



ANNUAL TECHNICAL REPORT

MINISTRY OF TOURISM AND DIASPORA RELATIONS

FISCAL YEAR 2023-2024

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Message from the Minister

Hon. Anthony Mahler



In November 2020, the PUP was elected with a bold vision under #planBelize, aiming to create a Belize that works for everyone. #planBelize committed to enhancing education and health, providing better homes, ensuring safer communities, and improving the overall quality of life for all Belizeans. Under this John Briceño PUP administration, the unemployment rate fell to a historic low of 3%, the economy grew annually, the debt-to-GDP ratio decreased from 133% to 64%, and the minimum wage increased from \$3.35 to \$5.00. We continue striving to eliminate the mediocrity hindering our institutions, and after three years in government, we are well-prepared to continue our comprehensive efforts.

The Ministry of Tourism and Diaspora Relations has consistently promoted sustainable economic growth through responsible development, aligning with #planBelize objectives. Tourism, a key contributor to Belize's \$6.5 billion economy, generates over 40% of GDP. Global projections highlight tourism's significance, expecting growth from 9.2% of global GDP in 2023 to 11.6% by 2033. Global economic uncertainty persists due to geopolitical tensions and potential downturns. However, the Caribbean region, including Belize, shows robust growth.

We project over 6% growth for Belize in 2024. The first quarter alone saw a 17% increase in overnight arrivals, with record-breaking months. The cruise sector welcomed over 900,000 visitors from 309 calls, a 47% increase from the previous year. Full recovery in the cruise sector requires a berthing facility, but the government is committed to resolving this challenge. Post-pandemic shifts in consumer demands and global economic trends require adaptation and innovative policy

development. The PUP government has driven economic recovery and improved the investment climate.

The tourism sector's recovery underscores its role in economic stability and growth. Emerging tourism trends, such as younger travelers seeking luxury and adventure, present opportunities for Belize. Strategic initiatives like updating the Cruise Tourism Policy and the National Sustainable Tourism Master Plan aim to foster sustainable growth. The government's commitment to collaborating with the private sector will continue to enhance Belize's tourism offerings, ensuring long-term economic benefits and competitiveness.

Our recovery and progress are a testament to the dedication of key industry stakeholders, public-private partnerships, and the support of the Belizean people. Over three years into this administration's commitment, the MTDR proudly remains aligned and on track with #planBelize.



Message from the Chief Executive Officer

Ms. Nicole Usher Solano



The two main areas of focus of our ministry are Tourism and Diaspora Relations. Together with the Belize Tourism Board and the Border Management Agency, we are advancing #planBelize.

In 2023, Belize's tourist arrivals reached 467,000, achieving a 93% recovery compared to 2019. Full recovery is expected in 2024, with main suppliers, such as hotels, tour operators and tour guides already surpassing pre-COVID 19 figures. This is further cemented with one in four Belizeans working in the tourism industry, and with job opportunities on the rise. UN Tourism predicts international tourism will fully recover and surpass pre-pandemic levels, with an estimated 2% growth over 2019 figures this year. The prediction for the Caribbean and Belize is even more optimistic. Despite global economic and geopolitical challenges, including inflation, high interest rates, oil price volatility, and trade disruptions, our government and private sector are resilient and better prepared than ever.

The Ministry of Tourism and Diaspora Relations remains focused on planning, optimism, and adaptability. The pandemic's impact was severe, but reopening airports and land borders has set a new path forward. With various programs, we have strategically impacted all industry aspects, including hotels, tour operators, MSMEs, skills training, certification, marketing, art, music, food, education, and culture. Future priorities include enhancing airlift capacity, expanding marketing to niche markets, focusing on hospitality and service training, and strengthening public-private partnerships to address infrastructure needs and overall sustainable development.

The Border Management Agency will continue rehabilitating border facilities and improving border-crossing processes for citizens and visitors. Travellers who utilize our land borders

(approximately 23% of total tourism arrivals annually, based on 2019 figures) are a combination of travellers from the region, as well as Europeans and other nationalities. Many of these travellers typically support tourism MSME's. It is important to improve the visitor experience through all our border points, a main recommendation of the recently updated National Sustainable Tourism Master Plan that promotes building regional linkages and improving frontier interfaces.

Our connection with the Belizean diaspora is also strengthening, with more Belizeans living abroad visiting and investing in Belize. In 2023, remittances exceeded \$220 million, and recorded donations valued nearly \$2 million. The diaspora's contributions extend beyond monetary support, offering skills, expertise, and cultural diversity. Our activities aim to strengthen these connections. The MTDR and its statutory boards, BTB and BMA, continue to recognize and support the priorities of #planBelize.



Hopkins Village, one of many emerging tourism destinations in the country

List of Abbreviations

ADC	Aviation Development Committee
BHA	Belize Hotel Association
BMA	Border Management Agency
BTB	Belize Tourism Board
BTIA	Belize Tourism Industry Association
CATA	Central American Tourism Agency
CTO	Caribbean Tourism Organization
DRIP	Diaspora Returnee Incentive Program
GDP	Gross Domestic Product
IMF	International Monetary Fund
ISO	International Organization for Standardization
LATAM	Latin America
MSME	Micro Small and Medium-Sized Enterprise
MTDR	Ministry of Tourism and Diaspora Relations
NICH	National Institute of Culture and History
NSTMP	National Sustainable Tourism Master Plan
PACT	Protected Areas Conservation Trust
PGIA	Phillip Goldson International Airport
PUP	People's United Party
QMS	Quality Management System
SICA	Central American Integration System
TAC	Tourism Advisory Council
TPU	Tourism Police Unit
UN	United Nations

Executive Summary

During the last year, under #planBelize, the government has focused on enhancing education and health, providing better homes, ensuring safer communities, and improving the overall quality of life for all Belizeans. Significant strides have been made: the unemployment rate has dropped to a historic low, the economy has grown annually, the debt-to-GDP ratio has decreased, and the minimum wage has increased. The MTDR, along with the BTB and the BMA, consistently promote sustainable economic growth through responsible development, aligning with #planBelize.

Tourism contributes approximately 46% to Belize's \$6.5 billion economy, making it the most significant industry. In 2023, Belize's tourist arrivals reached 467,000, achieving a 93% recovery compared to 2019. UN Tourism (an organization that Belize is now an official member of) predicts international tourism will fully recover and surpass pre-pandemic levels this year, with an estimated 2% growth over 2019 figures, and Belize is no exception.



Tourism is the most significant economic driver of Belize's economy today

The Caribbean region, including Belize, shows robust growth despite global economic challenges like inflation, high interest rates, oil price volatility, and trade disruptions. Despite these challenges, the IMF continues to identify tourism as a key driver of economic recovery and growth, particularly in emerging and developing economies.

About one in four Belizeans works in the tourism industry, with job opportunities rising. The first quarter of 2024 alone saw a 17% increase in overnight arrivals, with record-breaking months. The cruise sector welcomed over 900,000 visitors from 309 cruise ship calls, a 47% increase from the previous year. Full recovery in the cruise sector requires a berthing facility, but the government is committed to resolving this challenge.



One in every four working Belizean works in the Tourism Sector

The work continues in all areas of tourism growth and development. The tourism industry continues to expand with new hotels and resorts. Marketing efforts have successfully positioned Belize as a prime destination for adventure, ecotourism, and cultural experiences, increasing awareness and visitor numbers. Engagement with the Belizean diaspora has resulted in more Belizeans visiting and investing in Belize. Regional tourism marketing efforts include promoting

Belize in Latin America and maintaining involvement in regional integration organizations. Airline development has seen new services and increased capacity from airlines such as United, JetBlue, Southwest, American, Alaska, WestJet, Delta, and COPA, enhancing connectivity. Belize has received several international recognitions for its tourism offerings and will host the World Sustainable Travel and Hospitality Awards in September 2024. Infrastructure development projects focus on road upgrades, improved signage, beautification of gateways and towns, and the development of community and recreational facilities.

Tourism security and safety have been bolstered with the expansion of the TPU, the establishment of a National Tourism Security Task Force, and improvements in communication systems at key archaeological sites. Sustainable tourism development efforts include updating the NSTMP and the National Cruise Tourism Policy. Training and capacity development programs, such as the *Elevate* National Training Program, have trained over 1,500 individuals in 2022 and approximately 1,800 in 2023, with plans for the Elevate Training Academy underway. In the areas of sports, culture, and events, the support from tourism continues, with priority given to the bolstering of numerous events and festivals that foster cultural engagement and promote tourism.

With regard to Diaspora Relations, the engagement is robust and ongoing. The contributions of Belizeans living abroad are invaluable, with remittances for 2023 exceeding \$220 million and donations valued at nearly \$2 million. The BMA continues to rehabilitate border facilities and improve border-crossing processes for citizens and visitors. Future plans include building a marina in Punta Gorda Town to attract more vessels and tourists.

Belize's progress under #planBelize reflects the dedication of key industry stakeholders, public-private partnerships, and the support of the Belizean people. Over three years into this administration's commitment, the MTDR proudly remains aligned and on track with #planBelize.

Introduction

While various aspects of the MTDR have shifted over the years, it is the government entity that provides leadership, strategic direction, good governance, and oversight on all matters relating to the development of tourism and diaspora relations on behalf of the Government of Belize.

There are two statutory bodies within the MTDR. The BTB functions as a strategic partner between the government and the private sector to develop, market, and implement tourism programs that fulfil the emerging needs of local industries and the international tourism market. The BMA is responsible for managing designated border facilities at four official points of entry in Belize: Northern Border, Western Border, San Pedro, and Punta Gorda. They also operate administrative offices in Belmopan and Belize City.



Tourist Arrivals at PGIA rebounding after the COVID-19 Pandemic

Belize was closed for tourism business for much of 2020 and 2021 after being shut down due to the COVID-19 pandemic. While the airport reopened in October of 2020 after being closed for six

months, the land borders did not fully reopen until March of 2022 when Belize removed all public health measures at the points of entry. The cruise industry was closed for over a year from March 2020 to July 2021. The pandemic regulations including curfew and testing had a direct effect on tourism. Additionally, the spread of new strains of the COVID-19 virus, such as the Delta strain, continued to affect travel. Recovery since the pandemic has been positive, and it is expected that arrival numbers will reach and surpass pre-pandemic levels in 2024.

This report focuses on the major achievements of the industry over the fiscal year 2023-2024.



Ambergris Caye continues to be our leading tourism destination

Mission

The mission of the MTDR is to promote sustainable economic growth through responsible tourism development, local engagement, and good governance. The MTDR has a mandate that reflects the

vision of #planBelize and a strong future for the tourism industry. The BTB is the statutory body responsible to promote and regulate tourism in Belize. In order to fulfil its role in developing Belize as a premier tourist destination, the BTB consults with local, regional, and international stakeholders and committees. Some of them include the TAC, the ADC, the Tour Guide Committee, the BTIA, the BHA and many others. The BMA is a statutory body that functions as a strategic partner between the government and the private sector to administer, control and manage designated border points to ensure the legal, effective and efficient movement of individuals and goods.



The Ministry of Tourism and Diaspora Relations led by Hon. Anthony Mahler

Key Industry Achievements (2023-2024)

Airlift

Over the last three years, significant investments have been made to build new air routes and increase capacity, resulting in an approximate 35% increase in airlift. Key developments within

the last fiscal year include: JetBlue initiating service from New York in December 2023 and Southwest commencing flights from Baltimore in March 2024, as well as increasing Houston flights to eight times a week for the summer.



Belize's airlift has grown by 35% since 2021.

American Airlines increased Charlotte flights to daily and Miami flights to twice daily during the high season. Alaska Airlines increased year-round flights from Los Angeles to daily and seasonal flights from Seattle to four times weekly. WestJet increased its Calgary flights to twice weekly and Toronto flights to three times weekly, extending the season by six weeks into May. Delta increased its Minneapolis route to twice weekly, and COPA announced the permanent addition of a second flight from Panama in April, utilizing a larger aircraft with double the capacity. United has also responded to peak-period demands by adding week-to-week frequencies on routes from Houston, Newark, and Chicago, and has recently announced an upcoming direct flight from San Francisco in December 2024.

Marketing and Promotion

Efforts to position Belize as a premier destination for adventure, ecotourism, and diverse natural and cultural experiences continue. Awareness of Belize in key markets continues to increase. While maintaining a strategic focus on North America, increased investment is being directed towards Latin America and Europe, areas with tremendous untapped potential.

A new marketing agency, TM Americas, was engaged for the LATAM region in order to improve awareness and increase arrivals from this area. From June 2023 through January 2024, extensive PR activities in the LATAM market resulted in Belize being featured in several stories across print, broadcast, electronic, and social media, garnering 489,145,471 impressions with an estimated media value of US\$1,560,662. The consumer campaign "Belicidad" for search and paid social media launched on September 11th, is performing above average with a campaign conversion rate of 11.4%, well over three times the industry average. Google Ads led website conversions, with Google Display ads serving as the primary conversion point, achieving 23.3k conversions in January, followed by YouTube ads with 17.5k conversions. Display ads' conversion rate increased to 20.9%, driven by the Adventure campaign in Central America.



The Belize Tourism Board continues to position Belize as a leader in sustainable and eco-adventure travel

Trade activities involved extensive sales calls, travel agent sales calls, agent training sessions, and training of 1,990 agents across various LATAM countries. Efforts in countries like Argentina,

Brazil, Colombia, El Salvador, Guatemala, Mexico, Panama, Peru, and Ecuador have helped to increase engagement within the tourism sector. Ongoing stakeholder engagement will improve responses from local hoteliers and tour operators for roadshows and events in this region and build capacity in servicing this new market.

Progress can be seen in the Mexican market. The government’s decision to remove the land border departure fee for visiting Mexicans from Yucatan and Quintana Roo is expected to support marketing efforts. Success in regional markets can diversify and extend the tourism season. Active participation will continue in regional integration efforts such as the CTO and SICA, including CATA. In January 2024, Belize assumed the Presidency of the Mundo Maya Organization, focusing on improving land, sea, and air connectivity within the region. The first Mundo Maya Ministerial meeting was hosted in San Ignacio, Cayo, in June 2024, which coincided with the Belize Archaeology Symposium.



Belize currently holds the Honorific Presidency of the Mundo Maya Organization

Furthermore, increased engagement with the Belizean diaspora has resulted in more Belizeans returning home as visitors. The Belizean Traveller campaigns aim to increase travel among Belizeans living at home and abroad. Belize's attractions and activities are also being showcased in videos at Times Square in New York. For October and November alone, the videos were seen

by an estimated 90,000,000 visitors. Five different seasonal videos will be featured for 15 months, with Belize videos running 26,280 times in 2024.



Belize is being featured at Times Square in New York City

International awards showcase Belize’s excellence and commitment to sustainability, with over 35 hotels and destinations recognized by Travel & Leisure, Conde Nast Traveller, and Travel Weekly, among others. In September 2023, Belize will host the inaugural World Sustainable Travel and Hospitality Awards, reinforcing its global leadership in sustainable tourism.

National Sustainable Tourism Master Plan Update

The updated National Sustainable Tourism Master Plan charts a sustainable path for tourism development up to 2030, prioritizing responsible growth that benefits Belize's diverse population, preserves its unique natural and cultural heritage, and boosts economic development and competitiveness. The plan emphasizes urban management, coastal resilience, marine conservation, integrating protected areas and cultural sites into tourism, establishing tourism zones for strategic investment, long-term infrastructure planning, and decentralized tourism governance. As part of the sustainable development agenda, the BTB and the PACT signed a 3-year co-financing

partnership valued at \$2.5 million to invest in the rehabilitation and enhancement of tourism facilities and services at protected areas.



The Belize Tourism Board and the Protected Areas Conservation Trust signed a ground-breaking agreement to fund the enhancement of tourism within protected areas in Belize

Belize is also focusing on environmental stewardship, with a campaign to ban environmentally harmful sunblock products to protect the reef. There are plans to establish a Beach Management Unit to address issues like erosion, beach reclamation, beach nourishment, and threats such as Sargassum.

Infrastructure Development

With the surge in arrivals, improving the tourism product to exceed guest expectations is essential. Adequate infrastructure, including well-maintained roads, reliable utilities, and an efficient and modern transportation system, enhances the destination's overall appeal. The government's budget for the next fiscal year allocates significant resources to infrastructure needed to support the tourism industry, including:

- \$40 million for road infrastructure improvements,
- \$7.5 million for solid waste management,
- \$150 million for renewable and resilient energy generation and distribution,
- \$100 million for a wastewater treatment plant for North Ambergris, and
- over \$100 million for hospital investments.

The completion of the Coastal Road has significantly impacted tourism in central and southern Belize. The Mountain Pine Ridge Road leading to Caracol has opened up new opportunities, with similar expectations for the Sarteneja road, the road leading to Lubaantun, and the paving of the Secret Beach Road in northern Ambergris. Roads are vital arteries providing access to destinations.

Upliftment Projects



The Ministry of Tourism and Diaspora Relations continues to partner with key sectors to enhance the tourism experience in Belize.

Enhancing urban and rural areas remains a priority as guests continue to explore Belize. Initiatives include installing more directional signs, aggressive anti-litter and Civic Pride Campaigns, and acquiring five garbage trucks to address waste management issues. Under the MTDR and the BTB, numerous projects are transforming the industry, including the Placencia Polyclinic, Seine Bight

Cultural Center, Belize City Fish Market, Gales Point Manatee Rehabilitation Center, Fort Point Seawall and Boardwalk Project, Corozal Bay Upliftment Project, San Pedro Artisan Market, Punta Gorda Cultural Center, Caye Caulker Tarpon Feeding Area, and further enhancements in the Cayo District. Additionally, projects include the rehabilitation of Cemetery Road and paving the main street in Sarteneja.



Urban upliftment is a main priority under the updated National Sustainable Tourism Master Plan

Hotel Investment

Belize's hotel infrastructure continues to expand with notable projects like the Four Seasons on Caye Chapel, Fort George Hotel, Margaritaville, Island Magic Villas, and expansions to properties like Blue Zen, Golden Bay, and the Biltmore, totalling over BZ\$600 million. Significant investments are being made by Belizean investors, highlighting local confidence in the tourism sector.



Belize is seeing a growing demand in hotel investments, by both local and foreign investors.

Security and Safety



Tourism is a committed partner for security enhancement and development within Belize's key tourism destinations.

Tourism security and safety remain top priorities, with the BTB expanding support for the TPU by adding 20 officers, expanding TPU headquarters, and providing vehicles, equipment, and security enhancements. The establishment of the National Tourism Security Task Force aims to guide tourism security nationwide. Additionally, support was given for the construction of police stations in Seine Bight and Northern Ambergris Caye.

Training and Capacity Development

Relevant and affordable training and capacity development are high on the agenda. The National Training Program *Elevate* trained over 1,500 persons in 2022 and approximately 1,800 in 2023, fostering skills in customer service, food and beverage management, safety and security, business management, tour guiding, tour specialization, and packaging. The Elevate Training Academy is in the design phase, and the first cohort of 24 participants graduated with a diploma in Hotel and Lodging Management. The largest training expos in 2022 and 2023 saw significant participation, and over 700 new tour guides were trained in various locations including Cayo, San Pedro, Belize City, Placencia, Caye Caulker, Orange Walk, Sarteneja, and Gales Point.



The BTB continues to enhance the capacity and skills of the tourism workforce through its Elevate program

Destination Outreach

National licensing information sessions addressed stakeholder concerns, and the first-ever tour guide licensing clinic issued 693 licenses in nine destinations. Belize currently has 2,271 tour guides and 320 tour operators. Ministerial visits were conducted in key tourism destinations such as Placencia, Caye Caulker, San Pedro, Dangriga, Hopkins, Punta Gorda, San Ignacio, Belize City, Corozal Town, and Orange Walk Town to engage with stakeholders and address local needs.



The BTB continues its proactive engagement of stakeholders throughout the year, via customer-focused destination clinics

Support for Sports Tourism, Culture, and Events

These are the national events and festivals supported by the Ministry in 2023/24

- Sports: cycling, football, basketball, Pok ta Pok Games
- Ruta Maya
- Battle of the Drums
- International Music and Food Festival
- Chocolate Festival,
- Belize International Film Festival,
- Belize Birding Festival,
- September Celebrations,
- BTB Love Belize Sea Challenge,
- BTB Digital Marketing Summit,
- Airlift Development Conference,
- Belize Band Fest,
- Lobster Festivals,
- Mango Fest, and
- various fishing tournaments.



The Belize International Music and Food Festival has now become the largest of its kind in Belize and Central America

Diaspora Relations

The contributions of Belizeans living abroad are invaluable. More Belizeans are returning to visit and invest, with remittances for 2023 exceeding \$220 million and donations valued at nearly \$2 million. The diaspora offers skills, expertise, and cultural diversity, and efforts continue to strengthen these bonds, reflecting a greater sense of commitment to the nation's success.



The Diaspora Relations Unit continues to create linkages and enhance the Belizean diaspora's role in the development of Belize

The team at the Diaspora Relations Unit engages in regular meetings and social meet-and-greet events in foreign cities where Belizeans live. This engagement has resulted in improved confidence and better interactions between Belizeans at home and abroad. Services are also provided, including the administering of the DRIP program.

Border Management Agency

The BMA continues to rehabilitate border facilities and improve border-crossing processes for citizens and visitors.

This has been accomplished through various initiatives, including facility refurbishments, security surveillance modernization, and staff retraining. These improvements have positively impacted the safety, security, and overall experience for visitors and border personnel. A rebranding of the organization is still underway, and upgrades at the Western and Northern Borders continue. A focus has been placed on restoring financial stability and providing extensive customer service training to staff.

The organization’s future plans include building a marina in Punta Gorda Town with about twelve boat slips and amenities to attract more vessels and tourists. Border points, as is the case with the international airport, provide first and last impressions for guests, making it essential to deliver the best possible experiences.



The BMA is creating connections and facilitating travel and trade at our borders

Lessons Learned

Over the past year, Belize has made significant strides under #planBelize. The tourism industry, which contributes nearly half of the country's economy, has rebounded robustly post-pandemic

due to strategic investments and innovative policies. This section highlights the key lessons learned, focusing on sustainable growth, stakeholder engagement, and infrastructure development. Belize's achievements demonstrate the effectiveness of strategic planning and sustainable development, providing a blueprint for continued growth and resilience. These initiatives ensure Belize remains a leading destination for tourism and a model for sustainable economic development.

Economic Growth and Employment

Belize's economic growth and reduction in unemployment underscore the effectiveness of targeted policies. The focus on sustainable economic growth through responsible development has been pivotal. Lessons learned include the importance of continuous monitoring and adaptation to global economic trends, ensuring policies remain relevant and impactful.

Tourism Sector Resilience

The rapid recovery of the tourism sector, achieving 93% of pre-pandemic tourist arrivals, highlights the resilience of this industry. Key lessons include:

- **Adaptability:** Post-pandemic shifts necessitated flexible and innovative policy responses to changing consumer demands and global economic conditions.
- **Stakeholder Collaboration:** Successful recovery was driven by strong public-private partnerships and engagement with the Belizean diaspora, emphasizing the value of collaborative efforts.
- **Marketing and Promotion:** Targeted marketing campaigns, particularly in untapped regions like Latin America, were crucial in planning for future diversifying and extending the tourism season.

Infrastructure and Connectivity

Investments in infrastructure, including airlift capacity and road improvements, are necessary for. Lessons learned:

- **Strategic Investments:** Focused investments in key infrastructure projects enhance accessibility and visitor experience. Ongoing coordination with MIDH and other partners remains necessary.
- **Environmental Stewardship:** Emphasizing sustainability, preserves natural attractions essential for tourism. Partnerships to achieve this is critical.

Training and Capacity Building

The *Elevate* National Training Program and other capacity-building initiatives have been instrumental in enhancing service quality and workforce skills. Key takeaways:

- **Continuous Education:** Ongoing training and development are critical for maintaining high service standards and adapting to industry changes.
- **Inclusive Opportunities:** Expanding training programs to various locations ensures accessibility as well as widespread participation and benefits.

Security and Safety

Enhanced tourism security through the expansion of the Tourism Police Unit and establishment of a National Tourism Security Task Force has improved overall safety. Lessons learned:

- **Proactive Measures:** Continuous investment in security infrastructure and personnel is essential for maintaining a safe environment for tourists.
- **Community Engagement:** Involving local communities in safety initiatives fosters a collaborative approach to security.

Diaspora Engagement

The increasing contributions from the Belizean diaspora highlight the importance of maintaining strong connections with citizens abroad. Lessons learned:

- **Partnerships with BTB:** Encouraging diaspora engagement through partnerships with BTB can significantly boost tourism and investment.

- Integration: Leveraging the diversity and expertise of the diaspora enhances opportunities for Belizeans at home as well as builds on the tourism experience.



The Ministry will continue to seek ways to increase the contributions of the Belizean diaspora in the development of our nation

Future Priorities & Plans

Building on its progress, Belize now aims to sustain and enhance its growth. Future priorities include market diversification, especially in Europe, continued tourism development, infrastructure enhancement, capacity building, security improvements, and diaspora engagement. Focusing on these areas will ensure sustainable growth, improved quality of life, and better global positioning. Continued commitment to these priorities will solidify Belize's status as a top tourism destination and a model for sustainable development.

Based on the past and projected trends in the key indicators of the tourism sector, the MTDR will be laser-focused on exceeding the projections for 2024 and 2025.

Table 1. Key performance indicators and projections for Belize tourism

Indicator	2019	2021	2022	2023	Projected	
					2024	2025
Overnight visitors	503,166	218,991	372,614	464,723	549,842	594,160
Cruise ship visitors	1,170,558	210,206	618,255	903,977	916,798	960,355
Total visitors	1,673,724	429,197	990,869	1,368,700	1,466,640	1,554,515
GDP contribution, %¹	37.3	23.4	29.8	30.8	31.6	32.9
People employed	21,279	17,017	19,923	22,140	22,583	23,034
Women employed	10,494	7,417	9,644	10,737	11,059	11,391

Source: Belize Tourism Board, Belize City

Economic Diversification and Growth

- **Promote Sustainable Economic Growth:** Encourage responsible development across diverse sectors that affect tourism (including agriculture, transportation, immigration, civil aviation, technology, and renewable energy).
- **Support MSMEs:** Provide more incentives and additional support programs for MSMEs to foster innovation and entrepreneurship in the tourism industry and supporting businesses throughout the value chain.

Tourism Development

¹ According to the World Trade and Trade Council Economic Impact Reports- Fact Sheet (2019 – 2024)

- **Enhance Marketing Strategies:** Expand marketing efforts to new and emerging markets, Europe in particular, leveraging digital platforms and targeted campaigns to attract a diverse range of tourists.
- **Invest in Sustainable Tourism initiatives:** Promote Belize as a leading destination for sustainable tourism by encouraging and promoting sustainable tourism practices and preserving natural and cultural heritage (keeping a focus on climate resilience).
- **Expand Tourism Infrastructure:** Support the development of new hotels, resorts, and recreational facilities while upgrading existing ones to meet growing demand and enhance visitor experiences.

Infrastructure Enhancement

- **Improve Transportation Networks:** Continue upgrading roads, airports, land borders and seaports to facilitate seamless travel and connectivity across the country.
- **Develop Resilient Utilities:** Invest in reliable and sustainable energy, water, and waste management systems to support tourism and overall economic growth.
- **Modernize Public Facilities:** Enhance public amenities such as hospitals, schools, and recreational areas (including attractions) to improve quality of life for residents and visitors.
- **Enhance Urban Hubs:** Carry out urban rejuvenation and enhancement projects to improve the urban experience for citizens and visitors.

Capacity Building and Training

- **Expand Training Programs:** Increase the scope and reach of capacity-building initiatives like the *Elevate* National Training Program to equip the workforce with relevant skills. This must also be done in accordance with plans for the development of a National Training Institute.
- **Foster Education and Innovation:** Collaborate with educational institutions to develop programs that encourage innovation and technical expertise in key sectors at all educational levels.

- **Support Workforce Development:** Provide continuous professional development opportunities to ensure a skilled and adaptable workforce.



The BTB will continue expanding its Elevate Training Program to culminate with the development of a Hospitality Training Institute

Security and Safety

- **Enhance Tourism Security:** Expand the TPU and establish more security infrastructure to ensure a safe environment for tourists.
- **Implement Community Safety Programs:** Engage local communities in safety initiatives to create a secure and welcoming atmosphere.
- **Strengthen Emergency Response:** Develop comprehensive emergency response plans and systems to handle potential crises effectively.

Diaspora Engagement

- **Strengthen Diaspora Relations:** Foster stronger connections with the Belizean diaspora to encourage investment, tourism, and cultural exchange.
- **Leverage Diaspora Expertise:** Utilize the skills and knowledge of the diaspora to support national development projects and initiatives.
- **Promote Cultural Integration:** Enhance cultural programs and events that celebrate Belizean heritage and engage the diaspora community.

Staffing & Financial Considerations

Effective human resource and financial management are crucial for executing the MTDR's goals. Staffing and financial resources are vital to the success of a small government ministry tasked with the significant mandate of tourism industry growth and development. MTDR works closely with its statutory bodies, BTB and BMA, to execute on this mandate.

Adequate and well-trained staff ensure efficient operations, high service standards, and the effective implementation of strategic objectives and initiatives. Sound financial management enables investment in key priority areas.

Being ISO 9001 certified further enhances MTDR's credibility and commitment to a quality management system that ensures a high level of standards for processes and procedures focused on communication, continuous improvement, compliance, customer satisfaction, competency, and training. ISO 9001 QMS requires organizations to follow systematic procedures for managing quality and emphasizes accountability and consistency in delivering services. This certification means that MTDR adheres to internationally recognized quality standards, which builds trust with stakeholders and boosts operational efficiency. Additionally, maintaining this certification necessitates undergoing regular international audits, ensuring that MTDR continually meets rigorous quality standards. The QMS empowers the MTDR to meet its objectives professionally and efficiently, drive sustainable tourism growth, and contribute significantly to the broader economic development goals of the nation.



See Annexes for organogram, a list of staff and approved budget for the ministry.

Recommendations & Conclusion

Recommendations

To further promote sustainable growth across various sectors, including agriculture, technology, and renewable energy, it is essential to support MSMEs through incentives and innovation programs to drive entrepreneurship and economic diversity. Expanding marketing efforts to target new and emerging markets and leveraging digital platforms for wider reach will be crucial for tourism development. Investing in sustainable tourism initiatives can position Belize as a leading destination for sustainable travel. Additionally, developing and upgrading tourism infrastructure to accommodate increasing visitor numbers and enhance experiences will be vital.



Improving transportation networks, including roads, airports, land borders, and seaports, will ensure seamless travel and support economic growth. Investments in sustainable and resilient utilities are necessary to maintain the quality of life for residents and tourists alike. Modernizing public facilities such as hospitals, schools, and recreational areas will benefit both the local population and visitors.

Expanding and diversifying training programs to equip the workforce with relevant and advanced skills is essential. Fostering education and innovation through collaborations with educational institutions and industry stakeholders will further support capacity building. Providing ongoing professional development opportunities will ensure a skilled and adaptable workforce.

Enhancing tourism security by expanding the TPU and implementing robust safety measures will create a secure environment. Engaging local communities in safety initiatives will foster a

welcoming atmosphere for tourists. Developing comprehensive emergency response plans will ensure public safety and effective crisis management.

Strengthening diaspora relations through targeted programs and initiatives will encourage investment and cultural exchange. Leveraging the expertise of the Belizean diaspora to support national development projects will drive economic growth. Promoting cultural integration and celebrating Belizean heritage through events and programs will engage the diaspora community and enrich Belize's cultural landscape.

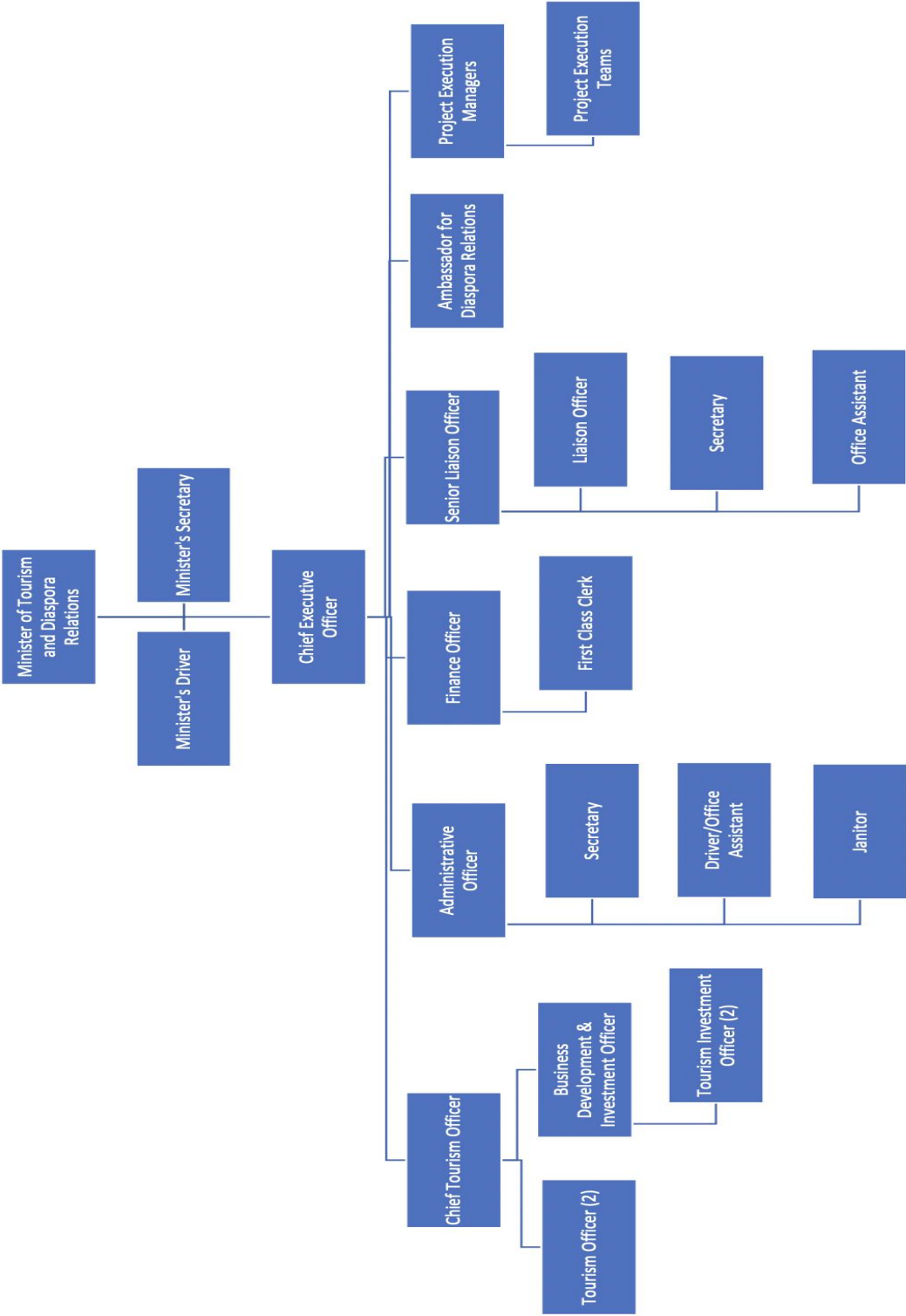
Conclusion

The outlook for the future of overnight and cruise tourism in Belize is positive. Continued investments in the industry will ensure its sustainability. With the successful recovery of tourism to near pre-pandemic levels, Belize has demonstrated its resilience and capacity to adapt to changing global conditions. Strategic investments have significantly boosted the overall visitor experience and accessibility. Moreover, the emphasis on sustainable tourism practices ensures that growth is not only robust but also responsible, preserving the natural and cultural heritage that makes Belize a unique destination.

The government's commitment to expanding marketing efforts, targeting new and emerging markets, and leveraging digital platforms will continue to attract a diverse range of tourists. The focus on sustainable tourism and adventure tourism positions Belize as a premier destination for those seeking authentic and sustainable travel experiences. Additionally, ongoing training and capacity-building programs ensure that the workforce is equipped with the skills needed to meet the evolving demands of the tourism industry, maintaining high standards of service and hospitality.

As Belize continues to innovate and adapt, it is well positioned to achieve sustained growth in its tourism sector, contributing significantly to the overall economic development of the country.

Annex 1. Organizational Structure of the MTDR



Annex 2. List of Professional and Technical Staff

Staff List

No.	Name of Officer	Post	Unit
1	Nicole Solano	Chief Executive Officer	Administrative
2	Angelica Luna	Administrative Officer	Administrative
3	Catherine Swan	Secretary I	Administrative
4	Angia Gillett Betson	Janitor	Administrative
5	Tyrone Castillo	Driver/Office Assistant	Administrative
6	Mycele Stephen	Minister's Secretary	Administrative
7	Kim Taylor	Driver/ Handyman	Administrative
8	Henry Moreira	Minister's Aide	Administrative
9	Carroll David Azueta	Finance Officer I	Finance
10	Dolores Aguilar	First Class Clerk	Finance
11	Abil Castaneda	Chief Tourism Officer	Technical
12	Jonelle Hemmans	Business Development & Investment Officer	Technical
13	Eddie Herrera	Tourism Officer	Technical
14	Darcy Correa	Tourism Officer	Technical
15	John Usher	Tourism Officer	Technical
16	Luis Verde	Regional Integration Coordinator	Regional Integration
17	Miguel Hernandez	Regional Integration Officer	Regional Integration
18	Ermelinda Montero	Administrative Assistant	Regional Integration
19	Sandra Mahler	Senior Liaison Officer	Diaspora Relations
20	Vivienne Acosta	Liaison Officer	Diaspora Relations
21	Kristen Williams	Secretary III	Diaspora Relations
22	Bruce Mangar	Office Assistant	Diaspora Relations
23	Sandhya Murphy	Ambassador for Diaspora Relations	Diaspora Relations

Annex 3. Budget distribution of the MTDR

PROGRAMME EXPENDITURE BY ECONOMIC CLASSIFICATION									
RECURRENT EXPENDITURE									
SH No.	Item	Details of Expenditure	2021/22 Actual	2022/23 Actual	2023/24 Budget Estimate	2023/24 Revised Estimate	2024/25 Budget Estimate	2025/26 Forward Estimate	2026/27 Forward Estimate
30		PERSONAL EMOLUMENTS	\$502,395	\$577,345	\$643,428	\$515,833	\$642,588	\$642,588	\$642,588
	1	Salaries	\$462,605	\$387,507	\$369,612	\$355,634	\$383,317	\$383,317	\$383,317
	2	Allowances	\$8,750	\$34,950	\$65,976	\$37,898	\$61,200	\$61,200	\$61,200
	3	Wages (Unestablished Staff)	\$11,558	\$130,648	\$172,464	\$100,129	\$163,641	\$163,641	\$163,641
	4	Social Security	\$16,358	\$20,187	\$20,580	\$17,058	\$20,030	\$20,030	\$20,030
	7	Overtime	\$3,124	\$4,052	\$14,796	\$5,114	\$14,400	\$14,400	\$14,400
31		TRAVEL AND SUBSISTENCE	\$4,753	\$21,608	\$29,832	\$15,153	\$27,446	\$27,446	\$27,446
	1	Transport Allowance	\$300	\$3,600	\$3,924	\$3,027	\$4,000	\$4,000	\$4,000
	3	Subsistence Allowance	\$756	\$1,514	\$11,556	\$1,645	\$8,656	\$8,656	\$8,656
	5	Other Travel Expenses	\$3,697	\$16,494	\$14,352	\$10,481	\$14,790	\$14,790	\$14,790
40		MATERIAL AND SUPPLIES	\$19,171	\$33,973	\$68,316	\$47,883	\$88,339	\$88,339	\$88,339
	1	Office Supplies	\$5,621	\$9,886	\$5,280	\$3,537	\$5,800	\$5,800	\$5,800
	4	Uniforms	\$6,173	\$9,820	\$10,656	\$2,844	\$13,500	\$13,500	\$13,500
	5	Household Sundries	\$7,377	\$11,918	\$14,532	\$13,602	\$18,000	\$18,000	\$18,000
	6	Food	\$0	\$2,076	\$17,136	\$14,231	\$26,200	\$26,200	\$26,200
	14	Computer Supplies	\$0	\$0	\$10,512	\$8,567	\$18,300	\$18,300	\$18,300
	23	Printing Services	\$0	\$273	\$10,200	\$5,102	\$6,539	\$6,539	\$6,539
41		OPERATING COSTS	\$29,366	\$136,325	\$338,532	\$129,332	\$192,864	\$192,864	\$192,864
	1	Fuel	\$18,813	\$22,786	\$50,808	\$25,524	\$54,525	\$54,525	\$54,525
	2	Advertising	\$4,248	\$31,543	\$25,236	\$20,084	\$74,800	\$74,800	\$74,800
	3	Miscellaneous	\$5,485	\$12,192	\$0	\$0	\$0	\$0	\$0
	6	Mail Delivery	\$36	\$34,089	\$42,084	\$25,186	\$42,540	\$42,540	\$42,540
	8	garbage disposal	\$0	\$0	\$1,224	\$1,069	\$3,000	\$3,000	\$3,000
	9	Conferences and Workshops	\$785	\$20,990	\$203,892	\$45,928	\$0	\$0	\$0
	10	Legal & Other Professional Fees	\$0	\$14,726	\$0	\$0	\$0	\$0	\$0
	29	Professional Service Fees	\$0	\$0	\$15,288	\$11,541	\$18,000	\$18,000	\$18,000
42		MAINTENANCE COSTS	\$35,993	\$70,030	\$135,804	\$34,709	\$129,211	\$129,211	\$129,211
	1	Maintenance of Buildings	\$2,233	\$11,172	\$8,628	\$5,355	\$15,200	\$15,200	\$15,200
	2	Maintenance of Grounds	\$1,282	\$2,421	\$10,104	\$2,091	\$11,010	\$11,010	\$11,010
	3	Furniture and Equipment	\$3,224	\$1,740	\$11,832	\$986	\$5,400	\$5,400	\$5,400
	4	Repairs and Maintenance of	\$15,147	\$7,329	\$12,888	\$9,435	\$13,670	\$13,670	\$13,670
	5	Computer Hardware	\$1,985	\$685	\$17,568	\$1,464	\$14,400	\$14,400	\$14,400
	6	Computer Software	\$8,922	\$40,210	\$59,700	\$11,298	\$51,000	\$51,000	\$51,000
	8	other equipment	\$0	\$0	\$3,720	\$547	\$6,010	\$6,010	\$6,010
	10	Vehicle Parts	\$3,200	\$6,474	\$11,364	\$3,533	\$12,520	\$12,520	\$12,520
43		TRAINING	\$1,104	\$1,213	\$43,908	\$6,425	\$24,500	\$24,500	\$24,500
	1	Course Costs	\$54	\$463	\$28,044	\$2,337	\$24,500	\$24,500	\$24,500
	5	Miscellaneous	\$1,050	\$750	\$15,864	\$4,088	\$0	\$0	\$0
46		PUBLIC UTILITIES	\$24,301	\$35,227	\$43,320	\$31,087	\$47,658	\$47,658	\$47,658
	4	Telephone	\$24,301	\$35,227	\$43,320	\$31,087	\$47,658	\$47,658	\$47,658
48		CONTRACTS & CONSULTANCIES	\$33,071	\$17,966	\$46,896	\$4,458	\$22,200	\$22,200	\$22,200
	2	Payments to Consultants	\$33,071	\$17,966	\$46,896	\$4,458	\$22,200	\$22,200	\$22,200
49		RENT & LEASES	\$21,100	\$3,900	\$7,140	\$3,595	\$194,850	\$194,850	\$194,850
	3	Rent & lease of other building	\$0	\$0	\$0	\$0	\$117,500	\$117,500	\$117,500
	5	Rent & lease of other equipmen	\$0	\$0	\$0	\$0	\$69,500	\$69,500	\$69,500
	9	Other rent & lease	\$21,100	\$3,900	\$7,140	\$3,595	\$7,850	\$7,850	\$7,850
TOTAL RECURRENT EXPENDITURE			\$671,253	\$897,586	\$1,357,176	\$788,475	\$1,369,657	\$1,369,657	\$1,369,657

Annex 4. List of Publications and Reports

Updated National Sustainable Tourism Master Plan, Ministry of Tourism and Diaspora Relations, Belmopan City, Belize

<https://drive.google.com/file/d/14hh1VUjPQ-USD9gq8L-3V7PsgAAAtB4n/view?usp=sharing>

Updated Cruise Tourism Policy, Ministry of Tourism and Diaspora Relations, Belmopan, Belmopan City, Belize

https://drive.google.com/drive/folders/1U29hPQ4EbSPue8o-SkV7rrE4TuhsIcEB?usp=drive_link