



NATIONAL CRUISE TOURISM POLICY

**Annexes- Volume 2
May 2023**

Ministry of Tourism and Diaspora Relations
www.tourism.gov.bz

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NATIONAL CRUISE TOURISM POLICY 2023-2033

2033 VISION

“Enhance the quality of life for all Belizeans through a competitive, resilient, safe and sustainable cruise tourism sector that delivers world-class, modern, enjoyable, unique and authentic visitor experiences.”

In order to effectuate this vision, the National Cruise Tourism Policy adapts seven (7) Thematic Policy Areas under which specific policy guidelines and recommendations are proposed. These Policy Areas are:

**DEMOCRATIC
GOVERNANCE**

**SOCIAL
EQUITY**

**CULTURAL
INTEGRITY**

**ENVIRONMENTAL
STEWARDSHIP**

**ECONOMIC
OPTIMIZATION**

**PRODUCT
DEVELOPMENT**

**RESILIENCE
BUILDING**

ANNEX 1 - STAKEHOLDER CONSULTATION LISTING

Name of Stakeholder	Persons Consulted	Date of Consultation	Mode of Consultation
Regional/International Associations			
Florida-Caribbean Cruise Association	Adam Ceserano, President	July 20th, 2022	Zoom Call
Cruise Line Companies			
Carnival Corporation (Carnival Cruise Lines)	Luis Terife, Vice President of Shore Excursions Erika Tache, Sr. Director, Product Development, Marketing and Operations Charlene Drake, Assistant to VP for Government Relations.	August 19th, 2022	Zoom Call
Viking Cruises	Nicolai Skogland, Senior Port Operations Manager Tatiana Sakhapova, Shores Excursions Manager.	July 20th, 2022	Zoom Call
Silversea Cruises	Catherine Morales, Manager of Destination Experiences	July 20th, 2022	Zoom Call
Royal Caribbean	Mario Egues, Manager, Destination Manager Crystal Campbell, Destination Projects	July 21st, 2022	Zoom Call
Norwegian Cruise Lines	Jose Negron, Vice President, Private Island Development Juan Kuryla, Senior Vice President- Port Development & Construction	July 7th, 2022	One-on-One Meeting (Belize Tourism Board)
Local Governments			
Belize City Council	Stephanne Garbutt-Lindo, City Administrator Melecia McDougall, Local Economic Development Officer	August 23, 2022	In Person- One-on-One (City Hall)
Placencia Village Council	Warren Garbutt, Chairman Conrad Villanueva, Councilor	August 10th, 2022	In Person- One-on-One
Independence Village Council	Clifton Garbutt, Chairman	August 10th, 2022	In Person- One-on-One

ANNEX 1 - STAKEHOLDER CONSULTATION LISTING

Name of Stakeholder	Persons Consulted	Date of Consultation	Mode of Consultation
Shipping Agents			
Caribbean Shipping Agency	Mr. Stanley Longworth, CEO	Throughout	Cruise Working Group and Consultation Workshop
APEX Shipping Agency	Ms. Mirna Lara, CEO	July 22, 2022	Consultation Workshop
Tour Operators			
Indigenous & Rainforest Tours	Laurencio Bul, Owner	July 22, 2022	Consultation Workshop
A Plus Adventures	Albert Alvarez, Owner		
S&R Tours	Rosalynd Danderson & Shellon Olivera, Owner		
Thompson Tours	Joseph Thompson, Owner		
Duce's Best Belize Tours	Joseph Duce, Owner		
Olmec Eco Tours	Jimmy Robinson, Owner		
Irvin Belizean Adventure Tours	Irvin Longworth, Owner		
Big John's Tour & Taxi Transfer	John Pollard, Owner		
Belize Sensational Tours	Adrian Reneau Sr., Owner		
Exotic Shore Excursions	Thomas Tillet, Owner	July 22, 2022	Consultation Workshop
Belize Horse & Carriage	Shyeam & Jerrold Jenkins, Owner		
Wonders of the Barrier Reef	Matthew Castillo, Owner	Throughout	Consultation Workshop and Cruise Working Group

ANNEX 1 - STAKEHOLDER CONSULTATION LISTING

Name of Stakeholder	Persons Consulted	Date of Consultation	Mode of Consultation
Tour Operators			
The Calypso Train Tours	Denise Ockey, Owner	Throughout	Consultation Workshop and Cruise Working Group
Chukka	Idorine Vernon, Manager Maria Echevarría, Representative Lorraine Jex, Representative	July 22, 2022	Consultation Workshop
Belize Exotic Adventures limited	Nickoli Alvarado, Owner	Throughout	Consultation Workshop and Cruise Working Group
Cave – Tubing .com	Yhony Rosado, Owner Jimmy Cortez, Plus 1, Representative	Throughout	Consultation Workshop and Cruise Working Group
Jose Tours	Jose Golib, Owner	July 22, 2022	Consultation Workshop and Cruise Working Group
Lamanai Belize Tours	Frankilino Avila, Owner		
Private Belize Tours	Dorian Rivero, Owner		
Coral Breeze Adventure Tours	Estrellita Chan, Owner	July 22, 2022	Consultation Workshop
Tender Operators			
Belize Sea Charters	Matthew Castillo, CEO	Throughout	Cruise Working Group and Consultation Workshop
Caribbean Shipping	Stanley Longworth, CEO/Owner	Throughout	Cruise Working Group and Consultation Workshop

ANNEX 1 - STAKEHOLDER CONSULTATION LISTING

Name of Stakeholder	Persons Consulted	Date of Consultation	Mode of Consultation
Port Managers and Developers			
FSTV	Ms. Noriko Gamero, Deputy General Manager	Throughout	Cruise Working Group and Consultation Workshop
Harvest Caye	Bryan Umpleby, Island Director	July 22, 2022	Consultation Workshop
	Jose Negron, VP of Private Island Operations	Throughout	Cruise Working Group
Port Coral	Troy Gabb, Project Manager	July 22, 2022	Consultation Workshop
Port Magjical	David Gegg, Principal	July 22, 2022	Consultation Workshop
Civil Sector			
Belize Audubon Society	Ms. Alma Urbina	July 22, 2022	Consultation Workshop
Belize Network of NGOs	Ms. Alyssa Noble, Representative	Throughout	Cruise Working Group
National Government and Agencies			
Public Health Department	John Bodden, Principal Public Health Inspector	August 8th, 2022	Zoom Call
Customs and Excise Department	Estella Requena, Comptroller Arnaldo Ho, Unknown Emelda Cocom, Assistant Comptroller Dr. Gilbert Gordon, Deputy Comptroller	August 8th, 2022	Zoom Call
Ministry of Investment and Economic Development	Lincoln Blake, Director of Investment	July 22, 2022	Consultation Workshop
Ministry of the Blue Economy and Civil Aviation	Ms. Emilie Gomez, Representative	Throughout	Cruise Working Group

ANNEX 1 - STAKEHOLDER CONSULTATION LISTING

Name of Stakeholder	Persons Consulted	Date of Consultation	Mode of Consultation
National Government and Agencies			
Ministry of Sustainable Development, Climate Change and Disaster Risk Management	Mr. Kenrick Gordon, Representative	Throughout	Cruise Working Group
Ministry of Tourism and Diaspora Relations	Mrs. Nicole Solano, CEO	Throughout	Consultation Workshop and Meetings
	Mr. Raymond Mossiah, Chief Tourism Officer	Throughout	Cruise Working Group
Belize Tourism Board	Mr. Evan Tillett, Director of Tourism	Throughout	Consultation Workshop and Meetings
National Institute of Culture and History	Ms. Marilyn Young, President Ms. Melissa Badillo, Director of Archaeology Mr. George Thompson, Parks Manager	July 22, 2022	Consultation Workshop, and Cruise Working Group
Belize Ports Authority	Michael Jenkins, Operations Manager	July 22, 2022	Consultation Workshop
	Mjr. Gilbert Swaso, Ports Commissioner	Throughout	Cruise Working Group
Tourism Police Unit	Inspector Rash	July 22, 2022	Consultation Workshop
Local Tourism and Business Associations			
Belize Chamber of Commerce	Ms. Katherine Meighan, VP of Services	July 22, 2022	Consultation Workshop
Belize Tourism Industry Association	Ms. Renae Martinez, Representative	July 22, 2022	Consultation Workshop
	Ms. Denise Ockey, Representative	Throughout	Cruise Working Group
BLAST	Nikoli Alvarado	Throughout	Cruise Working Group and Consultation Workshop
National Tour Guide Association	Edmond Williams, President, Denise Cassanova, Representative Douglas Breakman, Representative	July 22, 2022	Consultation Workshop
Individual Business Owner in FGZ	Raul Pelayo	July 22, 2022	Consultation Workshop

ANNEX 2

POLICY CONTEXT



A. Overview and General Trends in Cruise Tourism in Belize

a. Pivotal Moments of Growth

The current Cruise Tourism Policy for Belize was developed to address unprecedented growth in cruise tourism arrivals in Belize in the early 2000s. Since then, Belize has seen a remarkable 264% growth rate in cruise tourism between the years 2000–2021. Within this time period, there have been three significant boom events in the performance of cruise tourism in Belize. The first was in the early 2000s, with Belize establishing itself as a new destination in the Western Caribbean itinerary, which saw a growth of 1200% within a span of six years. This, was by far the most considerable growth in cruise in Belize, and sparked the need for rapid development of infrastructure and services to sustain the explosion in demand from this sector. One of the main development factors for this period was the post-9/11 impacts to travel in the eastern world, creating great demand for the Western Caribbean itinerary. Another peak and growth in demand, occurred in early 2010s, despite challenges such as the Ebola outbreak and rise in threat of terrorism. However, the outstanding economic recovery from the 2008 recession was also seen as the catalyst for growth in this decade. Overall, the 2010s was an important period for cruising in the world, as cruise tourism became a viable and competitive travel option for the main tourism source markets around the world. This growth in demand saw Belize pass for the first time hit the 1 million passenger mark in 2016, and showed a promising trajectory prior to 2020; where Belize was poised to have achieved the NSTMP’s 2030 projections earlier than scheduled. Nonetheless, the COVID-19 Pandemic realized a dramatic decline in cruise passenger arrivals due to the lockdowns in both Belize and key source markets. Today, the industry is in the process of recovery, with some indication of a return to pre-pandemic growth patterns expected for 2022.

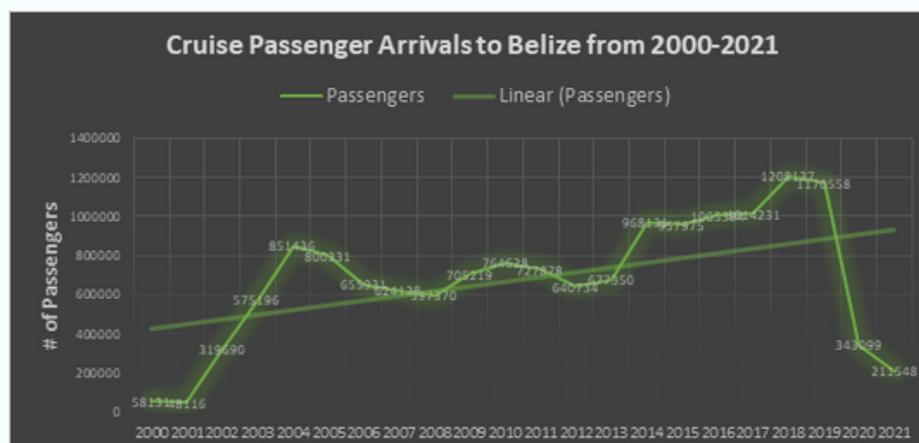


Figure 1- Cruise Passenger Arrivals to Belize from 2000–2021 (Source: Belize Tourism Board)

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POLICY CONTEXT



b. Segmentation of Cruise

Belize's cruise tourism product initially started with small expedition-based cruising (scuba-diving) that would call to Belize City in the 1990s. However, as Cruise tourism has evolved, it quickly saw a change in the demand dynamics with larger, more conventional ships dominating the annual schedule of calls. Currently, Belize hosts all the major Cruise lines that cater to Mexico and the Caribbean, with the principal lines being:

- Carnival
- Royal Caribbean
- Norwegian Cruise Lines
- Princess

Objective

These four cruise lines and their various brands in 2019 represented 91% of the demand to Belize with most ships catering to over 2000 passengers. Recently, with the new modern class ships being brought into the region, ship capacities of over 4000 passengers are being frequented. Belize, however, has hosted a plethora of other cruise lines such as the following, to name a few:

- MSC
- AIDA Cruises
- TUI Cruises

In addition, being a premier nature-based destination, Belize has continued to attract smaller expedition style cruises, and now with trending luxury cruise lines increasing in demand. As a result, Belize also caters to these smaller-sized ("Boutique") cruise vessels, with lines such as:

- Ponant
- Silversea
- World Voyager
- Fred Olsen
- Regent Seven Seas
- Viking
- Seabourn

These vessels primarily cater to approximately 250-1000 guests, averaging around 550 guest capacities per ship.

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c. Demand and Expenditure Summary

Belize is included within what is considered the Western Caribbean itinerary for cruise lines in the Caribbean. It is also considered predominantly a shore excursion/tour destination, unlike other ports along its route that have a mix of shopping and tours. It receives cruise ships primarily from Florida and from Houston, with the majority of passengers being of American nationality, followed by UK residents and Canadians, the three accounting for 98% of visitors to Belize. The average age of cruisers to Belize were found to be between 49 years – 65 years old, with an average household income of about \$120,400 (USD), according to the most recent BREA Study (2018). The BREA Study (2018) noted that cruise passenger parties visiting Belize spent approximately US\$168.23 per visit, with the average cruise party being 2.16 passengers.

Of the goods and services demanded by cruise visitors to Belize, the majority of the expenditure were concentrated in four categories:

- Shore Excursions
- Food and Beverage
- Watches and Jewelry
- Clothing



Figure 2–Western Caribbean Itinerary (Source: Princess Cruises)

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POLICY CONTEXT



Along the same route, Belize shares the itinerary primarily with Mexico (Cozumel, and Costa Maya), and Honduras (Roatan). There are also cruise itineraries that include Belize that visit the Cayman Islands, and Jamaica.

Overall, cruise tourism is estimated to generate approximately \$86.1 million (USD) in tourism expenditure in Belize. Of note, is that crew member spending is also a key component of the expenditure formula for Belize. The 2018 BREA study found that crew members spent on average US\$46.17 while in Belize. These expenditures by crew were primarily on Food and Beverage.

The 2018 BREA study estimated that Cruise tourism in Belize generates approximately 2,500 jobs or US\$27.7 million in wage income. This employment is predominantly within the commercial services sector, including tour services areas, retail and hospitality sectors.

d. Visitor Satisfaction and Supply Characteristics

Where it relates to visitor satisfaction, Belize, in the last BREA study scored an overall visitor satisfaction rating of 7.9, with the guided tours segment ranking the highest in terms of satisfaction at an 8.6 rating. The latter was primarily accountable to the knowledge, professionalism and quality of tour guides the destination offers.

	Belize	Mexico (Costa Maya)	Mexico (Cozumel)	Honduras	Cayman Island	Jamaica
Overall Satisfaction Rating	7.9	6.7	8.5	8.2	8.1	7.1
Highest Satisfaction Rating	8.6 (Guided Tour)	7.8 (Guided Tour)	9.2 (Guided Tour)	8.7 (Guided Tour)	8.7 (Guided Tour)	8.4 (Guided Tour)
Lowest Satisfaction Rating	5.3 (Likelihood of Return Visit)	3.7 (Likelihood of Return Visit)	6.4 (Likelihood of Return Visit)	5.8 (Likelihood of Return Visit)	5.8 (Likelihood of Return Visit)	4.3 (Likelihood of Return visit)

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POLICY CONTEXT



In comparison with ports in the region, Belize has room for growth and improvement especially in areas such as:

- Variety of things to do in the Destination
- Overall Shopping Experience (variety of shops and pricing)
- Shore side welcome

As it is a tender port, this may be creating a level of dissatisfaction amongst visitors, with the added logistics to come onshore.

Objective

As a major tour destination, Belize's main attractions include historical and cultural sites, urban history tours, and marine ("soft water") tours. In 2022, 58 % of cruisers in central Belize that went on shore excursions visited an Archaeological Site (mostly Altun Ha, Nohoch Che'en, Xunantunich and Lamanai). Additionally, the main tour activities done by cruisers in Belize, accounting for 82% of tours, are:

- Cave Tubing
- Mayan Temple Visit
- City Tours

Other less frequented tour activities include:

- Swimming
- Snorkeling
- Airboat Ride
- Wildlife Watching
- Zip-line
- Country Tour
- Rum Tasting

B. Cruise Tourism Resources and Challenges Profile

The tourism value chain for Cruise tourism in Belize is divided into two geographical regions, the Central region (Belize City FSTV port) and the Southern Region (Harvest Caye port). There is also the smaller, expedition- and luxury-style cruises that also utilize other areas of Belize, primarily the southern offshore islands and southern Belize. The following is a brief breakdown of their respective value chain profile.

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Value Chain Component	Central Belize Coast (Belize City)	Southern Region (Harvest Caye)	Other Southern Regions
A. Cruise Terminal and Ports	One Port Facility Active (Fort Street Tourism Village), with shopping and shore excursion opportunities.	One Private Port Facility with shopping and recreation opportunities, as well as shore excursions.	Smaller Cruise Lines tender into Punta Gorda Town for shore excursions or anchor within offshore islands.
B. Distribution Channels	One Current Distribution Channel, being the Fort Street Tourism Village	Two current distribution channels, one via the Malacate facilities, and a second via Placencia.	No formal distribution channel. Currently Punta Gorda Town serving as a landing spot for the Toledo region.
C. Cruise Lines	Major Lines- Carnival, Royal Caribbean, Princess, Holland America, Silverseas, MSC, Celebrity, Viking Cruises, GTS, Seabourn, AIDA, Mein Schiff, Marella, Seven Seas, Ponant, etc.	Norwegian Cruise Line, Regent Seven Seas	Smaller and Luxury Ships, such as Ponant
D. Ground Transportation	Available via Contracted Tour Operators, Pre-Booked Tour Operators, and Independent Tour Operators	Available via Contracted Tour Operator	Must be pre-arranged with local tour operator, via shipping agent, primarily.
E. Service Providers	Retail Stores, Artisans, Hair-braiders, Tour Guides, Tour Operators, Street Vendors, Food and Beverage Providers, Medical Practitioners, Attraction Managers	Retail Stores, Artisans, Tour Guides, Tour Operators, Food and Beverage Providers, Attraction Managers	Artisans, Tour Guides, Tour Operators, Food and Beverage Providers, Attraction Managers
F. Attractions and Shore Excursions	-Cave-Tubing, Ziplining and Rapelling -Mayan Archaeology (Altun Ha, Lamanai, Xunantunich)	-Mayan Archaeology (Nim Li Punit) -Living Maya Experience (Cacao Farm) -Spice Farm Tour	-Mayan Archaeology (Nim Li Punit, Lubaantun)

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Value Chain Component	Central Belize Coast (Belize City)	Southern Region (Harvest Caye)	Other Southern Regions
F. Cont'd Attractions and Shore Excursions	-City Tour and Museum -Snorkeling and Scuba Diving -Sun and Beach -Water Recreation and Sports -Adventure (ATV) -Airboat	-River Tubing -Snorkeling -Sun and Beach -Water Recreation and Sports	-Cultural Experiences -Agri-tourism Experiences
G. Local Communities and Heritage	Belize City, Belize Rural, Frank's Eddy Village, Orange Walk, Cayo District	Placencia, Independence, Monkey River, Rural Toledo	Punta Gorda, and Rural Toledo
H. Vendors and Service Providers	Tourism Village, Tourism Zone with Vendors, Hair-braiders and Tour Operators, Most attractions with small scale gift shop vendors	Retail stores on the island, some vendors at Archaeological Sites, some retail activity at living experience attractions.	Some retail activity, via vendors at archaeological sites and at living experience attraction.
I. Primary Employment Contribution	Belize City, Belize District, Western Belize	Toledo District, Stann Creek District	Toledo District, Stann Creek District
J. Direct Fiscal Contribution	Head Tax GST Business Tax Trade License Social Security Contributions Port and Related Fees	Passenger Fee GST Business Tax Social Security Contributions Port and Related Fees	GST Business Tax Social Security Contributions Port and Related Fees

ANNEX 3

POLICY FRAMEWORK



A. The Policy Hierarchy

The development of cruise tourism in Belize is guided by three levels of governance and developmental guidelines, stemming from the global obligations that Belize as a United Nations member has to promote and steward sustainable development, and actualized by the sector-specific policies that are relevant to cruise tourism in Belize. As a result, the below figure summarizes the findings of the literature review and consultation process, that establishes a policy concept framework for this policy document:

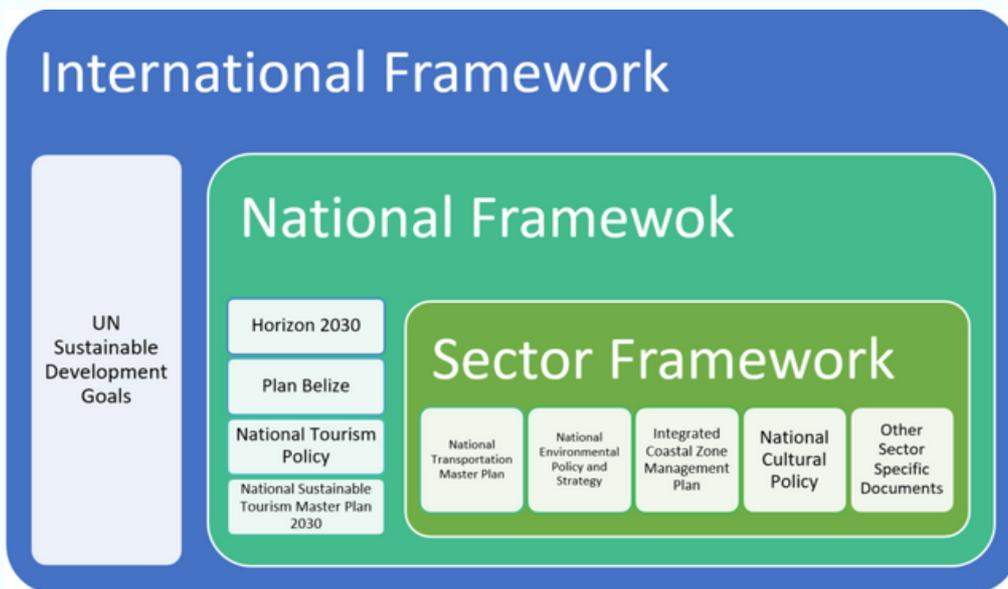


Figure 3: Concept Diagram of Policy Framework

a. The International Framework

Sustainable Development Goals

The cruising sector lends naturally to the achievement of the United Nations Sustainable Development Goals (SDGs). In particular, the following are the main goals that are relevant to cruise tourism:

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POLICY FRAMEWORK



Figure 4- United Nation's Sustainable Development Goals

- No Poverty- through the creation of jobs, business opportunities and economic activity in developing economies.
- Gender Equality- in providing employment and economic opportunities for all genders.
- Decent Work and Economic Growth- through its economic impact and multiplier effect in the local economy.
- Industry, Innovation and Infrastructure- through its promotion of new infrastructure and technology in ports.
- Climate Action- via the recent establishment commitment to reduce emissions and to transition to LNG energy sources for the newer ships.
- Life below water- through responsible environmental practices that safeguard and promote the conservation of marine ecology.
- Life on land- through responsible environmental practices that safeguard and promote the conservation of terrestrial ecology.
- Partnership for the Goals- a commitment for sustainable development that stems from cruise lines, to regional bodies, to national governments and to individual businesses and tourism employees.

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As will be seen, at the national level the policy framework follows wholesomely the Sustainable Development principles established by the SDGs, as a result, this policy document will seek to reiterate Belize's commitment to sustainable tourism development.

b. National Framework

Horizon 2030

Horizon 2030 establishes a long term vision for Belize, which states that by 2030:

"Belize is a country of peace and tranquility, where citizens live in harmony with the natural environment and enjoy a high quality of life. Belizeans are an energetic, resourceful and independent people looking after their own development in a sustainable way."

In broad strokes the inferences for the cruise sector derived from Horizon 2030 is that any economic activity must promote:

- Harmony and Balance with the Natural Environment- This includes that the natural environment is valued and protected as a basis for economic activity.
- Promote Quality of Life for Belizeans- this includes both in urban and rural areas through opportunities for productive enterprise, competitive and fair business, and well-balanced distribution of wealth and resources.
- Align to Sustainable Development- This includes using democratic leadership, fair and accountable management frameworks, with a firm balance of economic, social and environmental priorities.

In addition, cruise tourism in Belize also aligns with strategies #1, #3, and #4 of the Horizon 2030 strategic pillars:

- Strategic Pillar 1- Democratic Governance- This is specifically in relation to the need to ensure the effective management of public resources, including public attractions, protected areas, cultural heritage and natural landscapes.
- Strategic Pillar 3- Economic Resilience- Horizon 2030 specifically calls for a sustainable and profitable tourism sector. It also promotes the need for strong small business sector, a strong workforce and strong network of entrepreneurs. In addition, Horizon 2030 calls for timely and smart investments.

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POLICY FRAMEWORK



Plan Belize and Economic Development Plan

PlanBelize serves as the foundation for the next medium-term economic development plan for Belize. There are also a few foundational principles that must be considered in developing this policy document:

- **Stimulate the Economy** beyond Recovery in a post-COVID Era- In doing so, PlanBelize calls for:
 - Fast-tracking of private sector investments and development projects.
 - Fostering Entrepreneurship and enabling Sustainable Job Creation.
 - Establishing public-private investment partnerships.
- **Harnessing the Green and Blue Economies**- PlanBelize seeks to strengthen Belize's food security and integration with the tourism sector.
 - In particular, it recommends the alignment of the food supply chains with the demands of the tourism sectors, including demands from the cruise sector.
- **Culture as Liberation**- It also promotes the need for cultural expression, conservation and development. In relation to Cruise Tourism, this would include:
 - Establishment of a Museum of Natural History to serve as a tourism attraction.
 - Enhanced and new archaeological parks to be developed in Toledo, Cayo, Corozal, and Orange Walk Districts.
 - Provide opportunities for Annual Belize Arts Fairs and market access to cultural entrepreneurs.
- **Meaningful Engagement and Empowerment of Belizean Women**- With relation to Cruise Tourism, PlanBelize also seeks the promotion of:
 - Creation of economic opportunities for women, ensuring gender quality and equity.
- **Empowering Rural Villages**- PlanBelize also focus substantially on the development of rural economies. With relation to the Cruise Tourism Sector, the following is notable:
 - Ensure rural infrastructure is developed and maintained properly. This is key, as many of the access roads to key tourism attractions are within the rural areas.
 - Proper drainage and water management systems in rural areas. Similarly, having proper drains in rural areas can assist in building the destination's resilience to the impacts of climate change.

ANNEX 3

POLICY FRAMEWORK



- **Making Belize ready for the World-** PlanBelize has substantial recommendations for tourism development in Belize. Key areas to consider under this Cruise Tourism Policy are:
 - Tourism Infrastructure Projects- A call for \$150 million investments in tourism related infrastructure projects within the first five years.
 - Facilitate the building of new cruise port facilities.
 - Enhance and develop the Belize brand.
 - Promote a Buy Belize Campaign, encouraging the purchasing of Belizean products and services by the tourism sector.
 - Incentives to modernize the tourism transport fleet, including renewable energy technology.
 - National Tourism Resilience Plan to address impacts of climate change and pandemics.
 - Ensure that all major tourism destinations have adequate electricity supply.
 - Building of a national aquarium as a key tourism attraction.
 - Building a new Bliss Lighthouse with an observation deck.
 - Designate tourism investment zones, ensuring planned development and access to utilities.

National Tourism Policy 2017

Therefore, as the most direct concept framework for this policy document, linkages and correlation with the current National Tourism Policy is vital. The National Tourism Policy was updated in 2017. In it, the vision for tourism established in the National Sustainable Tourism Master Plan was embraced. As a result, this policy will serve as the main guiding policy framework for the Cruise Tourism Policy. Its time scope extends to 2028, and like the previous policy documents, it aligns with the United Nations 2030 Agenda for Sustainable Development and the Sustainable Development Goals.

As a result, the shared Vision for Tourism for Belize to 2028 is a tourism sector that seeks:

“Enhancing the quality of life of all Belizeans through a competitive and sustainable tourism sector that delivers enjoyable, unique and authentic visitor experiences.”

ANNEX 3

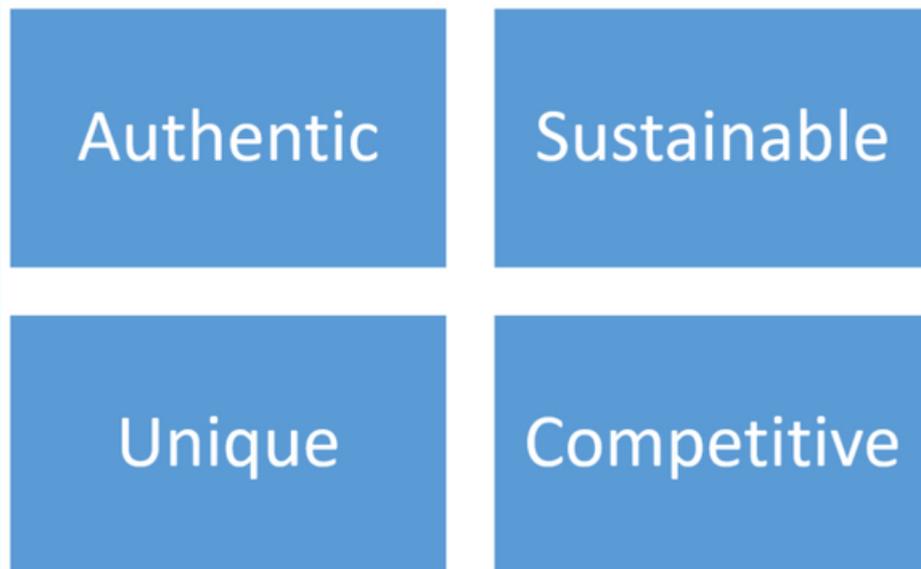
POLICY FRAMEWORK



This aligns with the National Sustainable Tourism Master Plan's Vision:

"Belize is an exclusive multi-cultural sustainable destination in the Central American Caribbean. It is a destination where the authenticity and friendliness of people, coupled with the uniqueness of an exotic natural environment can be actively experienced within a conserved world."

It further establishes the following strategic guiding principles for tourism in Belize:



This is undoubtedly a guiding framework that the Cruise Tourism Policy should embrace. To further qualify this guiding framework, the NTP and NSTMP embrace four broad objectives:

- **Optimization**- Optimize socio-economic benefits from tourism.
- **Sustainability**- Undertake a sustainable and planned tourism development.
- **Competitiveness**- Achieve competitiveness as a world-class destination.
- **Leadership**- Support Belizean stakeholders in taking leadership over sustainable tourism development.

Furthermore, the National Tourism Policy aims at achieving six key policy objectives:

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POLICY FRAMEWORK



NTP's Policy Objectives	Description
<p><i>Marketing and Market Access</i></p>	<p>To enhance market knowledge and focus, improve the reach and effectiveness of promotional activity and strengthen market access to and within Belize. To achieve this, the notable policy guidelines linked to the Cruise sector are:</p> <ul style="list-style-type: none"> • Maintain a clear brand position, with Belize embracing its core values (Sustainable, Authentic, Unique and Competitive) • Improve physical access to attractions, via strategic dissemination of information, robust road signage programs, and collaboration with regional entities, such as the FCCA. • Improve marketing intelligence, access to performance information, and visitor satisfaction data for decision-making by all stakeholders. • Improve the commercial transport fleet inventory of the country, especially tour buses and vans.
<p><i>Product Development, Management and Conservation</i></p>	<p>To develop, enhance and maintain a diversified product offer that celebrates and protects Belize's key natural and cultural heritage assets and expands the country's market interest and appeal. With relation to Cruise tourism, the following are key guidelines in the NTP:</p> <ul style="list-style-type: none"> • Cultural Heritage <ul style="list-style-type: none"> ○ Highlight Belize's cultural heritage throughout the tourism product, and promote local benefits from cultural tourism. ○ Ensure that visitors respect cultural traditions and avoid damaging the integrity of such. ○ Improve visitor experience and appreciate of heritage sites through creative and innovative interpretation. ○ Improvement of access to cultural heritage sites and attractions. ○ Promote the conservation of Belize's cultural heritage assets. ○ Seek opportunities for economic diversification of cultural heritage assets, through models such as concessions, philanthropy and more competitive user fees. ○ Increase access of quality and diversified locally-made artisanal products for sale at sites. ○ Broaden visitor experience of local culture, with links to other sectors such as agriculture, gastronomy, and industry. ○ Develop themed cultural trails and adequate visitor facilities. ○ Provide specialized tour guiding skills to local guides. • Natural Heritage

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NTP's Policy Objectives	Description
<p><i>Product Development, Management and Conservation</i></p>	<ul style="list-style-type: none"> ○ Collaborate with management agencies to provide visitors with a memorable experience, while at the same time highlighting Belize's conservation DNA. ○ Prioritizing and rationalizing the provision of access of protected areas for tourism purposes, including establishing proper carrying capacity and visitor management models. ○ Seek opportunities for economic diversification of natural heritage assets, through models such as concessions, philanthropy and more competitive user fees. ○ Support good quality and responsible investments in infrastructure, trails, signage, visitor facilities, interpretation, equipment, tour activities, as well as concepts of ecotourism and adventure centres and routes. This should include considering public-private partnerships for concessions within protected areas that would enhance the visitor experience. ○ Work with local agricultural producers to cater to the demand for local goods by cruise ships. <ul style="list-style-type: none"> ● Cruise Tourism <ul style="list-style-type: none"> ○ The NTP established a more integrated approach to the consideration of cruise tourism in Belize. Instead of being a conflicting subsector with overnight, the NTP encourages creating synergies between both. ○ The NTP also emphasized the need to ensure that there are appropriate levels of visitation by cruise tourists in Belize to minimize the impact on environment and society. ○ Ensure proper market intelligence and performance data is available for the cruise sector in Belize. ○ Ensure planned growth for cruise tourism arrivals, along with establishing identified limits. This includes maintaining a maximum limit on the number of cruise ship passenger arrivals onshore per day. ○ Optimization of revenue and passenger expenditure from Cruise tourism. ○ Establishing quality reception and berthing infrastructure in Belize City, as per the NSTMP. ○ Encourage locally owned businesses and facilities that cater for cruise passengers. ○ Strive for cruise passenger conversion to overnight tourists. ○ Establish standard operating procedures and quality-based guidelines for tour services that are offered to cruise passengers.

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NTP's Policy Objectives	Description
<p><i>Product Development, Management and Conservation</i></p>	<ul style="list-style-type: none"> ○ Set mandatory requirements for cruise ships operating in Belizean waters, including environmental management and docking procedures, with regular monitoring. ○ Seek to attract high value and specialist cruise markets and provide appropriate facilities and services for them, including pocket cruises. • Sun and Beach <ul style="list-style-type: none"> ○ Establish standards for beach management, including water quality and waste management measures. ○ Support the provision of practical and attractive visitor infrastructure on waterfront and beaches. ○ Minimize beach and shoreline erosion and other impacts of climate change. • Leisure and Entertainment <ul style="list-style-type: none"> ○ Support the development of a small number of integrated leisure and entertainment areas, including in areas accessible by cruise.
<p><i>The Quality and Safety of the Visitor Experience</i></p>	<p>To improve the quality of the visitor experience in Belize, ensuring that it is consistent, safe, enjoyable and reliable. In doing so, the NTP recommends the following policies that align with the operations of the Cruise sector:</p> <ul style="list-style-type: none"> • Ensure Quality and Safety of Facilities and Services <ul style="list-style-type: none"> ○ Establishing minimum standards that cover safety and security. ○ Increase enforcement standards and improve better monitoring of non-compliances. ○ Embrace capacity development as a major pillar in the improvement of tourism standards in Belize. • Visitor Security and Community Relations <ul style="list-style-type: none"> ○ Increase tourism security and enforcement efforts by the Tourism Police Unit. ○ Commit to the ECPAT Code and take measures to combat sex tourism and human trafficking. ○ Establish and maintain a disaster and crisis management.
<p><i>Investment, Enterprise, Skills and Employment</i></p>	<p>To stimulate investment in the tourism sector, support small businesses and improve skills training and career opportunities for all Belizeans. With relation to the Cruise Tourism Policy, the following are key areas to consider:</p> <ul style="list-style-type: none"> • Promote Investment Opportunities in tourism in Belize, including a transparent and efficient process for investment mobilization. <ul style="list-style-type: none"> ○ Support investments by existing businesses and operations to expand and improve offer. This is especially so for MSMEs. ○ Offer financial incentives, through tax reductions, grants or credit, for cruise tourism investments.

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NTP's Policy Objectives	Description
<i>Investment, Enterprise, Skills and Employment</i>	<ul style="list-style-type: none"> ● Capacity Building and Career Development <ul style="list-style-type: none"> ○ Prioritize and safeguard employment opportunities and careers for local Belizeans. ○ Develop training opportunities across the tourism value chain, including specialized tour guide skills that are accessible and affordable. ○ Develop language skills in all jobs in the sector.
Destination Planning and Environmental Management	<p>To strengthen the planning, development and management of local tourism destinations and the response of the sector to Climate Change and other environmental challenges. With regard to Cruise tourism, the following are notable:</p> <ul style="list-style-type: none"> ● Local Destinations and their Management <ul style="list-style-type: none"> ○ Develop local destination plans, inclusive of investments for infrastructural improvements, utilities, transportation, and destination-level disaster preparedness plans. ● Physical Planning and Development Control <ul style="list-style-type: none"> ○ Invoke the use of proper land use planning approaches, such as zonation in tourism development. ● Environmental Management and Climate Change <ul style="list-style-type: none"> ○ Need to strategically transition to low carbon development and strengthening resilience to the impacts of Climate Change. ○ Pursue mitigation measures including improving energy efficiency and the use of renewables in the tourism sector. ○ Ensure that Climate Change risks are factored into development planning, site selection, coastal setbacks and building designs. ○ Put in place effective shoreline and coastal protection and management regimes. ○ Diversify the tourism offer towards types of tourism and locations that are less susceptible to Climate Change. ○ Install appropriate infrastructure and measures to adapt to Climate Change. ○ Promote the reduction and ban of the use of plastics, Styrofoam and other harmful substances.
<i>Tourism Governance and delivery of the policy</i>	<p>To strengthen stakeholder engagement in tourism governance at both a national and local level, improve coordination, accountability and transparency and ensure effective delivery of the policy. Under the scope of this Cruise Tourism Policy, of note is the following:</p> <ul style="list-style-type: none"> ● To ensure that a system of governance and management is put in place that is inclusive, participatory and representative of the sector.

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National Sustainable Tourism Master Plan 2030 (NSTMP)

Beyond the development approach re-iterated in the NTP 2017, the NSTMP provides direct recommendations for the future development of cruise tourism in Belize. As a result, the following are key guiding recommendations from the NSTMP to be considered:

Firstly, the NSTMP called for Belize to consider two typologies of cruise tourism:

- *Conventional Cruise*- There are the traditional type of cruise lines that cater for over 850 passengers. Interestingly, the NSTMP noted that the limit for this type of cruising was 3000 passengers, a limit that is surpassed now with the new modern class of ships that are catering for over 4000 passengers.
- *Pocket Cruise*- The NSTMP envisioned the need to also focus on smaller cruise ships that cater up to 300 passengers, and provide a more luxury and personalized experience. While the idea of pocket cruising is seeing an up-trend, the sizes of these vessels are between the 500-1000 passenger mark.

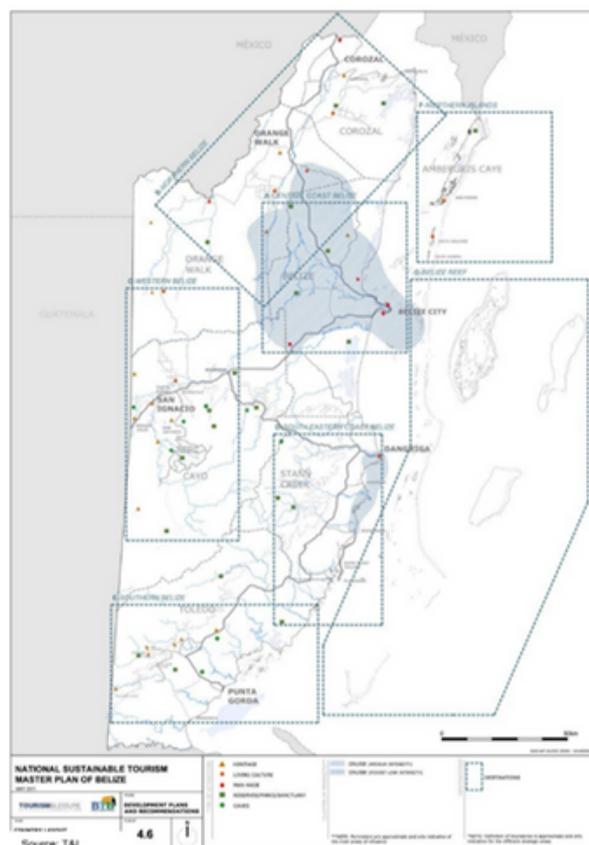


Figure 5- Tourism Zones (Cruise Hubs) as per the NSTMP 2030

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Furthermore, the NSTMP recommended that by 2030, Belize would have developed two cruise hubs, being in Belize City and in the southeastern coast of Belize, complemented with services, attractions and entertainment facilities. One of the cruise hubs would have been in Belize City, with two terminals, namely the Fort Street Tourism Village, and the second was to be a cruise development in the Port Loyola area of Belize City. The second hub would have been in the southeastern coast of Belize, near Riversdale, primarily for pocket cruises. It is clear that to date, this vision has not fully materialized with the addition of a conventional cruise private port island destination at Harvest Caye.

The NSTMP also recommended that Northern Belize (Orange Walk and Corozal) also focus on developing cruise tourism attractions, services and infrastructure to take advantage of the growth of cruise in the central part of Belize. In addition to this, the NSTMP recommended the established of a Destination Management Committee to serve as the main negotiator with cruise companies to enhance the benefits of cruise tourism in Belize.

These recommendations were to achieve the following 2030 objectives:

- To attract new markets and market segments through the diversification of Belize's cruise tourism product.
- Enhance visitor satisfaction by improving the cruise tourism destinations, accessibility to existing and new destinations, to equitably distribute cruise tourists across the country and avoid over-crowding.
- To enhance the satisfaction level at both local and foreign levels with safety measures, tourism services and product offered.
- To increase local participation in tourism economic activity and reduce poverty by using cruise tourism as a pro-poor tourism tool.

In order to achieve these the NSTMP establishes the following sub-programs and projects:

- ***Belize City Main Cruise Hub Development***– Urbanization of Belize City, inclusive of a tourism information center, development of a Belize City Waterfront Experience, pedestrian experience in Belize City, and restoration of the Belize River to utilize it as an experience.

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- ***New Development north of Riversdale for Pocket Cruise Development***- This would include a market and feasibility study, a business model development, environmental studies, and requisite legal instruments for it to operationalize. These steps have not been completed by the government of Belize.
- ***Belize Destination Management Committee***- This has not materialized.
- ***Development of Port Loyola Cruise Village Area***- Includes the construction of a terminal building and complete logistics hub for cruise tourism. Currently, this project is in the pipeline, along with other cruise port options in pipeline.
- ***Ships and boats accessibility for Cruise Tourism***- This is inclusive of anchorage sites for cruise lines, in particular the pocket cruisers and excursion vessels.
- ***Land Infrastructure for Cruise Tourism***- Inclusive of urban development in Belize City, signage, and pedestrian-friendly areas. This also includes improvement of access roads to key tourism attractions such as Altun Ha, Crooked Tree, and other Archaeological Sites in Belize.
- ***Basic services consolidation***- Included functioning garbage collection, waste treatment plants, provision of sufficient potable water and telecommunication and banking services to cruise passengers.
- ***Belize Cruise Tourism Brands***- development of an umbrella brand for marketing purposes for the Cruise sector, inclusive of promotion, communication and public relations activities, such as fam- trips, special marketing campaigns, a specific cruise tourism website for Belize, a conversion campaign for cruisers, and participation at cruise tourism fairs (eg. Seatrade, Cruise 360, etc.)
- ***Operational guidelines and standards for Cruise Tourism***- Establishment of code of conduct and best practices manual for service providers in the cruise sector. This also includes safety guidelines for tour operations, safe tendering operations, maintain compliance with ISPS code.
- ***Safety and security for Cruise tourism***- Development of a risk management plan for cruise tourism, and emergency response plans. Also includes police patrols in and outside the cruise terminal, and development of specific law to facilitate enforcement.
- ***Continuous training for cruise tourism services on land***- includes assessment and provision of training for cruise tourism providers, MSME management training, hospitality trainings and support for local artists. This also includes seafarers basic training, and training for support services for boat logistics.
- ***Cruise tourism area use plan***- This entails establishing and mapping specific channels and maritime routes for vessels, specific anchorage sites, special areas for shopping and recreations.

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- **Cruise tourism asset management and conservation-** developing an inventory of cruise tourism assets, establish specifically sensitive areas and guidelines for use of the areas, as well as the development of a Visitor Management Plan and Crowd Control Plan for each destination that cruisers use.
- **Cruise tourism inclusion mechanism-** promoting opportunities for cruise lines and passengers to support community uplifting initiatives in the destinations.

The NSTMP projects a linear growth rate of 3.7% up to 2030, with approximately 1.5 million passengers being received annually.

Current Cruise Tourism Policy

The current Cruise Tourism Policy was developed in the early 2000s, and at that time set Belize as one of the first cruise destinations to have established a specific policy for cruise tourism development. At the time of development, however, cruise tourism was not a mainstream sector in Belize, as was found with the severely under-projected growth numbers established in the Blackstone Report (Belize's first tourism strategy). In this regard, the following are the main takeaways from this policy that remain relevant and should serve as a basis for this updated Cruise Tourism Policy for Belize:

- **Main objective-** was to ensure that cruise tourism became competitive with other destinations and contribute to the attainment of the general tourism development objectives in Belize.
- **Specific objectives-**
 - To increase the number of cruise ship calls and passenger arrivals in a sustainable manner.
 - To optimize the revenue's generated from cruise passenger expenditure's and ensure equitable distribution of economic benefits to all stakeholders.
 - To increase overall benefits from cruise tourism by creating inter-sectoral linkages, where cruise lines source needed supplies and goods from Belize.
 - To expand the absorptive capacity of the country by developing new attractions, and properly manage the stress factors of already established sites.
 - To explore other ports and suitable anchoring sites.
 - To develop effective conversion campaigns to convert cruise passengers to long stay visitors.
 - To improve the quality of visitor experience in Belize.
 - To improve the level of security of visitors.

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- **Main concerns**- in developing the first policy the following were the main concerns considered:
 - Anchoring of Cruise vessels
 - Off-ship recreational activities for cruise passengers
 - Operation and maintenance activities on board vessels
 - Waste management and disposal
 - Cumulative impacts of ships operating in Belize

As can be appreciated by these priority areas, Belize in the first iteration of a national cruise policy saw itself focusing on building a product, an experience and gaining interest to build arrival performance. Today, the fruits of this early work is apparent, and this policy document should build upon this success legacy for the next 10 years.

In the current cruise policy, there were significant policy recommendations that were pronounced; some, which are still very relevant in today's context. As a result, below is a brief listing of these still relevant guidelines:

- **Shore Excursion**- All cruises lines are to provide shore excursion activities to guests.
- **Carrying Capacity**- Belize would allow to disembark in Belize City no more than 3000 passengers on one day. Currently, this number has increased to 12,000 passengers per day.
- **A Cruise Tourism Advisory Committee** would have been established to support consultation and coordination with local private sector, government and cruise lines.
- **Tourism Security**- the Tourism Police Unit would be deployed in strategic locations in Belize City, including the Fort Area, Albert Street, Regent Street, Queen Street, North Front Street and the Princess Area.
- **Tour Management**- The policy included recommendations for:
 - Dispersion of tours to various sites and locations.
 - Central parking location in Belize city for tour buses and taxis.
 - Adequate information supplied about sites and attractions.
 - Prevention of overcrowding.
 - Tours should include stops in towns and villages en-route to attractions to support local economic development.
- **Emergency Precautions**- Indicated that all the local agencies in Belize would coordinate in the event of an emergency.
- **Entertainment**- Cruise visitors should be offered various cultural, social and historically-linked entertainment options.

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- **Cruise ship operators**– were required to:
 - Suspend all forms of entertainment activities on board, while in port.
 - Promote overnight stays and multiple destination visits.
 - Avoid the creation of monopolies, locally.
 - Prepare and present an emergency action plan.
 - Encourage the creation of unique local activities that will enrich visitor experience.
 - Cruise ships allowed to anchor only at sites designated by the Belize Port Authority.
- **Environmental Compliance**– all Cruise lines were to sign an Environmental Compliance Plan, covering all aspects of the cruise sector value chain.

Revised Carrying Capacity

In 2019, the Belize Tourism Board commissioned the development of a Carrying Capacity Assessment and Development Plan for Belize Cruise Ship Ports. This assessment focused primarily on operating ports and terminals (namely the Fort Street Tourism Village and Harvest Caye) at the time of the study, however, established significant recommendations for the overall development of Cruise tourism in Belize, as follows:

- Currently, the carrying capacity limits for FSTV stands at 12,000 passengers per day, and at Harvest Caye is at 5000 passengers per day or a 400,000 a year limit with an expansion to 500,000 per annum. It was found that there have been instances where cruise call schedules have challenged these limits.
- However, it also denotes the limitation that exists in the visitor flow chain for Belize, with a primary bottleneck remaining due to tendering requirements in Belize City, and the lack of adequate berthing facilities countrywide.
- The study was based on a comprehensive methodology to assess the current capacity limitations and opportunities. As a result, the following impacts/bottlenecks/gaps were indicated:
 - Potential bottlenecks exist at FSTV, especially as it relates to tendering, bathroom usage and tours.
 - Socio-economic benefits from cruise tourism for locals was found to be in decline, with increased competition, and mixed messages being provided to cruise passengers.
 - Need for modernized fleet of tour buses and vehicles.

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- Need for better product and offer in Belize City, to promote pedestrian tours.
- Potential for overburdened tourism attractions is a concern.
- Solid waste and marine life pollution continues to be a concern.
- There is the potential for over-crowding of nearby communities, such as Placencia and Independence, that could lead to issues with traffic management, issues with access to proper visitor facilities such as restroom.

Based on full consideration of the above, of the current and future infrastructure and products, and on industry trends such as visitor motivations and vessels' increasing passenger capacities, the following two scenarios were recommended by the study. These would serve as the foundation upon which a future growth path for cruise tourism in Belize would be established. While the below provides an optimal carrying capacity scenario, these are based on substantial milestones and investments such as adequate berthing facilities in Belize City, additional berthing facilities in Harvest Caye, improvements in visitor facilities, transportation and attractions.

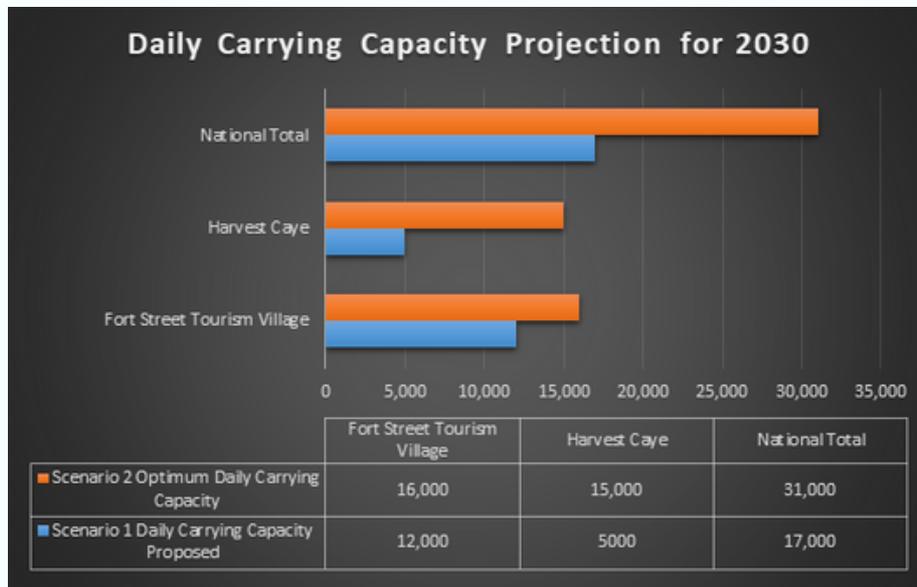


Figure 6- Daily Carrying Capacity Projections 2030 (Source: BTB's Cruise Carrying Capacity Assessment and Development Plan for Belize Cruise Ports, 2020)

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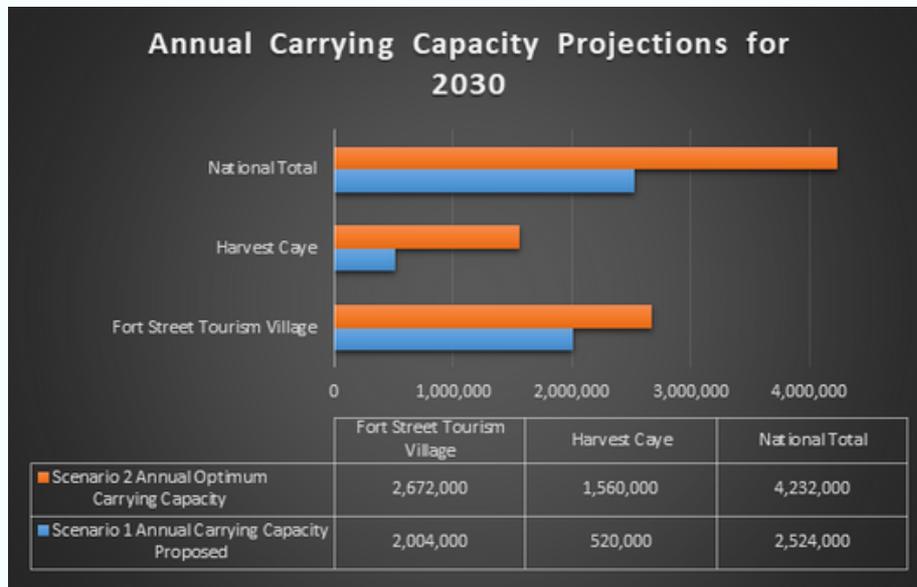


Figure 7- Carrying Capacity Projections 2030 (Source: BTB's Annual Cruise Carrying Capacity Assessment and Development Plan for Belize Cruise Ports, 2020)

As a result, a pragmatic approach of a milestone of 2.5 million should be considered due to market constraints such as:

- Supply limitations faced at regional ports that share the itinerary with Belize, and that Belize depends on.
- Need for berthing facilities to receive modern class ships.
- Additional tender vessels may be required, with a shift to larger tender vessels in ports that tendering is feasible.
- To meet optimum capacities, additional and more modern tour bus assets are required.
- Need for cultural and entertainment events to retain passengers in port.
- Need to identify and open new recreational products in Belize City and in rural areas.
- Proper parking and rotation systems for tour buses and vehicles in Belize City.

In addition to the above, the following table summarizes additional framework documents and guidelines utilized to develop the updated cruise tourism policy.

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Document	Recommendations
Tourism Recovery Strategy	<p>In 2021, the Belize Tourism Board developed a recovery strategy to support the re-opening of the tourism economy in Belize. Within this strategy the restart of cruise tourism was contemplated, with the following recommendations:</p> <ul style="list-style-type: none"> • Development of Health and Safety Protocols for Cruise Operations in Belize. • Readiness of the Cruise sector to receive cruise tourism. • Lobbying for cruise restart of sailing. <p>It is clear that all these major milestones have been met and exceeded expectations, with a restart to cruising in July 2021. Currently, most of the stringent health and safety protocols have been discontinued and cruise tourism now operates close to a pre-pandemic modus operandi. That being said, health and safety will be a mainstay development factor for Cruise tourism for the foreseeable future.</p>
National Transport Master Plan (NTMP)	<p>The NTMP establishes a priority road infrastructure improvement plan which includes the maintenance of primary roads and development of secondary and tertiary roads. Of these, the most elemental recommendation is the paving of the Coastal Road, which will open a new corridor to cruise tourism for tourism attractions along that road and in southern Belize. Similarly, this would provide an additional area for shore excursions from the Harvest Caye Port if attractions are developed. Nonetheless, the primary recommendations of the NTMP concerning Cruise tourism is the recommendation for a docking facility for cruise ships in Belize City. As a result, the following are key takeaways:</p> <ul style="list-style-type: none"> • The NTMP recommends the need for a cruise port terminal in Belize City, as tendering is becoming logistically unsustainable. • The NTMP recommends improving the accessibility to tourist attractions, both established and new. • The NTMP provides an adjusted projection of annual arrivals for 2030 at an estimated 1.6 million passengers, still short of the optimum levels projected by the Carrying Capacity carried out by the BTB.
National Cultural Policy	<p>The National Cultural Policy 2016-2026 seeks to forge and nurture the Belizean identity through the safeguarding of our cultural heritage, cultural education, prioritization of cultural within national development agendas, innovation, youth development, building cultural relations, and the adequate financing and administration of cultural assets in Belize. With relation to cruise tourism, the following are key recommendations:</p> <ul style="list-style-type: none"> • Encourage the development of programs which are oriented toward Belize’s cultural heritage and ensure that more space is made available within tourist activities. This is specifically for the entertainment and music industry. • Integrate living cultural heritage into the activities of enhancing the preservation, promotion and management of archaeological sites.

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Document	Recommendations
National Cultural Policy	<ul style="list-style-type: none"> • Establish a system to upgrade and maintain access roads to major tourist destinations. • Embrace the development of Public-Private Partnerships in the cultural and creative industries, including incubator programs for MSMEs. • Support the development of a Belize Cultural Tourism Brand, including establishing an Enchanted Belizean Villages network. • Establish a National Museum of Belize, and a network of private museums, houses of culture, art galleries and cultural spaces to serve as a main platform for cultural tourism offer. • Support cultural-based regeneration of urban environments involving youth.
National Environmental Policy and Strategy	<p>This 2014 policy document promotes the sustainable use of resources in order to achieve a green, clean, resilient and strong environmental stewardship. This policy integrates a plethora of environmental strategies and plan such as the National Protected Areas System Plan, the Solid Waste Management Plan, and the National Forest Policy to name a few. With regard to the Cruise Tourism Policy, some of the main highlights are:</p> <ul style="list-style-type: none"> • The policy seeks to prevent degradation of terrestrial and marine resources, sustainable land management, and integrated water resource management. • It also promotes improvement to waste management systems, liquid waste management, and reduction of pollution (air and marine). • Lastly, it also focuses on building Belize’s resilience to Climate Change at its impacts, through proper disaster risk reduction programs, mitigation and adaptation initiatives.
Belize Integrated Coastal Zone Management Plan	<p>The Integrated Coastal Zone Management Plan is a comprehensive document that consolidates major policy-based and strategic priorities for coastal zone development. It focuses on specific areas that must be considered in the development of a Cruise Policy for Belize, primarily the following:</p> <ul style="list-style-type: none"> • Encouraging sustainable coastal resource uses, including: <ul style="list-style-type: none"> ○ Protected Areas Management- Belize has 14 marine protected areas, and the Plan calls for sustainable use of the resources provided by these areas, including equal access to all, and responsible development of economic opportunities within the protected areas. ○ Mangrove Protection- including mangrove restoration, and conservation. ○ Coastal Habitat & Species Conservation-includes preserve critical nesting sites and foraging areas, decrease development activities near fragile ecosystems, and building awareness. • Supporting integrated development planning

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Document	Recommendations
Belize Integrated Coastal Zone Management Plan	<ul style="list-style-type: none"> ○ Marine Traffic- includes establishing and marine transportation policy, with proper hydrographic maps and navigational charts. ○ Marine Pollution Control- promote public awareness of marine pollution vulnerabilities. ○ Marine Tourism and Recreation- support the NSTMP recommendation noted above. ○ Marine Dredging- Develop a national marine dredging policy, and highly monitor dredging activities to minimize impacts of dredging on coastal ecology. ● Adapting to Climate Change <ul style="list-style-type: none"> ○ That tourism carries out vulnerability studies along the coastline, and prepare adaptation options. ○ Support renewable energy production, energy efficiency and waste disposal projects in tourism.

As can be appreciated by the above, there are key thematic areas that are supported by the existing policy framework at all levels. Primarily, these thematic areas align well with the sustainable development model, further substantiating the alignment between this updated document and the current National Sustainable Tourism Master Plan 2030, and its future iterations, as well as the National Tourism Policy 2017. Broad Thematic Areas that can be inferred at this point are:



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The following is a brief of the macro-competitive factors for Belize. This was developed by a series of consultations carried out between July and August 2022 with industry stakeholders in and outside of Belize, as well as discussed by the Cruise Tourism Working Group established for the update of the National Cruise Tourism Policy.

Strengths

Belize is a **marquee tour destination** in the highly demanded Western Caribbean Itinerary. Its proximity to the U.S. home ports, and to nearby cruise ports in Mexico and Honduras, creates an undeniable competitive advantage.

Belize Tour Guides and Tours are ranked high compared to other visitor satisfaction rating.

The Belizean Experience is a major attractor. This is due to its agglomerated natural and social assets, a stable economy (pegged to the US Dollar), safe and secure political climate, and an English-speaking nation.

Belize has unchartered areas for smaller expedition based cruises or luxury cruises can visit, such as Offshore Islands, and Southern Belize.

Currently fees for vessel clearances, etc. are done by each agency, individually. This creates an onerous process for vessels in Belize.

Belize just completed a Bathymetric study of our waters with assistance from the UK, therefore, information exists to support navigational aid.

A much **stronger collaborative environment amongst local agencies and with foreign cruise companies** has been nurtured coming out of the COVID-19 lockdown.

Head taxes are low compared to regional averages.

Belize Tourism Board's most recent carrying capacity indicates **that Belize has great potential for expansion of cruise arrivals.**

The expansion however must be **cognizant of triggers that are required for the ports to be able to accommodate the growth.** In particular, the need for berthing facilities, modernization of bus fleets, visitor facilities (eg. Restrooms) expansion, etc.

Belize government enjoys a healthy and good relationship with cruise lines coming out of COVID-19.

Both ports are **embracing renewable and efficient energy technology in their operations.** For instance, Belize City will be introducing electric public buses for local residents, and Harvest Caye is retrofitting their water vessels with electric motors

The country's **system for scheduling calls is effective.** Cruise Lines seek destinations that can provide predictability for a period of 1-3 years.

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Weakness

Belize City as a port destination is not administered as such by the Municipal Government. Therefore, **Cruise Tourism from a planning and development point is not seen as a key priority.**

Belize's current Cruise **port capacity is severely limited** in the Belize District due to tendering requirements. Cruise lines are seeking **ports with berthing facility**. This in turn reduces the time available for tours and visit to Belize sites and attractions.

Severe transportation issues in Belize City, due to lack of parking areas for buses.

Transitioning to berthing facilities in Belize will leave a substantial gap in the tendering industry that represents a major contributor to taxes and employment.

Cruise **Port Developments require a standardize approach at analyzing and vetting** for **feasibility** including impacts on current operation and cumulative impacts.

All Belize's Cruise ports are privately owned.

Proper Dredging Plans for the Cruise Sector is not existent.

Additionally, the country **lacks a master plan for commercial (Cargo and Passenger) port development** across its coastline, which takes advantage of local and regional competitive advantages.

Three current port projects in Belize City continue to face challenges in receiving complete buy-in from government and cruise companies.

Country has **no dry-docking facilities** to service tenders, much less for cruise lines.

Security monitoring of guests are not done comprehensively upon entry to ports, and therefore the Customs Department is unaware of what goods the cruise visitors are bring off the ship.

Clearance of Vessels (Free Practique) is still done manually and not in unison. There is still a historical challenge with full coordination and collaboration between relevant local authorities involved in cruise tourism oversight and regulation.

In addition, cruise lines seek a fee structure that is simplified and clear. This is not the case for Belize.

No system or platform exists for Public Health to provide and be provided health advisories, other than the current manifest

Based on the BREA study findings, **Product and Tour Diversity is lacking. In particular, it is missing a Living Culture Experience Product, such as culinary experiences, and tours that require physical activities (kayaking, hiking, Biking, etc.)**

City Tour and Pedestrian activities in Belize City is also lacking, leading to small rates of foot traffic into the City.

Weak public health surveillance systems at cruise ports.

Consider more support for **Training of tour guides and frontline workers** is needed to elevate the standards. Particular interest in **Guest Services, Storytelling, and Safety Training** is required. Training in second languages is not available.

Poor Service Culture in the cruise sector in Belize.

Lack of Incentives for tour guides and frontline personnel to **excel at service.**

Tour Operators also require more training opportunities to improve business acumen.

Emergency Planning and Infrastructure for Emergency Management (Fire and Oil Spill, Vehicular and Vessel Accidents) is lacking. For example, there should be EMT services at every site and attraction.

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Weakness

Navigational Aids, Maps and Buoys Infrastructure require further strengthening to support smaller luxury cruises in southern Belize, for example.

Even though Belize is a tour destination, **the tour take rates have considerable room for improvement.**

Tours in Belize, currently are not required to stop in communities to provide for further economic benefit.

Waste Management in Destination is an area requiring continuous improvement.

Site Management and Carrying Capacities at Sites and Attractions need improvement. Many sites are not being managed comprehensively as tourism attractions, and personnel are not adequately trained. There is need for standards of operations at attractions, etc.

No zonation of cruise tourism areas in the country.

Previous Policy Implementation and Monitoring was weak.

Quality Standards of Tour Operators requires strengthening. This includes an old bus fleet that requires modernization.

Marketing of Belize as a Cruise Destination is weak.

Local awareness of the value of the cruise sector is also very weak.

Access Infrastructure to Sites and Attractions need constant maintenance, especially where it relates to road infrastructure and visitor facilities. Poor Accessibility to Sites and Attractions for persons of diverse abilities.

Revenue collected by Sites and Attractions, Municipalities and Agencies may not be fully re-invested in maintenance and product development.

Cost of Finance for Local Tour and Cruise Service Operators is high.

Legislative Framework for Cruise is weak in Belize. There are various legislative instruments governing the sector, and critical loopholes that do not protect local companies from foreign leakage.

Policy on Casino Operations and opening of Duty Free stores onboard while in Belizean waters is not clear and standardized.

Legislation for treatment of Ship Stores in Belize is not conducive to promote Belize as a homeport or turnaround destination.

Low supply of Tour Guides being experienced

Fair wages and compensation needs strengthening.

Low available of economic performance data available for the cruise sector.

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Opportunities

Staffing and Recruitment within the Cruise Sector for Belizeans

Smaller Luxury and Expedition Cruises are trending globally. They seek off the beaten track destination with little to no infrastructure. Some of the smaller cruise lines are also seeking homeporting or turnaround services in destinations like Belize.

Live-aboards and Yachting is a major industry as well, and any planning of Cruising should consider any synergies or conflicts with these industries. Especially so with the emergency of smaller cruises.

The trends for Port Development, Ownership and Management have shifted to a much more public-private approach, with governments having some stake in the development.

Cruise lines are continuously looking at ports where they can restock supplies.

Crew Members are also an important consumer of goods and services in a destination. As a result, products, tours and services demanded by the Crew should be considered.

Industry is moving towards a **Sustainability Model Approach.** More technological-based systems, including in waste management, energy, and water management. This also includes booking of guests and tours.

Cruise Lines are **moving towards LNG technology and reduction of emissions,** and will require on- shore connection to reduce energy needs during docking. This new energy strategy will now see **ships move slower and less,** meaning that number of calls will be reduced, and so higher competition.

Additionally, cruise lines are also seeking tourism products that showcase sustainability in destinations. (eg. Sustainable Farming Products). This is especially the case for smaller cruise lines.

Cruise Lines are projected a **return back to 100% Capacity by 2023.**

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Opportunities

As a result, Cruise Lines are indicating that *higher demands for tour guides* is apparent.

Cruise lines are *seeking Shipyard services* for dry-docking of vessels

Opportunities for *Climate financing* to advance initiatives.

War in Ukraine, and increasing security tensions in Europe may be beneficial to the Caribbean.

Cruise lines note that Guest Satisfaction ratings are around 8.0 of 10, as a result, there is much room *for improvement, especially in terms of berthing facilities, tour diversity and retail diversity.*

Business Development- Cruise lines such as Carnival Cruises are open to develop *business incubator programs to support the development of TOs* and product in the destination.

Cruise lines are also indicating that an uptrend is expected in cruises including *overnight stays in ports* that can accommodate it.

Visitor trends with Cruise lines are showing *growing demand for authentic experiences and for cultural heritage.*

ANNEX 4

SWOT ANALYSIS



Threats

The local governments do not seek to establish an over-dominance of cruise tourism within their communities, as this can lead to *negative gentrification and displacement*.

Belize, shares similar product offering and visitor satisfaction rating with all other ports along the itinerary. *Competitiveness is negatively stagnant*.

Natural Disaster Threats

Fuel Price increase and volatility impacts the economic gain from cruise tourism.

Future pandemics or health emergencies that may impact operations.

Cruise lines are noting an increase in demand for *Sightseeing and Sun and Beach Activities*

Cruise Tourism is a vertically integrated economic model. There is need to establish further safeguards in Belize to close loopholes and maximize the benefits for locals. How?

Crime and Violence threaten the viability and attractiveness of Belize as a Cruise Destination, and its ability to enjoy the socio-economic benefits of the sector.

Threat of Fires, Oil-Spills or other environmental nuisance that can gravely impact the environment.

Cruise tourism is by nature a *volatile industry*, with no set-in-stone schedule or calls existent.

Foreign-owned companies are using local tour operators as a legal mask for operating in the sector in Belize. This creates *economic leakage*.

ANNEX 5

MONITORING AND EVALUATION TEMPLATE



Note this template is to be completed during the Action Planning Phase of the Policy:

Policy Area	Policy Recommendation	Expected Outcome	Implementation Period (20--)										Responsible Agency	Review and Monitoring Period	
			2023	2024	2025	2026	2027	2028	2029	2030	2031	2032			
Democratic Governance	1.1 (Cruise Tourism Development Committee)...														
Social Equity	2.1 (Fair and Competitive Employment)...														
Environmental Stewardship	4.1 (Monitoring of Environmental Impacts of Cruise Tourism)...														
Economic Optimization	5.1 (Cruise Tourism Zones)...														
Product Development	6.1 (Product Development Strategy)...														
Resilience Building	7.1 (Disaster and Emergency Planning)...														



For more information:

info@tourism.gov.bz
106 South Street, Belize City, Belize
www.tourism.gov.bz

