



Hopkins Tourism Destination Development Plan

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## Acronyms

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ARR	Average Room Rates
ATM	Automated Teller Machine
BAA	Belize Airport Authority
BBRS	Barrier Reef System
BMA	Belize Management Agency
BTB	Belize Tourism Board
BTIA	Belize Tourism Industry Association
CPM	Competitive Profile Matrix
CTO	Caribbean Tourism Organization
DAVCO	District Association of Village Councils
DCA	Department of Civil Aviation
EIA	Environmental Impact Assessment
FSTV	Fort Point Tourism Village
FGD	Focus Group Division
GDP	Gross Domestic Product
GOB	Government of Belize
GSTC	Global Sustainable Tourism Council
ITVET	Institute Technical and Vocational Education Training
LOS	Length of Stay
LTC	Local Tourism Council
MCC	Monitoring and Coordination Committee
MTCA	Ministry of Tourism and Civil Aviation
NAVCO	National Association of Village Councils
NGO	Non-Government Organization
NICH	National Institute of Culture and Heritage
NSTMP	National Sustainable Tourism Master

ORT	Objectives, Responsibilities and Targets
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
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
VCT	Voluntary and Counselling Testing Center
VRBO	Vacation Rentals by Owners
WTTC	World Travel & Tourism Council

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## Foreword

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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



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## Executive Summary

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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 Hopkins as a tourism destination.

***A thriving sandy beach community with diverse, world-class marine and jungle eco-tourism attractions providing visitors with authentic and vibrant Garifuna and other cultural experiences in a united, family-friendly, and safe environment.***

To realize this destination vision, the Hopkins Destination must invest heavily in creating and delivering new iconic experiences that embrace its local distinctiveness, developing and implementing a branding and marketing strategy, and enhancing the visitor journey through improved quality assurance and security. This will be done by focusing on four strategic thrusts/goals, which are:

### **Thrust 1: Enhancing Meaningful Local Participation**

Developing a sustainable tourism industry requires the inclusion and participation of the local community both to avoid a negative effect on the local culture and ensure that community members benefit directly from the growth of the tourism industry — meaningful inclusion and participation range from ownership of tourism businesses to gainful employment. There is a growing sentiment among residents of Hopkins, that native Belizeans are only benefitting marginally from tourism growth. Hopkins will, therefore, support local entrepreneurship and ensure that the tourism workforce is prepared to compete for higher-level jobs in tourism. This effort emphasizes the need to

ensure that local operators and investors (alongside their foreign counterparts) are able to become direct actors and beneficiaries throughout the tourism value chain.

### **Thrust 2: Improving Safety, Security, and Enforcement of Regulations**

Guaranteeing a safe experience to visitors is important to local tourism stakeholders and critical for the sustainability of the sector. The destination will focus on improving all elements of safety and security both for the visitor and community members. Much of this will be realized through the proper enforcement of current regulations that are relevant to the tourism industry.

### **Thrust 3: Developing Branding and Marketing Strategy**

As a rapidly growing destination, Hopkins now needs to ensure that it develops a clear brand identity that resonates with current and emerging market segments. The destination brand is an essential element of differentiating and positioning Hopkins as part of the Belize product. Having a clearly defined brand can help set Hopkins apart from other destinations in the Southeast Coast and the country. The brand also represents the destination's promise to visitors. Development of the brand strategy, therefore, provide stakeholders with an opportunity to refine further their plan on how to enhance the visitor experience. As a growing destination, Hopkins needs to differentiate its product in order to capture greater market share.

While the branding strategy will help capture what is most iconic about Hopkins, the marketing strategy will help stakeholders to define their priority markets and establish a collective plan for attracting visitors from priority markets. The marketing plan helps tourism stakeholders to think through and agree to specific actions that they can take to more effectively position and promote Hopkins and its iconic experiences. Most importantly, the plan helps stakeholders to define how best to promote the destination in a cohesive and coordinated manner.

### **Thrust 4: Diversifying Tourism Product Offerings**

There is a limited variety of experiences (tours) being offered in Hopkins. Currently, most tours on offer are marine focused. These include mostly short day-trips to nearby islands including the South Water Caye Marine Reserve where visitors can fish, swim or snorkel. Tourism stakeholders realize that there are many other tourism assets that they are not yet tapping. For instance, there are many adventure and nature experiences that can be offered in the many terrestrial and natural attractions such as the bioluminescence lagoon, and new cultural experiences that can be offered around key events such as the

International Paranda Music Festival. Hopkins will, therefore, explore and develop new excursions and services in order to diversify its product offerings as part of its development.

The strategic objectives for the destination are listed below.

Develop and strengthen local business enterprises

- Strengthen law enforcement
- Develop a destination branding and marketing strategy
- Improve Hopkin's Community Infrastructure
- Enhance portfolio of destination product offerings
- Strengthen human resource capacity in tourism services

The Hopkins 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 the Southeast Coast.

Three significant aspects describing tourism in Belize include:

- The Belize tourism product;
- A macro-environmental profile of tourism in Belize; and
- The institutional and regulatory framework of the national tourism sector.

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

- The Hopkins tourism product;
- The tourism assets of the destination;
- Tourism trends of Hopkins;
- Tour operators and guides of the area; and
- 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 Hopkins 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 Hopkins.

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) Hopkins Tourism Assets, 2) Asset Readiness Rating Criteria, 3) Meeting Participants, 4) Map of Hopkins, 5) Quarterly Status Report, and 6) Selected References/Bibliography.



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## SECTION 1: BACKGROUND

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## 1 Tourism in Belize

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### 1.1 The Belize Tourism Product

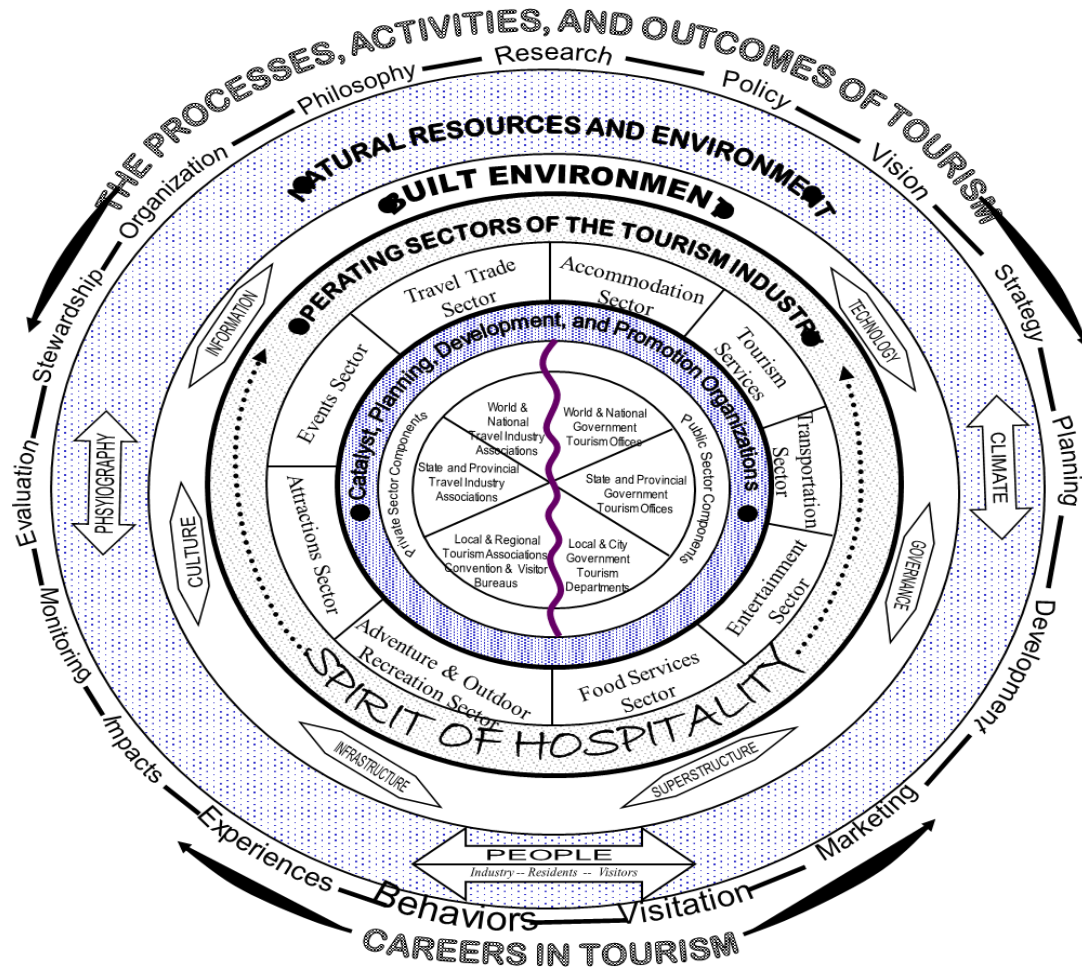
Belize's current macroeconomic activity is driven primarily by traditional exports such as sugar, bananas, and citrus. Most recently, Belize had some success exporting petroleum (a non-renewable resource), however, is a non-renewable resource, the supply is now dwindling. A thriving sector of the economy 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         | 7. Attractions Sector                      |
| 3. Transportation Sector    | 8. Events Sector                           |
| 4. Entertainment Sector     | 9. Travel Trade Sector                     |
| 5. Food Services 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 TOURISM<sup>1</sup>



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 can be highlighted with the following major assets in mind:

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

<sup>1</sup> 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, a central component of Belize's tourism product is in 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 were "diving". Other activities that most reported engaging in were fishing, kayaking, and sailing. The survey reported that 27% participated in "jungle and rainforest expeditions". Said 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 Parks (Source: Travel and Tourism Digest 2016, BTB). 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. Further, a visitor can engage in both marine and land activities in the span of a day; another competitive advantage.

### **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 a few agricultural exports and some light manufacturing. Additionally, there is active economic activity from the public and retail sectors. Belize has a small economy as reflected in Table 1 which highlights Gross Domestic Product (GDP) growth over the last five years. The economy has a minimal GDP growth rate that averages between 2 and 3% which is 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. Governments have always seen tourism as one of these drivers.



**TABLE 1: BELIZE GDP GROWTH (IN MILLIONS OF DOLLARS)<sup>2</sup>**

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

In Belize, tourism is the 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 was 15% (BZ\$555m) with a broader contribution of 41.3% (BZ\$1.5b) Figure 2. 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 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 greater 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 broader contribution of tourism to an economy (Figure 3) (2018 Belize Economic Impact Report, WTTC)<sup>3</sup> and it is for this reason that tourism is seen as a driving force to assist Belize in its economic development; the concept of the “multiplier effect”<sup>4</sup>. It is evident from Figure 4 that travel and tourism has a significant correlation with other economic activities.

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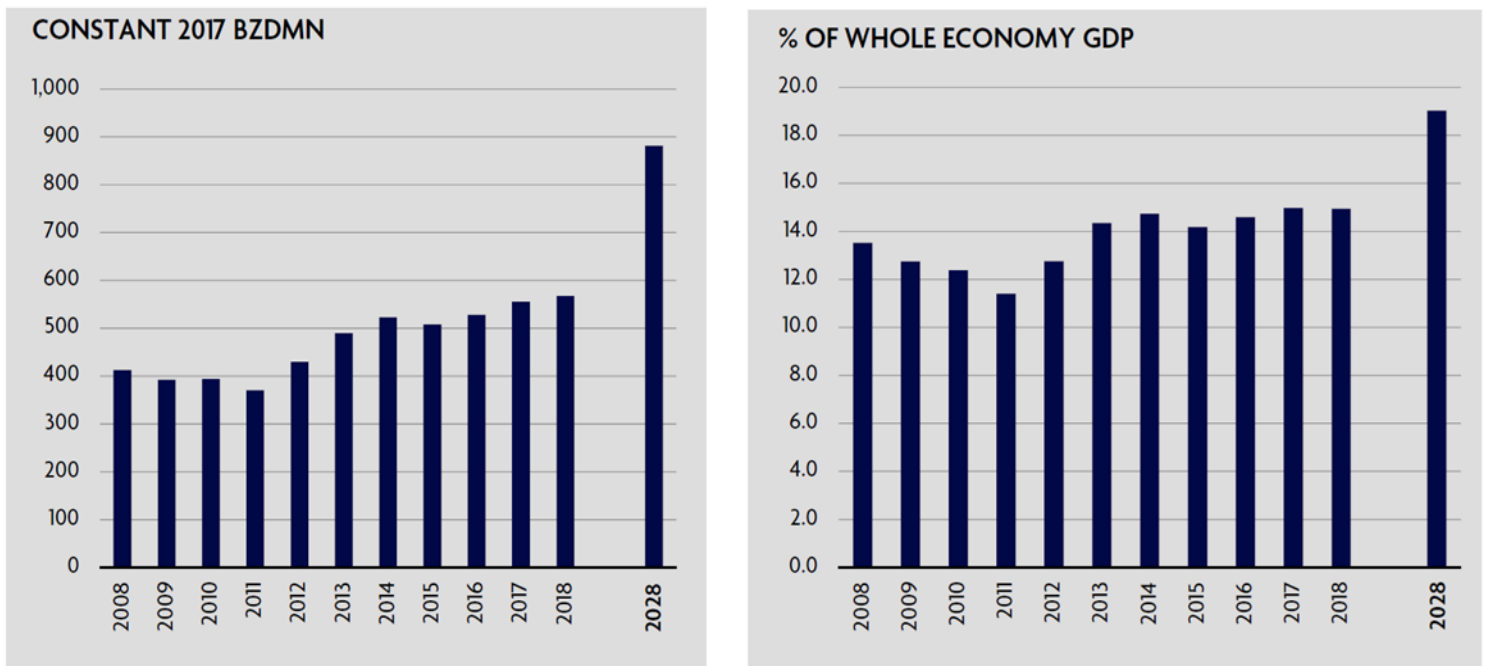
<sup>2</sup> Source: Statistical Institute of Belize, March 2018.

<sup>3</sup> 2018 Belize Economic Impact Report, World Travel and Tourism Council

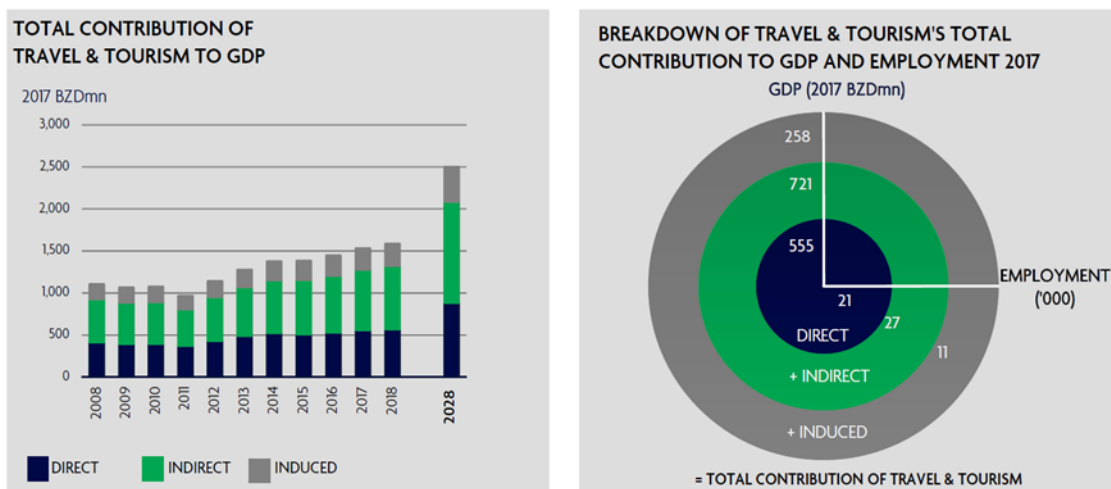
<sup>4</sup> 2018 Belize Economic Impact Report, World Travel and Tourism Council

**FIGURE 2: DIRECT CONTRIBUTION OF TRAVEL AND TOURISM**

**BELIZE: DIRECT CONTRIBUTION OF TRAVEL & TOURISM TO GDP**

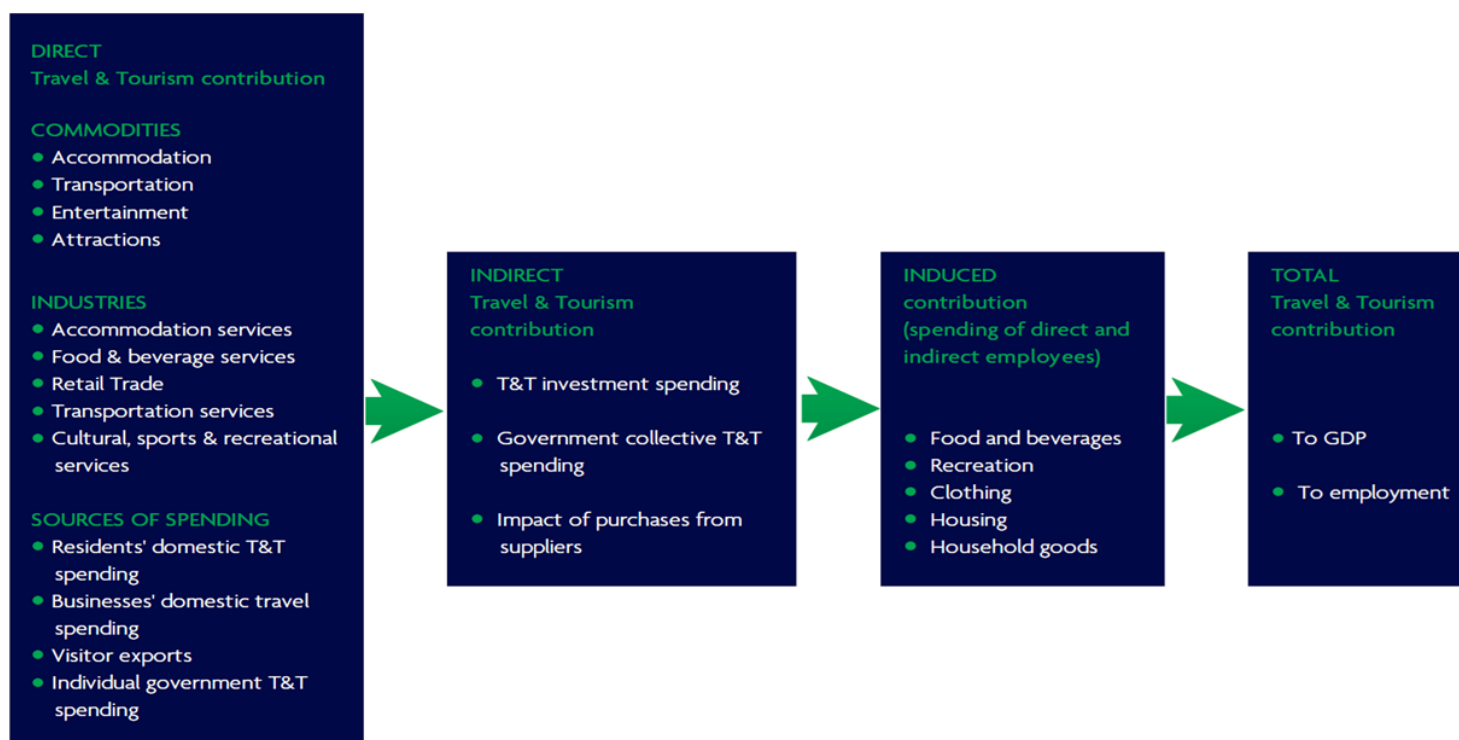


**FIGURE 3: TOURISM CONTRIBUTION TO BELIZE'S GDP <sup>5</sup>**



<sup>5</sup> Source: WTTC Economic Impact Report, 2018

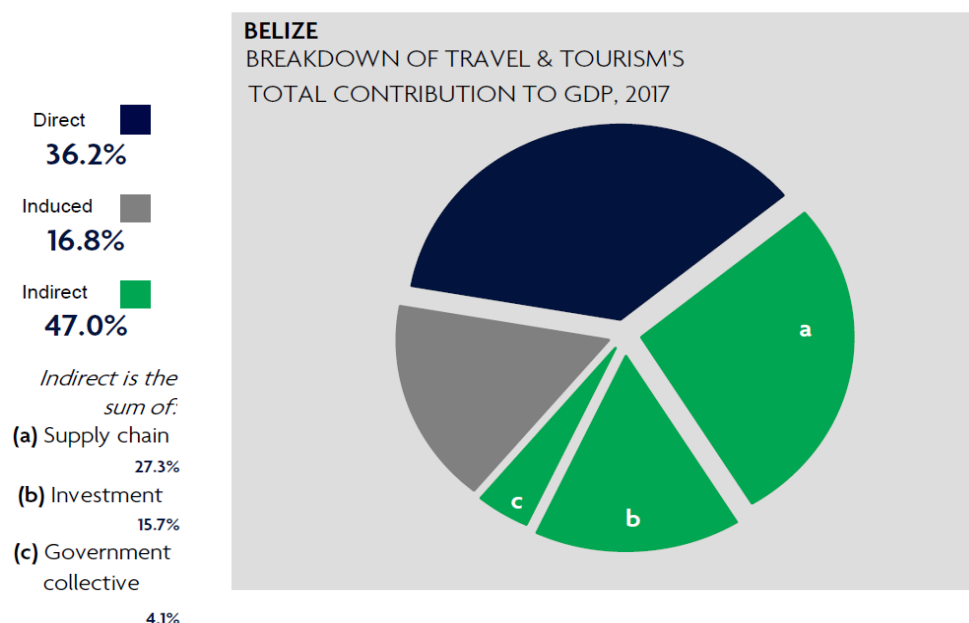
**FIGURE 4: THE CONTRIBUTION OF TOURISM TO AN ECONOMY<sup>6</sup>**



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.

<sup>6</sup> Source: WTC Report

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



<sup>1</sup> 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.*”<sup>7</sup> 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

<sup>7</sup> 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 3). 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

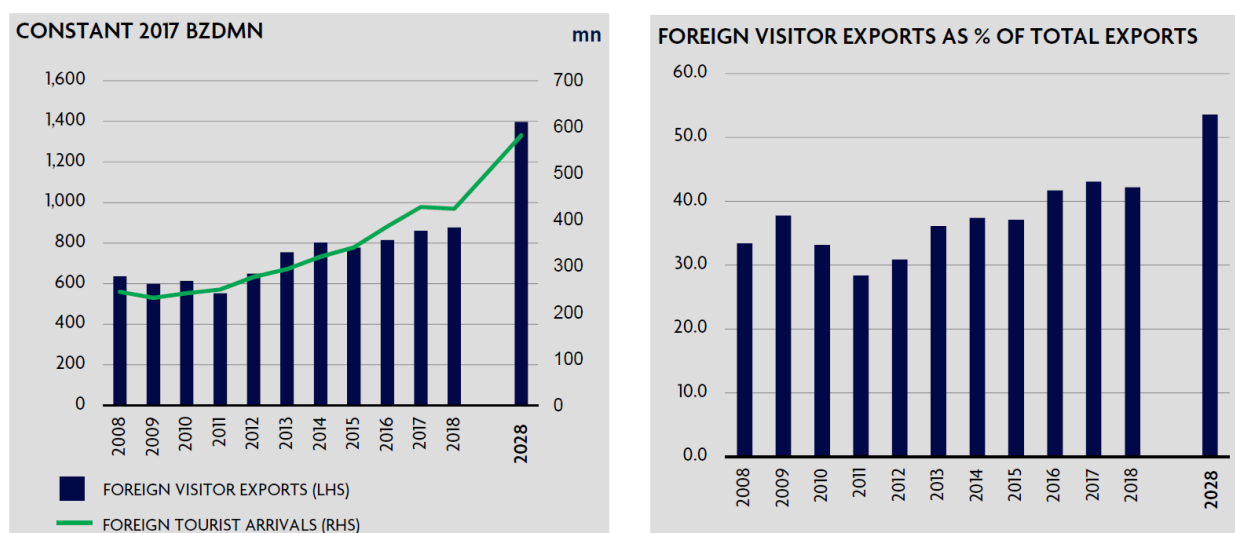
total exports in 2028 (Figure 6). The data consistently shows that overnight visitors account for approximately 85% of this expenditure and 15% allocated to cruise passengers.

**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**



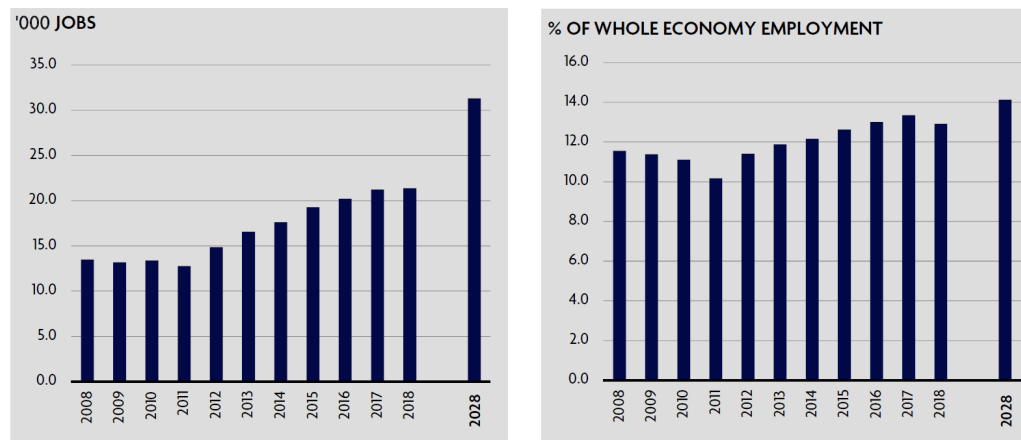
**Source: WTTC World Economic Outlook, 2018**

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 major 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 important 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 a substantive ministry within the Government of Belize including the ministry headquarters, one government department (Department of Civil Aviation-DCA) and three statutory agencies (the Belize Tourism Board-BTB, the Border Management Agency-BMA and the Belize Airports Authority-BAA). Unlike other substantive 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 (DCA, BTB, BAA and BMA).

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

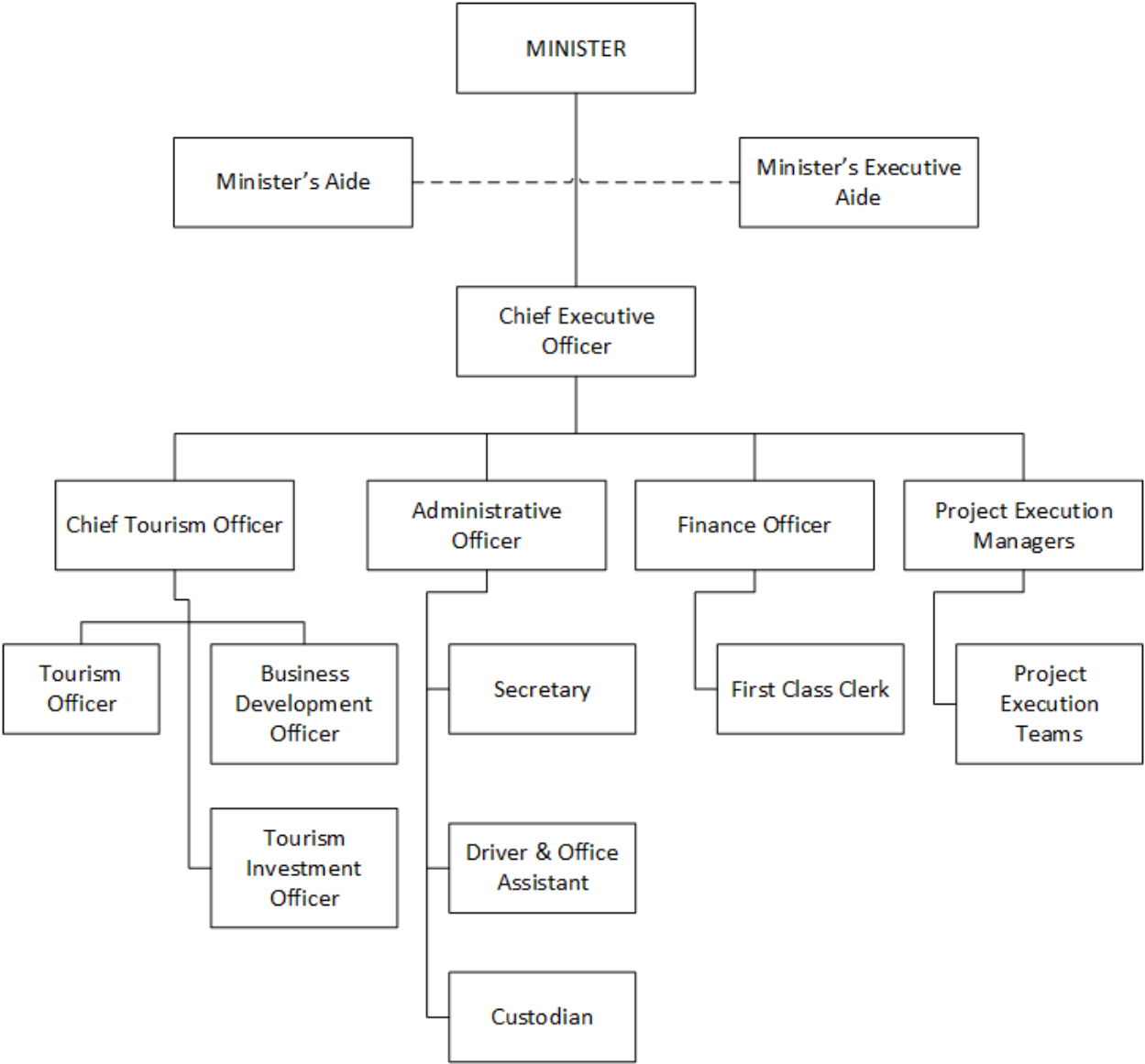
The BAA is responsible for the management, maintenance and administration of certified and prescribed airport facilities and aerodromes in the country.

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 Hopkins**

Management and governance of tourism in Belize occur primarily at the macro level through the MTCA and BTB. At the local level, there is no entity directly responsible for tourism management and governance. 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.

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 village<sup>8</sup>.

The Hopkins destination has a village council comprised of seven persons with an executive including a Chairperson, Vice Chairperson, Secretary, and Treasurer. Other members are councillors. The village council is a volunteer group and only acts as a lobbying body to the MTC and BTB on behalf of community residents.

In addition to the village council, there is a local chapter of the of the BTIA. Many tourism projects and activities are implemented or supported by the BTIA. The BTIA also acts as a lobbying body, however on behalf of its private sector members.

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<sup>8</sup> Country Profile 2017–18



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## 2. The Planning Context

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### 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 major 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.

At the local level, Hopkins is governed by a Village Council, which is made up of a Chairman and six councillors who are elected for a period of three years along party lines. Village councils are charged with maintaining good governance and improvement of their village and rely on the central government for subventions, as well as on revenues from liquor licenses and trade licenses. Hopkins also has a Water Board appointed by the Minister of Rural Development that is charged with “operations and maintenance activities necessary for the uninterrupted service of water in respect to the village”. Like all other village councils, the Hopkins Village Council is a member of the District Association of Village Councils (DAVCO) and the National Association of Village Councils (NAVCO). The rationale for establishing these Associations was to strengthen further the voice of the councils and the people they represent. In terms of the local political environment, the local political scene in Hopkins Village is peaceful and stable. There is no evidence to indicate that either national or local politics can significantly change the trajectory of the future direction of the Belize tourism product.

Hopkins (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 South Eastern 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 such as Hopkins 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 main hub for nautical tourism development and the first to attract the pocket cruise market.

Belize has over 140 registered non-governmental organizations (NGOs) which include a strong 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 – can have a major influence as it relates to tourism policies and practices. Another NGO, the Southern Environmental Association, co-manages two marine protected areas off the southeastern coast – the Laughing Bird Caye National Park and the Gladden Spit Silk Cayes 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 for Belizeans travelling to destinations such as Hopkins will be limited. The Stann Creek area (excluding Placencia) has the fourth highest average room rate at US\$274<sup>9</sup>. Only Ambergris Caye, Placencia and “Other Islands” have higher rates at US\$403, US\$355, and US\$295, respectively. The other six major destinations in the country have much lower average room rates, which may be more within the budget of the average Belizean<sup>10</sup>. 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.

Employment opportunities exist in the Hopkins area, but the jobs require highly skilled workers who are in short supply. A local workforce is available, but it consists mostly of low-skilled labourers. In general, low-skilled labourers are confronted with a local labour market that does not have sufficient employment opportunities. Businesses are

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<sup>9</sup> Data specific to Hopkins was not available.

<sup>10</sup> 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.

compelled to bring in skilled workers from outside the village in order to meet their current needs.

## SOCIO-CULTURAL FACTORS

A main socio-cultural factor that has directly affected tourism is the increase in crime in the country. In the Hopkins area, the incidence of crime has been increasing, including theft of property, as well as some recent cases of sexual assaults and murder of expatriates and tourists. This issue needs to be monitored, researched to better understand the root cause, and addressed holistically by the destination. Safety and security issues negatively impact the destination's image. Furthermore, the risk is one of the most influential factors in a tourist's travel decision about where to travel.

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 international visitors will continue to be more than the population on an annual basis.

Changing population is impacting the social fabric of Hopkins. A priority issue flagged by stakeholders is the growing resentment between the local residents and the expatriate community, many of whom have invested in residences and/or businesses in the community. Local residents seem to feel that the expatriates are not very accepting of the predominant Garifuna culture, while some expatriates have complained about noise pollution and lack of zoning codes within the community, particularly at night. There are growing tensions

### Box 1: CONSUMER BEHAVIOUR 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.

regarding the low level of local ownership of tourism businesses and the distribution of benefits between local residents and expatriates. Several expatriates have also reported that they no longer feel safe in Hopkins, as a result of growing incidences of theft, harassment, and other forms of crime.

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. Hopkins residents have access to primary level education in the village. High School and Junior College (first two years of college) is not a mandatory state requirement but, if sought, residents of Hopkins need to travel to Dangriga (20 miles by road) to attend high school and junior college. Like most high schools in the country though, tourism training is very limited; however, tourism management is now being offered at the junior college level. As of 2018, 155 students had graduated from the Stann Creek Ecumenical Junior College's tourism training program; 50 students are currently employed in the sector. If a resident of Hopkins wishes to pursue University training, 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 (formerly Dangriga Hospital) is located in Dangriga Town and has 52 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 specialities: 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 fairly well suited to accommodate Dangriga. However, due to distance, it may not be well suited to accommodate Hopkins, an emerging tourism population center, which is 20 miles away.

Littering, including dirty streets and sidewalks, remains a constant problem in Hopkins. This leads to the perception that Hopkins is a dirty place. There is 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 a vibrant community and also needed infrastructure for tourism.

Hopkins has experienced rapid growth in tourism in recent years. While the destination boasts considerable natural attractions, its vibrant Garifuna culture and well preserved

coastal small village way of life remain one of its most iconic assets for tourism. At a national level, Hopkins is a shining example of cultural tourism. This destination is integrating key aspects of its culture, such as food, music, and dance into experiences, trails and events that all form part of their tourism product. The recommendations captured in this plan aim to build on what Hopkins is doing well.

#### TECHNOLOGICAL FACTORS

Technology is an important 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 Hopkins 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. 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. Hopkins will very soon 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.

The rise of the shared economy and online marketplace and hospitality services that connects people looking to rent their homes with people who are looking for accommodation, e.g., Airbnb and VRBO, are also quickly becoming very popular mediums for promoting alternative accommodation options such as homes, villas, condos and bungalows. The more recent expansion of Airbnb to include curated experiences by locals in destinations reinforces the market's interest in experiential tourism. The impact of the shared economy in Hopkins deserves further attention. Currently, there are about 60-90 listings on VRBO and Airbnb for this destination.

#### ENVIRONMENTAL FACTORS

Major threats to tourism in Belize include hurricanes, tropical storms, and floods. It is important 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 clearly 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. The tourism industry will need to define exactly how it will contribute to this ambitious national goal. Hotels and restaurants will need tools and pointed technical assistance to help them assess their use of single-use plastics, set their internal targets and adopt new practices that will help them to achieve the targets.

Hopkins is faced with a garbage issue. The village is not integrated into the national solid waste management program and consequently does not have any waste transfer station. A village waste collection company is in place but some commercial enterprises and residences do not recycle or properly dispose of their garbage, for example, organic waste, trash from coconut trees, and used cooking oil. The village also lacks a proper sewage system and relies on septic systems.

Other forms of environmental impacts include noise pollution from certain establishments, which affects the experience of hotel guests at night. The indiscriminate cutting down of mangroves related to unregulated developments in the southern part of the village may make the area more vulnerable to storms and could affect fishery nurseries.



The massive influx of Sargassum is reportedly exacerbating the net loss of beach and also affecting certain marine life. While the Sargassum invasion affects the tourism industry on the whole, there is currently a national response. A National Sargassum Task Force has been commissioned to develop and oversee the implementation of an action plan to address the situation. In October 2018, the task force announced a short-term solution for continuous Sargassum clean-up at the main coastal tourism destinations of San Pedro, Caye Caulker, Hopkins, and Placencia. Recently, the Director of Tourism and the Minister of Tourism held a press conference to announce a plan, which will include the government providing funding of 1.2 million dollars. Also, the BTB will forego their collection of about 2.2 million dollars in hotel taxes, which the affected hoteliers will be able to use to address the Sargassum problem on their properties immediately. This consultancy supports the efforts of the national response and recommends robust monitoring to ensure that the funds are used for what is intended.

## LEGAL FACTORS

The legal environment is closely linked with the political environment. The political actors are the ones that are responsible for legislation. 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 tourism. There are many laws that impact 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).

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.

## **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.

### **OTHER MAJOR ISSUES IDENTIFIED**

- 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 the district. Most of the major hotel, resort, and tour operator (and to an extent restaurant) investments have been by expatriates. This has created a situation in which foreign investors with access to outside funding control the tourism sector in Hopkins.

- Increasing prices of fuel, utilities, rent and lower wages are driving up the cost of living and cost of doing business.
- While the government has assigned increased numbers of Police Officers to Hopkins, there is still a great need for a more robust security infrastructure which should address needs for vehicles and other forms of transportation, a police station that can accommodate personnel and vehicles, and contains office space and temporary holding cells.
- 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. One of the current risks identified is that properties have not conducted proper risk assessments to determine how to improve safety and security measures for their guests. Ensuring safety and security of guests is a vital element of delivering quality in tourism.
- As a coastal destination, Hopkins is very susceptible to impacts from natural disasters such as tropical storms and hurricanes. These events can damage or severely damage tourism infrastructure via wind damage, flooding, damage to the road network and electrical grid.

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### 3. The Southeast Coast Tourism Market

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#### 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 STATISTICS<sup>11</sup>**

<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>% CHANGE '17 VS '16</b>
<b>Stann Creek (Dangriga, Hopkins &amp; Riversdale)</b>			
41,393	46,516	59,665	<b>+28.3%</b>
<b>Placencia</b>			
47,144	50,774	63,053	<b>+24.2%</b>
<b>Totals</b>			
<b>88,537</b>	<b>97,290</b>	<b>122,718</b>	<b>+26.1%</b>

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 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%

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<sup>11</sup> Visits to Destination represent overnight arrivals (Source: Belize Tourism Board)

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.

Assessing the data, the Southeast Coast has surpassed Ambergris Caye and Caye Caulker in annual growth of arrivals and now accounts for a large share of Belize's total tourism activities. The overnight sector is very important for the Belize tourism product given that expenditure from this sector is more and has a greater 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 relation to Hopkins specifically, the supply of hotels was 38 and room stock was 363 in 2017. This represented 4.4% of national hotel supply and 4.4% of national room stock, respectively. Within the Southeast Coast, Hopkins accounted for 25.9% of hotel stock and 22.1% of room stock in 2017. Within the "Rest of Stann Creek" (which includes Dangriga but excludes Placencia), Hopkins had 44.2% of hotel stock and 56.3% of room stock. Hopkins is experiencing tremendous growth making it an important destination within the Southeast Coast.

**TABLE 5: TOTAL NUMBER OF HOTELS IN BELIZE & SOUTHEAST COAST<sup>12</sup>**

DESTINATION		YEAR/% OF NATIONAL					
		2015		2016		2017	
<b>Belize – national</b>		<b>850</b>		<b>864</b>		<b>856</b>	
Southeast Coast (Placencia Peninsula and Stann Creek/Dangriga/Hopkins)		247	<b>29.1%</b>	249	<b>28.8%</b>	239	<b>28.0%</b>
	Placencia	156	<b>18.4%</b>	155	<b>17.9%</b>	153	<b>17.9%</b>
	"Rest of Stann Creek"	91	<b>10.7%</b>	94	<b>10.9%</b>	86	<b>10.1%</b>
	Hopkins					38	<b>4.4%</b>
Ambergris Caye		172	<b>20.2%</b>	171	<b>19.8%</b>	169	<b>19.7%</b>
Cayo		125	<b>14.7%</b>	138	<b>16.0%</b>	137	<b>16.0%</b>

<sup>12</sup> 2017 Tourism Indicators (BTB)

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

DESTINATION		YEAR/% OF NATIONAL					
		2015		2016		2017	
<b>Belize – national</b>		<b>7,619</b>		<b>8,282</b>		<b>8,177</b>	
Southeast Coast (Placencia Peninsula and Stann Creek/Dangriga/Hopkins)		1,491	<b>19.6%</b>	1,677	<b>20.3%</b>	1,638	<b>20.0%</b>
	Placencia	842	<b>11.1%</b>	976	<b>11.8%</b>	993	<b>12.1%</b>
	“Rest of Stann Creek”	649	<b>8.5%</b>	701	<b>8.5%</b>	645	<b>7.9%</b>
	Hopkins					363	<b>4.4%</b>
Ambergris Caye		1,898	<b>24.9%</b>	2,237	<b>27.0%</b>	2,086	<b>25.5%</b>
Cayo		1,174	<b>15.4%</b>	1,247	<b>15.1%</b>	1,275	<b>15.6%</b>

A measurement of hotel performance is occupancy rates. In 2017, the “Rest of Stann Creek” (which includes Hopkins) 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 may be the increasing popularity of the sharing economy model (e.g., Airbnb and VRBO) and or the under-reporting of hotel activities to the BTB.

**TABLE 7: HOTEL OCCUPANCY RATES (BTB)**

Destination	2015	2016	2017
<b>Belize – national</b>	<b>42.8</b>	<b>37</b>	<b>39</b>
<i>Placencia</i>	<i>57.7</i>	<i>33.2</i>	<i>31.7</i>
<b><i>Rest of Stann Creek</i></b>	<b><i>47.0</i></b>	<b><i>41.9</i></b>	<b><i>35.5</i></b>
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, we will examine data for Placencia and the "Rest of Stann Creek" (including Hopkins).

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 that 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 8).

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 2017 <sup>13</sup>**

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

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<sup>13</sup> Source: Statistical Institute of Belize via BTB



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 and Relatives	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
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
<b>Average</b>	<b>6.31</b>	<b>6.09</b>	<b>5.70</b>	<b>6.85</b>	<b>6.30</b>	<b>5.85</b>	<b>6.58</b>	<b>6.18</b>	<b>5.77</b>

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 2017<sup>14</sup>. This means that the Southeast Coast (Dangriga/Hopkins/Stann Creek and Placencia) accounted for 20.7% of tourism-related jobs in the country in 2017. Only the Belize District (which

<sup>14</sup> SIB via BTB

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.

**TABLE 10: ACTIVE INSURED PERSONS WITHIN THE TOURISM INDUSTRY  
– STANN CREEK <sup>15</sup>**

Tourism Industry	TOTALS		FEMALE		MALE	
	2016	2017p	2016	2017p	2016	2017p
<b>GRAND TOTAL</b>	<b>3,996</b>	<b>4288</b>	<b>1,541</b>	<b>1,631</b>	<b>2,455</b>	<b>2,657</b>
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

### 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

<sup>15</sup> Ibid.

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**

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

### 3.1.3 Cruise Sector

Harvest Caye is a private island owned by Norwegian Cruise Line (NCL), located in southern Belize, near the Placencia Peninsula. The 75-acre island has been developed as a cruise port and serves as a private destination for ten NCL ships. The cruise port, which welcomed its first guests on November 17, 2016, features an expansive pool with a swim-up bar, salt-water lagoon for water sports, beachside cabanas, a large marina with food and bar area, expansive shopping village, an exclusive 7-acre beach, and exciting shore excursions ranging from zip-lining across the island to snorkelling on the Belize barrier reef.

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) <sup>16</sup>**

<b>Month</b>	<b>Arrivals</b>	<b>Port Calls</b>
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
<b>TOTALS</b>	<b>267,075</b>	<b>84</b>

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. 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.<sup>17</sup>

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<sup>16</sup> Source: BTB

<sup>17</sup> 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.

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 Hopkins Tour Operators**

Tour operators play an important 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 twenty-three (23) BTB registered tour operators from Hopkins. These operators offer a variety of marine and terrestrial tour products as shown in Table 13. Many operators provide their own unique twist to the offerings. For the marine offerings, popular dive and snorkelling sites offshore Hopkins are used most of which have some connection to the Belize Barrier Reef. In terms of the terrestrial tours, popular sites used are the Sittee River, Anderson's Lagoon, Cockscomb Basin Wildlife Sanctuary, and Mayflower Bocawina National Park which are all within the close proximity to Hopkins. However, many terrestrial tour offers extend to other districts, in particular, those that involve archaeological sites and caving.

**TABLE 13: TYPES OF TOUR OFFERINGS**

<b>Marine</b>	<b>Terrestrial</b>
Diving	Hiking
Snorkeling	Rappelling
Spearfishing	Zip-lining
Sportfishing	Caving
Fishing	Birding
Sailing	Wildlife
	River Excursions
	Archaeology
	Cultural Immersion
	Gastronomy

### **3.3 Stann Creek Tour Guides**

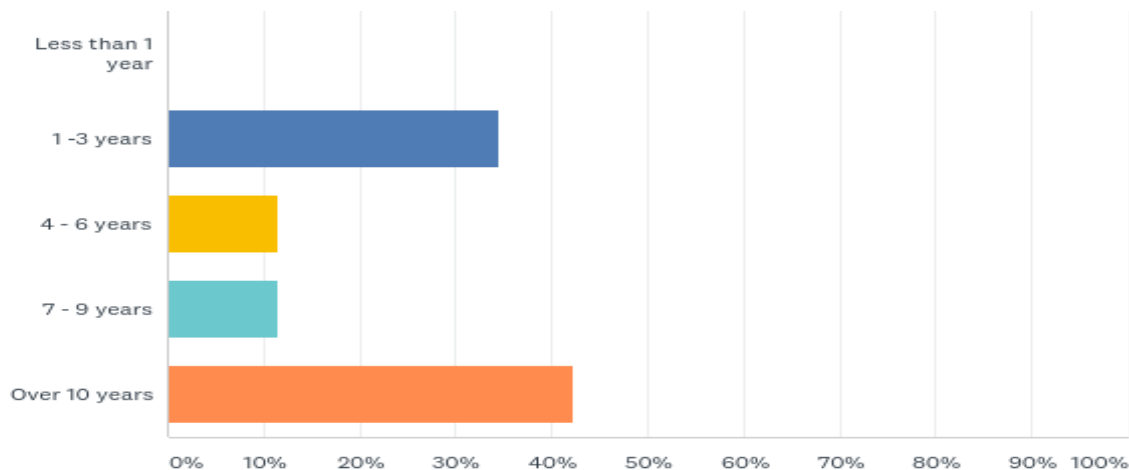
An online survey of licensed tour guides who are residents from the Stann Creek District, which includes the Hopkins Destination, was conducted in order to ascertain basic information on their status and characteristics. This survey was done using convenience sampling which involved obtaining information 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%)<sup>18</sup>. The majority (38%) of the respondents were from Hopkins followed by others 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.

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<sup>18</sup> While the response rate for online surveys is 30%, some research indicate that 10-20% response rate is reasonable.



**FIGURE 9: REGISTERED TOUR GUIDES**



When asked how long they have been a registered tour guide, forty-two percent (42%) of respondents stated over 10 years, thirty-five percent (35%) said between 1 and 3 years, while eleven percent (11%) each said between 4 and 6 years and 7 and 9 years respectively.

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, 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%) conducting 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**

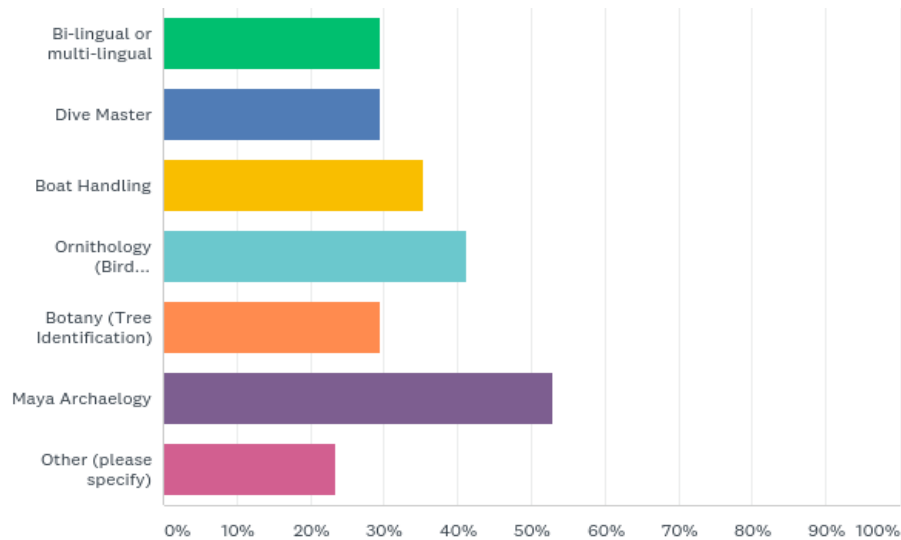


Figure 10 shows the tourism skill set that respondents claim.

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 can 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 may be working for multiple tour operators who do not consider them 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

**Table 14: CPM CRITICAL SUCCESS FACTORS**

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

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 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)<sup>19</sup> to better understand the positioning of each of the main destinations in the Southeast Coast. This assessment helped us to benchmark Hopkins' position in the context of two other destinations-- Placencia and Dangriga. Placencia and Dangriga were selected because of their proximity and similarity in product offerings.<sup>20</sup>

<sup>19</sup> 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.

<sup>20</sup> Ambergris Caye and Placencia are the two most visited coastal destinations and Hopkins is vying for that same market.

The CPM analyzes 12 critical success factors (see Table 14) that are internationally recognized as important to destination management and competitiveness.

These factors were selected based on the stakeholder findings in the assessment phase of the report. These factors emerged in stakeholder interviews, PESTEL analysis, and SCOT analysis. Each of these factors was then 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

The results of the assessment indicate that Hopkins has a higher competitive position than Dangriga but lower than Placencia; it is a more developed tourism destination compared to Dangriga. Hopkins scored particularly well in the areas of its Natural and Cultural Tourism assets and the access to these assets, as well as on considerations of sustainability.

Hopkins is located in close proximity to marine assets and maintains a vibrant Garifuna culture and well preserved coastal small village way of life that remains one of its most iconic assets for tourism. The village offers many cultural activities on a regularly scheduled basis. The asset listing (Appendix 2) shows the vast amount of natural and cultural assets located within the destination.

There are some areas where the destination scored low, however. Hopkins is dealing with early-stage development issues. The destination struggles with marketing, safety and security, and health care access. Given the CPM position, these are areas where strategies will be developed to improve the district's competitive 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 HOPKINS**

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

### 3.5 Profile of Southeast Tourism Product

Of Belize's six districts, Stann Creek is the second smallest with 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 major 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"<sup>21</sup>.

Unlike Ambergris Caye, the Southeast 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 require mitigation of environmental conditions and potential destruction of mangrove areas.

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<sup>21</sup> Source: NSTMP

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

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

Tourism Assets:

- Hopkins provides easy access to some of the beautiful cayes of the south and has ready access to some of the most relevant protected areas like the St Herman's Blue Hole National Park, Five Blues Lake National Park, and Cockscomb Basin Wildlife Sanctuary/Victoria Peak.

Challenges:

- Beach erosion caused by coastal development is a major issue to consider.
- Inadequate basic infrastructure needs to improve to cover growing demand from residents and visitors.
- Increased capacity for energy and water supply services are critical.
- Hopkins does not have a 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.
- Hopkins is located in some of the most highly sensitive natural ecosystems in Belize. At the same time, there is an increasing pressure from the real estate sector to develop the northern and southern areas of the village.

### **3.6 Hopkins Tourism Assets**

Appendix 2 presents an inventory of the major Tourism Assets located in Hopkins. 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 assessment<sup>22</sup> 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 Hopkins tourism assets assessment. Overall, there are thirty one (31) identified tourism assets<sup>23</sup> in the destination. Of these, twenty-eight (28) are actual assets while three (3) are potential assets. The table also shows the breakdown of assets by category and their tourism readiness.

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<sup>22</sup> Assessment was done based on professional judgement, existing knowledge about the asset, and stakeholder discussion.

<sup>23</sup> Only assets with some level of tourism potential have been initially identified.



**TABLE 16: HOPKINS TOURISM ASSETS ASSESSMENT**

<b>Asset Category</b>	<b># Assets</b>	<b>Optimal Readiness</b>	<b>Moderate Readiness</b>	<b>Limited Readiness</b>	<b>Inadequate Readiness</b>	<b>Actual</b>	<b>Potential</b>
Natural	19	9	8	1	1	18	1
Cultural & Heritage	10	4	4	2	0	8	2
Purpose Built	1	1	0	0	0	1	0
Events	1	1	0	0	0	1	0
<b>TOTAL</b>	<b>31</b>	<b>15</b>	<b>12</b>	<b>3</b>	<b>1</b>	<b>28</b>	<b>3</b>

### **3.7 Priority Issues for Tourism Product Development**

Figure 11 shows the results of the problem tree analysis. The most critical problem as expressed by stakeholders in the destination is the lack of a destination brand/identity. This problem exists because of two main issues: 1) lack of unity and cooperation among tourism stakeholders (both locals and foreigners), and 2) destination stakeholders having differing goals for the destination. A shared vision for tourism in this destination does not exist.

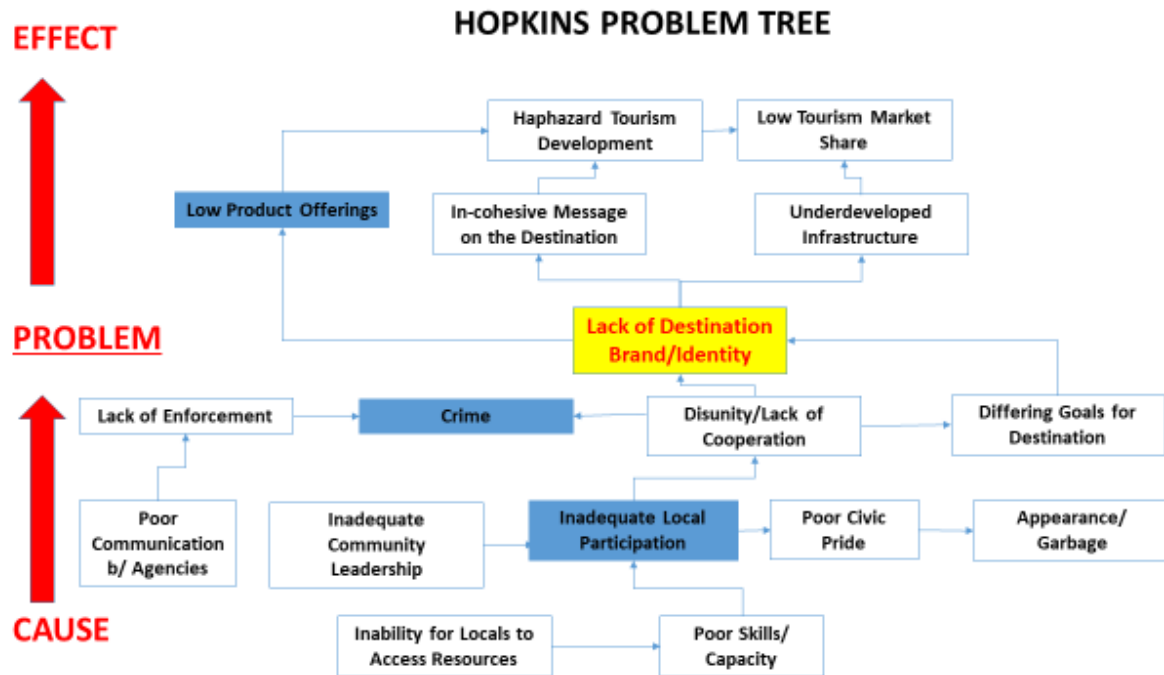
The hospitality sector, through its company-specific marketing efforts, has put Hopkins on the map. Tourism development has occurred rapidly without any destination level planning. The basic infrastructure that existed for a small coastal village is inadequate for a growing destination. The lack of destination level planning and management has contributed to the somewhat haphazard tourism development of the destination. This is what happens in places when there isn't strong local management and development happens before planning. There are also growing tensions regarding the low level of local ownership of tourism businesses and the distribution of benefits to local residents.

The existence of the destination problem has contributed to further issues. First, there are limited product offerings as most of the tourism offer are marine based. Second, the messaging about the destination is not cohesive. For example, in one instance Hopkins is promoted as a tranquil, sleepy village and in other instances as a vibrant tourism hotspot.

Finally, crime has become an issue in the community. There are, however, differing perceptions of the gravity and source of the crime situation. These divergent views have impacted the community's response to the issue as there is no unified approach to

addressing the situation and finding solutions. This situation will negatively impact the destination's identity if it persists.

FIGURE 11: HOPKINS PROBLEM TREE



Upon consideration of these issues, stakeholders through consensus were able to frame and agree on a vision statement and goals for the Hopkins 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 Hopkins. These bottlenecks are divided into the main aspects of product development, distribution and marketing and capacity building.

**TABLE 17: BOTTLENECKS HINDERING HOPKINS' COMPETITIVENESS**

<b>BOTTLENECKS/OBSTACLES</b>
<b><i>Product distribution and marketing</i></b>
<b>Marketing and Promotion.</b> Hopkins lacks a destination brand/identity, which has resulted in limited product offerings (see below) and incoherent messaging about the destination. These issues have contributed to poor or poorly designed marketing efforts resulting in incomplete information provided to tourists and other visitors. Mid to high-end resorts tend to conduct independent marketing of their properties and tours.
<b>Limited Product Offerings.</b> Hopkins has a wide diversity of tourism assets and attractions, but much of this has not been developed into tourism products that could be packaged and marketed to tourists.
<b><i>Infrastructure</i></b>
<b>Waterfront.</b> Hopkin'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 and pedestrian access infrastructure and facilities are needed.
<b>Roads:</b> The road link from Hopkins to Sittee River is in very bad condition, which makes the road access to attractions near to or based from Sittee River difficult. The street that connects the northern and southern points of Hopkins (including the Hopkins "hotel zone") is also in bad condition.
<b><i>Product development and quality assurance</i></b>
<b>Cultural Experiences.</b> Hotel owners state that there is great demand for adventure and cultural tours. Tour options and alternatives in these areas can be expanded.
<b>Hopkins Coastline.</b> The coastline is under-utilized for tourism purposes primarily because of the lack of waterfront infrastructure. The area is also filled with trash. The public-access to the Hopkins coastline is usually dirty. There does not seem to be a reliable garbage collection and disposal system.
<b>Community-based Tourism.</b> Residents of Hopkins do not know how to promote community types of tourism like homestays, cultural tourism, and agro-tourism.
<b>Interpretation at Protected Areas:</b> Sites such as Cockscomb Basin Wildlife Sanctuary and St Herman's Blue Hole National Park, and attractions such as the bioluminescence tour, needs better interpretation and signage, as well as improved visitor facilities, such as trails, and environmentally-friendly public toilets.
<b>Quality assurance.</b> 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.
<b>Cleanliness.</b> Littering is a pervasive problem. There is poor enforcement of littering laws and a low level of civic pride.
<b>Destination Management:</b> Inadequate communication and collaboration among tourism stakeholders.

### 3.9 Strengths and Opportunities

Boxes 3 and 4 below summarize the strengths and opportunities related to tourism development in Hopkins. The analysis helps to clearly and strategically identify what internal strengths and external opportunities can be capitalized in the context of the challenges and bottlenecks outlined in the previous section of the report.

#### Box 3: TOURISM DEVELOPMENT (INTERNAL STRENGTHS)

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

##### Assets & Amenities:

- Hopkins can be accessed quite easily via the Southern Highway.
- There are many natural and cultural attractions located within the village and in close proximity to it.
- Major natural protected areas are easily accessible and located near Hopkins. These include the South Water Caye Marine Reserve, Cockscomb Basin Wildlife Sanctuary, and St Herman’s Blue Hole 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.”
- A spectacular sandy beach that rivals the Placencia beach.
- Annual cultural and culinary festivals and events (such as Mango Fest, Hopkins’ Day).
- Good diversity and range of accommodation options.
- Diverse culinary options, including cultural (Garifuna) culinary specialties.

##### Safety and Quality Assurance:

- There has been some investment in improving basic security infrastructure and the increasing presence of law enforcement officers.
- The destination is more affordable than the other major coastal destinations in Belize, namely, San Pedro and Placencia.

#### **BOX 4: TOURISM DEVELOPMENT (EXTERNAL OPPORTUNITIES)**

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

**Product Development:**

- Hopkins' geographic location gives it access to many iconic natural attractions.

**Market Linkages:**

- The possibility of capturing the sailing market.
- The mid to high-end hotels have (individually) effectively marketed their respective properties and the destination.
- The Southeast Coast can be marketed and promoted as an integrated destination, as per the NSTMP.
- 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 number of hotels and sixth in hotel room stock, and 59,665 overnight visitors (sixth highest).<sup>24</sup>
- The middle to upper middle-class economic groups in Belize are traveling more within Belize. While this market segment is a small one, it can provide important support to the destination, especially during low season and events and festivals.

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<sup>24</sup> 2017 Tourism Indicators (BTB). Hopkins data is combined with other destinations within Stann Creek District excluding Placencia.

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## SECTION 2: THE TDDP

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## 4. Vision for Hopkins' Tourism Industry

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The vision statement for Hopkins expresses the aspirations of a thriving and diverse tourism destination. These aspirations were derived through a multi-step process. The first steps involved understanding the current situation. The results of the Hopkins destination diagnosis, PESTEL analysis, and SCOT analysis provide a comprehensive snapshot of the current state of tourism in Hopkins. 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

***A thriving sandy beach community with diverse world-class marine and jungle eco-tourism attractions providing visitors with authentic and vibrant Garifuna and other cultural experiences in a united, family-friendly, and safe environment.***

### 4.2 Purpose Statements (Goals)

In order to realize the destination vision, Destination Hopkins must invest heavily in creating and delivering new iconic experiences that embrace its local distinctiveness, developing and implementing a branding and marketing strategy, and enhancing the visitor journey through improved quality assurance and security.

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

#### **Thrust 1: Enhancing Meaningful Local Participation**

Developing a sustainable tourism industry requires the inclusion and participation of the local community both to avoid negative effect on the local culture and ensure that community members benefit directly from the growth of the tourism industry. Meaningful inclusion and participation range from ownership of tourism businesses to gainful employment. There is a growing sentiment among residents of Hopkins, that native Belizeans are only benefitting marginally from tourism growth. Hopkins will, therefore, support local entrepreneurship and ensure that the tourism workforce is prepared to compete for higher-level jobs in tourism. This effort emphasizes the need to ensure that local operators and investors (alongside their foreign counterparts) are able to become direct actors and beneficiaries throughout the tourism value chain.



## **Thrust 2: Improving Safety, Security, and Enforcement of Regulations**

Guaranteeing a safe experience to visitors is important to local tourism stakeholders and critical for the sustainability of the sector. The destination will focus on improving all elements of safety and security both for the visitor and community members. Much of this will be realized through the proper enforcement of current regulations that are relevant to the tourism industry.

## **Thrust 3: Developing Branding and Marketing Strategy**

As a rapidly growing destination, Hopkins now needs to ensure that it develops a clear brand identity that resonates with current and emerging market segments. The destination brand is an essential element of differentiating and positioning Hopkins as part of the Belize product. Having a clearly defined brand can help set Hopkins apart from other destinations in the Southeast Coast and the country. The brand also represents the destination's promise to visitors. Development of the brand strategy, therefore, provides stakeholders with an opportunity to refine further their strategy on how to enhance the visitor experience. As a growing destination, Hopkins needs to differentiate its product in order to capture greater market share.

While the branding strategy will help capture what is most iconic about Hopkins, the marketing strategy will help stakeholders to define their priority markets and establish a collective plan for attracting visitors from priority markets. The marketing plan helps tourism stakeholders to think through and agree to specific actions that they can take to more effectively position and promote Hopkins and its iconic experiences. Most importantly, the plan helps stakeholders to define how best to promote the destination in a cohesive and coordinated manner.

## **Thrust 4: Diversifying Tourism Product Offerings**

There is a limited variety of experiences (tours) being offered in Hopkins. Currently, most tours on offer are marine focused. These include mostly short day-trips to nearby islands including the South Water Caye Marine Reserve where visitors can fish, swim or snorkel. Tourism stakeholders realize that there are many other tourism assets that they are not yet tapping. For instance, there are many adventure and nature experiences that can be offered in the many terrestrial and natural attractions such as the bioluminescence lagoon, and new cultural experiences that can be offered around key events such as the International Paranda Music Festival. Hopkins will, therefore, explore and develop new excursions and services in order to diversify its product offerings as part of its development.

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## 5. Objectives and Strategic Actions

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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 sustainable<sup>25</sup>. 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

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<sup>25</sup> UNEP & WTO, 2005. Making Tourism More Sustainable: A Guide for Policy Makers

respecting different cultures and avoiding any form of exploitation. Lastly, it also means 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 Hopkins Tourism Destination Development Plan. The strategic objectives and corresponding activities are presented under their aligned thrusts.

### **Thrust 1: Enhancing Meaningful Local Participation**

#### **Strategic Objective 1: Develop and strengthen local business enterprises**

Sustainable tourism industry in Hopkins will mean that community residents will have the opportunity to invest and grow their own tourism-related businesses in order to benefit from the overall growth in tourism in Belize. Because local residents often lack the skills, experience and finance to start their own business, a program dedicated to supporting their entry or further development in the industry will be established.

- Establish and implement tourism entrepreneurship program

This program will be developed to provide training, support and mentorship to entrepreneurs that have compelling business ideas who aspire to establish micro and small tourism businesses. The program will be designed to attract a cohort of micro and small business entrepreneurs and provide them with technical support and business guidance to take their idea from a concept to business. This can be done on an annual basis and adjusted as needed given the level of interest and success gained.

- Advocate public and private lending institutions for a low-interest lending scheme for tourism at a national level (including Hopkins)

One of the main barriers to entry for local entrepreneurs is the lack of access to financing. Often times the requirements of formal financial institutions such as banks make it difficult for young entrepreneurs to access the finance they need to invest in their businesses. There are public and private lending institutions such as credit unions and the Development Finance Corporation who are able to provide financing to small business owners. Often times, while existing already, the necessary information is not readily available as to the process of applying, the criteria and what financing is available. These types of financial institutions will, therefore, be approached and invited to promote their services to potential entrepreneurs in Hopkins.

- Conduct business management training for local businesses

Local tourism businesses have a higher probability of succeeding if they have the right level of support. Based on initial insights from this assessment there is a great need in helping businesses to develop and price services and offer them at a consistent level of quality. Furthermore, there is a need to help small businesses 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 do not have practical experience in manage a business. Those who venture into 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 ideally positioned to help provide support in this area. A partnership with the SBDC will need to be developed in order to bring their business mentoring and development services to Hopkins entrepreneurs. Their training can be provided on-site through workshops to be offered throughout the year.

## **Thrust 2: Improving Safety, Security, and Enforcement of Regulations**

### **Strategic Objective 2: Strengthen law enforcement capability**

The Hopkins destination has unfortunately recently experienced several high profile crime incidents. Both tourism actors and local community members are concerned by the apparent increase in criminal behaviour in the community. While for the most part, few incidents are occurring, it is evident that if left unaddressed both the community and tourism sector can be impacted negatively. The high profile incidents have triggered attention on Hopkins and law enforcement authorities have increased the number of their personnel within the community. There are however equipment and staffing challenges affect the capacity of law enforcement officers to carry out their duties effectively. At the same time, there are several quick-win actions that can be taken to help ensure a safer destination for residents and visitors.

- Establish a security fund for Hopkins

In the past, the BTB provided funding directly to the Police Department when it had responsibility for the Tourism Police Unit. The Unit now entirely operates under the Police Department, and financial support is provided in a different manner. The Police in Hopkins does receive support from local businesses and individuals in order to carry out their duties. This support needs to be better organized and formalized as many businesses want to contribute and continue to help the police obtain much-needed resources. A security fund for Hopkins will be established and managed by an independent third party, such as the BTIA or similar organization, that has credibility and stakeholder

representation. Proceeds of the fund will be explicitly used to support the police in patrol, surveillance, and crime prevention activities.

- Improve lighting in critical areas in Hopkins

Given that it is a small and developing community, Hopkins has several dark and unlighted areas. 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 identified and lighting conditions assessed in order to improve the lighting in those areas where needed 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.

- Establish a cadre of trained special constables

There are several community members who have been trained in the past by the Police Department to serve as Special Constables. This means that these persons are able to assist the police in carrying out patrols and execute warrants and arrests. These persons, however, are not currently on active duty because the Police Department lacks the resources to cover the cost of their time. These trained persons should be called up and their costs covered by the proceeds of the Hopkins Security Fund will be used for this purpose.

- Install police security cameras in strategic areas

Public surveillance camera systems can be a cost-effective way to deter, document, and reduce crimes. Surveillance cameras in public places can because they can help to ensure public safety. The police can identify criminals recorded with cameras. Police can also both prevent crimes from happening and can quickly solve criminal cases with material evidence obtained from cameras. Similar to the installation of lighting, the installation of cameras will be done after strategic locations have been investigated and identified such as the main exit to the community. The cameras will be monitored by police officers within the Police station.

- Provide additional equipment and vehicles to the police for patrols

Hopkins police currently have limited equipment and vehicles to conduct patrols within and around the community. Their response time is also affected by lack of transportation. The police should, therefore, be provided with additional equipment needed to adequately patrol the community as well as detect, respond to, and investigate crimes that occur within their jurisdiction.

### **Thrust 3: Developing Branding and Marketing Strategy**

#### **Strategic Objective 3: Develop a destination branding and marketing strategy**

Stakeholders confirmed there is no uniformed brand for Hopkins and as such, each industry actor emphasizes different aspects of the Hopkins experience, and therefore there is no cohesive brand identity. This makes positioning the destination in an already crowded marketplace much more difficult.

As a growing destination, it is critical that Hopkins develops its branding and marketing strategy identifying the unique features of Hopkins that presents a unique experience for all visitors needs to be done. Establishing this can be a selling point for all operators and stakeholders and what Hopkins has to offer can be better communicated.

##### **a) Develop a branding strategy**

The continued growth of Hopkins as a tourism destination is contingent on the creation of iconic experiences that resonate with and attract returning and new visitors. In order to attract more visitors, it is important that a destination know what is truly unique about the place. The destination brand communicates the single-minded idea that sets Hopkins apart from its competition, and at the same time, illustrates all the little things that make the destination a one-of-a-kind experience (or iconic). The brand captures the colorful characters, adventure and rich mental imagery of the place.

The first step in developing a brand for Hopkins entails conducting a consumer analysis to identify priority market segments for today and the future. Second, unique features and attributes the destination will be identified. Competitive positioning strategies will be developed. Key outputs of the brand development process will include a destination logo and tagline that reflects the values and attributes of the destination. Since Hopkins is a sub-brand of the Belize brand that the BTB manages, it will be important for Hopkins to coordinate this effort closely with the BTB. They may even be able to provide technical assistance for this effort. This initiative will include the following activities:

1. Identify the brand opportunity: consumer analysis and competitive positioning;
2. Define the brand identity and strategy;
3. Develop symbolic representation of the destination; and
4. Implement brand strategy.

##### **b) Develop and implement a marketing strategy**



Hopkins currently has a lower market share than neighbouring Placencia 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 actively share responsibility for its implementation.

The marketing plan will set goals for growth in overnight and domestic visitation. The marketing plan will include practical strategies for communicating Hopkins'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 Hopkins 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.

#### **Thrust 4: Diversifying Tourism Product Offerings**

##### **Strategic Objective 4: Improve Hopkin's community infrastructure**

Hopkins has been experiencing rapid tourism growth in recent years. This growth has increased the demand for infrastructural resources and other services which are now determined to be inadequate to meet the needs of the residents and visitors. Infrastructure does not only help to improve access to public services and improve the physical conditions of a destination but also affects the experiences of visitors. Furthermore, infrastructure development helps to facilitate economic activities which in turn can have a positive impact on the growth of the destination overall. Improvements in infrastructure will require the participation of several essential government agencies. Given this scenario, it is imperative for the destination to seek funding and resources for several infrastructural investments and upgrades.

- Provide adequate and standardized signage

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

- Develop a community master plan for Hopkins

The development of tourism facilities including resorts and accommodations within the community is currently happening in a haphazard manner as there is no land use plan or zoning in order to have order to the layout of the community. Already some conflicts between different users are beginning to emerge. Even though Hopkins is an emerging tourism destination, it remains home to many residents and so this balance between the need of residents, developers and visitors need to be managed more proactively. This can be done by developing a community master plan and zoning. This can help to ensure that the Hopkins 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 location of certain activities including businesses, accommodations, bars and clubs, residences and other public use areas.

One vital public facility that needs to be put in place are resting areas and public restrooms. As the destination develops, it will need to be more visitor friendly and having these basic amenities will make the visitor more comfortable. Hopkins is developing into a daily visit community whether for work or leisure. This means that they need to have as many convenient amenities as possible.

- Advocate for the establishment of financial services in the community

It is essential that financial services are available within the destination of Hopkins. At the moment, there are no ATM's in Hopkins. Residents and visitors must travel to Dangriga Town to conduct banking transactions. Visitors have often complained about the lack of ATM services and have to be carrying around cash when in the community. The establishment of financial services within the community would not only be beneficial to visitors but also to residents and local businesses. There is an opportunity for a branch of a local bank or credit union to be established within the Hopkins community. This is what will be advocated for in order to ensure that the requisite infrastructure for the development of the destination is in place.

- Complete paving of the main road

The main street that runs through the length of Hopkins Village is actually part of the main road that runs down towards Sittee River. The portion of this road within has been paved. As there are many other properties and tourist accommodations towards the

unpaved section, it is important that the upgrade to this road is completed. The completion of the road to Sittee River would be ideal as it would create a loop back to the Southern Highway which would make it easier to access Hopkins from both the northern and southern ends. Additionally, many visitors prefer to bike around Hopkins, and this should be encouraged with the construction of bike paths in the main part of Hopkins.

- Construct a community pier with docking facilities

Currently, there is no public dock in Hopkins. Given the popularity of marine activities, it is crucial to constructing a community pier with docking facilities. The pier can also be built to serve as a marina that can accommodate boats and yachts. This will help Hopkins to venture and expand into the nautical aspect of tourism.

- Promote the establishment of a gas station in Hopkins

Tourism services in Hopkins are heavily reliant on gas or petrol, especially for tour vehicles and boats. This high consumption of fuel is not currently being met locally, and drivers and boaters must access the nearest gas station which is several miles away at Mile 6 on the Hummingbird Highway. This certainly increases the cost of doing business due to the need for travel to obtain gas as well as other inefficiencies this introduces in the value chain. The establishment of a gas station within or near Hopkins along the Southern Highway is a much needed service to support the tourism industry in the community.

- Increase public transportation to Hopkins

There is currently only one bus service coming through Hopkins village. With the growth in tourism and movement of workers, there is a need to increase the number of public transportation services to the village. This will help not only local workers who come in and out of the village but also free and independent travellers who prefer to use public transportation to move around during their travels.

- Build a well-equipped (equipment & human resources) health center

An important aspect of ensuring quality visitor experience is to ensure that medical services are available especially in times of emergency. However, this is important to the visitors as well as to the locals who work and support the local tourism industry. It is therefore important to ensure that access to quality health services is continuously available and current services are improved.

As the local population of Hopkins and number of visitors continue to grow, Hopkins will need to have a well-equipped health center to provide quality care to both residents and visitors alike. There is a health center currently in Hopkins, but it only offers limited services. The health center will need to be upgraded or another one constructed in order

to have its services expanded. This means having medical personnel on hand 24 hours a day as well as having adequate equipment to provide critical medical services.

- Establish a central produce market

Given the increase in tourism accommodations and restaurants and an increase in population due to migration for work, Hopkins is a growing market for fresh fruits and vegetables. Hopkins has never had a central produce market and retailers of fresh fruit and vegetables simply go around to individual businesses and homes to sell their products. A produce market in Hopkins would provide a place where residents and visitors could access fresh fruits and vegetables. The market would also provide a central meeting place where residents can interact building a greater sense of community and contributing to the cultural brand of the destination. An ideal location for a central produce market will, therefore, be identified and will be constructed for this purpose.

A new fire station will need to be built in Hopkins village. This will improve access to critical support in the event of a fire. Fires in the past in Hopkins village have resulted in total loss. This can be prevented or minimized with having a fire service available within the village. The fire service will need fire-fighting equipment including a fire truck as well as a building to house the fire station.

- Conduct beach and community cleanup campaigns

Given that the Hopkins beach is one of the major assets and attractions of Hopkins, a program of maintenance will be developed and regular beach clean-up campaigns will be carried out, not just to remove unwanted litter but also to foster a sense of community stewardship. Similarly, it is crucial for health and aesthetic reasons to maintain a very clean community. Community clean-up campaigns will, therefore, be carried out regularly to ensure that the community is kept litter free and more attractive for visitors and residents.

### **Strategic Objective 5: Enhance portfolio of destination product offerings**

The portfolio of product offerings of the Hopkins destination will need to be developed further 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 wide opportunities to expand on the internationally-recognized Garinagu culture, marine-based activities including beach activities and pier development.

- Develop iconic Garifuna cultural attractions and experiences

Similar to Dangriga, Hopkins is historically a Garinagu village. The Garinagu people has 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.

The cultural heritage and culture of the Garinagu are one of the iconic aspects 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 Garifuna 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.

- Offer opportunities for travelers to help support retention of Garifuna culture

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 growth 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.

Resources for helping retain Garifuna culture could be provided through a destination level Travelers' Philanthropy program in which participating hotels and tour operators connect their guests to an online destination giving portal/website. The BTIA or another NGO can serve as a steward of the portal and funds. Annual reporting could be provided online to highlight the projects that the fund supported and main outcomes of the projects.

- Develop local crafts and souvenirs based on Garifuna culture and history

As the destination grows, it is crucial to help ensure that there are opportunities to increase their expenditures through shopping. The creative sector and in particular arts, crafts and souvenirs can help create new opportunities for micro-entrepreneurs to participate in the development of the destination and also enhance the visitor experience. The local crafts and souvenirs will contribute to the authenticity of the indigenous culture of the Garifuna being showcased.

- Expand current marine and terrestrial experiences

The sea is one of Hopkin's biggest asset and most of the tourism experiences (tours) offered are marine based. These experiences include activities such as fishing, snorkelling, and diving which are the most common activities at the moment. New adventure experiences around paddle boarding, windsurfing, sailing, live aboard yachting and sports fishing can be developed. A pier with adequate docking facilities will be needed in order to encourage community members to consider offering some of these marine adventure activities.

On the terrestrial side, forest-based activities are much more 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 including birding, wildlife, night walks, hiking, camping, caving, waterfall, and river tubing.

The development of these new activities is linked 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.

- Developing the beach experience and other day tours

Aside from the sea being one of its main assets, Hopkins also boasts a spectacular beach. The beach provides an opportunity for visitors to relax by the sea and even interact with community members. Beach-based activities can include music, sports and culinary activities. These activities will need to be planned and marketed as part of the overall strategy to make Hopkins a daily destination for visitors.

Aside from developing sites in the vicinity of Hopkins to expand the scope of services provided, the stakeholders want Hopkins itself to be a tourism site for day tours. This will result in other destinations using Hopkins as a place to take their guests on day tours. This would mean, however, developing Hopkins to the point where it is able to meet the demands of visitors in providing a truly unique community experience. There are several cultural aspects that already makes Hopkins a unique site to visit, and this can be further enhanced in order to attract visitors from other destinations.

- Assess Hopkins marine based and jungle-based tourism assets

The medium and long-term plan for the development of Hopkins' tourism assets should be based on a comprehensive asset assessment. This exercise should encompass the following actions: identifying potential tourism assets, visiting the assets, geo-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.

### **Strategic Objective 6: Strengthen human resource capacity in tourism services**

Having a cadre of well-trained personnel is critical to the development of high quality produce for the Hopkins destination. While there are many persons working in the tourism sector in Hopkins providing good quality services, 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 guiding. There are now several specialities that can be pursued which would make the guide more effective in service delivery.

#### **a) Provide continuous training in hospitality management and frontline services**

There is a need to ensure that persons working in hospitality especially those on the front line to have the right level of skills, especially in customer service. Guests are looking for an enjoyable experience, and the person on the frontline helps to meet this expectation of the guest by understanding what and how to provide the support the guests need during their stay. There are a few educational institutions such as Ecumenical High School and Sixth Form and Georgetown Vocational High School that are providing tourism training in the region. The programs at these schools will need to be assessed for relevance and expanded to ensure that it is meeting the demands of the market and businesses in the area.

#### **b) Provide training in tour guiding including in specialty areas**

There are a limited number of tour guides in Hopkins and if excursions are to be expanded as part of the development of the destinations, these front line service providers will 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 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 Hopkins or nearby in order for residents to take advantage of the training opportunity provided.

## 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 Hopkins will provide.

**TABLE 18: HOPKINS PRIORITY INVESTMENT PROPOSALS**

Hopkins priority investment proposals				
Project Ideas	Description	Target Date	Responsible Party	Projected Cost (BZ\$) (Indicative) <sup>26</sup>
Hopkins Cultural Trail (Experiential Excursions)  • Thrust 3 & 4 • Primary Strategic Objectives: 5a • Secondary Strategic Objectives: 3a, 3b, 4j, 5c, 5e, 6a, 6b	<ul style="list-style-type: none"> <li>Investment needs include: Marketing/branding strategy</li> </ul>	July 2020	BTB	\$20,000
	<ul style="list-style-type: none"> <li>Training in hospitality, artisanal works, and other</li> </ul>	May 2020	BTB	\$10,000
	<ul style="list-style-type: none"> <li>Development of tour scripts for tours and museum and other</li> </ul>	May 2020	MTCA and BTB	\$5,000
	<ul style="list-style-type: none"> <li>Training for cultural performances</li> </ul>	June 2020 and ongoing	BTB	\$15,000
	<ul style="list-style-type: none"> <li>Remodeling of the Hopkins Community Centre Cultural Centre. A space for events, interpretive signs, and night time illumination, will need to be done; and</li> </ul>	July 2020	BTB	\$50,000

<sup>26</sup> These are very broad cost projections and should not be considered accurate.

Hopkins priority investment proposals				
	special training of local tour guides in conducting tours.	July 2020	BTB and BTIA-OW	\$5,000
Lebeha Drumming Centre <ul style="list-style-type: none"> <li>• Thrust 3 &amp; 4</li> <li>• Primary Strategic Objectives: 5a</li> <li>• Secondary Strategic Objectives: 3a, 3b, 5b</li> </ul>	The drumming center is currently based in a very modest thatch structure. Investment needs include: 1) construction/ remodeling of a proper building with office and other associated facilities, and 2) procurement of guitars, Garifuna drums, and other percussion instruments.	June 2021	BTB, NICH	\$150,000
River Tours <ul style="list-style-type: none"> <li>• Thrust 4</li> <li>• Primary Strategic Objectives: 5d</li> <li>• Secondary Strategic Objectives: 4j, 5f</li> </ul>	Improvements of boat docking facilities along Sittee River, pedestrian access and pathways along the river banks, riverfront access.	March 2022	BTB, MTCA, IDB	\$400,000
Garifuna Dances <ul style="list-style-type: none"> <li>• Thrust 3 &amp; 4</li> <li>• Primary Strategic Objectives: 5a</li> </ul>	The Lufuri Hopkins (youth dance group) and other groups continue to practice the art of Garifuna music and dances. These dance troupes need properly designed and manufactured garments and accessories, as well as training in choreography, the art of the dance, marketing, and other related skills.	March 2020	BTB	\$20,000

Hopkins priority investment proposals				
<ul style="list-style-type: none"> <li>Secondary Strategic Objectives: 3a, 3b, 5b</li> </ul>				
Garifuna Cuisine <ul style="list-style-type: none"> <li>Thrust 4</li> <li>Primary Strategic Objectives: 5a</li> <li>Secondary Strategic Objectives: 4i, 6a</li> </ul>	Culinary and food art training in the preparation and presentation of meals with a Garifuna theme or fusion. Training in menu preparation and food costing techniques.	June 2020	BTB	\$20,000
National Parks and Reserves <ul style="list-style-type: none"> <li>Thrust 4</li> <li>Primary Strategic Objectives: 5d</li> <li>Secondary Strategic Objectives: 5f</li> </ul>	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 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	December 2021	Belize Audubon Society, Protected Areas Conservation Trust, BTB	\$5,000,000

Hopkins priority investment proposals				
	attractions (such as waterfalls) and stairways are also needed at the reserves/parks. <sup>27</sup>			
Archaeological Sites  <ul style="list-style-type: none"> <li>• Thrust 4</li> <li>• Primary Strategic Objectives: 5d</li> <li>• Secondary Strategic Objectives: 5a</li> </ul>	Improvements such as perimeter fencing, facilities for ticket sales and for a site guard, walkways to the structure and defined stairways, a space for events, night time illumination.	May 2022	NICH, MTCA	\$100,000
Festival Series  <ul style="list-style-type: none"> <li>• Thrust 3 &amp; 4</li> <li>• Primary Strategic Objectives: 5a</li> <li>• Secondary Strategic Objectives: 3a, 3b, 5b, 5c</li> </ul>	A Festival Series that incorporates and calendarizes the various events that take place annually in Hopkins. Marketing/promotion, as well as festival planning and budgeting will be carried out.	Various	BTB, NICH, and Dangriga-Chapter	\$10,000 per festival
Signage  <ul style="list-style-type: none"> <li>• Thrust 4</li> <li>• Primary Strategic Objectives: 4a</li> </ul>	Well-designed welcoming, directional (way-finding), and location signs within and near Hopkins, nearby villages and Dangriga Town to facilitate visitors during their stay: 2 entering the village, 5 around the village, 2 leaving the village, and 24 directional signs.	June 2019	BTB	\$20,400

<sup>27</sup> Note: This priority investment proposal is also included in the Dangriga TDDP, given the proximity of these national parks and reserves to both destinations. This investment would obviously only need to be made once.

Hopkins priority investment proposals				
<ul style="list-style-type: none"> <li>Secondary Strategic Objectives: 4d</li> </ul>				

As the private sector tourism umbrella organization, the BTIA can provide leadership via its chapter in Hopkins 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 Hopkins destination should consider the following guidelines regarding tourism funding:

- Hopkins 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;
- 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 major 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**

<b>Commercial Banks</b>	<b>Credit Unions</b>
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: HOPKINS PRIORITY PRODUCT CLUSTERS**

Product Cluster	Description	Itinerary
<p>Hopkins Cultural Experience (Experiential Excursions)</p> <ul style="list-style-type: none"> <li>• Thrust 3 &amp; 4</li> <li>• Primary Strategic Objectives: 5a</li> <li>• Secondary Strategic Objectives: 3a, 3b, 4j, 5c, 5e, 6a, 6b</li> </ul>	<p>The Hopkins Cultural Experience is designed to highlight the key aspects of Hopkins Garifuna culture, including a Garifuna museum, cultural dances, traditional cuisine, agritourism, as well as religious rituals.</p>	<p>Excursion options may focus on any the following, or a combination:</p> <ol style="list-style-type: none"> <li>1. Gastronomy (traditional cuisine)</li> <li>2. Historical/Cultural</li> <li>3. Religious/spiritual ceremonies</li> <li>4. Music and dance</li> <li>5. Drumming lessons</li> <li>6. Archaeological (Serpon)</li> <li>7. River tours/wildlife viewing</li> </ol>
<p>Pesca Tours</p> <ul style="list-style-type: none"> <li>• Thrust 3 &amp; 4</li> <li>• Primary Strategic Objectives: 5a, 5e, 6b</li> <li>• Secondary Strategic Objectives: 3a, 3b, 4e, 5b, 5d</li> </ul>	<p>A tourism offering that involves taking visitors on guided tours to experience a day in the life of traditional fisher folks.</p>	<p>An all-day activity, with tours leaving early in the morning and returning in the early afternoon. The tour ends with the afternoon spent with the fisherman's family for either lunch or dinner.</p>
<p>Lebeha Drumming Center</p> <ul style="list-style-type: none"> <li>• Thrust 3 &amp; 4</li> <li>• Primary Strategic Objectives: 5a</li> <li>• Secondary Strategic Objectives: 3a, 3b, 5b</li> </ul>	<p>The Lebeha Drumming Centre was established in 2002 by Jabbar Lambey and Dorothy Pettersen, in Hopkins, Belize. The center exists with the goals of keeping Garifuna music alive, passing traditional music along to young people in the community, and sharing music with visitors to Hopkins. The center's focus is on traditional percussion music, though guitars</p>	<p>The main feature of this product cluster is to learn the basic tenets of Garifuna traditional and modern music. Visitors comes to Hopkins with this as the focus of their travel but take advantage of the other available tourism products.</p>

Product Cluster	Description	Itinerary
	have been donated and are also played.	
River tours <ul style="list-style-type: none"> <li>• Thrust 4</li> <li>• Primary Strategic Objectives: 5d</li> <li>• Secondary Strategic Objectives: 4j, 5f</li> </ul>	Tours on skiffs or pontoons on the Sittee River, and nearby lagoons.	Excursion options include: <ol style="list-style-type: none"> <li>1. Birdwatching or wildlife viewing tours (including night-time crocodile watching)</li> <li>2. Bioluminescence tour</li> <li>3. Evening dining on the river</li> <li>4. Sports fishing tours (e.g., trolling for snook or tarpon)</li> </ol>
Garifuna Dances <ul style="list-style-type: none"> <li>• Thrust 3 &amp; 4</li> <li>• Primary Strategic Objectives: 5a</li> <li>• Secondary Strategic Objectives: 3a, 3b, 5b</li> </ul>	The Lufuri Hopkins (youth dance group) and other groups continue to practice the art of Garifuna music and dances. These dance troupes need properly designed and manufactured garments and accessories, as well as training in choreography, the art of the dance, marketing, and other related skills.	The main feature of this product cluster is to learn the basic tenets of Garifuna music and dance. Visitors come to Hopkins with this as the focus of their travel but take advantage of the other available tourism products.
Garifuna Cuisine <ul style="list-style-type: none"> <li>• Thrust 4</li> <li>• Primary Strategic Objectives: 5a</li> <li>• Secondary Strategic Objectives: 4i, 6a</li> </ul>	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), hudutu (fish soup), or bundiga.	The main feature of this product cluster is to experience Garifuna cuisine. Foodies come to Hopkins with this as the focus of their travel but take advantage of the other available tourism products.
Festival Series and Events <ul style="list-style-type: none"> <li>• Thrust 3 &amp; 4</li> <li>• Primary Strategic Objectives: 5a</li> <li>• Secondary Strategic Objectives: 3a, 3b, 5b, 5c</li> </ul>	Cultural and traditional festivals include Hopkin's Day (End of July), Mango Fest (May/June), Garifuna Settlement Day (November 19), Paranda Fest, Dugu Ceremony, and Jancuno.	Based on the dates of the specific events, which take place mostly within Hopkins.

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## 7. Management Arrangements

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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 Hopkins 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 Hopkins 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 Hopkins Town Council:

- The Councilor with tourism portfolio shall be assigned to sit on the TDDP MCC.
- The Hopkins Town Council shall integrate relevant components of the TDDP into its annual work plans and budgets.
- As such, the Hopkins 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 (Hopkins 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 Hopkins in line with the implementation of the NSTMP, and the Hopkins TDDP.

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## 8. Coordination and Monitoring

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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 Hopkins TDDP.

Strategies	Monitoring Indicators
<b>Strategy 1</b> Develop and strengthen local business enterprises	<ul style="list-style-type: none"> <li>• Number of new local tourism businesses registered and operating</li> </ul>
<b>Strategy 2</b> Strengthen law enforcement capability	<ul style="list-style-type: none"> <li>• % decrease in the incidences of reported serious crimes in the village</li> <li>• Police response rate to reported crimes</li> <li>• Numbers of arrests &amp; citations</li> </ul>
<b>Strategy 3</b> Develop a destination branding and marketing strategy	<ul style="list-style-type: none"> <li>• Increase awareness about Hopkin's destination brand</li> <li>• Number of promotional items that mention the destination</li> <li>• Social media reach</li> <li>• Increase in the number of visitors to the destination</li> </ul>
<b>Strategy 4</b> Improve Hopkin's Community Infrastructure	<ul style="list-style-type: none"> <li>• Increase in number and use of community infrastructure</li> <li>• % of tourism assets demarcated</li> <li>• Miles of road improved</li> <li>• At least one financial institution providing direct service to the community</li> </ul>
<b>Strategy 5</b> Enhance portfolio of destination product offerings	<ul style="list-style-type: none"> <li>• % increase in the number and variety of tourism product offers in the destination</li> </ul>

Strategies	Monitoring Indicators
<p><b>Strategy 6</b></p> <p>Strengthen human resource capacity in tourism services</p>	<ul style="list-style-type: none"> <li>• Number of women/men/youths who receive tourism training</li> <li>• Number of specialized training conducted</li> </ul>

10. Implementation Schedule

The following table shows the timetable for accomplishing the strategic priorities of the Hopkins TDDP. It includes the strategies, key activities, timeframe<sup>28</sup>, and responsible party. A budget for these activities should be developed on an annual basis by the responsible parties when more detailed 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. Develop and strengthen local business enterprises	• Establish and implement tourism entrepreneurship program		X	X	X	X																
	• Advocate public and private lending institutions for a low interest lending scheme for tourism at a national level (including Hopkins)	X	X	X	X	X	X	X	X													
	• Conduct business management training for local businesses		X	X			X	X			X	X			X	X		X	X			

<sup>28</sup> Displayed by year and quarter.











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## SECTION 3: APPENDIX

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Section 3: Appendix

## **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 Hopkins 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, Draft Hopkins Strategic 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 Hopkins 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

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### **Hopkins Tourism Destination Development Plan**

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 21 shows the sub-sector categorization of tourism stakeholders.

**TABLE 21: STAKEHOLDER SUB-SECTORS**

<b>Sector</b>	<b>Group</b>
1. Culture	Artisans, Dancers, Music, Assns.
2. Hoteliers /Food & Beverage	Registered hotels, Bars, Restaurants,
3. Tour Guides/Operators	Registered guides & operators
4. 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 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 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 Hopkins. 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

<b>Optimal</b>	-	From 80 to 100 points
<b>Moderate</b>	-	From 61 to 79 points
<b>Limited</b>	-	From 41 to 60 points
<b>Inadequate-</b>		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"> <li>1. System to monitor and publicly report visitor satisfaction in place. (3 points)</li> <li>2. Must demonstrate local community benefits. (3 points)</li> <li>3. Measures in place to preserve, protect, and enhance natural and cultural assets. (2 points)</li> <li>4. Must engage in ecofriendly tourism practices. (1 point)</li> <li>5. Of the total employee base, at least 80% must be resident or Belize national. (1 point)</li> </ol>	3.0



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



### Appendix 3 – Hopkins Tourism Assets

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

Hopkins Assets	Description of Assets	Tourism Purpose	Tourism Readiness
<b>Natural Tourism Resources</b>			
1. Maya Mountains	<ul style="list-style-type: none"> <li>Range of hills mostly in southern Belize, extending about 70 miles (115 km) north-eastward from across the Guatemalan border into central Belize.</li> <li>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.</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>M</li> </ul>
2. Victoria Peak	<ul style="list-style-type: none"> <li>Situated in the Cockscomb Basin Wildlife Sanctuary and is the second highest mountain in Belize.</li> <li>Was pronounced a natural monument in 1998.</li> <li>Dry Season/Permits needed by the Forestry Department.</li> <li>Contains nature trails and hiking paths.</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>M</li> </ul>

Hopkins Assets	Description of Assets	Tourism Purpose	Tourism Readiness
3. Beach	<ul style="list-style-type: none"> <li>The beach and nearshore benthic substrate (sea bottom sediments) is composed of terrigenous sands (from rivers and shore erosion) and silts with no coarse sand component.</li> <li>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, sea grass banks and degraded coral patch reefs.</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>M</li> </ul>
4. Atolls	<ul style="list-style-type: none"> <li>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.</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>O</li> </ul>
5. Tobacco Caye	<ul style="list-style-type: none"> <li>Lies within the South Water Caye Marine Reserve about 10 miles (16 kilometres) east of Dangriga.</li> <li>Approximately three acres (1.2 hectares) in area, shaped like an egg, with a north-south dimension of about 240 m (260 yd) and an east-west dimension of 125 metres (137 yards).</li> <li>Privately owned and used for fly-fishing, diving, and camping.</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>M</li> </ul>
6. Bread and Butter Caye	<ul style="list-style-type: none"> <li>Private Island.</li> <li>Lots of Rays and Fish</li> <li>Divers use site.</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>M</li> </ul>

Hopkins Assets	Description of Assets	Tourism Purpose	Tourism Readiness
7. Thatch Caye	<ul style="list-style-type: none"> <li>Private Island.</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>O</li> </ul>
8. Coco Plum Caye	<ul style="list-style-type: none"> <li>Private Island.</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>O</li> </ul>
9. Sittee River	<ul style="list-style-type: none"> <li>Located in central Belize, the mangroves located at the mouth of this river are the tallest ever reported for the Caribbean region and among the tallest anywhere in the entire Neotropics.</li> <li>The mouth of the Sittee River represents the optimal conditions for mangrove development and the forest found there has a high level of structural development. Freshwater flows and sediments carried by the river itself, draining from the Maya Mountains, and tidal flushing from the Caribbean Sea all support this tree growth.</li> <li>The forest at the mouth of the river is composed of three mangrove species: red mangrove (<i>Rhizophora mangle</i>), white mangrove (<i>Laguncularia racemosa</i>), and black mangrove (<i>Avicennia germinans</i>).</li> <li>Used for river tours, bird, iguana, and crocodile watching.</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>L</li> </ul>
10. Freshwater Creek	<ul style="list-style-type: none"> <li>The estimate terrain elevation above sea level is 15 metres.</li> <li>Located near Silk Grass Village.</li> <li>Historic - Mud to make houses and temples and trees for fire heart.</li> <li>Used by local hunters.</li> </ul>	<ul style="list-style-type: none"> <li>Potential</li> </ul>	<ul style="list-style-type: none"> <li>I</li> </ul>
11. Palmento Lagoon	<ul style="list-style-type: none"> <li>Canoes, Fishing within village.</li> <li>Located North-West Side of Hopkins.</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>M</li> </ul>

<b>Hopkins Assets</b>	<b>Description of Assets</b>	<b>Tourism Purpose</b>	<b>Tourism Readiness</b>
12. Maya King	<ul style="list-style-type: none"> <li>Privately owned waterfall that allows for zip lining and horseback riding in South Stann Creek.</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>O</li> </ul>
13. Anderson Lagoon	<ul style="list-style-type: none"> <li>Bioluminescence features.</li> <li>Used for night tours.</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>O</li> </ul>
14. Cockscomb Basin Wildlife Sanctuary	<ul style="list-style-type: none"> <li>Nature reserve established 1986 to protect the forests, fauna and watersheds of an approximately 400 square kilometers (150 sq mi) area of the eastern slopes of the Maya Mountains.</li> <li>First protected area for protection of the jaguar (<i>Panthera onca</i>).</li> <li>Co-managed by Belize Audubon Society.</li> <li>Comprised by 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.</li> <li>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.</li> <li>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</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>M</li> </ul>

Hopkins Assets	Description of Assets	Tourism Purpose	Tourism Readiness
	<p>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 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"> <li>• Trails, River Tubing, Camping, Birding.</li> </ul>		
15. Mayflower Bocawina National Park	<ul style="list-style-type: none"> <li>• National Park established in 2001, this national park boast a vast quantity of Flora and Fauna.</li> <li>• Co-managed by Mayflower Bocawina Environmental Development Group.</li> <li>• Lies about 16 miles southwest of Dangriga and 12 miles northwest of Hopkins.</li> <li>• 11-sq-mile park of jungle, mountains, waterfalls, walking trails, swimming holes and small Maya sites</li> </ul>	<ul style="list-style-type: none"> <li>• Actual</li> </ul>	<ul style="list-style-type: none"> <li>• O</li> </ul>
16. Gladden Spit and Silk Cayes Marine Reserve	<ul style="list-style-type: none"> <li>• Marine protected area established in 2003 in the central part of Belize's Barrier Reef.</li> <li>• Co-managed by Southern Environmental Association.</li> <li>• It covers approximately 25,980 acres (10,510 ha) lying 36 kilometres (22 mi) off the coast of Placencia.</li> </ul>	<ul style="list-style-type: none"> <li>• Actual</li> </ul>	<ul style="list-style-type: none"> <li>• O</li> </ul>

Hopkins Assets	Description of Assets	Tourism Purpose	Tourism Readiness
	<ul style="list-style-type: none"> <li>Gladden Spit is a promontory forming the southernmost tip of the sunken atoll. The spit has a short sloping shelf that drops off steeply at about 40–2000 metres in depth within 10 kilometres (6.2 mi) of the reef.</li> <li>Three small cayes: North Silk, Middle Silk and South Silk, lie south of Gladden entrance just inside Queen Caye.</li> <li>The reserve contains some of the healthiest parts of the reef system due to its elevation and good water quality. Gladden Spit itself hosts over 25 species of reef fish.</li> <li>Used for diving, snorkelling, and viewing the whale shark.</li> </ul>		
17. South Water Caye Marine Reserve	<ul style="list-style-type: none"> <li>Second largest marine reserve established 1996 covering 117,875 acres (approximately 47,700 hectares)</li> <li>Managed by the Fisheries Department.</li> <li>The sheltered waters and mangrove systems of the Pelican cayes in the southern area of the Marine Reserve have been identified as one of the most bio diverse marine systems within the western hemisphere, supporting a number of endemic species, and species new to science.</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>O</li> </ul>
18. Glover's Reef Marine Reserve	<ul style="list-style-type: none"> <li>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.</li> <li>Managed by the Fisheries Department.</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>M</li> </ul>

Hopkins Assets	Description of Assets	Tourism Purpose	Tourism Readiness
	<ul style="list-style-type: none"> <li>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.</li> </ul>		
19. Home to numerous animal species	<ul style="list-style-type: none"> <li>Jabiru Stork</li> <li>Peccary</li> <li>White-tailed Deer</li> <li>Numerous bird species 500+</li> <li>Howler monkey &amp; Spider monkey</li> <li>Tapir</li> <li>Cat Species (Jaguar, Puma, Jaguarundi, Ocelot &amp; Margay)</li> <li>Morelet's Crocodile</li> <li>Gibnut &amp; Agouti</li> <li>Numerous fish species (Tarpon, Bonefish, Permit, Snook, Tarpon...etc.)</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>O</li> </ul>
<b>Cultural and Heritage Resources</b>			
1. Hopkins Village	<ul style="list-style-type: none"> <li>Coastal Garifuna village in Stann Creek district.</li> <li>Located 4 miles (6.4 km) east of the Southern Highway.</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>M</li> <li></li> </ul>
2. Sittee River	<ul style="list-style-type: none"> <li>Predominantly Creole community in Stann Creek District.</li> </ul>	<ul style="list-style-type: none"> <li>Potential</li> </ul>	<ul style="list-style-type: none"> <li>L</li> </ul>



Hopkins Assets	Description of Assets	Tourism Purpose	Tourism Readiness
	<ul style="list-style-type: none"> <li>Located 12 miles from Dangriga Town off the Southern Highway near Hopkins Village.</li> </ul>		
3. Maya Centre	<ul style="list-style-type: none"> <li>Maya Centre, at the junction of the Southern Hwy and the access road to Cockscomb Basin Wildlife Sanctuary, was established in the 1980s to relocate Mopan Maya villagers when the sanctuary was proclaimed.</li> <li>The Maya Centre provides medicinal trails.</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>M</li> </ul>
4. Serpon Sugar Mill	<ul style="list-style-type: none"> <li>Located in the jungle one mile in on the access road to the village of Sittee River.</li> <li>Serpon Sugar Mill is the country's first historical reserve.</li> <li>It is the remnants of the steam powered Serpon Sugar Mill which was established in 1865, marked the start of Belize's industrial era.</li> <li>Estimates are that at its peak, the Mill was producing and shipping 1,700 pounds of sugar a month.</li> <li>In the late 19th century, Serpon was a technological marvel with its main crusher, boiler, beam engine, furnace, and hot air exchanger – all powered by steam.</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>O</li> </ul>
5. Garifuna People	<ul style="list-style-type: none"> <li>The Garifuna people are Indigenous of mixed-race descendants of West African, Central African, Island Carib, European and Arawak people.</li> <li>Since 1797, the Garinagu people have inhabited Central America, along the coast of Honduras, Belize, Guatemala and Nicaragua.</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>O</li> </ul>

Hopkins Assets	Description of Assets	Tourism Purpose	Tourism Readiness
	<ul style="list-style-type: none"> <li>Arrived in these areas after being exiled from St. Vincent, an island in the Lesser Antilles.</li> </ul>		
6. Maya People	<ul style="list-style-type: none"> <li>Are an Indigenous people of Mesoamerica.</li> <li>They inhabit southern Mexico, Guatemala, Belize, El Salvador and Honduras.</li> <li>The Maya population of Belize is concentrated in the Corozal, Cayo, Toledo and Orange Walk districts.</li> <li>Maya populations who reside in Belize are divided into three groups inclusive of the Yucatec, Kekchi and Mopan.</li> <li>There is an estimated population of 8, 980 Maya people living in Belize.</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>M</li> </ul>
7. Garifuna Cuisine	<ul style="list-style-type: none"> <li>Garifuna meals mainly incorporate ground vegetables, plantains, seafood and coconut milk.</li> <li>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), hudutu (fish soup), or bundiga.</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>O</li> </ul>
8. Creole Cuisine	<ul style="list-style-type: none"> <li>The Creole is one of the main ethnic groups in Belize.</li> <li>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.</li> <li>Other types of Creole Cuisine are inclusive of Creole bread; fry jacks, and boil up.</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>O</li> </ul>
9. Maya Cuisine	<ul style="list-style-type: none"> <li>Meals incorporate ancestral traditional foods.</li> </ul>	<ul style="list-style-type: none"> <li>Potential</li> </ul>	<ul style="list-style-type: none"> <li>L</li> </ul>

Hopkins Assets	Description of Assets	Tourism Purpose	Tourism Readiness
	<ul style="list-style-type: none"> <li>• Corn, chocolate and guacamole heavily influence meals.</li> <li>• Corn is a staple dish that is used to create tortillas and tamalas.</li> <li>• Other types of Maya cuisine include caldo and pibil.</li> </ul>		
10. Dances	<ul style="list-style-type: none"> <li>• Several informal groups exist that performs traditional Garifuna dances.</li> <li>• One formal group is Lufuri Hopkins (Youth dance group)</li> </ul>	• Actual	• M
<b>Purpose Built Resources</b>			
1. Lebeha Drumming Centre	<ul style="list-style-type: none"> <li>• The Lebeha Drumming Centre was established in 2002 by Jabbar Lambey and Dorothy Pettersen, in Hopkins, Belize.</li> <li>• The centre exists with the goals of keeping Garifuna music alive, passing traditional music along to young people in the community, and sharing music with visitors to Hopkins.</li> <li>• The centre's focus is on traditional percussion music, though guitars have been donated and are also played.</li> </ul>	• Actual	• O
<b>Events</b>			
1. Annual Festivals	<ul style="list-style-type: none"> <li>• Hopkin's Day (End of July)</li> <li>• Mango Fest (June)</li> <li>• Garifuna Settlement Day (November)</li> <li>• Paranda Fest (March)</li> </ul>	• Actual	• O

Hopkins Assets	Description of Assets	Tourism Purpose	Tourism Readiness
	<ul style="list-style-type: none"> <li>Dugu Ceremony (Ad hoc)</li> </ul>		

## Appendix 4 – Meeting Participants

### Initial Stakeholder Meeting – May 29<sup>th</sup>, 2018

NAME	ORGANIZATION	POSITION	CONTACTS
Melissa Zuniga	BSCAP	General Manager	melissa@bscap.bz
Maricela Rodriguez	Tanias Guest House	Manager	533 7085
Eloda Nunez	Yugadah Inn	Manager	670 7089
Diamond Williams	See More Adventures	Manager	634 9495
Shereene Miranda	Sher's Tropical Flavas	Manager	662 4618
Ashford Miranda	D-Golden Tours	Manager	660 7879
Cheryl Rowland - Nunez	Sher's Tropical Flowers	Manager	662 4618
Barbara Kelt	Ize@Swc	Manager	651 8217
Sylvins Nunez	NGC Hopkins	Participant	661 6288
Hector Lambey			650 2318
Andrew Castillo	NGC Hopkins	President	653 0643
Mana Manez	Innies Rooms	Manager	661 0985
Clotildo Martinez	Innies Rooms	Manager	651 0815
Will Sanders	Hopkins Inn	Owner	601 9767
Leslie Sorrell	Hopkins Inn	Owner	631 8802
Miranda Susan	Sandy Beach	Secretary	663 3905
Ilwahme Martinez	Palmento Grove	Owner/Manager	661 6039
Katja Santale	Seemore Adventures	Marketing Manager	667 5779
Francis Zuniga Jr.	Hopkins Village Council	Vice Chairman	667 9310
Ella Carr	Ella's Cool Spot	Owner	630 9662
Merlene Castillo	Sandy Beach	Chair Person	650 9183
Analia Gayap	Villa Verano	Manager	670 9359

### **Hopkins Focus Group – July 5<sup>th</sup>, 2018 – Public Sector/Culture**

<b>NAME</b>	<b>ORGANIZATION</b>	<b>POSITION</b>	<b>CONTACTS</b>
Cheryl Nunez	BTIA Hopkins	Chairlady	616 0947
Shellone Martinez	Hopkins NGC	Member	662 0114
Jaclyn Nembhard	Belize Under Water	Dive Instructor	651 0545
Dalia Miranda	Blossoming Giftshop	Owner	665 6291
Whanie Martinez	Palmento Grove	Owner	661 6039
Sherina Zuniga	Garifuna Dance Group	Leader	650 4848
Mick Castillo	NGC	President	653 0643
Sylvins Nunez	NGC	Member	661 6288
Marlon Flores	Garimaya Gift Shop	Owner	650 5741

### **Hopkins Focus Group – July 5<sup>th</sup>, 2018 – Hoteliers – Restaurants/ Tour Operators - Guides**

<b>NAME</b>	<b>ORGANIZATION</b>	<b>POSITION</b>	<b>CONTACTS</b>
Francine Matute	Beaches and Dreams	Hospitality Manager	523 7259
Emily Fischer	Cosmopolitan Guest House	Owner	673 7373
Will Sanders & Leslie Sorrell	The Hopkins Inn	Owner	635 0411
Analia Gayap	Villa Verano	Manager	533 7016
Carl & Lauren Halcomb	White Horse Guest House	Owner	651 7961
Kirsty Roberts	Hamanasi	General Manager	533 7073
Jazmynn Tillett	Jungle Jeanies	Owner	533 7047
Martina Arana	Tina's Kitchen	Owner	650 3415
Troy Nunez	Happy Go Luckie Tours	Owner	651 0967

Noawell Nunez	Tour Operator		662 3017
Ashbert Reyes	Ash Adventures	Owner	663 0255
Elmer Avila	Tour Guide		667 6626

### **Hopkins Planning Session – August 9<sup>th</sup>, 2018**

<b>NAME</b>	<b>ORGANIZATION</b>	<b>POSITION</b>	<b>CONTACTS</b>
Cheryl Nunez	BTIA Hopkins	BTIA Chair	615 0947
Iwanhe martinez	Palmento Grove		
Mick Castillo	National Garifuna Council	President	653 0643
Francine Matute	Beaches and Dreams	Hospitality Manager	523 7259
Emily Fisher	Cosmopolitan Guest House	Owner	673 7373
Will Sanders & Leslie Sorrell	The Hopkins Inn		
Carl & Lauren Halcomb	White Horse Guest House	Owners	carlhalcomb777@gmail.com
Inspector Sanchez	Police Department	O.C.	615 7616
Troy Nunez	Happy Go Luckie Tours	Tour Guide	651 0967
Noawell Nunez		Tour Guide	662 3017
Francis Zuniga	Vice Chairman	Village Council	
Merlene Castillo	Sandy Beach	Chairlaidy	650 9183
Jazmyn Tillett	Jungle Jeanies	Manager	604 1081
Fernanda Tosta	Belize Tourism Board	DP Coordinator	625 8454
Yure Roberts	Belize Tourism Board	Destination Planning Manager	yure.roberts@belizetourismboard.org
Sean Tang	Belize Tourism Board	Business Development Manager	601 2392

### Hopkins Planning Session – August 10<sup>th</sup>, 2018

NAME	ORGANIZATION	POSITION	CONTACTS
Cheryl Nunez	BTIA Hopkins	BTIA Chair	615 0947
Shellone Martinez	Hopkins Health Clinic	Data Entry Clerk	662 0114
Iwanhe martinez	Palmento Grove		
Mick Castillo	National Garifuna Council	President	653 0643
Francine Matute	Beaches and Dreams	Hospitality Manager	523 7259
Emily Fisher	Cosmopolitan Guest House	Owner	673 7373
Will Sanders & Leslie Sorrell	The Hopkins Inn		
Stanley Barrow	Villa Verano	Guest Service	stanleybarrow23@gmail.com
Carl & Lauren Halcomb	White Horse Guest House	Owners	carlhalcomb777@gmail.com
Inspector Sanchez	Police Department	O.C.	615 7616
Troy Nunez	Happy Go Luckie Tours	Tour Guide	651 0967
Noawell Nunez		Tour Guide	662 3017
Ted Mckoy	Village Chairman	Village Council	667 9310
Francis Zuniga	Vice Chairman	Village Council	
Dr. Carolyn Valentine	The Love Clinic/Medical Doctor	Owner	670 0778



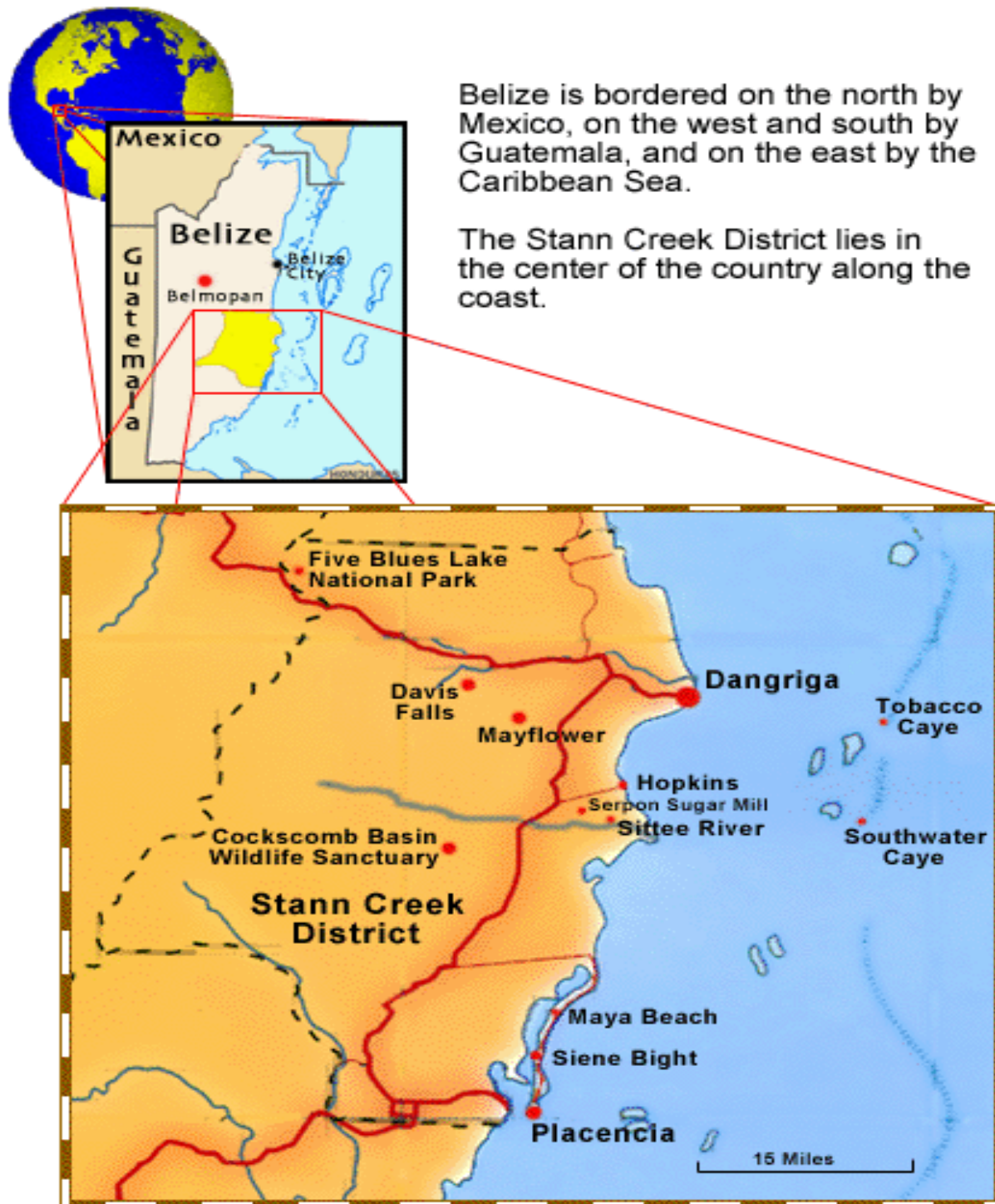
Fernanda Tosta	Belize Tourism Board	DP Coordinator	625 8454
Yure Roberts	Belize Tourism Board	Destination Planning Manager	yure.roberts@belizetourismboard.org
Sean Tang	Belize Tourism Board	Business Development Manager	601 2392

### Hopkins Validation Session – November 12<sup>th</sup>, 2018

NAME	ORGANIZATION	CONTACTS
Emily Peggy Fisher	Cosmopolitan Guest House / Owner	673 7373/ <a href="mailto:info@cosmopolitanbelize.com">info@cosmopolitanbelize.com</a>
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## Appendix 5 – Map of Southeast Coast Destination



## Appendix 6 – Quarterly Status Report Form

### TDDP QUARTERLY STATUS REPORT PERIOD/YEAR

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

#### REPORTING SUMMARY

##### Overall Status:

	Green (Controlled)	Yellow (Caution)	Red (Critical)	Reason for Deviation
<b>Budget</b>	<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"/>	
<b>Schedule</b>	<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"/>	
<b>Scope</b>	<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:

## KEY MILESTONES

	<b>Milestone</b>	<b>Plan Completion Date</b>	<b>Status<sup>29</sup></b>	<b>Actual Completion Date</b>
1.				
2.				
3.				
4.				
5.				

## ACTIVITIES AND PROGRESS

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

<sup>29</sup> 1) Not Yet Started 2) Delayed 3) On-going 4) Completed

## 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	•	•	•	•

## RISKS, ISSUES, AND CHALLENGES

<b>Risk type</b>	<b>Risk Description</b>	<b>P<sup>30</sup>: 1 – 5 (1=low 5=high)</b>	<b>S<sup>31</sup>: 1 – 5 (1=low 5=high)</b>	<b>Risk Score (P+S)</b>	<b>Detail of action to be taken (mitigation / reduction / transfer / acceptance)</b>
Political	•	•	•	•	•
Economic	•	•	•	•	•
Social	•	•	•	•	•
Technological	•	•	•	•	•
Environmental	•	•	•	•	•
Legal	•	•	•	•	•

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<sup>30</sup> Likelihood Of Risk Occurring

<sup>31</sup> Severity of Risk

## NEXT STEPS

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



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