



# National Sustainable Tourism Master plan for Belize 2030

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# *Belize Tourism Industry Today*



## Belize as a tourism destination is characterized by having excellent natural resources

Excellent  
natural  
resources

Tourist Overnight  
Arrivals: 245,000

Cruise Tourist  
Arrivals: 705,000

Tourist Overnight  
approx 2,000

Tourist ALOS  
days

Tourist average  
expenditure

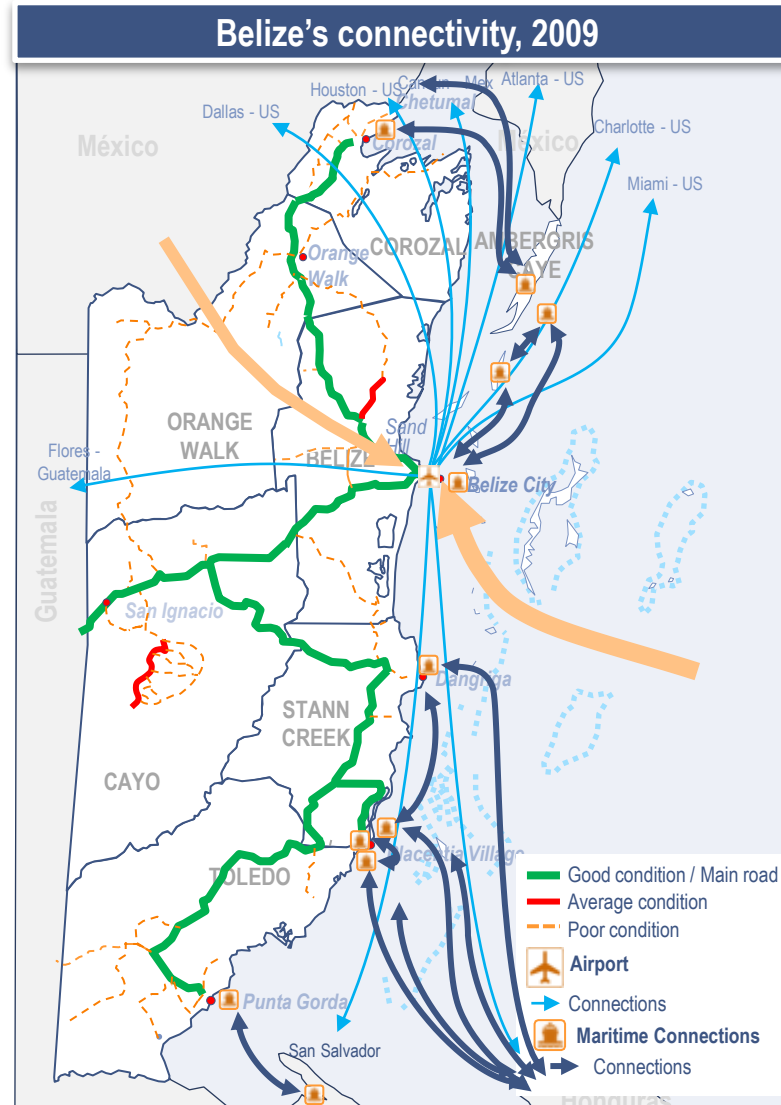
Tourist Expenditure  
US\$: 248 millions



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

- Belize has one international airport in Belize City operating mainly flights to/from the USA and neighboring countries
- A second international airport in Placencia is under construction

Various sea routes are offered by ferries and water taxis to domestic and regional destinations



National roads and highways are one line roads with low standard conditions

Many secondary roads to tourism attractions are in unfavorable conditions

# *Belize 2030 Tourism Goals*

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



Arrivals

245,026



ALOS

8.36



Average  
Expenditure  
per day (USD)

133



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



**Generated  
overnights**

2,047,327



**Total overnight  
expenditure  
(USD)**

247,720.00





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



Arrivals

597,3



Average  
Expenditure  
per visit (USD)

57



Total cruise  
Expenditure  
(USD)

33.780



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

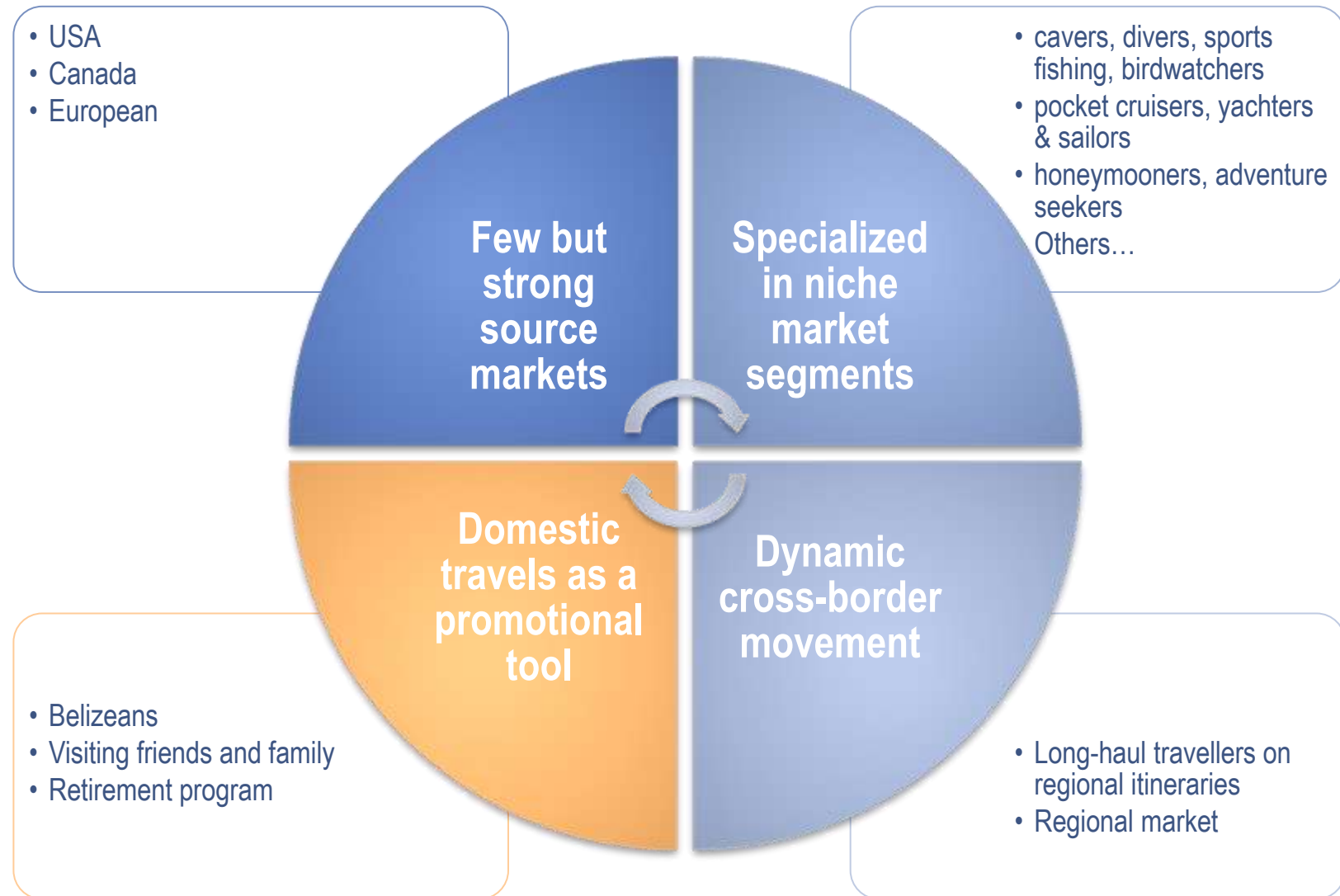


**Total  
Tourism  
expenditure  
(USD)**



# *Belize Tourism In Markets 2030*

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



# *Belize Tourism Product Development*



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

### Product Development Approach:

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

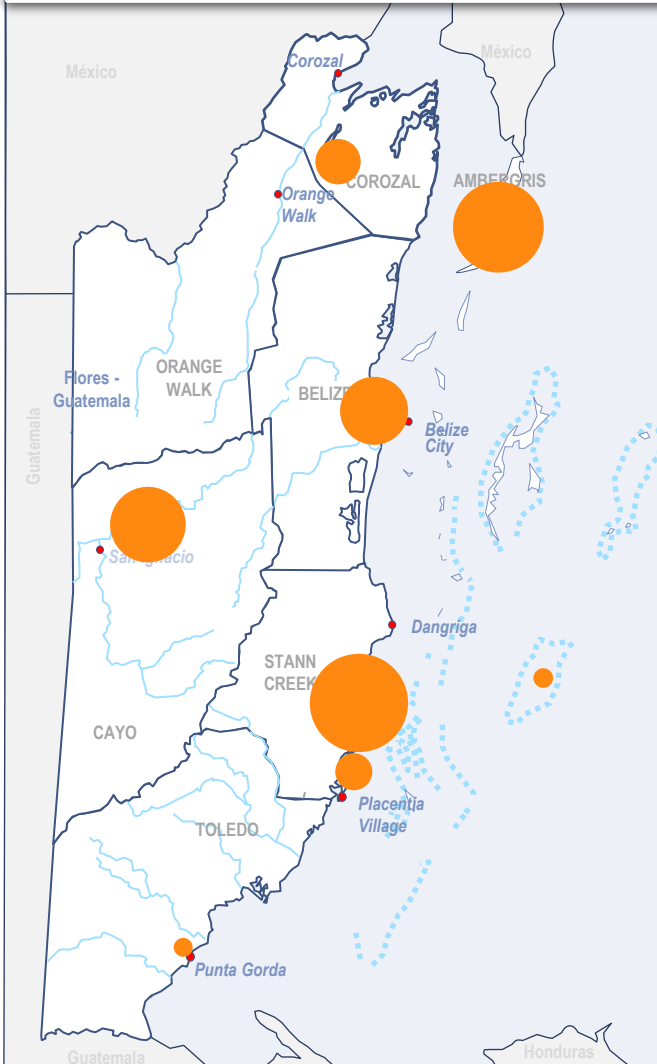
### Tourism Product Conceptualization



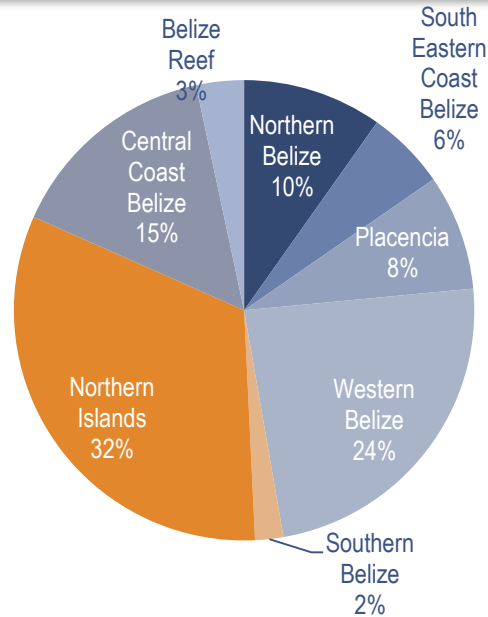
# *Belize Tourism Destination Development*

# Tourism will be distributed into other destinations, mobilizing development to emerging destinations by 2030

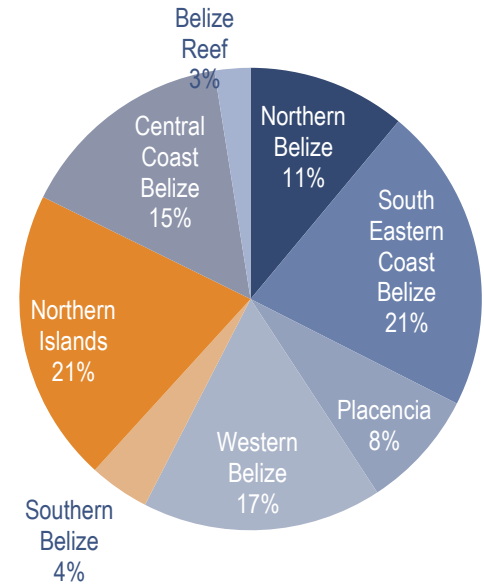
**Belize Tourism Destination, 2030**



**Belize Tourism Distribution, 2008**



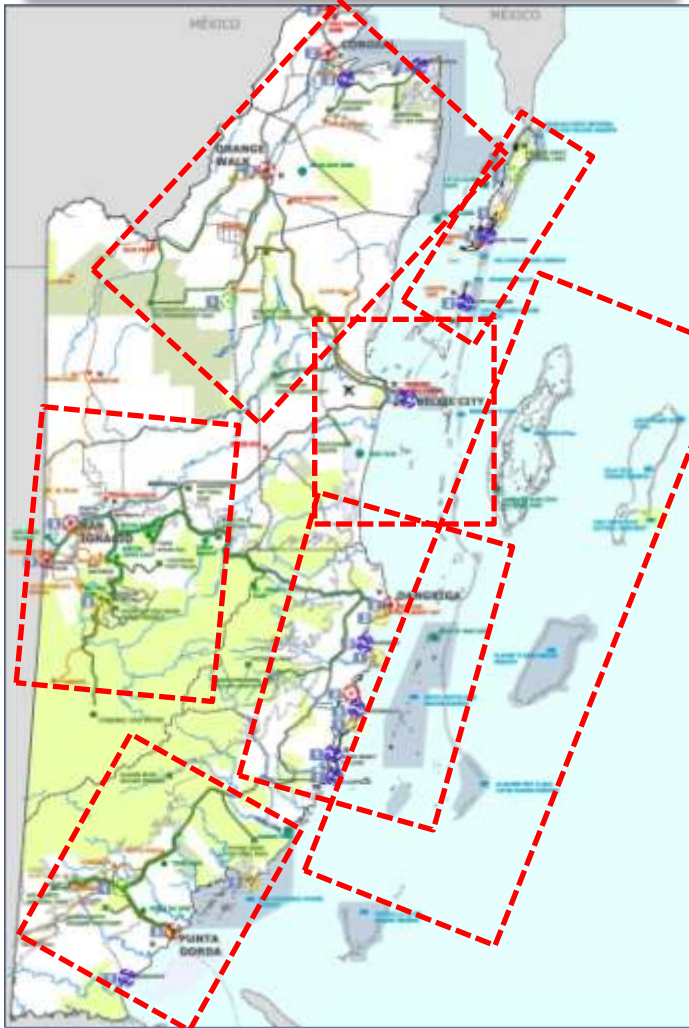
**Belize Tourism Distribution, 2030**



**By 2030 new destinations will profit from the benefits of increased tourism economic activity**

**Belize will have seven unique tourism destination that all together converge in a cohesive offering that make Belize a distinctive and highly competitive destination**

### Belize Tourism Destinations



**Central Coast  
Belize**

► Urban renovation

**Northern Islands**

► Constrain development and consolidate

**Northern Belize**

► Promote tourism growth

**South Eastern  
Coast Belize**

► Constrain development and consolidate  
► New development

**Western Belize**

► Promote tourism growth

**Southern Belize**

► Promote tourism growth

**Belize Reef**

► Constraint development and consolidate

# Tourism development model summary at a national level for Belize

## Tourism development model for Belize- National level (2030)

Development

High value –  
low impact

Density

1 – 2 – 3

Overnights (2030)

5,895,376

Overnight growth  
(2010 – 2030)

2.88 Multiplier

Hotel rooms (2030)

13,754

New hotel rooms  
(2010 – 2030)

6,869





The level of density refers to the accommodation units that are built per land unit and therefore shape the landscape and the scenery

0

Untouched nature



1

Very low density  
Approx. 2 – 10 units/hectare



2

Low density  
Approx. 30 -50 units/hectare



3

Medium density  
Approx. 75 – 100  
units/hectare



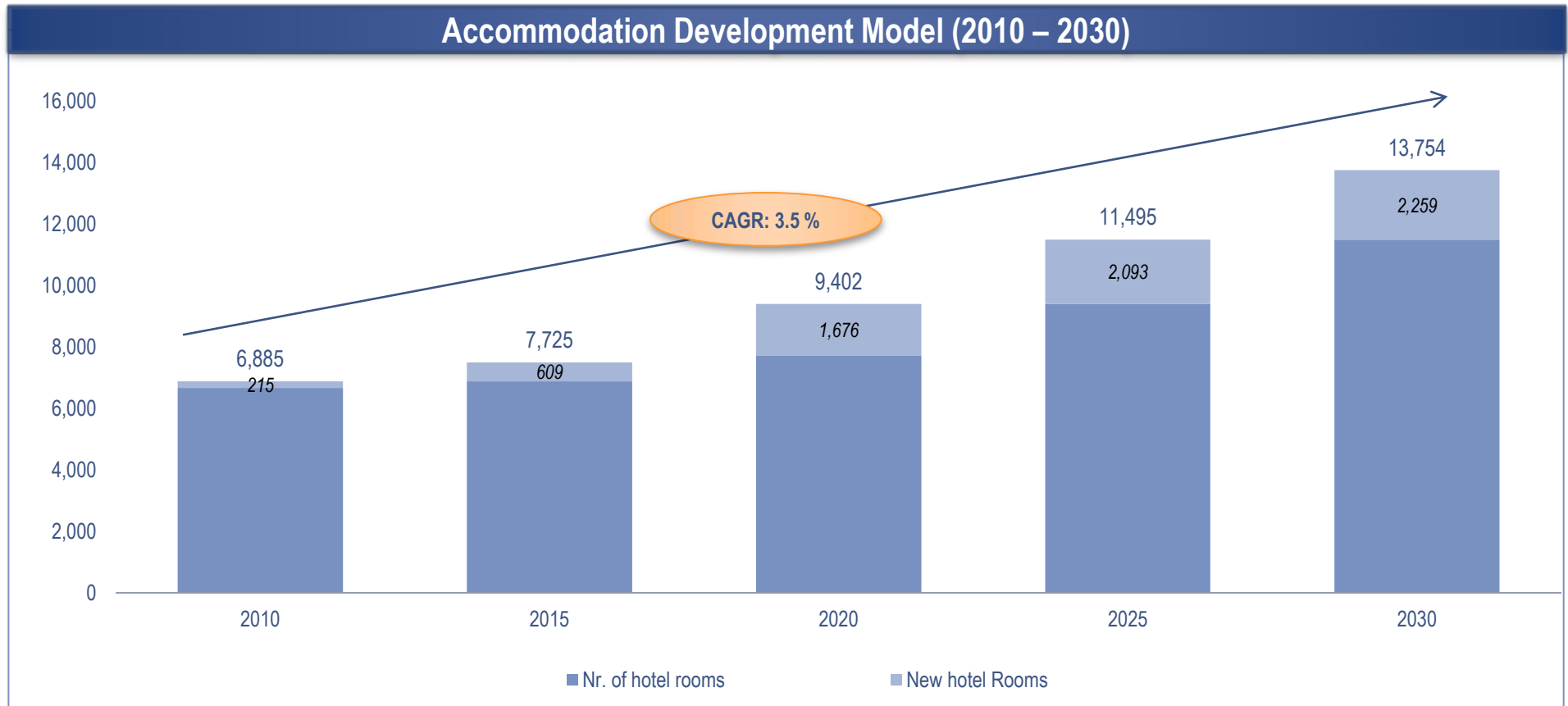
4

High density  
More than 150  
units/hectare



\* Units can be apartments or rooms  
\* 1 hectare are 2.47 acres

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



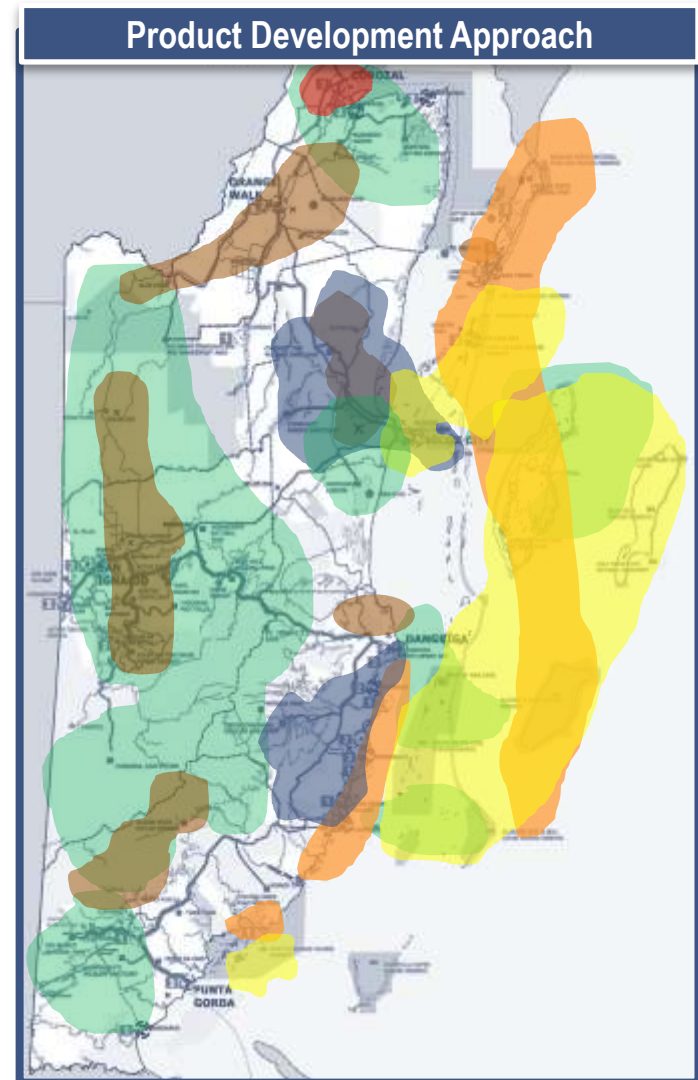
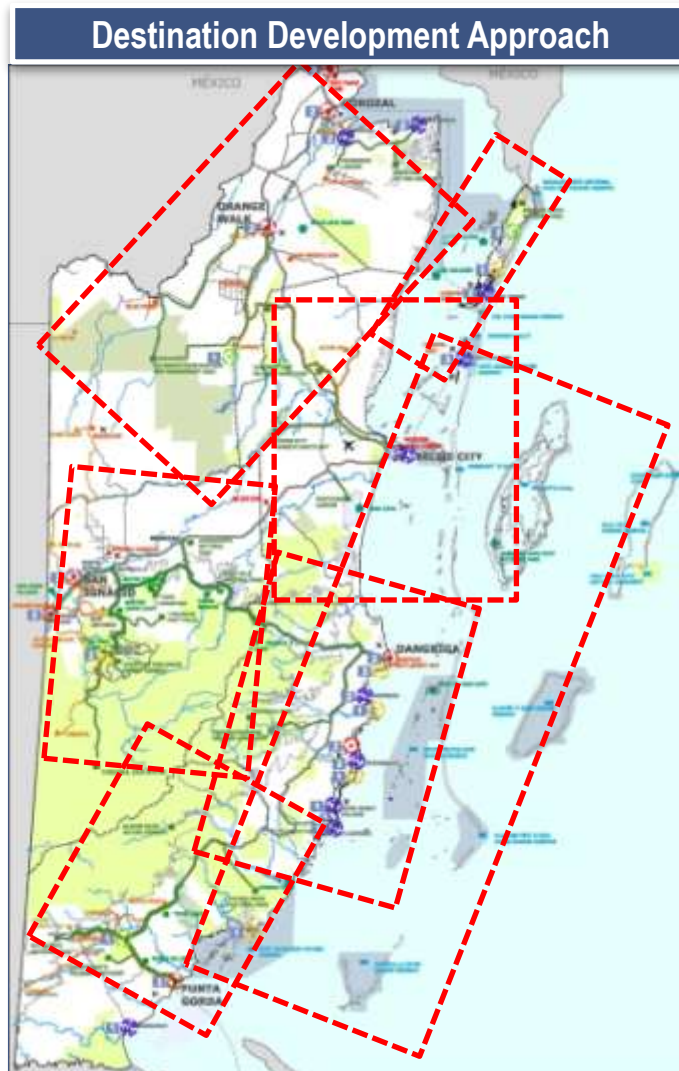
**6869 New Hotel rooms by 2030**

**Building phase I (2012-2020): 37% ; Building phase II (2020-2030): 63%**

# *Belize 2030 Master plan Approaches*

Approach 1:  
*Product development*  
*GOAL: Optimization*

The first approach is to structure the tourism offering into a diversified product portfolio that maximizes tourism asset potential that meets the international tourism market demands





Approach 2:

*Integrated site development*

*GOAL: Competitiveness and  
Sustainability*

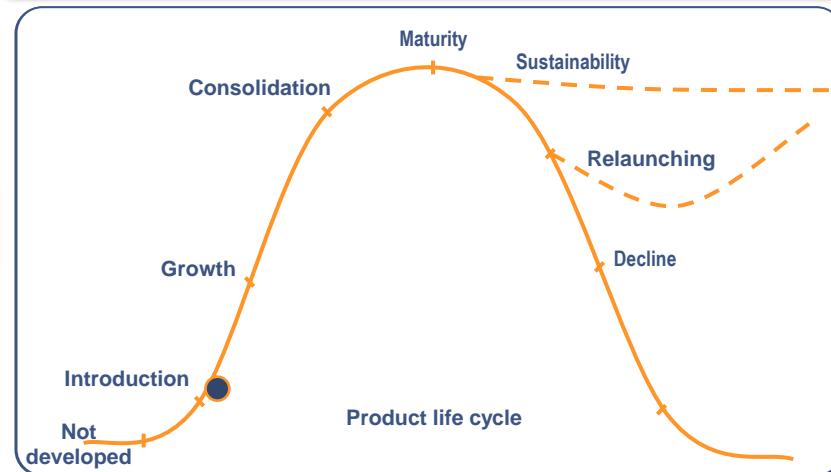
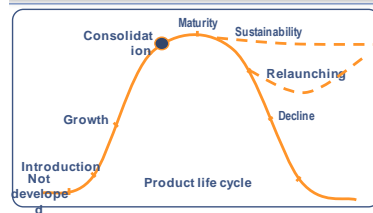
## The integral development of tourism sites focuses on completing the entire value chain of experiences of one site before moving to another site

### Nautical Tourism Value Chain Development Site 1

### Nautical Tourism Value Chain Development Site 2

### Nautical tourism site 2: Consolidation

#### Nautical Tourism Site 1: Consolidation



Approach 3:

*Experiential quality  
enhancement*

*GOAL: Competitiveness*

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

### *Professional and friendly human resources*



### *Enhanced visual context*



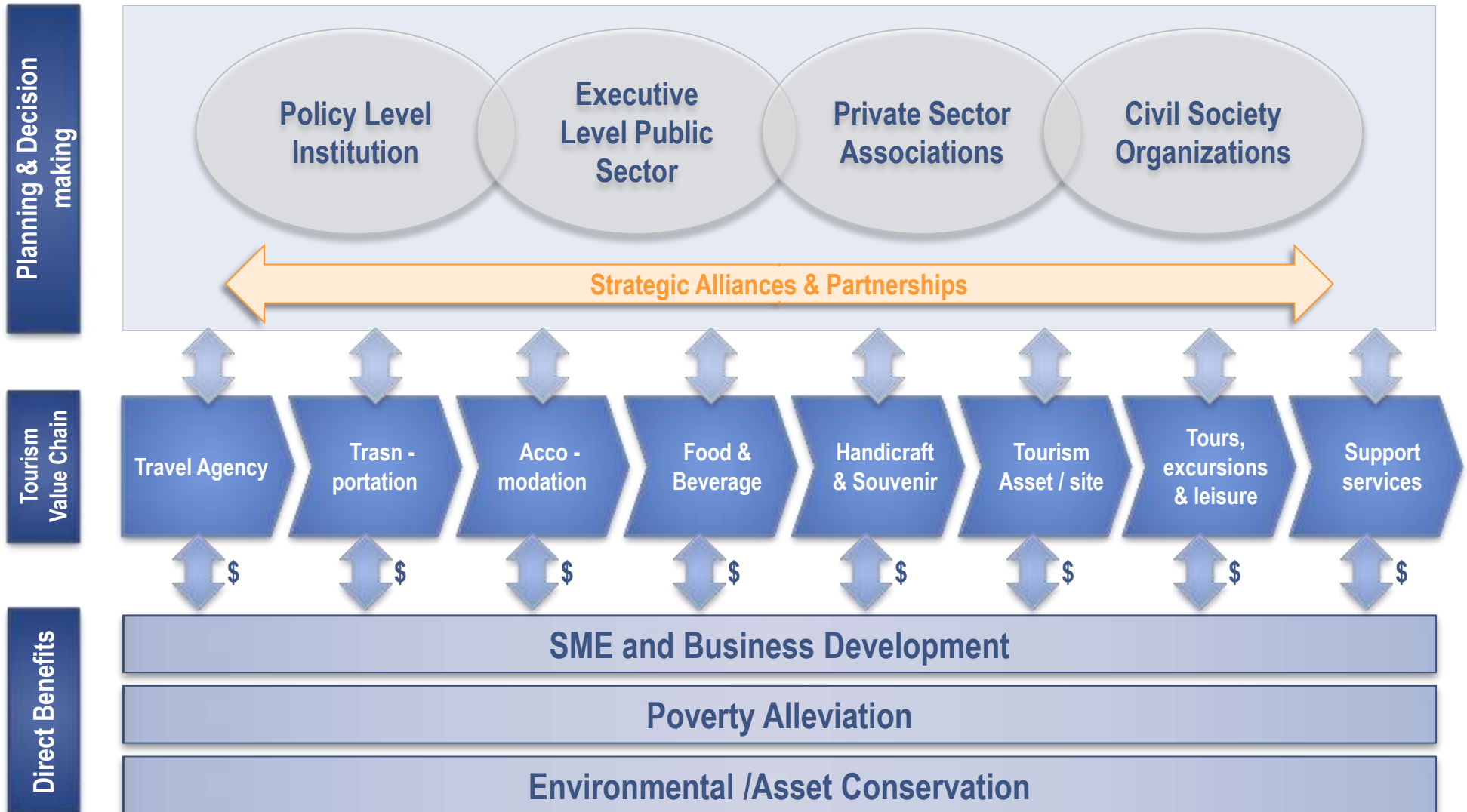
### *Comfort of feeling safe*



Approach 4:

*Empowerment of stakeholders*  
*Goal: Leadership & Optimization*

# Stakeholder participation and channelling of benefits is key in order to reach long term sustainability and maximum profitability of Belize's tourism sector



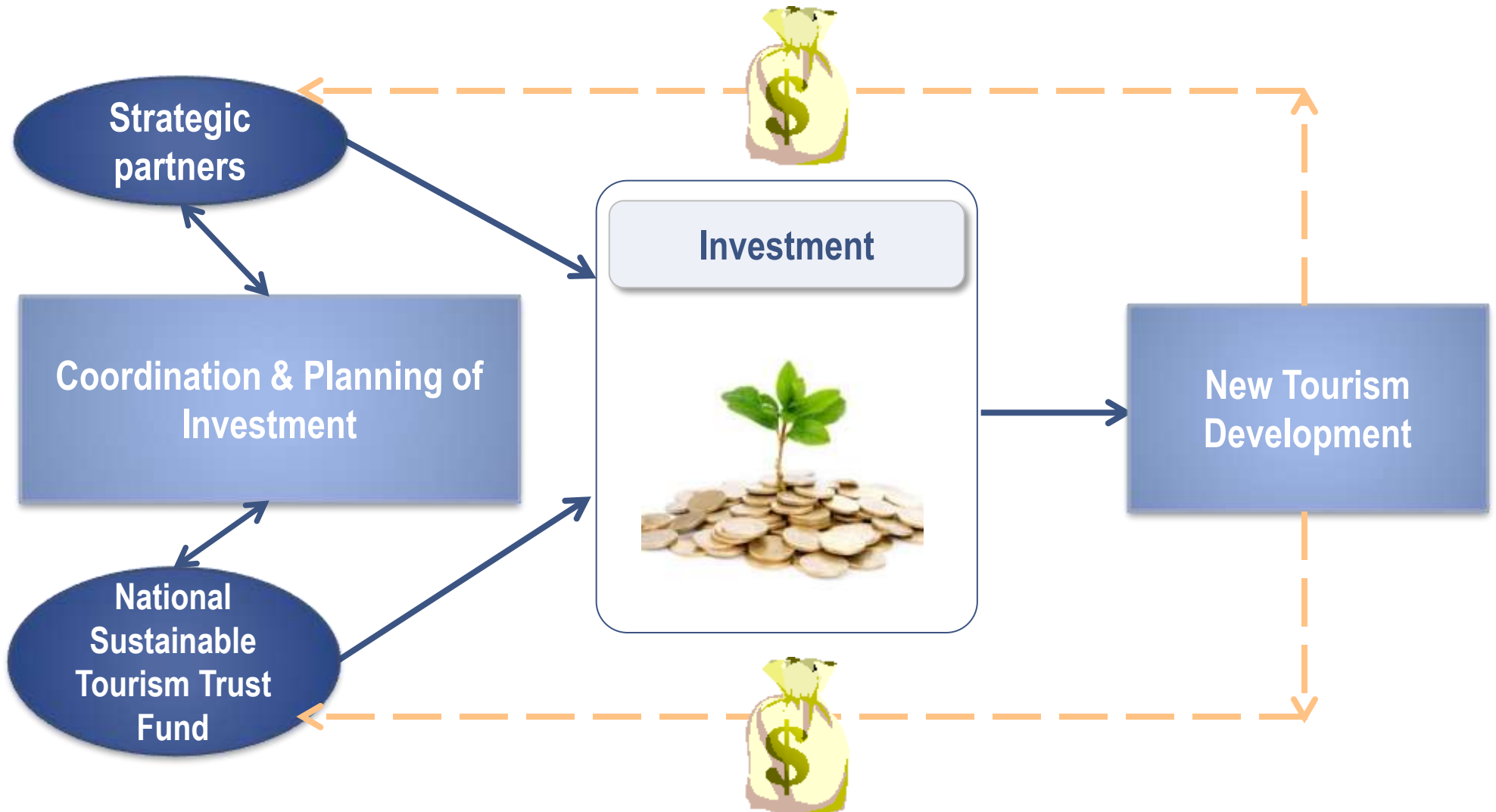


Approach 5:

*Proactive solution to funding  
sources*

*Goal: Leadership & Sustainability*

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



# *NSTMP - Tourism Development Macro Programs*

## Belize's National Sustainable Tourism Master Plan 2030 is structured into five macro programs according to the subject focused upon



Source: T&L, 2011

*Marketing Macro Program*

*Sustainability & Quality Macro Program*

*Infrastructures Macro Program*

*Governance Macro Program*

*Product Development Macro Program*

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

## Business & Product Development

- ▶ Specific interventions and investments to support product

## Infrastructure and Accessibility

- ▶ Accessibility
- ▶ Support services consolidation

## Capacity Building

- ▶ Continuous training

## Governance

- ▶ Regulations, norms and law

## Safety and Security Assurance

- ▶ Operational guidelines
- ▶ Safety & Security
- ▶ Integrated Quality Management system

## Sustainability

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

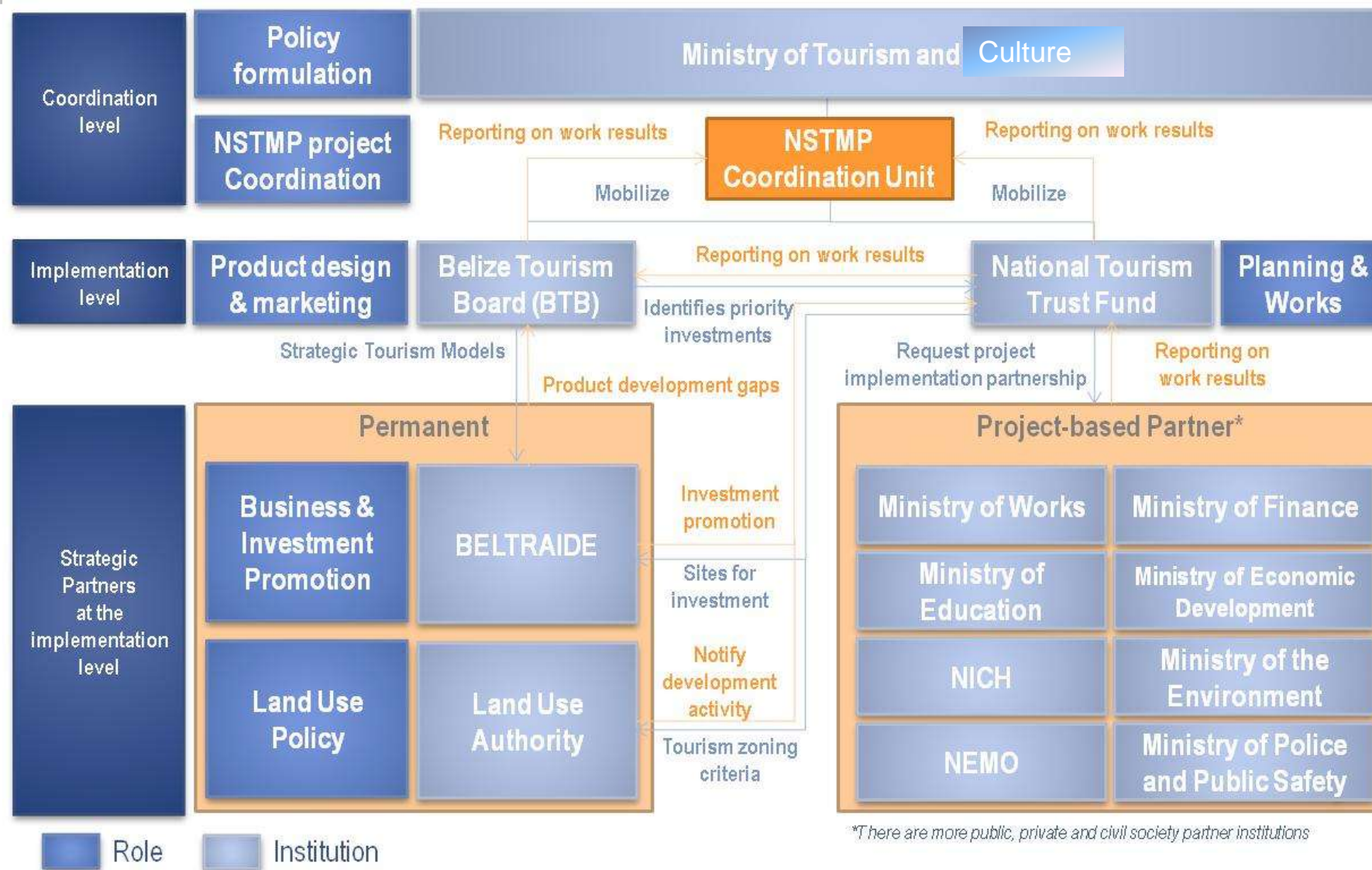
## Marketing and Awareness

- ▶ Product Tourism Brands
- ▶ Tourism product club
- ▶ Promotion, communication & PR
- ▶ Product specific awareness development



# *Master Plan Project Implementation Manual (PIM)*

The NSTMP implementation will be guided by a Coordination Office intended to be a technical team within the Ministry of Tourism and responsible for leading implementers and consultants



\*There are more public, private and civil society partner institutions

**The PIM intends to aid the Coordination Office in the initial phases of the NSTMP implementation in organizing stakeholders, prioritization, budget allocation, risk management and M&E**

## Components of the Project Implementation Manual

### Roles and Responsibilities

- Coordination Office
- Implementation institutions
- Strategic Partnerships

### Program Implementation key stakeholders

- Policy Level Leadership
- Executive level leadership
- Strategic Partnerships

### Budget Considerations

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

### Priority Investment Projects

- Key public investment projects
- Key Private sector investment concepts

### Results Framework

- Strategic indicators
- Macro-programs indicators

### Risk Analysis

- Identification of risk level
- Mitigation measures

## Private Sector Priority Projects Concepts I

1



### Inland Ec lodge

- Adventure: Adventure Ec lodge: High-end and low-density accommodation facilities accessible to inland adventure travelers with amenities, equipment and services catering to the needs of adventure activities.
- Relaxing Ec lodge: High-end and low-density accommodation facilities appealing for travellers seeking to enjoy pristine nature and closeness to archaeological sites.

2



### Diving Lodge

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

3



### Fishing Lodge

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

4



### Beach Boutique Hotel

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

5



### Beach Resort

- Mid to High end mid-density coastal accommodation facility with beach access and catering to the needs of sun and beach holidays and complementary activities.

## Private Sector Priority Projects Concepts II

6



### Cruise Terminal

- Development of secondary cruise port and complementary services in Belize City for conventional cruise market
- Development of a pocket cruise port and complementary services in south eastern coast Belize.

7



### Marina Mix Development

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

8



### Flagship Urban Hotel

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

9



### Shopping and Entertainment zone

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

10



### Private Island Development

- Luxury and very-low to low density mix development use business models for private islands that cater to very exclusive clientele.





# National Sustainable Tourism Master plan for Belize 2030

*SNACK BREAK*

July, 2011