destination tourism assets

The medium and long-term plan for the development of tourism assets should be based on a comprehensive tourism asset assessment. This exercise should encompass the following actions: identifying potential tourism assets, visiting the assets, plotting the assets' location, properly describing the assets, photographing the assets, assessing the assets' tourism readiness, and making recommendations for tourism product offers that can be designed around the assets.

It is expected that there will be a snowball effect in the identification of potential tourism assets. While some assets are known, ground truthing will lead to other unknown and or undocumented assets only familiar to locals in a particular area. Once this process has been carried, a better understanding of the development needs of the assets can be arrived at, and a plan can then be developed and implemented.

Thrust 3: Skills & Capacity Development for Tourism Related Services

Strategic Objective 5: Strengthen local capacity to provide tourism services

Having a well-trained workforce is critical to the development of a high-quality product for the Dangriga destination. Training of front-line personnel—those individuals that spend the most time with visitors such as front-desk personnel, waiting for staff in restaurants and tour guides—is vital to delivering a memorable experience. While there are some persons who are already working in the tourism sector, according to business operators, many do not always come with the requisite skills and understanding of the tourism sector. Many end up providing on-the-job training for those persons they hire. Additionally, there is a need for expanded services, especially in tour guiding. There are now several specialities that can be pursued which would make the tour guide more effective in delivering different types of experiences.

a) Provide training in hospitality and tour guiding services

There needs to be an immediate expansion of the training provided in hospitality services management. This is an area that has been uniquely identified by the stakeholders in order to develop high quality and memorable service to visitors who come to the destination. This training can be done at the local educational institutions.

There are a limited number of tour guides in Dangriga, and if the demand for tour increases as part of the development of the destination, there will be a need to be trained and available. Most of the guides are currently marine guides, and as such there will be a need to train terrestrial based guides. Additionally, in order to take advantage of niche markets, there will be a need for additional training in niche areas such as birding, caving, archaeology and scuba diving. Much of the training will need to be done in Dangriga in order for residents to take advantage of the training opportunity provided.

b) Enhance the tourism educational programs at local educational institutions

There are local educational institutions such as the ITVET and Ecumenical High School and Sixth Form who are teaching tourism courses to their students. These programs, however, can be improved in two main ways. One is for the schools to attract and retain

skilled tourism trainers at the educational institutions. These schools are often competing with the private sector for well-trained teachers. These trained persons will need to have the right incentives to be recruited and retained by the schools. Secondly, the schools will need to ensure that practical aspects are incorporated into their tourism curriculum in order to give students as much real-world experience as possible.

c) Enhancing tourism market readiness of entrepreneurs

Local entrepreneurs will be able to succeed if they have the right level of technical support. There is a need to provide assistance in developing and pricing services for the tourism industry and to improve business management skills. There are opportunities for local residents to become involved in the tourism industry and to develop their own businesses however many have not had the experience of actually being in business. Those who venture into some type of business do so mainly out of sheer interest and perseverance. This shortcoming can be addressed and the quality of service and profitability improved with the right level of business management training. The Small Business Development Center arm of BELTRAIDE (SBDC) is especially suited for this type of development, and therefore, a partnership with the SBDC will need to be developed in order to bring their business mentoring and development services to Dangriga entrepreneurs. This training can be provided on-site through workshops throughout the year.

d) Organize & train cultural groups in tourism

There are several cultural groups in Dangriga that operate on an informal basis. They do not have adequate training or sufficient experience in the tourism sector and the role of cultural activities in creating a tourism product. These groups will be identified, organized and trained to develop cultural experiences that can be promoted through Airbnb Experiences among other mediums.

Thrust 4: Branding and Marketing of Destination

Strategic Objective 6: Create a destination brand for Dangriga

Stakeholders stated that presently, there is no established and uniform brand for Dangriga and as such, each industry actor emphasizes different aspects of the destination experience. A common identifiable brand that embodies the unique features of Dangriga will need to be developed. Establishing this can be a selling point for all operators and stakeholders and what Dangriga has to offer can be better communicated.

a) Develop a brand and marketing strategy

Stakeholders need to identify, document and reach consensus on the most iconic aspects of Dangriga's cultural heritage, culture and natural heritage. This process can help to

define the destination's brand, inform stories and inspire ideas for new visitor experiences.

Dangriga currently has a low market share in the Southeast Coast based on guest occupancy. To increase market share, destination tourism leaders and leading organizations will need to come together and develop a cohesive marketing plan. This will entail defining realistic goals for growth. It will also include establishing a coordinating mechanism for stakeholders, including but not limited to government agencies, hotels, tour operators, transportation providers, tour guides and trade associations as well as the NGO community, to share responsibility for its implementation actively.

The marketing plan will set goals for growth in overnight and domestic visitation. The marketing plan will include practical strategies for communicating Dangriga's brand with potential visitors internationally. The plan will further outline the channels to be used for communication including engaging with travel trade, i.e. tour operators, wholesalers, travel agents, and online retailers—to market the destination effectively.

The plan will also articulate how destination marketing efforts will be sustained over time—both from a financial and human resources standpoint. The coordination mechanism will need to ensure that destination level marketing and promotion persists over time and that proactive coordination is occurring between the destination and the BTB, BTIA and BHA.

Some specific marketing activities that should be included as part of the plan are to:

- Include Dangriga tourism product offering in national tourism promotions;
- Create and publicize inventory of tourism experiences and events for the destination; and
- Design and launch media (website, social media, collateral materials) for destination promotion.

6. Tourism Investment Project Ideas

6.1 Identification of Priority Investments

Table 18 contains investment project ideas (with broad cost projections) for improving the product that Dangriga will provide.

TABLE 18: DANGRIGA PRIORITY INVESTMENT PROPOSALS

Dangriga priority investment proposals				
Project Ideas	Description	Target Date	Responsible Party	Projected Cost (BZ\$) (Indicative) ²⁹
Waterfront <ul style="list-style-type: none"> • Thrust 2 • Primary Strategic Objectives: 2a, 2c, and 2h • Secondary Strategic Objectives: 2d, 2e 	Improvements of boat docking facilities along North Stann Creek River, pedestrian access and pathways along the river and Dangriga coastline, sea and riverfront access. Space will be provided for events, bazaars and community gatherings and effectively link the townscape to the sea. This may also serve as an arts and entertainment quarter, with bathroom facilities and picnic areas.	March 2020	BTB, Dangriga Town Council, MTCA	\$500,000
Signage <ul style="list-style-type: none"> • Thrust 2 • Primary Strategic Objective: 2f 	Well-designed welcoming, directional (way-finding), and location signs within and on the way Dangriga Town to facilitate visitors during their stay – 2 entering town, 5 around town, 2 leaving town, and 4 directional signs.	June 2019	BTB	\$20,400

²⁹ These are very broad cost projections and should not be considered accurate.

Dangriga priority investment proposals				
<ul style="list-style-type: none"> Secondary Strategic Objectives: 3a 				
Festival Series <ul style="list-style-type: none"> Thrust 2 Primary Strategic Objective: 3c Secondary Strategic Objectives: 3a 	A Festival Series that incorporates and calendarizes the various events that take place annually in Dangriga. Marketing/promotion, as well as festival planning and budgeting, will be carried out.	Various	BTB, NICH, and Dangriga-Chapter	\$10,000 per festival
Dangriga Town Tour <ul style="list-style-type: none"> Thrust 1 & 2 Primary Strategic Objectives: 1b and 3a Secondary Strategic Objectives: 1a 	Infrastructural improvements to several monuments and historical buildings that include: Thomas Vincent Ramos Monument next to the junction of Commerce and Front Street; the Drums of Our Fathers Monument; and the Gulisi Garifuna Museum.	June 2020	BTB, MTCA, IDB	\$200,000
Gulisi Museum <ul style="list-style-type: none"> Thrust 1 & 2 Primary Strategic Objective: 3b 	A Garifuna Museum that brings together artefacts, pictures and documents on Garifuna history and culture, including an exhibit on the life and music of the late Garifuna musician Andy Palacio. This museum is located 2 miles out of Dangriga Town.	March 2021	BTB, MTCA, NICH, Dangriga Town Council	\$100,000

Dangriga priority investment proposals				
<ul style="list-style-type: none"> Secondary Strategic Objectives: 1b 	Investment needs include: 1) Marketing/branding strategy, 2) Training in hospitality, museum curating, and other, 3) Development of exhibits, 4) Training for cultural performances, and 5) specialized training of local tour guides in conducting tours. Infrastructural improvements such as a space for events, interpretive signs, and night time illumination, will need to be done.			
<p>Agri-Tourism Attractions (Marie Sharp's Factory, Citrus Company, Cassava Company)</p> <ul style="list-style-type: none"> Thrust 3 & 4 Primary Strategic Objective: 3a Secondary Strategic Objectives: 6a 	<p>Marie Sharp's is a sauce and juice manufacturer based just outside Dangriga Town and is mostly known for its habanero pepper hot sauce. Sabal's Cassava Factory is a family-owned business that produces traditional Garifuna snacks from the cassava tuber. The Citrus Products of Belize Ltd processes citrus into juices and other products.</p> <p>Investments needs include 1) Marketing/branding strategy, 2) Training in hospitality, museum curating, and other, 3) Development of exhibits, and 4) specialized training of local tour guides in conducting tours. Infrastructural improvements such as a space for events, restaurant facilities, and interpretive signs will need to be done.</p>	March 2020	BTB, Marie Sharpe's, Citrus Companies, Cassava company	\$150,000
<p>National Parks and Reserves</p> <ul style="list-style-type: none"> Thrust 2 Primary Strategic Objective: 2f Secondary Strategic Objectives: 4b 	Improvements to the access road (6 miles) into an all-weather road from Maya Center to the Cockscomb Basin Wildlife Sanctuary headquarters, and from the main highway to the other reserves, such as Mayflower Bocawina National Park and Billy Barquedier National Park. The trails at these national parks need to be improved, along with associated visitor facilities. The nature trails and hiking paths to Victoria Peak need to be regularly upgraded. Mooring and marker buoys and interpretive signs need to be installed at Man-O-War Caye, which is a bird sanctuary featuring three different types of	December 2021	Belize Audubon Society, Protected Areas Conservation Trust, BTB	\$5,000,000

Dangriga priority investment proposals				
	mangrove vegetation that provide sanctuary to a variety of indigenous bird species, including Pelicans, Brown Booby birds, and the Magnificent Frigatebirds (also known as Man-O-War birds). Other improvements such as perimeter fencing and upgraded walkways to attractions (such as waterfalls) and stairways are also needed at the reserves/parks. ³⁰			
Falls and Caves <ul style="list-style-type: none"> • Thrust 2 • Primary Strategic Objective: 2f • Secondary Strategic Objectives: 4b 	Angel's Falls, also known as "the gap", located 26 Miles on the Hummingbird Highway; Davis Falls, one of the most iconic natural attractions in the country with a total height of around 500 feet (120 meters), located on mile 14.5 on the Humming Bird Highway near Dangriga; and Macaroni Hills Cave, a system of caves located on mile 11 on the Hummingbird Highway. Improvements such as perimeter fencing, facilities for ticket sales and for a site guard(s)/lifeguard, walkways to the attractions and defined stairways, and a space for events.	December 2020	BTB, PACT	\$250,000

³⁰ Note: This priority investment proposal is also included in the Hopkins TDDP, given the proximity of these national parks and reserves to both destinations. This investment would obviously only need to be made once.

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

6.2 Project Funding Mechanisms

The Dangriga destination should consider the following guidelines regarding tourism funding:

- Dangriga needs a “tourism champion”, whether a very influential and highly respected person or organization, who takes initiatives and understands the process and challenges. This person or entity should attend key events and set up meetings to leverage inter-departmental tourism support for the improvement of the tourism product within the destination, as well as for the strengthening of tourism industry structures and processes;
- Develop a resource mobilization strategy that will define creative mechanisms to secure the required financial resources for the destination, involving both the public and private sector. For example, 1% to 5% of tourism-related revenue (e.g., hotel tax, tour operator licence, and tour guide licence) collected in Stann Creek could go towards a Tourism Trust Fund for the Dangriga Destination;
- Build on efforts already underway in the destination in order to optimize on the available resources; and
- Ensure that there is strong investment coordination, linking leveraged funds to projects on the ground.

Financial Institutions

Financial institutions are a significant source of infrastructure development funding, through commercial loans extended to infrastructure project developers. The main private sector financial institutions in Belize include four commercial banks and six major credit unions. Table 19 shows the list of private sector financial institutions.

TABLE 19: FINANCIAL INSTITUTIONS

Commercial Banks	Credit Unions
Atlantic Bank Ltd.	Blue Creek Credit Union Lt.
Belize Bank Ltd.	Holy Redeemer Credit Union Ltd.
Heritage Bank	La Inmaculada Credit Union Ltd.
Scotiabank	St. Francis Xavier Credit Union Ltd.
	St. John's Credit Union Ltd.
	Toledo Teachers Credit Union Ltd.

In addition to commercial banks and credit unions, there are also various development finance institutions, such as the Development Finance Corporation and the National Bank of Belize, where funding can be sourced for tourism development projects. Other sources of tourism funding and technical assistance are available through government loans and grants from regional and international development agencies such as the Inter-American Development Bank, the Caribbean Development Bank, the Central American Bank for Economic Development, among others.

6.3 Product Clusters, Tour Itineraries & Experiences

TABLE 20: DANGRIGA PRIORITY PRODUCT CLUSTERS

Product Cluster	Description	Itinerary
<p>Dangriga Town Cultural Experience (Town Tour)</p> <ul style="list-style-type: none"> • Thrust 1 & 2 • Primary Strategic Objectives: 1b and 3a • Secondary Strategic Objectives: 1a 	<p>The Town Tour is designed to highlight the key aspects of Dangriga Town and Garifuna culture, including cultural dances, traditional cuisine, agritourism, religious rituals, artisans (Mercy Sabal -Dollmaker, Austin Rodriguez and daughters -drum makers etc.) as well as interpretive stops at historical buildings and monuments such as the Thomas Vincent Ramos Monument, the Drums of Our Fathers Monument, the Gulisi Garifuna Museum; and the Pen Cayetano Studio Gallery.</p>	<p>Excursion options may focus on any the following, or a combination:</p> <ol style="list-style-type: none"> 1. Gastronomy (traditional cuisine) 2. Historical/Cultural 3. Religious/spiritual ceremonies 4. Music and dance 5. River tours/wildlife viewing 6. Museum visits
<p>Tours to protected areas and other natural attractions</p> <ul style="list-style-type: none"> • Thrust 2 • Primary Strategic Objective: 2f • Secondary Strategic Objectives: 4b 	<p>Tours to nearby national park and reserves falls and caves (see Table 16)</p>	<p>Excursion options include:</p> <ol style="list-style-type: none"> 1. Birdwatching or wildlife viewing tours 2. Zip-lining 3. Sports fishing tours (e.g., trolling for snook or tarpon) 4. Caving 5. Hiking 6. Swimming at waterfalls 7. Camping
<p>Agri-tourism Tours</p> <ul style="list-style-type: none"> • Thrust 3 & 4 • Primary Strategic Objective: 3a • Secondary Strategic Objectives: 6a 	<p>Tours to learn about the production process at three critical industries in the area: 1) Marie Sharp's Factory, 2) Sabal's Cassava Factory, and 3) Citrus Processing Factory (CPBL).</p>	<p>Excursion options may focus on any the following, or a combination:</p> <ol style="list-style-type: none"> 1. Gastronomy (cuisine featuring products of the industry) 2. Historical/Cultural 3. Factory tours 4. Museum visits
<p>Garifuna and Creole Cuisine</p> <ul style="list-style-type: none"> • Thrust 1 & 2 • Primary Strategic Objective: 1b 	<p>Garifuna meals mainly incorporate ground vegetables, plantains, seafood and coconut milk. Most commonly known Garifuna dish is ereba (cassava bread) which is made from grated cassava root. Cassava bread is eaten with fish, machuca (pounded green</p>	<p>The main feature of this product cluster is to experience Garifuna and Creole cuisine. Foodies come to Dangriga with this as the focus of their travel but take advantage of the other available tourism products.</p>

Product Cluster	Description	Itinerary
<ul style="list-style-type: none"> • Secondary Strategic Objectives: 1c and 3a 	<p>and ripe plantains), hudut (fish soup), or bundiga.</p> <p>Among the main staples of a Creole, dinner is rice and beans with some type of meat and a salad or coleslaw. There is sometimes the incorporation of seafood. Other types of Creole Cuisine are inclusive of Creole bread; fry jacks, and boil up.</p>	
<p>Festival Series and Events</p> <ul style="list-style-type: none"> • Thrust 2 • Primary Strategic Objective: 3c • Secondary Strategic Objectives: 3a 	<p>The two main festival events that take place annually in Dangriga include Garifuna Settlement Day and the re-enactment of the Garifuna's arrival to Belize (November 19), and Dangriga Day. More festivals and events will be planned, highlighting cultural cuisine, dances and music.</p>	<p>Based on the dates of the specific events, which take place mostly within Dangriga.</p>

7. Management Arrangements

This section describes the responsibilities of the various relevant entities to ensure that the TDDP implementation is carried out on a timely and efficient basis. The main parties responsible to either implement or champion the implementation of the TDDP include the following: 1) The Belize Tourism Board, 2) the Ministry of Tourism, 3) the Dangriga Town Council, 4) the National Institute of Culture and History, and 5) the TDDP Monitoring and Coordination Committee.

The Belize Tourism Board:

- Co-focal point is responsible for overseeing the implementation of the TDDP.
- Given the marketing and product development role of the BTB, the BTB (as a non-voting member) will:
 - Provide a Local Focal Point assigned to the MCC who shall be engaged through a formal schedule with MCC Members, Subcommittees and Community Partners with the objective of championing the implementation of the TDDP.
 - Sensitization of the primary targets of the National Sustainable Tourism Master Plan about the Dangriga destination.
 - Technical data and information including but not limited to market demand, tourism indicators, the economic contribution of tourism.
 - Training and capacity building support to enhance local skills in tourism marketing and promotion and priority areas agreed and identified in consultation with the Committee.
 - Technical support within the planning process: investment planning, project identification and prioritization.
 - Assistance in the identification of funding sources for priority tourism projects, actions and investments included within the TDDP.

The Ministry of Tourism:

- Co-focal point is responsible for overseeing the implementation of the TDDP.
- Given the overarching role of the Ministry of Tourism to create an enabling environment for sustainable tourism development, the Ministry (as a non-voting member) will:
 - Provide a Local Focal Point assigned to the MCC who shall be engaged through a formal schedule with MCC Members, Subcommittees and Community Partners with the objective of championing the implementation of the TDDP.

- Sensitization of the locally sustainable tourism framework of the National Sustainable Tourism Master Plan.
- Technical support in the formation and establishment of the Committees.
- Technical data and information including but no market demand, local demographics, the economic contribution of tourism, physical planning, biodiversity and climate change.
- Training and capacity building support to enhance local skills in sustainable tourism planning and management and priority areas agreed and identified in consultation with the Committee.
- Technical support within the planning process: developing strategic documentation, investment planning; project identification and prioritization.
- Liaison support with other national Government agencies where necessary, in matters of concern to the MCC.
- Assistance in the identification of funding sources for priority tourism projects, actions and investments included within the TDDP.

The Dangriga Town Council:

- The Councilor with tourism portfolio shall be assigned to sit on the TDDP MCC.
- The Dangriga Town Council shall integrate relevant components of the TDDP into its annual work plans and budgets.
- As such, the Dangriga Town Council shall provide support in the identification of funding sources for priority tourism projects, actions and investments included within the TDDP and focused on the municipality (Dangriga Town).
- Liaison support with local Government agencies where necessary, in matters of concern to the MCC and related to TDDP implementation.

The National Institute of Culture and History:

- Given the management role of NICH about the archaeological sites and monuments, NICH will:
 - Provide training and capacity building support to enhance local skills in culture and history, as well as priority areas agreed and identified in consultation with the MCC.
 - Technical support within the planning process: investment planning, project identification and prioritization.
 - Assistance in the identification of funding sources for priority culture-related tourism projects, actions and investments included within the TDDP.

The TDDP Monitoring and Coordination Committee:

- See responsibilities described in Section 8 – Coordination and Monitoring.
- The MCC shall provide a meaningful platform for local stakeholders to integrate and participate in the planning, development and management of tourism, in the tourism destination of Dangriga in line with the implementation of the NSTMP, and the Dangriga TDDP.

8. Coordination and Monitoring

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

- Establish a TDDP Monitoring and Coordination Committee (MCC). This Committee will be comprised of individuals who represent the various tourism development interests of the destination and will be selected from among the individuals who participated in the planning process (that is, representatives from among the private, public and civil sector). Representatives of the BTB and the Ministry of Tourism will also sit on the committee.
- The primary purpose of the committee would be to champion the implementation of the TDDP by providing leadership for and champion the sustainable development and management of the destination in accordance with the TDDP.
- Specifically, the MCC will be charged with the following: 1) Monitor the progress of the TDDP based on the identified indicators, 2) Provide recommendations to the BTB and Ministry of Tourism for improving the implementation of the TDDP, 3) Report on progress of the TDDP to the BTB and Ministry of Tourism, and 4) Meet every two months.
- The MCC will be commissioned for the duration of the TDDP – in other words, during the 5-year TDDP implementation timeframe.
- The MCC will establish a set number of participants in order to make the process manageable. Committee membership should be no more than 9 to 11 regular participants representing the various sectors of the destination (e.g., hotels, restaurants, tour operators, site managers, town council, government agencies, etc.).
- The MCC should have the following structure: 1) a Chairperson, 2) Vice Chairperson, 3) a Secretary (BTB or MTCA – ex-officio), two Councillors (representing Private Sector), two Councillors (representing Local Public Sector), two Councillors (Representing Civil Sector), and two at-large members.
- The MCC will ensure that committee representation includes individuals from the BTB and Ministry of Tourism as ex-officio members.

- The MCC Chairperson and the BTB/Ministry of Tourism focal point make a note of unfinished objectives (shortfalls), needs for readjustments of outcomes and target dates (reforecasts), meetings to be called, etc., on a bi-monthly basis.
- The MCC Chairperson and the BTB/Ministry of Tourism focal point document progress of TDDP implementation in a brief memorandum on a quarterly basis to all TDDP MCC members.
- The TDDP is to be generally monitored through quarterly internal review sessions, annual review sessions, and a mid-term evaluation.
- Based on the results of the annual review, a revised action plan will be developed for the upcoming year.
- The progress of TDDP implementation is to be evaluated at annual MCC meetings. Such evaluation may need to be facilitated by an external consultant. The evaluation results will be shared via public media to keep the wider community informed.

9. Strategies and Monitoring Indicators for Success

The following table shows the strategic priorities and objectively verifiable indicators for the Dangriga TDDP.

Strategies	Monitoring Indicators
Strategy 1 Enhance community awareness	<ul style="list-style-type: none"> • % of residents with knowledge about the benefits of tourism • Number of cultural groups that access technical & financial support • % increase in the number of events/shows/activities hosted by cultural groups • % increase in the number of formal cultural groups
Strategy 2 Enhance critical infrastructure that supports tourism	<ul style="list-style-type: none"> • Increase in number and use of community infrastructure • % of tourism assets demarcated
Strategy 3 Develop cultural heritage and cultural attractions and experiences	<ul style="list-style-type: none"> • % increase in the number of events/shows/activities hosted by cultural groups • Increase in number and variety of artisan products available in the destination
Strategy 4 Diversify marine and terrestrial-based attractions and experiences	<ul style="list-style-type: none"> • % increase in the number and variety of tourism product offers in the destination • Number of tourism businesses registered
Strategy 5 Strengthen local capacity in tourism services	<ul style="list-style-type: none"> • Number of women/men/youths who receive tourism training • Number of specialized training conducted

Strategies	Monitoring Indicators
<p>Strategy 6</p> <p>Create a destination brand for Dangriga</p>	<ul style="list-style-type: none"> • Increase awareness about Dangriga's destination brand • Number of promotional items that mention the destination • Social media reach • Destination promotional messages that represent local communities and visitors authentically and respectfully • Increase in the number of visitors to the destination

10. Implementation Schedule

The following table shows the timetable for accomplishing the strategic priorities of the Dangriga TDDP. It includes the strategic objectives, key activities, timeframe broken down by year and quarters, and responsible party. A budget for these activities will be developed on an annual basis by the responsible parties when more detail tasks are developed.

STRATEGIC OBJECTIVES	KEY ACTIVITIES	TIMEFRAME																				RESPONSIBLE PARTY	
		2019 - 2024																					
		Y1				Y2				Y3				Y4				Y5					
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4		
1. Enhance community awareness	a. Develop & implement a tourism promotional campaign	X	X	X	X	X	X																BTB
	b. Documenting the Cultural Heritage and Culture of Dangriga			X	X	X	X																NICH
	c. Garifuna culture retention (school for music, dance, food, etc.)			X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	NICH/MOE
2. Enhance critical infrastructure that supports tourism	a. Stann Creek River Bank improvement		X	X	X	X																	BTB/Dangriga Town Council
	b. Havana Creek Enhancement													X	X	X	X						Dangriga Town Council
	c. Pier Re-development													X	X	X	X						Dangriga Town Council

	d. Y-not Island improvement																	X	X	X	X	Dangriga Town Council
	e. Beach enhancement		X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	Dangriga Town Council
	f. Provide adequate and standardized signage	X	X	X	X																	BTB
	g. Improve town lighting in key areas					X	X	X	X													Dangriga Town Council
	h. Provide public resting areas and restroom facilities					X	X	X	X													Dangriga Town Council
	i. Develop urban zoning plan						X	X	X	X												Dangriga Town Council
3. Develop cultural heritage and cultural attractions and experiences	a. Defining iconic aspects of cultural heritage and culture					X	X															BTB
	b. Enhance the Gulisi Garifuna Museum								X	X	X											NICH
	c. Expand cultural events and festivals			X	X	X	X	X	X	X	X											NGC
	d. Develop local crafts and souvenirs				X	X	X															NICH
4. Diversify marine and terrestrial-based	a. Provide training in safety for tour operators and tours guides						X	X	X													BTB

SECTION 3: APPENDICES



Appendix 1 – The TDDP Planning Process

Methodology

The consultancy assignment was executed via three main technical phases:

1. Preparatory phase;
2. Data collection phase; and
3. Analysis and Reporting phase.

Preparatory Phase

The Preparatory Phase covered the necessary advance pre-fieldwork activities including negotiation and finalization of TOR scope and methodology with the Belize Tourism Board (BTB), planning and scheduling data collection activities, and data collection instrument development.

Data Collection Phase

The Data Collection Phase included the collection of secondary data from relevant industry documents while primary data was collected through key stakeholder interviews, focus group discussions (FGDs), and planning sessions with important tourism destination and industry stakeholders. Further details of the data collection activities are provided below.

Literature Review and Tourism Diagnosis

The Consultants collected and reviewed relevant documentation regarding the tourism industry in the Dangriga destination with the objective of understanding critical aspects of the industry including the tourism market (demand, supply and competitors), institutional and regulatory framework, investment needs and potential, and tourism value chain linkages.

The tourism diagnosis for the destinations was mainly based on a compilation and desk-top review of available information, such as the National Sustainable Tourism Master Plan, protected areas management plans, Dangriga Municipal Development Plan, and BTB and SIB tourism statistics (arrivals, hotel occupancy, length of stay, etc.), among others.

Initial Meeting

An initial meeting was conducted with key Dangriga tourism stakeholders. The primary purpose of the initial meeting was to inform the destinations' tourism stakeholders about the consulting assignment and the need for their participation and involvement in developing the destination's plan. During the initial meeting, the

following activities occurred: 1) stakeholders were introduced to the consulting team, 2) the assignment's work plan was presented, 3) presentation of and discussion on a preliminary destination diagnosis, 4) identification of some of the destination's significant assets, and 5) categorization of tourism stakeholders into sub-sectors and associated groups. Table 16 shows the sub-sector categorization of tourism stakeholders.

TABLE 21: STAKEHOLDER SUB-SECTORS

Sector	Group
Culture	Artisans, Dancers, Music, Assns.
Hoteliers /Food & Beverage	Registered hotels, Bars, Restaurants,
Tour Guides/Operators	Registered guides & operators
Public Entities/ Site Managers/ Transportation/ Media	Safety & Security, Public Health, Town/Village Council, BTB, MOT, NICH, Trainers, Forestry, Archaeology, NGOs, Radio Stations, BTIA, Fisheries, PA Managers

See Appendix 4.1 for the list of participants at the initial meeting.

Focus Groups and Key Interviews

In order to become familiar with the political, economic, socio-cultural, technological, ecological and legal factors that affect the tourism industry, the consultant engaged in discussions through focus group sessions with destination stakeholders. The focus group discussions (FGDs) format was used to conduct an external environmental scan (or PESTEL Analysis) that yielded valuable information about the external environment within which strategic destination planning took place. Four focus group sessions were conducted over a two-day period with representation from the various sub-sectors outlined in Table 16 above. See Appendix 4.2 for the list of focus group participants.

In addition to destination specific information collected during the FGDs, the consultant also collected and documented relevant contextual information as part of finalizing the external environmental scan.

This was the first step of the planning process, and it set the foundation for the other steps in the planning process.

Planning Sessions

The selection of participants for the planning sessions was based on sub-sector representations. During the FGDs, participants were asked to nominate two representatives from their respective sub-sector to participate in the planning sessions. In the case of sub-sector 4 (Public Entities/ Site Managers/ Transportation/ Media) however, one representative participated for each area as this subcategory is comprised of multiple sub-sectors.

- **First Planning Session (1 day)**

Step 1: The first planning session (one day) commenced with a validation of the results of the PESTEL analysis conducted during the FGDs.

Step 2: A SCOT analysis (Strengths, Challenges, Opportunities and Threats), was then conducted to finalize the environmental scan.

Step 3: A problem analysis was conducted to identify what the main problems are and to establish the cause and effect relationships between these problems. The key purpose of this analysis was to ensure that 'root causes' are identified and subsequently addressed in the TDDP, not just the symptoms of the problem(s).

- **Second Planning Session (1 day)**

Step 4: Using the results of the environmental scan (PESTEL & SCOT) and problem tree, a visioning exercise was conducted in order to brainstorm ideas regarding the future direction of tourism in the Destination.

Step 5: Strategic objectives and associated activities were then identified and discussed.

Analysis & Reporting Phase

The Analysis and Reporting Phase involved gathering all data results and sorting the data into categories related to the TOR requirements. This information was then analysed and used to support to develop the first draft of the TDDP for Dangriga. A half-day session was then conducted with stakeholders at the destination to validate the main elements of the draft plans before it was amended and submitted to the BTB for final approval

Appendix 2 – Asset Readiness Rating Criteria

The asset readiness rating criteria is a tool designed to measure the tourism readiness of an asset. An initial step in conducting the assessment is to determine whether an asset meets the minimum criteria shown in Box 5.

Box 5: MINIMUM CRITERIA FOR TOURISM ASSETS

Minimum Criteria for Tourism Assets

1. Must be in compliance with all of Belize's national and local laws and regulations
2. Must have public access to asset
3. Must have consistent hours of operations
4. Must have contact information (phone, email, etc.)

If the minimum criteria are not satisfied, the asset is automatically considered inadequate for tourism. On the contrary, if the minimum criteria are satisfied, then the asset should be further assessed using the scoring sheet matrix below.

Each tourism asset is assessed

based on a 10-point horizontal scale. Points from 1 to 10 are awarded for each Area of consideration based on a set of Standards identified as being relevant for the respective Areas. Using the scoring sheet, the awarded points are multiplied by the weighted points to arrive at the total score for the respective Area. The sum of each Area points yields a total score for the asset. This total score is the asset's rating out of 100 points.

Box 6: MINIMUM CRITERIA FOR TOURISM ASSETS

Asset Rating Range

Optimal	-	From 80 to 100 points
Moderate	-	From 61 to 79 points
Limited	-	From 41 to 60 points
Inadequate-		From 0 to 40 points

Box 6 shows the asset rating range. The results of the asset rating determine whether it is considered optimal, moderate, limited, or inadequate for tourism.

SCORING SHEET

Name of Asset	Visitor & Community Benefits	Governance/ Management Structure	Safety & Security	Accessibility	TOTAL
	() X3.0 =	() X 3.0 =	() X 2.0 =	() X 2.0 =	
	() X3.0 =	() X 2.0 =	() X 2.0 =	() X 2.0 =	
	() X3.0 =	() X 2.0 =	() X 2.0 =	() X 2.0 =	
	() X3.0 =	() X 2.0 =	() X 2.0 =	() X 2.0 =	
	() X3.0 =	() X 2.0 =	() X 2.0 =	() X 2.0 =	
	() X3.0 =	() X 2.0 =	() X 2.0 =	() X 2.0 =	

CRITERIA DESCRIPTION

Area	Standards	Weight (points)
Visitor & Community Benefits	<ol style="list-style-type: none"> 1. System to monitor and publicly report visitor satisfaction in place. (3 points) 2. Must demonstrate local community benefits. (3 points) 3. Measures in place to preserve, protect, and enhance natural and cultural assets. (2 points) 4. Must engage in eco-friendly tourism practices. (1 point) 5. Of the total employee base, at least 80% must be resident or Belize national. (1 point) 	3.0

Area	Standards	Weight (points)
Governance/ Management Structure	<ol style="list-style-type: none"> 1. Operations must be linked to the goals of the National Sustainable Tourism Master Plan. (3 points) 2. Must be linked to Belize's tourism product. (2 points) 3. Must have some management system in place. (2 points) 4. Must have a business plan. (1 point) 5. Must have an online presence (either web-based or social media based). (1 point) 6. Must have restroom facilities for multiple genders. (1 point) 	3.0
Safety & Security	<ol style="list-style-type: none"> 1. Crisis and emergency response plan that is appropriate to the asset. (3 points) 2. Must demonstrate a commitment to guest safety and satisfaction. (3 points) 3. Must have appropriate signage. (2 points) 4. Must have appropriate lighting at access points. (2 points) 	2.0
Accessibility	<ol style="list-style-type: none"> 1. Have graded road and or water access. (5 points) 2. Have parking and or docking facilities. (5 points) 	2.0

Dangriga 3 – Dangriga Tourism Assets

I = Inadequate Readiness; L = Limited Readiness; M = Moderate Readiness; O = Optimal Readiness

Dangriga Assets	Description of Assets	Tourism Purpose	Tourism Readiness
Natural Tourism Resources			
1.1 Maya Mountains	<ul style="list-style-type: none"> Range of hills mostly in southern Belize, extending about 70 miles (115 km) north-eastward from across the Guatemalan border into central Belize. The range falls abruptly to the coastal plain to the east and north but more gradually to the west, becoming the Vaca Plateau, which extends into eastern Guatemala. Both the range and the plateau are extensively dissected and of uniform elevation throughout, the highest points being reached at Doyle's Delight (3,688 feet [1,124 metres]) and Victoria Peak (3,680 feet [1,122 metres]) in the transverse Cockscomb Range, which extends seaward perpendicularly from the main divide. 	<ul style="list-style-type: none"> Actual 	<ul style="list-style-type: none"> M
1.2 Victoria Peak	<ul style="list-style-type: none"> Situated in the Cockscomb Basin Wildlife Sanctuary and is the second highest mountain in Belize. Was pronounced a natural monument in 1998. Dry Season/Permits needed by the Forestry Department. Contains nature trails and hiking paths. 	<ul style="list-style-type: none"> Actual 	<ul style="list-style-type: none"> M

Dangriga Assets	Description of Assets	Tourism Purpose	Tourism Readiness
1.3 Beach	<ul style="list-style-type: none"> The beach and nearshore benthic substrate (sea bottom sediments) are composed of terrigenous sands (from rivers and shore erosion) and silts with no coarse sand component. The benthic ecosystem includes sand and mud bottom epifaunal (surface) and infaunal (organisms that live in tubes or burrows beneath the surface of the sea- floor) communities, seagrass banks and degraded coral patch reefs. 	<ul style="list-style-type: none"> Potential 	<ul style="list-style-type: none"> L
1.4 Atolls	<ul style="list-style-type: none"> Glover's Reef Atoll: Located approximately 45kms off the coast of Belize. The atoll was established in 1993 and designated by UNESCO as one of the seven protected areas in the Belize Barrier Reef System. 	<ul style="list-style-type: none"> Actual 	<ul style="list-style-type: none"> O
1.5 San Jose Lagoon	<ul style="list-style-type: none"> Located north of Dangriga Town and is home to numerous morelet's crocodiles and tarpon fish. 	<ul style="list-style-type: none"> Potential 	<ul style="list-style-type: none"> L
1.6 Tobacco Caye	<ul style="list-style-type: none"> Lies within the South Water Caye Marine Reserve about 10 miles east of Dangriga. Approximately three acres (1.2 hectares) in the area, shaped like an egg, with a north-south dimension of about 240 m (260 yds) and an east-west dimension of 125 metres (137 yards). Privately owned and used for fly-fishing, diving, and camping. 	<ul style="list-style-type: none"> Actual 	<ul style="list-style-type: none"> M
1.7 Coco Plum Caye	<ul style="list-style-type: none"> Private island off the coast of Belize featuring a total of 18 private oceanfront cabanas. 	<ul style="list-style-type: none"> Actual 	<ul style="list-style-type: none"> O
1.8 Billy Hawk Caye	<ul style="list-style-type: none"> Privately island Located 14 miles southeast of Dangriga Snorkelling area Used to conduct Biological Classes 	<ul style="list-style-type: none"> Actual 	<ul style="list-style-type: none"> O
1.9 Sand Fly Caye	<ul style="list-style-type: none"> Private island 	<ul style="list-style-type: none"> Actual 	<ul style="list-style-type: none"> M

Dangriga Assets	Description of Assets	Tourism Purpose	Tourism Readiness
	<ul style="list-style-type: none"> Located 8.5miles from Dangriga town 		
1.10 Man-O-War Caye	<ul style="list-style-type: none"> Designated bird sanctuary Man-O-War Caye 3 different types of mangrove vegetation provide sanctuary to a variety of indigenous bird species, including Pelicans, Brown Booby birds, and the Magnificent Frigatebirds (also known as Man-O-War birds). Located close to South Water Caye. 	<ul style="list-style-type: none"> Actual 	<ul style="list-style-type: none"> O
1.11 North Stann Creek River	<ul style="list-style-type: none"> 40 miles long and made up of two main branches; south and north that joins behind Steadfast Village. The south branch originates in Sittee Forest Reserve and the north branch in the Cayo/Stann Creek border. The Kent River is a smaller tributary that joins the north branch at Middlesex. Rive empties out in Dangriga Town. Freshwater access meeting bar mouth. (Unique Area) 	<ul style="list-style-type: none"> Potential 	<ul style="list-style-type: none"> I
1.12 Salt Creek	<ul style="list-style-type: none"> Located in Dangriga. The estimate terrain elevation above sea level is 3 meters. 	<ul style="list-style-type: none"> Potential 	<ul style="list-style-type: none"> I
1.13 Freshwater Creek	<ul style="list-style-type: none"> Located near Silk Grass Village. The estimate terrain elevation above sea level is 15 metres. Historical - Mud to make houses and temples and trees for fire heart. Used by local hunters. 	<ul style="list-style-type: none"> Potential 	<ul style="list-style-type: none"> I
1.14 Angel's Falls	<ul style="list-style-type: none"> Located 26 Miles on Hummingbird Highway. Also known as "the gap". 	<ul style="list-style-type: none"> Actual 	<ul style="list-style-type: none"> M
1.15 Davis Falls	<ul style="list-style-type: none"> Located on mile 14.5 on the Hummingbird Highway near Dangriga Town. 	<ul style="list-style-type: none"> Actual 	<ul style="list-style-type: none"> M

Dangriga Assets	Description of Assets	Tourism Purpose	Tourism Readiness
	<ul style="list-style-type: none"> Davis Falls is one of the most iconic natural attractions in the country with a total height of around 500 feet (120 meters). 		
1.16 Macaroni Hills Cave	<ul style="list-style-type: none"> System of Caves located on mile 11 on the Humming Bird Highway. 	<ul style="list-style-type: none"> Actual 	<ul style="list-style-type: none"> L
1.17 Cockscomb Basin Wildlife Sanctuary	<ul style="list-style-type: none"> Nature reserve established 1986 to protect the forests, fauna and watersheds of an approximately 400 square kilometres (150 sq mi) area of the eastern slopes of the Maya Mountains. First protected area for protection of the jaguar (<i>Panthera onca</i>). Co-managed by Belize Audubon Society. Comprised of two adjacent geographic basins. The West Basin is drained by the Swasey Branch, which is one of the main tributaries to the Monkey River. The East Basin consists of the upper watershed of South Stann Creek. The reserve is generally lozenge-shaped, spanning an east-west dimension of approximately 36 km (22 mi) and a north-south dimension of approximately 14 km (9 mi). Elevation extremes are 50 m (160 ft) above sea level in the lower reaches of South Stann Creek to 1,160 m (3,810 ft) atop Victoria Peak. The West Basin is bounded by the ridge of the Maya Mountains on the west, Cockscomb Mountains on the north, a prominent transverse ridge of the Maya Mountains at the south (of about elevation 1,000 m (3,300 ft)) and a low-lying north-south ridge at the east, which separates the West from East Basin. The Swasey Branch exits through the south transverse range via a deep 300 m (980 ft) gorge. The East Basin is also bounded on the north by the namesake Cockscomb ridge, to the west by the low-lying north-south 	<ul style="list-style-type: none"> Actual 	<ul style="list-style-type: none"> M

Dangriga Assets	Description of Assets	Tourism Purpose	Tourism Readiness
	<p>ridge separating the two basins, to the east by Cabbage Haul Ridge and to the south by Stann Creek Ridge. South Stann Creek flows out of the East Basin on the south.</p> <ul style="list-style-type: none"> • Trails, River Tubing, Camping, Birding. 		
1.18 Gra Gra Lagoon National Park	<ul style="list-style-type: none"> • National Park established in 2002 that is located near the coast just below the town of Dangriga. • Co-managed by Friends of Gra Gra Lagoon. • The park covers approximately 1,197 acres (485 ha). • The very shallow brackish lagoon of 300 acres (120 ha) is the centerpiece of the park, but the protected area also includes the more significant part of the surrounding mangrove system, excepting that on the seaward (southern) shore. The mangrove grades into swamp forest and lowland forest on the inland (northern) side. There are patches of tall herbaceous swamp behind the beach-crest close and entering the park boundary and large areas of freshwater reed swamps within the forested swamplands. • Near freshwater and allows for fishing and Bird watching. 	<ul style="list-style-type: none"> • Potential 	<ul style="list-style-type: none"> • L
1.19 Mayflower Bocawina National Park	<ul style="list-style-type: none"> • National Park established in 2001; this national park boasts a vast quantity of Flora and Fauna. • Co-managed by Mayflower Bocawina Environmental Development Group. • Lies about 16 miles southwest of Dangriga and 12 miles northwest of Dangriga. • 11-sq-mile park of the jungle, mountains, waterfalls, walking trails, swimming holes and small Maya sites 	<ul style="list-style-type: none"> • Actual 	<ul style="list-style-type: none"> • O
1.20 South Water Caye Marine Reserve	<ul style="list-style-type: none"> • Second largest marine reserve established 1996 covering 117,875 acres (approximately 47,700 hectares). • Managed by Fisheries Department. 	<ul style="list-style-type: none"> • Actual 	<ul style="list-style-type: none"> • O

Dangriga Assets	Description of Assets	Tourism Purpose	Tourism Readiness
	<ul style="list-style-type: none"> The sheltered waters and mangrove systems of the Pelican cays in the southern area of the Marine Reserve have been identified as one of the most biodiverse marine systems within the western hemisphere, supporting a number of endemic species, and species new to science. 		
1.21 Glover's Reef Marine Reserve	<ul style="list-style-type: none"> Marine reserve established in 1993 located off the southern coast of Belize, approximately 45 kilometers from the mainland. It forms part of the outermost boundary of the Belize Barrier Reef. Managed by the Fisheries Department. The oval-shaped atoll is 32 km (20 mi) long and 12 km (7.5 mi) wide. The interior lagoon is dotted with around 850 reef patches and pinnacles rising to the surface. Major Cayes include Amounme Point Cay, Northeast Cay, Long Cay, Middle Cay and Southwest Cay. 	<ul style="list-style-type: none"> Actual 	<ul style="list-style-type: none"> M
1.22 Billy Barquedier National Park	<ul style="list-style-type: none"> Billy Barquedier National Park encompasses 1,639 acres of preserved tropical evergreen forest. Co-managed by Steadfast Tourism and Conservation Association. It sits on Santa Rose metasedimentary rocks and featuring a spectacular waterfall. Located between two watersheds, Mullins River watershed (north) and Stann Creek watershed (South). It is also situated new the Manatee Forest Reserve (part of the foothills of the Maya Mountain Massif). 	<ul style="list-style-type: none"> Actual 	<ul style="list-style-type: none"> M
1.23 Home to numerous animal species	<ul style="list-style-type: none"> Jabiru Stork Peccary White-tailed Deer 	<ul style="list-style-type: none"> Actual 	<ul style="list-style-type: none"> O

Dangriga Assets	Description of Assets	Tourism Purpose	Tourism Readiness
	<ul style="list-style-type: none"> Numerous bird species 500+ Howler monkey & Spider monkey Tapir Cat Species (Jaguar, Puma, Jaguarondi, Ocelot & Margay) Morelet's Crocodile Gibnut & Agouti Numerous fish species (Tarpon, Bonefish, Permit, Snook, Tarpon...etc.) 		
CULTURAL AND HERITAGE RESOURCES			
6.1 Dangriga Town	<ul style="list-style-type: none"> Capital, the administrative and commercial center of the Stann Creek District. Located on the Caribbean coast at the mouth of the North Stann Creek River, 90 miles away from Belize City. Several monuments and historical buildings that include: Thomas Vincent Ramos Monument next to the junction of Commerce and Front Street; the Drums of Our Fathers Monument and the Gulisi Garifuna Museum. Pen Cayetano Studio Gallery 	<ul style="list-style-type: none"> Actual 	<ul style="list-style-type: none"> M
6.2 Gulisi Museum	<ul style="list-style-type: none"> Garifuna Museum that brings together artefacts, pictures and documents on Garifuna history and culture, including an exhibit on the life and music of the late Garifuna musician Andy Palacio. This museum is 2 miles out of Dangriga Town. 	<ul style="list-style-type: none"> Actual 	<ul style="list-style-type: none"> O

Dangriga Assets	Description of Assets	Tourism Purpose	Tourism Readiness
6.3 Garifuna People	<ul style="list-style-type: none"> The Garifuna people are Indigenous of mixed-race descendants of West African, Central African, Island Carib, European and Arawak people. Since 1797, the Garinagu people have inhabited Central America, along with the coast of Honduras, Belize, Guatemala and Nicaragua. Arrived in these areas after being exiled from St. Vincent, an island in the Lesser Antilles. 	<ul style="list-style-type: none"> Actual 	<ul style="list-style-type: none"> O
6.4 Garifuna Cuisine	<ul style="list-style-type: none"> Garifuna meals mainly incorporate ground vegetables, plantains, seafood and coconut milk. Most commonly known Garifuna dish is ereba (cassava bread) which is made from grated cassava root. Cassava bread is eaten with fish, machuca (pounded green and ripe plantains), hudut (fish soup), or bundiga. 	<ul style="list-style-type: none"> Actual 	<ul style="list-style-type: none"> O
6.5 Creole Cuisine	<ul style="list-style-type: none"> The Creole is one of the main ethnic groups in Belize. Among the main staples of a Creole, dinner is rice and beans with some type of meat and a salad or coleslaw. There is sometimes the incorporation of seafood. Other types of Creole Cuisine are inclusive of Creole bread; fry jacks, and boil up. 	<ul style="list-style-type: none"> Actual 	<ul style="list-style-type: none"> O
6.6 Creole Drumming	<ul style="list-style-type: none"> Gales Point Sambai (Afro Belizean) 	<ul style="list-style-type: none"> Actual 	<ul style="list-style-type: none"> M
PURPOSE BUILT RESOURCES			
1. Citrus Processing Factory	<ul style="list-style-type: none"> Processing of citrus within the Belize Citrus Industry is done by the Citrus Products of Belize Ltd. There are currently two mills located on the Stann Creek Valley Road. 	<ul style="list-style-type: none"> Potential 	<ul style="list-style-type: none"> L

Dangriga Assets	Description of Assets	Tourism Purpose	Tourism Readiness
	<ul style="list-style-type: none"> The Mill purchases citrus (orange, grapefruit, & lime) and pineapples from farmers for the purpose of manufacturing juice concentrates and other byproducts. 		
2. Marie Sharp Factory	<ul style="list-style-type: none"> Is a sauce and juice manufacturer based just outside Dangriga Town. The company is named after its founder Marie Sharp and is most known for its habanero pepper hot sauce. 	• Potential	• L
3. Sabal's Cassava Factory	<ul style="list-style-type: none"> Located within Dangriga. A family-owned business that produces traditional Garifuna snacks from the cassava tuber. 	Potential	L
EVENTS			
1. Annual Festivals	<ul style="list-style-type: none"> Garifuna Settlement Day (November 19) Dangriga Day Wanaragua Festival Chaka & Turtle shell Festival Cassava Festival Punta and Paranda Festival 	• Actual	• O

Appendix 4 – Meeting Participants

Appendix 4.1 Initial Meeting

Dangriga Initial Stakeholder Meeting – May 30th, 2018

NAME	ORGANIZATION	POSITION	CONTACTS
Dunia Cordon	Toucan Ridge Ecology Education Society (T.R.E.E.S)	Hospitality Manager	622 1170
Jesuiter Perez	BTIA Dangriga	BTIA Assistant	608 3553
Carlene Sanchez	BTIA Dangriga	Secretary	634 9483
Tyson Johnson	Lumalali Garifuna Group	Manager	620 3997
Aaron Gongora	Dangriga Town Council	Councillor	625 3950
Augustine Flores	Pots on the Beach	Manager	522 2095
David Geban	Joe Jo's by the Reef	Manager	570 5520
George Roast	Pelican Beach Roast	Manager	6623 9346
Tiresie Lino	SCEJC	Lecturer	630 7866
Shanna Taylor	SCEJC	Lecturer	604 2701
Gilbert Swaso	Tuani Garifuna	Manager	670 8297
Dayaan Ellis	Garifuna Heartbeat	Owner	664 1370
Rebecca Rath	Pelican Beach Resort	Manager	522 2044
Bryant Williams	James Bus Line	Owner	671 2756
David Obi	CD's Treasurer	Owner	602 3077
Joshua Arana	NICH	Coordinator	522 0434
Ifasina Efunyemi	SCEJC	Lecturer	633 7962
Lynette Rodriguez	NGC Dangriga	Councilor	628 3650
Chadwick Usher	Chaleanor Hotel	Owner	671 5214
Eleanor Usher	Chaleanor Hotel	Owner	600 0617

Tyrone Nunez	Gingine Tours Charter	Owner	600 7940
Alden Chavez	Gingine Tours Charter	Owner	630 1945
Ernest Peters	Universal Images	Manager	628 6097
Cyril Sabal	Sabal Food Product	Manager	627 6136/532 2067

Appendix 4.2 Focus Groups

Dangriga Focus Group – July 12th, 2018 – Hoteliers/Restaurants/ Tour Operators /Guides

NAME	ORGANIZATION	POSITION	CONTACTS
Chad & Eleanor Usher	Chaleanor Hotel	Managers	522 2587
Dana Joseph	D's Hostel	Owner/Manager	502 3324
Roselia Zabaneh	Blue Marlin Beach Resort	Reservations & Sales Manager	522 2243/634 9483
Ilana Smith	Bonefish Hotel	Assistant Manager	522 2243
Gilbert Swazo	Tuani Garifuna	Owner/ Manager	670 8297
George Roast	Pelican Beach Resort	F&B Manager	629 9346
Andy Aspinall	Belize Adventure Tours	General Manager	676 7676
Marlon Flores	Cultural Icon Belize	Owner	630 6806
David Gonzalez	Mayan World Destinations	Manager	670 1534
Alton Sabal	Tour Guide	Free Lance	667 5354

Dangriga Focus Group – July 12th, 2018 – Public/ Culture Sector

NAME	ORGANIZATION	POSITION	CONTACTS
Dr. Karen Martinez	Ecumenical Junior College	Dean	628 3500
Leslie Wade	Police	Superintendent	615 6432
Jamal Swazo	Youth Rise	Assistant Project Coordinator	602 1884
David Obi	CDs Transfer	Owner	602 3077
Tyson Johnson	Lumalali Garifuna	Owner/ Manager	620 3937

NAME	ORGANIZATION	POSITION	CONTACTS
Ifasina Efunyemi	NGC/POWA	Treasurer/Co-founder	633 7962
Roy Cayetano	National Garifuna Council	Director	610 1860
Vanessa Cassanova	Creole Council/Ecumenical High school	Member/Teacher	614 6161
Nadia Caliz	Creole Council/Ecumenical High school	Member/Teacher	621 9676
Michelle Irving	POWA	Coordinator	622 8671
Myrick Caliz	Creole Council	Member	626 4417

Dangriga Planning Session – August 16th, 2018

NAME	ORGANIZATION	POSITION	CONTACTS
Dana Joseph	D's Hostel	Owner/Manager	502 3324
Russell Murray	Tuani Garifuna	Accounts Clerk	502 0287
Marlon Flores	Cultural Icon	Owner	630 6806
David Gonzales	Mayan World Destination	Director	670 1534
Leslie Wade	Police Dept.	Superintendent	615 6432
Jamal Swazo	Youth Rise	Assistant Project Coordinator	602 1884
David Obi	Musician	Owner	602 3077
Vanessa Cassanova	Creole Council	Member	650 6161
Nadia Caliz	For the People Jancunu Group	Owner	621 9676
Myrick Caliz	For the People Jancunu Group	Owner	626 4417
Cyril Sabal	Sabal Food Product	Manager	627 6136
Alex Joseph	Dangriga Town Council	Deputy Mayor	610 8525

Yure Roberts	Belize Tourism Board	Destination Planning Manager	635 6945
Danielle August	Belize Tourism Board	Destination Planning Coordinator	605 4939

Dangriga Planning Session – August 17th, 2018

NAME	ORGANIZATION	POSITION	CONTACTS
Dana Joseph	D's Hostel	Owner/Manager	502 3324
Carlene Sanchez	Bonefish Hotel/ BTIA Dangriga	Secretary	522 2243
Marlon Flores	Cultural Icon	Owner	630 6806
David Gonzales	Mayan World Destination	Director	670 1534
Jamal Swazo	Youth Rise	Assistant Project Coordinator	602 1884
Vanessa Cassanova	Creole Council	Member	650 6161
Nadia Caliz	For the People Jancunu Group	Owner	621 9676
Myrick Caliz	For the People Jancunu Group	Owner	626 4417
Michelle Irving	POWA	Coordinator	622 8671
Aron Gongora	Dangriga Town Council	Councilor	625 3953
Yure Roberts	Belize Tourism Board	Destination Planning Manager	635 6945
Danielle August	Belize Tourism Board	Destination Planning Coordinator	605 4939

Belize & Belmopan City Key Stakeholder Interviews – August, 2018

NAME	ORGANIZATION	POSITION
Amanda Acosta	Belize Audubon Society	Executive Director
Abil Castaneda	MTCA	Chief Tourism Officer
Noriko Gamero	BTB	Director Destination & Planning Cruise Relations
Ishmael Quiroz	Economic Development Council	Executive Director
George Thompson	Institute of Archeology	Director

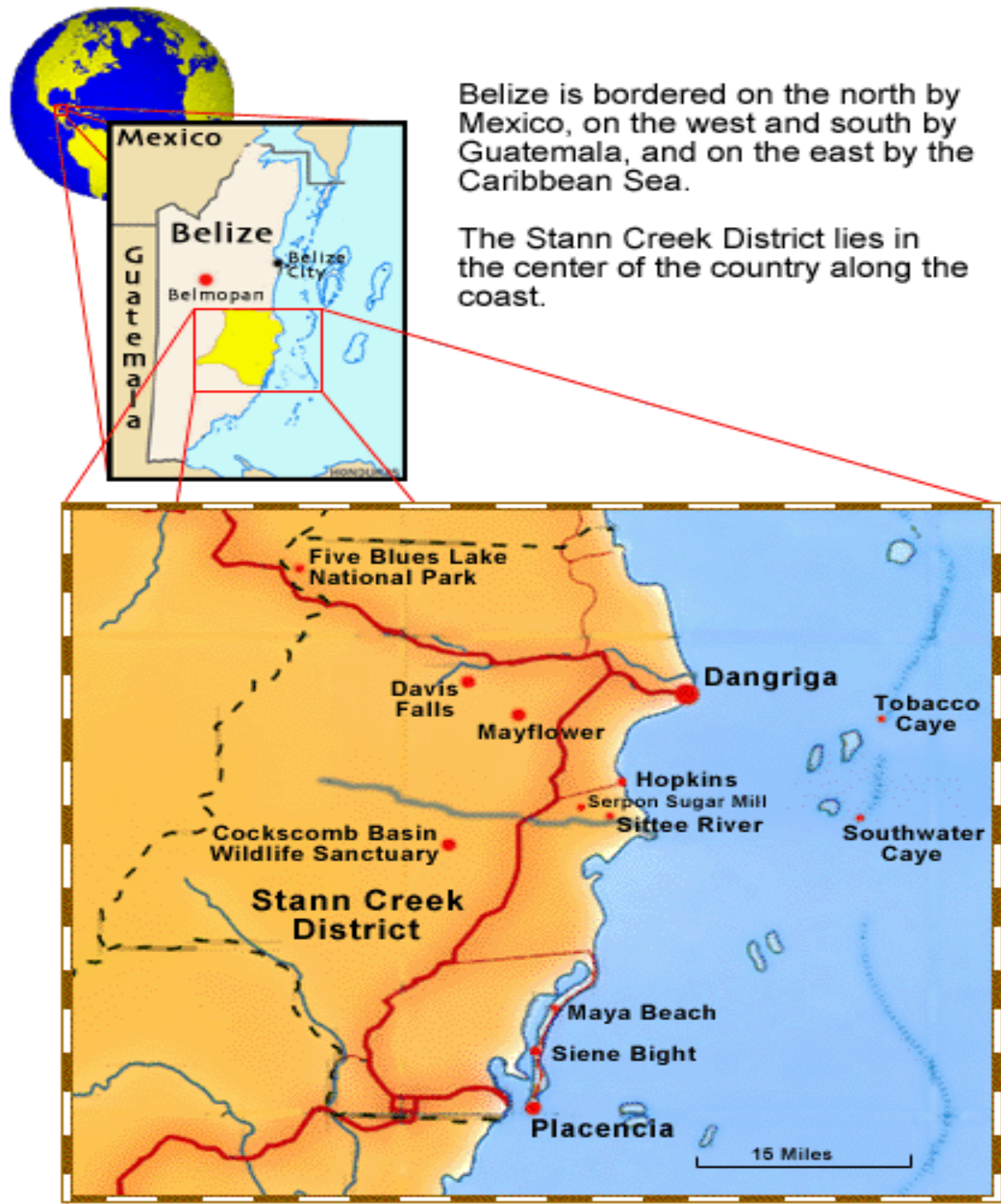
Dangriga Validation Session – November 1st, 2018

NAME	ORGANIZATION/POSITION	CONTACTS
Deshia Martinez	Dangriga Central Hotel/ Receptionist	625 6899
Lisa Mullahy	ReefKeeper Belize /Director & Education Mgr.	mulcahyt@hotmail.com /671 0572
Margaret Vernon	Conch & Fish Fest. / Planner	mulcahyt@hotmail.com /667 4381
Solomon Lopez	Jean's Place/ Owner	653 0212
David Obi	CD's Tours,Music/ Owner	602 3077
Tanisha Saldano	Tuani Garifuna/ Supervisor	624 3084
Francis Marin	NGC / Member	667 0255
Jescuter Perez	B.T.I.A Dangriga/ Information Officer	608 3553
Rosalba Flores	B.T.I.A Dangriga / Information Officer	633 9737
Rodwell Ferguson Jr.	Untamed Belize / Owner	untamebelize@gmail.com / 671 5281
Marlon Flores	Cultural Icons / Owner	culturaliconbelize@gmail.com /630 6806
Russel Murray	Freelance/ BTIA Member	633 2145 / 672 2145
Aaron Gongora	Town Council / Councilor	625 3953

Flora Hernandez	Flora Isabel Chocolate Bze / Owner	631 9578/ 625 5288
David Gonzalez	Mayan World/ Manager	mayanworldbelize@gmail.com /670 1534
Rosella Zabaneh	BTIA/Blue Marlin/Owner-Chair	610 5789
Ingrid Cayetano	Pen Cayetano Studio/ Owner-Manager	628 6807
Fidelis Gentle	Ninja Mac Rentals/ Manager	fidelisgentle@gmail.com /670 9611
Nadia Caliz	Ecumenical Highschool/HOD Social Science	nbmcaliz@gmail.com /621 9676
Vanessa Cassanova	Ecumenical Highschool/HOD Business	ocassanova191@gmail.com / 650 6161
Cyril Sabal	Sabal Food/ Manager	627 6136
Ernest Sabal	Sabal Food/ Employee	632 8980
Karen Lagos	Chaleanor Hotel/ Manager	633 2438 / 522 2587
Elihue Usher	Chaleanor Hotel/ Owner	666 5549
Harry Arzu	Bed & Breakfast/ Manager	605 7035
Ricardo Sjogreen	Blue Marlin/ Manager	610 5871
Martha Rodriguez	Drum Maker/Manager	602 8593
Ilana Smith	Bonefish Hotel/ Manager	522 2243
Mariel Zabaneh	Ocean View facility/ Owner	oceanviewrestaurantbelize@gmail.com /615 1934
Nolan Jackson	Fyah Fishin in Belize/ Owner	njffishing3@gmail.com /671 3009
Andy Aspinall	Belize Adventure Group/ General Manager	676 7676
Jamall Swazo	NGC/ Member	jswaso@gmail.com /602 1884
Adrian Martinez	Ecumenical Junior College/ Educator	doctadiya@gmail.com /601 9444

Tyrone Nunez	Griga Tour & Rental	600 7940
Crystal Lopez	Crystal Creations/ Owner	crystaljasperlopez509@gmail.com / 650 2122
Elizabeth Zelaya	Crystal Creations/ Asistant	625 3053
Carlene Sanchez	BTIA Dangriga/Secretary	btiadangriga@gmail.com

Appendix 5 – Map of Southeast Coast Destination



Appendix 6 – Quarterly Status Report Form

TDDP QUARTERLY STATUS REPORT PERIOD/YEAR

DESTINATION INFORMATION			
Tourism Destination			
TDDP Period	Month Year	End Date	Month Year
Monitoring Group			
Chairperson			
Contact email			
Reporting Period	From DATE/MONTH/YEAR to DATE/MONTH/YEAR		

1. REPORTING SUMMARY

Overall Status:

	Green (Controlled)	Yellow (Caution)	Red (Critical)	Reason for Deviation
Budget	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Schedule	<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/>	<input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Scope	<input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>	

Green (Controlled) – Destination Plan is on schedule.

Yellow (Caution) – Destination Plan has deviated slightly from the plan.

Red (Critical) – Destination Plan has fallen significantly behind schedule

Comments:

2. KEY MILESTONES

	Milestone	Plan Completion Date	Status ³¹	Actual Completion Date
1.				
2.				
3.				
4.				
5.				

³¹ 1) Not Yet Started 2) Delayed 3) On-going 4) Completed

3. ACTIVITIES AND PROGRESS

Planned Activities	Progress Made During Period
Strategic Objective 1.1: <i>(State the Strategic Objective)</i>	
Strategic Activity 1 (State the strategic Activity)	<ul style="list-style-type: none"> Describe in bullet points key actions accomplished within the period related to the strategic activity.
Strategic Activity 2 (Expand as needed)	<ul style="list-style-type: none">
Strategic Objective 2.1: <i>(State the Strategic Objective)</i>	
Strategic Activity 1	<ul style="list-style-type: none">
Strategic Activity 2	

4. LESSONS LEARNED

Lessons from executing the TDDP

Destination Plan Areas	What happened while you were working on this phase?	Why did it happen that way?	What would you have done differently? The same?	Therefore... what has been learned (lesson learned)
Strategic Thrust 1	•	•	•	•
Strategic Thrust 2	•	•	•	•
Strategic Thrust 3	•	•	•	•

5. RISKS, ISSUES, AND CHALLENGES

Risk type	Risk Description	P ³² : 1 – 5 (1=low 5=high)	S ³³ : 1 – 5 (1=low 5=high)	Risk Score (P+S)	Detail of action to be taken (mitigation / reduction / transfer / acceptance)
Political	•	•	•	•	•
Economic	•	•	•	•	•
Social	•	•	•	•	•
Technological	•	•	•	•	•
Environmental	•	•	•	•	•
Legal	•	•	•	•	•

³² Likelihood Of Risk Occurring

³³ Severity of Risk

6. NEXT STEPS

(List the key actions planned for the next reporting period)

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