



ANNUAL TECHNICAL REPORT
2021

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Message from the Minister

The resiliency of the tourism industry was tested when travel came to a complete halt during the coronavirus pandemic. The Belizean people were able to show resilience in the face of this enormous adversity. Local and foreign investors who drive tourism displayed their unwavering commitment to recovery and reset. This was also true of the public sector and teams at the Ministry of Tourism and Diaspora Relations and the line agencies, the Belize Tourism Board and the Border Management Agency. The team persevered and were productive despite work from home, blended (face-to-face/virtual) meetings, and challenging commutes, among other challenges. In my capacity as Minister, I am proud to lead this industry and this team of dedicated individuals. We continue to focus on Marketing, Product Development, Quality Assurance, Training, Aviation Development, Infrastructure Development, Policy and Planning, and Good Governance. True to #planBelize, we have delivered on our Recovery Plan, opening growth opportunities for the future of tourism in Belize.

Hon. Anthony Mahler
Minister of Tourism and Diaspora Relations

Message from the Chief Executive Officer

The Ministry of Tourism and Diaspora Relations has worked closely with other government agencies and the wider private sector to restore the tourism industry after COVID-19. This could not have been possible without the team effort at the Ministry of Tourism and Diaspora Relations, the Belize Tourism Board and the Border Management Agency. Through a collective vision, under the leadership of Hon. Anthony Mahler, Minister of Tourism and Diaspora Relations, we have been able to chart the way forward in these challenging times. This team has delivered on our local and international commitments, joined regional and international discussions with a view toward regional and global integration, and placed Belize firmly in the spotlight. I applaud the relentless efforts of the tourism team in ensuring that our overnight and cruise sectors have bounced back to near pre-pandemic levels this year.

Nicole Ellen Solano,
Chief Executive Officer
Ministry of Tourism and Diaspora Relations

List of Abbreviations

ADC	Airlift Development Committee
APAMO	Association of Protected Areas Management Organizations
ATM	Actun Tunichil Mucnal
BAHA	Belize Agriculture and Health Authority
BTB	Belize Tourism Board
BMA	Border Management Agency
BPD	Belize Police Department
DRIP	Belizean Diaspora Returnee Incentive Program
CTO	Caribbean Tourism Organization
DRU	Diaspora Relations Unit
FDI	Foreign Direct Investment
GoB	Government of Belize
HCMR	Hol Chan Marine Reserve
KPI	Key Performance Indicators
MOU	Memorandum of Understanding
MFEDI	Ministry of Finance, Economic Development and Investment
MHW	Ministry of Health and Wellness
MTDR	Ministry of Tourism and Diaspora Relations
MMO	Mundo Maya Organization
NCCO	National Climate Change Office
NEAP	National Environmental Action Plan
NEPS	National Environmental Policy and Strategy
NSTMP	National Sustainable Tourism Master Plan
OTA	Online Travel Agency
QRP	Qualified Retired Persons
SICA	Sistema de la Integración Centroamericana
SICCS	Central American Integrated System for Quality & Sustainability
TIDE	Toledo Institute for Development and the Environment
TPU	Tourism Police Unit
TSA	Tourism Satellite Account
WTTC	World Travel and Tourism Council

Executive Summary

The Ministry of Tourism and Diaspora Relations (MTDR) is the public sector agency which leads all initiatives for the responsible development of tourism in Belize. Its line agencies include the Belize Tourism Board (BTB) and the Border Management Agency (BMA).

At its core is the coordination of governmental bodies and tourism stakeholders. The approach is always a partnership with the public sector, private sector, and the community.

This annual technical report summarizes the accomplishments of this ministry. Health, safety and security measures were combined with covid recovery and stimulus initiatives. These were launched to tackle this monumental challenge which hit the travel and tourism industry hardest, as tourism is about people and mobilization to destinations outside one's usual environment. The embracing of technological integration substantially aided marketing efforts. The ministry was focused on product development to expand the tourism product offer and capacity building for personnel who deliver on the value proposition. Tourism infrastructure development and maintenance are also key to the overall visitor experience and the commitment to this is reflected in this document. Successes were realized in policy and planning as well as airlift expansion.

2021 was challenging and taught valuable lessons on the vulnerability of tourism to internal and external shocks. It nonetheless proved that the strength of #planBelize and the resilience of the Belizean workforce were able to sustain the tourism industry. It further showed that effective marketing and governance were key to driving the tourism industry forward. These can only be accomplished through the tried and proven strategy of continued stakeholder involvement of an industry led by private sector innovation and investment supported by an enabling public sector through the active involvement of communities.

Chapters

1. Introduction

The National Sustainable Tourism Master Plan (NSTMP) identifies targets for 2030. The coronavirus pandemic was the worst-case scenario for travel and tourism and threw those targets into doubt. Nonetheless, Belizean tourism stakeholders displayed remarkable resilience in preparing for tourism to rebound, and it is doing so at an accelerated pace. The ministry is now charged with driving tourism in unprecedented challenges towards industry stability and growth employing the latest technology, tools, and strategies. Through public-private partnership, policies, plans, strategies, new products, new markets, and new opportunities are being created.

More detailed data analysis has provoked the revamping of marketing efforts. Data-driven decision-making means critical examination of segmentation criteria. These drive innovative strategies to tap into a more sophisticated traveler who with technology at their fingertips, has a plethora of travel destination and activity options. The more sophisticated traveler is also more demanding, has higher standards and is harder to please. Therefore, technology must be integrated, minimum standards must be elevated, and capacity building must become institutionalized to allow hosts to exceed visitors' expectations.

Planning is even more important to ensure destinations themselves are good stewards of their evolving product. Planning is important to ensure that the necessary infrastructure, health, safety, and security mechanisms are in place to make destinations visitor friendly. The airlift must also be in place to give travelers convenient hubs to access Belize. Superstructures such as airports must offer the conveniences such as sky bridges, that travelers have come to expect.

During the first 100 days, the MTDR embarked on an ambitious and successful action-plan which achieved these key results:

1. Tourism Recovery Committee formed with PPP stakeholders to develop and implement robust industry recovery plan for our 6 main source markets: USA, Canada, Europe, Netherlands, South America, and Mexico.
2. Audit and evaluation of the operations and finances of the Border Management Agency, the Belize Tourism Board and Capital Projects, with recommendations for redesign or restructuring.
3. Initiated the revision of National Sustainable Tourism Master Plan and National Tourism Policy, and new National Recovery and Reinvention Strategy for Tourism 2021-2025
4. Completion of Belize City House of Culture and Rejuvenation Program, Rio Frio Infrastructure Works in the Mountain Pine Ridge, and Toledo Welcome Plaza

5. Bilateral Cooperation Program started with Peru on agri-tourism and gastronomy
6. Initial development of a Hospitality Training Institute, including training plan to maximize industry training across all tourism sectors
7. Completion of the Tourism Cooperation Agreement with El Salvador to support hospitality and tourism-based capacity building and bi-destination travel.
8. Health and safety protocols completed for cruise, process for the return of cruise calls,
9. All hospitality stakeholders elevated to Gold Standard status, including restaurants, sites and gift shops, and non-gold standard properties receiving support and assistance
10. Development of a new National Product Development Campaign, including re-designed **travelbelize.org**, a Belize App, and itinerary builder for travelers.
11. Establishment of the Diaspora Relations Unit and action plan developed with diaspora organizations and champions.
12. New proposals for implementing:
 - new and more travel-friendly standard operating procedures at the PGIA.
 - digital toolkit to support tourism businesses adaptation to new norm,
 - Garifuna trail program funding with Compete Caribbean,
 - credit support program for tourism businesses,
 - gradual reopening of land borders to foreign visitors only,
 - Sustainable Tourism Certification Program for protected areas, and
 - Improvement to the Belize Qualified Retirement Program.

2. Mission Statement and Priorities of the Ministry

MISSION STATEMENT

To promote sustainable economic growth through responsible tourism development, local engagement, and good governance.

Tourism is people-oriented, labor-intensive, and customer-focused. #planBelize speaks to stimulating the economy. That is exactly what tourism does. Every dollar spent in tourism has a ripple effect in the Belizean economy. The Plan stresses the importance of consultations, private sector investment, and attracting foreign currency. Tourism is all about consultations. The industry is private sector-led in a public sector-led enabling environment. While credit must be attributed to local investors, foreign direct investment (FDI) plays a significant part of overall tourism investment. Foreign currency is not attracted by FDI alone. Inbound overnight tourists and cruise visitors contribute handsomely to foreign exchange earnings. The importance of tourism cannot be overemphasized as the foreign exchange earnings generated by tourism allows Belize to trade on the global stage.

The focus of marketing is to stimulate demand, i.e., travel to Belize to experience the product offer. There must be standards in place to ensure visitor satisfaction. In that light, the ministry places great emphasis on planning and resource mobilization and sector coordination and integration. In so doing policies are harmonized, efforts are coordinated, strategies are aligned, and activities are mainstreamed. All this is for the sustainable development of tourism for the benefit of tourism stakeholders countrywide.

Many destinations have comparable products to Belize. Therefore, Belize must become even more competitive through product enhancement and product development. Destination visits have engaged stakeholders from varying tourism subsectors. These have formed the basis for programs and initiatives and policy development. These have also been instrumental in charting the way forward in bilateral tourism cooperation agreements with countries within our region.

The MTDR remains committed to creating opportunities for responsible tourism growth with its local, regional, and international partners.

3. Main Achievements of the Ministry by Program

3.1 Covid Recovery

The Covid recovery program was managed and focused on:

Objectives: To reopen entry points for the rebound of the tourism industry.
To provide industry guidance and financial assistance to a sector crippled by the coronavirus pandemic.

Main Actions: Identify and source financial assistance for tourism industry.
Collaborate with the respective agencies for the safe reopening of tourism.

Results:

COVID Recovery Plan	Completed 80% of the plan up to date.
Stimulus Package	Mobilized a \$2.6 million dollar grants program under the STPII Program Invested \$650,000 in small grants to micro and small tourism enterprises. Assisted over 600 micro and small tourism enterprises with recovery grants. Sourced affordable credit facilities for bridge and recovery financing for tourism businesses.
Small Stakeholder Assistance	Over 90 starter kits were distributed to micro and small tourism enterprises to assist in the start-up of business. Established a Tour Operator Insurance Support Program for new tour operators.
COVID-19 Dashboard	Developed a COVID-19 Dashboard for real time tracking of recovery key performance indicators (KPI). Provided a COVID-19 Digital Toolkit for tourism businesses to use in recovery.
Tourism Transport Incentives	Launched a Lease-to-Own Program for tourism businesses to modernize the tour van fleet.
Borders Reopened	Successfully reopened land borders for tourists in May 2021, and then for all travellers in February 2022.

Beneficiaries: Assisted over 600 micro and small tourism enterprises with recovery grants.

The quality of life was severely affected by mass layoffs due to the closure of the borders. Unemployment led to families struggling to put food on the table. The mechanisms put in place greatly assisted many households.

#planBelize: Enabling sustainable job creation

SDGs: No poverty, decent work and economic growth

3.2 Marketing

The objectives are:

1. To increase overnight and cruise arrivals by positioning Belize in the mind of travelers as a preferred leisure destination.
2. To increase tourism expenditure by effectively attracting higher end and larger volumes of visitors.
3. To increase private sector income and employment (and by default government revenues through the direct and indirect taxes associated with travel and tourism).

Main Actions: Investment in effective marketing strategies targeting

Results:

Tourism Marketing Committee	Convened a Tourism Marketing Committee with participation from each major destination to develop innovative marketing strategies.
Restructured Marketing Efforts	Grab Life Campaign (primarily digital based) is the flag ship campaign to embrace social media-based and digital marketing campaigns. This has garnered 2.7 billion impressions. Met with top 20 OTAs and wholesalers to drive bookings. Growth of 13% in registered travel advisors for Belize
Enhanced Marketing Plan	Re-designed the Marketing Strategy with a focus on Digital Marketing. Strong focus on the US, Canadian, European, Mexican and Central American Market.

Domestic Tourism

Develop Marketing Platform for Domestic Bookings	Launched the Belizean Traveller Campaign. Worked with Private Sector for local deals. Established a web-based platform for local bookings.
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Diaspora Tourism

Communication with Diaspora	Conducted Town Hall Meetings in Los Angeles, Las Vegas,
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Stakeholders	Houston, Chicago, New York, and Miami with aggressive marketing
Inbound Tourism	
Marketing Program for Long Stay	<p>Legislation passed in December 2021.</p> <p>Developed a Marketing Campaign for Long Stay Program, and a Web platform.</p> <p>Ongoing- Work with Private Sector to establish deal packages.</p> <p>Ongoing- Work with Immigration Department to streamline application.</p>
Market Training	<p>Conducted three webinars for over 150 travel advisors to promote the unique properties of Belize.</p> <p>Online training in Belize for over 800 European participants.</p>
Events	<p>Successfully executed a Virtual Travel Expo in November 2021.</p> <p>Participated in various travel trade events, such as Virtual Adventure Travel Networking Conference, Luxury and Romance Roadshow, LATA Virtual Expo, and Route Development.</p> <p>Participated in Expo 2020 Dubai in November 2021.</p> <p>Highlighted the Belize Barrier Reef in Belize's Marketing Campaign to commemorate the 25th Anniversary.</p> <p>Showcased the country through various influencers.</p>
Airline Co-Marketing	<p>Accomplished Direct Marketing with Airlines.</p> <p>Established Co-Marketing campaigns with Southwest, West Jet, Frontier and Alaska Air.</p>
Digital Marketing - USA	<p>Social Media has resulted in over 104 million impressions.</p> <p>Digital Media garnered over 20 million impressions.</p>
PR/Earned Media - USA	<p>Garnered 3.7 billion + total impressions.</p> <p>Secured print coverage in major publications such as New York Post, Time Magazine, Conde Nast Traveler, Travel + Leisure, etc. targeting over 125 million readers.</p> <p>Received 7 Awards including Time Magazine's World Greatest Places to Visit in 2021.</p>
Canadian Campaigns	<p>Increased by 230% travel demand via paid media campaigns.</p>
PR/Earned Media-Canada	<p>Garnered 125+ million in impressions via earned media.</p> <p>Secured placement in top tiered publications, such as the Globe, Elle Quebec, WedLuxe Magazine.</p>
Media Partnership-Canada	<p>Hosted Sports Illustrated Swimsuit Magazine, which will be featured in 2022 for a total circulation to 430 million readers.</p>

Marketing-UK

Successfully executed a Wanderlust Campaign focusing on Adventure Tourism, reaching more than 1.2 million page views.

Conducted campaigns in Responsible Travel, Scuba Tourism, Adventure Tourism, reaching over 5 million impressions.

Beneficiaries: Hotels, Tour Operators, Tour Guides, Restaurants, Attractions

Marketing brings in more visitors leading to the transaction multiplier, employment multiplier, income multiplier and the capital multiplier. The economy as a whole benefits as more money circulates within the economy.

#planBelize: Enabling sustainable job creation

SDGs: No poverty, decent work and economic growth



3.3 Airlift Expansion

FRONTIER AIRLINES INAUGURAL FLIGHT

The specific objectives are:

1. To add new airline routes into Belize by existing carriers.
2. To attract new airlines to fly into Belize.
3. To expand the size and enhance the services provided at the international airport.

Main Actions: Identification of potential carriers to fly to Belize.

Extensive engagements to lobby carriers to fly to Belize.

Results:

Airlift Development Committee (ADC) Airlift Development Committee reinstated and re-introduced almost all legacy airlines and routes.

New Airline & Routes Established new airline partnerships and routes (Alaska Airlines, Frontier Airlines).

Continued engagement for Mexican direct flight and European direct flight.

Mobilized Tour Guide Trainings in Hopkins, Cayo, San Pedro, Belize City, Placencia. Mobilized Enhanced Health and Safety Training countrywide.

Mobilized Frontline Leadership training for key frontline staff at PGIA and border points, including Immigration, Customs, Belize Agriculture and Health Authority (BAHA), BTB, Ministry of Health and the Tourism Police Unit (TPU).

Beneficiaries: Tour Guides, Police Officers, Immigration, Customs, BAHA, BTB, Ministry of Health and the TPU.

Skills development makes people more marketable and more valuable. This enables easier vertical mobility and freedom to choose a career as opposed to be confined with limited choices.

#planBelize: Educate the Nation

SDGs: Quality education



SOUTHEAST COAST STAKEHOLDER CONSULTATION IN DANGRIGA TOWN

3.5 Policy and Planning

The policy and planning objectives are to:

1. Develop policies and plans for the effective management of the tourism industry.
2. Improve collection and management of taxes needed for developing tourism plans.

Main Actions: Collaborate with respective stakeholders in the public and private sectors.

Conduct market intelligence to ascertain the primary and secondary data needed.

Results:

Cruise Policy	Established a Cruise Policy Working Group to guide the National Cruise Policy update process.
Tourism Development Plan	Developing Tourism Development Plan for the Mountain Pine Ridge Forest Reserve.
Improve Tax Administration	Drafted legislation for an Amnesty Program for hotel licensing for short-term rentals. Negotiated an MOU with Belize Tax Service to improve tax management in tourism. Signed an MOU with Airbnb to support this sectors integration within our licensing and taxation system.
Qualified Retired Incentives Program	Designed and drafted legislation for expansion of the QRP program to support new investments.
Destination Outreach	Successfully completed nationwide ministerial and executive team visit to discuss planning priorities with tourism stakeholders.
Market Intelligence for Resilience	Partnered with the CTO and George Washington University to build understanding of unique challenges faced by tourism business owners during the pandemic, in order to build future resilience to similar market shocks.
Sustainable Tourism Development	Partnered with Association of Protected Areas Management Organizations (APAMO) to support Tourism Development in protected areas. Signed on the Central American System for Quality and Sustainability (SICCS). Completed a National Sustainable Tourism Master Plan (NSTMP) Mid-Term Performance Report. Begun update of the National Sustainable Tourism Master Plan with the University of Belize. Established a Sustainable Tourism and Cultural Desks at the BTB. Ensured sustainable tourism policy integration in various policies, such as National Climate Change Policy. Developed environmental monitoring plans for Caye Caulker Marine Reserve, Mountain Pine Ridge, and Thousand Foot Falls.

Anti-littering campaign cleaned up areas in San Pedro Town, Belize City, and on the George Price Highway.

Governance Rrestructured the BTB's Organizational Structure to better align to industry realities and needs.

Successfully achieved financial viability at the BTB, post the COVID-19 revenue shortfall.

Tourism Bond Preparatory Works on Bond has commenced.

Beneficiaries: Tourism stakeholders and destinations countrywide

Poor planning or no planning leads to unexpected negative consequences which tourism destinations cannot afford. Policies and plans are important for destinations to be competitive and sustainable.

#planBelize: Protection of the environment and conservation of natural resources/assets

SDGs: Sustainable economic growth and natural resource conservation



LATAM 2022 – HIGH LEVEL MEETING

3.6 Product Development

The objectives of this program are:

1. To enhance and expand the tourism product offer.

2. To attract foreign direct investment, for example through branded hotels, which have their extensive customer base.

Main Actions: Established an Investment Desk and investment information shared with potential investors.

Desktop research conducted to assess potential products to add to the product offer.

Results:

Private Aviation	Commenced work on developing a Private Aviation Development Program and facilitation exercise
Cultural Tourism	<p>Established a cultural tourism desk.</p> <p>Begun design and development focus on culture-based and community-based tourism products in Orange Walk, Stann Creek, and Belize River Valley.</p> <p>Launched the Garifuna Cultural Tourism Trail in the Stann Creek District, with USD \$300, 000 in grant funds provided by the Compete Caribbean Program.</p> <p>Mobilizing financing for Music Studios in Belize City and Orange Walk and Culinary Vendor Upliftment Project in Belize City.</p>
Nautical Tourism	Established a Nautical Tourism Committee that is currently creating a strategy to develop nautical tourism.
Cruise Restart and Development	<p>Convened a national Cruise Tourism Task Force to support and guide the reopening process.</p> <p>Developed a Cost Benefit Analysis of Cruise Ports Development in Belize City.</p> <p>Held a Town Hall with Cruise Executives and stakeholders in Belize.</p> <p>Community Support Program for Cruise Tourism Buffer Communities in Belize City.</p> <p>Enhanced Fort George Tourism Zone.</p>
Branded Hotels	<p>Inaugurated the first Marriott (Alaia) resort in Belize.</p> <p>Established an Investment Desk to promote branded hotel development in Belize.</p>
Hotel Room Stock	Saw 10% growth in room stock since 2019.
Beach Management	Completed beach enhancements projects in San Pedro (Boca del Rio) and Caye Caulker (Palapa Beach).

Tourism Cooperation Agreements Updated the Costa Rica Tourism Cooperation Agreement.
Strengthened cross-border tourism partnership with Guatemala

Border Management Upgraded human resources and facilities at all border points.

Beneficiaries: Ambergris Caye, hotel employees countywide

New product offerings create jobs countrywide, which leads to the multiplier effect. Jobs require women and youth, employs the unskilled and enhances their skill levels. Employment forces learning by doing, i.e., first-hand practical education. The exposure to international clients opens up the mind and creates new experiences.

#planBelize: Fostering Entrepreneurship, Enabling Sustainable Job Creation

SDGs: No poverty, decent work and economic growth, reduced inequalities

3.7 Tourism Infrastructure Development and Maintenance

The objective is to provide the infrastructure to enable the tourism industry to be accessible, develop and flourish.

Main Actions: Collaborate with the respective public and private sector agencies and stakeholders to put the required infrastructure in place.

Results:

Infrastructure Development Completed paving of Hopkins road, and improvements to the Actun Tunichil Mucnal (ATM) road.
Commenced construction of ATM visitor center.
Completed development of Artisan Plaza in Caye Caulker.
Commenced design work for improvements of Placencia Pier, Secret Beach Roads, Cahal Pech Road and Malacate Road.
Signage improvements for Hopkins Road, Southern Highway and George Price Highway.
Successfully lobbied the Ministry of Infrastructure Development on works to be done on the roads to the Mayflower Bocawina National Park and Cockscomb Basin Wildlife Sanctuary.
Completed the Toledo Welcome Plaza Works, Rio Frio Cave Works, Rio On Pools Works, and solar system Installation at the Thousand Foot Falls.

Near completion of the Nim Li Punit and Lubaantun Visitor Center enhancement.

Beneficiaries: Bocawina National Park, Cockscomb Basin Wildlife Sanctuary, Punta Gorda Town, Caye Caulker artisans, Forest Department, visitors to attractions

Infrastructure creates accessible sites and destinations which leads to increased sales and employment, which generates household income and better qualities of life.

#planBelize: Ensure government builds and maintains roads

SDGs: Sustainable industry, innovations, and infrastructure development

3.8 Tourism Quality Management

The objectives are to ensure that a high-quality tourism product is provided and maintained, and to ensure compliance with tourism policies and legislation.

Main Actions: Conduct Audits and Inspections.

Execute enforcement operations to ensure compliance with tourism policies and legislation.

Results:

Compliance Mechanism

Commenced enforcement operations to check compliance with tourism legislation by Hotels, Tour Operators and Tour Guides.

Drafted three (3) MOUs to support enforcement operations with Hol Chan Marine Reserve, Toledo Institute for Development and the Environment (TIDE), and the Belize Police Department (BPD).

Commenced conducting compliance audits of Hotel properties to improve quality of facilities and services.

Established a Quality Concierge to provide superior customer service to tourism stakeholders and to improve complaints management.

Launched a Chatbot to support customer queries and complaints.

Established a Cruise Concierge Team to provide tourism informational and hospitality services within the Belize City downtown area during cruise ship days, as well as to improve security monitoring.

Beneficiaries: Licensed Hotels, Tour Operators and Tour Guides; overnight tourists, cruise passengers

Licensed service providers invest time and money to become compliant. In so doing minimum standards must be maintained. Illegal service providers do not worry about compliance, which depreciates the overall Belize experience leading to poor reviews and less visitors. This leads to less revenues. In forcing compliance, standards are met which ensures sustainable livelihoods for tourism employees.

#planBelize: Safer communities

SDGs: Decent work and economic growth

3.9 Health, Safety and Security

The objectives is to put the appropriate mechanisms in place to ensure the health, safety and security of domestic and inbound tourists.

Main Actions: Apply the multi sectoral approach to marine and terrestrial attractions.

Results:

Gold Standard Program Expanded the Program to gift shops, restaurants, vendors, transport providers and attraction to cover the value chain with international health and safety standards.

Safe Travel Recognition The Gold Standard Program was recognized by the World Travel and Tourism Council.

COVID Testing Collaboration with the Ministry of Health and Wellness to facilitate vaccination of frontline personnel as well as nationwide testing options for tourists.

Safe Reopening Developed safe entry protocols in collaboration with the respective agencies for the reopening of airport, land borders and seaports.

Provided clear and concise health and safety protocols to airlines.

Successfully reopened land borders for tourists in May 2021, and then for all travellers in February 2022.

Tourism Security and Safety Signed a MOU with the police for BTB support to the Tourism Police Unit.

Currently developing National Tourism Security Strategy.

Currently engaged in a process to develop emergency management plans for tour operators and hotels.

Handed over transportation, security, and monitoring equipment to the Forest Department to improve tourism and safety management in the Mountain Pine Ridge.

Tourism Security Vehicles currently being sourced by the Sustainable Tourism Program II.

Seafarer Navigational Lamp refurbished and installed at Toledo Welcome Center.

To express our industry's appreciation of the heroic work six frontline health workers did during the height of the pandemic BTB recognized these six frontline health workers.

Beneficiaries: Visitors to Belize, Forest Department, certified Gold Standard hotels, tour operators, attractions, transportation providers, gift shops and restaurants

Visitors want to feel safe when they travel. By putting the appropriate mechanisms in place, livelihoods for tourism employees are safeguarded.

#planBelize: Healthier choices, arresting crime and guaranteeing national security

SDGs: Good health and well being

3.10 Technological Integration

The specific objectives of this program are:

1. To incorporate Big Data, artificial intelligence, analytics, automation, and real-time data to make effective plans, policies and decisions to drive tourism, innovation and development.
2. To utilize technology to improve the speed and quality of service delivery.
3. To offer online options to both leisure travellers and investors to facilitate their queries, needs and interests.

Main Actions: Develop online portals and applications.

Contract big data providers who can offer the most affordable tools and options.

Results:

Build Big Data and Data-Driven Decision Making	<p>Procured ARC Platform to lead data driven analysis for BTB and stakeholders. Initiated discussions for the development of a Tourism Satellite Account (TSA) for Belize.</p> <p>Big Data introduced the MTDR via introductory course.</p> <p>Statistical platform integrated in the Belize App.</p> <p>New Executive Data Analysis App being developed.</p> <p>Tourism innovative lab project empowered tourism businesses on digital skills and technology optimization.</p>
Online Licensing	<p>Commenced development of online platform for licensing of hotels, tour operators, QRP, etc. Completion projected for December 2022.</p>
Improve Services	<p>Refined Tourism Data Management System and online portal to improve service provision.</p> <p>Launched a Belize App, promoting travel to Belize.</p> <p>Launched Business WhatsApp for local stakeholders to communicate with BTB.</p> <p>Constant update of BTB Website and Content by stakeholders.</p> <p>Improved BTB's IT capabilities and access to technology.</p>
Digitization at Borders	<p>Commenced Automation and Digital Integration Strategy at Border Points</p>
Online Presence	<p>Developed a Google my Business toolbox and guide to optimize tourism businesses' online presence.</p>
Diaspora Re-investing in Belize	<p>Launched a digital platform for the Belizean Diaspora to donate and invest in Belize's development.</p>

In addition to the ten programs mentioned above, the following were also accomplishments:

Diaspora Re-investing in Belize	<p>Over \$625,000 invested in Belize via donations from the Belizean Diaspora.</p> <p>Diaspora has further donated 100 laptops to students via the Ministry of Education.</p>
Industry Awareness	<p>Tourism Newsletter series published, with the first article being on Tourism Governance by the Ministry.</p>

BTB Improved Performance Appraisal and Recognition System.

Beneficiaries: Hotels, tour operators, tour guides, visitors

Automation and technological integration make employees more effective and efficient. In so doing their tasks can be completed better and faster. The tourism industry does not take a holiday but time away from the family causes a strain on families. Efficiency makes the workload less stressful, and employees can get back to their families faster.

Plan Belize: Digital Transformation

SDGs: Industry, innovation, and infrastructure

4. Lessons Learnt

The past year has taught us many important lessons, including:

4.1 Tourism is extremely vulnerable to internal and external shocks.

4.2 Investment can only be facilitated with effective service delivery and improved processes which expedite and encourage rather than slow down and frustrate investors. Process flows needs to improve to reduce the time investors need to break ground on their respective projects.

4.3 Tourism research is lacking both at the micro and macro level. We need to understand the types of market failures that exist, and the degree to which businesses are affected. Research is also needed to find solutions to these.

4.4 Data is needed to tap into the nature of employment in tourism including:

Youth employment

Women employment

Indigenous employment

4.5 Tourism is a small-scale operation in Belize. Micro, small and medium enterprises need a tremendous amount of work in terms of financial management, record keeping, and business plan development. Lack of these make it extremely difficult to access grants and other financing mechanisms.

4.6 Mechanisms need to be put in place to formalize small-scale tourism operations. Training is urgently needed in business operations and various aspects of customer service.

4.7 Tourism service providers need to be educated in the importance and benefits of digitization and having an online presence. Significant revenues are lost by simply not utilizing the available tools to market their businesses.

5. Future Priorities and Plans

There are numerous programs and initiatives already in place at the MTDR that need to be continued, financed and in some cases, modified.

Marketing

4.1 Marketing initiatives are ongoing to tap into new markets. One of the primary activities to be undertaken is segmentation based on geographic, demographic, psychographic, and behavioural characteristics. The objective is to tap into these markets to increase the overnight arrivals and meet and exceed pre-covid levels.

4.2 The importance of the domestic tourism market was realized during the pandemic. The objective is to nurture this segment and increase the destination visitation and occupancy levels of this sector.

Tourism Governance

4.3 Visitor safety and security are important for a successful tourism destination. There is a need to make high quality video surveillance affordable and common in tourism destinations. The MTDR is also focused on safety at municipal airstrips and water taxi terminals.

4.4 The MTDR will continue to develop and strengthen policies and legislation. These include Hotel, Tour Guide and Tour Operator legislation. The Cruise Policy is presently being updated and is just one of the important guidelines for the tourism industry.

Tourism Infrastructure and Accessibility

4.5 The MTDR is keen in expanding and attracting direct flight from USA, Canada, Europe and Mexico. Face to face meetings will be executed to pitch the economic feasibility to the respective carriers. The addition of new carriers will increase the foreign exchange earnings and total visitor expenditure to Belize.

4.6 The expansion of the international airport is also important. Upgrading the airport facilities are key to alleviate passengers having to disembark planes in rain and instead disembark onto a bridge from the airline straight into the terminal facility.

Tourism Sustainability and Quality Assurance

4.7 Environmental certification programs will be pursued for terrestrial and marine based service providers. There is no stronger justification than the acknowledgement that Belize is a natural resource-based tourism product. Sustainability if the natural environment is therefore critical for the livelihoods of so many families, and an economy that are tourism dependent. The ministry will also

support the marketing and product development initiatives of protected areas as they actually manage the product that visitors come to see.

4.8 Enhancement of the tourism value chain through research and applications. A Tourism Consumption Study conducted in 2018-19 revealed important indicators of the agricultural needs and shortcomings. Tourism linkages need to be strengthened. There is a program actively being pursued in collaboration with the Department of Agriculture. However, the objective is to have a system in place with all suppliers both locally and regionally.

4.9 To better understand the dynamics of the tourism sector, the MTDR plans to conduct a human resources development knowledge & skills audit for tourism & hospitality industry. In this way we are better able to address the needs of the industry through a systematic collaboration with trainers and training institutions, including schools. The vision is to establish a Hospitality Training Institute which can cater to the needs of the tourism industry year-round.

Tourism Product Development

To create a favorable investment climate for tourism, we need to provide tourism-specific fiscal incentives. This includes developing the investment material, tools, portals. In addition, the human capital must also be developed and trained to effectively engage investors. Furthermore, the strategy involves proactively representing Belize at investment summits as opposed to being reactive in waiting for investors to approach the Ministry. This approach will allow us to attract branded hotels to Belize.

2. Staffing and Financial Considerations

The MTDR proudly serves its constituents countrywide. The challenge it faces in doing so include limited financial, human, and material resources. With a limited technical team of six persons, it can be very challenging to juggle schedules and commitments where there are multiple initiatives, meetings, etc., taking place. Having additional technical staff would noticeably improve the MTDR's effectiveness.

The Ministry's strengths include the competencies, skills and positive attitude of a staff which is committed to the success of the tourism industry. The team is very reliable and resourceful.

The MTDR recognizes that GoB has finite financial resources. These must be effectively budgeted to include specific training to enhance the competencies of its staff. Where technical officers need capacity building this often comes in the form of customized training which is not as generic as training for finance or administrative officers. Customized training may attract a higher cost. Furthermore, the MTDR must have the tools, software, and equipment to function effectively so the tourism product can exceed visitors' expectations.

3. Conclusions and Recommendations

Tourism is Belize's largest foreign exchange earner. The economic importance of tourism became evident because of the coronavirus pandemic. The MTDR takes pride in not only the successful reopening of all entry points, but the Gold Standard protocols that were implemented. Those protocols were an important part of the resilience and the rapid pace at which tourism is rebounding.

The MTDR is committed to stakeholder consultation and the multi-sectoral approach in addressing tourism related issues. Policies and plans must be cohesive and involve the relevant stakeholders.

There are many programs and plans from international agencies which are tourism related. We therefore recommend that there is an integrated approach from the Ministry of Finance, Economic Development, and Investment (MFEDI) to harmonize these platforms so that the MTDR can more effectively tap into these resources in a wholistic as opposed to a piecemeal approach.

The revised iteration of the National Tourism Council is an important initiative to steer tourism development in Belize. We recommend that there is the highest level of commitment by public and private sector entities to ensure that representatives to this body can effectively guide tourism in Belize. For example, tourism infrastructure, such as roads, enable attractions and destinations to be accessible. When the visitation increases, so does the multiplier effect, and the local and entire economy gets a needed financial injection.

Annex 1. List of Publications and Communications produced by the Ministry in 2021

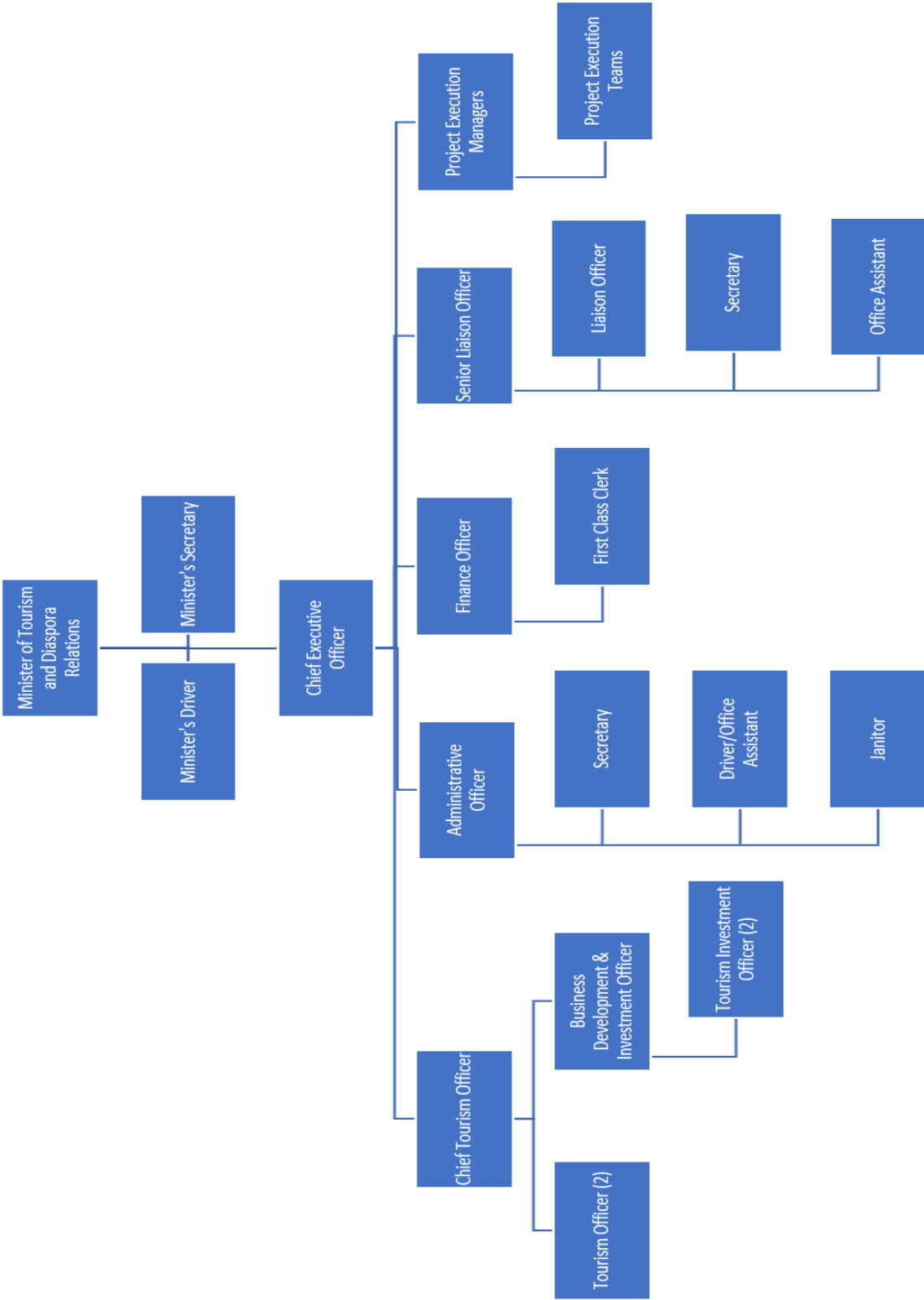
Dive into **Tourism Newsletter Vol 2.- Vol 12**

- Strong & Resilient Tourism & Agriculture, Vol 2.
- Strong & Resilient Tourism & Agriculture - The Win-Win Relationship, Vol 3.
- Strong & Resilient Tourism & Agriculture Where there's a Will there's a Way, Vol 4.
- Domestic Tourism in Belize, Vol 5.
- Adding Value, the Belizean Way, Vol 6.
- Tourism Consumption Study Highlights, Vol 7.
- Tourism Resilience in A world of Pandemics, Vol 8.
- The Rippling Effects of Covid 19 on Tourism Service Providers, Vol 9.
- Tourism Maintaining its resilience, the local way, Vol 10.
- Sargassum a major seaweed bloom phenomenon, Vol 11.
- Tourism Governance, Vol 12.

Annual Tourism Statistical Digest

- Travel & Tourism Statistics Digest 2020

Annex 2. Organizational Structure of the Ministry



Annex 3. List of Professional and Technical Staff of the Ministry

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