



## Orange Walk Tourism Destination Development Plan

Orange Walk Tourism Destination Development Plan

Praxis Advisory Group Ltd.  
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## Acronyms

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ADS	Average Daily Spending
ARR	Average Room Rates
ATLIB	Association of Tertiary Level Institutions of Belize
BAA	Belize Airport Authority
BBA	Belizean Bus Association
BBRS	Belize Barrier Reef System
BHA	Belize Hotel Association
BMA	Belize Management Agency
BPA	Belize Port Authority
BSI-ASR	Belize Sugar Industries
BTB	Belize Tourism Board
BTIA	Belize Tourism Industry Association
BELTRAIDE	The Belize Trade and Investment Development Service
CARSI	Central American Regional Security Initiative
CPM	Competitive Profile Matrix
CTO	Caribbean Tourism Organization
DCA	Department of Civil Aviation
DOE	Department of Environment
EIA	Environmental Impact Assessment
FSTV	Fort Point Tourism Village
FGD	Focus Group Discussion
GDP	Gross Domestic Product
GOB	Government of Belize
GST	Government Sales Tax

GSTC	Global Sustainable Tourism Council
IA	Institute of Archaeology
ITVET	Institute Technical and Vocational Education Training
LOS	Length of Stay
LTC	Local Tourism Council
MCC	Monitoring and Coordination Committee
MDP	Municipal Development Plan
MJC	Muffles Junior College
M&E	Monitoring and Evaluation
MTCA	Ministry of Tourism and Civil Aviation
MOE	Ministry of Education
MOT	Ministry of Tourism
MWT	Ministry of Works and Transportation
NEMO	National Emergency Management Organization
NGO	Non-Government Organization
NHR	Northern Health Region
NICH	National Institute of Culture and Heritage
NSTMP	National Sustainable Tourism Master
ORT	Objective Responsibilities and Targets
OW	Orange Walk
OWTC	Orange Walk Town Council
OWTGA	Orange Walk Tour Guide Association
PA	Protected Areas
PESTEL	Political, Economic, Socio-Cultural, Technological, Ecological, and Legal
p5	praxi5 Advisory Group Ltd.
POS	Point of Sale

SCOT	Strengths, Challenges, Opportunities and Threats
SIB	Statistical Institute of Belize
TBD	To be determined
TDDP	Tourism Destination Development Plan
TOR	Terms of Reference
UNWTO	United Nations World Tourism Organization
USA	United States of America
WHS	World Heritage Site
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 Orange Walk District accounts for a small percentage of Belize's total tourism activities. The district has the lowest hotel and room stock and one of the lowest average room occupancy rates in the country. It also ranks behind several other destinations in the country in other key tourism indicators. This situation exists, according to stakeholders, because there is insufficient development of Orange Walk's tourism products.

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

***With a unique and authentic natural, living multi-cultural heritage tourism product, Orange Walk aims to offer its valued visitors an unforgettable experience delivered by friendly, skilled people committed to responsible tourism practices that maximize local participation and benefits.***

To realize this destination vision, the Orange Walk Destination must first adequately engage in tourism development. This will be done by focusing on three strategic thrusts/goals, which are:

- ***THRUST 1:*** *Orange Walk will develop diversified tourism products that cater to the overnight and cruise sectors to showcase the natural and cultural experiences that are most representative of what is unique to this destination.*
- ***THRUST 2:*** *Orange Walk will develop and implement a comprehensive branding and marketing plan to position and increase demand for the OW tourism product.*
- ***THRUST 3:*** *Orange Walk will ensure a properly trained tourism workforce to ensure the delivery of quality and unforgettable visitor experiences.*

The top strategic objectives for the destination are listed below:

1. Increase and diversify tourism products.
2. Support the development of micro and small tourism enterprises.
3. Enhance critical infrastructure that supports tourism.
4. Advocate for responsible use and management of natural and cultural attractions and sites.
5. Ensure quality, health & safety standards in place to support the Orange Walk Destination.
6. Develop a brand for the Orange Walk destination.
7. Conduct destination marketing and promotion.
8. Provide accessible and affordable training opportunities in the destination.
9. Maintain and enhance partnerships with primary national and local tourism stakeholders.

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

#### **1. 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 Orange Walk.

Three significant aspects describing tourism in Belize include:

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

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

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

## **2. The TDDP:**

This section of the report is the essence of the TDDP. It describes the vision statement for the Orange Walk 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 Orange Walk.

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, timeframe by year/quarters, and responsible parties. This timetable provides guidance to the responsible parties for the development of annual work plans and budgets.

## **3. Appendices:**

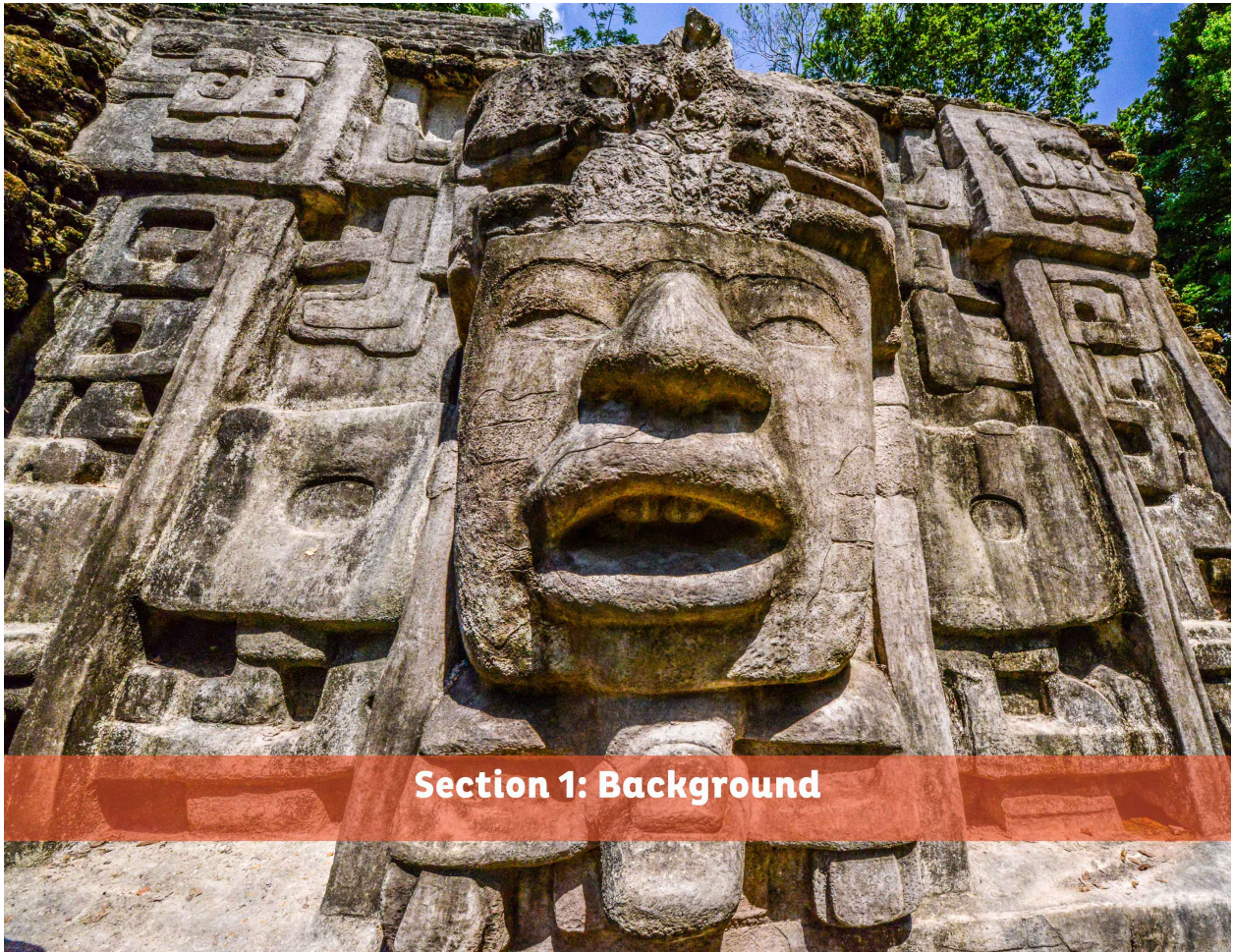
Supporting documents are included as Appendices. These documents provide additional information related to the main sections of the TDDP. Appendix 1 describes the planning process used to define the main structure of TDDP and the method followed to prepare the plan.

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

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## SECTION 1: BACKGROUND

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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

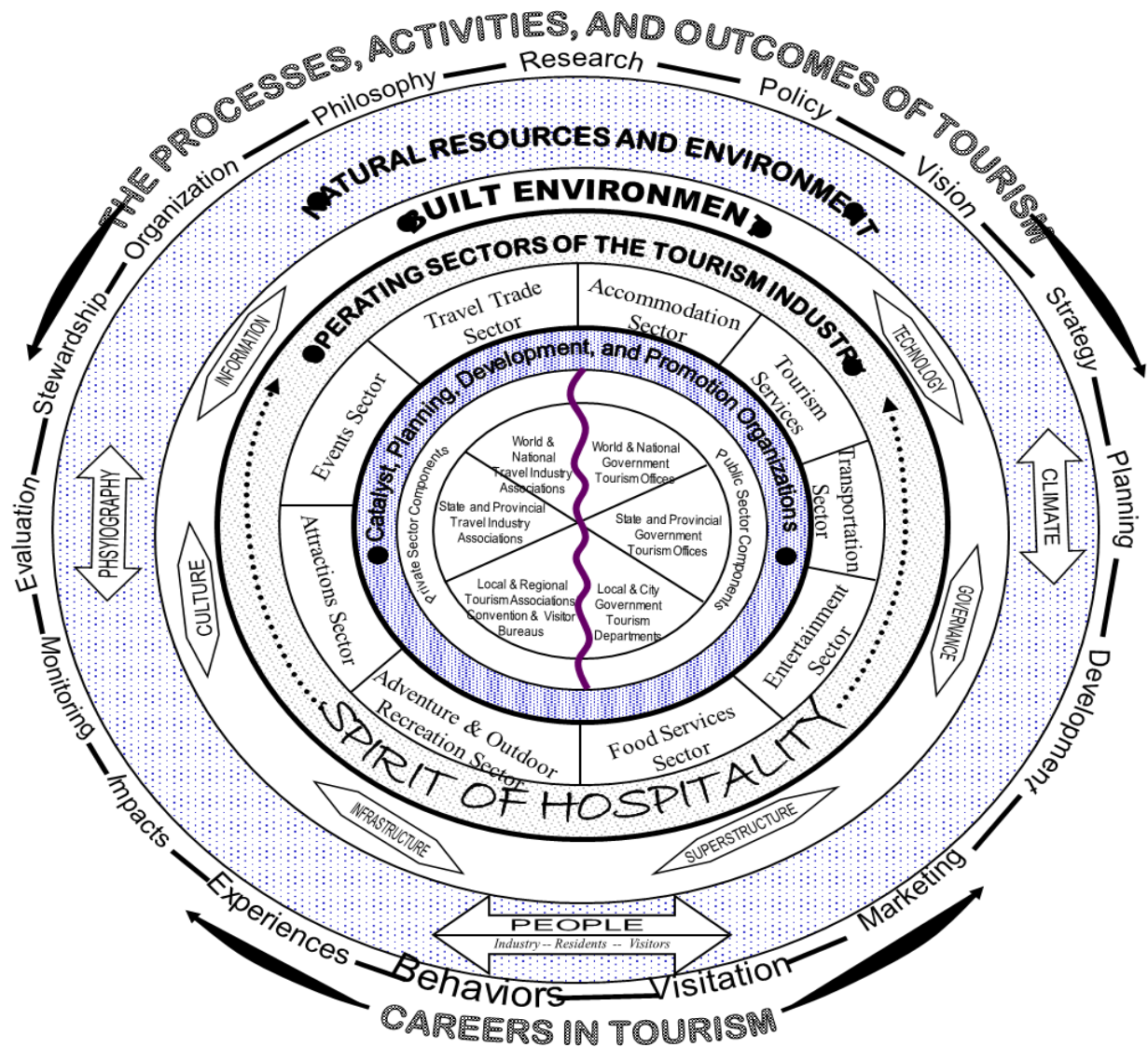
Belize’s current macroeconomic activity is driven primarily by traditional exports such as sugar, bananas, and citrus. Most recently, Belize had some success exporting petroleum (a non-renewable resource), however, is a non-renewable resource, the supply is now dwindling. A thriving sector of the economy 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 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. It can be argued that Belize’s tourism is centered on its natural resources and environment. It can be argued that Belize’s tourism niche is its natural resources and environment. The National Sustainable Tourism Master Plan (NSTMP) is a strategic development plan mostly for the “built environment” that is inclusive of the Governance, the Infrastructure, and the Superstructure, as well as the industries classified under hospitality. 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 model, 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 consists of the following major categories of assets:

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

<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, the central component of Belize's tourism product is its natural environment. According to the Belize Tourism Board's (BTB) Visitor's Satisfaction survey in 2016, the main activities that visitors undertook while visiting Belize were marine activities. Approximately 70% of visitors reported that they "snorkelled" and 21% reported that they went "diving". Other activities that most reported engaging in were fishing, kayaking, and sailing. The survey reported that 27% participated in "jungle and rainforest expeditions". The survey also tracked the places where visitors claimed to have visited, and overwhelmingly, these were the marine areas of the country. Some 42% reported going to offshore islands, and 55% visited the Barrier Reef while 43% reported visiting marine protected areas. 38% visited Archaeological sites, and 36% visited National Parks<sup>2</sup>. These figures provide evidence that the main tourism activities that visitors engage in when visiting Belize are marine activities and the rainforest and jungle, all part of the natural environment with the exception of the archaeological sites (part of the built environment). It is this natural environment, this tourism product that gives Belize a competitive advantage in tourism.

### **1.2 The Macro-environmental profile of Belize Tourism**

Belize is a small nation-state with a land mass of almost 9,000 square miles and a population approaching 400,000 persons. As mentioned earlier, the main economic activity is comprised of 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.

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<sup>2</sup> Travel and Tourism Digest 2016, BTB

**TABLE 1: BELIZE GDP GROWTH (IN MILLIONS OF DOLLARS) <sup>3</sup>**

2013	2014	2015	2016	2017
<b>2613.9</b>	<b>2719.7</b>	<b>2822.9</b>	<b>2809.2</b>	<b>2,844.1</b>

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 wider economic impact, it will account for 45% of GDP (Figure 2). This is a constant increase over the years. In 2017, the GDP direct contribution to the economy was 15% (BZ\$555m) with a wider contribution of 41.3% (BZ\$1.5b) Figure 3. The trend reflects the observation that travel and tourism continuously are driving the Belizean economy. The concept of direct contribution and total contribution is an important one. One tends to look at travel and tourism activities as only those activities in the hospitality industry, e.g. hotels, restaurants, tours, etc. But one also needs to understand that travel and tourism has an impact on so many other industries, i.e. transportation, construction, agriculture among others; many of these outputs are directly correlated to tourism activities. It is for this reason that the World Travel and Tourism Council accounts for a wider contribution of tourism to an economy (Figure 4) (2018 Belize Economic Impact Report, WTTC)<sup>4</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”. It is evident from Figure 4 that travel and tourism has a significant correlation with other economic activities.

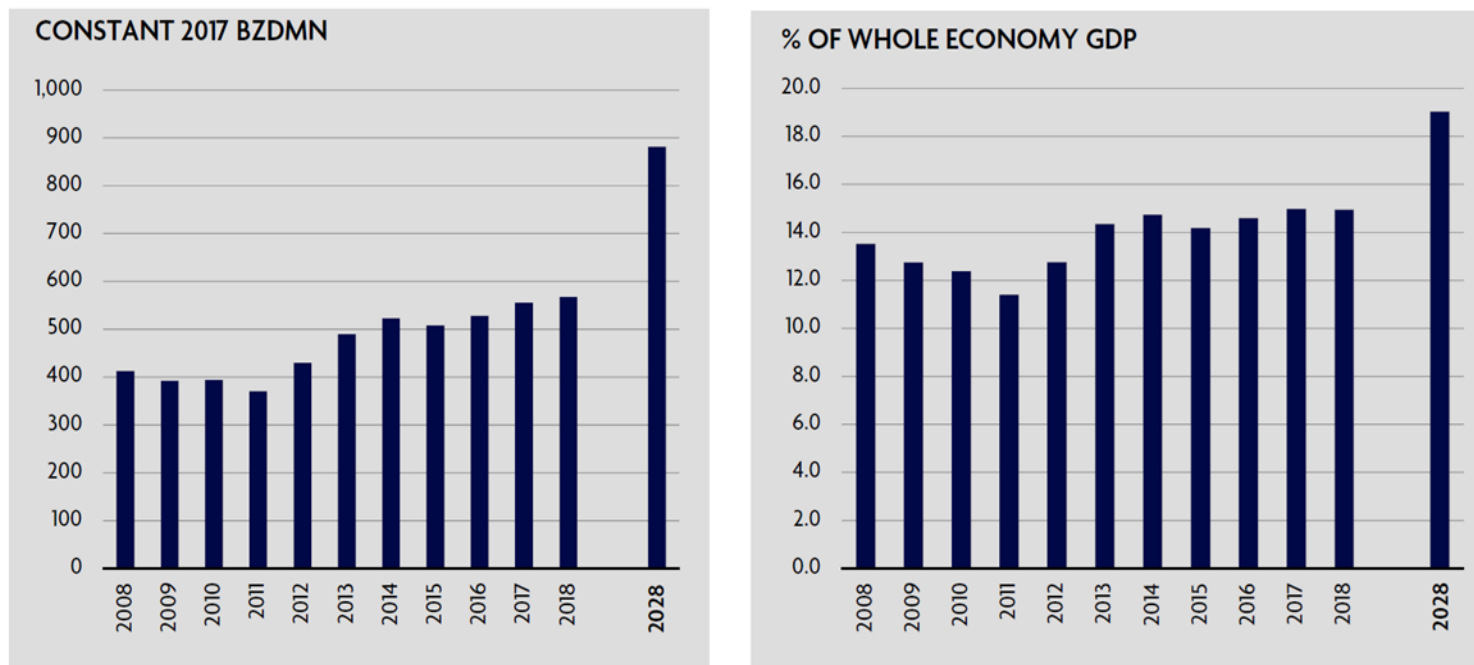
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<sup>3</sup> Source: Statistical Institute of Belize, March 2018.

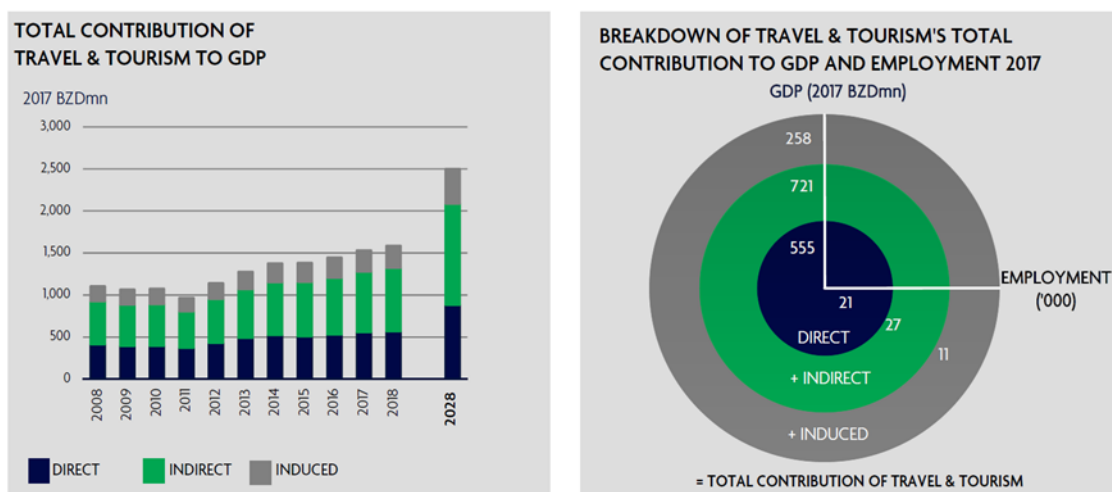
<sup>4</sup> 2018 Belize Economic Impact Report, World Travel and Tourism Council

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

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

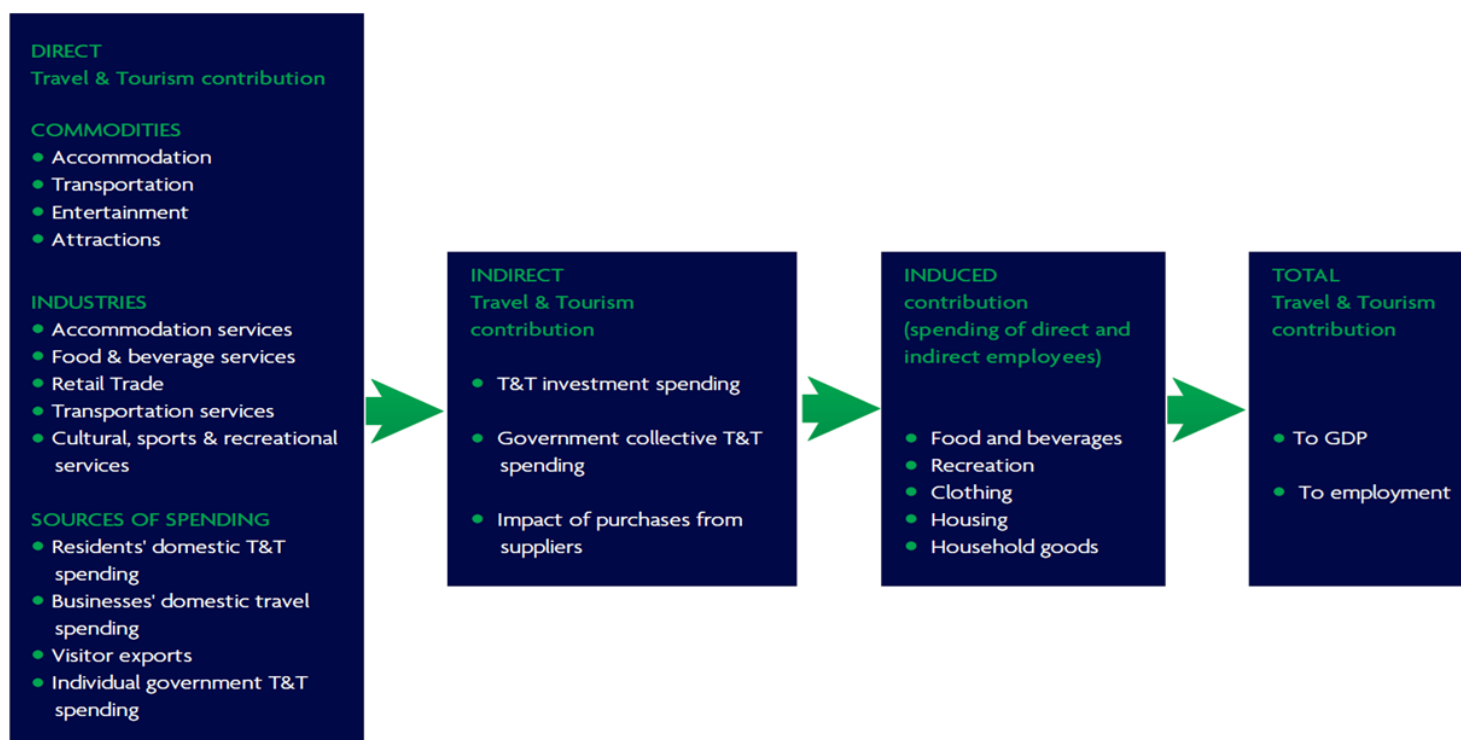


**FIGURE 3: TOURISM CONTRIBUTION TO BELIZE'S GDP<sup>5</sup>**



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

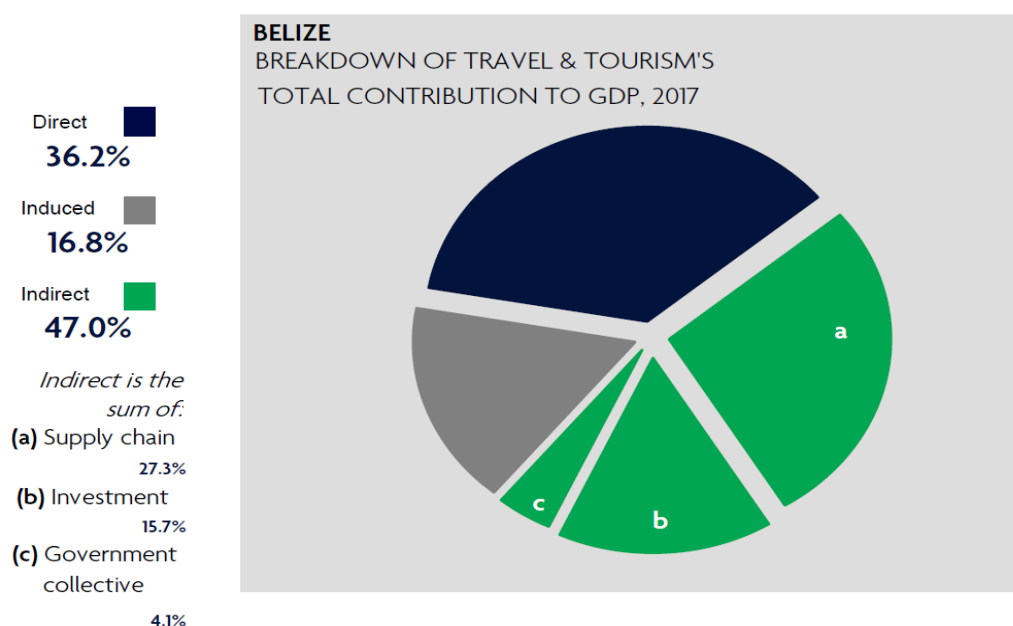
**FIGURE 4: THE CONTRIBUTION OF TOURISM TO AN ECONOMY<sup>6</sup>**



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 a clear 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. If one was to go by visitor arrivals, Belize is still in its infancy stage as it relates to tourism activities.

But observers have seen an upward trend in growth. 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 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

<sup>7</sup> Belize Tourism Board Release, April 11, 2018

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)**

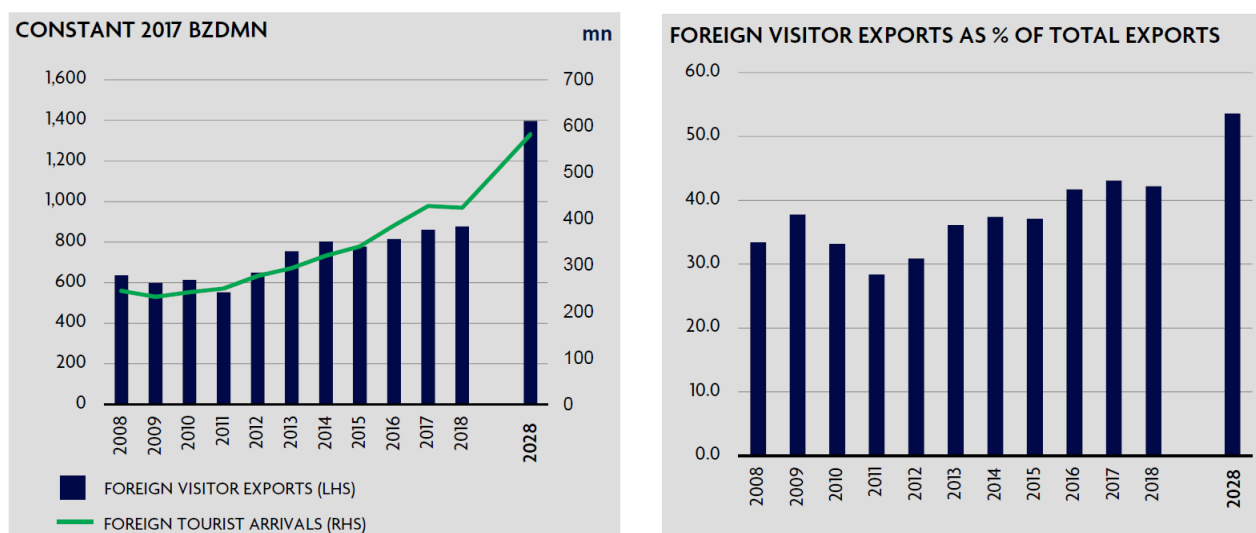
Type	2013	2014	2015	2016	2017
Overnight	294177	321220	341161	385583	427076
Cruise	677,350	968,131	957,975	1,005,394	1,014,231

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 leading 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 show that overnight visitors account for approximately 85% of this expenditure and 15% allocated to cruise passengers.

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

2013	2014	2015	2016	2017
749.8	768.9	770.9	819.6	794.9

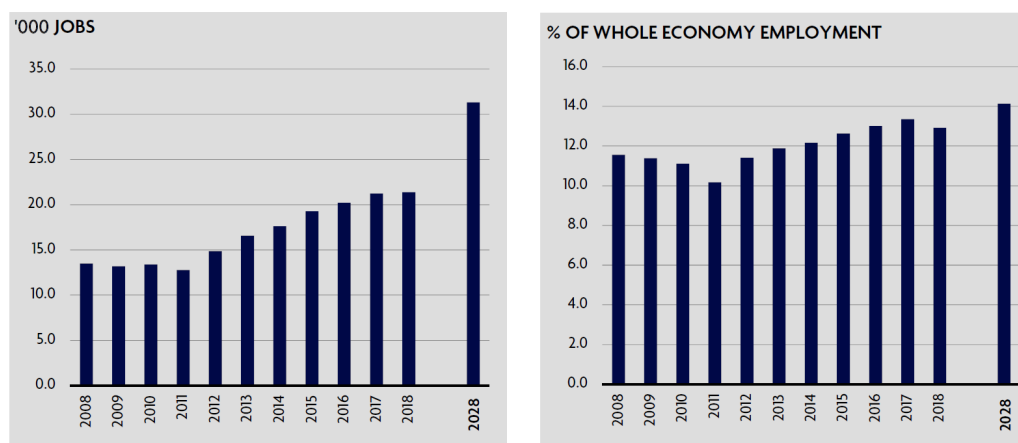
**FIGURE 6: TOURISM EXPENDITURES AS A PERCENTAGE OF TOTAL EXPORTS****BELIZE:VISITOR EXPORTS AND INTERNATIONAL TOURIST ARRIVALS**

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

The total number of persons employed directly in tourism in 2015 was approximately 18,500 and aggregately was 34.8% of total employment or 48,500, a figure representing some 1 in 7 persons. In 2017, direct employment was 20,186, and total aggregate employment was 59,000 jobs or 37.3% of total employment. This employment figure is expected to rise to some 90,000 jobs by 2028 (2018 Belize Economic Impact Report, WTTC) (Figure 7). Without a doubt, these data indicate the importance of tourism to Belize's economy. Although Belize has other 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.

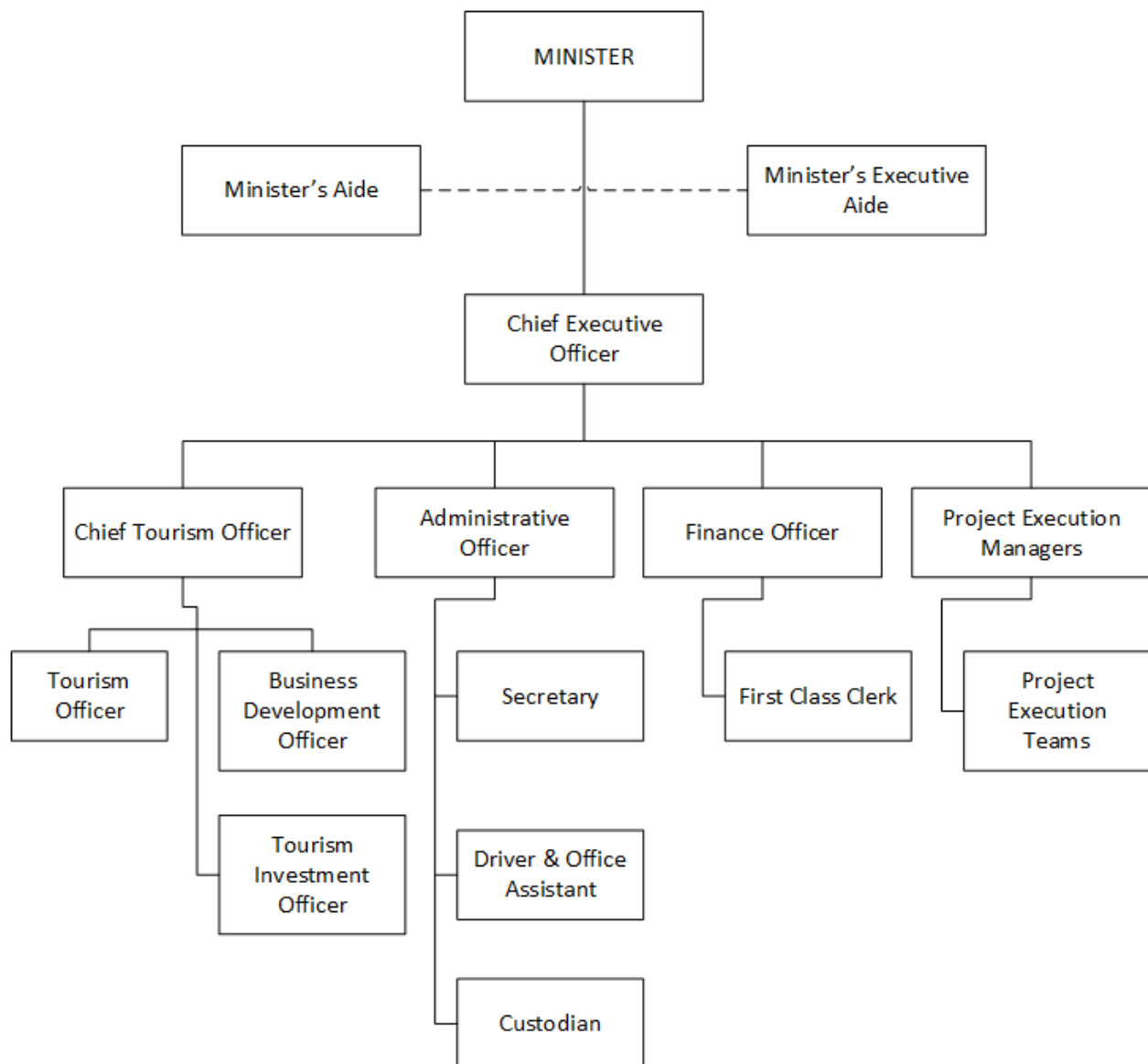
The BAA is responsible for the management, maintenance and administration of certified and prescribed airport facilities and aerodromes in the country.

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 Orange Walk**

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

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

Similarly, village councils have responsibility for the maintenance of streets, drains and the sanitation of the village, and the maintenance of public parks, markets and cemeteries. They are tasked with encouraging and assisting cooperation on economic and social development and general welfare. They run community centres and assist residents in making representations to the government if there are problems with certain centrally administered services like school supplies, primary healthcare or the provision of agricultural extension services. They must also ensure that sound environmental practices are adhered to by all persons within the village<sup>8</sup>.

The Orange Walk destination has twenty-four villages and one town. Like all other villages in the country, its village councils are comprised of seven persons with an executive including a Chairperson, Vice Chairperson, Secretary, and Treasurer. Other members are councillors. The village councils are volunteer groups. For the most part, Orange Walk village councils are not involved in tourism-related initiatives. This may be a result of the destination’s emergence status within the tourism industry.

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

In addition to the village and town councils, there is a local chapter of the BTIA. Many tourism projects and activities are implemented or supported by the BTIA in collaboration with local community stakeholders. The BTIA also acts as a lobbying body

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<sup>8</sup> Belize Country Profile 2017–18

and promotes tourism activities and entrepreneurship not only among its members but also to the general public

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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. Local and national election cycles usually have been free and fair, and free from violence. There has always been a peaceful transition of power from one administration to the next. A stable political environment creates a favorable environment for private sector activity.

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, Orange Walk Town is governed by a Town Council which is in charge of overseeing the implementation of a Municipal Development Plan (MDP) for the municipality. The MDP is a long-term planning strategy to assist the Town Council in carrying out its municipal management responsibilities, respond to population and

economic change, manage urban expansion, and provide the services required to ensure social, economic, functional and environmental cohesion and a good quality of life for residents of the community. The Town Council (OWTC) is made up of a Mayor and six councillors. Unlike the national political system where the voters cannot elect the Prime Minister directly, electors of the municipality can directly vote for their preferred Mayoral candidate. The town is elected along party lines but does not rely on central governments for subventions as much as village councils. The town councils generate some of its revenue via property taxes, vehicle licensing and registration, and liquor and trade licence fees. Regarding the local political environment, the local political scene in Orange Walk Town 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.

Orange Walk (part of Northern Belize) 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 identified Cruise Tourism as the primary tourism product themes for Orange Walk. Nature-based Tourism and Cultural Tourism was identified as a secondary tourism product theme. Tourism stakeholders do not necessarily agree that cruise tourism is the primary tourism product for the destination, although Lamanai (a major stop for cruise passenger tours) remains the primary attraction in the destination. Local stakeholders referred to the diverse natural and cultural assets of the destination, including the north-western forests (e.g., Rio Bravo Conservation and Management Area and Gallon Jug) and the Maya-Mestizo culture and its associated traditional practices, celebrations, music, food and dances. These natural and cultural products are what local tourism stakeholders prefer the destination to be identified with.

The Mexican market has major potential for northern Belize, especially now that the entry requirements into Belize for Mexicans has been greatly facilitated. Mexicans can now visit Belize in either of three ways: 1) with a passport, 2) a border card issued by Belize Immigration Department, or 3) a permit stamped and signed by the Belize Consulate in Chetumal, Quintana Roo. To obtain a permit, Mexicans need to bring a copy of their identification card to the Consulate to receive a stamp and signature. With that, Mexican Immigration Office gives a three-day permit to exit Mexico.

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 – have a major influence as it relates to the improvement and strengthening of tourism policies and practices.

## 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 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 Belizean's travelling to destinations such as Orange Walk will be very limited. Orange Walk has the second lowest average room rate at US\$157. Only Corozal, also in northern Belize, is lower at US\$108. These room rates may be more within the budget of the average Belizean<sup>9</sup>, even more so if rates are lowered, or special rates are offered for Belizean nationals, so there may be good potential to expand into the local tourism market.

Unemployment is high in Orange Walk, a situation that is compounded by the challenges faced in the sugar industry. While a workforce is available, these are for the most part low-skilled labourers for which there are not sufficient employment opportunities. Persons with the proper skills and attitude are in short supply.

The weakness of the Mexican peso results in a massive influx of Belizeans into Quintana Roo and Yucatan for various reasons but primarily for tourism and recreation, business

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<sup>9</sup> By comparison, Ambergris has the highest average room rate at US\$403, and Placencia second highest at US\$355.

and medical purposes. As a result, millions of dollars get syphoned out of the Belizean economy. Opening up to Mexico (i.e., facilitating the entry of Mexican visitors into Belize) will have an immediate positive effect on the tourism industry in northern Belize, and by extension on Belize's economy.

The challenges in the sugar sector will have a negative impact on the economy of northern Belize. This will result in reduced local investment and little disposable income for local tourism. Agriculture (i.e., sugarcane, grains, and vegetables) is the most important economic sector in northern Belize. The potential exists to link agriculture with tourism (i.e., agri-tourism potential).

### SOCIO-CULTURAL FACTORS

A main socio-cultural factor that has directly affected tourism is the increase in crime in the country. While crime in the Orange Walk District is not at the scale of Belize City, this trend can rapidly change for the worse. The effectiveness of the recent policing methods in Belize City has resulted in criminal elements moving to other parts of the country to ply their illicit trades. If the rate of homicides and other violent crimes increases, as well as the incidences of drug plane landings, it is possible that visitors in the future will cancel their vacation to Belize due to high criminal activity (although current evidence does not support this premise).

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.

#### 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.

Nevertheless, the changes in population demographics can have an impact on the cultural tourism product. Observations from stakeholders at the Focus Group sessions indicate that there is an ever-increasing presence of Central American immigrants, which is resulting in a slight cultural shift in the Orange Walk area. It is not uncommon to find an ever-increasing emergence of Salvadoran “popusas” stands and Chinese restaurants in central areas of Orange Walk Town. Interestingly, both Central American and Chinese immigrants in the food service business have started to offer traditional Belizean fare on their menus. The growing, Belizean-owned restaurants also provide a range of international meals. These trends have not resulted in significant shifts in culinary offerings since Maya Mestizo-inspired fare can be found quite easily across the district.

Access to primary education exists and is affordable. It is a national law that every child attends elementary school, and thus the state must make it accessible and affordable. Orange Walk residents have access to primary level education in Orange Walk Town and all the villages. High School and Junior College (first two years of college) is not a mandatory state requirement but, if sought, residents of Orange Walk District have a choice of five high schools and one junior college, plus two other junior colleges within a 30-mile radius. 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. If a resident of Orange Walk 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 Northern Health Region (NHR) serves the two northern districts with a total estimated population of 77,964. The NHR is composed of two public Health Institutions (Northern Regional Hospital and Corozal Community Hospital), eleven Health Centers and sixteen Health Posts. The Northern Regional Hospital (NRH) is located in Orange Walk Town and has 57 beds. The NRH provides primary and secondary level care to the Northern Health Region of Belize (Orange Walk & Corozal Districts) such as the following hospital services: General Surgery, Paediatrics, Internal Medicine, Orthopaedics, Neurology, Obstetrics/High Risk, and Gynaecology, as well as Radiology and other Support Services. The NRH is relatively well suited to accommodate an emerging tourism population center, such as Orange Walk.

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

Similarly, cultural expression activities – such as music festivals, culinary events, and cultural trails – are vital parts of the cultural tourism product. Much of these elements are already in existence in the Orange Walk District and require only packaging and pricing to be marketed to visitors.

## TECHNOLOGICAL FACTORS

Technology is an essential factor in any industry, and the tourism industry is no exception. The assessment of technology for the destination takes the form of identifying how technology impacts the marketing and delivery of the product. As with all destinations, technological impact on the Orange Walk 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. The rise of the online marketplace and hospitality services that connects people looking to rent their homes with people who are looking for accommodation, e.g., Airbnb, is also quickly becoming the norm. The impact of technology on tourism in the Orange Walk area is not occurring at the same pace as it is countrywide. However, it is expected that very soon Orange Walk will have access to the national telecommunication company's high-speed internet services, Diginet, which provides fiber optic internet speeds for businesses of up to 130mps download speeds. This improvement will positively impact the delivery of the tourism product.

## ENVIRONMENTAL FACTORS

Significant threats to tourism in Belize include hurricanes, tropical storms, and floods. It is essential 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 significant economic justification for conservation. This fact is explicitly recognized in the overarching development strategy, Horizons 2030., which is operationalized in the Growth and Sustainable Development Strategy for Belize and National Sustainable Tourism Master Plan.

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

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

GOB's announcement that the use of single-use plastic and Styrofoam will be banned by April 2019 puts Belize on the map and will be a significant boost to our tourism marketing strategies and the intended branding image of Belize as a responsible tourism destination.

Orange Walk has still not been integrated into the national solid waste management program. While a waste transfer station is not in place, the Government of Belize recently announced that one would soon be constructed. In the meantime, the local Town Council collects solid waste on a regular basis and deposits this in an open dumpsite outside of town limits on property owned by BSI-ASR. The town lacks a proper sewage system – the town still heavily relies on septic systems which are woefully inadequate for a destination that is located along a major waterway, the slowly flowing New River.

## 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.

There is the consensus from the stakeholders in Orange Walk that there are enough laws and regulations in place. While laws in Belize are generally well written, the challenge lies in their effective, consistent and fair enforcement. For example, the business community has complained repeatedly that a level playing field does not exist, e.g., as it relates to charging and paying GST. Also, it is a known fact that most restaurants do not have a POS

system or programmable cash registers, which may result in underpayment of tax revenues to the GOB.

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

#### **BOX 2: LAWS RELATED TO TOURISM**

Laws related to Tourism:

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

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

#### OTHER MAJOR ISSUES IDENTIFIED

- The destination ranks in the lower echelons of most national tourism indicators: 28.2% occupancy rate (3<sup>rd</sup> lowest), the lowest number of hotels and lowest hotel room stock, and 19,010 overnight visitors (3<sup>rd</sup> lowest).<sup>10</sup>
- 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. The risk, therefore, exists for foreign investors with access to outside funding to gradually control the tourism industry.
- Low levels of disposable income among residents and high poverty rates result in low levels of domestic visitors to the destination, except during events such as festivals and carnival.
- Improper industrial and residential waste disposal creates pollution and associated problems in the New River, which connects Hill Bank/Lamanai with Corozal Bay.
- A weak Mexican peso contributes to driving thousands of Belizean visitors to Mexico on a weekly basis thus affecting domestic tourism in Belize.
- Increasing fuel prices are driving up the cost of living and cost of doing business.
- Natural events (such as tropical storms and hurricanes) can damage or severely set back the main tourism products via wind damage, floods, destruction of the road network and electrical grid.

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<sup>10</sup> 2017 Tourism Indicators (BTB)

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### **3. The Orange Walk District Tourism Market**

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#### **3.1 Orange Walk Tourism Trends**

As described above, Belize's tourism is in an upward growth trend. The most popular tourist destinations in the country are Ambergris Caye, Placencia, Cayo District, and Belize City (for cruise passengers). Assessing the data, the Orange Walk District accounts for a small percentage of Belize's total tourism activities. The overnight sector is vital for the Belize tourism product given the expenditure from this sector is more and has a more significant economic impact. A key indicator for this sector is the accommodation industry. The Orange Walk District has the lowest hotel and room stock in the country. In 2013, Belize had a total hotel supply of 757 hotels with a room stock of 7,377. In 2017, the supply of hotels increased to 856 with a total room stock of 8,177. In 2013, the Orange Walk District had only 20 hotels with 258 rooms. In 2017, the hotel and room stock in Orange Walk increase minimally to 22 and 287 respectively (Table 4 and Table 5). In today's accommodation environment, one has to consider the sharing economy, and one of the most popular is Airbnb. In November 2018, Airbnb displayed some 52 listings in Orange Walk. If it is assumed that each one is one bedroom, that is 52 more rooms in the stock. One must note, however, that many listings on Airbnb are also registered hotels, so the possibility of a double count is strong.

**TABLE 4 : TOTAL TOURISM EXPENDITURES IN BELIZE (IN BZ\$M) (BTB)**

Destination	2013	2014	2015	2016	2017
Belize	757	805	850	861	856
Orange Walk	20	23	23	21	22

**TABLE 5: TOTAL NUMBER OF ROOMS IN BELIZE AND ORANGE WALK (BTB)**

Destination	2013	2014	2015	2016	2017
Belize	7377	7364	7619	8212	8177
Orange Walk	258	289	291	264	287

A measurement of hotel performance is occupancy rates. The District represents the smallest percentage of Belize's hotel and room stock, and its occupancy rates are lower than the national average. Belize's average occupancy rate in 2016 was 37% and in 2017 was 39%. By comparison, Orange Walk had an average occupancy rate of 29% in 2016 and 28.2% in 2017. However, the district did not have the lowest occupancy rate in 2017; that would be the Toledo District (15.6%) and the Corozal District (22.3%) (Table 6).

**TABLE 6: BELIZE AND ORANGE WALK HOTEL OCCUPANCY RATES  
(BTB)**

<b>Destination</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>
Belize (country)	42.8	37	39
<b>Orange Walk</b>	<b>32.2</b>	<b>29</b>	<b>28.2</b>
Corozal	36.5	29.9	22.3
Toledo	30.4	18.7	15.6

Orange Walk also has one of the lowest Average Room Rates (ARR); in 2016, ARR for Orange Walk was \$135.75. However, ARR increased in 2017 to \$156.34, the only region in the country to see an increase in room rates.<sup>11</sup>

The SIB tracks the data by polling a sample of visitors to assess their spending. As one might imagine, it is quite difficult to track domestic tourism as there is no point of entry *per se* (like exists at an international port of entries); but total visitation numbers are captured using survey methodologies. The SIB reports that in 2016, total visitation and the Average Daily Spending (ADS) for Orange Walk was 16,203 persons with an ADS of \$US90.51 with US nationals spending the most (US\$106.79). In 2017, visitation increase to 19,010 and the ADS for Orange Walk increased to US\$103.76 with US visitors spending US\$141.81. As a point of comparison, the ADS in Ambergris Caye in 2017 was US\$173.85. A possible reason for the increase in the daily ADS in Orange Walk is (as noted above) the increase in room costs amongst other inflationary pressures. As cruise is an important industry in Belize, it is essential to assess its contribution. In Orange Walk, Lamanai is the main attraction for cruise visitors. In 2016, some 63,500 persons visited Lamanai. One can safely assume that most of these visitors were cruise passengers. The average expenditure of cruise passengers is US\$60<sup>12</sup> per day.

Additionally, a measurement of tourism performance is the number of persons employed in the sector. As it relates to direct tourism employment, in 2016, of the total employed nationally, Orange Walk District employed just 3% of the total. In 2017, there was no change in the percentage. Most of these persons employed in Orange Walk were in Food and Beverage Services (Table 7).

<sup>11</sup> Source: The Statistical Institute of Belize (SIB), which collects data on specific domestic destination visits and tourism expenditures in those destinations.

<sup>12</sup> A division of total cruise visitors of 1 million compared to total expenditure of US\$60 million

**TABLE 7: BELIZE AND ORANGE WALK HOTEL OCCUPANCY RATES (BTB)**

	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>
Belize (country)				19,391	20,186
Orange Walk				647	654
• Food and Beverage				<b>338</b>	<b>341</b>
• Accommodation				<b>168</b>	<b>176</b>

An examination of tourism training in the Orange Walk district reveals that there are no formal training programs. Every other district has some 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 some regions of the country. However, there is no such offering at the ITVET in the Orange Walk district. Other Junior Colleges such as the Junior Colleges in Corozal and Stann Creek also offer tourism training, but the Junior Colleges in the Orange Walk District do not (Table 8). It is believed that in 2018, the Muffles Junior College will start an Associate's degree in tourism studies.

**TABLE 8: INSTITUTIONAL TOURISM TRAINING IN BELIZE 2018**

<b>Institution</b>	<b>Graduates</b>	<b>Current Enrollment</b>	<b>Internship</b>
<b>ITVET</b>		<b>155</b>	
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>	

A rapid TripAdvisor analysis of three popular hotels in Orange Walk was conducted to understand visitor insights of these properties. Hotels included in the sample were: Hill Bank Field Station, Chan Chich Lodge, and La Milpa Field Station. Overall, the majority of visitors ranked their experiences very highly. All of these accommodations had an 80% overall rating on TripAdvisor, which is the highest score achievable. Furthermore, 10 visitor reviews were analyzed to gain further insights into visitor satisfaction. Visitors appreciated how the accommodations allowed them to be immersed in Belize's natural environment while providing them with authentic experiences.

An analysis of the two most popular hotels in Orange Walk Town points to high TripAdvisor satisfaction levels of well. Hotel de la Fuente and St. Christopher's were ranked highly with overall ratings of 93% and 84% respectively. Majority of the comments addressed positive visitor experience for Orange Walk Town and the hotel's amenities. This quick assessment validates that Orange Walk has the requisite attractions and some quality accommodations to satisfy visitors.

### **3.2 Orange Walk Tour Operators**

Tour operators play an essential role in the packaging, distribution and sales of tourism products. They function as intermediaries between suppliers and consumers. Tour operators are therefore important strategic partners for tourism development. As of 2017, there were thirteen (13) BTB registered tour operators from Orange Walk. These operators offer mainly terrestrial tour products. In a review of the tour operators' websites and other web pages, it was observed that nine (9) operators provide tour offers only in Orange Walk. The main attraction of the tours is the Lamanai Archaeological Site. The packages commonly include a river tour along the route to the Lamanai site. Some other stand-alone tours conducted include birding and sport-fishing along the New River.

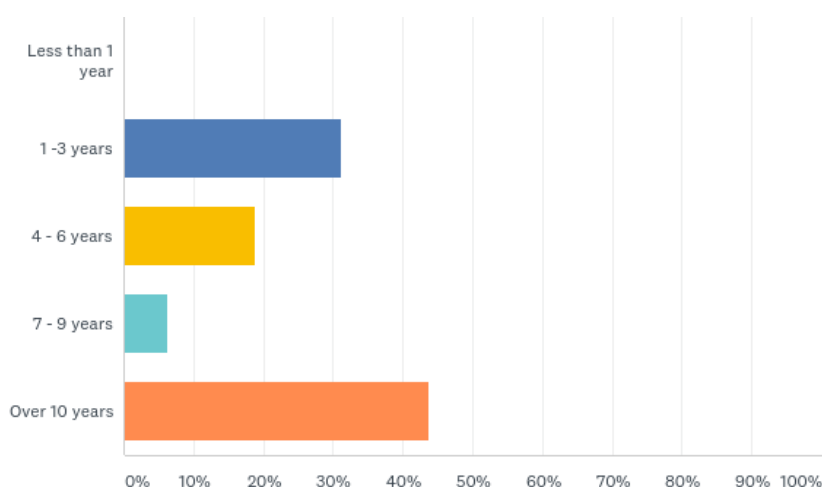
The four (4) other tour operators, while registered in Orange Walk, conduct tours mainly outside the district. While archaeological tours are their top tour offer, other offers include cave tubing, river kayaking, and ziplining.

Associations are becoming a critical part of the tourism landscape in Belize. In many industries (accommodation, food and beverage, guiding) within this sector, active associations are visible. However, there are not many tour operator associations in Belize. Although Orange Walk has a few registered tour operators in Belize, there is no tour operator association in the district.

### 3.3 Orange Walk Tour Guides

An online survey of licensed tour guides who are residents from the Orange Walk Destination was conducted to ascertain necessary information on their status and characteristics<sup>13</sup>. This survey was done using convenience sampling where tour guide contact information was obtained from the BTB's database of which only those registered guides with email addresses were sent the online survey. Of the 123 licensed Orange Walk tour guides, responses were received from 16 (13% response rate)<sup>14</sup>. Below are the results of the survey.

FIGURE 9: REGISTERED TOUR GUIDES



When asked how long they have been a registered tour guide, forty-four percent (44%) of respondents stated over 10 years, thirty-one percent (31%) said between 1 and 3 years, nineteen percent (19%) said between 4 and 6 years, while six percent (6%) said between 7 and 9 years. Of these respondents, fifty-six percent (56%) indicated

that they work as full-time tour guides while forty-four percent (44%) work as part-time guides. For those respondents who indicated that they worked as part-time guides, the majority (43%) worked two weeks per month, while the others worked one week per month (28.5%) and three weeks per month (28.5%) respectively.

When asked if they conducted most of their guiding in the Orange Walk District, **sixty-two (62%) of respondents said no**. Of the respondents that said no, more than half (57%) are conducting guides in the Belize District and an equal percentage (14.3%) are conducting guides in San Pedro Town, Cayo District, and multiple country destinations. The high percentage of Orange Walk tour guides conducting guiding outside the destination may be an indication of the unavailability of work given the low demand.

In classifying their guiding expertise, sixty-three percent (63%) of respondents indicated that they are Culture/Heritage/Archaeological guides. Eighteen (18%) said they were

<sup>13</sup> Anecdotal information showed that most Orange Walk tour guides guided outside of the district. As a result, the survey was conducted to obtain more informed data about the situation of the guides from the area.

<sup>14</sup> While the response rate for online surveys is 30%, some research indicate that 10-20% response rate is reasonable.

Marine guides, while nine percent (9%) said they were Nature Guides, and another nine percent (9%) said they have expertise in multiple areas.

**FIGURE 10: TOUR GUIDE SKILL SET**

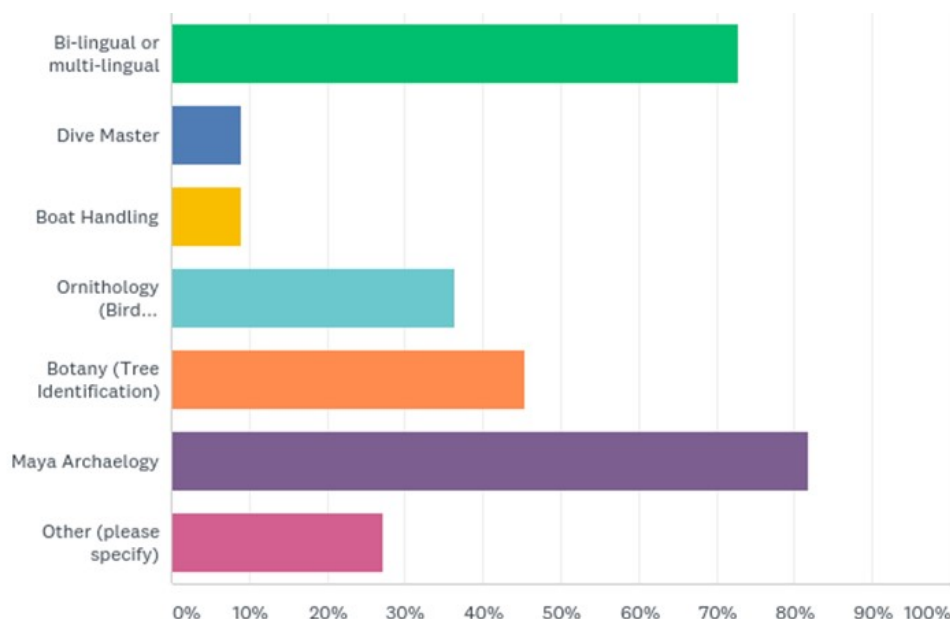


Figure 10 shows the tourism skill set that respondents claim. The majority (82%) indicated having skills in Maya Archaeology followed by being bilingual. Other significant skills included Botany and Ornithology. As it relates to language, all of the respondents indicated their

ability to conduct guiding in English while eighty-one percent (81%) said they could also conduct guiding in Spanish.

Respondents were asked to rank the customer types that represent their highest number of customers. The top-ranked customer type was cruise ship visitors at sixty-three percent (64%) followed by overnight visitors at thirty-six percent (36%). Finally, respondents indicated that most (64%) of the guiding that is done is through tour operators while the remaining guiding work, thirty-six percent (36%) 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, stakeholders informed that in freelancing, tour guides might 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.

As mentioned above, associations have become important and serve as important tourism lobby organisations. In this landscape, tour guide associations are more prevalent. One can find at least one of these associations in every district. Tour guide associations serve an essential function as it is a requirement for a tour guide license that an individual applying for such a license secure a recommendation from a tour guide association in good standing.

In Orange Walk, the tour guide association is called the Orange Walk Tour Guide Association (OWTGA). This body is very active and is operated by an executive team that includes a President, Vice President, Secretary, and Treasurer. The association has been vocal in its lobbying efforts and recently has voiced concerned about oil drilling in the Orange Walk district. The association also is very active in the community and provides many community service including partnering with schools to enhance guiding as a career option.

### **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, Caye Caulker, and the Cayo District. Emerging destinations are Toledo, Corozal, and Orange Walk – each positioning a unique brand of tourism. The main tourism assets in the coastal areas [such as Ambergris Caye and Placencia] are marine, and the main assets for the terrestrial destinations [Orange Walk and Cayo] are the subtropical forests, archaeological sites, and caves. These individual destinations may find themselves competing for visitor attention and dollars under the country's national brand. However, as opposed to defining the relationship as pure competition, it is best to look at it as a system of cooperation in which destinations can offer differentiated and complementary experience thereby distributing visitors and expenditures.

Using the Competitive Profile Matrix (CPM)<sup>15</sup> to assess where Orange Walk is in comparison to its major competitors as defined by the consultative process, Orange Walk was compared to Corozal and Cayo. Corozal was selected because of its proximity and Cayo because of its natural and cultural tourism products. Chetumal (Quintana Roo, Mexico) was also included in the analysis due to its proximity to northern Belize.

Based on managerial judgement, the consultants decided on 12 critical success factors that are important to the destinations' operations for tourism destination management (Table 9).

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<sup>15</sup> Adapted from the Competitive Profile Matrix, Strategic Management-Concepts and Cases, David, Fred; David, Forest, 16<sup>th</sup> 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.

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

Among the three Belizean destinations assessed (Table 10), Cayo is the destination that has the highest competitive position with a score of 2.81; it is one of the most developed

tourist destinations in the country, certainly more so than Orange Walk and Corozal, with a very strong brand. Because of its proximity to Xunantunich, Caracol, the Macal River, and attractions in the Maya Mountains (e.g., at the Mountain Pine Ridge), Cayo scored high for its natural and cultural tourism assets, the quality of its ancillary services and its brand strength. The latter is likely due to the strength of its marketing strategies, in which it scored high as well.

Orange Walk as a destination has weak brand strength in part due to insufficient and unsustained marketing efforts and limited availability of developed tourism products. However, the destination scored as high as Cayo for its natural and cultural tourism assets. It also scored well in health care access, quality of ancillary services and access to

**TABLE 9: 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 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.

tourism assets. Orange Walk shows a stronger competitive position than Corozal in most of the areas that were scored. The asset listing (Appendix 2) shows the vast amount of natural and cultural assets located within the district.

Including “Chetumal and surroundings” (Quintana Roo, Mexico) in the analysis indicates that this Mexican destination is Orange Walk’s (and the northern region’s) most important competitor (Table 10). Chetumal and surroundings scored higher than Orange Walk, Corozal and Cayo in all the critical success factors, except in the “natural and cultural tourism assets” category where it scored lower than the Orange Walk and Cayo destinations. It is therefore unsurprising that large numbers of Belizeans pour into the Chetumal area on a daily basis for various tourism purposes, including shopping, leisure and entertainment. TDDP strategies will need to focus on improving Orange Walk’s competitive edge compared to “Chetumal and surroundings”. One way to do this is to aim to attract domestic tourists to visit northern Belize and, specifically, Orange Walk. Another way is to have direct airline flights from major hubs within Mexico to Belize. A recent announcement that AeroMexico will soon start flying from Mexico City to Belize is a step in the right direction to increase the arrivals of Mexican visitors and other international tourists into Belize and the northern districts. Another approach to consider, as recognized in the NSTMP, is to group Orange Walk and Corozal as an integrated northern Belize destination by taking advantage of the specific strengths and tourism assets of each area.

The TDDP for Corozal District envisions that Corozal will become a vibrant, family-friendly, nature-based, cultural destination with diverse tourism experiences and attractions developed inclusively and sustainably. The plan recognizes that Corozal is the gateway to Corozal Bay and many ecological, heritage and adventure opportunities that the Bay area offers. By grouping Orange Walk and Corozal into one larger tourism destination through branding, marketing and packaging, the northern Belize area can significantly improve its competitive standing next to “Chetumal and surroundings”, particularly related to the natural and cultural tourism assets that northern Belize offers. Chetumal will continue to maintain its superiority/edge in the areas of shopping, leisure and entertainment for the near future.

In regards to issues associated with sustainable tourism development, marketing strategies, and destination management, there is a need for considerable improvement. Given the CPM position, these are areas where strategies will be developed to improve the district’s competitive position within Belize.

**TABLE 10: CPM CRITICAL SUCCESS FACTORS COMPETITIVE**

<b>Critical Success Factors</b>	<b>Weight</b>	<u><b>Orange Walk</b></u>		<u><b>Corozal</b></u>		<u><b>Cayo</b></u>		<u><b>Chetumal &amp; surrounds</b></u>	
		<b>Rating</b>	<b>Score</b>	<b>Rating</b>	<b>Score</b>	<b>Rating</b>	<b>Score</b>	<b>Rating</b>	<b>Score</b>
<b>Natural and Cultural Tourism Assets</b>	0.15	4	0.60	3	0.45	4	0.6	3	0.45
<b>System for Monitoring Tourism Activities</b>	0.15	1	0.15	1	0.15	1	0.15	3	0.45
<b>Marketing Strategies</b>	0.08	1	0.08	1	0.08	4	0.32	4	0.32
<b>Zoning Laws and Regulations</b>	0.05	1	0.05	1	0.05	2	0.10	4	0.20
<b>Safety and Security Systems</b>	0.10	2	0.20	2	0.20	2	0.20	3	0.30
<b>Health Care Access</b>	0.10	3	0.30	2	0.20	3	0.30	4	0.40
<b>System to Monitor Visitor Satisfaction</b>	0.05	1	0.05	1	0.05	2	0.10	2	0.10
<b>Access to Tourism Assets</b>	0.08	3	0.24	3	0.24	3	0.24	4	0.32
<b>Quality of Ancillary Services</b>	0.08	3	0.24	3	0.24	4	0.32	4	0.32
<b>Has Tourism Management Group</b>	0.05	1	0.05	3	0.15	3	0.15	4	0.20
<b>Brand Strength</b>	0.06	1	0.06	1	0.06	3	0.18	4	0.24
<b>Sustainability considered in its actions</b>	0.05	2	0.10	3	0.15	3	0.15	2	0.10
<b>Totals</b>	<b>1.00</b>		<b>2.12</b>		<b>2.02</b>		<b>2.81</b>		<b>3.40</b>

### **3.5 Profile of the Orange Walk Tourism Product**

The National Sustainable Tourism Master Plan identified the Orange Walk District as “the destination [will be] hosting diversified cultural heritage, living traditions and nature-based eco-tourism products with high involvement of local rural communities. The plan recommended that Orange Walk cater-+ to a well-managed cruise visitors market while establishing a growing overnight sector.” Orange Walk (within the Northern Belize Destination) 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”.

The NSTMP identified two main themes for tourism product development: 1) Cruise Tourism, and 2) Nature-based Tourism and Cultural Tourism, which the NSTMP regards as secondary tourism products. The NSTMP describes these products as follows:

- Regarding Cruise Tourism, Northern Belize should offer those day visitors standard quality tourism assets and products. A further suggested cruise tourist destination, besides Lamanai, could be Cuello – an archaeological site which is currently underdeveloped. The program suggests the development of infrastructures at dedicated cruise tourism destinations, sites, attractions and activities to cater for large tourism crowds especially in Lamanai and Altun Ha.
- Northern Belize offers great potential for cultural tourism, living culture and cultural heritage. Living culture would offer traditional life and expressions as a part of a tourism content development strategy for Northern Belize: e.g. Mestizo Culinary Festival, traditional markets, music festivals, “A day in the life of a Maya”, etc.”
- In addition to living culture, there are a few Maya sites, e.g. Chan Chich and La Milpa, which have not been further excavated and would require rehabilitation and further development to be promoted. A mid-class quality of cultural tourism experiences in Northern Belize is recommended. These sites would appeal primarily to overnight visitors since their location are not considered feasible for day tours.
- Also, cultural tourism in Northern Belize has the opportunity to be extended to agricultural/rural tourism involving Mennonite communities, such as Blue Creek, Spanish Lookout (Cayo District), Shipyard and Little Belize. Major industries are the sugar sector (sugar cane fields, sugar processing factories) and the rum industry amongst others.

- Cultural Tourism in Northern Belize is planned to include rural tourism at Mennonite and Mestizo communities and man-made facilities showcasing local productions such as sugar cane and rum.
- In Northern Belize, Nature-based Tourism should be offered to a mid-high quality scale and could include eco-tourism activities in the areas of Rio Bravo, Gallon Jug and the New River corridor to Northern Belize as prime tourism destinations.

The stakeholder consultations for the development of this Tourism Destination Development Plan pointed to marked differences between the national plan's proposed vision for tourism product development and stakeholder opinions about primary and secondary tourism products. There was a consensus among stakeholders that the expansion of products for cruise tourism might not bring about widespread economic benefits. This viewpoint is mainly informed by the many issues surrounding tours in and around Lamanai that are catering mainly to the cruise sector. Stakeholders were therefore much keener to develop products for the stay-over sector. This report presents balanced recommendations to meet the needs of both cruise and stay-over tourists.

### **3.6 Orange Walk Tourism Assets**

Appendix 2 provides an inventory of the major Orange Walk Tourism Assets. The assets are presented based on their categorization fit. There are four main tourism asset categories; these 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 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.

For each asset identified, a description is provided, and there is an indication of the purpose of the asset that denotes whether that asset is an actual or a potential attraction. Finally, an assessment<sup>16</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.

<sup>16</sup> Assessment was done based on professional judgement, existing knowledge about the asset, and stakeholder discussion.

- *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 11 shows the results of the Orange Walk tourism assets assessment. Overall, there are thirty-eight (38) identified tourism assets<sup>17</sup> in the destination. Of these, eighteen (18) are actual assets while twenty (20) are potential assets. The table also shows the breakdown of assets by category and their tourism readiness.

**TABLE 11: ORANGE WALK TOURISM ASSETS ASSESSMENT**

Asset Category	# Of Assets	Optimal Readiness	Moderate Readiness	Limited Readiness	Inadequate Readiness	Actual	Potential
Natural	21	4	2	13	2	9	12
Cultural & Heritage	10	2	6	2	0	6	4
Purpose Built	6	0	3	3	0	2	4
Events	1	0	1	0	0	1	0
<b>TOTAL</b>	<b>38</b>	<b>14</b>	<b>9</b>	<b>4</b>	<b>1</b>	<b>18</b>	<b>20</b>

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

Figure 11 shows the results of the problem tree analysis. The most critical problem that the destination is experiencing is that there is insufficient development of Orange Walk's tourism products. This problem exists because of three main issues 1) lack of leadership to develop a tourism strategy; 2) the destination not being sufficiently included in the national tourism plan, and 3) the view that tourism is not a priority for the destination.

The existence of the destination problem has contributed to further issues. First, there is limited demand for the destination products as visitors are unaware of the tourism assets and attractions of the destination. Orange Walk is an emerging destination with nascent tourism with highly fluctuating seasonality.

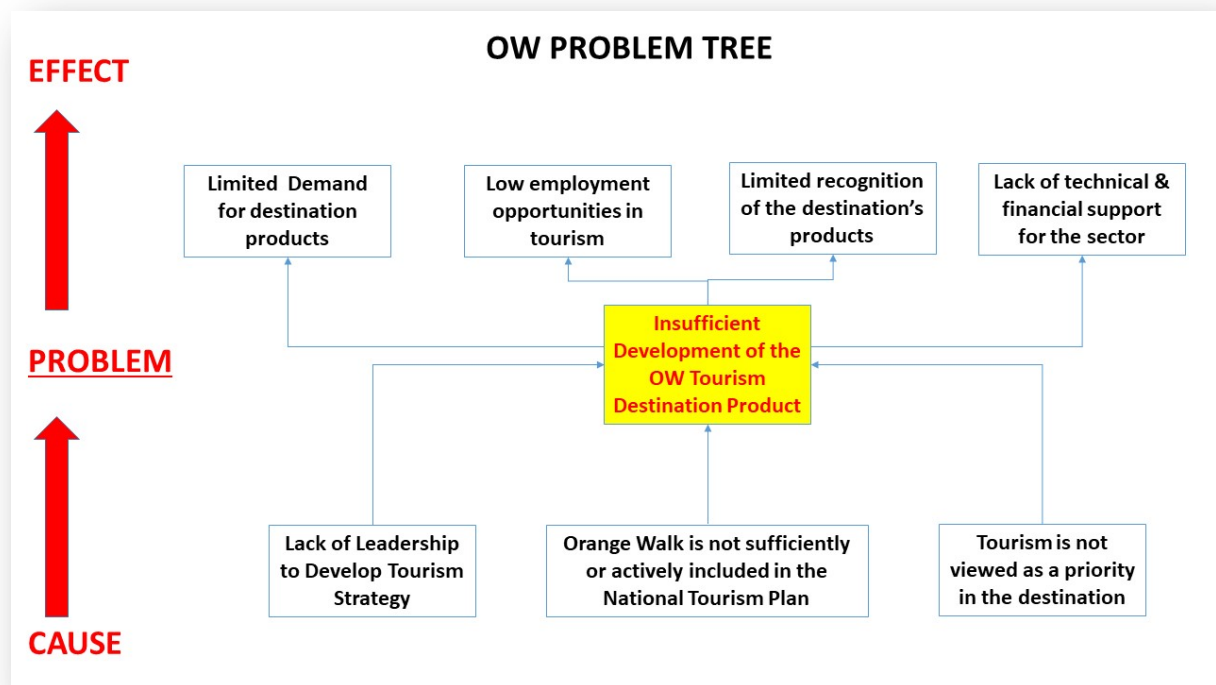
<sup>17</sup> Only assets with some level of tourism potential have been initially identified.

Second, a low demand which impacts on whether products are developed and also affects the availability of employment opportunities, therefore, tourism employment in the destination is likewise low. The destination does not have a developed and diversified tourism product.

The third issue as a consequence of the main problem is that there is limited recognition of the destination's products. Again, visitors will not know of the products if they are not adequately developed, marketed, and promoted. The "Sugar City" brand has not been marketed sufficiently to create awareness of other products of the destination beyond sugar and rums. Tourism stakeholders do not invest much in marketing their properties and the destination.

Finally, there is inadequate financial and technical support for developing tourism at the destination. These issues are all interrelated and have a profound impact on tourism development in Orange Walk. The destination has a mostly unskilled workforce in need of specialized training. However, relevant capacity development initiatives are in short supply.

**FIGURE 11: ORANGE WALK PROBLEM TREE**



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

### 3.8 Bottlenecks Hindering Competitiveness

Table 12 presents some bottlenecks or obstacles hindering the competitiveness of Orange Walk. These bottlenecks are divided into the main aspects of product development, distribution and marketing and those that could relate to capacity building measures.

**TABLE 12: BOTTLENECKS HINDERING ORANGE WALK'S COMPETITIVENESS**

<b>BOTTLENECK/OBSTACLE</b>
<b><i>Product distribution and marketing</i></b>
<b>Outbound Operators.</b> The foreign tour operators do not cover Orange Walk in their offerings (other than Lamanai) and appear to lack any interest in it. This suggests a significant lack of awareness problem in the travel marketplace.
<b>Ground Operators.</b> Orange Walk's attractions mainly are not on the radar screens even of Belizean Tour operators who function more as <i>excursion operators</i> occupied elsewhere in the country and making little effort to develop comprehensive tour products featuring places in Orange Walk District (other than Lamanai).
<b>Marketing and Promotion.</b> A parallel obstacle is an absence online of appealing packages featuring stops in Orange Walk that foreign visitors can research and purchase with ease. Poor (or poorly designed) marketing efforts result in misinformation provided to tourists and other visitors. Two high-end resorts, Chan Chich and Lamanai Outpost, and to a lesser extent Rio Bravo Ecolodge, conduct independent marketing of their properties and tours.
<b>Facility of Entry.</b> A departure fee of US\$18.75 is a deterrent for both leisure and business travel of Mexicans and is applied even to those coming from Chetumal. This tax is particularly burdensome for families to pay.
<b><i>Infrastructure</i></b>
<b>Waterfront.</b> Orange Walk Town's riverfront lacks proper access and facilities and is confronting erosion and point-pollution marring the environment and reducing its appeal as a welcoming urban amenity with a strong sense of place. No riverfront infrastructure is in place, other than the Banquitas area which is controlled by a businessperson under a lease arrangement with NICH. Proper boat docking and pedestrian access infrastructure and facilities are needed.
<b>Archaeological Sites.</b> Orange Walk Town lacks rehabilitated monuments symbolizing its past that could be used in promotion and image building. Cuello Site has been mentioned (by business people) to serve this purpose but needs to major infrastructural improvements. Likewise, colonial monuments such as Fort Mundy and Fort Cairnes need major infrastructural rehabilitation works.
<b>Interpretation at Attractions &amp; Sites:</b> Cuello Site has no interpretation to enrich visits, and is not open to the public. The site lacks all the basic facilities.
<b>Roads:</b> The road link from San Felipe to Indian Church/Lamanai is in very bad condition, which makes the road access to Lamanai difficult.
<b><i>Product development and quality assurance</i></b>
<b>Cultural Experiences.</b> Hotel owners have remarked that their guests are requesting information about other tours and excursions, particularly in the area of culture. Such tour options and alternatives to Lamanai are in very short supply.

<b>BOTTLENECK/OBSTACLE</b>
<b><i>Product distribution and marketing</i></b>
<p><b>New River.</b> The New River is under-utilized for tourism primarily because of lack of interest to invest in leisure and entertainment ventures, such as riverboat dining.</p> <p>Stops with proper toilets, appealing restaurants are needed at points along the New River such as San Estevan, Guinea Grass, and Shipyard to make all-day excursions feasible.</p>
<p><b>Community-based Tourism.</b> Residents and businesspersons in villages of cultural potential along the proposed Holpatin Trail (Yo Creek, San Antonio, San Lazaro, August Pine Ridge, San Felipe) do not know how to promote community types of tourism like homestays, cultural tourism, and agro-tourism.</p>
<p><b>Quality assurance.</b> The quality of the lodging offer and service quality in many establishments are inadequate for all segments.</p> <p>The quality of restaurants and hotels/accommodations within the destination need to be improved for international visitors.</p>
<p><b>Cleanliness.</b> Poor enforcement of littering laws and low level of civic pride.</p>
<p>Inadequate communication and collaboration among tourism stakeholders.</p>

### 3.9 Strengths and Opportunities

Boxes 3 and 4 below summarize the strengths and opportunities related to tourism development in the Orange Walk District. 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 following major “internal strengths characterize the Orange Walk Tourism Destination”:

Assets & Amenities:

- Location of one of the most popular Maya archaeological sites found here – Lamanai; will continue to be a major draw.
- Major natural protected areas are located in the district, such as the Rio Bravo Conservation & Management Area and Honey Camp National Park.
- Two of Belize’s three major rum companies are based in Orange Walk, hence the reason why the destination has hosted several Rum Festivals.
- The area is rich in Maya Mestizo culture, which is expressed in the form of culinary specialties, stories, song and music, and sports (such as the recently revived Poktapok Maya ball game).
- The hotels and restaurants are predominantly locally owned, and the major sites and attractions are very accessible.

Safety and Quality Assurance:

- The destination is more affordable than most of the other destinations in Belize, e.g., Orange Walk has the second lowest hotel room rate (on average) in Belize.

- A low crime rate compared to Belize City. Residents feel safe and secure at home and outdoor events. As a result, people from other parts of the country tend to visit to take part in celebrations and other events, such as the September Carnival which is now a well-recognized event which draws Belizeans to Orange Walk.
- The skill-level of residents of Orange Walk is relatively high; most residents are bilingual (English and Spanish), and a few also speak the Yucatec Maya language.

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

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

Product Development:

- All the elements for the development of a “Tour Orange Walk” package exist urban trails, cultural and agricultural activities, nature, and the New River.
- The elements of a unique Agro-Tourism product and other responsible tourism products exist that should be developed and marketed.

Market Linkages:

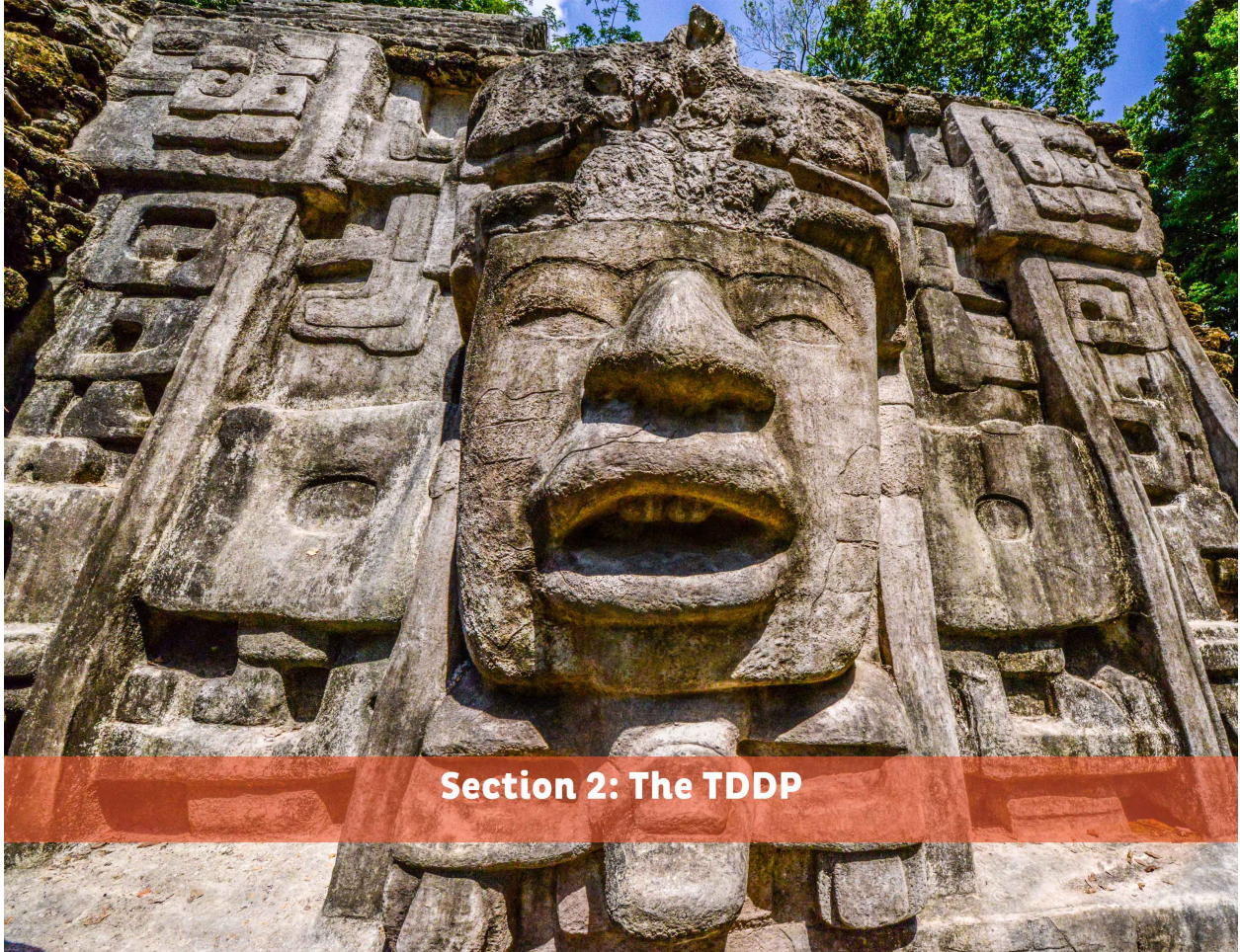
- Opening up to the vast Mexican Market by facilitating (via complementary treatment) the entry of Mexican visitors into Belize.

Reach out to the San Pedro (Ambergris) and Caye Caulker markets that are now connected to Orange Walk via direct and daily local flights.

- The use of various social media platforms to market the Orange Walk brand.
- Orange Walk and Corozal can be marketed and promoted as an integrated northern destination, as per the NSTMP.

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## SECTION 2: THE TDDP



### Section 2: The TDDP

## 4. Vision for Orange Walk Tourism Industry

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The vision statement for Destination Orange Walk expresses the aspirations for a unique and authentic, living multi-cultural heritage product. These aspirations were derived through a multi-step process. The first steps involved understanding the current situation. The results of the Orange Walk destination diagnosis, PESTEL analysis, and SCOT analysis provide a comprehensive snapshot of the current state of tourism in Orange Walk. 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

***With a unique and authentic natural, living multi-cultural heritage tourism product, Orange Walk aims to offer its valued visitors an unforgettable experience delivered by friendly, skilled people committed to responsible tourism practices that maximize local participation and benefits.***

### 4.2 Purpose Statements (Goals)

To realize the destination vision, the Orange Walk Destination must first adequately develop its tourism products. This will be done by focusing on three strategic thrusts/goals that are:

- ***THRUST 1:*** Orange Walk will develop diversified tourism products that cater to the overnight and cruise sectors to showcase the natural and cultural experiences that are most representative of what is unique to this destination.
- ***THRUST 2:*** Orange Walk will develop and implement a comprehensive branding and marketing plan to position and increase demand for the OW tourism product.
- ***THRUST 3:*** Orange Walk will ensure a properly trained tourism workforce to ensure the delivery of quality and unforgettable visitor experiences.

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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>18</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 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

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<sup>18</sup> UNEP & WTO, 2005. Making Tourism More Sustainable: A Guide for Policy Makers

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 three main goals/thrusts outlined in the previous section. These key strategies and activities make up the core elements of the Orange Walk Tourism Destination Development Plan. The strategic objectives and corresponding activities are presented under their aligned thrusts.

## **THRUST 1: Orange Walk Will Develop Diversified Tourism Products**

### **Strategic Objective 1: Increase and diversify tourism products**

While the cursory analysis of tourism assets (Appendix 1) in the Orange Walk Destination shows a diversified and plentiful asset base, the analysis also identifies that most of these assets require considerable development for these assets to be brought to market and form part of the tourism product. The destination's tourism offering is underdeveloped. There is an urgent need to increase the quantity and diversity of product offerings. This will allow visitors to have more options regarding the number and types of experiences.

The Lamanai Archaeological Site is the anchor tourism product for Orange Walk. Excursions to the Lamanai Archaeological Site are the most popular activity for visitors (both cruise and stay-over). This flow of tourists to Lamanai does result in some economic benefits to businesses in Orange Walk Town. However, this visitor flow is threatened by the opening of a new road that bypasses Orange Walk Town.<sup>19</sup> In this context, it is even more critical to ensure that more compelling experiences are developed to draw visitors (international and domestic) in and around Orange Walk Town.

To increase and diversify the tourism products in Orange Walk, the following strategic initiatives will be implemented:

#### **a) Revitalize Orange Walk Town as an urban tourism destination**

Orange Walk Town is the administrative and commercial center of the district. However, it is not typically considered as a significant tourism destination by visitors. Instead, visitors customarily pass through Orange Walk Town en-route to other destinations, for example, Chetumal City in nearby Mexico and Belize City, despite the town's many cultural heritage and other assets.

This initiative proposes using placemaking as a springboard for community revitalization and tourism development in Orange Walk Town. It is often said that a good place to live is an excellent place to visit. The town revitalization initiative consists of three main components that represent elements of nature and culture that are most representative of what's unique to Orange Walk Town. These are:

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<sup>19</sup> Reduces Orange Walk stakeholder participation and benefit.

- a) Gastronomy & rum production
- b) The New River
- c) Historical monuments

#### **b) Develop culinary tourism**

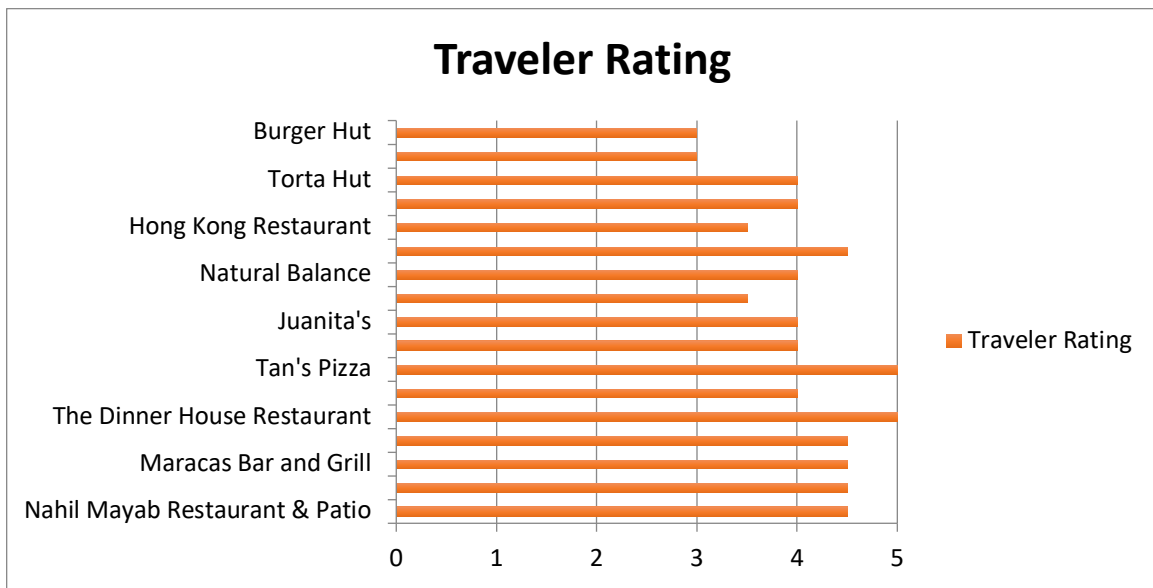
Culinary tourism is one of the fastest growing trends in the travel industry. Food ranks alongside climate, accommodation and scenery in importance to tourists. Orange Walk Town is very well known nationally for its street food as well as many restaurants that offer a wide range of Mestizo culinary delights. In addition to food, Orange Walk is also known for rum production as two of the country's three rum distilleries are located in the district. Gastronomy can evolve into a salient differentiator for Orange Walk Town.

Culinary tourism draws international and local visitors. Without any effort, Orange Walk already attracts residents of Belize City who often stop-over for street food, especially tacos, on their way to points further north in the country or on general outings. New and creative culinary experiences such as culinary tours, food and rum events, and 'foodie' competitions can offer both locals and tourists, including cruise ship visitors, similar to an authentic taste of place.

This effort does require restaurateurs and street food vendors to organize formally to plan the development of new memorable eating and drinking experiences collectively.

Currently, there are 18 restaurants, 1 dessert shop, and one bakery listed on TripAdvisor for Orange Walk. A TripAdvisor analysis showed that the tourists generally enjoy the restaurants both regarding food and customer service. Visitors enjoyed foods that were more authentic to Belize and that used local ingredients. Also, restaurants were very accommodating to dietary restrictions which is extremely important for tourists. The figure below shows the TripAdvisor ranking for 16 restaurants in Orange Walk. The dessert shop and bakery each obtained a ranking of 4.5/5, and one restaurant was excluded because it did not have any rankings. The restaurants are listed from least lowest ranking to highest, with the #1 restaurant on TripAdvisor at the bottom of the chart. The average rating was 4.13/5.

**FIGURE 12: TRAVELER RATING**



**c) Develop riverfront for enhanced river tourism**

The New River is the longest river in the country. It drains primarily the eastern part of the Orange Walk District during its north-north-easterly course, passes through Orange Walk Town, and empties into the Chetumal Bay. The river also forms the New River Lagoon, the most substantial body of fresh water in Belize, just east of the Lamanai Archaeological Site. The New River is a habitat for numerous fish and bird species, as well as the morelet's crocodile.

The river is underutilized due to lacking riverfront development. Consideration should be given to the construction of a proper docking facility with relevant amenities that take advantage of the riverfront.

In regards to using the river for tours, a river circuit could be designed to incorporate sightseeing of natural attractions and make stops at critical points, with some cruise options that incorporate food and rum.

**d) Identify, prioritize and rehabilitate key historical sites**

There are several historical sites located in Orange Walk Town (Fort Mundy, Fort Cairns, Barracks, Marcus Canul Monument, La Inmaculada Church etc.). Development of these sites will contribute to the town's appeal. An exercise to identify all the sites, and prioritize them based on their historical significance and aesthetic appeal, will be done. After which, selected prioritized sites will be rehabilitated.

This multifaceted revitalization initiative can enhance a sense of place in Orange Walk Town and develop compelling differentiators to set it apart from other destinations in Belize. The various themes—culinary tourism, river tourism and historical monuments—are appealing to stay-over, cruise and domestic visitors.

#### **e) Implement the “Exploring Holpatin” Tourism Corridor**

The Holpatin Tourism Corridor encompasses five rural villages in western Orange Walk that include Yo Creek, San Antonio, San Lazaro, Trinidad, and August Pine Ridge spanning a length of 10.56 miles (17 km). This proposed tourism corridor provides villages with an opportunity to develop community-based cultural tourism.

The development plan for the corridor identifies six attractions each located at one of the five target villages for tourism development. Furthermore, villages can consider developing homestays as well as home or community restaurants to attract day and stay-over tourists.

The Exploring Holpatin projects aim to boost economic activity in rural communities in the Orange Walk District and benefit cultural groups, artisans, tour operators, accommodation owners and tour guides.

The design of the Holpatin Community Project will be finalized and implemented. This rural tourism product will need to be designed for international visitors primarily since it is not a viable option for cruise ship visitors.

#### **f) Lobby for access to Cuello Archaeological Site**

Located two miles from Orange Walk Town on the Yo Creek Road, the Cuello Archaeological Site dates back to 900BC and contains one of the oldest steam bathe found to date in the Maya lowlands. The site, however, is located on privately owned land, and accessibility is not always readily available to tourism stakeholders and visitors. Given its proximity and historical significance, it is believed that the site can be a significant tourist attraction. Efforts will be made in collaboration with the Department of Archaeology, tourism stakeholders (BTB, BTIA, MOT), and the private landowner to determine a path forward in allowing public access to the site.

Creating reliable access to Cuello Archaeological Site can make more compelling Orange Walk Town as an urban tourism destination.

#### **g) Develop agro-tourism experiences**

Agro-tourism involves any agriculture-based operation or activity that brings visitors to a farm or ranch for their enjoyment, outdoor recreation activities, education, shopping, dining or even lodging. Agriculture ranks at the top of Orange Walk’s leading economic

sectors. Majority of its population is located in rural areas with many households engaged in agriculture, in particular, cane farming.

Agro-tourism experiences can be designed and developed around Orange Walk farming resources. Two categories will be explored that include: (1) Day Farm – visits usually located near national highways and main business area; and (2) Farm Stay – offers accommodation and dining services for interactive, on-farm activities to enrich tourists' farm experience.

There are many synergies between agro-tourism and the culinary tourism theme proposed as part of urban tourism in Orange Walk Town. The farm to table concept offers restaurateurs and farmers an opportunity to cooperate to develop new and innovative experiences for the day and stay-over visitors.

#### **h) Construct an Artisanal Center/Culinary Plaza (common marketplace for selling locally produced products)**

There is no centrally located space where cultural products (artisans, culture groups, food) can be experienced. This to some extent creates a problem for cultural visitors<sup>20</sup>. The lack of a central space also limits suppliers of culture products as accessibility to the market is unreliable. Accessibility depends on suppliers' having the means to physically go to the market or the market coming to them.

This situation will be addressed through the identification of a central space and construction of a common marketplace for selling locally produced products, food, and culture display/presentation.

#### **i) Explore the development of tourism clusters**

The tourism cluster consists of a group of resources and attractions, business and institutions directly or indirectly involved in tourism, concentrated in a particular geographic area. The concept of the Holpatin Tourism Corridor is an excellent example of a tourism cluster. Based on the results of the Holpatin Community Project, other tourism clusters will be identified and developed.

#### **j) Assess the Orange Walk Destination tourism assets**

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

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<sup>20</sup> Consume places and experiences intensively, in short periods of time due to the high opportunity cost of travel.

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.

## **Strategic Objective 2: Support the development of micro- and small tourism enterprises**

A sustainable tourism industry in Orange Walk will mean that 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.

### **a) Increase technical and financial support for cultural groups**

The formation of cultural groups in the destination has been led by a few individuals, intent on preserving the rich cultural history of the area. This effort, which has gain traction in recent years, has been conducted primarily through voluntary means with limited formal processes. To further build the culture product, stakeholders need to obtain financial benefits as this will attract the involvement and participation of others, especially younger persons. To this end, increased technical and financial support will be provided to the cultural groups to formalize and further develop their products. The type of support required includes business training, facilitation of marketing and promotion, sponsorships of events, and assistance in obtaining donor support (identification & proposal development).

### **b) Conduct business management training for local businesses**

Local entrepreneurs including operators will be able to succeed if they have the right level of support. There is a need to provide support in developing, and pricing services for the tourism industry. Aside from this, there is also the need to improve business management skills. There are opportunities for local residents to become involved in the tourism industry and to develop their own businesses however many have not had the experience of actually being in business. The Small Business Development Center arm of Beltraide (SBDC) is especially suited for this type of development, and therefore, a partnership with the SBDC will need to be developed in order to bring their business mentoring and development services to Orange Walk entrepreneurs. This training can be provided on-site through workshops throughout the year.

### **Strategic Objective 3: Enhance critical infrastructure that supports tourism**

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

#### **a) Install signage at strategic locations throughout the Destination**

Well-designed welcoming, directional (way-finding), and location signs within Orange Walk District and the town and villages to facilitate visitors during their stay will be installed.

#### **b) Improve road access to key destinations**

Several key tourism assets are located in rural parts of Orange Walk where road conditions make accessibility difficult. This situation is symptomatic of the country's weak transport infrastructure network (roads, ports, and aviation) that limits the performance of its key sectors. In response to this, the country plans to develop its infrastructure (inclusive of transport) to support the key drivers of the country's economy, tourism and agriculture <sup>21</sup>.

To this end, several miles of roads will be upgraded in Orange Walk to improve access to areas that have critical tourism resources. The Orange Walk/San Estevan road that improves connection to Honey Camp and the road system along Lamanai San Felipe Corridor will be upgraded.

#### **c) Advocate for improved solid waste and wastewater treatment for OW Town**

Residents of Orange Walk Town currently use individual household septic tanks for the treatment of solid waste. These are generally made from concrete cement and placed underground, for the collection of sewage where it is allowed to decompose through bacterial activity before draining using a leaching field. Household wastewater, on the other hand, is typically funnelled to open drains along street sides.

The current situation of improper treatment of solid waste and wastewater can lead to contamination of groundwater and other health-related issues. There is a need for the town to have improved solid waste and wastewater treatment. Stakeholders will lobby for the installation of a sewer system for Orange Walk Town.

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<sup>21</sup> The Comprehensive National Transportation Master Plan of Belize, 2018.

## **Strategic Objective 4: Advocate for responsible use and management of natural and cultural attractions and sites**

Tourism will never be completely sustainable as every industry has impacts, but there should be a conscious effort to work towards the responsible management of those assets that are beneficial for tourism. Although not everything depends on tourism, tourism depends on almost everything. A balance must be found between limits and usage so that continuous changing, monitoring and planning ensure that tourism can be managed<sup>22</sup>. This requires thinking long-term and making changes now in order to reduce negative and irreversible impacts on resources.

### **a) Conduct carrying capacity study of Lamanai Archaeological Site**

Located on the west bank of the New River Lagoon in Orange Walk District, Lamanai Archaeological Site is the third most visited Mayan site in Belize, behind only Xunantunich located in Cayo District and Altun Ha located in Belize District. The site attracts visitors year-round with a peak from January to March. Over the years, visitation has increased to where there were 63,523 visitors in 2016<sup>23</sup>. There has been some evidence of environmental damage to the site (temples and ecosystem) over the years that experts believe is linked to the increased visitation at the site.

To reduce the negative impact on the site from visitors, a carrying capacity study will be done and appropriate recommendations made. Visitor capacity is a component of visitor use management and is the maximum amounts and types of visitor use that an area can accommodate while achieving and maintaining the desired resource conditions and visitor experiences that are consistent with the purposes for which the area was established.

### **b) Assess and publish environmental state of New River for pollution**

Anecdotal information indicates that the New River is polluted. Over the years, there have been several reported fish kills and Orange Walk residents continue to be concerned about the health of the river. The deteriorating state of the river is linked to alleged improper waste disposal practices of some significant factories/businesses that operate nearby. A comprehensive study on the health of the New River will be conducted with accompanying recommendations.

### **c) Promote environmental best practices in agriculture**

Experiencing the natural environment is a significant attraction for visitors. However, often there are conflicts between sustaining the health of the natural environment and the demand for food through agricultural practices. Agriculture, if conducted in an

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<sup>22</sup> <https://sustainabletourism.net/>

<sup>23</sup> Department of Archaeology

unsustainable manner, has some negative impacts that include: 1) Degradation of Land; 2) Deforestation; 3. Loss of Biodiversity; 4. Pest Problem; and 5. Inadequate Disposal of Industrial & Agricultural Wastes. When these issues arise, they, in turn, have a negative impact on a destination's attractiveness.

Noting that agriculture is the leading industry in Orange Walk, a programme to promote environmental best practices in agriculture targeting farmers will be conducted to reduce the risk of adverse impacts on the environment.

#### **d) Conduct a public environmental education campaign**

A public environmental education campaign will be conducted. The primary objective of the campaign will be to demonstrate the economic, social, and health benefits of a healthy environment. Also, the campaign will show the link between the environment and tourism.

### **Strategic Objective 5: Ensure quality, health & safety standards in place to support the OW Destination**

An important aspect of ensuring quality visitor experience is to ensure health and safety conditions are upheld. Minimum standards and safety procedures are established to mitigate incidences that may be harmful to visitors and residents alike. While there are never guarantees, any measure that improves visitor health and safety should be enacted.

#### **a) Improve navigation/transportation safety on New River**

With increasing boat traffic in the New River, there is a need to address navigation safety to reduce risks of groundings and collisions. A guideline for operating vessels in the river will be developed and shared with boat operators and signage will be installed along frequented routes along the river.

#### **b) Establish minimum health, safety and security standards for tourism establishments**

The Minimum Standards are a set of measurable criteria that outline items and services that must be in place for a tourism establishment (hotels, restaurants, etc.) to operate according to internationally-recognized standards in relation to health, safety and security. In collaboration with industry stakeholders, minimum health, safety and security standards will be established for tourism establishments. This will be done to enhance and maintain the quality of services provided to visitors.

#### **c) Improve lighting in OW Town**

Orange Walk Town has several dark and unlighted areas. These conditions enhance vulnerabilities to crime and should be addressed through improved lighting. Common

public areas will be investigated to determine lighting conditions, and if needed, lighting will be improved.

#### **d) Develop safety and emergency plan for the destination**

While Orange Walk Town has an emergency plan, rural areas do not. Rural communities rely on assistance and lead from central government during times of emergencies. A comprehensive safety and emergency plan for the destination will be developed in collaboration with key stakeholders and will take into consideration the unique conditions of the various communities in the destination.

### **THRUST 2: Orange Walk Will Develop and Implement a Comprehensive Branding and Marketing Plan**

#### **Strategic Objective 6: Develop a brand for OW destination**

Orange Walk as a destination has weak brand strength in part due to insufficient and unsustained marketing efforts and limited availability of developed tourism products. A common identifiable brand that embodies the unique features of Orange Walk will need to be developed. Establishing this can be a selling point for all operators and stakeholders and what Orange Walk has to offer can be better communicated.

#### **a) Develop and promote the Orange Walk Brand**

Orange Walk's vision and core tourism product tout an authentic cultural experience. Dangriga also touts a cultural tourism experience. It is thus necessary for Orange Walk to develop a brand for its product. The branding exercise will have the primary goal of creating a logo and motto to identify Orange Walk as a unique destination. Given the BTB's success in creating brands, the BTB will be requested to assist the destination to assist in developing the brand. The branding strategy will thus include the following activities:

1. Identify the brand opportunity- consumer analysis and competitive positioning
2. Define the brand identity and strategy
3. Implement brand strategy

#### **Strategic Objective 7: Destination marketing and promotion**

In any business, marketing and promotion play a crucial role in building a brand, alluring new customers and maintaining loyalty. The tourism industry is no different. In Orange Walk, there is a lack of marketing efforts to attract visitors to the destination. The information that does exist on the area is provided by independent sources and not reflective of a united destination effort.

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

Orange Walk District's tourism market share is 2%. This figure is based on room sales. To increase market share, destination tourism leaders and leading organizations will need to come together and develop a cohesive marketing plan that defines realistic goals for growth and presents a blueprint for how key stakeholders, including but not limited to government agencies at the national and local levels, private industry including hotels, tour operators, transportation providers, tour guides and trade associations at the national and local level as well as the NGO community will actively share responsibility for its implementation.

The marketing plan will set goals for cruise, stay-over and domestic visitation. The marketing plan should also include practical strategies for engaging with travel trade, i.e. tour operators, wholesalers, travel agents, and online retailers—to market the destination effectively. The plan should also articulate how destination marketing efforts will be sustained over time—both from a financial and human resources standpoint. A mechanism will need to be established 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:

1. Include OW tourism product offering in national tourism promotions;
2. Create and publicize inventory of tourism experiences and events for the Destination; and
3. Design and launch media (website, social media, collateral materials) for promoting the Destination.

## **THRUST 3: Orange Walk Will Ensure a Properly Trained Tourism Workforce**

### **Strategic Objective 8: Accessible and affordable training opportunities in the destination**

Having a well-trained workforce is critical to the development of a high-quality product for the Orange Walk destination. While there are some persons who are already working in the tourism sector, there is a need for increasing the number of persons engaged in tourism in the destination to meet the expected demand as the sector grows. Also, there is a need for enhancing the skills of existing tourism practitioners. This will involve training of new entrants into the industry and improving the capacity of those already operating in the industry.

**a) Conduct training targeting artisans in product quality and standardization**

Many agencies provide short-term and targeted training on an annual basis. Specific standards were developed under the “Unique Belize” programme which was housed at the BTB. This training and product standards aimed to create and maintain minimum standards for authentic Belizean artisan products. This programme will be applied to train the artisan population in Orange Walk.

**b) Support peer-to-peer tourism exchanges**

Tourism is more developed and pronounced in other areas of the country such as Cayo, San Pedro, Placencia, and Belize City. The result is that there is more trained and experienced personnel in these areas. As a method for training and professional development, a system of tourism employee exchange will be developed that will afford Orange Walk tourism practitioners to understudy and train with their industry partners in other parts of the country. This tourism exchange will also be expanded to include exchange arrangements with the State of Quintana Roo in Mexico.

**c) Adopt and implement the national tourism training programme in local educational institutions**

In an earlier analysis of the current status of the Orange Walk tourism product, it was highlighted that training in the sector was a significant deficiency. The analysis pointed to the leading providers of tourism training to be the ITVET and Muffles Junior College (MJC). The nearest institution to provide some tourism training is the Centro Escolar Junior College near the border of the Orange Walk and Corozal districts. Now that tourism is being cited as an emerging economic activity for the district, it will be necessary to develop the human resource capacity to deliver the tourism product. There will be a need for training at the front line and the supervisory/managerial levels. The NSTMP has a target for a national tourism training institute to cover these training; however, in the absence of this, the district should develop its own training. The OW ITVET should implement the tourism training programmes offered at other ITVET sites in Belize City and Cayo (Food and Beverage, Front Desk, etc.). The ITVETs are chartered to train at the front line level, but the district will also need trained personnel at the supervisory/managerial level. MJC can fill this void. MJC can adopt the curriculum from existing tourism training programmes using the Caribbean Tourism Organisation’s curriculum or that of its ATLIB (Association of Tertiary Level Institutions of Belize) partners.

**d) Integrate tourism studies into the secondary school curriculum**

Tourism studies are included in the secondary school curriculum as an option in the fourth form. Given the importance of tourism to Belize’s economy, work will be done with

the Ministry of Education to integrate tourism into the curriculum as a mandatory requirement.

### **Strategic Objective 9: Maintain and enhance partnerships with primary national and local tourism stakeholders**

Because of tourism's multifaceted nature, it impacts many aspects of the socio-economic situation of a destination. While not everything depends on tourism, the sector does depend on almost everything. As such, tourism stakeholders need to be aware of not just what's taking place in the tourism sector but other sectors as well. Knowledge of what's taking place will assist in determining measures that can be taken to move the sector on a positive path. This is more likely to happen though when partnerships are established among key stakeholders within and outside the sector.

#### **a) Establish strategic alliances amongst key tourism industry/ destination stakeholders**

Tourism success relies on strong and meaningful partnerships with stakeholders. These partnerships must be continuous and long-lasting. For tourism to be successful in Orange Walk, it is imperative that strategic alliances are formed amongst the following stakeholders:

1. The Destination Development team of the BTB
2. The Destination planner of the MTCA
3. The Chairman of the BTIA Orange Walk Chapter
4. The Councillor responsible for tourism of the Orange Walk Town Council.

## 6. Tourism Investment Project Ideas

### 6.1 Identification of Priority Investments

Table 13 contains investment project ideas (with broad cost projections) for improving the product that Orange Walk will provide.

**TABLE 13: ORANGE WALK PRIORITY INVESTMENT PROPOSALS**

Orange Walk priority investment proposals				
Project Ideas (Related Thrusts/ Objectives)	Description	Target Date	Responsible Party	Projected Cost (BZ\$) (Indicative) <sup>24</sup>
Holpatin Trail  • Thrust 1 • Primary Strategic Objective: 1e • Secondary Strategic Objectives: 1g, 1h, 2a and 3a	1. Directional signage (location and directional signs)	July 2019	BTB	\$10,400
	2. Marketing/branding strategy	July 2019	BTB	\$20,000
	3. Training in hospitality, artisanal works from beeswax and other	May 2019	BTB	\$10,000
	4. Development of tour scripts for rum tour and museum and other	May 2019	MTCA and BTB	\$5,000
	5. Training for cultural performances (including procurement of costumes, gear, etc.)	June 2019 and ongoing	BTB	\$15,000
	6. Remodelling of the Yo Creek Community Centre as a Cultural Centre	July 2019	BTB	\$50,000
	7. Specialized training of local tour guides in conducting rum tours	July 2019	BTB and BTIA-OW	\$5,000

<sup>24</sup> These are very broad cost projections and should not be considered accurate.

Orange Walk priority investment proposals				
Project Ideas (Related Thrusts/ Objectives)	Description	Target Date	Responsible Party	Projected Cost (BZ\$) (Indicative) 24
	8. Soft skills training in outdoor activities such as medicinal trails.	March 2020	BTB and Programme for Belize	\$10,000
Orange Walk Town Tour <ul style="list-style-type: none"> <li>• Thrust 1</li> <li>• Primary Strategic Objectives: 1a, 1d, 4g</li> <li>• Secondary Strategic Objectives: 6a and 7a (Thrust 2)</li> </ul>	Infrastructural improvements such as restoration of the Forts and perimeter fencing, walkways to the structures and defined stairways, a space for events, interpretive signs, and night time illumination, will need to be done.	June 2020	BTB, MTCA, IDB	\$200,000
River tours <ul style="list-style-type: none"> <li>• Thrust 1</li> <li>• Primary Strategic Objective: 1c</li> <li>• Secondary Strategic Objectives: 4b, 4e</li> </ul>	Construction and improvements of boat docking facilities, pedestrian access and pathways along the river banks, riverfront access.	March 2021	BTB, MTCA, IDB	\$400,000
Maya Mestizo Dances <ul style="list-style-type: none"> <li>• Thrust 1</li> <li>• Primary Strategic Objective: 2a</li> </ul>	Several groups continue to practice the art of Maya Mestizo Dances. These dance troupes need adequately designed and manufactured garments, headdresses, and accessories, as well as training in choreography, the art of the dance, marketing, and other related skills.	March 2020	BTB	\$20,000

Orange Walk priority investment proposals				
Project Ideas (Related Thrusts/ Objectives)	Description	Target Date	Responsible Party	Projected Cost (BZ\$) (Indicative) 24
<ul style="list-style-type: none"> <li>Secondary Strategic Objectives: 2b, 7a (Thrust 2)</li> </ul>				
Poktapok Maya Ball Game <ul style="list-style-type: none"> <li>Thrust 1</li> <li>Primary Strategic Objective: 2a</li> <li>Secondary Strategic Objectives: 2b, 7a (Thrust 2)</li> </ul>	Poktapok is a Maya ballgame, with the ritual association. Historically, before the game's commencement, there was a religious aspect to the game. Now, it is played for recreation. Resources should be invested to create a Poktapok League, with adequately designed ball courts (portable plywood wall with fiberglass ball hoop), and proper garments, headdresses, and accessories.	September 2019	BTB	\$8,000
Maya/Mestizo Cuisine <ul style="list-style-type: none"> <li>Thrust 1</li> <li>Primary Strategic Objective: 1b</li> <li>Secondary Strategic Objectives: 2a, 2b</li> </ul>	Culinary and food art training in the preparation and presentation of meals with a Maya/Mestizo fusion. Training in menu preparation and food costing techniques.	June 2020	BTB	\$20,000
Lamanai Archaeological Site <ul style="list-style-type: none"> <li>Thrust 1</li> </ul>	Improvements to the access road from San Felipe to Indian Church (11 miles) into an all-weather road – this is the only section of road that has not been paved. Other improvements such as perimeter fencing around the 1,000 acres Forest Reserve.	May 2022	MOW, MTCA, NICH	\$4,100,000

Orange Walk priority investment proposals				
Project Ideas (Related Thrusts/ Objectives)	Description	Target Date	Responsible Party	Projected Cost (BZ\$) (Indicative) 24
<ul style="list-style-type: none"> <li>Primary Strategic Objectives: 1d, 3b</li> <li>Secondary Strategic Objectives: 4a, 4f and 4h</li> </ul>				
Shipyard <ul style="list-style-type: none"> <li>Thrust 1</li> <li>Primary Strategic Objectives: 1g</li> <li>Secondary Strategic Objectives: 2a, 3a and 4c</li> </ul>	The setting up of a Shipyard Cultural Trail that incorporates a few of the 65 camps. The trail will provide an experiential tour of the Shipyard are Plautdietsch speaking ethnic Mennonites, and their traditional lifestyle, living in an integrated community where most of them work as carpenters, farmers and mechanics. They have established a cheese factory.	June 2020	BTB	\$15,000
Festival Series <ul style="list-style-type: none"> <li>Thrust 1</li> <li>Primary Strategic Objectives: 1a</li> <li>Secondary Strategic Objectives: 1b, 6a, 7a</li> </ul>	A Festival Series that incorporates and calendarizes the various events that take place annually in Orange Walk. Marketing/promotion, as well as festival planning and budgeting, will be carried out.	Various	BTB and BTIA-OW Chapter	\$10,000 per festival
Signage <ul style="list-style-type: none"> <li>Thrust 1</li> </ul>	Well-designed welcoming, directional (way-finding), and location signs within Orange Walk District and the town and villages to facilitate visitors during their	June 2019	BTB	\$23,200

Orange Walk priority investment proposals				
Project Ideas (Related Thrusts/ Objectives)	Description	Target Date	Responsible Party	Projected Cost (BZ\$) (Indicative) 24
<ul style="list-style-type: none"> <li>Primary Strategic Objectives: 3a</li> <li>Secondary Strategic Objectives: 1a</li> </ul>	stay: 2 entering town, 5 around town, 2 leaving town, 24 directional signs, and 7 in the Shipyard area.			

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

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

### Financial Institutions

Financial institutions are a significant source of infrastructure development funding, through commercial loans extended to infrastructure project developers. The main private sector financial institutions in Belize include four commercial banks and six major credit unions. Table 14 shows the list of private sector financial institutions.

**TABLE 14: 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 15: ORANGE WALK PRIORITY PRODUCT CLUSTERS**

<b>Product Cluster</b>  <b>(Related to Thrust/Objective)</b>	<b>Description</b>	<b>Itinerary</b>
<p>Holpatin Trail</p> <ul style="list-style-type: none"> <li>• Thrust 1</li> <li>• Primary Strategic Objective: 1e</li> <li>• Secondary Strategic Objectives: 1g, 1h, 2a and 3a</li> </ul>	<p>The Exploring Holpatin Tourism Trail encompasses six rural villages in western Orange Walk from Yo Creek to San Felipe. Each village is designated a unique and specific community tourism attraction and product which forms part of the Trail. Attractions featured include Yucatec Maya museum, cultural dances/ball games, traditional cuisine, cenotes, api/agritourism, rum museum, as well as Lamanai archaeological site and Cuello Site.</p>	<p>Starting at Orange Walk Town, includes stops at Yo Creek, San Antonio, San Lazaro, Trinidad, August Pine Ridge, San Felipe based on the tour package. 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</li> <li>3. Cultural</li> <li>4. Cenotes</li> <li>5. Archaeological</li> <li>6. Rum/Sugar Industry</li> <li>7. Combination</li> </ol>
<p>Orange Walk Town</p> <ul style="list-style-type: none"> <li>• Thrust 1</li> <li>• Primary Strategic Objectives: 1a, 1d, 4g</li> <li>• Secondary Strategic Objectives: 6a and 7a (Thrust 2)</li> </ul>	<p>A tour of Orange Walk Town that features stops at the main historical and cultural sites and attractions of the municipality, e.g., Fort Mundy, Fort Cairnes, Anglican Church, Catholic Church, Banquitas House of Culture, the Central Park, area of the Battle of Orange Walk Town, Holpatin site (under Police Station), Nuevo San Jose Palmar, and other vital sites (e.g., the BSI sugar factory). The tour includes urban birding along a stretch of the New River. The tour can also integrate short river tours to view crocodiles, birds and other wildlife. Tours can be done during the day or at night.</p>	<p>Tours within Orange Walk Town with a stop at the bordering Nuevo San Jose Palmar Village and possibly at the BSI sugar factory, depending on the focus of the tour. Tour focal options include:</p> <ol style="list-style-type: none"> <li>1. Culture</li> <li>2. History</li> <li>3. Birding</li> <li>4. River wildlife viewing</li> <li>5. River trips (see below)</li> </ol>

<b>Product Cluster</b>  <b>(Related to Thrust/Objective)</b>	<b>Description</b>	<b>Itinerary</b>
<p>The New River</p> <ul style="list-style-type: none"> <li>• Thrust 1</li> <li>• Primary Strategic Objective: 1c</li> <li>• Secondary Strategic Objectives: 4b, 4e</li> </ul>	<p>Tours on skiffs or pontoons on the New River, from Hill Bank/Lamanai all the way to Corozal Bay/Cerros.</p>	<p>Excursion options include:</p> <ol style="list-style-type: none"> <li>1. Tours to Lamanai Archaeological Site (existing)</li> <li>2. Tours to Cerros Archaeological Site</li> <li>3. Birdwatching or wildlife viewing tours (including night-time crocodile watching)</li> <li>4. Evening dining on the river</li> <li>5. Tours to Shipyard, including a stop at Guinea Grass (historical-cultural – to experience the Mennonite way of life)</li> <li>6. Sports fishing tours (e.g., trolling for snook or tarpon)</li> </ol>
<p>Festival and Events</p> <ul style="list-style-type: none"> <li>• Thrust 1</li> <li>• Primary Strategic Objectives: 1a</li> <li>• Secondary Strategic Objectives: 1b, 6a, 7a</li> </ul>	<p>Festivals include events such as Fiestarama, BTIA Rum Festival, Tacos Festival, Orange Walk Tourism Expo, Maya Heroes Day, Pre-Lent celebration known as Juan Carnaval, Lenten Saw Dust Tapestries/ carpets on Good Friday, Nuevo San Jose Palmar Day, Forward Movement, San Jose San Pablo Culture Day, Cane Farmers' Day, Garifuna Settlement Day Yurumein and Thanksgiving Mass, Sugar Fest, All Saints Day, 24th May Orange Walk Day, and the New River Challenge (canoe race).</p>	<p>Based on the dates of the specific events, which take place mostly within and in the vicinity of Orange Walk Town.</p>

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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 Orange Walk 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 Orange Walk 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 Orange Walk Town Council:

- The Councilor with tourism portfolio shall be assigned to sit on the TDDP MCC.
- The OWTC shall integrate relevant components of the TDDP into its annual work plans and budgets.
- As such, the OWTC 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 (Orange Walk 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 Orange Walk in line with the implementation of the NSTMP, and the Orange Walk 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 MTC – *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.

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## 9. Strategies and Monitoring Indicators for Success

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

Strategies	Monitoring Indicators
<b>Strategy 1</b> Increase and diversify tourism products	<ul style="list-style-type: none"><li>• % increase in the number of tourism product offers in the destination</li><li>• Number of tourism businesses registered</li><li>• Number of new tourism sites becomes accessible and used</li></ul>
<b>Strategy 2</b> Support the development of micro- and small tourism enterprises	<ul style="list-style-type: none"><li>• Number of cultural groups that access technical &amp; financial support</li><li>• % increase in the number of events/shows/activities hosted by cultural groups</li><li>• % increase in the number of formal cultural groups</li></ul>
<b>Strategy 3</b> Enhance critical infrastructure that supports tourism	<ul style="list-style-type: none"><li>• % of tourism assets demarcated</li><li>• Miles of road improved</li><li>• Reduction in travel time to key destinations</li><li>• Coverage of solid waste and wastewater issues in the media</li><li>• Solid waste and wastewater issues in OW become a political discussion</li></ul>
<b>Strategy 4</b> Advocate for responsible use and management of natural and cultural attractions and sites	<ul style="list-style-type: none"><li>• Limit to the number of visitors to Lamanai Archeological Site established</li><li>• Knowledge about the environmental state of New River</li><li>• % increase of farmers using environmental best practices in agriculture</li><li>• % of residents with knowledge of benefits of a healthy environment</li></ul>

<b>Strategies</b>	<b>Monitoring Indicators</b>
<b>Strategy 5</b>  Ensure quality, health & safety standards in place to support the OW Destination	<ul style="list-style-type: none"> <li>• Reduced incidences of accidents in the New River</li> <li>• % of tourism establishments that meet minimum standards</li> <li>• Publicly available crisis and emergency response plan that considers the tourism sector</li> </ul>
<b>Strategy 6</b>  Develop a brand for OW destination	<ul style="list-style-type: none"> <li>• Increase awareness about Orange Walk's destination brand</li> </ul>
<b>Strategy 7</b>  Destination marketing and promotion	<ul style="list-style-type: none"> <li>• Increase in number of visitors to the destination</li> <li>• Number of promotional items that mention the destination</li> <li>• Social media reach</li> <li>• Destination promotional messages that represent local communities and visitors authentically and respectfully</li> </ul>
<b>Strategy 8</b>  Accessible and affordable training opportunities in the destination	<ul style="list-style-type: none"> <li>• Number of women/men/youths who get tourism training</li> <li>• Number of specialized training conducted</li> </ul>
<b>Strategy 9</b>  Maintain and enhance partnerships with primary national and local tourism stakeholders	<ul style="list-style-type: none"> <li>• Number of MOUs established for tourism in OW</li> <li>• Amounts spent on tourism in Orange Walk by identified partners</li> </ul>

## 10. Implementation Schedule

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

STRATEGIC OBJECTIVES	KEY ACTIVITIES	TIMEFRAME 2019 - 2024																RESPONSIBLE PARTY					
		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. Increase and diversify tourism products	a. Revitalize Orange Walk Town as an urban tourism destination			X	X	X	X	X	X														OW Town Council
	b. Develop culinary tourism	X	X	X	X																		BTB
	c. Develop riverfront for enhanced river tourism		X	X	X																		BTB
	d. Identify, prioritize and rehabilitate key historical sites									X	X	X	X	X	X	X	X	X	X	X	X	X	OW Town Council
	e. Implement the “Exploring Holpatin” Tourism Corridor			X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	MOT
	f. Lobby for access to Cuello Archaeological Site	X	X	X	X																		IA





7. Destination marketing and promotion	a. Develop and implement a marketing strategy				X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	BTB
8. Accessible and affordable training opportunities in the destination	a. Conduct training targeting artisans in product quality and standardization		X	X			X	X			X	X			X	X			X	X	Beltraide
	b. Support peer-to-peer tourism exchanges			X				X			X				X				X		MOT
	c. Adopt and implement the national tourism training programme in local educational institutions			X	X	X	X	X	X	X	X	X	X								MOE
	d. Integrate tourism studies into the secondary school curriculum			X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	MOE
9. Maintain and enhance partnerships with primary national and local tourism stakeholders	a. Establish strategic alliances amongst key tourism industry/destination stakeholders	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	BTIA OW

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## SECTION 3: APPENDICES

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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 Orange Walk 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, Orange Walk Municipal Development Plan, BTIA proposal to CARSI (Holpatin Cultural Trail Concept), and BTB and SIB tourism statistics (arrivals, hotel occupancy, length of stay, etc.), among others.

### **Initial Meeting**

An initial meeting was conducted with key Orange Walk tourism stakeholders. The primary purpose of the initial meeting was to inform the destinations' tourism stakeholders about the consulting assignment and the need for their participation and involvement in developing the destination's plan. During the initial meeting, the following activities occurred: 1) stakeholders were introduced to the consulting team, 2)

the assignment's work plan was presented, 3) presentation of and discussion on a preliminary destination diagnosis, 4) identification of some of the destination's significant assets, and 5) categorization of tourism stakeholders into sub-sectors and associated groups. Table 16 shows the sub-sector categorization of tourism stakeholders.

**TABLE 16: STAKEHOLDER SUB-SECTORS**

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

See Appendices 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 for the list of focus group participants.

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

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

## **Planning Sessions**

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

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

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

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

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

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

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

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

## **Analysis & Reporting Phase**

The Analysis and Reporting Phase involved gathering all data results and sorting the data into categories related to the TOR requirements. This information was then analysed and used to support to develop the first draft of the TDDP for Orange Walk. 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 – Orange Walk Tourism Assets**

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

<b>Orange Assets</b>	<b>Walk</b>	<b>Description of Assets</b>	<b>Tourism Purpose</b>	<b>Tourism Readiness</b>
<b>Natural Resources</b>				
1. Yalbac area (including Yalbac)		<ul style="list-style-type: none"> <li>• Private property – owned by Yalbac Ranch &amp; Cattle Corporation</li> <li>• A cenote recently discovered – still being explored (has only been seen from the air)</li> <li>• Cara Blanca Pools – located at the base of the escarpment (Yalbac Hills) – offers a fantastic view of the Mountain Pine Ridge and Belmopan area</li> <li>• Ease of access – easier to access from the Western Highway</li> <li>• Can also be accessed via a road from Blue Creek to Yalbac Hills (all through private land)</li> </ul>	• Potential	• L
2. El Posito		<ul style="list-style-type: none"> <li>• Old Maya Well behind Guinea Grass</li> </ul>	• Potential	• L
3. San Antonio Cenote		<ul style="list-style-type: none"> <li>• Located en-route to Santa Cruz.</li> <li>• A wide open pool surrounded by diverse flora representing a place of pilgrimage for ancient Maya who would perform sacrificial offerings on site.</li> <li>• It combines cultural aspects with nature based experiences.</li> <li>• The buffer zone around the entirety of the cenote is privately owned by various individuals.</li> <li>• Threatened by contractors for use for quarry.</li> <li>• 4 but 1 is of greatest importance for development.</li> <li>• 1 Operator trying to create a package.</li> </ul>	• Potential	• L

<b>Orange Assets</b>	<b>Walk</b>	<b>Description of Assets</b>	<b>Tourism Purpose</b>	<b>Tourism Readiness</b>
4.	Cenote along Holpatin Trail	<ul style="list-style-type: none"> <li>Between August Pine Ridge and Trinidad.</li> <li>On private land.</li> </ul>	<ul style="list-style-type: none"> <li>Potential</li> </ul>	<ul style="list-style-type: none"> <li>L</li> </ul>
5.	Carbon Sequestration	<ul style="list-style-type: none"> <li>The Rio Bravo Carbon Sequestration Project was started in 1996 as one of the first REDD projects in the world. The project seeks to demonstrate that a well-designed forest conservation and management project (based at Hill Bank) can produce significant net carbon benefits that are scientifically valid and long lasting via a combination of land acquisition and sustainable forest management. Hill Bank has accommodations for visiting researchers and other guests.</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>O</li> </ul>
6.	Honey Camp Lagoon	<ul style="list-style-type: none"> <li>Freshwater lagoon located 9 miles away from Orange Walk Town.</li> <li>The surrounding area of the lagoon is mostly undeveloped properties which are privately owned.</li> <li>The water in the lagoon is clear and has a maximum depth of thirty feet, with a bottom being lined with decomposed limestone.</li> <li>The lagoon has been invaded by tilapia, which may lend itself to tilapia fishing as an activity. The lagoon is not within the National Park.</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>L</li> </ul>
7.	Doubloon Lagoon	<ul style="list-style-type: none"> <li>Lake located on the road to Honey Camp Lagoon.</li> <li>About 7.5 miles from Orange Walk Town.</li> <li>The estimate terrain elevation above sea level is 2 meters.</li> <li>Potential for canoeing, bird watching, and fishing.</li> </ul>	<ul style="list-style-type: none"> <li>Potential</li> </ul>	<ul style="list-style-type: none"> <li>L</li> </ul>
8.	New River	<ul style="list-style-type: none"> <li>Longest river that is entirely confined to Belize.</li> <li>It drains primarily the eastern part of the Orange Walk District during its north-northeasterly course and empties into the Chetumal Bay.</li> <li>Originates from the New River Lagoon.</li> <li>Habitat for numerous types of fish, birds, as well as crocodiles.</li> <li>River accessibility to Lamanai; also used by sugar barges.</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>L</li> </ul>

<b>Orange Assets</b>	<b>Walk</b>	<b>Description of Assets</b>	<b>Tourism Purpose</b>	<b>Tourism Readiness</b>
		<ul style="list-style-type: none"> <li>• Sports fishing – tarpon, snook, etc.</li> </ul>		
9.	New River Lagoon	<ul style="list-style-type: none"> <li>• The largest body of fresh water in Belize, just east of the Lamanai Archaeological Site. (Hill Bank Lagoon)</li> </ul>	<ul style="list-style-type: none"> <li>• Actual</li> </ul>	<ul style="list-style-type: none"> <li>• M</li> </ul>
10.	Blue Creek Hydro Dam/Rio Bravo	<ul style="list-style-type: none"> <li>• Generates electricity for Blue Creek.</li> <li>• Water for the rice fields.</li> <li>• Mostly swimming and picnicking area for locals.</li> </ul>	<ul style="list-style-type: none"> <li>• Actual</li> </ul>	<ul style="list-style-type: none"> <li>• L</li> </ul>
11.	The Rio Hondo	<ul style="list-style-type: none"> <li>• Approximately 150 kilometers (93 mi) long.</li> <li>• Formed from the confluence of several upper tributaries, such as Blue Creek and Chan Chich (Rio Bravo) which have their sources in Guatemala's Petén Basin region, and Booth's River which originates in the western Belizean district of Orange Walk.</li> <li>• These tributaries join to form the Hondo River near the settlements of Blue Creek Village, on the Belizean side, and La Unión on the Mexican side.</li> <li>• The river continues its north-eastern course with few other settlements along its length until reaching its outlet in Chetumal Bay.</li> <li>• Sports fishing – tarpon, snook, etc.</li> </ul>	<ul style="list-style-type: none"> <li>• Potential</li> </ul>	<ul style="list-style-type: none"> <li>• L</li> </ul>
12.	Ram Goat Creek	<ul style="list-style-type: none"> <li>• Hill Bank</li> <li>• 1.5 miles of tubing</li> <li>• Surrounded by mangroves</li> </ul>	<ul style="list-style-type: none"> <li>• Actual</li> </ul>	<ul style="list-style-type: none"> <li>• M</li> </ul>
13.	The Tower Hill Ponds	<ul style="list-style-type: none"> <li>• 4 connecting ponds at BSI</li> </ul>	<ul style="list-style-type: none"> <li>• Potential</li> </ul>	<ul style="list-style-type: none"> <li>• L</li> </ul>
14.	Chiwa Lagoon	<ul style="list-style-type: none"> <li>• Between Honey Camp Lagoon and Santa Martha Village</li> </ul>	<ul style="list-style-type: none"> <li>• Potential</li> </ul>	<ul style="list-style-type: none"> <li>• I</li> </ul>

<b>Orange Assets</b>	<b>Walk</b>	<b>Description of Assets</b>	<b>Tourism Purpose</b>	<b>Tourism Readiness</b>
		<ul style="list-style-type: none"> <li>• Used as a fishing area</li> <li>• Poor accessibility</li> </ul>		
15. Rio Bravo Conservation and Management Area		<ul style="list-style-type: none"> <li>• Private reserve established by Programme for Belize in 1988.</li> <li>• The largest terrestrial conservation area in Belize, comprising 4% of the country's total land area.</li> <li>• Visits to Rio Bravo consist primarily of researchers and university students.</li> <li>• Includes Hill Bank Research Station and La Milpa Eco-Tourism Lodge and Research Center.</li> <li>• Contains the largest concentration of Jaguar population in the country.</li> </ul>	<ul style="list-style-type: none"> <li>• Actual</li> </ul>	<ul style="list-style-type: none"> <li>• O</li> </ul>
16. Gallon Jug Agro-Industries area – includes Chan Chich Lodge		<ul style="list-style-type: none"> <li>• Big Cat tracking</li> <li>• Canoeing at Laguna Verde</li> <li>• Night Safari</li> <li>• Guided birding or archaeology tour</li> <li>• Hiking on nature trails and bicycles rides</li> </ul>	<ul style="list-style-type: none"> <li>• Actual</li> </ul>	<ul style="list-style-type: none"> <li>• O</li> </ul>
17. Aguas Turbias National Park		<ul style="list-style-type: none"> <li>• Remote and has no active management or facilities.</li> </ul>	<ul style="list-style-type: none"> <li>• N/A</li> </ul>	<ul style="list-style-type: none"> <li>• I</li> </ul>
18. Freshwater Creek Forest Reserve		<ul style="list-style-type: none"> <li>• Co-managed by CSFI (as a forest restoration area)</li> <li>• Straddles the Orange Walk and Corozal district boundary</li> <li>• No tourism facilities</li> </ul>	<ul style="list-style-type: none"> <li>• Potential</li> </ul>	<ul style="list-style-type: none"> <li>• L</li> </ul>
19. Honey Camp National Park		<ul style="list-style-type: none"> <li>• Co-managed by CSFI</li> <li>• Limited tourism facilities</li> <li>• Has cenotes and small lagoons</li> </ul>	<ul style="list-style-type: none"> <li>• Potential</li> </ul>	<ul style="list-style-type: none"> <li>• L</li> </ul>

Orange Assets	Walk	Description of Assets	Tourism Purpose	Tourism Readiness
		<ul style="list-style-type: none"> <li>Poor accessibility</li> </ul>		
20.	Dr. George Estate Savanah	<ul style="list-style-type: none"> <li>Adjacent to Savanah Splash area</li> <li>Home of numerous water and wading bird species, as well as Morelet's Crocodile</li> <li>Natural drainage area for Orange Walk Town</li> </ul>	<ul style="list-style-type: none"> <li>Potential</li> </ul>	<ul style="list-style-type: none"> <li>L</li> </ul>
21.	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 387+ (Ornate Hawk Eagle, Yucatan Endemic Bird species)</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>Fish (Tarpon)</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.	Lamanai Archaeological Site	<ul style="list-style-type: none"> <li>Renowned for its exceptionally long occupation spanning three millennia, beginning in the Early Pre-classic Maya period and continuing through the Spanish and British Colonial periods, into the 20th century.</li> <li>Boasts the third tallest Maya structure in Belize, aptly called High Temple, which stands 33 meters tall.</li> <li>Perhaps the most iconic feature of Lamanai is the Mask Temple. The masks featured on this temple is 4.2 m high.</li> <li>Structures and excavated artifacts exhibits representation of reptiles.</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>O</li> </ul>

<b>Orange Assets</b>	<b>Walk</b>	<b>Description of Assets</b>	<b>Tourism Purpose</b>	<b>Tourism Readiness</b>
2. La Milpa Archaeological Site		<ul style="list-style-type: none"> <li>• Within the Rio Bravo Conservation &amp; Management Area (see above)</li> <li>• It is the third largest site in Belize with the central plaza alone covering 18,000 square meters, making it one of the largest in the entire Maya region.</li> <li>• Newly discovered cave.</li> </ul>	• Actual	• O
3. Cuello Site		<ul style="list-style-type: none"> <li>• Located two miles on the Yo Creek Road and sits on the private land of the Cuello Family (Caribbean Rum distillery).</li> <li>• Contains residential groups clustered around central patios. It also features the remains of a steam bath dating to approximately 900 BC, making it the oldest steam bath found to date in the Maya lowlands.</li> <li>• Human burials have been associated with the residential structures; the oldest have no surviving burial relics, but from 900 BC onwards, they were accompanied by offerings of ceramic vessels.</li> <li>• The site is closed to the public.</li> <li>• The site needs excavation and reconstruction.</li> </ul>	• Potential	• L
4. Maya Mestizo Dances		<ul style="list-style-type: none"> <li>• In Yo Creek there are many Groups that continue to practice the art of Maya Mestizo Dances of which some are Maya Nay Dance Group, Yo-SaYab Dance Group, and Masewal Dance Group.</li> <li>• In San Jose Nuevo Palmar there is Moh-Kich Pan Shaan Dance Group</li> <li>• In San Pablo there is the San Pablo Cultural Dance Group.</li> </ul>	• Actual	• M
5. Poktapok Maya Ball Game		<ul style="list-style-type: none"> <li>• Poktapok is a Maya ballgame, with ritual association played with a solid rubber ball weighing up to 8 pounds. Players play the game without using their hands. They strike the ball with their hips only. Points are</li> </ul>	• Actual	• M

Orange Assets	Walk	Description of Assets	Tourism Purpose	Tourism Readiness
		<p>scored by crossing the ball on the opponent's far end side of the court or by passing the ball on a hoop found about four feet above, in the middle of the court.</p> <p>Historically, prior to the game's commencement, there was a religious aspect to the game. Now, it is played for recreation in Yo Creek village, where the rebirth of Poktapok Maya ball game took place in 2015, or for the enjoyment of visitors.</p>		
6. Mestizo Cuisine		<ul style="list-style-type: none"> <li>Many restaurants and food stalls in town and villages offer this cuisine; however, only a few such as Mrs. Florencia Castillo offer a preparation presentation (such as Demonstration of cooking <i>Pibil</i> and <i>Pibtamales</i> under the ground) of how she prepares her traditional dishes and sweets utilizing the plants in her garden.</li> <li>Tacos Festival is an annual event in Orange Walk Town, as well as the annual Fiesta del Pueblo in San Lazaro and San Jose Nuevo Palmar, and other cultural events in the communities.</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>M</li> </ul>
7. Maya Cuisine		<ul style="list-style-type: none"> <li>Meals incorporate traditional ancestral foods.</li> <li>Corn, chocolate and guacamole heavily influence meals.</li> <li>Corn is a staple dish that is used to create tortillas and tamales. Mrs. Libertad Cal from Yo Creek does a complete Corn exhibition; demonstrating the process of making corn tortillas Maya style.</li> <li>Other types of Maya cuisine include Relleno, Escabeche, Mole, Chirmole, Rice and Beans, Cowfoot soup (Mondongo) and Cochinita pibil.</li> <li>For Dinner Garnaches, Salbutes, empanadas and Tostadas.</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>M</li> </ul>
8. Shipyard		<ul style="list-style-type: none"> <li>Founded in 1958 by Old Colony Mennonites from Chihuahua and Durango states in Mexico.</li> </ul>	<ul style="list-style-type: none"> <li>Potential</li> </ul>	<ul style="list-style-type: none"> <li>M</li> </ul>

<b>Orange Assets</b>	<b>Walk</b>	<b>Description of Assets</b>	<b>Tourism Purpose</b>	<b>Tourism Readiness</b>
		<ul style="list-style-type: none"> <li>• Consists of approximately 65 camps.</li> <li>• Most of the population of Shipyard are Plautdietsch speaking ethnic Mennonites, living in a very integrated community where most of them work as carpenters, farmers and mechanics. They have established a cheese factory.</li> <li>• Traditional in lifestyle, still using horse and buggy for transportation and tractors with steel wheels for fieldwork.</li> </ul>		
9. Cane Fields		<ul style="list-style-type: none"> <li>• Sugarcane growing and processing started in Belize more than 150 years ago. It is a traditional industry and a major contributor to Belize's GDP with annual earnings around USD\$50 million. The sector has approximately 5,300 registered farmers who produce 0.9 million to 1.2 million tons of sugarcane annually from approximately 74,000 acres.</li> </ul>	• Potential	• L
10. Orange Walk Town		<ul style="list-style-type: none"> <li>• Capital, the administrative and commercial center of the Orange Walk District.</li> <li>• Located on the western bank of the New River, 53 miles north of Belize City, 30 miles (50 km) south of Corozal Town, and 43 miles from Chetumal, Quintana Roo, Mexico.</li> <li>• Several monuments and historic buildings that include: the Marcos Canul Monument next to the Town Barracks; the World War 2 soldier in Independence Park; donated by the Belize Ex-service League OW Branch; the monolith at La Inmaculada Church; the trenches dug around fort Cairns in 1876 to protect the colonial town; Fort Mundy; La Inmaculada Church; the Anglican Church in its full colonial architecture; the magistrates building and police station, seat of the Colonial Powers</li> </ul>	• Potential	• M

<b>Orange Assets</b>	<b>Walk</b>	<b>Description of Assets</b>	<b>Tourism Purpose</b>	<b>Tourism Readiness</b>
		<p>facing the New River; the Tobacco drying sheds on the Chan Pine Ridge Road.</p> <ul style="list-style-type: none"> <li>• The police station in Orange Walk Town sits on top of a Maya Pyramid.</li> <li>• Sandy Hunter Library sits on land that was once the OW Town Hospital in the 1970's.</li> </ul>		
<b>Purpose Built Resources</b>				
1. Queen Elizabeth Park		<ul style="list-style-type: none"> <li>• Central Park is the registered name of the park and refers to its geographic location in the heart of Orange Walk Town. As the hub of activity in the downtown area, this is where public speeches, concerts, dances community fairs and National celebrations commence. The Park is adjacent to the Orange Town Hall.</li> </ul>	<ul style="list-style-type: none"> <li>• Potential</li> </ul>	<ul style="list-style-type: none"> <li>• M</li> </ul>
2. Yo Creek Cultural Center		<ul style="list-style-type: none"> <li>• A building housing the Center</li> <li>• Currently not utilized</li> <li>• Funding was provided through the efforts of Programme for Belize &amp; the Yo Creek Women's Group.</li> </ul>	<ul style="list-style-type: none"> <li>• Potential</li> </ul>	<ul style="list-style-type: none"> <li>• L</li> </ul>
3. San Lazaro Maya/Mestizo Museum		<ul style="list-style-type: none"> <li>• The Maya temple replica is located on the property of the Carrillo Family in San Lazaro.</li> <li>• The Family hosts the annual "Dia del Pueblo" in November at their home where the replica of a Maya Temple is showcased coupled with ceremonial presentations and traditional meals.</li> </ul>	<ul style="list-style-type: none"> <li>• Actual</li> </ul>	<ul style="list-style-type: none"> <li>• M</li> </ul>
4. Sugar Mill		<ul style="list-style-type: none"> <li>• Processing of sugarcane within the Belize Sugar Industry is done by the Belize Sugar Industries Limited (BSI), a subsidiary of American Sugar Refinery (ASR). The Mill currently has a capacity to grind 1.25 million</li> </ul>	<ul style="list-style-type: none"> <li>• Potential</li> </ul>	<ul style="list-style-type: none"> <li>• L</li> </ul>

Orange Assets	Walk	Description of Assets	Tourism Purpose	Tourism Readiness
		metric tons in 26 weeks or 290-320 tons per hour. The Mill purchases cane from farmers for the purpose of manufacturing into sugar, ethanol or any derivative of sugar cane in accordance with its license.		
5. Banquitas House of Culture		<ul style="list-style-type: none"> <li>Located on banks of New River in Orange Walk Town.</li> <li>A small museum that exhibits displays on the district's rich history, from ancient Maya ceramics and carvings found at Lamanai, to less ancient weapons and tools of the European mahogany cutters and Maya chicleros.</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>M</li> </ul>
6. Rum Distilleries		<ul style="list-style-type: none"> <li>Privately owned distilleries that include</li> <li>Old Master's Distillery (L&amp;R Liquors)</li> <li>Cuello's Distillery (Caribbean Rums)</li> </ul>	<ul style="list-style-type: none"> <li>Potential</li> </ul>	<ul style="list-style-type: none"> <li>L</li> </ul>
<b>Events</b>				
1. Annual Festivals		<ul style="list-style-type: none"> <li>Fiestarama with all the mechanical rides and business displays is hosted by the Town Council.</li> <li>BTIA Rum Festival – has not been done in two years</li> <li>Tacos Festival – is a collaboration between Universal Radio and Banquitas House of Culture NICH</li> <li>Annual OW Tourism Expo – hosted by BTIA</li> <li>Hero Day- is hosted by the Northern Mayan Association of Belize in the Month of September to celebrate Mayan Heroes</li> <li>A pre-lent celebration of the carnival with traditional dances to celebrate what is known as Juan Carnaval; it is hosted by the Banquitas House of Culture and the Northern Mayan Association in the month of February</li> </ul>	<ul style="list-style-type: none"> <li>Actual</li> </ul>	<ul style="list-style-type: none"> <li>M</li> </ul>

Orange Assets	Walk	Description of Assets	Tourism Purpose	Tourism Readiness
		<ul style="list-style-type: none"><li>• Lenten Saw Dust Tapestries/carpets are done yearly on Good Friday. The community units and prepares beautiful artistic carpets made out of pre-colored sawdust. The carpets will be walk on by the good Friday procession which is significant as it depicts the stations of the cross. This event is hosted by the Banquitas House of Culture.</li><li>• A celebration of the patron saint of San Jose Palmar with their hogs head dance.</li><li>• Forward Movement – is hosted by Mr. Omar Ayuso who resided in the US.</li><li>• San Jose San Pablo Culture Day- Hosted by the Village Chairman Mr. Javier Sabido.</li><li>• Cane farmers’ day.</li><li>• Garifuna Settlement Day Yurumein and Thanksgiving Mass is hosted yearly by the Orange Walk Garifuna Council and the Banquitas House of Culture. A reenactment of the arrival of the first Garifuna to Belize is done in the early morning by the Garifuna members as the paddle down the New River towards the Banquitas House of Culture, where they are greeted by spectators and community individuals who are there to celebrate their arrival. A joyful, cheerful march, including singing dancing and live drumming towards the La Inmaculada Church to take part in the celebration a Thanksgiving Mass. During the mass, many parts are celebrated in the Garifuna Language.</li><li>• Sugar Fest – organized by BSI-ASR</li><li>• All Saints Day prayers and homage to the dead.</li><li>• 24th May Orange Walk Day with horse races.</li><li>• New River Challenge (canoe race) – inactive.</li></ul>		

## **Appendix 3 – 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

<b>Name of Asset</b>	<b>Visitor &amp; Community Benefits</b>	<b>Governance/ Management Structure</b>	<b>Safety &amp; Security</b>	<b>Accessibility</b>	<b>TOTAL</b>
	( ) 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

<b>Area</b>	<b>Standards</b>	<b>Weight (points)</b>
<b>Visitor &amp; Community Benefits</b>	<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 eco-friendly 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>	<b>3.0</b>
<b>Governance/ Management Structure</b>	<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 genders. (1 point)</li> </ol>	<b>3.0</b>

Area	Standards	Weight (points)
<b>Safety &amp; Security</b>	<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>	<b>2.0</b>
<b>Accessibility</b>	<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>	<b>2.0</b>

## **Appendix 4 – Meeting Participants**

### **Initial Meeting – April 20th, 2018**

<b>NAME</b>	<b>ORGANIZATION</b>	<b>POSITION</b>	<b>CONTACTS</b>
Wilfrido Novelo	Maya Association of Northern Belize	Manager	633 2127
Vladimir Rodriguez	La Milpa Lodge	Manager	627 3272
Felicita Cantun	Ek Balan Poktapok	Manager	660 8853
Rosendo Urbina	Belize Tourism Board	Board Member	610 5350
Hugo Carillo	Festival del Pueblo	Founder	661 1980
Alexia Peralta	MTCA	Tourism Investment Officer	634 3862
Cindy Rivero	Banquitas (NICH)	Community Arts Coordinator	615 9574
Osmany Salas	Nahil Mayab Restaurant	General Manager	602 2535
Nellie Briceno	BTIA	Chair	667 7382
Abdiel Dominguez	BTIA	Tourism Information Officer	
Romel Mendez	Northern Medical Plaza		610 6010
Fernanda Tosta	BTB	DP Coordinator	624 8454
Luisa Rivas	D* Victoria Hotel	Manager	615 4652
Oscar Gutierrez	Cocina Sabor/BTIA	Business Owner	610 4435
Libertad Cal			652 5453
Marja Urbina	St. Christopher Hotel	Hotel Manager	623 1410

### **Focus Group – May 24<sup>th</sup>, 2018 - Culture**

<b>NAME</b>	<b>ORGANIZATION</b>	<b>POSITION</b>	<b>CONTACTS</b>
Felicita Cantun	EK Balam Poktapok	Manager	660 8853
Wilfredo Novelo	EK Balam Poktapok	Member	633 2127
Cindy Rivero	Banquitas HOC	Coordinator	615 9574
Florencia Castillo	Northern Maya Ass. of Belize	Assistant Treasurer	664 2280
Yahaira Vega	Banquitas HOC	Assistant	629 9390
Robert Usher	Youth Connection Band	Owner	600 5769

**Focus Group – May 24<sup>th</sup>, 2018 – Hoteliers/Restaurant**

NAME	ORGANIZATION	POSITION	CONTACTS
Marja Urbina	St. Christopher Hotel	Manager	623 1410
Maria Del Carmen	Hotel De La Fuente	Manager	610 1892
Osmany Salas	Nahil Mayab Restaurant	General Manager	602 2535
Lourdes Zaldiver	Tan's Pizza	Manager	322 2669
Randolph Zaldiver	Tan's Pizza	Manager	322 2669
Zenaida Cordova	Lucias Guest House	Reception	322 2244

**Focus Group – May 25<sup>th</sup>, 2018 – Tour Guides/Tour Operators**

NAME	ORGANIZATION	POSITION	CONTACTS
Herminio Novelo	Aventurmaya	Tour Guide	aventurmaya@gmail.com
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Jorge Estrella	Northern Tour Guide	Tour Guide	estrella53@hotmail.com
Manuel Novelo	Belize Maya Tours	Tour Guide	belizemayatours@yahoo.com

**Focus Group – May 25<sup>th</sup>, 2018 – Public Agencies**

NAME	ORGANIZATION	POSITION	CONTACTS
Dillon Jones	Media	Owner 88.5 fm	626 4882
Vladimir Rodriguez	Programme for Belize	Manager at La Milpa	627 3272
Nellie Briceno	BTIA Orange Walk	Chairperson	667 7382
Alexia Peralta	MTCA	Tourism Investment Officer	227 2801/634 3862

NAME	ORGANIZATION	POSITION	CONTACTS
Abdiel Dominguez	BTIA Orange Walk	Tourism Information Officer	661 3965
Rozel Flores	Orange Walk Town Council	Councillor	654 1193
Fabian Uk	Public Health	Public Health Inspector	660 9824
Edilberto Romero	Programme for Belize	Executive Director	626 7869

### Planning Session 1 – June 28<sup>th</sup>, 2018

NAME	ORGANIZATION	POSITION	CONTACTS
Alexia Peralta	MTCA	Tourism Investment Officer	634 3862
Yure Roberts	Belize Tourism Board	Manager (Destination Development)	635 6045
Danielle August	Belize Tourism Board	Destination Planning	605 4939
Rene Gomez	Nephi Belize Tours	Manager	610 5350
Vladimir Rodriguez	Programme for Belize	Manager	627 3272
Lourdes Zaldivar	Tans Pizza Restaurant	Manager/Partner	635 0867
Rozel Flores	OWTC	Councillor	654 1193
Felicita Cantun	EK' Balam Poktapok	Manager	660 8853
Herminio Novelo	Jungle River Tours	Manager	651 8730
Fabian Uk	Public Health	Public Health Inspector	660 9824
Ruben Lopez	D' Victoria Hotel	Front Desk	322 2518
Yahaira Vega	Banquitas HOC	Assistant Coordinator	629 9390
Cindey Rivero	Banquitas HOC	Coordinator	615 9574
Dillon Jones	Universal Radio	Business Owner	626 4882
Abdiel Dominguez	BTIA OW Chapter	BTIA Tourism Officer	661 3965
	St. Christopher Hotel	Hotel Manager	623 1410

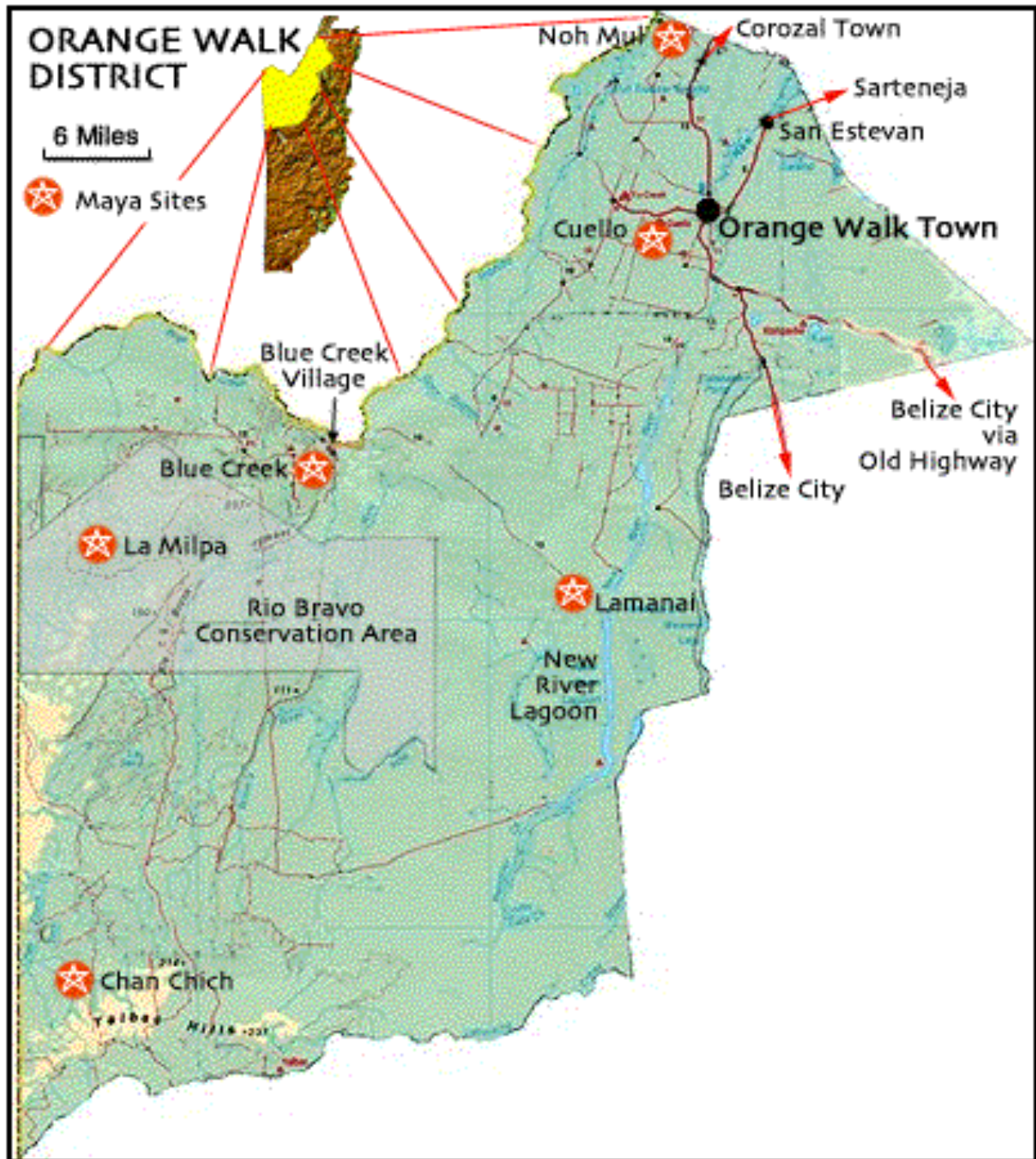
## Planning Session 2 – June 29<sup>th</sup>, 2018

NAME	ORGANIZATION	POSITION	CONTACTS
Fabian Uk	Public Health	Public Health Inspector	660 9824
Danielle August	Belize Tourism Board	Destination Planning	605 4939
Rene Gomez	Nephi Belize Tours	Manager	610 5350
Adriana Novelo	OWTC	Finance Officer	631 7666
Felicita Cantun	EK' Balam Poktapok	Manager	660 8853
Herminio Novelo	Jungle River Tours	Manager	651 8730
Luisa Rivas	D' Victoria Hotel	Front Desk	322 2518
Yahaira Vega	Banquitas HOC	Assistant Coordinator	629 9390
Cindey Rivero	Banquitas HOC	Coordinator	615 9574
Dillon Jones	Universal Radio	Business Owner	626 4882
Abdiel Dominguez	BTIA OW Chapter	BTIA Tourism Officer	661 3965
Jorge Estrella	NTGA	Councilor	626 3593
Alexia Peralta	MTCA	Tourism Investment Officer	634 3862
Yure Roberts	Belize Tourism Board	Manager Destination Planning	635 6945
Nellie Briceno	BTIA OW	Chairperson	667 7382

### Validation Session – October 29<sup>th</sup>, 2018

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Wilfredo Novelo	Maya Association of Northern Belize	<a href="mailto:novedris@yahoo.com">novedris@yahoo.com</a> /633 2127
Fabian Uk	Public Health Inspector	<a href="mailto:fabiboy_18@yahoo.com">fabiboy_18@yahoo.com</a>
Antonio Novelo	Tour Guide	<a href="mailto:novedris@yahoo.com">novedris@yahoo.com</a>
Marcos Corado	Tour Guide	<a href="mailto:coradom44@gmail.com">coradom44@gmail.com</a> /635 4741
Lance Pelayo	NTGA	<a href="mailto:lancepelayo@gmail.com">lancepelayo@gmail.com</a>
Adolfo Aragon	Tour Guide	<a href="mailto:tupsbz@gmail.com">tupsbz@gmail.com</a>
Marja Urbina	St. Christopher's Hotel	<a href="mailto:stchristophershotel@btl.net">stchristophershotel@btl.net</a>
Lourdes Saldivar	Tan's Pizza Restaurant	<a href="mailto:tanspizzaow@gmail.com">tanspizzaow@gmail.com</a> /635 0867
Herbert Eagan	NTGA	<a href="mailto:herbz_20@yahoo.com">herbz_20@yahoo.com</a> /632 7086
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## Appendix 5 – Map of Orange Walk 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		

#### 1. 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:**

## 2. KEY MILESTONES

	Milestone	Plan Completion Date	Status <sup>25</sup>	Actual Completion Date
1.				
2.				
3.				
4.				
5.				

## 3. ACTIVITIES AND PROGRESS

Planned Activities	Progress Made During Period
<b>Strategic Objective 1.1:</b> <i>(State the Strategic Objective)</i>	
Strategic Activity 1  <i>(State the strategic Activity)</i>	<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  <i>(Expand as needed)</i>	<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>25</sup> 1) Not Yet Started 2) Delayed 3) On-going 4) Completed

#### 4. LESSONS LEARNED

##### Lessons from executing the TDDP

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

## 5. RISKS, ISSUES, AND CHALLENGES

<b>Risk type</b>	<b>Risk Description</b>	<b>P<sup>26</sup> : 1 – 5 (1=low 5=high)</b>	<b>S<sup>27</sup> : 1 – 5 (1=low 5=high)</b>	<b>Risk Score (P+S)</b>	<b>Detail of action to be taken</b> (mitigation / reduction / transfer / acceptance)
Political					1.
Economic					
Social					2.
Technological					3.
Environmental					4.
Legal					5.

<sup>26</sup> Likelihood Of Risk Occurring

<sup>27</sup> Severity of Risk

## **6. NEXT STEPS**

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

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